



2021 Understanding attitudes and perceptions of cycling & walking

WAKA KOTAHI



TRA

BACKGROUND OF OUR RESEARCH PROGRAMME

This study provides a way of monitoring attitudes and behaviours around walking and cycling, in response to ongoing efforts to improve our cities for people getting around on foot or by bike

Increasing the share of travel by public transport, walking and cycling in New Zealand's cities has a critical role to play in improving the wellbeing of New Zealanders by creating more accessible and inclusive cities that are prosperous, safe, healthy, and sustainable. The government aspires to provide genuine travel choices as a key way to improve access to social and economic opportunities.

Over the last six years, Waka Kotahi and our council partners have significantly increased investment in improving the quality and quantity of walking and cycling facilities and programmes to support their use. In recent years, there has been significant growth in the use of these shared and active modes in our cities but there remains a need to do much more.

The primary objectives of the research programme

1

Measure and monitor walking and cycling behaviour

- Comparing results over time (2021 vs 2020, 2019 & 2018).
- Comparing results across main urban centres.

2

Understand attitudes and perceptions towards walking, cycling, and recent investments and initiatives.

3

Identify opportunities to increase the number of trips, and the proportion and diversity of people traveling by active modes.

The approach

Monitoring the effectiveness of the Urban Cycling Programme roll-out by measuring behaviour and understanding attitudes and perceptions around urban walking and cycling.

A 15-minute online survey of n=4,942 New Zealanders

With a focus on key regions of:

- Auckland n=1143
- Wellington n=1035
- Christchurch n=1032
- Hamilton n=582
- Tauranga n=563
- Dunedin n=555

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

- n=2,947 +/-2.1%
- n~500 is +/-4.4%
- n~200 is +/-6.9%

Fieldwork ran from Jan 11th 2021 – December 29th 2021

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 within each region, to ensure data is representative according to Stats NZ 2018 census.

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

Data was weighted to be representative of the calendar year with a population n=2,947 New Zealanders

The key regions were weighted to

- Auckland n=700
- Wellington n=700
- Christchurch n=700
- Hamilton n=280
- Tauranga n=280
- Dunedin n=280

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'21 – December'21.

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.

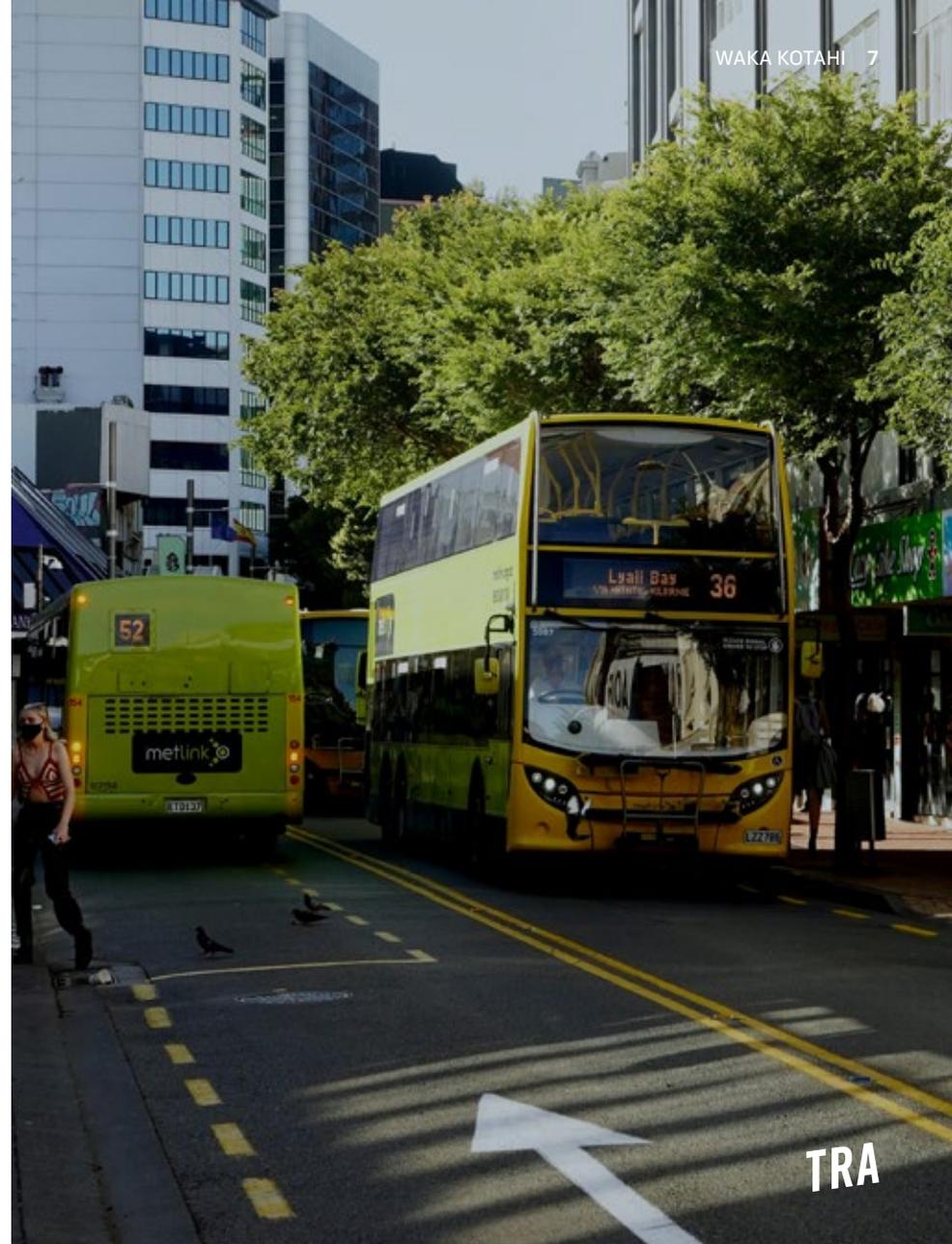
2018	2019	2020	2021
May 21st – June 24th	May 22nd – June 24th	28th May – 30th June	11th January – 29th December

Summary: Key findings

Summary: Overall

OVERALL TRAVEL BEHAVIOUR

- Over the past two years, walking and cycling have played an increasing role in how New Zealanders travel around their cities, with around 7 in 10 walking or cycling regularly.
- This increase is despite a coinciding growth in regular motorized vehicle usage over the same period.
- Regular use of public transport, on the other hand, is steady, although has shown significant variation by quarter which may be related to COVID-19 disruption.
- There is significant variation in use of active modes by region with Hamilton recording the lowest levels of walking, alongside one of the highest levels of cycling. Conversely, Dunedin and Wellington have the lowest levels of cycling but the top two levels of walking.
- People who cycle regularly have a high cross-over into regular use of other modes, particularly walking.



Summary: Walking



SUPPORT FOR WALKING

- Over 7 in 10 (72%) see walking as a great way of getting around town quickly and easily – a positive perception that's holding steady in 2021.

SAFETY AND INFRASTRUCTURE PERCEPTIONS

- Barriers to walking remain consistent over time, with the most prominent barriers relating to safety concerns walking in the dark and convenience, with perceptions that walking is not a quick way to travel.
- Walking barriers are generally more prominent in Auckland, Hamilton and Tauranga.
- Overall over 8 in 10 feel safe walking, but this perception decreased significantly in 2021.
- Satisfaction with walking infrastructure was maintained into 2021: at least three-quarters of urban New Zealanders are satisfied with the amount of stair-free footpaths, marked pedestrian crossings, footpaths / shared use paths and way-finding.
- Perceptions around the safety of walking to school have decreased alongside signs that fewer trips to school are made on foot.

TRAVEL BEHAVIOUR

- Walking is something most people do, with 75% of urban New Zealanders walking* in the last 12 months. Walking levels have remained stable since previous periods.
- Walking levels differs at a regional level; Hamilton has the lowest level of urban walking, while Wellington and Dunedin have the highest proportions walking.
- Women are more likely to walk as a means of transportation.

*walking 100m or crossing the road.

Summary: Cycling



SUPPORT FOR CYCLING

- Over half (56%) think cycling is a great way of getting around – although the majority, this perception has softened in 2021.
- Nevertheless, strong support towards cycling remains, with around 7 in 10 urban New Zealanders supportive of cycling in their communities.
- There is also corresponding support for investment in cycling infrastructure among the majority. Related to this, 7 in 10 people are aware of at least one Innovating Streets project. And among those aware, nearly three-quarters support this type of project.

*walking 100m or crossing the road.

SAFETY AND INFRASTRUCTURE PERCEPTIONS

- In recent years, there has been continual development and improvements made to cycling infrastructure across New Zealand. This continues to play a key role encouraging cycling, satisfaction with infrastructure saw an uplift in 2020 and remains in 2021.
- Barriers to cycling tend to focus on safety – particularly from motor vehicle drivers and cycling in the dark. But logistical barriers also come into play; one-third of people mention having too much to carry and the same proportion mention the weather as a barrier.
- Overall safety perceptions for cycling are stable: in 2021, 55% of urban New Zealanders perceive cycling as safe. There is significant variation across the regions, with perceptions lowest in Auckland and Wellington and highest in Hamilton and Christchurch.
- 31% of urban New Zealanders are aware cyclists are encouraged to take the lane and, once aware, around two-thirds support this. Around 4 in 10 cyclists report taking the lane in certain situations most or all of the time.

TRAVEL BEHAVIOUR

- One-quarter of urban New Zealanders have cycled in the past year and 20% are riding at least occasionally.
- Overall, there has not been a significant change in the proportion of people cycling since 2020, but the frequency with which people cycle has increased.
- Cycling levels differ at a regional level; Dunedin and Wellington have the lowest level of current cyclists. Although relatively low participation rates, the levels of cycling in Dunedin have significantly increased from 2020. Urban cycling shows particular strength in Hamilton, and Christchurch.

Contents

1

The context for walking and cycling

2

Support for Active Modes

3

Overall travel behaviour

4

A closer look at walking

5

A closer look at cycling

6

A closer look at E-mobility

7

Opportunities to increase the number of people walking and cycling



**The context for
walking and cycling**

TRA

Summary: The context for walking and cycling

- Covid-19 continues to impact how New Zealanders move around their cities.
- There have been changes in restrictions for New Zealand throughout 2021 and there continues to be ongoing change to how people travel about their towns and regions.
- The majority of research in this report focuses on January to December 2021 data.
- Due to the change in methodology we can also start to compare the calendar year periods and quarterly data within the year. Lockdowns during the period will likely have a great implication on this data and periods within it.



Covid-19 restrictions and lockdowns have had an impact on travel behaviour



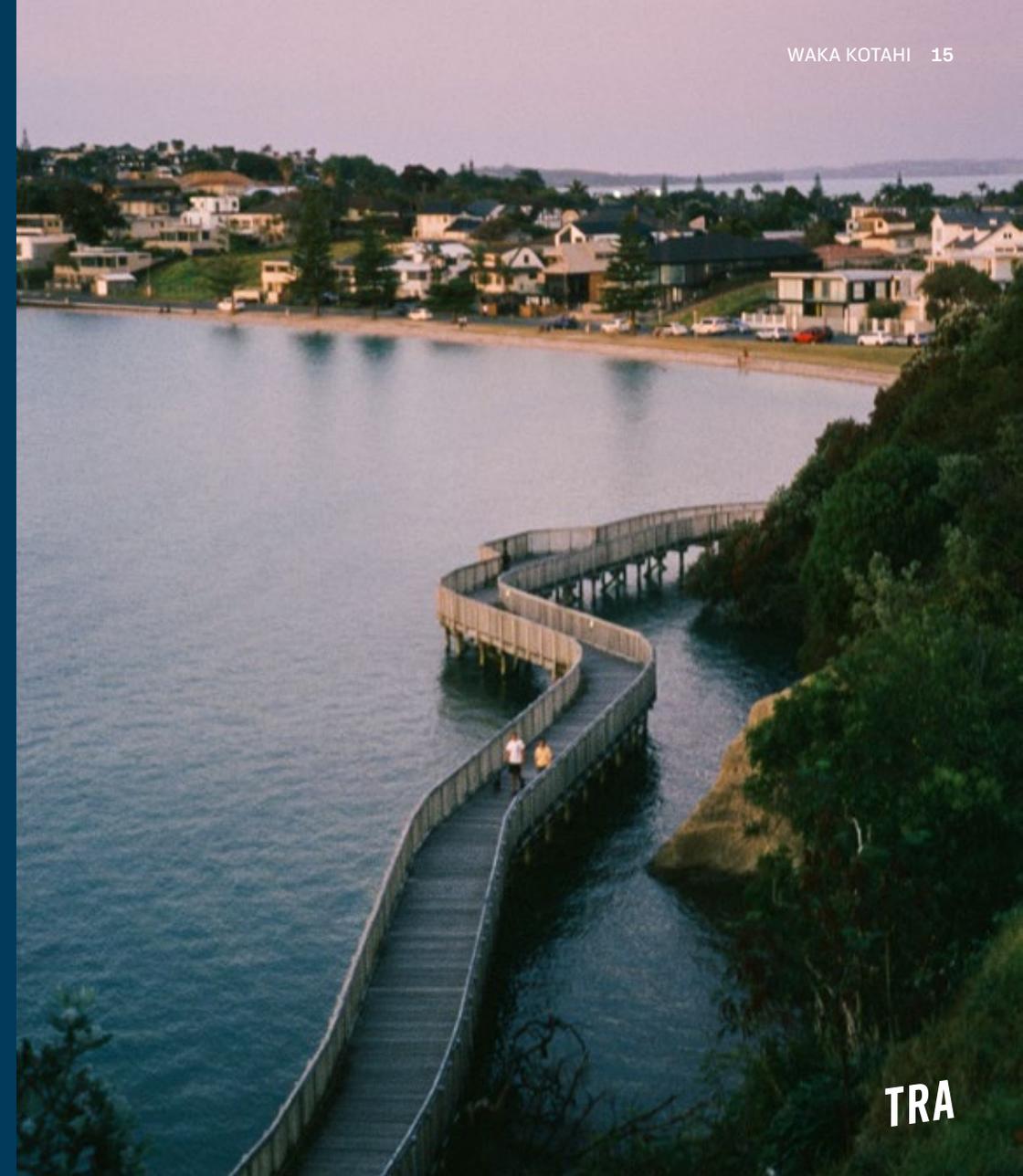
Results from the Waka Kotahi COVID-19 Transport Impact Monitor indicate that during fieldwork for this research there was rapid changes in behavior. During the calendar year period from January to December, New Zealand had periods of lockdowns, this was more evident in Auckland than other regions. The traffic light system was introduced when COVID 19 was in the community. During the periods of Lockdown an increasing number of people reported their daily travel routine was disrupted. More than 2 in 5 people have made significant life changes since the 2020 Covid Outbreak and these may impact their travel behaviours.

2

Support for Active Modes

Summary: Support for Active Modes

- Perceptions of walking and cycling as ways of getting around remain positive. Over 7 in 10 (72%) see walking as a great way of getting around town quickly and easily, and over half (56%) think the same for cycling – a result that has, however, softened in 2021.
- Nevertheless, strong support towards cycling remains, with around 7 in 10 urban New Zealanders supportive of cycling in their communities. At a regional level, support is highest in Hamilton and lowest in Auckland, with both regions seeing a slight dip in support, as well as in Tauranga.
- There is also corresponding support for investment in cycling infrastructure among the majority. This investment is seen as important not only for more transport options, but for exercise purposes as well.
- 7 in 10 people are aware of at least one Innovating Streets project. And among those aware, nearly three-quarters support this type of project.



Most people view walking and cycling as an easy and effective form of transport, although this support is softening for cycling

PERCEPTIONS OF WALKING & CYCLING - % STRONGLY AGREE / AGREE

72% (-1)

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



Women (76%) and those in Wellington (79%) are significantly more likely to agree.



56% (-4) ▼

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

Those under 35 are particularly supportive of cycling with 62% agreeing.

Q7 - Now please tell us how much you agree or disagree with the following statements (Strongly agree + agree)
Base Jan-Dec 2021 n= 4924

▲ Significantly higher than 2020 ▼ Significantly lower than 2020

Nevertheless, public support for cycling remains strong; around 7 in 10 support cycling in their community and 9 in 10 support walking

This compares to just 14% who are unsupportive of cycling and 3% unsupportive of walking.

SUPPORT OF CYCLING IN THE COMMUNITY



NET: SUPPORTIVE (6-10)

June 2018	June 2019	June 2020	Jan-Dec 2021
73%	71%	71%	68%

SUPPORT OF WALKING IN THE COMMUNITY



Don't know
Very unsupportive(0-2)
Unsupportive(3-4)
Neutral(5)
Supportive(6-7)
Very supportive(8-10)

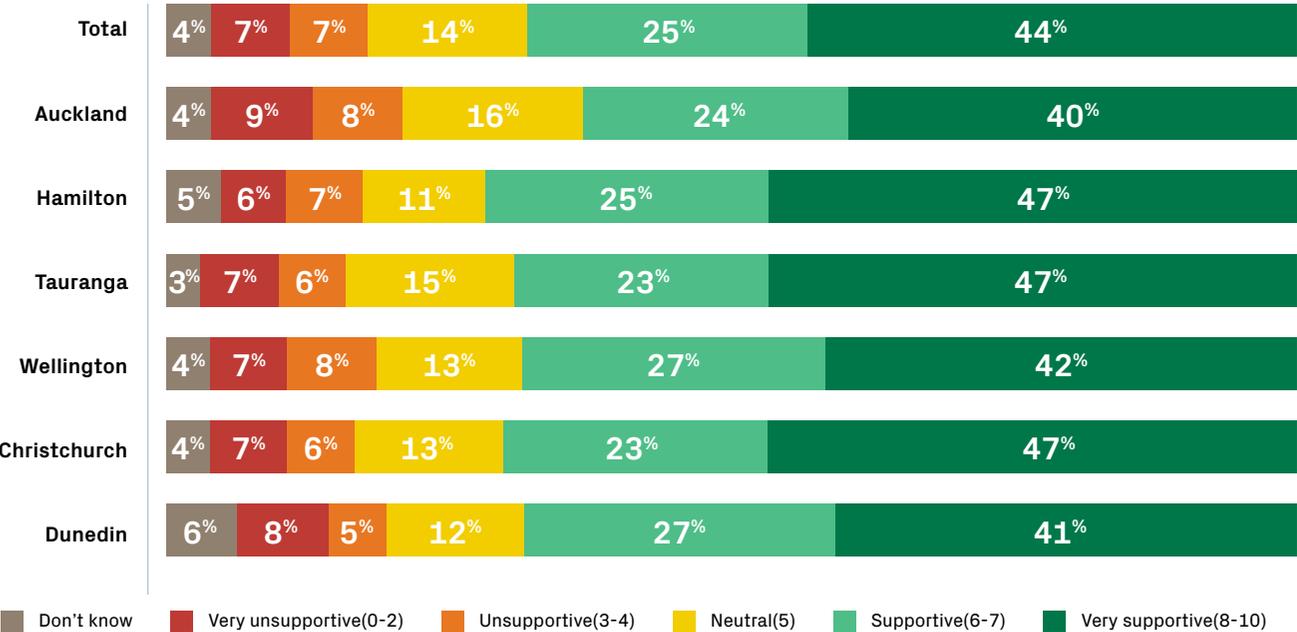
Q6c: There are varying levels of support in the community for people who choose to cycle for journeys such as traveling to work, going to shops or other activities. To what degree do you support cycling in your community Base: Jan-Dec'2021 n=4924
 Q6d: Now thinking about walking and people who choose 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? Jan-Dec'2021 n=4942
 Q6d added in 2021, Question order changed in 2020.

Support has decreased in Auckland, Hamilton and Tauranga



Levels of support are similar across all regions.

SUPPORT OF CYCLING IN THE COMMUNITY



NET: SUPPORTIVE (6-10)

	June 2018	June 2019	June 2020	Jan-Dec 2021
Total	73%	71%	71%	68%
Auckland	69%	68%	68%	64% ▼
Hamilton	77%	70% ▼	78% ▲	72% ▼
Tauranga	77%	73%	78%	69% ▼
Wellington	74%	72%	71%	69%
Christchurch	72%	73%	68%	70%
Dunedin	73%	70%	68%	69%

Q6c: There are varying levels of support in the community for people who choose to cycle for journeys such as traveling to work, going to shops or other activities. To what degree do you support cycling in your community?
 Base: Total n=4924, Auckland n=1143, Hamilton n=582, Tauranga n=563, Wellington n=1035, Christchurch n=1032, Dunedin n=555
 No change to question wording and response options. Question order changed

▲ Significantly higher than previous period

▼ Significantly lower than previous period



Over half think investing in cycling infrastructure is important

PERCEPTIONS OF CYCLING INFRASTRUCTURE INVESTMENT - % STRONGLY AGREE / AGREE



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



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

Support for investment is highest in Hamilton

Q7 - Now please think about walking and cycling in general. How much do you agree or disagree with each of the following statements? Base Jan-Dec 2021 n= 4924

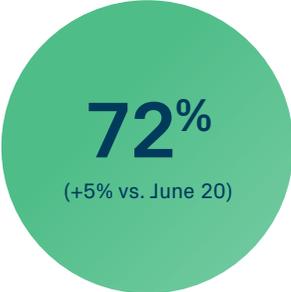
▲ Significantly higher than previous period

▼ Significantly lower than previous period

Over 7 in 10 aware of at least one Innovating Streets for people project

AWARENESS OF TACTICAL URBANISM INFRASTRUCTURE PROJECTS IN THEIR REGION

JUL – DEC 2020 AND JUL – SEPT 2021 DATA COMBINED



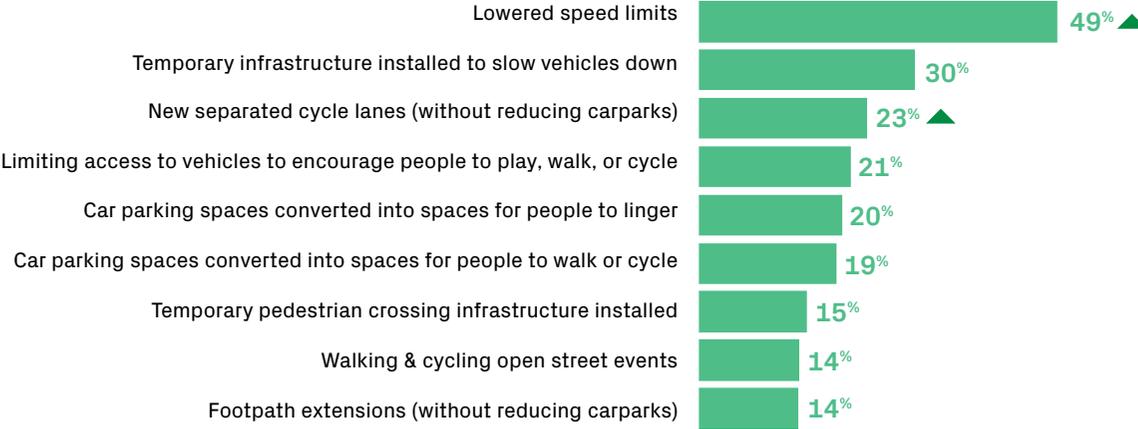
Overall awareness of Innovating Streets projects is growing, with just over 7 in 10 urban New Zealanders now aware of at least one project. This figure rises significantly in Auckland (78%) and Dunedin (85%).

Top 3 ways of finding out about projects:

- I drove in the area and saw it (57%)
- I walked in the area and saw it (42%)
- News reports/articles (30%)

Some New Zealand cities have been undertaking temporary low-cost infrastructure projects or pop up events that transform urban spaces in creative ways and make it easier or safer for people to walk, cycle, or scoot. **These types of projects are called Tactical Urbanism.**

TACTICAL URBANISM PROJECTS AWARENESS



▲ Significantly higher than previous period

▼ Significantly lower than previous period

Q16. Thinking about Tactical Urbanism infrastructure projects, which of the following projects in [REGION] are you aware of that has happened, over the last 12 months, or is currently happening? This can be in your neighbourhood, town, city centre.
 Q16c. Have you had the opportunity or provided feedback on these infrastructure project(s)?
 Base: July 2020- December 2020, July- September 2021 Combined Base: Total n=2119 Data compared to June 2020 DIP n=2,267

Nearly three-quarters are supportive of tactical urbanism projects

SUPPORTIVE OF TACTICAL URBANISM INFRASTRUCTURE PROJECTS IN THEIR REGION

Total	71%	Support is fairly universal across different demographic groups, but drops significantly among those over 65 years old (61%).
Auckland	73%	
Hamilton	67%	
Tauranga	70%	
Wellington	73%	
Christchurch	70%	
Dunedin	65%	The Dunedin region had the highest awareness of projects but also had the lowest level of support



14% of people have provided feedback relating to a tactical urbanism project in the past 12m, this is highest in Auckland and Hamilton.

Q16. Thinking about Tactical Urbanism infrastructure projects, which of the following projects in [REGION] are you aware of that has happened, over the last 12 months, or is currently happening? This can be in your neighbourhood, town, city centre.
 Base: July 2020- December 2020, July- September 2021 Combined Base: Total n=2119

Perceptions around the safety of walking and cycling to school have softened

SAFETY PERCEPTIONS – JAN-DEC 2021

61% (-3) ▼

I think it is safe for kids to walk to school



41% (-2)

I think it is safe for kids to bike to school

Q7 - Now please think about walking and cycling in general. How much do you agree or disagree with each of the following statements? Base Jan-Dec 2021 n= 4924

▲ Significantly higher than prior year

▼ Significantly lower than prior year

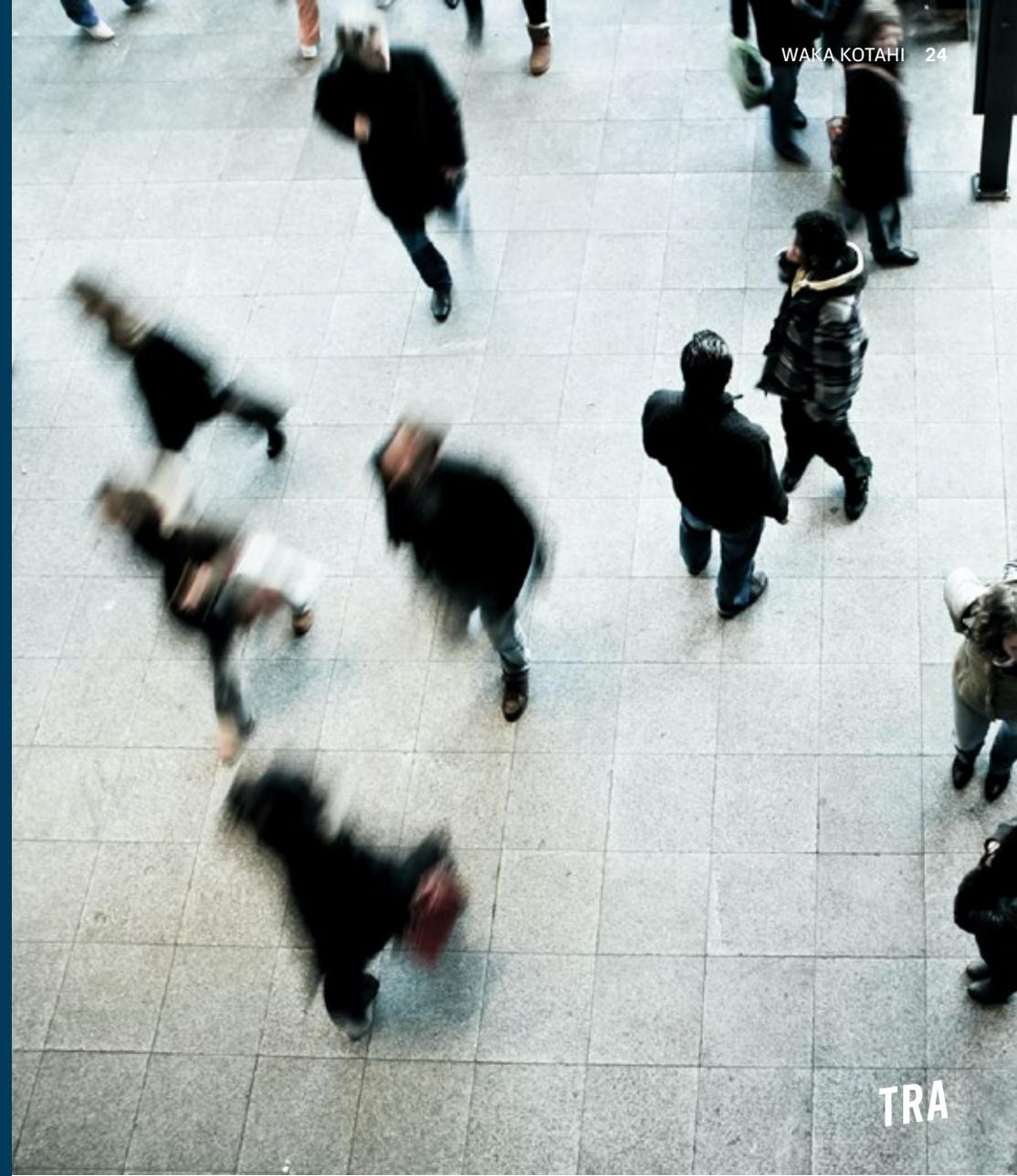
3

Overall travel behaviour

TRA

Summary: Overall travel behaviour

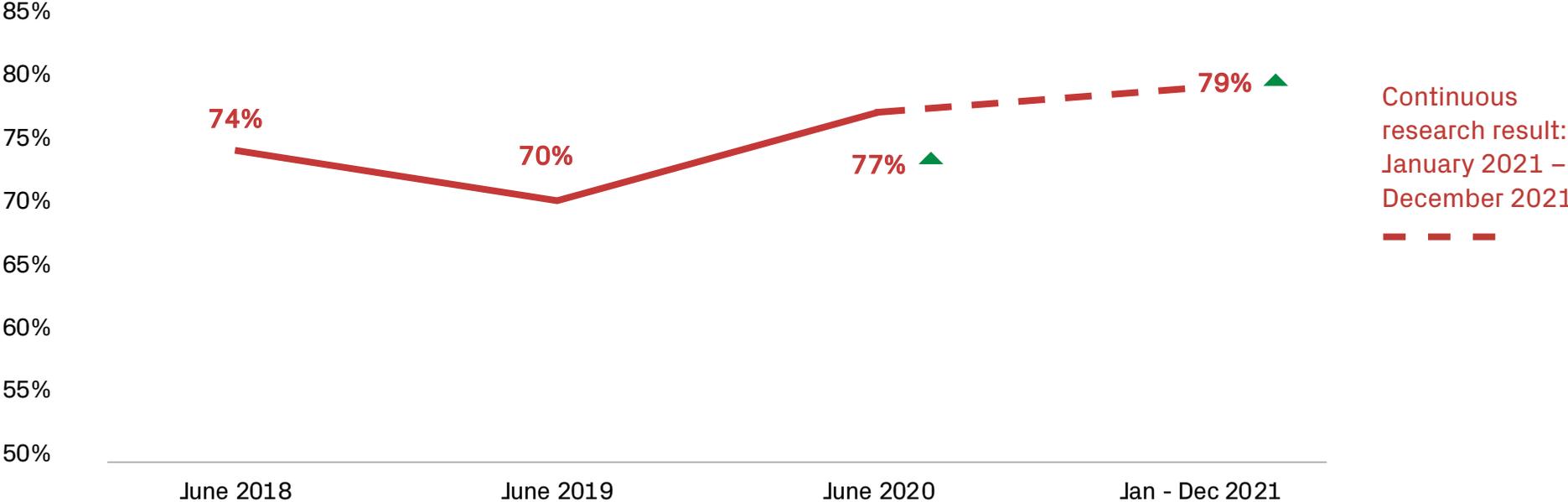
- Over the past two years, walking and cycling have played an increasing role in how New Zealanders travel around their cities, with around 7 in 10 walking or cycling regularly.
- This increase is despite a coinciding growth in regular motorized vehicle usage over the same period.
- Regular use of public transport, on the other hand, is steady, although has shown significant variation by quarter which may be related to COVID-19 disruption.
- There is significant variation in use of active modes by region with Hamilton recording the lowest levels of walking, alongside one of the highest level of cycling. Conversely, Dunedin and Wellington have the lowest levels of cycling but the top two levels of walking.
- Regular cyclists have a high cross-over into regular use of other modes, particularly walking.





Regular motorised vehicle usage continues an upward trend following a significant uplift recorded in 2020

USE OF MOTORISED VEHICLES - 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, June 2018 n=2,115, June 2019 n=2,174, June 2020 n=2,256, June 2021 n=2,152, continuous 2021 n=4924
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter)
 Change in question response options. No change in 'at least once a week' response options, ability to compare.
 Change in methodology – continuous data showing

▲ Significantly higher than previous period

▼ Significantly lower than previous period



Taxi and ride share usage has significantly increased since 2020

ANNUAL TRENDS : USAGE OF MOTORISED VEHICLES AT LEAST ONCE A WEEK

	June 2018	June 2019	June 2020	Jan- Dec 2021
NET: Motorised vehicle	74%	70% ▼	77% ▲	79% ▲
Private or company motor vehicle / car / truck / van	73%	68% ▼	73% ▲	75%
Taxi / ride share	-	-	5%	7% ▲
Motorbike / scooter	3%	3%	4%	4%

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
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter)
 Change in question response options. No change in 'at least once a week' response options, ability to compare.
 Change in methodology – continuous data showing
 Note: Taxi and Rideshare added in 2020

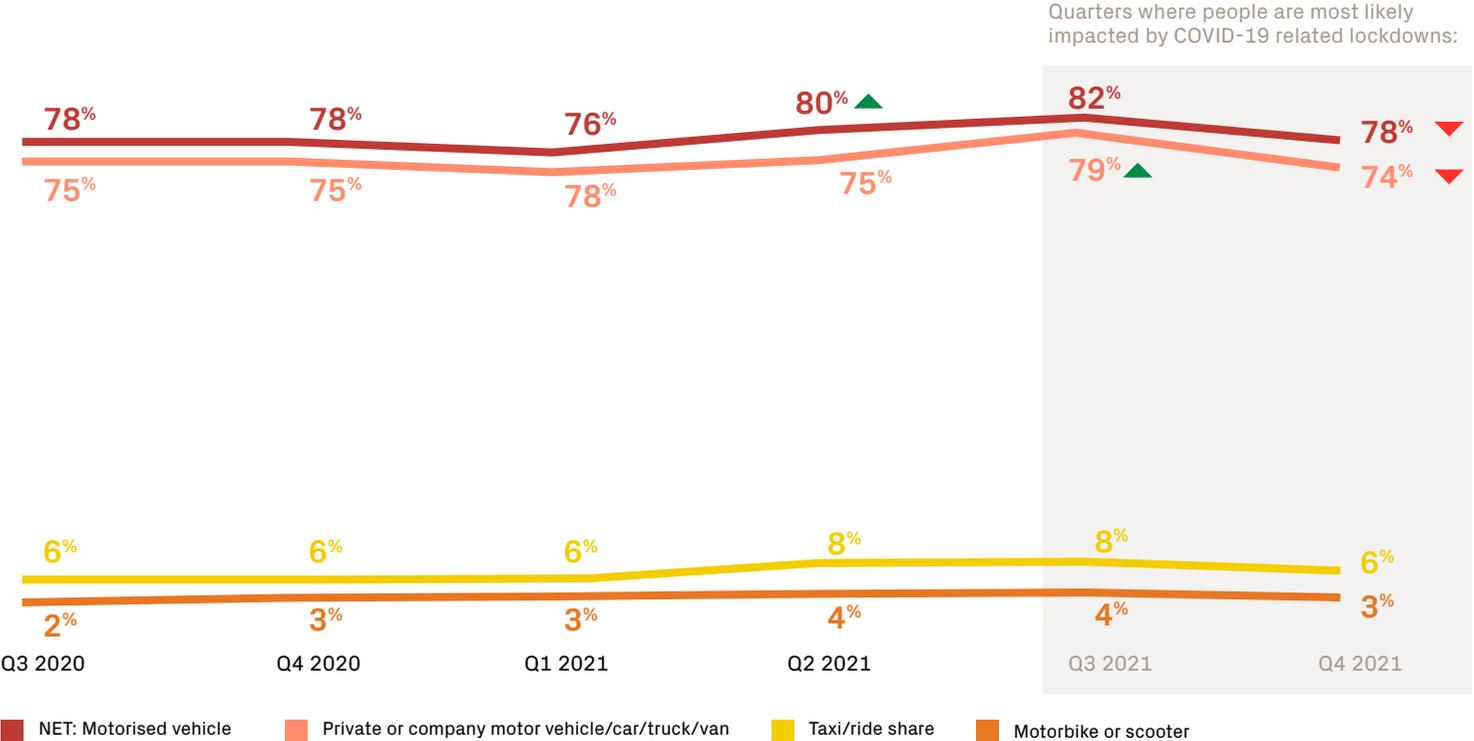
▲ Significantly higher than previous period

▼ Significantly lower than previous period



Quarters 2 and 3 in 2021 showed comparatively high regular usage of motorised vehicles

2020/21 QUARTERLY TRENDS : USAGE OF MOTORISED VEHICLES AT LEAST ONCE A WEEK



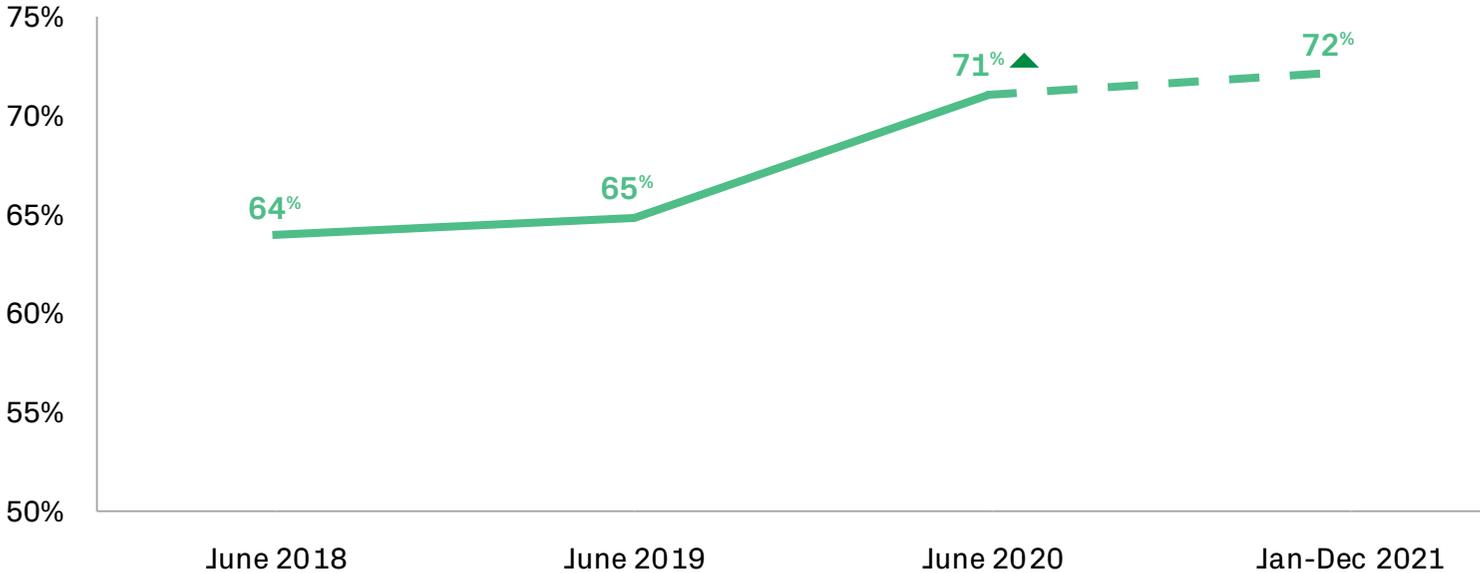
Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, 2018 n=2,115, 2019 n=2,174, 2020 n=2,256, 2021 n=2152, continuous 2021 n=4294
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter)
 Change in question response options. No change in 'at least once a week' response options, ability to compare.
 Change in methodology – continuous data showing

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



Use of active modes has grown over the past 2 years

USE OF ACTIVE MODES AT LEAST ONCE PER WEEK



Continuous research result: January 2021 – December 2021

Measures of active mode usage do appear to be impacted by the change in methodology. As we might expect, active modes usage is higher in the summer and lower in the winter which is when the research traditionally has taken place. This means that while we show a stable picture between 2020 and 2021 using the new continuous data, using the comparative dip data from June 2021, we actually see a significant decrease to 68%.

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 walking 100m or crossing the road Change in question response options. No change in 'at least once a week' response options, ability to compare. Change in methodology – continuous data showing

▲ Significantly higher than previous period

▼ Significantly lower than previous period



Increase in the use of active modes over the past 2 years is driven by a sustained uplift in people regularly walking

ANNUAL TRENDS USAGE OF ACTIVE MODES AT LEAST ONCE A WEEK

	June 2018	June 2019	June 2020	Jan- Dec 2021
NET: ACTIVE MODES	64%	65%	71% ▲	72%
Walking	60%	60%	68% ▲	68%
Bike	13%	11%	12%	11%
E-Bike	1%	2%	3%	4%
E-Scooter	2%	2%	3%	4%

Although incremental annual gains are not significant for e-bikes and e-scooters year-on-year, if we compare 2021 data to 2019 or 2018 data, we can see significant growth in these modes.

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
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter)
 Change in question response options. No change in 'at least once a week' response options, ability to compare.
 Change in methodology – continuous data showing
 Note: Taxi and Rideshare added in 2020

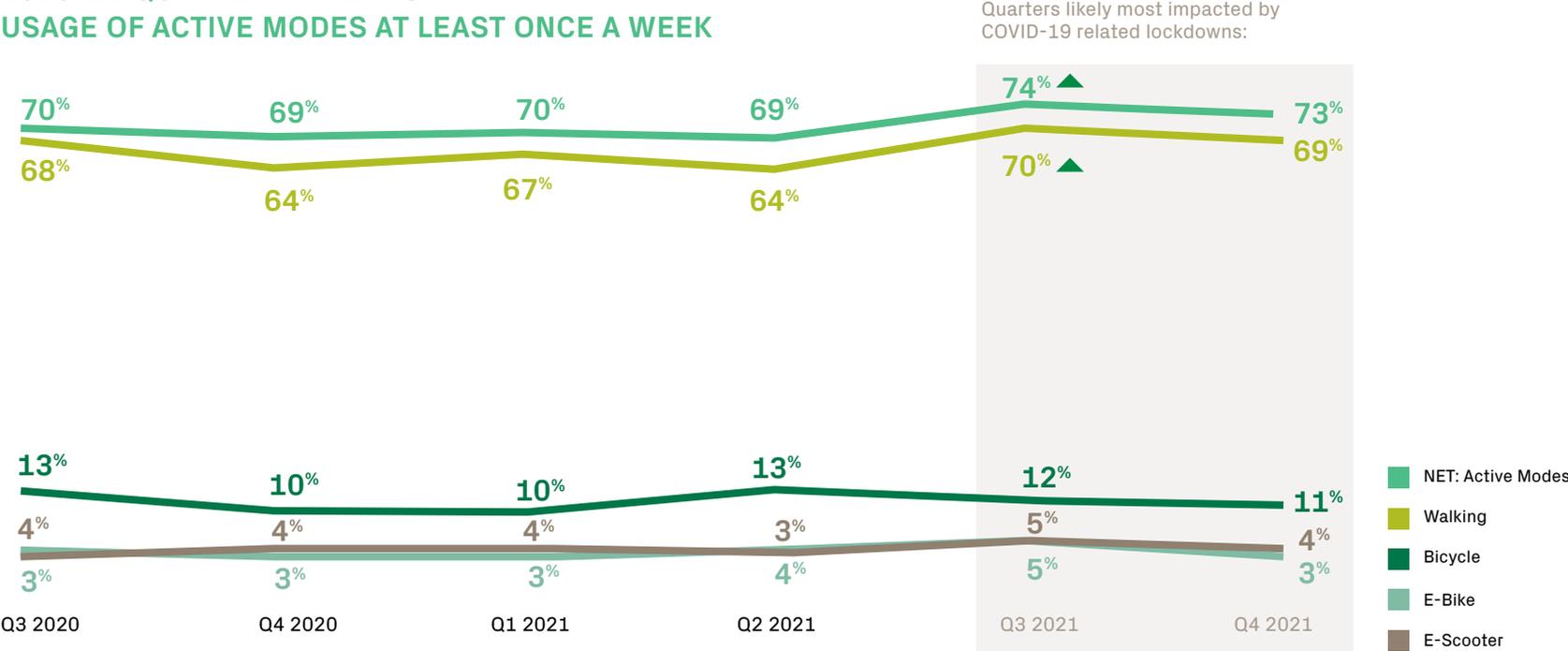
▲ Significantly higher than previous period

▼ Significantly lower than previous period



Active modes usage peaked in Q3 2021, and high levels were maintained into Q4, coinciding with the main COVID lockdown period

2020/21 QUARTERLY TRENDS : USAGE OF ACTIVE MODES AT LEAST ONCE A WEEK



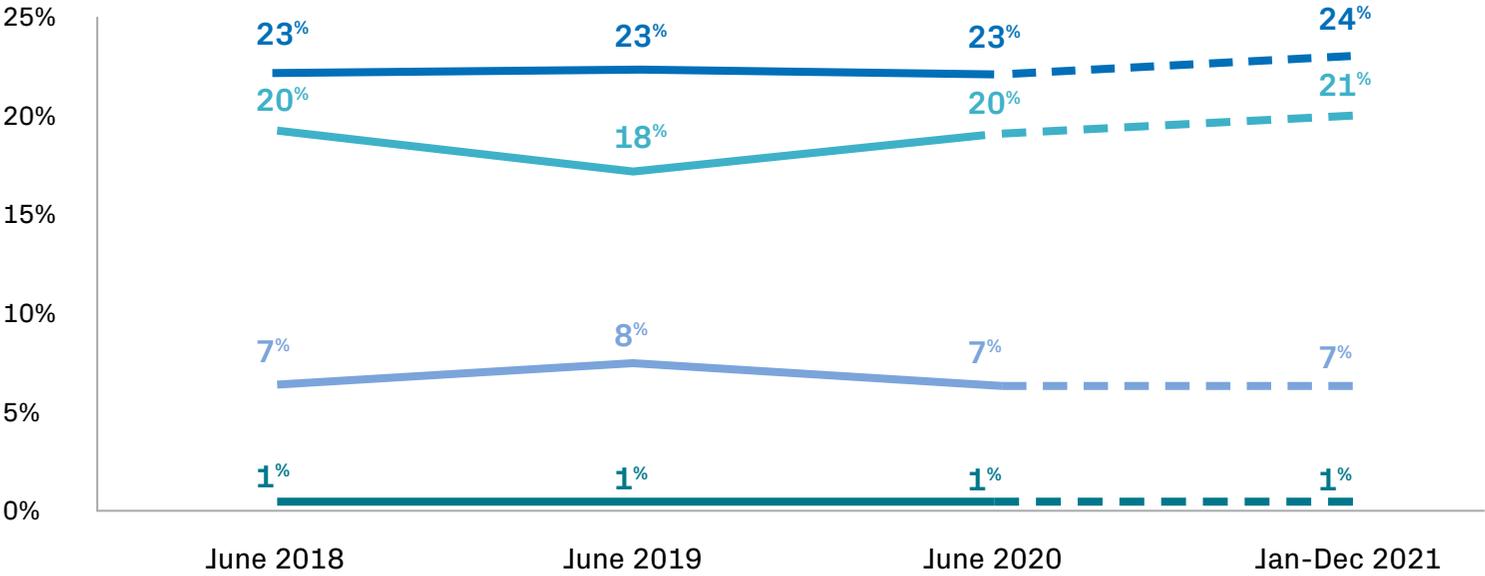
Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, 2018 n=2,115, 2019 n=2,174, 2020 n=2,256, 2021 n=2152, continuous 2021 n= 4924 walking 100m or crossing the road
NET: Active Modes (Walking, Bicycle, Electric bike, Electric scooter)
Change in question response options. No change in 'at least once a week' response options, ability to compare.
Change in methodology – continuous data showing

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



Public Transport shows similar levels of weekly usage

USE OF PUBLIC TRANSPORT AT LEAST ONCE PER WEEK



Continuous research result: January 2021 – December 2021

Public Transport Bus Ferry Train

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
NET: Public Transport (Bus, Train, Ferry)
Change in question response options. No change in 'at least once a week' response options, ability to compare.
Change in methodology – continuous data showing

▲ Significantly higher than previous period

▼ Significantly lower than previous period

Transportation choices differ significantly by region

REGULAR MODES OF TRANSPORTATION - AT LEAST ONCE A WEEK – JAN-DEC '21

	Total Jan-Dec'21	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
NET: Motorised vehicle	79%	81%	84% ▲	87% ▲	76%	79%	70% ▼
Walking*	68%	64%	63% ▼	67%	73% ▲	66%	76% ▲
NET: Cycling	14%	12%	19% ▲	13%	10% ▼	19% ▲	10% ▼
NET: Public transport	24%	30% ▲	16% ▼	6% ▼	37% ▲	18% ▼	18% ▼

Tauranga has the highest levels of motorised vehicle usage and the lowest level of regular public transport uptake.

Hamilton has the lowest levels of walking, but higher levels of cycling.

Conversely, Dunedin and Wellington have the lowest levels of cycling but the top two levels of walking.

Regular public transport uptake shows widest variation across regions.

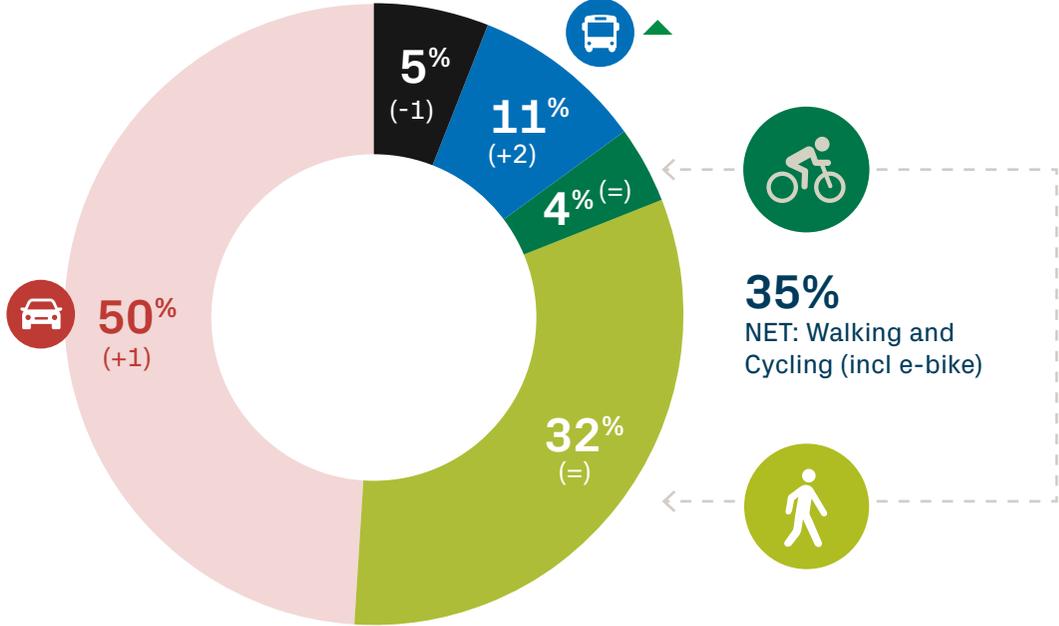
▲ Significantly higher than total ▼ Significantly lower than total

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= 4924
 *walking 100m or crossing the road
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter) NET: Cycling (Bicycle, Electric bike) NET: Public Transport (Bus, Train, Ferry)

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

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

JAN-DEC '21



35% of all recent trips measured were made by either walking or cycling.

Across all recent trips, walking accounts for almost one-third of all trips. Cycling only accounts for a small percentage of trips.

New Zealanders continue to be reliant on motor vehicles, but within this there have been shifts towards taxis and rideshare services.

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

Q26. Thinking about the past week, how many times did you use each type of transport when traveling for these occasions?
 Base: Total sample: 2021 n= 4924
 *Walking 100m or crossing the road
 Changes to question structure and wording

▲ Significantly higher than 2020 ▼ Significantly lower than 2020

Different transportation options are used for different types of trip

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

JAN-DEC '21

	TOTAL	Car	Cycling	Walking*	Train	Bus
To / from shops	25%	27%	15% ▼	28%	19% ▼	22%
To / from work	18%	19%	19%	17%	21%	22%
To / from visiting friends or family	16%	16%	14%	15%	14%	15%
To / from somewhere else	9%	7%	15% ▲	9%	10%	11%
To / from a place of recreation	7%	6%	12% ▲	8%	5%	6%
As a part of my job	7%	7%	4% ▼	7%	12% ▲	4% ▼
To / from doctor/dentist/pharmacy	8%	8%	5%	8%	4% ▼	7%
Take children to school/day care	5%	6%	8%	4%	5%	3%
To / from school, college, university	5%	3%	8% ▲	4%	8% ▲	9% ▲

Cycling significantly over-indexes to get to places of recreation, to get to and from school, college and university and to or from 'somewhere else'. But this mode significantly under-indexes for trips to shops, and as part of a job.

Walking is spread across occasions and there are no significant variations by trip type. The same goes for private vehicle.

Public transport typically features more strongly in commuter trips to work or place of study.

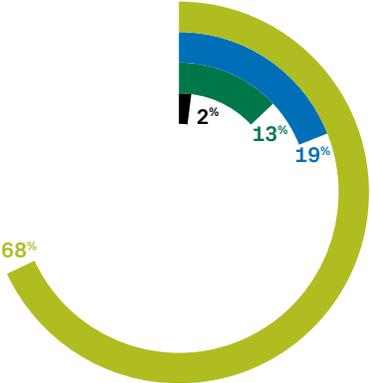
Q26. Thinking about the past week, how many times did you use each type of transport when traveling for these occasions?
 Base: 2021 n=4924
 Trips travelled in last week by mode
 *walking 100m or crossing the road

▲ Significantly higher than total ▼ Significantly lower than total

Regular motorized vehicle users have low overlap between modes

MODE USAGE OVERLAP – OTHER MODES USED AT LEAST ONCE A WEEK

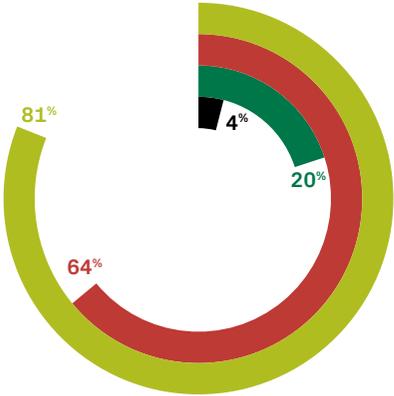
Motorised vehicles



Average number of modes used weekly

2.02

Public Transport



2.69

- Walking
- Motorised vehicle
- Cycling
- Public transport
- Other

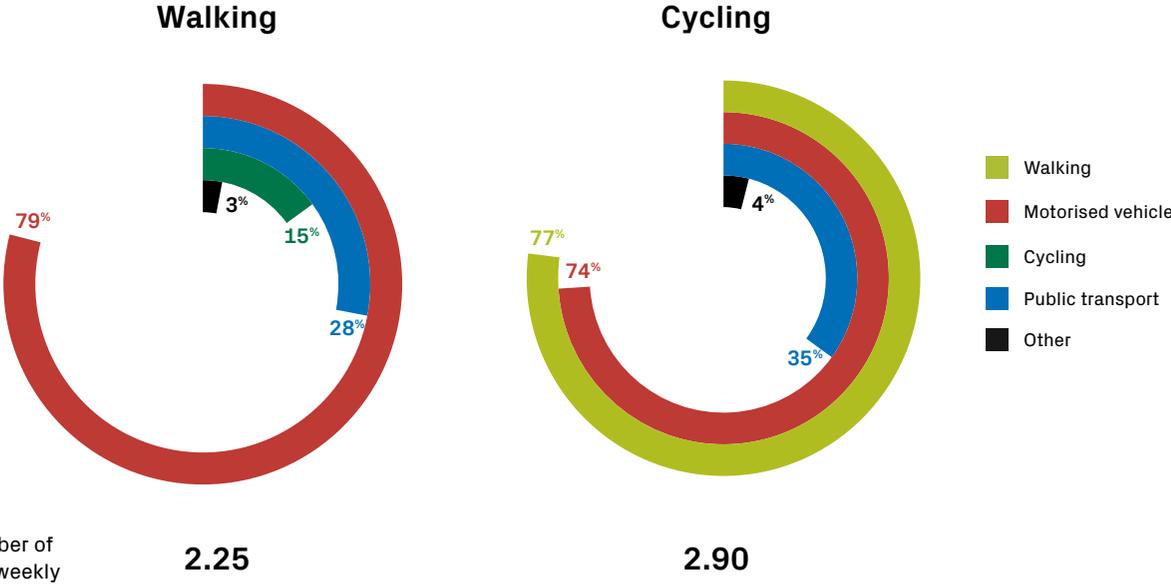
Motorised vehicles have the lowest overlap of modes with the average number of modes being 2.02 used weekly. They are most likely to also use walking 68%, and public transport 19%.

Public transport users have the highest overlap with walking 81% as well as cycling 20%. Of those who use public transport regularly 64% also use a motorised vehicle weekly.

Q24. On average, how often do you use each of the following modes of transport, for any reason Base: 2021 n= 4924
*walking 100m or crossing the road
NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter) NET: Cycling (Bicycle, Electric bike)
NET: Public Transport (Bus, Train, Ferry)

Regular cyclists have the greatest overlap between modes

MODE USAGE OVERLAP – OTHER MODES USED AT LEAST ONCE A WEEK



Cyclist have the higher overlap or mode usage with on average 2.9 modes used weekly. 74% of weekly cyclists also use motorized vehicles. 35% of people who cycle regularly also use public transport once a week.

Of people who regularly walk, 79% also use a motorized vehicle regularly. 28% of regular walkers will use public transport and 15% will use cycling as a weekly mode of transport.

Q24. On average, how often do you use each of the following modes of transport, for any reason Base: 2021 n= 4924
 *walking 100m or crossing the road
 NET: Motorised vehicle (Private or company motor vehicle, taxi/ride share, motorbike or scooter) NET: Cycling (Bicycle, Electric bike) NET: Public Transport (Bus, Train, Ferry)

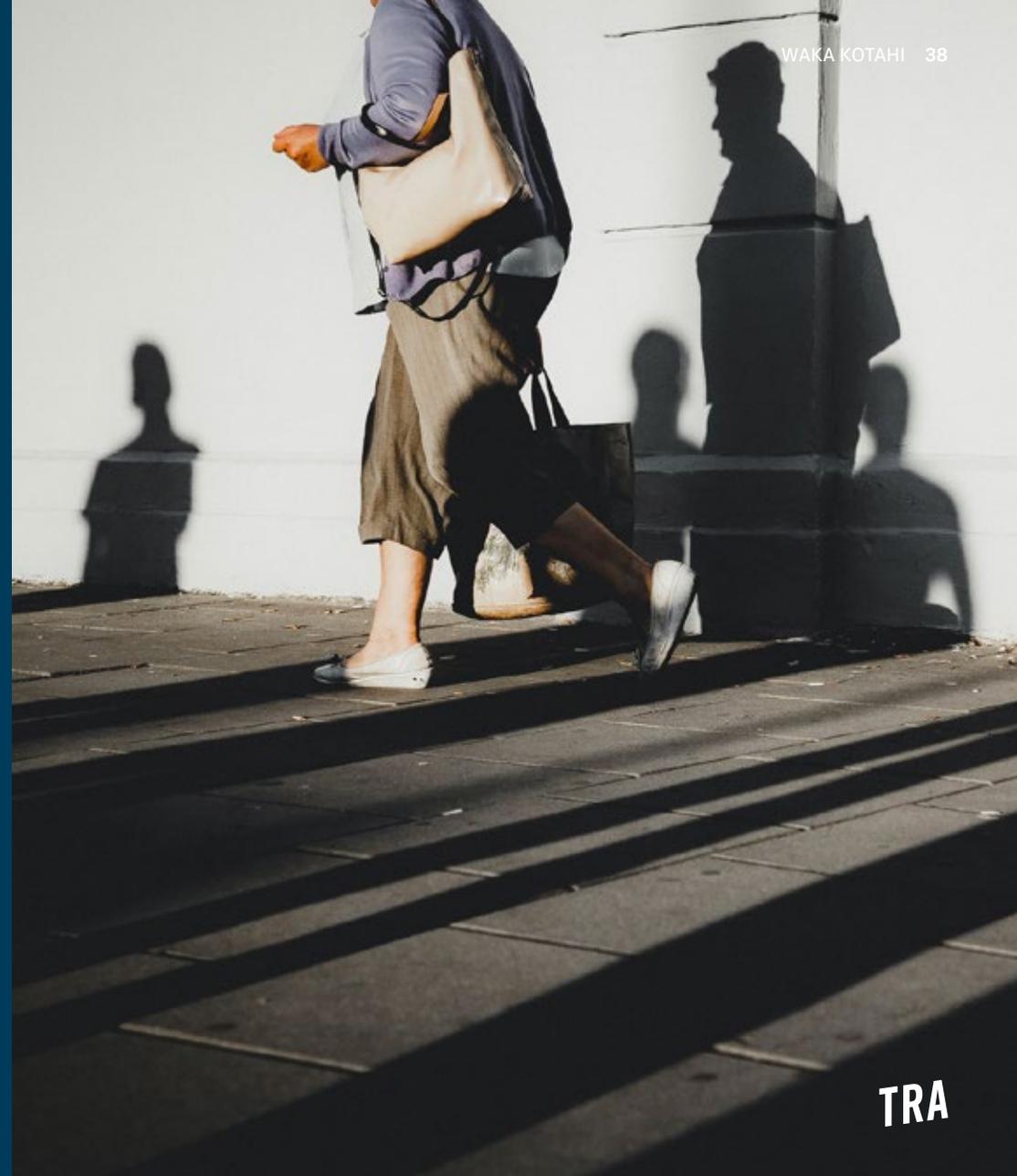
4

A closer look at walking

Summary: A closer look at walking

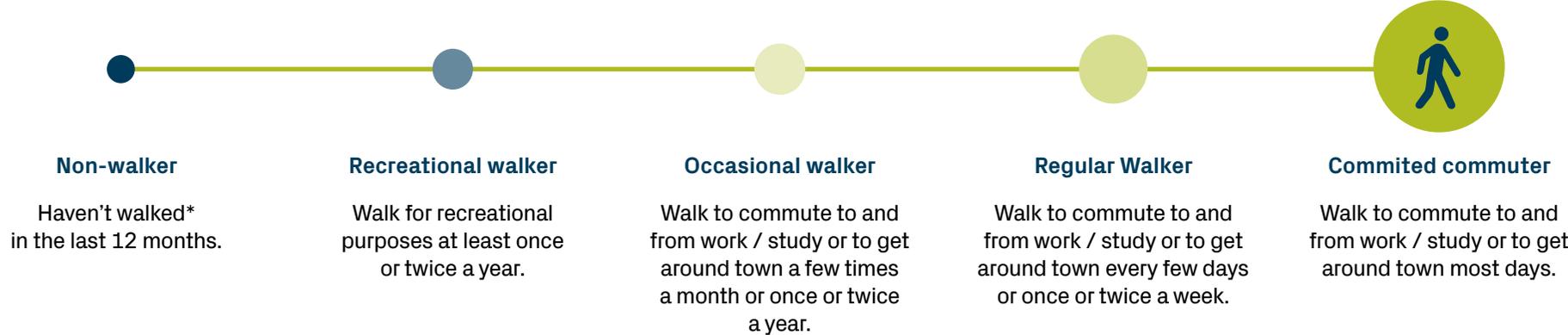
- Walking is something most people do, with 74% of urban New Zealanders walking* in the last 12 months. Walking levels have remained stable since previous periods.
- Levels of walking differ at a regional level; Hamilton has the lowest level of urban walking, while Wellington and Dunedin have the highest proportions walking.
- Men are over-represented in the non-walkers segment, while higher earners and NZ Europeans are under-represented.
- Perceptions around the safety of walking to school have decreased alongside signs that fewer such trips are made on foot.

*walking 100m or crossing the road



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

THIS IDENTIFIES WALKERS BASED ON HOW FREQUENTLY THEY TRAVEL BY FOOT FOR CERTAIN TRIPS



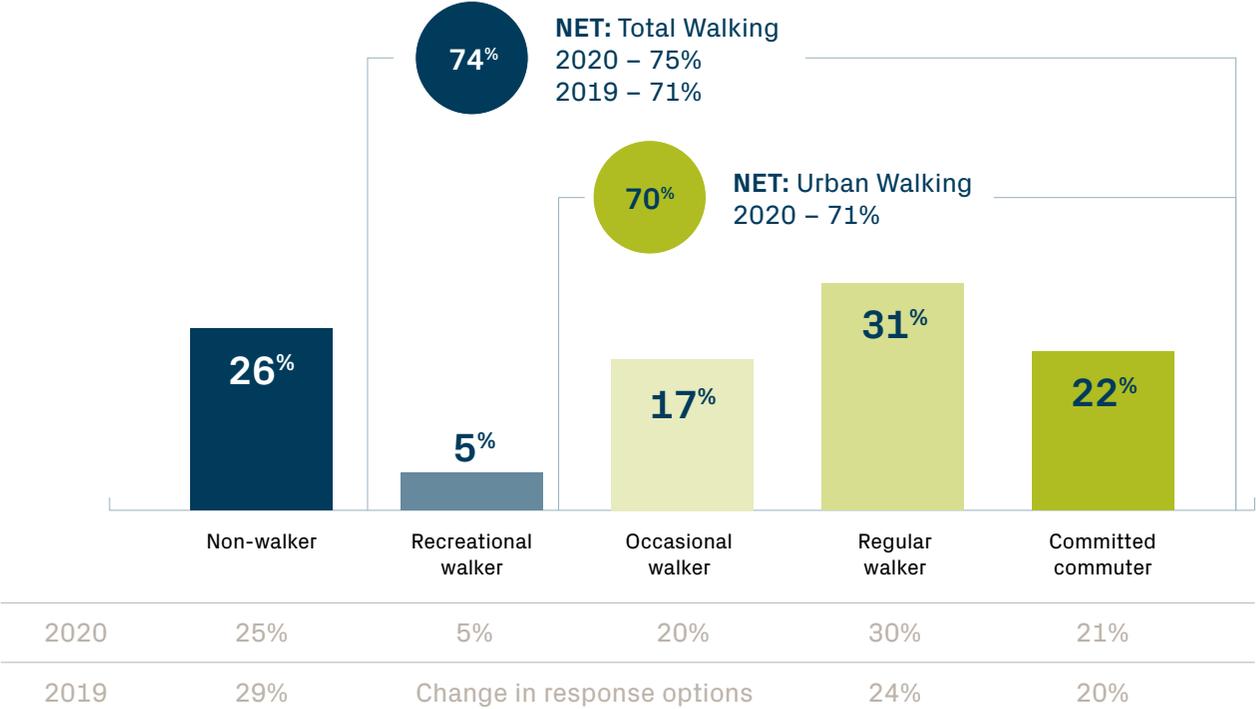
*walk for at least 100m and/or cross the road

Walking is a mode of travel most New Zealanders use



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

JAN-DEC '21



74% of urban New Zealanders choose to walk as a way of getting around. This has remained constant since 2020.

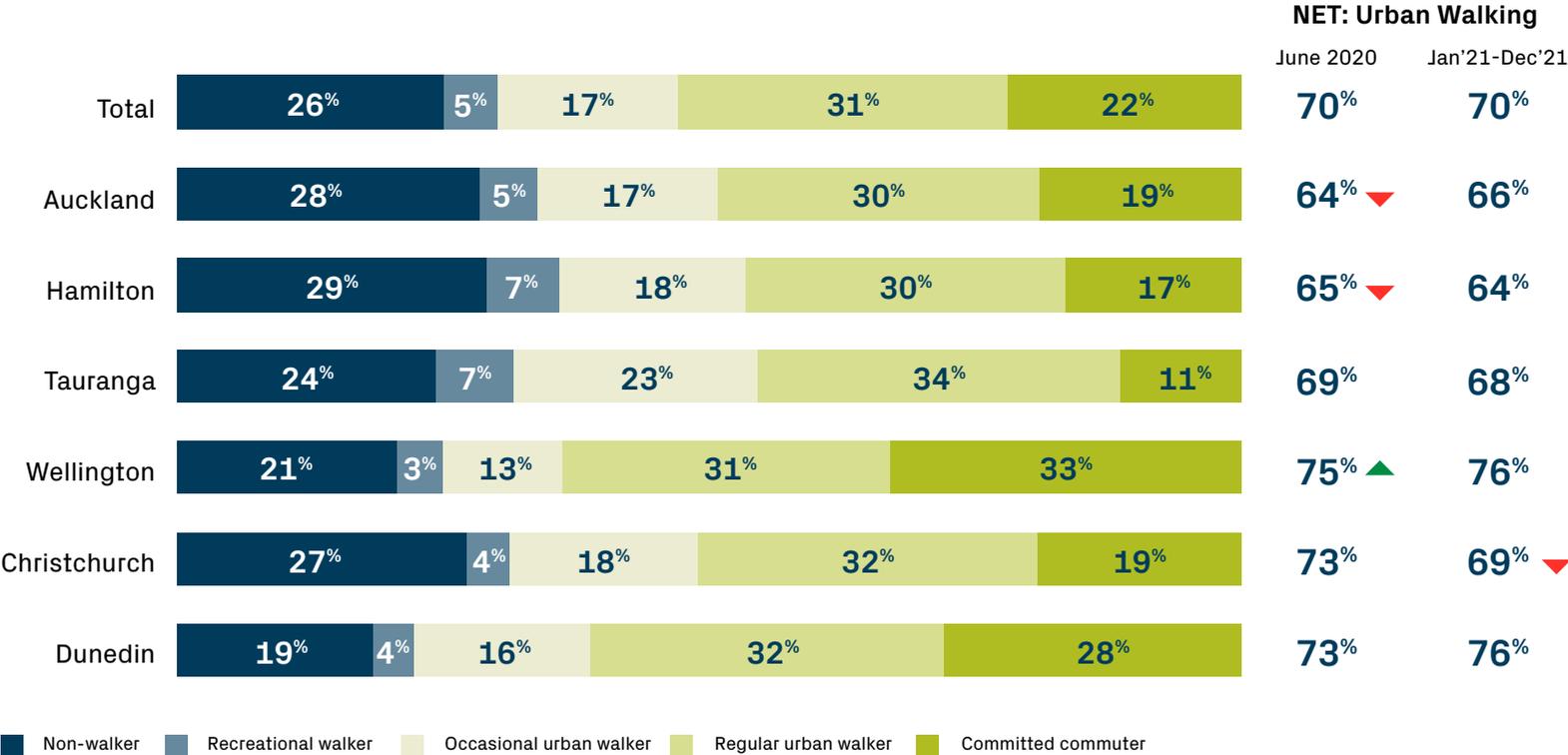
For walking, the challenge is less about getting people to walk in general but enabling walking as an option to replace trips which would otherwise be taken by vehicle.

Q23a. Which of the following have you used in the past 12 months?
 W2. How often do you travel by foot... To commute to and from work/study, To get around town – to run errands, to go to shops, visit family, friends etc, For recreational purposes. Base: Total sample, 2020 n=2,256, 2021 n=4,924
 *Walk for at least 100m and/or cross the road.
 Changes made to response options which impact ability to compare recreational walker and occasional urban walker.



Wellington and Dunedin have the highest levels of walking

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



Q23a. Which of the following have you used in the past 12 months?
 W2. How often do you travel by foot... To commute to and from work/study, To get around town – to run errands, to go to shops, visit family, friends etc. For recreational purposes. Base: Total sample, 2020 n=2,256, 2021 n=4924, Auckland n=1143, Hamilton n=582, Tauranga n=563, Wellington n=1035, Christchurch n=1032, Dunedin n=555
 Changes made to response options which impact ability to compare recreational walker and occasional urban walker.

▲ Significantly higher than prior year

▼ Significantly lower than prior year

The profile of walkers differs across the segmentation framework

WALKING SEGMENTATION PROFILING -JAN-DEC 2021

	Total	Not currently walking	Recreational walker	Occasional walker	Regular urban walker	Committed commuter
18-34	33%	32%	14% ▼	32%	36%	36%
35-54	34%	36%	34%	33%	32%	35%
55+	33%	33%	52% ▲	36%	32%	30%
Male	48%	55% ▲	52%	45%	48%	44%
Female	51%	45% ▼	48%	55%	52%	56%
Pakeha/NZ Euro	69%	64% ▼	79% ▲	70%	72%	68%
Māori	10%	13%	3% ▼	9%	10%	9%
Pacific	3%	4%	1%	1% ▼	2%	3%
Asian	16%	16%	7% ▼	16%	15%	17%
Less than \$50k	27%	30%	29%	21% ▼	28%	23%
\$50k-\$99k	31%	30%	29%	33%	29%	33%
\$100k or more	30%	25% ▼	28%	34% ▲	30%	32%

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

Who isn't walking?

Those not currently walking are more likely than average to be male and less likely to identify as NZ European. Non-walkers are also less likely to have an annual household income of \$100k or more.

▲ Significantly higher than total ▼ Significantly lower than total

Q23a. Which of the following have you used in the past 12 months?

W2. How often do you travel by foot... To commute to and from work/study, To get around town – to run errands, to go to shops, visit family, friends etc, For recreational purposes.

* Walk for at least 100m and/or cross the road Base: Total 2021 n=4,924 Not currently walking n=1339, Recreational walker n=232, Occasional urban walker n=837, Regular urban walker n=1440, Committed commuter n=1076

Within walking to school, there has been a shift across modes, with fewer people walking to school

WALKING TO SCHOOL - % SHARE MODES

	Jun-20	Jan-Dec-21	Change
Motorised Vehicle	58%	53%	-5%
Public Transport	8%	9%	+1%
Walking	28%	26%	-2%
Cycling	2%	5%	+3%
Another mode	2%	3%	+2%

Within school drop-off and pick-up trips, we see a shift away from private vehicle to alternative modes.

Although motorized vehicle still represents the dominant mode, there was a slight dip in 2021, with attendant increases in most other modes. Walking to school is, however, showing signs of a decrease. Although only slight when looking at 2021 continuous data, the change is significant when we compare June 2021 with June 2020 (down 8 percentage points).

Note: Previous research period was conducted following schools reopening on May 18 2020.

Q26. Thinking about the past week, how many times did you use each type of transport when traveling for these occasions?
 Base: Total sample, 2018 n=2,115, 2019 n=2,174, 2020 n=2,256, 2021 n=4924
 *Walking 100m or crossing the road
 Changes to question structure and wording

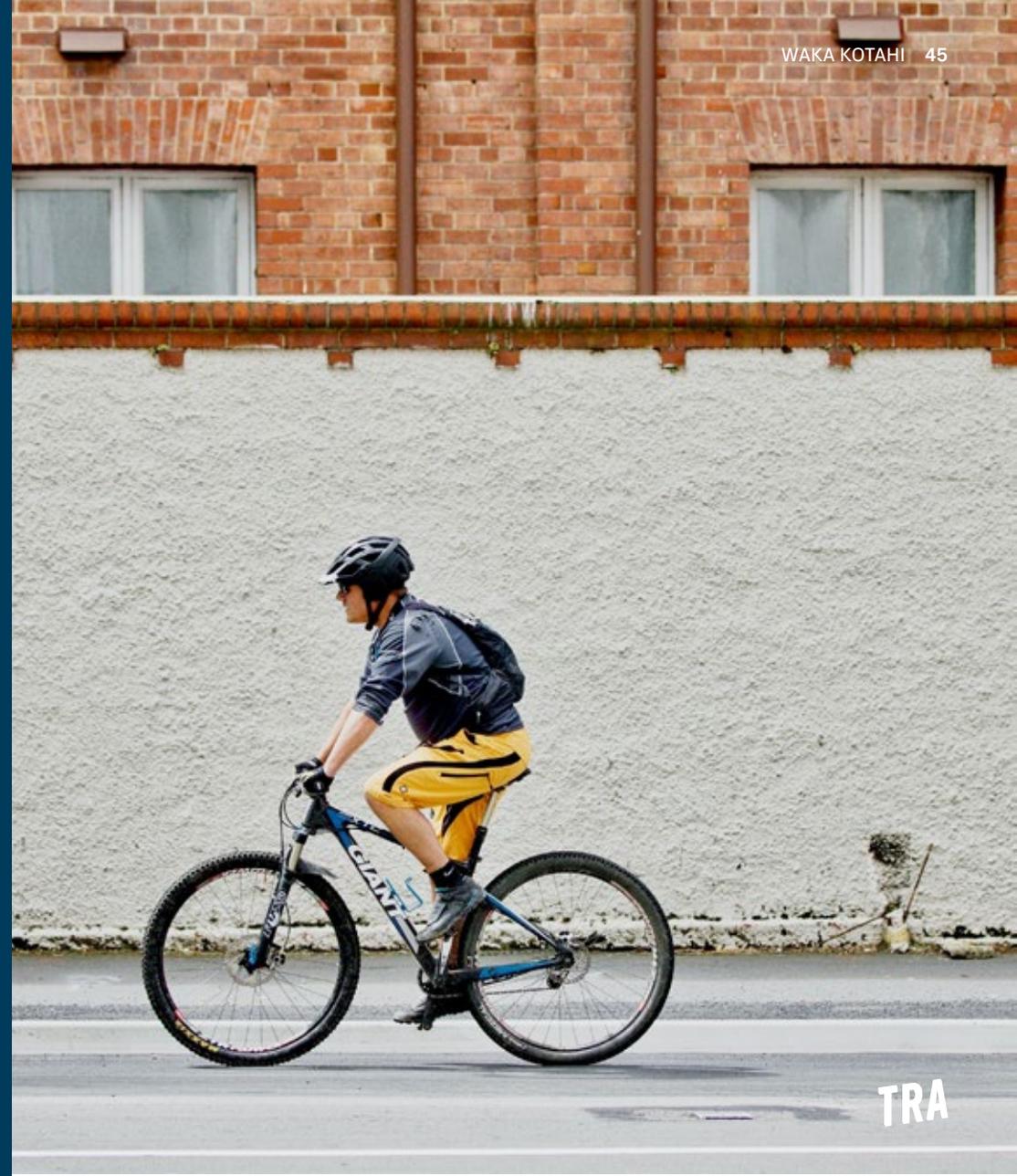
5

A closer look at cycling

TRA

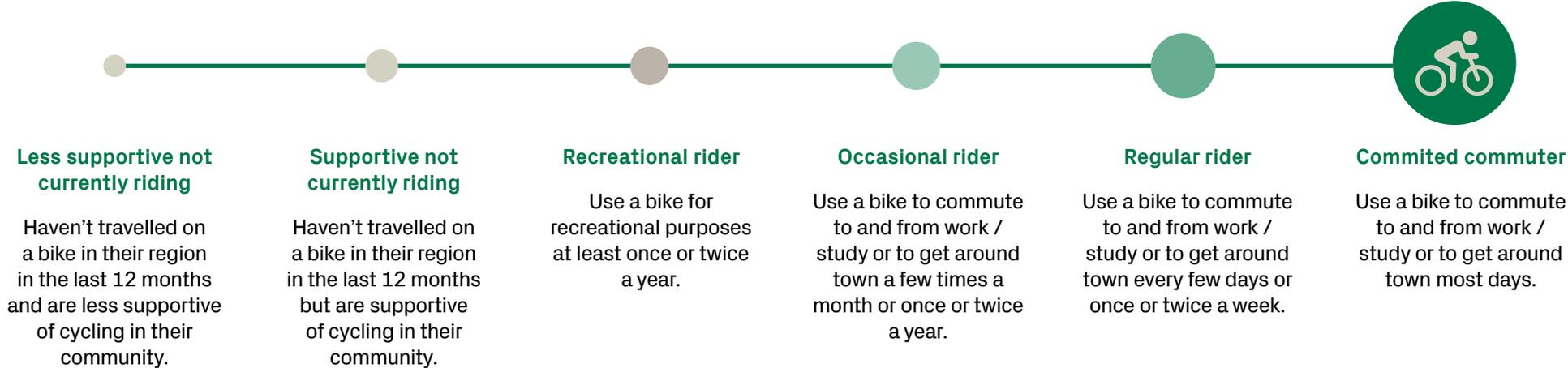
Summary: A closer look at cycling

- One-quarter of urban New Zealanders have cycled in the past year and 20% are riding at least occasionally.
- Overall, there has not been a significant change in the proportion of people cycling since 2020, but the frequency with which people cycle has increased.
- 50% of New Zealanders have access or own a bike in 2021.
- The majority of those who are not currently riding are supportive of cycling in their communities. There are 28% of New Zealanders who are non-cyclists and less supportive, and this has increased since 2020.
- Cycling levels differ at a regional level; Dunedin and Wellington have the lowest level of current cyclists. Although relatively low participation rates, the levels of cycling in Dunedin have significantly increased from 2020. Urban cycling shows particular strength in Hamilton, and Christchurch.



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

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



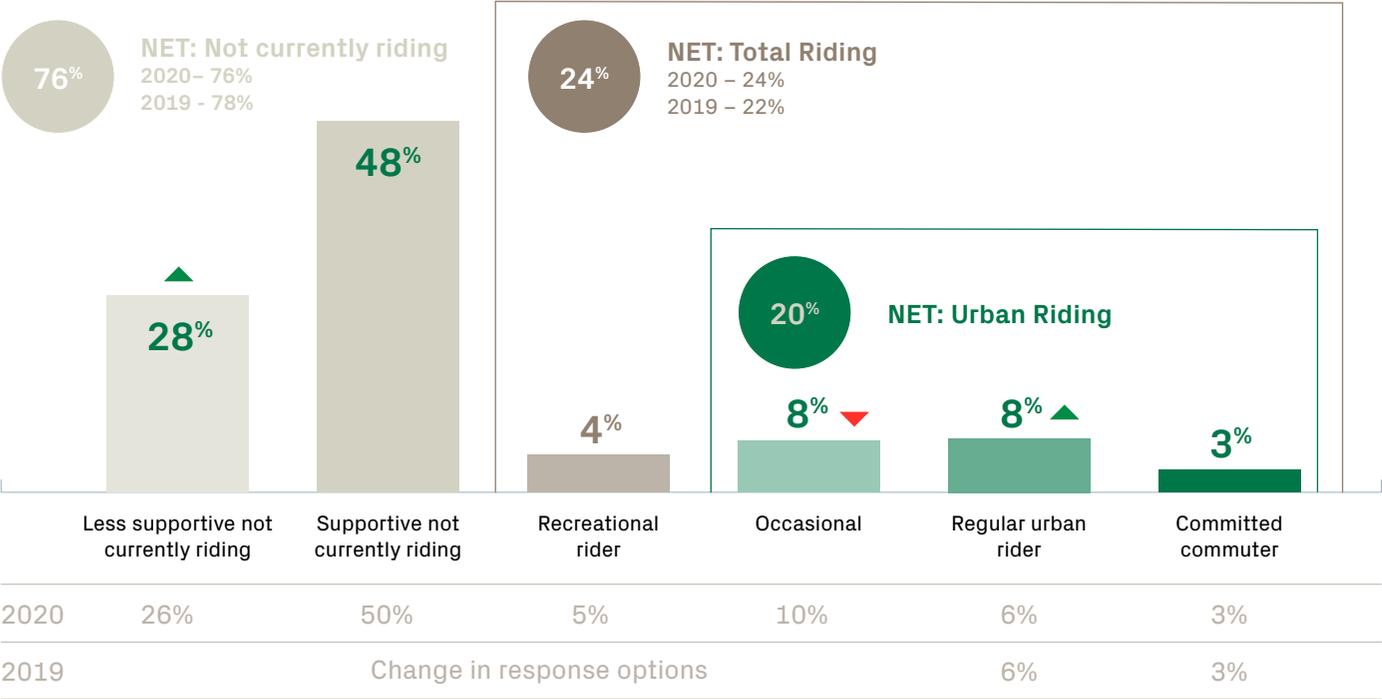
*walk for at least 100m and/or cross the road



Levels of cycling are stable, with one-quarter of urban New Zealanders having cycled in the past year

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

JAN-DEC '21



Compared to 2020, overall participation levels in cycling are stable.

There are, however, signs of increased cycling frequency. Levels of regular urban riders have significantly increased since 2020 while occasional urban riders have significantly decreased.

Those who haven't cycled in the last 12 months account for three-quarters of urban New Zealanders.

Among non-cyclists, those less supportive of this mode are more likely than average to be aged 55 and over, female and from Wellington.

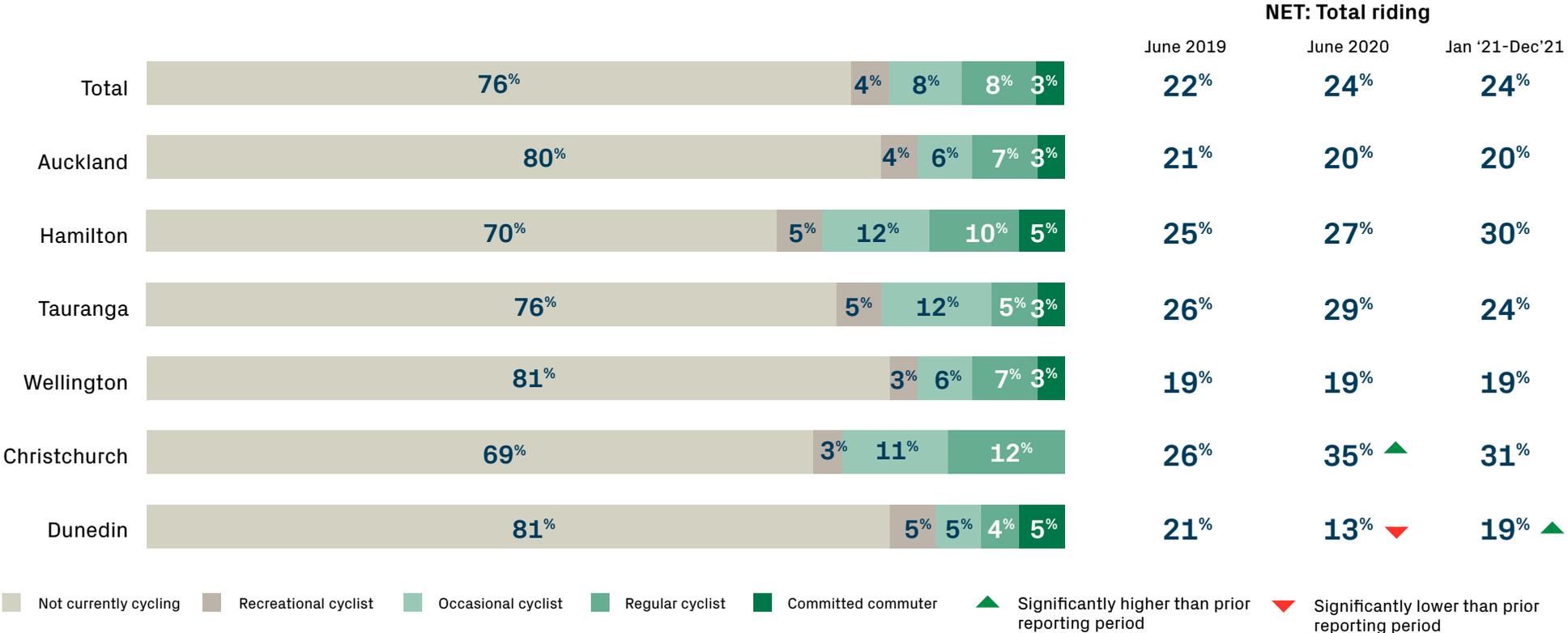
Q23a. Which of the following have you used in [REGION] in the past 12 months? Q6. How often do you currently ride a bicycle or e-bike? Base: 2021 n=4924
Changes made to response options which impact ability to compare not currently riding, recreational riders and occasional riders

▲ Significantly higher than 2020 ▼ Significantly lower than 2020



Across urban regions, Christchurch and Hamilton have the highest levels of cycling participation

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



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

▲ Significantly higher than prior reporting period
 ▼ Significantly lower than prior reporting period

The profile of riders differs across the cycling framework



CYCLING SEGMENTATION FRAMEWORK PROFILING – JAN-DEC'21

	Total	Not currently riding	Recreational riders	Occasional riders	Regular riders	Committed commuter
18-34	33%	32%	29%	40%	39%	28%
35-54	34%	31%	50% ▲	36%	42% ▲	55% ▲
55+	33%	37% ▲	22% ▼	24% ▼	19% ▼	17% ▼
Male	48%	44% ▼	44%	57% ▲	72% ▲	67% ▲
Female	51%	55% ▲	56%	42% ▼	28% ▼	33% ▼
Pakeha/NZ Euro	69%	69%	76%	73%	65%	63%
Māori	12%	10%	4% ▼	11%	9%	19% ▲
Pacific	5%	3%	0% ▼	2%	4%	5%
Asian	13%	16%	11%	15%	19%	9% ▼
Less than \$50k	28%	28%	14% ▼	17% ▼	31%	20%
\$50k-\$99k	29%	31%	28%	38%	23% ▼	30%
\$100k or more	30%	27% ▼	45% ▲	38% ▲	36%	42%

Those who are more likely to cycle are:

- Middle-aged (35-54)
- Male

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

- Older (55+)
- Female
- Lower income

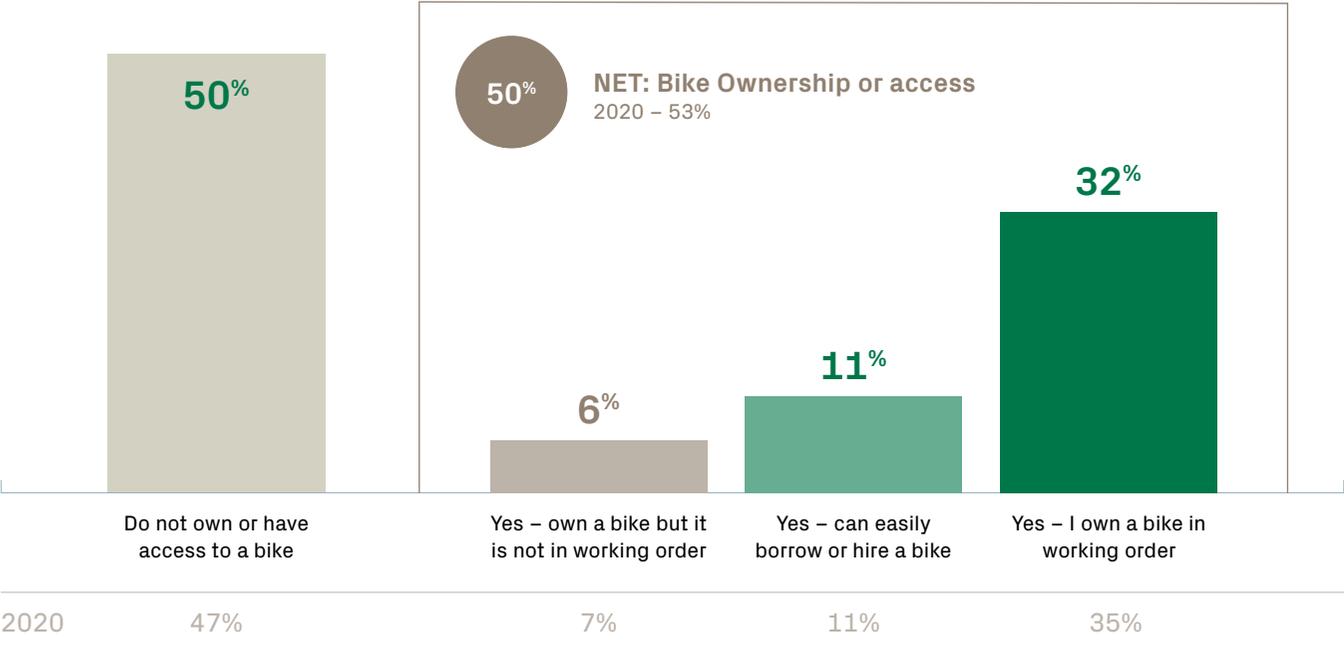
▲ Significantly higher than total ▼ Significantly lower than total

Q23a. Which of the following have you used in [REGION] in the past 12 months? Q6. How often do you currently ride a bicycle or e-bike?
 Base: Total n=4924, Not currently riding n=3,790, Recreational riders n=188, Occasional riders n=411, Regular riders n=343, Committed commuters n=192

Half of all urban New Zealanders have access to or own a bike



BIKE OWNERSHIP/ACCESS- JAN-DEC'21



Ownership and access to bikes (among those identifying as not having a disability) has been decreasing over time.

Those who own/have access to a bike are more likely to be:

- Younger (18-34)
- Male
- Families

Those who don't have access or own a bike are more likely to be:

- Older (55+)
- Female
- Lower income

Q2: Do you own or have access to a bicycle you could easily use
Base: n=4194

Cyclists are most likely to identify as leisure cyclists



CYCLIST ASSOCIATIONS – JAN-DEC'21

Leisure Cyclist



Casual Cyclist



Regular Commuter



Faster Commuter



Family Group



Road Cyclists



School Student



Group Road Cyclist



Leisure cyclists have significantly decreased since 2019*. Faster Commuters and School students has significantly increased since 2019*.

Family group cyclists are significantly more likely to be female.

Faster commuters and group road cyclists are significantly more likely to be males.

Q18. Below are some images of cyclists. Which of the following would best relate to the type of cyclist you are?
*This question was not asked in 2020.
Base: Total cyclists n=1180

▲ Significantly higher than previous period

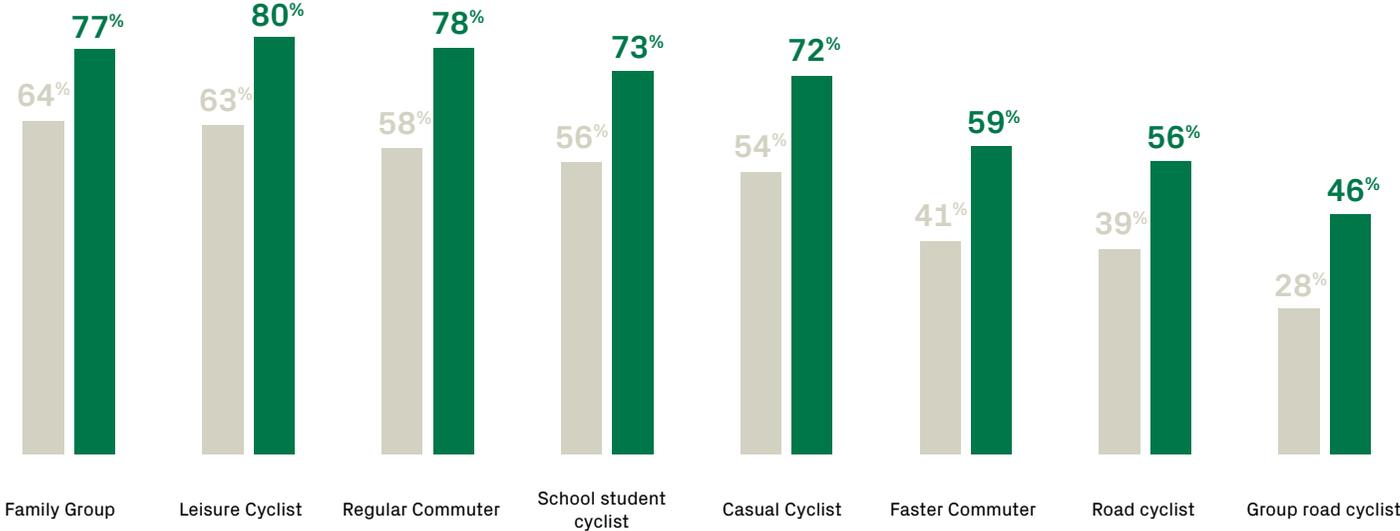
▼ Significantly lower than previous period



Non cyclists have the highest positive association with family and leisure cyclists

The greatest gap in positive associations for cyclists and non cyclists is for regular commuters.

POSITIVE ASSOCIATION WITH GROUPS (VERY OR SOMEWHAT POSITIVE)



Q20. On the scale below, please select which best represents how you feel about each of the following types of cyclists.
Base: Total cyclists n=1180, Total non cyclists n=3,744

Not Cyclists Cyclists

6

A closer look at E-mobility

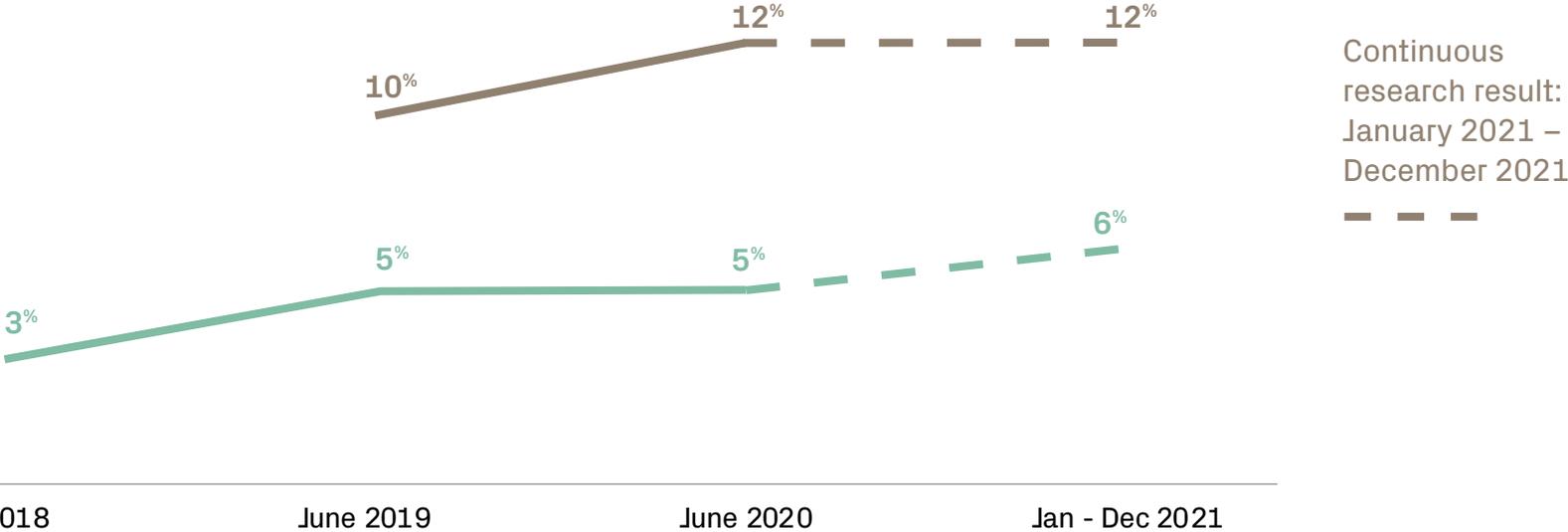
Summary: A closer look at E-mobility

- E-scooters and E-bikes are used by a growing minority: in 2021, 12% of urban New Zealanders had used an e-scooter in the past year and half this proportion an e-bike.
- Levels of weekly usage for both modes have doubled from 2% in 2019 to 4% in 2021.
- Users of these modes skew to younger men from higher earning households.
- There is relatively low crossover between the two main types of E-mobility: most E-scooter users don't use E-bikes and vice versa.
- E-bike usage is highest in Hamilton while E-scooters are most prevalent in Christchurch.



E-bike and E-scooter usage has been increasing over time

PAST YEAR USAGE



Q23a. Which of the following have you used in the past 12 months?
E-scooters 2021 n=540, 2020 n=269 E-bikes 2021 n=315 2020 n=112

Escooters were not included in 2018 survey

■ E-Bike ■ E-Scooter

Frequency of use has also been increasing

USAGE AT LEAST ONCE A WEEK

Continuous research result:
January 2021 – December 2021



Q24. On average, how often do you use each of the following modes of transport, for any reason
Base: E-bikes 2021 n=107, 2020 n=195 E-scooters 2021 n=119, 2020 n=190

E-Bike E-Scooter

They are relatively discrete user groups: there’s not a big overlap between E-modes

USAGE OVERLAP JAN 2021 - DEC 2021

PAST 12 MONTH USAGE	Electric bike [E-bike]	Electric scooter [E-scooter]	USAGE AT LEAST ONCE A WEEK	Electric bike [E-bike]	Electric scooter [E-scooter]
Electric bike [E-bike]	100%	16%	Electric bike [E-bike]	100%	23%
Electric scooter [E-scooter]	32%	100%	Electric scooter [E-scooter]	25%	100%

Q23a. Which of the following have you used in the past 12 months?
E-scooters 2021 n=540, 2020 n=269 E-bikes 2021 n=315 2020 n=112

Q24. On average, how often do you use each of the following modes of transport, for any reason
Base: E-bikes 2021 n=107, 2020 n=195 E-scooters 2021 n=119, 2020 n=190

E-bike and E-scooter usage both skew towards higher income households and males

E-BIKE AND E-SCOOTER PROFILING JAN-DEC 2021

	Total	E-BIKE		E-SCOOTER	
		Weekly	Last 12M	Weekly	Last 12M
18-34	33%	42%	42%	51% ▲	59% ▲
35-54	34%	32%	35%	38%	33%
55+	33%	25%	23% ▼	11% ▼	8% ▼
Male	48%	73% ▲	66% ▲	67% ▲	56%
Female	51%	27% ▼	34% ▼	33% ▼	44%
Pakeha/NZ Euro	69%	68%	66%	60%	70%
Māori	10%	13%	12%	16%	16%
Pacific	2%	3%	3%	5%	3%
Asian	15%	13%	16% ▼	20% ▲	15%
Less than \$50k	27%	19%	17%	13%	21%
\$50k-\$99k	31%	30%	32%	38%	30%
\$100k or more	30%	42% ▲	42% ▲	45% ▲	42% ▲

E-bike users are significantly more likely to be:

- Male
- From higher earning households

E-scooter users are significantly more likely to be:

- Under 35
- From higher earning households

Among weekly users, the skew toward male users is particularly pronounced.

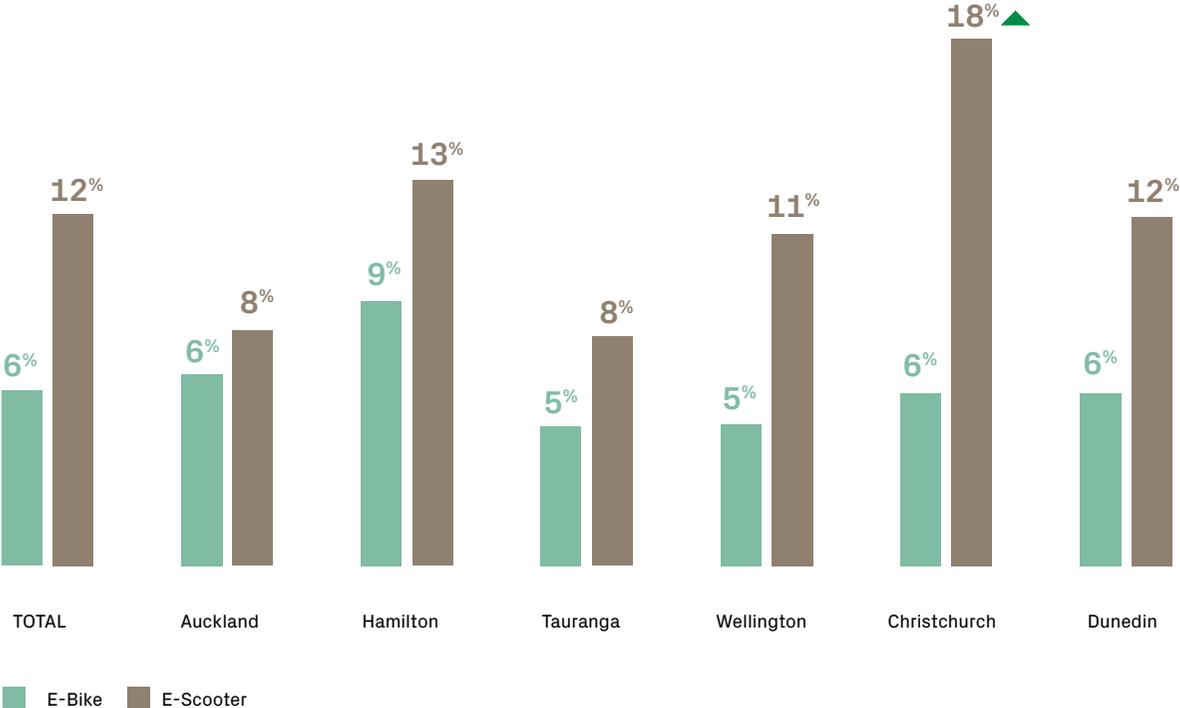
▲ Significantly higher than total ▼ Significantly lower than total

Q23a. Which of the following have you used in the past 12 months?
E-scooters 2021 n=540, 2020 n=269 E-bikes 2021 n=315 2020 n=112

Q24. On average, how often do you use each of the following modes of transport, for any reason
Base: E-bikes 2021 n=107, 2020 n=195 E-scooters 2021 n=119, 2020 n=190

Christchurch has the highest levels of E-scooter usage

PAST 12M USAGE – JAN'21-DEC'21



Q23a. Which of the following have you used in the past 12 months?
E-scooters 2021 n=540, 2020 n=269 E-bikes 2021 n=315 2020 n=112

▲ Significantly higher than total

▼ Significantly lower than total

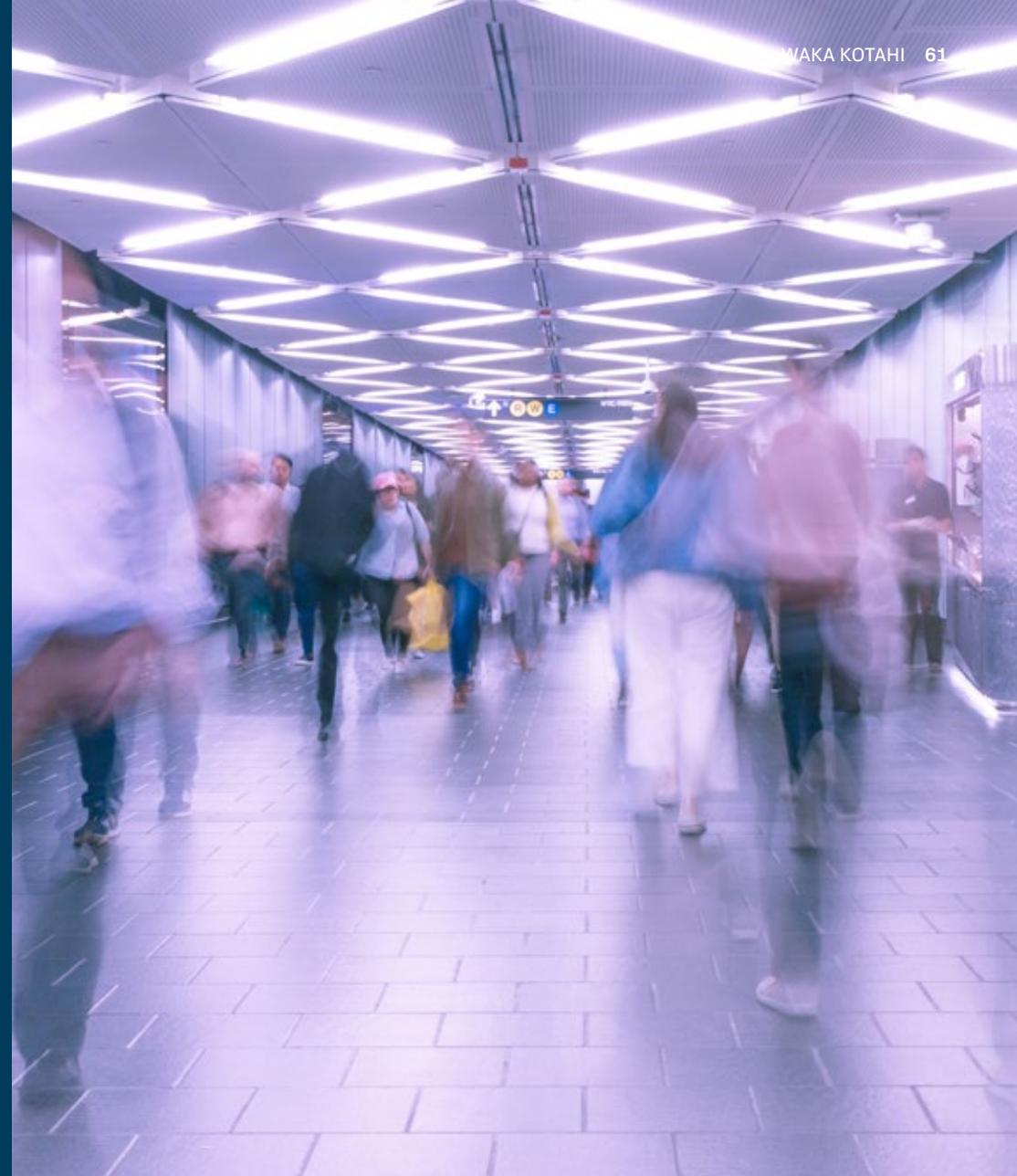
7

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

TRA

Summary: Walking

- Barriers to walking remain consistent over time, with the most prominent barriers relating to safety concerns walking in the dark and convenience, with perceptions that walking is not a quick way to travel.
- Walking barriers are generally more prominent in Auckland, Hamilton and Tauranga.
- Overall over 8 in 10 feel safe walking, but this perception decreased significantly in 2021.
- Satisfaction with walking infrastructure was maintained into 2021: at least three-quarters of urban New Zealanders are satisfied with the amount of stair-free footpaths, marked pedestrian crossings, footpaths / shared use paths and way-finding.



Summary: Cycling

- Barriers to cycling tend to focus on safety – particularly from drivers and cycling in the dark. But logistical barriers also come into play; one-third of people mention having too much to carry and the same proportion mention the weather as a barrier.
- Overall safety perceptions for cycling are stable: in 2021, 55% of urban New Zealanders perceive cycling as safe. There is significant variation across the regions, with perceptions lowest in Auckland and Wellington and highest in Hamilton and Christchurch.
- 31% of urban New Zealanders are aware cyclists are encouraged to take the lane and, once aware, around two-thirds support this. Around 4 in 10 cyclists report taking the lane in certain situations most or all of the time.
- In recent years, there has been continual development and improvements made to cycling infrastructure across New Zealand. This continues to play a key role encouraging cycling, and in 2021, satisfaction with infrastructure is stable following a significant uplift in 2020.



Safety of walking in the dark remains the top barrier to walking

BARRIERS TO WALKING – JAN-DEC 2021



SAFETY 

31%

I don't feel safe walking in the dark
(Males 19%, Females 43%)

EASE AND ACCESS 

27%
I live too far away for it to be practical

30%
Walking is not a quick way for me to get where I need to go

25%
Walking adds too much time to my journey

LOGISTICS 

24%
It's not enjoyable because of the weather

27%
I always have too much to carry

The barriers show a consistent picture to 2019 and 2020.

Safety of walking in the dark is significantly higher for females than males.

Males on average list 2.0 barriers, whereas females on average list 2.6 barriers to walking.

Q34A. Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you?
Base: Physically able to walk n=4,141.
No change to question wording and response options. Question order changed

Barriers to walking are more prominent in Auckland, Hamilton and Tauranga



BARRIERS TO WALKING BY REGION – JAN-DEC 2021

	Total	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
I don't feel safe walking in the dark	31%	36% ▲	39% ▲	34%	27% ▼	31%	21% ▼
Walking is not a quick way for me to get where I need to go	30%	29%	32%	38% ▲	26% ▼	31%	28%
I live too far away for it to be practical	27%	29%	28%	25%	26%	29%	22% ▼
Walking adds too much time to the journey	25%	26%	28% ▲	29% ▲	23%	24%	19% ▼

Safety tops the list in Auckland and Hamilton, but in Tauranga and Dunedin, walking taking too long is a more prominent barrier.

▲ Significantly higher than total ▼ Significantly lower than total

Q34A. Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you? Base: Physically able to walk n=4,141
 No change to question wording and response options. Question order changed
 Auckland n=951, Hamilton n=492, Tauranga n=474, Wellington n=890, Christchurch n=875, Dunedin n=450



Concerns around safety and logistics hold people back from cycling

BARRIERS TO CYCLING – JAN-DEC 2021



The barriers to cycling are consistent with 2019 and 2020.

Safety is a key perceived barrier to cycling, expressed by both cyclists and non-cyclists.

Males on average list 3.8 barriers, whereas females on average list 4.9 barriers to cycling.

Q11b. Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling, which of these statements, if any, apply to you? Base: Physically able to cycle n=4,194

Cycling barriers related to safety are higher in Auckland and Tauranga



SAFETY BARRIERS TO CYCLING BY REGION – JAN-DEC 2021

	Total	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
I don't feel safe because of how people drive	40%	44% ▲	35% ▼	42%	38%	41%	36%
I don't feel safe cycling in the dark	35%	38%	36%	40% ▲	31% ▼	36%	27% ▼
I'm concerned about the speed of other road users	33%	37% ▲	28% ▼	41% ▲	33%	31%	28% ▼

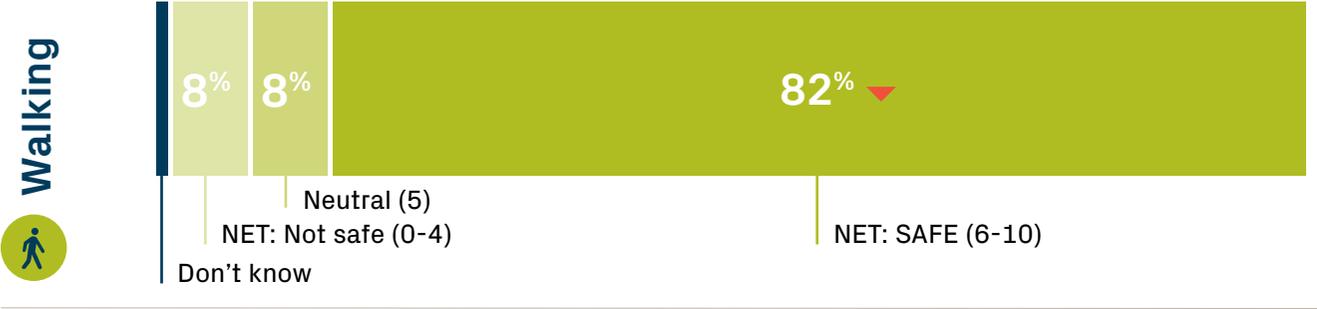
While there are notable differences in safety barriers, logistical barriers are relatively consistent across the regions.

▲ Significantly higher than total ▼ Significantly lower than total

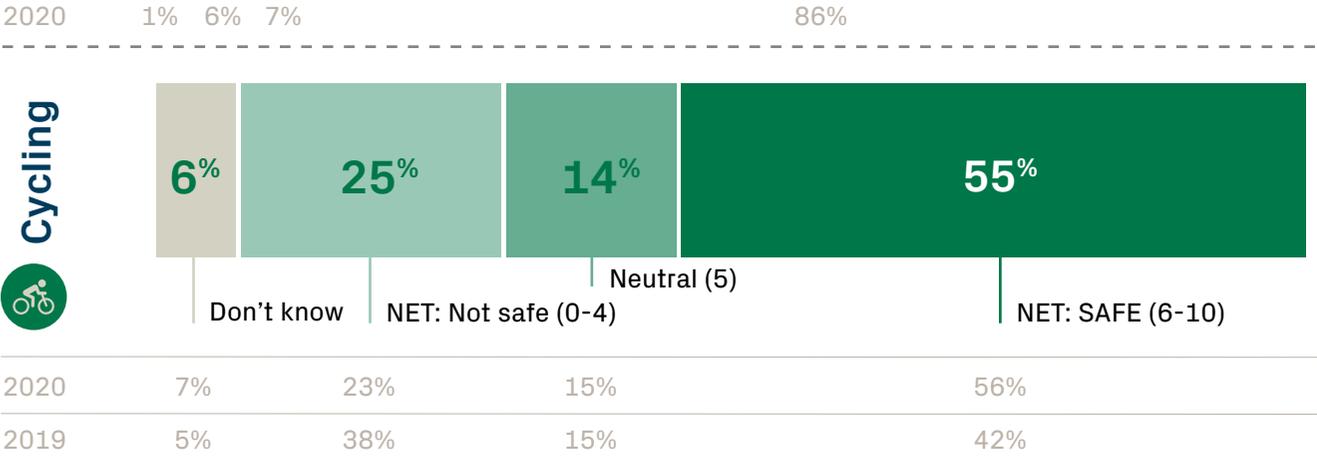
Q11b. Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling, which of these statements, if any, apply to you?
 Base: Physically able to cycle n=4,194, Auckland n=977, Hamilton n=501, Tauranga n=473, Wellington n=901, Christchurch n=866, Dunedin n=466

Perceptions of how safe walking is have declined overall but are stable for cycling

PERCEPTIONS OF SAFETY – % OF PEOPLE WHO FEEL SAFE WALKING / CYCLING (6-10) – JAN-DEC 21



Perceptions of walking being safe have significantly decreased by 4% points since June 2020.

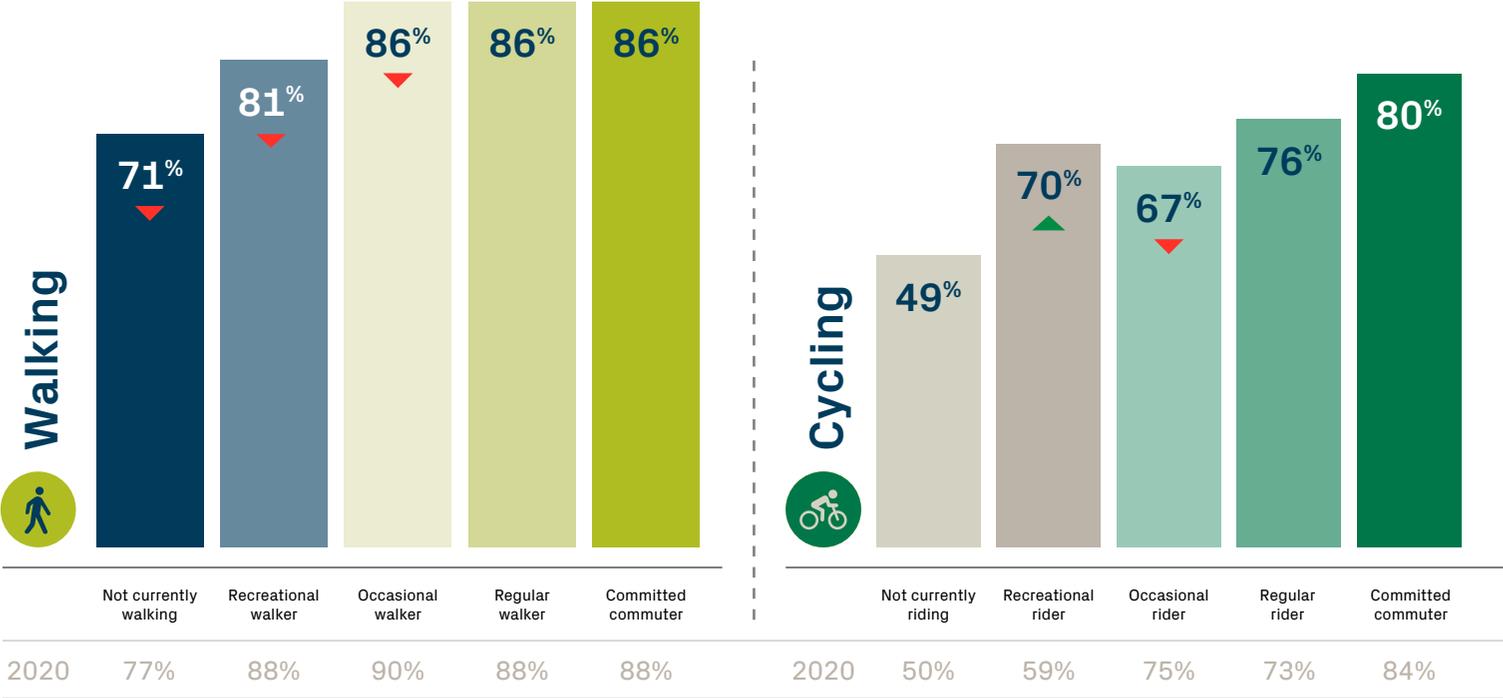


Q7A - In general, how safe are you/would you be walking in the [REGION] area? Base: Physically able to walk n=4,141
 A5 - In general, how safe are you/would you be, riding a bicycle in [REGION]? Base: Physically able to cycle n=4,194

▲ Significantly higher than 2020 ▼ Significantly lower than 2020

Those who don't walk or cycle have lower safety perceptions – this is more evident in cycling

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



Those who walk generally feel safe, this is highest for urban walker segments. Perception of safety for Non-walkers, Recreational walkers and Occasional walkers has significantly decreased since 2020.

For those who ride, Committed commuters generally feel the safest. Recreational riders' perception of safety has significantly increased since 2020 but Occasional rider perception has decreased.

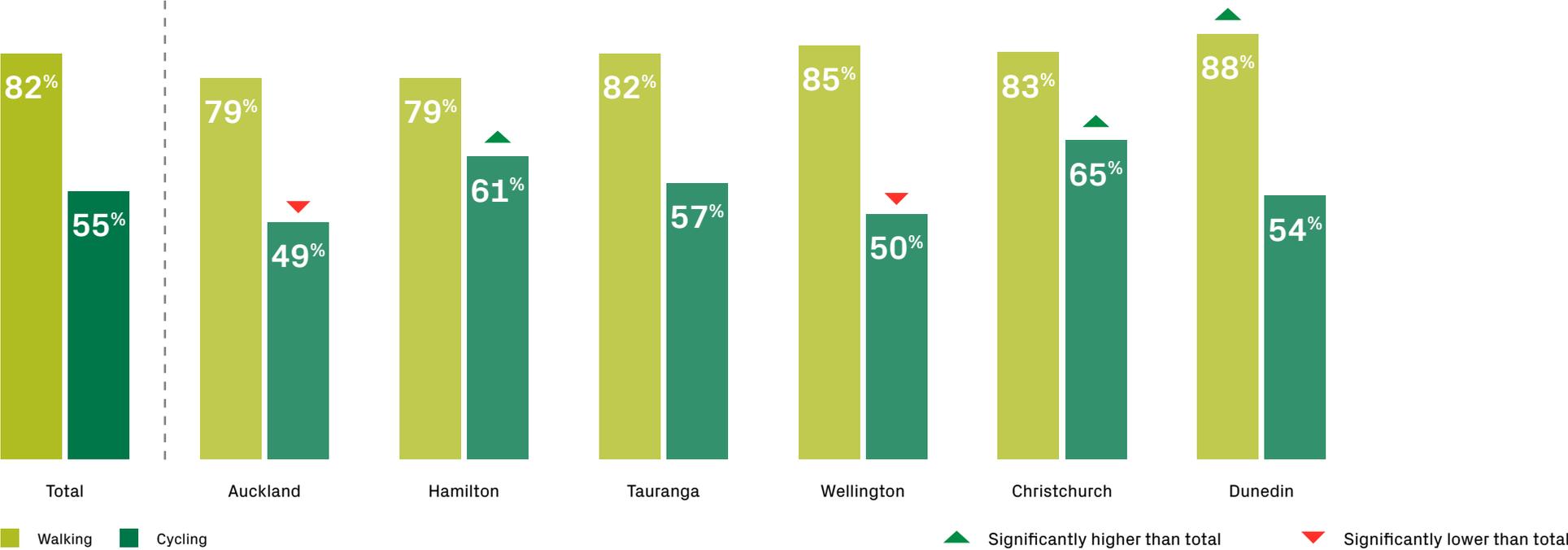
▲ Significantly higher than 2020

▼ Significantly lower than 2020

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 2021 n=4,141
 A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10] Physically able to cycle 2021 n=4,194

Perceptions of walking as safe are weakest in Auckland and Hamilton while perceptions of cycling as safe are lowest in Auckland and Wellington

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

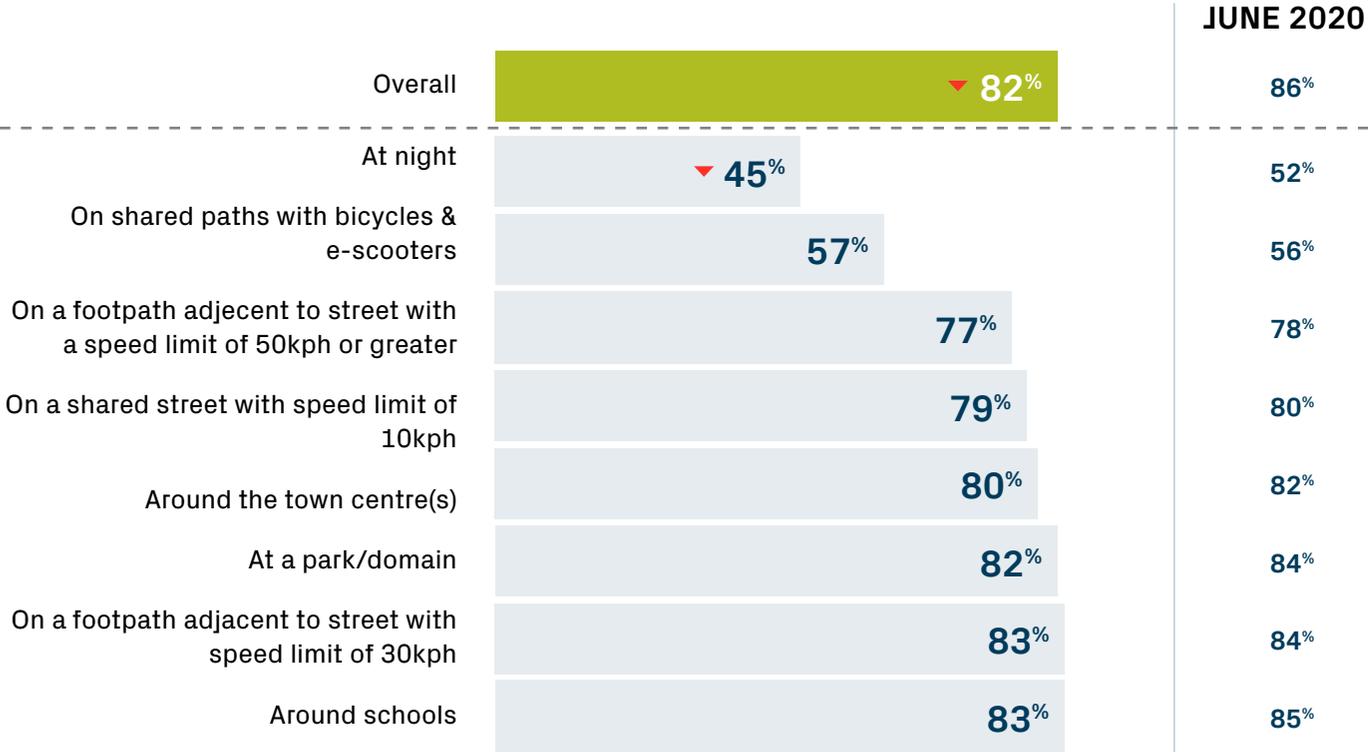


Q7A - In general, how safe are you/would you be walking in the [REGION] area? [NET Safe - 6-10 out of 10]
Base: Physically able to walk n=4,141, Auckland n=951, Hamilton n=492, Tauranga n=474, Wellington n=890, Christchurch n=875, Dunedin n=450
A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10]
Physically able to cycle n=4,194, Auckland n=977, Hamilton n=501, Tauranga n=473, Wellington n=901, Christchurch n=866, Dunedin n=466



For walking, the greatest declines in perceived safety are at night

PERCEPTIONS OF WALKING SAFETY JAN-DEC '21 – % OF PEOPLE WHO FEEL SAFE WALKING (6-10)



Regionally we see a consistent pattern that safety perceptions for walking are lowest at night. This concern is particularly pronounced for Hamilton (35%).

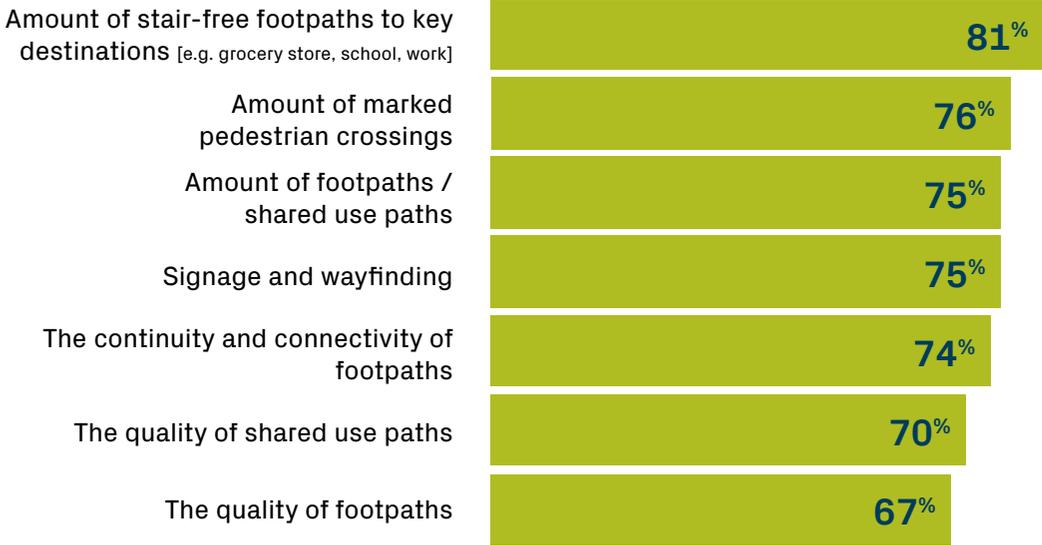
Q7A - In general, how safe are you/would you be walking in the [REGION] area? [NET Safe - 6-10 out of 10] Base: Physically able to walk 2021 n=4,141

▲ Significantly higher than 2020 ▼ Significantly lower than 2020

Satisfaction with walking infrastructure was maintained in 2021



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



JUNE 2020



Overall we see a pattern that Males and 18-34 are more satisfied with walking infrastructure.

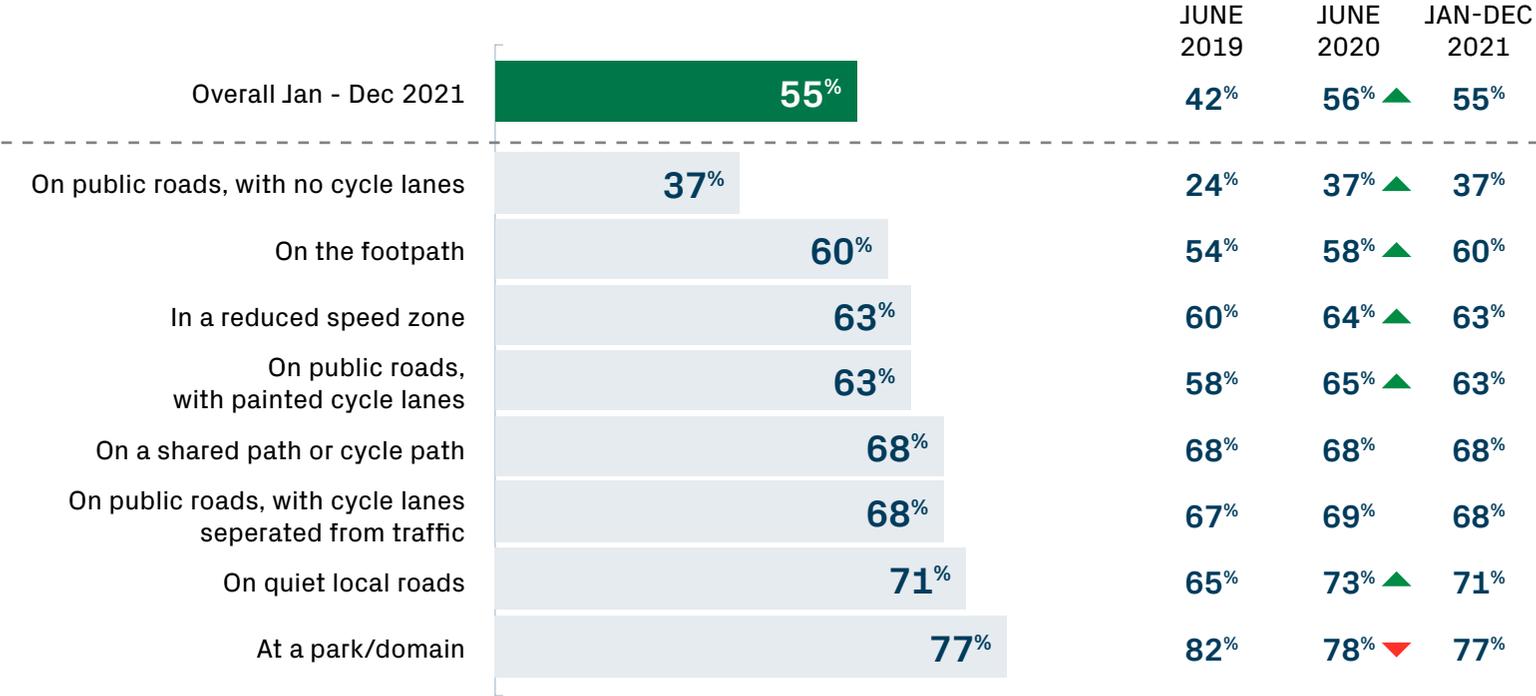
Q7A - In general, how safe are you/would you be walking in the [REGION] area? [NET Safe - 6-10 out of 10] Base: Physically able to walk 2021 n=4,141

▲ Significantly higher than 2019 ▼ Significantly lower than 2019

Perceptions of where people feel safest cycling are consistent with 2020



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



Safety perceptions of cycling increased significantly in 2020 and have since stabilised.

Safety perceptions are lowest on public roads with no cycle lanes.

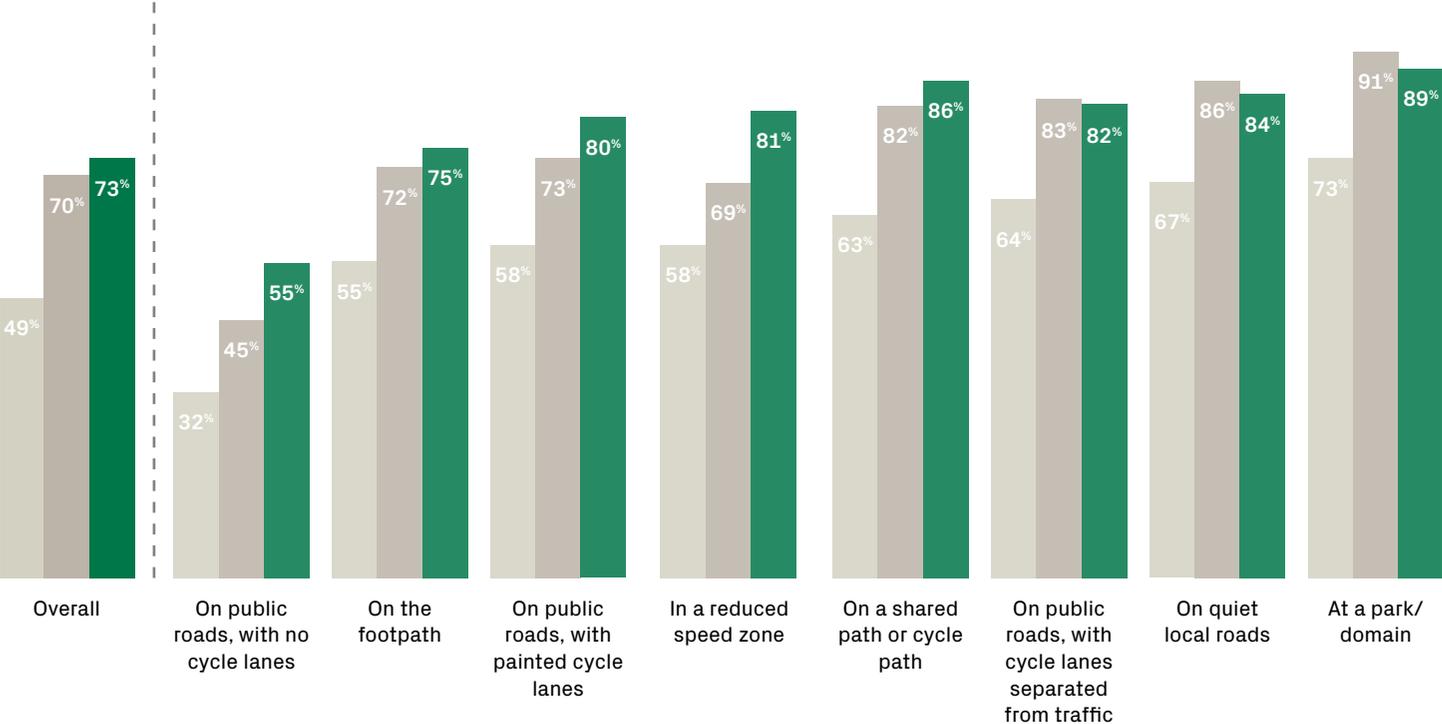
A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10] Base: Physically able to cycle n=4,194 No change to question wording and response options. Question order changed

▲ Significantly higher than 2020 ▼ Significantly lower than 2020

Urban riders have most confidence about safety



PERCEPTIONS OF CYCLING SAFETY IN DIFFERENT LOCATIONS BY SEGMENT –
 % OF PEOPLE WHO FEEL SAFE CYCLING (SCORING 6-10 OUT OF 10) JAN - DEC 2021



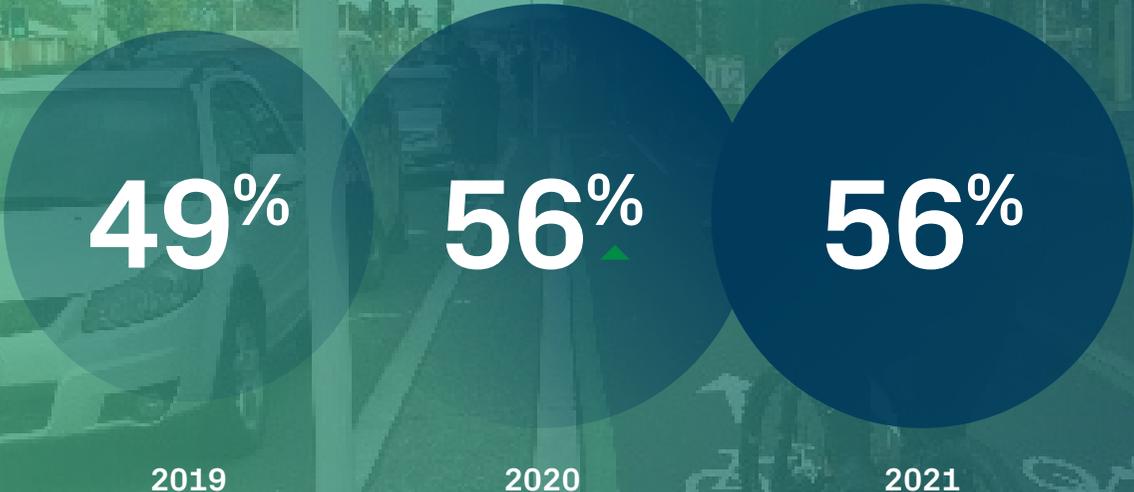
For both cyclists and non-cyclists, perceptions of safety increase significantly when a road has dedicated cycle lanes. In general, the greater the separation between vehicle and cyclist, the greater the sense of safety.

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

A5 - In general, how safe are you/would you be, riding a bicycle [NET Safe - 6-10 out of 10]
 Physically able to cycle 2021 n=4,194, Not currently riding n=3,175 Recreational rider n=181 Urban rider (Occasional rider, Regular rider, committed commuter) n=838



The development of infrastructure continues to play a key role in encouraging cycling



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

Overall agreement cycleways encourage people to cycle more has remained stable since the increase in 2020.

Regionally, agreement is highest in Hamilton (62%) and lowest in Tauranga (51%).

Agreement is highest for those aged 18-24 (73%) and lowest for those aged 65 and over (42%).

Q7 - Now please think about walking and cycling in general. How much do you agree or disagree with each of the following statements
Base: Cyclists n=1180

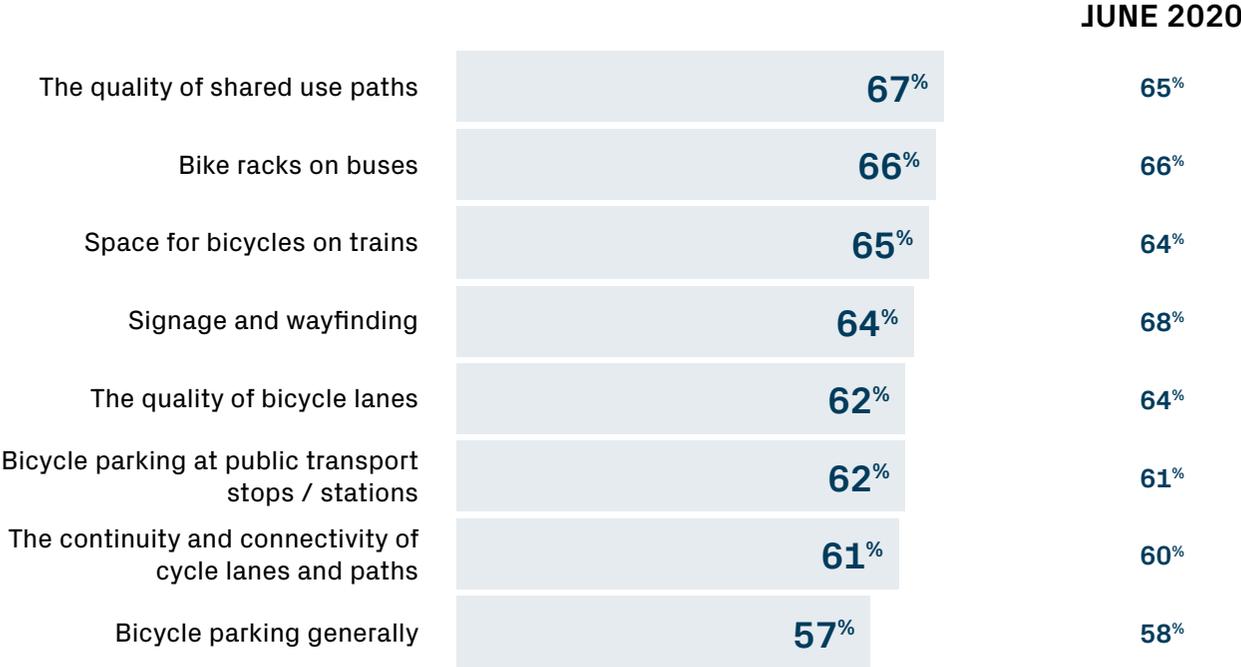
▲ Significantly higher than previous wave

▼ Significantly lower than previous wave



The majority of cyclists are satisfied with cycling infrastructure - and this maintains scores from 2020

CYCLIST SATISFACTION WITH CYCLING INFRASTRUCTURE – % SATISFIED (5-7) – JAN-DEC 2021



There were no significant changes in satisfaction with cycling infrastructure in 2021. Quality of shared use paths has the highest satisfaction.

There are still particular areas where infrastructure can be improved. Bicycle parking and connectivity /continuity of routes have the lowest satisfaction.

Leisure cyclists are least satisfied with bicycle parking (23%) and continuity and connectivity of cycle lanes and paths.

Q29b - Now please think about cycling infrastructure in [REGION].How satisfied are you with...?
 Base: Total Cyclist n=1180
 *don't know excluded from analysis

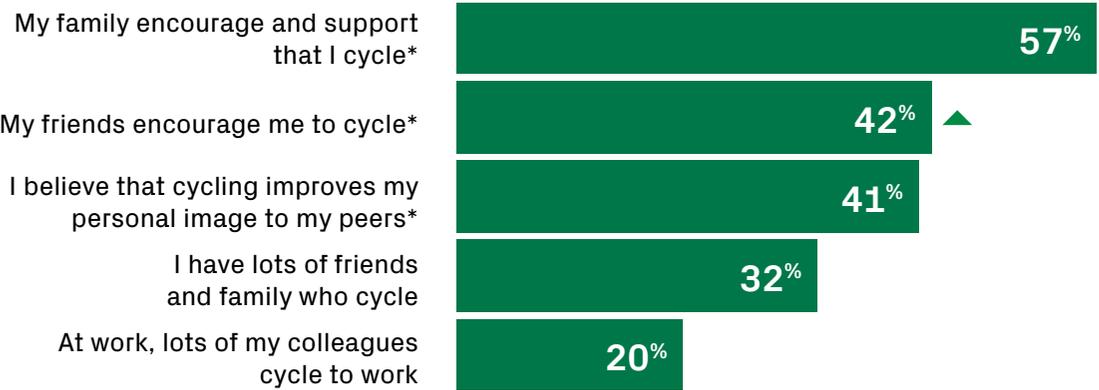
▲ Significantly higher than previous wave

▼ Significantly lower than previous wave



As well as infrastructure investment, social influences reinforce the normalisation of cycling

SOCIAL PERCEPTIONS - % STRONGLY AGREE / AGREE - JAN-DEC 2021



JUNE 2020

- 58%
- 38%
- 36%
- 33%
- 18%

Compared to 2020, in 2021 there has been a significant increase in people reporting that their friends encourage them to cycle. This is significantly higher than average among 35-44 year olds (54%).

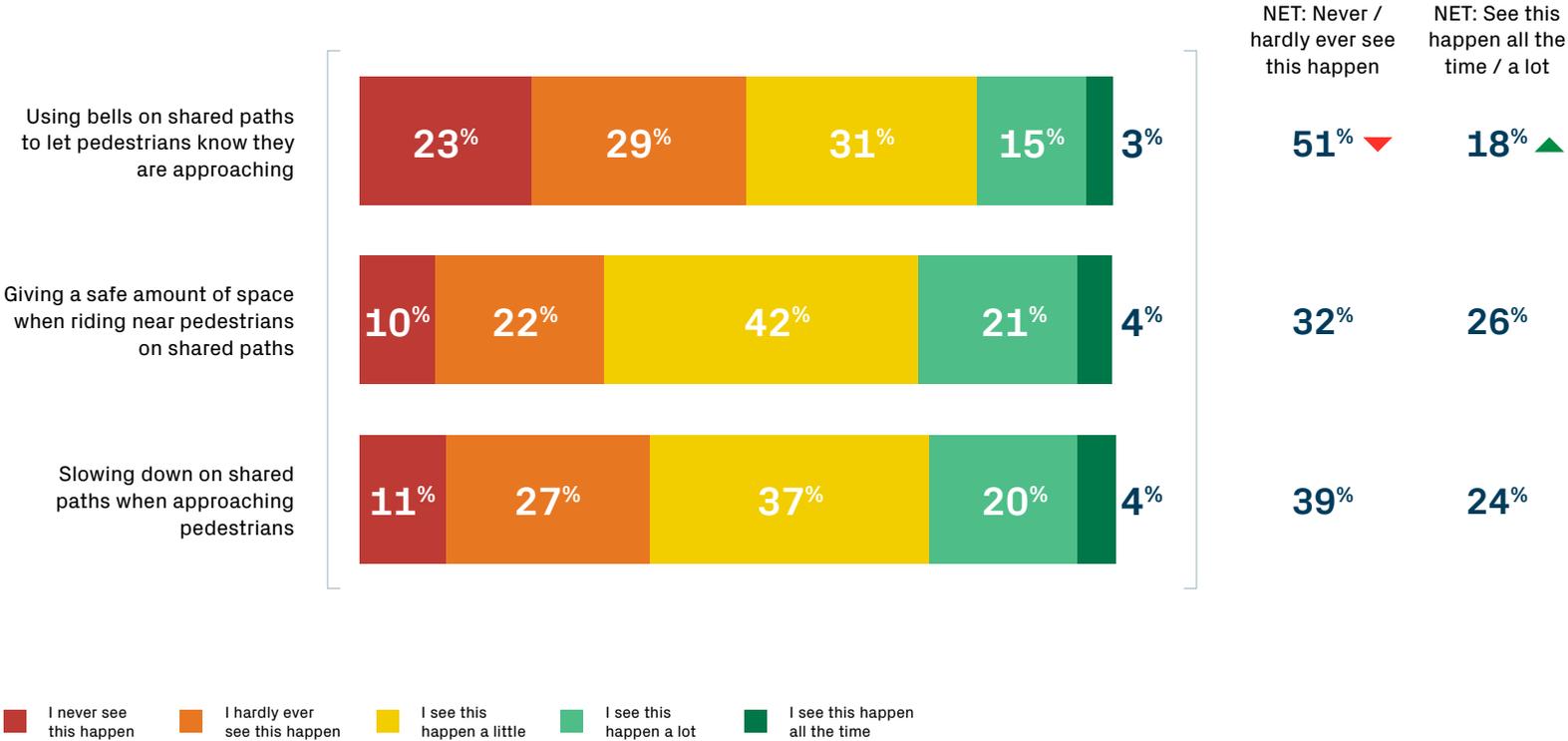
▲ Significantly higher than 2020 ▼ Significantly lower than 2020

Q8 - How much do you agree or disagree with each of the following statements?
 Base: 2021 Total Sample n=4924, 2020 Total sample n=2,256, *2021 Asked of cyclists n=1,180 * 2020 Asked of cyclists n=567.



There is an increased awareness of people using bells on shared paths

POSITIVE SHARED PATH BEHAVIOURS FROM CYCLISTS – JAN – DEC 2021

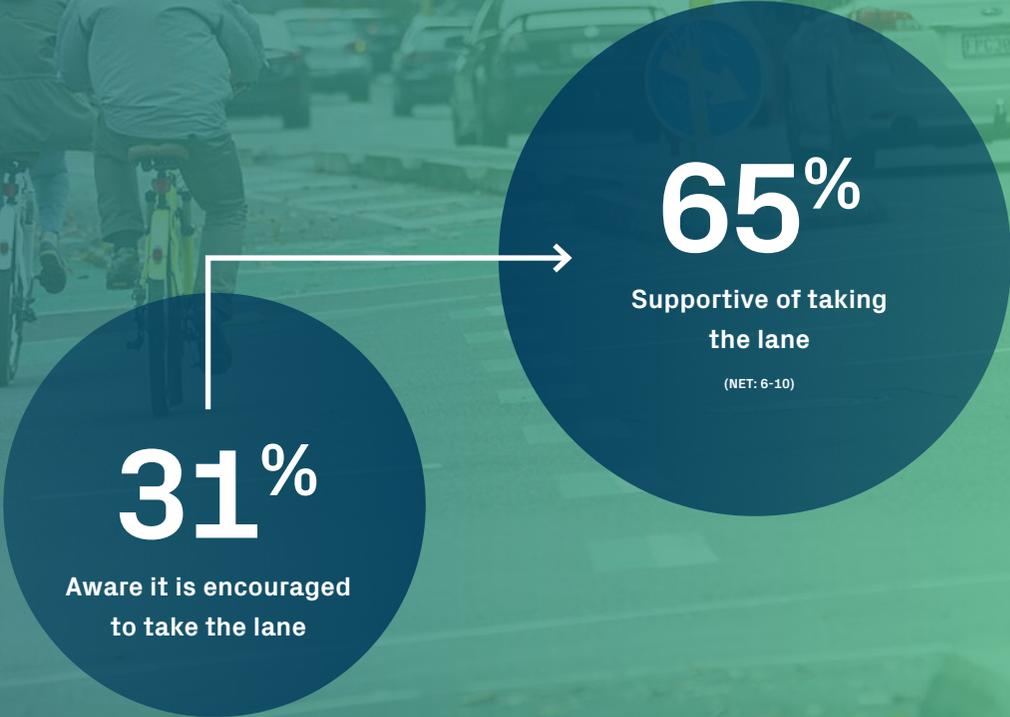


Q22 - How often do you see the following behaviour on the road, or shared path, from cyclists? I see this happen all the time + a lot Base: Total sample n=4,924

▲ Significantly higher than 2020

▼ Significantly lower than 2020

Only 1 in 3 people are aware that taking the lane is encouraged, but support for this behaviour is high

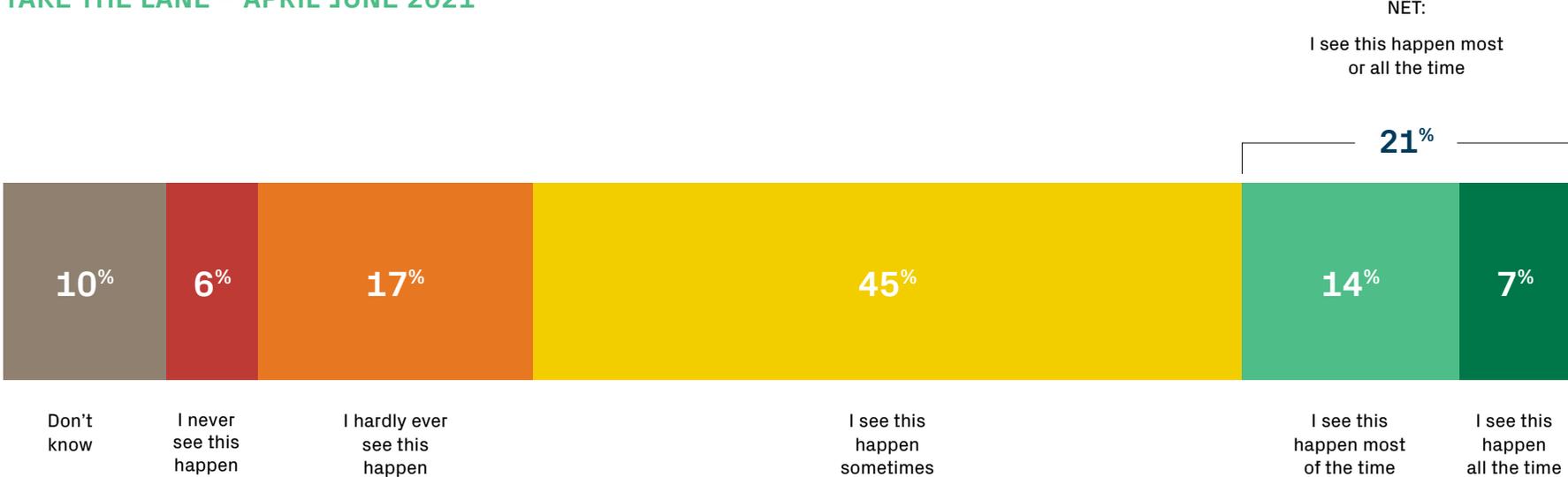


Question: Before today, were you aware that cyclists are encouraged to 'take the lane'?
Base: 2021 April – June (including DIP) n=2595



Two-thirds of people are seeing cyclists take the lane at least some of the time – for 1 in 5 this is most of the time

TAKE THE LANE – APRIL-JUNE 2021

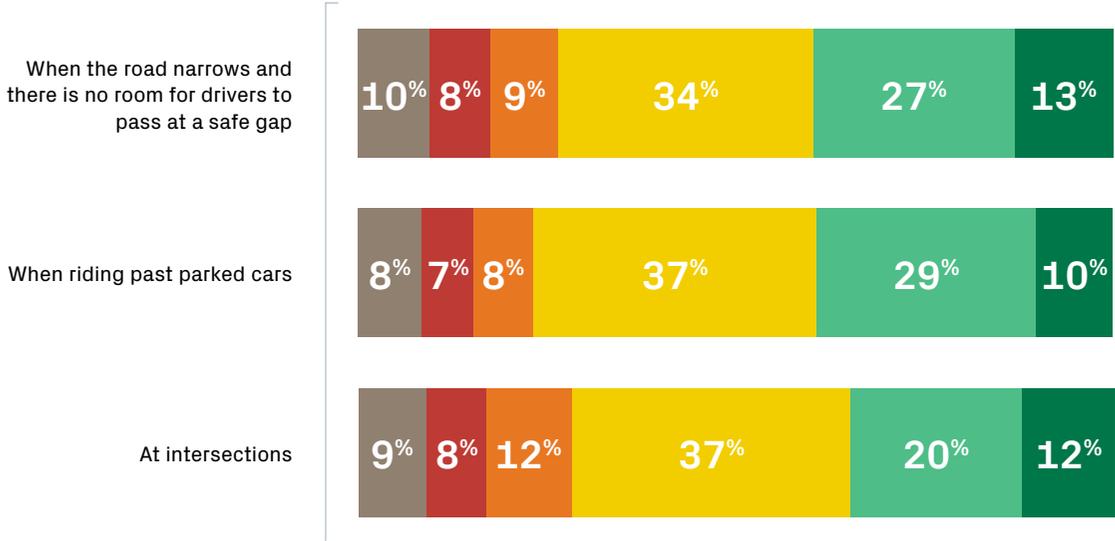


Question: How often do you see cyclists 'take the lane'?
Base: 2021 April - June (including DIP) n=2595

Around 4 in 10 cyclists report taking the lane when roads are narrow or when they're passing parked cars most or all of the time



CYCLISTS- HOW OFTEN THEY TAKE THE LANE



Taking the lane is slightly less common at intersections, but still over one-third of cyclists do this at least most of the time.

Overall taking the lane is seen as most important when riding alongside parked cars where doors could open [e.g. to avoid unexpectedly swerving] (74%).

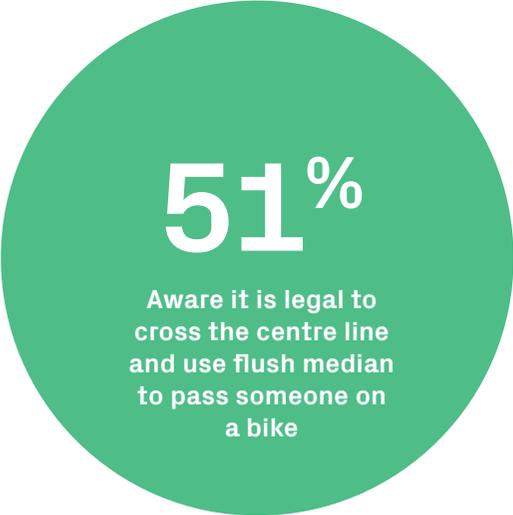
Don't know or N/A
 Never
 Hardly ever
 Sometimes
 Most of the time
 All of the time

Question: When cycling, how often do you 'take the lane' in each of the following situations...?
 Base: 2021 April - June (including DIP) Cyclists n=606



Half of people are aware that drivers can use the Flush Median to pass cyclists and around 6 in 10 say they're likely to do so

AWARENESS OF USE OF FLUSH MEDIAN TO PASS BIKES



LIKELIHOOD OF USING FLUSH MEDIAN TO PASS BIKES



■ Not at all likely
 ■ Not very likely
 ■ Not sure
 ■ Quite likely
 ■ Very likely

AWARE_FLUSH: Are you aware that when passing someone on a bike, and when it is safe to do so, it is legal to cross the centre line and use the flush median?
 USE_FLUSH: When driving and it is safe to do so, how likely is it that you would use the flush median to pass someone on a bike?
 Base: 2021 April – June (including DIP) n=2595

Let's talk

TRA