

TRA

Encouraging behaviour change between motorists and cyclists

SHARE THE ROAD | NZTA | October 2017

The opportunity at hand

The Transport Agency's cycling programme is a critical element in ensuring an integrated transport system

Core to the agency's overall objectives are to make cycling safer and more attractive – with the goals of:

1. Increasing the number of people choosing to travel by bicycle

2. Improving the safety of those who travel by bicycle

To do this, NZTA are developing a holistic investment plan including infrastructure development, community engagement programmes and public education to encourage cycling as a mode of transport.

Further to this, there is currently a petition being considered by cabinet that will make it legal for children (and their accompanied adult) to cycle on footpaths.

To guide the development of a holistic cycling growth strategy, NZTA need to base decisions from a intricate understanding of road users' behaviour and perceptions.

This document has been developed to form a detailed understanding of behaviour on the road, motorists' perceptions and attitudes when it comes to cycling and sharing the road.



The specific objectives include

- **Motorists' general perceptions of cyclists**
- **Perceptions of safe behaviour and best practice**
- **Attitudes towards sharing the road**
- **Footpath cycling behaviour and attitudes**

All to guide a behaviour change programme for NZTA

Two core components to the methodology

Co-creation sessions

Co-creation sessions – to understand the subtle differences in perceptions between drivers and cyclists. We created an environment where participants could be open and honest, challenge perspectives and really get behind what change is required around sharing the road.

- 2 sessions of 12 motorists/cyclists over an extended timeframe
- Auckland and Christchurch

Quantitative survey

A nationally representative quantitative survey – developed to gain hard metrics on some key aspects of behaviour, perceptions and attitudes:

- N=1,507 motorists, based on region, age and gender
- 15-minute questionnaire
- Includes a robust sample of cyclists and parents with children under the age of 12

This document

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Sharing
the road in
context

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and behaviour
on the road

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The motorist-
cyclist
relationship

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Bringing it all
together


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Sharing the road in context

1





**There are common
transport beliefs that are
shared by both motorists
and cyclists**

Firstly, there is definitely a sense of positive momentum in cycling

Cycling is a good thing

Both motorists and cyclists are aware of the benefits of cycling including the personal benefits (health and fitness) and the collective benefits (less traffic and less emissions).

Cycling will continue to grow

And motorists and cyclists agree that cycling will continue to grow in NZ, in particular, the amount of e-bikes¹.

This is evidenced through recent work conducted in Auckland where the cyclist population has doubled in 2 years.



“I like the idea of my children being able to cycle around Christchurch one day.”

However, with growth comes a tension around infrastructure and congestion

Current transport infrastructure

The current system is felt to be lacking and piecemeal - for both roads and cycle lanes, however, it is improving slowly. The current system makes it difficult for drivers and cyclists to behave in the best way possible.

The roads will continue to get busier

People are noticing more road users and growing cities (particularly in Auckland). With this comes more traffic, more pressure on roads and also an increase in instances of poor driving.



“Our roads are really piecemeal - we haven’t got it 100% right for cars or cyclists. It doesn’t feel integrated.”

The tension is manifesting itself in a feeling of an unsafe environment and bad behaviour

“Kiwis are pretty terrible drivers. No one indicates.”

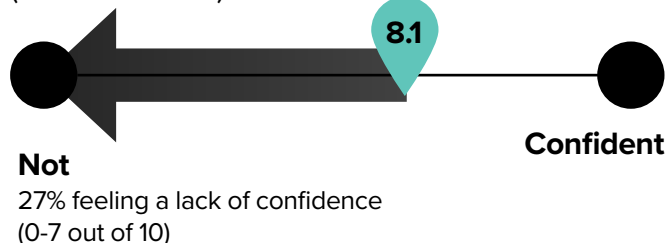
Kiwis are bad drivers

There is a common understanding that of all the great things kiwis are known for, our driving is not one of them

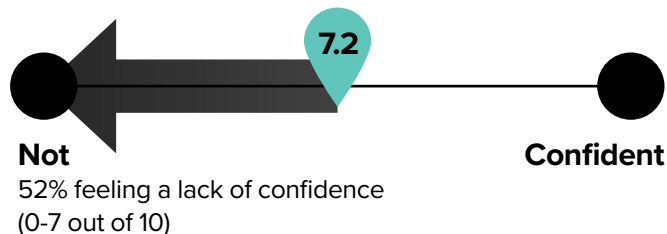
Feeling unsafe on the road

Across both motorists and cyclists, there is a level of anxiety around safety on our roads

Motorists confidence on the road
(mean out of 10)



Cyclists confidence on the road



Q. How confident are you as a motorist?
Q. How confident are you as a cyclist?
Base: n=1,507 (motorists), n=610 (cyclist)



When it comes to New Zealand roads, everybody wants a sense of flow

Everyone realises things can't go on the way they are – and we all need to make a change to enable flow on our roads.

Only through a shared purpose will we truly see behaviour change.

This shared purpose is ultimately to help us get where we are going efficiently, safely, and enjoyably

So who is on the road and what are they doing?

Cycling has made a comeback. It is no longer a niche recreation activity but a viable mode of transport for many

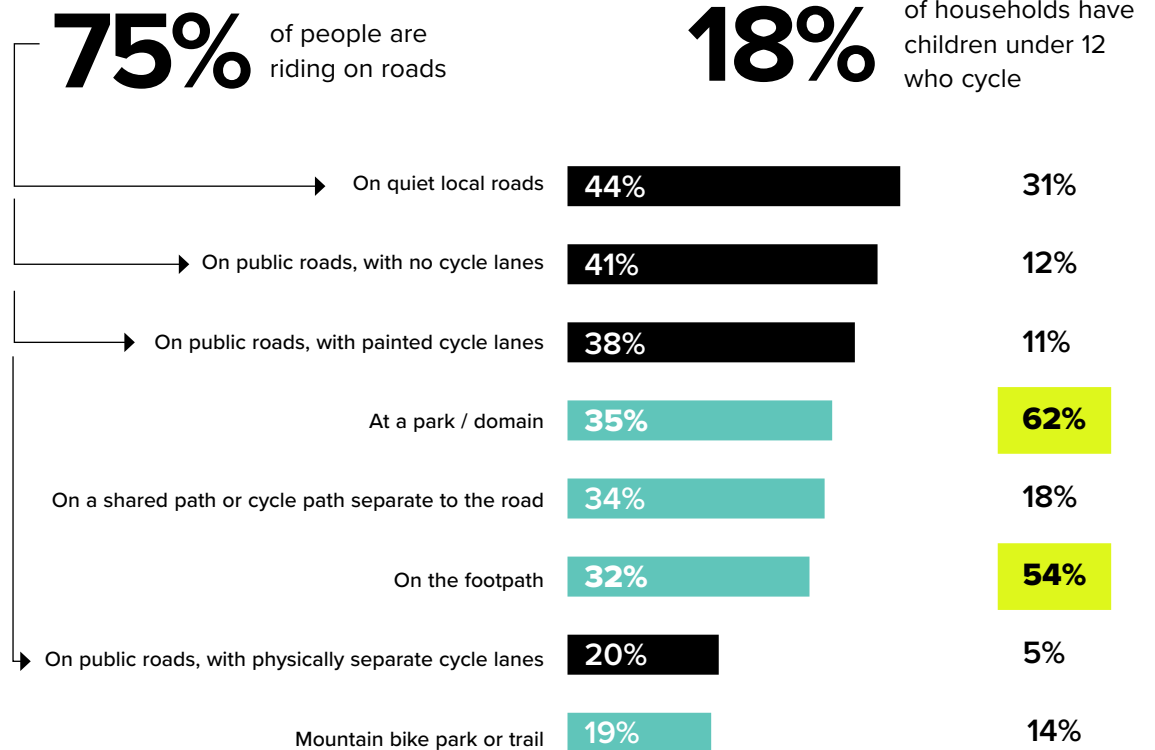
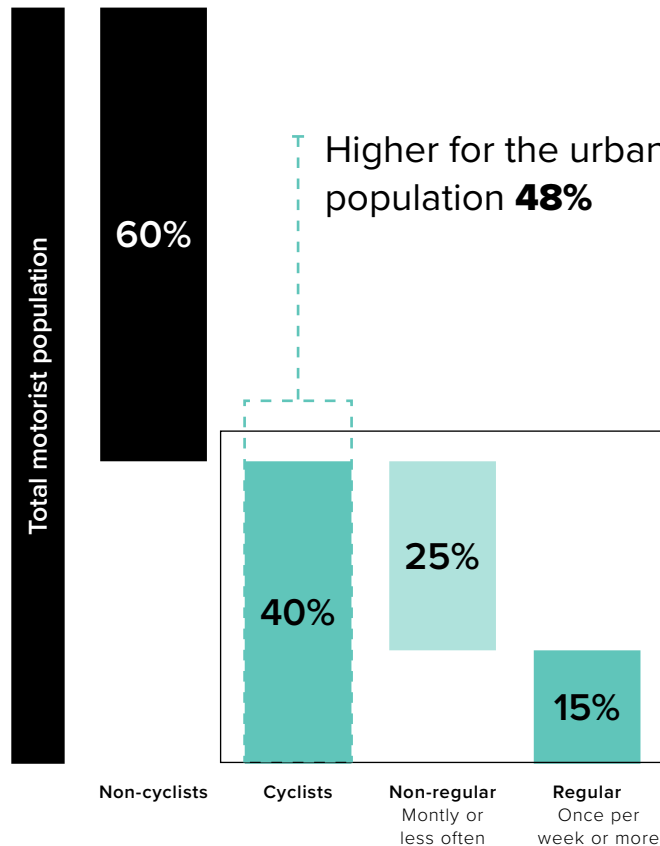
Roads are being used regularly by the majority of cyclists and for many, these are without the use of cycle lanes.

CYCLING PENETRATION

(New Zealand motorist population)

MAIN CYCLING OCCASIONS (ALL CYCLISTS)

CHILDREN < 12



Q. On average, how often do you do the following? | Q. Where do you cycle? | Base: n=1,507 (motorists), n=610 (cyclist), n=278 (with children under 12)

And the majority of cyclists identify as leisure or casual cyclists, not lycra clad racers

SELF DEFINED CYCLIST TYPE (ALL CYCLISTS)



1%

Group road cyclist



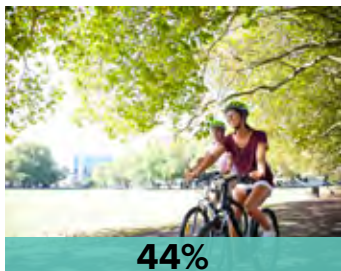
5%

Road cyclist



5%

Faster commuter



44%

Leisure cyclist



22%

Casual cyclist



9%

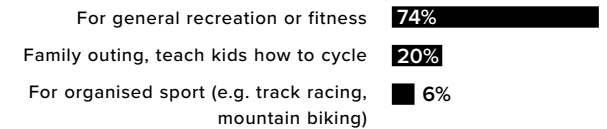
Regular commuter



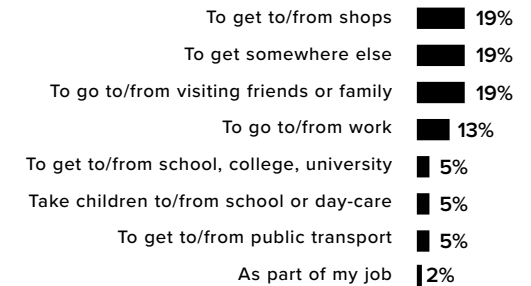
13%

Family group

MAIN CYCLING OCCASIONS (CYCLISTS)



NETT (ALL VEHICLE REPLACEMENT TRIPS)



66% of the cyclist population associate themselves most closely with a leisure or casual cyclist

Q. Below are some images of cyclists, which of the following would best relate to the type of cyclist you are?

Q. What occasions do you cycle?

Base: n=610 (cyclist)

Despite very few cyclists associating themselves as *group road* or *fast* cyclists – motorists report observing these types most frequently on the road

This makes sense when you consider that road and commuter cyclists cycle most frequently.

However, while road and regular commuter cyclists are on the road more often than other cyclists, road cyclists disproportionately dominate motorist perceptions of who is on the road.

This may be because seeing road cyclists is more highly emotionally-charged event.



	Cyclists self reported association	Cyclists self reported frequency	Who motorists are seeing on the road ²
Group road cyclist	1%	47%	38%
Road cyclist	5%	62%	55%
Fast commuter	5%	54%	29%
Regular commuter	9%	69%	38%
Casual cyclist	22%	31%	29%
Leisure cyclist	44%	27%	35%
Family group cyclist	13%	41%	16%

Despite there being more regular commuters (9%) than road cyclists (5%), and the fact that regular commuters also ride more than road cyclists (69% vs. 62%), more than half of motorists (55%) say they see road cyclists a lot or all the time on the road, compared to only 38% for regular commuters.

2: I see this cyclist a lot or all the time
 Q. Below are some images of cyclists, which of the following would best relate to the type of cyclist you are?
 Q. Thinking as a motorist, how often do you see these different types of cyclists?
 Q. How often are you doing each of the following (cycling)?
 Base: n=1,507 (all motorists) n=610 (cyclist)



IMPLICATION

Cycling is becoming mainstream, however the presence of road and commuter cyclists dominates.

Despite a shift away from the road and commuter cyclist in recent years – this behaviour has not been normalised yet.

Strong perceptions of the typical cyclist still exists and conjures up specific perceptions and imagery of a cyclist.

Perceptions and behaviour on the road

2



We know that for both motorists and cyclists, cycling on the road often causes fear and frustration

With the resurgence of cycling being relatively recent and not yet a normalised occurrence on the road, many drivers enter a state of heightened emotion as soon as they see a cyclist.

Fear

Causing injury or damage to person or vehicle

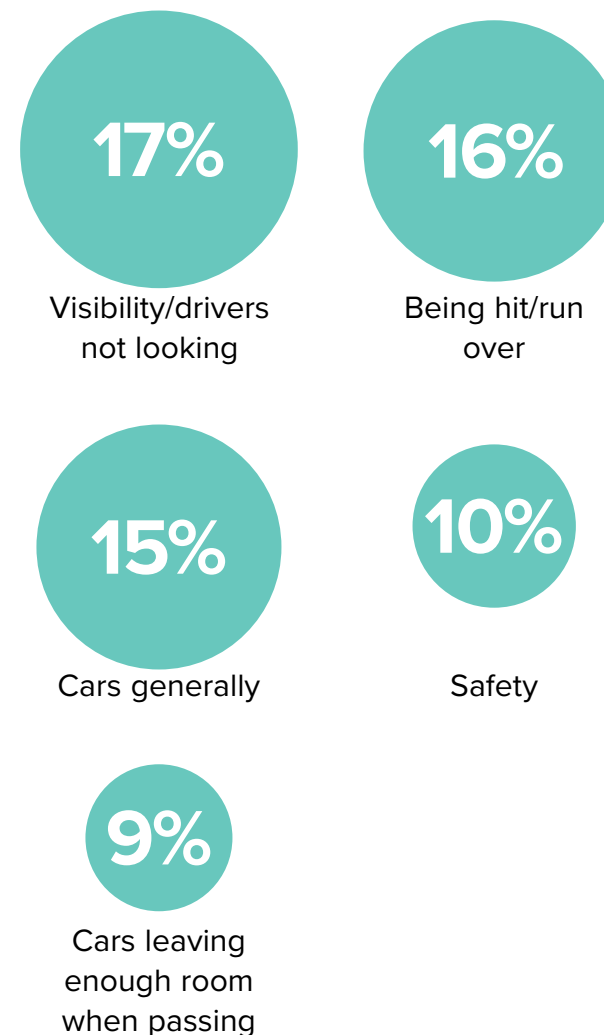
Death

Frustration & impatience

Being late – Going slow to accommodate cyclists

Going slow– Simply not moving forward

TOP 5 CYCLIST CONCERNS WITH BEING ON THE ROAD



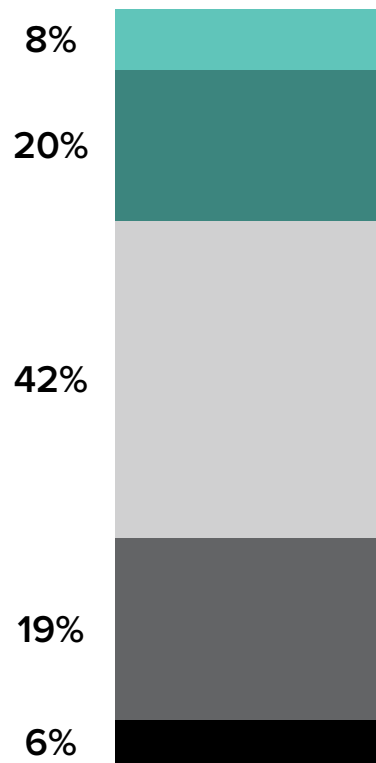
Q. As a cyclist, what are your main concerns when being on the road?

Base: n=610 (cyclist)

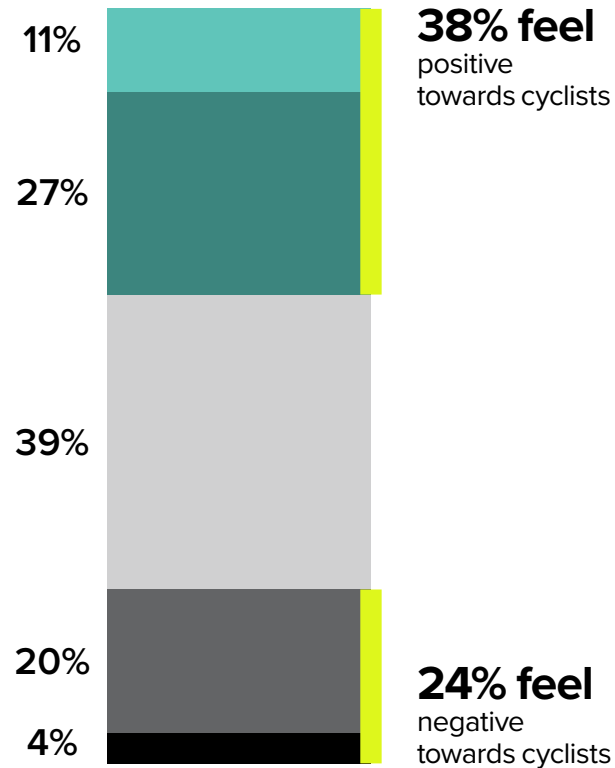
Motorists generally feel neutral to positive towards cyclists



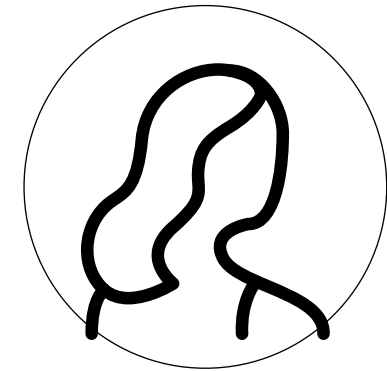
Motorists ONLY group



Total New Zealand perceptions towards cyclists (all motorists)



Motorists know of cycling’s benefits and find many cyclists relatable and admirable. They are also nostalgic for the good old days when they could cycle freely and safely as children.



“You go girl!”

Active Alison

Retired homemaker, lives with her husband. Likes cycling, walking, gardening, golf. Loyal, traditional, friendly, passive. When she cycles, she’s enjoying life and loves the freedom. A bit styley.

Example positive persona

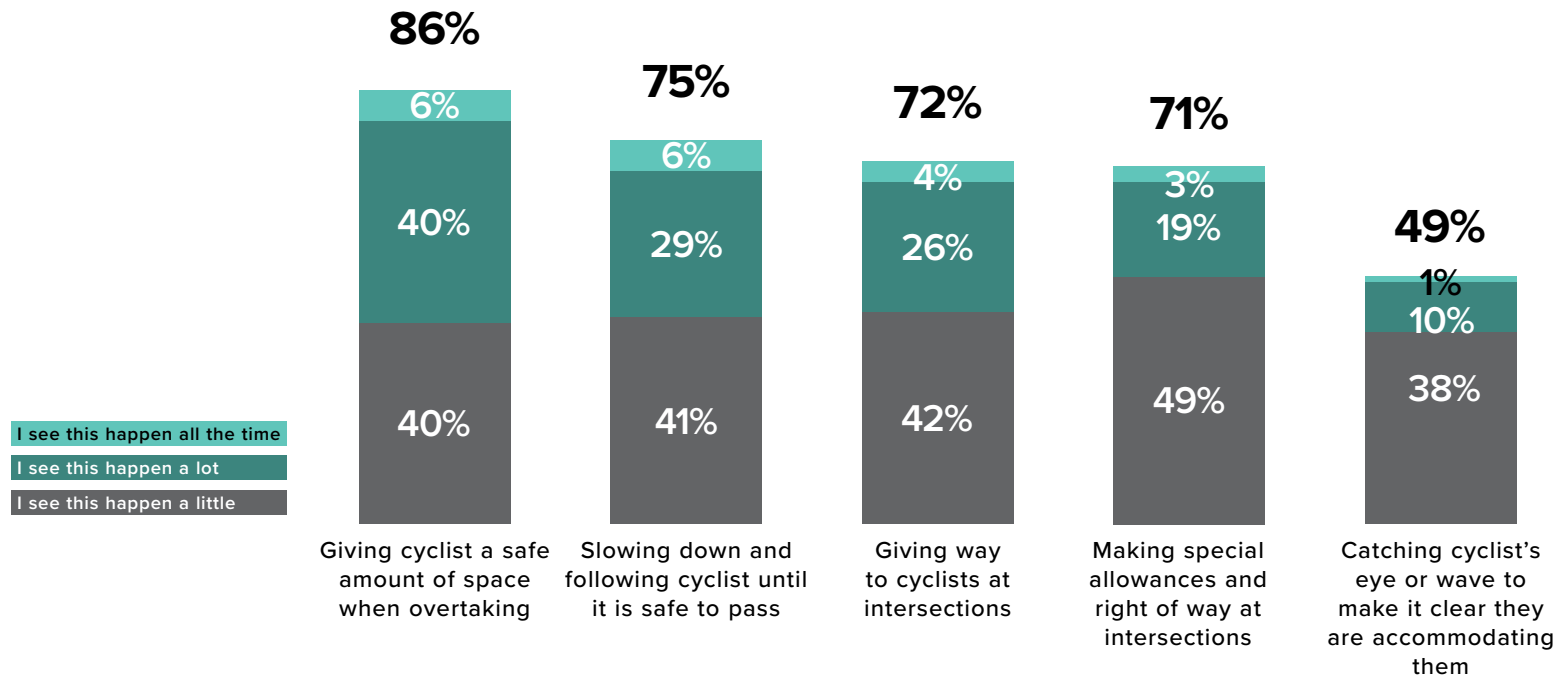
Q. Please select which best represents how you feel about cyclists?

Base: n=1,507 (all motorists), n=897 (motorists only)

There are also some very positive behaviours being observed towards cyclists

Motorists are observing positive behaviour on our roads, especially when it comes to allowing for space between driver and cyclists. And importantly, cyclists are generally seeing the same positive behaviour.

POSITIVE DRIVER BEHAVIOURS OBSERVED



Cyclists ONLY group
(Total see it happen)

86%

77%

78%

76%

61%

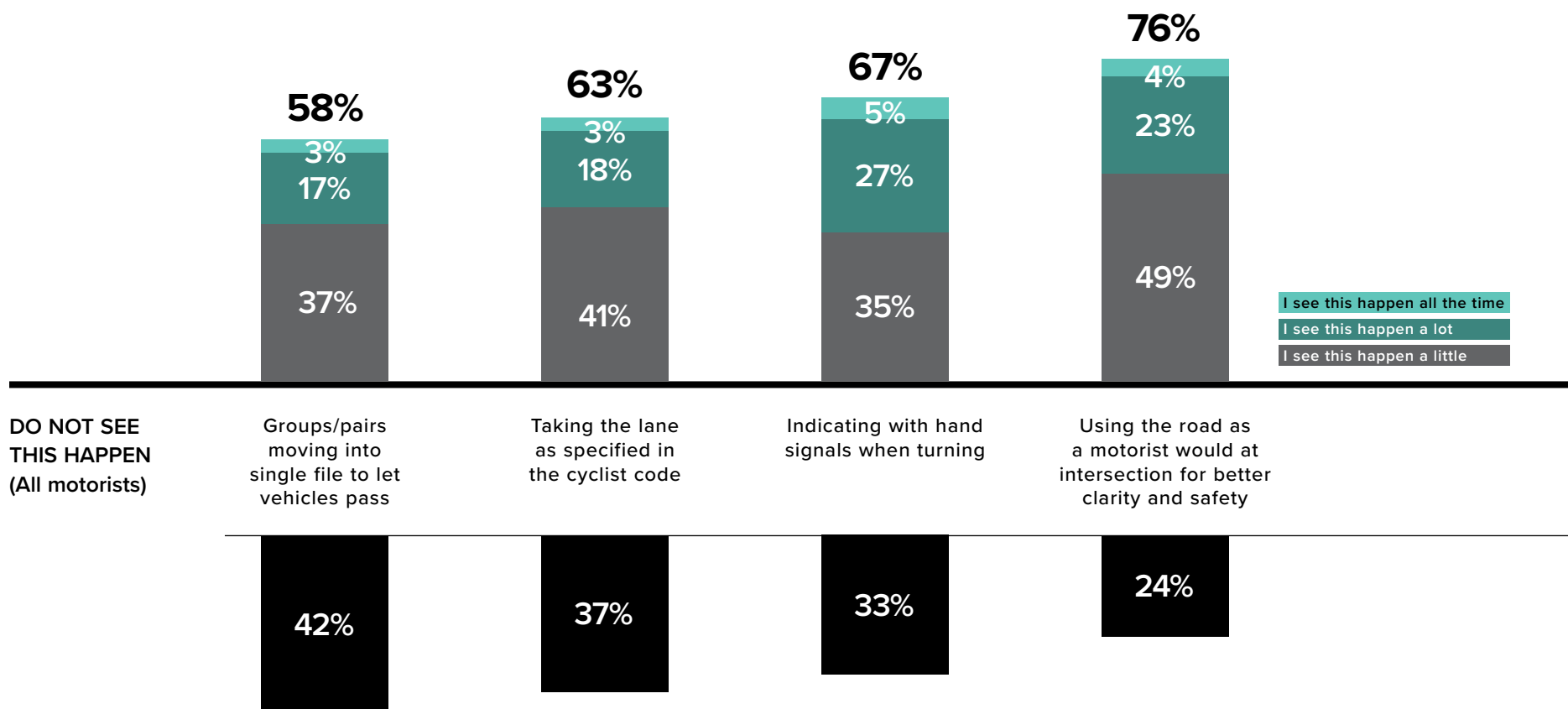
Q. How often do you see the following behaviour on the road from motorists?

Base: n=1,507 (motorists), n=610 (cyclists)

And cyclists are also demonstrating positive behaviour although inconsistency exists

We are seeing some positive cyclist behaviour already, however more inconsistency exists, especially around considerate behaviour, rules and communication.

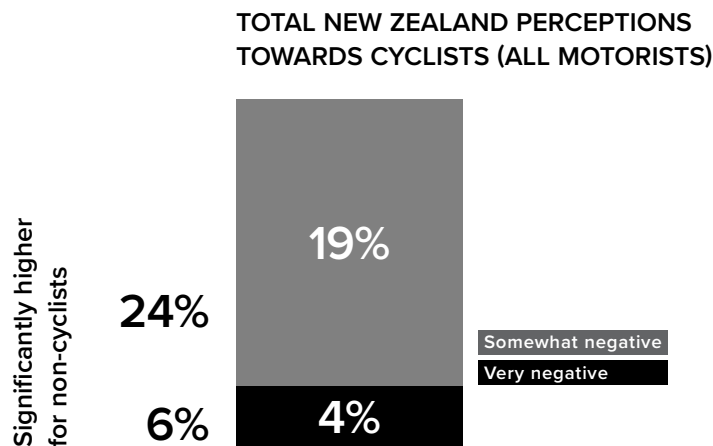
POSITIVE CYCLIST BEHAVIOURS OBSERVED (ALL MOTORISTS)



Q. How often do you see the following behaviour on the road from cyclists?
Base: n=1,507 (motorists)

This inconsistency is leading to some resentment towards cyclists

Almost a quarter of our motorist population feel negative towards cyclists in general.



“Cyclists can be really unpredictable, they’re all over the show.”

“It should be the same rules for the same people. You can’t get demerit points on a bike.”

Q. Please select which best represents how you feel about cyclists?
Base: n=1,507 (motorists), n=897 (motorists only)

This resentment can compound the fear and frustration motorists feel when sharing the road with cyclists

- Cyclists are getting special treatment “*Precious cyclists*”
- Cycle infrastructure making roads narrower for cars
- Cyclists being an inconvenience
- Drivers feel like they are making all the sacrifice
- “It’s not fair.”

“The duty of care lies with the car driver. We’re bigger and can cause more harm. Just like the duty of care on a shared path is with the cyclist.”

Negativity towards cyclists is driven by the specialist lycra clad cyclist, particularly when they move in “packs”

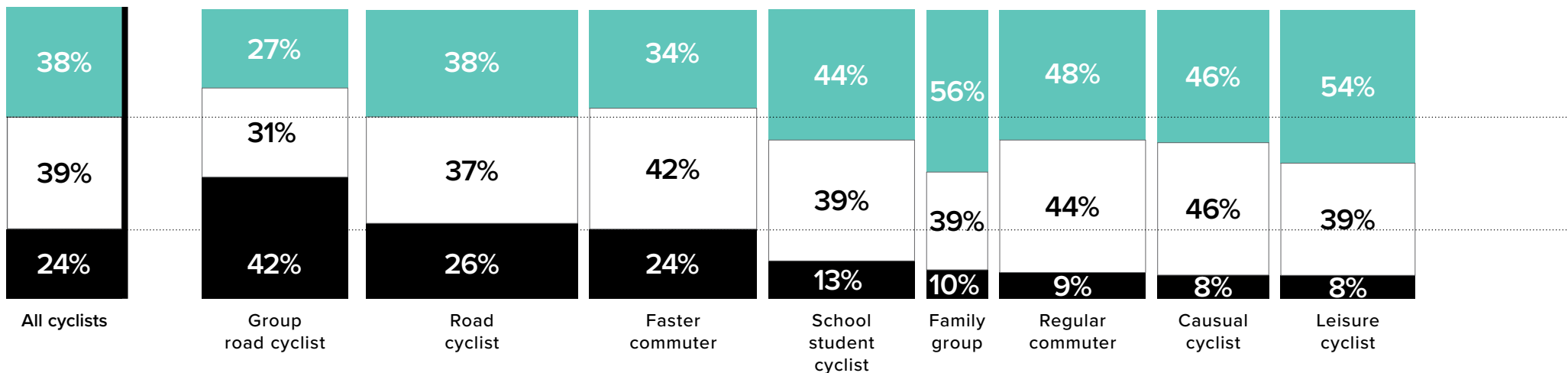
There are very different perceptions towards different types of cyclists, and it is clear the negative perceptions are driven by only a small group of the cyclist population.

“They’re not considerate, they’ll smack your bonnet.”

“King of the road.”

“They know who will get done if something goes wrong.”

PERCEPTIONS TOWARDS CERTAIN TYPES OF CYCLISTS (ALL MOTORISTS)



Total positives Neutral Total negative

Q. On the scale below, please select which best represents how you feel about each of the following cyclists?

Base: n=1,507 (motorists)

This sub-set of riders is most likely to arouse negative emotion

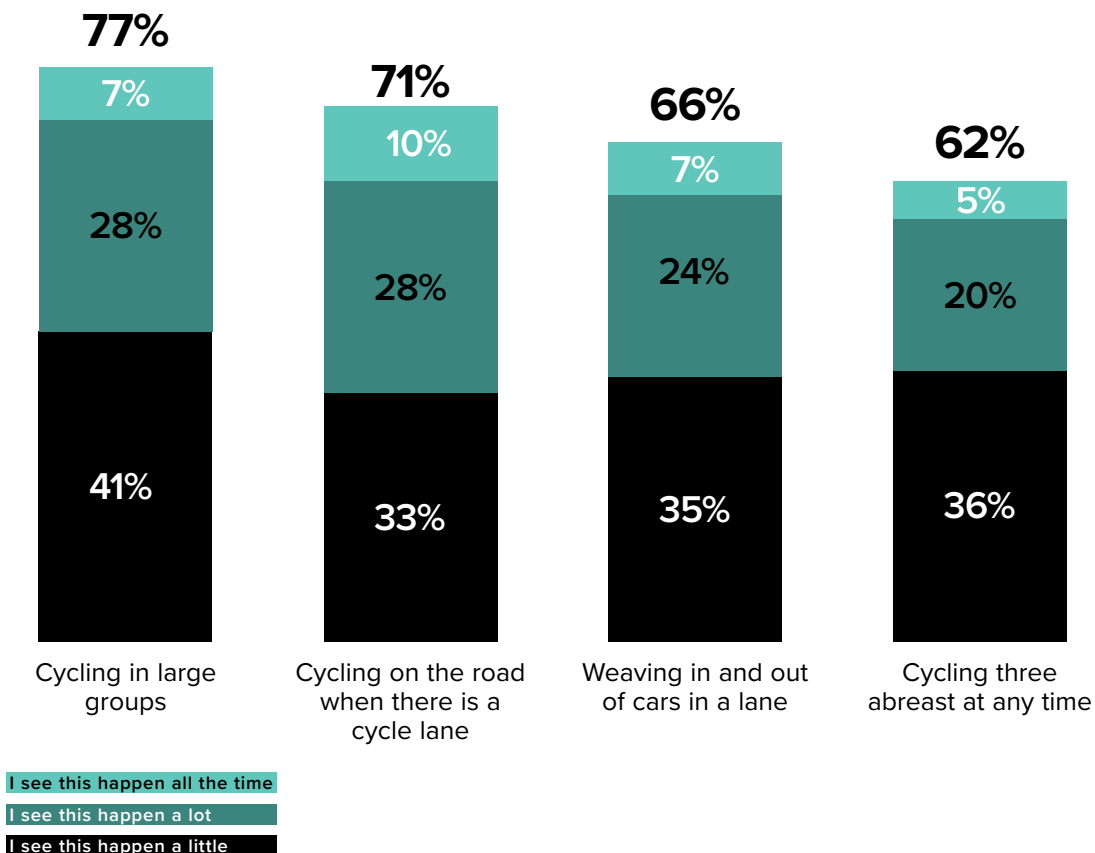
Lycra-clad figures are most strongly associated with cycling that is competitive, fast, and arrogant. There is no other role that people can connect them to so they are almost dehumanised.

Much of the negativity around these cyclists is created by the fact that they are often seen riding in “entitled” packs or chatting nonchalantly in pairs, which block roads. This negativity can be projected on to solo road riders (and indeed all cyclists). Use of the word “packs” itself connotes predatory, hunter behaviour.

While a person cycling in more everyday clothing will elicit anger through inconsiderate or dangerous behaviour, a lycra-clad person can raise hackles simply through how they are dressed.

Caught in the wrong moment, a lycra-clad cyclist can be a red flag to drivers with little emotional restraint, leading to anti-social behaviour.

NEGATIVE CYCLIST BEHAVIOURS OBSERVED

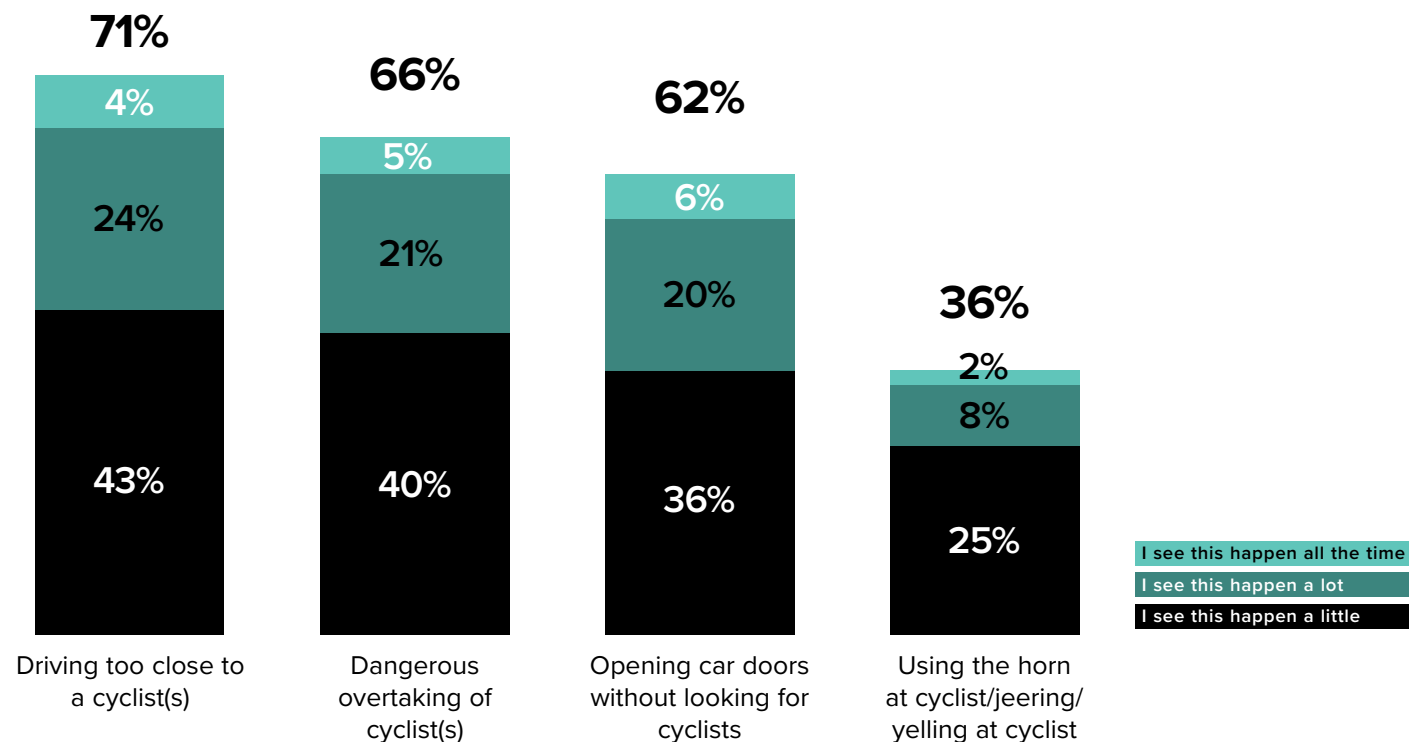


Q. How often do you see the following behaviour on the road from cyclists?
Base: n=1,507 (motorists)

And this negative emotion towards cyclists is causing mixed driving behaviours observed on our roads

Negative behaviours by motorists towards cyclists are observed regularly on our roads. These observations fuel anxiety and safety concerns, and ultimately contribute to the barrier of people getting out of their cars and cycling on the road.

NEGATIVE DRIVER BEHAVIOURS OBSERVED



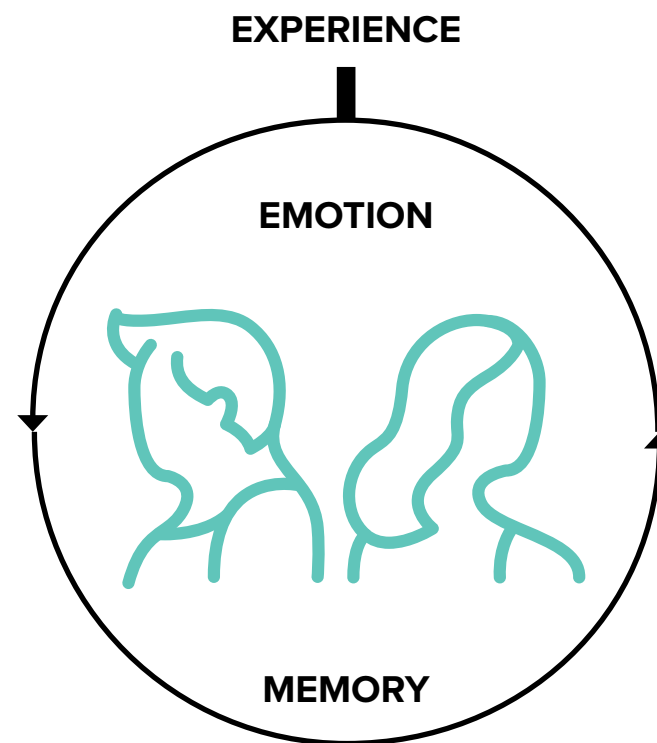
Q. How often do you see the following behaviour on the road from motorists?
 Base: n=1,507 (motorists)

IMPLICATION

Not all cyclists are an out-group but subset of lycra-clad cyclists is driving anti-social behaviour

Generally, feelings towards cyclists are positive. However, there is a very specific sub-group which provokes negative feelings. And despite this group only representing 11% of cyclists, they elicit strong emotional responses and therefore overwhelmingly influence perceptions of cycling and cyclists in general.

The resulting anti-social behaviour being observed on our roads reinforces the feelings of anxiety and concern by many motorists and cyclists.



IMPLICATION

Humanising road cyclists will be important. However, it is easier to change the behaviour of the in-group, rather than an out-group

Research suggest that rather than trying to normalise an out-group, it is easier to change the behaviour of the “in-group” by telling them how to behave, and that attitude follows behaviour.

This is an important component of legitimising cycling as a normal and valid part of traffic.

So how do we drive positive behaviour and ultimately influence attitudes?



Changing behaviour

3



A framework to drive behaviour change

In our experience, behaviour change – whether it is to change behaviour or reinforce current or new behaviour – should take a holistic approach incorporating individual, social, cultural and environmental elements.

This behaviour change model helps us determine the levers and pathways most likely to prove successful in influencing our desired behaviour.

Environmental

Ever improving cycling and shared road infrastructure

Cultural

Driver culture: Action and belief that kiwis are good drivers

Social

Create social norm, promote trust and set standards for fairness through clarity of rules and model behaviour

Individual

Influence how people react to emotional situations through social norms and a positive driver mindset

Motorist and cyclist anxiety on the roads is exacerbated by three key tensions

My Road

vs.

Our Road

NZ road culture is dominated by a driver mindset.

Clarity

vs.

Confusion

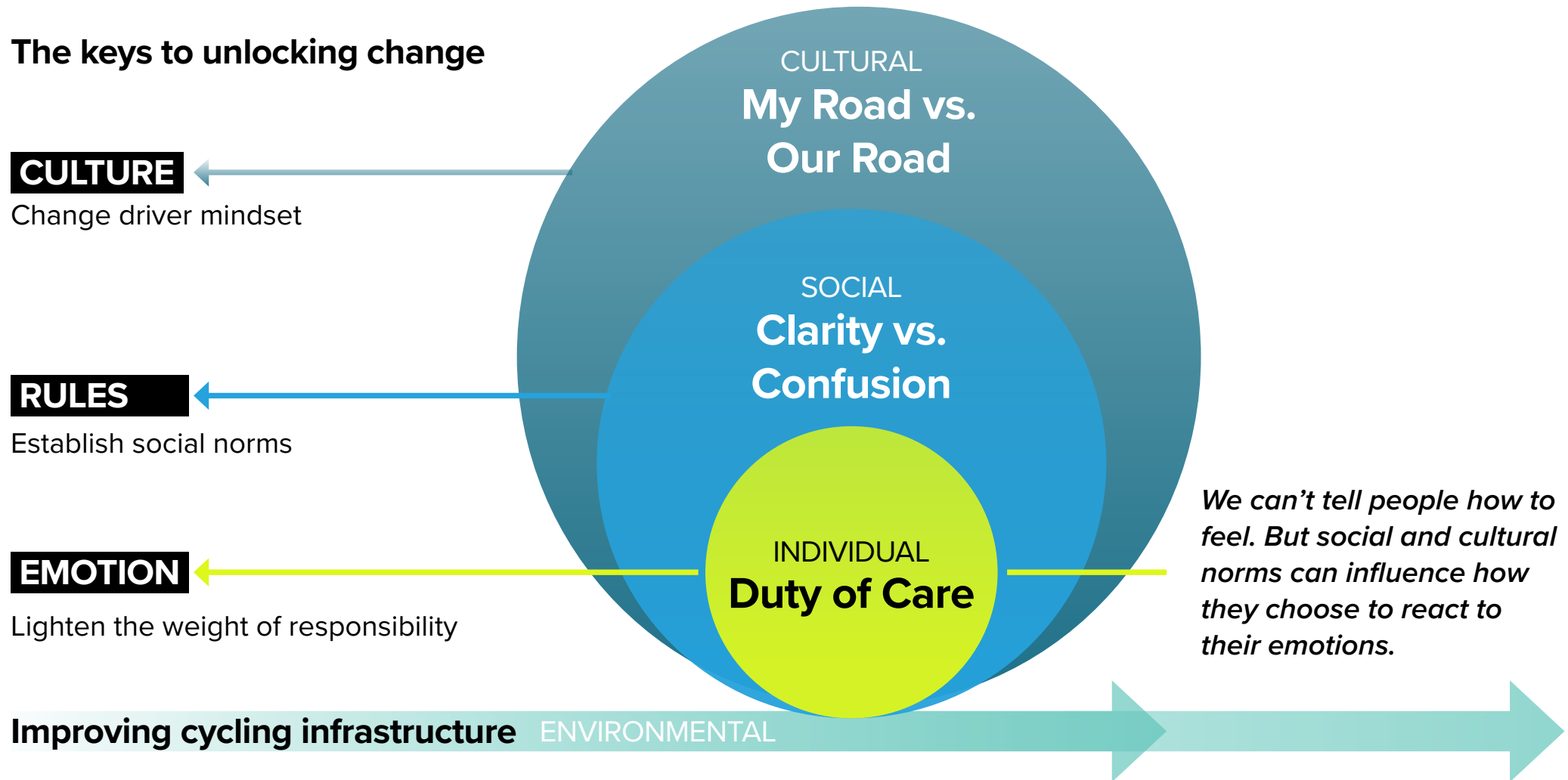
What are the rules?
What am I supposed to do?
What is the other supposed to do?
Can I trust them to do that?

Duty of Care

One party always has more power and duty of care, whether they want it or not.

Addressing these tensions is key to creating positive behaviour change and improving on the road relationships

The keys to unlocking change



EMOTION

Driving mixes power and emotion

NZ's driving culture is "bad"

New Zealand drivers describe the country's driver culture as "bad" and "competitive." They admit they themselves are "impatient" and "self-absorbed."

They note that traffic growth leads to more stress and time pressure while driving.

Driving can very easily become emotional

On top of stressful roads, and personal issues, the fear or frustration they feel when a cyclist enters the picture can lead to anti-social behaviour.

64% of motorists feel they are a lot less considerate when they are stressed and under pressure.

Driving promotes anti-social behaviour

Protected, feeling anonymous, and, being in a powerful position (by virtue of being in a car), driving gives a sense of permission to behave in ways that in other social contexts would be unacceptable.

Q. Thinking about other motorists on the road, how considerate do you think they are towards other road users when they are stressed or under pressure?

Base: n=1,507 (motorists)

EMOTION

Make us feel better about ourselves

There is a sense of unequal responsibility on our roads and footpaths

Because of the power dynamic at play, motorists feeling that the duty of care lies with them.

In addition to the fear and frustration they already feel, a responsibility has been thrust on them that they have not asked for, leading to further resentment.

But we can lighten this responsibility by providing clarity about how every person, in every mode of transport, can play their role in creating safe roads.

'Share the Road' also needs to feel like 'share the responsibility.'

Both drivers and cyclists need to be exhorted to be partners in keeping the road safe by acting responsibly.

On footpaths, it is felt that the duty of care lies with the cyclist.

However, the pedestrian needs to help the cyclist out by acting responsibly, too.

Core to driving emotion into the decision making process on the road is reinforcing good behaviour.

Being seen as a good driver is powerful in engraining desired behaviours.

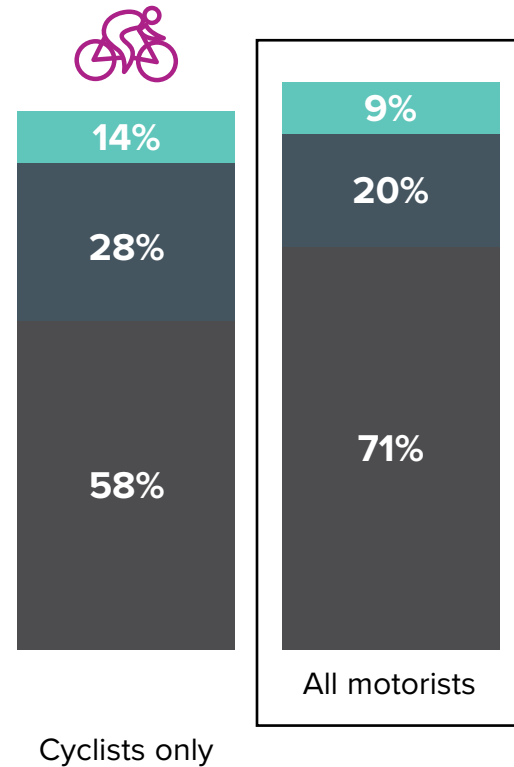
RULES

Turn confusion into clarity

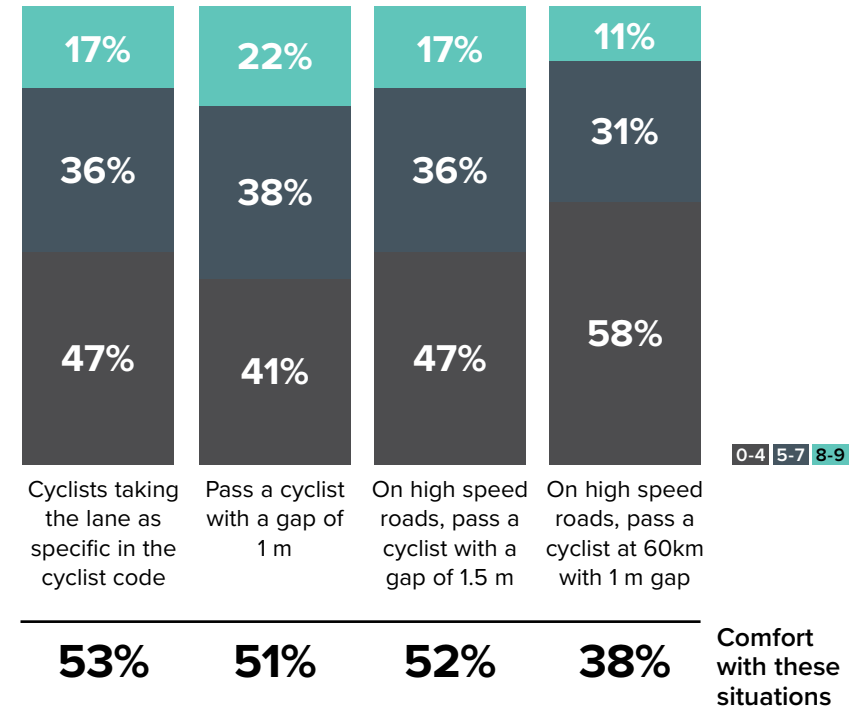
Currently both motorist and cyclists are unaware of the code in general, and for most, there is limited familiarity with the specific rules. This is creating uncertainty and a lack of comfort with common scenarios.

“I think it is just dangerous to have cyclists near cars. It makes me uncomfortable to be around them. I know if I hit them, even when I am driving the safest I can, then I am in the wrong”

FAMILIARITY WITH THE CYCLING ROAD CODE



Familiarity with the cycling road code (All motorists)



Q. What is your level of comfort in these situations?
 Q. How familiar are you with the NZ road code.
 Q. How familiar do you think motorists are with the following codes?
 Base:1507 (All motorists); 610 (cyclists only)

RULES

Turn confusion into clarity

Knowing the correct or model behaviour in cycling situations creates social norms

Being unified on the expected behaviour *creates social norms and sets expectations of what's fair*

New Zealanders like rules and fairness.

Understanding the types of behaviour that are acceptable and unacceptable will be reinforced by those around them.

Not knowing what's acceptable permits people to behave how they want and/or copy other people do, for better or worse.

Being unified makes roads safer by *enabling anticipation of the other's behaviour*

Being unclear on rules leads to an inability to anticipate or predict another's behaviour (leading to anxiety).

It improves road relationships by creating trust between motorists and cyclists.

Increasing *empathy for cyclists contributes to clarity*

A complementary approach to promoting clarity is facilitating empathy. Resentment towards cyclists lowers when drivers understand ***why*** cyclists behave in certain ways.

From past experience, we must be careful that this approach doesn't exacerbate perceptions of cycling being unsafe.

CULTURE

My road vs. Our road mindset

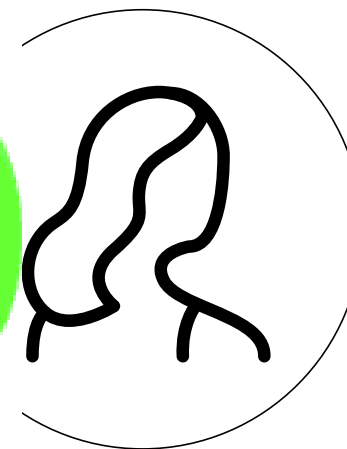
Changing the driver mentality in New Zealand is vital to creating a more harmonious road culture

We know that we need to flatten the driver-dominated hierarchy on the roads and create roads where cycles are equal and fundamental parts of the transport equation.

Influencing individual drivers means, on a social level, creating social norms.

On a cultural level, we need to promote a friendlier driving culture and foster a more collective relationship between all on the roads and footpaths.

This suggests promoting a vision of what we want New Zealand roads to be like and, accordingly, providing guidance on what the “right” behaviour is.



“Being a tidy kiwi makes me feel grand. Also makes me feel extraordinary.”

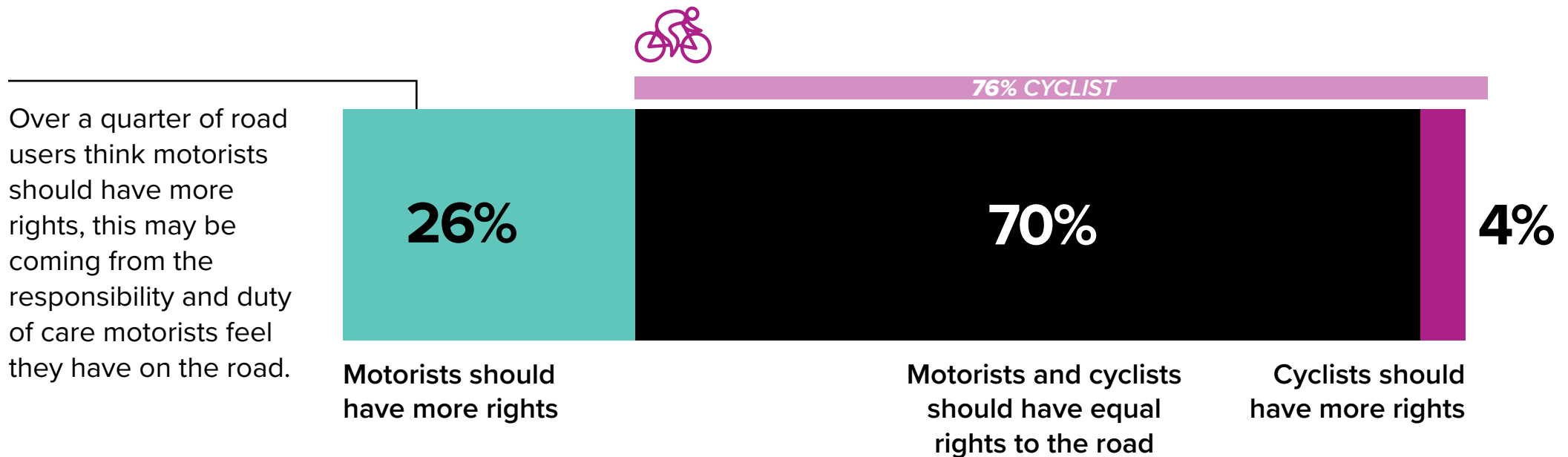
10 year old girl, Te Kauwhata.
www.beatidykiwi.nz

CULTURE

My road vs. Our Road mindset

There is a desire to 'share the road' and that we all should have equal rights so we are not starting from scratch.

PERCEPTIONS TOWARDS RIGHTS ON THE ROAD (ALL MOTORISTS)



Q. From a road user point of view, who do you feel should have more rights when it comes to sharing the road? Base: 1507 all motorists

IMPLICATION

The keys to unlocking change

Change driver mindset and foster a collective, friendlier driver and cyclist mindset.

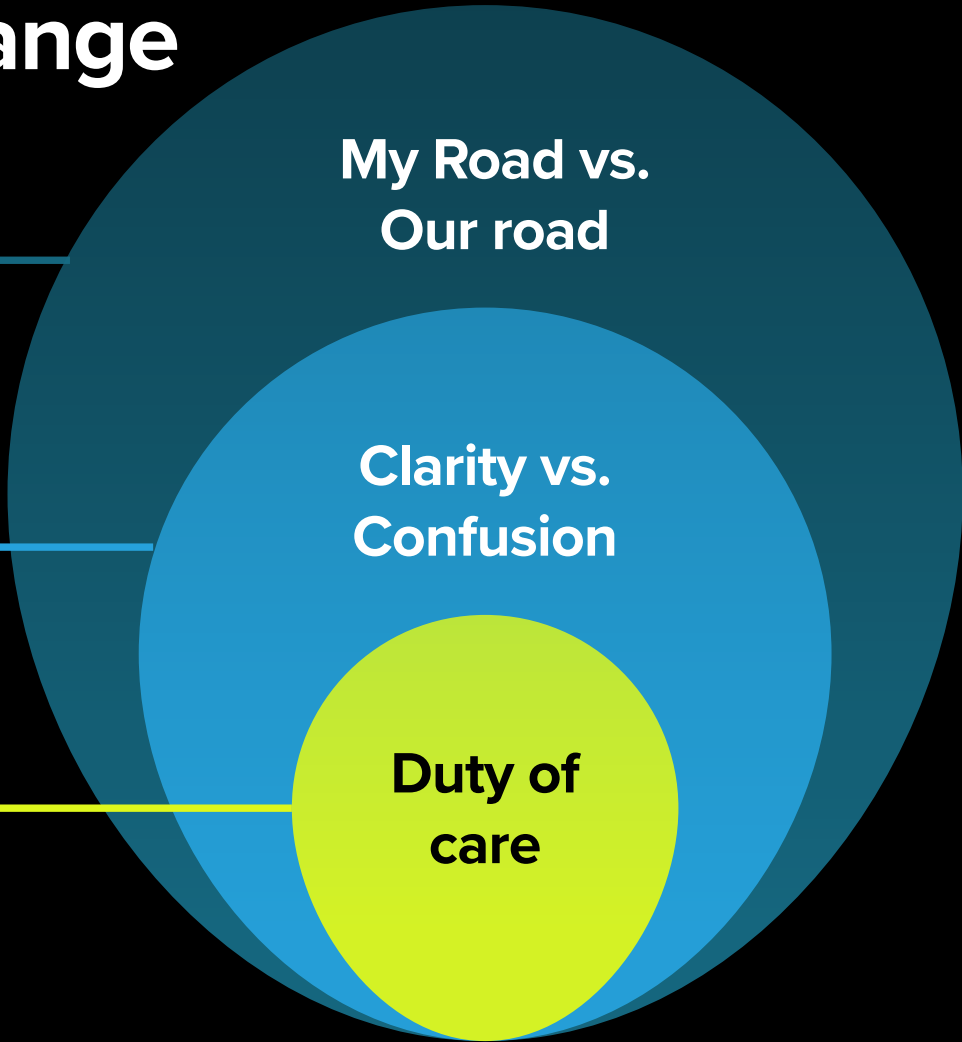
CULTURE

Creating clarity around rules helps to anticipate behaviour, reducing anxiety, and to establish social norms and expectations. Increasing empathy contributes to clarity.

RULES

Make us feel better about ourselves. We are partners on the road, and our individual positive behaviour is having a positive impact on the road and towards other road users.

EMOTION



So what is the **big idea**
we need to ladder these
specific elements up to?

IMPLICATION

Everybody wants flow. To travel **freely**, sharing a common goal of **progress** and **equilibrium**.

This idea is powerful at all levels of the behaviour change model:

- Culturally, a body of people who are **equal, unified, interdependent and synergetic**
- Socially, an environment of **trust based on mutual anticipation and expectation**
- Individually, a feeling of **freedom, control and momentum**

It also speaks very clearly towards achievable aspiration - i.e. we all want to live a better life, be on safer roads and together we are going to achieve this.

To reach flow, we need to use a coordinated approach building on the individual, social, cultural and environmental aspects influencing our behaviour.

Footpath cycling

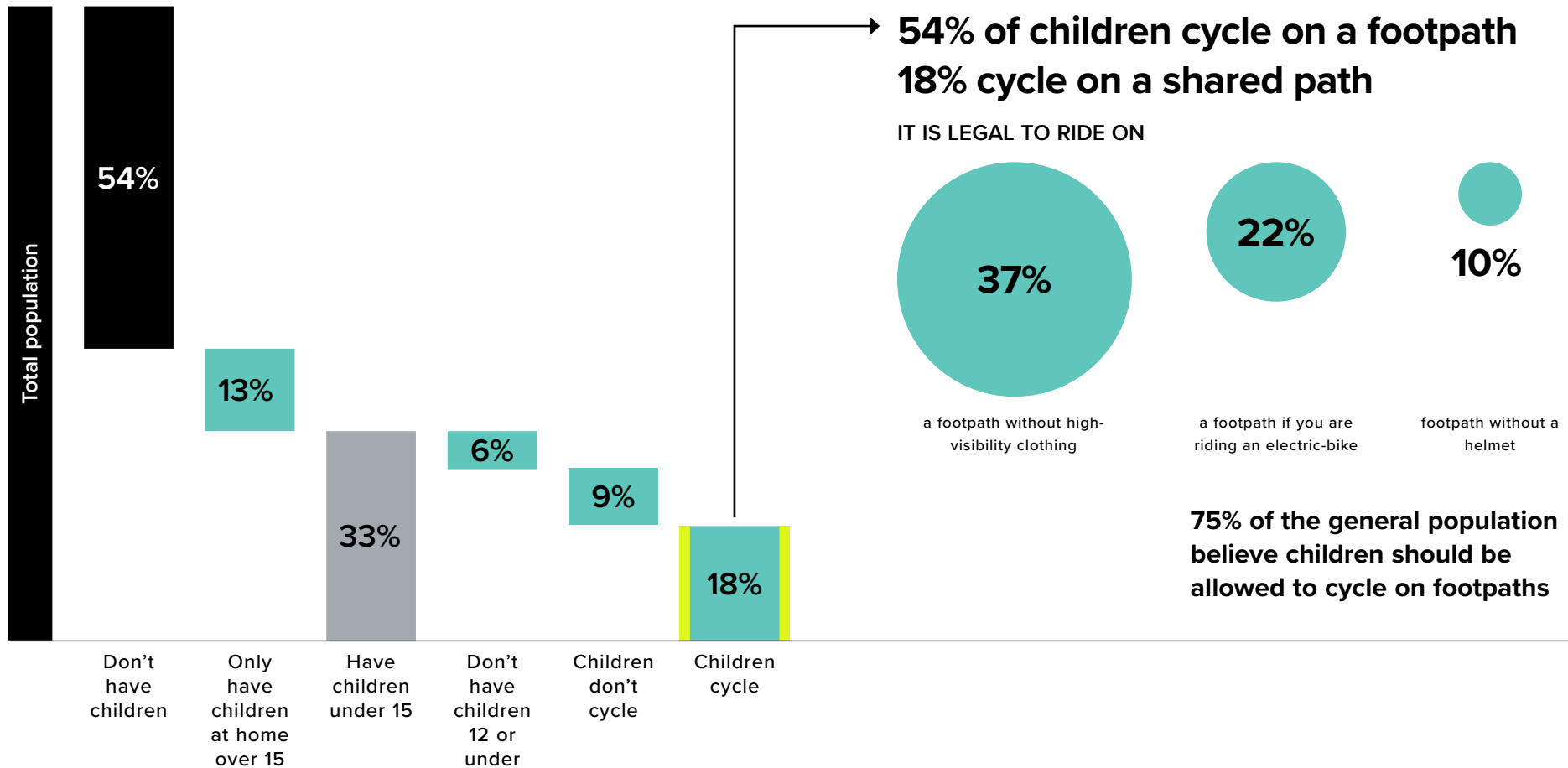
4



Around 18% of the adult population have children who cycle

Aside from a park or domain, children cycling on a footpath is the second most frequent location for cycling. And there is confusion around the legality of cycling on the footpath.

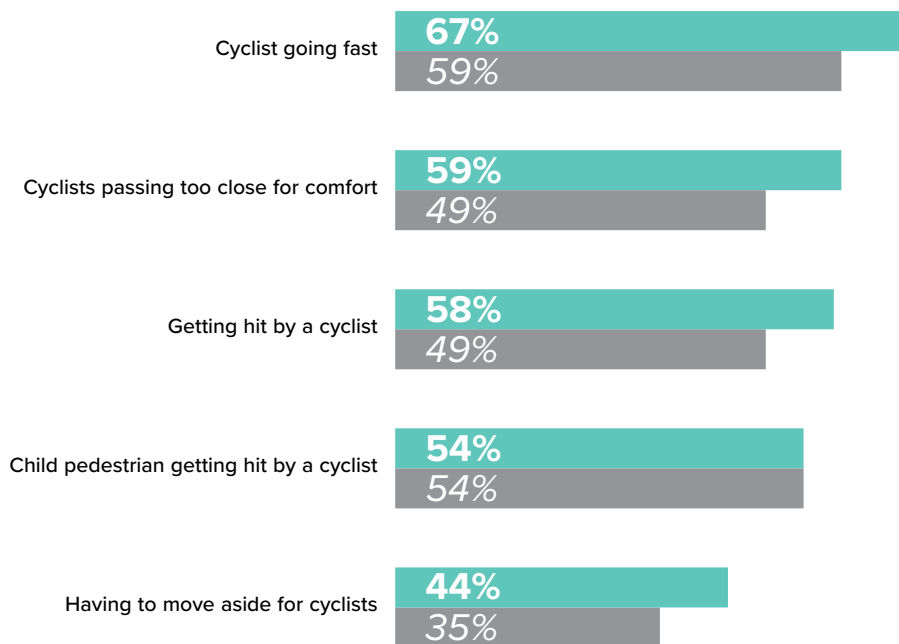
PROPORTION OF CHILDREN 12 OR UNDER WHO CYCLE



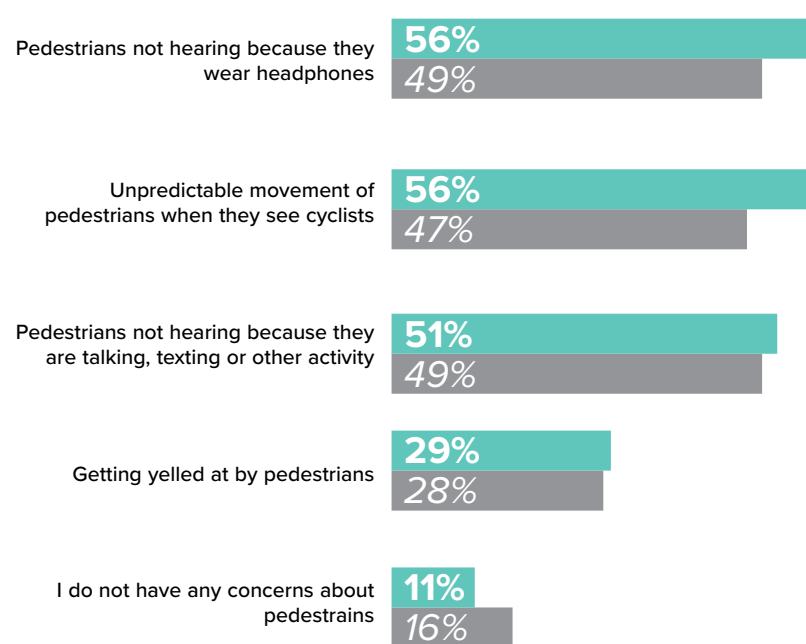
Despite a belief children should be allowed to cycle on the footpath, fear still exists

For pedestrians the biggest concerns centre around speed and fear of injury. For cyclists, it also comes down to the unpredictable nature of pedestrians.

CONCERNS AS PEDESTRIANS (TOP 5)



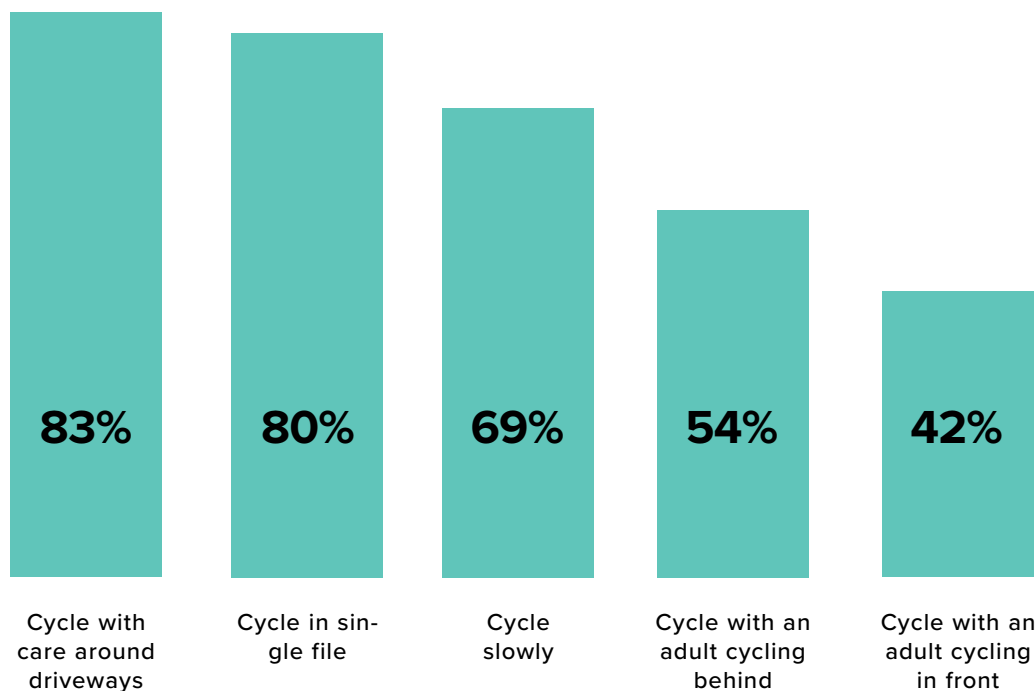
CONCERNS AS CYCLISTS (TOP 5)



All pedestrians
 Families with children who cycle

Perceptions of good behaviour from children on the footpath include care, consideration and reduced speed

PERCEPTIONS OF GOOD BEHAVIOUR FROM ADULTS



And for most 63% , one friendly bell would be suitable to indicate passing.



Lots of dings 20%
Verbal warning 14%

Q. How often do you see the following behaviour on the road from motorists? Base: n=1,507 (motorists)

IMPLICATION

Footpath cycling for children is the norm and there is a firm belief it is acceptable

There is a desire for improved behaviour around footpath cycling.

These centre around four main elements:

- Care
- Consideration
- Reduced speed
- And importantly – communication (one bell).



Bringing it all
together

5



To recap our core objectives:

1. Improve safety

Improving the safety of those who travel by bicycle

2. Increase cycling

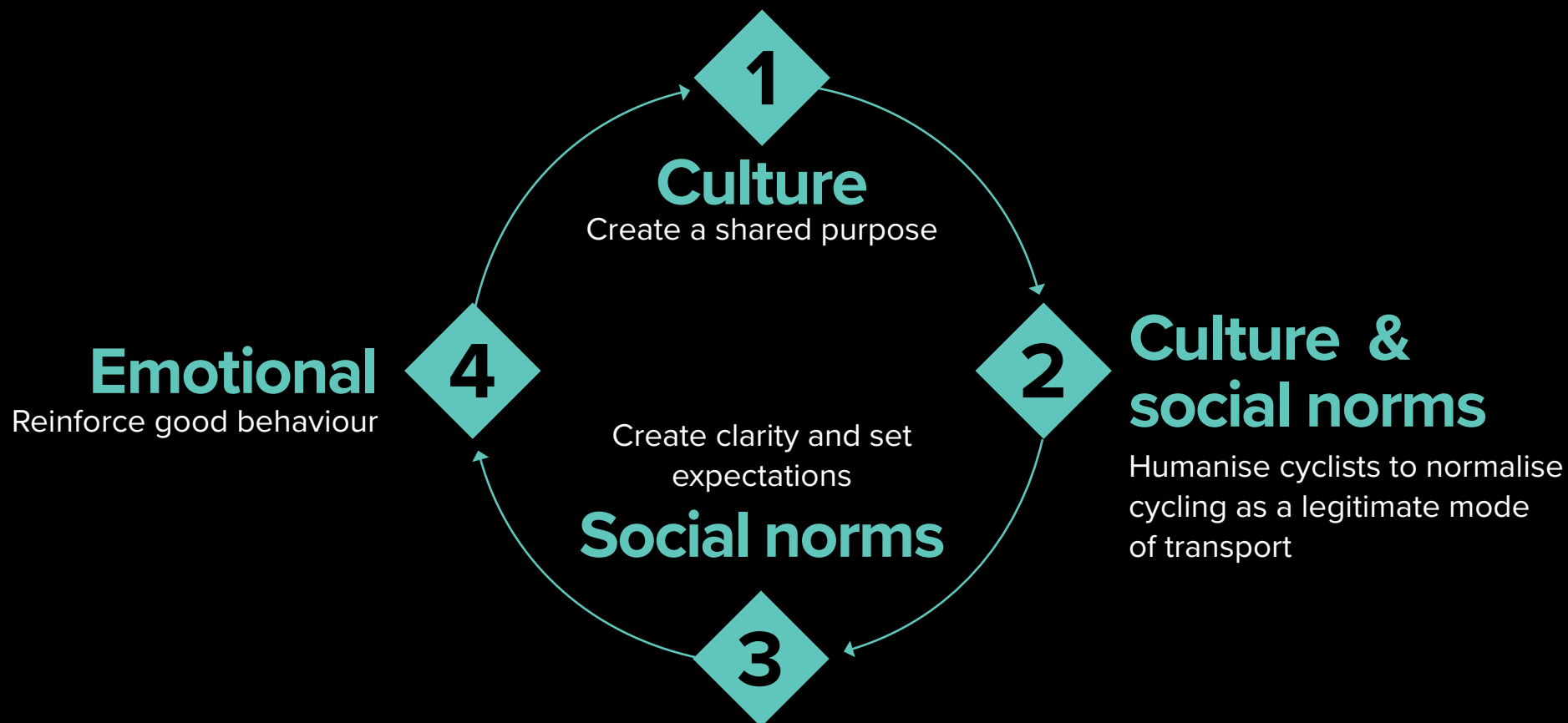
Increasing the number of people choosing to travel by bicycle

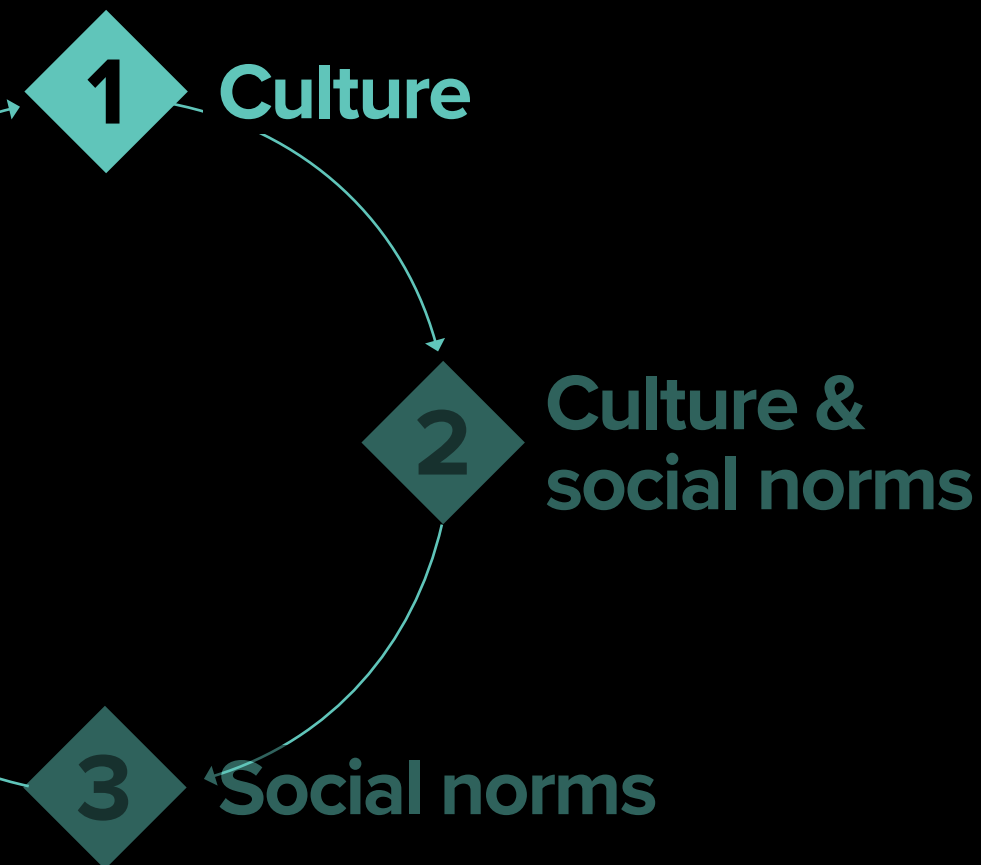
These goals are inter-linked, as improving safety will address one of the key barriers to the uptake of cycling.

This means investing in community engagement, public education, communication programme and, of course, continued investment in infrastructure.

So what are the guiding principles we can use to inform the development of these streams of work?

There are 4 main elements we must blend into all programmes





ELEMENT 1 – CULTURE

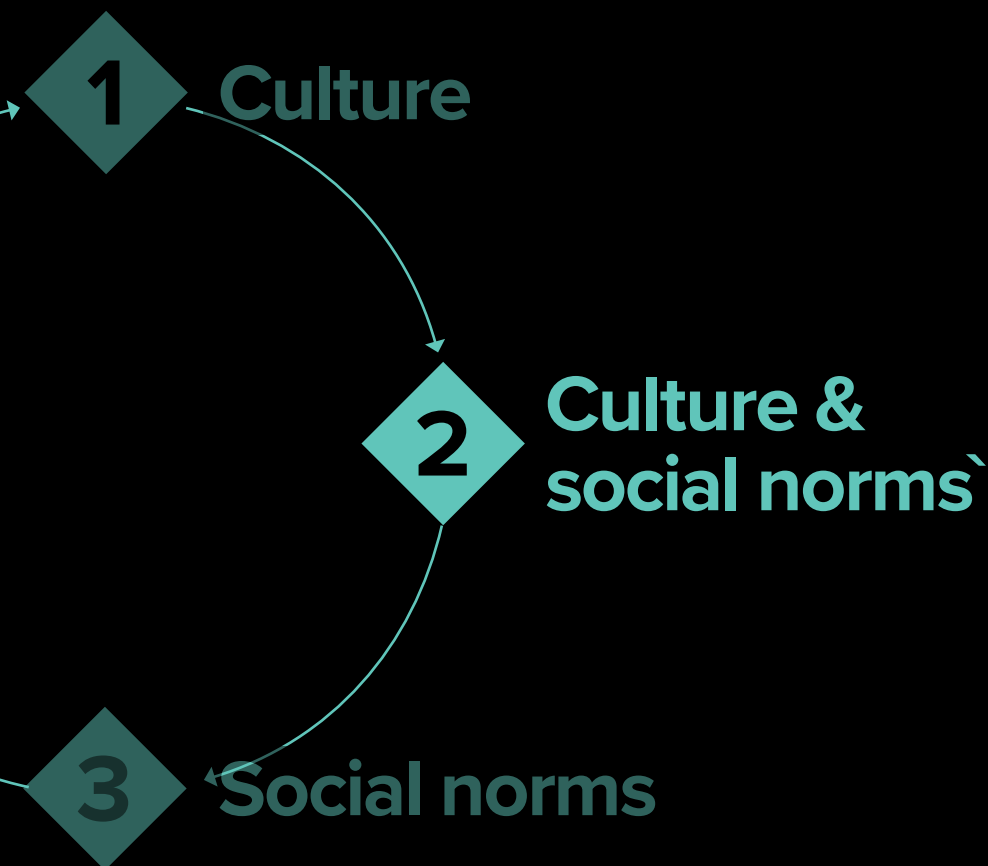
Create a higher order shared purpose

We need to promote a friendlier driving culture and foster a more collective relationship between all on the roads (and footpaths).

There is a powerful notion of flow that can bridge the shared purpose of cyclists and motorists.

The idea of flow encapsulates:

- The desire to travel freely with a shared sense of progress and equilibrium
- Shared values of equality and unity on the roads
- A sense of interdependence and synergy that influences behaviour
- An environment of trust and mutual expectation
- An individual feeling of freedom, control and momentum



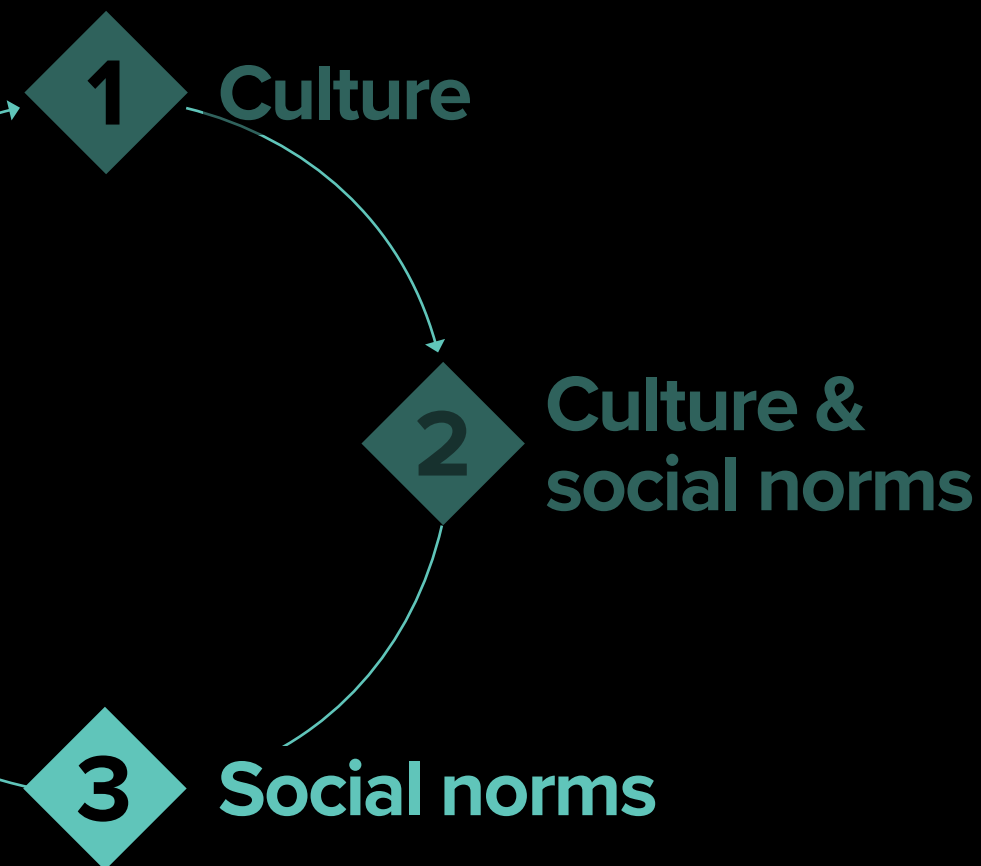
ELEMENT 2 – CULTURE & SOCIAL NORMS

Normalise mainstream cyclists to equalise cycling as a legitimate mode of transport

There is a small but significant out-group of cyclists that the average New Zealander finds unrelatable and that is driving negativity towards cycling in general.

Most cyclists are just one of us, they're human and genuinely have a mutual respect for others on the road.

This means we must humanise and personalise. Social norming will then have an extrinsic effect on empathy and respect for those sharing the road.



ELEMENT 3 – SOCIAL NORMS

Clarity brings comfort

We need to bring clarity to the rules and expected behaviour for everyone on the road, both cyclist and driver.

However, it is important this must not come from an authoritarian perspective - it must be a balanced view from both sides (cyclists and motorists).

This will move us towards our shared purpose...

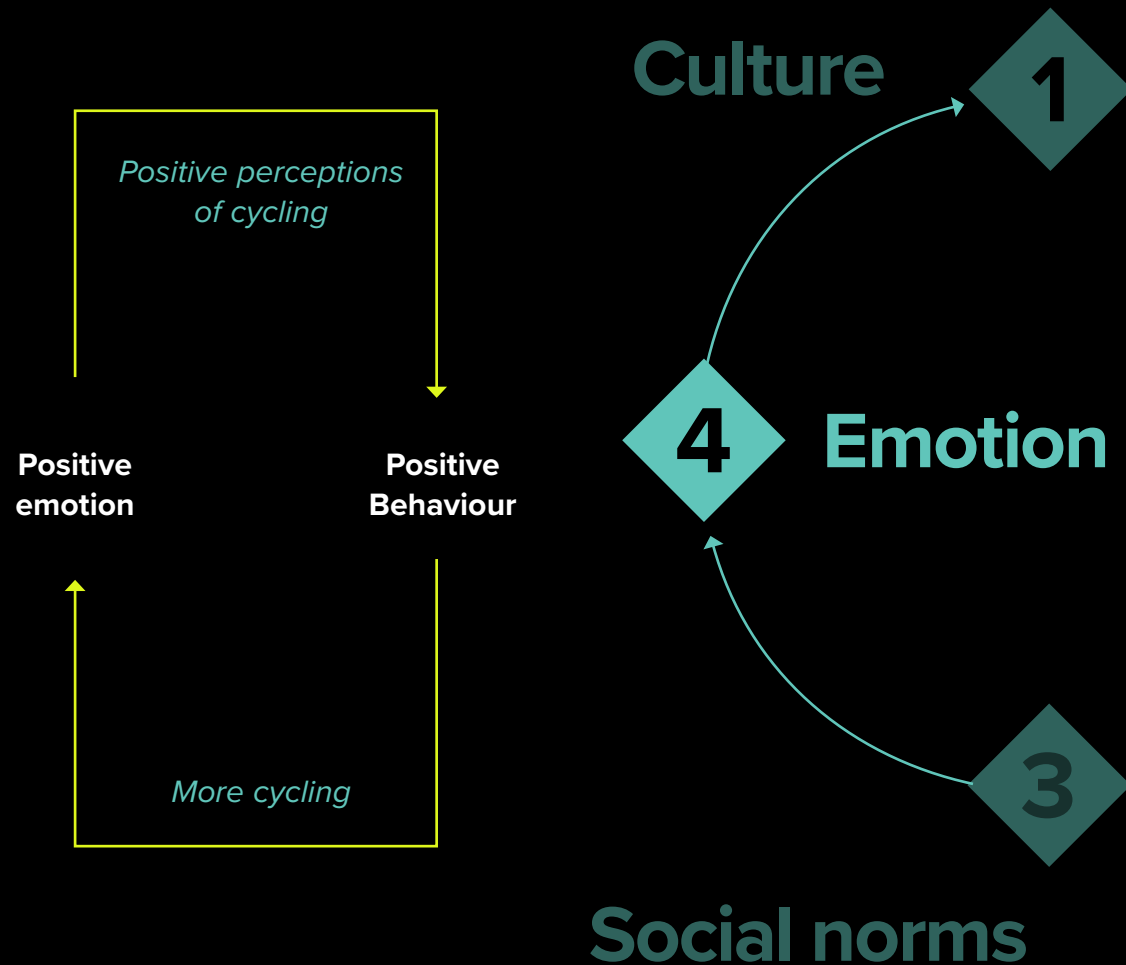
ELEMENT 4 – EMOTION

Reinforce good behaviour

With any successful behaviour change programme, we must ensure positive behaviour is reinforced. This will leverage emotion as a reinforcer for the individual.

Reinforcement might be through how we communicate progress or even mean developing new ways of acknowledging good behaviour on the road.

Reinforcement is also integral to cultivating social norms and a better road culture. Commitment to reinforcing and rewarding behaviour will ensure efforts go beyond a single campaign or point in time push to improve ‘perceptions’ to create enduring and sustainable improvement to behaviour on our roads.



Appendix

6



Specific share the road situations

- Scenarios
- Definition of cyclists and occasions
- Pedestrian concerns

Clarity vs. Confusion in different contexts

The two major contexts require different behaviour and expectations.



Slower speed urban

- When there are obstructions (intersections, roundabouts, parked cars, pedestrians) motorists and cyclists are unified in their perception that cyclists need to take the lane and **act like a car**. This means adhering to the road rules over and above courtesy in order to anticipate behaviour to act safely.

High speed rural

- High speed roads where traffic is in full flow is where **cyclists need to behave and be treated differently to cars**. This is largely due to the slower speed of cyclists but also due to their safety. In this context, cyclists need to keep left and be as separate from cars as possible.



Taking the lane

Taking the lane is a clear example of how behaviour and perceptions differ between the different contexts.



Slower speed urban

For slower speed urban contexts where there are obstructions to flow, there is a need for clarity and ability to anticipate behaviour – allowing cyclists to take the lane as well as abiding the road rules will improve clarity.



Higher speed rural

For high speed, rural roads the speed difference between cyclists and cars is amplified and thus, so are the safety implications. In this situation, both cyclists and motorists agree that cyclists need to behave and be treated very differently to cars and stay as far away from each other as possible i.e.. not taking the lane.

Cyclists not being seen at intersections and roundabouts



Intersections and roundabouts are key examples of when cyclists need to act as cars (**not** keep left/too the side/out of the way) as there is confusion around how cyclists will behave and is difficult to anticipate their behaviour.

This is where they need to take the lane and act like a car and indicate where they can.



Motorist Perception

Motorists are aware that they do not often see cyclists in these areas. Motorists are looking for clarity around cyclist behaviour and certainty that cyclists will take the lane but also continue to follow the common road rules when they do (indicate, give way etc.)



Cyclist Perception

Again, cyclists are often on high alert and hoping that they will be seen. Instilling confidence in cyclists to take the lane and act like a car or providing off road alternatives will be important for cyclists with lower road confidence.

Doored



Motorist Perception

Motorists understand that they need to be more aware of cyclists around them, especially in areas and times when cyclists are frequent (e.g. afterschool).

Individual drivers didn't think that they were culprits but knew that it happened. They found it was difficult to remind their kids to look for cyclists when getting out of the car.



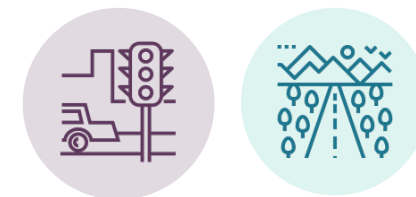
"They [my kids] just rush out of the car."
Motorist

Cyclist Perception

Cyclists continue to be weary and monitor speed, while looking for separated lanes in high traffic areas.

They are often on high alert and looking to see if they could see people in their cars. A lot is out of their control "I hope they see me...here we go." They feel there is nowhere to escape, so they feel helpless.

Variability of cyclists on hills



Motorist Perception

This scenario is where we clearly see the out group perceptions of MAMILs. Motorists understand that they need to pass safely so feel the pressure and onus of Duty of Care. However, road cyclists and group road cyclists feel unpredictable and difficult to overtake – this is when the responsibility often turns to anger and frustration.

Whereas for regular cyclists, motorists are more likely to have positive perceptions of cyclists such as ‘good on you’ and admiration.

Cyclist Perception

Cyclists are generally aware that they are inconveniencing drivers and do what they can to keep left on the uphill. However, on the fast downhill, cyclists feel the need to choose between taking the lane and committing to speed on the road or slowing down and keeping left.





Passing on high speed roads

Motorist Perception

Motorists know that they need to pass safely or slow down and wait, but slowing down is frustrating and sometimes dangerous for them (if other motorists are close behind them) and thus the motorists are more likely to overtake- giving the cyclist as much space as they can, but often this is not the full 1.5m



Cyclist Perception

Cyclists feel very tense and nervous for their safety on high speed roads and aim to keep as far left as possible – which can be difficult when the shoulder is narrow or full of gravel. They often feel that motorists are not abiding by the 1.5m rule.

Trucks going past cyclists



Motorist and cyclists perceptions

Both cyclists and motorists acknowledge that it's difficult for trucks to slow down and thus opt for an overtake (whether it's safe or not). Both groups felt it was just as much about roading infrastructure (small shoulders, bumpy gravel) than it was truck driver behaviour

There is also a feeling from motorists that cyclists shouldn't really be on those kind of roads in the first place (i.e.. high speed highways) and a feeling from cyclists that they don't want to be on rural high speed roads with narrow shoulders given a choice.



Cycling penetration

Column %	Total	Male	Female	18-29	30-39	40-49	50-59	60+
Cyclist	40%	45%	35%	49%	47%	43%	40%	26%
Cyclist (Regular)	15%	18%	12%	20%	20%	14%	12%	10%
Cyclist (Non Regular)	25%	27%	24%	29%	27%	30%	28%	16%
Non Cyclist	60%	55%	65%	51%	53%	57%	60%	74%
Motorist	100%	100%	100%	100%	100%	100%	100%	100%
Motorist (Regular)	94%	95%	93%	89%	92%	96%	93%	98%
Motorist (Non Regular)	6%	5%	7%	11%	8%	4%	7%	2%
Households with Children under 12 who cycle	18%	15%	20%	11%	38%	38%	9%	2%
Base	1507	721	786	330	257	285	242	393

Column %	ALK/WGTN/C HCH	North Island	South Island	Auckland	Wellington	Canterbury
Cyclist	41%	38%	45%	39%	37%	51%
Cyclist (Regular)	16%	14%	16%	16%	11%	20%
Cyclist (Non Regular)	25%	24%	29%	23%	26%	30%
Non Cyclist	59%	62%	55%	61%	63%	49%
Motorist	100%	100%	100%	100%	100%	100%
Motorist (Regular)	94%	94%	93%	93%	94%	95%
Motorist (Non Regular)	6%	6%	7%	7%	6%	5%
Households with Children under 12 who cycle	21%	18%	17%	21%	21%	20%
Base	900	1168	339	514	197	189

Type of bike

Column %	Total
Commuter/hybrid bike	9%
Mountain bike	46%
Road bike	44%
Electric bike (e-bike)	4%
BMX	5%
Other type of bicycle (please specify)	2%
Base	610

'UC3 (What type of bicycle do you use?)

Definitions of cyclists

Group road cyclist

Cyclists on road bikes, typically travelling at faster speeds and often in more rural areas and back roads. Cycling in a pair or group.



Road cyclist

Cyclist on a road bike, wearing lycra and cycling shoes, typically travelling at faster speeds in urban/suburban areas on their commute to work or for leisure.



Faster commuter

Cyclist on a commuter bike, mountain bike, e-bike or road bike, typically travelling at a faster speed around urban/suburban areas to work/study/their destination. Changes clothes at work/destination.



School Student cyclist

Cyclist aged 10-15 years old travelling at medium speed on the footpath or road on their own or with friends on their way to/from school.



Leisure cyclist

Cyclist on a commuter bike, mountain bike or e-bike, wearing regular clothes and typically riding for leisure on cycle ways and scenic paths.



Casual cyclist

Cyclist typically travelling at a slower or medium speed around urban/suburban areas to work/study/their destination.



Regular commuter

Cyclist wearing everyday work clothes and typically travelling at a slower or medium speed around urban/suburban areas to work/study/their destination.



Family group

Adult cyclist and children travelling at a slower speed around urban/suburban areas or cycle ways, footpaths and scenic paths.



Comfort with cycling

Column %	Total	Cyclist (Regular)	Cyclist (Non Regular)	Road Cyclist + Group road cyclist + Faster commuter	Regular commuter	Casual Cyclist	Leisure cyclist	Family Group
Not at all confident 0	0%	1%	0%	0%	4%	0%	0%	0%
1	1%	0%	1%	0%	2%	1%	0%	1%
2	0%	0%	0%	0%	0%	1%	0%	1%
3	4%	2%	5%	2%	8%	2%	6%	0%
4	3%	0%	5%	1%	0%	3%	5%	2%
5	11%	9%	12%	7%	11%	14%	9%	19%
6	13%	9%	15%	6%	9%	16%	15%	9%
7	19%	20%	19%	19%	16%	21%	20%	15%
8	20%	28%	15%	25%	22%	21%	18%	19%
9	13%	12%	14%	20%	10%	11%	13%	15%
Extremely confident 10	15%	18%	13%	21%	17%	11%	13%	20%
	610	233	377	67	53	141	267	82

'UC5 (How confident are you as a cyclist?)

Visibility of cycling

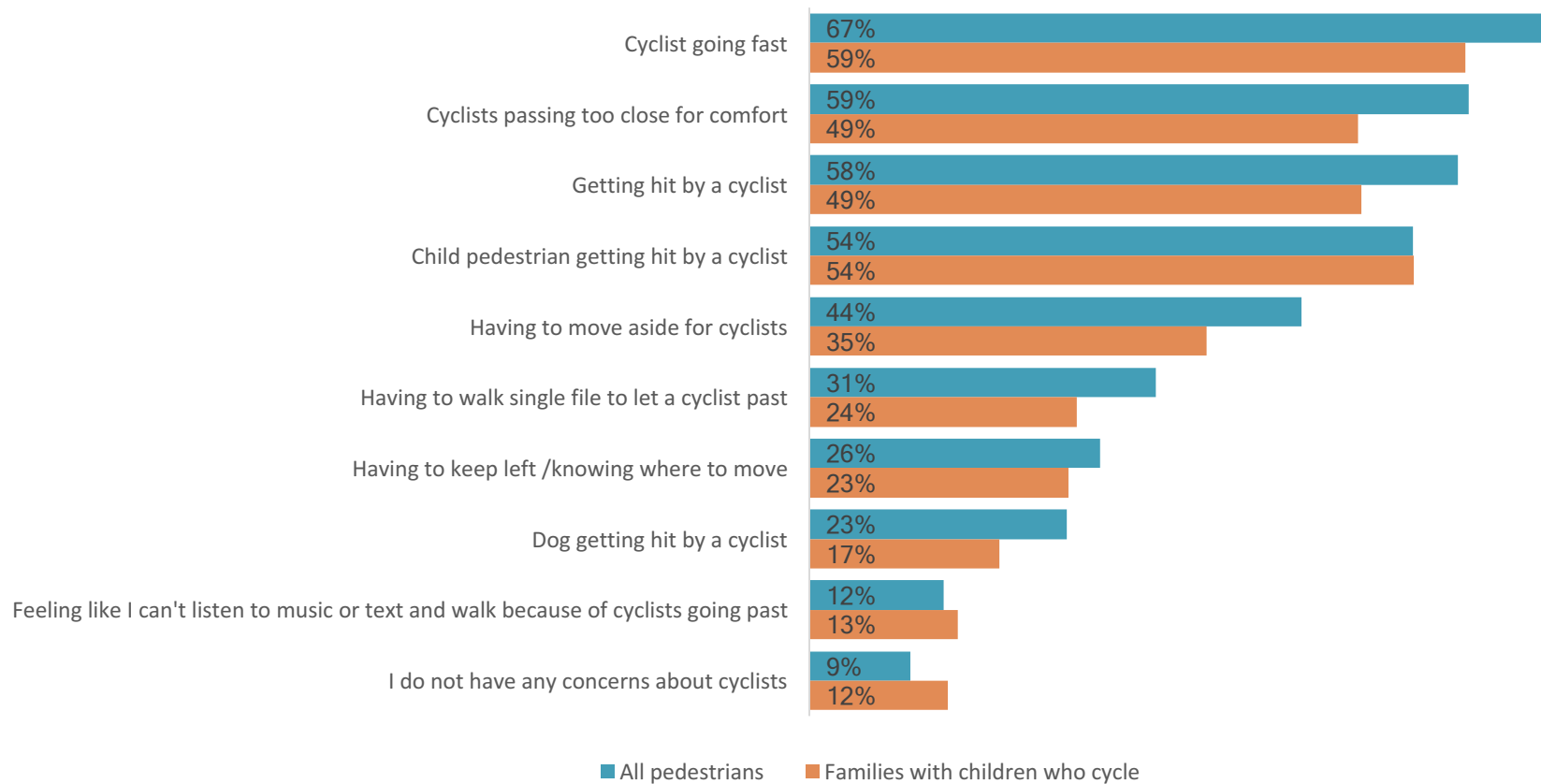
Column %	Group road cyclist	Road Cyclist	Casual Cyclist	Regular commuter	Faster commuter	Leisure cyclist	Family Group
I never see these types of cyclists	3%	2%	6%	6%	8%	3%	8%
I hardly ever see this type of cyclist	20%	10%	21%	18%	26%	20%	37%
I see this type of cyclist a little	39%	33%	44%	39%	38%	44%	39%
I see this type of cyclist a lot	30%	39%	22%	29%	21%	27%	12%
I see this type of cyclist all the time	9%	16%	7%	9%	7%	7%	4%
I see this type of cyclist a little + I see this type of cyclist a lot + I see this type of cyclist all the time	77%	88%	73%	76%	66%	77%	55%
Base	1507	1507	1507	1507	1507	1507	1507

Cyclists and occasions

	ALL CYCLISTS	Road Cyclist + Group road cyclist + Faster commuter	Regular commuter	Casual Cyclist	Leisure cyclist	Family Group
For recreation or fitness	74%	74%	39%	64%	88%	66%
For organised sport (e.g. track racing, mountain biking)	6%	18%	5%	5%	5%	3%
Family outing, teach kids how to cycle	20%	14%	18%	13%	16%	52%
NET Vehicle replacement trip	49%	60%	81%	66%	32%	41%
To get to/from shops (e.g. groceries, clothing, post shop, banking)	19%	18%	19%	33%	15%	12%
To get somewhere else (e.g. place of worship, sports group, gym, library)	19%	24%	29%	29%	12%	11%
To go to/from visiting friends or family	19%	16%	31%	28%	14%	10%
To go to/from work	13%	27%	44%	13%	6%	4%
To get to/from school, college, university	5%	8%	21%	4%	3%	3%
Take children to/from school or day-care	5%	4%	13%	3%	2%	14%
To get to/from public transport	5%	8%	10%	7%	3%	3%
As part of my job (e.g. couriers, work errands, to get to meetings)	2%	6%	4%	3%	2%	0%

Pedestrian concerns

Concerns as pedestrians



Thanks for listening.



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