

Bicycle riding typologies for Queensland

Indepth research report 2018



Queensland
Government



Translating and interpreting assistance



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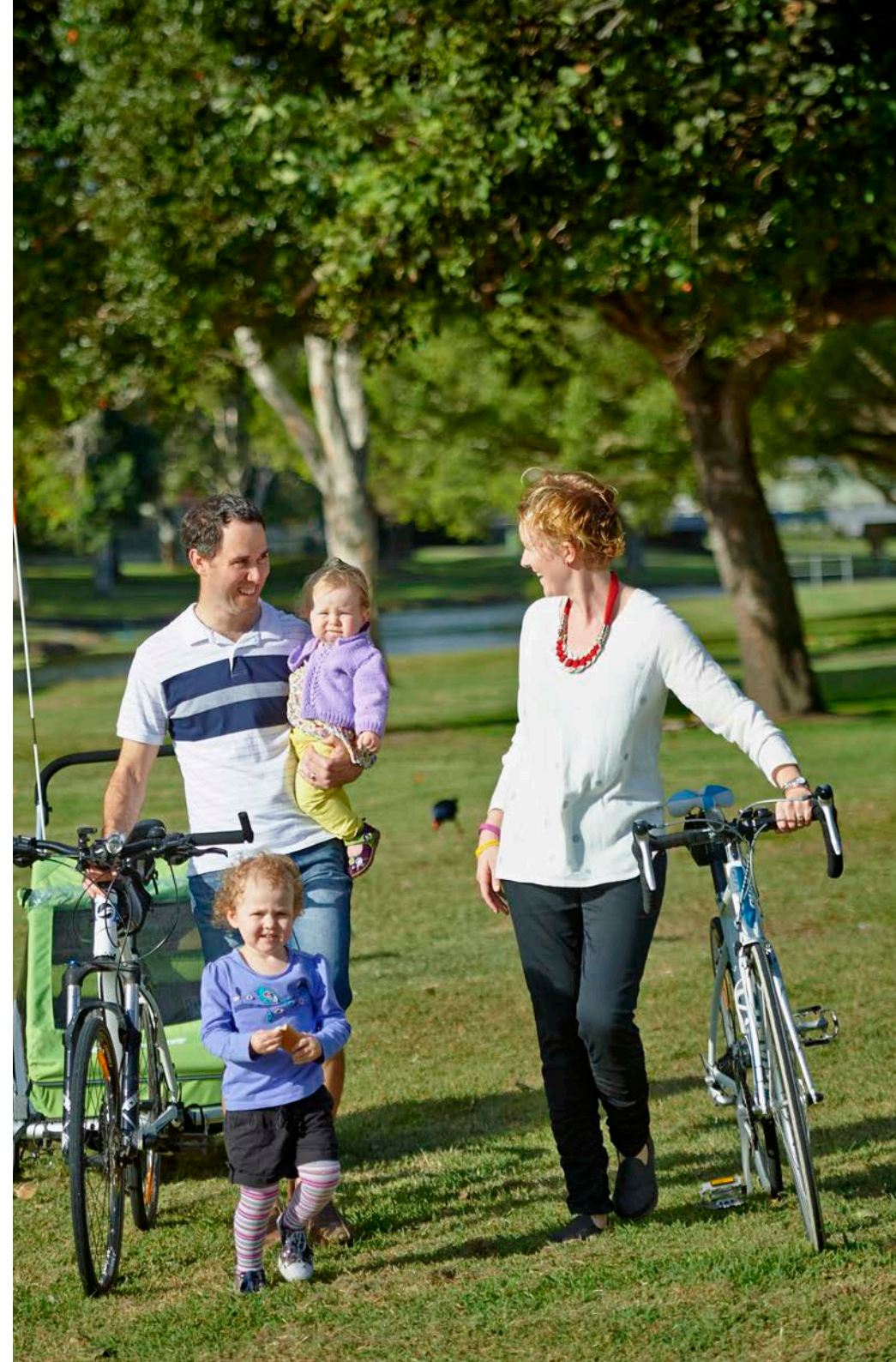
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Executive summary

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.

Key insights

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 retrieval.

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 retrieval 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.

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.

Introduction to the bicycle riding typologies

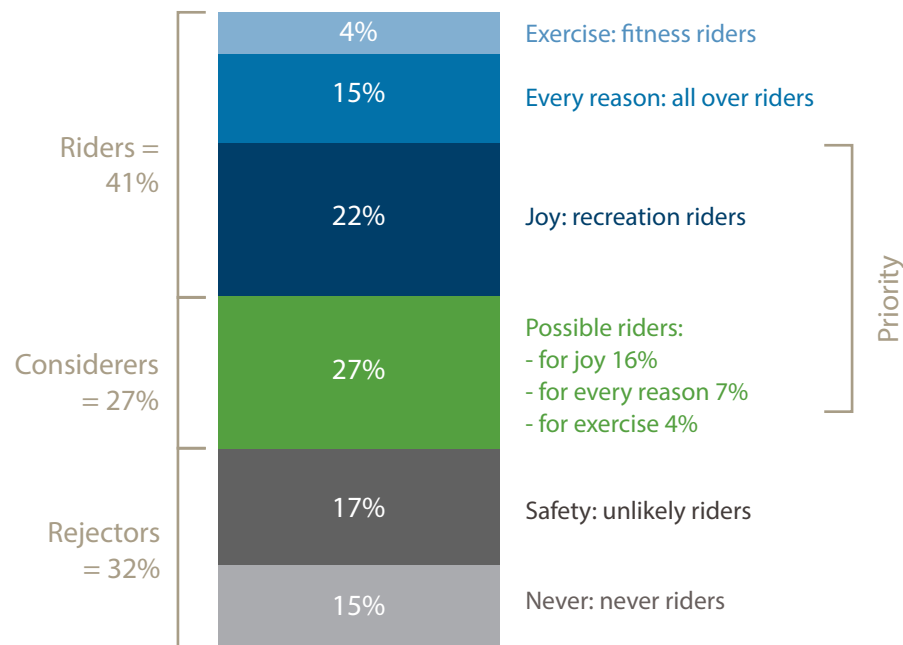
The bicycle riding typologies provide a clear way to differentiate the Queensland population along a number of key dimensions which highlight the varied behaviours, attitudes and demographics of each group. The typologies provides the mechanism for bike riding encouragement strategies to be customised and targeted to specific typologies to more successfully influence positive behaviour change.

Key dimensions

Eight segments or typologies have been identified within the Queensland market. The segments are differentiated by these key dimensions:

- Current and future bicycle riding behaviour (e.g. whether ridden in last 12 months or would consider it in the future or not)
- Reason for riding (for current riders and those who would consider it the future)
- Reason for rejecting (for those that would not consider it in the future)

The eight typologies



1. Every reason rider

A current rider who rides their bike for all reasons (getting around, commuting, recreation and fitness/sport). The most frequent riders of all segments, the Every Reason Rider will ride up to ten hours per week in moderate to heavy traffic and on the road generally. They tend to be younger and male. Despite riding frequently, they still perceive safety and road rage as barriers to riding. There is an opportunity to encourage this segment to ride more often by providing off-road and on-road infrastructure improvements and good directional signage on bikeways.

2. Exerciser

A current rider who rides for fitness and sport reasons only. The second most frequent riders of all segments, the Exerciser will ride up to ten hours per week in moderate to heavy traffic and on bike trails/off road tracks. They enjoy riding alone or in small groups. They see the most benefits of cycling to be exercise, stress reduction and relaxation. They perceive a lack of bike storage and road rage as barriers to riding. Similar to other segments there is an opportunity to encourage riding by providing good directional signage, off-road and on-road infrastructure improvements and free bicycling starter packs. They may also be encouraged by apps and competitive riding groups.

3. Joy rider

A current rider who rides for recreation, fun and enjoyment. The least frequent riders of all rider groups, the Joy Rider will ride up to two hours per week on bike/foot paths and in parks. They are the largest of all rider groups and more likely to have kids living at home. They're likely to ride for exercise and health but also as an activity with the family. They perceive safety and road rage as barriers to riding. Similar to other riding groups, there is an opportunity to encourage this segment by providing good directional signage on bikeways and improvements in on-road and off-road infrastructure.

4. Consider for every reason

Not a current rider but would consider riding in the future for all reasons (getting around, commuting, recreation and fitness/sport). The Consider for Every Reason are mostly likely to already own a bike and have the highest consideration for taking up riding again in the future. They last rode about 5 years ago and are more likely to be on a low income living at home with their parents. They perceive lack of access and road rage as barriers to riding.

Although only a small group within the overall Queensland market, they are the most ready to take up riding again. There is an opportunity to encourage this segment by providing incentives, such as monetary help to buy a bicycle or accessories.

5. Potential exerciser

Not a current rider but would consider riding in the future for fitness and sport reasons. The Potential Exerciser have the lowest consideration for taking up riding in the future. However, if they did they would want to be fitter and would consider buying a new adult bike. They perceive safety and road rage as barriers to riding.

They are a small group within the overall Queensland market and appear to be the least ready to take up riding again. However, there is an opportunity to encourage this segment by providing incentives, such as monetary help to buy a bicycle or accessories.

6. Consider for joy

Not a current rider but would consider riding in the future for recreation and leisure. The Consider for Joy are the largest of all considerer groups. They last rode about 5 years and see riding as a way to have some fun with the kids. They would consider buying a new or second hand adult bike, but might also consider using a bike sharing service. They perceive safety and road rage as barriers to riding.

7. Need to feel safe

Would not consider riding in the future because don't feel safe riding. The Need to Feel Safe group reject the idea of cycling in the future mostly for safety reasons. They also lack confidence and believe their daily trips are too far. Most did ride as child though, and have fond memories of it. They can see benefits in cycling mostly around exercise and keeping healthy. Around one in five are open to considering riding in the future, if motorist attitudes improved and they felt safer about it.

8. Never rider

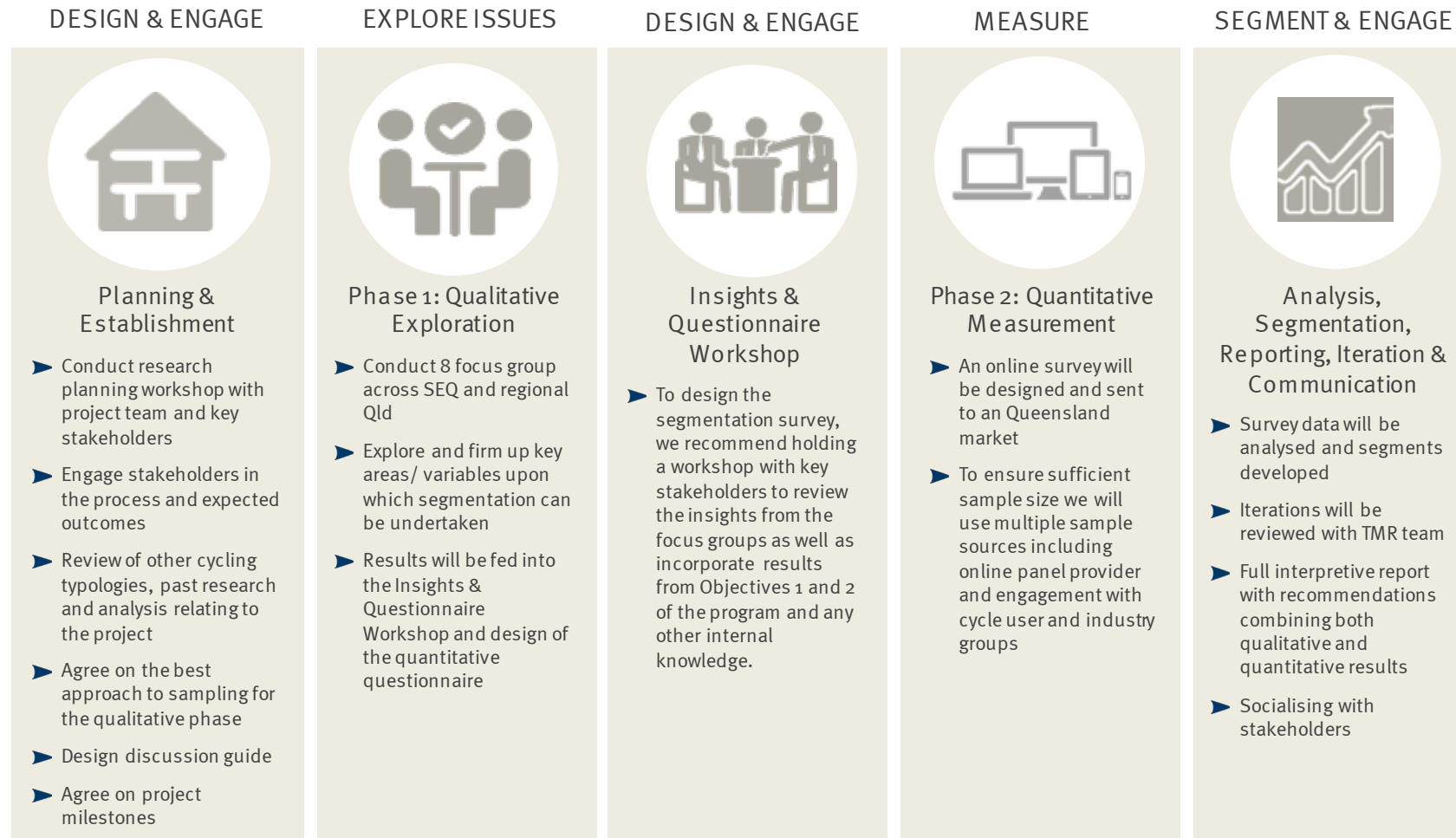
Would not consider riding in the future because they're not interested in riding and are physically unable. The Never Rider group reject the idea of cycling because they have no interest and just dislike it. Most did ride as child though, and have fond memories of it. They can see benefits in cycling mostly around exercise and keeping healthy. Around one in ten are open to considering riding in the future, if their health improved.



Part 1 - Research approach

Research overview

The project followed a two stage approach incorporating both qualitative and quantitative research.



Quantitative research approach

This report is based on quantitative research involving 4352 Queenslanders. It follows an initial qualitative phase of focus groups which aimed to explore attitudes and behaviours in depth (a separate presentation of results is available for the qualitative research). This second phase quantifies the results and provides a segmentation of the market to generate a number of cycling typologies.

Method:

An online 15 minute survey was conducted from the 4 – 22 June 2018.

The General Population sample was sourced from the Research Now SSI online panel. No quotas were set, however a representative mix of age, gender and location was obtained to allow for weighting. A boost of current riders within the wider population was also obtained. This was to ensure a large enough sample size was achieved to allow for segmentation analysis.

The Stakeholder sample was sourced from TMR contacts and through posting on social media. This group has been treated separately in all analysis and reporting.

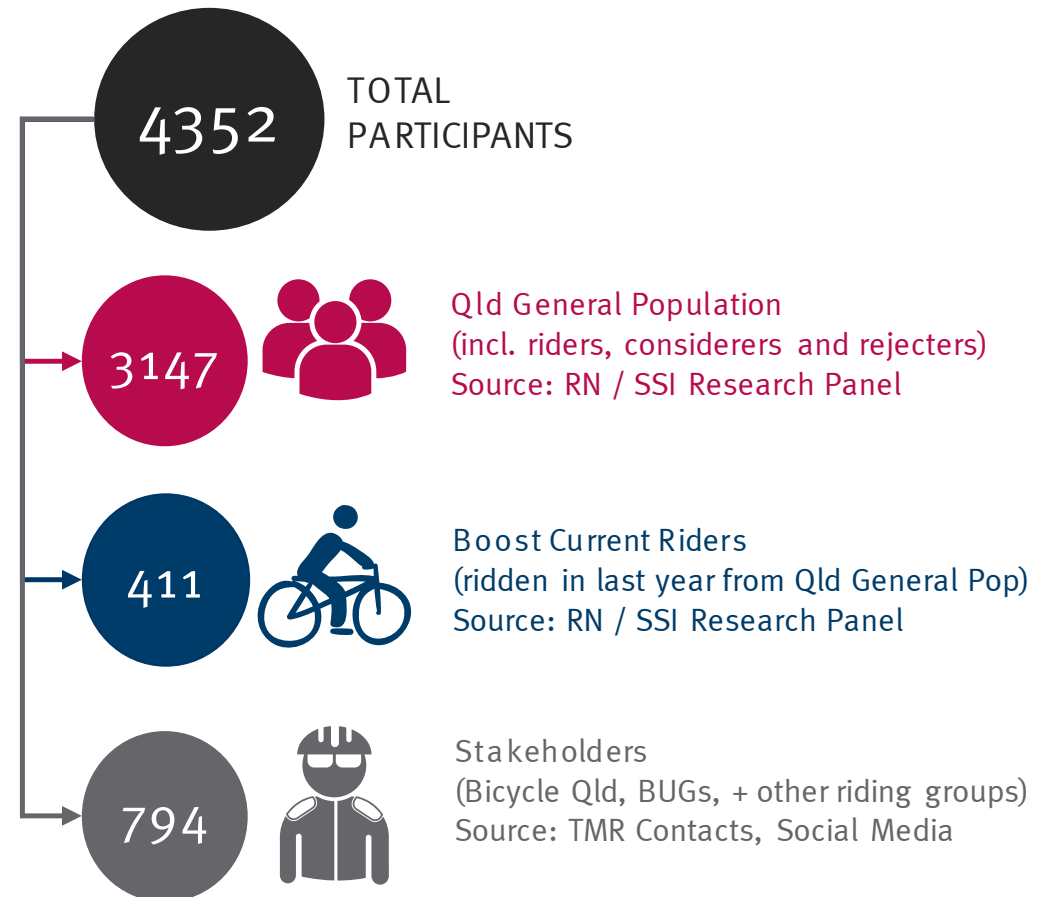
Weighting:

To further ensure the representativeness of the data, the General Population sample was post weighted to match age, gender and location proportions that exist within the population (sourced from ABS Census data). The boost component was weighted down to current rider proportion from the weighted General Population sample.



5 – 15min
Online
questionnaire

Data collection
4 – 22 June 2018



Report interpretation

General interpretation

Please note the following when interpreting this report:

- Where questions do not sum to 100%, this is due either to rounding or multiple responses.
- Please be cautious in interpreting data with base sizes of $n \leq 30$.
- The base note included in the bottom left corner of each slide represents the sample size (the number of participants who have answered the relevant question) as well as the actual question wording.
- Qualitative and open-ended questions have been coded or organised into themes where ever possible. Verbatims have also been included as illustration of results.

Significant differences

- A statistically significant difference is where the difference is large enough that it is a “real” difference and not just a by product of the margin of error associated with the sample size of surveys completed.
- Data is shown at a combined total level, with key statistically significant differences between groups shown where applicable. Please note that two different types of significance testing have been used.
- For demographics, column comparisons have been used to show which groups are significantly different relative to other groups (e.g. Compared to older participants, those below 54 are more likely to feel a lack of knowledge of safe bicycle routes is a barrier to riding more often).
- For segments, groups are compared to the net to determine significant differences. This means that certain segments will be significantly higher or lower than the overall score (e.g. Every Reason Considerers and Considerers for Joy are most likely to feel a lack of knowledge of safe bicycle routes is a barrier to riding more often. Joy Riders are the least likely segment to view this as a barrier to riding).
- Significant differences, where they occur, have been outlined on the relevant charts and are indicated as follows: Figures in **GREEN** are significantly greater then figures in **RED**.



Part 2 - Cycling typologies

Cycling typologies

The cycling typologies provide a clear way to differentiate the Queensland population along a number of key dimensions which highlight the varied behaviours, attitudes and demographics of each group. A total of eight typologies have been identified within the Queensland Market as shown. They can be further categorised into the three broader groups of Current Riders, Considerers and Rejecters.

Current Riders



1. EVERY REASON RIDER
A current rider who rides their bike for all reasons (getting around, commuting, recreation and fitness/sport).



2. EXERCISER
A current rider who rides for fitness and sport reasons only.



3. JOY RIDER
A current rider who rides for recreation, fun and enjoyment.

Considerers



4. CONSIDER FOR EVERY REASON
Not a current rider, but would consider riding in the future for all reasons (getting around, commuting, recreation and fitness/sport).



5. POTENTIAL EXERCISER
Not a current rider, but would consider riding in the future for fitness and sport reasons.



6. CONSIDER FOR JOY
Not a current rider, but would consider riding in the future for recreation and leisure.

Rejecters



7. NEED TO FEEL SAFE
Would not consider it in the future because doesn't feel safe riding.



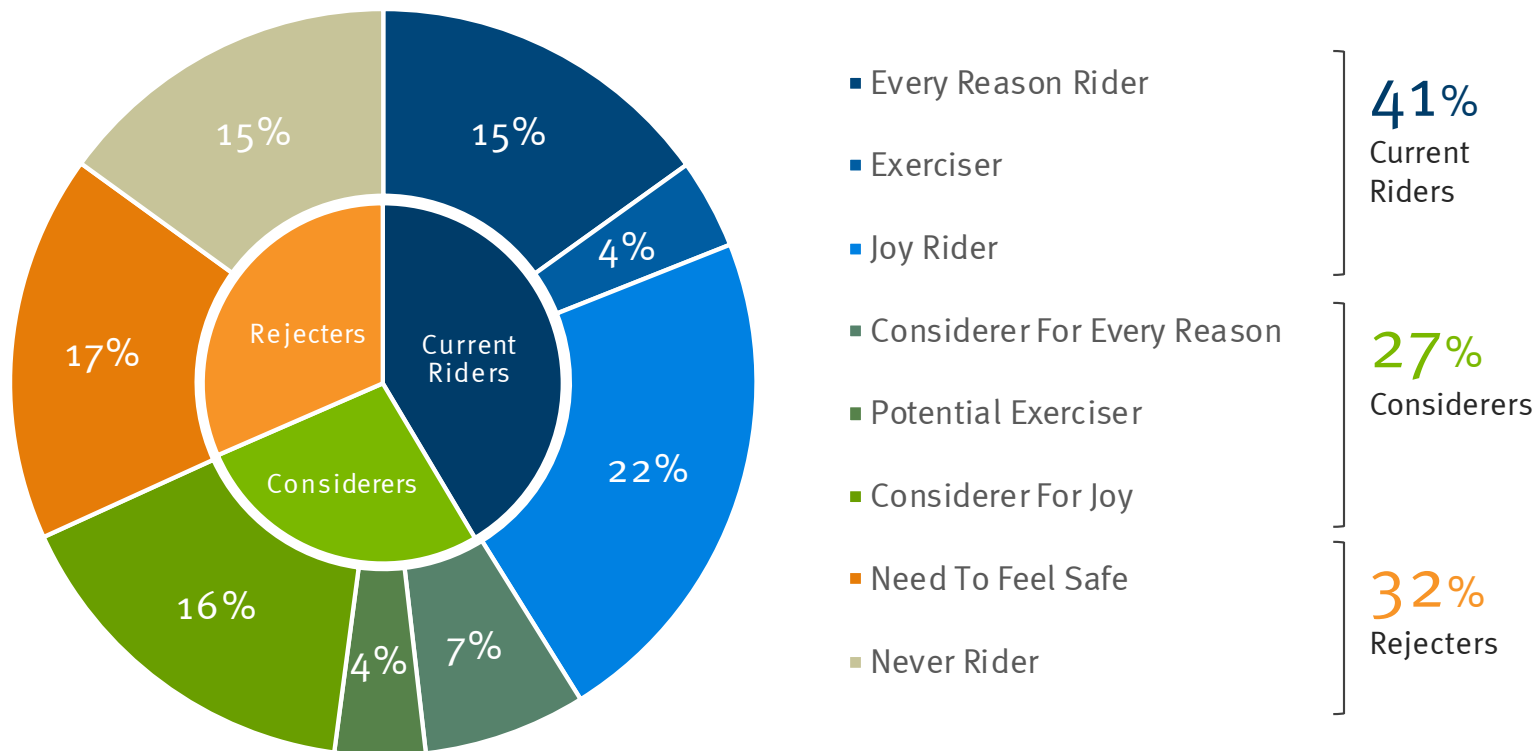
8. NEVER RIDER
Would not consider riding in the future because they're not interested in riding or are physically unable.

Cycling typology size in market

The largest group are Current Riders (41%) followed by Rejecters (32%), suggesting that while two in five currently ride around one in three reject this notion. Just over one-quarter of the market (27%) would consider riding in the future.

Joy Riders are the largest Rider group (at 22% of the market), with Considerer counterparts, Considerers for Joy, the largest of that segment (at 16% of the market). Almost half of rejecters (17%) fall into the Need to Feel Safe segment, meaning that while they currently do not ride, they might if they felt safe and secure.

This suggests high potential to convert those who do not currently ride and would consider it (44%) – those being the Considerer for Every Reason, Potential Exerciser, Considerer for Joy and to a lesser extent, Need to Feel Safe.



Base: All respondents (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551, Need to Feel Safe n=611, Never Riders n=544)

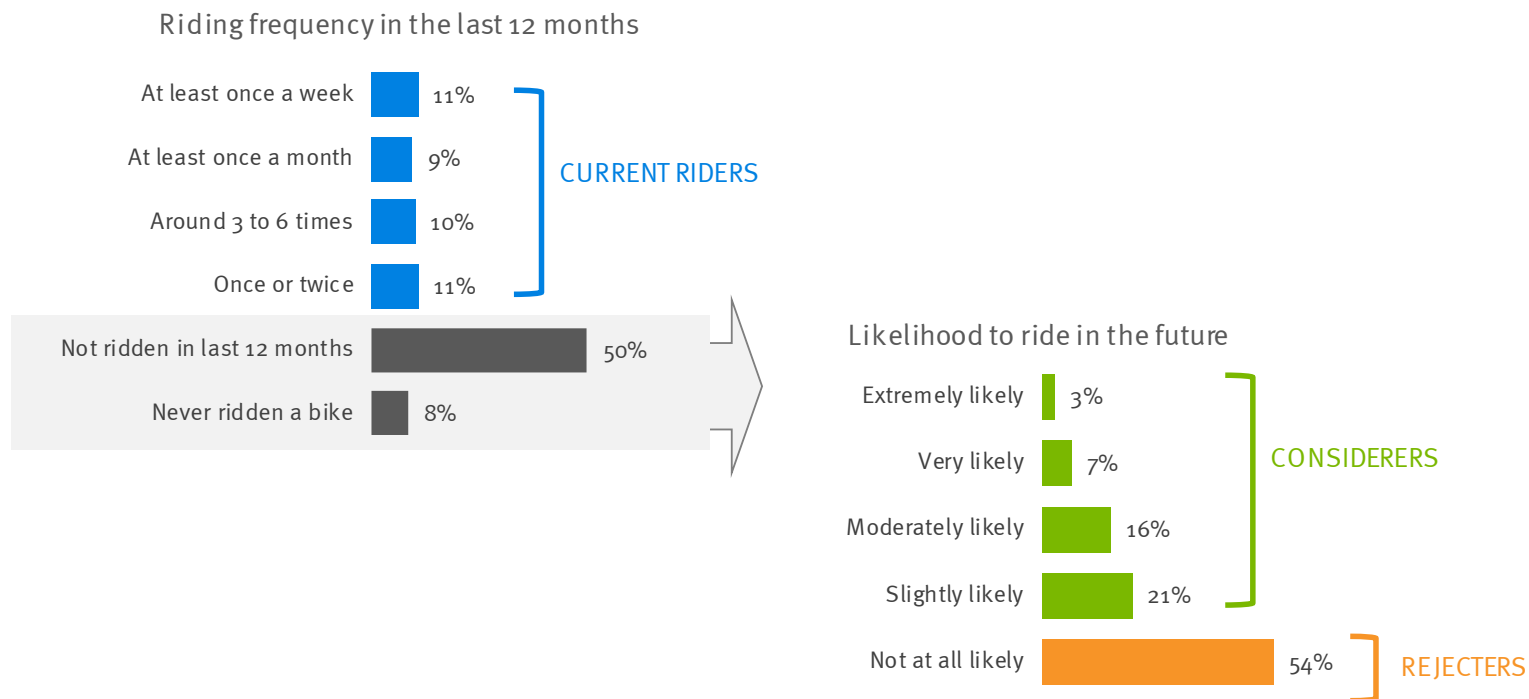
Key dimensions of typologies

There are three key dimensions that differentiate the eight segments or typologies:

1. Current and future riding behaviour
2. Reason for riding
3. Reason for rejecting

Current and future riding behaviour

This dimension classifies people into three main groups; Current Riders (those who have ridden in last 12 months), Considerers (those who would consider riding in the future) and Rejecters (those who would not consider riding in the future).



Base: All respondents (n=3558) QA3 How often have you ridden a bicycle in the past 12 months for any reason? Base: Respondents who have not ridden in the past 12 months or have never ridden a bike (n= 2049) QA5 How likely are you to consider riding a bicycle in the future?

Reason for riding

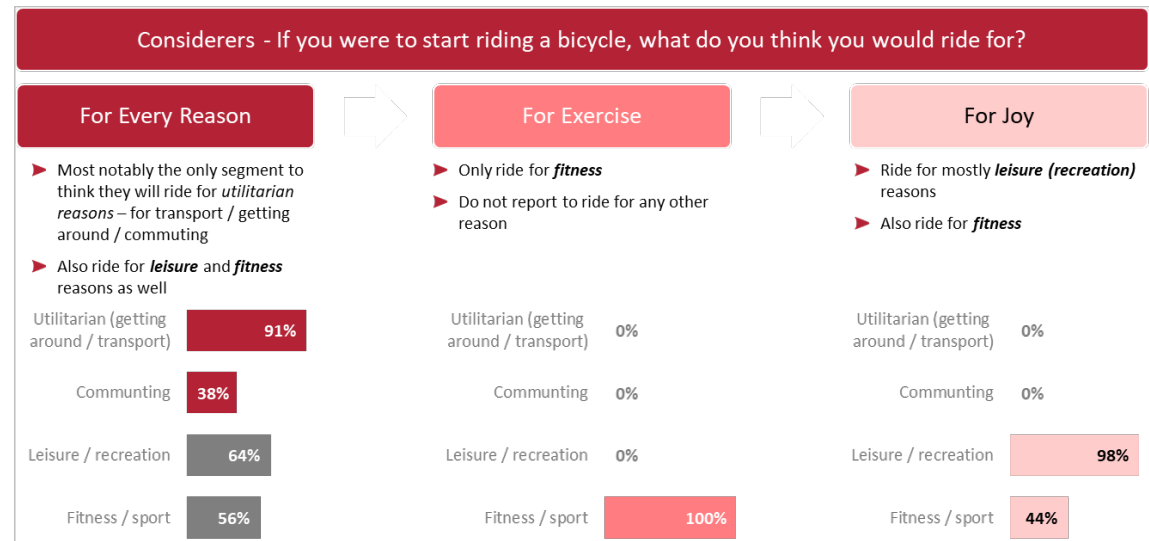
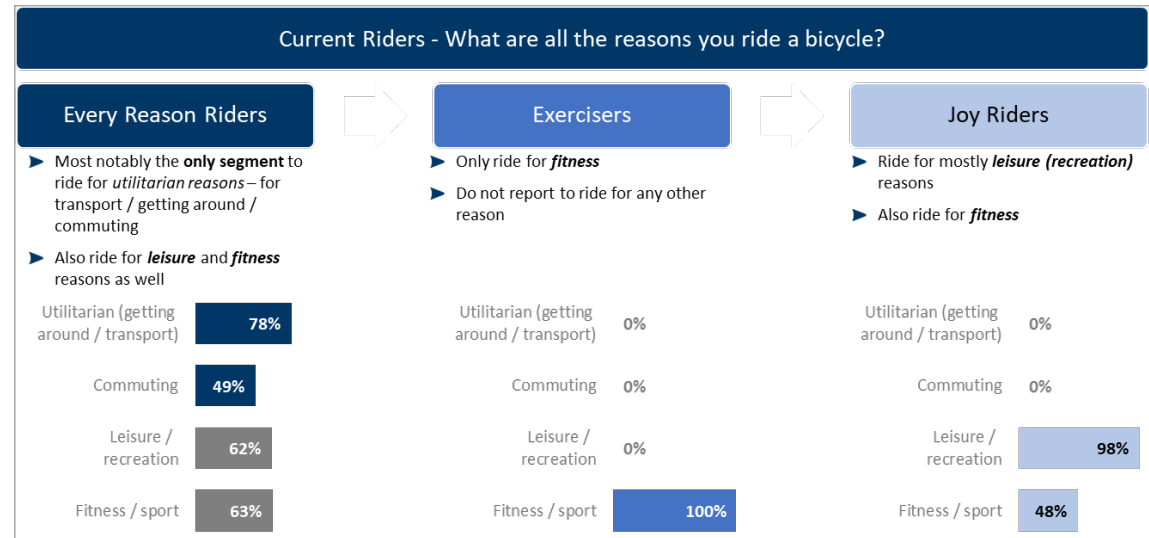
This dimension classifies people by their reported reason for riding, or reasons they would consider riding in the future; either for

- (1) getting around,
- (2) commuting,
- (3) recreation,
- (4) fitness / sport or a combination of these.

Three key groups appeared within this dimension in both the Current Riders and Considerers groups;

- (1) those that ride / would ride for every reason,
- (2) those that ride / would ride mostly for recreation (and to a lesser extent also for fitness/sport),
- (3) those that ride / would ride only for fitness / sport.

Every Reason Riders and Considerers are unique as they are the only groups that report riding for commuting and getting around.



Base: Weighted Current Riders General Population + Boost (n=1,513) QC1: What are all the reasons you ride a bicycle?

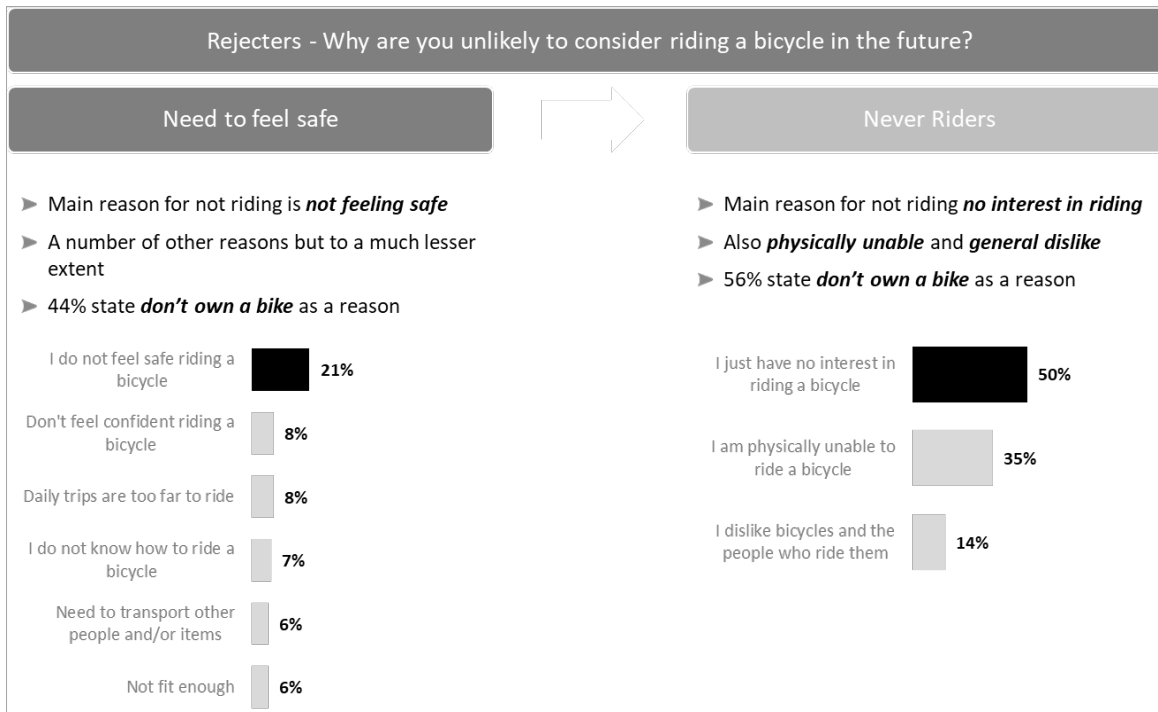
Base: Weighted Considerers (n=898) QC1: If you were to start riding a bicycle, what do you think you would ride for?

Reason for rejecting

This dimension classifies people by their reported reason for rejecting riding.

Two key groups appeared within this dimension;

- (1) those that reject mostly for reasons of safety (amongst other), or
- (2) those that reject due to no interest, a general dislike or report not physically being able to.



Base: Weighted Rejecters (n=1,155) QA5b What is the MAIN reason? (Why are you unlikely to consider riding a bicycle in the future?)



Other dimensions of typologies

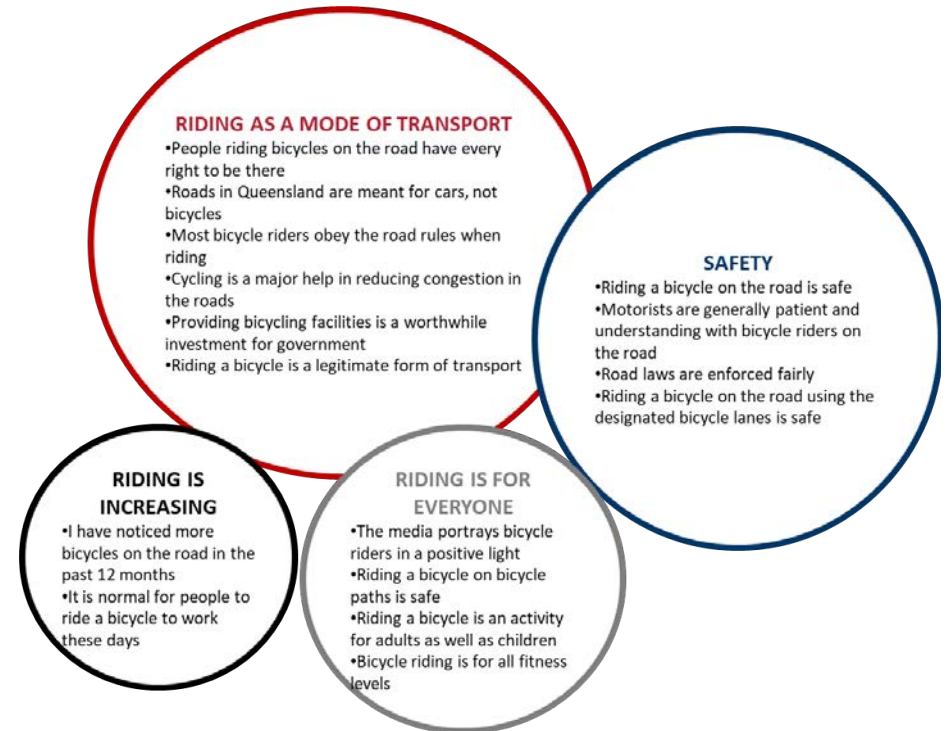
Attitudes

Another way to develop typologies or segments is by examining people’s attitudes. This is particularly useful when people group together on different attitudinal statements to form typologies of a particular mindset. When undertaking the segmentation of the Queensland market, we found there to be a continuum of attitudes towards cycling ranging from positive to negative.

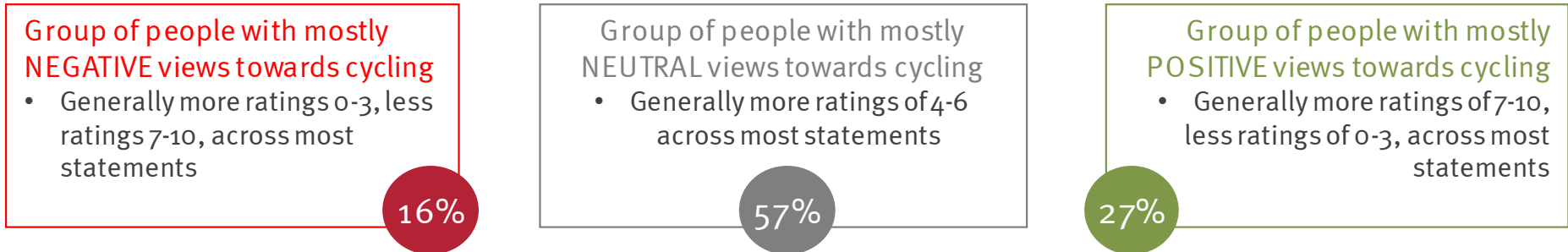
Overlaying typologies and attitudes

Not surprisingly, there appears to be a link between attitudes and current / future riding behaviour. More specifically:

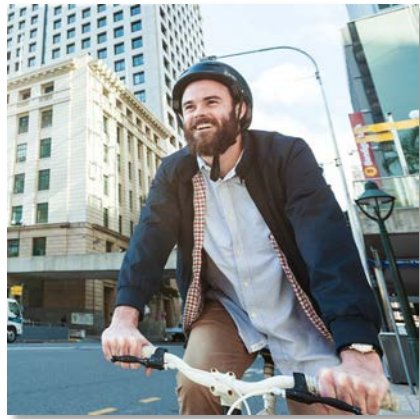
- People with positive views about cycling are more likely to be Every Reason Riders (the most frequent riders of all groups)
- People with neutral views about cycling are for more likely to be Considerers (particularly For Joy and Potential Exercisers)
- People with negative views are more likely to be Rejecters (Need to feel Safe, Never Riders)



Continuum of attitudes from negative to positive



Part 3 - Typology personas



Anthony, 25 EVERY REASON RIDER

"I'll ride my bike for pretty much any reason, but mostly for getting around – like to work, uni and the shops."

The most frequent riders of all segments, the Every Reason Rider will ride up to ten hours per week in moderate to heavy traffic and on the road generally. They're likely to ride for exercise and health but also for transportation and recreation. Despite this, they still perceive safety and road rage as barriers to riding. There is an opportunity to encourage this segment by providing good directional signage on bikeways.

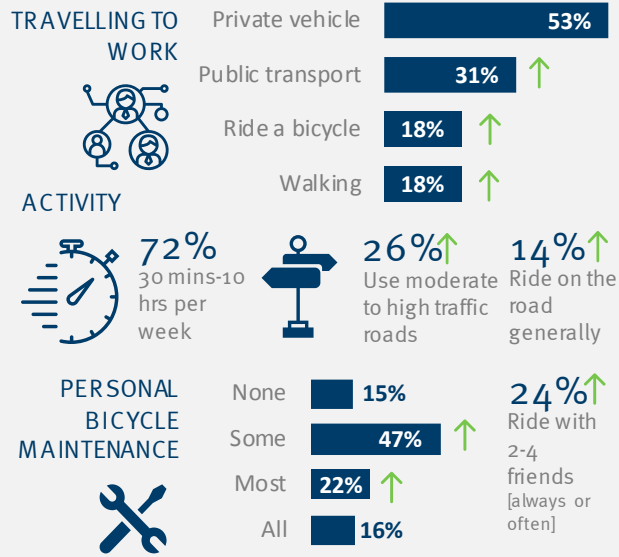
15%
of Qld pop

2.3 Adult "ready to ride" bikes in household
 1.1 Child "ready to ride" bikes in household

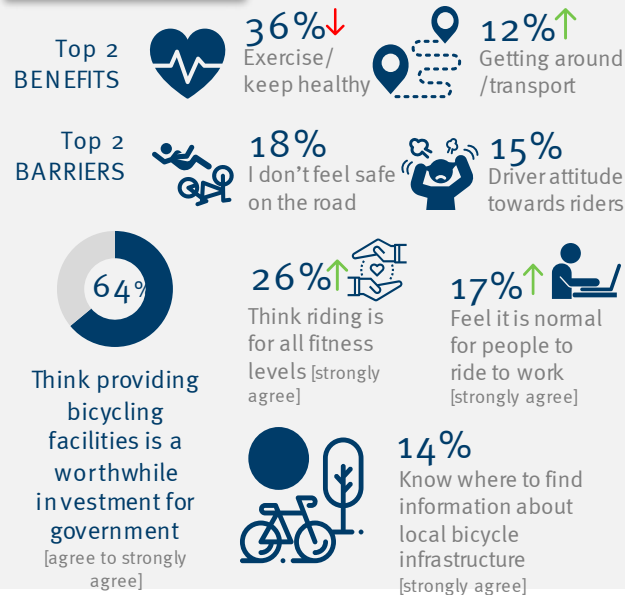
- Getting around ✓
- Commuting ✓
- Recreation ✓
- Fitness / Sport ✓

Ride once a week **39%**
Ride once a month **25%**
Ride 3-6 times a year **21%**
Ride 1-2 times a year **15%**

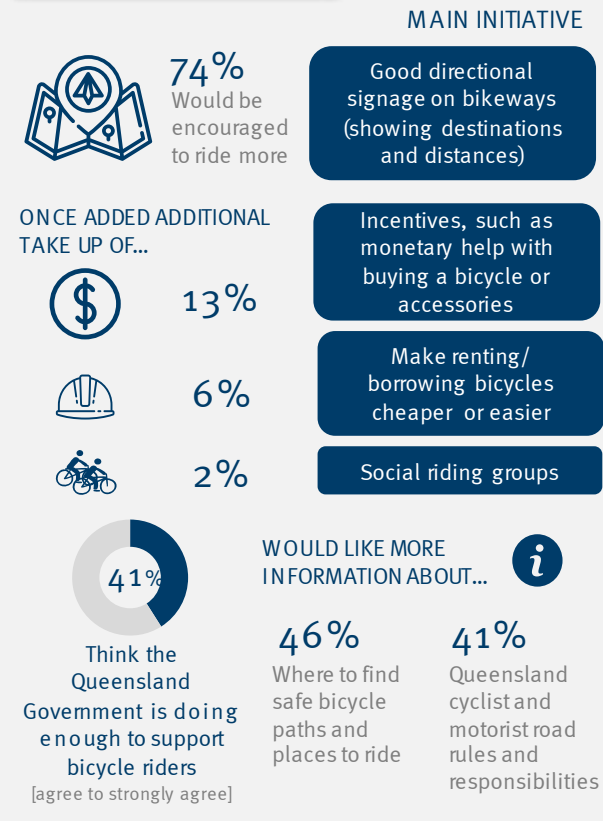
BEHAVIOURS



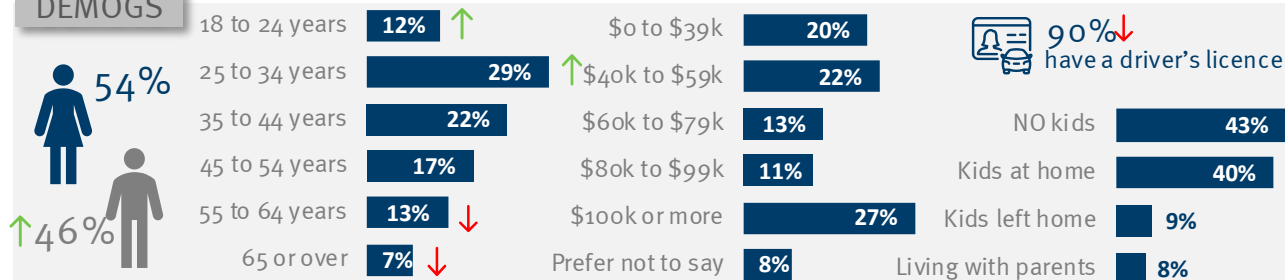
ATTITUDES



ENCOURAGEMENT



DEMOGS





Lee, 38 EXERCISER

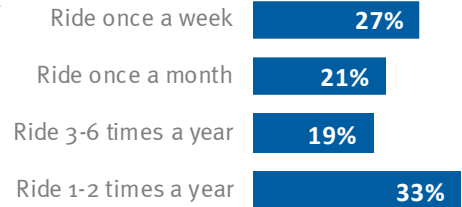
"I ride my bike for fitness and enjoy riding alone or in small groups. On a good weekend I'll ride 50-70kms and then treat myself to a coffee."

The second most frequent riders of all segments, the Exercise Rider will ride up to ten hours per week in moderate to heavy traffic and on bike trails/off road tracks. They're likely to ride alone for exercise and health but also for relaxation. Despite this, they still perceive lack of bike storage and road rage as barriers to riding. Similar to other segments there is an opportunity to encourage this segment by providing good directional signage. They are also likely to be encouraged by apps and competitive riding groups.

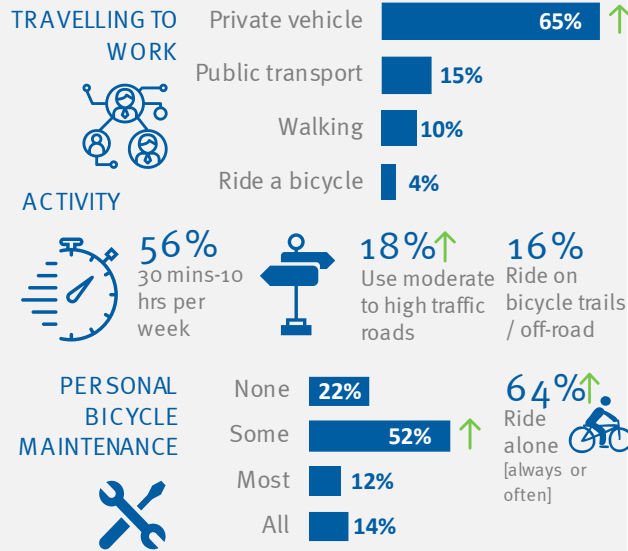
4%
of Qld pop

1.6 Adult "ready to ride" bikes in household
0.9 Child "ready to ride" bikes in household

- Getting around
- Commuting
- Recreation
- Fitness / Sport ✓



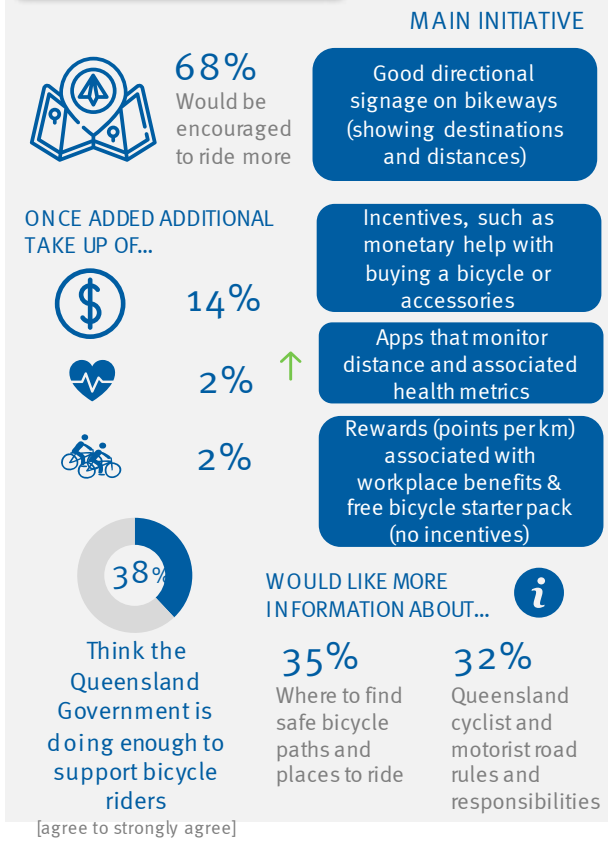
BEHAVIOURS



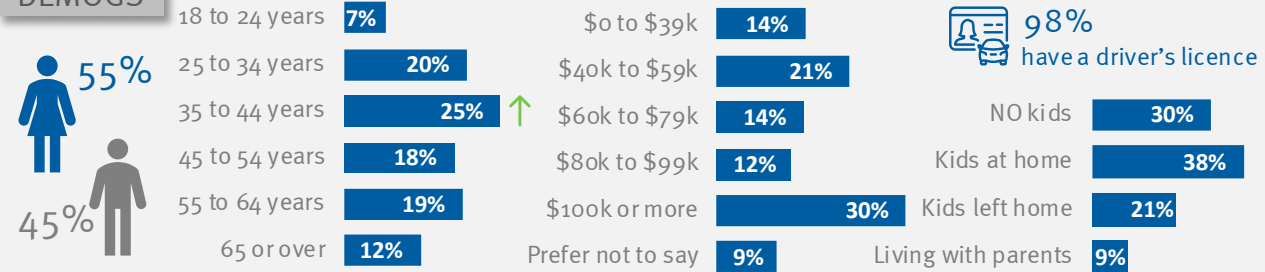
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ENCOURAGEMENT



DEMOGS



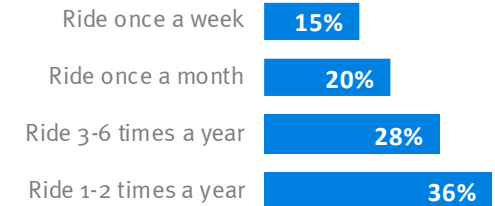


Kate, 41 JOY RIDER

"I ride my bike for leisure and recreation, but also to keep fit. In the afternoons, the kids and I like to head down to the park and have a ride. It's an activity the whole family can enjoy."

The least frequent riders of all rider groups, the Joy Rider will ride up to two hours per week on bike/foot paths and in parks. They're likely to ride for exercise and health but also as an activity with the family. Despite this, they still perceive safety and road rage as barriers to riding. There is an opportunity to encourage this segment by providing good directional signage on bikeways.

22%
of Qld pop



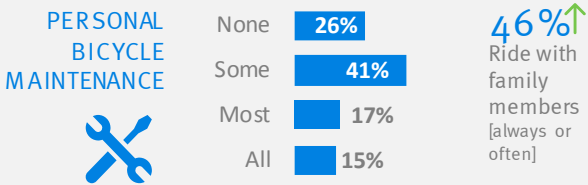
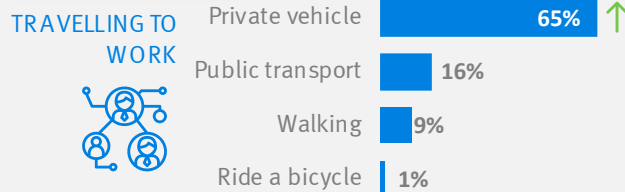
Getting around

Commuting

Recreation ✓

Fitness / Sport ✓

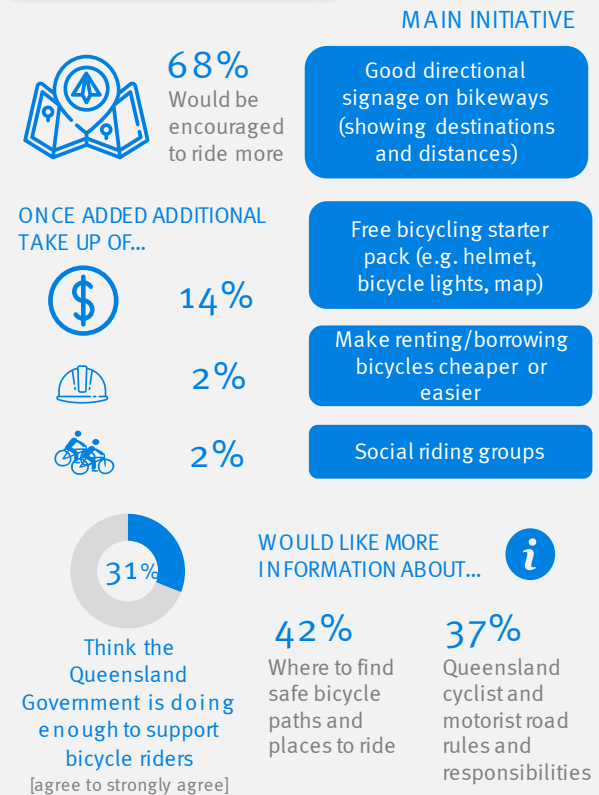
BEHAVIOURS



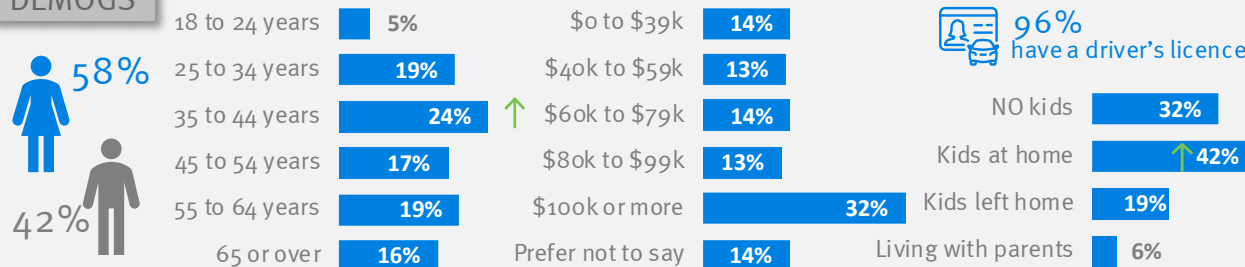
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ENCOURAGEMENT



DEMOGS





7%
of Qld pop

Tom, 28 CONSIDER FOR EVERY REASON

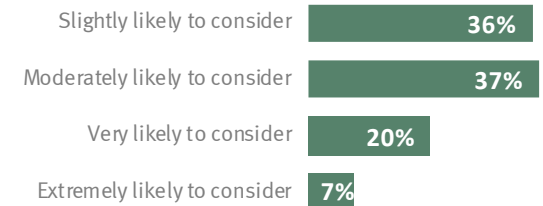
"I haven't ridden a bike recently. Maybe about 5 years ago. I would consider taking it up again probably for getting to the shops or work."

The Considerer for Every Reason are mostly likely to already own a bike and have the highest consideration for taking up riding again in the future. They're likely to want to ride for exercise and health but also for transport. They perceive lack of access and road rage as barriers to riding. There is an opportunity to encourage this segment by providing incentives, such as monetary help to buy a bicycle or accessories.

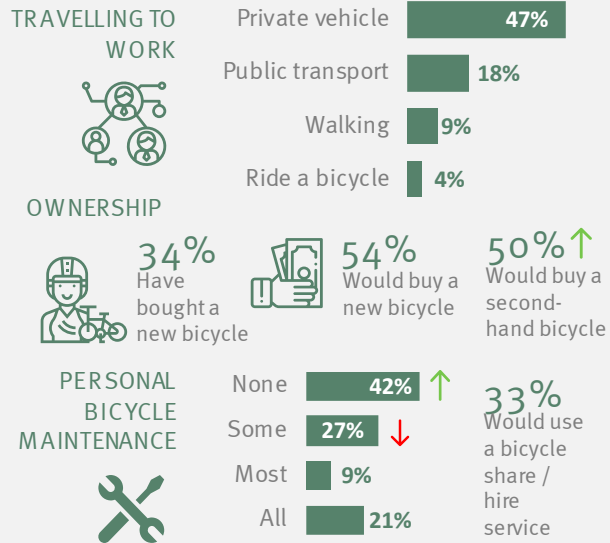
- Getting around ✓
- Commuting ✓
- Recreation ✓
- Fitness / Sport ✓

1.8 Adult "ready to ride" bikes in household

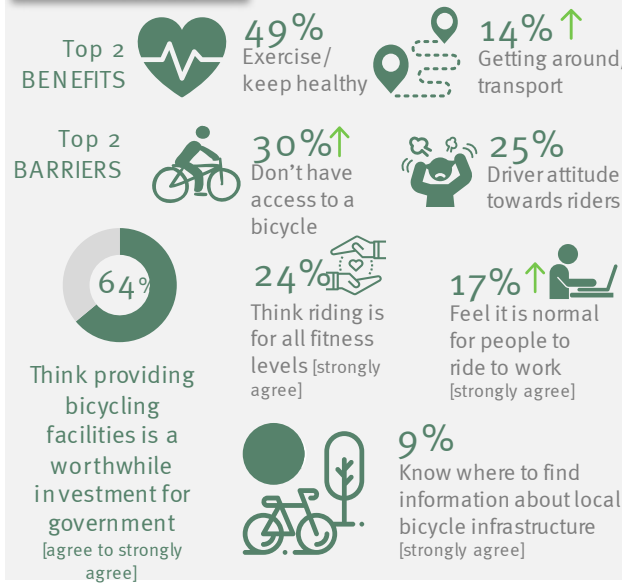
0.3 Child "ready to ride" bikes in household



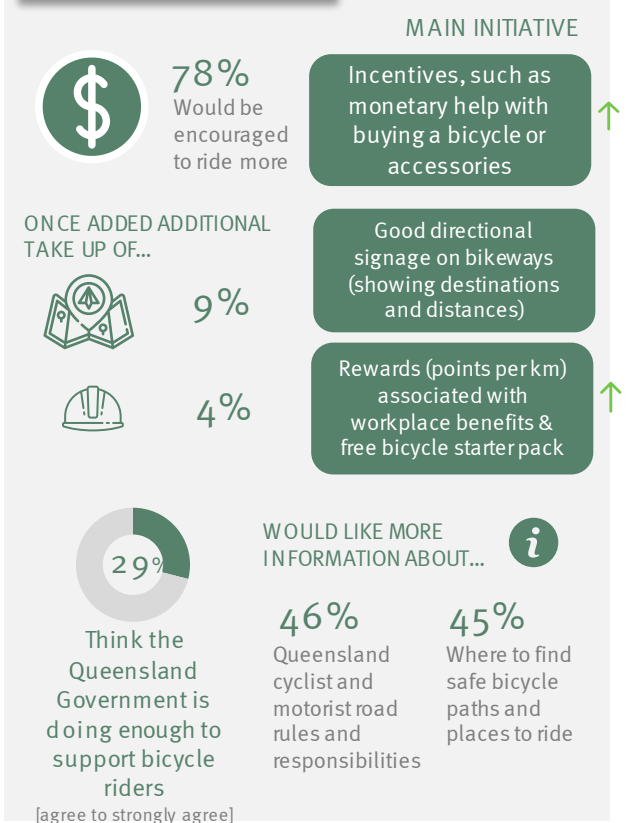
BEHAVIOURS



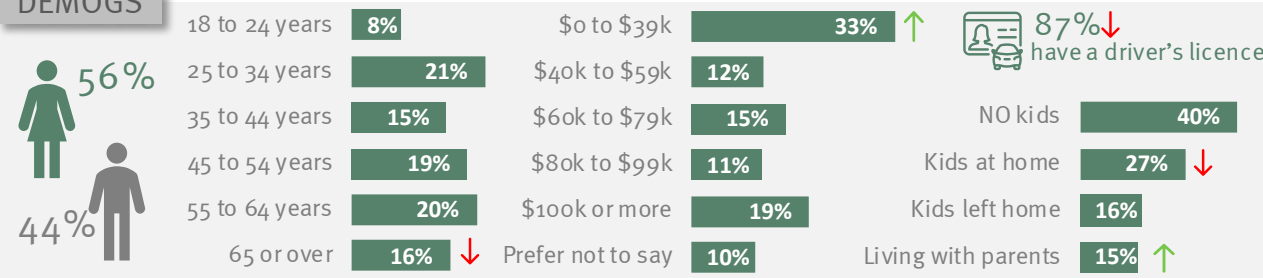
ATTITUDES



ENCOURAGEMENT



DEMOGS





Jemma, 33 POTENTIAL EXERCISER

“I’ve fallen out of practice riding a bike, but I might consider getting back into it once I get more fit. Although, I’d probably need some help choosing a bike, I haven’t bought one by myself before.”

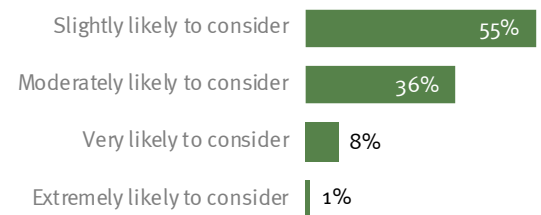
The Potential Exerciser have the lowest consideration for taking up riding in the future. However, if they did they’re likely to want to ride for exercise and health and would consider buying a new adult bike. They perceive safety and road rage as barriers to riding. There is an opportunity to encourage this segment by providing incentives, such as monetary help to buy a bicycle or accessories.

4%
of Qld pop

- Getting around
- Commuting
- Recreation
- Fitness / Sport ✓

0.6 Adult “ready to ride” bikes in household

0.8 Child “ready to ride” bikes in household



BEHAVIOURS

TRAVELLING TO WORK

- Private vehicle: 50%
- Public transport: 17%
- Walking: 5%
- Ride a bicycle: 0%

OWNERSHIP

- Have bought a new bicycle: 33%
- Would buy a new bicycle: 32% ↓
- Would buy a second-hand bicycle: 14% ↓

PERSONAL BICYCLE MAINTENANCE

- None: 65% ↑
- Some: 20% ↓
- Most: 6% ↓
- All: 9%
- Would use a bicycle share / hire service: 9%

ATTITUDES

Top 2 BENEFITS

- Exercise/keep healthy: 74% ↑
- Strong no.1 benefit with no clear second

Top 2 BARRIERS

- I don't feel safe on the road: 23%
- Driver attitude towards riders: 21% ↑

52% Think providing bicycling facilities is a worthwhile investment for government [agree to strongly agree]

23% Think riding is for all fitness levels [strongly agree]

10% Feel it is normal for people to ride to work [strongly agree]

5% Know where to find information about local bicycle infrastructure [strongly agree]

ENCOURAGEMENT

MAIN INITIATIVE

- 57% Would be encouraged to ride more
 - Incentives, such as monetary help with buying a bicycle or accessories
- 13% ONCE ADDED ADDITIONAL TAKE UP OF...
 - Good directional signage on bikeways (showing destinations and distances)
 - Apps that monitor distance and associated health metrics
- 2%
 - Would like more information about...
- 26% Think the Queensland Government is doing enough to support bicycle riders [agree to strongly agree]
 - 36% Where to find safe bicycle paths and places to ride
 - 26% Queensland cyclist and motorist road rules and responsibilities

DEMOGS

18 to 24 years	5%	\$0 to \$39k	24%	92% have a driver's licence
25 to 34 years	17%	\$40k to \$59k	17%	
35 to 44 years	16%	\$60k to \$79k	10%	NO kids: 35%
45 to 54 years	24%	\$80k to \$99k	8%	Kids at home: 32%
55 to 64 years	22%	\$100k or more	27%	Kids left home: 20%
65 or over	16%	Prefer not to say	14%	Living with parents: 12%

61% (Female icon)
39% (Male icon)



Sarah, 48 CONSIDER FOR JOY

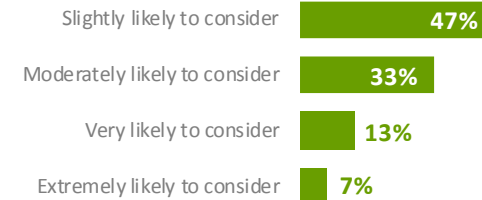
16%
of Qld pop

“I don’t currently ride a bike, the last time was probably about five years ago. I’d consider taking it up again, as a way to have some fun with the kids. Although, I’d need to look into safe areas for us to ride.”

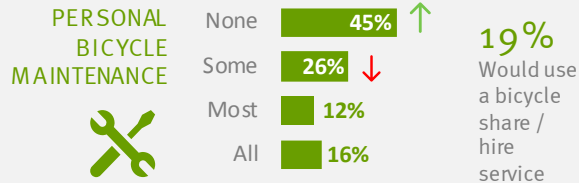
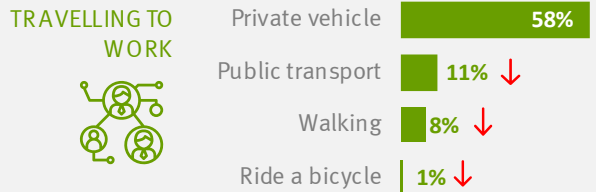
The Considerer for Joy are the largest of all considerer groups. They would consider buying a new or second hand adult bike, but might also consider using a bike sharing service. They see the main benefit of cycling for exercise and health. They perceive safety and road rage as barriers to riding. There is an opportunity to encourage this segment by providing good directional signage on bikeways.

- Getting around
- Commuting
- Recreation ✓
- Fitness / Sport ✓

0.8 Adult “ready to ride” bikes in household
 0.7 Child “ready to ride” bikes in household



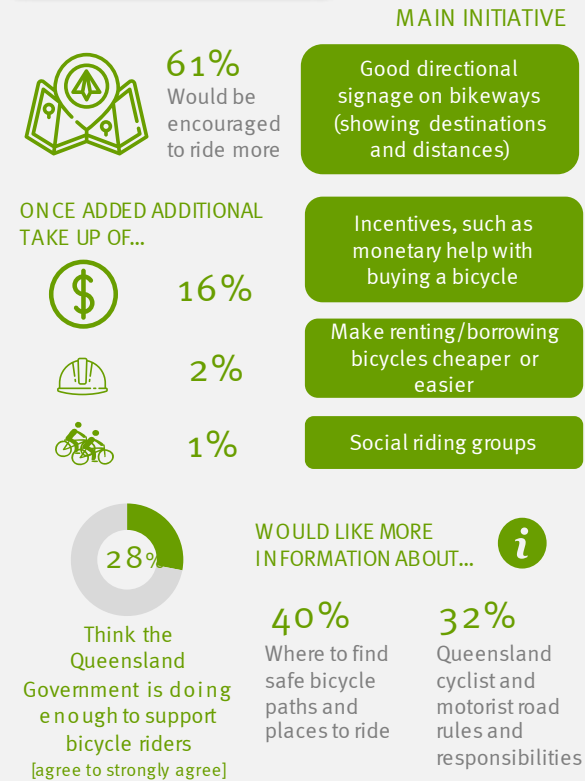
BEHAVIOURS



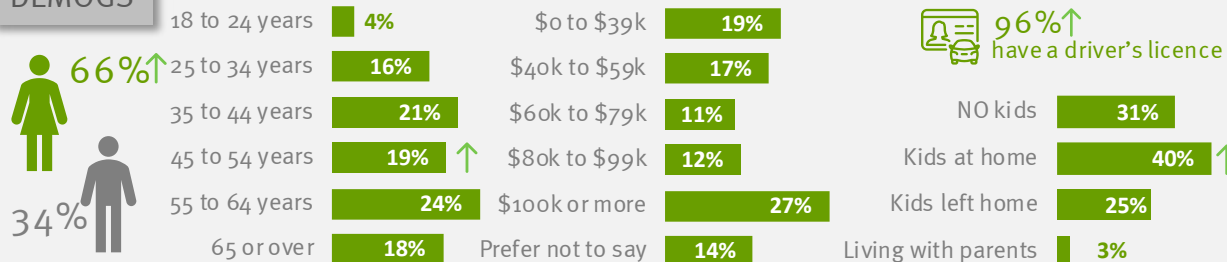
ATTITUDES

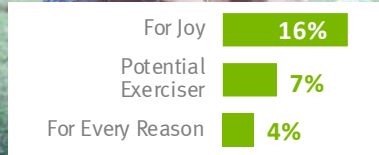
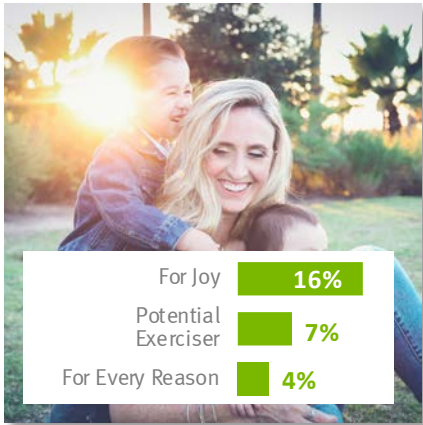


ENCOURAGEMENT



DEMOGS



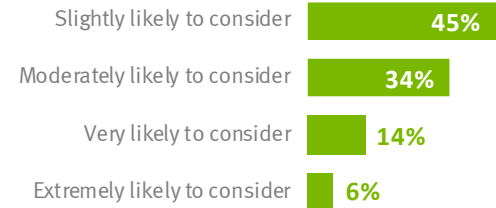
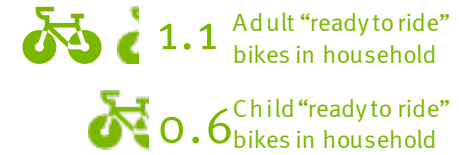


Sarah, 48 POTENTIAL RIDER (CONSIDERER)

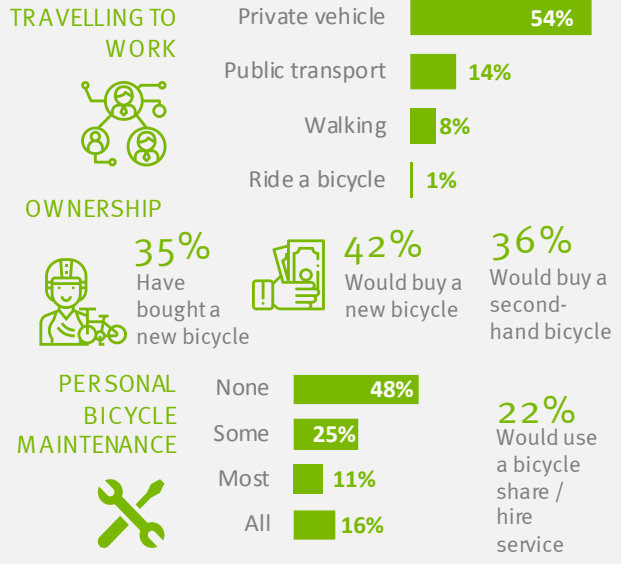
27%
of Qld pop

"I don't currently ride a bike, the last time was probably about five years ago. I'd consider taking it up again, as a way to have some fun with the kids. Although, I'd need to look into safe areas for us to ride."

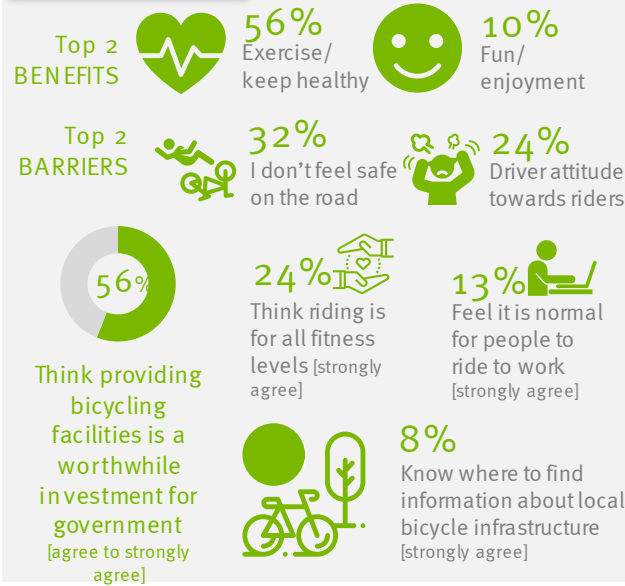
The Considerer group as a whole are most reflective of the Considerer For Joy segment. Some already own a bike, while others would consider buying a new or second hand. They are likely to ride for recreation, fun and enjoyment. They perceive safety and road rage as barriers to riding. There is an opportunity to encourage this segment by providing good directional signage on bikeways.



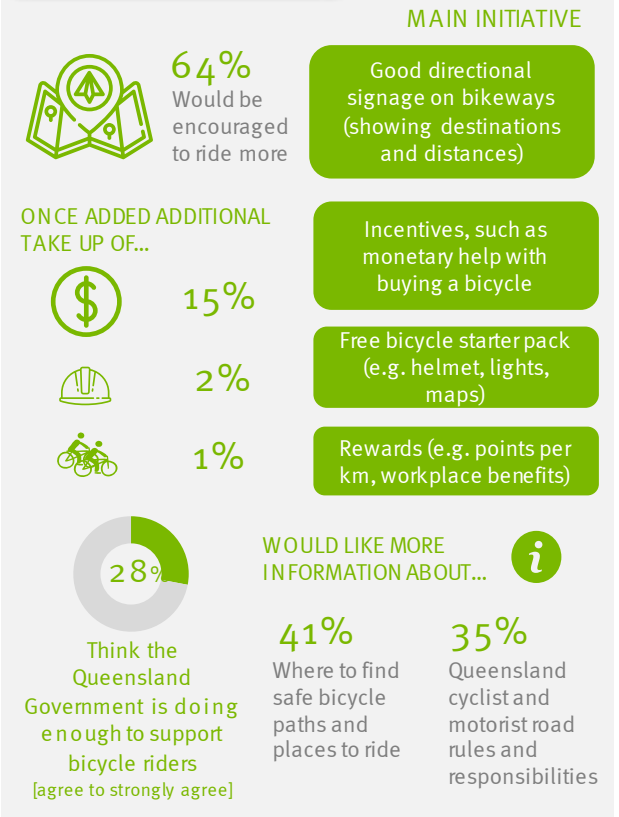
BEHAVIOURS



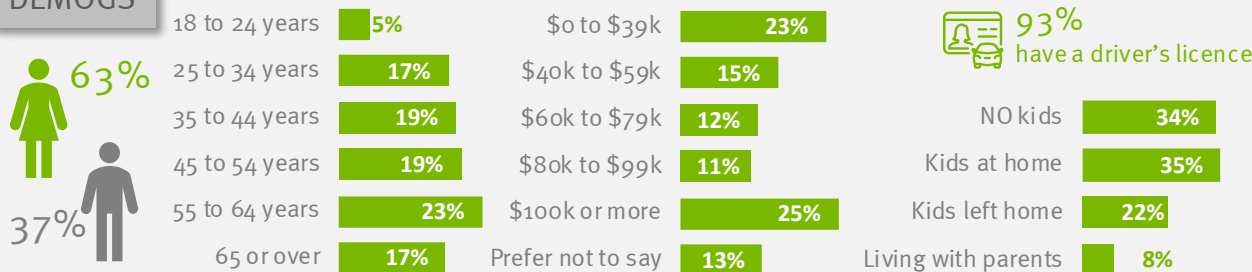
ATTITUDES



ENCOURAGEMENT



DEMOGS





Bette, 65 NEED TO FEEL SAFE

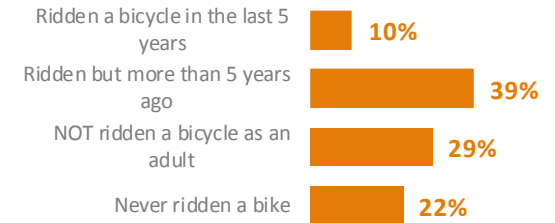
“I don’t currently ride a bike and wouldn’t consider it in the future. Mostly because I wouldn’t feel safe and don’t have the confidence. Plus my daily trips are just too far to considering riding a bike.”

The Need to Feel Safe group reject the idea of cycling in the future mostly for safety reasons. Most did ride as child through, and have fond memories of it. They can see benefits in cycling mostly around exercise and keeping healthy. Around one in five are open to considering riding in the future, if motorist attitudes improved and they felt safer about it.

17%
of Qld pop

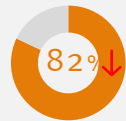
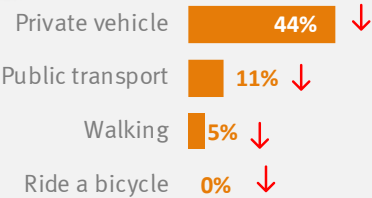


56% Do not own a bike



BEHAVIOURS

TRAVELLING TO WORK



Rode a bike as a child



55% Have fond memories of riding as a child [strongly agree]



53% Felt safe riding as a child [strongly agree]



54% Felt a sense of freedom riding as child [strongly agree]

ATTITUDES

MAIN REASONS FOR NOT CONSIDERING RIDING



21% Don't feel SAFE

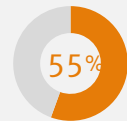


8% Don't feel CONFIDENT



8% Daily trips too far

Top 2 PERCEIVED BENEFITS



Think providing cycling facilities is a worthwhile investment for government [agree to strongly agree]



61%↑ Exercise/keep healthy



10%↑ Environmentally friendly

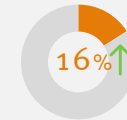


20% Think riding is for all fitness levels [strongly agree]



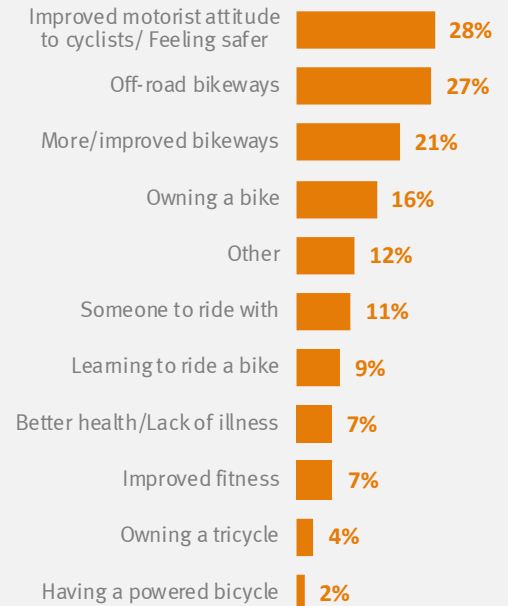
14% Feel it is normal for people to ride to work [strongly agree]

ENCOURAGEMENT



ARE OPEN TO ENCOURAGEMENT State there is something that would encourage them to consider bike riding in the future

OF THOSE, WHAT WOULD ENCOURAGE THEM?



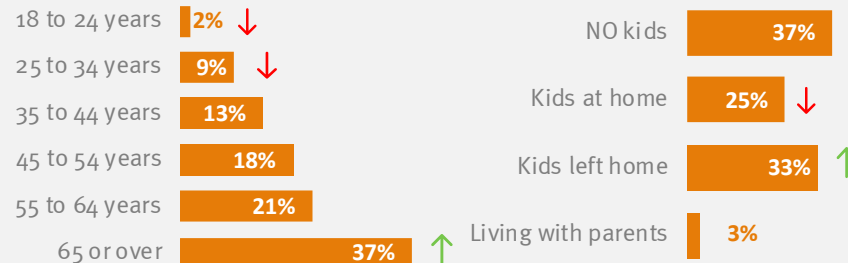
DEMOGS



66%↑



34%





Mary, 50 NEVER RIDER

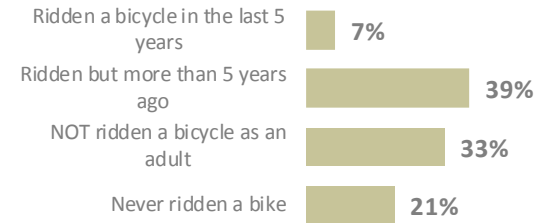
“I don’t currently ride a bike and wouldn’t consider it in the future. Mostly because I have no interest in it and I’m physically unable. Plus, I just dislike bikes and people who ride them.”

The Never Rider group reject the idea of cycling because they no interest and just dislike it. Most did ride as child through, and have fond memories of it. They can see benefits in cycling mostly around exercise and keeping healthy. Around one in ten are open to considering riding in the future, if their health improved.

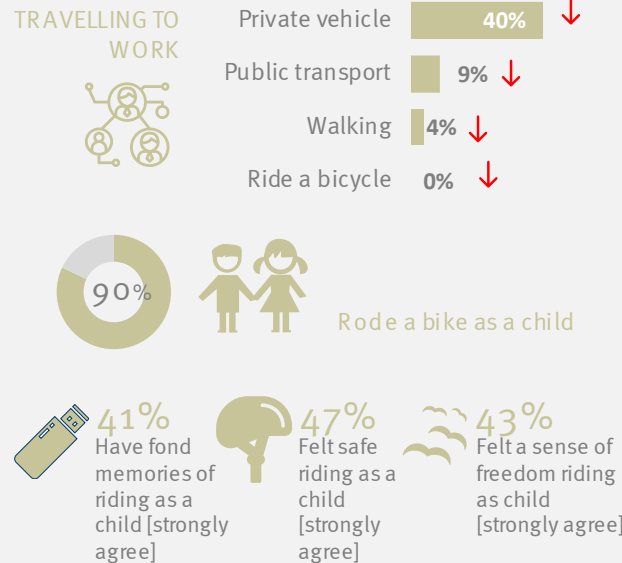
15%
of Qld pop



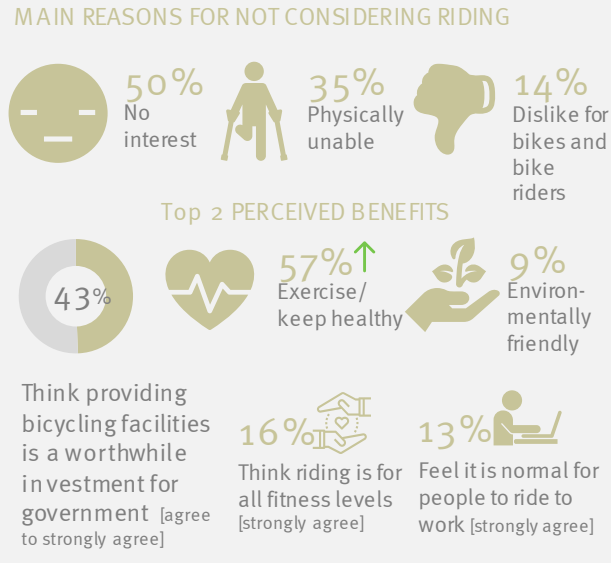
44% Do not own a bike



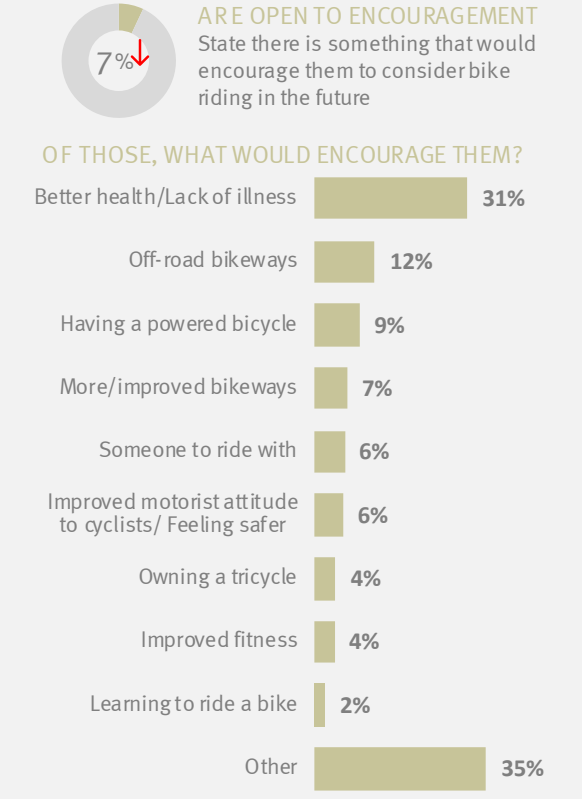
BEHAVIOURS



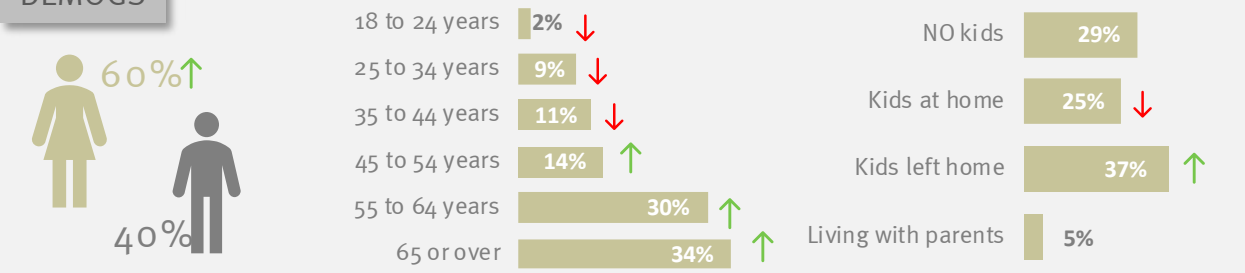
ATTITUDES



ENCOURAGEMENT



DEMOGS



Part 4 - Perceptions of riders

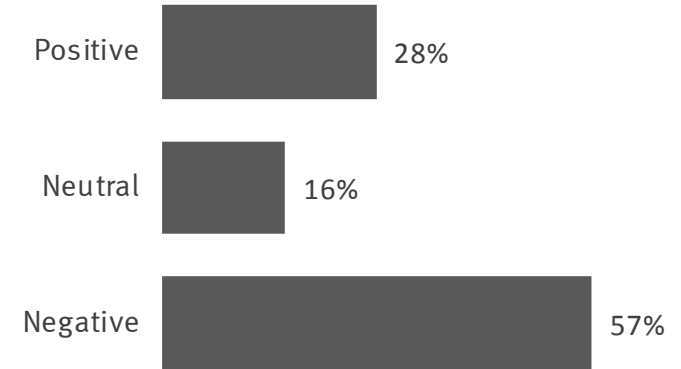
Top of mind thoughts about riders

Attitudes

Top of mind thoughts about “bicycle riders” are mostly negative, even among riders.

Despite this, riders are more likely to be positive compared with considerers and rejecters. Those under 35 are also more likely to be positive compared to other age groups.

Unsurprisingly, rejecters are most likely to be negative. Those above 35 are also more likely to be negative than younger people.



	AGE			TYPE		
	Under 35	35 to 54	55+	Current Riders	Considerers	Rejecters
Positive	33%	25%	27%	38%	27%	17%
Neutral	18%	16%	15%	18%	17%	14%
Negative	50%	60%	60%	47%	57%	70%

Base: All respondents (n=3558; Under 35 n=775, 35 to 54 n=1280, 55+ n=1503; Current Riders n=1509, Considerers n=894, Rejecters n=1155)

A2 What is the first thing that comes to mind when you think of bicycle riders?

Top of mind thoughts about riders

By segments

When looking at segments, Every Reason Riders are the most likely to be positive, with Considerers (excluding Potential Exercisers) and Rejecters being the least likely to be positive.

Despite their current riding behaviour and potential to consider riding in the future, Joy Riders, Every Reason Considerers and Considerers for Joy are the most likely to have negative associations. Both Rejecters are also more likely to have negative associations.

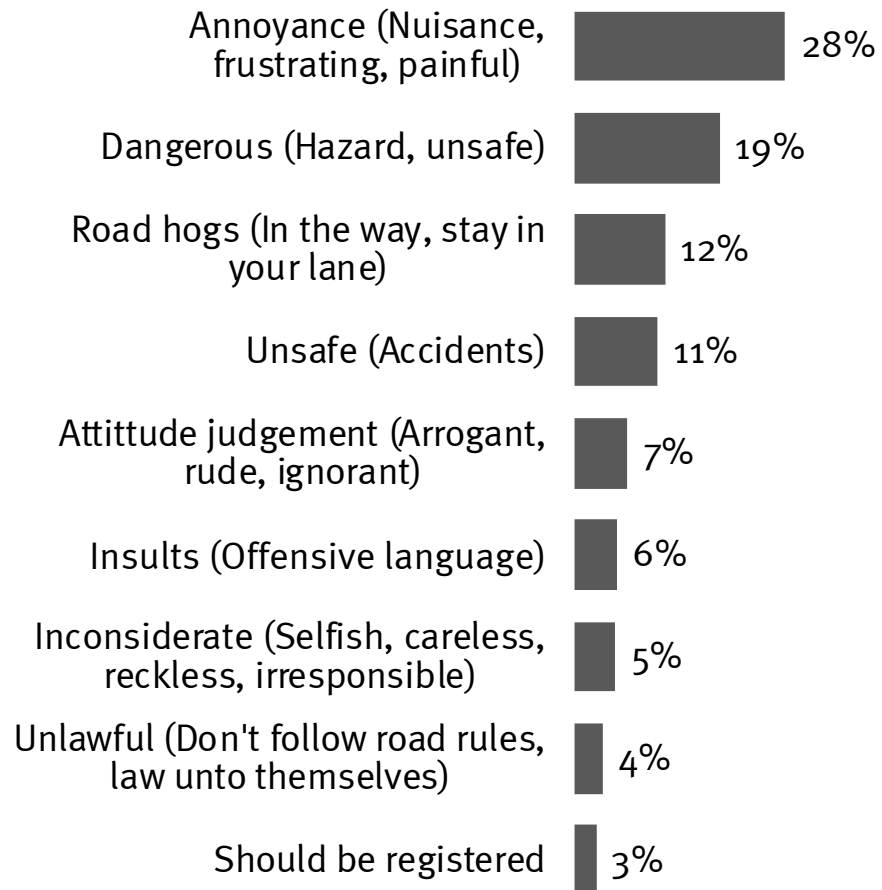
	Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy	Need To Feel Safe	Never Riders
Positive	41%	39%	35%	25%	35%	27%	19%	14%
Neutral	22%	14%	14%	16%	15%	17%	15%	13%
Negative	39%	49%	53%	59%	50%	57%	67%	74%

Base: All respondents (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551, Need to Feel Safe n=611, Never Riders n=544)

A2 What is the first thing that comes to mind when you think of bicycle riders?

Top of mind thoughts about riders - negatives

Overall, when considering negative associations over one in four express annoyance due to riders being perceived as a nuisance or due to the general frustration they cause to drivers. One in five associate riders with danger as they perceive them to be a hazard to others. Few (3%) express the sentiment that riders should be registered to be able to ride on the road.



“A hazard on the road/safety issue.”
“Accident waiting to happen.”

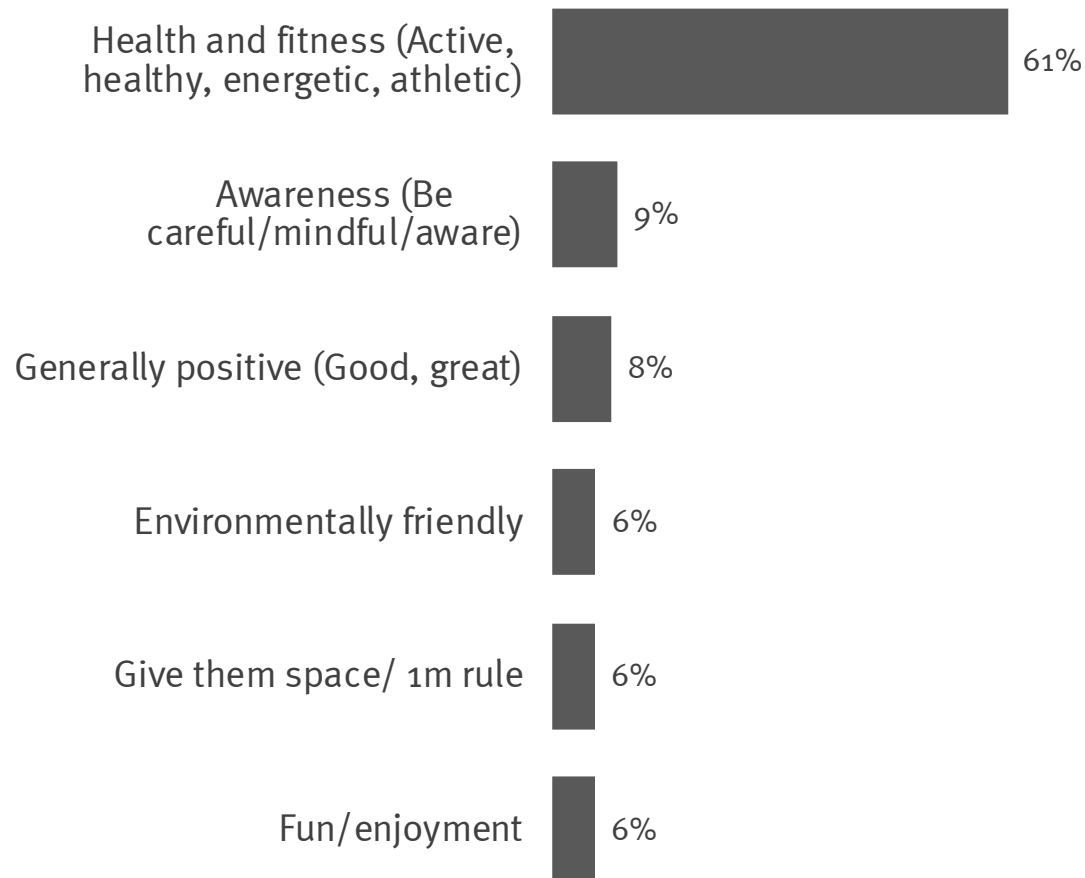
“Annoying”
“Pesky. They take up SO much space on the road.”
“Irresponsible and arrogant”
“Absolute Nuisance, And I ride.”
“Why have they got right of way when we pay the rego?”

Base: Respondents who mentioned negative comments (n=1986)

A2 What is the first thing that comes to mind when you think of bicycle riders?

Top of mind thoughts about riders - positives

Overall, when considering positive associations over three in five associate health and fitness with riders. They are perceived to be fit individuals and are admired by some for this. Some others (9%) also think of the need to be careful when driving around riders to ensure their safety.



“Be careful as the rider could move into your path.”
“Be careful, respect them and drive by road rules.”

“Fit healthy people”
“Healthy and helping the environment.”
“Healthy people but annoying on the road.”
“Active fit enjoying the journey.”

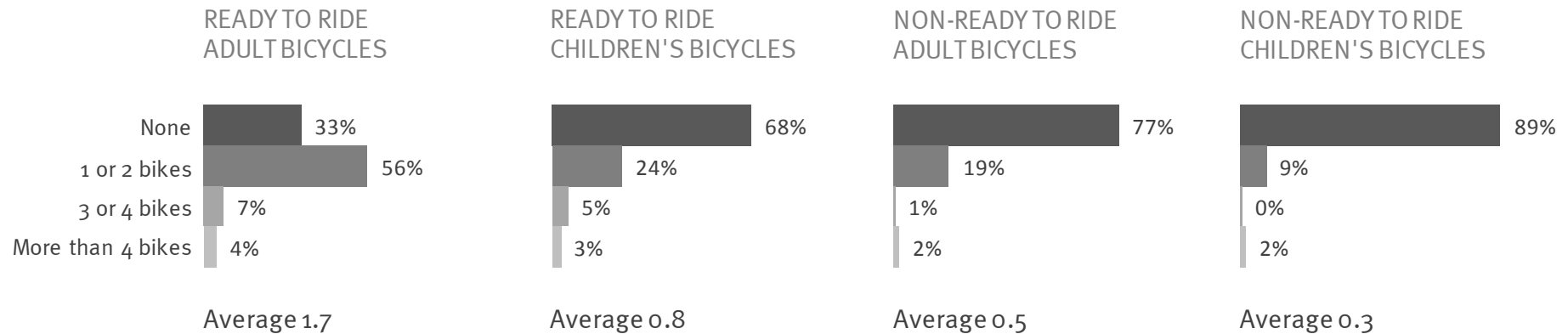
Base: Respondents who mentioned positive comments (n=947)

A2 What is the first thing that comes to mind when you think of bicycle riders?

Part 5 - Bicycle ownership

Bicycles per household

Overall, over half of participants have 1 or 2 ready to ride adult bikes in their household. While around one in five have a ready to ride children's bike, over two in three have no bikes in their household. Few have any number of non-ready to ride adult (23%) and children's (11%) bike, suggesting most bikes are kept functional. Current riders, under 35s and those living in ROQ are likely to have more ready to ride adult bikes. Current riders, under 54s and those living in ROQ are also likely to have more ready to ride children's bikes.



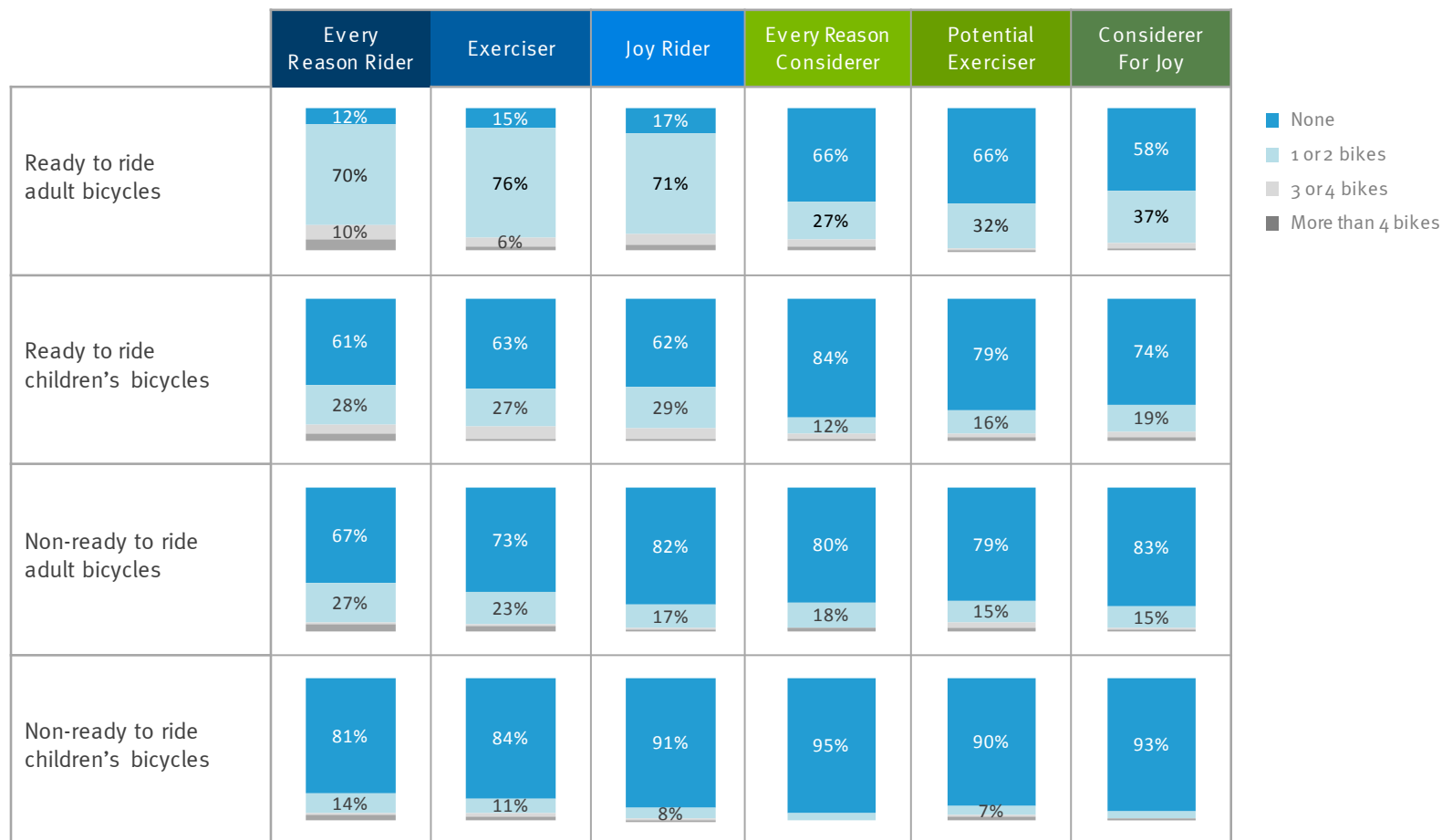
AVERAGE NUMBER PER HOUSEHOLD	AGE			REGION		TYPE		
	Under 35	35 to 54	55+	SEQ	ROQ	Current Riders	Considerers	Stakeholders
Ready to ride adult bicycles	2.0	1.5	1.2	1.5	2.1	2.0	1.1	3.9
Ready to ride children's bicycles	1.1	1.0	0.2	0.7	1.2	1.0	0.6	0.8
Non-ready to ride adult bicycles	0.8	0.4	0.2	0.4	0.7	0.5	0.5	0.6
Non-ready to ride children's bicycles	0.6	0.2	0.2	0.3	0.6	0.4	0.2	0.1

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894; Stakeholders n=788)
 QB1 How many bicycles are there in your household?

Bicycles per household

By segments

Over seven in ten Riders have one or two ready to ride adult bikes in their household, with Exercisers having the most. While Riders also have more ready to ride children’s bikes than Considerers, only two in five (Every Reason 39%, Exerciser 37%, Joy Rider 38%) have more than one bike. Around six in ten Considerers have no ready to ride adult bikes, with Every Reason Considerers and Potential Exercisers having the least (66%).



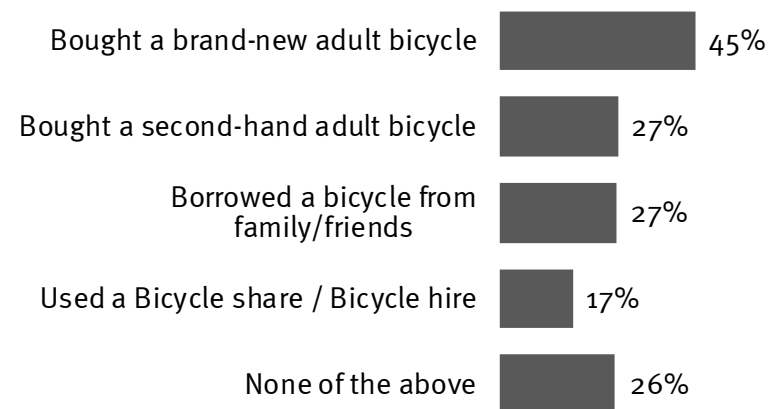
Base: Respondents who currently ride or are considering riding (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551)
 QB1 How many bicycles are there in your household?

Past bicycle usage

Seven in ten have bought a new (45%) or second hand (27%) adult bicycle in the past. Over one in four have borrowed a bicycle, and fewer still have used a bicycle share/hire service (17%).

While one in four have done none of the above, Considerers, females and those above 35 are more likely to have done this.

Males, Current Riders and those above 35 are more likely to have bought a brand-new adult bicycle. While a similar but younger profile are likely to have borrowed a bicycle or used a bicycle sharing service – Under 35, male, Current Rider.



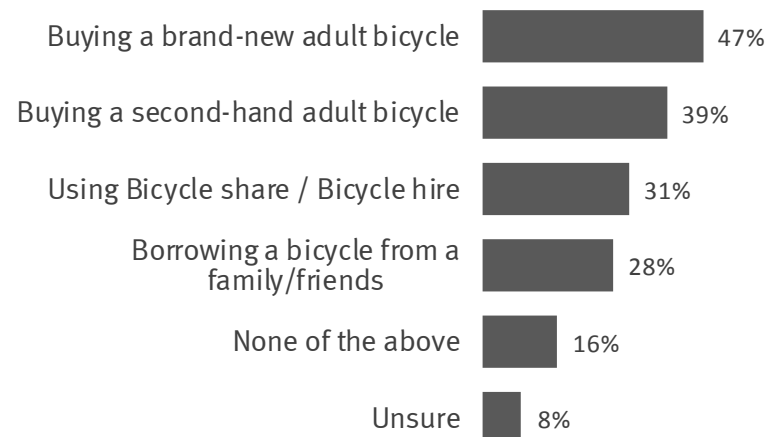
	AGE			GENDER		TYPE		Stakeholders
	Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	
Bought a brand-new adult bicycle	39%	50%	46%	49%	39%	51%	35%	86%
Bought a second-hand adult bicycle	31%	26%	22%	28%	26%	33%	18%	56%
Borrowed a bicycle from family/friends	38%	21%	16%	29%	24%	32%	19%	36%
Used a Bicycle share / Bicycle hire	27%	12%	6%	19%	14%	23%	7%	31%
None of the above	20%	28%	34%	23%	30%	17%	40%	4%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=997, Female n=1410; Current Riders n=1509, Considerers n=894; Stakeholders n=788)
 QB2 Have you done any of the following in the past?

Future bicycle usage

In the future, over four in five would consider buying a brand-new (47%) or second hand adult bike (39%). As few (16%) individuals are unlikely to consider any option, future potential for bike uptake is high.

While young people are more likely to be open to any option, so too are Current Riders. Males, those under 54 and Current Riders are more likely to be open to buying a brand-new adult bike.



	AGE			GENDER		TYPE		Stakeholders
	Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	
Buying a brand-new adult bicycle	52%	53%	31%	50%	43%	50%	42%	87%
Buying a second-hand adult bicycle	47%	37%	29%	40%	39%	41%	36%	60%
Borrowing a bicycle from a family/friends	39%	30%	19%	32%	30%	38%	22%	42%
Using Bicycle share / Bicycle hire	37%	24%	18%	29%	27%	33%	20%	53%
None of the above	10%	14%	28%	16%	16%	14%	18%	4%
Unsure	4%	10%	13%	6%	10%	6%	12%	2%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=997, Female n=1410; Current Riders n=1509, Considerers n=894; Stakeholders n=788)
 QB2 Have you done any of the following in the past?

Past and future bicycle usage

By segments

In the past, Every Reason Riders are the most likely to have used any option. In particular, Every Reason Riders and Joy Riders are the most likely to have bought a brand-new adult bike. Considerers are more likely to have done none of the above, in particular they are least likely to have bought a brand-new or second-hand adult bike.

In the future, Every Reason Riders are again the most likely to consider using any option. While Considerers (Potential Exercisers and Considerers for Joy) remain the least likely to buy a brand-new adult bike, borrow a bike or use a bike sharing service, Every Reason Considerers are likely to buy a second-hand adult bike.

PAST BICYCLE USE		Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy
Bought a brand-new adult bicycle		52%	48%	50%	34%	34%	36%
Bought a second-hand adult bicycle		40%	28%	27%	20%	9%	19%
Borrowed a bicycle from family/friends		43%	29%	22%	33%	10%	15%
Used a Bicycle share / Bicycle hire		34%	14%	15%	10%	5%	6%
None of the above		10%	18%	23%	35%	50%	41%
FUTURE BICYCLE USE		Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy
Buying a brand-new adult bicycle		57%	42%	46%	54%	32%	38%
Buying a second-hand adult bicycle		49%	43%	34%	50%	14%	36%
Borrowing a bicycle from a family/friends		41%	25%	26%	30%	9%	19%
Using Bicycle share / Bicycle hire		50%	18%	30%	33%	9%	19%
None of the above		8%	16%	20%	6%	32%	21%
Unsure		3%	10%	8%	7%	17%	13%

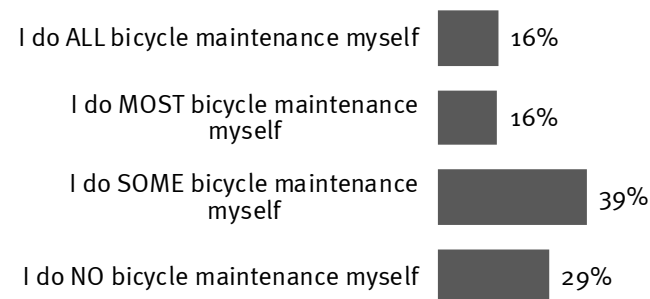
Base: Respondents who currently ride or are considering riding (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551)

QB2 Have you done any of the following in the past? QB3 Would you consider doing any of the following in the future?

Bicycle maintenance

Less than one in three do most or all bicycle maintenance themselves. Around two in five do some bicycle maintenance themselves, in particular males and Current Riders.

Three in ten do no bicycle maintenance themselves, these people are more likely to be females and Considerers, suggesting potential knowledge gaps for these individuals.



	AGE			GENDER		TYPE		Stakeholders
	Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	
I do ALL bicycle maintenance myself	13%	13%	24%	22%	8%	15%	16%	14%
I do MOST bicycle maintenance myself	16%	18%	16%	23%	9%	19%	11%	36%
I do SOME bicycle maintenance myself	41%	40%	35%	42%	36%	45%	25%	45%
I do NO bicycle maintenance myself	30%	30%	25%	14%	47%	21%	48%	6%

Base: Respondents who have a bike at home (n=1901; Under 35 n=539, 35 to 54 n=792, 55+ n=570; Male n=766, Female n=1134; Current Riders n=1391, Considerers n=510, Stakeholders n=794)

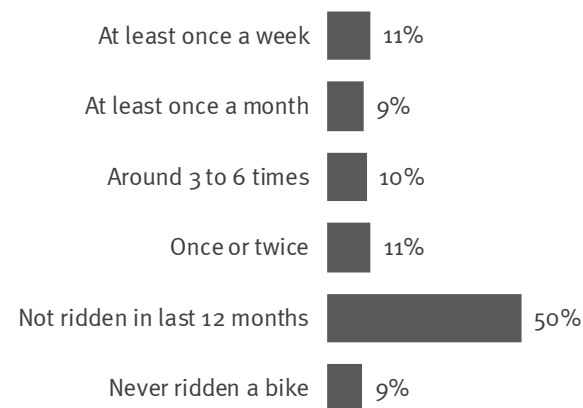
QB4 When it comes to doing maintenance on bicycles in your household, which of the following statements apply?

Part 6 - Riding behaviour

Riding frequency

In the past 12 months, riding frequency varies, with one in five riding at least once a week to one a month (20%). Further, few have ridden 3 to 6 times (10%) or once or twice (11%). Males and those under 35 are more likely to have ridden at least once to 3-6 times compared with females and those above 35.

Over half (50%) have not ridden in the past twelve months. Those above 55, females and those living in ROQ are more likely to have not ridden in the past 12 months compared with those below 54, males and those living in SEQ. While few (9%) have never ridden a bike, females and those above 55 are more likely to have never done this.



	AGE			GENDER		REGION		TYPE			Stakeholders
	Under 35	35 to 54	55+	Male	Female	SEQ	ROQ	Current Riders	Considerers	Rejecters	
At least once a week	16%	12%	6%	15%	7%	11%	11%	26%	0%	0%	84%
At least once a month	16%	9%	4%	12%	7%	10%	8%	23%	0%	0%	8%
Around 3 to 6 times	15%	9%	5%	11%	8%	10%	9%	24%	0%	0%	6%
Once or twice	12%	13%	8%	11%	11%	12%	9%	27%	0%	0%	1%
Not ridden in last 12 months	37%	49%	64%	46%	55%	48%	55%	0%	94%	79%	1%
Never ridden a bike	4%	8%	13%	5%	12%	9%	8%	0%	6%	21%	0%

Base: All respondents (n=3558; Under 35 n=775, 35 to 54 n=1280, 55+ n=1503; Male n=1416, Female n=2141; SEQ n=2667, ROQ n=891; Current Riders n=1509, Considerers n=894, Rejecters n=1155; Stakeholders n=794)
 QA3 How often have you ridden a bicycle in the past 12 months for any reason?

Riding frequency

By segments

Given the fact that segments were portioned based on their riding frequency, it is unsurprising that Riders are more likely to ride than Considerers or Rejecters. Within riders, Every Reason Riders report higher rates of riding at least once per week or once per month, followed by Exercisers and Joy Riders.

In comparison to Every Reason Considerers, Potential Exercisers and Considerers for Joy report higher rates of not having ridden in the past 12 months. Although Rejecters are most likely to have never ridden a bike, only one in five report this, suggesting that four in five Rejecters have ridden in the past.

	Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy	Need To Feel Safe	Never Riders
At least once a week	39%	27%	15%	0%	0%	0%	0%	0%
At least once a month	25%	21%	20%	0%	0%	0%	0%	0%
Around 3 to 6 times	21%	19%	28%	0%	0%	0%	0%	0%
Once or twice	15%	33%	37%	0%	0%	0%	0%	0%
Not ridden in last 12 months	0%	0%	0%	92%	96%	95%	78%	79%
Never ridden a bike	0%	0%	0%	8%	4%	5%	22%	21%

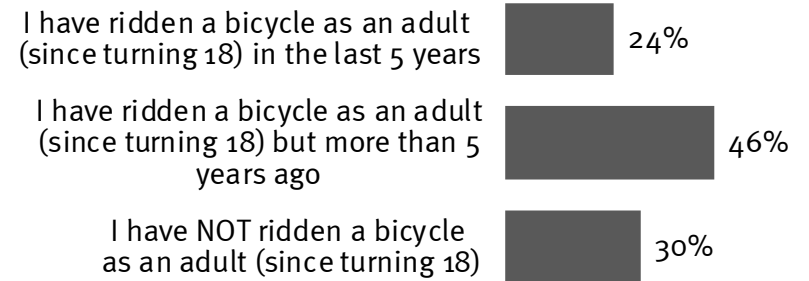
Base: All respondents (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551, Need to Feel Safe n=611, Never Riders n=544) A3 How often have you ridden a bicycle in the past 12 months for any reason?

Non-current riders

Of those who have ridden a bike but not in the past 12 months, seven in ten have ridden a bike as an adult, with around half having done so over five years ago (46%), and one in four (24%) having done so in the last five years. Three in ten have not ridden a bike as an adult.

Considerers and those under 54 are more likely to have ridden a bike in the last five years, suggesting that younger people and those partial to ride are more active. Males and those above 35 are more likely to have ridden a bike as an adult although not in the past 5 years.

Rejecters are more likely than Considerers to have ridden a bike as an adult (more than five years ago) and to have never ridden a bike as an adult. This suggests that while half of rejecters have not ridden since childhood, half have, but have lapsed in the last five years.



	AGE			GENDER		TYPE	
	Under 35	35 to 54	55+	Male	Female	Considerers	Rejecters
I have ridden a bicycle as an adult in the last 5 years	33%	29%	16%	25%	23%	37%	11%
I have ridden a bicycle as an adult but this was more than 5 years ago	29%	46%	56%	50%	43%	43%	49%
I have NOT ridden a bicycle as an adult	38%	25%	28%	25%	34%	20%	40%

Base: All respondents (n=3558; Under 35 n=775, 35 to 54 n=1280, 55+ n=1503; Male n=1416, Female n=2141; SEQ n=2667, ROQ n=891; Current Riders n=1509, Considerers n=894, Rejecters n=1155; Stakeholders n=794)
 QA3 How often have you ridden a bicycle in the past 12 months for any reason?

Non-current riders

By segments

Every Reason Riders and Considerers for Joy are the most likely to have ridden a bike as an adult in the last five years. Both Rejecters are less likely to have done this, and are the most likely to have not ridden a bike as an adult. Riders and Considerers are fairly similar when it comes to those who have ridden as an adult but not in the last five years, although Considerers for Joy are less likely to report this.

	Every Reason Considerer	Potential Exerciser	Considerer For Joy	Need To Feel Safe	Never Riders
I have ridden a bicycle as an adult in the last 5 years	36%	27%	40%	12%	9%
I have ridden a bicycle as an adult but this was more than 5 years ago	45%	46%	41%	50%	49%
I have NOT ridden a bicycle as an adult	19%	27%	19%	38%	42%

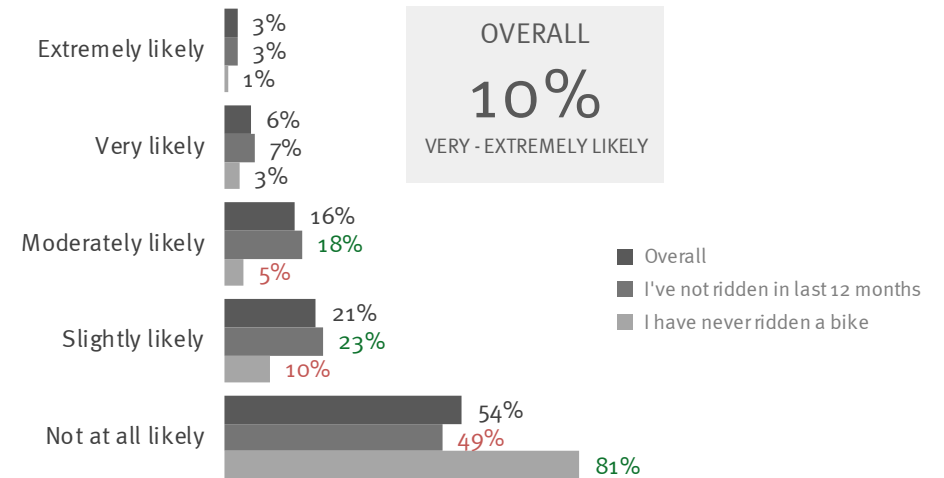
Base: Respondents who have ridden a bike but not in the past 12 months (Every Reason Considerer n=202, Potential Exerciser n= 122, Considerer for Joy n= 517, Need to Feel Safe n=472, Never Riders n=428) QA4 Which of the following best describes you?

Likelihood to Consider Riding

Overall, of those who have never ridden a bike and who have but have not done so in the last five years, one in ten are likely to very likely to consider riding in the future.

Overall, around four in ten are moderately to slightly likely to consider riding in the future (37%), suggesting that likelihood to consider is conservative. Those who have ridden in the last five years rate these options higher than those who have never ridden before.

Those who have never ridden a bike are more likely to not consider riding in the future, suggesting that this behaviour is likely to persist.



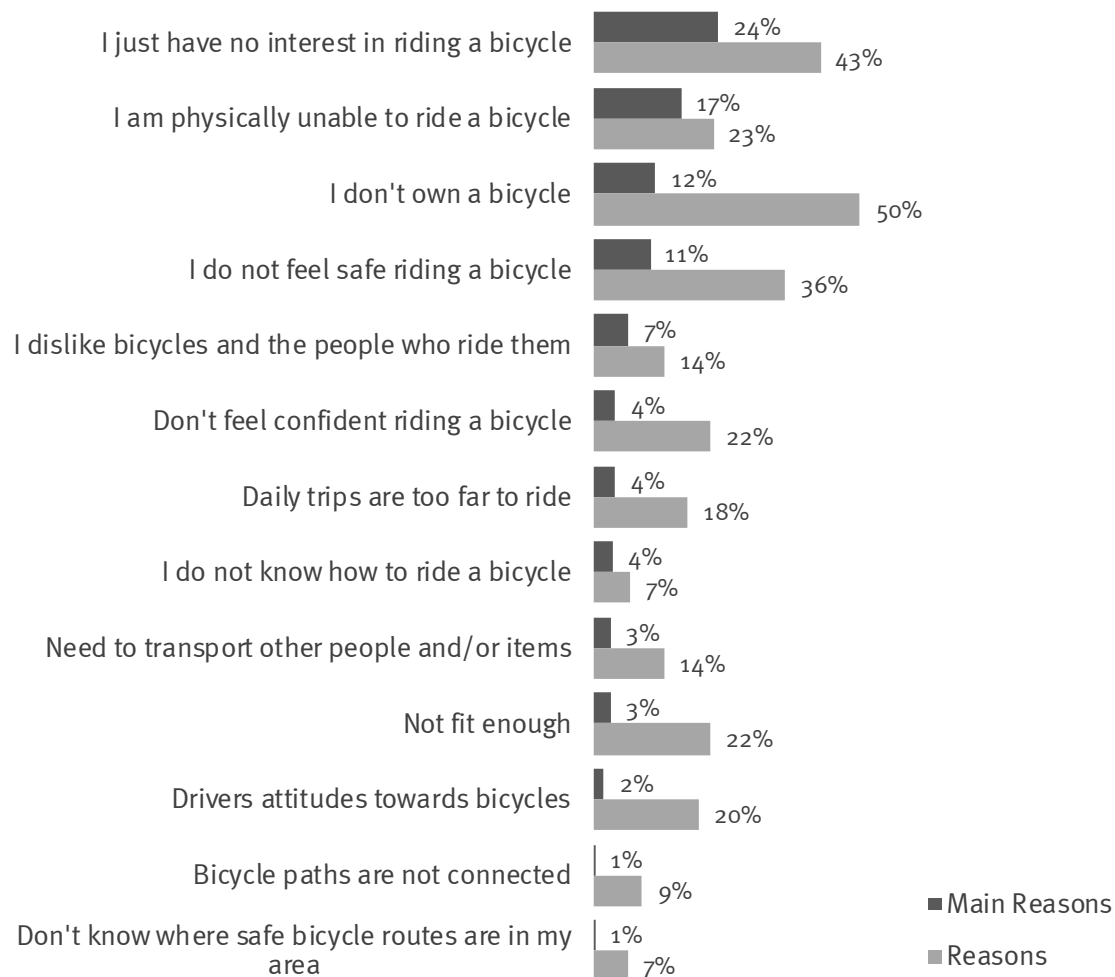
	AGE			GENDER	
	Under 35	35 to 54	55+	Male	Female
Extremely likely	4%	3%	2%	4%	2%
Very likely	12%	7%	3%	8%	6%
Moderately likely	22%	19%	11%	18%	14%
Slightly likely	26%	22%	18%	18%	23%
Not at all likely	36%	49%	66%	52%	55%

Base: Respondents who have not ridden in the past 12 months or have never ridden a bike (n= 2049; Under 35 n=323, 35 to 54 n=666, 55+ n=1060; Male n=752, Female n=1057) QA5 How likely are you to consider riding a bicycle in the future?

Reasons for not riding

Of those unlikely to consider riding in the future, the main reason is simply that they have no interest in riding a bike (24%). Physical inability to ride (17%), not owning a bike (12%) and safety concerns (11%) are other reasons mentioned.

While lack of interest and physical inability will be difficult to address, improved access to a bike and safety self-efficacy may overcome reasons not to ride.



Base: Respondents who are unlikely to consider riding in the future (n=1155) QA5a Why are you unlikely to consider riding a bicycle in the future? QA5b What is the MAIN reason?

Reasons for not riding

By demographics

In comparison to younger individuals, those above 35 are more likely to not ride due to not owning a bike, safety concerns, physical inability and driver attitudes towards riders. Those above 55 are more likely to be concerned with their fitness than younger individuals. In comparison to males and those from ROQ, females and those from SEQ are also more likely to not ride due to safety concerns and lack of confidence.

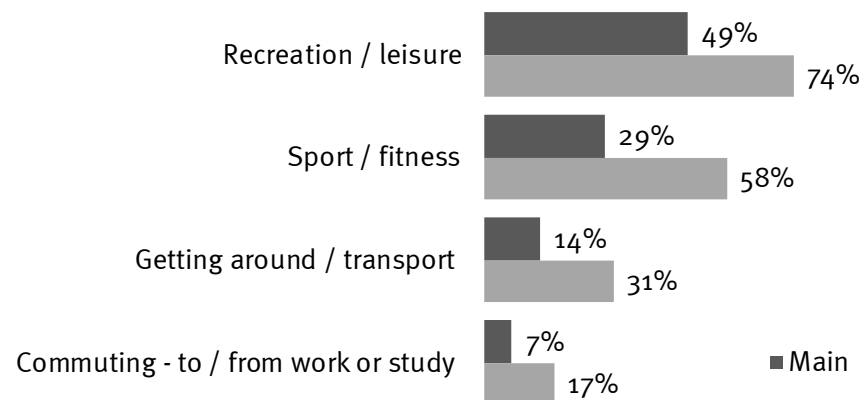
	AGE			GENDER		REGION	
	Under 35	35 to 54	55+	Male	Female	SEQ	ROQ
I don't own a bicycle	28%	47%	59%	47%	53%	52%	47%
I just have no interest in riding a bicycle	44%	37%	46%	42%	44%	43%	42%
I do not feel safe riding a bicycle	21%	37%	41%	31%	40%	39%	31%
I am physically unable to ride a bicycle	7%	16%	31%	22%	24%	24%	21%
Don't feel confident riding a bicycle	17%	20%	25%	13%	29%	25%	17%
Not fit enough	14%	18%	27%	20%	24%	25%	17%
Drivers attitudes towards bicycles	12%	24%	20%	23%	18%	19%	21%
Daily trips are too far to ride	21%	23%	15%	16%	19%	19%	16%
I dislike bicycles and the people who ride them	27%	14%	9%	18%	10%	14%	12%
Need to transport other people and/or items	24%	16%	9%	14%	13%	14%	12%
The weather/climate	11%	14%	10%	11%	12%	12%	11%
Bicycle paths are not connected	13%	12%	7%	10%	9%	9%	9%
I do not know how to ride a bicycle	5%	5%	9%	2%	11%	7%	7%
Don't know where safe bicycle routes are in my area	6%	8%	6%	7%	7%	7%	6%
Don't have enough time	11%	8%	3%	5%	6%	7%	4%
Don't have anyone to ride with	5%	6%	6%	5%	6%	5%	6%
Cost too much money	1%	5%	4%	5%	3%	4%	3%

Base: Respondents who are unlikely to consider riding in the future (Under 35 n=123, 35 to 54 n=327, 55+ n=705; Male n=422, Female n=733; SEQ n=855, ROQ n=300) QA5a Why are you unlikely to consider riding a bicycle in the future?

Reasons for riding a bike

Of those who currently ride or would consider riding, half cite recreation and leisure as their main reason. Three in ten then cite sport and fitness. Females and those above 35 are more likely to ride for leisure, while those 35-54 are more likely to ride for sport or fitness compared to younger individuals.

Riding for transport and commuting to work are less common reasons cited. Males and those under 35 are more likely to ride for transport, while males and those below 54 are more likely to ride to commute. Considerers are more likely to ride for leisure than Current Riders. They are also less likely to ride for transport and commuting. This suggests Considerers are most likely to be converted to riding via leisure rather than transport and commuting.



MAIN REASON FOR RIDING

	AGE			GENDER		TYPE		
	Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	Stakeholders
Recreation / leisure	40%	52%	58%	43%	54%	46%	52%	20%
Sport / fitness	26%	32%	31%	30%	28%	28%	31%	52%
Getting around / transport	21%	9%	8%	16%	12%	16%	11%	5%
Commuting - to and from work	12%	4%	1%	9%	4%	9%	3%	21%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=994, Female n=1408; Current Riders n=1509, Considerers n=894; Stakeholders n=788)

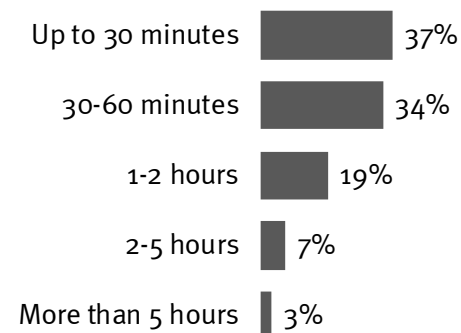
QC1 What are all the reasons you ride a bicycle? QC2 Main reason for riding a bicycle?

Time spend riding per week

Of those who currently ride, most spend up to 60 minutes riding per week, with 37% spending up to 30 minutes and 34% riding for 30-60 minutes.

In comparison to males and younger individuals, females and those 35-54 are more likely to spend up to 30 minutes riding.

While one in five spend 1-2 hours riding, few (10%) spend over two hours riding. In comparison to younger individuals, those above 35 are more likely to spend more than five hours riding per week.



	AGE			GENDER		Stakeholders
	Under 35	35 to 54	55+	Male	Female	
Up to 30 minutes	33%	42%	38%	32%	44%	3%
30-60 minutes	35%	32%	35%	36%	31%	7%
1-2 hours	23%	16%	16%	21%	17%	11%
2-5 hours	8%	6%	7%	7%	6%	31%
More than 5 hours	1%	4%	4%	2%	3%	47%

Base: Respondents who currently ride (n=1509; Under 35 =452, 35-54 = 614, 55+ =443; Male n=664; Female n=845; Stakeholders n=782)

QC3 In a typical week that you ride a bicycle, how long would you spend riding?

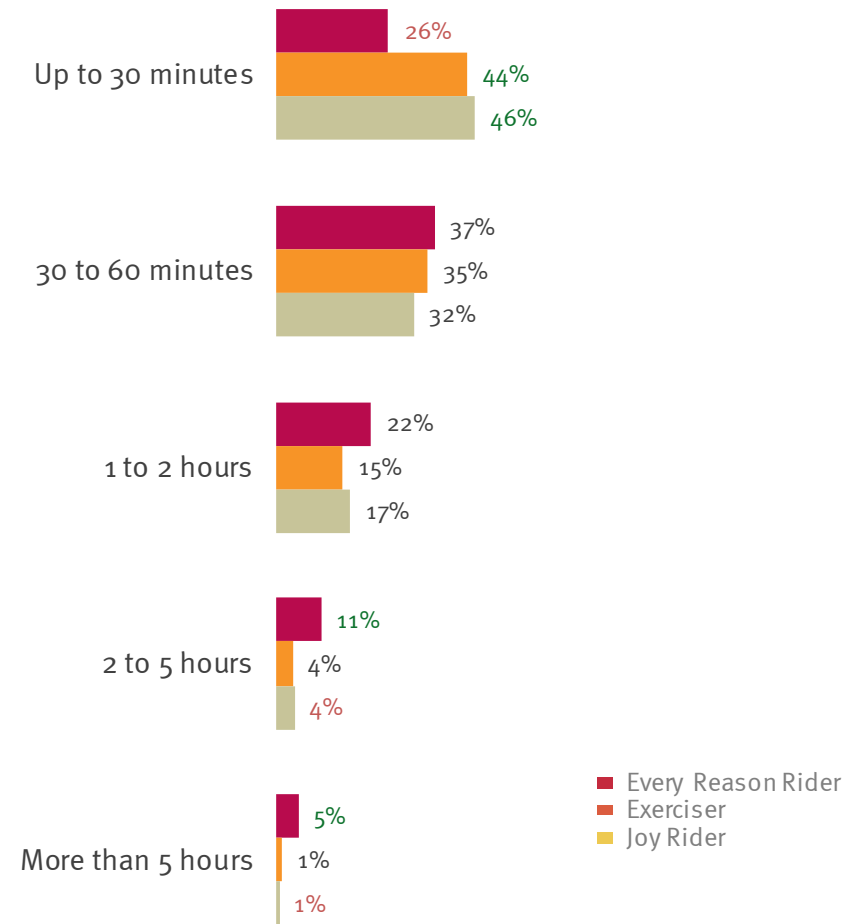
Time spend riding per week

By segments

Of riders, Exercisers and Joy Riders are more likely than Every Reason Riders to spend up to 30 minutes riding each week.

While a similar proportion of Riders spend 30 minutes to two hours riding, Every Reason Riders are more likely than Joy Riders to spend over two hours riding each week.

Given Every Reason Riders ride for transport, commuting, recreation and fitness, it is not surprising that their aggregate time spent riding per week is greater than riders who ride for only one of these reasons.

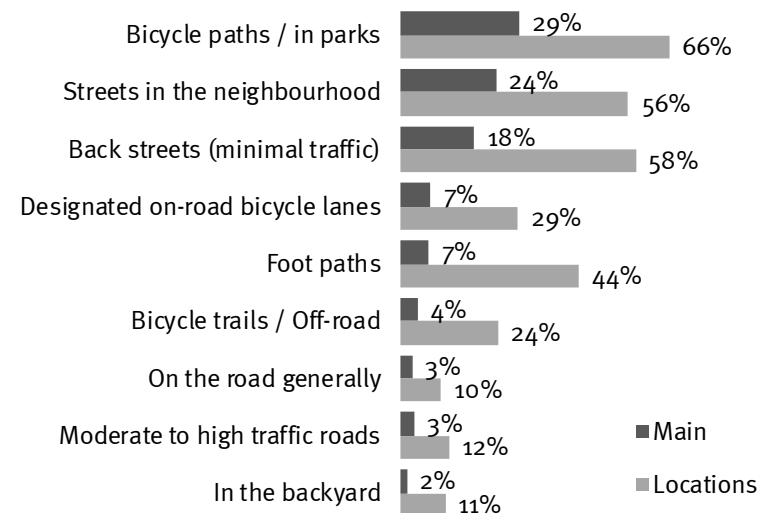


Base: Respondents who currently ride (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824)
QC3 In a typical week that you ride a bicycle, how long would you spend riding?

Riding locations

Of those who currently ride or would consider riding, the main location cited is on bicycle paths and in parks (29%). Those over 35, females and those from SEQ are more likely to prefer this option. Neighbourhood streets (24%) and back streets with minimal traffic (18%) are also cited. Those over 55, females and those from SEQ are more likely to prefer neighbourhood streets. Males and those under 35 are more likely to prefer backstreets.

Considerers are more likely to prefer bicycle paths, and Current Riders are likely to prefer neighbourhood streets. The top three preferred locations suggest individuals (especially Considerers) prefer areas where they can ride sheltered from traffic. Therefore, when converting Considerers, the provision of safe riding locations is important.



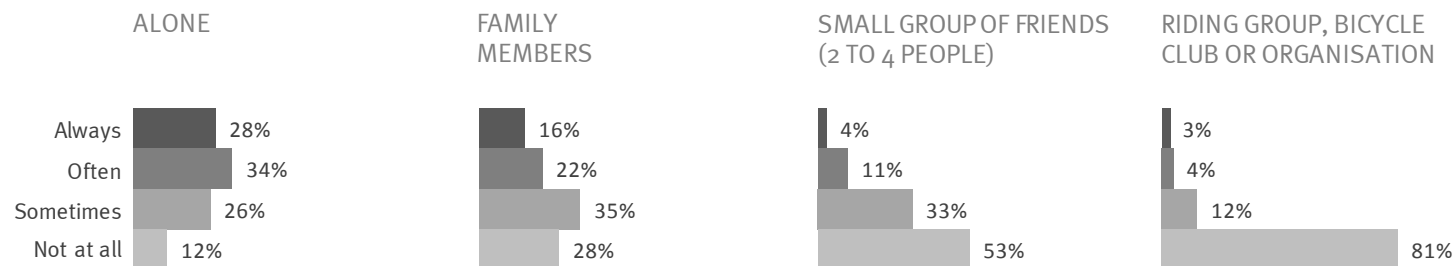
MAIN LOCATION FOR RIDING

	AGE			GENDER		REGION		TYPE		Stakeholders
	Under 35	35 to 54	55+	Male	Female	SEQ	ROQ	Current Riders	Considerers	
Bicycle paths / in parks	24%	32%	34%	25%	35%	33%	21%	23%	38%	15%
Streets in the neighbourhood	21%	24%	27%	24%	23%	22%	28%	26%	19%	4%
Back streets (minimal traffic)	22%	17%	14%	21%	15%	19%	17%	19%	16%	9%
Designated on-road bicycle lanes	10%	6%	5%	9%	5%	7%	8%	8%	6%	14%
Foot paths	8%	7%	5%	5%	9%	6%	9%	7%	7%	1%
Bicycle trails / Off-road	4%	5%	5%	4%	4%	4%	5%	4%	5%	4%
On the road generally	2%	3%	5%	4%	2%	3%	4%	3%	3%	39%
Moderate to high traffic roads	6%	2%	1%	4%	2%	4%	3%	6%	0%	13%
In the backyard	2%	2%	1%	2%	2%	1%	4%	1%	2%	0%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=994, Female n=1408; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894; Stakeholders n=788) QC4 Where do you / would you usually ride?
 QC5 Where do you / would you MAINLY ride?

Riding companions

Overall, of those who currently ride or would consider riding, around three in ten prefer to do it alone and over one in ten prefer to do it with family members. While few ride with a group, those under 35 are more likely to ride in a small group or as part of an organisation.



		AGE			GENDER		TYPE		
		Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	Stakeholders
Alone	Always	28%	26%	32%	35%	20%	30%	26%	13%
	Often	35%	31%	37%	37%	31%	33%	36%	55%
	Sometimes	28%	29%	20%	22%	32%	26%	27%	29%
	Not at all	10%	14%	11%	7%	17%	11%	12%	3%
Family members	Always	14%	19%	14%	11%	21%	16%	15%	5%
	Often	23%	26%	15%	20%	23%	23%	19%	19%
	Sometimes	35%	33%	36%	35%	35%	33%	37%	52%
	Not at all	27%	22%	35%	34%	20%	27%	28%	24%
A small group of friends (2 to 4 people)	Always	6%	2%	2%	4%	3%	4%	3%	3%
	Often	15%	9%	5%	12%	9%	13%	7%	33%
	Sometimes	37%	31%	29%	32%	35%	29%	38%	44%
	Not at all	43%	58%	63%	53%	53%	53%	52%	19%
Riding group, bicycle club or organisation	Always	5%	1%	0%	3%	2%	4%	0%	4%
	Often	7%	2%	1%	4%	4%	6%	1%	28%
	Sometimes	17%	10%	8%	15%	8%	13%	11%	34%
	Not at all	71%	87%	91%	77%	87%	77%	87%	34%

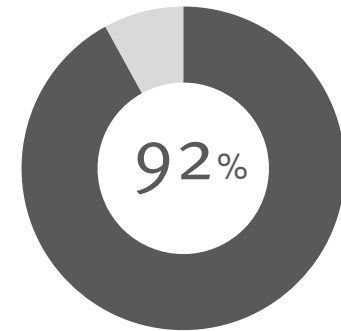
Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=994, Female n=1408; Current Riders n=1509, Considerers n=894; Stakeholders n=788) QC6 Who do you usually / who do you think you would ride with? QC5 Where do you / would you MAINLY ride?

Part 7 - Childhood riding

Childhood riding

Despite current riding behaviour, the majority rode as children. Rejecters, females and those above 55 are the least likely to have ridden as a child, although likelihood of riding is still high within these groups. Those under 54, males, Riders and Considerers are more likely to have ridden as children.

Potential Exercisers and Considerers for Joy are most likely to have ridden as children, with Rejecters least likely. Therefore, when converting Considerers, accessing positive childhood memories may be a useful way to elicit nostalgia.



	AGE			GENDER		TYPE			
	Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	Rejecters	Stakeholders
Rode a bicycle as a child	94%	95%	88%	95%	90%	95%	97%	86%	95%

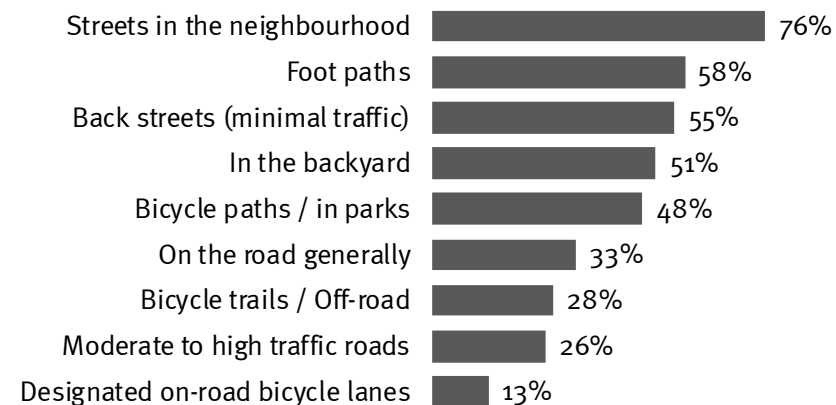
SEGMENTATION							
Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy	Need To Feel Safe	Never Riders
95%	96%	94%	97%	97%	97%	82%	90%

Base: All respondents (n=3558; Under 35 n=775, 35 to 54 n=1280, 55+ n=1503; Male n=1416, Female n=2141; Current Riders n=1509, Considerers n=894, Rejecters n=1155; Stakeholders n=794; Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551, Need To Feel Safe n=611, Never Riders n=544) QD1 Did you ride a bicycle when you were a child?

Childhood riding locations

Of those who rode as children, the most common location is neighbourhood streets, with three in four riding in this location. In comparison to younger participants, those above 35 are more likely to have ridden in neighbourhood streets.

Over half also rode on footpaths (58%), back streets (55%) and in the backyard (51%). Considerers are more likely than Current Riders to have ridden in the backyard and on the road generally. This suggests Considerers have been exposed to a variety of sheltered and non-sheltered riding as children.



	AGE			GENDER		TYPE			Stakeholders
	Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	Rejecters	
Streets in the neighbourhood	70%	83%	75%	76%	75%	76%	76%	75%	78%
Foot paths	58%	64%	51%	59%	56%	60%	57%	54%	53%
Back streets (minimal traffic)	55%	63%	48%	58%	52%	58%	53%	54%	55%
In the backyard	56%	53%	43%	46%	56%	47%	54%	53%	38%
Bicycle paths / in parks	58%	55%	32%	48%	48%	54%	46%	40%	45%
On the road generally	13%	38%	49%	38%	27%	25%	37%	41%	37%
Bicycle trails / Off-road	27%	36%	19%	32%	23%	30%	30%	21%	34%
Moderate to high traffic roads	13%	31%	35%	32%	19%	25%	27%	26%	21%
Designated on-road bicycle lanes	15%	17%	7%	16%	9%	16%	13%	9%	10%

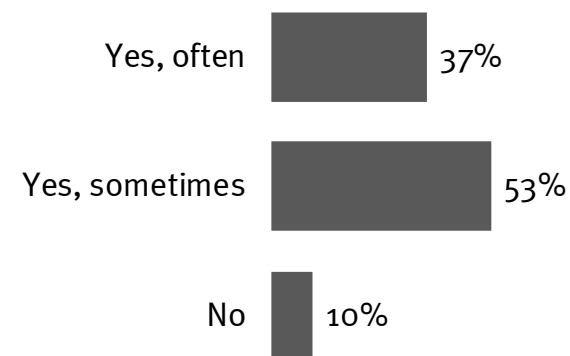
Base: Respondents who rode as a child (n=3246; Under 35 n=730, 35 to 54 n=1199, 55+ n=1317; Male n=1333, Female n=1912; Current Riders n=1453, Considerers n=861, Rejecters n=950; Stakeholders n=755) QD2 Where did you ride as a child?

Have children who ride

The majority of those who currently ride, or are considering, and have children who also ride do so often or sometimes (90%). While over half ride sometimes, one in three ride often.

While all groups are equally likely to have children who ride sometimes, those under 35, and those from ROQ are more likely to have children who ride more frequently. Current Riders are also more likely than Considerers to have children who ride often, suggesting that riding behaviour from parents carries through to children.

Further, Every Reason Riders are also most likely to have children who ride frequently, while Considerers for Joy are the least likely.



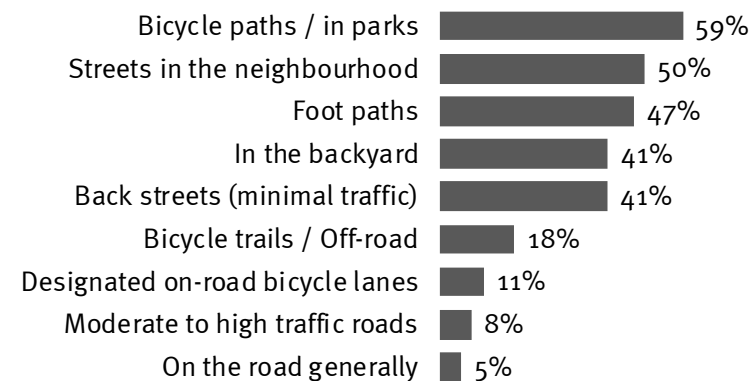
	AGE		REGION		TYPE		Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy	Stakeholders
	Under 35	35 to 54	SEQ	ROQ	Current Riders	Considerers							
Yes, often	44%	34%	35%	43%	43%	25%	50%	43%	38%	26%	22%	25%	38%
Yes, sometimes	49%	54%	52%	53%	50%	58%	43%	47%	57%	51%	73%	56%	52%
No	7%	12%	13%	4%	6%	17%	7%	10%	6%	23%	4%	18%	10%

Base: Respondents who currently ride or are considering riding and have children under 18 (n=759; Under 35 n= 214, 35 to 54 n= 497; SEQ n=4583, ROQ n=176; Current Riders n=516, Considerers n=243; Stakeholders n=267)
 QD3 Thinking about your children who are under 18, do they ride a bicycle?

Children's riding locations

Of those who currently ride or are considering and have children who also ride, the most common locations are on bicycle paths / in parks (59%) and in neighbourhood streets (50%). Those from ROQ are more likely to have children who ride on the footpath and in the backyard.

While Current Riders children are more likely to venture outside the home on the footpath, the children of Considerers are more likely to ride in the backyard.

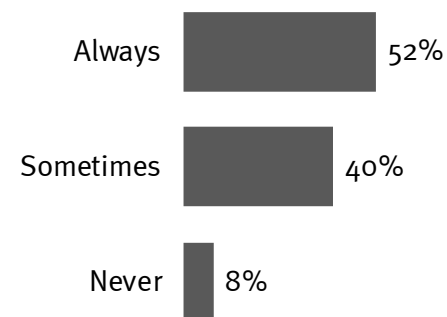


	AGE		REGION		TYPE		Stakeholders
	Under 35	35 to 54	SEQ	ROQ	Current Riders	Considerers	
Bicycle paths / in parks	49%	64%	61%	55%	59%	59%	78%
Streets in the neighbourhood	45%	54%	49%	51%	50%	49%	62%
Foot paths	48%	46%	44%	54%	51%	40%	65%
In the backyard	50%	37%	36%	51%	38%	48%	24%
Back streets (minimal traffic)	31%	45%	40%	41%	43%	35%	59%
Bicycle trails / Off-road	12%	21%	18%	18%	20%	14%	36%
Designated on-road bicycle lanes	9%	11%	9%	14%	11%	9%	19%
Moderate to high traffic roads	8%	7%	6%	10%	9%	5%	9%
On the road generally	4%	5%	4%	7%	4%	8%	15%

Base: Respondents who currently ride or are considering riding and have children under 18 who ride a bike (n=679; Under 35 n=197, 35 to 54 n=440; SEQ n=512, ROQ n=167; Current Riders n=482, Considerers n=197; Stakeholders n=241) QD4 Where do your children ride their bicycles?

Accompanying Children On Rides

While over half always accompany their children on rides, a similar but lower proportion only sometimes accompany their children. Current Riders are more likely than Considerers to always accompany their children.



	AGE		REGION		TYPE		Stakeholders
	Under 35	35 to 54	SEQ	ROQ	Current Riders	Considerers	
Always	64%	46%	52%	51%	55%	45%	51%
Sometimes	34%	42%	40%	41%	42%	36%	46%
Never	2%	11%	8%	8%	2%	20%	3%

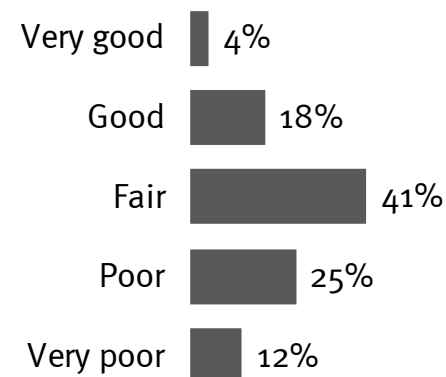
Base: Respondents who currently ride or are considering riding and have children under 18 who ride a bike (n=679; Under 35 n=197, 35 to 54 n=440; SEQ n=512, ROQ n=167; Current Riders n=482, Considerers n=197; Stakeholders n=241) QD5 Do you accompany your children on rides?

Part 8 - Cycling rules

Knowledge of Legislation

While over three in five say their knowledge of legislation is fair to very good (63%), around two in five say it is poor to very poor (37%). Few say it is very good (4%).

Those under 35, females and Considerers are more likely to say it is poor. While Rejecters are most likely to say it is very poor, suggesting a need for additional knowledge amongst these groups.



	AGE			GENDER		TYPE			Stakeholders
	Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	Rejecters	
Very good	4%	4%	4%	5%	3%	5%	3%	3%	29%
Good	14%	18%	21%	21%	15%	24%	13%	14%	43%
Fair	39%	41%	44%	41%	42%	42%	41%	40%	23%
Poor	30%	24%	20%	22%	27%	21%	30%	24%	5%
Very poor	13%	12%	11%	11%	13%	7%	12%	18%	1%

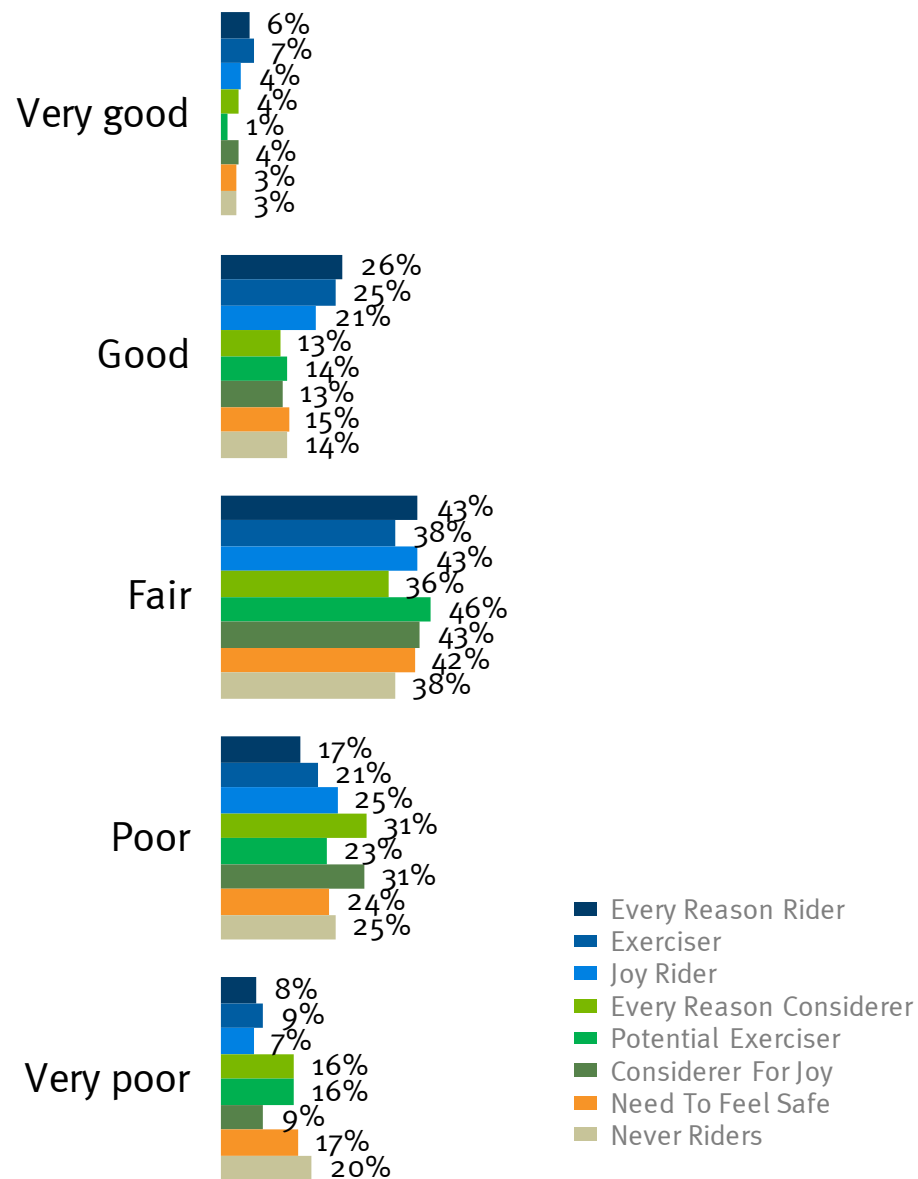
Base: All respondents (n=3558; Under 35 n=775, 35 to 54 n=1280, 55+ n=1503; Male n=1416, Female n=2141; Current Riders n=1509, Considerers n=894, Rejecters n=1155; Stakeholders n=794)
 QE1 How would you rate your knowledge of Queensland legislation as it applies to cycling?

Knowledge of Legislation

By segments

Knowledge of legislation remains conservative amongst segments as well, with few indicating their knowledge is very good. Need to Feel Safe and Never Riders are the most likely to have knowledge that is very poor.

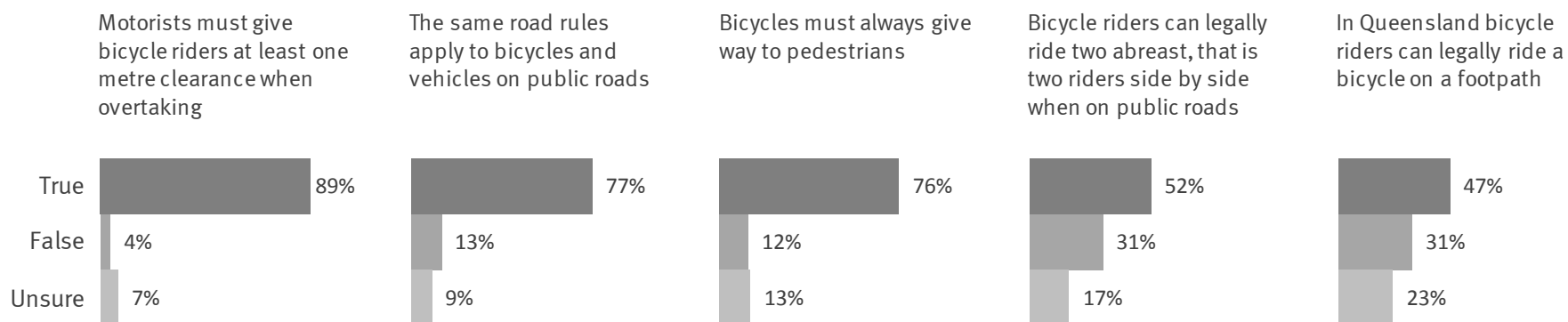
Every Reason Considerers are also the most likely to have knowledge that is poor, again suggesting a need for additional knowledge amongst these groups.



Base: All respondents (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551, Need To Feel Safe n=589, Never Riders n=530) QE1 How would you rate your knowledge of Qld legislation as it applies to cycling?

Legislation knowledge

The 1m rule attracts the highest degree of awareness from those who ride or who would consider it. Less are aware that bicycles can ride two abreast and can ride on the footpath. Generally, those under 35 have the lowest degree of knowledge regarding these statements.



	AGE			REGION		TYPE		Stakeholders
	Under 35	35 to 54	55+	SEQ	ROQ	Current Riders	Considerers	
Motorists must give bicycle riders at least one metre clearance when overtaking	81%	94%	97%	89%	90%	88%	91%	99%
The same road rules apply to bicycles and vehicles on public roads	67%	83%	86%	75%	82%	77%	77%	93%
Bicycles must always give way to pedestrians	69%	80%	81%	78%	71%	75%	77%	87%
Bicycle riders can legally ride two abreast, that is two riders side by side when on public roads	46%	54%	59%	51%	55%	54%	50%	96%
In Queensland bicycle riders can legally ride a bicycle on a footpath	49%	46%	44%	46%	48%	51%	40%	82%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894; Stakeholders n=788) QE2 For each of the following statements about legislation in Queensland, please indicate whether you believe the statement is true or false.

Part 9 - Riding motivators

Influences On Decision To Ride

Fitness and enjoyment are the main motivators for those who ride or who would consider it. Few ride to improve the community or to get as many cars off the road as possible. This being said, a moderate proportion ride to be environmentally friendly. Few still ride to save money or because they lack access to a private vehicle, suggesting that reasons to ride are often emotive rather than functional.



Base: All respondents who currently ride or are considering riding (n=2403) QF1 How much do the following factors influence your decision to ride a bicycle?

Influences On Decision To Ride

By demographics

Riding for exercise / health is a key motivator for females and those above 35. Those below 54 are more likely to ride as an activity to do with family / friends, to save money and to save time. They are also more likely to ride to improve the community and get as many cars off the road as possible, those below 35 in particular are likely to ride to improve the environment.

Current Riders are more likely than Considerers to ride for fun / enjoyment, relaxation, freedom, the environment, to save time and also as an activity to do with family / friends.

	AGE			GENDER		REGION		TYPE		
	Under 35	35 to 54	55+	Male	Female	SEQ	ROQ	Current Riders	Considerers	Stakeholders
For exercise / to keep healthy	7.2	7.5	7.8	7.4	7.6	7.4	7.6	7.5	7.4	9.2
Fun / enjoyment	6.7	7.0	6.9	6.8	6.9	6.8	7.0	7.1	6.5	8.8
Relaxation / reduce stress	6.3	6.4	6.5	6.3	6.5	6.3	6.6	6.6	6.1	8.1
Activity to do with family / friends	6.2	6.5	5.3	5.6	6.6	6.2	5.9	6.3	5.8	6.9
Environmentally friendly	6.4	5.7	5.4	5.8	6.1	5.9	5.8	6.1	5.7	6.7
Freedom	5.8	5.8	5.4	5.7	5.7	5.6	5.8	5.9	5.3	7.3
Saves money	6.2	5.0	4.3	5.3	5.4	4.0	5.2	5.4	5.3	5.1
Getting around / transport	5.6	4.8	4.2	5.1	4.9	5.1	4.9	5.2	4.8	6.0
Improves the community	4.9	4.6	4.0	4.6	4.6	4.6	4.6	4.7	4.5	6.1
Get as many cars off the road as possible	4.7	4.4	3.8	4.3	4.5	4.5	4.2	4.4	4.3	5.5
Saves time	4.5	3.9	3.0	4.1	3.7	4.0	3.7	4.1	3.6	4.5
No access to a private vehicle	4.6	3.1	2.2	3.5	3.6	3.7	3.1	3.3	3.8	0.9

Means out of 10

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=994, Female n=1408; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894; Stakeholders n=788) QF1 How much do the following factors influence your decision to ride a bicycle?

Influences On Decision To Ride

By segments

Unsurprisingly, Every Reason Riders and Considerers are most likely to ride for a variety of reasons, including to be environmentally friendly, to save money and for transport. They are also most likely to ride to save time, get as many cars off the road, improve the community and because they don't have access to a private vehicle.

Exercisers are most likely to ride for exercise / to keep healthy and Joy Riders are most likely to ride for fun / enjoyment and for an activity to do with the children / friends. Potential Exercisers and Considerers for Joy do not have any key defining reasons for riding.

	Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy
For exercise / to keep healthy	7.4	8.1	7.5	7.6	7.8	7.2
Fun / enjoyment	7.0	6.5	7.2	6.6	5.6	6.6
Environmentally friendly	6.9	5.7	5.4	6.9	5.1	5.2
Saves money	6.6	5.1	4.3	6.9	4.9	4.5
Getting around / transport	6.6	4.9	3.9	6.8	3.9	4.0
Relaxation / reduce stress / time alone	6.6	6.6	6.5	6.5	5.5	6.1
Freedom	6.5	5.5	5.5	6.0	4.8	5.1
An activity to do with children / friends	6.1	5.8	6.6	5.7	5.1	6.0
Saves time	5.3	4.0	3.0	4.8	3.1	3.2
Get as many cars off the road as possible	5.3	4.4	3.6	5.4	3.5	3.9
Improves the community	5.3	4.7	4.1	5.6	4.1	4.0
Don't have access to a private vehicle	4.4	3.3	2.2	4.9	3.8	3.4

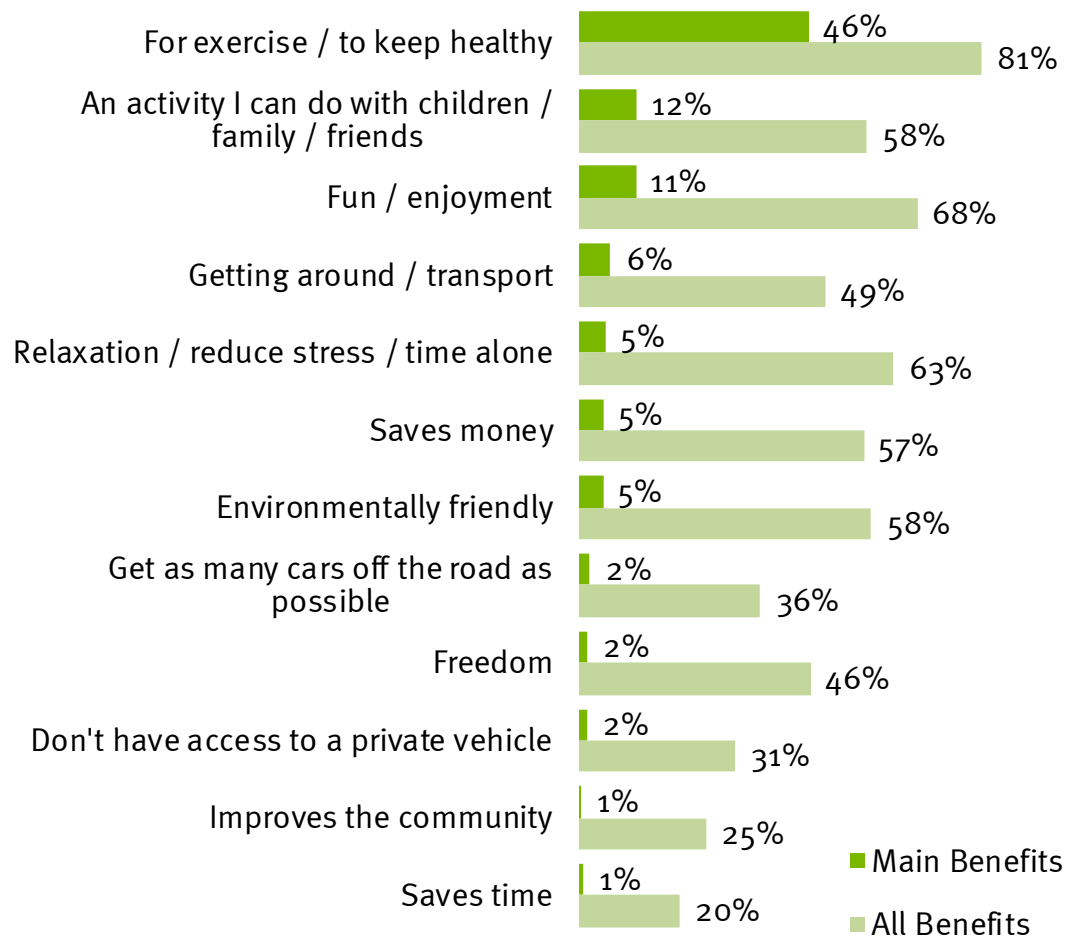
Means out of 10

Base: Respondents who currently ride or are considering riding (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551)

QF1 How much do the following factors influence your decision to ride a bicycle?

Perceived benefits of riding

Of those who currently ride or would consider riding, around half cite exercise / to keep healthy as the main benefit. Although fun / enjoyment and relaxation feature highly when considering all options, when just reporting the main benefit, an activity I can do with family / friends features second.



Base: All respondents who currently ride or are considering riding (n=2403)

QF2 Even though these may not be your reasons for riding, which of the following do you believe are benefits you get from riding a bicycle?

Perceived benefits of riding

By demographics

Those above 35 are more likely to consider exercise, being environmentally friendly, fun and enjoyment and an activity I can do with my family / friends to be benefits of riding. Females and Considerers are more likely to see fitness, saving money, lack of access to a private vehicle, getting around and being environmentally friendly as benefits of riding a bicycle.

	AGE			GENDER		TYPE		
	Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	Stakeholders
For exercise / to keep healthy	72%	83%	92%	77%	85%	76%	87%	98%
Saves money	59%	56%	54%	53%	62%	54%	62%	70%
Don't have access to a private vehicle	35%	30%	27%	26%	38%	26%	39%	30%
Getting around / transport	45%	51%	54%	46%	54%	47%	54%	74%
Environmentally friendly	53%	61%	64%	51%	68%	55%	64%	83%
An activity I can do with children / family / friends	49%	64%	63%	49%	68%	56%	60%	80%
Fun / enjoyment	57%	73%	78%	63%	73%	67%	69%	94%
Freedom	43%	44%	55%	45%	48%	48%	44%	76%
Saves time	23%	20%	17%	17%	24%	21%	20%	48%
Get as many cars off the road as possible	34%	37%	38%	31%	42%	34%	39%	71%
Relaxation / reduce stress / time alone	52%	66%	77%	58%	69%	61%	65%	94%
Improves the community	26%	25%	25%	22%	30%	26%	24%	69%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=994, Female n=1408; Current Riders n=1509, Considerers n=894; Stakeholders n=788)

QF2 Even though these may not be your reasons for riding, which of the following do you believe are benefits you get from riding a bicycle?

Perceived benefits of riding

By segments

Interestingly, those who do not ride but would consider it perceive riding to have the most benefits of any riding typology. In particular, Every Reason Riders and Considerers for Joy perceive the most benefits. Every Reason Riders perceive monetary, access, transport, environmental, time, relaxation and community benefits, while Considerers view fitness, access, recreation and freedom to be benefits. Although Need to Feel Safe individuals do not ride, they do view exercise to be a benefit of riding. This aside, both Rejecters are least likely to view almost all statements as benefits of riding.

	Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy	Need To Feel Safe	Never Riders
For exercise / to keep healthy	72%	73%	81%	85%	85%	88%	86%	83%
Saves money	64%	48%	45%	76%	62%	56%	57%	56%
Don't have access to a private vehicle	30%	21%	24%	47%	38%	35%	15%	18%
Getting around / transport	52%	39%	43%	66%	46%	50%	40%	41%
Environmentally friendly	56%	53%	54%	71%	60%	62%	62%	59%
Activity to do with children / friends	48%	52%	64%	53%	51%	65%	35%	36%
Fun / enjoyment	60%	56%	75%	67%	49%	75%	43%	43%
Freedom	47%	40%	50%	47%	30%	46%	21%	23%
Saves time	27%	14%	16%	29%	11%	18%	7%	7%
Get cars off the road	39%	29%	31%	51%	28%	37%	28%	25%
Relaxation / reduce stress / time alone	53%	59%	69%	65%	50%	69%	35%	37%
Improves the community	28%	20%	26%	33%	16%	22%	8%	8%

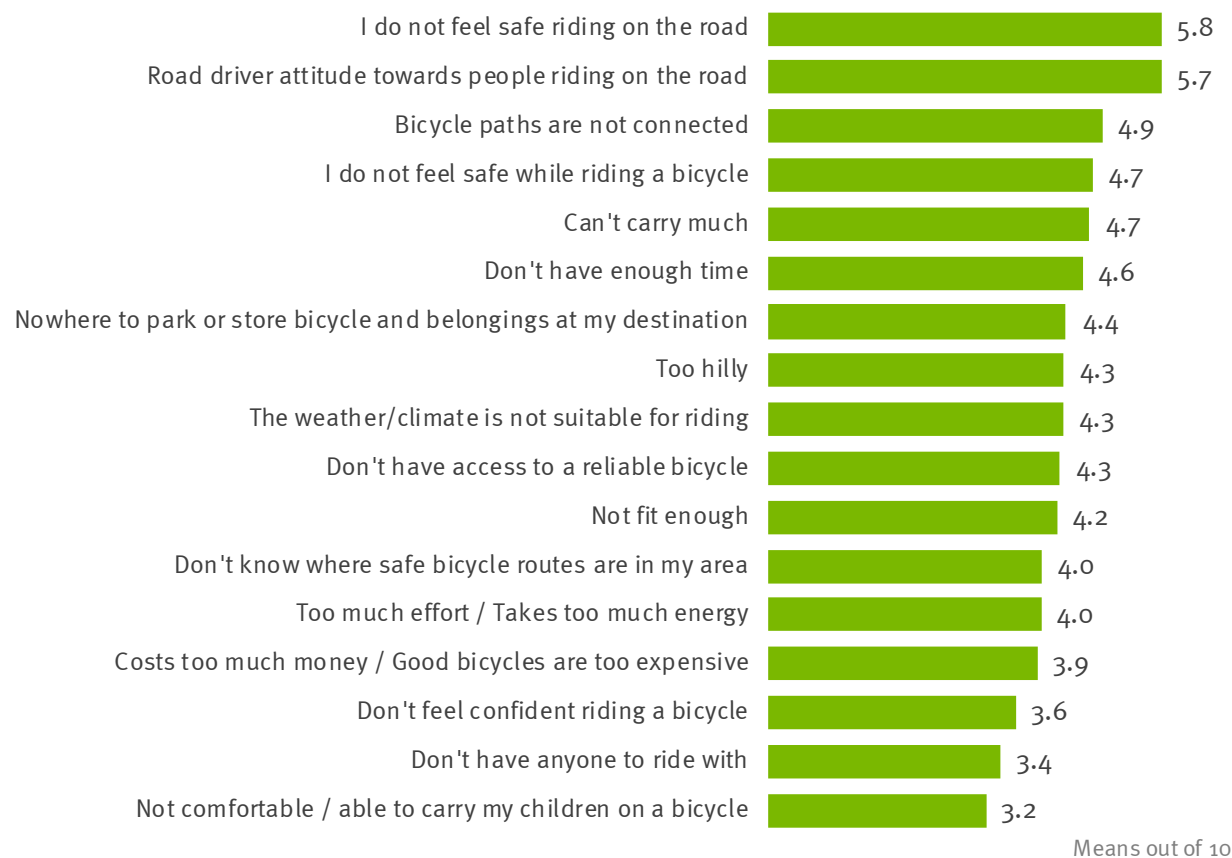
Base: All respondents (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551, Need To Feel Safe n=611, Never Riders n=544)

QF2 Even though these may not be your reasons for riding, which of the following do you believe are benefits you get from riding a bicycle?

Part 10 - Riding barriers

Barriers to riding

Overall, key barriers to riding for those who currently ride or who would consider it relate to a lack of perceived safety on the road as well as driver attitudes towards riders. This being said, agreement with these statements is moderate, suggesting that whilst these act as barriers, they only moderately prevent individuals from riding. Few ride because they do not feel confident, do not have riding partners or do not feel comfortable / have difficulty carrying their children.



Base: All respondents who currently ride or are considering riding (n=2403) QG1 How much influence do the following factors have on preventing you from riding a bicycle more often?

Barriers to riding

By demographics

Among other barriers, both females and those aged below 54 view a lack of knowledge of safe bicycle routes, fitness, confidence, bike paths not being connected and a lack of storage as barriers to riding more often.

	AGE			GENDER		REGION		TYPE		
	Under 35	35 to 54	55+	Male	Female	SEQ	ROQ	Current Riders	Considerers	Stakeholders
Don't know any safe bicycle routes	4.7	3.9	2.9	3.7	4.4	4.1	3.7	3.9	4.1	1.9
Not fit enough	4.5	4.3	3.7	4	4.5	4.3	4	4	4.6	1.1
Don't feel confident riding	4.3	3.3	2.9	3.2	4.1	3.7	3.5	3.3	4.1	0.6
Bicycle paths are not connected	5.2	5.1	4.1	4.7	5.1	4.9	4.8	4.8	5	5.4
Nowhere to park or store bicycle	4.9	4.4	3.4	4.2	4.5	4.4	4.2	4.3	4.4	3.5
Can't carry much	5.5	4.6	3.4	4.5	4.9	4.8	4.5	4.7	4.8	2.1
Don't have enough time	5.3	4.9	3.1	4.5	4.7	4.7	4.3	4.8	4.3	2.7
Don't have anyone to ride with	4.2	3.1	2.4	3.3	3.5	3.4	3.2	3.4	3.3	1.1
Costs too much	4.7	3.7	3	4	3.9	4	3.8	3.7	4.3	0.9
Don't feel safe riding	5	4.6	4.5	4.3	5.2	4.9	4.4	4.5	5.1	3.7
Don't feel safe riding on the road	5.9	5.7	5.6	5.2	6.4	5.9	5.5	5.5	6.1	4.9
Too hilly	4.7	4.2	3.7	4.1	4.6	4.6	3.7	4.3	4.3	1.7
The weather/climate	4.8	4.5	3.3	4.2	4.4	4.4	4.1	4.5	4	2.5
Driver attitude towards riders	5.8	5.8	5.6	5.4	6.2	5.8	5.5	5.5	6.1	6.2
Don't have access to a reliable bicycle	5	4	3.3	4.2	4.3	4.3	4.2	3.6	5.3	0.3
Not comfortable	4.1	3.3	1.6	3	3.4	3.3	3	3.3	3	0.7
Too much effort	4.7	4	2.8	3.8	4.2	4	3.9	3.9	4.1	1

Means out of 10

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=994, Female n=1408; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894; Stakeholders n=788) QG1 How much influence do the following factors have on preventing you from riding a bicycle more often?

Barriers to riding

By segments

Every Reason Considerers and Considerers for Joy perceive the most barriers to riding more often. Namely, they view not feeling safe on the road / on a bicycle, driver attitudes and lack of access to a reliable bicycle as barriers. While an inability to carry much, storage, lack of knowledge of safe bicycle routes and cost are more likely to be perceived as barriers by Every Reason Considerers, Considerers for Joy are more likely to view lack of fitness and confidence as barriers. This suggests multiple knowledge gaps to address for Considerers in a bid to increasing riding frequency.

	Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy
Don't feel safe riding on the road	5.6	5.5	5.5	6.3	5.4	6.2
Driver attitude towards riders	5.7	5.6	5.4	6.3	5.3	6.1
Bicycle paths are not connected	5.1	4.8	4.6	5.2	4.9	4.8
Don't feel safe while riding a bicycle	4.8	4.7	4.1	5.4	4.4	5.1
Can't carry much	5.1	4.7	4.2	5.5	4.5	4.4
Don't have enough time	4.7	5.2	4.7	4.5	4.4	4.2
Don't have access to a reliable bicycle	4.2	4.0	2.9	6.2	4.5	5.1
Nowhere to park or store bicycle	4.7	4.2	4.0	5.4	3.2	4.2
Too hilly	4.6	4.6	3.9	4.7	3.9	4.3
Not fit enough	4.1	4.8	3.7	4.2	4.7	4.8
The weather/climate	5.0	4.9	3.9	4.3	4.0	3.9
Too much effort	4.1	4.6	3.6	4.5	4.3	3.9
Don't know any safe bicycle routes	4.3	4.2	3.5	4.8	3.9	3.9
Cost too much money	4.2	3.9	3.2	5.2	4.0	4.0
Don't feel confident riding	3.8	3.7	2.8	3.9	3.8	4.2
Don't have anyone to ride with	3.9	3.6	2.9	3.5	3.3	3.3
Not comfortable	3.7	3.8	2.8	3.1	2.9	3.1

Means out of 10

Base: Respondents who currently ride or are considering riding (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551)

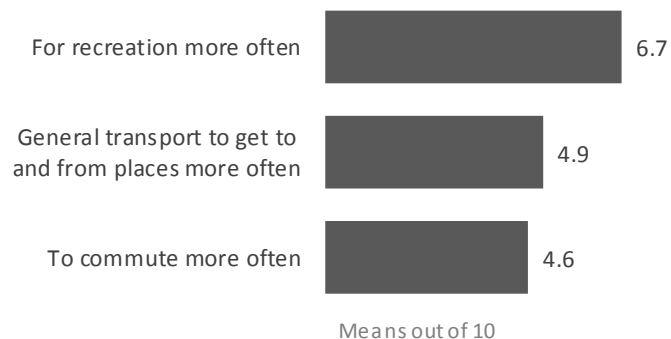
QG1 How much influence do the following factors have on preventing you from riding a bicycle more often?

Desire to ride more often

There is moderate agreement that those who ride or who would consider it would like to ride for recreation more often. Those aged between 35 to 54 and those from ROQ are more likely to agree with this statement than younger participants and those from SEQ.

Some also agree that they would like to ride a bicycle for transport or to commute more often. Males and those below 54 are more likely to agree with these statements.

I would like to ride a bicycle...



I would like to ride a bicycle...	AGE			GENDER		REGION		TYPE	
	Under 35	35 to 54	55+	Male	Female	SEQ	ROQ	Current Riders	Considerers
For recreation more often	6.6	6.9	6.7	6.7	6.7	6.6	7.0	6.9	6.4
To commute more often	5.3	4.7	3.3	4.7	4.4	4.6	4.6	5.2	3.6
For general transport to get to and from places more often	5.5	4.9	3.8	5.0	4.7	4.9	4.7	5.4	4.0

Means out of 10

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=994, Female n=1408; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894)
 QG2 How much do you agree with the following statements?

Desire to ride more often

By segments

Unsurprisingly Joy Riders are the most likely to agree that they would like to ride a bicycle for recreation more often, while Potential Exercisers are the least likely to agree with this statement. Every Reason Riders and Considerers are most likely to agree that they would like to ride a bicycle for transport or to commute more often. Joy Riders, Potential Exercisers and Considerers for Joy are the least likely to agree with this statement.

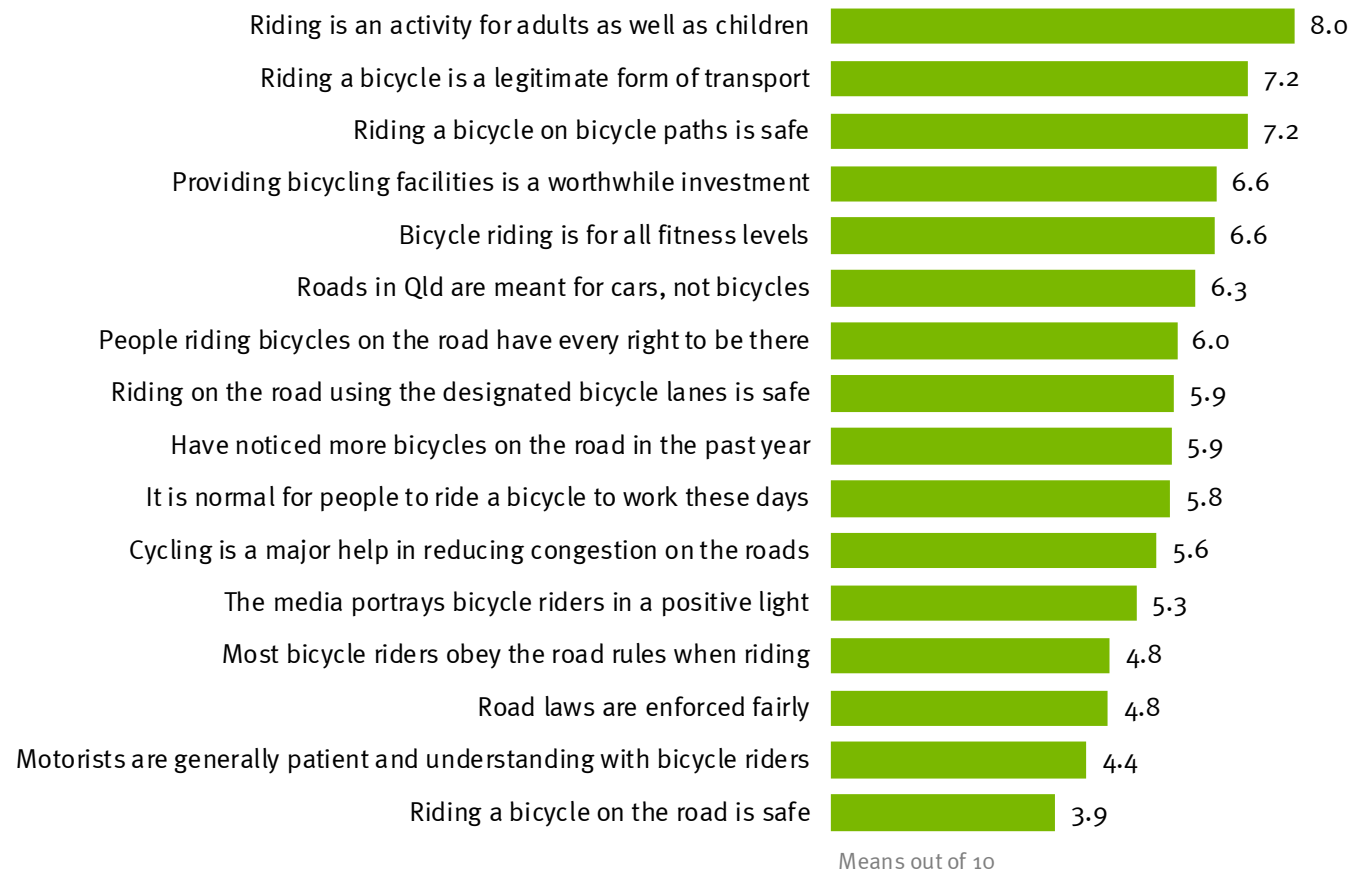
I would like to ride a bicycle...	Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy
For recreation more often	6.9	6.5	7.1	6.4	5.6	6.5
To commute more often	6.4	4.7	4.2	5.3	3.2	2.9
For general transport to get to and from places more often	6.6	4.8	4.4	5.8	3.3	3.4

Base: Respondents who currently ride or are considering riding (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551)
 QG2 How much do you agree with the following statements?

Part 11 - Attitudes

Attitudes towards riding

While there is somewhat strong agreement that riding a bicycle is a suitable activity for children and adults, there is only moderate agreement that it is a legitimate form of transport. Further, while some feel that riding on bike paths is safe, there is low levels of agreement that designated bike lanes are safe and even less agreement that riding on the road is safe. Few also feel that motorists are patient towards bicycle riders and that the media portrays riders in a positive light, suggesting that safety and driver/community attitudes need to be addressed to improve attitudes towards riding.



Base: All respondents (n=3558) QH1 How much do you agree with the following statements?

Attitudes towards riding

By demographics

Although those above 35 are more likely to agree that bike riding is for children and adults and that it is a legitimate form of transport, they are less likely to feel that riding on the road is safe or that laws are enforced fairly. While Current Riders are more likely to agree with almost all statements, both Current Riders and Considerers are likely to agree that riding is a legitimate form of transport and that it is normal for people to ride to work these days, suggesting Considerers may be partial to riding to work in the future.

	AGE			REGION		TYPE			Stakeholders
	Under 35	35 to 54	55+	SEQ	ROQ	Current Riders	Considerers	Rejecters	
Riding is an activity for adults as well as children	7.5	8.1	8.3	7.8	8.3	8	8.1	7.8	9.6
Riding a bicycle is a legitimate form of transport	6.8	7.2	7.5	7.1	7.4	7.4	7.4	6.8	9.6
Riding a bicycle on bicycle paths is safe	7	7.2	7.3	7.2	7.2	7.2	7.1	7.2	7.6
Providing bicycling facilities is a worthwhile investment	6.4	6.8	6.7	6.5	6.8	7	6.7	6	9.5
Bicycle riding is for all fitness levels	6.5	6.7	6.6	6.5	6.8	7	6.6	6.1	9
Roads in Qld are meant for cars, not bicycles	6.3	6.1	6.4	6.3	6.2	5.7	6.1	7.2	2.6
People riding bicycles on the road have every right to be there	5.7	5.8	6.3	5.8	6.2	6.5	6	5.2	9.5
Riding on the road using the designated bicycle lanes is safe	5.9	5.8	6	5.8	6.1	6.1	5.8	5.8	5.4
Have noticed more bikes on the road in the past year	5.9	5.8	5.9	6	5.6	6	5.8	5.7	6.9
It is normal for people to ride a bicycle to work these days	6	5.9	5.6	5.9	5.8	6.1	5.9	5.5	6.4
Cycling is a major help in reducing congestion on the roads	5.8	5.7	5.4	5.5	5.8	6.1	5.7	4.9	8.7
The media portrays bicycle riders in a positive light	5.2	5.2	5.4	5.2	5.4	5.4	5	5.4	2.1
Most bicycle riders obey the road rules when riding	5	4.7	4.7	4.8	4.8	5.3	4.9	4.1	7.3
Road laws are enforced fairly	5.1	4.5	4.7	4.7	4.8	5.2	4.8	4.2	4
Motorists are patient and understanding with riders on the road	4.4	4.2	4.6	4.5	4.3	4.6	4.1	4.4	4.5
Riding a bicycle on the road is safe	4.4	3.7	3.5	3.8	3.9	4.4	3.9	3.1	3.9

Means out of 10

Base: All respondents (n=3558; Under 35 n=775, 35 to 54 n=1280, 55+ n=1503; Male n=1416, Female n=2141; SEQ n=2667, ROQ n=891; Current Riders n=1509, Considerers n=894, Rejecters n=1155; Stakeholders n=794)
 QH1 How much do you agree with the following statements?

Attitudes towards riding

By segments

Every Reason Riders are more likely to agree with almost all statements, in particular they are most likely to agree that bicycle riding is for all fitness levels and that riding on designated bike lanes is safe. Every Reason Riders, Joy Riders and Every Reason Considerers are the most likely to feel that providing bicycle facilities is a worthwhile investment. Rejecters are the least likely to agree that riding on the road is safe, that riders have every right to be on the road and that riding is for all fitness levels, suggesting a need to improve skills / knowledge in these areas.

	Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy	Need To Feel Safe	Never Riders
Riding is an activity for adults as well as children	7.9	7.7	8.1	8.5	7.8	8.1	8.0	7.6
Riding a bicycle is a legitimate form of transport	7.4	7.2	7.3	7.8	7.1	7.2	7.1	6.5
Riding a bicycle on bicycle paths is safe	7.3	7.1	7.1	7.1	7.2	7.1	7.2	7.2
Providing bicycling facilities is a worthwhile investment	7.2	6.7	7.0	7.2	6.4	6.6	6.4	5.6
Bicycle riding is for all fitness levels	7.1	7.0	6.9	6.7	6.5	6.7	6.2	5.9
Roads in Qld are meant for cars, not bicycles	5.7	5.5	5.7	6.1	6.0	6.1	7.0	7.3
People riding on the road have every right to be there	6.9	6.5	6.2	6.6	5.9	5.7	5.6	4.7
Riding on the road using the designated bicycle lanes is safe	6.3	6.2	5.8	6.0	6.2	5.6	5.9	5.7
Have noticed more bikes on the road in the past year	6.3	6.0	5.8	5.9	5.1	5.9	5.7	5.8
It is normal for people to ride to work these days	6.4	6.0	5.8	6.3	5.5	5.7	5.6	5.4
Cycling is a major help in reducing congestion on the roads	6.7	5.8	5.6	6.6	5.4	5.3	5.3	4.4
The media portrays bicycle riders in a positive light	5.6	5.4	5.2	5.1	5.2	4.9	5.2	5.5
Most bicycle riders obey the road rules when riding	5.7	5.1	4.9	5.4	5.0	4.6	4.4	3.8
Road laws are enforced fairly	5.7	5.1	4.7	5.0	5.0	4.7	4.5	3.8
Motorists are patient and understanding with riders on the road	5.0	4.4	4.3	4.0	4.3	4.2	4.5	4.3
Riding a bicycle on the road is safe	4.9	4.7	4.0	4.3	4.1	3.6	3.2	3.0

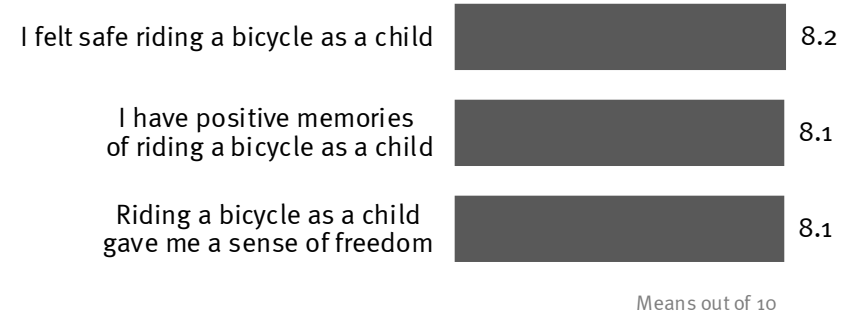
Means out of 10

Base: All respondents (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551, Need to Feel Safe n=611, Never Riders n=544)
 QH1 How much do you agree with the following statements?

Attitudes about riding as a child

Overall, there is strong agreement that those who rode as children felt safe, had positive memories and felt a sense of freedom. While those above 55 are more likely to agree that they felt safe and have positive memories, those above 35 are more likely to agree that they felt a sense of freedom.

Considerers are more likely than Rejecters to agree that riding as a child gave them a sense of freedom. This again suggests that when converting Considerers, accessing positive childhood memories, in particular feelings of freedom, may be a useful way to elicit nostalgia.



	AGE			REGION		TYPE			
	Under 35	35 to 54	55+	SEQ	ROQ	Current Riders	Considerers	Rejecters	Stakeholders
I have positive memories of riding a bicycle as a child	7.6	8.3	8.5	8.1	8.2	8.2	8.2	8.0	9.3
I felt safe riding a bicycle as a child	7.7	8.2	8.6	8.1	8.3	8.1	8.2	8.1	8.9
Riding a bicycle as a child gave me a sense of freedom	7.7	8.3	8.5	8.1	8.2	8.1	8.3	8.0	9.2

Means out of 10

Base: Respondents who rode as a child (n=3246; Under 35 n=730, 35 to 54 n=1199, 55+ n=1317; Male n=1333, Female n=1912; Current Riders n=1453, Considerers n=861, Rejecters n=950; Stakeholders n=755) QH2 How much do you agree with the following statements?

Views about riding

Overall, while there is moderate agreement that riding gives individuals a sense of freedom, there is neutral agreement that individuals know where to go to find information about bicycle infrastructure or that there is good infrastructure in their local area.

Current Riders, those from SEQ and those who are over 55 are more knowledgeable about where to find this information. Few describe themselves as a cyclist, slightly more would describe themselves as someone who rides a bike, especially those below 54.

	AGE			REGION		TYPE		Stakeholders	
	Overall	Under 35	35 to 54	55+	SEQ	ROQ	Current Riders		Considerers
Riding a bicycle gives me a sense of freedom	6.1	6.1	6.2	6.1	6.1	6.2	6.5	5.5	8.8
I am willing to change the way I travel if it is helpful for the environment	5.2	5.6	5.1	4.6	5.3	5.0	5.6	4.6	7.5
I know where to go to find information about bicycle infrastructure in my area (e.g. bike paths)	5.0	4.9	4.8	5.5	5.1	4.8	5.3	4.5	7.5
I feel safe riding a bicycle on the road in Queensland	4.5	5.1	4.3	3.8	4.5	4.5	4.9	3.7	4.6
There is good bicycle infrastructure (e.g. bike paths) in my area	5.4	5.6	5.1	5.2	5.6	4.9	5.7	4.8	5.0
Bicycle riding is a convenient way to get around in my area	5.5	5.7	5.4	5.5	5.5	5.6	5.9	5.0	7.0
I would describe myself as a cyclist	3.1	3.6	3.0	2.6	3.1	3.2	4.0	1.9	8.5
I would describe myself as someone who rides a bike	4.3	4.6	4.2	3.7	4.3	4.2	5.3	2.6	9.1

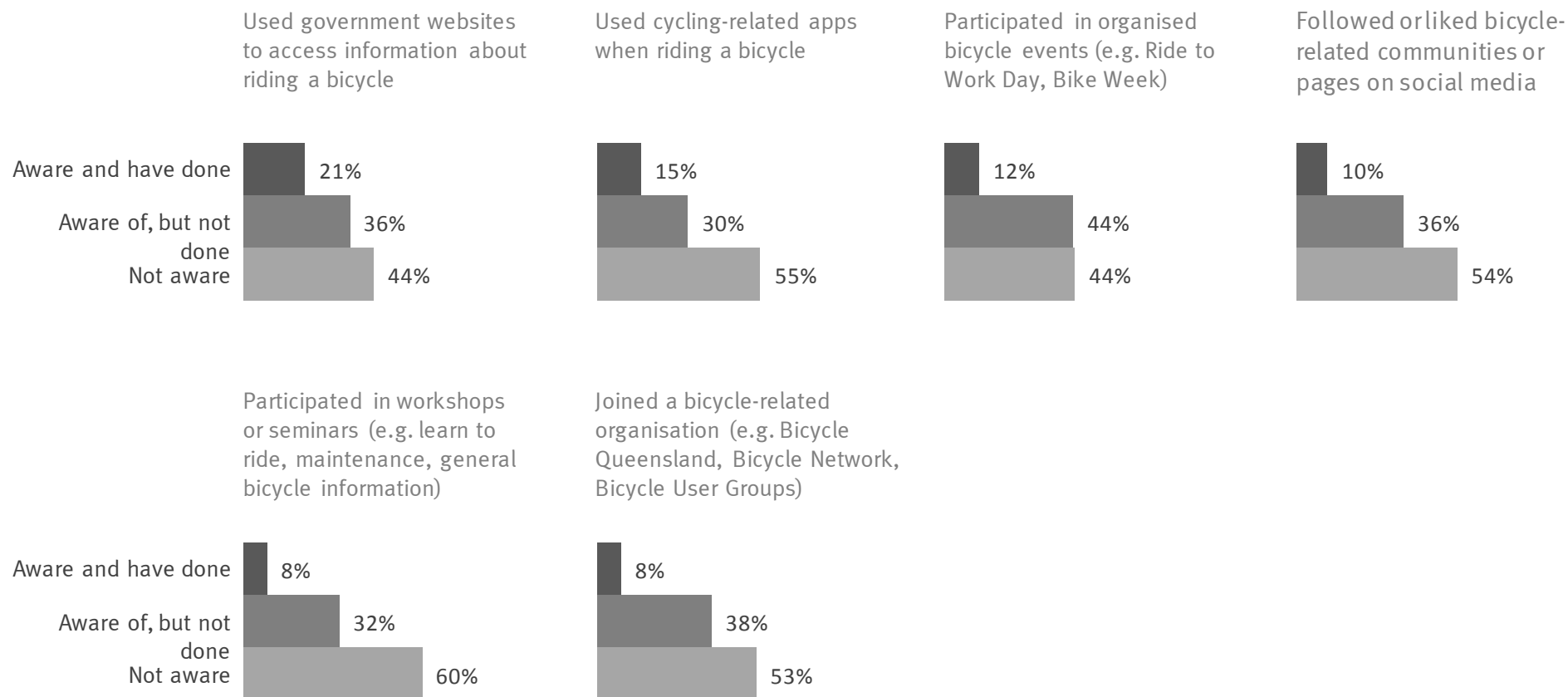
Means out of 10

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894; Stakeholders n=788)
 QH3 How much do you agree with the following statements?

Part 12 - Initiatives & encouraging riding

Bicycle related activities

Few are aware of and have participated in bicycle related activities. While only one in five have used government websites to access information about riding a bicycle, this activity received the highest rate of awareness and participation. While around one in ten have participated in organised bicycle events and followed or liked bicycle related communities, around two in five are aware of these activities. More than half are unaware of cycling-related apps, joined a bicycle related organisation or participated in workshops / seminars.



Base: Respondents who currently ride or are considering riding (n=2403) Q11 Please indicate whether you have ever participated or done any of the following?

Bicycle related activities

By demographics

Those over 35, females and Considerers are more likely to be unaware of all activities, suggesting a potential to increase knowledge of various bicycle related activities to improve engagement and knowledge.

		AGE			GENDER		TYPE		
		Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	Stakeholders
Participated in organised bicycle events	Aware and done	17%	11%	5%	15%	8%	18%	4%	76%
	Aware of, but not done	44%	41%	47%	42%	45%	46%	40%	22%
	Not aware	39%	48%	48%	42%	47%	36%	56%	3%
Participated in workshops or seminars	Aware and done	11%	8%	3%	10%	6%	11%	3%	40%
	Aware of, but not done	39%	26%	29%	35%	29%	37%	25%	49%
	Not aware	50%	66%	68%	55%	65%	52%	72%	11%
Joined a bicycle-related organisation	Aware and done	13%	6%	3%	11%	5%	12%	2%	78%
	Aware of, but not done	40%	34%	41%	40%	36%	43%	31%	19%
	Not aware	47%	60%	56%	49%	59%	45%	67%	3%
Followed or liked bicycle-related communities or pages on social media	Aware and done	15%	9%	4%	12%	8%	15%	2%	90%
	Aware of, but not done	44%	30%	30%	39%	33%	40%	30%	7%
	Not aware	41%	61%	67%	49%	60%	45%	68%	2%
Used cycling-related apps when riding a bicycle	Aware and done	22%	14%	4%	19%	10%	22%	3%	83%
	Aware of, but not done	35%	29%	26%	31%	29%	34%	26%	14%
	Not aware	44%	58%	70%	50%	61%	44%	71%	3%
Used government websites to access information about riding a bicycle	Aware and done	24%	20%	16%	25%	16%	28%	10%	74%
	Aware of, but not done	37%	34%	36%	34%	38%	35%	36%	16%
	Not aware	39%	46%	48%	42%	46%	37%	54%	10%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=994, Female n=1408; Current Riders n=1509, Considerers n=894; Stakeholders n=788)

Q1 Please indicate whether you have ever participated or done any of the following?

Bicycle related activities

By segments

Potential Exercisers and Considerers for Joy are most likely to be unaware of organised bicycle events, bicycle related communities, cycling related apps and government websites about riding a bike. Considerers for Joy are also least likely to be aware of workshops / seminars and bicycle related organisations, suggesting that Considerers for Joy are the segment with the most need.

		Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy
Participated in organised bicycle events	Aware and done	25%	24%	9%	3%	4%	3%
	Aware of, but not done	43%	46%	49%	52%	37%	35%
	Not aware	32%	30%	42%	45%	59%	61%
Participated in workshops or seminars	Aware and done	18%	10%	6%	3%	4%	2%
	Aware of, but not done	42%	39%	32%	36%	28%	19%
	Not aware	41%	51%	62%	61%	68%	79%
Joined a bicycle-related organisation	Aware and done	18%	8%	7%	3%	4%	2%
	Aware of, but not done	44%	51%	41%	40%	32%	26%
	Not aware	38%	41%	52%	58%	63%	73%
Followed or liked bicycle-related communities or pages on social media	Aware and done	22%	20%	8%	2%	4%	2%
	Aware of, but not done	43%	44%	36%	47%	24%	23%
	Not aware	35%	36%	56%	51%	73%	75%
Used cycling-related apps when riding a bicycle	Aware and done	31%	26%	13%	5%	2%	2%
	Aware of, but not done	34%	39%	32%	35%	26%	21%
	Not aware	35%	35%	55%	60%	72%	77%
Used government websites to access information about riding a bicycle	Aware and done	34%	25%	22%	13%	5%	10%
	Aware of, but not done	36%	39%	34%	39%	37%	33%
	Not aware	30%	36%	44%	48%	58%	56%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=994, Female n=1408; Current Riders n=1509, Considerers n=894; Stakeholders n=788)

Q1 Please indicate whether you have ever participated or done any of the following?

Encouraging riding

Across the Qld market as a whole, good directional signage, more infrastructure and free bicycle starter packs are the most popular initiatives to encourage more riding.

	AGE			TYPE		Stakeholders	
	Overall	Under 35	35 to 54	55+	Current Riders		Considerers
Good directional signage on bikeways (showing destinations and distances)	69%	70%	66%	69%	72%	64%	77%
More off-road bicycle riding infrastructure	69%	71%	70%	64%	72%	64%	86%
Free bicycling starter pack (e.g. helmet, bicycle lights, map)	67%	69%	67%	61%	68%	64%	36%
More on-road bicycle riding infrastructure	66%	64%	69%	65%	68%	62%	93%
Better enforcement of laws protecting people riding bicycles	64%	65%	62%	66%	66%	61%	93%
Incentives, such as monetary help with buying a bicycle or accessories	62%	67%	65%	52%	62%	63%	60%
Rewards, such as earning points per km for riding to work, to be used for workplace benefits	53%	67%	53%	30%	59%	44%	68%
Make renting/borrowing bicycles cheaper or easier	50%	57%	49%	39%	51%	48%	41%
Apps that monitor distance and associated health metrics	49%	57%	49%	38%	52%	45%	52%
Community initiatives that encourage riding a certain number of hours per week	46%	50%	44%	40%	52%	36%	65%
Promotion of bicycle riding in workplaces	42%	49%	43%	31%	49%	32%	75%
More community discussion and support	42%	46%	40%	38%	47%	35%	77%
Social riding groups	37%	40%	36%	32%	42%	29%	68%
Community bicycle riding festivals	35%	39%	35%	28%	42%	23%	67%
Competitive riding groups	18%	26%	17%	8%	23%	11%	31%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894; Stakeholders n=788)

Q12 Which of the following would encourage you to ride a bicycle more often than you do now?

Encouraging riding

By segments

Across all segments, infrastructure and signage are popular initiatives. Every Reason Considerers are more likely to choose free bicycling starter pack and monetary help, indicating their readiness to take up riding again.

	Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Consider For Joy
More off-road bicycle riding infrastructure	75%	64%	71%	65%	56%	66%
Good directional signage on bikeways	74%	74%	69%	74%	57%	61%
More on-road bicycle riding infrastructure	74%	60%	64%	74%	48%	60%
Free bicycling starter pack	73%	64%	65%	75%	55%	61%
Better enforcement of laws protecting riders	70%	68%	63%	68%	60%	58%
Rewards, like earning points per km for riding	67%	53%	53%	61%	39%	38%
Monetary help with buying a bicycle or accessories	66%	66%	56%	78%	57%	58%
Make renting/borrowing bicycles cheaper or easier	62%	48%	42%	57%	42%	44%
Promotion of bicycle riding in workplaces	58%	43%	43%	43%	30%	27%
More community discussion and support	57%	43%	39%	37%	33%	34%
Apps that monitor distance and health metrics	57%	63%	46%	48%	49%	43%
Encourage riding a certain number of hours per	57%	52%	47%	43%	28%	35%
Community bicycle riding festivals	48%	46%	37%	24%	16%	24%
Social riding groups	46%	47%	37%	34%	23%	28%
Competitive riding groups	26%	34%	18%	13%	16%	9%

Base: Respondents who currently ride or are considering riding (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551)

Q12 Which of the following would encourage you to ride a bicycle more often than you do now?

Most likely to encourage riding

More infrastructure and free bicycle starter packs are reported to be the most likely to encourage more riding. Older people (aged over 35) are more likely to mention more infrastructure, while younger people (aged under 35) are more likely to mention making renting/borrowing easier and rewards.

	Overall	AGE			TYPE		
		Under 35	35 to 54	55+	Current Riders	Considerers	Stakeholders
Free bicycling starter pack (e.g. helmet, bicycle lights, map)	16%	16%	17%	13%	16%	15%	1%
More off-road bicycle riding infrastructure	16%	12%	18%	21%	16%	17%	16%
Incentives, such as monetary help with buying a bicycle or accessories	11%	10%	12%	11%	8%	16%	2%
More on-road bicycle riding infrastructure	10%	6%	12%	13%	11%	8%	34%
Make renting/borrowing bicycles cheaper or easier	8%	11%	6%	5%	8%	8%	1%
Rewards, such as earning points per km for riding to work, to be used for workplace benefits	8%	11%	7%	2%	7%	9%	4%
Better enforcement of laws protecting people riding bicycles	7%	4%	6%	14%	6%	9%	21%
Good directional signage on bikeways (showing destinations and distances)	6%	5%	6%	9%	7%	5%	2%
Social riding groups	5%	6%	3%	4%	5%	4%	6%
Promotion of bicycle riding in workplaces	3%	6%	2%	1%	5%	1%	3%
Community initiatives that encourage riding a certain number of hours per week	3%	4%	2%	2%	3%	2%	2%
Apps that monitor distance and associated health metrics	3%	3%	4%	2%	3%	3%	0%
Community bicycle riding festivals	2%	1%	3%	2%	2%	1%	2%
Competitive riding groups	1%	1%	0%	0%	1%	0%	3%
More community discussion and support	1%	2%	1%	1%	2%	1%	2%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894; Stakeholders n=788), Q15 Which of the following would encourage you the MOST to ride a bicycle more often than you do now?

Most likely to encourage riding

By segments

Across all segments, free starter pack and infrastructure are reported to be the most likely to encourage more riding. Every Reason Considerers are more likely to mention monetary help, indicating their readiness to take up cycling again. Joy Riders are more likely to mention off-road infrastructure.

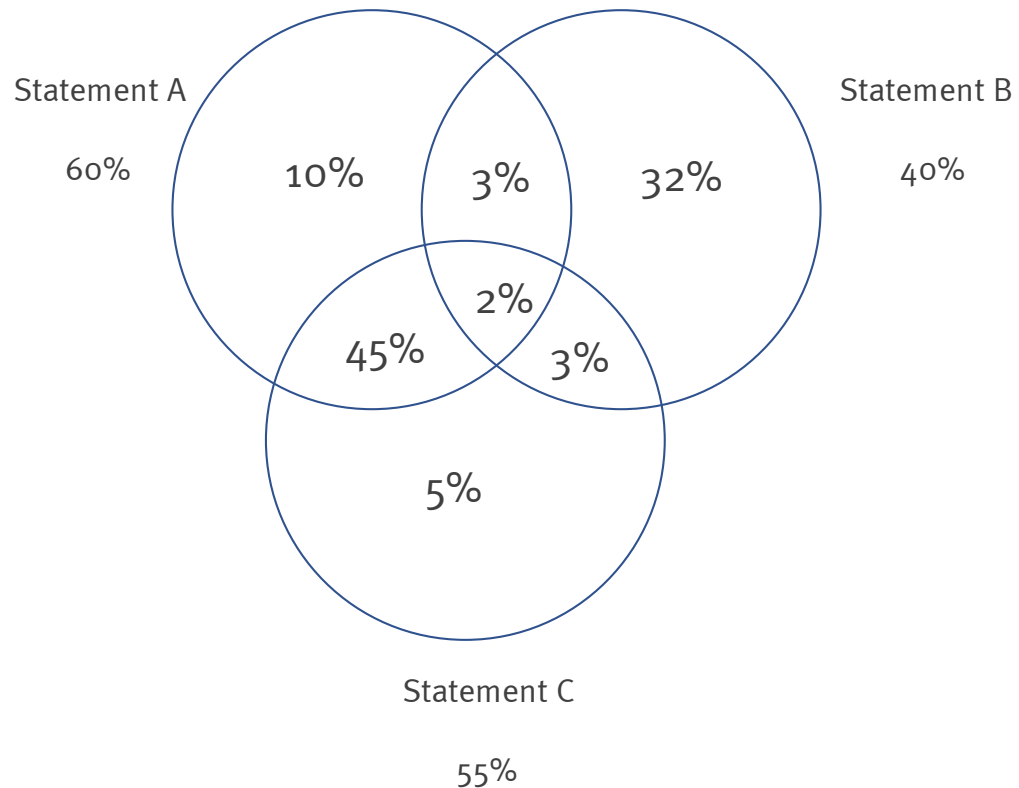
	Every Reason Rider	Exerciser	Joy Rider	Every Reason Consider	Potential Exerciser	Consider For Joy
Free bicycling starter pack	17%	14%	14%	12%	17%	17%
More off-road bicycle riding infrastructure	12%	9%	21%	10%	18%	21%
More on-road bicycle riding infrastructure	12%	12%	11%	10%	8%	8%
Make renting/borrowing bicycles cheaper or easier	10%	11%	5%	10%	5%	8%
Monetary help with buying a bicycle or accessories	8%	6%	8%	24%	10%	14%
Promotion of bicycle riding in workplaces	7%	5%	3%	1%	1%	1%
Rewards, like earning points per km for riding	7%	7%	7%	11%	10%	7%
Good directional signage on bikeways	6%	7%	8%	6%	3%	5%
Social riding groups	6%	4%	5%	1%	6%	4%
Better enforcement of laws protecting riders	5%	8%	7%	7%	13%	10%
Encourage riding a certain number of hours	2%	1%	3%	5%	1%	1%
More community discussion and support	2%	1%	1%	1%	1%	1%
Apps that monitor distance and health metrics	2%	9%	3%	2%	7%	3%
Community bicycle riding festivals	2%	3%	2%	1%	1%	1%
Competitive riding groups	1%	2%	1%	0%	0%	0%

Base: Respondents who currently ride or are considering riding (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551)

Q15 Which of the following would encourage you the MOST to ride a bicycle more often than you do now?

Total Unduplicated Reach Frequency (TURF) Analysis

A TURF analysis was conducted to determine what combination of encouragement initiatives will appeal to the broadest market. An explanation of a TURF analysis is outlined below and the results reported in the following pages. It is important to note that all infrastructure initiatives were removed from the TURF analysis to better understand the best combination of non-infrastructure initiatives.

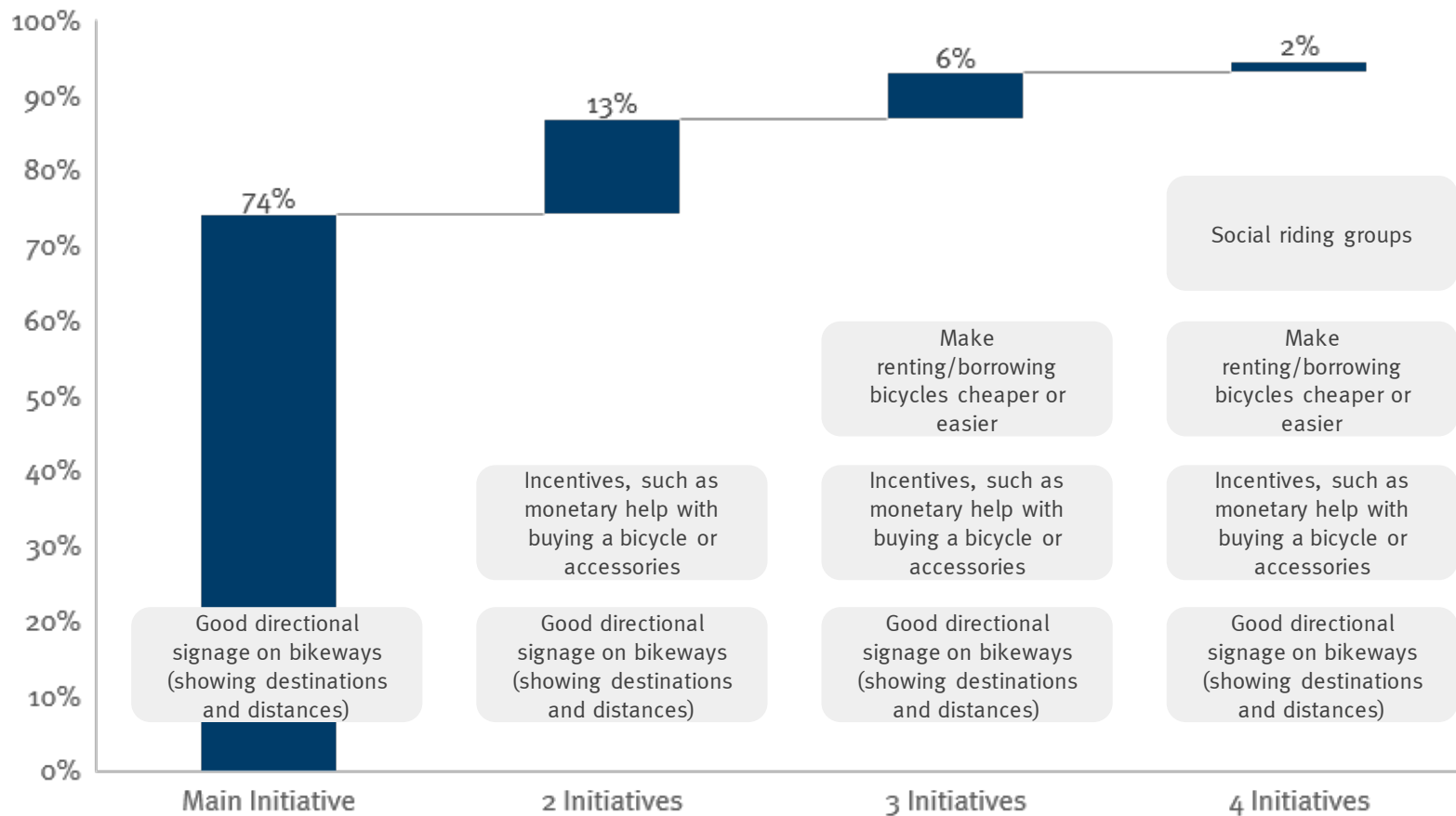


- Statement A and C are mentioned by the most number of respondents
- However when looking at the combinations of these statements we can see that:
 - Respondents who select A and C are essentially the same respondents
 - To reach the maximum number of people we should focus on A and B which has the most reach
→ 60% (A) + 35% (incremental gain from B) = 95%

Encouraging more riding

Every reason riders

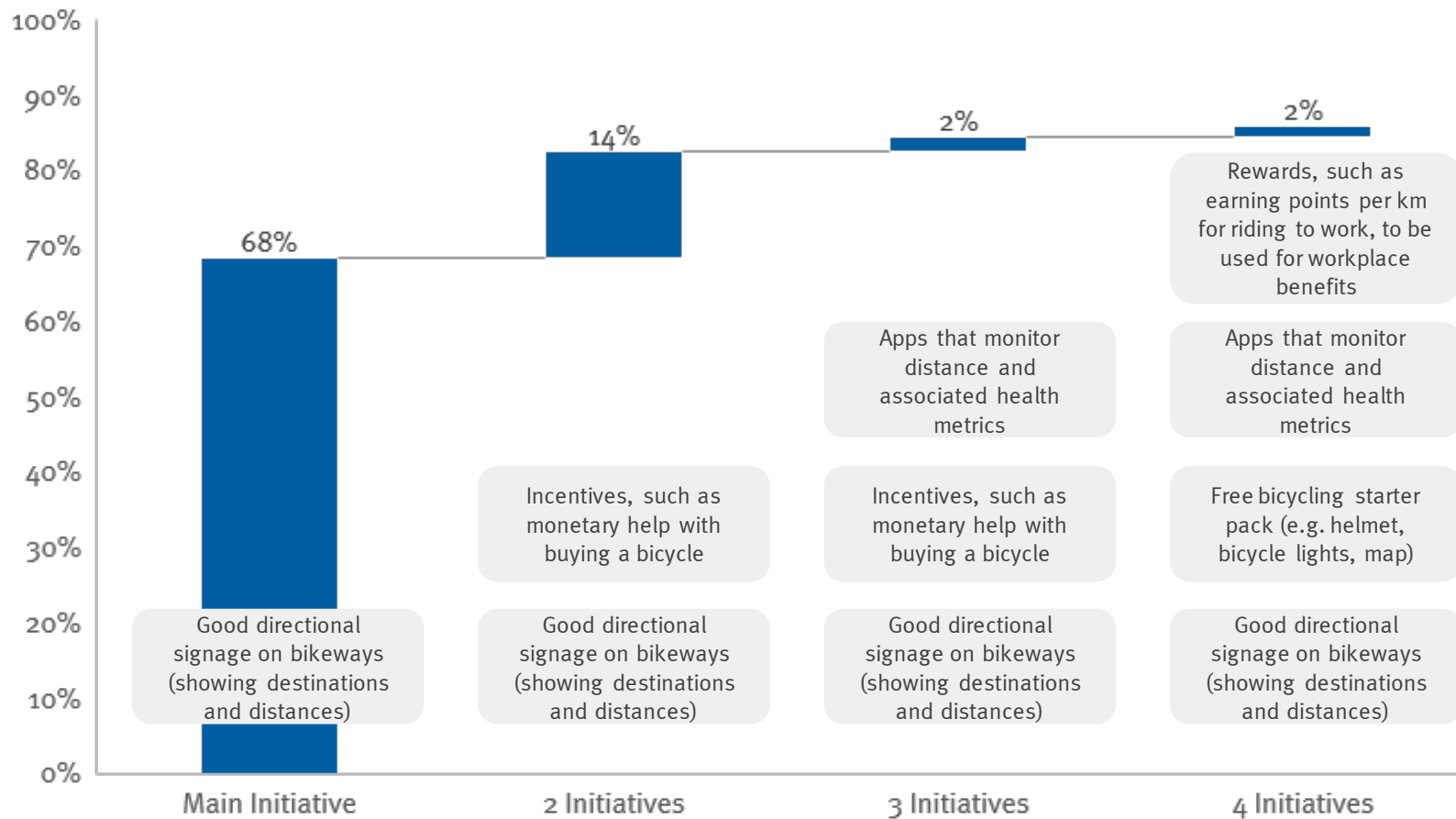
Good directional signage would encourage three in four to ride more often (74%). Beyond this, additional take-up is relatively small, with 13% for monetary incentives, 6% for making renting/borrowing cheaper and easier and 2% for social riding groups. If implementing four initiatives, take-up would be 95%.



Encouraging more riding

Exercisers

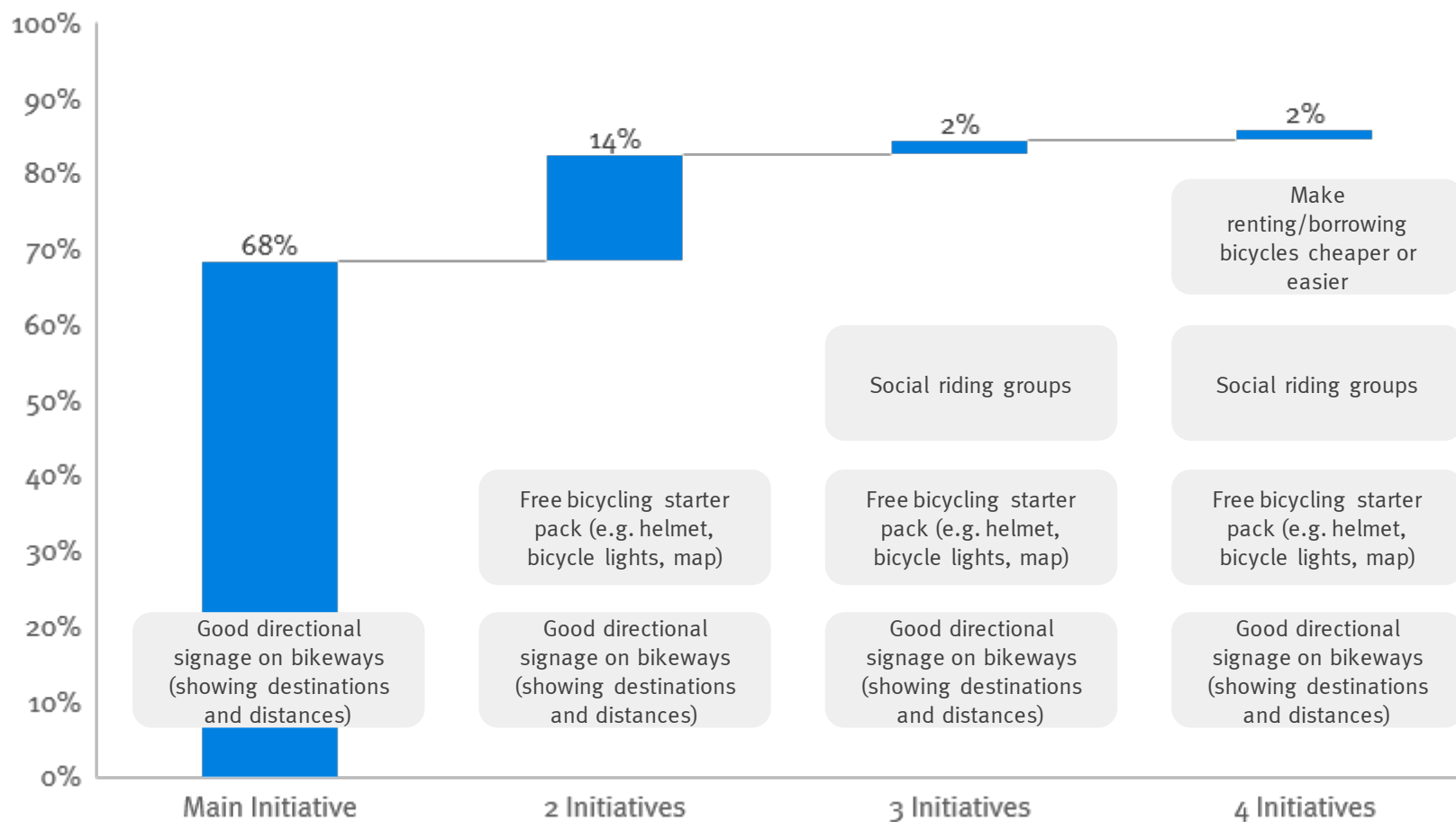
Good directional signage would encourage over two in three to ride more often (68%). Beyond this, additional take-up is relatively small, with 14% for monetary incentives, 2% for health apps and 2% for rewards and a free bicycle starter pack (in place of incentives). If implementing four initiatives, take-up would be 86%.



Encouraging more riding

Joy riders

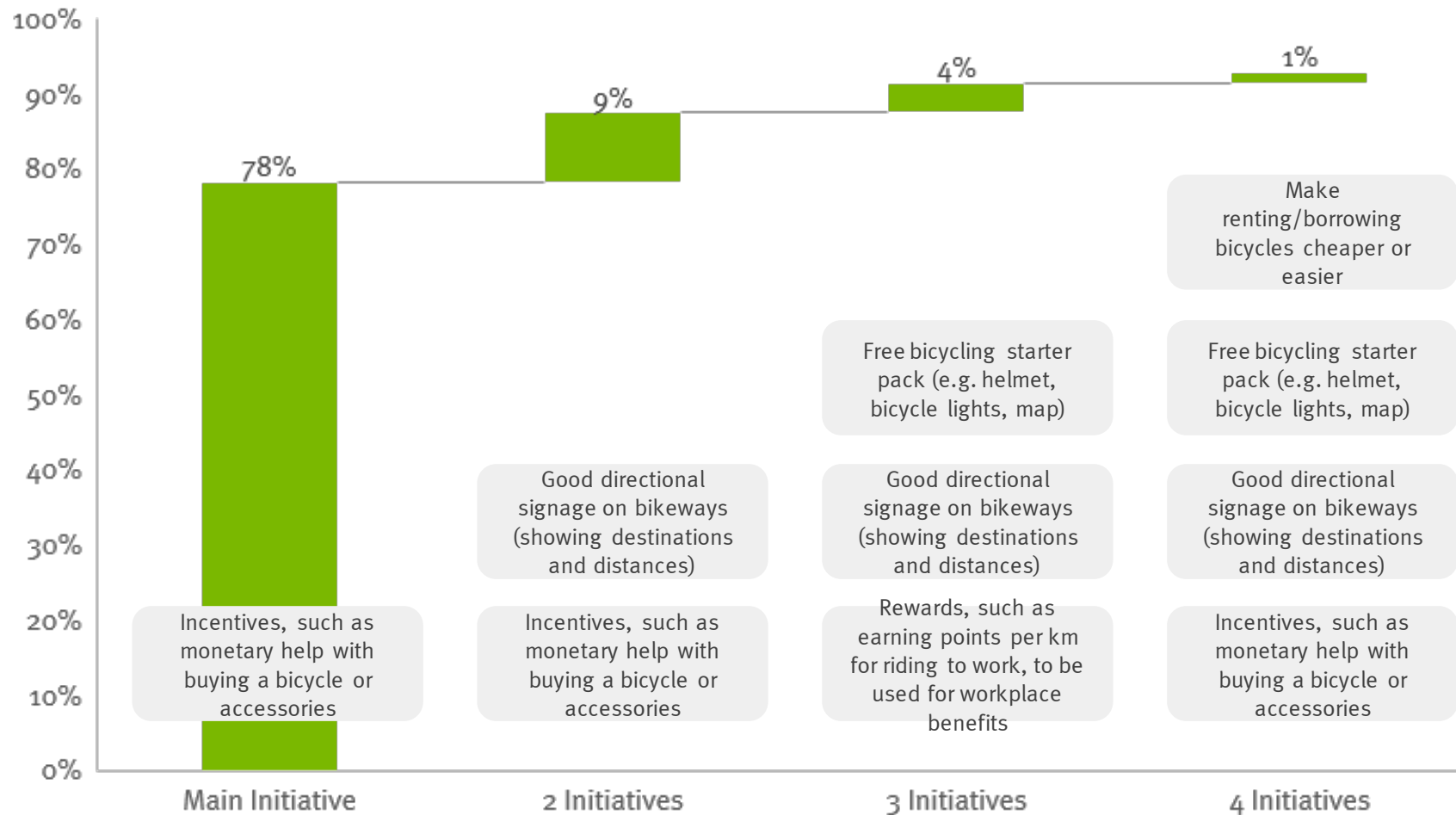
Good directional signage would encourage over two in three to ride more often (68%). Beyond this, additional take-up is relatively small, with 14% for a free bicycle starter pack, 2% for social riding groups and 2% for making renting / borrowing cheaper and easier. If implementing four initiatives, take-up would be 86%.



Encouraging more riding

Every reason considerers

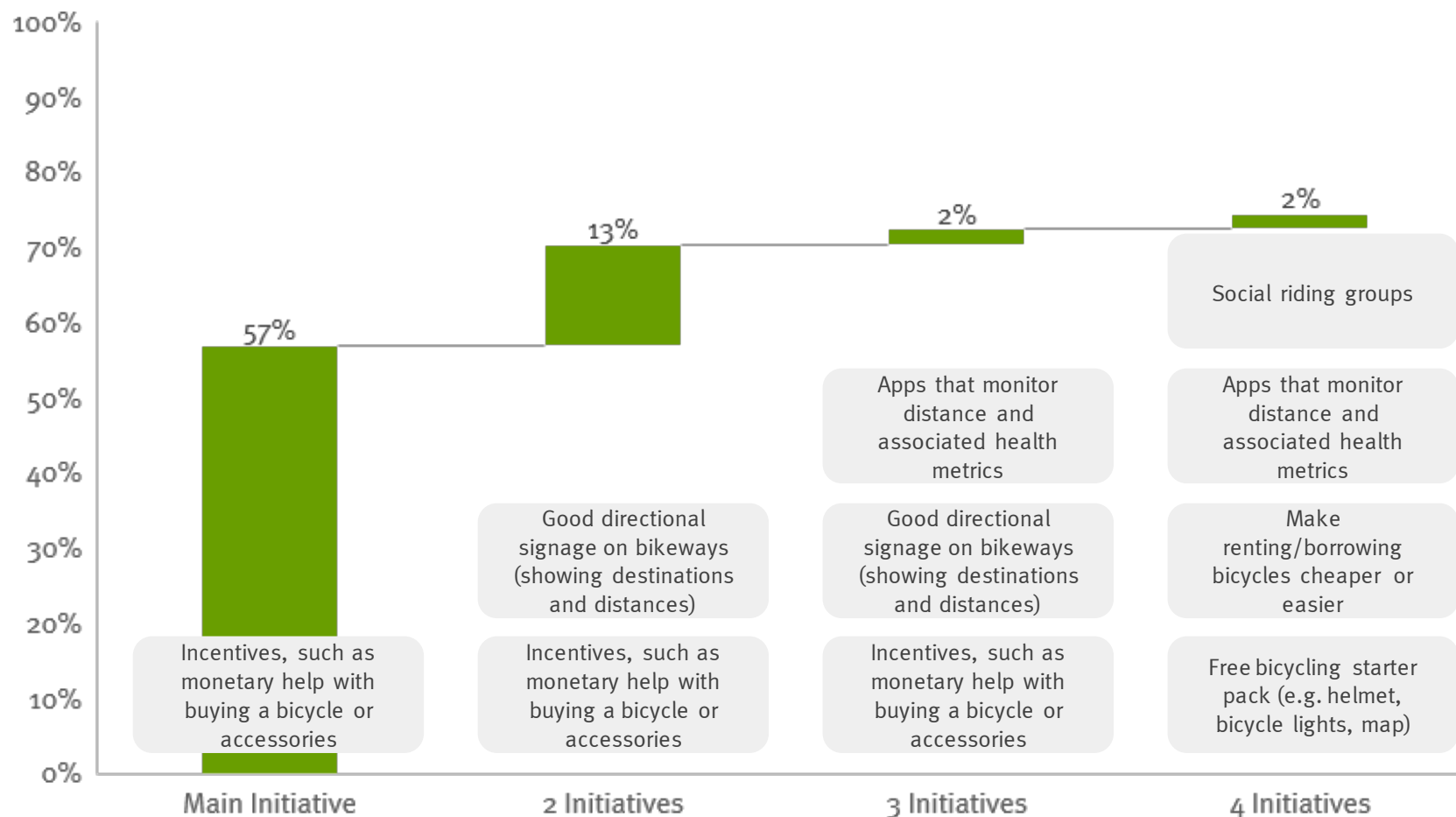
Monetary incentives would encourage over three in four to ride more often (78%). Beyond this, additional take-up is relatively small, with 9% for good directional signage, 4% for rewards and (in place of incentives) and a free bicycle starter pack, and 1% for incentives (in place of rewards) and making renting / borrowing cheaper and easier. If implementing four initiatives, take-up would be 93%.



Encouraging more riding

Potential exerciser

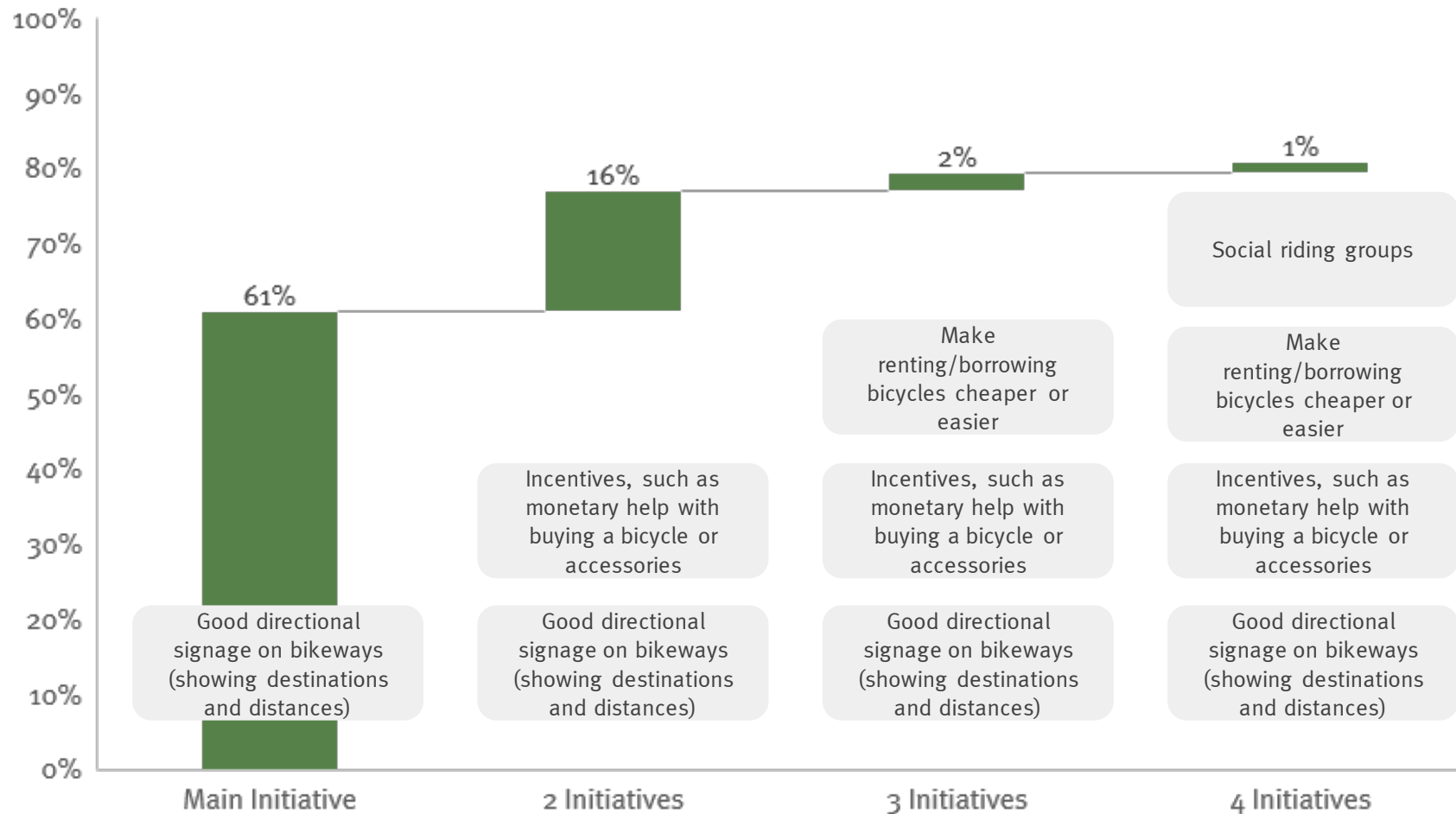
Monetary incentives would encourage over half to ride more often (57%). Beyond this, additional take-up is relatively small, with 13% for good directional signage, 2% for health apps, and 2% for a free bicycle starter pack (in place of incentives), making renting / borrowing cheaper and easier (in place of good directional signage) and social riding groups. If implementing four initiatives, take-up would be 74%, the lowest of all segments.



Encouraging more riding

Considerer for joy

Good directional signage would encourage over three in five to ride more often (61%). Beyond this, additional take-up is relatively small, with 16% for incentives, 2% for making renting / borrowing cheaper and easier and 1% for social riding groups. If implementing four initiatives, take-up would be 81%.



Desired information

Given the desire to mitigate risk and ride in locations sheltered from traffic, it is not surprising that the greatest desire for information is where to find safe bicycle paths and places to ride (42%). Females and those aged 35 to 54 are more likely to desire this information compared with males and those under 35. Further, given some uncertainty surrounding Queensland cyclist and motorist road rules, it is also unsurprising that around two in five desire such information (37%). Those under 35 are interested in available facilities, while those under 35 are interested in riding tips, benefits and how and where to rent/borrow a bicycle. Despite current riding behaviour, Current Riders still desire more information, in particular they want to know about available facilities, bike maintenance, benefits, how and where to rent/borrow a bicycle and workplace support.

	Overall	AGE			GENDER		TYPE		
		Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	Stakeholders
Where to find safe bicycle paths and places to ride	42%	38%	45%	45%	40%	45%	43%	41%	41%
Queensland cyclist and motorist road rules and responsibilities	37%	36%	37%	39%	37%	38%	38%	35%	41%
Available facilities	27%	31%	27%	20%	27%	27%	30%	22%	44%
How to ride safely on the road	27%	28%	26%	26%	23%	32%	27%	26%	21%
How to maintain your bicycle	26%	27%	26%	27%	26%	27%	29%	23%	29%
Bicycle riding tips	24%	27%	21%	21%	23%	24%	24%	22%	23%
The benefits of riding your bicycle	20%	25%	16%	16%	22%	17%	22%	17%	15%
How and where to rent/borrow bicycles	19%	22%	18%	14%	18%	19%	21%	15%	12%
How employers can support riders in the workplace	14%	17%	16%	7%	15%	13%	18%	9%	39%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; Male n=994, Female n=1408; Current Riders n=1509, Considerers n=894; Stakeholders n=788)

Q13 Which of the following information would you like to know about?

Desired information

By segments

All segments have a similar desire for where to find safe bicycle paths and places to ride, suggesting this is a consistent need regardless of riding behaviour. Every Reason Riders have the most desire for available facilities, how and where to rent/borrow bicycles and workplace support. Every Reason Considerers have the most desire for bicycle riding tips. Considerers for Joy have the least desire for almost all information, while Potential Exercisers have the least interest in how to ride safely, how and where to rent/borrow bicycles and workplace support.

	Every Reason Rider	Exerciser	Joy Rider	Every Reason Considerer	Potential Exerciser	Considerer For Joy
Where to find safe bicycle paths and places to ride	46%	35%	42%	45%	36%	40%
Qld cyclist and motorist road rules and responsibilities	41%	32%	37%	46%	26%	32%
Available facilities	37%	22%	26%	32%	21%	18%
How to ride safely on the road	31%	23%	27%	34%	15%	19%
How to maintain your bicycle	31%	22%	25%	35%	24%	22%
Bicycle riding tips	28%	21%	21%	35%	18%	17%
How and where to rent/borrow bicycles	28%	13%	15%	22%	9%	14%
The benefits of riding your bicycle	25%	27%	18%	22%	23%	12%
How employers can support riders in the workplace	21%	13%	15%	12%	6%	8%

Base: Respondents who currently ride or are considering riding (Every Reason Rider n=537, Exerciser n=148, Joy Rider n=824, Every Reason Considerer n=214, Potential Exerciser n=129, Considerer for Joy n=551)

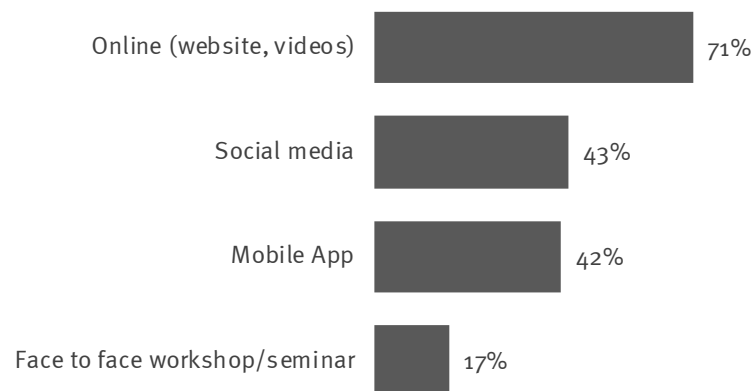
Q13 Which of the following information would you like to know about?

Preferred information channels

Seven in ten would prefer to receive information online via a website / video format. Females and those over 35 have a preference for this format.

Over two in five have a preference for social media and a mobile application. Those below 54 prefer this format, suggesting that while those 35 to 54 are interested in all aforementioned channels, older individuals are partial to websites and younger individuals are partial to mobile applications.

Further, while Considerers are more likely to prefer online, Current Riders have a greater preference for social media and workshop/seminars.



	AGE			GENDER		TYPE		
	Under 35	35 to 54	55+	Male	Female	Current Riders	Considerers	Stakeholders
Online (website, videos)	66%	74%	78%	69%	74%	68%	76%	79%
Social media	58%	39%	20%	40%	48%	47%	37%	57%
Mobile App	48%	43%	27%	41%	43%	43%	38%	44%
Face to face workshop/seminar	17%	15%	18%	18%	14%	20%	10%	29%

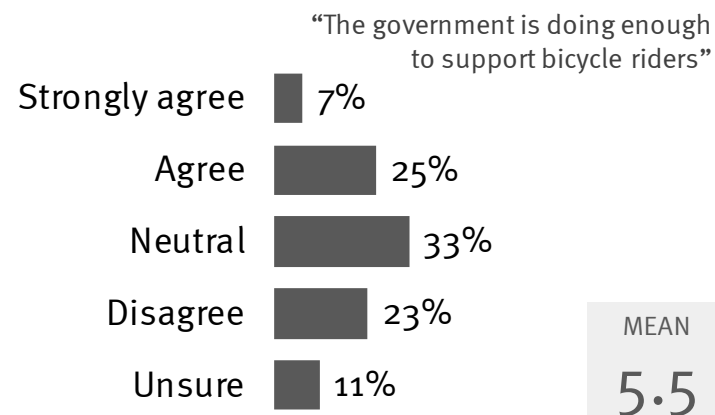
Base: Respondents who would like to know more information (n=1653; Under 35 n=451, 35 to 54 n=658, 55+ n=524; Male n=685, Female n=968; Current Riders n=1103, Considerers n=550; Stakeholders n=585)

QL4 How would you prefer this information be available?

Government support

Overall, there is neutral agreement that the government is doing enough to support bicycle riders (5.5/10), with around one in three (32%) agreeing or strongly agreeing with this statement.

While Current Riders are more likely to agree or strongly agree, those from ROQ are more likely to disagree or be unsure.



	AGE			REGION		TYPE		
	Under 35	35 to 54	55+	SEQ	ROQ	Current Riders	Considerers	Stakeholders
Strongly agree	8%	8%	7%	8%	7%	8%	6%	2%
Agree	27%	24%	24%	28%	20%	28%	22%	16%
Neutral	33%	31%	34%	33%	31%	33%	32%	26%
Disagree	22%	24%	23%	21%	28%	24%	22%	55%
Unsure	10%	13%	12%	10%	14%	7%	18%	2%
MEAN	5.6	5.4	5.4	5.7	5.1	5.6	5.4	3.9

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894; Stakeholders n=788)

Q16 Do you agree that the Government is doing enough to support bicycle riders?

Part 13 - Demographics

General travel

Current Riders and those below 54 are more likely to ride a bike to / from work, recreation activities, friend and family visits and university. While Current Riders and those under 54 are more likely to ride a bike to / from the shops, Considerers are also likely to do this. Those from ROQ are more likely to ride a bike to / from the shops and friend and family visits.

		Overall	AGE			REGION		TYPE			Stakeholders
			Under 35	35 to 54	55+	SEQ	ROQ	Current Riders	Considerers	Rejecters	
To/from work	Private vehicle	53%	60%	67%	33%	52%	55%	60%	54%	42%	47%
	Public transport	16%	26%	17%	6%	20%	8%	22%	14%	10%	19%
	Ride a bicycle	4%	9%	3%	0%	4%	4%	9%	1%	0%	51%
	Walking	9%	14%	9%	4%	10%	6%	13%	8%	4%	8%
To/from recreation/social activities	Private vehicle	85%	76%	89%	90%	84%	86%	80%	88%	88%	77%
	Public transport	20%	30%	18%	13%	24%	11%	26%	18%	14%	16%
	Ride a bicycle	6%	10%	6%	3%	6%	6%	14%	1%	0%	60%
	Walking	19%	27%	19%	12%	19%	20%	28%	16%	10%	25%
To/from the shops	Private vehicle	87%	77%	90%	94%	86%	89%	81%	91%	92%	84%
	Public transport	12%	20%	10%	7%	14%	8%	16%	12%	7%	4%
	Ride a bicycle	6%	10%	6%	2%	5%	8%	14%	1%	0%	36%
	Walking	26%	35%	27%	16%	27%	22%	36%	22%	16%	31%
To/from friends/family visits	Private vehicle	89%	82%	92%	94%	89%	91%	85%	92%	92%	91%
	Public transport	14%	23%	10%	7%	15%	10%	19%	11%	8%	7%
	Ride a bicycle	5%	10%	4%	1%	5%	6%	12%	1%	0%	34%
	Walking	14%	23%	13%	7%	14%	15%	22%	11%	8%	19%
To/from University/College	Private vehicle	17%	30%	15%	7%	18%	16%	24%	15%	10%	13%
	Public transport	10%	23%	5%	1%	12%	4%	14%	10%	4%	5%
	Ride a bicycle	2%	5%	2%	0%	3%	2%	5%	1%	0%	10%
	Walking	6%	13%	2%	1%	5%	6%	10%	3%	1%	3%

Base: Respondents who currently ride or are considering riding (n=2403; Under 35 n=625, 35 to 54 n=953, 55+ n=798; SEQ n=1812, ROQ n=591; Current Riders n=1509, Considerers n=894; Stakeholders n=788)

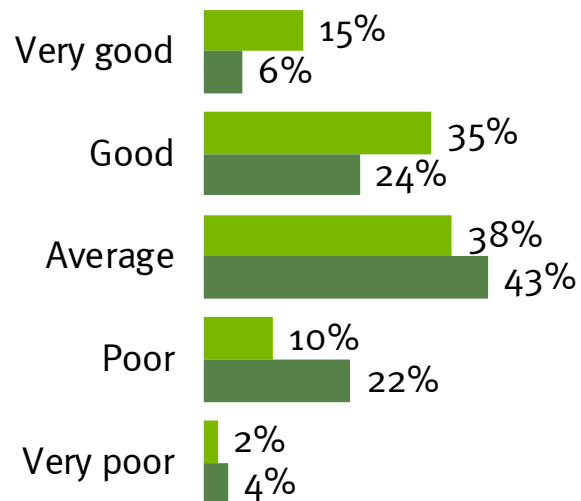
QA1 How do you usually travel for each of the following activities?

Segment demographics

% WHO HAVE DRIVERS LICENCE

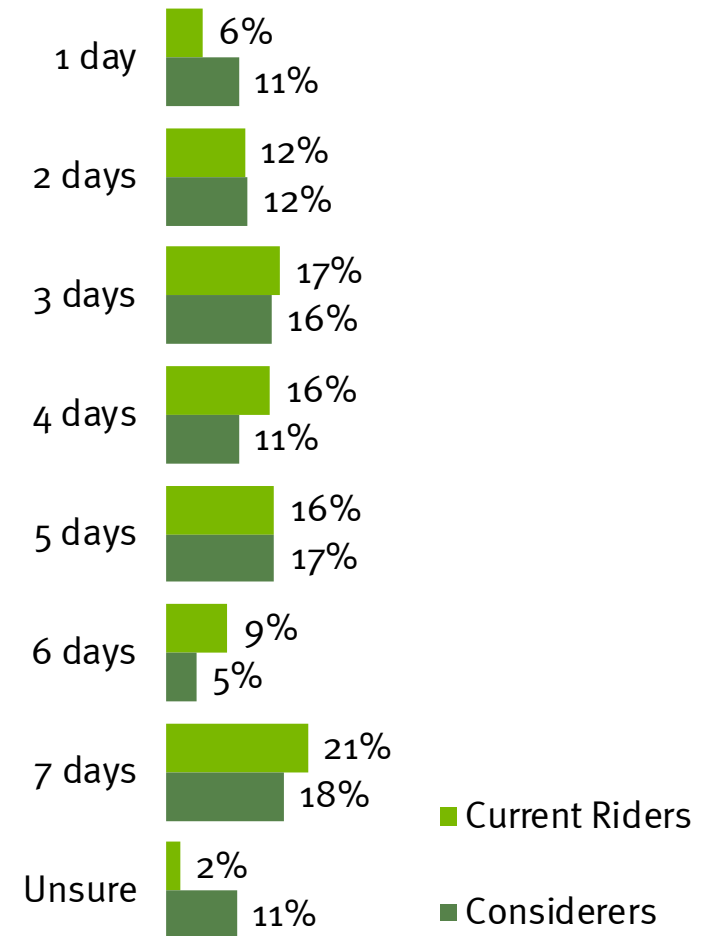


PERCEIVED PHYSICAL FITNESS



DAYS OF PHYSICALLY ACTIVE PER WEEK

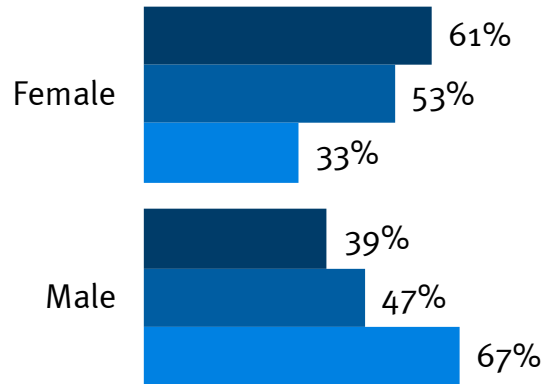
[AT LEAST 30 MINUTES]



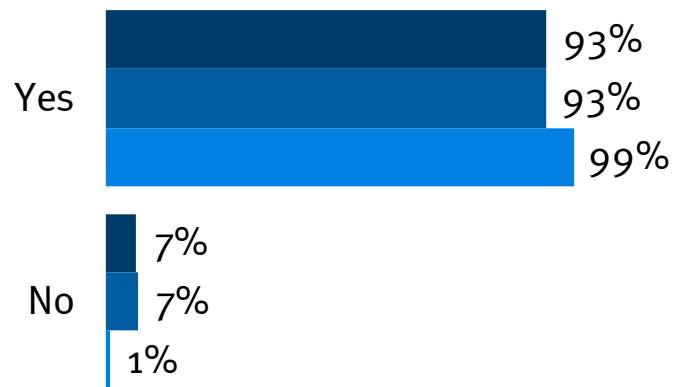
Base: Current Riders n=1509, Considerers n=894)

Demographics (1)

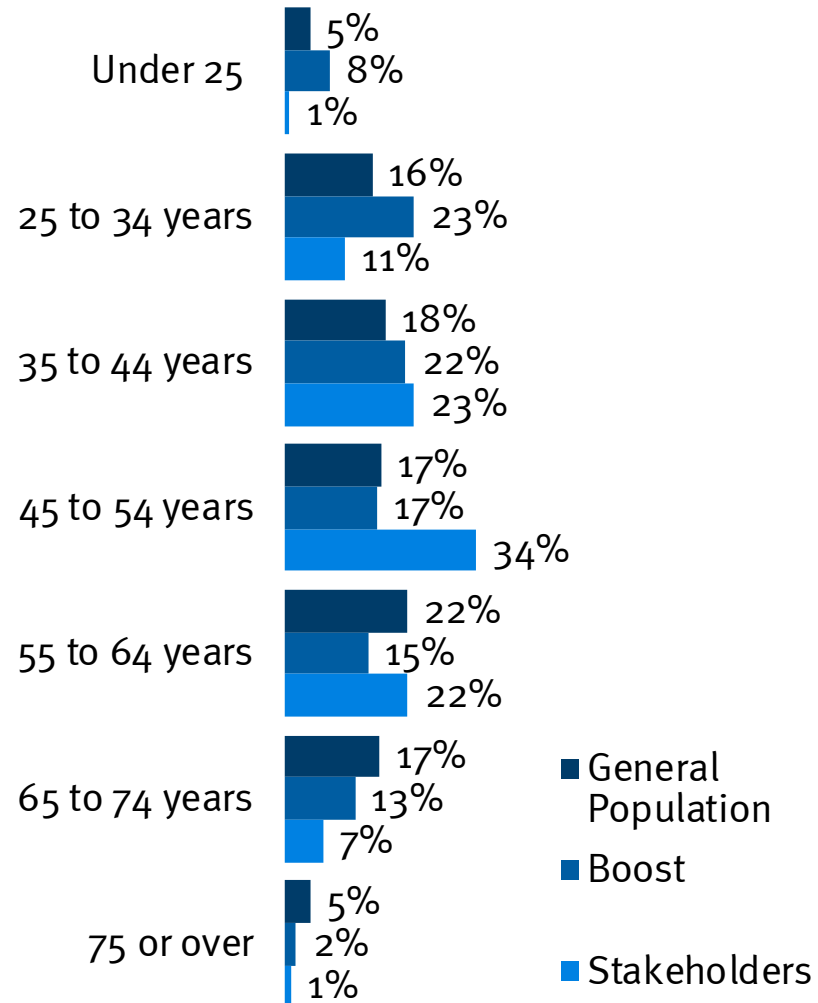
GENDER



DRIVERS LICENCE

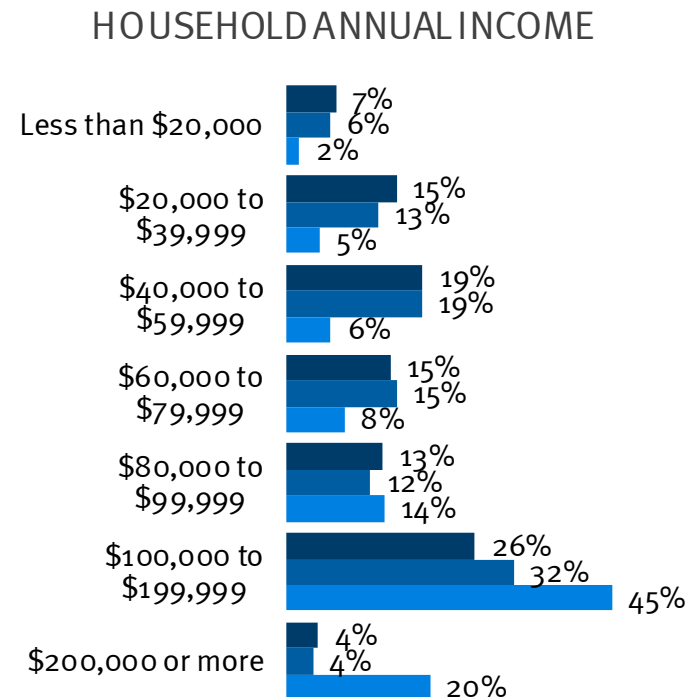
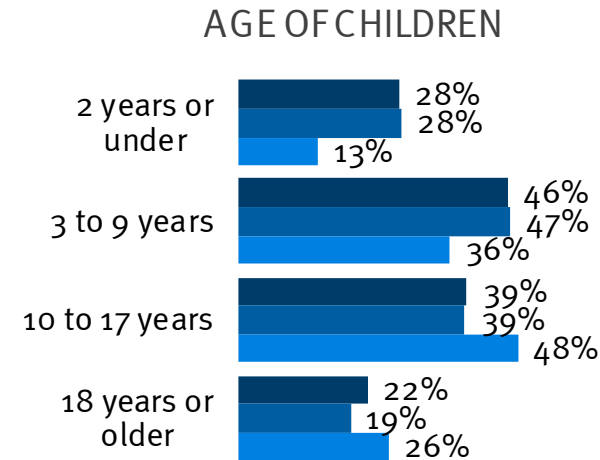
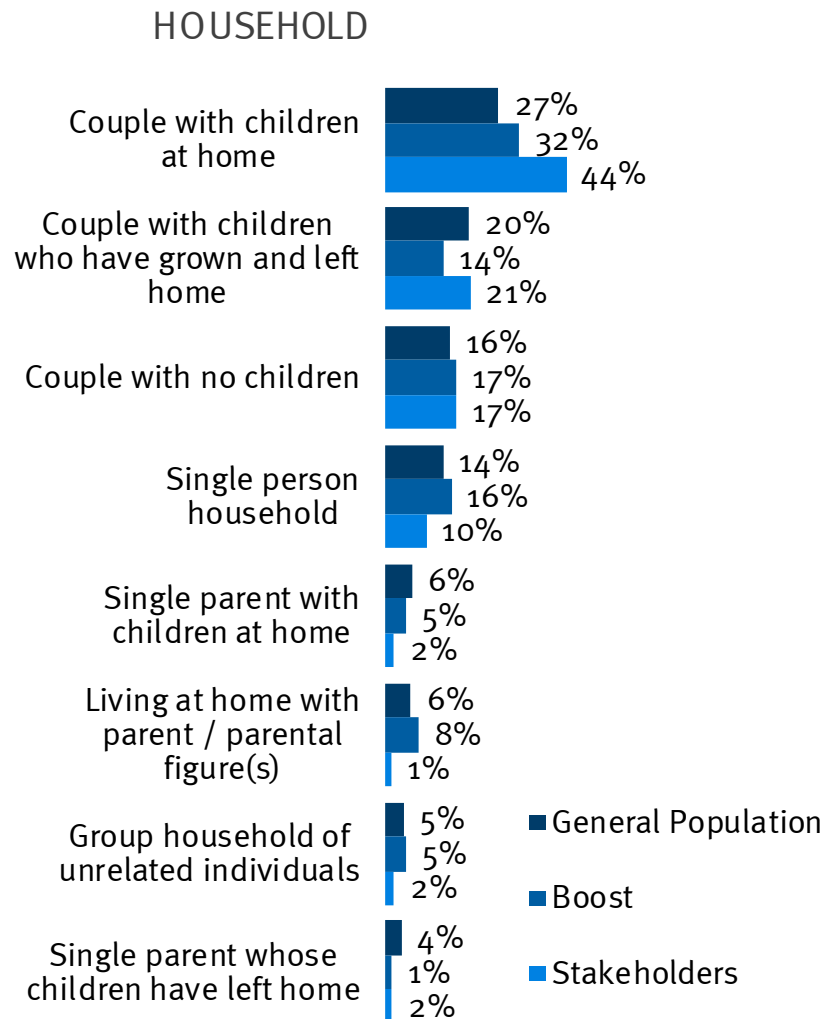


AGE



Base: All respondents (General Population n=3147, Boost n=411, Stakeholders n=794)

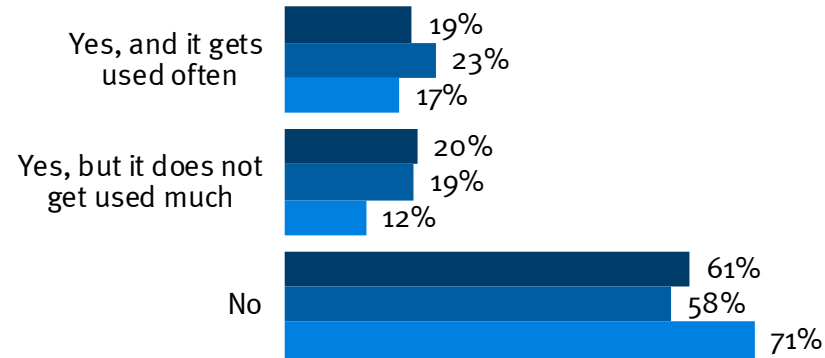
Demographics (2)



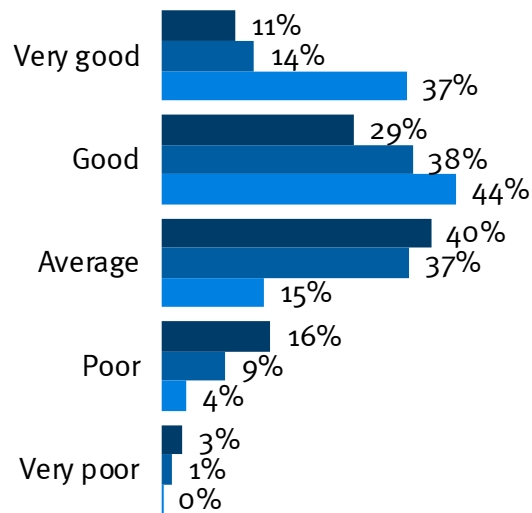
Base: All respondents (General Population n=3147, Boost n=411, Stakeholders n=794)

Demographics (3)

EXERCISE BICYCLE OWNERSHIP

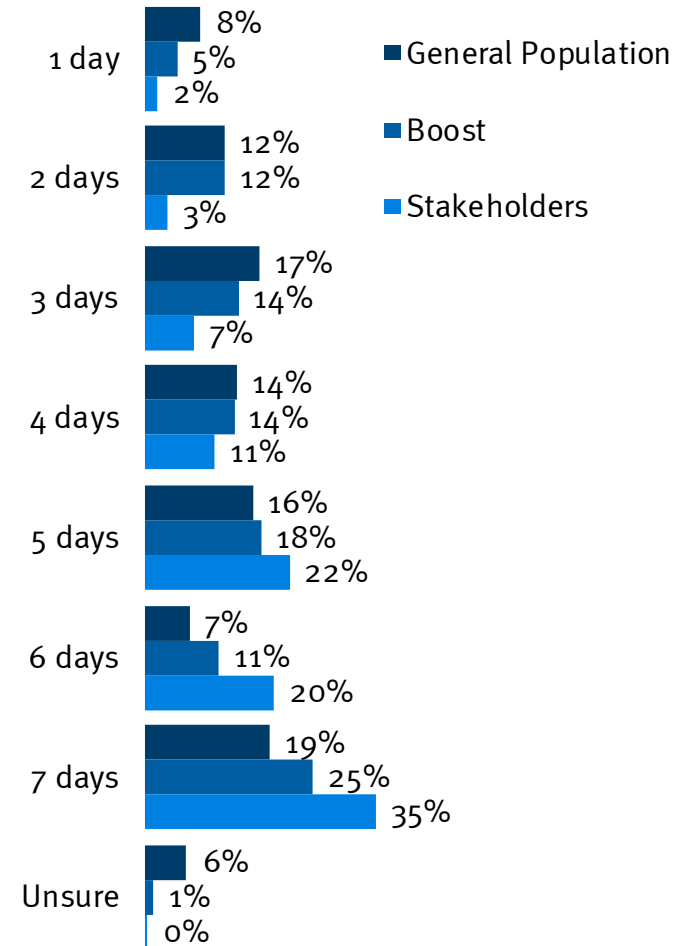


PERCEIVED PHYSICAL FITNESS



DAYS OF PHYSICALLY ACTIVE PER WEEK

[AT LEAST 30 MINUTES]



Base: All respondents (General Population n=3147, Boost n=411, Stakeholders n=794)



To find out more about bike riding
in Queensland, please visit
www.tmr.qld.gov.au/cycling