

JULY 2016

PREPARED FOR:
AUCKLAND TRANSPORT

MEASURING AND GROWING ACTIVE MODES OF TRANSPORT IN AUCKLAND

TRA

The overall
business
objective

**MANAGE THE ROADING NETWORK
BY MAKING THE RIGHT INVESTMENT
AND PROMOTE DECISIONS TO
ENCOURAGE BEHAVIOUR CHANGE
OF AUCKLANDERS TO ACTIVE
MODES OF TRANSPORT.**

The annual Active Modes Survey plays an important role in measuring behaviour change

In order to drive a change in behaviour, Auckland Transport is developing a deep understanding of the decision-making process around walking and cycling.

The annual Active Modes Survey provides Auckland Transport with the opportunity to measure performance in these key travel modes and track progress over time.

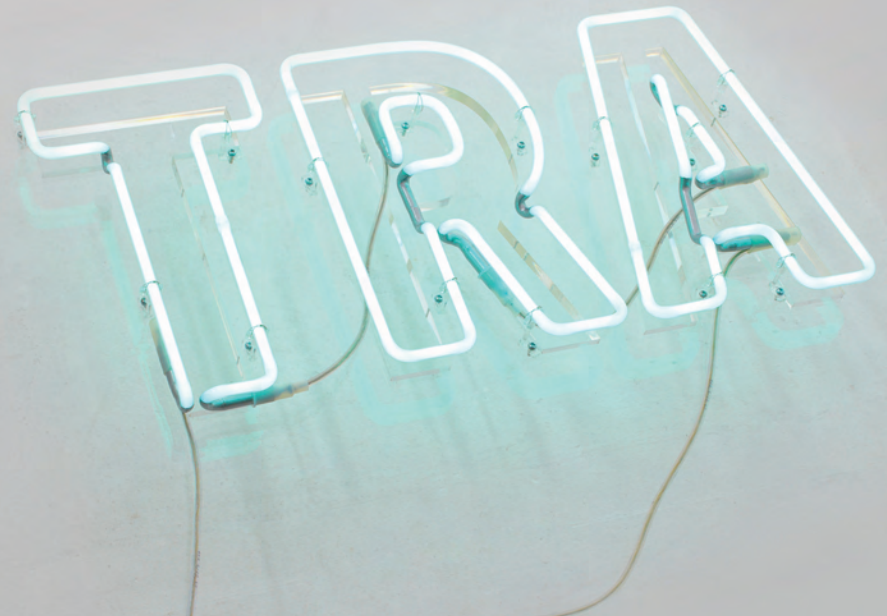
It also provides insight into where investment and promotions should be targeted to provide the strongest return.

AGENDA

- 01** Measuring progress for Active Modes
- 02** A deeper understanding of how Aucklanders travel
- 03** Opportunities to drive behaviour change
- 04** Bringing it all together

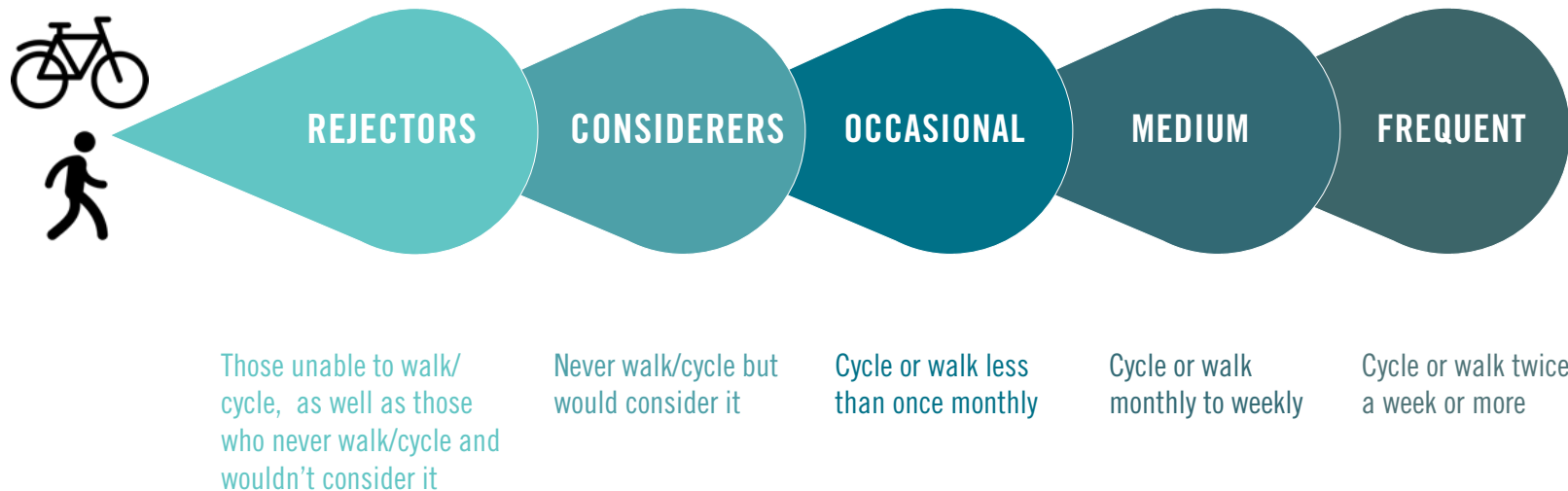
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Measuring progress for Active Modes

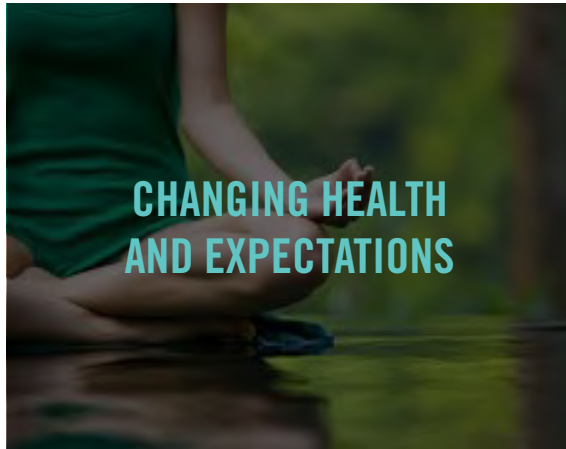


Using a common framework across the business, we think about moving people up the adoption framework

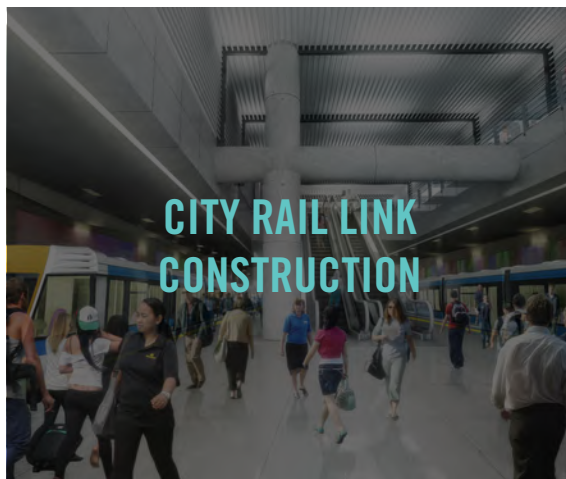
WHAT IS OUR FRAMEWORK FOR BEHAVIOUR CHANGE?



Aucklanders are bearing witness to a number of significant changes



And this is coupled with significant city and roading infrastructure developments

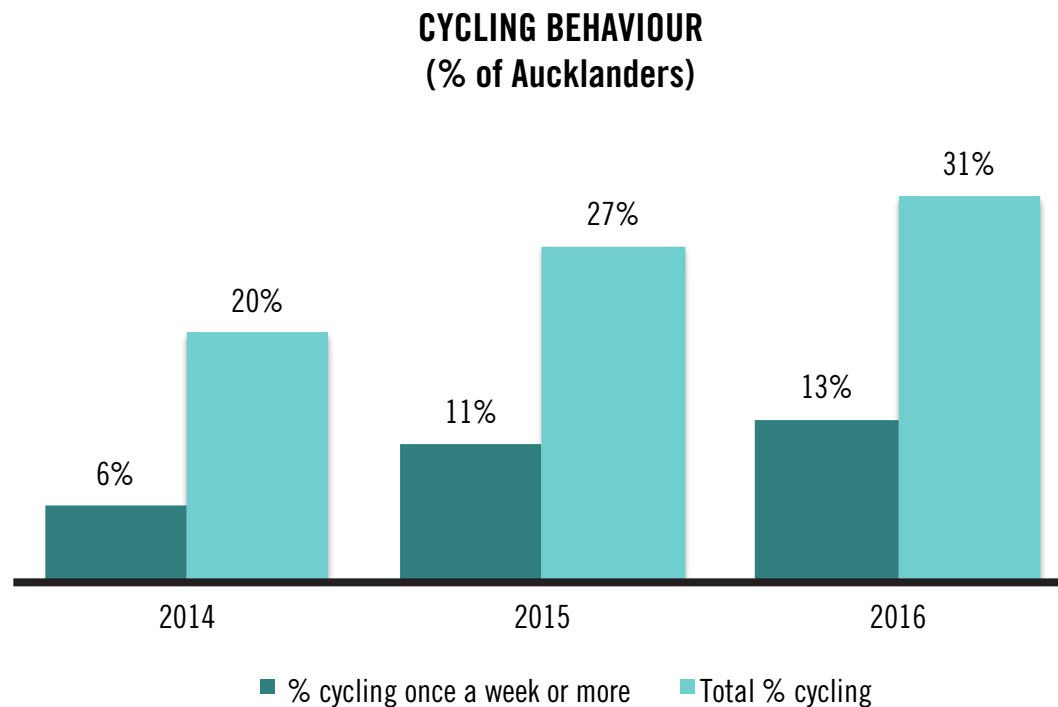


IMPLICATION

**THESE CHANGES
REPRESENT
A STRONG
OPPORTUNITY
TO GROW ACTIVE
MODES OF
TRANSPORT**



The proportion of Aucklanders cycling has increased again in 2016



Significant progress has been made in this active mode over the past two years.

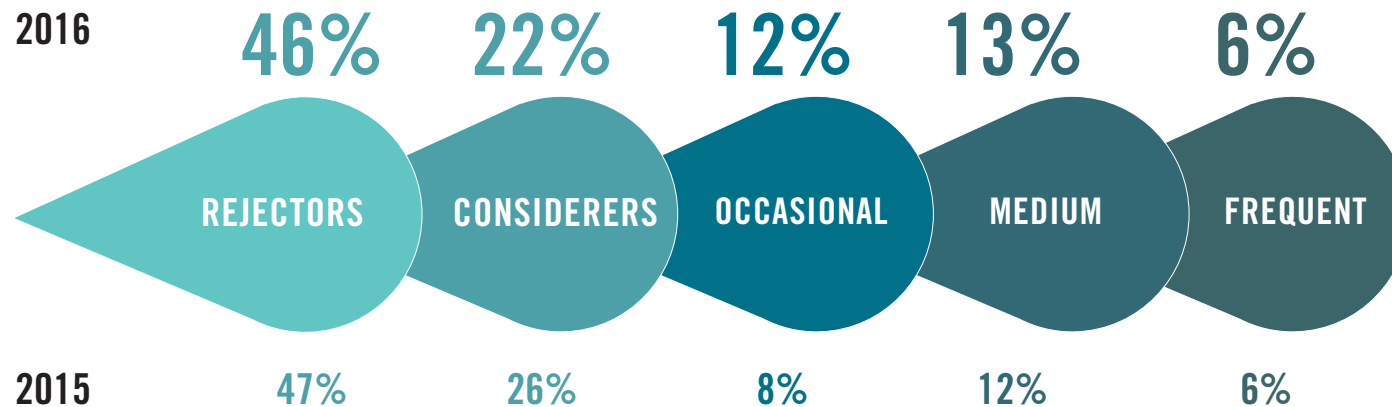
A6. On average, how often do you do each of the following, for any reason? Total sample (n=1,178)

We are seeing some migration through the adoption framework



MORE AUCKLANDERS ARE CYCLING
(up 4 points from 2015)

**31% of Aucklanders in 2016
vs 27% in 2015**



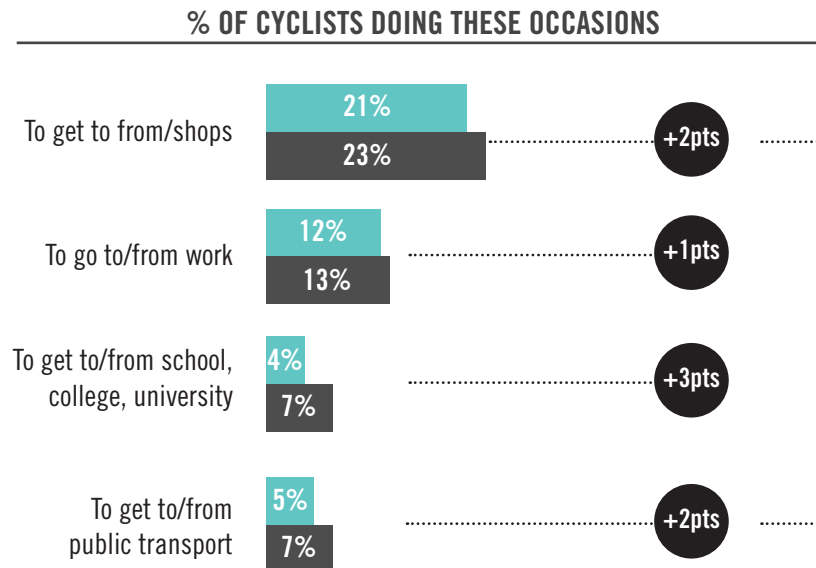
» With more Aucklanders now cycling, there is also an opportunity to get them doing more of the cycling journeys we want them to.

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

A greater proportion of cyclists are now travelling by bike for key journeys



75% Within the repertoire of cycling occasions, most Aucklanders are cycling for recreation or fitness.



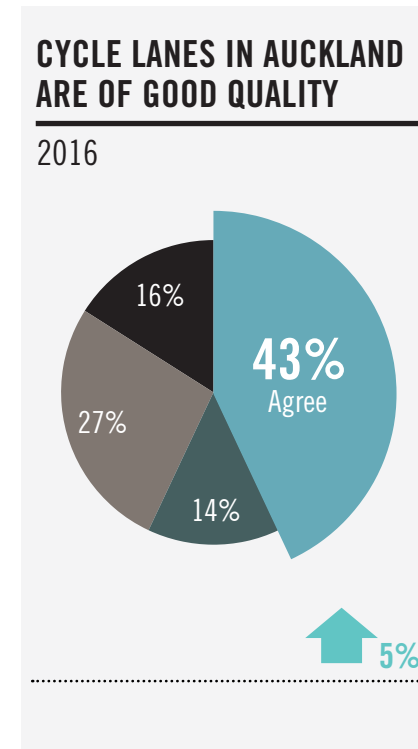
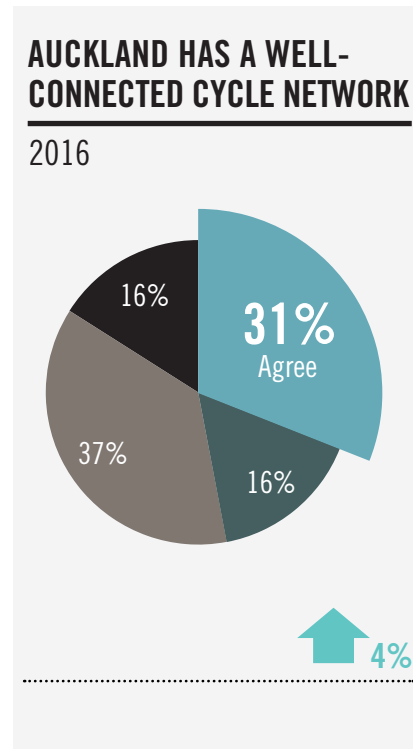
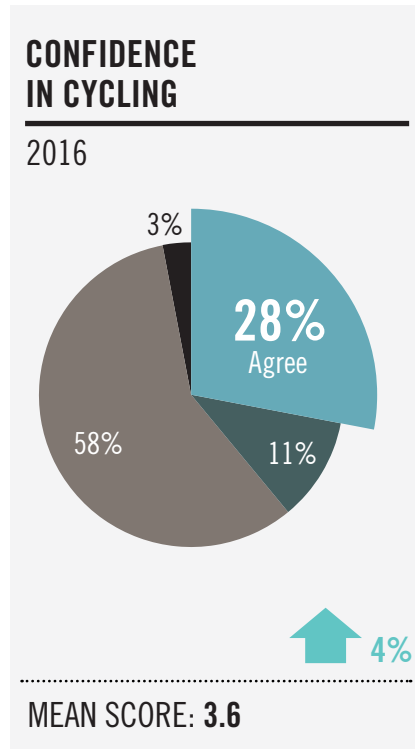
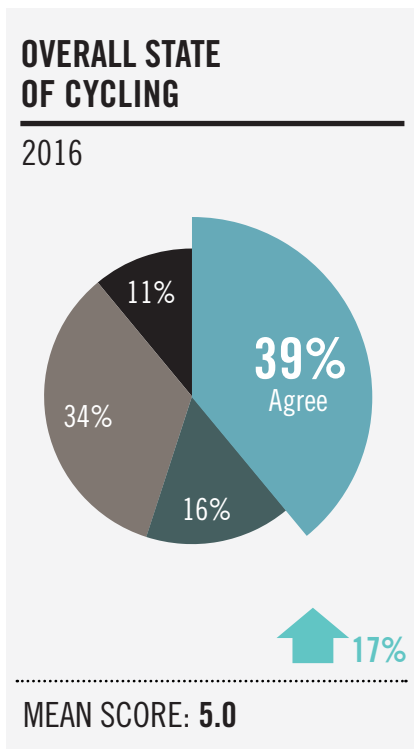
FROM **31%** IN 2015 **>>** **35%** THIS YEAR

In 2016 there is an increase in those doing key point-to-point journeys (to/from work, study, public transport or the shops) by bike.

A7. What types of trips do you bike for? Cyclists (n=424)

* Alignment of codeframe from 2015 to 2016 includes 'Exercise + Fitness' as a separate code

Beyond an increase in behaviour, we are seeing positive changes in perceptions year on year



Don't know
 0-4 (Disagree)
 5 (Neutral)
 6-10 (Agree)

Q24. Overall, how do you view the current state of cycling in Auckland? Able bodied (n=1,046)
 A5a. In general, how confident are you/would you be in riding a bicycle in the Auckland area? Able bodied (n=1,046)
 A26. How strongly do you agree, or disagree, with each of the following statements? Able bodied (n=1,046)



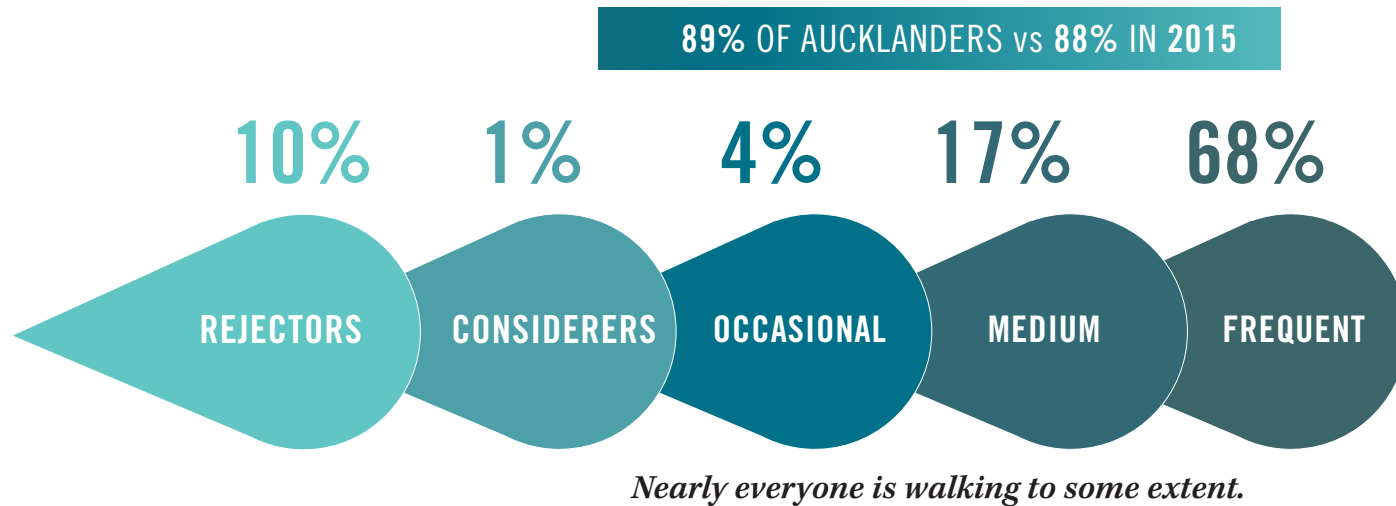
Perceptions of cycling in the city are changing for the better

The work that has been conducted to date around improving cycling infrastructure, and then driving strong awareness of it, is playing a key role in improving perceptions.

As a result, we are seeing greater confidence in cycling and key changes in cycling behaviour; more people are cycling in general, people are cycling more frequently, and more people are doing the key point-to-point journeys we want them to.

Whilst there is still significant work to do, we are moving perceptions and behaviour in the right direction. There is a strong opportunity to continue to build on this momentum at a time when Aucklanders are increasingly looking for alternative transport solutions.

Walking has a different challenge – it's less about penetration



THE CHALLENGE FOR WALKING IS

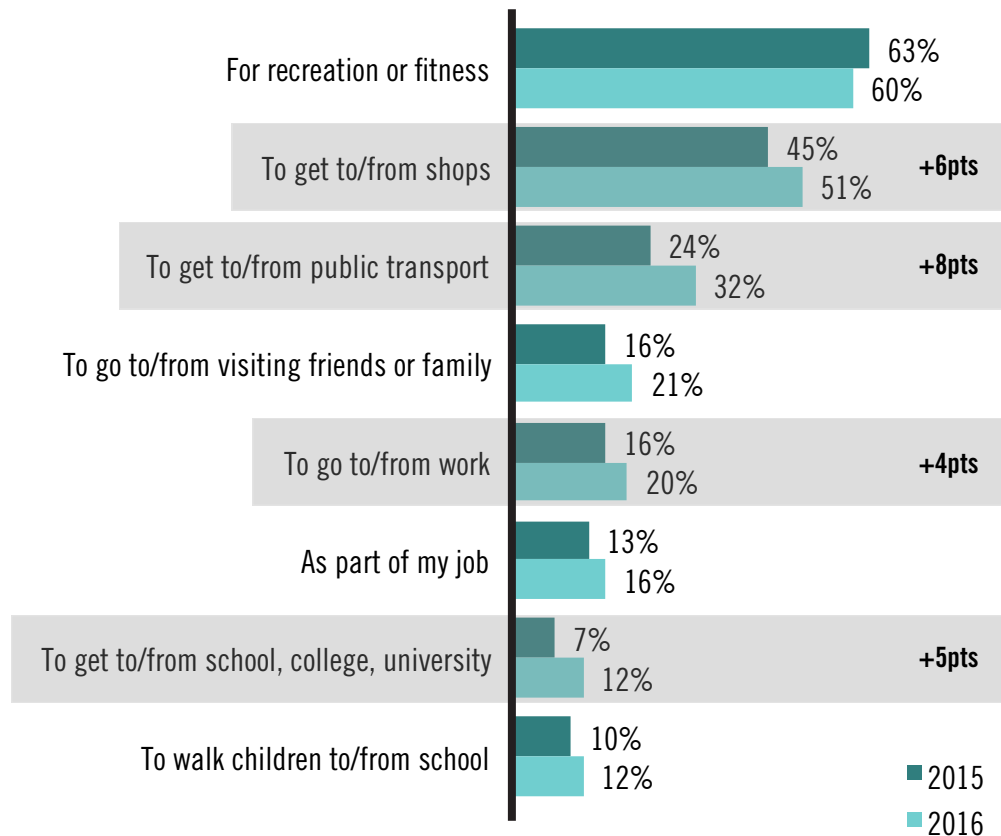
GETTING PEOPLE OUT OF THEIR CARS AND REPLACING THESE TRIPS WITH WALKING

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

We are also seeing more people engaged in walking for point-to-point journeys this year



% of walkers doing these occasions



58% IN 2015 >> 68% IN 2016

» *The opportunity is to continue to grow the number of people walking for the key point-to-point journeys – and also to increase how frequently they do them.*

B3. What types of trips do you walk for? By walks, we mean walks of ten minutes or longer at a time. Walkers (n=1,052)

Auckland has seen incremental growth in active modes of transport year on year

There has been a significant increase in the number of cyclists.

The proportion of people walking at all is steady year on year.

45,600 NEW CYCLISTS
OVERALL

11,400 NEW WALKERS
OVERALL

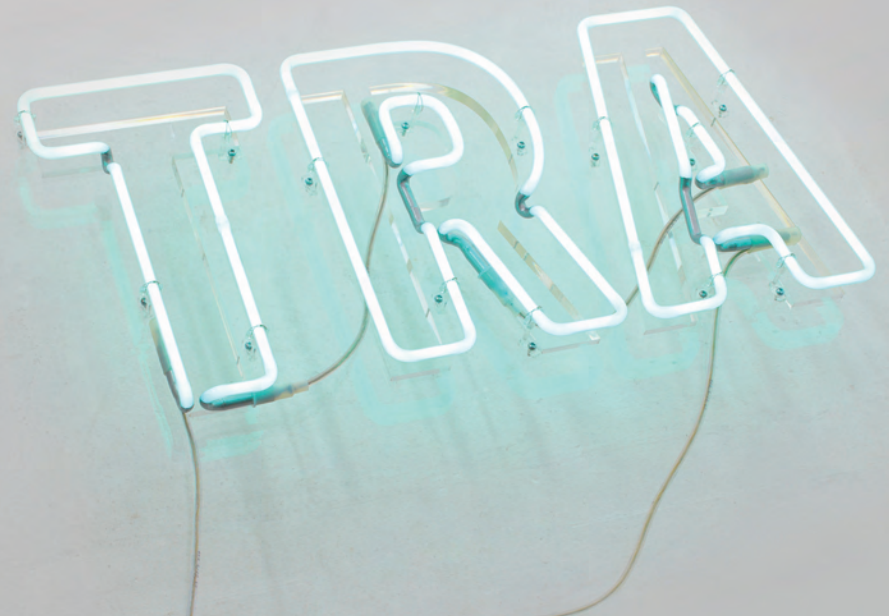
28,000 NEW CYCLISTS
DOING POINT-TO-POINT TRIPS

108,000 WALKERS
NOW DOING POINT-TO-POINT TRIPS

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

.02

A deeper understanding
of how Aucklanders travel



Gaining a deeper understanding of Aucklanders' travel behaviour

This year the survey looks to expand on current knowledge and delve deeper into Aucklanders' travel behaviour.

SPECIFICALLY:



Travel patterns are based on a multitude of journey types and travel modes

AUCKLANDERS ARE MAKING 24.4 TRIPS PER WEEK ON AVERAGE

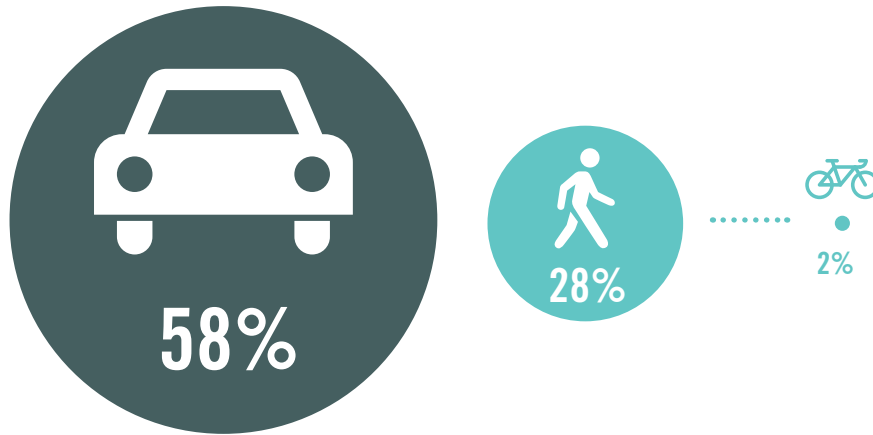
Volume of Trips (all Aucklanders)

	Car	Walking	Bus	Train	Cycling	Motor bike	Ferry	TOTAL
To get to/from work	22%	10%	10%	10%	0%	0%	0%	22%
To get to/from shops	20%	10%	10%	0%	0%	0%	0%	20%
To get somewhere else	16%	10%	10%	0%	0%	0%	0%	16%
To get to/from visiting friends or family	10%	10%	0%	0%	0%	0%	0%	10%
To get to/from public transport	11%	10%	10%	0%	0%	10%	0%	11%
As part of my job	8%	10%	0%	0%	0%	0%	0%	8%
To get to/from school, college, university	7%	10%	10%	10%	0%	0%	0%	7%
To take children to/from school or day-care	7%	10%	0%	0%	0%	0%	0%	7%
TOTAL	58%	28%	7%	3%	2%	2%	1%	100%

Q2. Thinking about the past week, how many times did you use each mode of transport when travelling for these occasions? Based on average trips made in past week. Total sample (n=1,178)

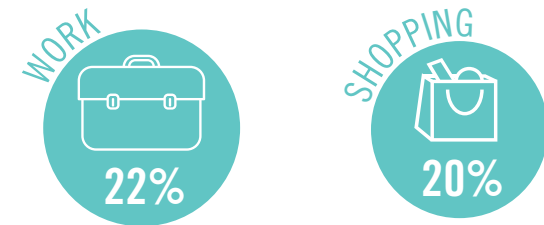
A valuable perspective of travel behaviour is gained by looking at trip volume

Top travel modes by trip volume



» *The key challenge is to reduce pressure on the roading network. This will come from targeting car journeys.*

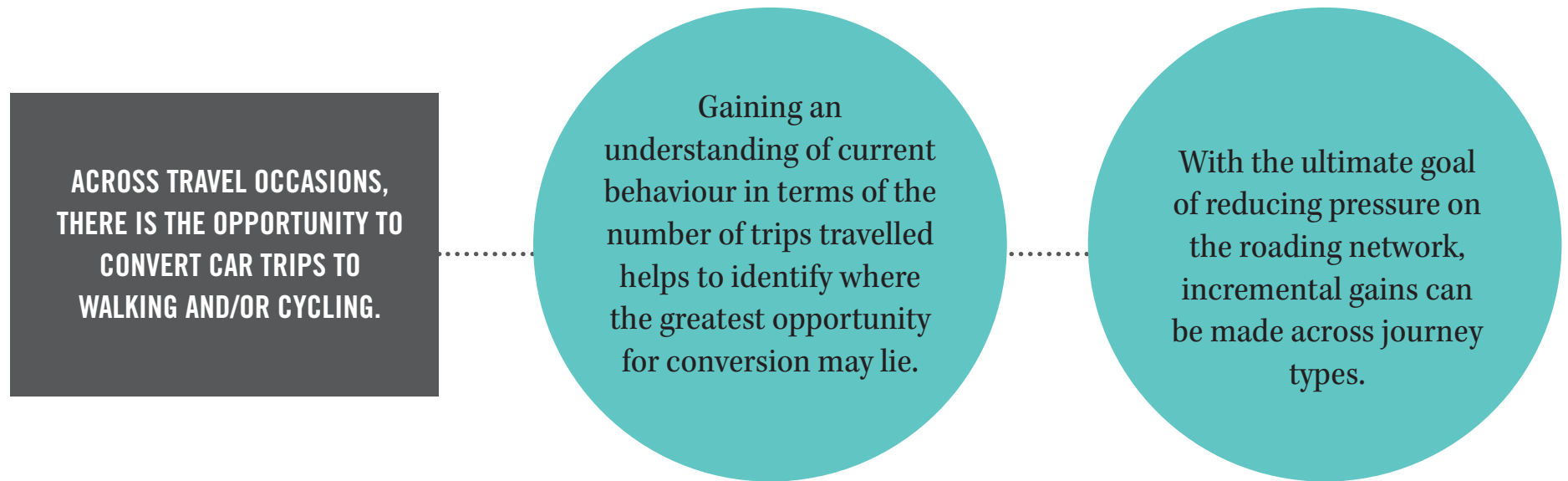
Top journey types by trip volume



» *We will make the biggest difference targeting the journey types that are done most often.*

Q2. Thinking about the past week, how many times did you use each mode of transport when travelling for these occasions? Based on average trips made in past week. Total sample (n=1,178)

This provides direction on where to focus by sizing the overall opportunity



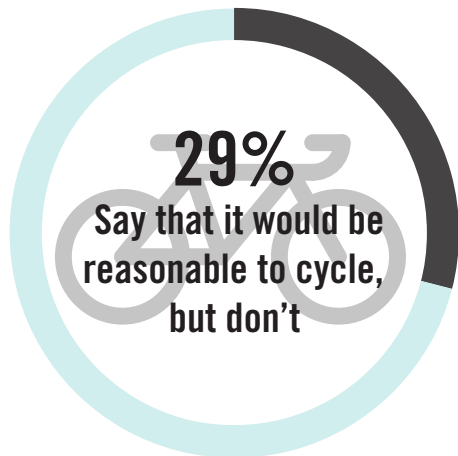
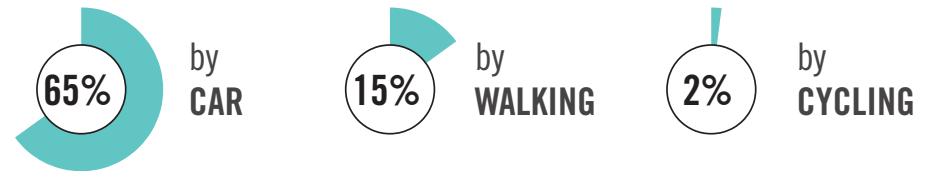
TWO KEY OPPORTUNITIES ARE IDENTIFIED FOR AUCKLAND TRANSPORT.

OPPORTUNITY 1 Travelling to/from WORK

% AUCKLANDERS:



% TRIPS:



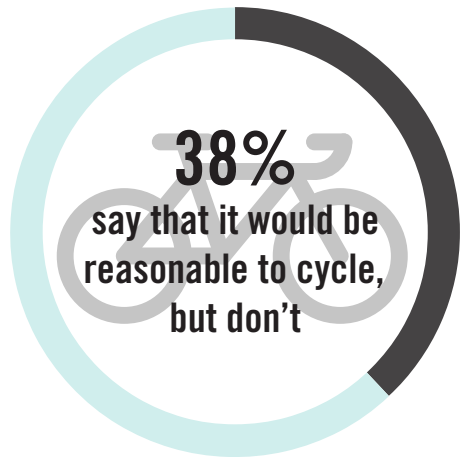
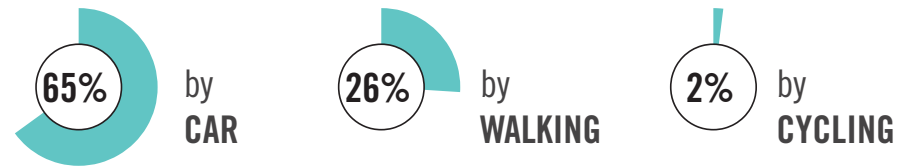
Cycling represents the greatest potential opportunity for growth in this space.

OPPORTUNITY 2 Travelling to/from SHOPS

% AUCKLANDERS:



% TRIPS:



The potential opportunity for cycling this journey appears strong. However, we know the barriers to cycling for this journey are also very strong.



This particular journey represents the strongest potential opportunity for walking.

IMPLICATION

To drive greater adoption of active modes,
we now have a place to focus



CYCLING
IS ABOUT THE
WORKING
OCCASION

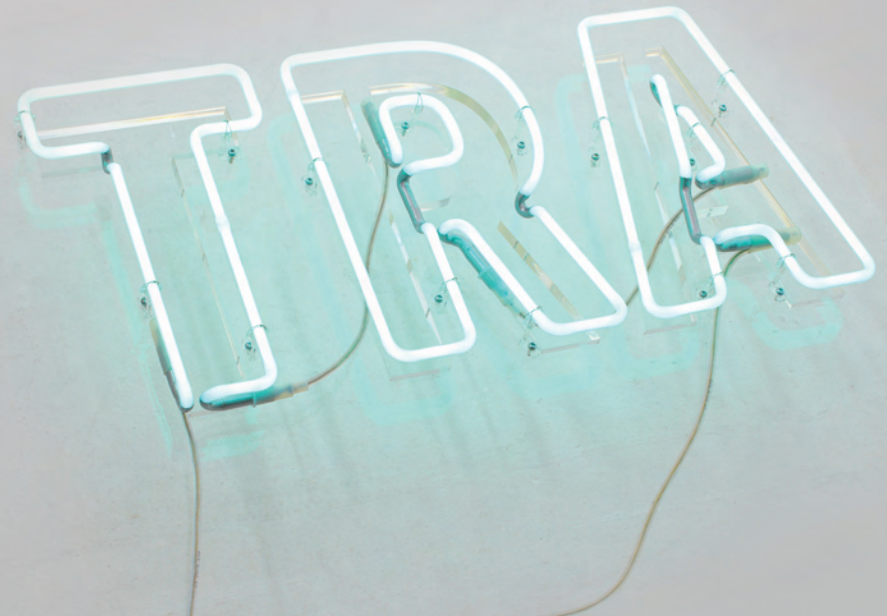


WALKING
IS ABOUT THE
SHOPPING
OCCASION

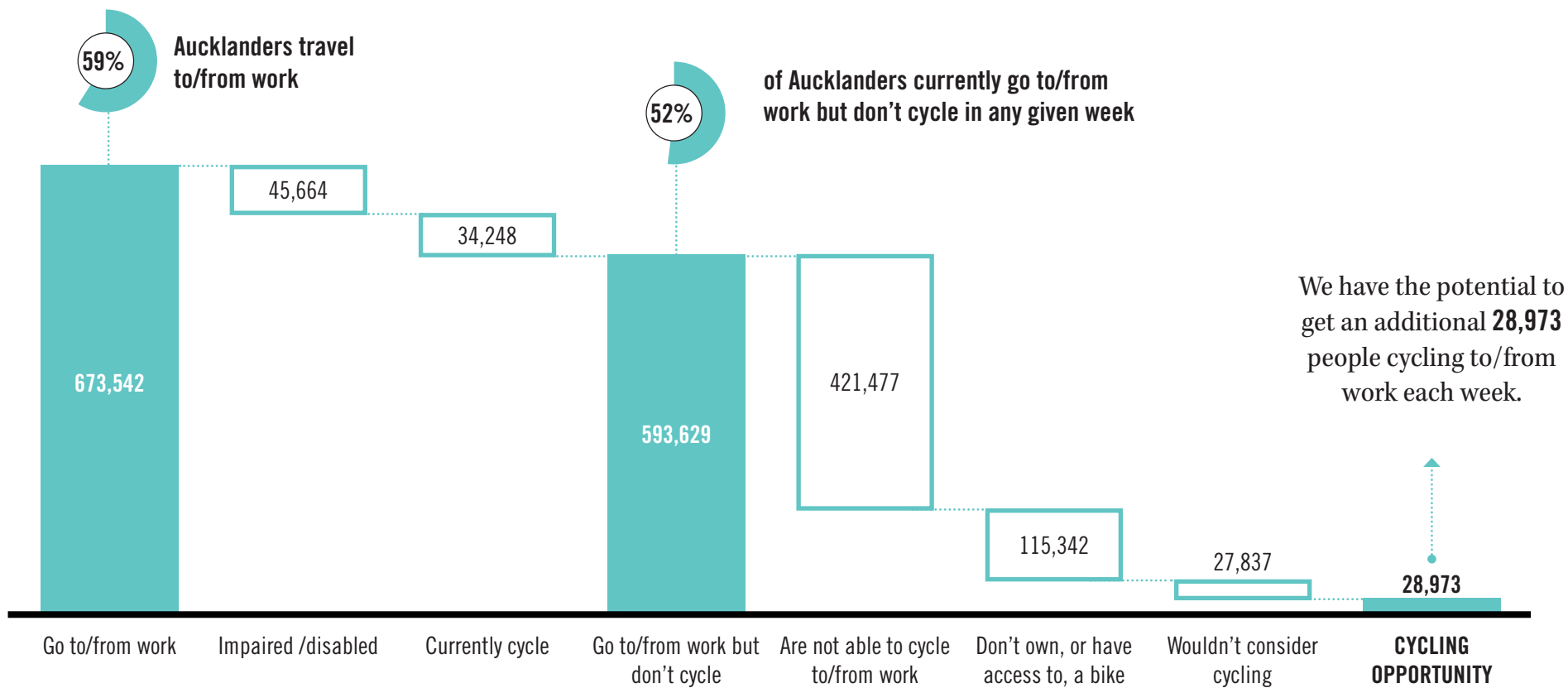


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Opportunities to drive
behaviour change

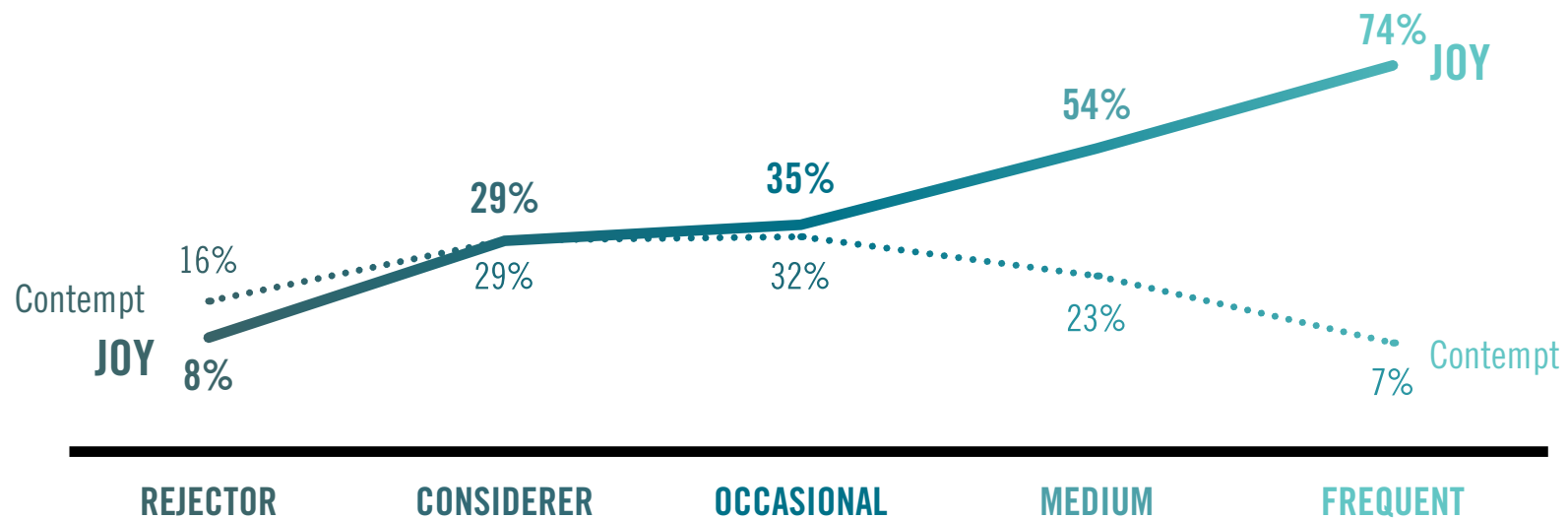


What could the opportunity for growth in **CYCLING TO/FROM WORK** look like?



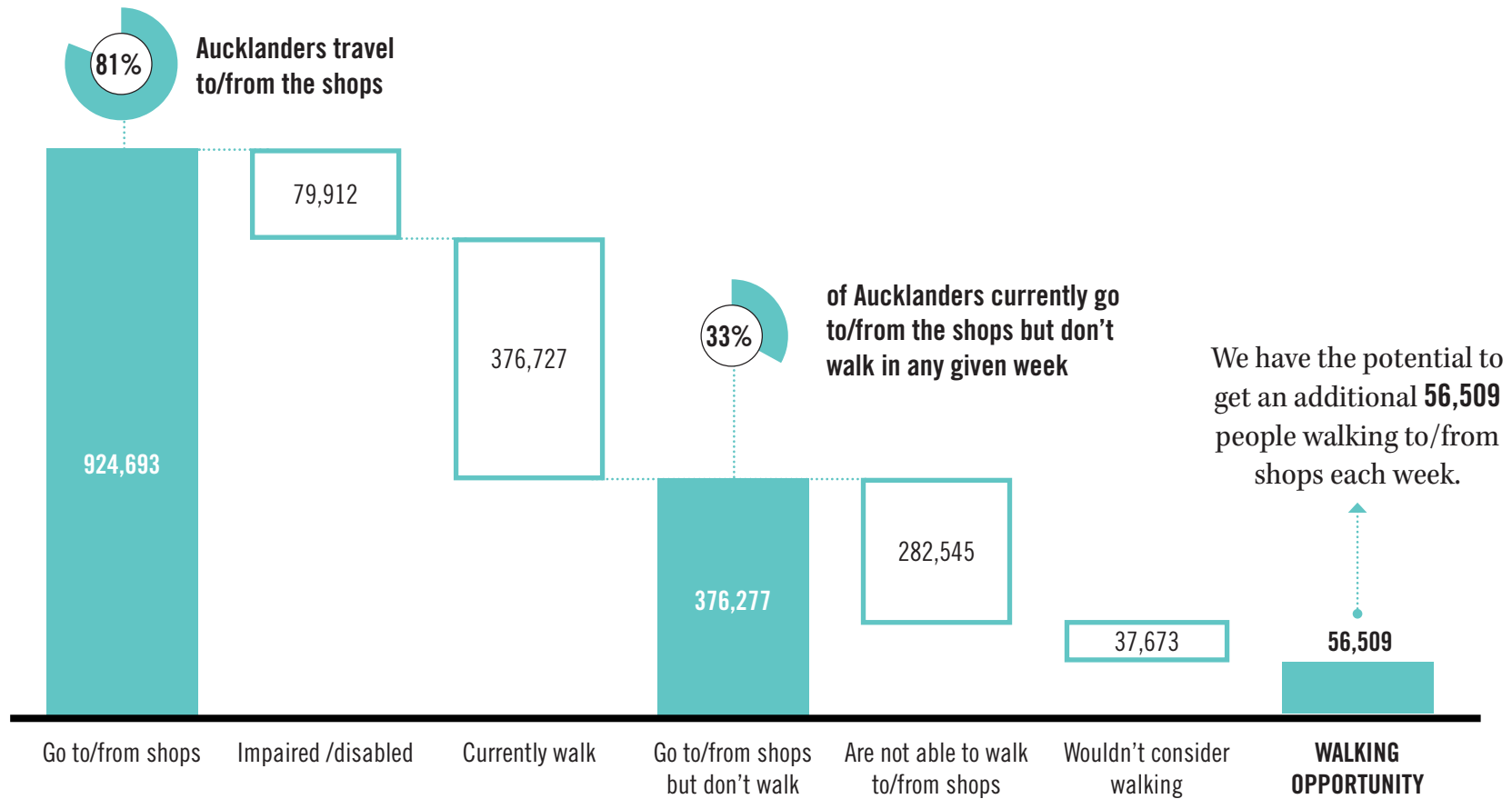
*Population extrapolation based on 2013 Census figures for Auckland's 15+ population.

There is overwhelming evidence that emotion is the key driver of human behaviour



AT1. Pick the facial expression that best depicts how you feel about each of the different modes of transport – Cycling (n=1,178)

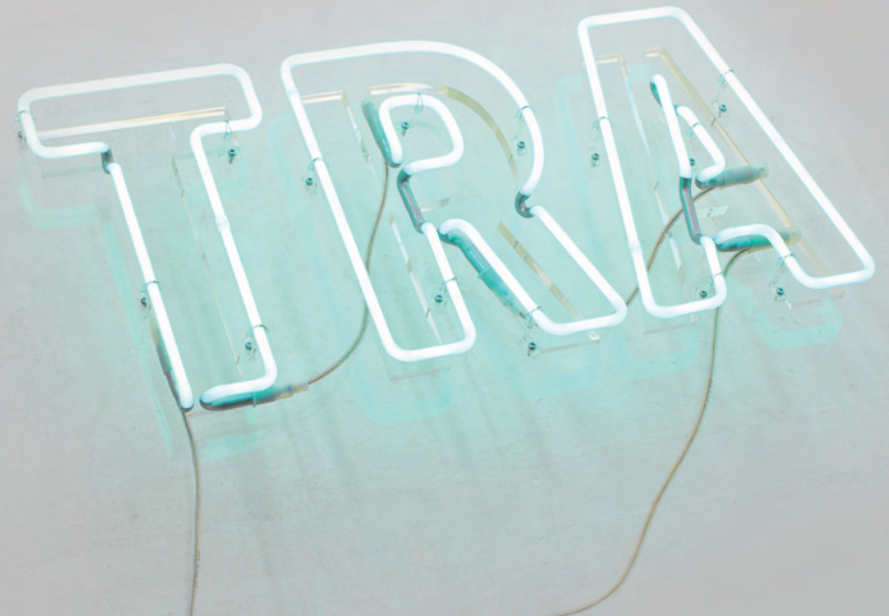
What could the opportunity for growth in **WALKING TO/FROM SHOPS** look like?



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

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Bringing it all together



THERE HAS BEEN POSITIVE CHANGE IN PERCEPTION AND BEHAVIOUR

THERE HAVE BEEN VERY POSITIVE MOVEMENTS IN PERCEPTIONS OF CYCLING AND WALKING IN AUCKLAND, SPECIFICALLY:

- CYCLE WAYS & INFRASTRUCTURE
- CONFIDENCE

ALL RESULTING IN A POSITIVE SHIFT IN POINT-TO-POINT JOURNEYS,

ADDING

28,000 NEW CYCLISTS
DOING POINT-TO-POINT TRIPS

AND

108,000 PEOPLE
WALKING
FOR THESE POINT-TO-POINT JOURNEYS

THERE ARE TWO KEY FOCUS AREAS WHICH WILL DRIVE FURTHER INCREMENTAL GAINS



**CYCLING
TO
WORK**



NEW OPPORTUNITY: 28,973 people



**WALKING
FOR THE
SHOPPING
OCCASIONS**



NEW OPPORTUNITY: 56,509 people

THERE ARE TWO CORE JOBS FOR AUCKLAND TRANSPORT TO DO

01

Facilitate the
removal of perceived
FUNCTIONAL BARRIERS
to encourage trial

02

Promoting and reinforcing
the **EMOTIONAL REWARDS**
of cycling and walking to
work to encourage repeat
behaviour

Thanks for reading



APPENDIX



AT Adoption Framework – CYCLING

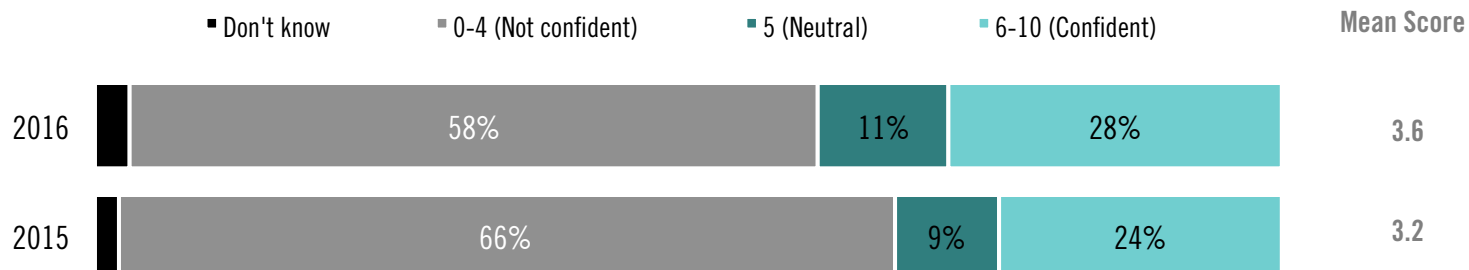
		HOW OFTEN DO YOU CYCLE?			
		Never /Virtually never	Occasionally (less than monthly)	Medium (monthly to weekly)	Frequently (two days per week or more)
WHICH DESCRIBES YOUR PREFERENCE?	Would like to cycle less/only if I have to	47% Rejector	3% New and Occasional at risk	3% Medium at risk	1% Regular at risk
	Happy with my use of bicycle		3% New and Occasional	5% Medium	3% Regular
	Would like to cycle more	21% Considerer	5% New and Occasional – Opportunity	5% Medium – Opportunity	2% Regular – Opportunity

AT Adoption Framework – WALKING

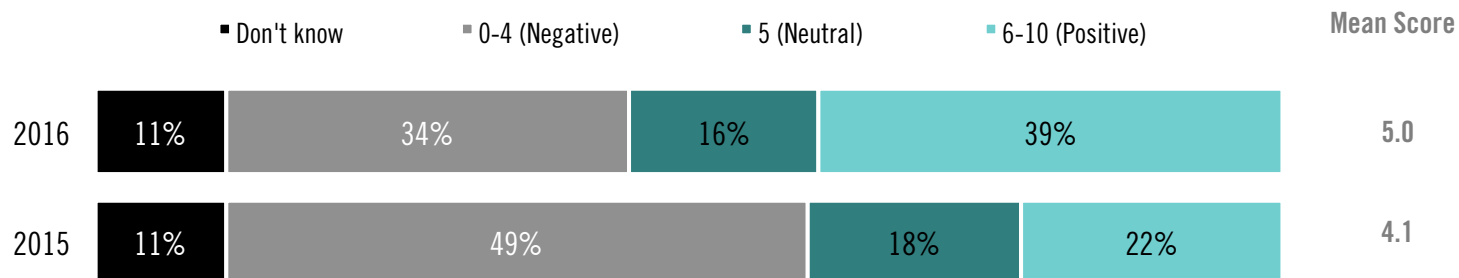
		HOW OFTEN DO YOU WALK FOR 10 MINS OR MORE?			
		Never /Virtually never	Occasionally (less than monthly)	Medium (monthly to weekly)	Frequently (two days per week or more)
WHICH DESCRIBES YOUR PREFERENCE?	Would like to travel this way less/only if I have to	10% Rejector	4% New and Occasional at risk	4% Medium at risk	7% Regular at risk
	Happy with my use of this travel mode		4% New and Occasional	6% Medium	33% Regular
	Would like to travel this way more	1% Considerer	6% New and Occasional – Opportunity	7% Medium – Opportunity	28% Regular – Opportunity

Key Measures – CYCLING

CONFIDENCE IN CYCLING

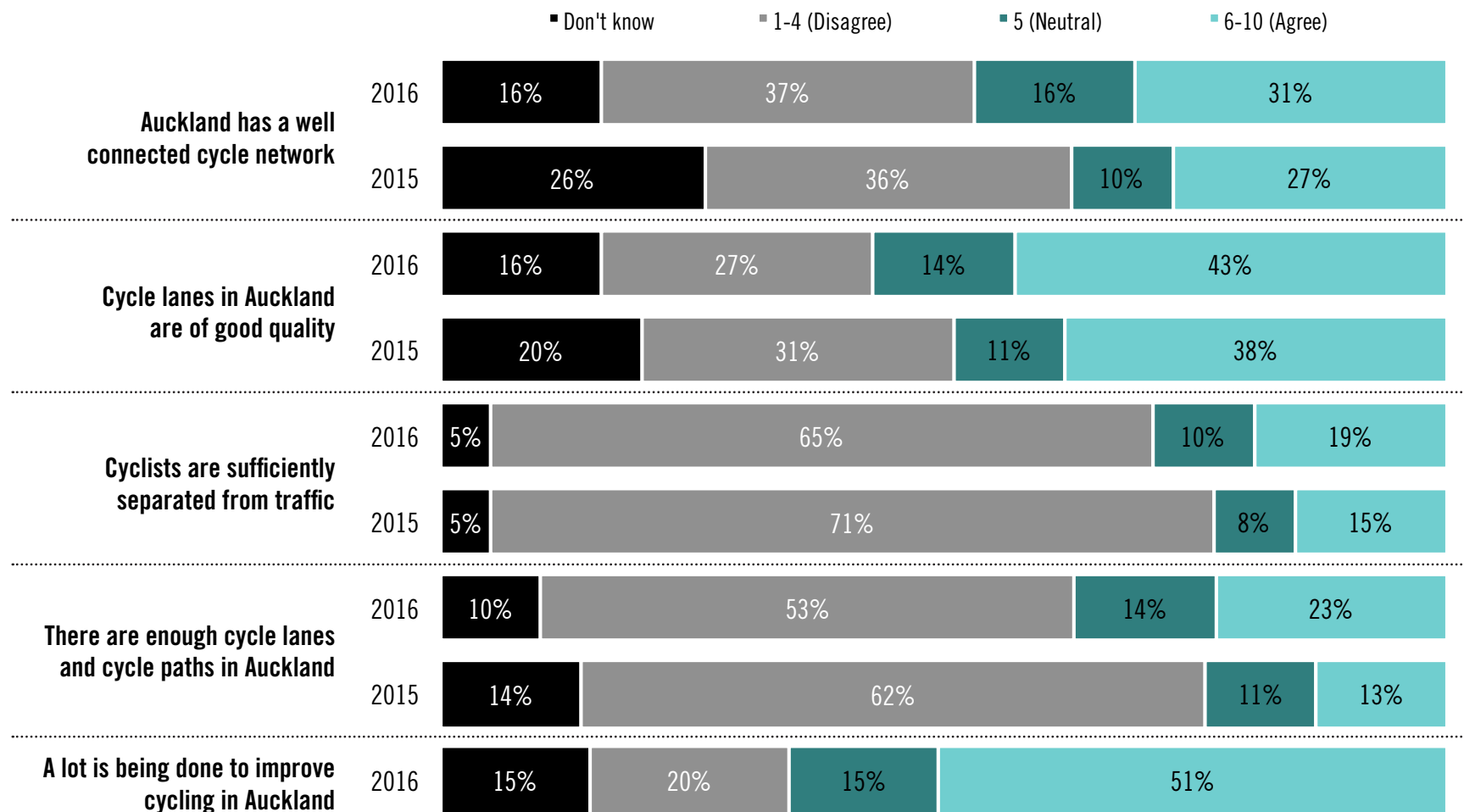


OVERALL STATE OF CYCLING



Q24. Overall, how do you view the current state of cycling in Auckland? Able bodied (n=1,046)
 A5a. In general, how confident are you/would you be in riding a bicycle in the Auckland area?
 Able bodied (n=1,046)

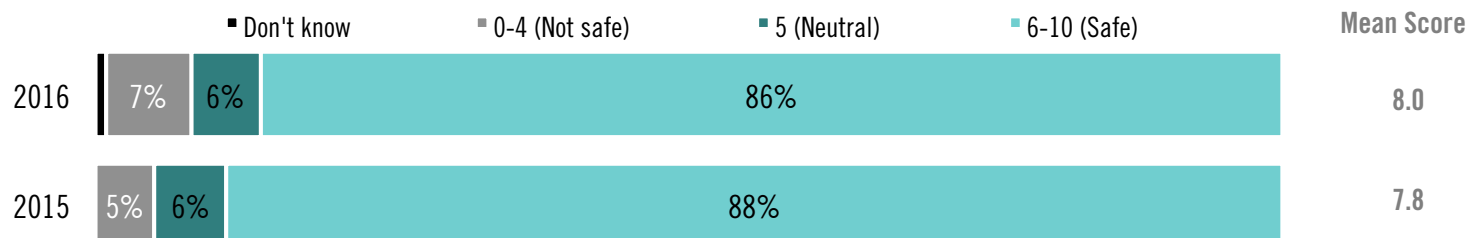
Attitudes to Cycling Infrastructure



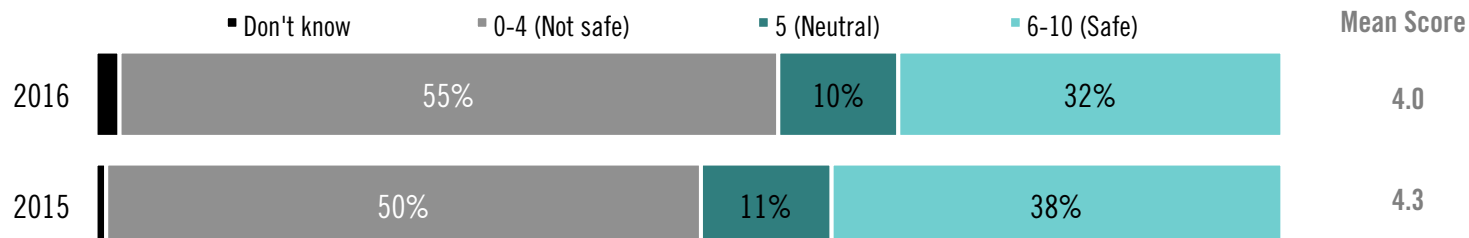
A26. How strongly do you agree, or disagree, with each of the following statements? Able bodied (n=1,046)

Key Measures – WALKING

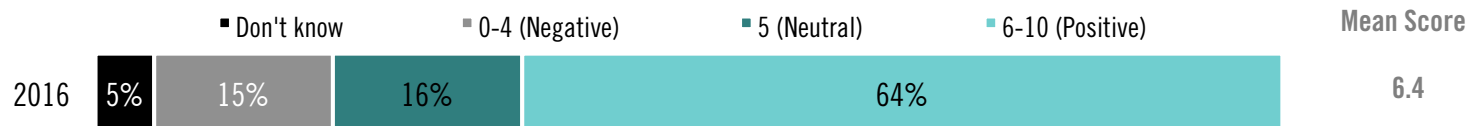
SAFETY – DAY



SAFETY – NIGHT



OVERALL STATE OF WALKING

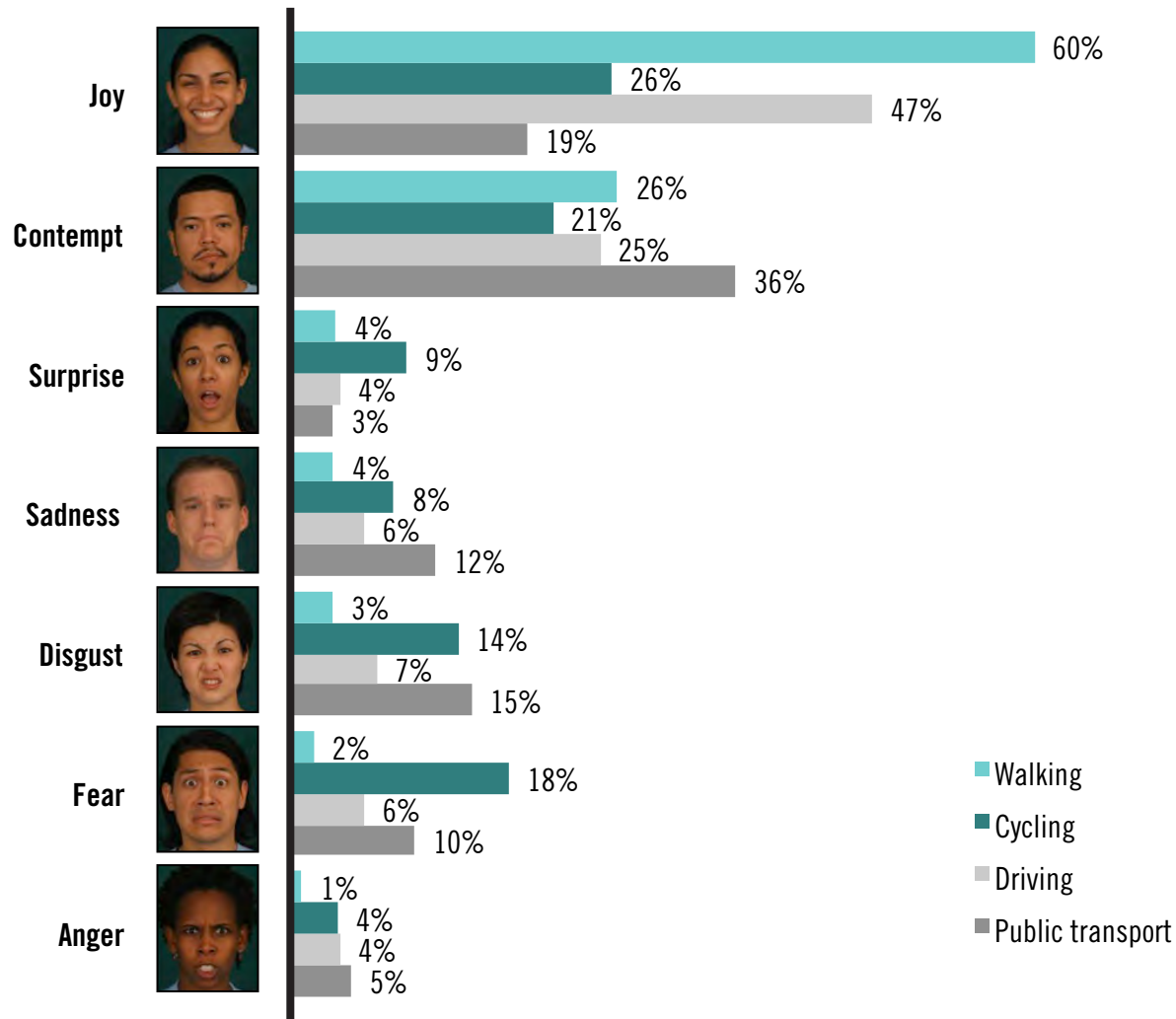


B14/B15 In general, how safe do you feel / would you feel walking during the daytime/night time?

Able bodied (n=1,046)

Q24. Overall, how do you view the current state of walking in Auckland? (n=1,117)

Emotional Response to Modes of Transport



Associations with Travel Modes

IMPLICIT ASSOCIATIONS

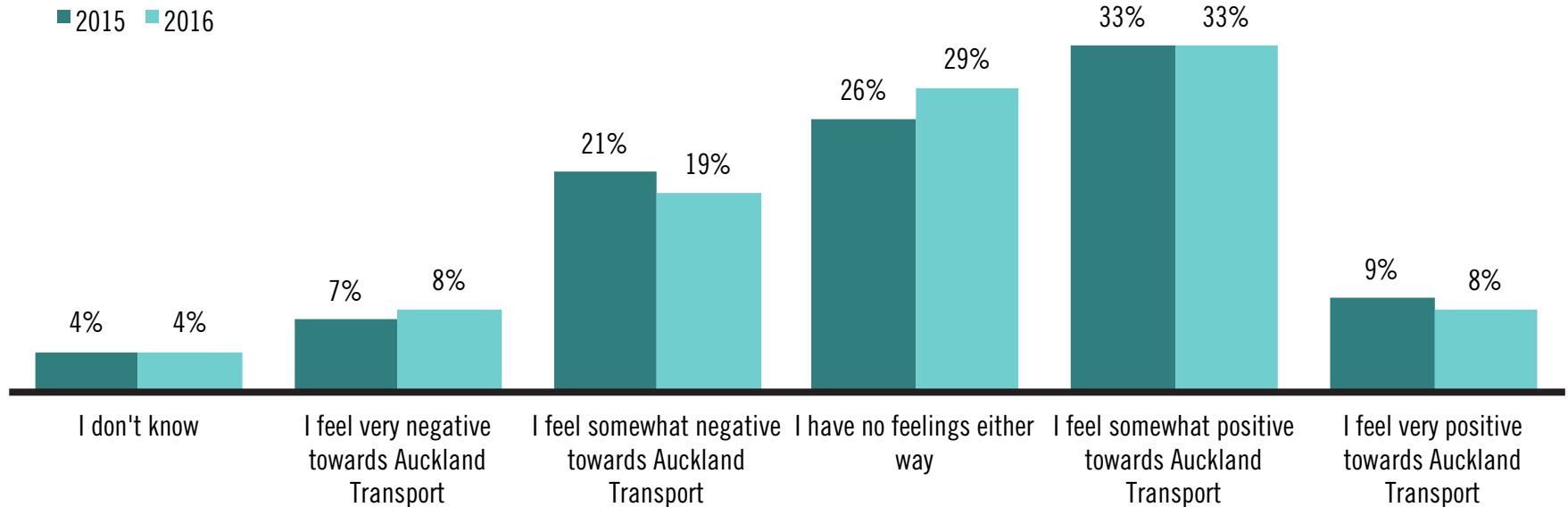
% Endorsement for Yes / No across attributes

	DRIVING		WALKING		CYCLING		PUBLIC TRANSPORT	
	YES	NO	YES	NO	YES	NO	YES	NO
Social	48%	38%	67%	20%	51%	35%	56%	30%
Fast	74%	15%	42%	44%	47%	39%	40%	46%
Convenient	76%	12%	65%	23%	52%	33%	50%	34%
Enjoyable	67%	21%	78%	13%	59%	27%	41%	46%
Difficult	32%	49%	23%	60%	41%	41%	39%	41%
Healthy	37%	47%	82%	9%	80%	12%	42%	41%
Expensive	60%	25%	17%	69%	24%	59%	51%	32%
Safe	67%	21%	67%	20%	40%	48%	61%	24%
Socially responsible	42%	38%	73%	12%	59%	22%	61%	20%
Brave	44%	40%	47%	37%	58%	27%	35%	49%
Inconsiderate	27%	51%	16%	65%	27%	51%	25%	51%
Obstructive	32%	50%	19%	65%	31%	51%	30%	50%

Base: Total Sample (n=1178)

Table displays % endorsement for each attribute, for each travel mode.

Perceptions of Auckland Transport



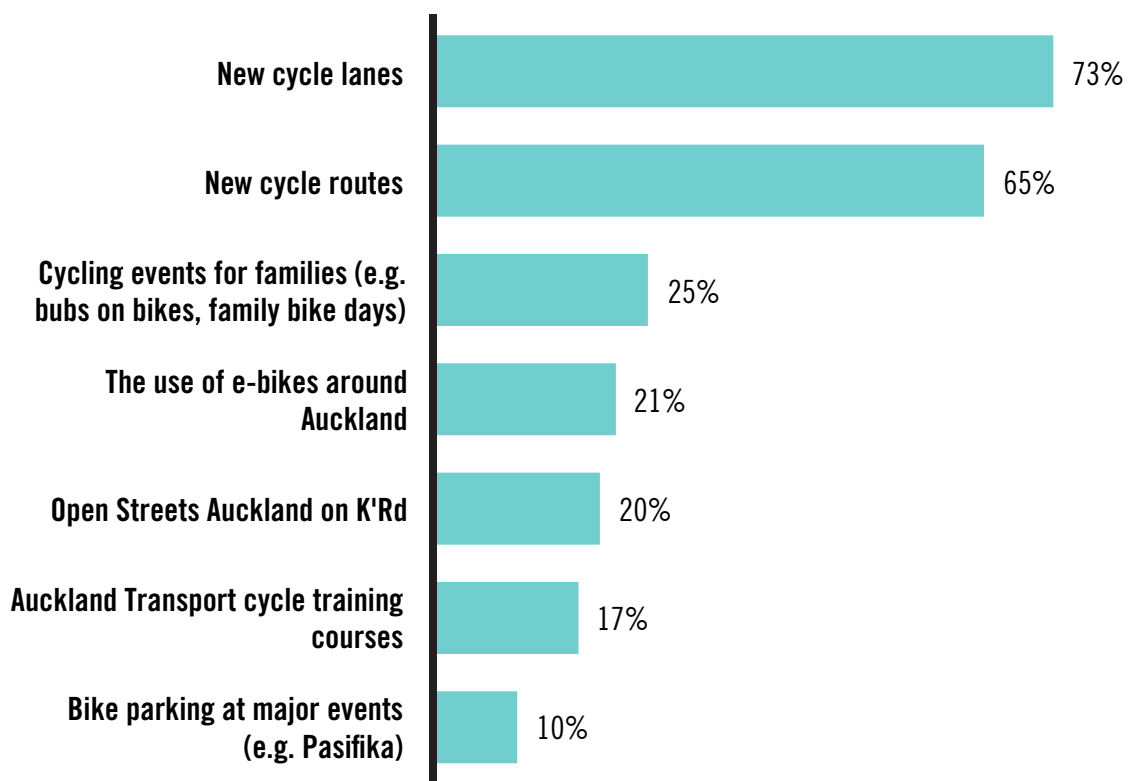
B21 Thinking about everything you have seen, read or heard about Auckland Transport, what are your overall perceptions of Auckland Transport? Total sample (n=1,178)

Awareness of Auckland Transport Activity

34%

of Aucklanders have seen, read or heard about Auckland Transport and the activity they are doing around walking and cycling in the city.

What activities are they aware of?



Q16 Have you seen, read or heard anything about Auckland Transport and the activity they are doing around walking and cycling in the city? (n=1,178)

Q17 And what have you seen, read or heard about Auckland Transport? (n=401)