



Baseline Survey of New Zealanders' Attitudes and Behaviours towards Cycling in Urban Settings

Highlights

- ◆ 67% of urban New Zealanders, 18 years of age or more **own or have access to a bicycle** that is in working order.
- ◆ 56% of urban New Zealanders, 18 years of age or more have **ridden a bicycle in the last 12 months**. 54% of these cyclists are males and 45% are females.
- ◆ 50% of urban New Zealanders, 18 years of age or more have **ridden a bicycle for recreational purposes** in the last 12 months. 53% of these cyclists are males and 46% are females.
- ◆ 29% of urban New Zealanders, 18 years of age or more have **ridden a bicycle in an urban setting** in the last 12 months (i.e. to commute or get around town). 62% of these cyclists are males and 37% are females.
- ◆ 16% of urban New Zealanders, 18 years of age or more are currently cycling on a **regular basis in urban settings** (i.e. every week to commute, to get around town). 67% of these cyclists are males and 31% are females.



Urban cycling

Focusing on urban New Zealanders, 18 years of age or more who are cycling in urban settings, **three distinct groups or segments** are identifiable:

1. **'Urban riders – Committed commuters'** – cyclists in this segment ride a bicycle to get around town and/or to commute to and from work/study on a very regular basis (i.e. four or more times a week). This group represents 8% of all urban New Zealanders, 18 years of age or more.
2. **'Regular urban riders'** – cyclists in this segment ride a bicycle to get around town and/or to commute to and from work/study not as regularly (i.e. one to three times a week). This group also represents 8% of all urban New Zealanders, 18 years of age or more.
3. **'Occasional urban riders'** – cyclists in this segment ride a bicycle to get around town and/or to commute to and from work/study less frequently than once a week. This group represents 13% of all urban New Zealanders, 18 years of age or more.

Many of the urban cyclists who are currently commuting state they are now riding **more frequently** than they did 2-3 years ago (47%). A little over one-third of those who currently use a bicycle to get around town also state they are now doing this more frequently (36%).

Most urban cyclists who are currently commuting and state they are doing this more frequently than they were 2-3 years ago say this is because they want **to be fit** (52%) **and/or because they enjoy cycling** (20%), as well as because **it is cheaper** (27%) and they can **get to where they are going much faster** (16%).

Similar reasons are given by urban cyclists who are currently using a bicycle to get around town and state they are doing this more frequently than they were 2-3 years ago.

In comparison, relatively few urban cyclists who commute state they are riding more frequently because it is safer or because of particular safety initiatives. For example, 3% state they are riding more frequently because there are now painted cycle lanes, 2% because there is now a separate off-road path on which they can cycle, and 2% because there are now physical barriers between motorists and cyclists.

In fact, many of urban cyclists believe cycling in urban settings is currently **unsafe** (36% believe commuting is unsafe and 27% believe cycling to get around town is unsafe).

Furthermore, many also believe cycling in urban settings has become **'less safe'** than it was 2-3 years ago (29 percent).

Despite these opinions about cycling in urban settings, most urban cyclists state it is likely that, in the next 12 months, they will **continue** commuting (64%) and/or cycling to get around town (67%).



This survey was completed as a baseline survey from which to monitor and evaluate changes in cyclists' and non-cyclists' opinions about cycling in urban settings and especially about the safety of doing so. As such, the survey suggests that cycling will increase amongst urban cyclists (i.e. *Urban riders – Committed commuters, Regular urban riders, and Occasional urban riders*) regardless of initiatives designed to improve the safety of cycling such as dedicated cycling lanes and cycle lanes separated from traffic by physical barriers. However, urban riders in general also state that they will cycle more frequently if such initiatives are completed.



Background

The National Cycling Team in the New Zealand Transport Agency is responsible for delivering a programme (the National Cycling Programme) aimed at making urban cycling a safer and more attractive transport choice¹. Its primary focus is on the 16 urban centres in which the Transport Agency is making investments in cycling through the Urban Cycleways Fund, and particularly on Auckland, Wellington and Christchurch.

The international experience suggests that such a programme should have four main elements:

1. Safer urban cycle networks (infrastructure).
2. Community engagement and support.
3. Initiatives to encourage cycling.
4. Attitudinal change, on the part of both cyclists and other road users.

As a significant investment is being made in this programme, the National Cycling Team wishes to ensure its programme is making a difference, including that it is a good return on the dollars invested. This will be the case if, over time:

1. There is a positive change in the attitudes to urban cycling in general.
2. There is a positive change in perceptions of safety of urban cycling.
3. And consequently, there is an increase in the proportion of people who prefer and actually choose to travel by bike.

Given these goals, the National Cycling Team has developed a research programme to track and monitor New Zealanders' attitudes to and perceptions of urban cycling.

¹ By urban cycling (or 'travelling by bike'), it is meant everyday utility cycling on urban networks to shops, school, work, to see friends, to get to sport facilities, and trips for similar purposes.



The baseline survey

This report relates to the first survey of the research programme or the 'baseline survey'. The baseline survey was conducted between 5 May and 26 July 2016, with a nationally-representative sample of urban New Zealanders aged 18 years of age or more.

The survey sample of over n=2,000 respondents was organised so that the results for Auckland², Wellington and Christchurch, as well as the results for the 13 other urban areas as a whole, could be accurately examined within an acceptable margin of error.

As a result, sub-samples of approximately n=500 respondents were interviewed in each of these regions, with the results subject to a maximum margin of error of plus or minus 4.9% (at the 95% confidence level). This means that had we found that 50% of all respondents interviewed in Auckland, for example, held positive views about urban cycling, we could be 95% sure of getting the same result had we interviewed everyone in Auckland, plus or minus 4.9%.

This summary report presents the results for key questions by area and for the following:

1. Current regular urban cyclists and those who cycle less frequently.
2. Other road users (motorists).
3. The wider community.

² Respondents living in Auckland were randomly selected from the normally resident population living in areas in which cycling-related initiatives are being concentrated.



The key conclusions of the baseline survey

1. The ownership of, or access to bicycles is relatively high.

Two-thirds of all urban New Zealanders, 18 years of age or more **own or have access to a bicycle** in working order (67%).

2. Many people ride bicycles.

Table 1 shows that a little over one-half of all urban New Zealanders, 18 years of age or more state they have **ridden a bicycle in the last 12 months** (56%), while 44% have not. It is important to note that this cycling may have been in an urban and/or non-urban setting.

This table also shows that 16% of all urban New Zealanders have used a bicycle to commute in the last 12 months, 24% have used a bicycle to get around town, and 50% have cycled for recreational purposes.

Table 1: Cycling in the last 12 months

	Base =	Total 2108 %
Have ridden a bicycle in the last 12 months		56
Cycled to commute to and from work/study in the last 12 months		16
Cycled to get around town in the last 12 months (i.e. to go to the shops, visit family or friends)		24
Cycled for recreational purposes in the last 12 months (i.e. for a bike ride in an urban or non-urban setting)		50
Have <u>not</u> ridden a bicycle in the last 12 months		44
Own or have access to a bicycle but have not used it in the last 12 months		12
Do not own or have access to a bicycle (and/or has a disability that prevents them from riding a bicycle)		31

The base numbers shown are unweighted counts.
Total may exceed 100% because of multiple responses.

Table 2 describes these cyclists by gender. It shows that most urban cyclists are male, with twice as many males using a bicycle to commute to and from work/study than females. Males are also more likely to use a bicycle to get around town (61 percent of those who use a bicycle to get around town are male, 37 percent are female). However, the proportions of both genders who have used a bicycle for recreational purposes in the last 12 months are more even (53 percent males and 46 percent females).

Table 2: Cycling in the last 12 months by gender

Q7. In the last 12 months, have you used a bicycle?

	Total	Cycled in last 12 months	Commuted	Used a bicycle to get around town	Used a bicycle for recreational purposes
Base =	2108	1,186	334	495	1,070
	%	%	%	%	%
Male	48	54	65	61	53
Female	51	45	33	37	46
Total	100	100	100	100	100

The base numbers shown are unweighted counts.
Total may exceed 100% because of multiple responses.



3. **29 percent of urban New Zealanders, 18 years of age or more can be described as urban cyclists.**

Point 2 above emphasises that 56% of all urban New Zealanders, 18 years of age or more state have ridden a bicycle in the last 12 months. If we take only urban cycling into account (defined on the basis of commuting to and from work/study, and using a bicycle to get around town to go to the shops, visit family or friends), we can say that 29% of all urban New Zealanders, 18 years or more are **urban cyclists**.

4. **Urban cyclists differ in many ways, including the frequency with which they cycle in urban settings.**

Three distinct groups or segments of urban cyclists are identifiable based on the frequency with which they cycle in urban settings:

- a. A segment of **'Urban riders – Committed commuters'**, who are cyclists who ride a bicycle to get around town and/or to commute to and from work/study on a very regular basis (i.e. four or more times a week). This group represents 8% of all urban New Zealanders, 18 years of age or more.
- b. A segment of **'Regular urban riders'**, who are cyclists who ride a bicycle to get around town and/or to commute to and from work/study at least once a week but not every day (i.e. one to three times a week). This group also represents 8% of all urban New Zealanders, 18 years of age or more.
- c. A segment of **'Occasional urban riders'**, who are cyclists who ride a bicycle to get around town and/or to commute to and from work/study less frequently than once a week. This group represents 13% of all urban New Zealanders, 18 years of age or more.

These three segments are shown in the pie chart overleaf, together with four other segments:

- a. A segment of **'Recreational On-road riders'**. This group **only** rides on the road for recreational purposes and it represents 16% of urban New Zealanders, 18 years of age or more.
- b. A segment of **'Recreational Off-road riders'**. This group **only** rides off-road for recreational purposes and it represents 11% of urban New Zealanders, 18 years of age or more.
- c. A segment of people who are **'Supportive non-riders'** in that they have **positive** views about urban cycling. This group represents 23% of urban New Zealanders, 18 years of age or more.³
- d. A segment of people who are **'Less supportive non-riders'** in that they are **unsure** about urban cycling. This group represents 22% of urban New Zealanders, 18 years of age or more.

³ Non-cyclists' views about cycling in urban settings was established based on their level of agreement with the statement, Cycling is a great way to get around town easily and efficiently.



Graph 1: Segmentation of NZ population 18+ based on reported cycling behaviour

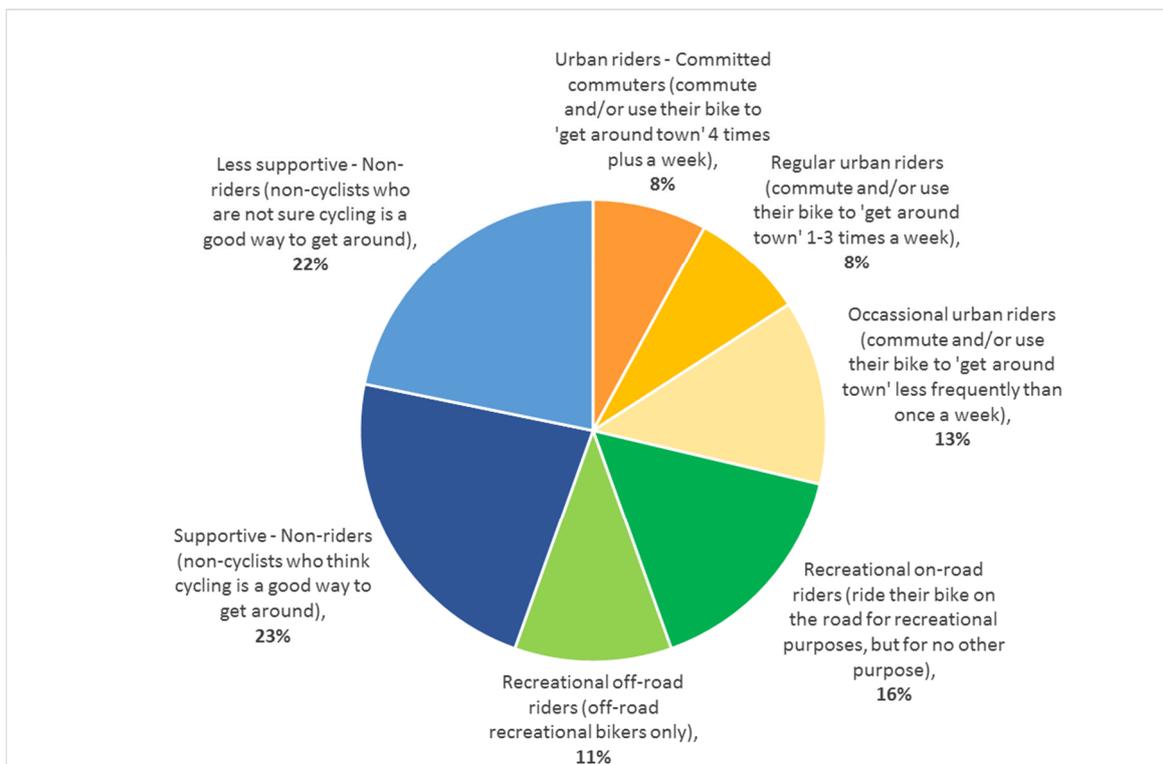


Table 3: Current cycling frequency – urban riders

	All Urban Riders %	Urban riders – Committed commuters %	Regular urban riders %	Occasional urban riders %
Commuting:	n=328*	n=132	n=98	n=98
Most days (4 or more days per week)	41	99	0	0
Every few days (3 days per week)	12	0	39	0
Once or twice a week (1-2 days per week)	14	0	45	0
A few times each month	16	0	12	43
Not very often	17	0	3	56
Not at all	1	0	1	1
Total	100	100	100	100
Get around town:	n=485	n=122	n=141	n=222
Most days (4 or more days per week)	11	44	0	0
Every few days (3 days per week)	9	13	22	0
Once or twice a week (1-2 days per week)	20	23	52	0
A few times each month	31	14	19	47
Not very often	28	6	7	52
Not at all	1	1	1	1
Total	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on the three urban cycling segments.

* Based on respondents who use a bicycle to commute to work/study.



5. All ages and both genders are represented amongst urban riders.

Table 4 shows that the profile of All Urban Riders is significantly different from that of all urban New Zealanders, 18 years of age or more in terms of gender and age.

Almost two-thirds of All Urban Riders are male (62%) and they have a younger age profile. Well over one-half are under 45 years of age (58%) compared with 51% for all urban New Zealanders, 18 years of age or more.

This table also shows that the gender and age profile of each of the three urban cycling segments also differ by gender and age. For example, *Urban riders – Committed commuters* are predominantly male (73%) compared with *Occasional urban riders* (56%), and they also have a younger age profile (66% are under 45 years of age compared with 57% of with *Occasional urban riders*).

Table 4: Demographic profile of urban riders

	Total	All Urban Riders	Urban riders – Committed commuters	Regular urban riders	Occasional urban riders
Base =	2108	581	156	163	262
	%	%	%	%	%
Gender:					
Male	48	62	73	61	56
Female	51	37	25	37	43
Total	100	100	100	100	100
Age:					
18-24	13	17	15	15	19
25-34	22	22	27	22	20
35-44	16	19	24	15	18
45-54	17	19	17	21	19
55-64	14	11	11	12	11
65-74	17	12	6	15	13
75 years and over	0	0	0	0	0
Total	100	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on all respondents, while the second column is based on the three urban cycling segments.

6. Urban cycling is recognised as becoming a more popular form of urban transportation.

Over one-half of all New Zealanders 18 years of age or more (59%) and almost three-quarters of All Urban Riders (72%) agree that 'it is becoming more popular for people to use a bicycle to get to work, study or to the shops'. This opinion is also shared by non-riders (54%) (Table 5 overleaf).

The popularity of urban cycling is also reflected in the level of agreement with the idea that 'cycling is a great way to get around town easily and efficiently' (61% of all New Zealanders, compared with 91% of All Urban Riders and 53% of non-riders).



Table 5: Attitudes to urban cycling

Q10. Now thinking generally about cycling, how much do you agree or disagree with the following statements?

	Total	Urban riders – Committed commuters	Regular urban riders	Occasional urban riders	Recreational on-road riders	Recreational off-road riders	Supportive non- riders	Less supportive non-riders
Base =	2108	156	163	262	350	233	484	460
	%	%	%	%	%	%	%	%
It is becoming very popular for people to use a bicycle to get to work, study or to the shops								
Agree	59	74	79	66	60	61	66	36
Neither agree nor disagree	21	15	11	16	21	19	22	30
Disagree	14	7	8	12	15	16	8	26
Don't know/NA	6	5	2	6	5	4	6	8
Total	100	100	100	100	100	100	100	100
Cycling is a great way to get around town easily and efficiently								
Agree	61	91	84	72	60	51	100	0
Neither agree nor disagree	20	3	8	17	21	23	0	50
Disagree	17	4	6	11	16	24	0	46
Don't know/NA	1	1	1	0	3	1	0	4
Total	100	100	100	100	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on all respondents.



7. Against this background, urban cyclists in general state they are using their bicycles more frequently in urban settings than they were 2-3 years ago.

For example, 50% of *Urban riders- Committed commuters* who currently commute state they are commuting ‘more often’ than they were 2-3 years ago (compared with 7% who state they are doing so ‘less often’) (Table 6).

Similarly, 44% of *Regular urban riders* who currently commute state they are doing this ‘more often’ than they were 2-3 years ago (compared with 25% who state they are doing so ‘less often’).

These two groups of urban riders are also more likely to state they are using their bicycles ‘more often’ to get around town.

However, *Occasional urban riders* are as just as likely to state that they are urban cycling ‘more often’ than they were 2-3 years ago, as they are to report that they are now urban cycling ‘less often’.

Table 6: Cycling less or more frequently than 2-3 years ago –urban riders

	All Urban Riders %	Urban riders – Committed commuters %	Regular urban riders %	Occasional urban riders %
Commuting:	n=262*	n=131	n=92	n=39
Less often	18	7	25	38
About the same	35	43	30	21
More often	47	50	44	41
Not applicable	0	0	1	0
Total	100	100	100	100
Get around town:	n=347*	n=112	n=128	n=107
Less often	14	5	13	25
About the same	49	53	48	47
More often	36	41	39	28
Not applicable	0	0	0	0
Don't know	1	2	0	0
Total	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on the three urban cycling segments.

* Based on respondents who use a bicycle to commute to work/study or to get around town at least a few times each month.



8. Relatively few weekly riders who report using their bicycles more frequently in urban settings say they do so because of safety developments.

Most frequently, urban riders who are using a bicycle to commute and/or to get around town, state they are doing this more often than they were 2-3 years ago because they wish to become fit (52%), it is cheaper (than alternative forms of transportation) (27%), they enjoy cycling (20%), and they can get to where they are going much quicker (16%) (Table 7).

In comparison, few state that it is because there are more off-road cycling paths separating cyclists from motorists (6%), more painted cycle lanes (3%), more physical barriers between cyclists and motorists (2%), or there has been a change in motorists' behaviour (0%).

However, it should be noted that some urban riders who state they are using a bicycle less frequently report doing so for personal safety reasons; that is, they feel vulnerable as riders (21%), the negative attitudes of drivers (13%) and the lack of or poor cycling infrastructure (6%).

Table 7: Reasons for riding more often –urban riders

Q14. What is the main reason you are now cycling more often...?

	All Urban Riders	Urban riders – Committed commuters	Regular urban riders	Occasional urban riders
Base =	216*	81	85	50
	%	%	%	%
For fitness	52	43	53	63
Cheaper (reduced petrol/parking/public transport costs)	27	38	24	14
I enjoy cycling	20	15	32	11
I can get there faster by bicycle	16	27	8	8
Environmental benefits	10	10	11	11
It's something I can do with my children	8	1	9	20
Change of address/workplace means distance/time won't be a prohibiting factor anymore	9	12	4	9
Lifestyle change/I have more time	5	1	9	5
More convenient than driving/public transport	7	9	6	6
Separate off-road paths make it safer to cycle	6	8	4	7
Easier parking	6	6	5	10
Purchased a better bike	5	4	3	7
Too much traffic to drive	5	3	9	1
I have the opportunity to cycle with other people	3	2	4	3
Painted cycle lanes make it safer to cycle	3	4	1	6
There are now physical barriers between motorists and cyclists which makes it safer to cycle	2	1	3	4
There is now less traffic on the roads which makes me feel more confident cycling	2	3	1	0
Improved storage facilities (e.g. bike racks, lockers)	2	0	5	2
Increased confidence	0	1	0	0
Change in driver behaviour (e.g. more courteous, more aware of cyclists)	0	0	0	2
Other	16	21	15	9
No particular reason	1	0	3	0

The base numbers shown are unweighted counts.

Total may exceed 100% because of multiple responses.

Note: The first column is based on the three urban cycling segments, and those respondents who are cycling more frequently.



9. Urban riders in general have different opinions about how safe it is to cycle in urban settings.

Although many urban riders are cycling more frequently than they were 2-3 years ago, many believe it is currently unsafe to do so. This is particularly in relation to cycling for commuting purposes (Table 8).

For example, 28% of *Regular urban riders* believe it is currently 'unsafe' to commute, whereas 40% believe it is 'safe' to do so.

Urban riders – Committed commuters are more concerned and polarised, with 35% believing it is currently 'unsafe' to commute and 40% believing it is 'safe' to do so.

Occasional urban riders are also similarly polarised, with 42% believing it is 'unsafe' and 35% believing it is 'safe' to do so.

Urban riders are relatively less concerned about the safety of cycling to get around town, although there is still a significant proportion who believe it is 'unsafe' to do so (27%).

Table 8: Perceptions of current safety –urban riders

	All Urban Riders %	Urban riders – Committed commuters %	Regular urban riders %	Occasional urban riders %
Commuting:	n=466*	n=135	n=127	n=204
Very unsafe	11	7	5	18
Unsafe	25	28	23	24
Neither safe nor unsafe	24	23	30	20
Safe	32	35	31	30
Very safe	6	5	9	5
Don't know	1	1	1	0
Total	100	100	100	100
Get around town:	n=581	n=156	n=163	n=262
Very unsafe	5	8	1	5
Unsafe	22	26	21	21
Neither safe nor unsafe	32	24	41	32
Safe	32	32	30	32
Very safe	6	6	4	8
Don't know	2	4	3	1
Total	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on the three urban cycling segments.

* Based on respondents who use a bicycle to commute to work/study.



10. Compared to the situation 2-3 years ago, more urban riders believe it has become 'less safe' than believe it is 'more safe' to cycle in urban settings.

Against the background of urban riders' opinions about the current safety of cycling in urban settings, these cyclists generally believe it has become 'less safe' than it was 2-3 years ago (29% believe it has become 'less safe' compared with 25% who believe it has become 'more safe') (Table 9).

This is particularly the case for *Regular urban riders* (34% believe it has become 'less safe') and *Occasional urban riders* (32% believe it has become 'less safe'). In comparison, *Urban riders – Committed commuters* are less likely to feel it has become less safe (22%).

Table 9: Cycling safety compared with 2-3 years ago –urban riders

	All Urban Riders n=581 %	Urban riders – Committed commuters n=156 %	Regular urban riders n=163 %	Occasional urban riders n=262 %
More safe	25	24	30	23
No change	33	37	27	34
Less safe	29	22	34	32
Don't know	12	17	8	12
Total	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on the three urban cycling segments.



11. Despite current opinions about the safety of cycling in urban settings, most urban riders in general state they are likely to continue to cycle in urban settings in the next 12 months.

This is particularly the case for *Urban riders – Committed commuters* and *Regular urban riders*, compared with *Occasional urban riders*, and especially in terms of cycling for commuting purposes (Table 10).

Whereas 95% of *Urban riders – Committed commuters* and 75% of *Regular urban riders* who currently commute for work or study state it is likely they will continue to cycle for commuting purposes in the next 12 months, fewer *Occasional urban riders* who currently commute state this will be the case (36%).

However, just over one-half of *Occasional urban riders* who currently use a bicycle to get around town state they will continue to do so (55%).

Table 10: Likelihood of cycling in the next 12 months –urban riders

	All Urban Riders	Urban riders – Committed commuters	Regular urban riders	Occasional urban riders
	%	%	%	%
Commuting:	n=467*	n=135	n=127	n=205
Very unlikely	14	2	9	26
Unlikely	13	3	4	26
Neutral	8	1	11	10
Likely	19	5	27	22
Very likely	45	90	48	14
Don't know	1	0	1	1
Total	100	100	100	100
Get around town:	n=581	n=156	n=163	n=262
Very unlikely	3	1	2	5
Unlikely	13	10	8	17
Neutral	16	9	15	21
Likely	29	21	30	33
Very likely	38	59	44	22
Don't know	0	0	0	1
Total	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on the three urban cycling segments.

* Based on respondents who use a bicycle to commute to work/study.



12. Safety concerns are one of the key drivers of non-cycle use.

Table 11 shows that together with some practical factors, concern about safety is one of the main drivers accounting for the fact that some current urban cyclists will not be cycling in the next 12 months (21%), along with a belief about the convenience of using other forms of transportation (31%) and concerns with distance (27%).

Table 11: Reasons for unlikely to ride in future –urban riders

Q16. You said that you would be very unlikely or unlikely to cycle to ... in the next 12 months, what are the reasons for this?

	All Urban Riders	Urban riders – Committed commuters	Regular urban riders	Occasional urban riders
Base =	232*	29**	52	151
	%	%	%	%
More convenient to use other mode of transport/carpooling/too much stuff to carry	31	55	42	23
It's too far	27	20	25	29
Personal safety concerns (e.g. vulnerability/ lack of confidence)	21	15	21	22
Lack of/poor cycle facilities (e.g. separate lanes, paths)	18	26	20	15
Terrain (too hilly)	9	6	1	12
Now doing other sports/prefer walking	9	3	3	12
Weather conditions / too dark / finish work at night	8	12	9	6
Negative attitude of drivers towards cyclists	6	4	14	4
Lack of storage / concerns about theft	7	7	6	8
Takes too long (too busy, not enough time)	7	2	7	8
Need to transport children	6	14	2	6
Too much traffic	6	10	8	5
Condition of roads	6	2	6	7
Need car for work	5	0	8	6
Too much effort/can't be bothered/don't like wearing a helmet	4	4	0	6
Lack of personal facilities (showers, not wanting to get sweaty for work, not wanting to take extra clothes)	4	0	0	7
Work/Study from home	1	0	3	1
Age (too old)	1	0	0	1

The base numbers shown are unweighted counts.

Total may exceed 100% because of multiple responses.

Note: The first column is based on the three urban cycling segments, who state it is unlikely they will be cycling in the next 12 months in urban settings.

*Sub-sample based on respondents who have used a bicycle at least weekly, and stated they were unlikely to be riding in 12 months' time.

**Caution: low base number of respondents - results are indicative only.



13. Initiatives aimed at improving the safety of cyclists would be the most influential in encouraging cycle use in urban settings.

Urban riders were presented with a range of initiatives aimed at encouraging cycle use in urban settings. The initiatives that cyclists felt would be most effective in encouraging them to cycle in an urban setting more often, were if drivers were more considerate of cyclists (77%), or if there were more physical barriers separating cyclists from motorists (74%) and painted cycle lanes (70%) (Table 12).

Note that *Urban riders – Committed commuters* were the most likely to state that these initiatives would encourage them to cycle more frequently.

Table 12: Most effective cycling initiatives to encourage urban cycling –urban riders

Q17. Would you be encouraged to cycle more often to get around town ...?

	All Urban Riders	Urban riders – Committed commuters	Regular urban riders	Occasional urban riders
Base =	581	156	163	262
	%	%	%	%
If drivers were more considerate of cyclists	77	86	77	71
If there were more cycle lanes with a physical barrier separating cyclists from other traffic	74	80	73	71
If there were more painted cycle lanes on the road	70	79	71	64
If traffic got so bad it would be faster to cycle	65	74	68	59
If you could take a bike on a bus or train at any time	54	53	54	54
If the roads were in better condition	51	56	50	48
If your friends/family started cycling more	49	51	47	49
If you lived closer to work/study	46	41	47	48
If you had access to publicly available bikes on-demand (without having to own or store them)	32	28	37	32

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on the three urban cycling segments.



14. The greatest opportunities with urban ‘non-riders’ are to encourage them to ride bicycles for recreational purposes on the road.

Earlier in this summary report we noted that 45% of New Zealanders, 18 years of age or more can be described as true ‘non-riders’ in that they have not cycled in the last 12 months in either an urban or non-urban setting. One-half of these people believe that ‘cycling is a great way to get around town easily and efficiently’ (23%) and the other half are not sure about this (22%).

In addition to these two segments, a further 16% are *Recreational on-road riders* and 11% are *Recreational off-road riders* (i.e. cyclists who prefer to cycle in non-urban settings).

Therefore, in total, 72% can be described as urban ‘non-riders’.

There is a tendency for these four segments to have a greater proportion of females and people who are 55 years of age or more. For example, 61% of non-riders who are unsure whether cycling is a good way to get around (i.e. are unsupportive) are female compared with 25% of *Urban riders – Committed commuters*, and 38% are 55 years of age or more compared with 17% of *Urban riders – Committed commuters*.

There is little evidence to suggest that their current cycling behaviour is significantly different to what they were doing 2-3 years ago. Furthermore, when asked about what they might do in the next 12 months, the large majority state that it is unlikely they will ride a bicycle in an urban setting.

For example, while 79% of *Recreational on-road riders* state they are likely to continue to cycle recreationally on the road, only 9% say they are likely to use a bicycle to commute, with 83% categorically saying it is unlikely. Similarly, 83% of *Recreational off-road riders* state it is unlikely that in the next 12 months they will use a bicycle to commute, although 48% say it is likely they will cycle recreationally on the road (Table 13 overleaf).

These results suggest that if there is an opportunity to encourage urban non-riders to ride bicycles, it lies in encouraging them to cycle for recreational purposes on the road. This in turn, may improve their riding skills, increase their confidence and enthusiasm for cycling and make them more inclined to progress to cycling in an urban setting. This includes ‘non-cyclists who think cycling is a good way to get around (i.e. are supportive), with 18% stating that in the next 12 months it is likely they will use a bicycle for on-road recreational purposes.



Table 13: Likelihood of cycling in the next 12 months – urban non-riders

	All Urban Non-riders %	Recreational on-road riders %	Recreational off-road riders %	Supportive non-riders %	Less supportive non-riders %
Commuting:	n=998*	n=257	n=180	n=266	n=295
Very unlikely	63	49	53	62	83
Unlikely	25	34	30	26	12
Neutral	5	5	8	7	2
Likely	4	8	6	3	1
Very likely	1	1	1	1	0
Don't know	1	2	2	1	1
Total	100	100	100	100	100
Get around town:	n=1400	n=350	n=233	n=406	n=411
Very unlikely	49	25	34	51	76
Unlikely	27	30	35	30	18
Neutral	10	14	13	12	3
Likely	10	25	14	4	2
Very likely	2	4	2	0	1
Don't know	1	1	1	2	1
Total	100	100	100	100	100
Recreational (on-road):	n=1400	n=350	n=233	n=406	n=411
Very unlikely	35	3	21	41	62
Unlikely	17	3	22	23	19
Neutral	13	13	10	16	10
Likely	21	43	26	15	7
Very likely	13	36	22	3	1
Don't know	1	1	0	2	1
Total	100	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on the four non-urban cycling segments.

*The commuting question was only asked of respondents who currently work (outside of the home) or study.



15. Concerns about personal safety are one of the key reasons why urban non-riders don't ride.

Table 14 summarises the main reasons why urban non-riders state they are unlikely to be riding bicycles in urban settings in the next 12 months. This shows that they are concerned about safety (22%) and the distance they need to travel (21%) and believe other forms of transportation are more convenient (21%). Note that these are similar reasons provided by current urban riders who reported being unlikely to ride in the next 12 months.

Table 14: Reasons for unlikely to ride in future – urban non-riders

Q16. You said that you would be very unlikely or unlikely to cycle to ... in the next 12 months, what are the reasons for this?

	All Urban Non-riders	Recreation al on-road riders	Recreation al off-road riders	Supportive non-riders	Less supportive non-riders
Base =	1153*	272	192	337	352
	%	%	%	%	%
Personal safety concerns (e.g. vulnerability/ lack of confidence)	22	18	21	23	26
More convenient to use other mode of transport/carpooling/too much stuff to carry	21	25	24	21	17
It's too far	21	25	25	18	18
Now doing other sports/prefer walking	11	9	8	12	12
Terrain (too hilly)	10	10	10	9	13
Too much traffic	8	8	11	7	9
Takes too long (too busy, not enough time)	8	9	12	7	7
Lack of/poor cycle facilities (e.g. separate lanes, paths)	8	9	8	5	9
Negative attitude of drivers towards cyclists	6	3	6	9	4
Weather conditions/too dark/finish work at night	7	11	3	6	7
Need to transport children	7	9	12	6	5
Condition of roads	5	4	4	4	6
Injury/poor health	3	0	1	5	6
Age (too old)	3	0	2	6	4
Too much effort/can't be bothered/don't like wearing a helmet	4	6	3	5	3
Lack of personal facilities (showers, not wanting to get sweaty for work, not wanting to take extra clothes)	5	8	4	4	5
Need car for work	5	6	10	3	3
Lack of storage / concerns about theft	3	5	2	2	2
Work/study from home	0	0	0	1	1
Current bike not reliable	0	1	0	0	1

The base numbers shown are unweighted counts.

Total may exceed 100% because of multiple responses.

Note: The first column is based on the four non-urban cycling segments and respondents who state they are unlikely to cycle in urban settings in the next 12 months.



16. Reflecting their concerns about safety is the fact that most urban non-riders believe it is unsafe to ride a bicycle in an urban setting, and it has become less safe to do so than 2-3 years ago.

Over one-half of urban non-riders believe it is currently 'unsafe' to commute on a bicycle (59%) and to use a bicycle to get around town (51%) (Table 15). With the exception of recreational on-road use, less than 25% believe it is 'safe' to cycle, with most other non-urban riders saying it is neither safe nor unsafe.

Of particular note is the fact that non-riders who are unsure about whether cycling is a great way to get around town easily and efficiently, are more likely to believe that it is currently 'unsafe' to ride a bicycle in urban settings.

Table 15: Perceptions of current safety – urban non-riders

	All Urban Non-riders %	Recreational on-road riders %	Recreational off-road riders %	Supportive non-riders %	Less supportive non-riders %
Commuting:	n=997*	n=257	n=180	n=265	n=295
Very unsafe	28	19	25	25	40
Unsafe	31	39	38	24	27
Neither safe nor unsafe	19	18	15	25	17
Safe	15	16	18	18	9
Very safe	2	3	3	3	1
Don't know	4	4	1	4	5
Total	100	100	100	100	100
Get around town:	n=1400	n=350	n=233	n=406	n=411
Very unsafe	19	8	15	20	30
Unsafe	32	31	37	30	32
Neither safe nor unsafe	25	26	24	27	23
Safe	19	28	22	19	10
Very safe	3	5	1	3	1
Don't know	2	2	1	1	4
Total	100	100	100	100	100
Recreational (on-road):	n=1400	n=350	n=233	n=406	n=411
Very unsafe	16	3	13	16	26
Unsafe	29	19	32	28	35
Neither safe nor unsafe	27	26	28	30	23
Safe	23	41	24	19	10
Very safe	4	9	2	5	2
Don't know	2	1	1	2	4
Total	100	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on the four non-urban cycling segments and respondents who state they are unlikely to cycle in urban settings in the next 12 months.

*The commuting question was only asked of respondents who currently work (outside of the home) or study.



In addition, Table 16 shows that almost twice as many urban non-riders believe it is currently 'less safe' to ride a bicycle in an urban setting than it was 2-3 years ago as believe it is 'more safe' (37% and 19% respectively). Many also simply don't know (17%).

Table 16: Cycling safety compared with 2-3 years ago – urban non-riders

	All Urban Non-riders	Recreational on-road riders	Recreational off-road riders	Supportive non-riders	Less supportive non-riders
Base =	1400	350	233	406	411
	%	%	%	%	%
More safe	19	23	22	19	14
No change	27	29	28	25	27
Less safe	37	36	35	40	35
Don't know	17	12	15	16	24
Total	100	100	100	100	100

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on the four non-urban cycling segments and respondents who state they are unlikely to cycle in urban settings in the next 12 months.

17. Given the concerns about safety, safety initiatives might encourage some urban non-riders to begin riding in urban settings.

Table 17 overleaf shows the initiative **most frequently** identified as likely to encourage urban non-riders to begin riding in urban settings is if more cycle lanes were provided that separate cyclists from other traffic by physical barriers (56%), followed by drivers being more considerate of cyclists (48%).

Note that these two initiatives are more frequently identified by *Recreational on-road* and *Recreational off-road riders* compared with the other two non-riding urban segments.

It is also interesting that painted cycle lanes were significantly less frequently mentioned as an initiative that would encourage cycling compared with the extent to which physically separated cycle lanes were (38%).



Table 17: Most effective cycling initiatives to encourage urban cycling – urban non-cyclists

Q17. Would you be encouraged to cycle more often to get around town ...?

	All Urban Non-riders	Recreational on-road riders	Recreational off-road riders	Supportive non-riders	Less supportive non-riders
Base =	1400 %	350 %	233 %	406 %	411 %
If there were more cycle lanes with a physical barrier separating cyclists from other traffic	56	73	69	53	38
If drivers were more considerate of cyclists	48	66	57	47	28
If you lived closer to work/study	41	52	47	43	28
If the roads were in better condition	39	55	44	38	24
If there were more painted cycle lanes on the road	38	59	49	33	19
If you had access to publicly available bikes on-demand (without having to own or store them)	34	42	36	35	27
If you could take a bike on a bus or train at any time	34	46	35	37	22
If your friends/family started cycling more	31	45	32	29	19
If traffic got so bad it would be faster to cycle	30	45	37	28	16

The base numbers shown are unweighted counts.

Total may not sum to 100% due to rounding.

Note: The first column is based on the four non-urban cycling segments and respondents who state they are unlikely to cycle in urban settings in the next 12 months.



18. The attitudes of urban non-riders to cyclists may need changing, particularly in terms of sharing the road.

Table 17 overleaf presents the attitudes of current urban riders (i.e. *Urban riders - Committed commuters, Regular urban riders, and Occasional urban riders*) and current urban non-riders (*Recreational on-road riders, Recreational off-road riders, Supportive non-riders, and less supportive non-riders*) to various issues relating to the sharing of roads between cyclists and motorists.

While all groups were in agreement that they 'give cyclists at least one metre when they pass them on the road' and that 'cyclists should always move over to the left if a vehicle needs to pass', there was less agreement with attitudes relating to cyclists giving way to motorists. This is an important finding given cyclists' concerns with their personal safety.

For example, 63% of *Less supportive non-riders* agreed that 'cyclists should **immediately** move out of the way if a car is held up behind them', whereas 27% of *Urban riders – Committed commuters* agreed with this behaviour.

In the same vein, 74% of *Urban riders – Committed commuters* agreed that it is 'sometimes **reasonable** for cyclists to ride in the middle of the lane, even if there is a car behind them', whereas 31% of *Less supportive non-riders* agreed with this behaviour.



Table 18: Attitudes to cyclists' interactions with motorists

	Base =	Total	Urban riders – Committed commuters	Regular urban riders	Occasional urban riders	Recreational on-road riders	Recreational off-road riders	Supportive non-riders	Less supportive non-riders
		2108	156	163	262	350	233	484	460
		%	%	%	%	%	%	%	%
I give cyclists at least 1 metre when I pass them on the road*									
Agree		91	90	96	92	93	91	90	85
Neither agree nor disagree		4	4	3	4	4	4	4	6
Disagree		3	3	2	3	2	5	2	5
Don't know/NA		2	4	0	1	0	0	3	3
Total		100	100	100	100	100	100	100	100
Cyclists should immediately move out of the way if a car is held up behind them									
Agree		52	27	48	45	48	56	57	63
Neither agree nor disagree		19	21	14	23	21	15	20	18
Disagree		27	50	37	32	30	27	21	17
Don't know/NA		1	2	1	0	1	2	3	2
Total		100	100	100	100	100	100	100	100
It is sometimes reasonable for cyclists to ride in the middle of the lane, even if there is a car behind them									
Agree		44	74	63	51	40	41	41	31
Neither agree nor disagree		12	8	8	11	14	8	16	13
Disagree		41	18	29	36	45	50	40	53
Don't know/NA		2	0	0	2	1	2	3	3
Total		100	100	100	100	100	100	100	100

Continued



Table 17: Attitudes to cyclists' interactions with motorists (continued)

	Base =	Total	Urban riders – Committed commuters	Regular urban riders	Occasional urban riders	Recreational on-road riders	Recreational off-road riders	Supportive non-riders	Less supportive non-riders
		2108	156	163	262	350	233	484	460
		%	%	%	%	%	%	%	%
I feel comfortable allowing 1 metre between myself and a parked car when cycling									
Agree		60	59	64	56	60	NA	NA	NA
Neither agree nor disagree		12	8	15	15	9	NA	NA	NA
Disagree		28	33	22	29	31	NA	NA	NA
Don't know/NA		0	1	0	0	0	NA	NA	NA
Total		100	100	100	100	100	100	100	100
If it's safe to do so, cyclists should always move over to the left if a vehicle needs to pass									
Agree		90	81	90	90	92	88	92	89
Neither agree nor disagree		5	8	5	4	5	6	4	4
Disagree		5	8	5	5	3	6	3	5
Don't know/NA		2	3	0	1	1	1	1	2
Total		100	100	100	100	100	100	100	100

The base numbers shown are unweighted counts.
 Total may not sum to 100% due to rounding.
 *This statement was only asked of motorists (n=2,005).