



# More bicycle riding, more often in Queensland

Research summary report 2018



Queensland  
Government

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## Executive summary

Bike riding represents a key activity for Queensland, delivering a range of economic, environmental, social and health benefits for individuals and the state. The Department of Transport and Main Roads developed the *Queensland Cycling Strategy 2017–2027* and accompanying *Queensland Cycling Action Plan 2017–2019* with a vision for more bike riding, more often in Queensland.

To support this growth agenda, external marketing and research companies were engaged to review secondary sources, run stakeholder engagement and conduct primary research amongst residents to better understand the attitudes, behaviours, barriers and enablers that affect bike riding in Queensland.

The key insights have informed the development of a segmentation model for Queensland, with typologies based on bike riding usage behaviour with an attitudinal overlay. Furthermore, the research has inspired the creation of a range of possible bike riding encouragement work packages, with ideas to be further scoped and prioritised.

The research identified that although most Queenslanders have fond childhood memories of bike riding, it's perceived amongst some adults as a fringe activity that suffers from the stigma associated with lycra-clad cyclists and the ongoing hostility between motorists and cyclists. This fuels safety fears (i.e. both physical and verbal) and erodes personal confidence which further inhibits trial and retrial.

The negative aura and entrenched apathy in combination with a lack of access to dedicated infrastructure acts as a deterrent to bike riding in Queensland. This is further exacerbated by other emotional (e.g. risk of embarrassment) and practical (e.g. access to a bike) hurdles. In such a car dominated state, there's a heavy reliance on vehicles for even the shortest journeys.

As anticipated, better access to safe, connected, practical and well-signed cycling infrastructure (off-road and on-road) ranks as the number one enabler of more bike riding, more often. Beyond this, driving trial or retrial amongst mostly lapsed riders can be achieved by further legitimising and normalising bike riding and shifting the focus from the niche hardcore to everyday Queenslanders.

This encompasses both bike riding culture (i.e. social norms) and individual behaviour (i.e. personal habits). In fact, there's more than one way to achieve behaviour change. The research identified bike riding as a natural progression which requires knowledge and skills. There's a feedback loop where confidence leads to trial then experience builds confidence to keep riding. This can all start with a positive recreational riding experience.

To build confidence, it's important to focus on the interconnected forces which help to reduce obstacles and increase access. Examples including shifting the language from cycling/cyclists to bike riding/bike riders, improving knowledge of rules, promoting a sense of harmony, creating positive trial experiences, introducing financial incentives and capitalising on the e-bike opportunity.



## Executive summary continued

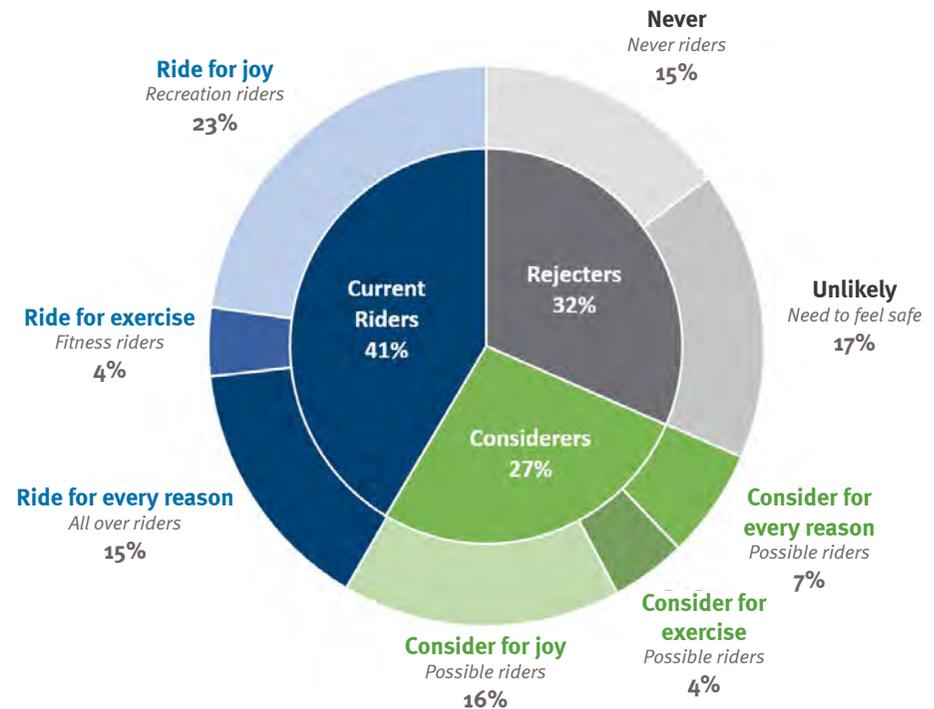
Also identified were a series of existing motivators that should be leveraged, such as the nostalgia of bike riding, existing cycling infrastructure, influence of family and friends and making the most of Queensland.

The focus should be on the more immediate personal benefits such as enjoyment, adventure, time out, socialising and positive mental health. These were shown to be more motivating than the delayed benefits such as physical health, cost savings and environmental aspects.



Finally, it was determined that people cannot be viewed as one homogenous bike riding group. As such, a segmented and targeted approach must be taken to bike riding encouragement. In particular, the emphasis should be on those Queensland typologies with the highest propensity to ride again and more. The analysis highlighted existing and possible recreation riders as important segments.

### Bike riding behaviour in Queensland



*Current riders (for joy) and considerers (for joy and for every reason) have the highest propensity for more bike riding, more often.*



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## 1.0 Key takeouts

**Secondary research:** literature review of 53 cycling research papers, evaluation of two successful cycling city case studies and summary of 30 inspiring national and international best practice initiatives.

**Stakeholder engagement:** 22 guided interviews across metropolitan and regional Queensland with 25 key stakeholders representing peak bodies, advocacy groups, bicycle user groups, education providers and parents.

**Primary qualitative research:** 8 focus groups across metropolitan and regional Queensland, with 62 participants (51 per cent female/49 per cent male) representing frequent riders, infrequent riders, considerers and rejecters.

**Primary quantitative research:** online survey (n = 4352) with 3147 participants representative of the Queensland adult population, plus a boost of 411 current riders and 794 respondents via industry stakeholders.

### Key observations:

- Most Queenslanders recall riding bikes as children and have very fond memories associated with fun and freedom.
- There are two riding types: for purpose (e.g. transport, exercise) and for pleasure (e.g. recreation, social).
- Non-cyclists are generally apathetic towards bike riding; when pressed the negative perception is linked to road cycling.
- The terms ‘bike riding’ and ‘bike rider’ have a positive perception and are more associated with riding for pleasure.
- In contrast to the view that cycling is niche and extreme, bike riding represents a top five activity in Queensland.
- Bike riding encouragement programs should adopt a highly segmented approach to improve engagement and efficacy.
- Both current riders and considerers (with recreation as the driver) demonstrate the highest propensity for more riding.

### Major barriers:

- fear for personal safety (i.e. physical accidents, heavy traffic)
- fear of personal safety (i.e. aggression and abuse by drivers)
- lack of access to safe and connected infrastructure
- don’t have the equipment (e.g. bike, pump, helmet, light, lock)
- risk of embarrassment – not good enough/not fit enough
- practical concerns such as the weather and terrain
- confusion around rules (both formal and colloquial)
- lack of facilities when riding for purpose (e.g. showers, storage)
- inconvenience of riding for purpose (i.e. organisation required)
- social stigmas associated with cyclists (e.g. rich, poor)
- perception that cycling means lycra and riding on the road
- perception of cycling as a niche activity for other people
- insufficient legitimisation and normalisation of bike riding.

### Critical enablers:

- access to a working bike and accessories (e.g. helmet)
- proximity to dedicated and separated cycling infrastructure
- easy-to-use information on available bike riding routes
- nostalgia of riding as kids (i.e. memories of fun and freedom)
- immediate personal benefits (e.g. destress, energy, achievement)
- delayed benefits (e.g. physical health, cost savings, environment)
- positive bike riding culture – considered an everyday activity
- appropriate knowledge of the rules for riding a bike
- important influence of friends and family (e.g. social time)
- supportive workplaces with provision of end-of-trip facilities
- making the most of Queensland’s climate and landscape
- existing bike riding events, education and skills programs
- use of e-bikes to tackle the hills, heat and effort involved.

### Key activities to achieve more bike riding, more often:

- shift the language from cycling/cyclists to bike riding/bike riders
- raise awareness of everyday bike riding (including nostalgia)
- promote the immediate emotional benefits of bike riding
- more education to build knowledge, skills and confidence
- better information and way-finding signage on existing infrastructure
- facilitate easy, safe and enjoyable trial amongst new/lapsed riders
- increase exposure to e-bikes as a ‘new reason’ (i.e. tech focused)
- build programs for specific subgroups (e.g. women, kids, commuters)
- greater coordination and alignment amongst industry stakeholders.

### Progression of bike riding behaviour



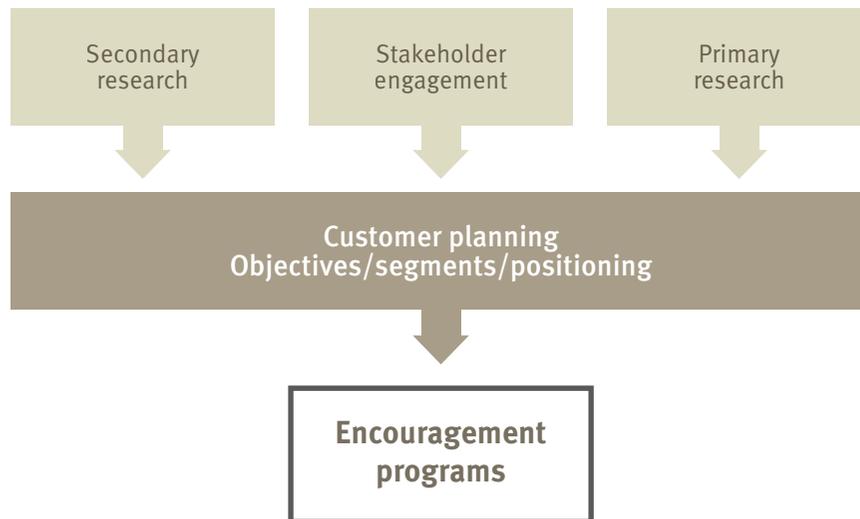
*Research shows that there is no one silver bullet to grow bike riding, as behaviour change is more of a gradual progression.*

## 2.0 Project background

In 2017, the Department of Transport and Main Roads published the *Queensland Cycling Strategy 2017–2027* with a vision for more cycling, more often. The accompanying *Queensland Cycling Action Plan 2017–2019* focuses on the practical things we need to do to encourage more bike riding.

As a natural extension of the plan, external marketing and research companies were engaged to inform future encouragement programs. This was based on insights from secondary research, stakeholder engagement and primary research through to the development of Queensland bike riding typologies.

### Overview of project methodology



## 3.0 Research approach

To understand the current market context and best practice from local and global sources, a process of secondary research and stakeholder engagement was conducted by an external marketing company in March and April 2018.

An external research company was engaged from March to July 2018 to undertake both qualitative exploration and quantitative measurement. The objective was to uncover key insights, segment the market and inform future programs.

The approach to primary research has been representative of the Queensland adult population. Importantly, this has taken into consideration both bike riders and non-riders (unlike so much existing research which has focused on riders only).



## 3.1 Secondary research

A process of secondary research was undertaken to investigate both national and international best practice bike riding encouragement programs and explore the potential relevance and application for Queensland.

To leverage available research sources and explore examples from right across the world, this consisted of:

- a comprehensive **literature review of 53 relevant cycling research papers**
- **case studies** of bike riding in Copenhagen and Chicago, two successful cycling cities
- an examination of **30 different bike riding initiatives** from Australia and overseas.

### Key insights and findings

**Most people** have experienced bike riding at some point in their life (most often as children).

The specific attitudes towards cycling vary amongst **different segments** of the population.

Overall, there's a **negative perception of cycling**, however most people have fond memories of bike riding from childhood.

Most people recognise the **major benefits of bike riding** (e.g. health, financial). Whilst this alone isn't enough, the **personal benefits** are far more motivating than community and environmental benefits.

The **barriers** to bike riding are many, varied and difficult to remove.

Some barriers exist across **all segments**: for example, fear/safety, personal confidence, lack of infrastructure, access to a bicycle, car driving habit.

Some barriers are more **segment-specific**: for example, uncool/fringe/extreme/poor activity, inconvenience, weather, topography, set-up costs, trip distance.

Some factors can be **either a barrier or enabler**: influence of family and friends, prevailing bike riding culture, proximity to cycling infrastructure.

A **tipping point** for bike riding exists where it becomes more accepted and normalised. Places that have achieved this have done so through a positive combination of policy, funding, infrastructure, advocacy, education, initiatives and campaigns.

The **normalisation of bike riding** helps to shape more positive attitudes, which is directly linked to positive shifts in actual bike riding behaviour.

Practical examples have shown that **removing barriers** associated with bike riding (both real and perceived) influences both intent and behaviour.

It has been proven that **safe and enjoyable trial or retrial experiences** for non-riders increases the likelihood of more bicycle riding in the future.

*The most effective way to grow bike riding in Queensland will be through a segmented approach that focuses on removing barriers to (re)trial, promoting personal benefits, nudging bike riding behaviour and ultimately normalising cycling amongst the wider population.*

## 3.2 Stakeholder engagement

To understand how to better support and leverage community efforts to grow bike riding, stakeholder engagement was conducted across Queensland. To ensure rich insights, this consisted of a series of in depth one-on-one interviews.

With a focus on the barriers, enablers and future opportunities, the process of stakeholder engagement encompassed:

- **22 guided interviews** with an average **duration of 1.5 hours** across metropolitan and regional Queensland – Brisbane, Cairns, Townsville, Mackay, Rockhampton, Hervey Bay and Toowoomba
- **25 key cycling stakeholders** consisting of three professional bodies/peak advocacy groups, eight bicycle user groups, four targeted cycling groups, six education providers and four interested parents.

### Key insights and findings

**Bike riding in Queensland** has not reached mass acceptance and is burdened by negative misperceptions.

There are a number of **distinct challenges** that contribute to bicycle riding being broadly perceived as a fringe activity for those ‘other’ people:

- **fear** (the biggest barrier) – safety, abuse, embarrassment
- highly **dominant car culture** in Queensland
- ongoing **tension around bike riders vs motorists**
- **grouping** of cyclists into one homogenous group
- overuse of **language** such as ‘cycling’ and ‘cyclists’
- dehumanised, lycra-clad, **‘us and them’ perception**
- **lack of knowledge of rules** (compounded by rule breaking)
- **awareness, equipment and motivation** to get started
- **different infrastructure** handled by different levels of government (often resulting in disconnected paths and facilities).

**Opportunities** to promote and grow bike riding exist in reducing these known barriers to get people (back) on a bike and then build confidence:

- rolling out **safe infrastructure** (in particular separated paths) = number one
- **reframing** from ‘cycling’ to ‘bike riding’ will help to humanise and normalise
- **educating and myth busting** for all users will help to further legitimise
- introducing **specific programs for women and children** to meet their needs
- using **social media** to promote the positive, everyday image of bike riding
- incentivising Queensland businesses to provide **end-of-trip facilities**
- **leveraging e-bikes** which minimise the impact of heat, distance and hills
- exploring **options via schools** to further educate and engage children
- **making bike riding more ‘exciting’ again**, especially for today’s kids.

Opportunities to grow bike riding in Queensland also exist in leveraging **positive triggers** which are more emotive and experience based:

- **personal benefits** (more so than community benefits)
- **nostalgia** – the fun and freedom of riding as a kid
- **trial joy** – one ride and you’ll be hooked (yet again)
- **confidence** goes a long way (knowledge + skills + experience)
- **tourism and sightseeing** aspects of riding in Queensland.

The **perceived role of government bodies** is seen as delivering infrastructure and policy, enforcing laws, and assisting cycling organisations with funding and packaged encouragement programs for local delivery.

The **perceived role of cycling organisations** is seen as liaising and advocating with all levels of government, meeting the needs of members (e.g. group rides) and delivering bike riding encouragement initiatives.

However, cycling organisations vary significantly in terms of **sophistication** and **purpose**, and face practical and ongoing challenges in areas such as **governance, insurance, support and funding**.

*The best results will be achieved when government and stakeholders work together in a coordinated way to deliver highly aligned infrastructure, policy, education and encouragement programs. To progressively grow bike riding, it will be necessary to shift the culture and influence individual behaviour.*



### 3.3 Primary research

As a core part of the project, an external research company developed and implemented a research methodology to deeply understand the attitudes, perceptions, motivations and behaviours of Queenslanders with regards to bike riding.

Taking into consideration the findings from the secondary research and stakeholder engagement, this consisted of qualitative exploration followed by quantitative measurement leading to the development of bicycle riding typologies.



### 3.31 Qualitative exploration

The qualitative research phase was designed to uncover insights and inform the quantitative research based on this approach:

- **8 focus groups** across both metropolitan and regional Queensland – Brisbane, Logan, Gold Coast, Sunshine Coast, Rockhampton and Cairns
- **62 participants** (51 per cent female/49 per cent male) representing usage-based segments of rejecters, considerers, infrequent riders and frequent riders.

#### Key insights and findings

**Bicycle riding in Queensland** is a complex and changing mix of perceptions, stigmas, behaviours, emotions, facilities and memories.

**Most people have ridden bikes as children**, with very fond memories, however bike riding typically lapses as they get older.

Cyclists fall into **two distinct groups** – those who **ride for purpose** (e.g. transport, commuting, exercise) and those who **ride for pleasure** (e.g. recreation, leisure, social).

**Purpose-riders** tend to be concerned with the more practical considerations such as cost, time and functionality.

**Pleasure-riders** tend to be concerned with emotional aspects, such as enjoyment, stress release and socialising.

It appears that there is **limited crossover** between the two groups and only a small minority go straight from no cycling to riding for purpose. So, the initial motivator to ride again is for recreation.

The terms **‘cyclist’ and ‘cycling’** have negative connotations and stigmas due to their strong association with competition, clothing (lycra) and MAMILS (middle-aged men in lycra). There’s also an ‘us and them’ mentality with perceptions of selfishness, rule breaking and lack of respect.

Cycling is therefore perceived to be a **niche activity**.

Conversely, the terms **‘bike rider’ and ‘bike riding’** are viewed positively and linked with enjoyment, leisure, experience, community and nostalgia – especially with families. This means that the language used to describe bike riding in Queensland is important.

Access to **safe and practical cycling infrastructure** is considered to be the most significant barrier and enabler of more bike riding.

The motivating benefits identified with bike riding tend to be those that are **more emotional and immediate**, such as time out, freedom and enjoyment.

The **nostalgia of bike riding** as a child is also a strong positive emotion, and therefore a potential enabler to getting back on a bike again.

**Family bike riding** is viewed positively as a way to connect with each other and the great outdoors – this tends to be instigated by mothers.

The **weather and landscape** are considered the most unique aspects of bike riding in Queensland (but only after some further probing).

The more **delayed benefits** of bike riding such as physical health, cost savings and the environment are potentially less likely to (re)motivate riders.

For **more experienced bike riders**, gamification and apps that help to monitor health and fitness are recognised as potential motivators.

*To most effectively grow bike riding in Queensland, the research suggests engaging new/existing recreational riders by shifting the language from cycling to bike riding and focusing on infrastructure, nostalgia, family and the more immediate emotional benefits of getting on a bike.*

### 3.32 Quantitative measurement

Informed by the qualitative research findings, the quantitative research was implemented using the following methodology:

- **10-15 minute** online survey to inform future encouragement programs and deliver a segmentation instrument for the Queensland market
- **4352 total research participants** right across Queensland
  - **3147 representative of the population** – riders, considerers and rejecters based on online panel
  - **411 additional riders** to statistically boost numbers (then weighted back to Queensland population)
  - **794 engaged riders** based on distribution via peak bodies and bicycle user groups (as a comparative set).

#### Key insights and findings

The Queensland market is comprised of **current riders (41 per cent), considerers (27 per cent) and rejecters (32 per cent)**. Amongst the rejecters, 17 per cent are deemed as movable and 15 per cent as immovable rejecters of bike riding.

Of those who have previously ridden a bike but not in the past 12 months, about seven in ten have ridden as an adult, **suggesting a lapse in riding** rather than no riding at all since childhood.

**Top of mind thoughts and opinions about ‘bicycle riders’ are mostly negative (57 per cent)**, even amongst current riders (47 per cent). This is primarily driven by perceptions of bike riders being annoying and dangerous.

The unprompted positive thoughts about ‘bicycle riders’ (28 per cent) are **driven overwhelmingly by the perception of health and fitness**. As expected, current riders are more positive (38 per cent) than rejecters (17 per cent).

A significant **92 per cent of Queenslanders rode a bike as a kid** and 81 per cent have positive childhood memories and recall the sense of freedom. So, the opportunity exists to **rekindle the positive associations with bike riding**.

The **main motivations for bike riding** are typically more emotional than functional. The top three stated benefits of bike riding are **health and fitness**, fun and enjoyment and relaxation and stress release.

The research highlights that **50 per cent of Queenslanders who ride a bike consider their physical fitness to be good or very good** compared to just 30 per cent of those who do not ride but are thinking about it.

The **perceived lack of safety on the road**, attitudes of drivers towards riders and lack of connected routes are the **most significant deterrents**. The thought of bike riding is connected with a genuine fear of riding on the road.

Based on attitudinal statements, there’s a continuum which spans from mostly negative views (16 per cent), **mostly neutral views (57 per cent)** and mostly positive views (27 per cent) about bike riding. That is, **the majority do not have strong views** either way.

Even the most active riders are unlikely to describe themselves as ‘cyclists’. In particular, people who typically ride for utilitarian and recreational reasons are **much more likely to identify as ‘someone who rides a bike’**.

It’s important to be realistic about more bike riding, as three of the key drivers of more bike riding are deemed to be **more off-road infrastructure (69 per cent), better directional signage (69 per cent) and more on-road infrastructure (66 per cent)**. In addition, there is potential to motivate Queenslanders with starter kits and incentives to help purchase bikes and accessories.

### 3.32 Quantitative measurement continued

For both riders and considerers, **the main potential reason for more riding, more often would be for recreation and leisure**. The preferred locations for more than seven in ten people are bicycle paths and back streets. This highlights the need to **shift the conversation** away from 'bikes and roads' to '**bikes on paths**'.

The two things that Queenslanders would like more information about are **where to find safe places to ride** (43 per cent riders/41 per cent considerers) and the **road rules and responsibilities** (38 per cent riders/35 per cent considerers).

Only a minority of current riders (29 per cent), considerers (16 per cent) and rejecters (17 per cent) consider their **knowledge of bike riding laws** to be good or very good. This is significantly higher for engaged riders linked to stakeholder groups (72 per cent).

Amongst both riders and considerers, actual knowledge of the **one metre rule** (89 per cent), **same rules for bikes and cars** (77 per cent) and **give way to pedestrians** (76 per cent) are relatively strong, reflecting the focus on these important areas.

However, the knowledge of **two abreast is legal** (52 per cent) and **riding on the footpath is legal** (47 per cent) show room for improvement. To address safety concerns, greater awareness of footpath access will be critical.

*It's important to remember the high level of apathy that exists towards bike riding in Queensland (despite the noisy extremes). To drive shifts in attitudes and behaviours will be a gradual process. It's anticipated that the most effective approach will be to develop and deliver highly targeted encouragement programs based on the market segmentation.*



## 4.0 Market segmentation

Through detailed examination and analysis of the reasons, motivations, barriers and enablers towards more bike riding, more often, a tailored segmentation model has been developed for the Queensland market.

As identified throughout the research process, the population cannot be viewed as one homogenous group. Segmentation is critical to focusing resources and informing actions to influence personal habits and social norms.

The approach to segmentation has spanned the entire Queensland adult population, not just current bike riders. Inspired by research, this process has been underpinned by social marketing and behavior change frameworks.

As a result, eight typologies have been identified within Queensland. These have been differentiated based on the key dimensions of current and future bike riding behaviour and the major reasons for riding or rejecting.

There's a further attitudinal and demographic overlay for each of the eight typologies. These typologies can be further categorised into the three broader groups of riders (41 per cent), considerers (27 per cent) and rejecters (32 per cent).

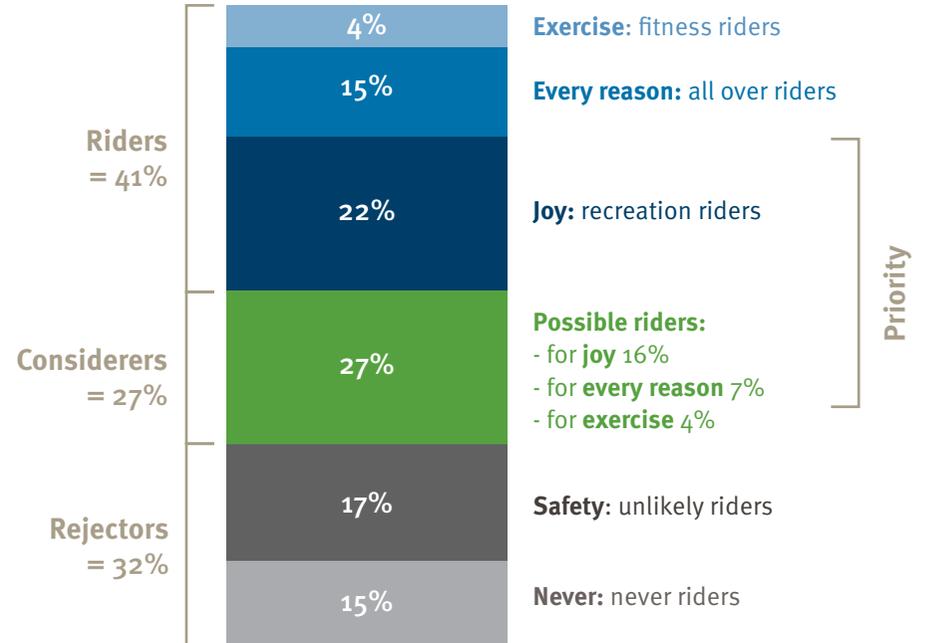
To deliver an outcome which is practical and effective, the segmentation of the Queensland market and subsequent development of bike riding typologies has taken into consideration the following success factors:



It's critical that the typologies are easy to understand and make a difference in terms of resource allocation. This methodology will enable longitudinal tracking of shifts in behaviour (i.e. movement between typologies).

The bike riding typologies will influence the ongoing development of targeted encouragement programs. To ensure the different typologies are both descriptive and memorable, the following names have been drafted:

### Bike riding typologies in Queensland



In order to positively influence both cultural and behavioural change, the encouragement programs will need to be customised and targeted to meet the needs of the higher propensity Queensland bike riding typologies.

The **priority segments**, with the **highest propensity to ride (or ride more)** are:

- **'Joy: recreation riders' (22%),**
- **'Possible riders: for joy' (16%)**
- **'Possible riders: for every reason' (7%).**

## 5.0 Major implications

The encouragement project research highlights that no single solution will shift bike riding behaviour in Queensland. Rather, infrastructure, policy and laws in combination with a series of targeted initiatives to reduce barriers and leverage enablers will be required across different bike riding typologies.

Based on the social marketing and behaviour change frameworks, the most effective way to grow bike riding will be to ‘feed the top of the funnel’. This means a genuine focus on addressing the needs of existing recreation riders (22 per cent), together with potential riders for joy (16 per cent) and every reason (7 per cent).

Easy access to safe and connected infrastructure represents both the biggest barrier to and enabler of trial and re-trial, mainly due to the safety perception. There’s no quick fix and bike paths and facilities will continue to improve over time. However, an immediate opportunity exists to improve awareness and actively showcase existing infrastructure and enhance the wayfinding signage.

It’s important to consider additional ways to reduce the fear associated with bike riding (i.e. both physical and verbal). This fear emanates from a lack of confidence, hence the need to build knowledge and skills. This fear is also due to the negative perception of cycling as a niche activity for lycra-clad road cyclists.

Conversely, anything that shifts the focus from serious cycling to everyday bike riding will help normalise this behaviour and drive (re)trial amongst the target typologies. In addition to cycling infrastructure investment, this will be achieved through a combination of overlapping and interconnected tactics, such as reframing bike riding, focusing on education, building rapport between users, promoting the immediate benefits and facilitating access to safe, unintimidating and enjoyable (re)trial situations.



Supporting this, the research indicates that specific programs targeted at boosting confidence and experience amongst sub-segments can help grow bike riding. For example, this includes access to specialised programs for both women and children (i.e. starting with recreation riding), together with initiatives to create more bike friendly workplaces and ultimately commuters.

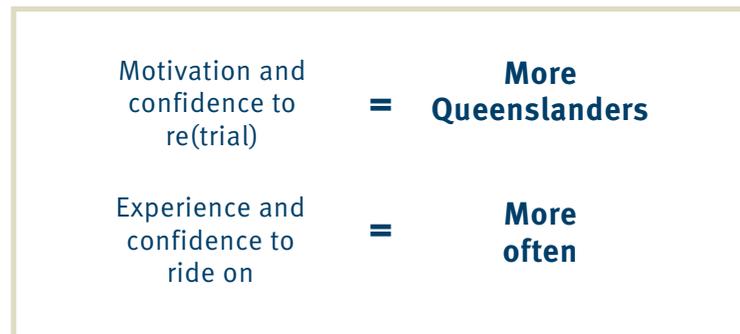
To achieve more bike riding, more often in Queensland will require a coordinated effort from all levels of government together with industry stakeholders. Encouragingly, the research indicates strong potential to build more of a bike riding culture and change individual behaviour. This is backed by inspiring and practical case studies from right around the world.

## 6.0 Conclusion

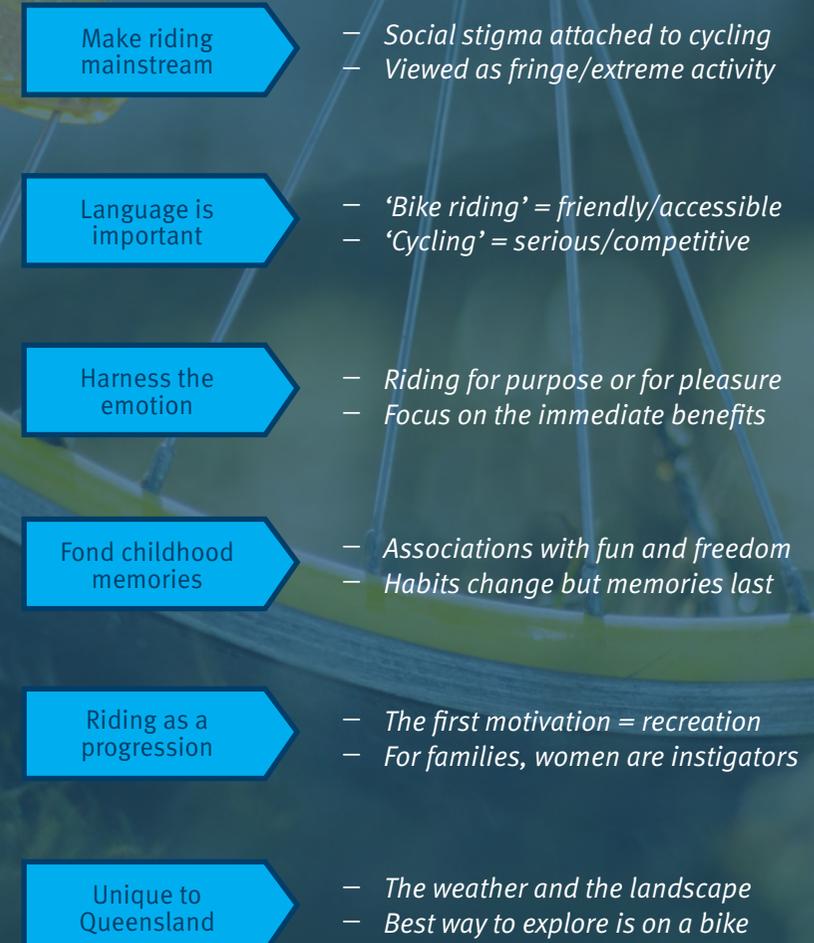
The goal is to inspire and empower more Queenslanders to ride a bike, more often. This represents a long term change program so it's important to:

- Prioritise opportunities which deliver the most impact
- Be realistic about the barriers, such as infrastructure
- Focus on 'nudging'... doing one little thing at a time.

The hard components of infrastructure/policy/laws must be interconnected with the soft components (i.e. targeted initiatives) to address the barriers and enablers, which span both bike riding culture and individual behaviour.



The big priority will be (re)trial amongst high propensity typologies where the focus is primarily riding for recreation. As such, it's recommended that these foundational insights should continue to be referred to when developing future bike riding encouragement programs:





To find even out more about bike riding  
in Queensland, please visit  
[www.tmr.qld.gov.au/cycling](http://www.tmr.qld.gov.au/cycling)