

RESEARCH SUMMARY

Title Attitudes towards Cycling Market Segmentation Summary

Objective Describes the propensity of Londoners to cycle at present and how amenable they are to cycling in future

Date November 2014 **Agency:** SPA

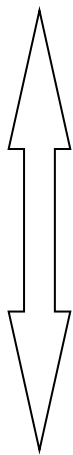
Methodology Segmentation Analysis

Key findings

Londoners fall into a range of categories in terms of their likelihood to cycle: it is not nearly as simple as dividing people into cyclists and non-cyclists. This segmentation work indicates that while there is a significant group who are extremely unlikely to cycle, these 'rejectors' are in fact a minority and the majority of people have the potential to cycle.

In terms of this segmentation, two thirds of the population falls into the broadly positive groups and a third the harder to interest segments, with only 14% being in groups which might be characterised as being rejectors (older age being one of the key reasons for rejection, along with attitudinal factors).

However, even amongst those segments which have the greatest potential to cycle, actual current conversion is low. This means that it makes sense to target these pro-cycling segments, which can be expected to be the easier to convert than those with a lower propensity. Note that once the majority of those in the high propensity segments have been converted to cycling it will then be appropriate to target the less positive segments.

Segment	Description	% Londoners	Most likely
Urban living	Young, well educated, reasonably well-off and usually live in town/city centre. Many choose to live without a car.	23%	
Young couples and families	Young, with relatively low car ownership and young children. Often tight finances, ethnic background may present a barrier to cycling.	17%	
High earning professional	Well educated, affluent, often working in multinationals. Tend to use personal rather than public transport.	15%	
Suburban lifestyle	Average income, heavily reliant on car and living in suburbia. Cycling for leisure is as likely as cycling for purpose.	17%	
Hard pressed families	Difficult family finances, and often living in inner city flats and tower blocks. Ethnic background may present a barrier to cycling.	21%	
Manual trades	Mainly white with high car ownership, this segment is unlikely to cycle with generally negative attitudes towards cycling.	5%	
Comfortable maturity	Older and retired people, reasonably well off, living in suburban areas - some potential for off-road leisure cycling.	8%	

Job number: 05110