



LGWM – overview of research findings

30 June 2016

Research purpose and objectives

Research purpose

- To survey Wellington residents to help provide a basis for the development of principles to guide the implementation of transport planning in the region.

Research objectives

- To engage with a wide variety of Wellington region residents.
- To provide robust quantitative insights as well as opportunities for less-structured qualitative feedback.
- To capture a broad range of insights relating to what residents value, what frustrates them, and their ideas for improvement.

Methodology and reporting

- This report draws together themes across the totality of surveys in order to provide a broad overview of public sentiment with regard to the range of issues being considered in the “Let’s Get Welly Moving” (LGWM) project.
- This overview report encompasses results from several different sources:
 - a) 2x UMR focus groups – users of multiple transport modes
 - b) UMR demographically weighted phone survey (n=750)
 - c) GWRC online panel (n=631)
 - d) WCC online panel (n=643)
 - e) UMR street “intercept” survey (n=1000)
 - f) LGWM online survey (n=2503)
- This report doesn’t currently include feedback from the LGWM online “image” survey where respondents were invited to comment on a wide variety of image-based prompts. This was a popular forum with the public and included around 25,000 responses. These have undergone the first stage of automated text analysis but require further analysis from which ongoing insights on specific issues will be drawn.
- Methodology differed between all surveys and is detailed in individual reports for items (a) through (e). In some cases question wording differed slightly between surveys, and not all similar questions across surveys were compulsory. While employing a variety of methodologies was felt to be in keeping with the broader “engagement” goals of the project, it does mean that care needs to be taken when making direct numerical comparisons – and in some cases this simply isn’t possible. Accordingly, caution is advised in interpreting results as statistically representative in any surveys except (b) and (c). That said, there were often strong thematic qualitative similarities across the surveys.
- A separate report does not yet exist for survey (f) – full results are instead included in this overview report. This survey was administered by WCC and conducted via the N2A project website. As with the image survey, it was open to all members of the public and respondents self-selected.
- Results from another survey, the LGWM online “image” survey are not referenced in this overview report. That survey received around 25,000 qualitative responses and data processing is ongoing. While there were overlaps with the other surveys in terms of content, the questions themselves aren’t as straightforwardly comparable. These responses will instead be interrogated for specific insights on an ongoing basis.
- In some surveys, automated text analysis was used to process the large volume of open-ended responses and though this process differs methodologically from human-coding, strong themes were nevertheless apparent.

How to read the “qualitative” illustrations

Across all of the surveys a huge amount of qualitative material was generated. This typically came from the open-ended questions in the online surveys, for example: “What are your favourite things about Wellington?” While some of this material was hand-coded (UMR phone survey and GWRC panel), much was processed with specialist analysis software. The outputs are detailed below.

Overall method of analysis

- Computer-assisted analysis employed SPSS/IBM Text Analysis For Surveys software, which enables waves of data to be coded semi-automatically.
- Analysis enables both an indication of “number of mentions” of each topic, and also gives visibility to potential relationships between topics and themes.
- It typically produces a larger number of “code frames” or “themes” than human-coding. This is both a strength and a weakness. While it introduces an element of objectivity, preserves nuanced conceptual distinctions, and can highlight ideas that human coders may have overlooked, further analysis is often required to group concepts. This is a qualitative process, outlined below.

Frequencies (bar charts)

- The bar graphs identify all the mentions of each word or phrase and show the percentage of respondent answers in which they appear. The software codes all words and phrases to ensure that complex meaning or detailed sentiment isn’t lost. This explains the (often high) frequencies of terms like “City”, “CBD” or “issues, problems, difficulties”. The nature of the relationships of these terms to others is best visualised by the “net maps” as below.

Net maps (or “spider diagrams”)

- The “net map” connects key words and phrases visually based on associations in respondents’ answers. The size of the nodes represents the relative frequency of the term. Broad thematic territories have been overlaid as coloured shapes. Though supported to some degree by factor analysis (see below) these illustrations should be interpreted qualitatively and are intended as an aid to understanding rather than a definitive objective interpretation. The boundaries of the regions are not absolute and the nature of the software output means that it’s often impossible to capture all nuances on a single diagram.

Factor analysis (not pictured)

- A process known as “factor analysis” sits behind the thematic overviews pictured on the net maps. Factor analysis is a statistical method that calculates the strength of association between different words and phrases and groups them based on that. By indicating how ideas “clump together” within respondent answers, it can aid in the identification of themes, and can help to identify associations between concepts which may not be readily apparent from human-coded outputs.

Executive summary – “Top 10s”

Across all surveys, both those that were statistically robust as well as those where participants self-selected, there was a high degree of thematic consistency. While it's impossible to quantify the factors below precisely from survey to survey because of the generally qualitative sense in which they were expressed, they all feature strongly.

In terms of the top ten things that people like most about Wellington, the compactness and ease of getting around were regular frontrunners across the surveys these were frequently followed by comments relating to the natural environment. The harbour and waterfront were often singled out for mention.

A cluster of issues closely associated with the vibrancy of the capital – economically, culturally and socially – tended to round out the lists.

Top ten things people like about Wellington

- A compact city that's easy to get around
- The natural environment and its accessibility
- The harbour and waterfront
- Cafes, restaurants, and bars
- The vibrant and diverse culture
- Tourist attractions
- Public events
- Public facilities
- The sense of community
- The feel and heritage of the city

Similarly, there was significant agreement from respondents within each survey about the biggest frustrations they face in Wellington.

Traffic and congestion issues appeared consistently at the top of people's lists of concerns. These were frequently accompanied by comments relating to the ways in which they think public transport – in particular – should be improved to help deal with the problem.

Safety issues for both cyclists and pedestrians featured prominently too, with some mention of parking difficulties for motorists and road conditions rounding out transport themes.

High costs of living and the rising price of housing in Wellington also tended to be a fairly significant concern for many, supporting initial focus group findings.

Top ten frustrations about Wellington

- Traffic and congestion
- Public transport issues
- Cost of living and housing
- Parking difficulties
- Weather
- Cycle and pedestrian dangers
- Cyclist/motorist interaction
- Social issues and begging
- Road condition and maintenance
- Council decisions/priorities

Executive summary – key messages

- **The compactness and the ease of getting around are important elements of what's great about Wellington**

As will be evident from the Top 10 list on the previous page, “compactness” and “ease of getting around” were very strong themes across all of the surveys when it comes to what respondents like most about Wellington. The high accessibility of all of the things that Wellington has to offer commercially, socially, and culturally appears to be a strong element in people’s overall enjoyment of the city. Preserving this “feel” and maintaining and improving ease of access looks to be a major driver in the demand for improved transport options.

- **People are highly supportive of public transport improvements**

Strong public transport themes were evident across all surveys – particularly calls for its improvement. The frequency of public transport services, perceptions of high cost, and journey time predictability were especially prevalent themes. While many respondents appear to think that Wellington has a fairly good public transport system already (and particularly compared to other New Zealand centres) a large number believe there is significant room for improvement, and see investment as an important element in helping address their frustration with traffic.

- **Respondents generally express a lower priority for roads and cars**

Congestion and traffic were amongst the biggest frustrations respondents expressed. Though when queried in one survey about how bad this problem was compared to Auckland or to what extent congestion would be expected in a similarly vibrant city, respondents tended to be more charitable towards Wellington. Nevertheless their frustration with traffic and congestion was highly consistent across all surveys, with many expressing a preference for a central city less dominated by cars. A high percentage of respondents also preferred investment in public transport over initiatives to make self-driving easier, including the building of new roads.

- **They'd like a city that's more pedestrian-friendly**

Walking is a popular way to get around Wellington and the opportunity to do so is valued by respondents across the surveys. Linked to the lower priority given to "more cars" above appears to be the view that private motor vehicles are largely responsible for much of the noise and pollution that decreases the enjoyment of walking.

- **The environment is an important concern and people's connection to it is valued highly**

The natural environment, particularly the waterfront and harbour, were prominent in the lists of things that people liked and valued about Wellington. The value is both intrinsic and extrinsic: people talked of their “connection” to the environment and also the things they enjoy doing in it: running, walking, cycling, tramping, sailing and so on. The built environment, including the heritage value of parts of Wellington featured as well, though considerably further down most lists.



Qualitative overview

**“The things I like
most about
Wellington City...”**

Favourite things - summary

- In both the UMR telephone survey, and GWRC panel the compactness and ease of getting around came through most strongly as themes when respondents were asked about their favourite things about Wellington City. These surveys were hand-coded but there is broad consistency with the themes evident from the automatic coding of the other surveys.
- In the WCC panel and LGWM online survey “ease of getting around” also featured heavily.
 - The WCC panel net map of “favourite things” presents a cluster of issues around accessibility, including both walkability, and compactness. Both of these feature prominently in the frequency graph. "Easy to get around" also scores highly on the WCC panel frequency chart.
 - In the LGWM online survey frequency graph "compactness" was the most frequently mentioned phrase at 40%, while "walkability, access, easy to get around" came in second at 31%.
- Other themes evident across all the surveys were the City culture, vibrancy, restaurants and cafes, entertainment options, and the natural environment.
 - The harbour and waterfront; and cafes, restaurants, and entertainment options were the second and third most prominent themes in the UMR telephone survey.
 - The waterfront and harbour was the second most prominent phrase in the WCC panel survey, mentioned in 24% of responses.
 - The "natural environment, landscape, green spaces" (12%), "waterfront and harbour" (12%), and "vibrant city" (10%) were the fifth, sixth and seventh most prominent terms in the LGWM online survey.
 - The "waterfront and harbour" (17%) and "natural environment, landscape, green spaces" (15%) were the fifth and sixth most prominent phrases on the GWRC panel.

Favourite things about Wellington City (hand-coded)

} What do you like most about living in, working in, or visiting Wellington City?

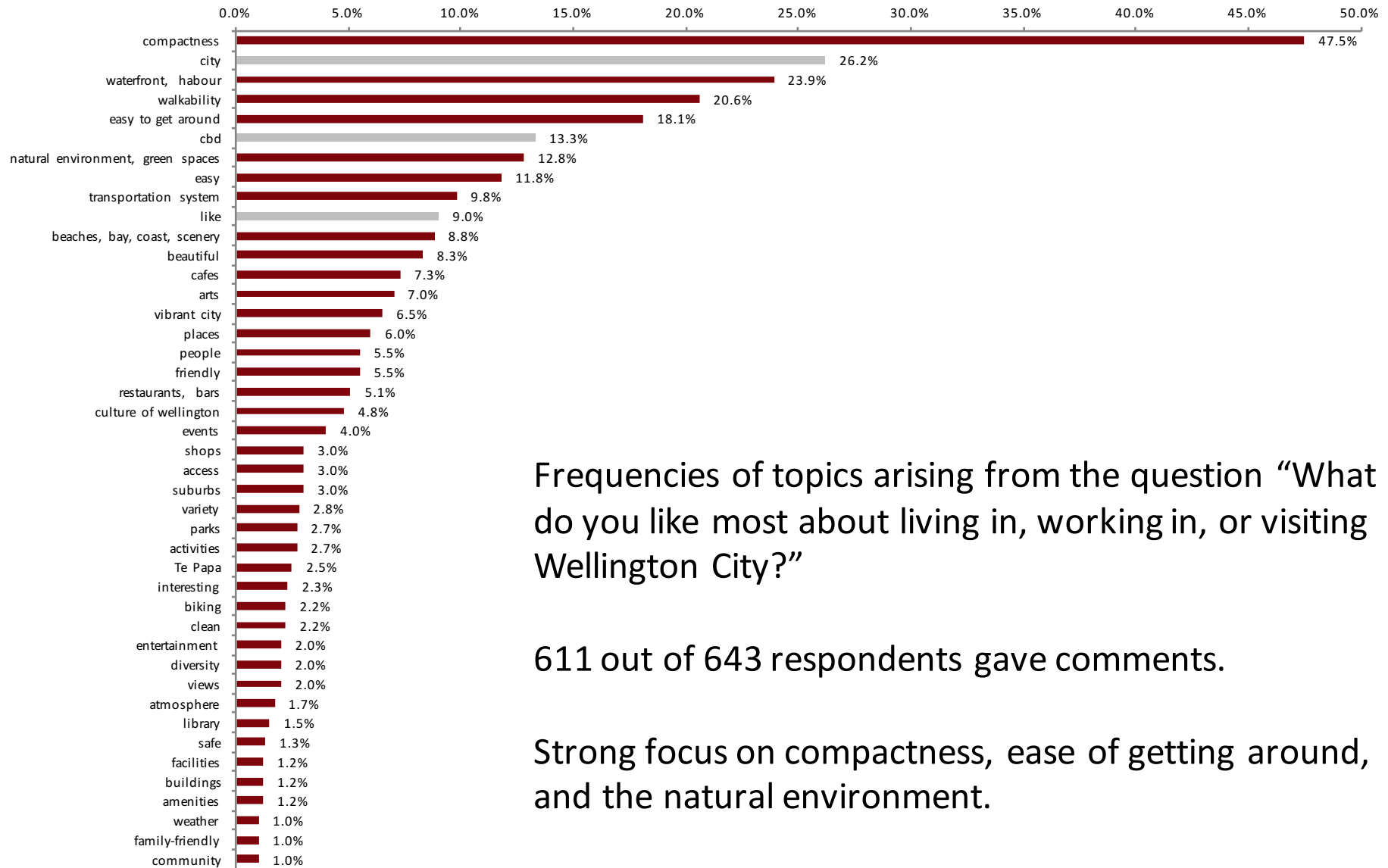
UMR phone survey



GWRC panel



WCC panel – favourite things – frequencies

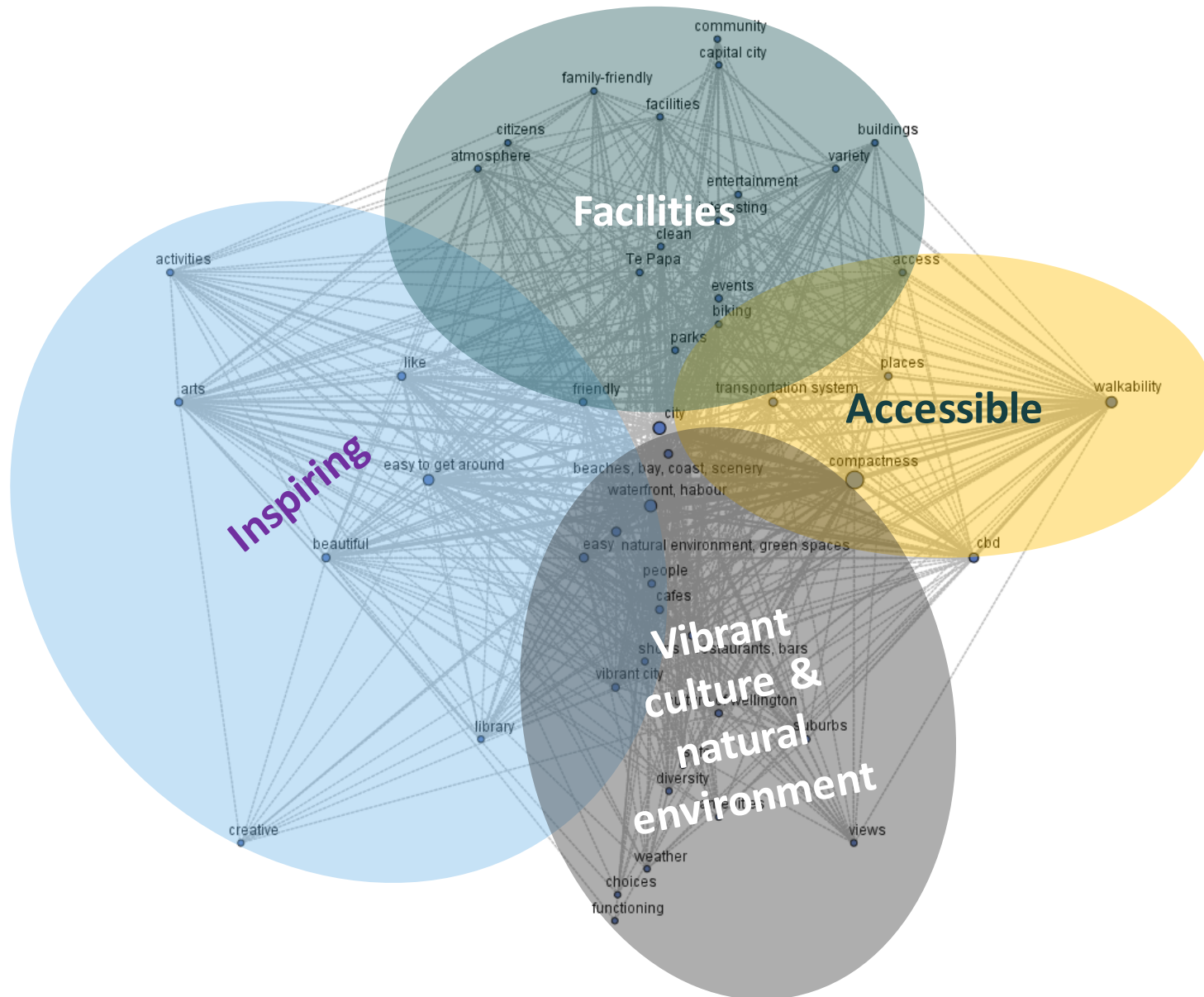


Frequencies of topics arising from the question “What do you like most about living in, working in, or visiting Wellington City?”

611 out of 643 respondents gave comments.

Strong focus on compactness, ease of getting around, and the natural environment.

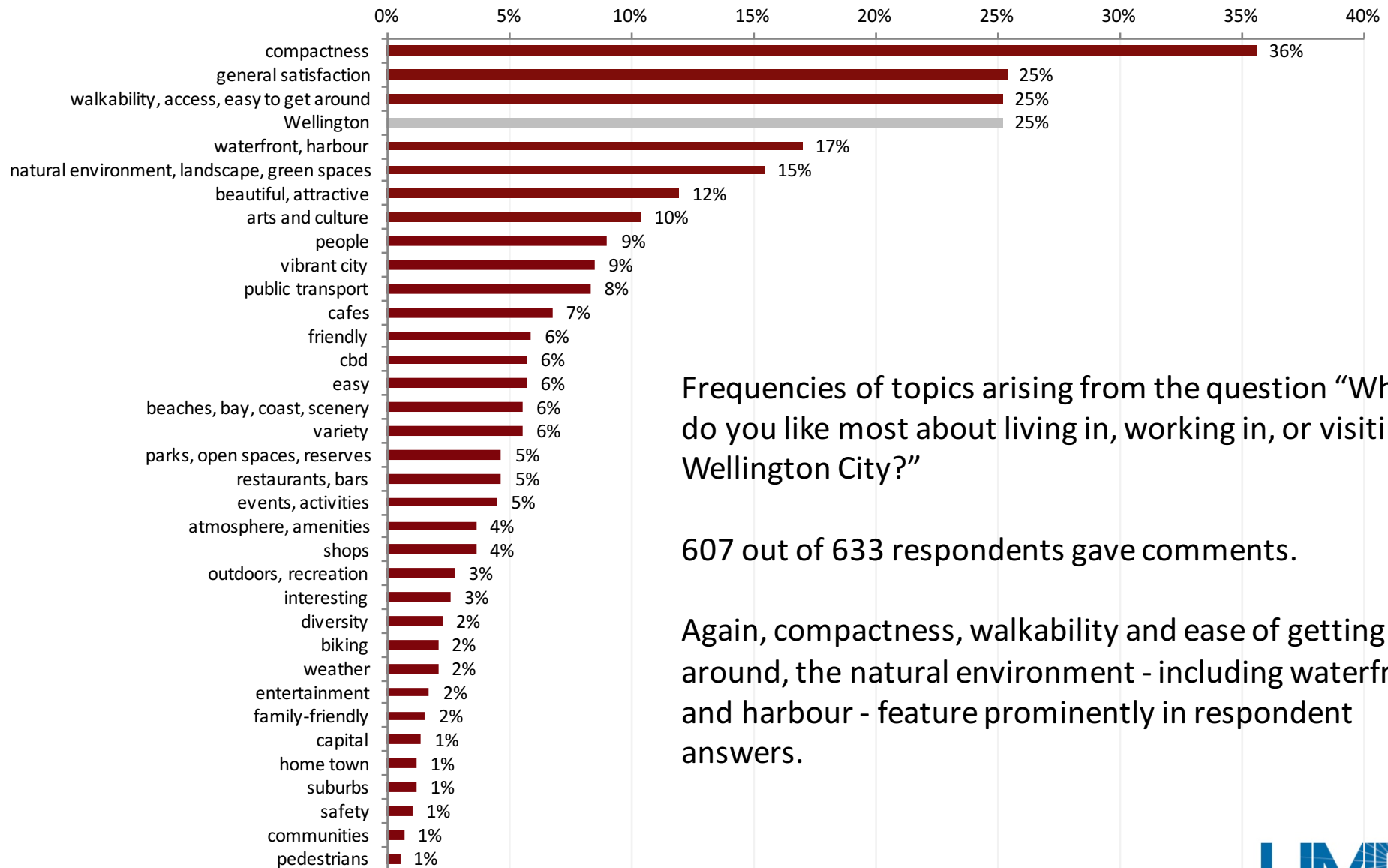
WCC panel – favourite things – themes



WCC panel – favourite things – selected quotes

- *“It’s good to walk around the city – it’s not too hilly in the centre, it feels fairly safe and the walk along the waterfront is interesting and refreshing.”*
- *“Small, for a capital city, and not crowded. I really love the waterfront and value the fact that is accessible to everyone.”*
- *“Being able to walk anywhere throughout the city, especially around the beautiful waterfront.”*
- *“Its size - small enough to get around easily; big enough for lots of variety and places to visit. Working in the central city is easy with good transport links, access to the waterfront, and good food and shopping options. It's great to be able to walk to meetings, at least when the weather is good!”*
- *“Its size, particularly how easy it is to walk around quickly. Also like the waterfront area, and how that makes an attractive walking alternative to the CBD.”*
- *“Vibrant city, easy access by public transport, plenty of good coffee shops and cafes, lovely waterfront.”*
- *“Its compactness and how quickly you can get around the CBD on foot and enjoy public spaces like the waterfront.”*
- *“Beautiful environment, beaches, hills and bush a stone's throw from a vibrant city centre.”*
- *“Love living in Wellington as it is a vibrant city with friendly people. Good cafes and other places to eat and catch up with friends. Lots of free activities on the weekend.”*
- *“I like the people and culture of Wellington. I think that it’s a vibrant and friendly city. I also like that you don't need a car and can walk and use public transport to get around.”*

GWRC panel – favourite things – frequencies

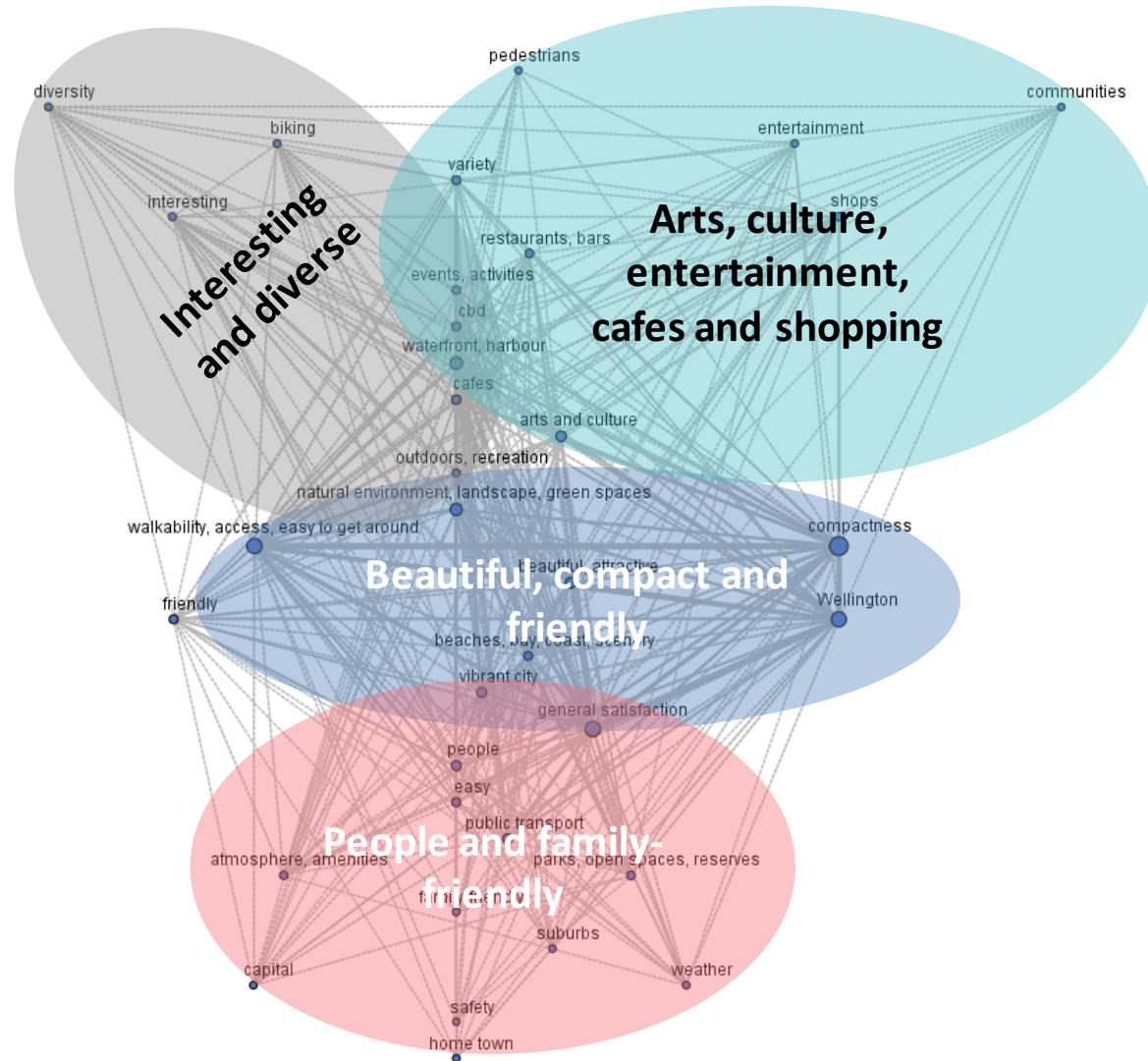


Frequencies of topics arising from the question “What do you like most about living in, working in, or visiting Wellington City?”

607 out of 633 respondents gave comments.

Again, compactness, walkability and ease of getting around, the natural environment - including waterfront and harbour - feature prominently in respondent answers.

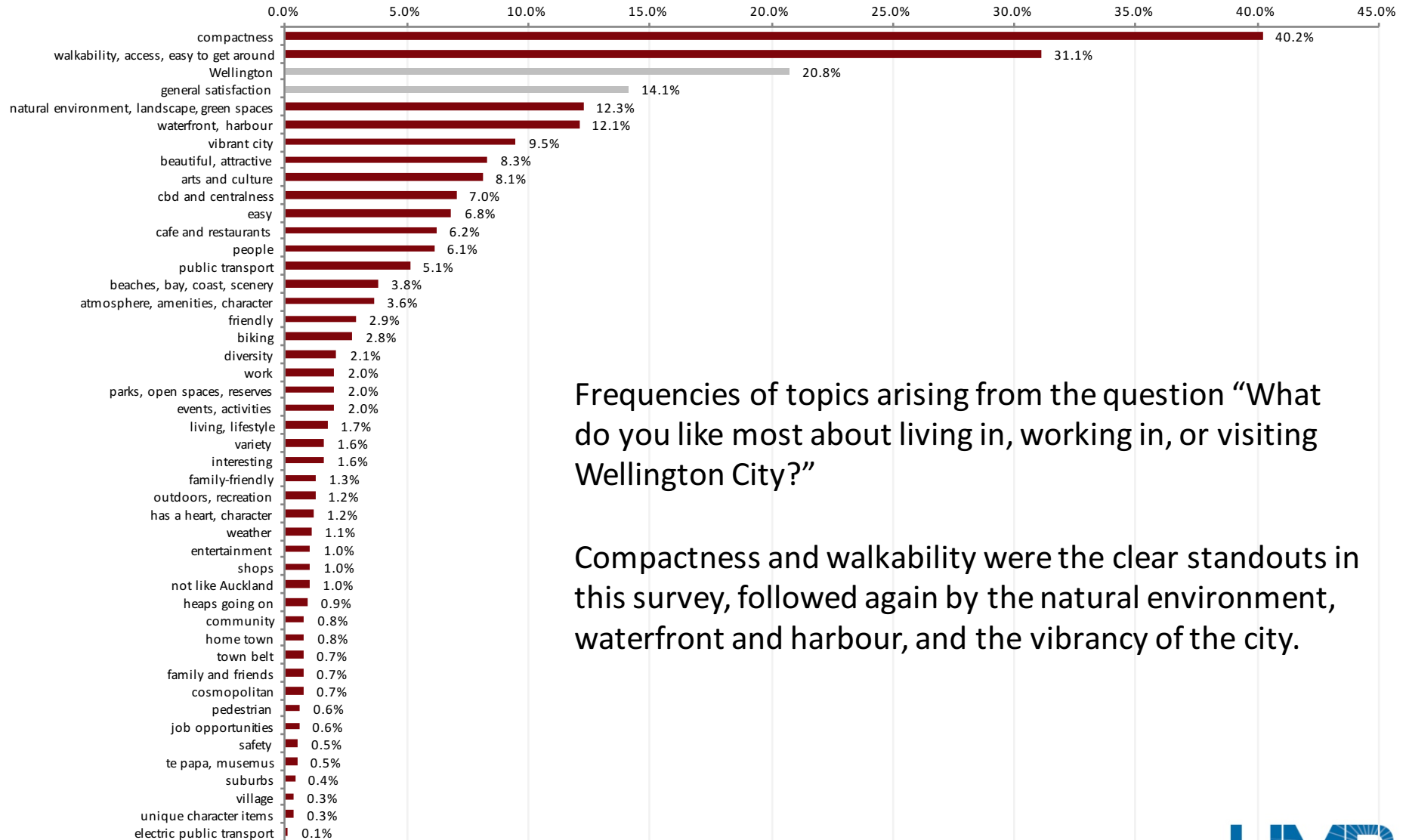
GWRC panel – favourite things – themes



GWRC panel – favourite things – selected quotes

- *“It is a small compact city where most things are within walking distance of each other and the public transport is fabulous.”*
- *“The range of cultural and commercial opportunities in a compact space.”*
- *“The compact nature and that you don't need to go far for anything. I love the number of events we host and the variety of them - it's not all directed at the young and caters for all ages.”*
- *“The atmosphere, the wide range of eateries, activities, the fact that it is a compact city, the scenery and harbour.”*
- *“The vibrancy and compactness of the city; the people; the cafes and bars; the entrepreneurs and businesses; the environment and lifestyle.”*
- *“Vibrant city centre, with huge choices for dining and entertainment nestled in a beautiful harbour.”*
- *“Friendly people in streets and shops; easy to get from one area to another; great opportunities for participating in arts events (really spoilt for choice), great food and great coffee.”*
- *“Being able to walk to work, theatre, dining out. Love Cuba Street and the waterfront. Great art and performance art community feel and activities.”*
- *“It's easy to navigate your way around the city. The waterfront is accessible to everyone and there is so much happening every weekend.”*
- *“The diversity of cultures and community feeling. The environment has a buzz about it and there is always something to do.”*

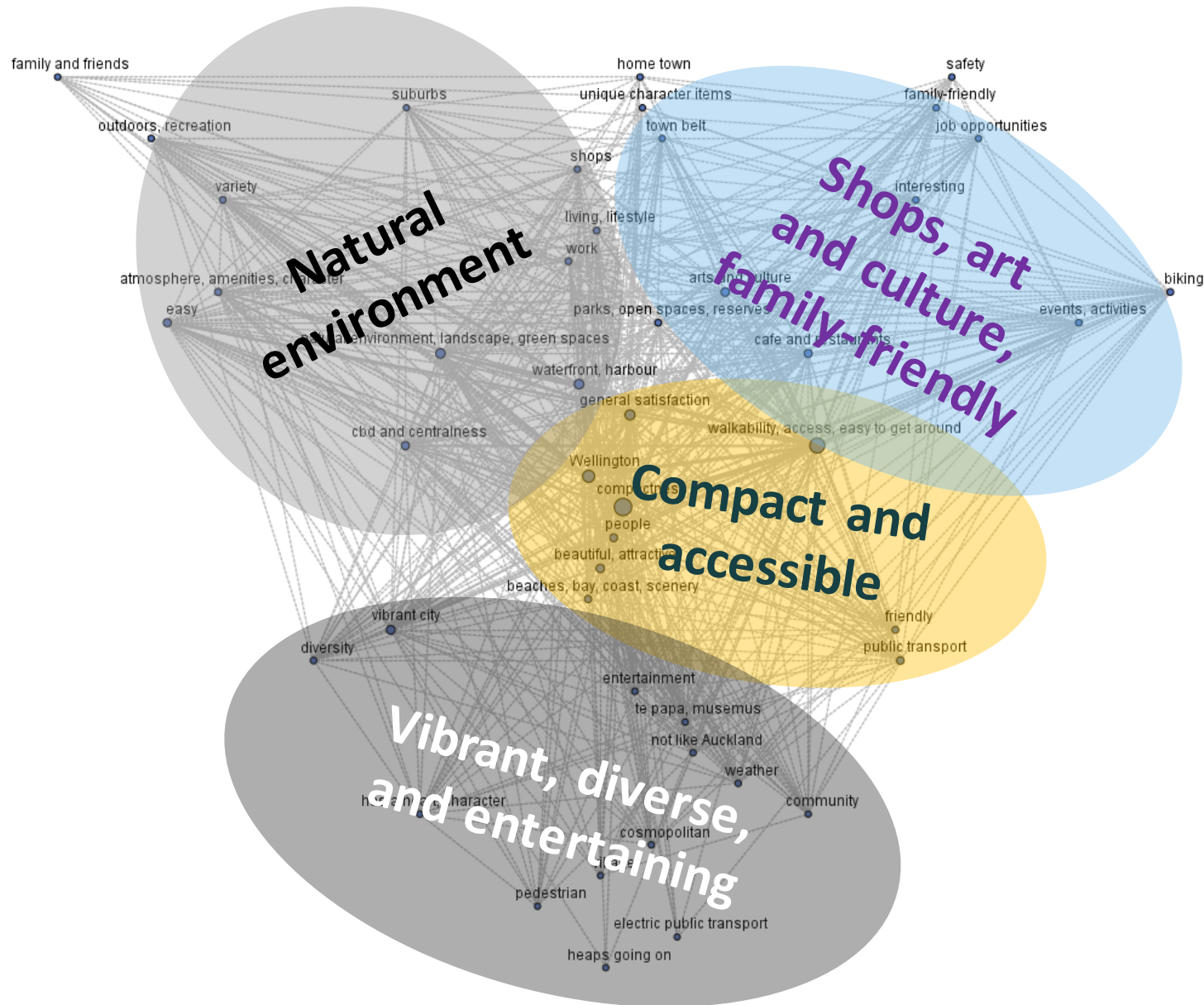
LGWM online survey – favourite things – frequencies



Frequencies of topics arising from the question “What do you like most about living in, working in, or visiting Wellington City?”

Compactness and walkability were the clear standouts in this survey, followed again by the natural environment, waterfront and harbour, and the vibrancy of the city.

LGWM online survey – favourite things – net map



LGWM online survey – favourite things – selected quotes

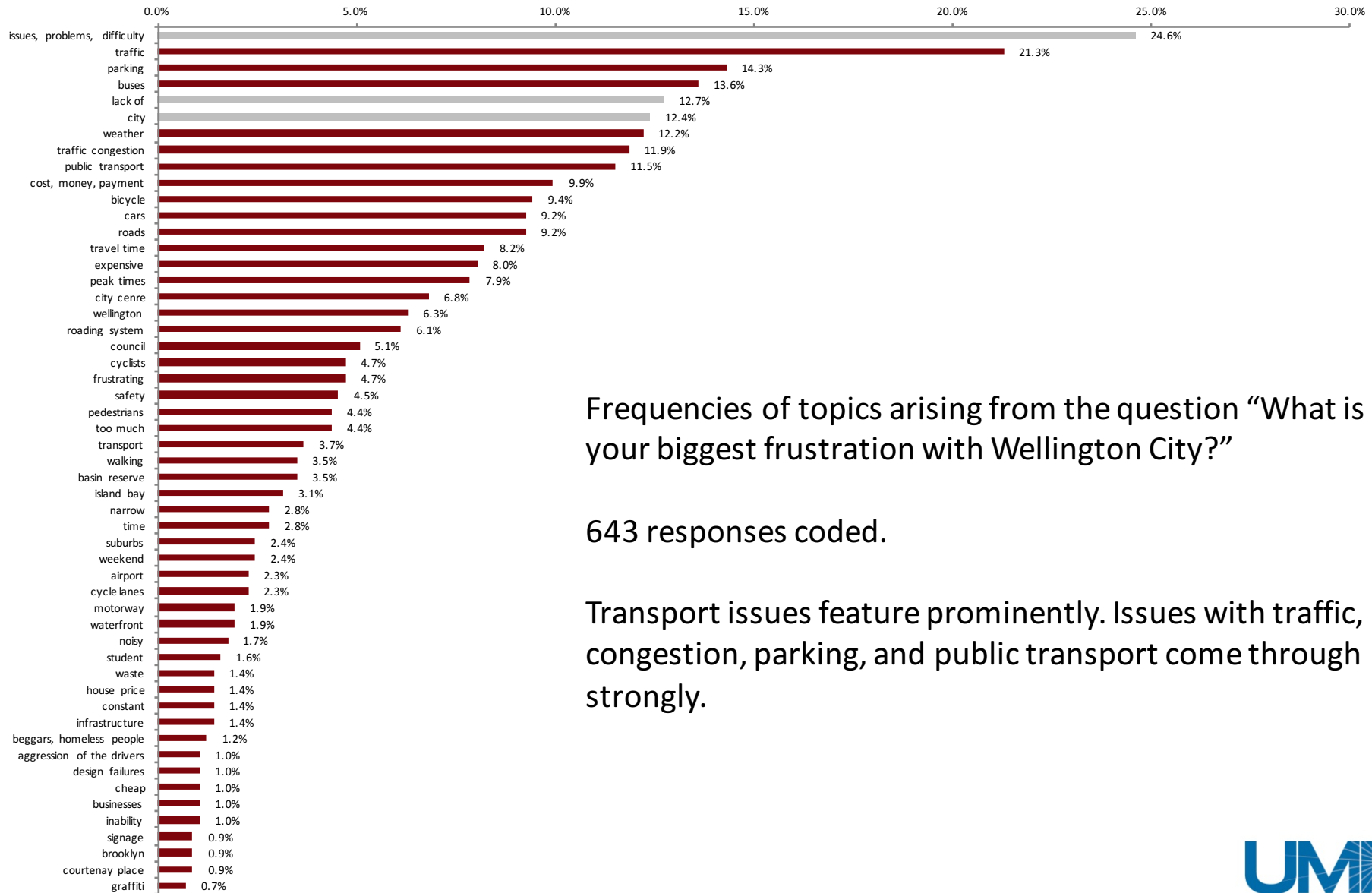
- *“The compactness in the CBD. You can get from one end of the town to the other in less than 20 minutes which is great. Good public transport system with park and ride facilities from greater Wellington to CBD.”*
- *“The compact nature of the city and the diversity of activities.”*
- *“We have a compact and diverse city, with a great mix of culture and Industry. All of this is set against a fairly rugged and at times challenging natural environment that helps shape the character and values of the population who live here.”*
- *“It is relatively easy to get around. I like its compactness and its edginess. You don't have to travel far to enjoy a great bush walk, enjoy a coastal experience, walk in nature or experience great culture.”*
- *“It is so compact and easy to get from A to B. People are friendly and helpful. It has a great vibe with lots of coffee shops, good choice of restaurants, arts and free events. The harbour is a beautiful setting on a sunny day. ”*
- *“Everything in the CBD is walking distance from everything else, especially via the waterfront. Beautiful.”*
- *“Being able to walk around the city, the beautiful town belt, views of the harbour, interesting shows and restaurants.”*
- *“The beautiful views along the waterfront.”*
- *“It's pretty small but has lots of fun activities both indoors and outdoors. Beautiful harbour. Great food. Lots of culture.”*
- *“The vibrant city surrounded by natural walkways and tracks.”*

**“My biggest
frustration with
Wellington City...”**

Biggest general frustrations – summary

- Traffic congestion and the public transport systems were the most prominent themes throughout the surveys when respondents were asked what their biggest frustration with Wellington City is.
- In the WCC panel survey a cluster of issues relating "transport systems" are dominant on the net map. Traffic (21%) and buses (14%) were the second and fourth most mentioned phrases in terms of frequency (first was "issues, problems, and difficulty", which is expected because of the auto-coding of the question).
- In the LGWM online survey "traffic congestion" (26%) and "public transport" (11%) were the first and fourth most mentioned phrases.
- In the hand-coded analysis of the GWRC panel responses the "public transport system" and "traffic congestion and delays" were strong themes, 26% mentioned the public transport system, while 25% mentioned traffic congestion and delays. The auto-coded responses showed similar themes.
- Parking availability and cost also arose fairly frequently across surveys.
 - Parking was the third most-mentioned phrase in the auto-coded results in both the WCC panel and GWRC panel (14% and 18% respectively) and was fourth in the hand-coded analysis arising from the GWRC panel on 18%
 - Parking was the seventh most-mentioned phrase in the LGWM online survey (10%)

WCC panel – biggest frustrations – frequencies

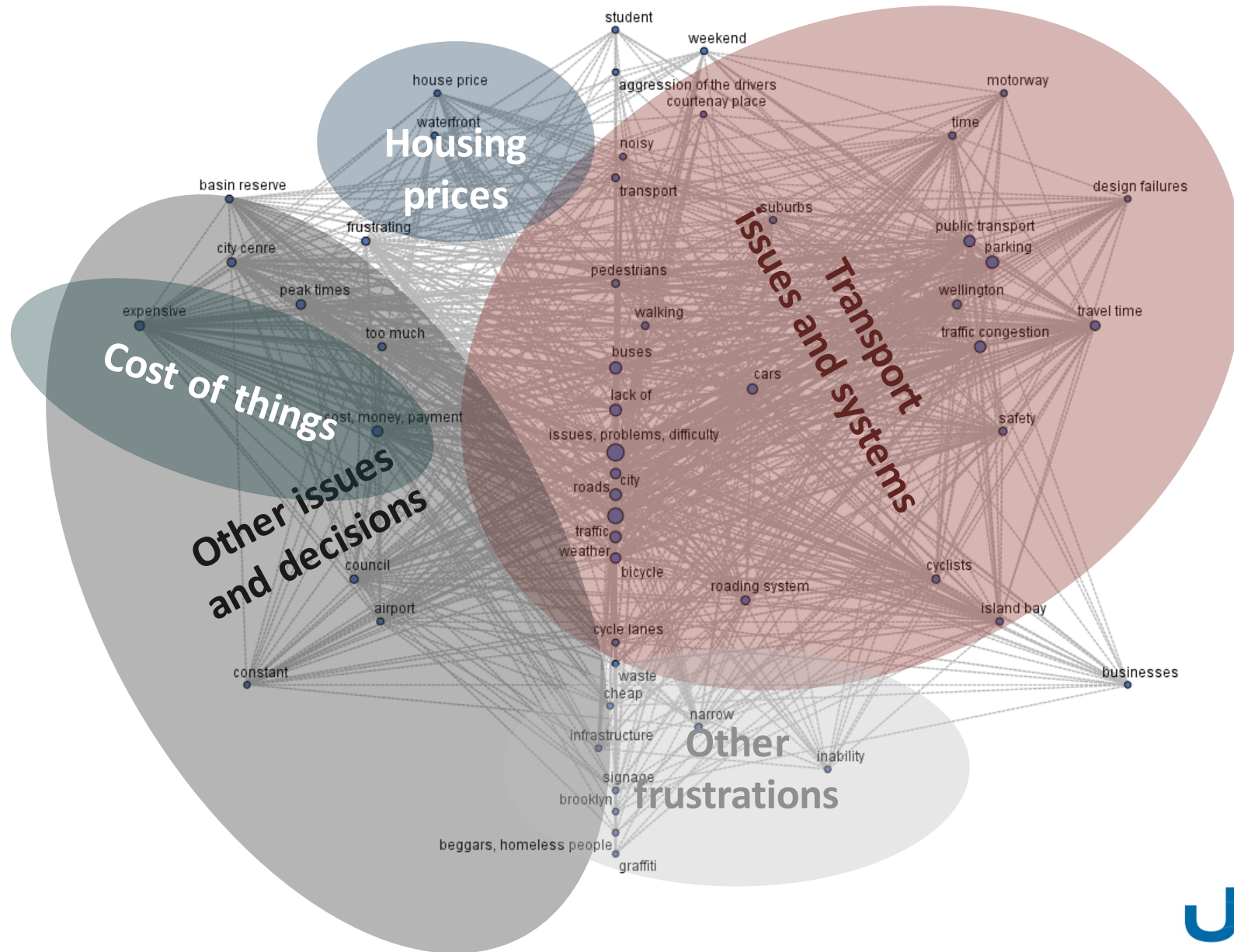


Frequencies of topics arising from the question “What is your biggest frustration with Wellington City?”

643 responses coded.

Transport issues feature prominently. Issues with traffic, congestion, parking, and public transport come through strongly.

WCC panel - biggest frustrations – net map



WCC panel – biggest frustrations – selected quotes

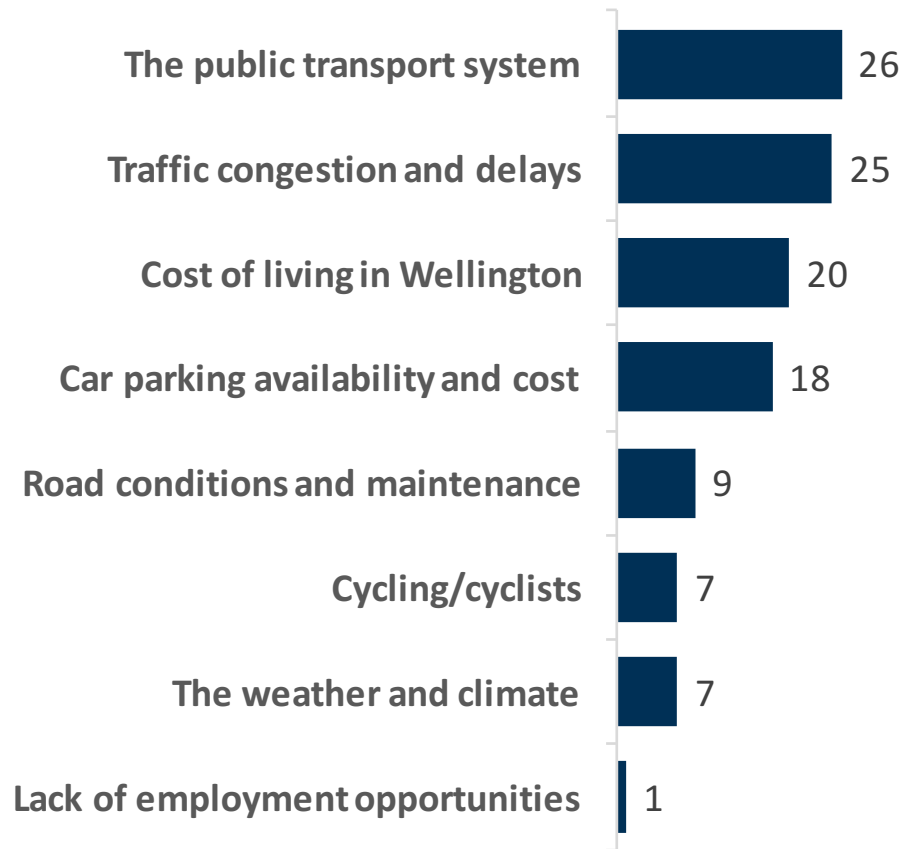
- *“Lack of safe cycle routes, too many cars allowed within the CBD resulting in conflict between cars and public transport, cyclists and pedestrians. Too many cars parked on streets, especially on arterial routes, making it dangerous for cyclists and pedestrians. CBD should be car free during normal business hours. Wider footpaths for pedestrians.”*
- *“As much as our bus service is well developed, we could do SO much better with developing public transport. And anything that can be done to encourage bicycles needs to be done.”*
- *“Traffic at peak hours - we need a congestion tax that directly subsidises public transport!”*
- *“The increasing cost of public transport.”*
- *“Getting across town. Driving in traffic is time consuming and frustrating. Public transport is expensive, particularly when traveling with children and changing routes.”*
- *“Poor quality rental housing, lack of parking and traffic congestion.”*
- *“Traffic - particularly during peak hours and during weekends. I use bus transport but on a route that doesn't have the advantage of bus lanes.”*
- *“Traffic at peak hours - we need a congestion tax that directly subsidises public transport!”*
- *“Lack of public transport and traffic.”*
- *“Peak hour traffic and some unreliable bus routes.”*
- *“The traffic is so much worse than it should be for a city of this population.”*
- *“Parking and too much traffic going through the central city. There are not enough street parking options and the cost is too high. Often the lights are out of synch, making progress horribly slow.”*

GWRC panel – frustrations – hand-coded

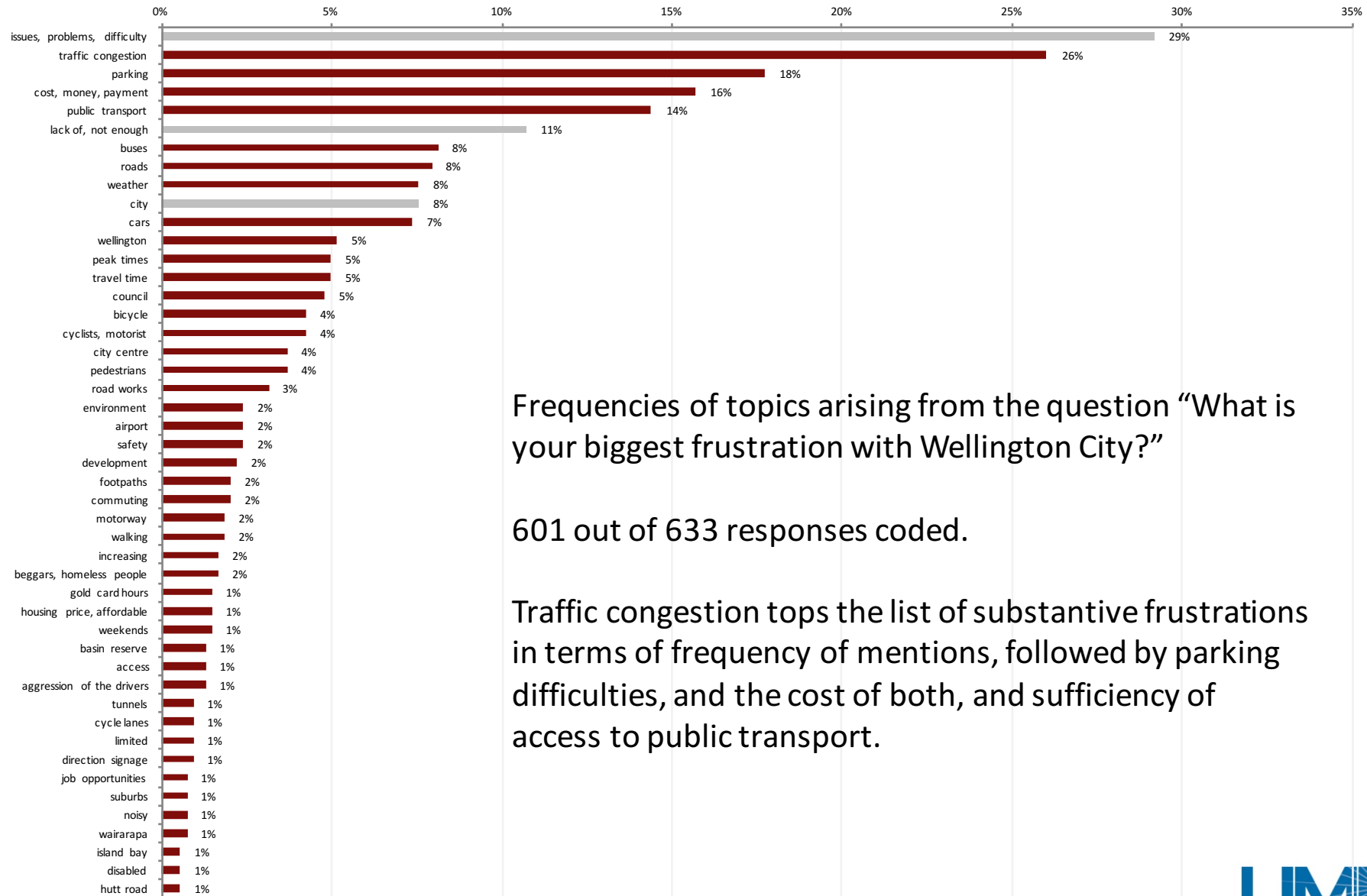


What is your biggest frustration about living in, working in, or visiting Wellington City?

GWRC panel



GWRC panel – frustrations – frequencies

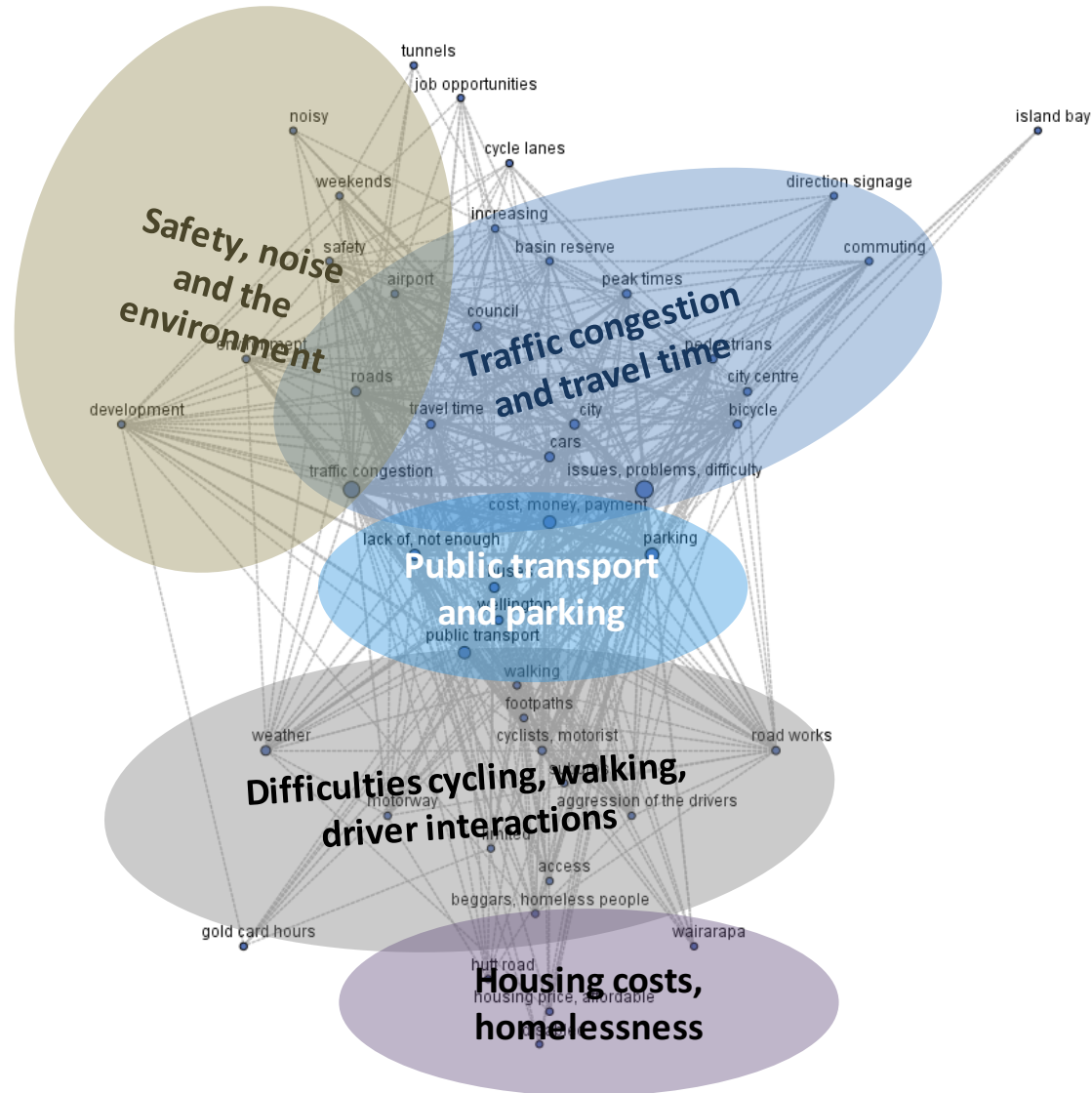


Frequencies of topics arising from the question “What is your biggest frustration with Wellington City?”

601 out of 633 responses coded.

Traffic congestion tops the list of substantive frustrations in terms of frequency of mentions, followed by parking difficulties, and the cost of both, and sufficiency of access to public transport.

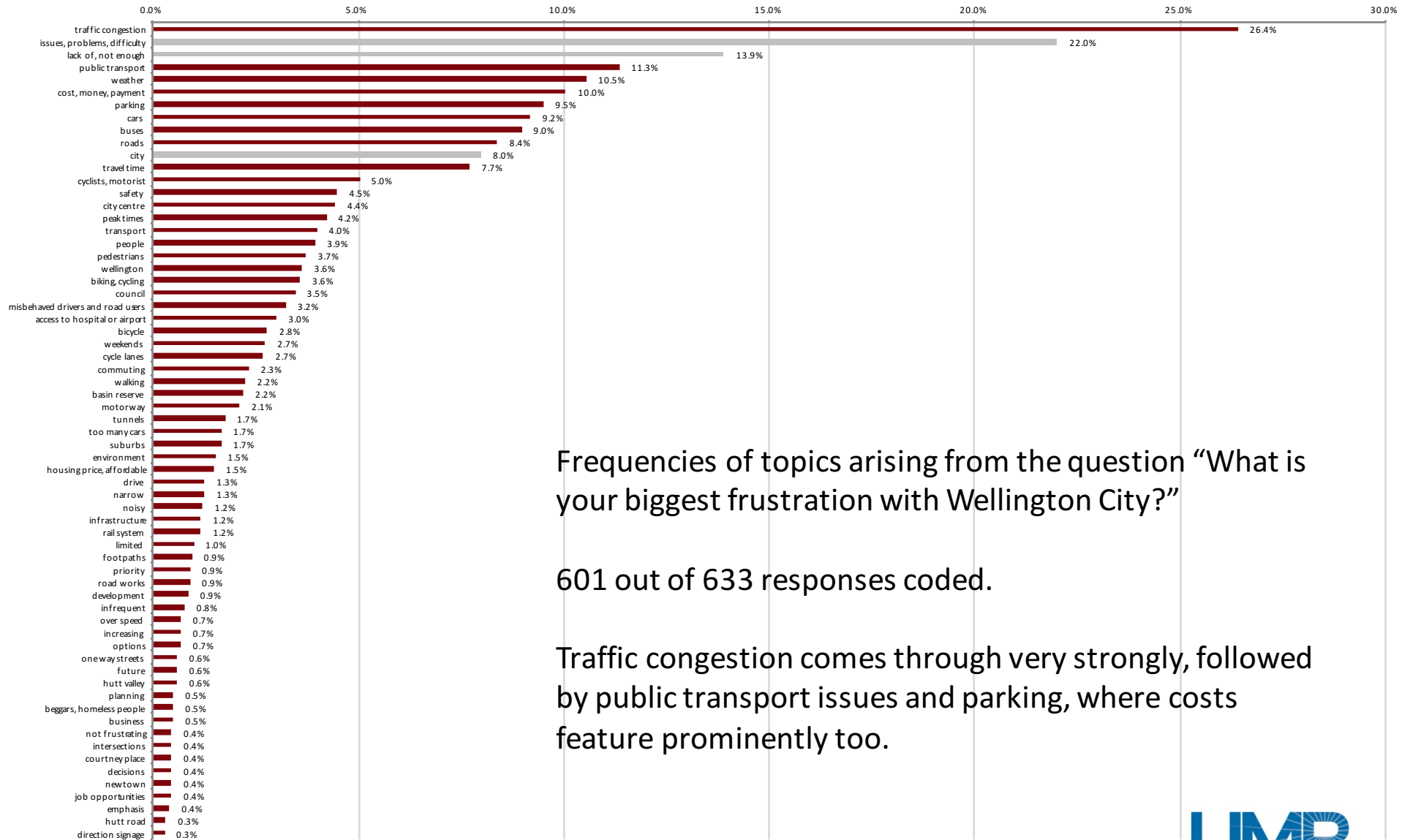
GWRC panel – frustrations – themes



GWRC panel – frustrations – selected quotes

- *“Expensive public transport, too much traffic, not feeling safe when cycling on the streets.”*
- *“Traffic congestion and inefficient public transport.”*
- *“Really poor traffic management, unreasonable governance (like getting rid of trolley buses), lack of roadside parking (especially for motorcycles) and the irrational attitude to growth.”*
- *“The lack of progress on road transport link to Airport. Traffic congestion around Basin Reserve.”*
- *“The traffic, cost of parking and how you can not use Snapper on the trains!”*
- *“Finding car parking that doesn't cost a fortune.”*
- *“Expensive parking, streets cluttered with cars, restrictive gold car travel, lack of covered space in a wet climate.”*
- *“Lack of free parking and road congestion.”*
- *“Roads are my biggest issue, they don't appear to be maintained as often as they could be, and when maintenance is being done, there are almost no effective detours to cope with and manage traffic.”*
- *“Cost of housing and rent.”*
- *“Not enough buses at peak times.”*
- *“Driving across the city. New roads have not alleviated the problem - in fact I think they have contributed to worse traffic management. I am an advocate for smarter public transport options.”*

LGWM online survey – frustrations – frequencies

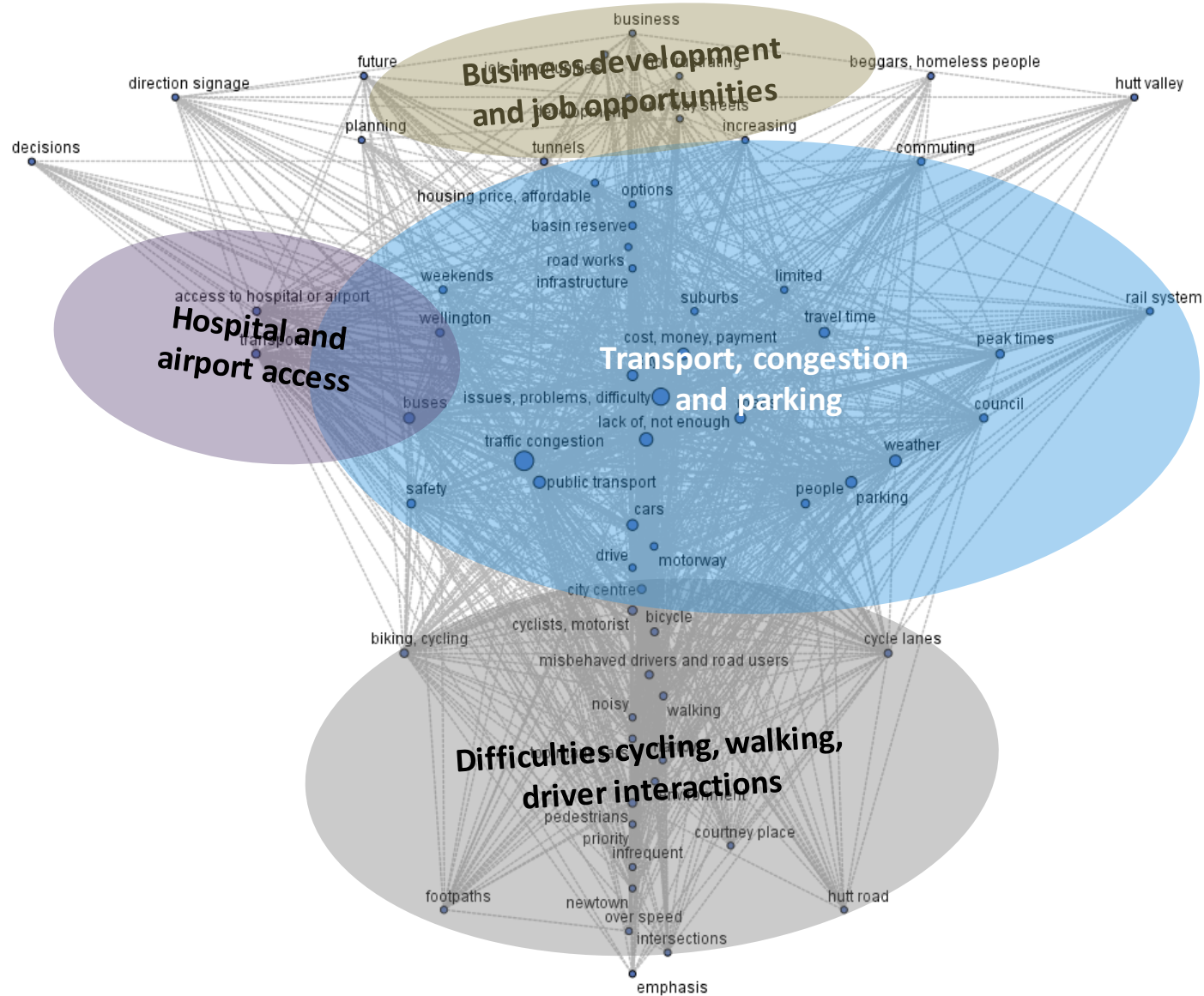


Frequencies of topics arising from the question “What is your biggest frustration with Wellington City?”

601 out of 633 responses coded.

Traffic congestion comes through very strongly, followed by public transport issues and parking, where costs feature prominently too.

LGWM online survey – frustrations – net map



LGWM online survey – frustrations – selected quotes

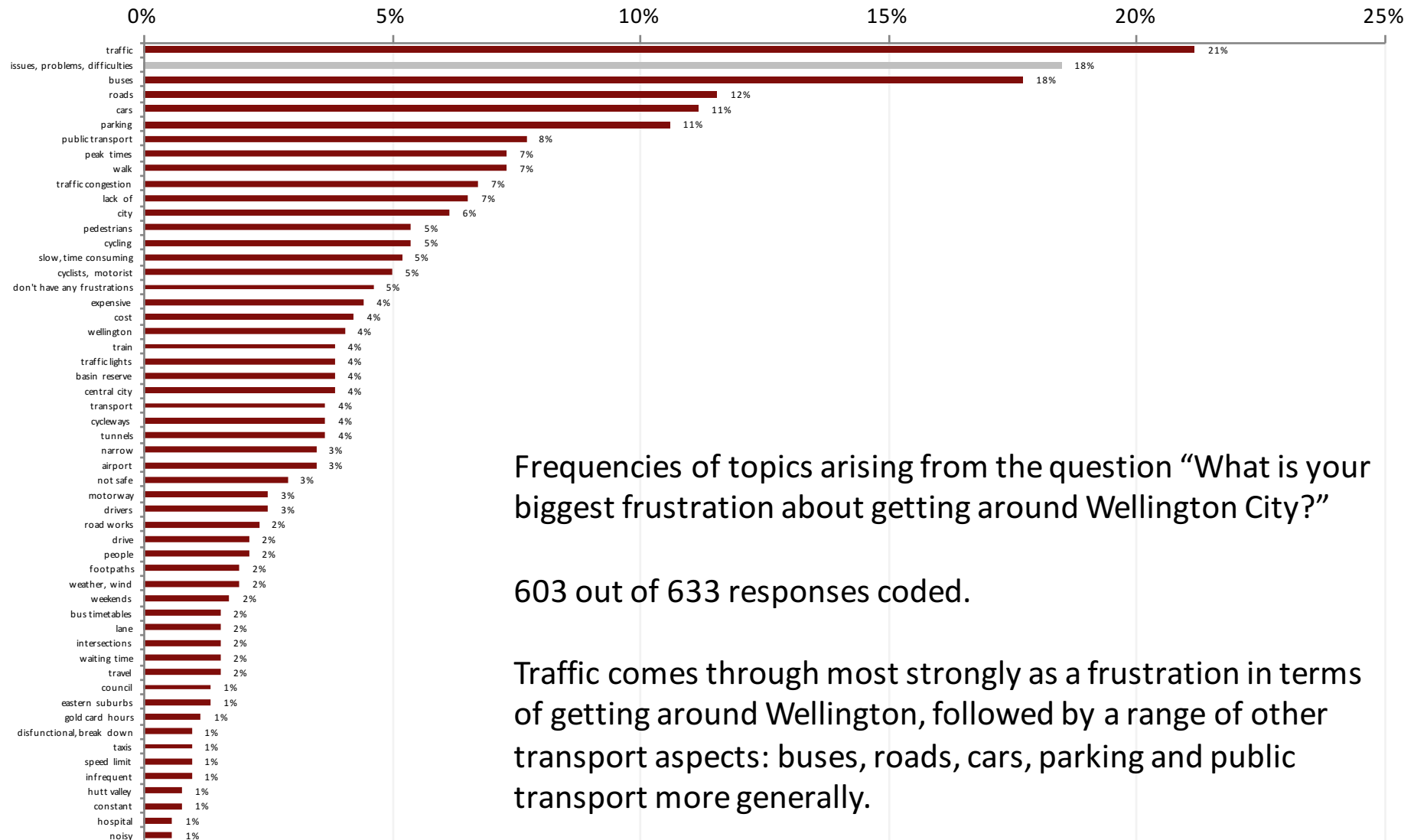
- *“The traffic around the Basin Reserve - no flow, especially from airport to city”*
- *“The traffic in and around the city now. Trying to get a carpark in the city is near on impossible, even during off-peak times. Traffic jams especially around the Basin Reserve.”*
- *“Traffic, lack of parking, expensive parking, poor public transport options.”*
- *“Poorly planned bus schedules do not match demand, traffic congestion is terrible even outside of commuter periods, including weekends.”*
- *“Wellington should at the very least have strong, efficient, cheap transport to the airport, hospital, and attractions like Te Papa. The Basin Reserve, and Mt Vic & Terrace tunnels are huge bottle-necks in the city - and main arteries such as Vivian street shouldn't have traffic lights stopping the flow of traffic.”*
- *“The procrastination of the WCC, GWCC, NZTA and other authorities over the obvious improvements that can be made to traffic flow around the Basin Reserve. Particularly the removal of car parking on the Southern side of the Basin and the realignment of the lanes to allow two specific lanes for traffic turning into Adelaide Road and two specific lanes for traffic heading toward the West/motorway.”*
- *“Public transport to city suburbs, delays and lack of priority for buses on the roads.”*
- *“Traffic, cost of parking and cost of public transport.”*
- *“Lack of prioritising public transport.”*
- *“The public transport! It's never on time, there is never enough of it, and it's really expensive!”*

**“My biggest
frustration about
getting around
Wellington City...”**

Frustrations getting around Wellington – summary

- In some surveys, respondents were asked specifically about their frustrations getting around Wellington City (rather than “general” frustrations as per previous slides). The main themes evident from the responses to this question were around public transport and traffic congestion.
 - In the GWRC panel survey “traffic” (21%) was the most-mentioned phrase, while “buses” (18%), “roads” (12%), and “cars” (11%) were the third, fourth, and fifth most mentioned phrases.
 - In the LGWM online survey “buses” (17%), and “traffic” (15%) were the first and third most mentioned phrases.
- Other strong themes were the specific traffic issues around the Basin Reserve, access through to the airport and hospital, as well as issues with cyclist and motorist safety particularly with regard to narrow roads and cycleways.
 - In the LGWM online survey “cycling” was the fourth most mentioned phrase at 11%.
 - Factor analysis for both surveys indicates that the terms “cycling” and “safety” are particularly highly correlated.

GWRC panel – frustrations getting around Wellington



Frequencies of topics arising from the question “What is your biggest frustration about getting around Wellington City?”

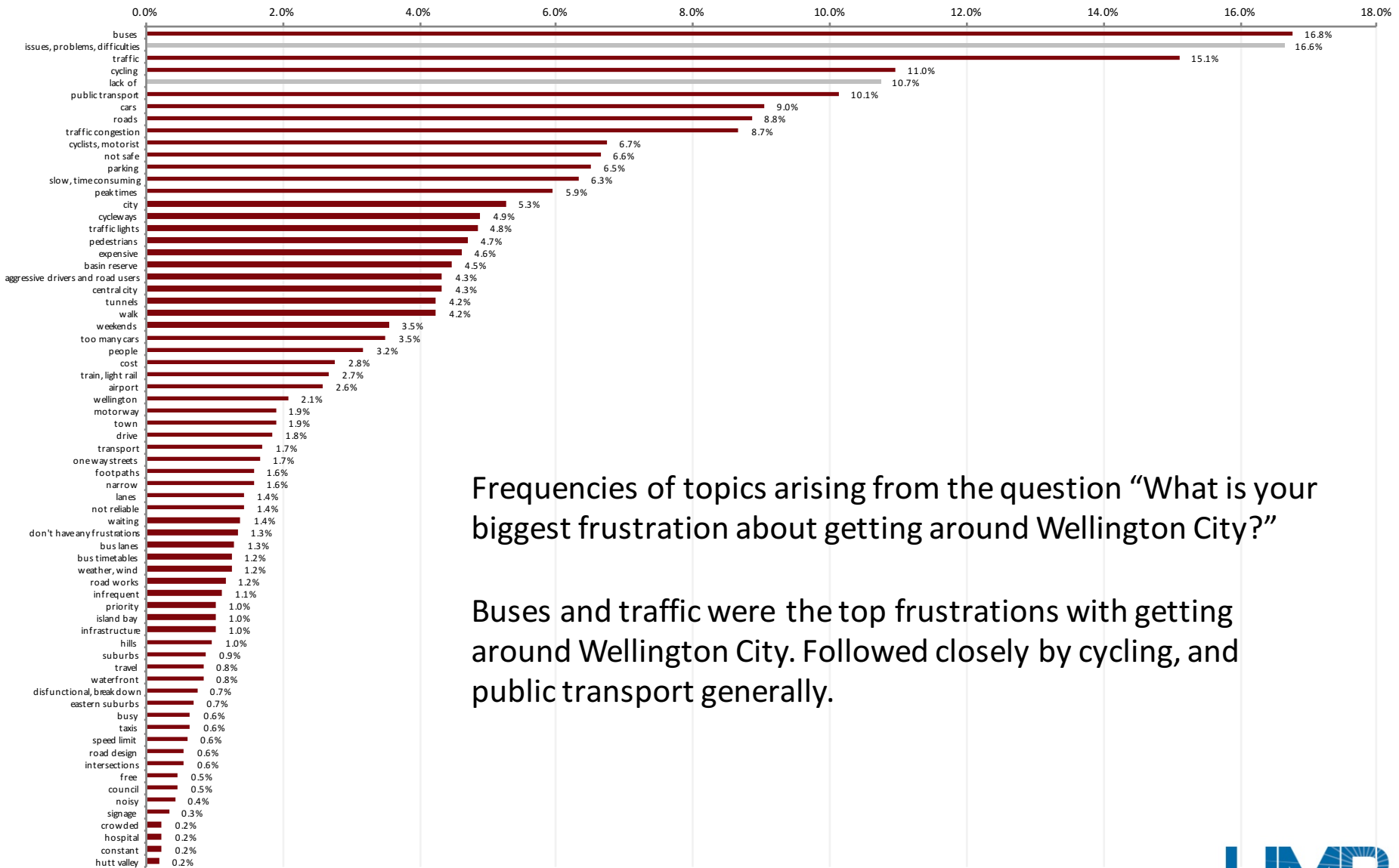
603 out of 633 responses coded.

Traffic comes through most strongly as a frustration in terms of getting around Wellington, followed by a range of other transport aspects: buses, roads, cars, parking and public transport more generally.

GWRC panel – frustrations getting around – selected quotes

- *“The seemingly endless road construction and traffic congestion.”*
- *“Traffic congestion. The buses are slow and many of the roads are dangerous to cycle on so car alternatives are not very attractive.”*
- *“It's not very cycle safe, and peak traffic is slow. There are too many cars in the CBD.”*
- *“Traffic congestion off the motorway, around the Basin, Mt Vic tunnel etc. to airport.”*
- *“Traffic flow caused by poor road work decisions plus the lack of good phasing on the lights.”*
- *“Peak hour traffic, particularly the Mt Vic Tunnel, Kent and Cambridge Terrace, Basin Reserve and access to and from the Motorway SH1.”*
- *“Fragmented public transport system and lack of realistic choices in travel.”*
- *“Too many people using cars going to go into town at peak times instead of public transport.”*
- *“Although improvements have been made in recent years, cost and reliability of public transport is still frustrating, Improvements to public transport, by way of council subsidies, would be an easy way to reduce general traffic congestion in the CBD. Reducing ticket prices and increasing the number of buses could dramatically increase patronage.”*
- *“Expensive public transportation.”*
- *“The seemingly endless road construction and traffic congestion.”*

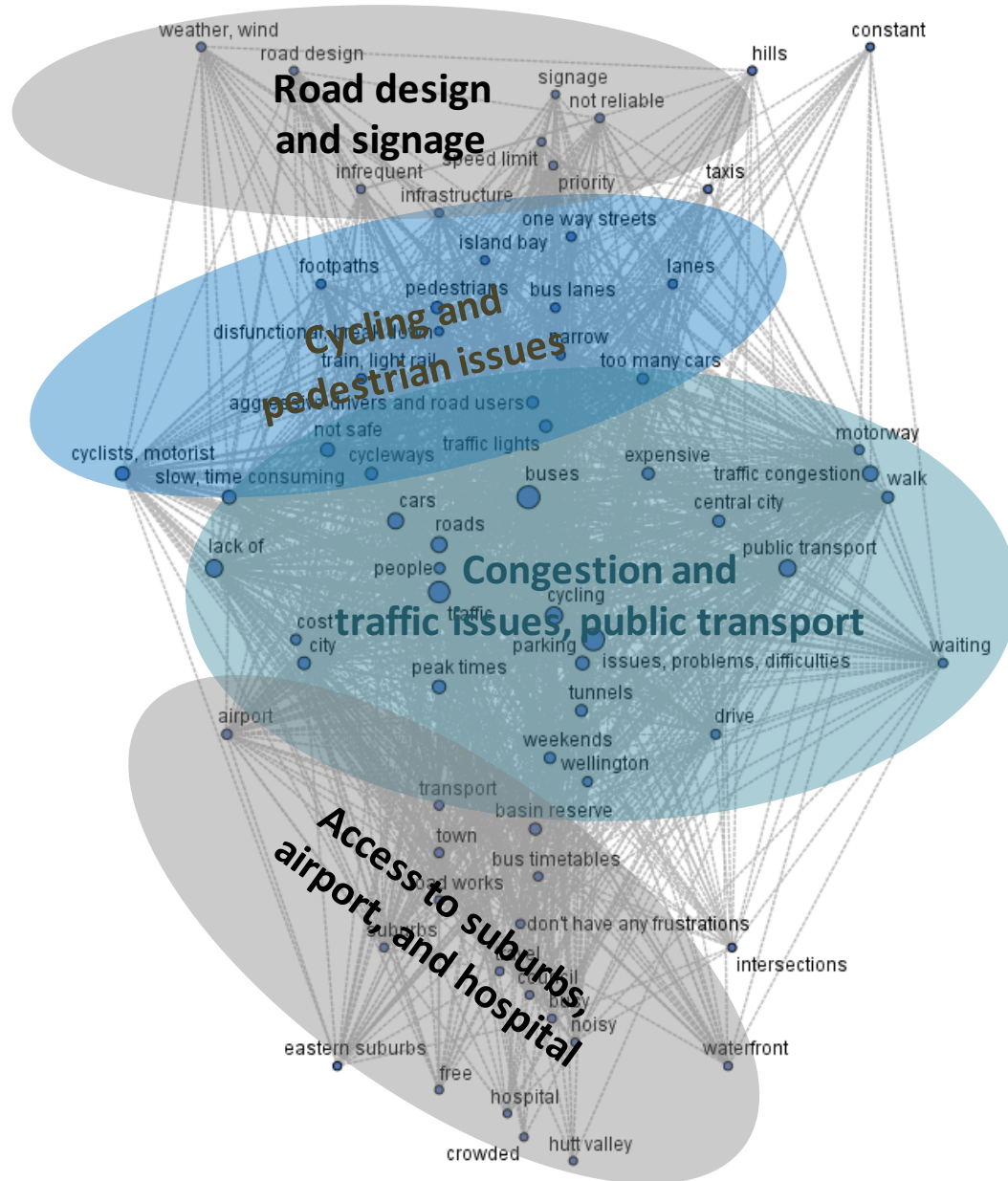
LGWM online survey – frustrations getting around Wellington



Frequencies of topics arising from the question “What is your biggest frustration about getting around Wellington City?”

Buses and traffic were the top frustrations with getting around Wellington City. Followed closely by cycling, and public transport generally.

LGWM online survey – frustrations getting around Wellington



LGWM online survey – frustrations getting around – selected quotes

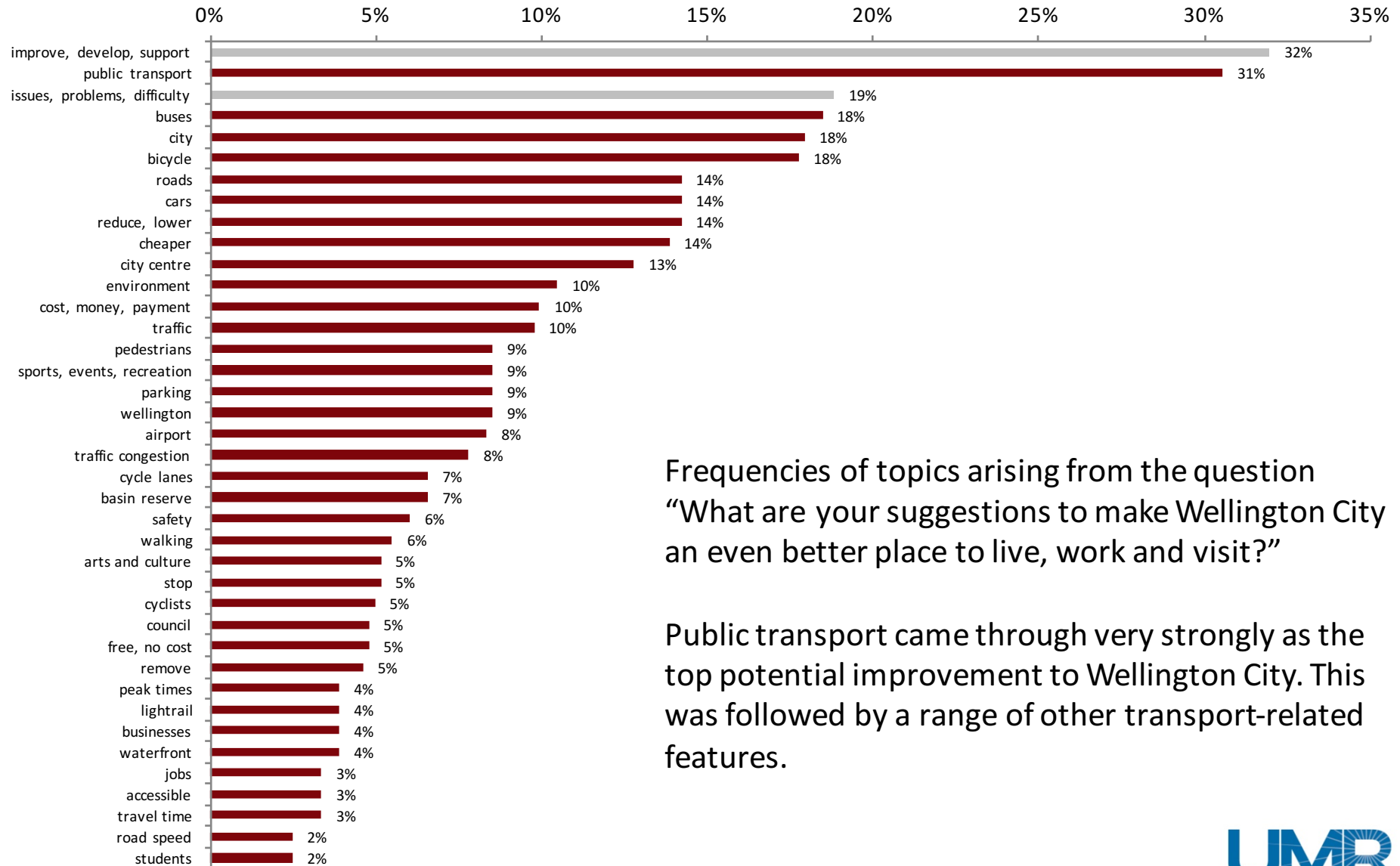
- *“Lack of cycle lanes and dedicate bus lanes, why do buses have to sit in traffic?”*
- *“Lack of connectivity in the public transport system. E.g. difficult to get north from Johnsonville, three different tickets for the train, Newlands buses and city buses.”*
- *“Too many cars with one person in them holding up buses with 40 people in them.”*
- *“Buses aren't given enough priority - bus lanes, where they exist, are short and people often park in them.”*
- *“Motorway just stops in the middle of town rather than providing a way through that does not create the traffic chaos we have today around the Basin.”*
- *“The train station is at the end of the city, traffic is crazy, public transport is lacking and expensive.”*
- *“Traffic around Basin and Lower Hutt Motorway.”*
- *“Buses are not frequent enough. No single ticket for bus/train. And the public transport is so over-priced!”*
- *“Lack of weekend public transport options, growing traffic congestion.”*
- *“Traffic congestion in Eastern Suburbs – airport traffic, the tunnel and Basin Reserve.”*
- *“The extremely poor and/or non-existent cycling infrastructure. The prioritisation of cars and space allocated for private vehicle travel in the city, to the detriment of pedestrians, cyclists, and public transport users.”*
- *“Irregular, unreliable, expensive public transportation.”*
- *“The public transport is not reliable and very expensive.”*

**“Suggestions to
make Wellington City
an even better place
to live, work and
visit...”**

Making Wellington City even better – summary

- In terms of making Wellington City even better, the strongest theme across the surveys was improving and developing the public transport system specifically, but more generally, improving transport networks including roading and cycleways.
 - In the WCC panel survey "public transport" (31%) was the standout in terms of frequency of concrete concepts mentioned in responses. This was followed by "buses" (18%), "bicycles" (18%), "roads" (14%), and "cars" (14%) - all in the top seven most popular terms.
 - In the GWRC panel survey the picture was similar. From the hand-coded responses, 36% of answers related to improving the transport networks generally, while 8% were related to cycling facilities. The automated frequency analysis brought out the strong public transport focus, with 20% of responses (the top specific concept) citing "public transport" specifically.
 - In the LGWM online survey "public transport" (on 26%) was the top response, with "cycling, motor cycling" (14%), "cars" (14%), "buses" (12%), and "roads" (12%) all in the top eight most popular phrases.
- Issues around the cost of public transport and parking were also evident.
 - In the WCC panel the phrases "reduce, lower" (14%), "cheaper" (14%), "cost, money, payment" (10%), and "parking" (9%) were all fairly frequent.
 - In the GWRC survey 11% of the hand-coded responses related to making parking more accessible.
 - In the LGWM online survey the phrases "reduce, lower" (13%), and "cheaper" (10%), both appeared within the top dozen responses in terms of frequency.

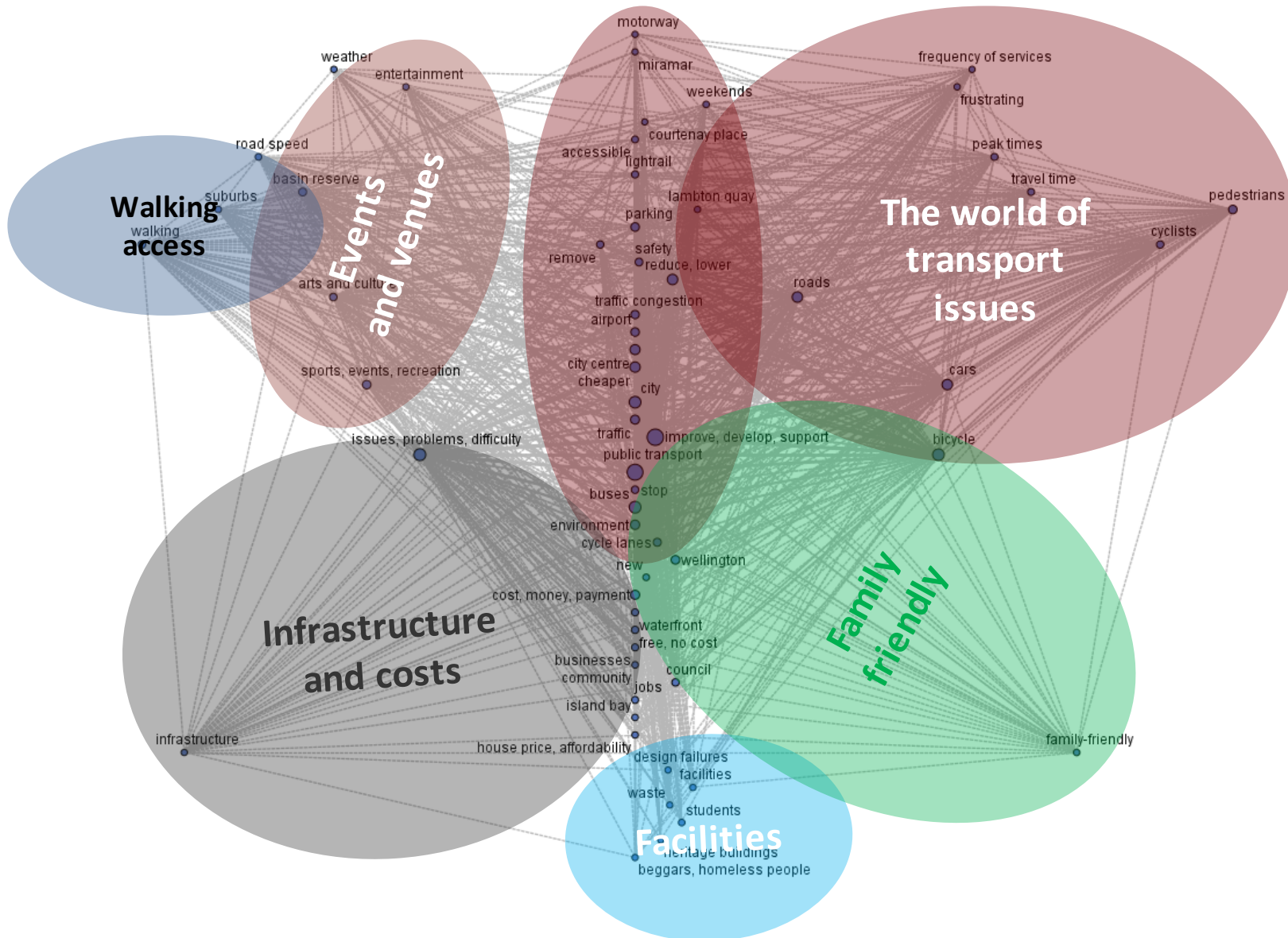
WCC panel – things to improve – frequencies



Frequencies of topics arising from the question “What are your suggestions to make Wellington City an even better place to live, work and visit?”

Public transport came through very strongly as the top potential improvement to Wellington City. This was followed by a range of other transport-related features.

WCC panel – things to improve – net map



WCC panel – things to improve – selected quotes

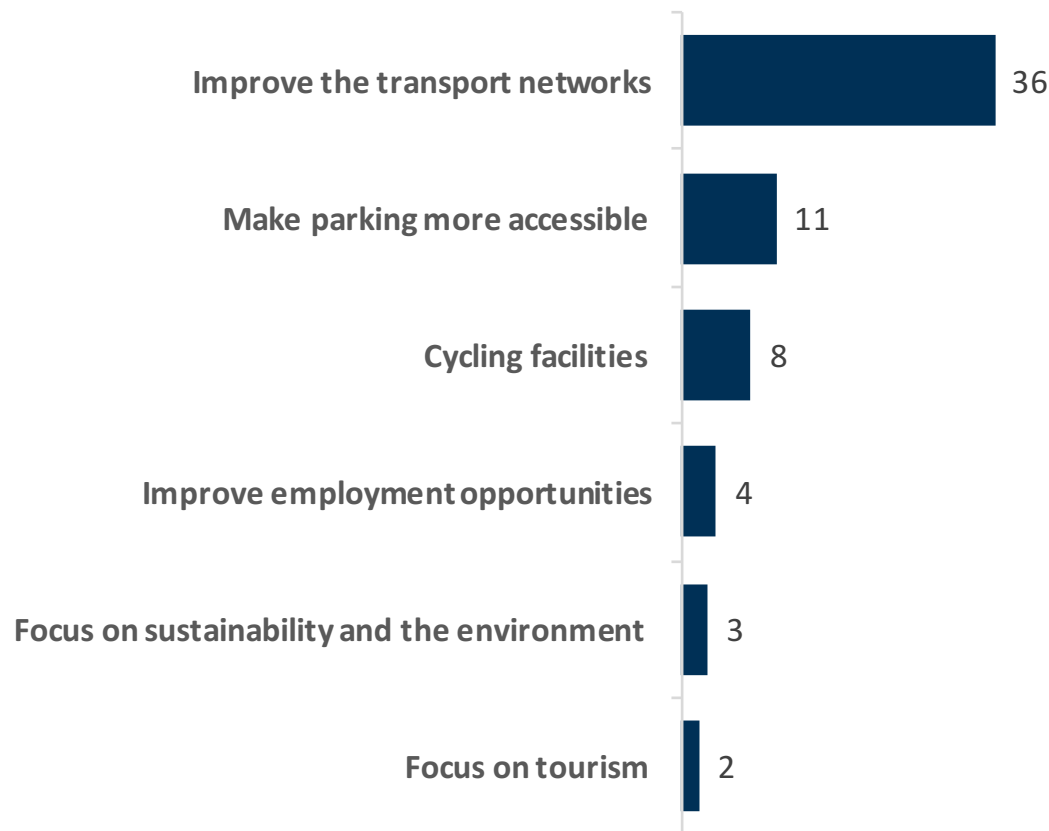
- *“Improved public transport and cycle lanes etc. to encourage less cars on the road.”*
- *“Lower costs of public transport to discourage driving.”*
- *“Invest in better public transport to reduce traffic congestion.”*
- *“Focus on public transport and cycling infrastructure, as well as putting in place infrastructure for low and zero emissions vehicles. Strive to be a carbon neutral city.”*
- *“Address housing issue directly. This problem will only get worse. People are being forced further and further out of the city which increases the burden on roads and public transport. Invest in affordable housing in the city. Penalise landlords who rent substandard housing, or help them create healthy long-term rental homes for the people who make this city what it is - a vibrant, engaged community of hard-working creative professionals.”*
- *“Concentrate on easing traffic congestion.”*
- *“Make public transport more accessible, affordable and efficient. Make parking charges more affordable.”*
- *“Focus infrastructure development on walking, cycling and public transport. Continue connecting Wellingtonians to their natural environment. Make public transport cheaper - for my purposes it is exceptionally accessible, but quite expensive.”*
- *“Have integrated ticketing between train, ferry, bus and cable car.”*
- *“Ease the traffic congestion around Basin Reserve and add more tunnel lanes in Victoria tunnel.”*

GWRC panel – Making Wellington even better – hand-coded

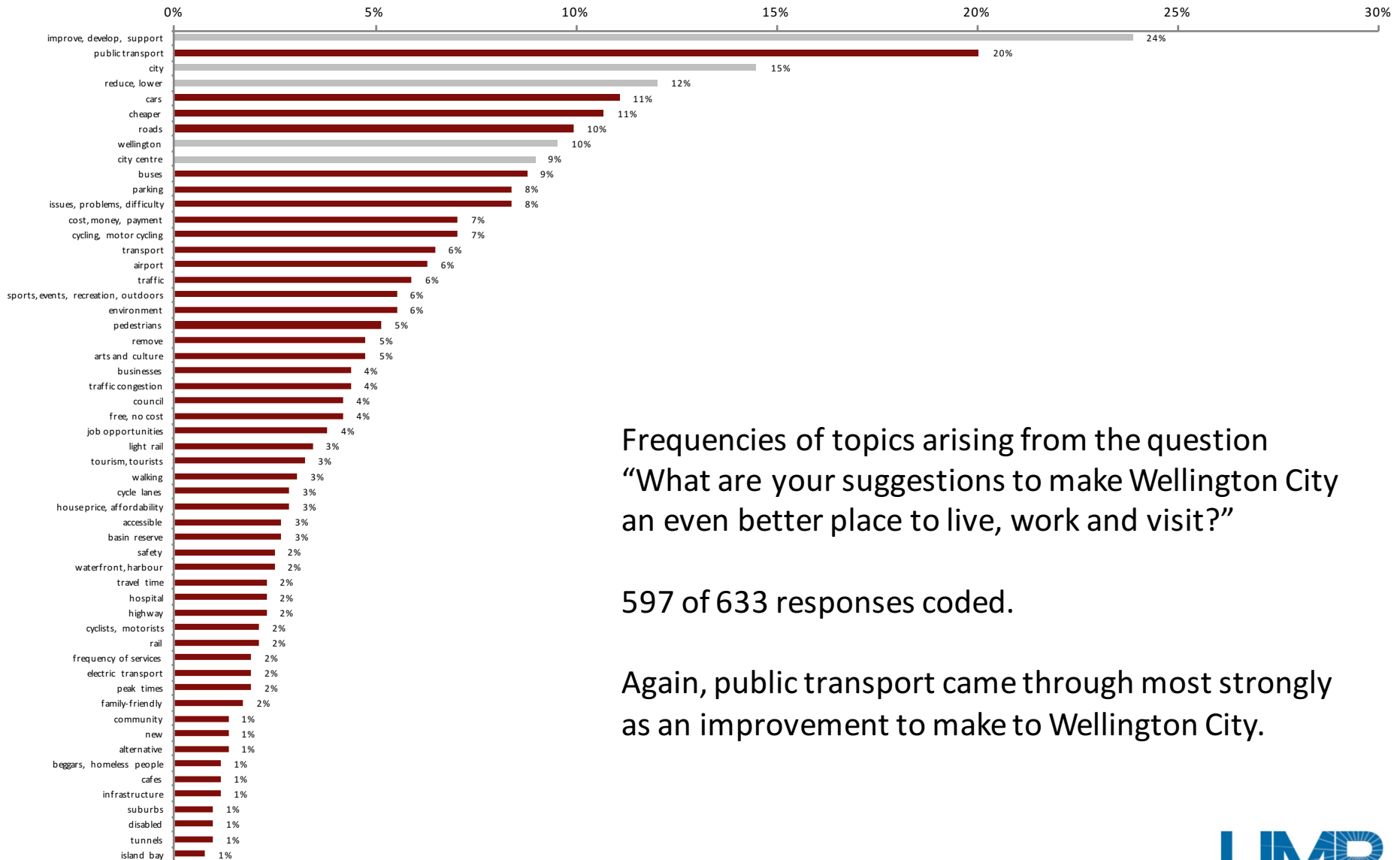


What do you think should be done to make Wellington City an even better place to live, work and visit?

GWRC panel



GWRC panel – improvements – frequencies

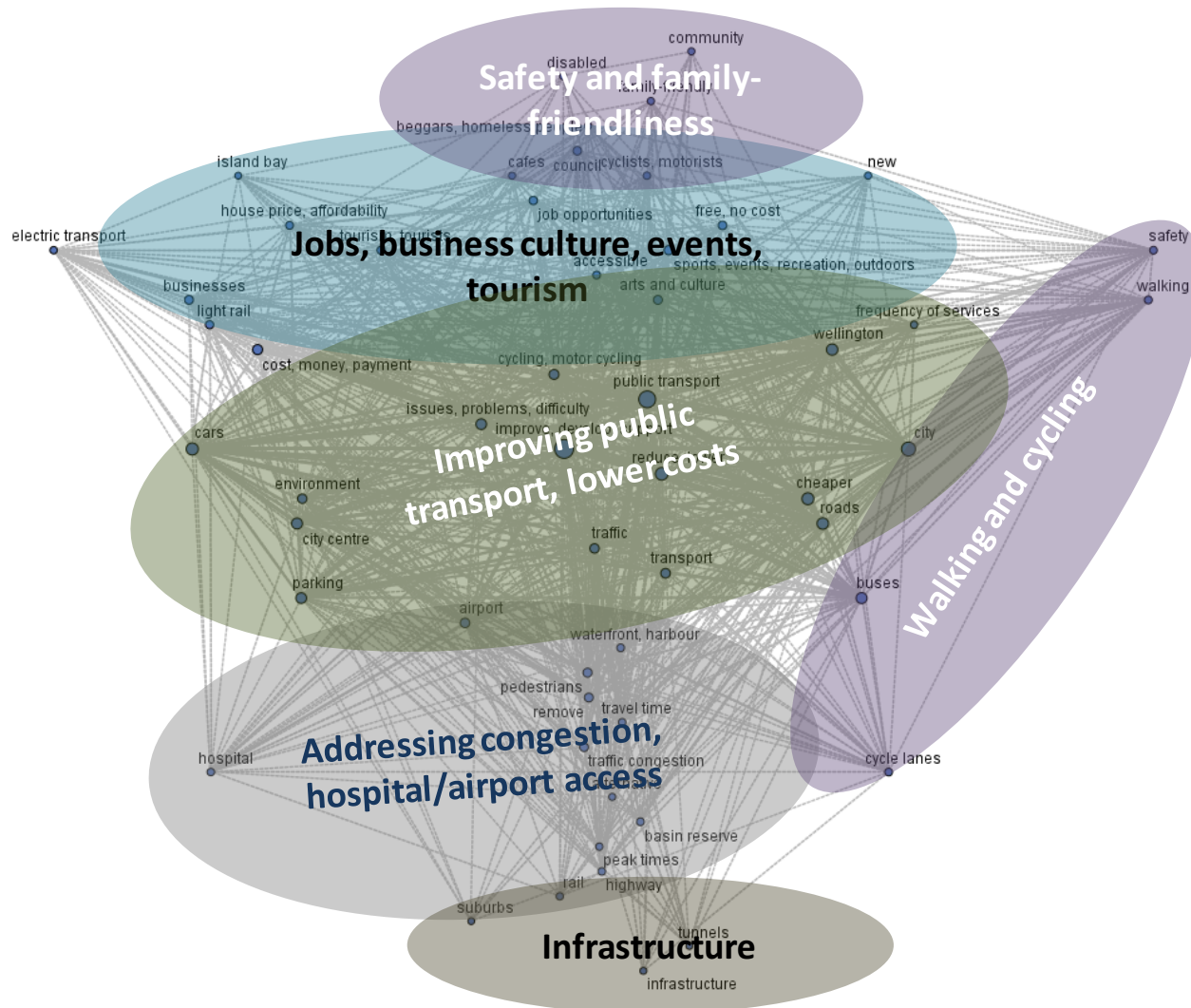


Frequencies of topics arising from the question
 “What are your suggestions to make Wellington City
 an even better place to live, work and visit?”

597 of 633 responses coded.

Again, public transport came through most strongly
 as an improvement to make to Wellington City.

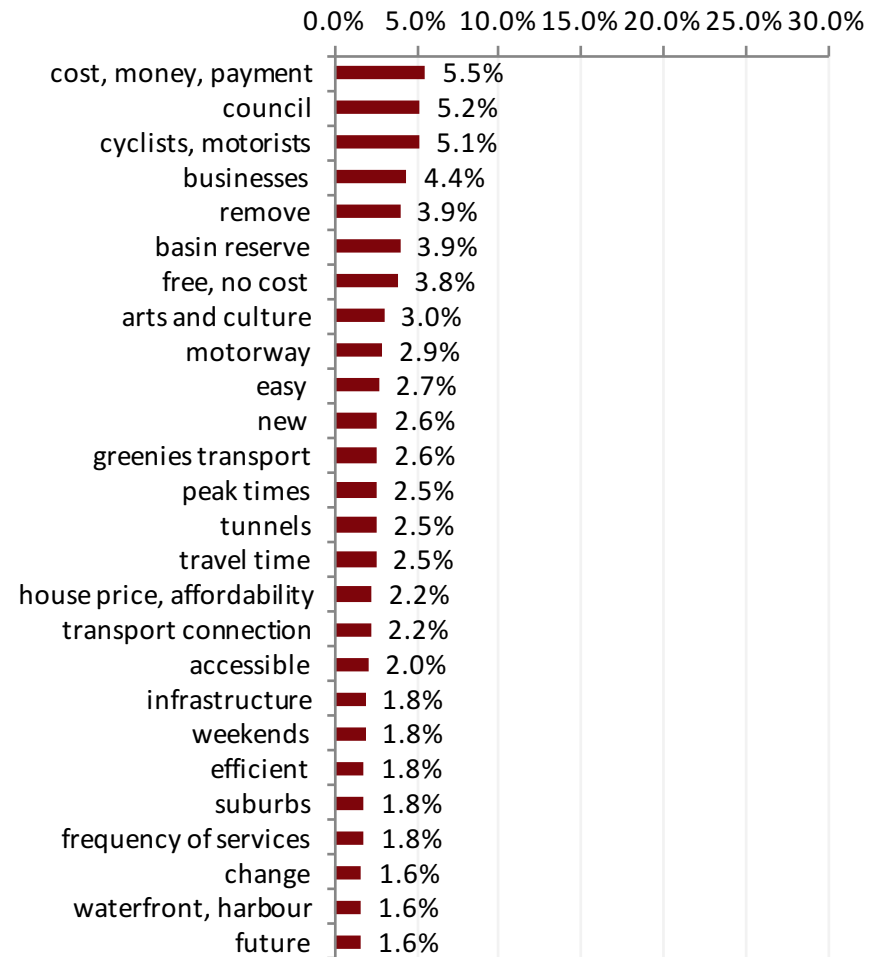
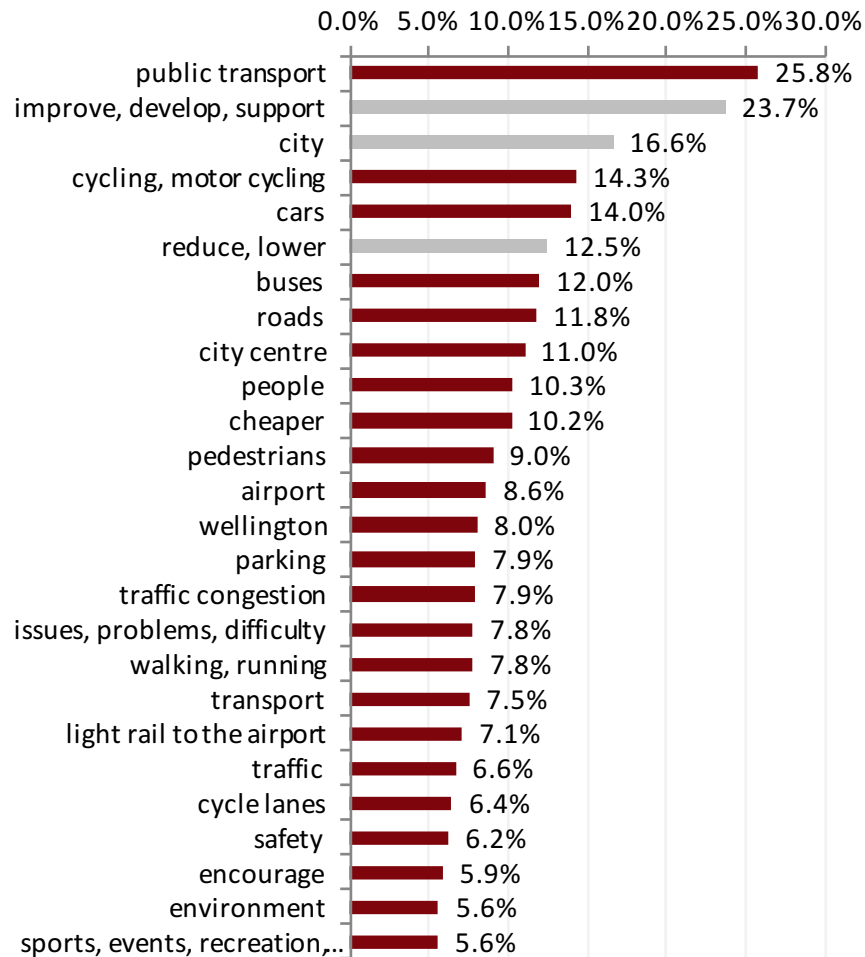
GWRC panel – improvements – themes



GWRC panel – improvements – selected quotes

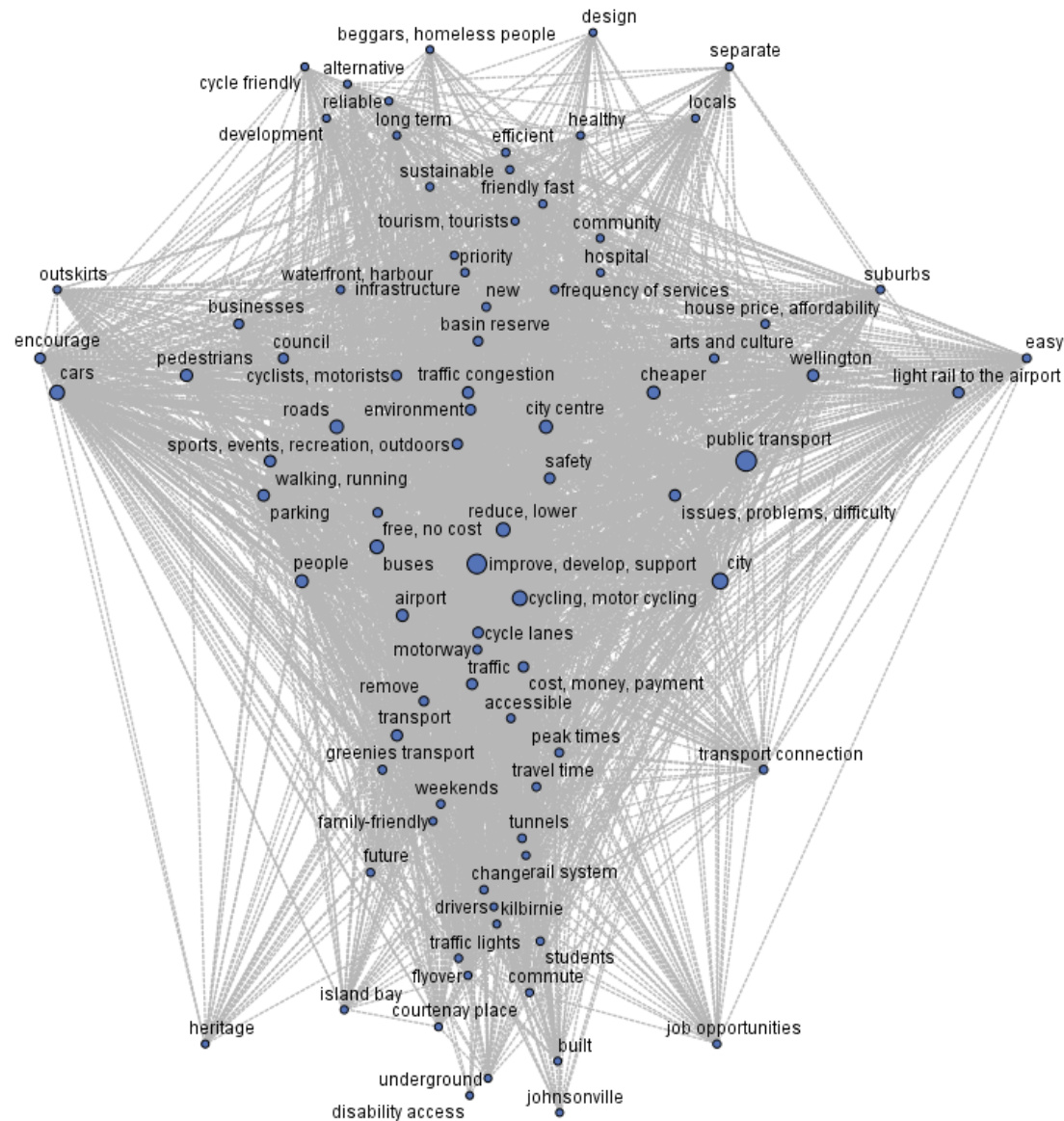
- *“More frequent public transport in peak travel times.”*
- *“Try to make Wellington an affordable city to live, cheap public transport.”*
- *“Create quality and efficient public transport that is easy to use, gets you to your place of destination quickly and with ease that when considering private vehicle over public, public transport will outshine over the hassle, costs and stresses of driving in a private vehicle.”*
- *“Ensuring public transport continues to run well, keep the prices low as possible. Try to keep rates for houses down. Find some ways to entice new businesses into the region and to maybe somehow reward existing businesses, by using a rebate system or lower leases or rates for a year.”*
- *“Light rail, and a more integrated public transport system with a common ticket system for example like Sydney's Opal card that you can use on everything.”*
- *“Invest more in public transport and cycling infrastructure to get people out of cars and increase pedestrianisation of the central city.”*
- *“Sort out the transport issues; mainly the traffic jams in the morning and evening. Need more people taking public transport like the trains.”*
- *“Have a more affordable public transport network and maintain or increase public outdoor spaces that are safe and family friendly.”*
- *“Drive business and employment growth whilst controlling house prices, and investing in suburban living (cafes, restaurants, public transport, public grounds etc) to ease the pressure on the inner city.”*

LGWM online survey – improvements – frequencies



Public transport improvements are overwhelmingly the dominant sentiment in terms of frequency analysis.

LGWM online survey – improvements – net map



Thematic overlays don't add much to this very dense net map. Separate factor analysis suggests broadly similar territories of concern to other surveys: issues of traffic and congestion, reduction of cars, increased safety for cyclists and pedestrians and cheaper, more accessible public transport. A focus on creating a business- and family-friendly city comes through too, with "addressing social issues" and "arts and culture" present as well.

LGWM online survey – improvements – selected quotes

- *“Invest in better transport options, including more frequent and reliable public transport. Provide safe cycleways across the entire city. Reduce the car speed in the CBD, and pedestrianise more CBD streets.”*
- *“Get an integrated public transport ticketing system and more cycleways along main transport routes (or parallel routes)”*
- *“Spend less on roads and more on efficient integrated electric public transport, including light rail, initially along the high-demand corridor between the railway station and airport”*
- *“Implement more "Park and Ride" option to encourage public transport over personal car use.”*
- *“Make public transport cheaper. Extend the airport runway. Install more/better shelter along the main footpaths in the central city to protect pedestrians against bad weather.”*
- *“More frequent and more reliable public transport, encouraging more people to take public transport and reducing congestion on the roads.”*
- *“Make public transport a top priority to make easy connections between suburbs, city and important places like airport and hospital.”*
- *“Expand the road ways around the Basin Reserve, adding more lanes, removing car parking and creating an intelligent traffic light phasing system.”*
- *“Sort out the traffic problem at the Basin Reserve/Mt Vic tunnel. I have lived in the eastern suburbs for over 40 years and there has always been a bit of a problem during the week. Now it is a BIG problem at all times with traffic getting built up both sides of the tunnel. I like the idea of another tunnel with traffic moving one way in each. We got rid of Athletic Park so why can't we get rid of the Basin to make things smoother sailing.”*



Quantitative results: valued aspects/priorities

Most valued aspects and priorities – summary

Most valued aspects of Wellington

- Respondents in the LGWM online survey, WCC panel survey, and GWRC panel survey were asked how much they valued (on a scale of 0-10 where 0 means don't value at all and 10 means highly value) a range of prompted aspects relating to Wellington.
- Many features were ranked highly by respondents and differences in scores in many cases will not be significant.
- The most highly valued aspect in all three surveys was “The natural environment like the hills, coast and harbour”. This was followed across all three surveys by “parks and public spaces.”
- “Being pedestrian-friendly” and “focusing on an efficient and affordable public transport system” also performed strongly.
- “Being able to get around and through the city quickly and easily by car” was ranked lowest by the LGWM online respondents, but was ahead of “Plenty of options for cycling safely around town” in both the WCC and GWRC panel surveys.

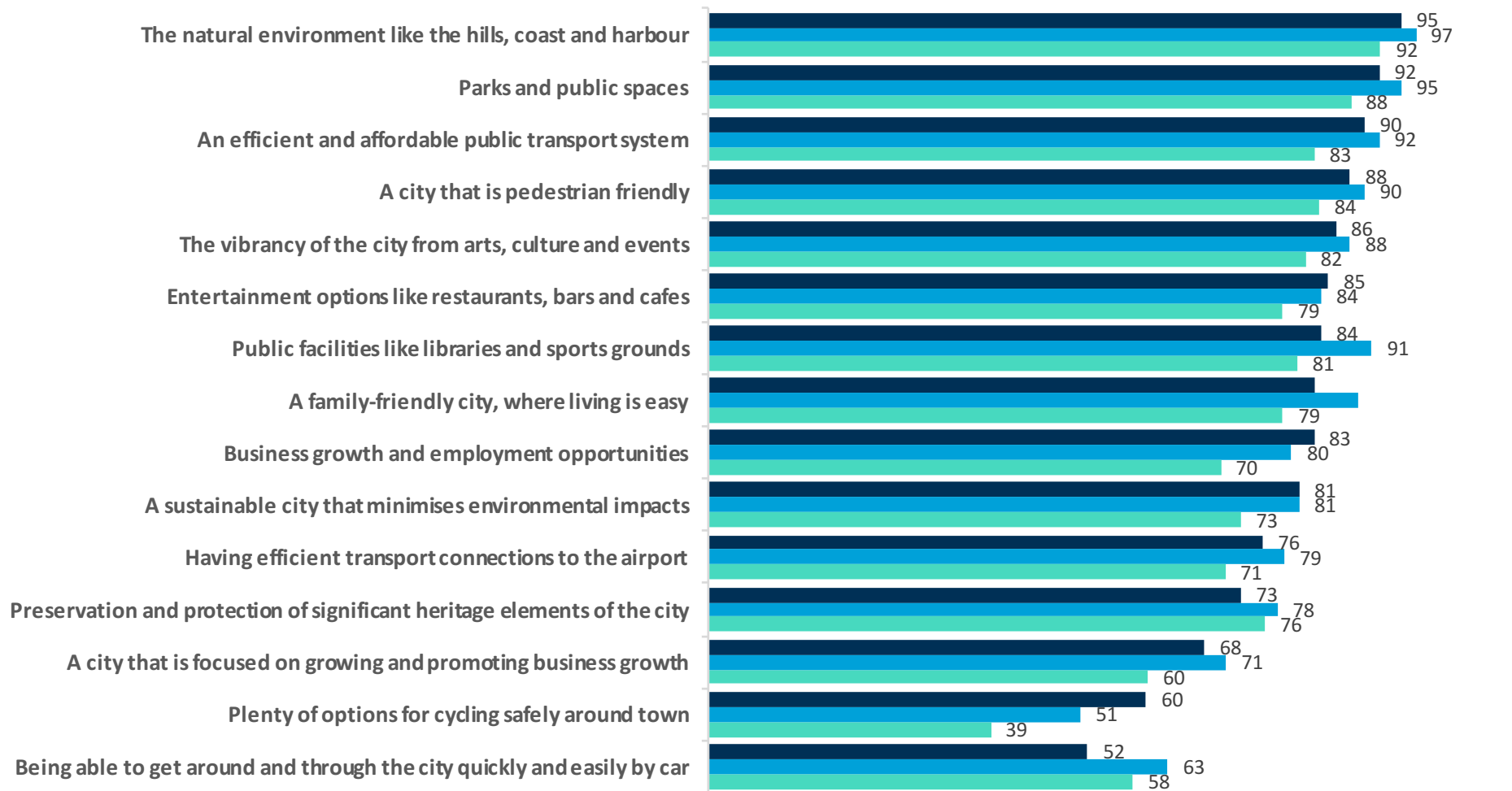
Priorities

- When respondents in the UMR telephone survey were asked to rate (on a scale of 0-10 where 0 means not important and 10 means extremely important) how important a range Wellington priorities were, 80% rated “improving local health services” and “increasing employment opportunities” a 7-10.
- These issues were closely followed by “addressing poverty/inequality/homelessness” and “reducing traffic congestion” which both came in on 74%.
- When asked what the most important area to focus on from a range of potential priorities, 21% of respondents in the UMR street survey identified “addressing poverty/inequality/homelessness”.
- This was followed by “reducing traffic congestion” and “sustainability and minimising environmental impacts” in the street survey with 14% in each case saying they were “most important”.

Valuing various aspects of Wellington City



Please rate how much you value the following (0 to 10 scale where 10 means "highly value" and 0 means "don't value at all")
 Percentage responding 7-10

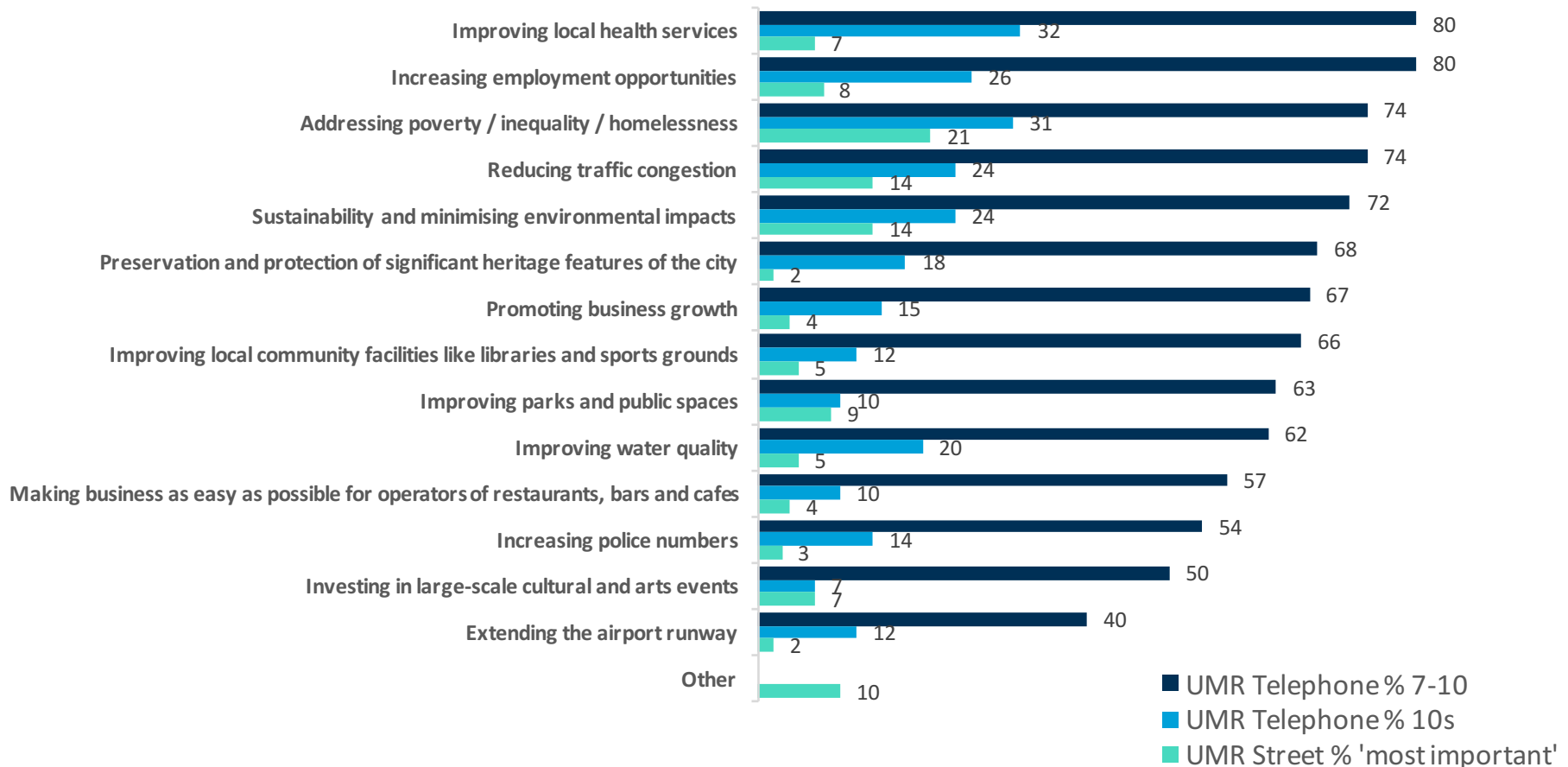


■ LGWM online (n=2503) ■ WCC panel (n=643) ■ GWCC panel (n=631)

Overall priorities – UMR telephone and street surveys



- As you'll know, there are a lot of competing priorities for funding and attention from central and local government. Using a scale of 0 to 10, where 0 means not an important priority and 10 means an extremely important priority how important is it that central and local government concentrate on the following issues in Wellington City? (Phone survey)
- As you'll know, there are a lot of competing priorities for funding and attention from central and local Government. What do you think is the **most important** area for central and local government to concentrate on in Wellington City? (Street survey)





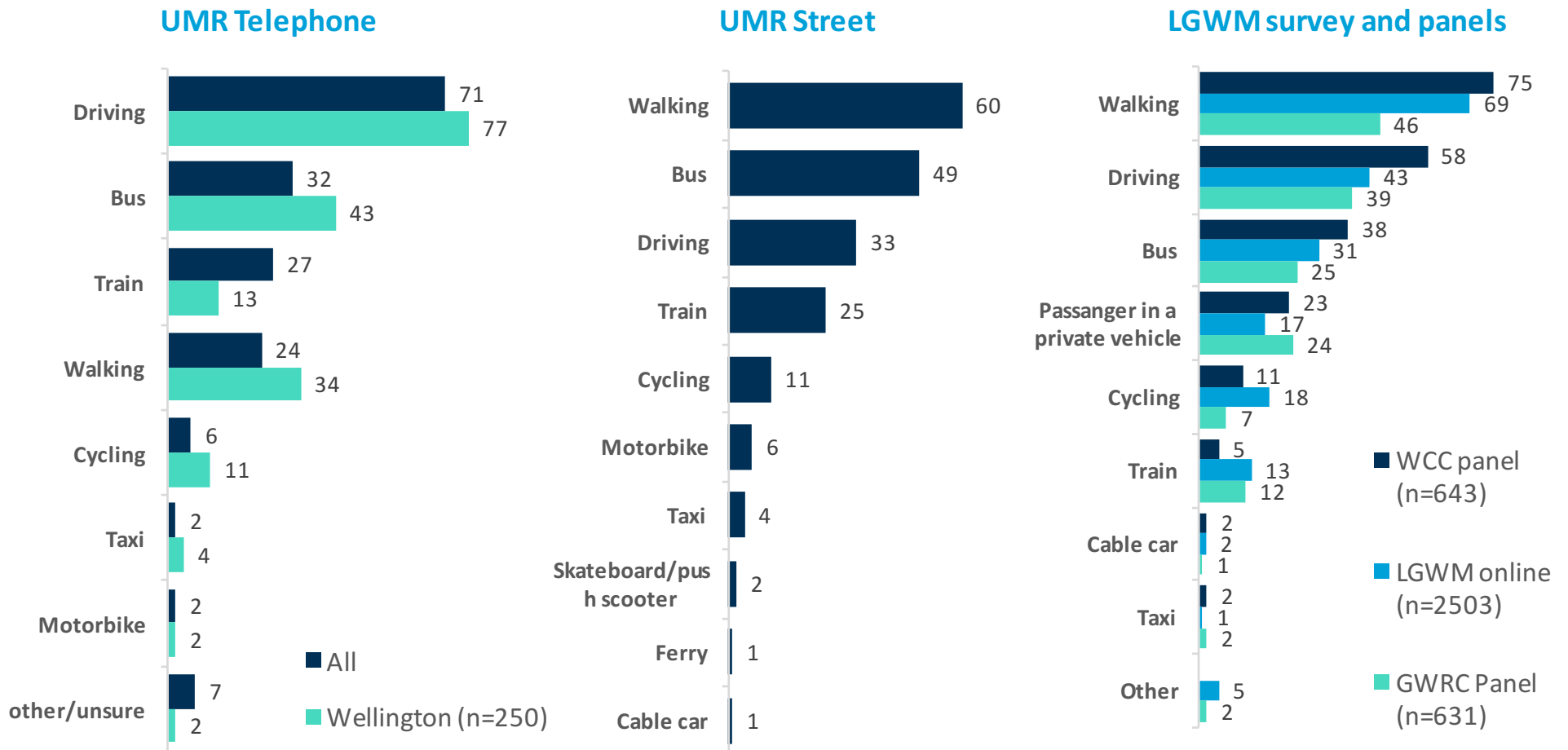
Quantitative results: transport overview

Getting around Wellington and transport issues

- In the UMR telephone survey 71% of respondents said that on a typical weekday they drive to get into and around Wellington. 32% said they use the bus on a typical weekday, and 27% the train. About a quarter (24%) said they walk to get around on a typical weekday. These results will sum to more than 100% as respondents could choose multiple transport modes. Results in this survey are statistically representative.
- In the UMR street survey (not statistically representative), where respondents were much more likely to be younger and inner city residents, walking (60%) and busing (49%) around the city were much more popular modes of transport.
- In the WCC and GWRC surveys “walking” was also the most popular mode of transport, “driving” was second, while “taking the bus” was third.
- Nearly three quarters (74%) of respondents in the UMR telephone survey (statistically representative) believed that Wellington City has a congestion problem, while 60% in the UMR street survey (not representative) thought the same.
- Of those who thought there was a congestion problem in the telephone and street survey there was agreement that the worst area was the Urban Motorway/Aotea Quay.
- When respondents in the UMR telephone survey were asked to rate (on a scale of 0-10 where 0 means not important and 10 means extremely important) how important a range of transport priorities were, the largest percentage (84%) gave a 7-10 rating for "improving public transport systems". Again, this is a statistically representative survey of the region.
- When asked what the most important transport area to focus on out of a range of transport priorities, respondents in the UMR street survey also identified improving public transport systems as the most important priority.

Getting around Wellington City – survey comparisons

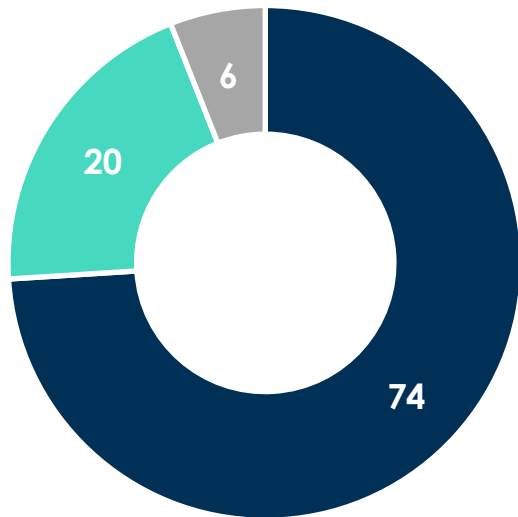
- On Monday through to Friday, in a typical week, what are all the types of transport you normally use to travel to and around Wellington City? **Percentage who selected each mode of transport, multiple response (UMR telephone/street surveys)**
- The ways I get to and around Wellington are [each mode asked] **Percentage selecting "few times a week" "every working day" "everyday/almost every day" (LGWM/WCC/GWRC surveys)**



Does Wellington have a congestion problem?

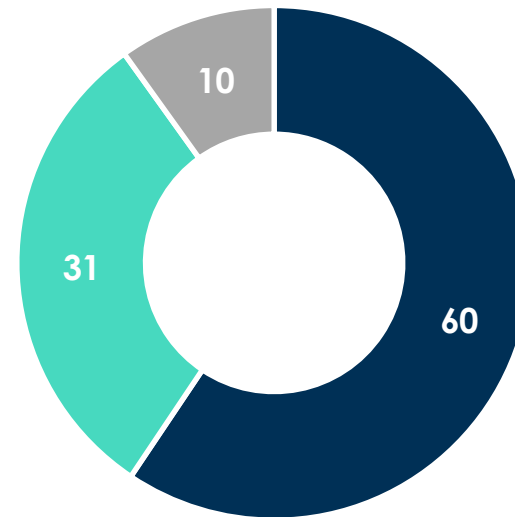
} Do you agree or disagree that Wellington City has a problem with traffic and congestion?

UMR telephone survey



■ Agree ■ Disagree ■ Unsure

UMR street survey

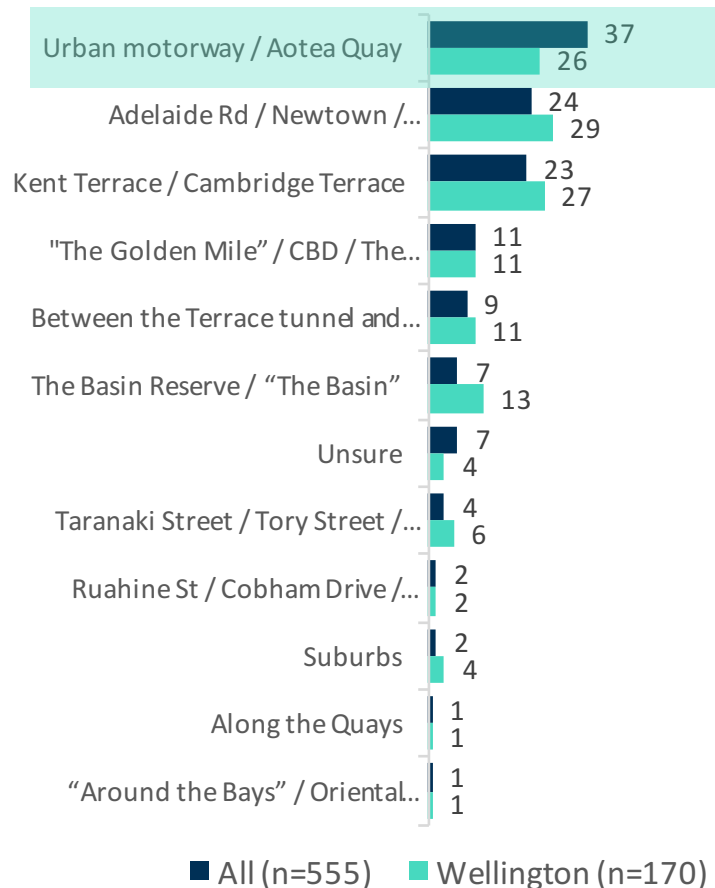


■ Agree ■ Disagree ■ Unsure

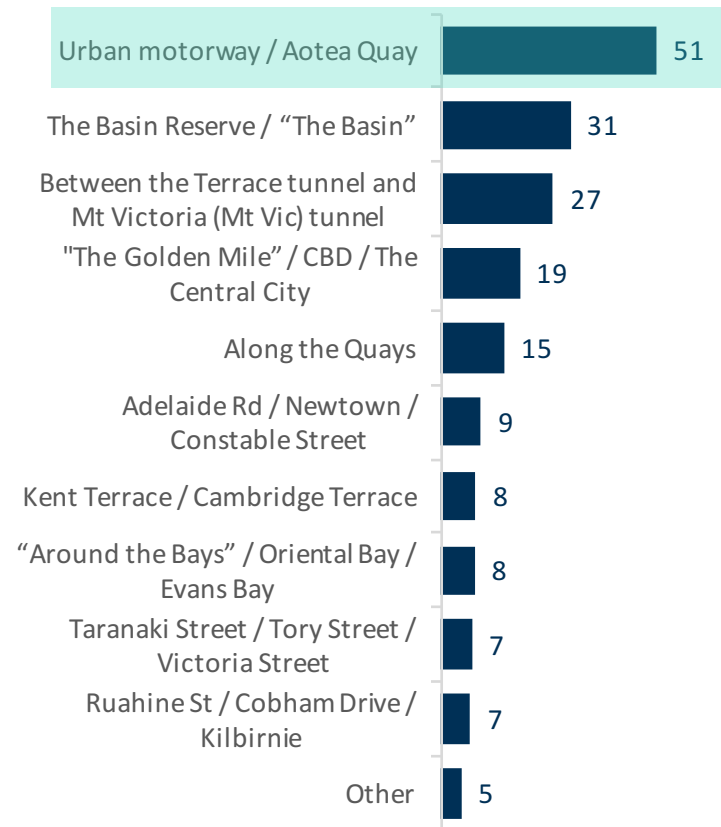
Problematic areas for congestion – UMR phone vs street

} Where in Wellington City do you think the problems are the worst? (Multiple response question)

UMR telephone survey



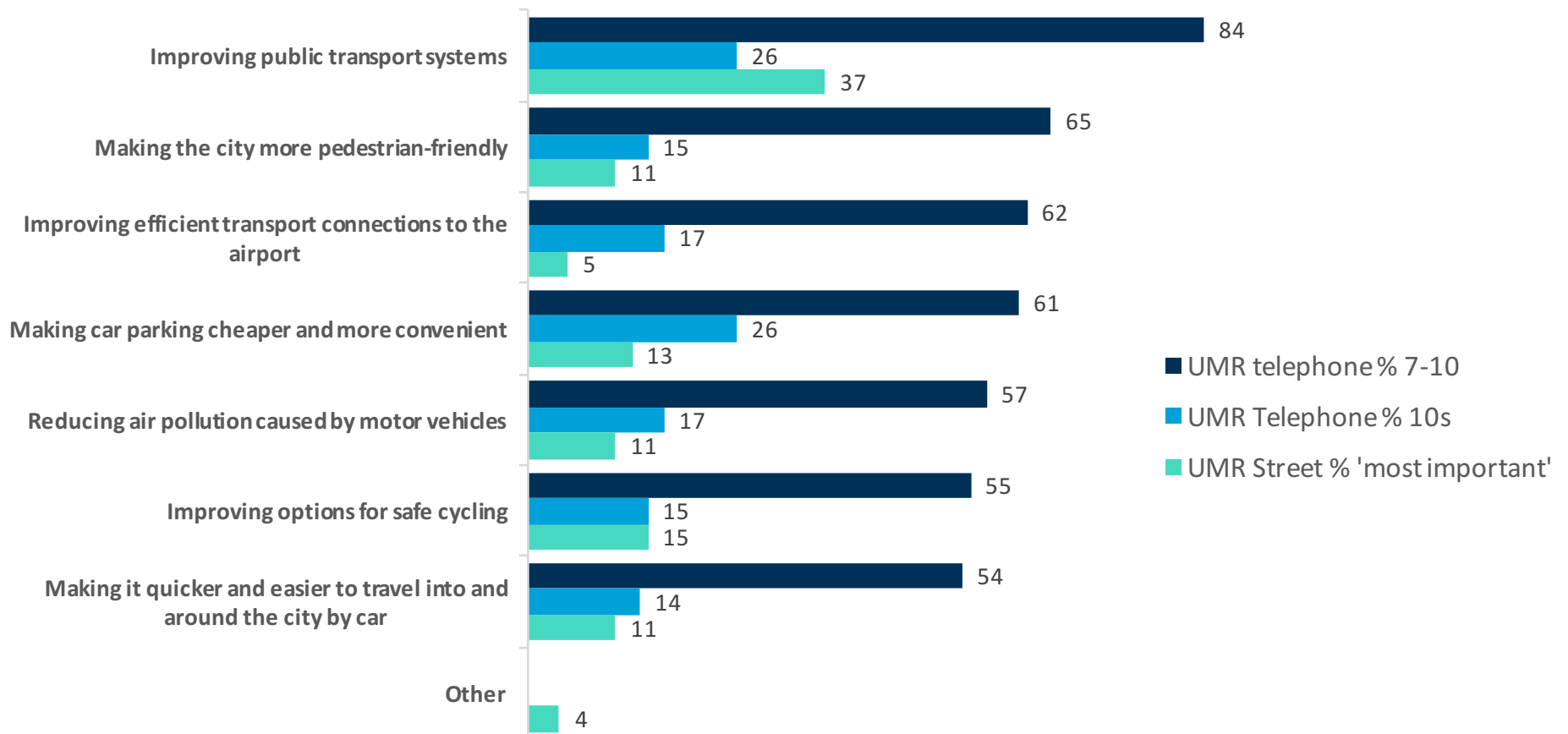
UMR street survey



Base: Respondents who agree there is a problem with congestion in Wellington City, UMR telephone n=555, UMR street n=637

Transport priorities – UMR phone vs street surveys

- Trade-offs sometimes need to be made when deciding how transport priorities should be funded. Using the same 0 to 10 scale, where 0 means not an important priority and 10 means an extremely important priority how important are the following priorities to you in terms of transport in Wellington City? (Phone survey)
- Trade-offs sometimes need to be made when deciding how transport priorities should be funded. What do you think is the **most important** area in terms of transport to direct focus in Wellington City? (Street survey)

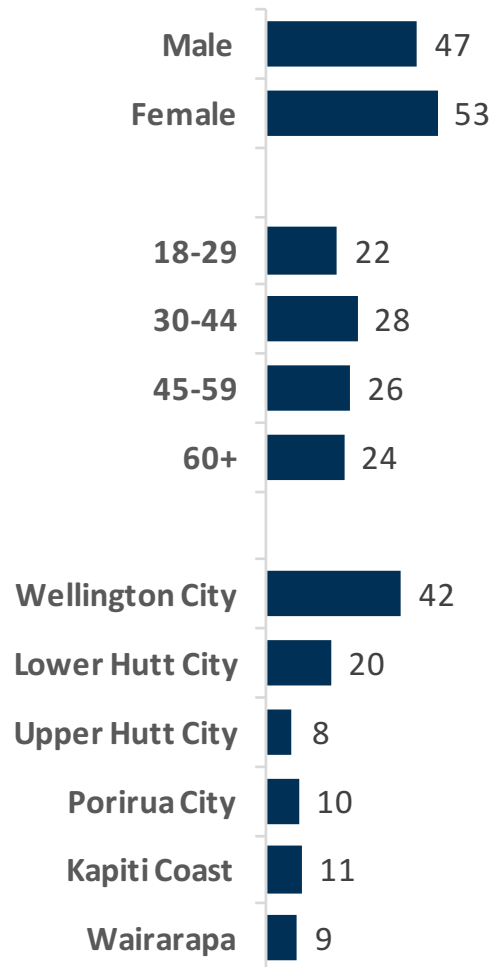




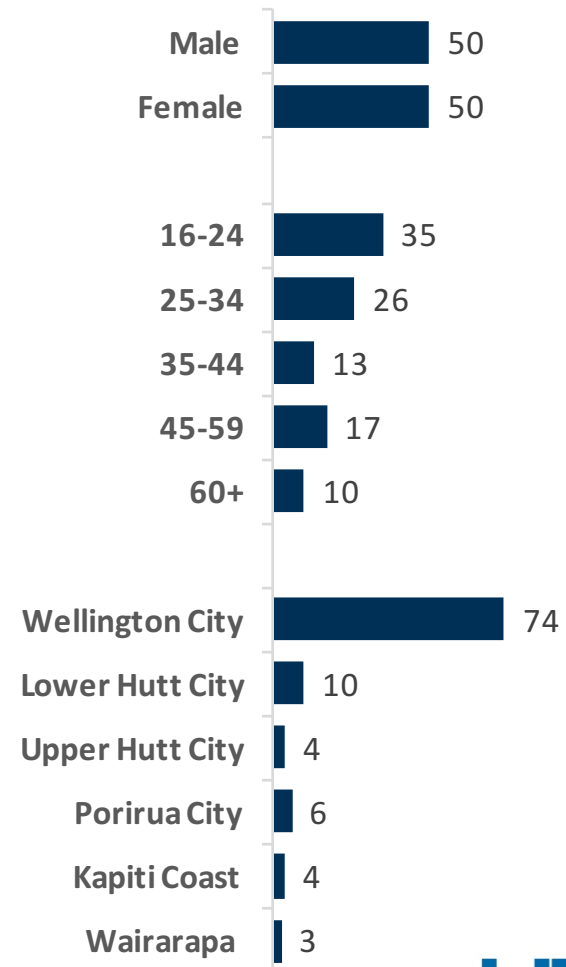
Survey demographics

Survey demographics

UMR Telephone (n=750, statistically representative)

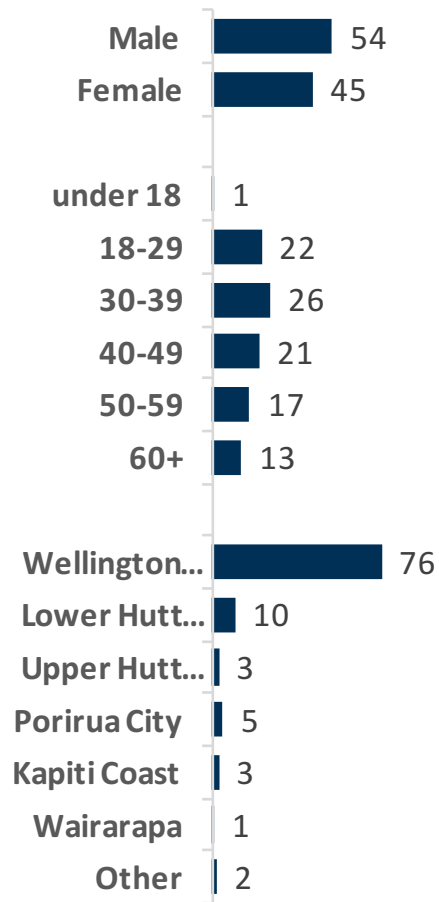


UMR Street (n=1000)

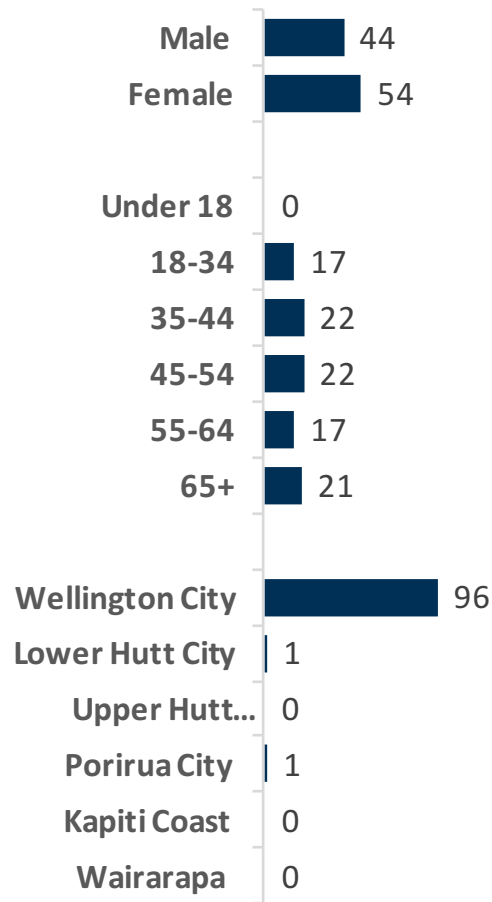


Survey demographics

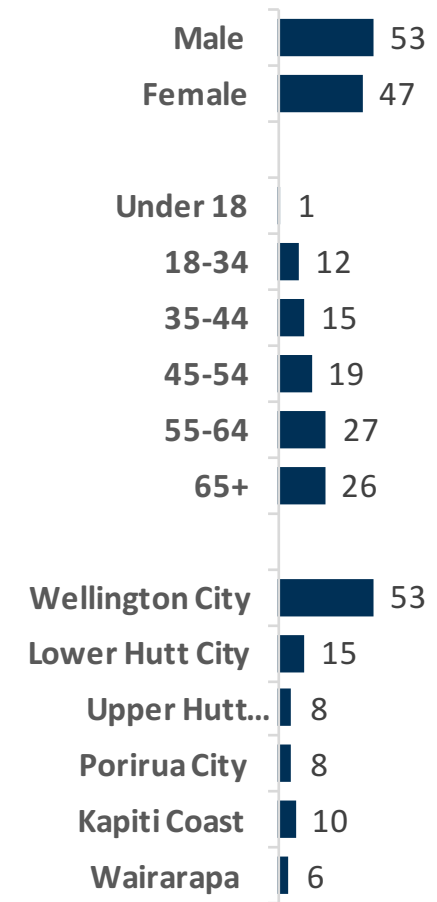
LGWM online (n=2503)



WCC panel (n=643)



GWRC panel (n=631)



About UMR

UMR is a full-service market research and evaluation company working across social research, corporate reputation, issue management, policy, and rural issues. We employ a full range of qualitative and quantitative methods, including provision of an extensive online offering. Our team of expert researchers combine extensive experience with a deep understanding of the public mindset.

UMR was founded in 1987. Since then we have worked with, and provided advice to, a hugely diverse range of clients from both the private and public sectors. UMR conducts a wide range of qualitative and quantitative projects, from small to very large. We aim to bring clarity to research findings and pride ourselves in providing truly actionable insights.

We have deliberately set out to differentiate ourselves from much of the market research industry by employing staff with a broad range of professional backgrounds. While all have expertise in research, this breadth of experience helps bring a pragmatic focus to projects and adds value to research findings. Client-side experience also ensures a thorough understanding of how research outputs are used in the real world.

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