

**TRACK OF CYCLING
BEHAVIOUR AND
ATTITUDES**

A RESEARCH REPORT

Prepared For:

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1 Background to the research

The Department for Planning and Infrastructure 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 Australians involves encouraging an environmentally friendly transport future. The Metropolitan Transport Strategy (1995) aims to increase the proportion of journeys made by bicycle in Perth from 5.7% in 1991 to 8% by 2010 and 11.5% by 2029. As such, the Cycling Unit at the DPI is focussing on essentially two strategies to increase the proportion of journeys made by cycling:

- Increasing the number of people who own a bicycle; and / or
- Increasing the number of journeys made by bicycle.

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

- Events, such as "Bike Week" and "ride to work";
- Brochures and materials; and
- Limited advertising on radio and in newspapers.

To monitor the effectiveness of its cycling campaigns and initiatives, the Department commenced an annual tracking survey in 1999. The survey examines changes in behaviour, attitudes and intentions in respect to cycling and cyclists. The Department wishes to continue to monitor cycling related changes in the behaviour, attitudes and intentions to cycle in Western Australia.

1.1. Research objectives

The **primary objective** of the research is to monitor longitudinal changes in cycling behaviours, attitudes and intentions that have been established by the benchmark survey and follow-up surveys conducted in the seven years since its inception.

The desired outcomes of the research are two fold:

1. to provide quantitative data upon which the Cycling Unit can assess the effectiveness of programs such as the *Cycle Instead* campaign; and
2. to assist the organisation to identify additional strategies to address its defined program goals, thereby making the program more targeted.

However in 2007, the campaign measures were (temporarily) removed due to reduced media activity, and instead, an additional measure was inserted to explore attitudes in more detail and to provide the facility to conduct regression analysis in the future.

The specific **information objectives** of each wave of research have been and continue to be:

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.
2. To record the *types and condition of bicycles* in the household (amongst owners).
3. To measure how many respondents have undertaken cycling activities in the *past six months*.
4. To record the *frequency, distance and purpose* of cycling trips undertaken.
5. To understand the *level of change in cycling frequency* over the past six months and any intended change in the coming six months.
6. To measure the *intention to purchase* a bicycle by current non-owners.
7. To examine the *reasons why non-users have not cycled* and to gauge their intention to commence cycling in the future.
8. To examine *incentives for current non-users* to take up cycling (i.e. what would make them want to cycle). These include both personal (e.g. the desire to get fit) and structural (e.g. more local cycle paths) aspects.
9. To assess general *attitudes towards cycling and cyclists*.

The **final objectives** relate to ongoing campaign and program evaluation.

10. To record the proportion of respondents who are *aware of the campaign*.
11. To identify where respondents had *heard about the campaign*.

As noted above, these last two objectives will not be addressed in this wave of research.

2 Methodology

Similar to previous tracking conducted in 2003-2006, 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. However, as the survey was not conducted in 2006, it has now further reduced to biennial.

2.1. Sample characteristics

A total of **401 interviews** were completed. Sampling was random and gender quotas were imposed. Potential respondents were contacted via random telephone number dialling to ensure 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 calls back 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 11.4 minutes. All fieldwork was undertaken by SurveyTalk fieldwork team.

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

Table 2.1 Sample Characteristics

	April 2003	April 2004	April 2005	April 2007
	n=400	n=400	n=403	n=401
Age	%	%	%	%
18-24 years	11	10	11	9
25-34 years	18	16	18	15
35-54 years	40	42	40	41
55 years	31	32	31	34
Gender				
Male	50	50	50	50
Female	50	50	50	50
Bicycle ownership				
Bicycle owner	52	50	50	54
Do not own bicycle	48	50	50	46
Cyclists ¹	35	29	30	31

¹ A 'cyclist' is defined as a person who has cycled in the last 6 months.

2.2. Questionnaire

In preparation for possible future regression analysis, changes were made to the questionnaire. In order to undertake regression analysis, the dependant variables need to be measured on a continuous scale. An additional question was included in 2007 (Q16) to better capture attitudes towards cycling. Utilising regression analysis on the new Q16 will, it is hoped, help to identify which factors actually have the most impact on propensity to cycle, in contrast to the reasons stated by respondents.

The cycling 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 to 2006 results would provide a baseline measure.

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

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**
- **Cyclists: those who have cycled in the last 6 months, and those who have not**
- **Cycling segmentation: 'Positive Conformists', 'Immediate Potentials', 'Positive Persuadables', 'Forced Behaviour' and 'Concept Rejecters'.**

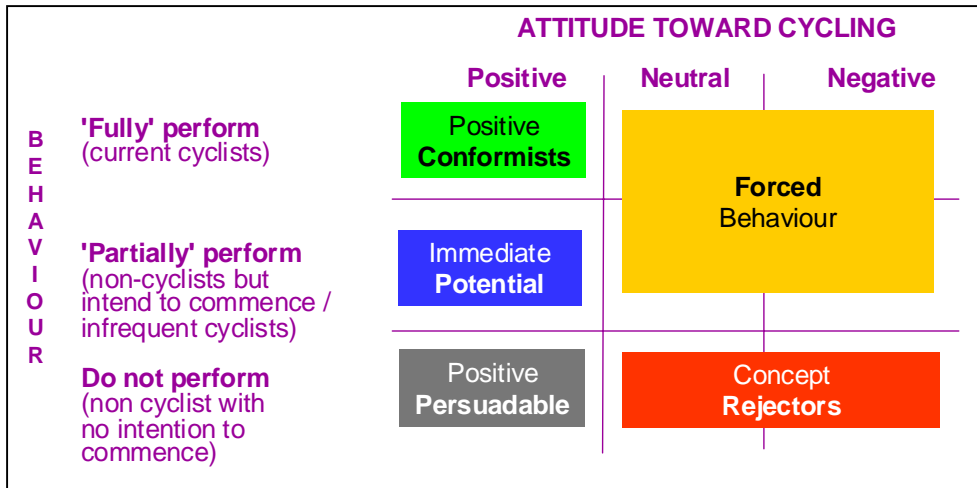
The segmentation analysis is further explained in the following section.

2.4. AAB segmentation

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, 9a and 18 (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 18: 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 9a: Respondent was not currently cycling, but cited an intention (i.e. “6” or above) to take up cycling in the next 6 months.

Question 18: 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 9a: Respondent expressed little intention (i.e. "5" or below) to take up cycling in the next 6 months.

Question 18: Respondent "agreed" or "strongly agreed" with the statement that "*cycling is a viable alternative to driving your car over short distances*"

Concept Rejecter

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 9a: Respondent cited little intention (i.e. "5" or below) to take up cycling in the next 6 months.

Question 18: Respondent was "neutral", "disagreed" or "strongly disagreed" with the statement that "*cycling is a viable alternative to driving your car over short distances*".

Forced Behaviour

This segment had two groups of respondents :

(1) those who had a negative attitude towards cycling, but were currently cycling

(2) those who had a negative attitude towards cycling, who were not currently cycling

Both of these segments indicated some intention (i.e. "6" or above) to take up cycling in the next 6 months.

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

Question 9a: Respondent was (or was not) currently cycling, but cited an intention (i.e. "6" or above) to take up cycling in the next 6 months.

Question 18: Respondent was "neutral", "disagreed" or "strongly disagreed" with the statement that "*cycling is a viable 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 (i.e. statistically significant) and those that are not (i.e. 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.

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).

Over half (54%) of all respondents said they personally own a bicycle. There has been a non-significant increase in this measure since April 2005 but it is at a record high since October 2001.

- Those aged over 55 years continue to have the lowest rate of bicycle ownership at 37%, compared with younger age groups (of which 60% or more own bicycles).
- Bicycle ownership amongst respondents aged 25 to 34 years has substantially increased from 53% in 2005 to 61% in 2007. For those aged 18 to 24 years there has been a similar increase in the number of respondents who own a bicycle, with 59% in 2005 going up to 67% in 2007.

Forty six percent of respondents said they did not own a bicycle (including the 4% who said they intended to purchase).

This measure is depicted in presentation slide 13.



Respondents were also asked how many bicycles in their household could be ridden by members of their household right now (Q19).

Of those respondents who had a bicycle(s) in their household, 12% of those bicycles were not roadworthy. A further 46% do not own bicycles making the total 58% who currently do not have the physical resources to cycle.

- Respondents over 55 years of age were less likely than younger respondents (ie under 55 years) to have bicycles in their households (50% versus 20% respectively).

One in six (16%) households had one bicycle, a further 21% had two; 13% had three and 9% had four bicycles that could be ridden now. Around 8% had more than four bicycles in their household that could be ridden now.


- There was a greater propensity for current cyclists² to have more than one bike their household.

² For the purpose of this survey, a current 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).

Almost half of respondents **48%** who **owned a roadworthy bicycle said that they could ride their bicycle immediately**, a small increase from 44% in 2005. 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 (88%).

This measure is depicted in presentation slide 16. 

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

Mountain bicycles remained the most common type of bicycle owned (46% 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 (51% vs 28% respectively).

The ownership of *normal* bicycles has slightly increased from 11% (2005) to 15% (2007).


- As could be expected, those aged over 55 years (27%) were more likely to prefer *normal* bicycles than were those aged under 55 years of age (9%).

One in eight respondents (12%) mentioned they owned *racer* bicycles.

- *Racer* bicycles were more likely to be owned by males (15%) than they were by females (9%), as were *cross/hybrid/comfort bicycles* (13% males, 5% females).

Females were more likely to say that they *didn't know* what sort of bicycle they owned or intended to purchase than were males (14% vs 5% respectively), and this has remained consistent over all the previous waves.

It was noted in 2005, that one in seven (14%) mentioned they prefer *Brand name* bicycles, and only 2% indicated a *brand name* bicycle in the most recent wave.

All bicycle types are shown on presentation slide 17. 

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).

Of respondents who did not currently own a bicycle, 8% said they intended to purchase a bicycle in the next 6 months, which is equivalent to almost 4% 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 (0% of 18-24 yr olds; 8% of 25-34 yr olds; 5% of 35-54 yr olds; 2% of 55+ yr olds).
- In 2007, a larger proportion of respondents aged 35-54 year olds said they intend to purchase bicycles (13%), whereas only 4% said this in 2005.

Intention to purchase a bicycle is shown on presentation slide 15



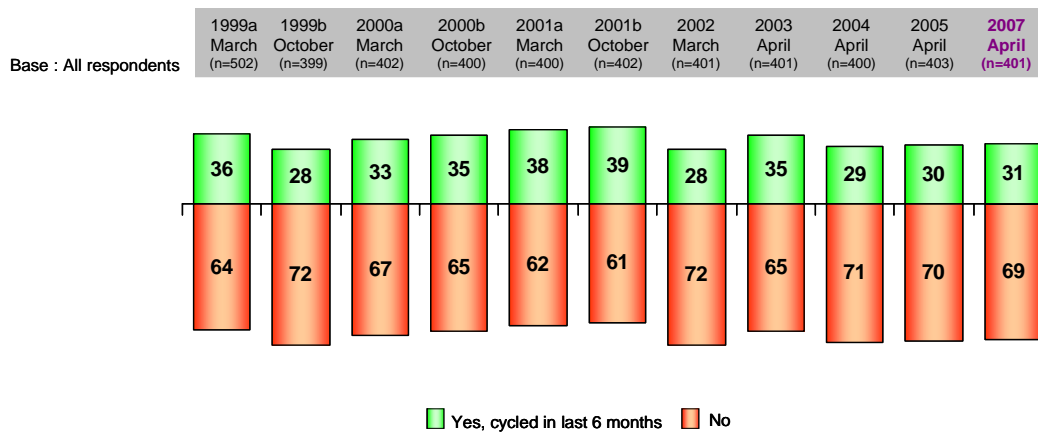
3.2. Cycling frequency, distance, time and purpose of trips, and intention to increase behaviour

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 (31%) respondents said they 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 (27%) who had cycled in the past 6 months remained significantly lower than the proportion of males (36%).
- Those aged 25-54 years were more likely than those who were older than 55 or younger than 25 years, to have cycled in the previous six months (30% 18-24 yrs; 44% 25-34 yrs; 38% 35-54 yrs; 17% 55+ years).
- Not surprisingly, those who owned a bicycle were more likely to have cycled in the previous six months than were those who did not own a bicycle (55% and 3% respectively). Conversely, half of those who did own a bicycle had not cycled in the previous six months (45%) compared with nearly all of those who did not own a bicycle (97%), confirming the obvious - that owning a bicycle is a prerequisite to undertaking cycling.

Subgroup differences are shown in presentation slide 19

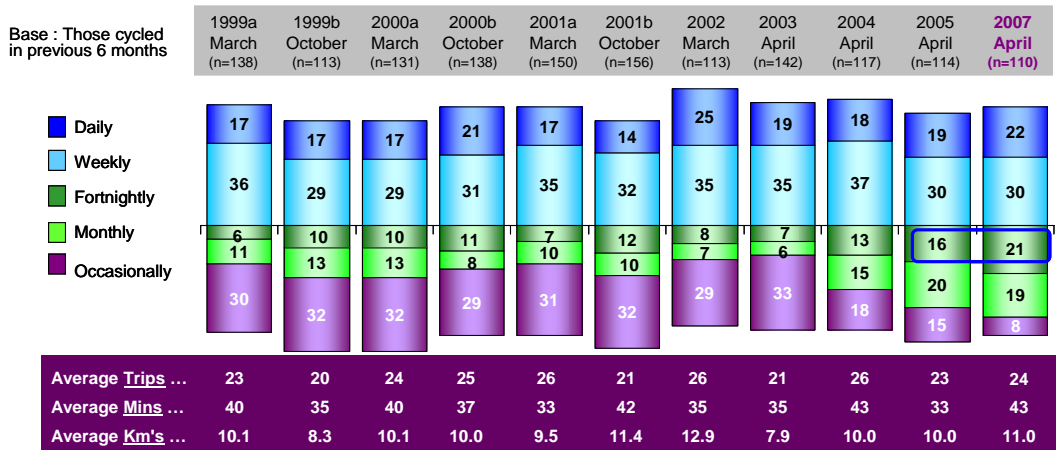


Objective 4: To record the frequency, distance, time and purpose of cycling trips undertaken

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) (Q6). They were also asked what their average cycling time was for a single trip (Q8a), how often they made this trip in the last month (Q8b) and how many kilometres they thought they had travelled (Q8c).

It is important to note that there was a change in the way these questions were asked in 2007 (to prepare for regression analysis). In previous years each of these questions had a read out scale, whereas in 2007 respondents were asked to give a number. Further detail about these changes is given in presentation slide 22.

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



Among those who had cycled in the previous 6 months, over half were cycling 'weekly' or more often (52%). One in five cyclists (22%) cycled 'daily'. Overall, no significant increases were observed over the 2005 results, however there has been a continual increase since April 2003 in the proportion of respondents who said they cycle 'fortnightly' (7% in 2003 up to 21% in 2007) or 'monthly' (6% in 2003 up to 19% in 2007), and a corresponding decline in those who said 'occasionally' (33% in 2003 down to 8% in 2007).


Over the time since the survey commenced, there has been some fluctuation in terms of the number of trips, the distance and time taken. In 2007, the average number of cycling trips was 24 (one way trips), with an average duration of 43 minutes, over a distance of 11.0 kilometres.

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

- general exercise (49%);
- recreational or social purposes (29%);
- to get to school or work (12%); and
- to a friend's place or the shops (5%).

Around half of cyclists (49%) said that the main reason they cycled was for 'general exercise'. This is the highest score since October 2000 when the number reporting this was 40%. Correspondingly, the proportion who said they cycle for 'recreational / social purposes' has significantly declined from 59% in 2005 to 29% in 2007.

Reasons, frequency, time and distance of trips are shown on presentation slides 22-24




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 (Q7), and whether they intended to increase their cycling behaviour in the next 6 months (Q9b).

There has been a slight increase in the proportion of respondents asserting that their cycling behaviour had remained the same over the previous six months (54%), compared with the six months prior to that, a record high for this measure. A similar result was recorded in the number of respondents who said they intended to continue cycling to the same degree in the next six months (58%).

- Females (33%) were more likely than males (22%) to say that they intend to increase their cycling behaviour in the next six months.
- Those who were aged 24 or under were more likely than those who were older to mention having increased in their cycling level in the previous six months, compared with the six month prior to that (36% and 25% respectively).
- No other meaningful subgroup differences were evident.

Changes in cycling behaviour is depicted on presentation slide 25



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 (Q13a/b).

The reasons why non-users have not cycled included:

- 'lack of time' (33%),
- 'do not want to' (27%),
- 'no bicycle' (19%),
- 'too old' (15%),
- 'prevented by health' (10%),
- 'other transport is quicker and easier' (8%),
- 'lack of energy' (6%), and
- 'do not enjoy' (6%)


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

BARRIERS TO CYCLING - ALL REASONS						
BASE: Not cycled in prev. 6mths	AGE				OWN BIKE	
	18-24yrs	25-34yrs	35-54yrs	55+yrs	Yes	No
	%	%	%	%	%	%
Lack of time	40	60	41	17	48	26
No bicycle	21	26	16	18	3	27
Too old	-	-	4	32	4	2
Lack of energy	12	3	5	7	9	4
Prevented by health	-	8	9	14	10	10
Do not want to	27	27	26	29	25	29
Other transport quicker/easier	9	9	12	5	9	8

- 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' (48% vs. 26% respectively), although this is hardly surprising since the biggest reasons given by those who did not own a bicycle for not cycling was that they 'didn't own a bicycle' (27% vs 3% respectively), and that they 'do not want to' (29% vs 25% respectively).
- Younger respondents (i.e. those under 55 years) were more likely than respondents aged 55 or over, to say their reasons for not cycling were 'lack of time' and 'no bicycle'.

- However, older respondents (i.e. those 55 years or over) were more likely than younger respondents to mention *health reasons* (14%) for why they did not cycle. In addition they also considered themselves to be *'too old'* (32%).
- Interestingly, those aged 18-24 years were more likely than older respondents to give the reason *'lack of energy'* (12% vs. 7% respectively) for why they hadn't cycled.
- Overall, a greater proportion of respondents were more likely to say the reasons for not cycling were they simply *'do not want to'* (27%) significantly more than the 11% who said this in 2005.

This measure is depicted in presentation slides 26-29.



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 (Q17). These responses are referred to in the text as **'structural'** motivators.*

The strongest **personal** incentive for people who are not currently cycling but may take it up was said to be *'exercise and fitness benefits'*. For 39% this was the main (or first mentioned) personal incentive; and across the sample more generally, 10% nominated it as a reason why others may cycle. This factor remains to be the strongest personal incentive, and received an increase from the previous year 28% (2005) compared with 39% (2007), a record high since the peak result recorded in March 2001, when 50% of respondents mentioned it as a main personal incentive. This represents a small recovery from the decline in October 2001. This decline was due to the introduction in April 2003 of a new code *'health improvements'*. This new code separated the health improvement aspects out from the more general *'fitness benefits'*. More recently however, the proportion of respondents mentioning *'health improvements'* has decreased for both personal incentives as well as a motivator attributed to others; 5% in 2007 down from 10% in 2005 for the main personal incentive; but remains at 4% in 2007 for others.

Whilst factors such as *'more cycle paths'* (36%), *'better cycle paths'* (30%) and *'better and safer roads'* (32%) were rated highly as factors that might encourage others to cycle, *'safer/decent cycle paths'* were, in contrast, considered substantially less important as personal incentives for those who might take up cycling with only 3% mentioning it as the main personal incentive, and only 7% across all personal incentives.

Notably there was a significant increase in the number of respondents claiming that *'better cycle paths'* would increase the up-take of cycling, from 14% in 2005 up to 30% in 2007.

- Of note, current cyclists³ were more likely to mention '*better cycle paths*' than were non-cyclists (34% vs. 28% respectively).

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

There was no change in the number of respondents mentioning the '*increase in petrol prices*' as a reason why people might consider taking up cycling, with this result remaining at 10%.


- Surprisingly, *petrol prices* were more likely to be mentioned by 35-54 years olds than younger respondents (8% 18-24 yrs; 5% 25-34 yrs; 13% 35-54 yrs; 10% 55+ years).

Around one in ten (9%) said that they would take up cycling for a '*recreational/leisure activity*' as a personal incentive whereas only 3% mentioned it as a reason why others might.

Various *end-of-trip facilities* recorded low mentions as incentives, for example '*bicycle storage*' (4%), similar to '*workplace facilities*' (4%). 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 probably achieve significantly higher mentions.

Other personal incentives

One in twelve (8%) mentioned that the '*lack of public transport/unreliability of transport*' might prompt them to take up cycling.

Structural and personal incentives to cycle are shown on presentation slides 30-32 

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

3.4. Attitudes towards cycling

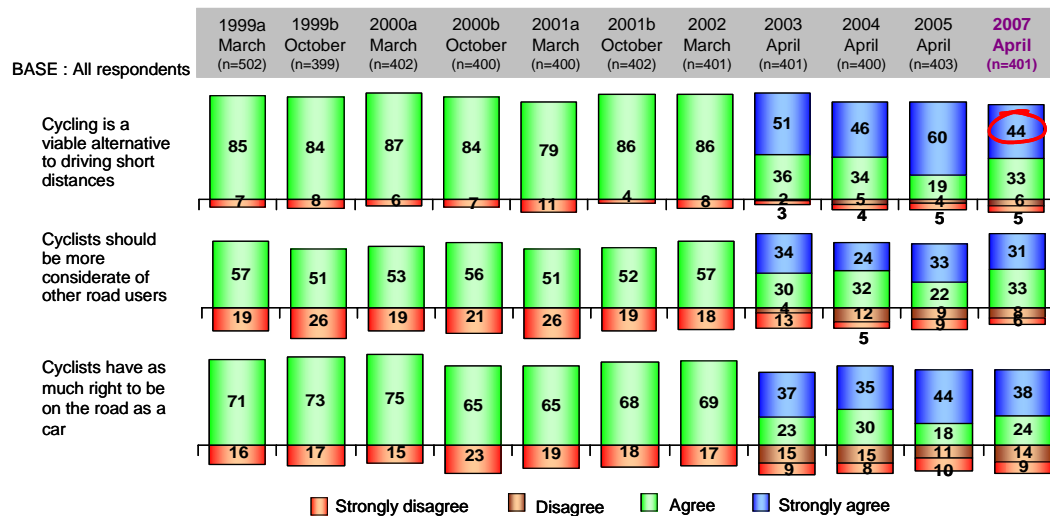
Objective 9: To assess the general attitudes towards cycling and cyclists

Respondents were prompted with a series of statements about cycling and asked to rate their level of agreement, or disagreement with each (Q18).

In 2007, the vast majority (77%) continued to 'agree' to some extent that 'cycling is a viable alternative to driving short distances', which is comparable with the previous year results (79% 2005). However, there has been a consistent decline from the peak recorded in 2003 (87%), which has not been attained since. Notably in 2007, there has been a significant decrease in the proportion of respondents who 'strongly agree' that cycling is a viable alternative to driving over short distances, from 60% (2005) to 44% (2007).

- Females were more likely than males to 'agree' that cycling was a suitable alternative to driving over short distances (80% vs. 74% respectively).
- Those classified as 'Forced Cyclists' were less likely to 'agree' that cycling was a suitable alternative to driving over short distances compared with the other ABB segments (100% Conformists, 39% Forced, 100% Persuadables, 100% Potentials).

Figure 3.4a Attitudes to substituting cycling for short car journeys



Notably, there has been a significant increase in the proportion of respondents who 'agreed' that 'cyclists should be more considerate of other road users', 64% (2007) compared to 55% (2005). This represents an increase over the 2003 result of 56%.

- Females were more likely than males to 'strongly agree' that cyclists should be more considerate of other road users (34% vs. 28% respectively).

- Interestingly, those who own a bicycle compared to those who didn't (37% vs. 29% respectively), were more likely to 'agree' (although not 'strongly') that cyclists should be more considerate of other road users.

While the majority of respondents (62%) 'agreed' that 'cyclists have as much right to be on the road as a car', representing no change from the previous year results which were also 62%, there has been a small increase in the proportion who 'agree' (24% vs. 18% 2005), and a corresponding decline in the proportion who said they 'strongly agree' (38% vs. 44% 2005).

- Those aged 25-34 years were more likely to 'agree' that cyclists have as much right as a car to be on the road (59% 18-24 yrs, 68% 25-34 years, 61% 35-54 years, 61% 55+ years).

Attitudes towards cycling are shown on presentation slide 33 

All respondents were asked to rate a list of statements about what factors would affect their decision to cycle in the next six months (Q16). NEW QUESTION

Around two fifths of the proportion of respondents said '*having good cycle paths in your area*' (41%), '*improving your fitness*' (40%), '*enjoying cycling*' (40%), and '*level of confidence riding a bike*' (37%) would affect 'a lot' their intention to cycle in the next six months.

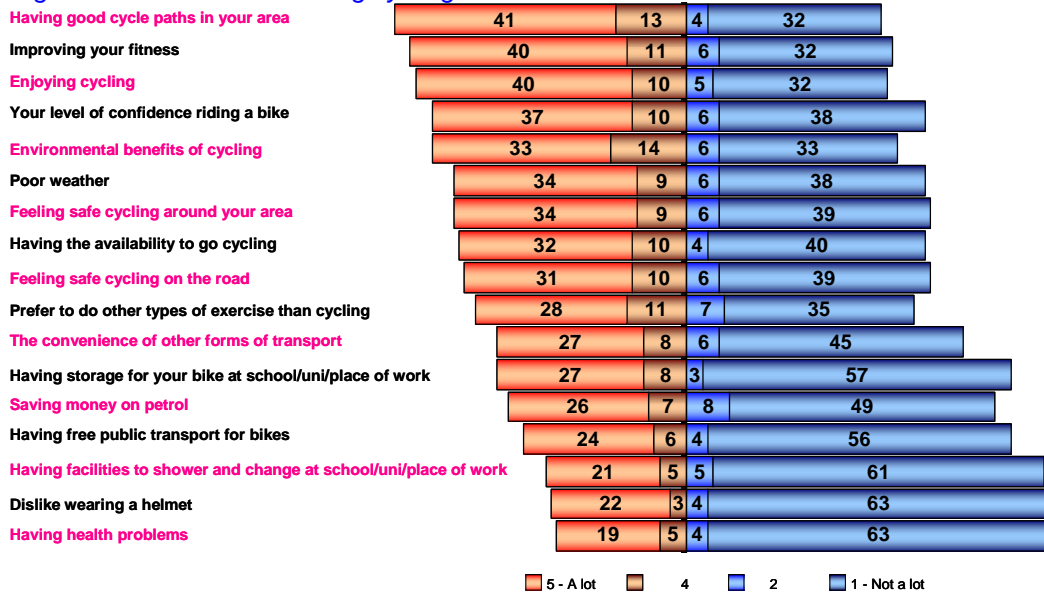
- Females were significantly more likely than males to be influenced by the following factors (% saying 'a lot' i.e. scores 4 and 5):
 - > *Health problems* (28% females and 19% for males)
 - > *Convenience of other types of transport* (38% females and 31% for males)
 - > *Poor weather* (46% females and 40% for males)
 - > *Feeling safe on the road* (44% females and 38% for males)
 - > *Feeling safe in the area* (45% females and 40% for males)
- ...whereas males were significantly more likely than females to be influenced by the following factors (% saying 'a lot' i.e. scores 4 and 5):
 - > *Confidence level* (52% for males and 41% for females)
 - > *Shower and change facilities* (29% for males and 23% for females)
- Those aged 55 and over were least likely to nominate any of the factors as affecting their decision to cycle i.e. each of the factors have less influence on this age group than on any other.
- Not surprisingly, those who were currently cycling⁴ were significantly more likely than those who were not to nominate all of the factors as having an influence i.e. all of the factors were more salient for current cyclists than they were for non-cyclists. The greatest differentials were recorded for the following factors (% saying 'a lot' i.e. scores 4 and 5):
 - > *Enjoyment of cycling* (77% for cyclists and 37% for non-cyclists)
 - > *Improving fitness* (74% for cyclists and 40% for non-cyclists)
 - > *Good cycle paths* (69% for cyclists and 47% for non-cyclists)

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

- > Confidence level (60% for cyclists and 40% for non-cyclists)
- > Poor weather (57% for cyclists and 37% for non-cyclists)
- > Feeling safe in the area (56% for cyclists and 37% for non-cyclists)
- > Having time (55% for cyclists and 36% for non-cyclists)
- > Confidence level (52% for males and 41% for females)

Interestingly, around one third of all respondents mention ‘the level of confidence riding a bike’ and the ‘environmental benefits of cycling’ would affect their cycling behaviour ‘a lot’.

Figure 3.4b Attitudes affecting cycling behaviour



4 Summary & recommendations

Across the cycling measures there has been a non-significant increase in the number of people who own a bicycle (50% up to 54%) (see slide 13).

Of those who have cycled in the past six months (31%), a greater proportion is now likely to cycle more frequently than 'occasionally', when compared with previous results (see slide 23).

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

- own a bicycle or intend to purchase a bicycle;
 - have cycled in the past six months;
- and more likely to:
- be positively 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	401	37	61	166	137
	%	%	%	%	%
Own a bicycle (Q10a)	54	67	61	64	36
Intend to purchase a bicycle (Q10b)	4	0	8	5	2
Have cycled in the past six months (Q4)	31	30	44	38	17
Propensity to say they have no intention of taking up cycling (Q9a – 0 scores)	49	38	34	42	68
Base: Non-cyclists (i.e. those who have not cycled in the last 6 months)	276	26	34	103	113
Less likely to say that they are prevented by health	10	0	8	9	14
Less likely to say that they are too old to cycle	15	0	0	4	32

Based on the results seen above, 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, just over half of all respondents own a bicycle (54%) but only 31% of all respondents have cycled in the past six months, leaving 23% with bicycles who have not cycled recently. 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.**

A third strategy is to begin to address those factors that have been identified as having a large impact on intention to cycle / take up cycling.

As proposed last year, it may be beneficial for the DPI Cycling Unit to redefine its focus onto those aged under 55. Currently, 28% of the sample is aged over 55 years, thus if this age group was removed from the existing sample of n=401⁵, there would be more respondents within the 18-24 year and 25-34 year age groups which would thereby allow greater in-depth analysis of key drivers, and barriers⁶ for this age group.

One implication of this however, would be that the results would not be comparable to previous years data, without re-running the data from previous years (i.e. removing the 55+ year olds from the sample). This would only be possible for the data sets we have available, and there would be a cost implication for the extra analysis.

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.

⁵ *There may be some cost implications associated with doing this, as it necessitates screening unsuitable respondents from the survey sample.*

⁶ *However, the other implication of this would be that tracking figures would not be comparable without readjustment of the bases.*

- ⇒ ... 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.
- ⇒ ... 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 again recommended that any future campaign tracking research be conducted **immediately after the 'Bike Week' campaign** as respondents will then have better recall. This will record more accurately the 'peak' cut-through achieved by the campaign before the results begin to decay over time.

APPENDIX A POWERPOINT SLIDES

APPENDIX B QUESTIONNAIRE