

Active Modes Research

June 2014

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Ipsos Ltd operates a management system that complies with the requirements of ISO 20252.





Questions we'll address today:

Who is cycling?

Who is walking?

What do people think about cyclists, cycling & walking?

How is cycling perceptions & behaviour changing?



How are people cycling & walking?

Why cycle or why not?

Why walk or why not?

What about e-bikes?

What about AT in all of this?





Research Approach

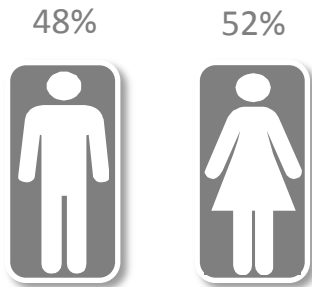
An online survey was conducted with the wider **Auckland population** (aged 15+ years).

- Participants were drawn from the Research Now online research panel.
- A total of n=1,250 interviews were completed.
- To ensure a representative mix of the population the general public sample was weighted by age nested with gender and Auckland Council ward areas.

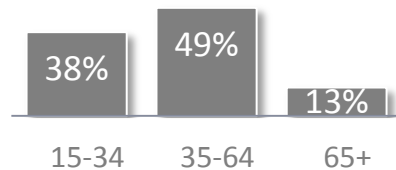


Sample profile: Auckland general public

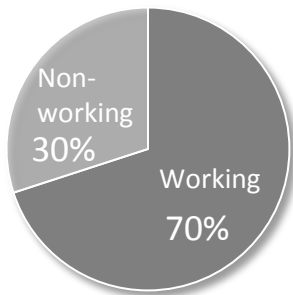
Gender



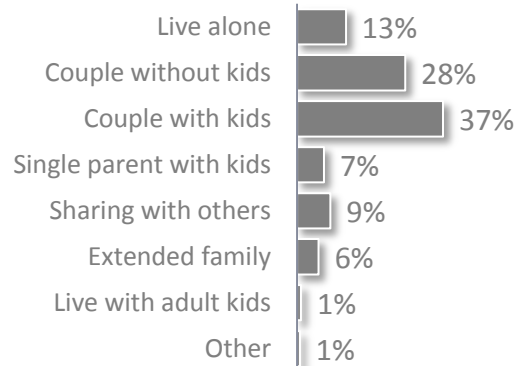
Age



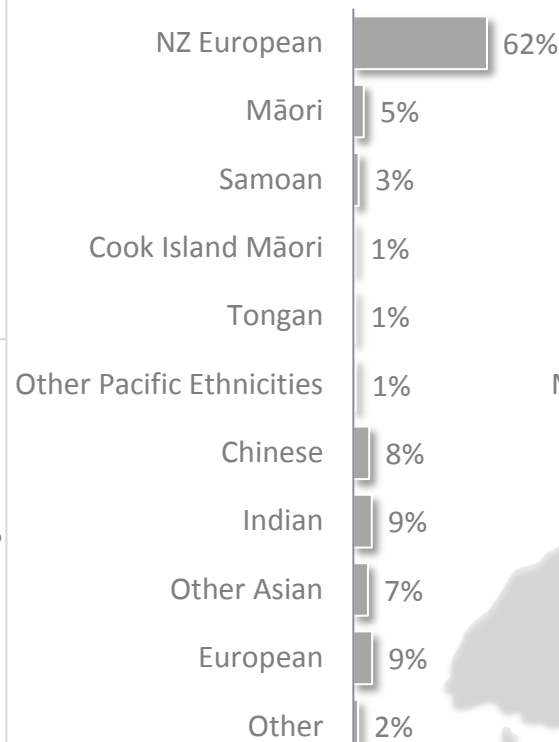
Employment



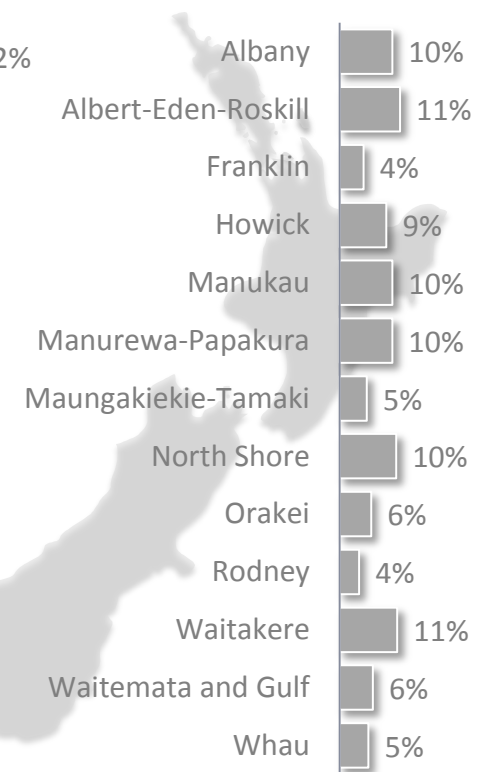
Household



Ethnicity



Ward

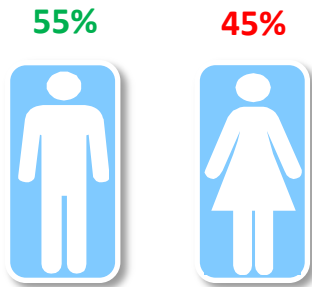


Random sample (n=1,250); Weighted by age nested with gender and Auckland Council ward areas

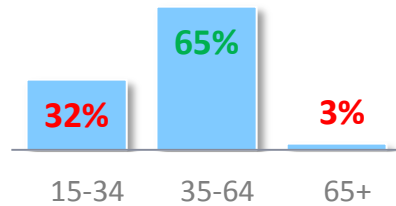
Sample profile: Cycling enthusiasts

Recruited to online survey via links placed on various specialist cycling websites by Auckland Transport

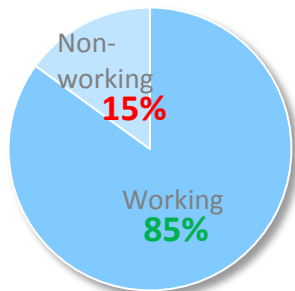
Gender



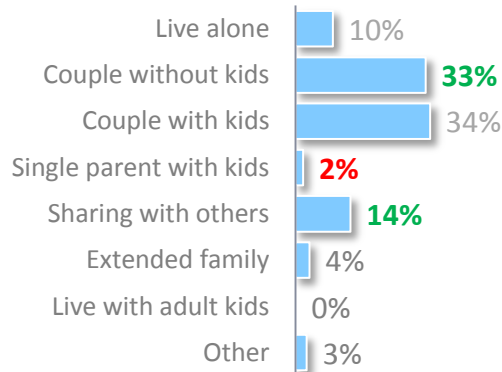
Age



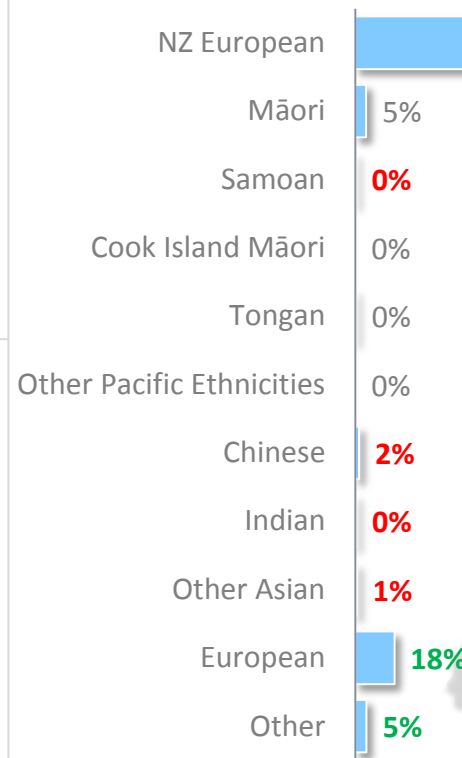
Employment



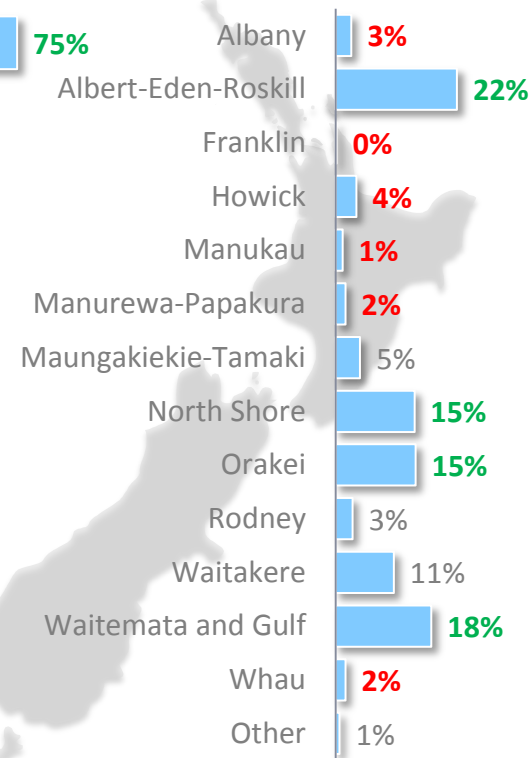
Household



Ethnicity



Ward



Cycling enthusiasts (n=448); Not weighted

Significantly higher than general public sample in **green**
Significantly lower than general public sample in **red**

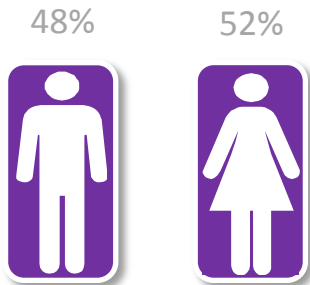
Cycling enthusiasts are more likely to be European, working, male, childless and in high income Wards.



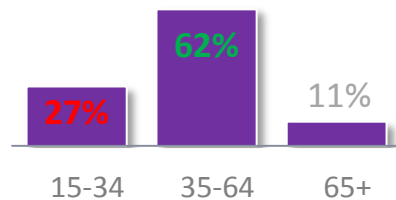
Sample profile: Walking enthusiasts

Recruited to online survey via links placed on various specialist walking websites by Auckland Transport

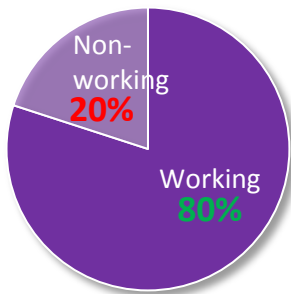
Gender



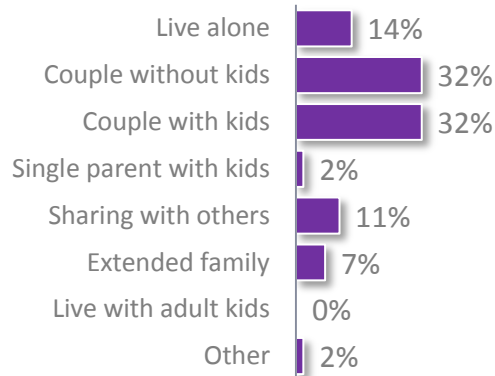
Age



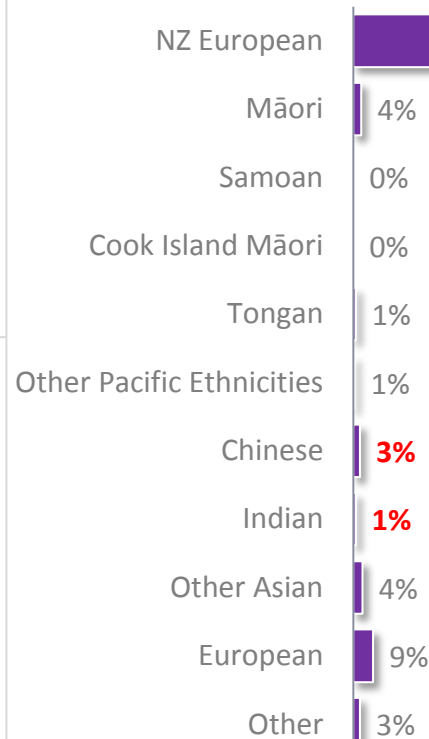
Employment



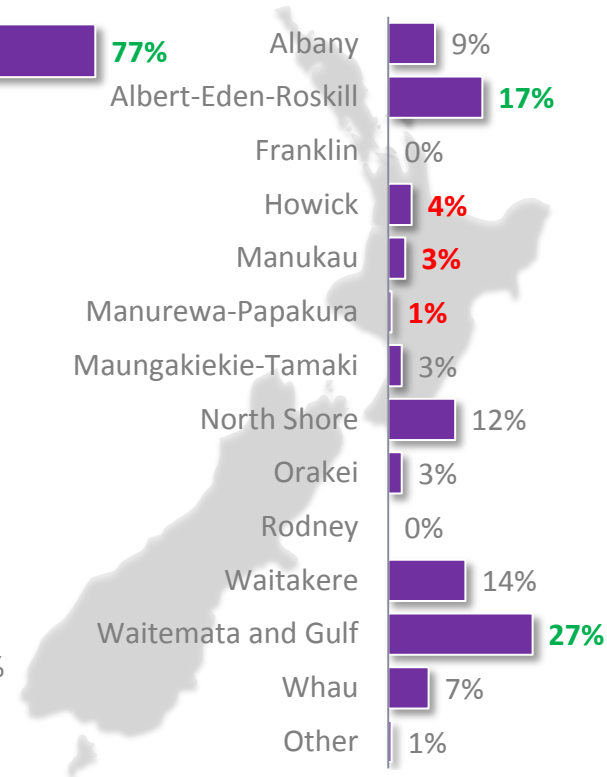
Household



Ethnicity



Ward



Walking enthusiasts (n=162); Not weighted

Significantly higher than general public sample in **green**

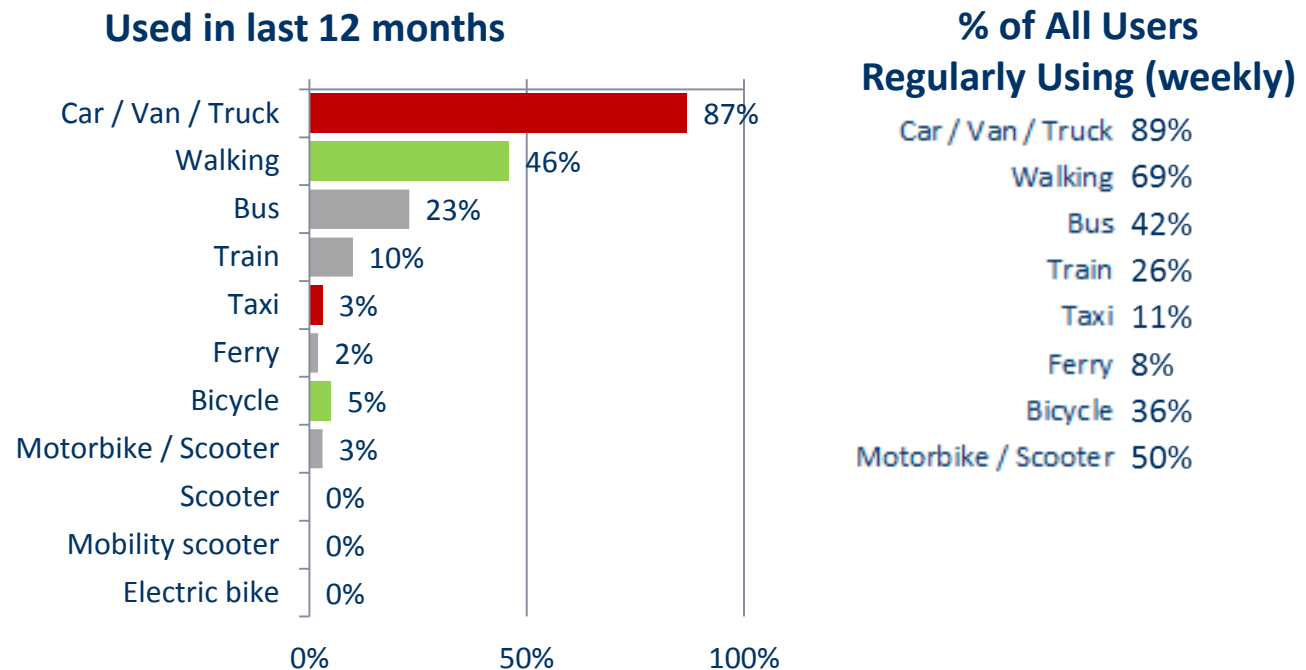
Significantly lower than general public sample in **red**

Overview:

1. What is the profile of cycling and walking behaviour in Auckland?



Within the Auckland general public almost half regularly walk, with one in 20 regularly cycling. Regular cyclists are more likely to be male



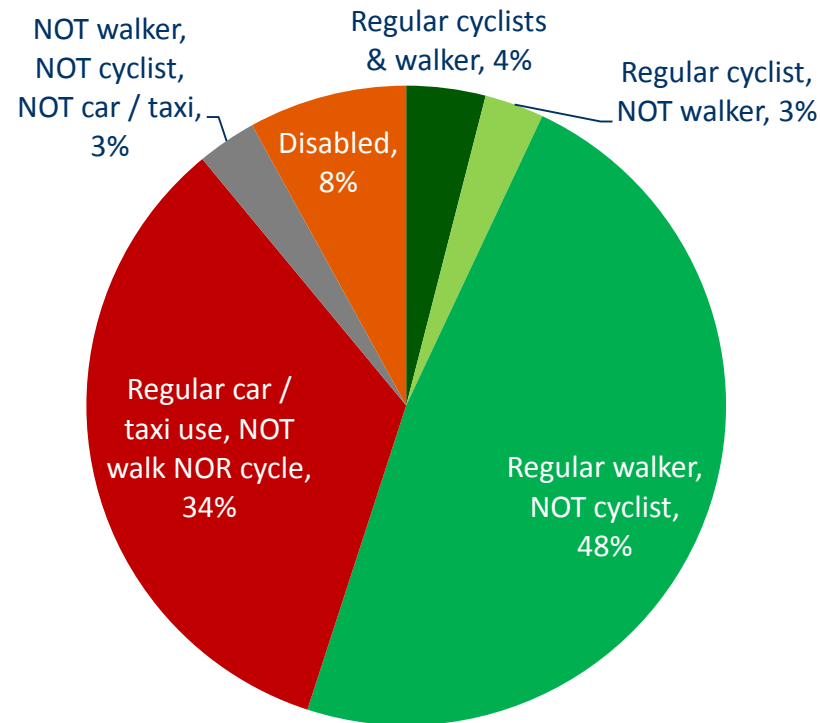
Q2.1a Which of the following have you used in Auckland in the past 12 months (for any reason, including work, sport or recreation)?

Q2.1b And which of the following do you regularly use, e.g. once a week (when weather and circumstances permit)? This can be for any reason, including work, sport or recreation.

Base: Random sample (n=1,250)

Some 55% of the general public walk and / or cycle regularly, whereas 34% use a car and / or taxi, not walking or cycling at all (& are not disabled)

Profile of cycling & walking behaviour in Auckland



Base: Random sample (n=1,250)



Q7.1 Thinking about these walks of ten minutes or more, which of these statements best applies to you? (rebased to total population).

*Regular walkers: walk for 10 minutes plus, as part of a specific journey to a chosen destination (codes 7, 8 or 9).

Q2.4 About how often do you use a **bicycle for any reason**? (rebased to total population) * Regular cyclists use a bike at least once a week;

Q2.1b And which of the following do you **regularly** use, e.g. once a week (when weather and circumstances permit)?

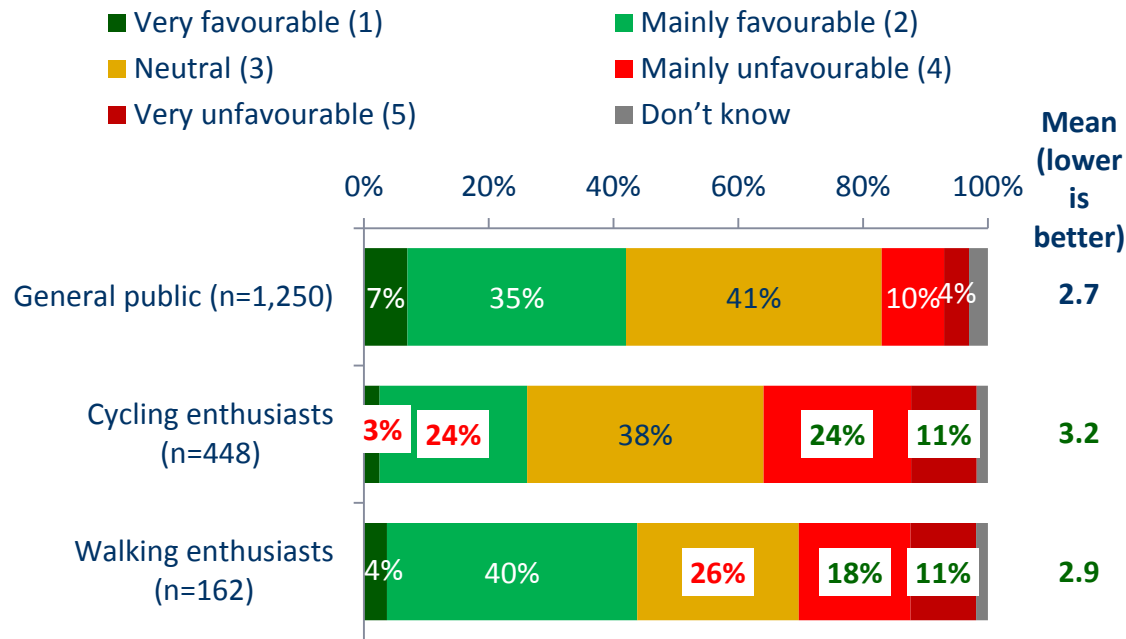
Overview:

2. What are current impressions of AT?



Most Aucklanders (83%) have a favourable or neutral view of AT. Cycling & walking enthusiasts are less favourable

Opinion of Auckland Transport



Significantly higher than general public sample in **green**

Significantly lower than general public sample in **red**



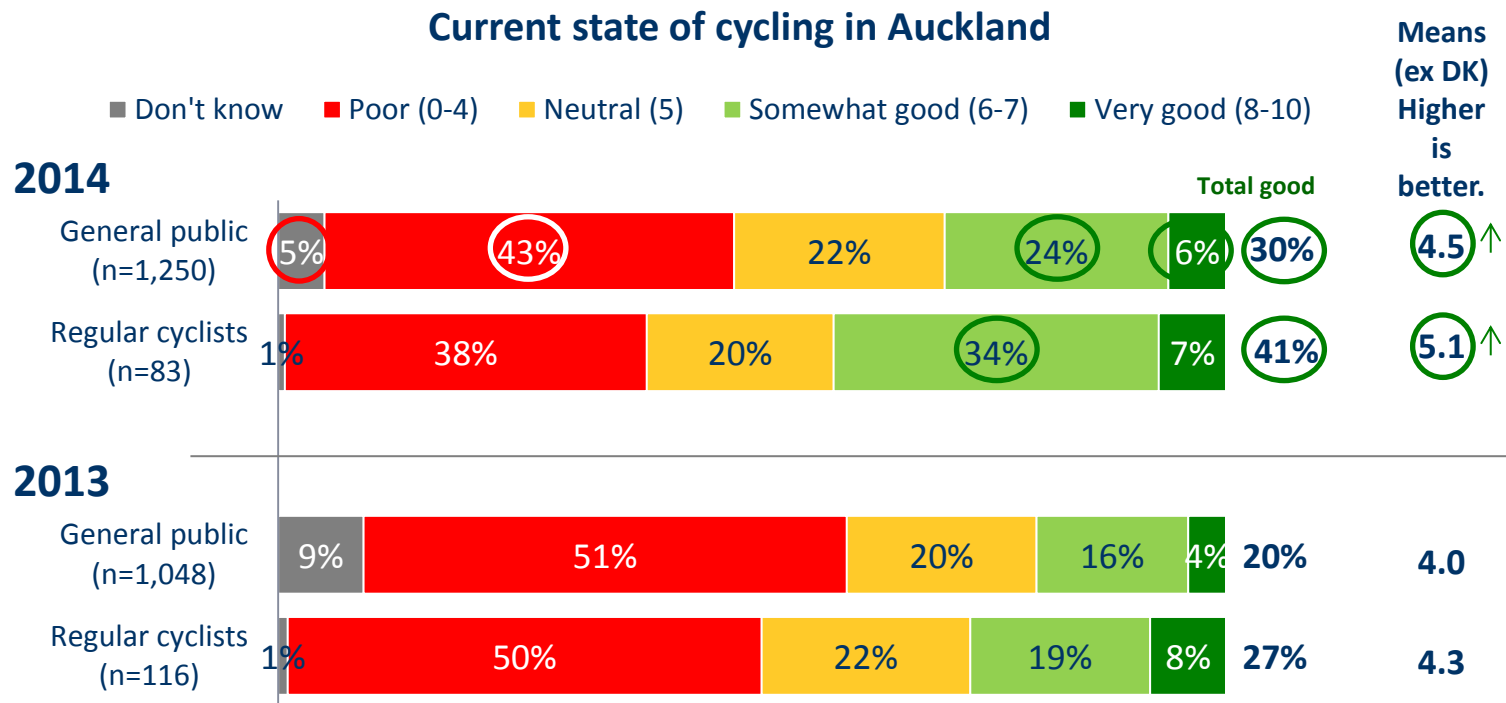
Q8 Considering all you know about or have heard of them, how favourable or unfavourable is our overall opinion or impression of Auckland Transport?

Cycling:

1. Have there been any improvements in perceptions?



Perceptions of the current state of cycling in Auckland have improved, especially amongst regular cyclists



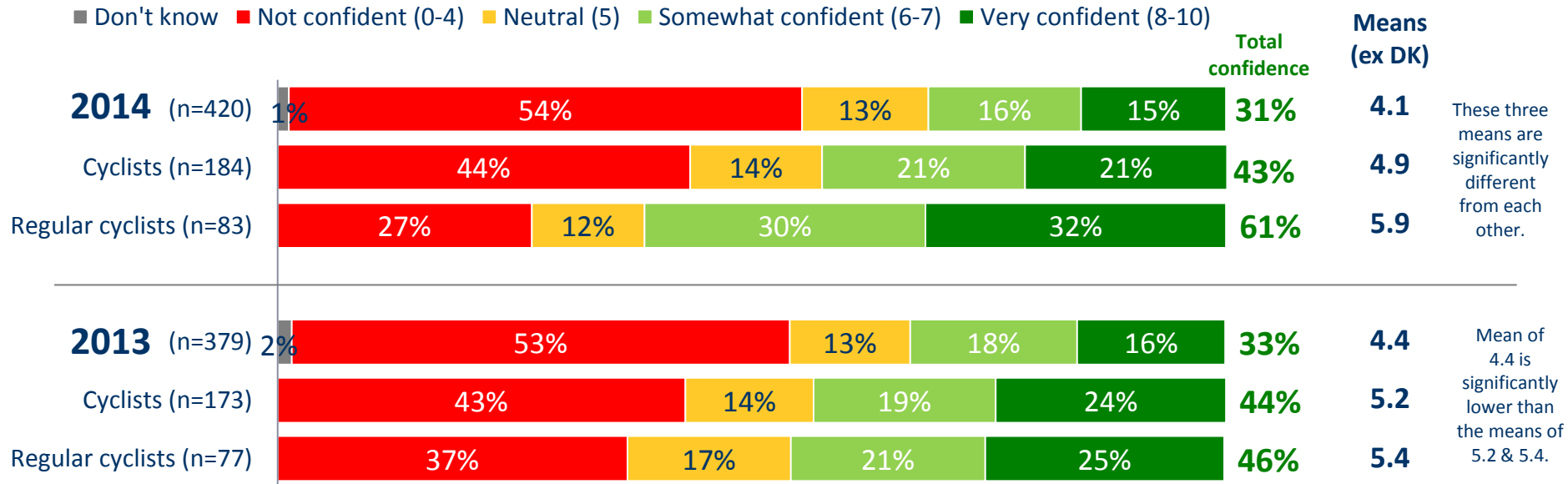
Regular cyclists: cycle at least once a week.

Significantly higher than 2013 in **green circles**
Significantly lower than 2013 in **red / white circles**

Q4.16 Overall, how do you view the current state of cycling in Auckland? (Please give us your opinion even if you don't cycle yourself.)

But... while regular cyclists are enjoying greater confidence, less regular & non-cyclists think their confidence would be worse. This indicates they are less aware of recent infrastructure improvements than the regular riders.

Confidence riding a bicycle in Auckland (of all those who 'could' use a bike to get somewhere regularly)



Cyclists: cycle at least a few times a year.
Regular cyclists: cycle at least once a week.

No significant differences between 2013 and 2014.

Q2.2a In general, how confident are you / would you be in riding a bicycle in the Auckland area?

Q2.2b Please select the reasons why you would not be confident riding a bicycle in the Auckland area?

Base: Those for which it is possible to use a bicycle as an option to get to somewhere regularly (Q2.3b = 1 or 2 or 3). 2014 data excludes those with disabilities and 2013 data assumes that those with disabilities are excluded at Q2.3b.

Cycling:

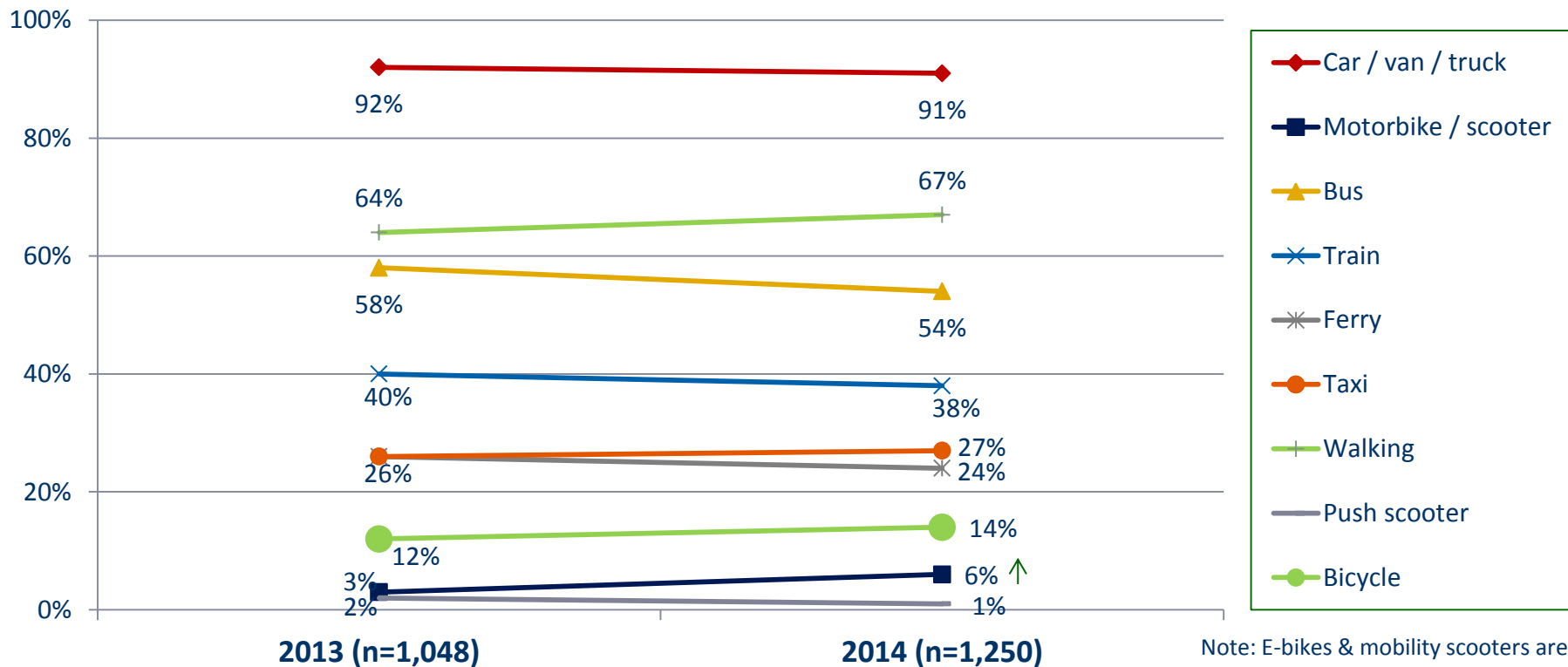
2. Have there been any improvements in behaviour?



* Able market defined as those who could cycle somewhere regularly (whether they do at present or not).

No significant changes in cycling (or walking) as a travel mode between 2013 & 2014 (based on use in last 12 months*)

Used in past 12 months



Note: E-bikes & mobility scooters are not included in the chart, as they were not included in 2013.

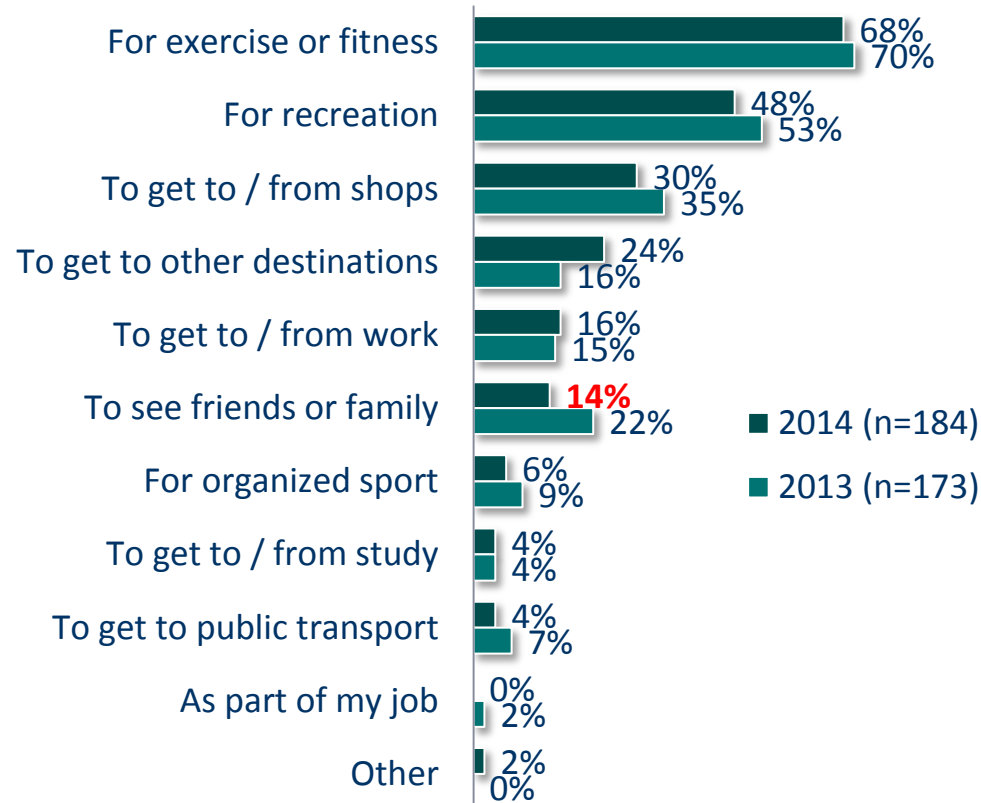


Q2.1a Which of the following have you used in Auckland in the past 12 months (for any reason, including work, sport or recreation)?

* **Note: Q2.1b** (regular use) can not be compared to 2013 as the question wording changed.

Exercise & recreation are still the main reasons for riding a bicycle. Fewer are cycling to see friends or family in 2014.

Reasons for riding a bicycle



Significantly higher in **green**
Significantly lower in **red**



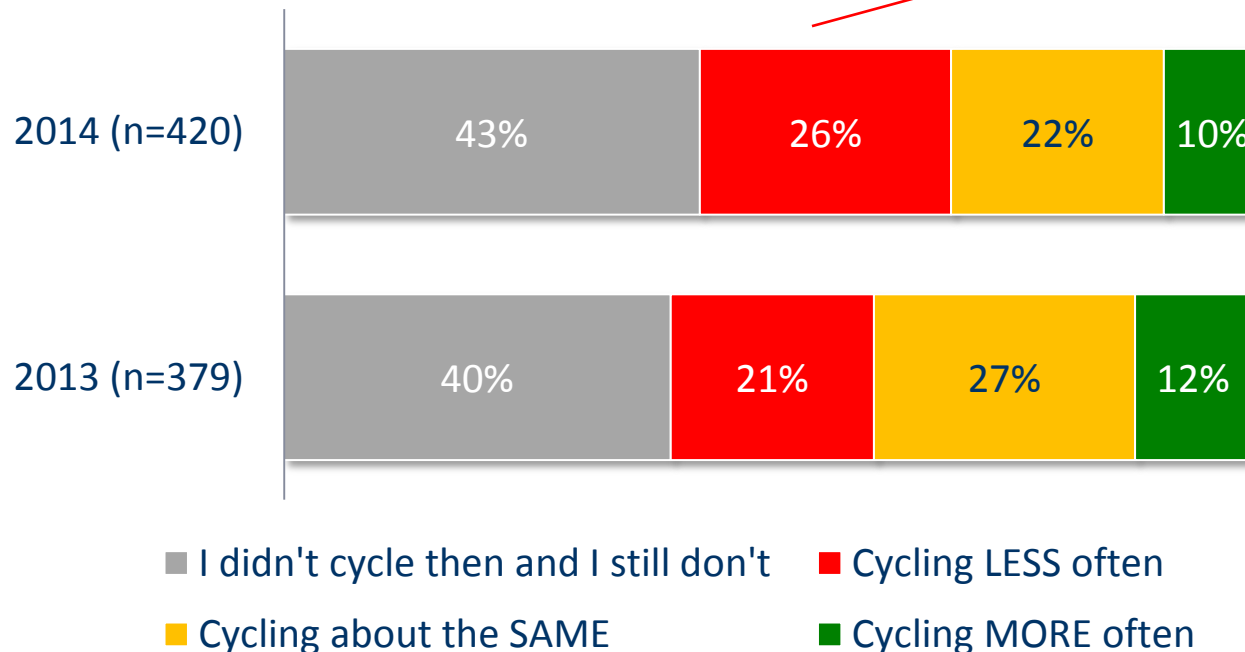
Q2.5 For which of the following reasons do you ride a bicycle? (Please select all that apply) (RANDOMIZE OPTIONS)

Q2.6 If you weren't travelling by bicycle, what form of transport would you be most likely to use instead?

Base: Those who use a bicycle at least a few times a year (Q2.4=1-6)

Of those who could cycle somewhere regularly, 1 in 4 state they are cycling less than they were a year ago – but this is NOT a significant change from 2013.

Stated change in cycling frequency



Main reasons for cycling less often are (n=98):

- Too busy / less time (43%);
- Roads have become too busy / dangerous (36%);
- Dangerous, unsafe or had a bad experience with traffic (33%).

Q2.8 Would you say that you are cycling more often, less often or about the same amount as you were a year ago?

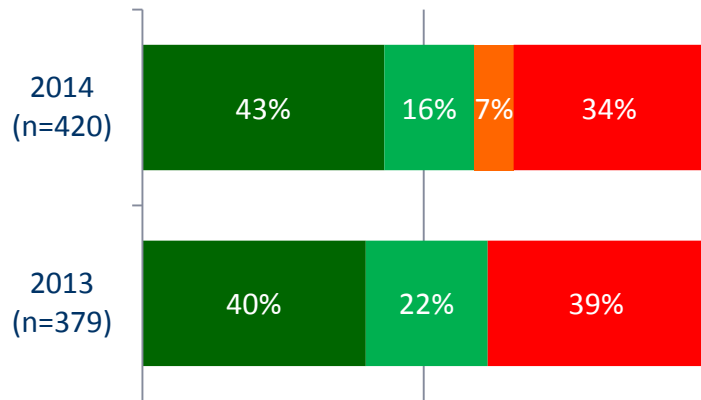
Q2.8a&b Please tell us the main reasons you are cycling more / less than you did before.

Base: Those for which it is possible to use a bicycle as an option to get to somewhere regularly (Q2.3b = 1 or 2 or 3). 2014 data excludes those with disabilities and 2013 data assumes that those with disabilities are excluded at Q2.3b.

Most who could cycle regularly have access to a bike. Of those with access to a bike, cycling frequency has fallen.

Access to a bike

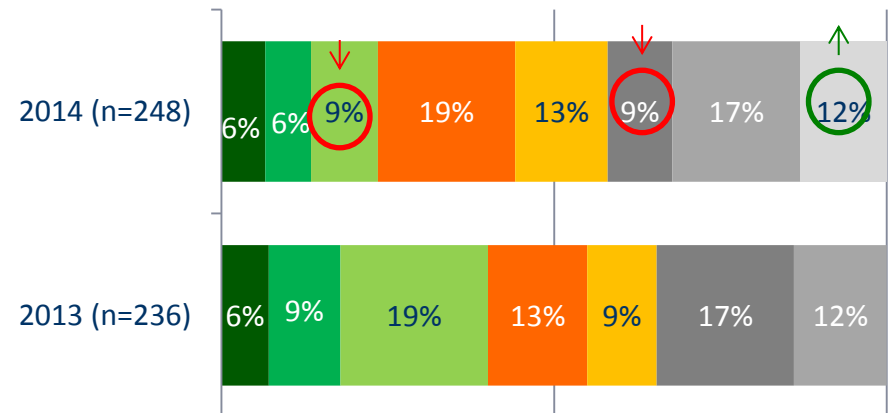
- Own a bike
- Easily borrow / hire
- Have bike, not working*
- No bike access



Of those who have a bike

Frequency of bike use (for any reason)

- 5 or more days a week
- Once or twice a week
- Less than once a month
- Once a year or so
- 3-4 days a week
- Once or twice a month
- A few times a year
- Less often than once a year



Significantly higher than 2013 in **green circles**
Significantly lower than 2013 in **red circles**

Q2.3 Do you own or otherwise have access to a bicycle?

ASK IF Q2.3 = YES (CODES 1 OR 2) I.E. HAVE ACCESS TO A BICYCLE. **Q2.4** About how often do you use a **bicycle for any reason**?

Base: Those for which it is possible to use a bicycle as an option to get to somewhere regularly (Q2.3b = 1 or 2 or 3). 2014 data excludes those with disabilities and 2013 data assumes that those with disabilities are excluded at Q2.3b.

Of those who could cycle somewhere regularly, a greater proportion are expecting to cycle less often, *including regular cyclists*

Expected cycling frequency in the coming year

■ I don't cycle now and I still won't ■ Will cycle LESS ■ Will cycle about the SAME ■ Will cycle MORE

2014 (n=420)



Regular cyclists (n=83)



2013 (n=379)



Regular cyclists (n=77)



Main reasons for cycling **less** often are (n=33):

- are the roads are becoming too busy / dangerous (42%);
- too busy / less time (35%).

Cyclists: cycle at least a few times a year.

Regular cyclists: cycle at least once a week.

Q2.9 Do you think in the coming year that you will cycle more often, less often or about the same amount as you do now?

Q2.10a&b Please tell us the main reasons you expect to cycle more / less than you did before.

Base: Those for which it is possible to use a bicycle as an option to get to somewhere regularly (Q2.3b = 1 or 2 or 3). 2014 data excludes those with disabilities and 2013 data assumes that those with disabilities are excluded at Q2.3b.

Cycling:
3. How does the
market segment
based on
propensity to cycle?





Segmentation is based on “best fit” agreement with one of the following statements:

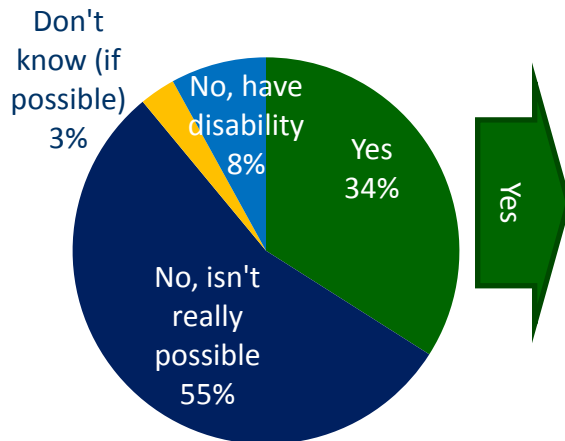
Pre-primed	I don't want to or would not consider doing this
	I have never thought about doing this
	I have given it some thought but I am not going to do it
Primed	I am thinking about doing this
	I have decided to do this (you have just decided but not yet started to do anything about it)
	I was doing this but didn't stick to it
Preparation	I am setting things in place and / or are seeking more information about this
Change	I have started doing this but am finding it difficult
	I have started doing this and am finding it easy
Normalised	I am already doing this and will continue to do so



Q3.4 And thinking about **cycling in Auckland**, which of these statements best applies to you?

Of those who could cycle to get somewhere regularly, 26% are 'primed' or in 'preparation' for cycling

General public:
Ability to use bicycle for regular journey (n=1,250)



Normalised cyclists are not 'extremists' and have a good opinion of Auckland cycling

Pre-primed 60%	
I don't want to or would not consider doing this	26%
I have never thought about doing this	12%
I have given it some thought but I am not going to do it	22%
Primed 22%	
I am thinking about doing this	16%
I have decided to do this (you have just decided but not yet started to do anything about it)	2%
I was doing this but didn't stick to it	4%
Preparation 4%	
I am setting things in place and / or are seeking more information about this	4%
Change 7%	
I have started doing this regularly but am finding it difficult	4%
I have started doing this regularly and am finding it easy	3%
Normalised 7%	
I am already doing this regularly and will continue to do so	7%

S8 Do you have any disability or impairment that affects your ability to move?

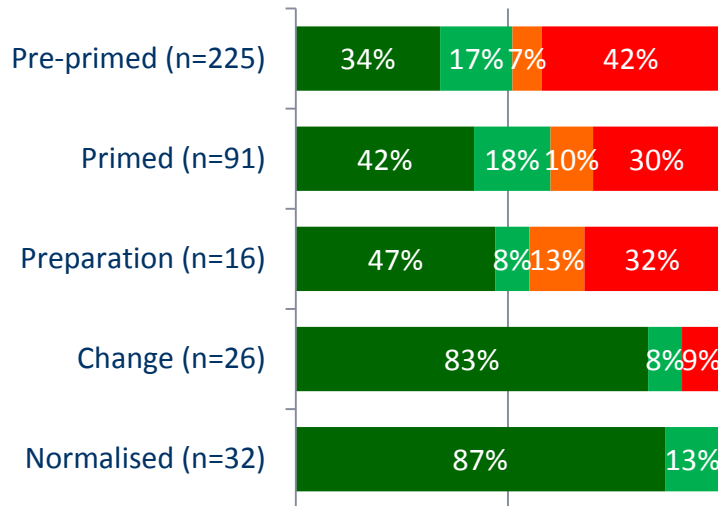
Q2.3b Is it possible for you to use a bicycle as an option to get to work or school (or somewhere else you regularly go)?

Q3.4 Thinking about **cycling in Auckland**, which of these statements best applies to you? (By 'regularly' we mean 'at least once a week when weather and circumstances permit'.)

Most in the Pre-Primed, Primed & Preparation segments have access to a bike; & of those who do, they ride at least occasionally

Access to a bike

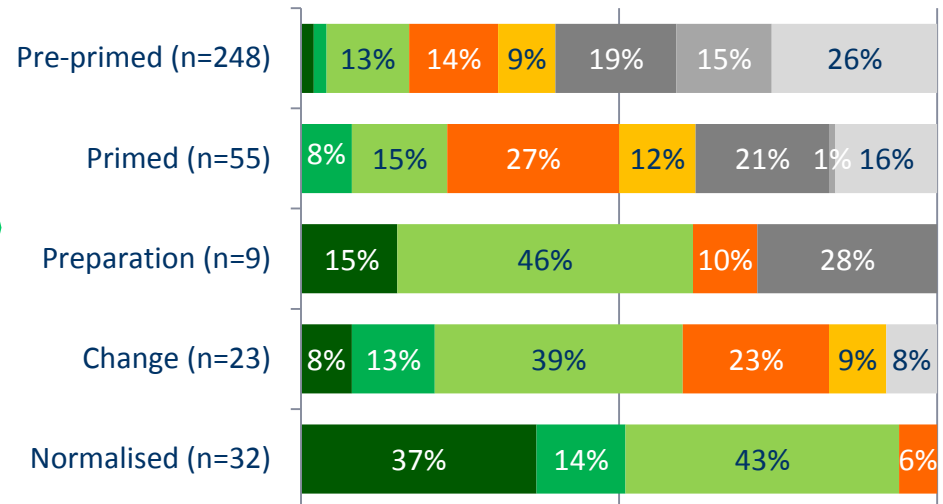
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Of those who have a bike

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- A few times a year
- Once a year or so
- Less often than once a year



Q2.3 Do you own or otherwise have access to a bicycle?

ASK IF Q2.3 = YES (CODES 1 OR 2) I.E. HAVE ACCESS TO A BICYCLE. **Q2.4** About how often do you use a bicycle for any reason?

Cycling:

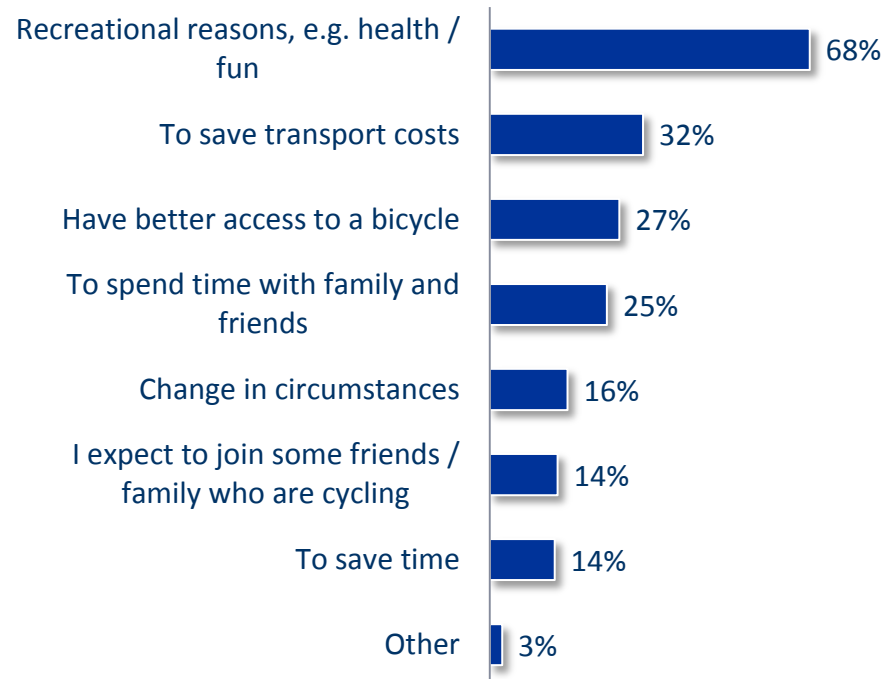
4. How can we **increase** cycling as an active transport mode?

Primed &
Preparation
segments
(open)

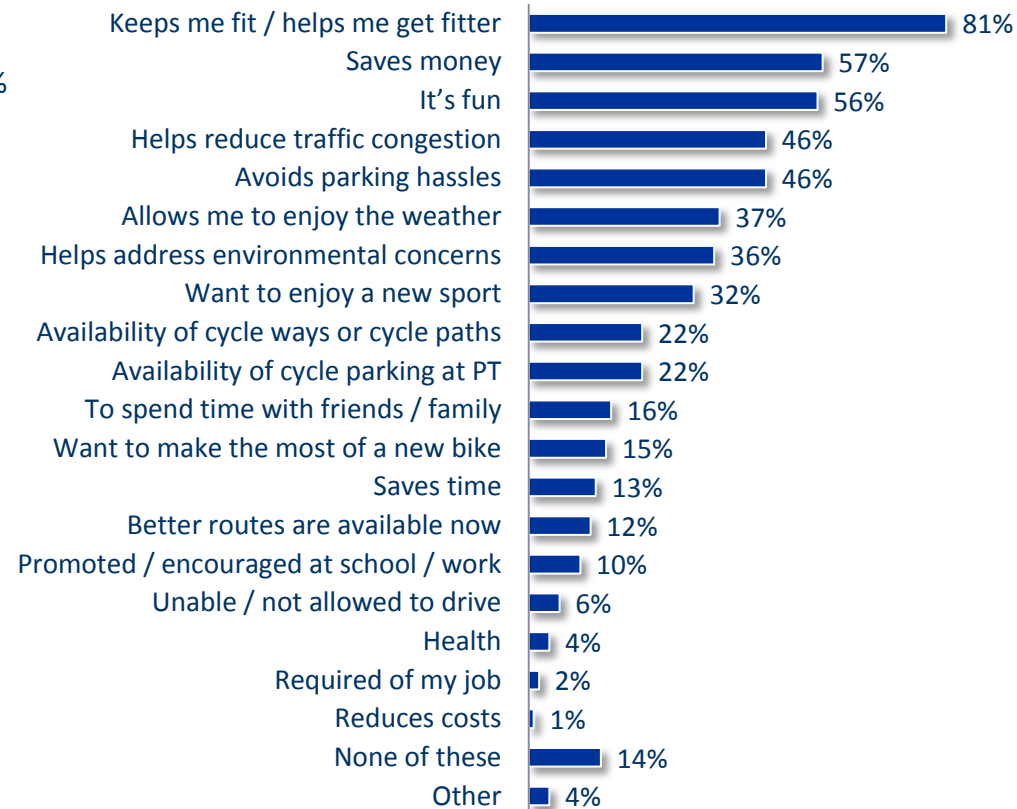


The Primed & Preparation segments are primarily **motivated** by health, fun & saving money – focus on these attributes to encourage participation

Reasons expect to cycle more often (n=52)



Reasons for cycling (n=93*)



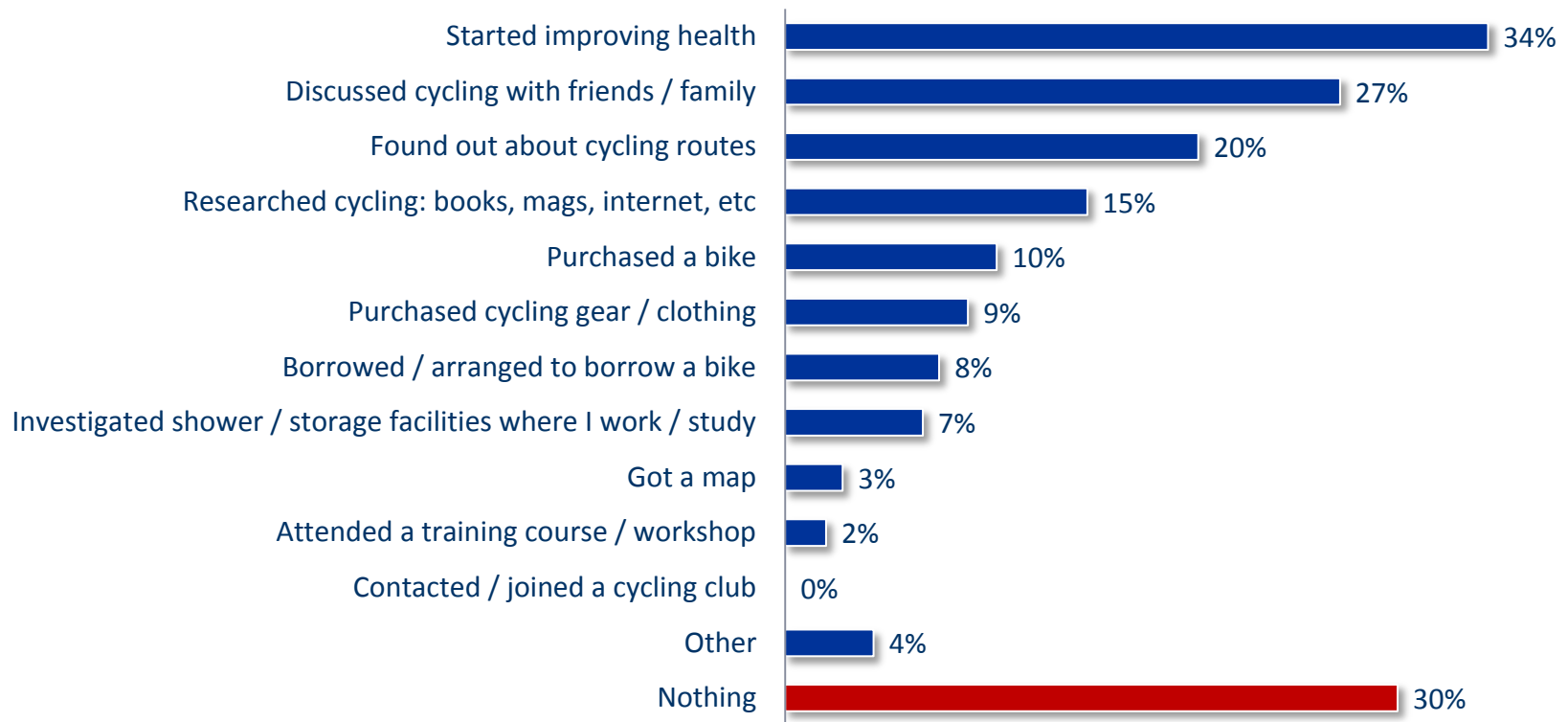
Q2.10a [Asked of those who 'will cycle more often than I do now'] Please tell us the main reasons you expect to cycle more than you did before.

Q3.6a&b Which reason(s) contributes to you cycling or thinking about cycling more often?

*Primed segment & Preparation segment (n=107) *Excludes 'I was doing regularly but didn't stick to it' part of Primed segment*

Help **motivate** the Primed & Preparation segments by providing information on how to get fit, family-friendly riding & cycling routes

Steps taken towards cycling more (n=93*)



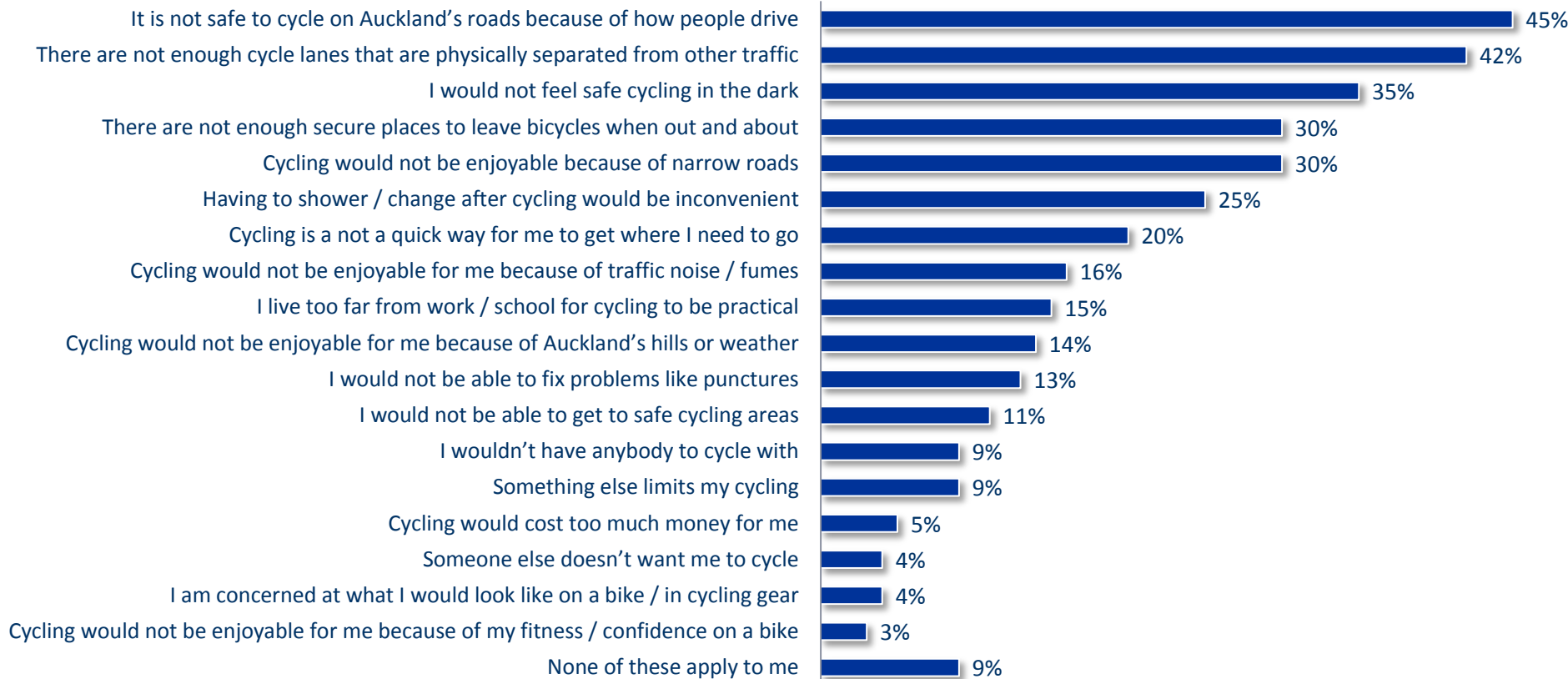
Q3.5 What practical steps have you taken towards cycling more?

Primed segment & Preparation segment (n=107)

* Excludes 'I was doing regularly but didn't stick to it' part of Primed segment

The Primed & Preparation segments are **deterred** from cycling by safety concerns from sharing the road with drivers

Reasons for not cycling (n=107)

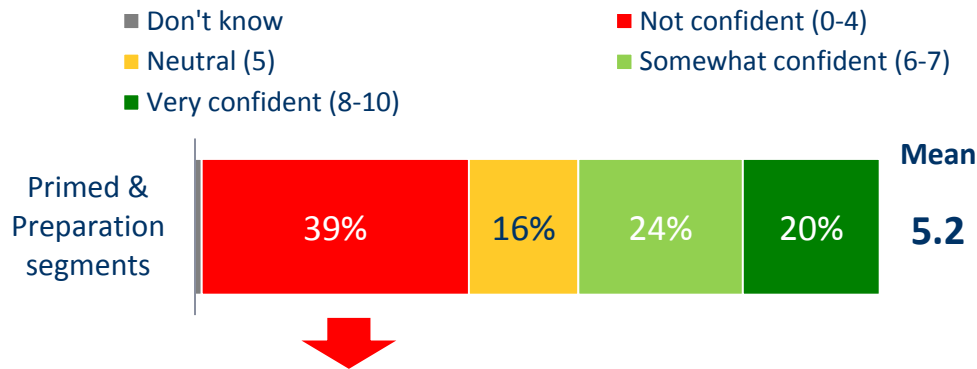


Q3.8a Sometimes people tell us there are things that stop them cycling. When it comes to cycling in Auckland, which of these statements applies to you, if any?

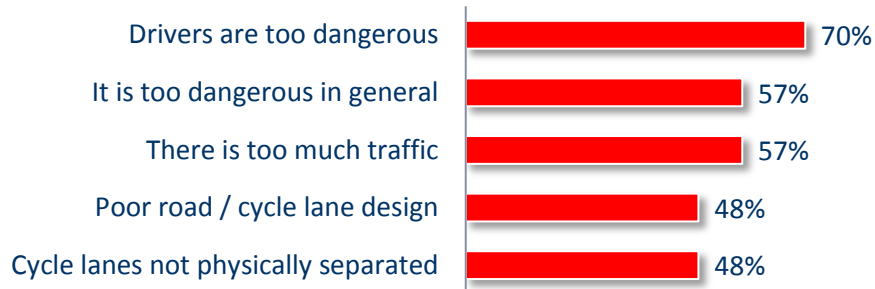
Q2.8b [Of those who are 'cycling less often than I did a year ago'] Please tell us the main reasons you are cycling less than you did before.
Primed segment & Preparation segment (n=107)

2 in 5 in the Primed & Preparation segments are 'not confident' about riding in Auckland – the large majority believe **more should be done** to promote safer cycling-driving and **more cycle infrastructure** should be built

Confidence riding a bicycle in Auckland (n=107)



Reasons for 'not confident' (n=41)



Issues with facilities / infrastructure (n=26)

More should be done to promote safe cycling	95% agree
More should be done to promote safe driving around cyclists	72% agree
Investment in cycling facilities is good value for money	66% agree
There are enough cycle lanes and cycle paths in Auckland	66% disagree
Motorists are considerate of cyclists	63% disagree
Cyclists are sufficiently separated from traffic	60% disagree
Auckland has a well-connected cycle network	53% disagree
Cycle lanes in Auckland are of good quality	48% disagree
There are enough cycle storage facilities at PT stations	45% disagree
There is sufficient cycle storage at my place of work / study	28% disagree

*Agree (6-10 rating) & disagree (0-4 rating) on a 10-point scale.

Q2.2a In general, how confident are you / would you be in riding a bicycle in the Auckland area?

Q2.2b Please select the reasons why you would not be confident riding a bicycle in the Auckland area?

Q3.10 Asked of those who use the AT network and use bike at least a few times a year: How strongly do you agree or disagree with each of the following statements about cycling in Auckland? (0-10 scale) *Primed segment & Preparation segment (n=107)*

Cycling:

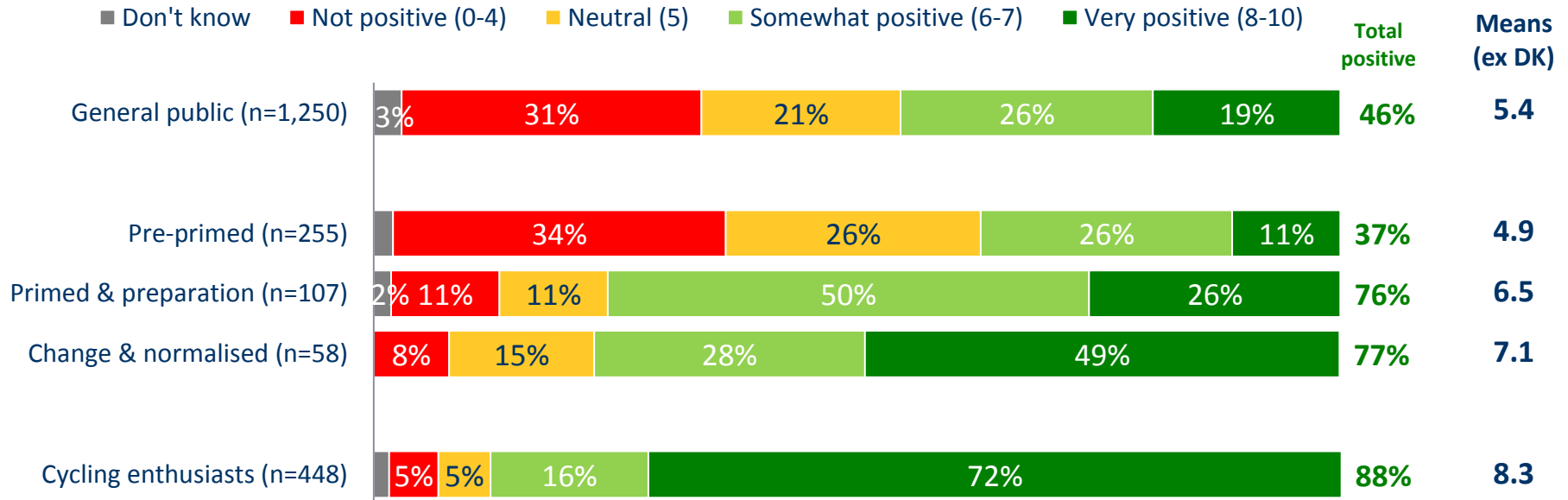
4. How can we **increase** cycling as an active transport mode?

Public
sentiment



3 in 10 Aucklanders feel negative towards cyclists. Those less involved in cycling are more negative towards cyclists

Feelings towards Auckland cyclists



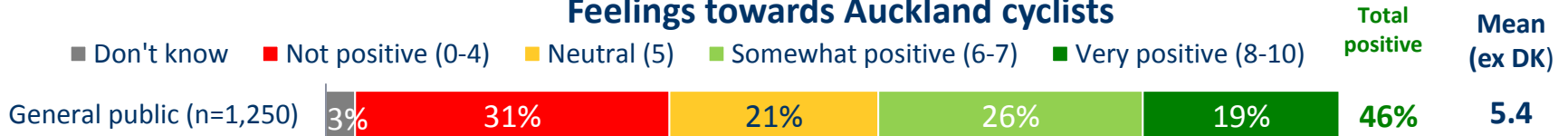
Significantly higher than general public sample in **green circles**
 Significantly lower than general public sample in **red circles**

Q11.2a What are your feelings when you think about the cyclists you see riding around Auckland?

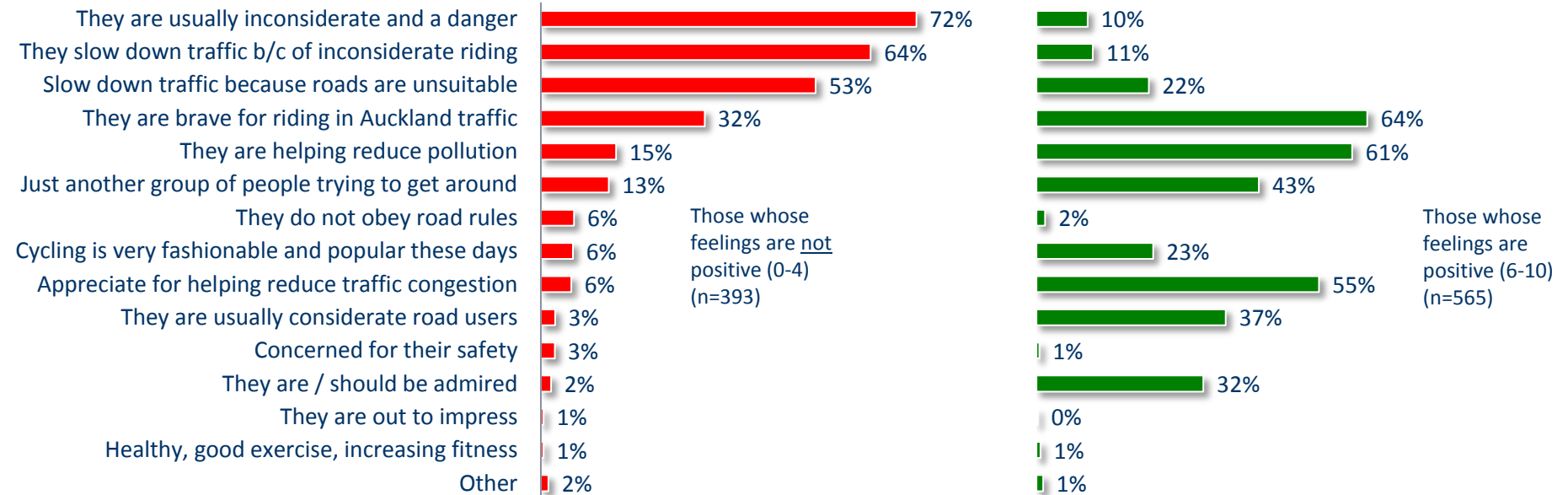


Those who feel negative about cyclists believe cyclists are inconsiderate, slow traffic down & are a danger to themselves & other road users*

Feelings towards Auckland cyclists

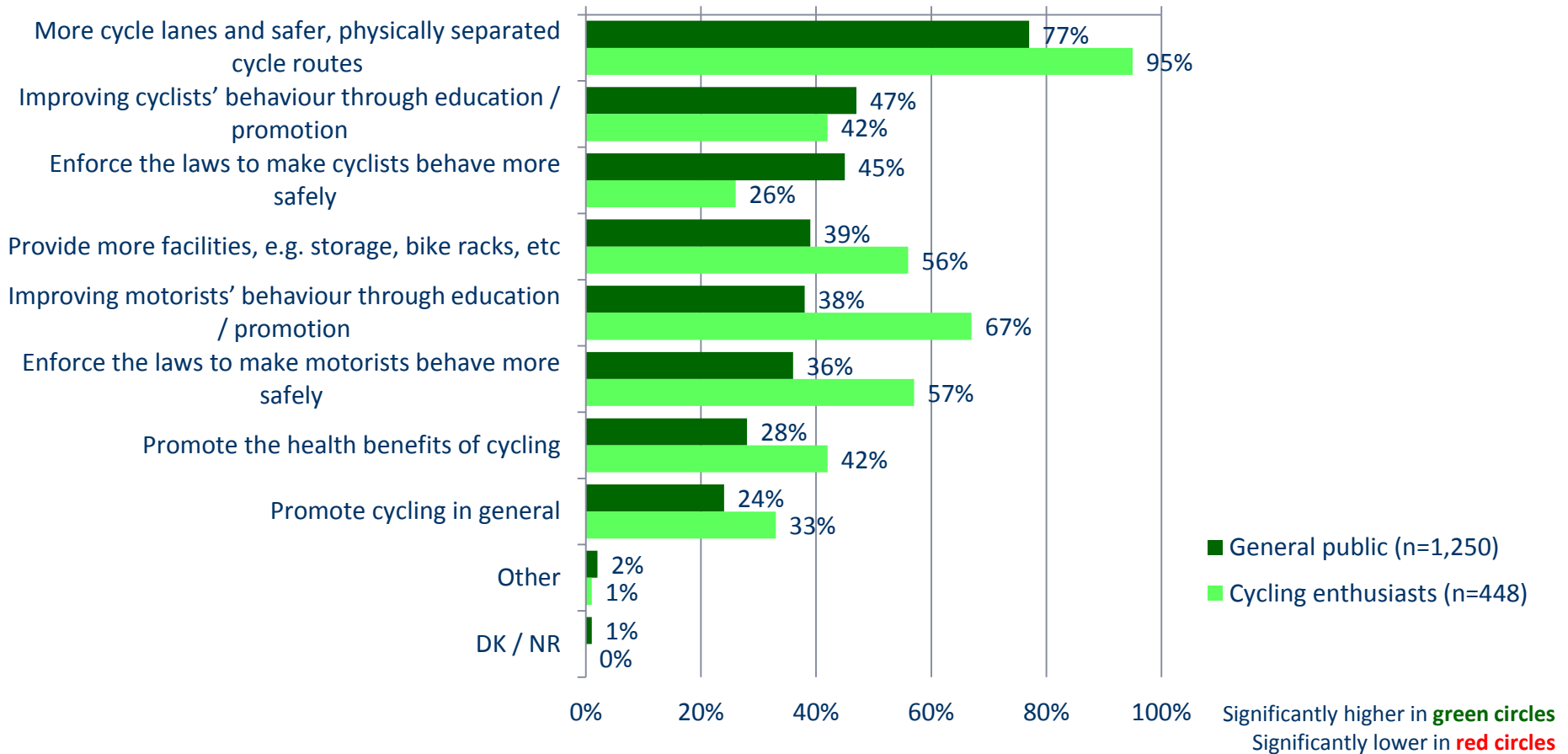


Main reasons feel this way



Q11.2b What are the main reasons why you feel this way about the cyclists you see riding around Auckland?

More / better cycle routes are seen as the biggest priority to get more Aucklanders cycling, by both the general public & cycling enthusiasts



Q3.11 What should be the biggest priorities in getting more Auckland residents cycling either for commuting or recreation?

Cycling:

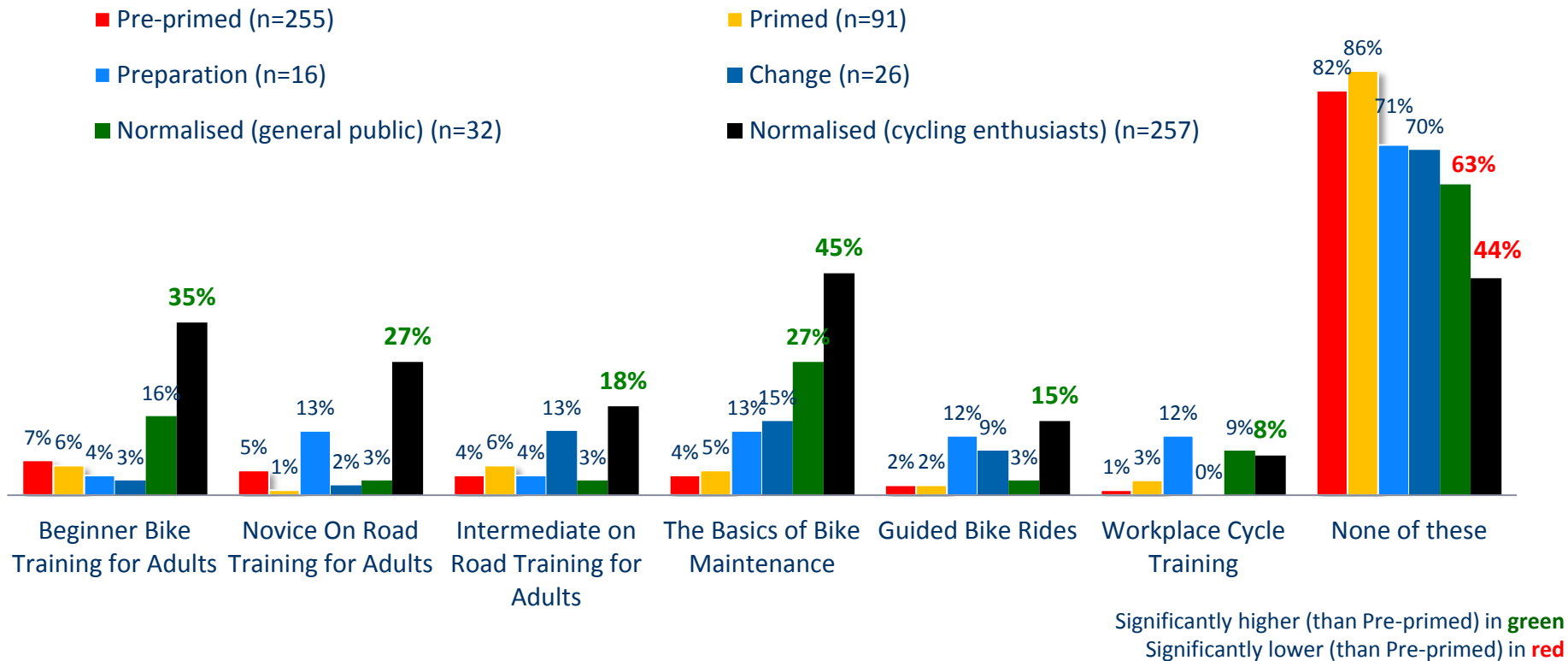
4. How can we **increase** cycling as an active transport mode?

AT training
awareness
and need



Normalised cyclists are significantly more likely to be aware of at least one training course, especially the Normalised cycling enthusiasts. Only 14% of Primed cyclists are aware of an Auckland Transport cycling course

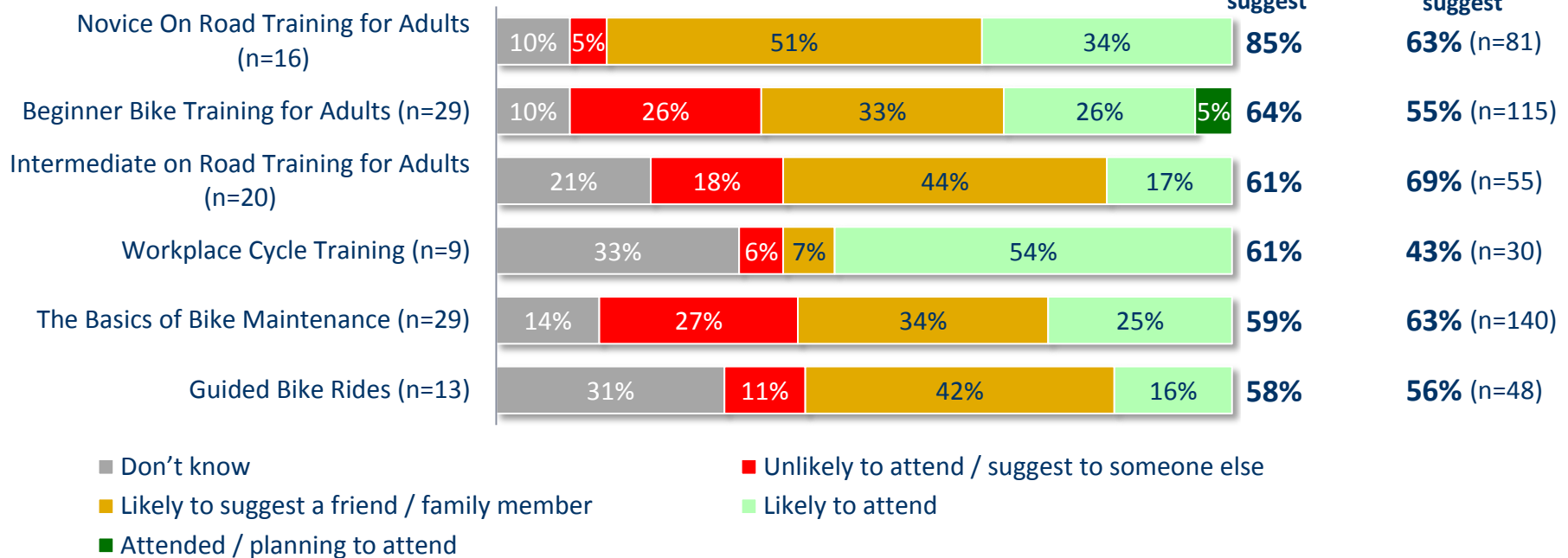
Awareness of training courses



Q5.5 Auckland Transport offers a number of cycling-related training courses. Which, if any, of the following have you heard of?
(Asked only of those who could cycle somewhere regularly)

The majority of 'able cyclists' would attend, or suggest, AT cycling training courses. The high interest in Workplace Training suggests that location is an issue.

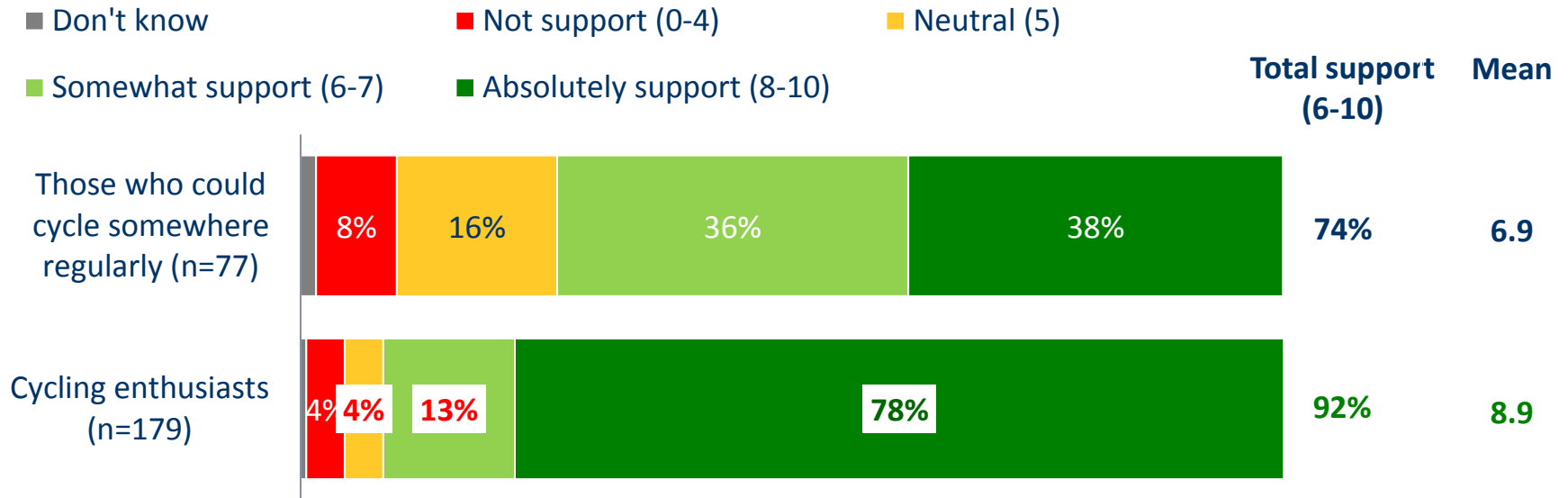
Likelihood of attending training courses (of those aware of each course)



Q5.6 How likely are you to attend these cycling training courses?
(Asked only of those who could cycle somewhere regularly and were aware of each course)

Strong support for Auckland Transport to fund cycling training courses

Support for training funding



Significantly higher in **green**
Significantly lower in **red**



Q5.6b Do you support Auckland Transport funding these sorts of training courses?
(Asked only of those who were aware of at least one Auckland Transport course at Q5.5)

Cycling:

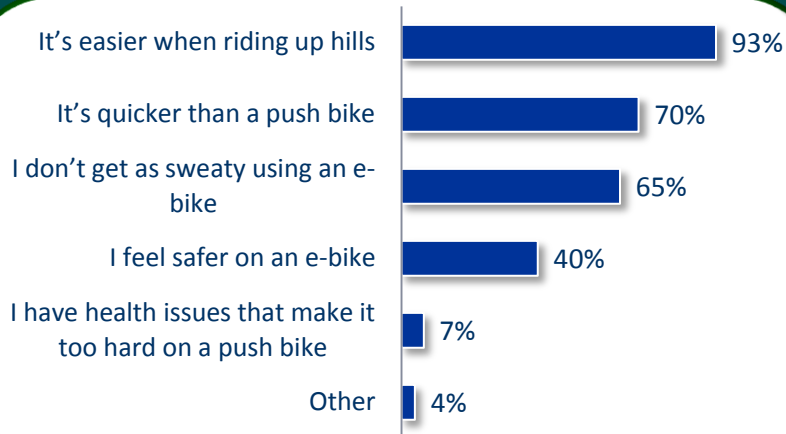
4. How can we **increase** e-cycling as an active transport mode?

Reactions to
e-bikes



Of those who could / do cycle regularly, half would consider cycling or cycling more if they had an e-bike

26 respondents* regularly use an e-bike, because:

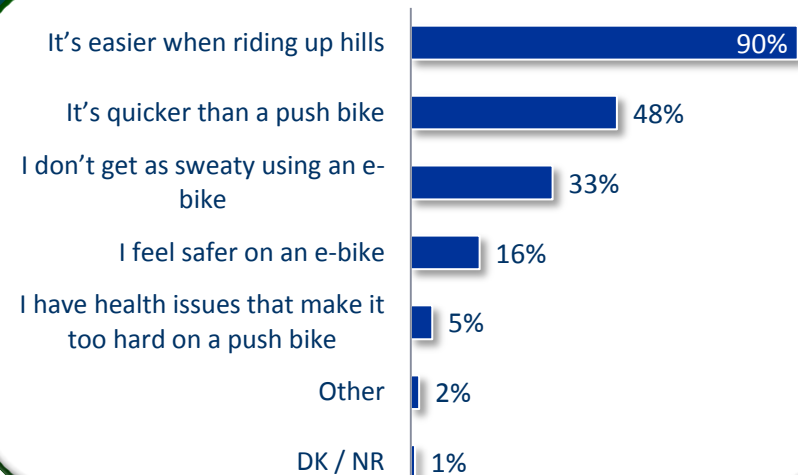


* 4 respondents were from the general public sample (0%) and 22 respondents from the enthusiasts sample.

Of those who don't regularly use an e-bike and would be able to use a bicycle for a regular journey (n=446):

48% have heard of an e-bike;

50% would consider cycling or cycling more often if they had an e-bike instead of a push bike, because:



Q6.6 You said that you use an e-bike. What are the reasons you use an e-bike over a push bike?

Q6.1 [Description of e-bike provided] Had you heard of an e-bike before reading the description above?

Q6.7 Would you consider cycling, or cycling more often, on an e-bike instead of a push bike? Q6.8 And why do you say that...?

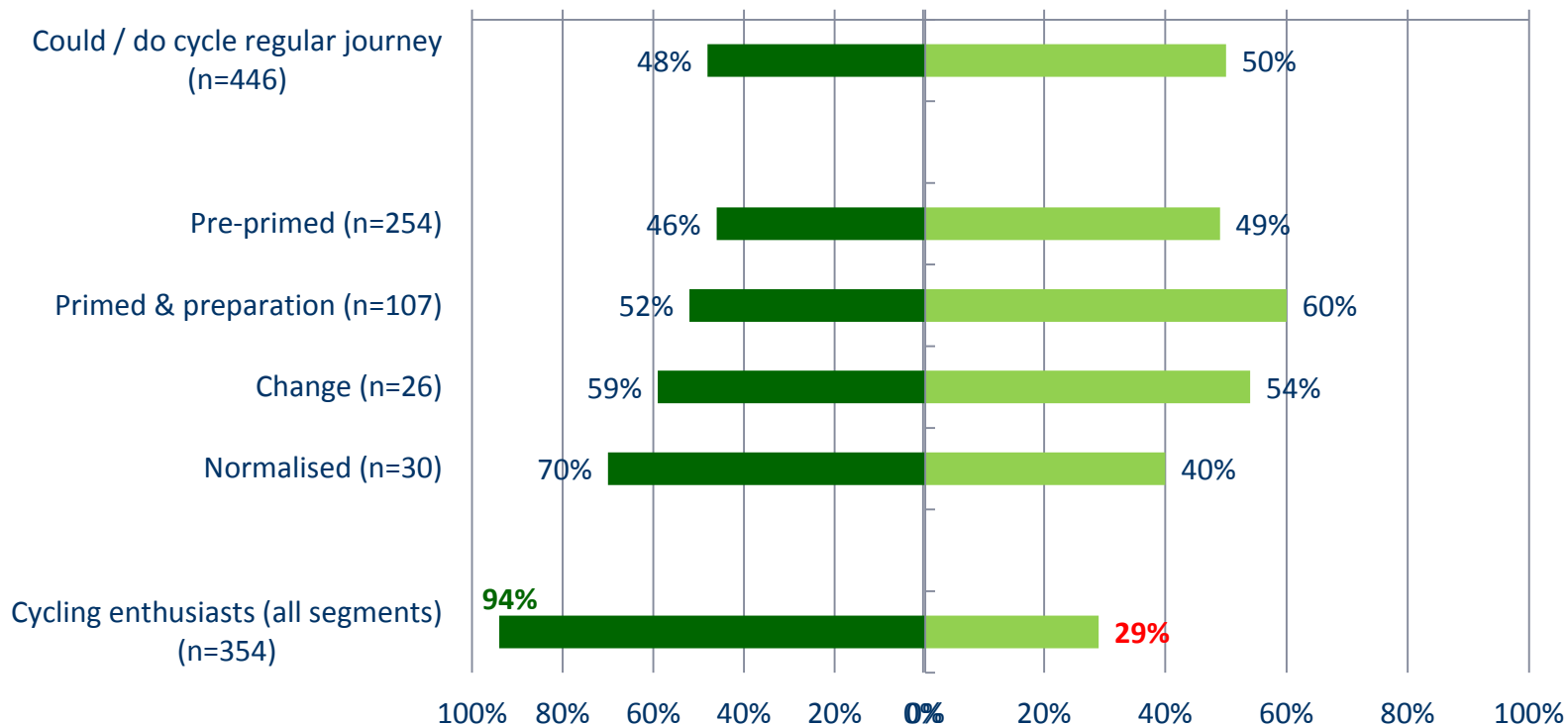
(Asked only of those who could cycle somewhere regularly)

Cycling enthusiasts are more likely to have heard of e-bikes, but less likely to consider using them. E-bikes' potential is in attracting non-cyclists to an easy non-car option.

Of those who don't use e-bike regularly...

Heard of an e-bike

Would consider cycling or cycling more often if had an e-bike



Q6.1 [Description of e-bike provided] Had you heard of an e-bike before reading the description above?

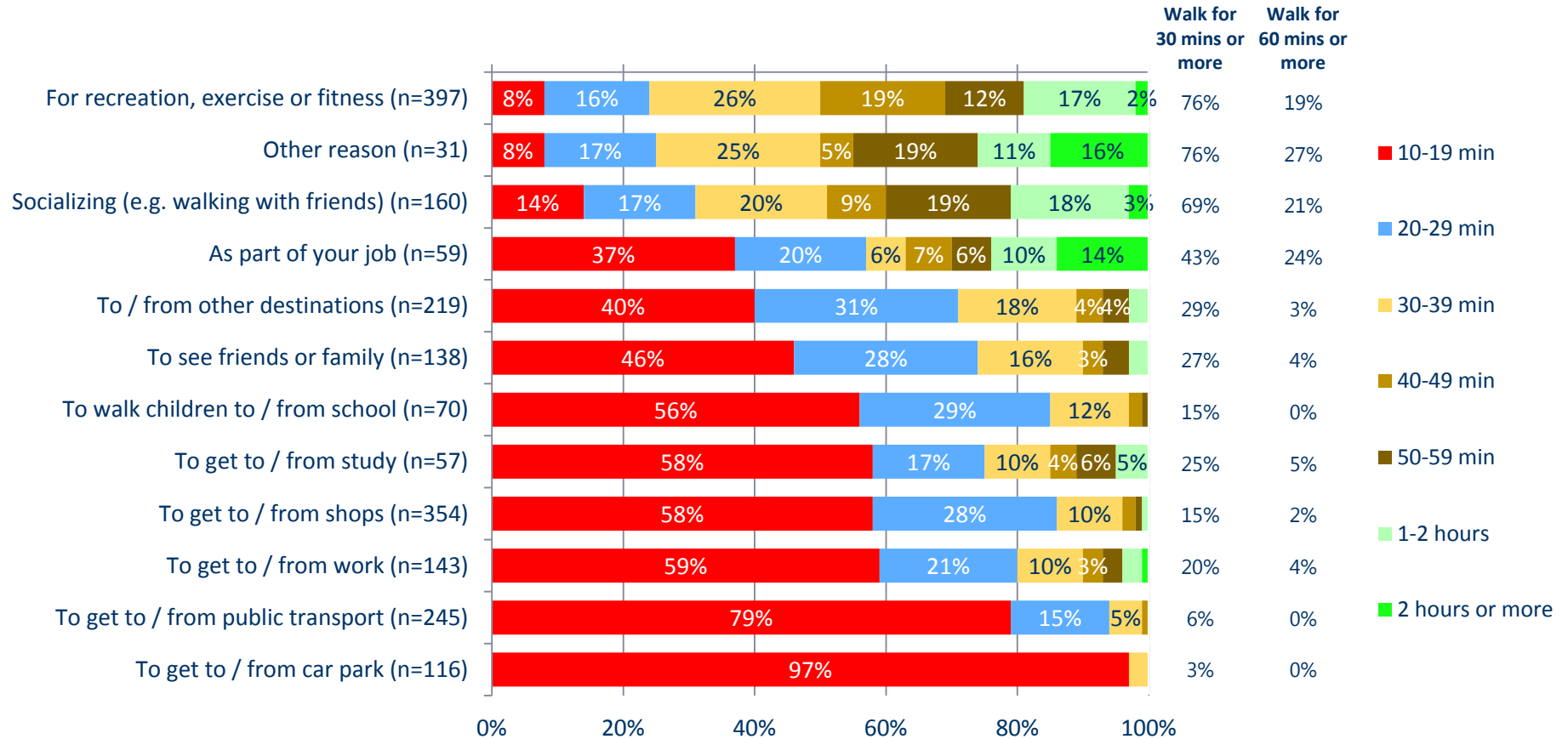
Q6.7 Would you consider cycling, or cycling more often, on an e-bike instead of a push bike? **Q6.8** And why do you say that...?
(Asked only of those who could cycle somewhere regularly)

Walking:

1. Current behaviour



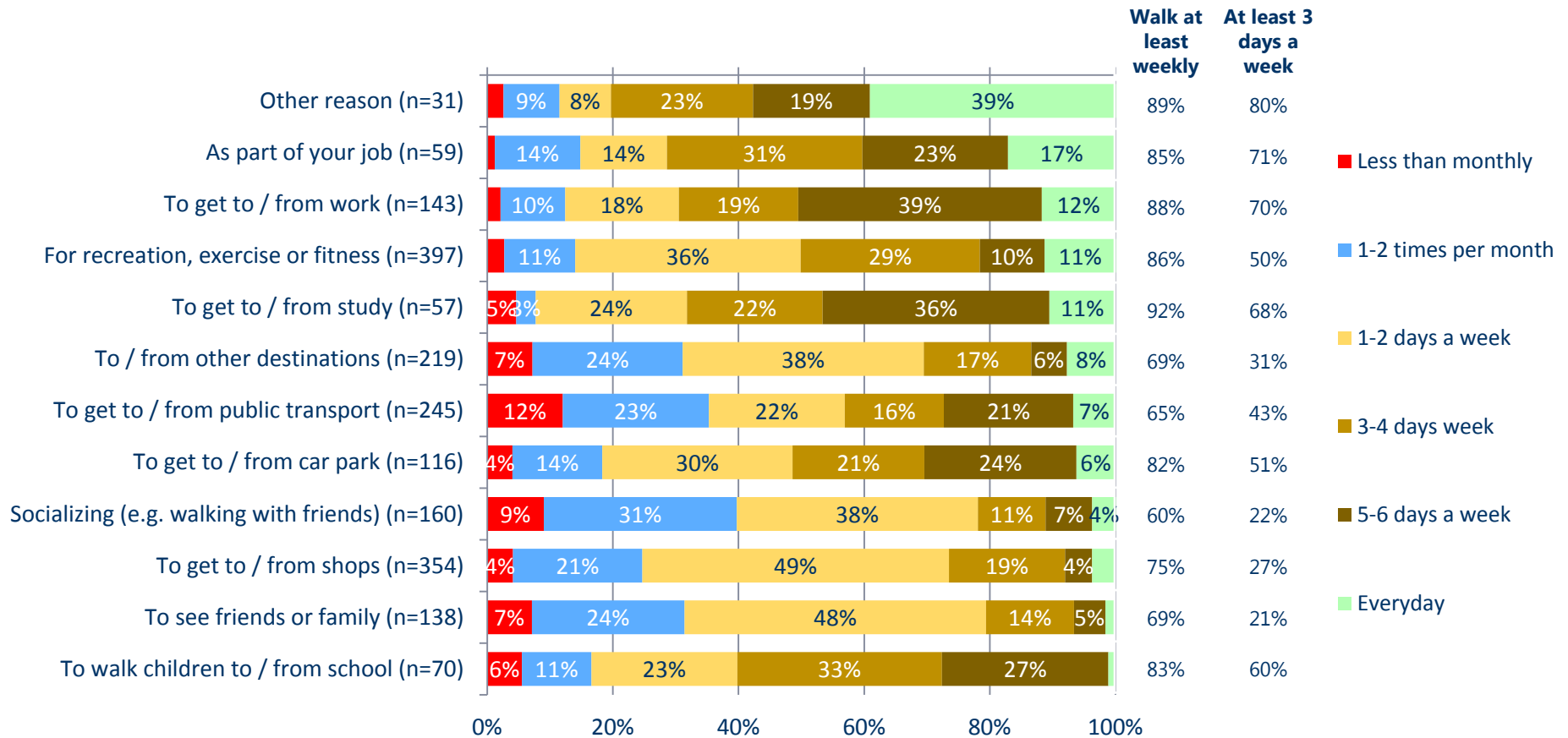
Most walks to specific destinations take under 20 mins to complete. People take longer walks for recreation / fitness



Asked of current walkers only who undertake the type of walk indicated in Q7.2

Q7.3 Next, can you please indicate, on average, how long the walks you do for each purpose take?

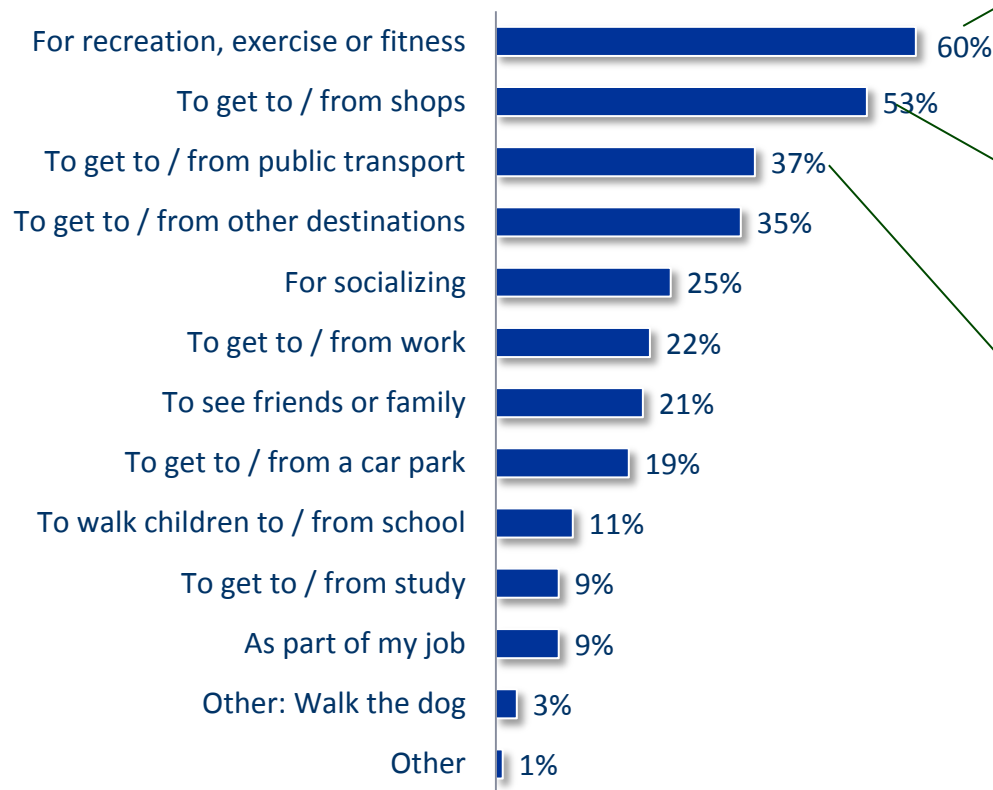
People walk more frequently if it is part of their job, to get to / from work, or for 'other' reasons (mostly walking the dog)



Asked of current walkers only who undertake the type of walk indicated in Q7.2
Q7.4 On average, how frequently do you do each of the types of walks that you do?

Motivators for walking are health & exercise & to get to / from shops, but also connected to lifestage & occupation

Reasons for walks



More likely to be a reason for:

- 65+ year olds (78%)
- North Aucklanders (70%)

More likely to be a reason for:

- Unemployed (85%)

More likely to be a reason for:

- 15-34 year olds (45%)
- Unemployed (67%)
- Students (58%)



Asked of current walkers only

Q7.2 For which of the following reasons do you have these walks? (walks of ten minutes or longer as part of a specific journey to a chosen destination)

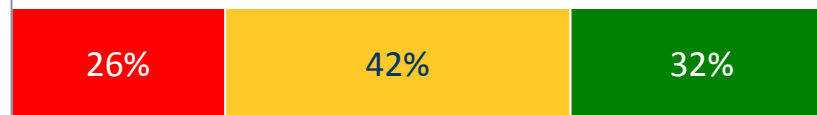
Normalised segment & Change segment (n=656)

Roughly one-third of the general public are walking more often compared to a year ago

Walking compared to one year ago

■ Less often ■ The same ■ More often

General public
(who are able)
(n=1,148)



More likely to be:

- Female (30% of females are walking less often)
- Clerical and administrative workers (37%)
- Single parents (37%)
- Pre-primed segment (33%)
- Primed segment (40%)



More likely to be:

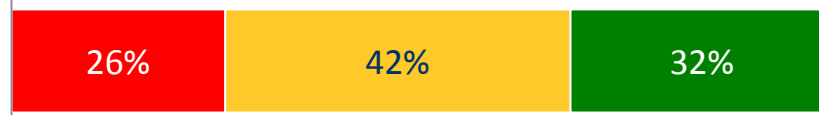
- Samoan (52% of Samoan people are walking more often) and other Pacific ethnicities (61%)
- Students (47%)
- Change segment (43%)
- Those who use the bus regularly (43%)

Health & exercise are the key **motivators** for those who are walking more. Time & motivation are the key **barriers**.

Walking compared to one year ago

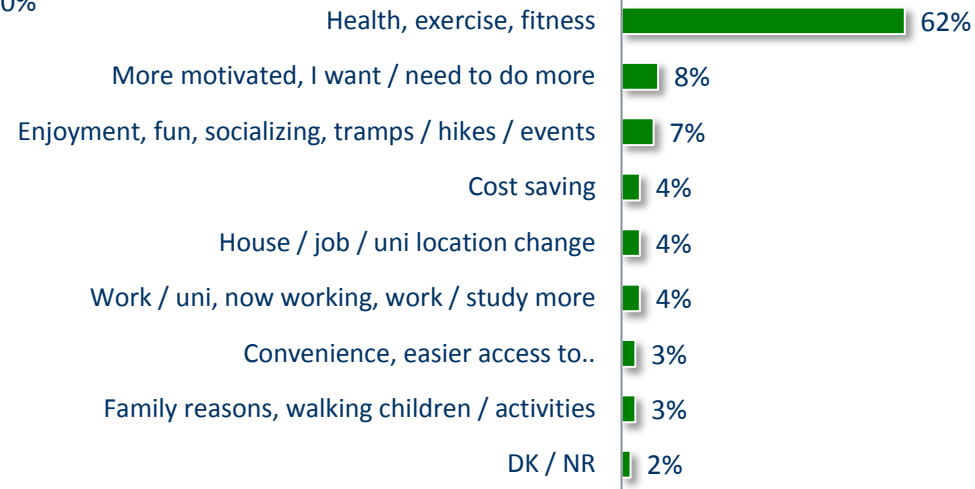
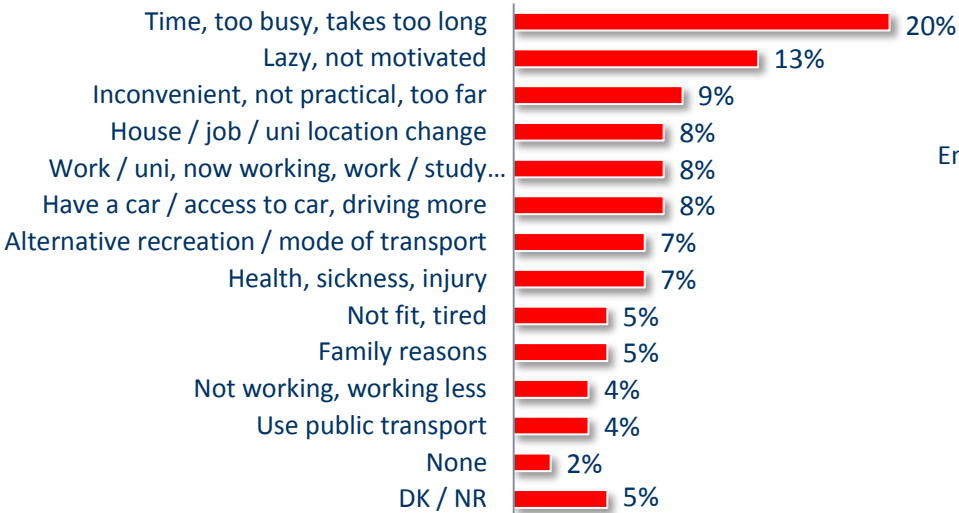
■ Less often ■ The same ■ More often

General public
(who are able)
(n=1,148)



Reasons for walking less often (n=96)

Reasons for walking more often (n=167)



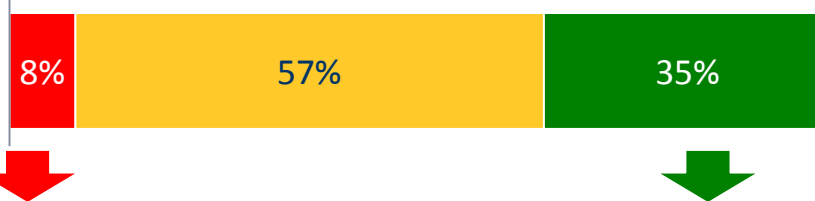
Q7.6b What are the reasons why you are walking more often than you were a year ago?
Q7.6c What are the reasons why you are walking less often than you were a year ago?

Roughly one-third of the general public expect to walk more often in the coming year

Expected walking in the coming year

■ Less often ■ The same ■ More often

General public
(who are able)
(n=1,148)



More likely to be:

- Male (11% of males expect to walk less often)
- 15-34 year olds (13%), students (14%) and those who currently catch the bus regularly (13%)

More likely to be:

- Māori (49% of Māori expect to walk more often) and Cook Island Māori (83%)
- Those whose occupation is 'home duties' (50%)
- Primed segment (52%)
- Those who use taxis regularly (54%)

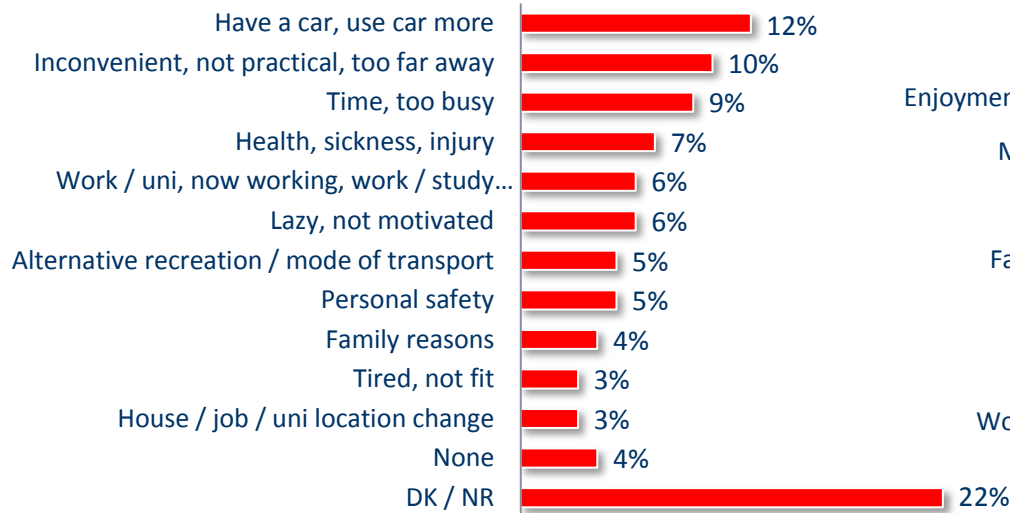
Health & exercise are the key **motivators** for those who expect to walk more. Car use, inconvenience & time are the key **barriers**.

Expected walking in the coming year

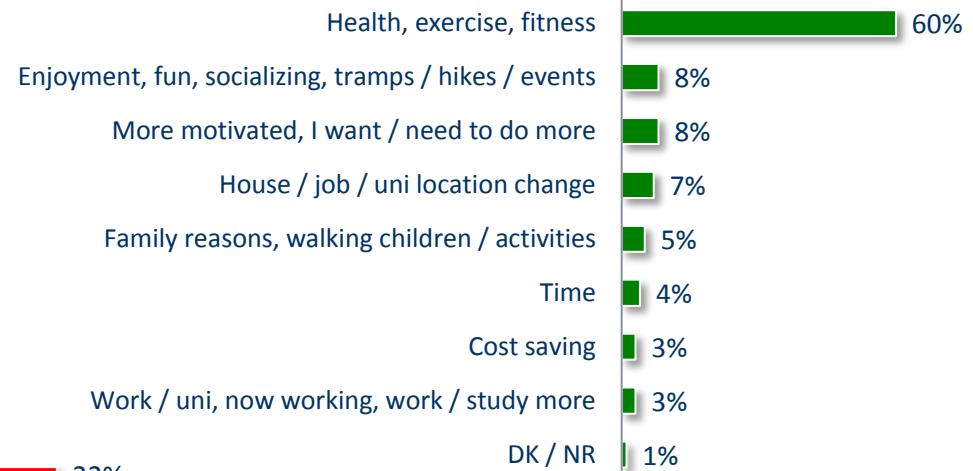
■ Less often ■ The same ■ More often



Reasons for walking less often (n=70)



Reasons for walking more often (n=408)



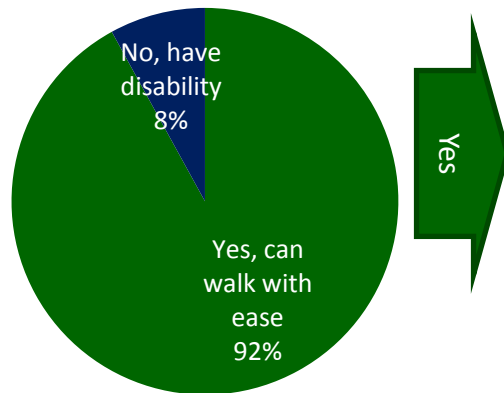
Q7.6b What are the reasons why you are walking more often than you were a year ago?
Q7.6c What are the reasons why you are walking less often than you were a year ago?

Walking:
2. How does the
market segment
based on
propensity?



Of those who are able, 19% are 'primed' for walking for 10 minutes or more as part of a specific journey to a chosen destination

Ability to walk with ease –
General public (n=1,250)



Pre-primed 24%	
I don't want to or would not consider doing this	10%
I have never thought about doing this	5%
I have given it some thought but I am not going to do it	9%
Primed 19%	
I am thinking about doing this	11%
I have decided to do this (you have just decided but not yet started to do anything about it)	2%
I was doing this but didn't stick to it	6%
Preparation 1%	
I am setting things in place and / or are seeking more information about this	1%
Change 12%	
I have started doing this regularly but am finding it difficult	5%
I have started doing this regularly and am finding it easy	7%
Normalised 44%	
I am already doing this regularly and will continue to do so	44%



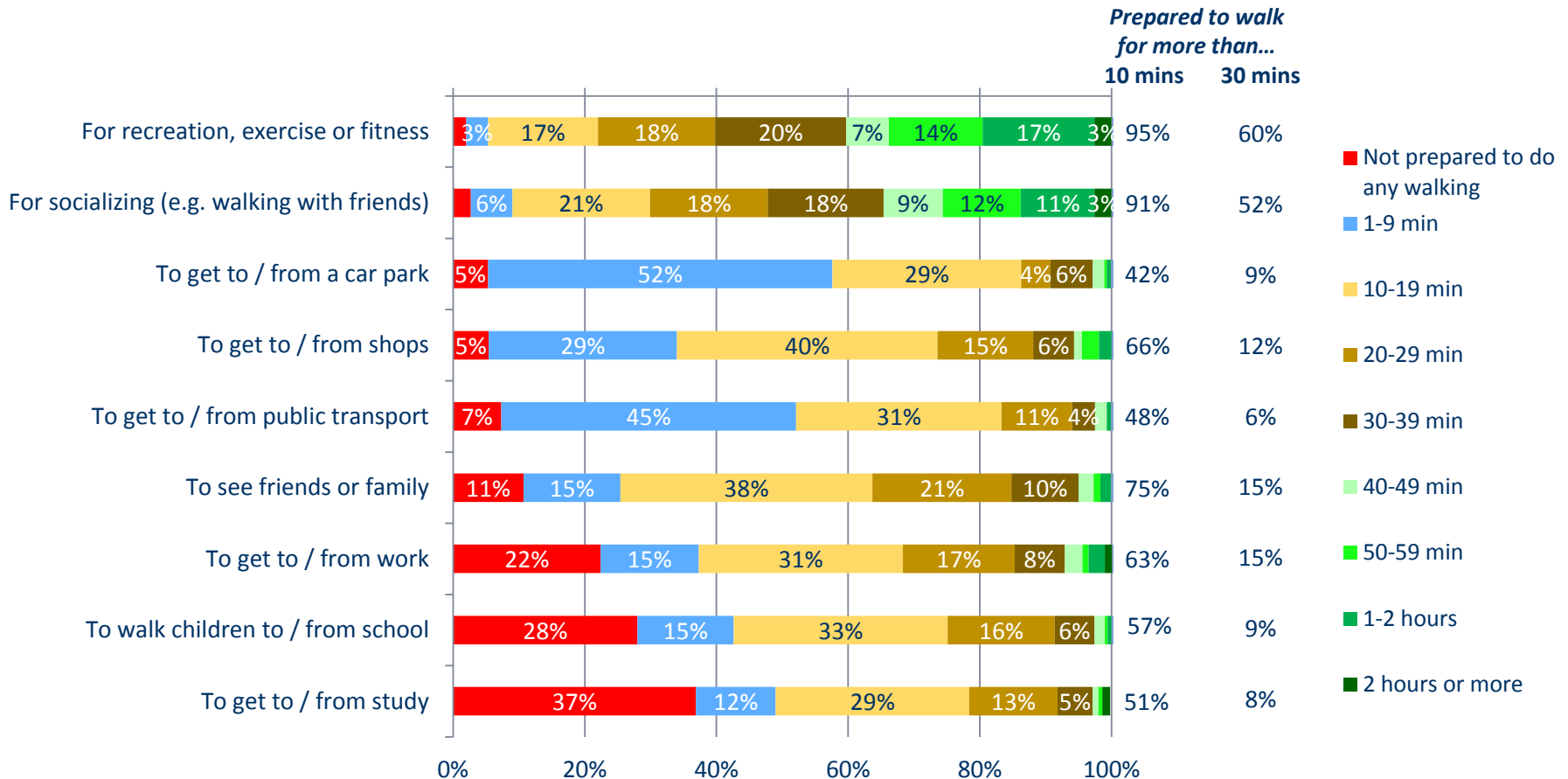
S8 Do you have any disability or impairment that affects your ability to move?

Q7.1 For these next questions, please think about walking for ten minutes or more, as part of a specific journey to a chosen destination. This could include walking to or from a bus-stop, train station, car-park, shops, to work, to study or elsewhere. Thinking about these walks of ten minutes or more, which of these statements best applies to you?

Walking:
3. What is the
opportunity in the
Primed / Preparation
segment?



52% of those in Primed or Preparation mode would not walk more than 9 minutes to/from public transport – emphasising the need for accessible bus / train / ferry points



Q7.10 What would be the maximum length of walk you would be prepared to start regularly doing for each of the purposes shown below?

Base: Primed segment & Preparation segment (n=218)

Walking:

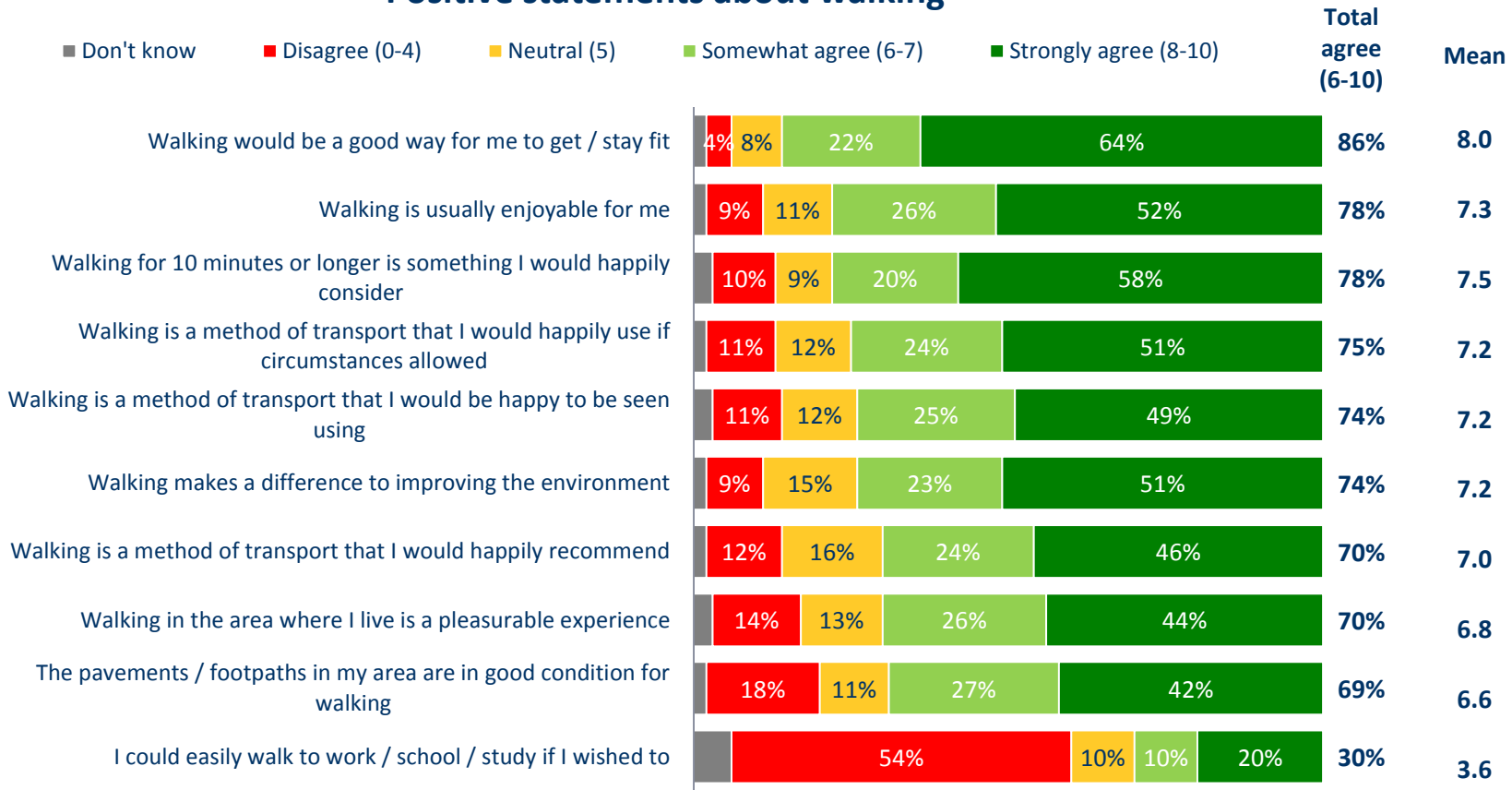
4. How can we increase walking as an active transport mode?

We have already seen that health / fitness is a strong motivator, are there other motivators / barriers to walking regularly?



All segments agree that 'walking would be a good way to get / stay fit'. Only 30% agree that they could easily walk to work / school / study

Positive statements about walking



Q7.7 How strongly do you agree or disagree with each of the following statements about walking in Auckland?
Base: General public who are able (n=1,148)

Significantly higher than general public sample in **green**
Significantly lower than general public sample in **red**

For Primed walkers, having other people to walk with is a key **motivator** – but this is unlikely to drive ‘journey’ walking

Walking motivators

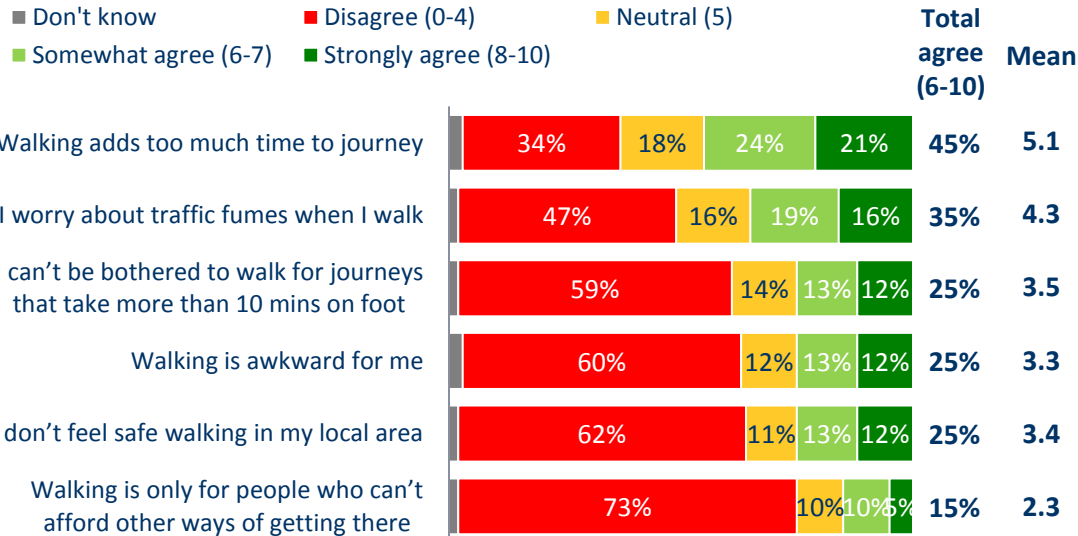


Significantly higher than general public sample in **green**
Significantly lower than general public sample in **red**

Q7.9 Which, if any, of the following would encourage you to walk more often or for greater distances?
Base: General public who are able (n=1,148)

Time & traffic fumes are two of the stronger **barriers** for most segments. Also, 1 in 4 don't feel safe walking in their area

Negative statements about walking



Total % agree (6-10) by segments

	Pre-primed (n=274)	Primed (n=206)	Change (n=142)	Normalised (n=514)	Enthusiasts – all segments (n=153)
Walking adds too much time to journey	59%	44%	43%	36%	32%
I worry about traffic fumes when I walk	39%	29%	36%	35%	42%
I can't be bothered to walk for journeys that take more than 10 mins on foot	46%	30%	23%	13%	11%
Walking is awkward for me	40%	31%	22%	15%	14%
I don't feel safe walking in my local area	36%	25%	19%	19%	13%
Walking is only for people who can't afford other ways of getting there	22%	16%	11%	11%	3%

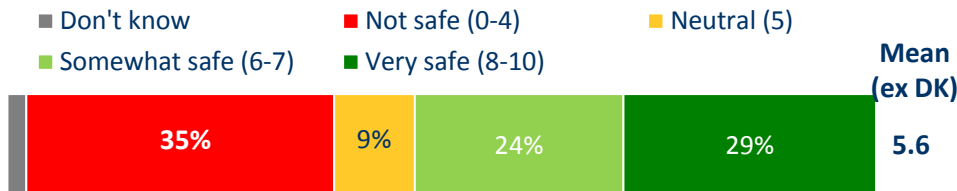
Significantly higher than general public sample in **green**
Significantly lower than general public sample in **red**



Q7.7 How strongly do you agree or disagree with each of the following statements about walking in Auckland?
Base: General public who are able (n=1,148)

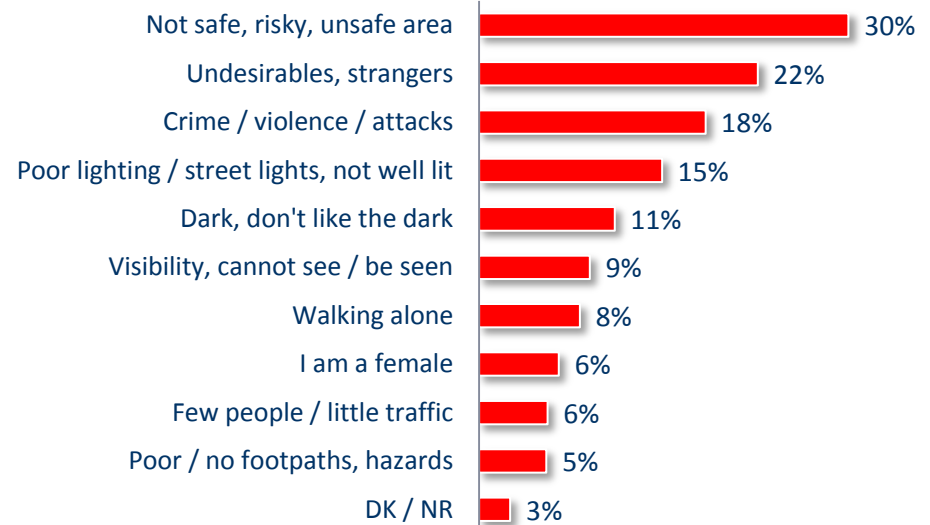
Almost 2 in 5 Aucklanders feel unsafe walking at night, with roughly half of women feeling unsafe

Safety walking at night



Only 3% do not feel safe walking in the daytime, with the key reason being 'undesirables / strangers'

Reasons for not feeling safe walking at night (n=418)



More likely to claim it is not safe to walk at night time if:

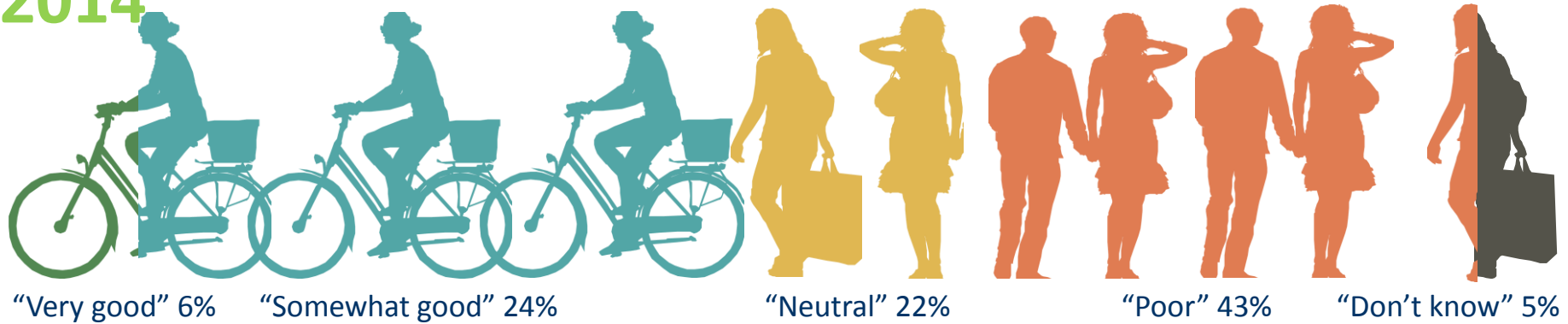
- Female (49%);
- Live in West (45%) or South Auckland (47%);
- Live in Waitakere (48%) or Manurewa / Papakura (57%).

Summary: key take-outs



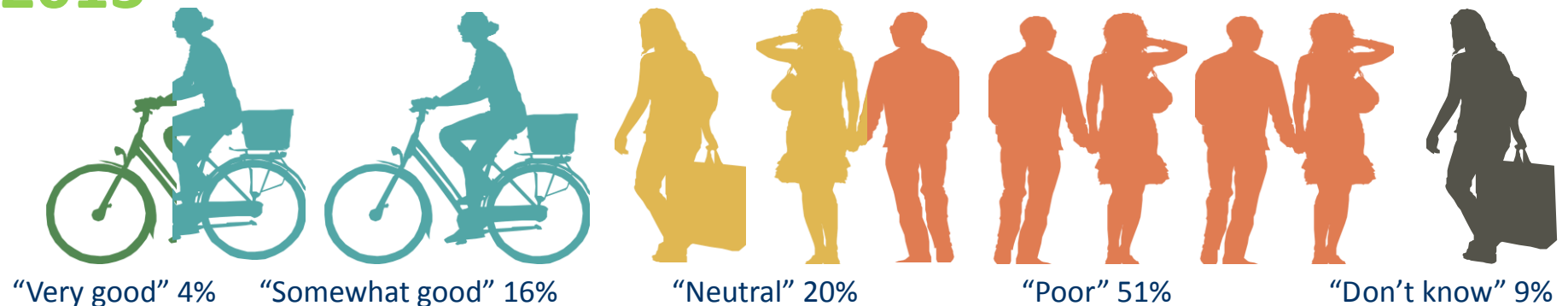
The “current state of cycling in Auckland” has improved

2014



Mean score out of 10: 4.5

2013



Mean score out of 10: 4.0

Q4.16 Overall, how do you view the current state of cycling in Auckland? (Please give us your opinion even if you don't cycle yourself.)

Random sample 2013 (n=1,048), 2014 (n=1,250)

So, who is cycling? >>>>>

However, confidence is low. The pre-primed (those not wanting to cycle) in particular, are not at all confident about cycling in Auckland area.

	Total (n=420) (Average)	Pre-primed (n=255)	Primed (n=91)	Preparation (n=16)	Change (n=26)	Normalised (n=32)
0 = Not at all confident/10 = Extremely confident	4.1	3	5.1	5.4	5.9	7.6

Significantly higher than average in **green**
Significantly lower than average in **red**

Q2.2a In general, how confident are you/would you be in riding a bicycle in the Auckland area?





Regular and Potential Cyclists are small in number

- 9% of Auckland adults are 'Primed' and 'Preparation' cyclists and are more likely to be men aged 15-34 years.
- Regular cyclists comprise just 5% of the adult population and are more likely to be low income European men aged 35-64.

But Regular Cyclists have noticed the improvements of AT

- Perceptions of cycling in Auckland have become divided - with regular cyclists increasing in satisfaction and keeping up their riding, despite the irregular majority losing confidence and expecting to ride less.





More cycling and more pro-cycling attitudes can be encouraged by building & promoting more , safer cycle infrastructure

- The majority of 'able cyclists' claim they would attend, or suggest, AT cycling training courses, especially Workplace Training.
- There is strong support for Auckland Transport to fund cycling training courses.

E-Bikes interest is high

- Of the 'able market', 48% have heard of e-bikes, and 50% stated they would cycle more if they had an e-bike, because they are faster, easier up hills and don't make riders as sweaty.
- Anecdotal evidence shows that NZ is in the early stages of a rapid rise in e-bike usage.



The main concern is safety – danger from other traffic and cycling in the dark.

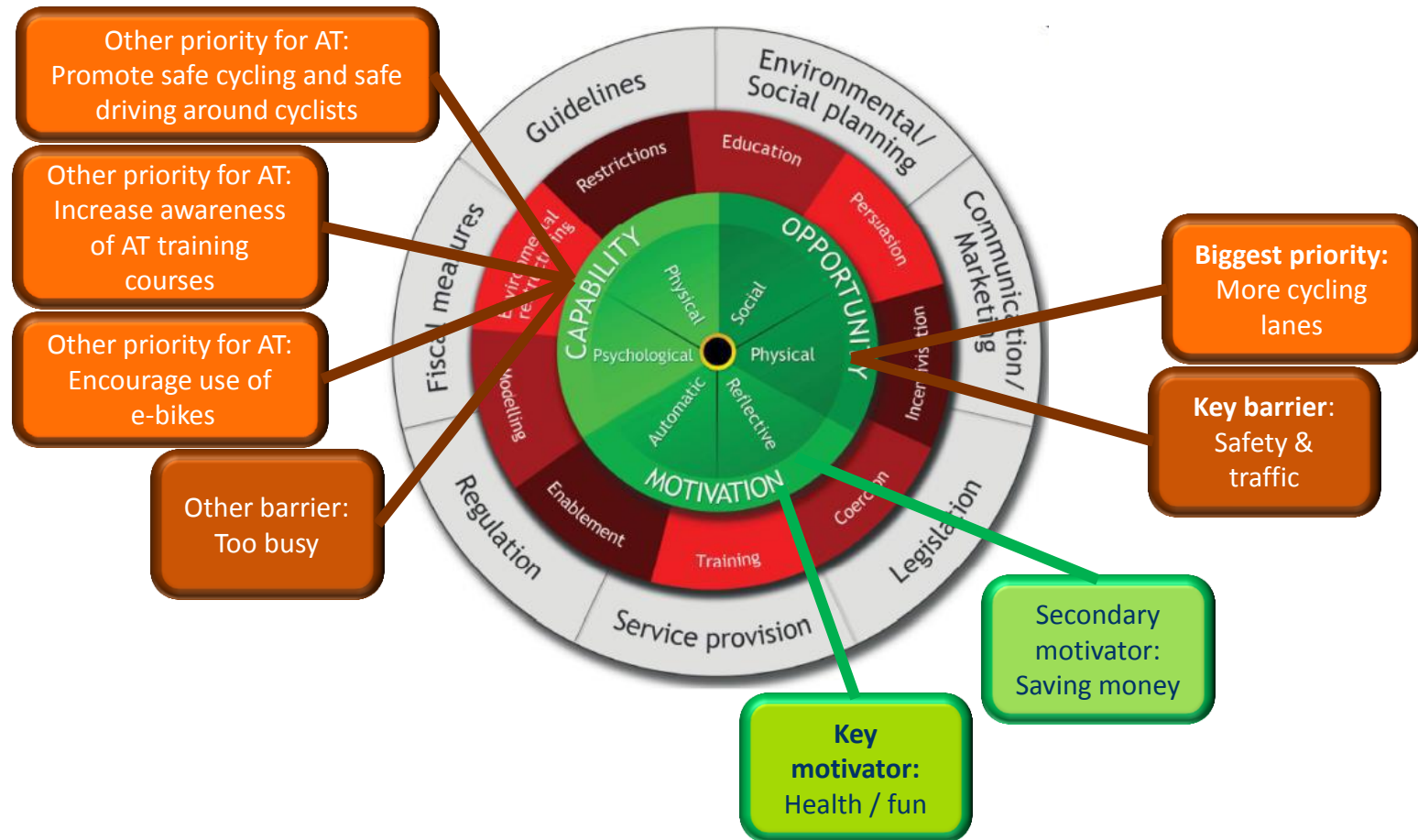
	Total (n=362) (Average)	Pre-primed (n=255)	Primed (n=91)	Preparation (n=16)
Not safe on roads because how people drive	49%	50%	44%	53%
Not enough cycle lanes separated from other traffic	47%	49%	47%	12%
Not safe cycling in dark	45%	49%	39%	12%
Would not be enjoyable because of narrow roads	40%	45%	30%	30%
Showering/changing after cycling would be inconvenient	28%	30%	22%	43%
No where secure to leave bicycle	28%	27%	29%	39%
Would not be enjoyable because of traffic noise	23%	26%	16%	16%
Cycling not a quick way for me to travel where I want to go	22%	23%	22%	12%
Would not be able to fix problems like punctures	16%	17%	13%	13%
Wouldn't be able to get to safe cycling areas	15%	17%	12%	4%
Wouldn't be enjoyable because of lack of fitness/confidence	14%	18%	3%	4%
Live too far from work/school for cycling to be practical	12%	11%	15%	17%
Don't have someone to cycle with	11%	13%	11%	0%
Concerned about what I would look like on bike/in cycling gear	9%	11%	4%	0%
Someone else doesn't want me to cycle	4%	5%	5%	0%
Cycling would cost too much money	3%	2%	6%	0%



Q3.8a Sometimes people tell us there are things that stop them from cycling. When it comes to cycling in Auckland, which of these statements apply to you?

Significantly higher than average in **green**
Significantly lower than average in **red**

Cycling: key motivators, barriers & priorities





32% are walking more often than a year ago and 35% expect to walk more. However most walking seems to be due to a lack of cars, rather than an active preference for walking.

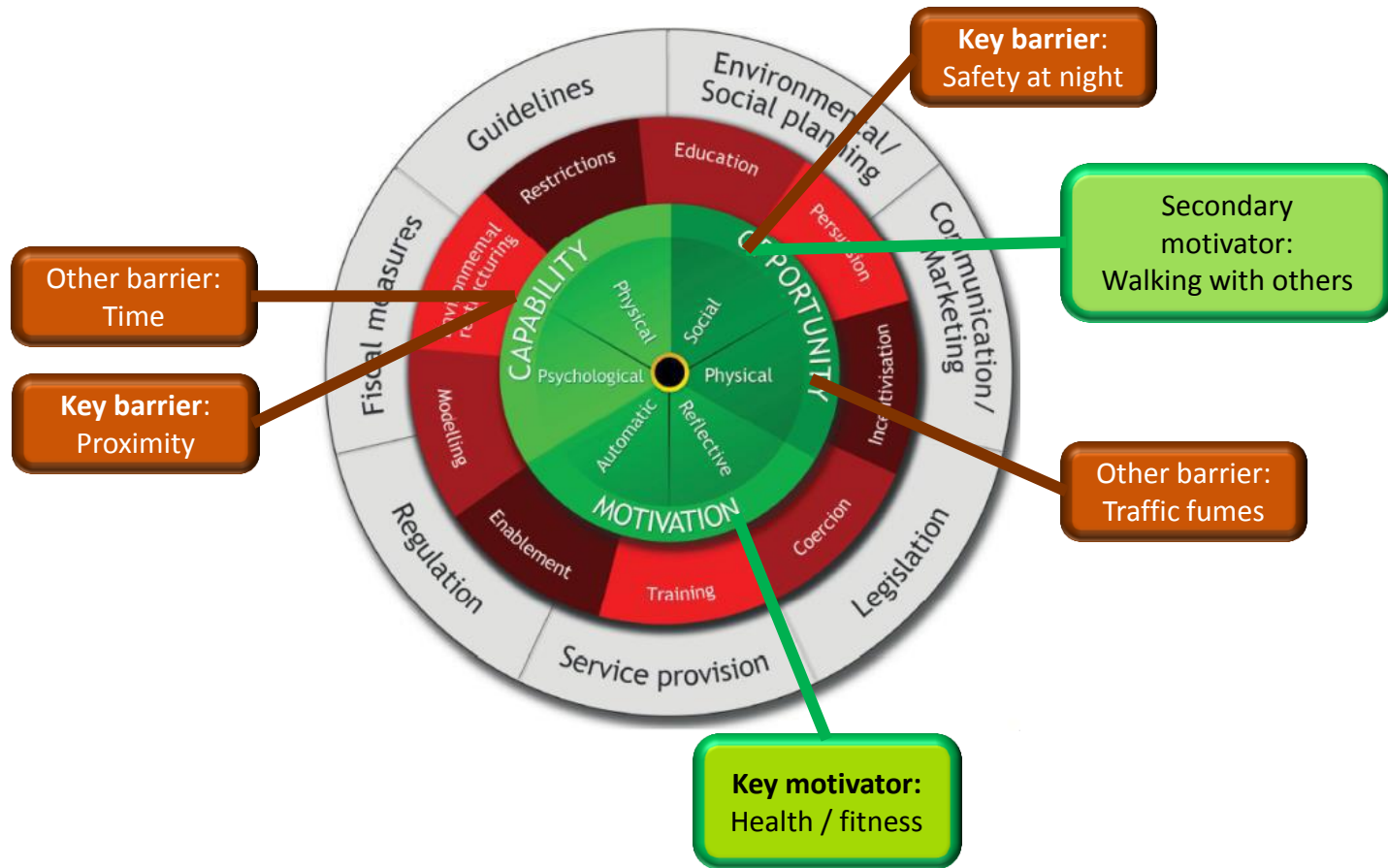
- Time and motivation are the key barriers for non-walkers.
- The main cited reason for walking is health / fitness and shopping.
- However, regular walkers are more likely to be low-income and therefore a lack of car access may be the *real* reason.

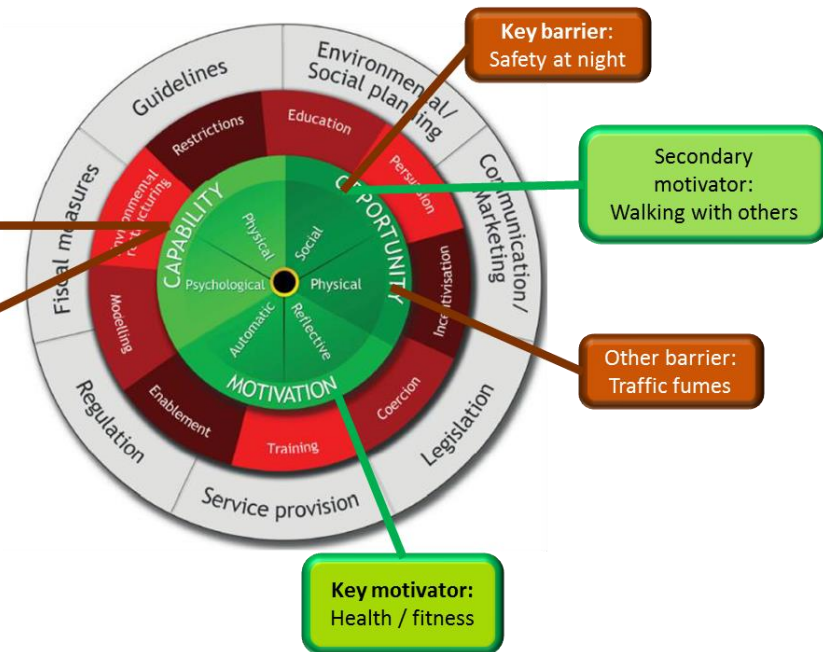
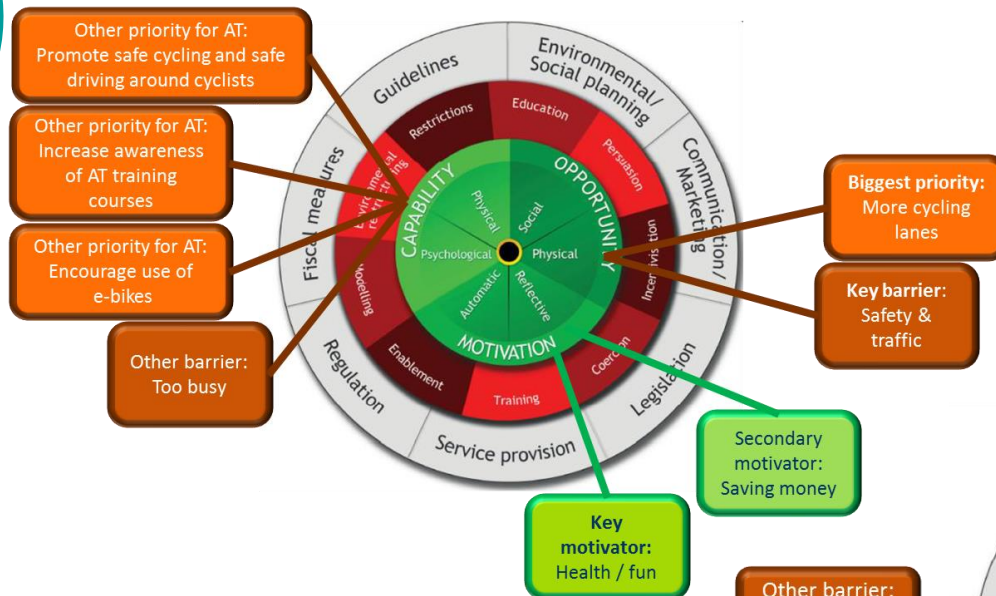
Encouraging more ‘journey walking’ will require more public transport access points

- Proximity to destination is a barrier for 54% of the able population, and 52% of those in Primed or Preparation mode would not walk more than 9 minutes to/from public transport – emphasising the need for accessible bus / train / ferry points.
- Other barriers are time (45%), traffic fumes (35%) and safety (25% of able population).



Walking: key motivators, barriers & priorities





Questions?

Thank you!

Any enquiries, please contact us.

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