

Encouraging behaviour change between cyclists and motorists

SHARE THE ROAD – NZTA

STUDY ORIGINALLY CONDUCTED NOVEMBER 2017

NZTA

TRA

The opportunity for New Zealand



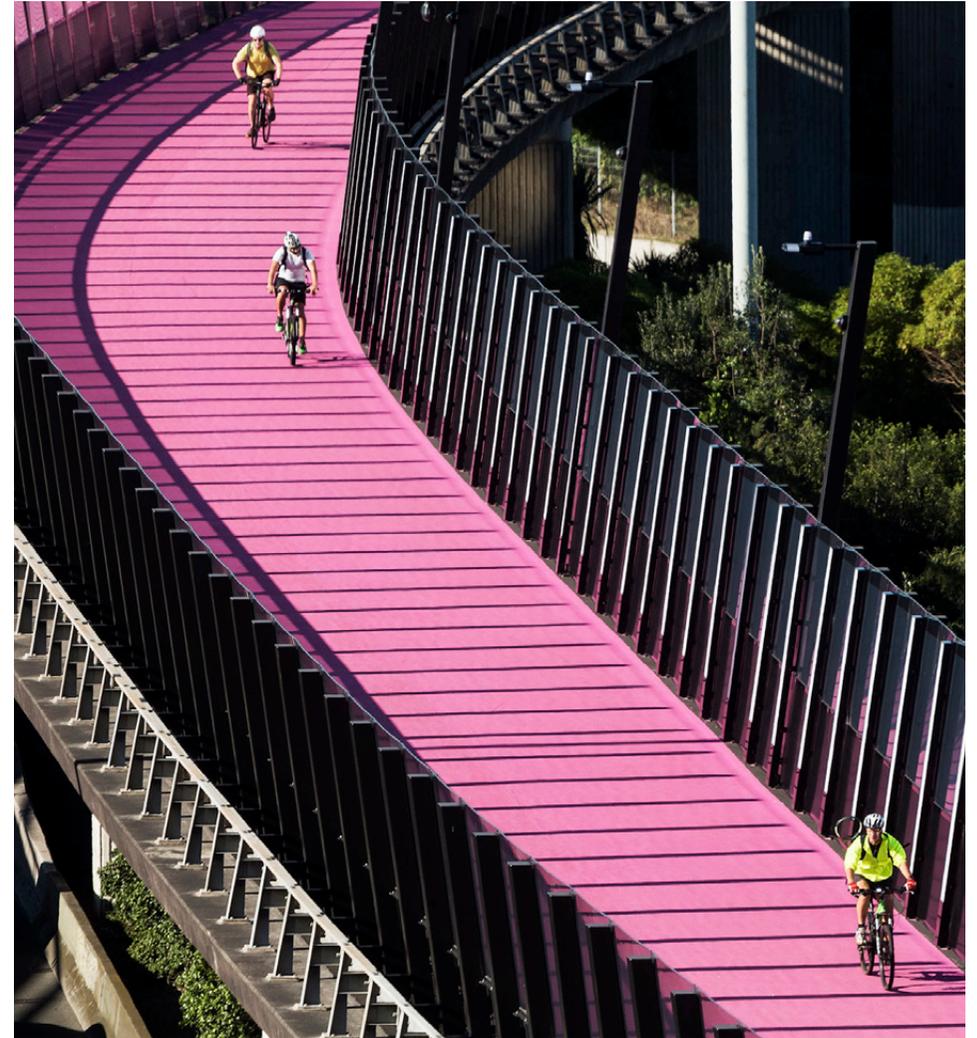
Cycling will play a critical part in all strategic priorities for both the land transport system and NZTA specifically. But to effectively mobilise cycling, NZTA would like to develop a holistic investment plan, community engagement programme and public education to realise the significant opportunity cycling has in New Zealand.

Ultimately, a holistic 'share the road' programme will have significant and positive outcomes on the GPS strategy for 2018 and beyond.

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



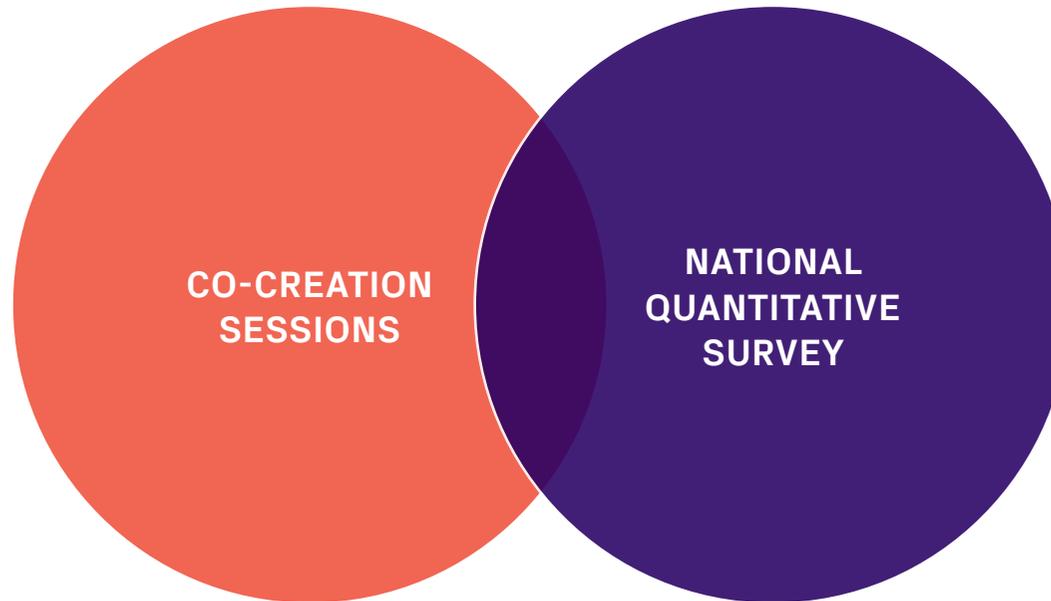
This document has been developed to form a detailed understanding of behaviour on the road, motorists' perceptions and attitudes when it comes to cycling and sharing the road.



There were two core components to the methodology

Co-creation sessions – to understand the subtle differences in perceptions between drivers and cyclists.

24 people in total held in Auckland and Christchurch



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

N=1,507 motorists, based on region, age and gender.

This document

1

Sharing the road
in context

2

Perceptions and
behaviour on the
road

3

The motorist
& cyclist
relationship

4

Footpath cycling

5

Bringing it all
together

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

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

CYCLING IS A GOOD THING

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

CYCLING WILL CONTINUE TO GROW

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

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



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

However, with growth comes a tension around infrastructure and congestion

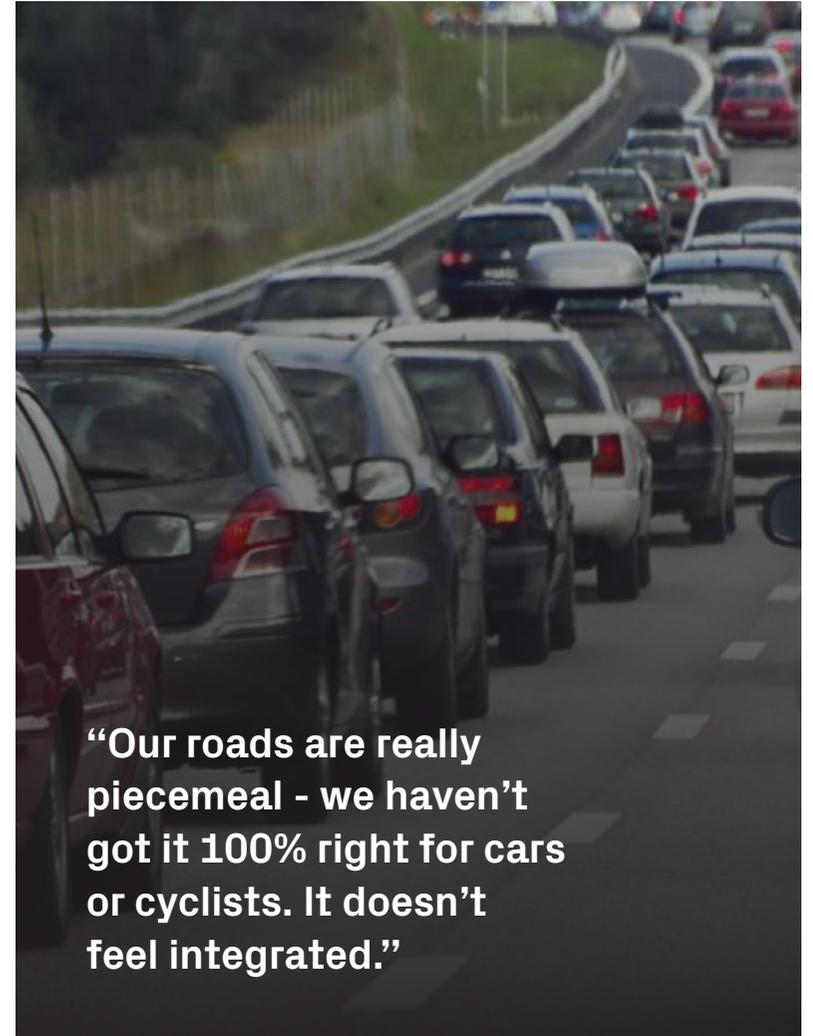
CURRENT TRANSPORT INFRASTRUCTURE

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

THE ROADS WILL CONTINUE TO GET BUSIER

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

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



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

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

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

KIWIS ARE BAD DRIVERS

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

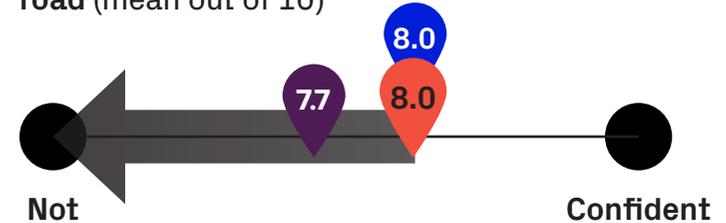
FEELING UNSAFE ON THE ROAD

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

Urban & Suburban Auckland and Wellington view
 Q. How confident are you as a motorist?
 Q. How confident are you as a cyclist?
 Base: n=1,507 (motorists), n=610 (cyclist)



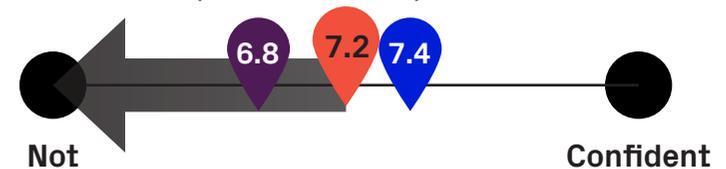
Motorists confidence on the road (mean out of 10)



27% feeling a lack of confidence (0-7 out of 10)



Cyclists confidence on the road (mean out of 10)



52% feeling a lack of confidence (0-7 out of 10)

● Auckland ● Wellington ● National

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

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

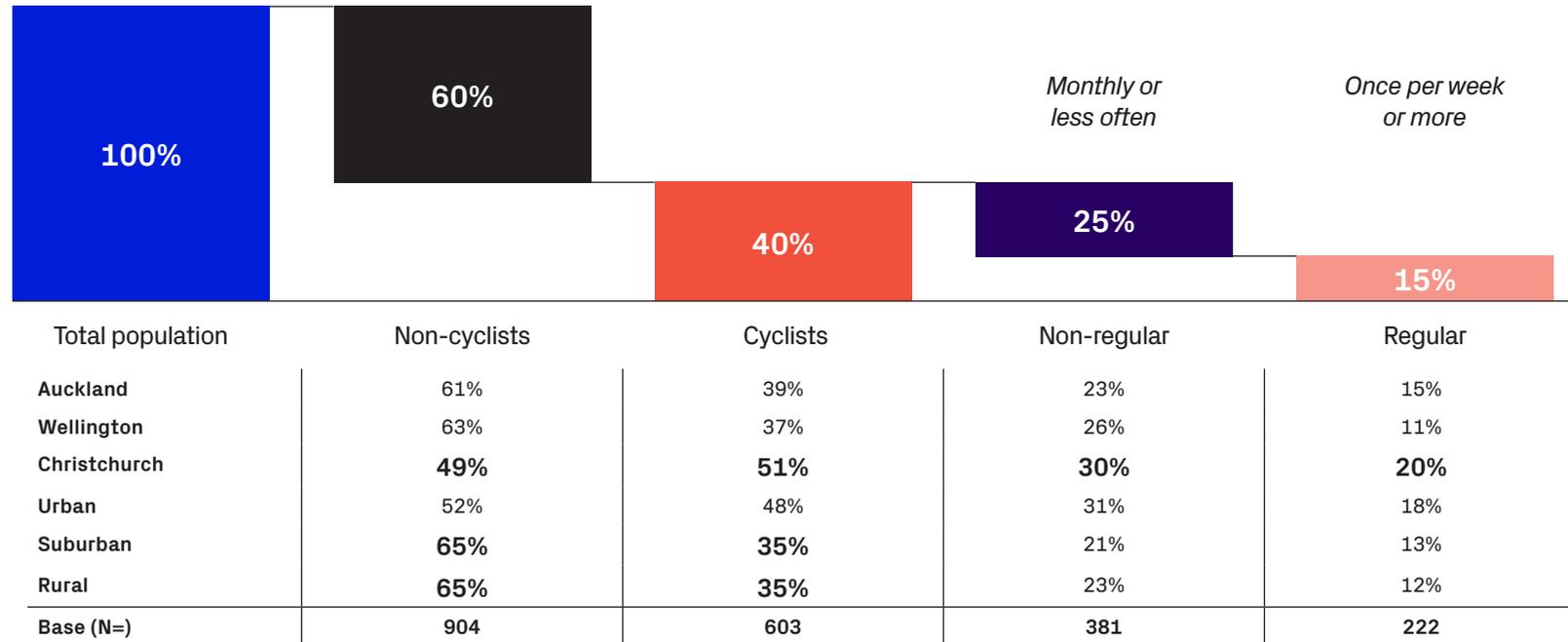
Only through a shared purpose will we truly see behaviour change.

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

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

Cycling has made a comeback, it is no longer a nice activity, it is now a viable mode of transport

Cycling Penetration (New Zealand Population)



Urban & Suburban Auckland, Wellington and Christchurch view
 Q. On average, how often do you do the following?
 Q. (Which part of the country do you currently live in? Please select the region that is closest to you.)
 Q. (Which of the following best describes where you live?)
 Base: n=1,507 (motorists), n=610 (cyclist)

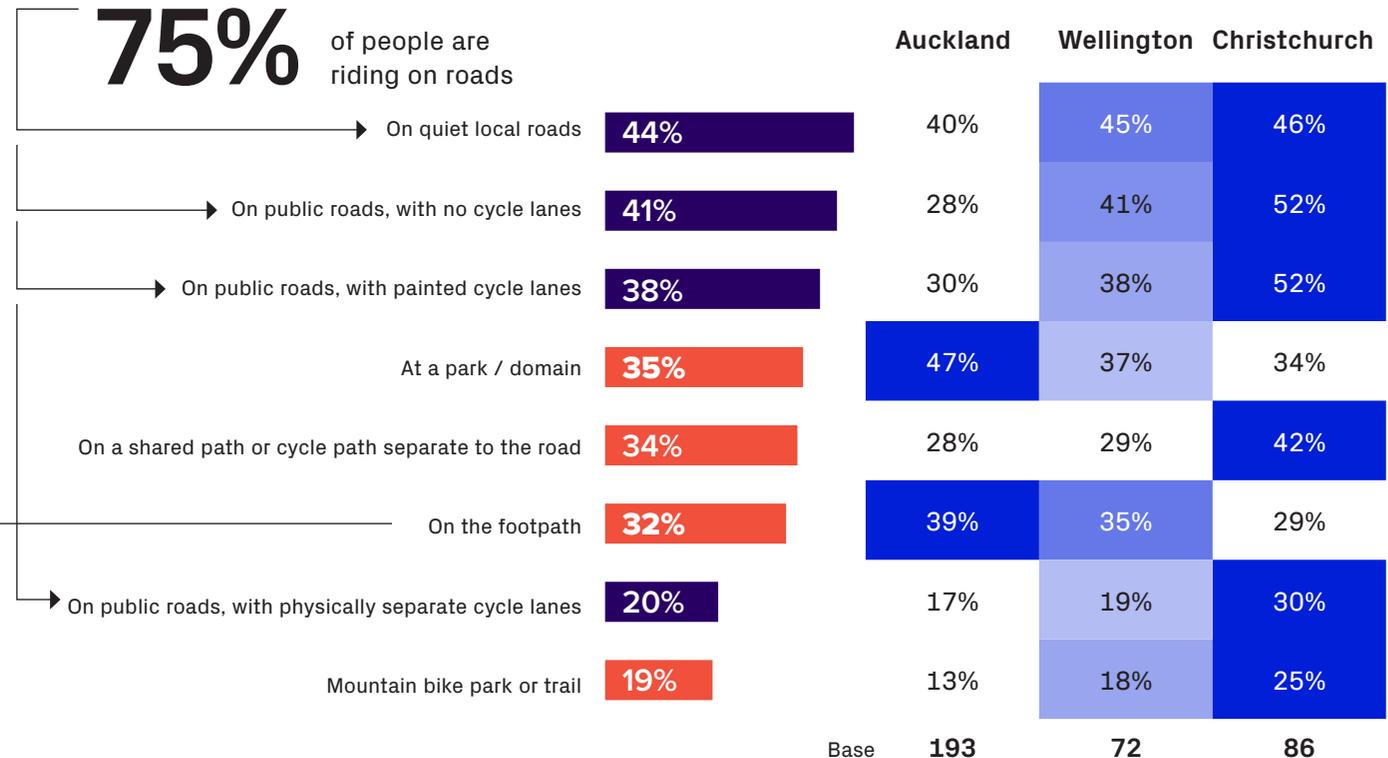
Roads are being used by the majority of cyclists and for many, these are without dedicated cycling infrastructure

MAIN CYCLING OCCASIONS (ALL CYCLISTS , NATIONAL VIEW)

Recreational cycling is the largest occasion in New Zealand (74%) which provides context for the off-road/parks cycling. However, still much of cycling is on the road (75%) where there is no infrastructure.

Auckland has the highest proportion of footpath cycling (39%).

Footpath cycling increases to 41% of families with children under 12 years old.



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

SELF DEFINED CYCLIST TYPE (ALL CYCLISTS)



Group road cyclist



Road cyclist



Faster commuter

Auckland has less leisure cyclists than the rest of New Zealand and more group road cyclists and family group cyclists



Leisure cyclist



Casual cyclist



Regular commuter



Family group



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

Q. Below are some images of cyclists, which of the following would best relate to the type of cyclist you are?
 Q. What occasions do you cycle?
 Base: n=610 (cyclist)

Despite very few cyclists associating themselves as *group, road or fast cyclists* – their frequency and visibility dominates the motorist perceptions

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

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



Cyclists self reported association



Cyclists self reported frequency



Who motorists are seeing on the road²

(On the road once per week or more)

Group road cyclist	1%	47%	38%
Road cyclist	5%	62%	55%
Fast commuter	5%	54%	29%
Regular commuter	9%	69%	38%
Casual cyclist	22%	31%	29%
Leisure cyclist	44%	27%	35%
Family group cyclist	13%	41%	16%

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

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

**IMPLICATION**

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

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

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

Perceptions and behaviour on the road

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

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

FEAR

Causing injury or damage to person or vehicle

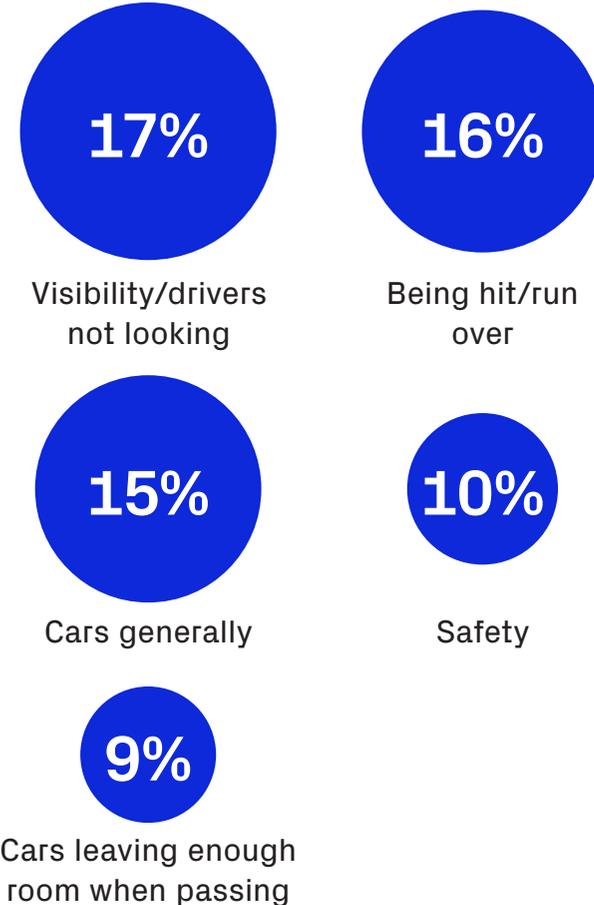
Death

FRUSTRATION & IMPATIENCE

Being late – Going slow to accommodate cyclists

Going slow– Simply not moving forward

TOP 5 CYCLIST CONCERNS WITH BEING ON THE ROAD

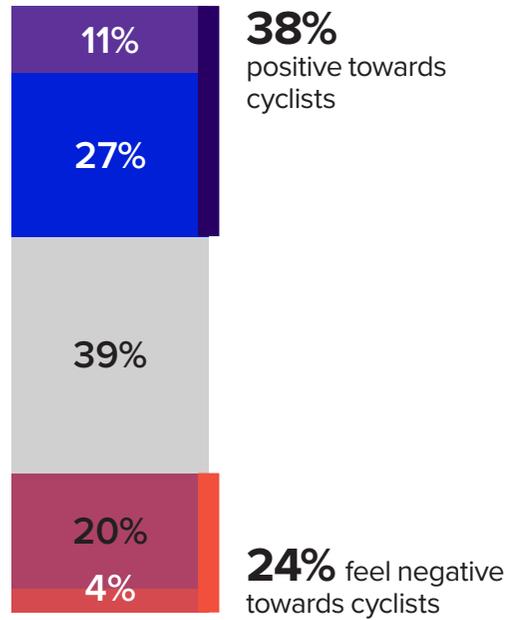


Q. As a cyclist, what are your main concerns when being on the road?
Base: n=610 (cyclist)

Motorists generally feel neutral to positive towards cyclists

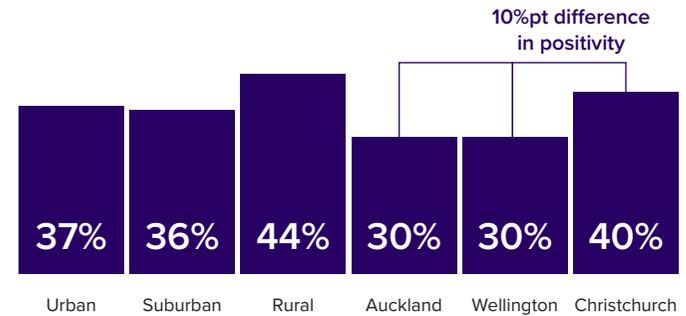
Motorists know of cycling's benefits and find many cyclists relatable and admirable. They are also nostalgic for the good old days when they could cycle freely and safely as children.

Total New Zealand perceptions towards cyclists (all motorists)



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

Regional Positivity



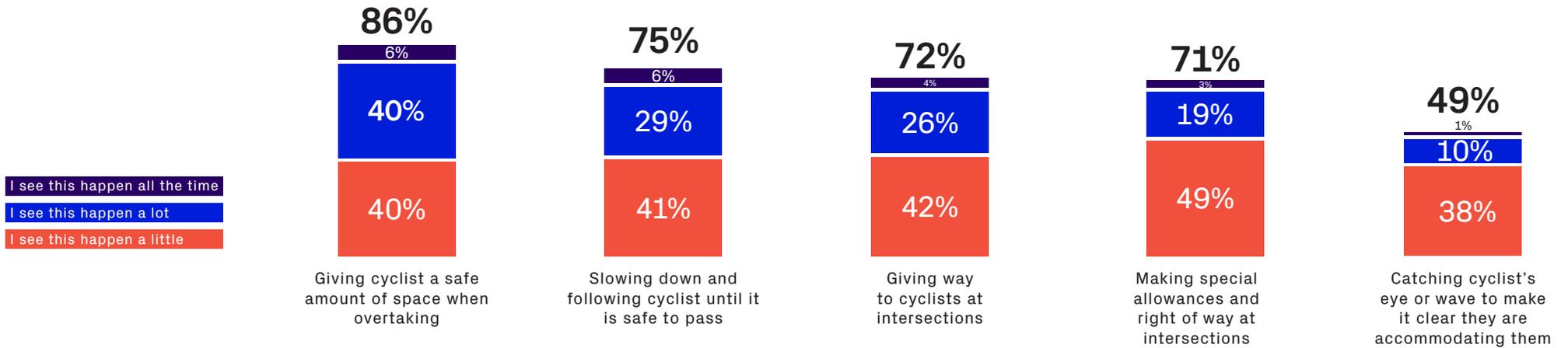
Regional Negativity



There are also some very positive behaviours being observed towards cyclists

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

POSITIVE DRIVER BEHAVIOURS OBSERVED



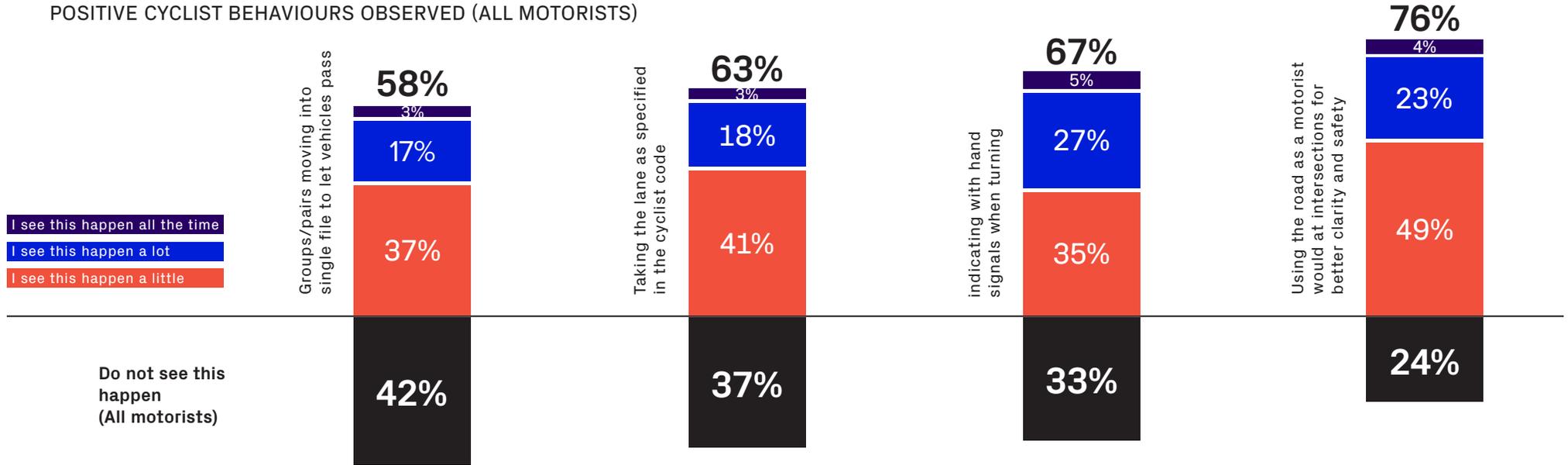
 Cyclists ONLY group (Total see it happen)

Q. How often do you see the following behaviour on the road from motorists?
Base: n=1,507 (motorists), n=610 (cyclists)

And cyclists are also demonstrating positive behaviour although inconsistency exists

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

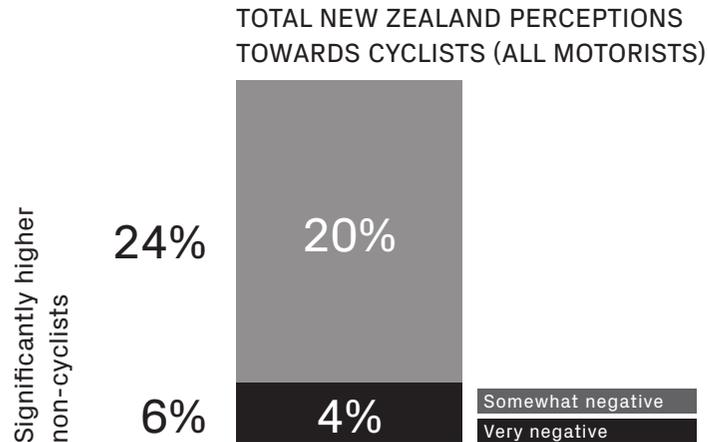
POSITIVE CYCLIST BEHAVIOURS OBSERVED (ALL MOTORISTS)



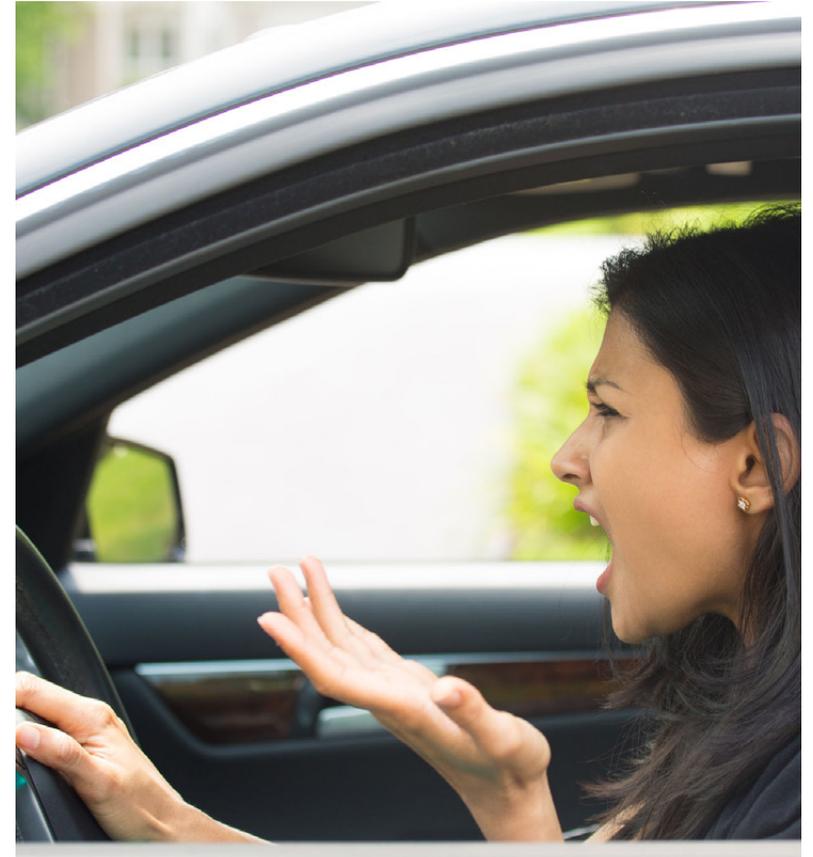
Q. How often do you see the following behaviour on the road from cyclists?
 Base: n=1,507 (motorists), n=610 (cyclists)

This inconsistency is leading to some resentment towards cyclists

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



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



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

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



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

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

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

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

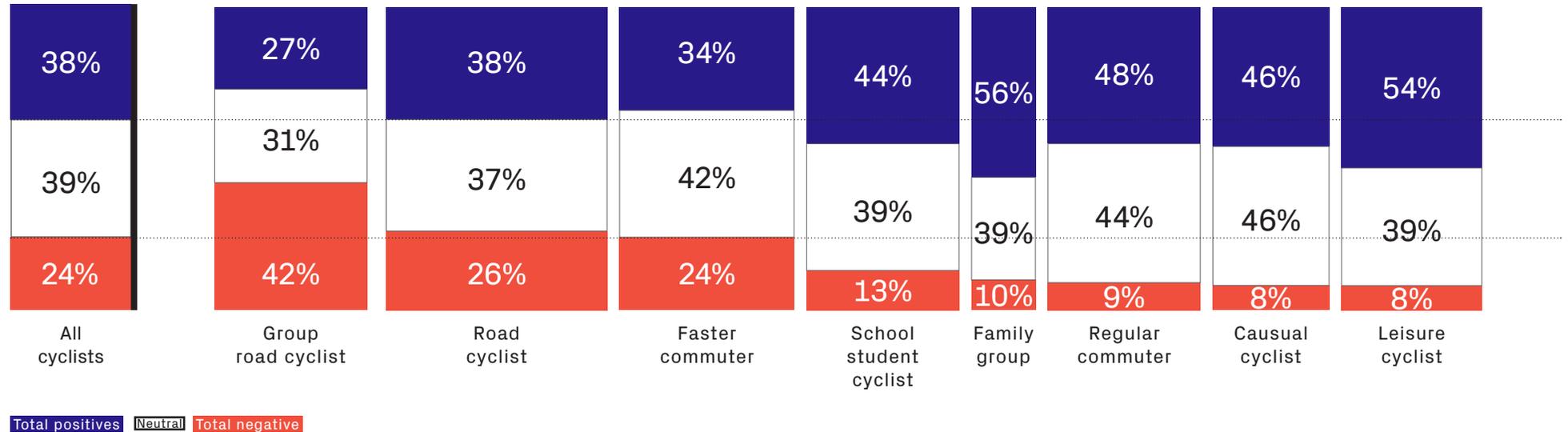
Negativity towards cyclists is driven by the specialist lycra clad cyclist, particularly when they move in “packs”

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

“They’re not considerate, they’ll smack your bonnet.”
 “King of the road.”

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

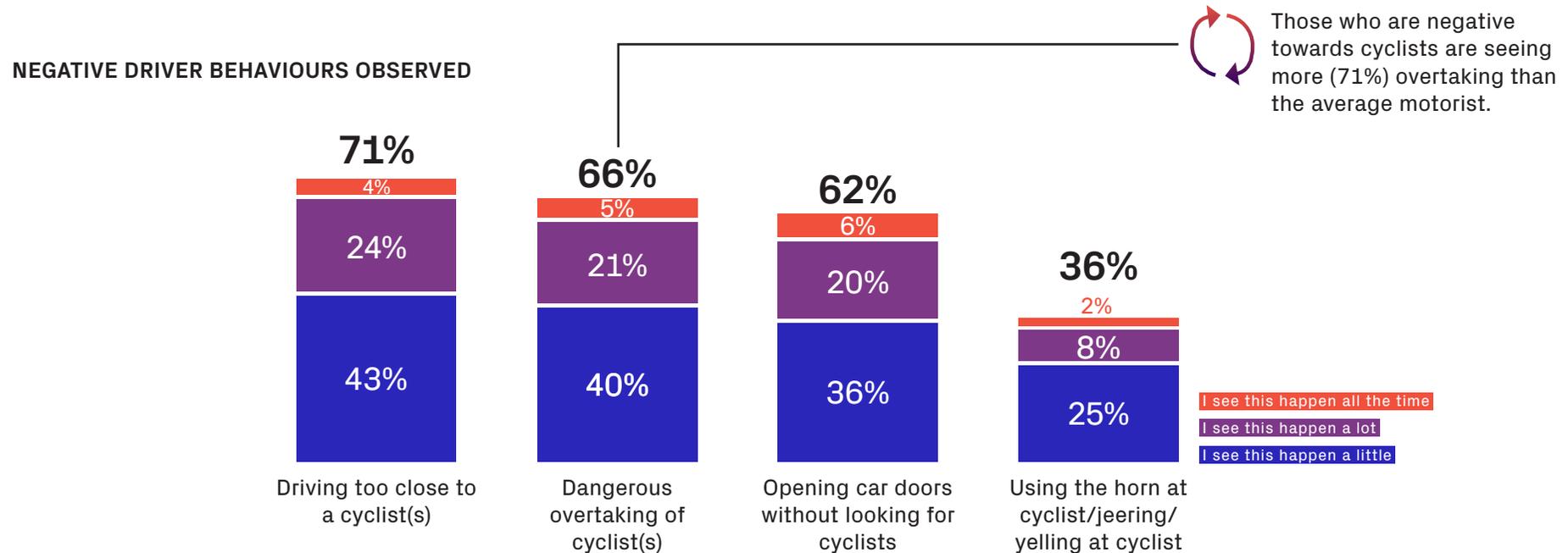
PERCEPTIONS TOWARDS CERTAIN TYPES OF CYCLISTS (ALL MOTORISTS), note: thickness of bars relates to on-road visibility.



Q. On the scale below, please select which best represents how you feel about each of the following cyclists?
 Base: n=1,507 (motorists)

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

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



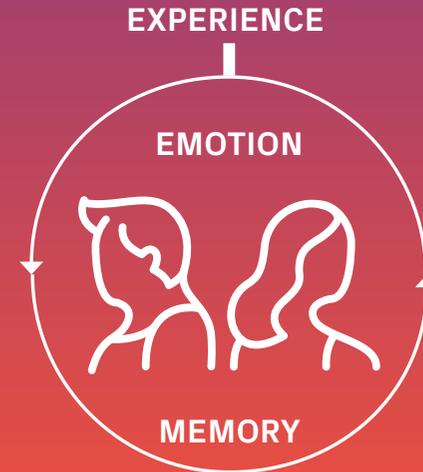
Q. How often do you see the following behaviour on the road from motorists?
 Base: n=1,507 (motorists)

IMPLICATION

Not all cyclists are an outgroup but subset of lycra clad cyclists are driving anti-social behaviour

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

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



IMPLICATION

Humanising road cyclists will be important

The majority of cyclists are on the road currently, and this is unlikely to change dramatically in the coming years. So how do we make this a safe sharing environment?

How do we change perceptions and ultimately influence positive behaviour?





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Changing behaviour

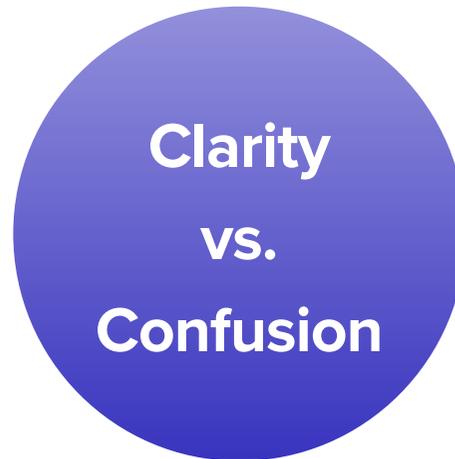
TRA

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

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



NZ road culture is dominated by a driver mindset.



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



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

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

The keys to unlocking change

MINDSET

Change driver mindset

RULES

Establish social norms

EMOTION

Lighten the weight of responsibility



We can't tell people how to feel. But social and cultural norms can influence how they choose to react to their emotions.

Improving cycling infrastructure

ENVIRONMENTAL



TRA

Duty of Care - Emotion

Make us feel better about ourselves

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

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

Driving can very easily become emotional

64%

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

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

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



Share the road
=
Share the responsibility

CLARITY VS. CONFUSION - Rules

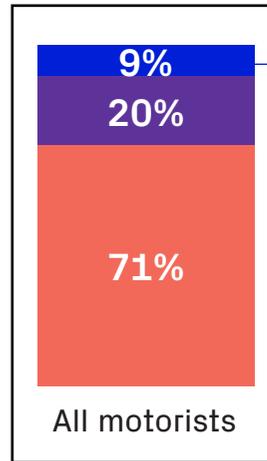
Turn confusion into clarity

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

The key to unlocking clarity is enabling expectation.

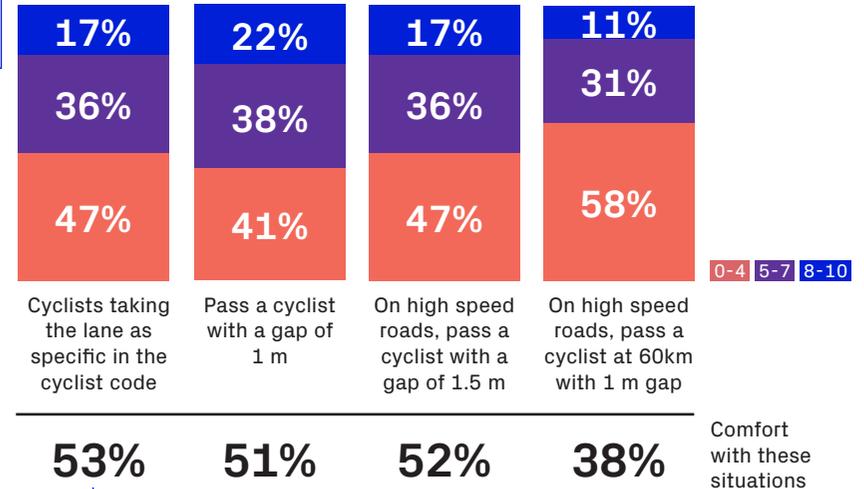
Being able to predict or anticipate behaviour on the road will create mutual trust and respect regardless of situation.

FAMILIARITY WITH THE CYCLING ROAD CODE



37%
of road cyclists familiar with the code.

Familiarity with the situations (All motorists)



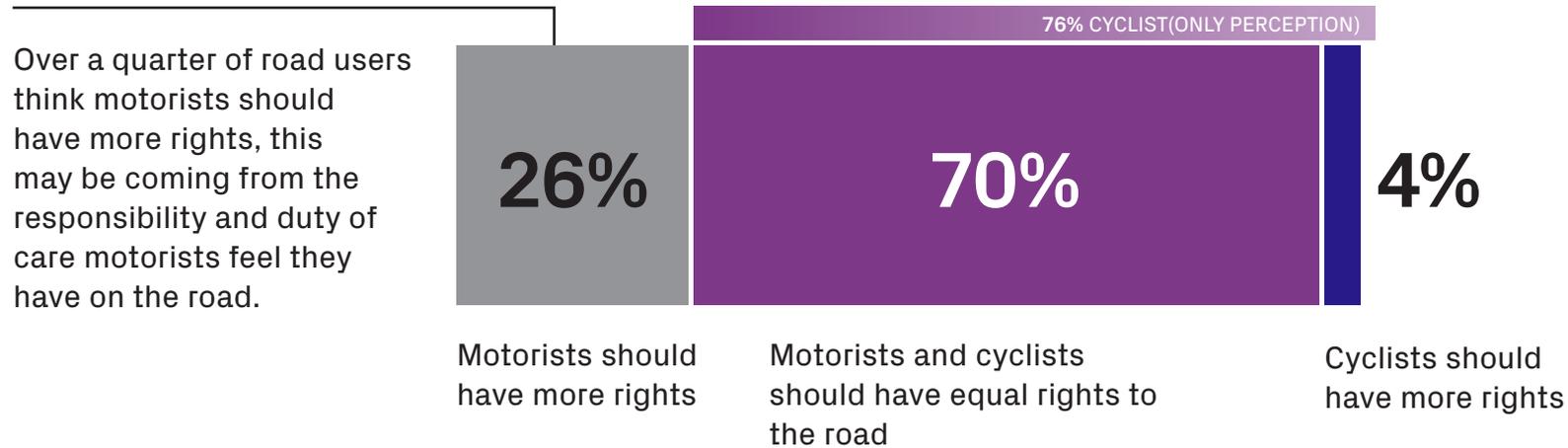
Those who are negative towards cyclists (24%) have significantly less comfort in these situations

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

My Road vs. Our Road - Change the mindset

There is a desire to share the road, but we will need to unify drivers and cyclists to do so effectively

PERCEPTIONS TOWARDS RIGHTS ON THE ROAD (ALL MOTORISTS)



	Motorists should have more rights	Motorists and cyclists should have equal rights to the road	Cyclists should have more rights
Those negative towards cyclists (24%)	58%	40%	2%
Wellington motorists	32%	63%	5%

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

IMPLICATION

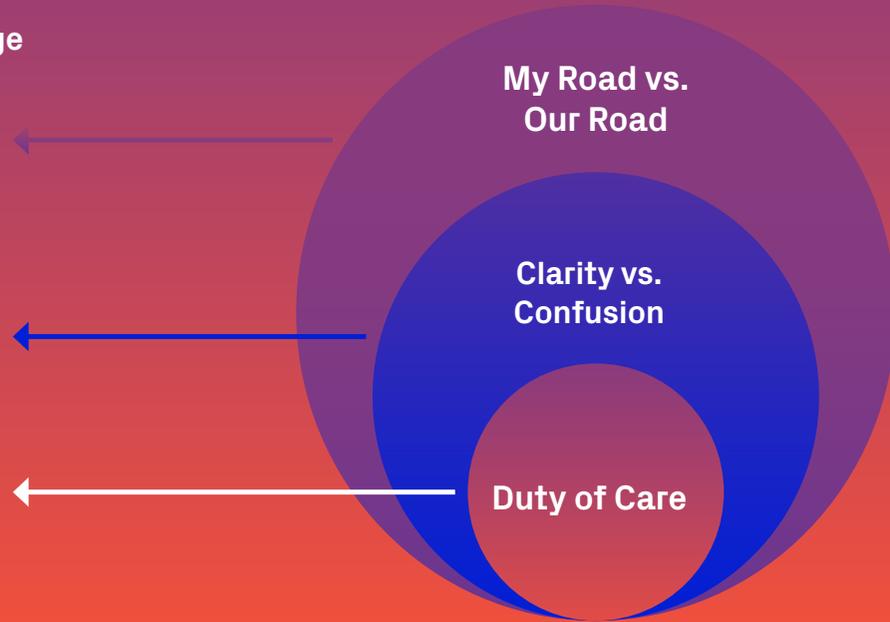
The keys to unlocking change

The keys to unlocking change

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

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

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



Footpath cycling

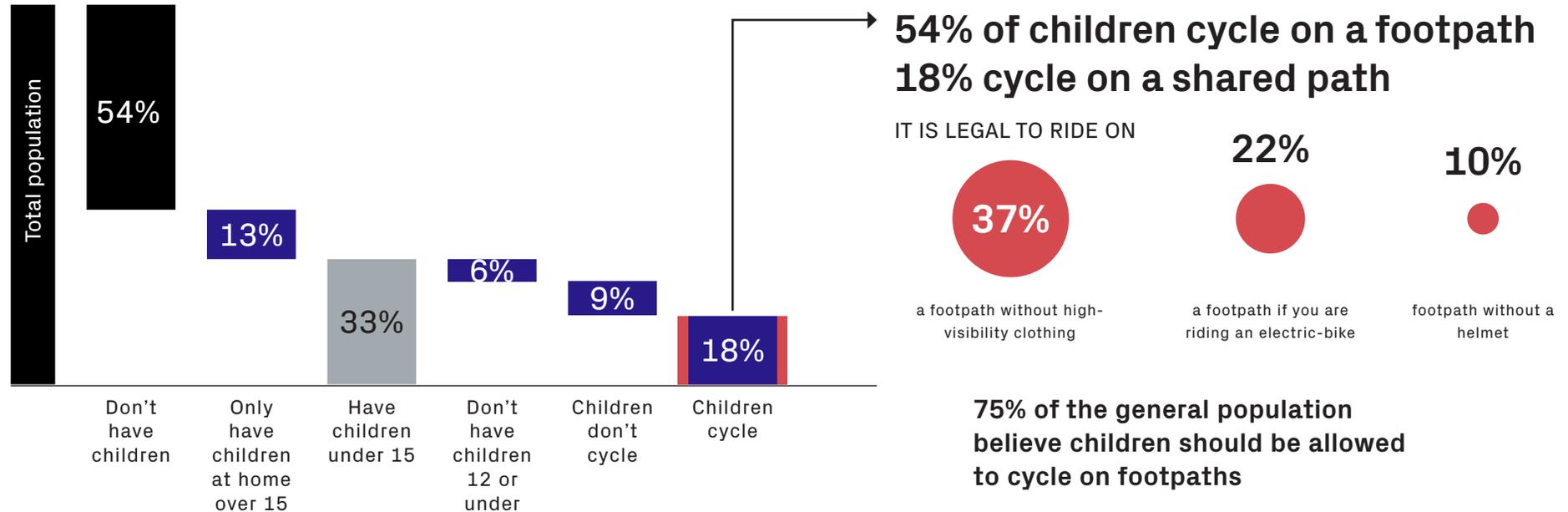
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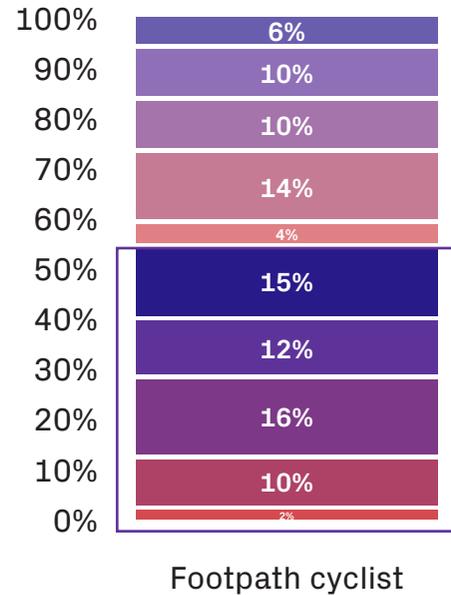
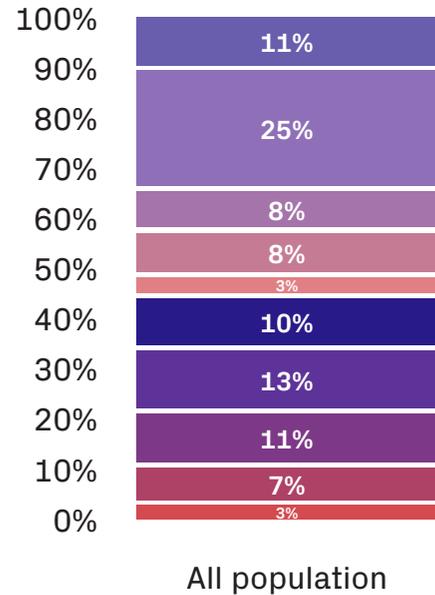
Around 18% of the adult population have children who cycle

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

PROPORTION OF CHILDREN 12 OR UNDER WHO CYCLE



Cyclist who ride on the footpath are more likely to be households with children and ride as a family



The footpath cyclist are more likely to be households that have children and be non regular cyclists.

They also over index in urban areas

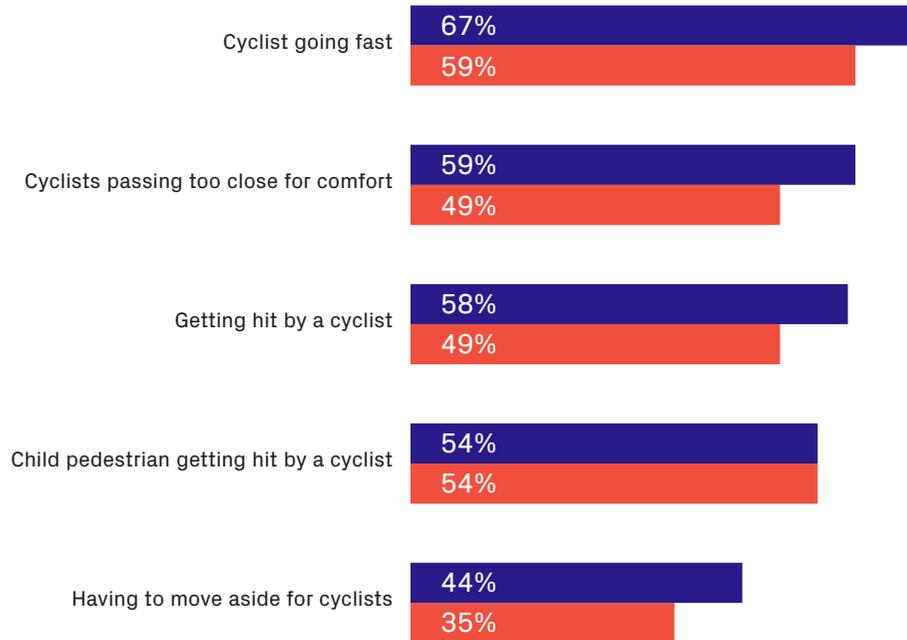
55% of those who cycle on the footpath are families, but a further 45% do not have kids at home.

- Older single, living alone
- Older couples, no kids at home
- Younger couples, no kids
- Group flatting
- Young, single, living alone
- Household with children of mixed ages
- Household with children aged 15 or more
- Household with school aged kids only
- Household with pre-school kids only
- Single Parent

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

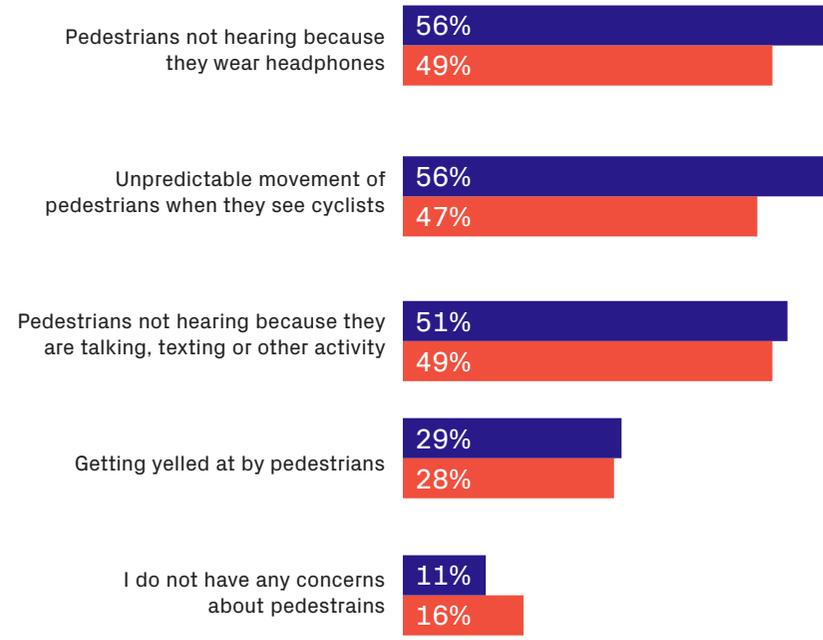
For pedestrians the biggest concerns centre around speed and fear of injury. For cyclists, it also comes down to the unpredictable nature of pedestrians.

CONCERNS AS PEDESTRIANS (TOP 5)



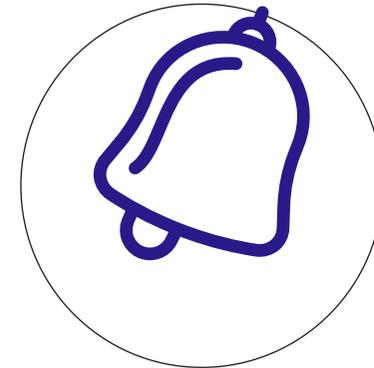
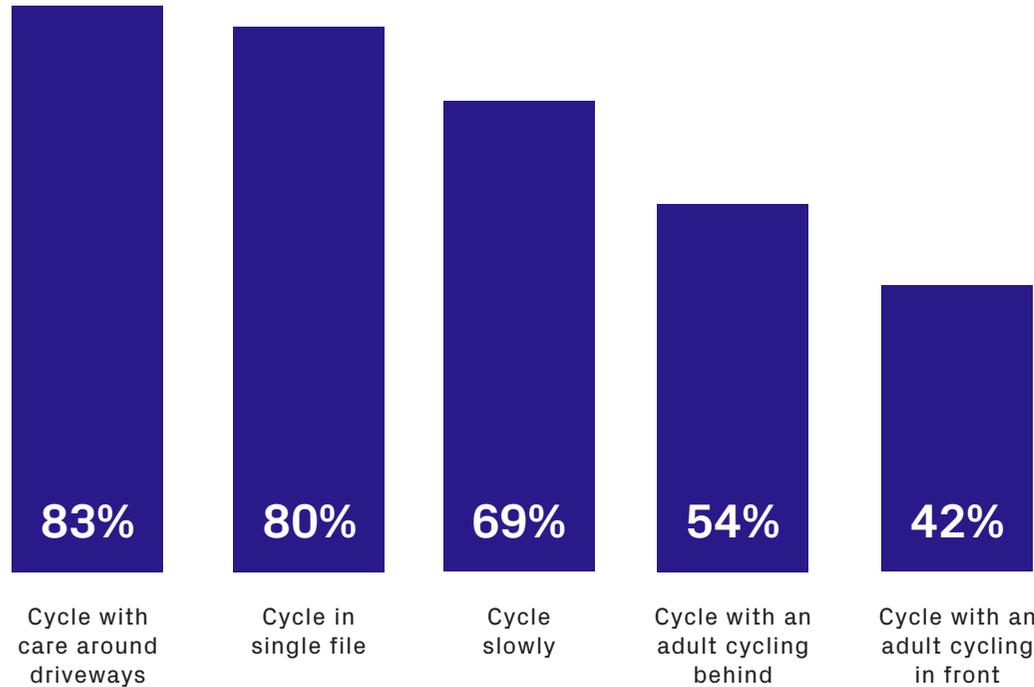
All pedestrians
Families with children who cycle

CONCERNS AS CYCLISTS (TOP 5)



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

PERCEPTIONS OF GOOD BEHAVIOUR FROM ADULTS



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

Lots of dings 20%
Verbal warning 14%

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

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

There is a desire for improved behaviour around footpath cycling.

These centre around four main elements:

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

IMPLICATION



5

Bringing it
all together

TRA

**There are four main
elements that must blend
and inform all programmes**

1. Create a shared purpose

We must promote a friendlier driving culture and a collective relationship between all road (and footpath) users.

2. Normalise cyclists

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

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

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

3. Clarity and expectations

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

4. Reinforce good behaviour

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

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

Let's talk