2023
Understanding attitudes and perceptions of cycling & walking

NZ Transport Agency
Waka Kotahi

TRA

BACKGROUND OF OUR RESEARCH PROGRAMME

This study monitors the attitudes and behaviours around walking and cycling of New Zealanders in six urban centres.

It looks at how often they travel by these active modes and for what purposes. It also delves in their motivations for walking and cycling 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 study 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 and cycling behaviour

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

2

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

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 and cycling attitudes, perceptions and behaviours.

A 15-minute online survey of n=3,170 New Zealanders in 2023

With a focus on key regions of:

- Auckland n=564
- Wellington n=513
- Christchurch n=569
- Hamilton n=505
- Tauranga n=507
- Dunedin n=512

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

- n=3,170 +/-1.8%
- n~500 is +/-4.4%
- n~200 is +/-6.9%

Fieldwork ran from Jan 12th 2023 – December 20th 2023

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=3,170 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

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	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

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.

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Summary: Key findings

Summary: Support for Walking

- There is high support for walking in the community amongst Urban New Zealanders.
- Most people also feel safe walking in their community (80%), and this is higher amongst those aged 65 years and above.
- Just over 7 in 10 people agree that walking is a great way to get around town easily and efficiently. The perceived ease of using footpaths and crossing roads has improved significantly since 2022.

KEY SNAPSHOT METRICS :

90%	Of Urban New Zealanders are supportive of walking in their community
80%	Of Urban New Zealanders feel safe walking in their community.
71%	Of Urban New Zealanders feel walking is a great way to get around town easily and efficiently.

Summary: Support for Cycling

SUPPORT FOR CYCLING

- Urban New Zealanders are highly supportive of cycling in the community and over half think it's a great to get around. This support and sentiment remains strong even through seasonal changes.
- Over half of Urban New Zealanders are supportive of investment in infrastructure. These people support investment in infrastructure because it gives people more travel options and gets people outside exercising. Three-fifths of cyclists also indicate that the opening of cycle ways/paths has encouraged them to cycle more.
- Half of cyclists feel safe cycling in their region, and this remains above pre-covid levels. Those who cycle more frequently feel more safe cycling.
- Cyclists feel encouraged to cycle by their communities. In particular, family support for cycling has increased to 60% - a 6 point increase compared to 2022.

SUPPORT OF INFRASTRUCTURE INVESTMENT:

61% +4% ▲
Agree that investing in cycle lanes is important because it gives people more travel options

56%
Agree that investing in cycle lanes is important because it gets people outside exercising.

60% +7% ▲
Agree the opening of cycle ways/paths has encouraged me to cycle more (CYCLISTS ONLY)

KEY SNAPSHOT METRICS :

69% Of Urban New Zealanders are supportive of cycling in their community

60% +6% △ Of cyclists feel encouraged to cycle by their family. An increase of 6% from 2022.

53% Of Urban New Zealanders feel safe cycling in their community.

53% Of Urban New Zealanders agree that cycling is a great way to get around town easily and efficiently.

▲ Significantly higher than 2022 ▼ Significantly lower than 2022

Summary: Motivators and barriers for walking and cycling

MOTIVATORS AND BARRIERS FOR WALKING

- Personal factors around fitness, enjoyment and 'me time' remain the main walking motivators.
- After declines last year, 'better walking routes' has increased as a walking motivator.
- Perceived safety when walking in the dark remains the largest barrier to walking.
- Aside from safety, walking distance, time, practicality and weather are key barriers to walking.
- Walking barriers around safety, distance, time and practicality are lowest amongst those living in Wellington.

MOTIVATORS AND BARRIERS FOR CYCLING

- The top cycling motivator is keeping fit (68%) – a 7 point increase compared to 2022. Enjoyment and cost savings are also key cycling motivators.
- Increased infrastructure over time is helping to motivate cyclists to continue to cycle.
- Safety remains a key barrier for cycling. Public roads without cycle lanes, motor vehicles on the road, and cycling in the dark are key safety concerns for cyclists.
- Access to a bike also remains a barrier for 1 in 3 New Zealanders. Of those that can ride a bike, only 47% own or have access to a bike.

Summary: Walking and cycling behaviours

- Active modes remain an important transport option for Urban New Zealanders, with most (68%) using active modes (walking, bicycle, e-bike or e-scooter) at least once a week.
- A quarter of New Zealanders (25%) walk as a way of getting places most days, while over a third (37%) walk as a way of getting places between once and a few times a week.
- Currently, 1 in 10 New Zealanders are cycling as a way of getting to and from work / study and around town at least once a week.
- The use of active modes remains above pre-covid levels, driven by higher rates of walking compared to 2018 and 2019.
- The proportion of weekly trips travelled using active modes increased to 39% in the past year (34% in 2022), driven by an increase in walking, which now accounts for over a third of weekly trips.
- The ability to ride a bike remains high with 77% of Urban New Zealanders able to ride a bike.

KEY SNAPSHOT METRICS :

68% Of Urban New Zealanders use active modes at least once a week

62% Of Urban New Zealanders are walking as a way of getting places at least once a week (25% most days, 37% once to a few times a week)

10% Of Urban New Zealanders are cycling as a way of getting places at least once a week

39% +5% ▲ Of weekly trips are travelled using active modes. Up 4% on 2022.

▲ Significantly higher than 2022 ▼ Significantly lower than 2022

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Contents

1

The context for walking and cycling

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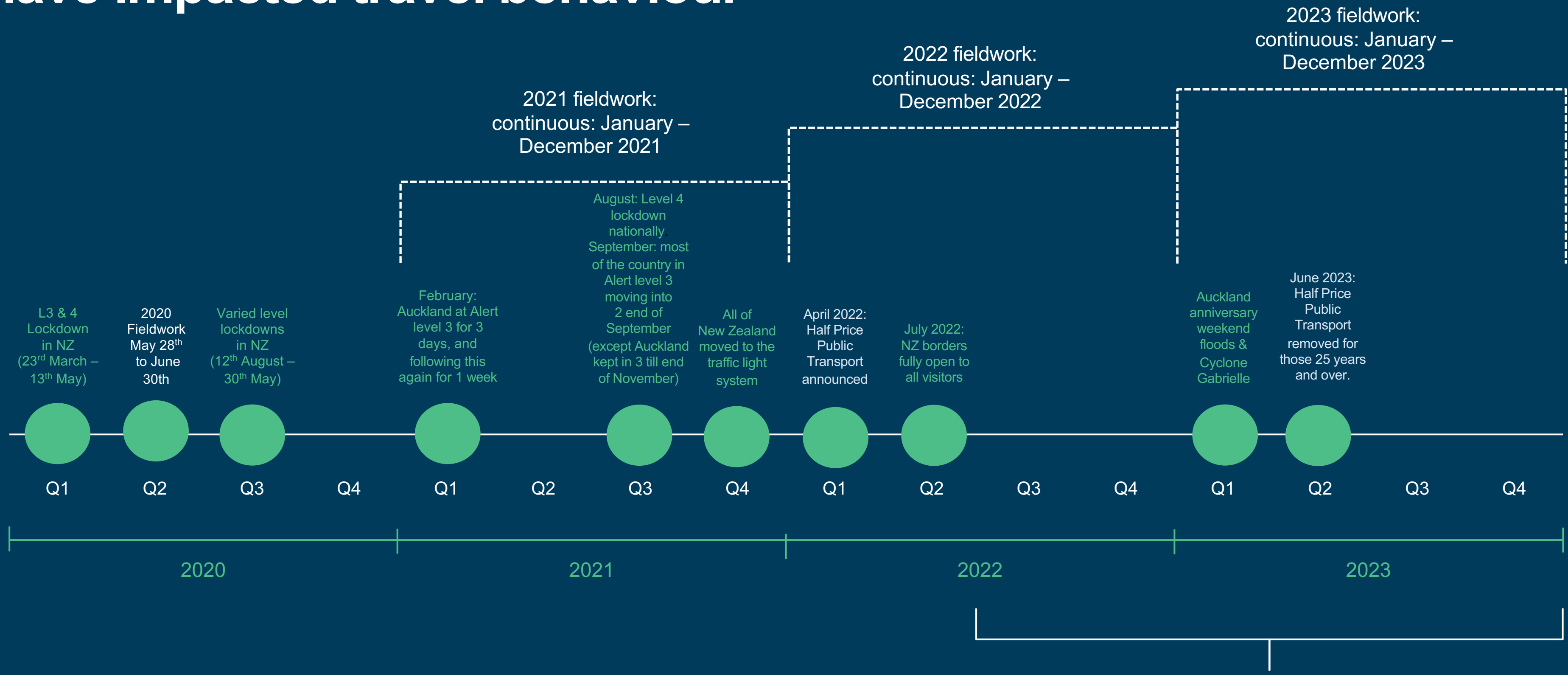
Summary: The context for walking and cycling

- Transport behaviour was greatly impacted by the Covid-19 pandemic. While 2023 represents the first full year post Covid-19 without restrictions, there has been a lasting impact on the way people work and travel.
- Covid-19 changed perceptions and behaviour on working from home. After Covid-19 restrictions eased, 1 in 5 New Zealanders were mainly or completely working from home, double the pre-Covid level.
- From July 2023, half price fares on public transport were removed for those aged 25 years and above. Prior research has shown that the half price public transport initiative that ran between April 2022 – June 2023 had resulted in 7% of New Zealanders switching or taking new public transport trip, with 3% from trips previously taken by using active modes.

Source: https://www.nzta.govt.nz/resources/covid-19-impacts-on-transport/, https://www.nzta.govt.nz/resources/research/notes/009a/

Over the last three years a number of societal events have impacted travel behaviour



We also know that post the Covid-19 pandemic, the 'working from home' and flexible working lifestyle became more accepted and prevalent in New Zealand meaning that people were commuting to and from work less frequently.

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The Covid-19 lockdowns changed perceptions of working from home, with close to two-thirds wanting to work from home

Two-thirds (67%) feel they are able to work from home productively.

REMOTE WORKING PERCEPTION DURING COVID-19
MAY 2020

63%
Of people have a desire to work from home

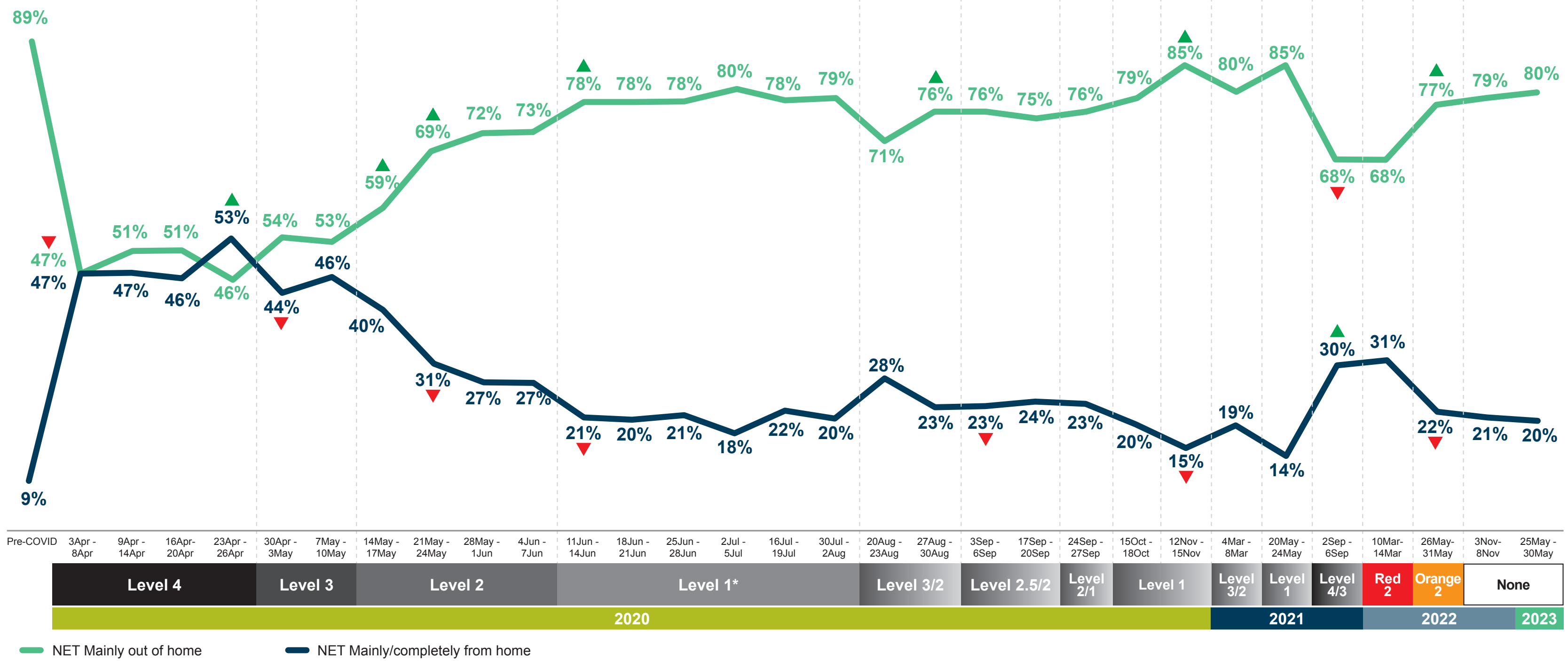
67%
Of people feel they have ability to work from home productively

Source: Working from home deep dive - https://www.nzta.govt.nz/assets/resources/covid-19-impacts-on-transport/waka-kotahi-nzta-covid-19-tracking-working-from-home-deep-dive-wave-30-20230628.pdf

Alongside changing perceptions, Covid-19 lockdowns forced more people to work from home, with 1 in 5 continuing to work mainly/completely from home post Covid-19

The proportion of people working from home post-Covid is double the pre-Covid rate

PROPORTION OF PEOPLE WORKING IN AND OUT OF HOME – COVID-10 TRANSPORT IMPACT REPORT



During Covid-19 lockdowns, the proportion of people working mainly/completely from home grew to nearly 1 in 2 workers during the level 4 lockdown in 2020.

Source: NZ Transport Agency Covid-19 transport impact report
https://www.nzta.govt.nz/assets/resources/covid-19-impacts-on-transport/waka-kotahi-nzta-covid-19-tracking-working-from-home-deep-dive-wave-30-20230628.pdf

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

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Overall travel behaviour

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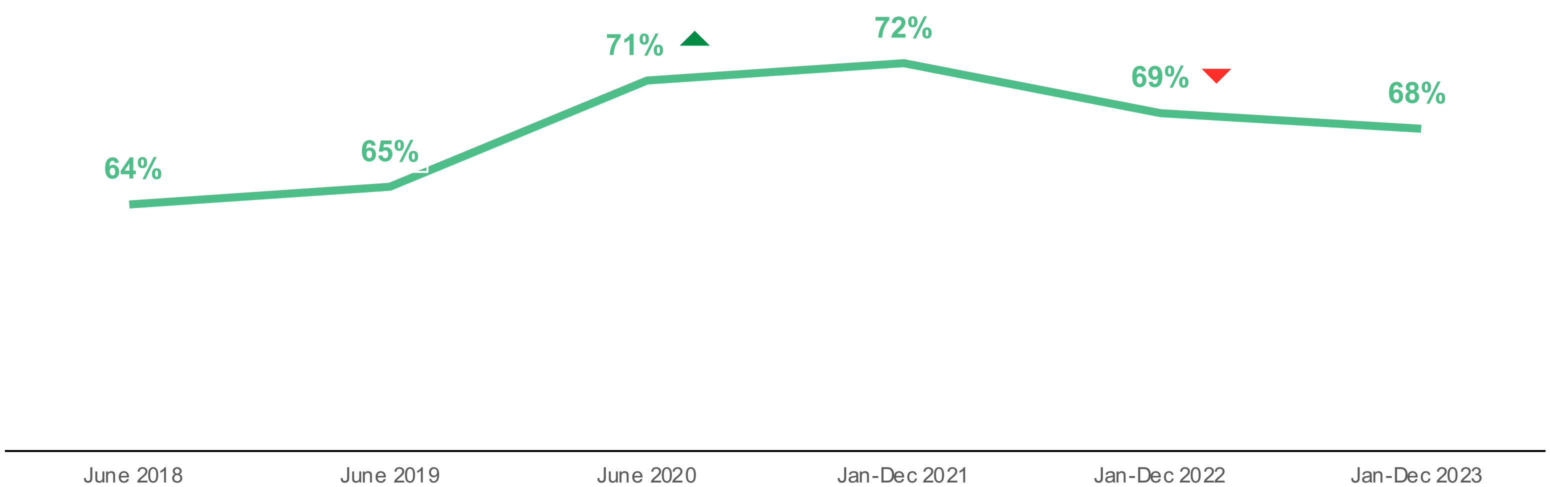
Summary: Overall travel behaviour

- Active modes remain an important transport option for Urban New Zealanders, with most (68%) using active modes (walking, bicycle, e-bike or e-scooter) at least once a week.
- The use of active modes remains above pre-covid levels, driven by higher rates of walking compared to 2018 and 2019.
- The proportion of people walking at least once a week is greatest in Dunedin, while cycling at least once a week is greatest in Christchurch.
- The proportion of weekly trips travelled using active modes increased to 39% in the past year (34% in 2022), driven by an increase in walking, which now accounts for over a third of weekly trips.

The number of people engaging in active modes at least once per week remains above pre-covid levels

Close to 7 in 10 people engage in active modes at least once per week

USE OF ACTIVE MODES OVER TIME (AT LEAST ONCE PER WEEK)
2018 – 2023 YEARLY TRENDS



Active modes
- Walking
- Cycling
- E-bike
- E-scooter

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
Walking defined as 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 2021 onwards*

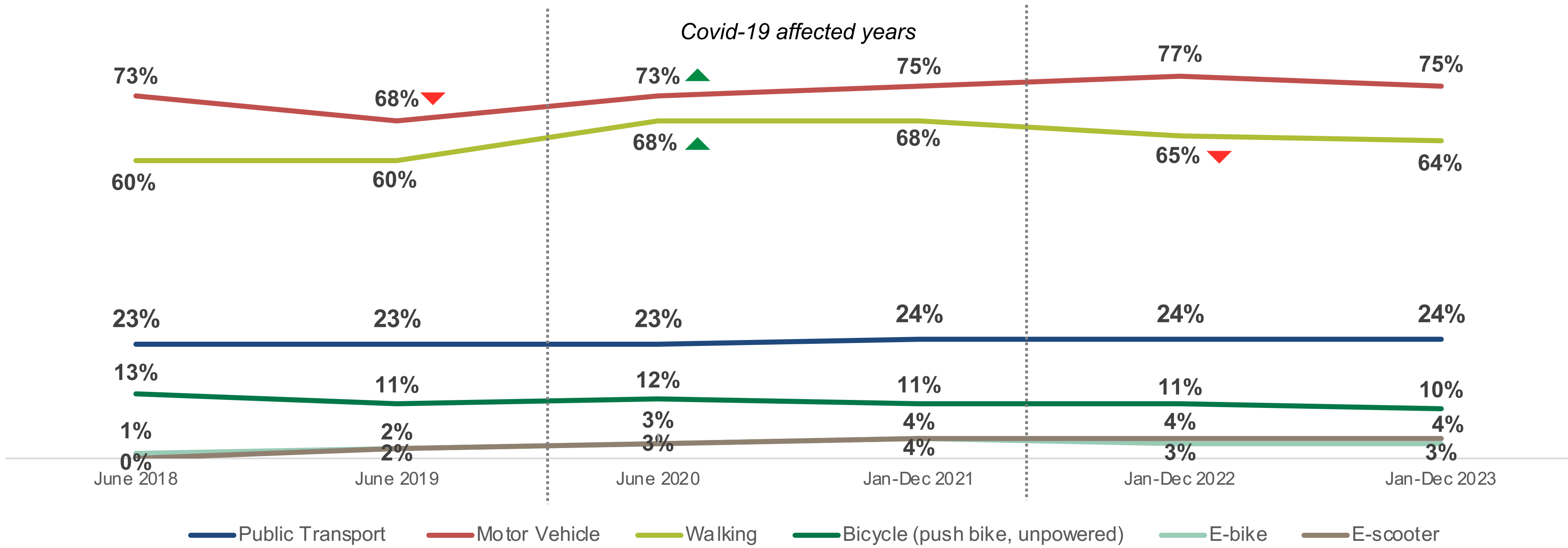
▲ Significantly higher than previous period
▼ Significantly lower than previous period

Walking is the most common active mode with close to 2 in 3 people walking at least once a week

Most Urban New Zealanders continue to use motor vehicles at least once a week (75%).

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

2018 – 2023 YEARLY TRENDS



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NET: Active modes (Walking, bicycle, electric bike, electric scooter)
Walking defined as 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

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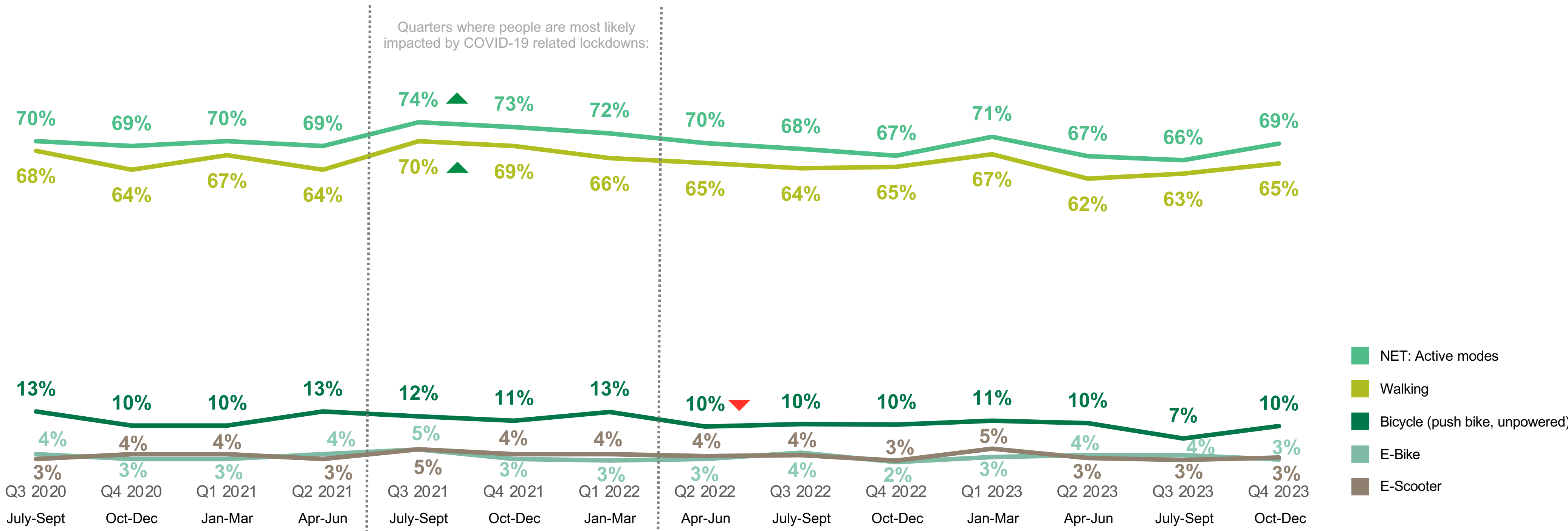
Usage of the various active modes remain relatively stable across quarters and the seasonal weather changes

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

2020 – 2023 QUARTERLY TRENDS



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*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

Modes of transportation vary by region, with higher rates of cycling in Christchurch and walking in Dunedin and Wellington

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

JAN-DEC 23

	Total Jan-Dec' 23	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
NET: Motorised vehicle	**79%**	80%	78%	85%▲	75%▼	81%	82%
Walking*	**64%**	57%▼	62%	65%	70%▲	66%	69%▲
Bicycle (push bike, unpowered)	**10%**	11%	11%	9%	4%▼	14%▲	7%▼
E-bike	**3%**	4%	4%	7%▲	3%	3%	3%
E-scooter	**4%**	5%	5%	2%	3%	3%	3%
NET: Public transport	**24%**	34%▲	16%▼	7%▼	36%▲	17%▼	18%▼

Those living in Auckland are less likely to walk at least once a week than people living in other urban centres.

Regular electric bike usage (at least once per week) is highest in Tauranga.

Q24. On average, how often do you use each of the following modes of transport, for any reason Base: Total sample, continuous 2023 n=3170, Auckland n=564, Hamilton n=505, Tauranga n=507, Wellington n=513, Christchurch n=569, Dunedin n=512
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 (Bicycle, Electric bike) NET: Public Transport (Bus, Train, Ferry)

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

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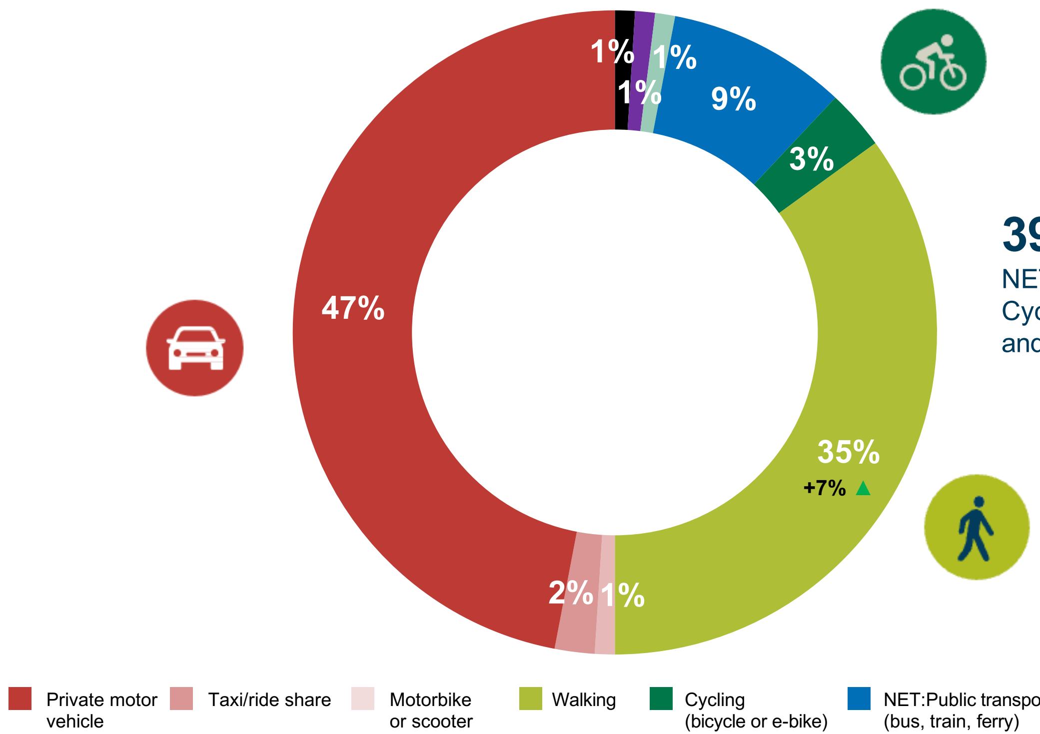
Cycling and walking account for over a third of weekly trips travelled, increasing significantly since last year

SHARE OF TOTAL WEEKLY TRIPS TRAVELLED BY EACH MODE
JAN-DEC 23



39% +5% ▲
NET: Walking, Cycling (incl e-bike) and Wheeling

The proportion of trips being walking in the past week has significantly increased in the past year – driving the overall uplift in active modes.

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, 2022 n=3278, 2023 n = 3170
Walking defined as walking 100m or crossing the road
Changes to question structure and wording

▲ Significantly higher than 2022
▼ Significantly lower than 2022

The type of trip people take influences the mode of transport they use

Cycling makes up a greater proportion of trips to and from a place of recreation compared to other trip types.

MODE TRAVELLED BY TYPES OF TRIP IN THE LAST WEEK
JAN-DEC 23

	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
Car	47%	48%	34% ▼	49%	48%	50%	45%	38% ▼	63% ▲	48%
Cycling	3%	3%	3%	3%	2% ▼	2%	4% ▲	3%	2%	1% ▼
Walking	35%	33%	32%	33%	38%	33%	37%	42%	22% ▼	31%
Train	2%	3% ▲	3%	1% ▼	1% ▼	1%	2%	2%	1% ▼	3%
Bus	6%	8%	14% ▲	6%	5%	5% ▼	5% ▼	6%	5%	8%
E-scooter	1%	1%	4%	1%	1% ▼	2%	2%	1%	1%	1%

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

▲ Significantly higher than other trip types
▼ Significantly lower than other trip types

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3

A closer look at walking

Summary: A closer look at walking

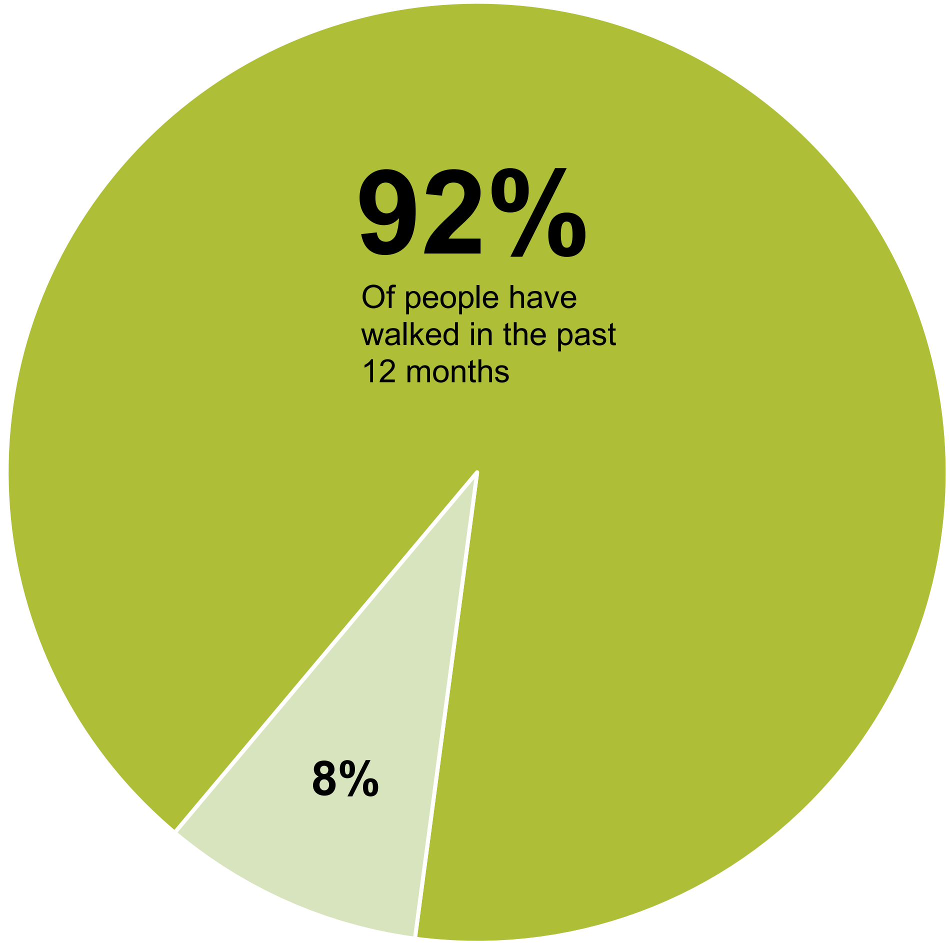
- A large majority of New Zealanders (92%) have walked* in the last 12 months, with half of this group walking on four or more days per week on average.
- A quarter of New Zealanders (25%) walk as a way of getting places most days, while over a third (37%) walk as a way of getting places every few days or once or twice a week.
- Levels of walking are high across all regions with Wellington having the highest rates of people walking as a way of getting places (e.g. to and from work and around town).

*walking 100m or crossing the road

The majority of Urban New Zealanders have walked in the past 12 months

PROPORTION OF PEOPLE WALKING IN THE PAST 12 MONTHS

APR-DEC 23



Only 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 Apr-Dec 2023 n=2383
*Change in methodology to prompt those who said they did not walk and ask them again. This does not allow comparison across time. The change was made in April 2023 so the data only includes Apr-Dec'23.

The frequency that Urban New Zealanders walk remains high, with half of those who have walked in the past 12 months (49%) walking most days

WALKING FREQUENCY – BASED ON THOSE WHO WALKED* IN THE LAST 12 MONTHS

JAN-DEC 23

Change in question wording

Covid-19 affected years (2020, 2021)

	2018	2019	2020	2021	2022	2023
Most days (4 or more days per week)	46%	45%	50% ▲	51%	49%	49%
Every few days (3 days per week)	19%	19%	22% ▲	22%	20%	22%
Once or twice a week (1-2 days per week)	18%	21%	18% ▼	18%	18%	17%
A few times a month	12%	11%	9% ▼	8%	10%	11%
Once or twice a year	4%	5%	1% ▼	1%	2%	1%

Q24: On average, how often do you use each of the following modes of transport, for any reason?
*Walk for at least 100m and/or cross the road.
Base Sample of Walkers in P12 months 2023 n= 2355, 2022 n= 2443, 2021 n= 3627, 2020 n= 1725, 2019 n= 1537, 2018 n=1533
*Note: there was a slight change of questionnaire wording in 2020 from 'not very often at all', and 'not at all', to 'once or twice a year' and 'less than once a year'

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

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

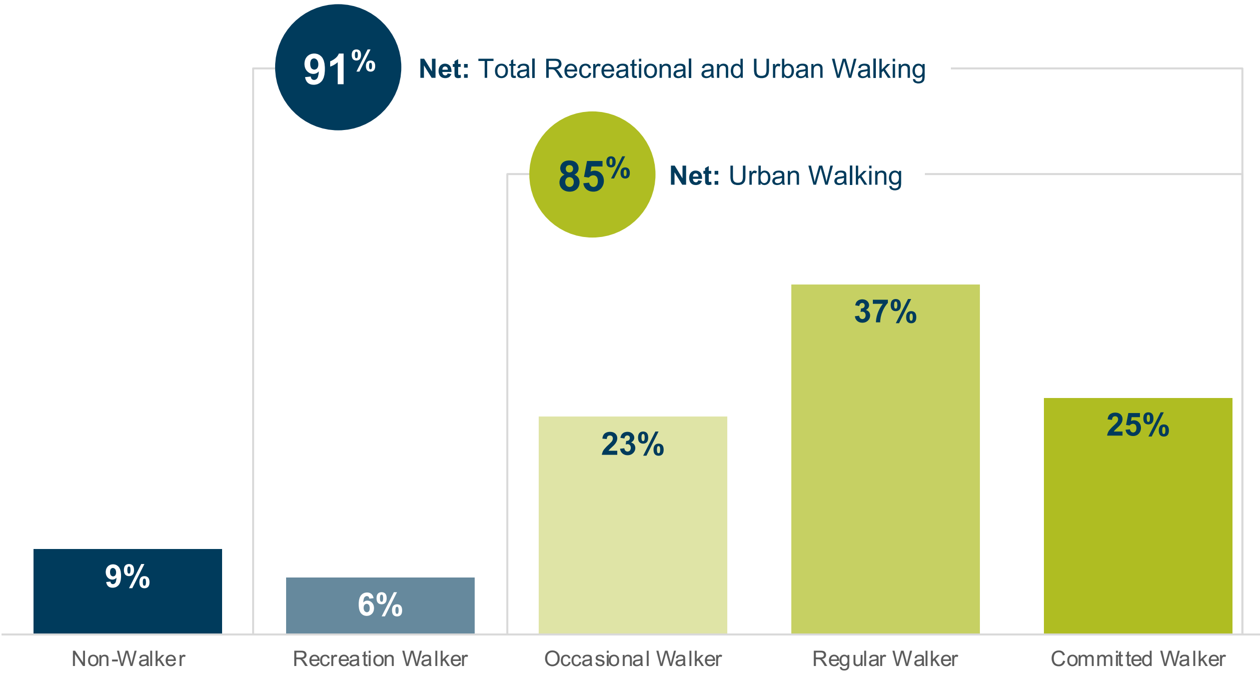
Those who walk as a way of getting places e.g., to and from work / study or around town.

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

Most New Zealanders are walking as a way to get around town and commute to and from work or study

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

APR-DEC 23



85% 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 2023 n= 2383
*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 so the data only includes Apr-Dec'23.

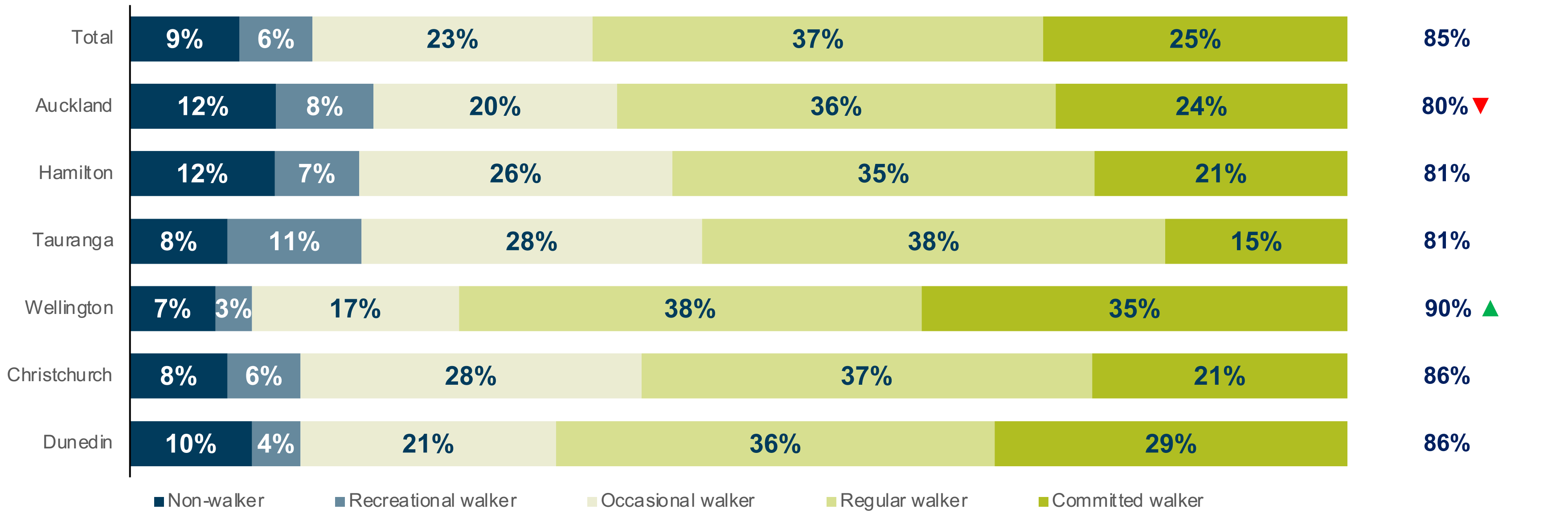
▲ Significantly higher than prior year
▼ Significantly lower than prior year

People living in Wellington are more likely to be Urban Walkers, with over 1 in 3 Committed Walkers who walk most days

Those living in Auckland are less likely to be Urban Walkers compared to other regions.

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

APR–DEC 23



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 2023 n =2383, Auckland n=428, Hamilton n=377, Tauranga n=378, Wellington n=388, Christchurch n=427, Dunedin n=385
*Walk for at least 100m and/or cross the road either on foot or by use of wheelchair or mobility aid.

▲ Significantly higher than other regions

▼ Significantly lower than other regions

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Support and opportunities for walking

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Summary: Support and opportunities for walking

- Nearly all Urban New Zealanders (90%) are supportive of walking in their community.
- Just over 7 in 10 people (71%) agree that walking is a great way to get around town easily and efficiently. Ease of using footpaths and crossing roads has also improved significantly.
- Most people feel safe walking in their region (80%), and this is higher amongst those aged 65 years and above.
- Personal factors around fitness, enjoyment and 'me time' remain the main walking motivators. After declines last year, 'better walking routes' has increased as a walking motivator.
- Perceptions of safety are lowest for walking at night in the dark and this remains the greatest barrier to walking. Aside from this, distance, time, practicality and weather are key barriers to walking.
- Walking barriers around safety, distance, time and practicality are lower amongst those living in Wellington.

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9 in 10 people are supportive of walking and a large majority see it as a great way to get around

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

90% (+3%) ▲

Are supportive of walking

2022 87%
2021 89%

PERCEPTIONS OF WALKING - % STRONGLY AGREE / AGREE

71% (+2%)

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

2022 69% ▼
2021 72%
2020 73%

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 2023 n= 3170, 2022 n= 3278 '2021 n=4942, 2020 n=2267
Q6d added in 2021, Question order changed in 2020.

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

Alongside perceptions of walking being an easy and efficient way to get around are strong perceptions that it is easy to use footpaths, cross roads and get places

Perceptions of the ease of using footpaths and crossing roads have significantly increased in the past year. Over 2 in 3 of people with kids under 15 find it easy to walk places with their kids.

EASE OF WALKING - % VERY EASY / SOMEWHAT EASY
JAN-DEC 23

	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)
%	80%	78%	73%	68%
+/- vs 2022	+3% ▲	+5% ▲	+1%	-1%

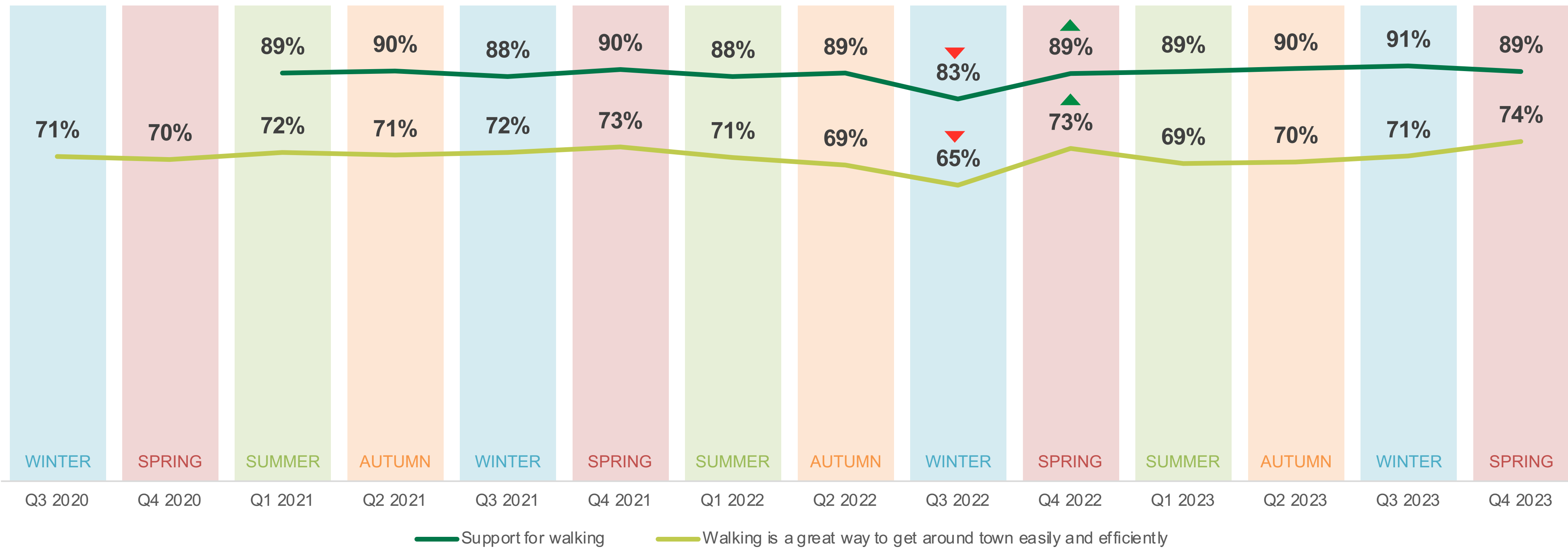
▲ Significantly higher than 2022
▼ Significantly lower than 2022

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 2023 n=3170, 2022 n=3278, Household with children under 15 n=664

TRA

Support and perceptions that walking is a great way to get around town remain high across all seasons

PERCEPTIONS AND SUPPORT OF WALKING
2020 – 2023 QUARTERLY TRENDS



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 2023 n= 3170, 2022 n= 3278 '2021 n=4942, 2020 n=2267
Q6d added in 2021, Question order changed in 2020.

▲ Significantly higher than previous wave ▼ Significantly lower than previous wave

Four-fifths of people feel safe walking in their region

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 less motorists on the road.

PERCEPTIONS OF SAFETY – % OF PEOPLE WHO FEEL SAFE WALKING (6-10)
JAN-DEC 23

80% (+1%)

Feel safe walking

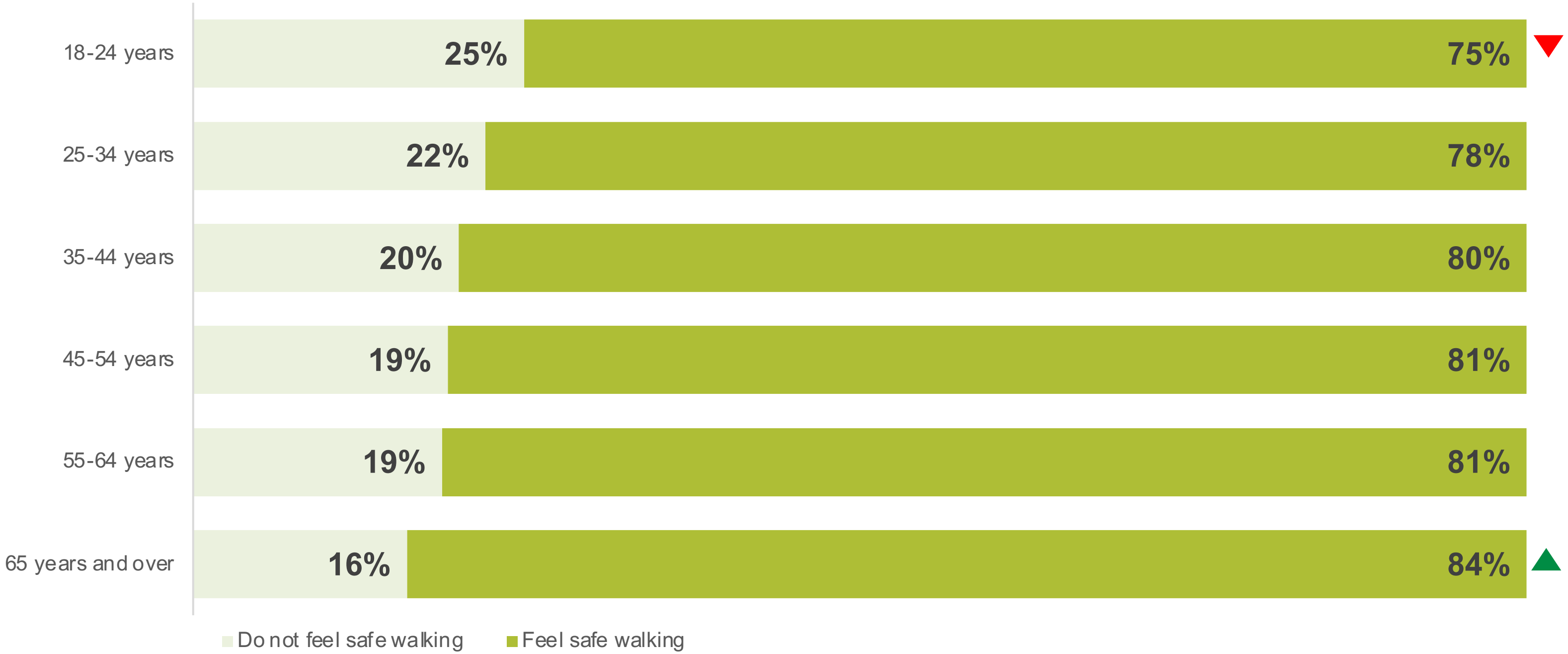
2022 79% ▼
2021 82%
2020 86%

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

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

Safety perceptions of walking are high across all age groups and are significantly higher amongst those aged 65+

PERCEPTIONS OF WALKING SAFETY – % OF PEOPLE WHO FEEL SAFE WALKING (6-10) BY AGE
JAN-DEC 23



Safety perceptions for walking are significantly lower for 18-24 year olds. This group are more likely to live in urban areas (e.g. city centres) and have lived in their current region for a shorter period of time than other age groups. It is likely that the greater proportion of 18-24 year olds living in urban compared to suburban areas could be contributing to the lower safety perceptions.

Q7A - In general, how safe are you/would you be walking in the [REGION] area?
Base Sample physically able to walk 2023 18-24 n=341, 25-34 n=573, 35-44 n=527, 45-54 n=460, 55-64 n=361, 65+ n=505

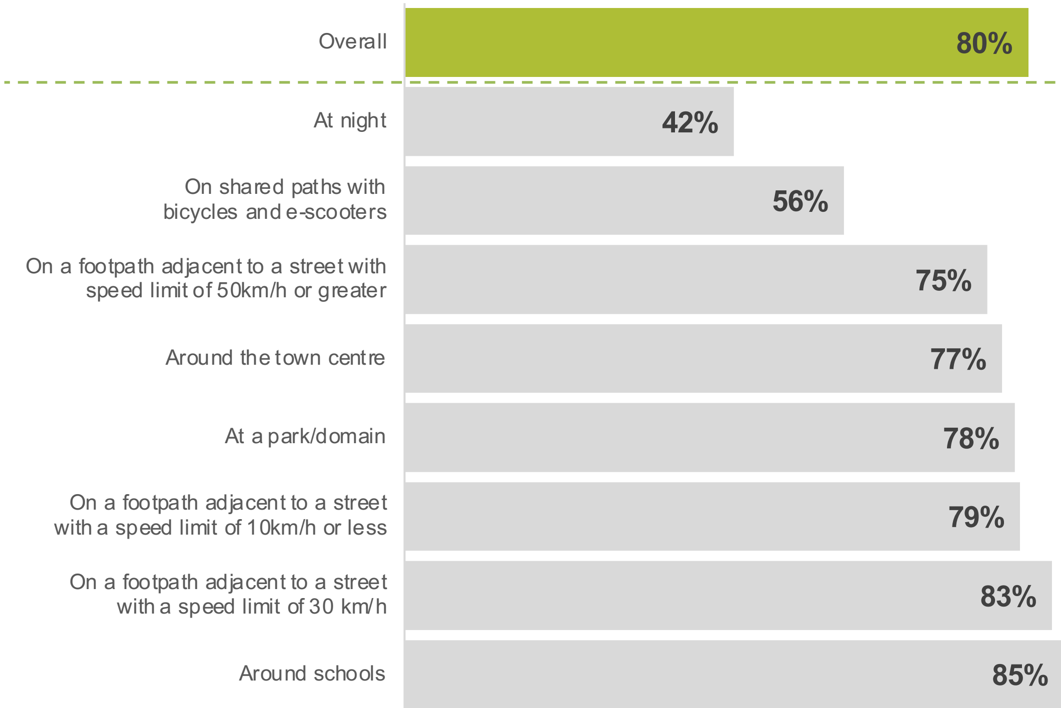
▲ Significantly higher than other age groups
▼ Significantly lower than other age groups

TRA

Feelings of safety are highest around schools and on streets with low speed areas

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

JAN-DEC 23



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

Walking at night remains the activity seen as the most unsafe when it comes to walking.

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

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

TRA

Safety of walking in the dark remains the largest barrier preventing people from walking

People also face barriers around ease and access, as well as logistics.

TOP SIX BARRIERS TO WALKING
JAN-DEC 23

SAFETY

35% (+2%)
I don't feel safe walking in the dark

EASE AND ACCESS

31% (+1%)
Walking is not a quick way for me to get where I need to go

29% (+2%)
I live too far away for it to be practical

27% (+2%)
Walking adds too much time to my journey

LOGISTICS

31% (+3%)
I always have too much to carry

27% (+2%)
It's not enjoyable because of the weather

We know that through 2023 there were multiple large weather-related events across the whole country, which may have affected walking perceptions.

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 sample physically able to walk, 2023 n=2767, 2022 n=2750, 2021 n=4,141

Safety is a greater barrier to walking amongst females and those living in Auckland or Hamilton

Walking barriers around safety, practicality and time are lower amongst those living in Wellington and those aged 55 years and above.

TOP SIX BARRIERS TO WALKING ACROSS DEMOGRAPHICS

JAN-DEC 23

	Total	18-34	35-54	55+	Male	Female	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
I don't feel safe walking in the dark	**35%**	36%	34%	36%	23%▼	47%▲	41%▲	40%▲	37%	29%▼	35%	33%
I live too far away for it to be practical	**29%**	28%	33%▲	24%▼	28%	30%	31%	29%	30%	25%▼	30%	28%
Walking is not a quick way for me to get where I need to go	**31%**	32%	32%	28%▼	28%▼	33%▲	30%	29%	36%▲	29%	31%	31%
Walking adds too much time to my journey	**27%**	31%▲	28%	22%▼	26%	28%	28%	28%	30%	23%▼	30%	28%
It's not enjoyable because of the weather	27%	27%	28%	27%	26%	28%	31%	27%	19%▼	28%	26%	31%
I always have too much to carry	**31%**	33%	31%	27%▼	26%▼	35%▲	31%	34%	37%▲	27%▼	29%	32%

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 2023 n=2767, 18-34 n=914, 35-54 n=987, 55+ n=866, Male n=1279, Female n=1480, Auckland n=485, Hamilton n=44, Tauranga n=460, Wellington n=447, Christchurch n=499, Dunedin n=432

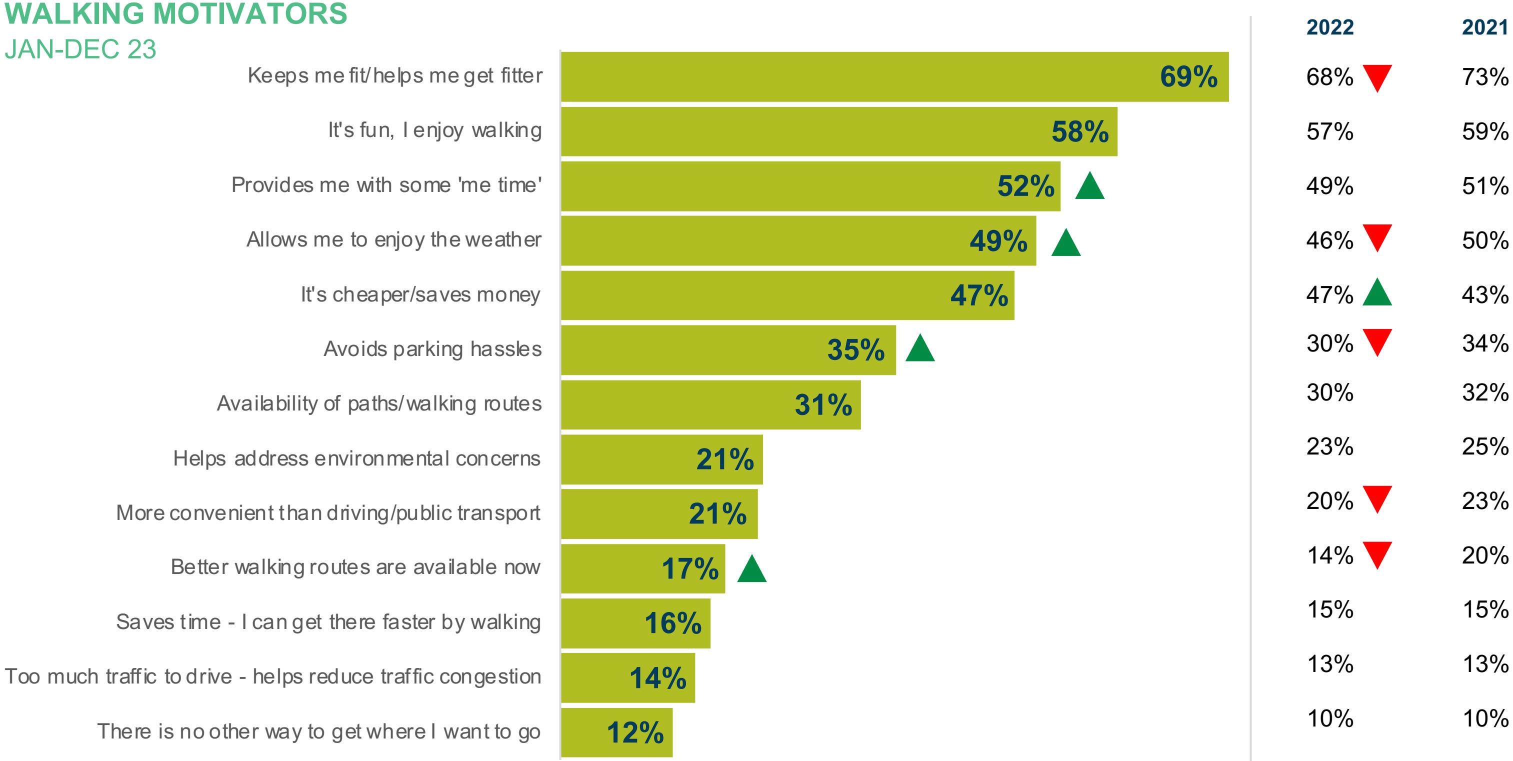
▲ Significantly higher than other age groups ▼ Significantly lower than other age groups

Personal factors around fitness, enjoyment and 'me time' remain the main motivators towards walking

12% of people walk because they have no other way to get to where they want to go.

WALKING MOTIVATORS

JAN-DEC 23



After declines in 2022, perceived availability of better walking routes is becoming a greater motivator towards walking.

This is consistent with improvements in the perceived ease of crossing the road and using footpaths (page 35).

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

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

TRA

Traits of weekly walkers; key perceptions, motivators and barriers

The biggest differences between people that walk at least once a week to those who do not are highlighted

Core perceptions of walking

Those that walk at least once a week are more likely than others to:

Be very supportive of walking in the region (+26%)

Agree that walking is a great way to get around (+17%)

Feel safe walking in their region (+10%)

Motivators of walking

Those that walk at least once a week are more likely than others to be motivated by:

Keeps me fit / helps me get fit (+22%)

It's fun, I enjoy walking (+22%)

Avoids parking hassles (+16%)

Reduced barriers to walking

Those that walk less than once a week are more likely than others to have these barriers:

I don't know how long walking will take (+17%)

I can't be bothered / too much effort (+10%)

Walking is not a quick way for me to get where I need to go (+8%)

5

A closer look at cycling

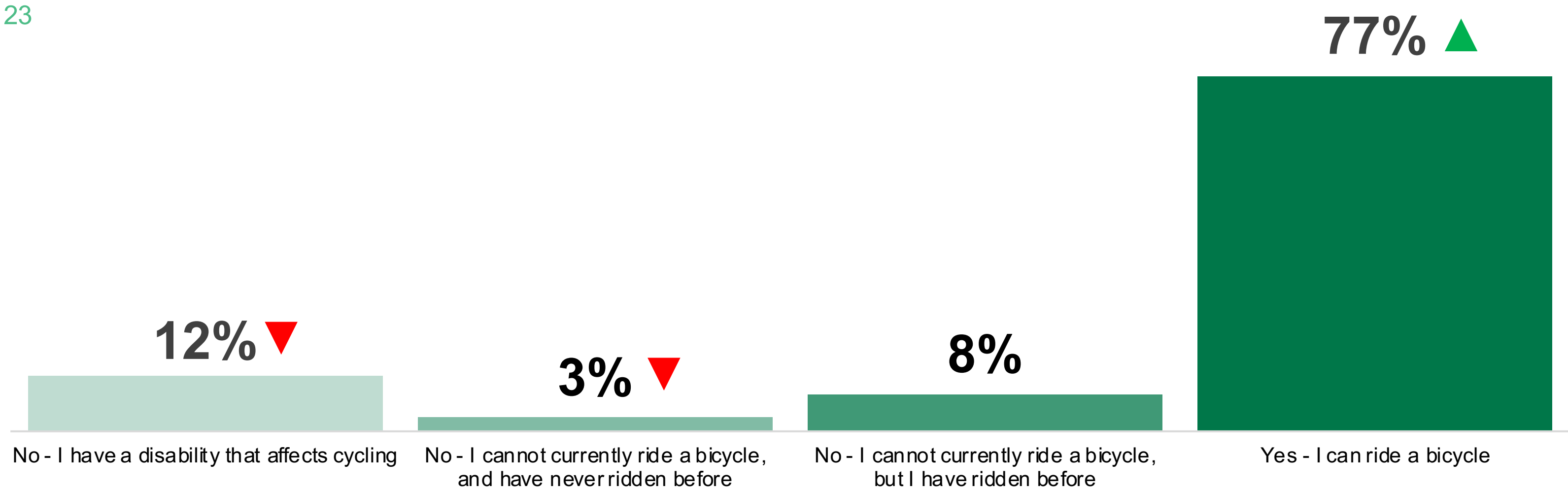
TRA

Summary: A closer look at cycling

- The ability to ride a bike remains high with 77% of Urban New Zealanders able to ride a bicycle.
- Of those that can ride a bike, 47% own or have access to a bike.
- Close to 1 in 5 (19%) New Zealanders cycle at least a few times a month. 16% of New Zealanders ride a push bike at least a few times a month and 5% ride an e-bike at least a few times a month.
- Currently, 1 in 10 New Zealanders cycle as way to getting to and from work / study and around town at least once a week.
- The majority of those not currently riding are supportive of cycling in their community.

Over three quarters of New Zealanders can ride a bike, and this has increased in 2023 back to similar levels seen in 2021

ABILITY TO RIDE A BICYCLE
JAN-DEC 23



2022	14% ▼	4% ▲	8%	74% ▼
2021	16%	3%	7%	78%

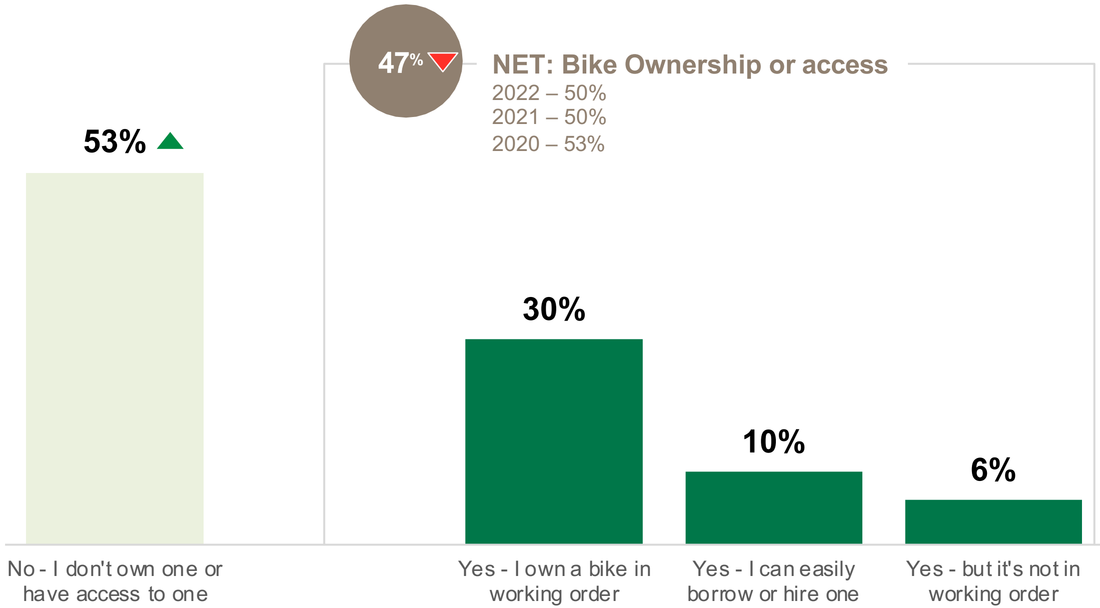
Q2X: Can you ride a bike?
Base Total Sample 2023 n= 3170, 2022 n=3278, 2021 n=4924

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

Access to a bike remains a challenge for half of New Zealanders, and this has grown slightly since 2022

BIKE OWNERSHIP/ACCESS

JAN-DEC 23



	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
2022	50%	32%	10%	8%
2021	50%	32%	11%	6%

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

- 18-34
- 35-54
- Males
- Tauranga
- Christchurch
- $100k or more income
- Māori
- Families

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

- Over 55
- Female
- Auckland
- Wellington
- Pasifika
- Less than $50k income
- Single or double income with no kids (SINKS/DINKS)
- Older households

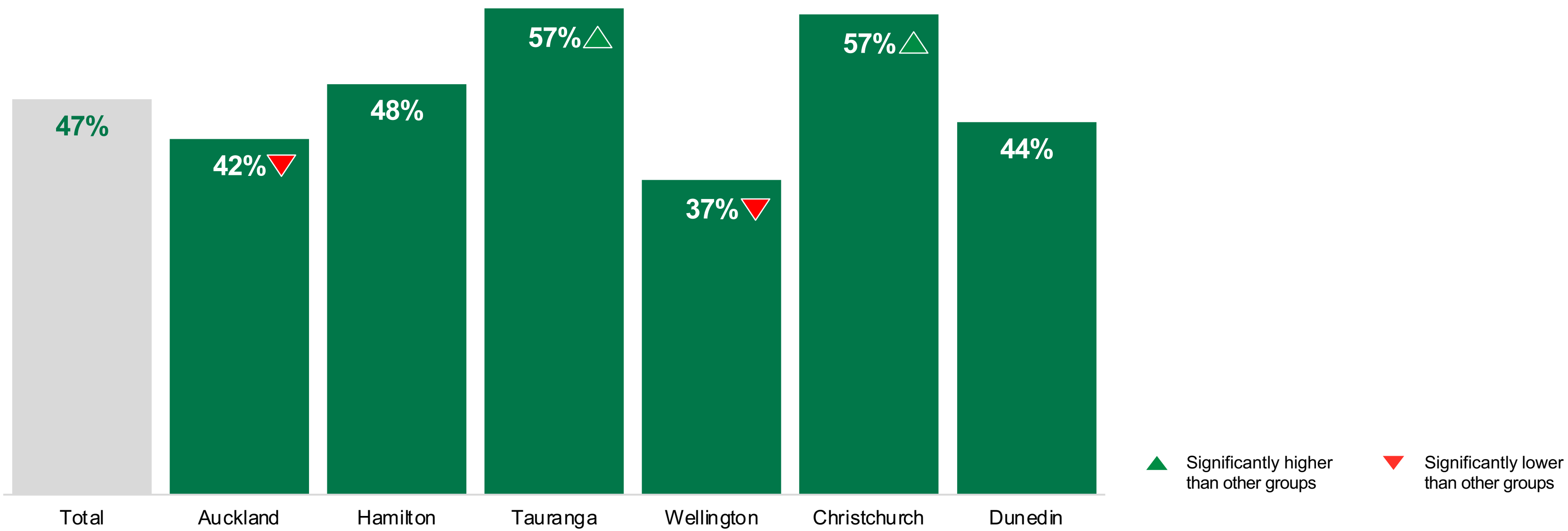
Q2: Do you own or have access to a bicycle you could easily use
Base ability to ride a bike and knows how 2023 n= 2780, 2022 n=2722, 2021 n-4194
*those who cannot cycle due to a disability are removed from the analysis

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

TRA

A greater proportion of people living in Tauranga and Christchurch have access to a bike

BIKE OWNERSHIP/ACCESS BY REGION
JAN-DEC 23



Q2: Do you own or have access to a bicycle you could easily use?
Base Physically able to ride a bike and knows how 2023 Auckland n=500, Hamilton n=441, Tauranga n=452, Wellington n=443, Christchurch n=501, Dunedin n=443
*those who cannot cycle due to a disability are removed from the analysis

19% of Urban New Zealanders cycle at least a few times a month

16% ride a push bike and 5% ride an e-bike at least a few times a month.

PROPORTION OF PEOPLE CYCLING AT LEAST A FEW TIMES A MONTH

JAN-DEC 23

19%

Q24: On average, how often do you use each of the following modes of transport, for any reason?
Base: 2023 n=3170

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

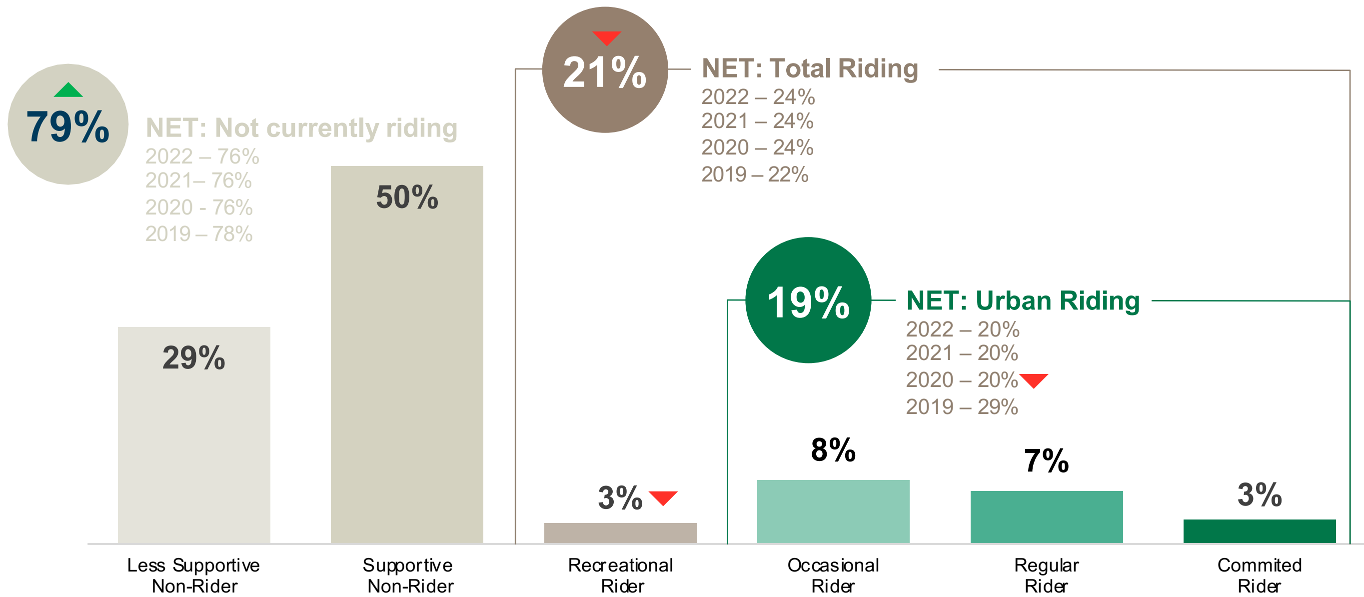
Use a bike to commute to and from work / study or to get around town most days.

Urban Riders

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

The proportion of Urban Riders, those cycling as a way of getting places, has remained stable since 2020

CYCLING SEGMENTATION FRAMEWORK – % BASED ON CYCLING* IN THE LAST 12 MONTHS
JAN-DEC 23



2022	28%	48%	4%	9%	7%	3%
2021	28%	48%	4%	8%	8%	3%
2020	26%	50%	5%	10%	6%	3%
2019	Change in response options				6%	3%

19% of New Zealanders are Urban Riders who cycle as a way to get to and from work / study or around town – and this remains stable over time

Half of New Zealanders are Supportive Non-Riders, demonstrating that there is high support for cycling amongst those who do not currently cycle.

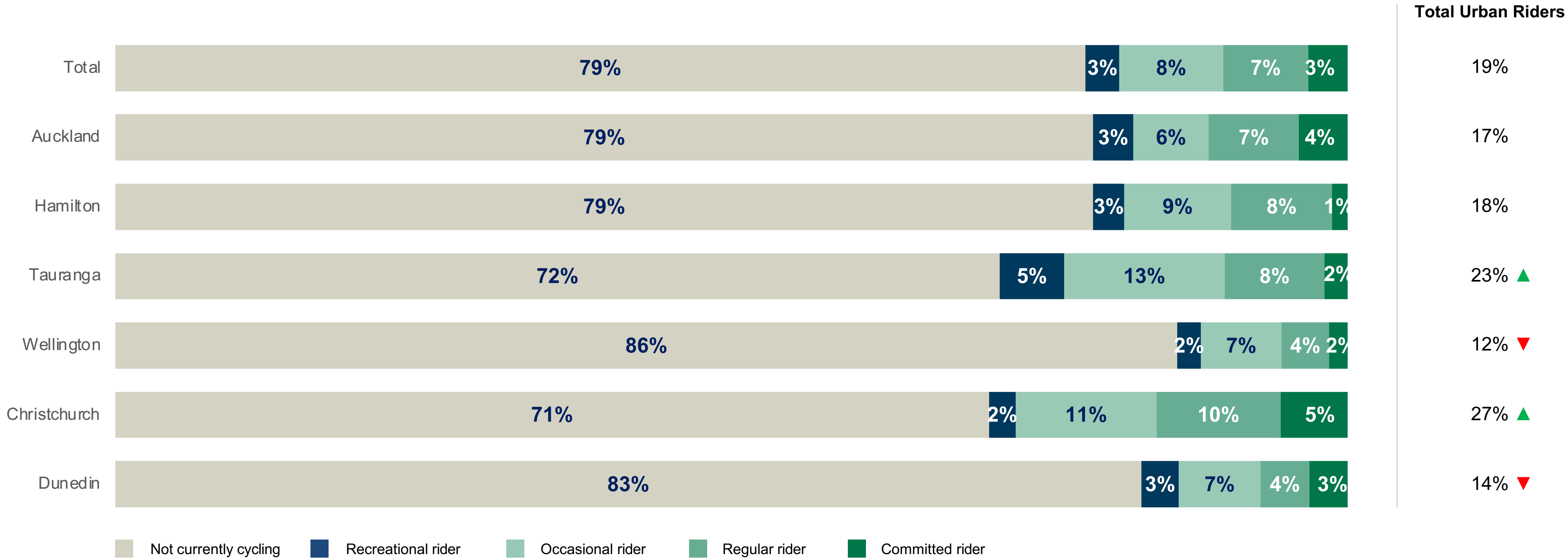
Q23a. Which of the following have you used in [REGION] in the past 12 months? Q6. How often do you currently ride a bicycle or e-bike?
Base: 2023 n=3170, 2022 n=3278, 2021 n=4924, 2020 n=2267 2019 n=2174, 2018 n=2115
Changes made to response options which impact ability to compare not currently riding, recreational riders and occasional riders

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

Christchurch and Tauranga have the highest proportion of Urban Riders across the country

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

JAN-DEC 23



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 2023 Total Sample n=3170, Auckland n=564, Hamilton n=505, Tauranga n=507, Wellington n=513, Christchurch n=569, Dunedin n=512

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

In most regions the level of Urban Riders remains relatively stable over time

URBAN RIDERS ACROSS REGIONS OVER TIME
2020 – 2023 YEARLY TRENDS

NET: Urban Riders

	2020	2021	2022	2023
Total	20%	20%	20%	19%
Auckland	18%	16%	16%	17%
Hamilton	22%	26% ▲	18% ▼	18%
Tauranga	23%	20%	23%	23%
Wellington	15%	15%	15%	12%
Christchurch	29%	28%	29%	27%
Dunedin	10%	13%	18% ▲	14% ▼

The proportion of Urban Riders in Hamilton has stabilised after a decline in 2022.

Urban Riders in Dunedin have decreased in 2023 after experiencing a slight uplift in 2022.

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 2020-2023 Total Sample n=2267-4924, Auckland n=554-1144, Hamilton n=209-583, Tauranga n=204-565, Wellington n=513-1037, Christchurch n= 505-1037

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

6

Support and opportunities for cycling

Summary: Support and Opportunities for Cycling

- Urban New Zealanders are highly supportive of cycling in the community (69%) and half of New Zealanders think it's a great way to get around (53%). This support and sentiment for cycling remains strong even through seasonal changes.
- Support for cycling has increased in Christchurch (73%) and is now the highest of any region.
- Over half of Urban New Zealanders are supportive of cycling investment regardless of whether they cycle or not. Increased infrastructure over time is helping to motivate cyclists to continue to cycle.
- Cyclists feel encouraged to cycle by their communities. In particular, family support for cycling has increased to 60% - a 6 point increase compared to 2022.
- Half of cyclists feel safe cycling in their region, and this remains above pre-covid levels. Those who cycle more frequently feel more safe cycling.
- Safety remains a key barrier for cycling. Public roads without cycle lanes, motor vehicles on the road, and cycling in the dark are key safety concerns for cyclists.

Over 2 in 3 people support cycling in their community, and half of New Zealanders think it's a great way to get around town

Support and perceptions of cycling have declined over time and are significantly lower than when they were first tracked in 2018.

SUPPORT OF CYCLING IN THE COMMUNITY - NET: SUPPORTIVE 6-10

69%

(+1%)

Are supportive of cycling

2022 68%
2021 68% ▼
2020 71%
2019 71%
2018 73%

PERCEPTIONS OF CYCLING - % STRONGLY AGREE / AGREE

53%

(-1%)

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

2022 54%
2021 56% ▼
2020 60% ▼
2019 67%
2018 68%

Q7X – Now please think about walking and cycling in general. How much do you agree or disagree with each of the following statements? (Agree = Strongly agree + agree)
Q6cTo what degree do you support cycling in your community?
Base Total Sample 2023 n= 3170, 2022 n= 3278 '2021 n=4942, 2020 n=2267, 2019 n=2174, 2018 n=2115

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

TRA

Three quarters of cyclists (73%) find it easy to get to where they want to go on a bike

Close to two-thirds of cyclists are satisfied with the ease of using cycle lanes, crossing roads and biking places with kids.

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

JAN-DEC 23

	Get to the place you want to go	Use the cycle lanes in your area	Bike to places with the kids *(Those with children under 15)*	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%

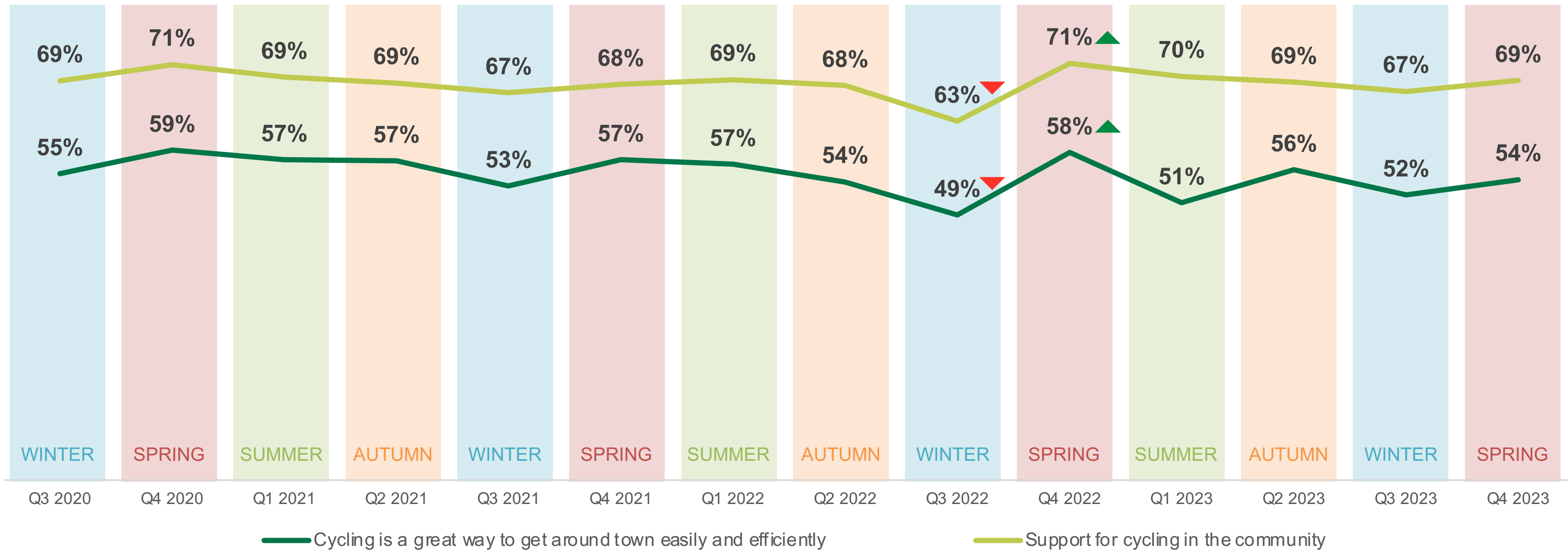
Q29a: Now we'd like you to think about when you are out and about biking in your area. Using the scale below, how easy do you find it to…
Base Cyclists 2023 n= 707, 2022 n=759, 2021 n=1180, 2020 n=567, With Children under 15 2023 n=209, 2022 n=191, 2021 n=293, 2020 n=142,

▲ Significantly higher than 2022 ▼ Significantly lower than 2022

Perceptions and support for cycling remain high overall despite some minor fluctuations throughout the seasons

Perceptions that cycling is a great way to get around typically dips in winter months, but this has also dropped in the first quarter of 2023 as New Zealand experienced the impact of Cyclone Gabrielle

PERCEPTIONS AND SUPPORT OF CYCLING
2020 – 2023 QUARTERLY TRENDS



Q7 - Now please tell us how much you agree or disagree with the following statements (Strongly agree + agree)
Q6 – To what degree do you support cycling in your community?
Base: Jul'20-Dec'23 quarters n=580-2595

▲ Significantly higher than previous period
▼ Significantly lower previous period

TRA

Support for cycling has increased in Christchurch since last year and has declined in Wellington

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

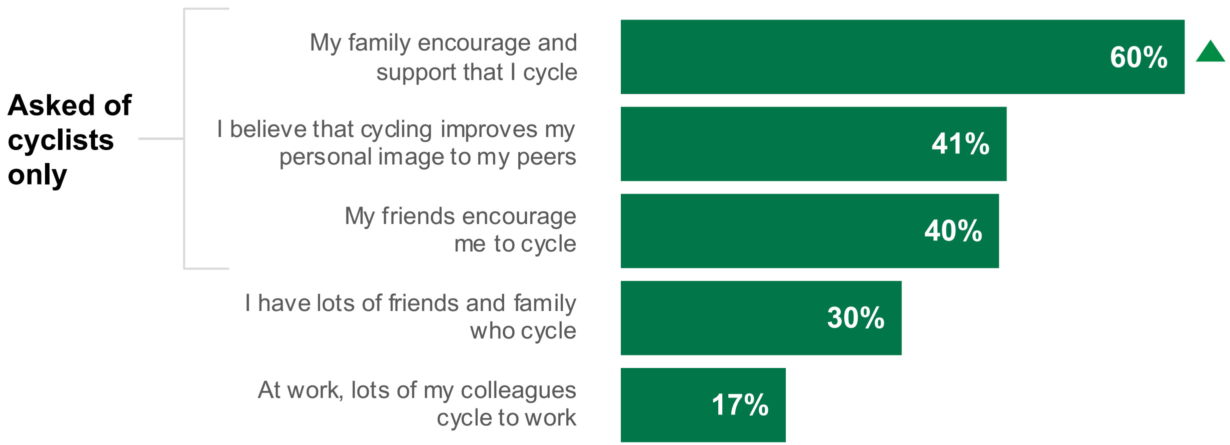
	June 2018	June 2019	June 2020	Jan-Dec 2021	Jan-Dec 2022	Jan –Dec 2023
Auckland	69%	68%	68%	64% ▼	67%	70%
Hamilton	77%	70% ▼	78%	72% ▼	65% ▼	67%
Tauranga	77%	73%	78% ▲	69% ▼	69%	68%
Wellington	74%	72%	71%	69% ▼	69%	65% ▼
Christchurch	72%	73%	68%	70%	69%	72% ▲
Dunedin	73%	70%	68%	69%	65%	69%

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: 2018 -2023 Auckland n=507-1144, Hamilton n=201-583, Tauranga n=200-565 Wellington n=500-1037, Christchurch n=505-1037, Dunedin n=200-558
No change to question wording and response options. Question order changed

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

Cyclists are feeling supported by those around them, and this has increased since last year

SOCIAL CYCLING PERCEPTIONS - % STRONGLY AGREE / AGREE
JAN-DEC 23



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

Q8 - How much do you agree or disagree with each of the following statements?
Base Total Sample 2023 n=3170, 2022 n=3278, 2021 n-2267, Cyclist only 2023 n=707, 2022 n=759, 2021 n=508, 2020 n=567

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

TRA

Half of people who cycle feel safe doing so and this has remained above pre-covid levels

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

JAN-DEC 23

53%

(+2%)

Feel safe cycling

2022 51% ▼
2021 55%
2020 56% △
2019 42%

▲ Significantly higher than previous year

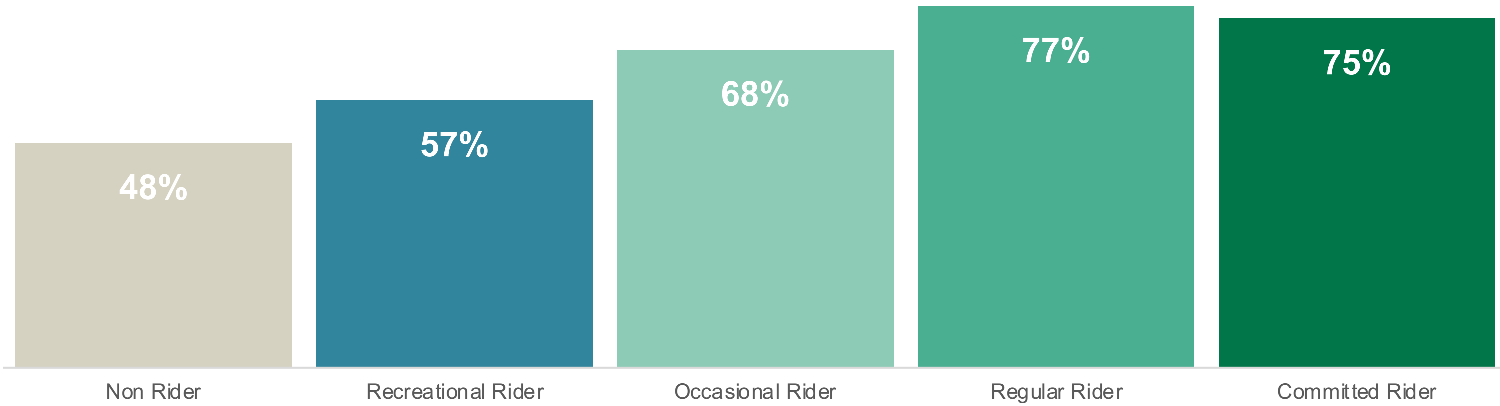
▼ Significantly lower than previous year

A5 - In general, how safe are you/would you be, riding a bicycle in [REGION]?
Base: Physically able to cycle 2023 n=2,780, 2022 n=2772, 2021 n=4194, 2020 n=1962, 2019 n=1836

Perceptions of safety remain higher amongst those cycling more regularly

This may be due to those who cycle more having higher confidence in their own abilities, as well as having more exposure to the safety infrastructure that has been put in place.

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



	Non Rider	Recreational Rider	Occasional Rider	Regular Rider	Committed Rider
2022	46%	57% ▼	63%	69%	86%
2021	49%	70%	67%	76%	80%
2020	50%	59%	75%	73%	84%

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 2020-2023 Committed Rider n = 63-151, Regular Rider n=119-304, Occasional Rider n=218-383, Recreational n= 93-181, Non Rider n=1469-3175

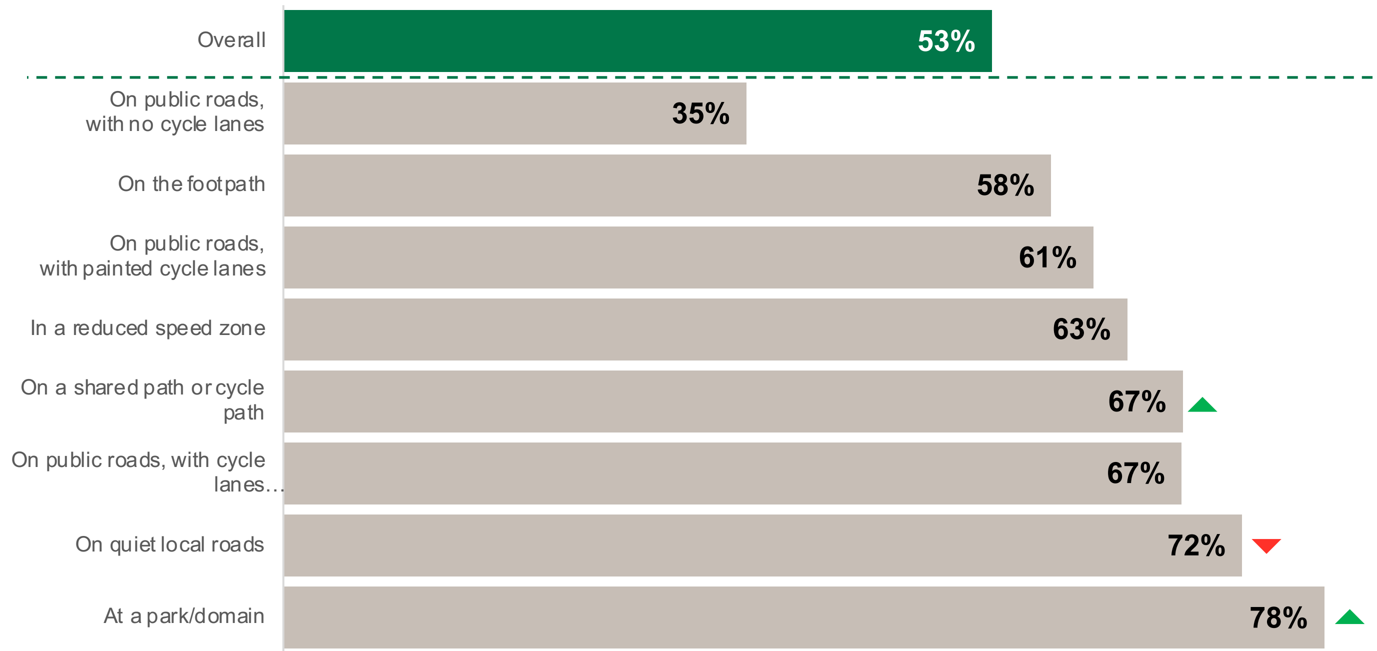
▲ Significantly higher than previous year

▼ Significantly lower than previous year

TRA

Cyclists feel safest in parks or on quiet local roads – areas where there are fewer cars

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



	2022	2021	2020	2019
Overall	**51%▼**	**55%**	**56%▲**	**42%**
On public roads, with no cycle lanes	36%	37%	37%▲	24%
On the footpath	57%▼	60%	58%▲	54%
On public roads, with painted cycle lanes	59%▼	63%	64%▲	60%
In a reduced speed zone	61%	63%	65%▲	58%
On a shared path or cycle path	63%▼	68%	68%	68%
On public roads, with cycle lanes…	66%	68%	69%	67%
On quiet local roads	79%▲	71%	73%▲	65%
At a park/domain	74%▼	77%	78%▼	82%

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 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 previous year
▼ Significantly lower than previous year

TRA

Despite improved perceptions of cycling infrastructure, safety and confidence continues to be the largest barriers to cycling

BARRIERS TO CYCLING
JAN-DEC 23

SAFETY AND CONFIDENCE

41% (+2%)
I don't feel safe because of how people drive

37% (+5%) ▲
I don't feel safe cycling in the dark

35% (+5%) ▲
I'm concerned about the speed of other road users

LOGISTICS BARRIERS

36% (+1%)
I always have too much to carry

34% (+2%)
It's not enjoyable because of the weather

EASE AND ACCESS

33% (+1%)
I don't have access to a bike

31% (+3%) ▲
Cycling is not a quick way for me to get where I need to go

27% (+3%) ▲
Having to shower and/or change after cycling is inconvenient

27% (=)
I live to far away to be practical

After declines in 2022, safety of cycling in the dark and concern about the speed of other road users have significantly increased as barriers in 2023.

There are also significant increases in cycling not being a quick way to get places and having to shower and/or change after cycling as 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, 2023 n- 2076, 2022 n=2772

▲ Significantly higher than 2022 ▼ Significantly lower than 2022

The key cycling barriers are even further pronounced among females

TOP BARRIERS TO CYCLING ACROSS DEMOGRAPHICS
JAN-DEC 23

	Total	18-34	35-54	55+	Male	Female	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
I don't feel safe because of how people drive	41%	40%	44% ▲	37% ▼	34% ▼	46% ▲	43%	40%	44%	41%	37%	39%
I don't feel safe cycling in the dark	37%	36%	36%	39%	30% ▼	44% ▲	41%	38%	37%	36%	35%	35%
I always have too much stuff to carry	36%	34%	39%	35%	31% ▼	41% ▲	36%	35%	39%	34%	35%	42% ▲
I'm concerned about the speed of other road users	35%	32% ▼	37%	36%	30% ▼	39% ▲	38%	36%	41% ▲	33%	30% ▼	35%
It's not enjoyable because of the weather	34%	34%	35%	34%	33%	35%	35%	28% ▼	23% ▼	37%	36%	39%
I don't have access to a bike	33%	31%	27% ▼	43% ▲	28% ▼	38% ▲	32%	30%	26% ▼	39% ▲	31%	39% ▲
Cycling is not a quick way for me to get where I need to go	31%	31%	30%	33%	29%	33%	32%	30%	37% ▲	28%	31%	31%
Having to shower and/or change after cycling is inconvenient	27%	34% ▲	27%	19% ▼	25% ▼	29% ▲	29%	26%	30%	26%	27%	23% ▼
I live too far away for it to be practical	27%	28%	27%	24%	28%	26%	33% ▲	20% ▼	28%	26%	23% ▼	25%

Q11b. Soemtimes 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 Cyclists Total Sample n=2076, 18-34 n=711, 35-43 n=719, 55+ n=646, Male n=972, Female n=1096, Auckland n=372, Hamilton n=321, Tauranga n=353, Wellington n=331, Christchurch n=357, Dunedin n=342

Over half of New Zealanders are supportive of investment into cycling infrastructure regardless of if they cycle or not

Support for investment has significantly increased in Auckland, Christchurch and Dunedin in 2023.

SUPPORT OF INVESTMENT IN INFRASTRUCTURE - % STRONGLY AGREE / AGREE
JAN-DEC 23

61% ▲
Investing in cycle lanes is important because it gives people more travel options
2022 57% ▼
2021 59%
2020 60%

56%
Investing in cycle lanes is important because it gets people outside exercising
2022 55%
2021 56% ▼
2020 59%

60% ▲
The opening of cycle ways/paths has encouraged me to cycle more (CYCLISTS ONLY)
2022 53%
2021 56%
2020 56%

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; 2023 n= 3170, 2022 n=3278, 2021 n=4924, 2020 n=2267, Cyclists Only 2023 n=707, 2022 n=759, 2021 n=1180, 2020 n=567

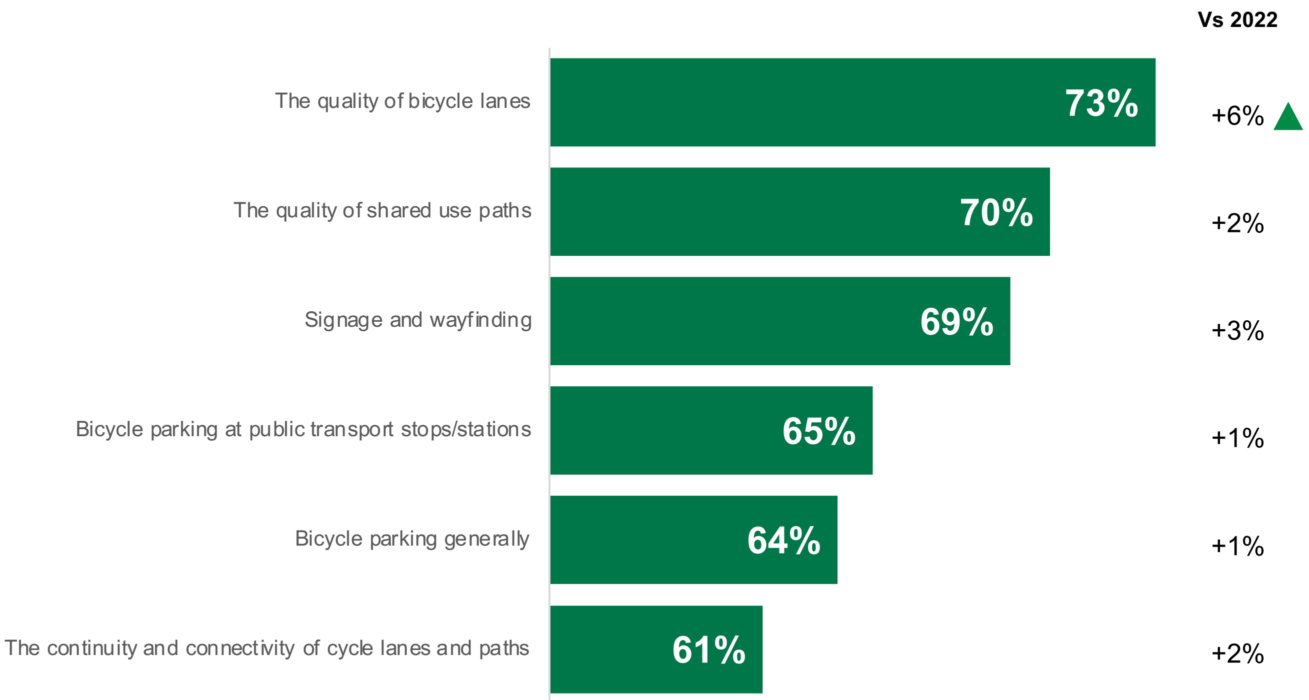
▲ Significantly higher than previous year
▼ Significantly lower than previous year

TRA

Satisfaction with the quality of bicycle lanes has increased with nearly three-quarters of cyclists satisfied

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

JAN-DEC 23



Q29b - Now please think about cycling infrastructure in [REGION].How satisfied are you with…?
Base Cyclists 2023 n=314, 2022 n=319
*Don't know excluded from analysis

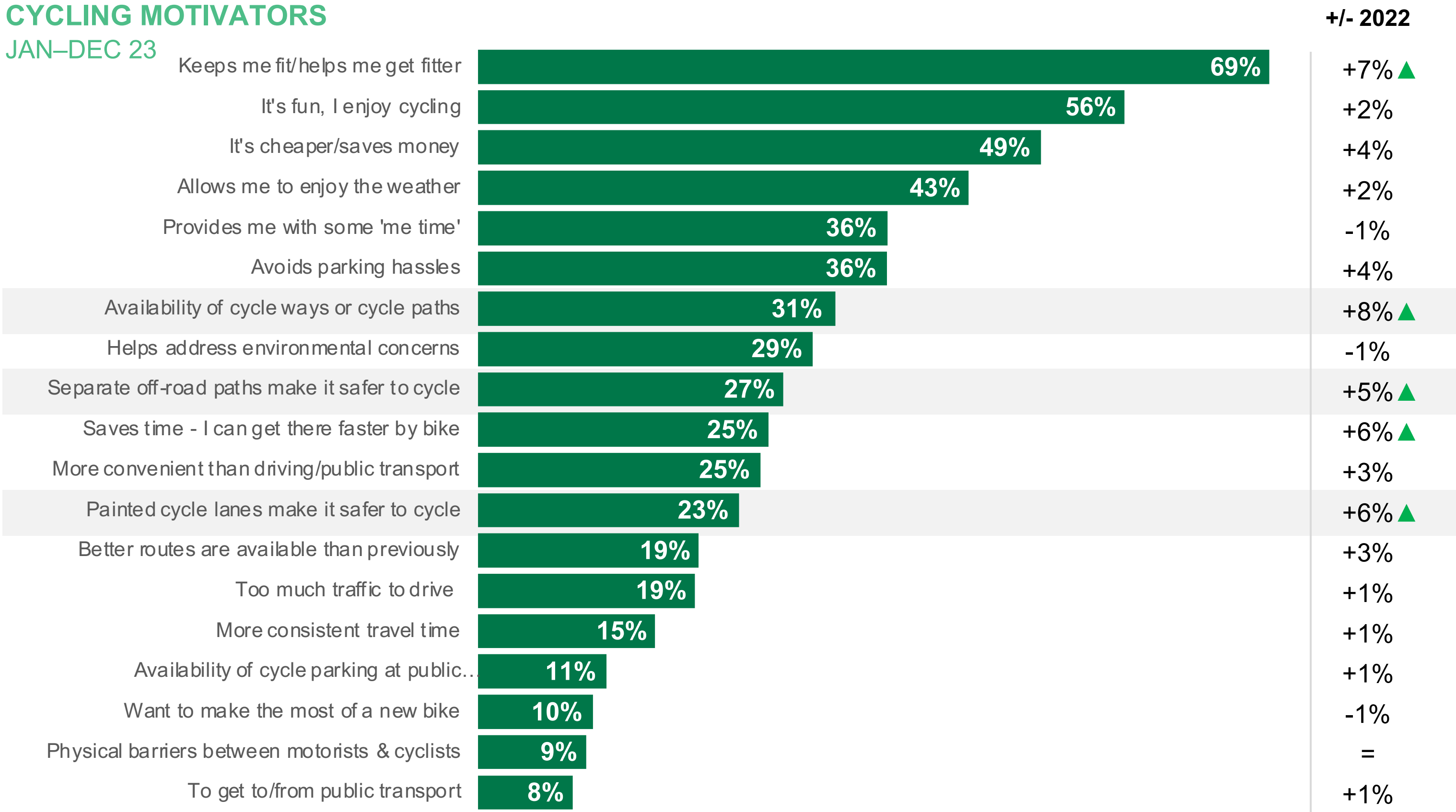
▲ Significantly higher than 2022 ▼ Significantly lower than 2022

TRA

Infrastructure improvements are motivating more people to cycle compared to last year

CYCLING MOTIVATORS

JAN–DEC 23



The top motivator for cycling is to keep /get fit with this increasing 7% since last year.

Enjoyment of cycling and saving money are also key motivators of cycling.

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

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

TRA

These infrastructure motivators are relatively consistent across all regions

CYCLING INFRASTRUCTURE MOTIVATORS BY REGION
JAN–DEC 23

	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
Availability of cycle ways or cycle paths	25%	32%	34%	36%	32%	30%
Separate off-road paths make it safer to cycle	23%	29%	25%	31%	28%	23%
Painted cycle lanes make it safer to cycle	25%	28%	18% ▼	30%	18% ▼	22%

Q11a. From the list below, what are the key reasons you choose to cycle?
Base Cyclists 2023 Auckland n=120, Hamilton n=106, Tauranga n=145, Wellington n=84, Christchurch n=162, Dunedin n=90

Traits of weekly cyclists: key perceptions, motivators and barriers

The biggest differences between those that cycle at least once a week to those who do not

Core perceptions of cycling

Those that cycle at least once a week are more likely than others to:

Be very supportive of cycling in the region (+34%)

Agree that cycling is a great way to get around (+34%)

Feel safe cycling in their region (+27%)

Motivators of cycling

Those that cycle at least once a week are more likely than others to be motivated by:

More convenient than driving / public transport (+15%)

Saves time – I can get there there by bike (+14%)

Helps address environmental concerns (+9%)

Reduced barriers to cycling

Those that cycle less than once a week are more likely than others to have these barriers:

I don’t have access to a bike (+35%)

Cycling is not a quick way for me to get to where I need to go (+21%)

I live to far away for it to be practical (+18%)

7

A closer look at Micro-mobility

Summary: A closer look at Micro-mobility

- Close to 1 in 5 New Zealanders own or have access to an e-bike (20% of people) and e-scooter (22% of people).
- The proportion of New Zealanders using an e-bike at least once a year has doubled to 6% in 2023 from 3% in 2018.
- 4% of New Zealanders are using an e-bike and 3% are using an e-scooter once a week.
- When people have access to an e-bike or scooter they are more likely to use them on a weekly basis.
- Males and Māori are more likely to be both weekly e-bike and e-scooter users. E-bike usage rates are highest in Tauranga, while e-scooter rates are highest in Hamilton.
- Of those without access to an e-bike, almost 1 in 3 are interested in owning an e-bike.
- Cost and security remain the key barriers for those interested in owning an e-bike.

1 in 5 New Zealanders have access to an e-bike or e-scooter in 2023

ACCESS OR OWNERSHIP OF E-BIKES AND E-SCOOTERS

JAN-DEC 23

20%

Own or have access to an e-bike

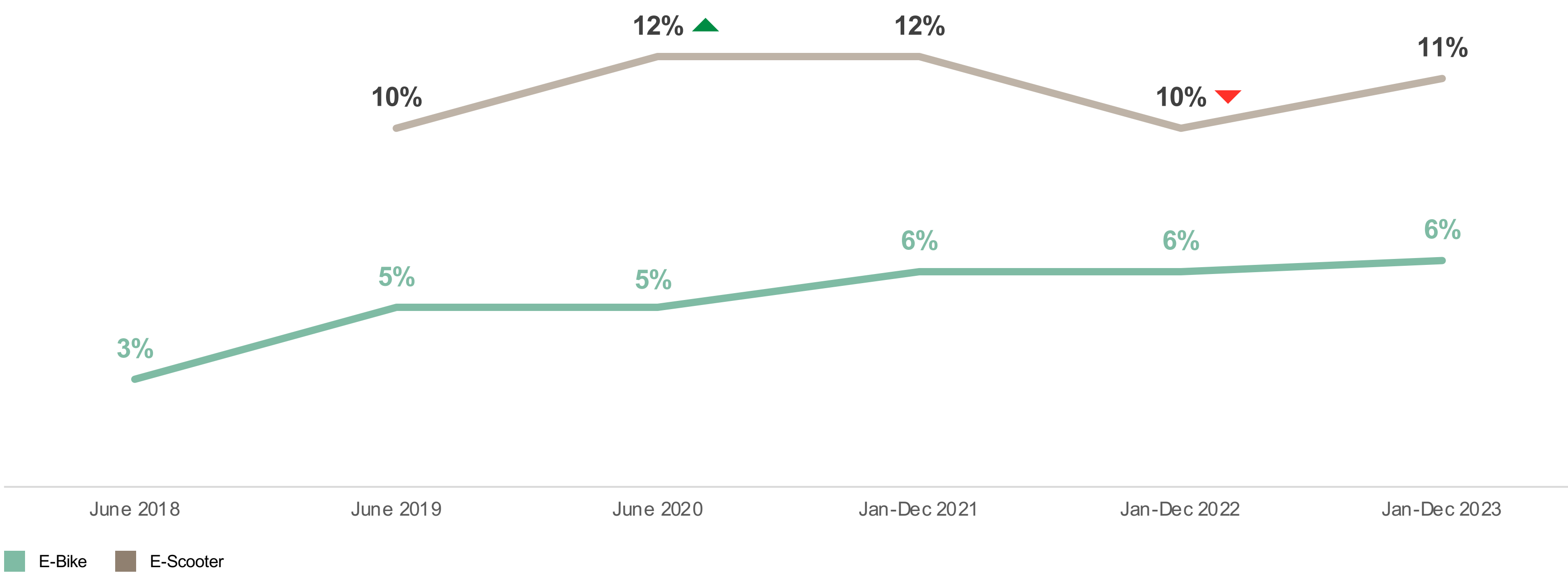
22%

Own or have access to an e-scooter

Q2A: Do you own or have access to an e-bike you could easily use?, Q2B: Do you own or have access to an e-scooter you could easily use?
Base Total Sample 2023 n= 3170

E-bike usage has doubled since 2018 and e-scooter usage remains relative stable across time

E-BIKE AND E-SCOOTER USAGE AT LEAST ONCE A YEAR
2018 – 2023 YEARLY TRENDS



Q23a. Which of the following have you used in the past 12 months?
Base Total Sample 2023 n= 3170, 2022 n=3278, 2021 n=4924, 2020 n=2267 n= 2019 n=2174, 2018 n=2115
E-scooters were not included in 2018 survey

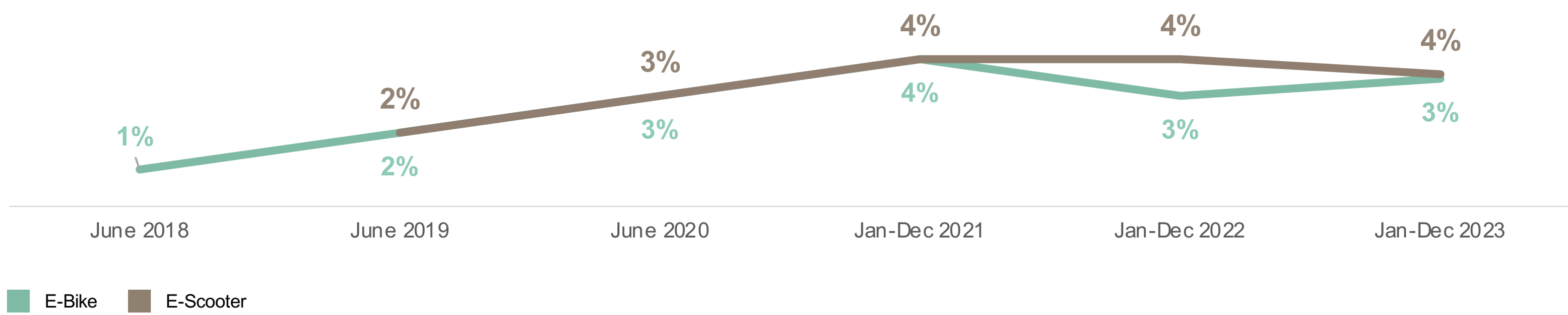
▲ Significantly higher than previous year ▼ Significantly lower than previous year

TRA

Weekly usage remains stable, with 5% of urban New Zealanders using either an e-bike or e-scooter on a weekly basis

E-BIKE AND E-SCOOTER USAGE AT LEAST ONCE A WEEK

2018 – 2023 YEARLY TRENDS



Q24. On average, now often do you use each of the following modes of transport, for any reason
Base Total Sample 2023 n= 3170, 2022 n=3278, 2021 n=4924, 2020 n=2267 n= 2019 n=2174, 2018 n=2115
E-scooters were not included in 2018 survey

▲ Significantly higher than previous year

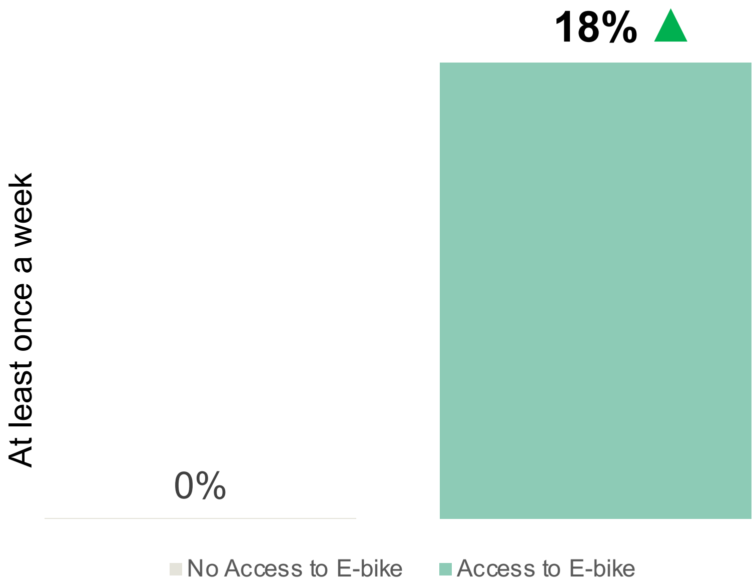
▼ Significantly lower than previous year

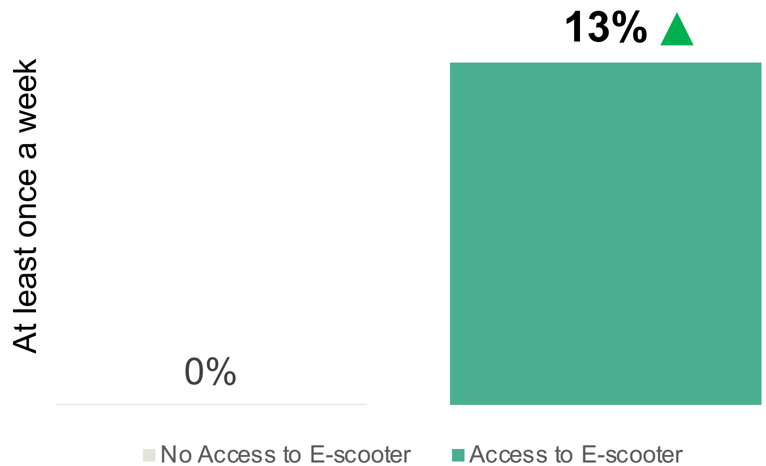
TRA

When people have access to an e-bike or e-scooter they are more likely to use them on a weekly basis

E-BIKE AND E-SCOOTER WEEKLY USAGE AMONG THOSE WITH ACCESS

JAN–DEC 23





Q24. On average, how often do you use each of the following modes of transport, for any reason, Q2A: Do you own or have access to an e-bike you could easily use?, Q2B: Do you own or have access to an e-scooter you could easily use?
Base 2023 access to E-bike n= 428, Not access to E-bike n= 1677, Access to E-scooter n= 461, Not access to E-scooter n=1665

▲ Significantly higher ▼ Significantly lower

Weekly and yearly users of e-scooters are more likely to be 18-34 year olds, while e-bike users skew towards males

E-BIKE AND E-SCOOTER PROFILING
JAN-DEC 23

		E BIKE		E SCOOTER	
	TOTAL	WEEKLY	**LAST 12M**	WEEKLY	LAST 12M
18-34	**33%**	37%	33%	72% ▲	65% ▲
35-54	**34%**	38%	34%	28%	31%
55+	**33%**	24%	32%	0% ▼	4% ▼
Male	**48%**	70% ▲	64% ▲	78% ▲	58%
Female	**51%**	30% ▼	36% ▼	22% ▼	42%
Pakeha/NZ Euro	**66%**	67%	69%	59%	64%
Māori	**11%**	25% ▲	16%	25% ▲	19%
Pacific	**6%**	1% ▼	2% ▼	7%	8%
Asian	**17%**	10%	14%	21%	17%
Less than $50k	**23%**	18%	21%	18%	19%
$50k-$99k	**31%**	36%	33%	44%	32%
$100k or more	**36%**	43%	41%	38%	42%

E-bike users are significantly more likely to be:

- Male
- Māori

E-scooter users are significantly more likely to be:

- Under 35
- Male
- Māori

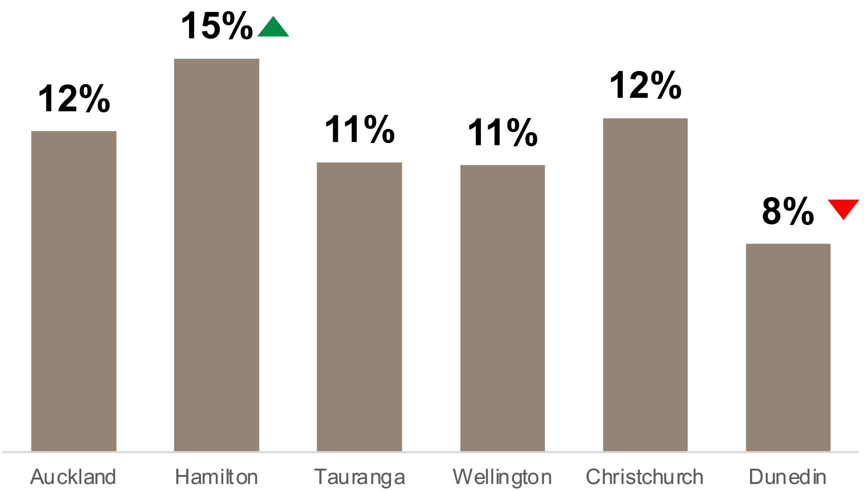
Among weekly users, the skew toward male users is particularly pronounced.

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 2023 E-bike Weekly n = 119 E-bike Last 12M n= 218, E-scooter weekly n= 103 E-scooter Last 12M n= 352

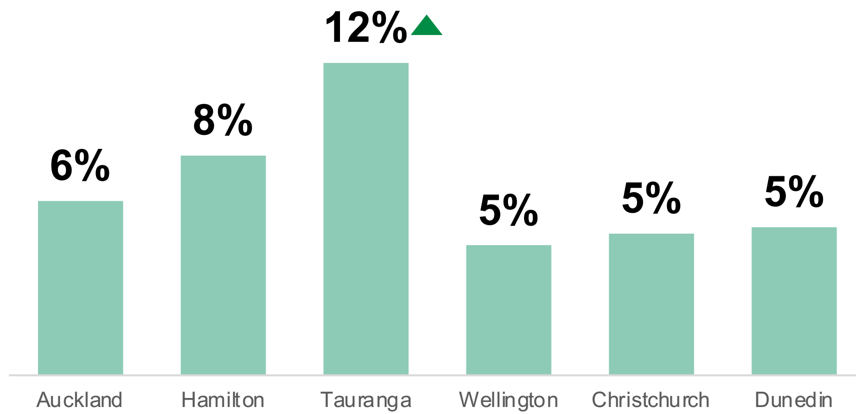
▲ Significantly higher than total ▼ Significantly lower than total

Hamilton has the highest usage of e-scooters while people living in Tauranga are more likely to be using e-bikes

E-SCOOTER PAST 12M USAGE BY REGION
JAN-DEC 23



E-BIKE PAST 12M USAGE BY REGION
JAN-DEC 23



Q23a. Which of the following have you used in the past 12 months?
Base 2023 Auckland n=564, Hamilton n=505, Tauranga n=507, Wellington n=513, Christchurch n=569, Dunedin n=512

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

Of those who don't have access to an e-bike, over 1 in 4 are interested in owning one

INTEREST IN OWNING AN E-BIKE
JAN-DEC 23

28%

Are interested in owning an e-bike

Overall e-bike interest is significantly higher among

- 18-34
- $50-99k household income
- Part time workers

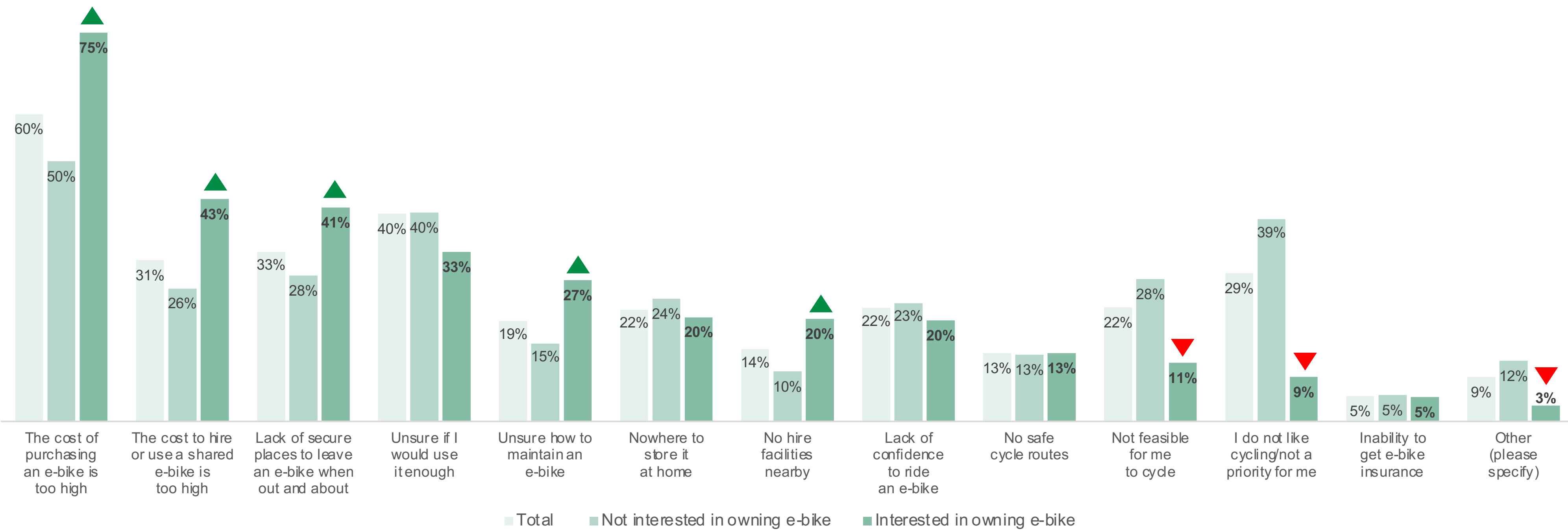
Overall e-bike interest is significantly lower among

- 55+
- Pakeha/NZ European
- Older households
- Retirees

Q6_EBIKE_INTEREST1: How interested are you in owning an e-bike? Base n= 644

Cost and security are the biggest barriers preventing people from using an e-bike and this barrier is greater for those currently interested in owning an e-bike

BARRIERS TO USING AN E-BIKE BY INTEREST GROUPS
JAN-DEC 23



Q6_EBIKE_BARRIER: What are the main barrier(s) stopping you from using an e-bike?
Base Total Sample n=583, Interested in owning e-bike n=151, Not interested in owning e-bike n=326

▲ Significantly higher among those interested in owning an e-bike
▼ Significantly lower among those interested in owning an e-bike

TRA

8

Deep dive into children, youth and 65+

TRA

Summary: Deep dive into children, youth and 65+

- Those aged 18-24 regularly use active modes across a wide range of trip types. They are more likely to be Committed Walkers (walking most days to get around) compared to other age groups. They are also more likely to have access to an e-bike and e-scooter than other age groups.
- Three-quarters of people aged 65+ use active modes. They are less likely to be Urban Walkers and Urban Riders compared to other age groups. However, they still have high support for walking and cycling in the communities and have the highest safety perceptions for walking of any age group.
- Over three-fifths of parents with kids under 15 perceive it as being easy to walk and bike places with the kids. People also perceive it is safe to walk around schools and for kids to walk to school. Two-fifths perceive it as safe for kids to cycle to school.

TRA

Most people feel it is easy to walk with kids and most cyclists feel it is easy to bike places with kids

People also generally feel safe walking around schools with three-fifths perceiving it to be safe for kids to walk to schools. Two-fifths perceive it is safe for kids to cycle to school.

MODE TRAVELLED BY TYPES OF TRIP IN THE LAST WEEK

JAN–DEC 23

	Total	To get to or from school, college, university	To take children to or from school/day care
Car	47%	34%▼	63%▲
Cycling	3%	3%	2%
Walking	35%	32%	22%▼
Train	2%	3%	1%▼
Bus	6%	14%▲	5%
E-scooter	1%	4%	1%

PERCEPTIONS OF WALKING AROUND SCHOOLS – % OF PEOPLE WHO FEEL SAFE (6-10)

85%

Of people feel safe walking around schools

EASE OF WALKING AND CYCLING WITH KIDS - % VERY EASY / EASY

JAN-DEC 23

Walk to places with the kids
(Those with children under 15)

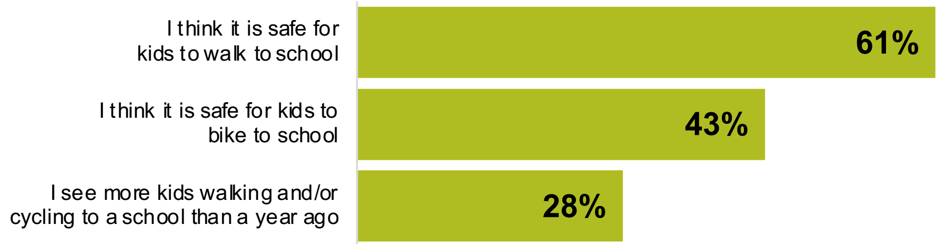
68%

Bike to places with the kids [amongst cyclists]
(Those with children under 15)

62%

Q26. Thinking about the past week, how many times did you use each type of transport when traveling for these occasions?
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…
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: Total Sample 2023 n=3170, cyclists n=707

PERCEPTIONS OF WALKING AROUND SCHOOLS – % OF PEOPLE WHO AGREE / STRONGLY AGREE



Q7A - In general, how safe are you/would you be walking in the [REGION] area? (NET Safe: 6-10 out of 10)
Q7X – Now think about walking and cycling in general. How much do you agree or disagree with each of the following statements
Base: Total sample 2023 n3107, physically able to walk 2023 n= 2767

Younger people are more likely to be using active modes to get around and are using active modes on a wider variety of trip types

OVERALL TRAVEL BEHAVIOUR – 18-24

JAN-DEC 23

96% ▲

Have used active modes in the past 12 months

Trip Type	%
To get to or from work	60% ▲
To get to or from school, college, university	34% ▲
To go to or from visiting friends or family	64% ▲
To get to or from shops	82% ▼
As a part of my job (e.g. couriers, work errands, meetings)	19%
To get to or from somewhere else	47%
To take children to or from school/day care	8% ▼
To get to or from doctor/dentist/pharmacy etc	32% ▼
To get to or from a place of recreation,	44% ▲

OVERALL TRAVEL BEHAVIOUR – 65+

JAN-DEC 23

87% ▼

Have used active modes in the past 12 months

Trip Type	%
To get to or from work	18% ▼
To get to or from school, college, university	1% ▼
To go to or from visiting friends or family	53% ▼
To get to or from shops	90% ▲
As a part of my job (e.g. couriers, work errands, meetings)	7% ▼
To get to or from somewhere else	44%
To take children to or from school/day care	9% ▼
To get to or from doctor/dentist/pharmacy etc	47% ▲
To get to or from a place of recreation,	24% ▼

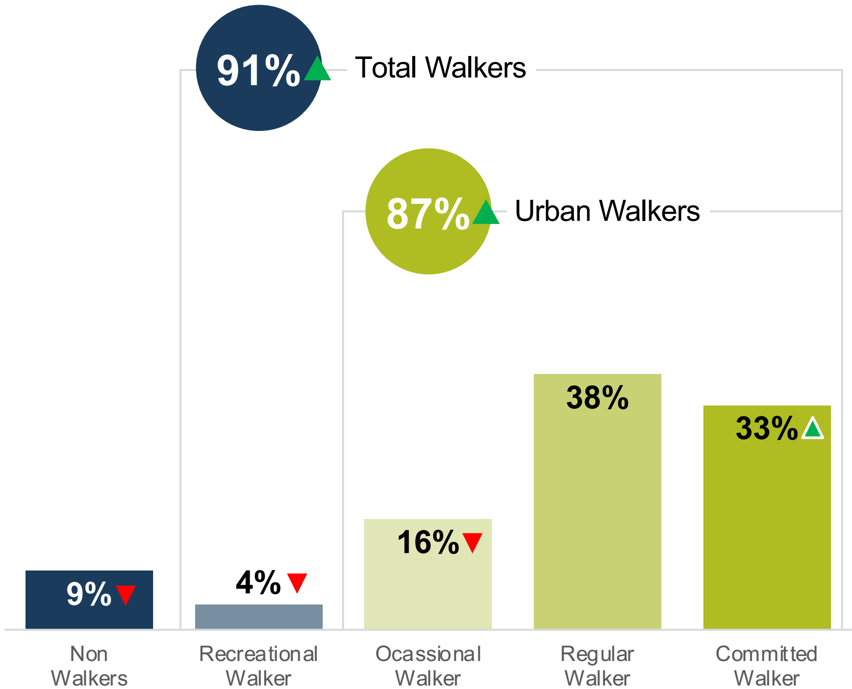
Q23A: Which of the following have you used in [Region] in the past 12 months? This can be for any reason, including work, sport or recreation. Q23b; You indicated that you have not walked 100m or crossed the road in the last 12 months. Are you sure?
Active modes = Walk for at least 100m and/or cross the road or cycled
Base Total Sample Apr-Dec 2023 18-24 n=286, 65+ n=484
*Change in methodology to prompt those who said they did not walk and ask again. This does not allow comparison across time. The change was made in April 2023 so the data only includes Apr-Dec'23.
Q25. Thinking about all of the travel you have done in the past week. What types of trips have you travelled for in the past week?
Base 2023 18-24 n=367, 65+ n=648

▲ Significantly higher than other groups
▼ Significantly lower than other groups

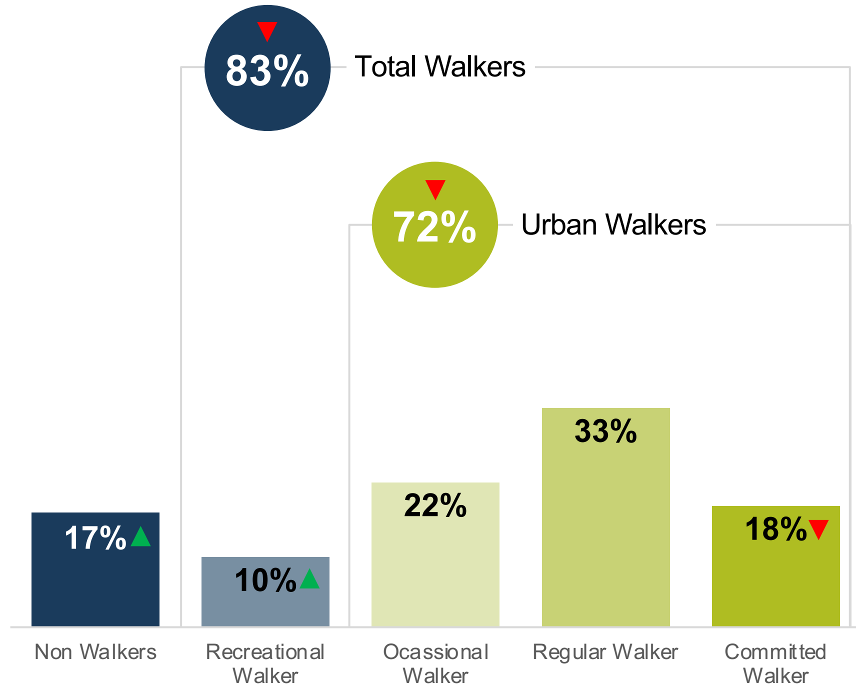
TRA

18-24 use walking as a key transport method to get around, while those 65+ are more likely to be walking for recreation

WALKING SEGEMENTS – 18-24
APR-DEC 23



WALKING SEGMENTS – 65+
APR-DEC 23



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 18-24 n= 367, 65+ n=648
*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.

▲ Significantly higher than other age groups
▼ Significantly lower than other age groups

TRA

Those aged 65+ feel safer walking, although walking at night is a key barrier for both age groups

Younger people are more likely to live in urban areas and dense cities (Auckland, Wellington, Christchurch) and tend to have lived in the area only for a short period of time – potentially affecting the perceptions of safety in their region.

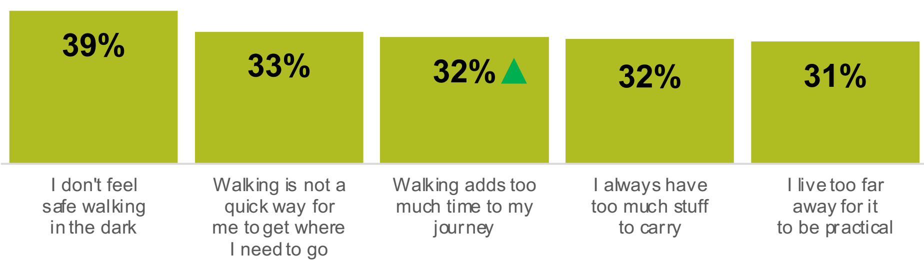
PERCEPTIONS OF WALKING – 18-24
JAN-DEC 23

90% Supportive of walking

69% Feel walking is a great way to get around

75% ▼ Feel safe walking

BARRIERS TO WALKING – 18-24
JAN-DEC'23



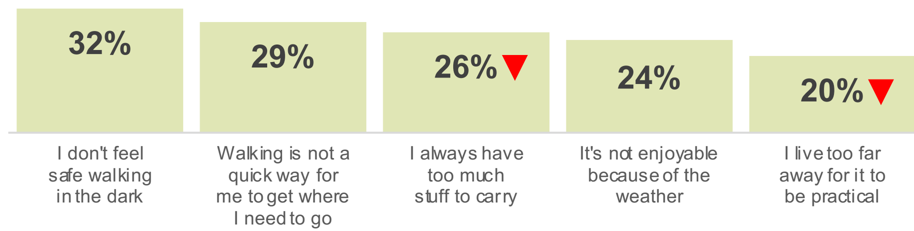
PERCEPTIONS OF WALKING – 65+
JAN-DEC 23

91% Supportive of walking

71% Feel walking is a great way to get around

84% ▲ Feel safe walking

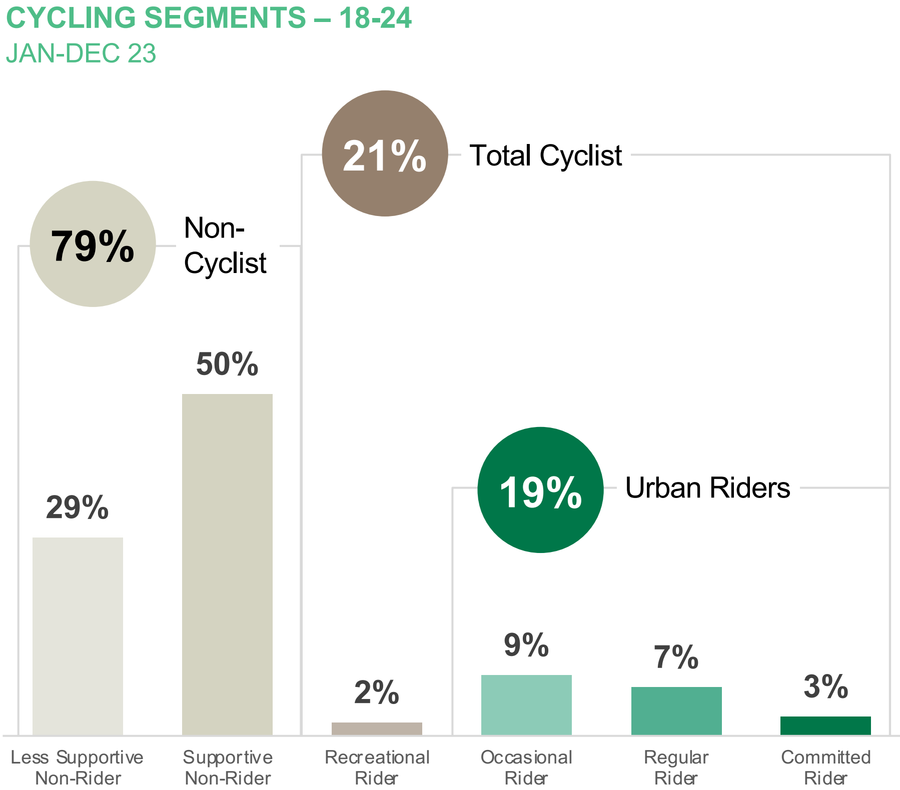
BARRIERS TO WALKING – 65+
JAN-DEC'23

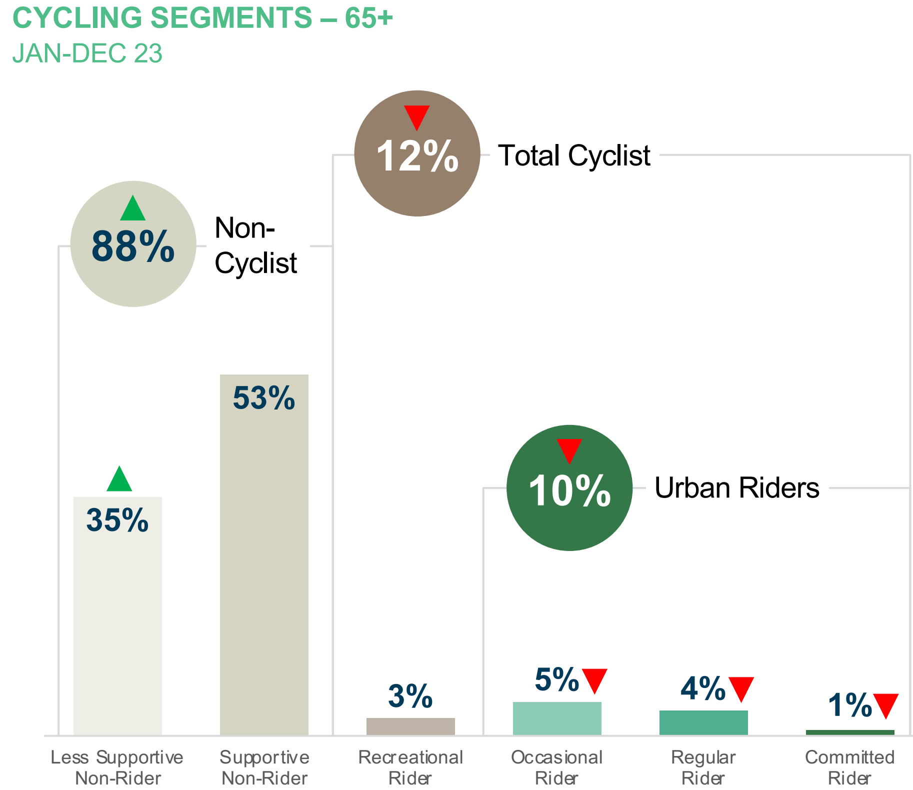


Q7X - Now please tell us how much you agree or disagree with the following statements (Strongly agree + agree)
Q6d: Now thinking about walking and people who choose to walk for journeys such as travelling to work, going to shops or other activities. To what degree do you support walking in your community? Q7A - In general, how safe are you/would you be walking in the [REGION] area?
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 Total 18-24 n= 367, 65+ n=648, Physically able to walk 18-24 n=338, 65+ n=504

▲ Significantly higher than other age groups
▼ Significantly lower than other age groups

Those aged 65+ are less likely to be cycling and there is a significantly higher proportion of less supportive non-riders amongst those 65+





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 2023 18-24 n=367, 65+ n=648

▲ Significantly higher than other age groups ▼ Significantly lower than other age groups

Amongst 18-24 year olds, access to and the ability to ride a bike is in line with the total sample. However, those aged 65+ are less likely to be able to ride a bike and are less likely to have access to one.

CYCLING ABILITY AND ACCESS – 18-24
JAN-DEC 23

86%
Can ride a bicycle

Yes - I can ride a bicycle	86%
No - I cannot currently ride a bicycle, but I have ridden before	8%▼
No - I cannot ride a bicycle and have never ridden before	6%

50%
Own or have access to a bike

Yes - I own a bike in working order	26%
Yes - I can easily borrow or hire one	17%▲
Yes - but it's not in working order	7%
No - I don't own one or have access to one	50%

CYCLING ABILITY AND ACCESS – 65+
JAN-DEC **23**

73%▼
Can ride a bicycle

Yes - I can ride a bicycle	73% ▼
No - I cannot currently ride a bicycle, but I have ridden before	21% ▲
No - I cannot ride a bicycle and have never ridden before	6%

30%▼
Own or have access to a bike

Yes - I own a bike in working order	21%▼
Yes - I can easily borrow or hire one	4%▼
Yes - but it's not in working order	4%▼
No - I don't own one or have access to one	70%▲

Q2X: Can you ride a bicycle
Base 18-24 n=277, 65+ n=392
Q2: Do you own or have access to a bicycle (ie. a non-electric push bike) you could easily use *updated in Apr'23,
Base 18-24 n=349, 65+ n=483

▲ Significantly higher than other age groups
▼ Significantly lower than other age groups

TRA

Those aged 65+ are less supportive of cycling and do not feel as safe cycling. Their main barrier to cycling is bike access.

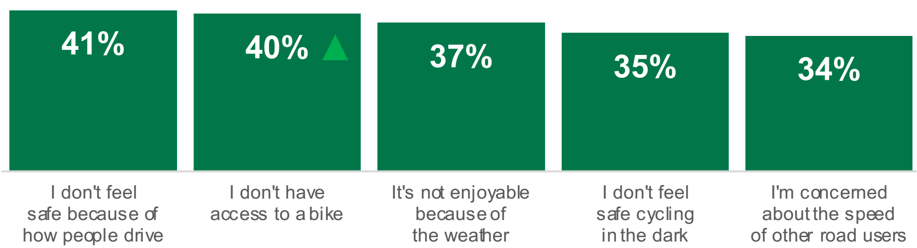
PERCEPTIONS OF CYCLING – 18-24
JAN-DEC 23

68% Supportive of cycling

60% ▲ Cycling is a great way to get around

56% Feel safe cycling

BARRIERS TO CYCLING – 18-24
JAN-DEC 23



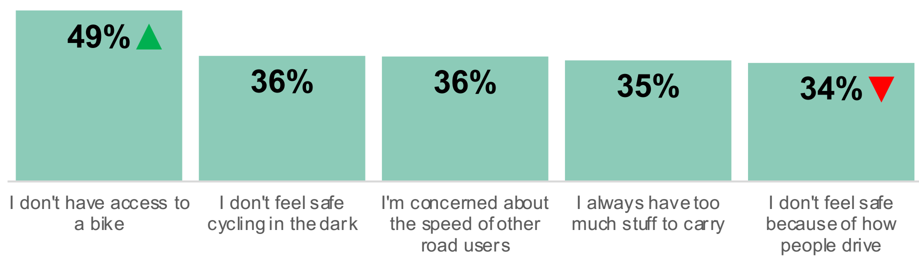
PERCEPTIONS OF CYCLING – 65+
JAN-DEC 23

64% ▼ Supportive of cycling

47% ▼ Cycling is a great way to get around

38% ▼ Feel safe cycling

BARRIERS TO CYCLING – 65+
JAN-DEC 23



Q7X - Now please tell us how much you agree or disagree with the following statements (Strongly agree + agree)
Q6C: There are varying levels of support in the community for people who choose to cycle for journeys such as travelling to work, going to shops or other activities. To what degree do you support cycling in your community?
Base 2023 18-24 n=367, 65+ n=648,
A5X: In general, how safe are you/would you be, riding a bicycle in [region]?
Base Physically able to cycle 2023 18-24 n= 349, 65+ n=483
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 2023 18-24 n=265, 65+ n=369

▲ Significantly higher than other age groups
▼ Significantly lower than other age groups

Accessibility to an e-bike or e-scooter is higher among our 18-24 audience with them more likely to be borrowing or hiring than owning

MICROMOBILITY ACCESS – 18-24

JAN-DEC 23

27% ▲

Have access to an e-bike

Yes - I own an e-bike in working order	3% ▼
Yes - I can easily borrow or hire one	21% ▲
Yes - but it's not in working order	3%
No - I don't own one or have access to one	73% ▼

34% ▲

Have access to an e-scooter

Yes - I own an e-scooter in working order	2%
Yes - I can easily borrow or hire one	27% ▲
Yes - but it's not in working order	5% ▲
No - I don't own one or have access to one	66% ▼

MICROMOBILITY ACCESS – 65+

JAN-DEC 23

11% ▼

Have access to an e-bike

Yes - I own an e-bike in working order	9%
Yes - I can easily borrow or hire one	2% ▼
Yes - but it's not in working order	0% ▼
No - I don't own one or have access to one	89% ▲

7% ▼

Have access to an e-scooter

Yes - I own an e-scooter in working order	2% ▼
Yes - I can easily borrow or hire one	4% ▼
Yes - but it's not in working order	1% ▼
No - I don't own one or have access to one	93% ▲

Q2A: Do you own or have access to an e-bike you could easily use?
Base 2023 18-24 n=276, 65+ n=359
Do you own or have access to an e-scooter you could easily use?
Base 2023 18-24 n=277, 65+n=376

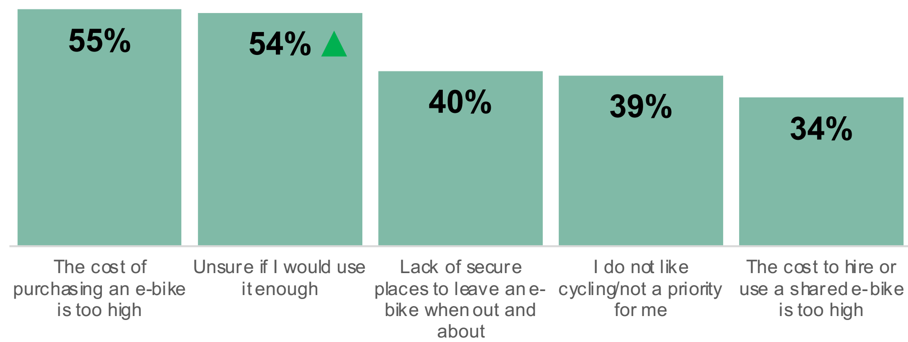
▲ Significantly higher than other age groups
▼ Significantly lower than other age groups

Cost and intended usage are key barriers for owning an e-bike across age groups, despite varied levels of interest

E-BIKE OWNERSHIP INTEREST AND BARRIERS – 18-24
JAN-DEC 23

27%

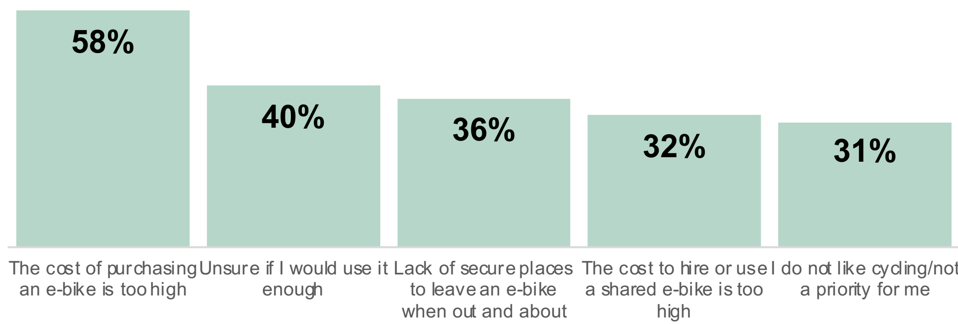
Of those who do not currently own an e-bike are interested in buying one



E-BIKE OWNERSHIP INTEREST AND BARRIERS – 65+
JAN-DEC 23

12%

Of those who do not currently own an e-bike are interested in buying one



Q6_EBIKE_INTEREST1: How interested are you in owning an e-bike?
Base Don't own an e-bike 2023 18-24 n=77, 65+ n=105
Q6_EBIKE_BARRIER: What are the main barrier(s) stopping you from using an e-bike?
Base Don't have access to or have a working e-bike 2023 18-24 n=62, 65+ n=104

▲ Significantly higher than other age groups
▼ Significantly lower than other age groups

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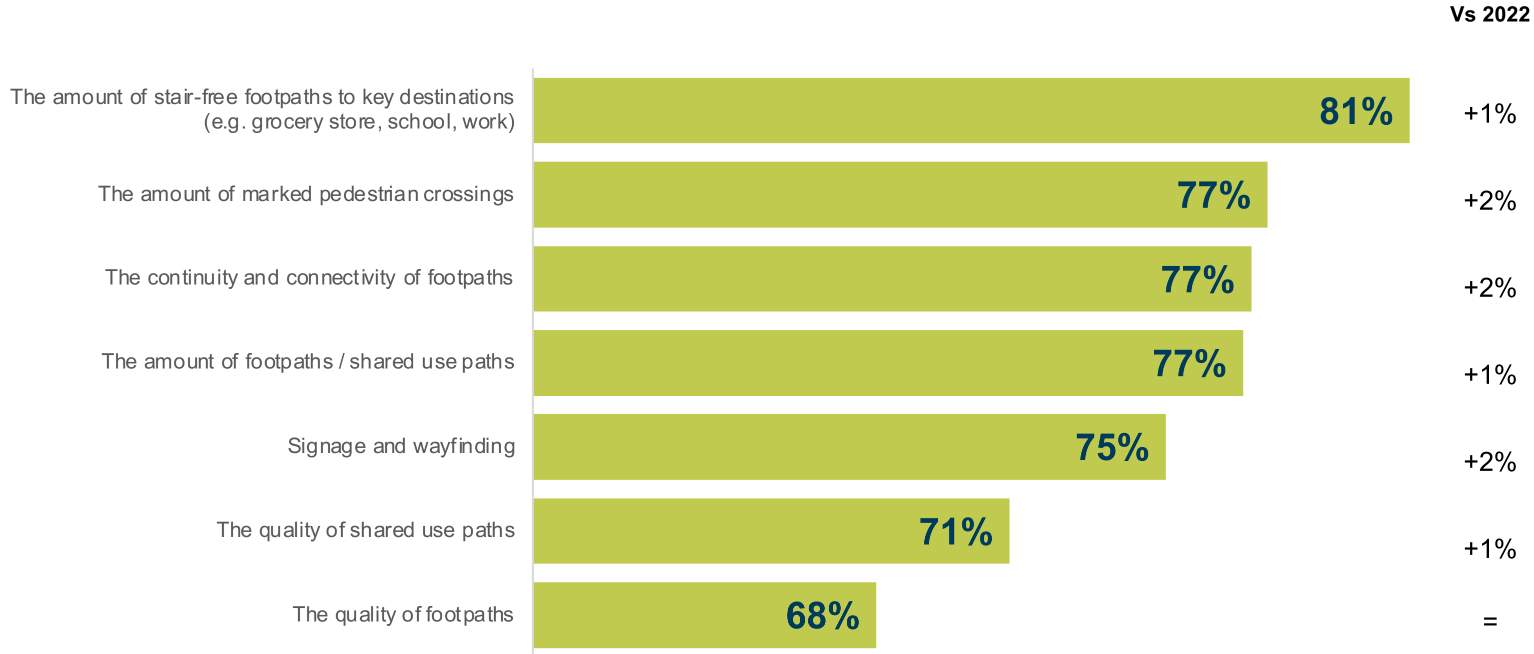
Appendix

TRA

People are generally satisfied with walking infrastructure in their region

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

JAN-DEC 23



Q29c - Now thinking about pedestrian infrastructure in [REGION].How satisfied are you with…?
Base sample physically able to walk 2023 n= 2575, 2022 n=2151
*Don't know excluded from analysis

▲ Significantly higher than 2022 ▼ Significantly lower than 2022

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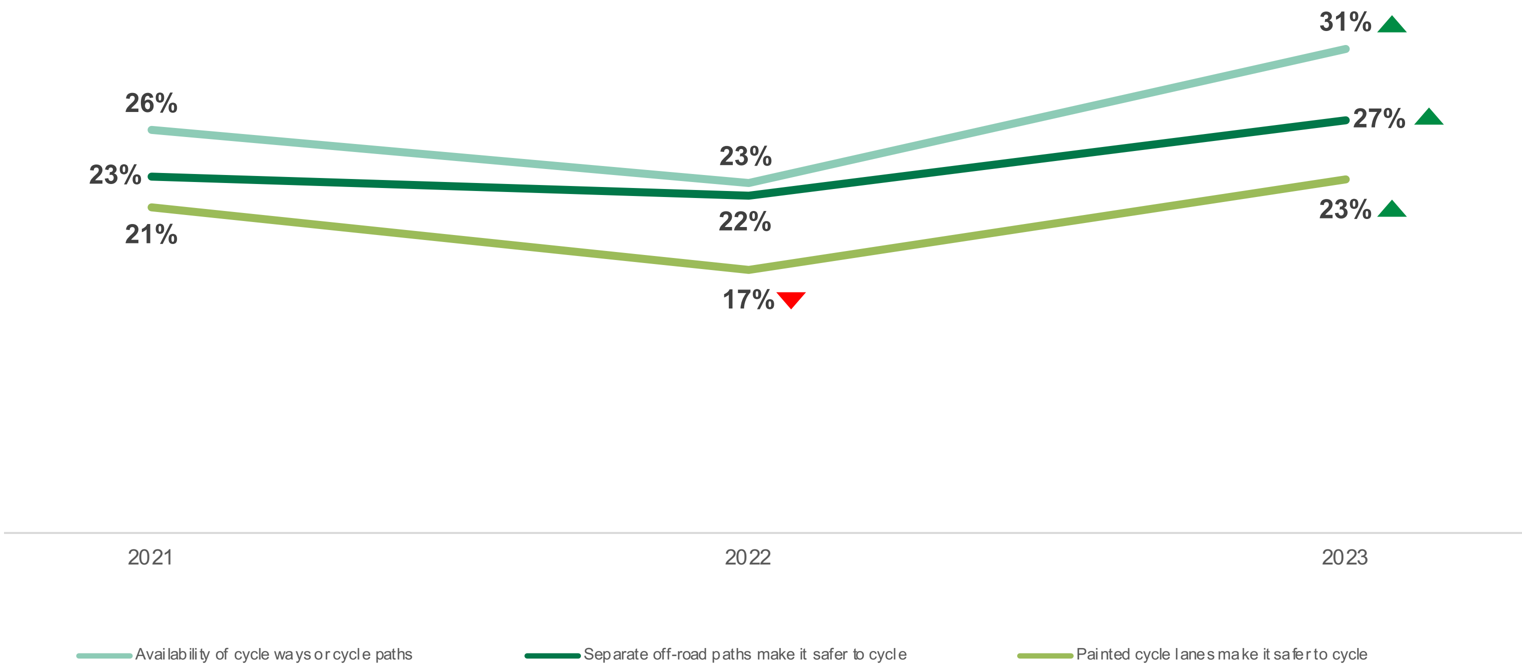
The availability of purpose-built cycling infrastructure is helping to motivate cyclists

CYCLING INFRASTRUCTURE MOTIVATORS OVER TIME

JAN-DEC 23



Q11a. From the list below, what are the key reasons you choose to cycle?
Base Cyclists 2023 n=707, 2022 n=759, 2021 n=95

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

TRA