



Understanding attitudes and perceptions of cycling & walking

WAKA KOTAHI



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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 six 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. While there is a high overall level of car use in our cities, public transport and active modes already play an important role in meeting some of the country's most critical transport tasks – especially at peak times. 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.

Revisiting the primary objectives of the research programme

1

Measure and monitor walking and cycling behaviour.

- Comparing results over time (2020 vs 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 traveling 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=2,256 New Zealanders

With a focus on key regions of:

- Auckland n=596
- Wellington n=543
- Christchurch n=502
- Hamilton n=209
- Tauranga n=204
- Dunedin n=202

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

- n=2,256 +/-2.1%
- n~500 is +/-4.4%
- n~200 is +/-6.9%

Fieldwork ran from May 28th 2020– June 30th 2020

Invitations were sent daily 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

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/ gender.

Changes to the survey

IMPACT COMPARISON OVER TIME

In 2020, there have been some improvements made to questions and question order. Changes include clarification of response options and rationalisation of questions to prevent people needing to answer similar questions. It is also important to note that 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 that the 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.

For ongoing measurement, all results will be able to be compared to 2020.

Summary: Key findings

Summary: Overall

CONTEXT

Fieldwork was conducted 28 May to 30 June, during Covid-19 Alert Levels 2 and 1.

Covid-19 has impacted how New Zealanders move around their cities

- During the fieldwork period, daily essential journeys have started to return to what they were during the initial Level 1 period. However, there are still some journeys which have remained much behind stated pre-lockdown rates.

*Active modes include use of walking, bicycle, e-bike, e-scooter

OVERALL TRAVEL BEHAVIOUR

Regular use

- Active modes* are used on a regular basis (at least once a week) by almost three quarters (71%) of urban New Zealanders.
- 68% are walking on a regular basis which has increased since 2019 (up from 60%).
- Regular use of bikes (including e-bikes) hasn't yet seen a shift and is stable at 13%.
- Whilst there have been positive shifts for walking, there has also been an increase in regular use of motorised vehicles (private motor vehicle, taxi/ride share, motorbike or scooter). 77% use motorised vehicles on a regular basis (up from 70% in 2019).

Trips

- Walking and cycling (including e-bike) make up 36% of all trips made in a given week. However, New Zealanders continue to be reliant on their cars, with private motor vehicles accounting for 49% of trips.

Summary: Walking



SUPPORT FOR WALKING

- Perceptions of walking and cycling as ways of getting around are positive. 73% of urban New Zealanders view walking as a great way to get around town easily and efficiently.

SAFETY AND INFRASTRUCTURE PERCEPTIONS

- For walking there are fewer perceived barriers than for cycling but there are more basic preconceptions to overcome; such as people don't have enough time to walk or they live too far from destinations for walking to be practical.
- Overall, perceptions of safety are strong with 86% viewing walking as safe in their region. However, safety perceptions drop when walking at night (52%) and around cyclists on shared paths (56%).
- Safety is more of a concern for Auckland walkers compared to other urban centres.

TRAVEL BEHAVIOUR

- Walking is an activity most people do with 76% of urban New Zealanders walking* in the last 12 months.
- 70% of New Zealanders are walking for commuter trips including to/from work or study or to get around town. 21% are committed commuters and are walking for these trips most days.
- The level of walking differs at a regional level; Auckland and Hamilton have the lowest levels of walking, while Wellington has the highest.
- For walking, the challenge is less about getting people to walk in general but enabling walking as an option to replace trips which would otherwise be taken by vehicle.

*walking 100m or crossing the road.

Summary: Cycling



SUPPORT FOR CYCLING

- Perceptions of walking and cycling as ways of getting around are positive. 60% of urban New Zealanders view cycling as a great way to get around town easily and efficiently.

SAFETY AND INFRASTRUCTURE PERCEPTIONS

- Safety continues to be a key barrier to cycling. Safety perceptions of cycling are at much lower levels than walking. Overall, 56% of urban New Zealanders feel that they are, or would be safe cycling.
- Since 2019, there has been an increase in safety overall - across quiet local roads, reduced speed zones, public roads (with or without painted cycle lanes) and on footpaths.
- Infrastructure helps to create a safe environment for both cyclists and non-cyclists. Safety perceptions increase when there is a greater separation between a vehicle and cyclist.
- Those who ride more frequently are more satisfied with the current cycling infrastructure, while recreational riders have lower satisfaction.

TRAVEL BEHAVIOUR

- One quarter of urban New Zealanders (24%) have cycled in the past year and 20% are riding for commuter trips. Overall cycling numbers remain stable.
- The level of cycling differs at a regional level; Auckland has the lowest level of current cyclists, while urban cycling shows strength through Hamilton, Tauranga and Christchurch.
- For cycling it is about encouraging people to take up cycling as a transportation mode as well as getting current riders to cycle more frequently, and for different types of trips.

*walking 100m or crossing the road.

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Growing walking and cycling



**The context for
walking and cycling**

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Summary: The context for walking and cycling

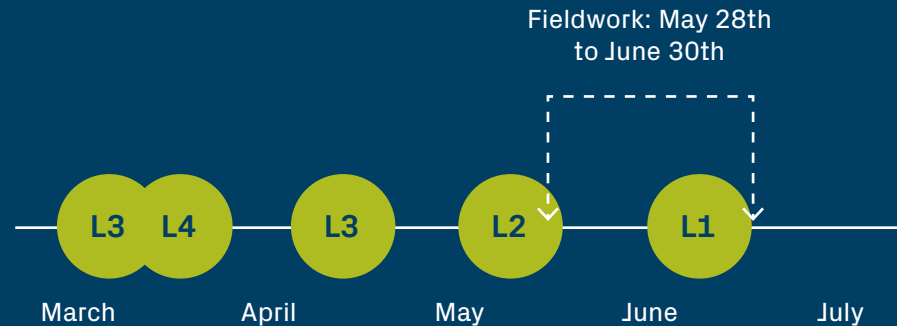
- Covid-19 has impacted how New Zealanders move around their cities.
- With the enforced nationwide restrictions for New Zealand, there has been a significant reduction in people travelling about their towns and regions. During the fieldwork dates when this research was conducted travel started to increase back to regular levels.
- Although travel behaviour started to increase during fieldwork, the number of journeys made is still behind pre-lockdown levels.
- Over time we will be able to monitor changes and identify whether any movements in metrics are an impact from Covid-19.



Covid-19 restrictions have created a unique experience of the urban landscape

We need to be conscious that this year focuses on results through Covid-19

COVID-19 LOCKDOWN TIMELINE



L4 – People instructed to stay at home in their bubble.

L3- People instructed to stay at home in their bubble other than for essential movement. Businesses can open premises but cannot physically interact with customers.

L2 – People can socialise in groups of up to 100, go shopping, or travel domestically.

L1 - No restrictions on domestic transport. No restrictions on workplaces or services.



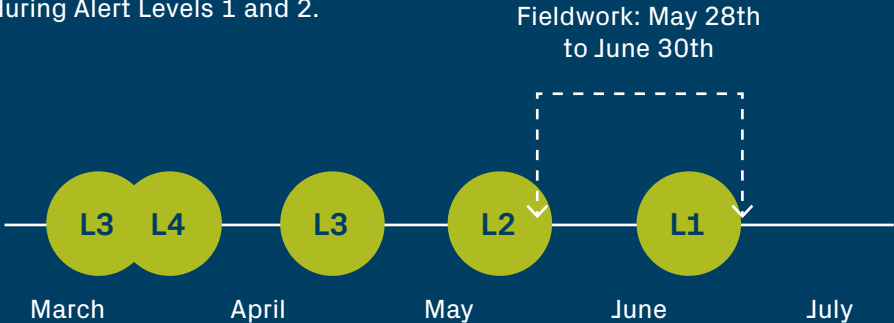
Covid-19 restrictions have had an impact on travel behaviour

Results from the Waka Kotahi Covid-19 Transport Impact Monitor indicate that during the fieldwork for this research there was rapid change in travel behaviour due to easing of restrictions:

- Concerns about Covid-19 dropped with just under half of New Zealanders concerned about the risk of Covid-19 infection to themselves or transmitting it to others. This was ~70% in peak Level 4.
- At the start of fieldwork, 10% of New Zealanders were moving around as they normally would - this increased to 38% by the end of fieldwork.

- As workers returned to the workplace, working from home decreased from 27% to 21% of those working.
- The proportion of New Zealanders travelling to work at least weekly increased from 41% to 51% during the fieldwork period.

- Use of active modes (walking and cycling) peaked during Covid-19 Alert Level 4, with 77% of respondents stating use during the past 7 days, over two thirds of New Zealanders continued to use active modes at least weekly during Alert Levels 1 and 2.



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Support for Active Modes

Summary: Support for Active Modes

- Perceptions of walking and cycling as ways of getting around are positive. 60% of urban New Zealanders view cycling as a great way to get around town easily and efficiently. This view is even higher for walkers at 73%.
- Overall, there is a high level of support towards cycling with almost three quarters of urban New Zealanders being supportive of cycling in their communities. This support is strong across the regions but is heightened in Tauranga and Hamilton.
- Beyond valuing cycling as a way of getting around, there is support for investment in cycling infrastructure. This investment is seen as important not only for more transport options, but for exercise purposes as well.



Most people view walking and cycling as easy and efficient ways to get around

PERCEPTIONS OF WALKING & CYCLING - % STRONGLY AGREE / AGREE

73%

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



60%

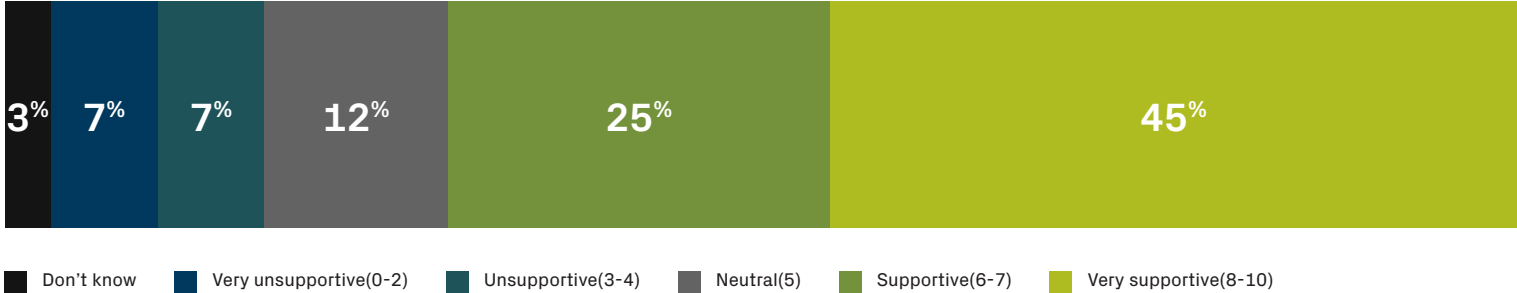
Cycling is a great way to get around town easily and efficiently

Q7 - Now please tell us how much you agree or disagree with the following statements (Strongly agree + agree)
Base: Total sample n=2,256

Public support for cycling is strong; almost three quarters are supportive of cycling in their community



SUPPORT OF CYCLING IN THE COMMUNITY



NET: SUPPORTIVE(6-10)

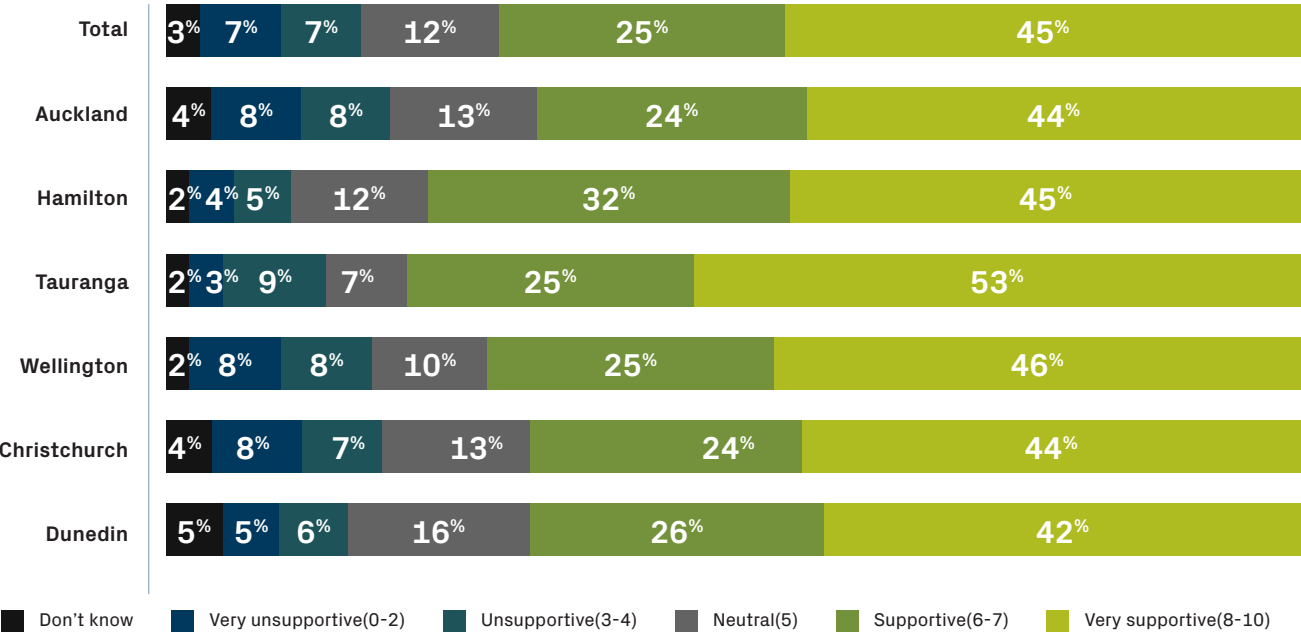
Year	2018	2019	2020
NET: SUPPORTIVE(6-10)	73%	71%	70%

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: Total n=2,256
 No change to question wording and response options. Question order changed



Support is strong across regions, which is heightened in Tauranga and Hamilton

SUPPORT OF CYCLING IN THE COMMUNITY



NET: SUPPORTIVE(6-10)

	2018	2019	2020
Total	73%	71%	70%
Auckland	69%	68%	68%
Hamilton	77%	70%	78%
Tauranga	77%	71%	78%
Wellington	74%	72%	71%
Christchurch	72%	73%	68%
Dunedin	73%	70%	68%

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: Total n=2,256, Auckland n=596, Hamilton n=209, Tauranga n=204, Wellington n=543, Christchurch n=502, Dunedin n=202
 No change to question wording and response options. Question order changed



Over half of New Zealanders think investing in cycling infrastructure is important

PERCEPTIONS OF CYCLING INFRASTRUCTURE - % STRONGLY AGREE / AGREE



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

There is support across the regions, this is highest in Hamilton

Q7 - Now please think about walking and cycling in general. How much do you agree or disagree with each of the following statements? Base: n=2,256

3

Overall travel behaviour

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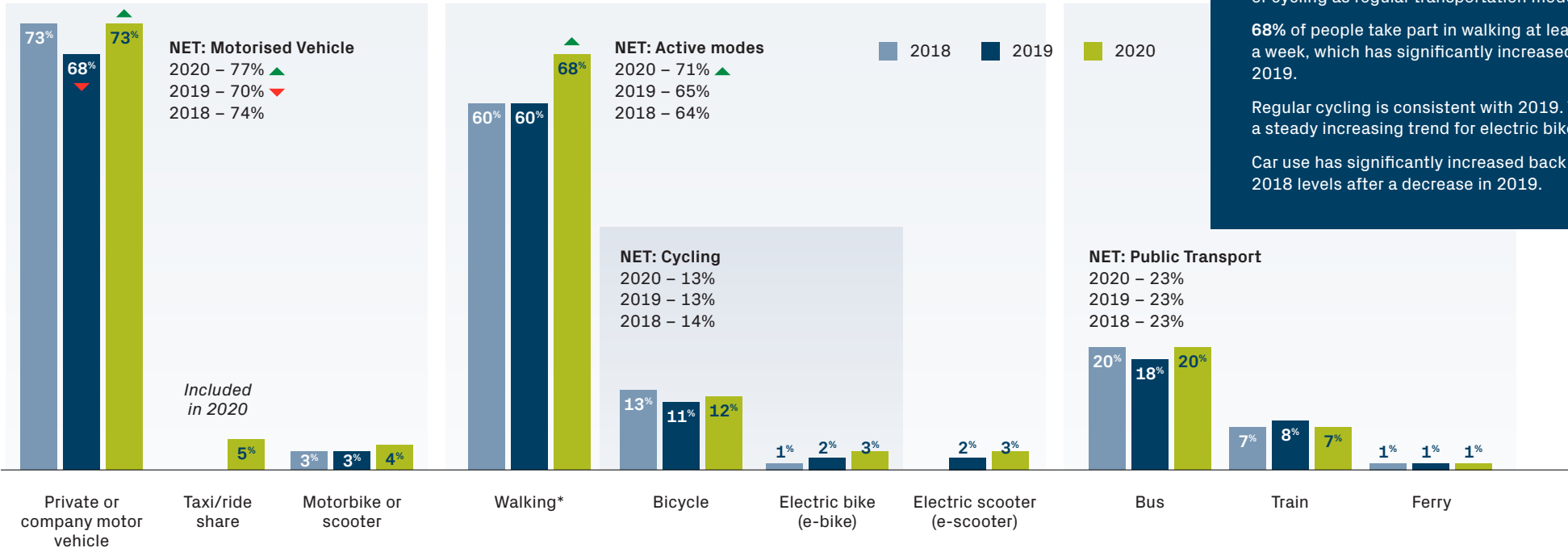
Summary: Overall travel behaviour

- Walking and cycling play a significant role in how New Zealanders move around their cities. 71% of urban New Zealanders use active modes on a regular basis (at least once a week) which has continued to increase since 2018.
- 68% of New Zealanders are walking at least once a week which has increased since 2019. However, regular motorised vehicle use has also increased.
- Regular bike (including e-bike) use remains stable at 13%.
- 36% of all trips in a given week are done by walking or cycling (including e-bike). Trip types made by walking and cycling are vast. Walking and cycling aren't only used for recreation but also key point-to-point journeys.



7 in 10 urban New Zealanders use an active mode of transport at least once a week

REGULAR MODES OF TRANSPORTATION - AT LEAST ONCE A WEEK



71% of urban New Zealanders are using walking or cycling as regular transportation modes.

68% of people take part in walking at least once a week, which has significantly increased since 2019.

Regular cycling is consistent with 2019. There is a steady increasing trend for electric bike use.

Car use has significantly increased back to 2018 levels after a decrease in 2019.

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.
 *walking 100m or crossing the road
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter) NET: Active Modes (Walking, Bicycle, Electric bike, Electric scooter) NET: Cycling (Bicycle, Electric bike) NET: Public Transport (Bus, Train, Ferry)
 Change in question response options. No change in 'at least once a week' response options, ability to compare.

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

Transportation choices differ by region; active modes are less established in Auckland and Hamilton

REGULAR MODES OF TRANSPORTATION - AT LEAST ONCE A WEEK

	Total	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
NET: Motorised vehicle	77%	73%	81%	81%	74%	82% ▲	75%
Walking*	68%	62% ▼	61% ▼	72%	71%	71%	71%
NET: Cycling	13%	11%	11%	20% ▲	9% ▼	21% ▲	5% ▼
NET: Public transport	23%	29% ▲	14% ▼	14% ▼	37% ▲	15% ▼	16% ▲

Auckland and Hamilton have lower levels of regular walking.

Tauranga and Christchurch have the highest levels of regular cycling.

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.

*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

71% of people surveyed walk or cycle at least once a week

REGULAR MODES OF TRANSPORTATION - AT LEAST ONCE A WEEK

	Gender			Age			Ethnicity			
	Total	Male	Female	18-34	35-54	55+	Pakeha/NZ European	Māori	Pasifika	Asian
NET: Motorised vehicle	77%	77%	76%	67%	79%	85% ▲	80% ▲	65% ▼	67%	73%
Walking*	68%	67%	69%	67%	68%	69%	72% ▲	58% ▼	47% ▼	61% ▼
NET: Cycling	13%	18% ▲	8% ▼	17% ▲	14%	10% ▼	14%	9%	11%	12% ▼
NET: Public transport	23%	26%	20%	33% ▲	24%	13% ▼	20% ▼	28%	36% ▲	33% ▲

Females, 55+ and those of asian ethnicity are less likely to cycle on a weekly basis.

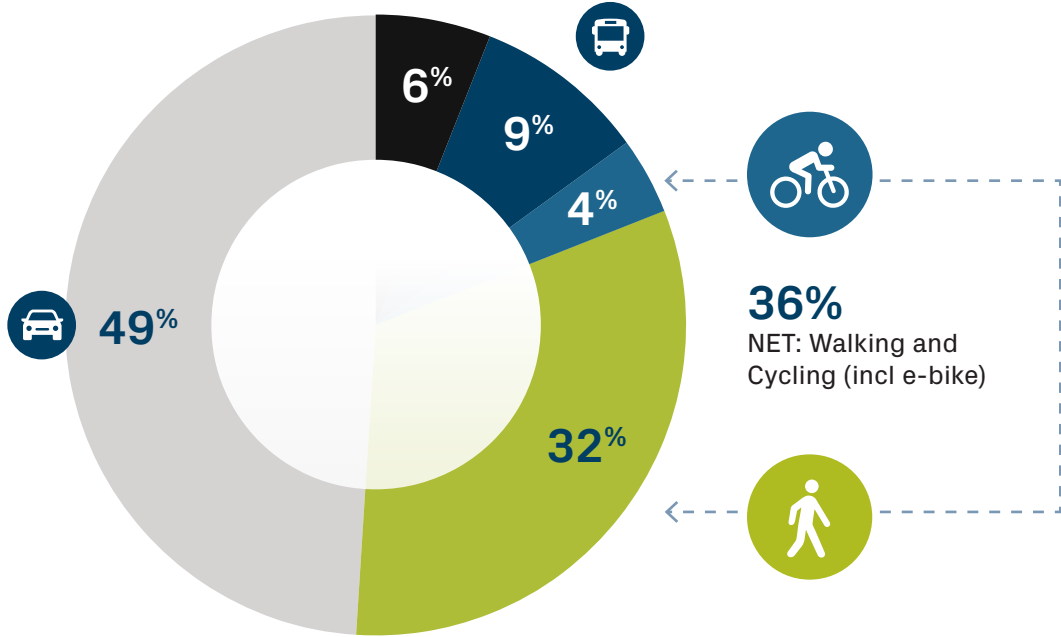
Māori, Pasifika and Asian are less likely to engage in regular use of walking.

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.
 *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

Walking and cycling account for over a third of trips made over the course of a week

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



- Motorised vehicle (private motor vehicle, taxi/ride share, motorbike or scooter)
- Walking
- Cycling (bicycle or e-bike)
- NET: Public transport (bus, train, ferry)
- NET: Other (e-scooter, wheelchair, other)

Base: Total sample, 2018 n=2,115, 2019 n=2,174, 2020 n=2,256.
*Walking 100m or crossing the road
Changes to question structure and wording






36% of all recent trips measured were made by either walking or cycling.

Across all recent trips, walking accounts for almost 1/3 of all trips. Cycling only accounts for a small number of trips.

New Zealanders continue to be reliant on their cars, with private motor vehicles accounting for 49% of trips.

Different transportation options are used for different types of trips

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

	TOTAL					
To / from shops	22%	22%	13% ▼	23%	13% ▼	14% ▼
To / from work	19%	20%	18%	17% ▼	26% ▲	28% ▲
To / from visiting friends or family	17%	18%	13%	17%	14%	20%
To / from somewhere else	9%	6% ▼	7%	11%	5% ▼	11%
To / from a place of recreation	8%	7%	15% ▲	9%	6%	5% ▼
As a part of my job	8%	10%	3% ▼	6%	6%	4% ▼
To / from doctor/dentist/pharmacy	7%	5%	20% ▲	7%	12%	6%
Take children to school/day care	6%	8%	3% ▼	6%	11%	4%
To / from school, college, university	4%	3%	7%	5%	6%	6%

- The types of trips that people walk for are:**
- to get to/from shops
 - to work
 - visit friends and family
- The types of trips people cycle for are:**
- to get to appointments (doctor, dentist etc.)
 - to work
 - to recreation

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

▲ Significantly higher than total ▼ Significantly lower than total

4

A closer look at walking

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Summary: A closer look at walking

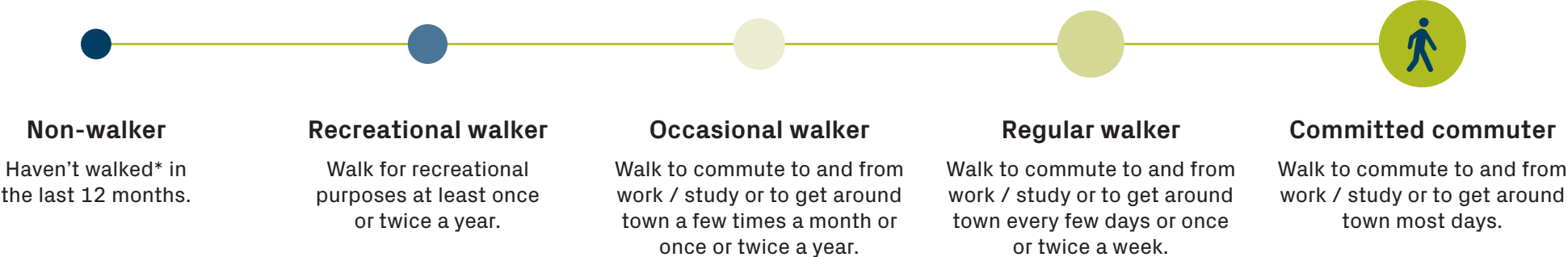
- Walking is something most people do, with 76% of urban New Zealanders walking* in the last 12 months.
- There has been an increase in total walking, which sees more people walking than in 2019. This may be a result of Covid-19.
- The level of walking differs at a regional level; Auckland and Hamilton have the lowest levels of urban walking, while Wellington shows strength with the highest proportion of walking.

*walking 100m or crossing the road



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

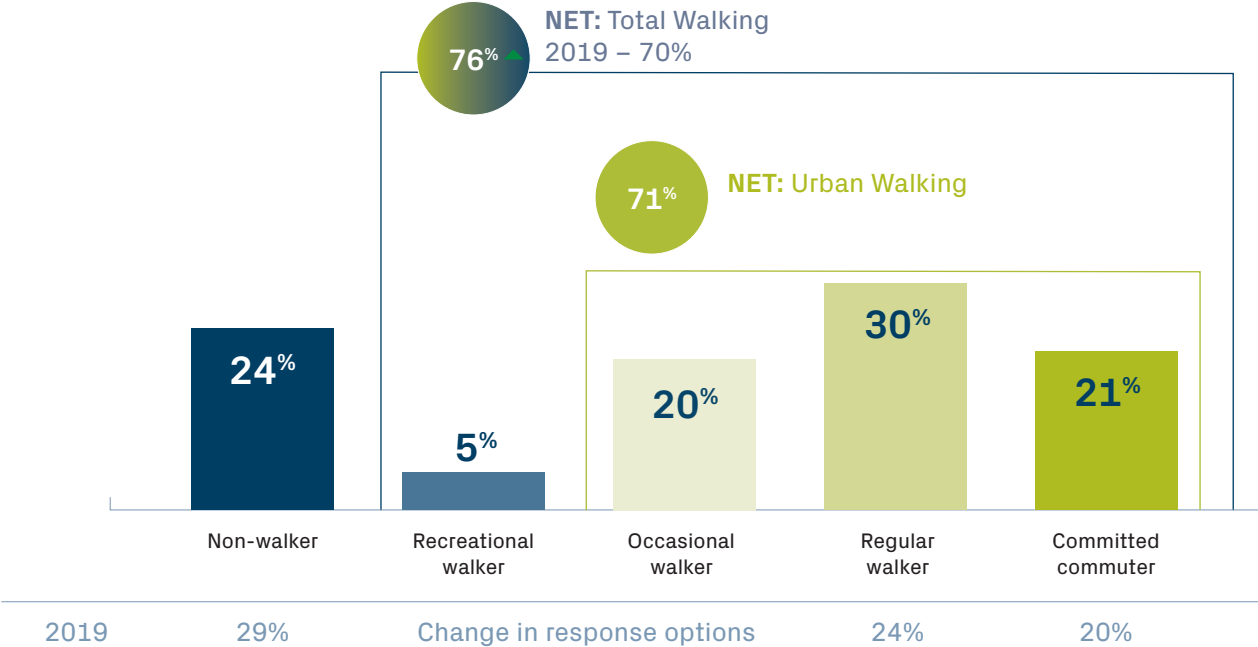


*walk for at least 100m and/or cross the road

Walking is something most New Zealanders engage with



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



71% of urban New Zealanders choose to walk as a way of getting around.

Total walking has increased since 2019.

For walking, the challenge is less about getting people to walk in general but enabling walking as an option to replace trips which would otherwise be taken by vehicle.

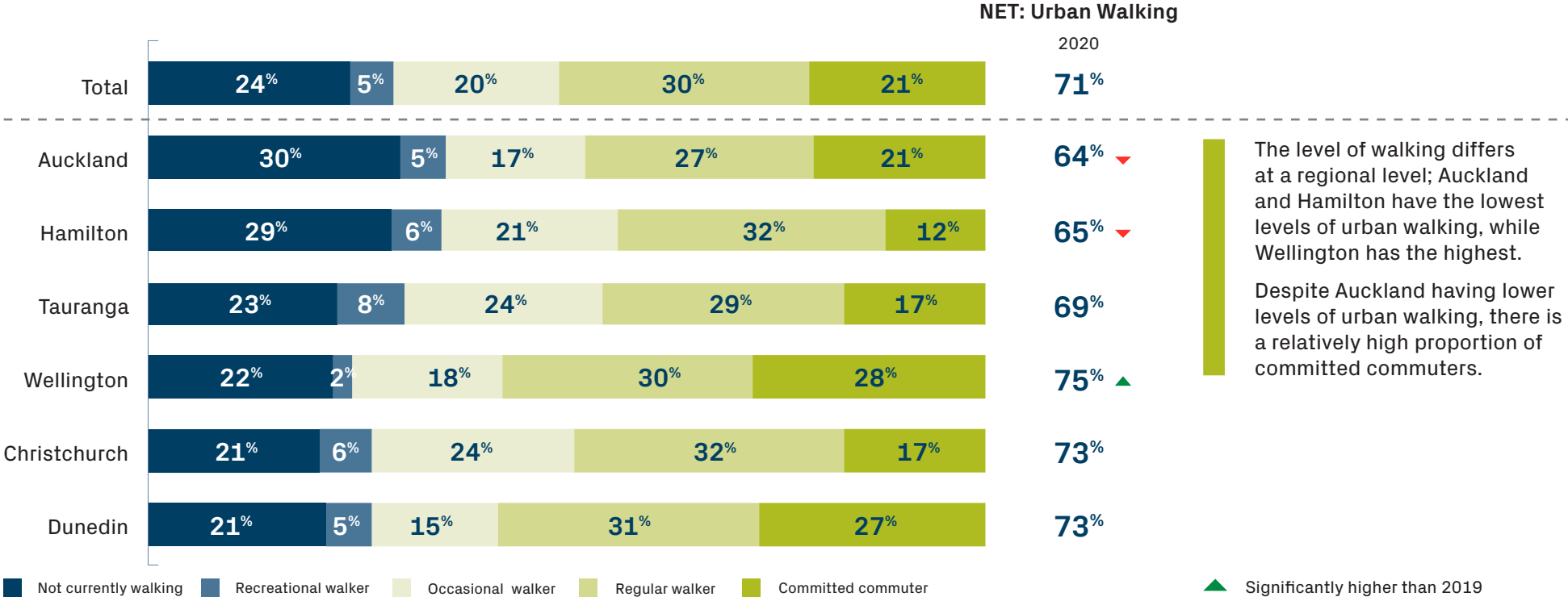
Q23a. Which of the following have you used in the past 12 months?
 W2. How often do you travel by foot... To commute to and from work/study, To get around town – to run errands, to go to shops, visit family, friends etc, For recreational purposes.
 Base: Total sample, 2020 n=2,256
 *Walk for at least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

▲ Significantly higher than 2019
 ▼ Significantly lower than 2019

Wellington, Christchurch and Dunedin have the highest levels of walking



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



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 n=2,256, Auckland n=591, Hamilton n=207, Tauranga n=201, Wellington n=542, Christchurch n=499, Dunedin n=201

The profile of walkers differs across the segmentation framework

	Total	Not currently walking	Recreational walker	Occasional walker	Regular walker	Committed commuter
18-34	33%	33%	17% ▼	29%	35%	39% ▲
35-54	34%	34%	26%	37%	33%	34%
55+	33%	33%	57% ▲	34%	33%	27% ▼
Male	49%	54% ▲	47%	50%	45%	46%
Female	51%	46% ▼	53%	50%	55%	54%
Pakeha/NZ Euro	68%	58% ▼	78% ▲	73% ▲	72% ▲	67%
Māori	8%	12% ▲	3% ▼	7%	9%	6%
Pacific	4%	6%	2%	2%	3%	3%
Asian	16%	20% ▲	9% ▼	15%	13%	16%
Less than \$50k	28%	31%	29%	22% ▼	30%	27%
\$50k-\$99k	30%	27%	33%	30%	30%	29%
\$100k or more	27%	21% ▼	19%	36% ▲	26%	28%

Recreational walkers are more likely to be older, while committed commuters are more likely to be younger.

Who isn't walking?

24% have not walked in the past year.

Those not currently walking are more likely to be:

- Male
- Māori ethnicity
- Asian ethnicity

▲ Significantly higher than total ▼ Significantly lower than total

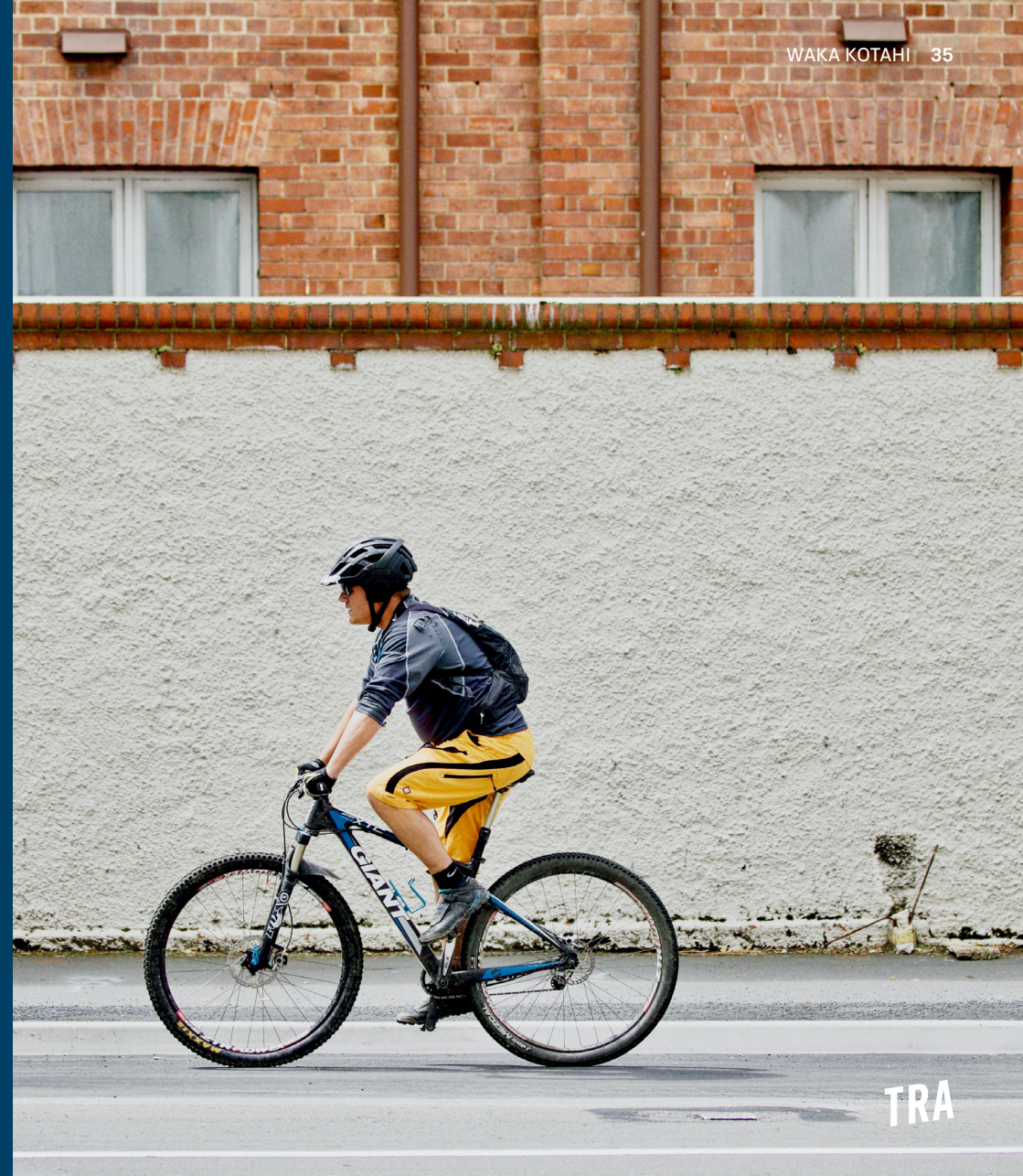
Q23a. Which of the following have you used in the past 12 months?
 W2. How often do you travel by foot... To commute to and from work/study, To get around town – to run errands, to go to shops, visit family, friends etc, For recreational purposes.
 * Walk for at least 100m and/or cross the road Base: Total n=2,256 Not currently walking n=542, Recreational walker n=119, Occasional urban walker n=446, Regular urban walker n=674, Committed commuter n=471

5

A closer look at cycling

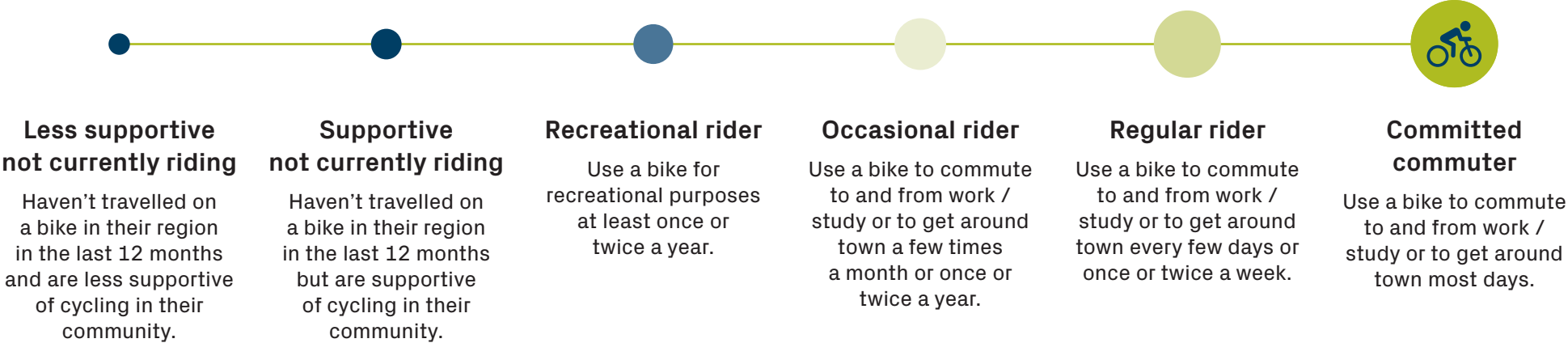
Summary: A closer look at cycling

- One quarter of urban New Zealanders have cycled in the past year and 20% are riding at least occasionally. Overall, there has not been a significant change in the number of people cycling since 2019.
- The majority of those who are not currently riding are supportive of cycling in their communities, however, there is still one quarter of New Zealanders who are less supportive.
- The level of cycling differs at a regional level; Auckland has the lowest level of current cyclists, while urban cycling shows strength through Hamilton, Tauranga and Christchurch.



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

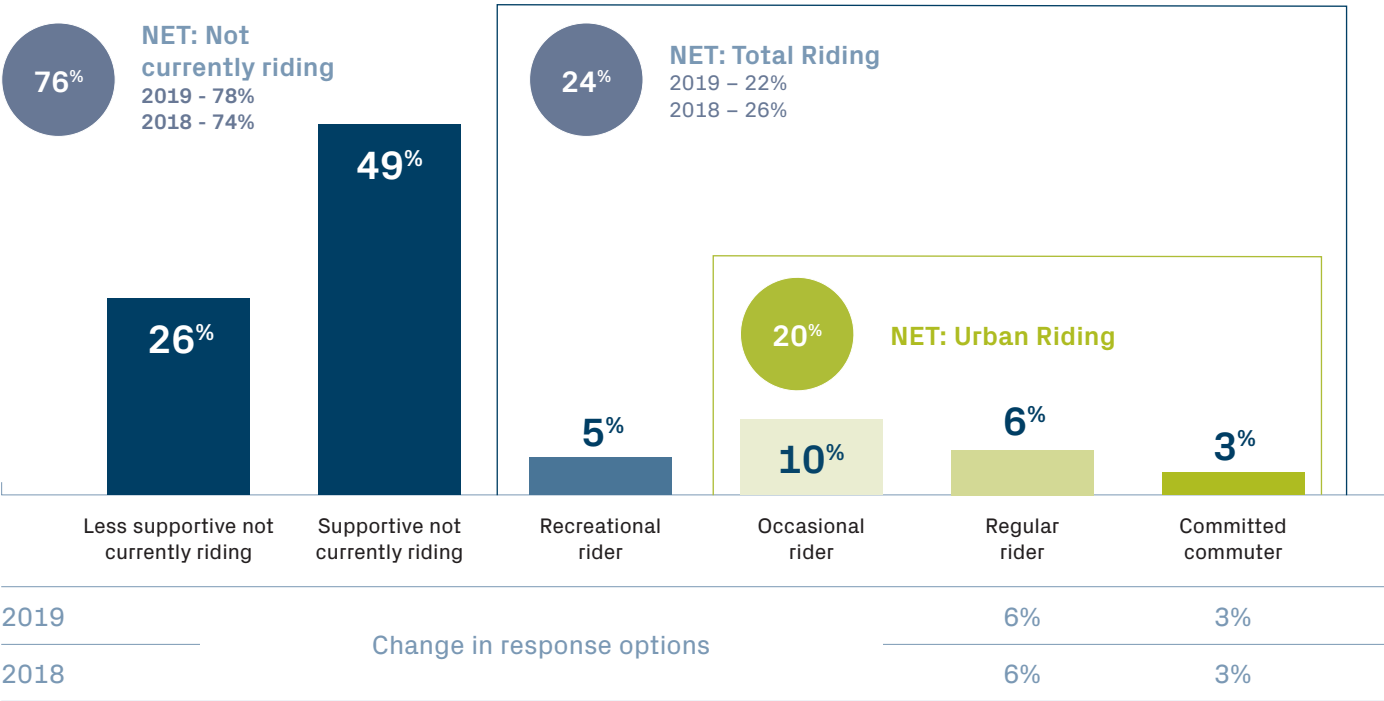
THIS IDENTIFIES CYCLISTS BASED ON HOW FREQUENTLY THEY TRAVEL BY BIKE FOR CERTAIN TRIPS





One quarter of urban New Zealanders have engaged with cycling in the past year and one in five are urban riders

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



Compared to 2019, 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.

Majority of those who are not currently riding are supportive, however, there are still one quarter of New Zealanders who are less supportive.

Those less supportive are more likely to be aged 55 and over.

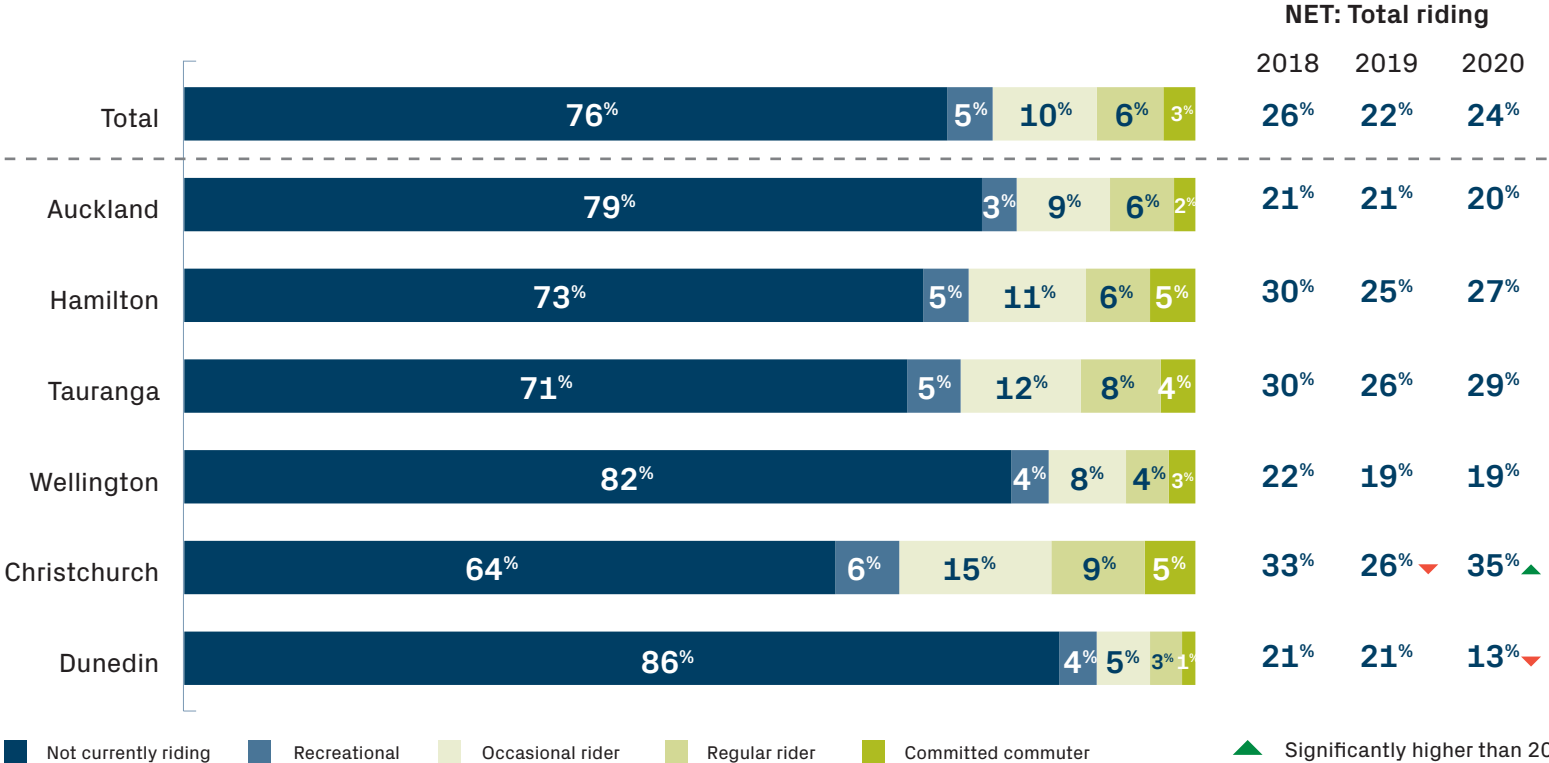
Q23a. Which of the following have you used in [REGION] in the past 12 months? Q6. How often do you currently ride a bicycle or e-bike?
 Base: Total sample: n=2,256
 Changes made to response options which impact ability to compare not currently riding, recreational riders and occasional riders

▲ Significantly higher than 2019 ▼ Significantly lower than 2019

Across urban regions, Christchurch has the highest levels of cycling participation



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



Across the regions, Christchurch shows strength in cycling, with the highest levels of participation. This region has also seen a significant increase in 2020, regaining high levels recorded in 2018.

Wellington and Dunedin have consistently had the lowest levels of participation over the past three years.

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: Total n=2,256, Auckland n=596, Hamilton n=209, Tauranga n=204, Wellington n=543, Christchurch n=502, Dunedin n=202

The profile of riders differs across the cycling framework



	Total	Not currently riding	Recreational rider	Occasional rider	Regular rider	Committed commuter
18-34	33%	31%	26%	35%	52% ▲	47% ▲
35-54	34%	32%	45% ▲	39%	35%	32%
55+	33%	37% ▲	29%	26% ▼	12% ▼	21% ▼
Male	49%	45% ▼	51%	51%	70% ▲	74% ▲
Female	51%	55% ▲	49%	49%	30% ▼	26% ▼
Pakeha/NZ Euro	68%	67%	71%	74%	63%	75%
Maori	8%	9%	4%	7%	7%	8%
Pacific	4%	4%	2%	3%	4%	3%
Asian	16%	16%	12%	13%	21%	13%
Less than \$50k	28%	31% ▲	14% ▼	17% ▼	21%	22%
\$50k-\$99k	30%	28%	38%	31%	40% ▲	34%
\$100k or more	27%	24% ▼	38% ▲	37% ▲	33%	33%

Those who are more likely to cycle are:

- Younger (18-34)
- Male

There is a core group of New Zealanders that don't cycle. They are more likely to be:

- Older (55+)
- Female
- Lower income

This group have lower safety perceptions of cycling in their community. This will be explored more in the next section.

▲ 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: Total n=2,256, Not currently riding n=1,726, Recreational riders n=99, Occasional riders n=232, Regular riders n=140, Committed commuters n=70

6

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

Summary: Walking

- For walking there are fewer perceived barriers than for cycling. However, there are more basic preconceptions to overcome that people don't have enough time to walk or that they live too far from destinations for walking to be practical.
- Overall, perceptions of safety are strong with 86% viewing walking as safe in their region. However, there are some concerns around walking at night and with cyclists on shared paths. Safety is more of a concern for Auckland walkers compared to other urban centres.
- Amongst pedestrians, there is low perception of positive shared path behaviours which help to create a sense of safety. This low perception is not particular to one area but rather seen across the regions.



Summary: Cycling

- In recent years, there has been continual development and improvements made to cycling infrastructure across New Zealand. Since 2019 there has been an increase in safety perceptions overall and in certain environments.
- However, safety continues to be a key barrier to cycling. Safety perceptions of cycling are at much lower levels than walking. Overall, 56% of urban New Zealanders feel that they are, or would be safe cycling.
- Infrastructure helps to create a safe environment for both cyclists and non-cyclists. Safety perceptions increase when there is a greater separation between a vehicle and cyclist.
- Those who ride more frequently are more satisfied with the current cycling infrastructure, while recreational riders have lower satisfaction. The continuity and connectivity of cycle lanes and paths should be a focus area for improvement.



Compared to walking, perceptions of safety for cycling are at much lower levels

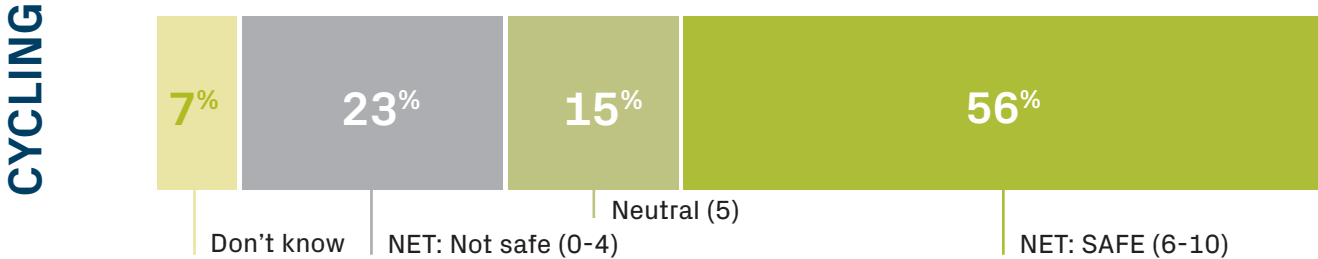
PERCEPTIONS OF SAFETY – % OF PEOPLE WHO FEEL SAFE WALKING / CYCLING (6-10)



86% view walking as safe in their region. This drops down to 56% for cycling.

For both walking and cycling, those who are less likely to feel safe are more likely to be:

- Female
- 55+

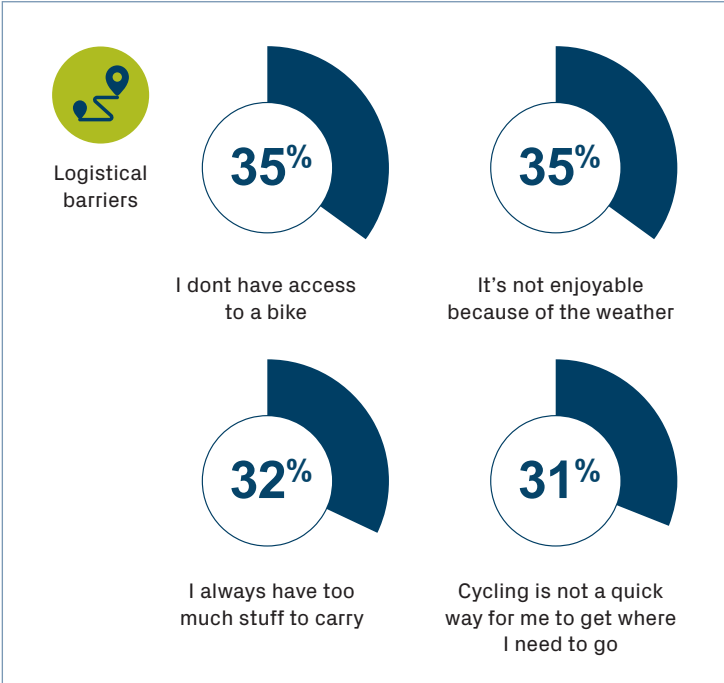
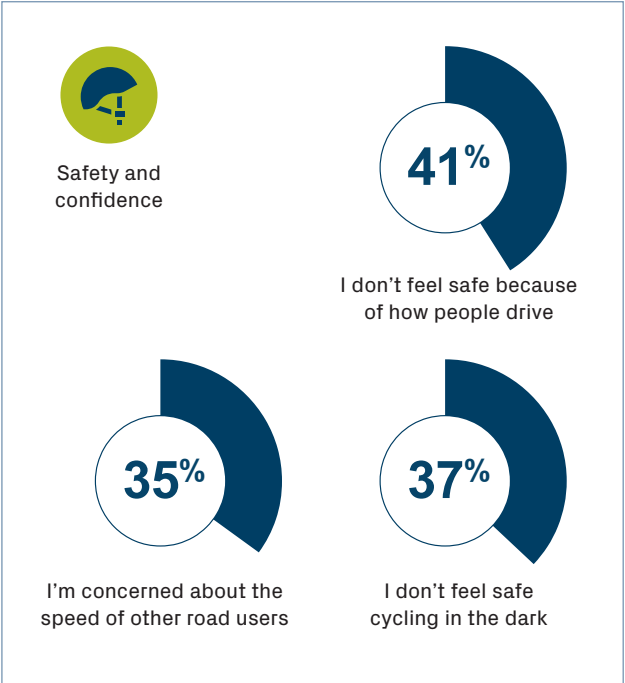


Q7A - In general, how safe are you/would you be walking in the [REGION] area? Base: Physically able to walk n=1,949
A5 - In general, how safe are you/would you be, riding a bicycle in [REGION]? Base: Physically able to cycle n=1,962.



Concerns around safety hold people back from cycling

BARRIERS TO CYCLING



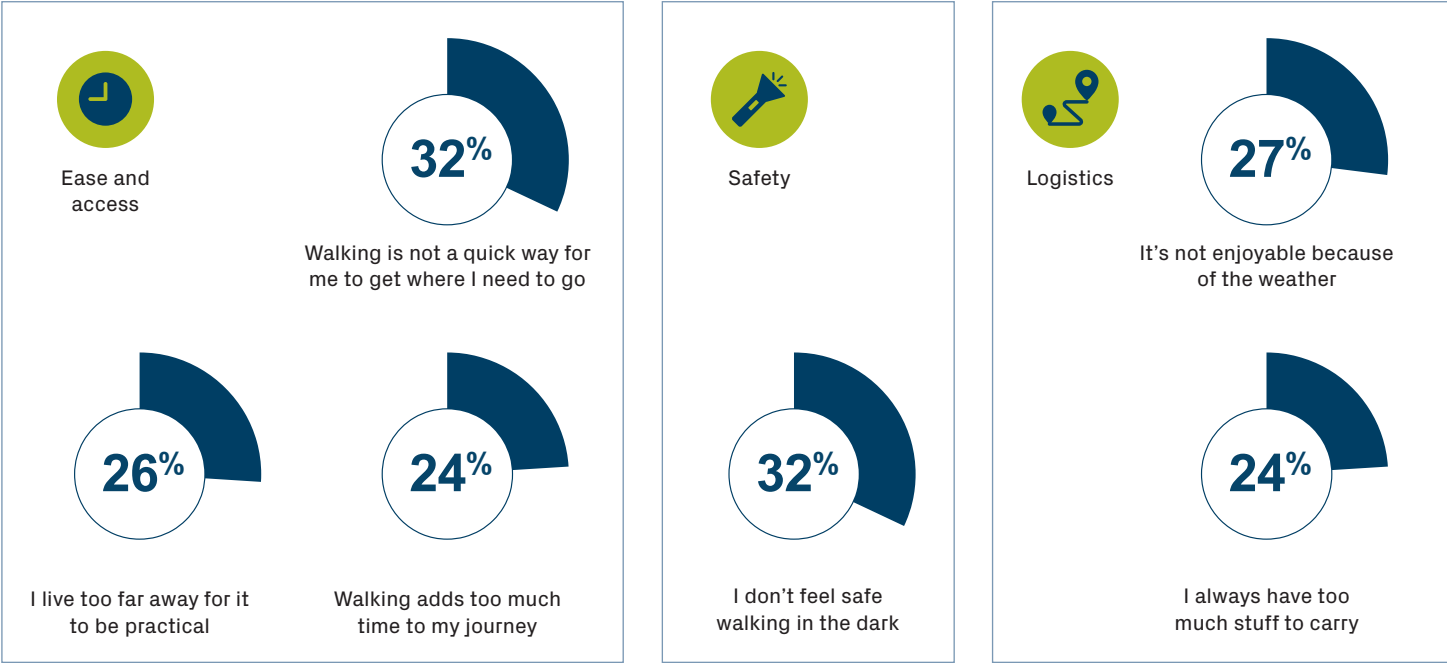
Safety is a key perceived barrier to cycling more often, expressed by both cyclists and non-cyclists. This is a consistent picture across New Zealand. There are, however, regional differences in relation to the weather and geographical landscapes being mentioned. This is consistent with 2019.

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 n=1,962. No change to question wording and response options. Question order changed



Safety is a barrier to walking more, but there are also more practical barriers to overcome

BARRIERS TO WALKING

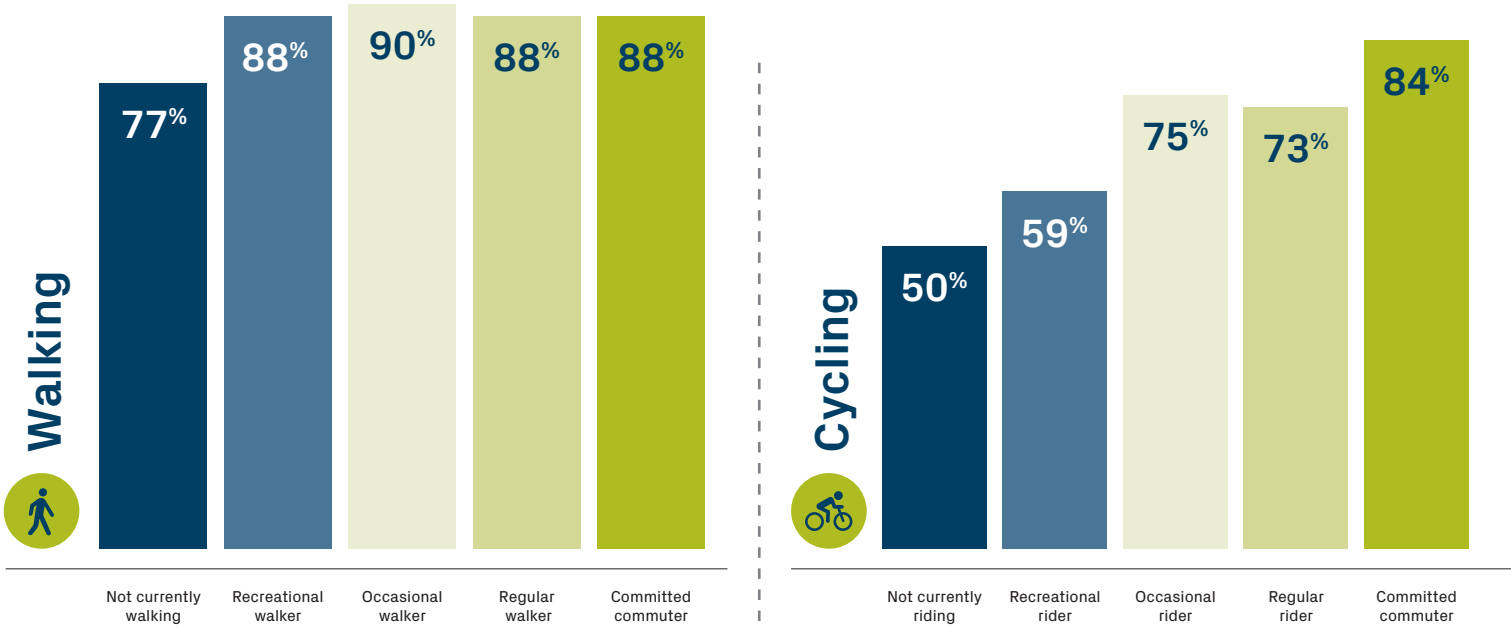


Perceived travel time and safety in the dark prevent people walking more often. This is a consistent picture to 2019.

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 n=1,949. No change to question wording and response options. Question order changed

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)



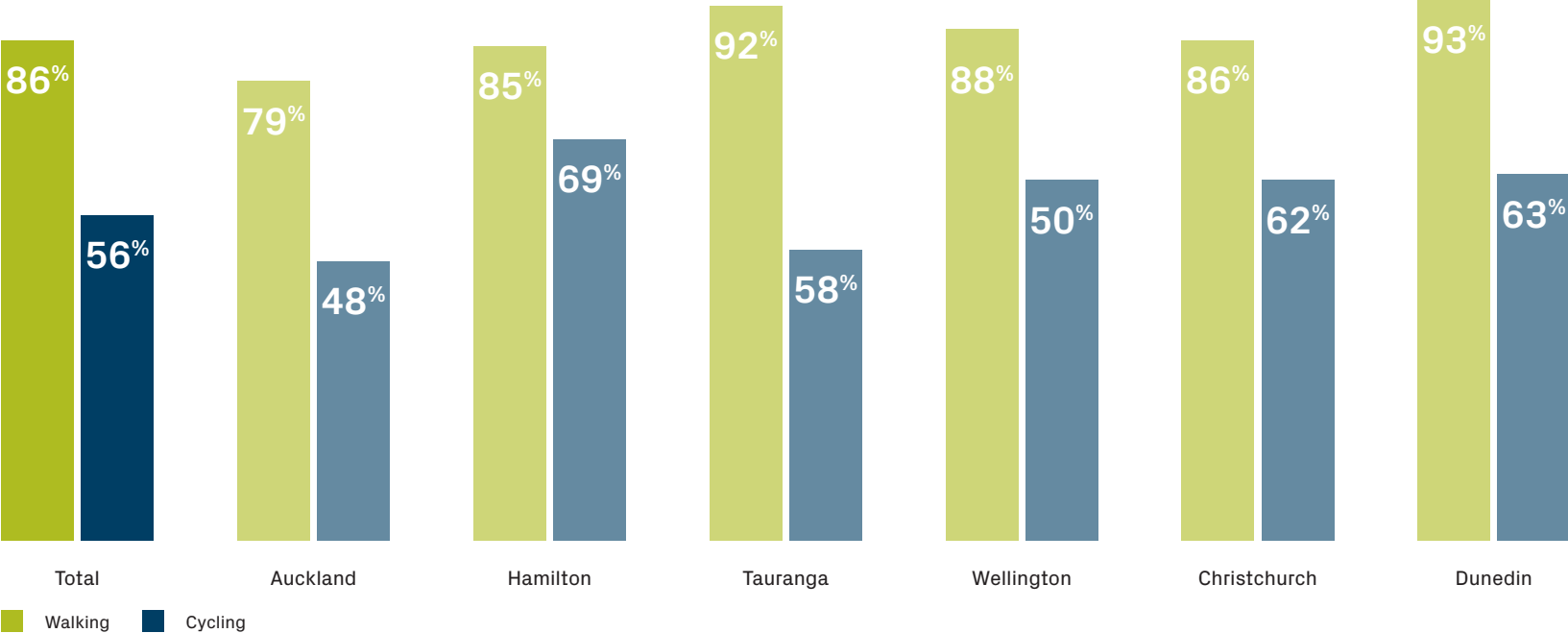
Those who walk generally feel safe regardless of frequency, but this does drop for those not currently walking.

For those who ride, committed commuters feel safe but safety perceptions decrease as frequency of cycling decreases.

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 Total n=1,949
A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10]
Physically able to cycle Total n=1,962.

Across the regions, Auckland has lower levels of cycling and walking safety perceptions

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

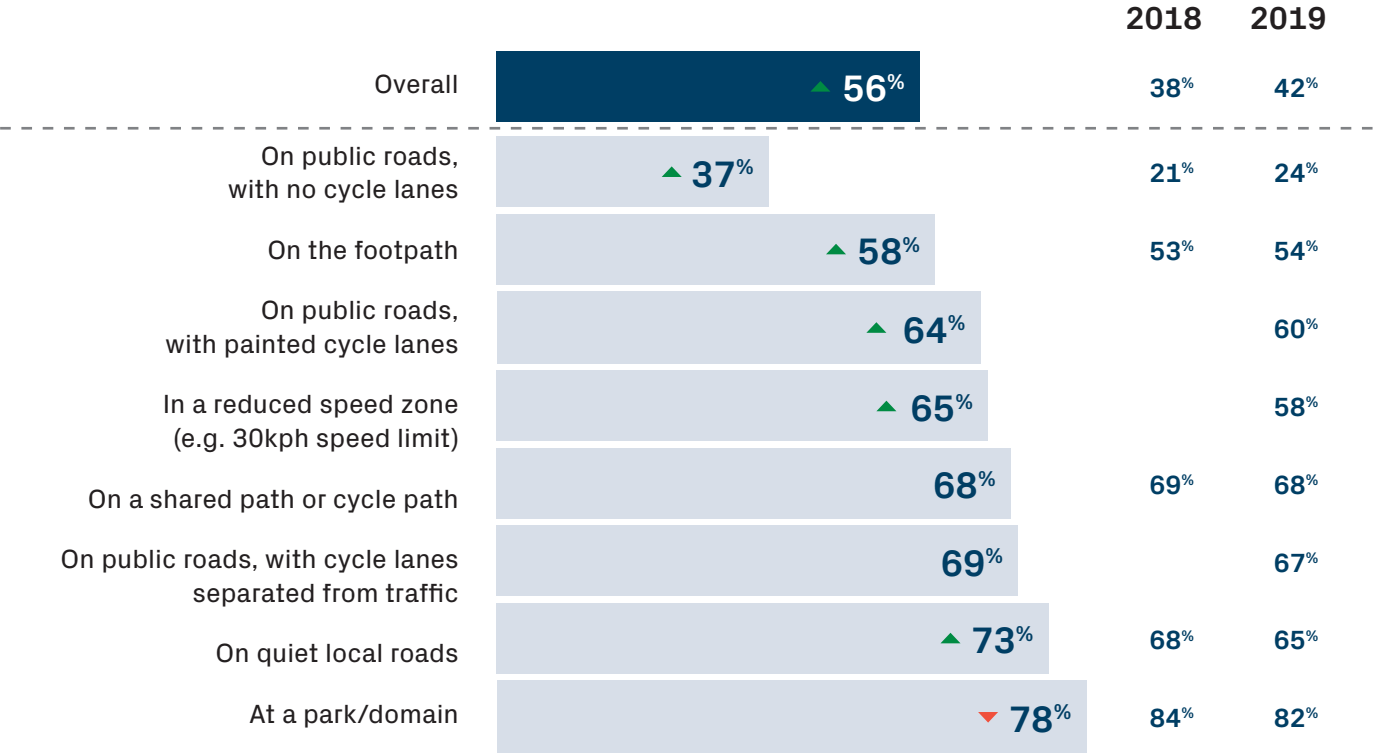


Q7A - In general, how safe are you/would you be walking in the [REGION] area? [NET Safe - 6-10 out of 10]
Base: Physically able to walk Total n=1,949, Auckland n=516, Hamilton n=174, Tauranga n=172, Wellington n=475, Christchurch n=429, Dunedin n=172
A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10]
Physically able to cycle Total n=1,962, Auckland n=522, Hamilton n=177, Tauranga n=174, Wellington n=482, Christchurch n=425, Dunedin n=171



Where infrastructure is laid there is a greater sense of safety

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



There has been an increase in safety across quiet local roads, reduced speed zones, public roads (with or without painted cycle lanes), and on footpaths.

Parks and domains are perceived to be the safest, although this perception has decreased compared to 2019.

Even the most basic cycling infrastructure helps people feel a lot safer.

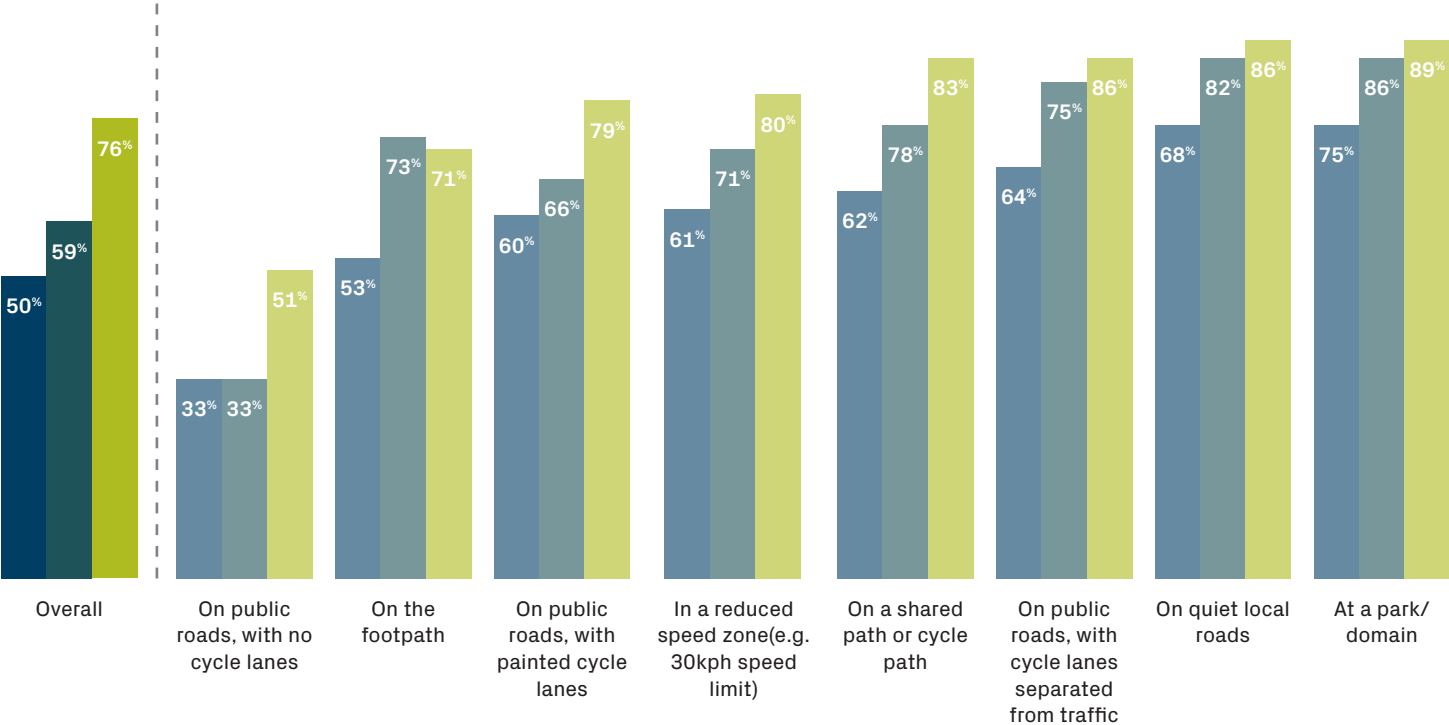
Only 56% feel safe overall, however, if cycling on a shared path or road with cycle lanes, safety perceptions increase significantly.

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=1962
 No change to question wording and response options. Question order changed

▲ Significantly higher than 2019 ▼ Significantly lower than 2019

Infrastructure creates a sense of safety for those who aren't currently riding

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



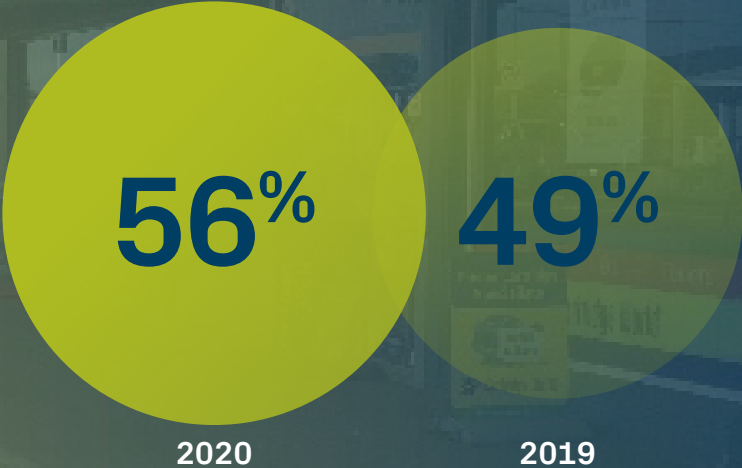
For both cyclists and non-cyclists, perceptions of safety increase significantly when a road has dedicated cycle lanes. The greater the separation between vehicle and cyclist, the greater the sense of safety.

- Not currently riding
- Recreational rider
- Urban rider (Occasional, Regular, Committed commuter)

A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10]
 Physically able to cycle Total n=1,962, Not currently riding n=1,469 Recreational rider n=93 Urban rider (Occasional rider, Regular rider, committed commuter) n=400



The development of infrastructure plays a key role in encouraging cycling

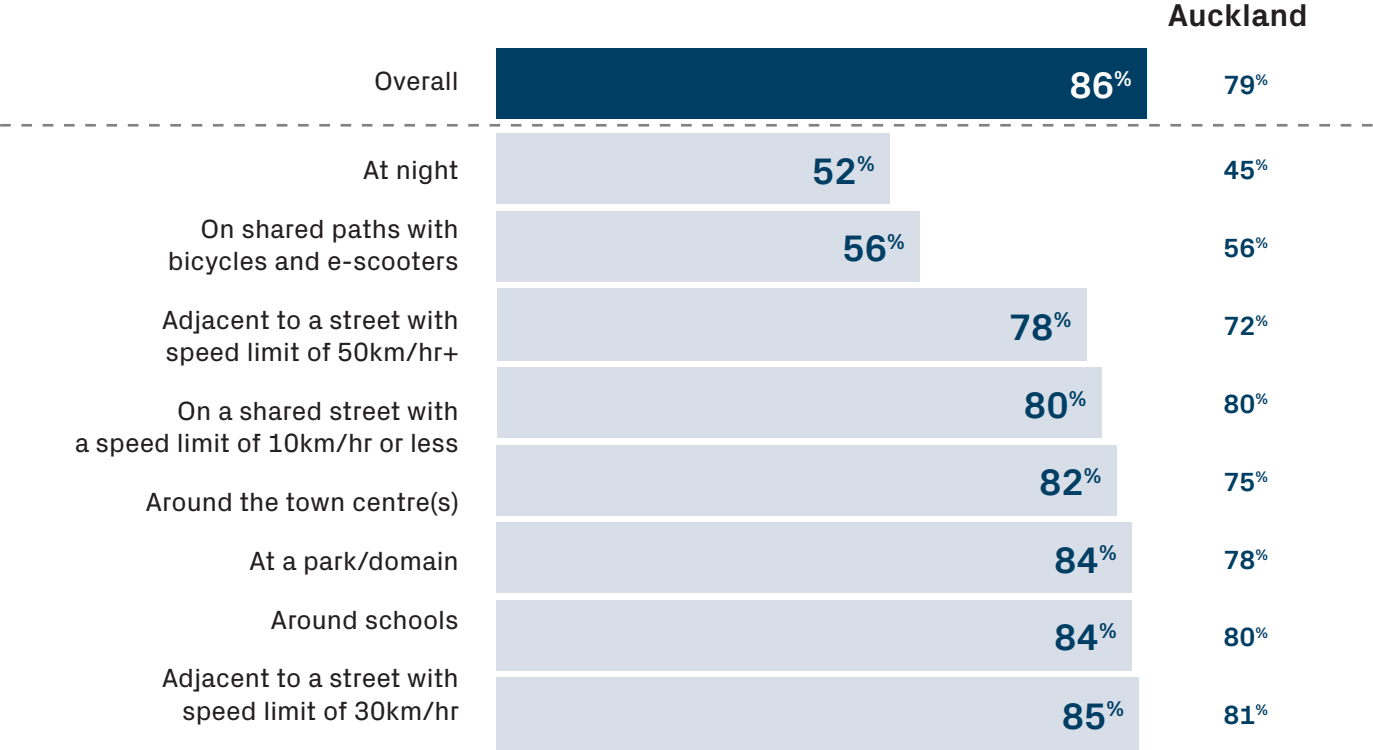


Agree that the opening of cycleways or paths has encouraged them to cycle more

Q7 - Now please think about walking and cycling in general. How much do you agree or disagree with each of the following statements Base: Cyclists n=567

For walking, shared paths and walking at night are where people feel less safe, particularly in Auckland

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



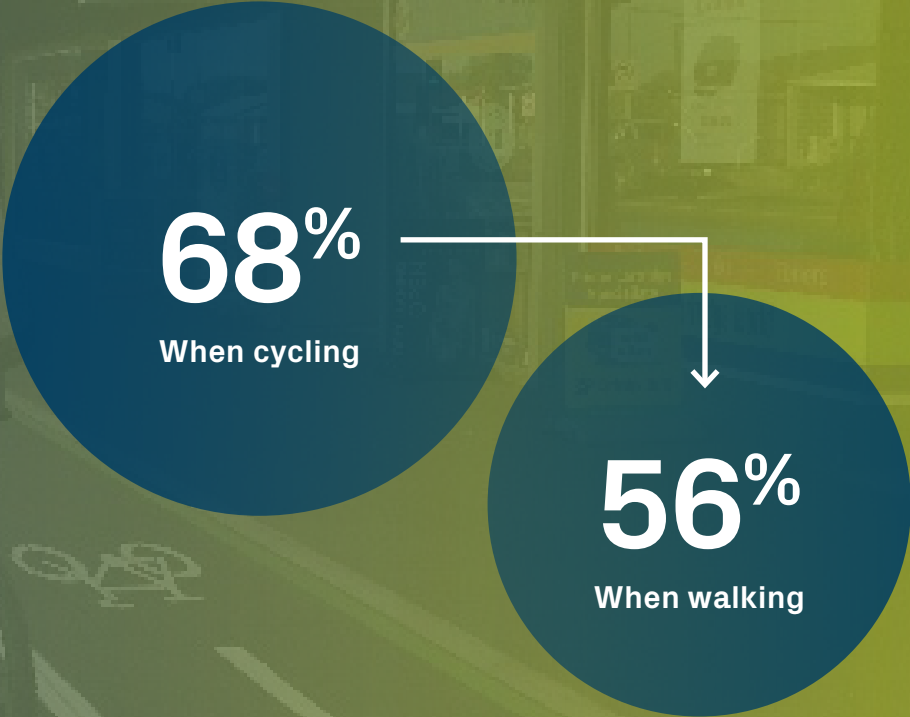
86% of people feel safe walking overall. This is a strong perception in most environments but drops down significantly at night and on shared paths. Regionally, this is a consistent pattern, however, Aucklanders are more likely to see walking environments as unsafe.

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 Total n=1,949.

Shared paths create a sense of safety for cyclists, but not so much for pedestrians

In the context of cycling, shared pathways are seen as safe. Safety of shared paths drops down by 12 percentage points for walking.

There is a desire to share these pathways but cyclists and pedestrians will need to 'share with care' to make this infrastructure most effective.

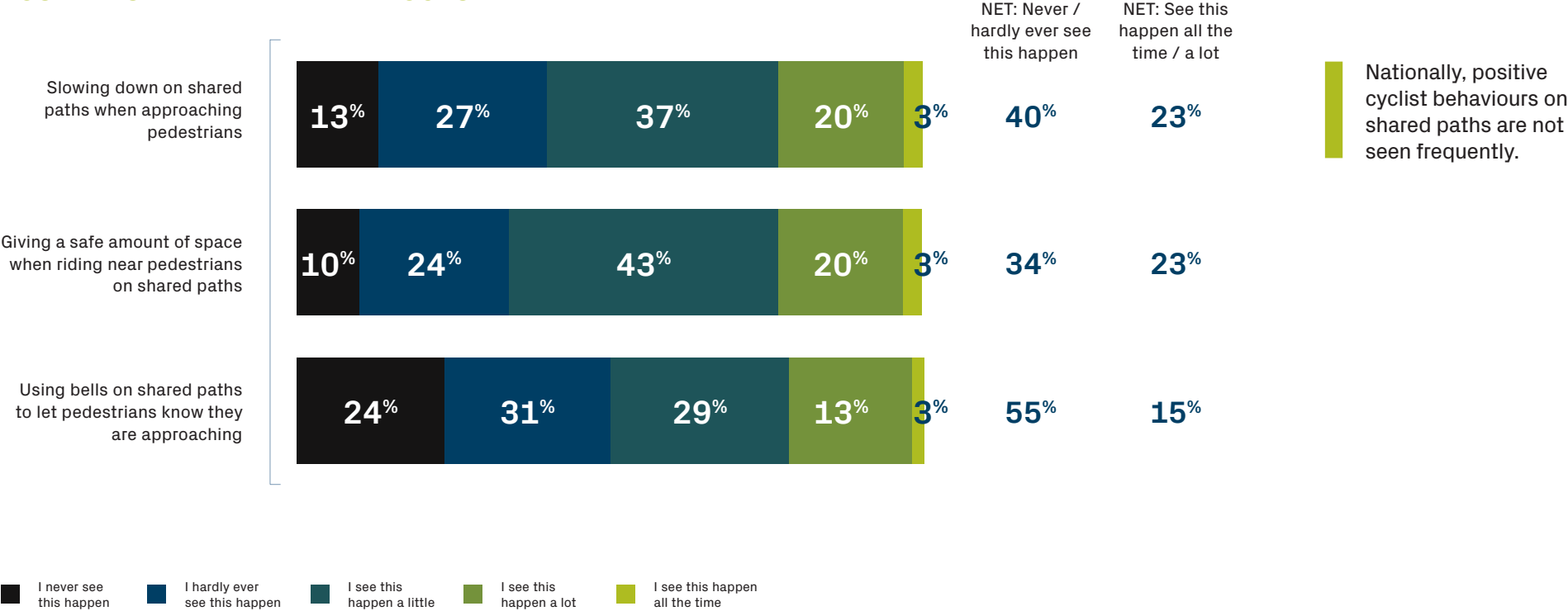


Q7A - In general, how safe are you/would you be walking in the [REGION] area? [NET Safe - 6-10 out of 10]
Base: Physically able to walk Total n=1,949
A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10]
Physically able to cycle Total n=1,962

Most people aren't seeing positive shared path behaviours often. It is these behaviours which create a sense of safety for pedestrians



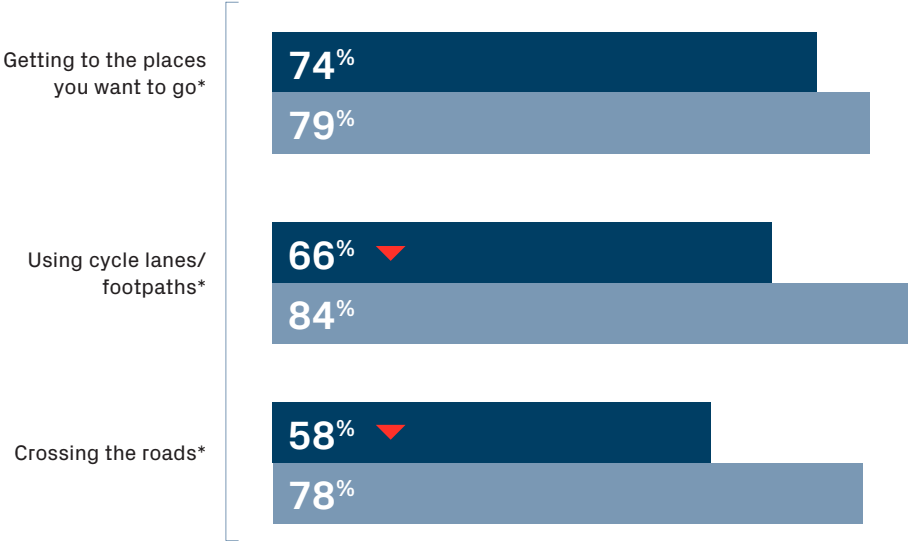
POSITIVE SHARED PATH BEHAVIOURS



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=2,256.

Walkers generally find it easy to get out and about while using footpaths, this drops down for cyclists

HOW EASY DO YOU FIND IT TO – % VERY / SOMEWHAT EASY



Getting to the places they want to go is easy for both cyclists and pedestrians.

Perceived ease of using cycle lanes and crossing the road is significantly lower for cyclists than pedestrians.

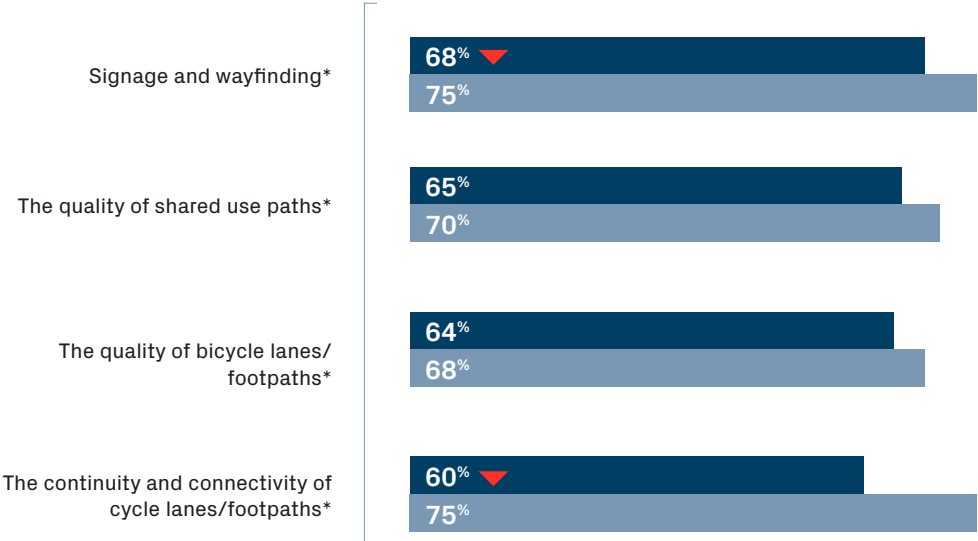
Perceptions of ease drop down even further among recreational cyclists.

■ Cyclists ■ Walkers ▼ Significantly lower than walkers

Q29 / Q29a – Using the scale below, how easy do you find it to
Base: Cyclists n=567 Walkers n=1,710
*don't know excluded from analysis

Continuity and connectivity are more of an issue for cyclists

SATISFACTION WITH INFRASTRUCTURE - % SATISFIED (5-7)



Walkers are generally satisfied with the infrastructure that is in place.

Cyclists are satisfied with signage and wayfinding, shared paths, and the quality of bicycle lanes but it is the continuity and connectivity of cycle lanes where this drops.

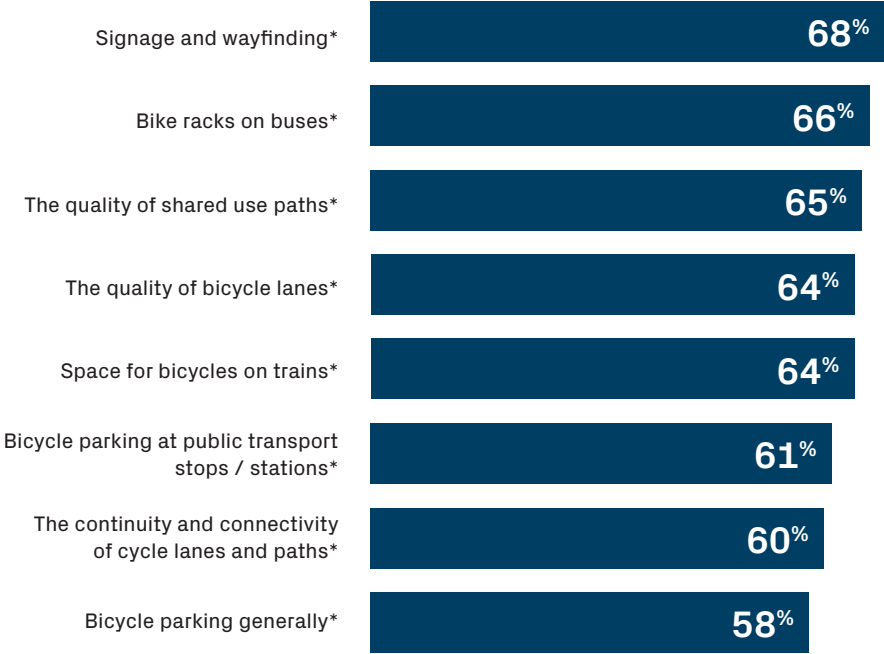
■ Cyclists ■ Walkers ▼ Significantly lower than walkers

Q29b / Q29c – Now please think about cycling / pedestrian infrastructure in [region]]. How satisfied are you with
Base: Cyclists n=567 Walkers n=1,710
*don't know excluded from analysis



For cycling, connectivity and parking are areas where satisfaction is lower

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



There are particular areas where infrastructure can be improved. Connectivity of cycle lanes and bike parking should be key focus areas for improving infrastructure.

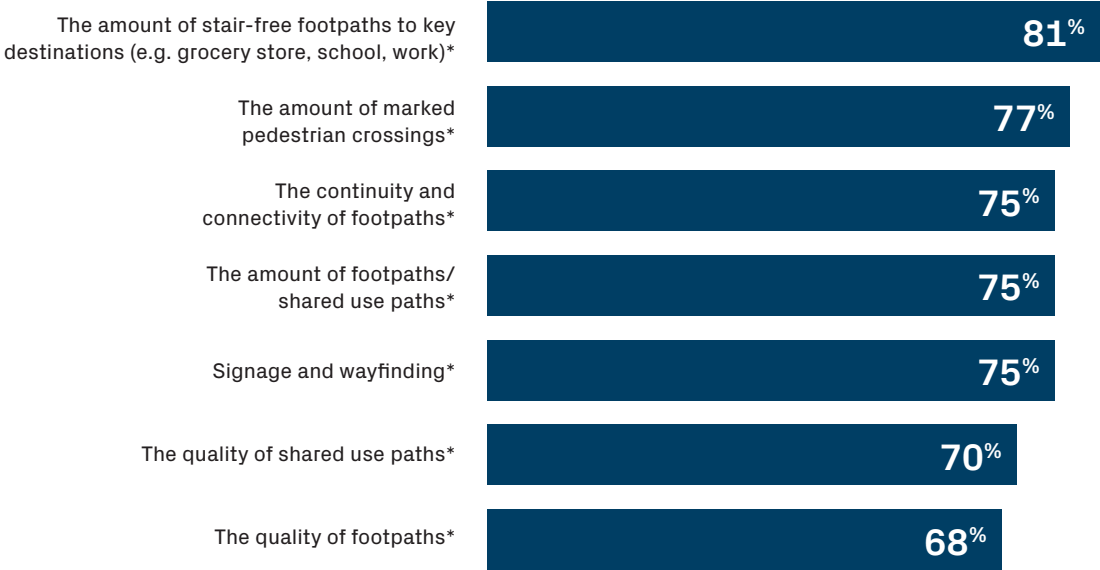
Across all infrastructure environments, recreational cyclists are less satisfied and regular riders are more satisfied.

Q29b - Now please think about cycling infrastructure in [REGION].How satisfied are you with...?
Base: Total Cyclist n=567
*don't know excluded from analysis

For walking, quality of footpaths and shared paths show the most room for improvement



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

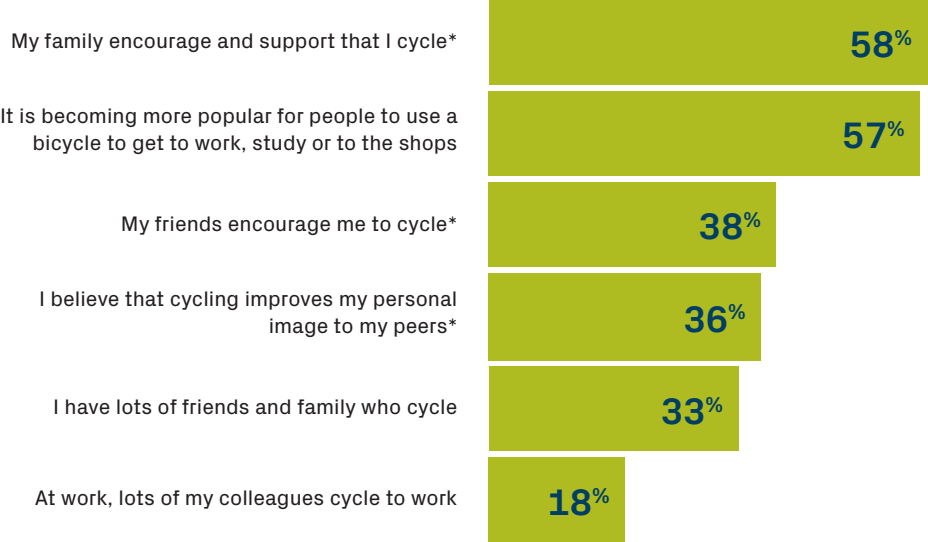


Satisfaction of walking infrastructure is consistent across the segmentation framework.

Q29c - Now please think about cycling infrastructure in [REGION].How satisfied are you with...?
Base: Walkers n=1,710
*Don't know excluded from analysis

There are other things that get people on their bike: social influences reinforce the normalisation of cycling

SOCIAL PERCEPTIONS - % STRONGLY AGREE / AGREE



Those cycling more frequently are more likely to have friends, family or colleagues who also cycle.

Q8 - How much do you agree or disagree with each of the following statements? Base: Total sample n=2,256
* Asked of cyclists n=567.

Let's talk

TRA