

**TRACK OF CYCLING AND
WALKING BEHAVIOUR
AND ATTITUDES**

A RESEARCH REPORT

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APPENDIX A: QUESTIONNAIRE

1 Background to the research

The Department of Planning and Infrastructure (DPI) serves the Western Australian community through a wide-reaching range of activities that involve policy, planning and service delivery of transport and land use. An integral aspect of the department's goal to improve the quality of life for Western Australian's involves encouraging an environmentally friendly transport future.

To meet the stated objectives, DPI has established annual campaigns and initiatives that *intend to increase* the uptake and occurrence of **cycling** and **walking** within Western Australia. In recent years, the campaign has largely involved:

- events, including "Bike Week" and "Ride to Work";
- brochures and materials; and
- limited advertising on radio and in newspapers.

Through programs such as "**Cycle Instead**" and the Perth Bicycle program, DPI has organised more than 80 community cycling events and rolled-out \$8 million of cycling infrastructure projects in 2003-04.

The department is also a major sponsor of '**Walk There Today to Find Thirty**' - a week of walking events', a program that, in collaboration with the Department of Health, encourages Western Australians to improve their health by walking and to continue the habit.

To monitor the effectiveness of these campaigns and initiatives, the department commenced a tracking survey in 1999. The survey examines changes in behaviour, attitudes and intentions in respect to cycling and cyclists. The scope of the survey has been extended in the previous two years, to included questions relating to walking intention and behaviour, especially in relation to substituting driving journeys for walking.

1.1. Research objectives

The primary objectives of the research are:

- to monitor any **changes in cycling behaviours and attitudes** across the waves of research; and
- to monitor and identify any changes in **walking behaviours and attitudes**.

Secondary objectives are to:

- **provide quantitative data** to support continued funding for programs such as the "Cycle Instead" and "Walk There Today" campaigns; and
- assist the DPI to **identify any additional strategies** that may assist the achievement of program goals.

A range of more specific information objectives relating to each major aspect of the research is presented below.

Cycling objectives

- Objective 1: To record the **proportion** of respondents who personally **own a bicycle** and/or have access to one owned by another member of their household.
- Objective 2: To record the **types and condition of bicycles** in the household (among owners).
- Objective 3: To measure **how many** respondents have **undertaken cycling** in the past six months.
- Objective 4: To record the **frequency, time, distance and purpose** of cycling trips undertaken.
- Objective 5: To understand the **level of change in cycling frequency** over the past six months and any **intended change** in the coming six months.
- Objective 6: To measure the **intention to purchase** a bicycle by current non-owners.
- Objective 7: To examine the **reasons why non-users have not cycled** and to gauge their intention to commence cycling in the future.
- Objective 8: To examine **incentives for current non-users** to take up cycling, both personal and structural aspects.
- Objective 9: To assess general **attitudes towards cycling and cyclists**.

Walking objectives

- Objective 10: To record the proportion of respondents who have **substituted a car journey by walking** in the last month.
- Objective 11: To record the **frequency, distance, time and destinations** of walking journeys undertaken.
- Objective 12: To record the **reasons why respondents walk**.
- Objective 13: To record the **reasons why respondents do not walk**.
- Objective 14: To examine the **incentives** that might **encourage people to walk more** in the near future.
- Objective 17: To assess general **attitudes towards walking**.

Campaign objectives

- Objective 15: To record the proportion of respondents who are **aware of the campaign**.
- Objective 16: To identify where respondents had **heard about the campaign**.

Since 2003, TNS Social Research has used segmentation analysis to assist in the interpretation of the results for cycling behaviour. To allow analysis of walking behaviour via segmentation analysis, a question measuring attitudes towards walking as a suitable alternative to short car journeys was introduced in 2005 (Objective 17).

2 Methodology

Similar to previous tracking conducted in 2003 and 2004, the survey was in field in **April** via Computer Assisted Telephone Interviewing (CATI). Until October 2002, the survey was conducted biannually in March and October. Since then the survey has been conducted annually in April.

2.1. Sample characteristics

A total of **403 interviews** were completed. Sampling was random and gender quotas were imposed. Potential respondents were contacted via random telephone number dialling which ensured a representative sample across the Perth metropolitan population.

Within each household, the “next birthday” method was used to select a potential survey respondent. If that person was not available on first contact, up to two callbacks were made before substituting with another respondent. Calls were made during weekdays, weeknights and weekends to maximise the representativeness of the sample.

The average interview duration was 9.6 minutes. All fieldwork was undertaken by TNS CATI fieldwork team.

Sample characteristics for the past three years are displayed in Table 2.1

Table 2.1 Sample Characteristics

	April 2003 n=400	April 2004 n=400	April 2005 n=403
Age	%	%	%
18-24 years	11	10	11
25-34 years	18	16	18
35-54 years	40	42	40
55 years	31	32	31
Gender			
Male	50	50	50
Female	50	50	50
Bicycle Ownership			
Bicycle owner	52	50	50
Do not own bicycle	48	50	50
Walkers / Cyclists			
Walker (substitutes) ¹	n/a	63	70
Cyclist ²	35	29	30

¹ A ‘walker’ is defined as a person who has substituted a short car trip by walking in the last month.

² A ‘cyclist’ is defined as a person who has cycled in the last 6 months.

2.2. Questionnaire

In order to retain the comparability to previous research conducted in 2003 and 2004, the structure of the questionnaire remained largely the same.

Several additional questions designed to capture the attitudes towards walking were included in 2005 (Q27a/b). Questions relating to walking were first included in the questionnaire in 2004, and were modelled on existing cycling questions to ensure internal consistency within the questionnaire.

The cycling and walking behaviour of children to their place of education was also included in the questionnaire, as this was identified as an important target group for future communications and the 2005 results would provide a baseline measure.

A copy of the questionnaire can be found in Appendix A.

2.3. Data analysis

The analysis includes the following subgroup comparisons:

- Age: 18-24 years, 25-34 years, 35-55 years, 55+years
- Gender: male versus female
- Bicycle ownership: own a bicycle versus do not own a bicycle
- Campaign awareness: exposure to the campaign (ie 'Cycle Instead', 'Travel Smart' 'BikeWest' versus no exposure to the campaign)
- Cycling segmentation: 'Positive Conformists', 'Immediate Potentials', 'Positive Persuadables', 'Forced Behaviour' and 'Concept Rejectors'.
- Walking segmentation: 'Positive Conformists', 'Immediate Potentials', 'Positive Persuadables', 'Forced Behaviour' and 'Concept Rejectors'.

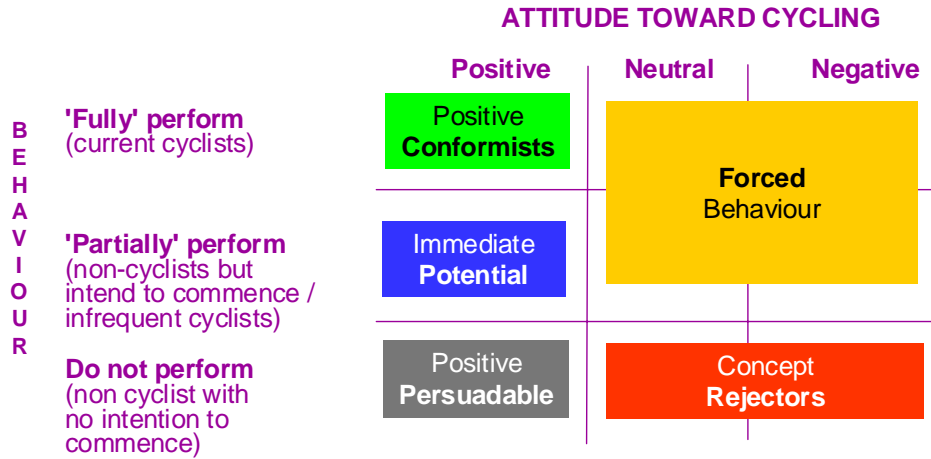
The segmentation analysis is further explained in the following Section 2.4.

2.4. AAB segmentation

In order to improve the usefulness of the research findings, additional analysis was undertaken using segmentation to define subgroups. Simply, this meant grouping together those with similar characteristics, based on a pre-defined model known as the **Awareness, Attitude, Behaviour (AAB)** model (Sheth & Frazier, 1982).

2.4.1. Cycling

The following diagram illustrates how the cycling segments were formed.



The various cells of the diagram were defined by questions 4, 8, 14 and 17 (see questionnaire in Appendix A for full questions) as follows:

Positive Conformists

This segment had a strong positive attitude towards cycling, and were current cyclists. The definition for this segment is as follows:

- Question 4:** Respondent had cycled in the past 6 months.
- Question 8:** Respondent made at least one cycling journey per month.
- Question 17:** Respondent “agreed” or “strongly agreed” with the statement that *“cycling is a viable alternative to driving your car over short distances”*

Immediate Potential

This segment had two groups of respondents :

- (1) those with a strong positive attitude towards cycling, who were currently cycling (but not regularly), and
- (2) those with a strong positive attitude towards cycling, who were intending to commence cycling in the next 6 months.

- Question 4:** Respondent had cycled in the past 6 months.
- Question 8:** Respondent made less than one cycling journey per month.
- Question 14:** Respondent was not currently cycling, but cited an intention (i.e. “6” or above) to take up cycling in the next 6 months.
- Question 17:** Respondent “agreed” or “strongly agreed” with the statement that *“cycling is a viable alternative to driving your car over short distances”*

Positive Persuadable

This segment comprised of respondents with positive attitudes towards cycling, but were not currently cycling and did not have an intention to take up cycling in the next 6 months.

Question 4: Respondent had not cycled in the past 6 months.

Question 14: Respondent expressed little intention (i.e. "5" or below) to take up cycling in the next 6 months.

Question 17: Respondent "agreed" or "strongly agreed" with the statement that "cycling is a viable alternative to driving your car over short distances"

Concept Rejector

This segment was comprised of respondents who recorded negative attitudes towards cycling, and who were not currently cycling nor did they intend to take up cycling.

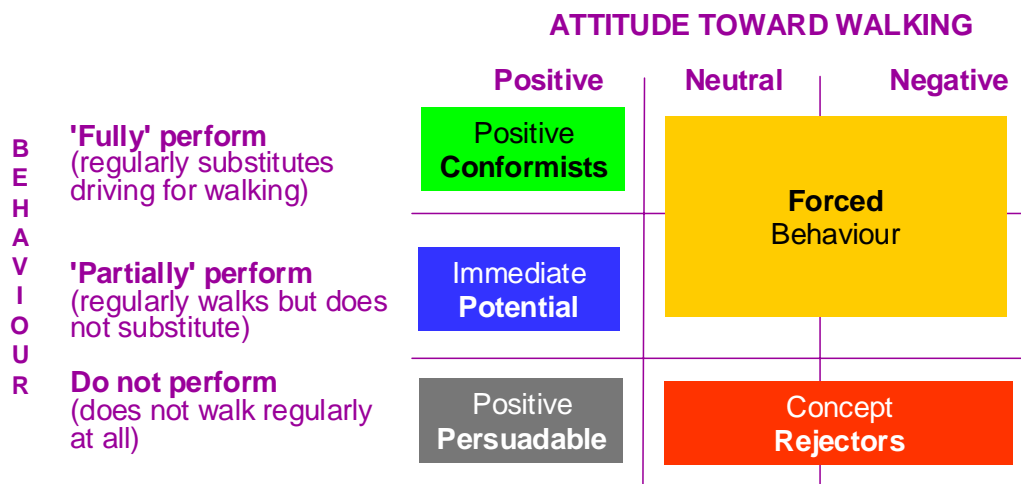
Question 4: Respondent had not cycled in the past 6 months.

Question 14: Respondent cited little intention (i.e. "5" or below) to take up cycling in the next 6 months.

Question 17: Respondent was "neutral", "disagreed" or "strongly disagreed" with the statement that "cycling is a viable alternative to driving your car over short distances".

2.4.2. Walking

The walking segments were adjusted in 2005 (and are therefore not comparable to 2004), to include the additional measure of attitude towards walking as a suitable alternative to driving over short distances. The diagram below illustrates how the cycling segments were formed.



The various cells of the diagram were defined by questions 18, 19, 26a/b and 27a (see questionnaire in Appendix A for full questions) as follows:

Positive Conformists

This segment regularly substituted a driving journey by walking, that is:

Question 19: Walked instead of driving (substitutes) once or more per week.

Question 27a: Respondent “agreed” or “strongly agreed” with the statement that
“Walking is a suitable alternative to driving your car over short distances”

Immediate Potential

This segment was not yet substituting, but walked regularly for recreational purposes, and had a neutral or positive attitude towards substituting.

Question 18: Walked recreationally once or more per week.

Question 19: Substituted driving by walking less than once per week.

Question 26a/26b: Did not select the response that “nothing would” prompt them to substitute.

Question 27a: Respondent “agreed” or “strongly agreed” with the statement that
“Walking is a suitable alternative to driving your car over short distances”.

Positive Persuadable

This segment was comprised of respondents who were not currently walking on a regular basis, but had a neutral or positive attitude to cycling

Question 18: Walked less frequently than once per week, if at all.

Question 19: Substituted less frequently than once per week, if at all.

Question 26a/26b: Did not select the response that “nothing would” prompt them to substitute.

Question 27a: Respondent “agreed” or “strongly agreed” with the statement that
“Walking is suitable alternative to driving your car over short distances”.

Concept Rejector

This segment was comprised of respondents who recorded negative attitudes towards substituting, and who were not currently substituting, or walking recreationally.

Question 18: Walked less frequently than once per week, if at all.

Question 19: Substituted less frequently than once per week, if at all.

Question 26a/26b: Indicated that “nothing would” prompt them to take up substituting.

Question 27a: Respondent was “neutral”, “disagreed” or “strongly disagreed” with the statement that
“Walking is a suitable alternative to driving your car over short distances”.

2.5. Significance testing

Whenever subgroup comparisons are made, it is important to distinguish between differences that are reliable (ie. statistically significant) and those that are not (ie. could be due to chance sample fluctuations, or sampling error). To assist in distinguishing between statistically reliable and unreliable differences, the table below (provided as a guide for the reader) lists the size of the differences required to reach statistical significance (at the 95% confidence level), for various sample sizes.

Table 2.5: Difference Required to be Significant When Comparing Two Percentages (95% Confidence Level)

Average Sample Size of Groups being Compared	Average of Two Percentages is ...		
	10% or 90%	20% or 80%	40% or 60%
50	12%	16%	19%
100	8%	11%	14%
200	6%	8%	10%
400	4%	5%	7%

Significance testing was based on the standard t-test at a 95% confidence level, and was conducted in Survey Craft or an Excel customised spreadsheet.

Unless otherwise specified, the results presented in this report are for the total sample, with subgroup results clearly indicated. All subgroup differences commented on in this document are statistically significant.

Results

3 Cycling objectives

3.1. Bicycle ownership, condition and intention to purchase

Objective 1: To record the proportion of respondents who personally own a bicycle and/or have access to one owned by another member of their household

Respondents were asked if they currently owned a bicycle (Q10a).

Half of all (50%) respondents claimed to personally own a bicycle. This finding was consistent with previous results, with the exception of October 2001.

- Those aged over 55 years continue to have the lowest rate of bicycle ownership at 36%, compared with younger age groups.
- It was noted last year that bicycle ownership amongst respondents aged 25 to 34 years had substantially declined from 63% (2003) to 50% (2004). No recovery was apparent in 2005 (53%).
- Those who were aware of any campaign (ie Cycle Instead, BikeWest, Travel Smart) were more likely to own a bicycle than those who had not heard of a campaign (56% vs. 46% respectively). Although causality can not be inferred, this suggests that those who own a bicycle could be more receptive to the campaign messages.

This measure is depicted in presentation slide 31.



Respondents were also asked how many bicycles in their household could be ridden by members of their household right now (Q34).

Two fifths (39%) of households had no bicycles in a roadworthy condition.

- Respondents over 55 years of age were less likely than younger respondents (ie under 55 years) to have any bicycles in the household (55% vs 38% respectively).

One in six (37%) households had one bicycle, a further 20% had two bicycles, and 14% had three bicycles that were in roadworthy condition. One in ten (11%) had more than four bicycles in their household in a roadworthy condition.


- There was a greater propensity for cyclists³ to have more than one bike their household.

³ For the purpose of this survey, a cyclist is defined as a person who has cycled in the last 6 months.

Objective 2: To record the types and condition of bicycles in the household

Those respondents, who personally owned a bicycle were asked whether their bicycle was in a roadworthy condition (Q12).

Forty four percent of the respondents who owned a roadworthy bicycle said that they could ride their bicycle immediately, which was consistent with previous tracking results. When extrapolated back to the total number of bicycles, this is equivalent to around nine in ten of all bicycles being able to be ridden immediately.

The number of roadworthy bicycles is shown in presentation slide 32 

Respondents who personally owned a bicycle were asked what type of bicycle it was (Q11a), and those intending to buy a bicycle were asked what type they thought they might purchase (Q11b).


Mountain bicycles remained the most common type of bicycle owned (48% of all respondents either owned or intended to purchase a mountain bicycle).

- Those under 55 years of age were more likely to prefer *mountain bicycles* than those over 55 years of age (57% vs 17% respectively).

One in seven respondents (14%) mentioned brand name bicycles.

- *Brand name* bicycles were more likely to be mentioned by males (19%) than females (8%), as were racers (12% males, 2% females).

Females were more likely to say that they *didn't know* what sort of bicycle they owned or intended to purchase than males (11% vs 2% respectively). Also, not surprisingly, females were more likely to mention they owned or intended to purchase a *'lady's' bike* than were males (16% vs. 0% males).


All bicycle types are shown on presentation slide 34 

Objective 6: To measure the intention to purchase a bicycle by current non-users

Those who did not currently own a bicycle were asked if they intended to purchase a bicycle in the next 6 months (Q10b).

Among those respondents who did not currently own a bicycle, 6% said they intended to purchase a bicycle in the next 6 months, which is equivalent to 3% of all respondents. There has been no significant shift in this measure over time.

- Those aged between 25 to 34 years were more likely than other age groups to say they intended to purchase a bicycle (11% 18-24 yrs; 22% 25-34 yrs; 4% 35-54 yrs; 1% 55+ yrs).
- Fewer respondents aged over 55 years intend to purchase bicycles, with a decrease from 11% seen in 2003 down to 0% in 2004, and similar minimal interest recorded in 2005 (1%).

Intention to purchase a bicycle is shown on presentation slide 33 

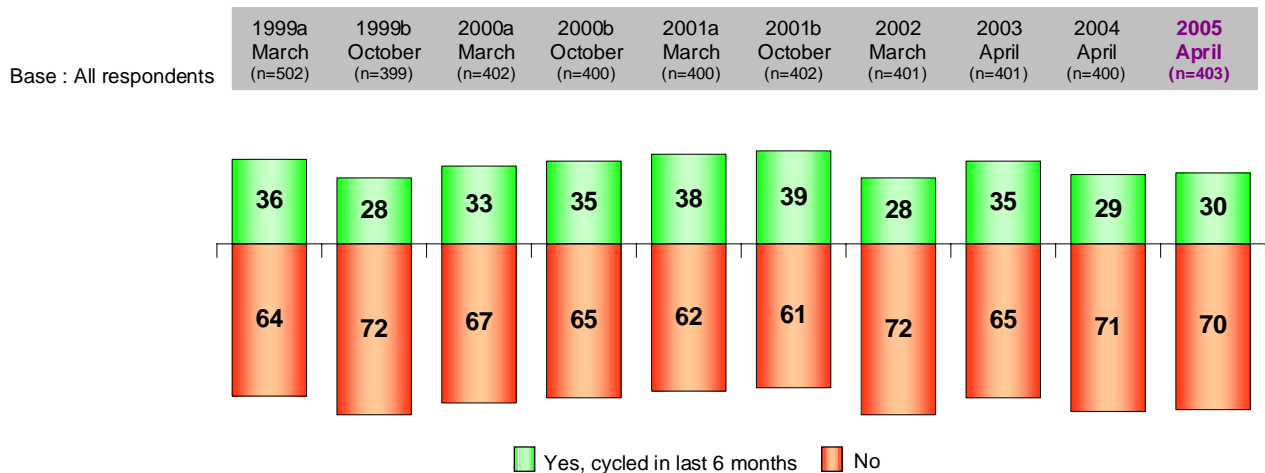
3.2. Cycling frequency, distance, time and purpose of trips, and intention to increase behaviour

Objective 3: To measure how many respondents have undertaken cycling activities in the past six months

Respondents were asked if they had cycled in the last 6 months (Q4).

Overall, one in three (30%) respondents had undertaken cycling activities in the past six months, which was consistent with previous tracking results.

Figure 3.2a Number who have cycled in the past 6 months



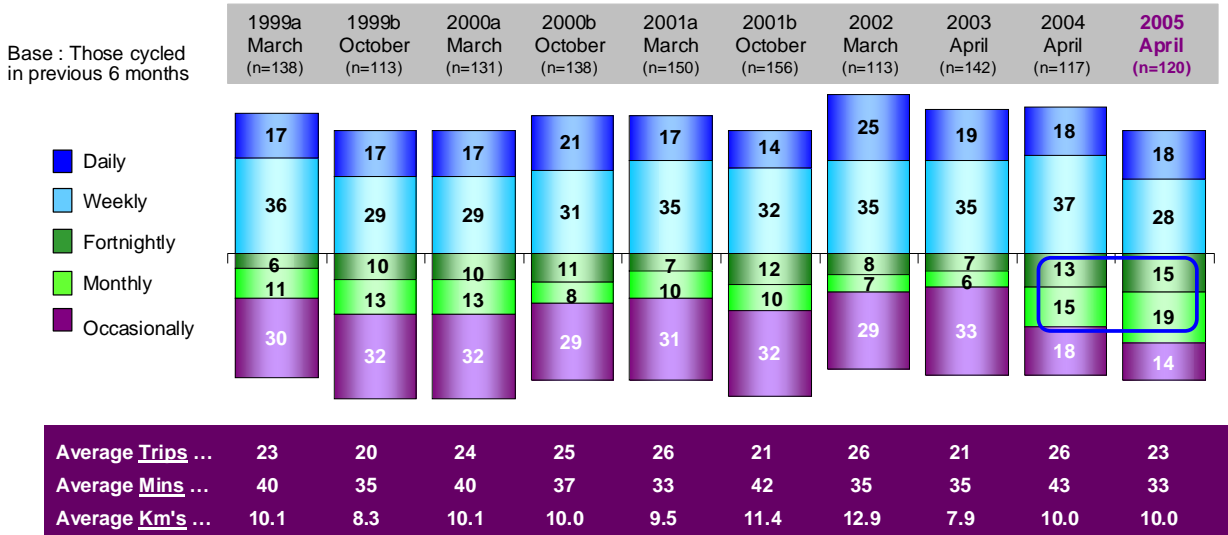
Sub-group analysis

- The proportion of females (23%) that had cycled in the past 6 months remained significantly lower than the proportion of males (36%).
- Those who were under 35 years old, were more likely than those who were older, to have cycled in the previous six months (36% 18-24 yrs; 44% 25-34 yrs; 29% 35-54 yrs; 20% 55+ years).
- Not surprisingly, those who owned a bicycle were more likely to have cycled in the previous six months than were those who didn't own a bicycle (54% and 4% respectively). Conversely, half of those who did own a bicycle had not cycled in the previous six months (46%) compared with nearly all of those who did not own a bicycle(95%), confirming the obvious - that owing a bicycle is a prerequisite to undertaking cycling.
- Consistent with previous results, those aware of any campaign (ie Cycle Instead, BikeWest, Travel Smart) were significantly more likely than those who were not aware of a campaign, to have cycled in the past 6 months (35% aware vs 26% not aware). Although causality can not be inferred from this, it does appear that those who cycle are more likely than those who do not cycle, to take note of the campaign.

Objective 4: To record the frequency, distance, time and purpose of cycling trips undertaken

Those who had cycled in the last 6 months were asked how many 'trips' they made during that time (a 'trip' is defined as a one way journey) (Q6a). They were also asked what their average cycling time was for a single trip (Q7), how often they made this trip (Q8) and how many kilometres they thought they had travelled (Q9).

Figure 3.2b Frequency, distance, and time of cycling trips undertaken




Among those who had cycled in the previous 6 months, around half were cycling 'weekly' or more often (46%). One in five (18%) cycled 'daily'. Overall, no significant change was observed from the 2004 results. However, there has been a **notable increase** since April 2003 in the proportion of respondents who said they **cycle 'fortnightly'** (7% in 2003 to 15% in 2005) or **'monthly'** (6% in 2003 to 19% in 2005), and a **corresponding decline in those who said 'occasionally'** (33% in 2003 to 14% in 2005).

There has been some fluctuation in the number of trips, the distance and time taken across the tracking periods. In 2005, the average number of cycling trips was 23 (one way trips), an average duration of 33 minutes, over a distance of 10.0 kilometres.

The main reasons respondents said that they had cycled in the previous six months was for:

- recreational or social purposes (52%);
- general exercise (22%);
- to get to school or work (11%); and
- to a friend's place or the shops (11%).

Notably there has been a decline since the peak recorded in October 2000 (40%), to April 2005 (22%), in the number of respondents saying that the main reason they cycled was for 'general exercise'.

Reasons, frequency, time and distance of trips are shown on presentation slides 36-40 

Objective 5: To identify the level of change in cycling frequency over the past six months and any intended change in the coming six months

Respondents who had cycled in the last 6 months were asked if they had increased or decreased their cycling behaviour compared to the 6 months previous (Q6b), and whether they intended to increase their cycling behaviour in the next 6 months (Q6c).

Overall, no significant change was recorded in 2005 for the proportion of those having either increased their cycling behaviour over the previous 6 months (31%), or of those intending to increase their cycling in the next 6 months (29%).

- Males (56%) were more likely than females (36%) to say that they were cycling 'about the same' amount in the previous six months, compared with the six months prior to that.
- One in ten (9%) of those classified as 'Potential Cyclists' had increased their cycling behaviours in the previous six months, however nearly half of this group (46%) also said they intended to increase their cycling behaviour in the following six months.
- No other meaningful subgroup differences were evident.

Changes in cycling
behaviour is depicted on
presentation slide 41



3.3. Barriers to cycling, and intentions & incentives to increase cycling behaviour

Objective 7: To examine the reasons why non-users have not cycled and to gauge their intention to commence cycling in the near future

Those who had not cycled in the previous 6 months were asked the key reasons why they had not.

The **reasons** why non-users have not cycled included:

- 'lack of time' (17%),
- 'no bicycle' (17%),
- 'too old' (12%).
- 'lack of energy' (12%),
- 'prevented by health' (12%),
- 'do not want to' (11%)
- 'do not enjoy' (9%), and
- 'other transport is quicker and easier' (12%).


Significant differences by subgroup for these key reasons are shown below.

BARRIERS TO CYCLING - ALL REASONS					OWN BIKE	
BASE: Not cycled in prev. 6mths	AGE				Yes	No
	18-24yrs	25-34yrs	35-54yrs	55+yrs	%	%
	%	%	%	%	%	%
Lack of time	25	32	18	9	34	9
No bicycle	14	22	22	11	4	24
Too old	-	-	1	33	1	17
Lack of energy	11	17	14	7	20	8
Prevented by health	-	5	12	19	12	13
Do not want to	14	10	14	6	9	12
Other transport quicker/easier	21	29	6	10	14	12

- Those who own a bicycle were more likely than those who did not own a bicycle to say that the reasons they hadn't cycled was 'lack of time' (34% vs. 9% respectively), and 'lack of energy' (20% vs. 8% respectively).
- Those who did not own a bicycle were more likely than those who did own a bicycle to say that the reasons they hadn't cycled was they 'didn't own a bicycle' (24% vs 4% respectively), and that they were 'too old' (17% vs 1% respectively).
- Younger respondents (ie those under 55 years) were more likely than respondents aged 55 or over, to say their reasons for not cycling were 'lack of time', 'no bicycle', they simply 'don't want to' and 'other transport quicker and easier'.

- Older respondents (ie those over 55 years) were more likely than younger respondents to mention *health reasons*, as contributing to them not cycling, including that they considered themselves to be 'too old' or 'prevented by health'.
- Females were more likely than males to say that they 'do not enjoy cycling' (9% vs 2% respectively), whereas males were more likely than females to say that 'other transport is quicker and easier' (17% vs. 8% respectively).

Barriers to cycling are shown on presentation slides 44-47




Respondents were also asked to rate the likelihood of them taking up cycling in the next 6 months on a scale from 0 'no chance or almost no chance' to 10 'certain or practically certain' (Q14).

Around one in eight (12%) respondents who were not currently cycling expressed an intention (of '6' or higher on a scale of 0 to 10) **to take up cycling in the next 6 months.** Of some note however, is that 62% of respondents who were currently not cycling had 'no intention' (ie score of 0) of taking up cycling in the next six months.

- There was a greater propensity for older respondents (in particular those aged over 55) when compared to younger respondents, to say they had no intention of taking up cycling (77% vs. 54% under 55 years).
- Conversely, younger respondents (ie those aged under 35 years) were more likely (significant at the 90% confidence level) to say that they intended to (ie score of '6' or higher) take up cycling when compared with older respondents (20% vs. 10% over 35 years).
- Those who did not own a bicycle were also significantly more likely to say that they had no intention to take up cycling in the next six months compared with those who own a bicycle (76% vs. 34% respectively). This further confirms that not owning a bicycle is a major barrier to taking up regular cycling.

Intentions to take up cycling are shown on presentation slides 42-43



Objective 8: To examine incentives for current non-users to take up cycling, both personal and structural aspects

*Non-cyclists were asked if there was anything that might prompt them to take up cycling in the next 6 months (Q15). Their responses are referred to in the text as '**personal**' incentives, since they have nominated them as of relevance to them personally.*

*However, in another question, all respondents were asked to say what they thought might make people, generally, think about taking up regular cycling (Q16). These responses are referred to in the text as '**structural**' motivators.*

Clearly, the strongest incentive for taking up regular cycling was for 'exercise and fitness benefits' (for 28% this was the main (or first mentioned) personal incentive, with 40% of those who already cycle mentioning it in total; and across the sample generally, 15% nominated it as a reason others may cycle ie. a structural motivator). While this factor was the strongest personal incentive, there has been a decline since the peak result recorded in March 2001, when 50% of respondents mentioned it as a main personal incentive; however this decline was due to the introduction of a new code 'health improvements', which was introduced in April 2003. This new code separated the health improvement aspects out from more general 'fitness benefits'. In 2005, just over one in ten mentioned 'health improvements' as both a personal incentive and a structural motivator (10% main personal incentive; 15% in total mentioned it; across the total sample 15% mentioned it as reason others may cycle ie. a structural motivator).

Whilst factors such as 'more cycle paths' (25%), 'better cycle paths' (14%) and 'better and safer roads' (22%) were rated as high structural incentives (ie reasons that might encourage others to cycle) , 'safer/decent cycle paths' were, in contrast, considered substantially less important as personal incentives (6% main personal incentive, 11% across all personal incentives).

There was a significant decline in the number of respondents claiming that 'better cycle paths' would increase the up-take of cycling, from 24% in 2004 down to 14% in 2005.

- Of note, cyclists⁴ were more likely to mention 'better cycle paths' than were non-cyclists (20% vs. 12% respectively), as were those who owned a bicycle (19%), compared with those who don't (10%).

Other reasons why people, in general, might take up cycling

Notably there was a significant increase in the number of respondents mentioning the 'increase in petrol prices' as a reason for people to consider taking up cycling, compared with 2004 (5% in 2004, increasing to 10% in 2005). Of some interest is the fact that those who already cycle do not mention burgeoning fuel prices as a personal incentive.

⁴ For the purpose of this survey, a cyclist is defined as a person who has cycled in the last 6 months.

- Surprisingly, *petrol prices* were more likely to be mentioned by 35-45 years olds than younger respondents (2% 18-24 yrs; 7% 25-34 yrs; 14% 35-54 yrs; 10% 55+ years).

'More advertising/awareness of bike paths' was mentioned by one in ten (9%) respondents.

- It was noted that there was a propensity for younger respondents to mention the need for more advertising (16% 18-24 yrs; 12% 25-34 yrs; 9% 35-54 yrs; 4% 55+ yrs).

One in twenty (4%) said that cycling was *'better for the environment'* as a structural incentive, whereas 2% mentioned *'environmentally friendly'* as a personal incentive.

- Those aged 25-34 years were more likely than other age groups to mention this structural incentive (2% 18-24 yrs; 11% 25-34 yrs; 3% 35-54 yrs; 2% 55+ years).

Various *end-of-trip facilities* recorded low mentions as an incentive, for example *'bicycle storage'* (4%), and *'workplace facilities'* (2%). It is hypothesised that people who have never seriously considered cycling to work, would not spontaneously think of the lack of end-of-trip facilities as a major deterrent. However, if this were a prompted or 'closed' question, these structural factors would achieve significantly higher mentions.

Other personal incentives

Just over one in ten (13%) mentioned that having *'a companion to cycle with'* would prompt them to take up cycling.

- Females were significantly more likely to mention the desire for *'a companion to cycle with'* than were males (20% vs 6% respectively).

Structural and personal incentives to cycle are shown on presentation slides 48-51



4 Walking objectives

Questions relating to walking behaviours were introduced in 2004, and were modelled on existing cycling questions to maintain internal consistency within the questionnaire.

'Walking', as a general activity, needed to be clarified with the respondent so they understood what was being measured.

- Firstly, 'walking' was defined as not being something that a person does indoors such as at home or work, but walking for other reasons outdoors.
- Secondly, 'walking' was defined as something you do as a recreational or leisure activity for exercise, or as a method of transport for journeys that can be substituted for short car journeys.

The latter is the focus for the Walking Unit at DPI, and thus all questions were framed in this context.

4.1. Walking frequency and reasons for substituting short car journeys

Objective 10: To record the proportion of respondents who have substituted a car journey by walking in the last month

Respondents were asked how often they walked short journeys instead of driving a car (Q19).

Seventy percent of respondents reported that they substituted a car journey, by walking, at least once a monthly, which was a significant increase from the 63% recorded in 2004. Most of this growth was due to the increase (significant at the 90% confidence interval) amongst those who walked at least once per week - from 37% in 2004 up to 43% in 2005. There was also an increase in those who walked fortnightly from 4% in 2004 to 7% in 2005.

However, of some concerns is that around one in four (26%) said that they never substituted a car journey for walking.

- Those aged over 55 years were more likely than those under 55 years to say that they have never substituted a car journey with a walk (36% vs. 22% those under 55 years).
- No other significant sub-group differences were evident.

Those substituting a walking journey is depicted in presentation slide 53



Objective 11: To record the frequency, distance, time and destinations of walking journeys undertaken

Respondents were asked how frequently they substituted a driving journey with walking. They were also asked the average time and distance for a typical single walking journey (Q22, Q23). A journey involves the two-way trip to a destination.

On average, respondents said that they walked instead of taking a short car journey, 14 times in a month. The average journey was 3 kilometres and was of 35 minute duration.

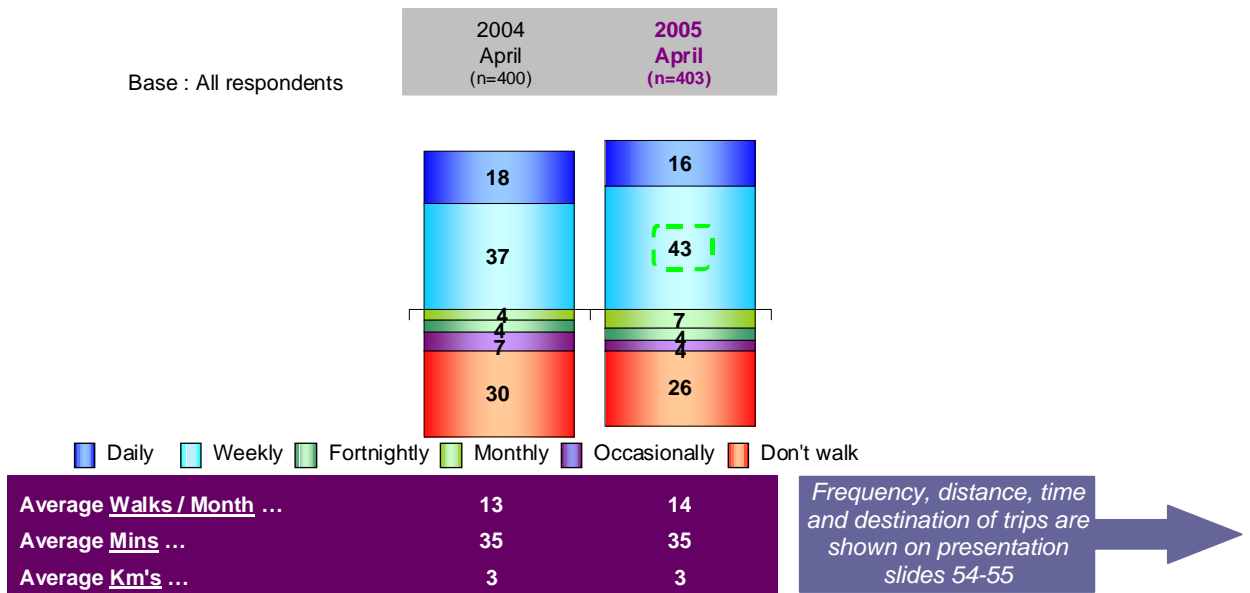
In 2005 during an average journey, 3% of respondents walked less than 1 km, 22% walked 1 km, 24% walked 2kms, 19% walked 3 kms, 12% walked 4 kms and 12% walked 5 kms. Only one in ten (9%) walked more than 5 kms.⁵

Respondents were also asked about the destinations they walk to when they substituted a car journey (Q20).

When substituting a short car journey, respondents most usually walked 'to the shops' (77%), 'a friend's place' (22%), to the 'grocery store/post office/library' (11%), 'to and from their place of education' (7%) or 'to and from work' (6%). Other recreational destinations included 'to the park' (22%), and 'to beaches, rivers and lakes' (8%).

- Those aged 25-34 years were more likely to walk 'to the shops' than other age groups (69% 18-24 yrs; 91% 25-34 yrs; 75% 35-54 yrs; 74% 55+ yrs).
- Females were more likely to walk 'to a friend's place' than were males (28% vs 16% respectively).

Figure 4.1 Frequency, distance, and time of walking journeys undertaken



⁵ In 2005 the scale was adjusted to show each kilometre walked for distances travelled less than 5 kms. Thus, results are not comparable with 2004 results between 1-5 kms, and the difference in the number of respondents saying less than 1 km is also likely to be the result of the change in scale.

Objective 12: To record reasons why respondents walk

Respondents were asked the key reasons for walking instead of taking short car journeys (Q21).

The most mentioned reasons given for substituting walking for a short car journey included:

- 'exercise/health' (59%),
- 'recreational/leisure' (17%),
- 'to save money' (24%),
- 'more convenient' (17%), and
- 'exercise the dog'⁶ (9%).

Significant differences by age for these key reasons are shown below.

REASONS FOR SUBSTITUTING - ALL REASONS				
BASE: Walks at least monthly	AGE			
	18-24yrs	25-34yrs	35-54yrs	55+yrs
General exercise/health reasons	41%	50%	66%	64%
Recreation/leisure purposes	6%	25%	18%	13%
Save on fuel	56%	21%	21%	17%
Environmentally friendly	3%	11%	7%	1%

- Those respondents over 35 years of age were more likely to mention 'general exercise/health reasons' compared with those under 35 years.
- In particular those aged 25-34 years, were more likely than those aged 18-24 years to say that they walk for 'recreation/leisure purposes'.
- Those aged 18-24 years were more likely than those aged over 24 years to mention that they substitute walking to 'save on fuel'.
- Those aged over 55 years were least likely to mention that walking was 'environmentally friendly', compared to the other aged groups and in particular, those age 25-34 years.

Notably there has been a decline in the number of respondents mentioning that walking is an alternative transport (6% in 2004 to 1% in 2005).

- This has been mainly due to fewer mentions by males in 2005 compared to 2004 (9% vs. 1% respectively).

Reasons why respondents walk are shown on presentation slides 56-57 

⁶ Presumably these people still substitute a car trip for walking by, for example, instead of driving to the shops they walk, so that they can exercise the dog at the same time.

4.2. Barriers to walking, and incentives to substitute short car journeys

Objective 13: To record reasons why respondents do not walk.

Respondents were asked the key reasons why they do not substitute a car journey by walking (Q24/25).

The key reasons why people do not walk instead of drive include:

- 'distance is too far' (26%),
- 'other transport quicker/easier' (22%),
- 'lack of time' (17%),
- 'prevented by health' (13%),
- 'lack of energy' (11%), and
- 'less convenient' (10%).

There was a significant decline in those mentioning that a barrier to walking was 'lack of time' (29% 2004 vs 17% 2005). However, at the same time there was a significant increase in the proportion of those who said 'distance' was a barrier to them walking instead of driving (16% 2004 vs. 26% 2005).

There were several gender differences observed:

- Females were more likely than males to think that 'distance' was a barrier to substituting walking (36% vs. 18% respectively). However, this could be related to the fact that the main destination is 'to the shops' and women, being the main grocery buyers, may be suggesting that the shops are too far away for substitution on some occasions.
- Males were more likely than females to say that they 'prefer other exercise' to walking (8% vs. 0% respectively).

Reasons why respondents do not walk are shown on presentation slides 58-59



Objective 14: To identify the incentives that might encourage people to walk more in the near future

Those who were not substituting walking for short car journeys were asked what would prompt them to walk more instead of driving (Q26).

Respondents indicated that they would be motivated by:

- 'need to exercise more/get fit' (22%),
- 'recreational/leisure purposes' (14%),
- 'living closer to facilities' (11%),
- 'if they had more time' (4%), and
- 'improved health' (3%).

Notably, a sizeable proportion of those not substituting (37%) said 'nothing would' get them to substitute walking instead of taking short car journeys, consistent with the 2004 results (38%). There were no significant sub-group differences.


There was a significant decline in the number of respondents who mentioned that they needed '*more time*' to go walking (12% in 2004 compared to 4% in 2005). Notably, 'lack of time' also decreased as a barrier to walking (commented on earlier), suggesting that there has been a 'real' decline in this perceived barrier to walking. It is possible that the "Find 30" campaign, that promotes finding ways to make time to exercise, has begun to change perceptions about the amount of time needed to exercise.

There has been an increase in the number of respondents mentioning '*recreation/leisure*' reasons for increasing walking behaviours (5% in 2004 compared to 14% in 2005).

- Notably in 2004 there was no difference by gender (5% males vs. 5% females), however there has been a relative growth in the number of males saying 'recreational/leisure' reasons in 2005 (20% males vs. 7% females).

There has also been a significant increase in the proportion saying that '*having someone to walk with*' would encourage them to take up walking (1% in 2004 compared to 8% in 2005).

Incentives to walk are shown on presentation slides 60-61



To further explore the potential of walking groups to encourage walking by providing companionship, respondents were asked whether they would be interested in joining a walking group if there was one in their local area (Q27b). Results are shown below.

INTERESTED IN JOINING A WALKING GROUP												
	TOTAL	GENDER		AGE				AAB SEGMENTATION				
		Male	Female	18-24	24-34	35-54	55+	Conformist	Potential	Persuadable	Forced	Rejector
Yes, interested	29%	18%	40%	18%	23%	31%	34%	26%	35%	46%	33%	0%
No	68%	79%	56%	82%	74%	64%	64%	70%	55%	54%	66%	100%

In total, three in ten (29%) respondents were interested in joining a walking group if there was one in their local area.

- Females were more likely than males to be interested in joining such a walking group (40% vs. 18% respectively).
- Those aged over 35 years were more likely to be interested than those in the younger age groups.
- Respondents classified as 'Persuadable' in the attitude segmentation, were more likely than 'Conformists' (ie who are already walking once a week) to be interested in joining a walking group.

5 Campaign awareness objectives

5.1. Spontaneous and prompted recognition of the campaign slogans

Objective 15: To assess the awareness of 'Bikewest', 'Cycle Instead', 'Travel Smart' and 'Walk There Today'

Respondents were asked a series of questions relating to the campaign properties. These included both spontaneous and prompted awareness questions.

Cycle Instead

When respondents were asked whether they recalled hearing any cycling slogans, they mentioned the following: 'Cycle Instead' (7%), 'Bike Week' (3%), 'Bike it to Work' (3%), 'Free Breakfast' (2%) and 'Bikewest' (1%). These findings are consistent with previous results.

- Those who spontaneously mentioned 'Cycle Instead' were more likely to be aged under 35 years than over (18% 18-24 yrs; 15% 25-34 yrs; 6% 35-54 yrs; 1% 55+ yrs).
- Those who owned a bicycle were more likely than those who did not, to spontaneously recall the 'Cycle Instead' slogan (11% vs 3% respectively), suggesting that these respondents are more receptive to cycling messages.
- Those respondents who were classified as 'Conformist' appear more likely to recall the 'Cycle Instead' slogan than other segments (15% Conformists; 7% Potential; 5% Persuadables; 8% Forced; 2% Rejectors).

When prompted with the phrase 'Cycle Instead' half of all respondents (49%) recalled the slogan, which is a significant increase from the one in three (36%) who said this in 2004, and a further significant increase from the level recorded in October 2000 (21%).

- Sub group differences similar to those noted on spontaneous recall, were also noted for prompted recognition, with those in the younger age groups more likely to recall the slogan than were older respondents (59% 18-24 yrs; 63% 25-34 yrs; 48% 35-54 yrs; 40% 55+ yrs).
- There were also differences noted by AAB segmentation with those classified as 'Rejectors' least likely to recognise the slogan, compared to those from other segments (49% Conformists; 48% Potential; 53% Persuadables; 46% Forced; 35% Rejectors).

When the spontaneous and the prompted measures are combined, overall recognition of the 'Cycle Instead' slogan sums to over half (56%) of all respondents.

Awareness of the 'Cycle Instead' slogan is shown on presentation slides 14, 15, 17


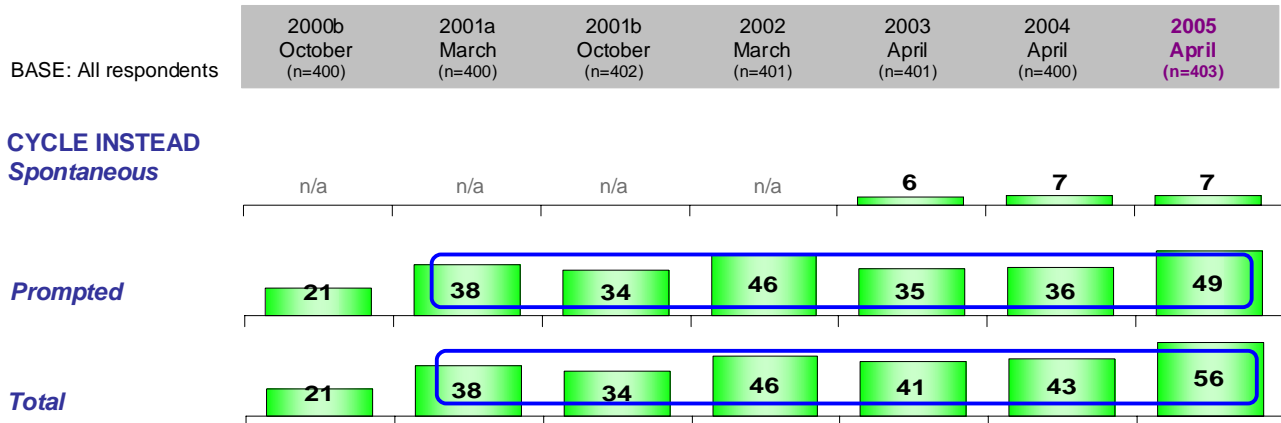


Figure 5.1a Spontaneous recall and prompted recognition of “Cycle Instead”



Walking

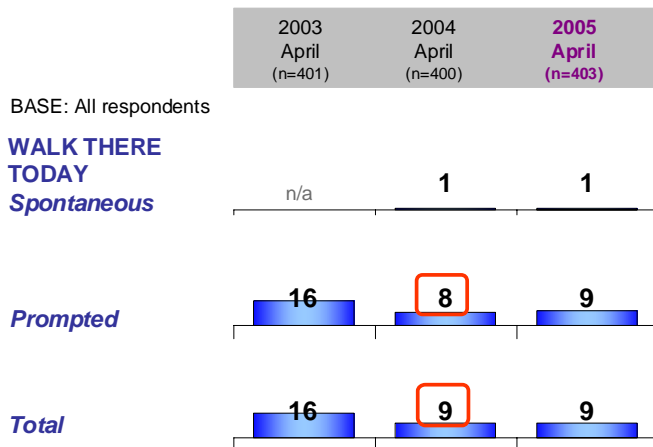
There was only minimal spontaneous recall for the **'Walk There Today'** slogan, which is not surprising considering that the campaign was promoted six months previously. Around one in seven (15%) spontaneously recalled a slogan of the *'Find Thirty'* campaign, and these included *'Find Thirty'* (12%), *'Exercise for 30 minutes'* (3%) and *'It's not a big exercise'* (3%).

- The *'Find Thirty'* slogan was more likely to be recognised by males than females (16% vs. 8% respectively), and those in the younger age groups compared with the older respondents (20% 18-24 yrs; 23% 25-34 yrs; 12% 35-54 yrs; 2% 55+ yrs).
- Interestingly, 2% spontaneously mentioned walking clubs, and these respondents were more likely to be females than males (4% females vs. 1% males) and over 55 years compared with those under 55 years (6% vs 1% respectively).


When prompted with the phrase **'Walk There Today'**, around one in ten (9%) subsequently recognised the slogan, which was comparable with the 2004 result of 8%.

- Notably there was a significant decline in recognition of the slogan from 2003 (16%), which was almost completely due to a significant decline in the number of respondents aged over 55 years who recalled the slogan (22% 2003, 8% 2004, 8% 2005).

Figure 5.1b Spontaneous recall and prompted recognition of 'Walk There Today'



Awareness of the 'Walk There Today' slogan is shown on presentation slides 16, 18



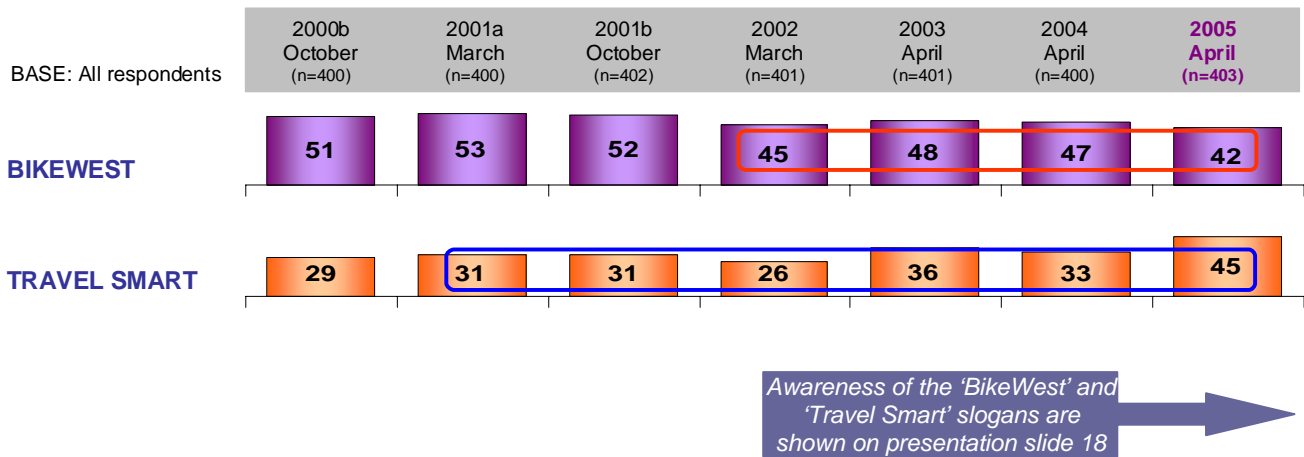
‘BikeWest’ and ‘Travel Smart’

Interestingly, around two in five respondents (42%) still recognised the ‘BikeWest’ slogan. Although recognition has declined significantly since 2001, compared with the other slogans, recognition remains strong, and shows the residual strength of this property in spite the lack of promotion in recent years.

- Not surprisingly, older respondents were more likely to recall the ‘BikeWest’ slogan than were younger respondents (23% 18-24 yrs; 37% 25-34 yrs; 48% 35-54 yrs; 44% 55+ yrs).

Nearly half of all respondents (45%) now recognise the ‘Travel Smart’ slogan, which is a significant increase from the third (33%) of respondents who recognised the slogan in 2004, and builds on the increase that was observed in 2000 (29%). There were no meaningful subgroup differences for recognition of the ‘Travel Smart’ slogan.

Figure 5.1c Spontaneous recall and prompted recognition of ‘BikeWest’ and ‘Travel Smart’



5.2. Where respondents heard about the campaigns

Objective 16: To identify where respondents heard about the campaign

Respondents were asked where they had heard about the various campaigns.


The media through which respondents had heard or seen each campaign were newspapers, television and radio.

Although none of the campaigns had been actively promoted on television, each slogan was alleged by some respondents to have been seen or heard on TV.

Respondents to surveys typically claim that they have seen or heard ads on TV, as they often assume that since that is their primary source of such information, that is the most likely place they would have been exposed to it. It is presumed that this is also the case here.

Base: Prompted awareness of the respective campaign	Cycle	Walk	Bikewest	Travel
	Instead	There Today		Smart
	(n=225)	(n=36)*	(n=171)	(n=183)
	%	%	%	%
Newspapers	9	19	25	16
TV	37	42	21	21
Radio	17	6	19	8
Posters / billboards / stickers	16	11	9	8
Work / professional exposure	4	3	7	4
Bus / train stations	4	3	2	12
Word of mouth	2	6	7	1
Brochures	1	3	4	6
Bike shop	1	-	4	1
School	<1	-	2	1
Media	-	-	1	-
Bike Week	<1	-	-	1
Internet	-	-	3	1
Travel packs	1	-	2	3
<i>Other</i>	1	3	4	1
<i>Don't know</i>	2	25	20	30

** Note, small sample size*

Sources of campaign awareness are shown on presentation slides 20-22 

5.3. Attitudes towards walking and cycling

Objective 9: To assess the general attitudes towards cycling and cyclists

Objective 17: To assess the general attitudes towards walking

Respondents who were aware of the slogan when prompted, were asked what were the main messages the 'Cycle Instead' and 'Walk There Today' campaigns were trying to communicate.

Half of all respondents thought the slogan 'Cycle Instead' communicated the message to 'cycle instead of using a car for short journeys' which is clearly on target with the intention of the campaign. The campaign also communicated that '*cycling is good for health*' (43%), '*improves your fitness*' (40%) and is '*good for the environment*' (38%)

- There were several significant differences by age, with younger respondents showing a greater propensity to mention '*cycling instead of using the car for short journeys*' (65% 18-24 yrs; 53% 25-34 yrs; 56% 35-54 yrs; 41% 55+ yrs), whereas older respondents were more likely to mention that '*cycling is good for your health*' (29% 18-24 yrs; 39% 25-34 yrs; 46% 35-54 yrs; 53% 55+ yrs).
- Respondents who owned a bicycle were more likely than those who didn't to say the main message of the 'Cycle Instead' slogan was that '*it is good for the environment*' (46% vs. 28% respectively). Similarly, cyclists⁷ were more likely to mention this message compared to non-cyclists (51% vs. 31% respectively), and it is hypothesised that for some respondents this could well be a motivation for them cycling, although causality can not be inferred.

The small number of respondents who recognised the 'Walk There Today' slogan when prompted does not provide a sufficient large sample, upon which to draw conclusions (n=36). However, it does appear that the key messages of '*walking instead of using car for short journeys*', '*walking is good for your health*', and '*walking improves your fitness*' were communicated in this campaign.

Respondents were prompted with a series of statements about cycling and walking and asked to rate their level of agreement, or disagreement with each. Attitudes to walking as a suitable alternative to driving were introduced in 2005.

In 2005, the vast majority (79%) continued to 'agree' that 'cycling is a viable alternative to driving short distances', which is comparable with the previous year results (80% 2004). However, this was a significant decline from the peak recorded in 2003 (87%), which has not since recovered. Notably in 2005, there has been a significant increase in the proportion of respondents who 'strongly agree' that cycling is a viable alternative to driving over short distances, from 46% (2004) to 60% (2005).

- Of those who were aware of the 'Cycle Instead' slogan when prompted, were more likely than those who were not aware, to 'strongly agree' that cycling was a viable alternative over short distances. Hence, those who had been exposed to the 'Cycle Instead' campaign were

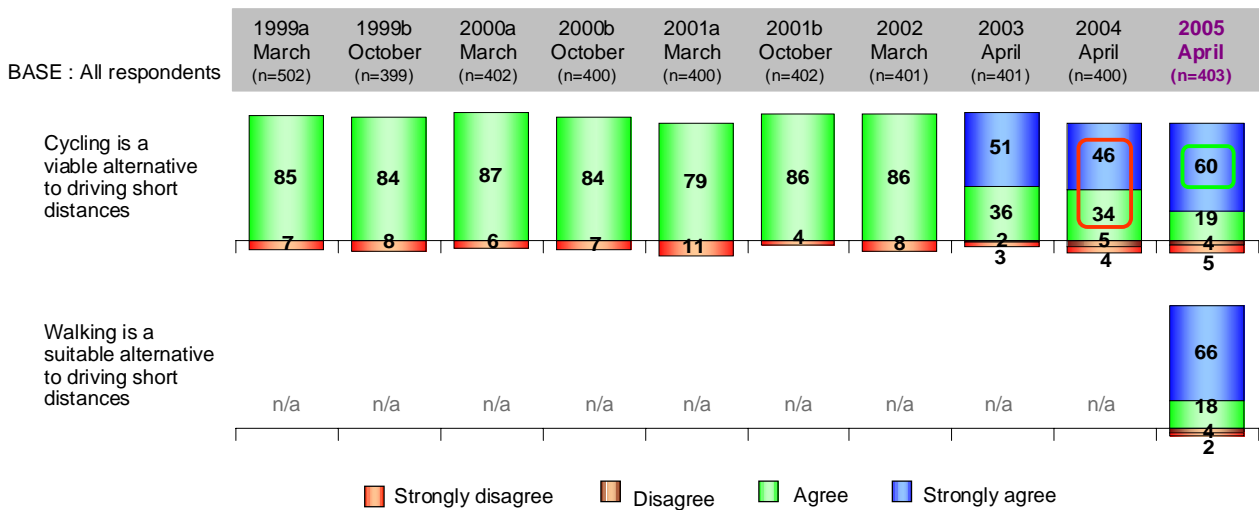
⁷ For the purpose of this survey, a cyclist is defined as a person who has cycled in the last 6 months.

significantly more likely than those who had not, to think that cycling was a viable alternative to driving.

The vast majority (84%) of respondents *‘agreed’* that ‘walking was a suitable alternative to driving over short distances’, with two thirds (66%) *‘strongly agreeing’* with the statement.

- Females were more likely than males to *‘strongly agree’* that walking was a suitable alternative to driving over short distances (72% vs. 60% respectively).
- Also older respondents, in particular those aged 35-54 years, were more likely than the younger age groups to *‘strongly agree’* (52% 18-24 yrs; 58% 25-34 yrs; 73% 35-54 yrs; 68% 55+ yrs).
- Those who were aware of the ‘Walk There Today’ campaign when prompted were significantly more likely to *‘strongly agree’* that walking was a suitable alternative to driving short distances than those who were not aware of the campaign (83% vs. 64% respectively).

Figure 5.3 Attitudes to substituting cycling and walking for short car journeys



Attitudes to cyclists

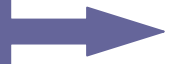
Just over half (55%) of all respondents *'agreed'* that 'cyclists should be more considerate of other road users', which was consistent with previous years' results (56%). There has been a significant increase in the proportion who *'strongly agree'* with this statement (24% 2004 vs 33% 2005), which represents a recovery from the 2003 results (34%).

- Males were significantly more likely to *'strongly agree'* than females that cyclists should be more considerate of other road users (39% vs. 27% respectively).
- Interestingly, those who own a bicycle rather than those who didn't (13% vs. 6% respectively), as well as those classified as 'Conformist' compared with the other AAB segments (17% Conformists; 12% Potential; 7% Persuadables; 8% Forced; 6% Rejectors), were more likely to *'disagree'* (although not *'strongly'*) that cyclists should be more considerate of other road users.

The majority (62%) of respondents *'agreed'* that 'cyclists have as much right to be on the road as a car', representing no change from the previous year results (65%). Notably there has been a significant increase in those who said they *'strongly agreed'* from 2004 (35% vs. 44% 2005).

- Females were significantly more likely than males to *'strongly agree'* that cyclists have as much right to be on the road as a car (50% vs. 38% respectively), as were older respondents, particular in comparison with the 18-24 year old age group (27% 18-24 yrs; 44% 25-34 yrs; 46% 35-54 yrs; 48% 55+ yrs).

Attitudes towards cycling and walking are shown on presentation slides 23-29



6 Summary & recommendations

CYCLING

On a positive note, total campaign recognition of the ‘*Cycle Instead*’ slogan has significantly increased from 21% in 2000 to 56% in 2005, which shows that the net reach of the campaign continues to reach a growing portion of the population. The main message of the slogan, that cycling is a viable alternative to short car journeys, is well communicated, both spontaneously (53%) and when prompted (79%).

Across the cycling measures there has not been a lot of movement in terms of the two key measures of the number of people who own a bicycle, or those who have cycled in the past six months. Of those who have cycled in the past six months, a greater proportion is now likely to cycle more frequently than ‘occasionally’, when compared with previous results.

Across the key cycling measures, those under 55 years of age were consistently more likely to:

- be aware of the ‘Cycle Instead’ slogan and the main messages of the campaign;
- own a bicycle or intend to purchase a bicycle;
- have cycled in the past six months;

but less likely to:

- be negatively disposed to taking up cycling in the next six months.

These key measures are outlined below, showing comparison by age group.

	TOTAL	AGE			
		18-24 years	25-34 years	35-54 years	55+ years
Base: All respondents	403	44	73	160	126
	%	%	%	%	%
Spontaneously aware of “Cycle Instead”	7	18	15	6	1
Prompted recognition of “Cycle Instead”	59	59	63	48	40
Spontaneously mention that “Cycle Instead” communicates “cycle instead of using car for short journeys”	53	65	53	56	41
Own a bicycle	50	59	53	57	36
Intend to purchase a bicycle	3	4	10	2	1
Have cycled in the past six months	30	36	44	29	20
Base: Non-cyclists	283	28*	41	113	101
Less likely to say no intention of taking up cycling	62	43	51	58	77
Less likely to say that they are prevented by health	12	-	5	12	19
Less likely to say that they are too old to cycle	12	-	-	1	33

As highlighted above, it is evident that there are significant differences in attitudes and behaviours towards cycling, exhibited by those over 55 years of age. It is therefore suggested that DPI consider focusing the 'Cycle Instead' campaign so that its messages are directly targeted to those under 55 years of age, altering the research to reflect these changed parameters.

The rationale for this is that the younger age group is more likely to respond to the messages communicated in the campaign and have a positive disposition towards taking up cycling. Those over 55 years of age are more likely to say that they are '*prevented by health*' or consider themselves '*too old*' to cycle, and are considerably less likely to intend to start or to increase their cycling activities. It is suggested that perhaps alternative exercises, such as walking, would be a more appropriate and appealing activity to promote to this age group.

Currently, half of all respondents own a bicycle, and half of those again, have cycled in the past six months. Thus, there are two clear and obvious strategies to increase cycling:

- increase the number of people who have or own a bicycle; and/or
- convince those who currently have a bicycle to cycle more.

➔ **For both of these key measures, those under 55 years of age will be easier to convince to undertake or increase their cycling activities.**

If the DPI Cycling Unit were to redefine the target age group for the 'Cycle Instead' campaign to those under 55 years, it would also be important to reconsider the sample included in the survey. Currently, 31% of the sample is aged over 55 years, thus if this age group was removed from the existing sample of n=400⁸, there would be more respondents within the 18-24 year and 25-34 year age groups, allowing greater in-depth analysis of key drivers, and barriers⁹.

⁸ *There may be some cost implications associated with doing this, as it necessitates screening unsuitable respondents from the survey sample.*

⁹ *However, the other implication of this would be that tracking figures would not be comparable without readjustment of the bases.*

Other strategies that have been highlighted in the research as possible motivators to increase cycling behaviour include:

- Leveraging the fitness benefits and health improvements of cycling, which are consistently mentioned as being both a personal incentive and reason that people in general might consider starting or increasing their cycling activities.
- ⇒ **... greater liaison between the Department of Health and the Department of Sport and Recreation, might well provide increased opportunities to promote the idea of increasing levels of physical activity, through cycling, directly linked to the health and fitness benefits.**
- The workforce travelling to work, and students travelling to their place of education are in the target age group (ie under 55 years of age), and the vast majority 'agree' that cycling is a viable alternative to driving short distances. This group also represents heavy users of cars, with 81% relying on driving themselves to and from their place of work/education.
- ⇒ **... cycling, as an alternative transport mode for travelling to places of work and education, is something that could be further promoted. Strategies to encourage potential cyclists to consider making the change by substituting cycling for car journeys could also be considered. One potential 'hook' to start them moving towards making the decision could be to focus on the cost savings (ie rising fuel costs and parking) to make people reassess the viability of cycling to their own place of work/education.**
- Those who are cyclists¹⁰ or personally own a bicycle were more likely to say that '*Cycle Instead*' communicated it was '*good for the environment*'. Although of all respondents only a small proportion spontaneously mentioned that cycling was '*environmentally friendly*' as a motivator, it is suggested as an area that could possibly be further explored.
- ⇒ **... the DPI Cycling Unit could focus on the positive environmental effects of cycling, linking with other governmental environmental agencies to promote further benefits of cycling.**

To further explore cycling behaviours within the community within particular age groups and determine the 'drivers' to cycling behaviour, it is suggested that conducting qualitative research with key targets groups would provide valuable input into the campaign strategy and promotion of the '*Cycle Instead*' campaign.

It is also recommended that in 2006 the tracking research be conducted in April, immediately after the 'Bike Week' campaign as respondents will have better recall. This will record more accurately, the 'peak' cut-through achieved by the campaign before the results begin to decay over time.

¹⁰ For the purpose of this survey, a cyclist is defined as a person who has cycled in the last 6 months.

WALKING

Walking is a general activity that can be defined in a number of ways. The DPI Walking Unit has framed the questions in this questionnaire in terms of walking as a suitable substitute to short car journeys.

Although there was minimal spontaneous recall of the '*Walk There Today*' campaign, and only one in ten (9%) recognised the campaign when prompted, this was not surprising given the timing of the research in April, and the promotion of the '*Walk There Today*' campaign in the previous November.

Attitudes towards walking short distances as a substitute for driving short distances were very positive (66% strongly agree, 84% agree). Females were more likely to '*strongly agree*' that walking was a suitable alternative for short car journeys than were males.

Positively, there has been a notable increase (at the 90% confidence level) in those who have substituted a short driving journey with walking at least once in the last week (53% 2004 vs. 59% 2005). The most frequent short walking journey was to the shops, which was more likely to be mentioned by the younger age groups, in particular those aged 25-34 years, than by those who were older.

Notably there were significant differences between age groups in the main reasons for walking. Older respondents were more likely to mention '*general exercise*' and '*health reasons*' as the main motivators for walking than were younger respondents. Those aged 25-34 years were more likely to say that they walked for '*recreational and leisure purposes*', than were other age groups. Younger respondents, particularly those aged 18-24 years, were more likely to say that they walked to '*save on fuel*', than were older respondents.

There has been a significant decline in the proportion of those who do not currently walk, who gave the reason that they '*didn't have enough time*', as a barrier to walking. Similarly, there was also a significant decline in those saying that '*having more time*' would be a motivator to increase their walking behaviours. Thus, it appears that perceptions have changed about the amount of time needed to exercise, and this shift in opinion could be a result of the promotion of the '*Find Thirty*' campaign.

Around one in ten (8%) mentioned that '*having someone to walk with*' would motivate them to increase their walking behaviour. Further, when asked if they would be interested in joining a walking group if there was in their local area, just under a third of all respondents said that they were interested. In particular, females and those in the older age groups (ie over 35 years) were most likely to be interested in joining a local walking group.

In terms of developing strategies to promote walking, it is important to determine what the focus of the campaign is from an organisational perspective:

- Is the primary purpose of promoting the activity of walking simply to substitute for short car journeys?; and/or
- Is it to increase walking behaviours for other reasons, such as for recreation purposes and / or associated health benefits, which are mentioned more often by respondents in the older age groups?
- ⇒ It is important to consider the age differences between these strategies - younger people walk more often to a destination that can be substituted with a short car journey, whereas older people are walking more often for general exercise.
- ⇒ Currently, the *'Walk There Today'* campaign and slogan communicate both messages well - primarily that walking is *'good for health and wellbeing'*, and secondly, *'walk instead of using a car for short journeys'*.

The questions that were developed for the walking survey were formulated based on the format and style of the cycling questions with no real insight into the reasons why people may consider walking. In short, very little is known about the inner workings and motivations of 'substitute walkers', or the factors that go into the decision about whether to walk or drive.

Different motivators require different strategies. We therefore recommend further qualitative research to investigate whether and / or how people can be encouraged to increase their level of walking activity ie. which messages have the most potential to change behaviours..

This would provide the department with a greater understanding of the reasons why people do or don't walk instead of driving, what factors would make people consider walking more often, and how people decide when to substitute walking. Each of these issues could be explored across different population segments, to more clearly refine and focus the strategy for the *'Walk There Today'* campaign.

With regard to the earlier recommendation for the Cycling Unit to refocus on the 55 and under age group, that strategy is not recommended for the walking campaign. Thus, if the Cycling Unit were to adjust its focus for both its communication strategy and this research, the annual survey that is conducted could not be used for the two purposes it currently serves.

**APPENDIX A
QUESTIONNAIRE**