

Measuring and growing active modes of transport in Auckland

AUCKLAND TRANSPORT

TRA

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=1,459 Aucklanders



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



Including a booster of those that cycle at least once a week and a booster of residents from inner city suburbs to ensure a robust sample size



With interviewing completed 5th-20th April 2018

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Overall state
of walking
and cycling in
Auckland

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What's
happening with
cycling

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How have
Aucklanders
attitudes &
perceptions
towards cycling
changed?

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What's
happening with
walking

Over the last year there has been a lot of activity in Auckland around transport

Let's take a look into how this activity has had an impact on Aucklanders behaviour and perceptions of cycling and walking in our city...



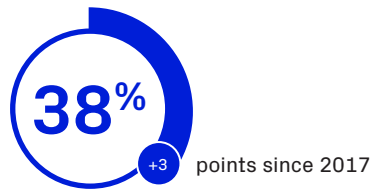


Overall state of cycling and walking in Auckland

TRA

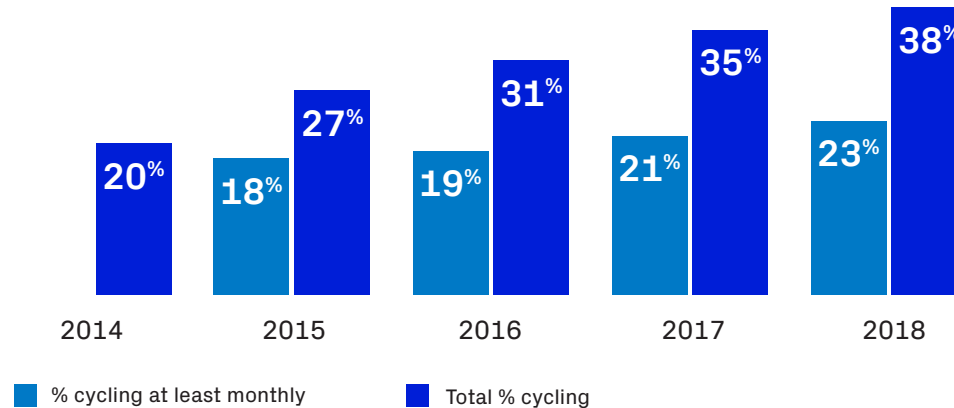


Aucklanders are continuing to cycle in greater numbers



- ▶ The proportion of Aucklanders who are cycling has increased by 3% (Up 7 points on 2016 and 18 points since 2014)
- ▶ There continues to be incremental gains in the proportion of people riding bikes at least monthly in Auckland.

CYCLING BEHAVIOUR (% OF AUCKLANDERS)



In 2018, the total number of cyclists is ~518,600 whilst the total number of people cycling at least monthly is ~312,900.

This is an increase of ~52,800 new cyclists in 2018.*

*Using an average growth of 3.1% from 2013 – 2017 to calculate 2018 pop estimate.
<http://nzdotstat.stats.govt.nz/WBOS/Index.aspx?DataSetCode=TABLECODE7563#>

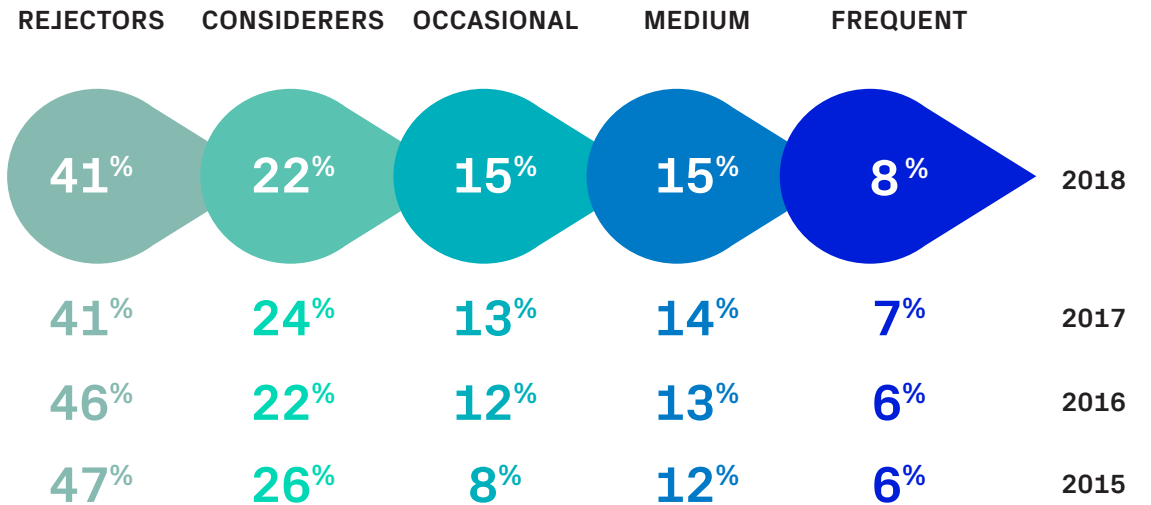
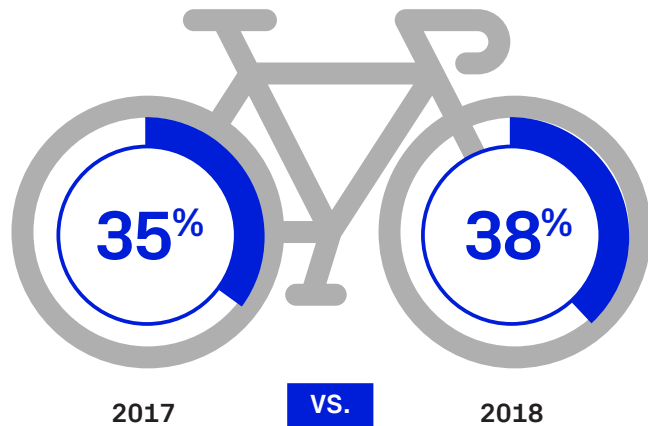
A6 - On average, how often do you do each of the following for any reason (Cycling)?
Medium (weekly-monthly). Frequent (twice a week or more often). Sample size 2018 N=1,459



As incremental gains across the cycling adoption framework persist

We are effectively converting Aucklanders from thinking about cycling to actually cycling occasionally. Since 2015, we have seen a 7pt increase in Aucklanders cycling occasionally.

AUCKLANDERS CYCLING



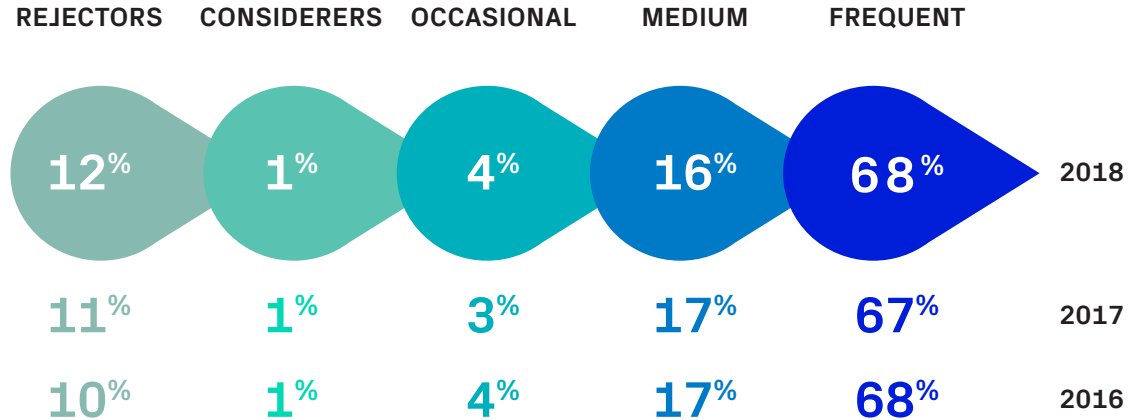
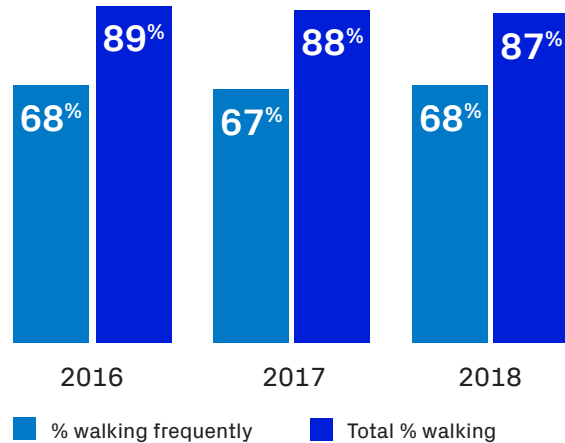
A6. Rejectors (unable or never cycle and wouldn't consider). Considerer (Never cycle but would consider). Occasional (less than monthly). Medium at least (weekly-monthly). Frequent (twice a week or more). Sample size 2018 N=1,459



On the other hand, walking behaviour across Auckland remains relatively consistent

Aucklanders walking 10+ minutes twice a week or more remains relatively stable year on year, however due to the sheer size of the population walking, and the population growth – we are still seeing growth in actual numbers of people walking.

WALKING BEHAVIOUR (% OF AUCKLANDERS)



People >55s less likely to be frequent walkers declining from 74% in 2016 – 72% 2017 & 71% 2018

In 2018, the total number of walkers doing 10min trips is ~1,201,000 whilst the total number of frequent walkers is ~930,000. This is an increase of ~29,600 new walkers in 2018.*

A6. Rejectors (unable or never walk and wouldn't consider). Considerer (Never walk but would consider). Occasional (less than monthly). Medium (monthly or weekly). Frequent (twice a week or more). Sample size 2018 N=1,459

*Using an average growth of 3.1% from 2013 – 2017 to calculate 2018 pop estimate. <http://nzdotstat.stats.govt.nz/WBOS/Index.aspx?DataSetCode=TABLECODE7563#>

Improvements have been felt across the entire transport network

Aucklanders are using their cars less regularly (once a week or more often) than they have in the past (down 6pts in the last 2 years). This has largely been in favour of public transport, but will also be contributing to the growth we have seen in cycling.

MODE OF TRANSPORT REGULARLY USED (ONCE A WEEK/MORE OFTEN)

	2016	2017	2018
Private or company car / van / truck	72%	69%	▼ 66%
Any Public Transport	30%	30%	▲ 32%

A2 – And which of the following do you regularly use, e.g. once a week or more often? This can be for any reason, including work, sport or recreation.
2018 n=1,459; 2017 n=1,477; 2016 n=1, 178

As Aucklanders are becoming less reliant on their cars, active modes are gaining critical mass

Although Aucklanders are still strongly wedded to their cars, they are becoming less reliant on them for regular use, leading to incremental growth in the use of active modes and public transport since 2016.

We are effectively moving Aucklanders up the cycling adoption framework, with more people cycling, and cycling more frequently, than they did in 2016.

Let's take a look into who is cycling in Auckland...

IMPLICATION



Cyclists¹

~518,600

(~52,800 new cyclists)



Walkers¹

~1.2M

(~29,600 new walkers)

¹Using an average growth of 3.1% from 2013 - 2017 to calculate 2018 pop estimates

What's happening in cycling

2

TRA



Who is driving the increase in cyclists?

We are seeing a normalisation of cycling as more, and different groups of Aucklanders are cycling. Cycling behaviour is increasing amongst those who work, which is a critical driver of car replacement trips.

TOTAL CYCLING PENETRATION

	2016	2017	2018	Difference 2016 vs 2018
18-34s	42%	51%	50%	▲ 8%
Asian ethnicity	26%	28%	33%	▲ 7%
Working – singles/ couples without children	28%	31%	33%	▲ 5%

Families are also more likely to occasionally cycle than they have in the past.

Base size: Total Cyclists; 18-34s (n=525) Asian (n=353) SINKS/DINKS (n=363)

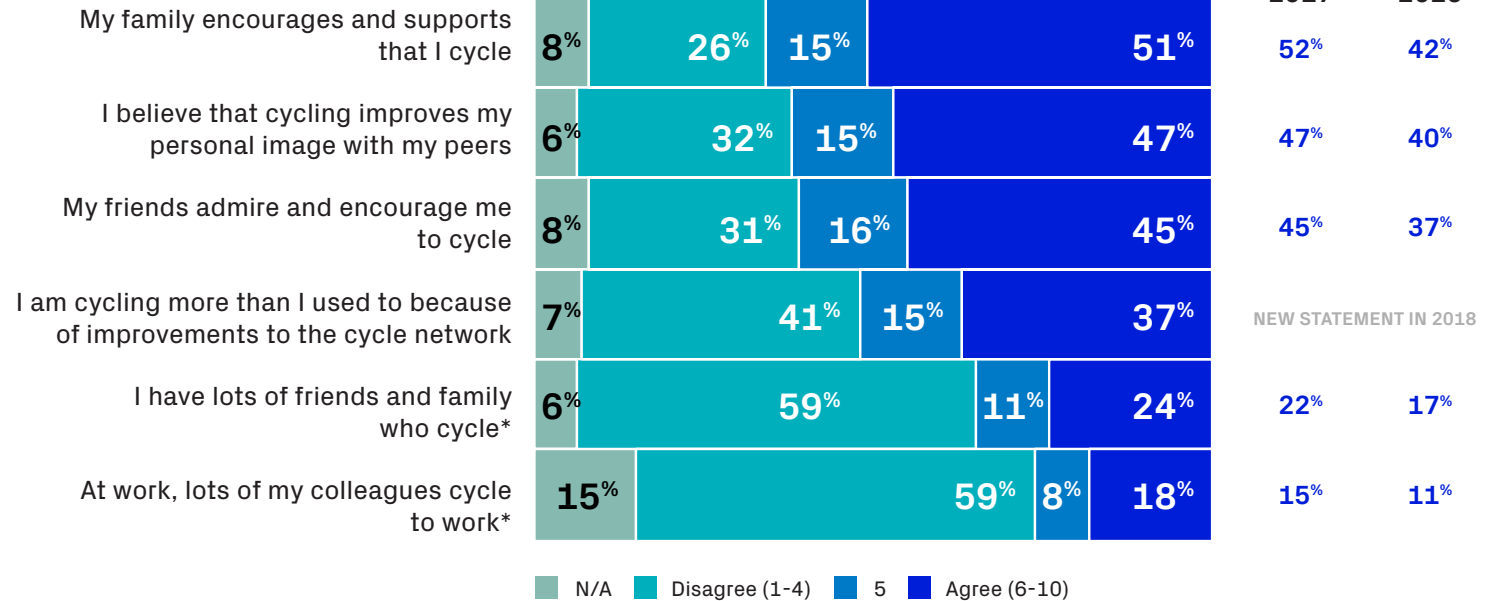




Continued social acceptance will also be contributing to normalisation

2018 CYCLING ATTITUDES

Support from friends and family and having people around you cycling is all resulting in the normalisation of cycling behaviour overall.



Q4a – And how strongly do you agree, or disagree with each of the following statements.
 Note: All statements asked of cyclists (2018, n=550); *Only statements non-cyclists answer (2018, n=909)



Cycling has increased in areas where investments into infrastructure have been made

- ▶ We have seen the greatest gains in **frequent** cycling amongst those living in central Auckland & west Auckland.
- ▶ Whilst the increases we see in total cyclists in north Auckland have been driven by those cycling occasionally.

TOTAL CYCLISTS BY REGION

	2016	2017	2018
Rodney	39%	37%	38%
North	30%	34%	42%
Central	34%	38%	43%
West	29%	29%	31%
East	31%	40%	44%
South	29%	34%	30%
Franklin	25%	35%	15%
TOTAL CYCLISTS	31%	35%	38%



Increase of those living in inner city suburbs cycling (2016, 36% 2017, 44% 2018, 46%)

Central Auckland increase in frequent cyclists 7% - 11% (2016 vs 2018)

West Auckland increase in frequent cyclists 4% - 9% (2016 vs 2018)

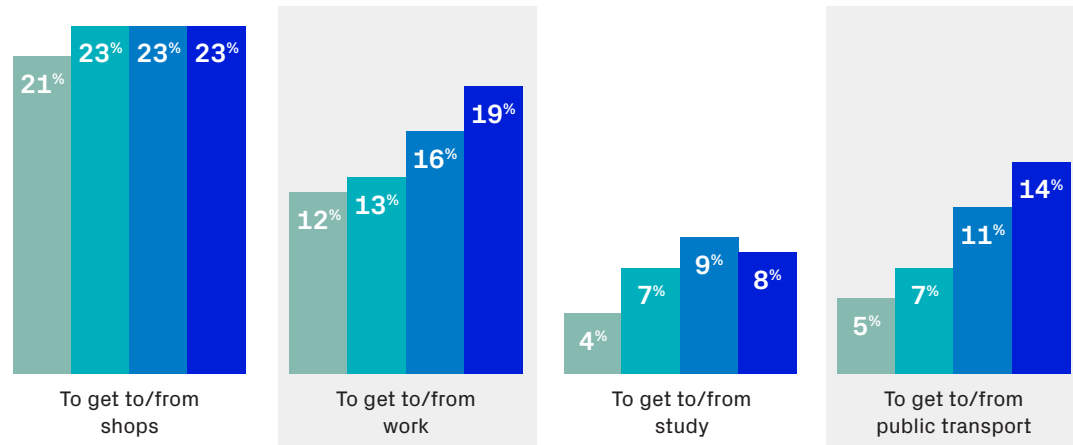
Base size: Rodney (n=115) North (n=260) Central (n=408) West (n=250) East (n=141) South (n=225) Franklin (n=56)*
Inner city suburbs (n=136) *Caution low base size



Cycling to/from work and public transport has seen the greatest year-on-year increases

Although there is a stabilisation of point-to-point journeys, behaviour continues to reflect AT's focus areas over the past 12 months (work and public transport).

% OF CYCLISTS DOING THESE OCCASIONS



Based on 2018 population estimates*

~122,000

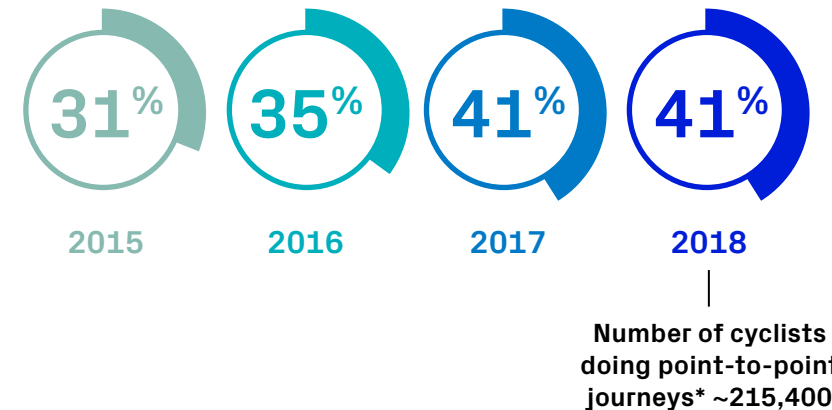
~99,000

~40,000

~74,500

A7: What types of trips do you bike for. Cyclists n=400-557
Population based on 2018 projections Auckland pop 15+ 1,274,700

When combined, since 2015, there is a 10% point increase in the proportion of Aucklanders cycling for these key point-to-point journeys, however year-on-year this has stabilised.



*Using an average growth of 3.1% from 2013 – 2017 to calculate 2018 pop estimate.
<http://nzdotstat.stats.govt.nz/WBOS/Index.aspx?DataSetCode=TABLECODE7563#>

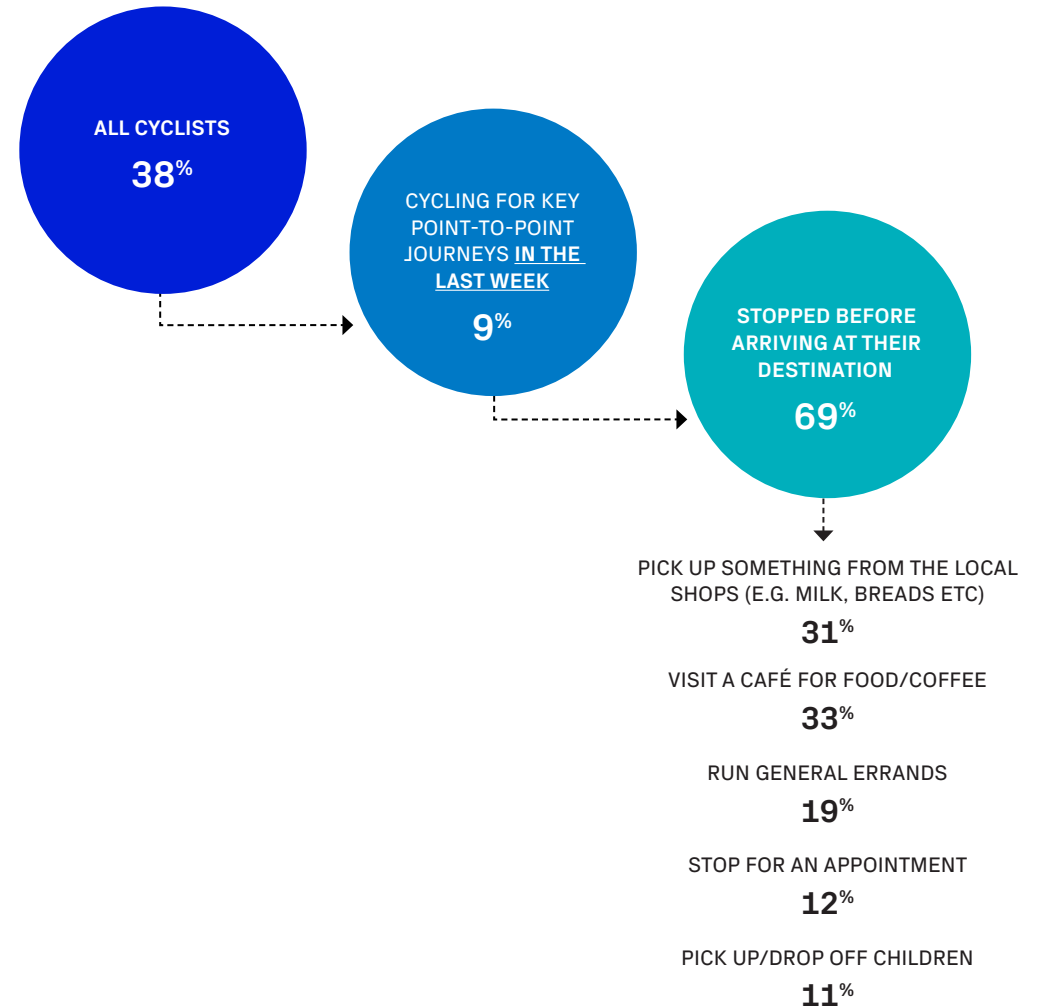


And they're doing multiple stops along their journey in the last week, supporting local businesses before arriving at their final destination



On average, 7 in 10 cyclists travelling key point-to-point journeys in the past week are stopping before getting to their destination.

Cyclists are supporting businesses in the community by picking up something from the shops visiting cafes for food/coffee or for general errands.

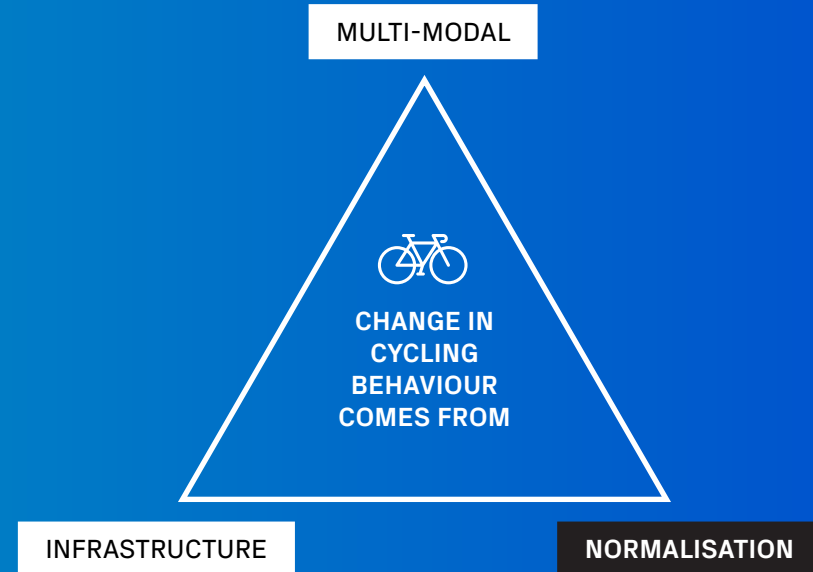


A34 – You mentioned you cycled [INSERT TRIPS] in the past week. Thinking about these journeys, did you stop to do any of the following before you arrived at your destination? Base: Those who cycled to shops/work/school/public transport in the last week n=139

Normalisation continues to drive behaviour change. Particularly in the west and central Auckland, infrastructure is driving frequency quite significantly.

With positive growth in cycling to work and public transport, these are not the only trips they are doing on their way. For the majority of these trips in the past week (~70%), cyclists are stopping to do something or pick something up.

IMPLICATION

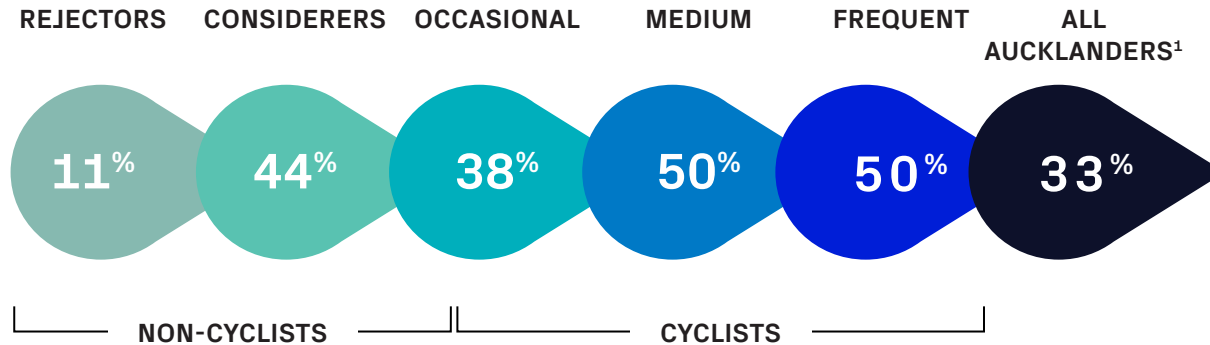




E-bikes have the potential to have an impact on behaviour change

A third¹ of Aucklanders would consider purchasing an e-bike in the future. Even non-cyclists would consider purchasing an e-bike.

CONSIDERATION OF PURCHASING AN E-BIKE IN THE NEXT 12 MONTHS



Although only a small proportion of Aucklanders currently own an e-bike, the consideration is significant.

51% of Aucklanders own a bike in general (~701,800*) and 3% (~41,000*) own an e-bike.



Who would consider buying an e-bike in the next 12 months?

- 25 – 34 years
- Live in central Auckland – particularly inner city suburbs
- Be of Asian ethnicity

A28a - And what type of bikes do you own? All Aucklanders (able bodied) n=1,309
 A28b - Thinking about electric bikes (e-bikes) right now, which of the following statements best describes you? Non-e-bike owners (N=419)
¹ 33% relates to non-e-bike owners
² Using an average growth of 3.1% from 2013 - 2017 to calculate 2018 pop estimates

IMPLICATION

E-bikes have a great opportunity to activate non-cyclists and to get current cyclists cycling more

Non-cyclists

Reduce functional (sweat, distance) and emotional (effort, ability, hills) barriers that currently prohibit uptake.

Current cyclists

Encourage a modal shift (open up new distances, increase ease of carrying) for point-to-point trips.



How have Aucklanders' attitudes and perceptions towards cycling changed?

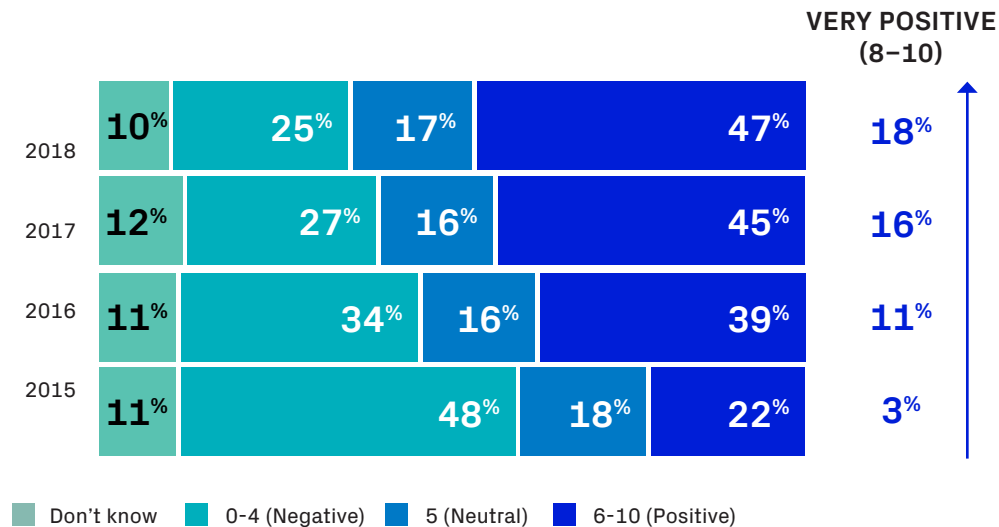
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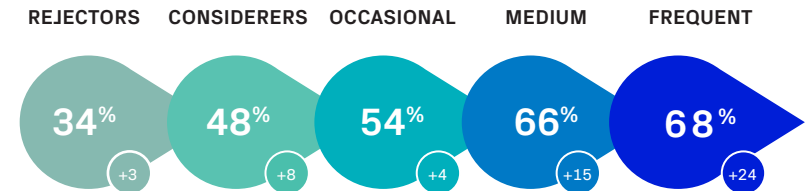
Perceptions of the overall state of cycling have continued to increase since 2015, with almost half of Aucklanders now viewing it positively

Almost 1 in 5 are very positive with the overall state of cycling in Auckland.

OVERALL STATE OF CYCLING



These increases have been seen across the adoption framework since 2016 (2018 figures with difference from 2016):



Increases have also been seen amongst (compared to 2016):

- Central Auckland 53% +9%
- West Auckland 50% +12%
- North Auckland 50% +13%

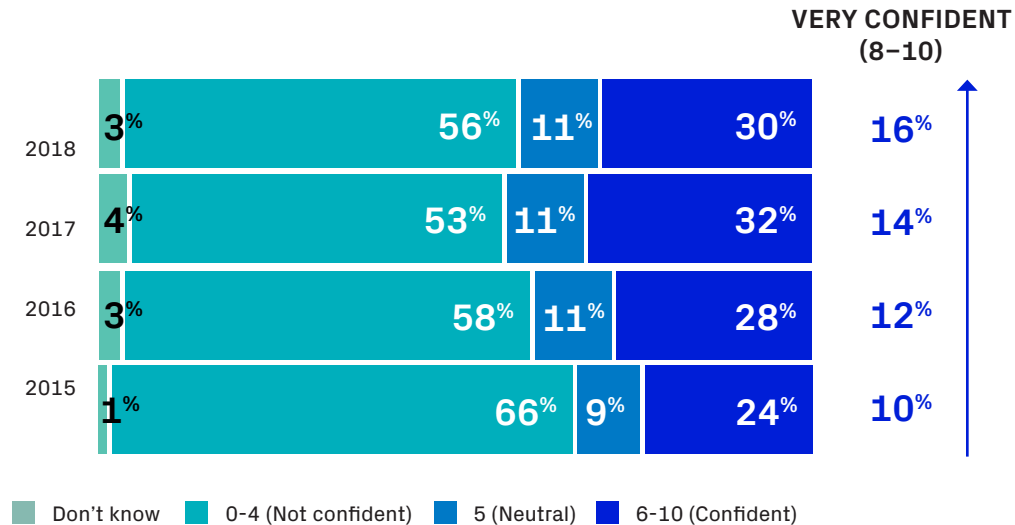
A24 – Overall, how do you view the current state of cycling in Auckland?
 Base: Able-bodied 2018 n=1,310, 2017 n=1,304; 2016 n=1,053



Confidence in cycling in Auckland has also improved

Although overall confidence in cycling has stabilised in the last year, we are still seeing incremental growth in Aucklanders feeling **very confident** cycling.

CONFIDENCE IN CYCLING IN AUCKLAND OVERALL



There has been an increase in confidence cycling amongst regular cyclists 40% +6% (2018 vs 2016)

We have also seen incremental increases across the regions, in particular (2018 increase vs 2016):

- Central Auckland - 2016 12%, 2017 16%, 2018 17%
- West Auckland - 2016 10%, 2017 13%, 2018 14%
- North Auckland - 2016 16%, 2017 16%, 2018 21%

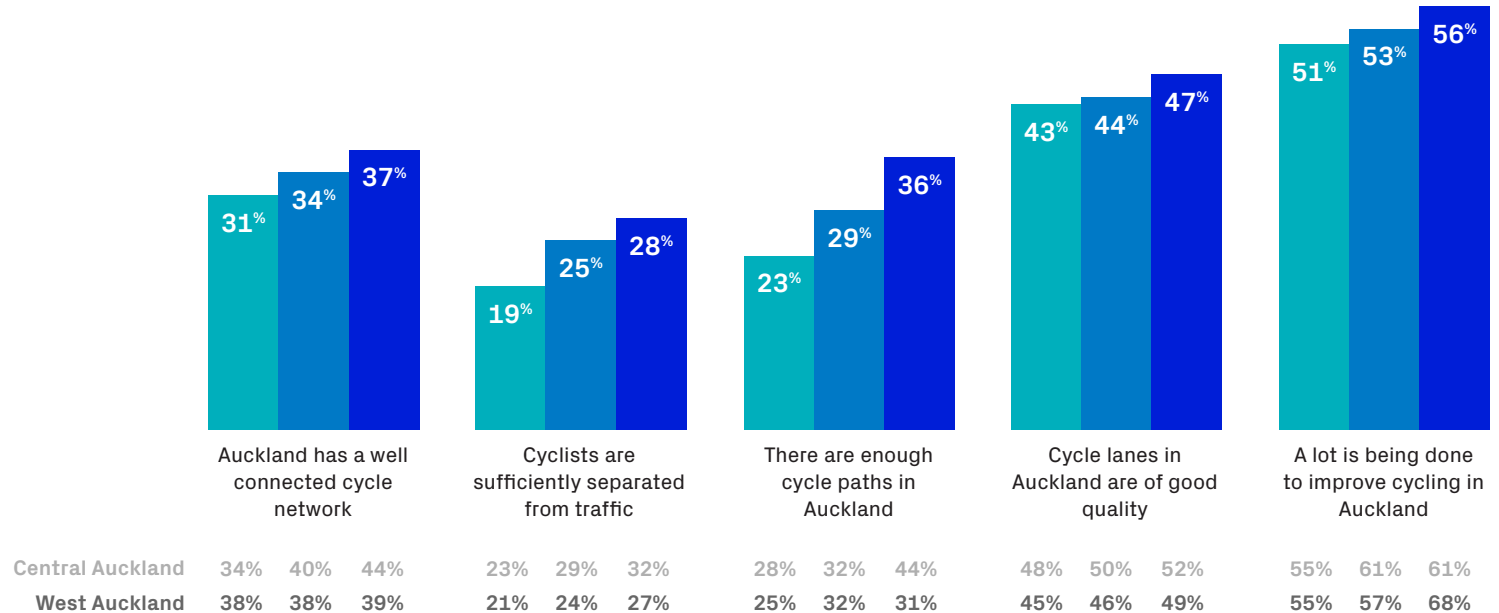
A5a – In general, how confident are you/would you be, in riding a bicycle in the Auckland area?
 Base: Able bodied 2018 n=1,309, 2017 n=1,322; 2016 n=1,076



And infrastructure build has had an impact on infrastructure perceptions

Increases have been seen in Auckland, in particular in west and central Auckland where infrastructure has been laid.

- 2016
- 2017
- 2018

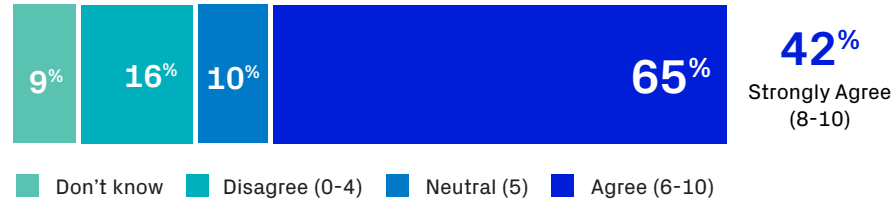


A26 - How strongly do you agree, or disagree, with each of the following statements? (2018 n=1,309)

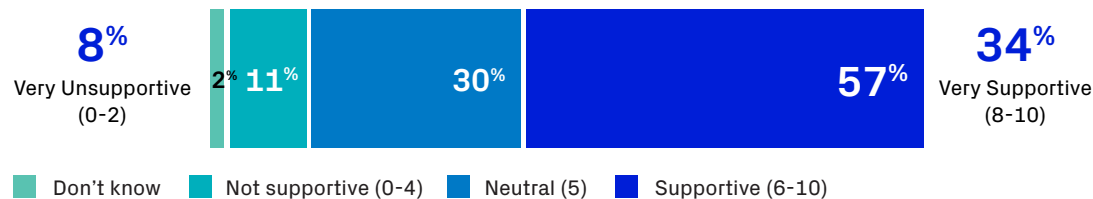


Most people believe cycle lanes are good and support them in their community

CYCLE LANES & CYCLING PATHS ARE GOOD FOR MY COMMUNITY AMONGST ALL AUCKLANDERS*



SUPPORT FOR CYCLING IN YOUR COMMUNITY AMONGST ALL AUCKLANDERS**



Assumption when re-proportioning scores to be amongst all Aucklanders: used 'rejectors' actual scores; 'considerers' allocated a score of 5; 'occasional cyclers' allocated a score 6-7; 'medium' and 'frequent' cyclists allocated a score of 8-10.

**A26_6 How strongly do you agree or disagree with each of the following statements? **A10b There are varying levels of support in the community for people who chose 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: Able-bodied n=1,309 – Why do you say that Base: Cycling Rejectors who do not support cycling n=148

At the heart of the negativity is a genuine concern for cyclist's safety.

Those who aren't supportive of cycle ways:

- Concerned with cyclist safety/driver behaviour 30%
- Find cyclists a nuisance/pain/hazard to other road users 28%
- Are concerned about roads/infrastructure 18%
- Simply apathetic towards cycling 13%



Infrastructure is helping to reduce barriers and drive motivations for cycling

AMPLIFIED

LOOKING AT REASONS WHY PEOPLE CYCLE		2017	2018	DIFFERENCE FROM 2016
INFRASTRUCTURE	Better routes are available than previously	9%	13%	▲ 5% PTS
	Availability of cycle parking at public transport interchanges / stations	4%	9%	▲ 4% PTS
	More consistent travel time	10%	15%	▲ 6% PTS
CAR	Helps reduce traffic congestion	18%	23%	▲ 8% PTS
	Avoids parking hassles	19%	26%	▲ 6% PTS

DIMINISHED

LOOKING AT THE BARRIERS TO CYCLING/CYCLING MORE		2017	2018	DIFFERENCE FROM 2016
INFRASTRUCTURE	I don't feel safe because of how people drive	58%	52%	▼ 12% PTS
	I don't feel safe cycling in the dark	44%	41%	▼ 12% PTS
	There's not enough cycle lanes or separated routes	32%	28%	▼ 11% PTS
	There's no secure place to leave a bike when out and about	29%	26%	▼ 8% PTS
DISTANCE	Cycling is not a quick way for me to get where I need to go	32%	31%	▼ 8% PTS
	I live too far away for it to be practical	26%	24%	▼ 7% PTS

A20 Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling in Auckland, which of these statements, if any, apply to you? (n=1309). A17 From the list below, what are the key reasons you choose to cycle? Cyclists (n=557)

What's happening with walking

4

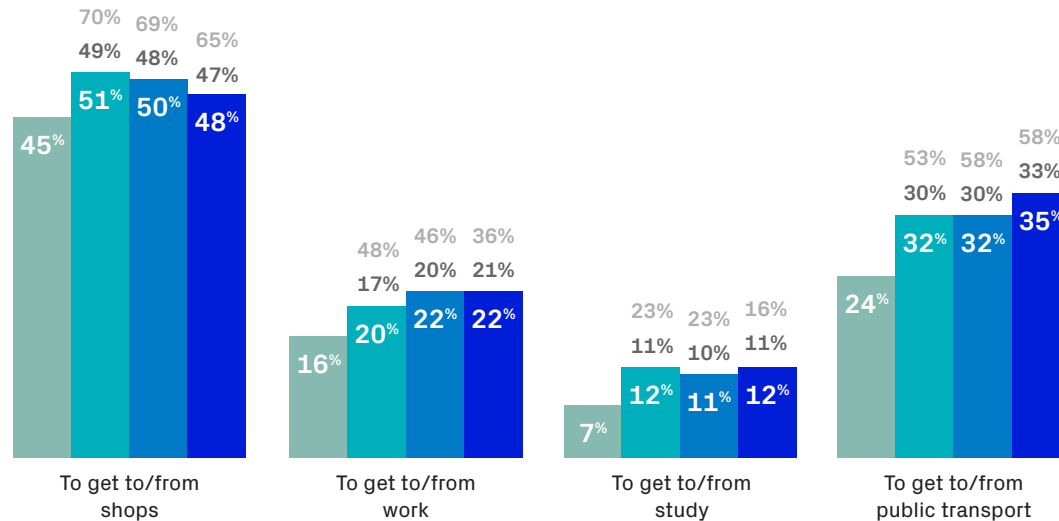
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Overall, the number of key point-to-point journeys taken by walking remains stable

Aucklanders from inner city suburbs are more likely to walk for these key journeys than those from other suburbs.

% OF WALKERS DOING THESE OCCASIONS



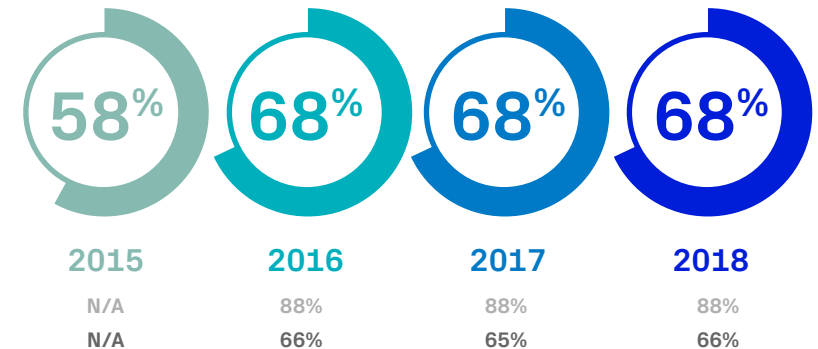
2018 Inner city

2018 Not inner city

B3. What types of trips do you walk for? Able-bodied walkers (n=1296)
 Inner city /city fringe suburbs include Arch Hill, Inner city n=121; not inner city n=1,152
 Central City – CBD, Viaduct, Wynyard Quarter, K Road, Eden Terrace, Freemans Bay, Grafton, Grey Lynn, Herne Bay, Kingsland, Mt Eden, Newmarket, Newton, Parnell, Ponsonby, Pt Chevalier, St Marys Bay, Waterview, Westmere

Since 2015 we made gains in getting more Aucklanders to walk for key point-to-point journeys combined.

However we appear to have reached critical mass with walking as since 2016 this has remained flat.

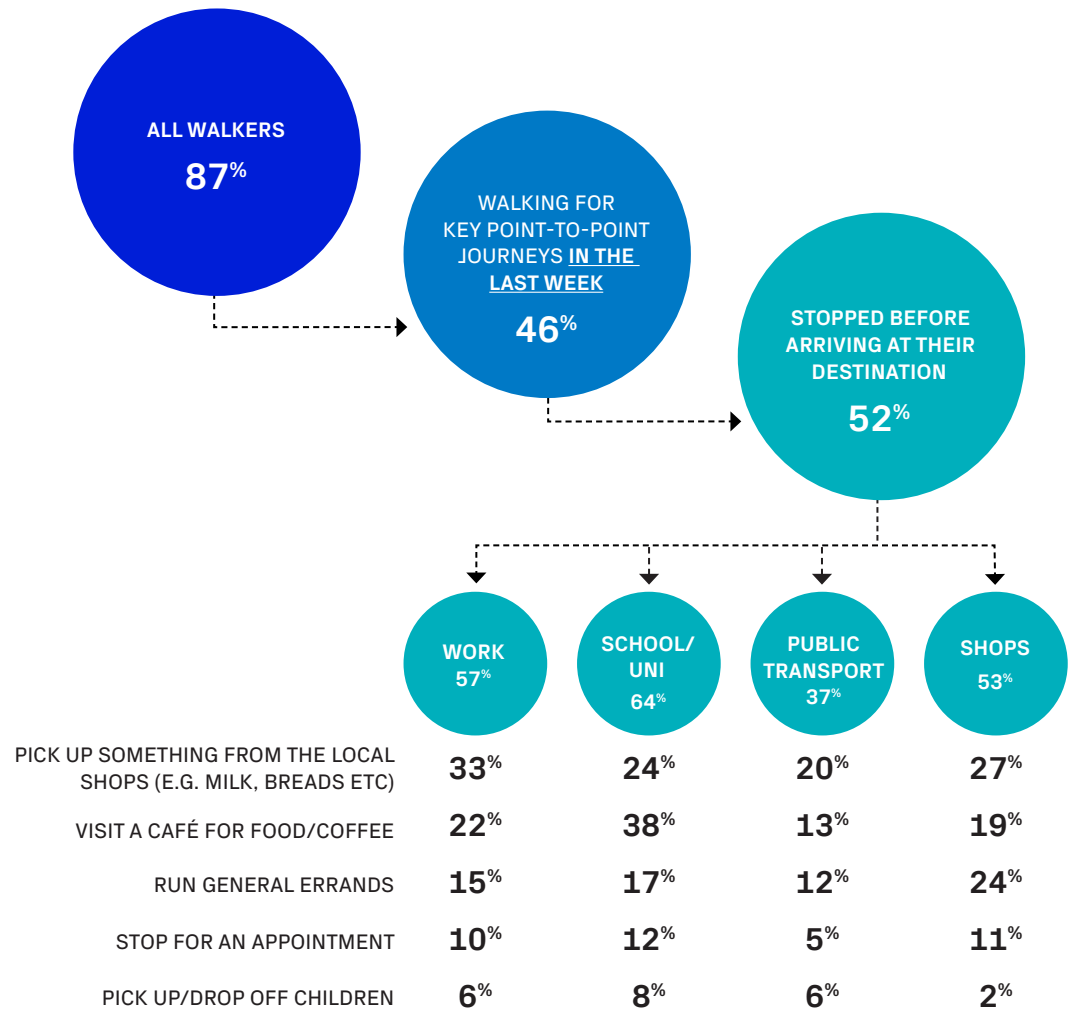




Aucklanders who walk to key point-to-point journeys in the last week are stopping before they reach their destination

Half of Aucklanders doing point-to-point journeys in the last week were stopping before arriving at their destination.

They are less likely to stop if they're walking to/from public transport.



Q16X1 – You mentioned you walked [INSERT TRIPS] in the past week. Thinking about these journeys, did you stop to do any of the following before you arrived at your destination?
 Base: Those who walked to shops n=232, work n=160, school/uni n=106, public transport n=180 in the last week



Most point-to-point journeys take less than 20min

AVERAGE DURATION FOR TRIPS TAKEN IN THE LAST WEEK

TO GET TO/FROM	<10min	10-14 min	15-19 min	TOTAL TRIPS LESS THAN 19min	TOTAL TRIPS OVER 20 min
SHOPS	19%	22%	19%	59%	41%
WORK	22%	23%	16%	61%	39%
SCHOOL	20%	19%	19%	58%	42%
PUBLIC TRANSPORT	39%	24%	16%	79%	21%



Average time Aucklanders are taking to walk to public transport:

- General bus stop ~15min
- Train ~19min
- Busway (Northern Express) ~20min
- Ferry ~21min

Q12 – Thinking about your travel in the last week. On average, how long did you walk for each type of the following trips? Your best estimate is fine. Base: Walked 1 or more times in last week n = 77-402

Most Aucklanders will walk up to 20min to get to their public transport of choice. They aren't necessarily going to walk for longer even if it means they will get to an 'express' train/busway.

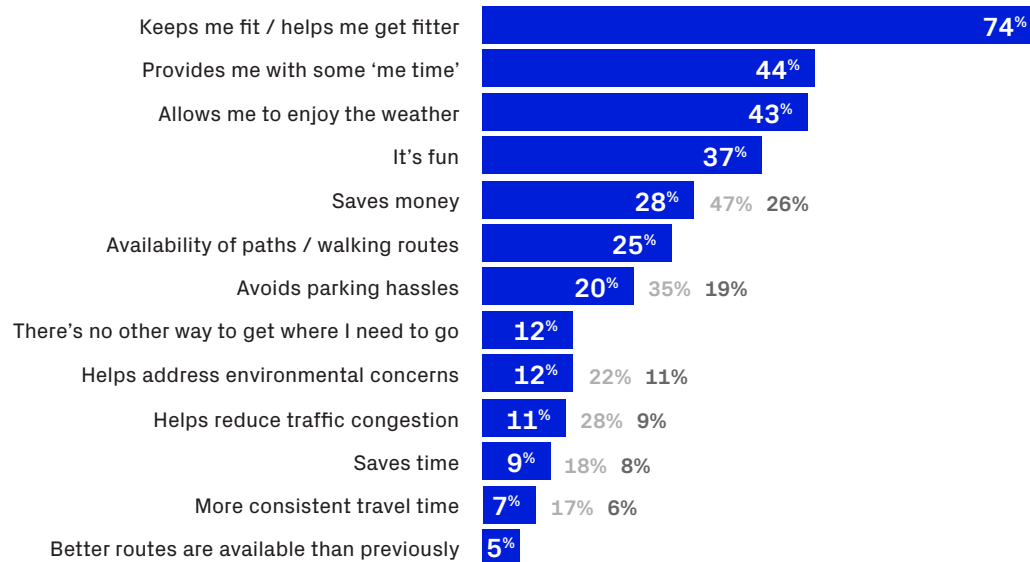
Journeys where people say it's reasonable to walk but they don't currently:

- Walking to school/college/university 20%
- To get to/from the shops 25%
- To get to/from public transport 15%
- To go to/from work 10%



Motivators for walking remain consistent over time

MOTIVATORS FOR WALKING



- Females more likely to walk for fitness, 'me time' and to enjoy the weather.
- People new to Auckland walk because it saves money, time, consistent travel time and helps traffic congestion.
- Older Aucklanders walk for fitness.

2018 Inner city
2018 Not inner city

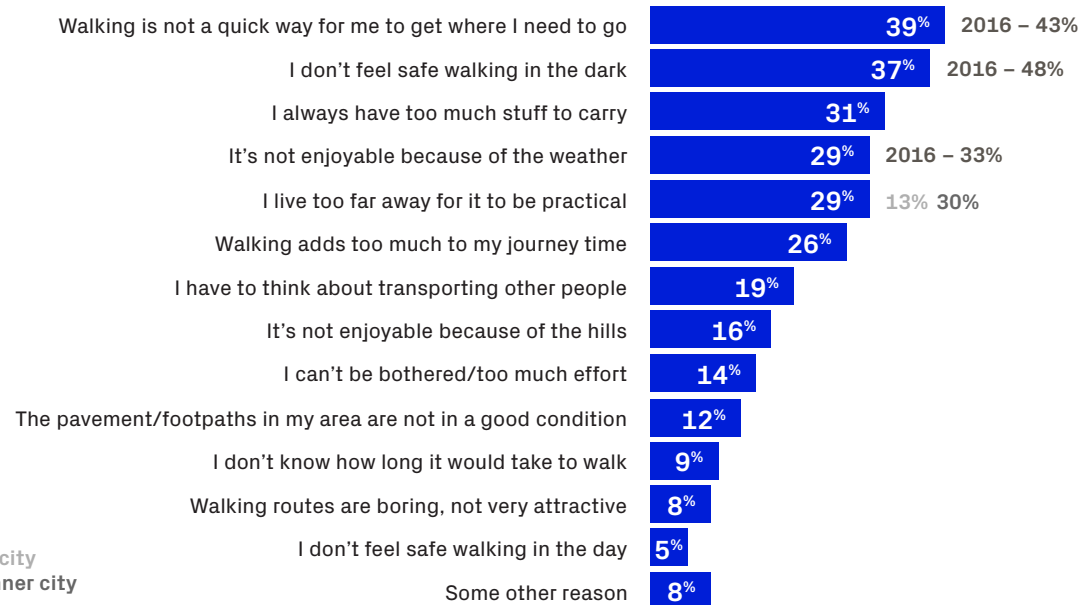
Q10 - From the list below, what are the key reasons you choose to walk?
Base: Walkers n=1,273. City fringe n=121; non-city fringe n=1,152



Barriers for walking remain largely unchanged over time

Perception of safety during the night is less of a barrier for people walking than it has been during the past.

BARRIERS FOR WALKING



- Females less likely to feel safe walking in the dark
- Older Aucklanders are concerned about the condition of footpaths in the area.

2018 Inner city
2018 Not inner city

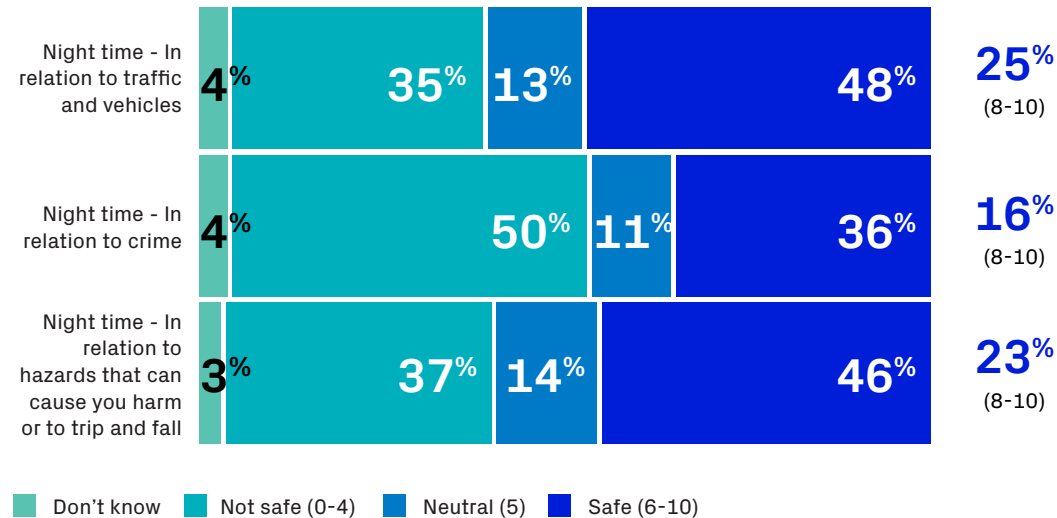
Q11 – Sometimes people tell us there are things that stop them from walking as much as they otherwise would. When it comes to walking in Auckland, which of the statements, if any, apply to you? Base: Walkers n=1,310
*New statement in 2018



Perceptions of safety during the night in relation to traffic and vehicles has improved

Aucklanders are starting to feel safer in relation to traffic and vehicles at night vs 2016.

PERCEPTIONS OF SAFETY WALKING AT NIGHT



Reasons why Aucklanders don't feel safe are:

- **EMOTION:** Don't like walking at night/ don't feel safe at night
- **INFRASTRUCTURE:** Not enough lighting/ need more footpaths/quality footpaths
- **PEOPLE:** gangs/high crime rates

B15 - In general, how safe do you feel / would you feel walking at night time? Base: Walkers n=1,310

Thanks for reading!