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Walking & Cycling Participation Survey

National Report, 2025

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Executive Summary

Executive Summary

The 2025 National Walking and Cycling Participation Survey provides a detailed and nationally representative view of active travel behaviour in Australia. Drawing on responses from over 12,000 individuals via a dual-frame methodology (Computer-Assisted Telephone Interviewing and online surveys), the study offers robust insights into participation rates, trip purposes, travel frequency, duration, comfort levels, and barriers to engagement in walking, cycling, and emerging forms of micromobility such as e-bikes and e-rideables.

Enhancements in Methodology

This wave incorporates several methodological improvements to enhance trend comparability and interpretability. These include updated sampling weights using granular age brackets and dual-mode stratification, revised KPI definitions, and alignment with 2021 ABS population benchmarks. These refinements ensure clearer strategic direction for CWANZ and enable more accurate comparisons across time and demographic groups. Historical data have been reweighted for key metrics (e.g., walking and cycling participation) to reflect these improvements.

Key Findings

- **Walking remains Australia's most common form of active transport.**
  In the past year (2025), 81% of Australians walked for at least 10 minutes on a weekly basis – this equates to around 22.2 million people. While this represents a decline in overall participation since 2023, walking frequency among active walkers has increased slightly, suggesting stronger commitment or routine among this group. Despite the drop in total participation, most Australians continue to walk regularly in their local area, and many perceive they are walking more often, particularly for recreation, pointing to a possible perception gap between behaviour and belief.

- **Cycling participation is steady, with a growing shift toward transport.**
  Weekly cycling participation sits at 15%, with frequency stable at approximately three days per week – this equates to 4.11 million Australians riding in a typical week. A notable change is the growing use of cycling for commuting and transport, now cited by 43% of riders, up from 28% in 2023, reflecting a maturing mode of transport and underlining the need for practical, everyday cycling infrastructure.

- **Infrastructure remains the key lever for increased participation.**
  Respondents consistently nominate safer on-road conditions, better off-road paths, improved connections, and secure end-of-trip facilities as top enablers of walking and cycling. These findings highlight the continued need for investment in infrastructure that is safe, accessible, and convenient.

- **Younger Australians and metro residents are leading active travel rates.**
  Engagement is strongest among children, teens, and urban dwellers, particularly in the ACT and Victoria. This suggests opportunities to target investment and messaging in high-density urban environments where support for active transport is already established.

- **Changing rider profiles demand tailored solutions.**
  Traditional bike ownership is consolidating, with fewer multi-bike households, while e-bike ownership continues to rise, now reaching 6% of households. Most riders identify as interested but concerned users, suggesting that future growth will depend on addressing confidence barriers and catering to diverse rider profiles through both infrastructure and messaging.

- **Micromobility adoption is emerging, led by younger males.**
  E-rideables remain a niche mode with 2% weekly usage and 3% household ownership, though uptake is growing among younger demographics, especially in the ACT and NT. While still in the early stages of adoption, this trend signals growing interest in short-distance electric mobility and highlights the need to monitor uptake and infrastructure readiness.

- **Established riders are stabilising in frequency.**
  Cycling frequency has plateaued among regular riders, with fewer participants increasing or decreasing their riding rates compared to the last survey. This stabilisation points to a core rider base that could be leveraged for growth, provided time, safety, and motivation barriers are addressed.

- **Conclusion**
  The 2025 survey reflects a maturing active transport landscape in Australia. While overall participation levels in walking and cycling remain high, growth appears to be moderating, particularly among existing users. However, notable gains in transport-based cycling, rising e-bike adoption, and urban youth engagement present clear opportunities. Addressing infrastructure gaps and fostering confidence among new riders will be critical to sustaining momentum and advancing national active transport outcomes.

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Background & Methodology

Background to this project

As part of its efforts to increase the number of people walking and riding, CWANZ requires national level data on walking and cycling participation in each state and territory over different time frames.

The National Walking and Cycling Participation Survey (NWCPS) provides insight into walking and cycling activity across Australia. The survey provides data on walking and cycling participation at a national and state or territory level and within each state or territory. The survey replaces the National Cycling Participation Survey, a predecessor cycling-specific survey that was undertaken nationally biennially since 2011.

This year, Painted Dog Research has been commissioned to conduct the National Walking and Cycling Participation Survey.

This report details the findings of the survey at the national level.

Strategic aim & objectives

The overall strategic aim of this research was to:

Provide national data on walking and cycling participation and estimates of the number of people who have walked and/or ridden a bicycle in each state and territory in capital city and regional areas over different time frames.

To deliver on the strategic aim, the following objectives were addressed:

1. Quantify the number of people that have ridden a bike, used an e-rideable, and have walked in urban areas in the past 12 months.
2. Explore the reasons and purposes people choose to walk, ride a bike, or use an e-rideable.
3. Determine the extent to which results have changed over time, comparing data with previous waves of the survey.
4. Identify differences in participation and reasons both within and across states and territories, looking into specific demographics and subgroups.

How the research was conducted

1 Approach

- An online survey was conducted among the general population from across Australia.
- Surveys were also done through Computer Assisted Telephone Interviewing (CATI) among the Australian general population.
- Participants were required to be aged 15 and above.
- Respondents were sourced via research panels.
- Fieldwork was conducted from 11th March 2025 to 9th April 2025.
  - **Weather across Australia** - in the 7 days preceding and during the 2025 survey field period, daily temperatures ranged from lows of around 2° to 6°celcius to daytime highs of 17° to 24°Celsius.
  - **Potential Weather Impacts** - Cyclonic and Flood Influence in Queensland and NSW. Australia experienced Severe Tropical Cyclone Alfred from 21 February to 9 March 2025, which brought torrential rainfall, wind damage, and flooding to South East Queensland and northern New South Wales. Queensland also suffered widespread flooding between late January and April, associated with multiple low-pressure systems, with some areas recording over 1,000 mm of rain during early February.

2 Data Collection

- A total of n=4,796 complete responses were collected with an average survey length of 11.9 minutes.
- n=2,447 were collected from the online survey, and n=2,349 were collected from the CATI survey.
- The margin of error is very low at +/- 1.4% at the 95% confidence interval.
- Sampling in QLD and NSW was delayed by 9 days (20th Mar) due to the regions being affected by a cyclone.

3 Values

- Values shown in the charts are percentages (%), unless otherwise indicated.
- Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.

4 Significance

- Significance is tested at the 95% confidence interval.
- Differences between sub-groups are indicated by stars:
  - ★ = Significantly higher
  - ☆ = Significantly lower
- Differences between waves are indicated by arrows:
  - ▲ • Significantly higher
  - ▼ • Significantly lower
- People icons have been used to indicate number of respondents in place of percentages:
- Where no significant differences exist between sub-groups, results may not be charted.

Sampling – Online Component

A component of the survey was administered as an online survey of residents across all states and territories in Australia. The sample was sourced through a commercial Australian panel provider with participant information verified to include locality data.

Respondents were randomly invited to participate and were screened to ensure eligibility criteria were met. In accordance with market research guidelines, the main respondent was required to be aged 15 years or older and have been a resident in the household for at least the past 90 days.

Quotas were applied to ensure the sample broadly reflected household size distributions based on the most recent Australian Bureau of Statistics (ABS) Census data. Sampling was stratified by state and territory, with further division between capital city metropolitan areas, defined by the ABS as the Greater Capital City Statistical Areas (GCCSAs) and non-GCCSA areas in each jurisdiction.

The Australian Capital Territory was treated as a single entity and not split into capital city and other areas, in line with ABS classifications.

Sampling – CATI Component

The CATI component of the survey was administered using a commercial database of landline and mobile telephone numbers, with a 60:40 ratio of mobile to landline records. Telephone numbers were randomly selected and dialled in a rotating order, with markets removed as quotas were filled.

Up to three call attempts were made for contacts in metropolitan areas and up to six for regional areas, with a minimum interval of three days between contact attempts, extending up to seven days where feasible. This allowed for adequate call spacing across a wide geographical spread.

Where contact could not be made, respondents were able to return calls via voicemail, which interviewers monitored throughout the day.

No additional screening questions were used beyond those provided by Painted Dog Research; geographic location was confirmed via postcode. In accordance with market research standards, the main respondent was required to be aged 15 or older and have been resident in the household for at least the past 90 days.

Interviewing was conducted across all Australian states and territories, with an even distribution of interviews targeted across the project period. In each state the sample was divided between residents located in the capital city metropolitan area as defined by the Australian Bureau of Statistics (ABS) as the Greater Capital City Statistical Area (GCCSA) and the remainder.

Social Desirability Bias

Mixed-mode surveys inherently face mode effects, where the presence or absence of an interviewer can systematically influence respondents' answers. A well-documented issue is social desirability bias, the tendency to over-report behaviours perceived as positive and under-report those seen as negative or unconventional. Research consistently shows that interviewer-administered modes, particularly telephone-based methods like CATI, are significantly more prone to this bias than self-administered web surveys[1].

For example, respondents in telephone interviews often provide more socially acceptable responses due to perceived social pressure or a desire to please the interviewer, while those completing online surveys tend to answer more candidly, with fewer impression-management distortions. In our hybrid design, these mode discrepancies may lead to inflated reports of walking or cycling in the CATI component, particularly for socially normative active travel behaviours, compared with more conservative estimates from the online component.

The literature concludes that web surveys offer greater privacy and are more likely to elicit honest responses. While our weighting procedure stratifies by data collection mode and demographic composition to ensure comparability, it does not directly adjust for social desirability bias. As such, observed differences between methodologies, especially in self-reported walking and cycling, may reflect not only true behavioural variation but also methodology-driven response effects.

1. Kreuter, F, Presser, S and Tourangeau, R (2008): Social Desirability Bias in CATI, IVR, and Web Surveys - The Effects of Mode and Question Sensitivity. The Public Opinion Quarterly, 72, 5.

Fieldwork

Recognising that walking and cycling activity can be influenced by seasonal variation and weather conditions, the survey fieldwork was conducted over a four-week period from 11 March to 9 April 2025. This timing was consistent with previous waves of the survey to support comparability of results across years.

While fieldwork was conducted concurrently across most states and territories, data collection in New South Wales and Queensland commenced slightly later from 20 March due to disruptions caused by Cyclone Alfred.

In line with previous waves, the main respondent, aged 15 years or older, was asked to respond on behalf of all household members. This approach enables broader population coverage, including of children, in a cost-effective manner. However, it does rely on the respondent having a reasonable understanding of other household members' travel behaviours, which may introduce some limitations in the precision of individual-level reporting.

Survey Design

Respondents to the survey were asked about their recent participation in walking, cycling, and the use of electric bicycles, as well as newer forms of mobility including e-rideables such as e-scooters and e-skateboards. The survey captured the purpose, frequency, and duration of these activities, along with perceptions and attitudes toward walking and riding for both transport and recreational purposes.

Respondents were asked to recall the last time they had walked for at least ten minutes outside their home (excluding activities such as gardening or treadmill use) and the last time they had ridden a bicycle or e-bike. Those who had engaged in these activities in the previous week were asked to report the number of days and the estimated total time spent walking or riding.

In order to ensure accessibility and clarity across modes of data collection, slightly different versions of the survey were administered to Computer-Assisted Telephone Interviewing (CATI) and online respondents. The CATI version was specifically optimised for verbal delivery, while the online version included additional detail where appropriate.

Weighting – Summary Explanation

What's changed in the 2025 Weighting Approach?

Two Methods with One Balanced Output

- This year's survey was conducted using both phone interviews (CATI) and online surveys. The age distribution, especially for people aged over 50, looked different between the two methods. To ensure the results from CATI and online were comparable, the weighting was adjusted to treat people aged 50 to 69 and 70+ equally across both methods.

More Detailed Age Groups

- Compared to previous studies, the 2025 survey used finer age categories (e.g. 25 to 29, 30 to 39, etc.) rather than broader age bands. This provided a more accurate representation of the population, particularly for age-sensitive results like walking and cycling frequency.

Applied Selectively to Key Results

- This new weighting approach has only been applied to key participation results (e.g. walking and cycling participation) from 2021 to 2025, to allow meaningful comparison over time. For other indicators, previous weighting approaches were retained for consistency.

Five Weighting Types Were Used

- Depending on the question type (household vs individual, main responder only vs all household members), different weights were applied, always taking into account CATI vs online differences.

Historical Results Slightly Adjusted

- In some cases, historic results had to be recalculated using this new approach to maintain comparability. This may mean minor differences in results from what was published in 2023, especially where past methods couldn't be fully replicated.

Variables

- Data was weighted using ABS 2021 Census benchmarks for age, gender, household size, location (metro/regional), and collection mode (CATI/online). This ensures the data are demographically representative and comparable across survey waves. While the weighting approach adjusts for demographic and mode composition, it does not correct for potential response bias arising from survey mode. In particular, CATI respondents may be more susceptible to social desirability bias, potentially over-reporting behaviours perceived as socially desirable, such as walking or cycling compared to online respondents.

Weighting – Technical Explanation

To ensure comparability across data collection methods and align with Painted Dog Research's design protocols, a comprehensive calibration and weighting review was undertaken for the 2025 NWCPS wave. The weighting adjustments aimed to reconcile key differences between CATI and online samples while preserving trend integrity with past years.

1. Calibration to CATI and Online Sample Differences

- A key discrepancy was identified in the distribution of respondents aged 50+ between CATI and online methodologies.
- The 2025 weights were adjusted to equally represent respondents aged 50–69 and 70+ across both modes, ensuring alignment on age, gender, and location benchmarks.

2. Introduction of Granular Age Brackets

- The 2025 wave introduced more detailed age bands (e.g. 0–2, 2–4, 5–9 … up to 80+), improving demographic accuracy and reducing bias in age-sensitive participation metrics.

3. Selective Application of New Weighting

- The updated weighting approach was applied only to key performance indicators (KPIs), specifically walking and cycling participation across the 2021 to 2025 waves.
- All other non-KPI questions use the 2025-specific weights only, and historical questions retain previous methods to ensure longitudinal comparability where applicable.

4. Weighting Factors Used

Five distinct weight factors were applied throughout the report:

Weighting Type	Applied To	Years Used	Stratification
Person-level (KPI)	Main + household	2021–2025	By CATI/Online with granular age
Main responder (KPI)	Main responder only	2021–2025	By CATI/Online with granular age
Person-level (non-KPI)	Main + household	2025 only	By CATI/Online with granular age
Main responder (non-KPI)	Main responder only	2025 only	By CATI/Online with granular age
Household-level	Household questions	All years	By CATI/Online; ABS 2021 household sizes

5. Population Controls

- Person-level and main responder data were calibrated to ABS 2021 population estimates by age, gender, and capital city vs regional areas.
- Household-level data used ABS household size distributions (1 to 6+ residents) with CATI/online mode stratification.

6. Notes on Historical Adjustments

- Where needed, historic data were re-processed using the updated weighting for KPI comparability. Small discrepancies may appear compared to previously published figures due to improved accuracy or inability to replicate earlier processing logic.

Testing of Statistical Significance

Throughout this report, statistical significance has been assessed using a two-tailed test at the 95% confidence level. This means that any differences highlighted are unlikely to have occurred by chance alone and reflect a genuine difference in the population with 95% confidence.

The two-tailed method considers the possibility of differences in either direction, whether an increase or a decrease, ensuring a balanced and rigorous assessment of change across waves or subgroups.

Where statistical significances cannot be applied due to small sample size (<30), figures are denoted with a * and should be treated with caution.

Other notes

New Question on Attitudes to Bicycle Riding (2025)
In 2025, a new question was introduced: *"What phrase best describes your attitude towards bicycle cycling?"* This aimed to segment the population using the well-established four cyclist typologies first proposed by Geller (2006) and later validated by Dill & McNeil (2013, 2016). These are:

- **Strong and Fearless**: I'll ride no matter what
- **Enthused and Confident**: I'm happy to ride in most circumstances
- **Interested but Concerned**: I would ride more if I felt more comfortable / I would take up riding if I felt more comfortable
- **No Way No How**: I would not ride and I'm not interested or able to ride

The 2025 survey adopted a user self-selection approach to categorisation, based on refinements trialled by the Western Australian Department of Transport (WA DoT) between 2020 - 2023. This method simplifies respondent understanding, improves consistency over time, and enables more accurate reporting of attitudinal market segments. An additional sub-question was included for the "Interested but Concerned" category, allowing analysis of those who might take up riding (new) versus those who already ride but would ride more if conditions improved (existing).

A more detailed explanation can be found in Appendix 3 of the report.

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Sample Profile

Sample size by Jurisdiction

Data was collected from a total of 4,796 households / main respondents and 12,386 persons across Australia.

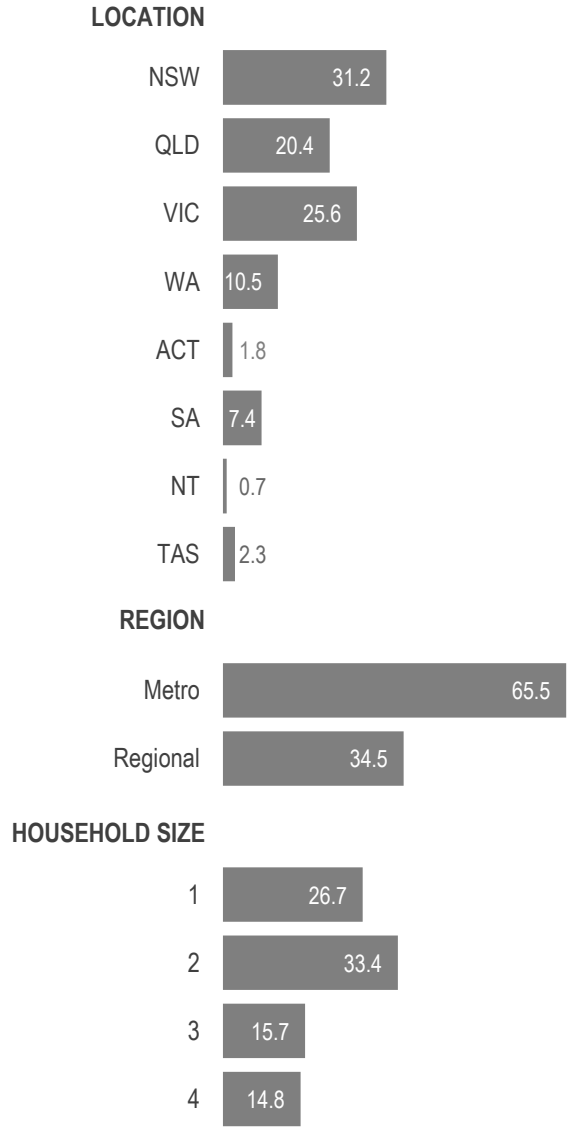
The figures in this slide reflect a weighted sample, which is used to ensure the data is representative of the state's population in proportion to the overall national sample. While the actual data collection may involve a larger number of respondents, the weighted figures are adjusted to align with the broader population, ensuring the sample accurately reflects state demographics within the national context. This approach helps maintain the integrity of the findings, even when the weighted numbers appear smaller.

Please refer to the notes on page 12-13 of this report for more details on the weighting approach undertaken for the research.

State	Households	Persons
New South Wales	1498	3881
Queensland	979	2514
Victoria	1228	3091
Western Australia	504	1349
Australian Capital Territory	86	247
South Australia	354	865
Northern Territory	34	152
Tasmania	112	287
Total	***4796***	***12386***

Sample profile - Household Level

Demographic results on this slide is reflective of the respondent's household, with questions answered by the main respondent.

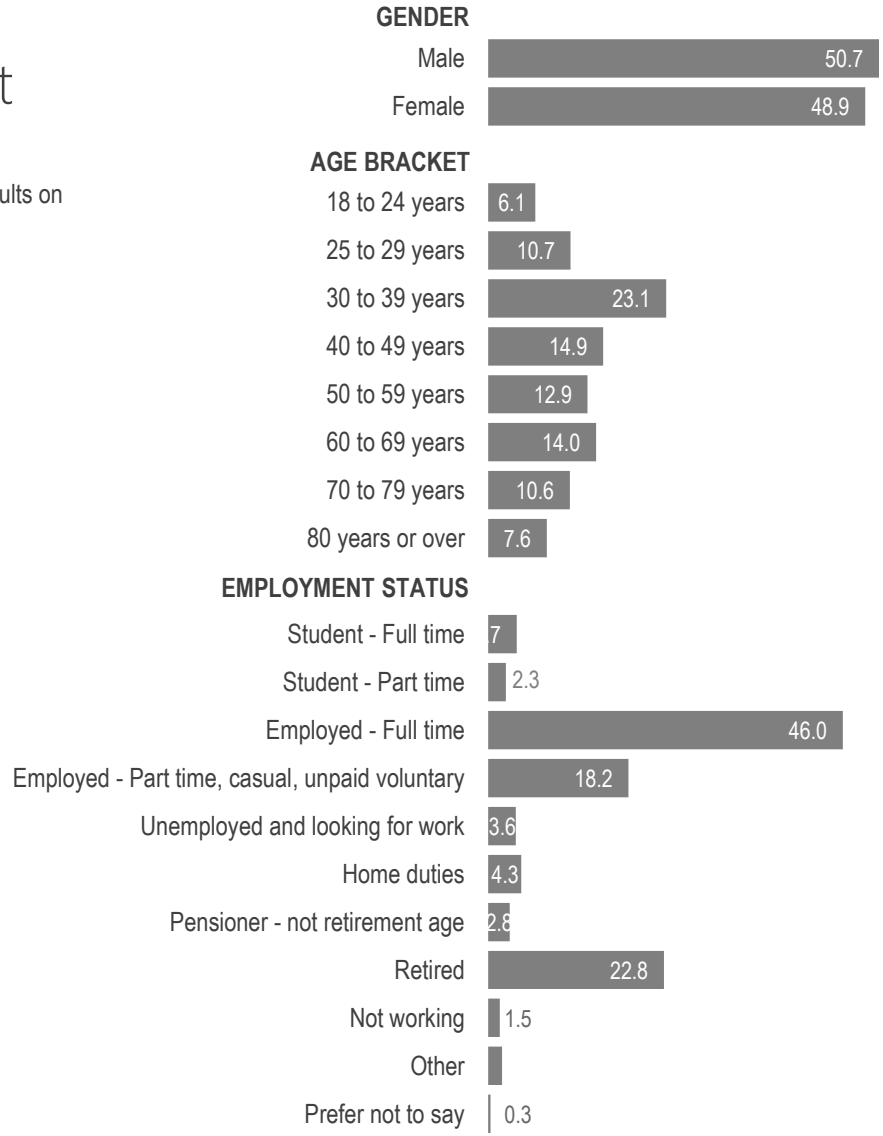


Base: Main Respondent (n=4796)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Sample profile - Main Respondent

This sample profile is made up of main respondents of the survey. Demographic results on this slide is reflective of the main respondent on behalf of his/her entire household.



Base: Main Respondent (n=4796)

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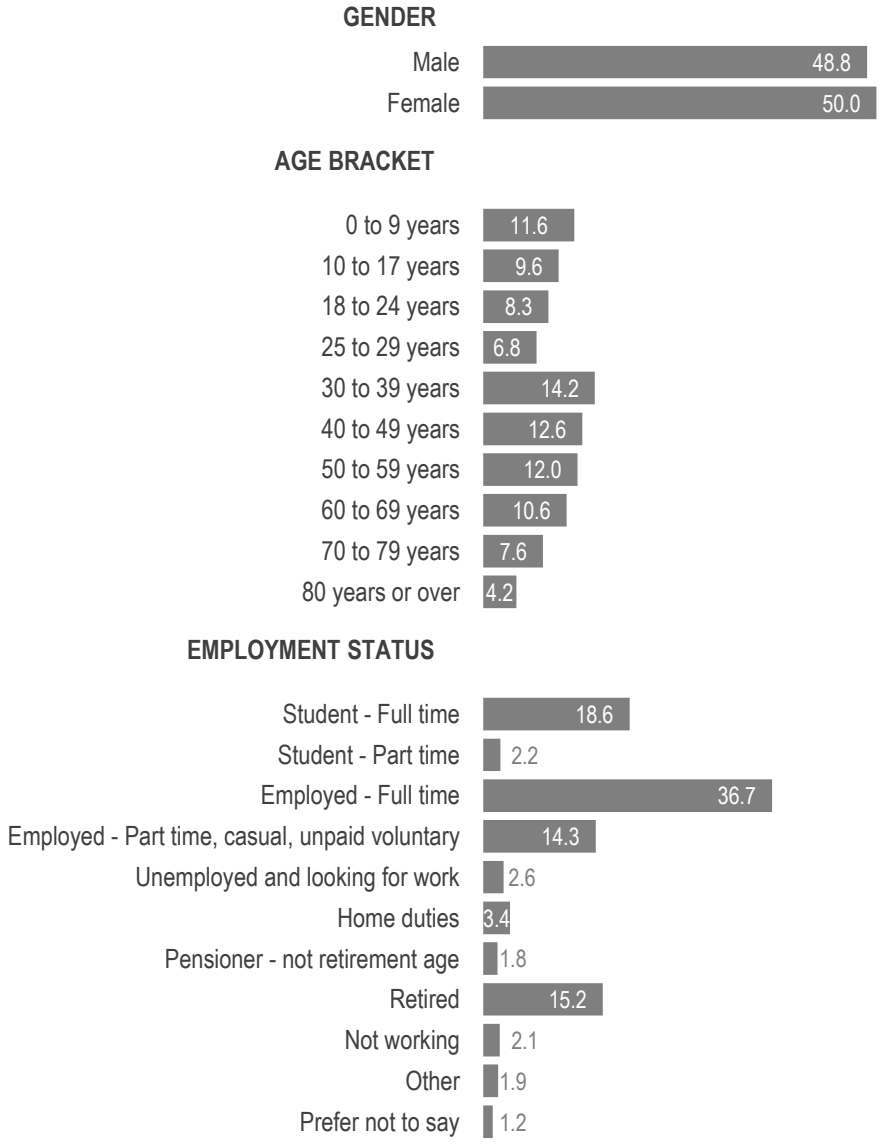
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Sample profile - All respondents

Demographic results on this slide is reflective of all respondents captured in the survey, including both the main responder and other household members in which the main respondent had responded on their behalf.



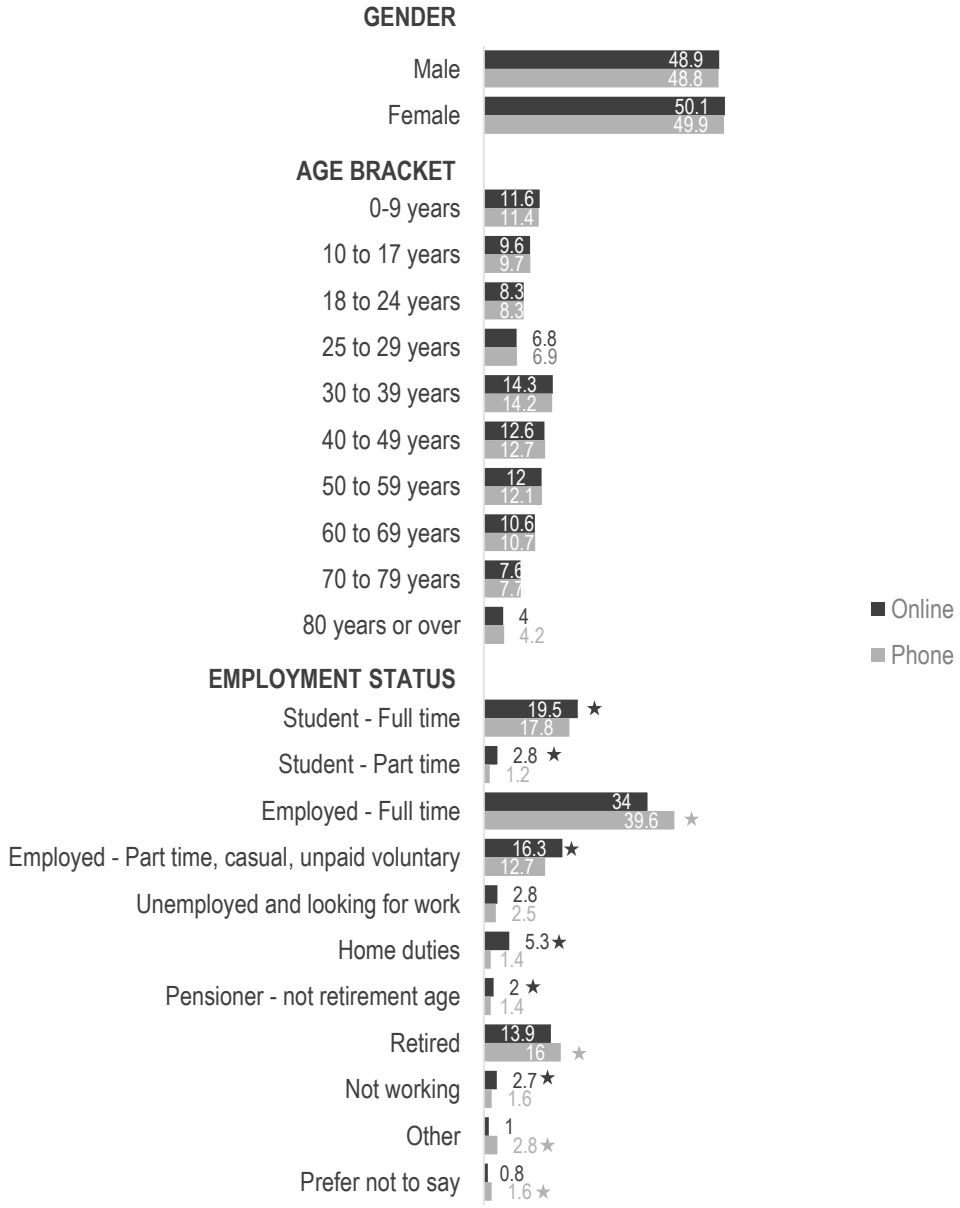
Base: All Respondents (n=12,386)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Sample profile - All respondents

by Online & CATI

Demographic results on this slide is reflective of all respondents captured in the survey, including both the main responder and other household members in which the main respondent had responded on their behalf, split by Online and CATI respondents.

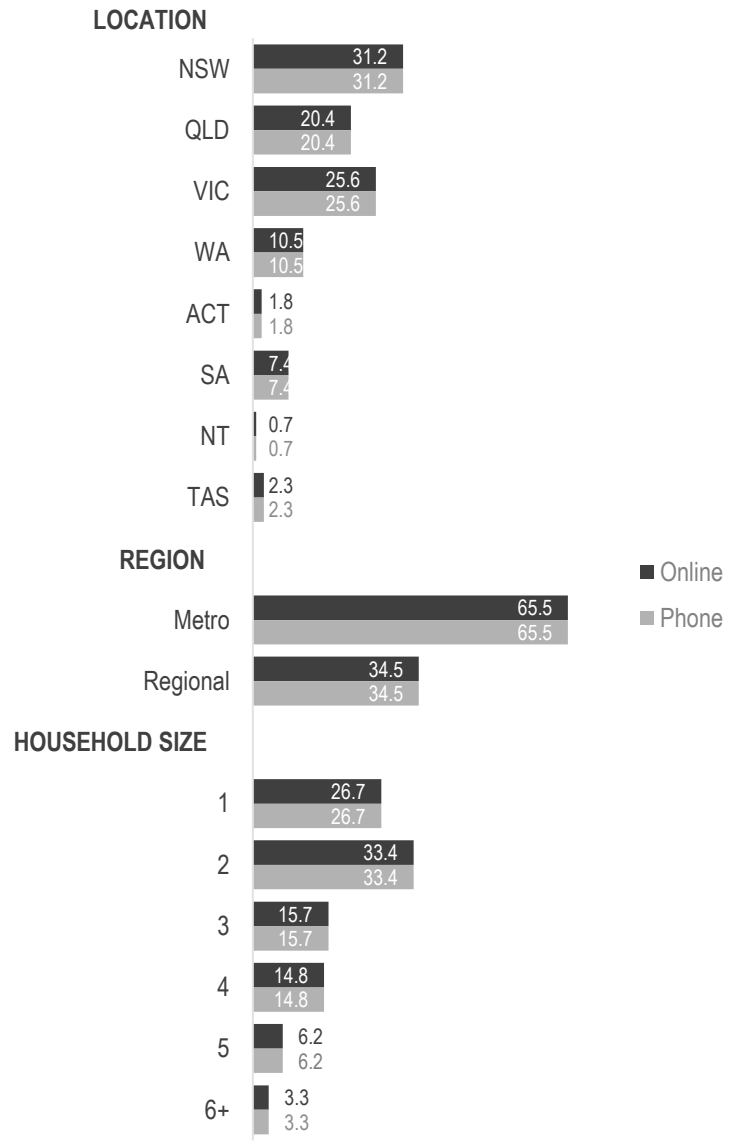


Base: All Respondents, Online (n=6,627), CATI (n=5759)

Sample profile – Household Level

by Online & CATI

Demographic results on this slide is reflective of the respondent's household, with questions answered by the main respondent, split by Online and CATI respondents.



Base: Main Respondents, Online (n=2,447), CATI (n=2,349)

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Walking – Participation, Trip Purpose and Frequency

Definition of walking

Walking was defined as:

- Travel by foot or using a mobility aid such as a wheelchair or mobility scooter that occurred outside the home, and
- A duration of at least 10 minutes*

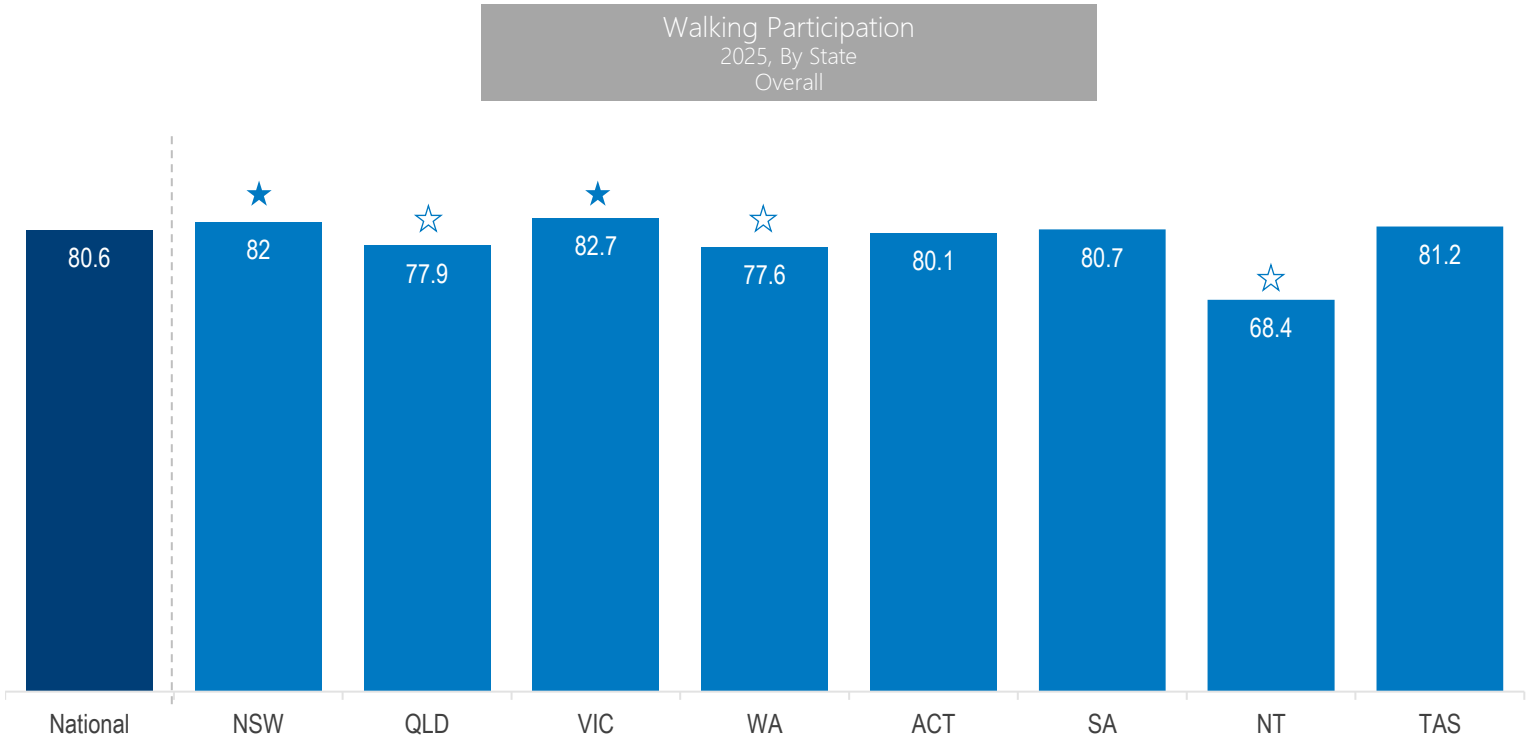
By this definition, walking within the home, or very short distances such as from the home to a parked car, are excluded. Most other forms of walking are included, such as for recreation walking to shops, public transport, to a workplace, or escorting others.

Prior to the 2023 survey when a 10 minute walking duration was first applied, a threshold of 5 minutes was used.

** NOTE: The 2021 survey used a threshold of five rather than ten minutes walking duration.*

The majority across Australia are actively walking.

Those living in VIC and NSW are significantly more likely to be active walkers compared to those in WA, QLD and NT.

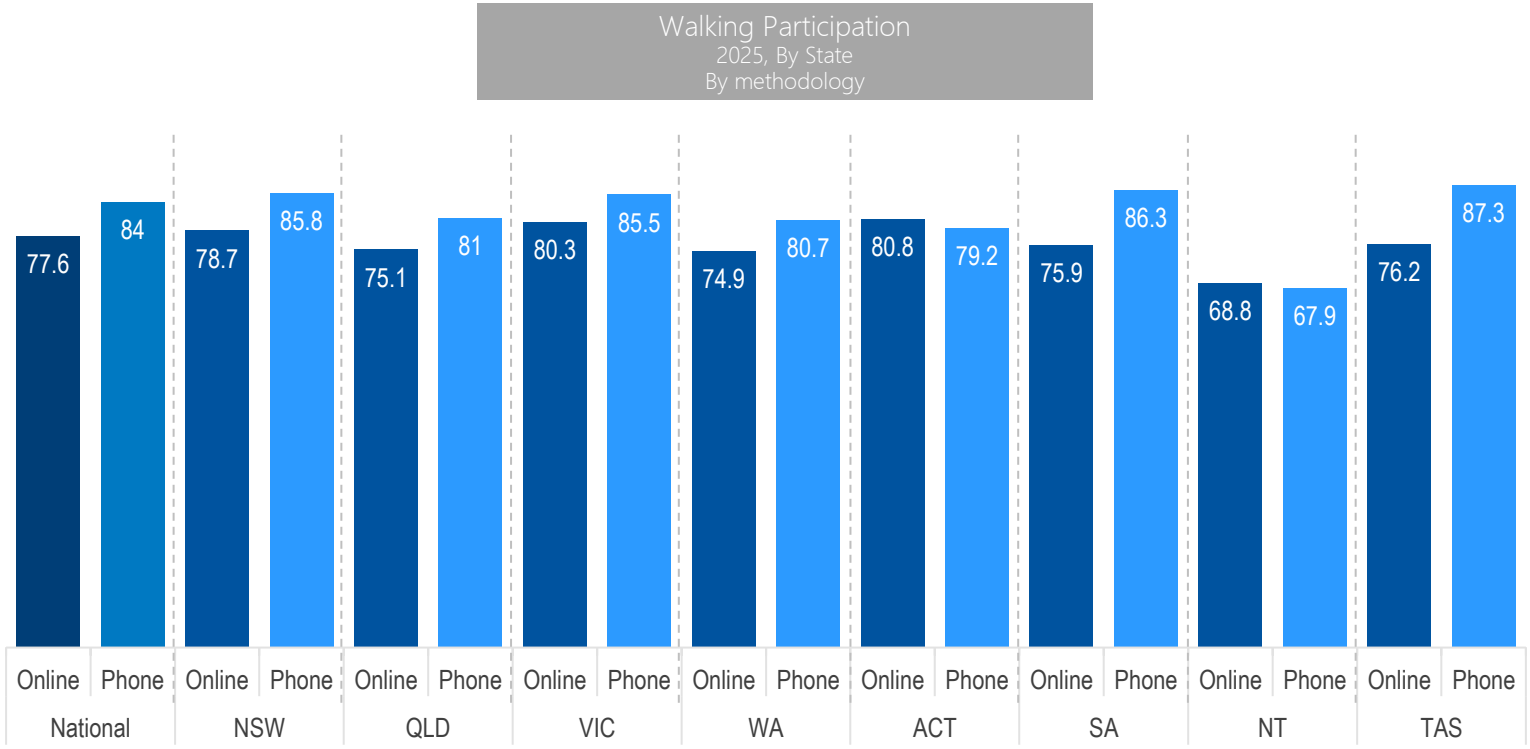


Q6 / Q39. In the last 7 days, have you walked / used your wheelchair or mobility scooter for 10 minutes or more, somewhere outside of your home?
Base: All Respondents (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Walking Participation (State)
by methodology

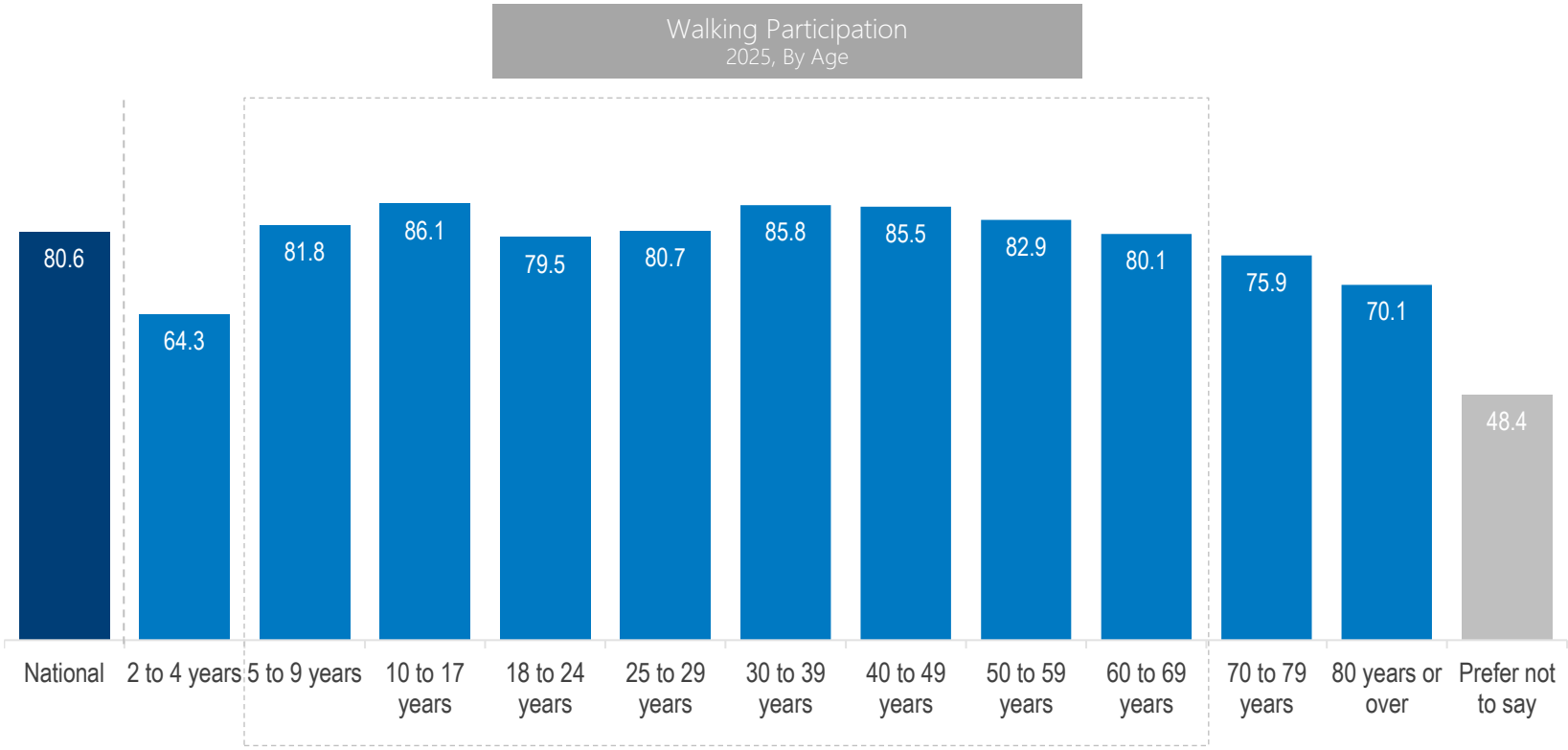
Literature indicates that social desirability bias is more pronounced in interviewer-administered surveys, such as telephone interviews, compared to self-administered online surveys. As such, behaviours perceived as socially desirable, like walking or cycling, may be over-reported in CATI responses relative to online survey responses.



Q6 / Q39. In the last 7 days, have you walked / used your wheelchair or mobility scooter for 10 minutes or more, somewhere outside of your home?
Base: All respondents; online (n=6,482), phone (n=5,704).

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

At least 4 in 5 between the age of 5 to 69 are active walkers.



Q6 / Q39. In the last 7 days, have you walked / used your wheelchair or mobility scooter for 10 minutes or more, somewhere outside of your home?
Base: All Respondents (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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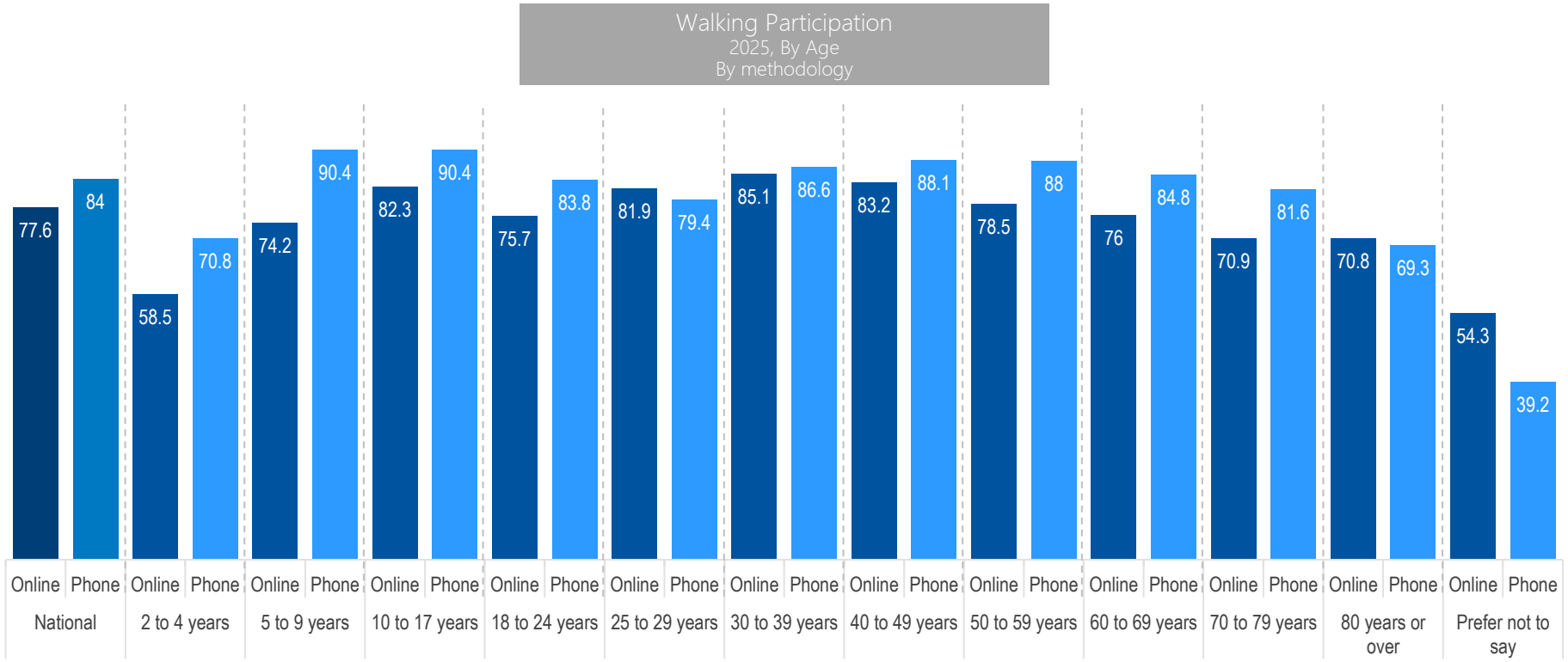
Walking Participation (Age)
by methodology



Q6 / Q39. In the last 7 days, have you walked / used your wheelchair or mobility scooter for 10 minutes or more, somewhere outside of your home?
Base: All respondents; online (n=6,482), phone (n=5,704).

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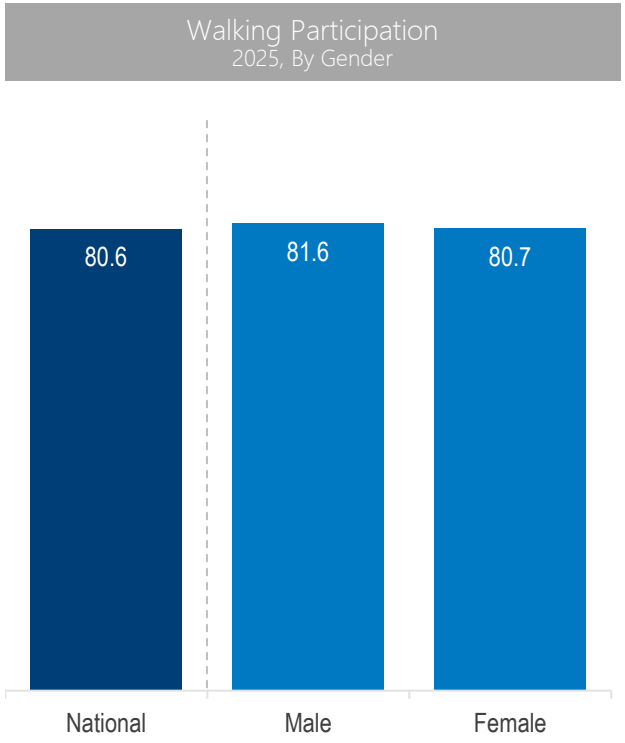
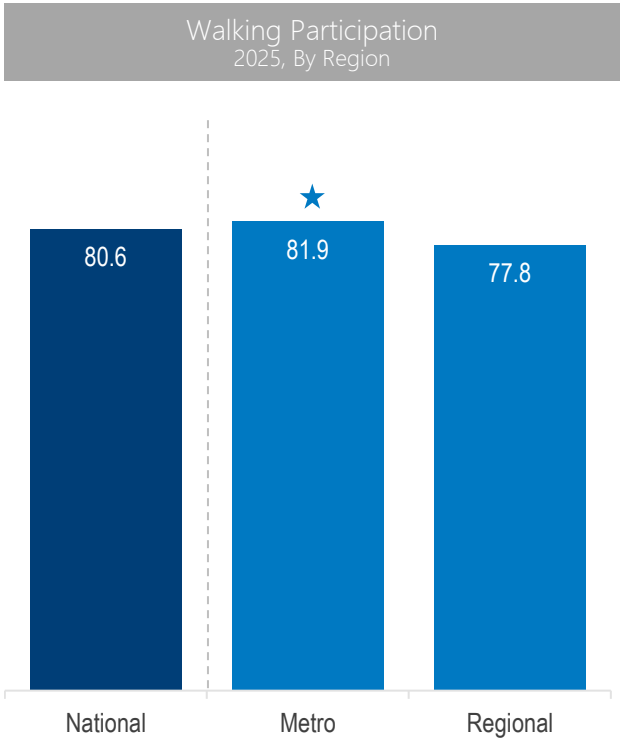
A significantly higher proportion of those living in metro regions are active walkers.





Q6 / Q39. In the last 7 days, have you walked / used your wheelchair or mobility scooter for 10 minutes or more, somewhere outside of your home?
Base: All Respondents (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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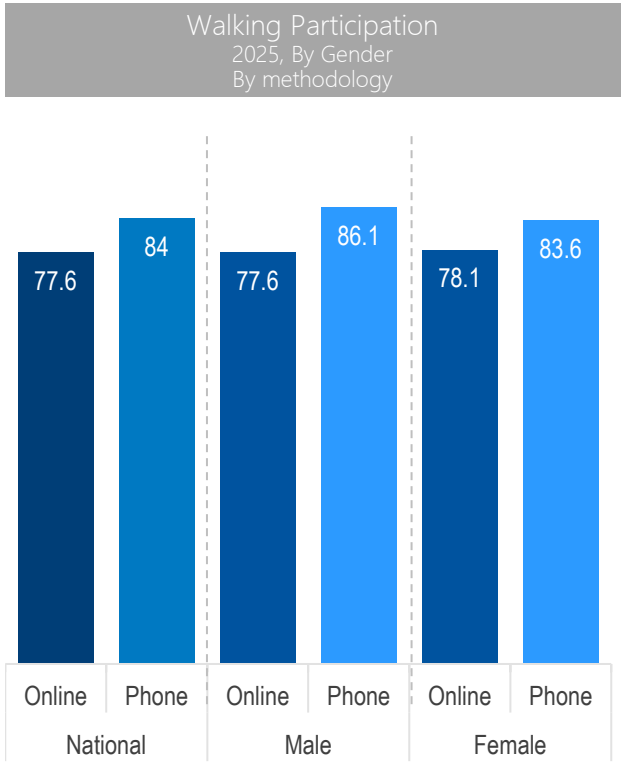
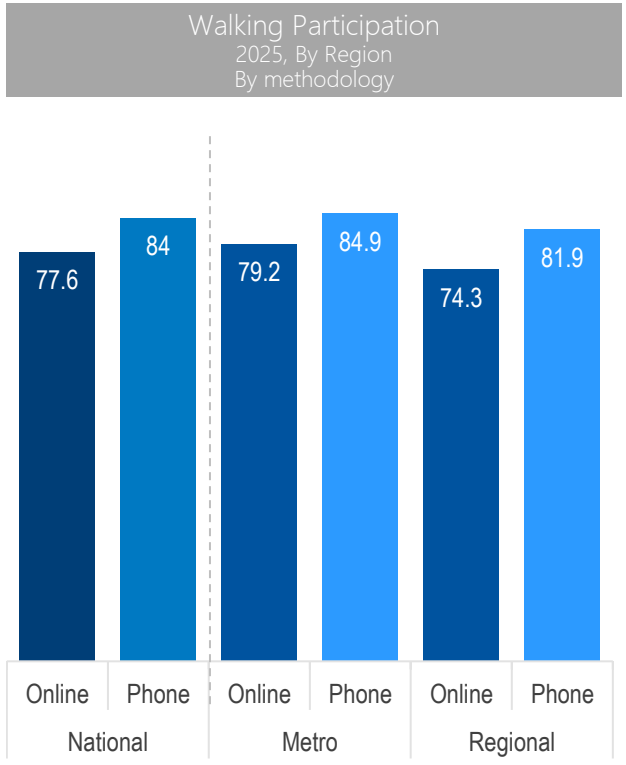
Walking Participation (Gender & Location)
by methodology





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Base: All respondents; online (n=6,482), phone (n=5,704).

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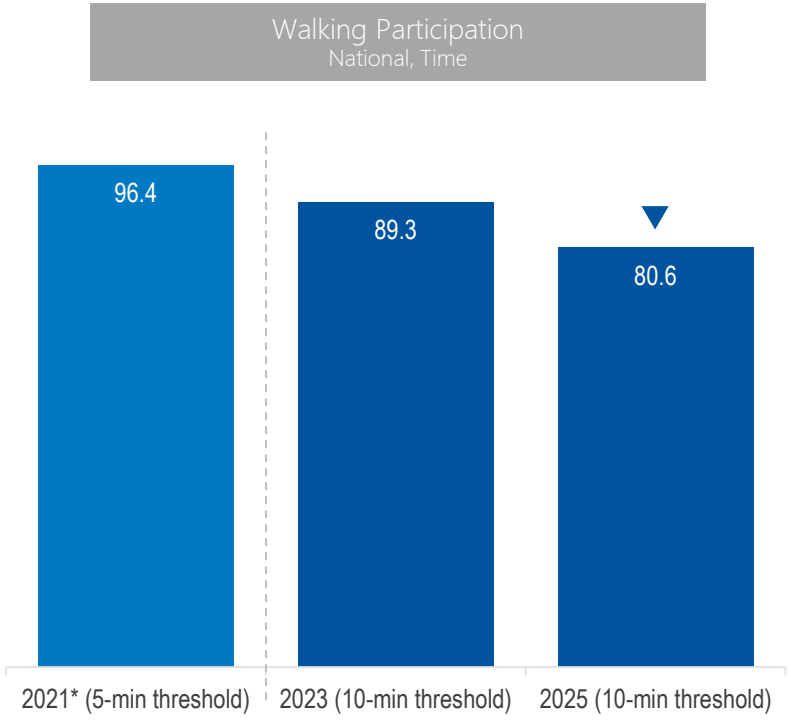
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

While the data shows a decline in walking participation from 2021 to 2025, this trend should be interpreted cautiously due to methodological changes and possible post-COVID normalisation.

While walking participation appears to have declined between 2021 and 2023, this trend should be interpreted with caution. The 2021 result used a 5-minute walking threshold, compared to the 10-minute threshold used in 2023 and carried into 2025, making direct comparison not possible.

Additionally, 2021 may reflect a short-term behavioural spike during the COVID-19 period, when more people were walking for exercise or mental health – and we see evidence of this in the cycling data which extends back to 2015.

The observed drop from 89% in 2023 to 81% in 2025 may partly reflect changes in survey methodology, with the 2025 results incorporating a substantial online sample less prone to social desirability bias. In addition, wet weather and cyclonic conditions during the survey period may have temporarily impacted participation, particularly in Queensland and northern NSW.



Q6 / Q39. In the last 7 days, have you walked / used your wheelchair or mobility scooter for 10 minutes or more, somewhere outside of your home?
Base: All Respondents, 2021 (n=11,003), 2023 (n=8,804), 2025 (n=12,186)
*NOTE: The 2021 survey used a threshold of five rather than ten minutes walking duration – as a result significance testing was not applied between 2021 to 2023 data. 2023 data uses a threshold of ten minutes, in line with 2025 data

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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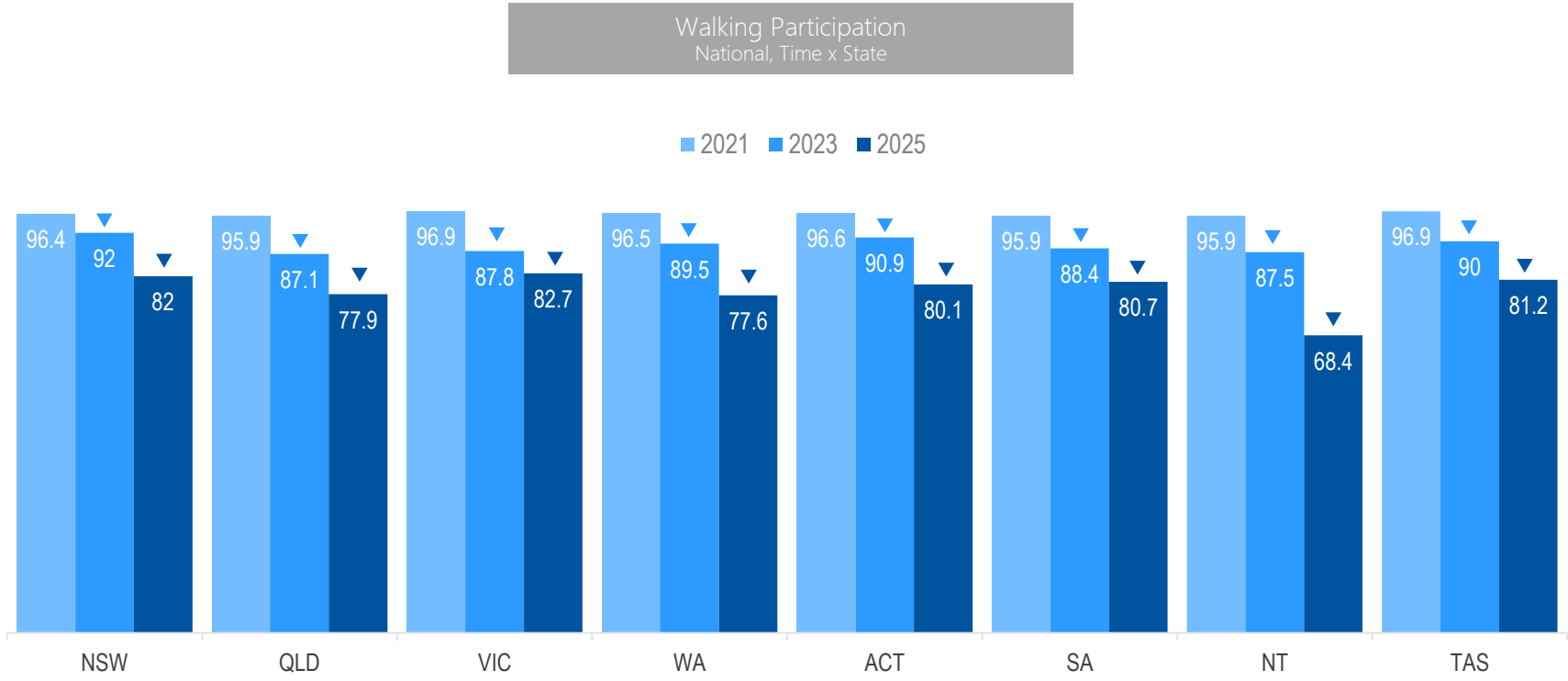
This trend is seen across all states…

… with NT seeing the largest drop between 2023 and 2025 (19%).



Q6 / Q39. In the last 7 days, have you walked / used your wheelchair or mobility scooter for 10 minutes or more, somewhere outside of your home?
Base: All Respondents
*NOTE: The 2021 survey used a threshold of five rather than ten minutes walking duration – as a result significance testing was not applied between 2021 to 2023 data. 2023 data uses a threshold of ten minutes, in line with 2025 data

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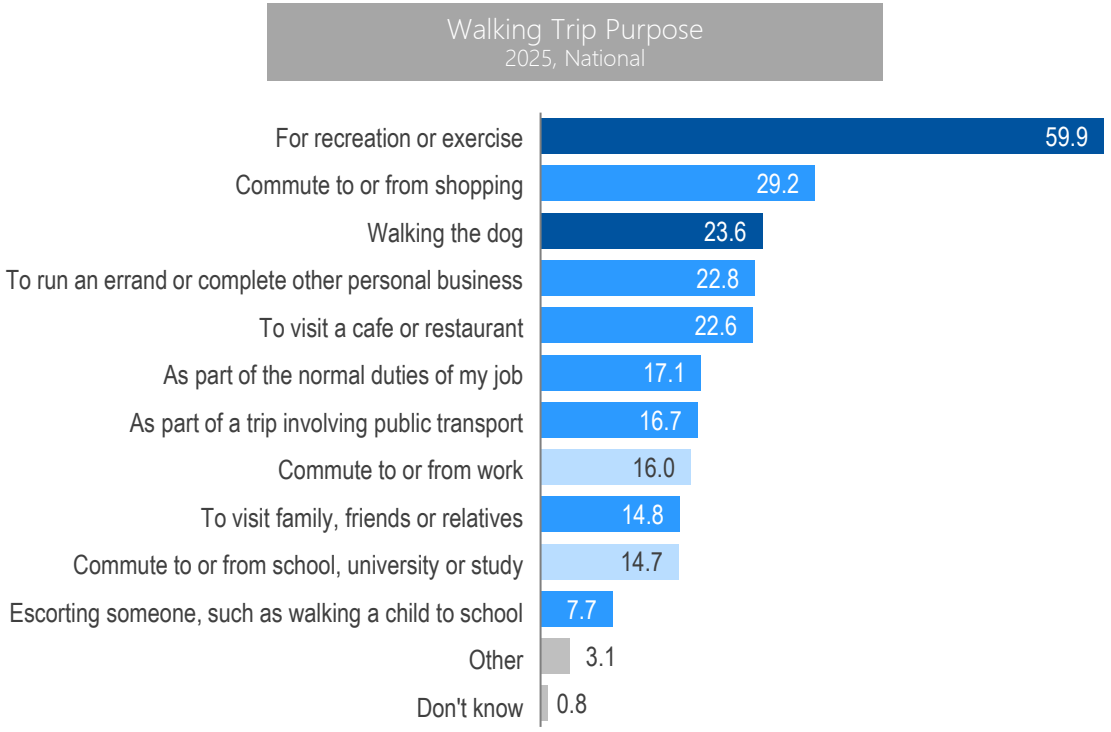
The most common reason for walking is for recreation or exercise.

In addition, Commuting to or from work or school takes up more than a quarter of Australians' reason for walking in the past 4 weeks. In addition, about a quarter do so to walk their dog, to run an errand and to visit a café or restaurant.



NET Transport: 73.0%

Transport is a NET for all transport related trips (inclusive of commuting), excluding recreation, walking the dog, others, don't know.

NET Commuting: 28.7%

Commuting is a NET for 'commuting to or from work or school.'

NET results will add to less than the sum of the individual responses as this is a multiple response question.

Q11 / Q58. During the past 4 weeks, have you walked for at least 10 minutes for any of the following purposes?
Base: All respondents who have walked in the past 4 weeks, 2025 (n=10,718)

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While recreation and walking is the biggest reason for walking across all states, there are some nuances as well.

NSW residents are most likely to walk as part of their work commute, whereas ACT residents are more likely to walk for a wide range of reasons, including errands, school, and visiting others.

Walking Trip Purpose
2025, State

**Boxes in the chart highlights the state(s) with the highest proportion of respondents walking for each purpose.*

	NSW	QLD	VIC	WA	ACT	SA	NT	TAS
For recreation or exercise	60.3	60.9	58.2	60.2	63.0	61.6	47.4	62.3
Commute to or from shopping	29.1	26.7	32.9	26.1	33.1	28	26.8	26.4
Walking the dog	19.2	25.5	26	25.8	23.1	25.6	22.3	27.8
To run an errand or complete other personal business	21.5	23.2	24.3	20.4	23.7	24.6	25	23.8
To visit a cafe or restaurant	24.4	20.8	23.2	19.4	25.6	22.3	16.9	23.6
As part of the normal duties of my job	15.6	20.5	16	17.3	18.3	16	26.5	18
As part of a trip involving public transport	17.5	14.1	20.5	14.2	17.7	13.9	5.2	10.3
Commute to or from work	17.5	14.4	17.1	13.5	15.3	14.9	15	12.6
To visit family, friends or relatives	15.8	13.5	15.4	13.2	15.7	13.5	15.3	16.4
Commute to or from school, university or study	15.2	12.6	17	13.8	17.1	12.2	13	13.7
Escorting someone, such as walking a child to school	8.7	6.8	8	7.7	6.4	5.5	6.9	7.3
Other	3.2	3.2	2.9	3.8	1.8	3.3	1.6	2.6
Don't know	0.9	1	0.3	0.9	0.8	0.5	1.3	1.8

Q11 / Q58. During the past 4 weeks, have you walked for at least 10 minutes for any of the following purposes?
Base: All respondents who have walked in the past 4 weeks, 2025 (n=10,718), NSW (n=1,629), QLD (n=2,217), VIC (n=949), WA (n=2,216), ACT (n=1,009), SA (n=897), NT (n=910), TAS (n=891).

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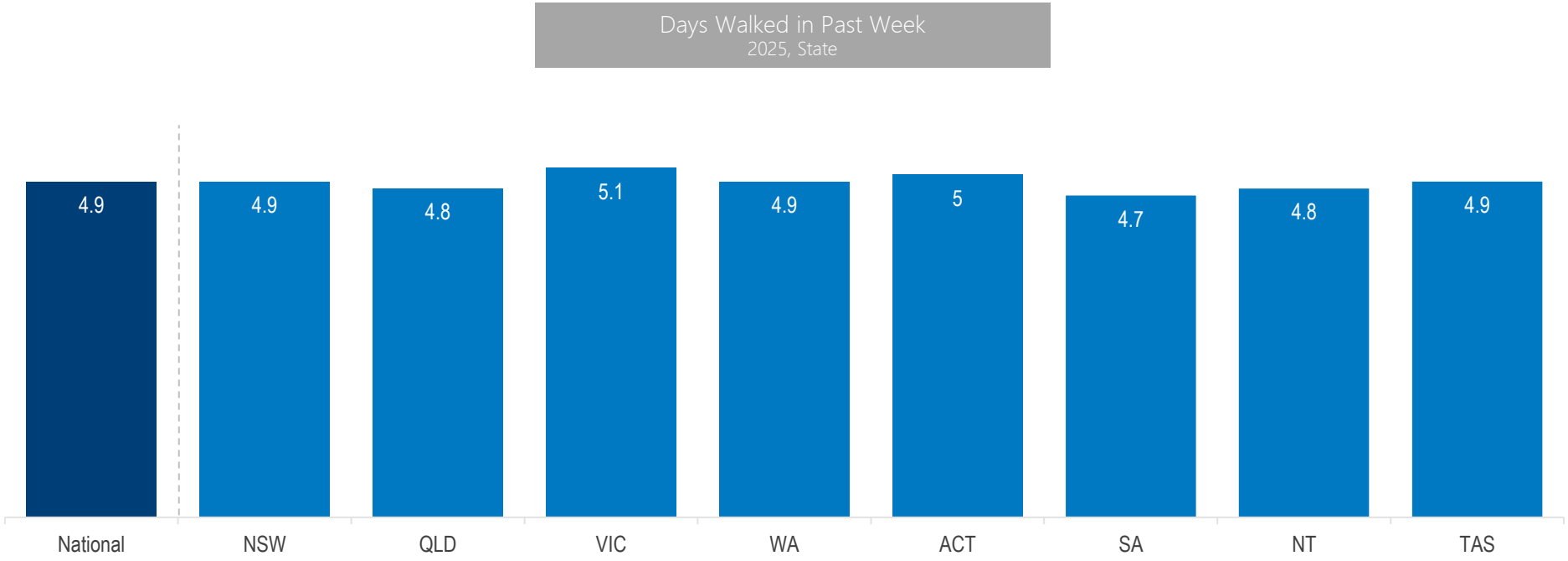
On average, Australians walk 4.9 days in a week.

This frequency is highest amongst VIC residents and lowest amongst SA residents with a deviation of 0.4 days.



Q9. In the last 7 days, how many days did you walk for at least 10 minutes?

Base: Main respondents who have walked for at least 10 minutes in the last 7 days (n=4,359)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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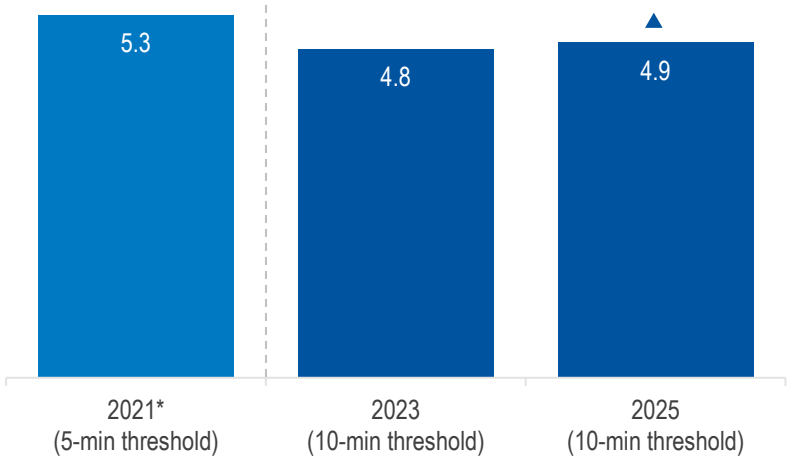
Walking frequency increased slightly from 2023 to 2025.

Walking frequency has increased slightly since 2023, with participants walking on more days per week in 2025 (4.93 vs 4.76). However, comparisons with 2021 should be treated cautiously, as that year used a 5-minute walking threshold (vs 10 minutes in 2023 and 2025), and may reflect an atypical COVID-19 peak.

The 2023 - 2025 increase may indicate greater consistency or commitment among active walkers, even as overall participation levels decline.

Average Days Walked in Past Week (n)
National, Time



Q9. In the last 7 days, how many days did you walk for at least 10 minutes?
Base: Main respondents who have walked for at least 10 minutes in the last 7 days, 2021 (n=4,367), 2023 (n=3,414), 2025 (n=4,359)
*NOTE: The 2021 survey used a threshold of five rather than ten minutes walking duration – as a result significance testing was not applied between 2021 to 2023 data. 2023 data uses a threshold of ten minutes, in line with 2025 data

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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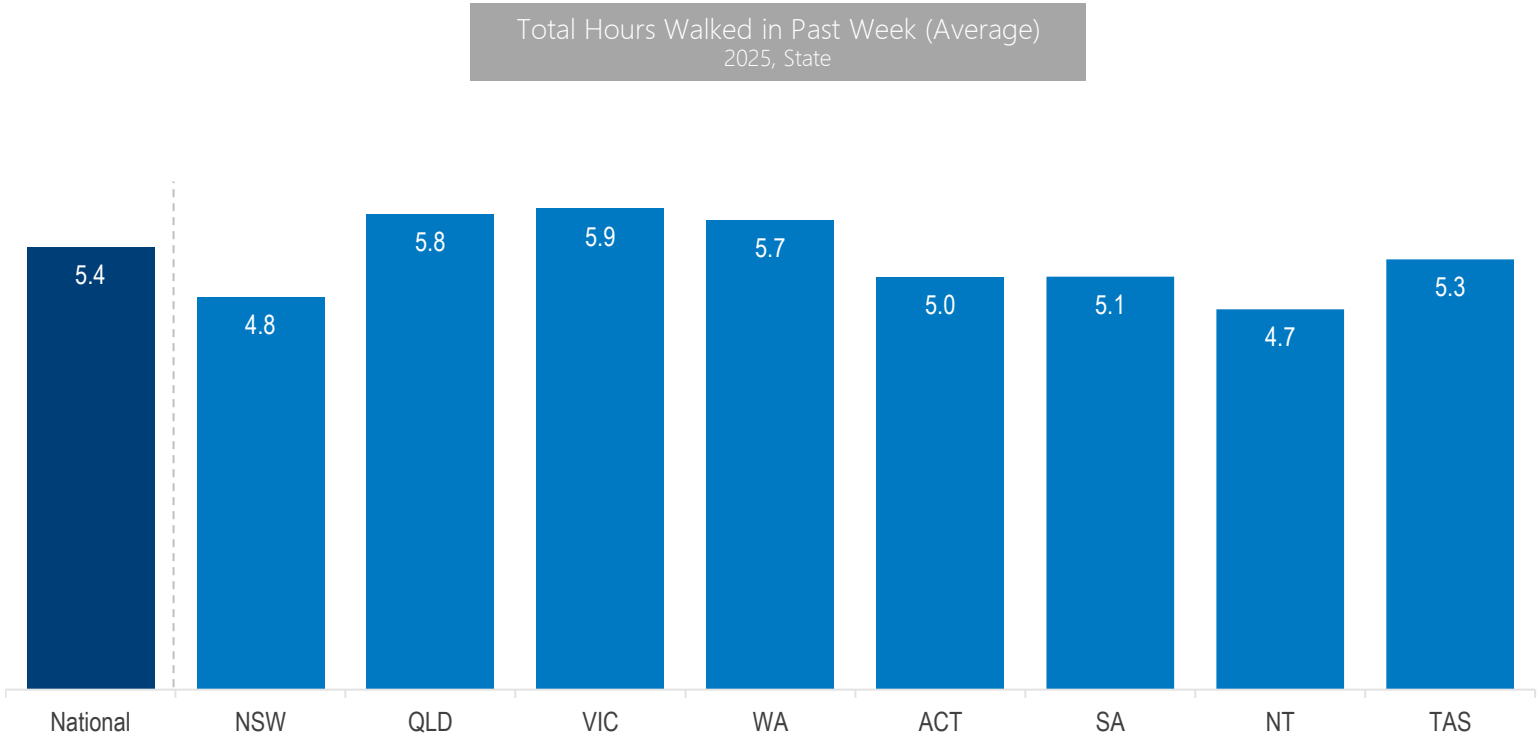
Australians walk around 5.41 hours a week on average…

… with VIC residents again walking the greatest number of hours a week at 5.88 hours. In comparison, NT residents walk on average 4.65 hours a week, a difference of more than 1 hour.



Q10. What is your best estimate of the total time you have spent walking over the past 7 days?
Base: Main respondents who have walked for at least 10 minutes in the last 7 days (n=4,359)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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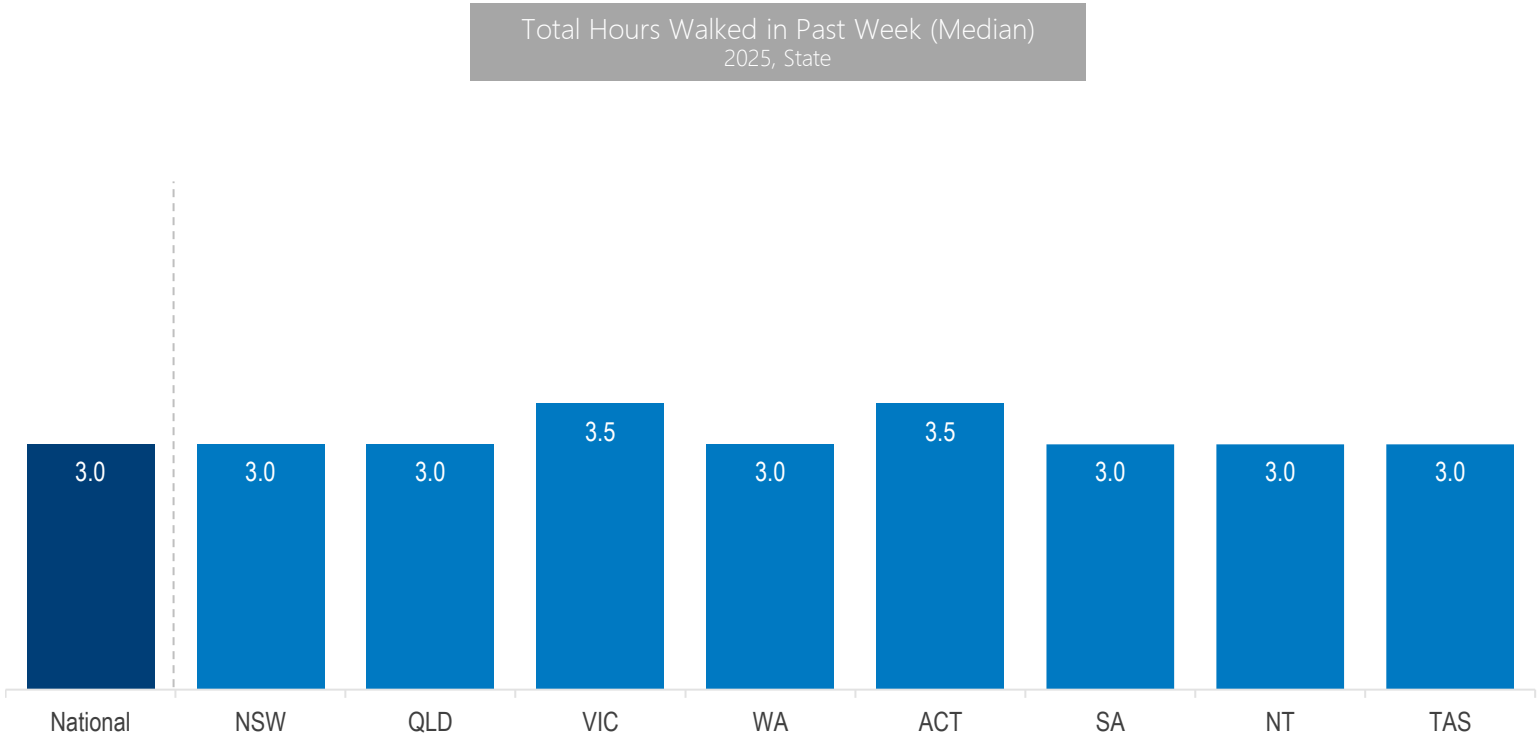
The median total hours spent walking in the past week was 3 hours…

… with VIC and ACT residents the highest across all states and territories.



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Base: Main respondents who have walked for at least 10 minutes in the last 7 days (n=4,359)

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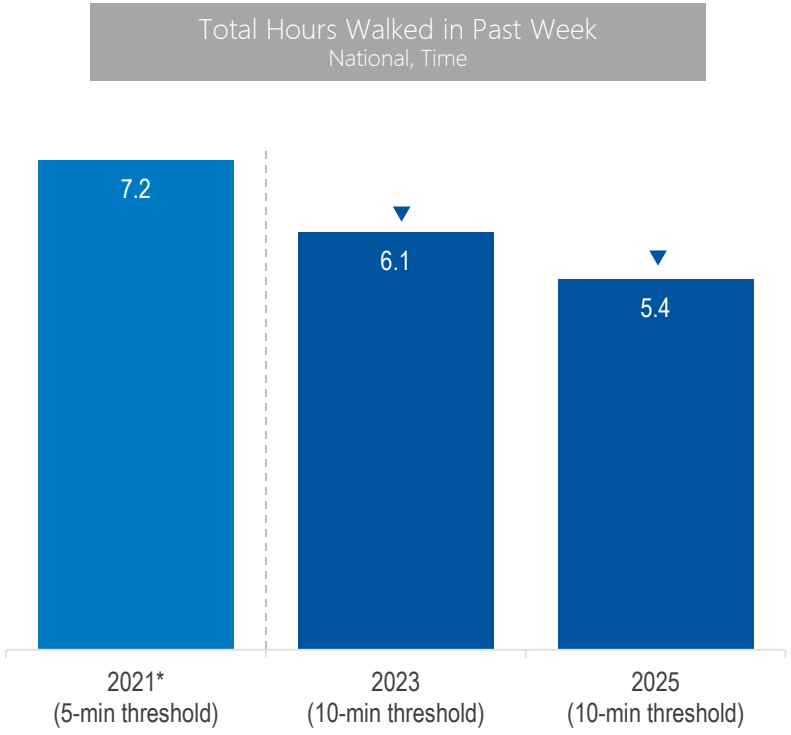
Again, total hours walked amongst Australians have trended downwards.

While average total walking time has declined since 2021, this trend must also be interpreted in light of key changes in survey methodology and broader contextual factors. The 2021 data used a 5-minute walking threshold and likely reflects peak walking behaviour during COVID-19 restrictions.

From 2023 to 2025, when a consistent 10-minute threshold was applied, total hours walked per week decreased significantly, suggesting that although some Australians are walking more frequently, they may be walking for shorter durations each time.



Q10. What is your best estimate of the total time you have spent walking over the past 7 days?
Base: Main respondents who have walked for at least 10 minutes in the last 7 days, 2021 (n=4,249), 2023 (n=3,336), 2025 (n=4,359)
*NOTE: The 2021 survey used a threshold of five rather than ten minutes walking duration – as a result significance testing was not applied between 2021 to 2023 data. 2023 data uses a threshold of ten minutes, in line with 2025 data

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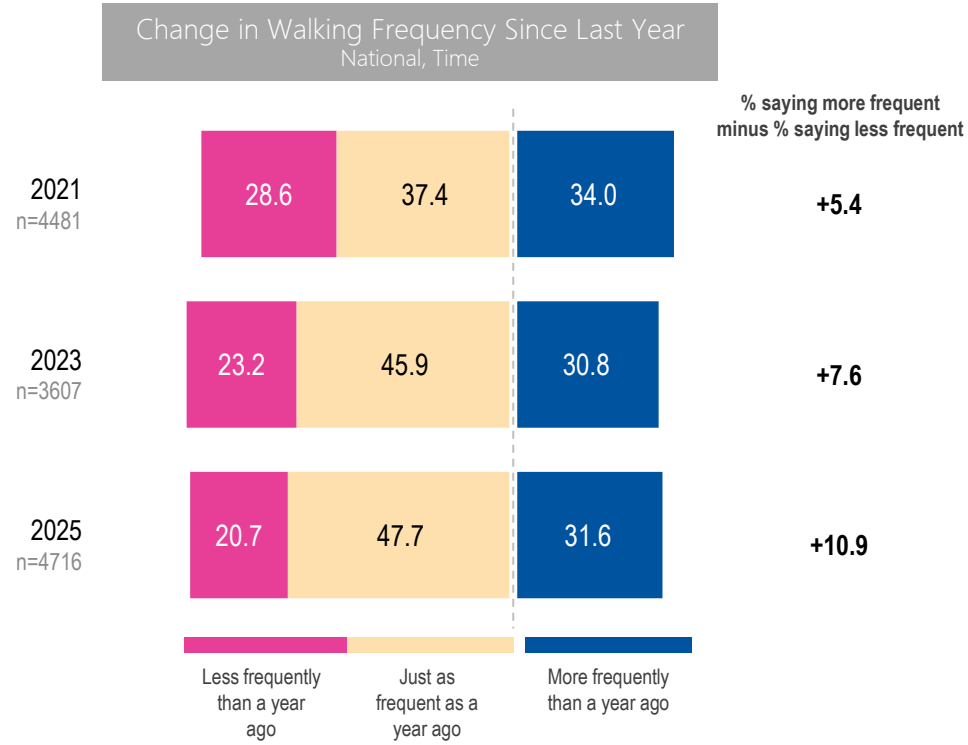
Even though actual walking frequency has dropped, people still perceive themselves to be walking more frequently.

Despite a decline in objectively measured walking frequency and total hours, perceptions of increased walking have grown steadily, with a net +12 in 2025. This mismatch likely reflects people's tendency to recall purposeful or recreational walks over incidental or habitual ones. It may also suggest positive sentiment or intent around walking, even if behaviours haven't kept pace.

This perception / reality gap highlights the importance of combining self-reported behavioural sentiment with measured frequency and time data for a balanced view.

While participation and total time spent walking has declined since 2021, the steady rise in perceived frequency suggests that walking remains psychologically salient and valued, even as time pressures or environmental factors may reduce actual behaviour.



Q12. And how much more or less frequent would you say that you are walking now compared to a year ago?
Base:Main respondent who walked in the past year

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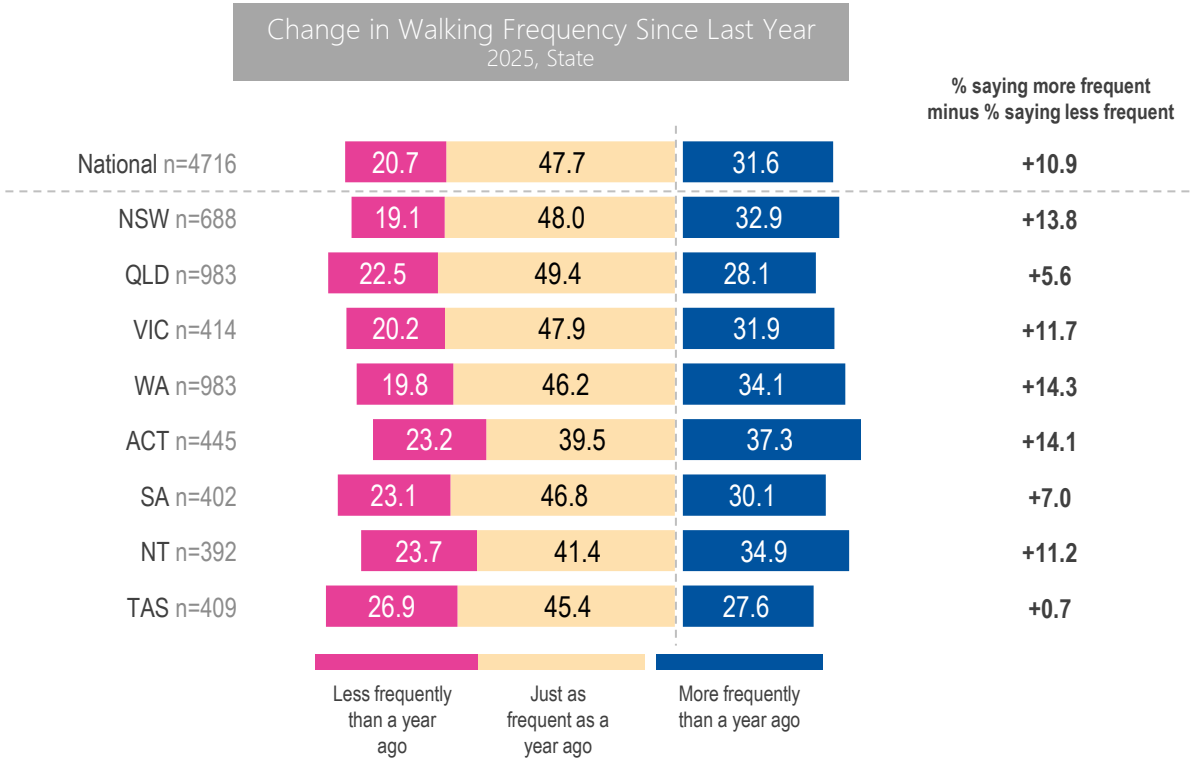
NSW, WA and ACT residents claim to see the largest positive change in walking frequency since 2024.



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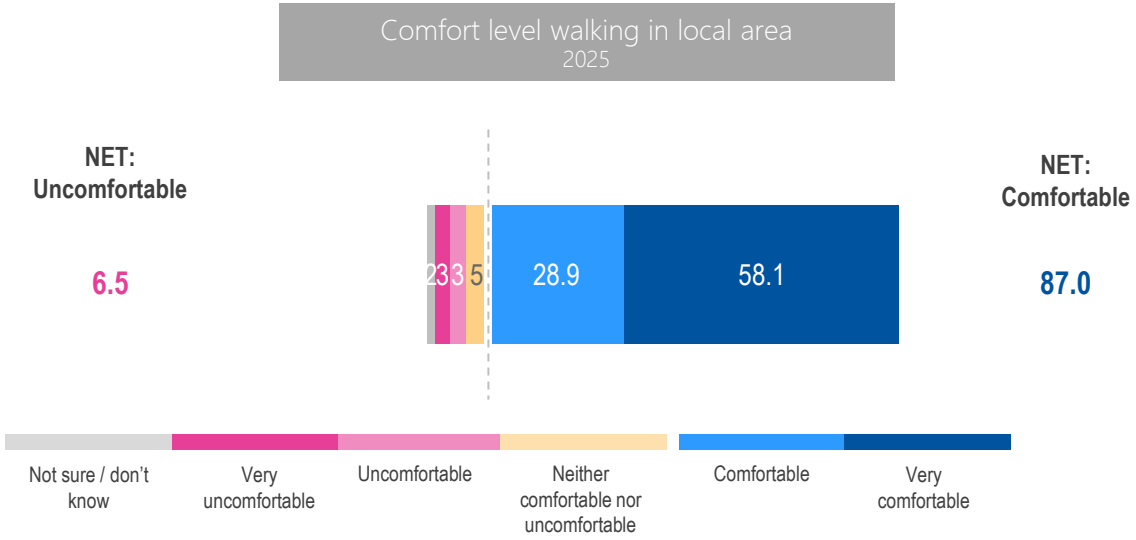
The majority are comfortable walking in their local area…

This is a new measure introduced this wave, with close to 3 in 5 indicating they are very comfortable doing so.



Q53. How comfortable are you when walking, riding your bike, or using your wheelchair or mobility scooter in your local area?
Base: Main respondents who walked for at least10 mins in the last year (n=4,716)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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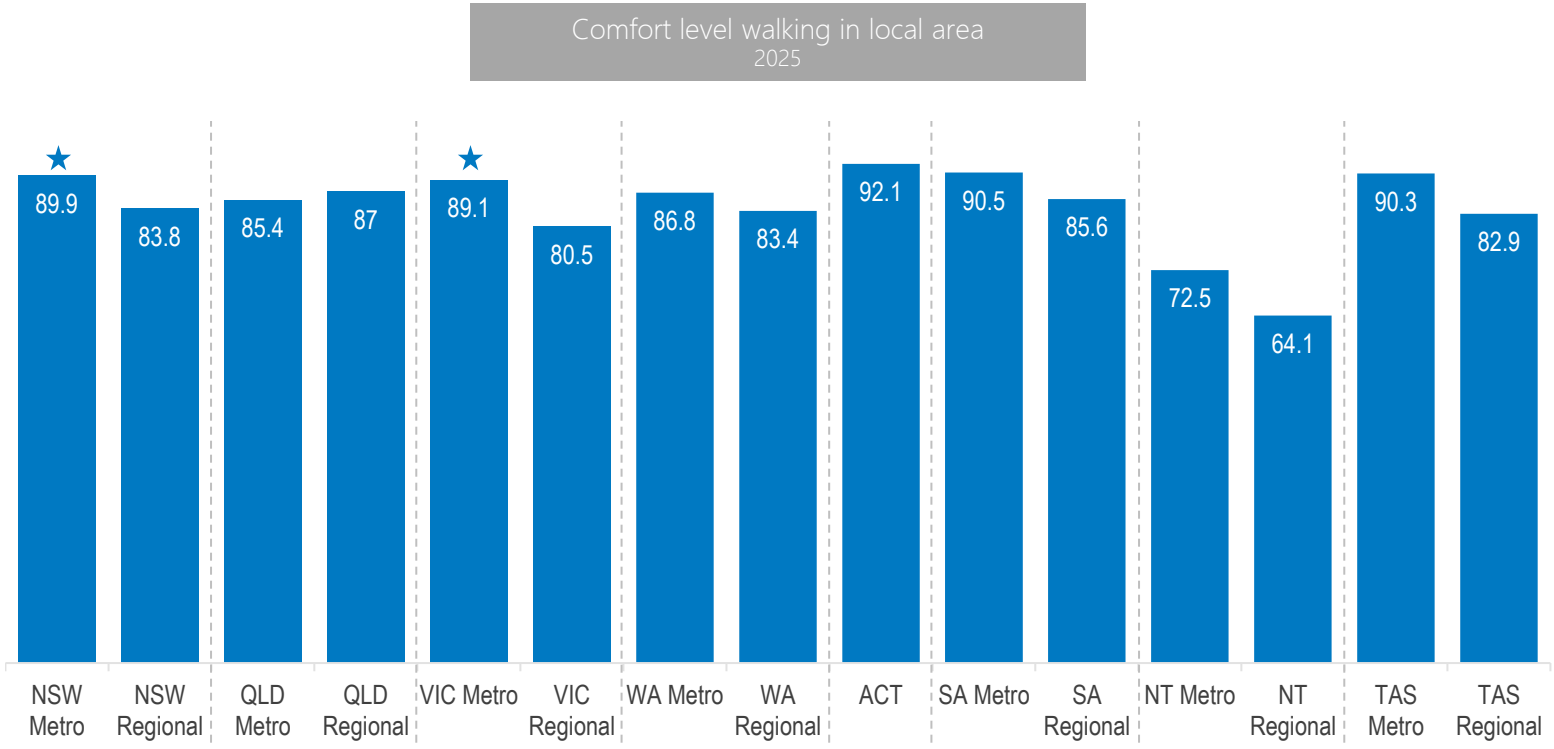
NT residents feel relatively less comfortable walking in their areas.

Those living in metro NSW and VIC tend to be significantly more comfortable walking in their local area than their regional counterparts. However, level of comfort is generally high overall, with more than 4 in 5 across most states feeling comfortable.

NT metro and NT regional stand out however and this result supports the large decrease in walking participation seen earlier.



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Base: Main respondents who walked for at least10 mins in the last year (n=4,716)

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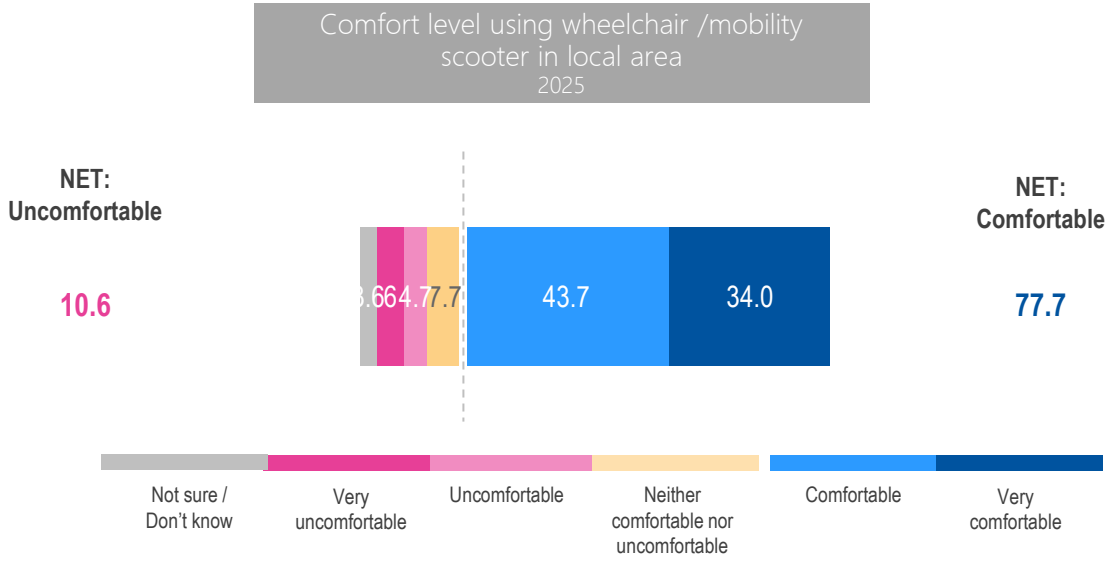
Amongst those who use a wheelchair / mobility scooter, 8 in 10 overall are comfortable using it in their local area.

This is a new measure introduced this wave, with one third indicating they are very comfortable doing so.



Q53. How comfortable are you when walking, riding your bike, or using your wheelchair or mobility scooter in your local area?
Base: Main respondents who used a wheelchair / mobility scooter in the last 7 days (n=68)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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CWANZ
CYCLING AND WALKING
AUSTRALIA AND NEW ZEALAND

Cycling – Participation, Trip Purpose, Frequency and Duration

Definition of cycling

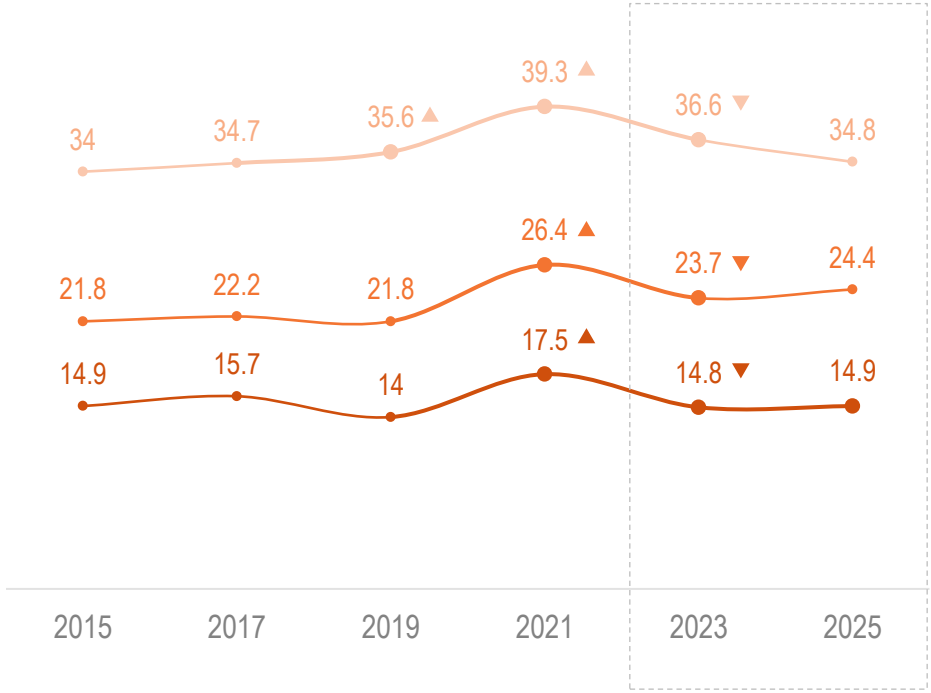
Cycling was defined as riding a push bicycle or electric bicycle for any purpose, in any location and of any duration. The definition of a bicycle included any device with two or more wheels that can be pedaled.

It excludes devices such as children's tricycles or kick or balance bicycles that lacks pedals, scooters, stationary exercise bicycles and motorised devices that require a licence such as mopeds or motorcycles.

NOTE: The survey referred to electric bicycles as any bike that can be pedalled and has an electric motor. However, no distinction was made between legally compliant and non-compliant devices. As such, reported usage may include e-bikes that do not meet local road-legal specifications (e.g. throttle-controlled or high-powered models), particularly in states with known enforcement challenges.

Weekly cycling participation remains below 2021 levels, while monthly and yearly rates are stabilising.

Cycling participation peaked during COVID in 2021 but has since returned to levels consistent with previous long-term trends.



**The percentages shown for past years data are different to previously published NWCPS reports due to changes in the weighting approach applied in this report and fitted to previous years' data for accurate comparability.*

Q4 / Q37. Have you used any of the following modes of transport in the last 7 days? Base: All respondents (n=12,186)
Q14 / Q41. When did you last ride a bicycle? Base: All Respondents who did not use a bicycle in the last 7 days (n=10,287)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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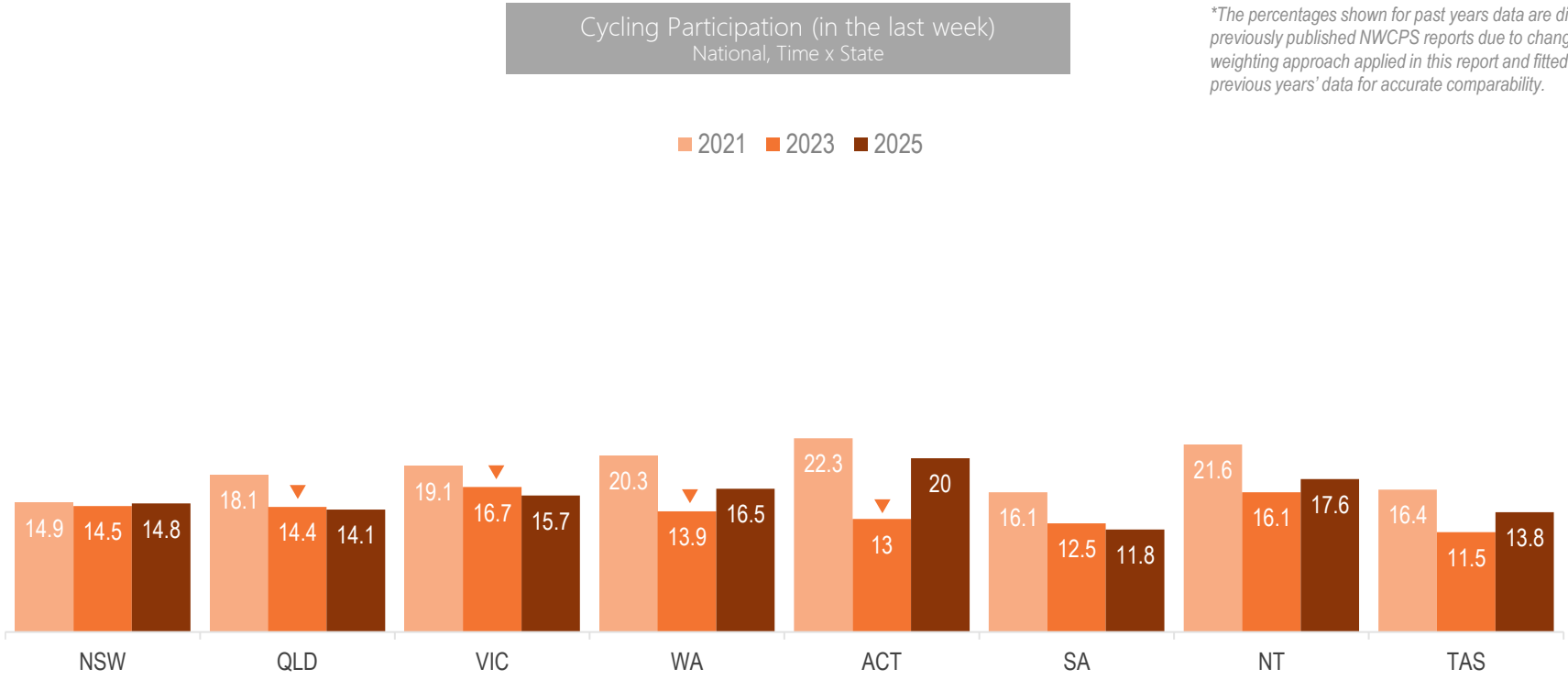
Cycling participation has declined in every state since 2021, except NSW where it remained steady.

Although most states saw declines from 2021, WA, ACT, NT and TAS recorded slight increases from 2023 to 2025, suggesting a potential shift in recent behaviour, particularly in urban centres.

**The percentages shown for past years data are different to previously published NWCPS reports due to changes in the weighting approach applied in this report and fitted to previous years' data for accurate comparability.*



Q4 / Q37. Have you used any of the following modes of transport in the last 7 days?
Base: All respondents , 2021 (n=11,415), 2023 (n=9,189), 2025 (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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About a quarter cycle monthly, but ACT leads the way

ACT leads the nation for monthly cycling participation at 31%, well above the national average of 24%, while SA records the lowest at 21%.

For yearly participation, VIC, WA, ACT, and NT all exceed the national rate of 35%, with ACT topping the list at 40%.

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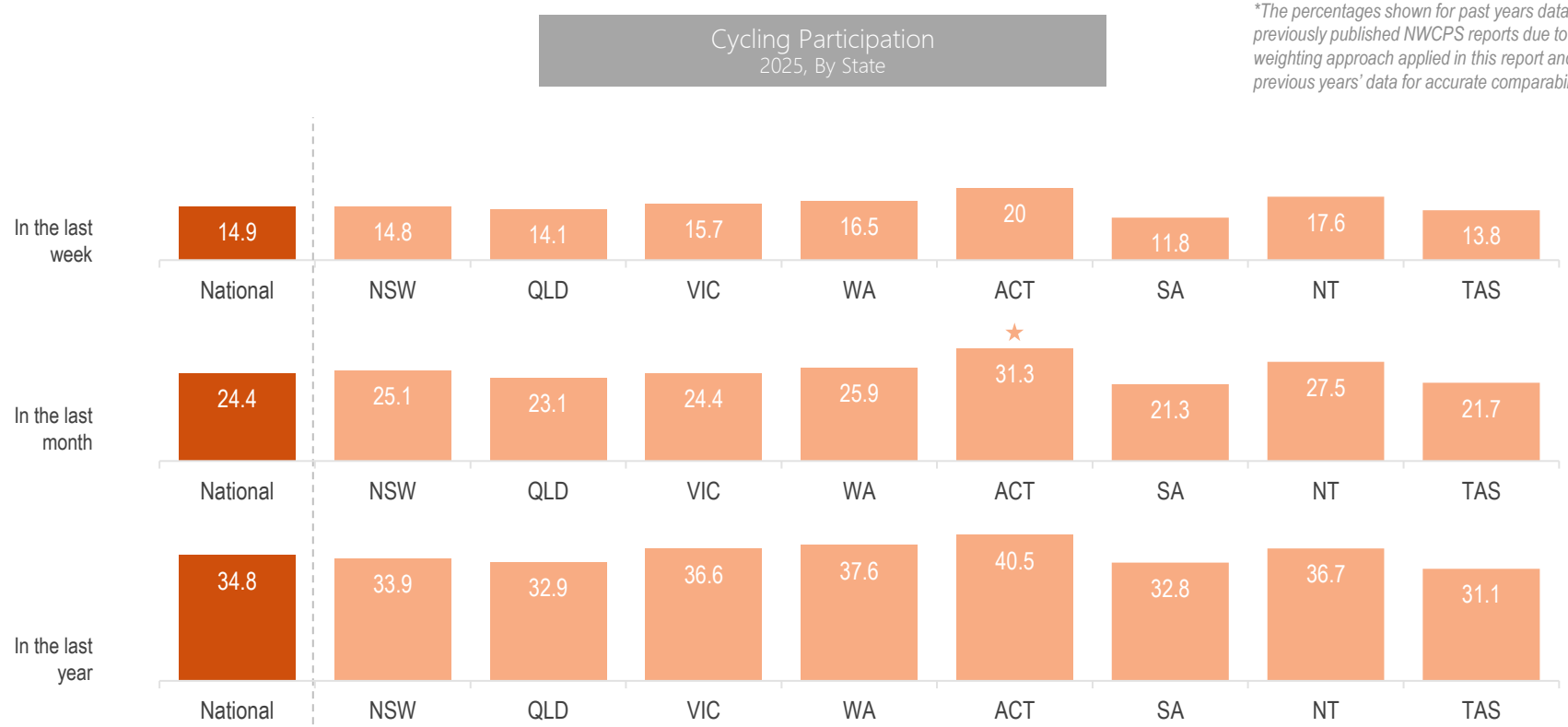

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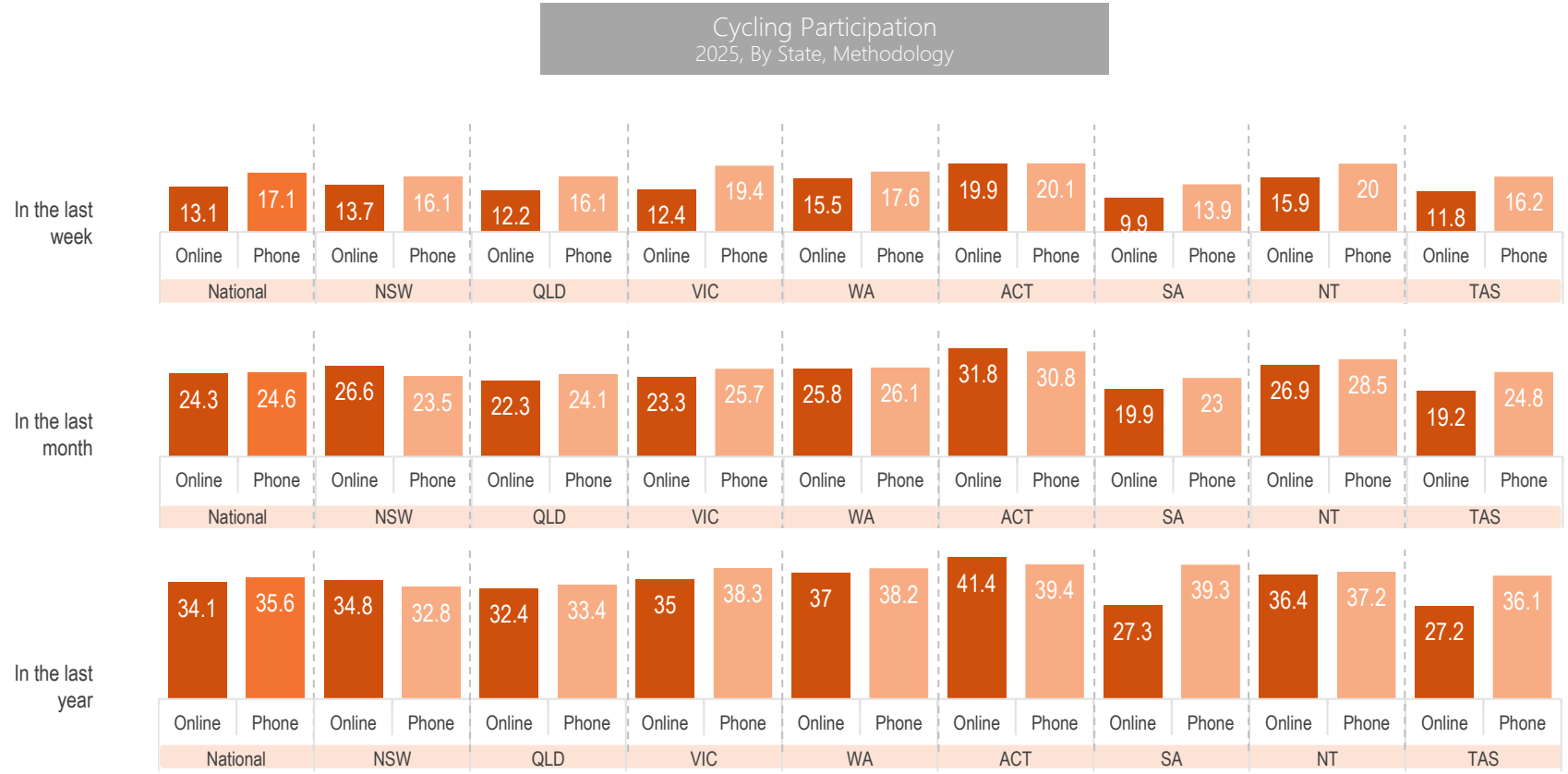
Cycling Participation (state)
by methodology

Literature indicates that social desirability bias is more pronounced in interviewer-administered surveys, such as telephone interviews, compared to self-administered online surveys. As such, behaviours perceived as socially desirable, like walking or cycling, may be over-reported in CATI responses relative to online survey responses.



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Base: All respondents (n=12,186)
Q14 / Q41. When did you last ride a bicycle? Base: All Respondents who did not use a bicycle in the last 7 days (n=10,287)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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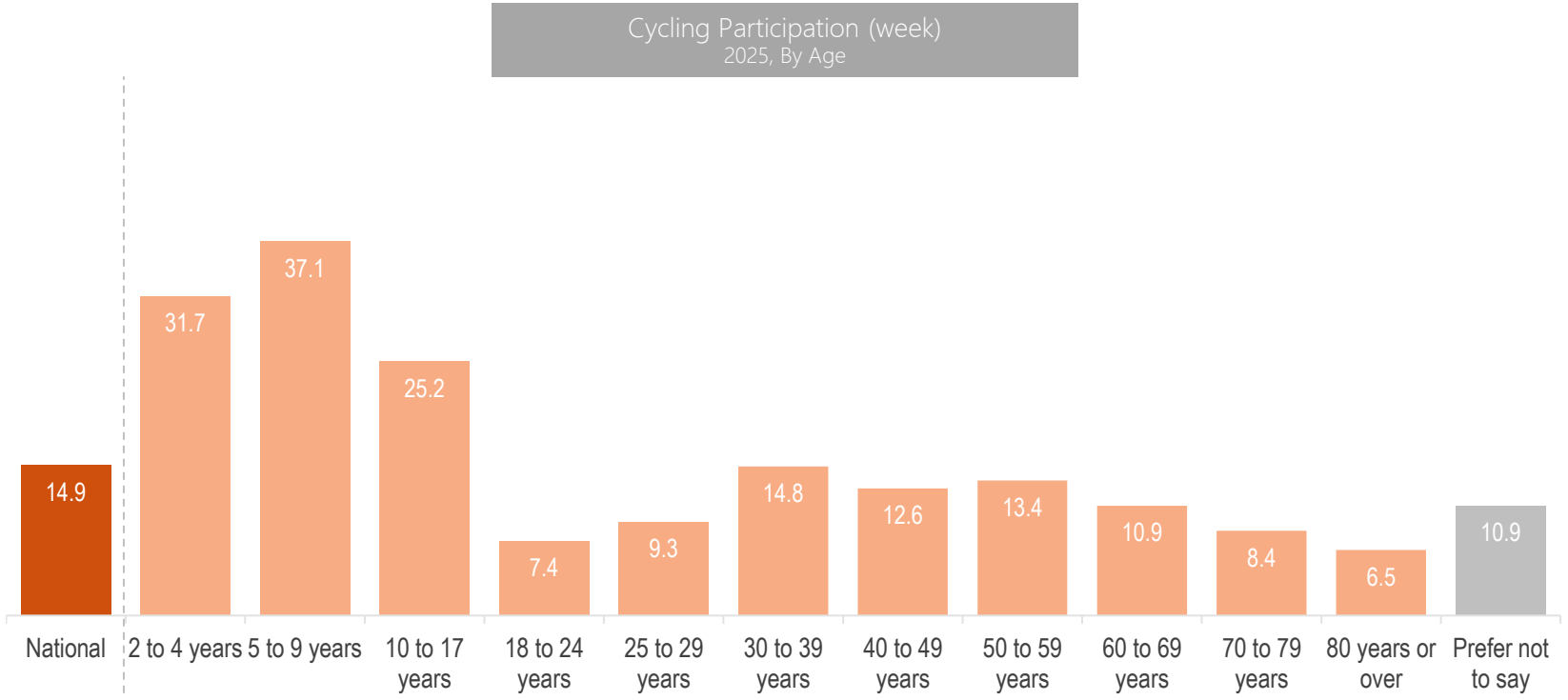
Cycling is most common among those aged 17 years and under.

Weekly cycling is most common among children, peaking at 37% for ages 5-9. By comparison, participation drops to just 7-15% for most adult age groups and falls further beyond age 70.

The steepest decline occurs between ages 10-17 and 18-24, suggesting a key transition point where cycling habits often fall away.



Q4 / Q37. Have you used any of the following modes of transport in the last 7 days?
Base: All respondents (n=12,386)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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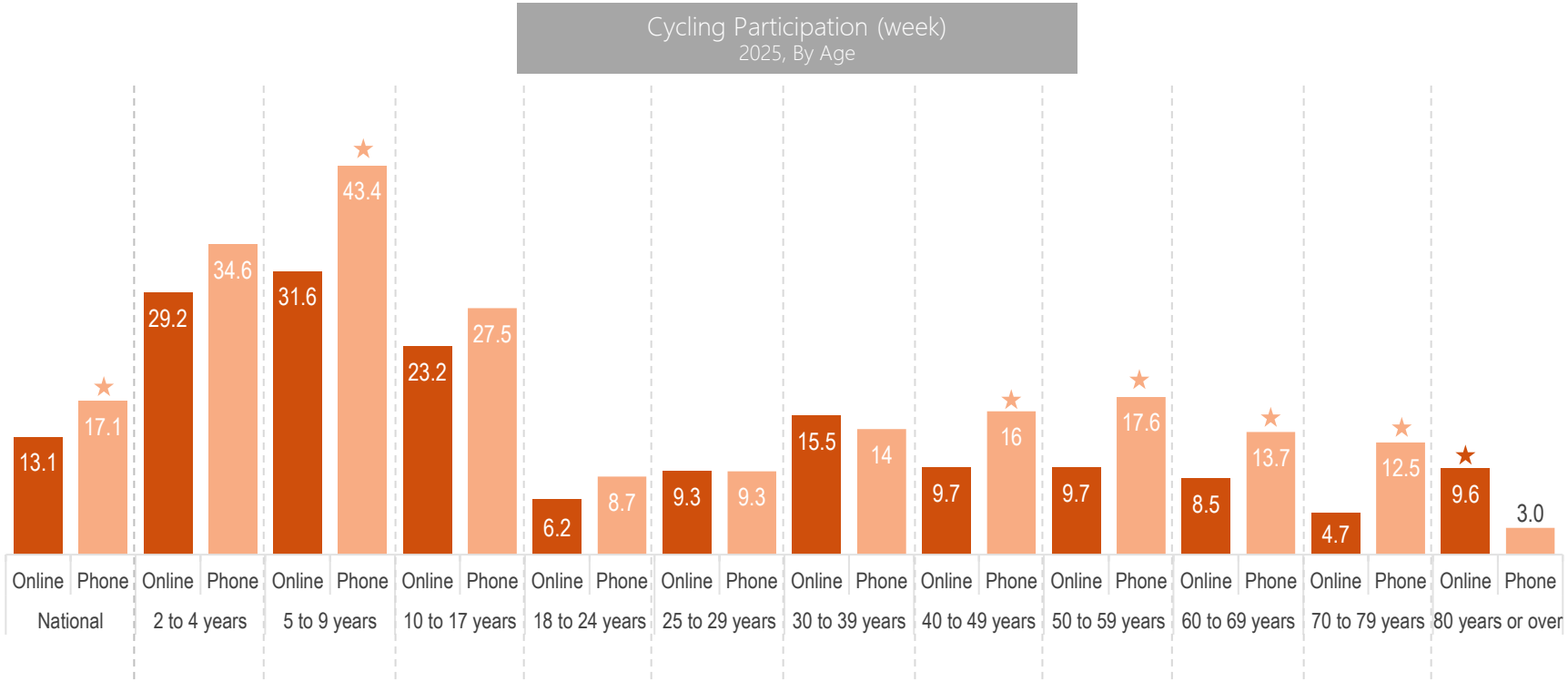
Cycling Participation (age)
by methodology



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Base: All respondents (n=12,386)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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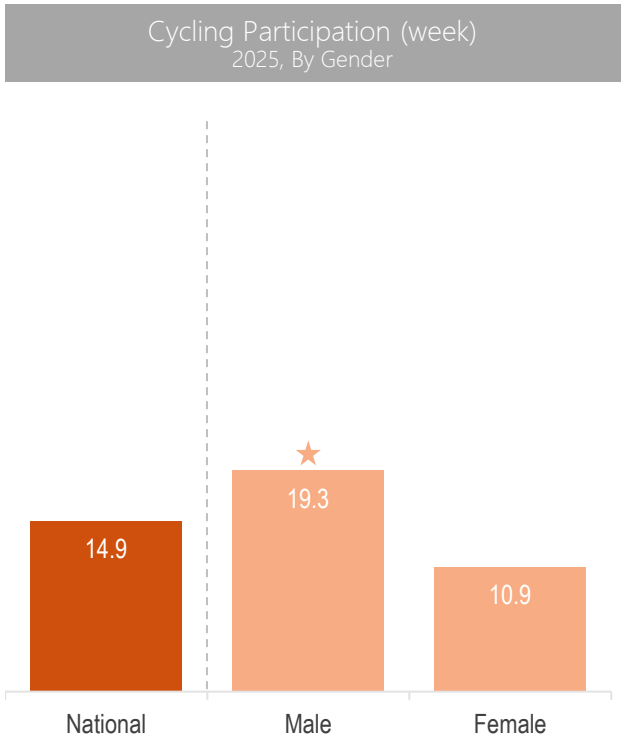
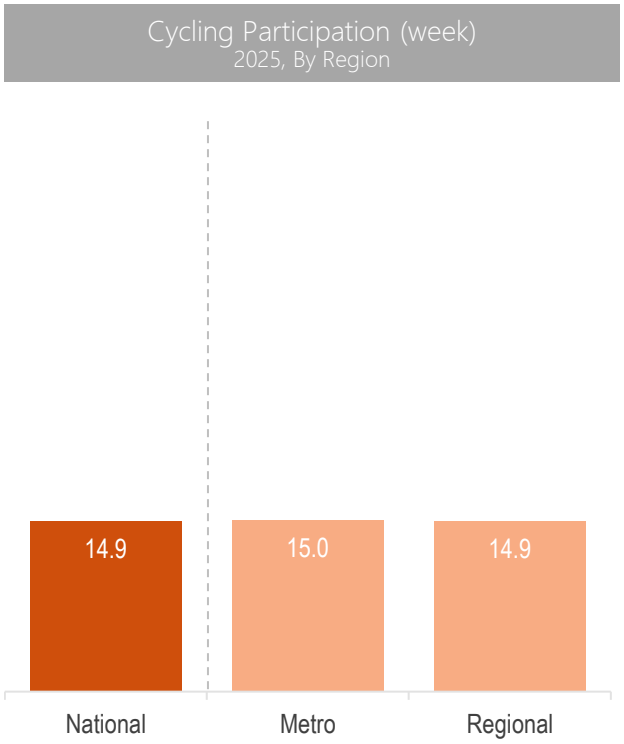
Significantly more males cycle on a weekly basis, but this is equal amongst those living in metro and regional areas.





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- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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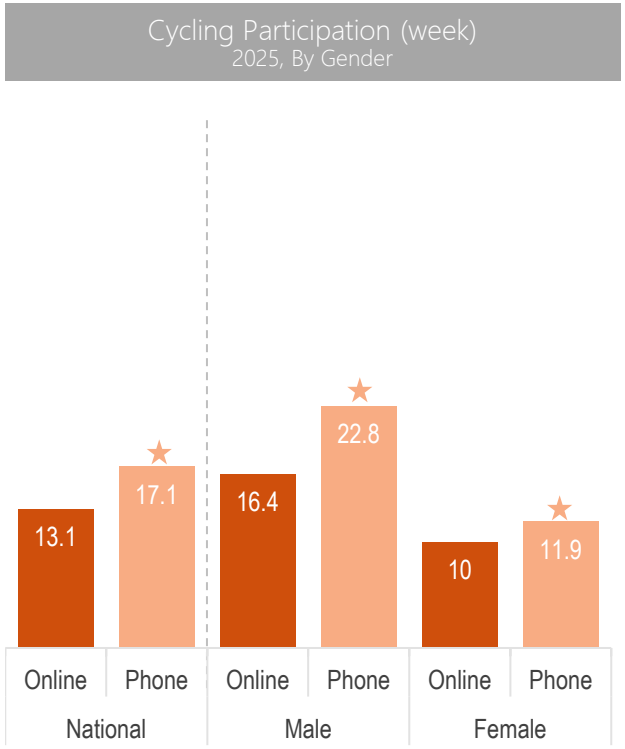
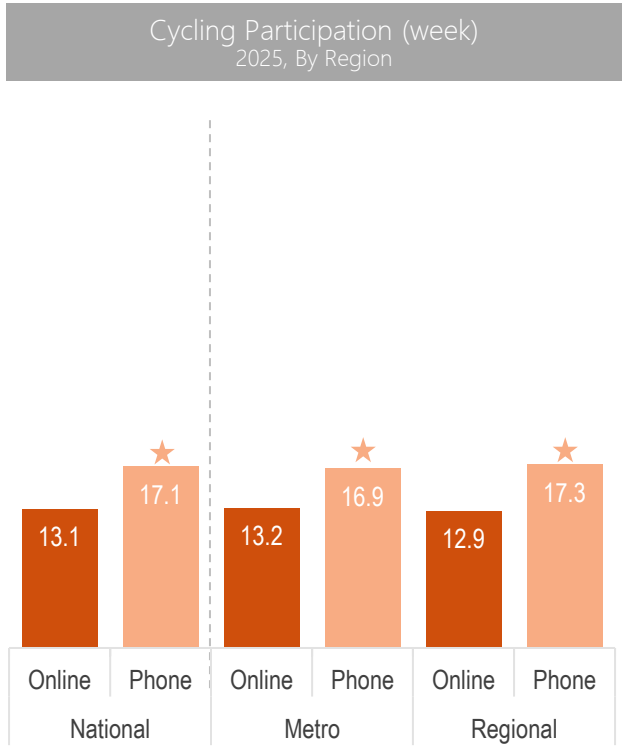
Cycling Participation (gender & location)
by methodology

Literature indicates that social desirability bias is more pronounced in interviewer-administered surveys, such as telephone interviews, compared to self-administered online surveys. As such, behaviours perceived as socially desirable, like walking or cycling, may be over-reported in CATI responses relative to online survey responses.





Q4 / Q37. Have you used any of the following modes of transport in the last 7 days?
Base: All respondents (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

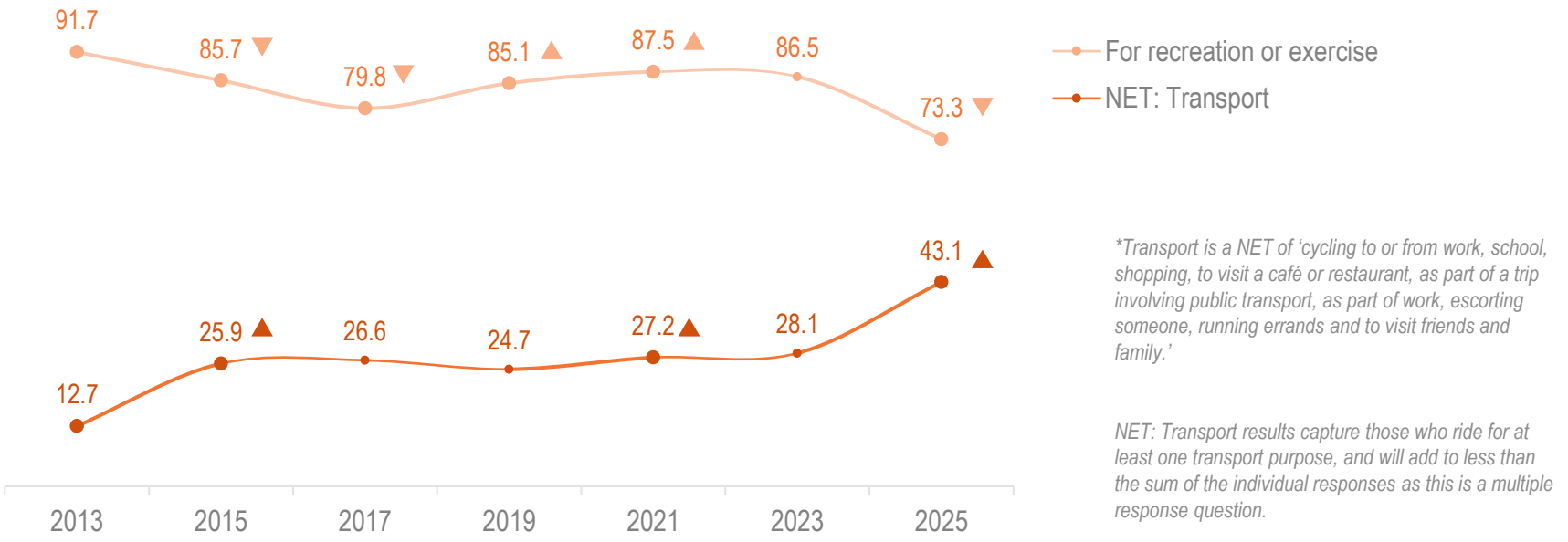
Cycling is increasingly seen as a practical transport mode, not just for recreation.

In 2025, significantly more Australians reported cycling for transport (43%) than in any previous wave, while recreational cycling dropped to 73%. This shift likely reflects broader economic pressures, such as cost-of-living increases, higher petrol prices, and rising public transport fares, prompting people to view cycling as a practical, low-cost alternative for commuting and errands.

The growth in e-bike use and post-2020 infrastructure upgrades (like safer bike lanes and off-road paths) may be enabling more diverse riders to take up cycling for transport. Meanwhile, Some former recreational cyclists may now identify their riding as utility-based, while others are simply cycling less due to time, financial, or lifestyle pressures.

Two new options were included in this wave: 'escorting someone' and 'as part of work'. Whilst it is possible these options have added to the increase observed for NET: Transport in 2025, it is unlikely they are solely responsible due to the way NET: Transport is calculated. A breakdown of each transport trip purpose option tracked over time (page 57) illustrates that transport trips for commute purposes, shopping and trips involving public transport have all increased significantly in 2025 compared with 2023, indicating that these activities are also responsible for influencing an uptick in transport trips by bicycle in 2025.

% Purpose of cycling



**Transport is a NET of 'cycling to or from work, school, shopping, to visit a café or restaurant, as part of a trip involving public transport, as part of work, escorting someone, running errands and to visit friends and family.'*

NET: Transport results capture those who ride for at least one transport purpose, and will add to less than the sum of the individual responses as this is a multiple response question.

Q18 / Q45. For what purposes did you ride over the last 7 days?
Base: All respondents who have rode a push-bicycle within the past year

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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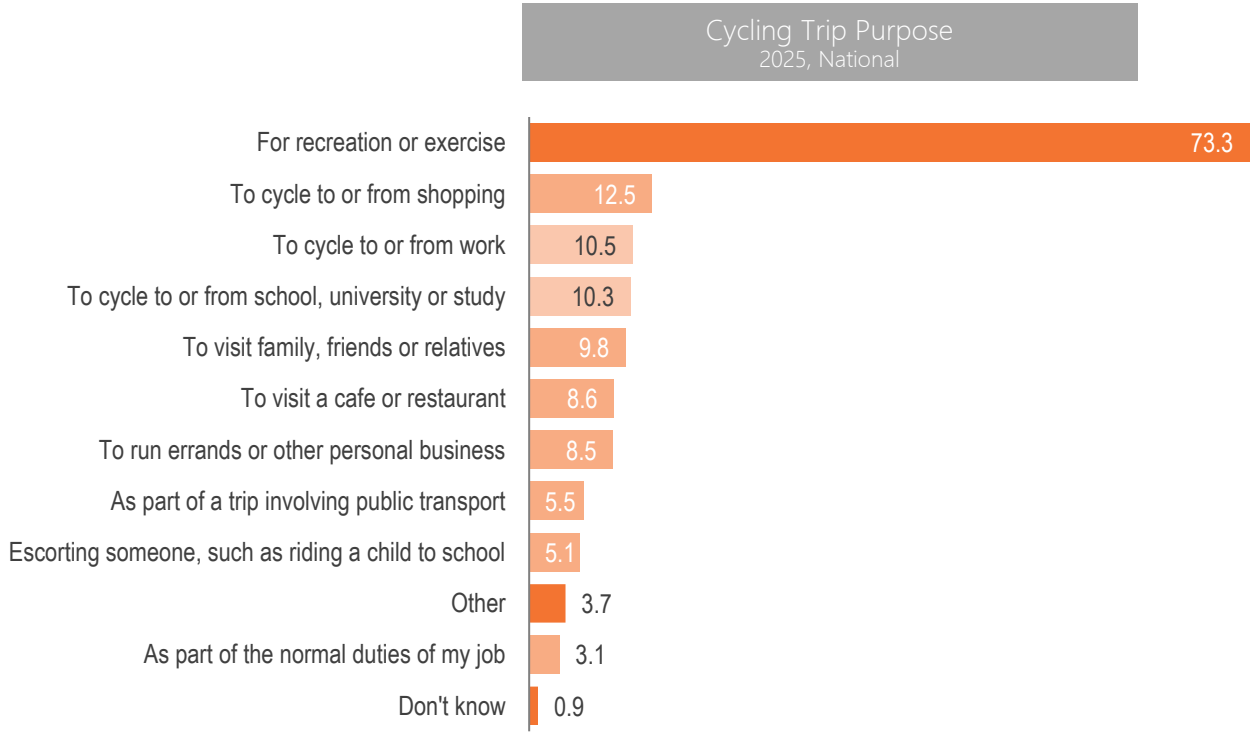
Recreation and exercise however is still the biggest reason for cycling despite the shift.



NET Transport: 43.1%

**Transport is a NET for all transport related trips (inclusive of commuting), excluding recreation, others, don't know, and is any trip that could otherwise have been made by a car*

NET Commuting: 20.0%

**Commuting is a NET for 'cycling to and from work, school, and university or study.*

"NET results capture those who ride for at least one transport (or commute) purpose and will add to less than the sum of the individual responses as this is a multiple response question.

Q18 / Q45. For what purposes did you ride over the last 7 days?
Base: All respondents who rode a push-bicycle within the past year, 2025 (n=3,588)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

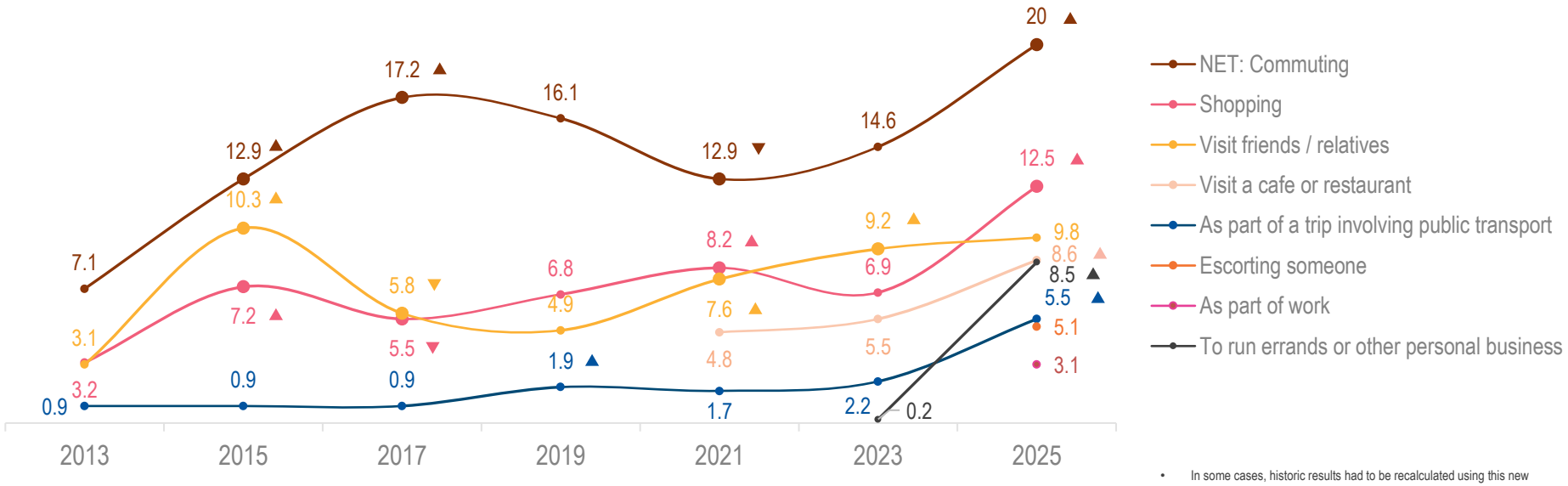
Within transport, commuting is the biggest reason why people cycle…

… with 20% saying commuting was their reason for cycling in the last 7 days, a significant increase from 2023. Shopping (12.5%) and visiting friends or relatives (9.8%) follow, while other trip purposes remain relatively low.

**Commuting is a NET for cycling to and from work and school.*

NET results capture those who ride for at least one commute purpose and will add to less than the sum of the individual responses as this is a multiple response question.

% Purpose of cycling



Q18 / Q45. For what purposes did you ride over the last 7 days?
Base: All respondents who rode a push-bicycle within the past year

- In some cases, historic results had to be recalculated using this new approach (pg. 12-13) to maintain comparability. This may mean minor differences in results from what was published in 2023, especially where past methods couldn't be fully replicated.
- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Recreation and exercise is also the biggest reason for cycling across all states.

Several nuances exists within each state.

For example, NT residents, while least likely compared to other states to cycle for recreation and exercise purposes, are more likely than residents in other states to cycle for practical reasons such as shopping, visiting others, running errands, and travelling for work.

By contrast, Tasmania shows the highest proportion cycling for recreation and the lowest levels of transport cycling.

Cycling Trip Purpose
2025, State

**Boxes in the chart highlights the state(s) with the highest proportion of respondents cycling for each purpose.*

	NSW	QLD	VIC	WA	ACT	SA	NT	TAS
For recreation or exercise	73.0	80.1	67.0	73.5	73.9	78.4	61.2	84.2
To cycle to or from shopping	13.2	10.5	14.7	11.6	11.2	9.1	19.1	3.2
To cycle to or from work	9.1	7.8	15.4	7.7	15.7	10.2	13.8	6.6
To cycle to or from school, university or study	13.0	5.8	12.0	10.1	9.8	5.8	12.2	5.2
To visit family, friends or relatives	11.0	6.8	11.1	8.8	11.9	8.9	14.3	5.6
To visit a cafe or restaurant	9.0	6.2	10.6	8.6	10.4	7.4	8.5	3.2
To run errands or other personal business	9.0	6.8	10.3	7.1	5.9	7.7	12.6	4.7
As part of a trip involving public transport	6.2	3.1	7.3	4.9	5.0	4.7	2.5	4.1
Escorting someone, such as riding a child to school	8.2	2.7	4.9	3.1	4.2	3.2	4.4	1.8
Other	2.1	4.7	5.5	2.7	2.7	3.4	3.0	5.0
As part of the normal duties of my job	4.2	1.9	2.7	2.8	3.9	2.9	7.3	2.1
Don't know	1.7	0.6	0.4	0.6	0.8	1.1	0.7	1.0

Q18 / Q45. For what purposes did you ride over the last 7 days?
Base: All respondents who rode within the past year, 2025 (n=3,588), NSW (n=532), QLD (n=694), VIC (n=295), WA (n=787), ACT (n=383), SA (n=252), NT (n=369), TAS (n=276).

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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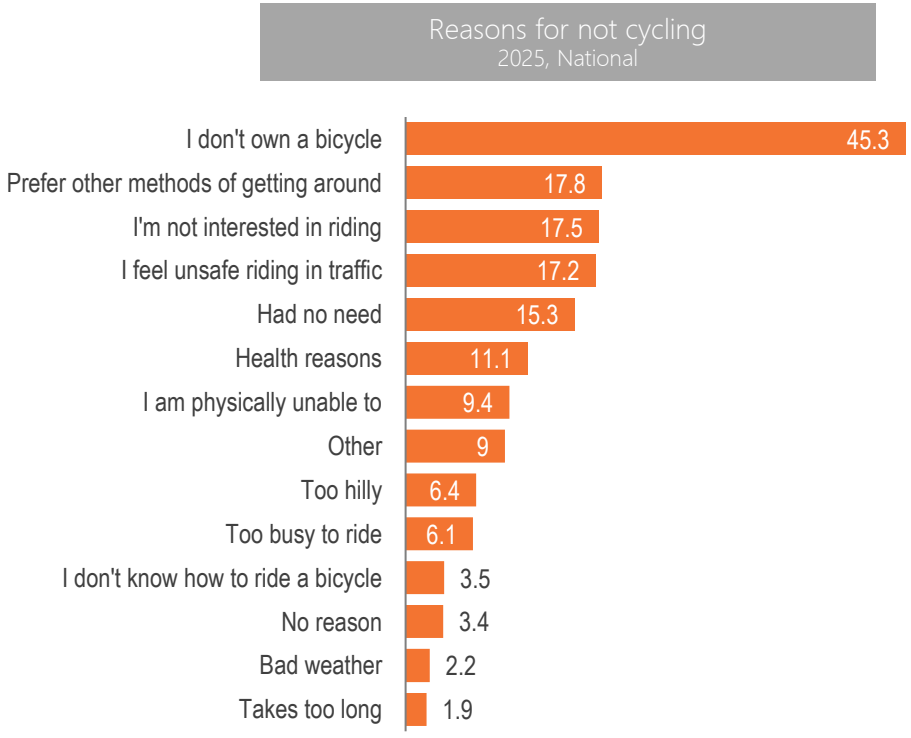
The biggest reason for those who do not cycle is because they don't own a bicycle.

Beyond bike ownership, key barriers include preferring other transport options (18%), lack of interest in cycling (17%), and feeling unsafe riding in traffic (17%).

These findings suggest opportunities to boost participation by improving access to bicycles, building safer infrastructure, and promoting cycling confidence.



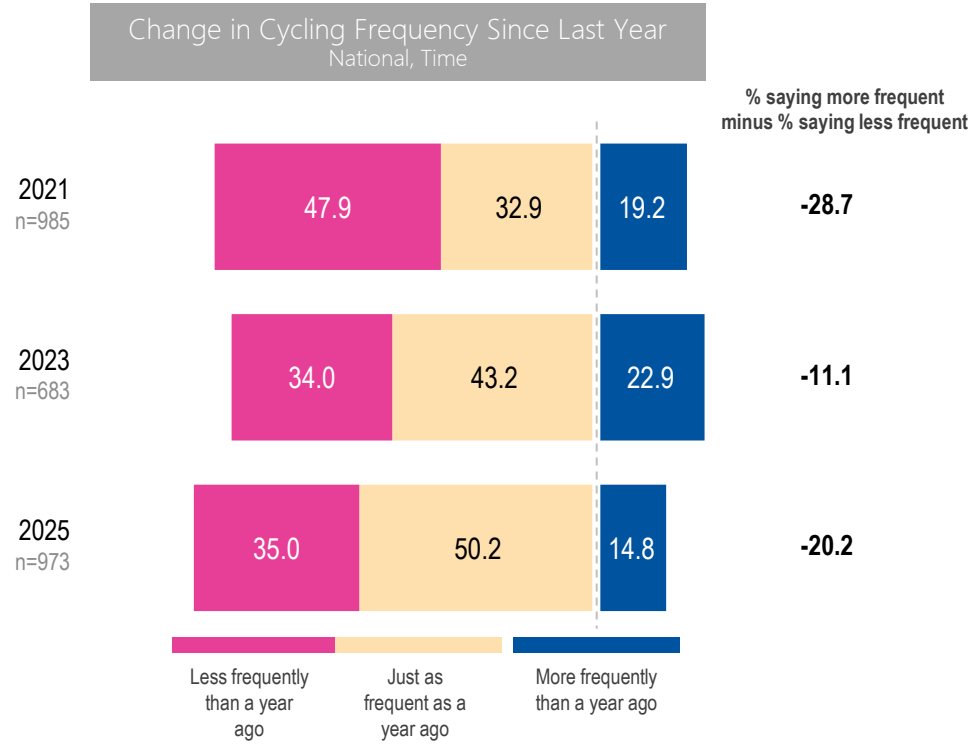
Q15. Are there any reasons you have not ridden a bicycle in the past year?
Base: Main respondents who have not ridden in the past year (n=3,140)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Fewer people are increasing their cycling frequency, but most are holding steady.

While fewer people are increasing their cycling frequency compared to previous years, this does not reflect a major drop in cycling. Instead, a growing majority now report cycling just as often as they did a year ago - up from 33% in 2021 to 50% in 2025.

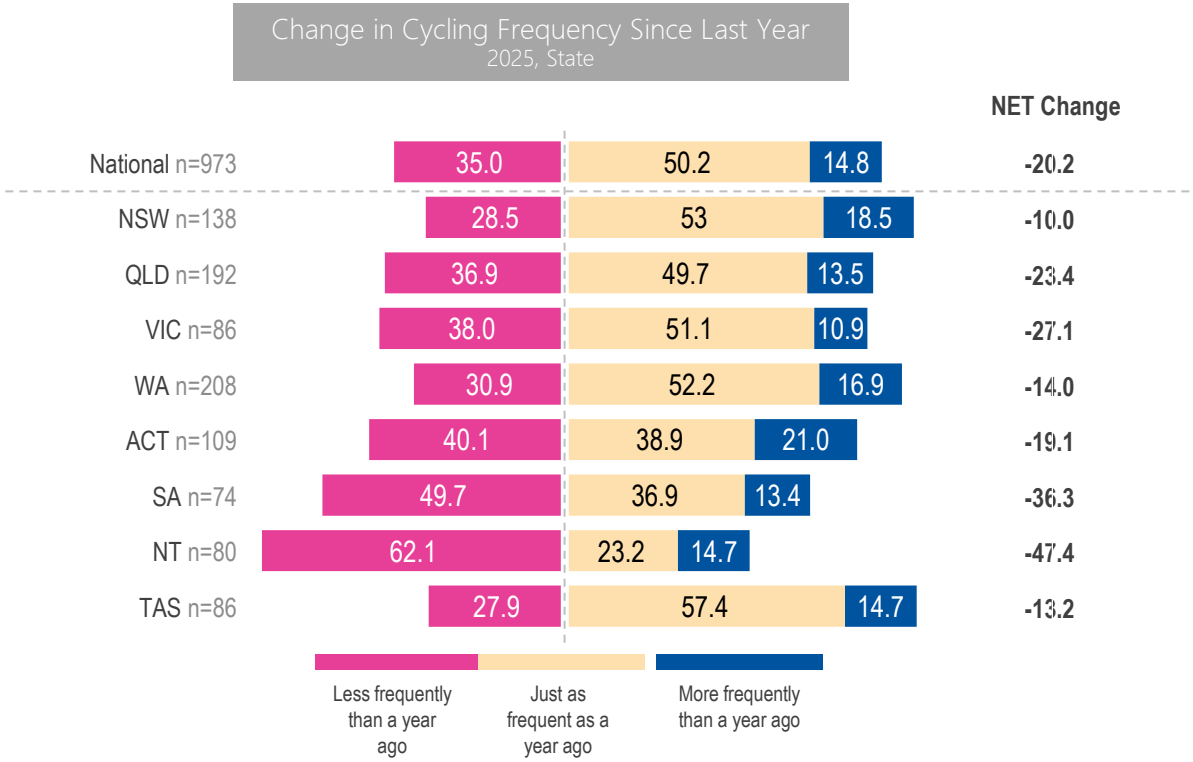
This suggests that cycling habits are stabilising among regular riders, pointing to a more settled and sustained level of engagement rather than ongoing growth or decline.



Q19a. And how would you describe your frequency of cycling?
Base: Main respondent who have been cycling for more than 12 months

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Cycling frequency is declining in every state, with the sharpest drops evident in NT and SA.

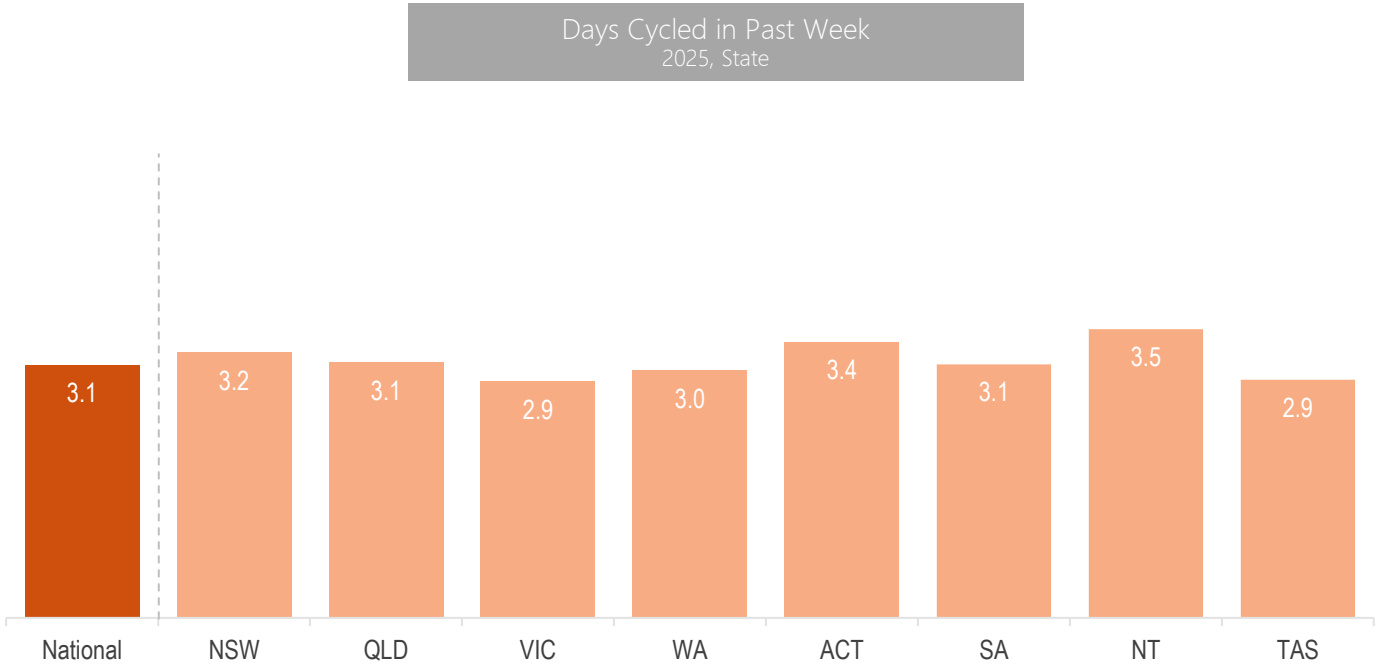


Q19a. And how would you describe your frequency of cycling?
Base: Main respondent who have been cycling for more than 12 months

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Australians who cycled in the past week rode on average 3.09 days.

This is higher amongst NT and ACT residents, and lowest amongst VIC and TAS residents.



Q16 / Q42. In the last 7 days, on how many days did you ride a bicycle?
Base: All respondents who have used a bicycle in the last 7 days (n=1,808)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

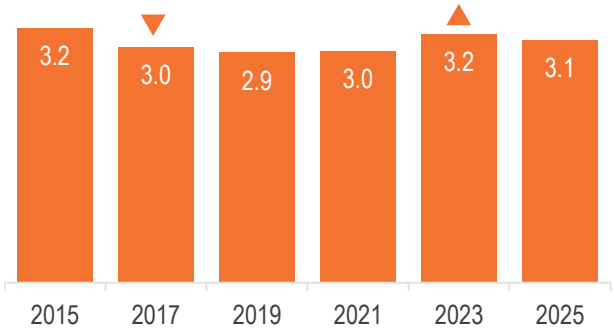
Cycling frequency (past 7 days) has remained relatively flat over the last decade.

Despite a modest decline from 2015 (3.24 days) to 2019 (2.93 days), the number of days Australians cycle each week has hovered consistently around 3 days.

Notably, there was no marked spike during the pandemic years, unlike other measures such as participation rates, suggesting that while more people may have taken up cycling during COVID, they didn't necessarily ride more often.

The brief uplift to 3.17 days in 2023 appears to have been short-lived, with 2025 figures (3.09 days) suggesting a return to the long-term average.

Average Days Cycled in Past Week
National, Time



Q16 / Q42. In the last 7 days, on how many days did you ride a bicycle?
Base: All respondents who have used a bicycle in the last 7 days, 2021 (n=2,158), 2023 (n=1,281), 2025 (n=1,808)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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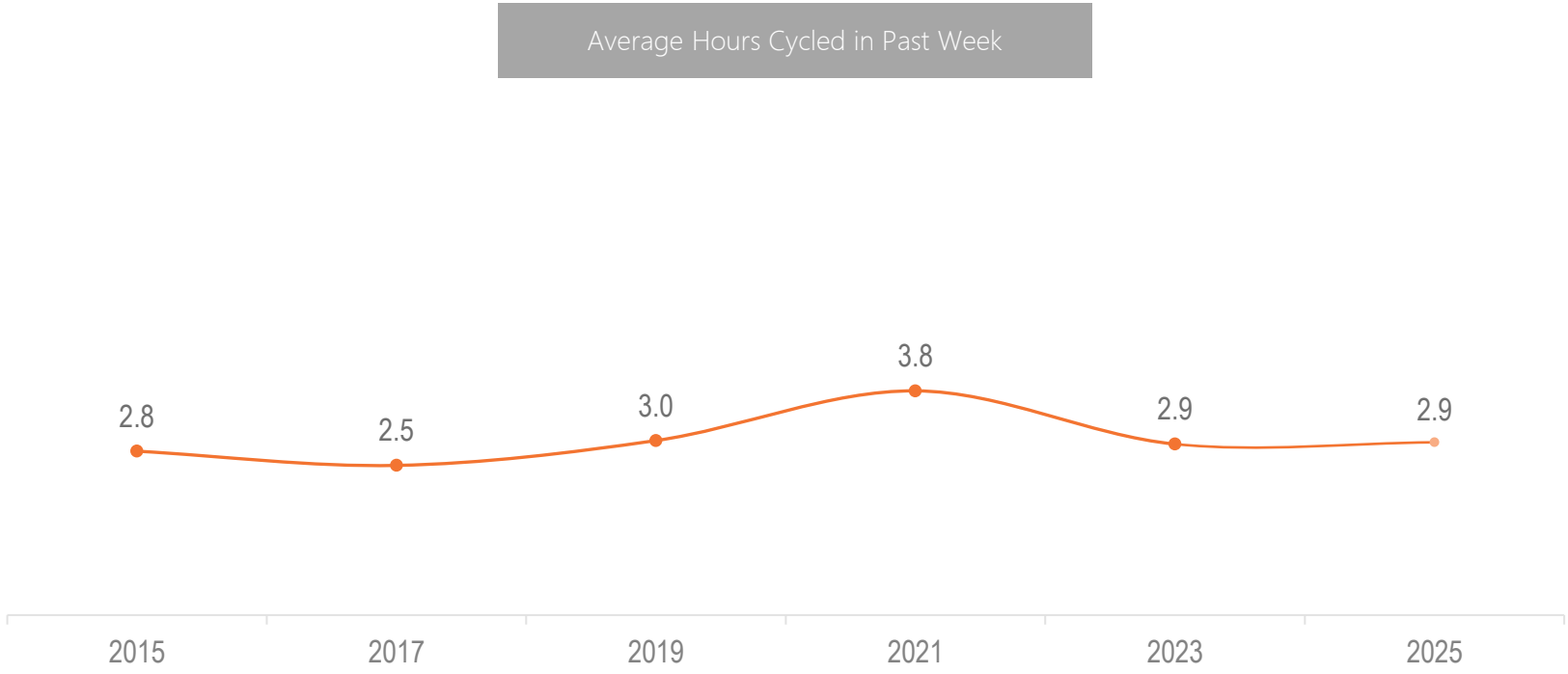
Cycling time has stabilised post-COVID at just under 3 hours per week.

After peaking at 3.79 hours during COVID in 2021, average weekly cycling duration has returned to a more stable level, with riders clocking 2.92 hours in 2025. This is in line with 2023 (2.89 hours) and reflects a likely return to long-term norms.

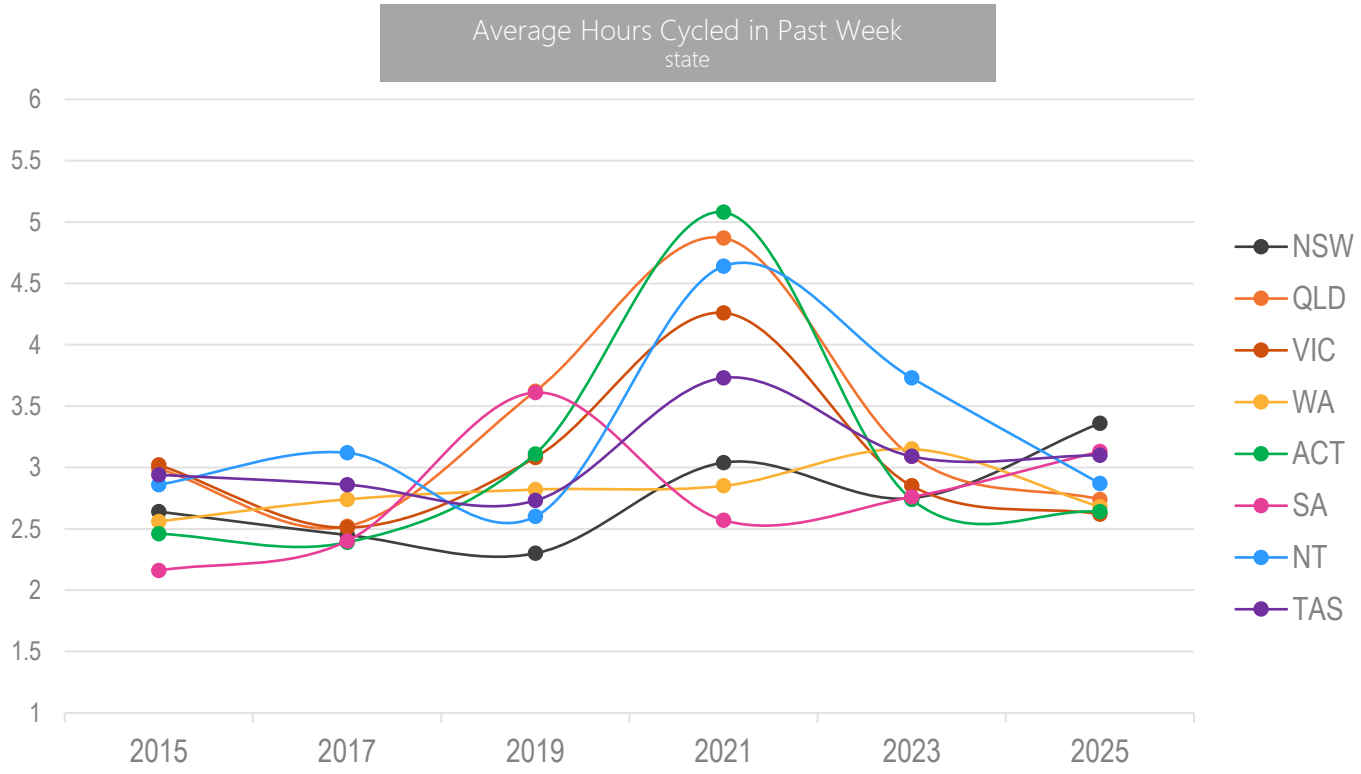


Q17 / Q43. What is your best estimate of the total time you have spent riding over the last 7 days?
Base: All respondents who have used a bicycle in the last 7 days

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

COVID drove a temporary surge in cycling time, with most states now returning to pre-pandemic norms.

Cycling time peaked in 2021 across most states, likely driven by COVID restrictions and lifestyle changes. SA peaked slightly earlier in 2019, while WA showed minimal fluctuation. Between 2023 and 2025, NT saw the largest decline (-0.68 hours), while NSW recorded the biggest increase (+0.7 hours), highlighting ongoing variability at the state level.



Q17 / Q43. What is your best estimate of the total time you have spent riding over the last 7 days?
Base: All respondents who have used a bicycle in the last 7 days

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Better paths and more time are the key motivators for riding more.

The top 5 overall themes from the motivations to cycle more question are:

- **Better infrastructure** – 42% cited better paths, facilities, and on-road safety features
- **Time availability** – 39% said simply having more time would encourage them to cycle more
- **General motivation / mindset** – 34% mentioned motivation without needing further details
- **Secure bike storage** – 31% wanted somewhere safe to park or store their bike
- **Accessibility and inclusivity** – 27% wanted more accessible paths for all ages and abilities, and 27% wanted a bike that suits their needs.

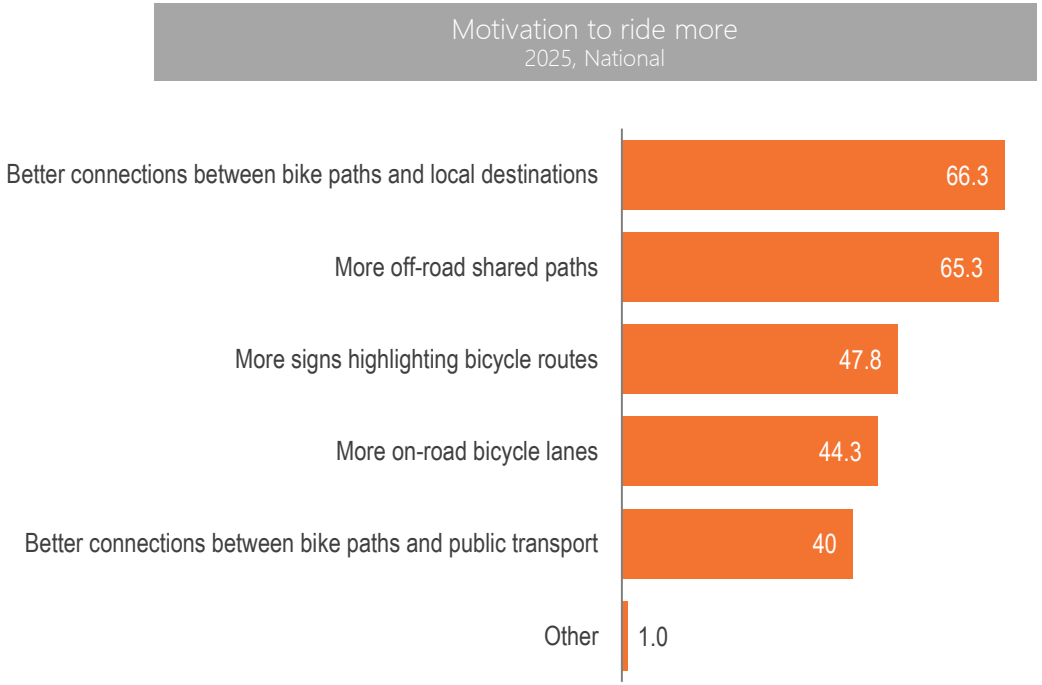
These reflect a mix of practical barriers (infrastructure, time, storage) and personal or psychological enablers (motivation, confidence, accessibility).

Q13b. Thinking about riding your bike, what might help you do it more?
Base: Main respondent who rode within the past year (n=890)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Cyclists want better connections, more off-road paths, and clearer bike route visibility.

Nearly two-thirds of cyclists say that better local path connections and more off-road shared paths would motivate them to ride more. Clearer signage and more on-road or intermodal connections are also valued.



Q13c. You mentioned that better paths, facilities, and on-road safety features would make you more likely to ride your bike. What specifically do you think would make you more likely to ride your bike more?

Base: Main respondents who mare more likely to ride if there were better paths, facilities, and on-road safety features (n=377)

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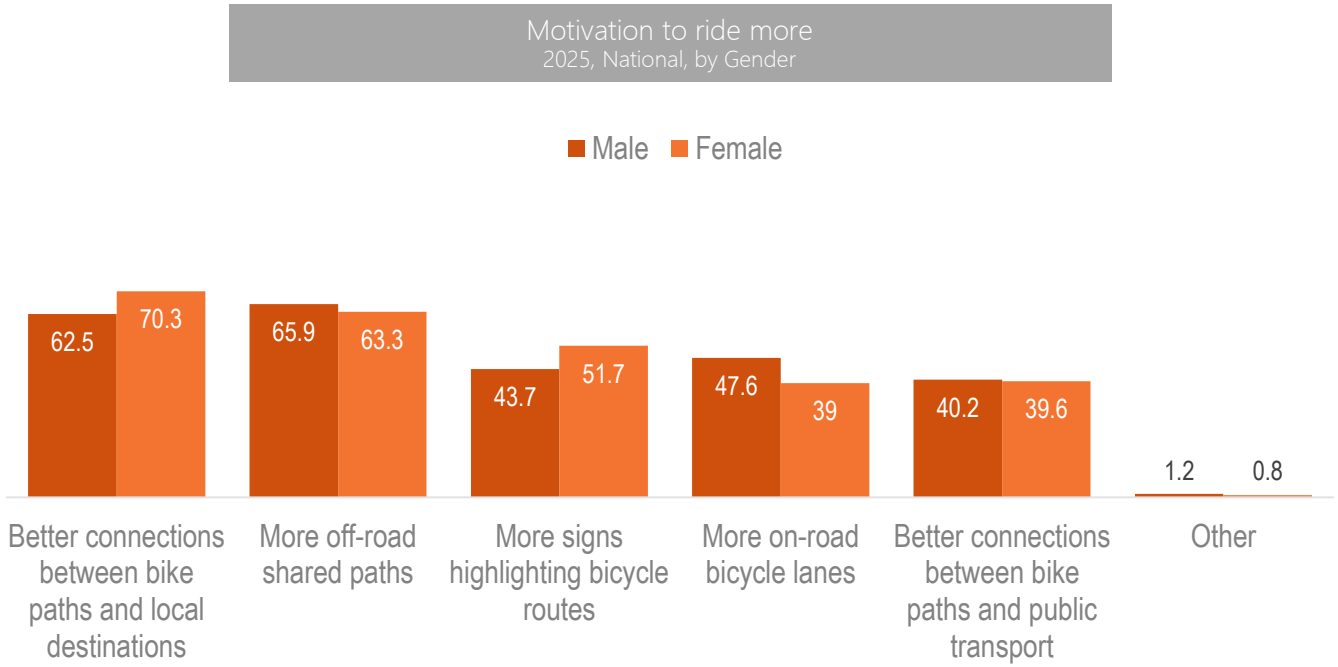
Motivation to ride more
by gender



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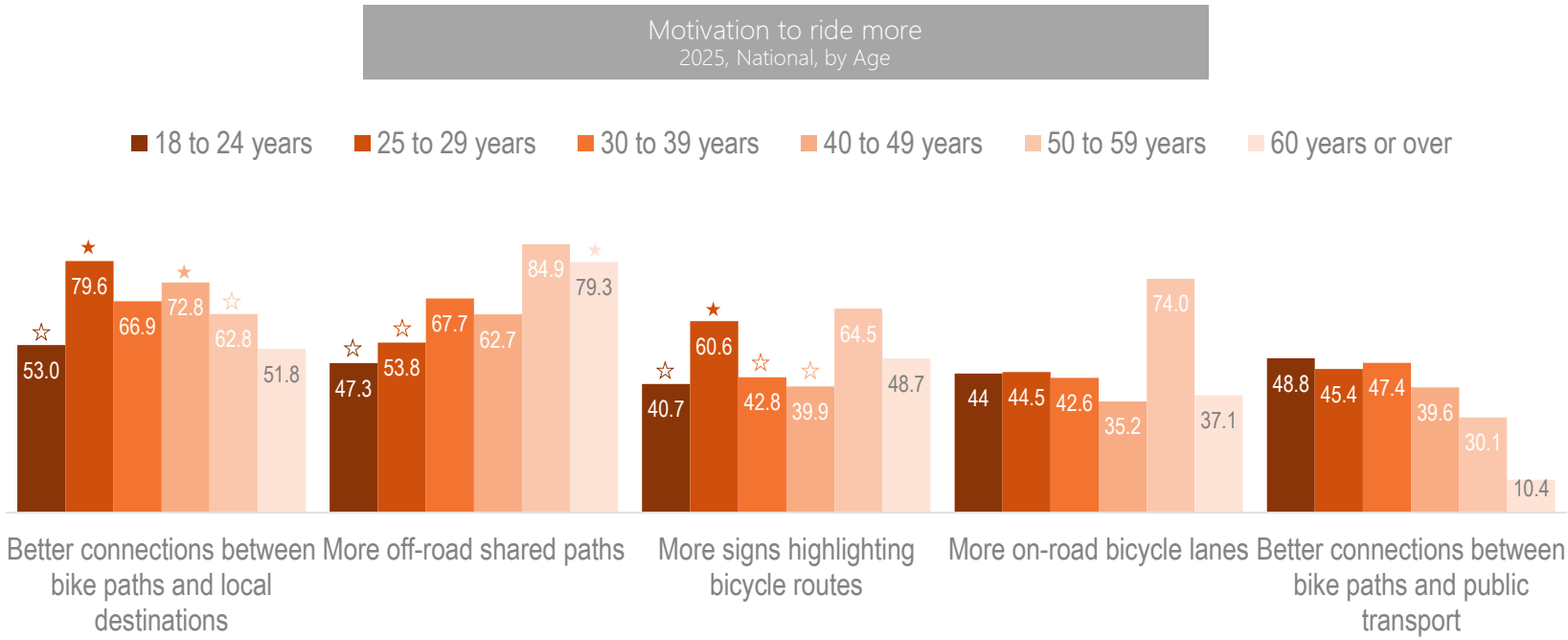
Motivation to ride more
by age



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CWANZ
CYCLING AND WALKING
AUSTRALIA AND NEW ZEALAND

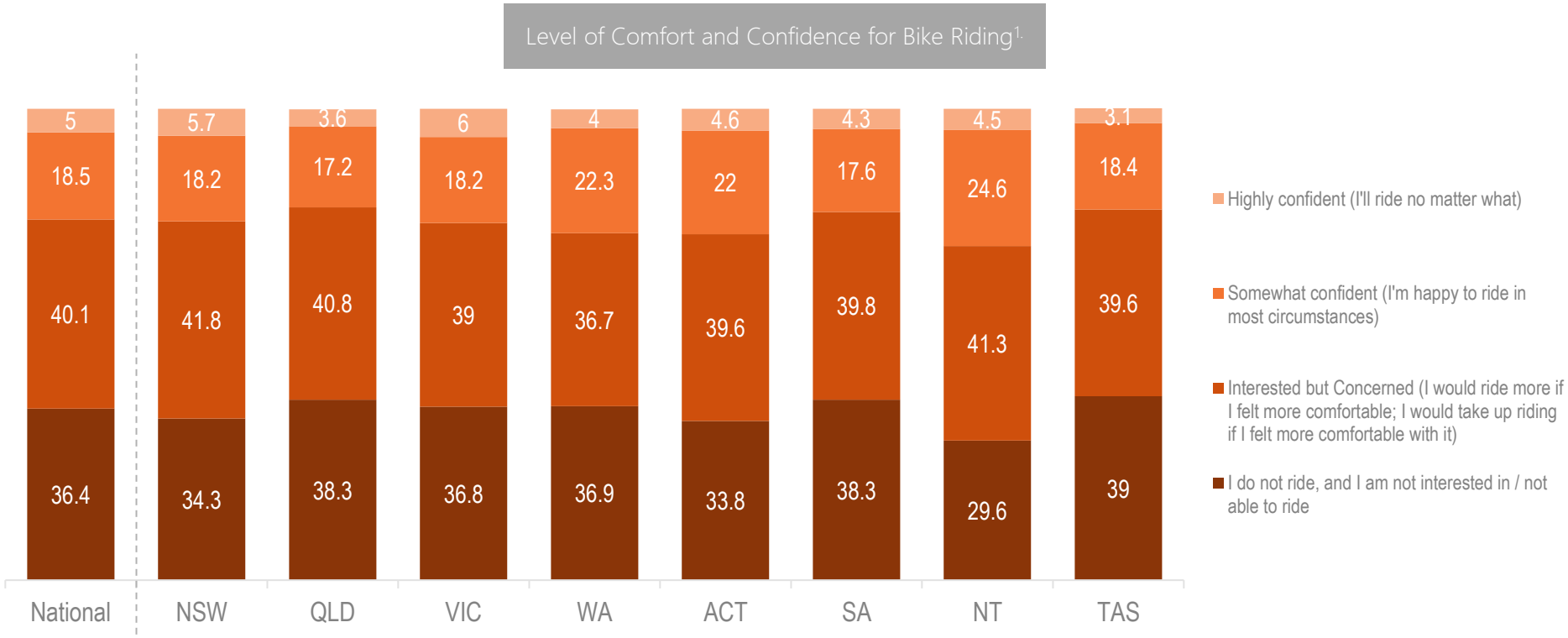
Cycling – Profile and Ownership

2 in 5 of Australians would also ride more or take up riding if they felt more comfortable or confident.

Targeting this 40.1% by creating better paths, which is the top motivator for riding more, would contribute to increasing confidence and potentially see ride frequency lifting up as well.

Around one-third of Australians do not ride and are not interested or able to do so, while about 1 in 4 are happy to ride in most conditions, suggesting a strong base, but room for growth through improved safety, accessibility, and infrastructure.

A more granular breakdown of this chart is included in the appendix.



1. Adapted from the Four Types of Cyclist segmentation question (Dill, J., & McNeil, N. (2016). Revisiting the four types of cyclists: findings from a national survey. Transportation research record, 2587(1), 90-99. https://doi.org/10.3141/2587-11).

Q51. What phrase describes your attitude towards bicycle cycling?
Base: All main respondent (n=4,796)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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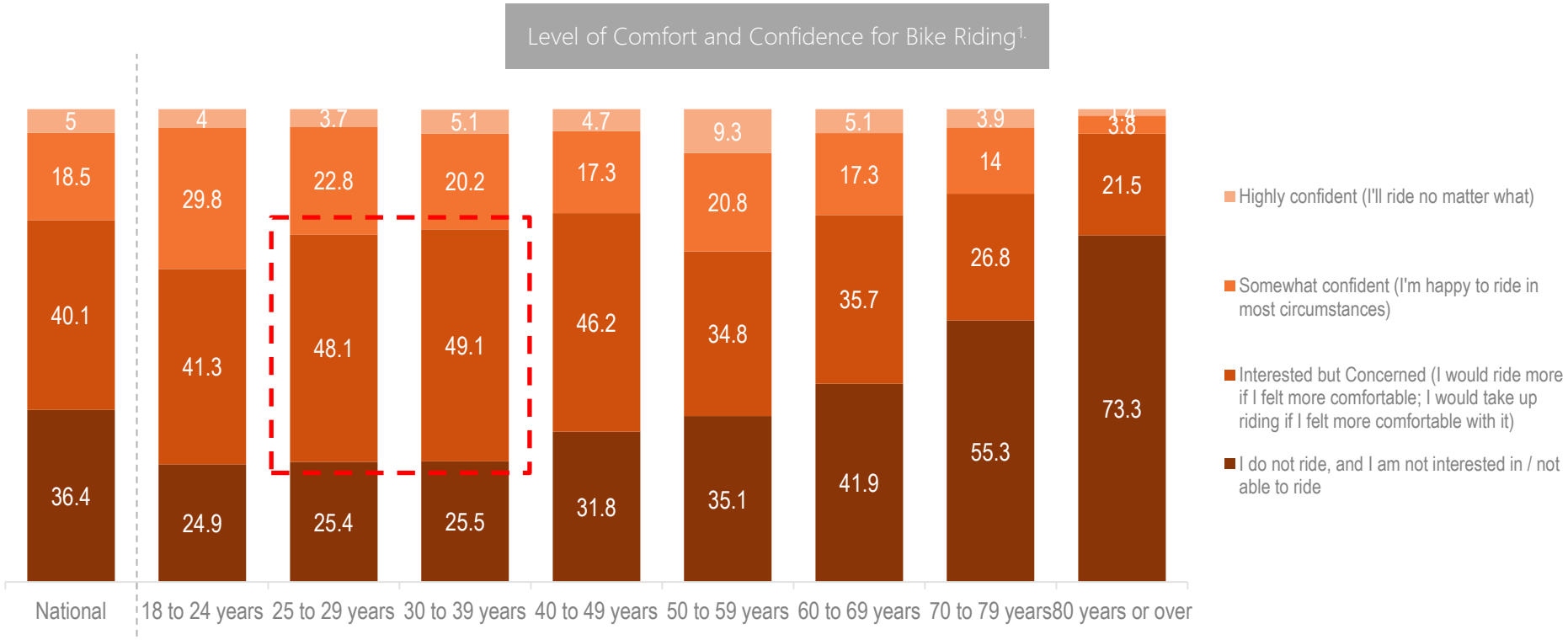
Close to half of those age 25-39 fall into the target market.

A more granular breakdown of this chart is included in the appendix.



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Base: All main respondent (n=4,796)

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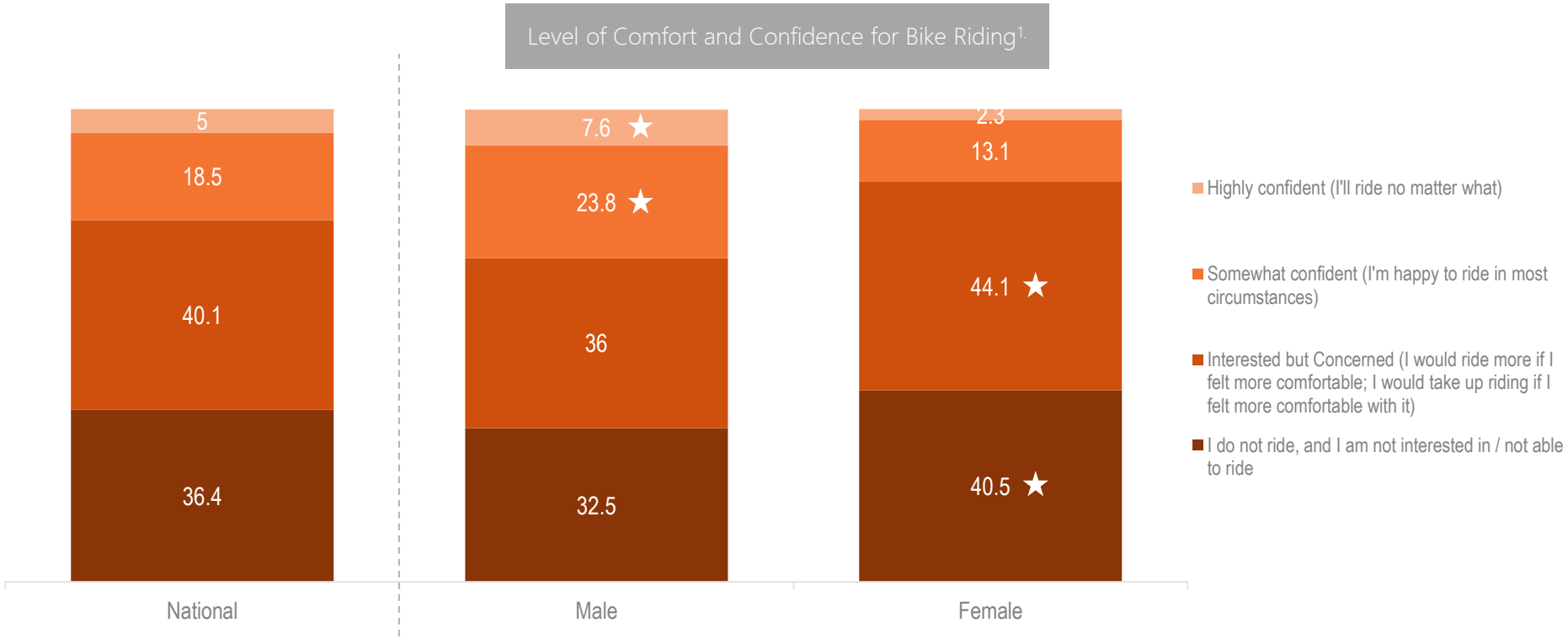
Females are significantly more likely to be within the target market compared to males.

A more granular breakdown of this chart is included in the appendix.



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Base: All main respondent (n=4,796)

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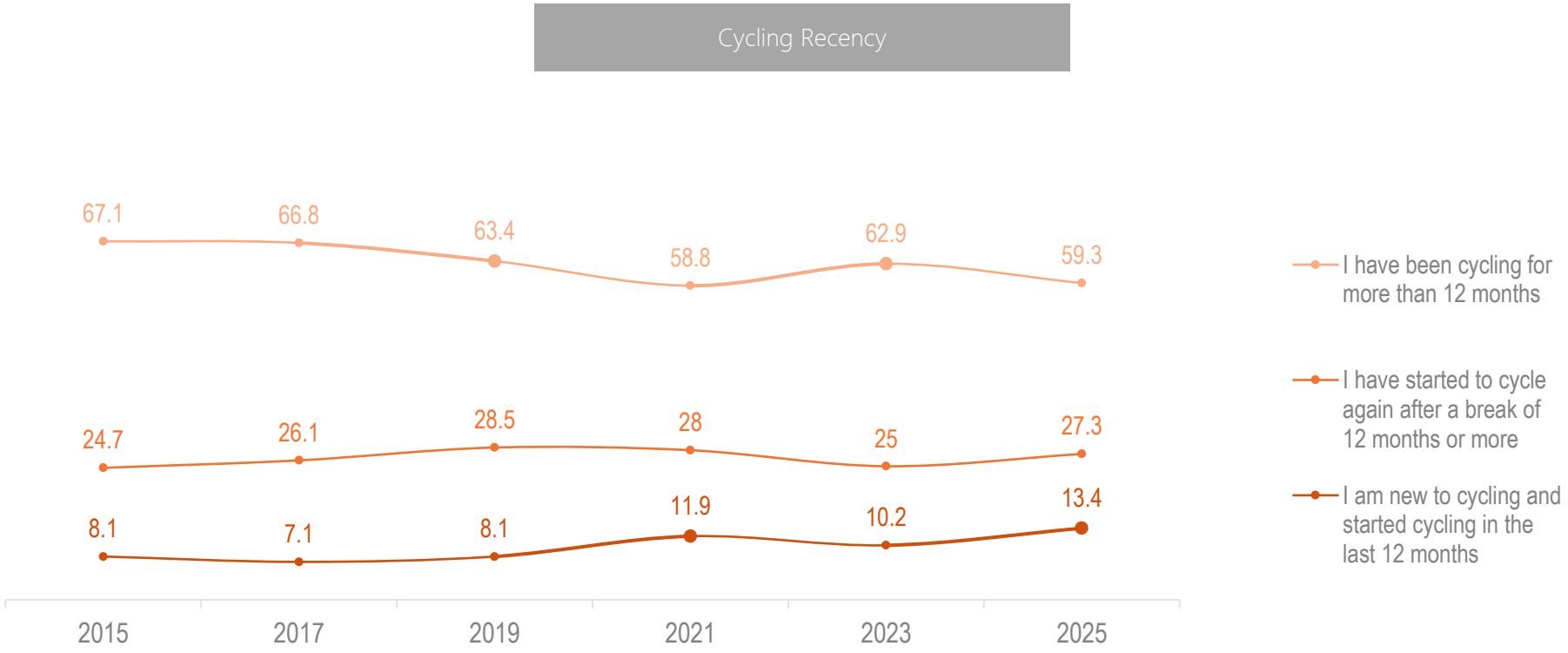
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Cycling experience levels have remained stable, with a small rise in new riders evident.

In 2025, the share of new cyclists (those who started in the past 12 months) increased to 13%, the highest ever recorded. Meanwhile, long-term cyclists dipped slightly to 59%, continuing a trend of gradual decline since 2015.



Q19. Which of the following statements best describes you?

Base: Main respondents who rode a bicycle within the past year? Base: 2015 (n=1739_, 2017 (n=1036), 2019 (n=1249), 2021 (n=1576), 2023 (n=1075), 2025 (n=1656)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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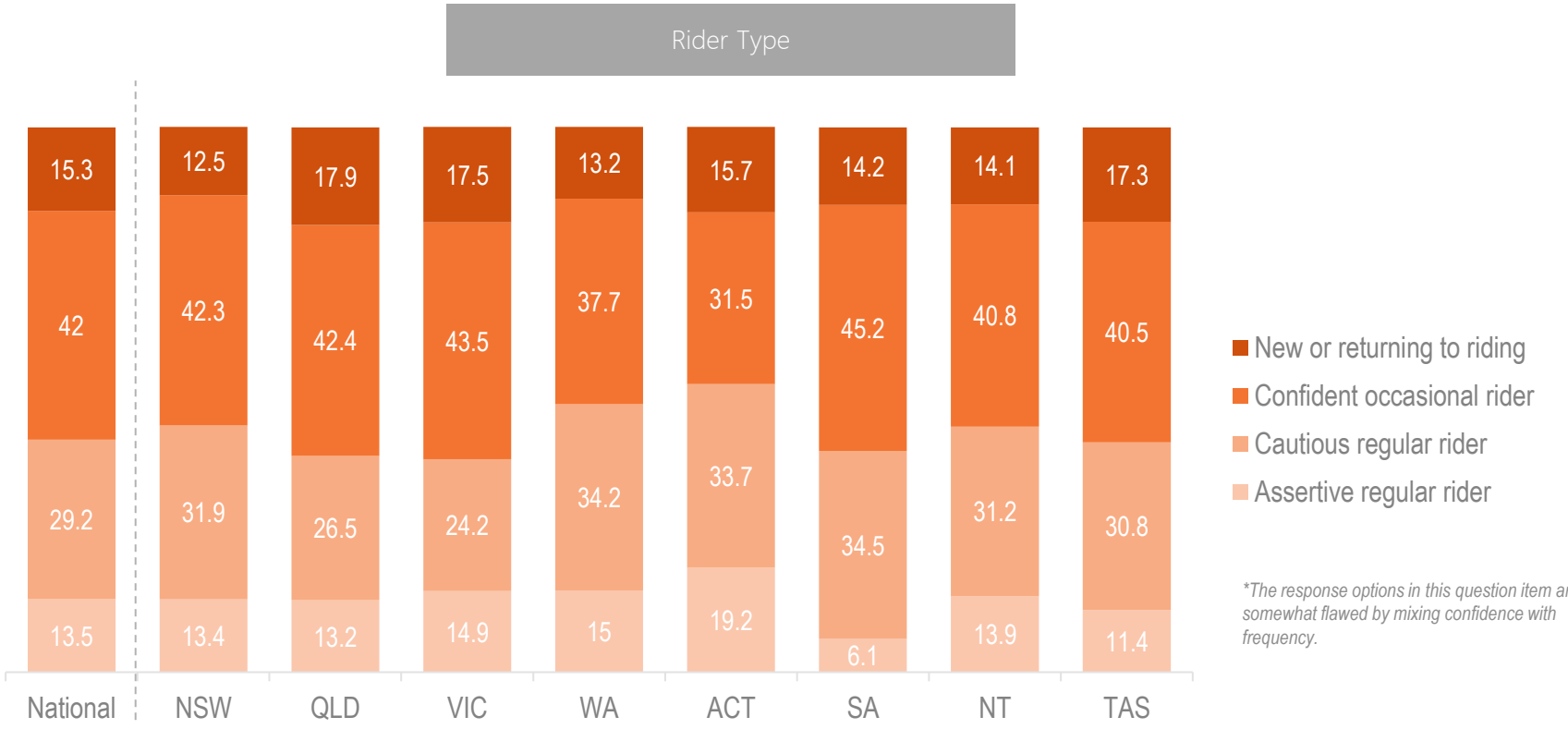
The majority of cyclists ride casually or cautiously, with fewer riding assertively.

Together, confident occasional and cautious regular riders account for 71% of cyclists nationally. Across states, these two groups make up the majority of riders, ranging from 65% in the ACT to 80% in SA.



**The response options in this question item are somewhat flawed by mixing confidence with frequency.*

Q22. Which of the following phrases best describes you as a bike rider?
Base: Main respondent who has ridden a bike in the last year (n=1656)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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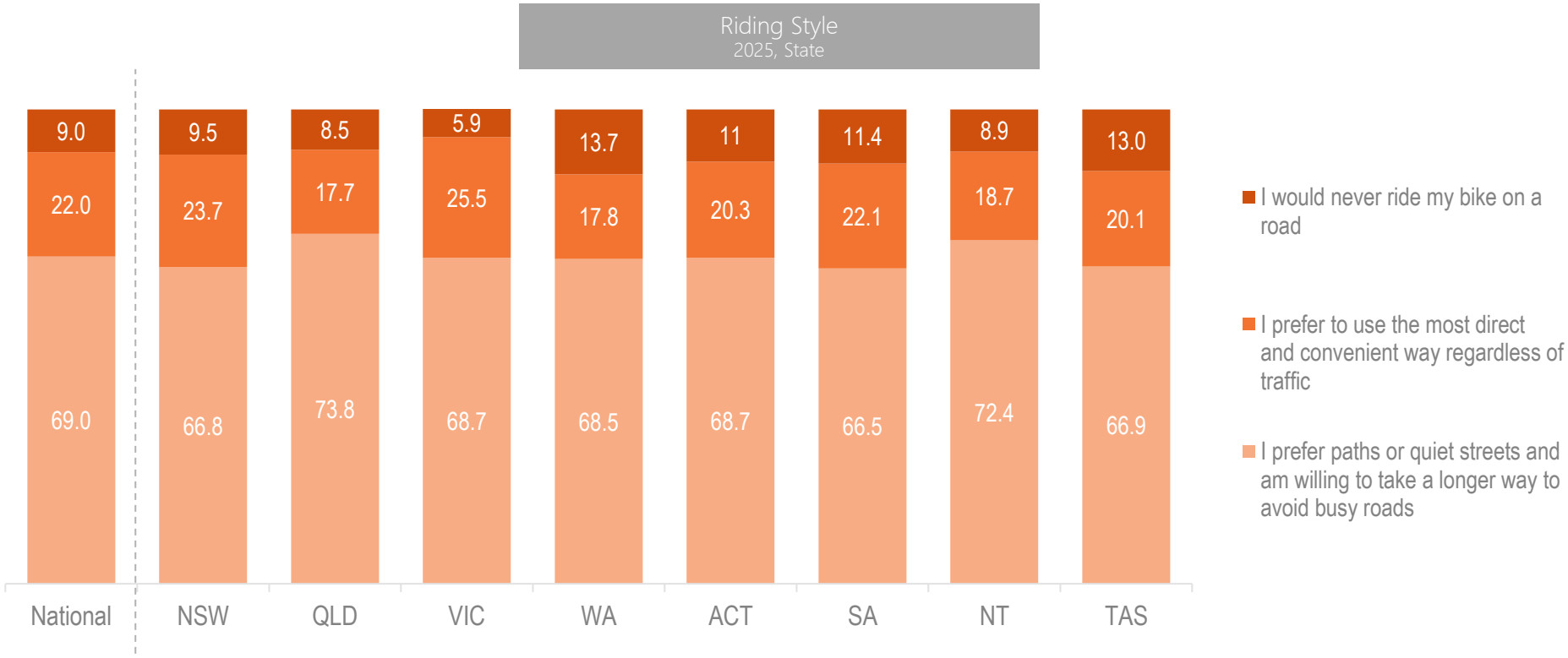
Riding confidence varies, but most prefer quiet routes over direct ones.

Nearly 7 in 10 cyclists say they prefer quieter routes or paths, even if it means taking a longer way. This cautious riding style is consistent across states, though cyclists in VIC, NSW and SA are slightly more likely to prioritise direct convenience over avoiding traffic.



Q21. Which of the following best describes your riding style?
Base: Main respondent who rode a bike in the last year (n=1,656)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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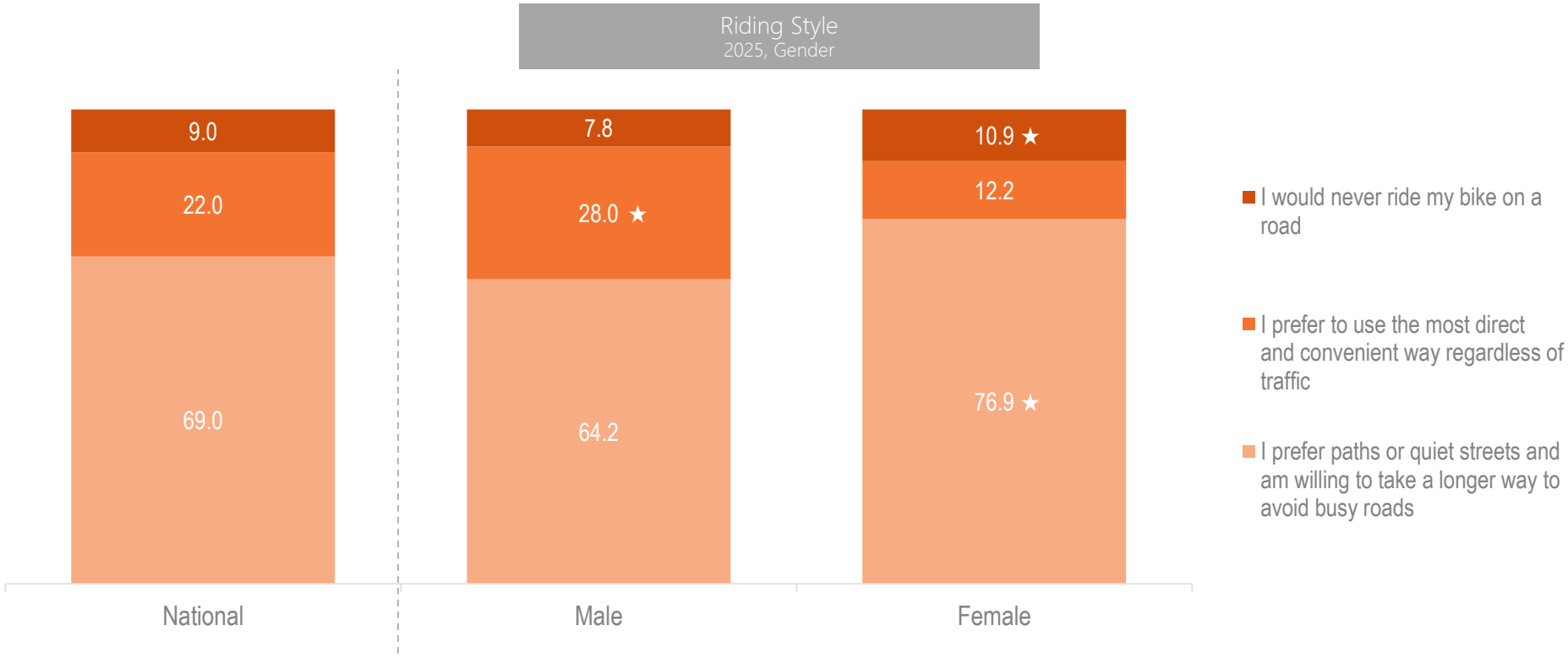
Riding Style
by gender



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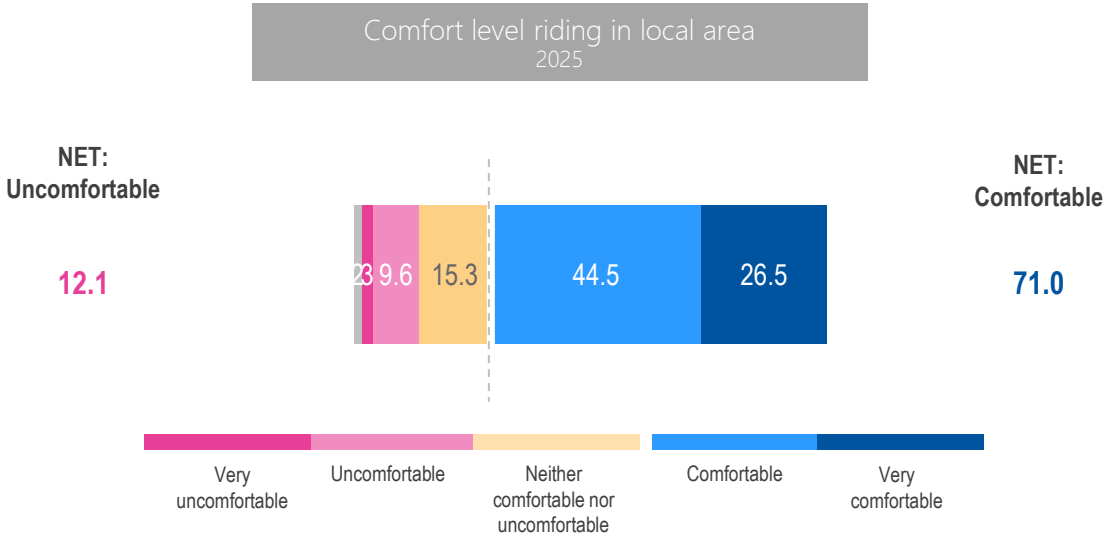
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Most cyclists feel comfortable riding locally, despite many being new or occasional riders.

This suggests local environments may already support safe, low-stress cycling for many users, especially important as transport-based cycling increases.

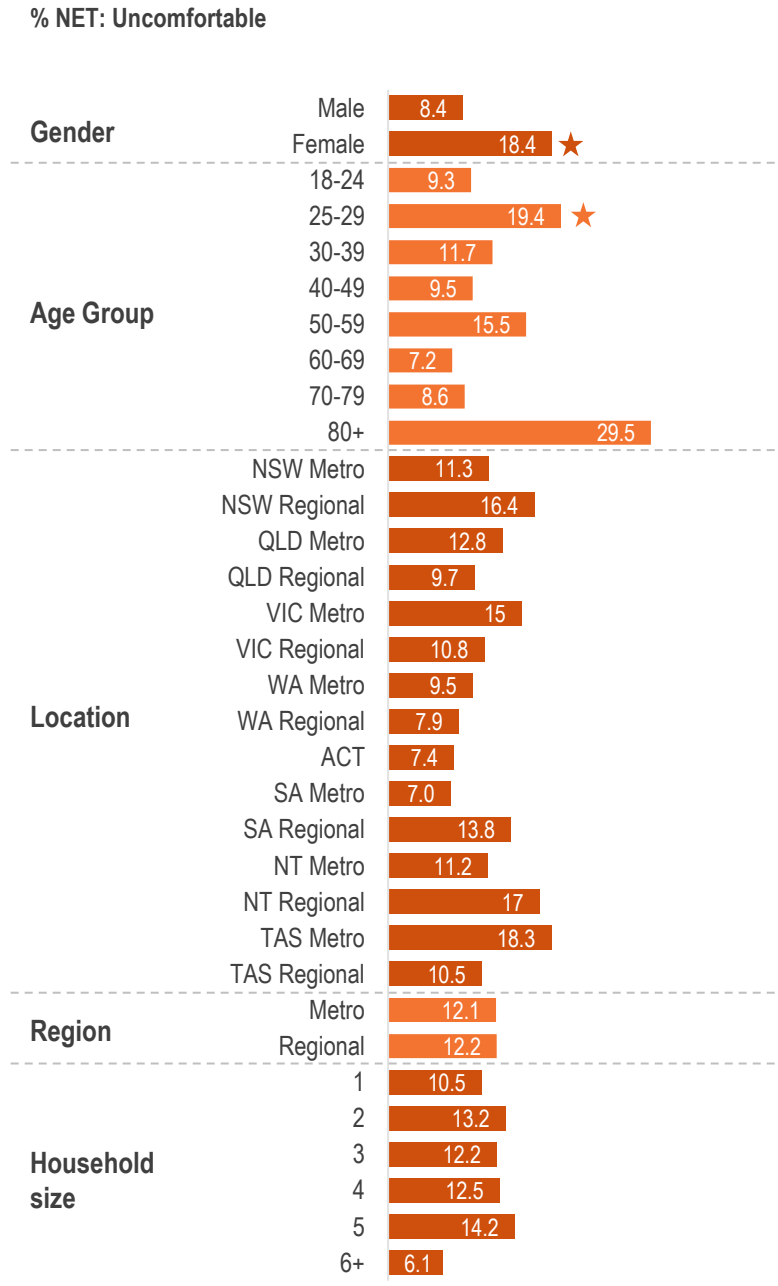


Q53. How comfortable are you when walking, riding your bike, or using your wheelchair or mobility scooter in your local area?
Base: Main respondents who rode in the last year (n=1,656)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Females, as well as those age 25-29 are more likely to feel uncomfortable riding in their area.

For both groups, nearly 1 in 5 feel uncomfortable riding in their local area, highlighting a key barrier to broader participation. These findings suggest infrastructure and communication strategies should specifically consider the needs of younger adults and women - two groups more likely to feel less confident on a bike.



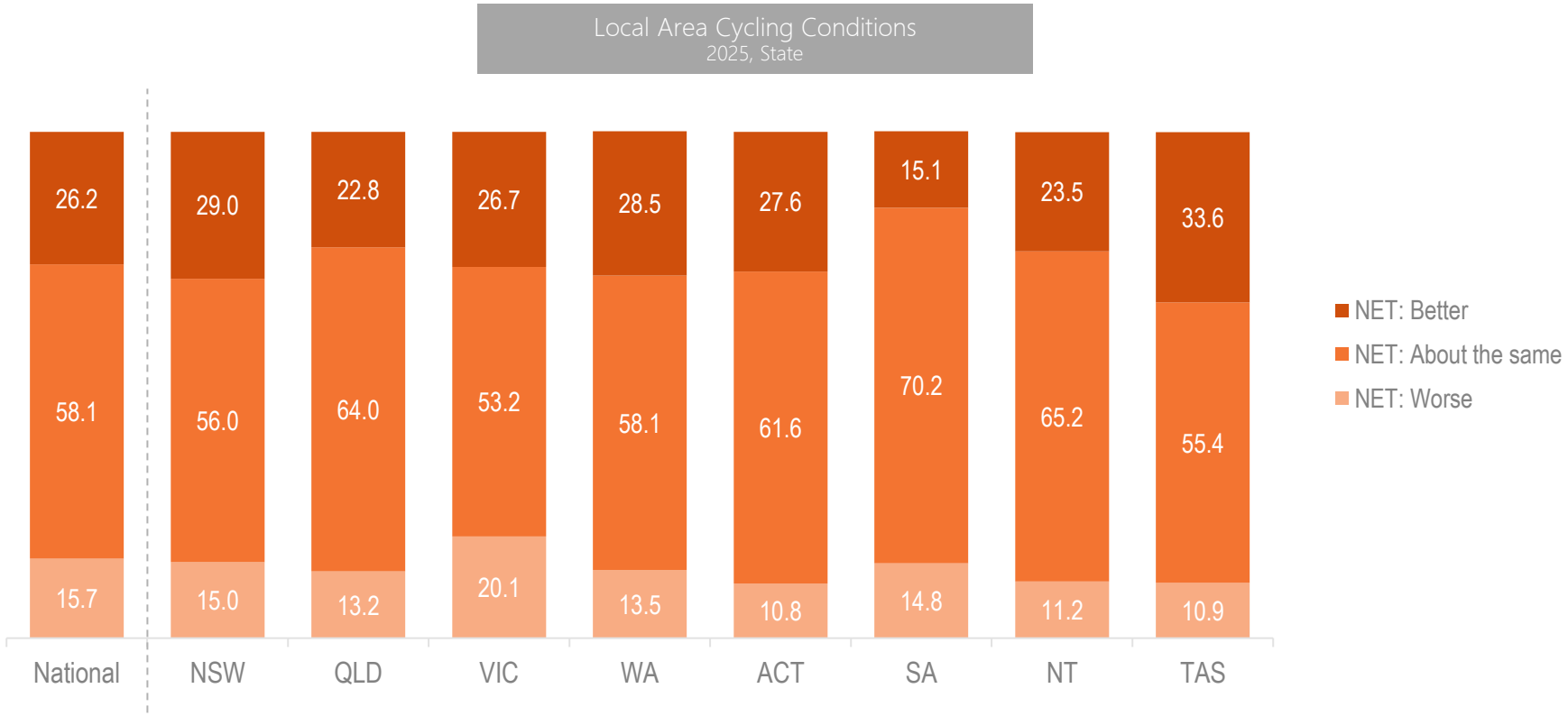
**Base sizes for those age 80+ is small (n=18). Please interpret this result with caution.*

Q53. How comfortable are you when walking, riding your bike, or using your wheelchair or mobility scooter in your local area?
Base: Main respondents who rode in the last year (n=1,656)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Cycling conditions seen as stable overall, with some signs of improvement.

Most riders (58%) feel local cycling conditions are about the same as last year. However, across most states, more people report improvements than declines, suggesting gradual positive change. SA stands out with 70% saying things have stayed the same.



Q24. In the past year, do you think that cycling conditions in your local area have become better or worse?
Base: Main respondents who rode in the last year (n=1,656)

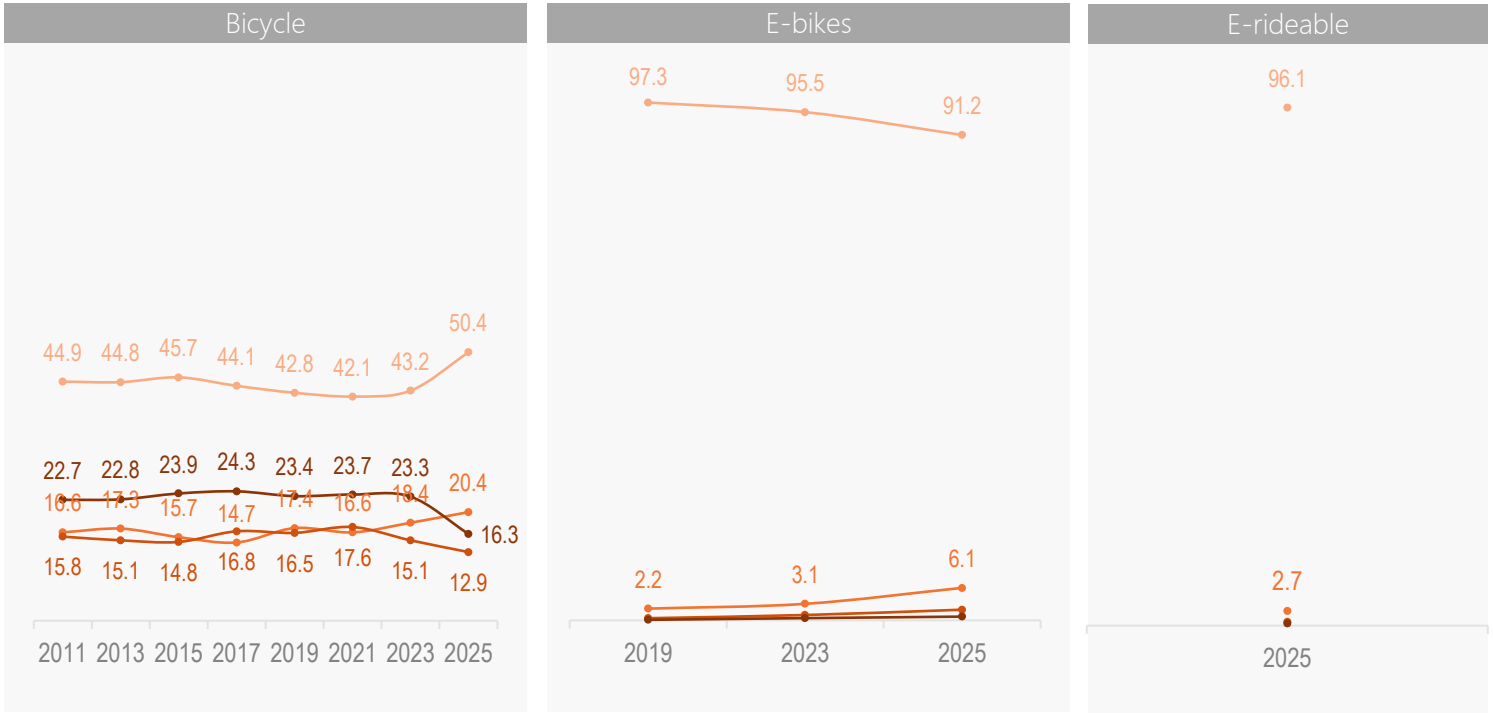
- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Household Bicycle Ownership

In 2025, half of Australian households report owning no traditional bicycle, the highest level recorded. Among those that do, one-bike households have become more common, while multi-bike ownership has declined, indicating a shift toward more selective or practical ownership.

In addition to rising e-bike uptake (6%) and emerging e-rideables (3%), broader contextual factors may also influence declining ownership. These include growth in apartment living in high-density areas, which limits secure storage, as well as the expanding availability of shared bikes, e-scooters, and subscription-based bike services in the more populated states. These alternatives may reduce the need to own a traditional bicycle while still supporting regular cycling behaviour.

Future surveys would be assisted by distinguishing between ownership types - personally owned, shared / public and subscription-based.



Traditional push bicycle ownership has dropped overall since 2019 (7.6%), whereas e-bike ownership has increased on a similar scale (6.1%).

The total bicycle ownership for 2025 is at 53.1%. Total bicycle ownership is the proportion of Australian residents that own at least 1 traditional bicycle, e-bike, or e-rideable.

Q46. How many bicycles, e-bikes and e-rideables in working order are in your household?

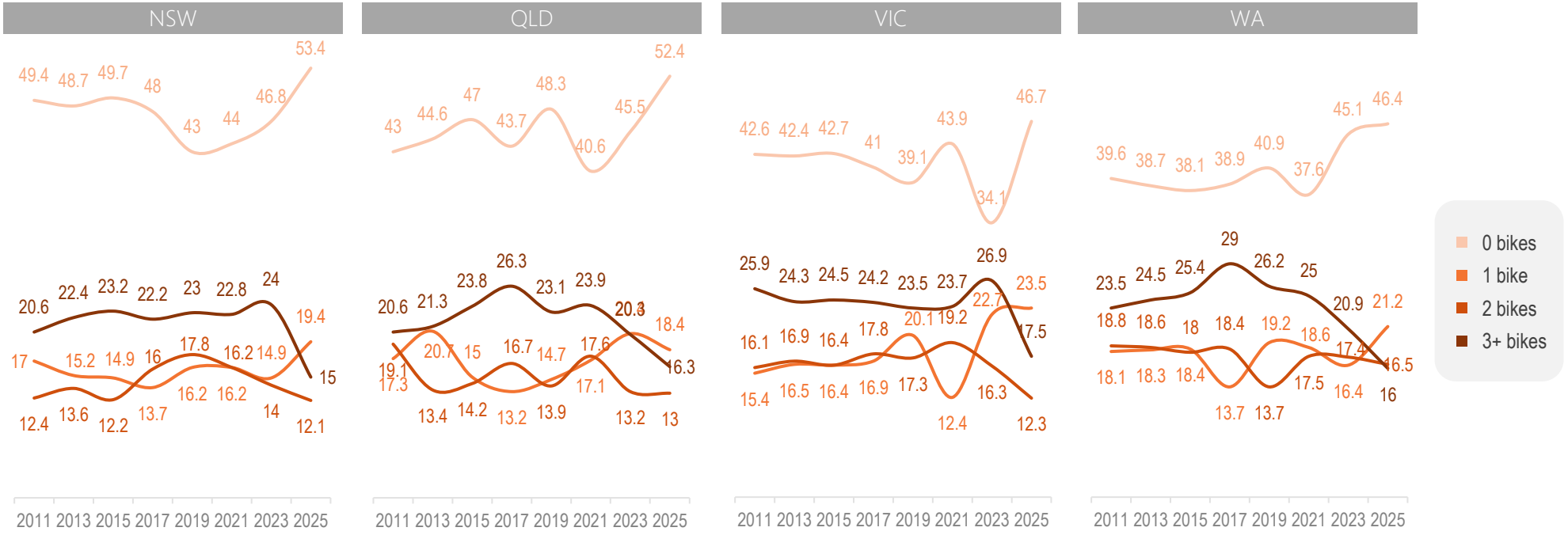
Base: All main respondents; 2011 (n=9,189), 203 (n=10,039), 2015 (n=8,370), 2017 (n=4,431), 2019 (n=5,100), 2021 (n=4,473), 2023 (n=3,659), 2025 (n=4,796)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Regular Bicycle Ownership by State

The shift away from multi-bike households is evident across all four states shown. Ownership of 2 or more bicycles has declined, while households owning just one bike have generally increased, particularly in NSW, QLD, and VIC.

At the same time, bicycle non-ownership has reached its highest levels, with over half of households in NSW (53%) and QLD (52%) now reporting no bikes. This pattern reflects a broader national shift: fewer households are owning bikes, and among those who do, owning just one bike is becoming the norm.



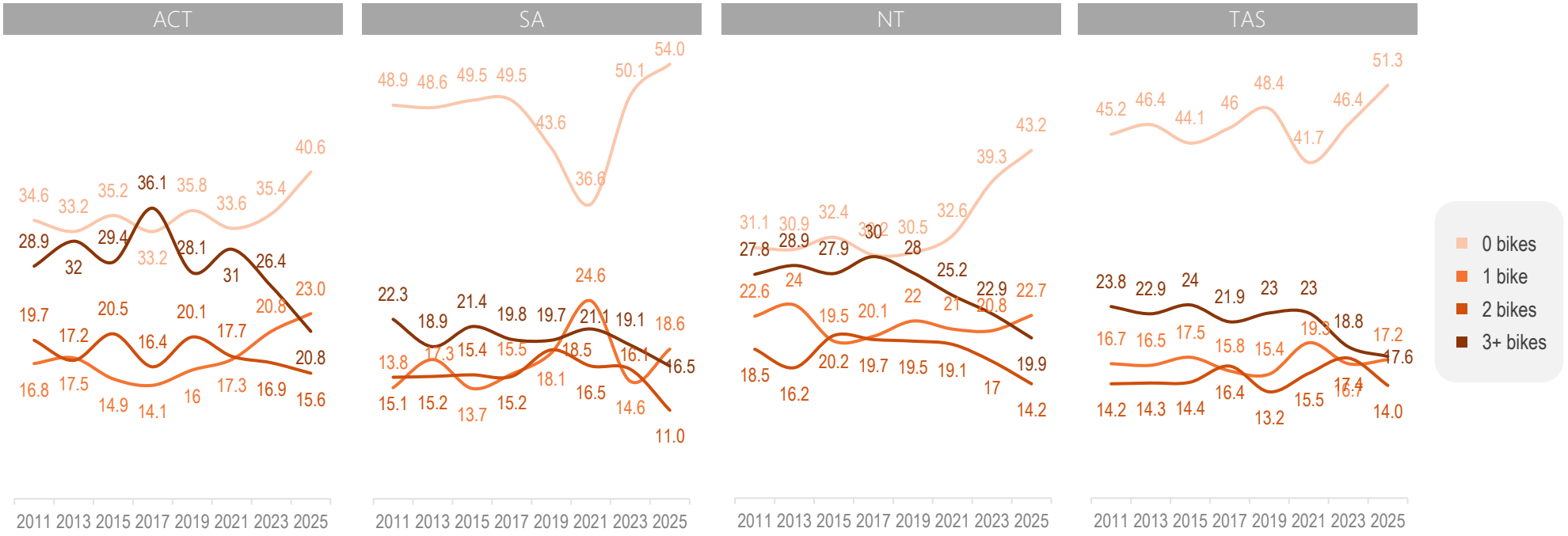
Q46. How many bicycles, e-bikes and e-rideables in working order are in your household?

Base: All main respondents; 2011 (n=9,189), 203 (n=10,039), 2015 (n=8,370), 2017 (n=4,431), 2019 (n=5,100), 2021 (n=4,473), 2023 (n=3,659), 2025 (n=4,796)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Regular Bicycle Ownership by State

…as well as ACT, SA, NT, and TAS. Across all states, household ownership of three or more regular bicycles is steadily declining, while the share of households owning no bikes or just one is rising.



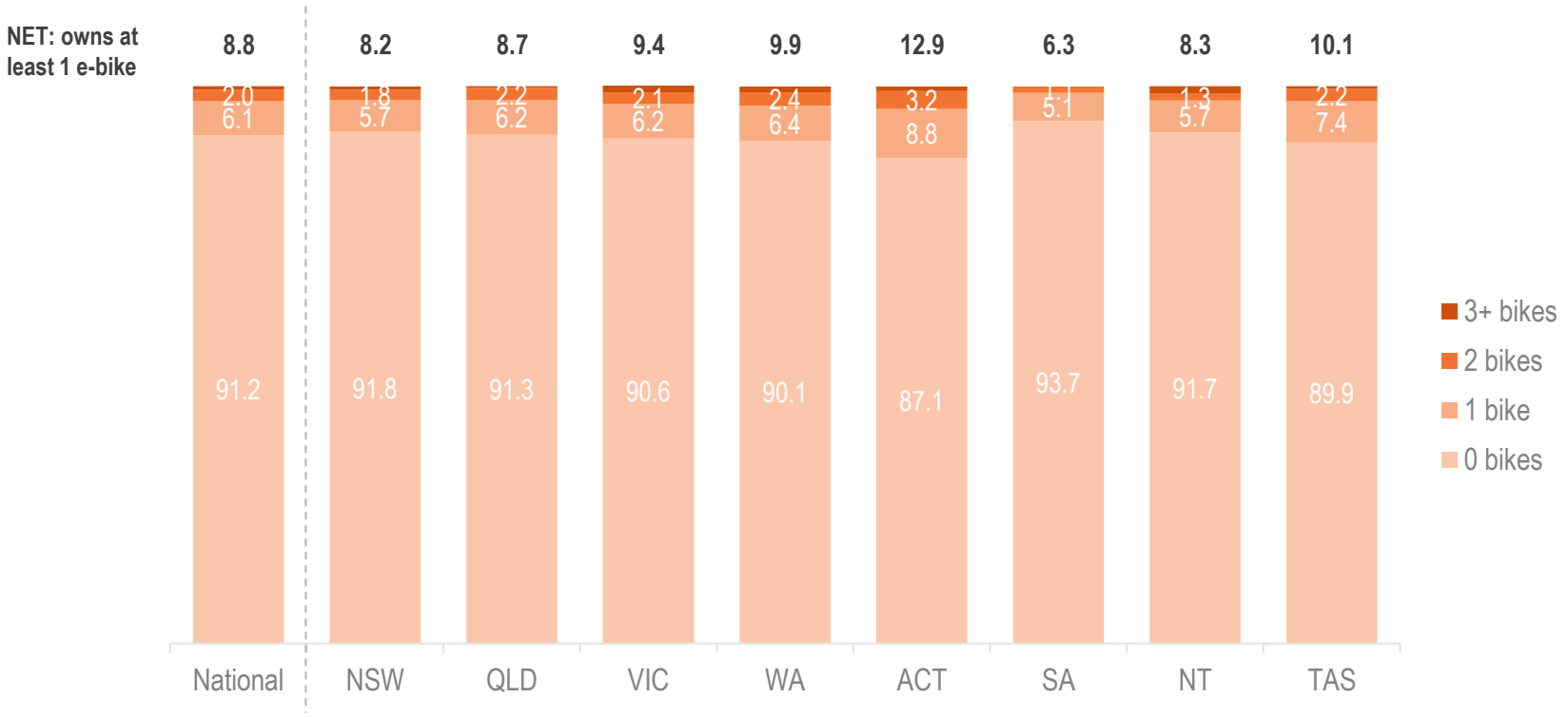
Q46. How many bicycles, e-bikes and e-rideables in working order are in your household?

Base: All main respondents; 2011 (n=9,189), 203 (n=10,039), 2015 (n=8,370), 2017 (n=4,431), 2019 (n=5,100), 2021 (n=4,473), 2023 (n=3,659), 2025 (n=4,796)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

E-bike Ownership by State

Around 1 in 10 Australian households now own an e-bike, with the ACT showing the highest uptake at 13% and SA the lowest at 6%.



Q46. How many bicycles, e-bikes and e-rideables in working order are in your household?
Base: All main respondents (n=4,796)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

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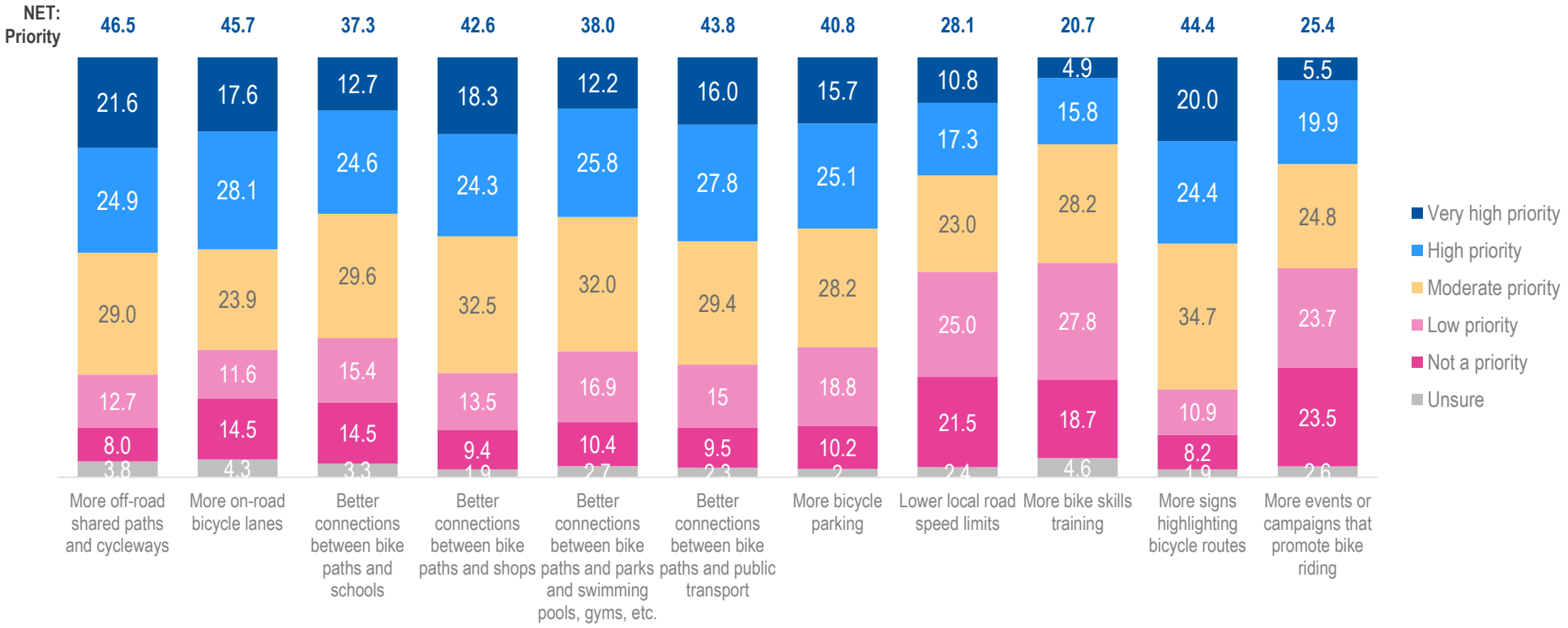
Cycling – Priority Actions

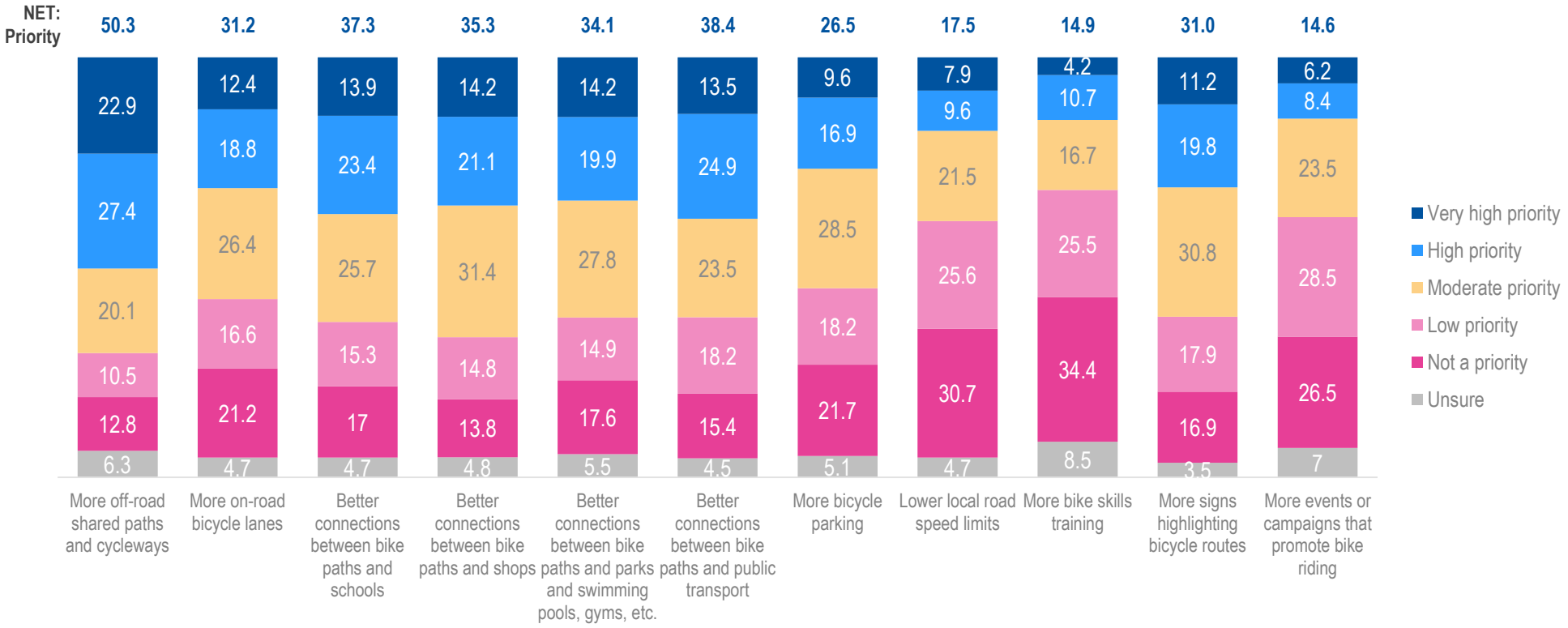
Priority Actions – NSW Metro



Q26. There are a number of actions your local area could take to encourage bike riding in the area. Please rate how much of a priority are each of the following actions.
Base: Online Main Respondent from NSW Metro (n=225)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

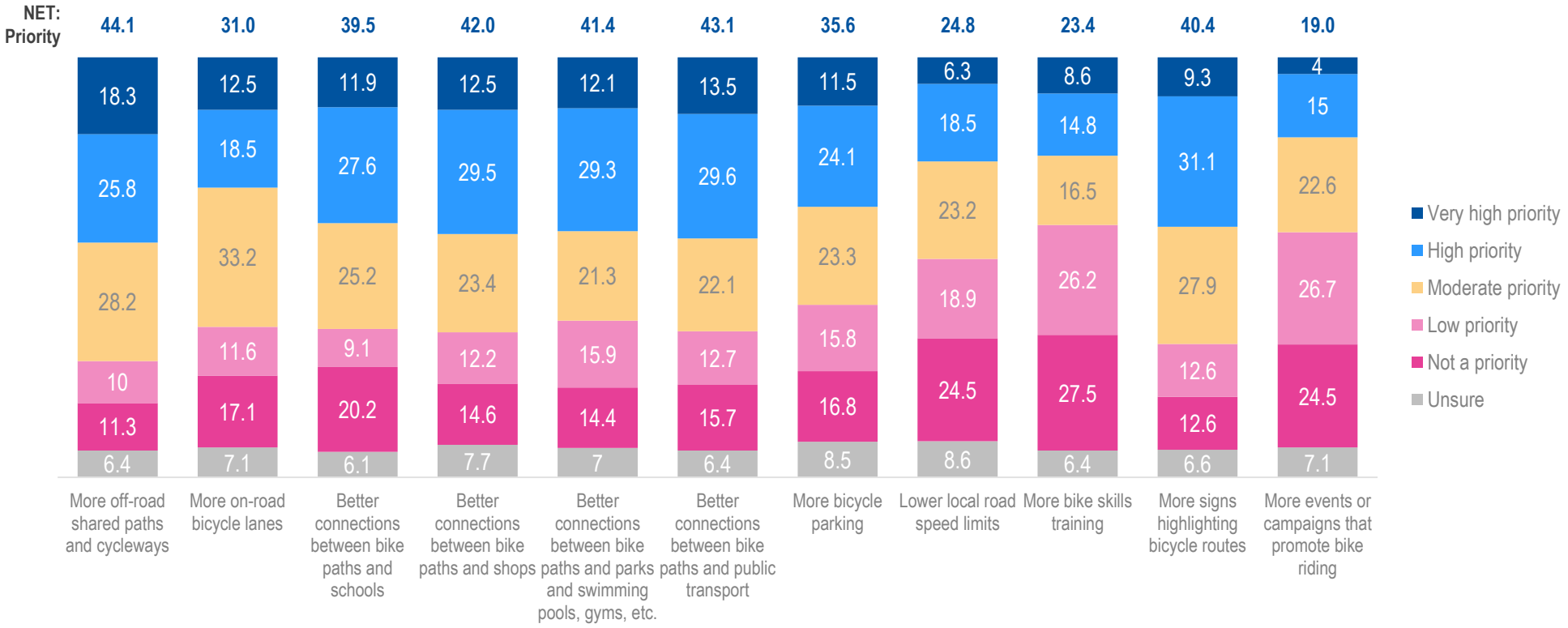
Priority Actions – QLD Metro



Q26. There are a number of actions your local area could take to encourage bike riding in the area. Please rate how much of a priority are each of the following actions.
Base: Online Main Respondent from QLD Metro (n=269)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

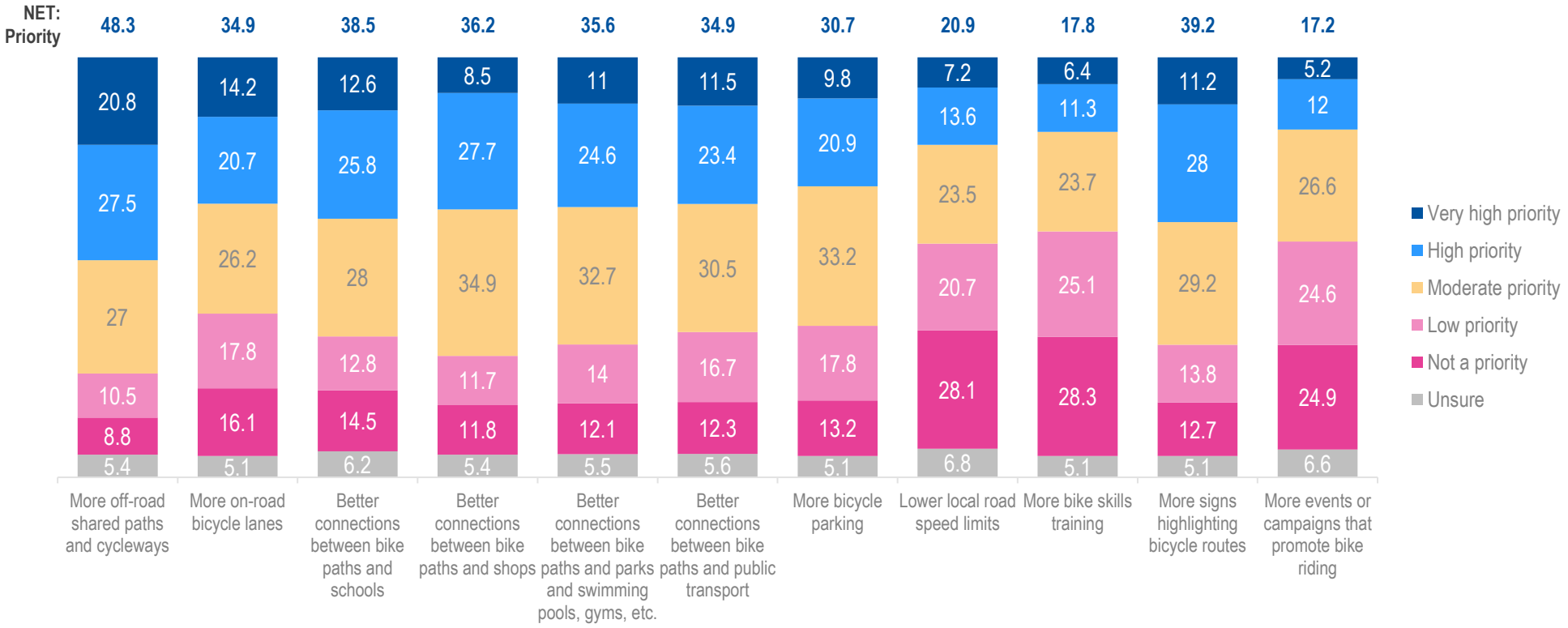
Priority Actions – VIC Metro



Q26. There are a number of actions your local area could take to encourage bike riding in the area. Please rate how much of a priority are each of the following actions.
Base: Online Main Respondent from VIC Metro (n=153)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

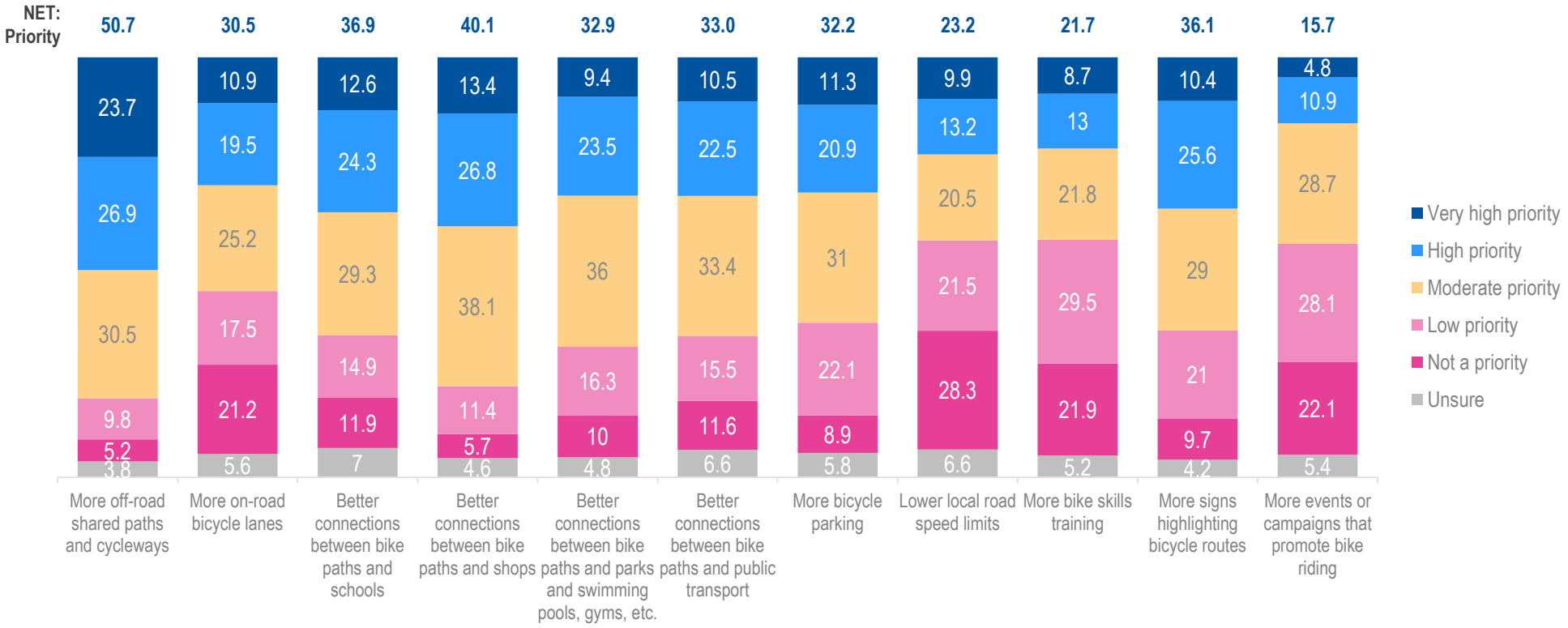
Priority Actions – WA Metro



Q26. There are a number of actions your local area could take to encourage bike riding in the area. Please rate how much of a priority are each of the following actions.
Base: Online Main Respondent from WA Metro (n=420)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

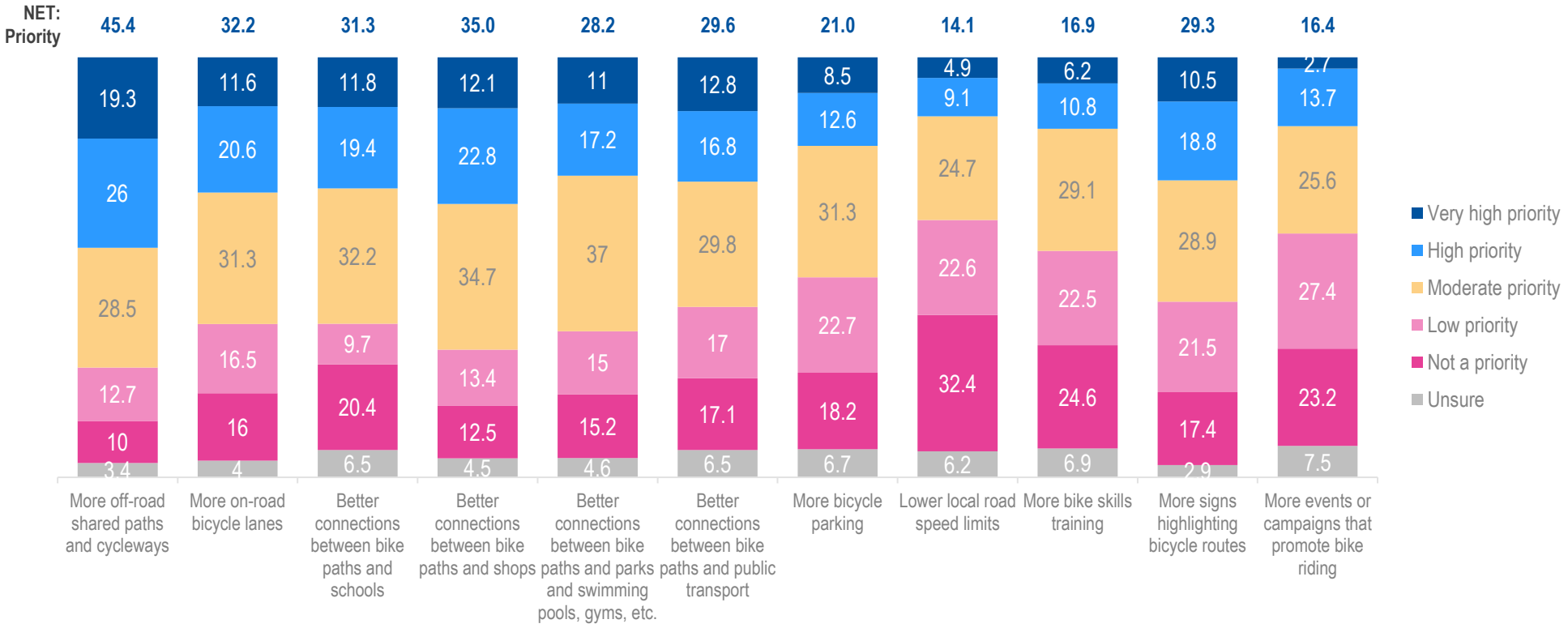
Priority Actions – ACT Metro



Q26. There are a number of actions your local area could take to encourage bike riding in the area. Please rate how much of a priority are each of the following actions.
Base: Online Main Respondent from ACT Metro (n=220)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

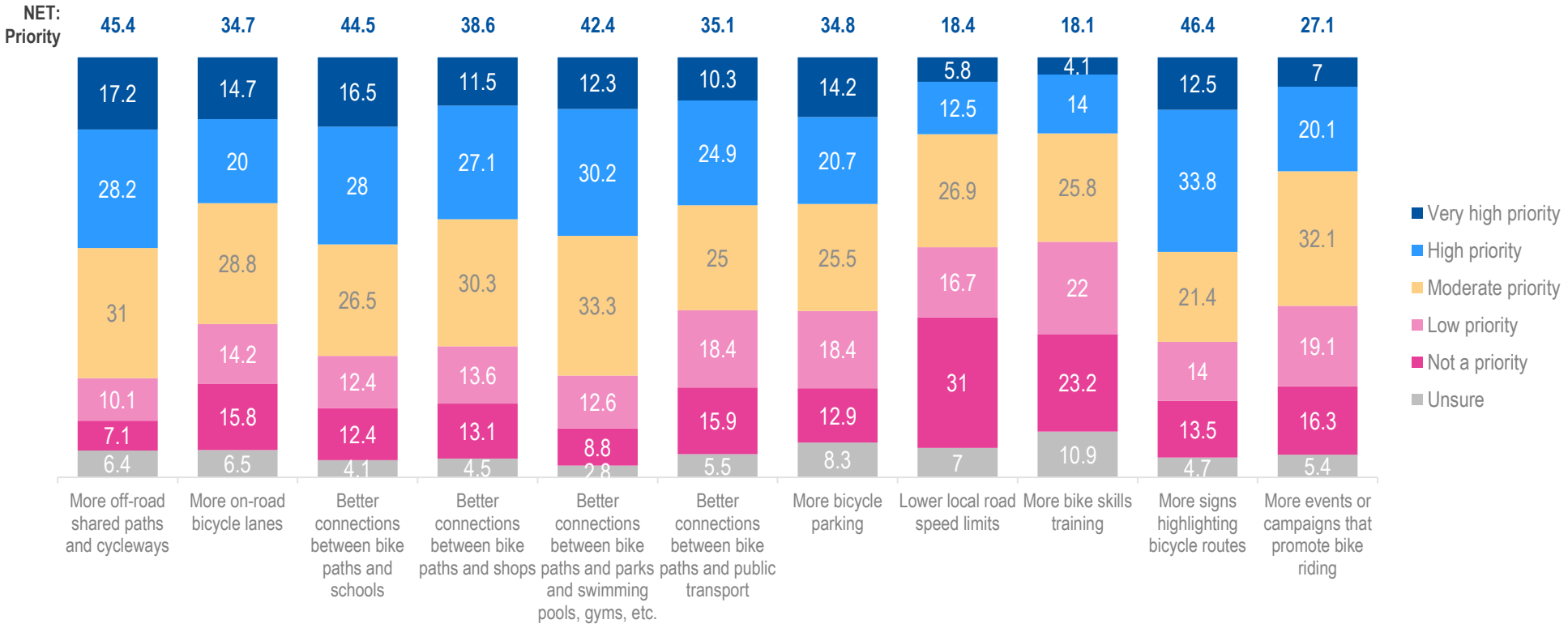
Priority Actions – SA Metro



Q26. There are a number of actions your local area could take to encourage bike riding in the area. Please rate how much of a priority are each of the following actions.
Base: Online Main Respondent from SA Metro (n=164)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

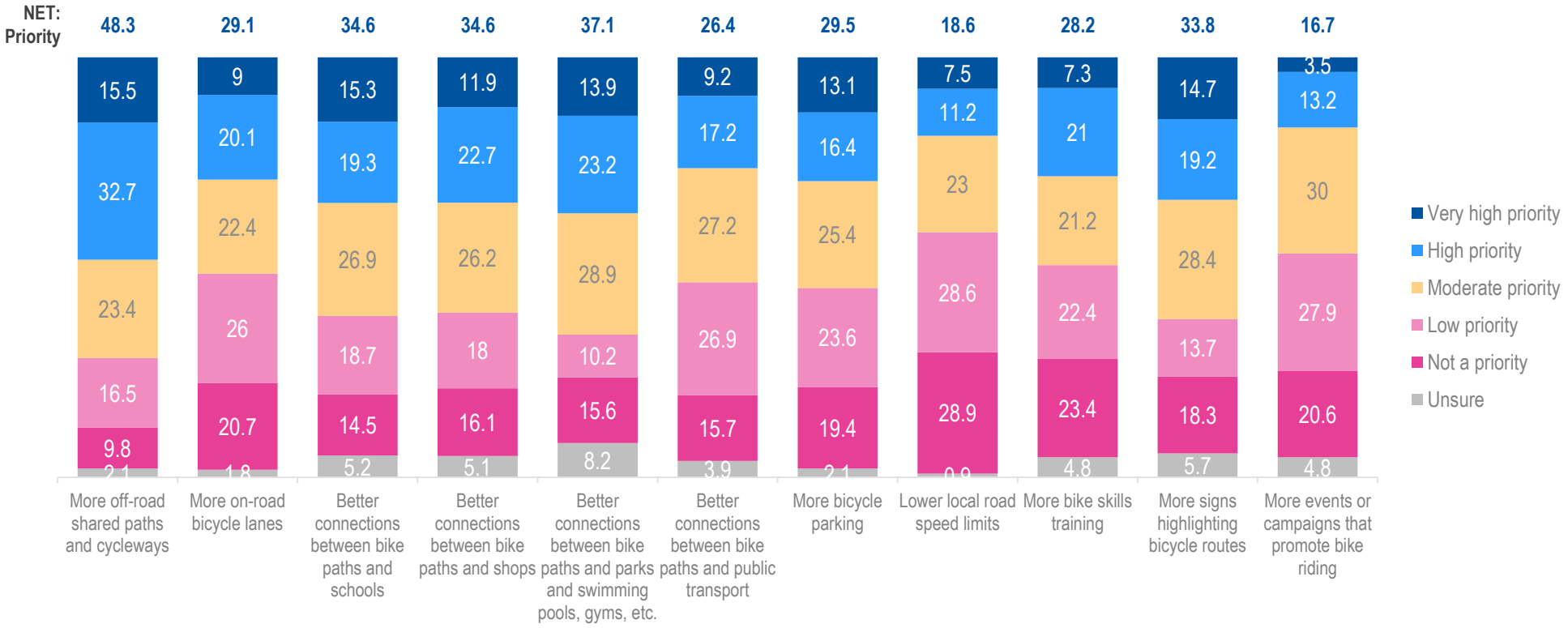
Priority Actions – NT Metro



Q26. There are a number of actions your local area could take to encourage bike riding in the area. Please rate how much of a priority are each of the following actions.
Base: Online Main Respondent from NT Metro (n=146)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Priority Actions – TAS Metro



Q26. There are a number of actions your local area could take to encourage bike riding in the area. Please rate how much of a priority are each of the following actions.
Base: Online Main Respondent from TAS Metro (n=89)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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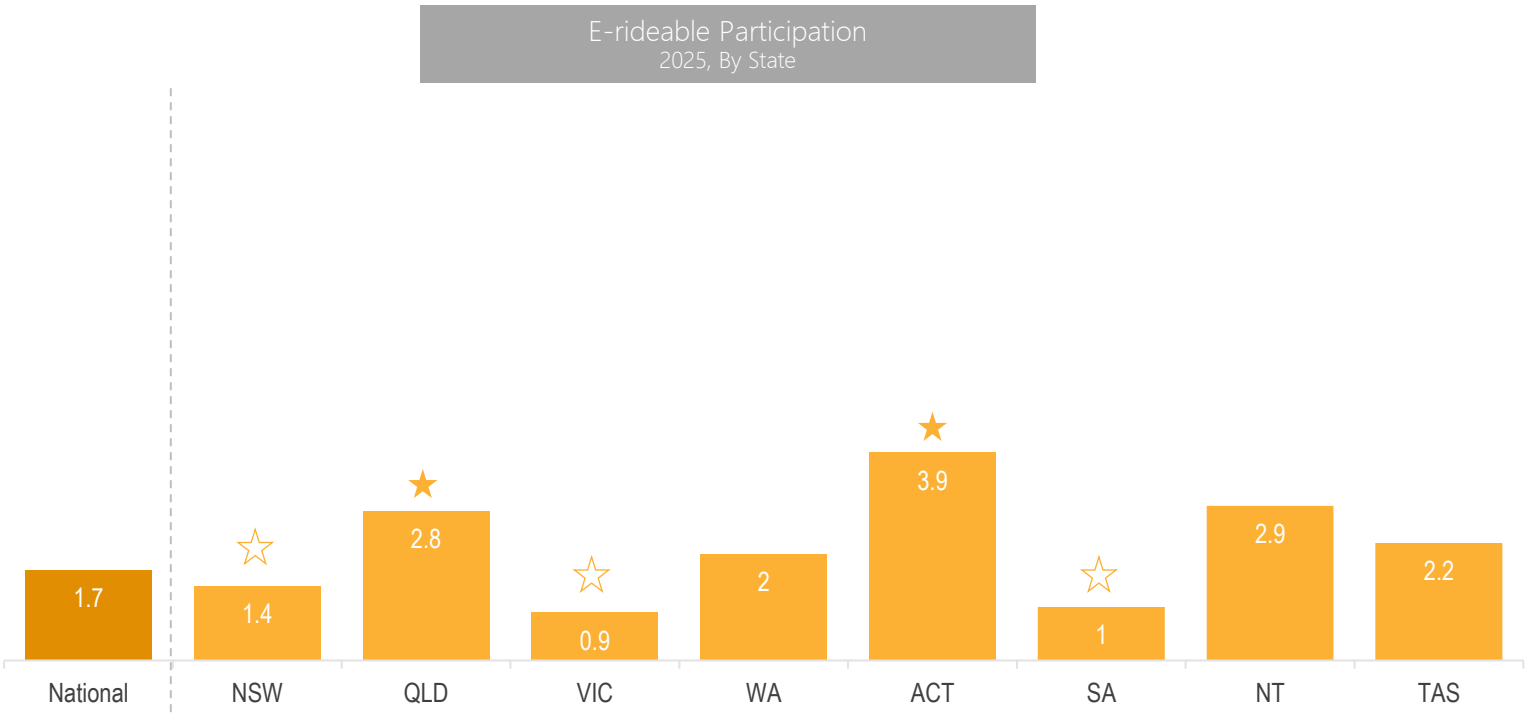
E-Rideables

Definition of E-Rideables

E-Rideables refers to personal mobility devices (PMDs), specifically including e-scooters and e-skateboards, as defined in the survey questionnaire. These are compact, powered transport devices typically used for short-distance urban travel. The term excludes e-bikes, which were measured separately.

Electric mobility is growing, but regular usage remains niche.

Around 3% of Australian households now own an e-rideable and 2% use one weekly. Usage remains low across all states, though the ACT leads at 4%. This suggests that while interest in electric mobility is emerging, e-rideables are still a niche mode of transport with limited regular uptake.

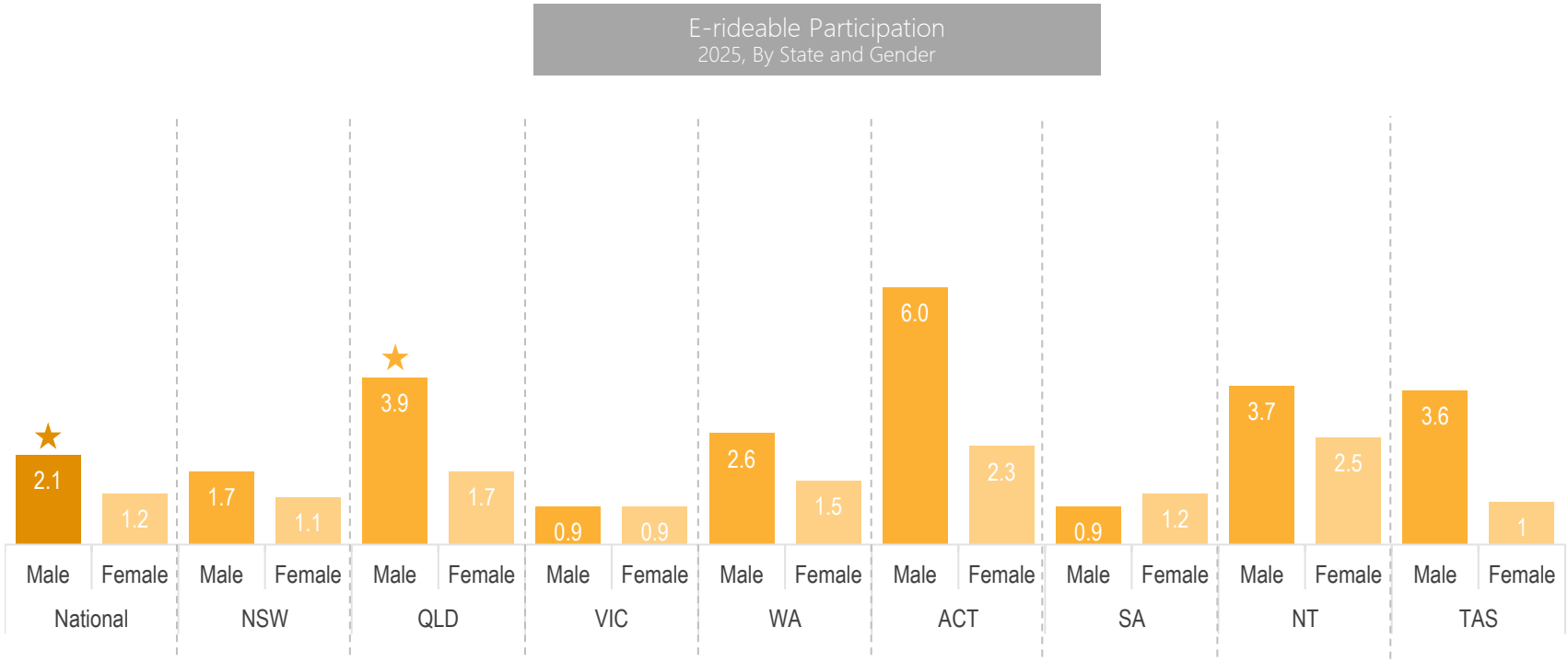


Q4 / Q37. Have you used any of the following modes of transport in the last 7 days?
Base: All respondents (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Men are leading early adoption of e-rideables.

Males are consistently more likely than females to report weekly e-rideable use, with the gap most pronounced in the ACT, NT, and TAS. This suggests early adoption is being driven more by men, particularly in states with higher usage overall.



Q4 / Q37. Have you used any of the following modes of transport in the last 7d days? Base: All respondents (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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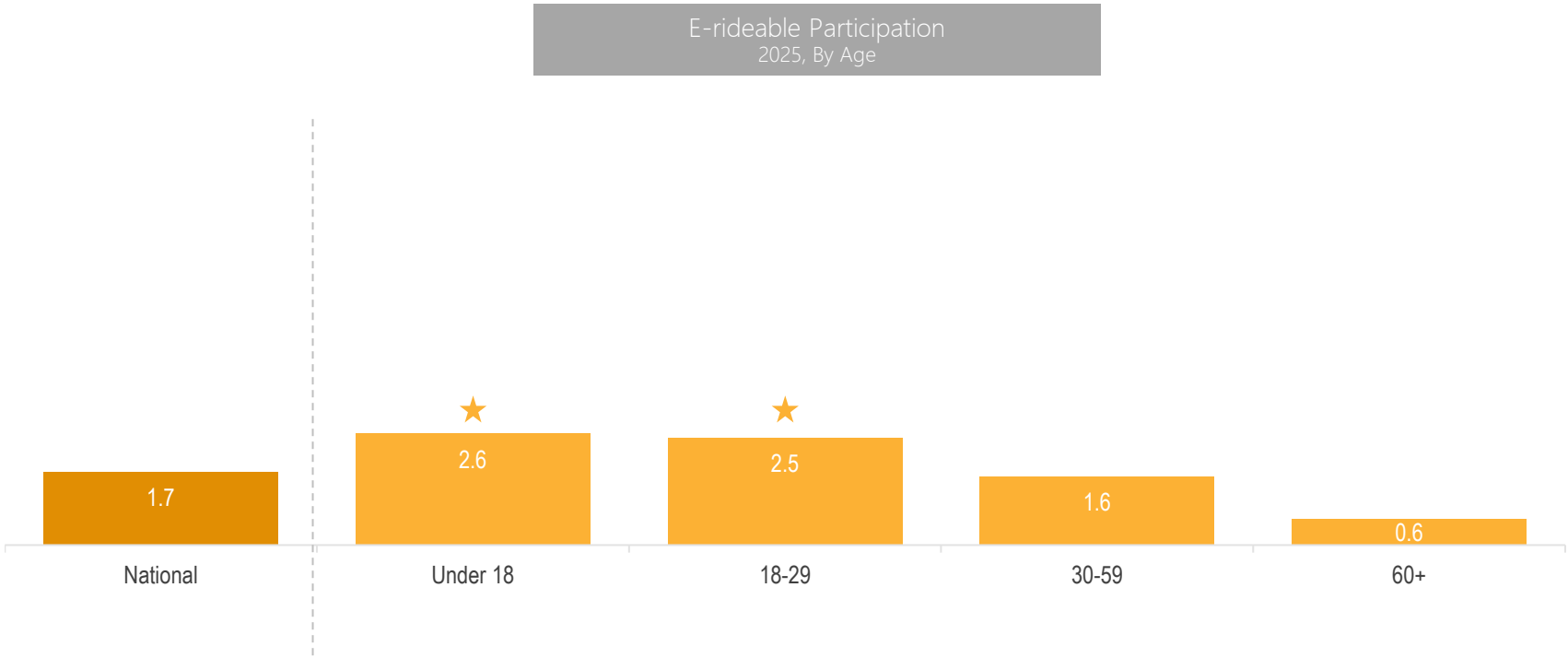
Younger Australians also tend to use e-rideables more.



Q4 / Q37. Have you used any of the following modes of transport in the last 7d days? Base: All respondents (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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Appendices

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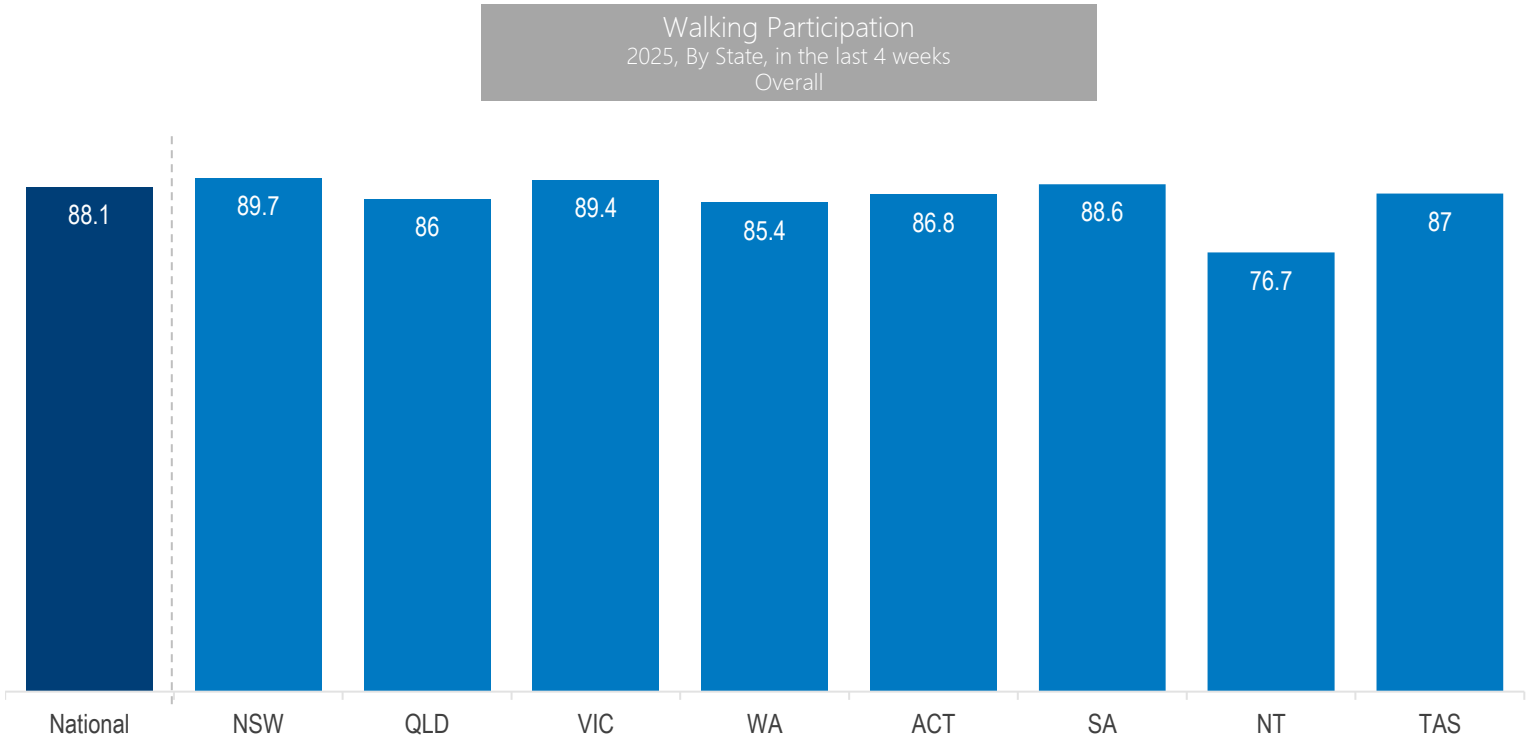
Appendix 1 – Additional Charts

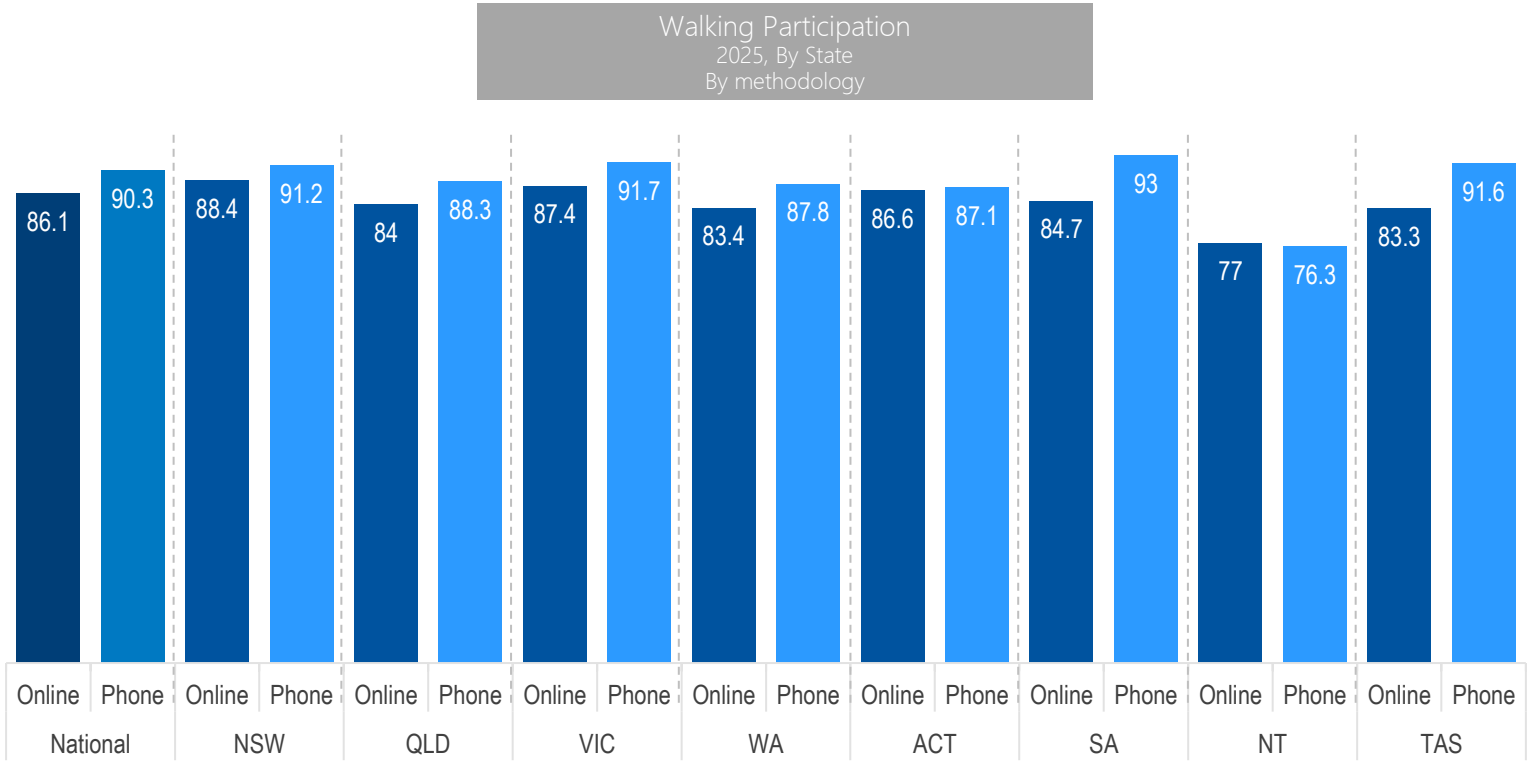
Monthly Walking Participation (state)



Q6 / Q39 & Q8 / Q40. Walking participation.
Base: All Respondents over 2 years old (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Monthly Walking Participation (State)
by methodology

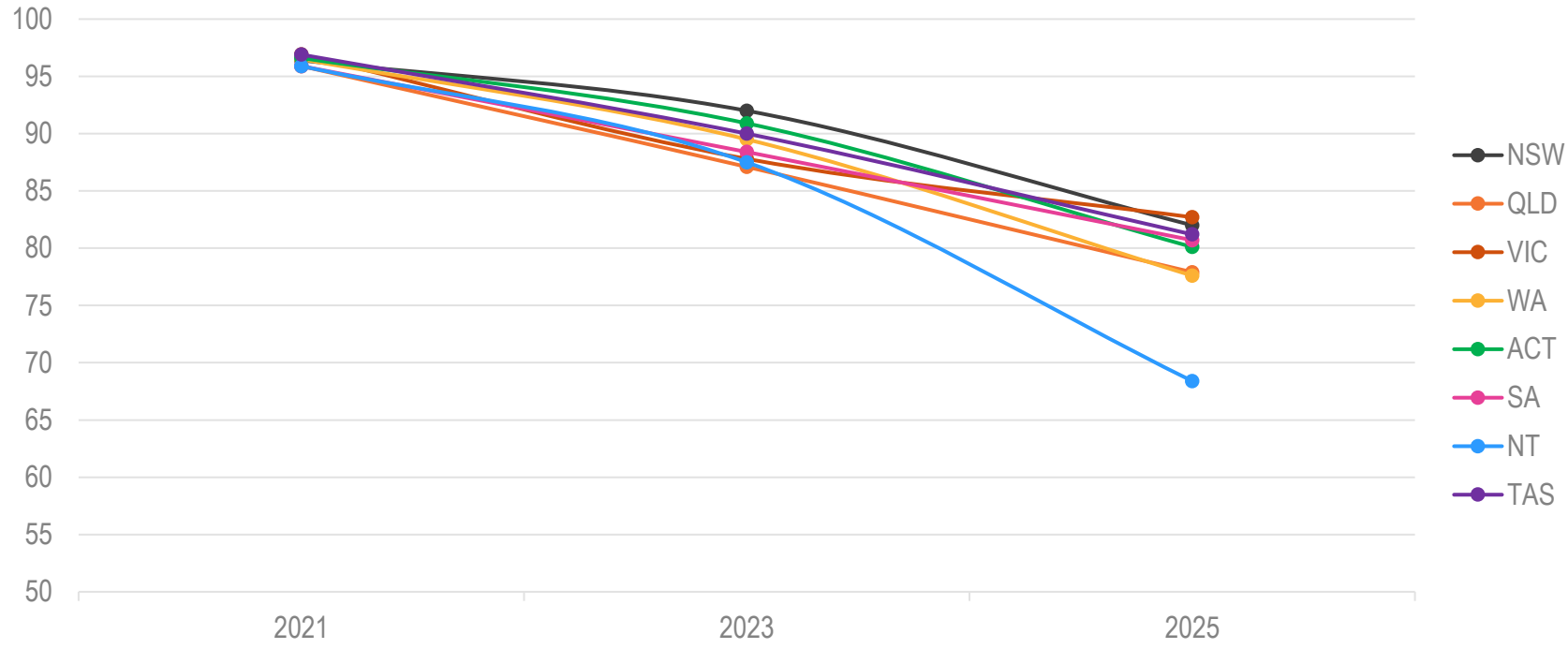


Q6 / Q39 & Q8 / Q40. Walking participation.
Base: All Respondents over 2 years old (n=12,186), Online (n=6,482), Phone (n=5,704).

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Walking Participation

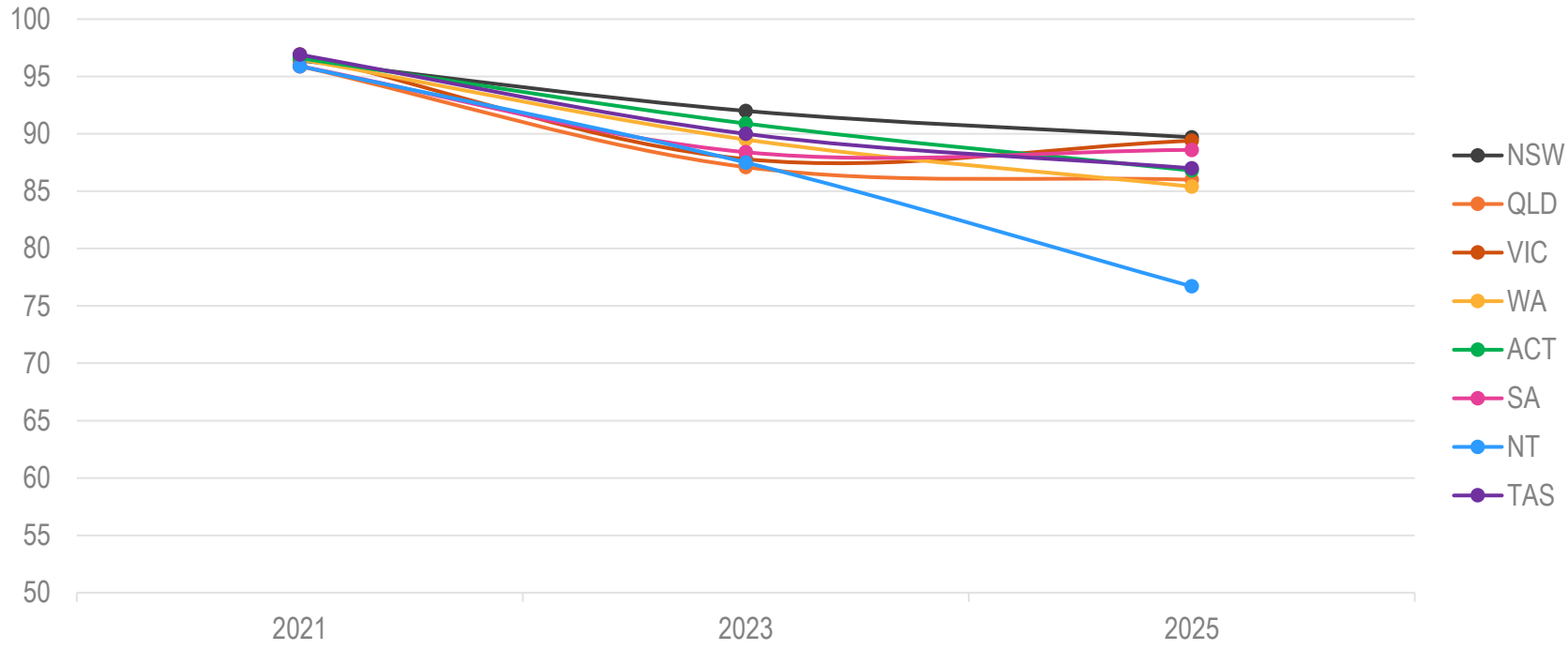
by year and state, in the past week



- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Walking Participation

by year and state, in the past month



- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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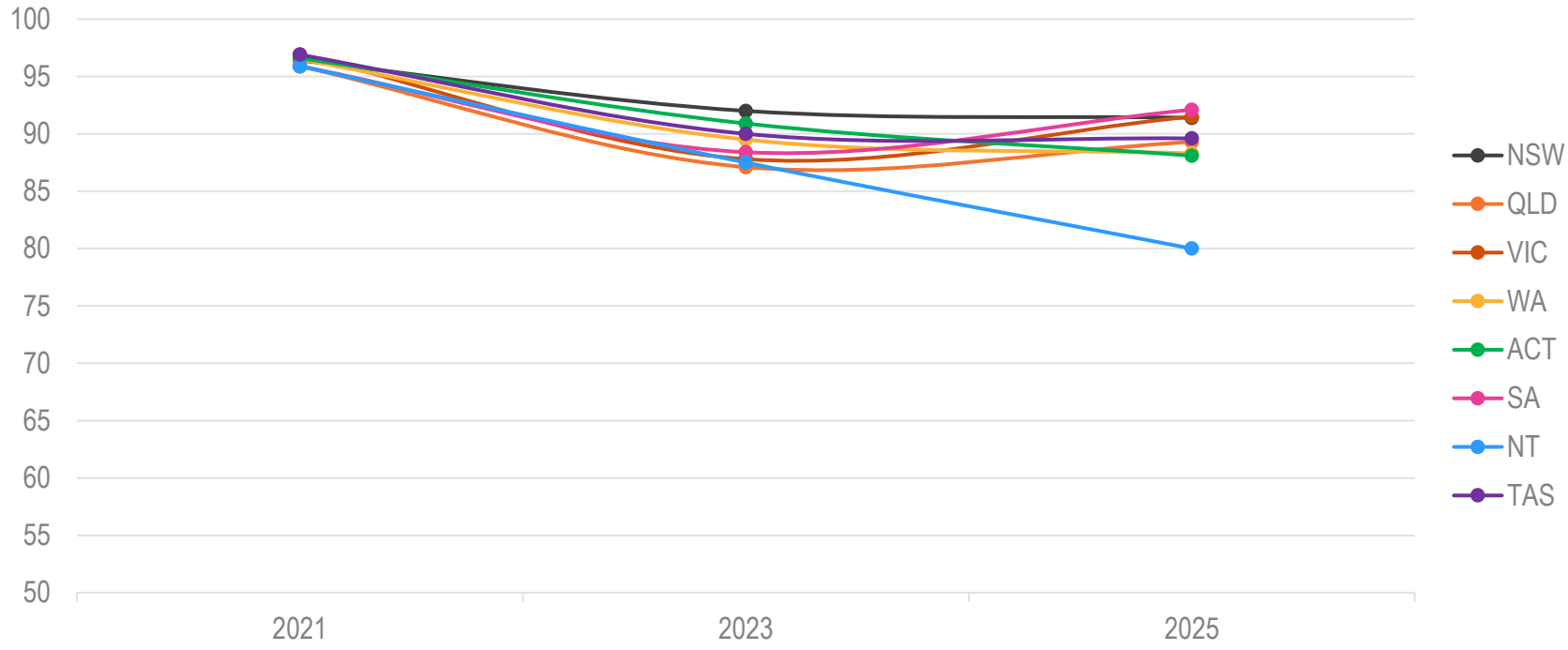
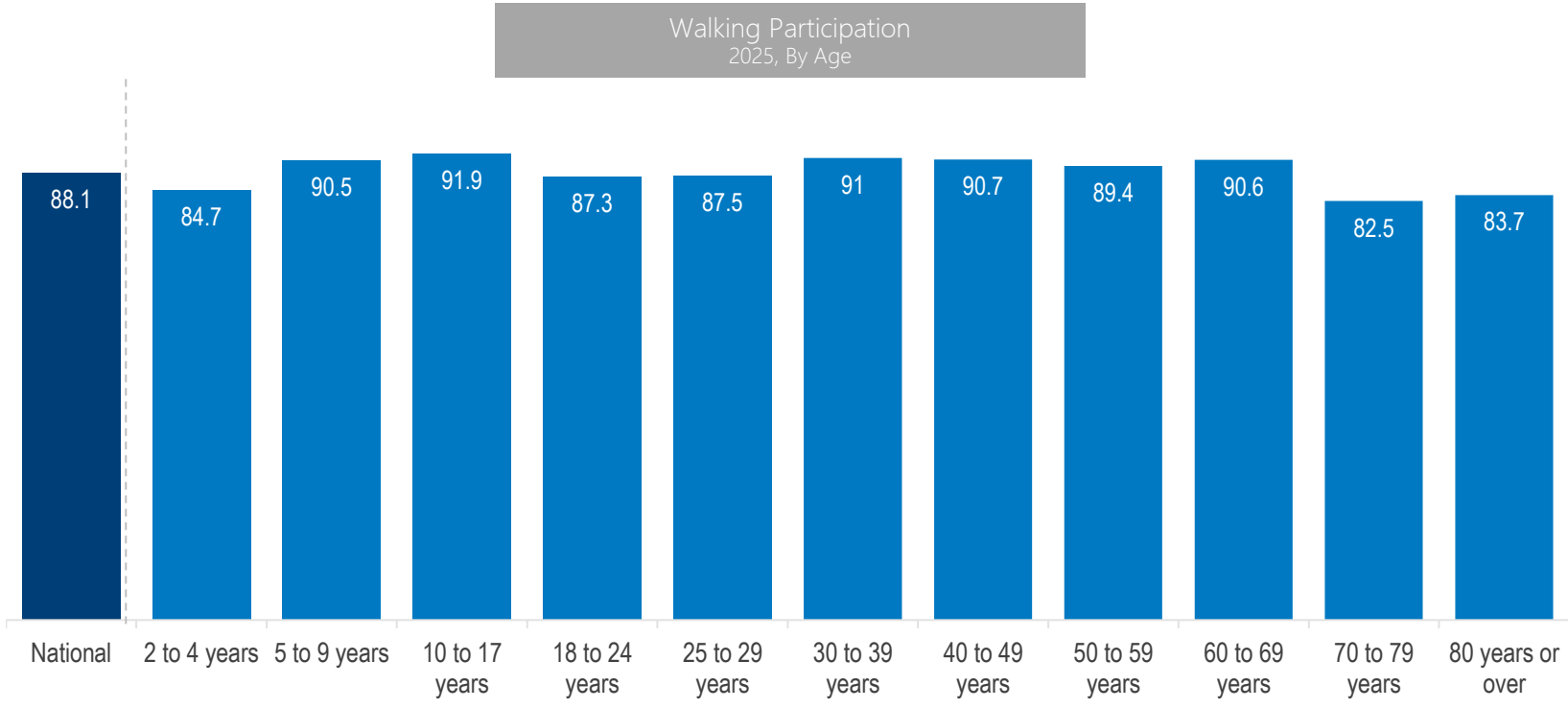
Walking Participation

by year and state, in the past year



- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

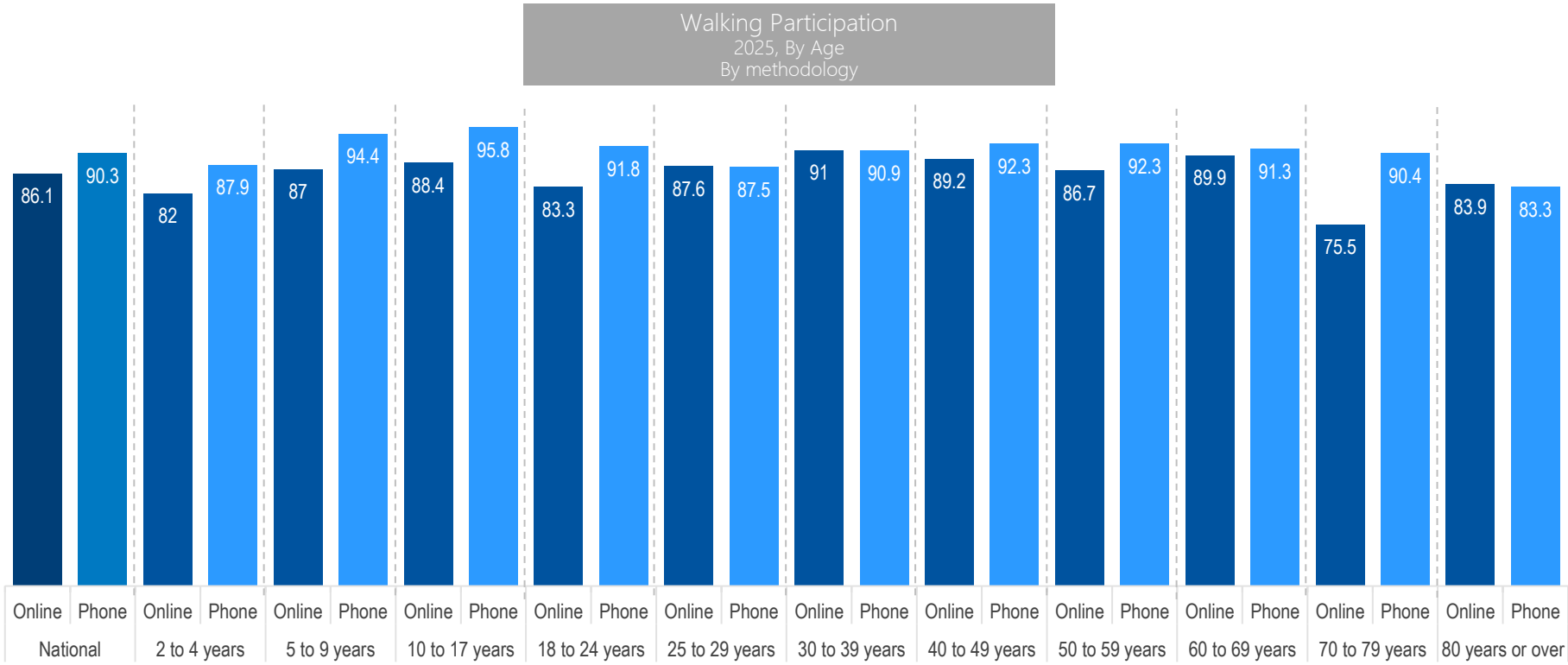
Monthly Walking Participation (Age)



Q6 / Q39 & Q8 / Q40. Walking participation.
Base: All Respondents over 2 years old (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

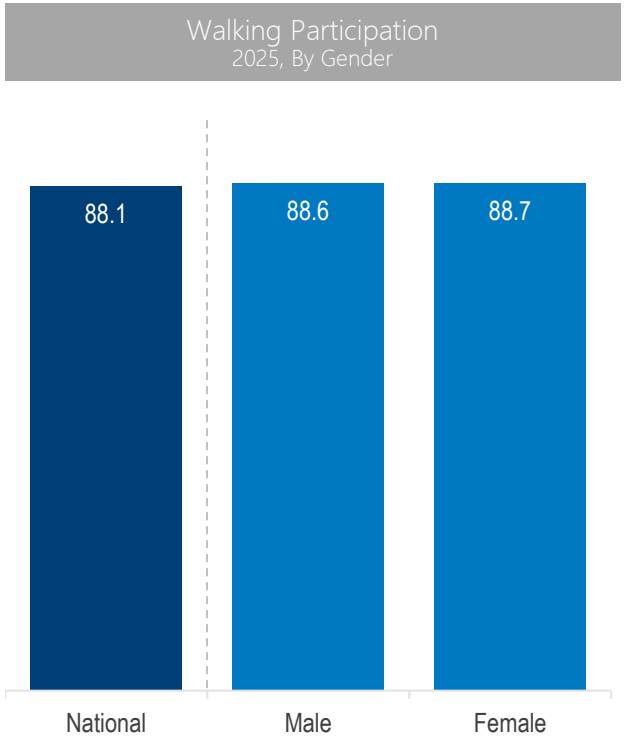
Monthly Walking Participation (Age)
by methodology

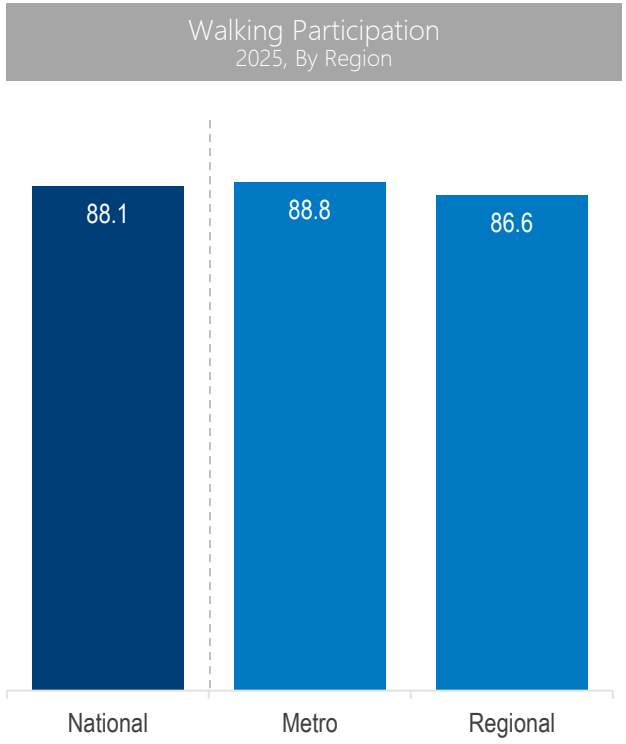


Q6 / Q39 & Q8 / Q40. Walking participation.
Base: All Respondents over 2 years old (n=12,186), Online (n=6,482), Phone (n=5,704).

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Monthly Walking Participation (Gender & Location)

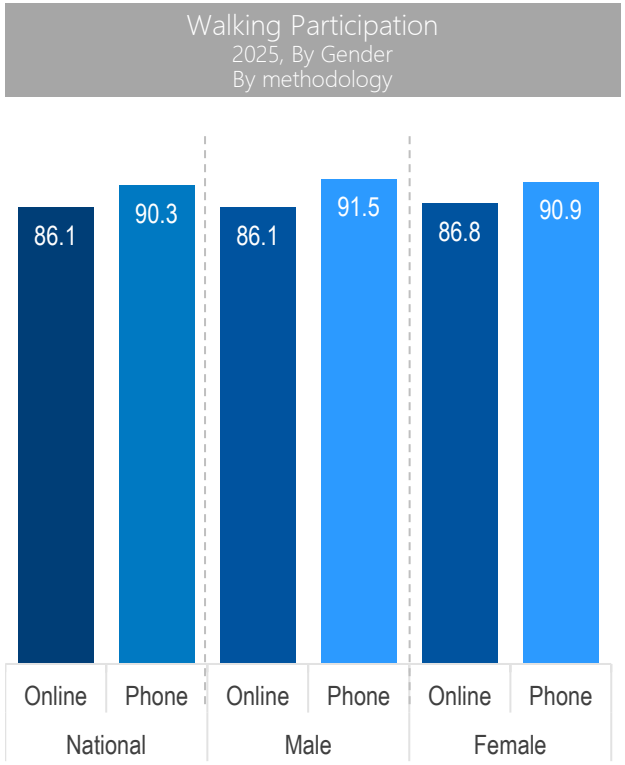


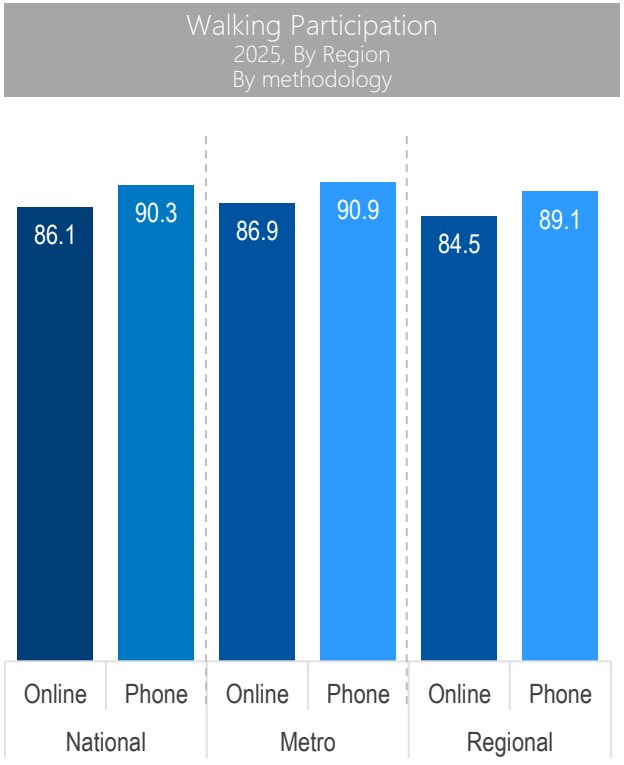


Q6 / Q39 & Q8 / Q40. Walking participation.
Base: All Respondents over 2 years old (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Monthly Walking Participation (Gender & Location)
by methodology

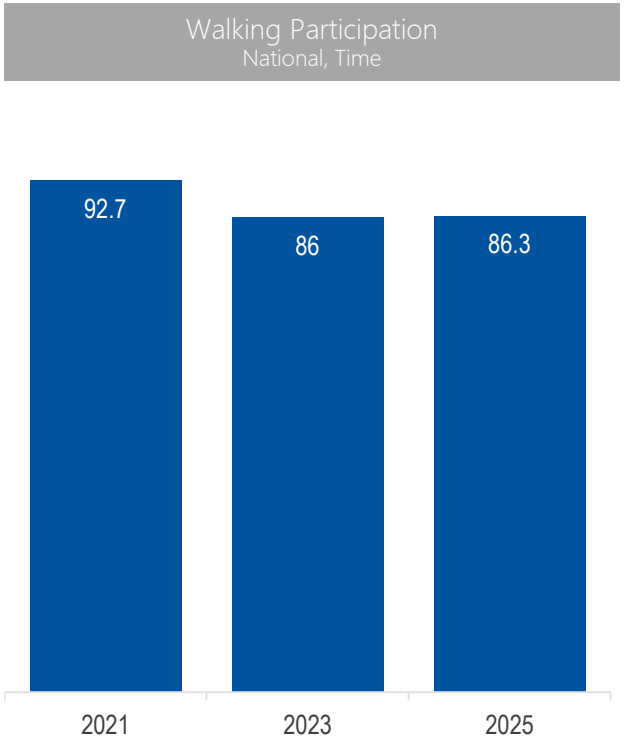




Q6 / Q39 & Q8 / Q40. Walking participation.
Base: All Respondents over 2 years old (n=12,186), Online (n=6,482), Phone (n=5,704).

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Monthly Walking Participation (Over Time)

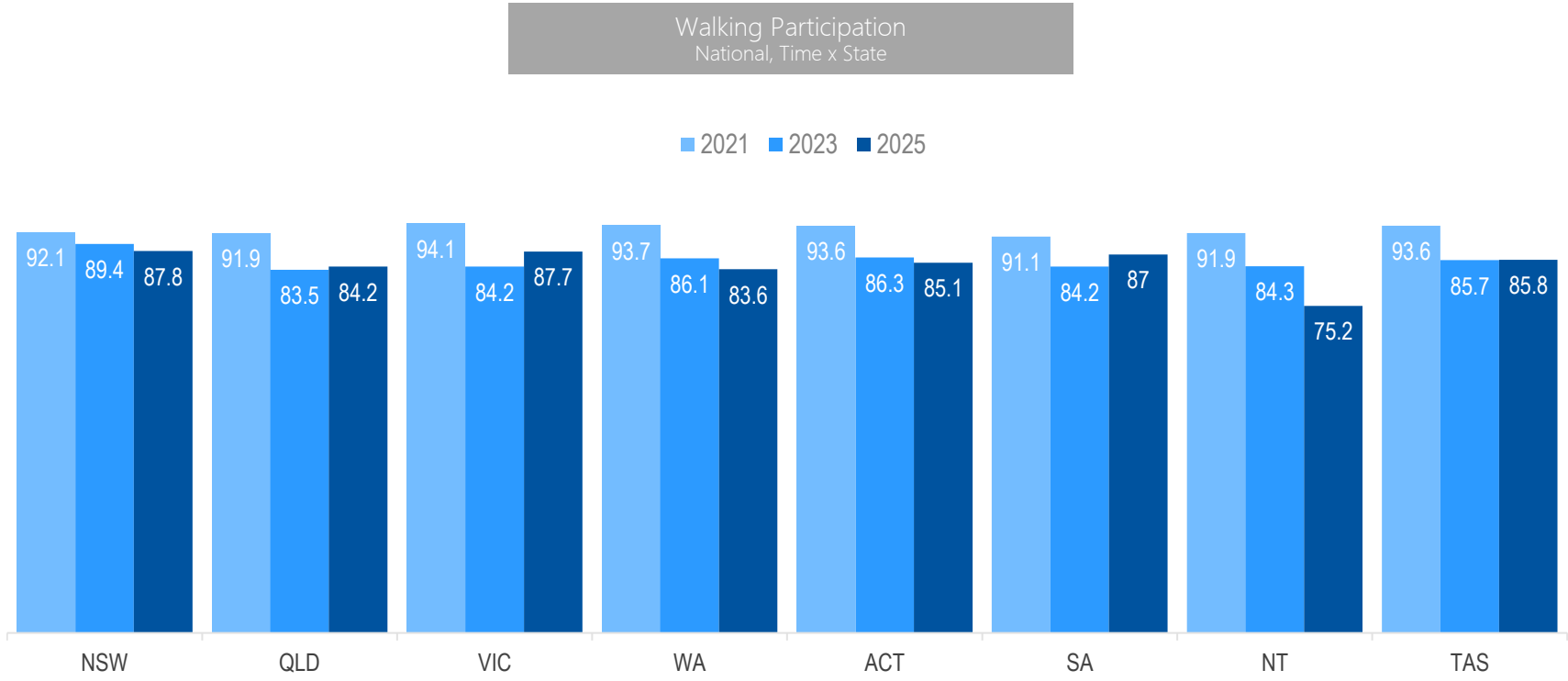


Q6 / Q39 & Q8 / Q40. Walking participation.

Base: All Respondents above 2 years old, 2021 (n=11,415), 2021 (n=9,189), 2025 (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Monthly Walking Participation (Over Time by State)



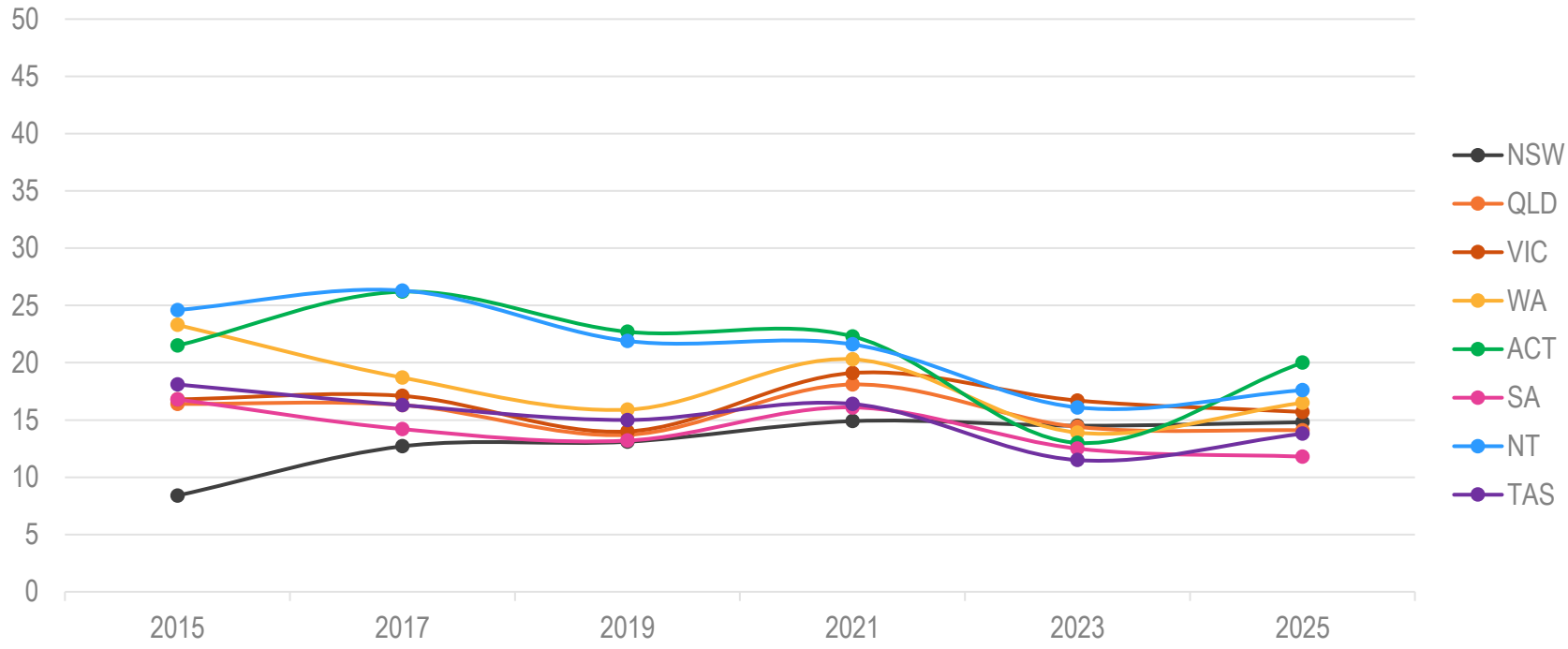
Q6 / Q39 & Q8 / Q40. Walking participation.

Base: All Respondents above 2 years old, 2021 (n=11,415), 2021 (n=9,189), 2025 (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Cycling Participation

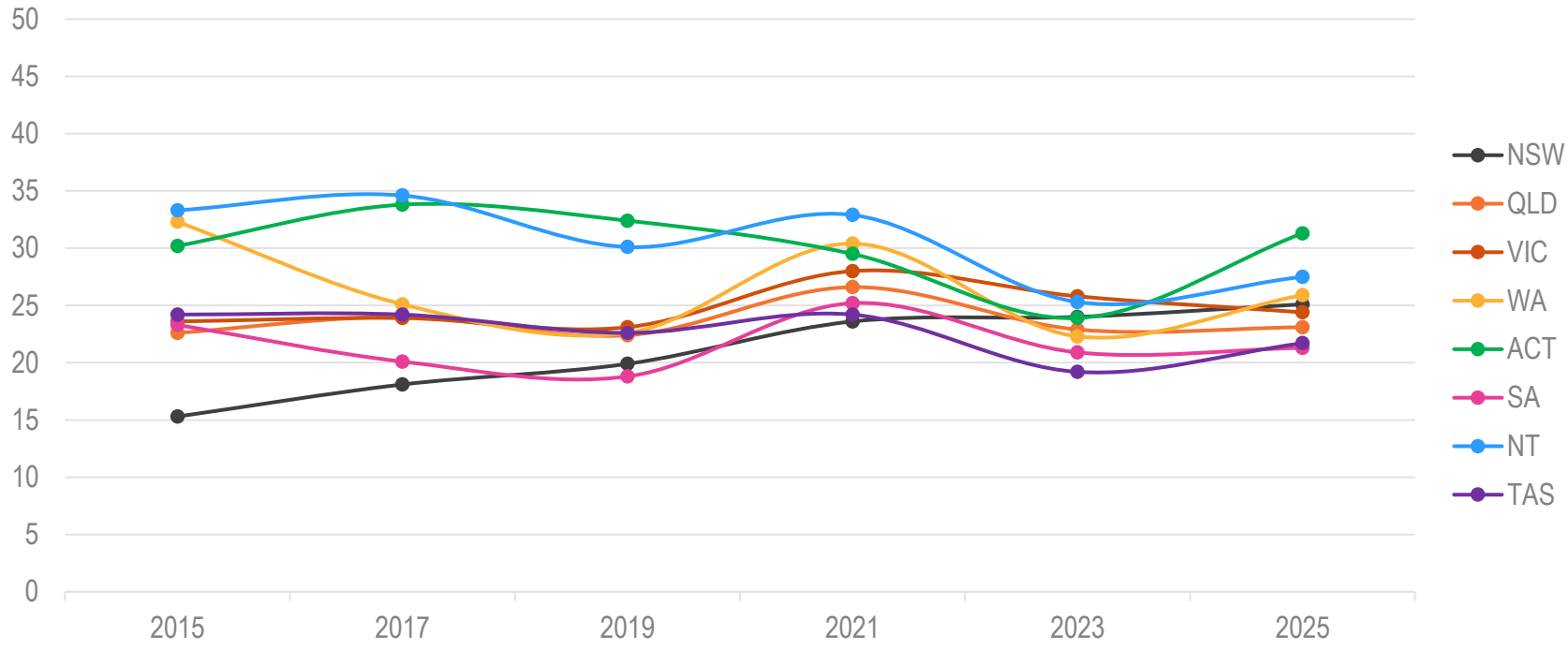
by year and state, in the past week



- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Cycling Participation

by year and state, in the past month



- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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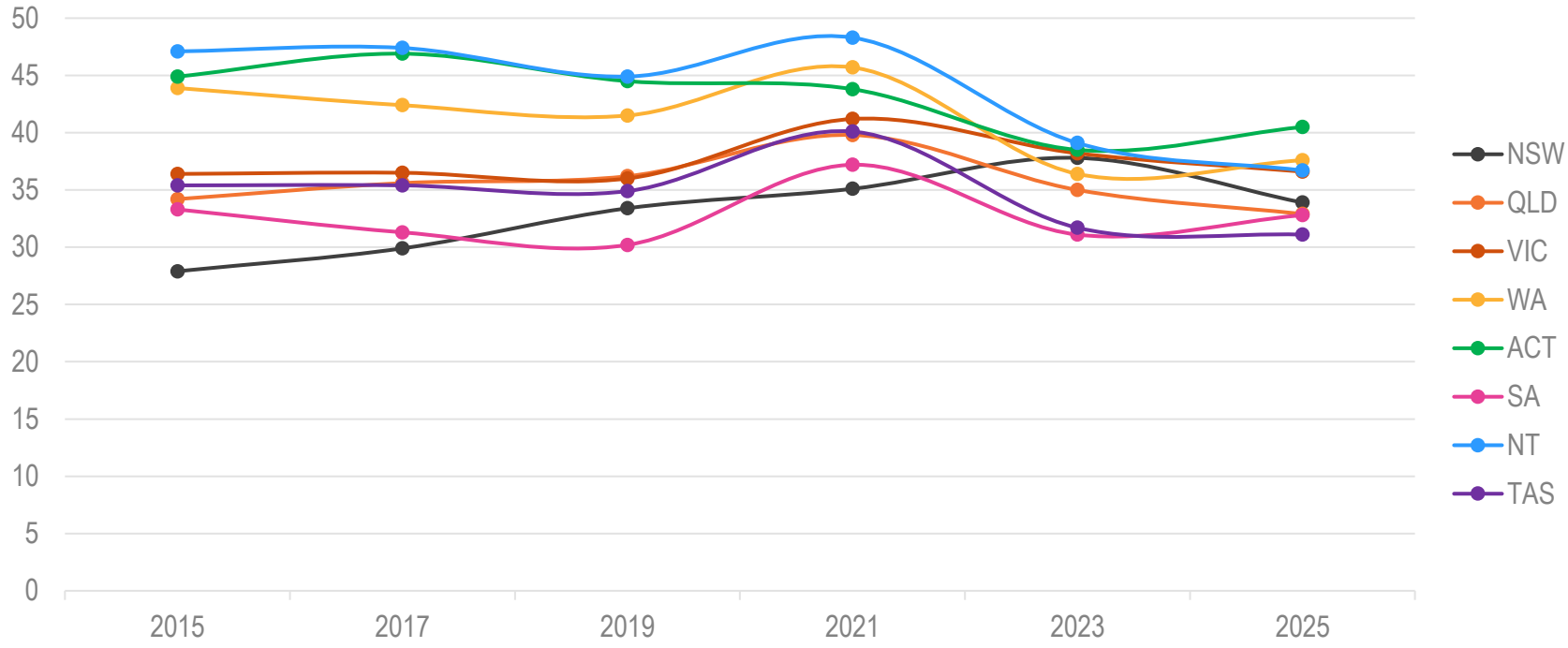
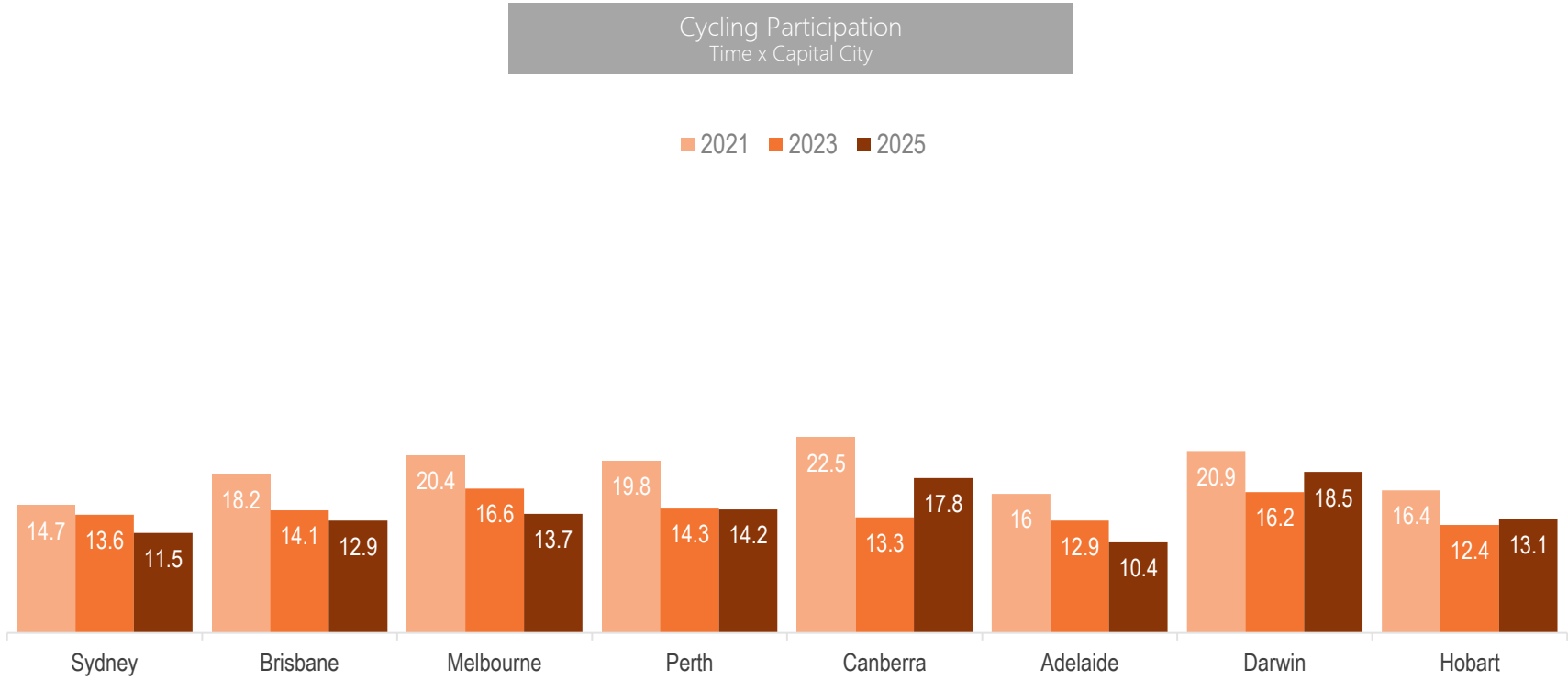
Cycling Participation

by year and state, in the past year



- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

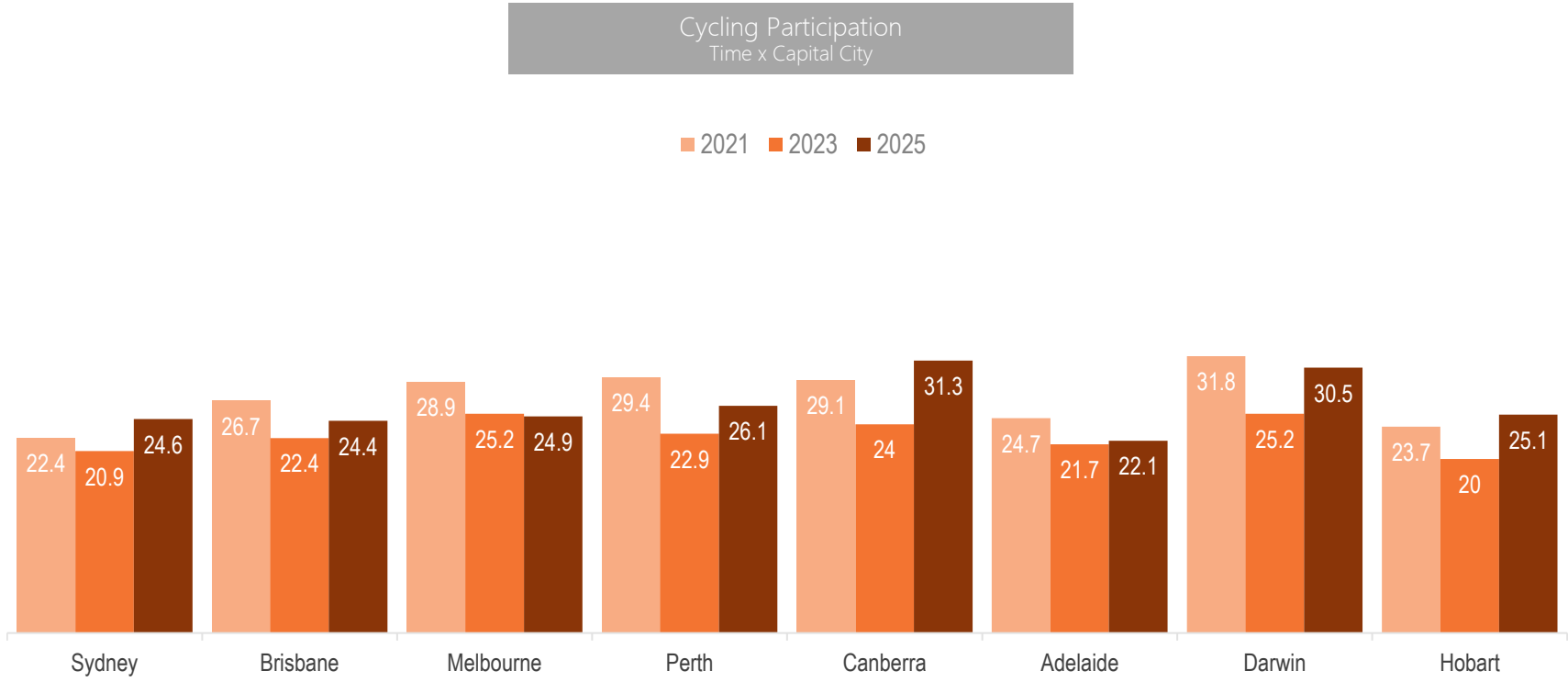
Cycling Participation - weekly
(year & capital city)



Q4 / Q37. Have you used any of the following modes of transport in the last 7d days?
Base: All respondents , 2021 (n=11,274), 2023 (n=8,969), 2025 (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Cycling Participation – monthly
(year & capital city)



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- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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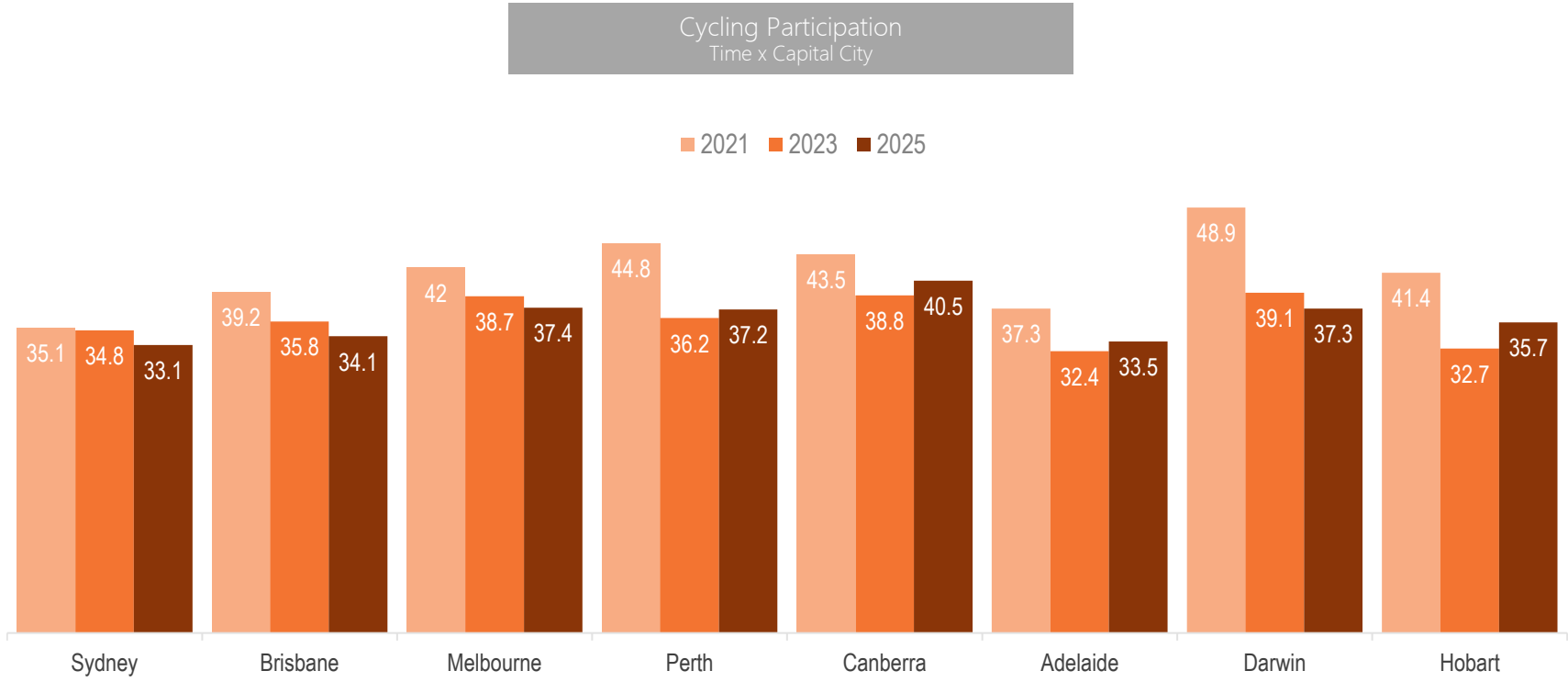
Cycling Participation – yearly
(year & capital city)



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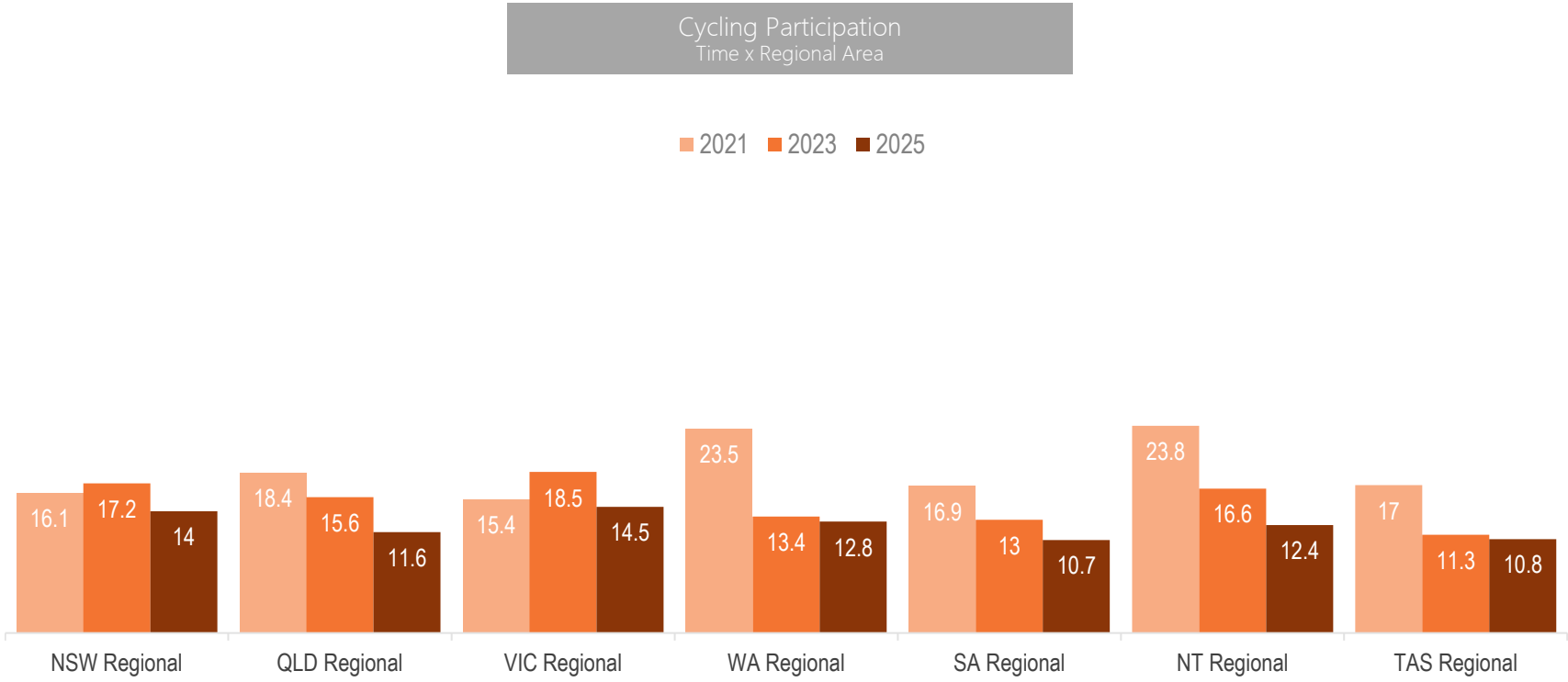
- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Cycling Participation - weekly
(year & regional area)



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Base: All respondents , 2021 (n=11,274), 2023 (n=8,969), 2025 (n=12,186)

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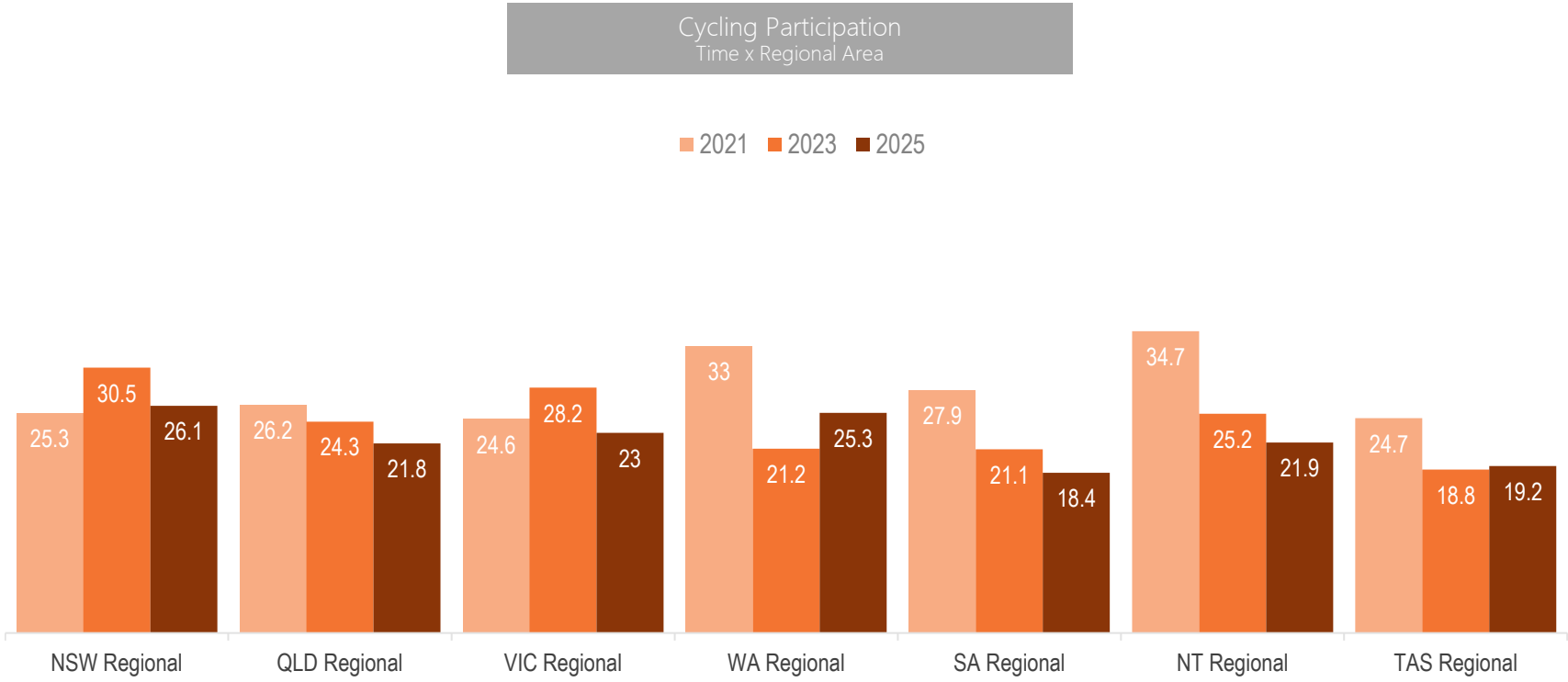
Cycling Participation – monthly
(year & regional area)



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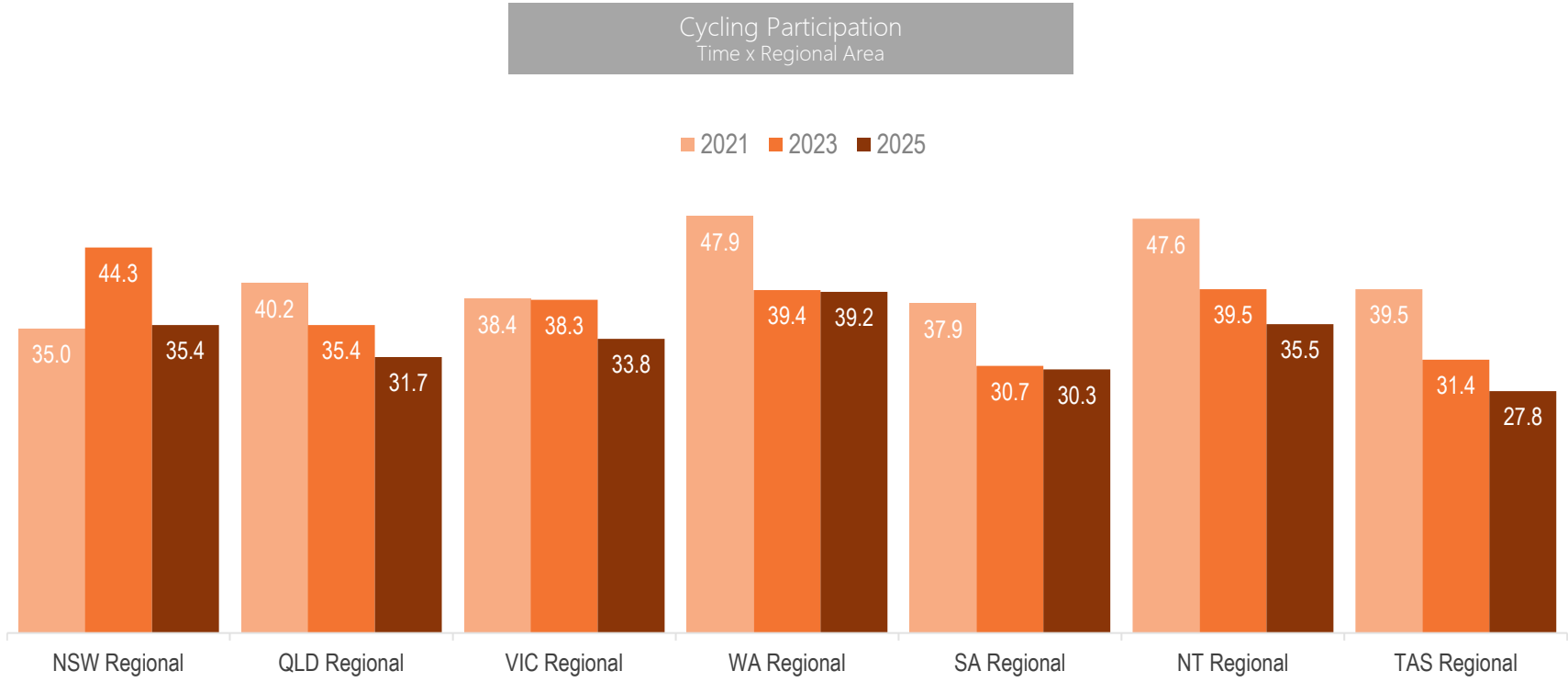
Cycling Participation – yearly
(year & regional area)



Q4 / Q37. Have you used any of the following modes of transport in the last 7d days?
Base: All respondents , 2021 (n=11,415), 2023 (n=9,189), 2025 (n=12,186)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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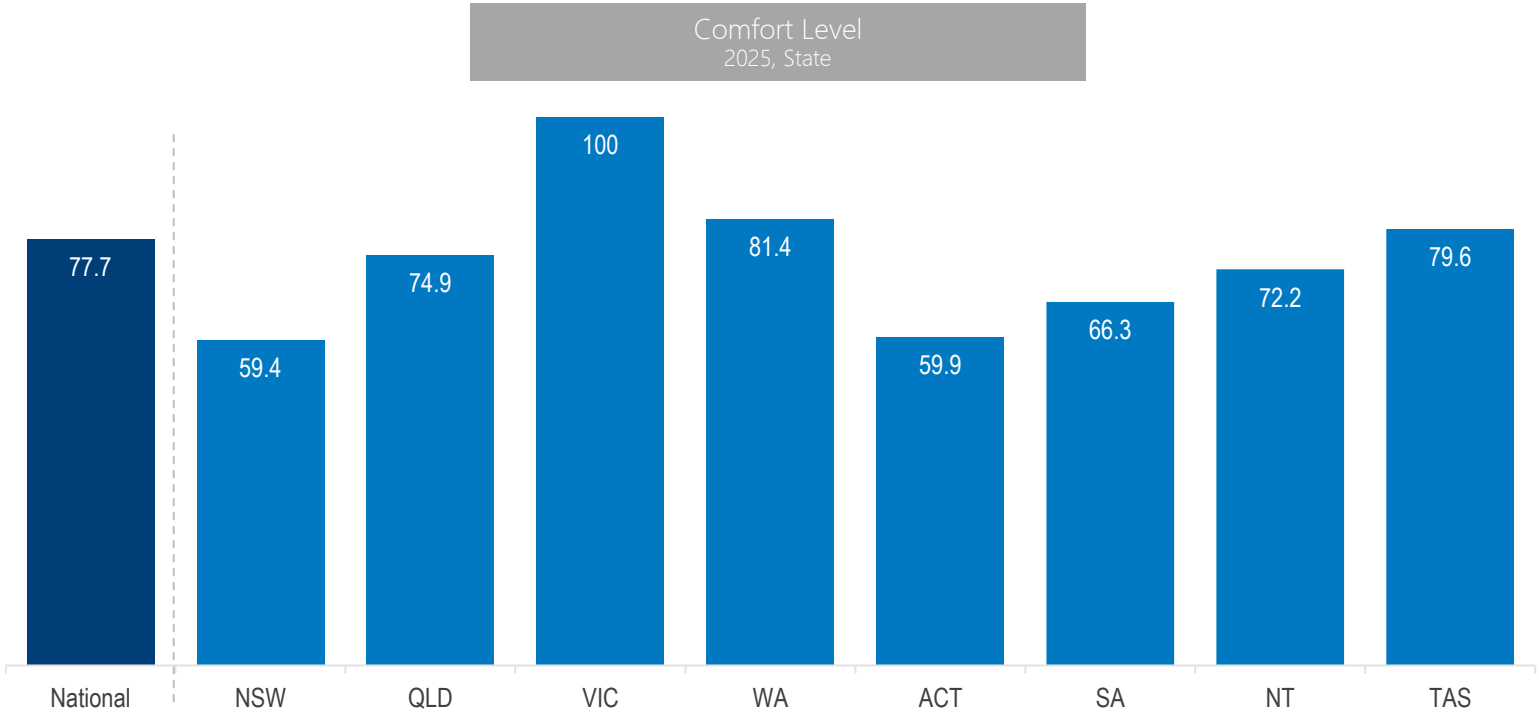
Comfort level using wheelchair / mobility scooter
(state)



Q53. How comfortable are you when walking, riding your bike, or using your wheelchair or mobility scooter in your local area?
Base: Main respondents who used the wheelchair / mobility scooter for at least 10 mins in the last year (n=68)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
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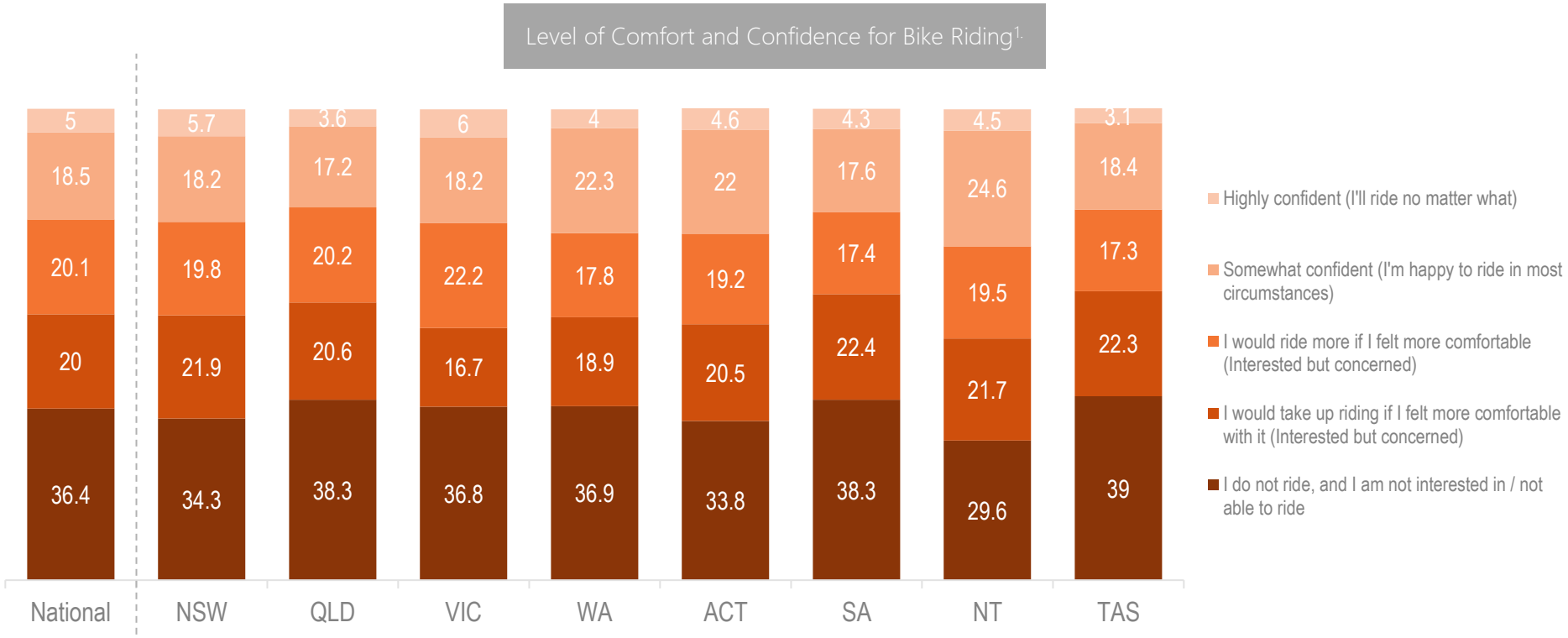
Level of comfort and confidence for cycling – by state

Granular breakdown



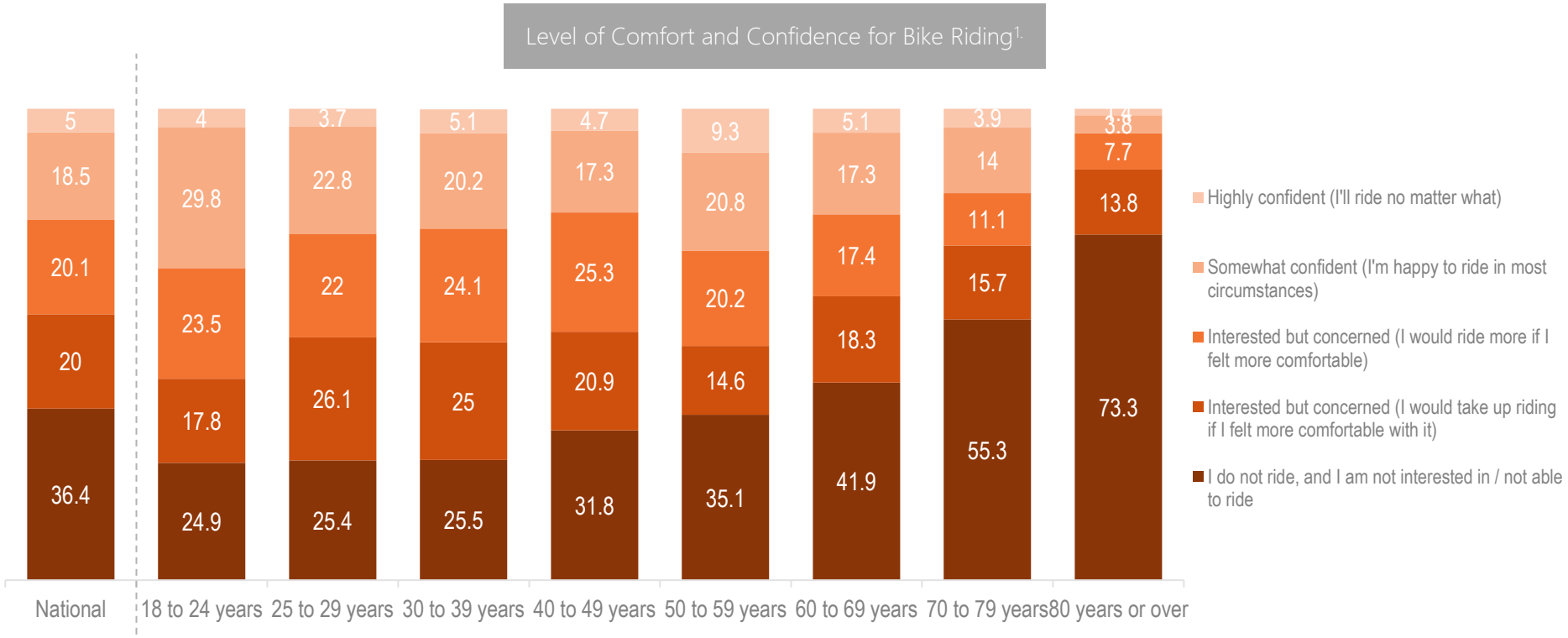
1. Adapted from the Four Types of Cyclist segmentation question (Dill, J., & McNeil, N. (2016). Revisiting the four types of cyclists: findings from a national survey. Transportation research record, 2587(1), 90-99. https://doi.org/10.3141/2587-11).

Q51. What phrase describes your attitude towards bicycle cycling?
Base: All main respondent (n=4,796)

- *Values shown in the charts are percentages (%), unless otherwise indicated.*
- *Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions.*

Level of comfort and confidence for cycling – by age

Granular breakdown



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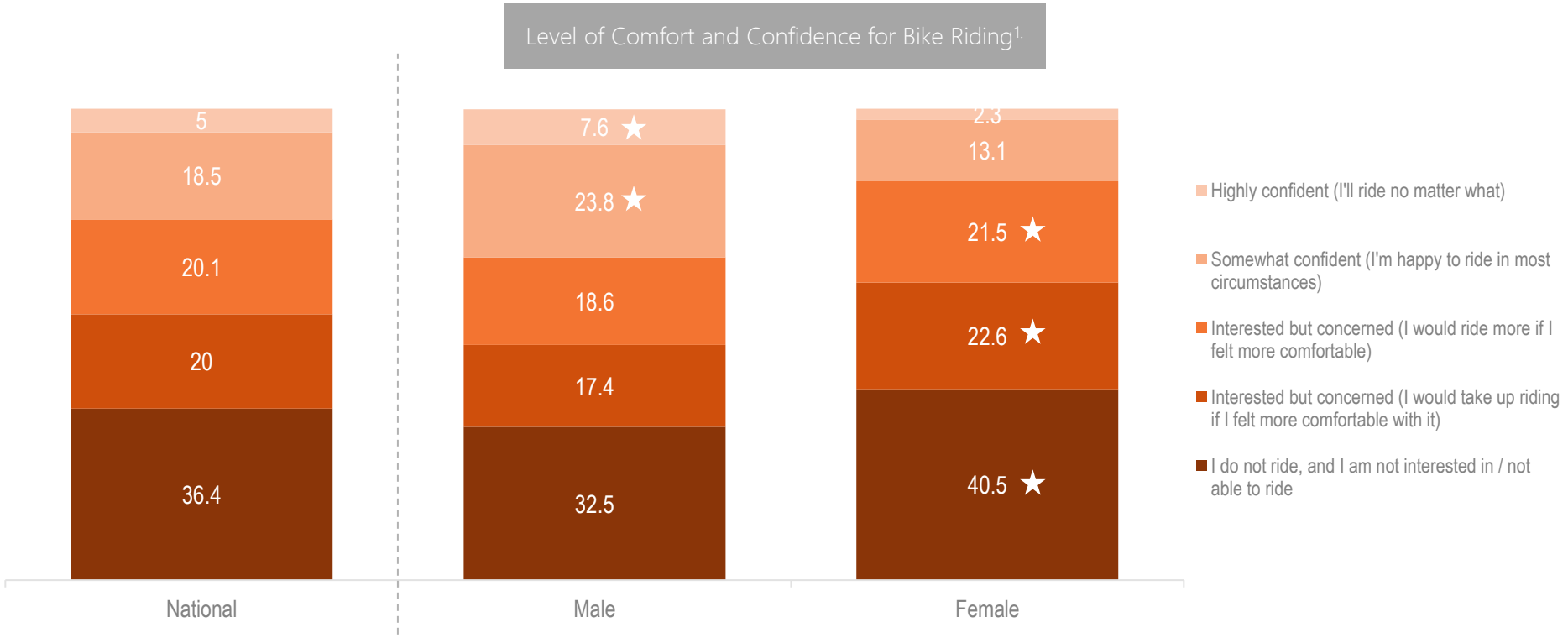
Level of comfort and confidence for cycling – by gender

Granular breakdown



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CWANZ
CYCLING AND WALKING
AUSTRALIA AND NEW ZEALAND

Appendix 2 – Data Tables

Walking participation rate in the past week by state and territory

Region	%
Australia	80.6
NSW	82.0
QLD	77.9
VIC	82.7
WA	77.6
ACT	80.1
SA	80.7
NT	68.4
TAS	81.2

Cycling participation by state and territory

		Region								
Year	Period	Aus	NSW	QLD	VIC	WA	ACT	SA	NT	TAS
2015	Week	14.9	8.4	16.4	16.8	23.3	21.5	16.8	24.6	18.1
	Month	21.8	15.3	22.6	23.6	32.3	30.2	23.3	33.3	24.2
	Year	34	27.9	34.2	36.4	43.9	44.9	33.3	47.1	35.4
2017	Week	15.7	12.7	16.3	17.1	18.7	26.2	14.2	26.3	16.3
	Month	22.2	18.1	24	23.9	25.1	33.8	20.1	34.6	24.2
	Year	34.7	29.9	35.6	36.5	42.4	46.9	31.3	47.4	35.4
2019	Week	14	13.1	13.7	14	15.9	22.7	13.2	21.9	15
	Month	21.8	19.9	22.4	23.1	22.6	32.4	18.8	30.1	22.6
	Year	35.6	33.4	36.2	36	41.5	44.5	30.2	44.9	34.9
2021	Week	17.5	14.9	18.1	19.1	20.3	22.3	16.1	21.6	16.4
	Month	26.4	23.6	26.6	28	30.4	29.5	25.2	32.9	24.2
	Year	39.3	35.1	39.8	41.2	45.7	43.8	37.2	48.3	40.1
2023	Week	14.8	14.5	14.4	16.7	13.9	13	12.5	16.1	11.5
	Month	23.7	24	22.9	25.8	22.3	23.9	20.9	25.3	19.2
	Year	36.6	37.8	35	38.2	36.4	38.5	31.1	39.1	31.7
2025	Week	14.9	14.8	14.1	15.7	16.5	20	11.8	17.6	13.8
	Month	24.4	25.1	23.1	24.4	25.9	31.3	21.3	27.5	21.7
	Year	34.8	33.9	32.9	36.6	37.6	40.5	32.8	36.7	31.1

Cycling participation by capital city

		Capital City						
Year	**Period**	**Sydney**	**Melbourne**	**Brisbane**	**Adelaide**	**Perth**	**Darwin**	**Hobart**
2015	Week	0	15.3	16.4	15.6	20.6	22.2	18.4
	Month	8.3	22.3	22.7	22.5	29.6	31.4	25.1
	Year	22	35.2	35.7	32.9	41.6	46.6	34
2017	Week	10.5	17.5	14.2	12.4	17.9	26.9	15.3
	Month	14.5	23.9	22.1	18.4	24.2	34.9	26.2
	Year	25.7	36.8	34.1	31.3	42.5	47.2	38.5
2019	Week	12	12.1	15.1	12.8	12.9	22.5	14
	Month	17.5	21.2	24.2	17.9	18.1	30.2	21.8
	Year	30.6	34.2	35.9	29.2	38.8	45	35
2021	Week	14.4	20.3	17.9	15.8	19.6	20.6	16
	Month	22.7	29.1	27	24.5	29.7	31.8	23.8
	Year	35.2	42.1	39.4	37	45	48.9	41.4
2023	Week	13.3	16.1	13.6	12.5	14.1	15.9	12.1
	Month	20.6	25	22	20.9	22.7	25	19.8
	Year	34.5	38.1	35.1	31.4	36	38.7	32.4
2025	Week	14.2	15.5	14.7	11.3	16.6	19.5	14.8
	Month	24.6	24.9	24.4	22.1	26.1	30.5	25.1
	Year	33.1	37.4	34.1	33.5	37.2	37.3	35.7

Cycling participation by regional area

		Regional Area						
Year	Period	NSW	VIC	QLD	SA	WA	NT	TAS
2015	Week	23.1	21.3	16.5	20.8	31.8	27.7	17.9
	Month	27.5	27.3	22.5	26	40.7	35.9	23.6
	Year	38.4	40.1	32.9	34.8	51	47.7	36.5
2017	Week	16.6	15.9	18.1	20.1	21.1	25.6	17
	Month	24.4	24	25.7	25.8	28	34.1	22.7
	Year	37.2	35.5	36.9	31.3	42	47.7	33.2
2019	Week	15.2	19.8	12.4	14.5	25.6	21.2	15.9
	Month	24.2	29.1	20.7	21.9	37.4	29.9	23.3
	Year	38.3	42	36.5	33.7	50.1	44.8	34.8
2021	Week	15.8	15.3	18.2	16.9	23.2	23.2	16.7
	Month	25.2	24.8	26.2	28	33.2	34.7	24.5
	Year	34.9	38.5	40.3	38	48.3	47.5	39.1
2023	Week	16.8	18.5	15.2	12.7	13	16.4	11
	Month	30.2	28.2	23.8	20.6	20.6	25.6	18.7
	Year	43.7	38.3	34.9	29.9	38.2	39.7	31.1
2025	Week	16	16.2	13.4	13.4	15.8	13.8	13
	Month	26.1	23	21.8	18.4	25.3	21.9	19.2
	Year	35.4	33.8	31.7	30.3	39.2	35.5	27.8

Cycling participation by gender

		Gender	
Year	**Period**	**Male**	**Female**
2015	Week	18.6	11.3
	Month	26.3	17.4
	Year	39.1	29.1
2017	Week	20.7	10.9
	Month	27.7	16.8
	Year	40.2	29.3
2019	Week	17.6	10.6
	Month	26.1	17.6
	Year	39.9	31.4
2021	Week	22.2	12.9
	Month	31.8	21
	Year	45.4	33.3
2023	Week	18.3	11.3
	Month	29.1	18.5
	Year	42.7	30.7
2025	Week	19.3	10.9
	Month	29.7	19.5
	Year	41.1	29

Cycling participation by age

		Age Group				
Year	**Period**	**0-9**	**10-17**	**18-29**	**30-49**	**50+**
2015	Week	40.3	32.8	9.1	10.8	4.3
	Month	53.1	45.3	15.4	17.2	7.3
	Year	60.9	68.6	30.9	32.1	13.1
2017	Week	40.6	33	11.2	10.6	5.6
	Month	51.3	47.7	16.5	17	7.8
	Year	65.2	71.4	31.4	30.4	13.4
2019	Week	34.9	32.7	8.2	9.8	6.6
	Month	51.2	45.9	13	18.4	9.8
	Year	69.7	71.1	25	34.6	16.9
2021	Week	44.1	37.2	7.2	15.7	7.8
	Month	60.2	52.7	14.5	24.8	12.3
	Year	69.8	72.4	28.5	41.8	20.1
2023	Week	37	30.7	7.3	11.8	7.4
	Month	57.1	49.8	14.2	18.9	11.6
	Year	64.9	70	27.9	34.2	21.1
2025	Week	29.3	25.2	8.2	13.8	10.7
	Month	49	38.9	18.3	21.4	16.4
	Year	59.9	52.7	31.9	32.8	23.1

Cycling participation by gender and age

		Age group									
		0-9		10-17		18-29		30-49		50+	
Year	Period	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
2015	Week	43.8	36.6	38.8	26.2	12.5	5.6	14.8	6.9	5.8	2.9
	Month	55.2	51	50.8	39.4	19.2	11.3	22.5	12.2	10.4	4.5
	Year	61.6	60.1	70.6	66.4	34.9	26.6	38.9	25.6	17.7	9
2017	Week	43.5	37.6	49.9	17.1	15.2	6.3	13.4	8	8.8	2.6
	Month	51.9	50.7	63.5	32.8	20.9	11	22.2	12	11.3	4.6
	Year	65.3	65.2	81.9	61.5	34.2	27.9	35.7	25.4	19.2	8.1
2019	Week	35.9	33.8	43	22.8	9.2	7.2	13.3	6.4	9.9	3.6
	Month	50.2	52.3	54.1	37.9	16.3	9.5	23.2	13.7	14.2	5.8
	Year	67.5	71.9	74.5	67.7	28.3	21.5	39	30.2	23	11.5
2021	Week	46.2	41.8	45.4	28.6	10.1	4.2	20.7	10.8	11.8	4.2
	Month	61.1	59.3	62.9	41.8	19.2	9.8	29.7	20.1	17.3	7.7
	Year	68.9	70.8	79.9	64.4	32.9	23.9	48	35.8	27.2	13.6
2023	Week	37.1	36.9	42.8	17.9	7.7	6.9	14.6	9	10.8	4.3
	Month	60.6	53.4	60.1	38.8	16.8	11.7	22.8	15.2	17.1	6.5
	Year	67.8	62	78.3	61.2	32.9	22.9	38.8	29.8	27.7	15.1
2025	Week	32.3	26.4	31.2	19.3	10.7	5.7	17.3	10.4	16	5.9
	Month	50.2	47.7	44	33.3	21.3	15.3	27.3	15.8	22.3	11
	Year	62.7	56.9	58.9	46.1	34.6	29.1	39.9	26.1	30	16.8

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CYCLING AND WALKING
AUSTRALIA AND NEW ZEALAND

Appendix 3 - Questionnaire

CWANZ

National Cycling and Walking Participation Questionnaire

February 2025

SAMPLING INSTRUCTIONS

- Nationally representative sample
- Age, gender captured

PROGRAMMER INSTRUCTIONS

- Ensure mobile compatibility
- All questions mandatory unless otherwise specified
- Allow close and re-enter to survey
- **MR** – multiple response
- **SR** – single response
- **OE** – open ender

INTRODUCTION

Thank you for taking part in this important survey.

This evaluation is being conducted on behalf of Cycling and Walking Australia and New Zealand (CWANZ) and facilitated by Painted Dog Research. Rest assured that your responses will be strictly confidential and protected by the Federal *Privacy Act 1988*. Under no circumstances will any of your personal data be disclosed to any organisation other than Painted Dog Research or be used for any purpose other than this engagement.

No personal identifiable information will be requested in this survey, hence we ask that you provide your honest thoughts and opinions.

By continuing with this survey, you consent to participate in this research.

Please click 'next' to get started.

Please be assured that your responses will be strictly confidential and used for research purposes only. This research is being conducted within the guidelines of The Research Society and the Federal Privacy Act 1988.

If you have difficulties completing the survey or any questions regarding this research and how the findings are used, please contact Calvin at Painted Dog Research on calvin@painteddogresearch.com or phone (08) 6245 5111.

SCREENERS & PROFILING

First, we want to ensure we are speaking to a wide range of people. Please tell us a little bit more about yourself.

Q28. What is your gender? Gender refers to current gender, which may be different to sex recorded at birth and may be different to what is indicated on legal documents. **SR**

Male	1
Female	2
Non-binary	3
Prefer not to say	4
I use a different term (please specify)	98

Q1. What is your age? **SR, RANGE 10-100, START SLIDER AT 15, RECODE INTO AGE BRACKETS BELOW**

17

14 or under	1	**CLOSE**
15-17 years	5	
18-24 years	6	
25-29 years	7	
30-39 years	8	
40-49 years	9	
50-59 years	10	
60-69 years	11	
70-79 years	12	
80+ years	13	

Q2. What is the postcode of your home address? **OE, FORCE 4 DIGITS, ENSURE RESPONDENTS ARE FROM AUSTRALIA POSTCODE, OTHERWISE SCREEN OUT**

Q48. Please confirm which of the below Local Government Areas your home address is within?

INSERT RELEVANT LGA(S)	1
Other (please specify)	97

Q33.How many people usually live in your household? **SR**

1 (only me)	1	**SKIP TO Q4**
2	2	
3	3	
4	4	
5	5	**CONTINUE TO Q33a**
6	6	
7	7	
8	8	
9	9	
10 or more	10	

Q333a. And what is each other household members name (excluding your own)? *The information provided in this question will only be used to help clarify which household member later questions are referring to. No names will be stored in data and all responses will remain absolutely anonymous.* **OE – SHOW APPROPRIATE NUMBER OF TEXT BOXES FOR EACH PARTICIPANT**

Q4. Have you used any of the following modes of transport in the last 7 days? **MR**

Car, as a driver	1
Car, as a passenger	2
Motorcycle or moped	3
Public transport	4
Wheelchair or mobility scooter	5
'Push' bicycle	6
Electric bicycle	7
E-scooter or e-skateboard	8
Walking	9
None of the above	99

WALKING

We'd now like to ask you some questions about walking.

Q6. **IF NOT 5 AT Q4:** In the last 7 days, have you walked for **10 minutes** or more, somewhere **outside of your home**? *This includes walking for exercise or to reach a destination and excludes activities such as gardening or using the treadmill in the gym.*
IF 5 AT Q4: In the last 7 days, have you walked or used your wheelchair or mobility scooter for **10 minutes** or more, somewhere **outside of your home**? *This includes walking for exercise or to reach a destination and excludes activities such as gardening or using the treadmill in the gym.* **SR**

Yes	1	**SKIP TO Q9**
No	2	**ASK Q7**

ASK Q7 IF CODE 2 (NO) @ Q6
Q7. **IF NOT 5 AT Q4:** What are the reasons to why you did not walk at least once for 10 minutes or more in the last 7 days?
IF 5 AT Q4: What are the reasons to why you did not walk or use your wheelchair or mobility scooter at least once for 10 minutes or more in the last 7 days? **MR RANDOMISE**

Health reasons	1	
I am physically unable to	10	
Too busy	2	
Prefer other methods of getting around	3	
Had no need	4	
Takes too long	5	
No footpaths or paths to walk on	6	
Bad weather	8	
I don't feel safe walking	9	
Other (please specify):	97	
No reason	99	**EXCLUSIVE**

ASK Q8 IF CODE 2 (NO) @ Q6
Q8. **IF NOT 5 AT Q4:** When did you last walk for at least 10 minutes?
IF 5 AT Q4: When did you last walk / use your wheelchair or mobility scooter for at least 10 minutes? **SR**

In the last 2 weeks	1	**GO TO Q11**
In the last 3 weeks	2	**GO TO Q11**
In the last 4 weeks	3	**GO TO Q11**
More than a month ago	4	**GO TO Q12**
More than a year ago	5	**GO TO Q14/Q16**

ASK Q9 IF CODE 1 (YES) @ Q6
Q9. **IF NOT 5 AT Q4:** In the last 7 days, how many days did you walk for at least 10 minutes?
IF 5 AT Q4: In the last 7 days, how many days did you walk or use your wheelchair or mobility scooter for at least 10 minutes? **SR**

1 day	1
2 days	2
3 days	3
4 days	4
5 days	5
6 days	6
7 days	7

ASK Q9a IF ONLINE RESPONDENT AND CODE 1 (YES) @ Q6
Q9a.
IF NOT 5 @ Q4: In the last 7 days, overall, how many times did you walk for?
IF 5 @ Q4: In the last 7 days, overall, how many times did you walk or use your wheelchair or mobility scooter for?

	Once only	2-3 times	4-5 times	6-10 times	More than 10 times	Not at all
10-19 mins	1	2	3	4	5	99
20-29 mins	1	2	3	4	5	99
30 mins or more	1	2	3	4	5	99

ASK Q10 IF CODE 1 (YES) @ Q6
Q10. **IF NOT 5 AT Q4:** What is your best estimate of the total time you have spent walking over the past 7 days? **DROPDOWN**
IF 5 AT Q4: What is your best estimate of the total time you have spent walking or using your wheelchair or mobility scooter over the past 7 days? **DROPDOWN**

_____ hours _____ minutes

ASK Q11 IF CODE 1 @ Q6 OR CODE 1/2/3 @ Q8 (WALKED IN PAST 4 WEEKS)

Q11. **IF NOT 5 AT Q4:** During the past 4 weeks, have you walked for at least 10 minutes for any of the following purposes?
IF 5 AT Q4: During the past 4 weeks, have you walked or used your wheelchair or mobility scooter for at least 10 minutes for any of the following purposes? **MR**

Recreation or exercise	1
Walking the dog	2
Commute to or from work	3
Commute to or from school, university or study	4
Commute to or from shopping	5
To visit a café or restaurant	6
As part of a trip involving public transport	7
As part of the normal duties of my job (e.g., making deliveries, site visits, attending meetings)	8
Escorting someone, such as walking a child to school	9
To visit friends or relatives	10
To run an errand or complete other personal business (e.g. an appointment)	11
Other (please specify):	97

ASK Q55 IF CODE 1 @ Q6 OR CODE 1/2/3 @ Q8 (WALKED IN PAST 4 WEEKS)

Q55. **IF NOT CODE 5 @ Q4:** What are the reasons you choose to walk? **MR**
IF CODE 5 @ Q4: What are the reasons you choose to use your wheelchair or mobility scooter? **MR**

Convenience	1
To get somewhere	2
Physical health and wellbeing	3
Mental health and wellbeing	4
Enjoy spending time outdoors (e.g. get some fresh air)	5
It's relaxing and enjoyable	6
Socialise with family and friends	7
Good for the environment	8
Walk the dog	9
No alternative	10
Save money	11
Other (please specify)	97
Don't know	98

ASK Q12 IF CODE 1 @ Q6 OR CODE 1-4 @ Q8

Q12. **IF NOT 5 AT Q4:** And how much more or less frequent would you say that you are walking now compared to a year ago?
IF 5 AT Q4: And how much more or less frequent would you say that you are walking or using your wheelchair or mobility scooter now compared to a year ago? **SR**

More frequently than a year ago	1
Just as frequent as a year ago	2
Less frequently than a year ago	3

ASK Q13a IF ONLINE RESPONDENT

Q13a. **IF NOT 5 AT Q4:** Thinking about walking, what might help you do it more? **MR**
IF 5 AT Q4: Thinking about walking, using your mobility scooter or wheelchair, what might help you do any of these activities more? **MR**

Motivation	1
Having the time	2
Easier to commute to work	3
Dedicated walking or riding to school routes	9
More people to walk with in my neighbourhood	11
A free journey planning 'app' that I can use to plan my walking trips, and which can tell me the route that is flattest, fastest or most traffic free	12
More information about walking paths in my local area	13
Better paths, facilities and on-road safety features	14
A higher cost of parking at my destination	18
Availability of end of trip facilities at my destination (e.g. change rooms, showers, lockers, secure storage etc.)	19
More shade / protection from the weather	20
More opportunities to work from home	21
Something else (please specify):	97
Nothing	99

CYCLING

Now we would like to ask you some questions about bike riding. For the purposes of this survey, the term 'bicycle' refers to both electric and 'push' bicycles.

ASK Q14 IF NOT CODE 6 OR 7 @ Q4 (DID NOT USE BICYCLE IN LAST 7 DAYS)

Q14. When did you last ride a bicycle? **SR**

In the last 2 weeks	1
In the last 3 weeks	2
In the last 4 weeks	3
More than a month ago	4
More than a year ago	5
I've never ridden a bicycle	6

ASK Q15 IF CODE 5 OR 6 @ Q14

Q15. Are there any reasons you have not ridden a bicycle in the past year? **MR**

Health reasons	1
I am physically unable to	10
Too busy to ride	2
Prefer other methods of getting around	3
Had no need	4
Takes too long	5
Bad weather	8
I'm not interested in riding	6
I don't know how to ride a bicycle	7
I don't own a bicycle	9
I feel unsafe riding in traffic	11
Too hilly	12
Other (please specify):	97
No reason	99

ASK Q16, Q16a AND Q17 IF CODE 6 OR 7 @ Q4 (USED BICYCLE IN LAST 7 DAYS)
Q16. In the last 7 days, on how many days did you ride a bicycle? **OE NUMERIC**

1 day	1
2 days	2
3 days	3
4 days	4
5 days	5
6 days	6
7 days	7
Don't know	99

ASK Q16a IF ONLINE RESPONDENT
Q16a. In the last 7 days, overall, how many times did you ride a bike for?

	Once only	2-3 times	4-5 times	6-10 times	11-20 times	More than 20 times	Not at all
5-9 mins	1	2	3	4	5	6	99
10-19 mins	1	2	3	4	5	6	99
20-29 mins	1	2	3	4	5	6	99
30-59 mins	1	2	3	4	5	6	99
60 mins or more	1	2	3	4	5	6	99

Q17. What is your best estimate of the total time you have spent riding over the last 7 days? **DROPDOWN**

Hours minutes

ASK Error! Reference source not found. **IF CODE 6 OR 7 @ Q4 (RODE IN PAST 7 DAYS) OR CODE 1-4 @** Error! Reference source not found. **(RODE WITHIN PAST YEAR)**
Q18. **IF CODE 6 OR 7 @ Q4:** For what purposes did you ride over the last 7 days?
IF CODE 1-4 @ Q14: For what purposes did you ride [insert response **@ Error! Reference source not found.**]?

For recreation or exercise	1
To cycle to or from work	3
To cycle to or from school, university or study	4
To cycle to or from shopping	5
To visit a café or restaurant	6
As part of a trip involving public transport	7
As part of the normal duties of my job (e.g., making deliveries, site visits, attending meetings)	8
Escorting someone, such as riding a child to school	9
To visit family, friends or relatives	10
To run errands or other personal business (e.g. an appointment)	11
Other (please specify):	97

ASK Q19 IF CODE 6 OR 7 @ Q4 OR CODE 1-4 @ Q14
Q19. Which of the following statements best describes you? **SR**

I am new to cycling and started cycling in the last 12 months	1
I have started to cycle again after a break of 12 months or more	2
I have been cycling for more than 12 months	3

ASK Q19A IF CODE 3 @ Q19
Q19a. And how would you describe your frequency of cycling compared to a year ago? **SR**

More frequently than a year ago	1
Just as frequent as a year ago	2
Less frequently than a year ago	3

ASK Q13b IF ONLINE RESPONDENT AND (CODE 6 OR 7 @ Q4 (RODE IN PAST 7 DAYS) OR CODE 1-4 @ Error! Reference source not found. **(RODE WITHIN PAST YEAR))**
Q13b. Thinking about riding your bike, what might help you do it more? **MR**

Motivation	1
Having the time	2
An easier to commute to work	3
More accessible paths for all ages and abilities	4
Bike racks on busses	5
Bike repair stations along the bike paths	6
Knowing how to maintain my bike better	7
Feeling more confident to ride my bike wherever I need to go	8
Bike skills training	10
A free journey planning 'app' that I can use to plan my bike trips, and which can tell me the route that is flattest, fastest or most traffic free	12
More information about biking paths in my local area	13
Better paths, facilities and on-road safety features	14
Somewhere secure to park or store my bike at the places that I want to go	15
Having a bike that suits my needs (e.g. comfortable, a basket to carry my things, in good working order)	16
An e-bike incentive scheme (e.g. financial incentives, free trials etc.)	17
A higher cost of parking at my destination	18
Availability of end of trip facilities at my destination (e.g. change rooms, showers, lockers, secure storage etc.)	19
More opportunities to work from home	20
Something else (please specify):	97
Nothing	99

ASK Q13c IF SELECTED CODE 14 @ Q13b
Q13c. You mentioned that better paths, facilities, and on-road safety features would make you more likely to ride your bike. What specifically do you think would make you more likely to ride your bike more?

More off-road shared paths	1
More on-road bicycle lanes	2
Better connections between bike paths and local destinations (shops, gyms, parks, schools, etc).	3
Better connections between bike paths and public transport	4
More signs highlighting bicycle routes	5
Other (please specify)	97

Q51.What phrase best describes your attitude towards bicycle riding?

I'll ride no matter what	1
I'm happy to ride in most circumstances	2
I would ride more if I felt more comfortable	3
I would take up riding if I felt more comfortable with it	5

I do not ride, and I am not interested in/able to ride	4

ASK Q21 IF CODE 6 OR 7 @ Q4 OR CODES 1-4 @ Q14 (RIDDEN A BIKE IN THE LAST YEAR)

Q21. We would now like you to think about the way you ride your bike in the presence of traffic when on-road. Which of the following best describes your riding style? **SR**

I prefer paths or quiet streets and am willing to take a longer way to avoid busy roads	1
I prefer to use the most direct and convenient way regardless of traffic	2
I would never ride my bike on a road	3

ASK Q22 IF CODE 6 OR 7 @ Q4 OR CODES 1-4 @ Q14 (RIDDEN A BIKE IN THE LAST YEAR)

Q22. Which of the following phrases best describes you as a bike rider? **SR**

Assertive regular rider	1
Cautious regular rider	2
Confident occasional rider	3
New or returning to riding	4

ASK Q24 IF CODE 6 OR 7 @ Q4 OR CODES 1-4 @ Q14 (RIDDEN A BIKE IN THE LAST YEAR) Error! Reference source not found.

Q24. In the past year, do you think that cycling conditions in your local area have become better or worse? **SR**

Much better	1
Better	2
About the same	3
Worse	4
Much worse	5
Don't know	97

ASK Q26 IF ONLINE RESPONDENT

Q26.There are a number of actions your local area could take to encourage bike riding in the area. Please rate how much of a priority are each of the following actions.**SR PER ROW**

		Not a priority	Low priority	Moderate priority	High priority	Very high priority	Unsure
1	More off-road shared paths and cycleways	5	4	3	2	1	6
2	More on-road bicycle lanes	5	4	3	2	1	6
3	Better connections between bike paths and schools	5	4	3	2	1	6
4	Better connections between bike paths and shops	5	4	3	2	1	6
5	Better connections between bike paths and parks and swimming pools, gyms, etc.	5	4	3	2	1	6
6	Better connections between bike paths and public transport	5	4	3	2	1	6
7	More bicycle parking	5	4	3	2	1	6
8	Lower local road speed limits	5	4	3	2	1	6
9	More bike skills training	5	4	3	2	1	6
10	More signs highlighting bicycle routes	5	4	3	2	1	6
11	More events or campaigns that promote bike riding	5	4	3	2	1	6

COMBINED SECTION

Q53. How comfortable are you when doing the following in your local area? **SR**

	Very uncomfortable	Uncomfortable	Neither comfortable nor uncomfortable	Comfortable	Very comfortable	Not sure / Don't know
SHOW IF CODE 1-4 @ Q8 OR CODE 1 @ Q6: Walking	1	2	3	4	5	97
SHOW IF CODE 6-7 @ Q4 OR CODE 1-4 @ Q14: Cycling	1	2	3	4	5	97
SHOW IF CODE 5 @ Q4: Using my wheelchair / mobility scooter	1	2	3	4	5	97

Q27.Do you have any suggestions for actions you would like to see your local council take to encourage walking and bike riding in the local area? **OE**

□ No I don't have any suggestions

MAIN RESPONDENT DEMOGRAPHICS

Q29. Which of the following applies to you? **MR**

Student – Full time	1
Student – Part time	2
Employed – Full time	3
Employed – Part time, casual, or unpaid voluntary	4
Unemployed and looking for work	7
Home duties	8
Pensioner – not retirement age	9
Retired	10
Other (please specify):	97
Prefer not to say	99

OTHER HOUSEHOLD MEMBERS TRAVEL

ASK SECTION IF AT LEAST 2 MEMBERS IN THE HOUSEHOLD AT Q31. Q31 - Q45 TO BE REPEATED FOR EACH HOUSEHOLD MEMBER

SHOW BEFORE FIRST OTHER HOUSEHOLD MEMBER LOOP: To build an accurate representation of travel habits of members in households in Australia, now we'd like to ask about other people in your household, starting with **FIRST NAME PROVIDED AT Q33a**.

SHOW BEFORE 2ND TO 3RD OTHER HOUSEHOLD MEMBER LOOP: Now we'd like to ask the same questions about **NEXT NAME PROVIDED AT Q33a**.

SHOW BEFORE 4TH OR LATER OTHER HOUSEHOLD MEMBER LOOP: We understand your time is valuable and appreciate your input already provided in this valuable research, so if you would prefer to finish the survey now, we understand. If you're happy to continue however, we'd like to ask the same questions about **NEXT NAME PROVIDED AT Q33a** now.

Opt in.

Yes I'm happy to continue	1
No, I'd like to finish the survey now	2

Q31. What gender do they identify as? Gender refers to current gender, which may be different to sex recorded at birth and may be different to what is indicated on legal documents. **SR**

Male	1
Female	2
Non-binary	3
Prefer not to say	4
I use a different term (please specify)	98

Q32. What is their age? **SR, RANGE 10-100, START SLIDER AT 15, RECODE INTO SAME AGE BRACKETS AS Q1**

Prefer not to say	99

PROGRAMMER NOTE: IF CODE 99 @ Q32, CONTINUE SURVEY WITH 'AGE 2+' LOGIC

Q35. Which of the following categories apply to this individual at the moment? **MR**

Student – Full time	1
Student – Part time	2
Employed – Full time	3
Employed – Part time, casual, or unpaid voluntary	4
Unemployed and looking for work	7
Home duties	8
Pensioner – not retirement age	9
Retired	10
Not working	11
too young for school	12
Other (please specify):	97
Prefer not to say	99

Q37. In the last 7 days, has this person used or done any of the following? **MR**

Car, as a driver	1
Car, as a passenger	2
Motorcycle or moped	3
Public transport	4
Wheelchair or mobility scooter	5
'Push' bicycle	6
Electric bicycle	7
E-scooter or e-skateboard	8
Walking	9
None of the above	99

OTHER HOUSEHOLD MEMBER: WALKING

ASK SECTION IF NOT CODE 2 @ Q32 (2+ YEARS OLD)

Q39. In the last 7 days, has this person walked anywhere for 10 minutes or more somewhere outside of their home? **SR**

This includes walking for exercise or to reach a destination like a shop, school, workplace or someone's house, or they may have walked to or from public transport or from a car park to a destination.

Yes	1
No	2
Don't know	97

ASK Q40 IF CODE 2 @ Q39

Q40. When did they last walk for at least 10 minutes? **SR**

In the last 2 weeks	1
In the last 3 weeks	2
In the last 4 weeks	3
More than a month ago	4
More than a year ago	5
Don't know	97

ASK Q58 IF CODE 1 @ Q39 (WALKED IN THE LAST 7 DAYS) OR CODE 1-3 @ Q40 (WALKED WITHIN THE PAST 4 WEEKS) OR CODE 5 @ Q37 (USED A WHEELCHAIR / MOBILITY SCOOTER IN THE LAST 7 DAYS)

Q58.

IF NOT CODE 5 @ Q37: During the past 4 weeks, has this person walked for at least 10 minutes for any of the following purposes? **MR**

IF CODE 5 @ Q37: During the past 4 weeks, has this person walked or used their wheelchair or mobility scooter for at least 10 minutes for any of the following purposes? **MR**

Recreation or exercise	1
Walking the dog	2
Commute to or from work	3
Commute to or from school, university or study	4
Commute to or from shopping	5
To visit a café or restaurant	6
As part of a trip involving public transport	7
As part of the normal duties of my job (e.g., making deliveries, site visits, attending meetings)	8
Escorting someone, such as walking a child to school	9
To visit friends or relatives	10
To run an errand or complete other personal business (e.g. an appointment)	11
Other (please specify):	97

OTHER HOUSEHOLD MEMBER: CYCLING

ASK Q41 Error! Reference source not found. **IF NOT CODE 6 OR 7 @ Q37 (NOT RIDE IN THE LAST 7 DAYS) AND @ Q32 (2+ YEARS OLD)**

Q41. When did this person last ride a bicycle? **SR**

In the last 2 weeks	1
In the last 3 weeks	2
In the last 4 weeks	3
More than a month ago	4
More than a year ago	5
Never	6
Don't know	97

ASK Error! Reference source not found. **IF CODE 6 OR 7 @ Q37 (RODE IN THE LAST 7 DAYS)**

Q42. In the last 7 days, on how many days did they ride a bicycle?

1 day	1
2 days	2
3 days	3
4 days	4
5 days	5
6 days	6
7 days	7
Don't know	99

ASK Q43 IF CODE 6 OR 7 @ Q37 (RODE IN THE LAST 7 DAYS)

Q43. What is your best estimate of the total time they have spent riding over the past 7 days? **DROPDOWN**

[ ] hours [ ] minutes

ASK Q46 IF CODE 6 OR 7 @ Q37 (RODE IN THE LAST 7 DAYS) OR CODE 1-3 @ Q41 (RODE WITHIN THE PAST 4 WEEKS)

Q45. **IF CODE 6 OR 7 @ Q37**: For what purposes did they ride over the last 7 days? **MR, RANDOMISE**
IF CODE 1-3 @ Q41: For what purposes did they ride [**INSERT RESPONSE IN Q41**]? **MR, RANDOMISE**

For recreation or exercise	1
To cycle to or from work	3
To cycle to or from school, university or study	4
To cycle to or from shopping	5
To visit a café or restaurant	6
As part of a trip involving public transport	7
As part of the normal duties of my job (e.g., making deliveries, site visits, attending meetings)	8
Escorting someone, such as riding a child to school	9
To visit family, friends or relatives	10
To run errands or other personal business (e.g. an appointment)	11
Other (please specify):	97

PROGRAMMER NOTE: REPEAT Q31 TO Q46 FOR EACH HOUSEHOLD MEMBER AS PER Q33

FINAL QUESTIONS

Q52. Do you currently have access to a bike, e-bike, or any form of e-rideables? ***MR***

Yes – bike	1	
Yes – e-bike	2	
Yes – e-rideable	3	
None of the above – I do not have access to a bike, e-bike or any form of e-rideable	99	**EXCLUSIVE**
Don't know / unsure	97	**EXCLUSIVE**

Q46. How many bicycles, e-bikes and e-rideables in working order are in your household? **OE NUMERIC**

Bicycle ☐

e-bikes ☐

e-rideable ☐

ASK ALL

Q56. To what extent do you support or oppose lowering of vehicle speed limits from the current 40km/hr limit to 30km/hr **in school zones? SR**

Strongly Oppose					**Neither support nor oppose**					**Strongly Support**
0	1	2	3	4	5	6	7	8	9	10

OUTRO

Thanks for your time in completing this survey! Painted Dog Research and Cycling and Walking Australia and New Zealand (CWANZ) appreciate the time you've taken to help us with this important research.

To submit your responses, please click the continue button below.

This market research has been carried out in compliance with the Privacy Act 1988 and the information you provided will be used only for research purposes. If you have any queries, please contact calvin@painteddogresearch.com

END

E-RIDEABLES

ASK THIS SECTION TO ONLINE ONLY

Q100. We'd like you to think about e-rideables like e-scooters and e-skateboards. To what extent do you agree with each of the following statements?

	Strongly Disagree					**Neither agree nor disagree**					**Strongly Agree**	**Not sure**
E-Scooters and pedestrians can safely share footpaths	0	1	2	3	4	5	6	7	8	9	10	97
E-scooters are hazardous to use	0	1	2	3	4	5	6	7	8	9	10	97
E-scooters give people more ability to travel around in cities	0	1	2	3	4	5	6	7	8	9	10	97
E-scooters give people more ability to travel around in regional areas	0	1	2	3	4	5	6	7	8	9	10	97
E-scooter riders often go too fast	0	1	2	3	4	5	6	7	8	9	10	97
E-scooter lithium-ion batteries are a concern to me	0	1	2	3	4	5	6	7	8	9	10	97
I would consider using e-scooter ride-share schemes (e.g., Beam or Neuron)	0	1	2	3	4	5	6	7	8	9	10	97

ASK Q101 IF CODE 8 @ Q4

Q101. In the last 7 days, how many days did you ride on an e-scooter or e-skateboard? **SR**

1 day	1
2 days	2
3 days	3
4 days	4
5 days	5
6 days	6
7 days	7
I did not ridden on any in the last 7 days	99

ASK Q102 IF CODE 8 @ Q4

Q102. For what purposes have you ridden an e-scooter in the past 7 days? **MR**

Recreation or exercise	1
Walking the dog	2
Commute to or from work	3
Commute to or from school, university or study	4
Commute to or from shopping	5
To visit a café or restaurant	6
As part of a trip involving public transport	7
As part of the normal duties of my job (e.g., making deliveries, site visits, attending meetings)	8
Escorting someone, such as walking a child to school	9
To visit friends or relatives	10
To run an errand or complete other personal business (e.g., an appointment)	11
Other (please specify)	97

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CYCLING AND WALKING
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Appendix 3 – Other notes

New Question on Attitudes to Bicycle Riding (2025)

A new question *"What phrase best describes your attitude towards bicycle cycling?"* was included in the 2025 iteration of the survey. This question draws on the widely recognised "Four Types of Cyclists" typology developed by Geller (2006) and further validated by Dill and McNeil (2013, 2016). The typologies help classify population attitudes and comfort levels with cycling as follows:

- **Strong and Fearless** - *I'll ride no matter what*
- **Enthused and Confident** - *I'm happy to ride in most circumstances*
- **Interested but Concerned** - *I would ride more if I felt more comfortable*
- **Interested but Concerned** - *I would take up riding if I felt more comfortable*
- **No Way No How** - *I would not ride and I'm not interested / able to ride*

Unlike previous research which applied a researcher-coded classification based on trip behaviour, the 2025 survey used a respondent self-categorisation approach. This method aligns with refinements tested by the WA Department of Transport between 2020 and 2023 (unpublished), drawing on the work of Hosford et al. (2020). The WA DoT found that this self-ascribed method was easier for respondents to interpret, generated more consistent responses across repeated surveys, and enhanced the practical application of results in transport planning.

A key advantage of this approach is its ability to better estimate the proportion of the population open to increased cycling, particularly those in the "Interested but Concerned" group. An additional sub-question was asked of this group to distinguish between:

- **New potential riders** – those who are not currently riding but would if conditions improved, and
- **Existing riders** – those who ride but would do so more if they felt more comfortable.

This differentiation is important for forecasting demand, prioritising infrastructure investment, and quantifying potential mode shift benefits.

References

i. Geller, R. (2006). *Four Types of Cyclists*. Portland Bureau of Transportation. Retrieved May 2023: link

ii. Dill, J., & McNeil, N. (2016). *Revisiting the four types of cyclists: findings from a national survey.* Transportation Research Record, 2587(1), 90–99.

iii. Hosford, K., et al. (2020). *Are they really interested but concerned? A mixed methods exploration of the Geller bicyclist typology.* ScienceDirect.