2024 Walking, Cycling and Micromobility Monitor

NZ Transport Agency
Waka Kotahi
July 2025

BACKGROUND OF THE RESEARCH MONITOR

This research monitors the attitudes and behaviours around walking, cycling and micromobility of New Zealanders in 6 urban centres.

It looks at how often they travel by these active modes and for what purposes. It also explores their motivations for walking, cycling and e-scootering and the barriers that prevent from doing so or doing so more often. Undertaken every year since 2018, this study also allows the comparison of results over time.

This research monitor has been conducted by TRA on behalf of NZ Transport Agency Waka Kotahi (NZTA). It is part of a wider NZTA research and insights programme designed to identify what is important to New Zealanders and to support effective design and investment in the transport network by NZTA and its many transport partners.

The primary objectives of the research programme

1

Measure and monitor walking, cycling and micromobility behaviour.

- Comparing results over time (2024 vs 2023, 2022, 2021, 2020, 2019 & 2018).
- Comparing results across main urban centres in New Zealand.

2

Understand attitudes and perceptions towards walking, cycling, micromobility.

3

Identify what is important to travellers, supporting effective design and investment in the transport network by NZTA and partners.

The approach

Monitoring urban walking, cycling, and micromobility attitudes, perceptions and behaviours.

A 15-minute online survey of n=3,817 New Zealanders, 18+ years in 2024

With a focus on key regions of:

- Auckland n=668
- Wellington n=628
- Christchurch n=641
- Hamilton n=646
- Tauranga n=609
- Dunedin n=625

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

- n=3,817 +/-1.59%
- n~500 is +/-4.4%
- n~200 is +/-6.9%

Fieldwork ran from January 13th 2024 – December 19th 2024

Daily invitations were sent out continuously over the fieldwork period, to ensure that seasonal difference were accounted for.

Fieldwork was completed via an online survey using Dynata's research panel

Respondents on the panel were invited to participate in a survey; they were not told the subject of the survey prior to starting, as per industry best practice, to avoid any self-selection bias.

Interlocking quotas were utilised

Age and gender quotas were used within each region to ensure data is representative according to Stats NZ 2018 census.

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

Data was weighted to be representative of the calendar year with a population n=3,817 New Zealanders

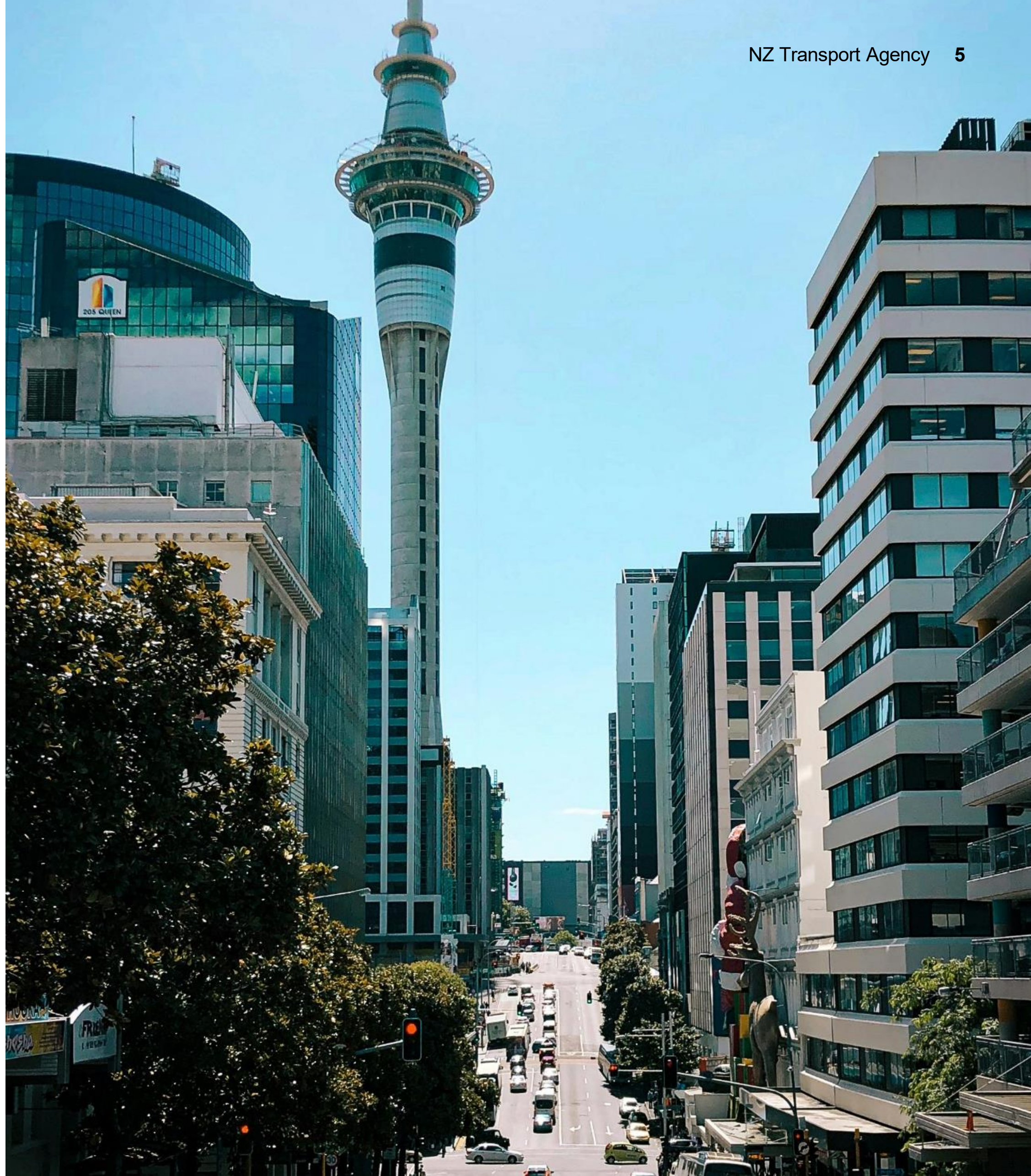
The key regions were weighted to

- Auckland 24%
- Wellington 24%
- Christchurch 24%
- Hamilton 10%
- Tauranga 9%
- Dunedin 9%

People living in these areas will be referred to as Urban New Zealanders.

Since January 2024 the monitor has over sampled Māori, weighting back to the census 2023 proportions found in each region, to enable sub-group analysis where applicable.

Summary: Key findings



TRA

SUMMARY

Active mode behaviours

2024 KEY SNAPSHOT METRICS:

83%	82%	12%	5%	44%
of urban New Zealanders use active modes* at least once a week.	of urban New Zealanders are walking as a way of getting places at least once a week (47% most days, 35% once to a few times a week).	of urban New Zealanders are cycling as a way of getting places at least once a week (push bike or e-bike).	of urban New Zealanders are e-scootering as a way of getting places at least once a week.	of weekly trips are travelled using active modes.

*For simplicity, in this report e-scootering has been grouped as an active mode and included in active mode proportions. We will review the appropriateness of this for the next report.

Source: NZTA Walking, cycling, and micromobility monitor, January – December 2024

SUMMARY

Active mode behaviours

WALKING BEHAVIOURS

The proportion of urban New Zealanders who have walked* in the last 12 months remains high (92%). Consistent with 2023, nearly half (47%) of this group walk frequently – four or more times per week on average.

Among those who walk, there has been an increase in the proportion who do so regularly to commute (48%), get around town (62%), and for recreational purposes (71%) over the past year.

The number of Committed Walkers—those who walk most days a week for commuting or getting around—has grown, now making up 29% of the surveyed population. This increase is not due to new walkers but rather to Urban Walkers (those who walk to reach destinations) walking more often, particularly in Hamilton, Tauranga, and Dunedin.

CYCLING BEHAVIOURS

The majority of urban New Zealanders (77%) are able to ride a bicycle. However, among those who can ride, fewer than half (46%) own or have access to a bike.

Just over 1 in 5 of New Zealanders (22%) have cycled in the past year, either for transport or recreation. Among push bike cyclists half (52%) are cycling at least once a week. This is higher among e-bike riders (67%). 18% of New Zealanders are part of the Urban Riders segment - those who use cycling as a way of getting around.

E-bike usage has been steadily increasing, with 8% of New Zealanders having used one in the past year - a significant rise from 2023.

Over a quarter (29%) of those without an e-bike express interest in owning one. Interest is higher among those who currently own a push bike (40%), but there is still appetite among those who do not own any type of bike (20%).

MICROMOBILITY BEHAVIOURS

Almost 1 in 4 (24%) of urban New Zealanders now own or have access to an e-scooter.

Along with an increase in ownership and access - both weekly and annual use of e-scooters is at its highest point since measuring micromobility in this monitor began in 2019, both increasing significantly in 2024. 5% of urban New Zealanders report using an e-scooter once a week.

E-scootering is enabling trips that might not have otherwise been made, with 49% reporting such experiences in the past year, for both functional (91%) and recreational (42%) purposes.

*walking 100m or crossing the road

Source: NZTA Walking, cycling, and micromobility monitor, January – December 2024

SUMMARY

Perceptions of Walking

The majority of urban New Zealanders (90%) support walking in their communities. It is widely viewed as an easy and efficient way to get around town, with this perception strengthening over the past 12 months (73%).

However, views on the ease of using footpaths and crossing roads have returned to 2022 levels after a temporary increase in 2023. 78% find footpaths easy to use and 73% feel the same about crossing roads.

Perceptions of safety remain stable, with 47% feeling very safe and 32% feeling at least somewhat safe walking in their region. Walking at night and sharing paths with bicycles or e-scooters are the situations where people are less likely to say they feel safe. Feelings of safety are lower among females than males, and regionally, they are lowest in Auckland and highest in Dunedin.

KEY SNAPSHOT METRICS:

90% of urban New Zealanders are supportive of walking in their community

79% of urban New Zealanders feel safe walking in their region.

73% of urban New Zealanders feel walking is a great way to get around town easily and efficiently.

Source: NZTA Walking, cycling, and micromobility monitor, January – December 2024

SUMMARY

Perceptions of Cycling

Support for cycling in the community remains stable, with 68% of New Zealanders supportive. Cyclists receive social support to cycle, with 59% encouraged by family and 41% by friends.

Perceptions of safety remain stable, with 22% feeling very safe and 54% feeling at least somewhat safe cycling in their region. Cyclists feel safest in parks or domains, on quiet local roads, or on roads with lanes separated from traffic.

Support for investment in cycling infrastructure remains relatively stable, with over half in favour.

SUPPORT OF INFRASTRUCTURE INVESTMENT:

58%
Agree that investing in cycle lanes is important because it gives people more travel options

55%
Agree that investing in cycle lanes is important because it gets people outside exercising.

59%
Agree the opening of cycle ways/paths has encouraged me to cycle more (among cyclists only)

KEY SNAPSHOT METRICS:

68% of urban New Zealanders are supportive of cycling in their community

59% of cyclists feel encouraged to cycle by their family.

54% of cyclists feel safe cycling in their region.

71% of cyclists agree that cycling is a great way to get around town easily and efficiently.

Source: NZTA Walking, cycling, and micromobility monitor, January – December 2024

SUMMARY

Perceptions of Micromobility

Over half of New Zealanders (56%) support e-scootering in their community, significantly lower than support for walking (90%) and cycling (68%).

Around half of pedestrians (47%) feel unsafe sharing spaces with e-scooters. Their primary concerns are e-scooter speed (79%) and riding close to pedestrians (72%). Half (53%) of pedestrians report having a negative interaction with an e-scooter rider in the past year - a collision (5%), near miss (29%), or being startled (37%).

Among e-scooter riders, three quarters (78%) feel safe when riding. However, 44% report experiencing a crash or near miss in the past year. 42% report always wearing a helmet when riding. However, those who own an e-scooter are significantly more likely to say they do this (69%).

KEY SNAPSHOT METRICS:

56% of urban New Zealanders are supportive of e-scootering in their community.

78% of e-scooter riders feel safe e-scootering in their region.

47% of pedestrians feel unsafe sharing spaces with e-scooters.

Source: NZTA Walking, cycling, and micromobility monitor, January – December 2024

SUMMARY

Motivators and barriers for walking, cycling, and micromobility

MOTIVATORS AND BARRIERS FOR WALKING

The top four motivations are tied to fitness (71%) and 'me time' (52%), and enjoyment (55%) and enjoying the weather (49%). Functional reasons for walking are less motivational to urban New Zealanders.

The most common barrier to walking more is not feeling safe walking in the dark (36%). Logistical challenges, such as travel speed and carrying items, are the second and third most reported barriers, each affecting 1 in 3 people (33%).

While the leading barriers remain unchanged year-over-year, the average number of barriers reported by walkers has increased.

MOTIVATORS AND BARRIERS FOR CYCLING

Safety remains a major barrier to cycling, with not feeling safe because of how people drive the strongest barrier (43%). The number of reported barriers is increasing, though motivations for cycling are also growing.

Fitness (69%) and fun (61%) are still the top motivators, with cost savings (56%) and 'me time' (42%) becoming more prominent and significantly higher than 2023. The motivation of cycling to save money has been growing since 2021, except in Auckland.

Among those interested in owning an e-bike, cost remains the main barrier to e-bike adoption, with 74% citing the price of purchase and 32% noting the cost of hiring or using a shared e-bike as limiting factors. Other common barriers for this group were uncertainty if they would use it enough (29%) and lack of safe secure places to park it (27%).

MOTIVATORS FOR MICROMOBILITY

The main reasons for e-scootering are fun (49%) and efficiency (41%), with a third (34%) using e-scooters when walking is too far.

Source: NZTA Walking, cycling, and micromobility monitor, January – December 2024

CONTENTS

Overall travel behaviour

1

SUMMARY

Overall travel behaviour

Most urban New Zealanders (83%) continue to regularly engage with active modes of transport, consistent with 2023.

Walking remains the most common active mode, with around 8 in 10 people (82%) across regions walking regularly (at least once a week). Just over 1 in 10 (12%) people cycle at least once a week. Whilst this has remained stable overall, 2024 has seen significant changes in some regions – Wellington has seen a significant increase in the amount of people cycling regularly, and Auckland a significant decline. E-scootering also saw an increase in regular users from 2023 to 2024, with significant increases observed in Tauranga and Christchurch.

The amount of people regularly using a motor vehicle has declined significantly over the same time period, with most notable reductions occurring in Auckland and Wellington.

But among the majority of New Zealanders who are currently using active modes, the share of total trips made using these modes is increasing. This primarily driven by a significant increase in the proportion of trips people are choosing to walk.

Most New Zealanders are engaging with active modes on a weekly basis

Active modes
- Walking
- Cycling (push bike and e-bike)
- E-scootering

Over 4 in 5 people engage in active modes at least once per week.
Accounting for a recent methodological change* this is in line with 2023 figures for active modes use.

83%

USE OF ACTIVE MODES AT LEAST ONCE PER WEEK*

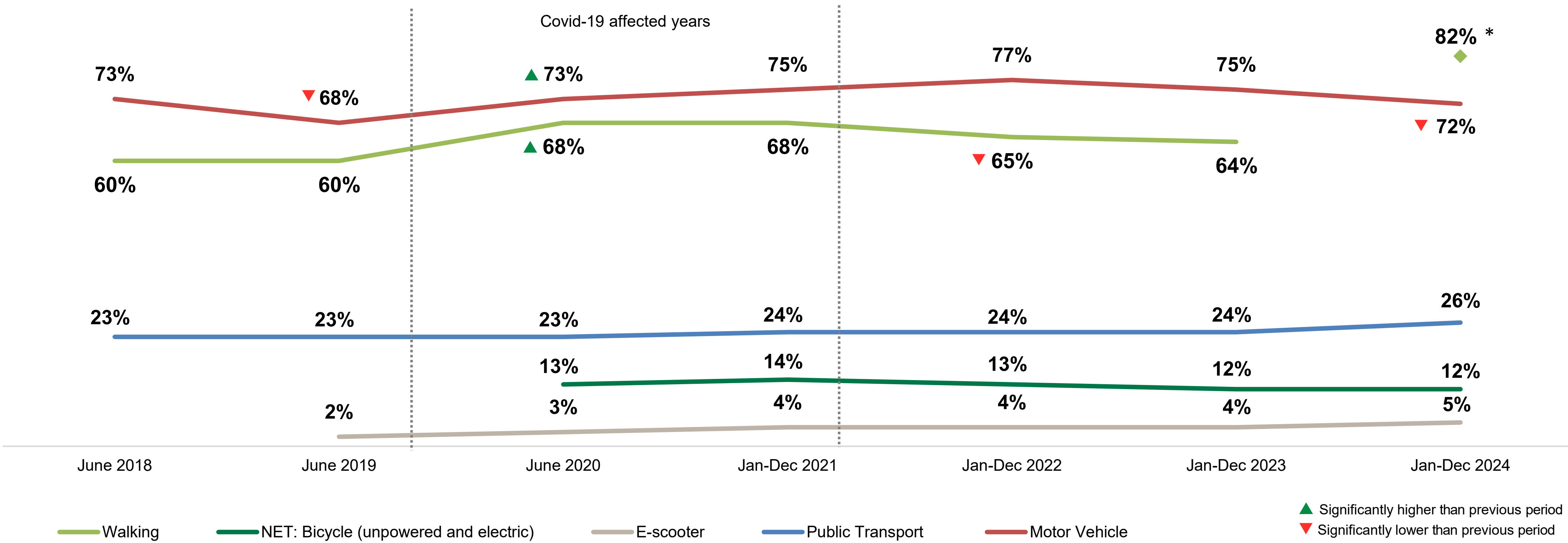
Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample continuous April - December 2024 n = 2847
Walking defined as walking 100m or crossing the road
* To ensure a more accurate measurement from April 2023 respondents who indicated they had not walked 100 meters or crossed a road in the last year were asked a follow up question confirming this was the case. Due to a lack of direct comparability with past data, only a single point has been shown from the 2024 period

Use of active modes has stayed consistent over time

However, significantly fewer people are using a motor vehicle on a weekly basis compared to 2023.

USE OF TRANSPORT MODES OVER TIME (AT LEAST ONCE PER WEEK)

2018 – 2024 YEARLY TRENDS



Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, 2018 n=2,115, 2019 n=2,174, 2020 n=2,256. 2021 n=2152, continuous 2021 n= 4924, continuous 2022 n=3278, continuous 2023 n = 3170, continuous 2024 n = 3817. Walking base: Total sample April – December 2024 n=2847
- Walking defined as walking 100m or crossing the road

* *To ensure a more accurate measurement from April 2023 respondents who indicated they had not walked 100 meters or crossed a road in the last year were asked a follow up question confirming this was the case. Due to a lack of direct comparability with past data, only a single point has been shown from the 2024 period*

Regular usage of active modes is greatest in Wellington, Christchurch and Dunedin

USE OF ACTIVE MODES BY REGION (AT LEAST ONCE PER WEEK)

JAN-DEC 24*

		Total	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
	NET: Active Modes	83%	79%	77%	82%	88%	86%	86%
Active mode	Walking	**82%**	77%	75%	80%	88%	83%	85%
Active mode	NET: Cycling	**12%**	8% ▼	14%	16%	12% ▲	17%	9%
Active mode	Bicycle (push bike, unpowered)	**10%**	7% ▼	12%	12%	8% ▲	15%	7%
Active mode	E-bike	**4%**	3%	5%	7%	5% ▲	4%	2%
Active mode	E-scooter	**5%** ▲	4%	3%	5% ▲	5%	8% ▲	4%
	NET: Public transport	**26%**	31%	19%	10% ▲	38%	21%	20%
	NET: Motorised vehicle	**76%** ▼	74% ▼	77%	87%	69% ▼	81%	75%

▲ Significantly higher than 2023
▼ Significantly lower than 2023

There have been significant changes in some regions:

Cycling
The amount of people cycling has seen a significant increase in Wellington, but a significant decrease in Auckland.

Micromobility
Tauranga and Christchurch have seen a significant increase in people regularly using an e-scooter.

Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, continuous 2024 n=3817, Auckland n=668, Hamilton n=646, Tauranga n=609, Wellington n=628, Christchurch n=641, Dunedin n=625
*Full year Jan-Dec 2024, except for walking and active modes, where total = April – December 2024 due to methodological change in March 2024.
Walking defined as walking 100m or crossing the road
NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter) NET: Cycling (Unpowered, Electric bike) NET: Public Transport (Bus, Train, Ferry)

New Zealanders are completing a greater proportion of their total weekly trips by walking in 2024

This has occurred as the share of weekly trips undertaken in private vehicles has significantly reduced.

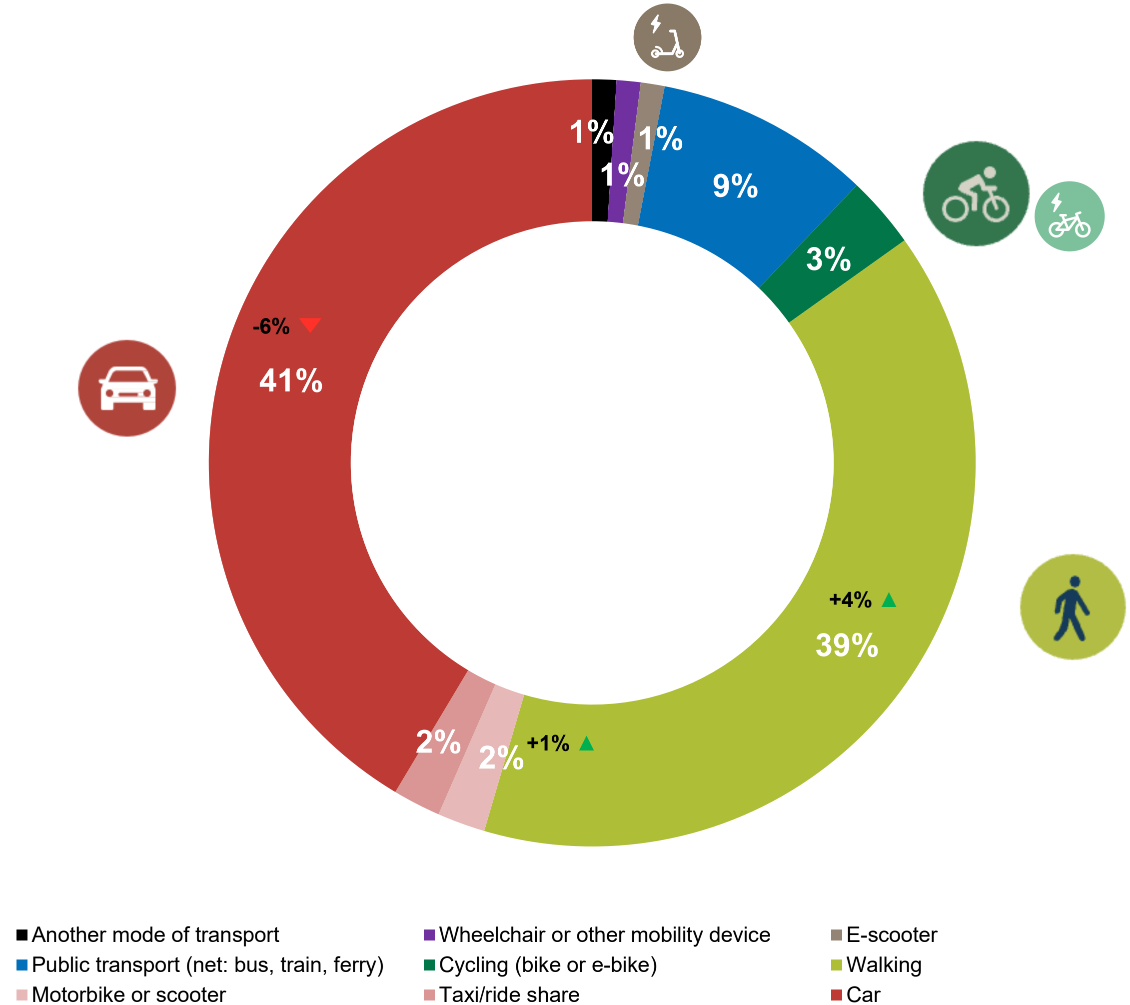
This shift is most notable among 35-54 year olds and those working from home. Both these groups are showing significant increases in walking and significant decreases in private motor vehicle use.

▲ Significantly higher than 2023
▼ Significantly lower than 2023

Q26. Thinking about the past week, how many times did you use each type of transport when traveling for these occasions? *Base: Total sample:* 2023 n = 3170, 2024 n = 3817, 35-54 n=13
Walking defined as walking 100m or crossing the road

MODE SHARE OF TOTAL WEEKLY TRIPS TRAVELLED BY EACH MODE

JAN-DEC 24



People are completing a higher share of trips walking across a range of trip types

In 2024 active modes accounted for just under half (44%) of the total share of trips New Zealanders take in the last week.

MODE SHARE OF TOTAL WEEKLY TRIP TRAVELLED BY TYPES OF TRIP IN THE LAST WEEK

JAN-DEC 24

	Total	To get to or from work	To get to or from school, college, university	To go to or from visiting friends or family	To get to or from shops	As a part of my job	To get to or from a place of recreation	To get to or from somewhere else	To take children to or from school/day care	To get to or from doctor/dentist/ pharmacy
NET: Active Modes	44%	43%	39%	47%	43%	44%	48%	45%	39%	39%
Walking	39% ▲	38% ▲	30%	43% ▲	39%	40% ▲	44% ▲	41%	36% ▲	33% ▲
Cycling	3%	3%	7% ▲	2%	2%	2%	4%	3%	2%	3% ▲
E-scooter	1%	1%	2% ▲	1%	1%	1%	1%	2%	1%	3% ▲
Car	41% ▼	43% ▼	20% ▼	41% ▼	47%	46% ▼	40% ▼	38%	53% ▼	40% ▼
Train	2%	3%	6% ▲	2%	1%	1%	1%	2%	1%	3%
Bus	6%	7%	20% ▲	5%	5%	3% ▼	5%	6%	3% ▼	6% ▼

Q26. Thinking about the past week, how many times did you use each type of transport when traveling for these occasions?
Base: Total Sample continuous 2023 n=3170, 2024 n = 3817

Trips travelled in last week by mode
Walking defined as walking 100m or crossing the road

▲ Significantly higher than 2023
▼ Significantly lower than 2023

A closer look at walking

2

SUMMARY

A closer look at walking behaviour

The proportion of New Zealanders who have walked* in the last 12 months remains high (92%). Consistent with 2023, nearly half (47%) of this group walk frequently – four or more times per week on average.

Among those who walk, there has been an increase in the proportion who do so regularly to commute (48%), get around town (62%), and for recreational purposes (71%) over the past year.

The number of Committed Walkers—those who walk most days a week for commuting or getting around—has grown, now making up 29% of the surveyed population. This increase is not due to new walkers but rather to Urban Walkers (those who walk to reach destinations) walking more often, particularly in Hamilton, Tauranga, and Dunedin

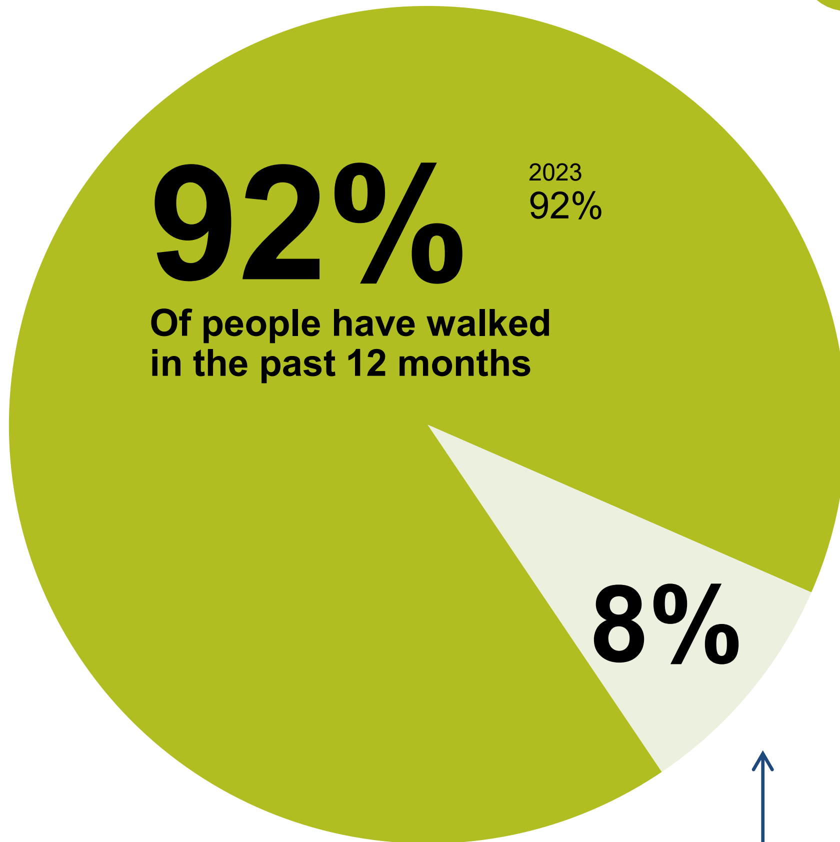
*walking 100m or crossing the road

Over 9 in 10 Urban New Zealanders have walked in the last 12 months

PROPORTION OF PEOPLE WALKING IN THE PAST 12 MONTHS
JAN-DEC 24

Whilst a majority of people across demographic segments have walked in the last 12 months:

- Māori (89%) and Pacific Island (87%) people are significantly less likely to have walked in the last 12 months than other ethnic groups.
- Those aged 55+ (89%) are less likely than younger urban New Zealanders to have walked in the last 12 months.

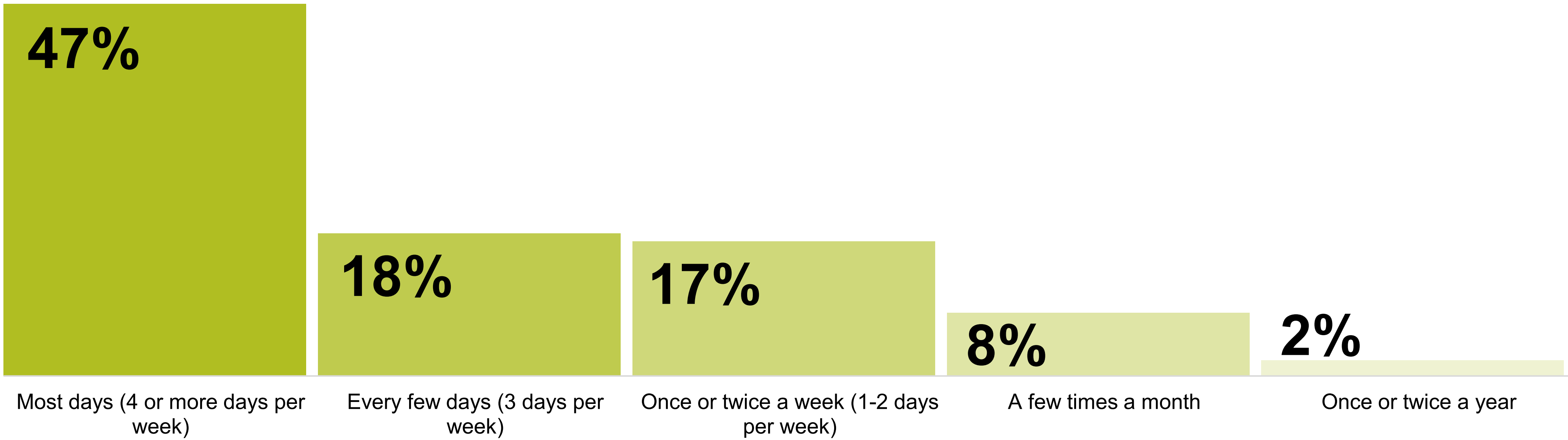


8% of people have not walked 100m or crossed a road in the past 12 months*

Q23A: Which of the following have you used in [Region] in the past 12 months? This can be for any reason, including work, sport or recreation. Q23b; You indicated that you have not walked 100m or crossed the road in the last 12 months. Are you sure?
Walk for at least 100m and/or cross the road.
Base Total Sample continuous 2024 n = 3817, Māori n=1052, Pacific Islander n=180, 55+ n=951
* including 5% of people who have not walked because they are physically unable

Among those who are walking, nearly half are doing this most days of the week

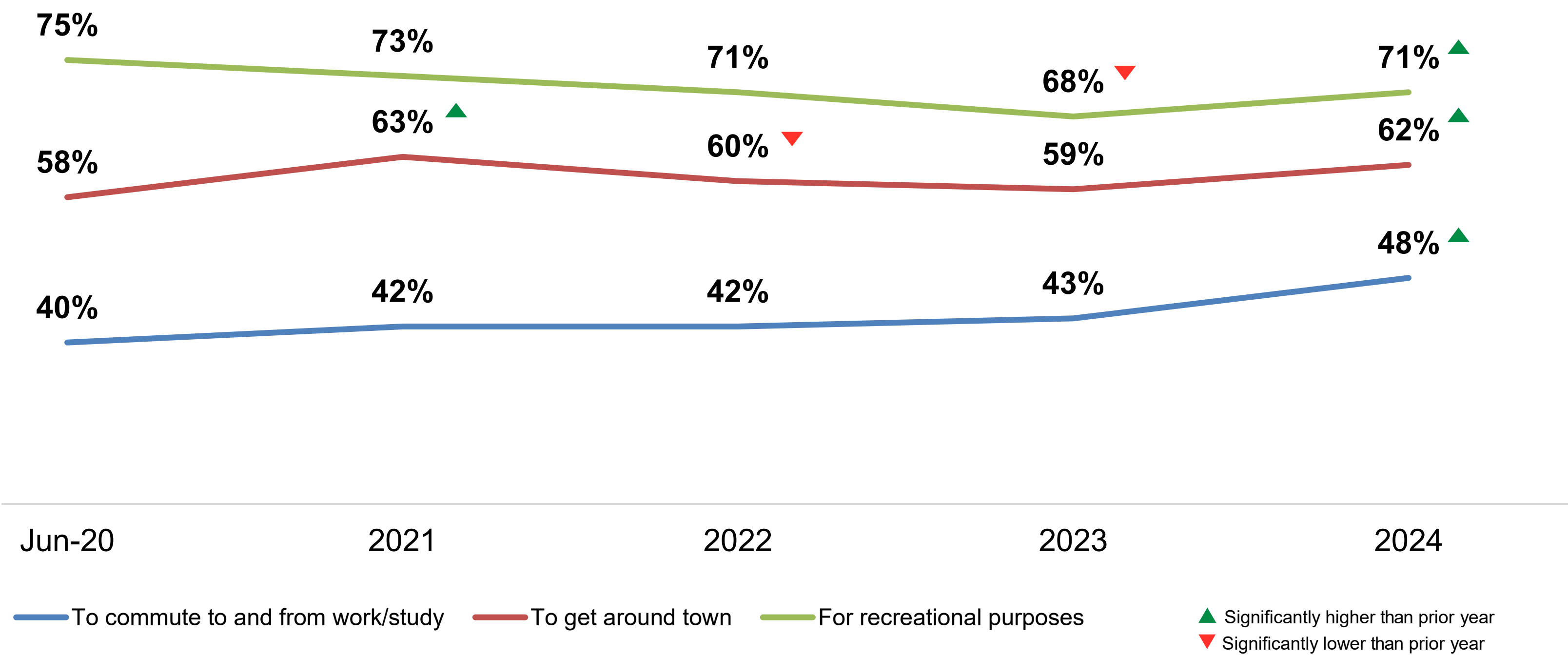
WALKING FREQUENCY – BASED ON THOSE WHO WALKED* IN THE LAST 12 MONTHS
APRIL-DEC 24



Q24: On average, how often do you use each of the following modes of transport, for any reason? Base Sample of Walkers in P9 months, April-December 2024 n=2643
* Walk for at least 100m and/or cross the road.
To ensure a more accurate measurement from April 2023 respondents who indicated they had not walked 100 meters or crossed a road in the last year were asked a follow up question confirming this was the case.

The proportion of walkers who are walking regularly to commute, get around town, and for recreational purposes has increased in the last year

WALKING FREQUENCY BY TRIP TYPE (AT LEAST ONCE PER WEEK) – BASED ON THOSE WHO WALKED* IN THE LAST 12 MONTHS
YEAR ON YEAR



Regular walking for the purposes of commuting is at its highest level since 2020 – representing nearly half (48%) of walkers.

W2 how often do your normally walk….?
Base: Walkers: 2020 n=1725, 2021 n= 3627, 2022 n=2443, 2023 n = 2806, 2024 n = 3535
*Walking defined as walking 100m or crossing the road
Changes to question structure and wording

Walkers across New Zealand differ based on the type and frequency of walking

WALKING SEGMENTATION FRAMEWORK

Non-walker

Haven't walked* to either commute to and from work / study, get around town or for recreational purposes in the last 12 months.

Recreational walker

Walk for recreational purposes at least once or twice a year.

Occasional walker

Walk to commute to and from work / study or to get around town a few times a month or once or twice a year.

Regular walker

Walk to commute to and from work / study or to get around town every few days or once or twice a week.

Committed walker

Walk to commute to and from work / study or to get around town most days.

Urban Walkers

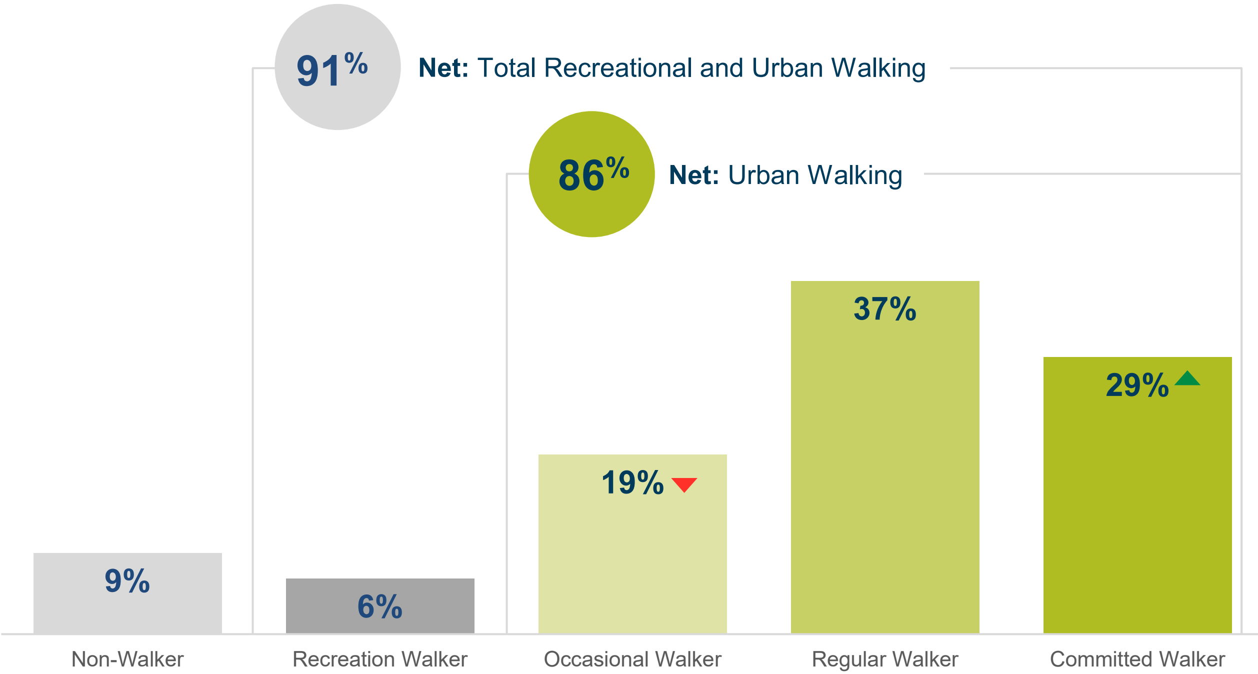
Those who walk as a way of getting places e.g., to and from work / study or around town.

*walked is defined as walking for at least 100m and/or crossing the road

As the total share of trips for walking increased, so has our Committed Walker segments

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

JAN-DEC 24



86%

of people are Urban Walkers

People are most commonly Regular Walkers – those who are commuting to and from work/study or to get around town every few days.

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 2024 n= 3817

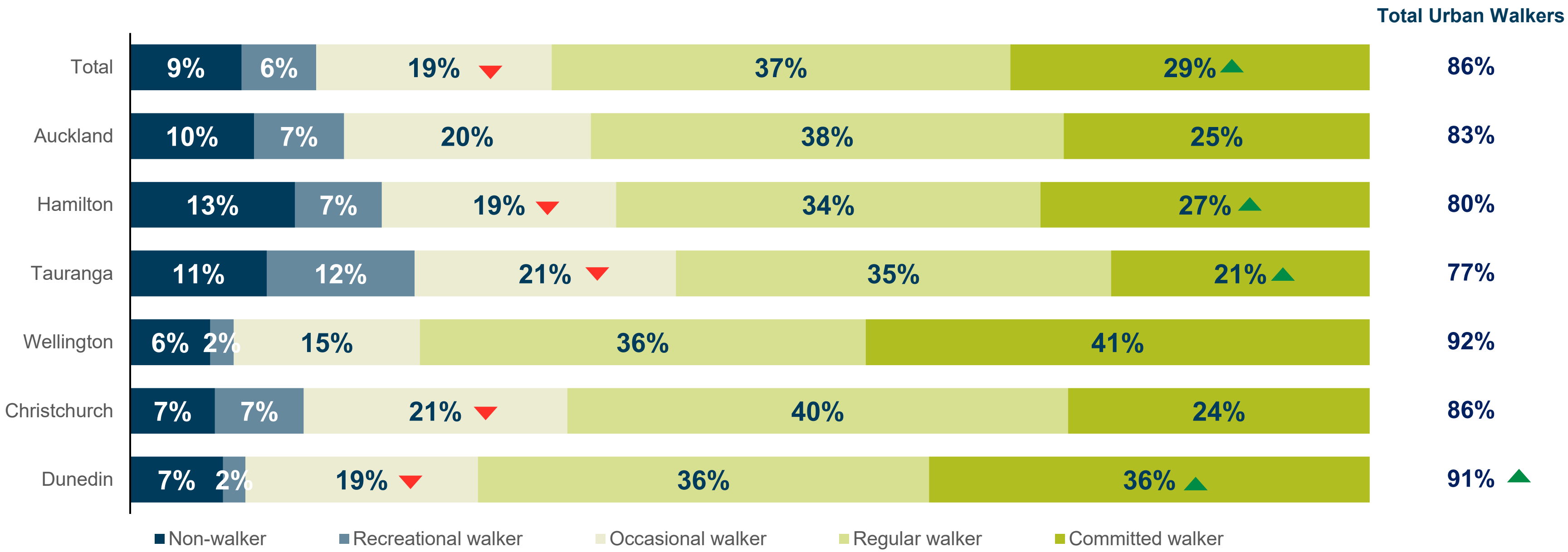
*Walk for at least 100m and/or cross the road either on foot or by use of wheelchair or mobility aid.
Change in methodology does not allow comparison across time. The change was made in April 2023.

▲ Significantly higher than prior year
▼ Significantly lower than prior year

This increase in Committed Walkers is being observed in Hamilton, Tauranga and Dunedin

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

JAN-DEC 24



In Hamilton and Tauranga a greater number of walkers are walking more often (the increase in Committed Walkers is coming from the Occasional Walker segment)

In Dunedin the past 12 months has seen both an increase in total Urban Walkers and walkers who are walking more often.

Q23a. Which of the following have you used in the past 12 months? W2. How often do you travel by foot… To commute to and from work/study, To get around town – to run errands, to go to shops, visit family, friends etc, For recreational purposes. Base: Total sample 2024 n=3817,

Auckland n=668, Hamilton n=646, Tauranga n=609, Wellington n=628, Christchurch n=641, Dunedin n=625
*Walk for at least 100m and/or cross the road either on foot or by use of wheelchair or mobility aid.

▲ Significantly higher than Apr-Dec '23
▼ Significantly lower than Apr-Dec '23

Perceptions of walking

3

SUMMARY

Perceptions of walking

The majority of New Zealanders (90%) support walking in their communities. It is widely viewed as an easy and efficient way to get around town, with this perception strengthening over the past 12 months (73%).

However, views on the ease of using footpaths and crossing roads have returned to 2022 levels after a temporary increase in 2023. 78% find footpaths easy to use and 73% feel the same about crossing roads.

Three quarters of walkers (79%) feel safe walking in their region, with no significant change in this perception. Walking at night and sharing paths with bicycles or e-scooters are the situations where people are less likely to say they feel safe. Feelings of safety are lower among females than males, and regionally, they are lowest in Auckland and highest in Dunedin.

The most common barrier to walking more is not feeling safe walking in the dark (36%). Logistical challenges, such as travel speed and carrying items, are the second and third most reported barriers, each affecting 1 in 3 people (33%). While the leading barriers remain unchanged year-over-year, the average number of barriers reported by walkers has increased.

Multiple factors continue to motivate walking, but the number of motivations remains stable. The top four motivations relate to personal wellbeing (fitness and 'me time') and enjoyment (fun and enjoying the weather), consistent with 2023. More functional reasons—such as cost, parking, convenience, saving time, avoiding traffic, or having no other option—have a smaller influence overall but are more significant among 18-34-year-olds compared to other age groups.

A majority of urban New Zealanders express support for walking and this has remained consistent over time

Walking is seen as an easy and efficient way to get around town - a perception that has strengthened in the community over the last 12 months

SUPPORT OF WALKING IN THE COMMUNITY - NET: SUPPORTIVE 6-10/10

90% (-%)

Are supportive of walking

2023 90%
2022 87% ▼
2021 89%

2024
3% NET: Not supportive (0-4)
6% Neither supportive nor unsupportive (5)

PERCEPTIONS OF WALKING - % STRONGLY AGREE / AGREE

73% (+2%) ▲

Agree that walking is a great way to get around town easily and efficiently

2023 71%
2022 69% ▼
2021 72%
2020 73%

▲ Significantly higher than previous year
▼ Significantly lower than previous year

Q7 - Now please tell us how much you agree or disagree with the following statements (Strongly agree + agree)
Q6d: Now thinking about walking and people who choose to walk for journeys such as travelling to work, going to shops or other activities. To what degree do you support walking in your community?
Base Total Sample 2024 n=3817, 2023 n= 3170, 2022 n= 3278 2021 n=4942, 2020 n=2267
Q6d added in 2021, Question order changed in 2020.

Whilst perceptions of walking being easy and efficient have increased, in practice, the ease of using footpaths, crossing the road and getting places has softened

Ease of using footpaths and crossing the road have reverted to 2022 levels after seeing an increase in positive perceptions in 2023.

EASE OF WALKING - % VERY EASY / SOMEWHAT EASY
JAN-DEC 24

	Use the footpaths in your area	Cross the roads in your area	Get to the place you want to go	Walk to places with the kids (Amongst those with children under 15)
2024	78% ▼	73% ▼	70% ▼	68%
2023	80% ▲	78% ▲	73%	68%
2022	77%	73%	72%	69%
2021	77%	72%	72%	71%
2020	78%	74%	73%	70%

▲ Significantly higher than previous year
▼ Significantly lower than previous year

Q29. Now we'd like you to think about when you are out and about and using footpaths in your area. This can include when you are walking, jogging, skateboarding, or in a wheelchair/mobility-aid device. Using the scale below, how easy do you find it to…
Base Total Sample 2024 n=3817, 2023 n=3170, 2022 n=3278, 2021 n=4942, 2020 n=2267 ,Household with children under 15 2024 n=817, 2023 n=664, 2022, n=622, 2021, n=905

A majority feel safe while walking, stable since 2022

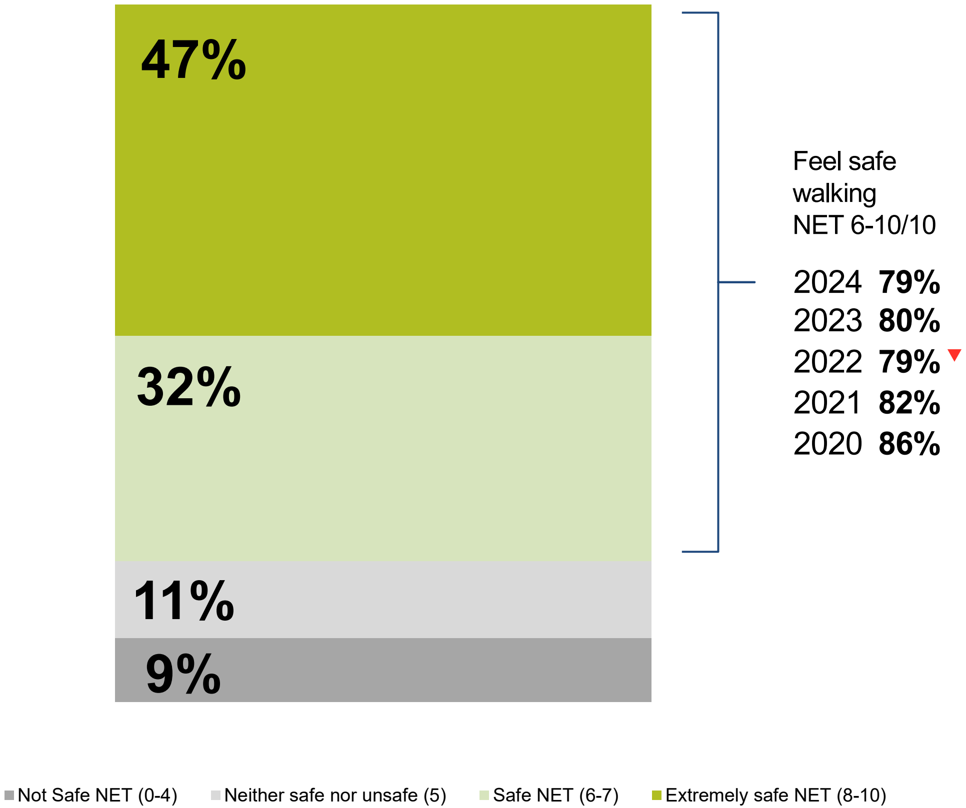
Safety for walking was higher in 2020. This may be due to the Covid-19 lockdowns where more people were out walking and there were fewer motorists on the road.

▲ Significantly higher than previous year
▼ Significantly lower than previous year

Q7A - In general, how safe are you/would you be walking in the [REGION] area?
Base: Physically able to walk 2024 n=3361, 2023 n= 2767, 2022 n=2750, 2021 n=4141, 2020 n=1949

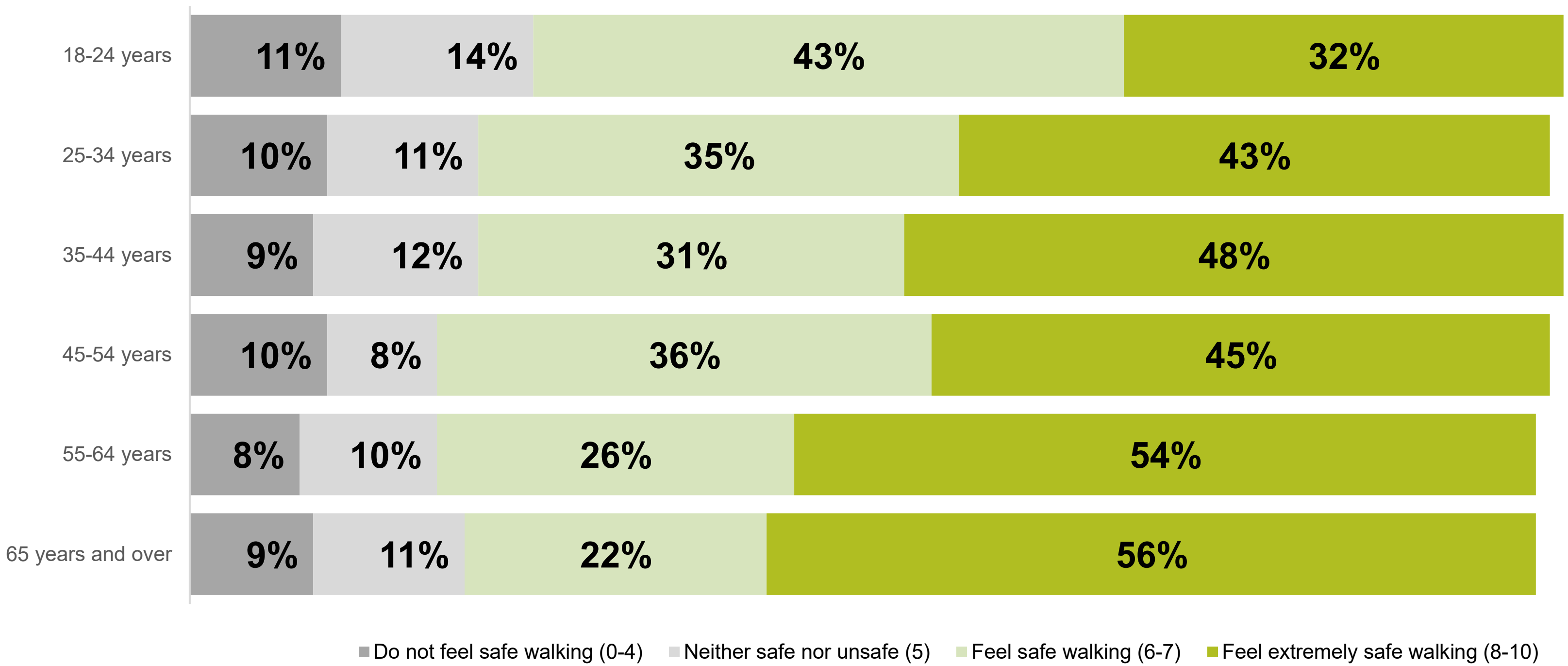
PERCEPTIONS OF SAFETY – % OF PEOPLE WHO FEEL SAFE WALKING

JAN-DEC 24



Younger New Zealanders are the least likely to feel safe walking

PERCEPTIONS OF WALKING SAFETY – % OF PEOPLE WHO FEEL SAFE/ UNSAFE WALKING BY AGE
JAN-DEC 24



These levels are consistent with 2023, indicating perceptions of safety are stable among different ages.

Q7A - In general, how safe are you/would you be walking in the [REGION] area?
Base: Physically able to walk 2024 18-24 n=538, 25-34 n=823, 35-44 n=702, 45-54 n=546, 55-64 n=339, 65+ n=413

▲ Significantly higher than Apr-Dec '23
▼ Significantly lower than Apr-Dec '23

Walking at night and on shared paths are situations where fewer urban walkers feel safe

Feeling safe when walking on shared paths and footpaths next to 50km streets is decreasing.

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

JAN-DEC 24

	Jan-Dec 24	2023	2022	2021	2020
Overall	79%	80%	79% ▼	82% ▼	86%
At night	42%	42%	44%	45% ▼	52%
On shared paths with bicycles and e-scooters	52% ▼	56%	59%	57%	56%
On a footpath adjacent to a street with a speed limit of 50 km/h or greater	72% ▼	75%	75%	77%	78%
Around the town centre(s)	75%	77%	78%	80%	82%
On a shared street with a speed limit of 10 km/h or less	77%	79%	78%	79%	80%
At a park/domain	78%	78%	79% ▼	82%	84%
On a footpath adjacent to a street with a speed limit of 30 km/h	81%	83%	82%	83% ▼	85%
Around schools	83%	85%	83%	83%	84%

Safe NET(6-7) Extremely safe NET(8-10)

Across all of these areas, the percentage of males who perceive walking as safe is significantly higher than for females.

The percentage of people who think these areas are safe to walk in is lowest among Auckland residents and highest among Dunedin residents.

Q7A - In general, how safe are you/would you be walking in the [REGION] area?
NET Safe: 6-10 out of 10
Base: Physically able to walk 2024 n=3361, 2023 n= 2767, 2022 n=2750, 2021 n=4141, 2020 n=1949

▲ Significantly higher than previous year
▼ Significantly lower than previous year

Across urban regions over two thirds are satisfied with the amount of paths, marked pedestrian crossings, stair-free footpaths, signage and wayfinding, and the continuity and connectivity of footpaths

WALKERS SATISFACTION WITH PEDESTRIAN INFRASTRUCTURE – % SATISFIED (5-7/7) BY REGION

JAN-DEC 24

	The amount of footpaths / shared use paths	The quality of footpaths	The quality of shared use paths	The amount of marked pedestrian crossings	Signage and wayfinding	The amount of stair-free footpaths to key destinations (e.g. grocery store, school, work)	The continuity and connectivity of footpaths
Overall	71%	63%	64%	73%	68%	70%	72%
Auckland	70%▼	62%	60%▼	70%▼	64%	67%▼	70%
Hamilton	75%	62%	65%	74%	72%	75%	72%
Tauranga	72%▲	71%	69%	72%	66%	71%	71%
Wellington	72%	62%▼	66%	75%	68%	68%	72%
Christchurch	68%▼	60%	64%	72%	71%	73%	74%
Dunedin	77%	64%	65%	75%	70%	70%	71%

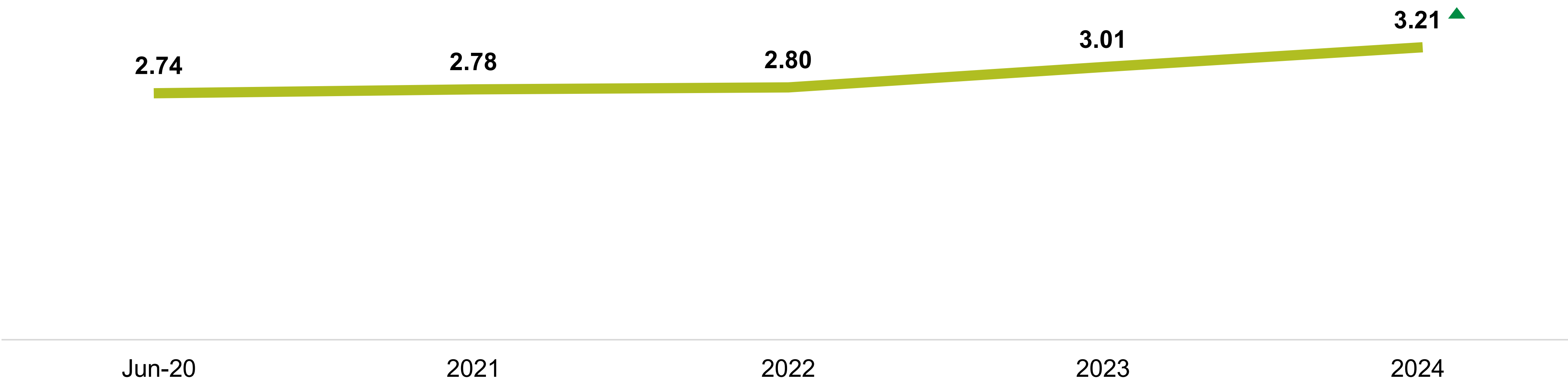
Q29c - Now please think about pedestrian infrastructure in [REGION].How satisfied are you with…?
Base Walkers 2024/2023 Overall n=3535/2806, Auckland n=608/480, Hamilton n=582/433, Tauranga n=557/452, Wellington n=588/470, Christchurch n=601/516, Dunedin n=599/455

▲ Significantly higher than 2023
▼ Significantly lower than 2023

Despite growth in walking, walkers face multiple factors holding them back from walking as much as they otherwise would, and this number is increasing over time

On average, walkers experience 3.21 barriers stopping them from walking more than they are currently.

AVERAGE AMOUNT OF BARRIERS TO WALKING OVER TIME (OUT OF 19)

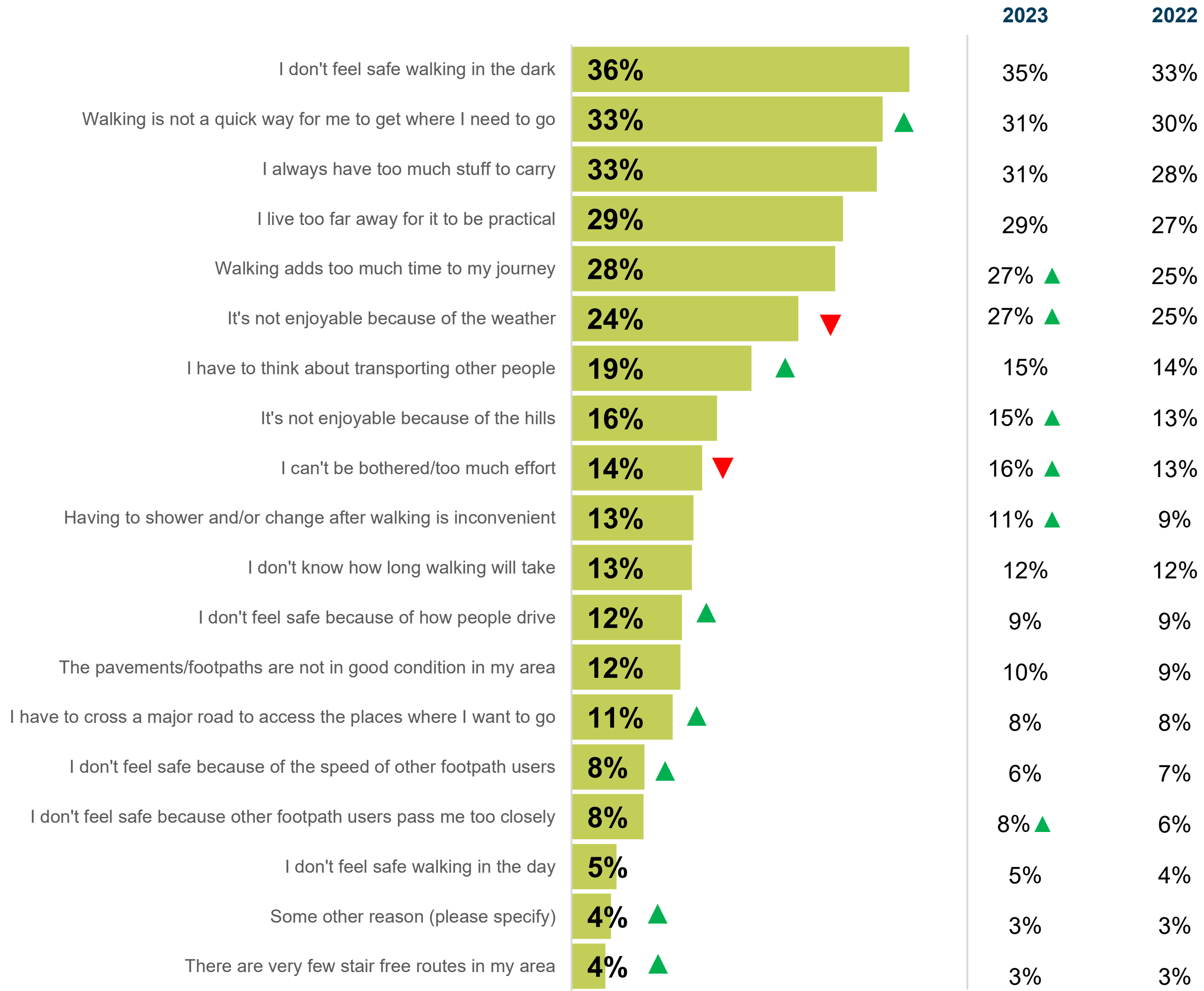


Q34A. Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you?
Base: Physically able to walk, Total 2024 n=3361, 2023 n=2767, 2022 n=2750, 2021 n=4141, 2020 n=1949.

▲ Significantly higher than previous year
▼ Significantly lower than previous year

Safety concerns when walking in the dark remains the top individual barrier to walking; but logistical considerations like speed of travel and having to carry things impact 1 in 3 walkers

BARRIERS TO WALKING OVER TIME



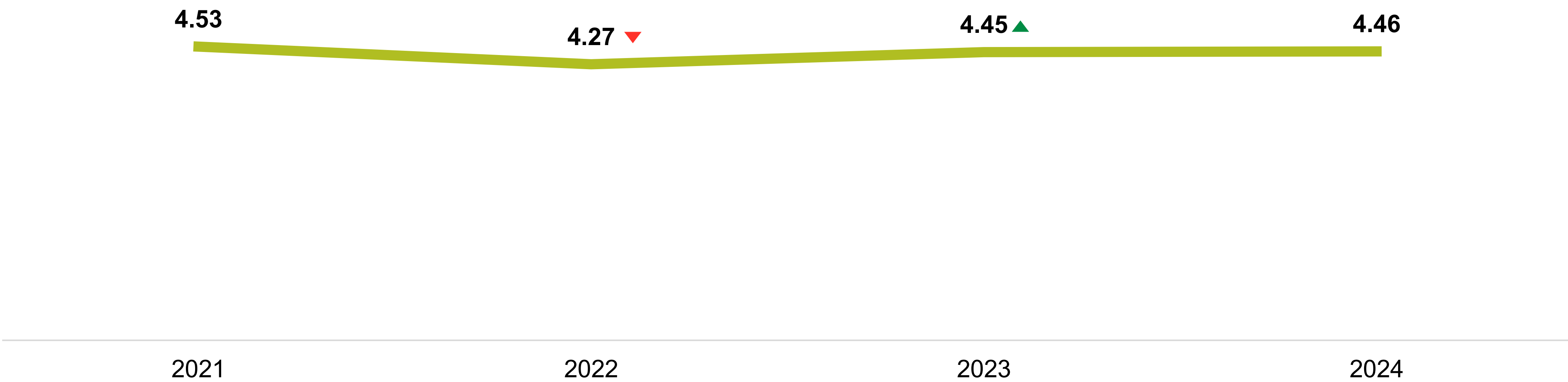
Q34A. Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you? Base: Physically able to walk, Total 2024 n=3361, 2023 n=2767, 2022 n=2750.

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Whilst the number of barriers to walking is increasing, the number of factors motivating walkers has stayed fairly consistent

Walkers are motivated to walk by a range of reasons. Over the past few years, people have reported on average 4 reasons for why they choose to walk.

AVERAGE AMOUNT OF MOTIVATIONS TO WALKING OVER TIME (OUT OF 14)



▲ Significantly higher than previous year
▼ Significantly lower than previous year

Q33. Looking at the list below, what are the main reasons you choose to walk?
Base defined walkers 2024 n=2688, 2023 n=2806, 2022 n=2443, 2021 n=2853
* Q33 added in 2021

Since 2022, individual motivations for walking remained stable

The top four motivations are tied to personal wellbeing (fitness and 'me time') and enjoyment (fun and enjoying the weather), with more functional motivations having a smaller impact on motivating New Zealanders to walk.

WALKING MOTIVATORS

JAN-DEC 24

	Jan-Dec 24	2023	2022	2021
Keeps me fit/helps me get fitter	71%	69%	68% ▼	73%
It's fun, I enjoy walking	55%	58%	57%	59%
Provides me with some 'me time'	52%	52% ▲	49%	51%
Allows me to enjoy the weather	49%	49% ▲	46% ▼	50%
It's cheaper/saves money	47%	47%	47% ▲	43%
Avoids parking hassles	37%	35% ▲	30% ▼	34%
Availability of paths/walking routes	33%	31%	30%	32%
Helps address environmental concerns	20%	21%	23%	25%
More convenient than driving/public transport	20%	21%	20% ▼	23%
Better walking routes are available now	16%	17% ▲	14% ▼	20%
Saves time - I can get there faster by walking	16%	16%	15%	15%
Too much traffic to drive - helps reduce traffic congestion	15%	14%	13%	13%
There is no other way to get where I want to go	11%	12%	10%	10%

Functional motivations (related to cost, parking, convenience, saving time, avoiding traffic, no other option) are significantly higher for 18-34 year olds than 35-54 and 55+ year olds.

Females are significantly more motivated by personal wellbeing motivators than males.

'Me time' and cost savings are stronger motivators for Māori than people of other ethnicities.

Q33. Looking at the list below, what are the main reasons you choose to walk?
Base defined walkers 2024 n=2688, 2023 n=2806, 2022 n=2443, 2021 n=2853
* Q33 added in 2021, 2024 18-34 n=1060, 2024 35-54 n=988, 2024 55+ n=640

▲ Significantly higher than prior year
▼ Significantly lower than prior year

A closer look at cycling

4

SUMMARY

A closer look at cycling behaviour

The majority of New Zealanders (77%) are able to ride a bicycle. However, among those who can ride, fewer than half (46%) own or have access to a bike. Bicycle ownership and access has softened across most regions, except in Wellington, where ownership/access has significantly increased since 2023.

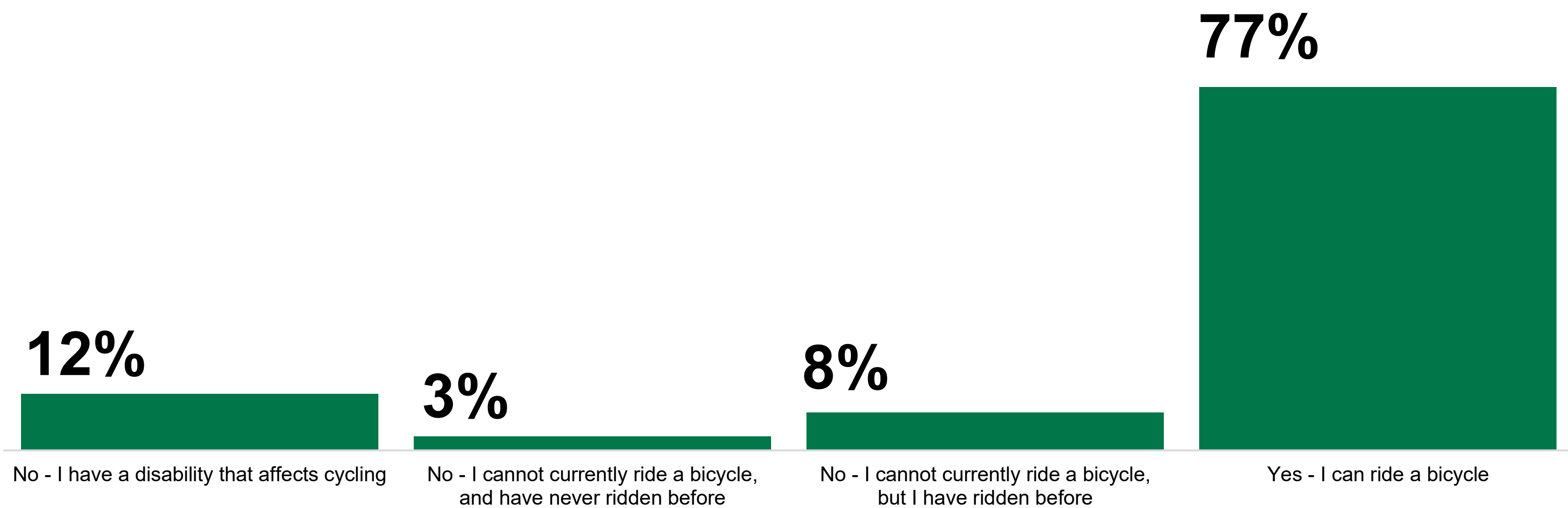
Just over 1 in 5 of New Zealanders (22%) have cycled in the past year, either for transport or recreation. Among push bike cyclists half (52%) are cycling at least once a week. This is higher among e-bike riders (67%). 18% of New Zealanders are grouped into the Urban Riders segment - those who use cycling as a way of getting around. While the overall size of these cycling segments has remained stable since 2023, Wellington has seen a significant increase in Urban Riders, whereas Auckland has experienced a decline. Hamilton now has the highest proportion of Recreational Riders, following significant growth in this segment in 2024.

Among those with access to a bicycle, about a third (34%) also own or have access to an e-bike, indicating some cyclists use both types of bikes. E-bike usage has been steadily increasing, with 8% of New Zealanders having used one in the past year - a significant rise from 2023.

Over a quarter (29%) of those without an e-bike express interest in owning one. This rises to 40% for those who already own/ have access to a push bike. Cost remains the main barrier to e-bike adoption, with 74% citing the price of purchase and 32% noting the cost of hiring or using a shared e-bike as limiting factors. Other common barriers were uncertainty if they would use it enough (29%) and lack of safe secure places to park it (27%).

Over three quarters of New Zealanders can ride a bicycle, consistent with 2023

ABILITY TO RIDE A BICYCLE
JAN-DEC 24



	No - I have a disability that affects cycling	No - I cannot currently ride a bicycle, and have never ridden before	No - I cannot currently ride a bicycle, but I have ridden before	Yes - I can ride a bicycle
2023	12% ▼	3% ▼	8%	77% ▲
2022	14% ▼	4% ▲	8%	73%
2021	16%	3%	7%	74%

A greater proportion of 18-34 year olds (84%) and 35-54 year olds (85%) can ride a bicycle than 55+ year olds (61%).

Those living in Christchurch are more likely to be able to ride a bicycle than other regions (83%).

82% of Māori can ride a bicycle, significantly higher than other ethnicity groups.

Q2X: Can you ride a bike?
Base Total Sample 2024 n=3817, 2023 n= 3170, 2022 n=3278, 2021 n=4924

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Fewer than half of those who can ride, own or have access to a bike they could use

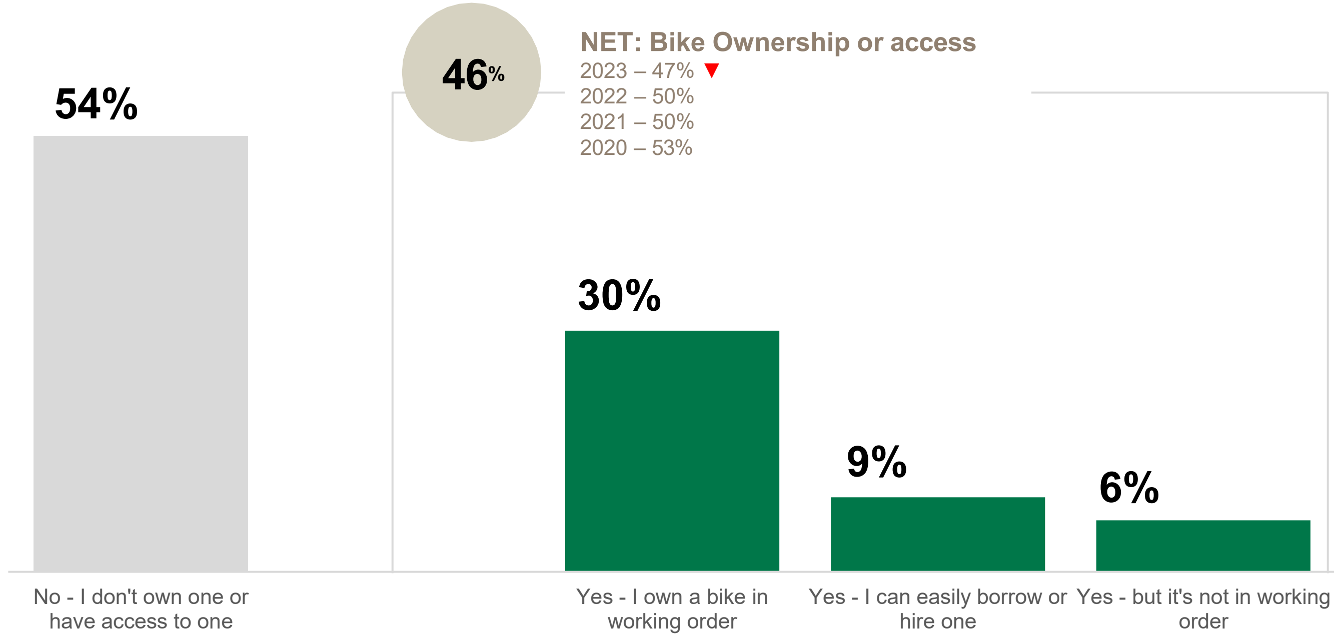
34%

of people who own/ have access to a bicycle also own/have access to an e-bike

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Q2: Do you own or have access to a bicycle you could easily use
Base ability to ride a bike and knows how 2024 n=3369, 2023 n= 2780, 2022 n=2722, 2021 n-4194
Those who cannot cycle due to a disability are removed from the analysis

BIKE OWNERSHIP/ACCESS
JAN-DEC 24



	No - I don't own one or have access to one	Yes - I own a bike in working order	Yes - I can easily borrow or hire one	Yes - but it's not in working order
2023	53%	30%	10%	6%
2022	50%	32%	10%	8%
2021	50%	32%	11%	6%

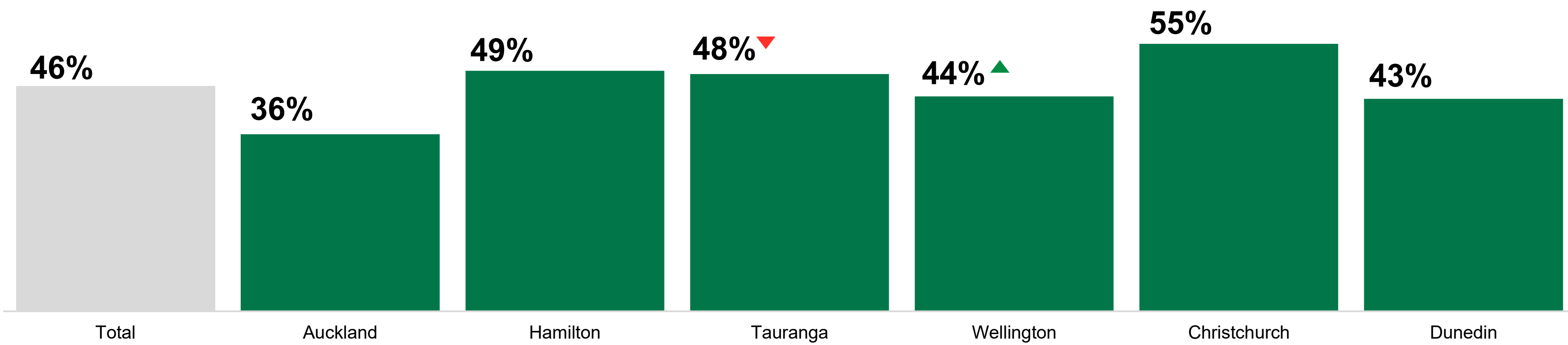
Whilst NET ownership or access is similar across ethnicity groups, Māori are more likely to have access to a bike they can easily borrow or hire or have a bike that is not in working order. Pakeha/NZ European and Asian are more likely than Māori and Pacific Island people to own a bike in working order.

Ownership of or access to a bicycle is the lowest it has been since 2020

Most of the regions measured observed a softening of bike ownership – only Wellington moved in the other direction with over 2 in 5 (44%) now owning or having access to a bicycle.

BIKE OWNERSHIP/ACCESS BY REGION

JAN-DEC 24



	Total	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
2023	**47%** ▼	**42%**	**48%**	**57%**	**37%**	**57%**	**44%** ▼
2022	**50%**	**43%**	**50%**	**57%**	**41%**	**60%**	**55%** ▲
2021	**50%** ▼	**43%**	**56%**	**52%**	**46%**	**60%**	**46%**
2020	**53%**	**47%**	**50%**	**60%**	**48%**	**63%**	**49%**

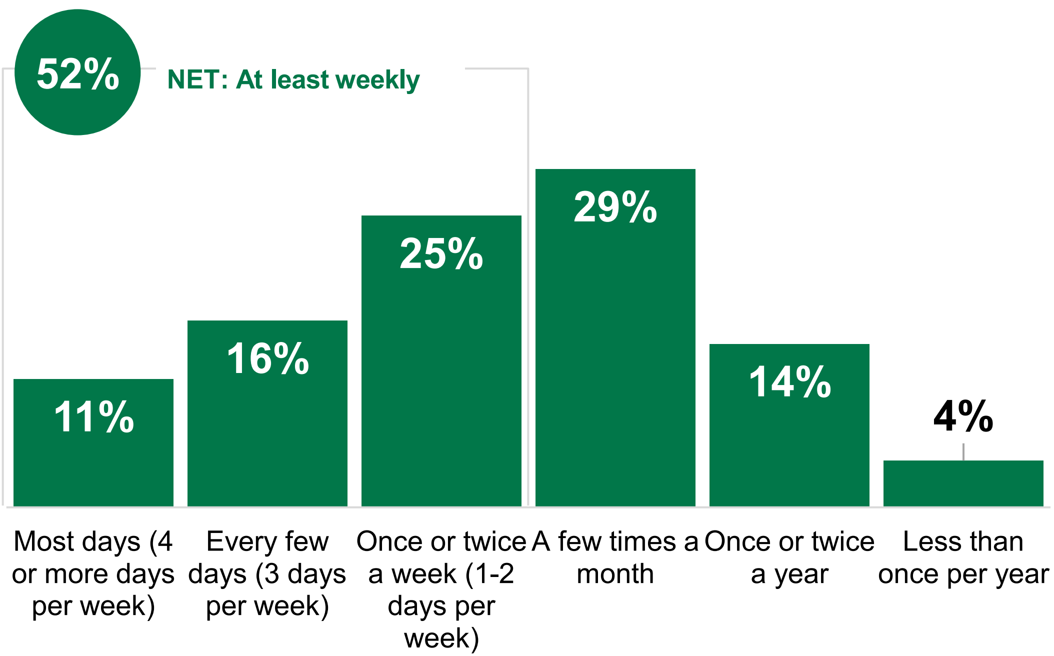
Q2: Do you own or have access to a bicycle you could easily use?
Base Physically able to ride a bike and knows how Total sample n=1962-3369, Auckland n=977-526, Hamilton n=177-561, Tauranga n=174-540, Wellington n=482, Christchurch n=428-869, Dunedin n=175-557
Those who cannot cycle due to a disability are removed from the analysis

▲ Significantly higher than prior year
▼ Significantly lower than prior year

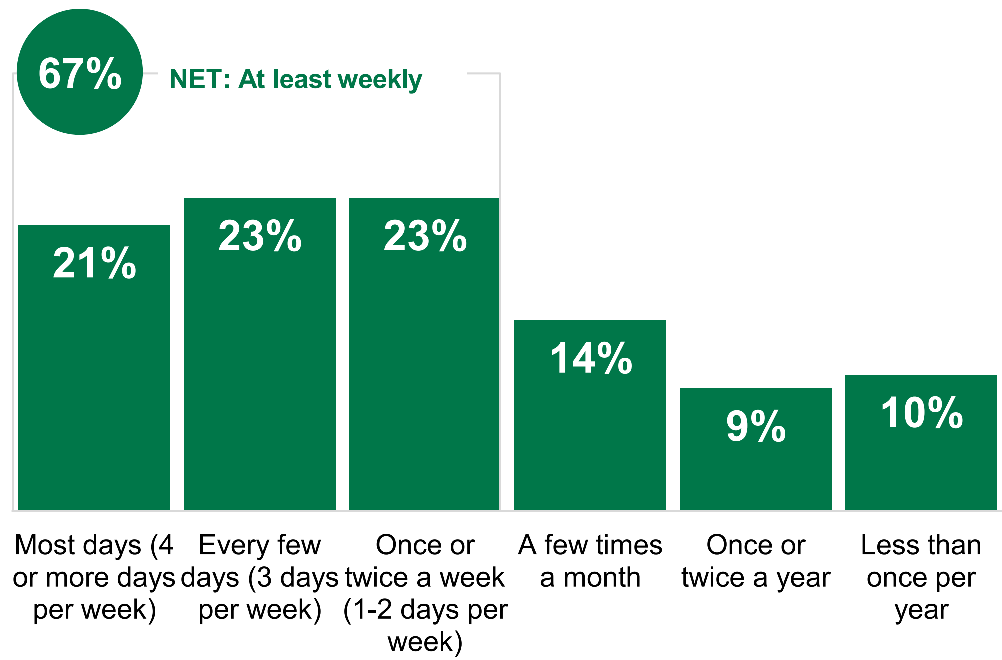
Among those who ride a push bike, half do this at least weekly. This is higher among e-bike riders.

CYCLING FREQUENCY
JAN-DEC 24

RODE A PUSH BIKE IN THE LAST 12 MONTHS



E-BIKED IN THE LAST 12 MONTHS



Q24: On average, how often do you use each of the following modes of transport, for any reason? [NET push-bike and electric bike]
Base Cycled in Last 12 months sample 2024 n = 860, 2023 n = 662

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Cyclists across New Zealand differ based on the type and frequency of cycling

CYCLING SEGMENTATION FRAMEWORK

Less supportive not currently riding

Haven't used a bike to either commute to and from work/study, get around town or for recreational purposes in the last 12 months and are less supportive of cycling in their community.

Supportive not currently riding

Haven't used a bike to either commute to and from work/study, get around town or for recreational purposes in the last 12 months but are supportive of cycling in their community.

Recreational rider

Use a bike for recreational purposes at least once or twice a year.

Occasional rider

Use a bike to commute to and from work / study or to get around town a few times a month or once or twice a year.

Regular rider

Use a bike to commute to and from work / study or to get around town every few days or once or twice a week.

Committed rider

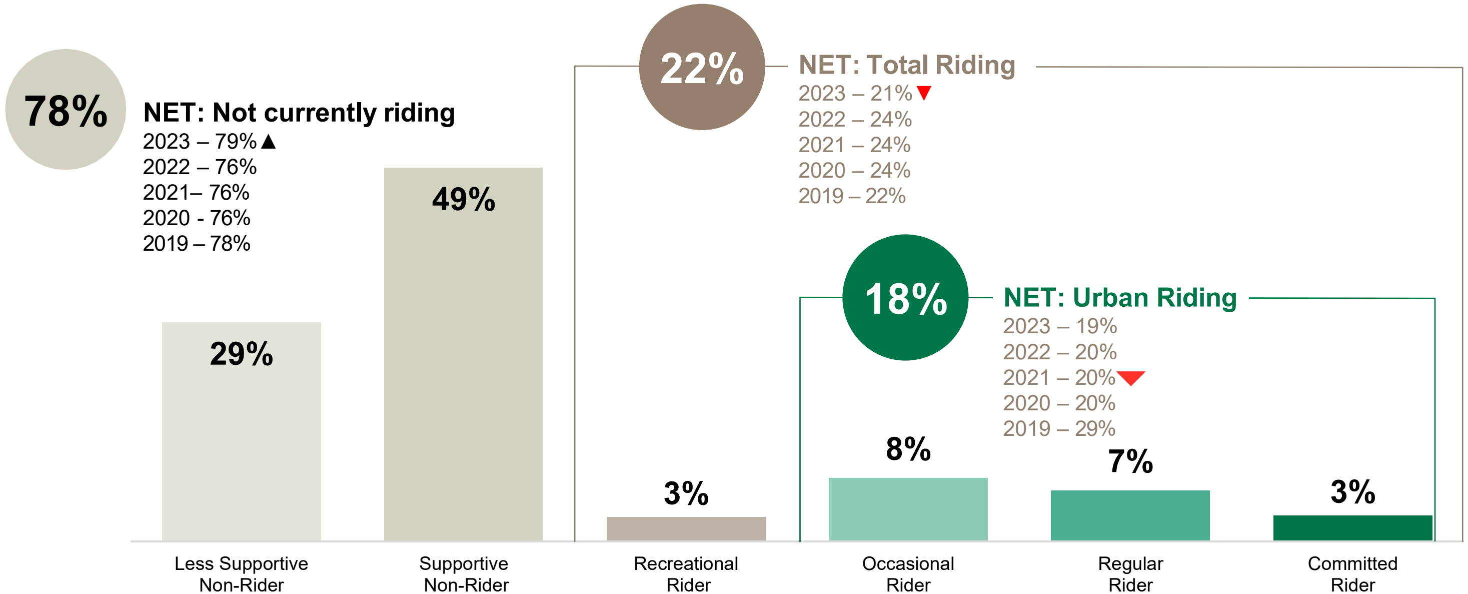
Use a bike to commute to and from work / study or to get around town most days.

Urban Riders

Those who cycle as a way of getting places such as to and from work / study or around town.

Just over 1 in 5 have cycled in the past year, either as a way of getting to places or for recreational reasons

CYCLING SEGMENTATION FRAMEWORK – % BASED ON CYCLING* IN THE LAST 12 MONTHS
JAN-DEC 24



	Less Supportive Non-Rider	Supportive Non-Rider	Recreational Rider	Occasional Rider	Regular Rider	Committed Rider
2023	**29%**	**50%**	**3%** ▼	**8%**	**7%**	**3%**
2022	**28%**	**48%**	**4%**	**9%**	**7%**	**3%**
2021	**28%**	**48%**	**4%**	**8%**	**8%**	**3%**
2020	**26%**	**49%**	**5%**	**10%**	**6%**	**3%**
2019	Change in response options				**6%**	**3%**

The proportion of urban New Zealanders in each of the cycling segments has remained stable since 2023.

1 in 10 urban New Zealanders cycle as a way of getting around at least once a week (Regular Rider, Committed Rider).

Q23a. Which of the following have you used in [REGION] in the past 12 months? Q6. How often do you currently ride a bicycle or e-bike?
Q6r: X- How often do you currently ride a bicycle or e-bike Base: 2024 n=3817, 2023 n=3170, 2022 n=3278, 2021 n=4924, 2020 n=2267
Changes made to response options which impact ability to compare not currently riding, recreational riders and occasional riders

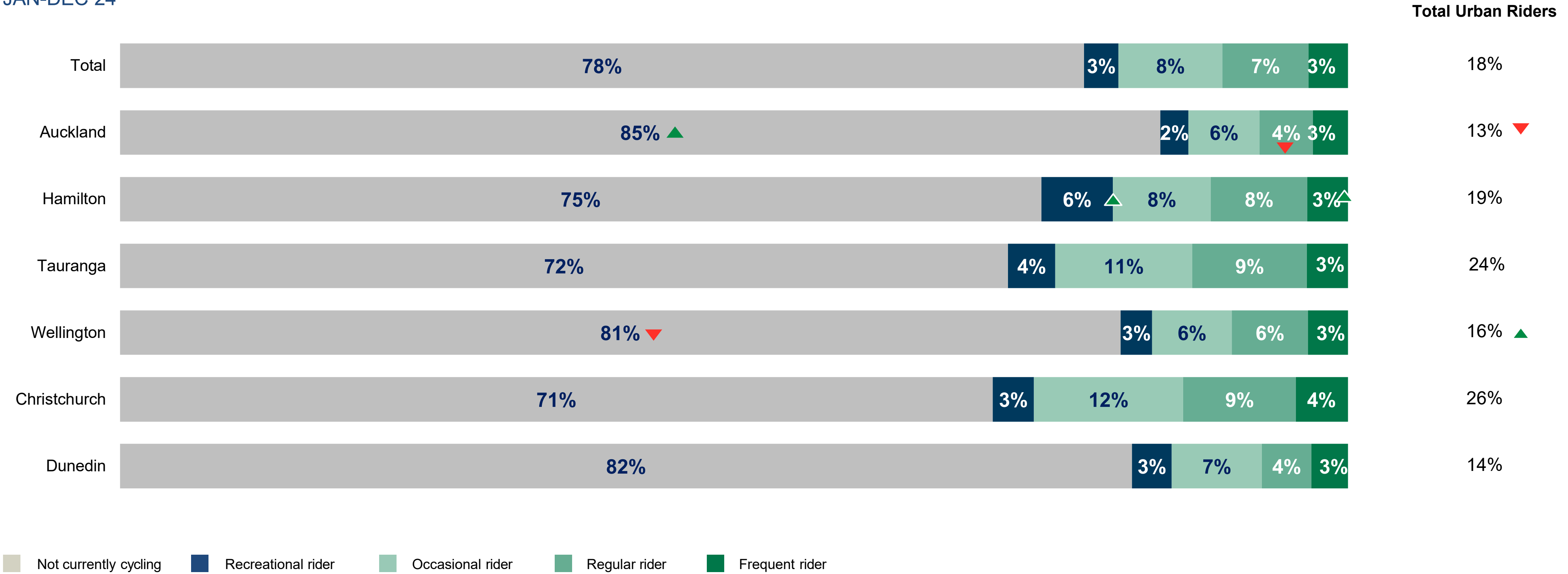
▲ Significantly higher than prior year
▼ Significantly lower than prior year

Wellington has seen a significant increase in its Urban Riders, while Auckland has observed a decline

The proportion of Recreational Riders in Hamilton has grown significantly, making it the region with the largest share of this segment in 2024.

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

JAN-DEC 24



Q23a. Which of the following have you used in [REGION] in the past 12 months? Q6. How often do you currently ride a bicycle or e-bike?
Base 2024 Total Sample n=3817, Auckland n=668, Hamilton n=646, Tauranga n=609, Wellington n=628, Christchurch n=641, Dunedin n=625

▲ Significantly higher than 2023
▼ Significantly lower than 2023

4.1
A closer look at e-bikes

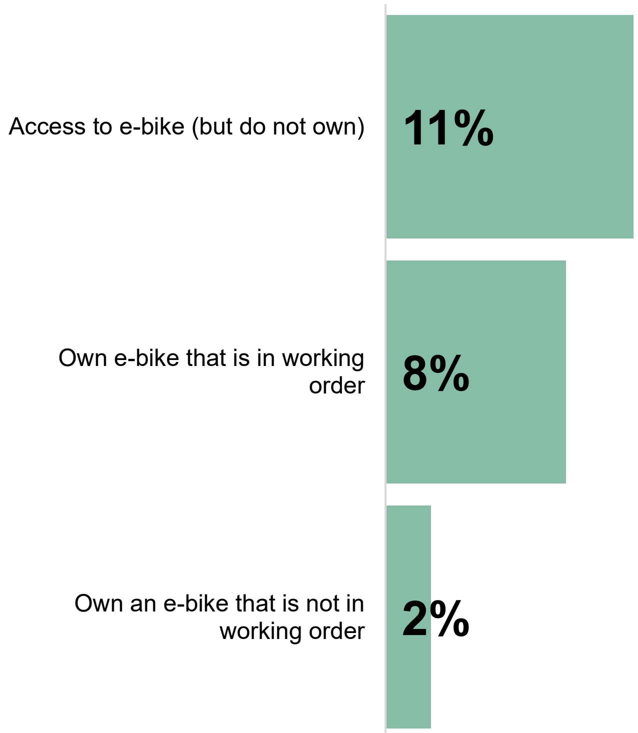
Just over one fifth of urban New Zealanders own or have access to an e-bike

ACCESS OR OWNERSHIP OF E-BIKES
JAN-DEC 24

21%

Own or have access to an e-bike

2023 20%



19%

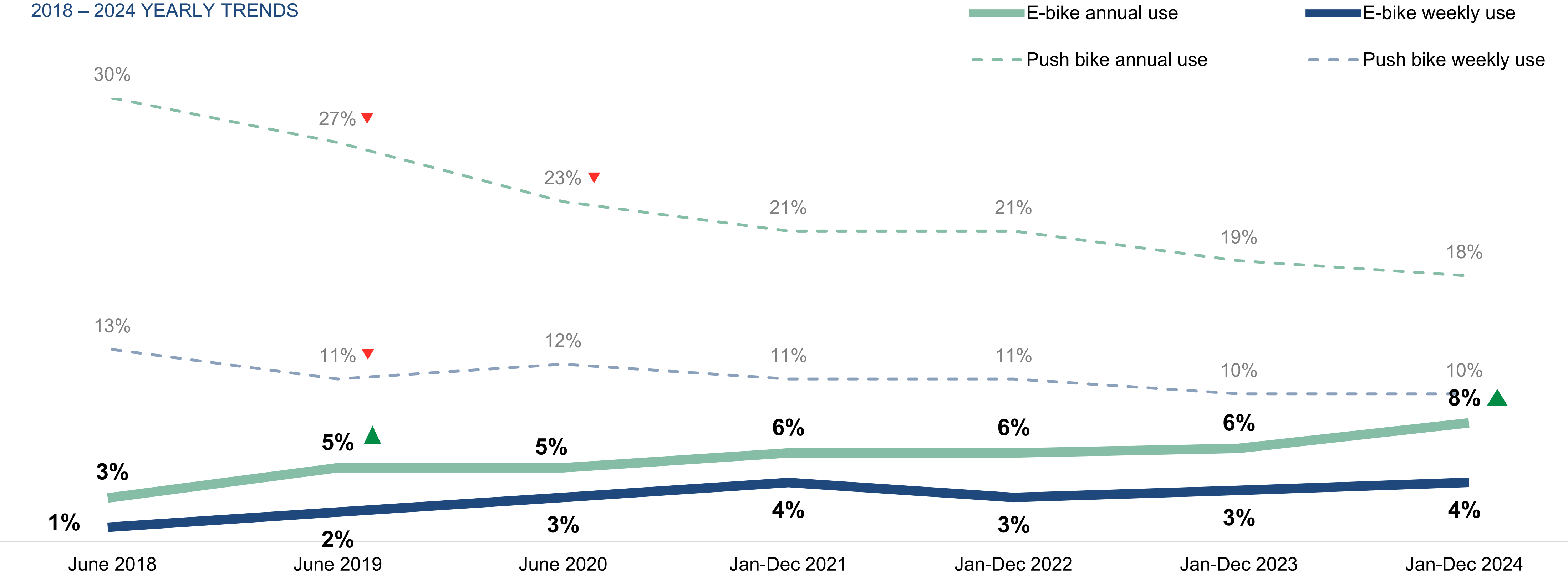
of those who own or with access to an e-bike are using them on a weekly basis

Q2A: Do you own or have access to an e-bike you could easily use? Q24. On average, how often do you use each of the following modes of transport, for any reason
Base Total Sample excluding those who cannot cycle due to a disability: 2024 n=3369, 2023 n= 2105

E-bike usage rates have been steadily climbing

E-BIKE USAGE

2018 – 2024 YEARLY TRENDS



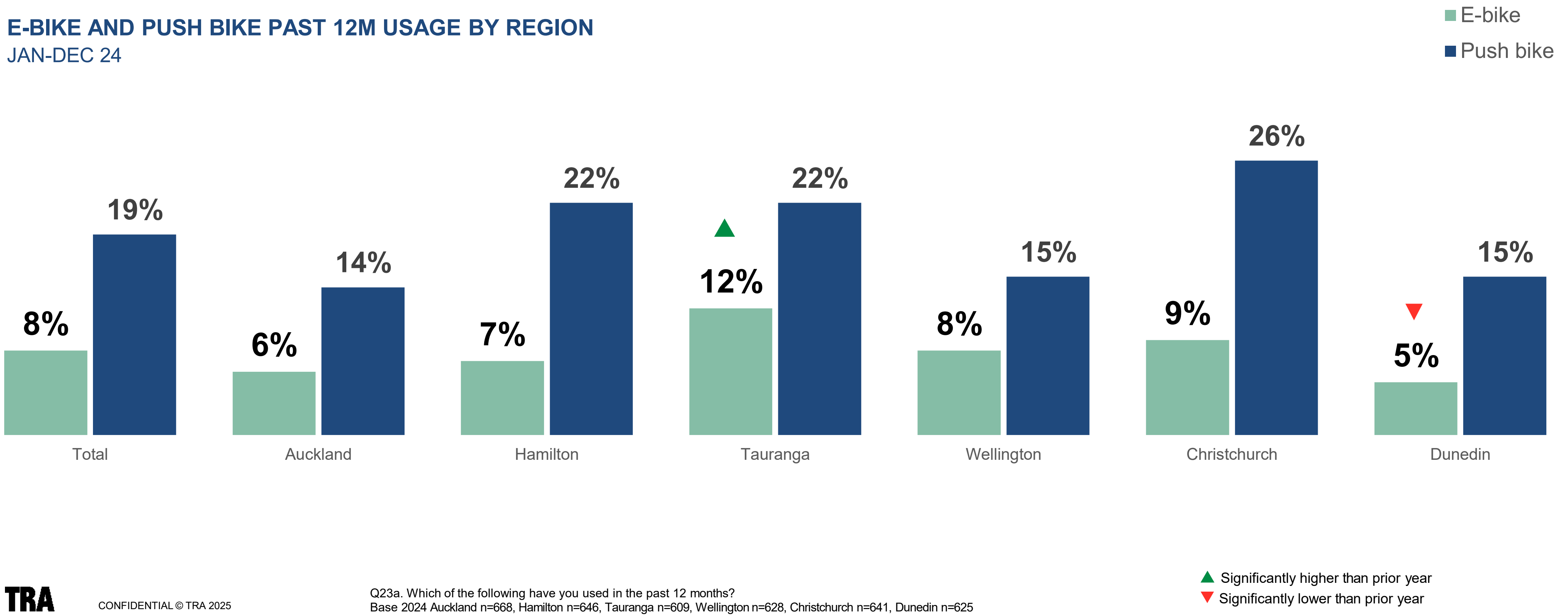
Q23a. Which of the following have you used in the past 12 months? Q24. On average, how often do you use each of the following modes of transport, for any reason
Base Total Sample 2024 n=3817, 2023 n= 3170, 2022 n=3278, 2021 n=4924, 2020 n=2267 n= 2019 n=2174, 2018 n=2115

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Regionally, e-bike users are more prevalent in Tauranga and fewer in Dunedin

By contrast, Christchurch has a higher proportion of push bike riders (1 in 4) compared to other regions surveyed.

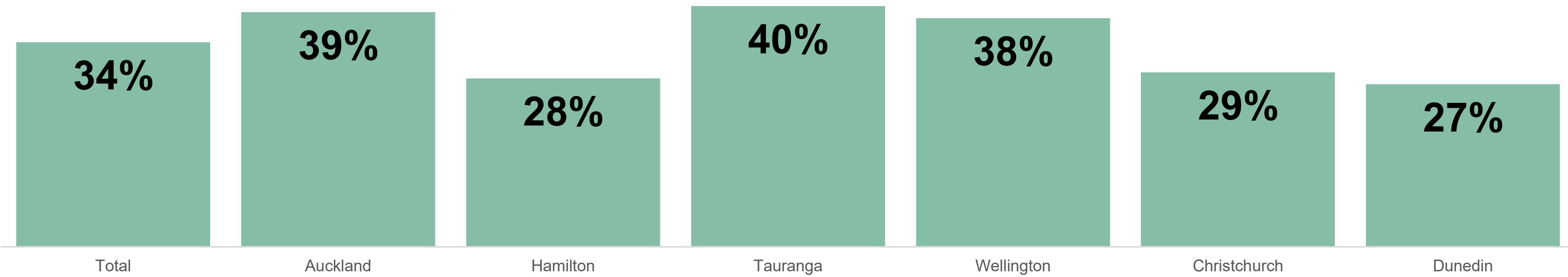
E-BIKE AND PUSH BIKE PAST 12M USAGE BY REGION
JAN-DEC 24



Q23a. Which of the following have you used in the past 12 months?
Base 2024 Auckland n=668, Hamilton n=646, Tauranga n=609, Wellington n=628, Christchurch n=641, Dunedin n=625

Among those who have cycled in the past 12 months a third have ridden an e-bike

E-BIKE USED IN PAST 12M – AMONG THOSE WHO CYCLE AT LEAST ONCE A YEAR BY REGION
JAN-DEC 24

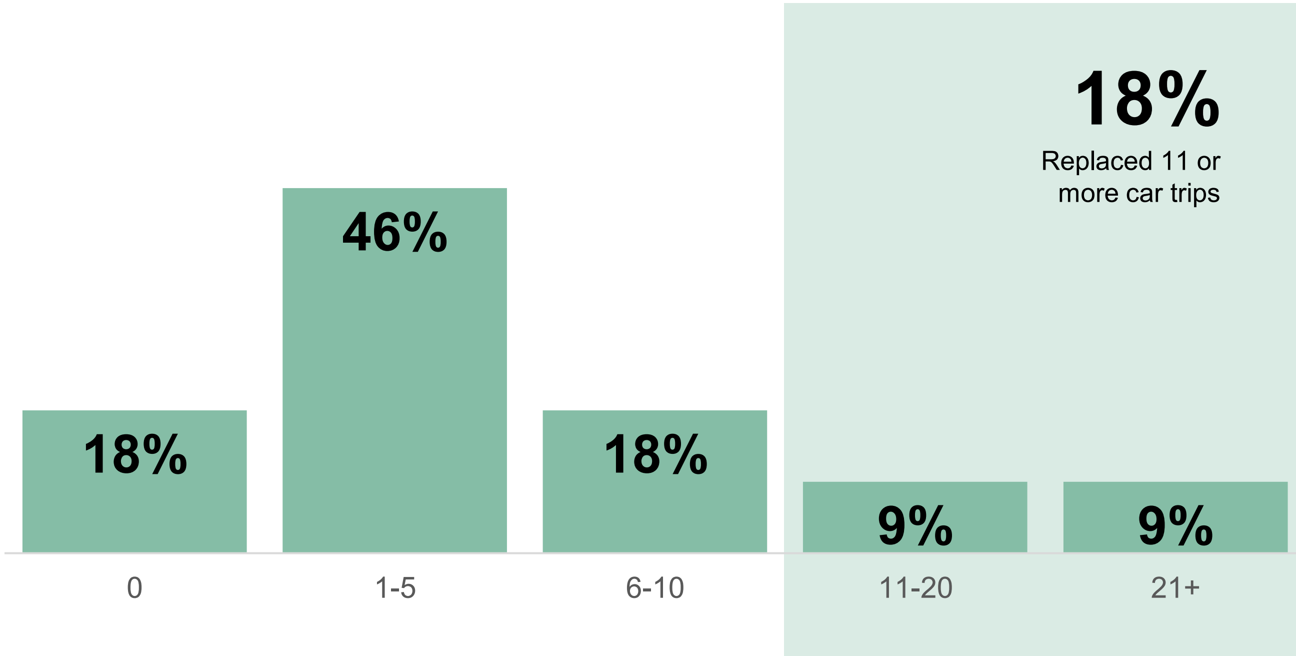


Q23a. Which of the following have you used in the past 12 months?
Base 2024 Cycled at least once a year Total 937, Auckland n=136, Hamilton n=155, Tauranga n=186, Wellington n=129, Christchurch n=207, Dunedin n=124

▲ Significantly higher than other regions
▼ Significantly lower than other regions

In a normal month, e-bike riders are replacing 6.9 car trips with e-bike journeys

NUMBER OF CAR TRIPS E-BIKE RIDERS HAVE REPLACED WITH E-BIKE JOURNEYS IN A NORMAL MONTH
OCT-DEC 24

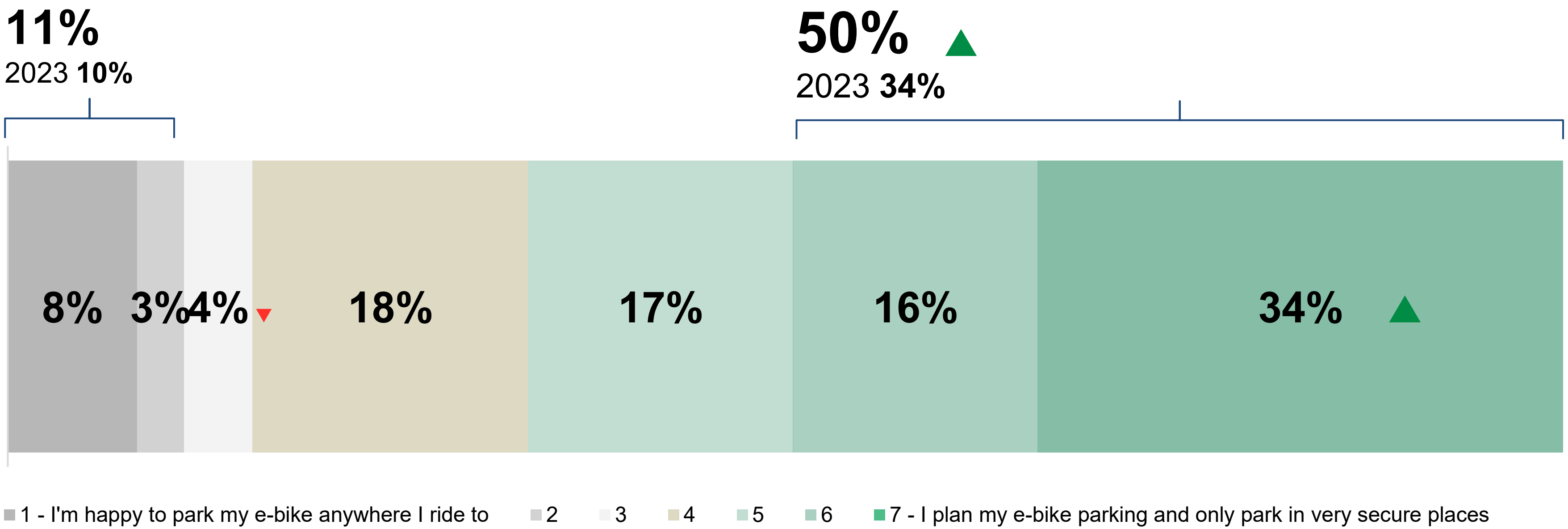


Q6xEBIKExTRIPS: On average, how many car trips do you replace with e-bike journeys in a normal month?
Base E-bike rider last 12 months 2024 n=236

Half of those who own or have access to an e-bike plan their e-bike parking and only park in very secure places

This has significantly increased from 2023.

E-BIKE PARKING CONSIDERATIONS
OCT-DEC 24



Consideration for secure e-bike parking is strongest among e-bike riders in Christchurch and Hamilton:

T2B (6-7/7) – 2024 Regions	
Christchurch	58%
Hamilton	53%
Wellington	48%
Auckland	45%
Tauranga	44%
Dunedin	39%

Q6xEBIKExPARK: On the scale below, please select which statement best represents how you think about parking your e-bike?
Base Own or have easy access to an e-bike 2024 n=669, 2023 n=109 / Regions 2024 Auckland n=110, Hamilton n=112, Tauranga n=112, Wellington n=109, Christchurch n=138, Dunedin n=88

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Urban New Zealanders are open to owning e-bikes, especially current push bike owners

INTEREST IN OWNING AN E-BIKE
JAN-DEC 24

29%

of those who don't own an e-bike are interested in owning one

40% ▲

of those who have a push bike are interested in owning an e-bike

20%

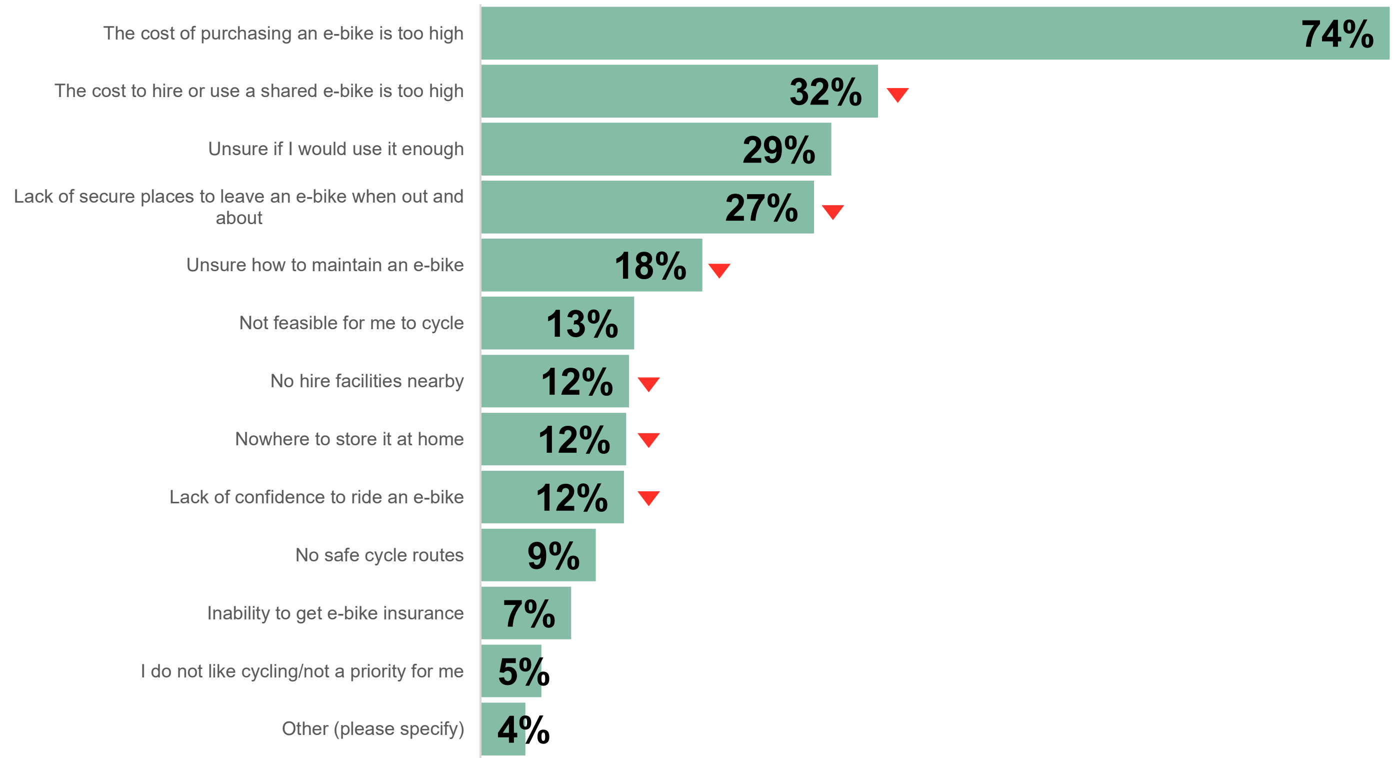
of those who do not have any type of bike are interested in owning an e-bike

Q6_EBIKE_INTEREST1: How interested are you in owning an e-bike?
Base Doesn't own or have access to a working e-bike and does not have a disability that would affect their ability to ride a bicycle Q1-Q3 2024 n= 2358, Doesn't own or have access to a working e-bike and has access to a push bike Q1-Q3 2024 n=1073, Doesn't own or have access to a working e-bike and doesn't have access to a push bike Q1-Q3 2024 n=1285

▲ Significantly higher than those who don't own push bikes
▼ Significantly lower than those who don't own push bikes

Cost remains the largest barrier to e-bike ownership

BARRIERS TO USING AN E-BIKE AMONG INTERESTED IN OWNING AN E- BIKE
JAN-DEC 24



The barrier of cost encompasses both the cost to purchase (**74%**) and cost to hire (**32%**)

▲ Significantly higher than 2023
▼ Significantly lower than 2023

Q6_EBIKE_BARRIER: What are the main barrier(s) stopping you from using an e-bike?
Base Interested in owning e-bike 2024 n=544

Perceptions of cycling

5

SUMMARY

Perceptions of cycling

Support for cycling in the community remains stable, with 68% of urban New Zealanders supportive (40% very supportive, 28% somewhat supportive). Cyclists receive social support to cycle, with 59% encouraged by family and 41% by friends.

Over half of cyclists perceive cycle lanes, road crossings, cycling to destinations with children, and reaching desired places as easy, with these perceptions unchanged since 2022.

Perceptions of safety remain stable, with 22% feeling very safe and 54% feeling at least somewhat safe cycling in their region. Cyclists feel safest in parks or domains, on quiet local roads, or on roads with lanes separated from traffic.

Safety remains a major barrier to cycling, with not feeling safe because of how people drive the strongest barrier (43%). The number of reported barriers is increasing, though motivations for cycling are also growing. Fitness (69%) and fun (61%) are still the top motivators, with cost savings and ‘me time’ becoming more prominent. The motivation of cycling to save money has been growing since 2021, except in Auckland.

Support for investment in cycling infrastructure remains relatively stable, with over half in favour. Cyclists in urban areas are generally satisfied with cycle lanes, shared paths, signage, and connectivity

The level of support for cycling in the community has remained stable

Whilst non-cyclists are less likely to be supportive than cyclists, the percentage of those who do not support cycling has remained stable since 2023 (18% not supportive among non-cyclists, and 7% not supportive among cyclists).

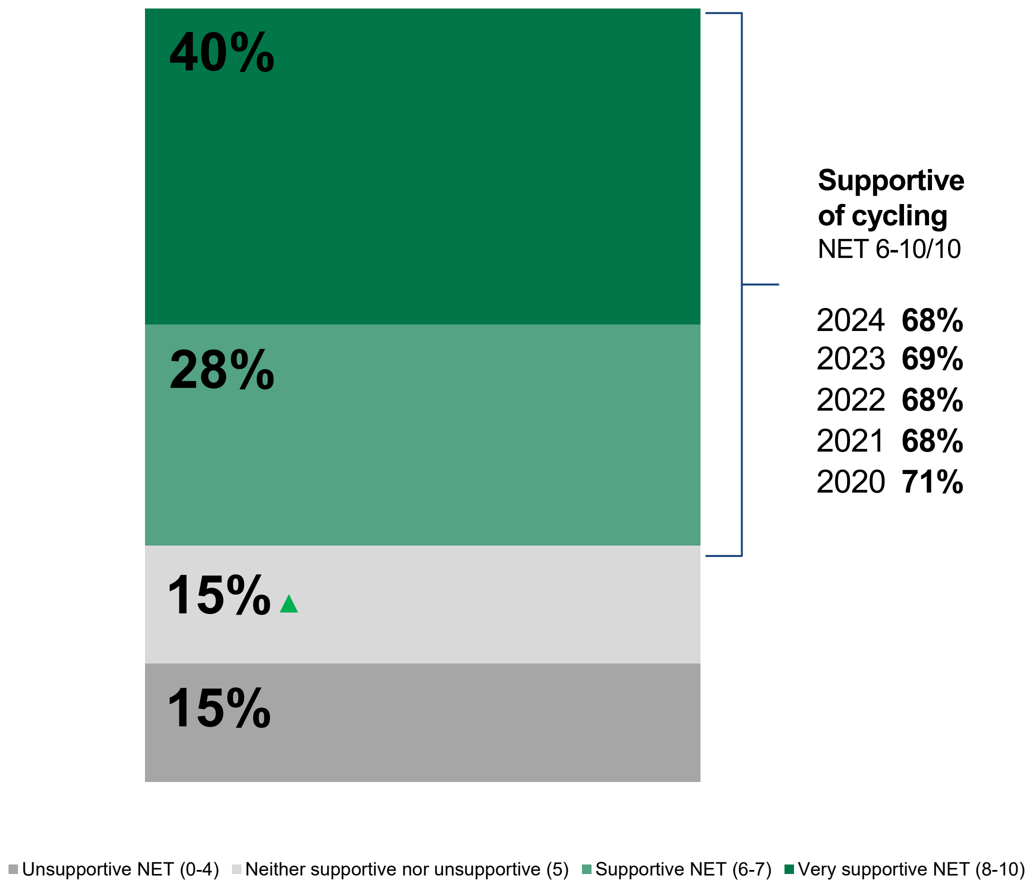
Household structure is a key demographic factors determining cycling support: support is strongest among those who are younger living without kids.

Supportive (6-10/10) - 2024 Household Structure	
Younger single or couple households without kids	72% ▲
Households with kids living at home (families)	69%
Older single or couple households	63% ▼

▲ Significantly higher than prior year
▼ Significantly lower than prior year
▲▼ Significantly higher/ lower than total

Q6cTo what degree do you support cycling in your community?
Base Total Sample 2024 n=3817, 2023 n= 3170, 2022 n= 3278 '2021 n=4942, 2020 n=2267, 2019 n=2174, 2018 n=2115

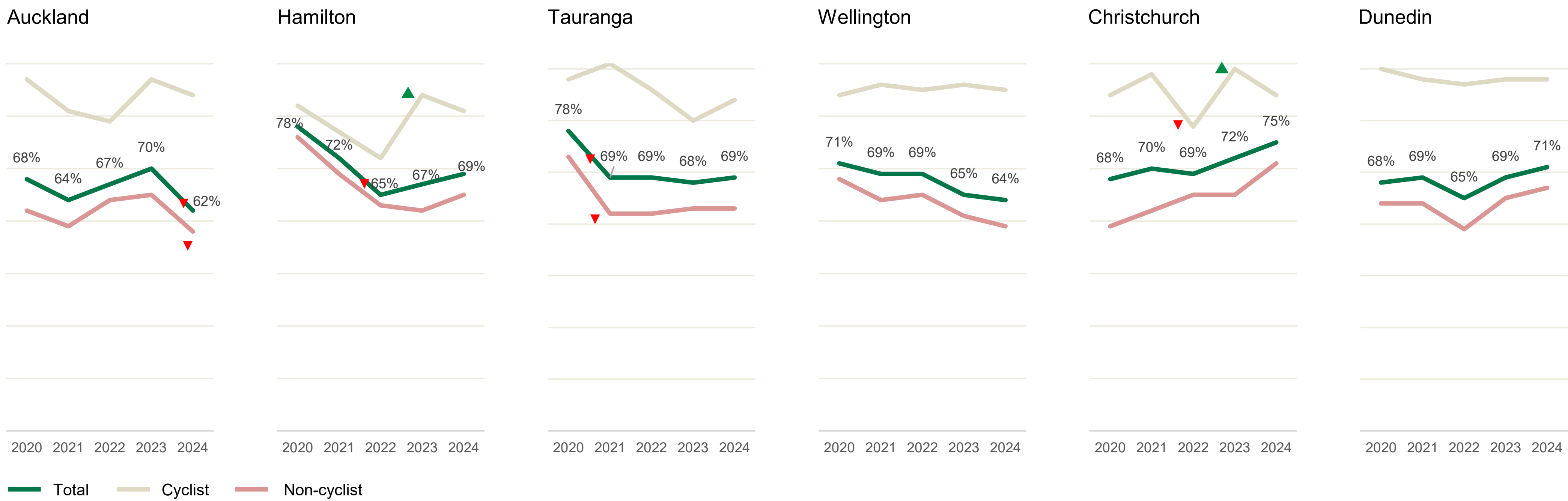
Support for cycling in your community



In 2024, Christchurch and Dunedin had the highest levels of support, and Auckland and Wellington the lowest

Support among non-cyclists has been gradually declining in Wellington.

SUPPORT OF CYCLING IN THE COMMUNITY ACROSS OVER TIME BY REGION (NET: SUPPORTIVE 6-10)



Q6c: There are varying levels of support in the community for people who choose to cycle for journeys such as traveling to work, going to shops or other activities. To what degree do you support cycling in your community?
Base: 2020 -2024 Total Auckland n=554-1144, Hamilton n=209-583, Tauranga n=204-565 Wellington n=543-1037, Christchurch n=505-1037, Dunedin n=206-558 / Cyclist: Auckland n=116-219, Hamilton n=55-167, Tauranga n=62-186 Wellington n=84-204, Christchurch n=162-334, Dunedin n=29-124 / Non-cyclist: Auckland n=238-925, Hamilton n=154-491, Tauranga n=142-423, Wellington n=422-833, Christchurch n=327-703, Dunedin n=177-501
No change to question wording and response options. Question order changed

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Social support for cycling has remained consistent

Cyclists in higher income households are more likely to feel supported by their family and friends.

Younger urban New Zealanders (18-34 years) are significantly more likely to believe that cycling improves their personal image among their peers.

SOCIAL CYCLING PERCEPTIONS - % STRONGLY AGREE / AGREE

JAN-DEC 24

Statement	JAN-DEC 24	2023	2022	2021	2020
My family encourage and support that I cycle	59%	60% ▲	54%	57%	58%
My friends encourage me to cycle	41%	40%	35% ▼	42%	38%
I believe that cycling improves my personal image to my peers	40%	41%	40%	41%	36%
I have lots of friends and family who cycle	30%	30%	28% ▼	32%	33%
At work, lots of my colleagues cycle to work	19%	17%	18%	20%	18%

First 3 statements asked only of cyclists

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Q8 - How much do you agree or disagree with each of the following statements?
Base Total Sample 2024 n=3817, 2023 n=3170, 2022 n=3278, 2021 n-2267, Cyclist only 2024 n=937, 2023 n=707, 2022 n=759, 2021 n=508, 2020 n=567
Cyclist: HHI $100k or more n=458, 18-34 years n=365

The majority of New Zealand cyclists indicate it is easy to cycle in different spaces in their community

Almost two thirds (65%) of New Zealanders find using cycling lanes in their area easy or very easy.

EASE OF CYCLING (AMONGST CYCLISTS) - % VERY EASY / EASY
JAN-DEC 24

71% Get to the place you want to go

65% Use the cycle lanes in your area

66% Bike to places with the kids *(Those with children under 15)*

57% Cross the roads in your area

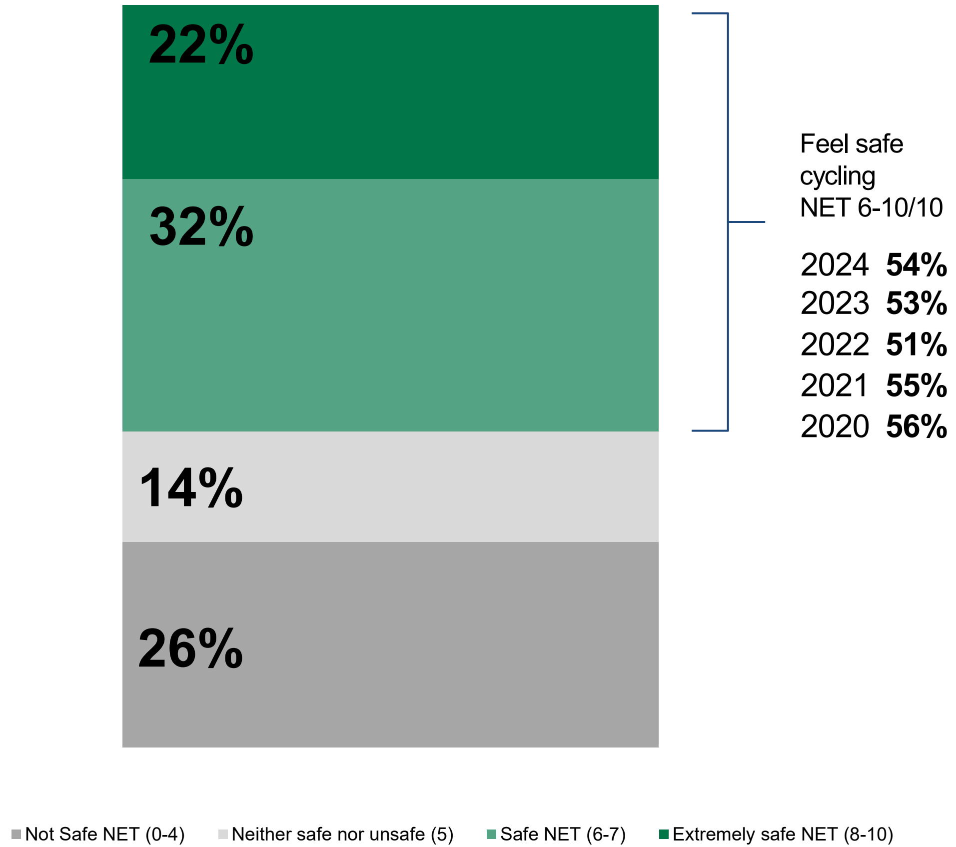
	Get to the place you want to go	Use the cycle lanes in your area	Bike to places with the kids	Cross the roads in your area
2023	**73%**	**65%**	**62%**	**61%**
2022	**70%**	**65%**	**65%**	**62%** ▲
2021	**70%**	**64%**	**60%**	**57%**
2020	**72%**	**62%**	**57%**	**57%**

Q29a: Now we'd like you to think about when you are out and about biking in your area. Using the scale below, how easy do you find it to…
Base Cyclists 2024 n=937, 2023 n= 707, 2022 n=759, 2021 n=1180, 2020 n=567, With Children under 15 2024 n=282, 2023 n=209, 2022 n=191, 2021 n=293, 2020 n=142,

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Over half of people able to cycle indicate they would feel at least somewhat safe riding a bike

PERCEPTIONS OF SAFETY – % OF PEOPLE WHO FEEL SAFE CYCLING
JAN-DEC 24



▲ Significantly higher than prior year
▼ Significantly lower than prior year

A5 - In general, how safe are you/would you be, riding a bicycle in [REGION]?
Base: Physically able to cycle 2024 n=3369, 2023 n=2,780, 2022 n=2772, 2021 n=4194, 2020 n=1962,

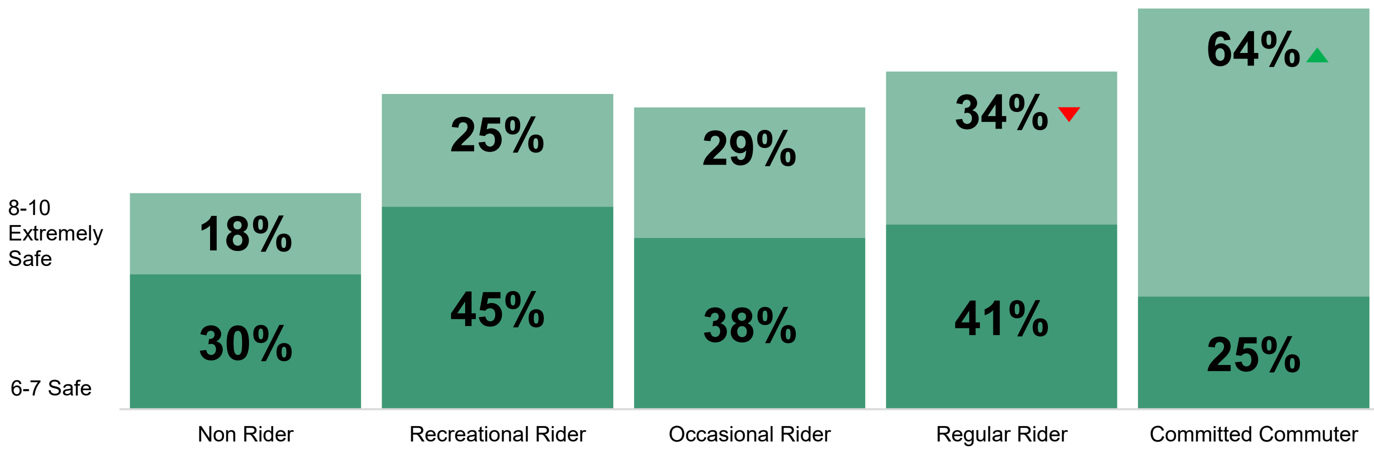
Perceptions of safety are the highest among Committed Riders and has significantly increased since 2023

Where a similar proportion of Regular Riders and Committed Riders reported feeling extremely safe when cycling in 2023 (43% and 44% respectively), 2024 has seen this diverge - Committed Riders feel a far higher degree of safety than Regular Riders.

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 2020-2024 Committed Rider n = 63-151, Regular Rider n=119-304, Occasional Rider n=218-383, Recreational n= 93-181, Non Rider n=1469-3175

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

2024 NET: 6-10 Safe	49%	70%	67%	75%	89% ▲

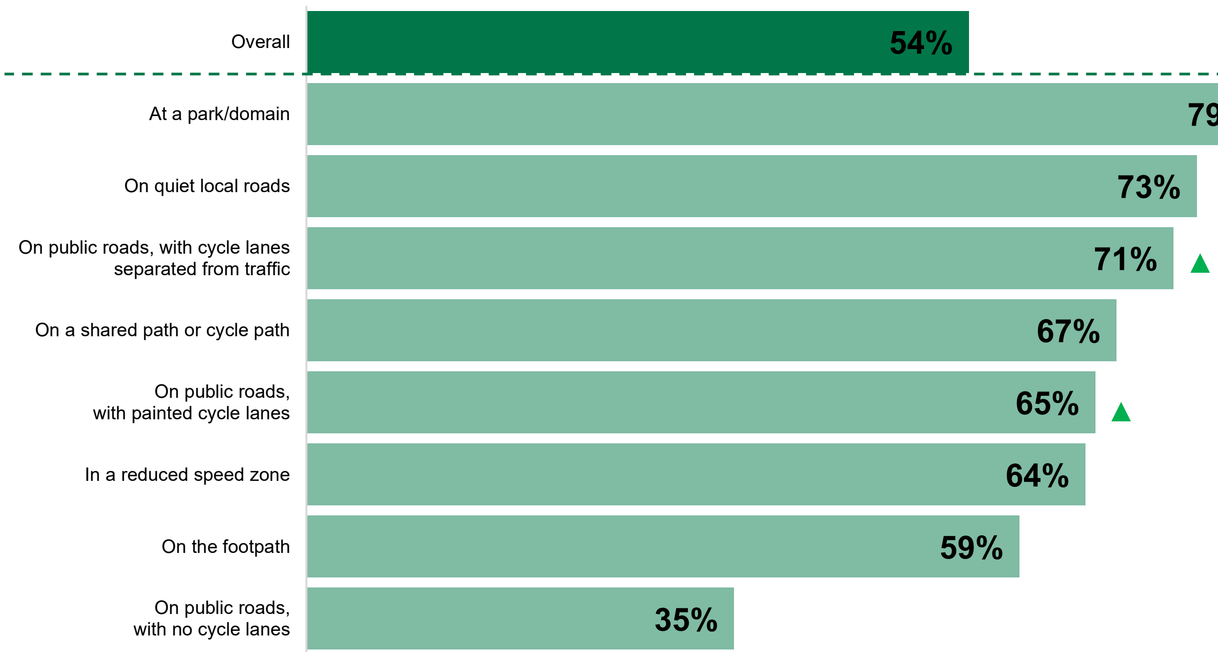


▲ Significantly higher than prior year
▼ Significantly lower than prior year

Cyclists feel safest cycling in parks, on quiet local roads and with separated cycle lanes

Significant increases in feelings of safety on roads with separated cycle lanes and painted cycle lanes was seen compared to 2023.

PERCEPTIONS OF CYCLING SAFETY – % OF PEOPLE WHO FEEL SAFE CYCLING IN DIFFERENT LOCATIONS (NET SAFE 6-10/10)



	2023	2022	2021	2020
Overall	53%	51% ▼	55%	56%
At a park/domain	78% ▲	74% ▼	77%	78%
On quiet local roads	72% ▲	69%	71%	73%
On public roads, with cycle lanes separated from traffic	67%	66% ▼	68%	69%
On a shared path or cycle path	67% ▲	63% ▼	68%	68%
On public roads, with painted cycle lanes	61%	59% ▼	63%	64%
In a reduced speed zone	63%	61%	63%	65%
On the footpath	58%	57% ▼	60%	58%
On public roads, with no cycle lanes	35%	36%	37%	37%

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 2024 n=3369, 2023 n=2780, 2022 n=2772, 2021 n=4194, 2020 n=1962, 2019 n=1836
No change to question wording and response options. Question order changed

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Over half of New Zealanders support investment in cycle lanes

SUPPORT OF INVESTMENT IN INFRASTRUCTURE - % STRONGLY AGREE / AGREE
JAN-DEC 24

58% ▼

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

2023 61% ▲
2022 57%
2021 59%
2020 60%

55%

Investing in cycle lanes is important because it gets people outside exercising

2023 56%
2022 55%
2021 56% ▼
2020 59%

59%

The opening of cycleways/paths has encouraged me to cycle more (CYCLISTS ONLY)

2023 60% ▲
2022 53%
2021 56%
2020 56%

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Q7 - Now please think about walking and cycling in general. How much do you agree or disagree with each of the following statements?
Base Total Sample; 2024 n=3817, 2023 n= 3170, 2022 n=3278, 2021 n=4924, 2020 n=2267, Cyclists Only 2024 n=937, 2023 n=707, 2022 n=759, 2021 n=1180, 2020 n=567

Across urban regions over half of cyclists are satisfied with the quality of bicycle lanes, shared use paths, signage and wayfinding, and the continuity and connectivity of cycle lanes and paths

CYCLIST SATISFACTION WITH CYCLING INFRASTRUCTURE – % SATISFIED (5-7/7) BY REGION

JAN-DEC 24

	The quality of bicycle lanes	The quality of shared use paths	Space for bicycles on trains*	Bike racks on buses*	Bicycle parking at public transport stops / stations	Bicycle parking generally	Signage and wayfinding	The continuity and connectivity of cycle lanes and paths
Overall	65% ▼	68%	32%	47%	47%	50% ▼	66%	60%
Auckland	69%	73%	50% ▼	50%	52%	54% ▼	75%	61%
Hamilton	73%	72%	29%	35%	41% ▼	55%	70%	59%
Tauranga	70%	63%	26%	39%	37%	52%	59%	57%
Wellington	56%	63%	43%	51%	62%	56%	71% ▲	58%
Christchurch	65% ▼	70%	20%	48%	42%	43% ▼	60%	62%
Dunedin	64%	71%	25%	54%	44%	51%	63%	60%

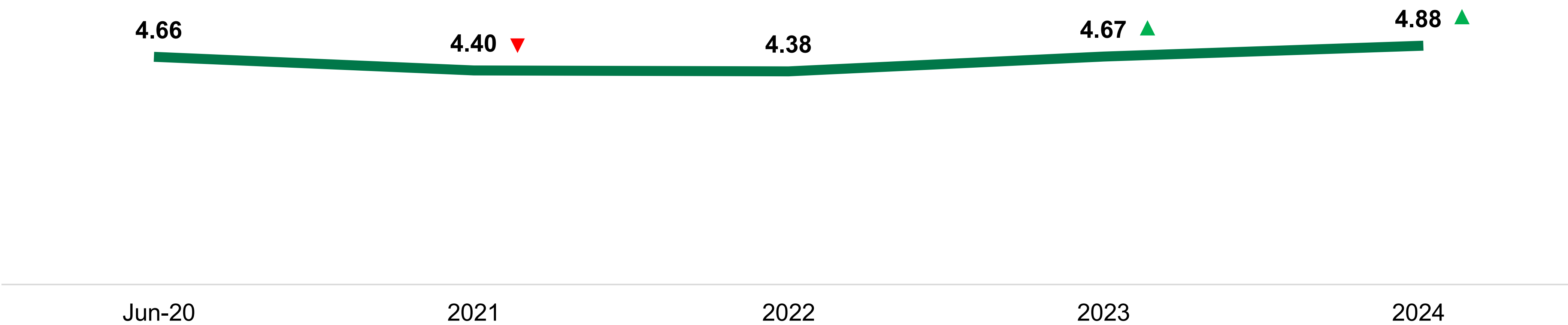
Q29b - Now please think about cycling infrastructure in [REGION].How satisfied are you with…?
Base Cyclists 2024 Overall n=937, Auckland n=136, Hamilton n=155, Tauranga n=186, Wellington n=129, Christchurch n=207, Dunedin n=124
*Not available in all regions

▲ Significantly higher than 2023
▼ Significantly lower than 2023

Those who are able to cycle face multiple factors holding them back from cycling as much as they otherwise would, and this number has been increasing since 2022

On average, those able to cycle reported 4.88 barriers stopping them from cycling more than they are currently.

AVERAGE NUMBER OF BARRIERS TO CYCLING OVER TIME (OUT OF 19)

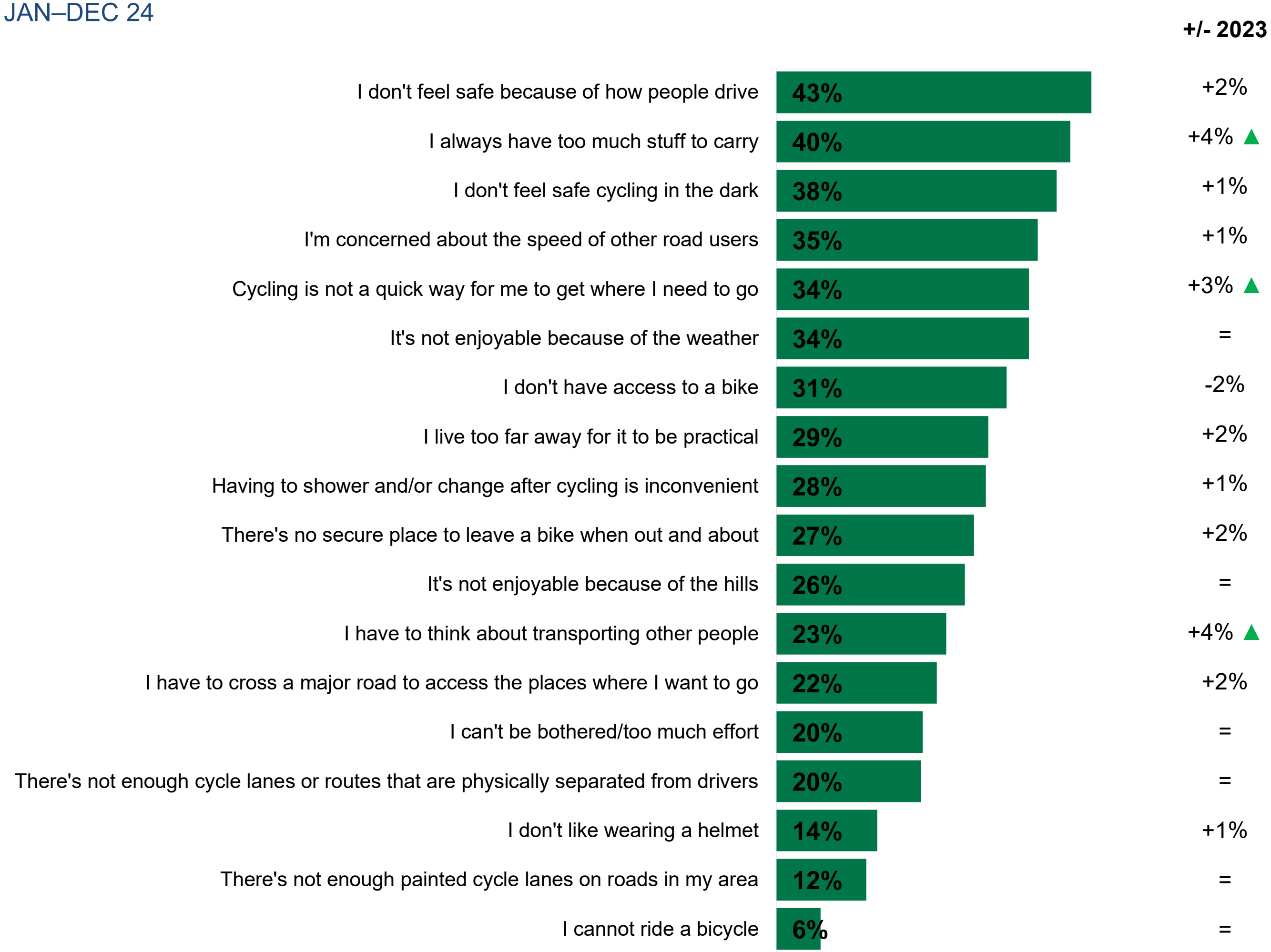


Q11b: Sometimes people tell us there are things that stop them from cycling as much as they otherwise would.
When it comes to cycling in [REGION], which of these statements, if any, apply to you?
Base Physically able to cycle 2024 n=3369, 2023 n=2076, 2022 n=2772, 2021 n=4194, 2020 n=1962

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Not feeling safe because of how people drive remains the top barrier to cycling

CYCLING BARRIERS
JAN–DEC 24



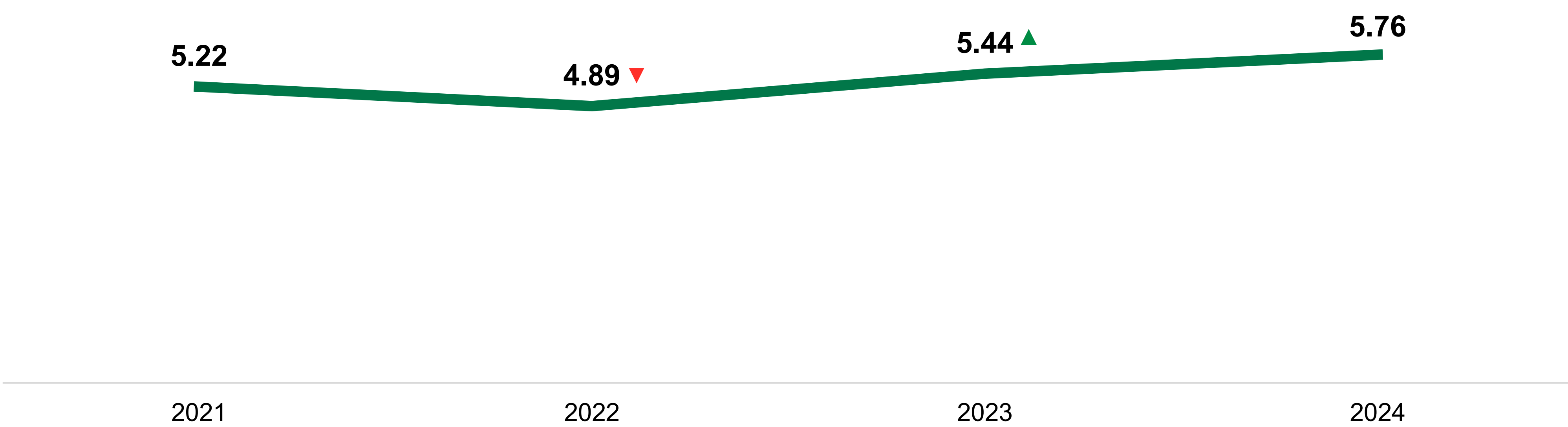
▲ Significantly higher than prior year
▼ Significantly lower than prior year

Q11b: Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling in [REGION], which of these statements, if any, apply to you?
Base Physically able to cycle 2024 n=3369, 2023 n=2076

However, the average number of motivations to cycle is also increasing

Cyclists are motivated to bike by a range of reasons. In 2024 people reported on average 5.76 reasons for why they choose to cycle.

AVERAGE NUMBER OF MOTIVATIONS TO CYCLING OVER TIME (OUT OF 19)



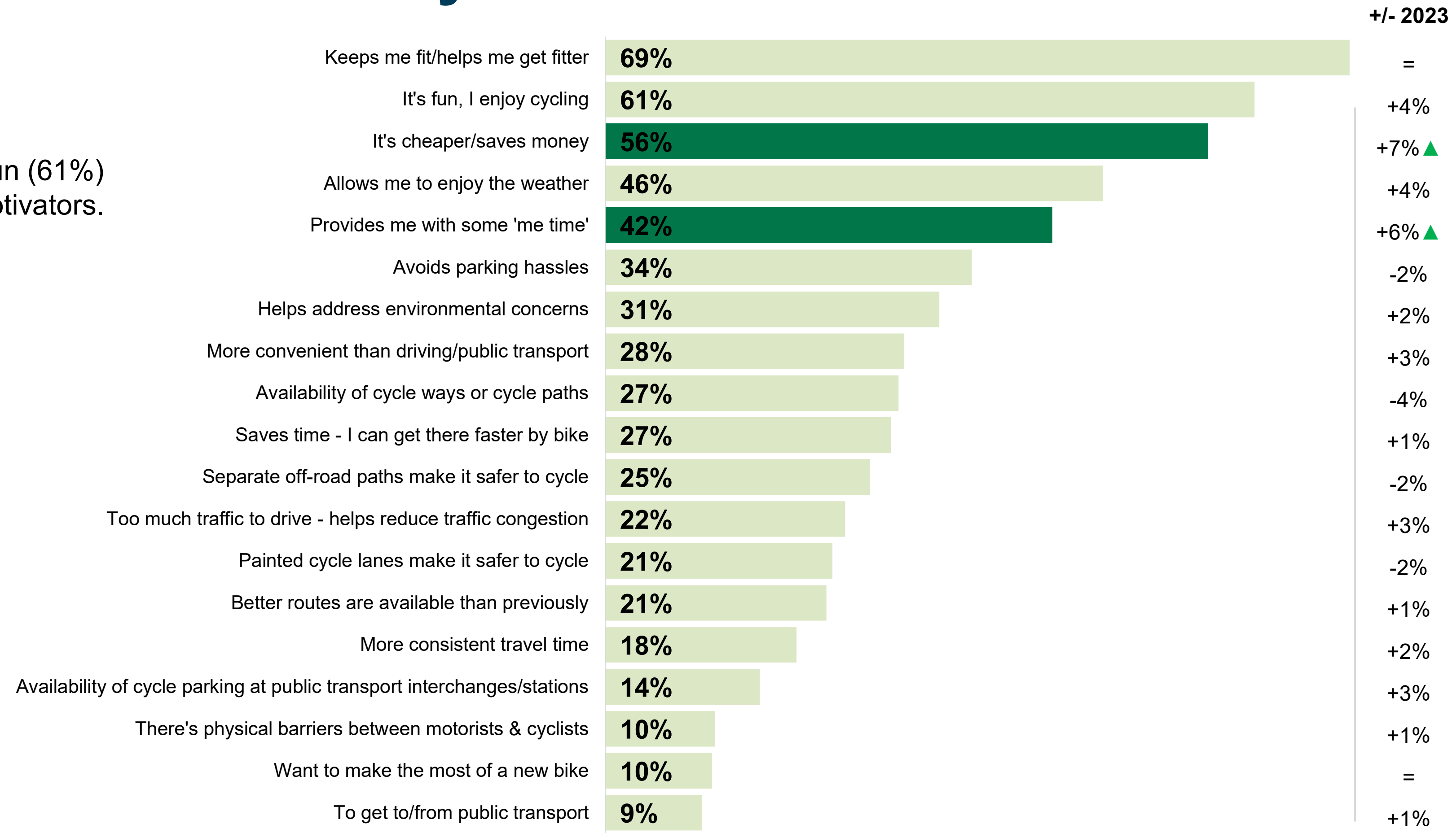
▲ Significantly higher than prior year
▼ Significantly lower than prior year

Q11a. From the list below, what are the key reasons you choose to cycle?
Base Cyclists 2024 n=684, 2023 n=707, 2022 n=759, 2021 n=950

Cost saving and ‘me time’ have become more prominent motivators for cyclists

CYCLING MOTIVATORS
JAN–DEC 24

However fitness (69%) and fun (61%) continue to be the top two motivators.



Q11a. From the list below, what are the key reasons you choose to cycle?
Base Cyclists 2024 n=684, 2023 n=707

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Cycling being cheaper / saving money as a motivator for cycling has been growing, and is particularly evident in Christchurch

CYCLING MOTIVATOR “IT’S CHEAPER/ IT SAVES MONEY”
JAN–DEC 24

	2021	2022	2023	2024
Total	41%	45%	49%	56% ▲
Auckland	32%	34%	42%	33%
Hamilton	45%	40%	47%	51%
Tauranga	39%	43%	39%	49%
Wellington	40%	41%	49%	59%
Christchurch	48%	56%	60%	70% ▲
Dunedin	46%	49%	47%	60%

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Q11a. From the list below, what are the key reasons you choose to cycle?
Base Cyclists 2024 n=684, 2023 n=707, 2022 n=759, 2021 n=950. Auckland n=91-172, Hamilton n=119-135, Tauranga n=131-145, Wellington n=84-159, Christchurch n=152-267, Dunedin n=86-97

A closer look at micromobility

6

SUMMARY

A closer look at Micromobility behaviour

Almost 1 in 4 (24%) of urban New Zealanders now own or have access to an e-scooter, mostly through borrowing or hiring.

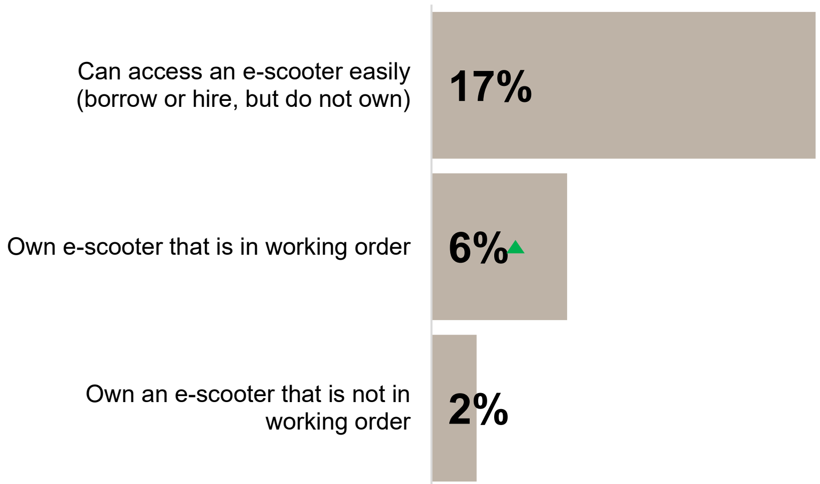
Along with an increase in ownership and access - both weekly and annual use of e-scooters is at its highest point since measuring micromobility in this monitor began in 2019, both increasing significantly in 2024. 5% of urban New Zealanders report using an e-scooter once a week.

E-scootering is more prevalent among Christchurch residents than in other urban centres (17%) and least prevalent in Wellington (11%) and Dunedin (11%).

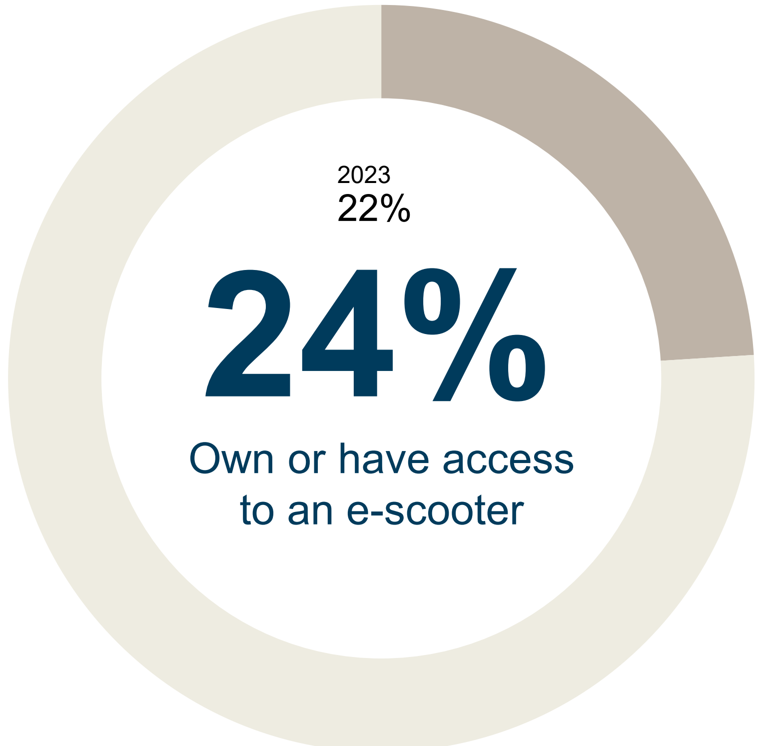
Almost a quarter of urban New Zealanders own or have access to an e-scooter

Nearly 1 in 5 (17%) have access to an e-scooter by borrowing or hiring, and 8% own an e-scooter.

Ownership of an e-scooter in working order is significantly higher compared to last year.



ACCESS OR OWNERSHIP OF E-SCOOTERS
JAN-DEC 24

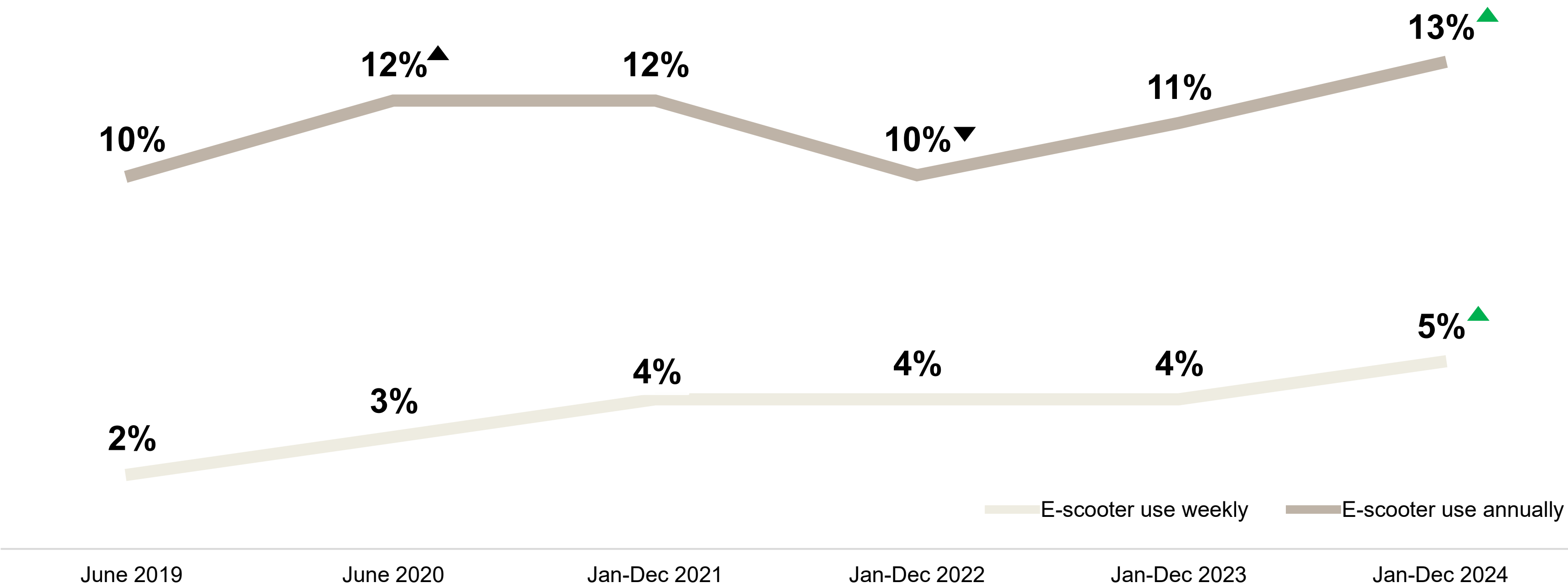


Q2B: Do you own or have access to an e-scooter you could easily use?
Base Physically able to e-scooter 2024 n=3426, 2023 n= 2126

▲ Significantly higher than prior year
▼ Significantly lower than prior year

E-scooter use continues to rise. Over 1 in 10 use an e-scooter annually – the highest recorded

E-SCOOTER USAGE OVER TIME – TOTAL SAMPLE



Among those who own their own e-scooter 38% are using it weekly.

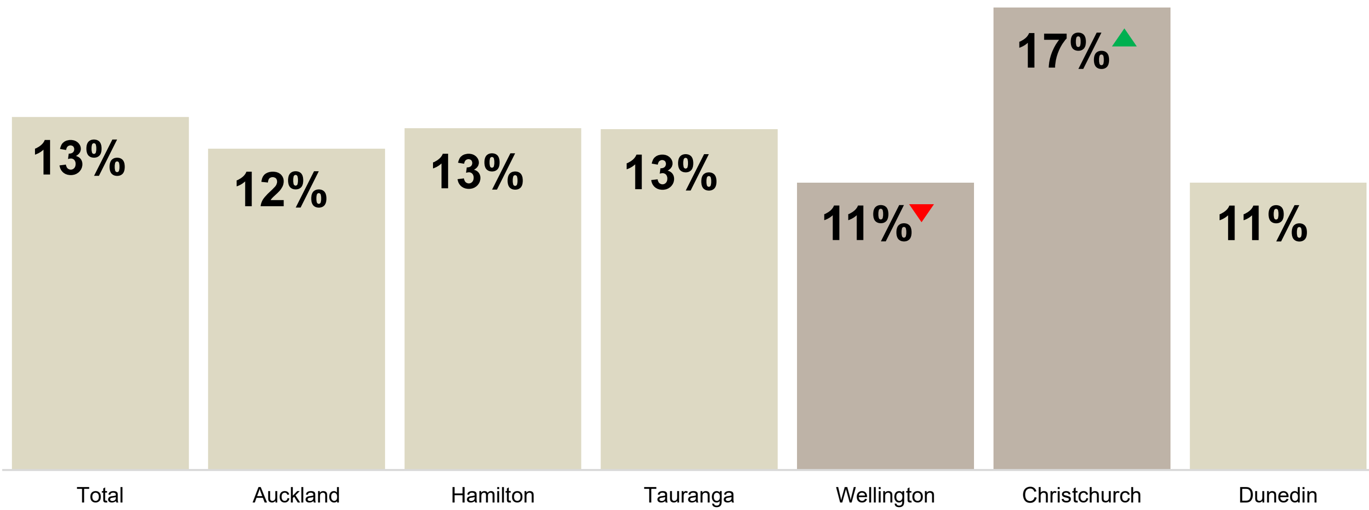
Among those who have access to an e-scooter (hire or borrow), 13% ride weekly.

Q23a. Which of the following have you used in the past 12 months? Q24. On average, now often do you use each of the following modes of transport, for any reason
Base Total Sample 2024 n=3817, 2023 n= 3170, 2022 n=3278, 2021 n=4924, 2020 n=2267, 2019 n=2174
2024 Own working e-scooter n=233, Access to working e-scooter (hire/borrow) n=638

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Christchurch has significantly more e-scooter use than the other regions

E-SCOOTER PAST 12M USAGE BY REGION
JAN-DEC 24



Nearly 1 in 5 (17%) of Christchurch residents have used an e-scooter in the last 12 months, a significant increase since 2023.

E-scooter usage has declined in Wellington with just over 1 in 10 (11%) riding an e-scooter in the last 12 months.

Q23a. Which of the following have you used in the past 12 months?
Base 2024 Auckland n=668, Hamilton n=646, Tauranga n=609, Wellington n=628, Christchurch n=641, Dunedin n=625

▲ Significantly higher than prior year
▼ Significantly lower than prior year

Perceptions of Micromobility

OCT 24 - JUN 25*

7

*Note that Section 7 Perceptions of Micromobility has been updated with Q1 and Q2 2025 data as these questions were only in the monitor for Q4 2024 and the base sizes needed to be large enough for reporting.

SUMMARY

Perceptions of micromobility

Over half of New Zealanders (56%) support e-scootering in their community, significantly lower than support for walking (90%) and cycling (68%).

The main reasons for e-scootering are fun (49%) and efficiency (41%), with a third (34%) using e-scooters when walking is too far.

E-scootering is enabling trips that might not have otherwise been made, with 49% reporting such experiences in the past year, for both functional (91%) and recreational (42%) purposes.

Around half of pedestrians (47%) feel unsafe sharing spaces with e-scooters. Their primary concerns are e-scooter speed (79%) and riding close to pedestrians (72%). Half (53%) of pedestrians report having an interaction with an e-scooter rider in the past year involving a collision (5%), near miss (29%), or being startled (38%).

Among e-scooter riders, three quarters (78%) feel safe when riding. However, 44% report experiencing a crash or near miss in the past year. 42% report always wearing a helmet when riding. However, those who own an e-scooter are significantly more likely to say they do this (69%).

Note that Section 7 Perceptions of Micromobility has been updated with Q1 and Q2 2025 data as these questions were only in the monitor for Q4 2024 and the base sizes needed to be large enough for reporting.

Over half of New Zealanders are supporters of e-scooter use in their communities

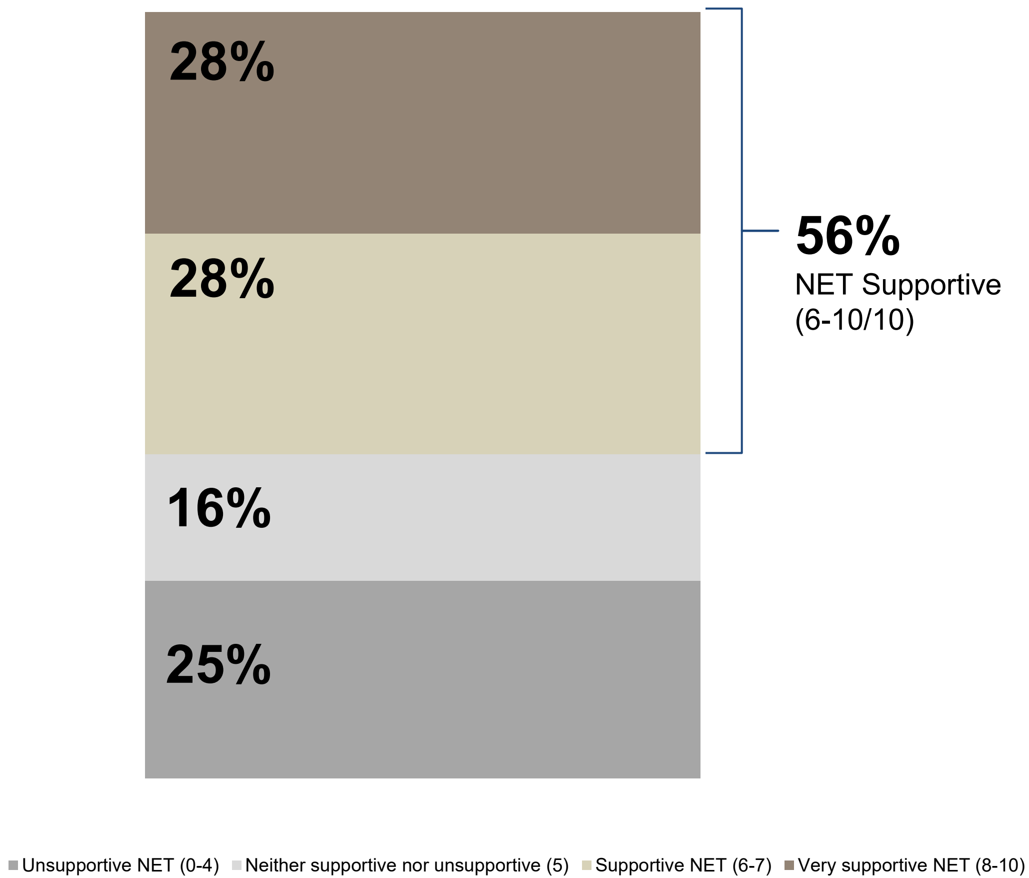
However, 1 in 4 New Zealanders (25%) are not supportive.

Compared to other active modes, community support for e-scootering is significantly lower

90%
are supportive of walking in their community (6-10/10)

68%
are supportive of cycling in their community (6-10/10)

SUPPORT FOR E-SCOOTERING IN COMMUNITY
OCT 24 - JUN 25

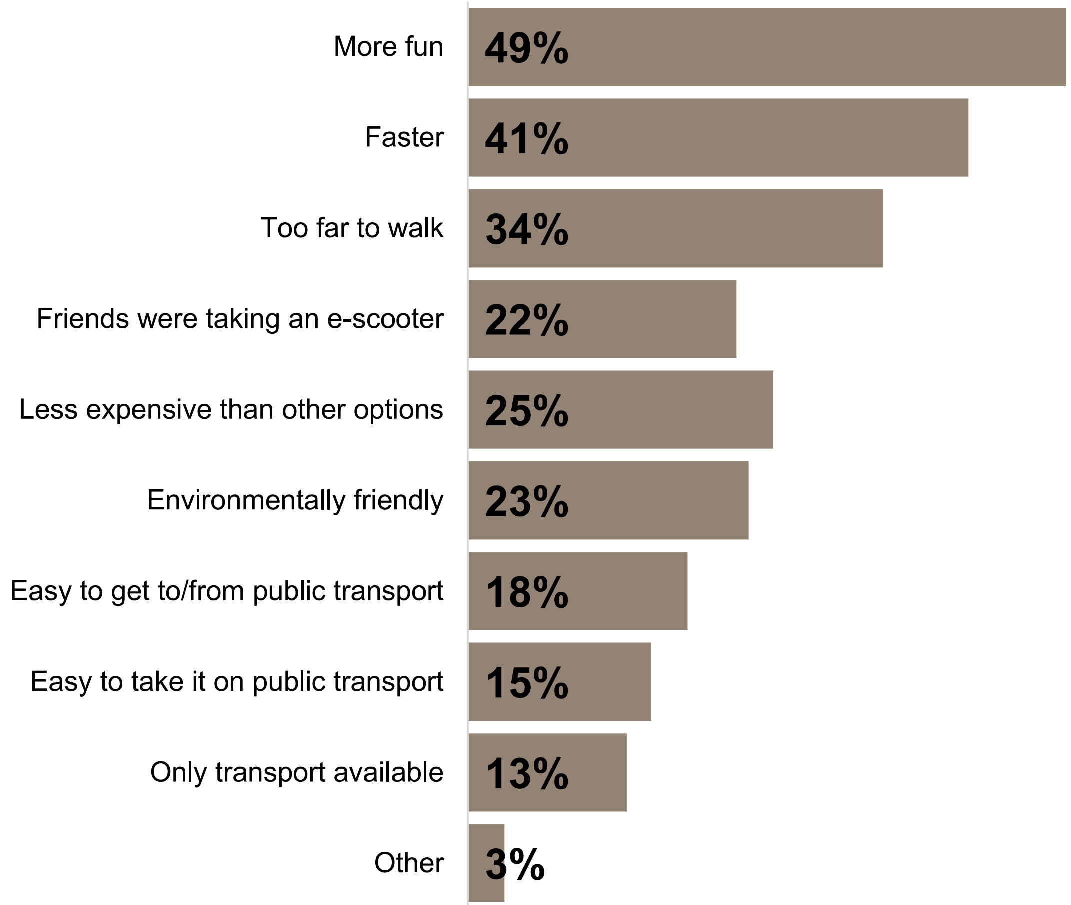


ESQ16. Now thinking about e-scooters and people who choose to use e-scooters for journeys such as travelling to work, going to shops or other activities. To what degree do you support e-scooting in your community? Q6c: There are varying levels of support in the community for people who choose to cycle for journeys such as travelling to work, going to shops or other activities. To what degree do you support cycling in your community? Q6dx1: Now thinking about walking and people who choose to walk for journeys such as travelling to work, going to shops or other activities. To what degree do you support walking in your community?
Base Q4 2024, Q1 and Q2 2025 n=2887

Fun and efficiency are the biggest motivators for e-scooter use

Over half of e-scooter riders (52%) say that fun is one of the main reasons they choose to e-scooter. A faster way to travel (43%) and when trips are too far to walk (34%) are also main reasons for riders.

MAIN REASONS PEOPLE CHOOSE TO E-SCOOTER – AMONG THOSE WHO USED E-SCOOTER IN LAST 12 MONTHS
OCT 24 - JUN 25



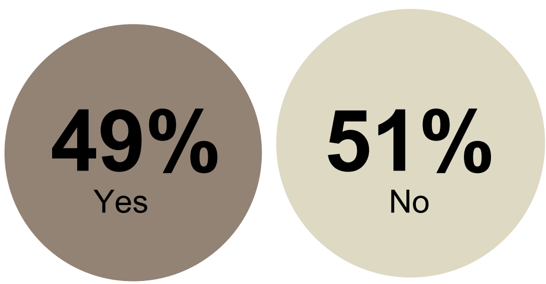
ESQ1. Thinking about your most recent e-scooter trip, what were the **main** reasons you chose to use an e-scooter for that trip?
Base: E-scooters Q4 2024, Q1 and Q2 2025 n=431

New Zealanders are using e-scooters to facilitate a wide array of trips that they wouldn't have done otherwise

91% made trips that had a functional purpose. Whilst 4 in 10 made trips for fun, fewer than 1 in 10 (8%) reported 'just for fun' only.

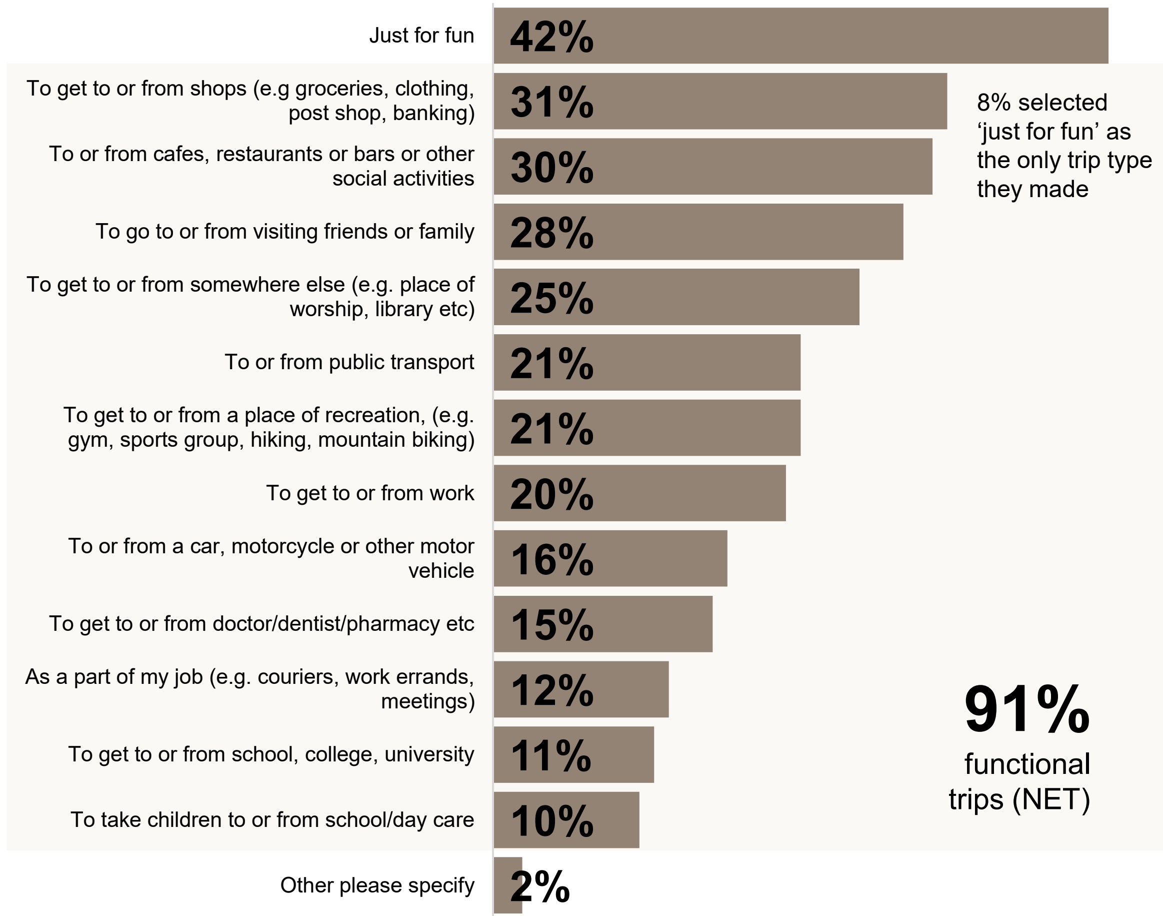
IN THE LAST 12 MONTHS HAVE YOU MADE AN E-SCOOTER TRIP YOU WOULDN'T HAVE OTHERWISE MADE - AMONG THOSE WHO USED AN E-SCOOTER IN LAST 12 MONTHS

OCT 24 - JUN 25



WHAT TRIPS HAVE YOU MADE ON AN E-SCOOTER THAT YOU OTHERWISE WOULDN'T HAVE DONE - AMONG THOSE WHO MADE AN E-SCOOTER TRIP THEY WOULDN'T HAVE DONE OTHERWISE

OCT 24 - JUN 25

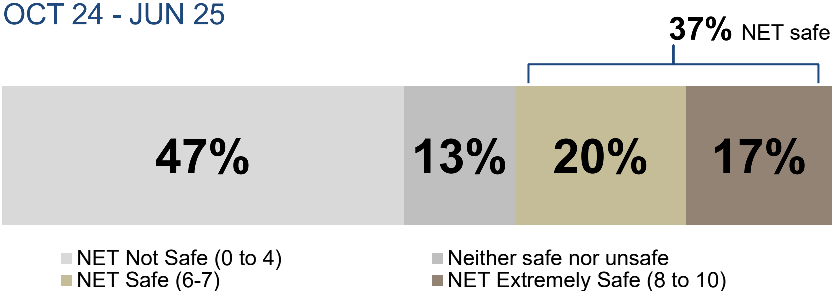


ESQ2a. In the last 12 months, have you ridden an e-scooter to make a trip that you otherwise wouldn't have made? ESQ2b Which of the following trips have you made on an e-scooter that you wouldn't otherwise have made?
Base: E-scooters Q4 2024, Q1 and Q2 2025 n=431, E-scooters who have made a trip they otherwise wouldn't have n=237

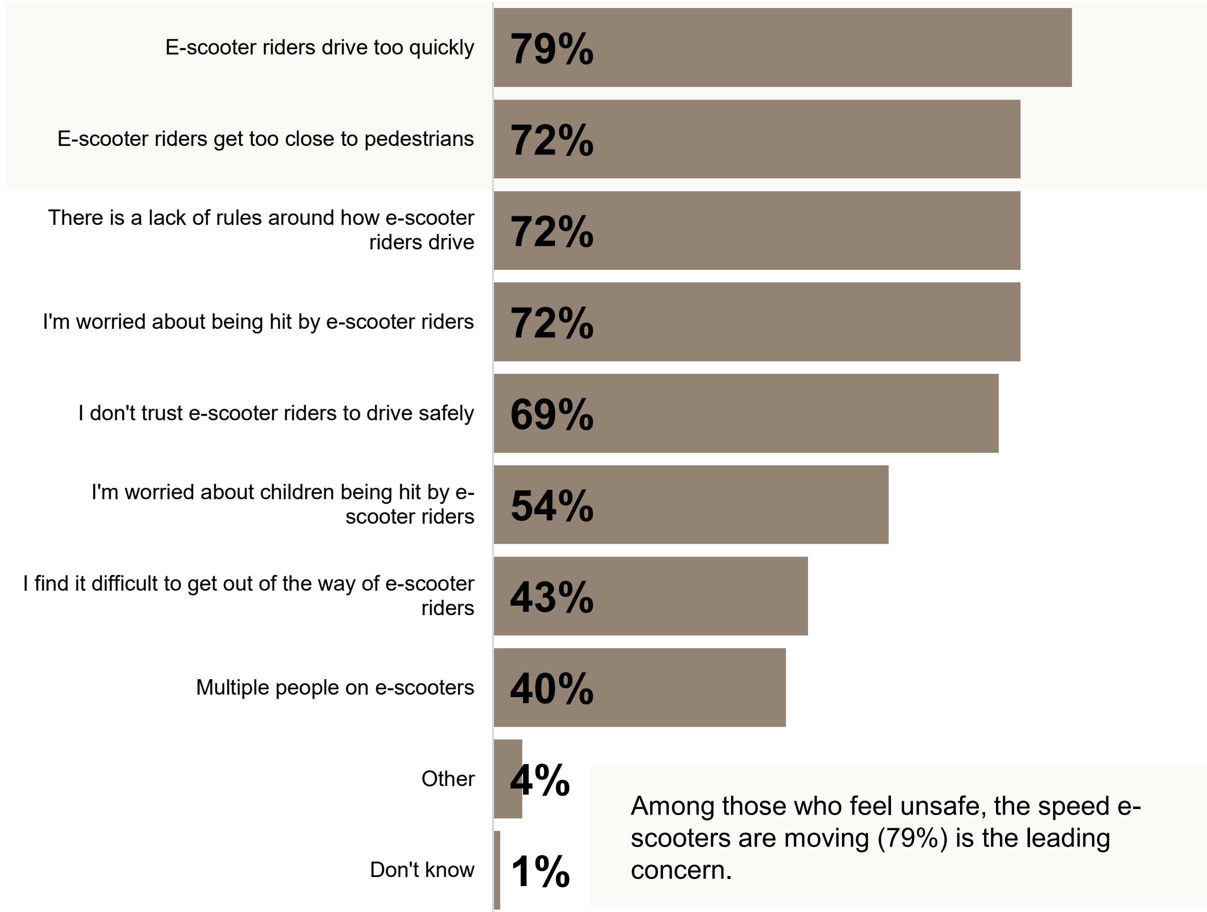
But e-scooter use can make pedestrians on shared spaces feel unsafe

This is especially true for older New Zealanders 55+ where almost 2 in 3 of them (64%) report feeling unsafe sharing spaces with e-scooter users.

HOW SAFE DO YOU FEEL WHEN SHARING SPACE WITH E-SCOOTERS
OCT 24 - JUN 25



REASONS NEW ZEALANDERS FEEL UNSAFE AROUND E-SCOOTERS – AMONG THOSE WHO FEEL UNSAFE SHARING SPACE WITH E-SCOOTERS
OCT 24 - JUN 25



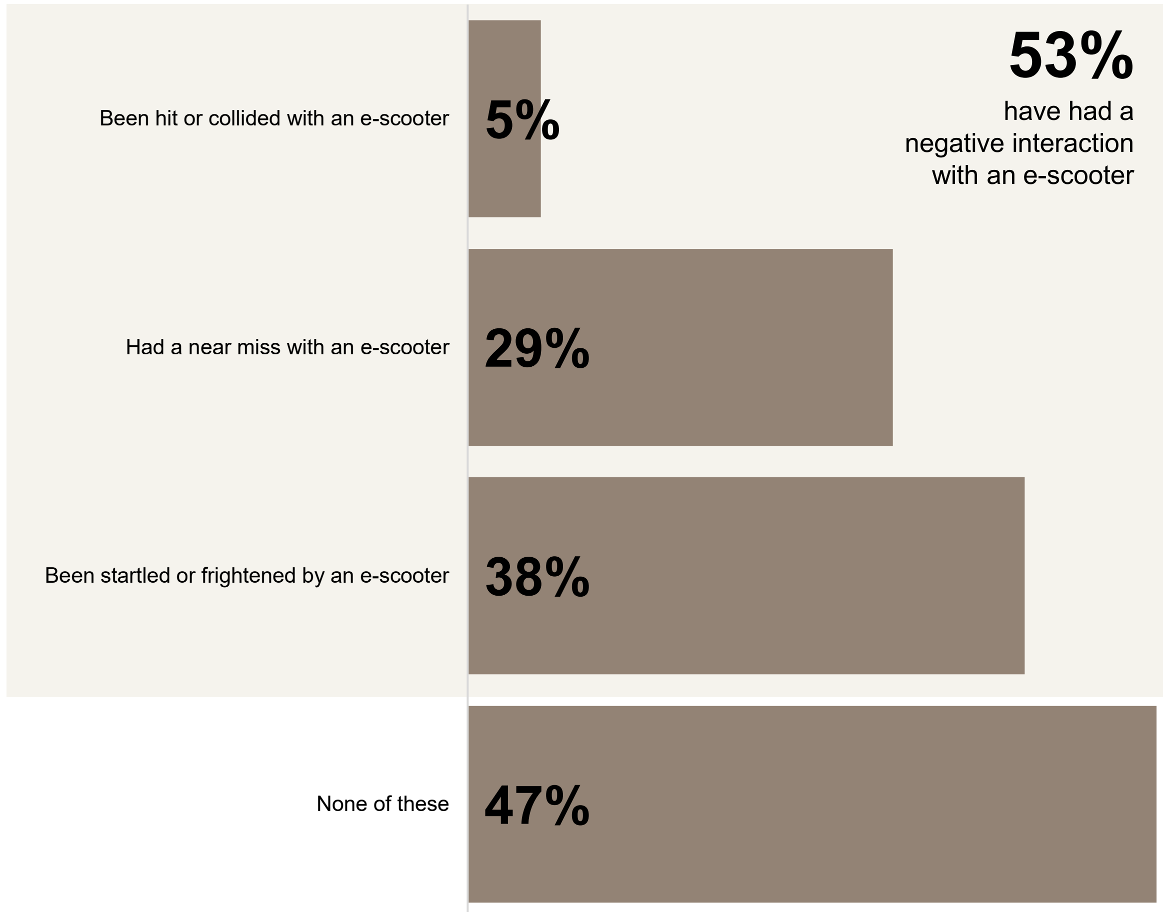
Among those who feel unsafe, the speed e-scooters are moving (79%) is the leading concern.

ESQ13a When e-scooters are sharing footpaths and other pedestrian areas (e.g. outdoor malls and squares) that you are walking on, how safe or unsafe do you feel? ESQ13b In what ways do you feel unsafe?
Base: Q4 2024, Q1 and Q2 2025 n=2887, aged 55+ n=694. Those who feel unsafe 0-4 n=1198

This is informed by experience – half of New Zealanders have had a negative interaction with an e-scooter

In line with usage rates of e-scooters across urban regions, people from Christchurch were the most likely to indicate they have had a negative interaction with an e-scooter (62%) – significantly more than the national average.

PEDESTRIAN EXPERIENCES IN THE LAST 12 MONTHS
OCT 24 - JUN 25



ESQ14. As a pedestrian, in the last 12 months, have you ...?
Base: Q4 2024, Q1 and Q1 2025 n=2887, Christchurch n=481

The majority of e-scooter users generally feel safe when riding

The main reasons for feeling safe are confidence in riding ability and riding in areas with no cars (marked lanes, footpaths).

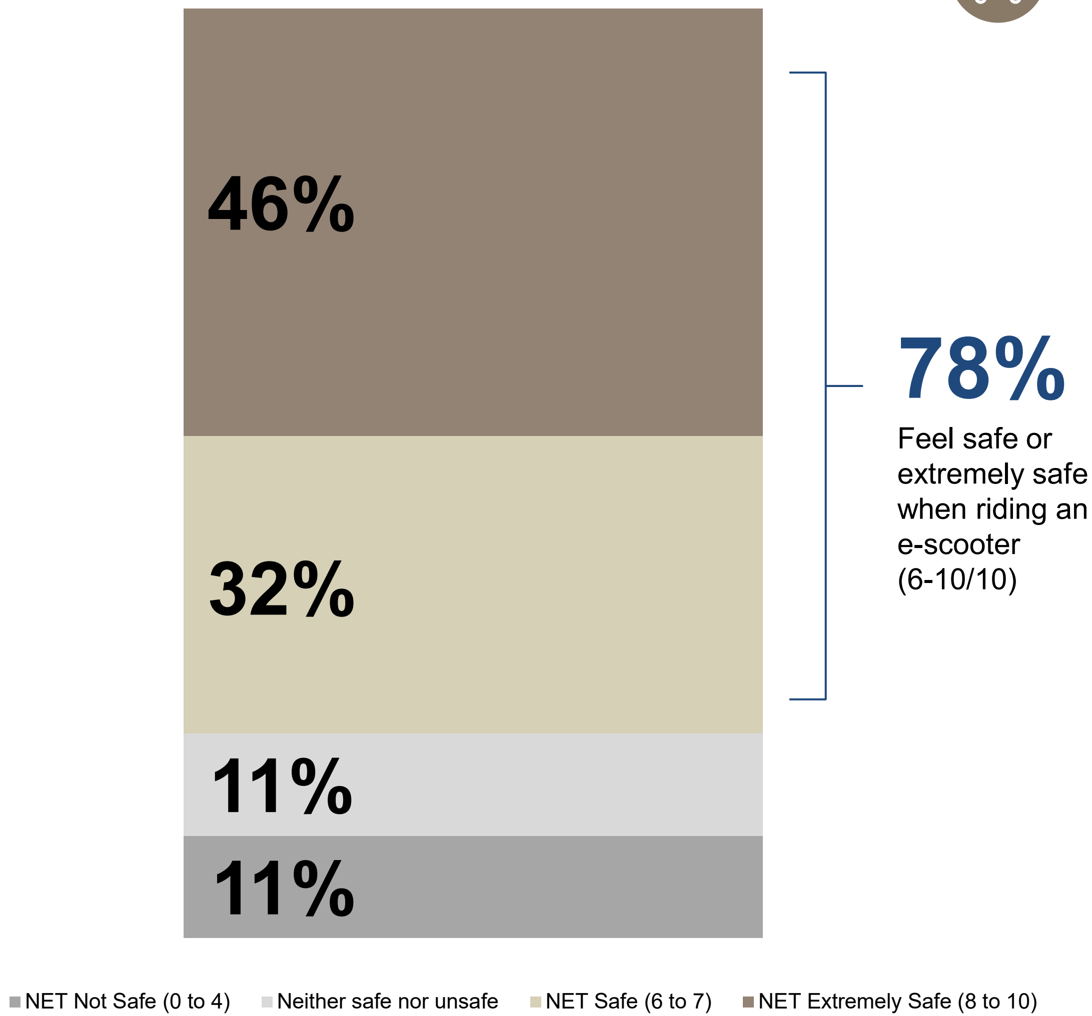
“I’m a competent rider.”

Speed of the e-scooter and being close to the road are reasons for feeling unsafe.

“I just really didn’t like how fast the thing went. It did not feel nice.”

ESQ3a. Overall, how safe or unsafe do you feel riding an e-scooter?
Base: E-scooters Q4 2024, Q1 and Q2 2025 n=431
ESQ3b/ c: In what ways do you feel safe/ unsafe?

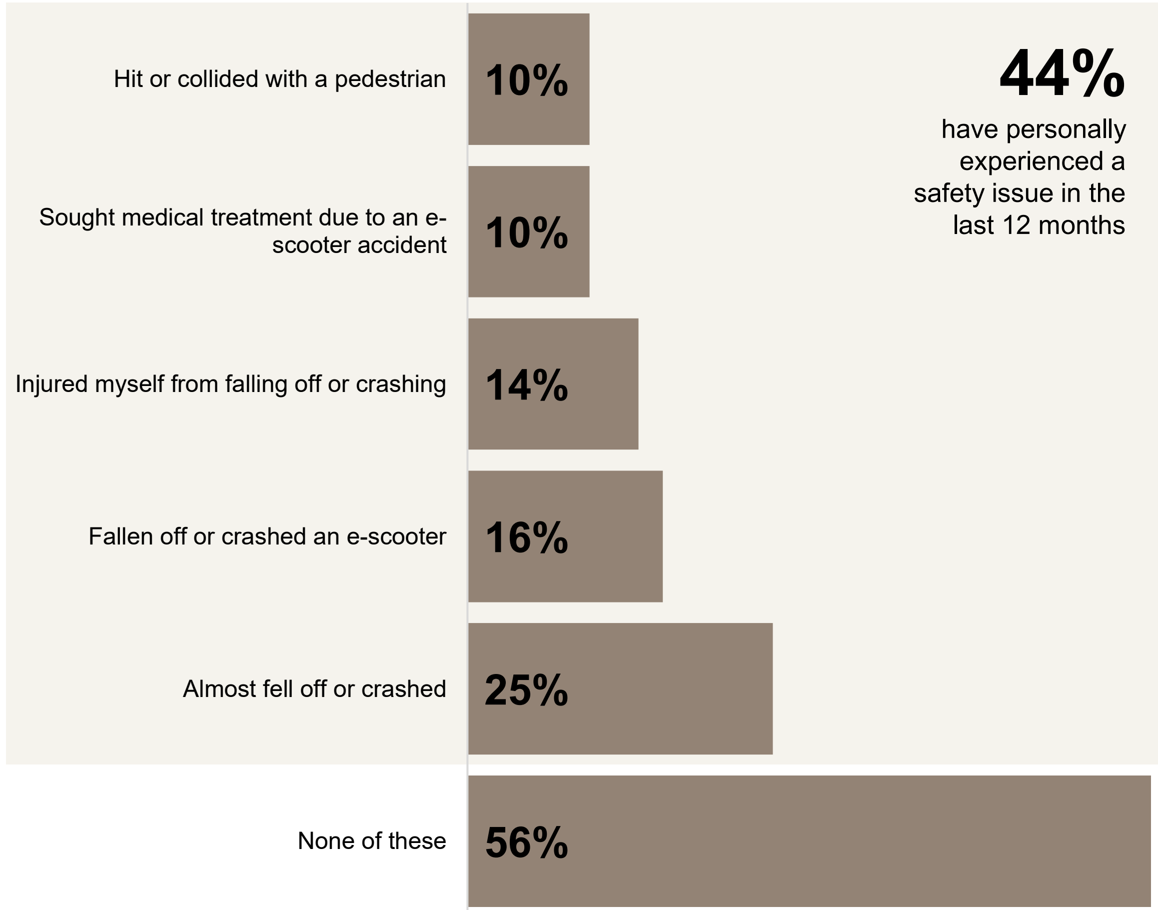
PERCEIVED SAFETY AS AN E-SCOOTER RIDER
OCT 24 - JUN 25



44% of e-scooter riders report experiencing a crash or near miss in the last year

This is significantly higher among males (52%), significantly lower among females (35%).

ISSUES EXPERIENCED BY PEOPLE WHILE RIDING AN E-SCOOTER IN THE LAST 12 MONTHS
OCT 24 - JUN 25

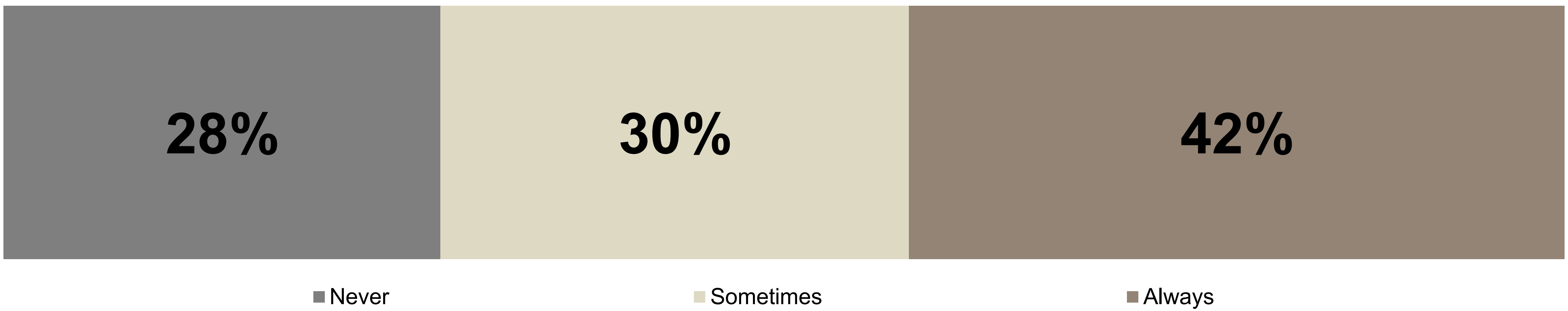


ESQ4 When riding an e-scooter have you personally experienced any of the following in the past 12 months?
Base: E-scooters riders Q4 2024, Q1 and Q2 2025 n=431, E-scooter riders Male n=234, E-scooter riders Female n=192.

42% are always wearing a helmet when riding an e-scooter

Ownership is a key indicator of helmet use. Among those who own a working e-scooter two-thirds (69%) always wear a helmet, significantly more than those who borrow or hire one.

HOW OFTEN DO YOU WEAR A HELMET WHEN E-SCOOTERING
OCT 24 - JUN 25



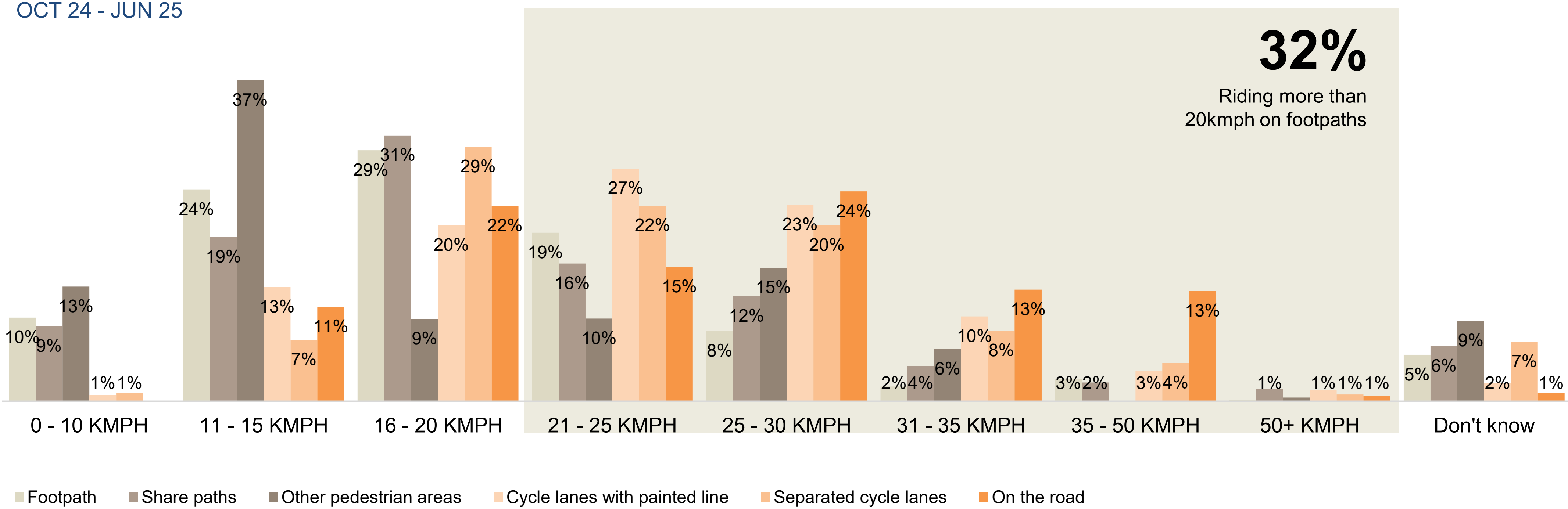
ESQ10. How often do you use a helmet when you are using an e-scooter
Base: E-scooter riders Q4 2024, Q1 and Q2 2025 n=431, own a working e-scooter n=137, borrow or hire e-scooters n=150

E-scooter users report travelling lower speeds in areas shared with pedestrians compared to those shared with bikes and vehicles

When riding, one third of e-scooters report traveling faster than 20 KMPH on footpaths.

ESTIMATED SPEED INDIVIDUALS RIDE E-SCOOTERS IN DIFFERENT LOCATIONS

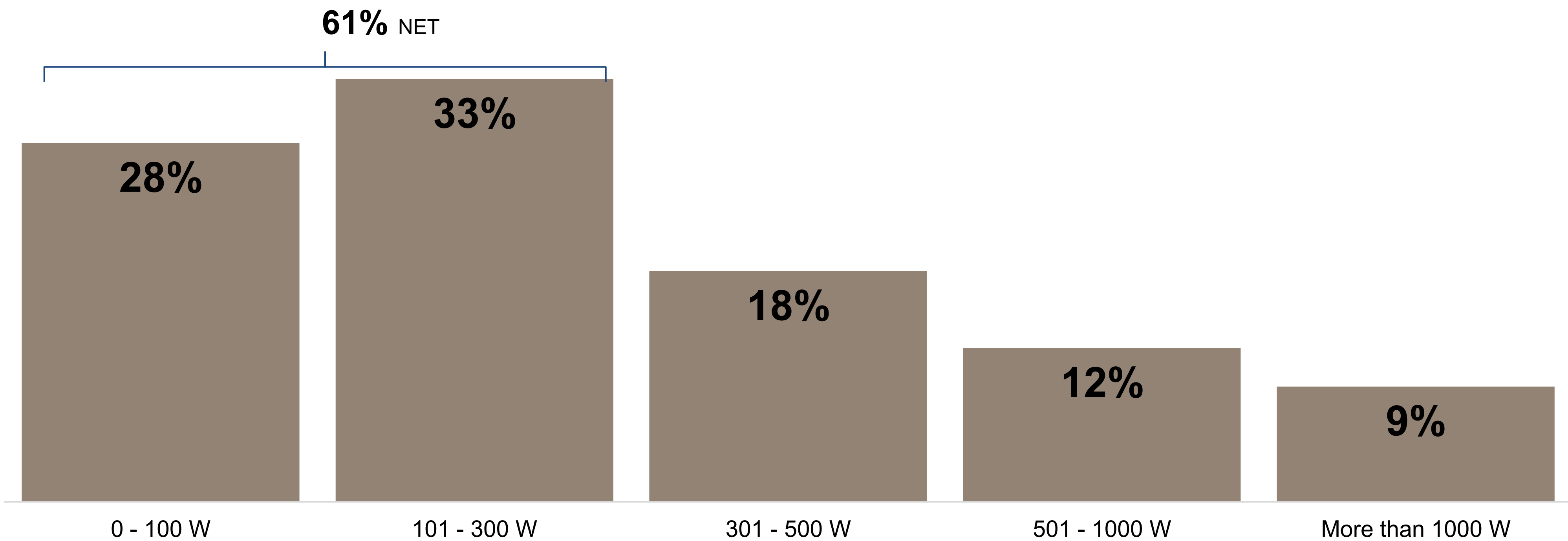
OCT 24 - JUN 25



ESQ8. What's the average speed you go when riding an e-scooter
Base: Q4 2024, Q1 and Q2 2025 Those who ride e-scooters on a… footpath n=252, shared path n=228, other pedestrian area n=62, cycle lanes separated from cars with a painted line n=160, separated cycle lanes/paths n=188, on the road n=92.
No bar means 0% reported this speed range for the location

Two thirds of riders perceive the power output of their e-scooter to be 300W or lower

POWER OUTPUT OF E-SCOOTERS OWNED
OCT 24 - JUN 25

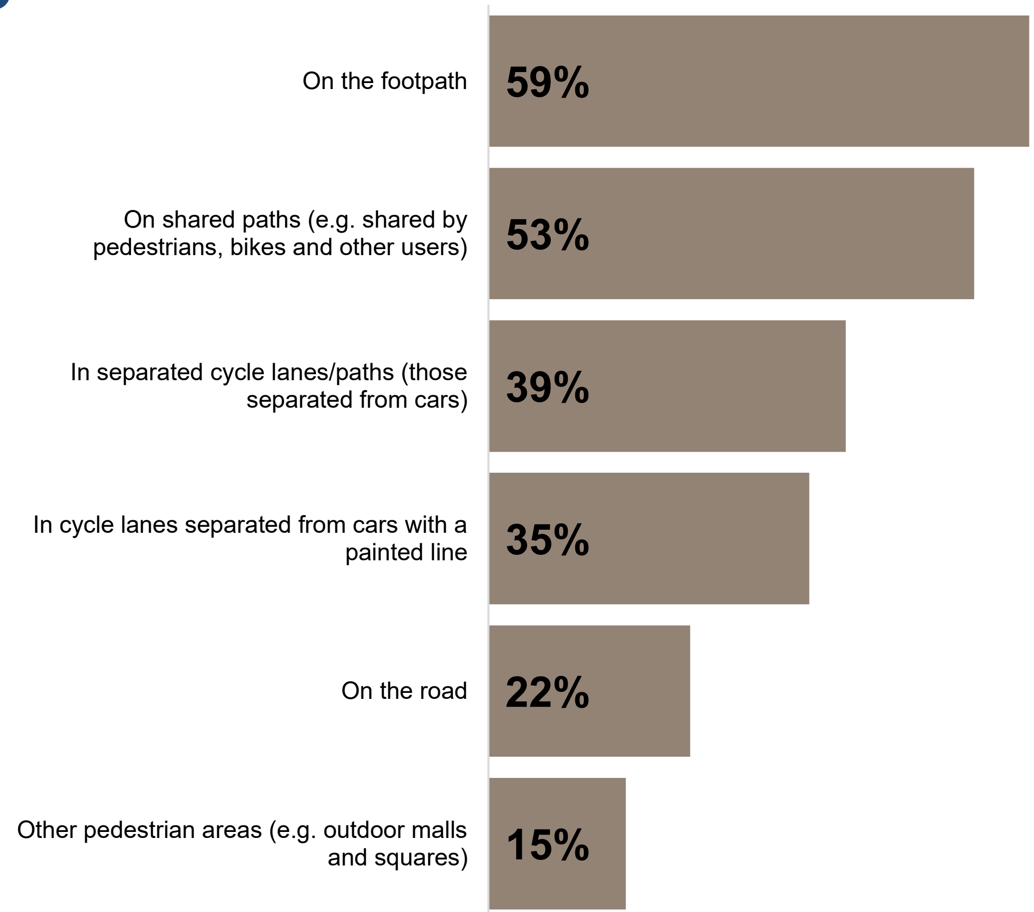


ESQ9. What is the power output in Watts of your e-scooter
Base: E-scooter owners Q4 2024, Q1 and Q2 2025 n=269

The most common areas e-scooters are riding are on footpaths and shared paths

These are also among the top 3 areas e-scooter riders think they are allowed to ride their e-scooter, along with in separated cycle lanes/paths.

WHERE PEOPLE ARE RIDING E-SCOOTERS – AMONG THOSE WHO RIDE AN E-SCOOTER AT LEAST ONCE A YEAR
OCT 24 - JUN 25



ESQ6 Where do you currently ride an e-scooter?
Base: E-scooters Q4 2024, Q1 and Q2 2025 n=431

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Appendix

Changes to the survey

IMPACT COMPARISON OVER TIME

In 2020, improvements were made to questions and question order. Changes include clarification of response options and rationalisation of questions to prevent people needing to answer similar questions.

The question order was changed to ensure questions are asked in a logical flow in line with travel behaviour. The change in question order and questions means direct comparability of results is impacted. Where question wording and response options are the same comparisons have been included, and any impacts of the changes have been highlighted.

CONTINUOUS TRACKING

Further improvements were made to the questionnaire sampling methodology in 2021. This was done to compare seasonal shifts and to get an accurate reflection of the calendar year. 2021 sampling includes a continuous / 'always on' sampling approach, where interviews are collected daily across the research period, from January 2021 – December 2021.

In order to assess the impact of this change in methodology, a 'parallel run' sample was collected across May – June 2021, to correspond with historic data capture. This 'dip' data is referenced in this report where relevant to highlight, for example, where a change in methodology impacts how we interpret trended results.

When reporting the 2021 calendar year results and the dip data has been down-weighted from a total sample of 4,924 to represent the equivalent monthly sample collected throughout the year.

2018	21st May – 24th June
2019	22nd May – 24th June
2020	28th May – 30th June
2021	11th January – 29th December
2022	11th January – 29th December
2023	12th January – 20th December
2024	13th January – 19th December

CHANGE IN HOW WE CAPTURE WALKING

In April 2023, we made changes in the survey to improve the accuracy in capturing the proportion of Urban New Zealanders that walk.

In the survey, respondents are first provided with a list of multiple travel behaviours and asked to select the behaviours they have engaged in during the last 12 months. One of the options is walking (defined as walking 100m or crossing the road).

Prior to April 2023, this was used to capture those that have walked in the last 12 months. However, approximately a quarter of respondents were reporting that they had not walked in the last year.

In April 2023, we added a subsequent follow-up question that asked those who indicated they had not walked, whether they were sure they have not walked in the last 12 months. Of those people, a large majority had in fact walked. These people are now classified as walkers, improving the accuracy of reporting.

In 2024 after the above change was made, a routing issue was discovered. People who indicated they were in fact walking were not asked the follow up question (Q24) regarding the frequency of their walking. This was identified and changed at the end of Q1 2024.