Understanding attitudes and perceptions of cycling & walking

NZ TRANSPORT AGENCY
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
Walking and cycling, as modes of travel, continue to be well utilised as travel choices.

68% of people take part in an active mode of travel at least once a week. This is consistent with 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.

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.

<table>
<thead>
<tr>
<th>Types of Trips Travelled</th>
<th>Utility Trips</th>
<th>Significantly Higher Than Total</th>
<th>Significantly Lower Than Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>To/from work</td>
<td>24%</td>
<td>25%</td>
<td>16%</td>
</tr>
<tr>
<td>To/from shops</td>
<td>18%</td>
<td>21%</td>
<td>19%</td>
</tr>
<tr>
<td>To/from visiting friends/family</td>
<td>10%</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>For recreation or fitness</td>
<td>9%</td>
<td>5%</td>
<td>19%</td>
</tr>
<tr>
<td>To/from somewhere else</td>
<td>9%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Take children to school/day care</td>
<td>7%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>To get to/from school, college, university</td>
<td>5%</td>
<td>3%</td>
<td>8%</td>
</tr>
<tr>
<td>As a part of work</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>To/from public transport</td>
<td>5%</td>
<td>2%</td>
<td>11%</td>
</tr>
<tr>
<td>To/from doctor/dentist/ pharmacy</td>
<td>4%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>For organised sport</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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.
Overall state of 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.

* Walk for at least 100m and/or cross the road
Across New Zealand, there is clear engagement with urban walking

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: 71%
- **Of all trips in last week by foot**: 23%
- **Participating in urban walking**: 57%

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.

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

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.

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.

02. 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.
Overall state of cycling
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

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?

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.  
- 49% of cyclists are open to cycle more often.

**NON-CYCLISTS**  
(60% of urban population)

- Amongst non-cyclists there remains a high degree of openness to future cycling.  
- 60% 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.

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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**

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

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.
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

36% 20% 12% 13% 9% 5% 4% 2%
At 51%, the majority of urban communities feel positive towards most ‘people on bikes’; although down versus 2018.

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

Hamilton, Christchurch and Wellington have all seen significant increases since 2018.

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)

2018: 57%
2019: 63%
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?
Overall, perceptions of the state of cycling remain encouraging with 55% viewing it positively.

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%).

01. 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)**

- **Investing in cycle lanes is important because it gives people more travel options**: 67% (2018) → 71% (2019)
- **Improvements have been made to the cycle paths/lanes in my area**: 47% (2018) → Added in 2019
- **My town has a well-connected cycle network**: 41% (2018) → 39% (2019)
- **There are more cycle paths/lanes in my area**: 41% (2018) → 35% (2019)
- **I’m satisfied with the availability of cycle paths/lanes in my community**: 38% (2018) → 37% (2019)
- **Cyclists are sufficiently separated from traffic**: 24% (2018) → 22% (2019)

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.
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)

- 57% I would cycle more than I currently do if the cycling infrastructure was improved

**NON-CYCLISTS**
(60% OF URBAN POPULATION)

- 23% I would start cycling if the cycling infrastructure was improved

Would start/cycle more if the cycling infrastructure was improved

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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)

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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.
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?
Continuing to grow urban walking & cycling in NZ
The ‘car’ continues to be the predominant mode of transport in New Zealand.

REGULAR MODES OF TRANSPORTATION – AT LEAST ONCE A WEEK

65% 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.
The segmentation framework helps identify where the more significant gains can be made to drive behaviour change.

The latent opportunity lies within the segments that are already cycling or walking (recreational and occasional). The challenge is to convert these segments into different types of trips (utility travel) or influence more frequent behaviour.

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.

### 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’

### 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

### Barriers
- 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

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

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)**

<table>
<thead>
<tr>
<th>Environment</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>42%</td>
<td>38%</td>
</tr>
<tr>
<td>At a park/domain</td>
<td>82%</td>
<td>84%</td>
</tr>
<tr>
<td>On a shared path or cycle path</td>
<td>68%</td>
<td>69%</td>
</tr>
<tr>
<td>On public roads, with cycle lanes separated from traffic</td>
<td>67%</td>
<td>Added in 2019</td>
</tr>
<tr>
<td>On quiet local roads</td>
<td>65%</td>
<td>68%</td>
</tr>
<tr>
<td>On public roads, with painted cycle lanes</td>
<td>60%</td>
<td>Added in 2019</td>
</tr>
<tr>
<td>In a reduced speed zone (e.g. 30kph speed limit)</td>
<td>58%</td>
<td>Added in 2019</td>
</tr>
<tr>
<td>On the footpath</td>
<td>54%</td>
<td>53%</td>
</tr>
<tr>
<td>On public roads, with no cycle lanes</td>
<td>24%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Overall safety perceptions have improved significantly since 2018.

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

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: 30% (2018: 35%)
- Riding in the centre of a lane when approaching intersections and roundabouts so they can be clearly seen*: 25% (2018: 18%)
- Groups/pairs moving into a single line to let vehicles pass: 18% (2018: 17%)
- Riding in the centre of a lane, but pulling in to the left and letting people past when they can safely*: 17% (2018: 17%)

**DRIVERS**

- Driving too close to cyclists: 34% (2018: 37%)
- Dangerous overtaking of cyclists: 30% (2018: 30%)
- Opening car doors without looking for cyclists: 30% (2018: 30%)
- Using the horn at cyclists/ jeering and/or yelling at cyclists: 15% (2018: 30%)

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?

*wording changed from 2018

Fewer people perceive drivers driving too close to cyclists - a positive change.
Positive behaviours on shared paths play a key role in ensuring cyclists feel safe

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

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

- **Giving a safe amount of space when riding near pedestrians on shared paths**: 23%
  - Urban cyclist: 33%
  - Recreational cyclist: 29%

- **Slowing down on shared paths when approaching pedestrians**: 21%
  - Urban cyclist: 33%
  - Recreational cyclist: 23%

- **Using bells on shared paths to let pedestrians know they are approaching**: 16%
  - Urban cyclist: 24%
  - Recreational cyclist: 29%
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.
Regional perspective
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

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Cyclists</th>
<th>Auckland</th>
<th>NET: Urban Cyclists</th>
<th>Auckland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auckland</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non riders</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recreational</td>
<td></td>
<td></td>
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<tr>
<td>Occasional urban rider</td>
<td></td>
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<tr>
<td>Regular urban rider</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Committed commuter</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>CYCLING FRAMEWORK</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
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</tr>
<tr>
<td>Auckland</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public perception</td>
<td>40%</td>
<td>37%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall State of Cycling</td>
<td>55%</td>
<td>51%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Safety Perceptions</td>
<td>42%</td>
<td>32%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### PUBLIC PERCEPTION

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Auckland</th>
<th>NET: Urban Cyclists</th>
<th>Auckland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall State of Cycling – NET</td>
<td>55%</td>
<td>51%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support for Cycling – NET</td>
<td>71%</td>
<td>68%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Safety Perceptions – NET</td>
<td>42%</td>
<td>32%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### COMMUNITY SUPPORT

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Auckland</th>
<th>NET: Urban Cyclists</th>
<th>Auckland</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is becoming more popular for people to use a bicycle to get to work, study or to the shops – NET</td>
<td>60%</td>
<td>57%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investing in cycle lanes is important because it gives people more travel options – NET</td>
<td>67%</td>
<td>64%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The more people using bicycles, the better it is for drivers – NET</td>
<td>63%</td>
<td>57%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>There are more cycle paths/lanes in my area – NET</td>
<td>64%</td>
<td>41%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### FUTURE BEHAVIOUR

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Auckland</th>
<th>NET: Urban Cyclists</th>
<th>Auckland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Openness to start cycling (non-cyclists) – NET</td>
<td>60%</td>
<td>56%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Openness to cycle more (cyclists) – NET</td>
<td>60%</td>
<td>56%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Year on year we see also see no change within the Auckland region.
A snapshot of the Auckland region – Walking

WALKING BEHAVIOUR

Total Walking

<table>
<thead>
<tr>
<th>Category</th>
<th>Auckland</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non walker</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>Recreational walker</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Occasional urban walker</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Regular urban walker</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Committed commuter</td>
<td>20%</td>
<td>17%</td>
</tr>
</tbody>
</table>

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

PUBLIC PERCEPTION

Overall State of Walking –NET Good

<table>
<thead>
<tr>
<th>Category</th>
<th>Auckland</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>75%</td>
<td>70%</td>
</tr>
</tbody>
</table>

Base: Total sample n=2,174 Auckland n=530
A snapshot of the Wellington region – Cycling

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.

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

**PUBLIC PERCEPTION**
- Overall State of Cycling – NET Good
- Overall Safety Perceptions – NET Safe [6-10]

**COMMUNITY SUPPORT**
- 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
- The more people using bicycles, the better it is for drivers – NET Agree

**INFRASTRUCTURE**
- 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
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.

![Bar chart showing walking behaviour and public perception in Wellington.](chart)

Wellington

- Significantly higher than 2018
- Significantly higher than total
- Significantly lower than 2018
- Significantly lower than total

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

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A snapshot of the Christchurch region – Cycling

**Public Perception**

- Overall State of Cycling – NET Good: 65%, 64%
- Overall Safety Perceptions – NET Safe [6-10]: 42%, 53%

**Community Support**

- Support for Cycling – NET Supportive [6-10]: 71%, 73%
- It is becoming more popular for people to use a bicycle to get to work, study or to the shops – NET Agree: 63%, 66%
- The more people using bicycles, the better it is for drivers – NET Agree: 35%, 35%

**Future Behaviour**

- Openness to start cycling (non-cyclists) – NET Agree: 60%, 58%
- Openness to cycle more (cyclists) – NET Agree: 49%, 46%

**Infrastructure**

- Investing in cycle lanes is important because it gives people more travel options – NET Agree: 67%, 66%
- There are more cycle paths/lanes in my area – NET Agree: 42%, 50%

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.
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.

Base: Total sample n=2,174 Christchurch n=520
A snapshot of the Hamilton region – Cycling

CYCLING BEHAVIOUR

- Total Cyclists
- NET: Urban Cyclists

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Hamilton</th>
<th>Total</th>
<th>Hamilton</th>
</tr>
</thead>
<tbody>
<tr>
<td>40%</td>
<td>42%</td>
<td>29%</td>
<td>31%</td>
<td></td>
</tr>
</tbody>
</table>

CYCLING FRAMEWORK

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

PUBLIC PERCEPTION

- Overall State of Cycling – NET Good
- Overall Safety Perceptions – NET Safe [6-10]

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Hamilton</th>
<th>Total</th>
<th>Hamilton</th>
</tr>
</thead>
<tbody>
<tr>
<td>55%</td>
<td>51%</td>
<td>42%</td>
<td>44%</td>
<td></td>
</tr>
</tbody>
</table>

COMMUNITY SUPPORT

- 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
- The more people using bicycles, the better it is for drivers – NET Agree

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Hamilton</th>
<th>Total</th>
<th>Hamilton</th>
</tr>
</thead>
<tbody>
<tr>
<td>71%</td>
<td>70%</td>
<td>63%</td>
<td>62%</td>
<td></td>
</tr>
</tbody>
</table>

INFRASTRUCTURE

- 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

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Hamilton</th>
<th>Total</th>
<th>Hamilton</th>
</tr>
</thead>
<tbody>
<tr>
<td>67%</td>
<td>75%</td>
<td>41%</td>
<td>35%</td>
<td></td>
</tr>
</tbody>
</table>

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

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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.

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

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A snapshot of the Tauranga region – Cycling

**PUBLIC PERCEPTION**
- Overall State of Cycling – NET Good
- Overall Safety Perceptions – NET Safe [6-10]

**COMMUNITY SUPPORT**
- 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
- The more people using bicycles, the better it is for drivers – NET Agree

**INFRASTRUCTURE**
- 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

**CYCLING BEHAVIOUR**
- Total Cyclists
  - Total: 40%
  - Tauranga: 29%
- NET: Urban Cyclists
  - Total: 60%
  - Tauranga: 65%

**FUTURE BEHAVIOUR**
- Openness to start cycling (non-cyclists) – NET Agree
  - Total: 60%
  - Tauranga: 49%
- Openness to cycle more (cyclists) – NET Agree
  - Total: 65%
  - Tauranga: 54%

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.

Base: Total sample n=2,174 Tauranga n=205
A snapshot of the Tauranga region – Walking

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

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

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A snapshot of the Dunedin region – Cycling

**Public Perception**
- Overall State of Cycling: NET Good
- Overall Safety Perceptions: NET Safe

**Community Support**
- Support for Cycling: NET Supportive
- It is becoming more popular for people to use a bicycle to get to work, study or to the shops
- The more people using bicycles, the better it is for drivers

**Infrastructure**
- Investing in cycle lanes is important because it gives people more travel options
- There are more cycle paths/lanes in my area

**Future Behaviour**
- Openness to start cycling (non-cyclists): NET Agree
- Openness to cycle more (cyclists): NET Agree

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.
A snapshot of the Dunedin region – Walking

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

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

Overall State of Walking –NET Good

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Dunedin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Significantly higher than total</td>
<td>75%</td>
<td>80%</td>
</tr>
</tbody>
</table>

**WALKING BEHAVIOUR**

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Dunedin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Walking</td>
<td>70%</td>
<td>77%</td>
</tr>
<tr>
<td>NET: Urban Walking</td>
<td>57%</td>
<td>68%</td>
</tr>
<tr>
<td>Non walker</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>Recreational walker</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Occasional urban walker</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Regular urban walker</td>
<td>24%</td>
<td>27%</td>
</tr>
<tr>
<td>Committed commuter</td>
<td>20%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Significantly higher than 2018
Significantly lower than total
6 Bringing it all together
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
Let’s talk
Appendix
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
<table>
<thead>
<tr>
<th>REASON</th>
<th>TOTAL</th>
<th>AUCKLAND</th>
<th>WELLINGTON</th>
<th>CHRISTCHURCH</th>
<th>HAMILTON</th>
<th>TAURANGA</th>
<th>DUNEDIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keeps me fit/helps me get fitter</td>
<td>62%</td>
<td>51%</td>
<td>61%</td>
<td>70%</td>
<td>63%</td>
<td>66%</td>
<td>66%</td>
</tr>
<tr>
<td>It's fun, I enjoy cycling</td>
<td>59%</td>
<td>55%</td>
<td>60%</td>
<td>58%</td>
<td>59%</td>
<td>63%</td>
<td>57%</td>
</tr>
<tr>
<td>It's cheaper/saves money</td>
<td>44%</td>
<td>38%</td>
<td>41%</td>
<td>54%</td>
<td>42%</td>
<td>37%</td>
<td>43%</td>
</tr>
<tr>
<td>Allows me to enjoy the weather</td>
<td>33%</td>
<td>30%</td>
<td>39%</td>
<td>33%</td>
<td>29%</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>Provides me with some 'me time'</td>
<td>33%</td>
<td>29%</td>
<td>33%</td>
<td>36%</td>
<td>34%</td>
<td>30%</td>
<td>38%</td>
</tr>
<tr>
<td>Helps address environmental concerns</td>
<td>28%</td>
<td>25%</td>
<td>28%</td>
<td>34%</td>
<td>17%</td>
<td>33%</td>
<td>26%</td>
</tr>
<tr>
<td>Avoids parking hassles</td>
<td>27%</td>
<td>22%</td>
<td>29%</td>
<td>33%</td>
<td>16%</td>
<td>30%</td>
<td>24%</td>
</tr>
<tr>
<td>Saves time - I can get there faster by bike</td>
<td>20%</td>
<td>19%</td>
<td>20%</td>
<td>23%</td>
<td>15%</td>
<td>14%</td>
<td>22%</td>
</tr>
<tr>
<td>Availability of cycle ways or cycle paths</td>
<td>18%</td>
<td>20%</td>
<td>17%</td>
<td>17%</td>
<td>19%</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>More convenient than driving/public transport</td>
<td>18%</td>
<td>19%</td>
<td>13%</td>
<td>22%</td>
<td>14%</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>Too much traffic to drive - helps reduce traffic congestion</td>
<td>16%</td>
<td>19%</td>
<td>12%</td>
<td>15%</td>
<td>17%</td>
<td>21%</td>
<td>16%</td>
</tr>
<tr>
<td>Separate off-road paths make it safer to cycle</td>
<td>16%</td>
<td>13%</td>
<td>15%</td>
<td>18%</td>
<td>20%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Painted cycle lanes make it safer to cycle</td>
<td>15%</td>
<td>19%</td>
<td>8%</td>
<td>17%</td>
<td>17%</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Better routes are available than previously</td>
<td>13%</td>
<td>18%</td>
<td>8%</td>
<td>14%</td>
<td>13%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>More consistent travel time</td>
<td>12%</td>
<td>15%</td>
<td>9%</td>
<td>13%</td>
<td>10%</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Want to make the most of a new bike</td>
<td>11%</td>
<td>17%</td>
<td>7%</td>
<td>9%</td>
<td>8%</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>There's physical barriers between motorists &amp; cyclists</td>
<td>8%</td>
<td>11%</td>
<td>2%</td>
<td>10%</td>
<td>6%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>To get to/from public transport</td>
<td>7%</td>
<td>9%</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Availability of cycle parking at public transport interchanges/stations</td>
<td>6%</td>
<td>9%</td>
<td>4%</td>
<td>7%</td>
<td>4%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Reason</td>
<td>Total</td>
<td>Auckland</td>
<td>Wellington</td>
<td>Christchurch</td>
<td>Hamilton</td>
<td>Tauranga</td>
<td>Dunedin</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
<td>--------</td>
<td>----------</td>
<td>------------</td>
<td>--------------</td>
<td>----------</td>
<td>----------</td>
<td>---------</td>
</tr>
<tr>
<td>I don't feel safe because of how people drive</td>
<td>47%</td>
<td>53%</td>
<td>47%</td>
<td>44%</td>
<td>38%</td>
<td>49%</td>
<td>42%</td>
</tr>
<tr>
<td>I don't feel safe cycling in the dark</td>
<td>40%</td>
<td>47%</td>
<td>37%</td>
<td>39%</td>
<td>34%</td>
<td>42%</td>
<td>32%</td>
</tr>
<tr>
<td>I'm concerned about the speed of other road users</td>
<td>39%</td>
<td>41%</td>
<td>37%</td>
<td>39%</td>
<td>37%</td>
<td>47%</td>
<td>32%</td>
</tr>
<tr>
<td>It's not enjoyable because of the weather</td>
<td>33%</td>
<td>37%</td>
<td>37%</td>
<td>35%</td>
<td>27%</td>
<td>17%</td>
<td>31%</td>
</tr>
<tr>
<td>Cycling is not a quick way for me to get where I need to go</td>
<td>29%</td>
<td>36%</td>
<td>25%</td>
<td>31%</td>
<td>29%</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>There's not enough cycle lanes or routes that are physically separated from drivers</td>
<td>28%</td>
<td>38%</td>
<td>34%</td>
<td>20%</td>
<td>25%</td>
<td>27%</td>
<td>14%</td>
</tr>
<tr>
<td>I live too far away for it to be practical</td>
<td>28%</td>
<td>29%</td>
<td>34%</td>
<td>27%</td>
<td>21%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>I don't have access to a bike</td>
<td>28%</td>
<td>32%</td>
<td>30%</td>
<td>20%</td>
<td>23%</td>
<td>23%</td>
<td>35%</td>
</tr>
<tr>
<td>Having to shower and/or change after cycling is inconvenient</td>
<td>25%</td>
<td>30%</td>
<td>27%</td>
<td>22%</td>
<td>24%</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>There's no secure place to leave a bike when out and about</td>
<td>24%</td>
<td>27%</td>
<td>26%</td>
<td>20%</td>
<td>26%</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>It's not enjoyable because of the hills</td>
<td>23%</td>
<td>28%</td>
<td>34%</td>
<td>6%</td>
<td>13%</td>
<td>15%</td>
<td>43%</td>
</tr>
<tr>
<td>There's not enough painted cycle lanes on roads in my area</td>
<td>21%</td>
<td>30%</td>
<td>25%</td>
<td>16%</td>
<td>17%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>I have to think about transporting other people</td>
<td>19%</td>
<td>20%</td>
<td>15%</td>
<td>20%</td>
<td>20%</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>I can't be bothered/too much effort</td>
<td>17%</td>
<td>18%</td>
<td>17%</td>
<td>16%</td>
<td>21%</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>I don't like wearing a helmet</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>18%</td>
<td>17%</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>Some other reason</td>
<td>9%</td>
<td>6%</td>
<td>11%</td>
<td>11%</td>
<td>10%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>I don't know enough about cycling or where to get information</td>
<td>6%</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>
## Motivators to Walking....

<table>
<thead>
<tr>
<th>REASON</th>
<th>TOTAL</th>
<th>AUCKLAND</th>
<th>WELLINGTON</th>
<th>CHRISTCHURCH</th>
<th>HAMILTON</th>
<th>TAURANGA</th>
<th>DUNEDIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keeps me fit/helps me get fitter</td>
<td>72%</td>
<td>70%</td>
<td>72%</td>
<td>74%</td>
<td>68%</td>
<td>75%</td>
<td>76%</td>
</tr>
<tr>
<td>It’s fun, I enjoy walking</td>
<td>55%</td>
<td>54%</td>
<td>54%</td>
<td>56%</td>
<td>49%</td>
<td>63%</td>
<td>58%</td>
</tr>
<tr>
<td>Allows me to enjoy the weather</td>
<td>45%</td>
<td>39%</td>
<td>46%</td>
<td>47%</td>
<td>42%</td>
<td>54%</td>
<td>46%</td>
</tr>
<tr>
<td>It’s cheaper/saves money</td>
<td>45%</td>
<td>39%</td>
<td>52%</td>
<td>47%</td>
<td>45%</td>
<td>28%</td>
<td>52%</td>
</tr>
<tr>
<td>Provides me with some ‘me time’</td>
<td>43%</td>
<td>40%</td>
<td>43%</td>
<td>47%</td>
<td>36%</td>
<td>41%</td>
<td>51%</td>
</tr>
<tr>
<td>Avoids parking hassles</td>
<td>33%</td>
<td>30%</td>
<td>35%</td>
<td>32%</td>
<td>34%</td>
<td>27%</td>
<td>43%</td>
</tr>
<tr>
<td>Availability of paths/walking routes</td>
<td>26%</td>
<td>29%</td>
<td>28%</td>
<td>21%</td>
<td>22%</td>
<td>31%</td>
<td>29%</td>
</tr>
<tr>
<td>More convenient than driving/public transport</td>
<td>24%</td>
<td>22%</td>
<td>30%</td>
<td>20%</td>
<td>25%</td>
<td>16%</td>
<td>29%</td>
</tr>
<tr>
<td>Helps address environmental concerns</td>
<td>21%</td>
<td>19%</td>
<td>23%</td>
<td>21%</td>
<td>17%</td>
<td>18%</td>
<td>24%</td>
</tr>
<tr>
<td>Saves time - I can get there faster by walking</td>
<td>19%</td>
<td>16%</td>
<td>27%</td>
<td>13%</td>
<td>17%</td>
<td>15%</td>
<td>22%</td>
</tr>
<tr>
<td>There is no other way to get where I want to go</td>
<td>15%</td>
<td>17%</td>
<td>17%</td>
<td>12%</td>
<td>11%</td>
<td>9%</td>
<td>21%</td>
</tr>
<tr>
<td>Too much traffic to drive - helps reduce traffic congestion</td>
<td>14%</td>
<td>13%</td>
<td>16%</td>
<td>13%</td>
<td>14%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Better walking routes are available now</td>
<td>12%</td>
<td>13%</td>
<td>11%</td>
<td>10%</td>
<td>15%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Reason</td>
<td>Total</td>
<td>Auckland</td>
<td>Wellington</td>
<td>Christchurch</td>
<td>Hamilton</td>
<td>Tauranga</td>
<td>Dunedin</td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
<td>-------</td>
<td>----------</td>
<td>------------</td>
<td>--------------</td>
<td>----------</td>
<td>----------</td>
<td>---------</td>
</tr>
<tr>
<td>It's not enjoyable because of the weather</td>
<td>31%</td>
<td>32%</td>
<td>37%</td>
<td>30%</td>
<td>30%</td>
<td>22%</td>
<td>28%</td>
</tr>
<tr>
<td>Walking is not a quick way for me to get where I need to go</td>
<td>31%</td>
<td>31%</td>
<td>26%</td>
<td>34%</td>
<td>36%</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>I don't feel safe walking in the dark</td>
<td>29%</td>
<td>34%</td>
<td>26%</td>
<td>29%</td>
<td>29%</td>
<td>28%</td>
<td>21%</td>
</tr>
<tr>
<td>I always have too much stuff to carry</td>
<td>25%</td>
<td>27%</td>
<td>26%</td>
<td>27%</td>
<td>23%</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td>I live too far away for it to be practical</td>
<td>25%</td>
<td>26%</td>
<td>25%</td>
<td>28%</td>
<td>23%</td>
<td>23%</td>
<td>24%</td>
</tr>
<tr>
<td>Walking adds too much time to my journey</td>
<td>22%</td>
<td>25%</td>
<td>19%</td>
<td>24%</td>
<td>22%</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>None of these</td>
<td>19%</td>
<td>15%</td>
<td>20%</td>
<td>20%</td>
<td>16%</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>I can't be bothered/too much effort</td>
<td>15%</td>
<td>15%</td>
<td>12%</td>
<td>16%</td>
<td>23%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>I have to think about transporting other people</td>
<td>15%</td>
<td>15%</td>
<td>12%</td>
<td>17%</td>
<td>19%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>It's not enjoyable because of the hills</td>
<td>12%</td>
<td>17%</td>
<td>15%</td>
<td>3%</td>
<td>8%</td>
<td>9%</td>
<td>21%</td>
</tr>
<tr>
<td>I don't know how long walking will take</td>
<td>9%</td>
<td>11%</td>
<td>8%</td>
<td>9%</td>
<td>14%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>The pavements/footpaths are not in good condition in my area</td>
<td>8%</td>
<td>13%</td>
<td>6%</td>
<td>7%</td>
<td>9%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Having to shower and/or change after walking is inconvenient</td>
<td>8%</td>
<td>11%</td>
<td>7%</td>
<td>5%</td>
<td>10%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>I don't feel safe because of how people drive</td>
<td>7%</td>
<td>10%</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Some other reason (please specify)</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>I don't feel safe because other footpath users pass me too closely</td>
<td>4%</td>
<td>5%</td>
<td>3%</td>
<td>4%</td>
<td>5%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>I don't feel safe because of the speed of other footpath users</td>
<td>4%</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>I don't feel safe walking in the day</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>0%</td>
</tr>
</tbody>
</table>
Auckland region in more detail...

Cycling behaviour

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - AUCKLAND</th>
<th>Auckland Central</th>
<th>Auckland West</th>
<th>Auckland North</th>
<th>Auckland South/East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Committed commuter</td>
<td>2%</td>
<td>9%</td>
<td>16%</td>
<td>10%</td>
<td>63%</td>
</tr>
<tr>
<td>Regular urban rider</td>
<td>6%</td>
<td>6%</td>
<td>15%</td>
<td>17%</td>
<td>60%</td>
</tr>
<tr>
<td>Occasional urban rider</td>
<td>15%</td>
<td>15%</td>
<td>7%</td>
<td>10%</td>
<td>71%</td>
</tr>
<tr>
<td>Recreational</td>
<td>1%</td>
<td>5%</td>
<td>5%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Non riders</td>
<td>5%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Overall state of cycling – NET Good

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - AUCKLAND</th>
<th>Auckland Central</th>
<th>Auckland West</th>
<th>Auckland North</th>
<th>Auckland South/East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good</td>
<td>51%</td>
<td>58%</td>
<td>56%</td>
<td>52%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Overall safety perceptions – NET Safe [6-10]

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - AUCKLAND</th>
<th>Auckland Central</th>
<th>Auckland West</th>
<th>Auckland North</th>
<th>Auckland South/East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safe</td>
<td>32%</td>
<td>42%</td>
<td>28%</td>
<td>35%</td>
<td>22%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - AUCKLAND</th>
<th>Auckland Central</th>
<th>Auckland West</th>
<th>Auckland North</th>
<th>Auckland South/East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>64%</td>
<td>71%</td>
<td>60%</td>
<td>68%</td>
<td>56%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - AUCKLAND</th>
<th>Auckland Central</th>
<th>Auckland West</th>
<th>Auckland North</th>
<th>Auckland South/East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>33%</td>
<td>39%</td>
<td>33%</td>
<td>37%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Support for cycling – NET Supportive [6-10]

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - AUCKLAND</th>
<th>Auckland Central</th>
<th>Auckland West</th>
<th>Auckland North</th>
<th>Auckland South/East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>68%</td>
<td>75%</td>
<td>68%</td>
<td>68%</td>
<td>59%</td>
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</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - AUCKLAND</th>
<th>Auckland Central</th>
<th>Auckland West</th>
<th>Auckland North</th>
<th>Auckland South/East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>57%</td>
<td>66%</td>
<td>58%</td>
<td>54%</td>
<td>51%</td>
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</tbody>
</table>
Wellington region in more detail...

CYCLING BEHAVIOUR

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - WELLINGTON</th>
<th>Wellington City</th>
<th>Lower Hutt</th>
<th>Upper Hutt</th>
<th>Porirua</th>
<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Committed commuter</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
<td>11%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Regular urban riders</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
<td>11%</td>
<td>8%</td>
<td>25%</td>
<td>79%</td>
</tr>
<tr>
<td>Occasional urban rider</td>
<td>9%</td>
<td>5%</td>
<td>2%</td>
<td>5%</td>
<td>9%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Recreational</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Non riders</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Overall state of cycling – NET Good

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - WELLINGTON</th>
<th>Wellington City</th>
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<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET Good</td>
<td>51%</td>
<td>53%</td>
<td>60%</td>
<td>48%</td>
<td>43%</td>
<td>43%</td>
<td>37%</td>
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</tbody>
</table>

Overall safety perceptions – NET Safe [6-10]

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - WELLINGTON</th>
<th>Wellington City</th>
<th>Lower Hutt</th>
<th>Upper Hutt</th>
<th>Porirua</th>
<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET Safe [6-10]</td>
<td>33%</td>
<td>35%</td>
<td>40%</td>
<td>22%</td>
<td>33%</td>
<td>24%</td>
<td>23%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
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<th>Wellington City</th>
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<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET Agree</td>
<td>66%</td>
<td>64%</td>
<td>69%</td>
<td>63%</td>
<td>59%</td>
<td>88%</td>
<td>52%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - WELLINGTON</th>
<th>Wellington City</th>
<th>Lower Hutt</th>
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<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET Agree</td>
<td>35%</td>
<td>44%</td>
<td>25%</td>
<td>25%</td>
<td>23%</td>
<td>39%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Support for cycling – NET Supportive [6-10]

<table>
<thead>
<tr>
<th></th>
<th>TOTAL - WELLINGTON</th>
<th>Wellington City</th>
<th>Lower Hutt</th>
<th>Upper Hutt</th>
<th>Porirua</th>
<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET Supportive</td>
<td>72%</td>
<td>72%</td>
<td>80%</td>
<td>66%</td>
<td>69%</td>
<td>83%</td>
<td>49%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
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<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET Agree</td>
<td>64%</td>
<td>73%</td>
<td>64%</td>
<td>44%</td>
<td>54%</td>
<td>77%</td>
<td>47%</td>
</tr>
</tbody>
</table>
**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

**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
- Regularly use bicycle, electric bike

**GENERAL BEHAVIOURS**

- Overall state of Cycling: Very good
- Overall state of Walking: Very Good
- State of Cyclists: Positive

**ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO**

- More safe

**PROFILE**

- **Age**: 18-34 years
- **Gender**: Male
- **Region**: Christchurch
- **HH Income**: $50k-$100k
- **HH Structure**: Single income no kids
- **Self identification**: Regular commuter

---

APPROVED FOR PUBLIC RELEASE © TRA 2019
Regular Urban Riders

**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

**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

**Base:** Regular urban riders n=165
Occasional Urban Riders

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

AGREE 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: No skew
Areas safe: Quiet local roads, footpath, public roads with cycle lanes separated from traffic, reduced speed zone
Areas unsafe: No skew

LEVEL OF CYCLING SUPPORT
In community: Supportive

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

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO
More safe

Base: Occasional urban riders n=381
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

DISAGREE THAT
• My family encourage and support that I cycle
• My friends admire and encourage me to cycle

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

WALKING BEHAVIOURS
Walking the same as a year ago

LEVEL OF CYCLING SUPPORT
In community: Supportive

GENERAL BEHAVIOURS
Regularly walk
Consider it easy to:
• Get out and about outside

Base: Recreational On Road n=173
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

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
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

WALKING BEHAVIOURS
Walking less than a year ago

LEVEL OF CYCLING SUPPORT
In community: Supportive

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

WALKING BEHAVIOURS
In the last week, travelled for:
• Doctor / dentist / pharmacy

Base: Supportive Non Riders n=803
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

LEVEL OF CYCLING SUPPORT
In community: Very unsupportive

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO
Less safe

GENERAL BEHAVIOURS
Regularly use private vehicle

Base: Less Supportive Non Riders n=517
Let’s talk