



Environmetrics
social and market research

Report

Sydney cycling research: focus groups

prepared for
City Of Sydney

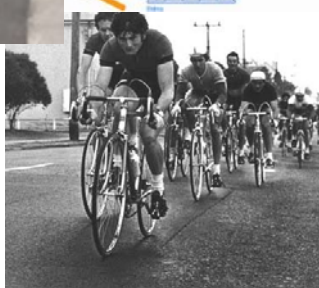
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February 2007

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Ref: 2357



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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.

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 focus group phase. A separate report was produced detailing the results from the internet survey.



Focus groups

Using the cycling behaviour and profile data from the internet survey, three key segments were identified for the focus groups.

Group	Gender	Age	Residence	Cycling behaviour
1 Semi-regular cyclists	Mixed	25-40 years	5km-10km from CBD	Own a bike and cycle at least twice a week. May cycle to work or shopping or for fitness
2 Potential cyclists (Sydney LGA)	Mixed	25-40 years	Within Sydney LGA	May own a bike that they don't ride very often (i.e. less than once a month) or may be interested in getting a bike in the future (to use for riding to work/fitness/around the local area etc.)
3 Potential cyclists (females under 35)	Female	21-35 years	5km or more from CBD	

Participants were selected from large databases of people who have agreed to take part in focus group research. The criteria above were used for selection.

Each group comprised 7 people and lasted around one and half hours.

The groups were held on Jan 30, Jan 31 and Feb 1 in the evening at the City of Sydney.

A discussion guide was developed to cover the topics of discussion for each segment. Broadly, the topics covered:

- Current lifestyle behaviours – work, leisure, shopping, fitness etc.
- Cycling history
- Current cycling behaviour – frequency, reasons for, where they cycle
- Perceived benefits of cycling
- Main barriers to cycling more often and in different areas
- Reaction to current cycling infrastructure (visual examples shown)
- Sources they go to for information, media consumption.

See Appendix for a full copy of the discussion guides.



A note to the reader

In preparing this report we have presented and interpreted information that we believed relevant for completing the agreed task in a professional manner. It is important you understand that while we have sought to ensure the accuracy of all the information incorporated into this report, data derived from focus groups are estimates and should be regarded as such. 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. We are more than happy to discuss the analysis and recommendations with you and would be willing to incorporate any of your own knowledge and observations into the report.



Executive summary

- The segments selected for this qualitative research all exhibited a propensity to cycle more in the future given the right infrastructure, education and awareness raising strategies – whether it be to cycle more regularly than they currently do or to convert the interest they have in cycling to actual behaviour change.
- Currently, the major barrier for these segments is the perception that, expect for a few exceptions, Sydney is not a very bike-friendly city. Road design, perceived lack of cycling infrastructure and a relatively under-developed cycling culture in the City has led to this perception. So too has cycling accidents (whether to them personally or to people they know) and the aggressive nature of Sydney’s drivers (car and bus).
- All the segments see cycling as an excellent and practical way to keep fit. Their primary motivator for cycling more would be fitness and recreation, followed by cost and time saving. Environmental benefits, while acknowledged by most participants, were usually secondary to the more individual benefits of cycling.
- Most of the focus groups participants reported a lack of awareness about current cycling routes and infrastructure in and around the City. When shown visuals of current cycling infrastructure most were surprised it was there. This is an important point, given that most of the participants lived in or close to the City or visited it reasonably regularly. The visibility of cycling infrastructure is as an important as the actual amount and quality of cycling infrastructure. This has implications for the design, ‘branding’ and signage of cycling infrastructure (e.g. the green contraflow lanes were well liked by most participants because they sent out a clear message that the road caters for cyclists.).
- Knowledge of safe cycling routes into and across the City was also low – leading many participants to keep to their own patch when it came to cycling. There was an articulated demand for easily accessible maps of cycling routes (with a website the most commonly suggested source for this information). These routes did not necessarily have to comprise 100% cycling infrastructure, but rather, needed to be identified as safer than the main vehicular thoroughfares.
- Of the infrastructure examples shown to the participants, obviously those paths the furthest away from traffic and pedestrians were the



most favoured (e.g. wide shared paths such as Prince Alfred Park, shared lanes on Anzac Parade). Contraflows were also generally well liked and considered a safer option than riding with the traffic. Shoulder lanes were of the most concern because of the danger of opening car doors. Bus lanes and bus drivers were the most feared.



Recommendations

As reported, there were many common attitudes and perceptions across the different segments researched. In terms of future strategies for the City Of Sydney, we see the following areas as vital to increasing cycling participation amongst these key segments.

Information

The 'entry/re-entry' into cycling for potential cyclists or the increase in cycling trips for current cyclists is dependent on easily accessible information sources. The internet is the most logical place for this, with the site host less important than the actual content. It doesn't really matter whether the City Of Sydney, the RTA or an independent body (e.g. www.cycle.com.au) hosts the site, just as long as the content can easily be found through a Google search. Information required on a website (and associated media) should include:

- Road laws and cyclists rights
- A map of current 'approved' cycling routes through out the City
- Tips on maintenance
- A calendar of cycling related events
- Links to other relevant sites

Cycling routes

There is a need for an established network of cycling routes across Sydney (or within 10km of the CBD). These routes need to be easily identified while riding (e.g. numbered routes and signs) and easily 'researched' on the web before the trip.

There is the opportunity to grade the routes on factors such as 'ease of ride' and 'safety' so cyclists know what they are getting themselves into.

Infrastructure perception

Connected with this network of cycling routes are further improvements in cycling infrastructure and perhaps more importantly, a stronger perceived presence of cycling infrastructure (e.g. the green lanes of the contraflows, a series of branded signs that quickly and effectively communicate cycling lanes).



No one expected cycling lanes to be present on every Sydney road. Rather, important infrastructure links should be developed to connect bike-friendly roads and thereby establishing proper cycling routes.

Promotion

The promotion of cycling's benefits needs to be promoted along with the information resources and current and future infrastructure developments.

It is likely that future promotional strategies can start at a local and/or grass roots level – cycling as a way to engage and improve your local community.

From there, promotional strategies should encourage the cycling segments to 'explore' their City and consider cycling for trips where they previously walked, drove or used public transport. If done effectively, this strategy is likely to have a snowballing effect amongst the 'primed' cycling segments (i.e. semi-regular and potential cyclists), where they realise that cycling to and around areas away from their local patch is not that difficult (and in fact quite pleasurable!) or cycling for different reasons than usual (e.g. giving cycling to work a go) is also a relatively easy thing to do and further exposes them to the benefits of cycling.

Focus groups summaries

The table below provides a quick summary of the attitudes of each of the groups researched, as well as recommended future steps to increase their cycling frequency.

Group	Cycling benefits	Barriers to cycling	What would get them cycling more? Initiatives and messages
1 Semi-regular cyclists	Fitness Cost Time saving	Traffic and safety No-go zones in Sydney Lack of cycling culture in Sydney	Stronger promotion that Sydney is a bike-friendly City Encourage them to explore their City on bike
2 Potential cyclists (Sydney LGA)	Fitness Alternative to car Cost	Traffic and safety Perceived lack of cycling infrastructure and routes The planning required	Stronger promotion that Sydney is a bike-friendly City Cycling as a way of engaging with and improving the local community
3 Potential cyclists (females under 35)	Fitness and fun Social	Traffic and safety Confidence/self consciousness The planning required	Cycling is not as dangerous or as difficult as it looks Cycling is a great way to get fit Cycling is a great way to get around Sydney & a great way to have fun with friends

Full details of each of the groups are shown in the next section.

Detailed summaries

The following section summarises the key behaviours and attitudes of the three focus groups in more detail.

1. Semi-regular cyclists

Group	Gender	Age	Residence	Cycling behaviour
1 Semi-regular cyclists	Mixed	25-40 years	5km-10km from CBD	Own a bike and cycle at least twice a week. May cycle to work or shopping or for fitness
2 Potential cyclists (Sydney LGA)	Mixed	25-40 years	Within Sydney LGA	May own a bike that they don't ride very often (i.e. less than once a month) or may be interested in getting a bike in the future (to use for riding to work/fitness/around the local area etc.)
3 Potential cyclists (females under 35)	Female	21-35 years	5km or more from CBD	

Background

Suburbs lived in: Kensington, Bondi Junction, Summer Hill, Bronte, Marrickville

Employment: Sales, teacher, fork lift driver, PA, accounts, auditor, finance.

Lifestyle

Most of the participants worked 9 to 5. One worked far afield (Milperra), but most worked reasonably close to the home (about 4 worked in the City). Most used public transport during the week for work.

Most were reasonably health conscious and engaged in a regular fitness pastime (e.g. jogging, gym walking, as well as cycling).

They tended to keep to their local patch on the weekend for shopping and leisure (eating out, drinks, movies etc.). Most, but not all had a car. It was generally used for the once-a-week grocery shop, visiting friends (out of their area) and going out (out of their area).

Their peer groups led similar lifestyles.

1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

Cycling behaviour

Most cycled in their own area. Fitness was a key driver for cycling although it was often incorporated into their social outings (e.g. riding with a friend down to La Perouse, going out at night on the weekend in Newtown). One cycled to work about 2 or 3 times per week. Two or 3 cycled purely for leisure along a well-known path local to them (e.g. Centennial Park).

Cycling history

Many had given up cycling after their adolescence only to take it up again in their 20s. Often this was because someone gave them a bike. Saving money on car or public transport costs was usually a secondary (although important) reason for taking up cycling again.

Cycling benefits

Fitness

Fitness was the most mentioned benefit of cycling. It was seen as efficient fitness because when you cycle to somewhere you are also getting a workout. It was less time consuming than having to go to the gym or undertake a separate fitness program.

Being alone and in the open air was also a benefit compared with other exercise (e.g. the gym), which was often seen as crowded and “too indoors”.

Cost

The next most mentioned benefit (although generally secondary to fitness) was cost saving.

“I save myself \$30 to \$40 a week which is nothing to be sneezed at.”

“I used to catch taxis home from a night out all the time and it just seemed ridiculous.”

Convenience and time saving

For particular trips (e.g. work or going out at night, for a couple of participants) cycling was often the quickest and most convenient way of travelling. However, for other trips, such as shopping, it was less preferred.



1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

“I used to go up to the shops on the bike and come home with bags of shopping, now with the car it is just easier to drive up to Broadway. I know it’s bad but the convenience is just too tempting.”

Environment

When probed further some mentioned the environmental benefits of cycling. They felt that given the current talk about climate change it made them feel that cycling was especially worthwhile at the moment.

“If it keeps one car off the road, that is good.”

However the environmental benefit of cycling was not something spontaneously mentioned by many group participants.

Barriers to cycling

Traffic and safety

Traffic and safety were the main reasons they didn’t cycle more frequently and also major factors in why they didn’t cycle further afield from their own patch.

No-go zones

There were strong perceptions that once they hit areas closer to the City (e.g. Oxford St, Parramatta Road) that cycling was too dangerous.

Some had countering this by working out ‘back routes’ which ran more or less parallel to the main thoroughfares and were more cycling friendly (e.g. though Haberfield, Five Dock and Glebe instead of Parramatta road). Others had tried the main thoroughfares once or twice and never tried again.

Cycling culture and infrastructure

Most felt that the majority of car drivers and buses were fairly oblivious to cyclists and therefore posed a danger. However, this was compounded by the perception of poor cycling infrastructure that made it hard for cars and buses to co-exist with cyclists, as well as the general lack of cyclists on the road that would otherwise promote a stronger cycling culture on our roads (like in parts of Europe).

1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

Trip end facilities

For some who worked in the City, access to trip end facilities was a major plus and a key motivator for cycling. For others, depending on their jobs, this was not much of an issue and for the fitness-only cyclists it was irrelevant.

Accidents

Only one participant report of a major accident where they were knocked off their bike by a car and suffered reasonably serious grazing. Others had many near misses.

All however were quite magnanimous when it came to the dangers. They realised that incidents were not always the fault of drivers or pedestrians.

“We all have moments where we don’t look, whether as a driver, cyclist or pedestrian. It’s not hard to do.”

Most felt that the best way to minimise accidents (which would always happen to some degree) is improved infrastructure.

Routes and linkages

Most were unfamiliar with defined cycling routes into and through the City. They were keen to know more.

Also important were small yet significant linkages that could help cycling flow through (the Wilson St contra flow was a good example which linked Chippendale with Newtown without cyclists having to navigate King Street).

“They don’t have to be long cycling paths all through the city, just the right cycling path in the right place to help you avoid some of the trickier spots.”

Finding out about cycling

Similarly, many semi-regular cyclists were not sure where they would look for more information about cycling.

Many presumed that there are websites that exist outlining cycling routes, but they were not sure where they would look and none had accessed a cycling related site recently. Suggestions of where they *would* look included the City of Sydney, cycling organisations, cycling blogs and cycling shops.

1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

The Law

There was a sense that many participants needed to know more about their rights as cyclists and what they can and can't do. Most had 'stumbled upon' cycling as part of their life and worked out the road rules themselves. But they felt they could know more to give them extra confidence on the road.

There were a couple of suggestions that there could be a government approved brochure outlining cycling laws available at cycling retailers, the RTA and on-line.

"When you a buy a new bike, it should be mandatory for the shop to give you a brochure outlining all the rules."

What would get them cycling more often?

This group needs to know that cycling is a safe and pleasurable experience, not just in local areas they know well, but also in other parts of Sydney.

This is a group already keen on cycling, yet there is considerable room for them to cycle more often and for other reasons. They need to know that Sydney is a bike-friendly place and that routes exist throughout the City that allow for relatively easy cycling. It is likely that once this group have tried one or two different places to cycle they will be encouraged to further explore the City for cycling. They are also likely to move from more fitness/recreation based cycling into commuting once they have experience other cycling routes.

It is likely that this segment will be convinced of Sydney's bike-friendliness when they see more obvious cycling infrastructure (and more cyclists).

Combined with this raising of awareness of cycling infrastructure is the need to educate this segment about their rights as cyclists and the road laws. Currently, this barrier is also contributing to their slightly conservative approach to cycling in Sydney.



2. Potential cyclists (Sydney LGA)

Group	Gender	Age	Residence	Cycling behaviour
1 Semi-regular cyclists	Mixed	25-40 years	5km-10km from CBD	Own a bike and cycle at least twice a week. May cycle to work or shopping or for fitness
2 Potential cyclists (Sydney LGA)	Mixed	25-40 years	Within Sydney LGA	May own a bike that they don't ride very often (i.e. less than once a month) or may be interested in getting a bike in the future (to use for riding to work/fitness/around the local area etc.)
3 Potential cyclists (females under 35)	Female	21-35 years	5km or more from CBD	May own a bike that they don't ride very often (i.e. less than once a month) or may be interested in getting a bike in the future (to use for riding to work/fitness/around the local area etc.)

Background

Suburbs lived in: Newtown, Potts Point, Surry Hills, Camperdown, and Darlinghurst.

Employment: Public Service, Recruitment, legal, finance, student, admin.

Lifestyle

Most of the participants worked 9 to 5. Two worked in the City, 4 on the north shore and one in Rosebery.

As with the semi-regular cyclists, these potential cyclists tended to keep to their local patch for shopping and leisure. Half of the participants had a car, the other half didn't. On the whole, however, they were more 'anti-car' than the semi-regular cyclists. This owed as much to where they lived and cost, as to any environmental or ethical stance against cars. The reasons given for not having a car were the lack of use of the car (and the expense in keeping it running) and difficulty in parking in their local area. Most used public transport during the week for either work or leisure and only one participant drove to work (Newtown to Chatswood).

1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

Cycling behaviour and history

A couple of participants cycled once a month or less for “a bit of fun”. The others used to cycle but had given up because of the perceived danger of cycling in Sydney. All were contemplating taking it up again (some had just bought a new bike) but were just finding it hard to motivate themselves.

Cycling benefits

Fitness

Fitness was the most mentioned benefit of cycling and a key potential motivator to get them cycling again. Being able to double up by “getting somewhere” and also “getting exercise” was seen as a strong positive.

“It’s practical fitness”

It was seen as efficient fitness because when you cycle to somewhere you are also getting a workout. It was seen as less time consuming than having to go the gym or undertake a separate fitness program.

As with the semi-regular cyclists, being alone and in the open air was also a benefit compared with other exercise (e.g. the gym).

Alternative to car

Given half did not have a car, cycling was seen as the next best bet (along with public transport) for getting around. Even one participant with a car said that he hardly used it and therefore felt he should be more focussed on cycling.

“I hadn’t driven my car this year at all, I went to start it and it had a flat battery. I thought this is just ridiculous. It sits there doing nothing.”

Cost

Cost was an important factor but perhaps not as strong a motivator as the semi-regular cyclists (who were actually seeing the dollars they saved through their cycling)

Convenience and time saving

This was mentioned by some (especially those who worked in the City), but given most lived close to the City, there was less ‘time-pressure’ on them because they felt they were reasonably close to most things through walking or public transport.

1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

Those who worked on the North Shore felt that the distance was generally too great to cycle (along with the perceived traffic safety issues) and therefore they did not consider riding to work.

Environment

The environmental benefits of cycling were not mentioned spontaneously, although all recognised that cycling had important environmental benefits when probed further.

Barriers to cycling

Traffic and safety

Traffic and safety were once again the main reasons they didn't cycle more frequently.

"When we moved here [from the UK] my boyfriend said don't bother packing your bike because you'd be mad to ride a bike in Sydney"

Awareness of cycling infrastructure

Most felt there was little provision for cyclists on the roads. When shown the visuals of current cycling infrastructure (many of which were near their homes or work), they were surprised that it existed (especially some of the cycling lanes along Park Street).

"You don't notice it's there until you need it I suppose."

Trip end facilities

Most were not concerned about arriving sweaty to their destination.

"You don't have to go full pelt. I imagine if I cycled I wouldn't be going great distances and wouldn't feel the need to wear cycling clothes. I would take it easy."

"In the UK, I used to ride my bike in high heels and a strapless dress"

Of more concerned were bike racks and safe areas to lock up their bikes. There was a perception that there were too few of these in the City and inner suburbs and that some light poles would be difficult to chain their bikes to (especially with a D lock).

Some were aware of the City's 'smart poles' yet didn't realise that the metal ring was for chaining bikes to.



1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

Awareness of cycling routes

A big worry was not being confident about which roads they could cycle on (legally and easily) and which *parts* of the road they could cycle on.

Many felt there were bike friendly back routes to destinations but were not sure where they were or how to find out about them.

“I think I found a map of bike routes on the RTA website a while ago, but it was pretty hard to find and a bit hard to read.”

Most were keen for more accessible resources that could help them work out the best routes, but most were not sure where they would go to find out about them (apart from Google and a couple who mentioned the RTA and City Of Sydney websites).

There was also talk about these routes being well sign-posted on the roads so that cyclists could easily navigate the routes without having to refer to a map too often.

“I tried one once, around the Inner West, and there were a few signs now and then, but it seemed that they assumed you knew where to turn in between some of these signs, when in fact I ended up totally off the track.”

“I worry that you might be riding on relatively quiet back streets, but not sure where you are going and then suddenly you pop out in the middle of Parramatta Road without a clue what to do - stranded.”

“I think in some places there are little blue signs with bikes on them indicating a bike path. More of them would be good.”

One respondent was aware of the cycle lane down Bourke Street, Surry Hills that connected to Moore Park and Centennial Park.

“That’s great. You avoid Cleveland Street and South Dowling Street and you can get from Taylor’s Square all the way to Centennial Park really easily. I really must get around to doing it.”

1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

Planning the trip

Another concern (tied in with knowledge of the best routes) was the organisation required to go cycling. There was feeling that given the perceived lack of infrastructure, the lack of prescribed cycling routes and the lack of adequate bike parking facilities at the destination, that a bike trip (no matter how short) required a certain degree of planning.

“I feel that you can’t just walk out your door and jump on your bike. To me it seems you have to be pretty organised. What’s the best route to go on? Where can I ride? Can I chain my bike up when I get there? That requires a fair bit of work, as opposed to walking or catching public transport, which you know well and you know are easy.”

What would get them cycling?

This group were ‘primed’ to cycle more often. They saw the benefits cycling offered and could see themselves on a bike. Currently, however, this enthusiasm is being tempered by a combination of their own laziness and the perception that cycling is “just too hard” to engage in regularly.

They articulated a need for positive reinforcement that cycling is not as dangerous or as difficult as it looks. They wanted more easily accessible route maps across the city and a stronger physical presence of obvious bike infrastructure.

They were generally proud of the neighbourhood in which they lived and enjoyed the many conveniences inner city living offered. They also engaged strongly with their local community and felt that a strong cycling culture should exist within ‘the City of Villages’. They need to feel they can walk out their door and casually hop on their bike, knowing that their neighbourhood and the City is bike-friendly.

Therefore, for this segment, promoting cycling needs to be a local grass roots movement as much as a broader citywide strategy.



3. Potential cyclists (young females)

Group	Gender	Age	Residence	Cycling behaviour
1 Semi-regular cyclists	Mixed	25-40 years	5km-10km from CBD	Own a bike and cycle at least twice a week. May cycle to work or shopping or for fitness
2 Potential cyclists (Sydney LGA)	Mixed	25-40 years	Within Sydney LGA	May own a bike that they don't ride very often (i.e. less than once a month) or may be interested in getting a bike in the future (to use for riding to work/fitness/around the local area etc.)
3 Potential cyclists (females under 35)	Female	21-35 years	5km or more from CBD	May own a bike that they don't ride very often (i.e. less than once a month) or may be interested in getting a bike in the future (to use for riding to work/fitness/around the local area etc.)

Background

Suburbs lived in: Newtown, Rozelle, Balmain, Cremorne, Mosman.

Employment: Government, student, art dealer, IT, lawyer, Admin.

Lifestyle

Again most of these participants worked 9 to 5, although one worked from home and another was a student who had with a casual job (mostly during the day).

Four participants worked in the City, while the others worked in Darlinghurst, Marrickville and at home.

They seemed to travel around Sydney for leisure and social activities more than the other groups and were also more likely to get out of town for the weekend.

Most participants had a car, and while they rarely used it for work, they did seem to use it more at other times (shopping, socialising, getting away) than the other groups.

1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

Cycling behaviour and history

Many participants had bikes, but rarely used them. A couple used to cycle to work a few years ago, but gave up because it was too dangerous or physically difficult.

“I used to cycle from Balmain into the City, but after a while, it just got too hard riding up that hill into the City after you got across the Pyrmont Bridge.”

Many walked to work (the City) and felt that it was a convenient and safe way to get exercise and get places.

Many also had stories about friends or relatives who had had cycling accidents in Sydney. This only confirmed for them that cycling in Sydney was dangerous.

A few had partners who cycled quite regularly and said being able to cycle with their partners would be a motivator.

“It [cycling] would be good for spending some ‘relationship time’.”

One participant went mountain biking with her partner in the Blue Mountains, although less frequently than she used to.

Cycling benefits

Fitness and fun

Again, fitness was the most important benefit of cycling for these people. Although they were less inclined to embrace the ‘practical fitness’ idea of cycling (i.e. saving time by exercising *and* travelling). Rather, they would prefer to cycle somewhere safe (e.g. a local park or bike path) for this fitness rather than travelling or commuting. The fitness side had to be fun (nice environment, fresh air etc.) rather than feel like hard work (i.e. on major roads).

Social

Some participants felt that cycling was a good opportunity to spend time with their partners who cycled. There was also a sense that cycling could be a social experience (with friends) and not just a solo pursuit.

1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

Alternative to car

'Cycling as an alternative to driving' was a concept not as strongly embraced by this group. Most felt they had a need for a car in their lives (mainly for social outing, holidays and shopping) and while they may be able to reduce some of the car trips they make by cycling more, it was likely to be only a small reduction (cf. Potential cyclists in Sydney LGA who were much more likely to do without a car altogether).

Cost

Cost was mentioned as a benefit but not as much as other benefits. Many felt that public transport costs were quite high and cycling could reduce these, but it was not a prime motivator for cycling more often.

Time saving

A few participants recognised that cycling could half the time it took to get to work, although it was probably not a major benefit compared with some of the downsides involved with cycling (see 'Barriers' below).

"I could maybe save myself maybe 20 minutes on my trip to and from work, which is pretty good, but only takes me about 40 minutes to walk at the moment."

Environment

The environmental benefits of cycling were mentioned a bit more in this group. Most were conscious of environmental issues and felt they were changing some of their behaviour to help (e.g. reducing use of plastic bags). Cycling would be another behavioural change that would be beneficial for the environment. How strong a motivator this would be for this group is debatable, however. There was a sense this group would like to be doing more for the environment, but whether they will actually get around to it is another point. One suspects they are more aspirational ('I would like to do it'), rather than practical ('I will do it'), in their commitment to 'green' issues.



1	Semi-regular cyclists
2	Potential cyclists (Sydney LGA)
3	Potential cyclists (females under 35)

Barriers to cycling

Traffic and safety

Traffic and safety were once again the main reasons this group didn't cycle further afield from their own patch and potentially more frequently. Of all the groups, this group was most concerned about their personal safety while cycling in Sydney.

Confidence /self-conscious

Many felt they were not confident cycling on roads. This came from a concern they were not physically fit enough to tackle some roads, as well as feeling they lacked the experience to safely and confidently ride in traffic and with other cyclists.

A couple of participants were also self-conscious about looking unconfident or unfit when cycling on the roads.

Hills

This group was the only group to mention that the hills in Sydney were a major barrier to cycling more.

Inconvenience

As with the other Potential cyclist group, this group also felt that cycling required a fair bit of preparation (e.g. putting on helmet, locking the bike up etc.) and therefore inconvenience to make it an easy and casual part of their lives.

"If I were going up the road to get a DVD or something, I'd have to go down to the garage in our apartment, unlock it, get the bike out, open the garage door....I might as well just walk."

Visible presence of cycling infrastructure

Most did not feel there were many bike lanes or infrastructure where they lived nor in and around the City.

Sweatiness/bike clothes/helmet

This was more of an issue for this group. Some had trip end facilities at their work, but more of a problem was the inconvenience of carrying extra clothes to work and showering and changing at work. A couple of



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participants said they “felt funny” having a shower at work. They also mentioned that the changing and showering also added extra time to their journey.

Awareness of cycling routes

They were not aware of any cycling routes in Sydney.

Some suggested a better web presence to improve this (e.g. ‘www.cycle.com.au’ to look up routes, how easy they are etc.).

What would get them cycling?

This group were also ‘primed’ to cycle more often (but perhaps not as much as the other Potential cyclist group). In comparison, it seemed they were quicker to find more barriers to cycling than their Sydney LGA equivalents. They did not see themselves cycling for many different reasons (e.g. commuting, travelling in their local area etc.). Rather, cycling was primarily seen as a fitness and recreational pursuit and one that should be easy and safe to engage in (i.e. away from traffic).

With that said, there still exists opportunities amongst this group to increase cycling frequency.

As with the other group, there is a need for positive reinforcement that cycling is not as dangerous or as difficult as it looks. This message is probably best framed within a ‘female context’ (i.e. it’s OK for women to cycle) and should emphasise that it doesn’t take much to be more confident riding a bike.

They too wanted more easily accessible route maps across the city and a stronger physical presence of obvious bike infrastructure. However, it is likely that recreation, fitness and fun will be the main motivators for any increase in their cycling frequency is. Therefore, local parks and bike tracks probably hold the most appeal.

It should be noted that there is still a significant potential commuter group amongst this segment and they should be actively pursued. However, in terms of the group most susceptible to behavioural change, the recreational group seem to hold the most initial promise (with a potential flow-on effect to the commuter group).



Reactions to infrastructure visuals

The tables over the page summarise the responses to the infrastructure visuals shown during the groups. Generally, participants across the groups responded in a similar way to the visuals (and differences in response by a particular group will be noted).

On the whole, most participants (including the more frequent cyclists) were unfamiliar with the infrastructure visuals shown.





Shoulder lanes

Some had experience with these as both cyclists and drivers. While most were concerned about opening car doors, they realised they were better than nothing.

Obviously, the shot without the parked cars was seen as a preferable (with some wondering, hopefully, whether it was a cycle-only double lane).



Contraflows

These were generally well liked by most participants. They looked pretty safe to most, especially the lane behind the parked cars.

There was some concern that that they might be too narrow. Similarly there was some discussion as to whether driving against the traffic flow was a better solution. Most agreed that seeing the traffic coming towards you (rather than worrying about it over you shoulder) was preferable.

However, the main perceived benefit of the contraflows was the green lane marking as much as the infrastructure itself. Most felt that prominent colouring of bike lanes would help improve the awareness of bike lane amenity and promote more cycling.





Shared paths

These were the most preferred types of cycling infrastructure, especially the ones that were as far from away from car traffic as possible.

Narrow shared paths with pedestrian traffic and confusing signage (directly left) were the most criticised.

The Anzac Parade lane was seen as a positive move to allow cyclists to travel along main thoroughfares safely.



The Prince Alfred Park lane was especially favoured by those wanting to cycle safely for recreation and fitness (i.e. Potential cyclists, females under 35)





City lanes (shoulder and kerbside)

Most participants were surprised that these lanes existed in the City.

The kerbside lane was the most preferred so cyclists wouldn't have to worry about both sides of them (parked cars on one, traffic on the other). The shoulder lane was more daunting for most participants.

Many questioned whether these city bike lanes were continuous or whether they stopped at certain intersections (thereby potentially leaving the cyclist stranded or forced back in the traffic).



Bus lanes

Not everyone was sure whether cyclists were allowed by law to ride in bus lanes although most had seen other cyclists doing it. There was a general fear of bus drivers, therefore many would not think about cycling in bus lanes. Some even said they would even prefer to ride in traffic than in a bus lane.

Appendix



Discussion guide

All groups

Intro

Purpose of discussion, confidentiality, tape

Occupation, where work, where live, household set-up of each participant

Current lifestyle

- Working hours, study, family responsibilities etc – days, hours. Sharing load with other household members
- Shopping patterns – where, how often
- Social and leisure life – what you do, with who, where etc.
- Transport use (car, PT, walking etc.).What do you use for the above? Explore different days, times, modes for different types of activity.
- Has their transport use changed over time? Driving more, walking more, PT more?
- Explore attitudes to public transport – reliability, frequency, safety etc.
- Are they similar to their peer group in the above? Discuss differences.



Individual groups

Semi-regular cyclists

- Current cycling behaviour - where and for what reasons and how often, with others or alone
- How did they get into cycling?
- What do they see as the main benefits of cycling?
 - What they like about it e.g. physical fitness, low cost, speed,
- What they don't like about it e.g. gaps in cycle routes, drivers' attitudes etc.
 - What they would do to change the things they don't like, or what they would do generally to make things (even) better for cyclists
- Do they currently have access to 'Trip End' facilities? – parking, lockers, showers, change rooms etc.
- How safe they feel when cycling on the road. Probe on:
 - Others' attitudes to cyclists on the road e.g. bus drivers, motorists, taxis, delivery drivers and couriers (car, motorcyclist and other cyclist);
 - Do they themselves obey the road rules (e.g. do they give way to pedestrians on shared paths? Do they cycle through red lights e.g. at pedestrian crossings? Do they cut through lines of traffic to get to the front?)
- What would make them cycle more often, or for more everyday and less purely fitness related activity (like travelling to the shops, to leisure activities, to work). Probe on infrastructure, education, communication campaigns etc.

Visuals for discussion

Use in above discussion where appropriate when discussing infrastructure etc. Gauge preferences and discuss.

Potential cyclists (Sydney LGA & young females)

- Discuss their cycling history. Did they ever cycle more regularly? When? Why/ What for? Why did they give it up?
- If any currently cycle what kind of cycling they undertake and with whom (e.g. families, fellow sports cyclists etc. but infrequently)
- What they see as the main benefits of cycling (fitness/environment)
- Why don't they currently cycle more often? Probe on the following (use visuals where appropriate)
 - Comfort and confidence riding on the road
 - Comfort levels with different types of trips e.g. local, to education, for shopping, to entertainment, for recreation – for recreation, understand how they travel to the point they cycle (e.g. do they travel with the kids and the bikes by car to the park?)
 - Knowledge of the road rules, how to stay safe and knowledge of bike maintenance
 - Trip End facilities
 - Current work/study hours (late nights, early mornings etc.)
 - Looking and feeling sweaty. Cycling clothes etc.
- What would make them cycle more often? (Follow-on from some of the answers above and expand, use visuals where appropriate).
- Discuss the fitness, convenience, and environmental issues again. What is the key driver(s) for them? Can they see the benefits in combining these drivers (e.g. a good way to keep fit and keep a car off the road)? What would be needed to convince them of these benefits?

Visuals for discussion

Use in above discussion where appropriate when discussing infrastructure etc. Gauge preferences and discuss.

All groups

Media and information

Describe your media consumption: which TV channels (pay and free to air), which newspapers, local what local, magazines, radio, internet etc.

Which sources are the most influential on your decisions making (for local events and initiatives, for shopping, entertainment etc.)

Where would they look for information on cycling? Where have they looked?

How happy are they with the amount and quality of information available on cycling (if they have looked).

