



2022 Understanding attitudes and perceptions of cycling & walking

WAKA KOTAHI



TRA

BACKGROUND OF OUR RESEARCH PROGRAMME

This study provides a way of monitoring attitudes and behaviours around walking and cycling, in response to ongoing efforts to improve our cities for people getting around on foot or by bike.

Increasing the share of travel by public transport, walking and cycling in New Zealand's cities has a critical role to play in improving the wellbeing of New Zealanders by creating more accessible and inclusive cities that are prosperous, safe, healthy, and sustainable. The government aspires to provide genuine travel choices as a key way to improve access to social and economic opportunities.

Over the last seven years, Waka Kotahi and our council partners have significantly increased investment in improving the quality and quantity of walking and cycling facilities and programmes to support their use. In recent years, there has been significant growth in the use of these shared and active modes in our cities but there remains a need to do much more.

The primary objectives of the research programme

1

Measure and monitor walking and cycling behaviour

- Comparing results over time (2022 vs 2021, 2020, 2019 & 2018).
- Comparing results across main urban centres.

2

Understand attitudes and perceptions towards walking, cycling, and recent investments and initiatives.

3

Identify opportunities to increase the number of trips, and the proportion and diversity of people travelling by active modes.

The approach

Monitoring the effectiveness of the Urban Cycling Programme roll-out by measuring behaviour and understanding attitudes and perceptions around urban walking and cycling.

A 15-minute online survey of n=3,278 New Zealanders

With a focus on key regions of:

- Auckland n=554
- Wellington n=524
- Christchurch n=640
- Hamilton n=526
- Tauranga n=510
- Dunedin n=524

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

- n=2,947 +/-2.1%
- n~500 is +/-4.4%
- n~200 is +/-6.9%

Fieldwork ran from Jan 11th 2022 – December 29th 2022

Daily invitations were sent out continuously over the fieldwork period, to ensure that seasonal difference were accounted for.

Fieldwork was completed via an online survey using Dynata's research panel

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

Interlocking quotas were utilised

Age and gender within each region, to ensure data is representative according to Stats NZ 2018 census.

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

Data was weighted to be representative of the calendar year with a population n=3278 New Zealanders

The key regions were weighted to:

- Auckland 24%
- Wellington 24%
- Christchurch 24%
- Hamilton 9%
- Tauranga 9%
- Dunedin 9%

People living in these areas will be referred to as Urban New Zealanders

Changes to the survey

IMPACT COMPARISON OVER TIME

In 2020, improvements were made to questions and question order. Changes include clarification of response options and rationalisation of questions to prevent people needing to answer similar questions.

The question order was changed to ensure questions are asked in a logical flow in line with travel behaviour. The change in question order and questions means direct comparability of results is impacted. Where question wording and response options are the same comparisons have been included, and any impacts of the changes have been highlighted.

CONTINUOUS TRACKING

Further improvements were made to the questionnaire sampling methodology in 2021. This was done to compare seasonal shifts and to get an accurate reflection of the calendar year. 2021 sampling includes a continuous / 'always on' sampling approach, where interviews are collected daily across the research period, from January'21 – December'21.

In order to assess the impact of this change in methodology, a 'parallel run' sample was collected across May – June 2021, to correspond with historic data capture. This 'dip' data is referenced in this report where relevant to highlight, for example, where a change in methodology impacts how we interpret trended results.

When reporting the 2021 calendar year results and the dip data has been down-weighted from a total sample of 4,924 to represent the equivalent monthly sample collected throughout the year.

2018	2019	2020	2021	2022
May 21st – June 24th	May 22nd – June 24th	28th May – 30th June	11th January – 29th December	11th January – 29th December

Summary: Key findings

Summary: Overall

OVERALL TRAVEL BEHAVIOUR

- Walking and cycling are fundamental to how New Zealanders get around, with most (69%) walking or cycling regularly.
- However, the use of Active Modes has decreased significantly from 2021 as we emerge into a post-Covid world.
- The decrease in Active Modes usage is driven by fewer people walking regularly compared to 2020 and 2021. Although, the number of New Zealanders walking regularly remains above pre-Covid levels.
- Dunedin and Wellington are the two cities with the highest levels of walking, while cycling is highest in Christchurch. Hamilton significantly under-indexes in the number of people walking and cycling regularly.
- While regular public transport remains stable over the last few years, regular motor vehicle usage continues to rise.



Summary: Walking



WALKING BEHAVIOUR

- Walking levels have remained stable since 2021, with close to three-quarters (73%) of urban New Zealanders walking* in the last 12 months.
- Levels of walking differ at a regional level; Wellington and Dunedin have the highest rates of urban walking. Auckland and Hamilton have the lowest levels of urban walking.
- Committed commuters (those walking to commute most days) are more likely to be younger and female. Men, however, are over-represented in the non-walker segment, while higher earners and NZ Europeans are under-represented.

*walking 100m or crossing the road.

SUPPORT FOR WALKING

- Nearly 7 in 10 (69%) urban New Zealanders see walking as a great way to get around town quickly and easily.
- However, perceptions that walking is a great way to get around town has softened since 2021. This decline coincides with fewer people walking regularly in 2022.
- Perceptions of walking being a great way to get around is lower during the winter months.

BARRIERS AND ENABLERS FOR WALKING

- Barriers to walking remain consistent over time and centered around safety, ease and access, and logistics. The largest barriers are not feeling safe walking in the dark and walking not being a quick way to get places.
- Safety in the dark is a greater barrier in Hamilton. The time walking adds to a journey is a more prominent barrier in Hamilton and Christchurch, while walking not being a quick way to get places is also a greater barrier in Christchurch.
- While 8 in 10 feel safe walking, this perception has continued to decrease year on year.
- The largest motivators to walk are personal factors, such as providing fitness, enjoyment and 'me time'. Saving money is also an important motivator which has significantly increased since 2021.

Summary: Cycling



TRAVEL BEHAVIOUR

- Cycling levels amongst urban New Zealanders remains stable from 2021, with one-quarter cycling at least once in the past year.
- Cycling participation has declined significantly in Hamilton, a city with high levels of riding last year.
- While most urban New Zealanders can ride a bicycle (81%), ownership and access remains low with half unable to access a bicycle (50%). The lack of access continues to be a major contributor to the three-quarter of urban New Zealanders who have not cycled in the last 12 months.

SUPPORT FOR CYCLING

- Over half (54%) of urban New Zealanders think cycling is a great way of getting around. However, this perception has continued to soften in 2022 and remains significantly below 2019 (67%).
- Perceptions of cycling being a great way to get around is lower during the winter months.
- Despite some softening overtime, overall support for cycling remains high with over two-thirds (68%) supporting cycling in their communities. Hamilton has seen a significant decline in their support for cycling.
- Support of cycling infrastructure remains high but has also softened slightly over the last couple years. Despite this softening support, satisfaction with the current cycling infrastructure remains steady amongst cyclists.

BARRIERS AND ENABLERS FOR CYCLING

- The largest barriers to cycling continue to centre around safety and logistics. The most prominent barrier is not feeling safe because of how people drive. However, in terms of safety, fewer feel that both cycling in the dark and the speed of other road users are a barrier to cycling compared to 2021.
- Safety in the dark is a greater barrier in Hamilton, while the speed of other road users is a larger barrier in Tauranga.
- Overall safety perceptions for cycling have declined 4% since 2021, with half of urban New Zealanders (51%) perceiving cycling as safe. However, this remains significantly greater than pre-Covid levels in 2019.
- The main cycling motivators are largely personal, such as keeping fit and enjoyment – although, the ability to save money is also a key enabler.

Contents

1

The context for walking and cycling

2

Overall travel behaviour

3

A closer look at walking and wheeling

4

A closer look at cycling

5

A closer look at Micro-mobility

6

Support for walking and cycling

7

Opportunities to increase the number of people walking and cycling

8

A deep dive into gender



The context for
walking and cycling

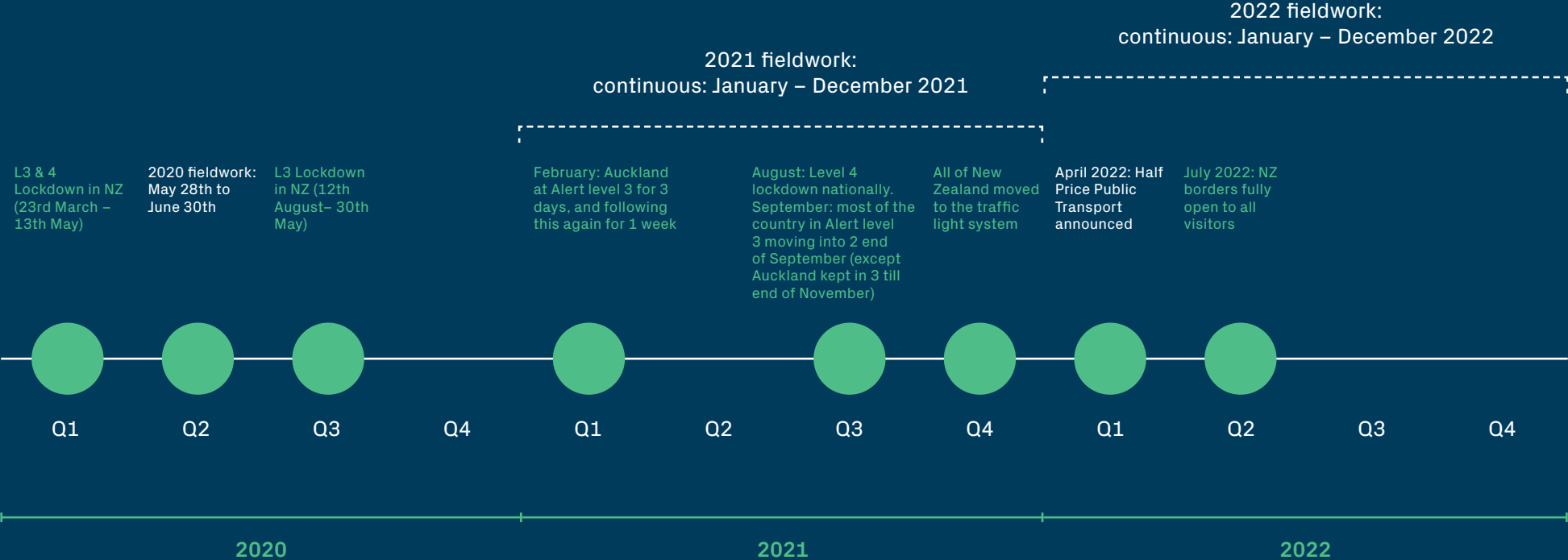
TRA

Summary: The context for walking and cycling

- While Covid-19 continues to impact New Zealanders, easing restrictions throughout 2022 has impacted transport behaviours.
- During 2022, New Zealanders began facing a cost-of-living crisis with inflation reaching 7.2%. This is likely to have impacted how many urban New Zealanders make travel decisions.
- In April 2022, half price public transport fares were announced country wide. This initiative has resulted in around 7% of New Zealanders switching or taking new public transport trips because of half price fares. Switching comprises of 3% from trips previously taken by car/taxi, 3% from trips previously using Active Modes, and a further 1% of people taking entirely new trips.



Over the last 3 years a number of societal events have impacted travel behaviour



The past year has been tough financially for New Zealanders with year-on-year inflation holding at 7.2%

CONSUMER PRICE INDEX – ANNUAL CHANGE

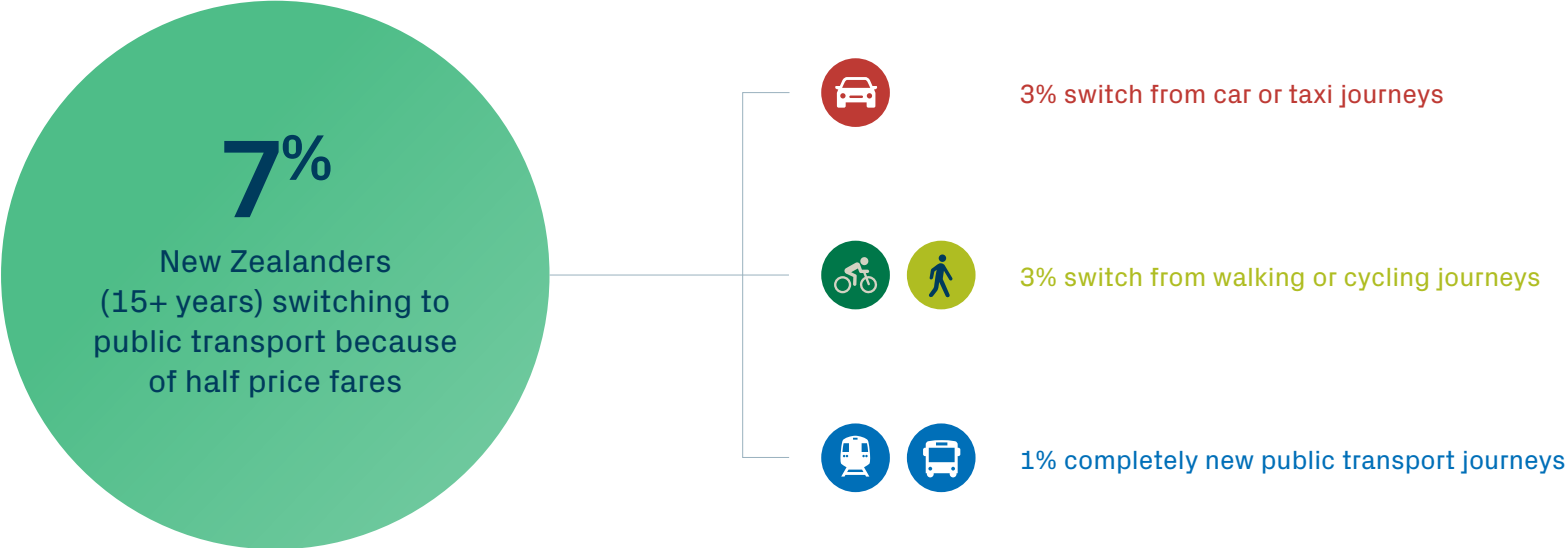


Consumer arrears also reached 11.3% in December 2022 – up 10% from a year earlier and representing a three-year high. This translates to more than 400,000 Kiwi behind on credit repayments.

Source: Stats NZ
<https://www.stats.govt.nz/news/annual-inflation-remains-at-7-2-percent/>
<https://www.newshub.co.nz/home/money/2023/02/cost-of-living-crisis-400-000-kiwis-behind-in-credit-repayments-arrears-up-to-11-3.html>

Public transport usage has also risen due to half price fares – although, 3% have come from what would normally be walking or cycling trips

IMPACT OF HALF PRICE FARES ON TRANSPORT JOURNEYS



Source: Waka Kotahi Research Note 009 Impact of half-price public transport fares – a research note

2

Overall travel behaviour

Summary: Overall travel behaviour

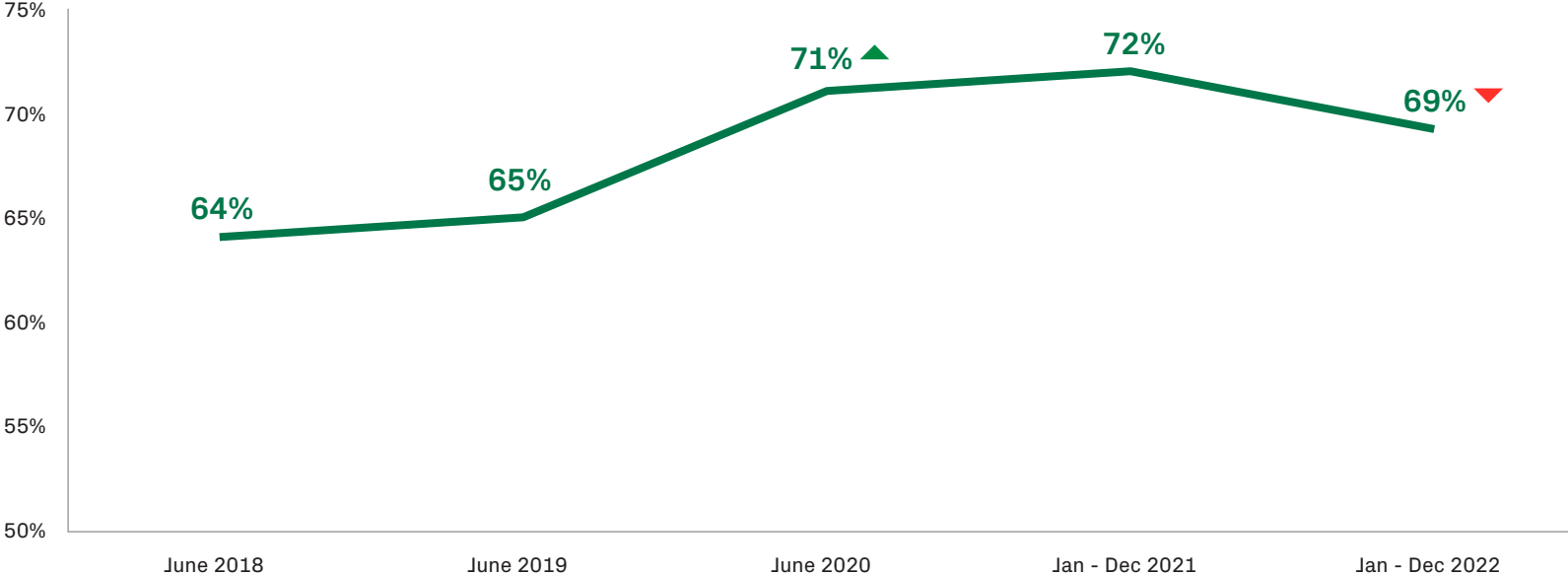
- Walking and cycling are fundamental to how New Zealanders get around, with most (69%) walking or cycling regularly.
- However, the use of Active Modes has decreased significantly from 2021 as we emerge into a post-Covid world.
- The decrease in Active Modes usage is driven by fewer people walking regularly compared to 2020 and 2021. Although, the number of New Zealanders walking regularly remains above pre-Covid levels.
- Dunedin and Wellington are the two cities with the highest levels of walking, while cycling is highest in Christchurch. Hamilton significantly under-indexes in the number of people walking and cycling regularly.
- While regular public transport remains stable over the last few years, regular motor vehicle usage continues to rise.



Active Mode usage declined in 2022, following an uplift in 2020 and 2021, years during which lockdowns were evident



USE OF ACTIVE MODES AT LEAST ONCE PER WEEK



Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, 2018 n=2,115, 2019 n=2,174, 2020 n=2,256, 2021 n=2152, continuous 2021 n= 4924, continuous 2022 n=3278 walking 100m or crossing the road
*Change in question response options. No change in 'at least once a week' response options, ability to compare.
*Change in methodology – continuous data showing 2021 onwards

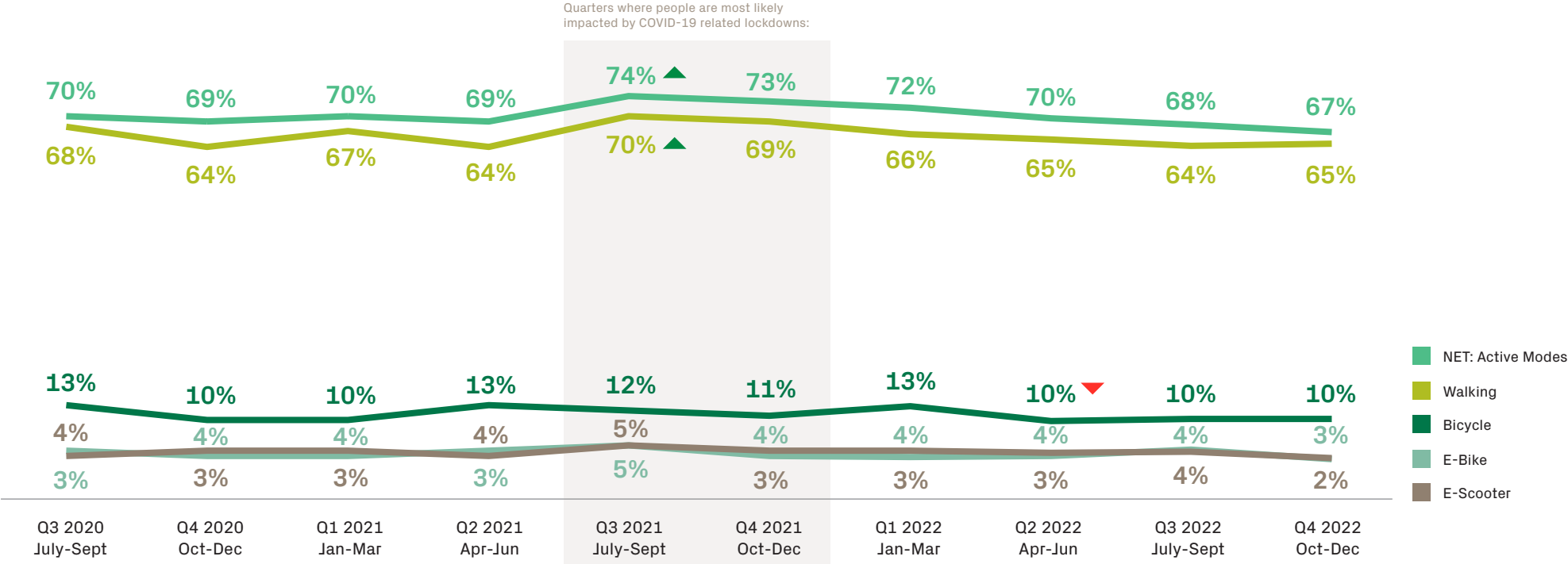
▲ Significantly higher than previous period

▼ Significantly lower than previous period



Active Mode use declined steadily each quarter since Q3 2021

2020/2022 QUARTERLY TRENDS: USE OF ACTIVE MODES AT LEAST ONCE A WEEK



Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, 2018 n=2,115, 2019 n=2,174, 2020 n=2,256, 2021 n=2,152, continuous 2021 n= 4924, continuous 2022 n=3278 walking 100m or crossing the road
 NET: Active Modes (Walking, bicycle, electric bike, electric scooter)
 *Change in question response options. No change in 'at least once a week' response options, ability to compare.
 *Change in methodology – continuous data showing

▲ Significantly higher than previous period
 ▼ Significantly lower than previous period

Specifically walking has significantly declined in 2022, but usage is still above 2018 and 2019 levels



ANNUAL TRENDS: USE OF ACTIVE MODES AT LEAST ONCE A WEEK

	June 2018	June 2019	June 2020	Jan – Dec 2021	Jan – Dec 2022
NET: ACTIVE MODES	64%	65%	71% ▲	72%	69% ▼
Walking	60%	60%	68% ▲	68%	65% ▼
Bike	13%	11%	12%	11%	11%
E-Bike	1%	2%	3%	4%	3%
E-Scooter	2%	2%	3%	4%	4%

- Declines in walking are greatest for:
- 55+ (-6)
 - Hamilton (-5)
 - Dunedin (-7)
 - Males (-3)

Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, 2018 n=2,115, 2019 n=2,174, 2020 n=2,256, 2021 n=2152, continuous 2021 n=4924, continuous 2022 n=3278
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter)
 Change in question response options. No change in 'at least once a week' response options, ability to compare.
 *Change in methodology – continuous data showing
 *Note: Taxi and Rideshare added in 2020

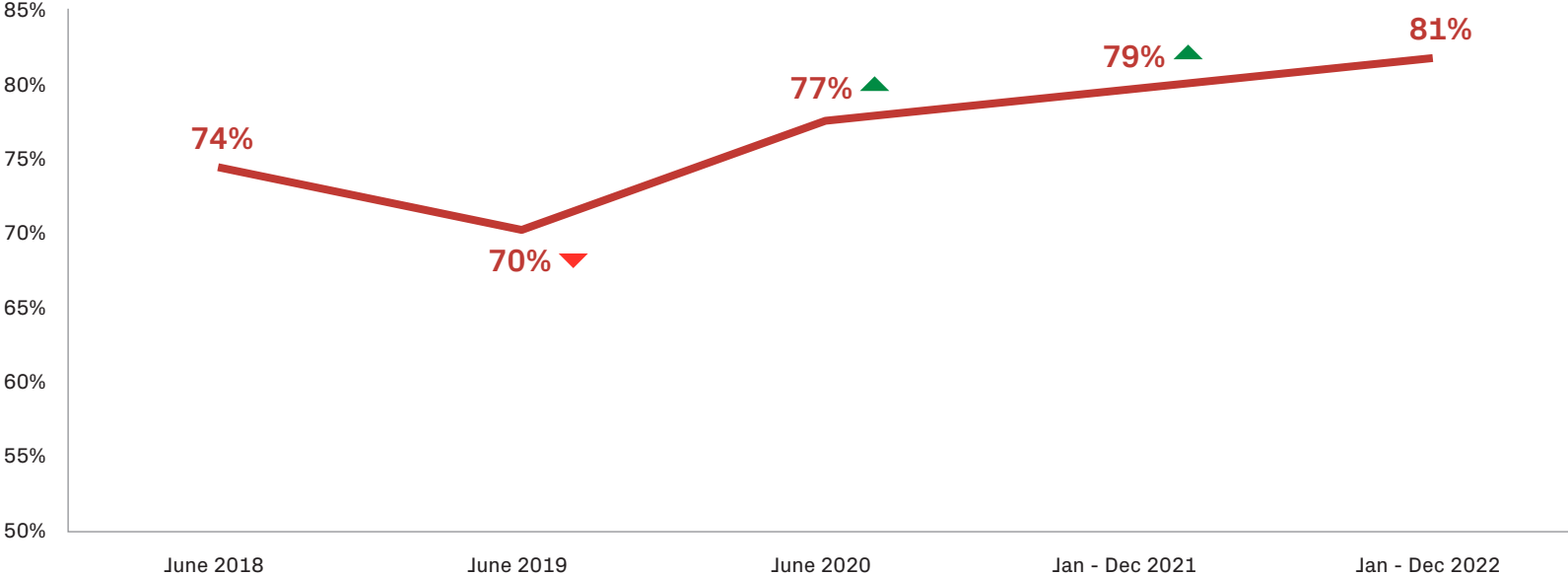
▲ Significantly higher than previous period

▼ Significantly lower than previous period



The proportion of people using motorised vehicles at least once per week continues to rise from 2019

USE OF MOTORISED VEHICLES - AT LEAST ONCE PER WEEK



Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, June 2018 n=2,115, June 2019 n=2,174, June 2020 n=2,256, June 2021 n=2152, continuous 2021 n=4924, continuous 2022 n=3278
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter)
 *Change in question response options. No change in 'at least once a week' response options, ability to compare.
 *Change in methodology – continuous data showing

▲ Significantly higher than previous period
 ▼ Significantly lower than previous period

Private or company vehicle is the mode which has driven overall increases in motorised vehicle usage since 2019



ANNUAL TRENDS : USAGE OF MOTORISED VEHICLES AT LEAST ONCE A WEEK

	June 2018	June 2019	June 2020	Jan - Dec 2021	Jan - Dec 2022
NET: Motorised vehicle	74%	70% ▼	77% ▲	79% ▲	81%
Private or company motor vehicle / car / truck / van	73%	68% ▼	73% ▲	75%	77%
Taxi / ride share	-	-	5%	7% ▲	6%
Motorbike / scooter	3%	3%	4%	4%	3% ▼

Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, 2018 n=2,115, 2019 n=2,174, 2020 n=2,256. 2021 n=2152, continuous 2021 n=4924, continuous 2022 n=3278

NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter)

*Change in question response options. No change in 'at least once a week' response options, ability to compare.

*Change in methodology – continuous data showing

* Note: Taxi and Rideshare added in 2020

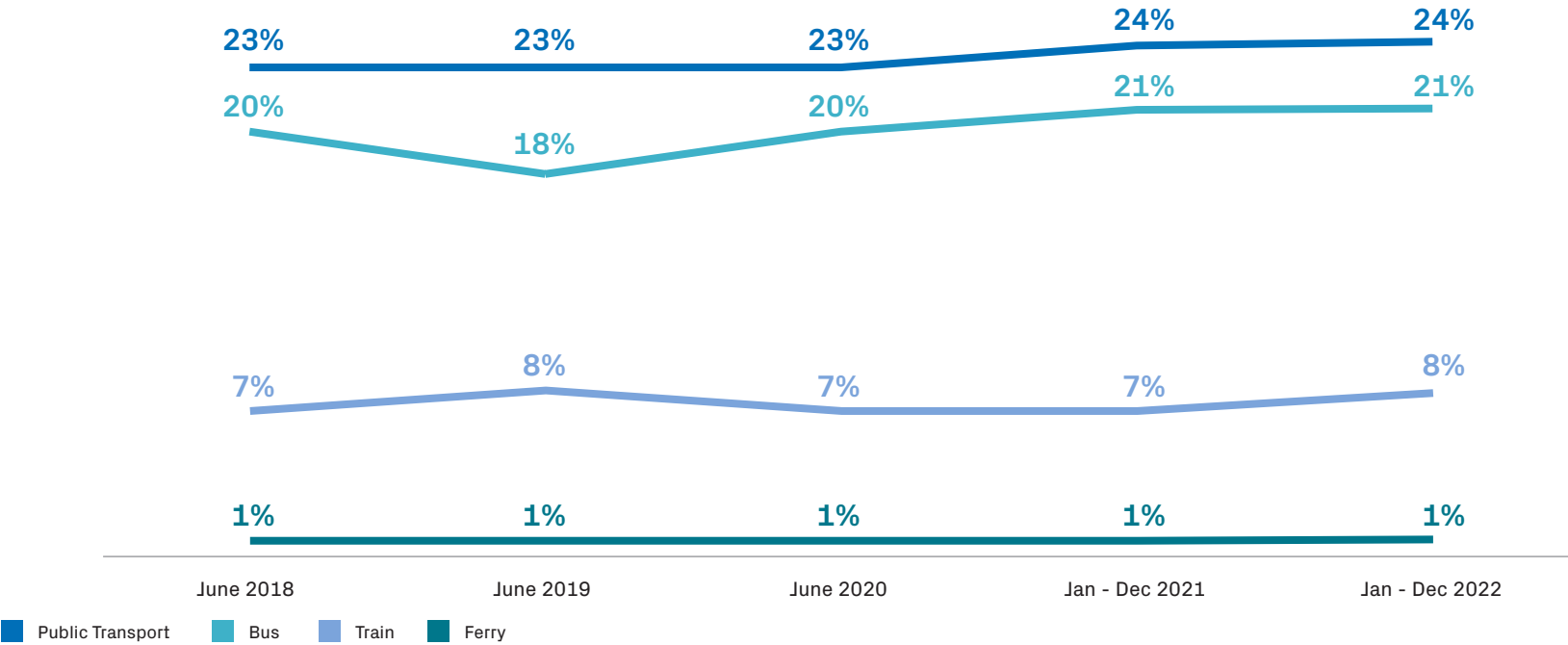
▲ Significantly higher than previous period

▼ Significantly lower than previous period



Despite public transport discounts, regular usage (at least once a week) of public transport remains stable

USE OF PUBLIC TRANSPORT AT LEAST ONCE PER WEEK



Over 2022, there has been multiple bus driver shortages resulting in many trip cancellations across the country. This could possibly be contributing to why weekly public transport use is remaining stable despite half price fares.

Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, 2018 n=2,115, 2019 n=2,174, 2020 n=2,256. 2021 n=2152, continuous 2021 n= 4924, continuous 2022 n=3278
 NET: Public Transport (Bus, Train, Ferry)
 Change in question response options. No change in 'at least once a week' response options, ability to compare. Change in methodology – continuous data showing

▲ Significantly higher than previous period

▼ Significantly lower than previous period

Transportation use differs significantly by region, with Hamilton using Active Modes significantly less than other regions

REGULAR MODES OF TRANSPORTATION - AT LEAST ONCE A WEEK – JAN-DEC '22

	Total Jan-Dec'22	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
NET: Motorised vehicle	81%	82%	79%	88% ▲	73% ▼	86% ▲	79%
Walking*	65%	62%	58% ▼	63%	70% ▲	65%	69% ▲
NET: Cycling	14%	11%	10% ▼	16%	10% ▼	19% ▲	10% ▼
NET: Public transport	24%	31% ▲	15% ▼	9% ▼	37% ▲	17% ▼	17% ▼

Tauranga and Christchurch have the highest levels of motorised vehicle usage, as well as significantly lower regular public transport uptake compared to other cities.

Hamilton has the lowest levels of walking, and low levels of cycling and public transport.

Dunedin and Wellington have the lowest levels of cycling but the top two levels of walking.

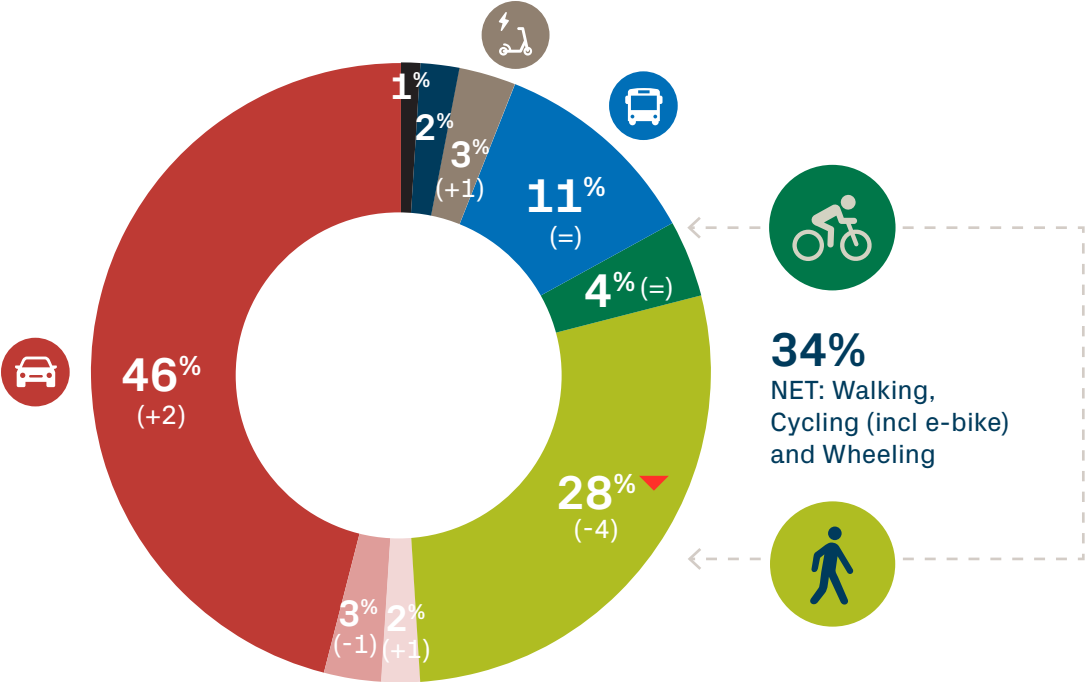
Regular public transport uptake shows widest variation across regions.

Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, continuous 2022 n=3278, Auckland n=554, Hamilton n=525, Tauranga n=509, Wellington n=522, Christchurch n=637, Dunedin n=522
 *walking 100m or crossing the road
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter) NET: Cycling (Bicycle, Electric bike)
 NET: Public Transport (Bus, Train, Ferry)

▲ Significantly higher than total ▼ Significantly lower than total

Cycling and walking account for almost a third of all trips in a week, but walking has decreased significantly

TRIPS TRAVELLED IN LAST WEEK - SHARE OF TOTAL TRIPS BY MODE
JAN-DEC '22



34% of all recent trips measured were made by active transportation.

Across all recent trips, walking accounts for 28%, this has significantly declined this year. Cycling only accounts for a small percentage of trips.

New Zealanders continue to be reliant on motor vehicles, accounting for half of all weekly trips.

- Private motor vehicle
- Taxi/ride share
- Motorbike or scooter
- Walking
- Cycling (bicycle or e-bike)
- NET: Public transport (bus, train, ferry)
- E-scooter
- Wheeling - Wheelchair / moving around using mobility aids
- Another mode of transport

Q26. Thinking about the past week, how many times did you use each type of transport when traveling for these occasions?
 Base: Total sample: 2021 n= 4924, 2022 n=3278
 *Walking 100m or crossing the road
 Changes to question structure and wording

▲ Significantly higher than 2021 ▼ Significantly lower than 2021

The type of trip people are taking influences their mode of transport

TYPES OF TRIPS TRAVELLED IN THE LAST WEEK – BY MODE TRAVELLED JAN-DEC '22

	TOTAL	Car	Cycle	Walking	Train	Bus	E-scooter
To / from shops	19%	22%	12% ▼	22%	8% ▼	14% ▼	11% ▼
To / from work	23%	23%	21%	22%	28% ▲	34% ▲	41% ▲
To / from visiting friends or family	15%	16%	16%	14%	12%	12%	10%
To / from somewhere else	9%	8%	9%	9%	11%	8%	9%
To / from a place of recreation	8%	8%	10%	9%	7%	9%	6%
As a part of my job	7%	6%	6%	8%	12% ▲	5%	9%
To / from doctor/dentist/pharmacy	6%	6%	7%	7%	5%	7%	3% ▼
Take children to school/day care	5%	7%	4%	5%	5%	2% ▼	2% ▼
To / from school, college, university	6%	4%	16% ▲	5%	12% ▲	9%	9%

More people cycle to travel to and from school, college, and university. But when it comes to going to shops, fewer people use cycling as their mode of transport.

Public transport options are used more for trips to and from work but are used less frequently for trips to and from shops.

Q26. Thinking about the past week, how many times did you use each type of transport when traveling for these occasions? Base: 2021 n=4924, 2022 n=3278
 Trips travelled in last week by mode
 *walking 100m or crossing the road

▲ Significantly higher than total ▼ Significantly lower than total

3

A closer look at walking

TRA

Summary: A closer look at walking

- Walking levels have remained stable since 2021, with close to three-quarters (73%) of urban New Zealanders walking* in the last 12 months.
- Levels of walking differ at a regional level; Wellington and Dunedin have the highest rates of urban walking, as well as a greater proportion of committed walkers who walk as a way to commute most days. Auckland and Hamilton have the lowest levels of urban walking
- Committed walkers (those walking to commute most days) are more likely to be younger and female. Men, however, are over-represented in the non-walker segment, while higher earners and NZ Europeans are under-represented.

*walking 100m or crossing the road



Walkers across New Zealand differ based on the type and frequency of walking

WALKING SEGMENTATION FRAMEWORK

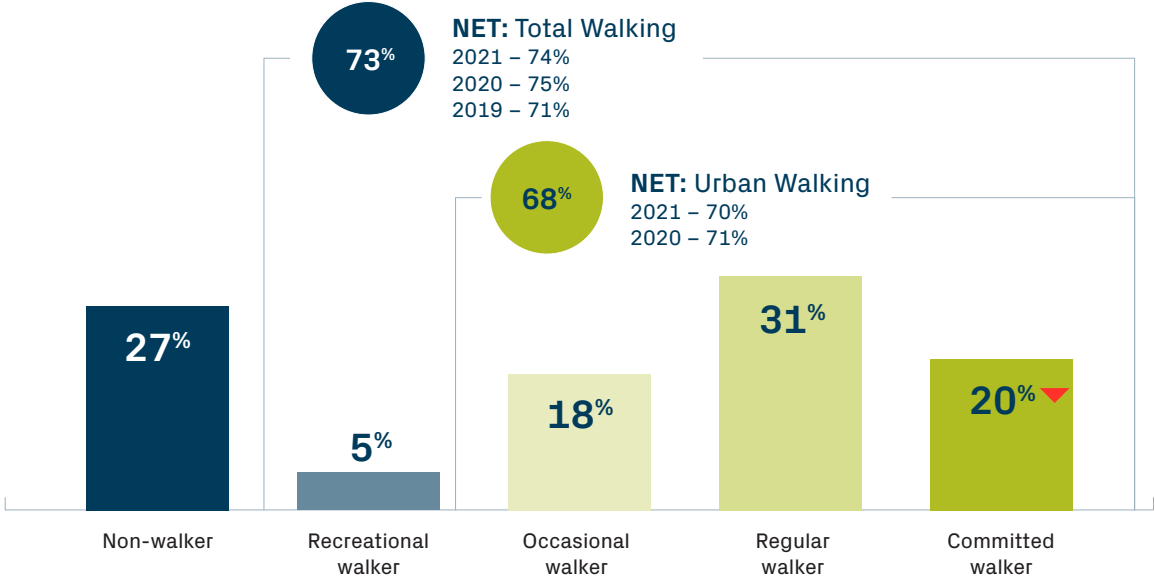


*walk for at least 100m and/or cross the road

Walking is something that majority of New Zealanders engage with



WALKING SEGMENTATION FRAMEWORK – % BASED ON WALKING* IN THE LAST 12 MONTHS JAN-DEC '22



73% of urban New Zealanders choose to walk as a way of getting around.

However, the percentage of people who are committed walkers (walk most days) has significantly declined this year and is now back to Pre-Covid levels.

With most urban New Zealanders walking, the challenge that remains is increasing the frequency of walking by enabling walking as an option to replace trips which would otherwise be taken by vehicle.

	Non-walker	Recreational walker	Occasional walker	Regular walker	Committed walker
2021	26%	5%	17%	31%	22%
2020	25%	5%	20%	30%	21%
2019	29%	Change in response options		24%	20%

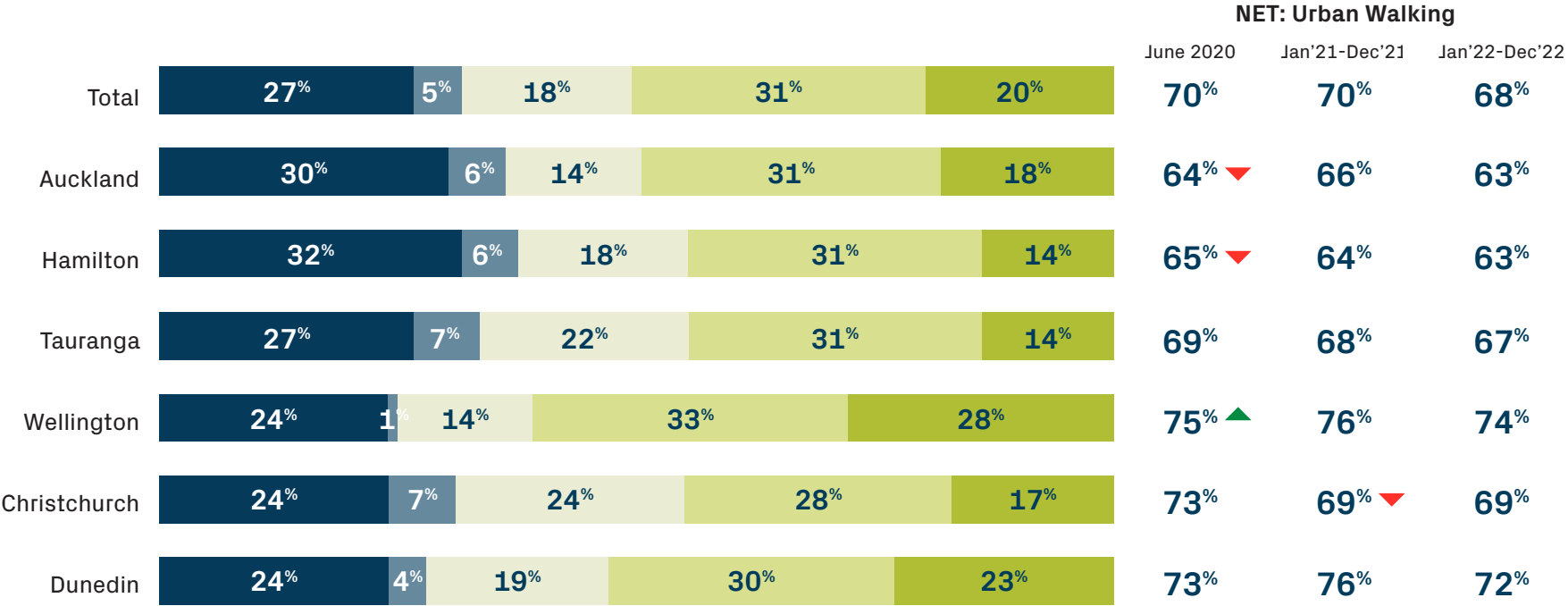
Q23a. Which of the following have you used in the past 12 months?
W2. How often do you travel by foot... To commute to and from work/study, To get around town – to run errands, to go to shops, visit family, friends etc, For recreational purposes.
Base: Total sample, 2020 n=2,256, 2021 n=4,924, 2022 n=3278
*Walk for at least 100m and/or cross the road.
Note: 5% of Non-Walkers use a Wheelchair or other mobility device
Changes made to response options which impact ability to compare recreational walker and occasional urban walker.

▲ Significantly higher than prior year ▼ Significantly lower than prior year



Wellington and Dunedin continue to have the highest levels of walking, while Auckland and Hamilton have the lowest

WALKING SEGMENTATION FRAMEWORK – % BASED ON WALKING* IN THE LAST 12 MONTHS



■ Non-walker
 ■ Recreational walker
 ■ Occasional walker
 ■ Regular walker
 ■ Committed walker

Q23a. Which of the following have you used in the past 12 months?
 W2. How often do you travel by foot... To commute to and from work/study, To get around town – to run errands, to go to shops, visit family, friends etc, For recreational purposes. Base: Total sample, 2020 n=2,256, 2021 n=4924, 2022 n=3278, Auckland n=554, Hamilton n=526, Tauranga n=510, Wellington n=524, Christchurch n=640, Dunedin n=524
 Changes made to response options which impact ability to compare recreational walker and occasional urban walker.

▲ Significantly higher than prior year

▼ Significantly lower than prior year

Committed walkers are more likely to be younger and female



WALKING SEGMENTATION PROFILING -JAN-DEC 2022

	Total	Not currently walking	Recreational walker	Occasional walker	Regular walker	Committed walker
18-34	33%	29%	17% ▼	31%	37% ▲	40% ▲
35-54	34%	35%	28%	37%	32%	33%
55+	33%	36%	55%	32%	31%	28% ▼
Male	48%	53% ▲	48%	50%	47%	43% ▼
Female	51%	47% ▼	52%	50%	52%	56% ▲
Pakeha/NZ Euro	70%	67% ▼	69%	74% ▲	68%	72%
Māori	12%	13%	10%	13%	12%	12%
Pacific	4%	5%	3%	2% ▼	3%	5%
Asian	16%	16%	15%	13% ▼	17%	18%
Less than \$50k	26%	32%	31%	19% ▼	27%	23%
\$50k-\$99k	30%	30%	28%	31%	28%	33%
\$100k or more	33%	27% ▼	28%	37% ▲	34%	34%

Those who are more likely to walk are:

- Younger people (18-34)
- Females

Those not currently walking are more likely than average to be male and less likely to identify as NZ European and have income of \$100k or more.

▲ Significantly higher than total ▼ Significantly lower than total

Q23a. Which of the following have you used in the past 12 months?
 W2. How often do you travel by foot... To commute to and from work/study, To get around town – to run errands, to go to shops, visit family, friends etc, For recreational purposes.
 * Walk for at least 100m and/or cross the road Base: Total 2022 n=3,278 Not currently walking n=858, Recreational walker n=181, Occasional urban walker n=635, Regular urban walker n=999, Committed walker n=605

4

A closer look at cycling

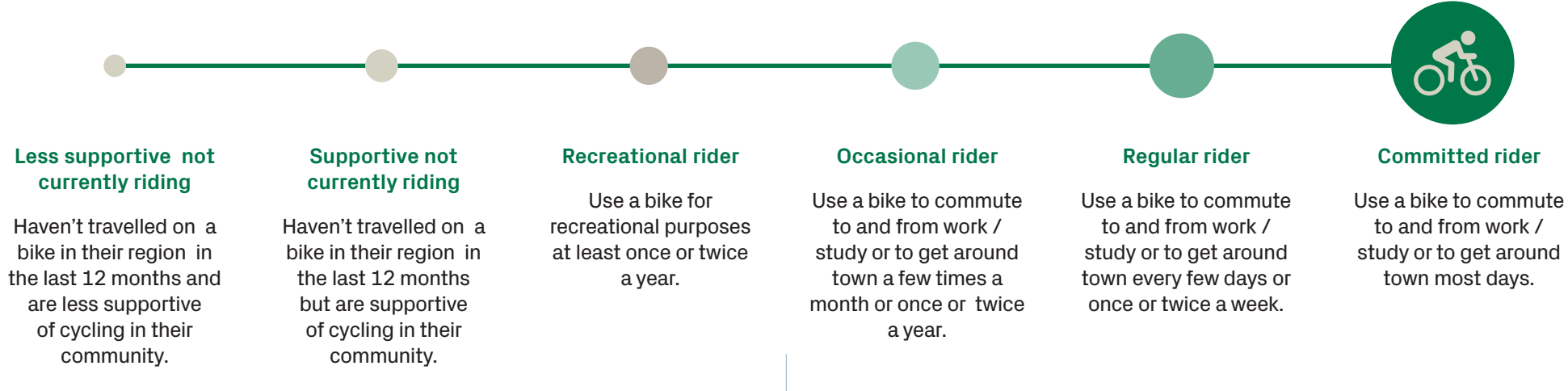
Summary: A closer look at cycling

- Cycling levels amongst urban New Zealanders remains stable from 2021, with one-quarter cycling at least once in the past year and 20% cycling at least occasionally.
- While most urban New Zealanders can ride a bicycle (81%), ownership and access remains lower with half unable to access a bicycle (50%). The lack of access continues to be a major contributor to the three-quarter of urban New Zealanders who have not cycled in the last 12 months.
- Cycling participation has declined significantly in Hamilton, a city with high levels of riding last year.
- Cyclists are mostly supportive of cycling advice, but awareness and adherence to the advice varies.
 - Cyclists generally support blind spot advice for trucks and buses, but awareness is low.
 - Despite high support of sharrow markings, only 1 in 5 cyclist know what they are.
 - Most urban New Zealanders support and understand the importance of 'riding along', but fewer agree the behaviour is done most of the time.



Cyclists across New Zealand differ based on the type and frequency of cycling

CYCLING SEGMENTATION FRAMEWORK



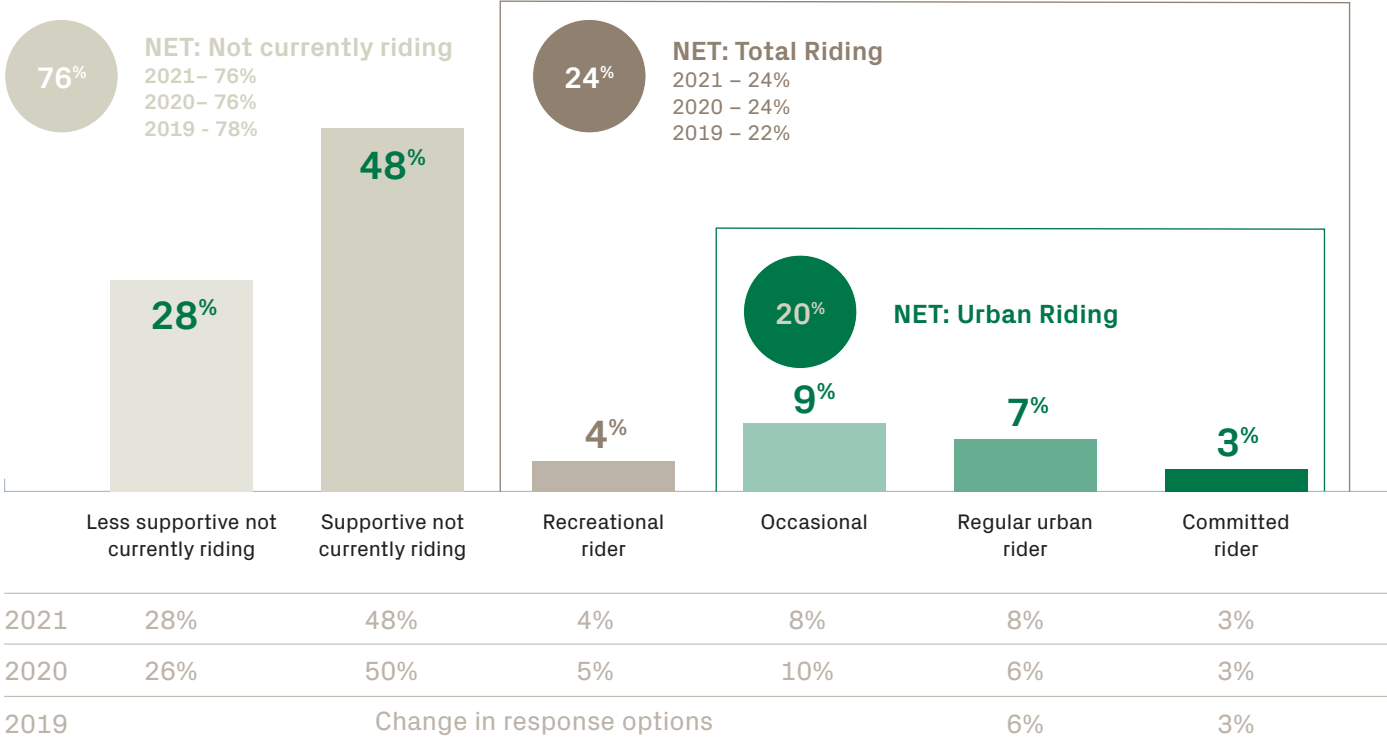
Urban riders

Those who cycle as a way of getting places e.g., to and from work / study or around town.



The levels of urban New Zealanders cycling continues to remain stable, with one-quarter cycling in the past year

CYCLING SEGMENTATION FRAMEWORK – % BASED ON CYCLING IN THE LAST 12 MONTHS JAN-DEC '22



Compared to 2021, overall participation levels in cycling are stable.

Those who haven't cycled in the last 12 months account for three-quarters of urban New Zealanders.

Among non-cyclists, those less supportive of this mode are more likely than average to be aged 55 and over, female and from Wellington.

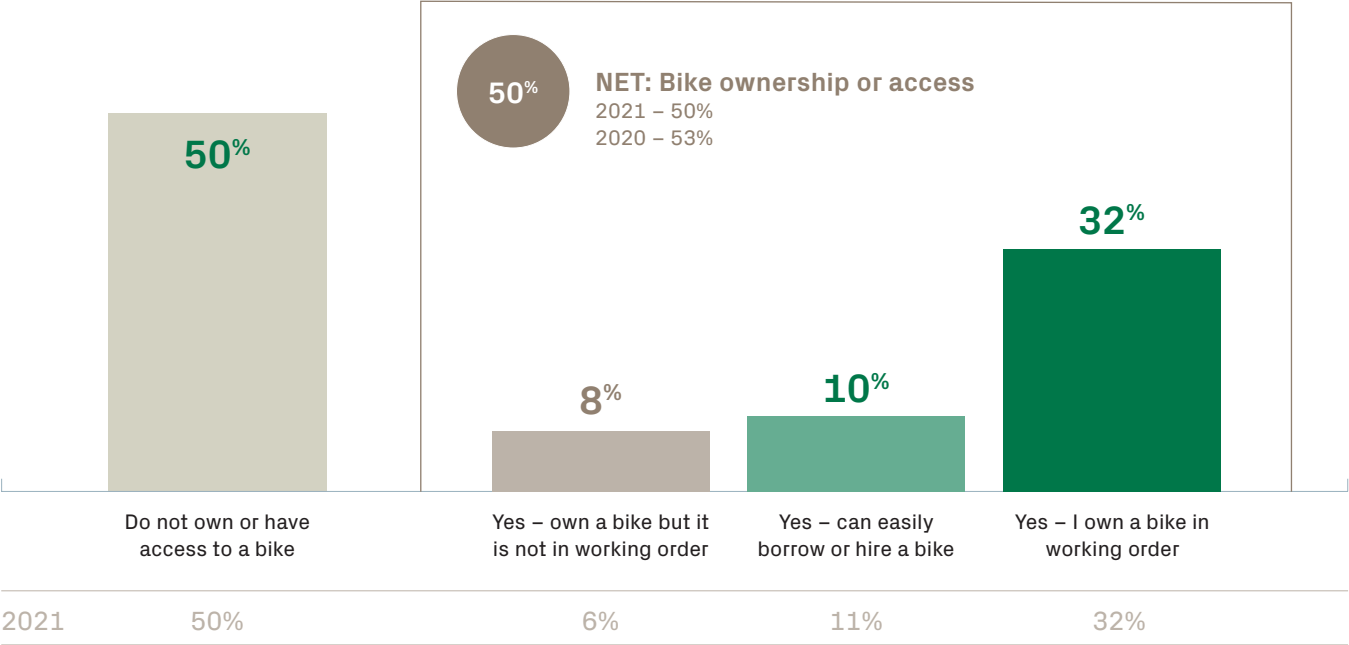
Q23a. Which of the following have you used in [REGION] in the past 12 months? Q6. How often do you currently ride a bicycle or e-bike?
Base: 2021 n=4924, 2022 n=3278
Changes made to response options which impact ability to compare not currently riding, recreational riders and occasional riders

▲ Significantly higher than 2021 ▼ Significantly lower than 2021



Ownership and access remains a challenge to riding for half of all urban New Zealanders

BIKE OWNERSHIP/ACCESS – JAN-DEC'22



Ownership and access to bikes is stable compared to 2021.

Those who own/have access to a bike are more likely to be:

- Between 35-54 (57%)
- Male (57%)
- Living in Christchurch (60%)

Those who don't have access or own a bike are more likely to be:

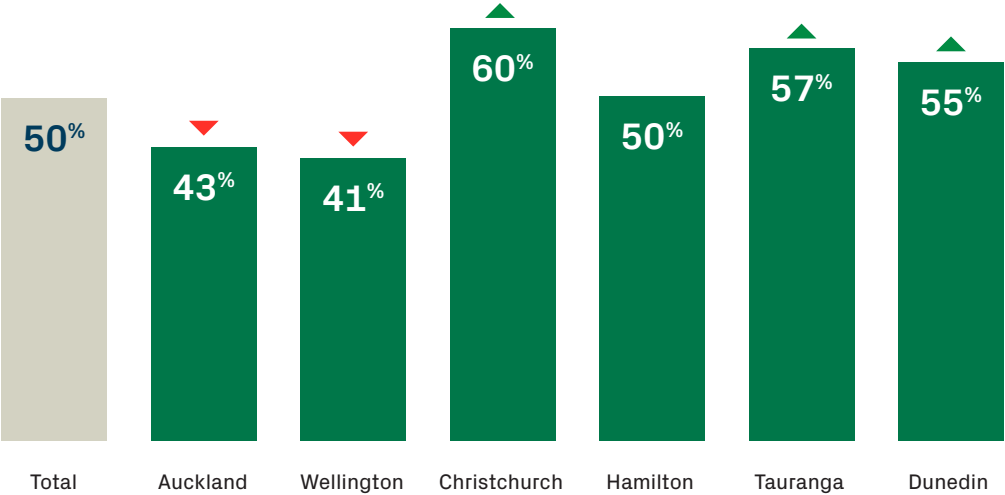
- Over 55 (36%)
- Female (43%)
- Lower income (40%)

Q2: Do you own or have access to a bicycle you could easily use Base: 2021 n=4194, 2022 n=2772
*those who cannot cycle due to a disability are removed from the analysis

People living in Christchurch, Tauranga and Dunedin have higher rates of bike ownership or access



BIKE OWNERSHIP/ACCESS BY REGION – JAN-DEC'22



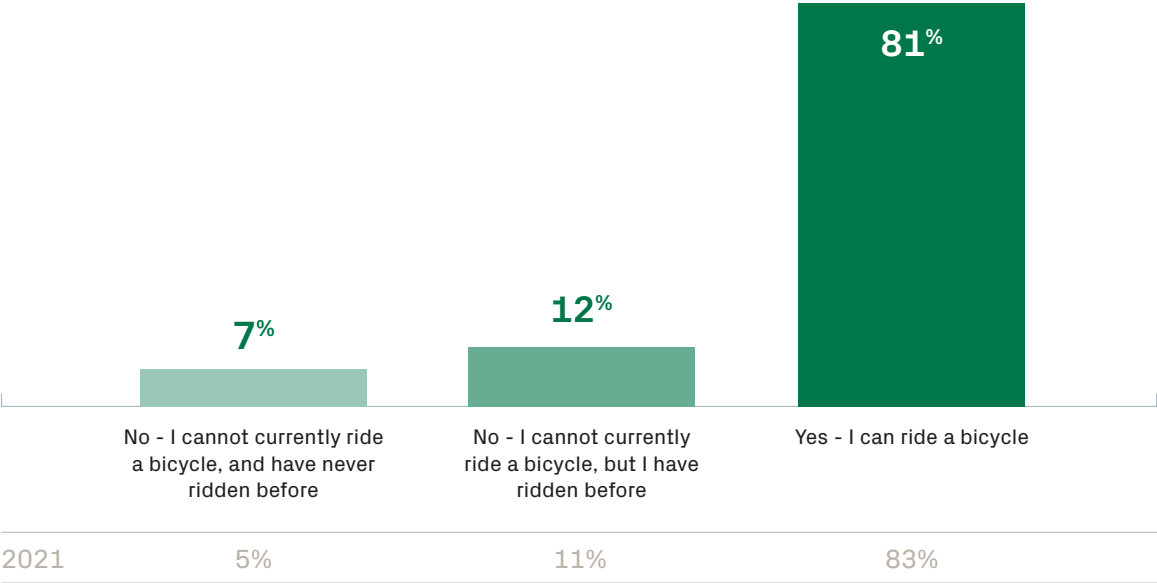
Q2: Do you own or have access to a bicycle you could easily use Base: 2022 n=2772
*those who cannot cycle due to a disability are removed from the analysis

▲ Significantly higher than total ▼ Significantly lower than total



While a majority of New Zealanders can ride a bike, 1 in 5 currently cannot

THE ABILITY TO RIDE A BICYCLE – JAN-DEC'22

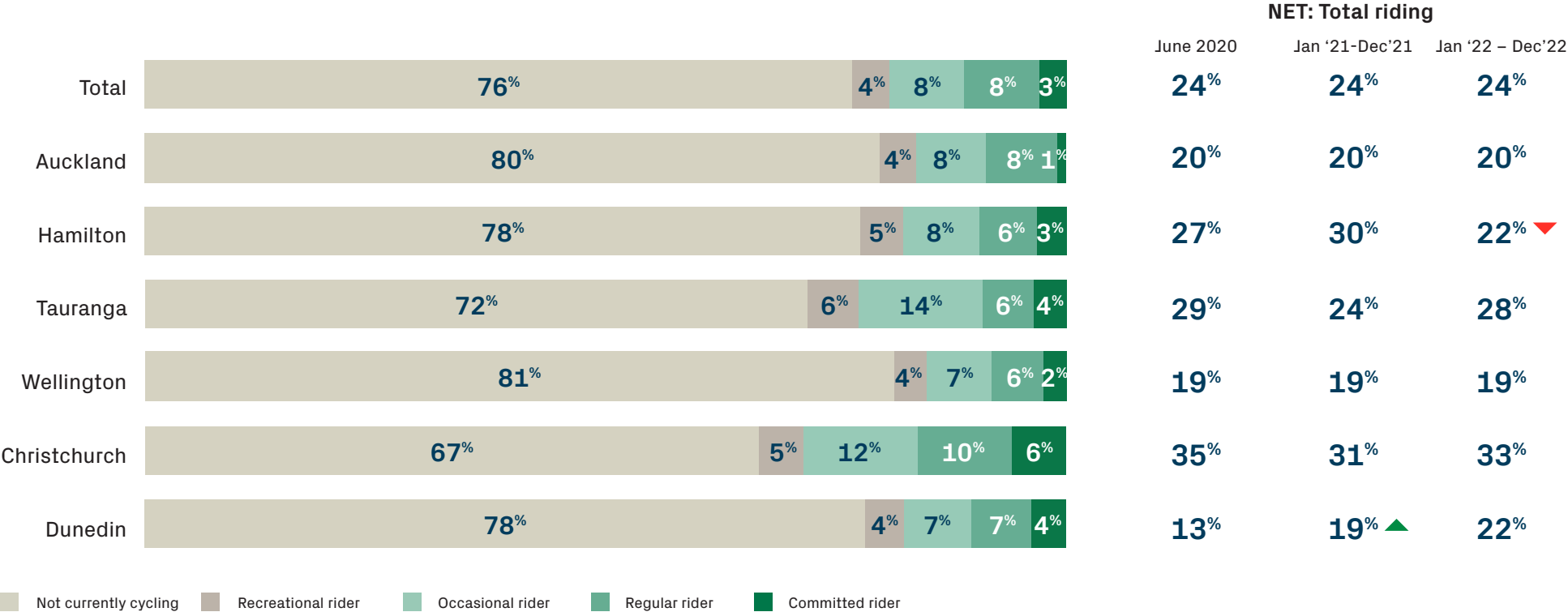


Q2X: Can you ride a bike?
Base: 2021 n=4194, 2022 n=2772



The proportion of people cycling in Hamilton has significantly declined from 2021, while other regions remain stable

CYCLING SEGMENTATION FRAMEWORK – % BASED ON CYCLING IN THE LAST 12 MONTHS



Q23a. Which of the following have you used in [REGION] in the past 12 months? Q6. How often do you currently ride a bicycle or e-bike? Base: 2021 n=4924, 2022 n=3278

▲ Significantly higher than prior reporting period
▼ Significantly higher than prior reporting period

Urban riders who use cycling to commute are more likely to be younger and male



CYCLING SEGMENTATION FRAMEWORK PROFILING – JAN-DEC'22

	Total	Not currently riding	Recreational rider	Occasional rider	Regular rider	Committed rider
18-34	33%	31%	27%	35%	49% ▲	46% ▲
35-54	34%	32%	50% ▲	38%	36%	39%
55+	33%	37% ▲	24% ▼	27% ▼	14% ▼	15% ▼
Male	48%	44% ▼	49%	55% ▲	74% ▲	72% ▲
Female	51%	56% ▲	51%	44% ▼	26% ▼	28% ▼
Pakeha/NZ Euro	70%	70%	76%	75% ▲	58% ▼	69%
Maori	12%	11%	8%	16%	18%	18%
Pacific	4%	4%	1% ▼	2% ▼	5%	3%
Asian	16%	16%	13%	14%	25% ▲	12%
Less than \$50k	26%	28%	22%	18% ▼	23%	17% ▼
\$50k-\$99k	30%	29%	27%	33%	33%	28%
\$100k or more	33%	30% ▼	37%	39% ▲	39%	47%

Younger people (18-34) and males are more likely to cycle.
Older people (55+) and females are less likely to cycle.

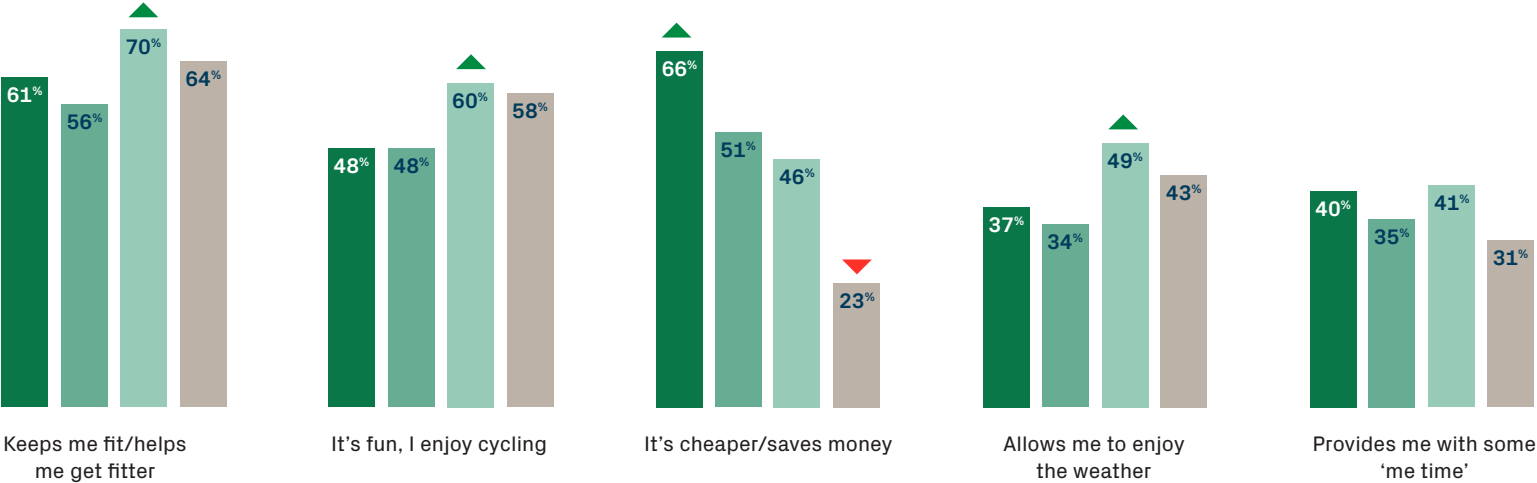
▲ Significantly higher than total ▼ Significantly lower than total

Q23a. Which of the following have you used in [REGION] in the past 12 months? Q6. How often do you currently ride a bicycle or e-bike? Base: 2021 n=4924, 2022 n=3278
Changes made to response options which impact ability to compare not currently riding, recreational riders and occasional riders



Keeping fit and enjoyment are larger motivators for Occasional Riders

CYCLING ENABLERS – TOP 5



Committed riders are significantly more likely to cycle to save money.

■ Committed rider
 ■ Regular rider
 ■ Occasional rider
 ■ Recreational rider

Q11a. From the list below, what are the key reasons you choose to cycle?
 Base, Committed Commuter n=90, Regular Urban Rider n=195, Occasional Urban Rider n=307, Recreational Cyclist n=139

▲ Significantly higher than total
 ▼ Significantly lower than total

One-third of cyclists identify as leisure cyclists



CYCLIST ASSOCIATIONS – JAN-DEC'22

Leisure Cyclist



Casual Cyclist



Regular Commuter



Faster Commuter



Family Group



Road Cyclists



School Student



Group Road Cyclist



Across age groups there are differences in cyclist associations. Leisure and casual cyclists are more likely to be 55+, whereas regular cyclists and road cyclists are more likely to be 18-34. Family group cyclists are most likely to be between 35-54.

The number of cyclists identifying as student cyclists remains low as the research only surveys those aged 15 years and above.

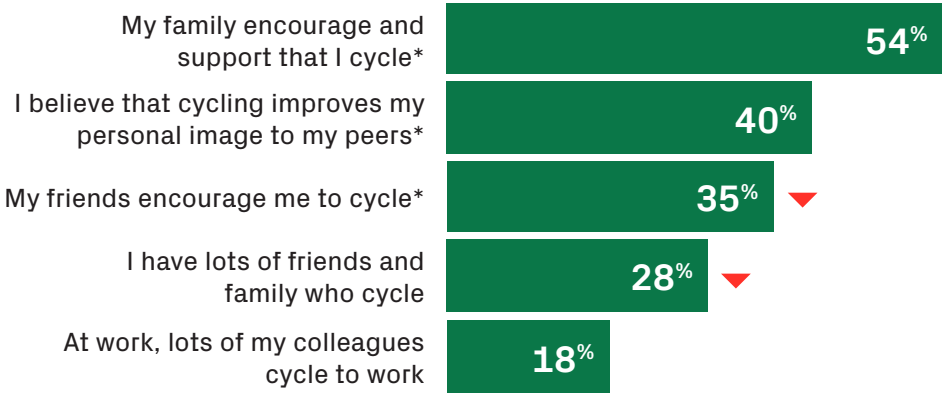
Q18. Below are some images of cyclists. Which of the following would best relate to the type of cyclist you are?
 *This question was not asked in 2020.
 Base: Total cyclists n=1180

▲ Significantly higher than prior reporting period ▼ Significantly higher than prior reporting period



Over half of people (54%) feel encouraged and supported by their family to cycle

SOCIAL PERCEPTIONS - % STRONGLY AGREE / AGREE - JAN-DEC 2022



	2021	June 2020
My family encourage and support that I cycle*	57%	58%
I believe that cycling improves my personal image to my peers*	41%	36%
My friends encourage me to cycle*	42% ▲	38%
I have lots of friends and family who cycle	32%	33%
At work, lots of my colleagues cycle to work	20%	18%

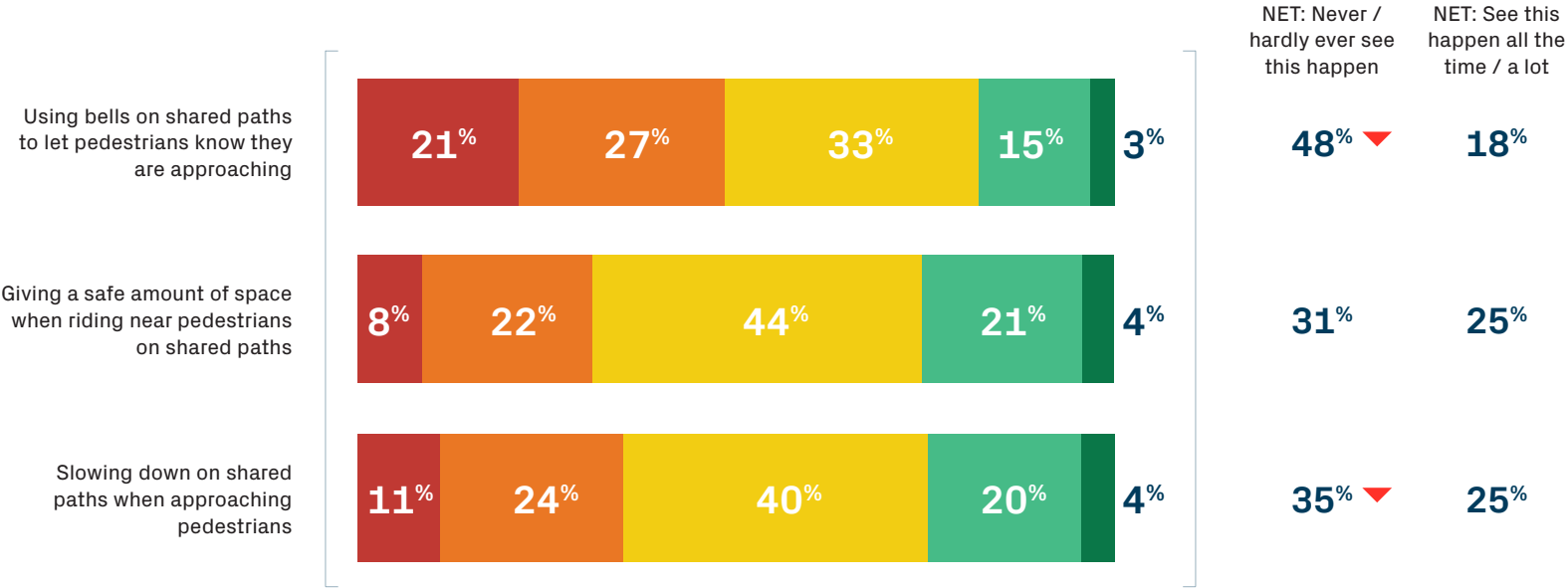
Q8 - How much do you agree or disagree with each of the following statements?
 Base: 2022 Total Sample n=3278 2021 Total Sample n=4924, 2020 Total sample n=2,256 *2022 Asked of Cyclists n=759,
 *2021 Asked of cyclists n=1,180 * 2020 Asked of cyclists n=567.

▲ Significantly higher than prior reporting period
 ▼ Significantly higher than prior reporting period



Correct use of shared paths is infrequently observed by urban New Zealanders

POSITIVE SHARED PATH BEHAVIOURS FROM CYCLISTS – JAN – DEC 2022



Urban riders (those who cycle as a way of getting places) are more likely to observe cyclist giving a safe amount of space to pedestrians and slowing down when approaching pedestrians on shared paths.

■ I never see this happen
 ■ I hardly ever see this happen
 ■ I see this happen a little
 ■ I see this happen a lot
 ■ I see this happen all the time

Q22 - How often do you see the following behaviour on the road, or shared path, from cyclists? I see this happen all the time + a lot Base: Total Sample n=3,278

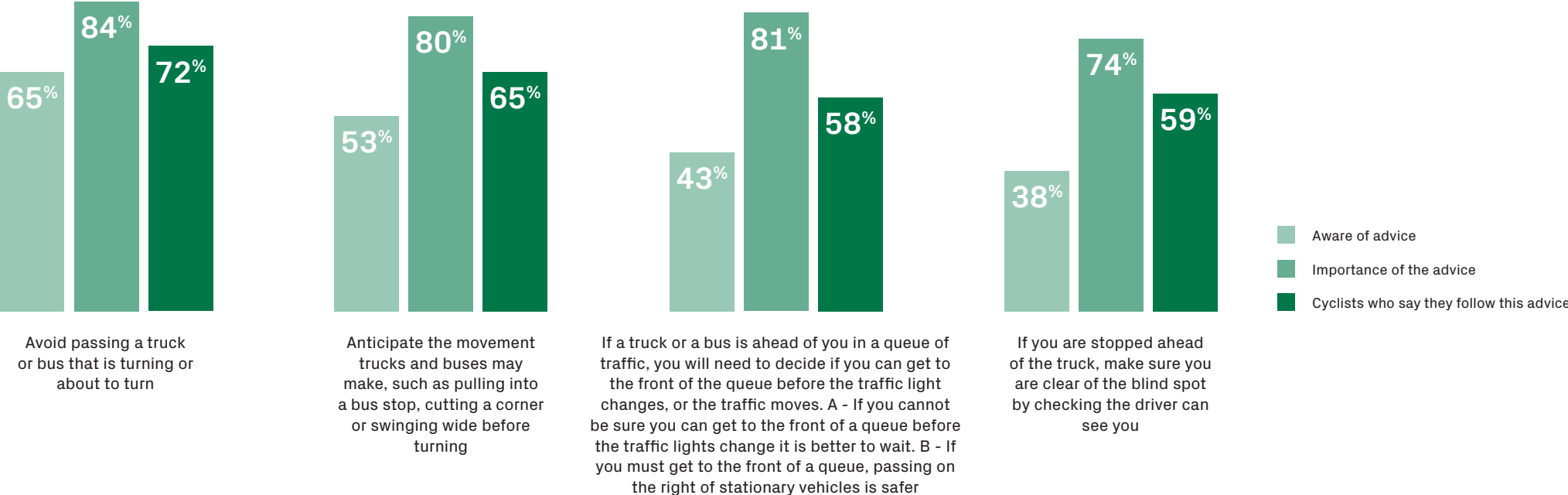
▲ Significantly higher than 2021

▼ Significantly lower than 2021



Whilst cyclists see the importance of blind zone advice for trucks and buses, fewer are aware of or follow the advice

CYCLISTS PERCEPTIONS OF BLIND ZONE ADVICE FOR TRUCKS AND BUSES – JAN – DEC 2022



Q30a. How aware were you of this advice or best practice?
 Q30b. And how important do you think it is that cyclists follow this guidance?
 Q31. And now thinking about when you cycle, do you follow this advice?
 Base: Oct'21 – Mar'22 n=1650



There is high support for Sharrow Markings despite low awareness and understanding of them



Sharrow markings indicated a shared traffic environment where cyclists may be safer if they travel near the centre of the lane, signals to drivers that people on bikes are likely to do this, and that they are doing so to keep everyone safe. For example a sharrow might be placed when approaching an urban roundabout as cyclists are taught to position themselves in the centre of the lane so; drivers on the roundabout are more likely to see them; and drivers following the cyclists must wait behind the cyclist's, instead of overtaking them. Pulling alongside cyclists makes them invisible to drivers on the roundabout, it has also resulted in cyclists being killed by left turning trucks.

Before today, have you seen the sharrow marking in your city?
Before today, did you know what the sharrow marking meant?
To what degree do you support more sharrow markings being installed at roundabouts to encourage more cyclists to ride in the centre of the lane when entering, and navigating roundabouts?
To what degree do you support drivers being encouraged to give space for a cyclist who is moving toward the centre of the lane at a roundabout?
Base: Apr'22 – Sep'22 n=1662

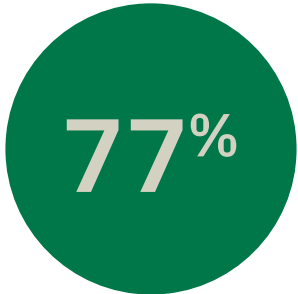
SHARROW MARKINGS KNOWLEDGE



SHARROW MARKING SUPPORT



Support more sharrow markings being installed at roundabouts to encourage more cyclists to ride in the centre of the lane when entering, and navigating roundabouts



Support drivers being encouraged to give space for a cyclist who is moving toward the centre of the lane at a roundabout



Whilst there is high support for riding along, it is not often adopted or observed amongst cyclists

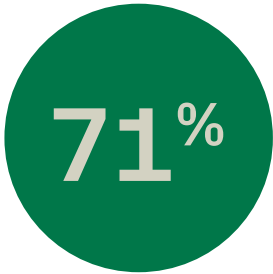


In the official code for cycling NZTA encourages cyclists to position themselves to be seen. This means only riding as far left as it is safe to do so. Often this will be out from the kerb away from roadside debris in a position where you can see the road ahead and drivers can see you. This is called the “riding along” position. It is where you should normally ride unless you need to move toward the centre of the lane to “take the lane” to avoid car doors, or at intersections to be clearly visible to following or turning traffic.

RIDING ALONG (MOST/ALL OF THE TIME)



RIDING ALONG SUPPORT AND IMPORTANCE



Support cyclists being encouraged to ride along unless taking the lane



Importance for cyclists to take the ride along position

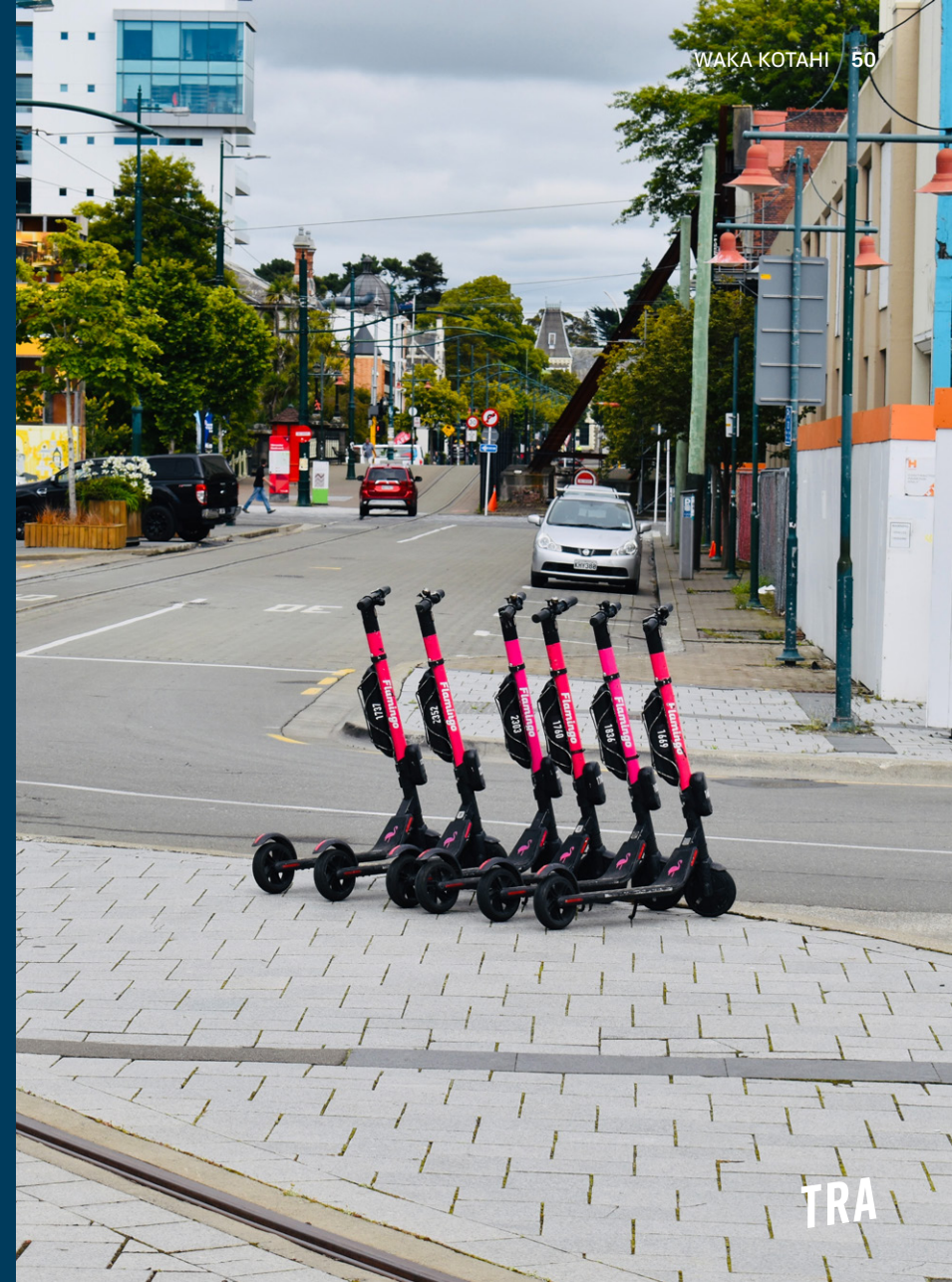
How often do you see cyclists 'riding along'?
When cycling in cities how often do you use the 'riding along' position?
And, how important do you think it is for cyclists to take the "riding along" position?
To what degree do you support cyclists being encouraged to use the 'riding along' position, unless 'taking the lane'?
Base: Apr'22 – Sep'22 n=1662

5

A closer look at Micro-mobility

Summary: A closer look at Micro-mobility

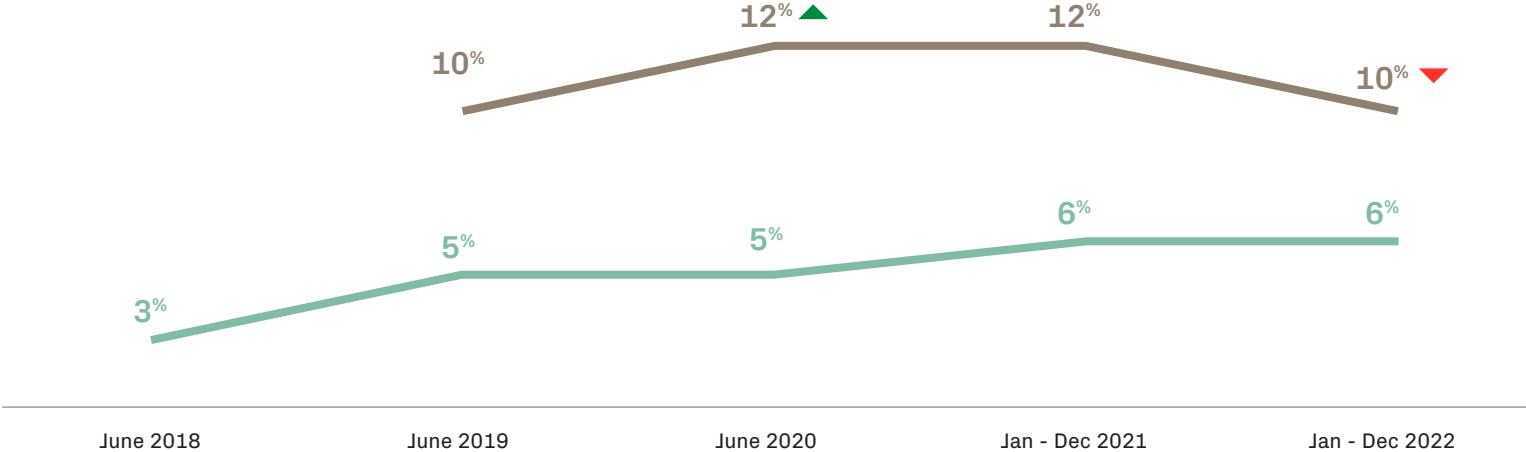
- Annual E-scooter usage has declined since last year, with 1 in 10 urban New Zealanders using a E-scooter in 2022. E-bike usage remains stable, with 6% of urban New Zealanders using an E-bike in 2022.
- However, the amount of frequent weekly users for both modes have remained stable over the last few years.
- There is greater use of E-scooters and E-bikes amongst younger and male urban New Zealanders. Weekly users of E-scooters over-index for those of Asian ethnicity.
- E-bike usage is highest in Tauranga while E-scooters usage is highest in Hamilton and Christchurch.





E-scooter usage has declined since 2021, whilst E-bike usage has held stable

MICRO MOBILITY USAGE IN PAST 12 MONTHS



■ E-Bike ■ E-Scooter

Q23a. Which of the following have you used in the past 12 months?
2021 n=4924, 2022 n=3278
E-scooters were not included in 2018 survey

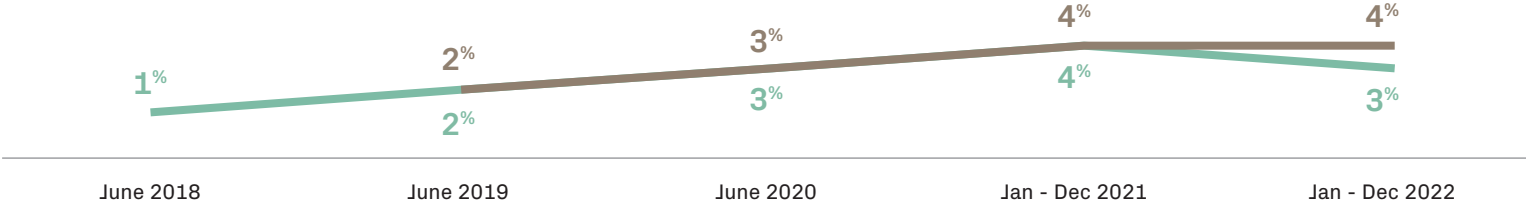
▲ Significantly higher than previous period

▼ Significantly lower than previous period



Weekly usage remains stable, with a small proportion of urban New Zealanders using E-bikes and E-scooters on a weekly basis

MICRO MOBILITY USAGE AT LEAST ONCE A WEEK



E-Bike E-Scooter

Q24. On average, how often do you use each of the following modes of transport, for any reason
2021 n=4924, 2022 n=3278
E-scooters were not included in 2018 survey



E-bike and E-scooter usage both skew towards younger people (18-34) and males

E-BIKE AND E-SCOOTER PROFILING JAN-DEC 2022

	E-BIKE			E-SCOOTER	
	TOTAL	WEEKLY	LAST 12M	WEEKLY	LAST 12M
18-34	33%	45% ▲	42% ▲	73% ▲	66% ▲
35-54	34%	21% ▼	27%	25%	29%
55+	33%	34%	30%	2%	5%
Male	48%	67% ▲	57% ▲	67% ▲	56% ▲
Female	51%	33% ▼	43% ▼	33% ▼	44% ▼
Pakeha/NZ Euro	69%	62%	65%	56% ▼	67%
Maori	10%	19%	15%	17%	16%
Pacific	2%	1%	3%	8%	6%
Asian	15%	15%	18%	27% ▲	17%
Less than \$50k	27%	20%	26%	19%	19%
\$50k-\$99k	31%	30%	27%	42%	30%
\$100k or more	30%	41%	39%	33%	42% ▲

E-bike users are significantly more likely to be:

- Male
- Under 35

E-scooter users are significantly more likely to be:

- Under 35
- Male
- From higher earning households

Among weekly users, the skew toward male users is particularly pronounced.

Q23a. Which of the following have you used in the past 12 months?
E-scooters 2022 n=299, E-bike 2022 n=206

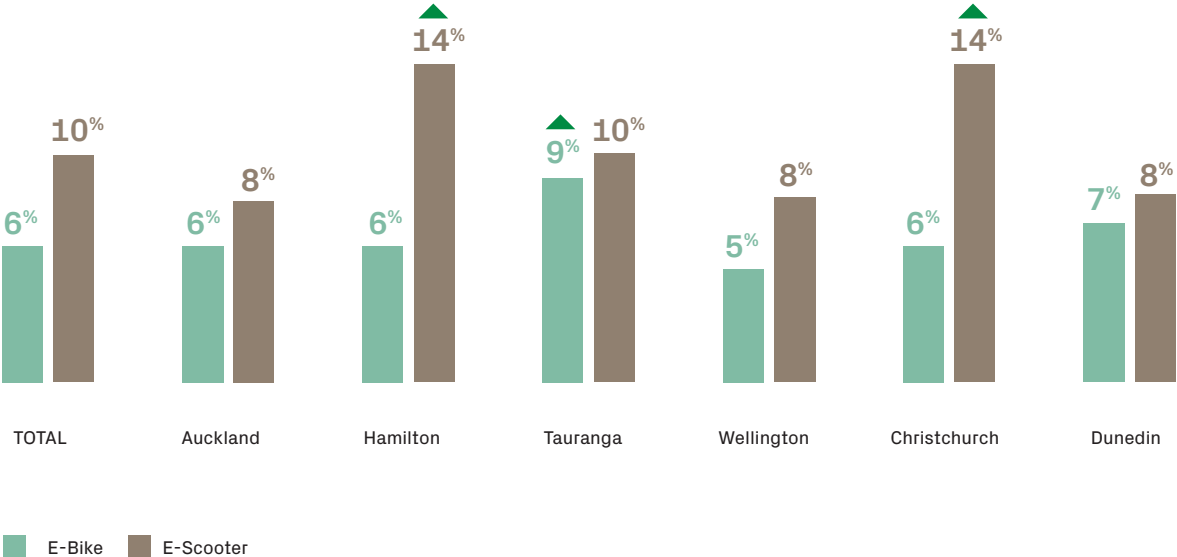
Q24. On average, how often do you use each of the following modes of transport, for any reason Base: 2022 E-scooters n=92, E-bikes n=105

▲ Significantly higher than total ▼ Significantly lower than total



Christchurch and Hamilton have the highest levels of E-scooter usage

MICRO MOBILITY USAGE ACROSS REGIONS - JAN-DEC'22



Compared to 2021 E-scooter usage has significantly declined within Wellington (-3), Christchurch (-4), and Dunedin (-4).

Compared to 2021 E-bike usage has significantly declined in Hamilton (-3), but has significantly increased in Tauranga (+4).

▲ Significantly higher than total
▼ Significantly lower than total

Q23a. Which of the following have you used in the past 12 months?
2022 n=3278

6

Support for walking and cycling

TRA

Summary: Support for Active Modes

- Lower use of active modes in 2022 compared to 2021 coincides with a softening in perceptions that walking and cycling are great ways to get around town. These perceptions are lower during Winter months.
- There remains strong support for cycling and walking, but support has softened overtime for cycling. The greatest decline in support for cycling is in Hamilton, a city which previously had the highest support.
- Support and satisfaction with infrastructure remains high. Urban New Zealanders understand the importance of this investment to encourage more people to use active modes for exercise or transport options.
- Despite high support for infrastructure that supports active mode use, both support for cycling infrastructure and Tactical Urbanism Infrastructure Projects have declined across time.



Most people view walking and cycling as an easy and effective mode of transport, but this has been declining in recent years

PERCEPTIONS OF WALKING & CYCLING - % STRONGLY AGREE / AGREE

69% (-3) ▼

Walking is a great way to get around town easily and efficiently

2021 72%
2020 73%



54% (-2)

Cycling is a great way to get around town easily and efficiently

2021 56%
2020 60%
2019 67%

Support is lowest among

- 35-54 (66%, -6 vs 2021)
- Males (67%, -1 vs 2021)
- Auckland (64%, -5 vs 2021)
- Hamilton (59%, -8 vs 2021)

Support is lowest among

- 55+ (47%, -3 vs 2021)
- Females (52%, -2 vs 2021)
- Auckland (50%, = vs 2021)

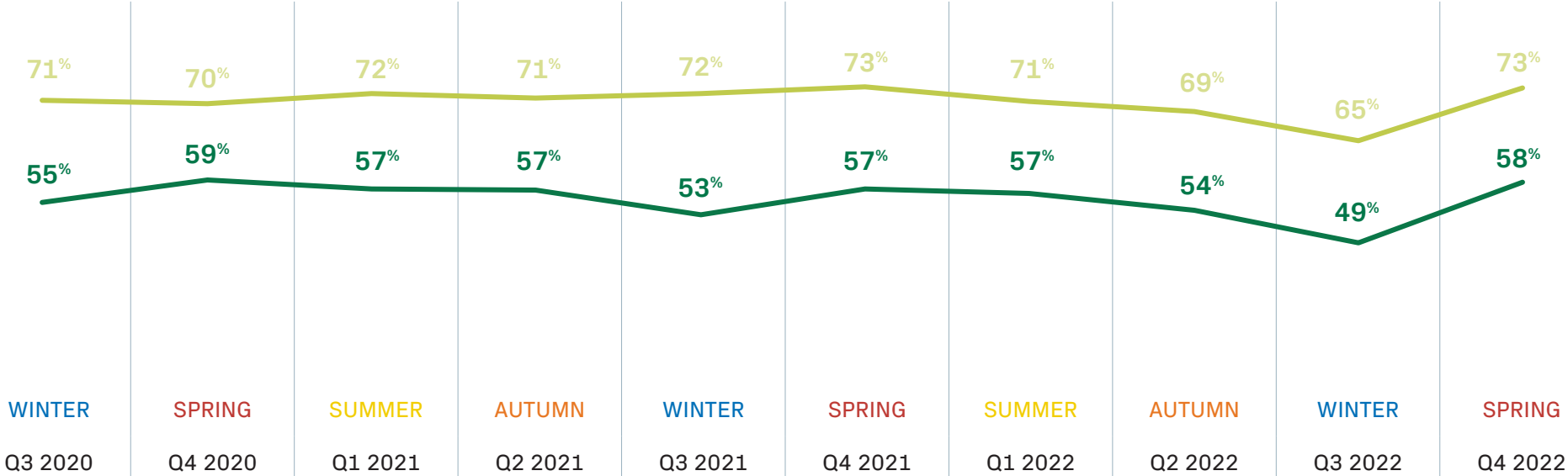
Q7 - Now please tell us how much you agree or disagree with the following statements (Strongly agree + agree)
Base Jan-Dec 2022 n=3278, Jan-Dec 2021 n= 4924, June 2020 n=2267

▲ Significantly higher than 2021 ▼ Significantly lower than 2021

With perceptions dropping in the winter months in 2022



PERCEPTIONS OF WALKING & CYCLING - % STRONGLY AGREE / AGREE – Q3 2020– Q4 2022



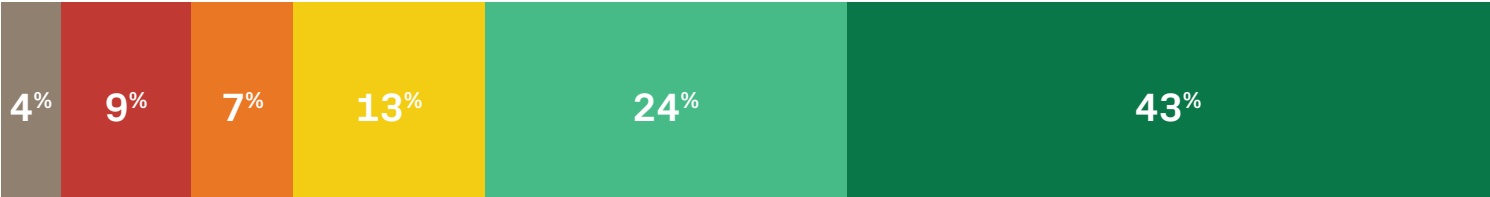
Walking is a great way to get around town easily and efficiently Cycling is a great way to get around town easily and efficiently

Q7 - Now please tell us how much you agree or disagree with the following statements (Strongly agree + agree)
Base Jan-Dec 2022 n=3278, Jan-Dec 2021 n= 4924, June 2020 n=2267



Whilst public support of walking and cycling remains high, this support has softened overtime

SUPPORT OF CYCLING IN THE COMMUNITY



NET: SUPPORTIVE(6-10)

June 2018	June 2019	June 2020	Jan-Dec 2021	Jan-Dec 2022
73%	71%	71%	68%	68%

SUPPORT OF WALKING IN THE COMMUNITY



Jan-Dec 2021	Jan-Dec 2022
89%	87%

Don't know
 Very unsupportive(0-2)
 Unsupportive(3-4)
 Neutral(5)
 Supportive(6-7)
 Very supportive(8-10)

Q6c: There are varying levels of support in the community for people who choose to cycle for journeys such as traveling to work, going to shops or other activities. To what degree do you support cycling in your community Base: Jan-Dec'2022 n= 3278, Jan-Dec'2021 n=4924
 Q6d: Now thinking about walking and people who choose to walk for journeys such as travelling to work, going to shops or other activities. To what degree do you support walking in your community? : Jan-Dec'2022 n= 3278 Jan-Dec'2021 n=4942
 Q6d added in 2021, Question order changed in 2020.

Support for cycling has significantly decreased in Hamilton



SUPPORT OF CYCLING IN THE COMMUNITY (NET: SUPPORTIVE 6-10)

	Jun-18	Jun-19	Jun-20	Jan-Dec 2021	Jan-Dec 2022
Total	73%	71%	70%	68%	68%
Auckland	69%	68%	68%	64% ▼	67%
Hamilton	77%	70% ▼	78% ▲	72% ▼	65% ▼
Tauranga	77%	73%	78%	69% ▼	69%
Wellington	74%	72%	71%	69%	69%
Christchurch	72%	73%	68%	70%	69%
Dunedin	73%	70%	68%	69%	65%

O6c: There are varying levels of support in the community for people who choose to cycle for journeys such as traveling to work, going to shops or other activities. To what degree do you support cycling in your community? Base: Auckland n=554, Wellington n=524, Christchurch n=640, Hamilton n=526, Tauranga n=510, Dunedin n=524 No change to question wording and response options. Question order changed

▲ Significantly higher than previous period

▼ Significantly lower than previous period



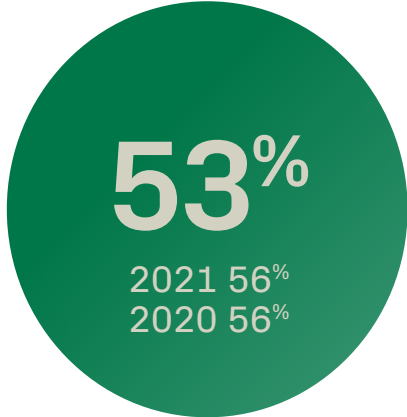
Support for investment in cycling infrastructure has also softened slightly, but over half still think it is important



Investing in cycle lanes is important because it gives people more travel options



Investing in cycle lanes is important because it gets people outside exercising



The opening of cycle ways/ paths has encouraged me to cycle more (CYCLISTS ONLY)

Q7 - Now please think about walking and cycling in general. How much do you agree or disagree with each of the following statements?
Base Jan-Dec 2022 n= 3278

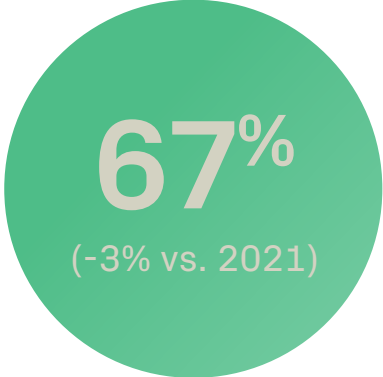
▲ Significantly higher than previous period

▼ Significantly lower than previous period

Just under 7 in 10 people are aware of at least one Tactical Urbanism project

Some New Zealand cities have been undertaking temporary low-cost infrastructure projects or pop up events that transform urban spaces in creative ways and make it easier or safer for people to walk, cycle, or scoot. These types of projects are called Tactical Urbanism.

AWARENESS OF TACTICAL URBANISM INFRASTRUCTURE PROJECTS IN THEIR REGION OCT-DEC '22

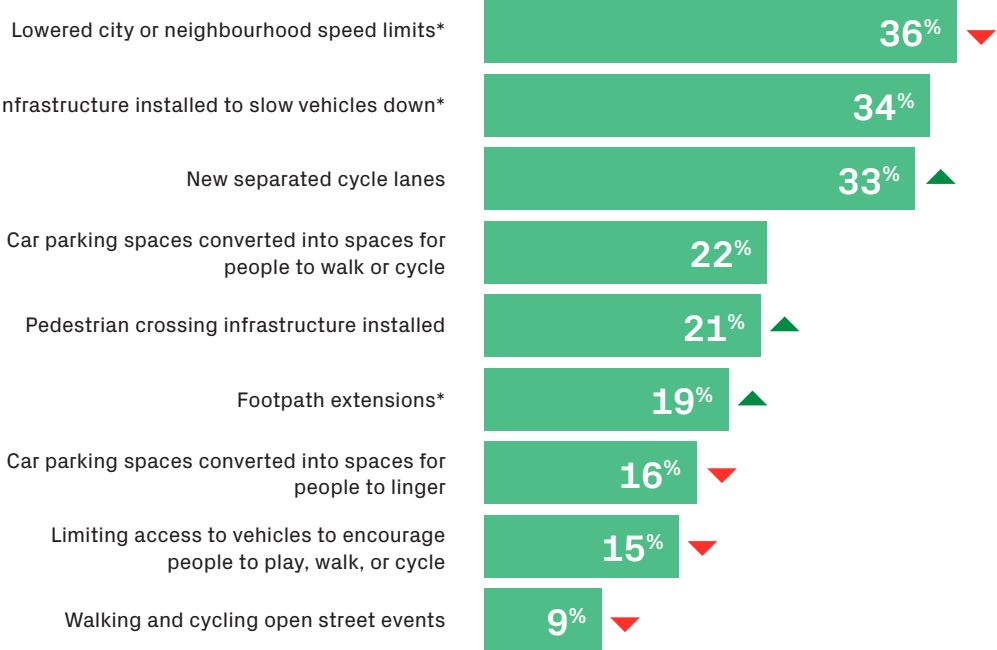


Overall awareness of Tactical Urbanism projects has declined this year. But still just under 7 in 10 urban New Zealanders are aware of at least one project. This figure rises significantly in Dunedin (84%) and Tauranga (76%).

Top 3 ways of finding out about projects:

- I drove in the area and saw it (49%)
- I walked in the area and saw it (32%)
- News reports/articles (21%)

TACTICAL URBANISM PROJECTS AWARENESS



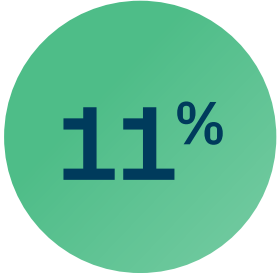
▲ Significantly higher than previous period ▼ Significantly lower than previous period

Q16. Thinking about Tactical Urbanism infrastructure projects, which of the following projects in [REGION] are you aware of that has happened, over the last 12 months, or is currently happening? This can be in your neighbourhood, town, city centre.
Base 2021 n=904, 2022 n=782
*Change from "lowered speed limits" to "lowered city or neighborhood speed limits" in 2022
*Change from "footpath extensions (without reducing carparks)" to "footpath extensions" in 2022
*Change from "New separated cycle lanes (without reducing carparks)" to "New separated cycle lanes" in 2022
*Change from "temporary infrastructure installed to slow vehicles down" to "infrastructure installed to slow vehicles down" in 2022

Whilst most are supportive of these projects, this has declined significantly since 2020

SUPPORTIVE OF TACTICAL URBANISM INFRASTRUCTURE PROJECTS IN THEIR REGION OCT-DEC '22

Total	66%	Compared to the same quarter in 2020 (Oct-Dec) this has significantly declined (-7%)
Auckland	65%	
Hamilton	67%	
Tauranga	69%	
Wellington	69%	
Christchurch	59%	
Dunedin	71%	



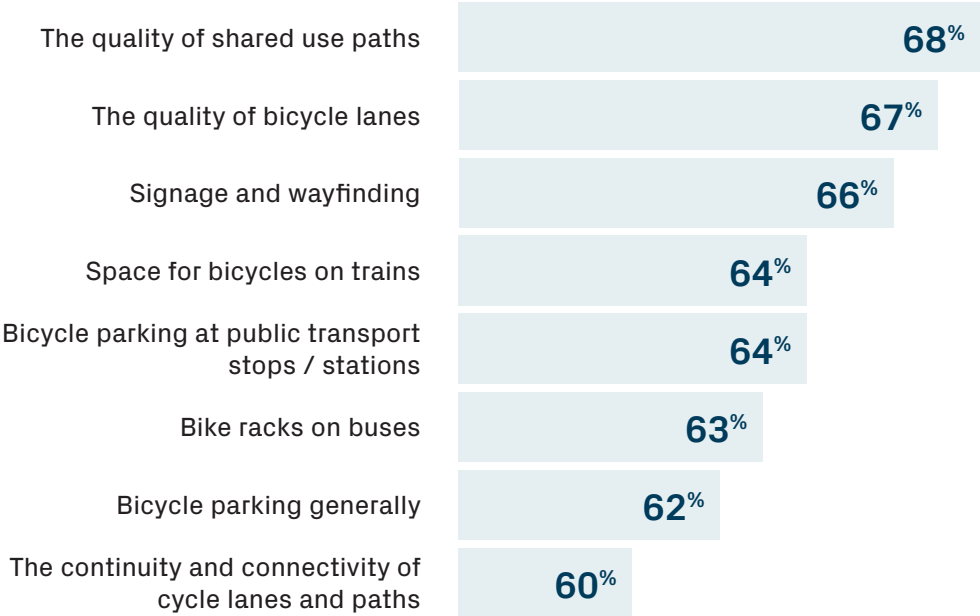
11% of people have provided feedback relating to a tactical urbanism project in the past 12m, this is highest in Dunedin (18%) and Hamilton (15%).

Q16. Thinking about Tactical Urbanism infrastructure projects, which of the following projects in [REGION] are you aware of that has happened, over the last 12 months, or is currently happening? This can be in your neighbourhood, town, city centre.
Base 2021 n=904, 2022 n=782

Despite softening support of cycling infrastructure, satisfaction with current infrastructure remains steady



CYCLIST SATISFACTION WITH CYCLING INFRASTRUCTURE – % SATISFIED (5-7) – JAN-DEC 2022



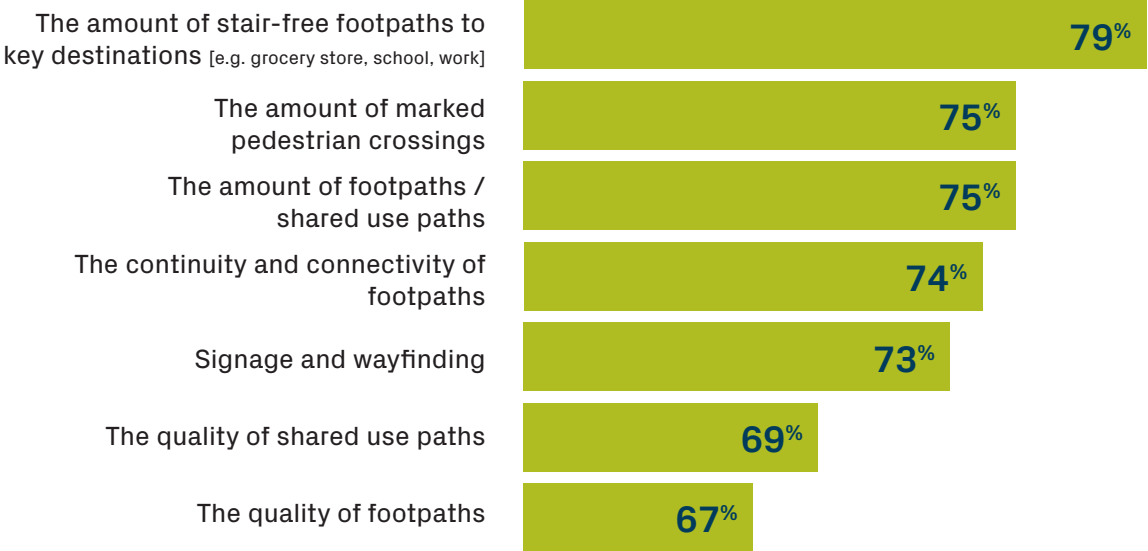
Satisfaction with cycling infrastructure remains steady compared to 2021.

Q29b - Now please think about cycling infrastructure in [REGION]. How satisfied are you with...?
Base: Total Cyclist n=759
*don't know excluded from analysis



Satisfaction with walking infrastructure was also maintained in 2022

SATISFACTION WITH WALKING INFRASTRUCTURE - % SATISFIED (5-7)



Satisfaction with walking infrastructure remains steady compared to 2021.

Q29c - Now thinking about pedestrian infrastructure in [REGION].How satisfied are you with...? Base: Total n=2,405 *don't know excluded from analysis

▲ Significantly higher than 2021 ▼ Significantly lower than 2021

7

**Opportunities to increase
the number of people
walking and cycling**

TRA

Summary: Walking

- Barriers to walking remain consistent over time and centered around safety, ease and access, and logistics. The largest barriers are not feeling safe walking in the dark and walking not being a quick way to get places.
- Safety in the dark is a greater barrier in Hamilton. The time walking adds to a journey is a more prominent barrier in Hamilton and Christchurch, while walking not being a quick way to get places is also a greater barrier in Christchurch.
- While 8 in 10 feel safe walking, this perception has continued to decrease year on year.
- The largest motivators to walk are personal factors, such as providing fitness, enjoyment and 'me time'. Saving money is also an important motivator which has significantly increased since 2021.



Summary: Cycling

- The largest barriers to cycling continue to centre around safety and logistics. The most prominent barrier is not feeling safe because of how people drive. However, in terms of safety, fewer feel that both cycling in the dark and the speed of other road users are a barrier to cycling.
- Safety in the dark is a greater barrier in Hamilton, while the speed of other road users is a larger barrier in Tauranga.
- Overall safety perceptions for cycling have declined 4% since 2021, with half of urban New Zealanders (51%) perceiving cycling as safe. However, this remains significantly greater than pre-Covid levels in 2019. Christchurch has the highest safety perceptions for cycling.
- The decline in safety perceptions from 2021 has occurred across a wide range of cycling locations. Even those that feel safest cycling, the urban riders, are seeing declines in safety perceptions on public roads with no cycle lanes or painted cycle, on shared paths or cycle paths, and in reduced speed zones.
- The main cycling motivators are largely personal, such as keeping fit and enjoyment – although, the ability to save money is also a key enabler.





The largest barriers to walking remain centered around safety, ease and access, and logistics

BARRIERS TO WALKING – JAN-DEC 2022

SAFETY 

33% (+1)


I don't feel safe walking in the dark

EASE AND ACCESS 

30% (=)
Walking is not a quick way for me to get where I need to go

27% (=)
I live too far away for it to be practical

25% (=)
Walking adds too much time to my journey

LOGISTICS 

28% (+1)
I always have too much to carry

25% (=)
It's not enjoyable because of the weather

The barriers show a consistent picture to 2020 and 2021 with no significant changes from 2021.

Q34A. Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you?
Base: Physically able to walk 2021 n=4,141, 2022 n=2772
No change to question wording and response options. Question order changed

Safety in the dark is a greater barrier in Hamilton, while travel time more prominent in Hamilton and Christchurch



BARRIERS TO WALKING BY REGION – JAN-DEC 2022

	Total	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
I don't feel safe walking in the dark	33%	35%	39% ▲	34%	30%	32%	31%
Walking is not a quick way for me to get where I need to go	30%	28%	31%	27%	27%	35% ▲	32%
I live too far away for it to be practical	27%	28%	27%	27%	23%	29%	31%
Walking adds too much time to the journey	25%	22%	31% ▲	23%	20% ▼	30% ▲	30%
Average number of barriers listed	2.8	2.9	3.1	2.7	2.5	2.8	3.0

Dunedin has had a significant increase for several barriers.

- I don't feel safe walking in the dark (+10)
- I live too far away for it to be practical (+9)

The average number of barriers listed has also increased for Dunedin from 2.3 to 3.0.

▲ Significantly higher than total ▼ Significantly lower than total

Q34A. Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you? Base: Physically able to walk 2022 n=2,750 No change to question wording and response options. Question order changed Auckland n=481, Hamilton n=436, Tauranga n=424, Wellington n=440, Christchurch n=537, Dunedin n=432



Safety and logistics continue to be the largest barriers to cycling

BARRIERS TO CYCLING – JAN-DEC 2022

SAFETY AND CONFIDENCE 

39% (-1)
I don't feel safe because of how people drive


32% (-2) ▼
I don't feel safe cycling in the dark

30% (-3) ▼
I'm concerned about the speed of other road users

LOGISTICAL BARRIERS 

35% (+2)
I always have too much to carry

32% (-1)
It's not enjoyable because of the weather

EASE AND ACCESS 

32% (+1)
I don't have access to a bike

28% (=)
Cycling is not a quick way for me to get where I need to go

27% (+4) ▲
I live too far away for it to be practical

There has been a significant decline in some of the barriers related to safety this year, specifically for cycling in the dark and related to the speed of other road users.

But there has been a significant increase in people saying the live too far away for it to be practical.

▲ Significantly higher than 2021
▼ Significantly lower than 2021

Q11b. Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling, which of these statements, if any, apply to you?
Base: Physically able to cycle 2021 n=4,194, 2022 n=2,750

Safety in the dark is a greater cycling barrier in Hamilton, while the speed of road users is greater barrier in Tauranga



SAFETY BARRIERS TO CYCLING BY REGION – JAN-DEC 2022

	Total	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
I don't feel safe because of how people drive	39%	43%	39%	42%	37%	36%	38%
I don't feel safe cycling in the dark	32%	36%	40% ▲	35%	28%	29%	30%
I'm concerned about the speed of other road users	30%	33%	28%	35% ▲	30%	27%	31%

While there are notable differences in safety barriers, logistical barriers are relatively consistent across the regions.

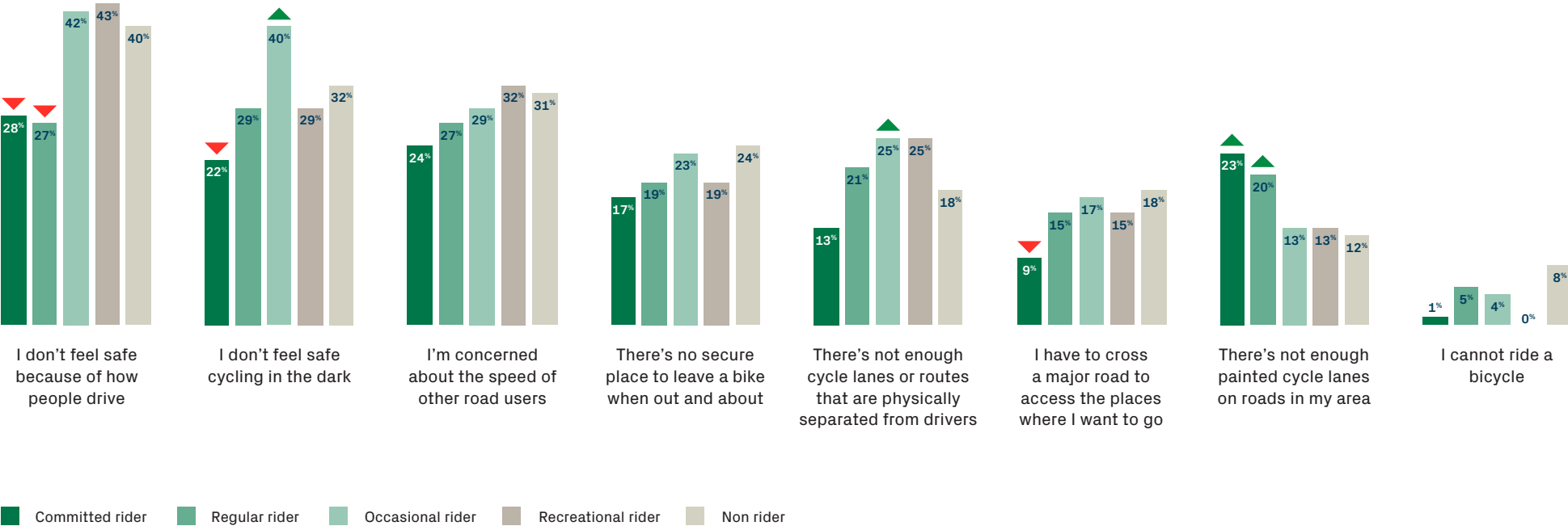
▲ Significantly higher than total ▼ Significantly lower than total

Q11b. Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling, which of these statements, if any, apply to you?
 Base: Physically able to cycle 2021 n=4,194, 2022 n=2,750 Auckland n=485, Hamilton n=448, Tauranga n=420, Wellington n=446, Christchurch n=540, Dunedin n=433



Safety due to how people drive is less of a barrier for committed and regular riders

CYCLING BARRIERS ACROSS SEGMENTS



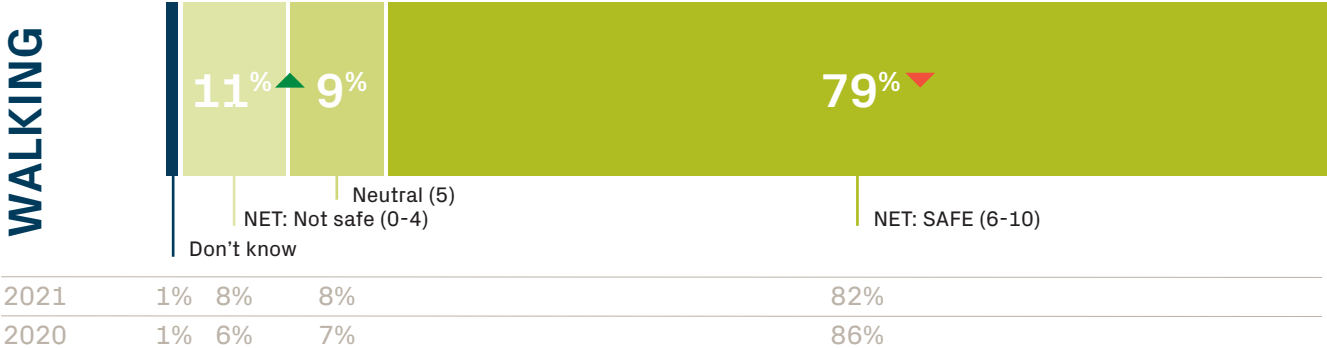
Q11b. Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling, which of these statements, if any, apply to you?
 Base: Physically able to cycle, 2022 n=2,750, Committed Commuter n=79, Regular Urban Rider n=166, Occasional Urban Rider n=285, Recreational Cyclist n=134, Non rider n=2,108

▲ Significantly higher than total
 ▼ Significantly lower than total

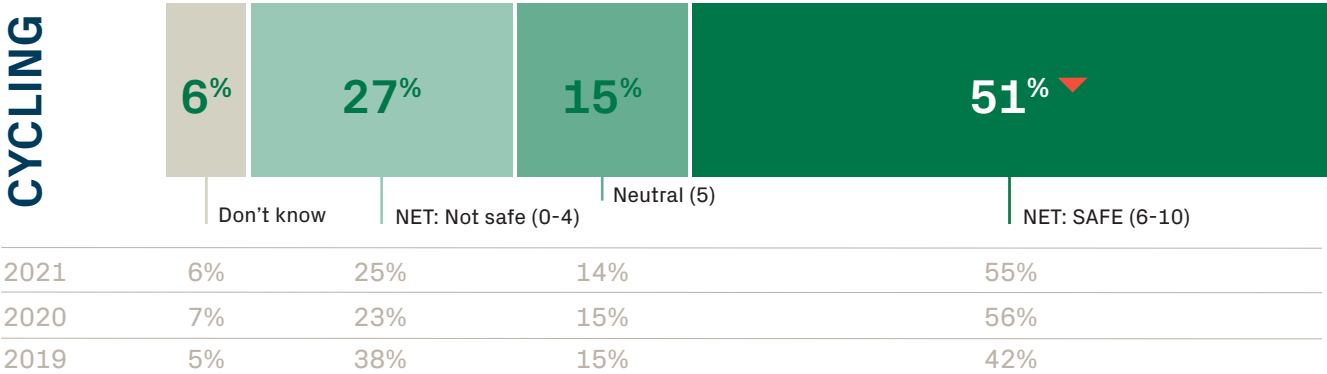


Perceptions of the safety of walking and cycling have been declining since 2020

PERCEPTIONS OF SAFETY – % OF PEOPLE WHO FEEL SAFE WALKING / CYCLING (6-10) – JAN-DEC 22



Perceptions of walking being safe have continued to decline. With a significant decrease by 3% points since 2021 and has declined by 7% since 2020. This decline is greatest among those 35-54 years (-6), Tauranga (-8), Auckland (-6).



Perceptions of cycling being safe have declined year on year since 2020, with a significant decrease this year. However, perceptions of cycling being safe remain significantly greater than pre-Covid levels in 2019. The decline this year is greatest for 18-34 (-7), Hamilton (-12), Tauranga (-10).

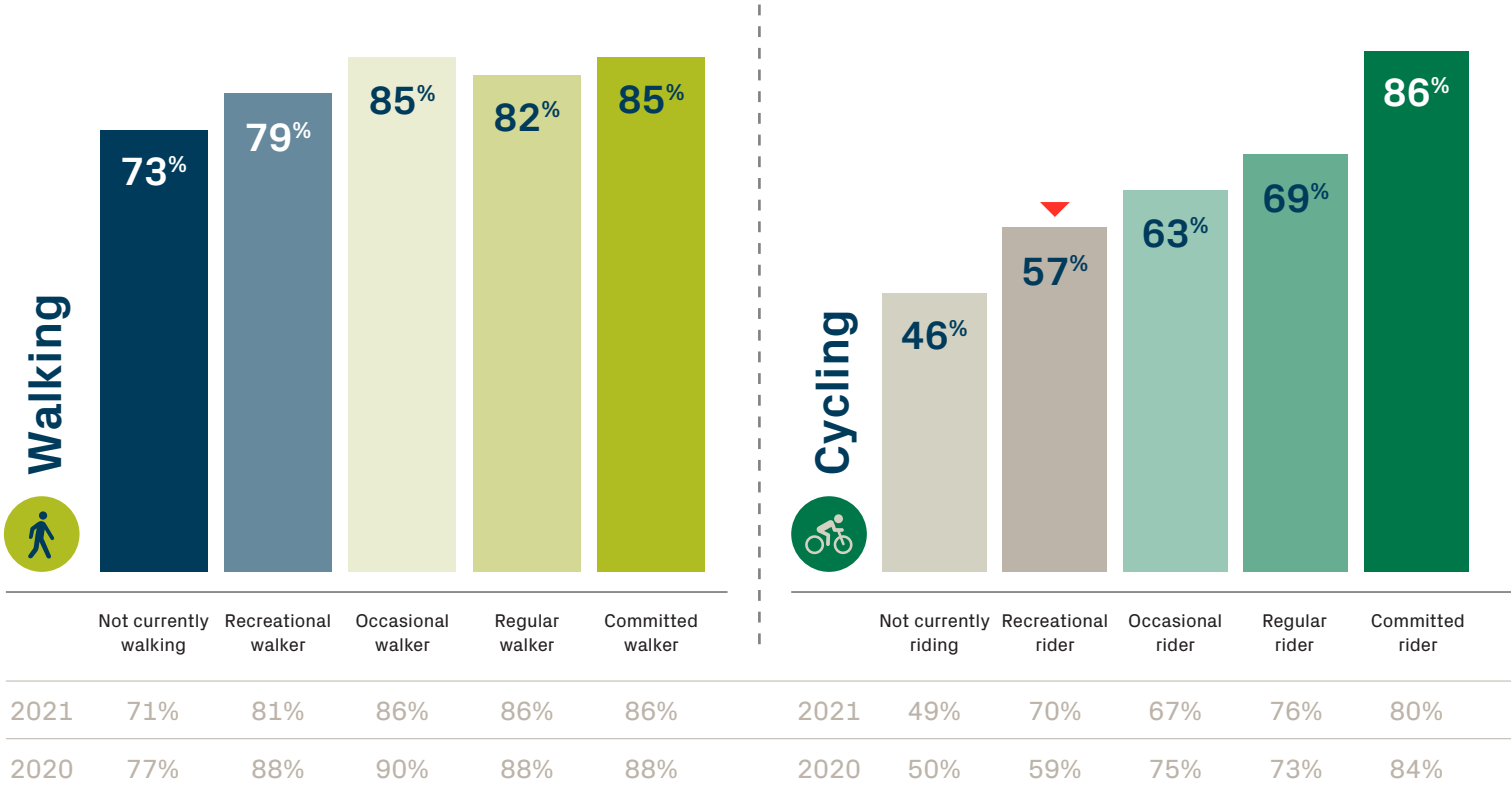
Q7A - In general, how safe are you/would you be walking in the [REGION] area? Base: Physically able to walk n=2,750 A5 - In general, how safe are you/would you be, riding a bicycle in [REGION]? Base: Physically able to cycle n=2,772

▲ Significantly higher than 2021 ▼ Significantly lower than 2021



Those who don't walk or cycle have lower safety perceptions – this is more evident in cycling

PERCEPTIONS OF SAFETY – % OF PEOPLE WHO FEEL SAFE WALKING / CYCLING (6-10)



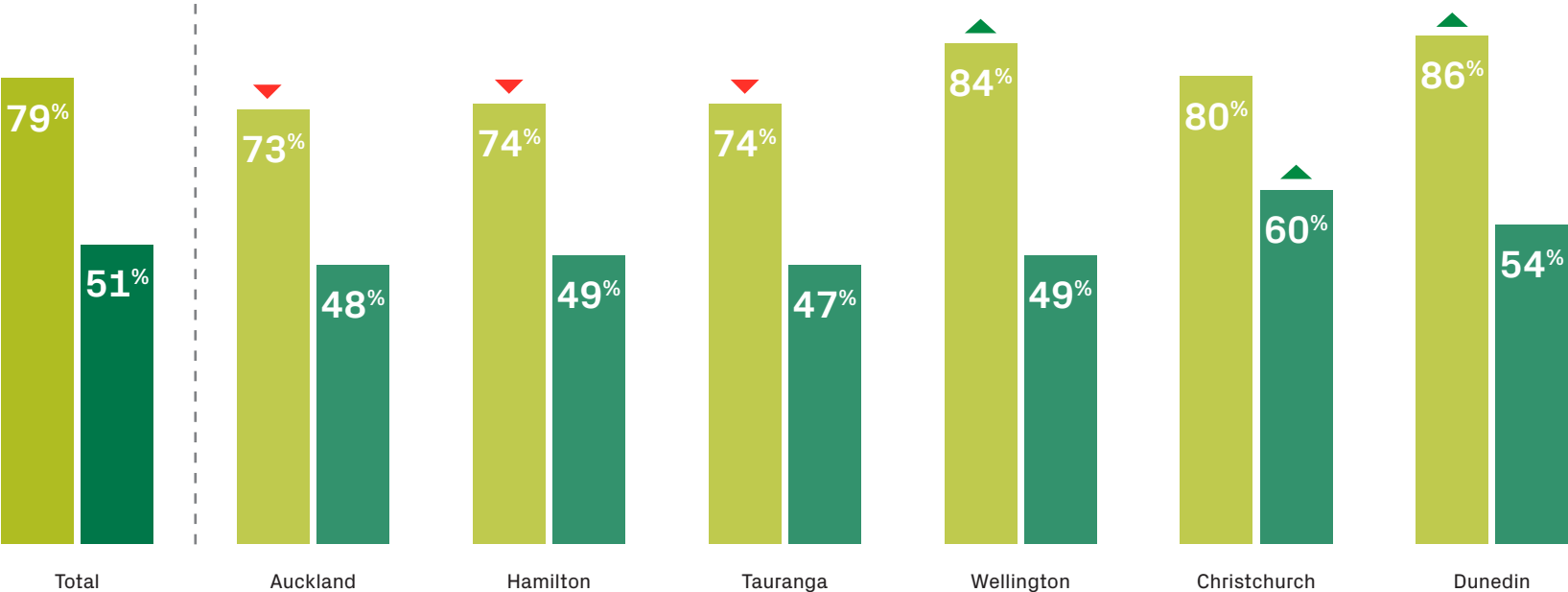
Q7A - In general, how safe are you/would you be walking in the [REGION] area? [NET Safe - 6-10 out of 10] Base: Physically able to walk 2022 n=2,750
 A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10] Physically able to cycle 2021 n=2,772

▲ Significantly higher than 2021 ▼ Significantly lower than 2021



Walking safety perceptions are highest in Dunedin and cycling safety perceptions are greatest in Christchurch

PERCEPTIONS OF SAFETY – % OF PEOPLE WHO FEEL SAFE WALKING / CYCLING (6-10)



Walking Cycling

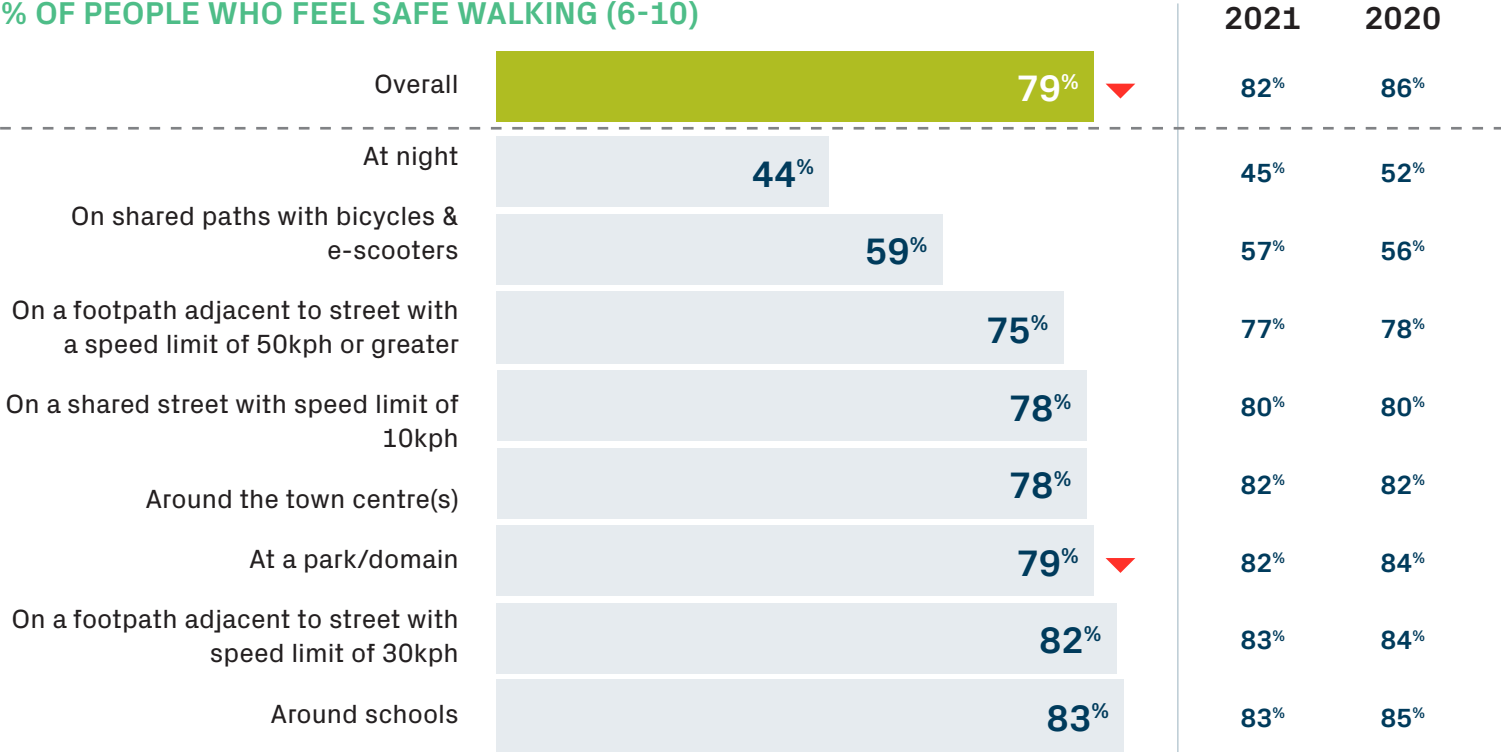
Q7A - In general, how safe are you/would you be walking in the [REGION] area? [NET Safe - 6-10 out of 10]
 Base: Physically able to walk n=2750, Auckland n=481, Hamilton n=435, Tauranga n=424, Wellington n=440, Christchurch n=534, Dunedin n=430
 A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10]
 Physically able to cycle n=2,772, Auckland n=485, Hamilton n=447, Tauranga n=419, Wellington n=446, Christchurch n=537, Dunedin n=431

▲ Significantly higher than total ▼ Significantly lower than total



For walking, the greatest declines in safety perceptions are at a park/domain

PERCEPTIONS OF WALKING SAFETY JAN-DEC '22 – % OF PEOPLE WHO FEEL SAFE WALKING (6-10)



Walking at night remains the activity seen as the most unsafe when it comes to walking.

Q7A - In general, how safe are you/would you be walking in the [REGION] area? [NET Safe - 6-10 out of 10] Base: Physically able to walk 2022 n=2,750

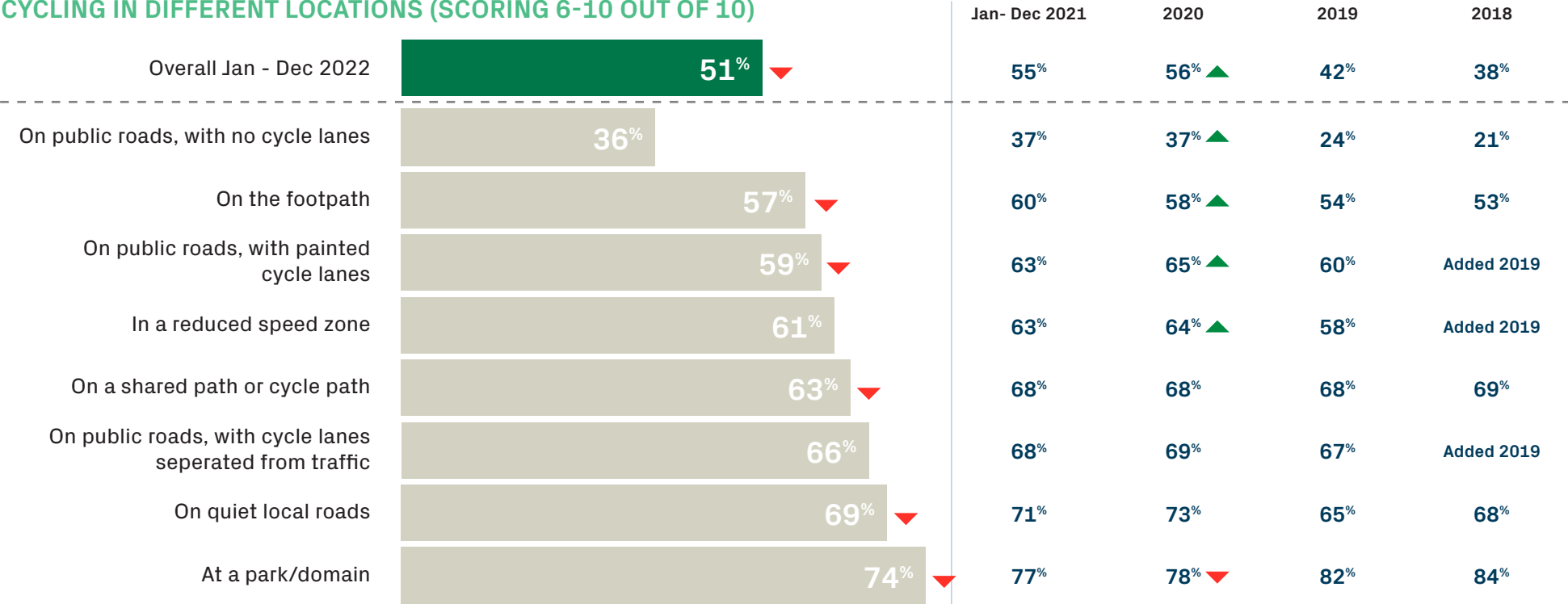
▲ Significantly higher than previous period

▼ Significantly lower than previous period



Cycling safety perceptions have declined significantly across a range of locations, but most are still higher than pre-covid 2019

PERCEPTIONS OF CYCLING SAFETY – % OF PEOPLE WHO FEEL SAFE CYCLING IN DIFFERENT LOCATIONS (SCORING 6-10 OUT OF 10)



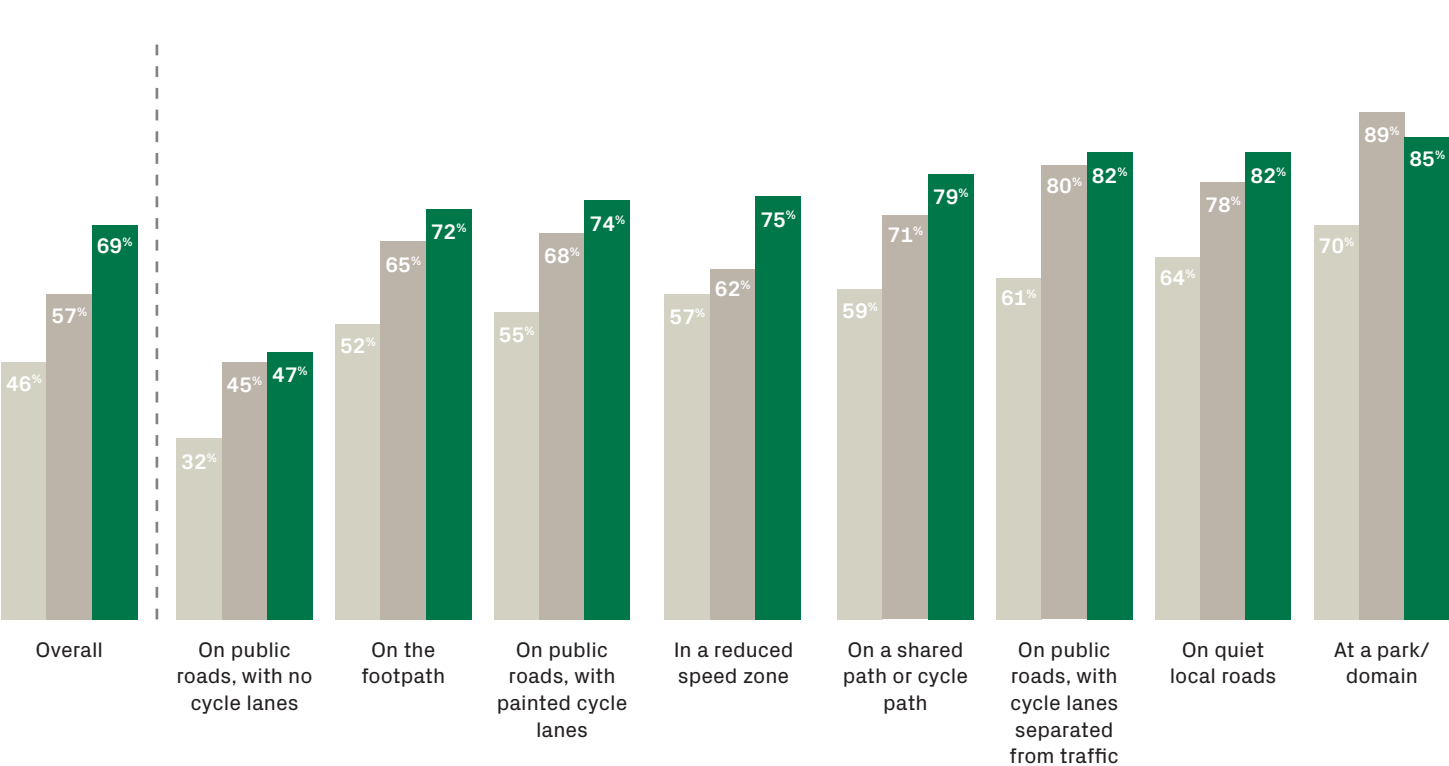
A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10] Base: Physically able to cycle n=2,772
 No change to question wording and response options. Question order changed

▲ Significantly higher than previous period
 ▼ Significantly lower than previous period



Safety perceptions increase the greater the separation between vehicle and cyclist, with Urban riders feeling the safest

PERCEPTIONS OF CYCLING SAFETY IN DIFFERENT LOCATIONS BY SEGMENT –
% OF PEOPLE WHO FEEL SAFE CYCLING (SCORING 6-10 OUT OF 10) JAN - DEC 2022



For urban riders there has been a significant decline in safety perceptions for the following:

- On public roads with no cycle lanes (-7)
- On public roads with painted cycle lanes (-6)
- On shared path or cycle path (-7)
- In a reduced speed zone (-6)

For non rider there has been a significant decline in safety perceptions for the following:

- On shared path or cycle paths (-4)
- At a park or domain (-3)

There have been no significant shifts for recreational riders.

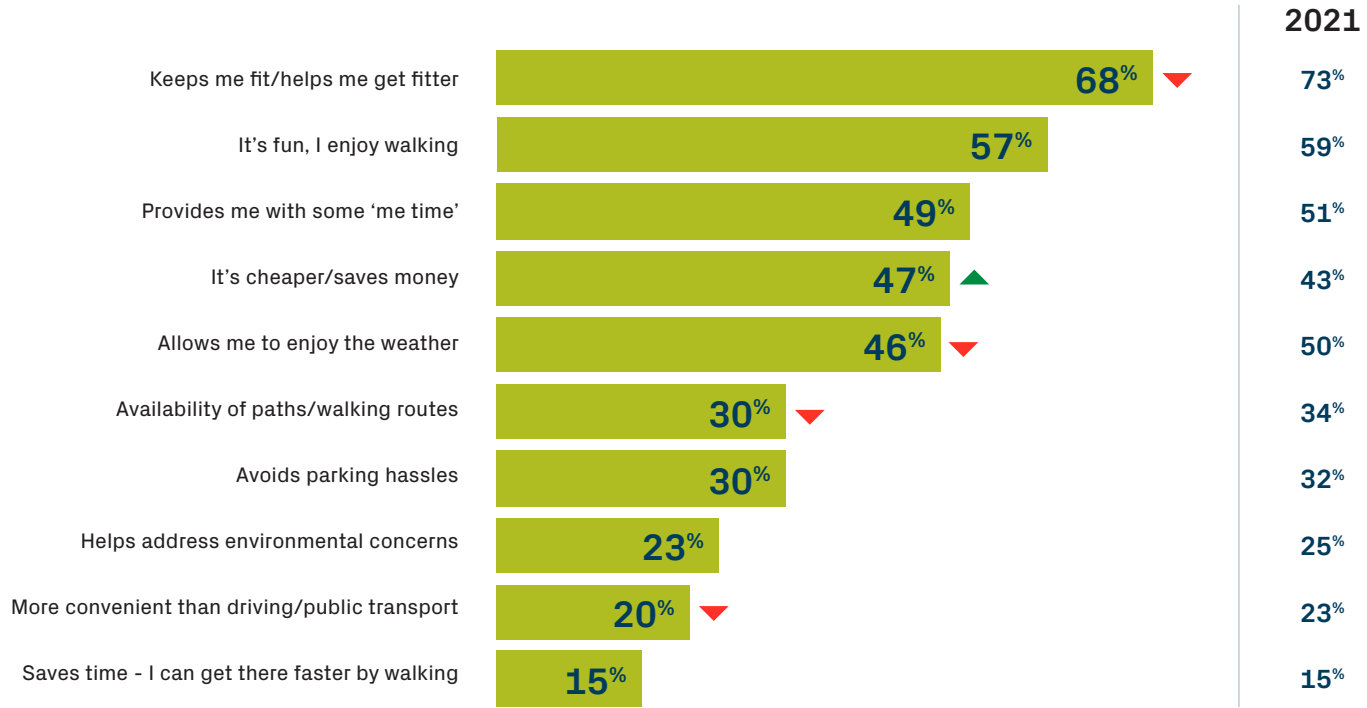
Not currently riding
 Recreational rider
 Urban rider (Occasional, regular, committed rider)

A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10]
 Not currently riding n=2,108 Recreational rider n=135 Urban rider (Occasional rider, regular rider, committed commuter) n=580



The main motivations for walking are personal, although there is an increase of people walking to save money

WALKING ENABLERS – JAN - DEC 22



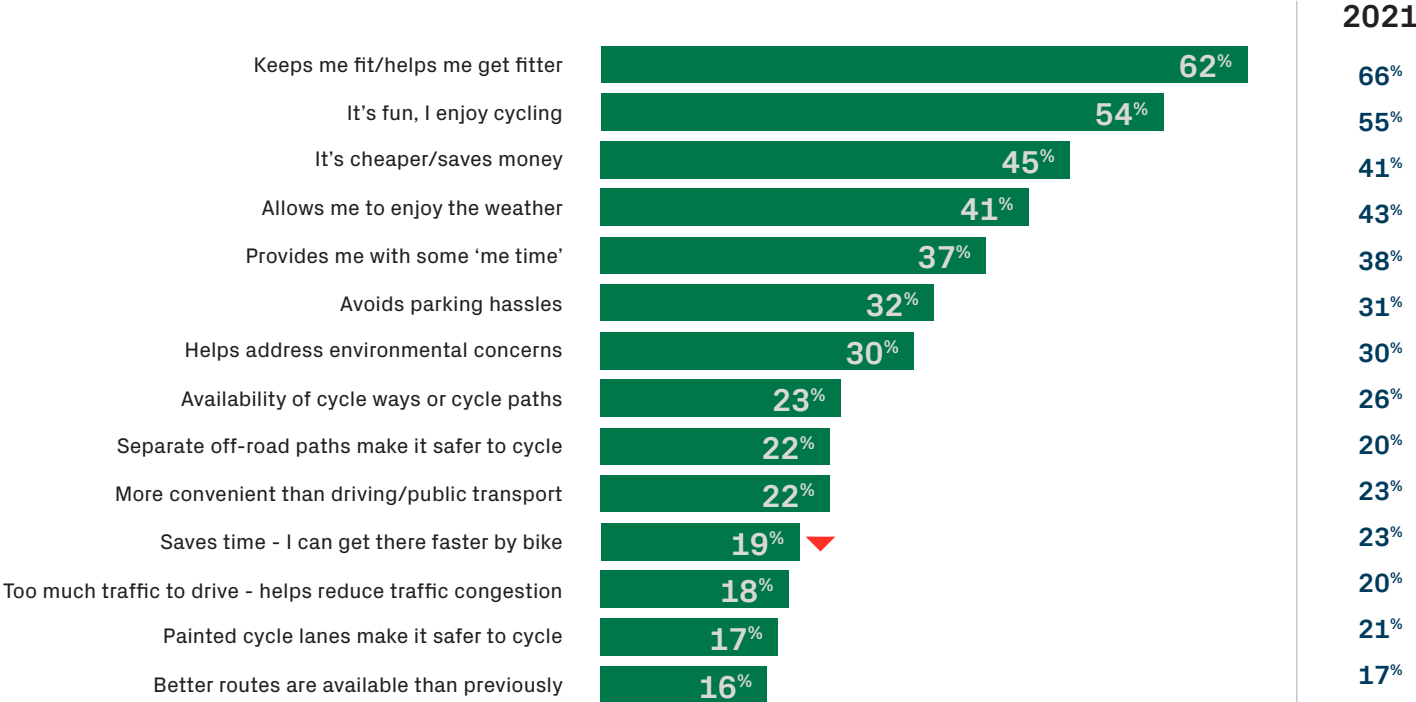
Q33. Looking at the list below, what are the main reasons you choose to walk?
2022 base n=2443
(showing all options >15%)

▲ Significantly higher than previous period
▼ Significantly lower than previous period



The main cycling motivators are also largely personal, with the ability to save money also a common enabler

CYCLING ENABLERS – JAN - DEC 22



Q11a. From the list below, what are the key reasons you choose to cycle?
 2022 base n=759
 (showing all options >15%)

▲ Significantly higher than previous period

▼ Significantly lower than previous period

8

A deep dive into gender

TRA

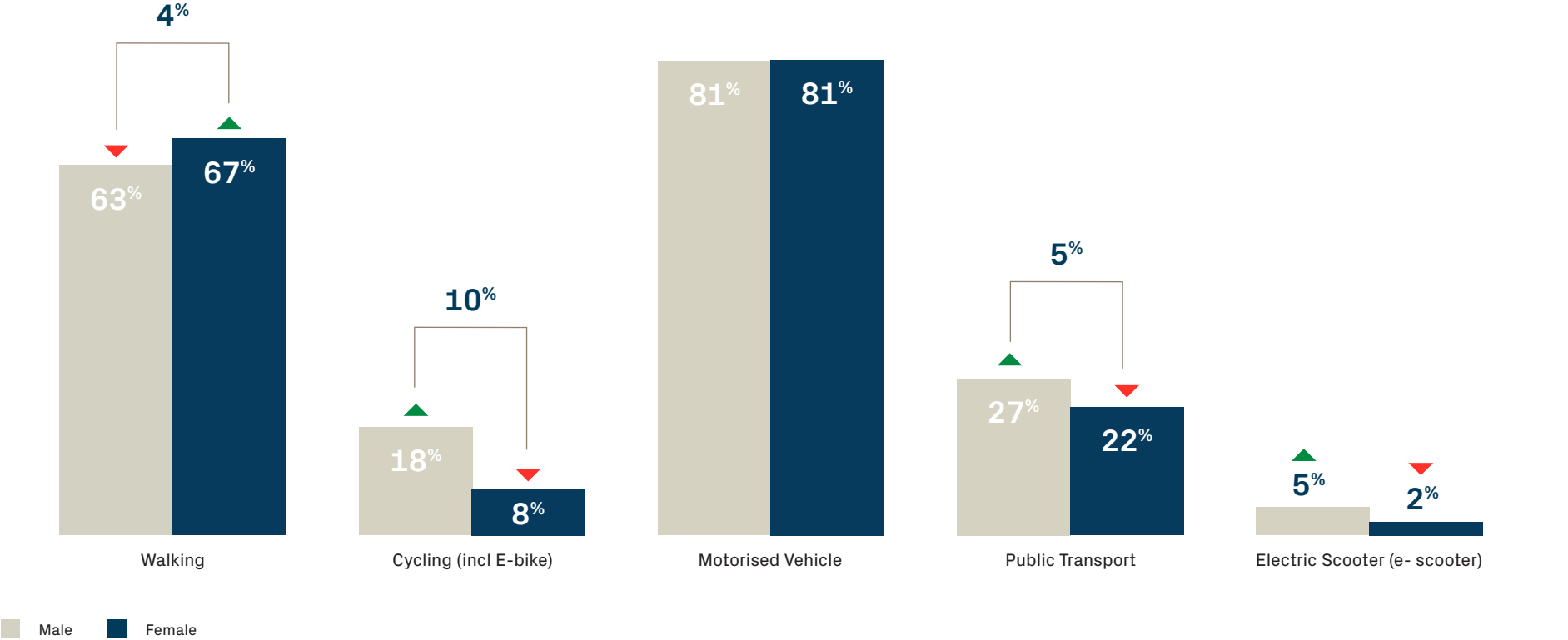
Summary: A deep dive into gender

- Females walk more than males, however males cycle more often than females.
- A likely contributor to the lower cycling rates amongst females are that fewer perceive cycling as a great way to get around when compared to males. The opposite is true with walking, with males less likely to perceive that walking is a great way to get around.
- Females are also less likely to agree that it is safe for children to walk or cycle to school.
- Walking motivators and barriers tend to be higher amongst females than males.
- The motivators to cycle are relatively consistent across gender, but the barriers are significantly higher amongst females.



Overall females tend to walk more than males but cycle less

TRAVEL AT LEAST ONCE A WEEK BY GENDER – JAN-DEC - 2022



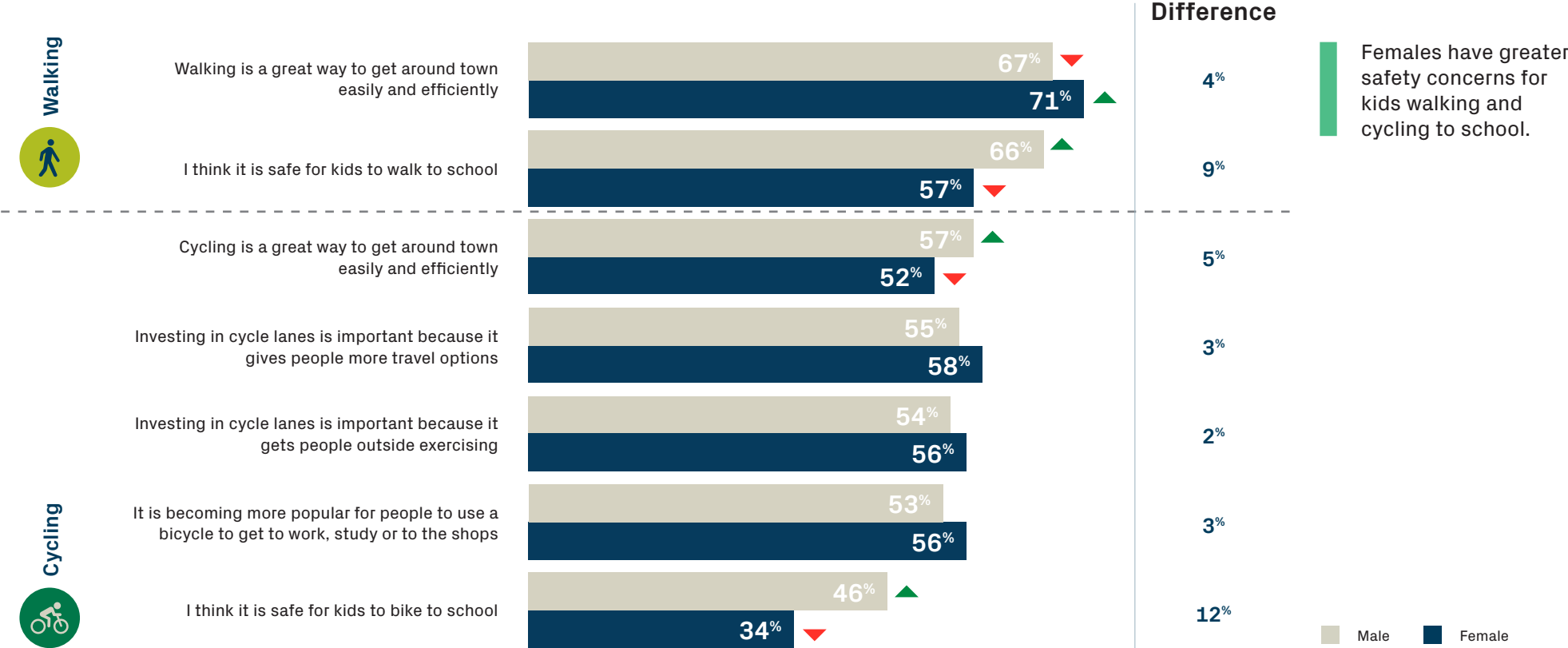
Q24. On average, how often do you use each of the following modes of transport, for any reason
Base: Total sample, 2019-2022 Males n =1,383, Females n =1886 walking 100m or crossing the road

▲ Significantly higher than opposite gender
▼ Significantly lower than opposite gender



Perceptions of ‘a great way to get around’ are higher amongst females for walking and higher amongst males for cycling

WALKING AND CYCLING PERCEPTIONS BY GENDER – JAN – DEC 2022



Q7 - Now please tell us how much you agree or disagree with the following statements (Strongly agree + agree)
 2022 Males n =1,383, Females n =1886

A majority of walking enablers are stronger for females



WALKING ENABLERS BY GENDER – JAN – DEC 2022

	Males	Females	Difference
Keeps me fit/helps me get fitter	63% ▼	73% ▲	9%
It's fun, I enjoy walking	53% ▼	61% ▲	8%
Provides me with some 'me time'	45% ▼	53% ▲	8%
It's cheaper/saves money	41% ▼	51% ▲	10%
Allows me to enjoy the weather	39% ▼	51% ▲	12%
Avoids parking hassles	28% ▼	33% ▲	5%
Availability of paths/walking routes	29%	31%	2%
Helps address environmental concerns	20% ▼	26% ▲	6%
More convenient than driving/public transport	20%	19%	1%
Saves time - I can get there faster by walking	15%	16%	1%
Better walking routes are available now	14%	14%	0%
Too much traffic to drive - helps reduce traffic congestion	14%	13%	-1%
There is no other way to get where I want to go	10%	10%	0%

Q33. Looking at the list below, what are the main reasons you choose to walk?
 Base: 2022 Males n=995, 2022 Females n=1441

▲ Significantly higher than opposite gender

▼ Significantly lower than opposite gender



The perceived barriers to walking are also higher amongst females

WALKING BARRIERS BY GENDER – JAN – DEC 2022

	Males	Females	Difference
I don't feel safe walking in the dark	22% ▼	42% ▲	20%
Walking is not a quick way for me to get where I need to go	28% ▼	32% ▲	5%
I always have too much stuff to carry	23% ▼	34% ▲	11%
I live too far away for it to be practical	25% ▼	29% ▲	4%
It's not enjoyable because of the weather	22% ▼	27% ▲	5%
Walking adds too much time to my journey	22% ▼	27% ▲	5%
I have to think about transporting other people	12% ▼	16% ▲	5%
It's not enjoyable because of the hills	11% ▼	15% ▲	5%
I can't be bothered/too much effort	13%	13%	0%
I don't know how long walking will take	11%	13%	2%
Having to shower and/or change after walking is inconvenient	8% ▼	11% ▲	3%
The pavements/footpaths are not in good condition in my area	9%	9%	1%
I don't feel safe because of how people drive	7% ▼	10% ▲	2%
I have to cross a major road to access the places where I want to go	8%	9%	1%
I don't feel safe because of the speed of other footpath users	7%	7%	1%
I don't feel safe because other footpath users pass me too closely	7% ▲	5% ▼	2%
I don't feel safe walking in the day	4%	4%	0%
There are very few stair free routes in my area	4%	3%	0%

Q34A. Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you?
 Base: 2022 Males n=1108, 2022 Females n=1636

▲ Significantly higher than opposite gender

▼ Significantly lower than opposite gender



Cycling enablers are relatively consistent across gender – females are more likely to cycle due to enjoyment

CYCLING ENABLERS BY GENDER – JAN – DEC 2022

	Males	Females	Difference
Keeps me fit/helps me get fitter	60%	65%	5%
It's fun, I enjoy cycling	51%	58% ▲	7%
It's cheaper/saves money	45%	46%	1%
Allows me to enjoy the weather	39%	44%	6%
Provides me with some 'me time'	37%	36%	-1%
Avoids parking hassles	32%	31%	-1%
Helps address environmental concerns	28%	34%	6%
Availability of cycle ways or cycle paths	22%	23%	1%
More convenient than driving/public transport	23%	20%	-3%
Separate off-road paths make it safer to cycle	21%	23%	2%
Saves time - I can get there faster by bike	18%	20%	2%
Too much traffic to drive - helps reduce traffic congestion	16%	20%	4%
Painted cycle lanes make it safer to cycle	18%	16%	-2%
Better routes are available than previously	17%	15%	-3%
More consistent travel time	14%	14%	0%
Want to make the most of a new bike	9%	12%	3%
Availability of cycle parking at public transport interchanges/stations	11%	8%	-3%
There's physical barriers between motorists & cyclists	9%	9%	-1%
To get to/from public transport	8%	5%	-3%

Q11a. From the list below, what are the key reasons you choose to cycle?
 2022 Males n =399, Females n =357

▲ Significantly higher than opposite gender

▼ Significantly lower than opposite gender

Barriers to cycling are greater amongst females



CYCLING BARRIERS BY GENDER – JAN – DEC 2022

	Males	Females	Difference
I don't feel safe because of how people drive	31% ▼	46% ▲	16%
I always have too much stuff to carry	30% ▼	38% ▲	8%
I don't feel safe cycling in the dark	27% ▼	37% ▲	10%
I don't have access to a bike	29% ▼	35% ▲	7%
It's not enjoyable because of the weather	29% ▼	34% ▲	5%
I'm concerned about the speed of other road users	23% ▼	37% ▲	15%
Cycling is not a quick way for me to get where I need to go	28%	29%	2%
I live too far away for it to be practical	26%	28%	1%
Having to shower and/or change after cycling is inconvenient	21% ▼	27% ▲	6%
There's no secure place to leave a bike when out and about	22%	24%	2%
It's not enjoyable because of the hills	20% ▼	25% ▲	5%
I can't be bothered/too much effort	18%	21%	3%
There's not enough cycle lanes or routes that are physically separated from drivers	17% ▼	21% ▲	4%
I have to think about transporting other people	16% ▼	19% ▲	4%
I have to cross a major road to access the places where I want to go	14% ▼	21% ▲	6%
There's not enough painted cycle lanes on roads in my area	11% ▼	15% ▲	4%
I don't like wearing a helmet	10% ▼	14% ▲	4%
I cannot ride a bicycle	5% ▼	9% ▲	4%

Q11b. Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling in [pipe:S3a], which of these statements, if any, apply to you?
 Base: 2022 Males n=1,142 Females n=1,623

▲ Significantly higher than opposite gender

▼ Significantly lower than opposite gender

Appendix

TRA



Barriers for walking remain stable compared to 2021

WALKING BARRIERS

	Jan - Dec-21	Jan - Dec 22	Change from 2021
I don't feel safe walking in the dark	31%	33%	1%
Walking is not a quick way for me to get where I need to go	30%	30%	0%
I always have too much stuff to carry	27%	28%	1%
I live too far away for it to be practical	27%	27%	0%
Walking adds too much time to my journey	25%	25%	0%
It's not enjoyable because of the weather	24%	25%	0%
I have to think about transporting other people	15%	14%	-1%
I can't be bothered/too much effort	12%	13%	1%
It's not enjoyable because of the hills	13%	13%	1%
I don't know how long walking will take	13%	12%	-1%
Having to shower and/or change after walking is inconvenient	9%	9%	1%
The pavements/footpaths are not in good condition in my area	9%	9%	0%
I don't feel safe because of how people drive	10%	9%	-1%
I have to cross a major road to access the places where I want to go	9%	8%	-1%
I don't feel safe because of the speed of other footpath users	7%	7%	0%
I don't feel safe because other footpath users pass me too closely	6%	6%	0%
I don't feel safe walking in the day	4%	4%	1%
There are very few stair free routes in my area	4%	3%	0%

Q34A. Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you?
 Base: Physically able to walk 2021 n=4,141, 2022 n=2750
 No change to question wording and response options. Question order changed

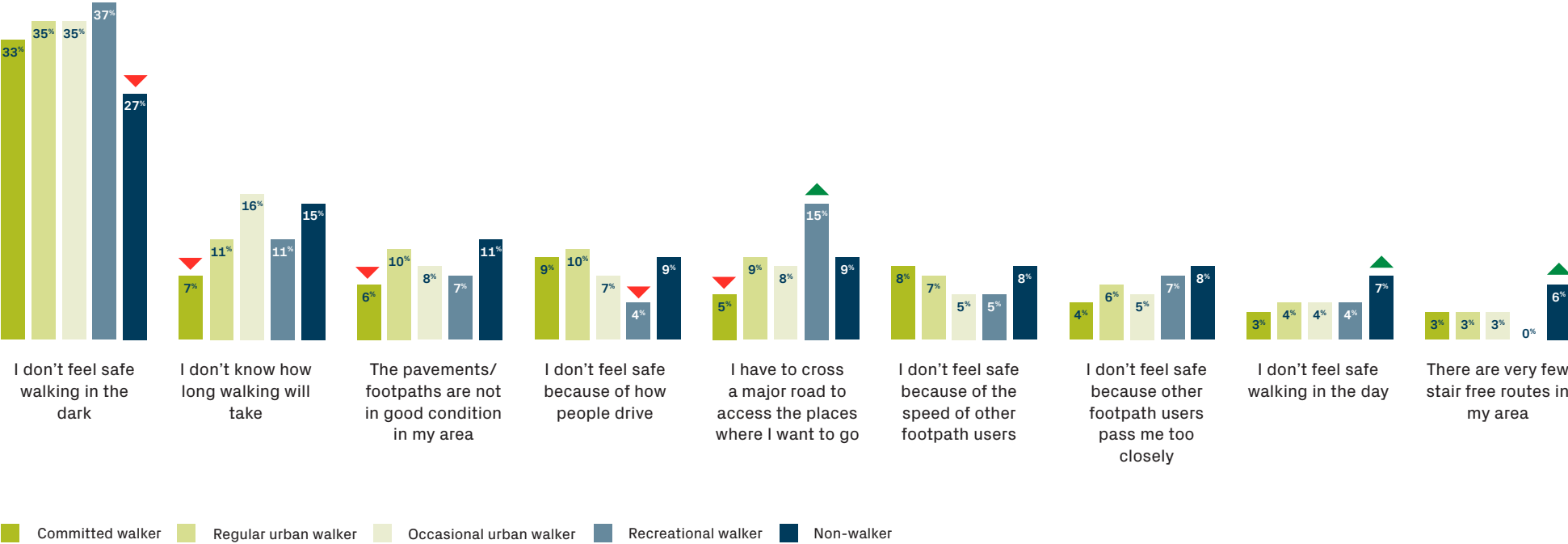
▲ Significantly higher than prior year

▼ Significantly lower than prior year

Safety in the dark is the largest barrier to walking across all segments



WALKING BARRIERS ACROSS SEGMENTS – MOST ACTIONABLE FOR WAKA KOTAHI



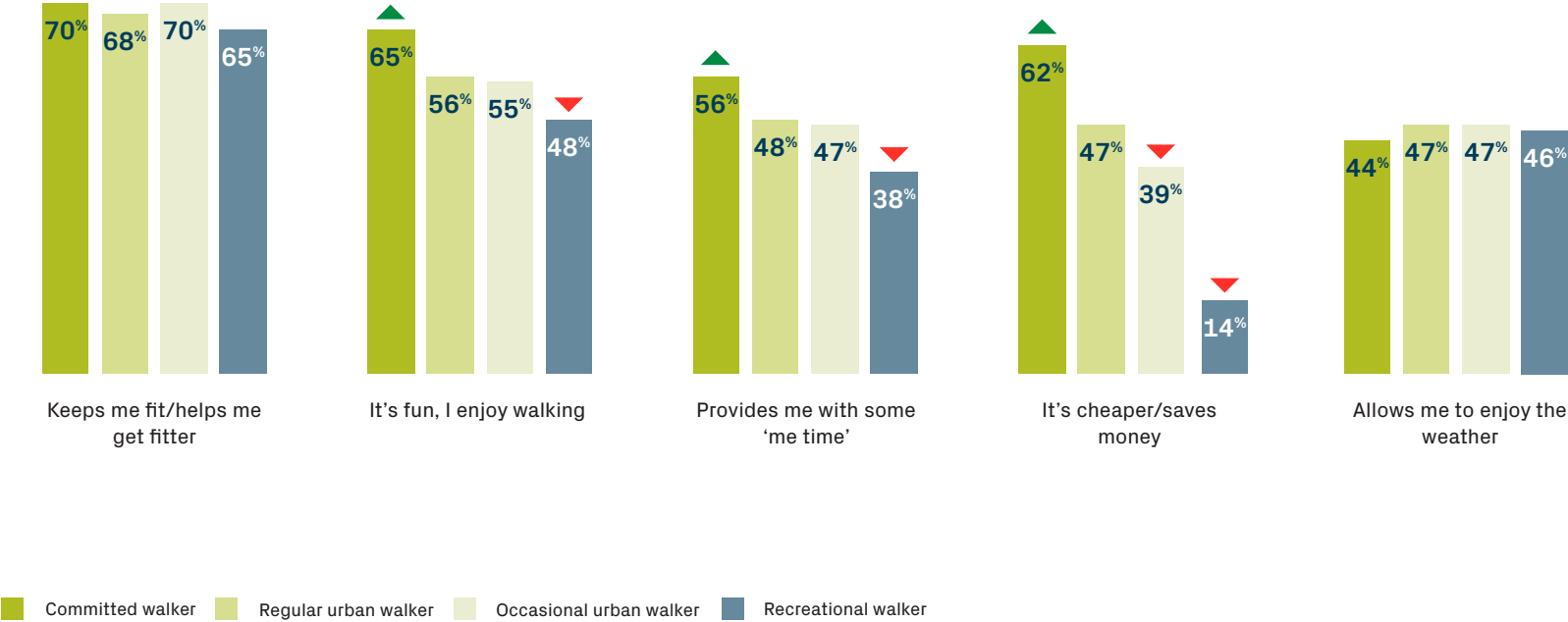
Q34A. Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you?
 Base: Physically able to walk 2022 n=2750, Committed Walker n=559, Regular Urban Walker n=866, Occasional urban walker n=564, Recreational walker n=148, Non-walker n=613
 No change to question wording and response options. Question order changed

▲ Significantly higher than total
 ▼ Significantly lower than total



Enjoyment, personal time and ability to save money are stronger walking motivators for Committed Walkers

WALKING ENABLERS – TOP 5



Q33. Looking at the list below, what are the main reasons you choose to walk?
2022 base n=2443, Committed Walker n=605, Regular Urban Walker n=999, Occasional urban walker n=635, Recreational Walker n=181

▲ Significantly higher than total ▼ Significantly lower than total



Barriers for cycling remain stable compared to 2021

CYCLING BARRIERS

	Jan - Dec-21	Jan - Dec 22	Change from 2021
I don't feel safe because of how people drive	40%	39%	-1%
I always have too much stuff to carry	33%	35%	2%
I don't feel safe cycling in the dark	35%	32%	-2% ▼
I don't have access to a bike	33%	32%	-1%
It's not enjoyable because of the weather	31%	32%	1%
I'm concerned about the speed of other road users	33%	30%	-3% ▼
Cycling is not a quick way for me to get where I need to go	28%	28%	0%
I live too far away for it to be practical	23%	27%	4% ▲
Having to shower and/or change after cycling is inconvenient	26%	24%	-2%
There's no secure place to leave a bike when out and about	22%	23%	1%
It's not enjoyable because of the hills	23%	23%	0%
I can't be bothered/too much effort	19%	20%	1%
There's not enough cycle lanes or routes that are physically separated from drivers	20%	19%	-1%
I have to think about transporting other people	18%	17%	0%
I have to cross a major road to access the places where I want to go	18%	17%	-1%
There's not enough painted cycle lanes on roads in my area	15%	13%	-2%
I don't like wearing a helmet	12%	12%	0%
I cannot ride a bicycle	6%	7%	1%

Q11b. Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling, which of these statements, if any, apply to you? Base: Physically able to cycle 2021 n=4,194, 2022 n=2,750

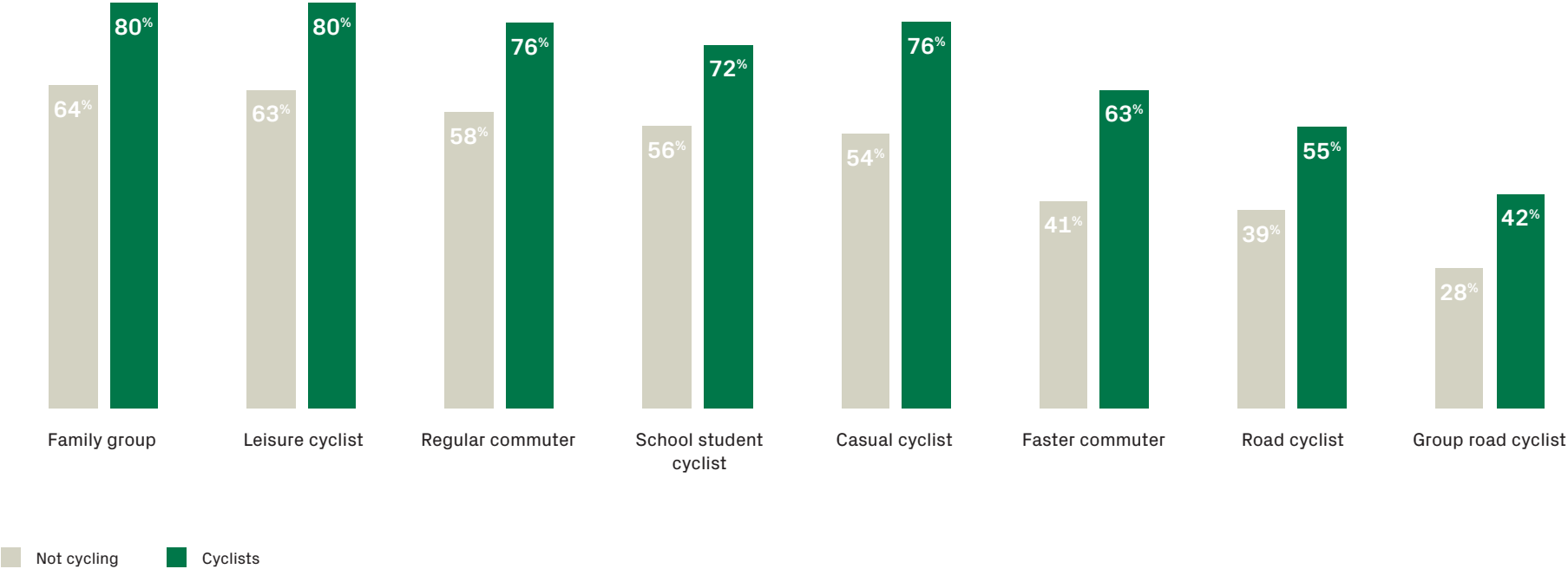
▲ Significantly higher than prior year

▼ Significantly lower than prior year



Non cyclists have the highest positive association with family and leisure cyclists

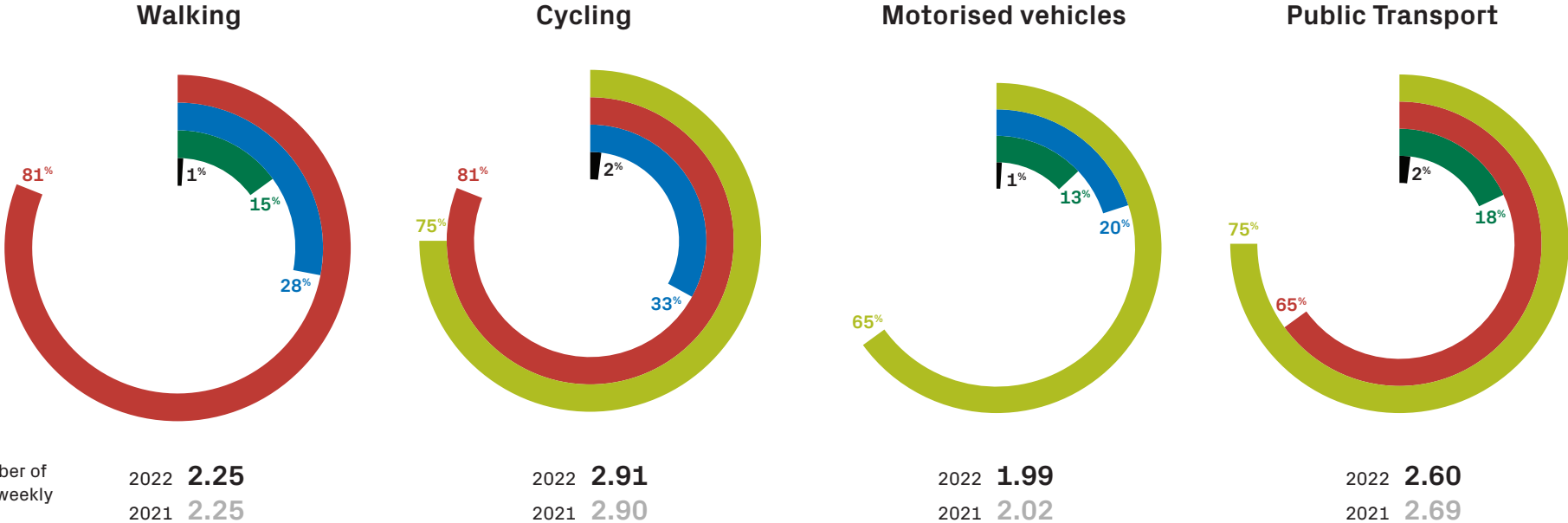
POSITIVE ASSOCIATION WITH GROUPS (VERY OR SOMEWHAT POSITIVE)



Q20. On the scale below, please select which best represents how you feel about each of the following types of cyclists.
Base: Total cyclists n=759, Total non cyclists n=2,519

Regular cyclists average three modes of transport each week, with three quarters choosing to use a motorised vehicle

MODE USAGE OVERLAP – OTHER MODES USED AT LEAST ONCE A WEEK



■ Walking
 ■ Motorised vehicle
 ■ Cycling
 ■ Public transport
 ■ Other

Q24. On average, how often do you use each of the following modes of transport, for any reason Base: 2022 n=3,278
 *walking 100m or crossing the road
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter) NET: Cycling (Bicycle, Electric bike)
 NET: Public Transport (Bus, Train, Ferry)