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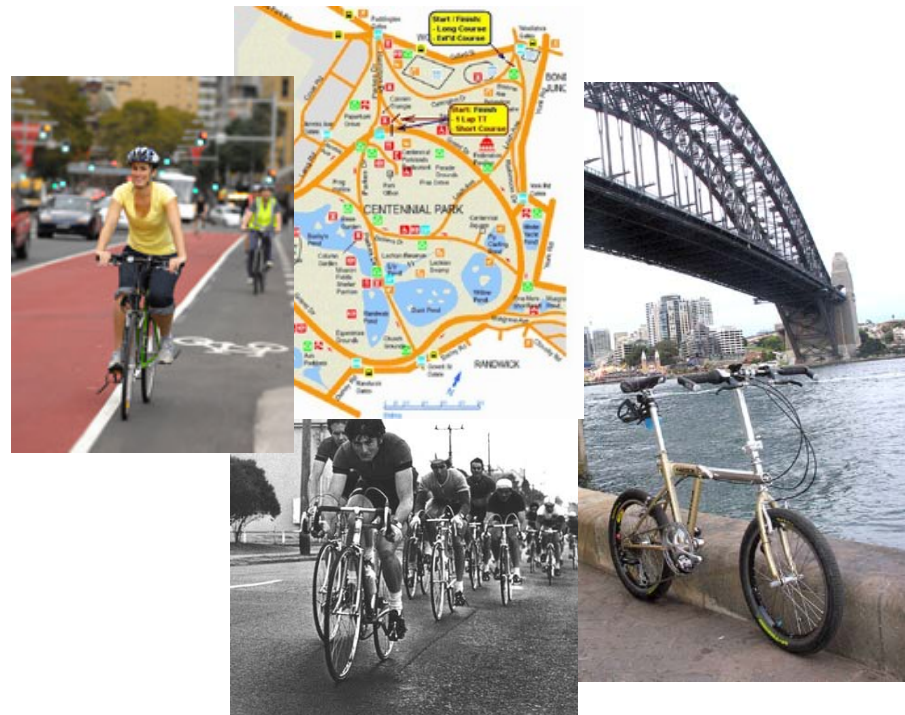
Sydney cycling research: internet survey

A report prepared by
Environmetrics

For
City Of Sydney
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Introduction

City of Sydney is a capital city council, responsible for the commercial, financial and cultural hub of the greater Sydney area.

This encompasses a community of 160,000 residents, 350,000 workers and more than 450,000 daily visitors.

The City aims to meet local residents' needs whilst advancing Sydney's global position as Australia's premier city, through the implementation of a range of services, programs and initiatives directed at residents, businesses and visitors.

Cycle Strategy

City of Sydney has recently developed its ten-year cycle strategy, which is being publicly exhibited until end September. All public submissions will then be considered by Council, before the final strategy is launched in November.

The strategy provides overall direction and aims to achieve greater participation in cycling and has two parts; an infrastructure plan (to create a network of cycle routes, develop cycle signage and incorporating safety features such as traffic calming schemes) and a social initiatives plan to promote wider community awareness of the benefits of cycling and to encourage participation.

The cycle strategy has the following aims:

- To increase the proportion of trips made by bicycle in Sydney
- To create and maintain a comfortable and bicycle friendly environment in Sydney
- To promote the benefits of cycling, and
- To improve cycle safety

Its targets are to:

- Increase the number of bicycle trips made in Sydney, as a percentage of total trips, from 2% in 2006 to 5% in 2011 to 10% by 2016
- To measure the proportion of Sydney cyclists who feel comfortable and confident when they are cycling in the city and ensure that it is 80% or higher by 2016
- To measure and monitor the number of collisions and injuries involving bicycles and reduce the number of reported incidents.



Research Aims

The overall objective of the research is to provide information to inform the delivery of the **social initiatives** within the cycle strategy. This involves:

- identifying target audiences (and helping to prioritise them),
- recommending broad strategies to raise awareness of the benefits of cycling and to increase the likelihood of target audiences cycling and;
- helping to test and prioritise ideas within the social initiatives plan.

It will also form a benchmark for further research to be undertaken over the ten-year lifetime of the cycle strategy.

The City Of Sydney commissioned Environmetrics to undertake a research methodology to address these objectives.



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Methodology

A two-pronged research program was devised

1. An internet survey to establish the size and shape of various cycling segments, their current riding behaviour, barriers to riding and likely initiatives to encourage more riding in and around the City
2. Focus group testing amongst key segments to test possible social initiatives in more depth

This report outlines the findings, analyses and recommendations from the internet survey phase. These findings will help inform the design of the focus group research (which will be reported separately).

Internet survey

A survey was conducted online amongst 1,150 Sydney residents, aged 18 to 50 years, within a 10km catchment of the CBD.

Respondents were randomly selected from a large database, emailed a survey link and asked to answer a questionnaire that took around 10 minutes to complete.

The questionnaire detailed their current cycling behaviour, attitudes, barriers, potential triggers for increased cycling, media consumption and demographics (see Appendix for copy of questionnaire).

The survey was conducted during October 2006



Sample segments

The sample design for the survey was constructed to ensure sufficient numbers of key segments were present. These segments were based on residence, work, study and cycling behaviour. They are outlined below:

Segment	Sample
Sydney LGA residents	306
Students	177
City workers	671
Others in 10km radius	844

These segments provide the basis for much of the analysis in this report. The aim being to fully understand how cycling behaviour and attitudes correlate with demographics, place of residence and how segment media and information consumption can be best utilised to target the key segments.

Segment	Criteria	Sample
Non-cyclists	Don't own a bike and don't cycle	286
Infrequent cyclists	Own a bike but use it less than once a month	180
Potential cyclists	Don't own a bike but are interested in cycling	437
Cyclists	Own a bike and cycle at least once a month	247
Total		1,150

Note to Reader

- In preparing this report we have presented and interpreted information that we believed relevant for completing the agreed task in a professional manner.
- Where we have made assumptions as a part of interpreting the data incorporated in this report, we have sought to make those assumptions clear. Similarly, we have sought to make clear where we are expressing our professional opinion rather than reporting empirical data. Please ensure that you take these assumptions into account when using our report as the basis for your decision-making.
- Some percentages have been rounded off. When this occurs, totals may be a little more or a little less than 100.
- Percentages add to more than 100 when multiple responses are possible.
- The Appendix contains a copy of the questionnaire used and the full results cross-tabulated by segment and demographic groups. The tables therefore provide the full detail of responses and we suggest you look through them if you have particular interests in specific questions and groups.

Executive summary

Analysis of the internet survey data has provided us with some interesting insights into the different cyclist segments – who they are, their current attitudes to cycling and opportunities for targeting Potential Cyclist markets. These are summarised below.

Segment	Cycling behaviour and attitudes	Future opportunities
<p>CYCLISTS (at least once a month)</p> <p>Show a strong male bias although are a mix of ages from 18 to 50.</p> <p>They are represented throughout the 10km catchment with pockets in the Sydney LGA, inner west and eastern suburbs</p> <p>They tend to work in trade and construction as well as white-collar jobs such as IT, government and finance. Many students are also in this segment</p>	<p>The cyclist segment ride for a variety of reasons – work, uni, visiting shops and friends. An underlying motivation for their cycling is physical fitness. Environmental, convenience and financial benefits are further down the list.</p> <p>While part of the segment comprised a group of ‘hard core’ cyclists (members of cycle clubs etc.), generally the cyclist segment is more casual and varied in their cycling behaviour – many felt their knowledge of bike maintenance was average or low and a significant proportion were unconfident riding in traffic.</p> <p>To further emphasise this 61% had been riding regularly for only 5 years or less.</p>	<p>CONTINUE TO NURTURE AND ENCOURAGE</p> <p>This segment has made the commitment to cycling mainly because of fitness and health reasons. However, there is a danger that concerns about traffic and safety, as well as knowledge of bike maintenance could threaten their interest in day-to-day cycling.</p> <p>The message to these cyclists therefore is likely to rely on changes (actual and perceived) to cycling infrastructure, rather than communicating the benefits of cycling (of which most are already convinced).</p> <p>Cyclists are avid newspaper readers, especially the SMH, free City papers and local papers (and they expect to find information about cycling initiatives in local and Council media).</p> <p>Their radio listening is similar to many in the catchment (high rating commercial FM stations), although they do shows spikes with ABC stations (Triple J, 702 and Radio National), Vega FM and community stations such as Fbi).</p>

Segment	Cycling behaviour and attitudes	Future opportunities
<p>POTENTIAL CYCLISTS (don't own a bike but interested in cycling)</p> <p>A younger group with a slight female bias and a propensity to live in the Sydney LGA (as well as the inner west and lower north shore).</p> <p>Many are students and of those who work, their jobs tend to be in the hospitality, tourism, media and creative industries.</p> <p>They currently are more likely to walk or use public transport for travel than other segments.</p>	<p>Apart from not owning a bike, safety, traffic and cycling infrastructure issues are the main reasons they give for not cycling more often.</p> <p>Dedicated bike lanes and off road routes would be the main initiative to get them riding more regularly, followed by a perceived increase in driver awareness and safety.</p> <p>Once again, fitness and leisure would be a prime motivator for cycling if perceptions of safety and cycling amenity were addressed</p>	<p>FITNESS, FRIENDS AND FUN</p> <p>The students within this segment obviously represent an opportunity. Students are generally more predisposed to ride and there is an untapped group who are considering it but haven't quite made the leap.</p> <p>More generally, the young female Potential Cyclist seems to be another opportunity. Safety is a current barrier, but the prospect of physical fitness and exercise is potentially a strong motivator. So too is the impact of peer pressure – if cycling is seen as 'cool' and something 'we all do' then this segment may respond well. This could apply equally to students, Sydney LGA residents and CBD workers in This segment.</p> <p>Because of their relatively younger age profile, communicating to this potential cycling segment is potentially difficult. They are the most likely segment to name television as a place where they would find out about cycling initiatives (possibly because TV is a major sources for much of their information and entertainment). Their readership of other publications is generally on par or slightly lower than the total sample (although there are some spikes for the free City papers) and their radio consumption is also typical of the catchment and their demographics.</p>



Segment	Cycling behaviour and attitudes	Future opportunities
<p>INFREQUENT CYCLISTS (own a bike but cycle less than once a month)</p> <p>This segment has turned off cycling for many of the reasons that are currently barriers to entry for the Potential Cyclist segment – safety, traffic, infrastructure etc.</p> <p>Combined with this are other demographic and lifestyle factors that have turned them off cycling. Put broadly, many seem to be having families and have moved to more of the outer suburbs of the 10km catchment. Subsequently they have become more reliant on the car and the demands of their family.</p>	<p>Safety and increased provisions for cyclists were still big concerns for this segment, although transporting their family around was a major reason why they no longer cycle.</p> <p>Availability of bike lanes, off road routes and increased driver awareness would help shift their attitudes to cycling, and the fitness and environmental benefits are well acknowledged by this segment, but their overall enthusiasm to actually cycle given the right environment is considerably less than for the Potential Cyclist segment.</p> <p>It is worth noting that this group was the most likely segment to say they don't cycle more regularly because they aren't fit enough.</p>	<p>KEEP IT LOCAL. FOR THE FAMILY, FITNESS AND THE FUTURE</p> <p>This segment is likely to be more difficult to change attitudes and especially cycling behaviour. However, because they do own a bike (and presumably cycled more regularly when they were younger) they do show some potential.</p> <p>Because they are time and energy poor (family, work etc.), any bike trips they make are likely to be short, within their local area (e.g. going to the local shops) and to combine a physical fitness benefit.</p> <p>Encouragingly, this segment is the most likely group to nominate local media (newspaper, council website and newsletters) as the places they would expect to find out about cycling initiatives. Importantly they also show a relatively high propensity to read local papers and listen to community radio.</p> <p>It is also important that this segment continues to receive positive messages about cycling because of the flow-on effects to their children and the prospect that once their children are older (and more manageable), they themselves might have more time and energy for cycling.</p>



Segment	Cycling behaviour and attitudes	Future opportunities
<p>NON-CYCLISTS (don't own a bike and don't cycle)</p> <p>This group was the most averse to cycling. They were more likely to be female and in older age groups (although not exclusively).</p> <p>They shared some of the other more 'suburban' features of the Infrequent Cyclist segment.</p>	<p>While not having a bike is an obvious impediment for this group, and their concerns about traffic and safety were evident, their general disinterest in cycling was the key reason why they don't cycle.</p> <p>Even when a range of cycling initiatives concerning safety, traffic and cycling infrastructure were presented to them they were dramatically less enthusiastic than the other non-regular cycling segments to say they would consider taking up cycling</p>	<p>WON'T CHANGE THEIR MIND</p> <p>Apathy is the great enemy here. Trying to persuade a group that seem to have had little history with cycling and no current interest is a tough task and one that would no doubt require significant resources and efforts.</p> <p>This segment is also fairly apathetic in their media consumption, which makes the task even harder.</p> <p>It is more likely that any future initiatives and communication strategies that target the Potential and Infrequent Cyclist groups may have some (albeit small) flow-on impact on the Non-Cyclists. But targeting them in their own right would seem to be an uphill battle.</p>

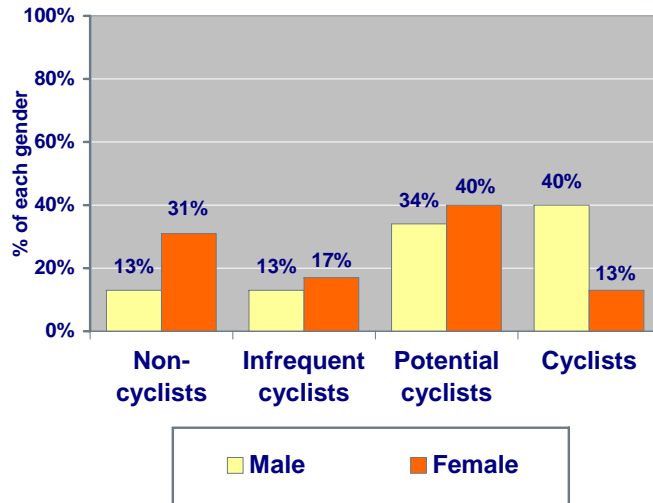


Demographics

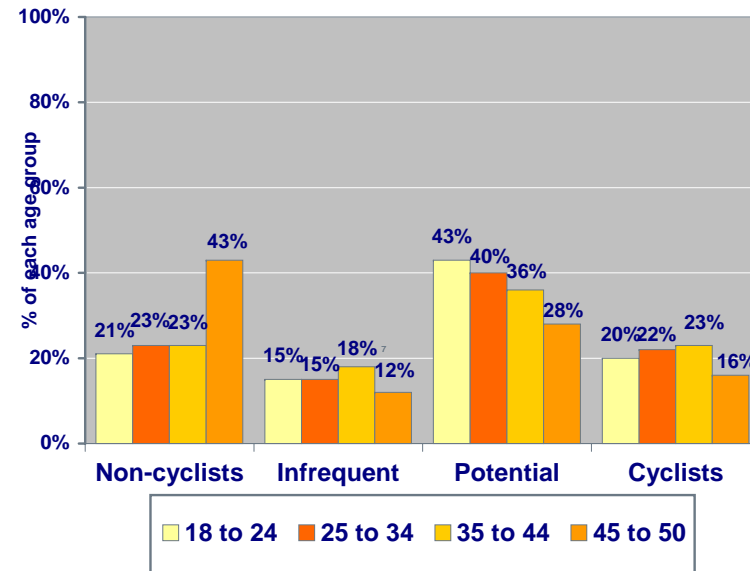
This section of the report presents a demographic profile of the sample by their cycling behaviour.

Gender

The graph below shows that while non-cyclists are more likely to be female, cyclists show a male bias.



Age



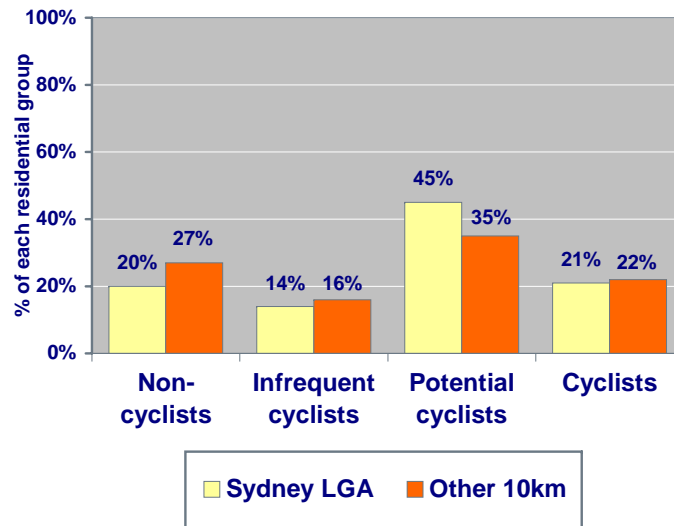
It is interesting to note that non-cyclists were significantly more likely to be aged 45 to 50. Age is also a determining factor in the Potential Cyclist group, with the proportion of Potential Cyclists diminishing with age.



Demographics

Residence

The graph below shows the residence of different types of cyclists.

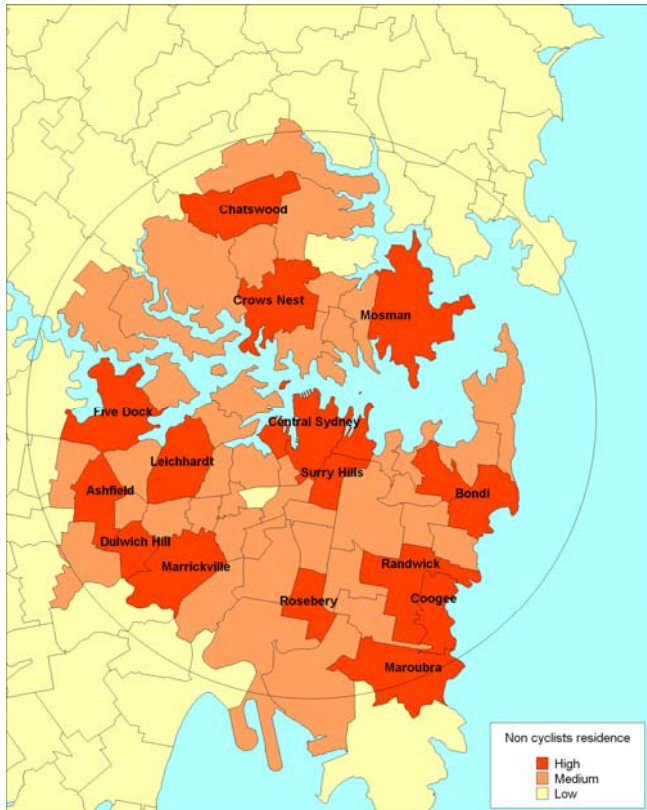


Looking at the graph to the left, we can see that Non-cyclists were slightly more likely to come from outside the Sydney LGA area, while Potential Cyclists were more likely to live within the Sydney LGA area. It is likely that this is related to distance.

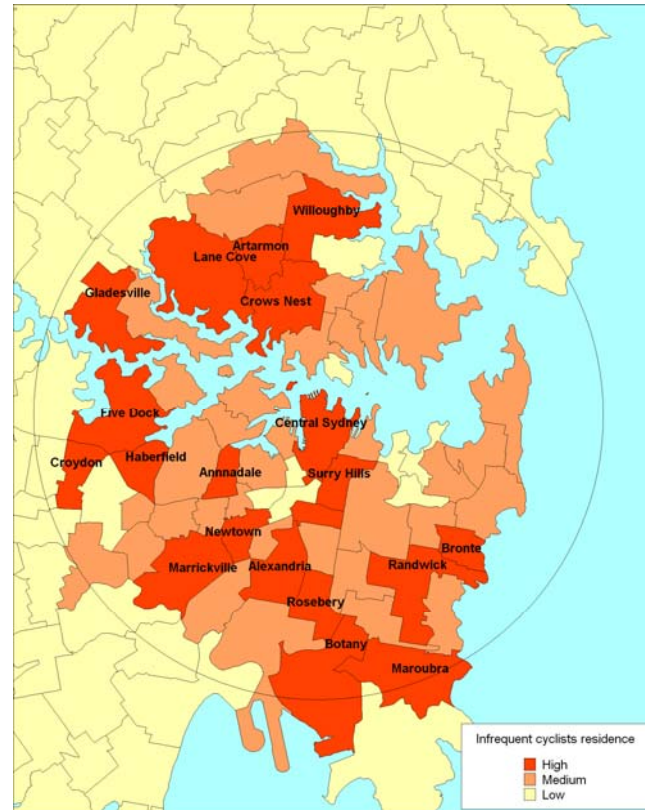
The maps on the following pages show the residence of the different types of segments.



Residence: non-cyclists



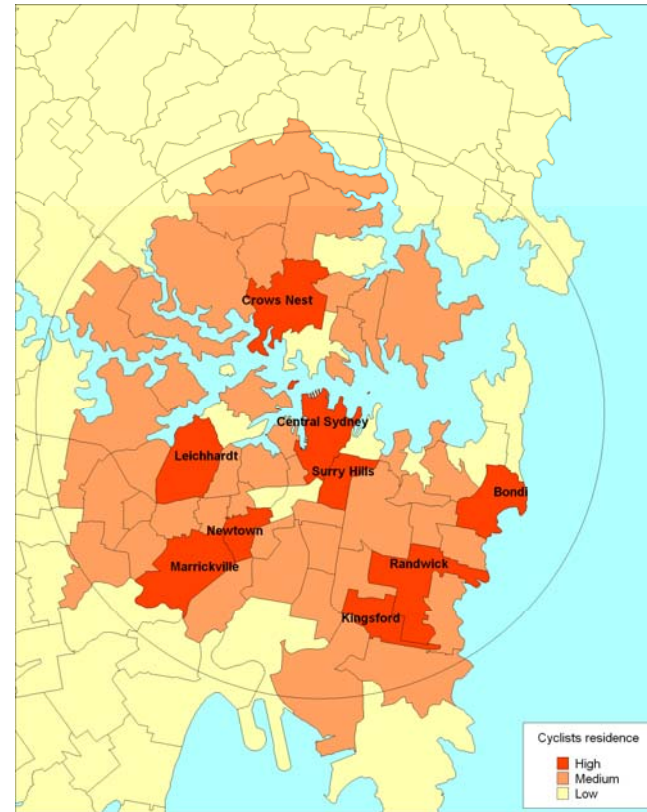
Residence: Infrequent cyclists



Residence: Potential cyclists

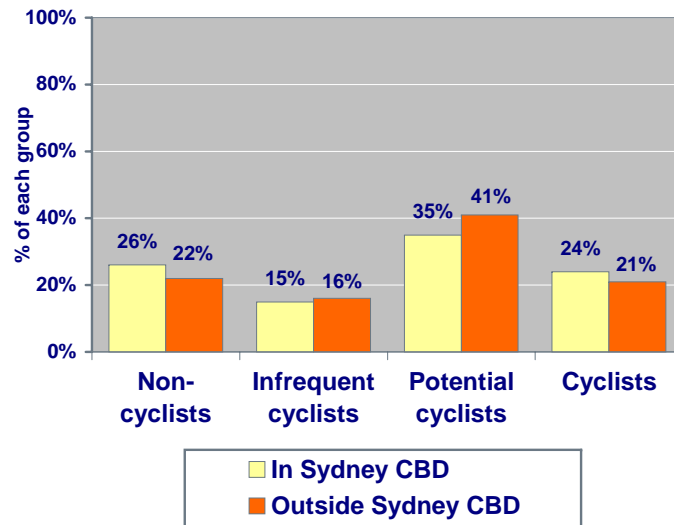


Residence: Cyclists



Demographics

Place of work



There was little difference between the different cycling groups in terms of the location of work.



Occupation categories

The following table shows the percentage of people in each occupation category who fall into each of the cycling segments. The top 5 are shown to give an indication of how job type correlates with propensity to cycle (NB. some occupation groups with small sample bases have been excluded from this analysis).

Non-cyclists		Infrequent cyclists		Potential cyclists		Cyclists	
Financial Services	38%	Government, Defence and Security	26%	Student	51%	Trades / Services	46%
Admin / Customer Service	33%	Management / Human Resources	22%	Food / Hospitality / Tourism	51%	Building & Construction	38%
Legal	32%	Education / Science	22%	Advertising / Media / Entertainment / The Arts	50%	IT / Communications	29%
Home duties	31%	Home duties	20%	Home duties	41%	Government, Defence and Security	26%
Retail and Sales	30%	Legal	20%	Healthcare / Medical	41%	Accounting and Financial Services	23%
				Management / Human Resources	41%	Retail and Sales	23%

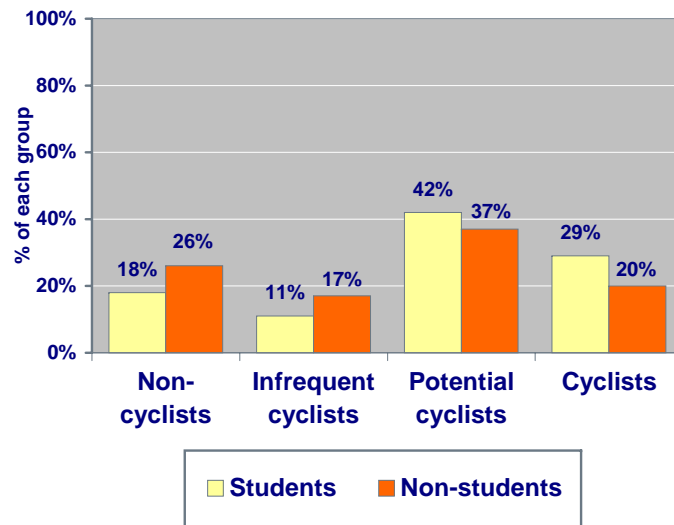
The occupation groups of monthly cyclists often reflect their male bias with a mix of outdoor and skilled labour positions alongside more white-collar jobs.

Potential cyclists on the other hand - as well as being more likely to study - tend to work in typically lower paid and creative occupations. This is consistent with their younger and more female profile.



Demographics

Students



Students were slightly more likely to be interested in cycling or cycle already than non-students.



Cyclists

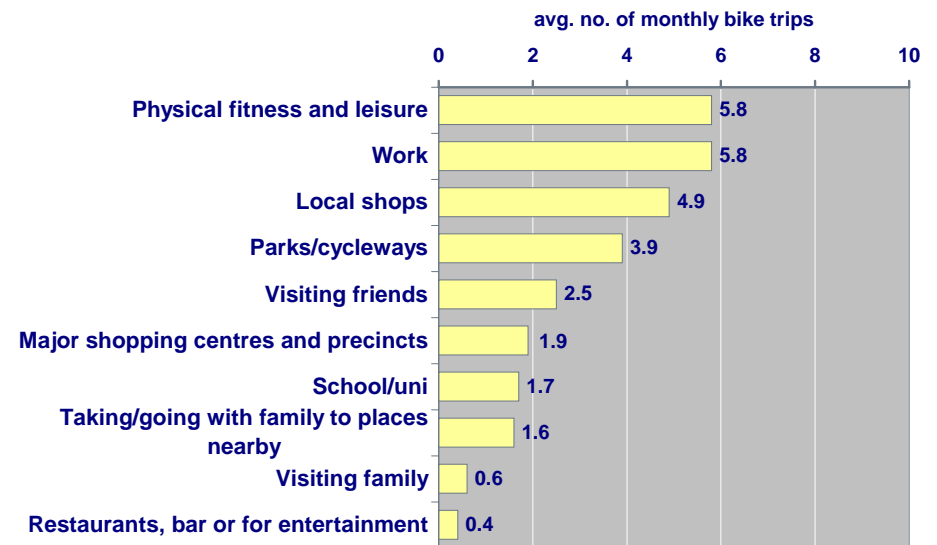
Average monthly trips

Monthly cyclists were asked to estimate the number of monthly bike trips they make for each of the following trip types. The average monthly trips are shown to the right.

Physical fitness and work trips were the most frequent trip types, followed by visiting local shops and parks/cycleways.

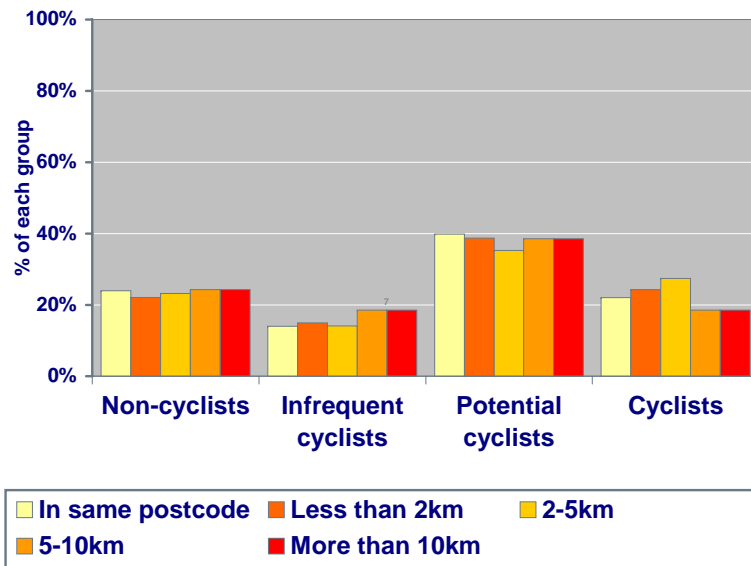
When the total number of trips is calculated the average is around 29 per month. This figure is over inflated because around 64% of the cyclists doubled counted many of their trips as also for 'physical fitness and leisure' (e.g. some counted a 'work trip' as also a 'physical fitness and leisure trip'). Once these fitness and leisure trips are removed the average total monthly trip figure falls to around 23. It should also be noted that there are other doubling up of trips in the sample (e.g. cycling home from work and visiting a friend on the way would be counted as 2 trips) and if all of these were taken into account the total monthly trips would drop further. In fact, cyclists made an average of 4 trip types each month and only 7% cycled for just one reason (and no others) during the month.

As well as emphasising the importance cyclists place on the physical fitness aspect of their riding, these results also demonstrate that Sydney cyclists take a multi-purpose approach to their riding.



Cycling and distance to work

An interesting analysis is how a propensity to cycle matches the distance one has to travel to work. The chart below shows the distance people have to travel for work and the cycling segment they fall into



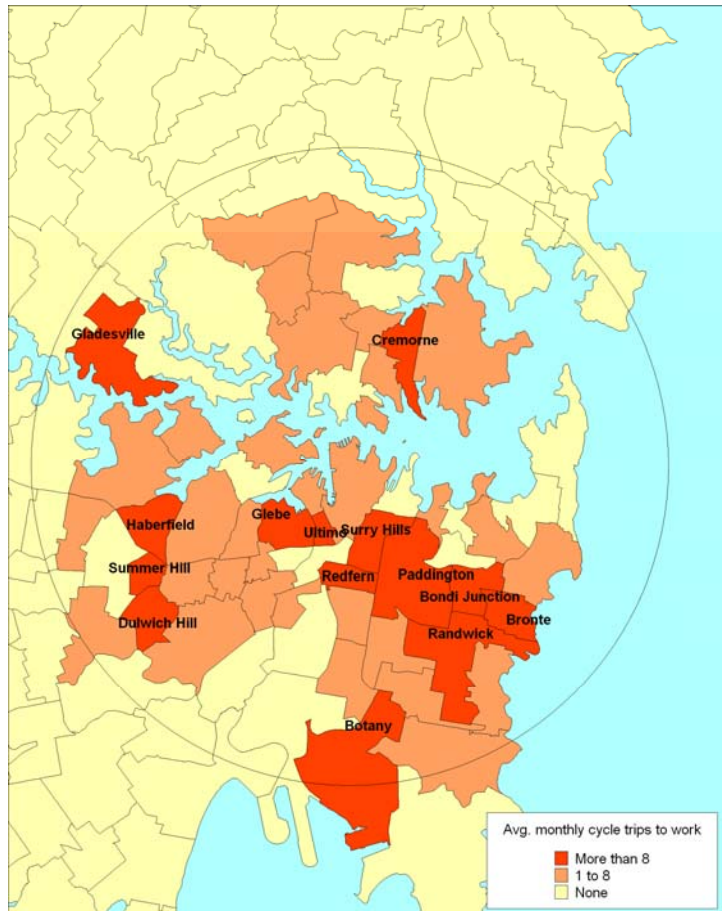
The hypothesis that the closer you are to your work the more likely you would be to cycle is disproved by these results that show very little correlation between the two.

When the Cyclist segment is looked at in more detail, 45% cycle at least once to work every month and while the average distance they cycle is around 3km, 20% cycle between 5 and 10km to work.

The residence of 'work cyclists' and the average number of monthly work trips they make is shown over the page.



Catchment of work cyclists



The catchment shows the regular work cyclists tend to live in postcodes east of the CBD, as well as a pocket in the inner western suburbs and lower north shore

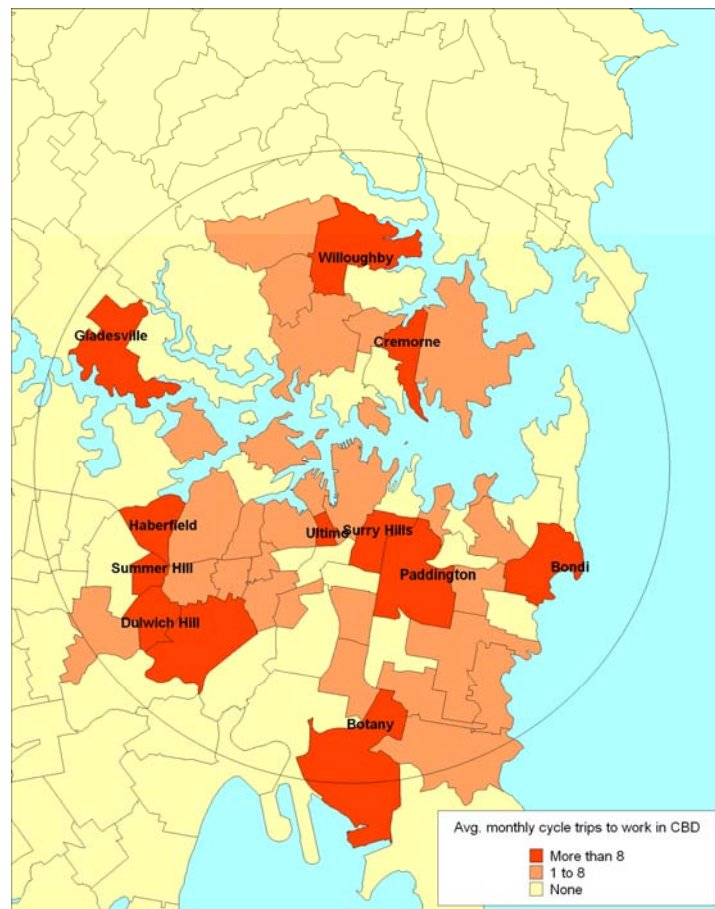
Around 16% of the sample that worked in the CBD said they cycled to work at least once every month. The map over the page shows the residential catchment of these CBD workers who cycle to work.



CBD worker cyclists

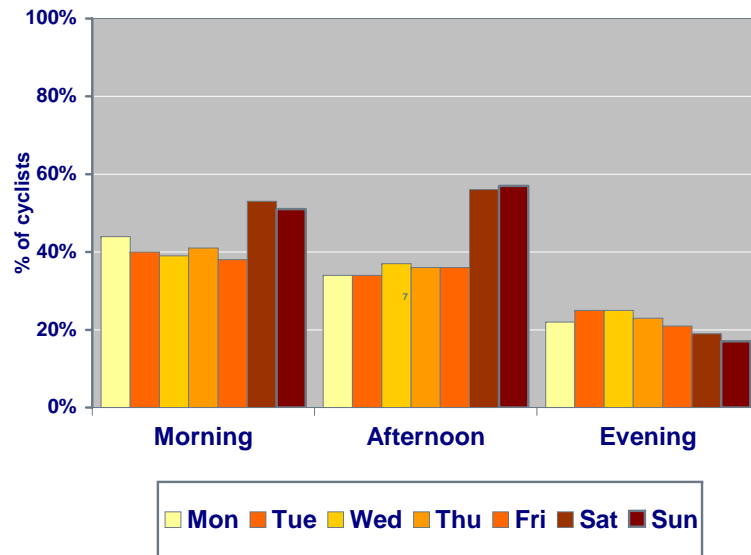
The residential catchment map to the right shows the frequency of cycling to work for CBD workers.

The general pattern for total work cyclists (shown previous) is kept for CBD workers – pockets of cyclists in the east, inner west and lower north shore.



Cyclists

Days and time of cycling



Morning was more a more popular time of day to ride on weekdays, while on the weekend afternoon was as popular as morning.

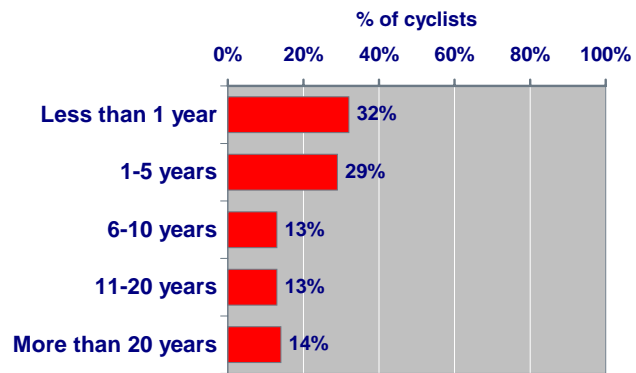
Only about a quarter of cyclists indicated that they ride in the evening any day of the week.



Cyclists

Length of time cycling

Around 60% of the cyclists surveyed had only been riding regularly for 5 years or less.



Sydney LGA residents had come to cycling even more recently than others in the 10km catchment.

Membership of Cycling Clubs/Groups

Only 8% of cyclists indicated they were a member of a cycling club/group. Around 13 different clubs were mentioned with the most common club being Bicycle NSW.

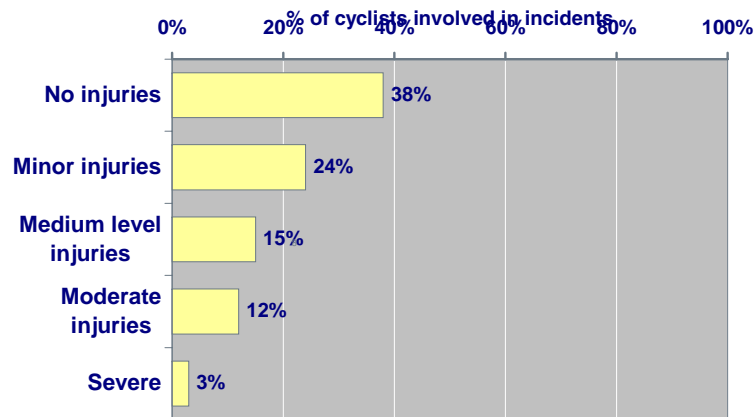


Cyclists

Involvement in accidents

Around 14% of cyclists had been involved in an accident in the past 12 months. They were asked to give a description of the accident. These descriptions were then categorised in terms of their level of seriousness.

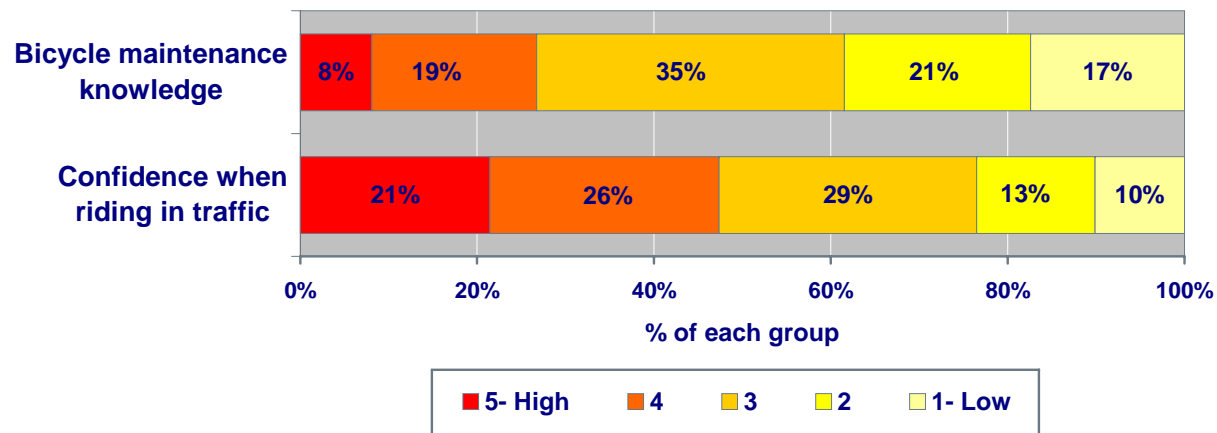
The majority of cyclists who had been involved in incidents in the past 12 months had sustained no injuries or only minor injuries such as grazes and bruising. A full list of verbatim responses can be found in the Appendix to this report.



Cyclists

Knowledge and confidence

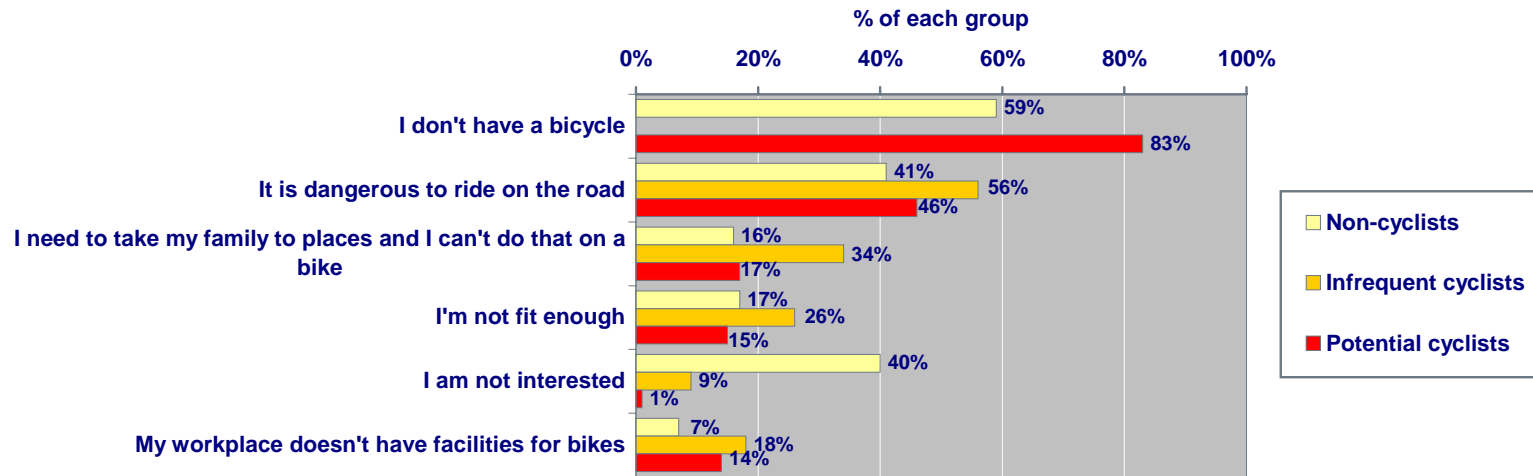
The graph below shows levels of confidence in terms of bicycle maintenance and riding in traffic.



The majority of cyclists felt that their knowledge in terms of bicycle maintenance was low to medium. While cyclists were more confident when riding in traffic, only one fifth (21%) indicated that their confidence levels when riding in traffic were high.

Non-regular cyclists

Reasons for not cycling



Among Potential Cyclists (i.e. those who were interested in cycling) the most common reason given for not cycling was not having a bicycle.

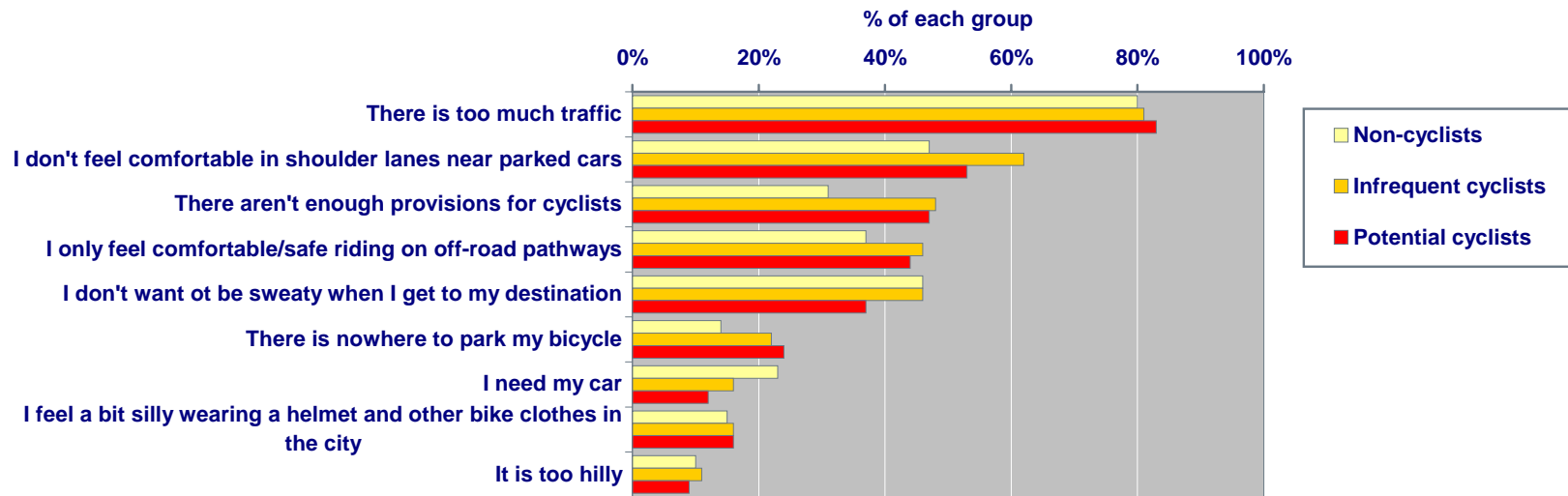
Non-cyclists were the most likely out of the groups to say that they were not interested in cycling, suggesting that for a portion of this group there isn't anything that could convince them to take up cycling.

Infrequent cyclists were more likely than other groups to feel that it was dangerous to ride on the road, and that cycling was inconvenient, as they had to take their family places.



Non-regular cyclists

Reasons for not cycling in the CBD



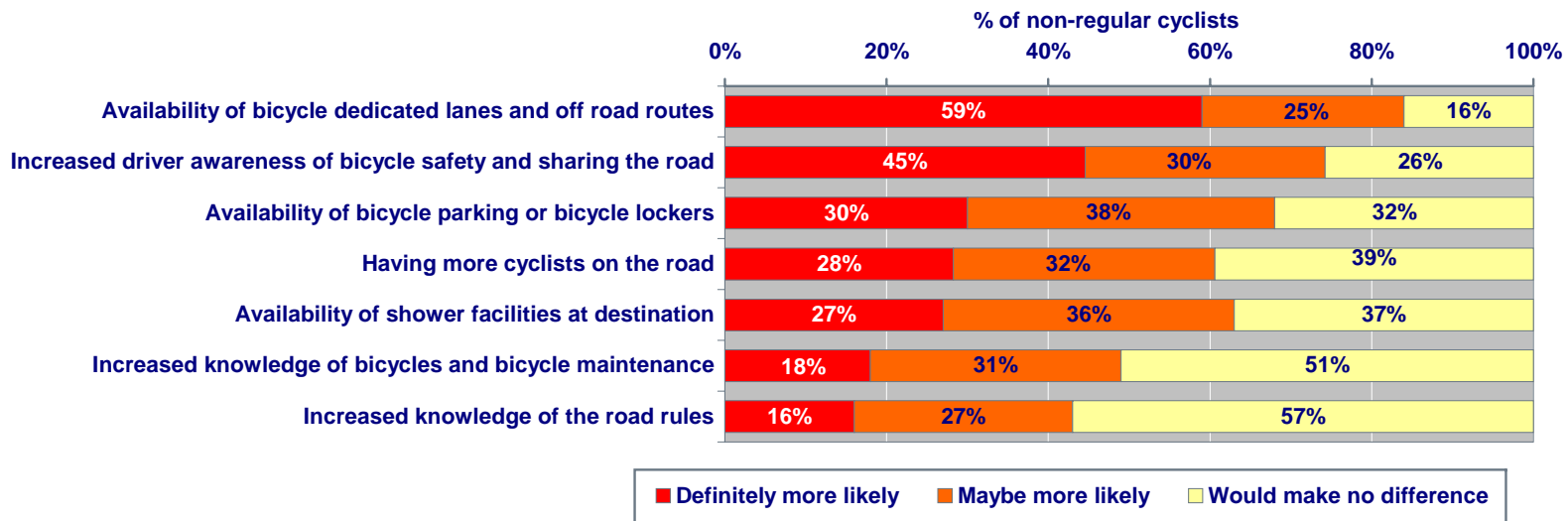
The most commonly given reason for not cycling in the City was that there is too much traffic. It is interesting to note that Infrequent Cyclists were more likely than others to say that they don't cycle in the City because they don't feel comfortable in the shoulder lanes near parked cars.

It is not surprising to note that Non-cyclists were slightly more likely than Infrequent or Potential Cyclists to say that they don't cycle in the City because they need their car.



Non-regular cyclists

What would make your cycle more regularly



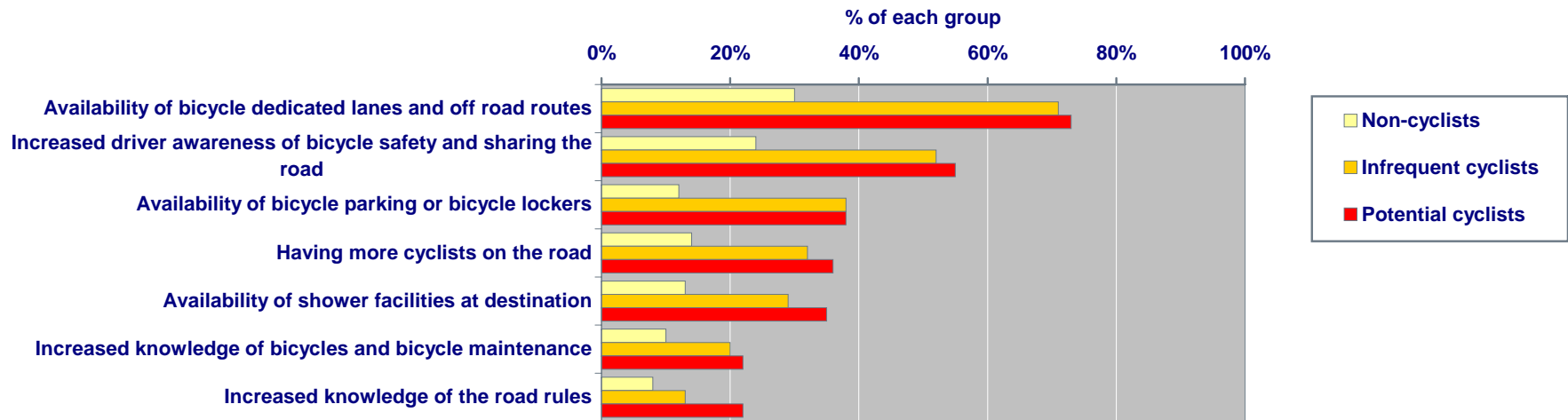
Availability of bicycle dedicated lanes and off road routes and increased driver awareness were the two most popular options in terms of increasing the frequency of cycling.

Although increased knowledge of the road rules was least likely to encourage Infrequent and non-cyclists to cycle more frequently, it still had the potential to impact two in five non-regular cyclists.



Non-regular cyclists

Definitely would cycle more regularly



Non-regular cyclists were most likely to say that the availability of bike dedicated lanes and off road routes, as well as increased driver awareness of sharing the road and bicycle safety were two things that would encourage them to cycle more often. It is clear that the perception of danger in terms of riding on the road with cars is a significant barrier to cycling more regularly.

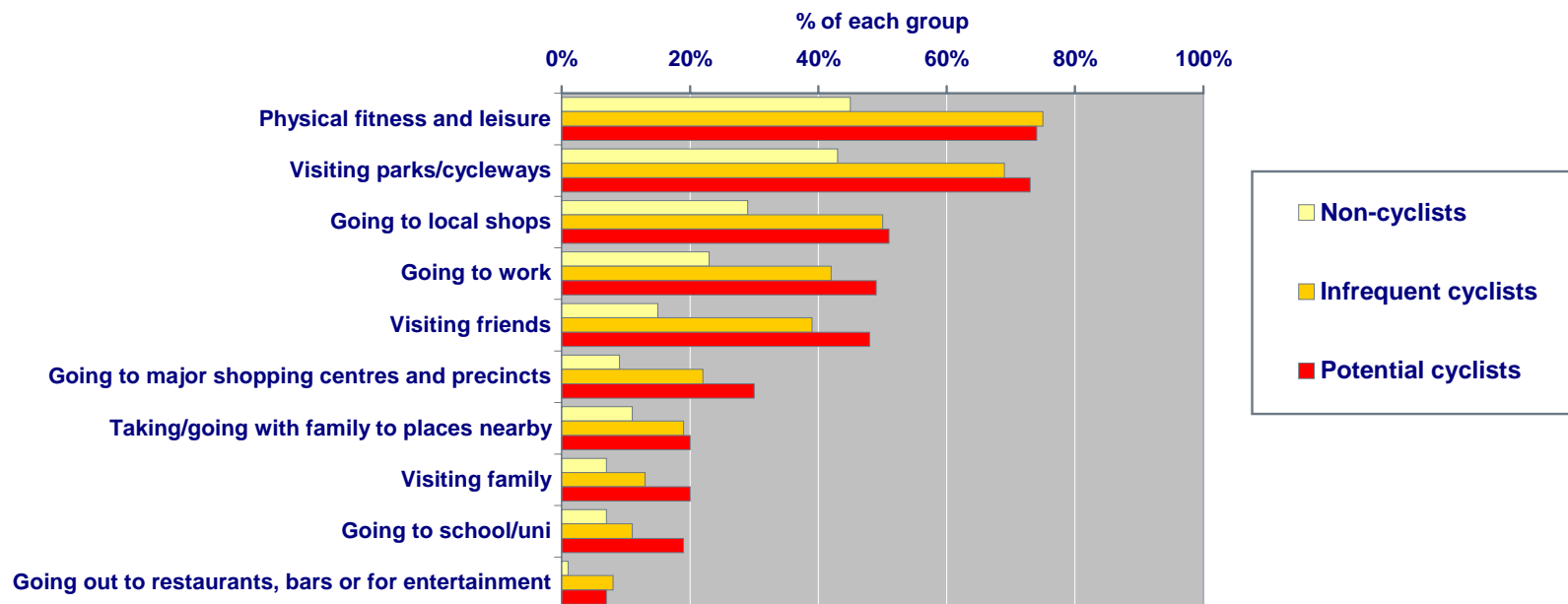
It is not surprising to see that non-cyclists were significantly less likely than Infrequent and Potential Cyclists to indicate that any of the given reasons would encourage them to cycle more often. This is indicative that there is a group of non-cyclists who will never cycle.



Non-regular cyclists

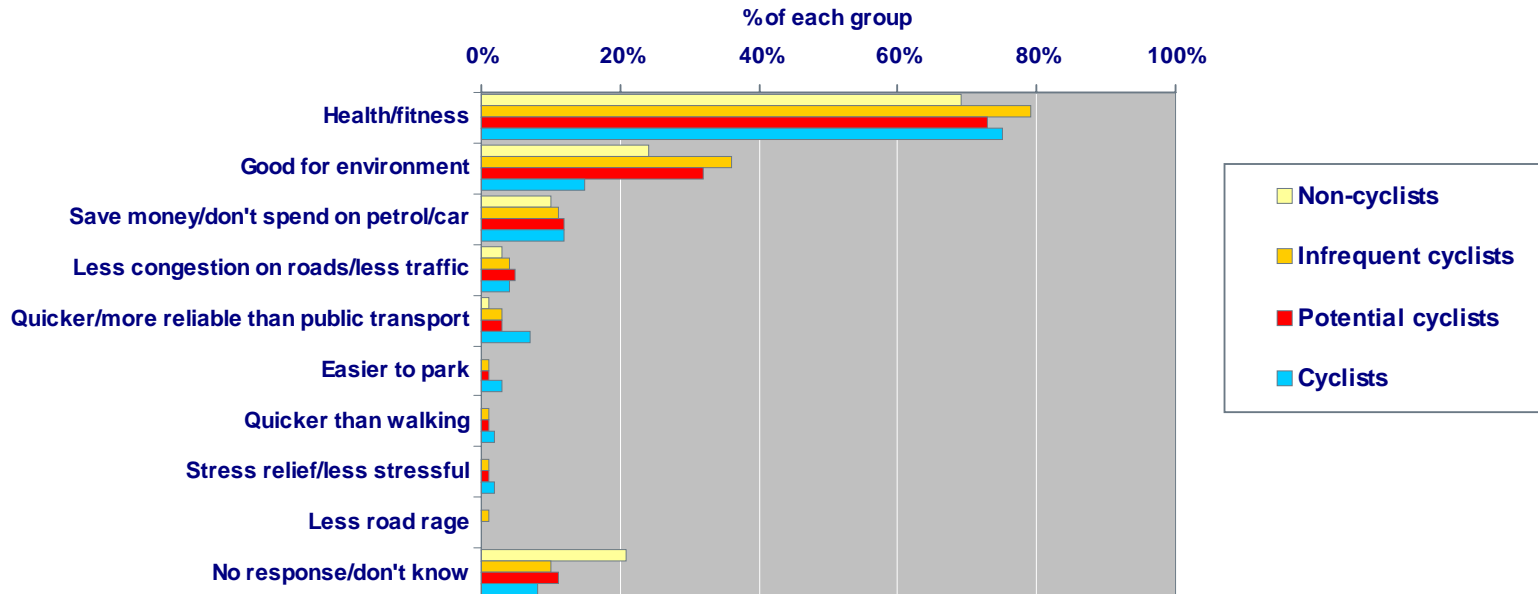
If so, which trips would you be more likely to make?

Non-regular cyclists who said they were definitely or maybe more likely to cycle given the initiatives listed on the previous page were then asked which trips they would be more likely to make. The graph below shows that fitness and bicycle-specific leisure trips were more likely to be influenced than other types of trips.



Perceived benefits of cycling

All respondents were asked to name the main benefits of cycling. The coded responses are shown below analysed across the different segments

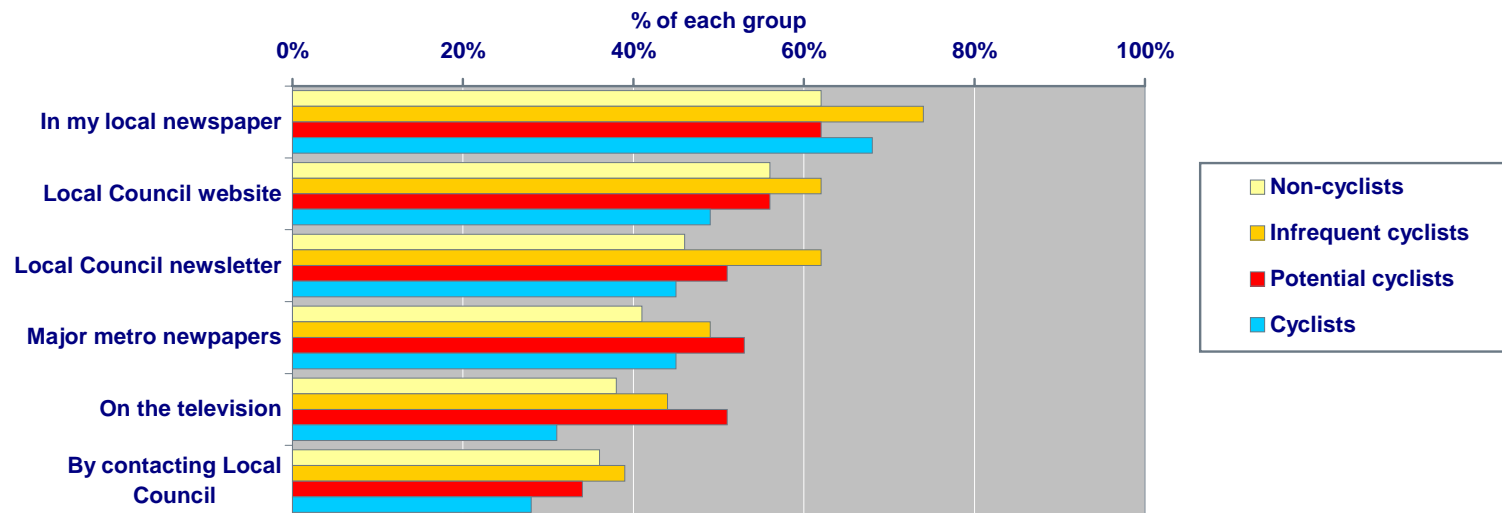


Health and fitness were by far the most commonly mentioned benefits of cycling - this sentiment was reasonably consistent across all segments. This was followed by the environmental benefits. Interestingly, regular cyclists were the least likely segment to nominate the environmental benefits of cycling, while Infrequent and Potential Cyclists were the most likely. The perceived benefits of travel time and less traffic congestion were rated much lower, with the money saving benefits considered slightly more important.



Media and information

Where would you expect to find information about govt. cycling programs and initiatives?



Local newspapers and local council communications such as website and newsletter were the most commonly given responses in terms of where respondents would expect to find information about cycling programs and initiatives.

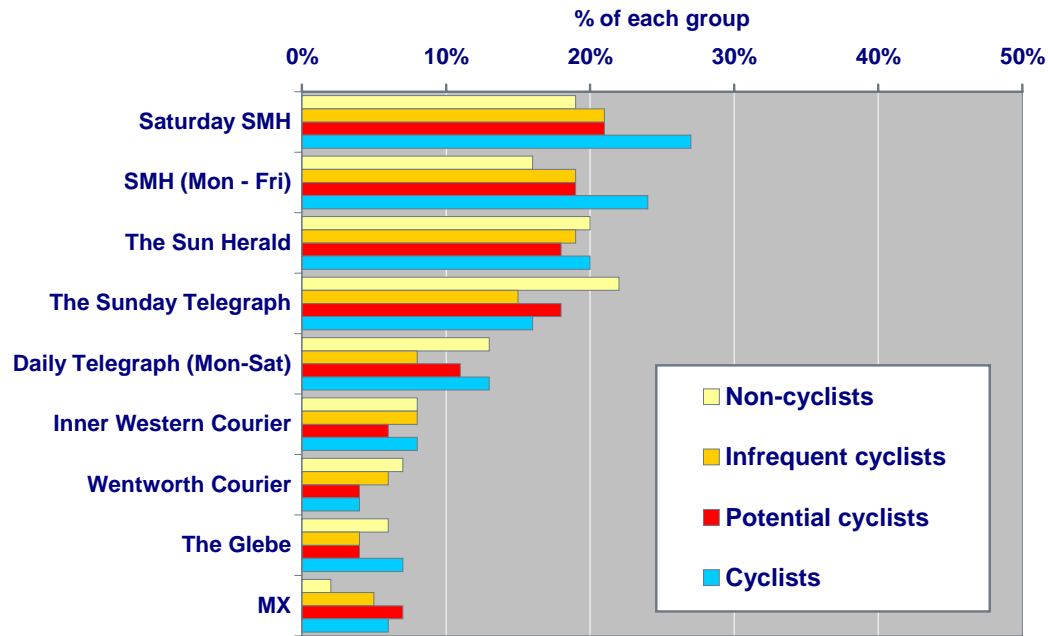
It is interesting to note that while Infrequent Cyclists were more likely than others to expect to find this information in a local newspaper or hear from the local council, Potential Cyclists were more likely than others to look to on mass media such as major metro newspapers and television.



Media and information

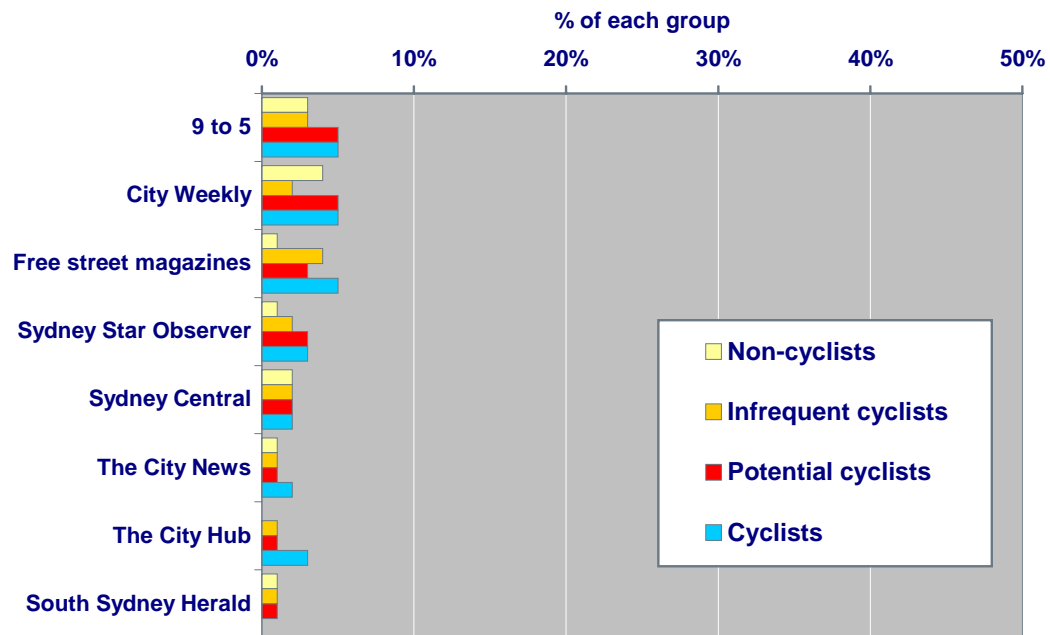
Readership: read every/nearly every issue

The graphs on the following pages show readership of a range of newspapers and magazines.



Media and information

Readership con't: read every/nearly every issue

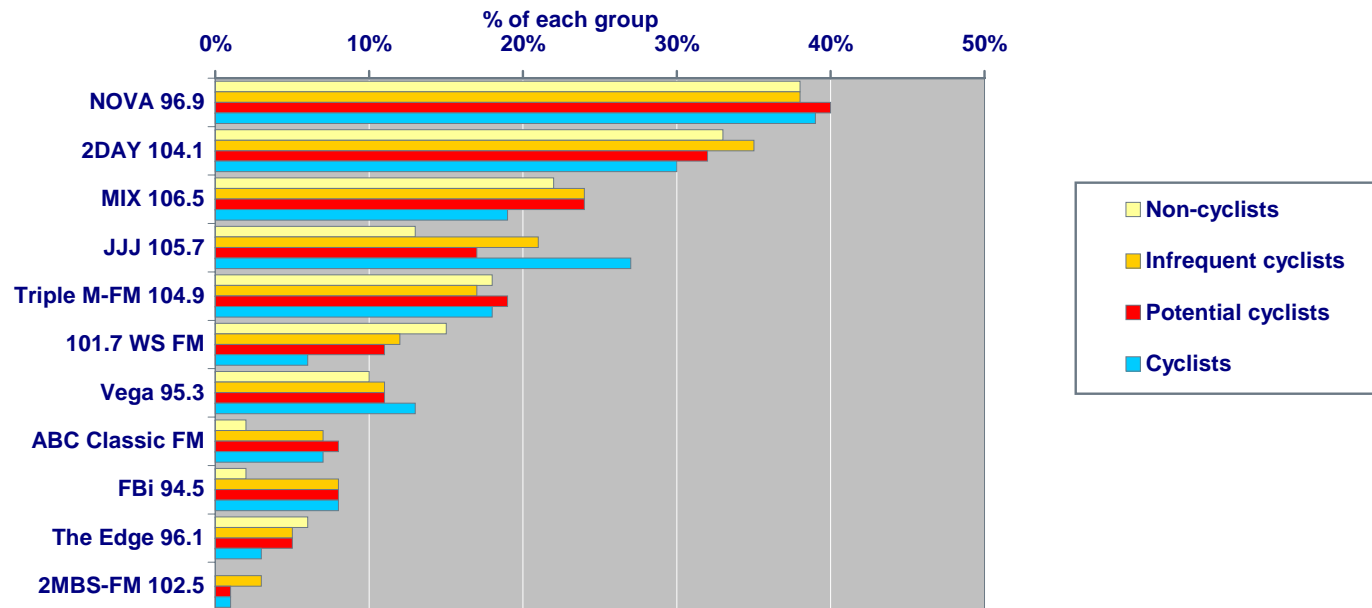


Regular cyclists tended to be more likely to read most of the listed publications than non-regular cyclists.



Media and information

Radio stations listened to the most: FM

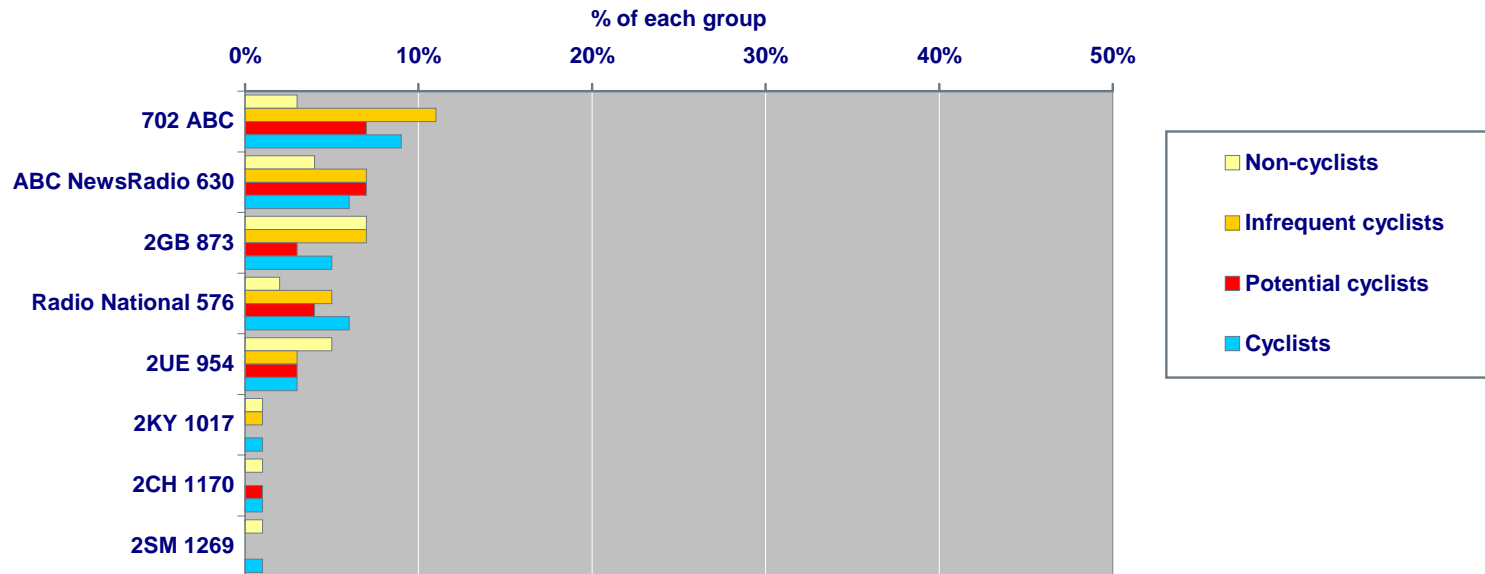


Looking at the graph depicting FM listening, and on the following page depicting AM listening, we can see that regular cyclists had similar radio listening patterns to non-regular cyclists, except for being more likely than others to listen to Triple J and less likely to listen to WFSM. Around 8% of respondents indicated that they did not listen to the radio. The listening patterns described in this report are similar to published radio rating describing overall Sydney listening. This reflects the age group (18-50) and residence of the sample (10km Sydney catchment).



Media and information

Radio stations listened to the most: AM



Drilling down further

The following section explores the data in more detail to answer some key questions raised by the City Of Sydney. The areas of investigation were:

- Gender differences
- Sydney LGA residents
- The Potential Cyclist segment

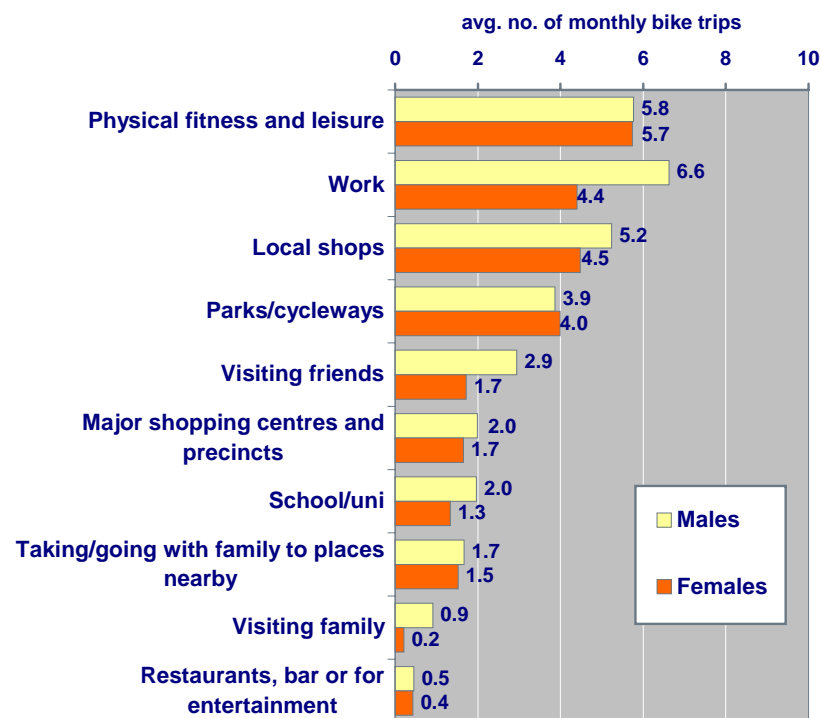


Gender differences

As was previously reported, males in the 10km catchment show a greater propensity to cycle (40% of males cycled at least once a month, while 13% of females surveyed cycled monthly).

Gender cycling frequency

As the chart shows, men cyclists, as well as being more common, are generally more frequent than females with their cycling on the list of trip types surveyed. However, an interesting comparison is for 'physical fitness and leisure and 'parks/cycleways', where women show a similar frequency as men, indicating the importance of fitness and pleasure has amongst women cyclists.



Reasons for not cycling

On the other hand, females were more likely to fall into the Infrequent and Potential Cyclist segments (non-regular cyclists) than men, indicating that there are possibilities in attracting more women to cycling.

Females 25-34 years old (47%) were the most likely age group to be either Infrequent or Potential Cyclists.

When analysing the reasons why these two groups don't cycle more often, some key gender differences emerge. The reason women are more likely to give than men for not cycling more often is because it is **'dangerous to ride on the road' (53% to 40%)**. The other reasons tested, such as workplace facilities and family obligations, weren't divided as strongly across gender.

In terms of why females don't ride more often in the CBD, similar safety issues emerged:

- Too much traffic in the CBD (females 86%, males 74%)
- I don't feel comfortable in shoulder lanes near parked cars (females 60%, males 46%)
- I only feel comfortable/safe riding on off-road pathways (females 49%, males 34%)

Females were also more likely to nominate feeling silly wearing their helmet and bike gear as a reason for not cycling more often than men (females 18%, males 11%).

What would make you cycle more often

When asked about factors that would make them cycle more often, females were generally more likely than men to nominate the initiatives mentioned.

Would make you cycle more regularly	Non-regular cyclists	
	Males	Females
Availability of bicycle dedicated lanes and off road routes	69%	74%
Increased driver awareness of bicycle safety and sharing the road	49%	56%
Availability of bicycle parking or bicycle lockers	33%	41%
Having more cyclists on the road	31%	36%
Availability of shower facilities at destination	36%	32%
Increased knowledge of bicycles and bicycle maintenance	18%	23%
Increased knowledge of the road rules	12%	22%

It seems that women would be more likely to consider cycling more frequently if some of these (mainly safety based) issues were communicated and implemented effectively. The focus group phase of the research will allow us to investigate how best to target females and their likelihood of cycling more often given the implementation of various initiatives.

Interestingly when asked which trips they would be more likely to make given the various initiatives, the non-regular females cyclists exhibited a similar pattern to current female cyclists. That is, if some of these initiatives were introduced they too would tend to want to cycle for physical fitness and leisure and to visit parks and cycleways rather than to work (when compared with men).

Information, media, gender and cycling

Consistent with their desire for more cycling initiatives to prompt them to cycle more regularly, non-regular female cyclists expected to find information about these kinds of initiatives (whether from local, state or federal governments) in all of the sources listed (local newspaper, television, Local Council newsletter, Local Council website, by contacting Local Council).

Generally, female print consumption was similar to males. Although Infrequent and Potential female cyclists were slightly more likely than their male counterparts to read the Sunday papers

(Herald and Telegraph) and local newspapers such as the Inner Western Courier, The Wentworth Courier, The Glebe.

Similarly, radio listening was reasonably consistent across gender with some typical exceptions – non-regular female cyclists were more likely than the equivalent males to listen to Nova, 2DayFM and MIX106.5.



Sydney LGA residents

While residents from the Sydney LGA were as likely as other respondents in the 10km catchment to be regular cyclists (21%), they were more likely to show a 'potential' to cycle more given the right condition – 45 % of the Sydney LGA residents surveyed fell into this Potential Cyclist group.

Monthly cyclists from the Sydney LGA were generally more likely to make more monthly trips for a range of reasons than other respondents in the 10km catchment – from work trips, fitness trips to visiting shops.

Reasons for not cycling

Those from the Sydney LGA who identified as Infrequent or Potential Cyclists (non-regular) were more likely than others in the 10km catchment to nominate safety concerns as a reason they do not cycle more often (55% to 47%). They were also slightly more likely to nominate that their 'workplace doesn't have facilities for bikes' as a reason for not cycling (17% to 14%).

When it comes to cycling in the CBD, Sydney LGA residents' reasons for not cycling more often were similar to non-regular cyclists from elsewhere in the 10km. They are just as concerned about traffic, shoulder lanes and off road cycling lanes as everyone else.



What would make you cycle more often

The table below shows what make Sydney LGA residents cycle more often (compared with the rest of the 10km catchment).

Would make you cycle more regularly	Non-regular cyclists	
	Sydney LGA	Other 10km catch
Availability of bicycle dedicated lanes and off road routes	75%	71%
Increased driver awareness of bicycle safety and sharing the road	60%	52%
Availability of bicycle parking or bicycle lockers	42%	37%
Availability of shower facilities at destination	36%	32%
Having more cyclists on the road	33%	35%
Increased knowledge of the road rules	23%	18%
Increased knowledge of bicycles and bicycle maintenance	19%	22%

Sydney LGA residents, on the whole, show an interest in the initiatives tested to get them cycling more often.

The trips Sydney LGA residents would be most likely to make given the implementation of these initiatives would be to work, to

university (not surprising given the preponderance of students in the Sydney LGA) and to visit friends. Shopping and physical fitness were less of a motivation.

Information, media, residence and cycling

The sources non-regular Sydney LGA cyclists expected to find information about cycling programs and initiatives (whether from local, state or federal governments) were generally consistent with others in the 10km catchment – they generally felt that local media (local newspapers, council newsletters and website) would communicate the initiatives.

As would befit their demographic and psychographic make-up, Infrequent and Potential Sydney LGA cyclists showed quite a distinct print consumption profile compared with others in the 10km catchment. They were all avid Herald readers (during the week and on Saturdays) but less keen on the Sunday papers and the Telegraph. While they showed a propensity to read the Sydney Star Observer and the free City publications (MX, 9 to 5 and City Weekly), they were less likely to read the local newspapers listed on the survey (interesting given they felt that local papers would be the source for cycling initiatives).

Perhaps more surprisingly was that the Sydney LGA's radio listening habits were pretty much consistent with the whole 10km

catchment – the presumption being that the Sydney LGA respondents would be more inclined to listen to ABC stations and some of the smaller broadcasters than the larger commercial FM stations. This was not the case for the sample surveyed.



The Potential Cyclist segment

As outlined previously in the report the Potential Cyclist market (those who do not currently own a bike but are interested in cycling), were more likely to be:

- Female (40%)
- 18 to 34 years old (41%)
- Sydney LGA residents (45%)
- Non-Sydney CBD workers (41%)
- Students (42%)

Their occupations reflect this profile with a propensity to work in the hospitality and tourism industries, as well as more creative jobs (advertising, entertainment, media etc.)

Further investigations into the Potential Cyclist segment shows that when it comes to the transport they use for work, shopping, visiting friends and family, they are more likely than others to walk or use public transport.

Reasons for not cycling

While Potential Cyclists name safety concerns for not cycling more often, the chief reason they gave for not cycling more often was because they don't have a bicycle (83%).

While this finding may not be something that the City Of Sydney can easily act on, it does point to a strong potential market for bike retailers.

When it comes to cycling in the CBD, Potential Cyclists give the same reasons as other non-cyclists for not cycling there more often – too much traffic, dangerous cycling conditions, insufficient provisions for cyclists etc.



What would make you cycle more often

When asked about factors that would make them cycle more often, Potential Cyclists were generally more likely than the other non-cyclists to nominate the initiatives mentioned.

Would make you cycle more regularly	All non-cyclists	Potential cyclists
Availability of bicycle dedicated lanes and off road routes	59%	73%
Increased driver awareness of bicycle safety and sharing the road	45%	55%
Availability of bicycle parking or bicycle lockers	30%	38%
Having more cyclists on the road	28%	36%
Availability of shower facilities at destination	27%	35%
Increased knowledge of bicycles and bicycle maintenance	18%	22%
Increased knowledge of the road rules	16%	22%

The patterns of response is similar to the one seen in the gender analysis where women seem to demonstrate a stronger need for some of these initiatives than men. However, while the Potential

Cyclists do demonstrate a female bias, there are also a number of men in this segment which is borne out by the results to the question about ‘which types of bike trips would you be likely to make if these initiatives were put in place’. In all of the trip types tested (going to work, the shops, visiting friends, fitness etc.) Potential Cyclists were more likely to say they would cycle if these initiatives were introduced (NB. for the gender analysis the main trip types for females were physical fitness and leisure based rather than more day-to-day trips).

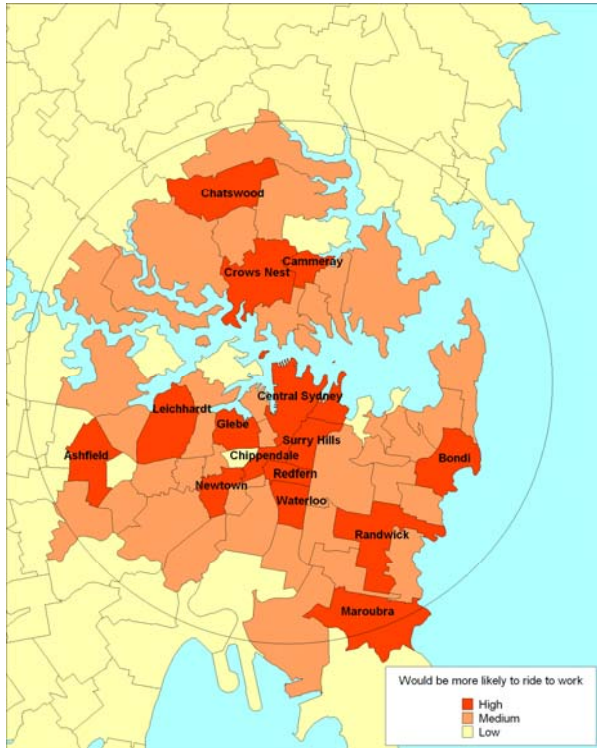
A broad analysis of these results seems to indicate that there is a strong perception amongst this Potential group that the inner City is not an easy place to cycle. Safety issues and the lack of cycling infrastructure are acting as strong barriers ‘to entry’ for this group. Given their demographic profile and their apparent keenness to ride more often (once they get hold of a bike!), it would seem that even some small initiatives to improve the perception of cycling in the inner City could have substantial positive outcomes for this group.

The following catchment maps show the residence of Potential Cyclists who indicated that they would be more likely to cycle to work, to the shops and uni if key initiatives were implemented.



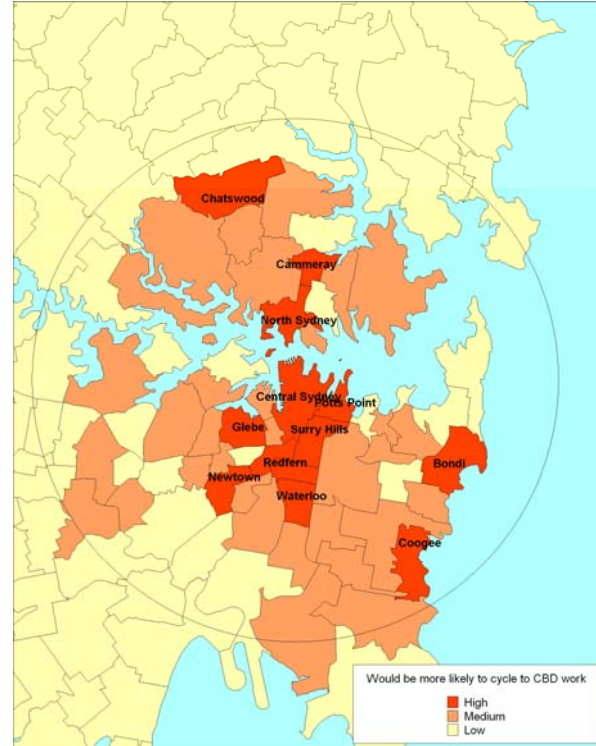
Potential Cyclist catchments

Would be more likely to ride to work



Potential Cyclists from the Sydney LGA show a strong propensity to ride to work if cycling conditions improved.

Would be more likely to ride to CBD work



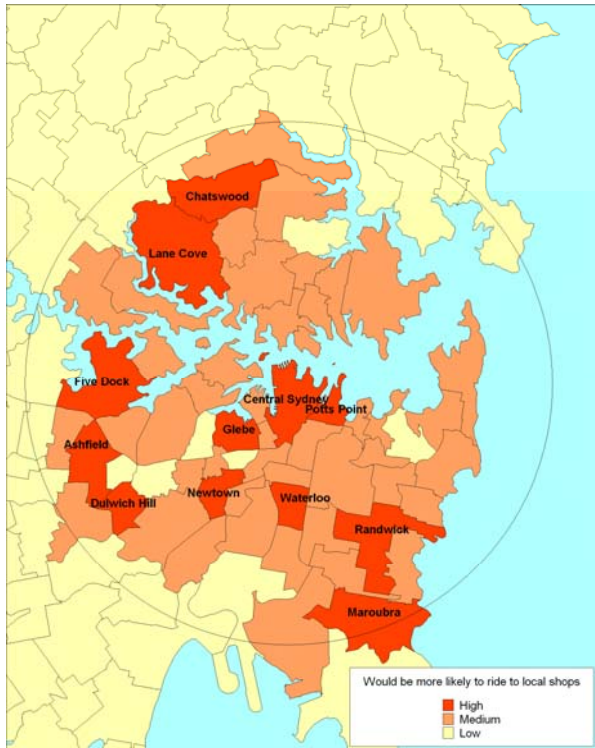
This core of Sydney LGA residents becomes even more pronounced when CBD workers are shown.



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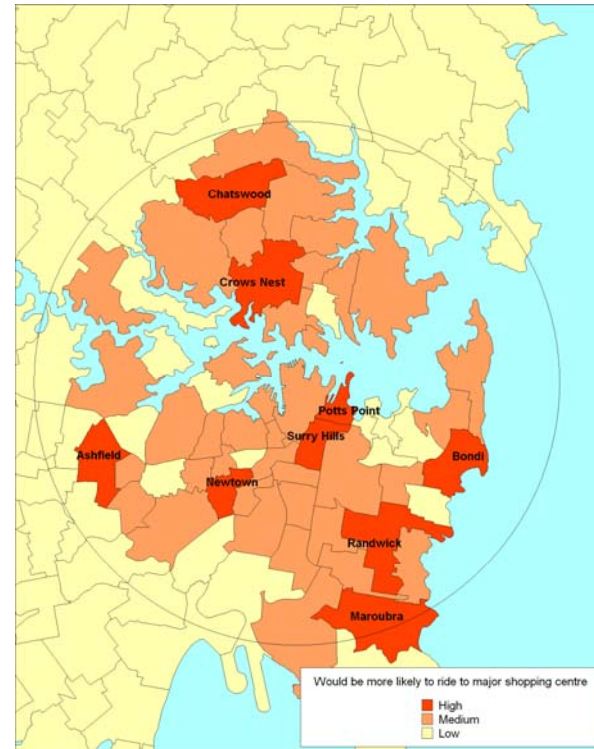
Potential Cyclist catchments

Would be more likely to ride to local shops



Those likely to ride to local shops are much more dispersed, reflecting the locations of some of the key local shopping strips.

Would be more likely to ride to major shopping centre



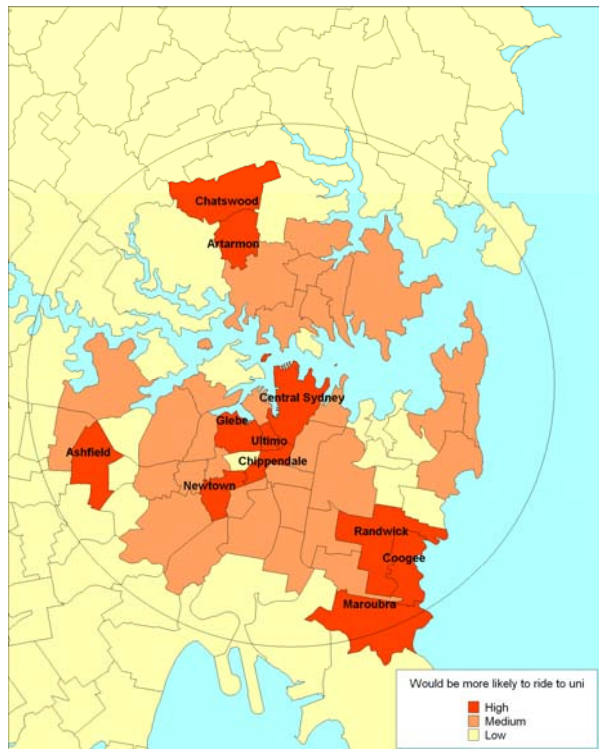
Similarly for major shopping centres, likely riders tend to live near major centres such as Chatswood Chase and Bondi Junction



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Potential Cyclist catchments

Would be more likely to ride to uni



As would be expected, likely riders to uni are mainly found in the suburbs near the University of Sydney and the University of NSW

Information, media and Potential Cyclists

As with much of the sample, Potential Cyclists generally felt that local media (local newspapers, council newsletters and website) would be the place to look for local, state and federal government initiatives about cycling.

Interestingly, this group was the most likely segment to nominate television (51%) as place to find out about cycling initiatives (this is also likely reflective of the younger profile of Potential Cyclists where television tends to be a source of a lot of their information).

This fact is further confirmed when the Potential Cyclists print consumption is analysed. For all the publications tested, the frequency of readership of Potential Cyclists was on par with or slightly below that for the whole sample. Compared with other segments (i.e. regular Cyclists) this group does not read that often, making print communication strategies a more difficult prospect.

Their radio listening was also on par with the total sample – mainstream commercial FM stations and Triple J dominated along with pockets of ABC and some community radio listening.

Appendix

Accident descriptions from the survey

Tabular results

Questionnaire



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Accident descriptions

The following pages show the verbatim descriptions given by those cyclists who reported having an accident in the last 12 months

"was cycling in a shared bike/traffic lane parked car driver opened the door into bike lane and no time for me to stop"
"pedestrian walked sideways as I was passing him and collided at low speed. No injuries that I know of."
"lost control of the bike crashed into a parked car. Split open finger and got 5 stitches. Bad scar"
"hit kerb 1 bicycle smashed both front teeth requiring a one crown and one cap."
"hit by car ; car drove off; minor injuries."
"hit by a car on four separate incidents. One wrote the bike off requiring a new machine under the driver's insurance another was a hit and run by a taxi broke the front wheel of the bike. Side swiped by cars twice one because the car tried to push me"
"fell over"
"fell off"
"collision pedestrian came out of shop"
"car door opening - bike damaged countless grazes and sore stomach"
"Yesterday - knocked from my bicycle but a driver who passed me and immediately turned left into a street. I collided with the rear passenger door and suffered scratches and sprained wrist. 12 months ago a council bus overtook me and when he was abreast wit"
"While cycling up King St Newtown a car driver opened his parked car door without checking for traffic first & I collided with his door hit my mouth on top of door and lost 2 front teeth. 1 bicycle 1 car involved"
"Pedestrian walked out between two parked cars. Avoid pedestrian but suffered back pain as did a front wheel stand. (was travelling about 30km and had to brake suddenly)"
"Only self was involved. Misjudged the steepness of slope and didn't use brakes and gears to prevent fall."



<p>"Mountain Biking Injuries - Severe bruising and many painful scrapes and grazes on elbows knees shins and shoulders"</p>
<p>"I was hit by a car coming out of a petrol station. No injuries. Car did not stop! I hit a pedestrian who walked out onto the road between two cars without looking."</p>
<p>"I used to ride into the CBD for work every day but had to stop because it was becoming dangerous. I encountered quite a few incidents where motorists would either not give way to me at intersections where I had right of way or would not allow me enough"</p>
<p>"I hit a rollerblader on a cycle way. My injury was a sprained wrist cut knee and elbow"</p>
<p>"I had couple of accident when driver didn't check the back mirror and opened the front door right in front of me."</p>
<p>"Hit by 2 cars. Both drivers did not see me or look for me. No major damage - few grazes bruises and cuts."</p>
<p>"Driver opened car door without checking for traffic. I ran into the car door knocked off bike onto ground. A few grazes."</p>
<p>"Driver of 4X4 opened door in front of me without checking her rear mirror. I hit her and the door but not too hard. No damage to either her me car or bike. Just wounded pride."</p>
<p>"Cold wet winter's night - a young driver slowed but failed to give way to me at a T intersection. She said she hadn't seen me perhaps because there were so many lights streaking and shining across the wet road. I was knocked to the ground in front of her"</p>
<p>"Car was changing lanes and hit me. Only the one car and myself were involved. Resulted in a dislocated foot."</p>
<p>"Car door - somebody opened car door as I approached swerved to miss but clipped handle bars. bruising across ribs and grazes arms and legs. Pedestrian - turning off busy road pedestrian walked on `red man` & we collided. unsure of their injuries suffer"</p>
<p>"Bicycle got hit by car while stopping for red light"</p>
<p>"All cars and mostly taxi's. Injuries include broken fingers and back injuries.</p>
<p>Accident with a bus firstly then with a car .First was a broken elbow and surgery to my index finger and bruises and scrapes to my right hand".</p>
<p>"A vehicle turned left in front of me while I was on their left hand side. I came off my bike after hitting the brakes hard."</p>



"A car pulled out from a side street in front of me as I was travelling east along Military Road Cremorne. I hit the drivers side 1/4 panel and went over the bonnet. I had scratches and bruises and a bent bike. The stupid driver tried to blame me for it"

"1. was hit by a car which changed lanes without looking grazed knuckle only. 2. hit by car driver opening his door no personal injury but bike damaged beyond repair bike replaced under driver's insurance. 3. hit by taxi exiting driveway front wheel of"





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