



Understanding attitudes and perceptions of cycling & walking

NZ TRANSPORT AGENCY



TRA

BACKGROUND OF OUR RESEARCH PROGRAMME

This study provides a way of measuring the effectiveness of our nationwide Urban Cycleways Programme

Since late 2014, there has been significant investment in Urban Cycleways. The investment sought to get more people riding bikes, to deliver to transport and safety outcomes, see the bulk of investment in infrastructure to improve the cycling network and to lift the social license of cycling.

NZTA have been focused on measuring and understanding current travel behaviour, attitudes and perceptions to measure progress on the delivery and to guide the direction of future activity.

The insight objectives

- 1** To measure and monitor walking and cycling behaviour in main urban centres across New Zealand.
 - Comparing results over time.
 - Comparing results across main urban centres.
- 2** To understand the attitudes towards, and associated motivations for, walking and cycling in urban centres.
- 3** To understand the potential growth opportunity in walking and cycling – both through increasing frequency, and penetration, of active modes of travel.
- 4** To evaluate the public response to current activity aligned to the investment in 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=2,174 New Zealanders.

With a focus on key regions of:

- Auckland n=530
- Wellington n=505
- Christchurch n=520
- Hamilton n=207
- Tauranga n=205
- Dunedin n=207

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

- n=2,174 +/-2.1%
- n~500 is +/-4.4%
- n~200 is +/-6.9%

Fieldwork ran from May 22nd – June 24th 2019.

Invitations were sent on a daily basis over the fieldwork period to ensure there was no bias due to weather conditions.

Fieldwork was completed via an online survey using 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

for age and gender within each region - to ensure data is representative according to Stats NZ 2013 census.

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

COMPARISONS OVER TIME

Due to methodological differences between 2016 and 2018, whereby 2016 was conducted using CATI (telephone interviews) and 2018 was conducted online, any changes over this time must be viewed as indicative shifts only.

The online methodology between 2018 and 2019 is consistent and conducted at the same time of the year with an identical sampling method.

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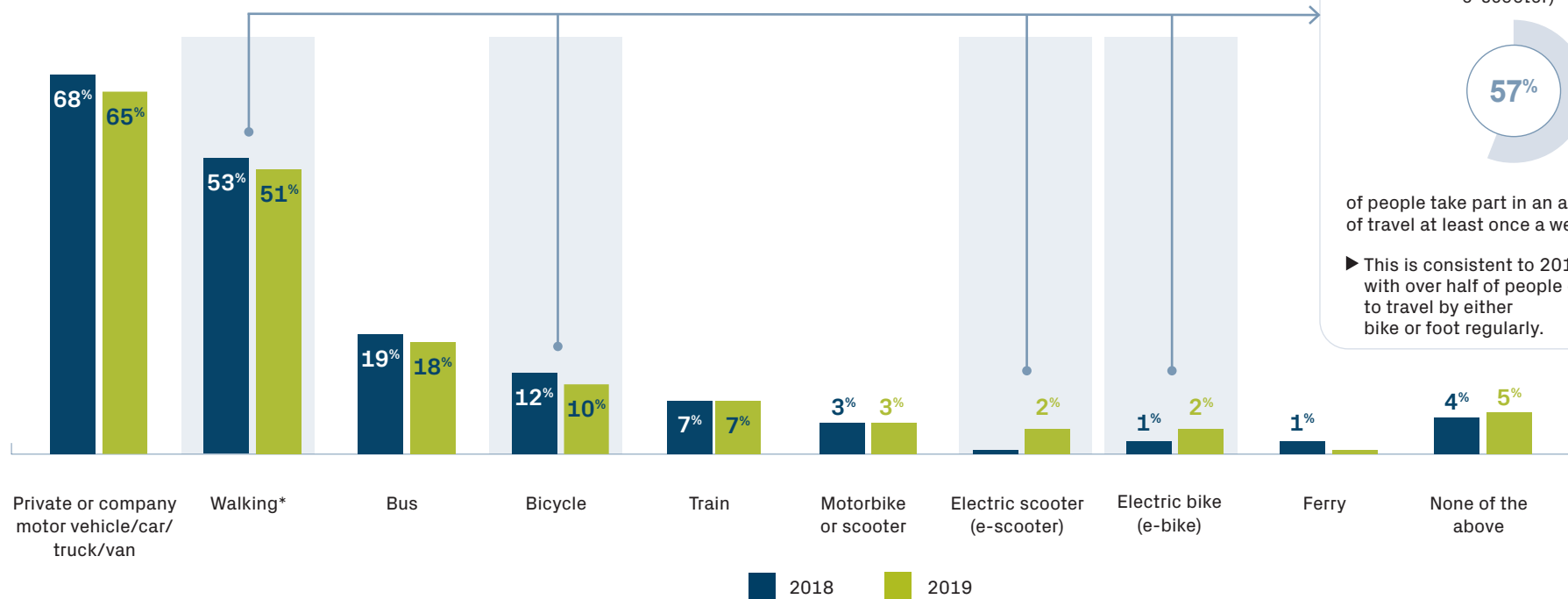


Walking & cycling in the broader travel context

TRA

Walking and cycling, as modes of travel, continue to be well utilised as travel choices

REGULAR MODES OF TRANSPORTATION - AT LEAST ONCE A WEEK



- Walking +
- Bicycle +
- Electric bike (e-bike) +
- Electric Scooter (e-scooter)



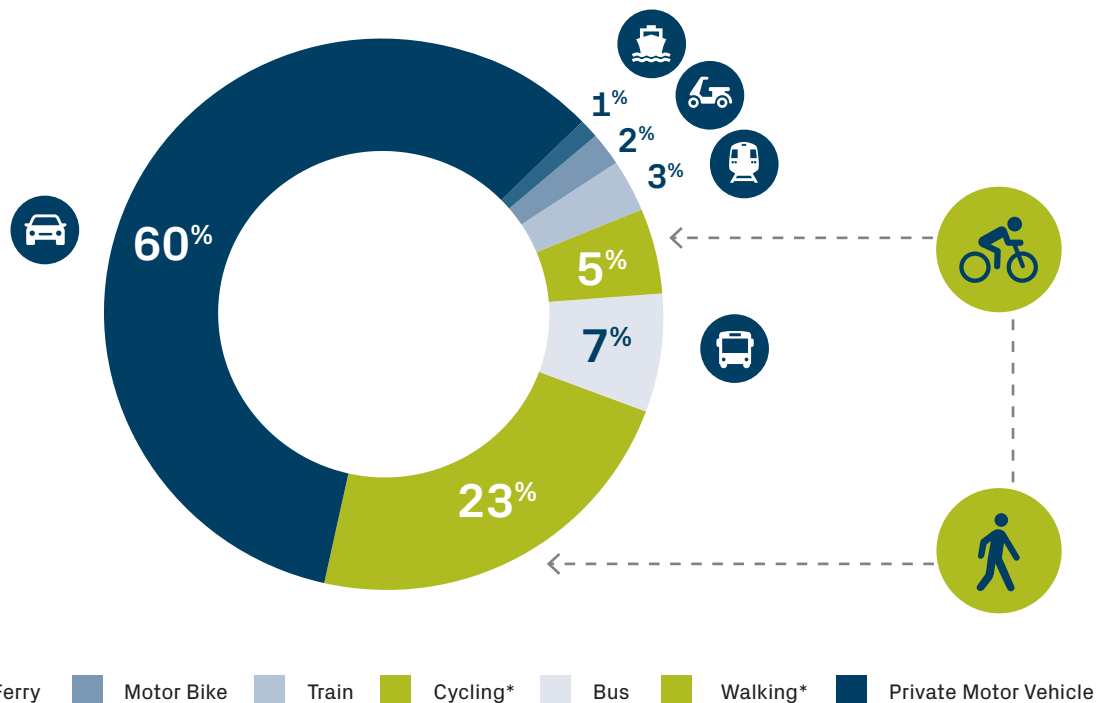
of people take part in an active mode of travel at least once a week

► This is consistent to 2018, with over half of people choosing to travel by either bike or foot regularly.

Q23b. And which of the following do you regularly use, e.g. once a week or more often? This can be for any reason, including work, sport or recreation.
 Base: Total sample, 2018 n=2,115, 2019 n=2,174 *walking 100m or crossing the road

As such, almost a third of all trips travelled are by foot or by bike – but the car still dominates

TRIPS TRAVELLED IN THE LAST WEEK - SHARE OF TOTAL TRIPS BY MODE



28% of all recent trips measured were travelled by either walking or cycling. This is consistent with 2018.

Across all recent trips travelled, from a volume perspective, private motor vehicles (PMV) continue to account for the greatest share of trips.

Driving mode shift is about balancing the number of trips taken by car (the dominant behaviour), with those taken by other modes.






The immediate task is to increase the number of people on bikes, through overall participation, and the frequency of riding, through regular use.

But in turn, there is an opportunity to shift some trips that would typically be taken by car, to walking or cycling, or a combination of modes.

Q26. Thinking about the past week, how many times did you use each type of transport when travelling for these occasions?
 Base: Total trips travelled in last week across modes. Total sample, 2018 n=2,115, 2019 n=2,174
 *walking 100m or crossing the road. *includes e-bikes

But it is in influencing mode choice across utility travel that will be central to NZ’s urban cycling and walking projects

TYPES OF TRIPS TRAVELLED IN THE LAST WEEK – BY MODE TRAVELLED

	TOTAL					
To/from work	24%	25%	16% ▼	45% ▲	36% ▲	19%
To/from shops	18%	21% ▲	19% ▲	4% ▼	11% ▼	10% ▼
To/from visiting friends/family	10%	12% ▲	7%	6% ▼	7% ▼	10%
For recreation or fitness	9%	5% ▼	19%	3% ▼	3% ▼	26% ▲
To/from somewhere else	9%	10%	7%	4% ▼	7%	7%
Take children to school/day care	7%	8% ▲	5% ▼	1% ▼	2% ▼	4%
To get to/from school, college, university	5%	3% ▼	8% ▲	6%	9% ▲	6%
As a part of work	6%	6%	5%	17%	3% ▼	5%
To/from public transport	5%	2% ▼	11% ▲	8%	11% ▲	6%
To/from doctor/dentist/ pharmacy	4%	5%	2% ▼	5%	9%	4%
For organised sport	2%	2%	1% ▼	1% ▼	3%	3%




There are broad community benefits for walking and/or cycling of any kind.

Influencing travel, for the purpose of getting from A to B, is critical to urban cycling and walking programmes.

Utility trips make up over half of cycling and walking trips.

Although people walk and cycle for a range of reasons, it will be encouraging travel across key utility trips that will yield the greatest benefit.

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

 Utility trips  Significantly higher than total  Significantly lower than total

2

Overall state of walking

TRA

This segmentation framework differentiates people based on the type of walking they do

This identifies walkers based on how frequently they travel by foot for certain trips.

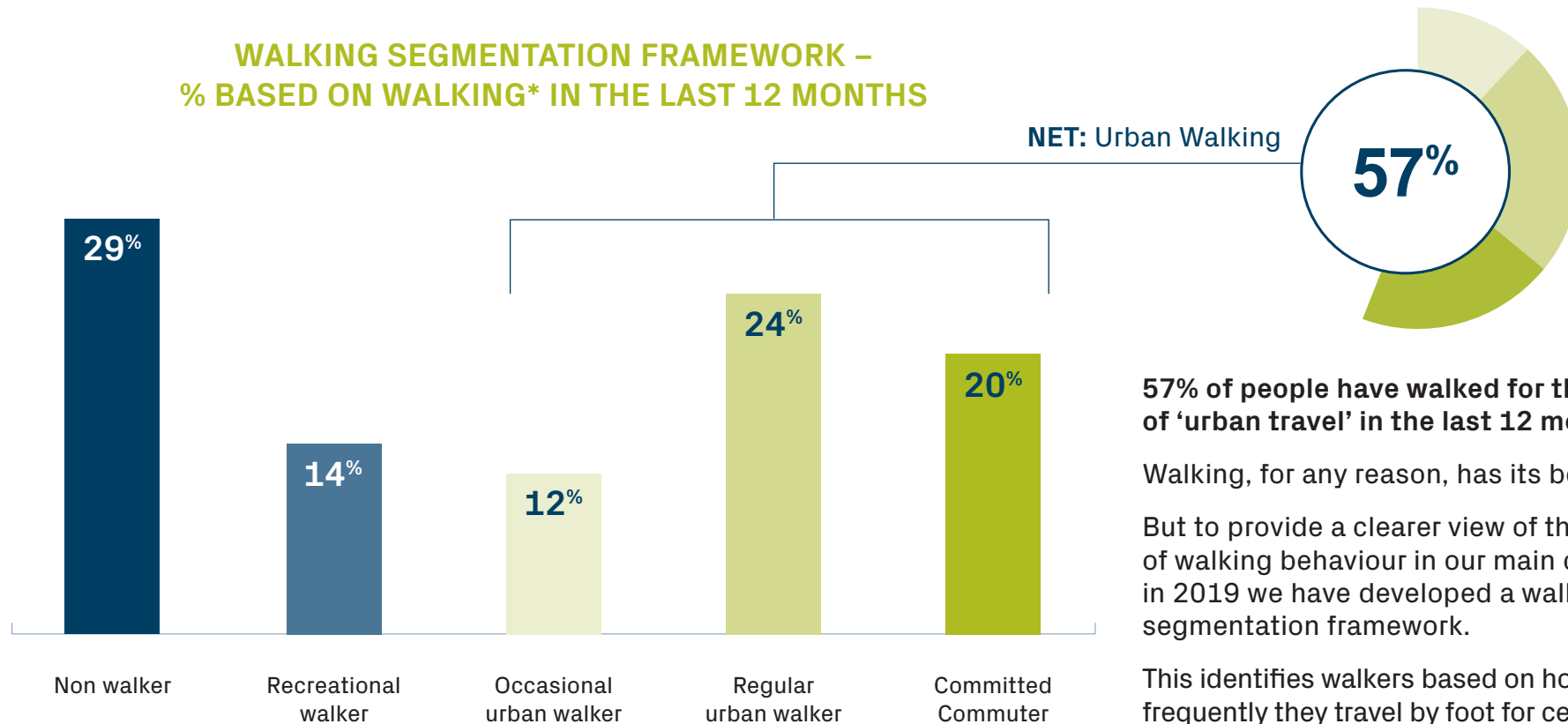
- **Non walker =**
Haven't walked* in the last 12 months.
- **Recreational walker =**
Walk for recreational purposes.
- **Occasional urban walker =**
Walk to/from work/study or to get around town a few times a month or not very often.
- **Regular urban walker =**
Walk to/from work/study or to get around town once or twice a week or every few days.
- **Committed commuter =**
Walk to/from work/study or to get around town most days.

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



Across New Zealand, there is clear engagement with urban walking

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



57% of people have walked for the purpose of ‘urban travel’ in the last 12 months.

Walking, for any reason, has its benefits.

But to provide a clearer view of the type of walking behaviour in our main cities, in 2019 we have developed a walking segmentation framework.

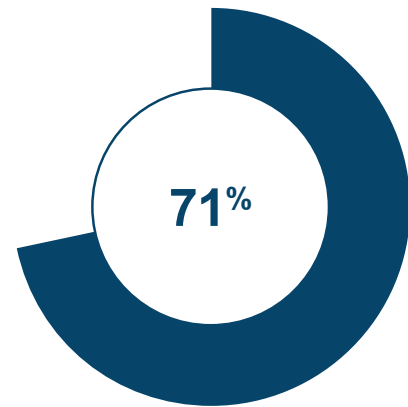
This identifies walkers based on how frequently they travel by foot for certain trips.**

Q23a. Which of the following have you used in the past 12 months? (NON WALKER)
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 ** Refer to Appendix for Segment definitions. Base: Total sample, 2018 n=2,115, 2019 n=2,174.

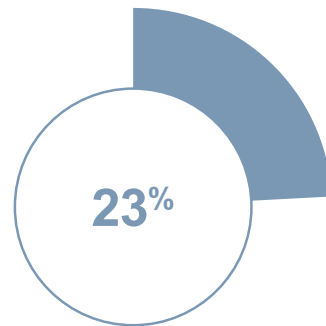
For many, walking is already incorporated in their general travel behaviour



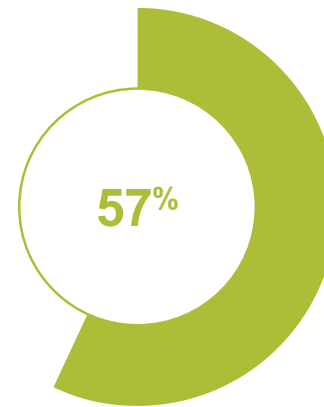
OVERVIEW OF WALKING METRICS



Walked* in past year



Of all trips in last week by foot



Participating in urban walking*

Top reasons for walking are:



Fitness



Enjoyment



Saves money

When compared to 2018, walking behaviour is consistent year-on-year.

Half of people are walking regularly - at least once a week, and engagement in walking for urban-style trips is high.

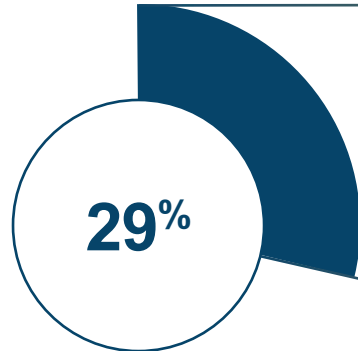
The challenge is to increase the number of people choosing to walk for shorter distance utility trips and increasing the frequency of walking as an alternative mode of travel.

Q23a- Which of the following have you used in the past 12 months?
 Q23b And which of the following do you regularly use, e.g. once a week or more often?
 Q26. Thinking about the past week, how many times did you use each type of transport when travelling for these occasions?
 Base: Total sample, 2018 n=2,115, 2019 n=2,174 *walking 100m or crossing the road

And for those who choose not to walk, there continues to be an openness for doing more in the future



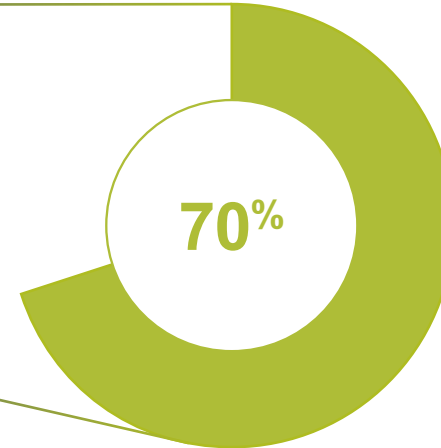
HAVE NOT WALKED* IN LAST 12 MONTHS - TOTAL



2018 - 28%

29% have not utilised walking* as a way of travelling around their city in the last year.

OPENNESS TO WALKING IN THE FUTURE - NON WALKERS



2018 - 73%

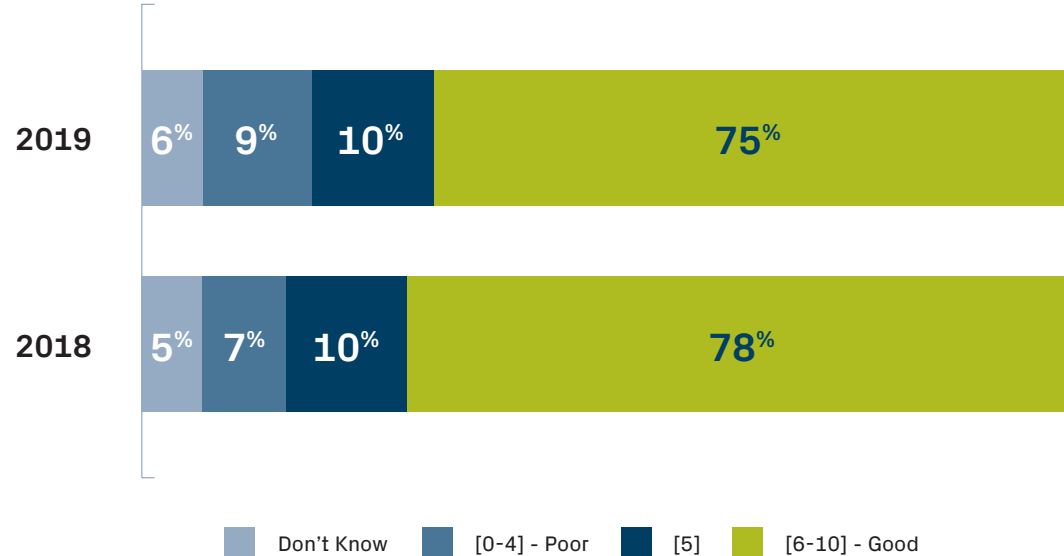
But the majority of this group would consider doing so in the future.

Q23a. Which of the following have you used in the past 12 months?
 Base: Total sample, n=2,174 *walk 100m or cross the road
 Q31 Which of the following best describes you and your chance of walking in the future?
 Base: Non walkers, n=464
 *walking 100m or crossing the road



Overall, public perception of walking continues to be positive; 75% view walking to be in a good state

OVERALL STATE OF WALKING – RATING (0-10)



When rating the state of walking within their region, 75% of people perceive the overall state of walking to be good.

At an overall level this is consistent over time.

Across the regions there are no significant differences.

*Q2. Overall, how do you view the current state of walking in [your region]? 0-Very Poor, 10 Very Good
Base: Total sample, 2018 n=2,115, 2019 n=2,174*



Success will come from a sustained focus on walking for utility travel

Overall, participation in walking (for travel) remains consistent year on year.

From the perspective of influencing urban travel, the primary focus is to get people walking for the purpose of getting from A to B, or for utility travel.

Although many are walking for utility trips already, there remains an opportunity to drive a growth in urban walking behaviours by:

- a) increasing the frequency with which people walk (over other modes).
- b) encouraging new trips to be walked, where they would otherwise be travelled using other modes of transport.

Continued attention to these specific behaviours will be important for contributing to an overall mode shift in urban travel.

IMPLICATION



3

Overall state of cycling

TRA

This segmentation framework differentiates people based on the type of cycling they do

This identifies cyclists based on how frequently they travel by bike for certain trips.

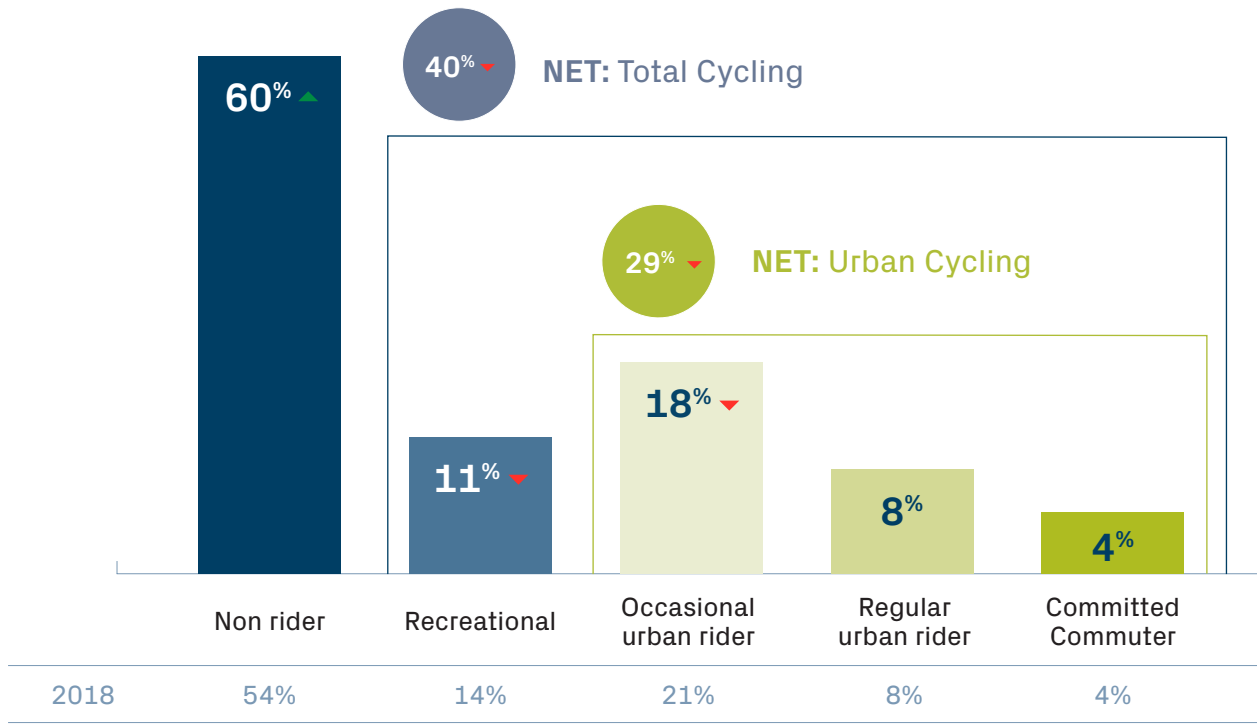
- **Less supportive non rider =**
Cycle not very often/not at all and disagree that cycling is a great way to get around.
- **Supportive non rider =**
Cycle not very often/not at all and agree that cycling is a great way to get around.
- **Recreational off road =**
Cycle for recreation purposes not on roads/cycle paths.
- **Recreational on road =**
Cycle for recreation purposes on roads/cycle paths.
- **Occasional urban rider =**
Cycle to/from work/study or to get them round town a few times a month or not very often.
- **Regular urban walker =**
Cycle to/from work/study or to get them round town once or twice a week or every few days.
- **Committed commuter =**
Cycle to/from work/study or to get around town most days.



Across NZ's main urban centres, participation in urban cycling is down but only for occasional riders



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



Compared to 2018, overall participation levels in cycling have declined from 46% to 40%.

Although participation levels are down at the total and urban level, the decline is noted amongst more occasional urban riders rather than regular and committed riders.

Across regions, total cycling levels are down in Wellington and Christchurch. Urban cycling is stable across most of our main centres, however we see a decline in Hamilton.

Q4. In the last 12 months have you used a bicycle to...?
Q5. When you use your bike for recreational purposes, do you cycle...?

Q6. How often do you currently ride a bicycle?
Base: Total sample: 2016, n=414, 2018, n=2,115 2019, n=2,174

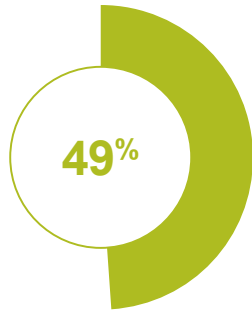
▲ Significantly higher than 2018 ▼ Significantly lower than 2018



Amongst both current cyclists, and non cyclists, there is a degree of openness to cycling more often in the future

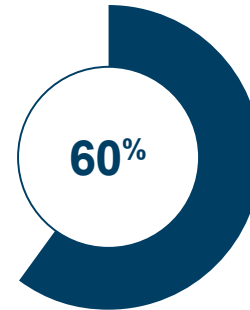
OPENNESS TO START CYCLING / CYCLE MORE

CYCLISTS
(40% of urban population)



Amongst existing cyclists, there is a willingness to cycle more often.

NON-CYCLISTS
(60% of urban population)



Amongst non-cyclists there remains a high degree of openness to future cycling.

Over half of non-cyclists are open to taking up cycling in the future. Those aged between 35-44 years are most open to this.

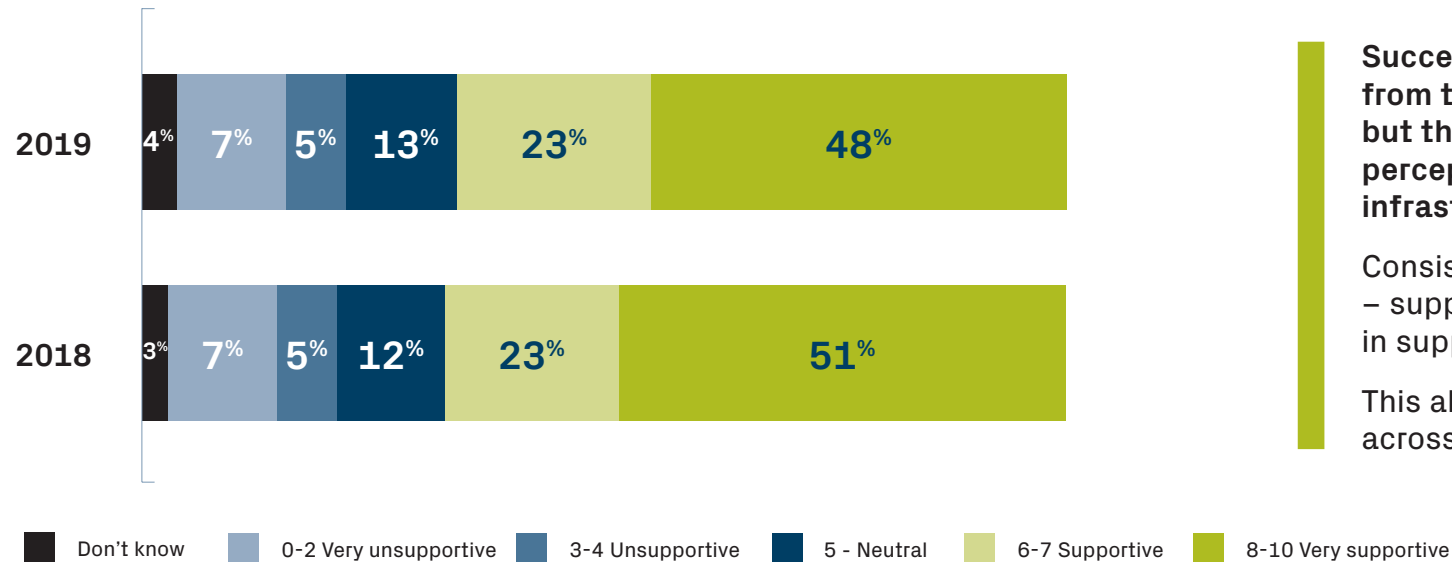
But bike ownership or access remains one of the key barriers here. **46% don't have access to a bike.**

Q6b. Thinking about cycling, which of the following statements best describes you? (I do not currently cycle but would consider doing so in the future) Base: Non-cyclists, n=982
Q6g. Which of the following statements best describes you when it comes to cycling, and the amount of cycling you do? (I would like to cycle more) Base: Cyclists, n=854



Success for cycling comes from directly influencing behaviour, but also improving public perception

SUPPORT FOR CYCLING IN THE COMMUNITY



Success for cycling not only comes from the direct influence on behaviour, but through improving community perceptions and support – of both infrastructure and investment.

Consistent with the previous year, overall – support for cycling remains high at 71% in support (48% strong support).

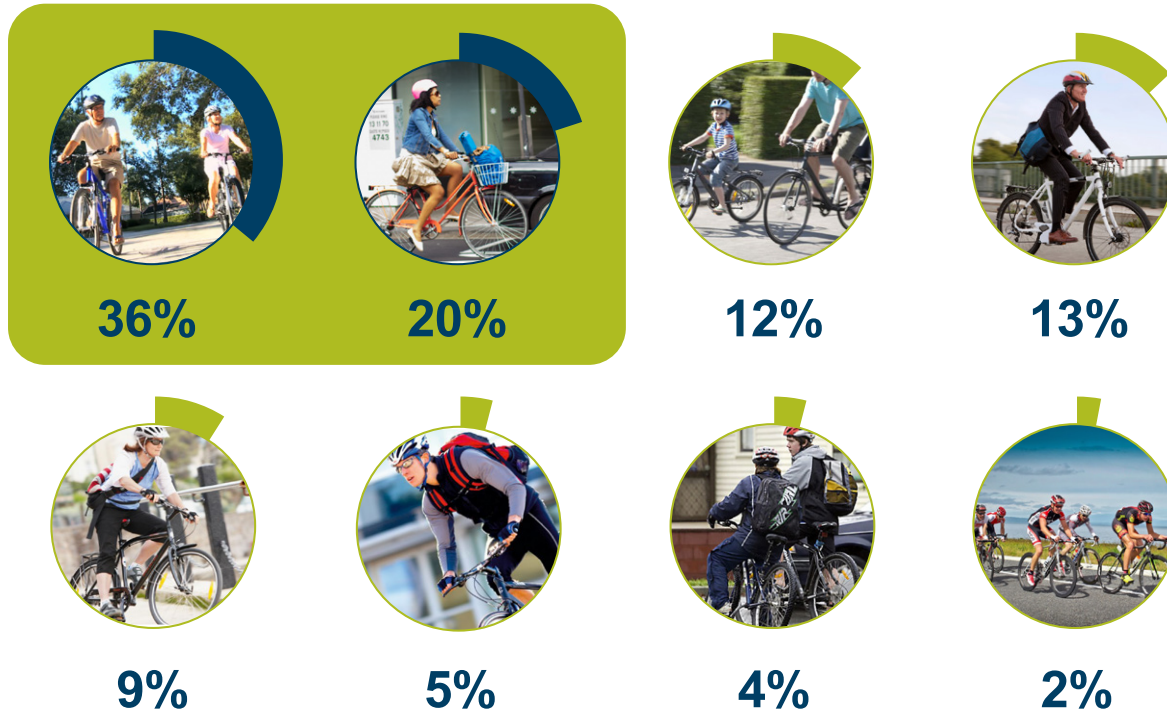
This also remains consistent across regions.

Q6c There are varying levels of support in the community for people who choose to cycle for journeys such as travelling to work, going to shops or other activities. To what degree do you support cycling in your community? Base: Total sample, 2018 n=2,115 2019 n=2,175



Cyclists are more likely to identify with ‘everyday’ looking people on bikes

PERSONAL IDENTIFICATION WITH DIFFERENT TYPES OF CYCLISTS



Despite the often conveyed image of ‘lycra-clad cyclists’ only a small proportion (heightened amongst committed commuters) are likely to identify with such riders.

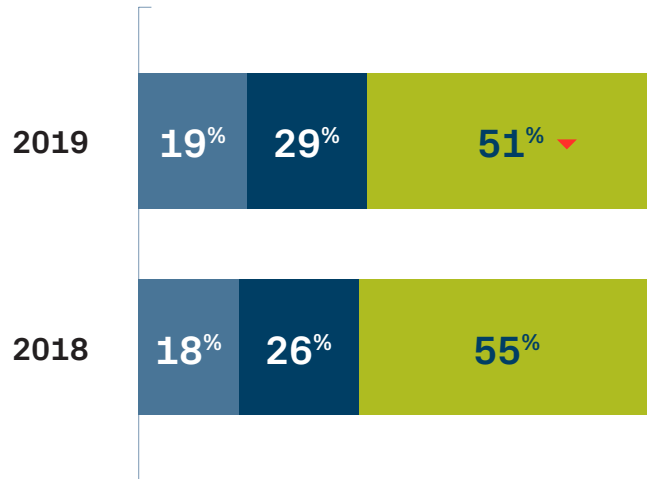
There are no significant shifts when compared to 2018.

Q18 Which of the following would best relate to the type of cyclist you are? [Images shown]. Base: Cyclists, n=854

At 51%, the majority of urban communities feel positive towards most 'people on bikes'; although down versus 2018



POSITIVITY TOWARDS CYCLISTS - OVERALL



- Negative (Somewhat or very)
- Neutral
- Positive (Somewhat or very)
- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018

POSITIVITY TOWARDS TYPES OF CYCLISTS



Overall positivity towards cyclists remains strong, a response which is even more positive when thinking about the groups that cyclists most identify themselves with.

*Q19 On the scale below, please select which best represents how you feel about cyclists?
 Q20. On the scale below, please select which best represents how you feel about each of the following types of cyclists. [NET Somewhat + Very Positive]
 Base: Total sample: 2018, n=2,115 2019, n=2,174*



There is a sense that cycling is growing in popularity

It is becoming more popular for people to use a bicycle to get to work, study or to the shops



Q7. How much do you agree or disagree with the following statements other people have made about cycling? It is becoming more popular for people to use a bicycle to get to work, study or to the shops [NET Strongly Agree + Agree]
 Base: Total sample: 2018, n=2,115 2019, n=2,174



Driving the adoption of cycling as a mode of transport is a long-term strategy

There is an emotional acceptance of cycling as part of the broader transportation network in our urban centres. Openness to cycling is building; cycling is not a niche activity, but part of mainstream society. The challenge is in converting a broader acceptance and openness to behaviour.

At the core is a committed group of people riding for utility trips; a group of everyday people choosing to get from A to B by bike. On the periphery is a broader group of New Zealanders who cycle occasionally, but are open to the idea of riding more.

But what are the conditions, and how open are people, to driving a behaviour change?

IMPLICATION

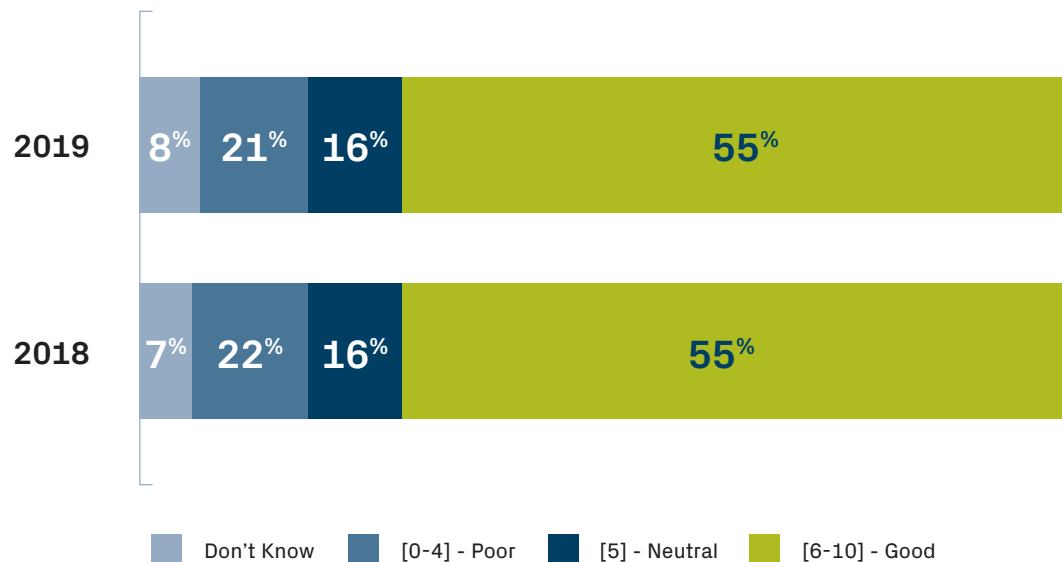


TRA



Overall, perceptions of the state of cycling remain encouraging with 55% viewing it positively

OVERALL STATE OF CYCLING – RATING (0-10)



Over half view cycling to be in a good state in their region.

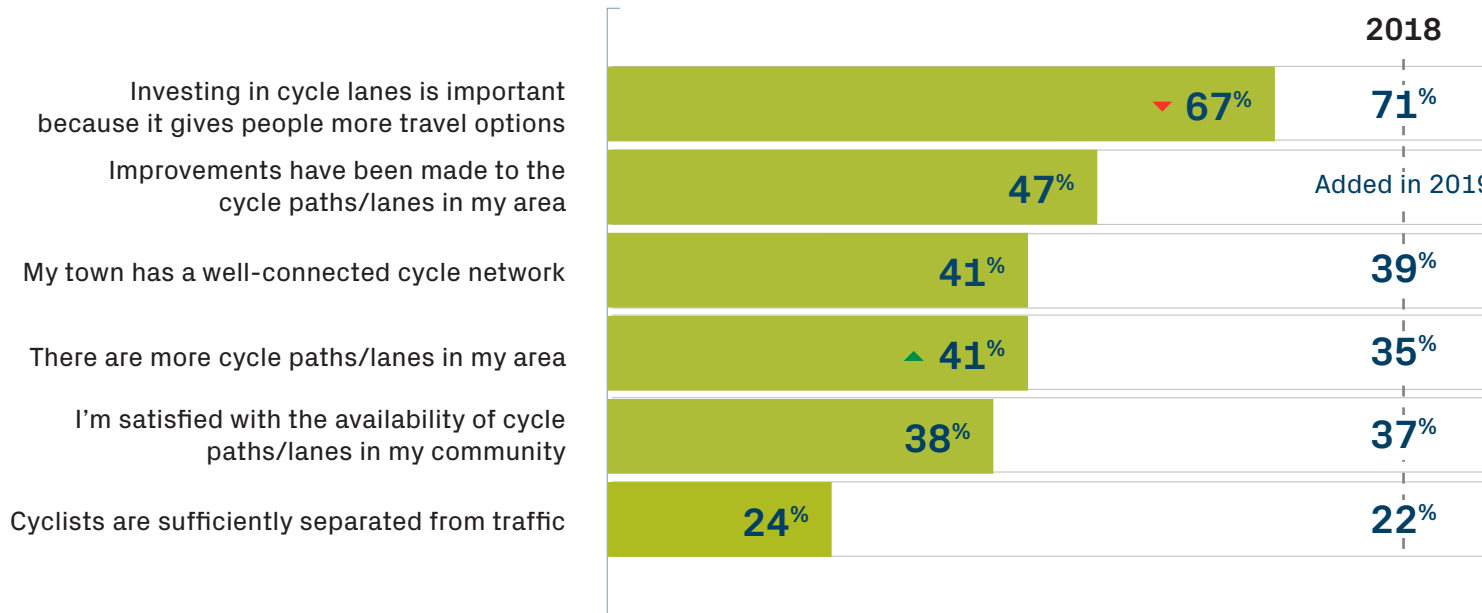
This is largely consistent across regions, however versus year ago, Christchurch has seen significant increases in the number of people viewing cycling as good (64% vs 57%).

*Q1. Overall, how do you view the current state of cycling in [your region]?
Base: Total sample, 2018 n=2,115, 2019 n=2,174*



People are now seeing the development and improvements of cycling infrastructure in their communities

PERCEPTIONS OF CYCLING INFRASTRUCTURE – (% Strongly agree / agree)



Half feel that improvements have been made. This is noticed more in Christchurch and Dunedin.

Overall, people are seeing significantly more cycle paths/lanes in their area than 2018. These developments are noticed more in Wellington, Christchurch, Tauranga and Dunedin.

Q7. How much do you agree or disagree with the following statements other people have made about cycling? [NET Strongly Agree + Agree]
 Base: Total sample: 2018, n=2,115 2019, n=2,174

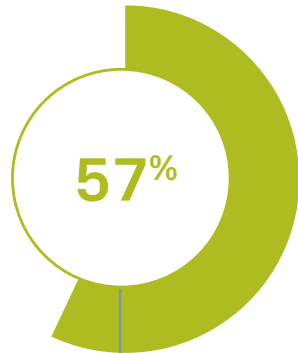
▲ Significantly higher than 2018 ▼ Significantly lower than 2018

The roll-out of cycling infrastructure across New Zealand plays a key role in enabling cycling in our urban centres



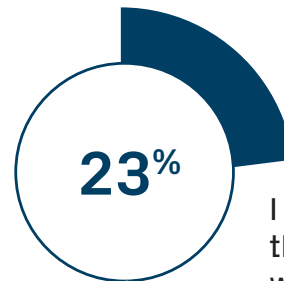
IMPACT OF CYCLING INFRASTRUCTURE ON BEHAVIOUR

CYCLISTS
(40% OF URBAN POPULATION)



I would cycle more than I currently do if the cycling infrastructure was improved

NON-CYCLISTS
(60% OF URBAN POPULATION)



I would start cycling if the cycling infrastructure was improved

39%*

Would start/cycle more if the cycling infrastructure was improved

Cycling infrastructure has a positive impact on both cyclists and non-cyclists to encourage people to cycle more or to start cycling.

Infrastructure provides a safer environment for cyclists, but also supports normalisation and acceptance.

Q15. To what extent do you agree, or disagree, with the following statement? [NET Strongly Agree + Agree]

Base: Total cyclists n= 854, Non-cyclists n=982

*combined % of I would cycle more than I currently do if the cycling infrastructure was improved (cyclists) and I would start cycling if the cycling infrastructure was improved (Non-cyclists)



The foundations are in place for cycling within our communities

The last few years have seen the opening of a number of new paths and cycle-ways to help build out our urban cycle networks, and people are now starting to take notice of the changing landscape within their communities.

While infrastructure helps create a safe space for current riders, it also plays an important role for the broader community;

- a) It helps create safer travel spaces overall
- b) It normalises cycling behaviour and drives social acceptance

Being able to change public perceptions of cycling around infrastructure programmes is important in influencing behaviour change.

But what will drive a significant shift in how people move about their cities?

IMPLICATION



4

Continuing to grow urban walking & cycling in NZ

TRA

The 'car' continues to be the predominant mode of transport in New Zealand

REGULAR MODES OF TRANSPORTATION –
AT LEAST ONCE A WEEK



used a car/PMV at
least once a week

*Q23b. And which of the following do you regularly use, e.g. once a week or more often? This can be for any reason, including work, sport or recreation.
Base: Total sample, 2019 n=2,174 *walking 100m or crossing the road*



Roading developments continue to reinforce existing behaviour

INCLUDING:

- 20CONNECT
- WAIKATO EXPRESSWAY
- BAYPARK TO BAYFAIR LINK
- TRANSMISSION GULLY
- CHRISTCHURCH MOTORWAYS
- SH1 DUNEDIN TO MOSGIEL





That said, developments have also been made to infrastructure for walking and cycling at both a national and local level

INCLUDING:

- **WHANGAREI**
Kamo shared path
- **AUCKLAND**
Waterview shared path
Northcote Safe Cycle Route
- **PALMERSTON NORTH**
He Ara Kotahi
- **WELLINGTON**
Ngauranga to Petone pathway
Wainui Hill shared path
Petone to Melling shared path
- **CHRISTCHURCH**
Heathcoate Expressway
Quarryman's Trail cycleway
- **DUNEDIN**
One way pair cycle lanes



There are external factors which influence the way we think about travel

CLIMATE CHANGE



Increasing conversations and awareness of climate change and the impact of travel, in particular fuel consumption and carbon emissions.

SUSTAINABILITY



Beyond climate change, there is also significant momentum behind sustainability – both at an over-arching level and in relation to transportation (social, environmental and climate).

This includes the emergence of e-transport options.

FUEL COSTS



Despite some stabilisation in fuel costs over the past year, people are still concerned about the cost of driving and the burden on individual, family and business.

And emerging ways to travel create alternative ways to get around

RIDE-SHARING SERVICES



WHEELED DEVICES



10% of people have used an e-scooter in the past 12 months

E-scooter use. Q23a. Which of the following have you used in the past 12 months? This can be for any reason, including work, sport or recreation. Base: Total sample n=2,174

This creates an environment ready for change

Understanding the context in which people are making decisions about how they travel is important to truly understand human behaviour.

Many of these factors are things that cannot be controlled, but they can be accounted for.

Roading developments will continue to reinforce existing behaviour.

Similarly, there are factors at play that can start to disrupt the status quo.

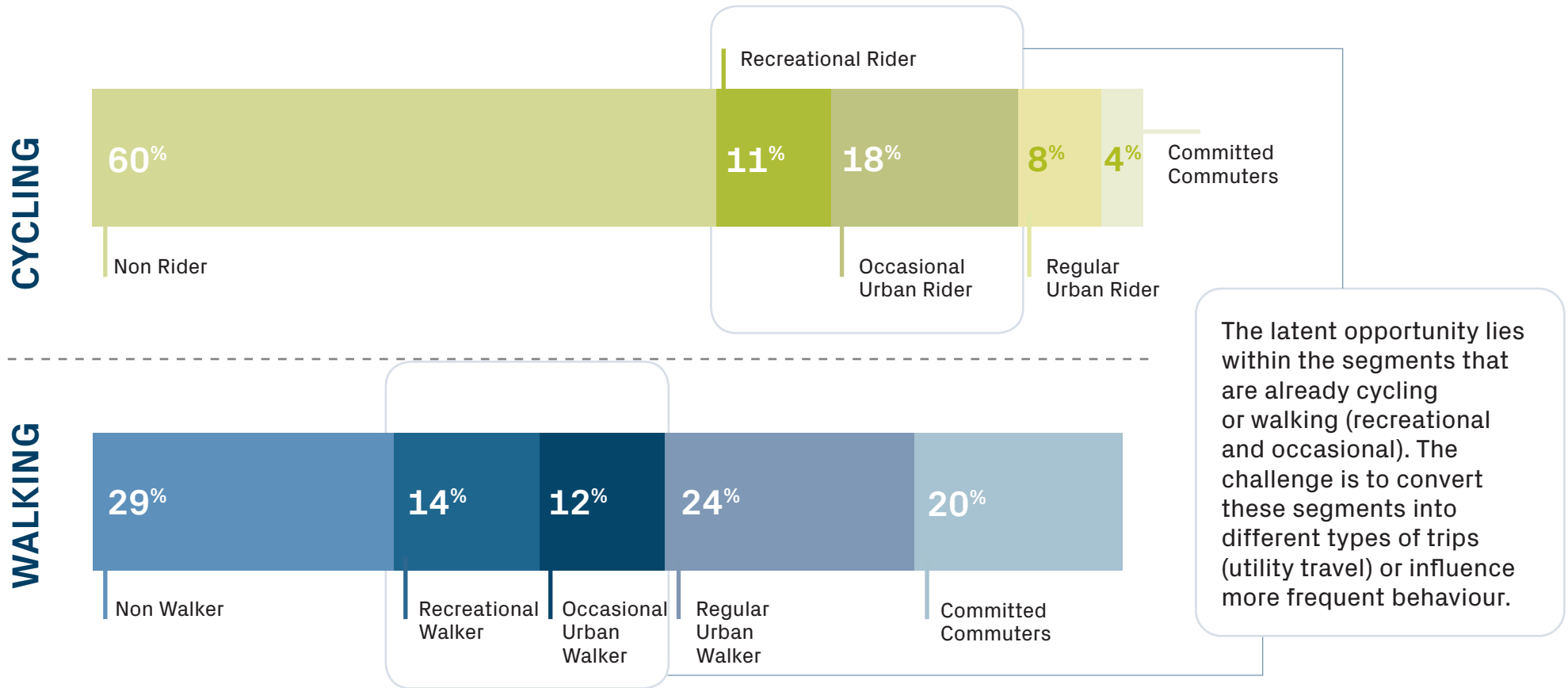
While no single factor will directly influence cycling and walking behaviours, they de-stabilise the travel landscape and create an environment ready for change.

IMPLICATION



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The segmentation framework helps identify where the more significant gains can be made to drive behaviour change



Q23a. Which of the following have you used in the past 12 months? (NON WALKER) 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, 2018 n=2,115, 2019 n=2,174. *walk 100m or cross the road See definitions in appendix

The overall drivers and barriers to walking and cycling are well understood; they remain constant over time

DRIVERS



WALKING – DRIVERS & BARRIERS (TOP 5)

- Keeps me fit/helps me get fitter
- It's fun, I enjoy walking
- Allows me to enjoy the weather
- It's cheaper/saves money
- Provides me with some 'me time'



CYCLING – DRIVERS & BARRIERS (TOP 5)

- Keeps me fit/helps me get fitter
- It's fun, I enjoy cycling
- It's cheaper/saves money
- Allows me to enjoy the weather
- Provides me with some 'me time'

Across our opportunity segments (recreational and occasional) safety is the key barrier to overcome - **even more so for occasional and recreational travellers.**

BARRIERS

- It's not enjoyable because of the weather
- Walking is not a quick way for me to get where I need to go
- I don't feel safe walking in the dark
- I live too far away for it to be practical
- I always have too much stuff to carry

- I don't feel safe because of how people drive
- I don't feel safe cycling in the dark
- I'm concerned about the speed of other road users
- It's not enjoyable because of the weather
- I always have too much stuff to carry

Q33. Base: Total walkers n=1,537

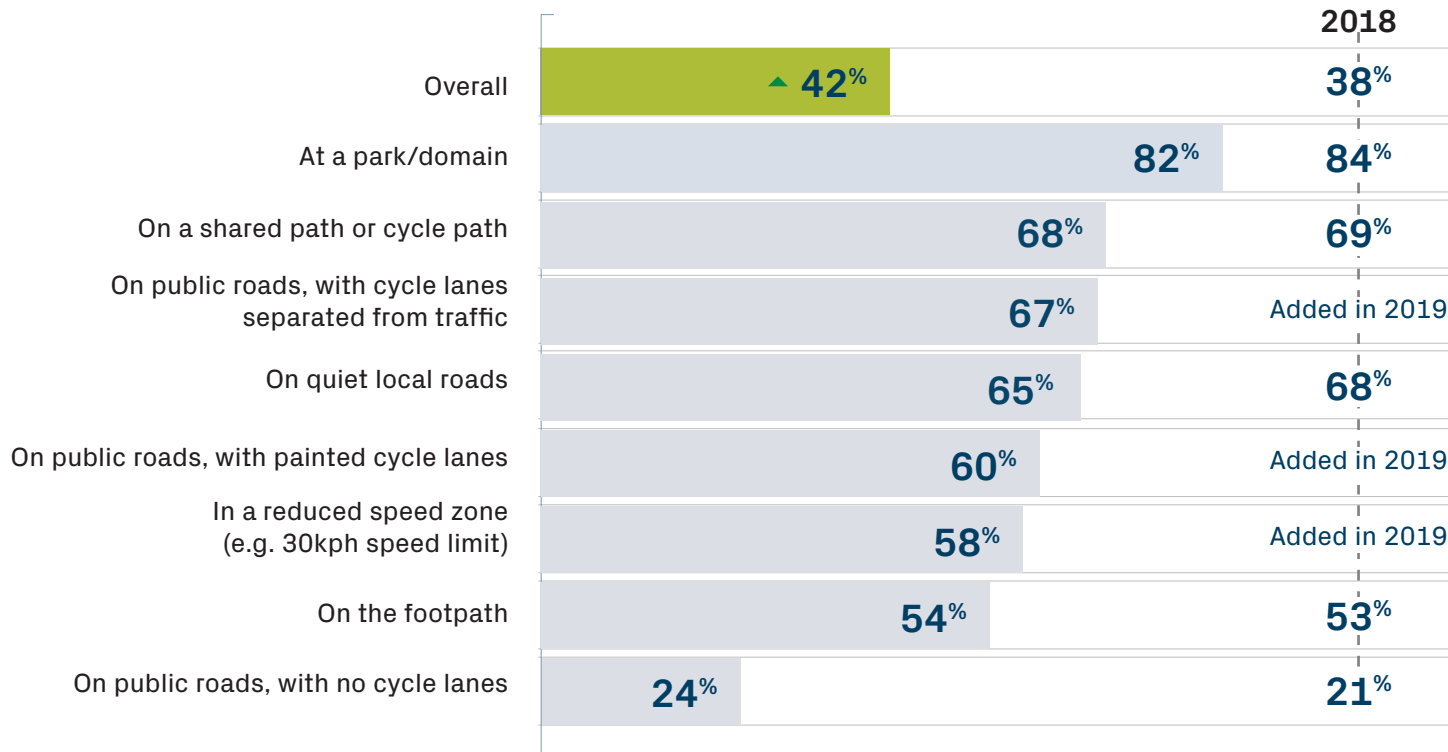
Q34. Base: Physically able to walk n=1,826

Q11a. Base: Total cyclists n=854

Q11b. Base: Physically able to cycle n=1,836 Top 5. – based on % mentions

Creating a safe environment for cyclists in different environments is vital to creating a connected network

PERCEPTIONS OF CYCLE SAFETY – NET SAFE (6-10)



Overall safety perceptions have improved significantly since 2018.

There have been no significant shifts across different types of infrastructure during this period, however.

- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018

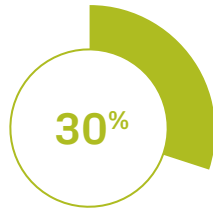
A5. In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10] Base: Physically able to cycle 2018 n=1841, 2019 n=1836

But it is also how people behave within those environments

Monitored behaviours remain relatively consistent over time

ROAD USER BEHAVIOURS - SEE THIS HAPPEN A LOT / ALL THE TIME

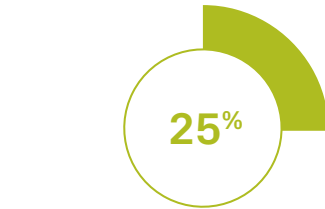
CYCLISTS



Indicating with hand signals when turning

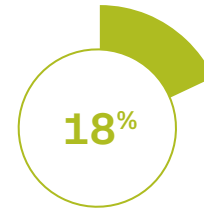
2018

35%



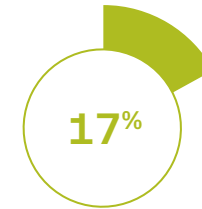
Riding in the centre of a lane when approaching intersections and roundabouts so they can be clearly seen*

Wording changed



Groups/pairs moving into a single line to let vehicles pass

18%

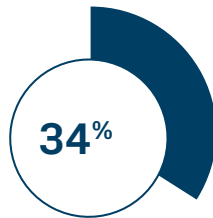


Riding in the centre of a lane, but pulling in to the left and letting people past when they can safely*

Wording changed

Fewer people perceive drivers driving too close to cyclists - a positive change.

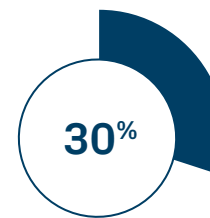
DRIVERS



Driving too close to cyclists

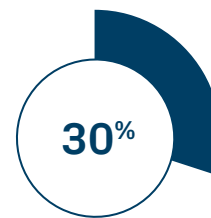
2018

37%



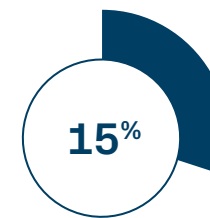
Dangerous overtaking of cyclists

30%



Opening car doors without looking for cyclists

30%



Using the horn at cyclists/ jeering and/or yelling at cyclists

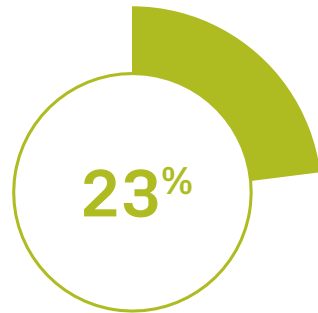
15%

▲ Significantly higher than 2018
▼ Significantly lower than 2018

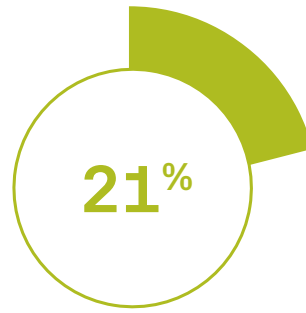
Q21. How often do you see the following behaviour on the road from motorists?
Q22. How often do you see the following behaviour on the road or a shared path, from cyclists?
Base Total sample: 2018, n=2,115 2019, n=2,174
*wording changed from 2018

Positive behaviours on shared paths play a key role in ensuring cyclists feel safe

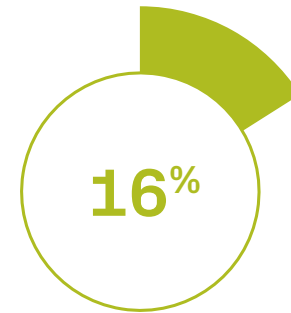
SHARED PATH BEHAVIOURS - SEE THIS HAPPEN A LOT / ALL THE TIME



Giving a safe amount of space when riding near pedestrians on shared paths



Slowing down on shared paths when approaching pedestrians



Using bells on shared paths to let pedestrians know they are approaching

These behaviours are more likely to be observed among urban and recreational cyclists, who have a higher propensity to be in these environments.

	Giving a safe amount of space when riding near pedestrians on shared paths	Slowing down on shared paths when approaching pedestrians	Using bells on shared paths to let pedestrians know they are approaching
URBAN CYCLIST	33%	33%	24%
RECREATIONAL CYCLIST	29%	23%	29%

Q22X. How often do you see the following behaviour on a shared path, from cyclists? Base Total sample: 2019, n=2,174

Current activity supports the drive for behaviour change

In the context of societal change, such as the desire to get closer to nature and the way we now live in urban environments, there is the potential to build on the current openness to urban walking and cycling.

IMPLICATION



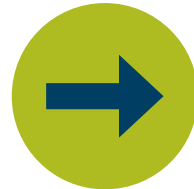
5

Regional perspective

TRA

Driving a significant change in behaviour is a long term programme of work

SUCCESS OF INITIATIVES AT A LOCAL LEVEL IS CRITICAL TO DRIVING THIS SHIFT.



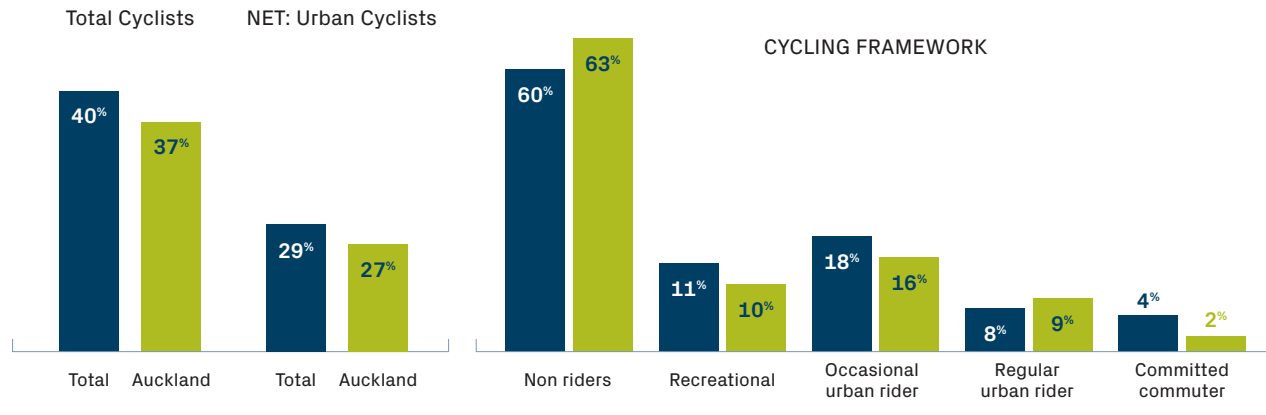
Nationally there are similarities in current behaviour and perceptions but there are some underlying differences.



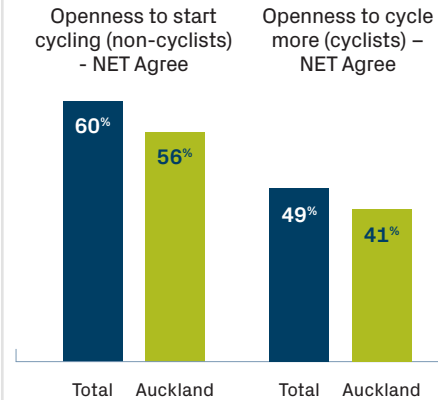
A snapshot of the Auckland region – Cycling



CYCLING BEHAVIOUR

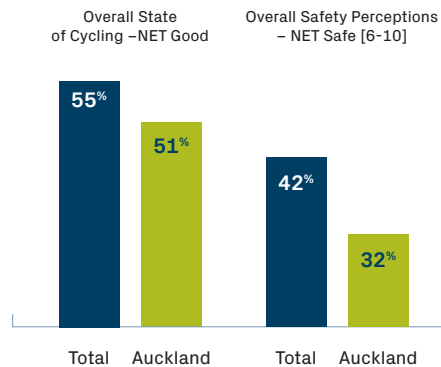


FUTURE BEHAVIOUR

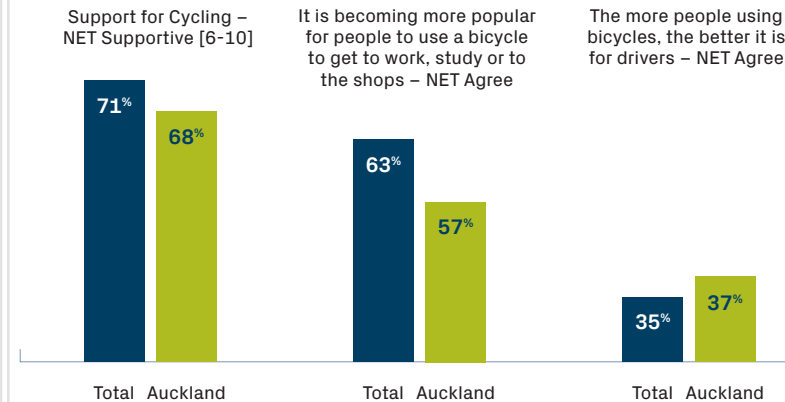


Cycling in Auckland looks very similar to cycling overall in New Zealand with no significant difference.

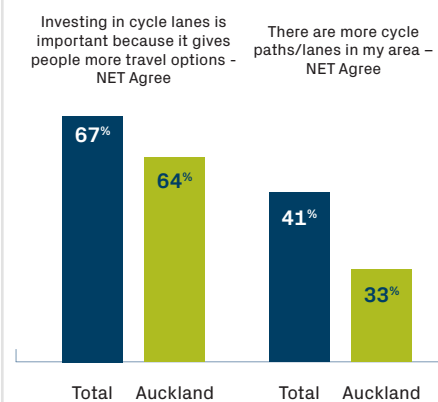
PUBLIC PERCEPTION



COMMUNITY SUPPORT



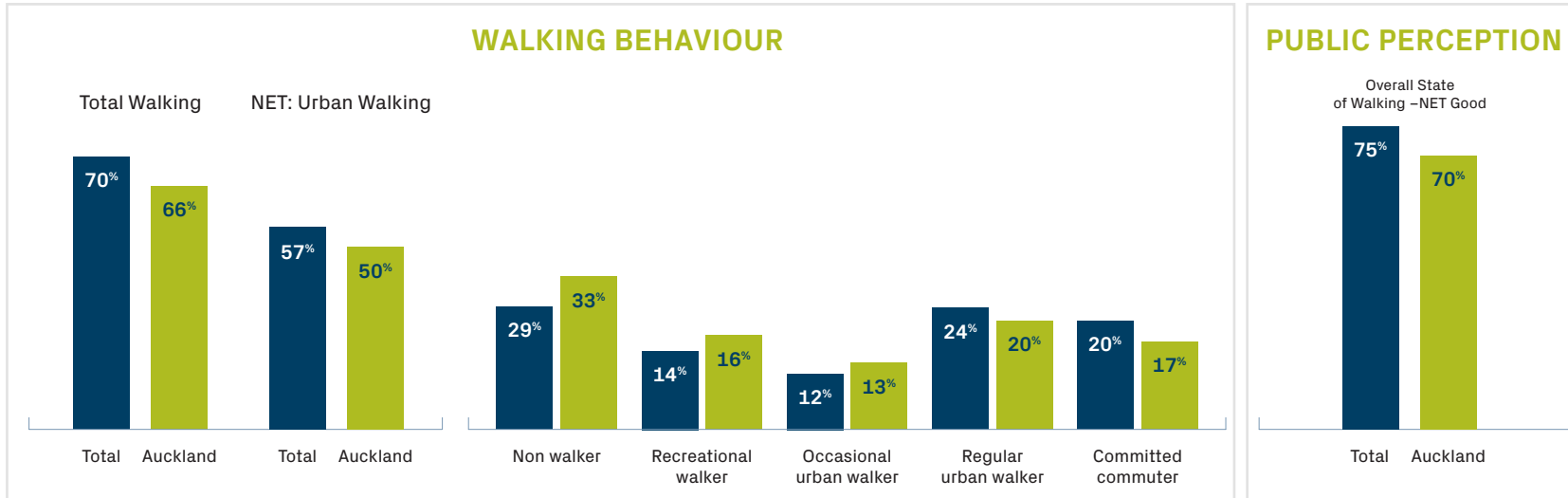
INFRASTRUCTURE



Year on year we see also see no change within the Auckland region.

- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

A snapshot of the Auckland region – Walking



Similarly, for walking we see no significant differences to the total or year on year

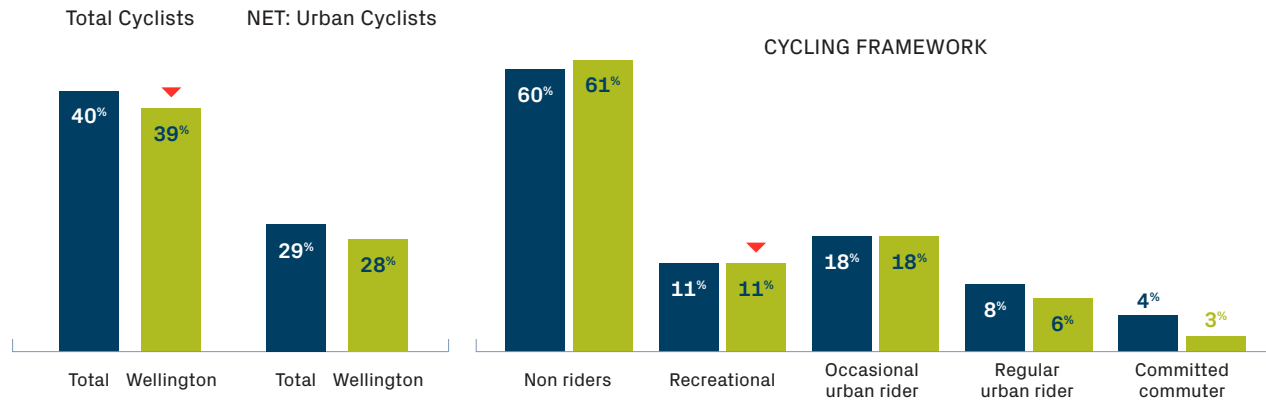
- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

Base: Total sample n=2,174 Auckland n=530

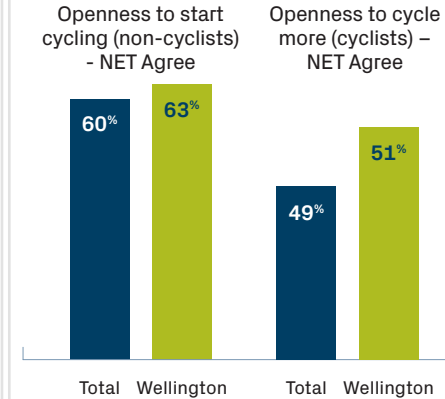
A snapshot of the Wellington region – Cycling



CYCLING BEHAVIOUR

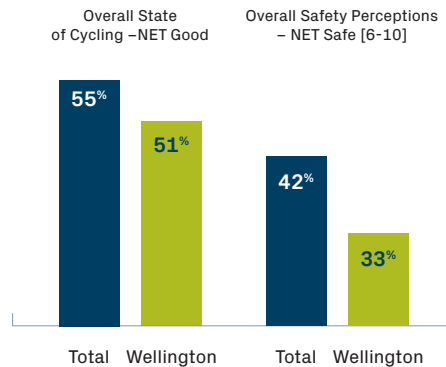


FUTURE BEHAVIOUR

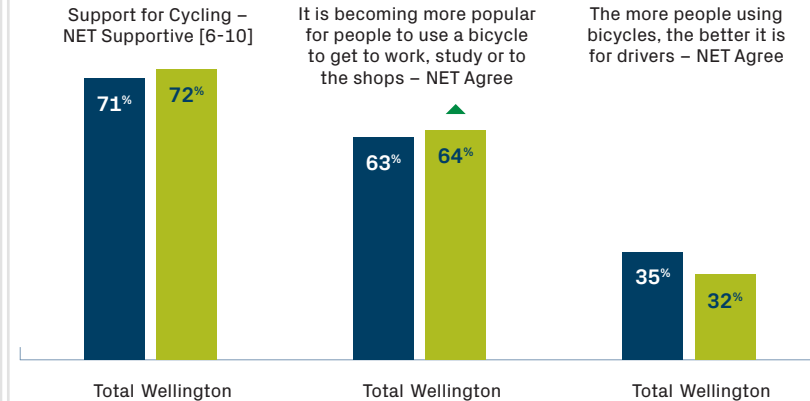


There has been a decline in total cyclists since 2018, driven by recreational cyclists. Despite this decline versus a year ago, cycling levels are in line with the average across New Zealand.

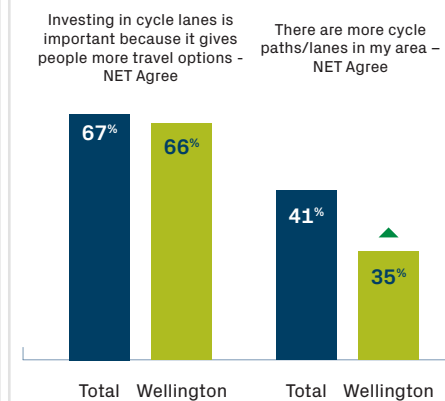
PUBLIC PERCEPTION



COMMUNITY SUPPORT



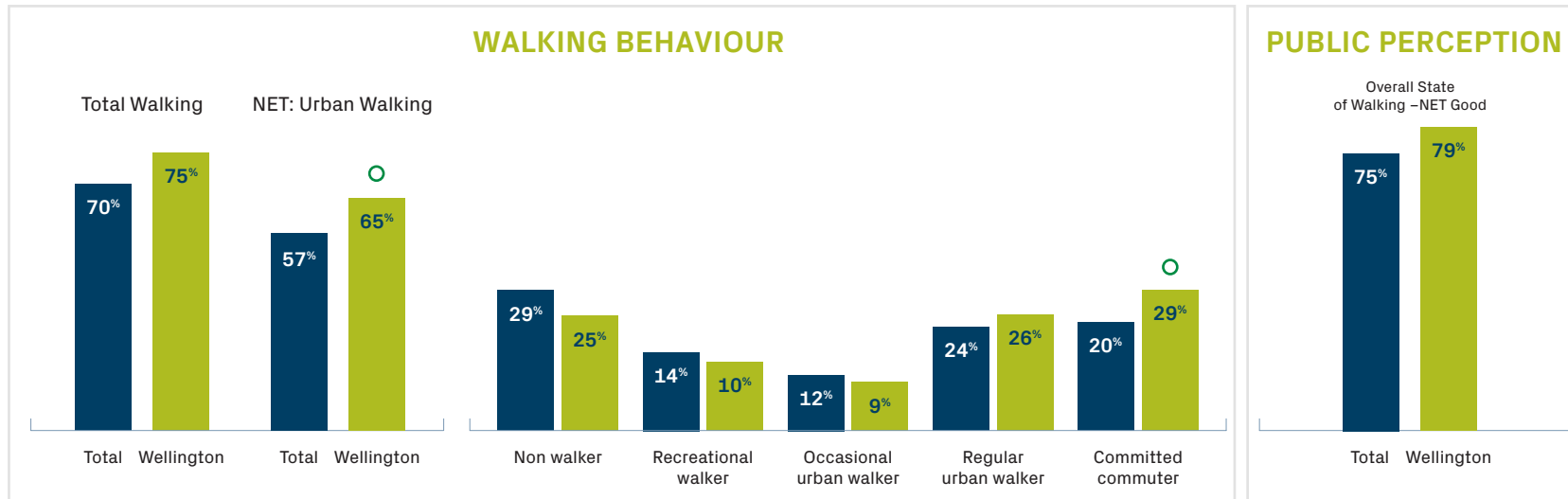
INFRASTRUCTURE



There has been an increase in popularity and the perception that there are more cycle paths/lanes since 2018.

- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

A snapshot of the Wellington region – Walking



Wellington has a higher level of urban walking and, in particular, committed commuters when compared to the overall. This is consistent with 2018.

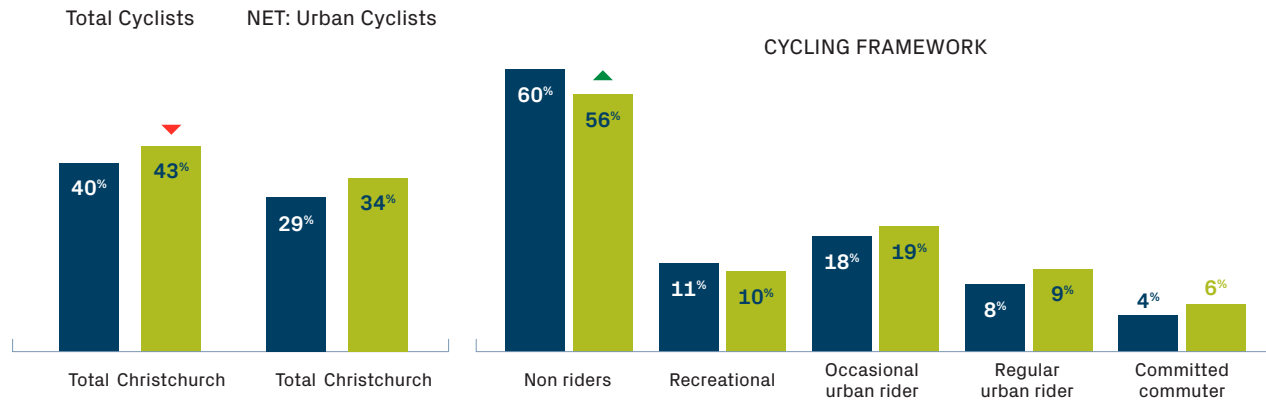
- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

Base: Total sample n=2,174 Wellington n=505

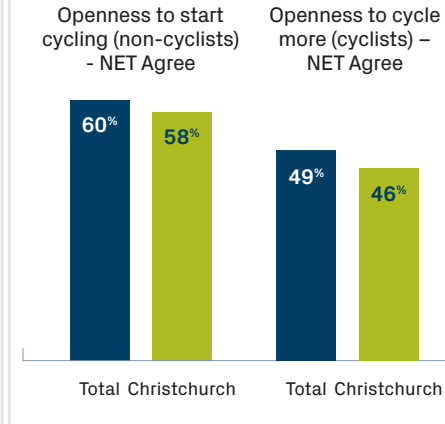
A snapshot of the Christchurch region – Cycling



CYCLING BEHAVIOUR



FUTURE BEHAVIOUR

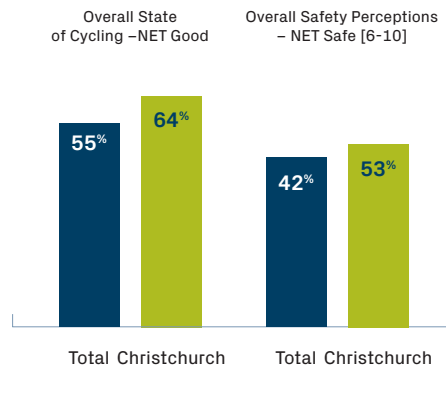


Total cyclist levels in Christchurch have declined versus 2018. This is driven by an increase in non riders.

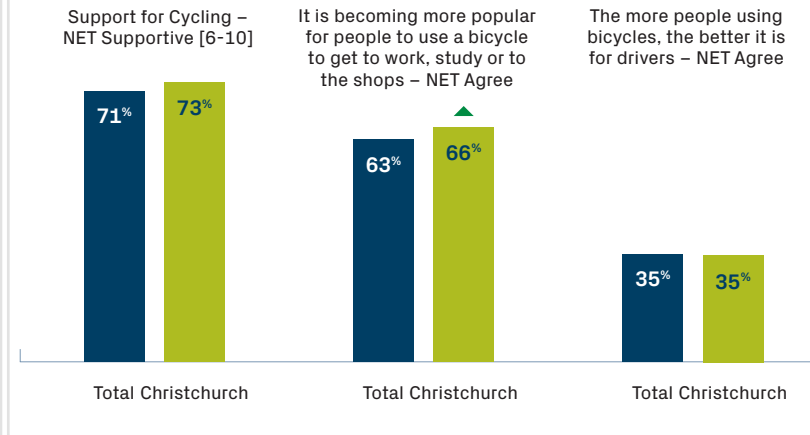
Despite this drop there has been an improvement in perceptions of the overall state of cycling, with residents seeing an increase in popularity and more cycle paths/lanes.

- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

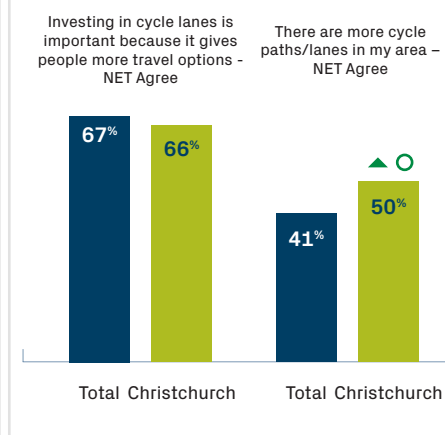
PUBLIC PERCEPTION



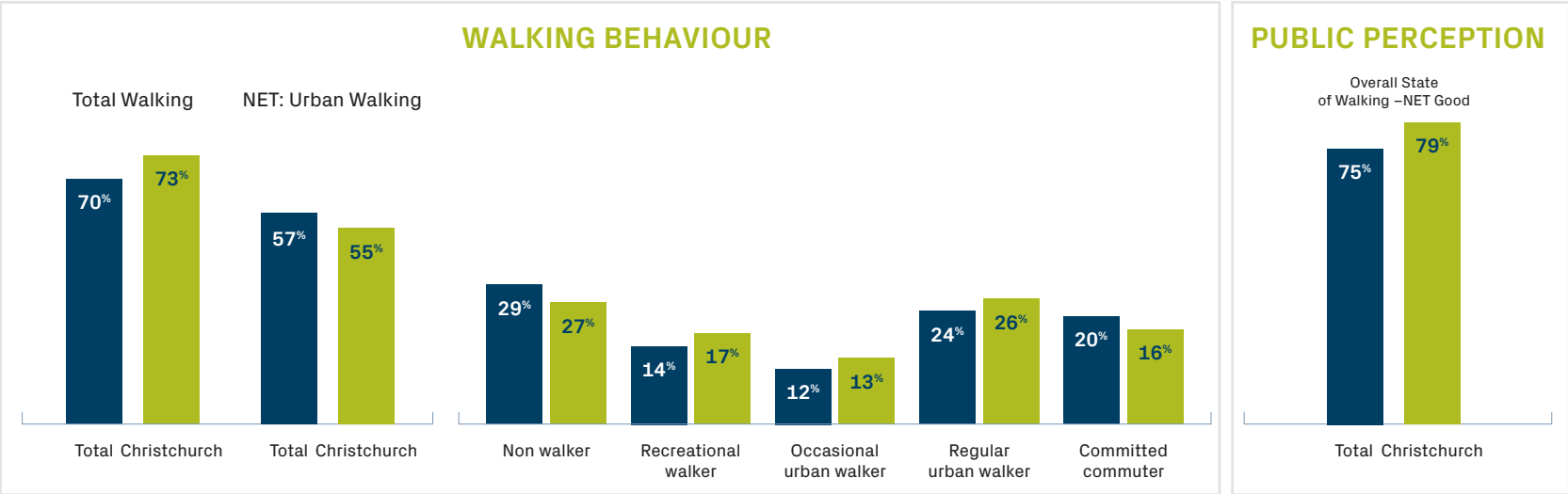
COMMUNITY SUPPORT



INFRASTRUCTURE



A snapshot of the Christchurch region – Walking



Walking in Christchurch looks similar to overall walking in New Zealand. There are no changes when compared to 2018.

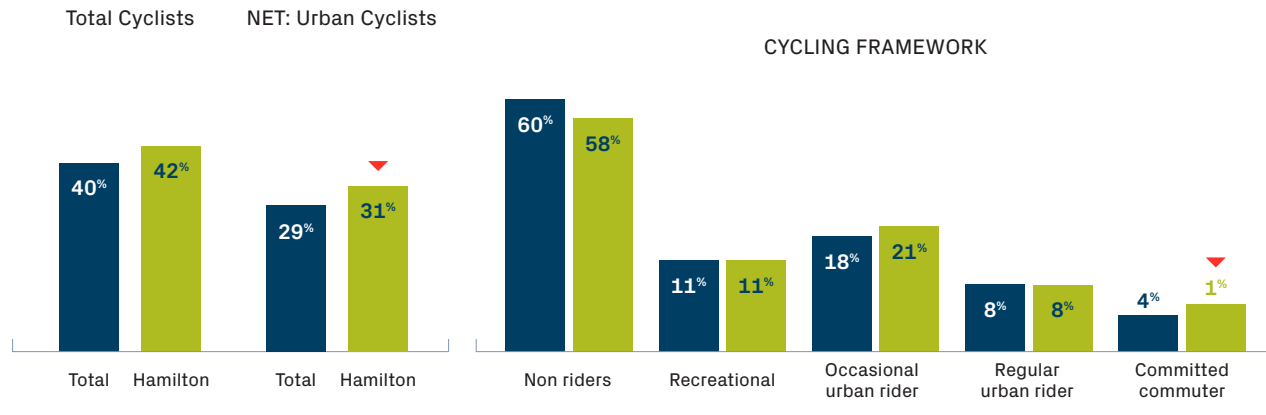
- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

Base: Total sample n=2,174 Christchurch n=520

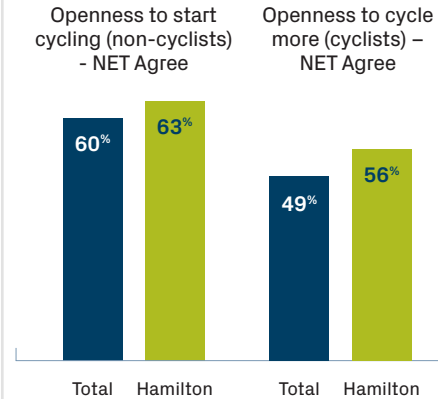
A snapshot of the Hamilton region – Cycling



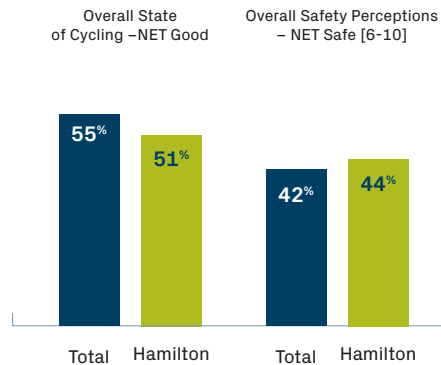
CYCLING BEHAVIOUR



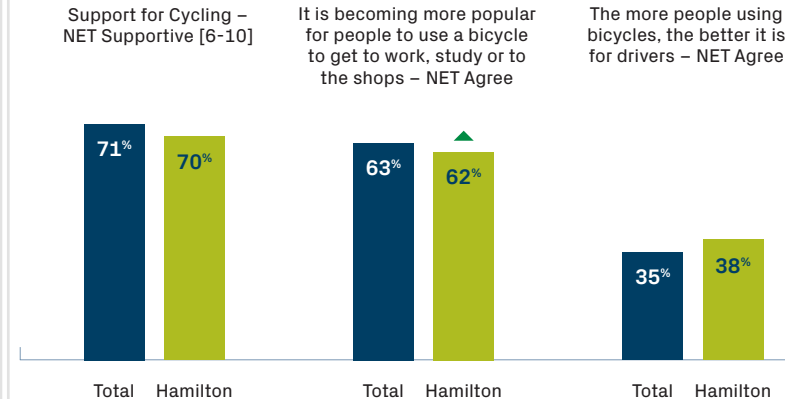
FUTURE BEHAVIOUR



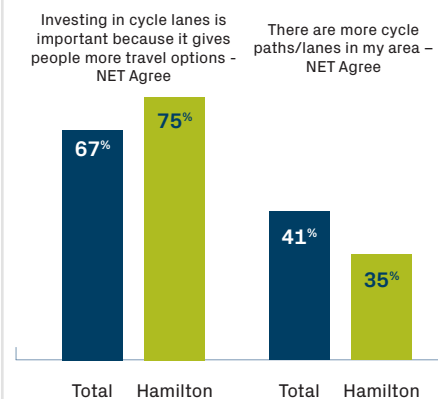
PUBLIC PERCEPTION



COMMUNITY SUPPORT



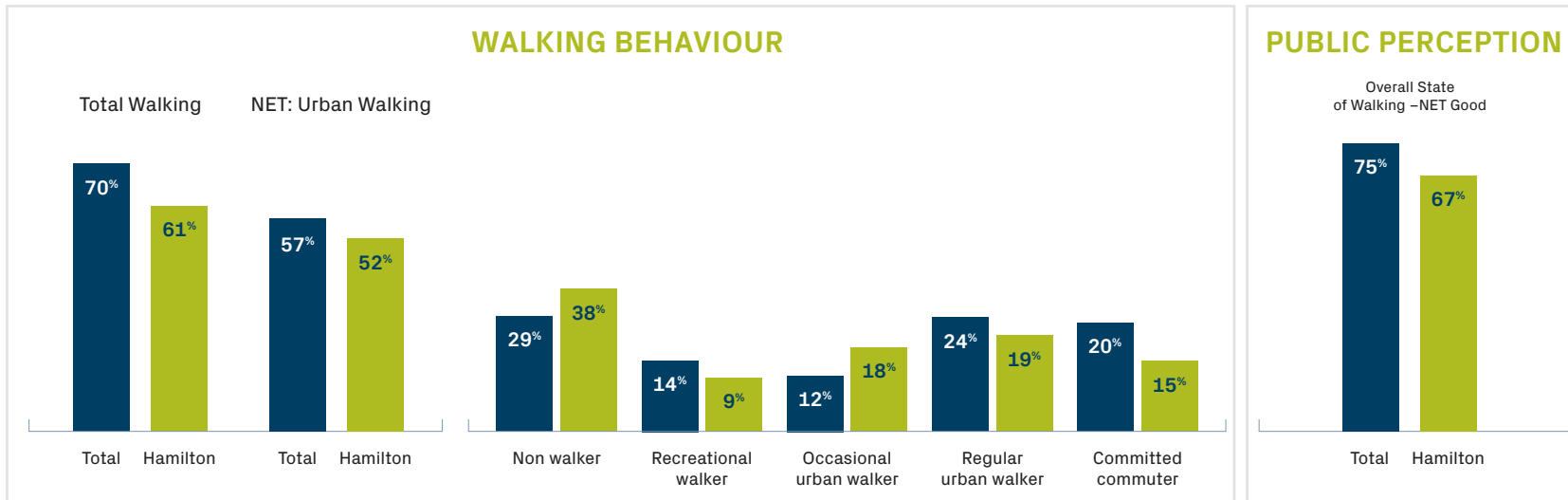
INFRASTRUCTURE



There has been a decrease in urban cyclists in Hamilton driven by a decrease of committed commuters. However, the perception that cycling is becoming more popular has increased since 2018.

- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

A snapshot of the Hamilton region – Walking



Walking in Hamilton looks similar to overall walking in New Zealand. There are no year on year changes.

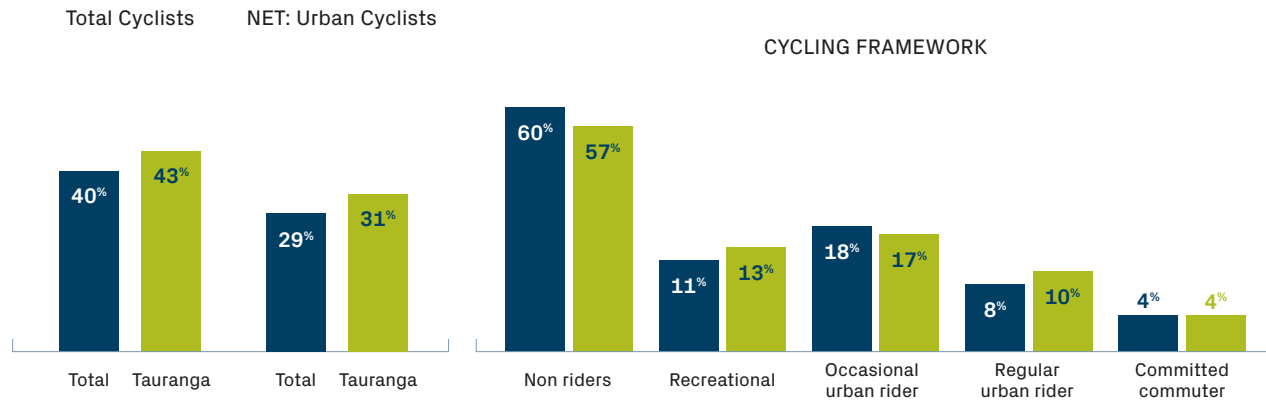
- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

Base: Total sample n=2,174 Hamilton n=207

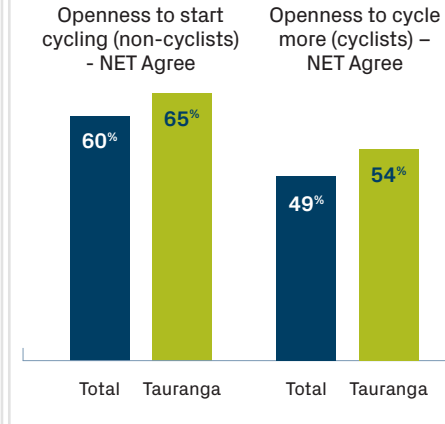
A snapshot of the Tauranga region – Cycling



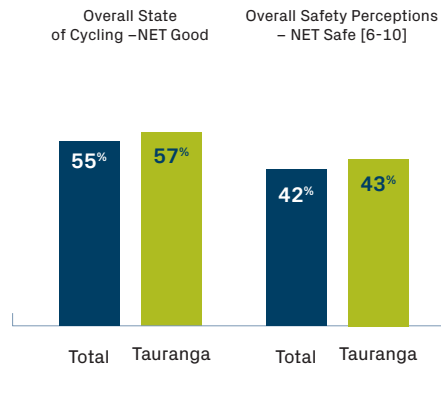
CYCLING BEHAVIOUR



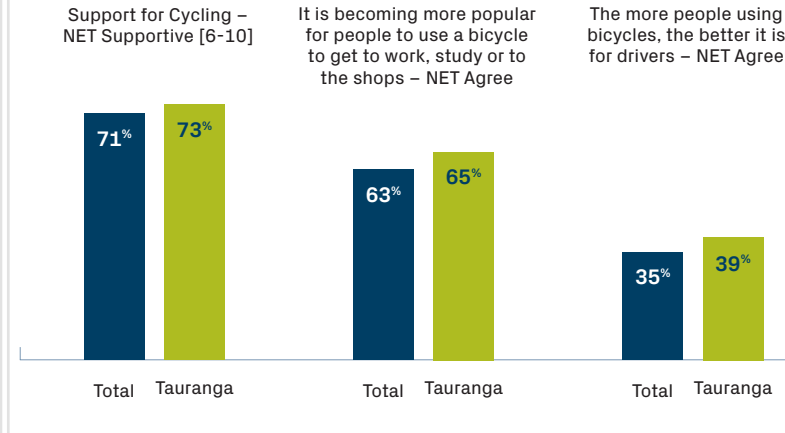
FUTURE BEHAVIOUR



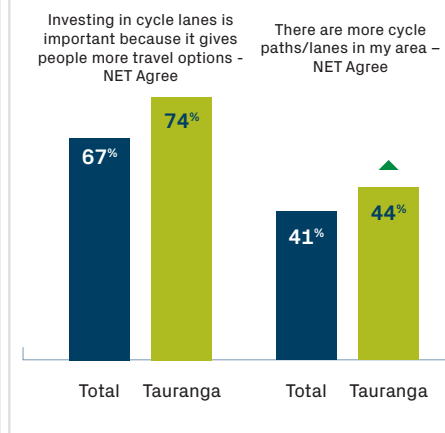
PUBLIC PERCEPTION



COMMUNITY SUPPORT



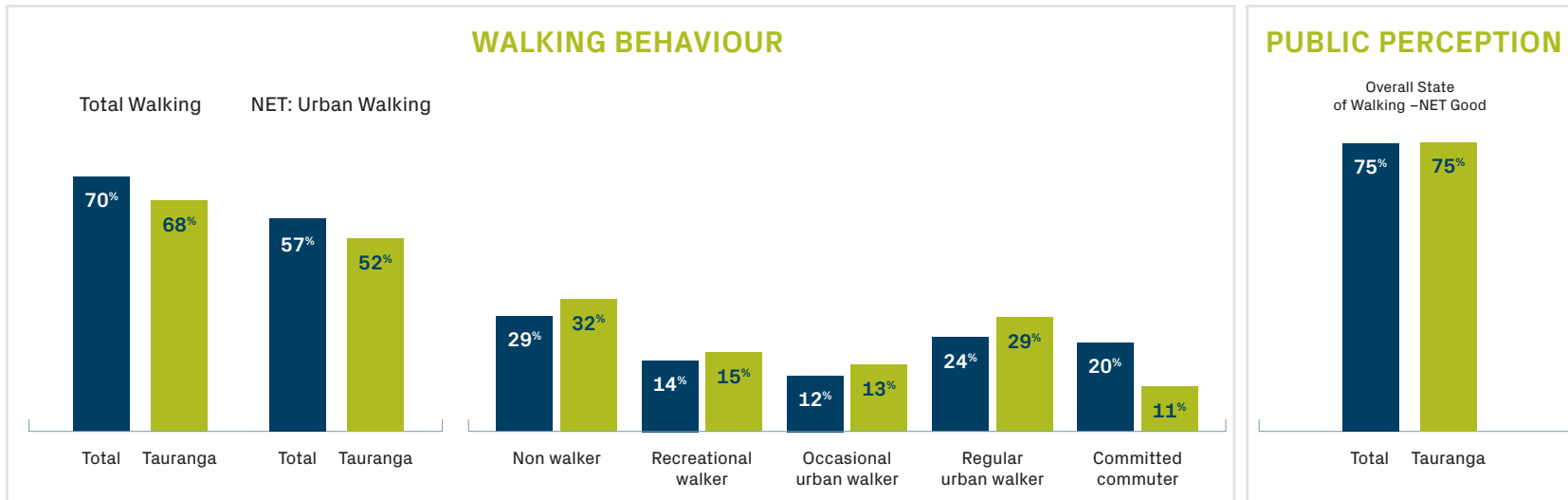
INFRASTRUCTURE



Cycling in Tauranga remains stable over time but there has been an increase in the perception that there are more cycling paths/lanes in the area.

- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

A snapshot of the Tauranga region – Walking



Similarly to cycling in Tauranga, walking remains consistent over time.

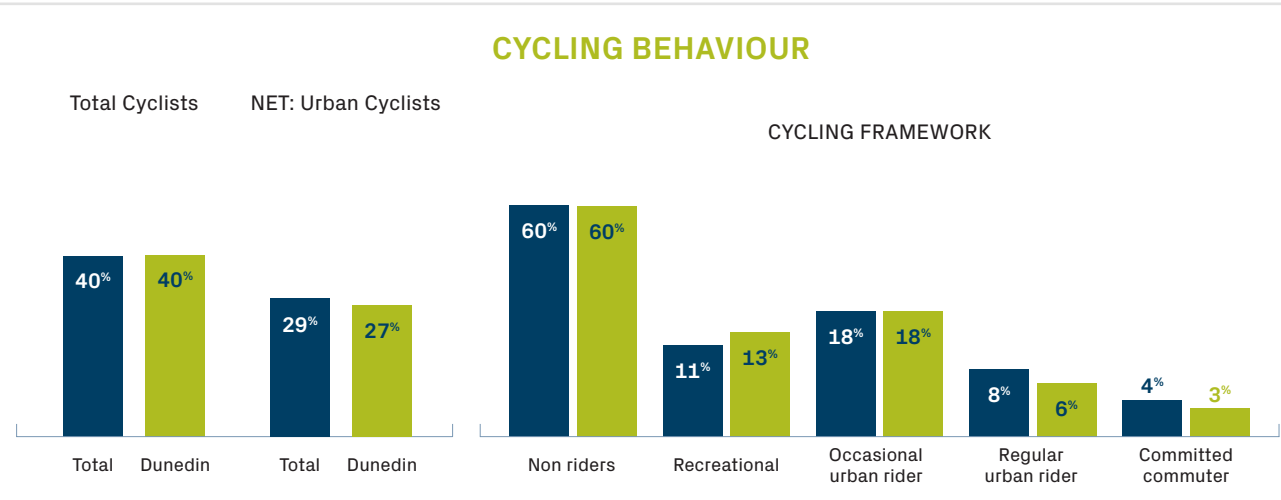
- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

Base: Total sample n=2,174 Tauranga n=205

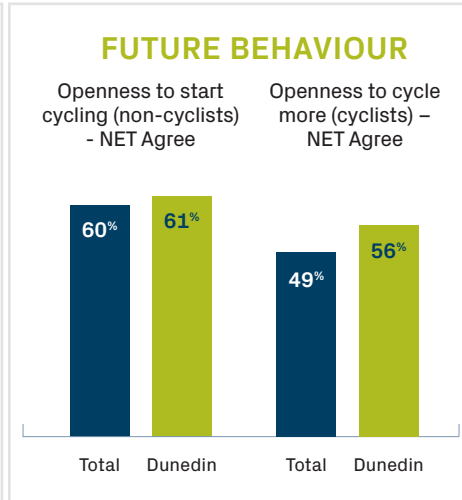
A snapshot of the Dunedin region – Cycling



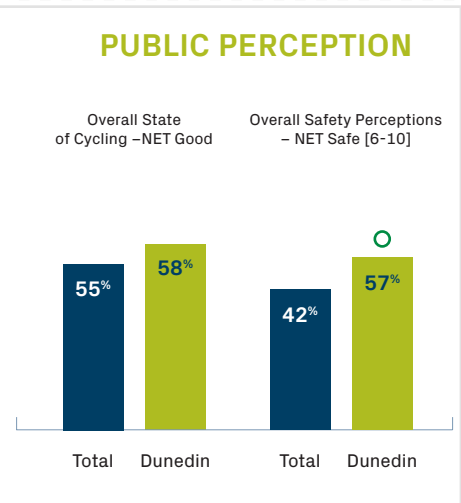
CYCLING BEHAVIOUR



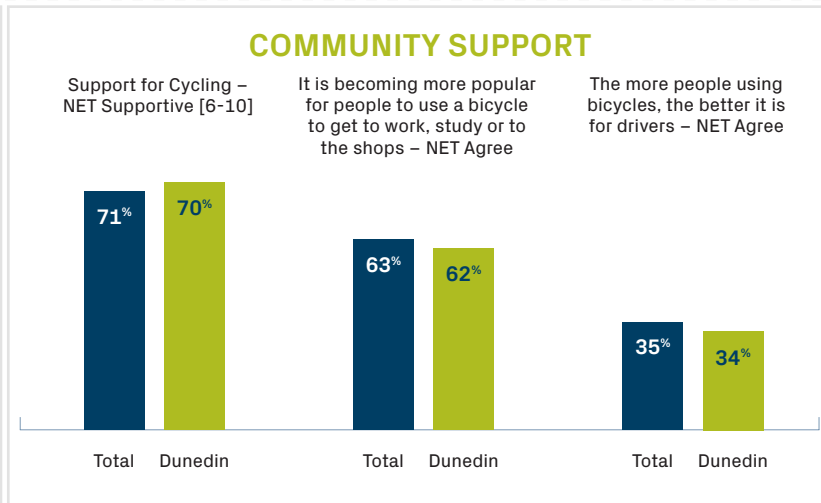
FUTURE BEHAVIOUR



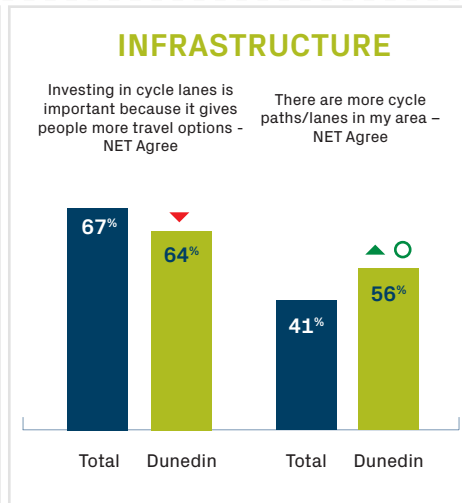
PUBLIC PERCEPTION



COMMUNITY SUPPORT



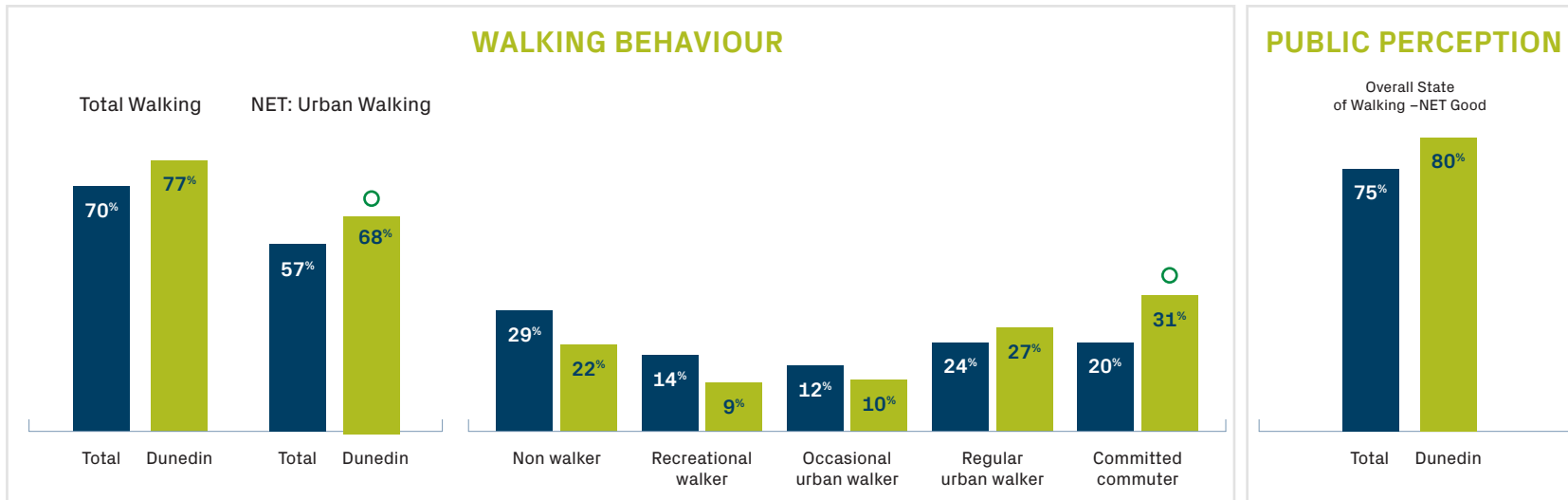
INFRASTRUCTURE



Dunedin has the highest overall safety perception across the main urban centres in New Zealand; this is consistent with 2018. There has been an increase in the perception that there are more cycle paths / lanes in the area but the importance of investing in cycle lanes has declined.

- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

A snapshot of the Dunedin region – Walking



Dunedin has the highest levels of urban walking within their region driven by committed commuters.

- ▲ Significantly higher than 2018
- ▼ Significantly lower than 2018
- Significantly higher than total
- Significantly lower than total

Base: Total sample n=2,174 Dunedin n=207

6

Bringing it all together

TRA

**Across New Zealand
we are coming from a
positive position where
many New Zealanders
are already walking
and cycling as a means
of getting around
their cities.**

**We have openness from
which to build.**

**And the conditions are
right for change.**

But to drive a regional and national impact, continued and focused efforts are required

Across initiatives we are wanting to drive a greater uptake in urban walking and cycling.



**INFRASTRUCTURE
IMPROVEMENTS**



POLICY CHANGE



EDUCATION



**PROMOTIONAL
ACTIVITY**

Appendix

TRA

Segment definitions

CYCLING

This segmentation framework differentiates people based on the type of cycling they do.

This identifies cyclists based on how frequently they travel by foot for certain trips.

- **Less supportive non rider** = Cycle not very often / not at all and disagree that cycling is a great way to get around
- **Supportive non rider** = Cycle not very often / not at all and agree that cycling is a great way to get around
- **Recreational off road** = Cycle for recreational purposes not on roads / cycle paths
- **Recreational on road** = Cycle for recreational purposes on roads / cycle paths
- **Occasional urban rider** = Cycle to/from work/study or to get around town a few times a month or not very often
- **Regular urban walker** = Cycle to/from work/study or to get around town once or twice a week or every few days
- **Committed commuter** = Cycle to/from work/study or to get around town most days

WALKING

This segmentation framework differentiates people based on the type of walking they do.

This identifies walkers based on how frequently they travel by foot for certain trips.

- **Non walker** = Haven't walked* in the last 12 months
- **Recreational walker** = Walk for recreational purposes
- **Occasional urban walker** = Walk to/from work/study or to get around town a few times a month or not very often
- **Regular urban walker** = Walk to/from work/study or to get around town once or twice a week or every few days
- **Committed commuter** = Walk to/from work/study or to get around town most days

Motivators to cycling....

REASON	TOTAL	AUCKLAND	WELLINGTON	CHRISTCHURCH	HAMILTON	TAURANGA	DUNEDIN
Keeps me fit/helps me get fitter	62%	51%	61%	70%	63%	66%	66%
It's fun, I enjoy cycling	59%	55%	60%	58%	59%	63%	57%
It's cheaper/saves money	44%	38%	41%	54%	42%	37%	43%
Allows me to enjoy the weather	33%	30%	39%	33%	29%	34%	34%
Provides me with some 'me time'	33%	29%	33%	36%	34%	30%	38%
Helps address environmental concerns	28%	25%	28%	34%	17%	33%	26%
Avoids parking hassles	27%	22%	29%	33%	16%	30%	24%
Saves time - I can get there faster by bike	20%	19%	20%	23%	15%	14%	22%
Availability of cycle ways or cycle paths	18%	20%	17%	17%	19%	20%	22%
More convenient than driving/public transport	18%	19%	13%	22%	14%	19%	18%
Too much traffic to drive - helps reduce traffic congestion	16%	19%	12%	15%	17%	21%	16%
Separate off-road paths make it safer to cycle	16%	13%	15%	18%	20%	14%	15%
Painted cycle lanes make it safer to cycle	15%	19%	8%	17%	17%	19%	16%
Better routes are available than previously	13%	18%	8%	14%	13%	16%	12%
More consistent travel time	12%	15%	9%	13%	10%	10%	13%
Want to make the most of a new bike	11%	17%	7%	9%	8%	10%	13%
There's physical barriers between motorists & cyclists	8%	11%	2%	10%	6%	9%	10%
To get to/from public transport	7%	9%	7%	6%	6%	4%	4%
Availability of cycle parking at public transport interchanges/stations	6%	9%	4%	7%	4%	8%	4%
Other	6%	4%	6%	6%	5%	10%	9%

■ Significantly higher than total
■ Significantly lower than total



Barriers to cycling....

REASON	TOTAL	AUCKLAND	WELLINGTON	CHRISTCHURCH	HAMILTON	TAURANGA	DUNEDIN
I don't feel safe because of how people drive	47%	53%	47%	44%	38%	49%	42%
I don't feel safe cycling in the dark	40%	47%	37%	39%	34%	42%	32%
I'm concerned about the speed of other road users	39%	41%	37%	39%	37%	47%	32%
It's not enjoyable because of the weather	33%	37%	37%	35%	27%	17%	31%
I always have too much stuff to carry	32%	36%	30%	33%	28%	24%	31%
Cycling is not a quick way for me to get where I need to go	29%	36%	25%	31%	29%	28%	23%
There's not enough cycle lanes or routes that are physically separated from drivers	28%	38%	34%	20%	25%	27%	14%
I live too far away for it to be practical	28%	29%	34%	27%	21%	23%	23%
I don't have access to a bike	28%	32%	30%	20%	23%	23%	35%
Having to shower and/or change after cycling is inconvenient	25%	30%	27%	22%	24%	20%	18%
There's no secure place to leave a bike when out and about	24%	27%	26%	20%	26%	21%	22%
It's not enjoyable because of the hills	23%	28%	34%	6%	13%	15%	43%
There's not enough painted cycle lanes on roads in my area	21%	30%	25%	16%	17%	20%	9%
I have to think about transporting other people	19%	20%	15%	20%	20%	17%	19%
I can't be bothered/too much effort	17%	18%	17%	16%	21%	13%	16%
I don't like wearing a helmet	14%	13%	13%	18%	17%	7%	14%
Some other reason	9%	6%	11%	11%	10%	7%	9%
I don't know enough about cycling or where to get information	6%	6%	8%	5%	6%	5%	5%

■ Significantly higher than total
■ Significantly lower than total



Motivators to walking....

REASON	TOTAL	AUCKLAND	WELLINGTON	CHRISTCHURCH	HAMILTON	TAURANGA	DUNEDIN
Keeps me fit/helps me get fitter	72%	70%	72%	74%	68%	75%	76%
It's fun, I enjoy walking	55%	54%	54%	56%	49%	63%	58%
Allows me to enjoy the weather	45%	39%	46%	47%	42%	54%	46%
It's cheaper/saves money	45%	39%	52%	47%	45%	28%	52%
Provides me with some 'me time'	43%	40%	43%	47%	36%	41%	51%
Avoids parking hassles	33%	30%	35%	32%	34%	27%	43%
Availability of paths/walking routes	26%	29%	28%	21%	22%	31%	29%
More convenient than driving/public transport	24%	22%	30%	20%	25%	16%	29%
Helps address environmental concerns	21%	19%	23%	21%	17%	18%	24%
Saves time - I can get there faster by walking	19%	16%	27%	13%	17%	15%	22%
There is no other way to get where I want to go	15%	17%	17%	12%	11%	9%	21%
Too much traffic to drive - helps reduce traffic congestion	14%	13%	16%	13%	14%	15%	17%
Better walking routes are available now	12%	13%	11%	10%	15%	13%	9%
Other	6%	6%	6%	8%	8%	9%	4%

Barriers to walking....

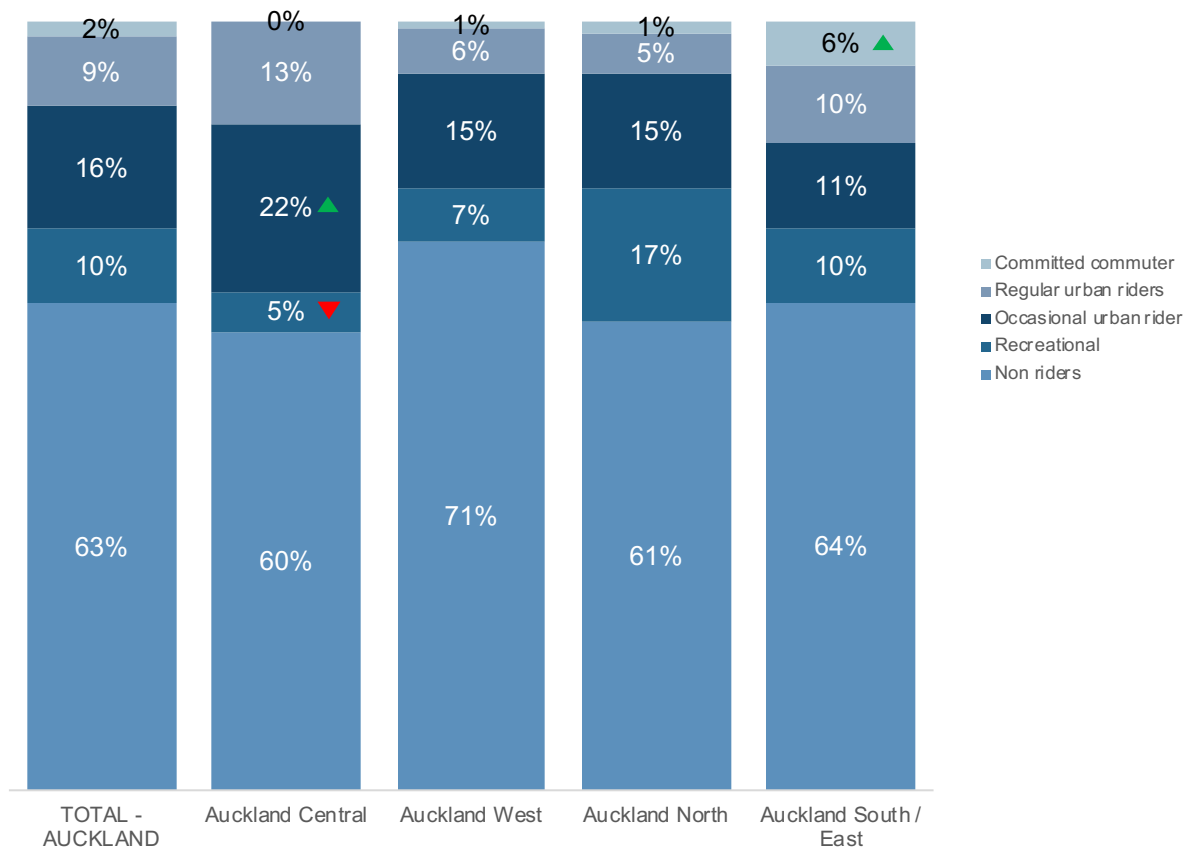
REASON	TOTAL	AUCKLAND	WELLINGTON	CHRISTCHURCH	HAMILTON	TAURANGA	DUNEDIN
It's not enjoyable because of the weather	31%	32%	37%	30%	30%	22%	28%
Walking is not a quick way for me to get where I need to go	31%	31%	26%	34%	36%	32%	31%
I don't feel safe walking in the dark	29%	34%	26%	29%	29%	28%	21%
I always have too much stuff to carry	25%	27%	26%	27%	23%	20%	25%
I live too far away for it to be practical	25%	26%	25%	28%	23%	23%	24%
Walking adds too much time to my journey	22%	25%	19%	24%	22%	22%	21%
None of these	19%	15%	20%	20%	16%	21%	24%
I can't be bothered/too much effort	15%	15%	12%	16%	23%	12%	14%
I have to think about transporting other people	15%	15%	12%	17%	19%	15%	14%
It's not enjoyable because of the hills	12%	17%	15%	3%	8%	9%	21%
I don't know how long walking will take	9%	11%	8%	9%	14%	5%	6%
The pavements/footpaths are not in good condition in my area	8%	13%	6%	7%	9%	6%	8%
Having to shower and/or change after walking is inconvenient	8%	11%	7%	5%	10%	5%	7%
I don't feel safe because of how people drive	7%	10%	6%	6%	7%	5%	3%
Some other reason (please specify)	4%	5%	4%	4%	5%	2%	4%
I don't feel safe because other footpath users pass me too closely	4%	5%	3%	4%	5%	3%	2%
I don't feel safe because of the speed of other footpath users	4%	5%	3%	3%	3%	3%	3%
I don't feel safe walking in the day	3%	3%	3%	3%	3%	3%	0%

■ Significantly higher than total
■ Significantly lower than total

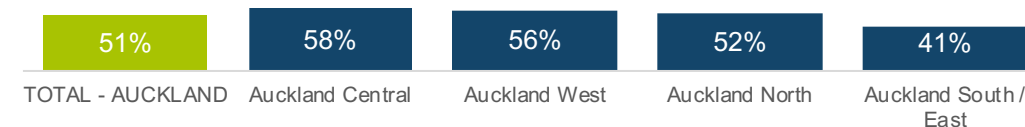


Auckland region in more detail...

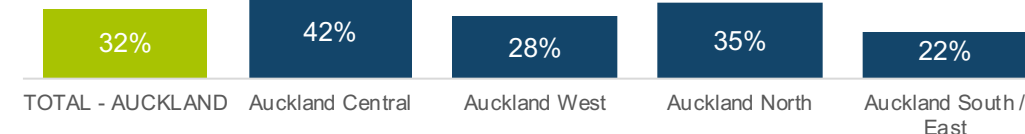
CYCLING BEHAVIOUR



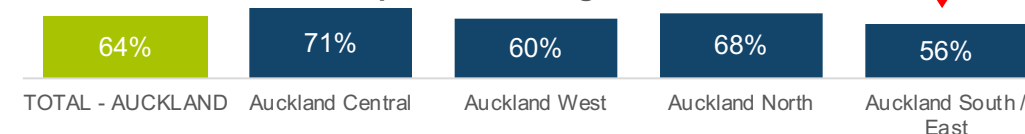
Overall state of cycling – NET Good



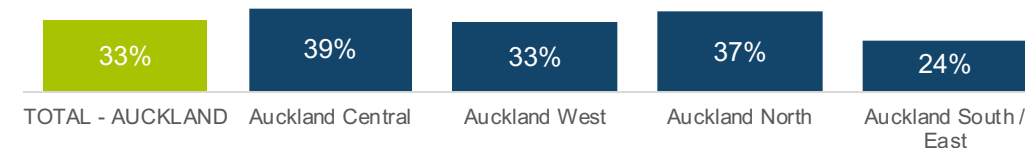
Overall safety perceptions – NET Safe [6-10]



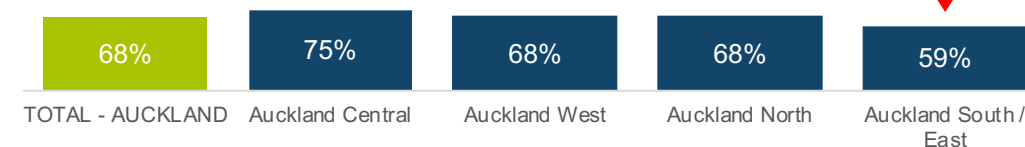
Investing in cycle lanes is important because it gives people more travel options – NET Agree



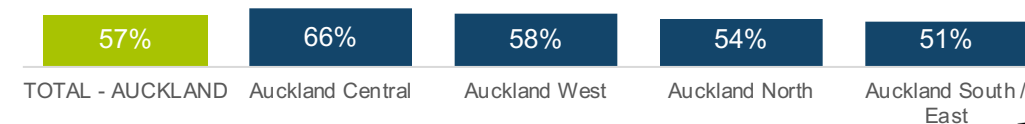
There are more cycle paths/lanes in my area – NET Agree



Support for cycling – NET Supportive [6-10]

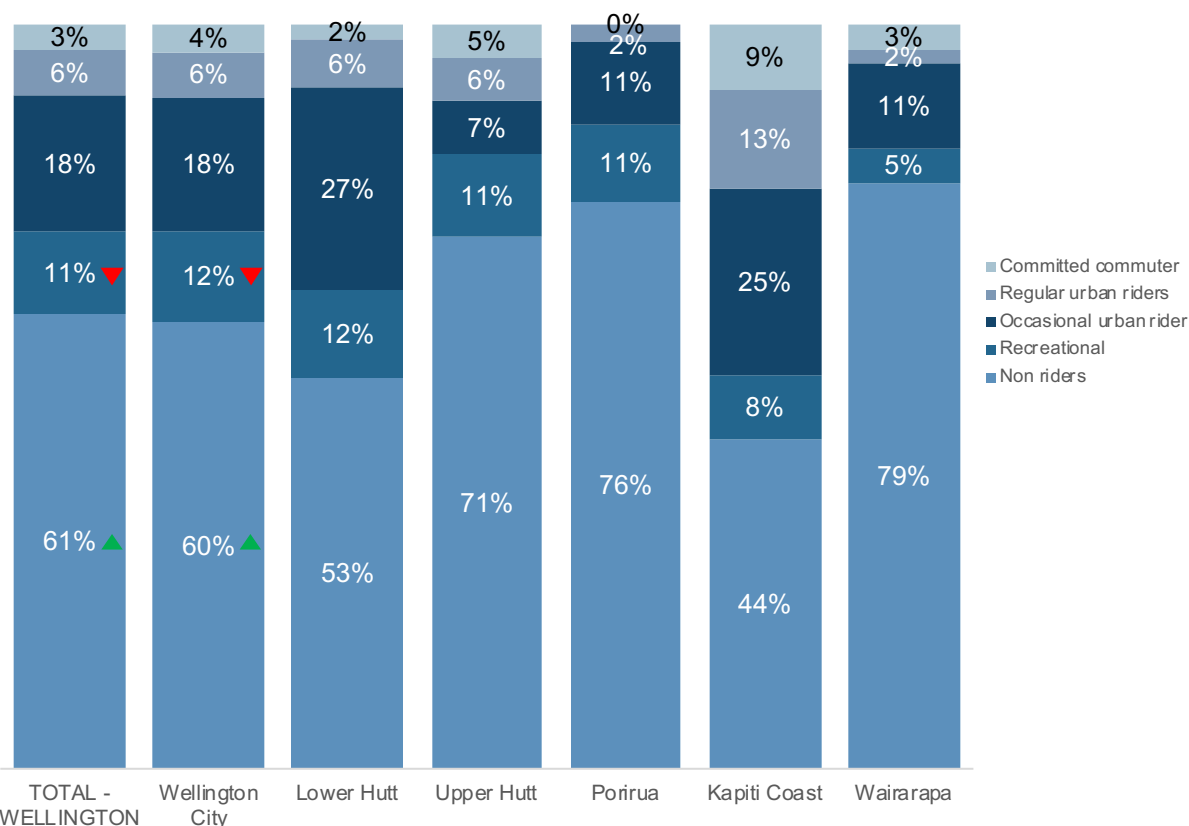


It is becoming more popular for people to use a bicycle to get to work, study or to the shops – NET Agree

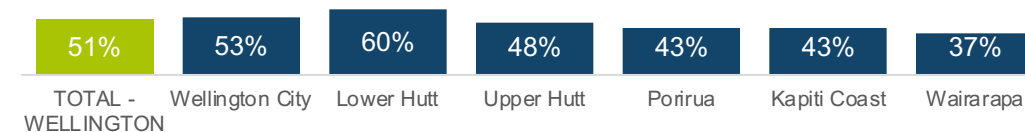


Wellington region in more detail...

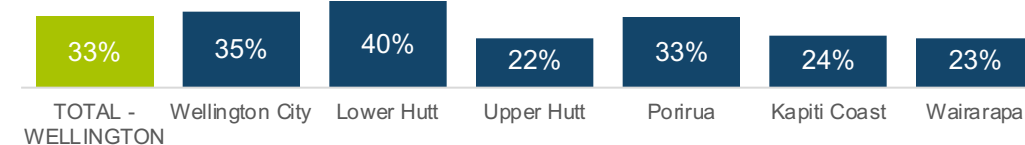
CYCLING BEHAVIOUR



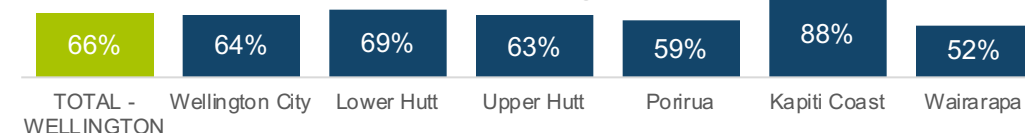
Overall state of cycling – NET Good



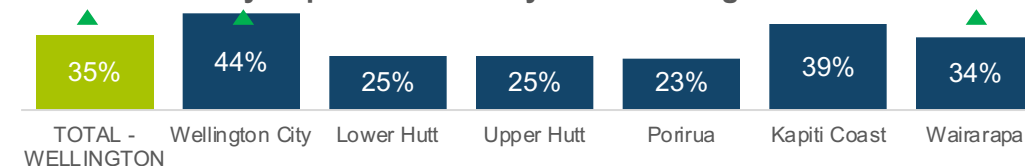
Overall safety perceptions – NET Safe [6-10]



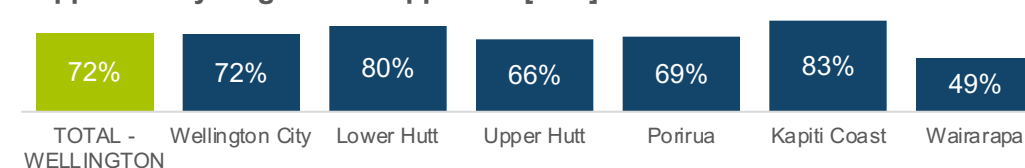
Investing in cycle lanes is important because it gives people more travel options – NET Agree



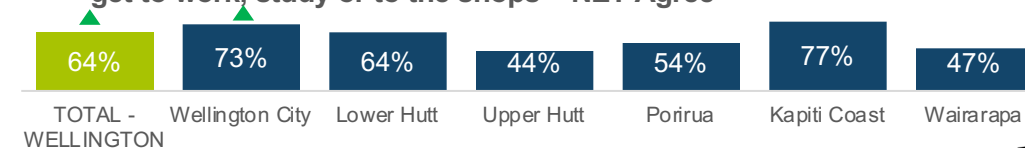
There are more cycle paths/lanes in my area – NET Agree



Support for cycling – NET Supportive [6-10]



It is becoming more popular for people to use a bicycle to get to work, study or to the shops – NET Agree



▲ Significantly higher than 2018
▼ Significantly lower than 2018



4%

PROFILE

Age: 18-34 years

Gender: Male

Region: Christchurch

HH Income: \$50k-\$100k

HH Structure: Single income
no kids

Self identification: Regular
commuter

PERCEPTIONS

Overall state of Cycling: Very good

Overall state of Walking: Very Good

Of Cyclists: Positive

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: Safe

Areas safe: Public roads, shared path or cycle path, quiet local roads, footpath, reduced speed zones

Areas unsafe: No skew

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

More safe

LEVEL OF CYCLING SUPPORT

In community: Very supportive

AGREE THAT

- I have lots of friends and family who cycle
- At work, lots of my colleagues cycle to work
- My family encourage and support that I cycle
- My friends admire and encourage me to cycle
- I believe that cycling improves my personal image to my peers
- Cycle ways/paths in area have encouraged you to cycle / cycle more

WALKING BEHAVIOURS

Walking the same as a year ago

GENERAL BEHAVIOURS

Regularly use bicycle, electric bike



8%

PROFILE

Age: 25-34 years

Gender: Male

Region: Auckland

HH Income: \$50k-\$100k

HH Structure: Single income no kids, Double income no kids

Self identification: Casual cyclist, Regular commuter, Faster commuter

PERCEPTIONS

Overall state of Cycling: Very good

Overall state of Walking: No skew

Of Cyclists: Positive

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: Safe

Areas safe: Public roads, shared path or cycle path, quiet local roads

Areas unsafe: No skew

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

No skew towards safe or unsafe

LEVEL OF CYCLING SUPPORT

In community: Very supportive

AGREE THAT

- I have lots of friends and family who cycle
- At work, lots of my colleagues cycle to work
- My family encourage and support that I cycle
- My friends admire and encourage me to cycle
- I believe that cycling improves my personal image to my peers
- Cycle ways/paths in area have encouraged you to cycle / cycle more

WALKING BEHAVIOURS

Walking the same as a year ago

GENERAL BEHAVIOURS

Regularly use bus, bicycle, electric bike

In the last week, travelled for:

- Public transport, recreation or fitness



18%

PROFILE

Age: 18-24 years, 35-44 years

Gender: No skew

Region: Christchurch,
Wellington, Auckland

HH Income: \$100k and over

HH Structure: Families

Self identification: Casual
cyclist

PERCEPTIONS

Overall state of Cycling: Good

Overall state of Walking: Good

Of Cyclists: Positive

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: No skew

Areas safe: Quiet local roads,
footpath, public roads with cycle
lanes separated from traffic, reduced
speed zone

Areas unsafe: No skew

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

More safe

LEVEL OF CYCLING SUPPORT

In community: Supportive

AGREE THAT

- I have lots of friends and family who cycle
- At work, lots of my colleagues cycle to work

WALKING BEHAVIOURS

Walking more often than a year ago

GENERAL BEHAVIOURS

Regularly walk, bicycle

In the last week, travelled for:

- Work, as part of job, recreation or
fitness

Consider it easy to:

- Get out and about outside
- Use the footpaths in your area

Recreational On Road Riders



8%

PROFILE

Age: 25-44 years

Gender: Female

Region: Wellington

HH Income: \$100k and over

HH Structure: No skew

Self identification: Leisure cyclist

PERCEPTIONS

Overall state of Cycling: No skew

Overall state of Walking: No skew

Of Cyclists: No skew

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: No skew

Areas safe: Shared path or cycle path, on quiet local roads, on the footpath

Areas unsafe: No skew

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

No skew towards safe or unsafe

LEVEL OF CYCLING SUPPORT

In community: Supportive

DISAGREE THAT

- My family encourage and support that I cycle
- My friends admire and encourage me to cycle

WALKING BEHAVIOURS

Walking the same as a year ago

GENERAL BEHAVIOURS

Regularly walk

Consider it easy to:

- Get out and about outside

Recreational Off Road Riders



3%

PROFILE

Age: 35-44 years

Gender: Female

Region: Wellington

HH Income: No skew

HH Structure: Double income no kids, Families

Self identification: Leisure cyclist

PERCEPTIONS

Overall state of Cycling: No skew

Overall state of Walking: No skew

Of Cyclists: No skew

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: Lean towards unsafe

Areas safe: No skew

Areas unsafe: Public roads with no cycle lanes, shared path or cycle path, quiet local roads, footpath

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

No skew towards safe or unsafe

LEVEL OF CYCLING SUPPORT

In community: Very unsupportive

If parking not impacted: Very unsupportive

DISAGREE THAT

- My family encourage and support that I cycle
- My friends admire and encourage me to cycle
- I believe that cycling improves my personal image to my peers

WALKING BEHAVIOURS

Walking the same as a year ago

Supportive Non Riders



36%

PROFILE

- Age:** 65 years and over
- Gender:** Female
- Region:** Auckland
- HH Income:** Less than \$50k
- HH Structure:** Older (no kids at home or living alone)
- Future cycling consideration:** Would consider

PERCEPTIONS

- Overall state of Cycling:** Good
- Overall state of Walking:** Very good
- Of Cyclists:** Slightly positive

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: No skew

Areas safe: Public roads with cycle lanes, quiet local roads

Areas unsafe: Public roads with no cycle lanes

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

No skew towards safe or unsafe

LEVEL OF CYCLING SUPPORT

In community: Supportive

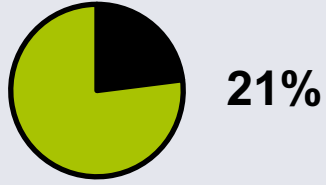
WALKING BEHAVIOURS

Walking less than a year ago

GENERAL BEHAVIOURS

- In the last week, travelled for:
- Doctor / dentist / pharmacy

Less Supportive Non Riders



21%

PROFILE

Age: 55 years and over

Gender: No skew

Region: Auckland

HH Income: Less than \$50k

HH Structure: Older (no kids at home or living alone)

Future cycling consideration:
Would not consider

PERCEPTIONS

Overall state of Cycling: Very poor

Overall state of Walking: Poor

Of Cyclists: Negative

DISAGREE THAT

- I have lots of friends and family who cycle
- At work, lots of my colleagues cycle to work

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: Unsafe

Areas safe: No skew

Areas unsafe: Public roads, shared path or cycle path, quiet local roads, footpath, park / domain, reduced speed zone

WALKING BEHAVIOURS

Walking less than a year ago

GENERAL BEHAVIOURS

Regularly use private vehicle

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

Less safe

LEVEL OF CYCLING SUPPORT

In community: Very unsupportive

Let's talk