



# Transport for NSW Walking Customer Value Proposition (CVP) Research

A large, abstract graphic in the bottom-left corner consisting of several overlapping, rounded rectangular shapes in shades of red and white, creating a stylized, organic form.

FINAL Draft Report

June 2013



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for NSW

# Executive summary



## Key insights to take away from the walking CVP research

- There are four needs sets that should be met in order to persuade customers in NSW to walk more often and/or further
  1. Connectivity and flow of footpaths to public transport and centres
  2. Pedestrian safety and personal security
  3. Health and well being benefits
  4. Supporting facilities including complete shade or rain coverage on key routes and at interchanges
- Customers identify that both infrastructure and non infrastructure initiatives are important for persuading them to walk more and/or further
- There is a large group of customers who state they could walk more
  - For this group, promoting the physical health benefits of walking, improving connectivity and directness of routes, improving pedestrian safety and personal security and providing complete shade or rain coverage on key routes and around public transport interchanges are most important for persuading them to walk more and/or further
- Overall satisfaction with walking is significantly higher than most other transport modes. Satisfaction tends to be lower when walking part of the way to work than when walking the whole way to work or for other types of purposes
  - Although satisfaction with attributes varies by trip purpose, customers tend to be dissatisfied the most with the adequacy of shelter and protection from weather conditions and amenities and facilities during and at the end of the trip
  - Physical health benefits is the most important reason for choosing to walk for all customers
- There is an opportunity to bring together stakeholders from across NSW to accelerate delivery of initiatives based on priority and ownership to drive increases to mode share for walking



# The Walking CVP research sets out to inform the walking mode strategy and the initiatives to be rolled out from it

## Walking mode share target

To achieve an increase in mode share to 25% (from 22.5%) in the Greater Sydney region for local (5km) and district (10km) trips (on an average day) by 2016 (NSW 2021)

### Research inputs

- Quantitative research through an online survey** with customers who walk for other trip purposes and/or for part or all of their trip to work (n=1,203)
- Qualitative research through focus groups** with those who walk for part or all of their trip to work and/or for other trip purposes
- Review of existing literature:** Analysis of existing walking research undertaken both domestically and internationally
- Journey mapping of key experience attributes** across the end to end walking journey

### Research outputs

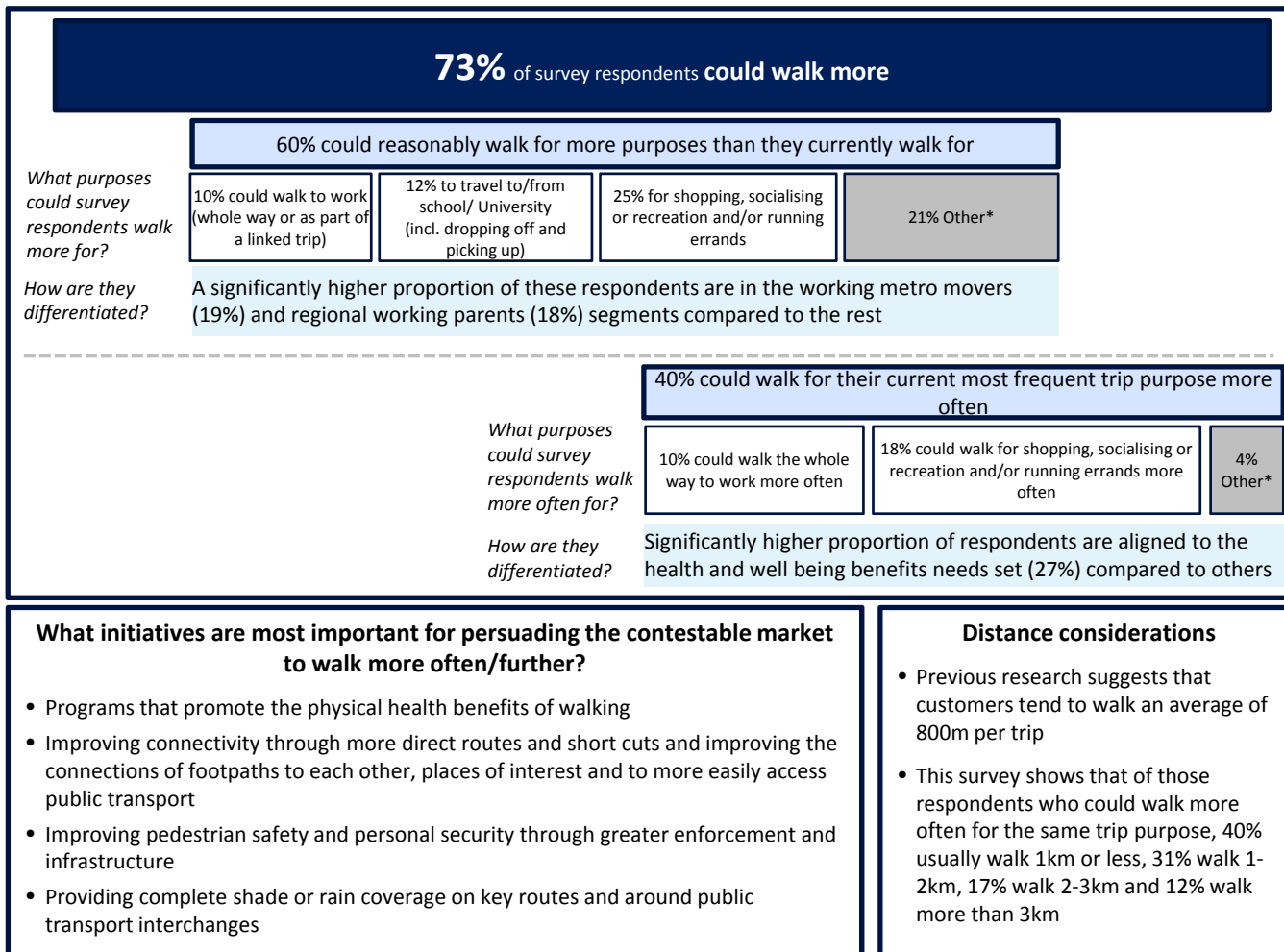
Journey Maps	To identify and communicate important attributes across the customer journey
Importance & Satisfaction	To analyse the importance and satisfaction of attributes
Moments of Truth	To analyse those attributes that have the biggest impact of customer experience
Initiatives	To identify those initiatives that would have the biggest and least impact on customer experience
Customer Value Propositions	To define the product features that resonate the most with customers' core needs sets
Segmentation	To group customers based on the best predictors of customer needs sets
Mode Usage	To identify how needs change based on frequency and duration

### Research outcomes

- Better decision-making on investment priorities
- +
- More effective programs and projects that will increase walking in NSW
- +
- Provide guidance on information and promotion requirements, effective messaging and channels for travel behaviour change



## Improvements to safety, connectivity and promotion of the physical health benefits of walking are most important for persuading the contestable market to walk more



\*Note: Other includes accessing Government services, accessing health care and accessing social care services. These have been excluded from analysis as trips are most commonly taken for this purpose once per month and therefore has limited impact on mode share. In the case of walking for more purposes, participants were allowed to select multiple purposes they could walk for that they currently don't (QA8) and therefore the result sums to greater than 60%

\*\*Note: 23% of survey respondents stated they could not walk for more purposes than they currently do and/or currently walk the maximum amount for their most frequent trip purpose. It was assumed that for other purposes that they currently walk for (except their most frequent) that they are already walking at maximum capacity and therefore cannot walk more often for these purposes

There are four sets of needs that should be met in order that customers walk more often/further

**Customer needs**



**Supporting facilities**

“I value comfort while walking supported by adequate facilities and amenities”

21% of respondents



**Connectivity and flow**

“I value a direct route and reduced delays”

28% of respondents



**Pedestrian safety and personal security**

“I value my safety and security through infrastructure improvements and the safe behaviour of other road users”

28% of respondents

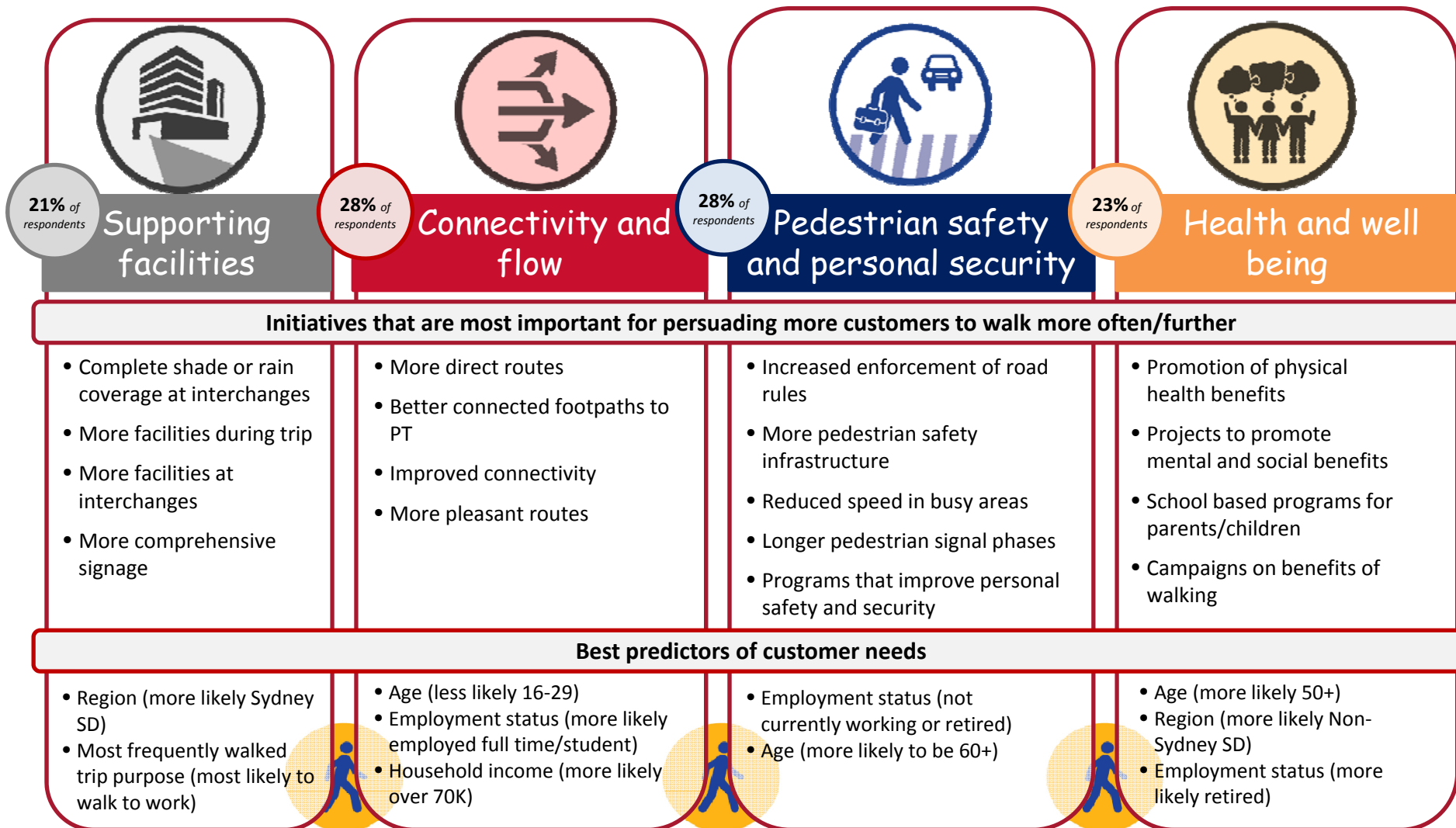


**Health and well being**

“I value the physical health and emotional well being benefits I get from walking”

23% of respondents

Different initiatives that deliver across the four sets of needs are influential in persuading more customers to walk more/further







## Six distinct customer segments have been identified

A meaningful and actionable segmentation framework has been identified, based on those variables that best explain differences between customer needs. The figure below outlines these six segments based on age, region, most frequent trip purpose and other factors which are good predictors of needs.

### *How old are you? Where do you live?*

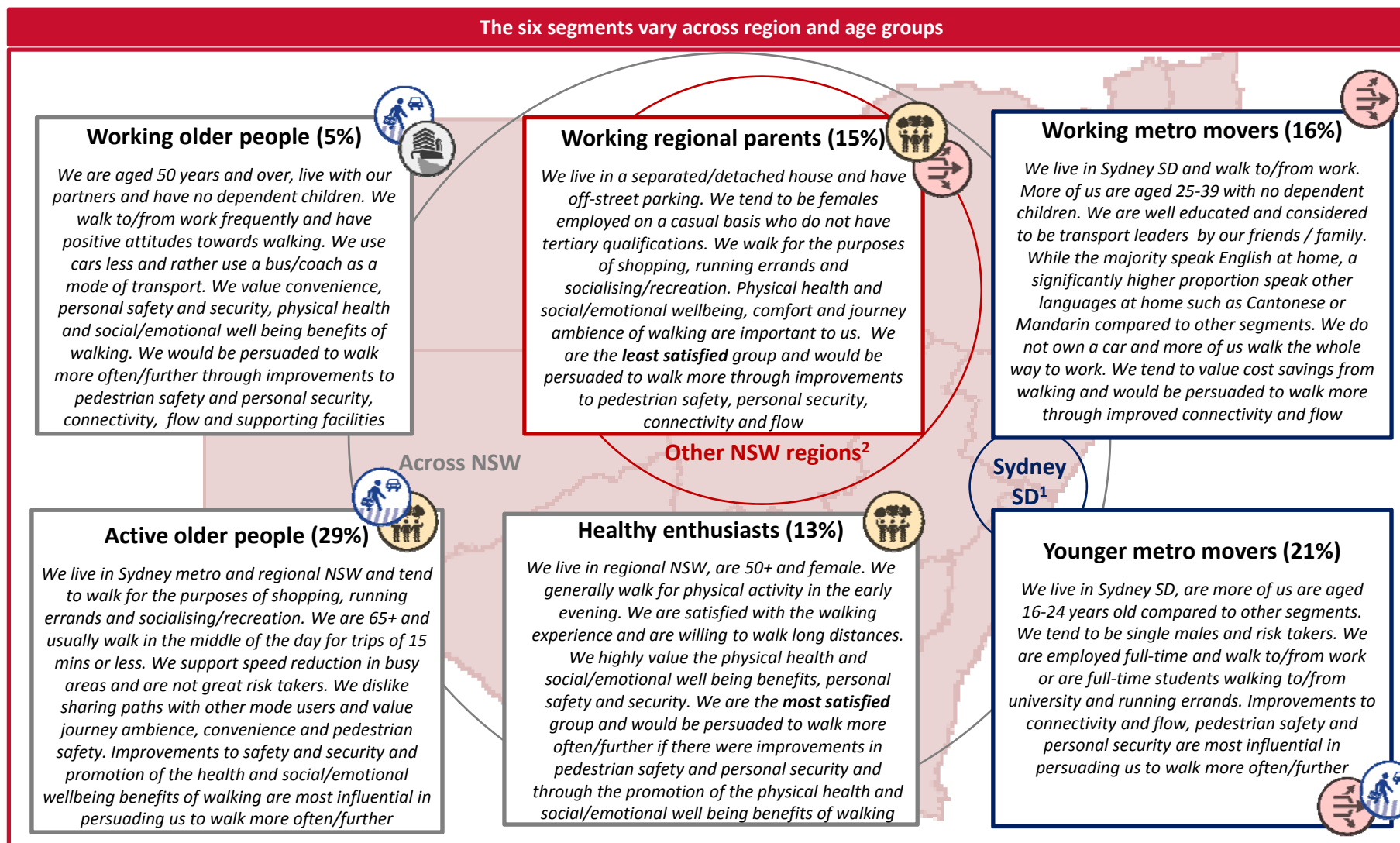
		Under 50		Over 50	
		Sydney SD <sup>1</sup>	Other NSW <sup>2</sup>	Sydney SD <sup>1</sup>	Other NSW <sup>2</sup>
<b>For what purpose do you walk most frequently?</b>	<b>Travelling to/from work (walk whole way or as part of a linked trip)</b>	<b>Working metro movers</b> 16% (n=303)	<b>Working regional parents</b> 15% (n=170)	<b>Working older people</b> 5% (n=155)	
	<b>Other transport trip purposes</b>	<b>Younger metro movers</b> 22% (n=128)		<b>Active older people</b> 29% (n=333)	
	<b>Physical activity with no transport purpose</b>	<b>Healthy enthusiasts</b> 13% (n=114)			

<sup>1</sup>Sydney SD includes Inner Sydney, Parramatta, Penrith, Other Sydney

<sup>2</sup>Other NSW includes: Illawarra, Central Coast, Newcastle, Central West and Far West, Lower Illawarra, Southern, Murray-Murrumbidgee, Mid North Coast, New England and Northern Rivers Regions

## Six unique segments have been identified in the NSW population, each finding different propositions more appealing than others

The six segments vary across region and age groups



<sup>1</sup>Sydney SD includes Inner Sydney, Parramatta, Penrith, Other Sydney

<sup>2</sup>Other NSW includes: Illawarra, Central Coast, Newcastle, Central West and Far West, Lower Illawarra, Southern, Murray-Murrumbidgee, Mid North Coast, New England and Northern Rivers Regions

## Those who walk for part of a linked trip to/from work differ in travel behaviour to those who walk the whole way to work and other trip purposes

	n=629 Walk only for purposes other than walking to work	n=304 Walk as part of a linked trip to work	n=270 Walk the whole way to work
<b>Respondents</b>	73% of respondents indicated that they have walked for purposes other than walking to work	27% of respondents indicated that they have walked as part of a linked trip to work (may also have walked for other purposes)	16% of respondents indicated that they have walked the whole way to work (may also have walked for other purposes)
<b>Distance</b>	Median distance they currently walk is <b>1-2kms</b> but they feel they could walk for <b>2-3 kms</b>	Median distance they currently walk is <b>&lt;1km</b> but they feel they could walk for <b>1-2kms</b>	Median distance they currently walk is <b>1-2kms</b> but they feel they could walk for <b>2-3 kms</b>
<b>Time</b>	Median time they currently walk for is <b>15-20mins</b> but they feel they could walk for <b>25-30mins</b>	Median time they currently walk for is <b>5-10mins</b> but feel they could walk for <b>15-20mins</b>	Median time they currently walk for is <b>15-20mins</b> but they feel they could walk for <b>25-30mins</b>
<b>Drivers / barriers</b>	<p>Top <b>three most important reasons</b> for <b>choosing to walk</b> :</p> <ul style="list-style-type: none"> <li>• I gain physical health benefits</li> <li>• It is good for my emotional wellbeing and it helps me unwind</li> <li>• Walking offers me more flexibility and independence than any other transport mode</li> </ul>	<p>Top <b>three most important reasons</b> for <b>choosing to walk</b> :</p> <ul style="list-style-type: none"> <li>• It is the only way to access my public transport journey</li> <li>• I gain physical health benefits</li> <li>• Cost savings</li> </ul>	<p>Top <b>three most important reasons</b> for <b>choosing to walk</b> :</p> <ul style="list-style-type: none"> <li>• I gain physical health benefits</li> <li>• Cost savings</li> <li>• It is good for my emotional wellbeing and it helps me unwind</li> </ul>

Note: Respondents were asked about their most frequent trip purpose:

- Walk for purposes other than walking to work (n=629)
- Walk as part of a linked trip to work (n=304)
- Walk the whole way to work (n=270)

For those who do not **walk for all or part of their trip to work**, the top three reasons for choosing **not to walk** for this purpose are:

- It is a long distance
- The terrain (e.g. too hilly, too bumpy etc)
- I am not motivated to walk (i.e. too much effort)

Note: n = 1,203

Source: Transport for NSW, Walking CVP Research, June 2013



# Moments of Truth can be used to prioritise attributes of greatest importance and impact on overall satisfaction

Attribute categories as defined by the NSW population									
Safety (behavior)	Safety (infrastructure)	Personal safety and security	Convenience due to time	Convenience due to ease of access and connectivity	Trip Information	Physical, social and emotional wellbeing	Journey ambience and environment	Comfort through support facilities	Financial considerations
Road users behaving safely around pedestrians	Quality of pedestrian space	Feeling safe and secure	Trip distance	Convenience of connecting to PT	Appropriate signage	Physical health benefits	Appropriate weather conditions	Protection from weather	Transport cost savings
	Structures to support safety	Adequate street lighting	Trip time	Easy access to work, education etc	Adequate trip planning information	Emotional wellbeing	Pleasant route	Adequate amenities during trip	
	Safety in pedestrian space	Clear line of sight	More convenient mode	Direct access to services		Time spent alone	Cleanliness of footpaths, streets and public spaces	Adequate facilities that support mobility	
	Capacity of footpath		Avoiding parking	Connectivity		Time spent with others		End of trip facilities	
			More consistent mode journey time	Available route options		Environmental benefits			
			Waiting time at traffic signals	Interchange accessibility		Interacting with community			

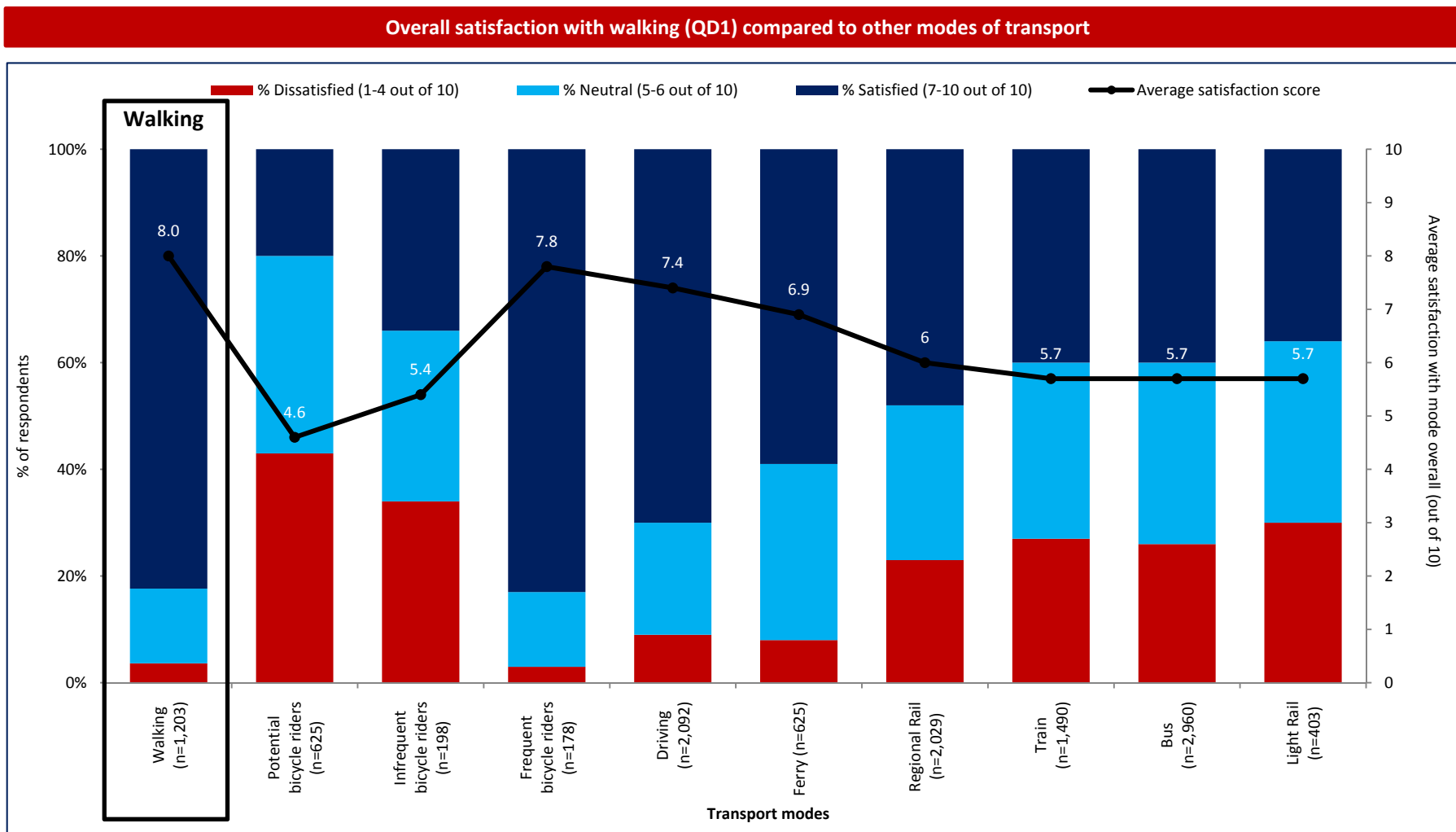
**Legend:** Moment of Truth (high importance and correlation to satisfaction)

Source: Transport for NSW, Walking CVP Research, June 2013



Transport for NSW

# Overall satisfaction for walking is significantly higher than most other transport modes

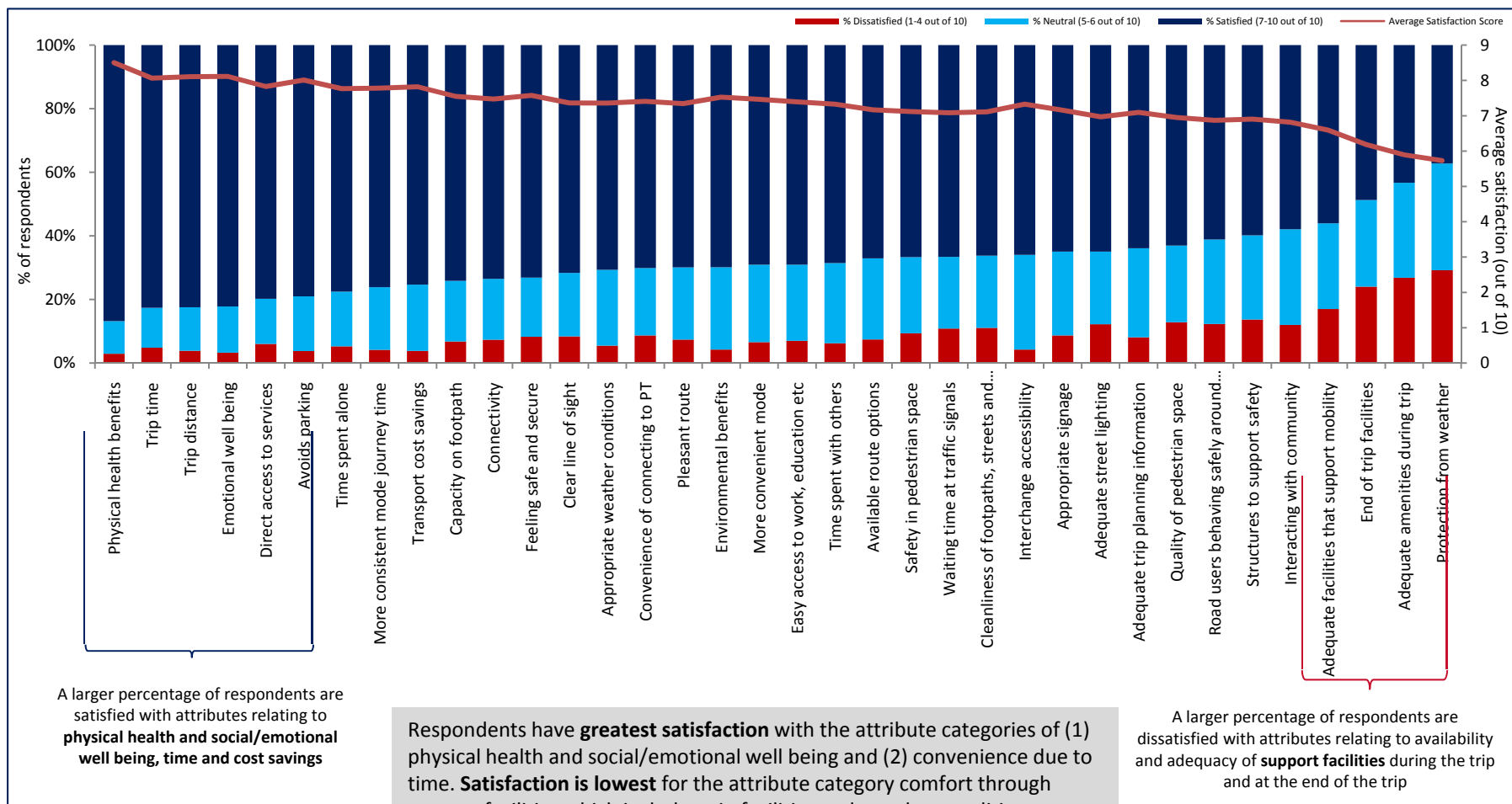


Source: Transport for NSW, Walking CVP Research, June 2013



# More customers are satisfied with physical health and social/emotional wellbeing benefits of walking, time and cost savings

**% of respondents that are satisfied and dissatisfied with attributes of their walking journey (QD4)**



A larger percentage of respondents are satisfied with attributes relating to **physical health and social/emotional well being, time and cost savings**

Respondents have **greatest satisfaction** with the attribute categories of (1) physical health and social/emotional well being and (2) convenience due to time. **Satisfaction is lowest** for the attribute category comfort through support facilities which includes trip facilities and weather conditions

A larger percentage of respondents are dissatisfied with attributes relating to availability and adequacy of **support facilities** during the trip and at the end of the trip

Note: n = from 385 to 643



There is a significant opportunity to bring together stakeholders from across NSW to accelerate the delivery of initiatives based on priority and ownership

## ILLUSTRATIVE ONLY

Rank	Customer lens		Effort to deliver			Initiative type			Funding	Stakeholders responsible (R), accountable (A), consulted (C) and informed (I)				
	Ranked initiatives in order of share of importance	% Share of importance	Quick wins	Moderate	More challenging	Infrastructure & technology	Information & promotion	Policy & partnerships	Currently funded (Y) or not (N)	TfNSW	RMS	Local councils	Other State Government Departments	Other stakeholders
1	More direct routes	6.4%				✓				A	R	R	C	I
2	Programs that improve personal safety and security	5.6%				✓	✓	✓						
3	More pedestrian safety infrastructure	5.2%				✓								
4	Better connected footpaths to PT	4.8%				✓								
5	Improved connections of footpaths	4.4%				✓								
6	Promotion of health benefits	4.2%					✓	✓						
7	Increased enforcement of road rules	4.1%					✓	✓						
8	Complete shade or rain coverage	3.9%				✓								
9	Reduced speed in busy areas	3.7%					✓	✓						
10	More responsible sharing of paths	3.6%					✓	✓						
11	More pleasant routes	3.6%				✓		✓						
12	More comprehensive signage	3.6%				✓	✓							
13	Separated street space/lanes	3.5%				✓		✓						
14	Longer pedestrian signal phases	3.3%				✓								
15	Improved quality of footpaths	3.3%				✓		✓						

Example of initiative 'more direct routes' provided for illustrative purposes only

Responsible (who is responsible for actually doing it?); Accountable (who has authority to approve or disapprove it?); Consulted (who has needed input about the task?); Informed (who needs to be kept informed?)



There is a significant opportunity to bring together stakeholders from across NSW to accelerate the delivery of initiatives based on priority and ownership (cont.)

## ILLUSTRATIVE ONLY

Rank	Customer lens		Effort to deliver			Initiative type			Funding	Stakeholders responsible (R), accountable (A), consulted (C) and informed (I)				
	Ranked initiatives in order of share of importance	% Share of importance	Quick wins	Moderate	More challenging	Infrastructure & technology	Information & promotion	Policy & partnerships	Currently funded (Y) or not (N)	TfNSW	RMS	Local councils	Other State Government Departments	Other stakeholders
16	Promote mental and social benefits	3.2%				✓		✓						
17	More during trip facilities	3.2%				✓								
18	School based programs for parents/children	3.0%					✓							
19	Pedestrianisation of streets	2.9%					✓	✓						
20	Safety from left turning vehicles	2.8%				✓	✓	✓						
21	Campaigns on benefits of walking	2.8%					✓	✓						
22	Better trip planning info	2.8%				✓	✓							
23	More amenities at PT interchanges	2.6%				✓								
24	Directional flow lanes	2.5%				✓	✓	✓						
25	Encouragement of social benefits	2.5%					✓	✓						
26	Financial incentives	2.0%						✓						
27	Congestion charges	1.9%						✓						
28	Walking apps/website	1.7%					✓							
29	More walking events	1.5%					✓	✓						
30	More end of trip facilities	1.3%				✓								

Responsible (who is responsible for actually doing it?); Accountable (who has authority to approve or disapprove it?); Consulted (who has needed input about the task?); Informed (who needs to be kept informed?)





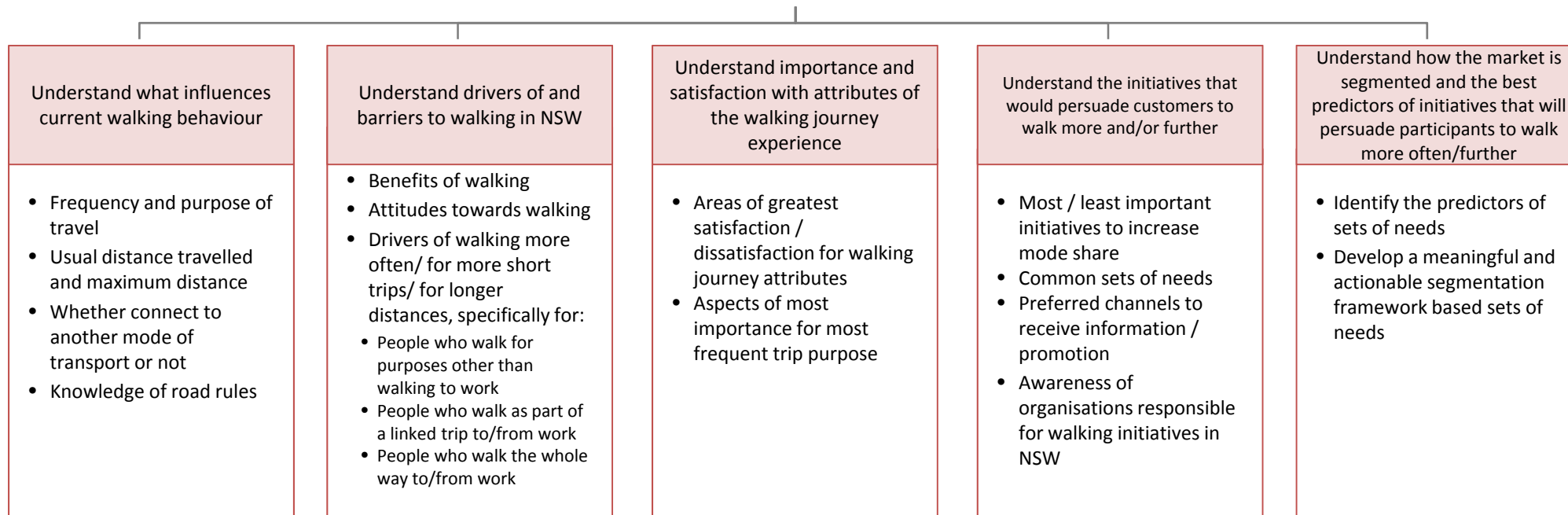
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# Why was the research conducted?

## 1. Overview of research

The Walking CVP research will provide a basis for the walking mode strategy and the initiatives to be rolled out from it

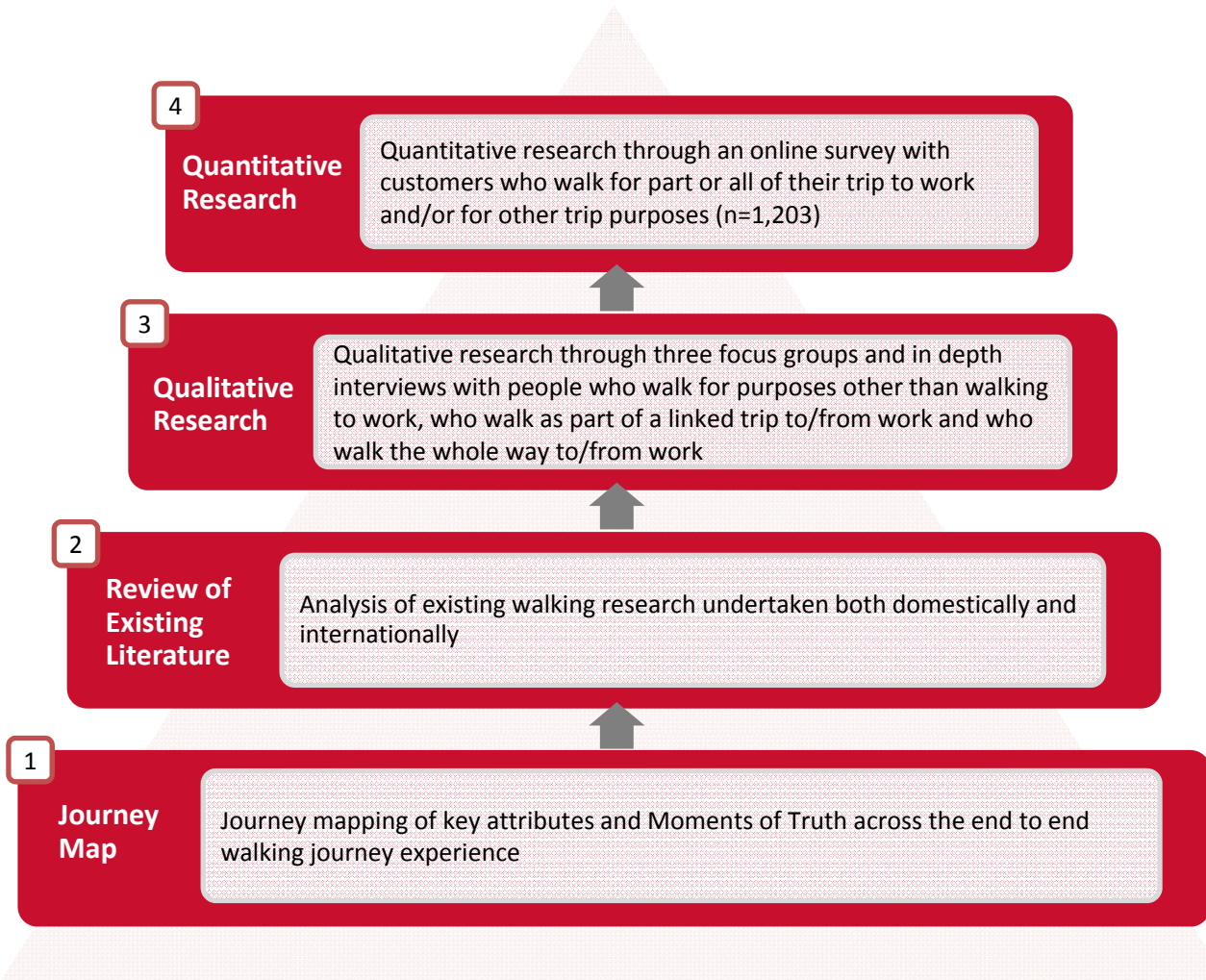
**Research Objective:** To identify important attributes and influential initiatives to persuade more people to walk more often/further and for different purposes in urban and regional NSW centres



The research will inform initiatives to achieve an increase in mode share to 25% (from 22.5%) in the Sydney metro region for local (5km) and district (10km) trips by 2016 (NSW 2021 – the State Plan)

The report is structured around insights from each of these four components

**Walking CVP research components**



**Sample output**

**Quantitative insights**

**Qualitative report**

**Summary of literature review**

**Journey maps**

Section 2-7  
Page 19-65

Appendix Page 8-12

Appendix Page 1-7

Section 4-6  
Page 41



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What influences walking travel behaviour in NSW?

## 2. Drivers and barriers

*Understanding the characteristics that influence travel behaviour identifying drivers and barriers towards walking in NSW for different purposes*

## INSIGHT: Those who walk for part of a linked trip to/from work differ in travel behaviour to those who walk the whole way to work and other trip purposes

	n=629 Walk most frequently for purposes other than trips to work	n=304 Walk as part of a linked trip to work	n=270 Walk the whole way to work
<b>Respondents</b>	73% of respondents indicated that they have walked for purposes other than walking to work (may also have walked for other purposes)	27% of respondents indicated that they have walked as part of a linked trip to work (may also have walked for other purposes)	16% of respondents indicated that they have walked the whole way to work (may also have walked for other purposes)
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<b>Time</b>	Median time they currently walk for is <b>15-20mins</b> but they feel they could walk for <b>25-30mins</b>	Median time they currently walk for is <b>5-10mins</b> but feel they could walk for <b>15-20mins</b>	Median time they currently walk for is <b>15-20mins</b> but they feel they could walk for <b>25-30mins</b>
<b>Drivers / barriers</b>	<p>Top <b>three most important reasons for choosing to walk</b> :</p> <ul style="list-style-type: none"> <li>• I gain physical health benefits</li> <li>• It is good for my emotional wellbeing and it helps me unwind</li> <li>• Walking offers me more flexibility and independence than any other transport mode</li> </ul>	<p>Top <b>three most important reasons for choosing to walk</b> :</p> <ul style="list-style-type: none"> <li>• It is the only way to access my public transport journey</li> <li>• I gain physical health benefits</li> <li>• Cost savings</li> </ul>	<p>Top <b>three most important reasons for choosing to walk</b> :</p> <ul style="list-style-type: none"> <li>• I gain physical health benefits</li> <li>• Cost savings</li> <li>• It is good for my emotional wellbeing and it helps me unwind</li> </ul>

Note: Respondents were asked about their most frequent trip purpose:

- Walk for purposes other than walking to work (n=629)
- Walk as part of a linked trip to work (n=304)
- Walk the whole way to work (n=270)

Note: n = 1,203

Source: Transport for NSW, Walking CVP Research, June 2013

For those who do not **walk for all or part of their trip to work**, the top three reasons for choosing **not to walk** for this purpose are:

- It is a long distance
- The terrain (e.g. too hilly, too bumpy etc)
- I am not motivated to walk (i.e. too much effort)

Other purposes than walk to work

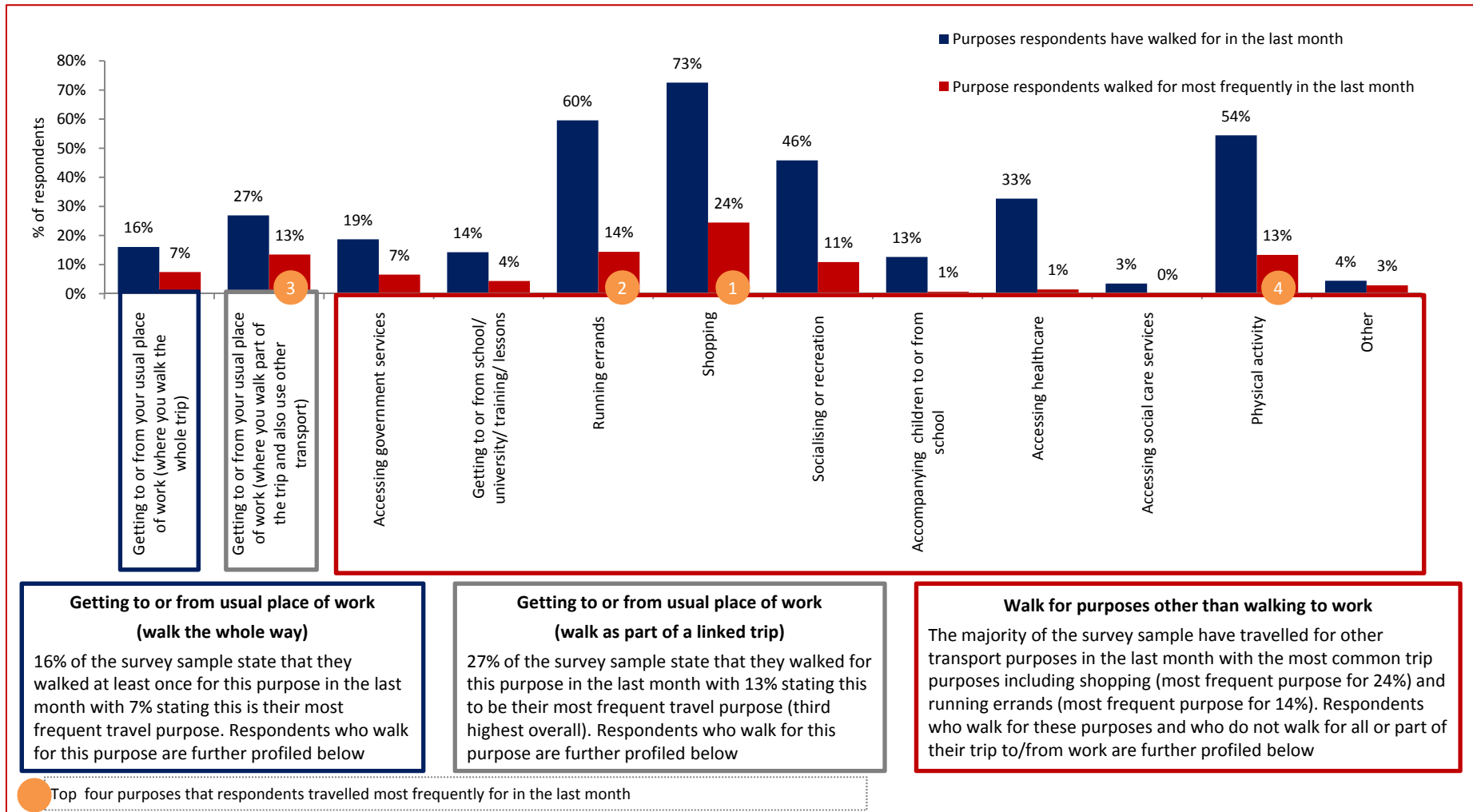
Linked walk trip to work

Walk only trip to work



## INSIGHT: Running errands, shopping, physical activity, socialising and recreation are the most common purposes that customers have walked for in the last month

Travel behaviour of all respondents in the last month



Note: n = 1,203

Source: Transport for NSW, Walking CVP Research, June 2013



Other purposes than walk to work

Linked walk trip to work

Walk only trip to work



# INSIGHT: Customers who live outside of Sydney SD, walk mostly for physical activity and do so every couple of days for distances of 3km or greater

n=629

## Profile of those who most frequently walk for purposes other than walking to work

More than **three quarters** of respondents **walked for purposes other than trips to work** in the last month. The most common purposes include:

**73%** of the survey sample walked for the purpose of **shopping** in the last month

**60%** of the survey sample walked for the purpose of **running errands** in the last month

**54%** of the survey sample walked for the purpose of **physical activity** with no transport purpose in the last month

**46%** of the survey sample walked for the purpose of **socialising or recreation** in the last month

### Who most frequently walks for purposes other than trips to work?

- **Age:** A higher proportion are 60 years of age or older compared to other groups (33%)
- **Gender:** Equal split of men to women
- **Region:** A higher proportion live outside Sydney SD (44%) with 13% living in the Mid North Coast, New England and Northern Rivers regions
- **Education:** Significantly higher proportion have lower levels of education (31% have secondary school or lower level of education)
- **Employment status:** Significantly higher proportion are retired (28%) or performing fulltime home duties (7%)
- **Income:** 24% have yearly household incomes less than \$30k per year
- **Children:** 80% do not have dependent children
- **Car ownership:** Likely to own a car (85%) and in general, do not believe that street space should be increased for walking at the cost of road space for cars

### When, where, how far and for how long do people usually walk for purposes other than walking to work?

- Walking for other trip purposes includes participants who most frequently walk for **shopping purposes** (22% of total survey population), **running errands** (13%), **physical activity** with no transport purpose (13%) and **socialising and recreation** (10%)
- Travel **every couple of days** (48%) on weekdays only (42%) or both **weekdays and weekends** and start their trip in the late morning (10am -12pm) (31%) and finish around lunch time or the late afternoon (12pm-5pm) (37%)
- The majority walk both on the **way there and the way back** (88.4%)
- For the purposes of running errands or shopping, respondents tend **to connect to** the bus (28%), train (26%) or the car (66%). Respondents on average identify they walk the whole way for 45.2% of trips taken across other purposes
- 68.8% walk 2km or less and on their way to their destination with a **median walking distance** between 1-2km. They could walk **2-3km** (median) for this purpose and this increases to **5-10km** amongst those who walk for physical activity
- **Median time walked** is 15-20 minutes when they are on their way to their destination
- 18% of those who walk for other trip purposes most frequently walk for **physical activity with no transport purpose**. Of these, 62% generally walk for 30 minutes or longer and 85% state that they feel that could reasonably walk 45 minutes or longer for this purpose
- 57.3% state they walk at a **moderate pace** and 24% at a fast pace

Note: n = 629

Source: Transport for NSW, Walking CVP Research, June 2013



**INSIGHT:** Those who walk most frequently for **physical activity** generally walk for this purpose every couple of days for thirty minutes or longer

n=114

**Profile of those who most frequently for physical activity with no transport purpose**

54% of the survey sample walked for the purpose of **physical activity** with no transport purpose in **the last month**

13% of **the total survey sample** walk **most frequently** for **physical activity** with no transport purpose. This accounts for 18% of those who walk for other trip purposes

**Who** most frequently walks for **physical activity with no transport purpose?**

- **Age:** Span all age groups with the majority aged 30-49 (63%)
- **Gender:** Slightly higher number are female (57%) compared to male (43%)
- **Region:** Span all regions (37% in Sydney SD, 25% in Illawarra, Newcastle & Central Coast) however compared to other trip purposes a significantly higher proportion live in other NSW regions (38%)
- **Education:** 41% have completed a University and/or Postgraduate degree
- **Employment status:** 40% are employed full time or part time, 27% are retired and 11% are performing full time home duties
- **Income:** Span all income levels with 72% recording under \$110k per annum in total household income
- **Car ownership:** Likely to own a car (87%) and in general, believe that getting more people walking is a great way to improve the health of the population and save costs (89%)
- **Travelling with others:** Slightly more agree that they prefer to walk by themselves (42%) than to walk with other people (31%)

**When, where, how far** and for **how long** do people usually walk for **physical activity with no transport purpose?**

- Majority travel **every couple of days** (48%) or every day on both **weekdays and weekends** (63%)
- 86% start their trip from **home** and in the morning (before 12pm) (57%) or in the afternoon / early evening (39% between 2-7pm)
- 81% usually walk between **1-5km** with the majority (68%) stating they feel they could reasonably walk **4km or further** for this trip purpose
- 62% generally walk for **30 minutes or longer** and 85% state that they feel that could reasonably walk **45 minutes or longer** for this purpose
- 47% identify that there is **some variation** (trip time varies by up to 15 minutes on different days) when walking for physical activity while 43% identify there to be little variation (no more than a few minutes on different days)
- Majority (65%) consider they walk at a **medium pace**

Note: n = 114

Source: Transport for NSW, Walking CVP Research, June 2013

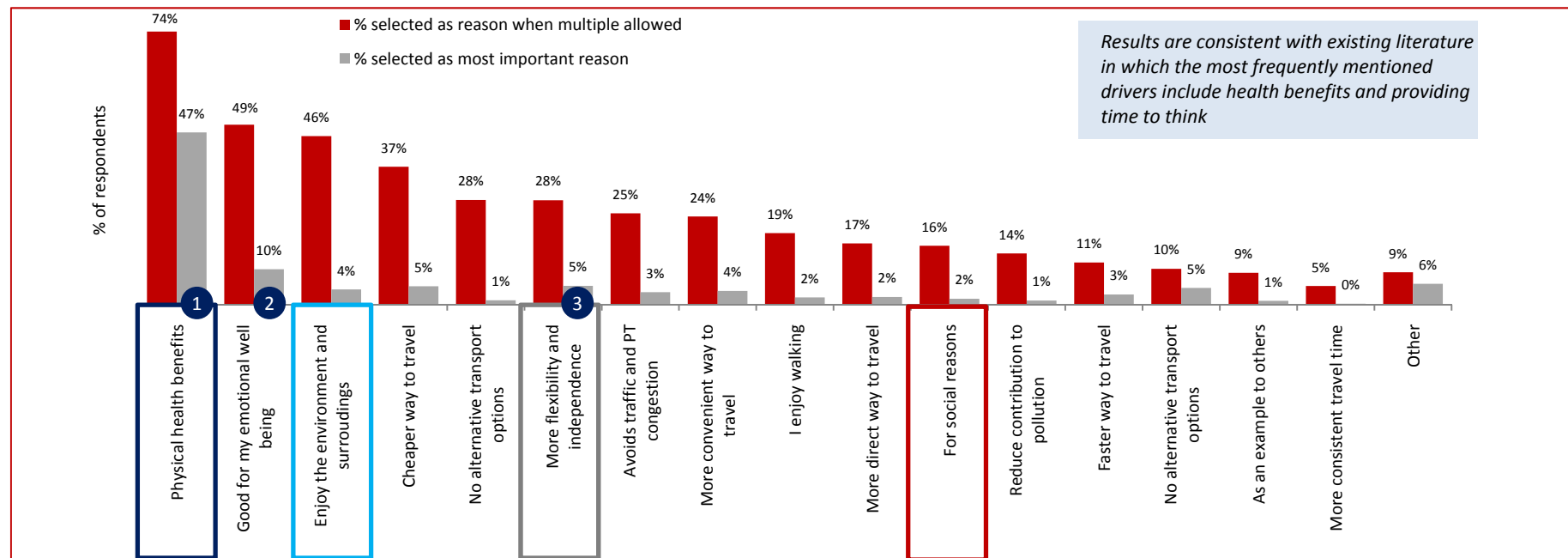




## INSIGHT: Key drivers for walking for purposes other than trip to work include health, well being and the environment

n=629

### Reasons for choosing to walk for purposes other than walking to work



**Notable differences:**

74% of those who walk for other purposes identify physical health benefits as a reason for doing so and 47% identify this as the most important reason. This is a more common reason for walking for **physical activity** (most important for 67%, while 20% selected **emotional well being** as the most important reason)

While 46% of those who walk for other purposes state this is one of the reasons they choose to walk, it is the most important reason for very few (4%). This is also a more common reason for choosing to walk for **socialising / recreation** or **physical activity** (reason for 60%; most important reason for 6%)

28% of those who walk for other purposes state they choose to walk for a specific purpose for this reason and 5% selected this to be the most important reason. This is also a more common reason for walking for **walking to/from school/university** and **shopping or running errands** (reason for 33%; most important reason for 8%)

More common reason for walking for the purpose of **socialising / recreation** however it is the most important reason for very few (reason for 35%; most important reason for 4%)

Top three reasons selected as most important reason respondents choose to walk for other transport purposes

Note: n = 629

Source: Transport for NSW, Walking CVP Research, June 2013

Other purposes than walk to work

Linked walk trip to work

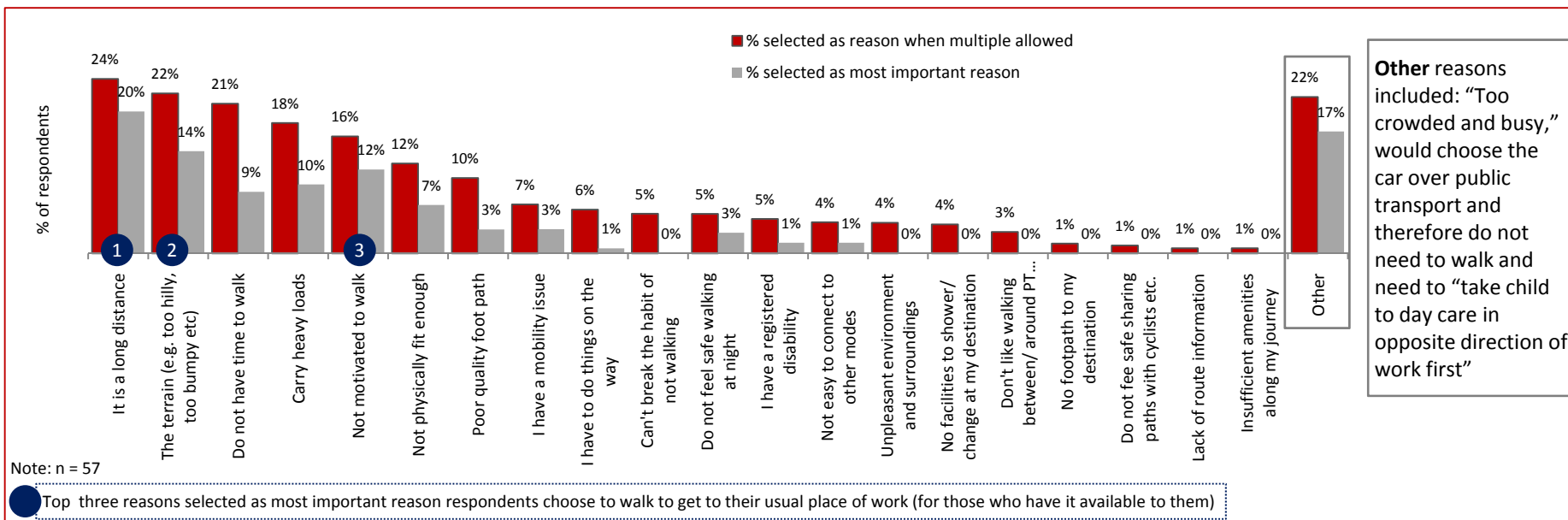
Walk only trip to work

DRAFT

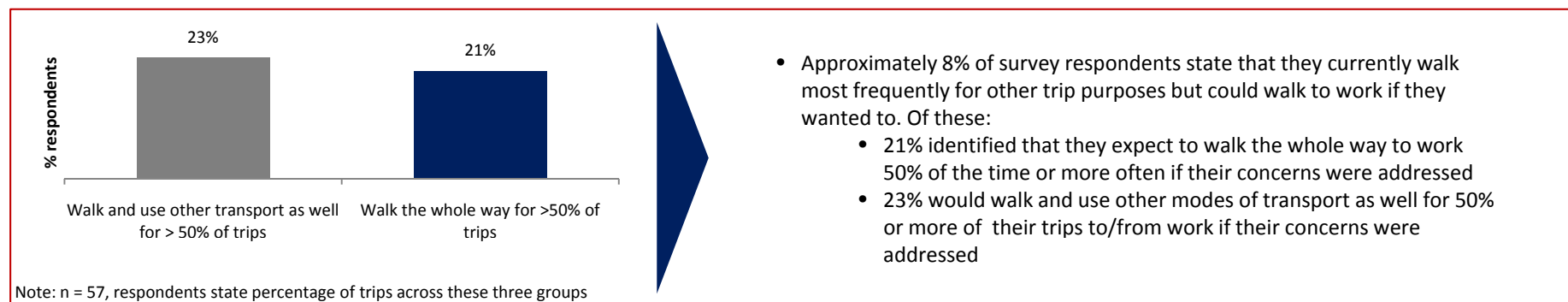


## INSIGHT: Key barriers to walking work for those that have this option available to them are time, terrain and lack of motivation

### Barriers to walking to work<sup>1</sup>



### Proportion of trips to/from work that respondents would walk for if their concerns were addressed



Note<sup>1</sup>: For those who walk most frequently for other trip purposes but could walk to work if they wanted to, why did you choose not to walk in getting to your usual place of work? (QC5)

Other purposes than walk to work | Linked walk trip to work | Walk only trip to work



## INSIGHT: Customers who walk to work as part of a **linked trip** tend to live in Sydney SD, live 5km+ from their work and do not have car parking available at work

n=304

### Profile of respondents who walk as part of a linked trip to/form work

27% of respondents walked as part of a linked trip to/from work in the last month and 14% walk primarily for this purpose.

#### Who usually walks for this purpose?

- Significantly higher proportion are **<40 years** of age (65%)
- Equal proportion are **male** (52%) compared to female (48%)
- Significantly higher proportion live in **Sydney SD** (73%)
- Significantly higher proportion have achieved a **university degree** or higher qualification (48%)
- Significantly higher proportion are **employed full time** (63%)
- Significantly higher proportion have a yearly household income of **\$90k +**(49%)
- 79% do not have dependent children
- 81% **own a car** and a significantly higher proportion (48%) **do not have car parking available at work** (paid or unpaid) compared to those who walk most frequently for other purposes and 19% have parking available which they can pay for themselves
- Compared those who walk the whole way to work and for other trip purposes a significantly higher proportion **live more than 5km their nearest town** (40%) and a significantly higher proportion also **live 5-10km from their work** (21%) or 10km or further (58%)

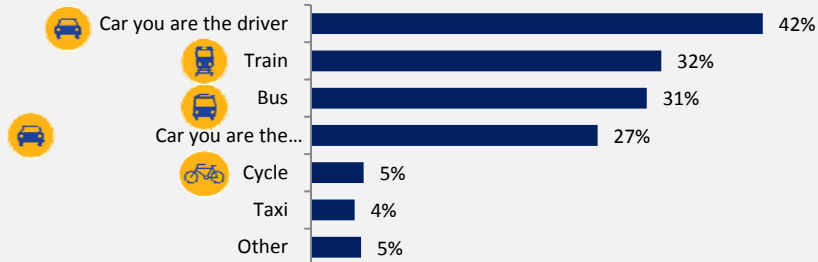
#### When and where do people usually walk for this purpose?

- Generally **travel on weekdays only** (82%) and start their trip in the early morning before 9am (93%) and finish in the evening between 5pm and 7pm (52%)
- The majority start their trip from home (77%) and **walk on the way there and the way back** (86%) with an equal split (32% each side) of people saying the walk before their connecting mode is longer than the walk after
- 62% of those who start their journey from home also identify **home** as the location where the longest part of their walking journey starts while the other 38% most commonly identify work and the train station as the location from which the longest part of their walking journey starts

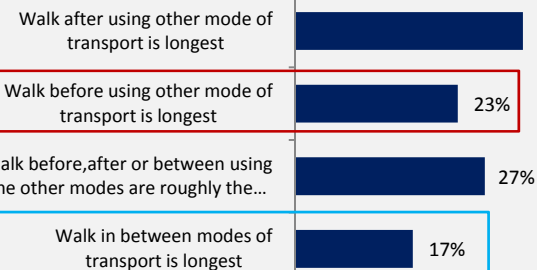
#### How far and for how long do people usually walk for this purpose?

- 58% **currently walk 1km or less** and 29% between 1-2km on their way to their destination with 76% feeling they could walk up to 2km
- Median time walked by respondents is **5-10 minutes** with 78% walking for up to 15 minutes. The median time for which respondents state they could walk for this purpose is 15-20 minutes
- 56% say they are **walk at a moderate pace** and 34% a fast pace
- 78% identified that there is generally **little variation** in their trip time

What other modes of transport do you also usually connect to when you walk for a linked trip to work (QB13)?



The longest part of their trip (before, during or after connection)



Of those whose walk before using another mode is longest, a significantly higher proportion connect to a **train** (47%)

Of those who walk in between modes of transport is longer, a significantly higher proportion connect to **car where they are the driver** (63%). Of public transport modes, the greatest proportion connect to a **bus** (26%)

Note: n = 304

Source: Transport for NSW, Walking CVP Research, June 2013

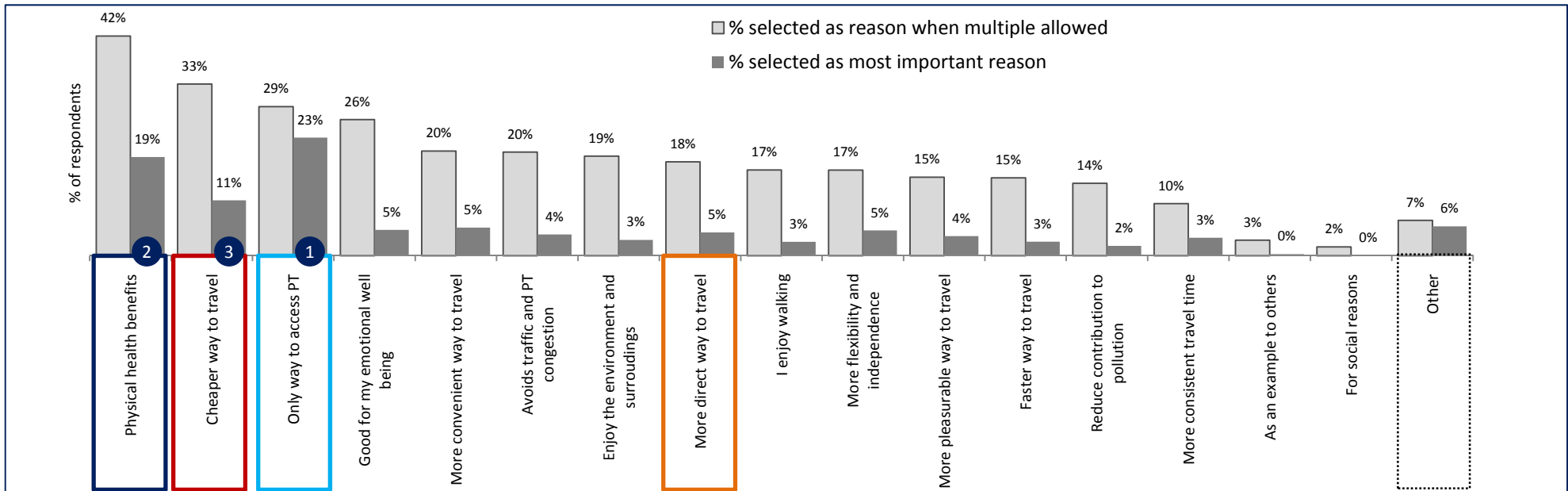
Other purposes than walk to work  
 Linked walk trip to work  
 Walk only trip to work



## INSIGHT: Key drivers for walking to work as part of a **linked trip** are to access public transport, health benefits and cost savings

n=304

Reasons for choosing to walk as part of a linked trip to/from work



**Notable differences:**

42% of those who walk as part of a linked trip to work identify physical health benefits as a reason for walking for this purpose however this is the most important reason for only 19%

33% of those who walk as part of a linked trip to work identify that it is a cheaper way to travel as a reason for doing so and 11% identify this as the most important reason. This is also a more common reason for choosing to walk by those who connect to **public transport** (reason for 41%, most important reason for 13%)

While 29% of those who walk as part of a linked trip to work state this is one of the reasons they choose to walk, it is the most important reason for the highest proportion (23%). This is also a more common reason for choosing to walk by those who **connect to the train** (reason for 37% of train users; most important reason for 34% of train users)

18% of those who walk as part of a linked trip to work identify that walking is a more direct way to travel as a reason for doing so and 5% identify this as the most important reason. This is also a more common reason for choosing to walk by those who connect to **public transport** (reason for 23%, most important reason for 5%)

The majority of respondents who selected **other** stated that they tend to walk from where they park because it is the closest car park to their office that meets their needs (i.e. all day parking, free parking etc.). Of those who connect to a **car where they are the driver**, 16% selected this as a reason and 14% as the most important reason

Top three reasons selected as most important reason respondents choose to walk as part of a linked trip to/from work

Note: n = 335

**INSIGHT:** Customers who walk **the whole way to work** generally live in Sydney SD and walk 2km or less to reach their destination taking approximately 15-20 minutes

n=270

### Profile of respondents who walk the whole way to/from work

16% of respondents walked the whole way to/from work in the last month and 8% walk primarily for this purpose.

#### Who usually walks for this purpose?

- A significantly higher proportion are **<40 years** of age (60%) with nearly all under 60 (96%)
- Higher proportion are **female** (58%) compared to male (42%)
- 65% live in **Sydney SD**
- Significantly higher proportion have achieved a **university degree** or higher qualification (44%)
- Significantly higher proportion are **employed full time** (47%) or part time (20%)
- Even distribution of lower to higher yearly household incomes
- 78% do not have dependent children
- 74% **own a car**
- Significantly higher proportion live **2km or less from their nearest town** (53%)
- Significantly higher proportion **live less than 2km from their work** (56%) or between 2-3km (15%)

#### When and where do people usually walk for this purpose?

- Generally travel **every day** (60.3%) on weekdays only (62.5%) and **start their trip in the early morning** before 10am (73.5%) and **finish in the early evening** between 5pm and 7pm (42.1%)
- The majority **walk on the way there and the way back** (74.7%)
- Respondents estimate that on average they walk the whole way for 65.96% of their trips to/from work
- The majority of respondents who walk the whole way to work (69%) **start their trip at home** and usually **walk on the way there and the way back** while 10% start their trip at home and usually only walk on the way to work

#### How far and for how long do people usually walk for this purpose?

- 66% currently walk **2km or less** and the median **distance walked** is 1-2km. The median distance respondents felt they could walk for this purpose was 2-3km with 26% feeling they could walk further selecting 2-3km or 3-4km
- **Median time walked** for walking to work is 15-20 minutes with 79% walking for up to 25 minutes. The median time they could walk is 25-30 minutes
- 56% say they walk at a **moderate pace** and 35.2% a fast pace
- 83% identified that there is generally **little variation** in their trip time

Note: n = 270

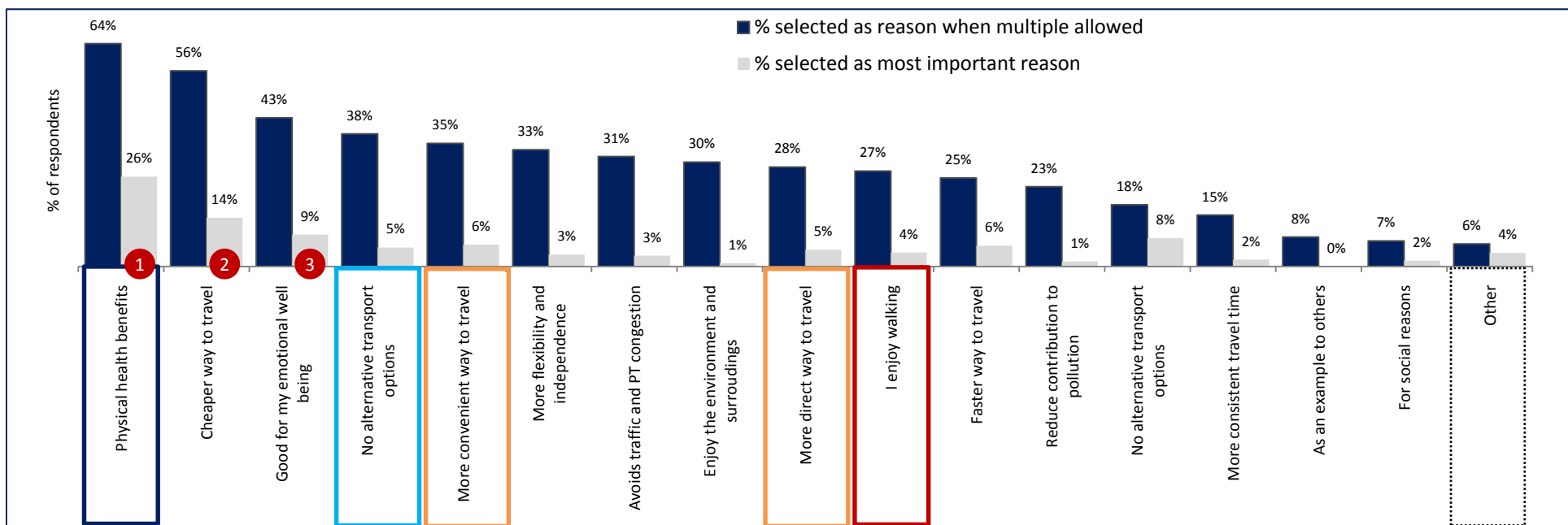


Transport for NSW

# INSIGHT: Key drivers for walking the whole way to work include health, well being and cost savings

n=270

## Reasons for choosing to walk the whole way to/from work



**Notable differences:**

64% of those who walk the whole way to/from work identify physical health benefits as a reason for walking and this is the most important reason for the largest proportion (26%). This is also a more common reason for those who generally travel **more than 1km** on their way to their destination (reason for 72%, most important for 32%)

38% of those who walk the whole way to/from work identify having no other transport options as a reason for doing so. This is also a more common reason for those who generally walk **less than 1km** to their destination (reason for 25%, most important reason for 15%)

More commonly selected reason for choosing to walk by those who generally travel **2km or less** on their way to their destination

More commonly selected reason for choosing to walk the whole trip by **early adopters** who agree that they are always the first to try new, more active ways of travelling (reason for 44%, most important reason for 5%)

The majority of respondents who selected **other** stated that they walk because they live too close to work such that any other transport option would not be reasonable. This is more common for those who walk **less than 2km** (9% selected as reason)

● Top three reasons selected as most important reason respondents choose to walk the whole way to/from work

Note: n = 270

## INSIGHT: Customers who walk to accompany a child to or from school generally have children aged 5-11 years old and live 2km or less from school

**What influences the travel behaviour of those with dependent children**

**n=162**

**Who usually walks for the purpose of accompanying children to school?**

- 21% of respondents have dependent children of which 63% have school aged children (5-16 years of age; 26% 5-8 years old, 22% 9-11, 27% 12-14 and 16% 15-16)
- 13% of respondents identified that they have walked for the purpose of accompanying a child to/from school in the past month. 1% identified this as their most frequent trip purpose
- Respondents (parents) who have travelled for this purpose in the last month are more commonly aged between 30-39 years (35%), have children aged 5-8 years old (54%) and/or 9-11 years old (44%), are slightly more likely to be female (57%) and are more likely to live in a separate or detached house (81%) compared to those who travel for other purposes

**When and how far do people usually walk to school?**

- 51% of those with dependent children live a distance of **2km or less from the school**
- 92% of those who have ever walked to drop off, pick up or accompany a child to school state that their child/children walk instead of using another mode of transport once a week or more often
- 75% of those who have ever walked for the purpose of dropping off, picking up or accompanying a child to or from school live less than 2km from their children's school

**% who have walked to accompany child to/from school by distance**

Of those who have walked for the purpose of dropping off, picking up or accompanying a child to/from school, % who live specified distance from school:

Distance	Percentage
5km or more	13%
2-5km	11%
1-2km	37%
1km or less	38%

**For what reasons do respondents usually walk/not walk their children to school?**

- A significantly higher proportion (18%) of those with dependent children identify **that acting as an example for others** (e.g. children, family and friends) is a reason they choose to walk in general compared to those who do not have dependent children (6%)
- When those with children who walk instead of using other modes of transport less than weekly were asked why their children do not walk more often, the most common reasons were that the **children do not have time to walk**, they feel their children are too young to walk to school unaccompanied and that their children carry heavy loads (e.g. books etc.). Note this is based on a small sample size (n=33)
- There were no significant differences in satisfaction and importance of attributes, attitudes and importance of initiatives between those who have dependent children and between those with children of different ages

Note: n = 146 with dependent school aged children

Source: Transport for NSW, Walking CVP Research, June 2013



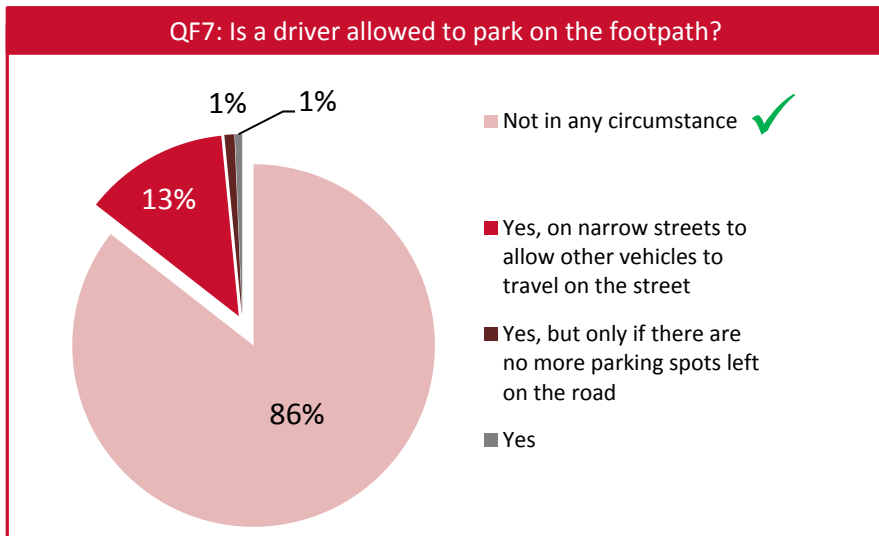


## 3. Knowledge and attitudes

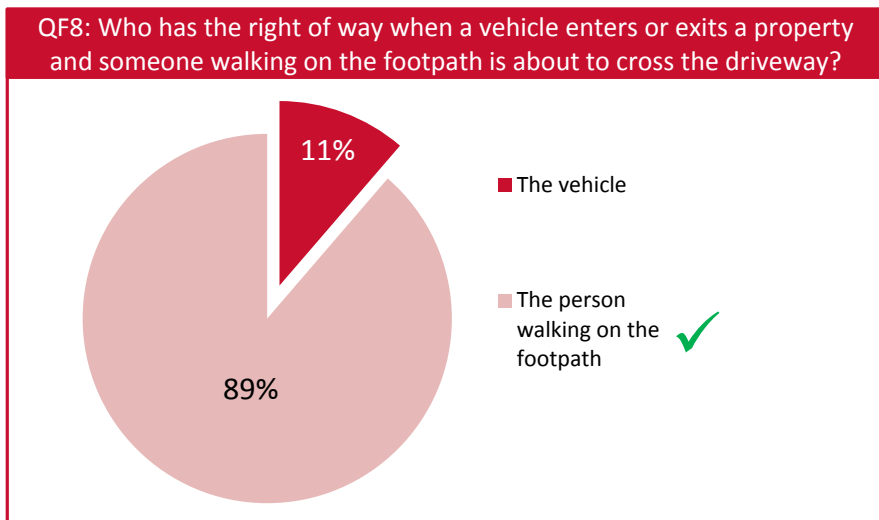
*Snapshot profile into customers knowledge of road rules, channel preferences for communications and whether they agree/strongly agree and disagree/strongly disagree with the attitudinal statements*



**CONCLUSION:** Majority of customers know that drivers are not allowed to park on footpaths and that the person walking has the right of way when crossing a driveway



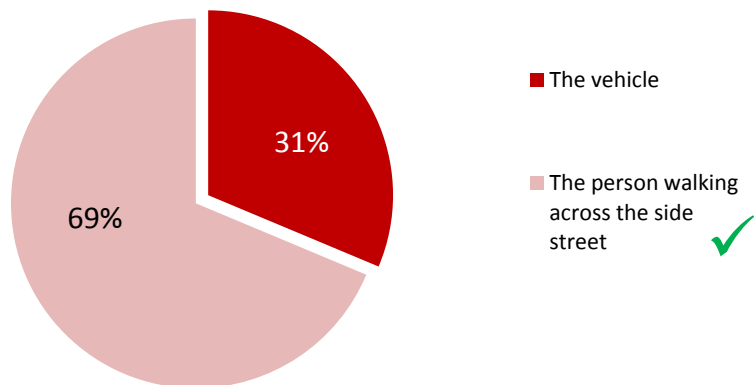
- Majority of respondents (86%) believe that drivers are not allowed to park on the footpath in any circumstance however, 13% of respondents believe that it is acceptable to park on narrow streets to allow other vehicles to travel on the street
- People who walk for different trip purposes know this road rule correctly with a correct response rate of 85-88%. There is a large percentage of people who walk for purposes other than walking to work (14%) who believe that drivers are allowed to park on the footpath on narrow streets
- The correct response rate is consistently high across genders (male:85%, female:86%) and regions (85-86%)
- Slight variability is observed among different age groups. Correct response rates are higher among respondents between the ages of 30 and 39 (91%) and lower among respondents between 50 and 59 (79%)



- Majority of respondents (89%) are correct in believing that the pedestrian has the right of way when a vehicle enters and exists a property, 11% believe the driver has the right of way
- The correct response rate is consistently high across genders (male:90%, female:88%), trip purposes (87-90%) and regions (85-90%)
- Compared to other age groups, a higher percentage of respondent above the age of 60 (93%) believe pedestrians have the right of way and a lower percentage of respondents between 25 and 29 (84%) provide the same correct response
- A slightly larger percentage of respondents who do not have a drivers license (17%) believe that the vehicle has the right of way when entering or exiting a property compared to 11% of those who do have a driver license

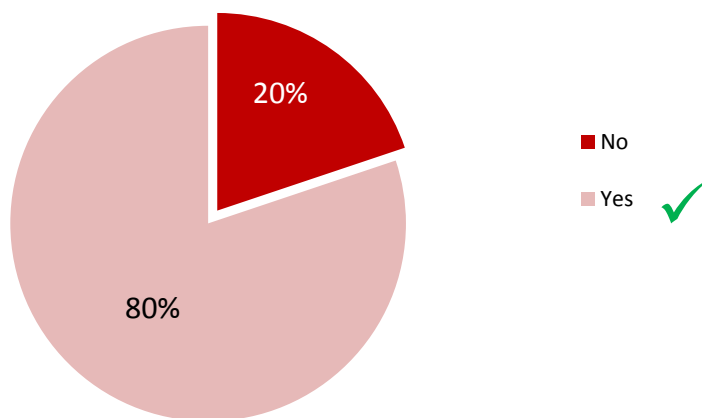
## CONCLUSION: A large proportion of customers do not know pedestrians have the right of way when crossing or on shared paths

QF9: Who has the right of way when a vehicle is making a left turn to a side street and a person is walking across the side street?



- In general, respondents show the weakest knowledge of the road rule regarding a pedestrian's right of way when crossing a side street while a vehicle is turning. The level of knowledge varies across geographical locations and trip purposes
- About two-third of respondents (69%) believe that the pedestrian has the right of way, while the rest (31%) believe the vehicle has the right of way
- The correct response rate is consistent across age groups (65-72%) and genders (male:71%, female:67%)
- Respondents living in Sydney (72%) and Illawara and Hunter region (70%) know this road rule better compared to respondents from regional areas (58%)
- A lower percentage of respondents who walk the whole way to/from work (63%) acknowledge that pedestrians have the right of way in the stated scenario compared to respondents who walk for other trip purposes (linked trip:74%, purposes other than walking to work (69%))

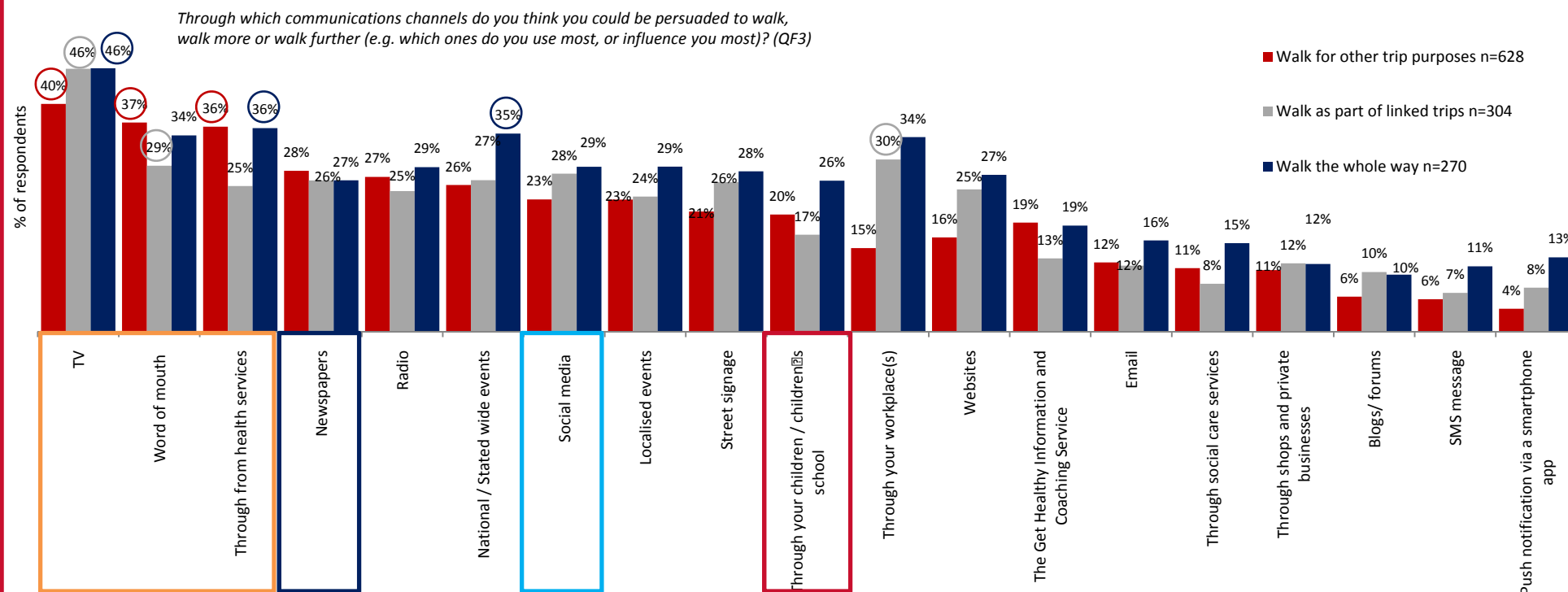
QF10: Do bicycle riders have to give way to pedestrians on, off road shared paths built for them?



- While majority of respondents acknowledged the need for bicycle riders to give way to pedestrians on shared paths, the level of knowledge varies across genders, trip purposes and age groups
- A lower percentage of respondents who walk the whole way to/from work (72%) acknowledge the need for bicycle riders to give way compared to respondents who walk for other trip purposes (linked trip:83%, other trip purposes:81%)
- The correct response rate is consistent across major regions (77-81%)
- More males (85%) than females (76%) believe that bicycle riders need to give way to pedestrians on shared paths
- A larger percentage of respondents under the age of 25 do not know this road rule correctly (72%) compared to other age groups (77-84%)

## INSIGHT: More customers think they could be persuaded to walk more/further through promotion of benefits on TV, word of mouth and health services

Communication channels by which respondents think they could be persuaded to walk, walk more or walk further (QF3)



Overall, **TV** (42%) is the most preferred communication channel for persuading respondents to walk more and/or further, followed by **word of mouth** through friends and families (35%) and **health services** (34%). Fewer respondents think they could be persuaded to walk, walk more or walk further through push notification via a Smartphone app, SMS message and blogs/forums are (less than 10%)

A higher proportion of respondents **over 60 years of age** believe they could be persuaded to walk more/further through promotion via newspapers (38%) compared to other age groups

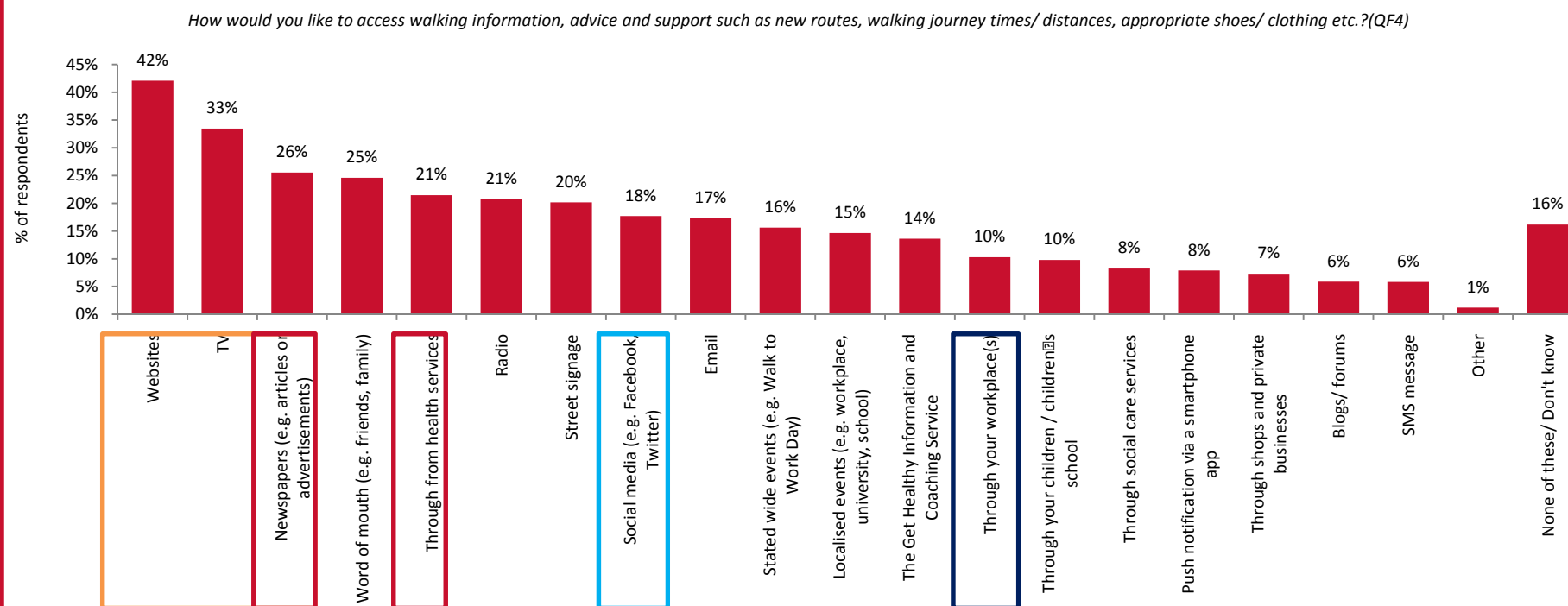
A higher proportion of those **below 30 years of age** think they could be persuaded to walk more/further through **digital channels** such as social media (36%) compared to those aged 60+ (12%)

A larger proportion of respondents **aged 30 – 59** think they could be persuaded to walk more often/further through **children / children's school** (27%; note that 36% of those aged 30- 59 have dependent children, which is significantly higher than other age groups)

○ Top three most commonly selected communications channels by which participants could be persuaded to walk (for each of the trip purposes)

## INSIGHT: More customers would like to access walking information, advice and support via websites, TV and newspapers

Communication channels by which respondents state they would like to access walking information, advice and support (QF4)



Overall, **websites** (42%) is the most commonly selected communication channel by which respondents would like to receive walking information, support and advice followed by **TV** (33%), **newspapers** (26%) and word of mouth (25%). Fewer respondents would like to access walking information/advice via a Smartphone app (6%) and/or blogs/forums (6%)

A significantly higher proportion of those who most often walk for **other trip purposes** would like to access walking information/advice via **newspapers** (28%) or through **health services** (24%) compared to those who walk most frequently for all or part of a linked trip to work

A higher proportion of those **under 30 years of age** would like to access information via **digital channels** such as social media (28%) compared to those aged 60+ (8%)

A significantly higher proportion of those who most often **walk the whole way to work** would like to access walking information, support and advice through their **workplaces** (16%) compared to those who travel for other trip purposes

Note: n=1,203



**CONCLUSION:** Analysis of variation in attitudinal statements amongst customers reveals three distinct attitudinal themes relating to speed, health, safety and environment and prioritisation of walking

#### Variation in respondents' attitudes by most frequent trip purpose, gender, age, geography and car ownership

Respondents who walk for **trip purposes other than walking to work** (i.e. recreation, social, accessing services etc.) prefer walking with other people than by themselves

**Females** tend to value the **environmental, health and wellbeing benefits** from walking more than males and have greater concerns about their personal safety and security while walking

Those **aged 60+** tend to be more **concerned about reducing speed limits** around busy centres and sharing paths with bicycle riders. They are more likely to be **community minded** and raise issues with relevant authorities if they see something wrong

Respondents who live in **regional NSW** appear to be more concerned about lack of footpaths than those who live in **Sydney SD**

**Car owners**, especially those that own 2 or more cars, do not believe that pedestrians should be prioritised whereas those respondents **without access to a car** believe that more street space should be made available for walking in order to reduce space for cars

#### Three key attitudinal themes emerge in the data

##### Speed averse

(42% of respondents)

- Show greatest differentiation with their attitudes towards **speed limits**, supporting reducing speed limits around schools and in busy city / town centres
- Tend to share similar views to some of the 'cautious pedestrians' who believe that it is a **safety concern** that pedestrians have to share street space with other road users and with pioneering pedestrians in believing that pedestrians should take priority
- More likely to be **40 years of age or older** (63%) and travel most frequently for the purposes of **shopping and running errands** (45%)

##### Health, environment, safety and security aware

(23% of respondents)

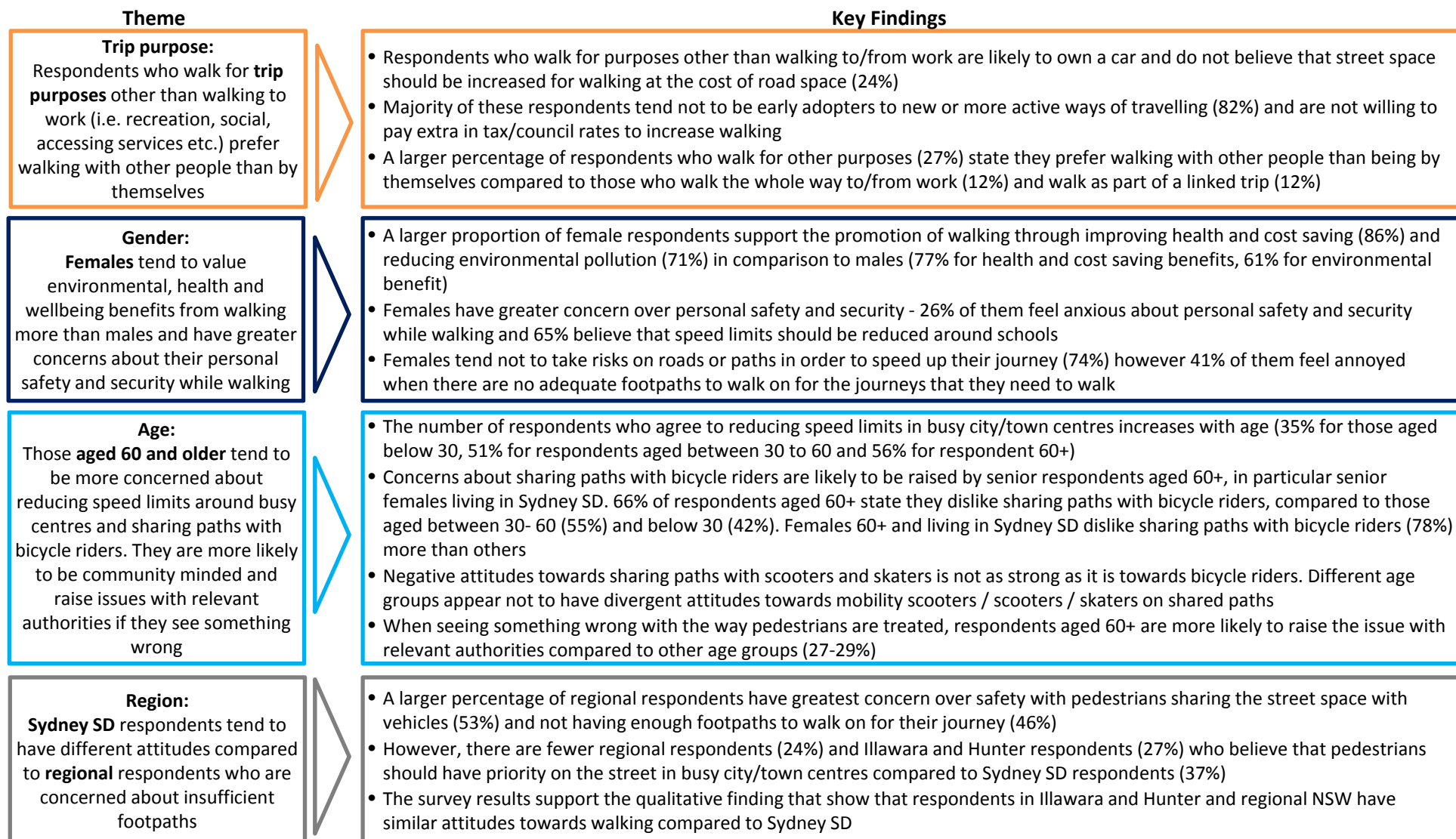
- Express greatest **concern with safety and security** while walking, **sharing street space** with others and not having sufficient footpaths for them to walk on
- Are generally **opinion followers** in their attitudes towards walking
- More likely to live in **Outer Sydney** regions (27%) compared to other attitudinal groups and to be a **car owner** (83%)

##### Supportive of prioritising walking

(35% of respondents)

- Appear to show the greatest differentiation with **support for congestion charges**, increased taxes to support infrastructure improvements and prioritisation of pedestrians in busy towns / centres
- Are predominantly your **opinion leaders**, believe in **contributing to assist pedestrians through taxes** and believe pedestrians should be given priority over cars
- Are supportive of campaigns to persuade people about the benefits of walking to the transport system

## INSIGHT: Customers' attitudes towards walking primarily vary by most frequent trip purpose, gender, age and region



## INSIGHT: Customers' attitudes towards walking differ among car ownership but little difference is evident across family structure, income, employment industry and distance

### Theme

### Key Findings

#### Car ownership:

**Car owners**, especially those that own 2 or more cars, do not believe that pedestrians should be prioritised whereas those respondents **without access to a car** believe that more street space should be made available for walking in order to reduce space for cars

- A larger percentage of car owners believe there is no need to reduce speed limits around schools (21%) or busy city/town centres (22%), while around 10% of respondents who do not have access to a car state the same
- A higher proportion of respondents having 2 or more cars do not believe that pedestrians should have priority on streets in busy cities/town even if it means less space
- Car owners are more unlikely to support a congestion charge in busy city/town centres (47%) compared to car users (36%) and those who do not have access to a car (23%)
- Respondents without access to a car prefer more street space for walking if this would result in less road space for cars (41%) however only 21% of car owners support this
- Respondents without access to a car or a drivers license tend not to have negative attitudes towards the option of paying higher taxes/ council rates for building or upgrading footpaths sooner (31% of those disagree) while more than half of car owners or users (51%) reject this option
- Results show that attitudes towards walking do not appear to differ among those respondents who have car parking available at their workplace (paid by employers or themselves) and those who do not have

#### Family structure / employment:

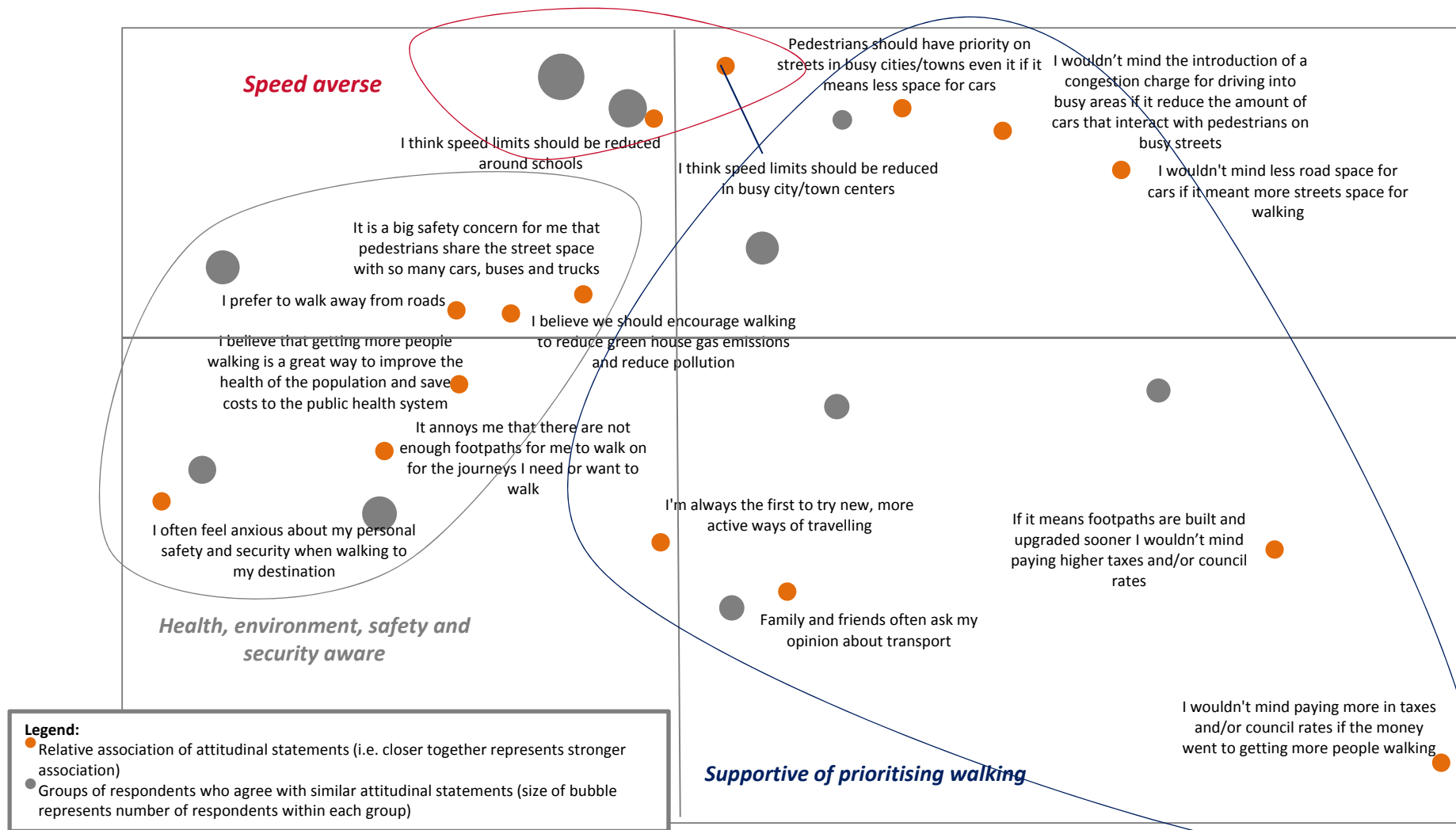
The differences in attitudes towards reduction of speed limits across respondents with different **family structures** and **employment industry** are insignificant

- A larger proportion of parents with dependent children support the reduction of speed limits around schools (66%) compared to those who do not have dependent children (58%), however this difference is not statistically significant
- Fewer state government employees support the reduction of speed limits in busy towns/centres (39%) and giving pedestrians priority on streets in busy cities/towns even if it means less space for cars (28%) compared to those employed in other industries - however, the differences are insignificant

Results indicate that there is no significant divergence in attitudes towards walking across respondents with different household incomes, employment industry, family structures, distance from work, town centre or propensity to walk



## CONCLUSION: Analysis of agreement with attitudinal statements reveals three groups of customers with similar attitudes towards walking, captured as attitudinal themes





## INSIGHT: Customers who are more health, environment, safety and security aware and those who support prioritising walking appear to have opposing attitudes towards walking

Analysis of the attitudinal statements shows the following...

<p>Three key attitudinal themes emerge in the data (1) speed averse, (2) health, environment, safety and security aware and (3) supportive of prioritising walking</p>	<ul style="list-style-type: none"> <li>• There is a strong attitudinal dimension that runs through the walking study. At one end, there are those who are more cautious and safety concerned and at the other end, there are those who are pioneering in their attitude to investing and regulating for the benefit of walking</li> <li>• Those who <b>strongly support prioritising walking</b> appear to show the greatest differentiation with support for congestion charges, increased taxes to support infrastructure improvements and prioritisation of pedestrians in busy towns / centres. This group are predominantly your <b>opinion leaders</b>, they believe in <b>contributing to assist pedestrians through taxes</b> and believe pedestrians should be given priority over cars</li> <li>• Those who are <b>health, environment, safety and security aware</b> express greatest <b>concern with safety and security</b> while walking, sharing street space with others and not having sufficient footpaths for them to walk on. This group show non agreement with opinion leadership towards walking</li> <li>• Those who are <b>speed averse</b> showed greatest differentiation with their attitudes towards speed limits, showing support for reducing speed limits around schools and in busy city / town centres</li> </ul>
<p>Respondents who are more health, environment, safety and security aware and those who support prioritising walking appear to have opposing attitudes towards walking, although sub groups emerge between the speed averse and other segments</p>	<ul style="list-style-type: none"> <li>• Those who strongly support prioritising walking appear to support higher taxes to benefit pedestrians in terms of footpaths, upgrades and encouraging more people to walk while those who are health, environment, safety and security aware feel anxious about their personal safety and security while walking and are annoyed by the lack of footpaths for them to walk on and yet do not support the idea of increasing taxes to fund improvements</li> <li>• Those who are <b>speed averse</b> tend to share similar views to some of those who are more health, environment, safety and security aware who believe that it is a safety concern that pedestrians have to share street space with other road users and who prefer to walk away from the road</li> <li>• Some of those who are more <b>speed averse</b> share similar views to the less extreme supporters of prioritising walking who believe that pedestrians should have priority in busy cities/ towns and who support a congestion charge to reduce the number of cars driving near pedestrians – all relating to speed aspects of the walking experience and the <b>belief that pedestrians should take priority</b></li> </ul>
<p>Community consciousness appears not to be a key differentiator across segments</p>	<ul style="list-style-type: none"> <li>• Across all three segments identified, ‘Improve the health of the population and save costs’ and ‘Reduce green house gas emissions and reduce pollution’ statements appear to be supported, suggesting that these community concerns and <b>promotion of walking benefits</b> is important to all community members (irrelevant of their attitudinal bias)</li> </ul>
<p>A two pronged approach to the attitudinal analysis needs to be considered</p>	<ul style="list-style-type: none"> <li>• In analysing the data, two lenses need to be adopted , the first relating to a general profile of attitudes and how they differ across the respondent base and the second seeks to identify underlying attitudinal segments in the data:             <ol style="list-style-type: none"> <li>(1) Profiling of respondents across their agreement / disagreement with the attitudinal statements to identify key trends</li> <li>(2) Latent Class Segmentation analysis to identify attitudinal themes</li> </ol> </li> </ul>



Transport  
for NSW

**INSIGHT:** Attitudinal themes differ based on age, most frequent trip purpose, region and car ownership

<b>Speed averse</b> <i>(42% of respondents)</i> "I think speed limits should be reduced around schools and in busy city/town centers"	<b>Health, environment, safety and security aware</b> <i>(23% of respondents)</i> "I often feel anxious about my personal safety and security... I prefer to walk away from roads"	<b>Supportive of prioritising walking</b> <i>(35% of respondents)</i> "Pedestrians should have priority... I wouldn't mind less road space for cars if it meant more street space for walking"
<b>How am I different to other groups? (Statistically significant differences between attitudinal groups)</b>		
<ul style="list-style-type: none"> <li>• <b>Age:</b> More likely to be 40 years of age or older (63%)</li> <li>• <b>Trip purpose:</b> More likely to most frequently travel for the purpose of shopping and running errands (45%) and less likely to walk for physical activity with no transport purpose most often (9%)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Region:</b> More likely to live in Outer Sydney regions (27%) compared to other attitudinal groups</li> <li>• <b>Car ownership:</b> 83% own a car, which is more than other groups (56% own 1 car and 18% 2 or more cars)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Trip purpose:</b> Less likely to walk for the purposes of shopping and running errands compared to other attitudinal groups (31%)</li> </ul>
<b>Who am I? (Profile of attitudinal groups by demographics where differences are not significant)</b>		
<ul style="list-style-type: none"> <li>• <b>Gender:</b> Both female (54%) and male (47%)</li> <li>• <b>Employment:</b> Employed full time (26%), retired (23%), employed part time (13%), student (12%)</li> <li>• <b>Region:</b> Span all regional groups including slightly higher proportion in Regional NSW (23%) and Sydney SD (62%)</li> <li>• <b>Car ownership:</b> 73% own a car</li> <li>• <b>Children:</b> 79% do not have dependent children. Those with dependent children are more likely to have children over 18 years of age</li> <li>• <b>Industry:</b> 60% work in the private sector</li> <li>• Median <b>time</b> could reasonably walk for: 15-20 mins</li> <li>• Median <b>distance</b> could reasonably walk for: 2-3km</li> <li>• Median <b>distance</b> from work: 4-5km</li> <li>• Median <b>distance</b> from nearest town/city: 5-10km</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Age:</b> Span all age groups</li> <li>• <b>Gender:</b> Both female (50%) and male (50%)</li> <li>• <b>Employment:</b> Employed full time (36%), retired (22%), employed on a casual basis (10%)</li> <li>• <b>Trip purpose:</b> Span a variety of trip purposes with fewer (22%) walking for the purpose of walking to work (via linked or single walk trip), though the difference is not significant</li> <li>• <b>Children:</b> 79% do not have dependent children</li> <li>• <b>Industry:</b> 56% work in the private sector</li> <li>• Median <b>time</b> could reasonably walk for: 20-25 mins</li> <li>• Median <b>distance</b> could reasonably walk for: 2-3km</li> <li>• Median <b>distance</b> from work: 4-5km</li> <li>• Median <b>distance</b> from nearest town/city: 5-10km</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Age:</b> Span all age groups with a higher proportion aged 30-39 (24%)</li> <li>• <b>Gender:</b> Both female (47%) and male (53%)</li> <li>• <b>Employment:</b> Employed full time (31%), retired (17%), employed part time (13%), student (12%)</li> <li>• <b>Region:</b> More likely to live in Sydney SD (63%)</li> <li>• <b>Car ownership:</b> 69% own a car</li> <li>• <b>Children:</b> 80% do not have dependent children</li> <li>• <b>Industry:</b> 62% work in the private sector</li> <li>• Median <b>time</b> could reasonably walk for: 15-20 mins</li> <li>• Median <b>distance</b> could reasonably walk for: 2-3km</li> <li>• Median <b>distance</b> from work: 4-5km</li> <li>• Median <b>distance</b> from nearest town/city: 2-3km</li> </ul>

What is satisfactory, unsatisfactory and important to the NSW population?





Transport  
for NSW

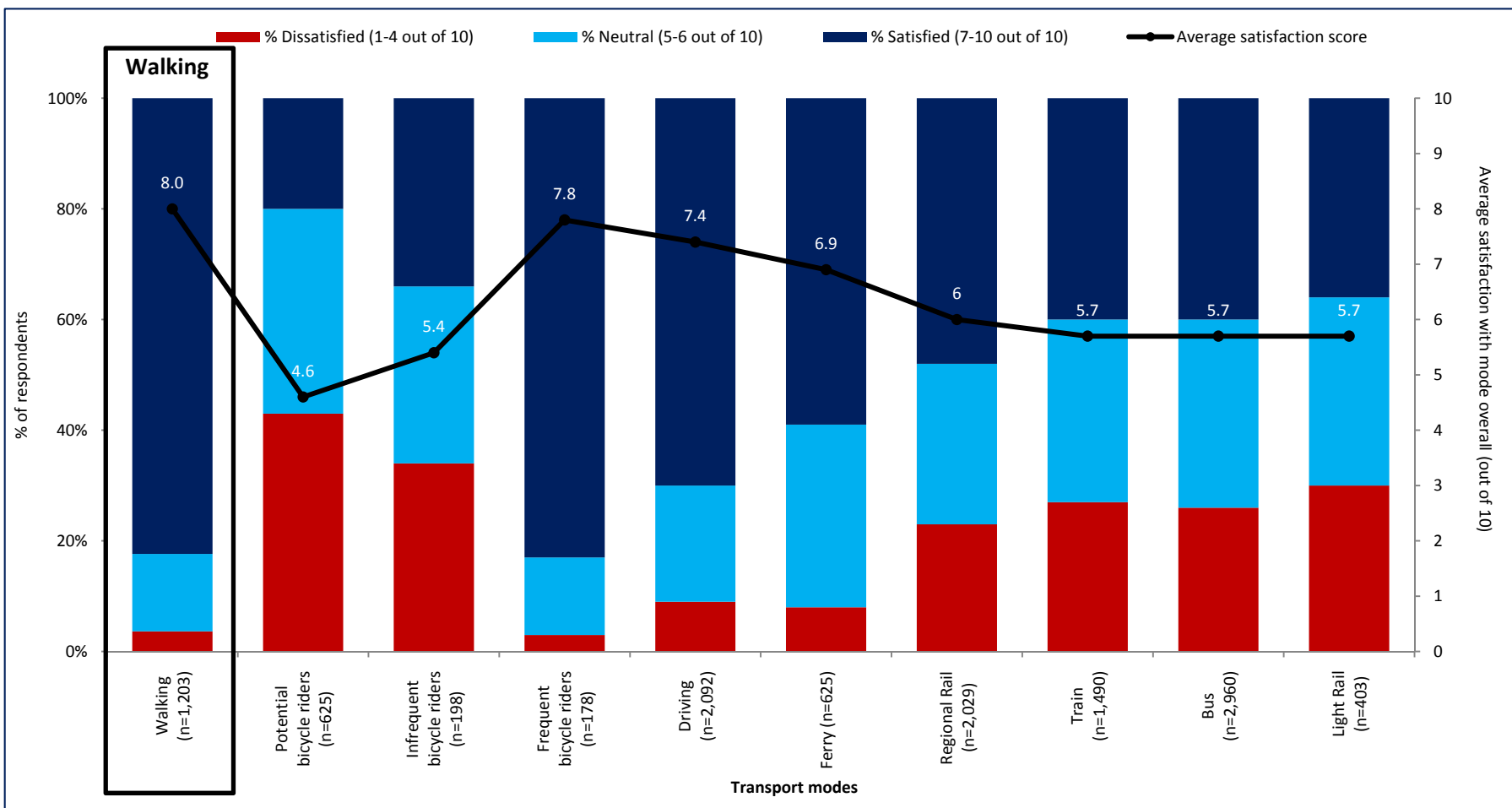
## 4. Satisfaction

*Satisfaction levels provide insight into possible improvements across the walking journey experience*



**INSIGHT:** Overall satisfaction for walking is significantly higher than most other transport modes

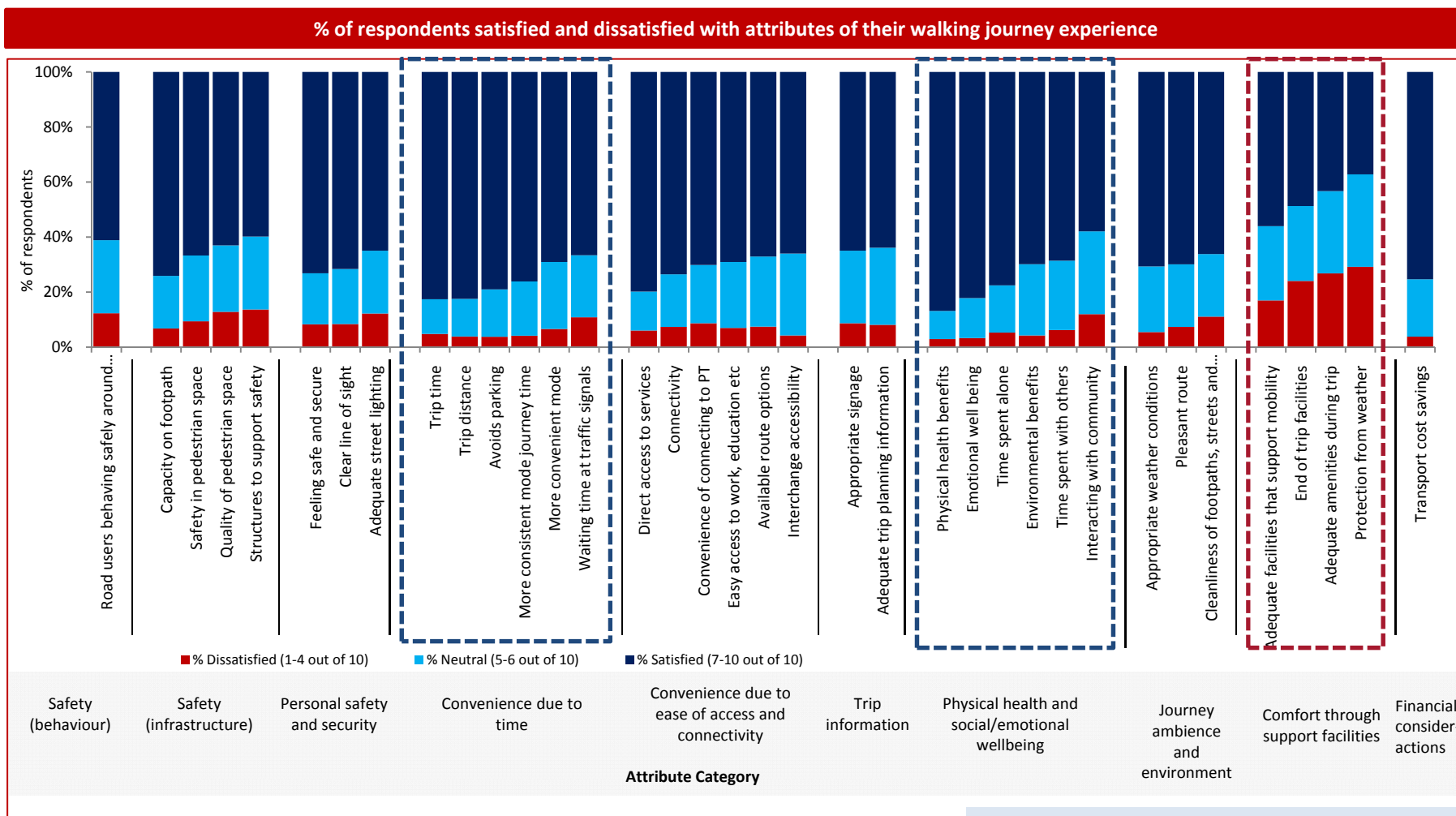
Overall satisfaction with walking (QD1) compared to other modes of transport



Source: Transport for NSW, Walking CVP Research, June 2013



## INSIGHT: Satisfaction is lowest with availability and adequacy of support facilities available during and after the walking journey experience



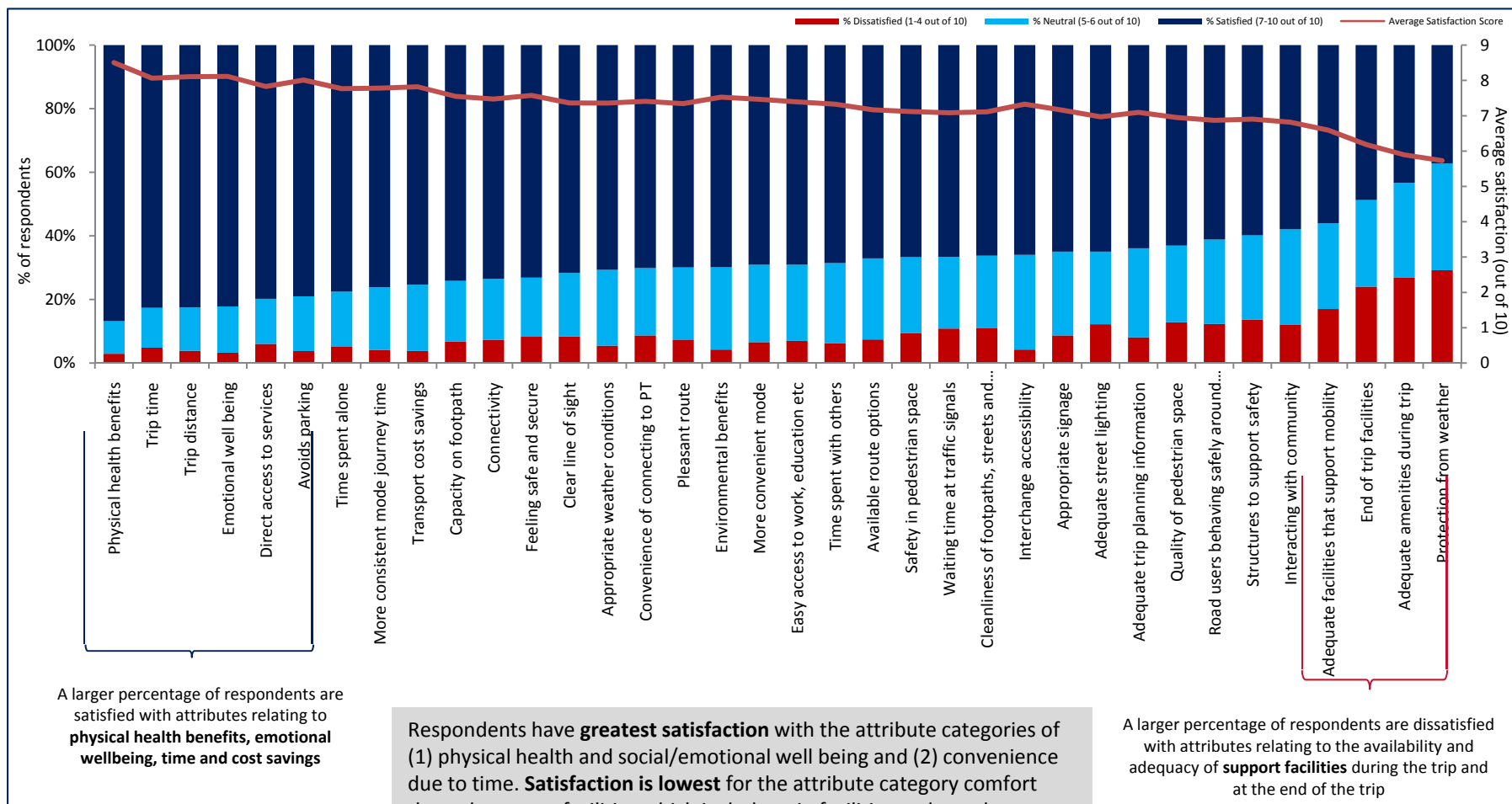
Note: n = from 385 to 643

Most people are satisfied with attributes within the category of **physical, social and emotional wellbeing** and they are consistently identified as primary drivers



## INSIGHT: More customers are most satisfied with the physical health benefits, emotional wellbeing, time and cost savings of walking

**% of respondents that are satisfied and dissatisfied with attributes of their walking journey experience (QD4)**

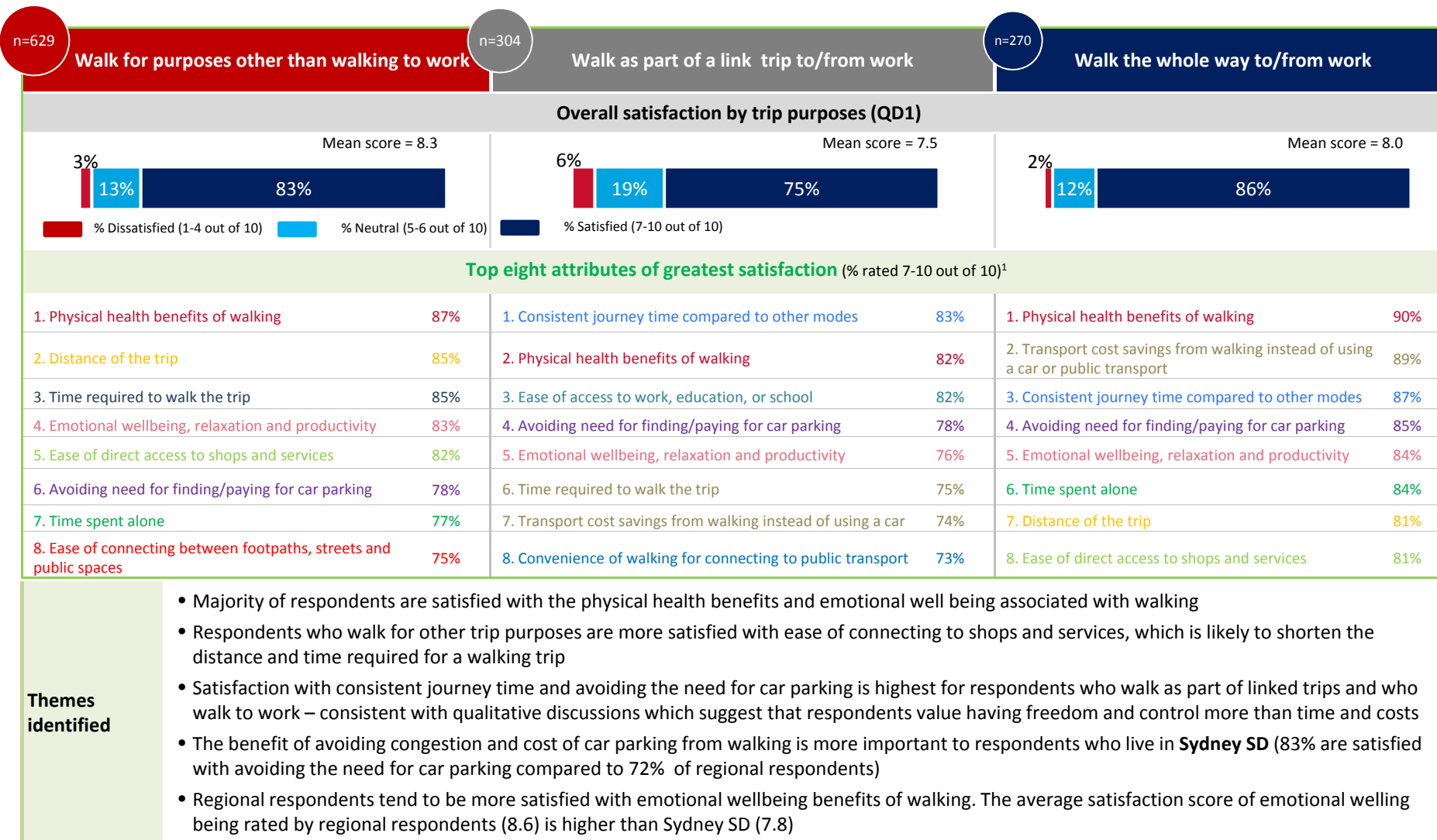


Note: n = from 385 to 643

Source: Transport for NSW, Walking CVP Research, June 2013



## INSIGHT: Customers have the greatest consistent satisfaction levels with the physical health benefits and emotional well being of walking



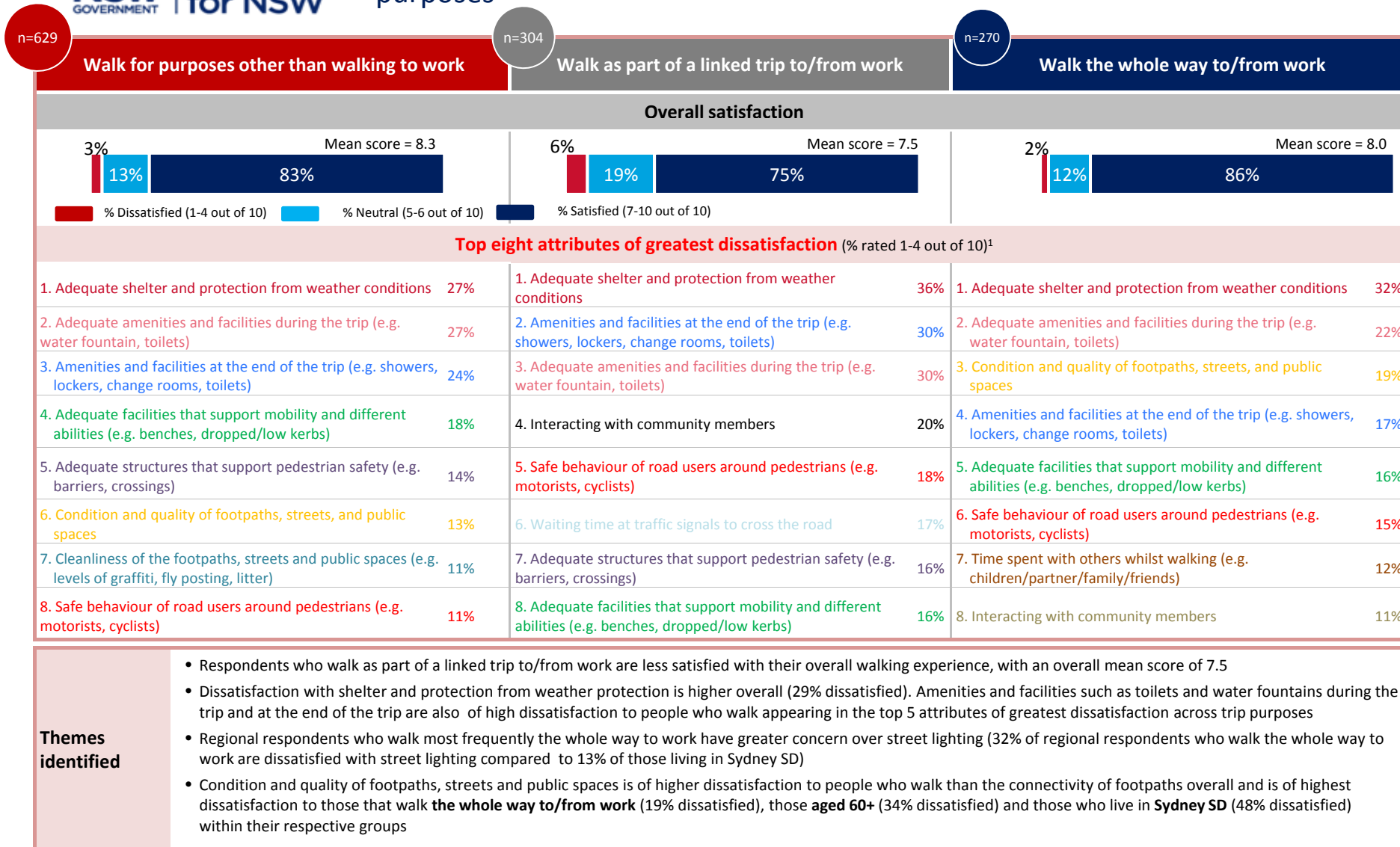
<sup>1</sup>Note: The top eight attributes of greatest satisfaction have been colour coded to show variation across trip purposes

Source: Transport for NSW, Walking CVP Research, June 2013





# INSIGHT: Impact of the weather and lack of facilities during and after walking trips are attributes with the greatest dissatisfaction across all trip purposes



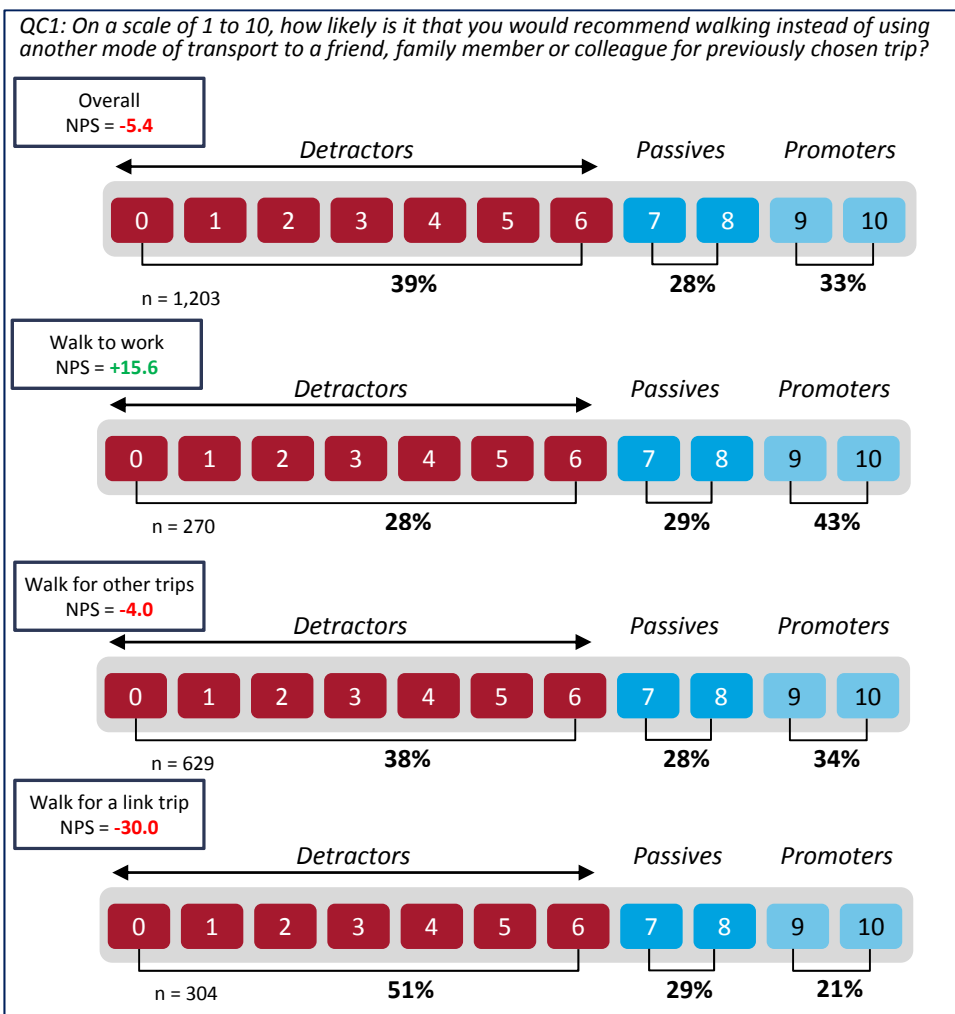
<sup>1</sup>Note: The top eight attributes of greatest dissatisfaction have been colour coded to show variation across trip purposes

Source: Transport for NSW, Walking CVP Research, June 2013



**INSIGHT:** Net promoter scores (NPS) shows that customers who walk as part of linked trip to work are least likely to recommend walking

**Net promoter scores (NPS) across the population (QC1)**



Source: Transport for NSW, Walking CVP Research, June 2013

**What do these NPS scores mean...?**

NPS has been calculated as :

**% Promoters - % Detractors**  
(9-10)      (0-6)

- Overall NPS score for all people who walk is **-5.4**
  - This negative NPS is a result of a higher number of detractors or unhappy customers (39%) versus lower number of promoters or loyal customers (33%) identified in the sample
- NPS scores varies depending on the trip purpose:
  - For who walk the whole way to/from work: NPS = **+15.6**
  - For who walk as part of a linked trip to/from work: NPS = **-30.0**
  - For who walk for purposes other than walking to work: NPS = **-4.0**
- The NPS score for respondents who walk as part of linked trips to/from work is significantly lower than others. This aligns to lower satisfaction scores for this group with average mean score of 7.5 out of 10 which is suggestive of the mandatory nature of the trip
- A higher number of promoters or loyal customers (43%) with a lower number of detractors or unhappy customer (28%) results in positive 15.6 NPS score for respondents who walk to work
- There is an opportunity to target the near market (i.e. those who walk for a linked trip to/from work and other purposes) by leveraging the commuter segment (i.e. walk the whole way to work) to promote walking initiatives through advocacy of the mode
- Further analysis of NPS scores shows that females are more likely to recommend walking to others with a NPS score of **+1.1** than males who have a lower NPS score of **-12.1**



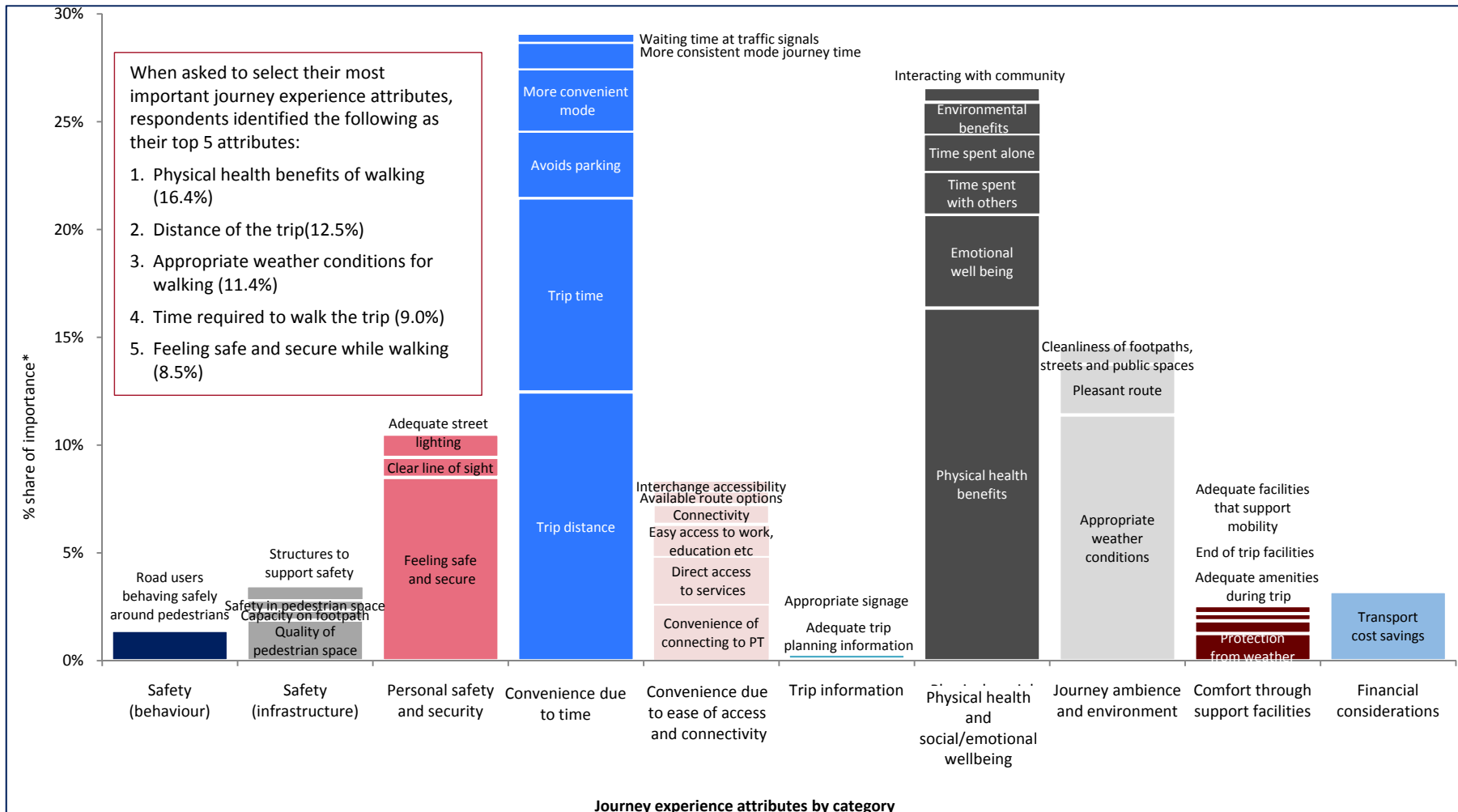
## 5. Importance

*Analysis of importance provides insight into what customers value the most about their walking journey experience as evidenced by share of importance based attributes selected as most important in deciding whether to walk (rather than use some other mode of transport)*



**INSIGHT:** The top five most important attributes when deciding whether to walk make up almost 50% of the total share of importance and relate to physical health, distance, weather, time and security

Importance of journey experience attributes in deciding whether to walk (rather than use some other mode of transport) as stated by survey respondents (QC4)



Note: n=1,203

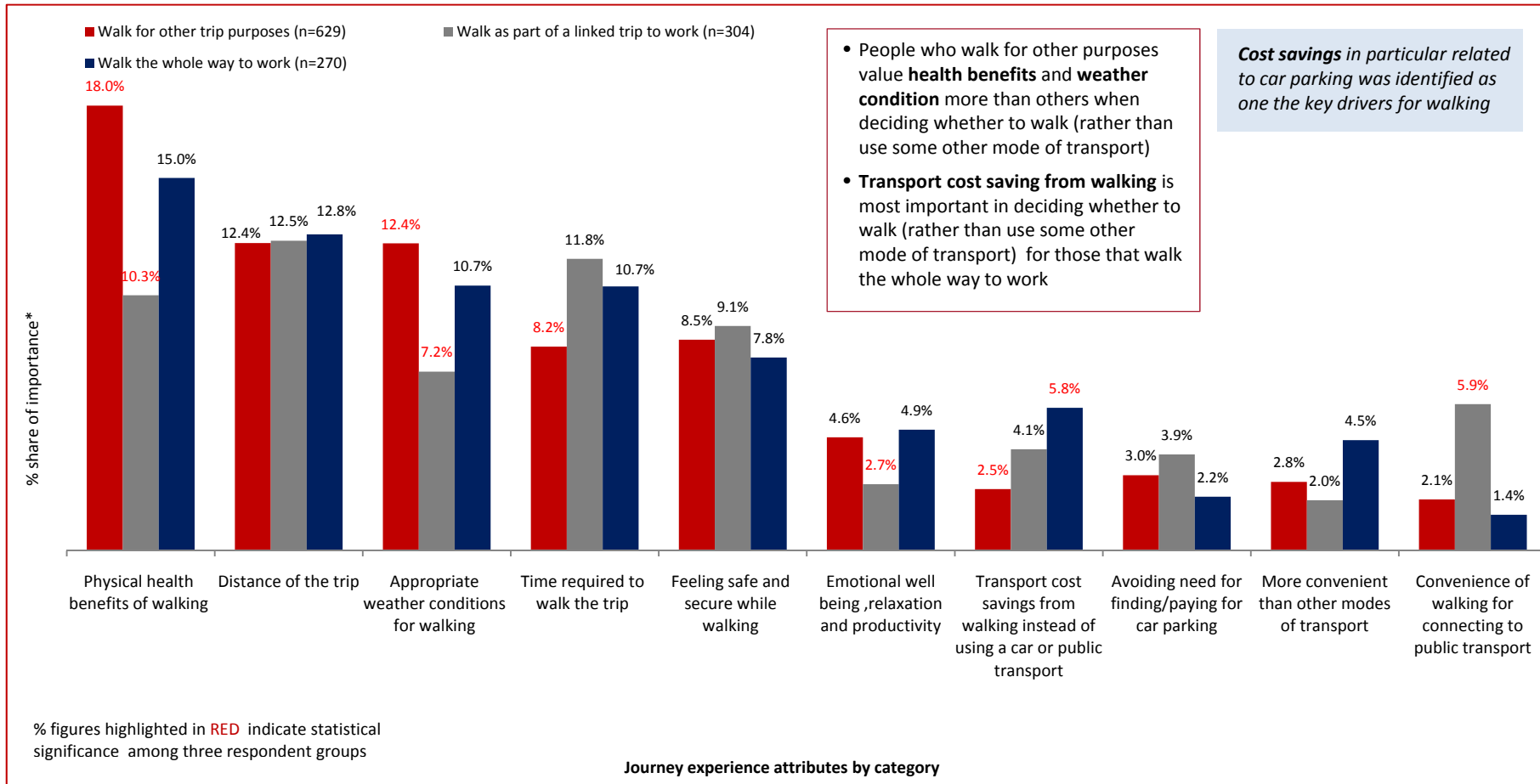
\* % share of importance represents weighted percentage of total share of importance based on top 3 attributes selected as most important in deciding whether to walk (rather than use some other mode of transport)

Source: Transport for NSW, Walking CVP Research, June 2013



## INSIGHT: Customers value different aspects of their walking journey experience depending on trip purpose

### Top ten most important attributes important when deciding whether to walk (rather than use some other mode of transport)



Note: n=1,203

\* % share of importance represents weighted percentage of total share of importance based on top 3 attributes selected as most important in deciding whether to walk (rather than use some other mode of transport)

## INSIGHT: The top eight most important walking journey experience attributes are consistent across trip purposes

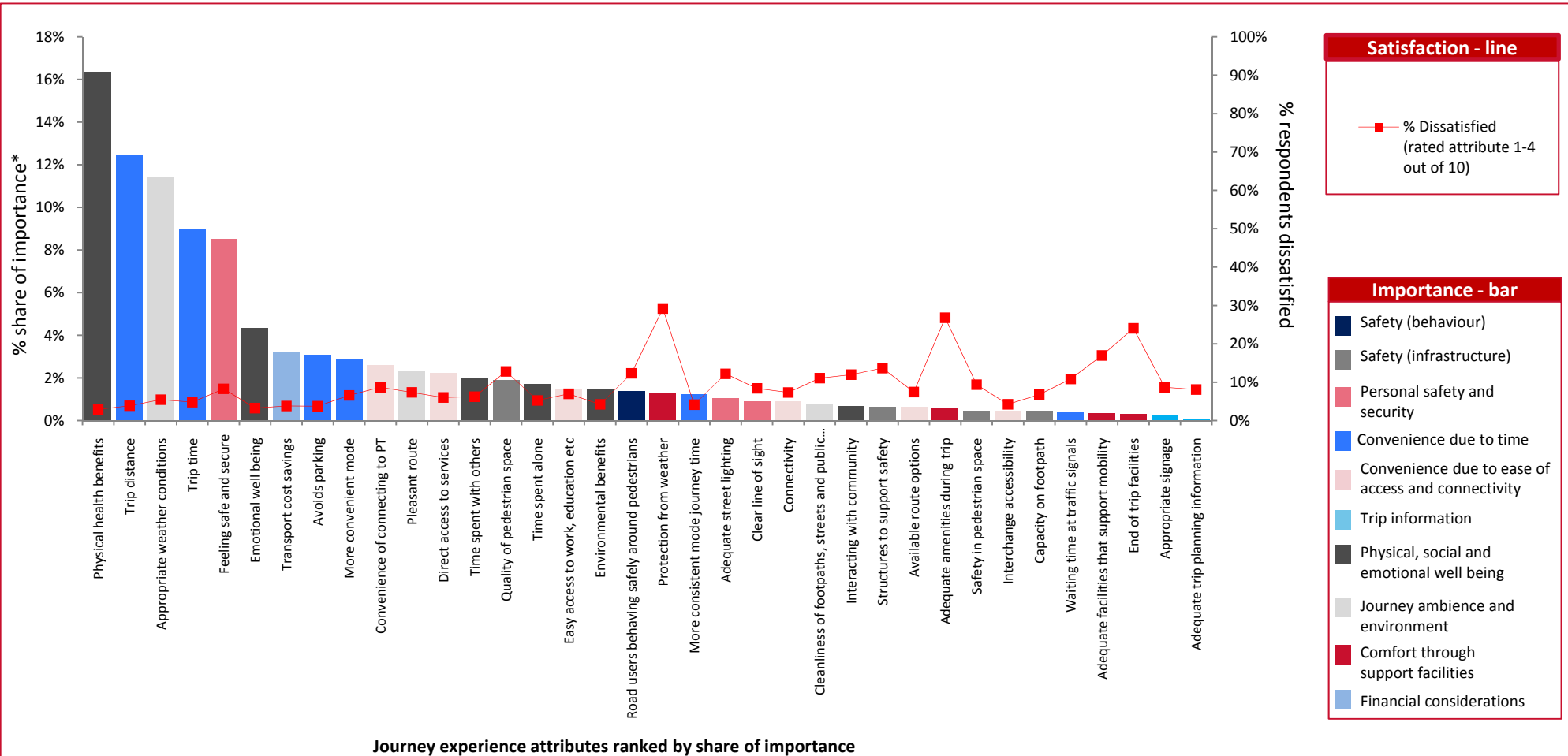
n=629 Walk for purposes other than walking to work		n=304 Walk as part of a link trip to/from work		n=270 Walk the whole way to/from work	
Top eight most important walking journey experience attributes by trip purposes <sup>1</sup>					
1. Physical health benefits of walking	18 %	1. Distance of the trip	12.5%	1. Physical health benefits of walking	15.0%
2. Distance of the trip	12.4%	2. Time required to walk the trip	11.8%	2. Distance of the trip	12.8%
3. Appropriate weather conditions for walking	12.4%	3. Physical health benefits of walking	10.3%	3. Appropriate weather conditions for walking	10.7%
4. Feeling safe and secure while walking	8.5%	4. Feeling safe and secure while walking	9.1%	4. Time required to walk the trip	10.7%
5. Time required to walk the trip	8.2%	5. Appropriate weather conditions for walking	7.2%	5. Feeling safe and secure while walking	7.8%
6. Emotional wellbeing, relaxation and productivity	4.6%	6. Convenience of walking for connecting to public transport	5.9%	6. Transport cost savings from walking instead of using a car or public transport	5.8%
7. Avoiding need for finding/paying for car parking	3.0%	7. Transport cost savings from walking instead of using a car or public transport	4.1%	7. Emotional wellbeing, relaxation and productivity	4.9%
8. More convenient than other modes of transport	2.8%	8. Avoiding need for finding/paying for car parking	3.9%	8. More convenient than other modes of transport	4.5%
<b>Themes identified</b>	<ul style="list-style-type: none"> <li>Physical health benefits of walking is of highest importance in deciding whether to walk (rather than use some other mode of transport) to those who walk for other trip purposes and is also the attribute of highest satisfaction</li> <li>Both trip distance and trip time fall within the top 5 most important attributes for majority of respondents which is consistent with findings from the qualitative research. This shows that trip time and distance are key determinants of selecting walking as a mode of transport</li> <li>Perception of personal safety and security while walking is valued in a similar manner across all three groups of respondents who walk</li> <li>Regional and Sydney SD respondents value the importance of walking journey attributes in a similar manner. The top five most important attributes in deciding whether to walk are the same for regional NSW and Sydney SD respondents however the order of importance varies</li> </ul>				

<sup>1</sup>Note: The top eight attributes of highest importance have been colour coded to show variation across trip purposes  
% share of importance represents weighted percentage of total share of importance based on top 3 attributes selected as most important in deciding to walk (rather than use some other mode of transport)  
Source: Transport for NSW, Walking CVP Research, June 2013



**INSIGHT:** Customers are generally more dissatisfied with attributes relating to availability and adequacy of support facilities however this is not of great importance in deciding whether to walk (rather than use some other mode of transport)

Dissatisfaction with attributes ranked by share of importance in deciding whether to walk (rather than use some other mode of transport)



Importance

Note: Analysis includes all respondents (n=1,203)

\*% share of importance represents weighted percentage of total share of importance based on top 3 most important attributes selected in deciding whether to walk (rather than use some other mode of transport)

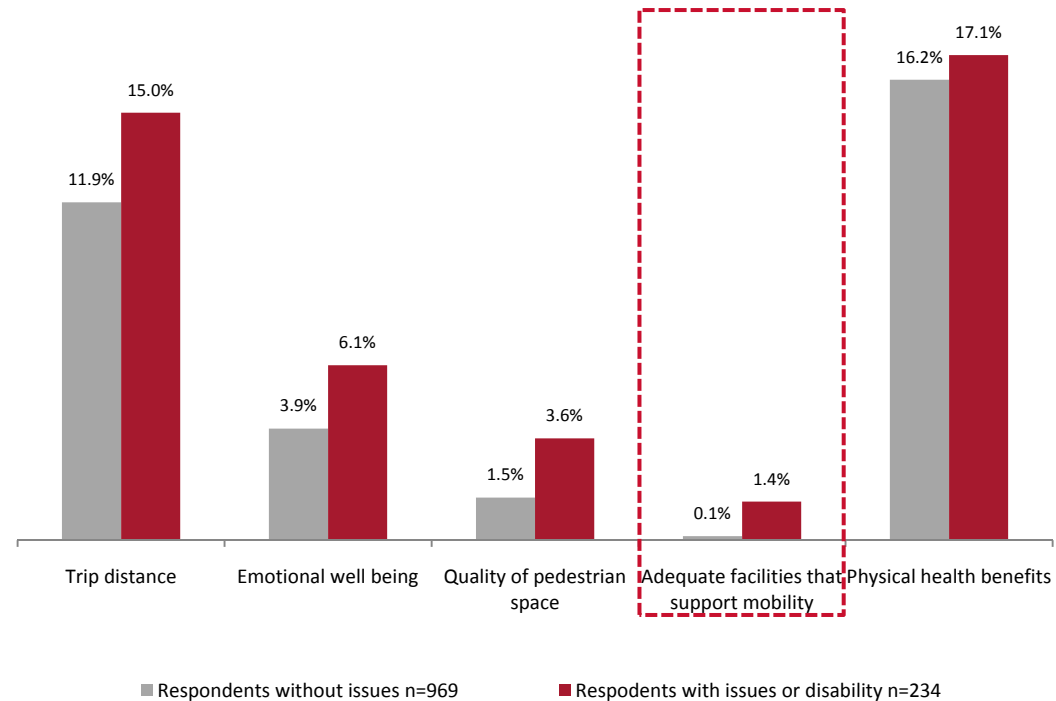
Source: Transport for NSW, Walking CVP Research, June 2013



**INSIGHT:** Customers who have a fitness/mobility issue and/or a registered disability place higher importance on trip distance, quality of pedestrian space and adequate facilities that support mobility in deciding whether to walk (rather than use some other mode of transport)

Variation in importance and satisfaction with facilities supporting mobility and different abilities (e.g. benches, dropped/low kerbs)

Top five walking journey experience attributes with greatest difference in share of importance between respondents with fitness/ mobility issues or a disability compared to those who do not (in order of greatest difference)



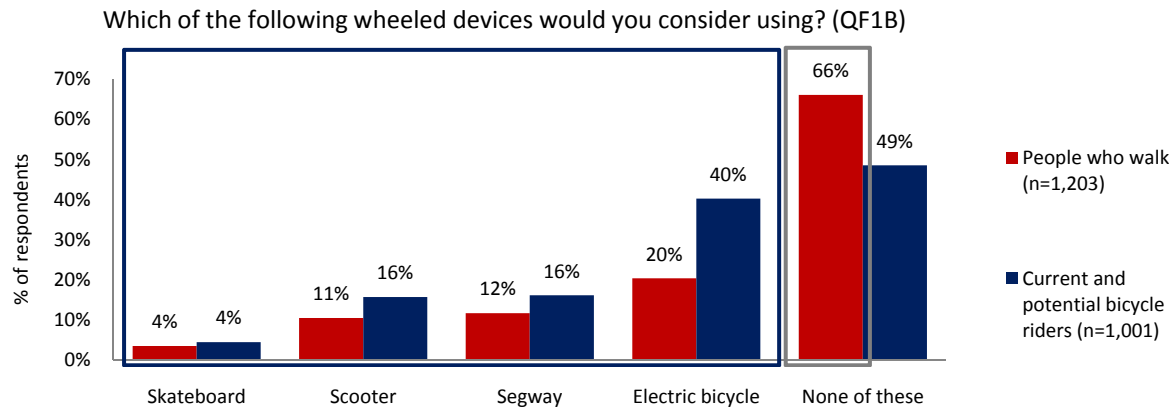
- Average satisfaction scores for respondents who have fitness, mobility issues or a registered disability (6.4) are slightly lower than that for respondents who do not (6.6). Satisfaction scores for both respondent groups are below overall average (7.3)
- Supporting facilities are more important to respondents who have fitness, mobility issues or a registered disability (1.4%) than those who do not (0.1%)
- There is no significant difference in satisfaction and importance of walking journey experience attributes relating to facilities, trip distance and physical health and emotional well being for respondents with fitness/mobility issues or a disability issues compared to those who do not for deciding whether to walk (rather than use some other mode of transport)





**INSIGHT:** Customers who would consider using a wheeled device are more likely to be male, risk takers, identify direct routes as important for persuading them to walk more often/further and less supportive of increased road rule enforcement

Variation in importance of attributes in deciding whether to walk (rather than use some other mode of transport), importance of initiatives for persuading customers to walk more often/further and attitudes by consideration of various wheeled devices



- A significantly higher proportion of respondents who would consider using a **skateboard and/or scooter** are **male** (60%) and significantly higher proportion of those who would consider using an **electric bicycle** are **male** (64%)
- Compared to those who would consider other devices, a higher proportion who would consider riding a **skateboard/scooter** agree that it is fine to take a few risks on roads and paths if it speeds up your journey (23%) and that pedestrians are an annoyance to drivers (34%)
- Having more direct routes and shortcuts available is more important for persuading those who **would consider a wheeled device** to walk than those who would not
- Increased enforcement of road rules to combat dangerous driving is significantly less important for persuading respondents who would consider a **skateboard, scooter or segway** to walk more often/further

- A significantly higher proportion of respondents who would not consider using any of the wheeled devices are:
  - **Female** (56%)
  - Hate sharing paths with scooters and skaters (54%) and hate sharing paths with bicycle riders (58%)
  - Are **not supportive** of the introduction of congestion charges and have attitudes in line with the speed averse respondents attitudinal group (41%)
- Overall the majority of respondents would not consider using any of the wheeled devices described (66%) and fewer would consider riding a skateboard (4%) compared to a scooter (11%), segway (12%) or electrical bicycle (20%)

n=1,001

## 6. Moments of Truth

*The combination of satisfaction with attributes across the walking journey experience and importance of attributes in deciding whether to walk (rather than use some other mode of transport) provides insight into how TfNSW can improve the walking journey experience in NSW*



# What is a Moment of Truth (MOT)?

Identify attributes which have the **greatest impact on overall satisfaction** with the walking journey experience

An attribute with satisfaction that is highly correlated with overall satisfaction has greater impact on the walking journey experience

Identify walking journey attributes which are of **highest importance** to people who walk

Attributes which have high importance to customers in deciding whether to walk (rather than use some other mode of transport) may have greater impact on the walking journey experience

A **Moment of Truth ('MOT')**, in this context, is a walking journey attribute that has significant impact on the walking experience. It is of high importance to customers and is a stronger determinant of their overall satisfaction












*To calculate a Moment of Truth....*


Understand the relationship between importance of attributes in deciding whether to walk (rather than use some other mode of transport) and impact on overall satisfaction

Plot the correlation with overall satisfaction of each attribute against its corresponding share of importance in deciding whether to walk (rather than use some other mode of transport)

Identify attributes which score high in both importance and impact on overall satisfaction. These are the Moments of Truth (MOT)

**INSIGHT:** Moments of Truth fall into the attribute categories of convenience due to time and connectivity, physical, social and emotional well being, journey ambience and environment and financial considerations

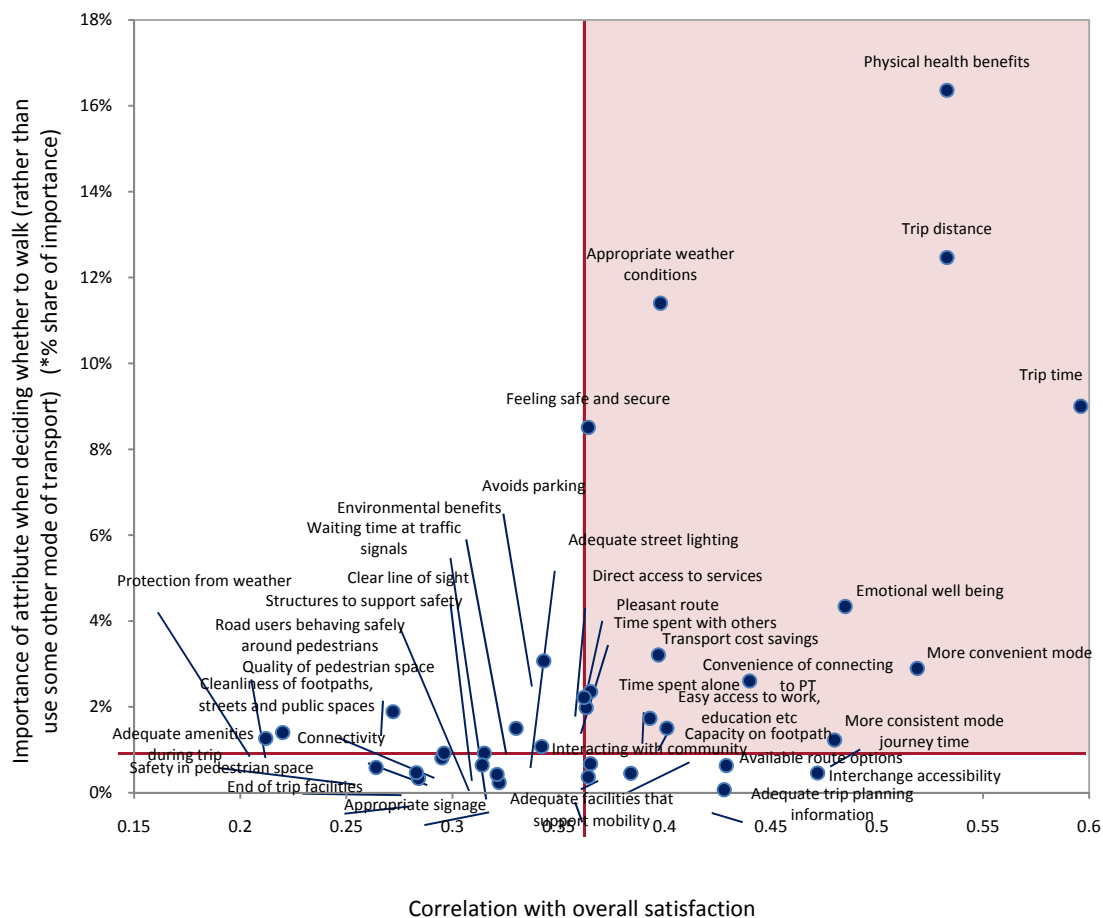
Attribute categories as defined by respondents									
Safety (behavior)	Safety (infrastructure)	Personal safety and security	Convenience due to time	Convenience due to ease of access and connectivity	Trip Information	Physical, social and emotional wellbeing	Journey ambience and environment	Comfort through support facilities	Financial considerations
Road users behaving safely around pedestrians	Quality of pedestrian space	Feeling safe and secure	Trip distance 	Convenience of connecting to PT 	Appropriate signage	Physical health benefits 	Appropriate weather conditions 	Protection from weather	Transport cost savings 
	Structures to support safety	Adequate street lighting	Trip time 	Easy access to work, education etc 	Adequate trip planning information	Emotional wellbeing 	Pleasant route 	Adequate amenities during trip	
	Safety in pedestrian space	Clear line of sight	More convenient mode 	Direct access to services		Time spent alone 	Cleanliness of footpaths, streets and public spaces	Adequate facilities that support mobility	
	Capacity of footpath		Avoiding parking	Connectivity		Time spent with others		End of trip facilities	
			More consistent mode journey time	Available route options		Environmental benefits			
			Waiting time at traffic signals	Interchange accessibility		Interacting with community			

**Legend:**  Moment of Truth (high importance and correlation to satisfaction)



## INSIGHT: Moments of Truth can be used to prioritise attributes of high importance when deciding whether to walk and of greatest impact on customers' overall satisfaction

### Moments of Truth (MOTs) for people who walk across all purposes



- MOTs for all respondents span the service areas of:
  - Financial considerations
  - Journey ambience and environment
  - Physical, social and emotional wellbeing
  - Convenience due to time
  - Convenience due to ease of access and connectivity
- Based on this analysis, the following attributes are identified as MOTs in order of importance when deciding whether to walk (rather than use some other mode of transport) :
  - Physical health benefits of walking
  - Distance of the trip
  - Appropriate weather conditions for walking
  - Time required to walk the trip
  - Emotional well being, relaxation and productivity
  - Transport cost savings from walking instead of using a car or public transport
  - More convenient than other modes of transport
  - Convenience of walking for connecting to public transport
  - Availability of a relaxing, scenic, pleasant route
  - Time spent alone
  - Ease of access to work, education, or school

Note: n = 1,203  
 \* % share of importance represents weighted percentage of total share of importance based on top 3 attributes selected as most important in deciding whether to walk (rather than use some other mode of transport)  
 Source: Transport for NSW, Walking CVP Research, June 2013

Note: Median importance of 1.33% and median correlation to satisfaction of 0.364 used as determinants  
 Outlines the Moments of Truth



## INSIGHT: Attributes which are Moments of Truth also appear to be attributes of higher satisfaction for walking

**Moments of Truth**

Provide insights into stated and revealed importance of attributes when deciding whether to walk

Walking journey experience attributes	Avg. Satisfaction	% Satisfied	% Dissatisfied	importance	Correlation to satisfaction	Moment of Truth *	Priority
Physical health benefits	8.50	87%	3%	16.4%	0.533	Moment of Truth	●
Trip distance	8.11	82%	4%	12.5%	0.533	Moment of Truth	●
Appropriate weather conditions	7.36	71%	5%	11.4%	0.398	Moment of Truth	●
Trip time	8.06	83%	5%	9.0%	0.596	Moment of Truth	●
Emotional well being	8.11	82%	3%	4.3%	0.485	Moment of Truth	●
Transport cost savings	7.82	75%	4%	3.2%	0.397	Moment of Truth	●
More convenient mode	7.47	69%	7%	2.9%	0.519	Moment of Truth	●
Convenience of connecting to PT	7.41	70%	9%	2.6%	0.440	Moment of Truth	●
Pleasant route	7.34	70%	7%	2.4%	0.365	Moment of Truth	●
Time spent alone	7.77	78%	5%	1.7%	0.393	Moment of Truth	●
Easy access to work, education etc	7.39	69%	7%	1.5%	0.401	Moment of Truth	●
Feeling safe and secure	7.58	73%	8%	8.5%	0.364	More important	●
Avoids parking	8.01	79%	4%	3.1%	0.343	More important	●
Direct access to services	7.83	80%	6%	2.2%	0.362	More important	●
Time spent with others	7.33	69%	6%	2.0%	0.363	More important	●
Quality of pedestrian space	6.95	63%	13%	1.9%	0.272	More important	●
Environmental benefits	7.53	70%	4%	1.5%	0.330	More important	●
Road users behaving safely around pedestrians	6.87	61%	12%	1.4%	0.220	More important	●
More consistent mode journey time	7.78	76%	4%	1.2%	0.480	More important	●
Interacting with community	6.82	58%	12%	0.7%	0.365	More important	●
Available route options	7.17	67%	7%	0.6%	0.429	More important	●
Interchange accessibility	7.33	66%	4%	0.5%	0.472	More important	●
Capacity on footpath	7.55	74%	7%	0.5%	0.384	More important	●
Adequate trip planning information	7.10	64%	8%	0.1%	0.428	More important	●
Protection from weather	5.73	37%	29%	1.3%	0.212	Less important	●
Adequate street lighting	6.97	65%	12%	1.1%	0.342	Less important	●
Clear line of sight	7.36	72%	8%	0.9%	0.315	Less important	●
Connectivity	7.47	74%	7%	0.9%	0.296	Less important	●
Cleanliness of footpaths, streets and public spaces	7.11	66%	11%	0.8%	0.295	Less important	●
Structures to support safety	6.90	60%	14%	0.6%	0.314	Less important	●
Adequate amenities during trip	5.89	43%	27%	0.6%	0.264	Less important	●
Safety in pedestrian space	7.12	67%	9%	0.5%	0.283	Less important	●
Waiting time at traffic signals	7.09	67%	11%	0.4%	0.321	Less important	●
Adequate facilities that support mobility	6.59	56%	17%	0.4%	0.364	Less important	●
End of trip facilities	6.18	49%	24%	0.3%	0.284	Less important	●
Appropriate signage	7.16	65%	9%	0.2%	0.322	Less important	●

Note: % satisfied includes responses 7-10 and % dissatisfied includes responses 1-4 on a 10 point scale

Green text denotes top 10 satisfied  
Red text denotes top 10 dissatisfied

\*MOT calculated based on correlation to satisfaction and importance scores. The median scores on each axis have been used as the determinants for the analysis: Median importance of 1.33% Median correlation to satisfaction of 0.364 used as determinants

Note: n = 1,203

- Moments of Truth
- Important (above median for either importance or correlation with overall satisfaction)

Source: Transport for NSW, Walking CVP Research, June 2013



Transport  
for NSW

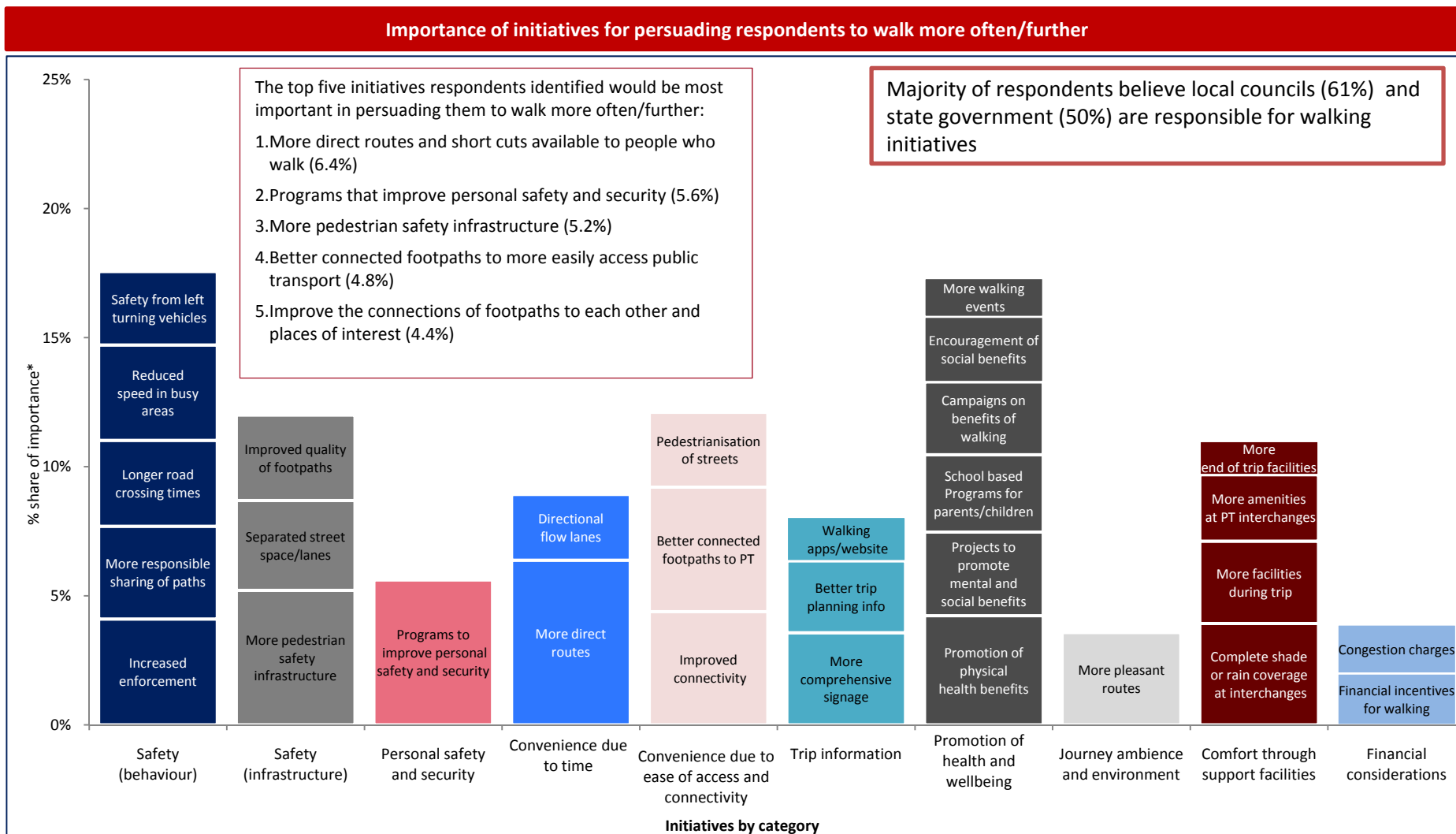
## 7. Initiatives

*Provides insight into initiatives that could improve the walking journey experience in NSW for customers. We ask respondents to trade off initiatives to identify those that are most / least important in persuading them to walk more and/or further*





**INSIGHT:** A variety of initiatives appear likely to persuade more customers to walk more, these include infrastructure and non infrastructure initiatives



Note: n = 1,203

Note\*: % share of importance represents weighted percentage of total share of importance based on trade-offs of initiatives that are most/least important for persuading respondents to walk more often/further

Source: Transport for NSW, Walking CVP Research, June 2013



## INSIGHT: Most important initiatives for persuading customers to walk more are mostly similar across trip purposes

n=629

Walk for purposes other than walking to work

n=304

Walk as part of a linked trip to/from work

n=270

Walk the whole way to/from work

Demographic analysis	
Analysis across all respondents	
<b>Infrastructure initiatives:</b>	
<ul style="list-style-type: none"> <li>• More direct routes and short cuts is of higher importance for persuading those under 30 (7.1%) and those living in the Sydney SD (7.05%) to walk more often/further</li> <li>• Better connected footpaths to more easily access public transport is more important for persuading those who live in the Central Coast (6.7%) to walk</li> </ul>	
<b>Non infrastructure initiatives:</b>	
<ul style="list-style-type: none"> <li>• Increased enforcement (5.2%), education programs in schools (4.1%) and longer time given for pedestrians to cross at traffic signals is more important for persuading those aged 60 and over (4.5%) to walk more</li> <li>• Projects to persuade physical health benefits (5.7%) and social aspects (3.4%) of walking are of higher importance to those living in the Mid North Coast, New England and Northern Rivers regions</li> </ul>	

### Top five initiatives of highest importance<sup>1</sup> in persuading respondents to walk more often/further

Walk for purposes other than walking to work		Walk as part of a linked trip to/from work		Walk the whole way to/from work	
1. More direct routes and short cuts available to people who walk	6.0%	1. More direct routes and short cuts available to people who walk	7.1%	1. More direct routes and short cuts available to people who walk	7.8%
2. Programs that improve personal safety and security	5.7%	2. Better connected footpaths to more easily access public transport	6.0%	2. Programs that improve personal safety and security	5.9%
3. More pedestrian safety infrastructure	5.2%	3. Complete shade or rain coverage on key routes and around public transport interchanges	5.9%	3. More pedestrian safety infrastructure	5.2%
4. Better connected footpaths to more easily access public transport	4.7%	4. More pedestrian safety infrastructure	5.2%	4. Better connected footpaths to more easily access public transport	4.4%
5. Projects that promote the physical health benefits of walking and get more people walking	4.6%	5. Programs that improve personal safety and security	5.0%	5. Improve the connections of footpaths to each other and places of interest	4.3%

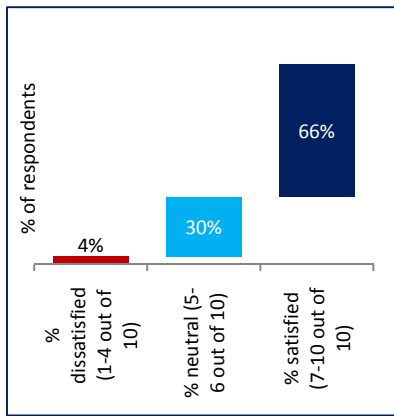
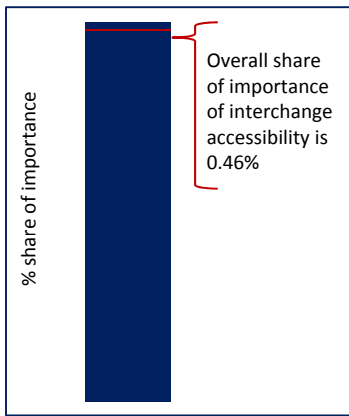
<sup>1</sup>Note: The top five initiatives of highest importance have been colour coded to show variation across trip purposes

Note: % share of importance represents weighted percentage of total share of importance based on trade-offs of initiatives that are most/least important for persuading respondents to walk more often/further  
Source: Transport for NSW, Walking CVP Research, June 2013



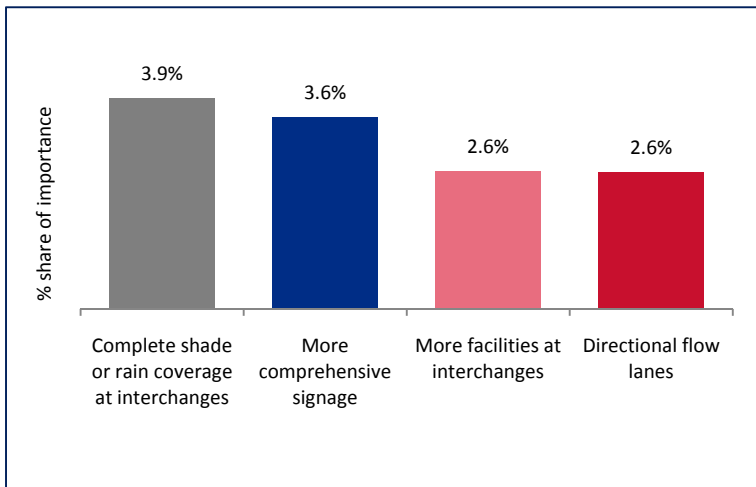
## INSIGHT: Complete shade and rain coverage at interchanges is important for persuading customers to walk more

### Satisfaction and importance with interchange accessibility as part of the walking journey experience



- Compared to other journey attributes, **importance** of ease and accessibility of walking to, between and around interchanges is **lower** (0.46%) when deciding whether to walk (rather than use some other mode of transport) while **satisfaction** is **higher** with 66% of respondents identifying they are satisfied (rate 7-10 out of 10) with the ease and accessibility of walking to, between and around interchanges
- While there are no significant differences in the importance of interchange accessibility for respondents when deciding whether to walk (rather than use some other mode of transport) by demographics, this attribute is slightly more important to:
  - Those who most frequently **walk as part of a linked trip to work** (0.6%) compared to those who most frequently walk the whole way to work (0.5%) or for other purposes (0.4%)
  - Those who live in **Sydney SD** (0.5%) compared to those who live in other regions (0.3%)
  - Those who connect to a **bus** (0.7%) or a **train** (0.6%) compared to other modes of transport (0.2%)
- While there are no significant differences in satisfaction with interchange accessibility as part of the walking experience by demographics, **dissatisfaction** is slightly higher amongst those who connect to a **bus** (9% dissatisfied) compared to the train (5% dissatisfied)

### Initiatives at interchanges that would persuade customers to walk more often/further



- For all respondents, having **complete shade or rain coverage at interchanges** is slightly more important for persuading them to walk more/further than more comprehensive signage, more facilities or directional flow lanes at interchanges
- Complete shade or rain coverage at interchanges** is more important for persuading respondents to walk more often/further, for those who:
  - Walk most frequently as part of a **linked trip to work** (5.9% share of importance) compared to those who walk most frequently the whole way to work (4.1%) or for other purposes (3.6%)
  - Live in **Sydney SD** to walk more/further compared to those who live in other regions of NSW
  - Sometimes or usually **connect to a bus** as part of their journey (5.5% share of importance) compared to those who connect to a train (4.90%), car (3.79%) or other mode of transport (3.85%)
- More comprehensive signage** is significantly more important for persuading those aged **30-49** to walk more often/further (4.0%) compared to other age groups
- More facilities at interchanges** is significantly less important to those who sometimes or usually **connect to a bus** as part of their journey compared to those who connect to other modes of transport
- Directional flow lanes** is significantly more important for persuading those who live in **Sydney SD** (2.8% share of importance) to walk more often/further compared to other regions

Note: n = 1,203

Note\*: % share of importance represents weighted percentage of total share of importance based on top 3 attributes selected as most important in deciding whether to walk (rather than use some other mode of transport). % share of importance of initiatives represents weighted percentage of total share of importance based on trade-offs of initiatives that are most/least important for persuading respondents to walk more often/further

Source: Transport for NSW, Walking CVP Research, June 2013

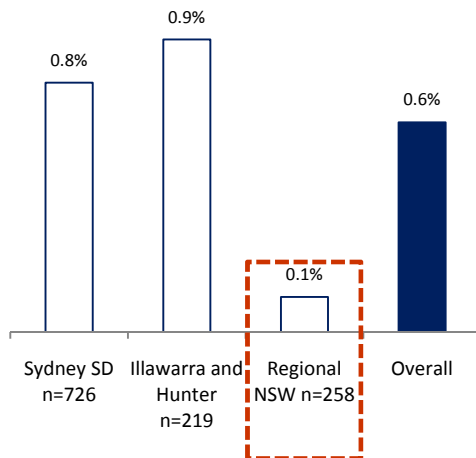


## INSIGHT: More pedestrian safety infrastructure may persuade customers to walk more often/further

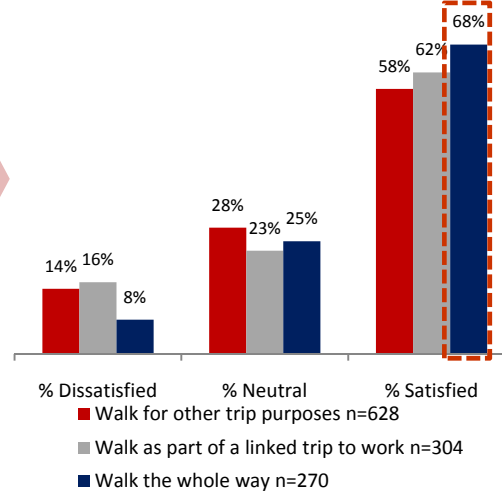
### Variation in importance and satisfaction with infrastructure that supports pedestrian safety (e.g. barriers, crossings)

- **Satisfaction** with 'adequate structures that support pedestrian safety' (average satisfaction of 6.9 out of 10) is slightly lower than the overall average (7.4)
- More of those who walk the whole way to work (68% satisfied) or walk as part of a linked trip to work (62% satisfied) are **satisfied** with current infrastructure for pedestrian safety compared to those who walk most frequently for other trip purposes (58% satisfied). When compared to all other journey experience attributes, pedestrian safety is of lower **importance** to those who walk for other trip purposes compared to most other aspects of their journey experience (0.4%)
- Overall **importance** of this attribute is low. Regional respondents place lowest importance on this journey attribute (0.1% share of importance), while respondents living in Sydney SD, Illawarra and Hunter identify infrastructure that supports pedestrian safety as being of higher importance (0.9%)
- Having more pedestrian safety infrastructure ranks as the 3<sup>rd</sup> most important initiative however there is no significant difference in importance across varying demographics and trip purposes

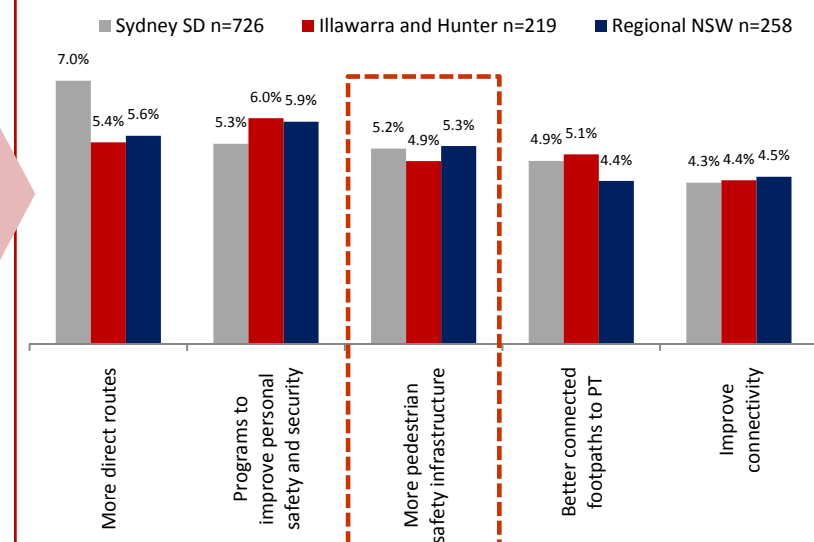
Infrastructure supporting pedestrian safety is of lower importance than other attributes, especially for regional respondents



Satisfaction with infrastructure supporting pedestrian safety is of higher satisfaction amongst those that walk the whole way to work most frequently



Having more pedestrian safety infrastructure is important for Persuading customers to walk more and/or further



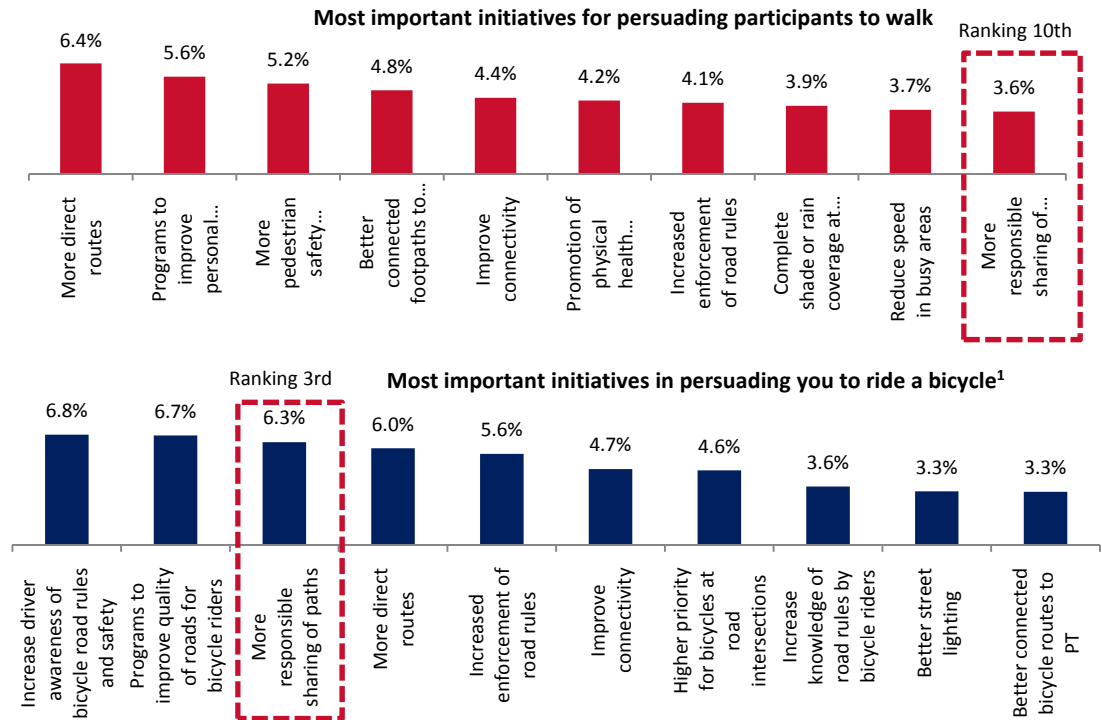
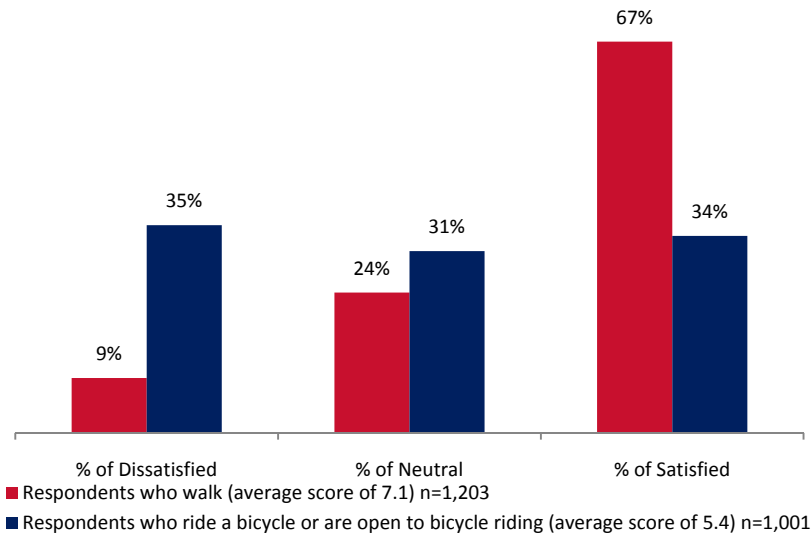


## INSIGHT: Safety on shared paths is less important for persuading customers to walk more/further than for persuading customers to ride a bicycle more/further

### Variation in importance and satisfaction with behaviour on shared paths between people who walk and current and potential bicycle riders

- Although the percentage of respondents satisfied with others' behaviour on shared paths while walking is high, the average satisfaction score of 7.1 is below the overall average (7.4) across walking journey attributes. Bicycle riders and potential bicycle riders however express high dissatisfaction with others behaviour on shared paths when compared with other bicycle riding journey attributes and respondents
- Respondents who ride a bicycle or are open to bicycle riding place slightly higher importance on safety on shared paths (0.9%) than those who walk (0.5%) however, the importance of shared paths is lower than other walking and bicycle riding journey attributes
- When asked to trade off initiatives that would persuade them to walk/ride a bicycle more often/further, the initiative 'enabling pedestrians and bicycle riders to share dedicated off road paths more responsibly' was more important to current and potential bicycle riders (6.3% share of importance) than to people who walk (3.6% share of importance)

Satisfaction with shared paths is lowest for potential and bicycle riders compared to people who walk<sup>1</sup>



<sup>1</sup> Note: Source is Transport for NSW, Cycling CVP Research, June 2013  
Source: Transport for NSW, Walking CVP Research, June 2013



**INSIGHT:** Customers who are supportive of prioritising walking have highest average overall satisfaction and identify campaigns to persuade people about the benefits of walking as more important for persuading them to walk more/further

<b>Speed averse</b> <i>(42% of respondents)</i> "I think speed limits should be reduced around schools and in busy city/town centers"	<b>Health, environment, safety and security aware</b> <i>(23% of respondents)</i> "I often feel anxious about my personal safety and security... I prefer to walk away from roads"	<b>Supportive of prioritising walking</b> <i>(35% of respondents)</i> "Pedestrians should have priority... I wouldn't mind less road space for cars if it meant more street space for walking"
<b>How satisfied are I overall? How likely is it that I would recommend walking instead of using another mode of transport?</b>		
<ul style="list-style-type: none"> <li>• <b>Average satisfaction</b> with walking overall: <b>7.9</b></li> <li>• <b>NPS:-8.2</b></li> <li>• <b>Higher dissatisfaction with</b> attributes relating to physical, social and emotional wellbeing compared to other attitudinal groups</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Average satisfaction</b> with walking overall: <b>7.6</b></li> <li>• <b>NPS:-14.1</b></li> <li>• <b>Higher dissatisfaction with</b> attributes relating to comfort through support facilities in particular adequate facilities that support mobility and different abilities</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Average satisfaction</b> with walking overall: <b>8.3</b></li> <li>• <b>NPS:-3.8</b></li> <li>• <b>More satisfied with</b> most walking attributes compared to other attitudinal groups in particular, those relating to infrastructure and support facilities</li> </ul>
<b>Which initiatives are most important for persuading me to walk more often/further?</b>		
<ul style="list-style-type: none"> <li>• More direct routes and short cuts available to people who walk</li> <li>• Programs that improve personal safety and security (e.g. better street lighting, no dark corners on routes, people around)</li> <li>• <b>More pedestrian safety infrastructure (e.g. barriers, refuge islands, crossings)</b></li> </ul>	<ul style="list-style-type: none"> <li>• More direct routes and short cuts available to people who walk</li> <li>• Programs that improve personal safety and security (e.g. better street lighting, no dark corners on routes, people around)</li> <li>• Better connected footpaths to more easily access public transport</li> </ul>	<ul style="list-style-type: none"> <li>• More direct routes and short cuts available to people who walk</li> <li>• <b>More pedestrian safety infrastructure (e.g. barriers, refuge islands, crossings)</b></li> <li>• Programs that improve personal safety and security (e.g. better street lighting, no dark corners on routes, people around)</li> </ul>
<b>Which initiatives are more important for persuading me to walk more often/further compared to other attitudinal groups?</b>		
<ul style="list-style-type: none"> <li>• Reduce speed zones where there are lots of people walking</li> <li>• Complete shade or rain coverage on key routes and around public transport interchanges</li> <li>• Stop vehicles turning left with red traffic light while pedestrians cross</li> </ul>	<ul style="list-style-type: none"> <li>• More direct routes and short cuts available to people who walk</li> <li>• Programs that improve personal safety and security (e.g. better street lighting, no dark corners on routes, people around)</li> <li>• Better connected footpaths to more easily access public transport</li> </ul>	<ul style="list-style-type: none"> <li>• Campaigns to persuade people about the benefits of walking to the transport system and them personally</li> <li>• Congestion charges for car drivers coming into busy cities / towns in peak hours</li> <li>• Financial incentives and discounts for people who walk to work</li> </ul>



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## 8. So what does this all mean?

*The relationship between attributes, importance, satisfaction, initiatives and choice trade offs...*



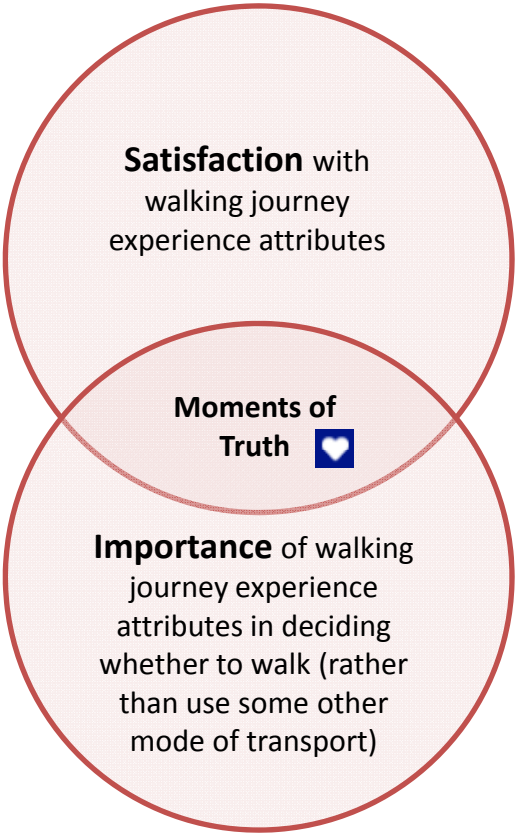
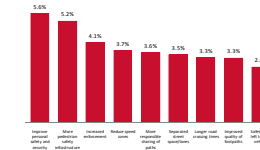
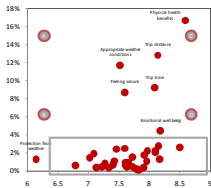
**CONCLUSION:** Understanding importance and satisfaction of the current walking experience and initiatives that would likely promote walking is vital

**Current walking journey experience**

*What do customers value about their current walking experience?*

**Initiatives that are perceived to increase walking**

*What is most important in persuading customers to walk more/further?*

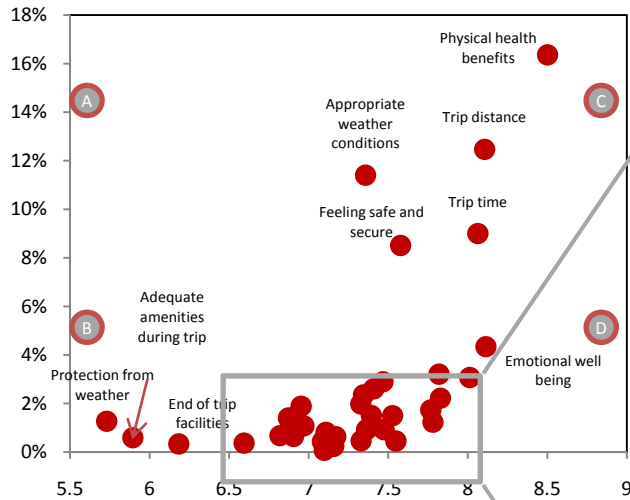


Understanding importance and satisfaction together provides greater insight into aspects of the walking journey experience to improve, build on and maintain, driving by the customer research

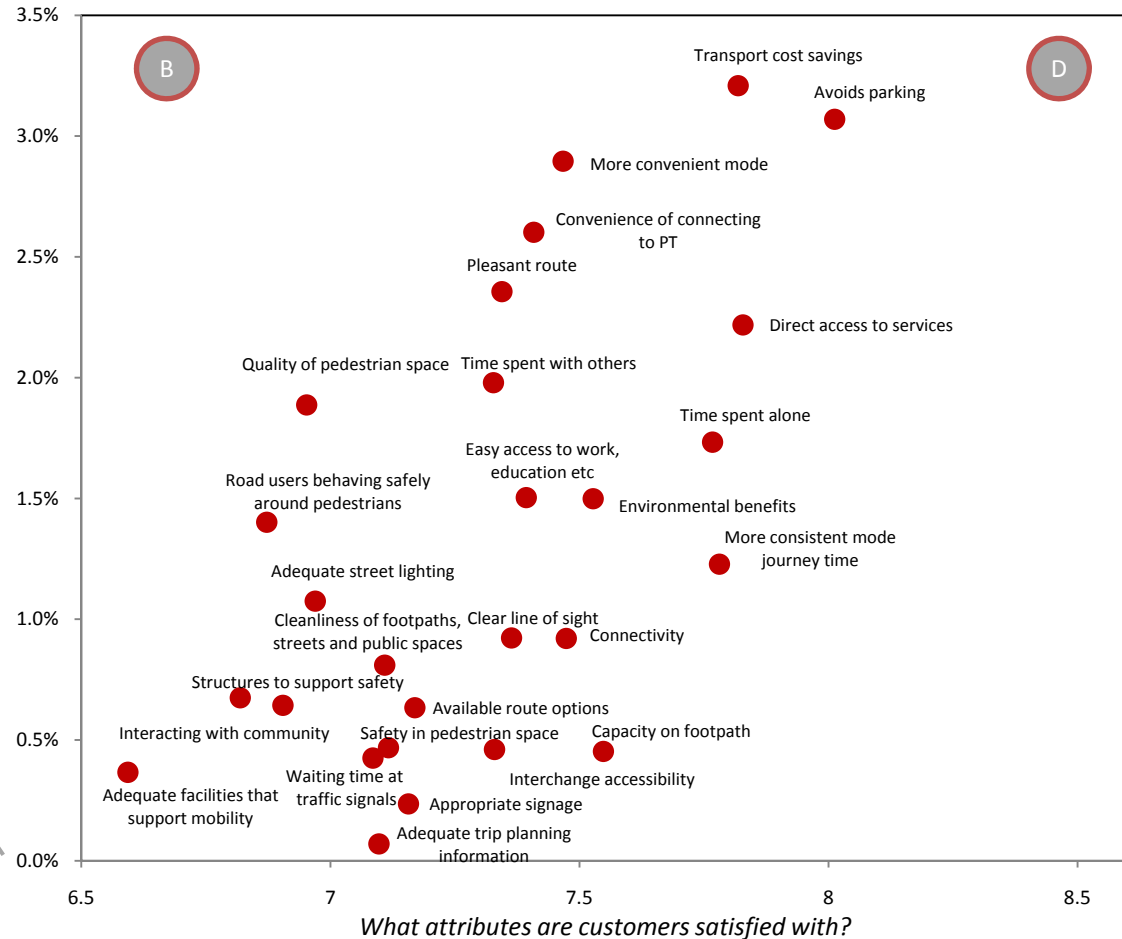
Understanding what is most / least important in persuading customers to walk more based on choices they make when asked to tradeoff initiatives helps to prioritise future investment

Source: Transport for NSW, Walking CVP Research, June 2013

## CONCLUSION: TfNSW should leverage the physical health benefits to promote walking as a mode of transport



What attributes are important to customers in deciding whether to walk or use some other mode of transport?



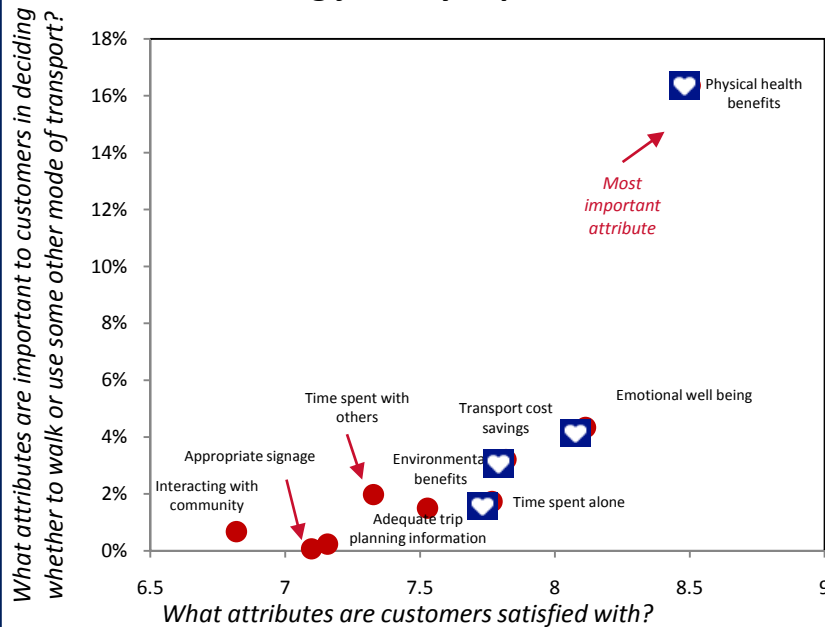
What attributes are customers satisfied with?

- A** **Improve: high priority** – focus on improving attributes of high importance in the customers decision to walk (rather than use some other mode of transport)
- B** **Improve: lower priority** – improve attributes of low satisfaction
- C** **Build on** – invest in attributes of high importance and high satisfaction
- D** **Maintain** – continue to maintain attributes that customers are satisfied with

So what does it all mean?

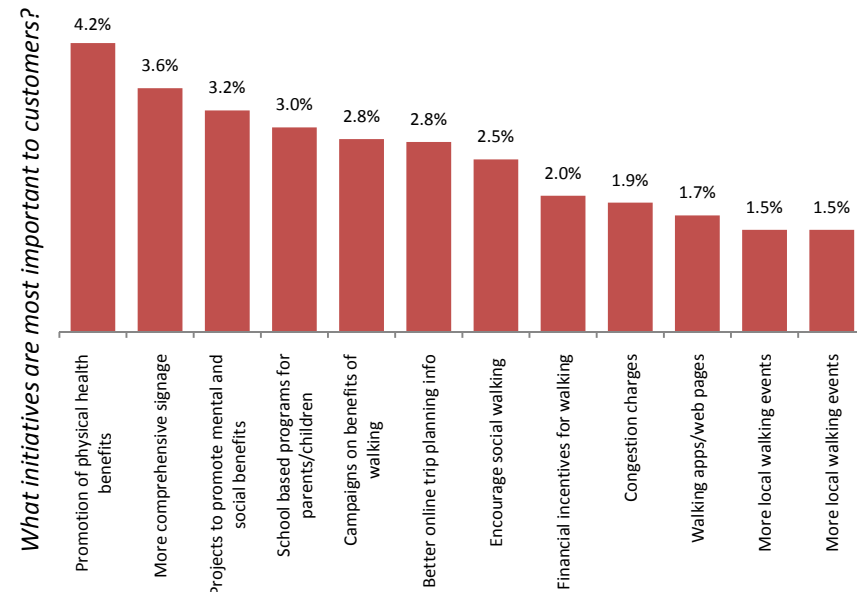
**CONCLUSION:** Non infrastructure interventions, such as information and promotion, are important for persuading customers to walk more

### What do customers value about their current walking journey experience?



- Satisfaction and importance for physical health benefits are both high however appropriate weather conditions is of high importance to respondents but currently low satisfaction. This is however, of limited control by TfNSW
- Attributes of cleanliness, pleasantness of route and interactions with community all have lower satisfaction compared to other ambience and well being related attributes.

### What is most important in persuading customers to walk more/further?



- Aligning to the attribute identified as most important within this category, promotion of physical health benefits is most important for persuading customers to walk more often/further
- Respondents place above average importance on the initiative of more comprehensive signage in and around city/town centres and interchanges showing walking time, distance and routes to key destinations for persuading them to walk more often/further

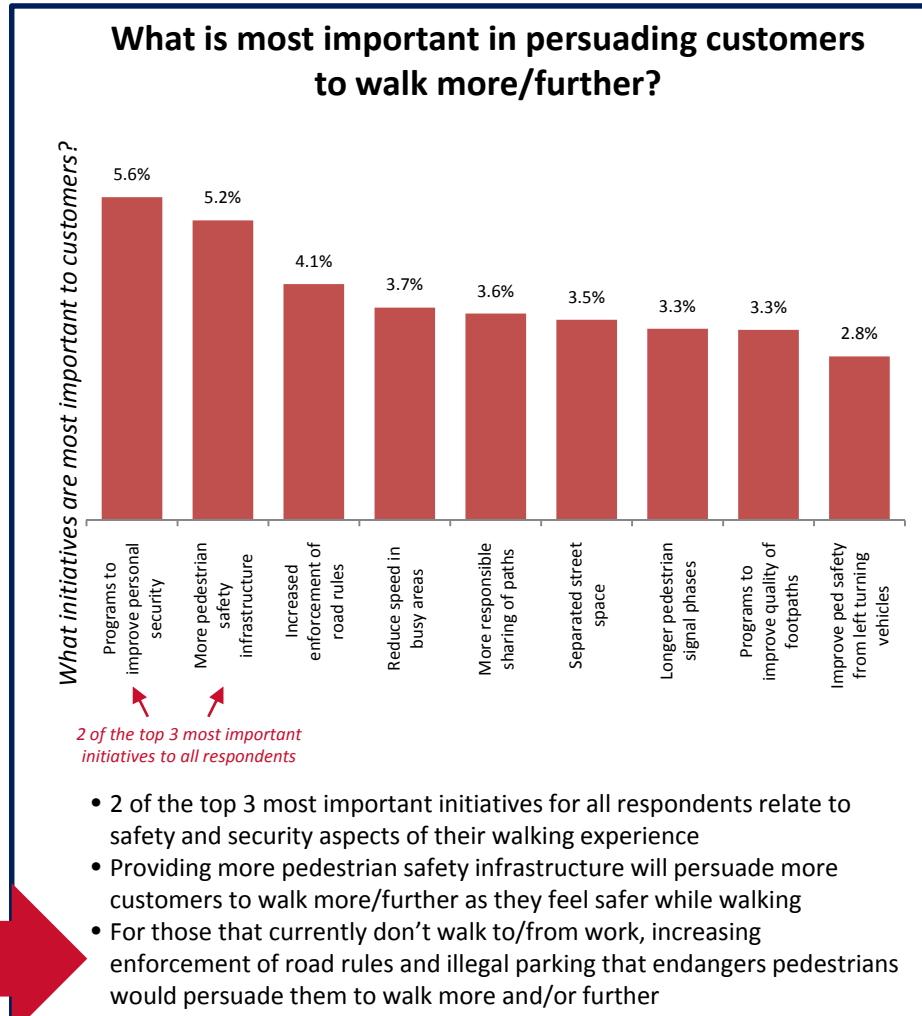
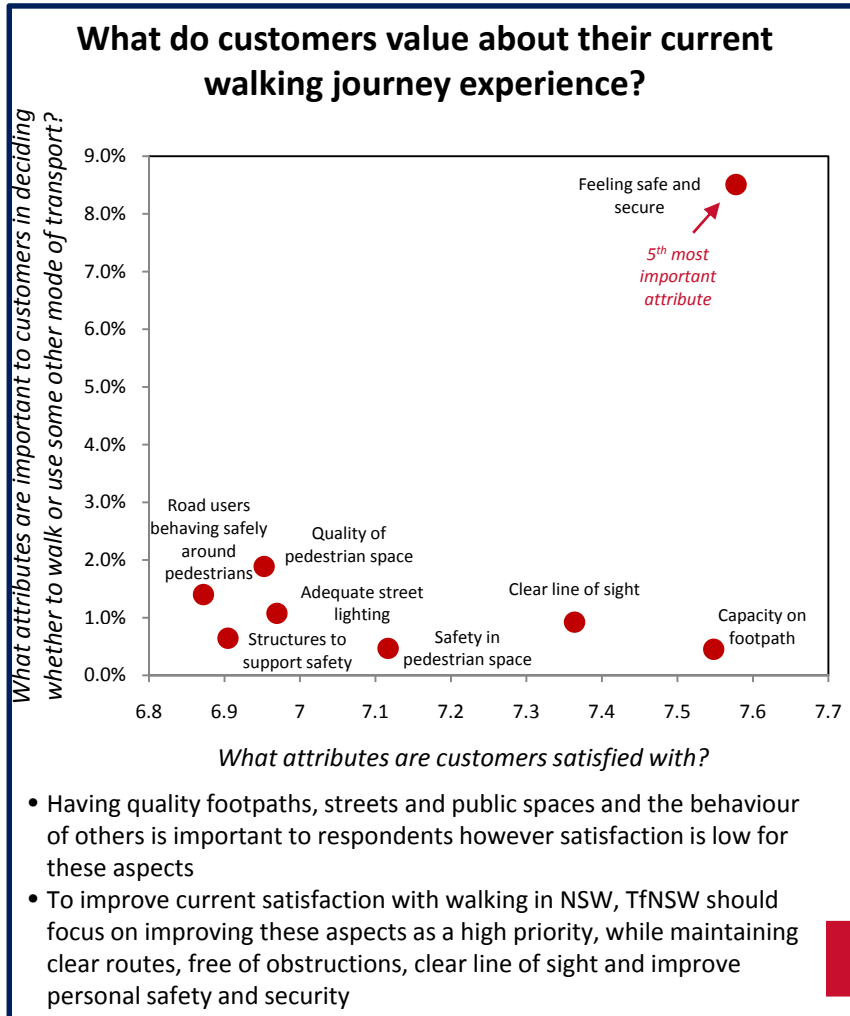
Note: Allocation of attributes to the ambience and well being category identified based on unprompted allocation by participants in the qualitative research

Moment of Truth

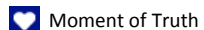
Source: Transport for NSW, Walking CVP Research, June 2013

So what does it all mean?

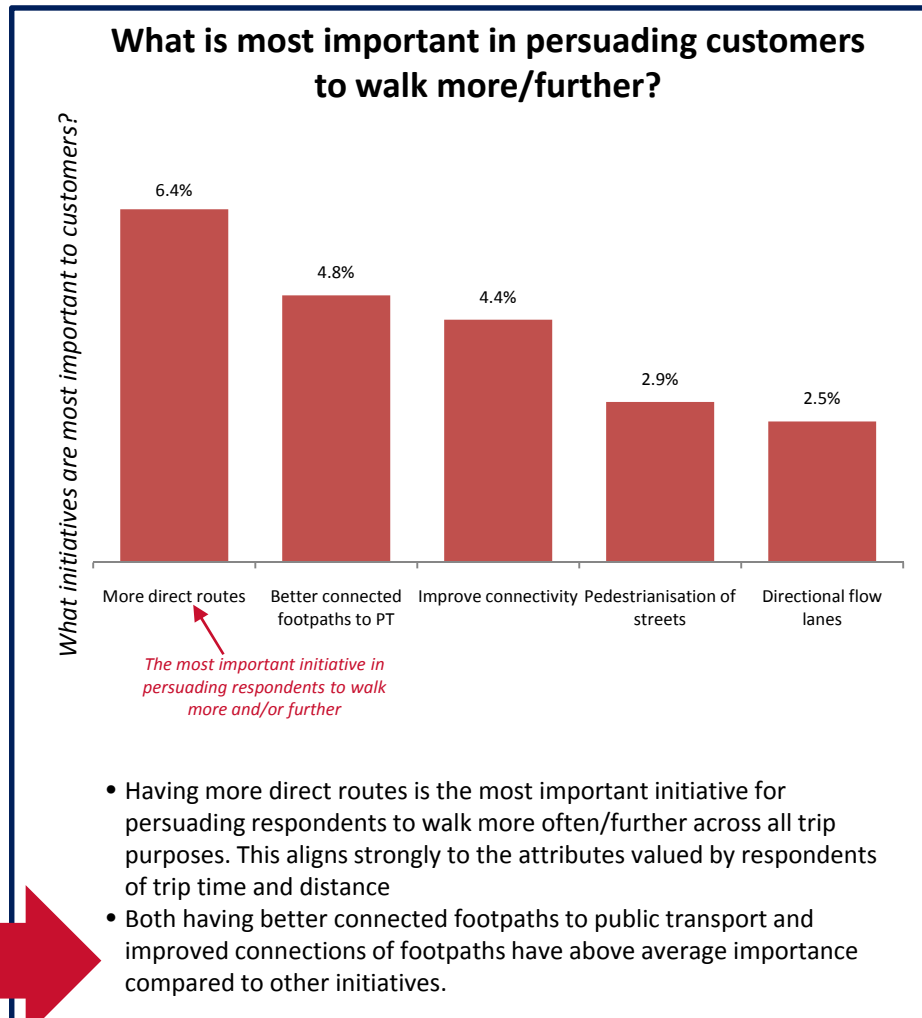
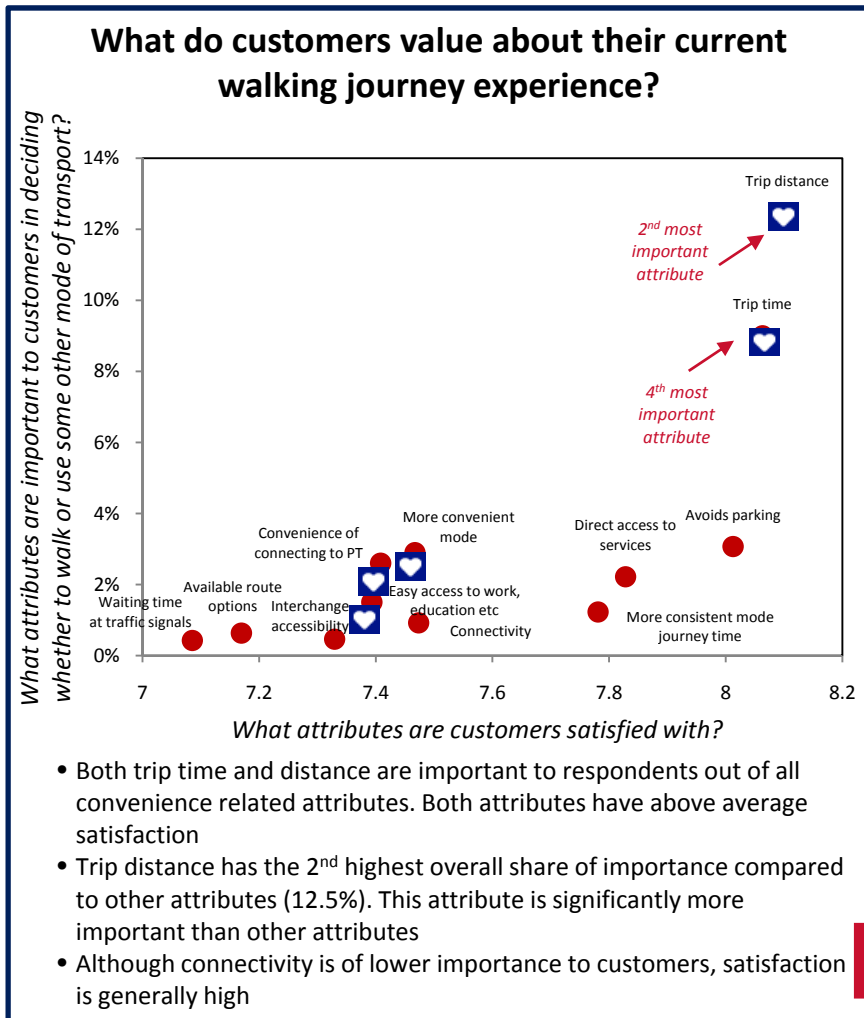
**CONCLUSION:** Pedestrian safety and personal security are important aspects of the walking journey experience and key to persuading customers to walk more



Note: Allocation of attributes to the safety category identified based on unprompted allocation by participants in the qualitative research



**CONCLUSION:** Trip time and distance are important to customers as part of their walking journey experience however more direct routes and better connected footpaths to PT would persuade customers to walk more



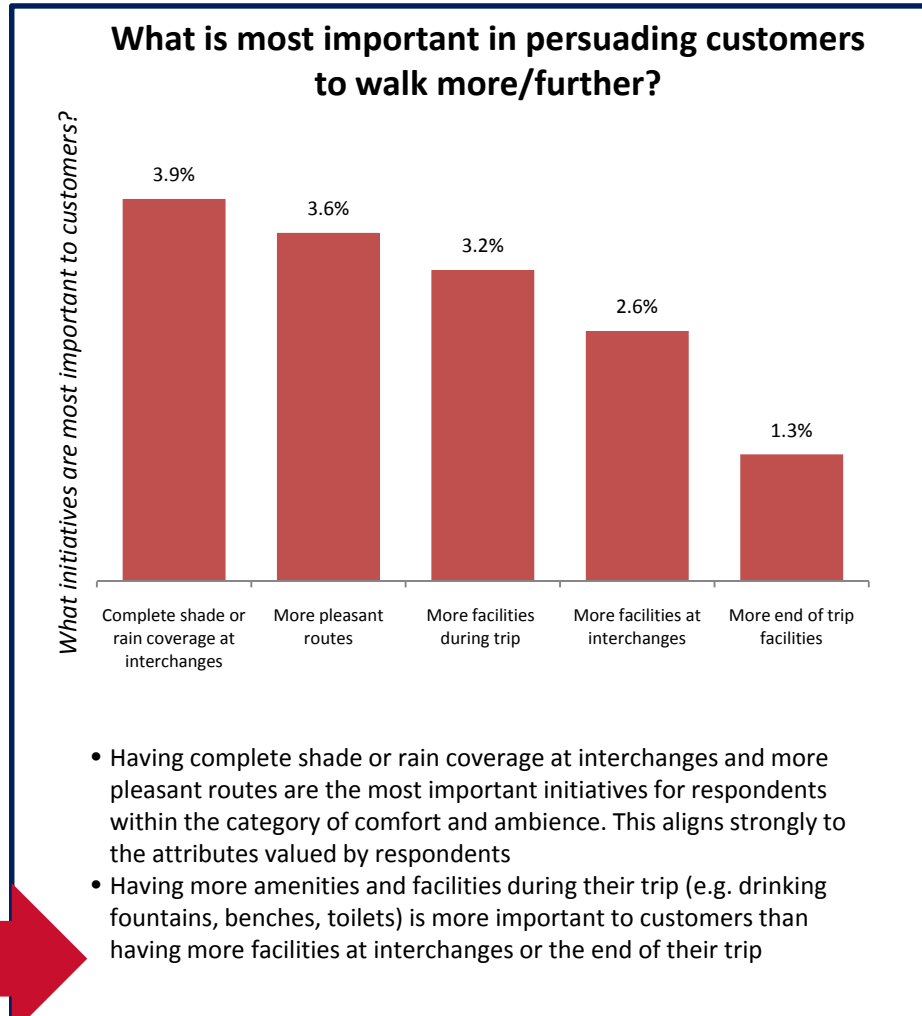
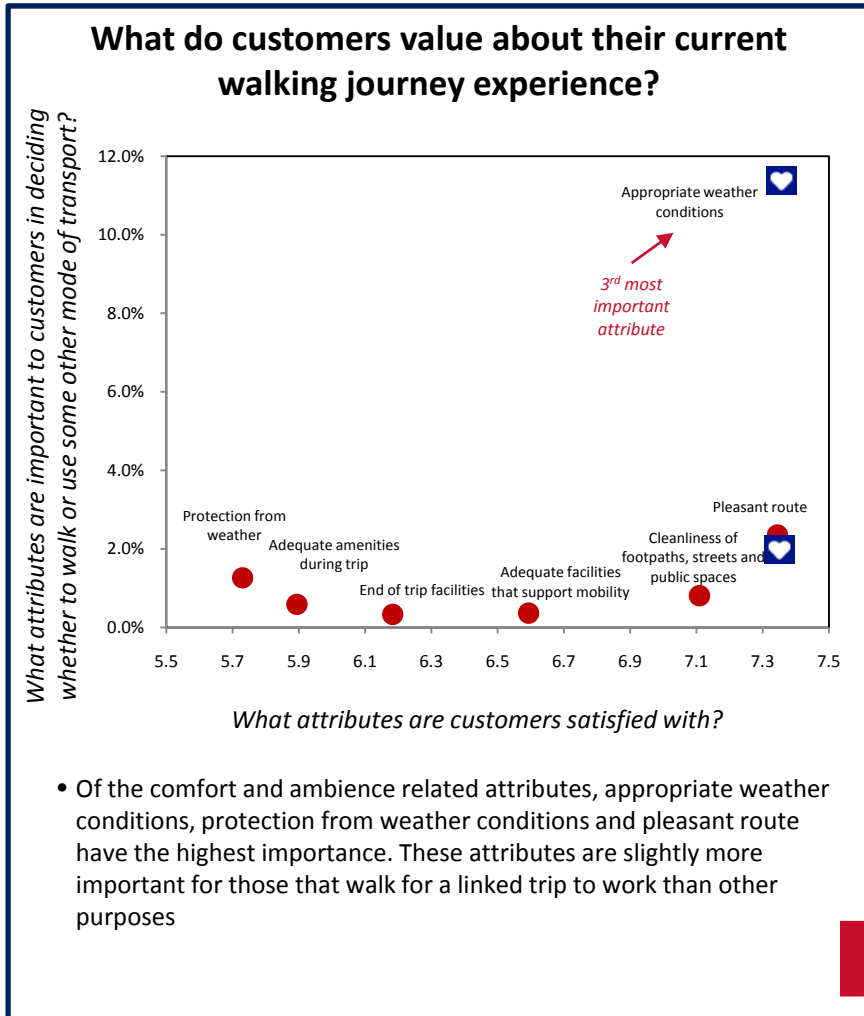
Note: Allocation attributes to the convenience category identified based on unprompted allocation by participants in the qualitative research

♥ Moment of Truth

Source: Transport for NSW, Walking CVP Research, June 2013

So what does it all mean?

**CONCLUSION:** Complete shade or rain coverage at interchanges and more pleasant routes are important initiatives for persuading customers to walk more however customer are dissatisfied with these aspects of their journey experience



Note: Allocation attributes to the comfort category identified based on unprompted allocation by participants in the qualitative research

Moment of Truth

Source: Transport for NSW, Walking CVP Research, June 2013

So what does it all mean?

How do needs differ across the NSW population?





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## 8. Needs and segmentation

*Identifying needs and initiatives important for persuading customers to walk more/further provides insight into understanding unique groups of customers*



1

## Trade-off of initiatives using MaxDiff scaling (form of conjoint analysis)

*Purpose: To identify areas that are most / least important in persuading individuals to walk more and/or further*

### Overview of approach:

- Respondents were shown 15 tasks, each with 6 sets of initiatives
- They were asked to identify which is most / least important for each task
- Analysis was then undertaken to identify prioritised list of initiatives

Example choice task shown to respondents:

Most important		Least important
	Campaigns to persuade people about benefits of walking	
○	Walking projects that promote mental and social benefits	
	Signage in and around city/town centres and interchanges	
	Increase enforcement of dangerous	
	Financial incentives and discounts for people who walk to work	○
	Easier access to walking times / better route information	

2

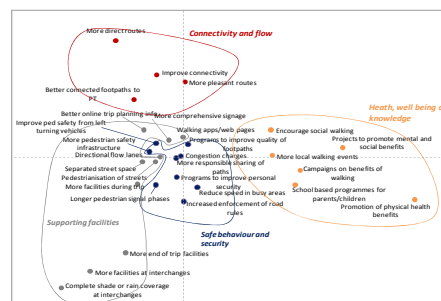
## Latent class analysis using MaxDiff scaling data

*Purpose: To identify and display similarities between initiatives (i.e. which initiatives are similarly found important by similar respondents)*

### Overview of approach:

- Undertake latent class analysis to identify groups of customer with similar underlying needs based on initiatives
- Display the common needs sets using correspondence analysis to produce a map of the initiatives with spatial distance between initiatives representing similarity

Example correspondence map displaying needs sets:



3

## Allocate respondents to needs set

*Purpose: Uses individual respondent estimates for importance weights and is derived from the latent class analysis*

### Overview of approach:

- Allocate each respondent to one needs set based on the sum of importances of the initiatives within that needs set being greater than for any of the other needs set

Example needs sets identify showing % of respondents allocated to each needs set:



**CONCLUSION:** There are four sets of needs that should be met in order that customers walk more often/further

## Customer needs



Supporting  
facilities

“I value comfort while walking supported by adequate facilities and amenities”

21% of respondents



Connectivity and flow

“I value a direct route and reduced delays”

28% of respondents



Pedestrian safety  
and personal security

“I value my safety and security through infrastructure improvements and the safe behaviour of other road users”

28% of respondents

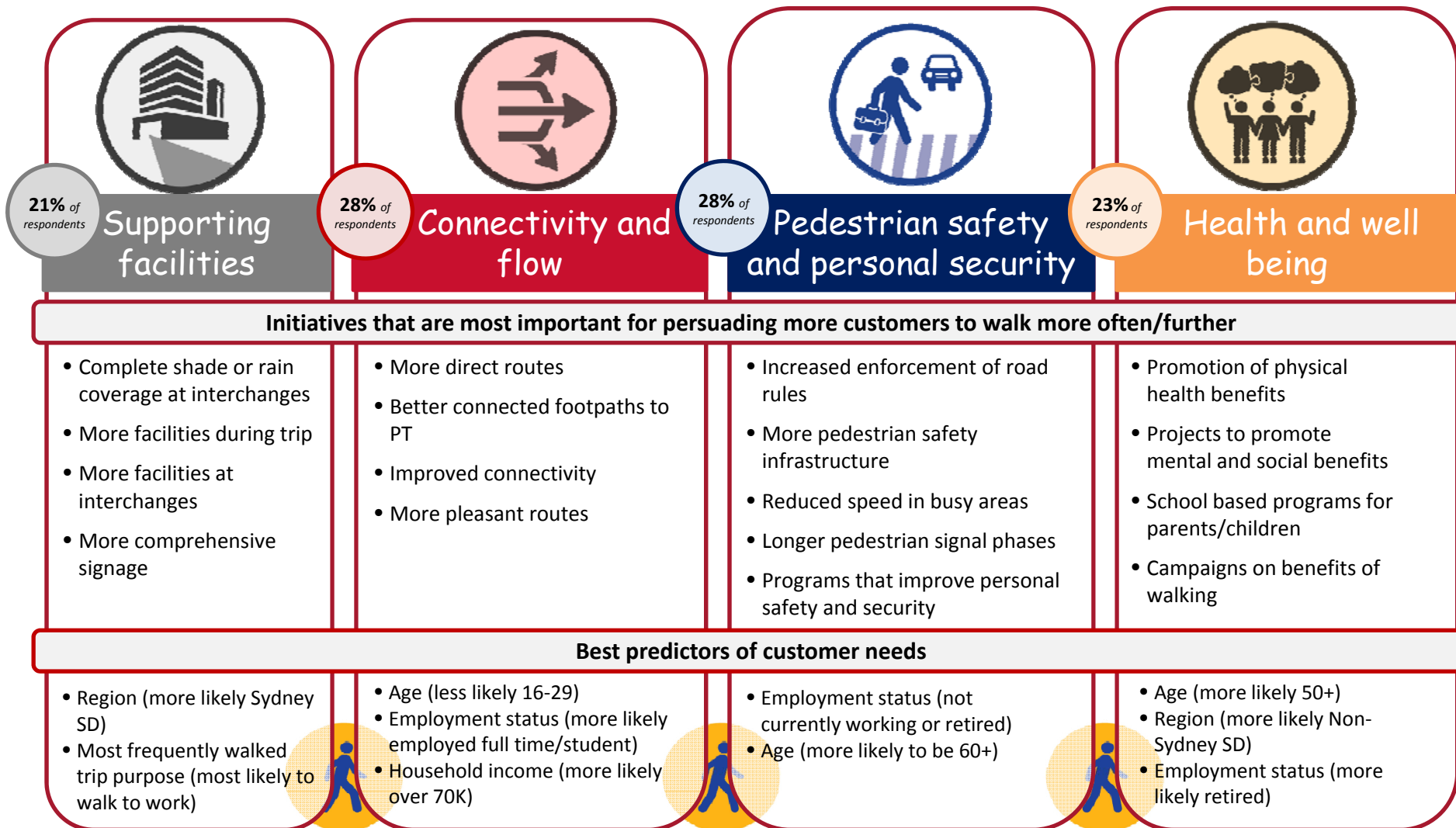


Health and well  
being

“I value the physical health and emotional well being benefits I get from walking”

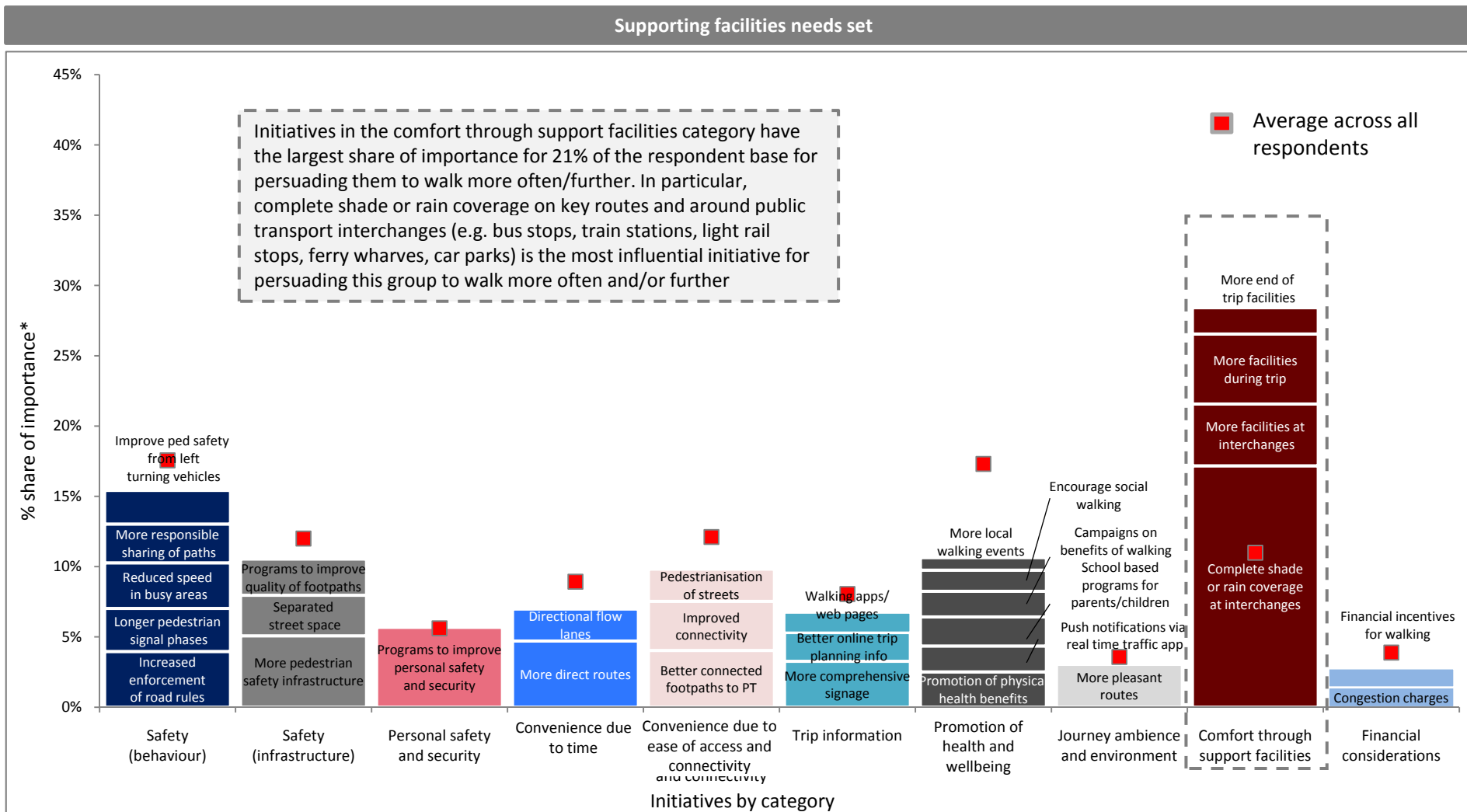
23% of respondents

**CONCLUSION:** Different initiatives that deliver across the four sets of needs are influential in persuading more customers to walk more/further





**CONCLUSION:** For 21% of customers, initiatives to improve **supporting facilities**, in particular complete shade or rain coverage, are most important in persuading them to walk more



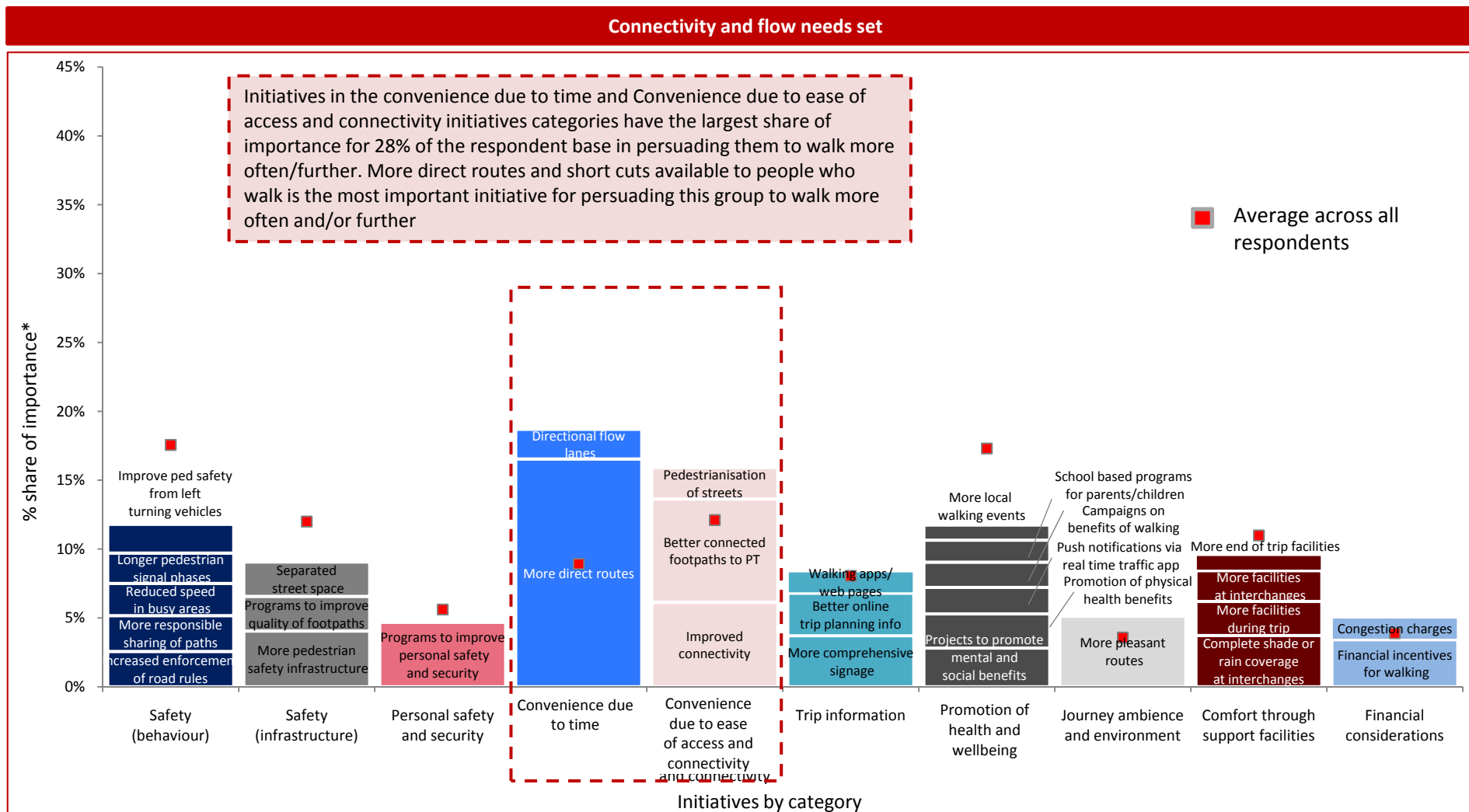
Note: n=261

Note\*:% share of importance represents weighted percentage of total share of importance based on trade-offs of initiatives that are most/least important for persuading respondents to walk more often/further

Source: Transport for NSW, Walking CVP Research, June 2013



**CONCLUSION:** For 28% of customers, initiatives relating to **connectivity and flow** in particular, more direct routes, are most important in persuading them to walk more

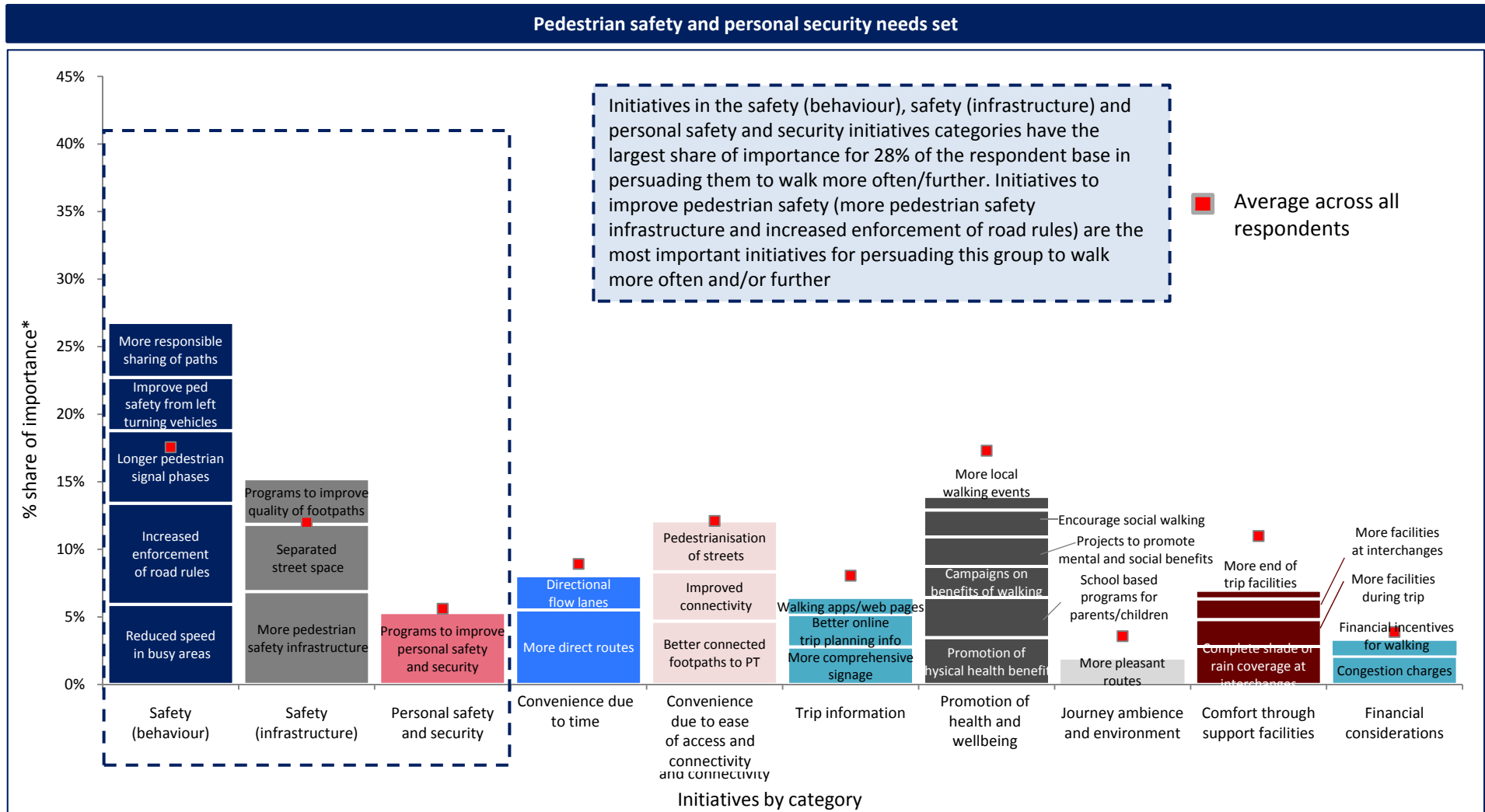


Note: n=322

Note\*: % share of importance represents weighted percentage of total share of importance based on trade-offs of initiatives that are most/least important for persuading respondents to walk more often/further

Source: Transport for NSW, Walking CVP Research, June 2013

**CONCLUSION:** For 28% of customers, **pedestrian safety and personal security** initiatives are most important in persuading them to walk more often/further



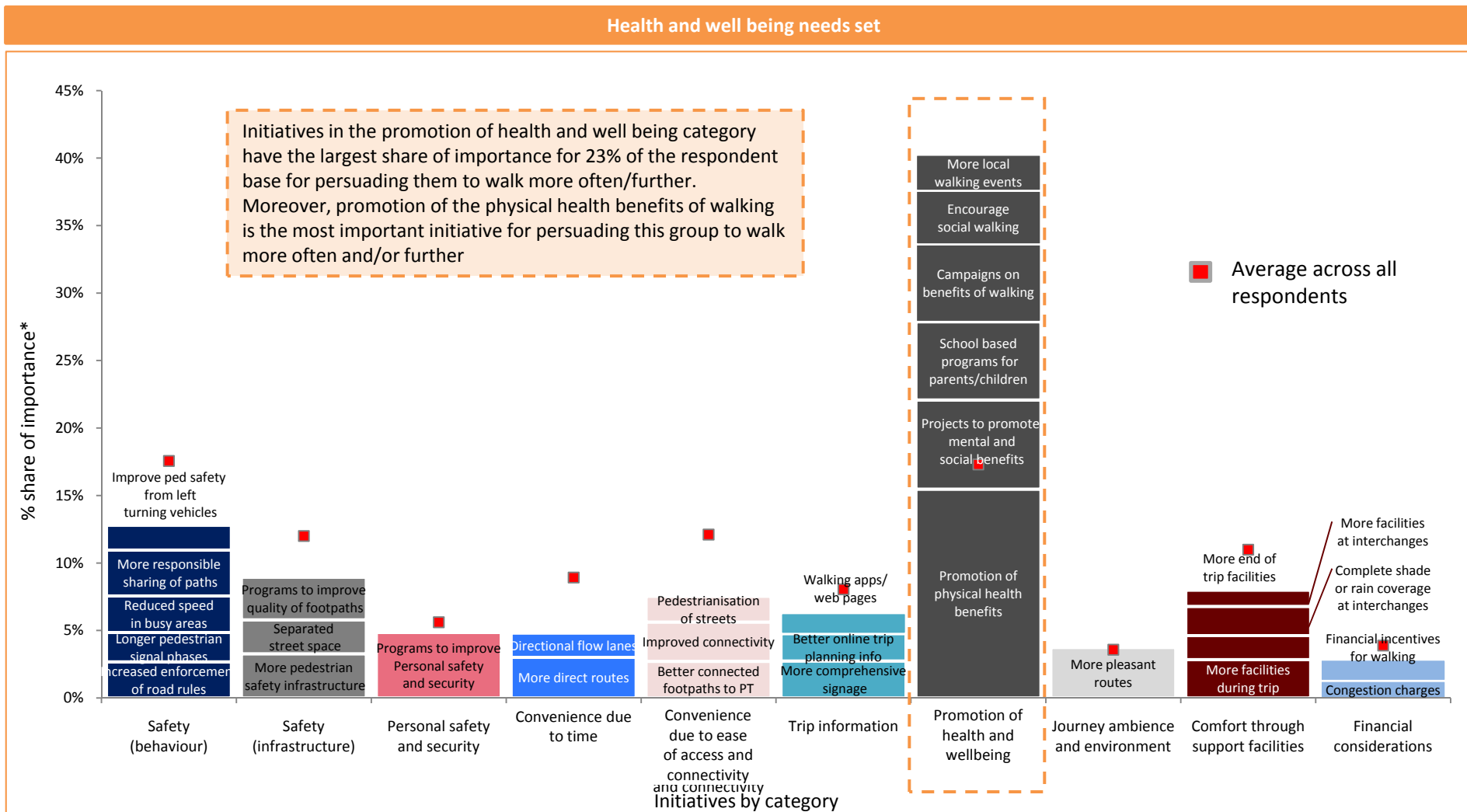
Note: n=345

Note\*: % share of importance represents weighted percentage of total share of importance based on trade-offs of initiatives that are most/least important for persuading respondents to walk more often/further

Source: Transport for NSW, Walking CVP Research, June 2013



**CONCLUSION:** For 23% of customers, initiatives relating to the promotion of **health and wellbeing** benefits of walking are most important in persuading them to walk more often/further



Note: n=275

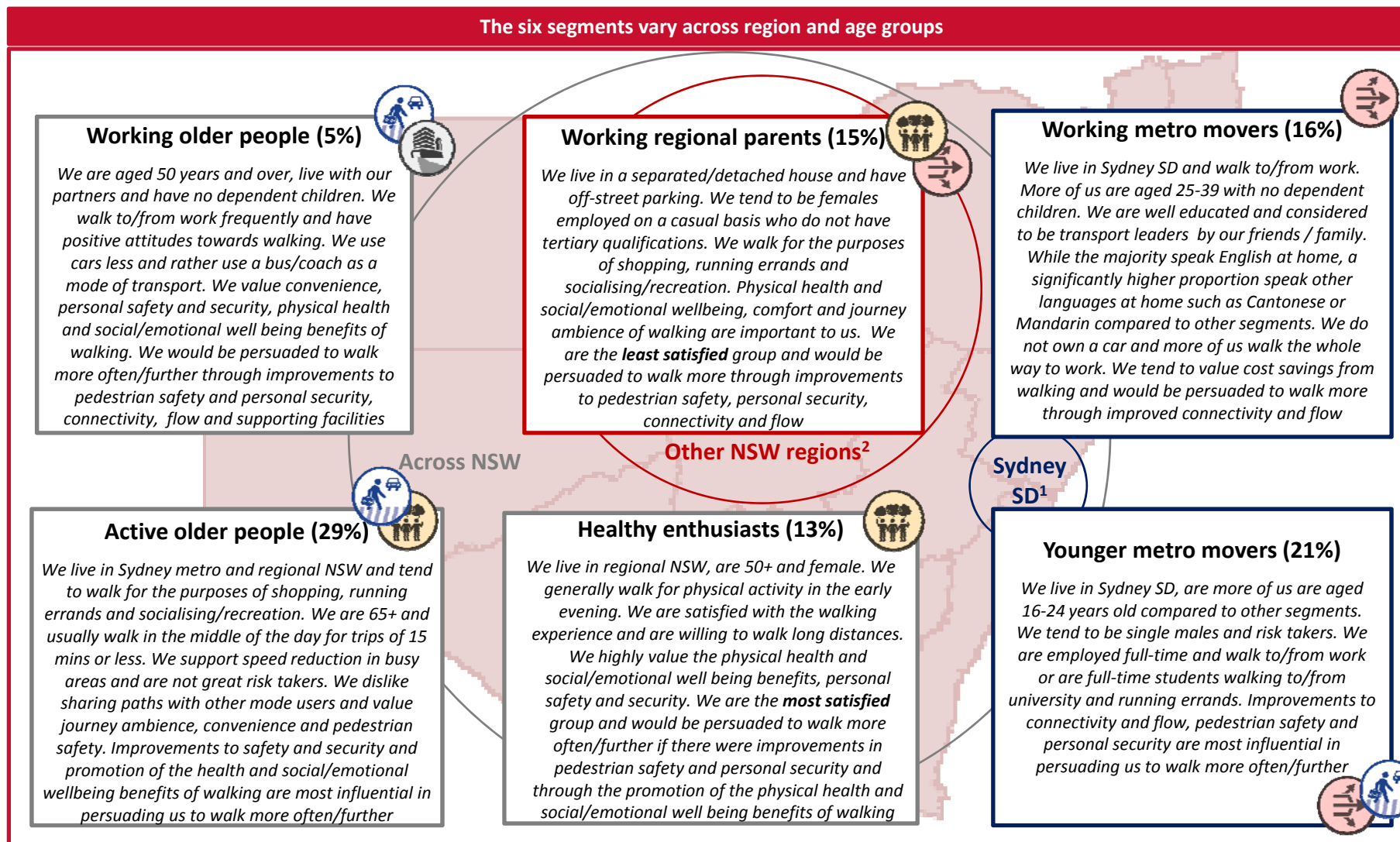
Note\*: % share of importance represents weighted percentage of total share of importance based on trade-offs of initiatives that are most/least important for persuading respondents to walk more often/further

Source: Transport for NSW, Walking CVP Research, June 2013



## CONCLUSION: Six unique segments have been identified in the NSW population, each finding different propositions more appealing than others

The six segments vary across region and age groups



<sup>1</sup>Sydney SD includes Inner Sydney, Parramatta, Penrith, Other Sydney

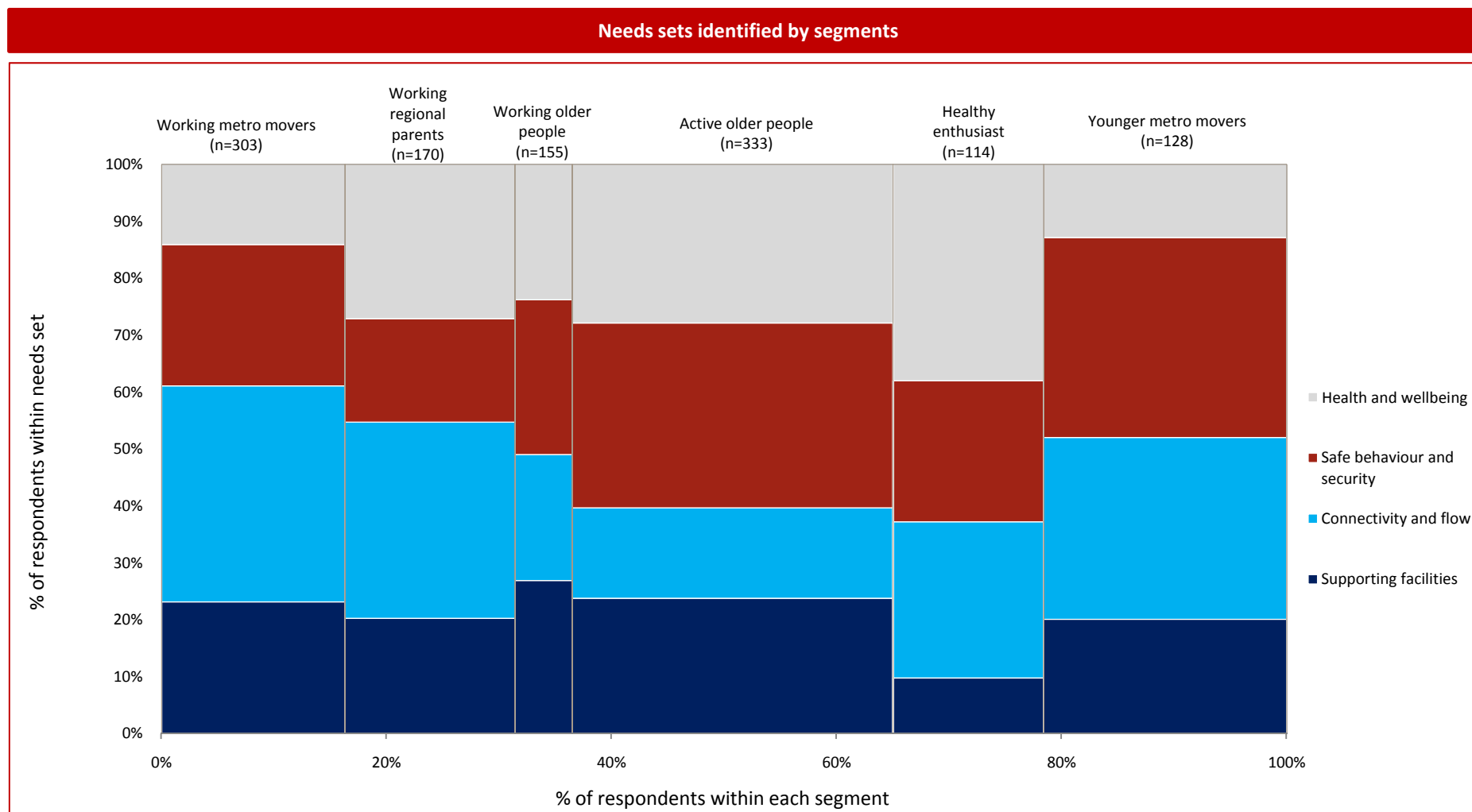
<sup>2</sup>Other NSW includes: Illawarra, Central Coast, Newcastle, Central West and Far West, Lower Illawarra, Southern, Murray-Murrumbidgee, Mid North Coast, New England and Northern Rivers Regions

Source: Transport for NSW, Walking CVP Research, June 2013





**CONCLUSION:** The four sets of needs are represented across the six customer segments but the proportions within each set varies



## Who are we?

- Majority live in **Sydney SD** (100%), in a **unit/flat** (44%, higher than all other segments), are **25-39 years old** (62%) and **do not have dependent children** (83%)
- Members of this segment are **equally likely to be male** (49%) or **female** (51%)
- Majority have achieved a **University / Post Graduate degree** (53%), are **employed full time** (59%) or part time (17%) and work in the **private sector** (62%) as a **professional** (41%) or **clerical or administrative worker** (21%)
- Members of this segment span all income brackets; a higher proportion have yearly household income >\$150k (16%) compared to other segments
- While the majority speak English at home (64%), a significantly higher proportion **speak other languages at home** compared to other segments (36%; 15% Cantonese/Mandarin)
- Higher proportion agree that family and friends often **ask their opinion** about transport (28%, higher than other segments)

## How do we travel?

- Members of this segment walk most frequently as part of a **linked trip to/from work** (58%) or the **whole way to/from work** (42%) and walk less frequently for the purpose of shopping (80%) and for physical activity (43%, lowest of all segments) less often
- Of those who travel most frequently as part of a linked trip to/from work, 63% usually connect to a **train** and 40% to a **bus**
- Generally walk **5+ times per week** (70%) on **weekdays only** (74%) for a distance that is **under 2km** on their way to their destination (83%) for **10-15 mins** (65%)
- The majority start their trip in the morning before 10am (78%) and return in the early evening between 5-7pm (42%)
- 22% **live less than 2km from their workplace** (the majority of which walk most frequently all the way to work) and 54% **live 5km or further from their workplace** of which the majority travel most frequently as part of a linked trip to work
- 43% **do not own a car** (though 20% have access to one) and the majority do not have **car parking available at work** (free or paid) (52%) and for business journeys during their work day, 19% receive reimbursement for public transport and 33% receive reimbursement for taxis
- The majority do not have a fitness/mobility issue that affects walking (93%)



## What journey experience attributes are more important to us?

### Financial considerations

- ★ Transport cost savings from walking instead of using a car or public transport

### Convenience due to ease of access and connectivity

- ★ Convenience of walking for connecting to public transport

### Safety (Infrastructure)

- ★ Adequate structures that support pedestrian safety (e.g. barriers, crossings)

## What are we more/less satisfied with than other segments?

Avg. satisfaction: 7.8/10

Interacting with community members (19% dissatisfied + very dissatisfied)

Ease and accessibility of walking to, between and around interchanges (78% satisfied + very satisfied)

Ease of access to work, education, or school (82% satisfied + very satisfied)

Transport cost savings from walking instead of using a car (83% satisfied + very satisfied)

## What would persuade us to walk more and/or further?



Connectivity and flow

- 1 More direct routes and short cuts available to people who walk
- 2 Better connected footpaths to more easily access public transport
- 3 Complete shade or rain coverage on key routes and around public transport interchanges
- 4 More pedestrian safety infrastructure (e.g. barriers, refuge islands, crossings)
- 5 Improve the connections of footpaths to each other and places of interest

Significantly more think they could be persuaded to walk more/further through their **workplaces** (33%), **websites** (28%) and through **SMS push notifications** (10%) compared to other segments and the majority would like to access information about walking through **websites** (49%), **TV** (29%) or **social media** (21%)



## Who are we?

- Majority live in **Sydney SD** (100%), in a **separated/detached house** (53%, higher than other dwelling types) and are single with **no dependent children** (65%)
- Members of this segment are **equally likely to be male** (58%) or **female** (42%) and compared to other segments, a significantly higher proportion are **16-24 years of age** (42%)
- Majority list their highest level of education as completing secondary school (32%) or some University (18%) and are **full-time students** (31%), employed full time, part time or casually (44%; of which 69% are employed in the private sector) or are unemployed (12%)
- Members of this segment generally have household incomes of less than \$70k per year (66%)
- While the majority speak English at home (69%), a significantly higher portion speak **other languages at home** compared to other segments (31%; 13% Cantonese/Mandarin)
- A significantly higher proportion compared to other segments (38%) believe it is fine **to take a few risks** on road/paths if it speeds up your journey

## How do we travel?

- Majority of this segment walk most frequently for **purposes other than travelling to/from work** such as getting to or from school/university/training/lessons (25%), shopping (28%) and running errands (21%) and travel for this purpose **every couple of days** (46%) or **every day** (28%) for **less than 1km** (53%) and on average their trip takes **5-15 minutes** (52%)
- When travelling for their most frequent purpose, 57% walk on **weekdays only** and 37% walk on **both weekdays and weekends** and the majority start walking between **8am-12pm** (58%) and return between **2-7pm** (53%)
- Majority of this segment **own a car** (60%) yet significantly more **do not have a license** (15%) compared to other segments
- Almost all members of this segment (95%) have car parking available at home (on or off street)
- The majority do not have a fitness/mobility issue that affects walking (93%)



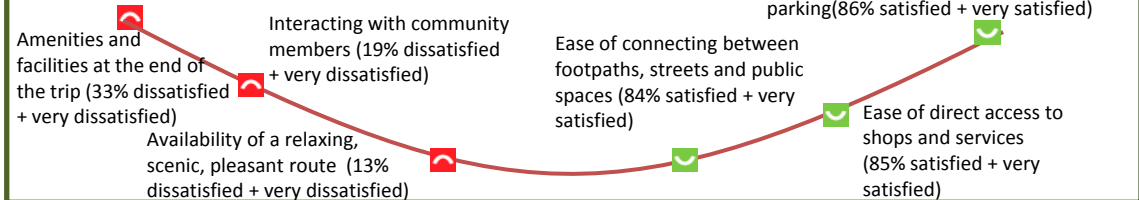
## What journey experience attributes are more important to us?

### Convenience due to time

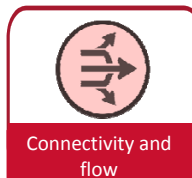
- ★ Distance of the trip
- ★ Time required to walk the trip
- ★ More convenient than other modes of transport

## What are we more/less satisfied with than other segments?

**Avg. satisfaction: 7.9/10**



## What would persuade us to walk more and/or further?



- 1 More direct routes and short cuts available to people who walk
- 2 More pedestrian safety infrastructure (e.g. barriers, refuge islands, crossings)
- 3 Programs that improve personal safety and security (e.g. better street lighting, no dark corners on routes, people around)
- 4 Better connected footpaths to more easily access public transport
- 5 Improve the connections of footpaths to each other and places of interest



More believe they could be persuaded to walk to walk more and/or further through communications on **TV** (38%), **social media** (30%) and/or through **word of mouth** (30%) and the majority would like to access information about walking through **websites** (53%), **TV** (30%), **email** (23%) or **social media** (23%)



## Who are we?

- A high proportion live in **outer Sydney regions** (52%) and **regional NSW** (48%), in a **separated/detached house** (86%, highest among all segments), are **30-49 years old** (61%), and **have dependent children** (36%, higher than any other segment)
- Members of this segment are **equally likely to be female** (55%) or **male** (45%)
- 35% list **TAFE/Tertiary college** as their highest level of education, 36% are employed full-time and a larger percentage are **employed on a casual basis** (17%) compared to other segments
- Members of this segment are likely to be **clerical or administrative workers** (30%) or **professionals** (27%) and more are employed in the **public sector** (28%) compared to other segments
- Members of this segment span all income brackets with the median having yearly household incomes of \$70k-\$80k
- For the majority, **English** is the only language they speak at home (94%)
- A higher proportion **do not support** introducing congestion charges for driving (56%) and are **annoyed** by the lack of pedestrian space (50%)

## How do we travel?

- Majority walk most frequently for **purposes other than trips to/from work** (61%) including shopping (22%), running errands (15%) and socialising/recreation (12%) and generally travel for this purpose every couple of days (40%) or **5+ times per week** (46%)
- 22% have walked for the whole trip to/from work in the last month but this is not their most frequent trip purpose
- A higher proportion walk for their most frequent trip purpose on **weekends only** (18%) compared to other segments of a distance **less than 2km** (64%) for **less than 15 minutes** on average (52%) and leave between 8am-12pm (51%) on the way to their destination and return in the afternoon between 2-5pm (41%)
- Majority **own or have access to a car** (88%) and 74% also drive for their most frequent trip purpose (higher than other segments)
- Of those who work, 50% **live more than 4km from their workplace** and 47% have **car parking available at their workplace** paid for by their employer
- Of those with dependent children, 75% identify that **their children** walk to school once a week or more often and 52% live **less than 2km** from their children's school



## What journey experience attributes are more important to us?

### Physical health and social/emotional wellbeing

- ★ Time spent with others whilst walking (e.g. children/partner/family/friends)

### Comfort through support facilities

- ★ Adequate shelter and protection from weather conditions

### Journey ambience and environment

- ★ Cleanliness of the footpaths, streets and public spaces (e.g. levels of graffiti, fly posting, litter)

## What are we more/less satisfied with than other segments?

Avg. satisfaction: **7.5/10**

Adequate structures that support pedestrian safety (29% dissatisfied + very dissatisfied)

Waiting time at traffic signals to cross the road (70% satisfied + very satisfied)

Benefits to the environment of more people walking (80% satisfied + very satisfied)

Clear route, free of obstructions (81% satisfied + very satisfied)

Adequate facilities that support mobility and different abilities (28% dissatisfied + very dissatisfied)

## What would persuade us to walk more and/or further?



Connectivity and flow



Health, well being and knowledge

- 1 More direct routes and short cuts available to people who walk
- 2 Better connected footpaths to more easily access public transport
- 3 Improve the connections of footpaths to each other and places of interest
- 4 Projects that promote the physical health benefits of walking (e.g. preventing obesity, diabetes, coronary heart disease) and get more people walking
- 5 Walking projects that promote mental and social benefits



Significantly more think they could be persuaded to walk more through **social media** (42%), **children/children's school** (33%) and through **SMS push notifications** (11%) compared to other segments and the majority would like to access information about walking through **websites** (39%), **TV** (39%) and/or **social media** (33%)



## Who are we?

- The highest proportion live in **Sydney SD** (51%) with the remainder equally distributed across **outer Sydney regions** (22%) and **regional NSW** (27%)
- All are over **50 years of age** with the majority aged **50-59 years old** (81%, highest among all segments) and **have a partner** but no dependent children (43%) and are **single/divorced/windowed** with no dependent children (32%)
- Members of this segment are **equally likely to be female** (53%) or **male** (47%)
- 41% have completed a **university degree or higher qualification** and 32% have a **TAFE or Tertiary college** qualification
- Majority are employed **full-time** (52%) or part time (17%) as **professionals** (30%) or **clerical and administrative workers** (17%) in the **private sector** (60%) and have annual household **incomes spanning a wide range** of income brackets
- For the majority, **English** is the only language they speak at home (93%)
- Members of this segment generally have **positive attitude** towards walking and believe that walking is part of journey to work is not limited to those who live near the city (53%, significantly higher than other segments)

## How do we travel?

- A higher proportion walk most frequently the **whole way to/from work** (46%) or as **part of a linked trip to/from work** (54%) and of those who walk as part of a linked trip, the majority connect to a **bus/coach** (47%) or **train** (32%)
- A higher proportion walk **5 days a week or more often** (61%) or **2-4 times a week** (28%) for their most frequent trip purpose on **weekdays** only (64%) across distances of less than **1km** (55%) with average trip times **less than 10mins** (52%)
- The majority start their journey to work between **5-10am** (85%) and return between **2-7pm** (71%)
- 77% **own to a car** however less have **car parking** available at their workplace (paid and unpaid) (55%) and **fewer have ever driven a car** for all or part of their trip to work (51%) compared to other segments
- 20% have a **fitness/ mobility issue or a registered disability** that affects walking and of these, 16% use a **walking frame or sticker** and 9% use a **wheelchair**



## What journey experience attributes are more important to us?

### Convenience due to ease of access and connectivity

- ★ Ease of access to work, education, or school

### Personal safety and security

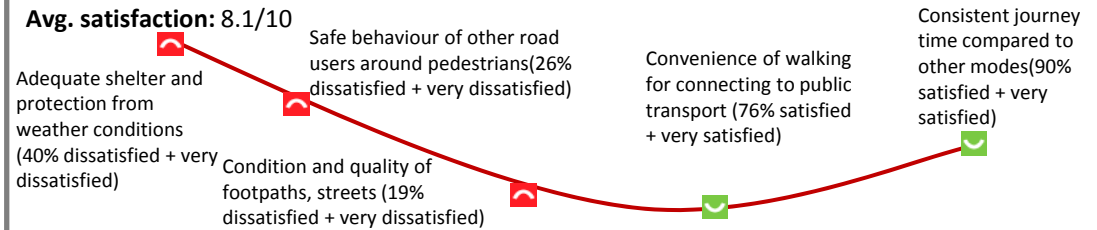
- ★ Adequate street lighting

### Physical health and social/emotional wellbeing

- ★ Time spent alone

## What are we more/less satisfied with than other segments?

Avg. satisfaction: 8.1/10



## What would persuade us to walk more and/or further?



- 1 Programs that improve personal safety and security (e.g. better street lighting, no dark corners on routes, people around)
- 2 More pedestrian safety infrastructure (e.g. barriers, refuge islands, crossings)
- 3 Increase enforcement of road rules and illegal parking that endangers pedestrians
- 4 Complete shade or rain coverage on key routes and around public transport interchanges e.g. bus stops, train stations, light rail stops, ferry wharves, car parks
- 5 More direct routes and short cuts available to people who walk



More believe they could be persuaded to walk to walk more and/or further through communications on **TV** (44%) and **through health services** (36%) and the majority would like to access information about walking through **websites** (42%), **TV** (35%), **health services** (29%) or **newspapers** (23%)





## Who are we?

- Majority live in **Sydney SD** (51%) and more live in the Mid North Coast, New England and Northern Rivers regions (18%) than any other segment
- Members of this segment are equally likely to be **female** (52%) or **male** (48%) and are all over **50** years of age with the majority aged **65+** (59%) and 92% **only speak English** at home
- Majority live in a **separate or detached house** (70%) and a larger proportion do not **have dependent children** (87%) compared to other segments
- Members of this segment generally have **lower levels of education** (35% record their highest level of education as completed or some secondary school and 35% have a TAFE/tertiary college qualification) are **retired** (57%) and have annual household **income below \$50k** (58%, higher than other segments). Of those who work (full time, part time or casually, 11%), the majority work in the **private sector** (66%)
- Majority **support** reducing speed in busy city/town centres (56%), believe that walking is a great way to improve health and save costs (90%), **hate** sharing paths with bicycle riders(65%) and scooters etc (56%) and do **not tend to take risks** on the roads (88%). Generally, friends and family are less likely to ask their opinion about transport (53%)

## How do we travel?

- All most frequently walk for purposes other than travelling to/from work including **shopping (44%), socialising or recreation (20%) and running errands (21%)**
- Majority walk **every couple of days** (49%) or once per week (18%) on **both weekdays and weekends** (53%) for their most frequent trip purpose for distance of **less than 2km** (76%) taking **20 minutes or less** (73%)
- They are more likely to start the trip later in the morning between **10am–12pm** (38%, higher than any other segment) and return any time between **10am-5pm** (75%, higher than other segments)
- Majority are **car owners** (86%), have **off street parking** available at home (93%, higher than any other segment) and **also drive** on occasion for trips they could walk (77%)
- A larger percentage have **fitness/mobility issues or a registered disability** compared to other segments(35%; fitness issue 18%, mobility issue 16% and registered disability 8%) and of these, 87% do not have a walking aid and 11% have a walking frame or walking stick



## What journey experience attributes are more important to us?

### Journey ambience and environment

- ★ Appropriate weather conditions for walking

### Convenience due to ease of access and connectivity

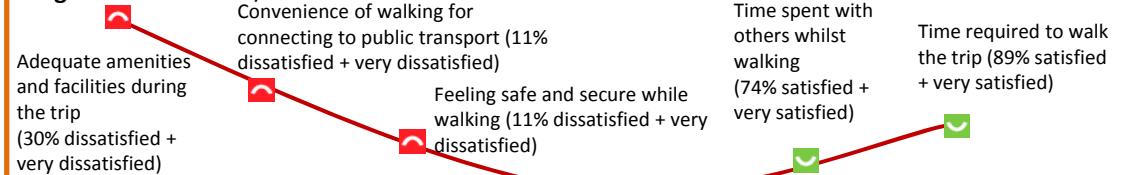
- ★ Ease of direct access to shops and services

### Safety (infrastructure)

- ★ Condition and quality of footpaths, streets

## What are we more/less satisfied with than other segments?

Avg. satisfaction: 8.1/10



## What would persuade us to walk more and/or further?



Health, well being and knowledge



Safe behaviour and security

- 1 Projects that promote the physical health benefits of walking (e.g. preventing obesity, diabetes, coronary heart disease) and get more people walking
- 2 Programs that improve personal safety and security (e.g. better street lighting, no dark corners on routes, people around)
- 3 Increase enforcement of road rules and illegal parking that endangers pedestrians
- 4 More pedestrian safety infrastructure (e.g. barriers, refuge islands, crossings)
- 5 Longer time given for pedestrians to cross at traffic signals



Significantly more think they could be persuaded to walk more/further through **health services** (47%), **newspapers** (37%) and **get healthy information and coaching services** (26%) compared to other segments and significantly more would like to access information about walking through **health services** (37%), **newspapers** (36%) and/or **word of mouth** (34%)

## Who are we?

- Members of this segment live in regions **throughout NSW** (38% in regional NSW, 37% in Sydney SD) in a separate or detached house (74%)
- Majority are over **50 years of age** (56%) with 8% younger than **25 years of age**
- Members of this segment are slightly more like to be **female** (57%) than male (43%) do not have **dependent children** (72%)
- 53% are currently **employed** (full time, part time, casually or self employed), retired (27%) and a larger percentage are **performing full time home duties** (11%) compared to other segments
- Of those who are employed, the majority are employed in the private sector (55%) and 30% are **professionals**, 18% are clerical and administrative workers and 12% are technician/trade workers
- Highest level of **education spans** some/completed secondary school (24%) to University/postgraduate degree (41%) and annual household incomes span a **variety of income brackets**
- While attitudes towards walking are not significantly different to other segments, a high proportion believe that getting more people walking is a great way to improve the health of the population and save costs (89%)

## How do we travel?

- All walk most frequently for **physical activity** with no transport purpose
- Majority walk for physical activity on **both weekdays and weekends** (63%), in the morning before 12pm (57%) and a larger percentage walk in the early evening between **5-7pm** (24%) compared to other segments
- Average trip distance and trip time tends to be longer than other segments. Significantly higher proportion currently **walk more than 3km** (41%) for more than 30 minutes (62%) for physical activity and the majority feel they could walk **more than 5km** (53%) and/or more than **45mins (85%)** for this purpose
- Majority are **car owners** (87%) and have **off street parking** available at home (91%)
- A high proportion live further than 4km from their nearest city/town (46%) and of those who work, 61% live further than 5km from their workplace and 56% have parking at work paid for by their employer
- 14% have a **fitness issue** that affects walking and 8% have a mobility issue or a registered disability that affects walking



## What journey experience attributes are more important to us?

### Physical, social and emotional wellbeing

- Physical health benefits of walking



### Personal safety and security

- Feeling safe and secure while walking



### Physical, social and emotional wellbeing

- Emotional well being, relaxation and productivity



## What are we more/less satisfied with than other segments?

**Avg. satisfaction: 8.6/10**

Cleanliness of the footpaths, streets and public spaces (14% dissatisfied + very dissatisfied)



Distance of the trip (89% satisfied + very satisfied)



Availability of a relaxing, scenic, pleasant route (87% satisfied + very satisfied)



Emotional well being, relaxation and productivity (92% satisfied + very satisfied)



Physical health benefits of walking (94% satisfied + very satisfied)



## What would persuade us to walk more and/or further?



Health, well being and knowledge

- 1 Projects that promote the physical health benefits of walking (e.g. preventing obesity, diabetes, coronary heart disease) and get more people walking
- 2 Education programs in schools / for parents about the benefits of children walking to school, including how to walk to school safely
- 3 Walking projects that promote mental and social benefits
- 4 Campaigns to persuade people about the benefits of walking to the transport system and them personally (e.g. faster travel time, improved health, reduced road building costs and environmental savings)
- 5 Projects to encourage social aspects of walking with others (i.e. family, friends, walking groups, other community members)



More believe they could be persuaded to walk to walk more and/or further through **health services** (40%), **TV** (40%) and **word of mouth** (39%) and the majority would like to access information about walking through **websites** (42%), **TV** (31%), **word of mouth** (27%) or **newspapers** (25%)

How do these findings compare to previous research?







Transport  
for NSW

# 9. Integrated research insights



## INSIGHT: Customers appear to be dissatisfied with attributes relating to safety and having greater pedestrian safety may persuade customers to walk more and/or further

### Safety (behaviour and infrastructure)

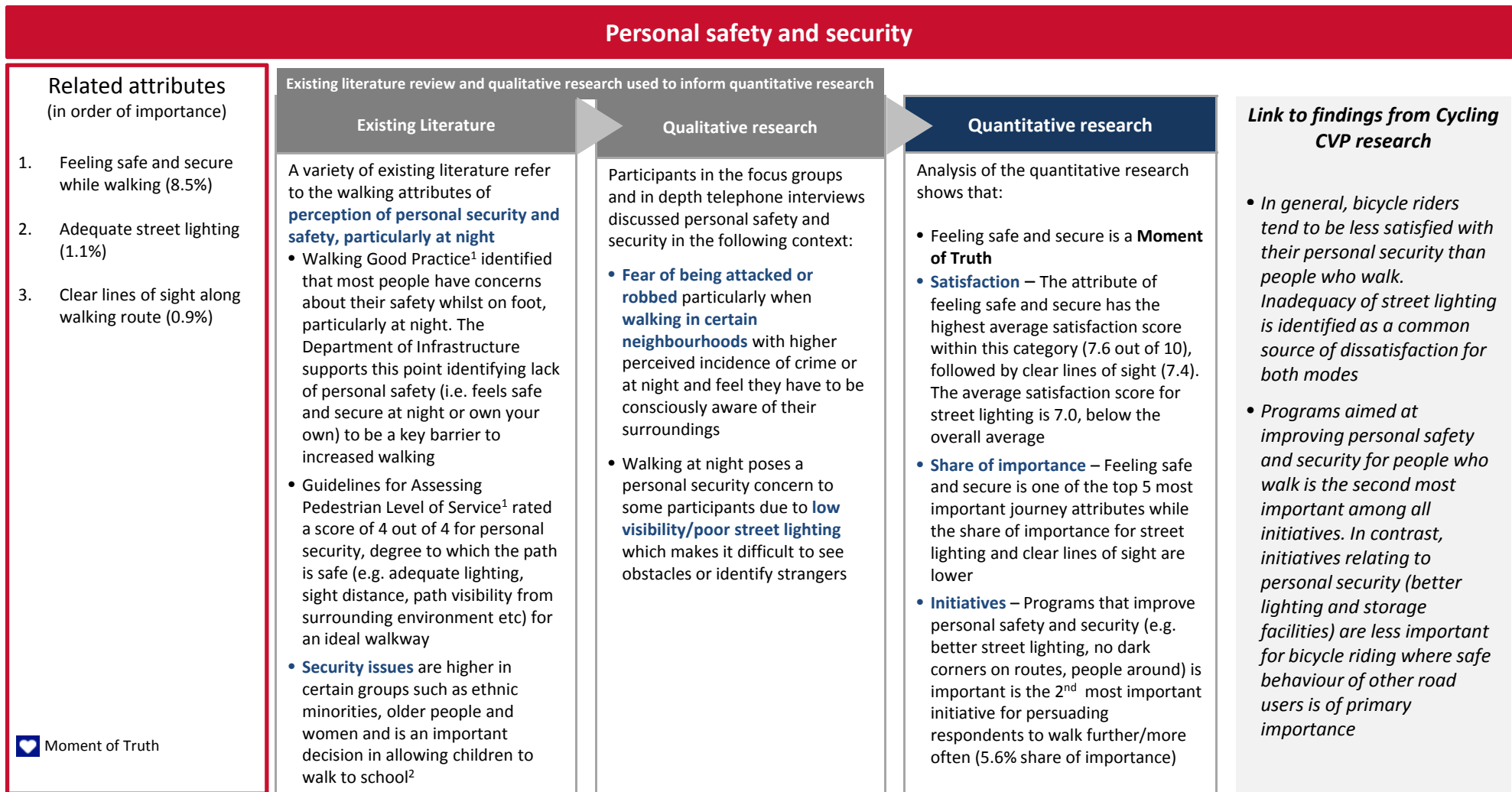
Related attributes (in order of importance)	Existing literature review and qualitative research used to inform quantitative research			Link to findings from Cycling CVP research
	Existing Literature	Qualitative research	Quantitative research	
<ol style="list-style-type: none"> <li>Condition and quality of footpaths, streets, and public spaces (1.9%)</li> <li>Safe behaviour of road users around pedestrians (1.4%)</li> <li>Adequate structures that support pedestrian safety (0.6%)</li> <li>Ability to share pathways, streets and public spaces with other users safely (0.6%)</li> <li>Clear route, free of obstructions (0.5%)</li> </ol>	<ul style="list-style-type: none"> <li>Analysis of existing literature includes reference to the <b>provision of infrastructure to improve feelings of safety and security</b> in particular, street lights and separation from cars were identified as important for supporting safety while walking</li> <li><b>Improved safety initiatives</b> (as part of Key Walking Routes) were suggested in Walking Good Practice<sup>1</sup> including the removal of clutter and support from local police and community support officers</li> <li><b>Fear and feelings of vulnerability</b> prevent people from choosing to walk, especially after dark. Busy roads and an unappealing urban environment were all seen to contribute to feelings of vulnerability particularly among people from low income groups and people with a disability<sup>2</sup></li> <li><b>Crossing aids</b> such as a pedestrian refuge or signalised crossings, crossing design such as reducing crossing widths through reduced number of lanes, reduced lane widths or sidewalk extensions into traffic lanes increase the perceptions of safety as drivers tend to slow down in shared spaces and public realms<sup>3</sup></li> </ul>	<p>Participants in the focus groups and in depth telephone interviews discussed safety (behaviour and infrastructure) issues in the following context:</p> <ul style="list-style-type: none"> <li><b>Safety concerns due to behaviours of other road users</b>, in particular the behaviour of drivers at crossings and driveways and the behaviour of cyclists on shared paths</li> <li>Safety in relation to infrastructure, in particularly <b>the quality and condition of footpaths</b> which extended to tripping hazards, obstructions and, in the CBD, crowding on footpaths, which was described as a source of frustration</li> </ul>	<p>Analysis of the quantitative research shows that:</p> <ul style="list-style-type: none"> <li><b>Satisfaction</b> – Overall satisfaction with safety (behaviour and infrastructure) attributes is below average. Respondents are least satisfied with safe behaviour of road users around pedestrians (average satisfaction of 6.9 out of 10) and are most satisfied with clear route (average satisfaction of 7.5 out of 10) compared to the other safety (behaviour and infrastructure) related attributes</li> <li><b>Share of importance</b> – Although safety was identified as one of the most important attributes in existing literature, share of importance is low when compared to other journey attributes. Of the safety related attributes, condition and quality of footpaths, streets and public spaces is most important (1.9% share of importance)</li> <li><b>Initiatives</b> – Safety (behaviour and infrastructure) related initiatives are important for persuading respondents to walk further/more often in particular, more pedestrian safety infrastructure is the third most important initiative</li> </ul>	<p><b>Link to findings from Cycling CVP research</b></p> <ul style="list-style-type: none"> <li><i>In general, bicycle riders expressed greater safety concerns than people who walk. While all safety attributes related to infrastructure are identified as Moments of Truth for bicycle riding, none are identified as Moments of Truth for people who walk</i></li> <li><i>Respondents are highly dissatisfied with the behaviours of other road users across active modes</i></li> <li><i>For both walking and bicycle riding, respondents are less satisfied with the safety aspects relating to infrastructure</i></li> <li><i>Initiatives aimed to increase safety through improving infrastructure are important for persuading respondents to walk more often/further and to ride a bicycle</i></li> </ul>

<sup>1</sup>Walking Good Practice, Transport for London, 2012

<sup>2</sup>Transport for London, Travel in London, Report 2, 2010

<sup>3</sup> AECOM, NSW Walking Strategy, Literature Review, 2011

## INSIGHT: Feeling safe and secure is identified as a Moment of Truth and programs that improve personal safety and security are identified as influential initiatives






<sup>1</sup> Guidelines for Assessing Pedestrian Level of Service , Main Roads Western Australia, 2006

<sup>2</sup> AECOM, NSW Walking Strategy, Literature Review, 2011

## INSIGHT: Trip distance and time are key determinants for selecting walking as a mode of transport and having more direct routes and short cuts are important for persuading more customers to walk more often and/or further

### Convenience due to time

Related attributes (in order of importance)	Existing literature review and qualitative research used to inform quantitative research			Link to findings from Cycling CVP research
	Existing Literature	Qualitative research	Quantitative research	
1. Distance of the trip (12.5%) 	<ul style="list-style-type: none"> <li>• <b>Distance</b> to be travelled and <b>time</b> taken (including delays such as lights and number of crossings available) were identified as important attributes when choosing to walk over other modes in existing literature</li> </ul>	<p>Participants in the focus groups and in depth telephone interviews discussed convenience due to time in the following context:</p> <ul style="list-style-type: none"> <li>• <b>Time</b> and <b>distance</b> of the trip are determinants for selecting walking as a mode of transport</li> </ul>	<p>Analysis of the quantitative research shows that:</p> <ul style="list-style-type: none"> <li>• Distance of the trip, time required to walk the trip and greater convenience than other modes of transport are <b>Moments of Truth</b></li> </ul>	<p><b>Link to findings from Cycling CVP research</b></p> <ul style="list-style-type: none"> <li>• Across both active modes, respondents appear to be satisfied with trip distance, trip time and consistency of trip time</li> <li>• Waiting time at traffic signals is a source of lower satisfaction for respondents. Increasing the priority of bicycles at intersections is valued by bicycle rides</li> <li>• Trip distance is consistently identified as an important attribute for walking and bicycle riding. Trip time is also considered important for walking</li> <li>• Respondents believe they will be persuaded to walk or ride a bicycle through introducing more direct routes</li> </ul>
2. Time required to walk the trip (9.0%) 	<ul style="list-style-type: none"> <li>• Barriers to walking identified include <b>perceptions of time, distance</b> and the convenience of other modes, particularly the car (<i>Travel in London Report 2</i><sup>1</sup>)</li> </ul>	<ul style="list-style-type: none"> <li>• Walking can be a more <b>time efficient</b> way to travel, particularly for short trips as the end to end journey time is reduced by saving the hassle of preparation, finding car parking and delays in congested traffic</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Satisfaction</b> – Higher satisfaction with trip distance, consistent journey time, trip time and avoiding need for car parking with satisfaction score above average while satisfaction for waiting time at traffic signals is below the overall average</li> </ul>	
3. Avoiding need for finding/paying for car parking (3.1%)	<ul style="list-style-type: none"> <li>• Household Travel Survey<sup>2</sup> identified that commute trips accounted for a much greater share of travel distance and time indicating that people tended to travel longer to get to work than for other activities</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Predictability</b> of travel time is a benefit of walking over other modes which may be affected by traffic congestion and public transport delays</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Share of importance</b> – Trip distance has the highest share of importance in this category. When compared to other journey attributes, consistent journey time and waiting time at traffic signals have lower importance</li> </ul>	
4. More convenient than other modes of transport (2.9%) 	<ul style="list-style-type: none"> <li>• City of Sydney and NSW Gov Memorandum of Understanding (MOU) agreed on <b>reducing wait time</b> for pedestrians in peak periods in <i>Walking for travel and recreation in NSW</i><sup>3</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Easy access to public transport</b> makes walking as part of a linked trip convenient</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Initiatives</b> – More direct routes and short cuts available to people who walk is the most important initiative for persuading respondents to walk more and/or further (6.4% share of importance)</li> </ul>	
5. Consistent journey time compared to other modes (1.2%)	<ul style="list-style-type: none"> <li>• Moreover, <b>longer distances</b> was identified as a barrier to walking in rural communities where distance and social isolation typically resulted in lower physical activity participation rates<sup>4</sup></li> </ul>			
6. Waiting time at traffic signals to cross the road (0.4%)				

 Moment of Truth

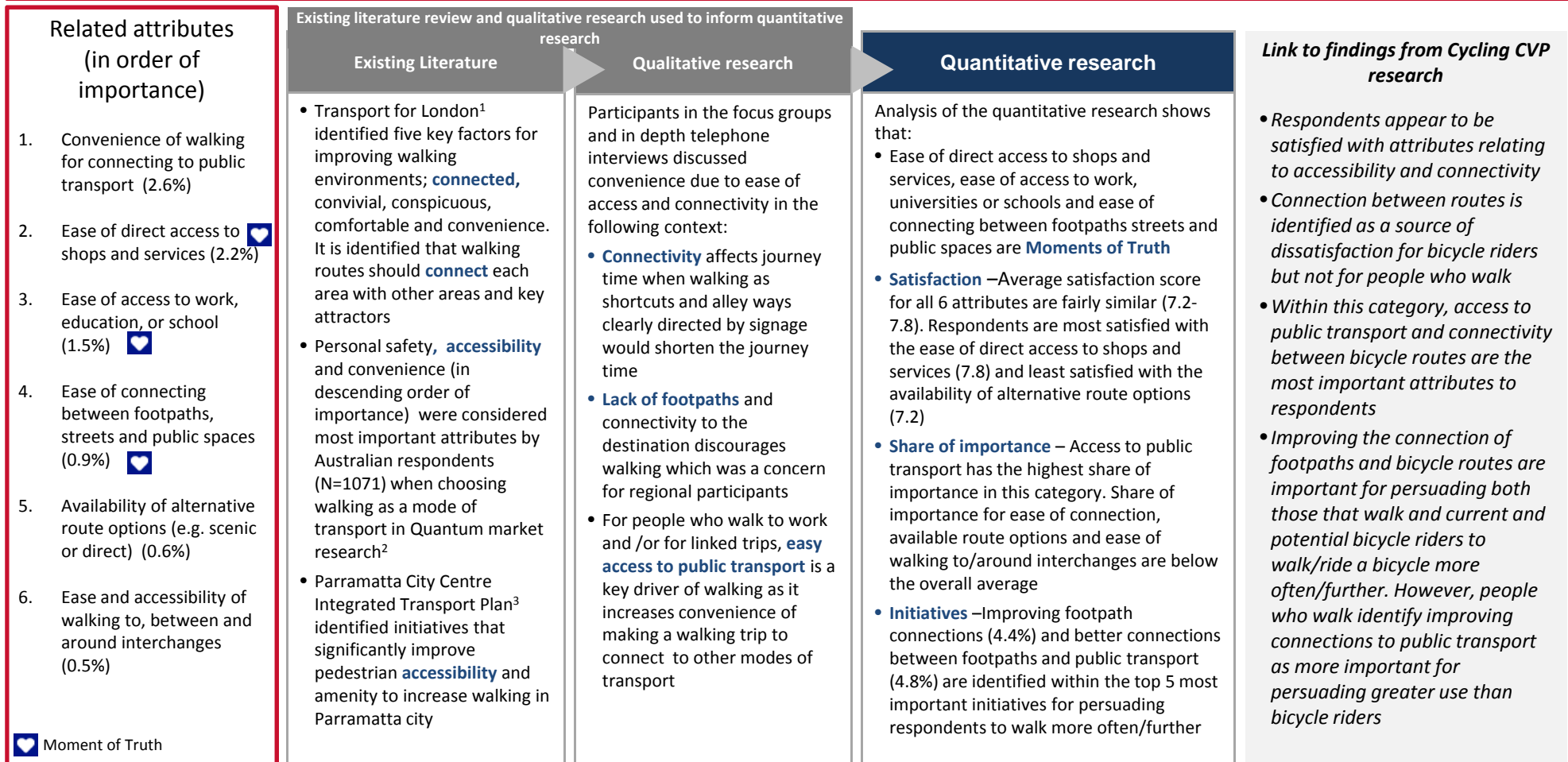
<sup>1</sup>Travel in London Report 2, Transport for London 2010  
<sup>4</sup>AECOM, NSW Walking Strategy, Literature Review, 2011

<sup>2</sup>BTS, Household Travel Survey, 2010

<sup>3</sup>Walking for travel and recreation in NSW, GTA Consultants, 2011

**INSIGHT:** Customers appear to be satisfied with attributes relating to access and connectivity and improved connectivity of footpaths is important for persuading them to walk more/further

**Convenience due to ease of access and connectivity**

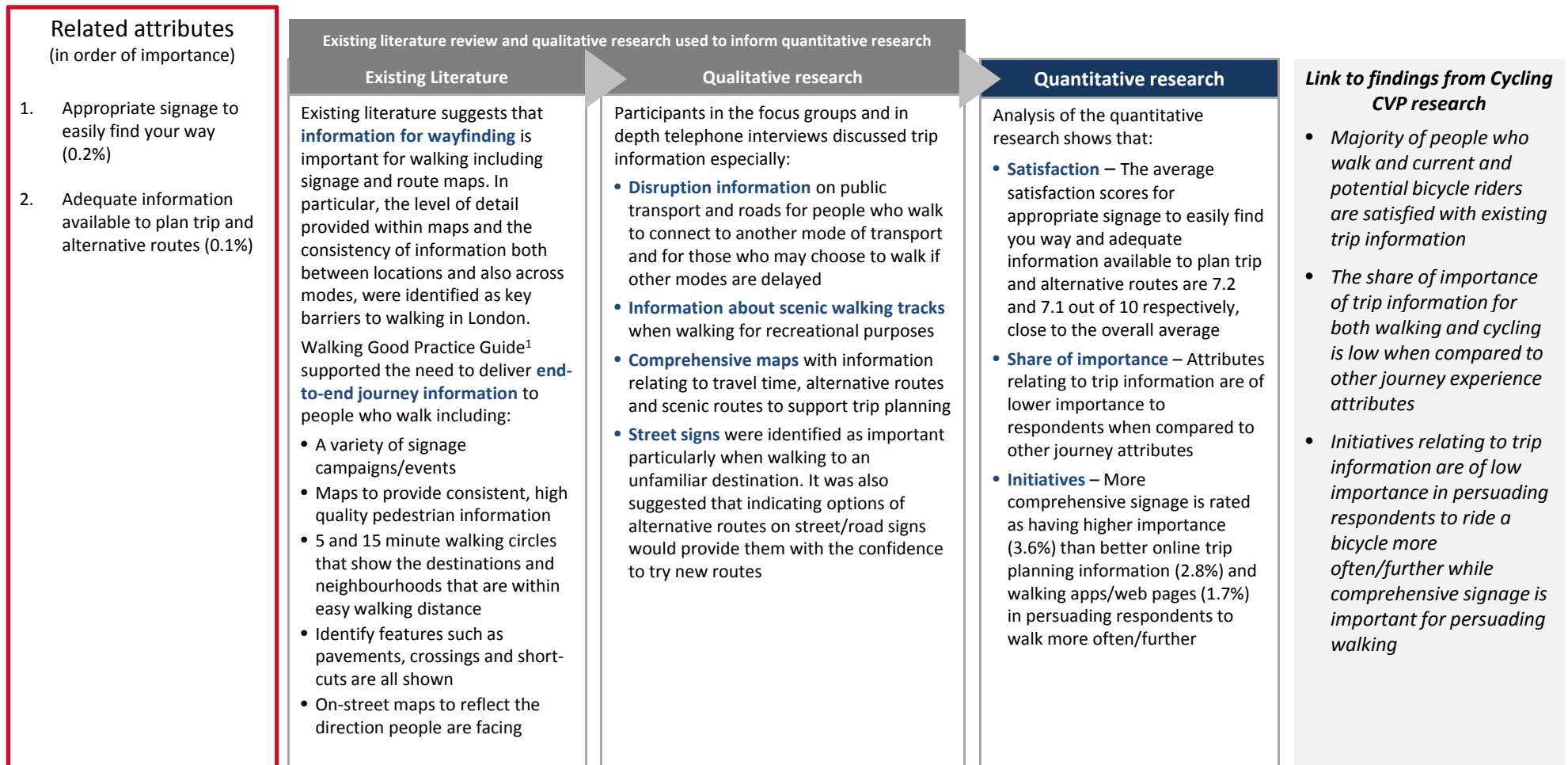


<sup>1</sup>Transport for London, *Improving Walkability*, 2005; <sup>2</sup>Quantum Market Research, *Customer Scorecard Research Quantitative Findings*, 2012 <sup>3</sup>Centre Integrated Transport Plan, Parramatta City 2009



## INSIGHT: Customers are generally satisfied with current levels of trip information

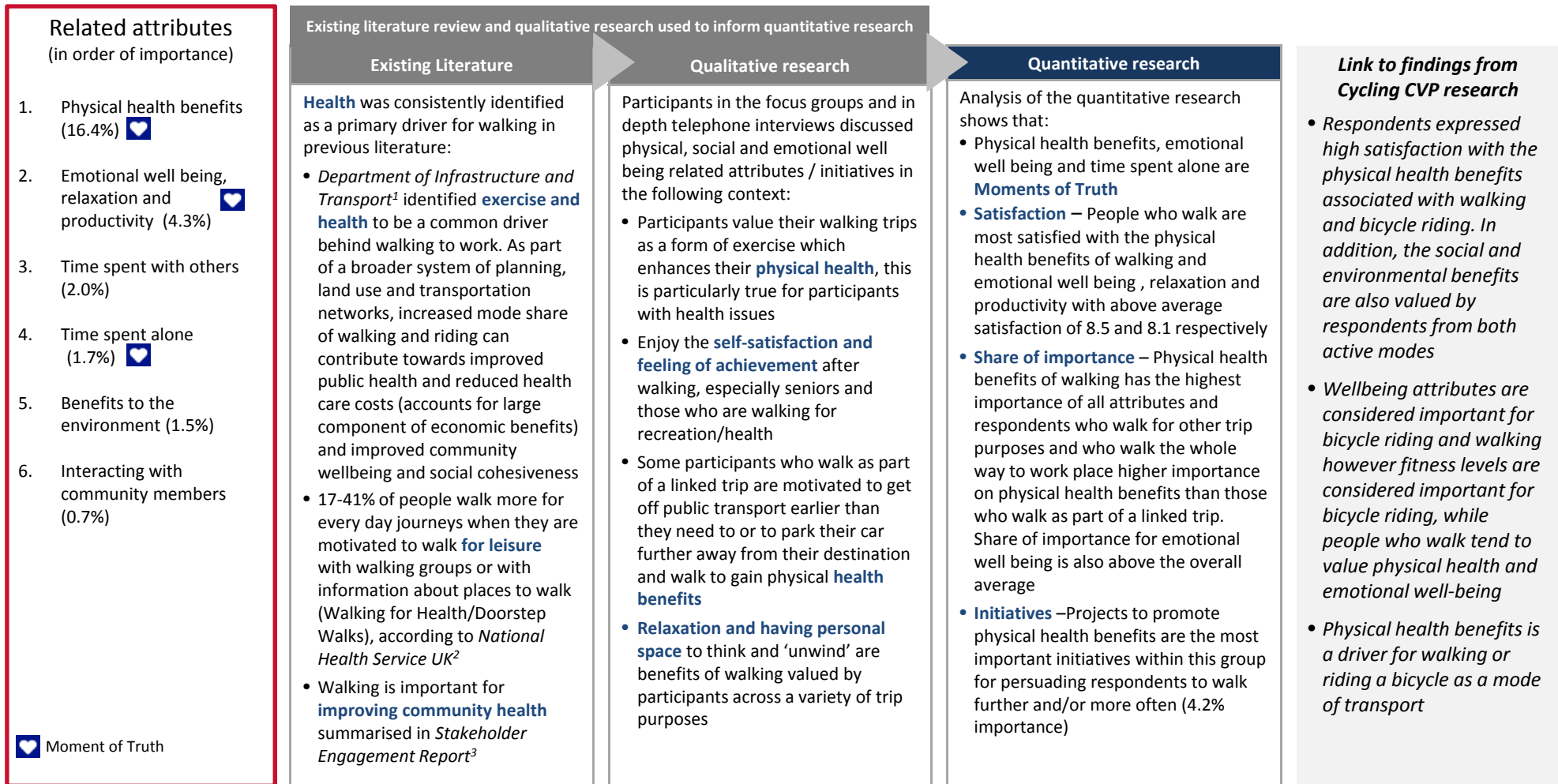
### Trip information



<sup>1</sup>Walking Good Practice, Transport for London, 2012

## INSIGHT: Primary research and existing literature consistently identify physical health and social/emotional wellbeing as important aspects of the walking experience

### Physical health and social/emotional wellbeing



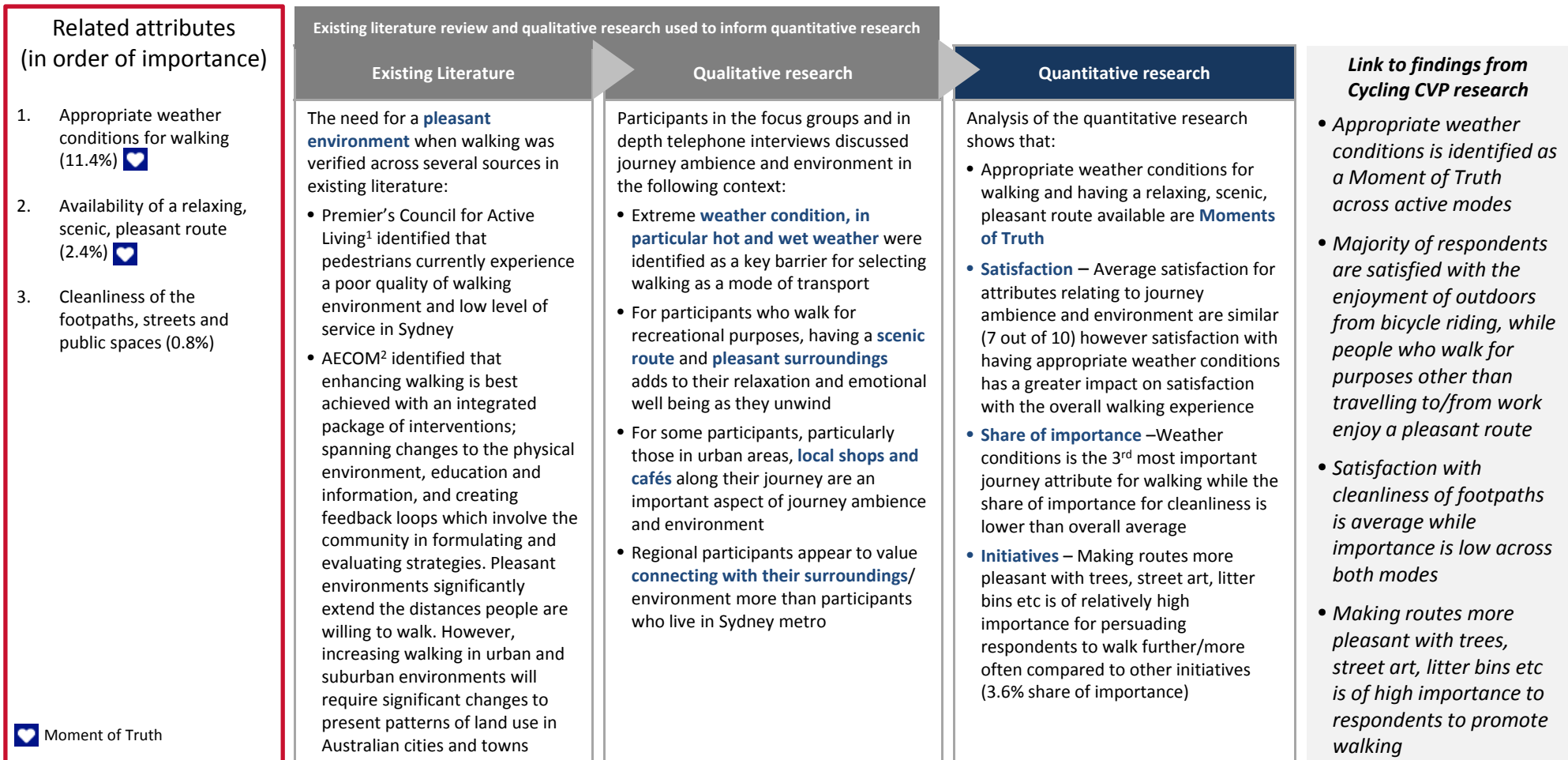
<sup>1</sup>Walking, Riding and Access to Public Transport, Department of Infrastructure and Transport, 2012

<sup>2</sup>UK National Health Service, Soft measures – hard facts, The value for money of transport measures which change travel behaviour', 2011

<sup>3</sup>Stakeholder Engagement Report, AECOM, 2011

## INSIGHT: Having a pleasant environment would persuade greater walking in the community however adverse weather conditions can be a key barrier

### Journey ambience and environment



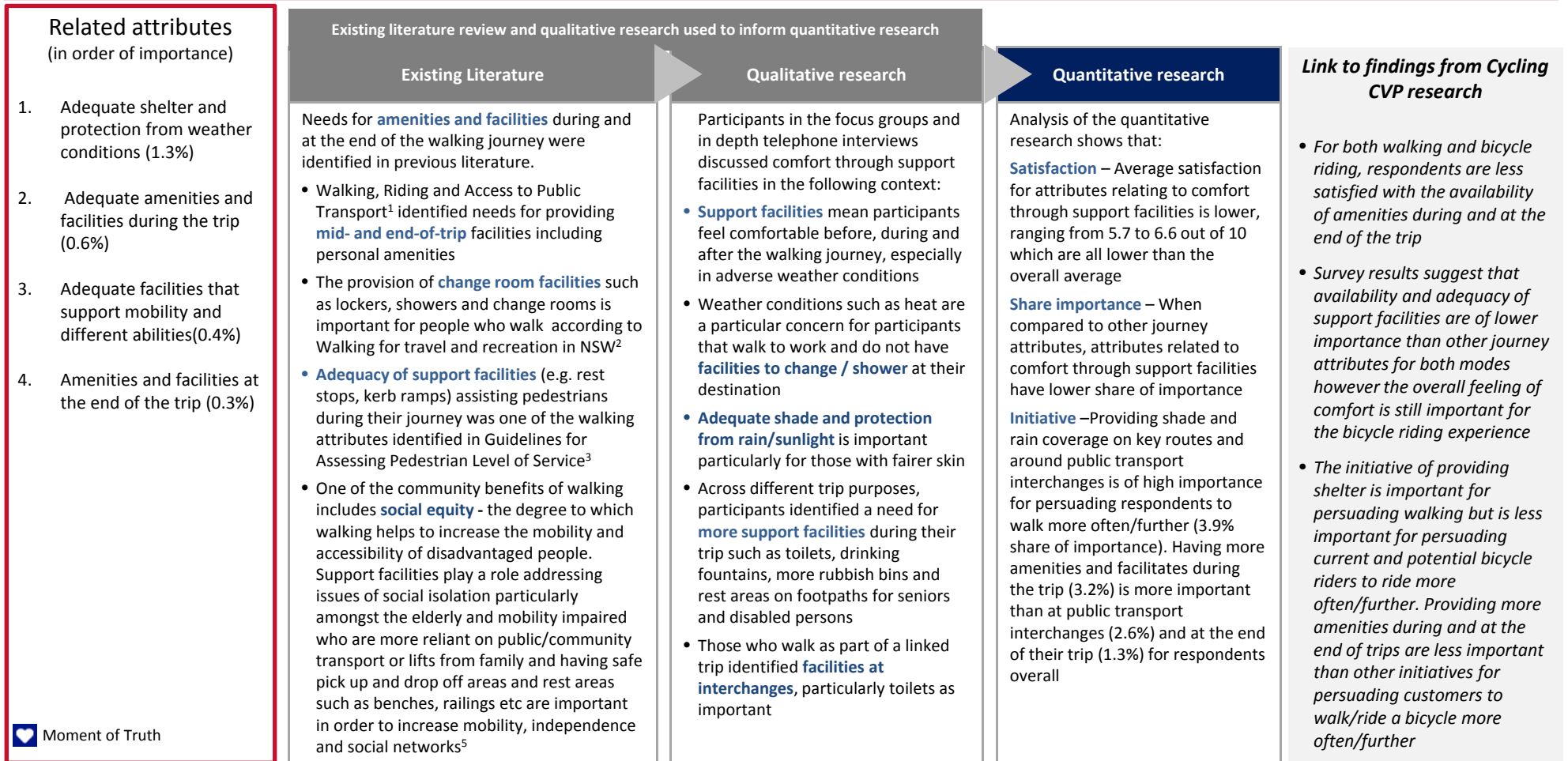
<sup>1</sup> Premier’s Council for Active Living, Walking for travel and recreation in NSW, 2011

<sup>2</sup> AECOM, NSW Walking Strategy, Literature Review, 2011



## INSIGHT: Customers value having amenities and facilities during the walking journey and are currently less satisfied with these elements of their walking experience

### Comfort through support facilities



 Moment of Truth

<sup>1</sup>Walking, Riding and Access to Public Transport, Department of Infrastructure and Transport, 2012

<sup>3</sup>Guidelines for Assessing Pedestrian Level of Service, Main Roads Western Australia, 2006  
Source: Transport for NSW, Walking CVP Research, June 2013

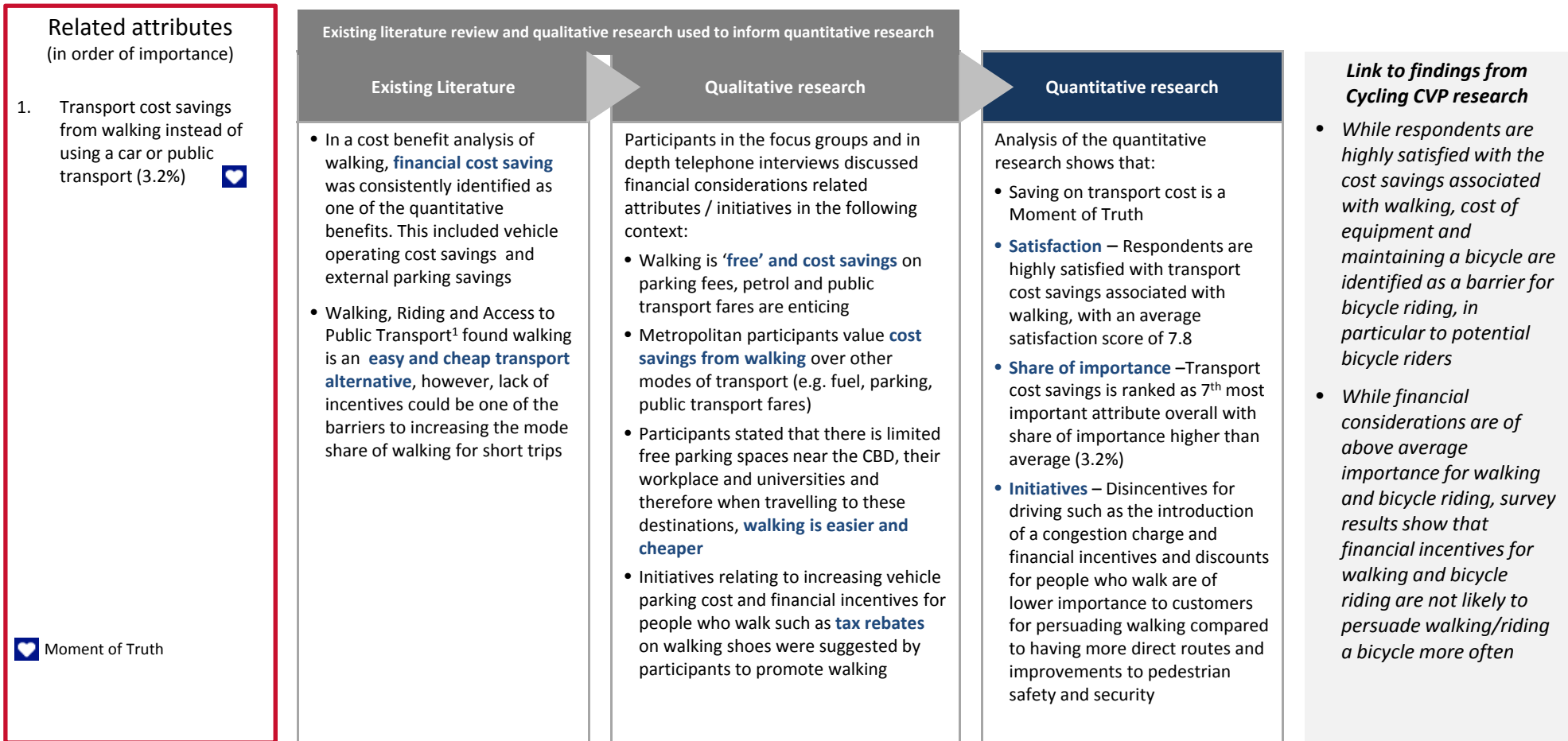
<sup>2</sup>Walking for travel and recreation in NSW, GTA Consultants, 2011

<sup>4</sup> A walking strategy for NSW, Assessing the economic benefits of walking, 2011

<sup>5</sup> AECOM, NSW Walking Strategy, Literature Review, 2011

**INSIGHT:** Customers value the transport cost savings associated with walking however financial disincentives for driving are of lower importance for persuading walking

**Financial considerations**



<sup>1</sup>Walking, Riding and Access to Public Transport, Department of Infrastructure and Transport, 2012

## 10. Where do I go for further information?

Refer to Appendices (separate supporting document)

