

TRA

AUCKLAND TRANSPORT | JUNE 2017

Measuring and growing active modes of transport in Auckland

WAVE 3

The overall business objective is to:

Manage the roading network by making the right investment decisions and promote active modes of transport to drive behaviour change.



Auckland Transport (AT) conduct an annual quantitative survey

To understand behaviours, attitudes and perceptions of different modes of travel, and to measure this over time.



A 15 minute online survey of n=1,477 Aucklanders



Representative of the Auckland population by age, gender and location (ward)



Including a booster of those that cycle at least once a week to ensure a robust sample size



With interviewing completed in May 2017

Agenda

01

What progress
have we made in
Cycling?

02

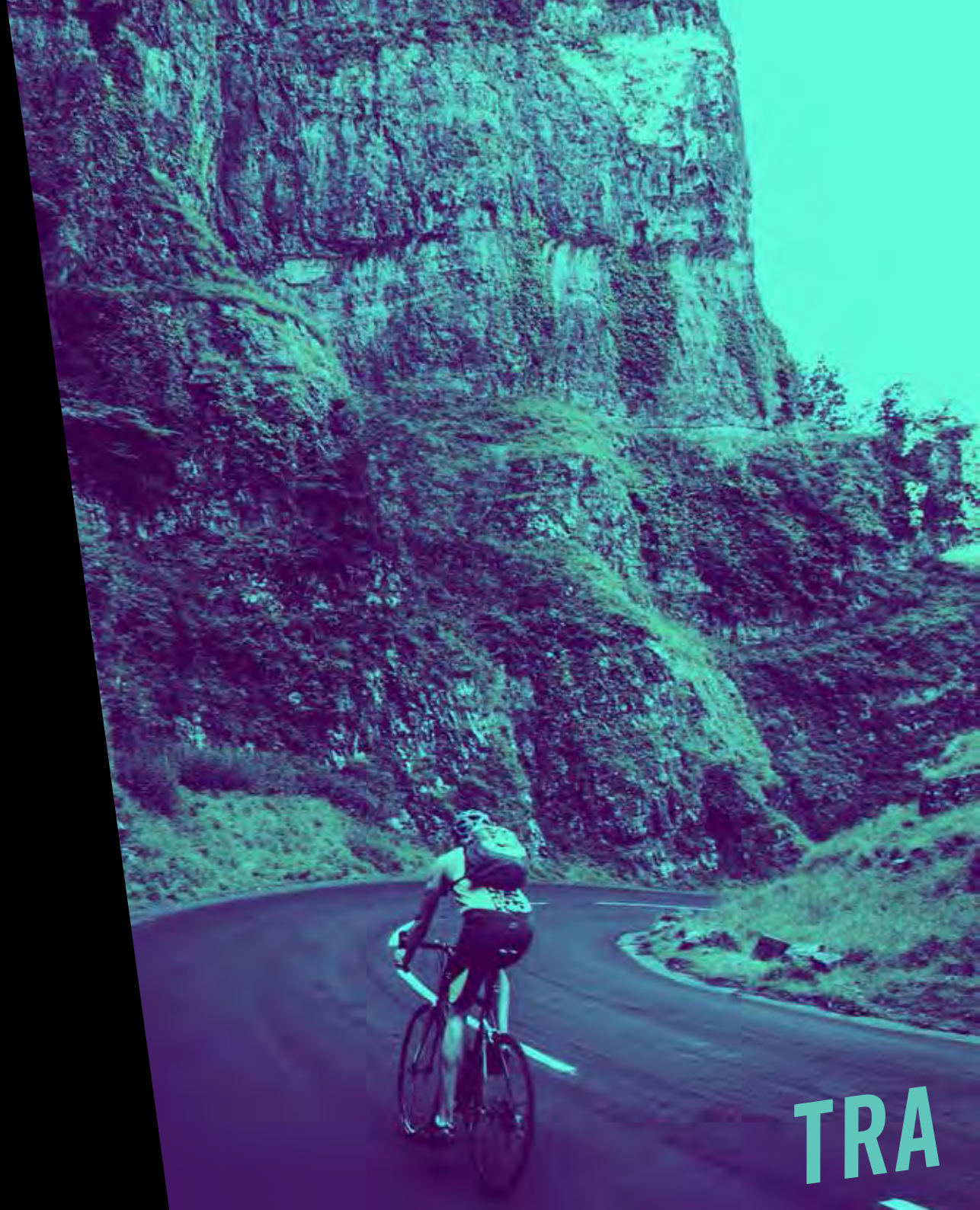
What progress
have we made in
Walking?

03

Understanding
different groups.

**What progress
have AT made
in Cycling?**

1

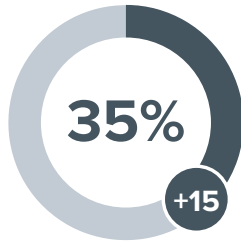


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Aucklanders continue to cycle in greater numbers

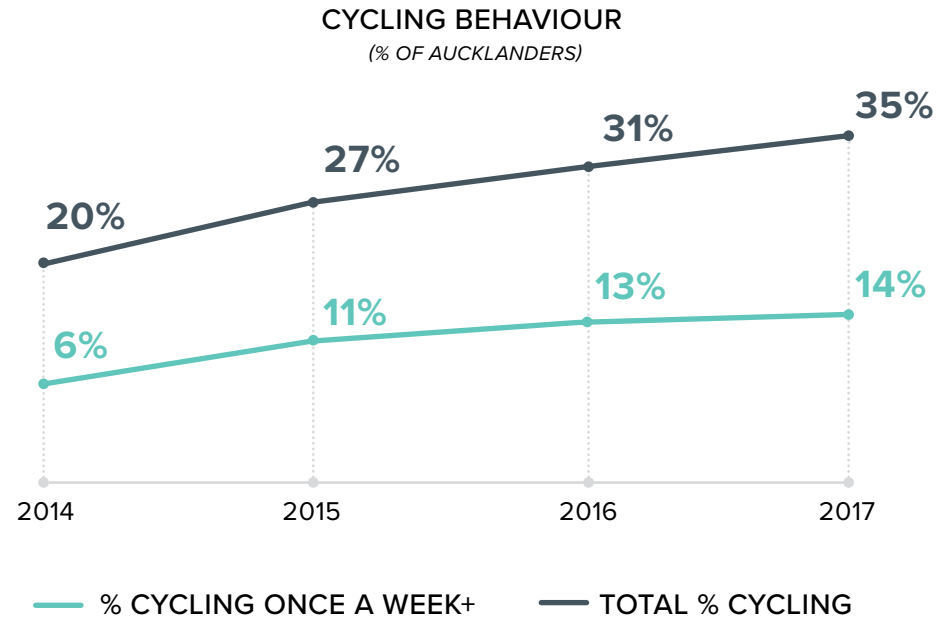
The proportion of Aucklanders who are cycling has increased to 35%



(up 4 points on 2016 and 15 points since 2014).

And AT also continue to make incremental gains in the proportion of Aucklanders cycling at least weekly

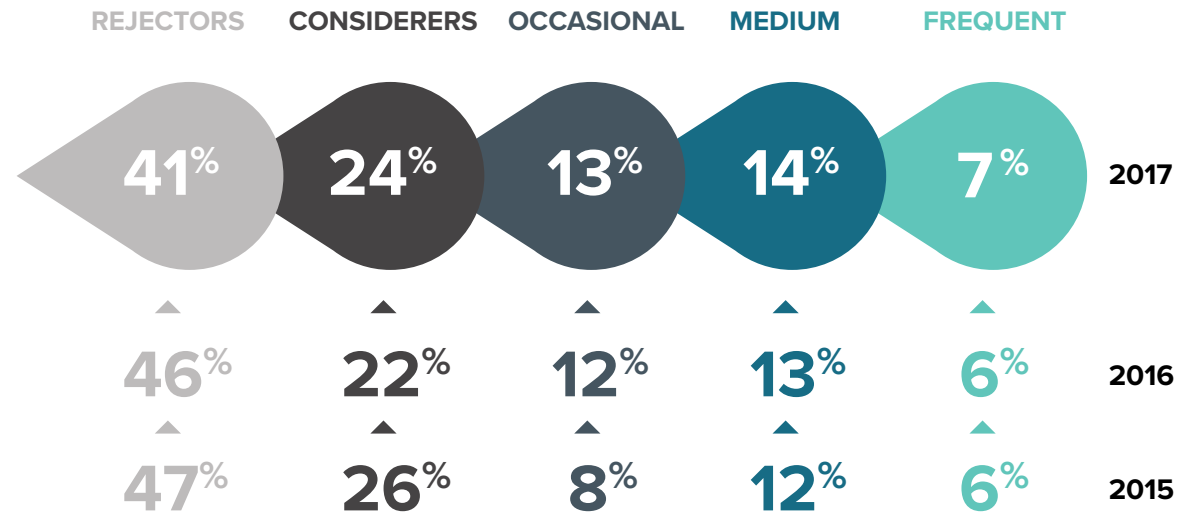
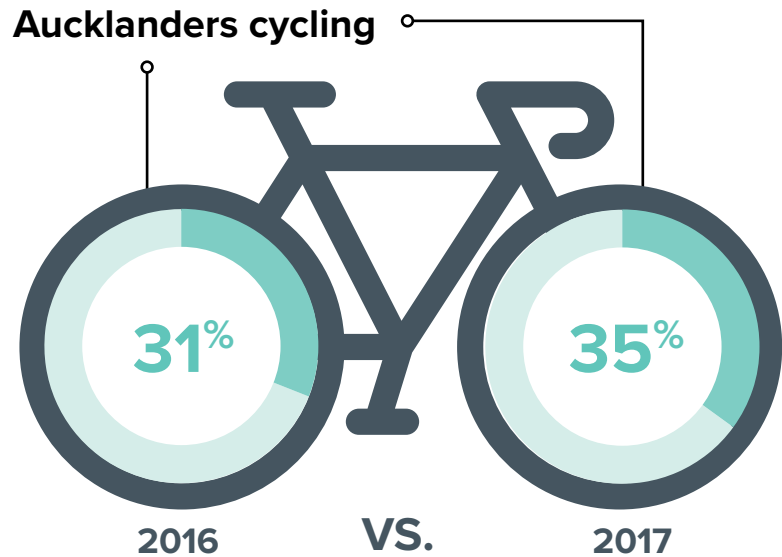
(up 1 point year on year to 14% and up 8 points since 2014).



A6. Rejectors (unable or never cycle and wouldn't consider). Considerer (Never cycle but would consider). Occasional (less than monthly). Medium (monthly or weekly). Frequent (twice a week or more).



AT have made incremental gains across the cycling adoption framework



A6. Rejectors (unable or never cycle and wouldn't consider). Considerer (Never cycle but would consider). Occasional (less than monthly). Medium (monthly or weekly). Frequent (twice a week or more).

Not only are there more people cycling in general, but there are now also less non-cyclists rejecting the idea of cycling.



The demographic of cyclists in Auckland has changed over time

The reality of who a cyclist is now differs significantly from past perceptions (and reality) of the middle aged, European male demographic.

Compared to 2015, there are

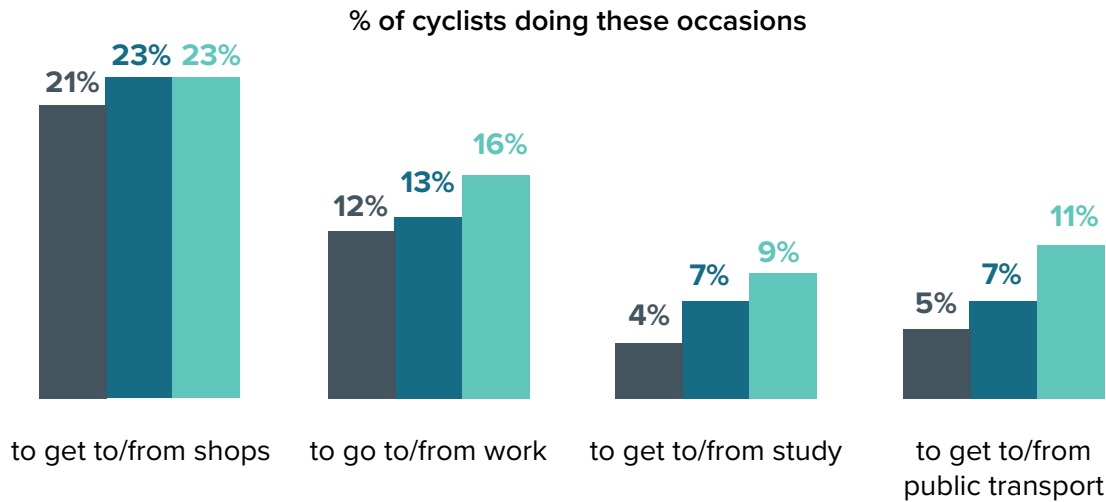
More females cycling now (43% vs. 37%), and cycling frequently – once a week or more (44% vs. 29%)

18-34's are much more likely to cycle now (51% vs. 39%), and be frequent cyclists (55% vs. 39%)

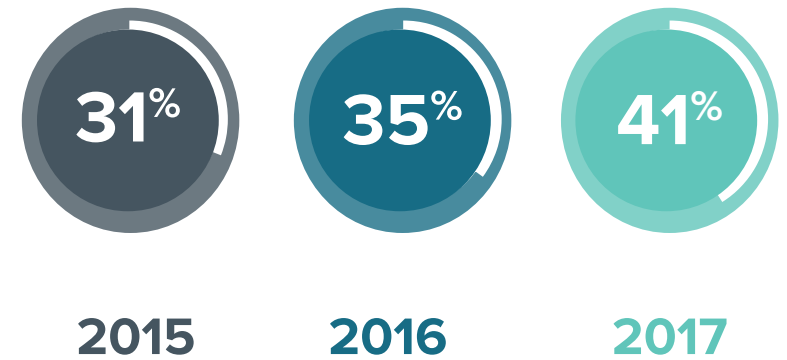
Cyclists: 2015 (n=377), 2017 (n=500)
Frequent Cyclists: 2015 (n=104), 2017 (n=115)



Importantly, the numbers cycling for key point-to-point journeys also continues to increase



When combined, there is an increase over time in the proportion of Aucklanders cycling for these key point-to-point journeys:



There has also been some significant gains in frequent point to point trips such as work, school and PT.

A7. What types of trips do you bike for? Cyclists (n=500)



Incremental movements are driving significant overall change for cycling

AT have made incremental gains in behaviour since 2014 in getting:

- ◆ More Aucklanders cycling
- ◆ Those who are cycling to do so more frequently
- ◆ And more cycling the key point-to-point journeys that we want them to

This has led to significant change overall and impacted on taking more people out of their cars and off the roads.





Aucklanders are increasingly using cycling as an active mode

+45,600
NEW CYCLISTS OVERALL



The proportion of Aucklanders cycling overall has increased 4% points year on year to 35%.

+40,000
DOING POINT-TO-POINT TRIPS



While the proportion of cyclists doing point-to-point journeys has increased 6% points this year to 41%

* Population extrapolation based on 2013 Census figures for Auckland 15+ population.



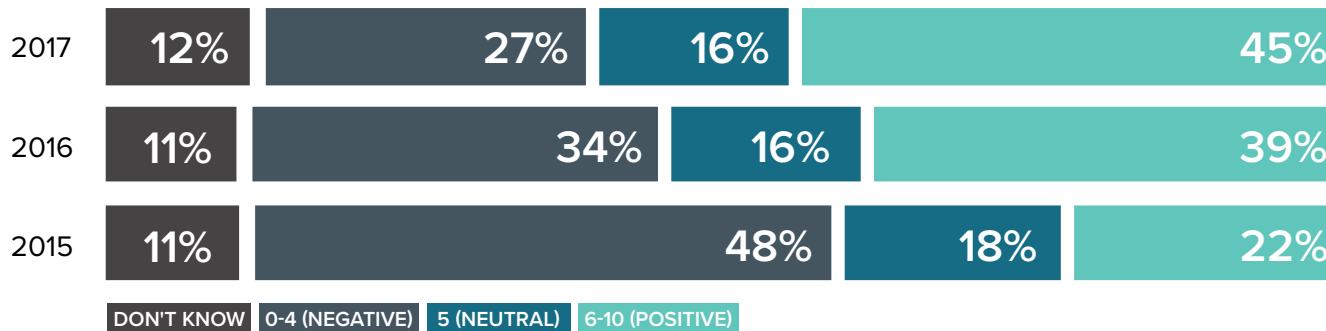
Importantly, AT are now at a point where they are starting to see normalisation occur with over a third of Aucklanders cycling.

This will play a key role in the future to encourage others to cycle and further reinforce current behaviours around cycling.



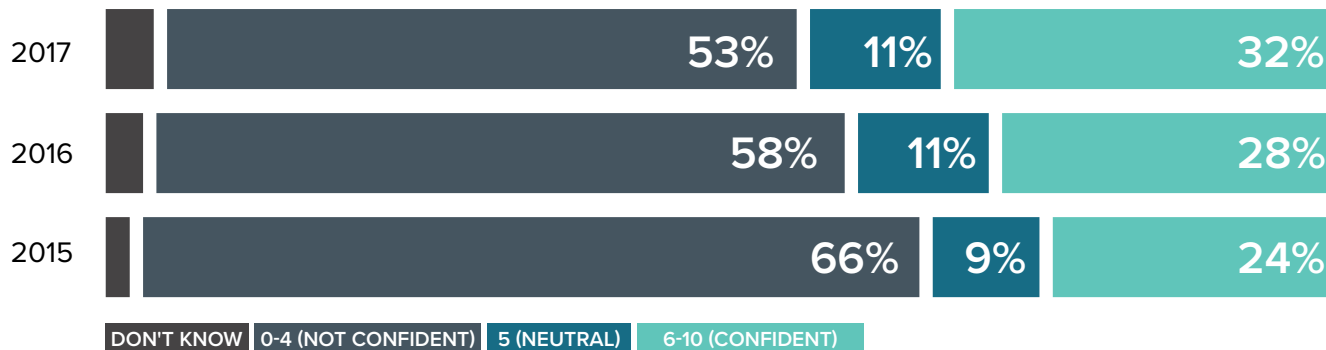
Improved perceptions of cycling are helping to drive behaviour change

OVERALL STATE OF CYCLING



Perceptions around the overall state of cycling in Auckland continue to improve.

CONFIDENCE IN CYCLING



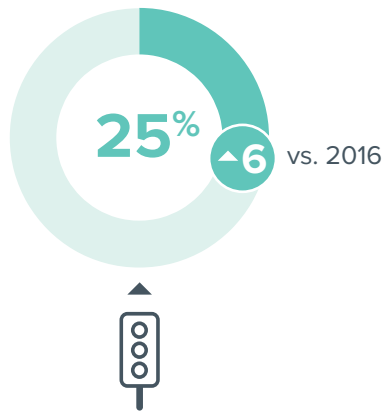
And this is leading to greater levels of confidence in cycling in Auckland.

A24. Overall, how do you view the current state of cycling in Auckland? Total sample (n=1477)
 A5a. In general, how confident are you/would you be in riding a bicycle in the Auckland area? Able bodied (n=1322)

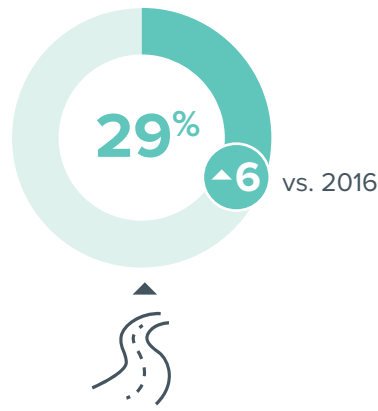


Cycling infrastructure is helping to drive improved perceptions of safety and confidence

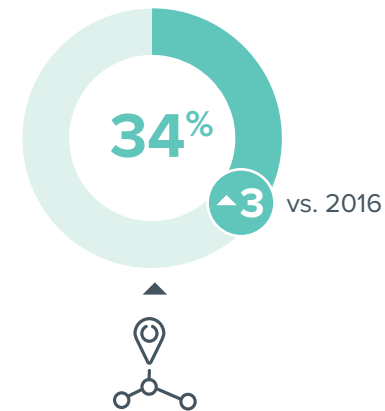
There have been significant gains year on year in Aucklanders' perceptions towards cycling infrastructure.



agree cyclists are sufficiently separated from traffic



agree there are enough cycle lanes and cycle paths in Auckland



agree Auckland has a well connected cycle network

While, over half of Aucklanders (53%) believe that ‘a lot is being done to improve cycling in Auckland’.

This will be directly impacting on perceptions of safety and helping to build confidence in cycling within the city.

A26. How strongly do you agree, or disagree, with each of the following statements? Able bodied (n=1322)



This is also reflected in the changes AT are seeing around the barriers and levers to cycling

Infrastructure is helping to reduce barriers and drive motivations for cycling:

AMPLIFIED



DIMINISHED

Looking at the reasons why people cycle:

It's fun	▲ 10% PTS
Availability of cycle ways or cycle paths	▲ 6% PTS
Helps address environmental concerns	▲ 5% PTS
Allows me to enjoy the weather	▲ 4% PTS

And importantly, AT are also seeing improvements around the emotional reasons for cycling, fun and enjoyment – helping to encourage repeat behaviour.

Looking at the barriers to cycling / cycling more:

I don't feel safe cycling in the dark	▼ 10% PTS
There's not enough cycle lanes or separated routes	▼ 7% PTS
Cycling is not a quick way for me to get where I need to go	▼ 7% PTS
I don't feel safe because of how people drive	▼ 6% PTS
I live too far away for it to be practical	▼ 6% PTS

And a reduction in the perceived functional barriers of distance and time – helping to encourage trial.

A17. From the list below, what are the key reasons you choose to cycle? Cyclists (n=500)

A20. Barriers to cycling / cycling more. Able bodied (n=1322)

As compared to 2016



Perceptions of infrastructure are stronger in the areas they are located

Those who live in the fringe suburbs are more likely to be positive towards the cycling infrastructure.

This is also helping to drive behaviour – with an over-index in the proportion of frequent cyclists (9%) living in the fringe suburbs.

	FRINGE SUBURBS	NON-FRINGE SUBURBS	DIFFERENCE
Cycle lanes in Auckland are of good quality	58%	43%	▲15%
A lot is being done to improve cycling in Auckland	60%	52%	▲8%
Auckland has a well connected cycle network	40%	32%	▲8%
Cyclists are sufficiently separated from traffic	27%	22%	▲5%
There are enough cycle lanes and cycle paths in Auckland	29%	26%	▲3%

Fringe suburbs 2016/2017 combined (n=68)

Non-fringe suburbs 2016/2017 combined (n=2206)

Fringe suburbs are made up of – Grafton, Parnell, Newmarket, Eden Terrace, Freemans Bay, Herne Bay, St Mary's Bay Grey Lynn

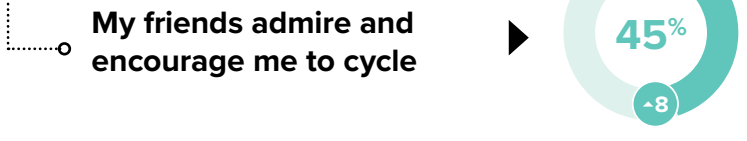


The role that influencers are playing is also contributing to growth

Amongst the wider population people are seeing friends, family and colleagues cycling in greater numbers.



While on the flip-side, cyclists are receiving greater encouragement to cycle from those around them



This reinforces what AT are seeing around the normalisation of cycling.

It is becoming a much more accepted and encouraged way to travel amongst the wider population.

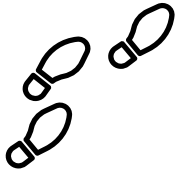
Q4a. And how strongly do you agree, or disagree, with each of the following statements?
 First two statements - Able bodied (n=1322)
 Second two statements - Cyclists (n=500)

**What progress
have AT made
in Walking?**

2



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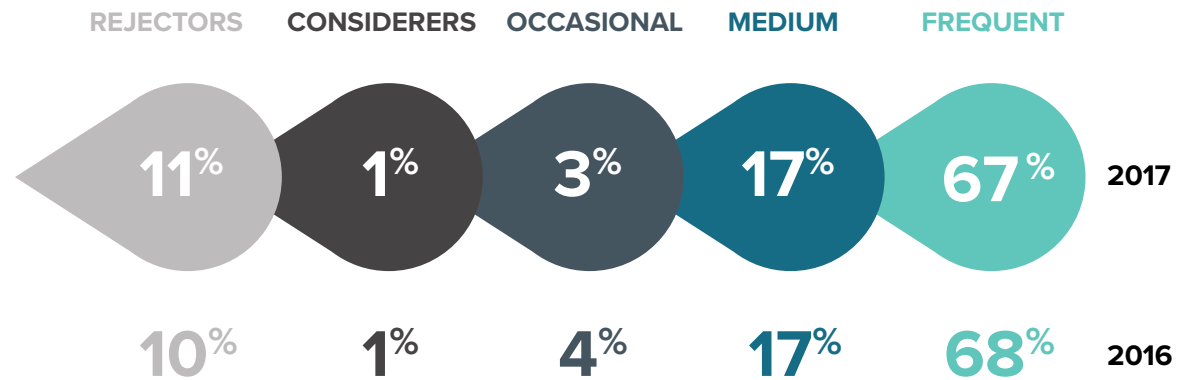
Walking behaviour at an Auckland wide level is largely static.

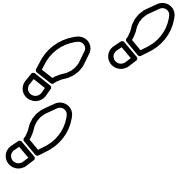


88% of Aucklanders are walking vs. 89% in 2016



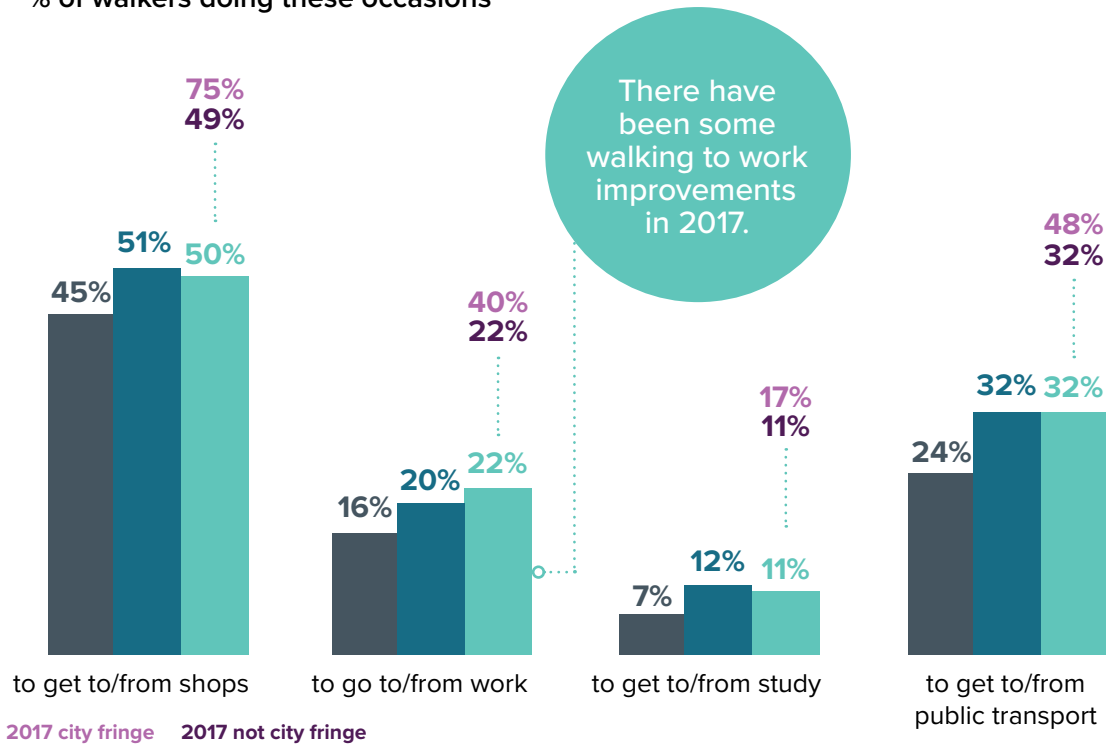
While 67% of Aucklanders are walking frequently (once a week or more) vs. 68% in 2016



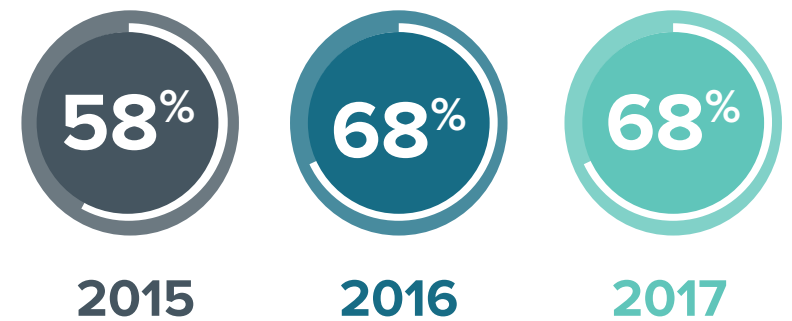


The number doing key point-to-point journeys also remains steady for walkers this year

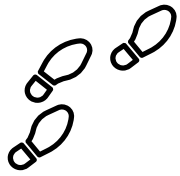
% of walkers doing these occasions



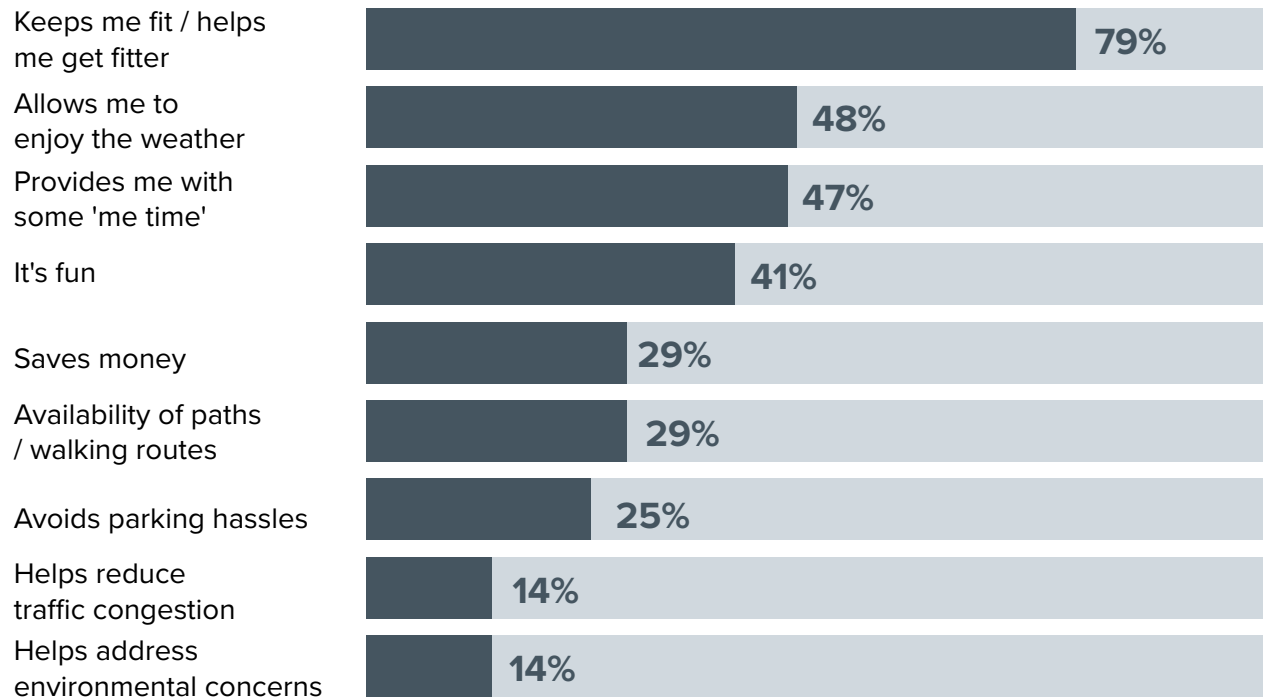
AT made gains in 2016 in getting more Aucklanders to walk for the key point-to-point journeys combined.



B3. What types of trips do you walk for? Walkers (n=1296)



What are the things that motivate people to walk?



Q10 From the list below, what are the key reasons you choose to walk? Frequent walkers (n=986)

Understanding different groups

3



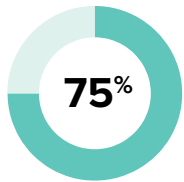
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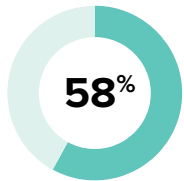
Understanding Rejectors in greater depth

Rejectors are more likely to be older – nearly half (47%) are aged 55+.

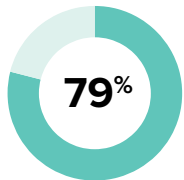
Convincing the majority of this group to start cycling now will be very challenging.



**don't have a bike,
or access to one**



**have not cycled
as an adult**



**would not feel confident
cycling in Auckland**

**They have very strong barriers
around safety, and effort (distance,
time and having to carry things)**





Understanding Considerers in greater depth

What do considerers look like as a demographic?

- ▶ They are slightly female skewed (53% vs. 43% for cyclists overall)
- ▶ And whilst the majority (50%) are NZ European, this group does over index on minority ethnicities – Māori, Pacific Islanders, Asian, other Europeans, and Other ethnic groups

Importantly, most have had past experience with cycling - nearly all (89%) have cycled as a child and the majority (63%) have also previously cycled as an adult.





What are the key barriers to cycling for Considerers?

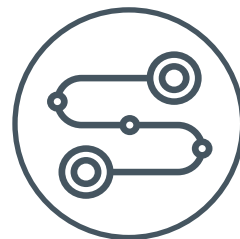
The main barriers for this group are about their confidence in cycling, having a bike to do it and the effort required.



▼
Don't feel safe because of how people drive, lack of cycle ways or cycling in the dark



▼
Don't have access to a bike



▼
Distance is too far



▼
Need to carry things



So what do Recreational-only cyclists look like:

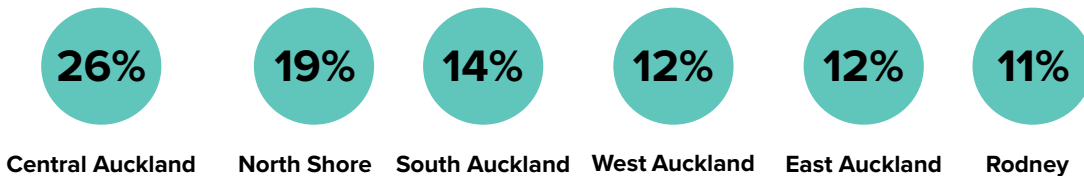
In terms of gender they are similar to cyclists overall



However, they are older



They are from a wide range of suburbs



And they are riding similar bikes to other cyclists

44% have a mountain bike, 41% a road bike, and 9% a commuter/hybrid bike





What are their barriers to cycling the key point to point journeys?

Safety remains a key concern for this group – along with a range of other functional barriers:

**Safety / lack of
cycle lanes**

**Lack of bike
storage at
destination**

**Need to carry
things**

**Distance is
too far**

**Don't like
sweating /
Lack of shower
facilities**