



Cycling and Walking Behaviour and Attitudes Track

Western Australia

- Prepared for: Department of Transport
- Client contacts: Ken Suttie, Alice Haning
- TNS Social Research Consultant: Paul Morgan
- Job No : 70062, May 2004



Report Outline

- **Divided into 8 sections**
 - **Demographics**
 - **Modes of Travel**
 - **Cycling**
 - **Walking**
 - **Campaign Awareness**
 - **Conclusions**
 - **Recommendations**
 - **Future Research**

Demographics

Current Wave		Previous
AGE	%	Wave 8 %
- 18-24 years	10	11
- 25-34 years	16	18
- 35-54 years	42	40
- 55 years	32	31
GENDER	%	%
- Male	50	50
- Female	50	50
BICYCLE OWNERSHIP	%	%
- Bicycle owner	50	52
- Do not own bicycle	50	48
WALKERS/CYCLISTS	%	
- Walker (Substitutes)	63	
- Cyclist	29	

Modes of Travel

Q3a/b What was the main (any other) method of transport used to travel to your workplace / place of education?

Chart: Methods of transport used to travel to workplace or place of education
Base: Respondents travelling to place or work or education

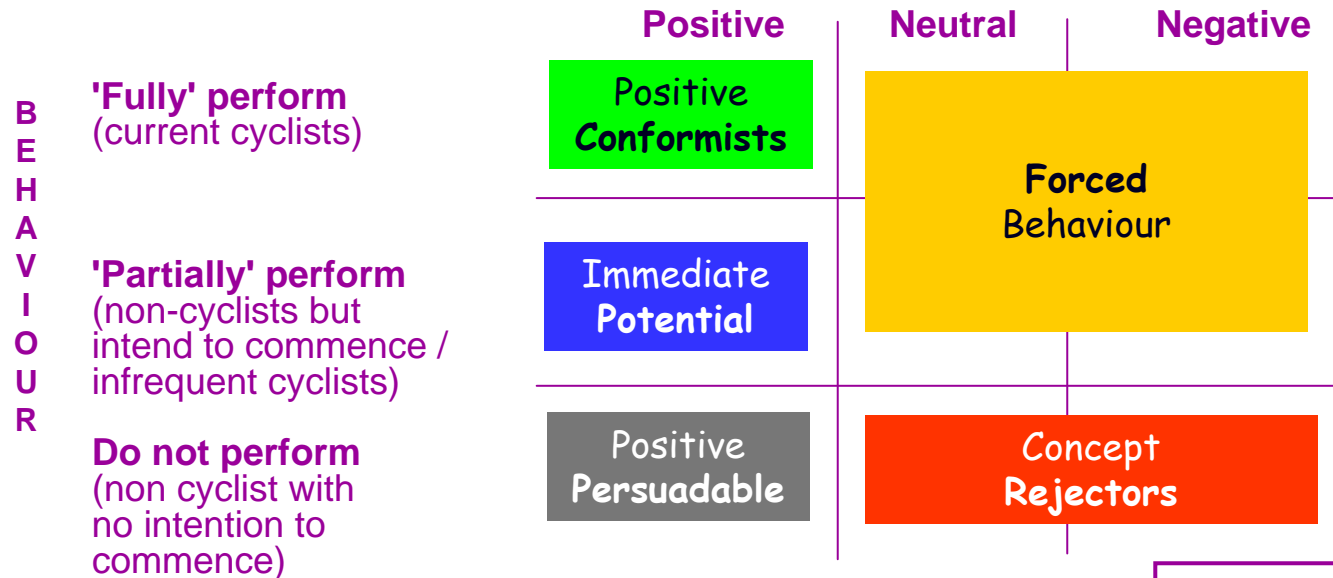
TRANSPORT METHOD	Wave 3 Mar '00 (n=251)		Wave 4 Oct '00 (n=268)		Wave 5 Mar '01 (n=261)		Wave 6 Oct '01 (n=271)		Wave 7 Mar '02 (n=259)		Wave 8 Apr '03 (n=256)		Wave 9 Apr '04 (n=256)	
	MAIN	ALL	MAIN	ALL	MAIN	ALL	MAIN	ALL	MAIN	ALL	MAIN	ALL	MAIN	ALL
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Own car (drive self)	76	84	80	88	80	87	69	76	75	78	73	81	83	88
Company Car	-	-	-	-	1	1	4	5	7	7	4	4	0	0
Car as passenger (get dropped off)	2	4	<1	3	1	2	2	3	2	4	1	3	2	4
Car pool	-	<1	1	1	-	1	-	-	-	2	-	-	-	-
Taxi	-	1	-	1	-	-	1	1	-	1	-	-	-	2
Motorbike	-	2	1	1	<1	1	1	1	1	1	1	3	2	3
Plane / Flying	-	-	-	-	-	-	-	-	<1	-	1	1	-	-
Bus (/ CAT bus)	7	18	7	16	5	12	10	17	6	12	9	16	7	15
Train	6	13	4	11	7	11	6	12	4	8	5	11	3	8
Cycle	4	8	5	11	4	7	5	12	2	6	3	7	2	5
Walk	3	6	2	8	1	4	3	7	1	7	2	3	2	5
Other	3	<1	<1	1	<1	1	-	-	2	2	1	1	-	-

Cycling

Cycling Segments

- Respondents were segmented* by their **attitudes to cycling** and their actual **cycling behaviour**.

ATTITUDE TOWARD CYCLING



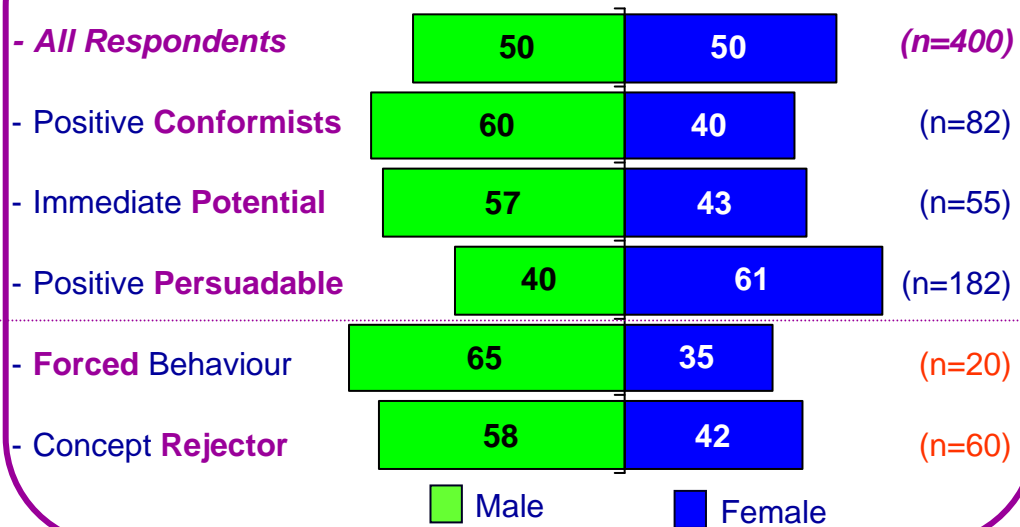
Sample Sizes

Positive Conformists	21%	(n=82)
Immediate Potential	13%	(n=53)
Positive Persuadable	46%	(n=182)
Forced Behaviour	5%	(n=20)
Concept Rejectors	15%	(n=60)

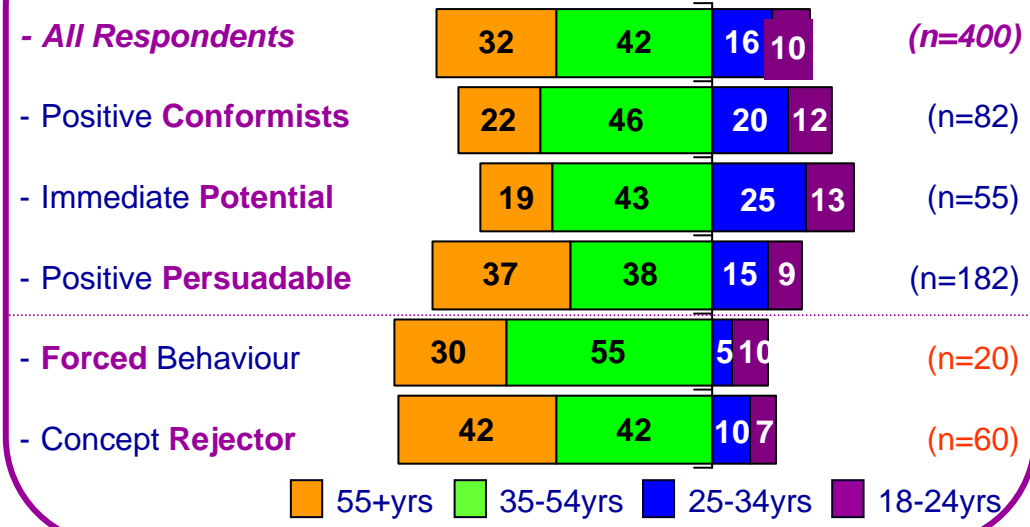
* The Attitude/Behaviour Model of segmentation was developed by Sheth and Frazier (1982)

Cycling Segment Profiles

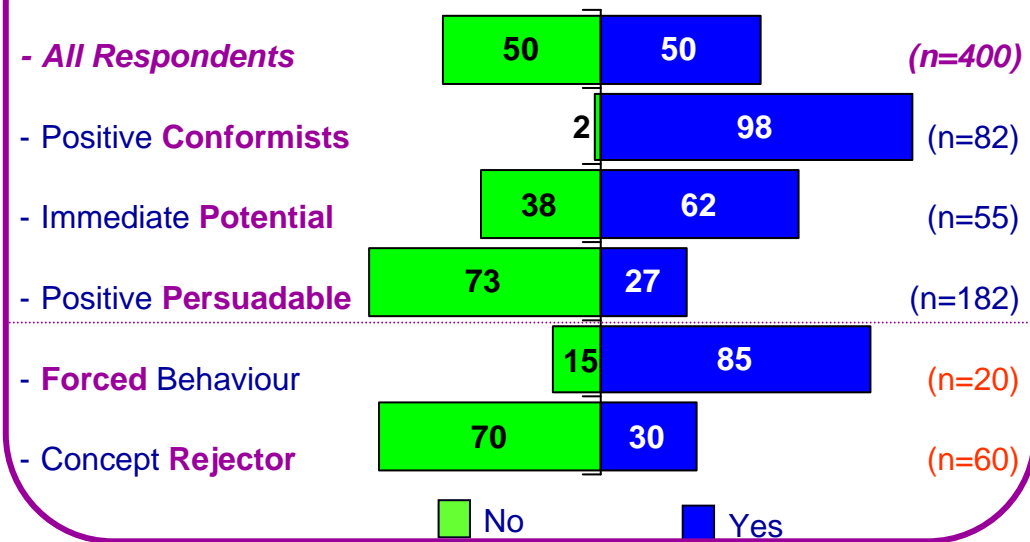
GENDER ...



AGE ...

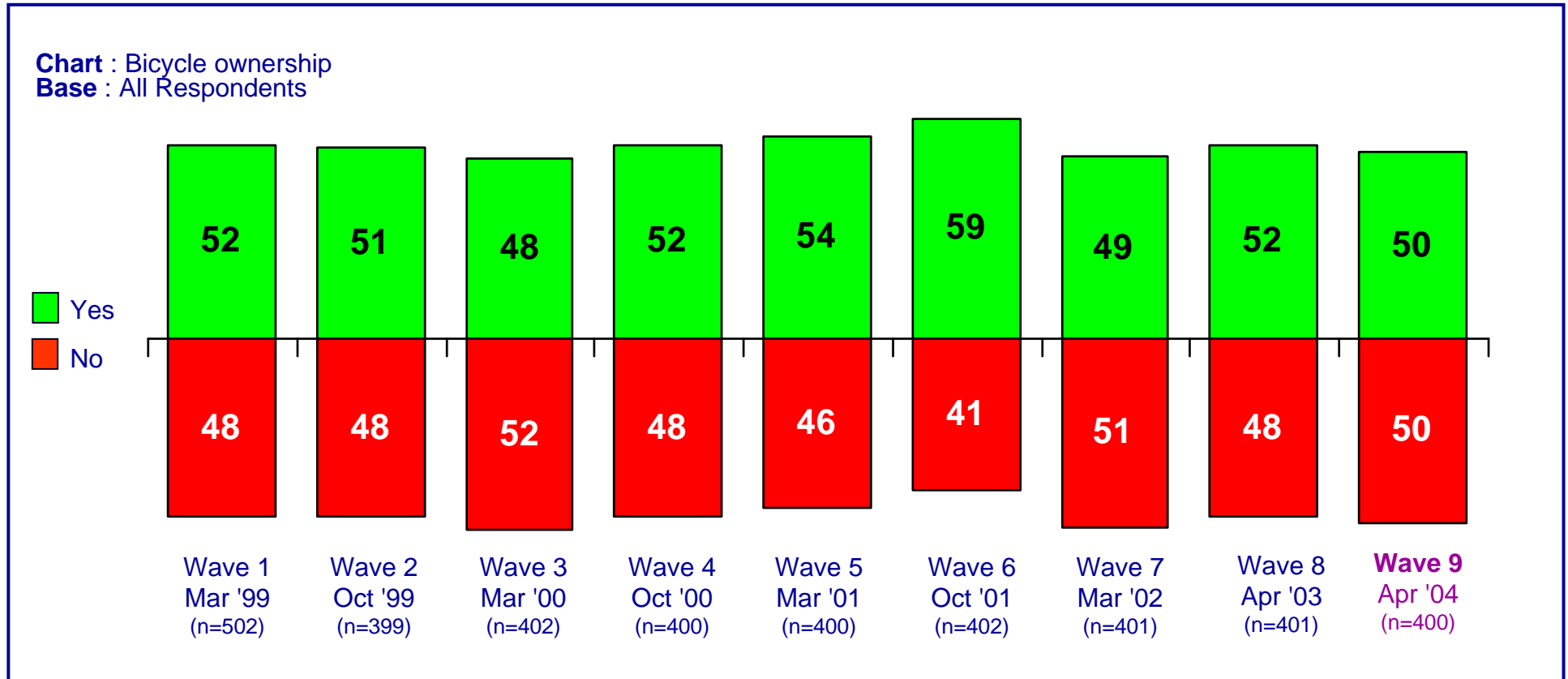


BICYCLE OWNERSHIP ...



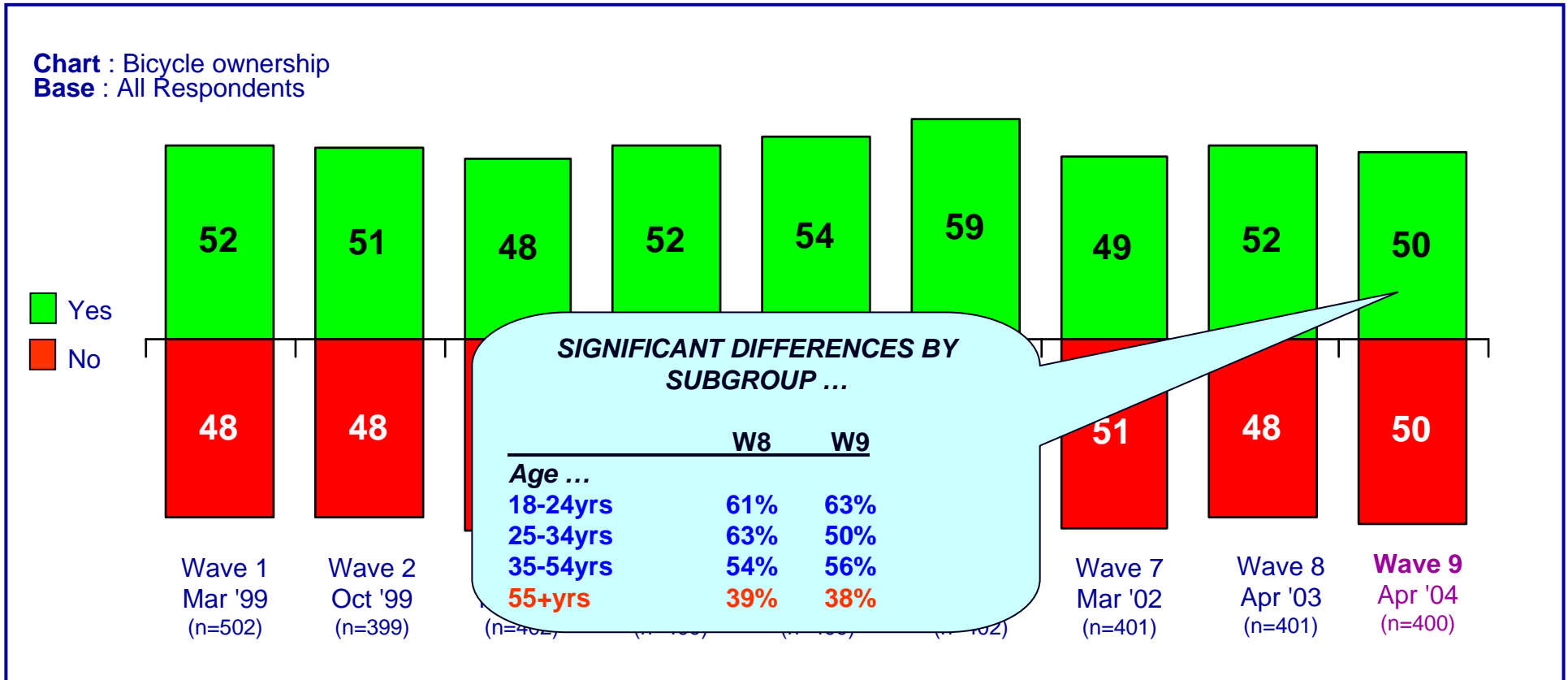
Bicycle Ownership

Q10a Do you own a bicycle?



Bicycle Ownership

Q10a Do you own a bicycle?



Bicycle Types

Q11a/b What type of bicycle do you intend to purchase? What type of a bicycle(s) is it?

TABLE: Type of bike owned	W1	W2	W3	W4	W5	W6	W7	W8	W9
BASE: Own or intend to purchase	Mar'99	Oct'99	Mar'00	Oct'00	Mar'01	Oct'01	Mar'02	Apr'03	Apr'04
	138	113	131	138	150	156	113	142	211
	%	%	%	%	%	%	%	%	%
Mountain Bike	49	49	48	63	58	62	62	60	54
Normal bike	n/a	n/a	n/a	n/a	n/a	n/a	n/a	3	14
Ladies bike	n/a	n/a	n/a	n/a	n/a	n/a	n/a	2	12
Racer	28	29	25	19	22	19	21	10	9
Specific brand mentioned	n/a	n/a	n/a	n/a	n/a	n/a	n/a	2	8
Cross/hybrid/comfort bike	n/a	n/a	n/a	n/a	n/a	n/a	n/a	13	3
BMX	<1	1	-	2	1	1	2	3	1
Other	20	20	26	21	22	16	18	1	1

Bicycle Types

Q11a/b What type of bicycle do you intend to purchase? What type of a bicycle(s) is it?

TABLE: Type of bike owned
BASE: Own or intend to purchase

	W6 Oct'01	W7 Mar'02	W8 Apr'03	W9 Apr'04
	156	113	142	211
	%	%	%	%
Mountain Bike	62	62	68	54
Normal bike	n/a	n/a	3	14
Ladies bike	n/a	n/a	2	12
Racer	28	29	25	19
Specific brand mentioned	n/a	n/a	n/a	8
Cross/hybrid/comfort bike	n/a	n/a	n/a	3
BMX	<1	1	-	1
Other	20	20	26	21

It is possible that people's perceptions of what constitutes a normal bicycle, a ladies bicycle etc is changing and that the boundaries between the categories are beginning to blur

Bicycle Types

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	138	113	131	138	150	156	156	156	211
	%	%	%	%	%	%	%	%	%
Mountain Bike	49	49	48	63	58	62	62	62	54
Normal bike	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	14
Ladies bike	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	12
Racer	28	29	25	19	22	19	19	19	9
Specific brand mentioned	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	8
Cross/hybrid/comfort bike	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	3
BMX	<1	1	-	2	1	1	1	1	1
Other	20	20	26	21	22	16	16	16	1

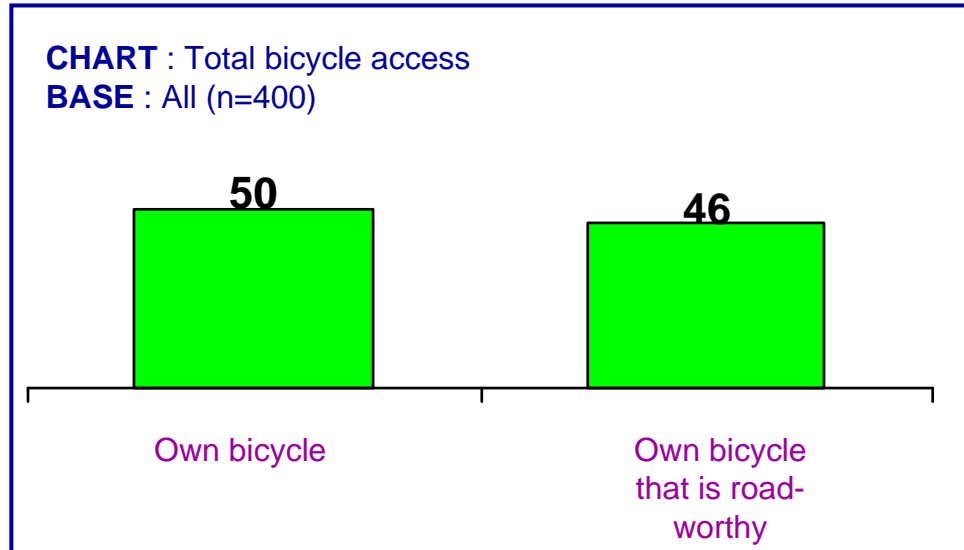
Age ...
15-24 77%
25-34 80%
34-54 51%
55 27%

Gender ...
Male 63%
Female 43%

Gender ...
Male 0%
Female 26%

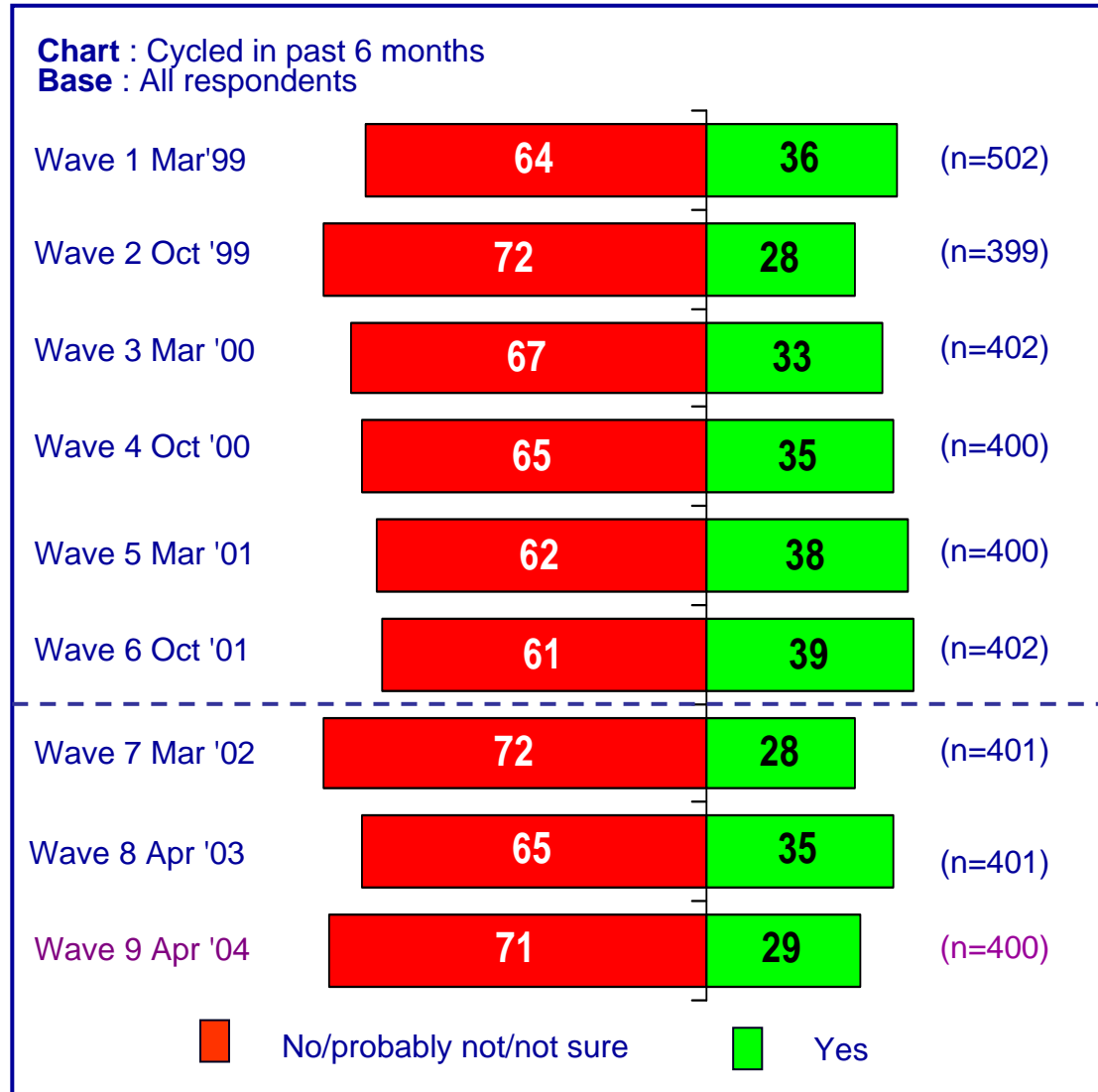
Bicycle Condition

Q10a/12 Do you own a bicycle? Is it in roadworthy condition?
That is, could you ride it right now?



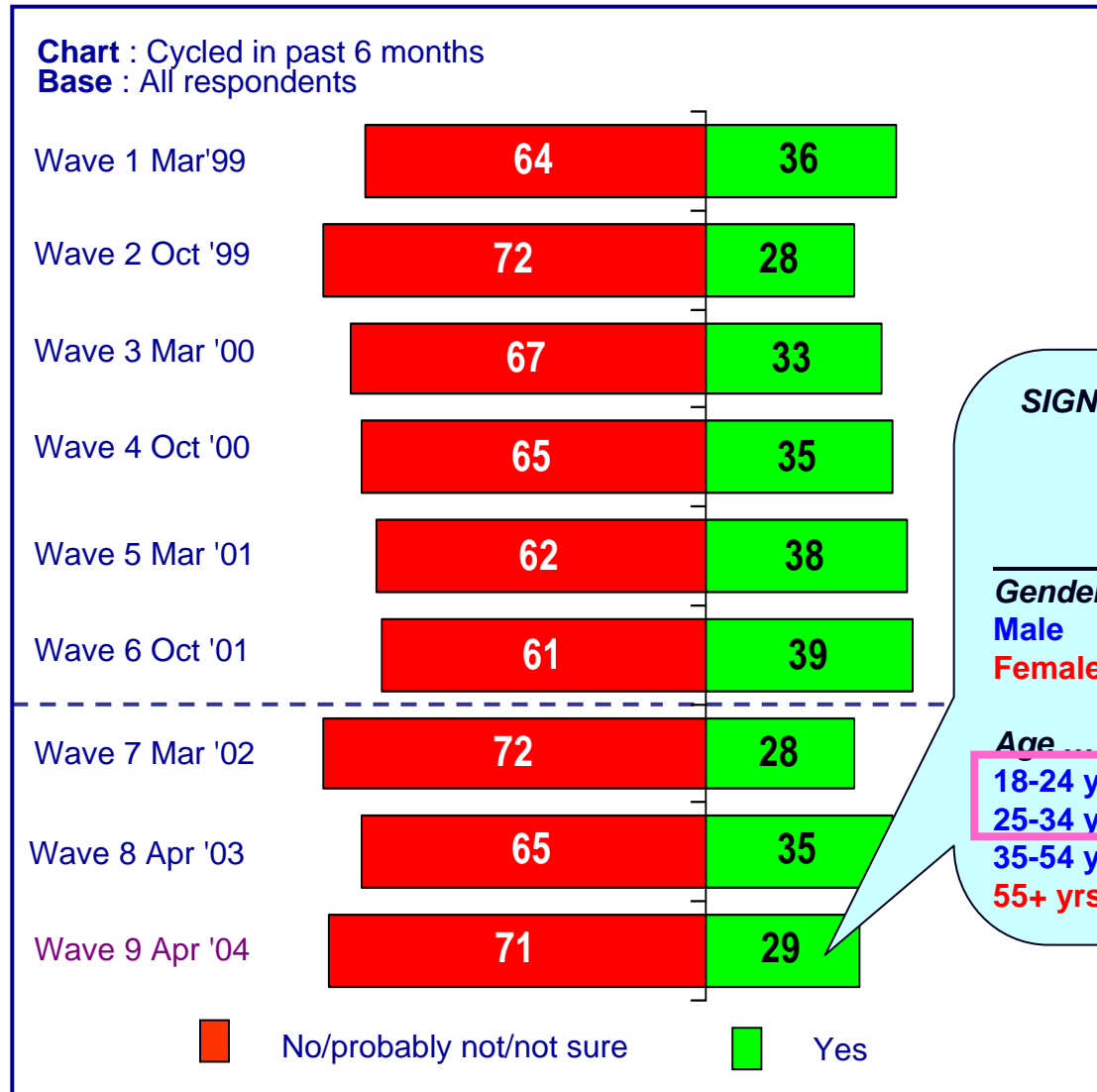
Cycled in Past Six Months

Q4 Have you cycled in the past 6 months?



Cycled in Past Six Months

Q4 Have you cycled in the past 6 months?



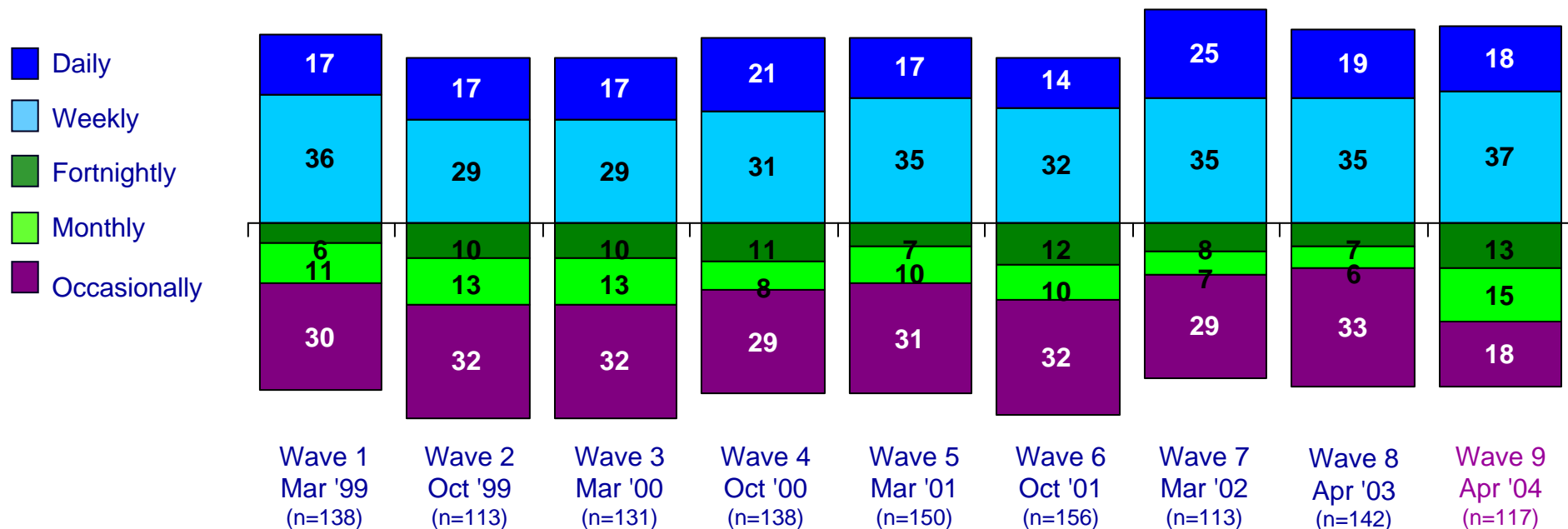
SIGNIFICANT DIFFERENCES BY SUBGROUP ...

	W8	W9
Gender ...		
Male	41%	36%
Female	20%	23%
Age ...		
18-24 yrs	52%	38%
25-34 yrs	43%	30%
35-54 yrs	38%	34%
55+ yrs	22%	20%

Cycling Frequency, Distance and Time

Q6a How many trips would you have cycled in the last 6 months? **Q7** What is your average time for a single trip? **Q8** How often do you make this trip? **Q9** How many kilometres would you travel on an average trip?

Chart : Frequency of cycling trip
Base : Those cycled in previous 6 months



Average <u>Trips</u> ...	23	20	24	25	26	21	26	21	28
Average <u>Mins</u> ...	40	35	40	37	33	42	35	35	43
Average <u>Km's</u> ...	10.1	8.3	10.1	10.0	9.5	11.4	12.9	7.9	10.0

Cycling Frequency, Distance and Time

Q6a
a sin
avera

What is your average time for
trips you would you travel on an

Char
Base

- Daily
- Weekly
- Fortnightly
- Monthly
- Occasionally

Gender ...

WAVE 9

Male



(n=71)

Female



(n=46)

WAVE 8

Male

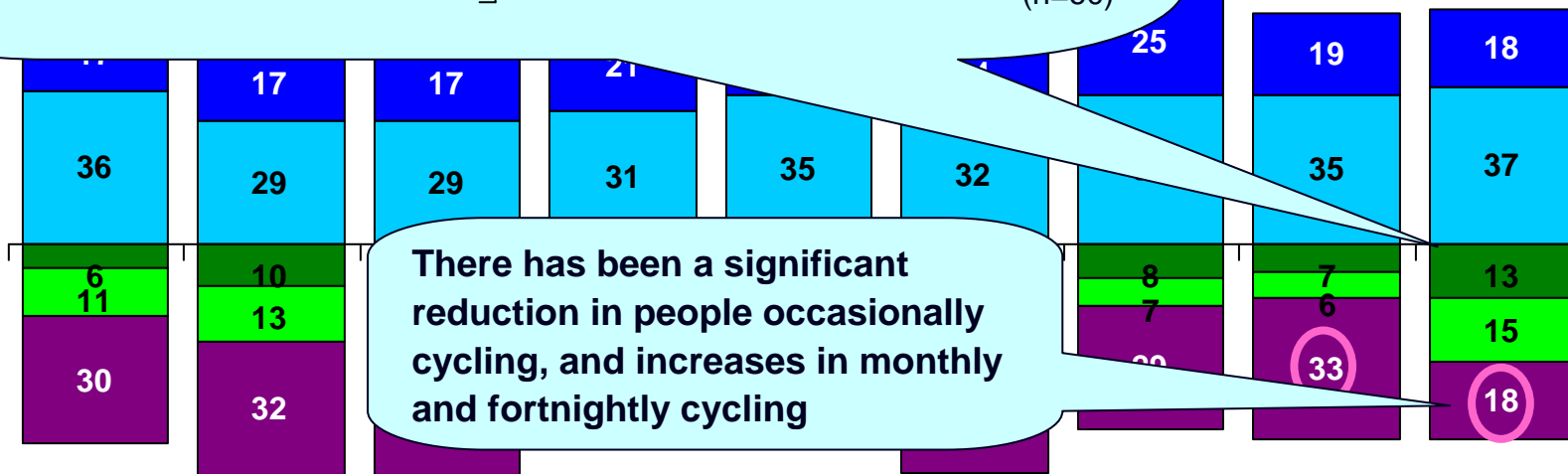


(n=82)

Female



(n=60)



There has been a significant reduction in people occasionally cycling, and increases in monthly and fortnightly cycling

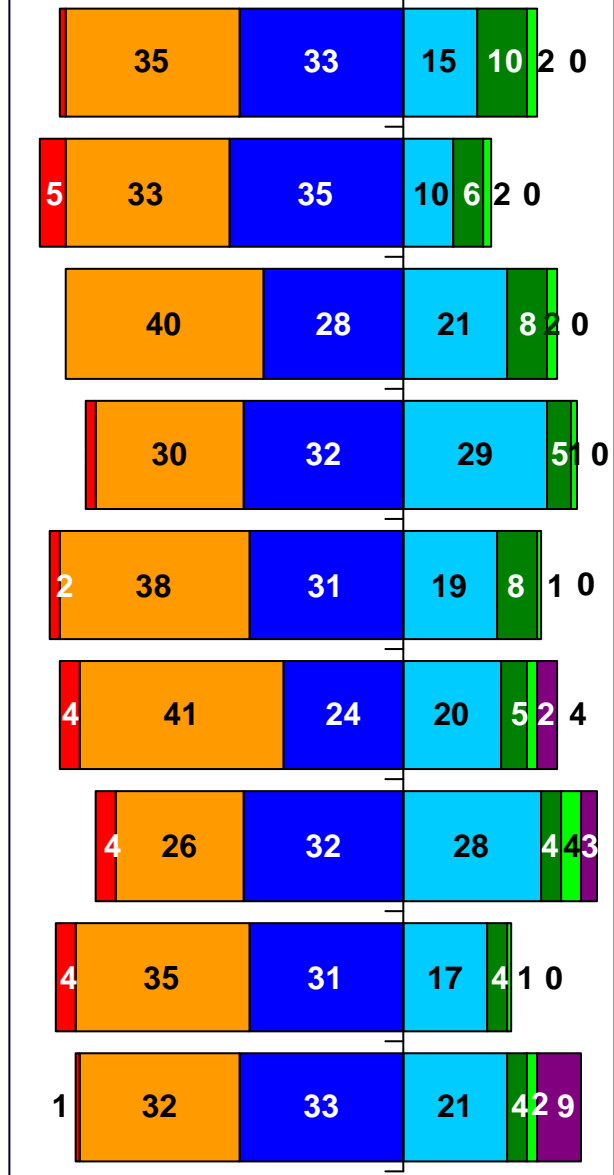
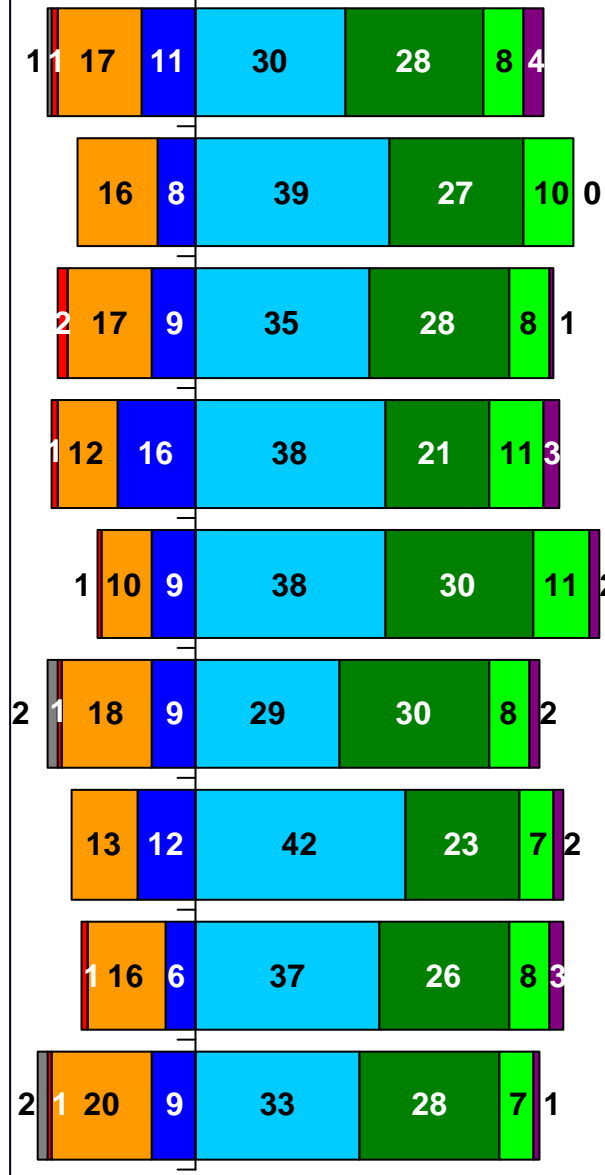
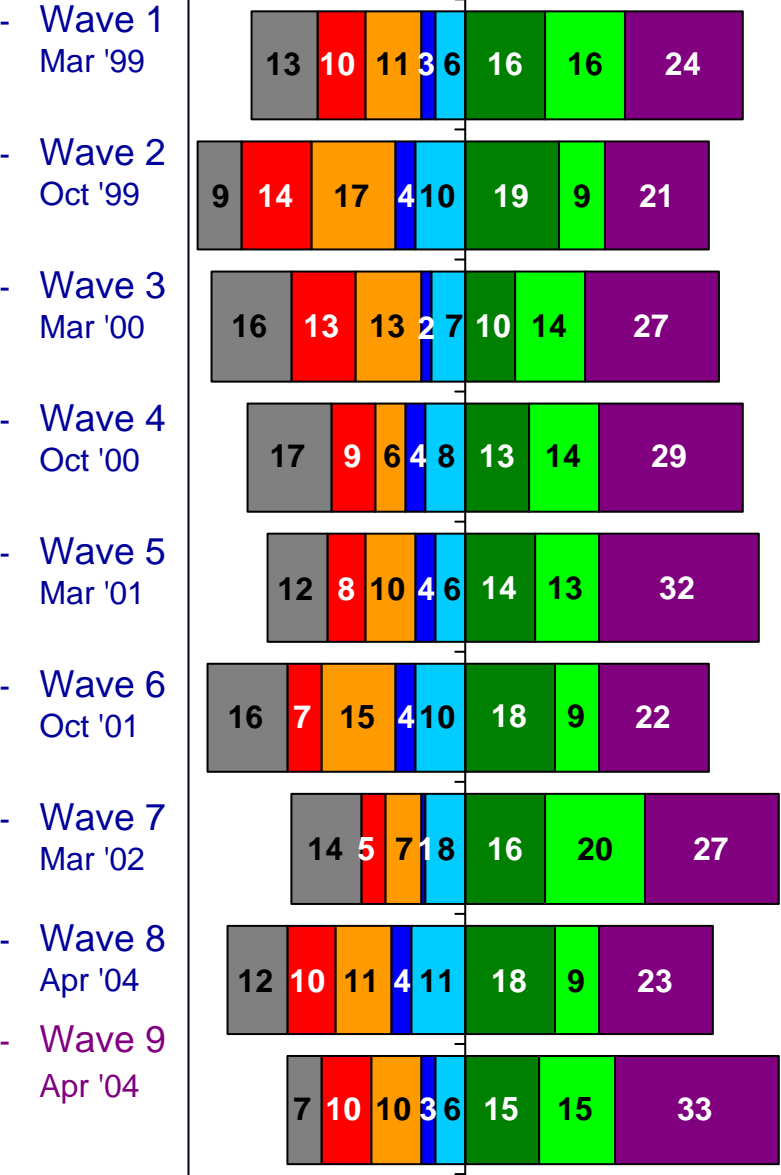
	Wave 1 Mar '99 (n=138)	Wave 2 Oct '99 (n=113)	Wave 3 Mar '00 (n=131)	Wave 4 Oct '00 (n=138)	Wave 5 Mar '01 (n=150)	Wave 6 Oct '01 (n=156)	Wave 7 Mar '02 (n=113)	Wave 8 Apr '03 (n=142)	Wave 9 Apr '04 (n=117)
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Average <u>Trips</u> ...	23	20	24	25	26	21	26	21	28
Average <u>Mins</u> ...	40	35	40	37	33	42	35	35	43
Average <u>Km's</u> ...	10.1	8.3	10.1	10.0	9.5	11.4	12.9	7.9	10.0

TRIPS TAKEN IN LAST 6 MONTHS

MINUTES PER TRIP

KILOMETRES PER TRIP



1 or 2 trips >4hrs
 3 or 4 trips 3-4hrs <1km
 5 or 6 trips 1-2hrs 1-5km
 7 or 8 trips 41-59mins 6-10km
 9 or 10 trips 21-40mins 11-20km
 11 to 20 trips 11-20mins 21-40km
 21 to 49 trips 6-10mins 41-60km
 50 or more trips <5mins >60km

Main Purpose of Cycling

Q5a What is the main purpose for which you cycled in the last 6 months?

	W1	W2	W3	W4	W5	W6	W7	W8	W9
TABLE : Main purpose for cycling	Mar'99	Oct'99	Mar'00	Oct'00	Mar'01	Oct'01	Mar'02	Apr'03	Apr'04
BASE : Cycled in previous 6 months	138	113	131	138	150	156	113	142	117
	%	%	%	%	%	%	%	%	%
Recreational / social purposes	43	45	45	29	45	48	43	41	54
General exercise	35	28	33	40	30	30	35	36	29
To / from school / work	13	14	10	20	15	12	12	8	12
To the shops / friends place / other	5	8	11	10	9	5	8	9	3
Alternative transport	2	5	-	-	1	5	1	4	1
Save money on fuel	-	-	-	-	-	-	1	-	-
For competition / training purposes	2	1	1	1	-	-	-	1	-
Other	1	-	-	1	1	-	1	-	-

All Purposes of Cycling

Q5b Are there any other purposes for which you cycled in the last 6 months?

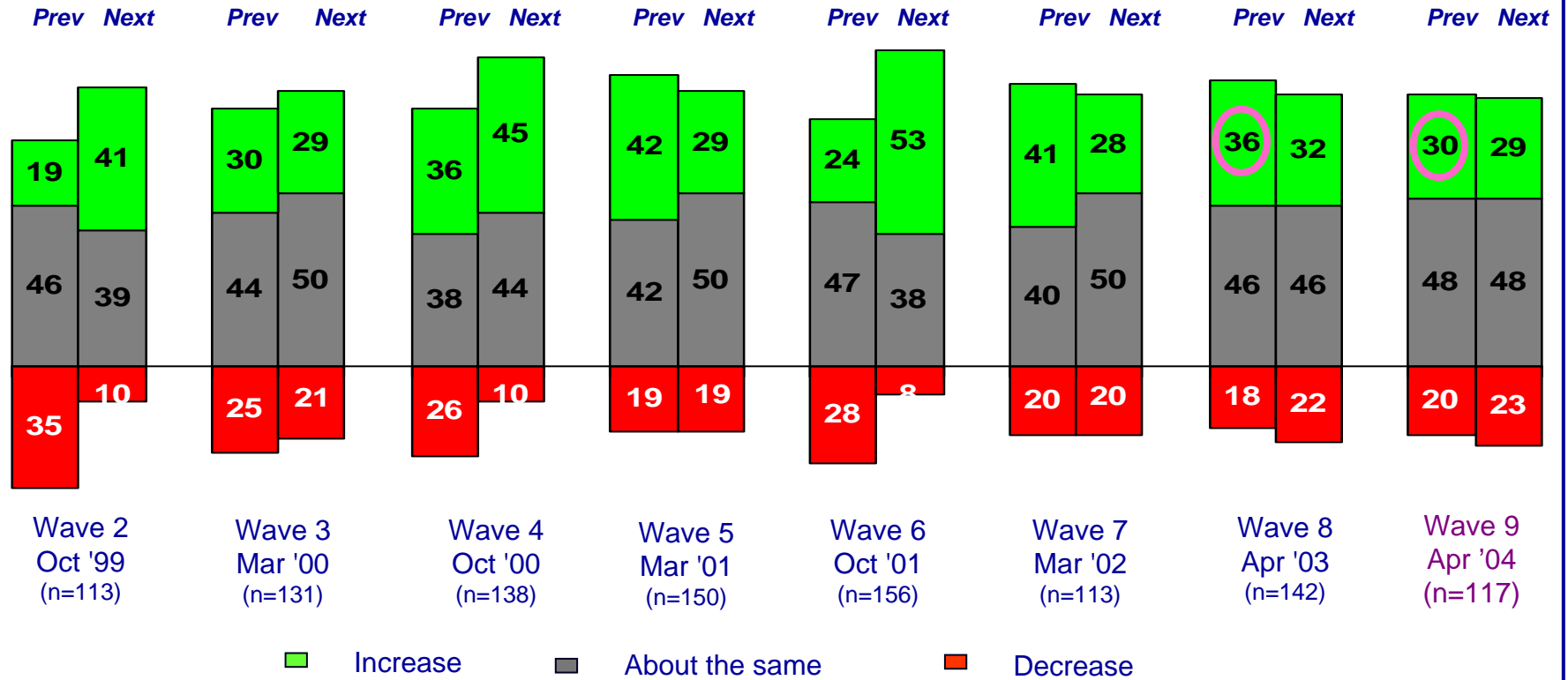
	W8 Apr'03	W9 Apr'04
TABLE : All purposes for cycling		
BASE : Cycled in previous 6 months	142	117
	%	%
- Recreational / social purposes	51	65
- General exercise	48	47
- To / from school / work	11	15
- To the shops / friends place / other	22	12
- Alternative transport	8	3
- Save money on fuel	3	1
- For competition / training purposes	1	2
- <i>Other</i>	5	0

Change/Intended Change in Cycling Frequency

Q6b Is this an increase, a decrease or about the same number of trips compared with the 6 month period prior to that?

Q6c And, thinking about the next 6 months do you think the number of trips you will cycle will increase, decrease, or be about the same number of trips you cycled in the last 6 months?

CHART: Changes in cycling activity over previous and next 6 months
BASE: Those cycled in past 6 months



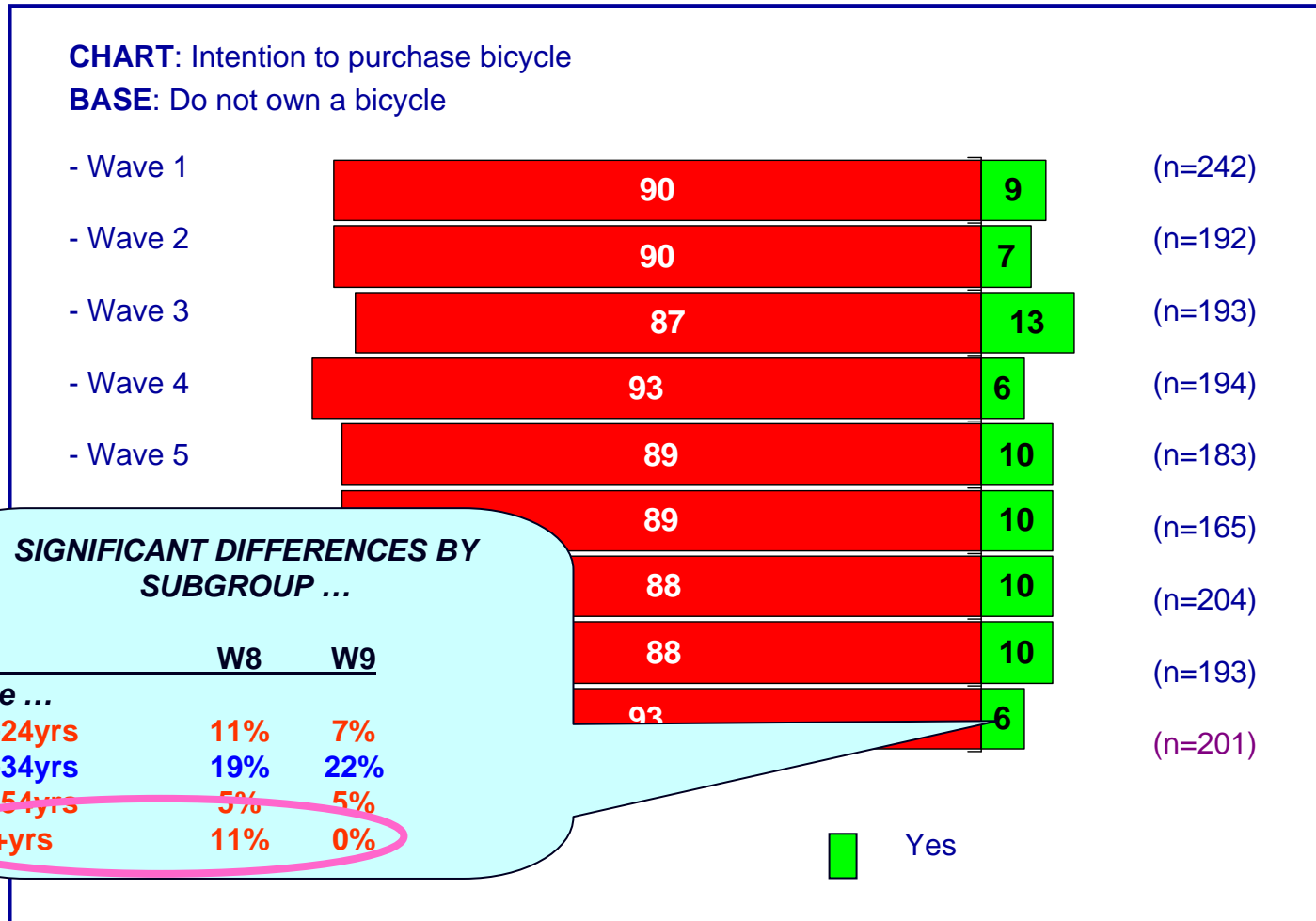
Intention to Purchase a Bicycle

Q10b Do you intend to purchase a bicycle in the next 6 months?



Intention to Purchase a Bicycle

Q10b Do you intend to purchase a bicycle in the next 6 months?



Main Reason Did Not Cycle: Non-users

Q13a What is the single key reason you haven't cycled in the past 6 months?

TABLE : Main reason for not cycling	W1	W2	W3	W4	W5	W6	W7	W8	W9
BASE : Not cycled in previous 6 months	Mar'99	Oct'99	Mar'00	Oct'00	Mar'01	Oct'01	Mar'02	Apr'03	Apr'04
	320	289	270	262	250	246	288	259	283
	%	%	%	%	%	%	%	%	%
No bicycle	12	10	11	9	14	13	14	18	18
Lack of time	14	19	21	20	20	15	18	15	16
Prevented by health	10	9	7	5	8	9	7	11	11
Do not want to	9	9	3	3	4	16	9	15	7
Lack of energy	-	-	-	-	-	-	-	-	7
Other transport quicker/easier	12	11	10	7	8	8	6	6	7
Too old	9	12	7	11	5	8	12	8	5
Prefer other exercise	5	3	6	4	6	<1	2	5	5
Never learnt to cycle	1	3	-	2	1	-	4	1	4
Do not enjoy it	4	3	7	13	9	4	9	2	2
Too unfit	4	3	5	-	6	3	3	2	2
The terrain	3	1	2	3	2	1	2	2	2
Compulsory helmets	3	2	4	4	4	3	1	2	2
Bike not working / in good condition	3	2	1	2	3	3	4	2	1
The weather	<1	6	1	3	-	3	1	1	1
Other (1% or 2% mentions)	8	6	4	7	10	12	6	5	1

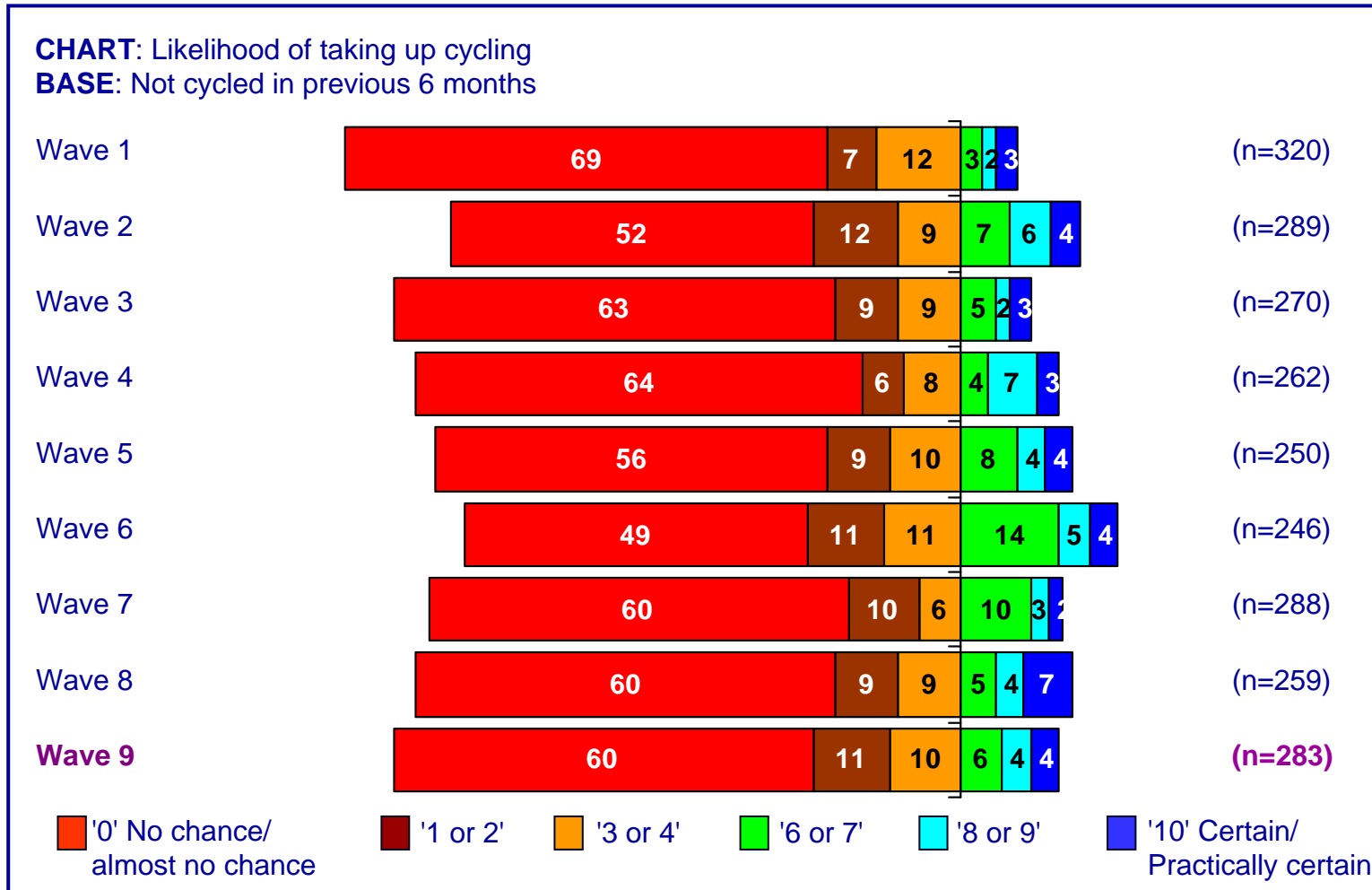
All Reasons Did Not Cycle: Non-users

Q13b Are there any other reasons why you haven't cycled in the past 6 months?

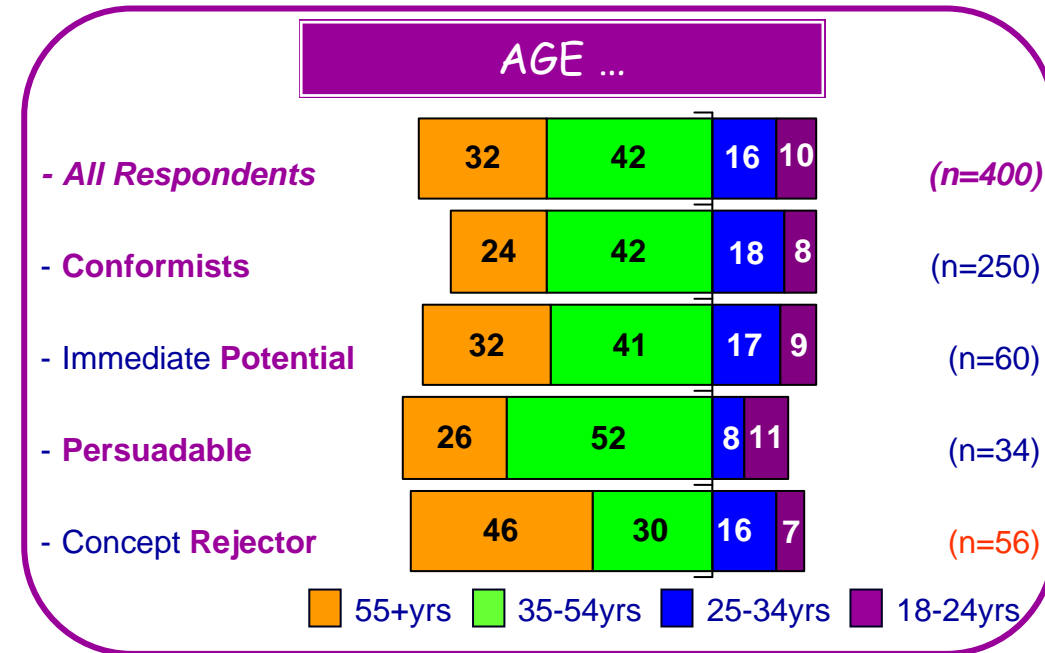
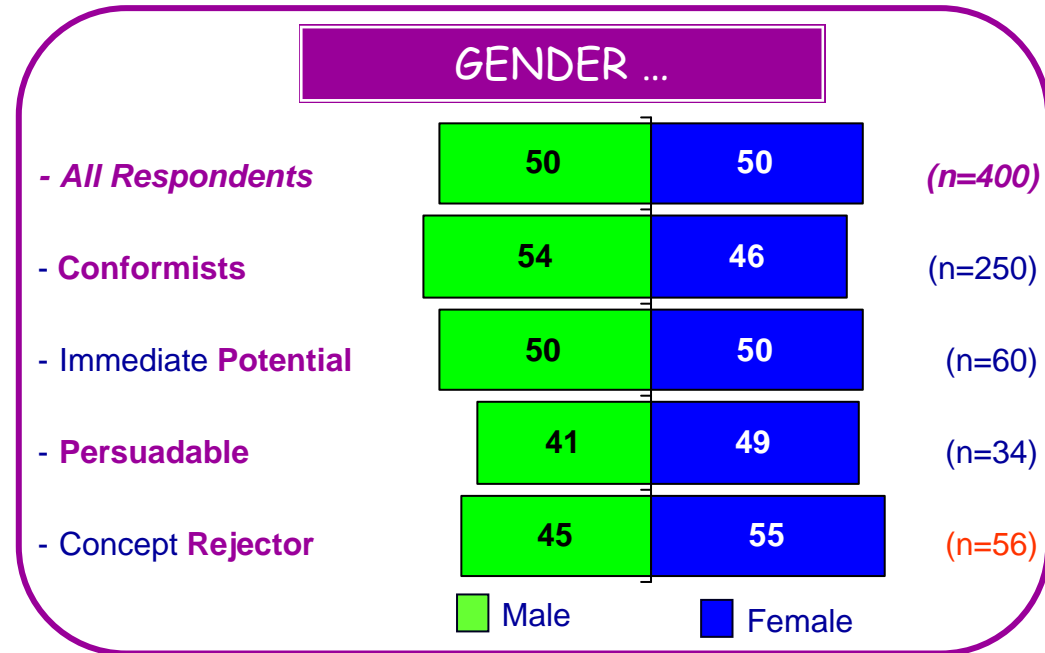
TABLE : All reasons for not cycling	W1	W2	W3	W4	W5	W6	W7	W8	W9
BASE : Not cycled in previous 6 months	Mar'99	Oct'99	Mar'00	Oct'00	Mar'01	Oct'01	Mar'02	Apr'03	Apr'04
	320	289	270	262	250	246	288	259	283
	%	%	%	%	%	%	%	%	%
No bicycle	19	16	17	15	25	18	19	21	22
Lack of time	21	23	25	27	27	23	24	21	21
Do not want to	13	16	4	3	6	24	22	21	14
Prevented by health	10	13	10	5	11	15	10	14	13
Other transport quicker/easier	16	16	15	12	13	12	9	11	13
Lack of energy	-	-	-	-	-	-	-	-	9
Too old	11	16	9	11	6	13	16	21	8
Prefer other exercise	8	7	10	4	8	3	6	9	8
Never learnt to cycle	2	3	2	3	1	1	4	2	5
Compulsory helmets	6	4	10	5	7	4	4	2	5
Do not enjoy it	9	5	9	19	14	8	15	4	4
The terrain	4	3	3	4	5	3	4	3	3
Bike not working / in good condition	4	2	1	2	3	4	5	2	2
Too unfit	6	5	10	6	9	5	6	5	2
The weather	1	9	1	4	1	9	2	2	1

Intention to Commence Cycling: Non-users

Q14 Using a scale of '0' to '10', what are the chances that you will take up cycling in the next 6 months?

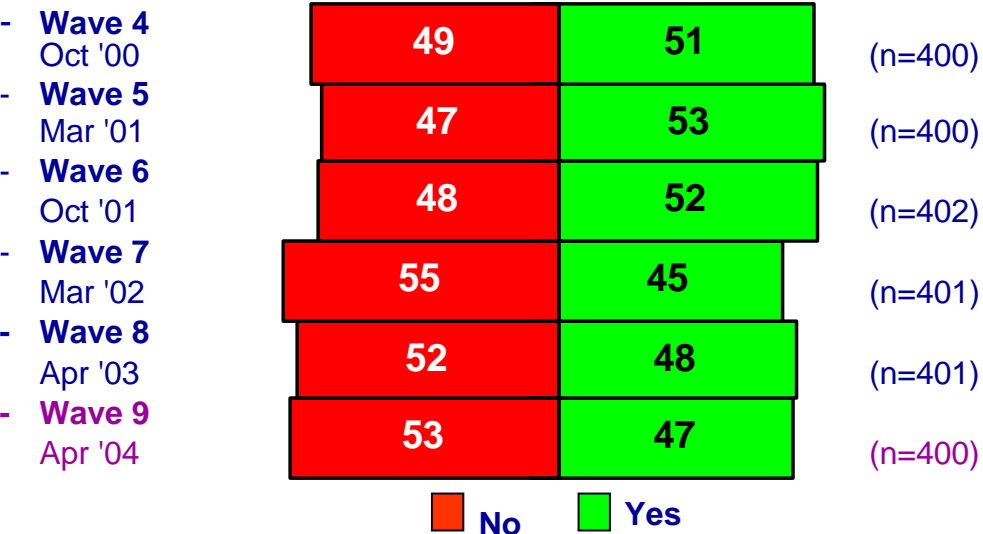


Walking Segment Profiles

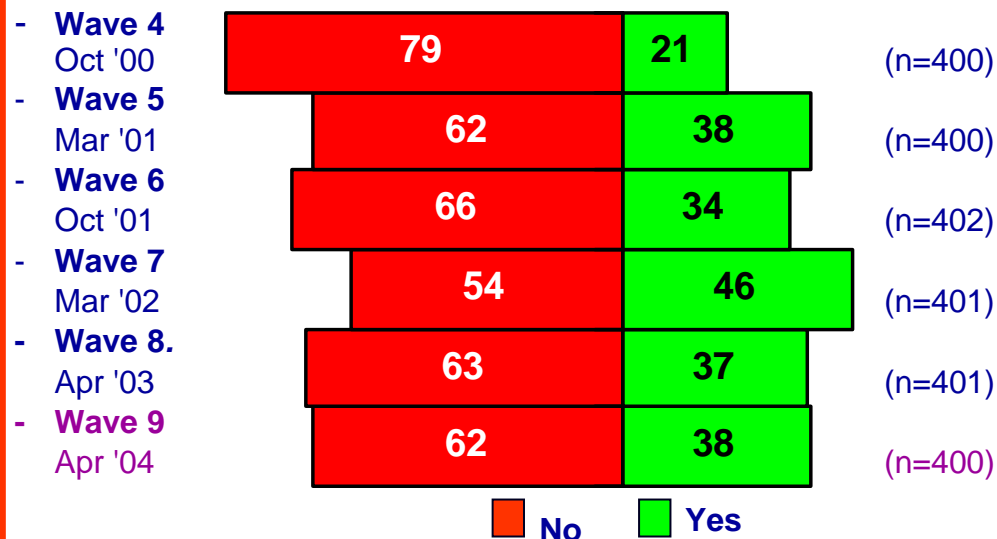


Prompted Campaign Awareness

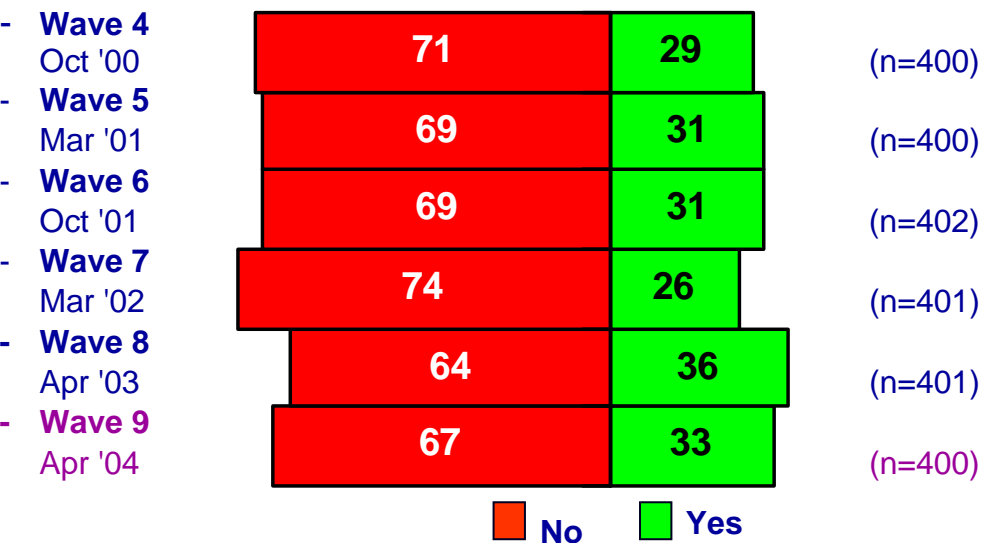
BIKEWEST ...



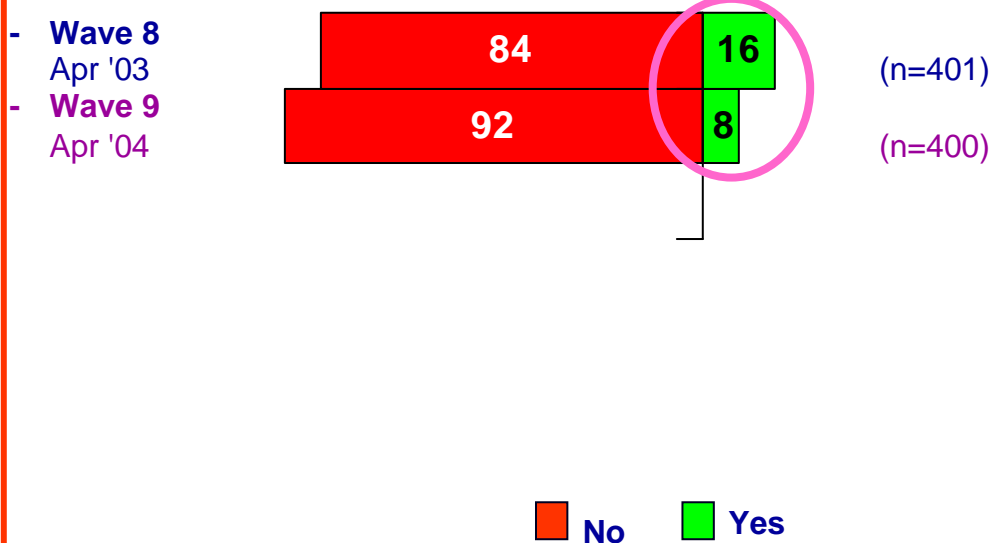
CYCLE INSTEAD ...



TRAVEL SMART ...



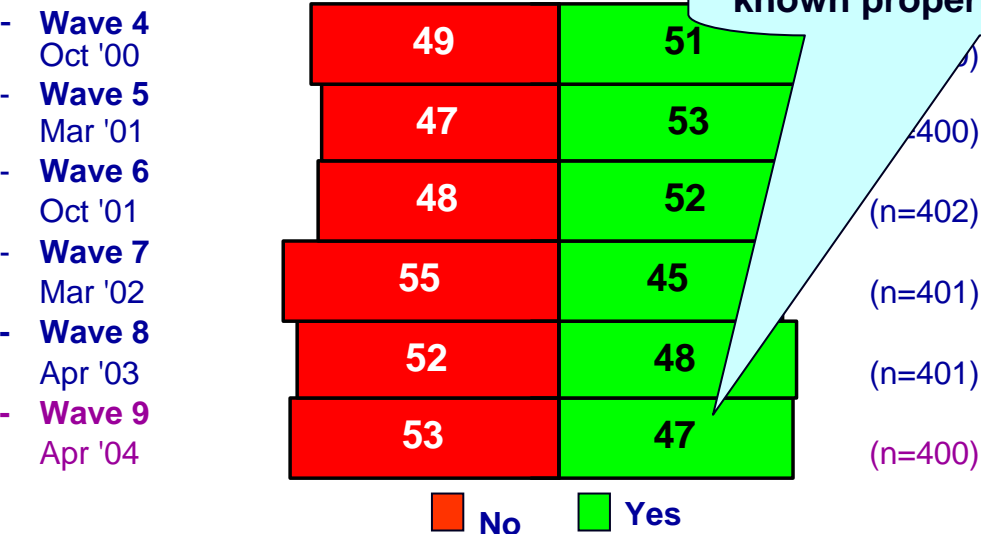
WALK THERE TODAY ...



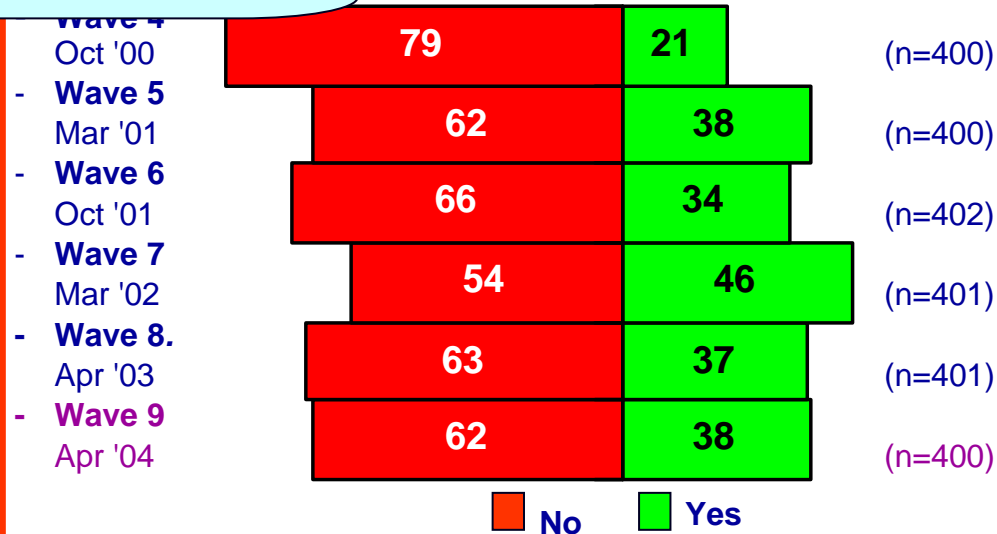
Prompted Campaign Awareness

BIKEWEST ...

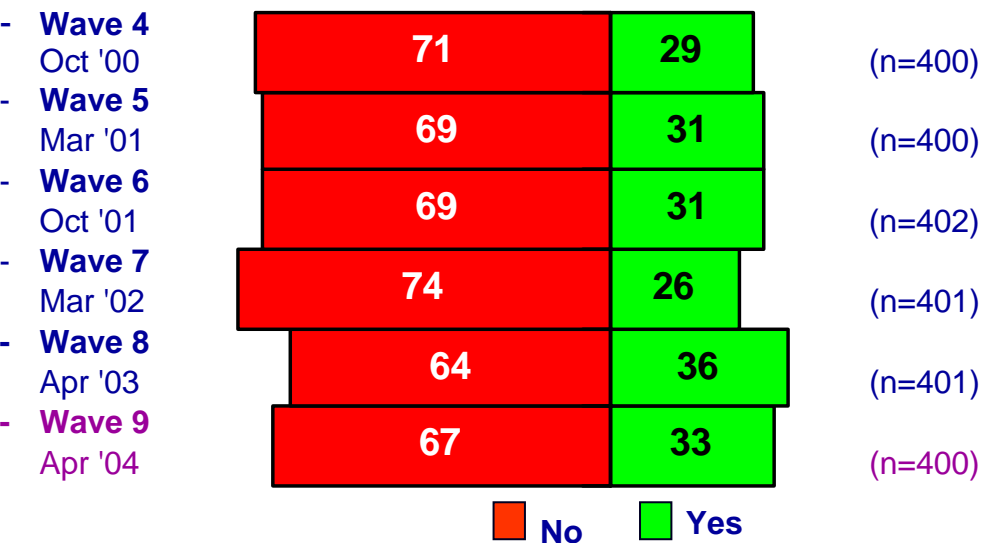
Bikewest is still the most well known property



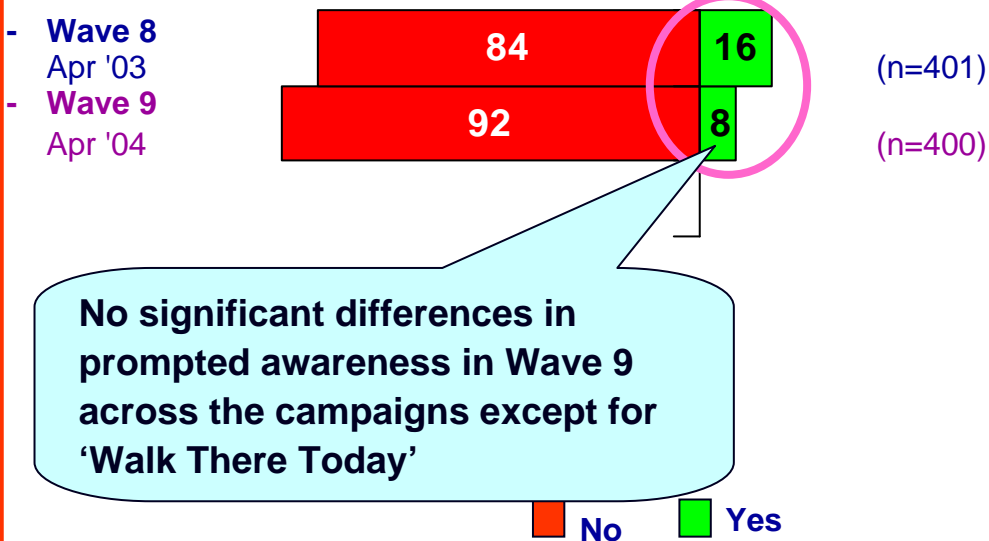
WALKWAY CYCLE INSTEAD ...



TRAVEL SMART ...



WALK THERE TODAY ...



Prompted Campaign Awareness

BIKEWEST ...

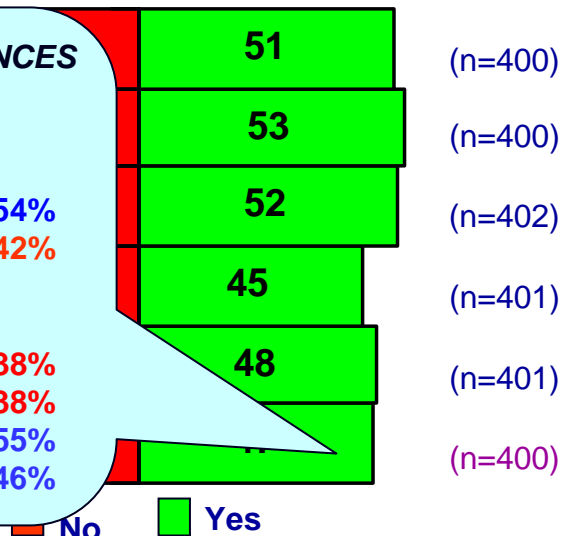
SIGNIFICANT DIFFERENCES BY SUBGROUP ...

Bicycle Ownership ...

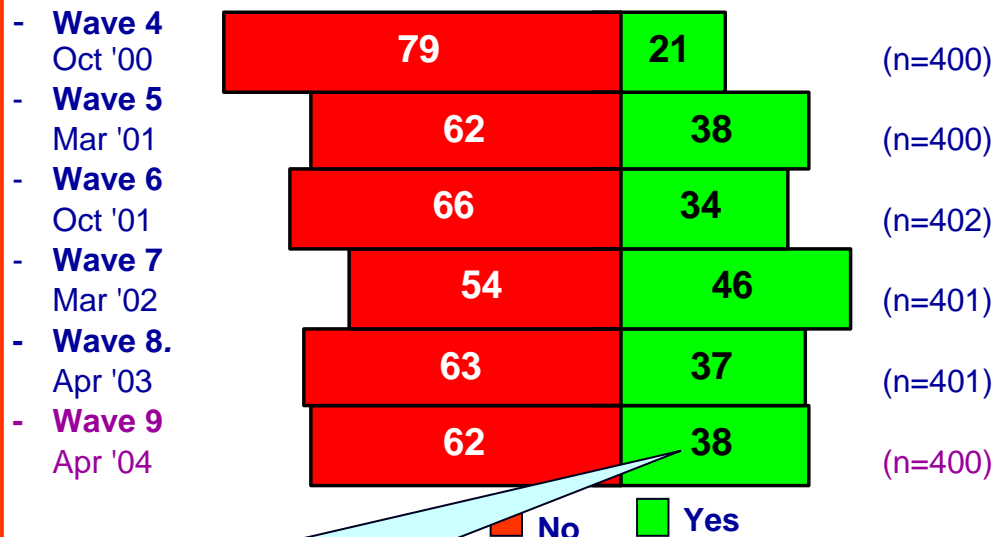
Own bicycle 54%
No bicycle 42%

Age ...

18-24 year olds 38%
25-34 year olds 38%
35-54 year olds 55%
55+ 46%



CYCLE INSTEAD ...



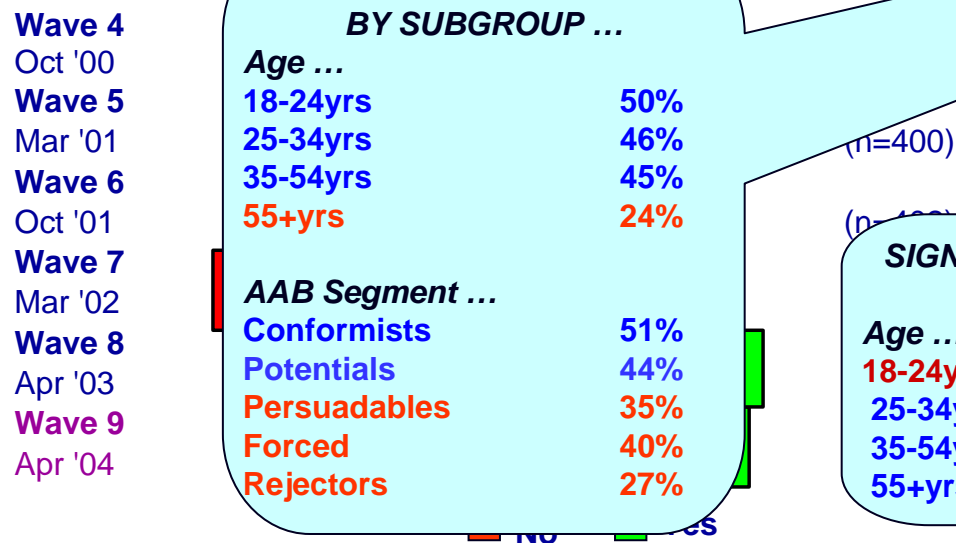
SIGNIFICANT DIFFERENCES BY SUBGROUP ...

Age ...

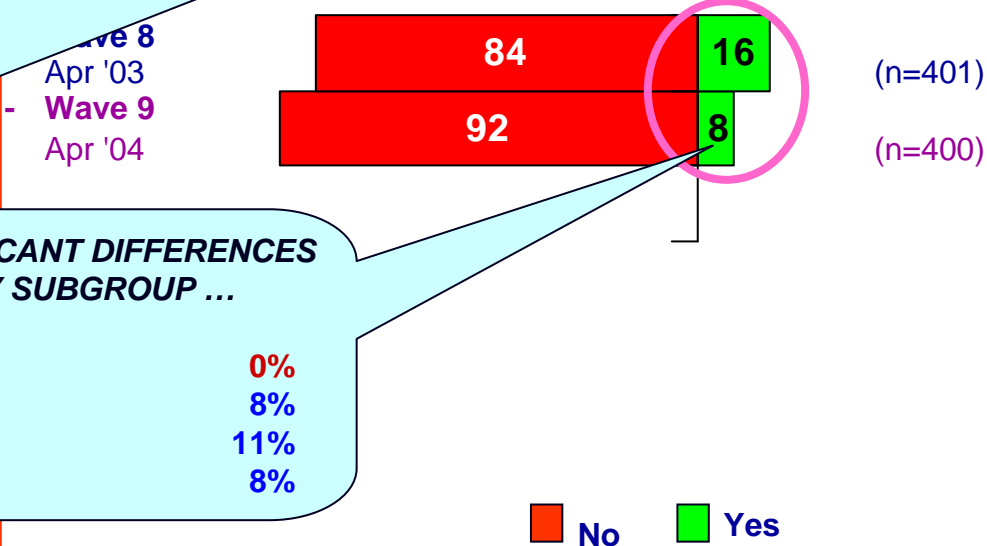
18-24yrs 50%
25-34yrs 46%
35-54yrs 45%
55+yrs 24%

AAB Segment ...

Conformists 51%
Potentials 44%
Persuadables 35%
Forced 40%
Rejectors 27%



WALK THERE TODAY ...



SIGNIFICANT DIFFERENCES BY SUBGROUP ...

Age ...

18-24yrs 0%
25-34yrs 8%
35-54yrs 11%
55+yrs 8%

No Yes

