



TAVERNER RESEARCH

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TAVERNER
RESEARCH

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INTRODUCTION





Introduction

The *City of Sydney Cycle Strategy and Action Plan 2007-2017* is Council's commitment to making cycling as attractive a choice of transport as walking or using public transport.

The strategy outlines the infrastructure needed to ensure a safer and more comfortable cycling environment and the social initiatives that will encourage more people to cycle.

It is based on comprehensive analysis of cycling issues prepared by consultants for the City with significant input sought from the community during its preparation.

Cycling Strategy Aims

The City aims to make cycling an equal transport choice for residents, workers and visitors by 2017.

Specific aims of the strategy are:

- creating and maintaining a comfortable and bicycle friendly environment in Sydney to encourage more residents, visitors and workers onto bicycles;
- improving cycling safety
- promoting the benefits of cycling; and
- increasing the number of trips made by bicycle in Sydney.

Cycling Research

An on-line benchmarking survey was conducted in 2006 to inform the City of Sydney's ten year cycle strategy. This 2009 survey seeks to see if the views, behaviour and actions relation to cycling has changed from what was captured in 2006.

Methodology

The survey was conducted online amongst 1,224 Sydney residents, aged 18 to 50 years, living within a 10km radius of the Sydney CBD.

Respondents were randomly selected from a large database, emailed a survey link and asked to complete the questionnaire. The questionnaire took approximately 10 minutes to complete.

The questionnaire was essentially the same as the 2006 questionnaire asking about respondents current cycling behaviour, attitudes, barriers, potential triggers for increased cycling, media consumption and demographics (see Appendix for copy of questionnaire).

The survey was conducted from 28 October to 3 November 2009.

Sample

The sample consisted of 18 to 50 year olds living within 10 klm radius of the Sydney CBD. In 2009 the final sample was weighted, using 2006 Census Data for Inner Sydney and the Eastern Suburbs Statistical Division to more accurately represent the age and gender of the population. Sample demographics and weighting sample for the 2009 survey are shown below:

	Sample #	Sample %	Weighted #	Weighted %
GENDER				
Male	498	41	612	51
Female	726	59	588	49
AGE				
18 to 24	248	20	237	20
25 to 34	412	34	463	39
35 to 44	348	28	343	29
45 to 50	208	17	157	13
SEGMENT				
Sydney LGA residents	277	23	295	25
Others in 10klm radius	947	77	905	75
Students	245	20	252	21
CBD workers	574	47	581	48
TOTAL	1224	1000	1200	100

BICYCLING PROFILE





Cycling Behaviour

Respondents were asked about their cycling behaviour and classified according to the statements below:

- I don't own a bike and am not interested in bicycle riding - Non-cyclist
- I own a bike, but I use it less than once a month - Infrequent cyclist
- I am interested in bicycle riding but do not own a bike – Potential cyclist
- I own a bike and use it at least once a month - Cyclist

The table below shows the proportion Sydney-siders in each segment.

	2006 #	2006 %	2009* #	2009* %
Non-cyclist	286	25	249	21
Infrequent cyclist	180	16	247	21
Potential cyclist	437	38	495	41
Cyclist	247	21	209	16
Total	1,150	100	1,200	100

* 2009 sample weight by gender and age

Q: Which of the following statements best describes you?



Cyclist Demographics

- Cyclist are more likely to be males (22% compared to 13% of females) and in the 34 to 44 year age group (23 compared to 15-18% of other age groups).
- There appear to be a shift among younger cyclist to riding less frequently with 15% of 18 to 34 year olds riding at least once a month in 2009 compared to about 21% in 2006. Conversely in 2009 21% of 18 to 34 year olds said they owned a bicycle but ride less than once a month compared with 15% in 2006.

	Non-cyclist		Infrequent cyclist		Potential cyclist		Cyclist	
	2006 %	2009 %	2006 %	2009 %	2006 %	2009 %	2006 %	2009 %
GENDER								
Males	13	17	13	22	34	40	40	22
Female	31	25	17	20	40	42	13	13
AGE								
18 to 24	21	16	15	22	43	47	20	15
25 to 34	23	16	15	21	40	48	22	15
34 to 44	23	25	18	20	36	33	23	23
45 to 50	43	32	12	20	28	30	16	18

Q: Which of the following statements best describes you?



Cyclist residence and work

	Non-cyclist		Infrequent cyclist		Potential cyclist		Cyclist	
	2006 %	2009 %	2006 %	2009 %	2006 %	2009 %	2006 %	2009 %
RESIDENCE								
Sydney LGA	20	15	14	18	45	49	21	18
Other 10klm	27	23	16	21	35	39	22	17
PLACE OF WORK								
Sydney CBD	26	17	15	23	35	43	24	17
Outside CBD	22	22	16	20	41	40	21	18
Do not work	--	30	--	14	--	40	--	16
EDUCATION								
Student	--	11	--	23	--	45	--	21
Non-student	--	23	--	20	--	40	--	16

-- 2006 figures unknown

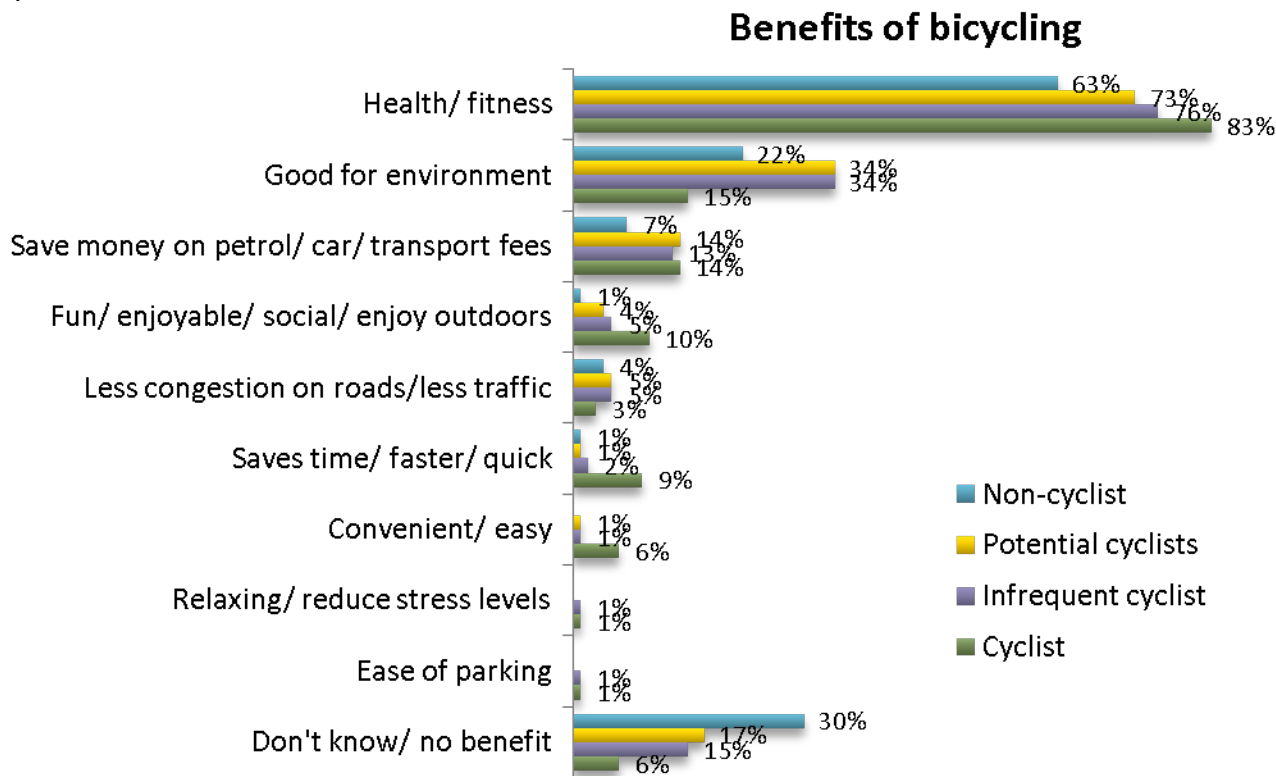
Q: Which of the following statements best describes you?





Benefits of bicycling

- Health and fitness was mentioned as the main benefits of bicycling by 73% of all respondents and was the most frequently mentioned benefit by all segments. Females (76%) and older respondents (77% of 35-50 year olds) were more likely to mention health and fitness than were males (70%) and younger respondents (70% of 18-34 year olds).
- Cyclist were more likely to mention that bicycling is fun and enjoyable, faster and convenient than were non-regular cyclist.



Q: What do you feel are the main benefits of bicycle riding on a regular basis?

Bike Riders

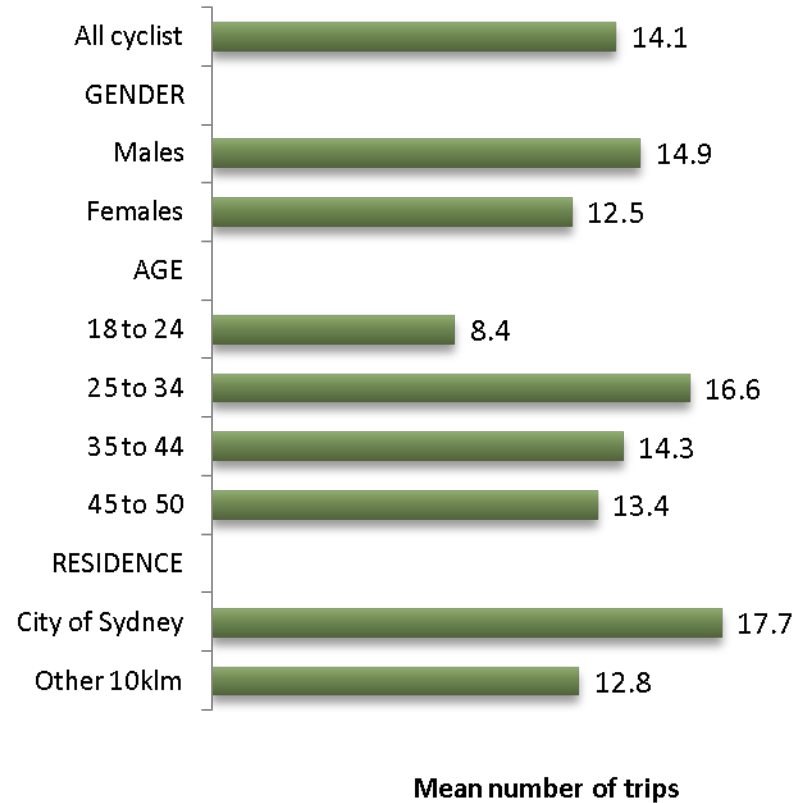




Average monthly trips

- Regular bike riders reported taking an average of 14.1 trips a month or 3.5 per week. The chart on the right shows that males averaged slightly more trips per month than females and cyclist age 25 to 34 and cyclist living in the City of Sydney averaged 5 more trips a month than those living in other LGAs.
- The cyclist who averaged the most trips per month (22.6) were those that live in the City of Sydney and work in the Sydney CBD with 28% making over 20 trips per month.
- Two in five cyclists (40%) average five or less bicycle trips per month and 19% average more than 20 trips per month.

Average number of monthly bicycle trips



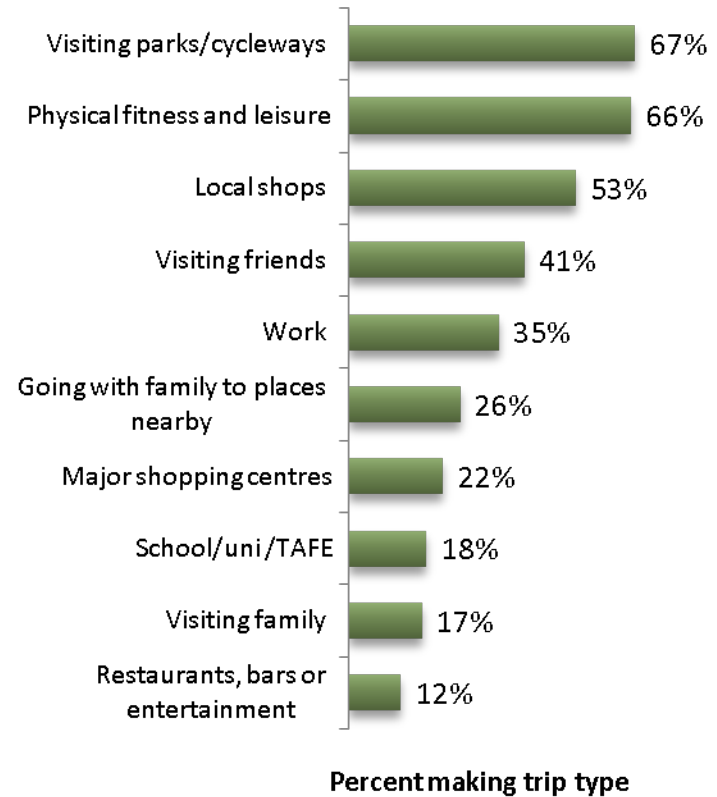
Q: One average, how many trips would make on your bicycle in a month?



Types of bicycle trips

- Two in three bike riders ride to visit parks or cycleways (67%) and for physical fitness and leisure (66%).

Type of trips bicyclist take

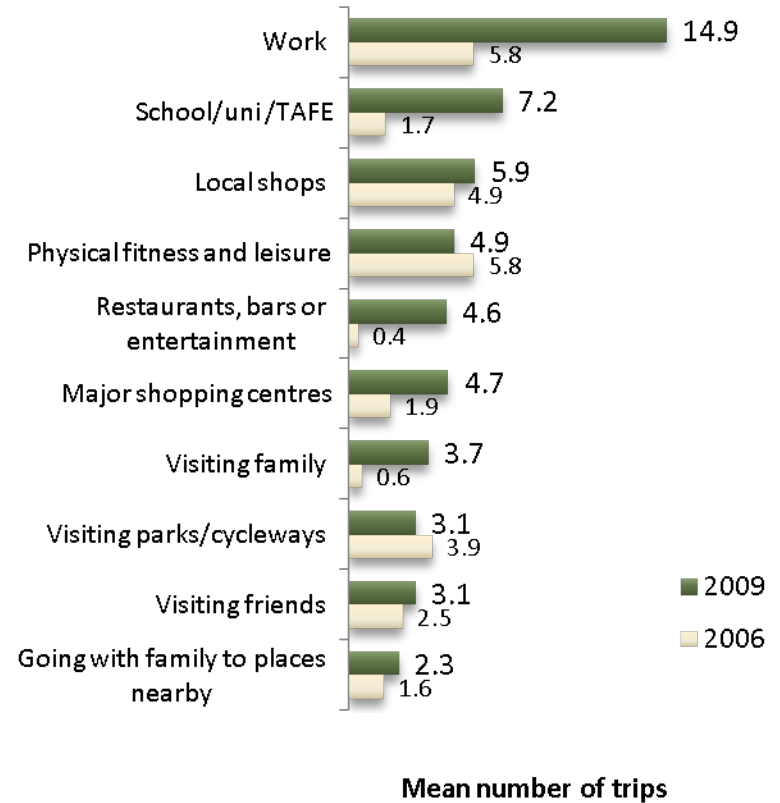


Q: For which of the following do you ride a bicycle for all or part of the trip?

Types of bicycle trips

- While 35% of cyclist bicycle to work, those that do average 15 trips per month with 25% averaging more than 20 trips per month.

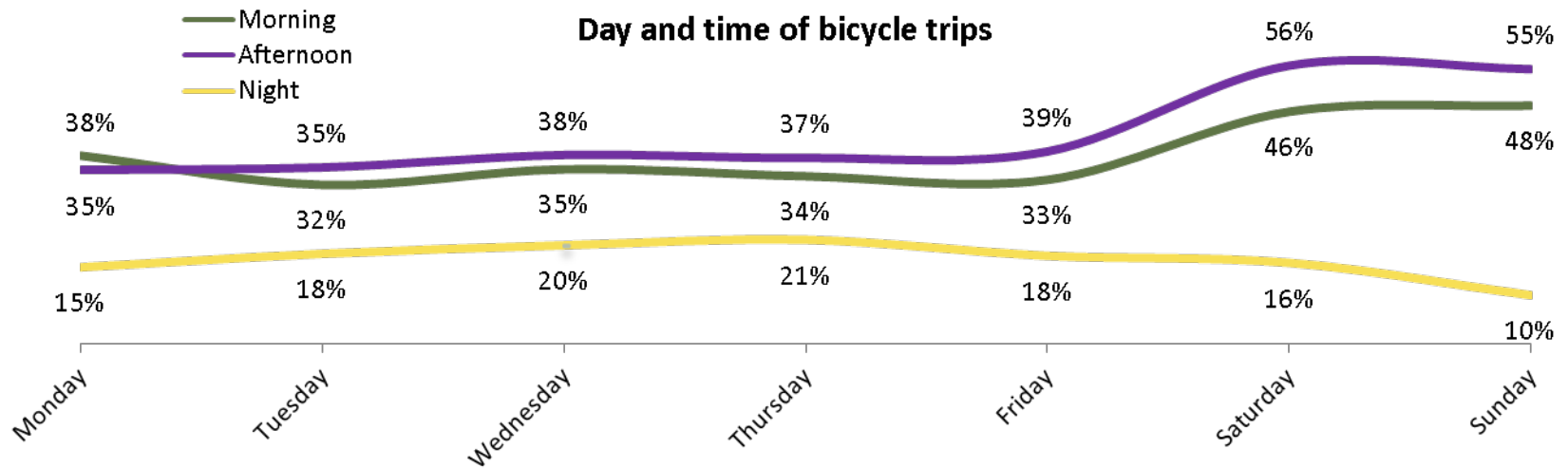
Monthly bicycle trips by reason



Q: Please indicate approximately how many bike trips you make for each per month?

Types of bicycle trips

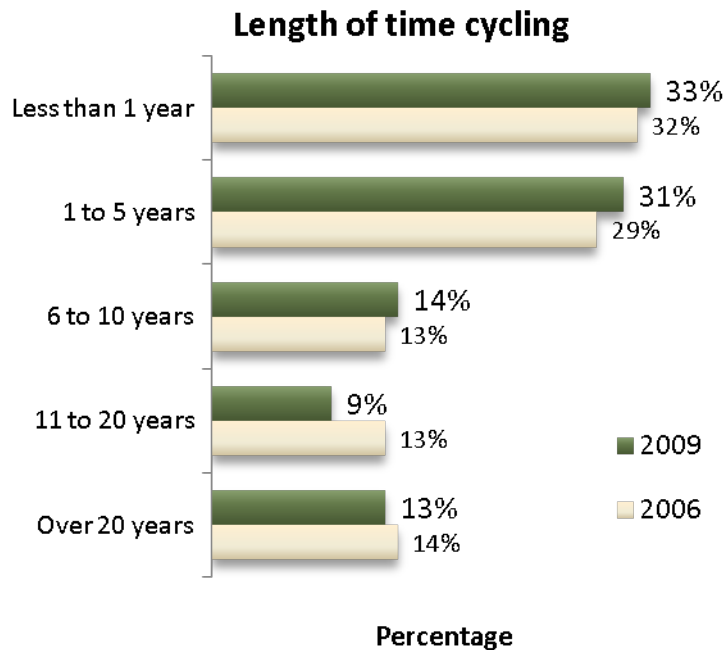
- Consistent with the large proportion of bicycle trips being made to visit parks and cycleways and for fitness and leisure the majority of bike riders report typically cycling on weekends, with over half cycling on weekend afternoons.
- The 2009 days and times of bicycle trips were generally consistent with those reported in 2006.



Q: Using the grid below, please indicate which days of the week, and times of the day you typically cycle.

Length of time cycling

- Two in three cyclist (64%) have started to regularly ride a bicycle within the last 5 years, consistent with 2006 results.
- 25 to 34 year olds were most likely to have taken up bicycling in the last 6 months (28%).



Membership of bicycle clubs or groups

- Slightly fewer bike riders belonged to a bicycling club or groups in 2009 (5%) than in 2006 (8%). The University Bicycle Club was the only club mentioned twice with each of the following receiving one mention:
 - Ashbug
 - Bird
 - Bicycle NSW
 - Botany
 - BRATS
 - Critical Mass
 - Cycle Recycle
 - Randwick
 - RSL
 - Village Bikes.

Q: How long have you been bicycle riding regularly?
 Q: Are you a member of any bicycle riding clubs or groups?

Knowledge of bicycle maintenance

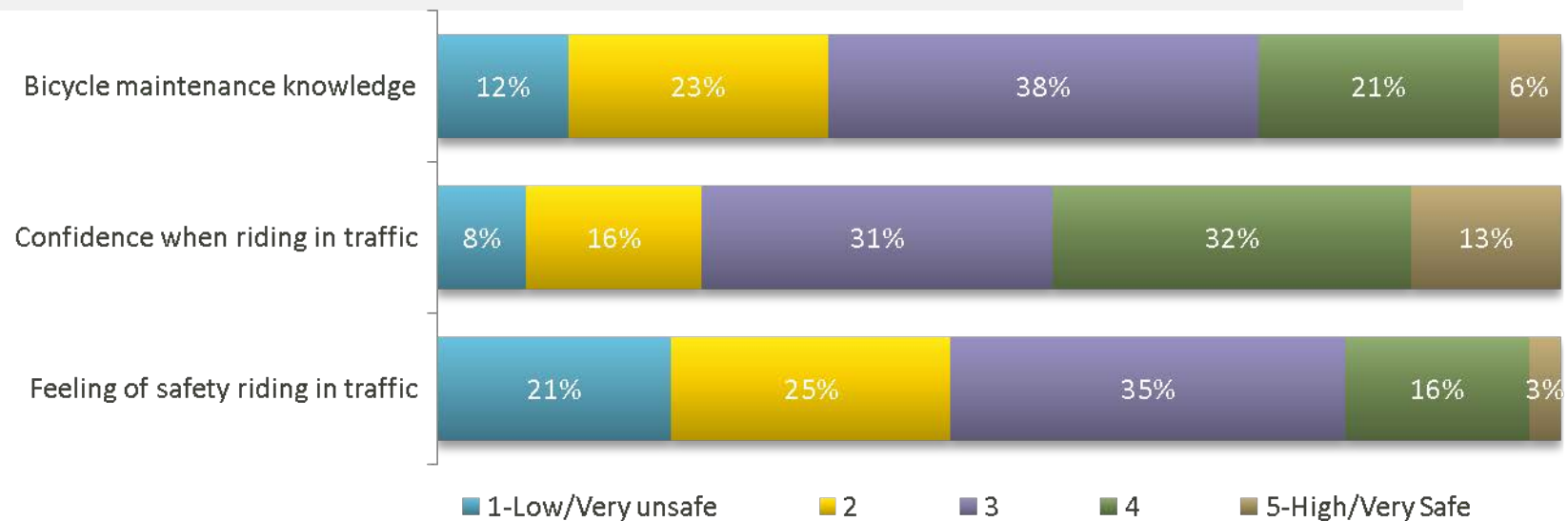
- Overall one in three (35%) of bike riders rate their knowledge of bicycle maintenance as low and one in four (27%) rate it as high. Males (38%) are more likely to rate their knowledge as high than are females (7%).

Confidence in traffic

- Bike riders generally feel confident riding in traffic with 76% rating their level of confidence as high or medium.

Safety in traffic

- Only 19% of bike riders said they feel safe riding in traffic and nearly half (46%) feel unsafe.



Q: On a scale of one to five, with one being low/very unsafe and five being high/very safe, how would you rate:

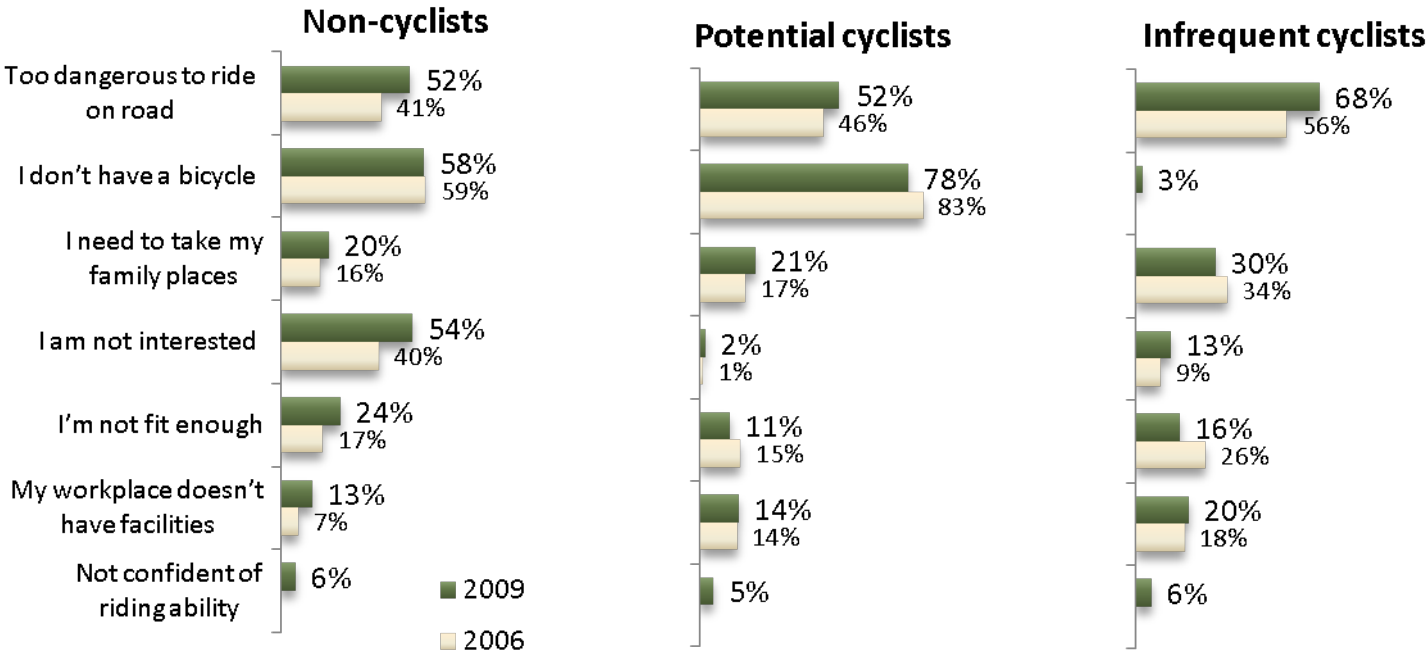
- your level of knowledge about bicycle maintenance?
- our level of confidence when riding your bike in traffic?
- how safe you feel when riding your bike in traffic?

IRREGULAR Bike Rider



Reasons for not bicycling regularly

- The danger on bicycle riding on the road was the most frequently mentioned reason for not riding on a regular basis (56% over all non-regular bike riders groups).
- Over half (54%) on non-cyclists said they were not interested in bicycling and one in four (24%) said they were not fit enough to bicycle indicating the there is little chance of converting a large segment of this groups to cyclist.
- Infrequent cyclist were more likely than other groups to say it is dangerous to ride on the road and that they need to take family places and they can't do that on a bike.

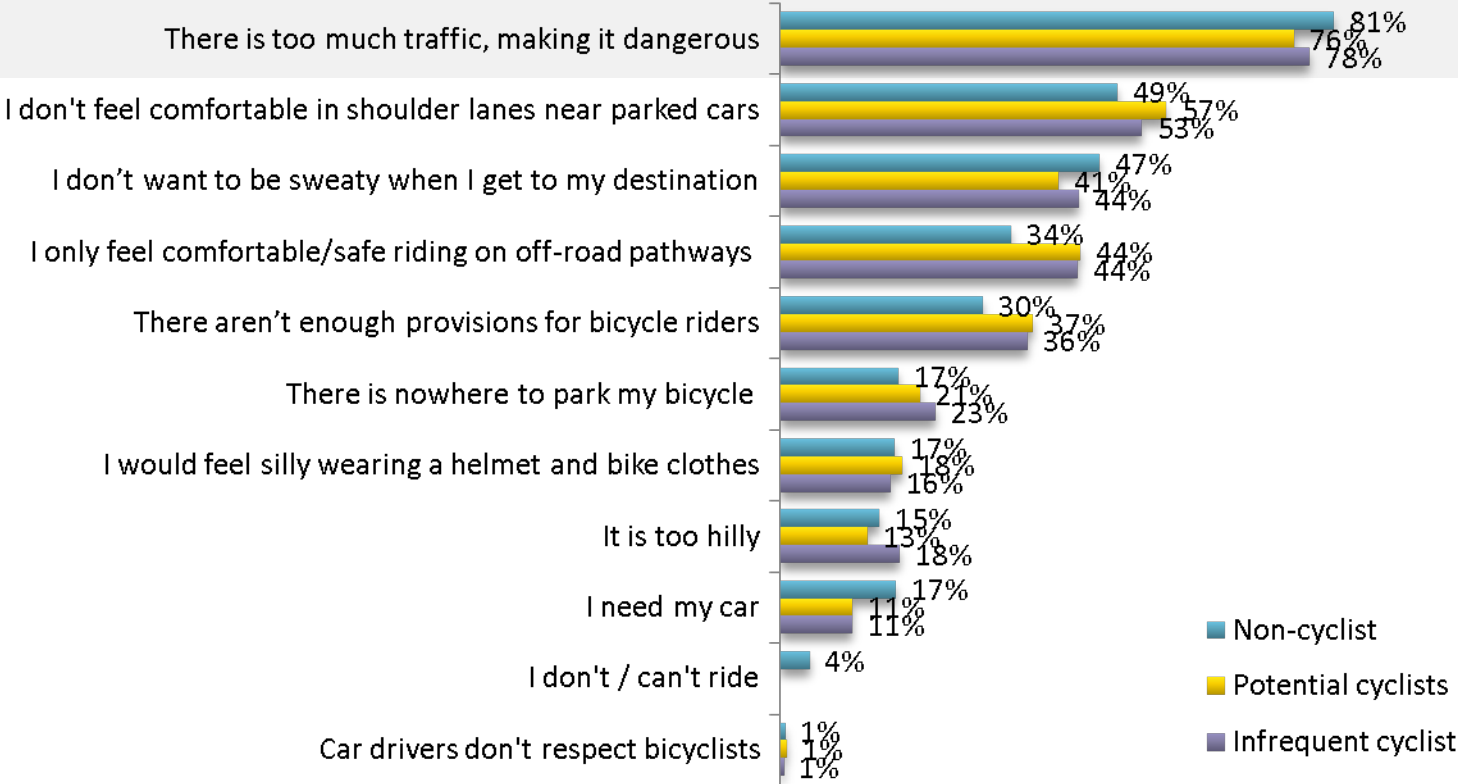


Q: Thinking about reasons why you do not cycle, which is the following would you give for not bicycle riding on a regular basis?

Reasons for not bicycling in the CBD

- Bicycling in the CBD is considered even more dangerous than bicycling in traffic with 77% of all non-regular bike riders saying they don't ride in the CBD because of the traffic and 54% saying they are not comfortable in shoulder lanes near parked cars.

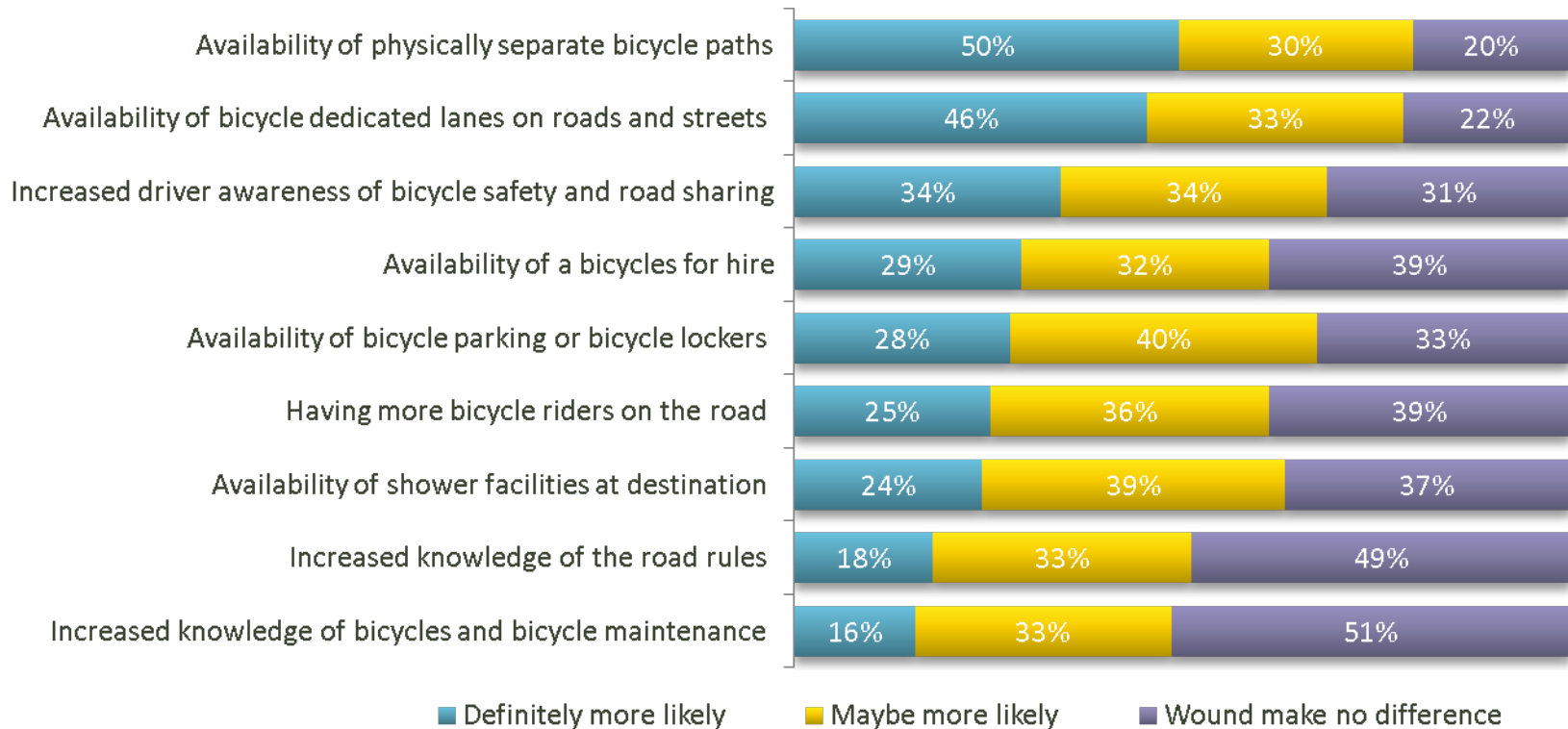
Reason for not bicycling in the CBD



Q: Thinking about reasons why you do not or would not cycle in the City (the CBD and surrounding areas), which of the following would you give?

Measures to encourage bicycling

- Consistent with the danger of bicycling on the road and traffic being the main reason non-regular bike riders don't cycle more, the availability of separate bicycle paths and dedicated bicycle lanes are the main measures that would encourage more to bicycle.
- Few measures would convert non-cyclist into cyclists, however 17% of non-cyclists would definitely be more likely to cycle if there were physically separated bicycle paths or dedicated bicycle lanes.

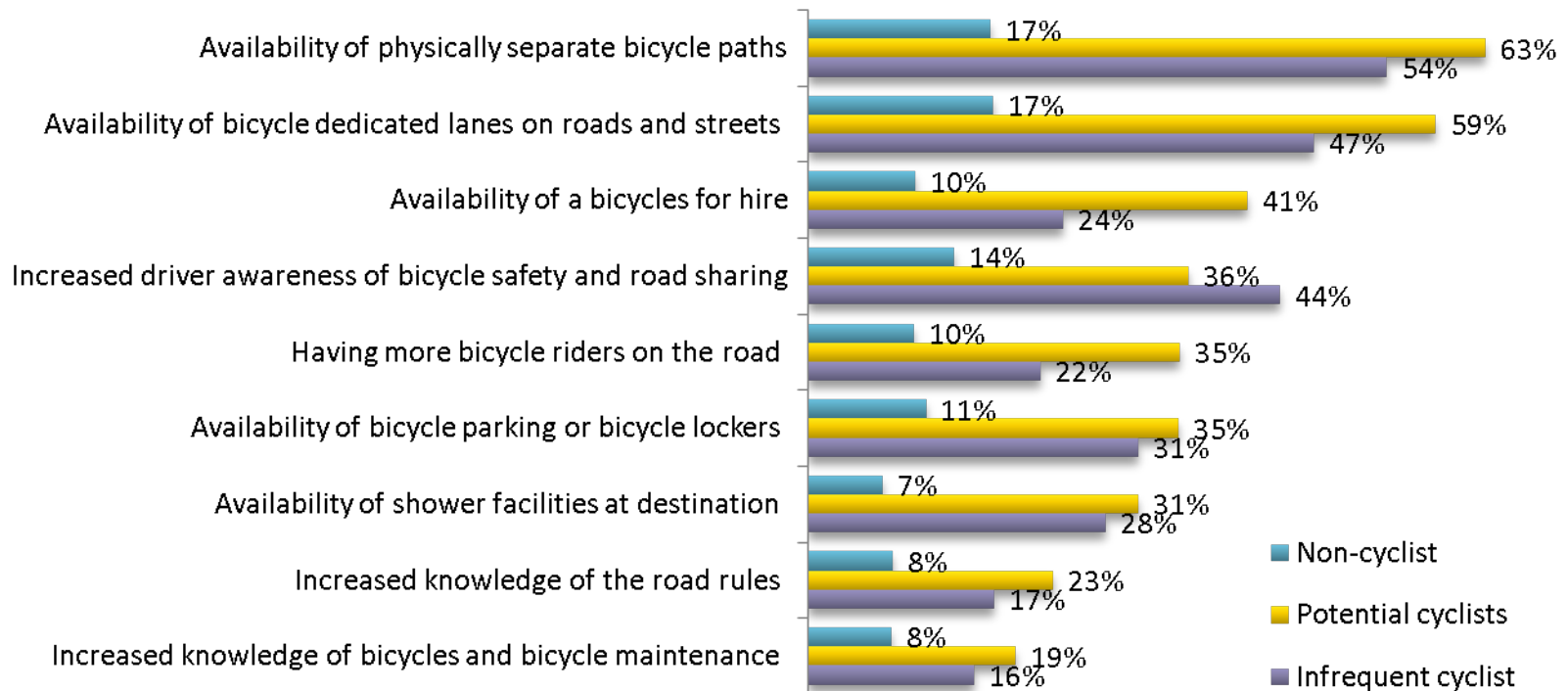


Q: Please indicate whether the following would make you more likely to cycle on a regular basis?

Measures to encourage bicycling

- Few measure would convert large numbers of non-cyclist into cyclists, however 17% of non-cyclists would definitely be more likely to cycle if there were physically separated bicycle paths or dedicated bicycle lanes.
- Potential cyclists appear to be the most likely to change their behaviour with more than half saying they would definitely cycle regularly if there were separate bicycle paths (63%) or dedicated bicycle lanes (59%).

Definitely would cycle more regularly if:



Q: Please indicate whether the following would make you more likely to cycle on a regular basis?

Trips measures would encourage (percentage*)

	Visiting parks/ cycleway	Physical fitness/leisure	Local shops	Work	Visiting friends	School/uni/ TAFE	Major shopping centres	Taking family to nearby places	Visiting family	Restaurants bars entertainment
Increased knowledge of bicycles and maintenance	61	54	52	45	33	28	26	16	13	7
Increased knowledge of the road rules	53	44	46	46	29	26	29	17	15	8
Availability of bicycle parking or bicycle lockers	43	40	48	51	23	23	34	15	9	13
Availability of shower facilities at destination	19	25	15	69	12	22	14	9	7	9
Increased driver awareness of bicycle safety and road sharing	50	47	47	57	32	26	39	23	20	14
Availability of bicycle dedicated lanes on roads and streets	50	47	47	59	32	25	37	23	20	14
Having more bicycle riders on the road	42	44	39	53	29	25	34	20	17	15
Availability of physically separate bicycle paths	50	50	45	58	33	25	38	23	20	16
Availability of bicycles for hire	39	38	31	45	23	23	35	20	12	19

* Percentage of non-regular bike riders who would definitely cycle more regularly if measure was implemented.

Q: You said you would cycle more if [...] . Which of the following trips would you be more likely to use a bicycle for?



MEDIA

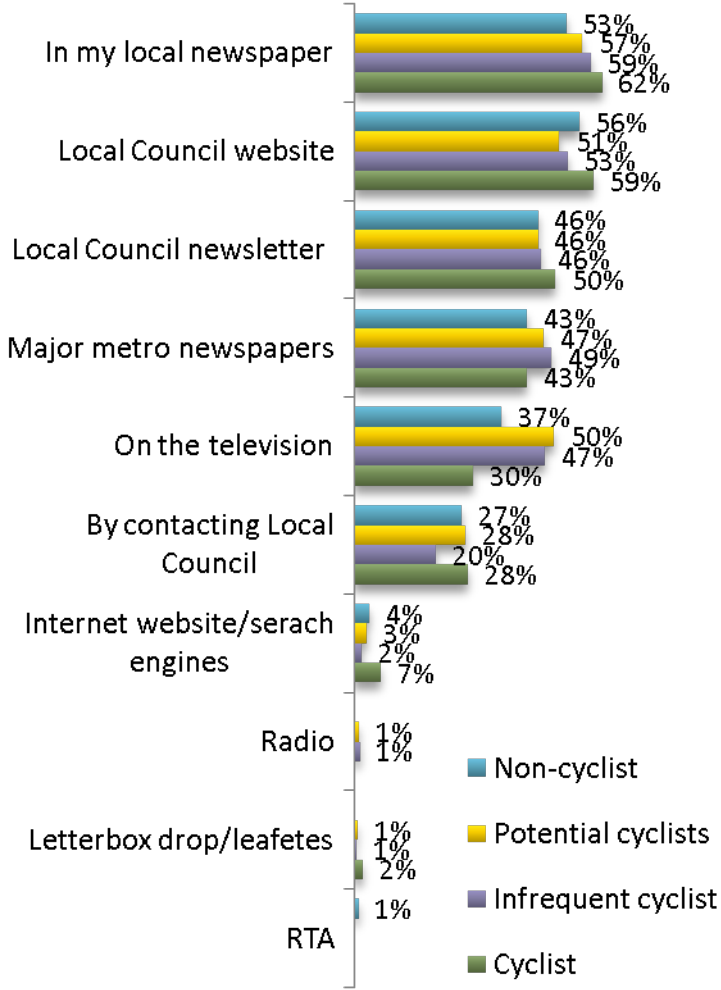


Expected media sources

Expected information sources

- All cyclist segments look to local sources for information on bicycle riding programs and initiatives. Along with local newspapers the local council is regarded as a primary source of information with about half of respondents nominating Council websites (54%) and Council newsletters (47%).

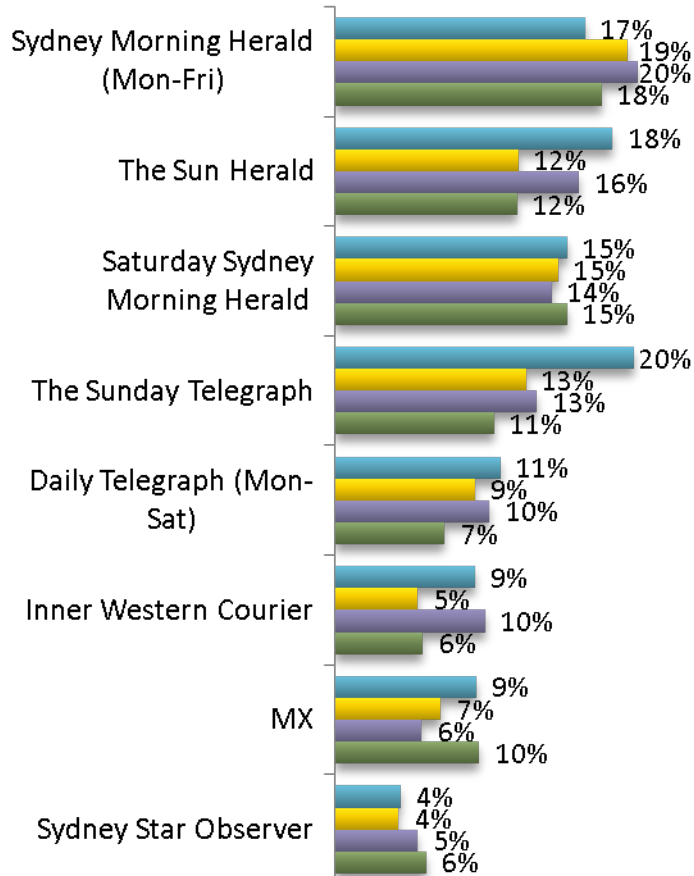
Expected media sources



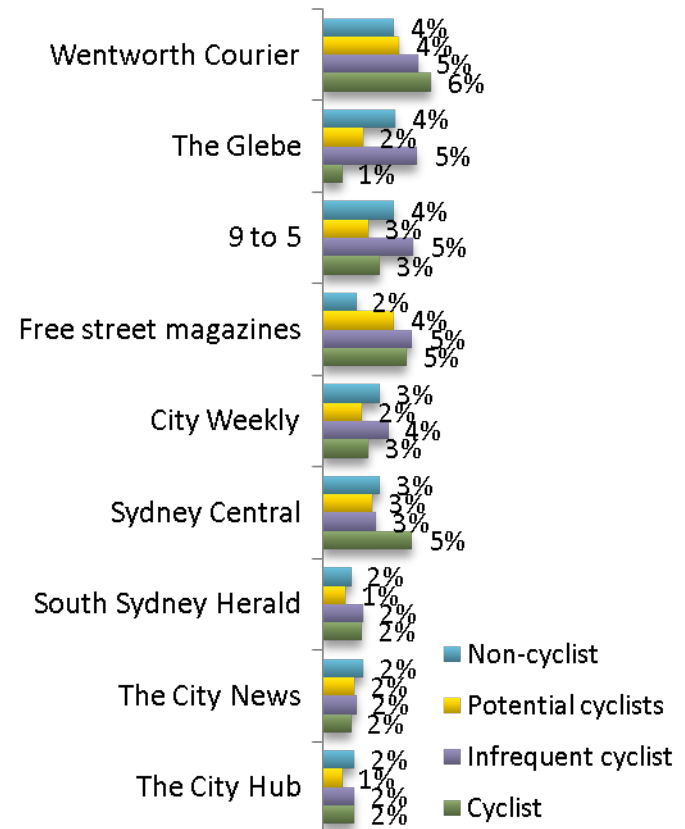
Q: Where would you expect to find information about programs and initiatives of local, state and federal government with regard to bicycle riding?

Newspaper readership

Read every or nearly ever issue



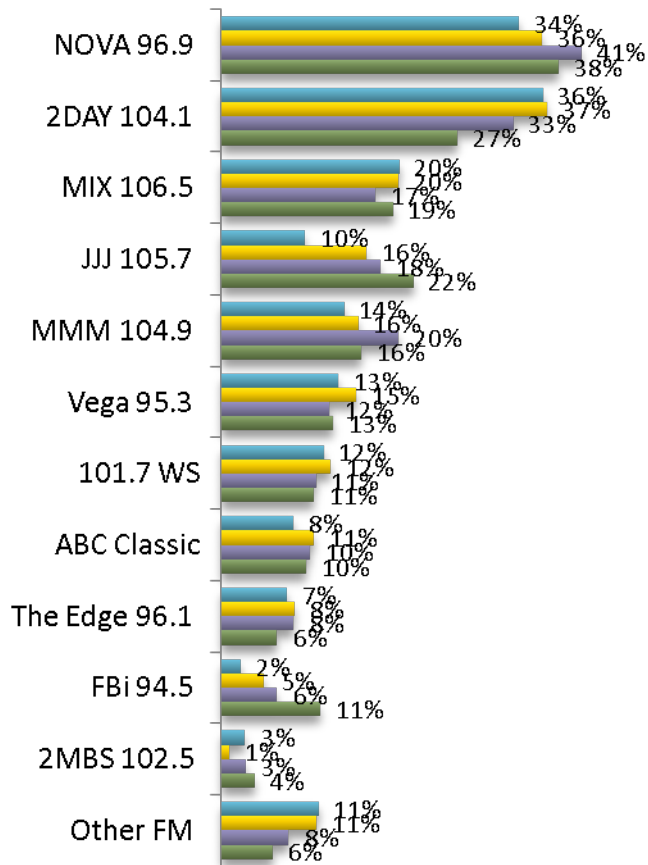
Read every or nearly ever issue



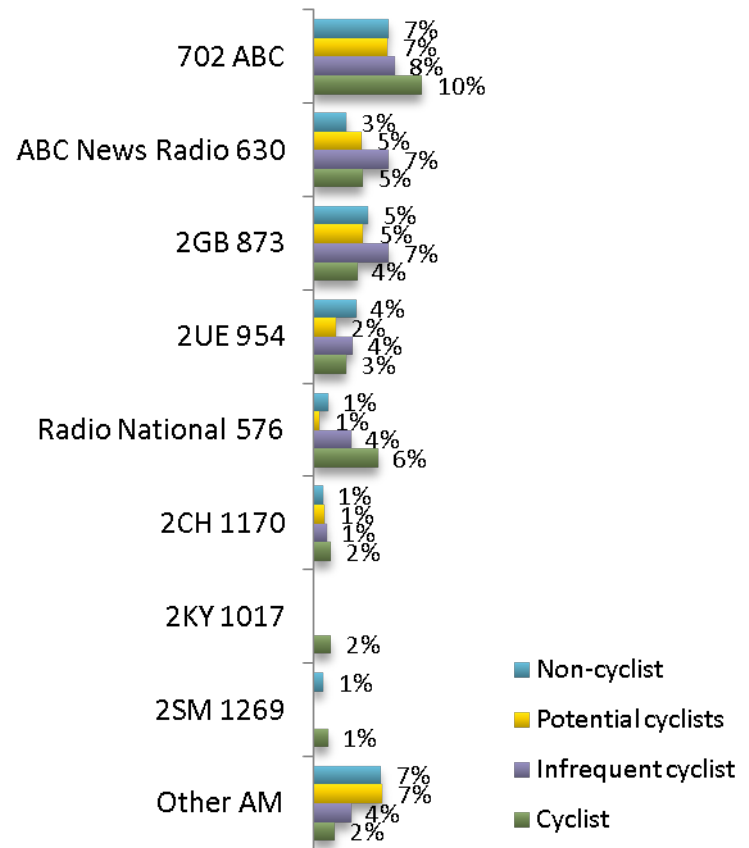
Q: Please indicate how often you read the following newspapers and magazines?

Radio Listening

Most listened to FM radio



Most listened to AM radio



Q: Which radio stations do you listen to the most?



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