

Attitudes towards cycling  
Annual report 2012  
TfL number: 05110  
v1.0





# Introduction

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- The Mayor of London and Transport for London (TfL) have a target to increase cycling from its 2001 level of 2% to 5% by 2026. This equates to a 400% increase compared to 2000 levels
- “Attitudes towards Cycling” has been conducted since 2005 to assess cycling activity and attitudes amongst Londoners
- The results shown here are from the March 2012 survey which comprised 1,326 telephone interviews with adult Londoners. Data are weighted to represent the London population in terms of age, gender, ethnicity, working status and location (inner/outer London)
- Traditionally 1,000 interviews have been conducted. This year an additional boost of cyclists was included in order to deliver more robust results for this key group

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# Reporting note

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- Since June 2010 there has been a change in how cyclists and non-cyclists are categorised. All previous data shown here have been amended to reflect this change in definition and therefore slight differences with previous reports will be seen. There is a table showing how the definitions have been changed on the next slide of this report
- Research conducted into cycling is affected by seasonality as the summer months see a greater level of cycling than other seasons. This should be borne in mind when interpreting findings
- Throughout this report, data from 2012 are compared with last year's figures. Statistically significant differences with 2011 are shown as follows:

 **Significantly lower than March 2011**

 **Significantly higher than March 2011**



# Change in definition of cyclists from pre- to post-July 2010

	Previous definition	Current definition
Cyclist	Cycled in the past year	Cycled, even if not in the last year, but does say they use a bicycle to get around London
Regular cyclist	All who cycle at least 3 times per week	All who cycle at least once a week
Occasional cyclist	Cycle at least once a month, less often than three times a week	Cycle at least once in the last year, less often than once a week
Non-cyclist	Never cycles, or not in the last year	Never cycles

Note: the figures from previous waves have been re-calculated in this report meaning that year-on-year comparisons are valid



# Summary

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# Summary

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## The picture of cycling

- 18% of Londoners now cycle, and this figure has remained largely unchanged since monitoring began
- Scope remains for more Londoners to take up cycling. 50% of Londoners have access to a bicycle in their household and almost nine out of ten know how to ride a bike. A quarter of Londoners say that they could (but do not currently) commute by bike
- Both cyclists and non-cyclists say that if they started cycling, or cycled more, these cycling trips would be instead of bus and car journeys



# Behaviour that lies behind choosing to cycle

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- TfL has developed a behaviour change model to assess cyclists' and non-cyclists' propensity to increase their level of cycling
- Current cyclists are most likely to be 'normalised' to cycling more (33% are in this category), meaning they are already 'cycling more, and will continue to do so'. There has been no significant change in this since this time last year
- Most non-cyclists (77%) are 'pre-primed' meaning they 'would not consider taking up cycling', 'have never thought about taking up cycling' or 'have given taking up cycling some thought but are not going to do so', or 'were doing this, but couldn't stick to it'. Due to changes in the classification of responses, this percentage is higher than in previous waves, although the overall pattern of response to the question has remained steady
- A quarter (22%) are 'primed' to take up cycling (meaning they are 'thinking about it', or 'have decided to do it')

# → Motivators and deterrents

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- For both current cyclists and non-cyclists, there are similar motivators and barriers to cycling more/taking up cycling
- Increased fitness continues to be the main motivator, with saving time and money also driving interest in (more) cycling. Concern about safety is the most commonly mentioned deterrent to increasing/taking up cycling
- More than half of cyclists rate the security of their bike when left unattended as poor or very poor
- There has been some positive change in perceived barriers – there has been an increase in the proportion of cyclists to rate the availability of information on cycle routes, and of cycle racks/stands, as good. However, there is still room for further work in both of these areas – particularly the provision of cycle racks with just 37% of cyclists rating this as good in London (up from 27% in 2011)
- For non-cyclists, cycling remains a relatively unappealing mode of transport – the least appealing of the major modes





# Attitudes towards cycling

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- Amongst both regular and occasional cyclists\*, trips within the local area are thought to be more appealing than journeys outside the local area and within central London
- There has been little movement in various attitudes towards cycling since October 2010
- Many of the attitudes are positive, such as the view that cycling is becoming more popular and that it is a convenient and interesting way to travel. However, the perception that cyclists are vulnerable to other road users and that traffic makes people afraid of cycling is still common

\* 'regular cyclists' are defined as those cycling at least once a week; occasional cyclists cycle less often



# Barclays Cycle Hire

- Since its launch, awareness of Barclays Cycle Hire has risen dramatically, though awareness has fallen since 2011 amongst non-cyclists
- A small proportion of Londoners have used the scheme (7%) though three in ten non-users say they are likely to make use of the scheme in the future
- There is strong evidence that Barclays Cycle Hire has increased users' levels of cycling – a quarter of users say their cycling has increased 'a lot' because of the scheme, and a further third report that it has increased 'a little'
- More than half of users are aware of the eastern expansion area, and more than a third of current non-users say they would use Barclays Cycle Hire if it were available in their area





# Barclays Cycle Superhighways

- Four Barclays Cycle Superhighways are now in operation to provide routes for cyclists travelling into central London
- Two fifths of Londoners are aware of Barclays Cycle Superhighways, rising to more than half of cyclists. Awareness has remained level this year compared with last
- One in ten Londoners aware of the routes have used them, and a further fifth are aware and plan to do so
- A fifth of users say that the Barclays Cycle Superhighways contributed to an increase in their cycling
- Awareness of the full extent of plans for the Barclays Cycle Superhighways is relatively low – just a quarter of those aware of them at all know about the plans for further routes





# Investment in cycling

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- Half of Londoners believe that the amount of effort being put in to helping people cycle in London is about right
- However, where a contrary opinion is expressed, the proportion thinking that too little is being done (32%) is almost three times higher than the proportion saying that too much is being done (11%)
- Men, inner Londoners and cyclists (there is some cross over between these groups) are most likely to think that more needs to be done to help people cycle around London

## Greenways

- Half of Londoners have heard of London's Greenways and a fifth have used one
  - Cyclists are more likely to have heard of, and used, a Greenway



# Cycle crime

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- There are high perceptions of cycle crime: two thirds of cyclists think there is a lot of cycle crime in London (particularly regular cyclists) and two fifths say that concerns about bike theft put them off cycling more
- Most cyclists have heard or read about cycle thefts or collisions in the media
- Only 17% of cyclists say that the security of their bike when left unattended is good or very good, compared with 58% saying it is bad or very bad
- Cyclists feel most at risk of crime when cycling at night and in central London rather than in their local area
  - Almost half of cyclists change their route when travelling after dark
- A quarter of cyclists have experienced bike crime (either a whole bike or part of one) in the last couple of years
  - Many do not report the incident to the police
- Half of cycle theft victims say they still cycle as much as they did before the experience, but a fifth cycle less, and three in ten stopped cycling



# Profile of cyclists

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# Profile of cyclists by frequency of cycling

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- 18% of Londoners cycle\*; this figure is not significantly different from any previous wave of this research
- Of those who do cycle, 60% do so regularly (at least once a week), while 40% are occasional cyclists (less often)
  - The proportion of cyclists identifying themselves as regular cyclists is slightly – but not significantly – lower than seen last year (when the figure was 68%)
- Around a quarter of cyclists (23%) use their bike at least five days a week
- There has been very little change in the frequency with which both regular and occasional cyclist report using their bicycles

\* This includes all those who say they cycle, ie not those who say they 'never' cycle



# Potential for increasing cycling

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- There remains considerable scope for increasing the incidence of cycling: half of Londoners have access to a bike in their household, and 86% know how to ride one. Younger Londoners, males, and those in employment are more likely than other groups both to own and to know how to ride a bike
- 8% of Londoners commute by bicycle at present, remaining unchanged since 2011. 82% of these commute by bike at least once a week
- A quarter (26%) of Londoners could commute by bike but don't currently

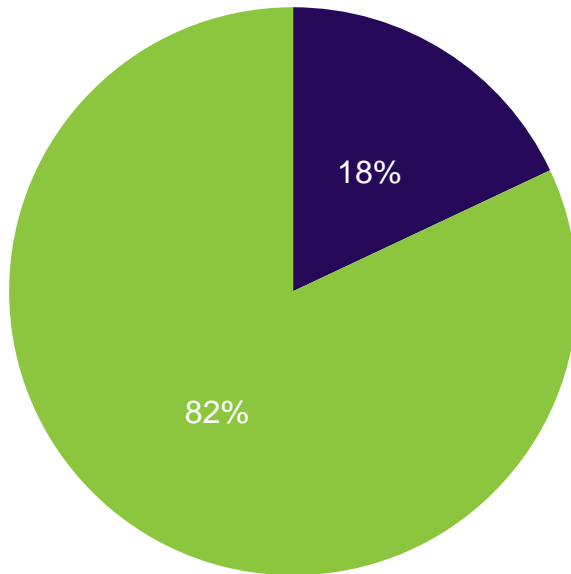




# 18% of Londoners cycle; 60% of these cycle at least once a week

## Cyclists and non-cyclists

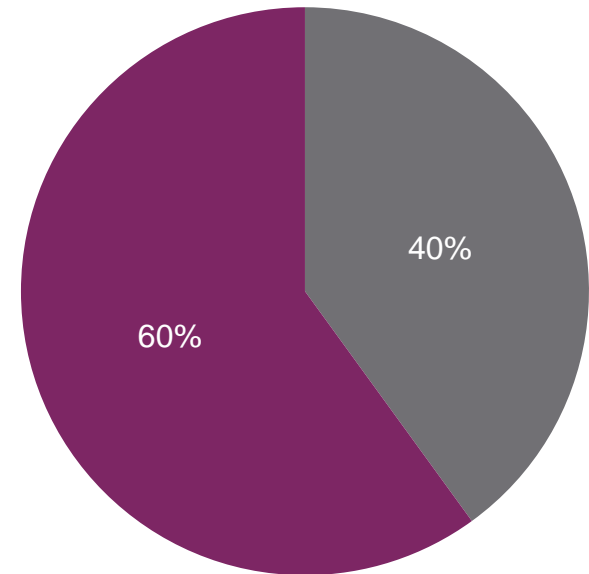
■ Cyclist      ■ Non-cyclist



**Cyclists are those who sometimes use a bike to get around London. Non-cyclists never use a bike to get around London**

## Breakdown of regular and occasional cyclists

■ Occasional cyclist      ■ Regular cyclist



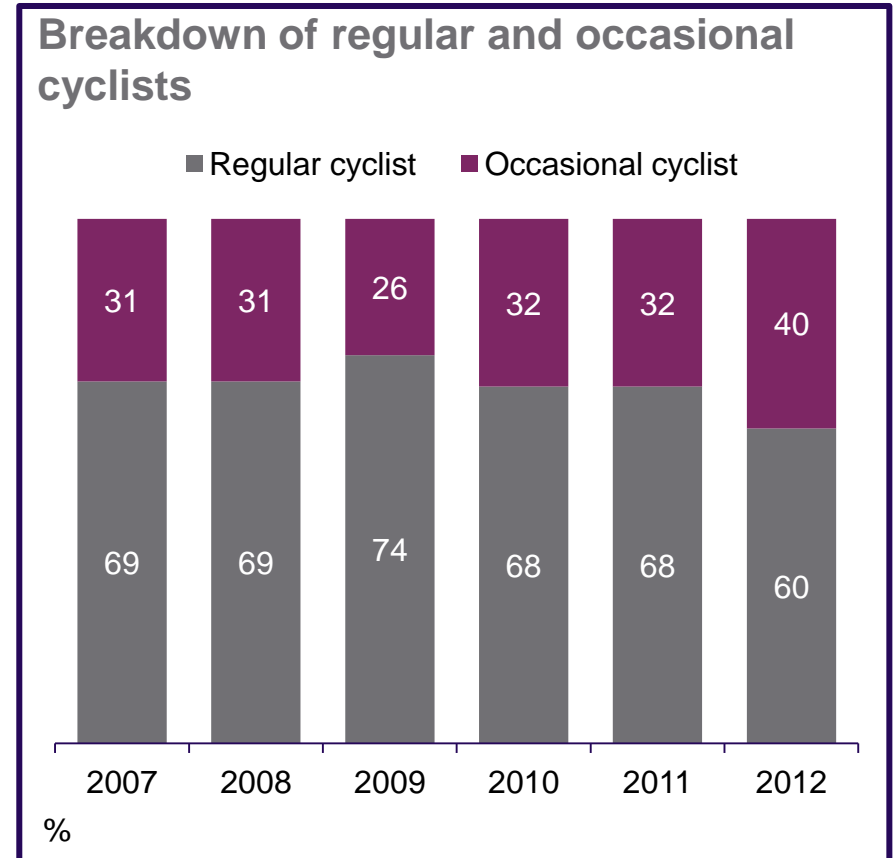
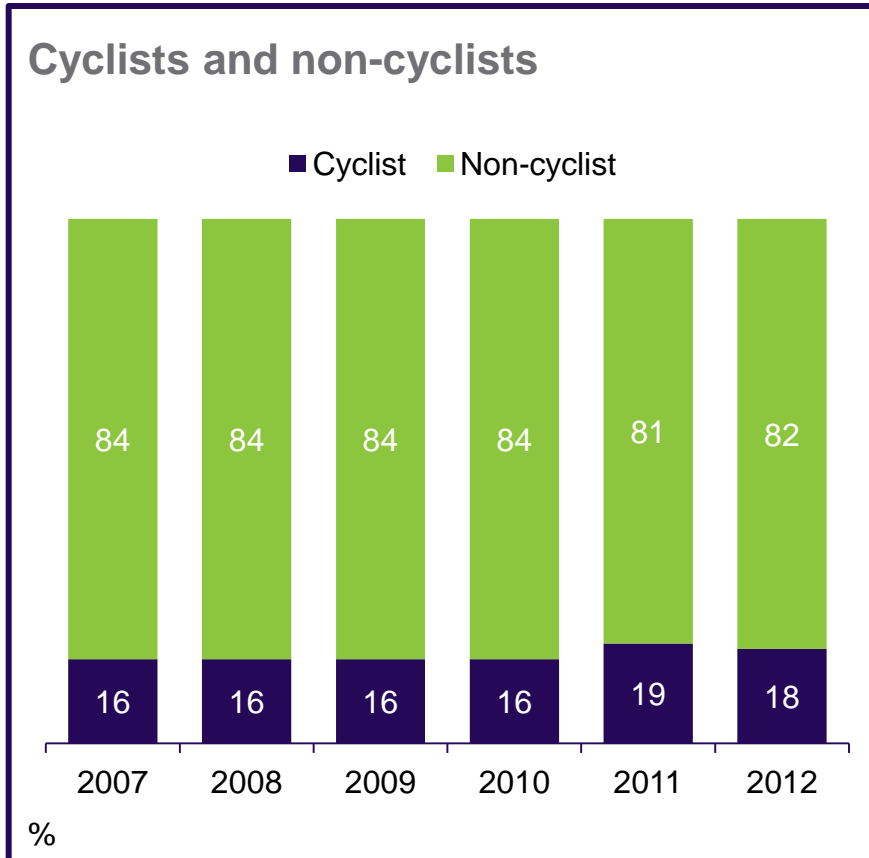
**Regular cyclists are defined as cycling at least once a week. Occasional cyclists cycle less often than once a week**

*QFREQ: Which of these modes of transport do you ever use to get around London? Base: all (1,326) QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London? Base: All cyclists (508)*



The level of cycling is the same now as this time last year; the proportion of cyclists who do so 'regularly' is slightly but not significantly lower than in 2011

## Profile of cycling over time



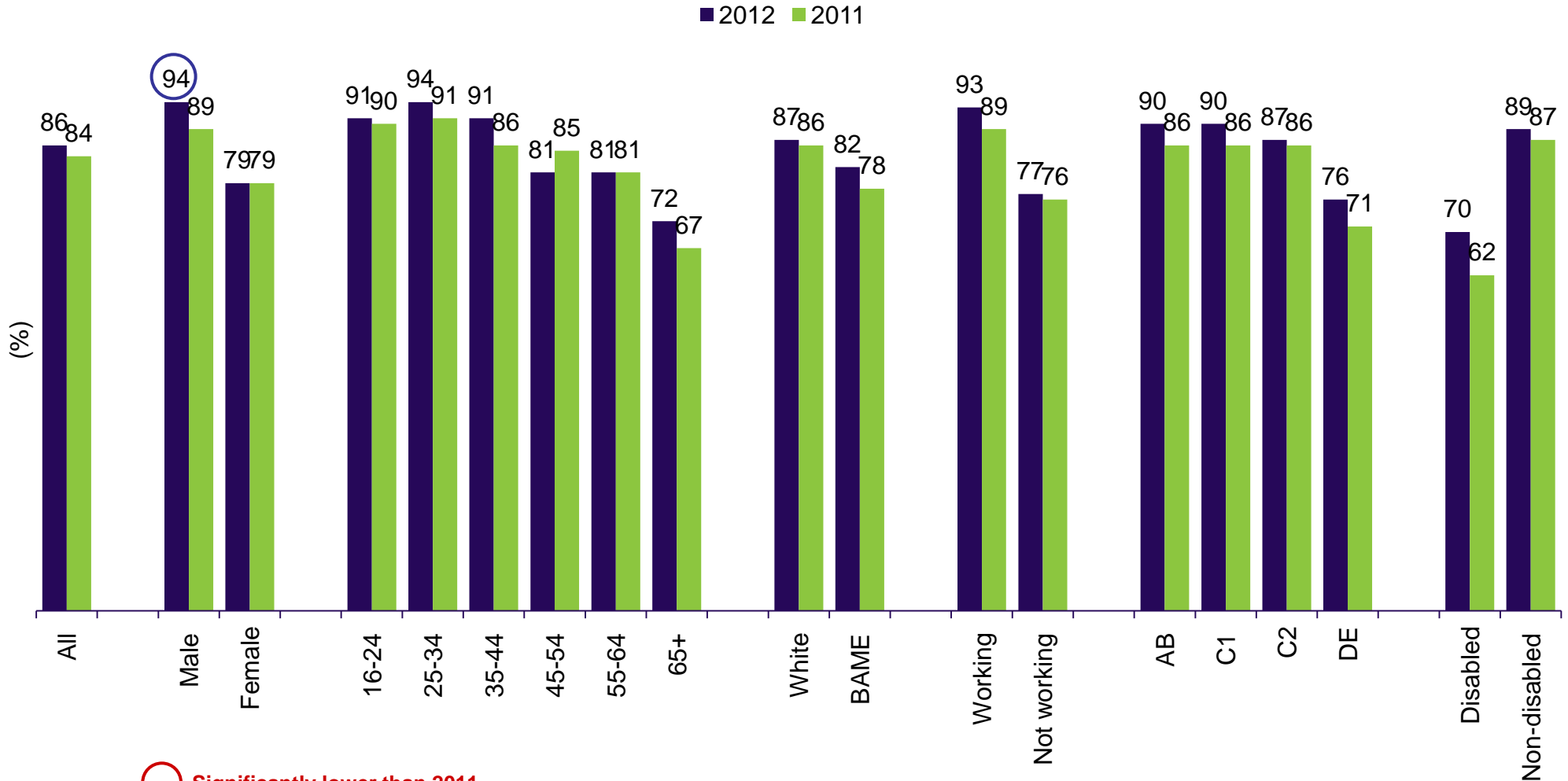
No significant differences compared with 2011

QFREQ: Which of these modes of transport do you ever use to get around London? Base: all – 2012 (1,326), 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208) QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London? Base: All cyclists – 2012 (508), 2011 (176), 2010 (156), 2009 (164), 2008 (159), 2007 (189)



# 86% of Londoners can ride a bike; particularly high amongst men, white Londoners and non-disabled Londoners

Percentage able to ride a bike



 Significantly lower than 2011

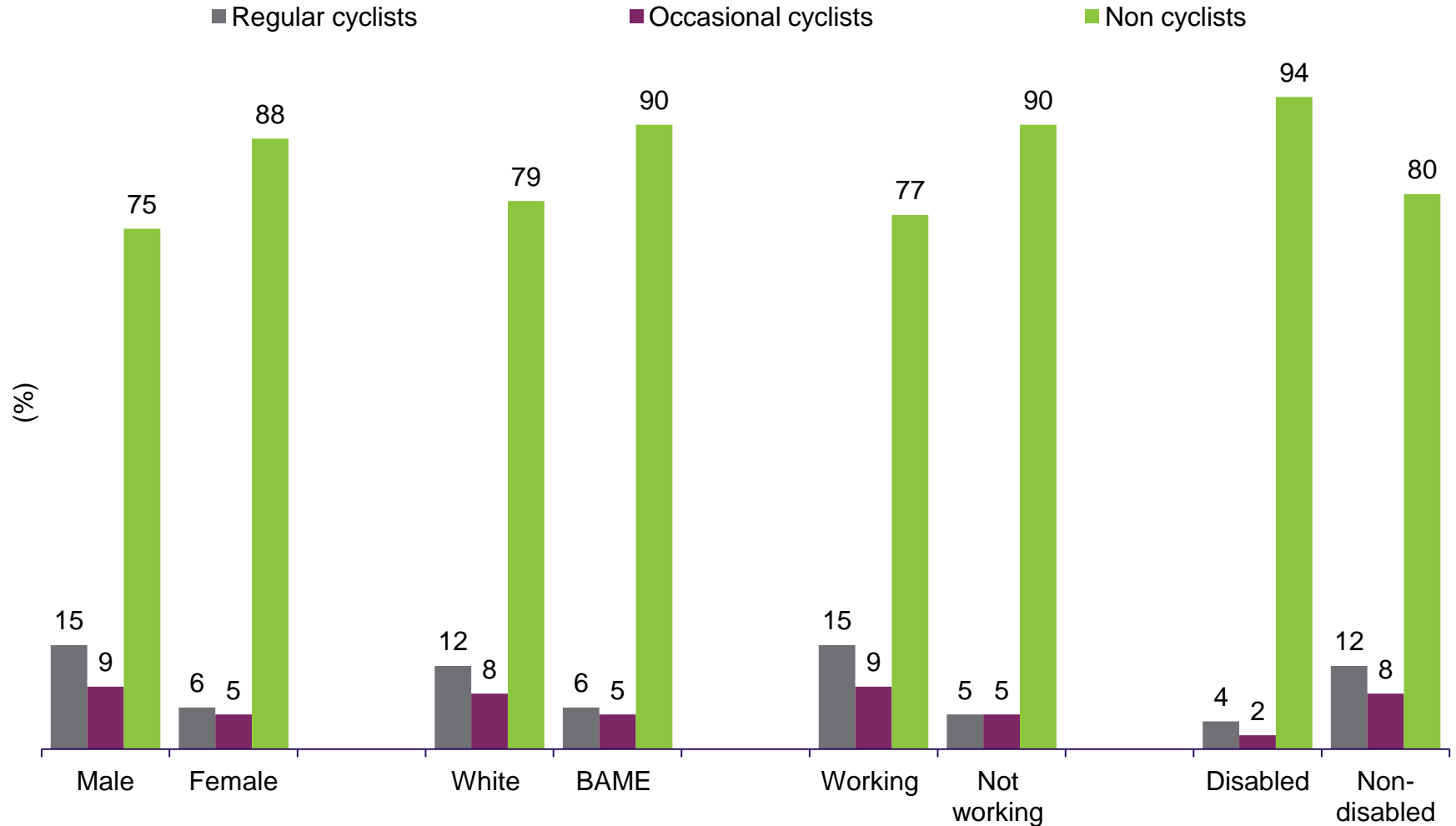
QBIKE1: Can you ride a bicycle?

Base: All respondents



# Regular cyclists are more likely to be male, white, in work and non-disabled

## Profile of cyclists



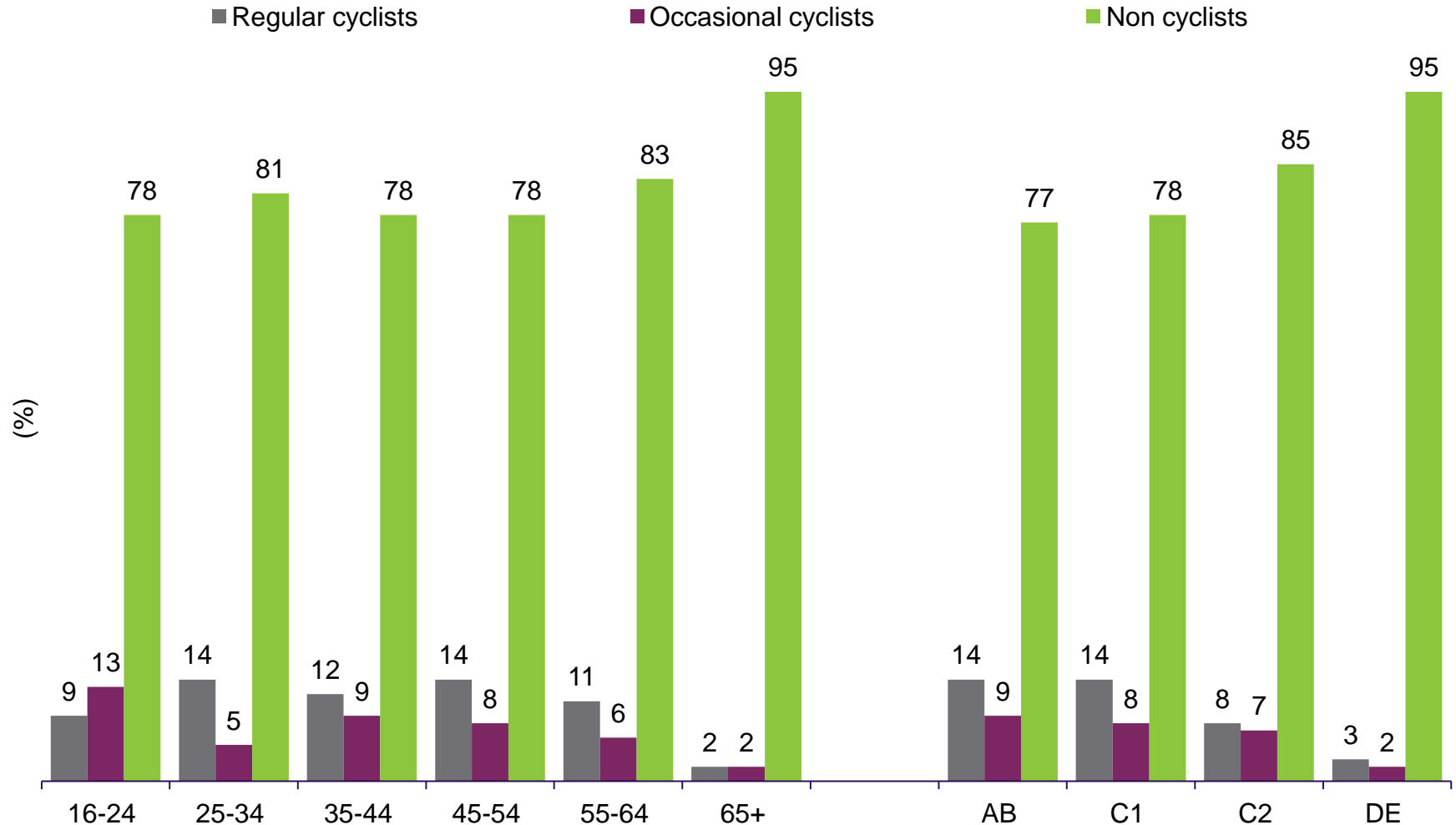
Demographic questions

Base: All – Regular cyclists (292), Occasional cyclists (213), Non-cyclists: (821)



# Most cyclists are aged between 25-54 and classified as living in ABC1 households

## Profile of cyclists



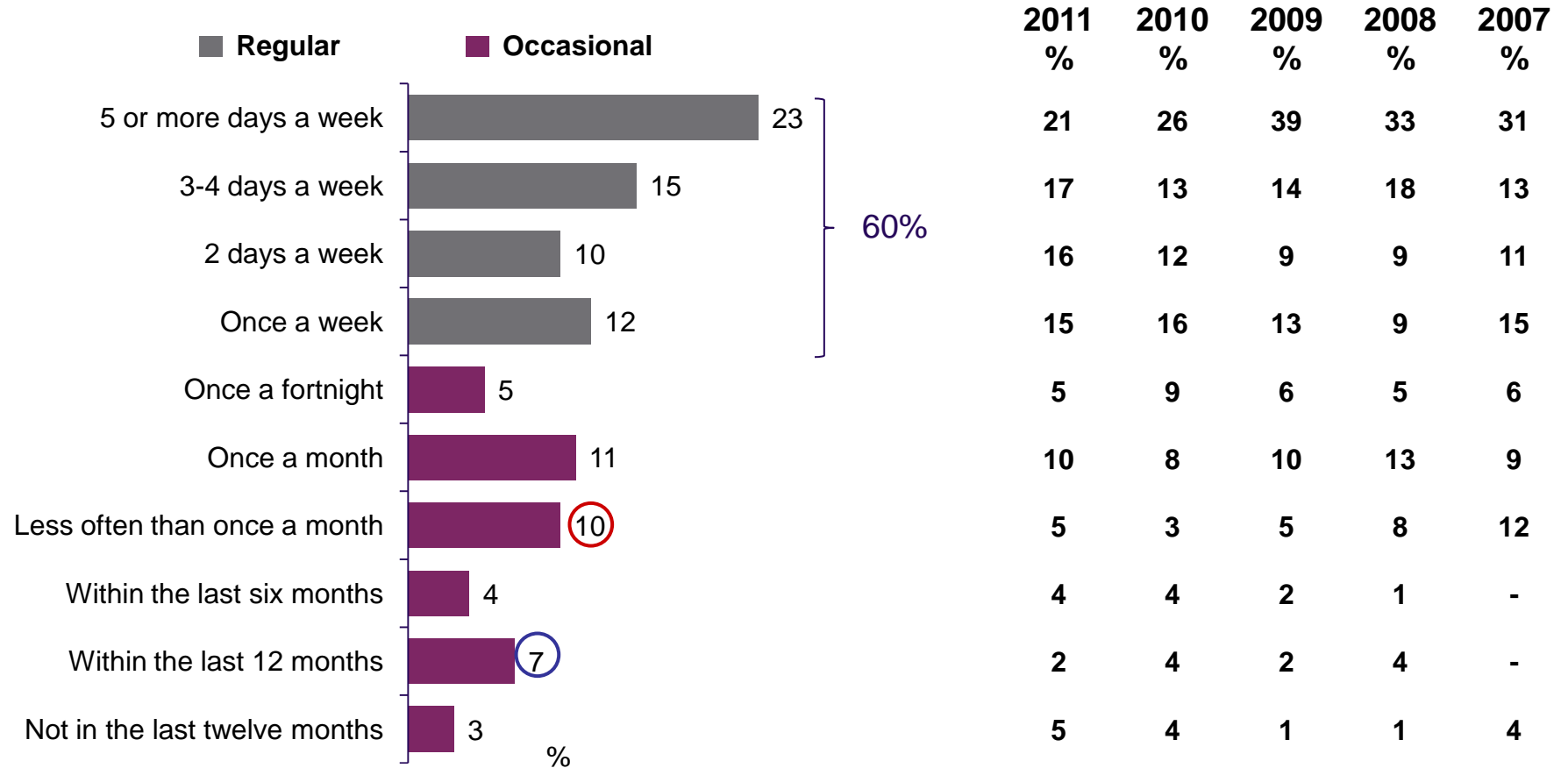
Demographic questions

Base: All – Regular cyclists (292), Occasional cyclists (213), Non-cyclists: (821)



# Amongst all cyclists, a quarter cycle five or more days a week

## Frequency of cycling amongst cyclists



○ Significantly lower than 2011

○ Significantly higher than 2011

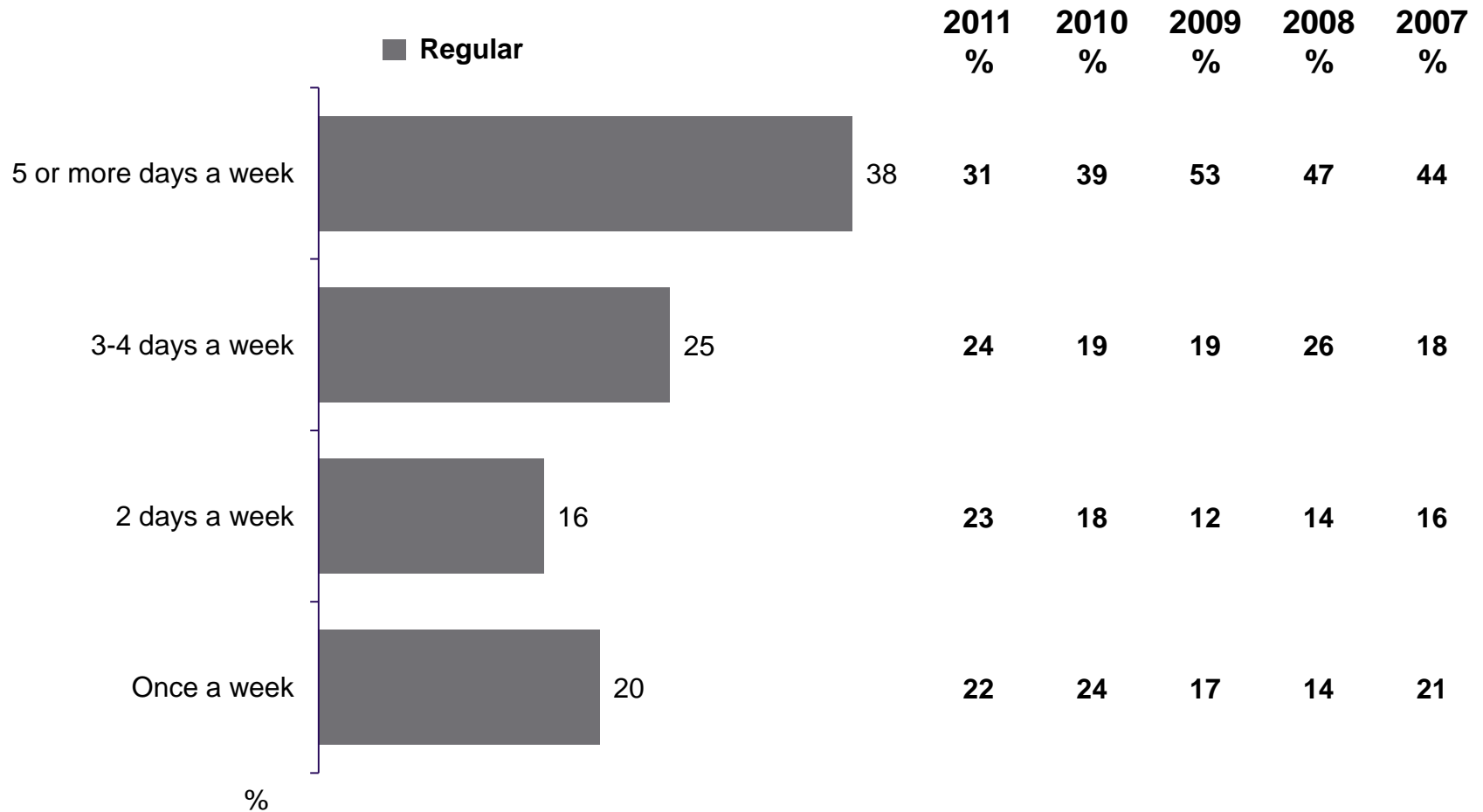
QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London?

Base: All cyclists – 2012 (505), 2011 (176), 2010 (156), 2009 (164), 2008 (159), 2007 (188)



# Most regular cyclists cycle at least three days a week; patterns have remained constant over time

## Frequency of cycling amongst regular cyclists (trend)



No significant differences compared with 2011

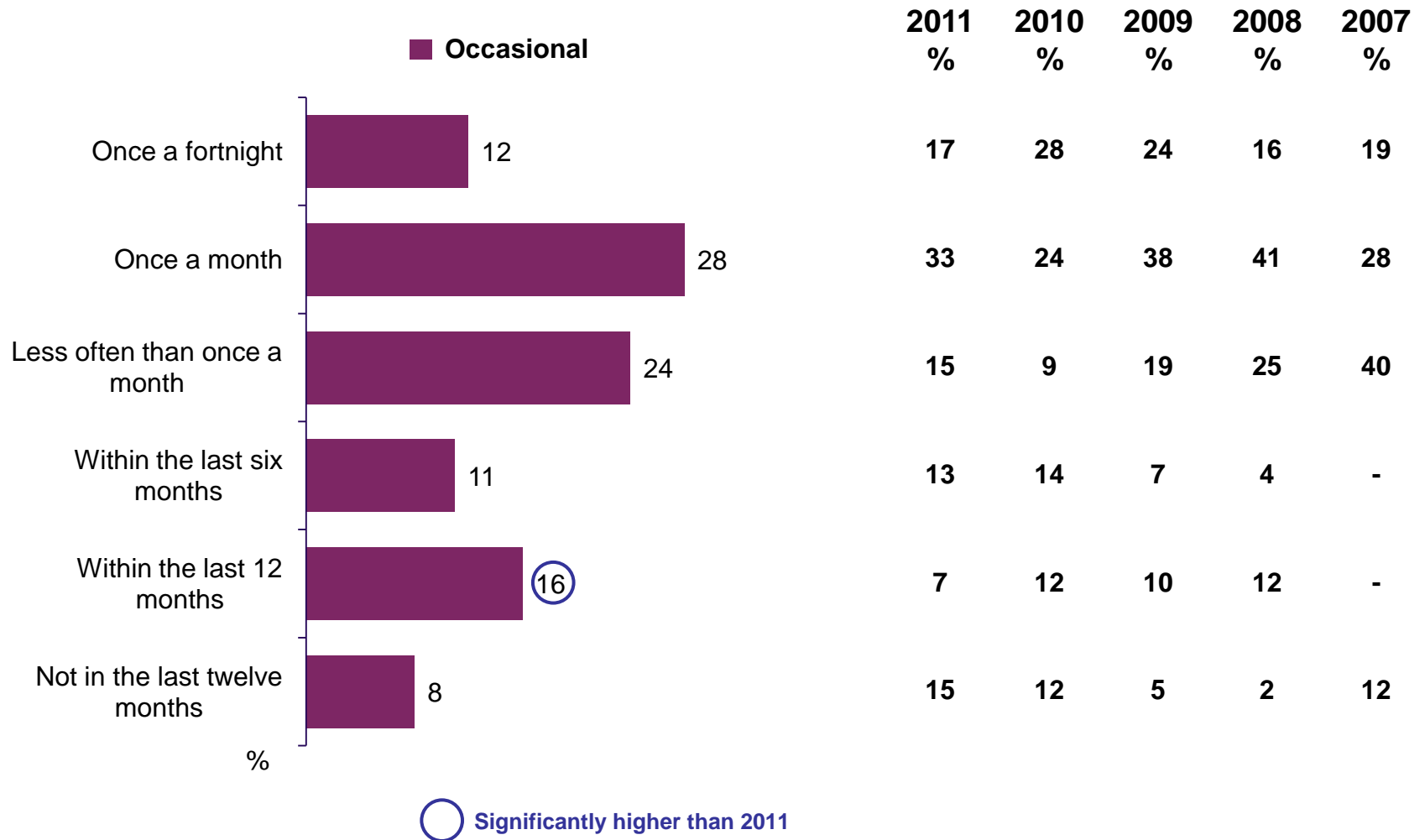
QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London?

Base: Regular cyclists – 2012 (292), 2011 (115), 2010 (107), 2009 (121), 2008 (110), 2007 (131)



# The majority of occasional cyclists use their bikes once a month or less; little change over time

## Frequency of cycling amongst occasional cyclists (trend)



QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London?

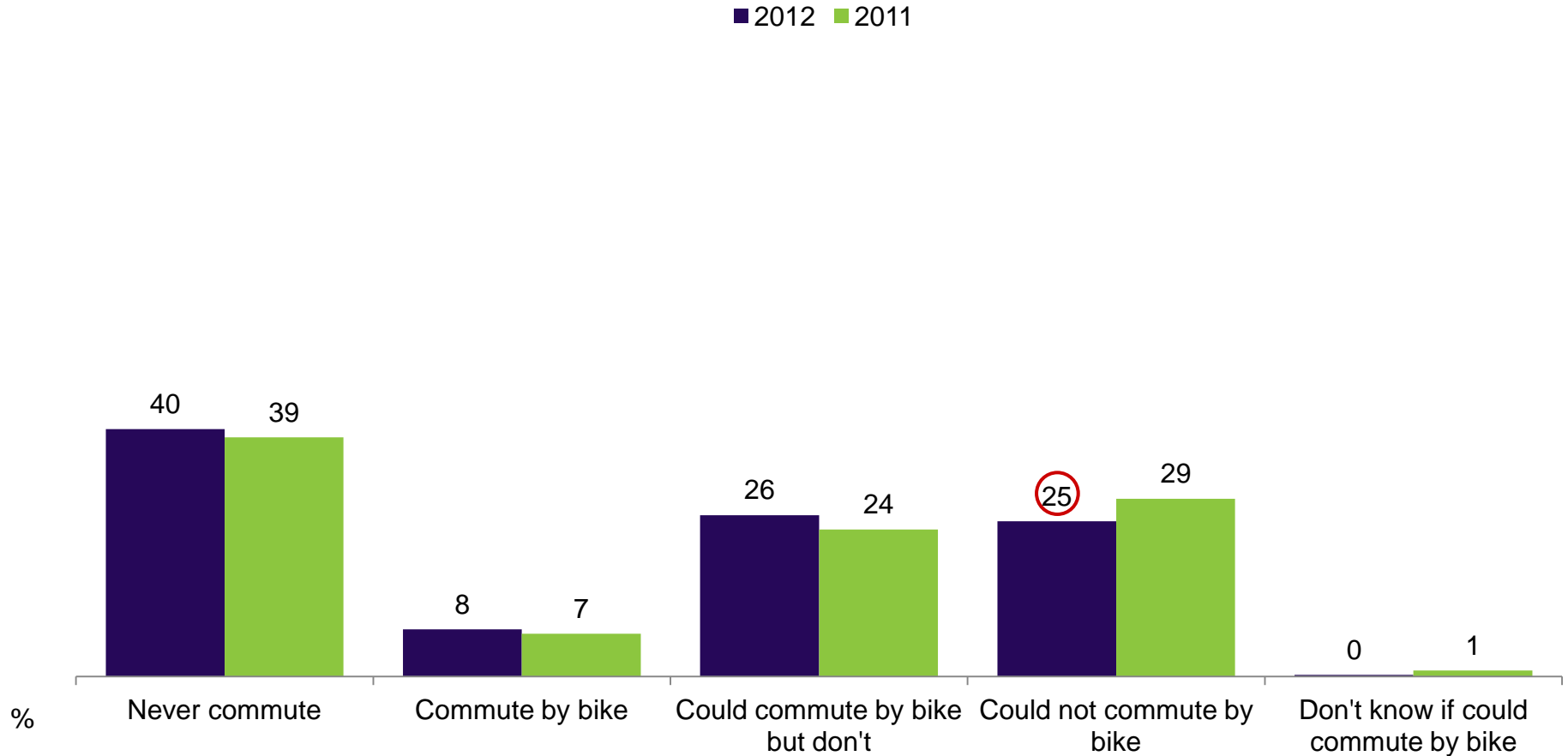
Base: Occasional cyclists – 2012 (213), 2011 (61), 2010 (49), 2009 (42), 2008 (49), 2007 (57)





# A quarter of Londoners (26%) could commute by bike but do not currently; very little change compared with 2011

## Propensity to commute by bike



**○ Significantly lower than 2011**

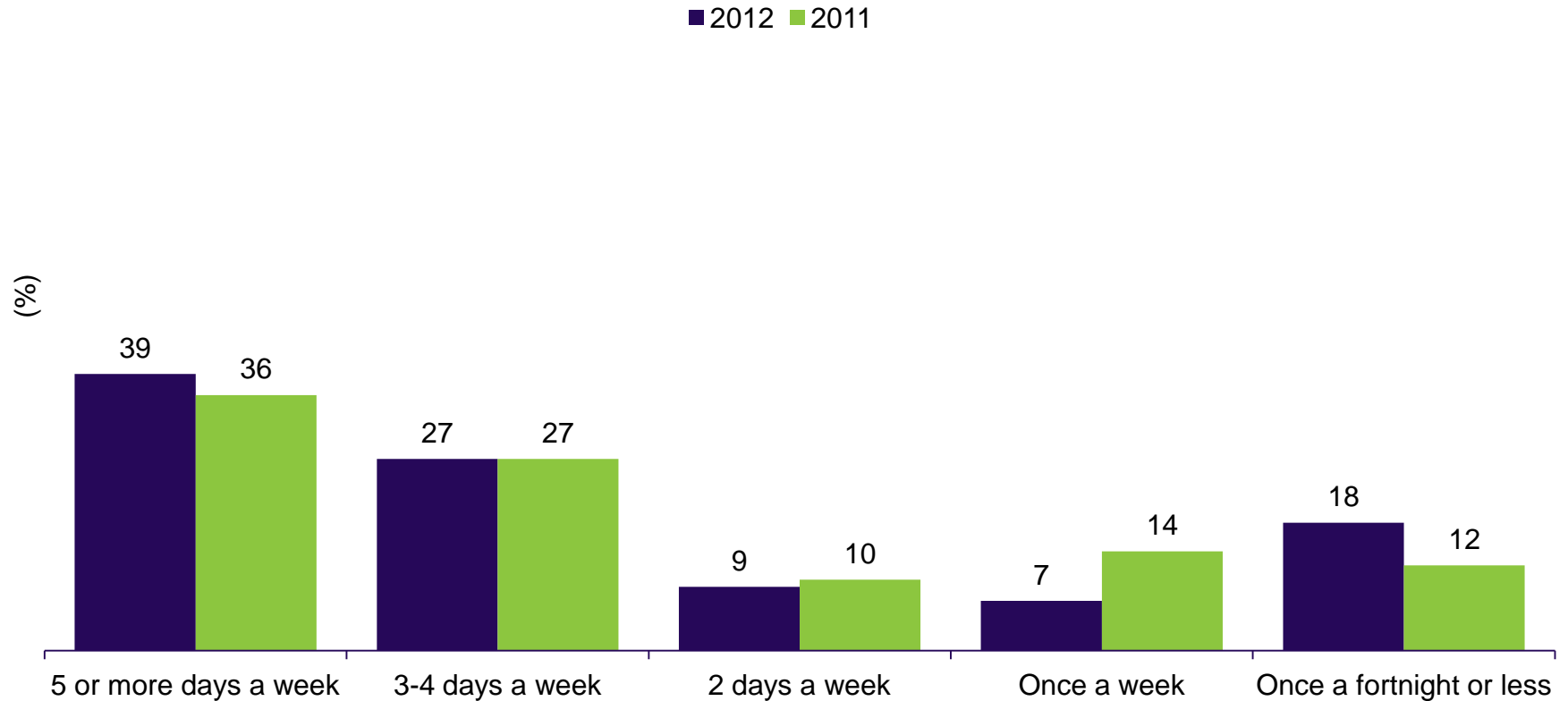
G1: Do you ever commute in London, by which I mean travelling to work, school, college or university? G2: Which types of transport do you use to do this? G4: Could you cycle to work, school, college or university?

Base: all (2012: 1,326; 2011 1,066)



# Of those commuting by bike, almost two fifths do so five or more days a week

## Frequency of commuting by bike



No significant differences compared with 2011

G3: Typically, how often do you cycle as a means of commuting in London?

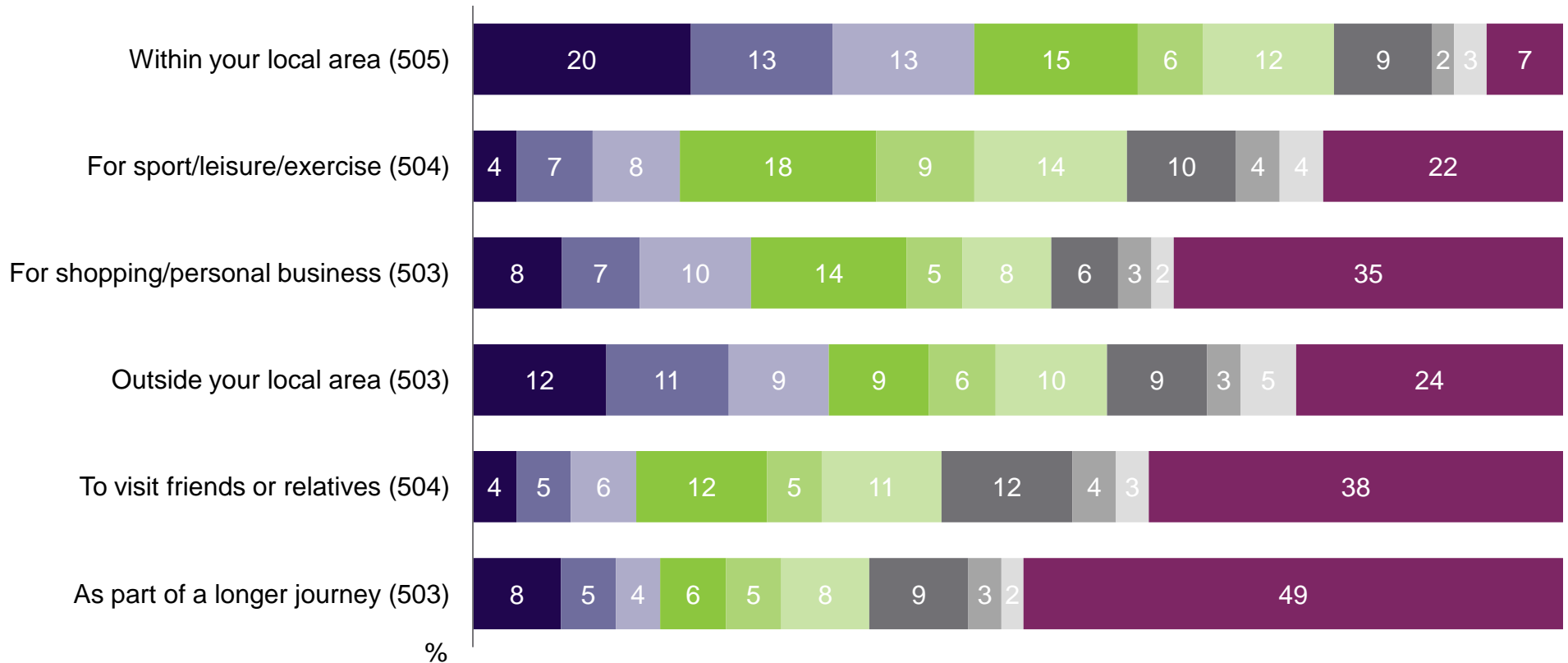
Base: Those commuting by bike (2012: 165; 2011: 58)



# Cyclists cycle most frequently within their local area

## Frequency of travelling by bike by journey purposes

- 5 or more days a week
- 3-4 days a week
- 2 days a week
- Once a week
- Once a fortnight
- Once a month
- Less often than once a month
- Within the last 6 months
- Within the last 12 months
- Never/not within the last 12 months



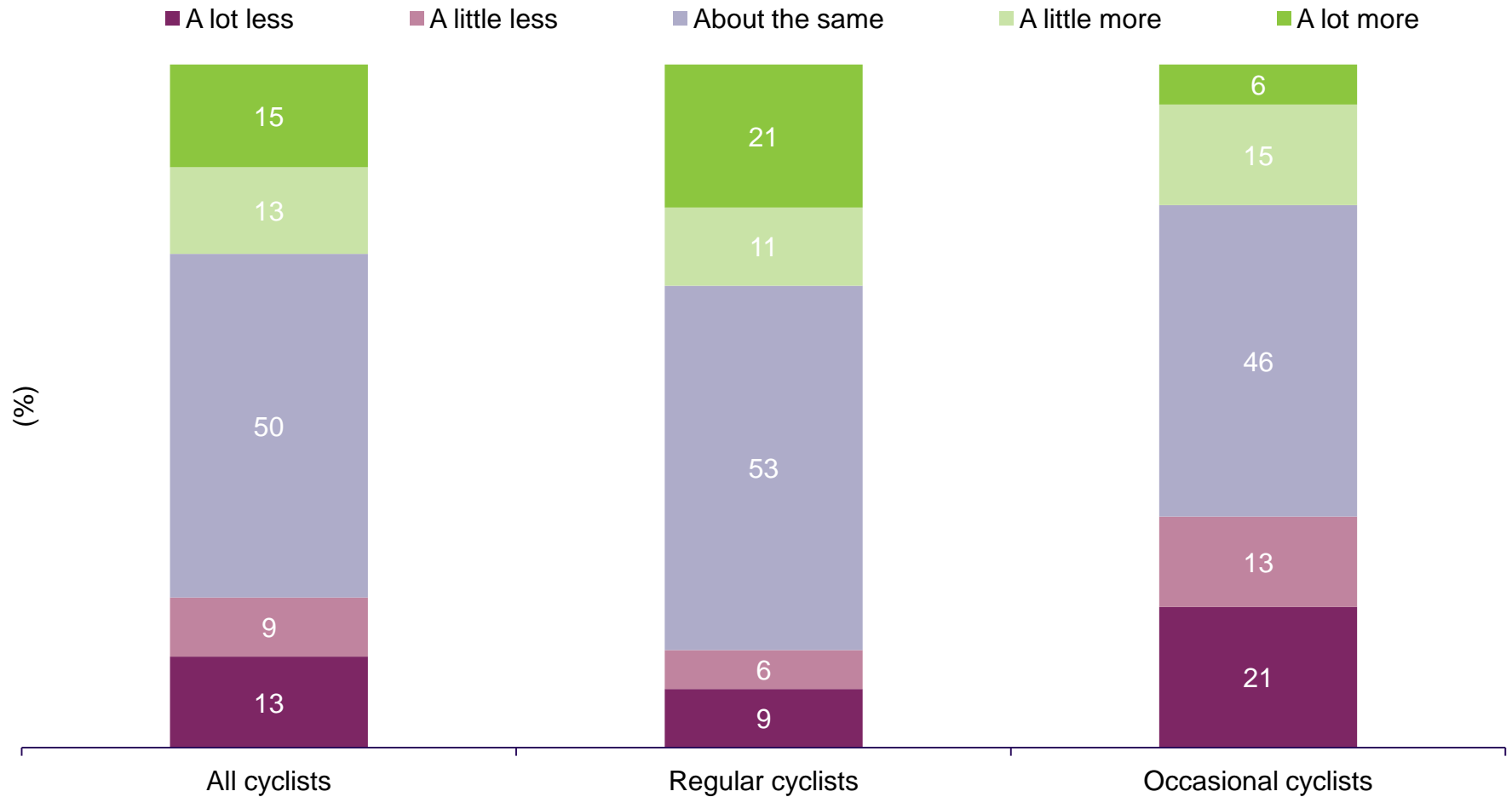
F1: How often do you cycle...?

Base: All cyclists (excluding 'don't know' - numbers in brackets in chart)



# Regular cyclists are more likely to have increased the amount they cycle than occasional cyclists

Frequency of travelling by bike compared with last year



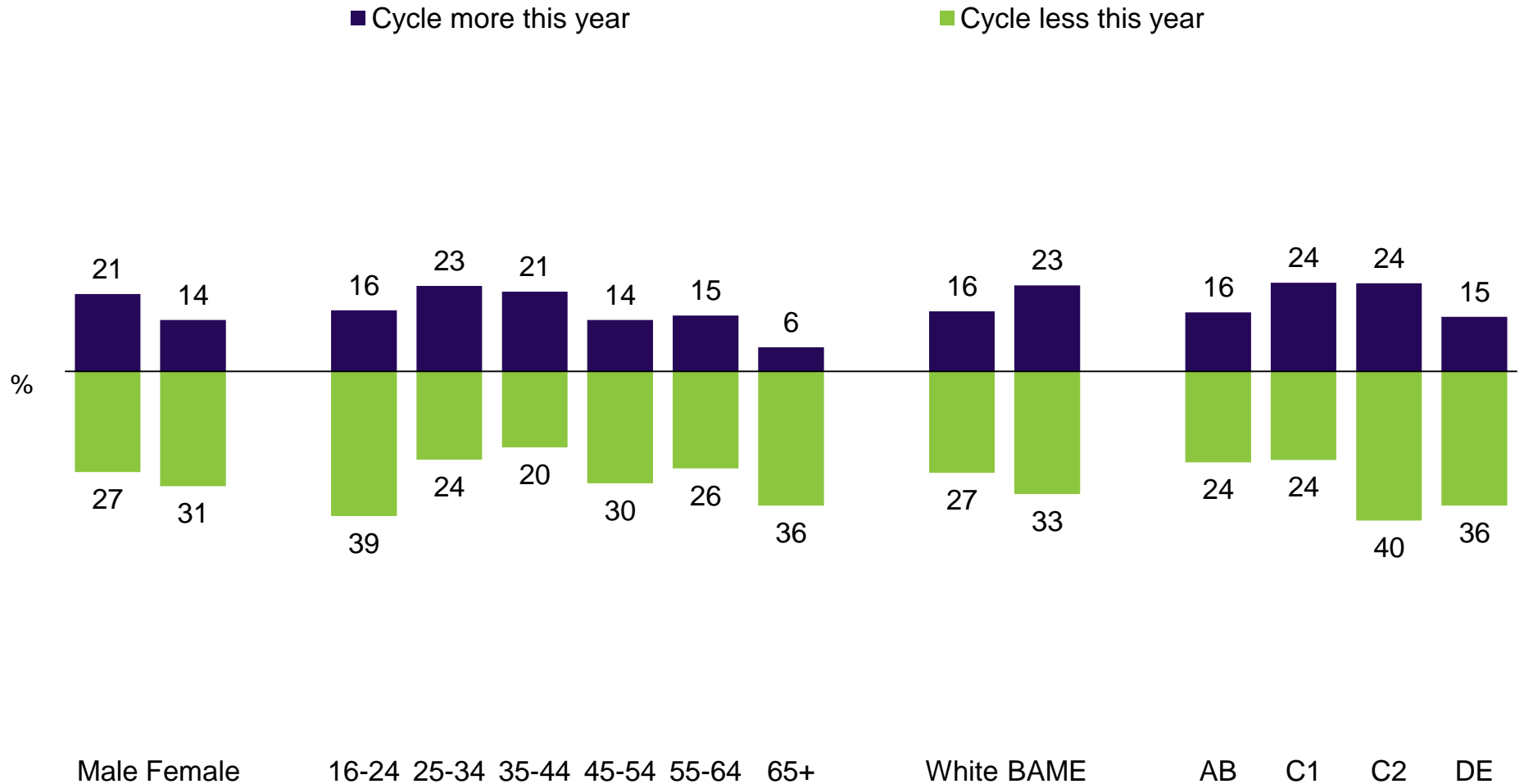
D1. How do you think the amount you cycle in London is compared to this time last year? Would you say you now cycle...?

Base: All cyclists (505)



The greatest change is shown amongst young people and BAME Londoners; older and younger Londoners, and those in C2DE socio-economic groups, are most likely to cycle less

Frequency of travelling by bike compared with last year



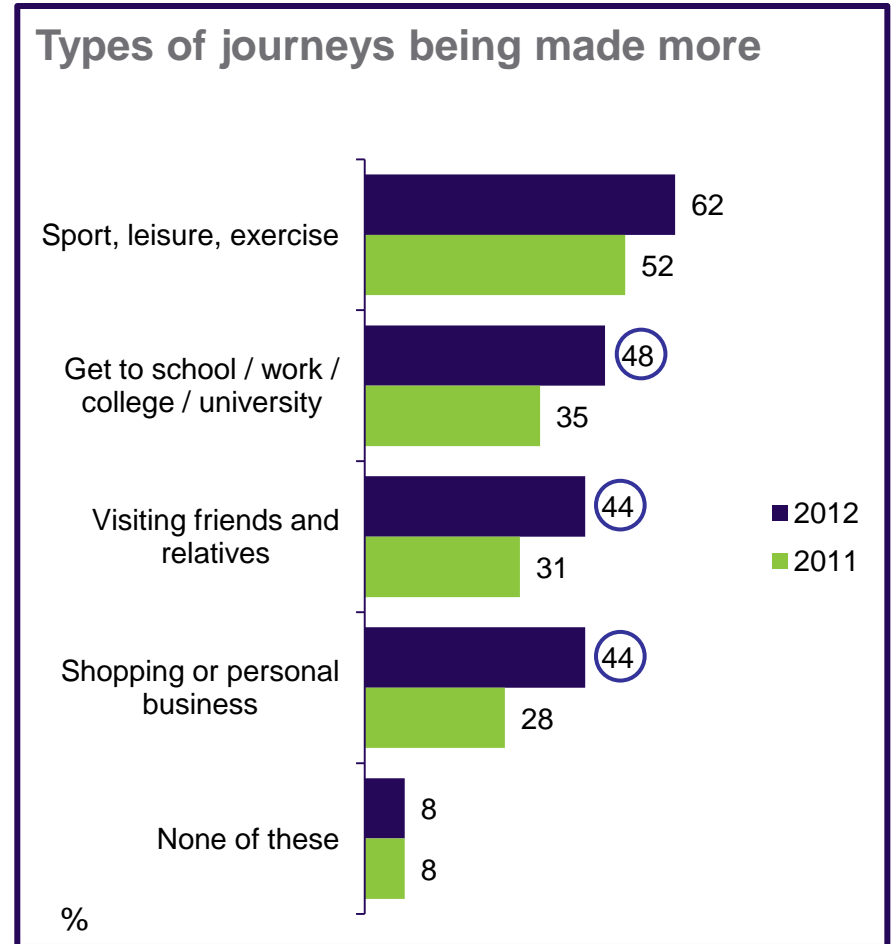
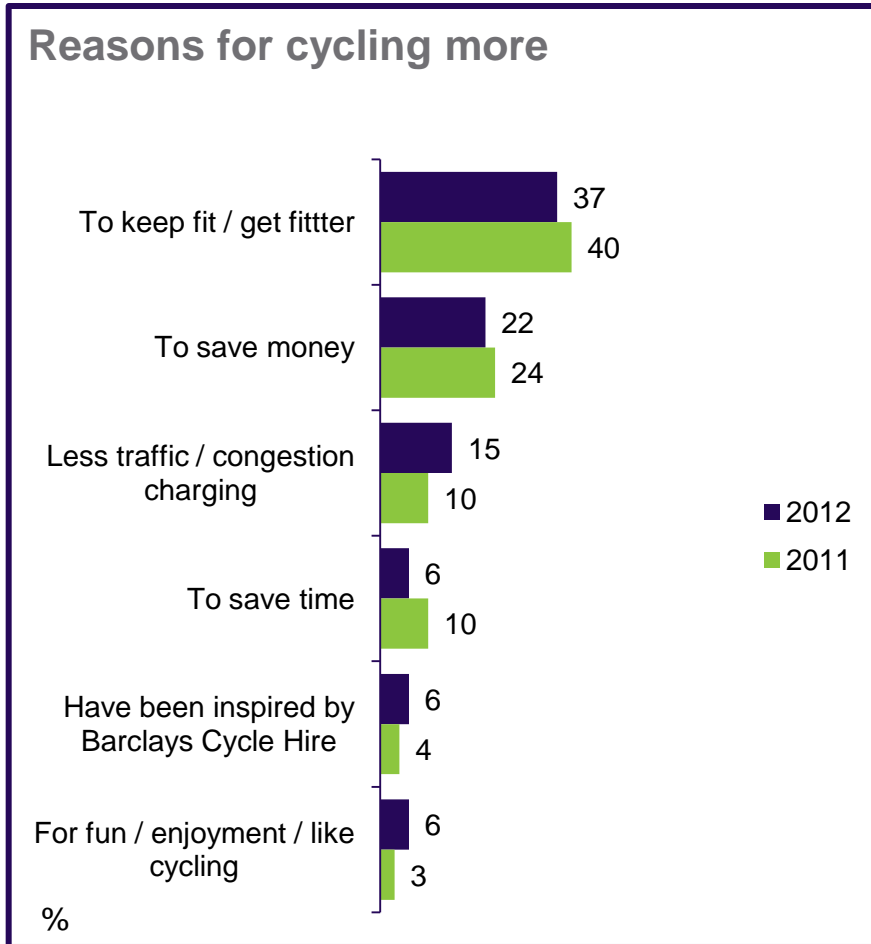
D1. How do you think the amount you cycle in London is compared to this time last year? Would you say you now cycle...?

Base: All excluding those who did not cycle this year or last



# Fitness continues to be the main motivator for cycling more; most are making extra trips for sport, leisure or exercise

## Reasons for cycling more, and purpose of extra journeys



Significantly higher than 2011

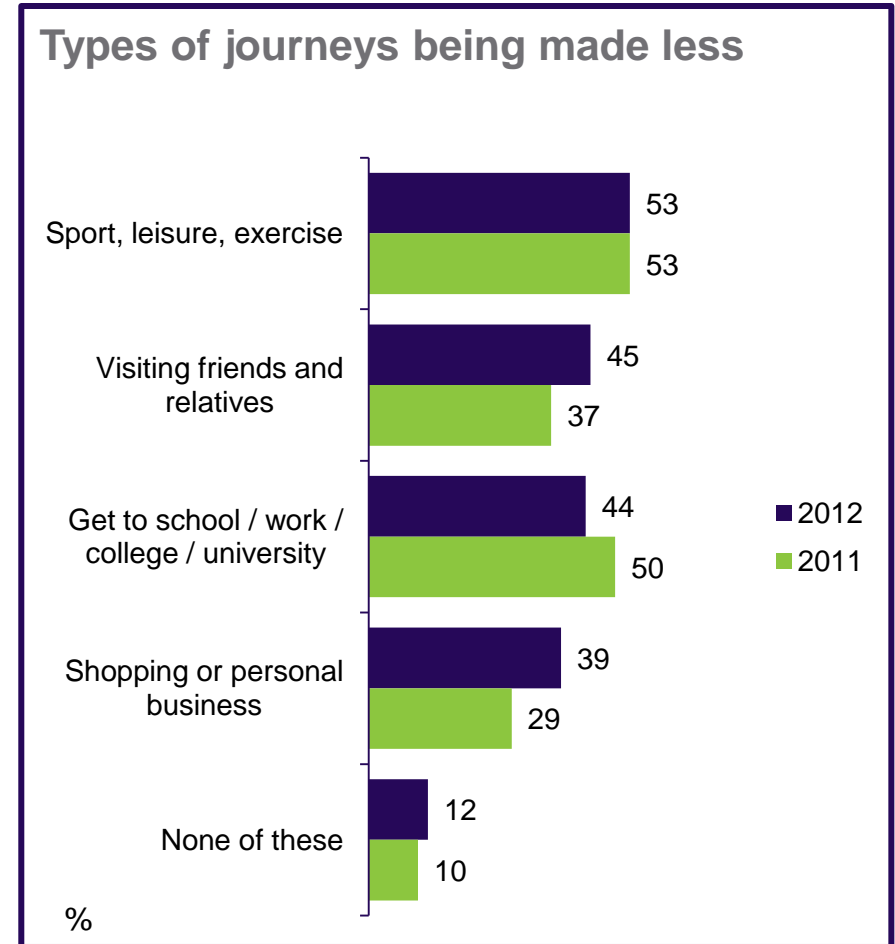
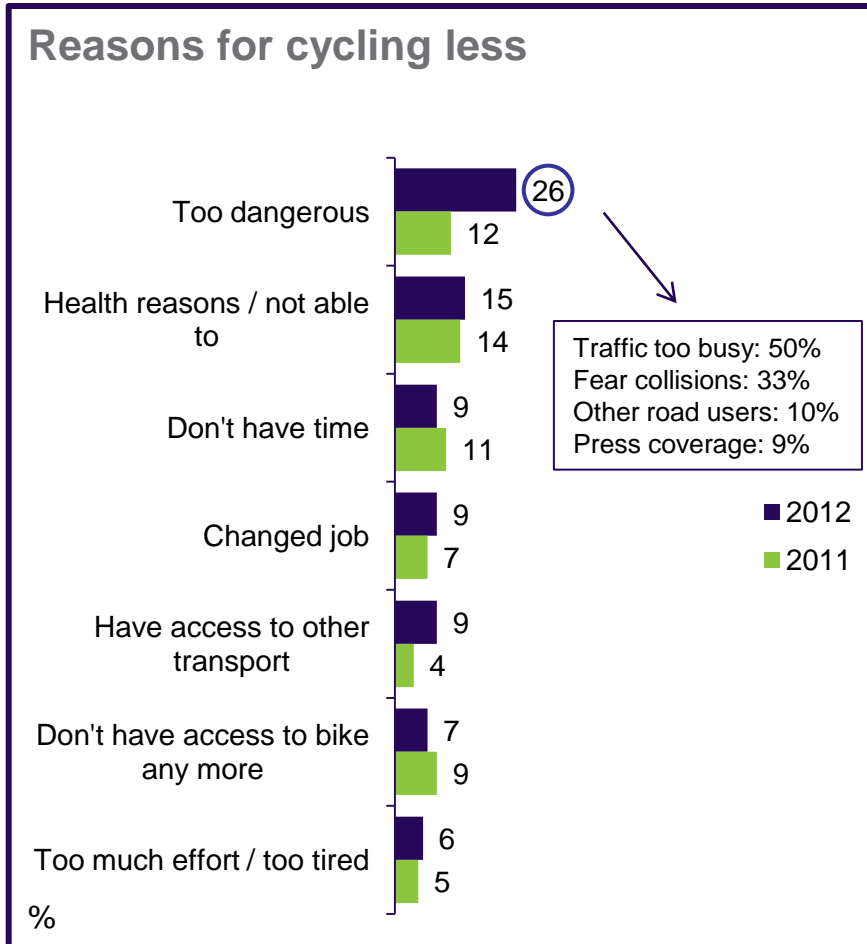
D2. Why have you started cycling more this year? D3. What sort of trips have you been making more by bike compared with this time last year?

Base: All making more trips (143)



# Concerns about safety are most likely to reduce the amount people cycle; all kinds of trips are affected by this

## Reasons for cycling less, and types of trips being made less



Significantly higher than 2011

D4/D5/D6: Why are you cycling less this year? / Why do you feel that cycling is dangerous? / What sort of trips having you been making less by bike this year compared with this time last year? Base: All making fewer trips 2012 (202); 2011 (122)

# → Cycling history

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# Cycling history

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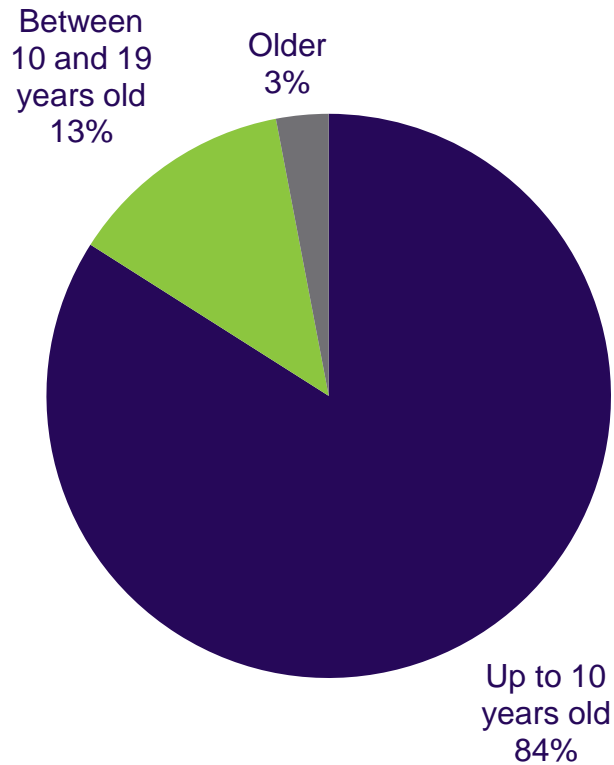
- Almost all Londoners (84%) who can ride a bicycle learned to do so by the age of 10, and only 3% learned after their teenage years
  - Most were taught by their parents
  
- Most people have a break from cycling, often lasting more than a year
  - When they come back to cycling, it is usually out of a desire to get fit or save money
  
- When they return to cycling, most don't take any special measures to get back into it, although many practice on quiet or familiar roads to build their confidence



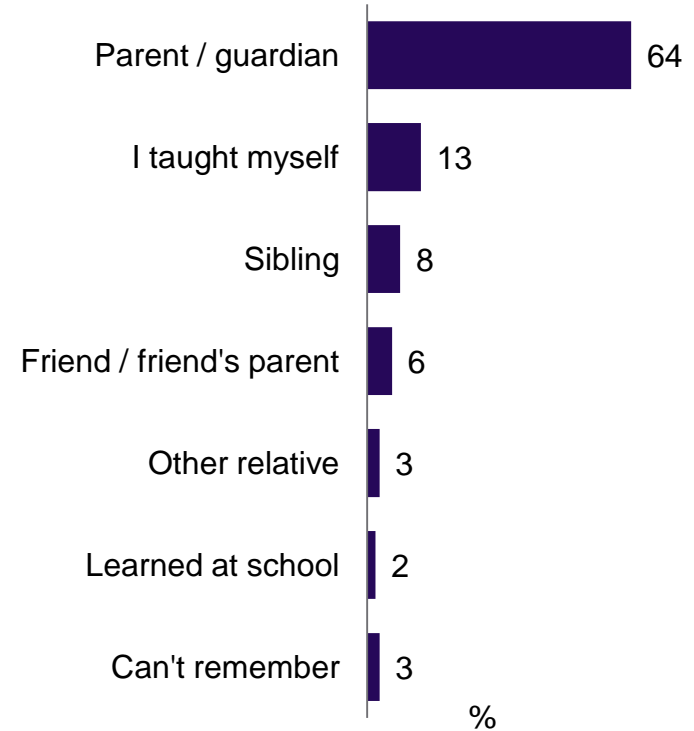
# Most people learn to ride a bike when very young, and are taught by their parents

Age of learning to ride a bike, and who was the teacher

## At what age learned to ride a bike



## Who taught you to ride a bike



QC1: How old were you when you learned to ride a bike? Base: all who can ride a bike (1,150)

QC2: Who taught you to ride a bike? Base: all who can ride a bike (1,150)

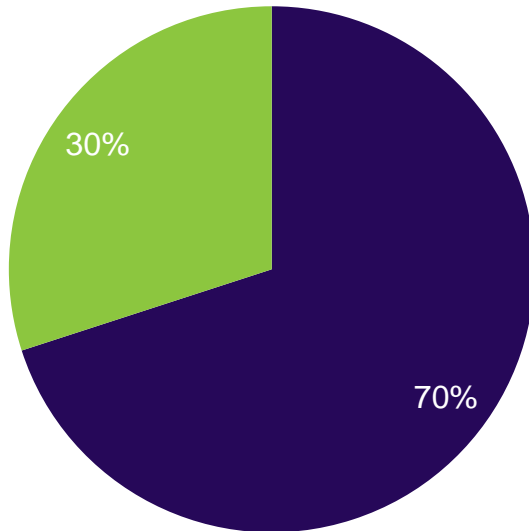


# Most people have a break from cycling at some point for more than a year

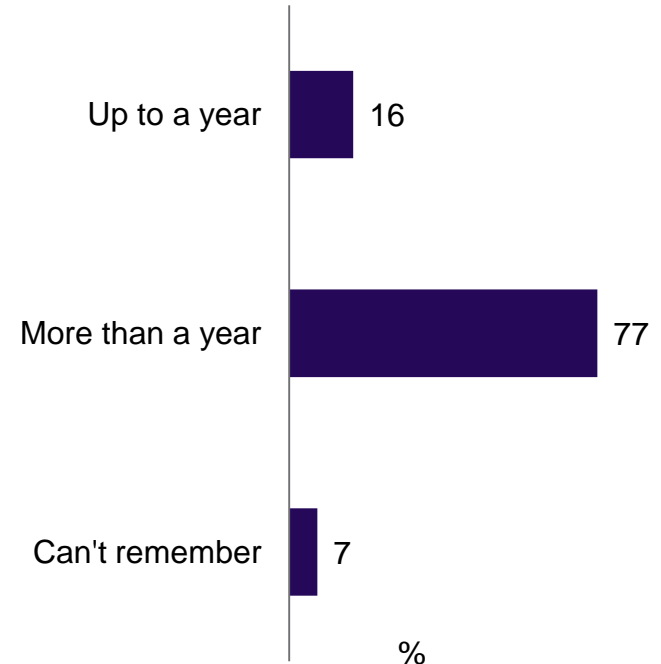
## Taking a break from cycling

Whether cycled continuously or had a break from cycling

- Had period when took a break from cycling
- Cycled continuously



Length of time took before start cycling again



QC3: Have you cycled continuously since you first learned to ride a bike, or have you had periods where you took a break from cycling? Base: All cyclists (505)

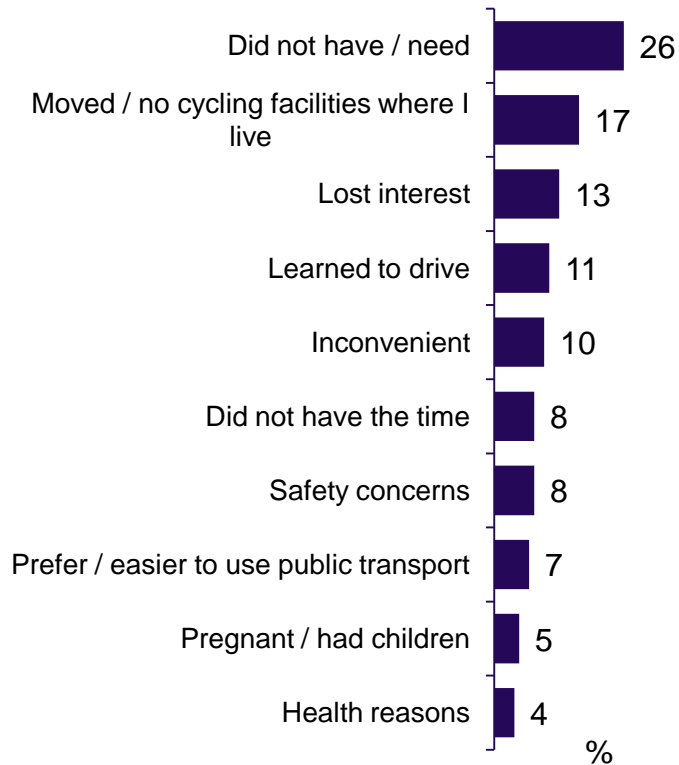
QC4: How long did you have a break from cycling for, before starting again? Base: All cyclists who have taken a break from cycling (362)



The most common reason for stopping cycling is a lack of need; and the desire to get fit and/or save money is most common in motivating people to start again

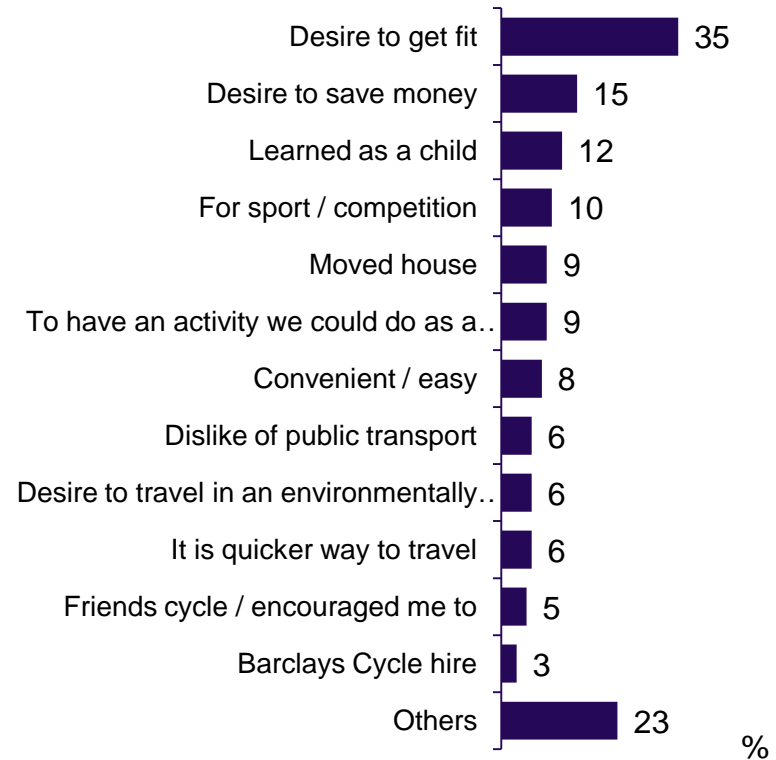
## Getting back in to cycling

### Reasons for taking a break from cycling



Mentions over 3% shown

### Reasons to start cycling (again)



Mentions over 2% shown

QC5: Why did you have a break from cycling? Base: All cyclists who have taken a break from cycling (362)

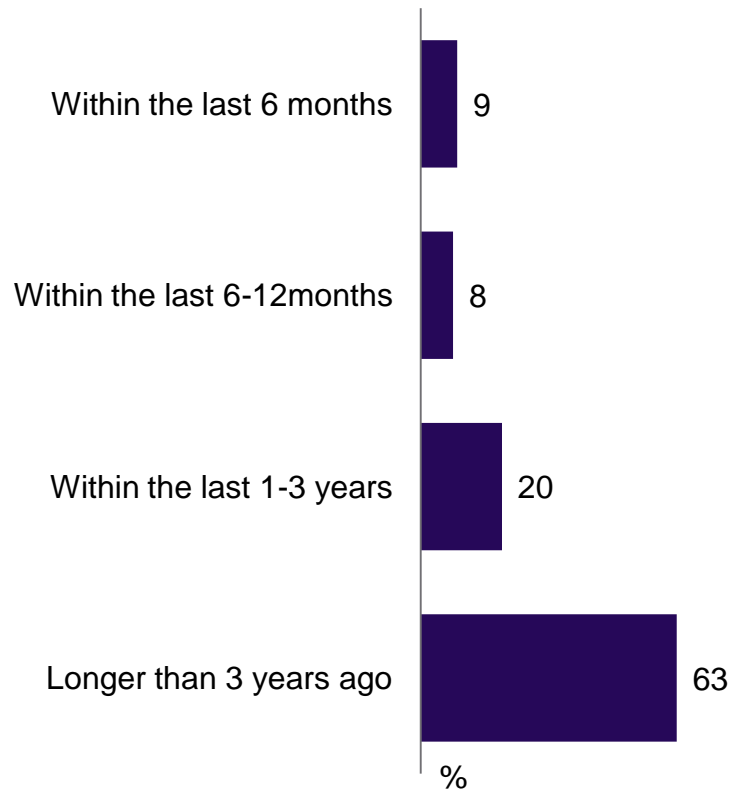
QC6: What prompted you to start cycling? Base: All cyclists who have taken a break from cycling (362)



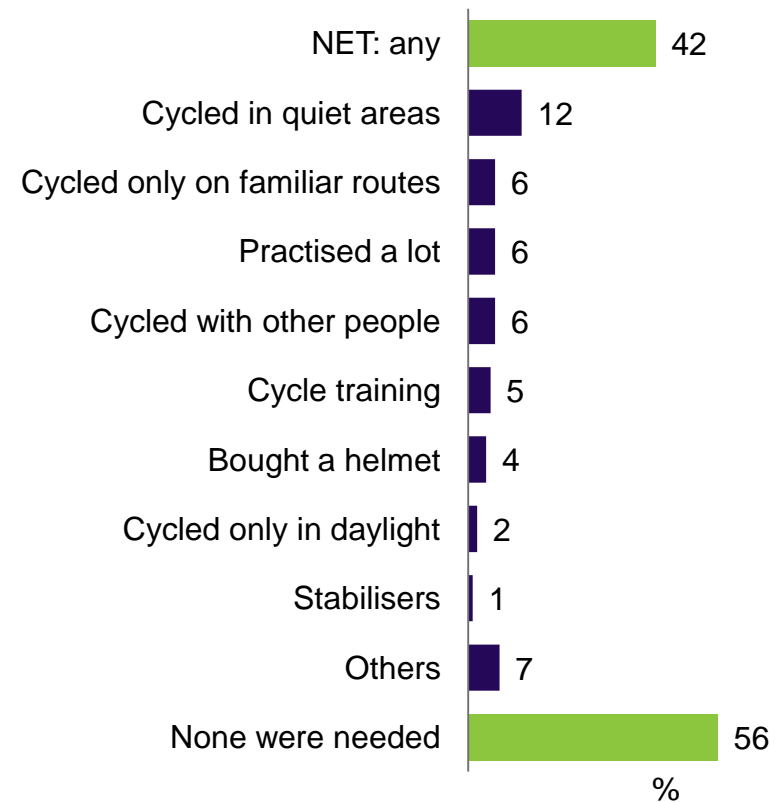
Almost one in ten took up cycling (again) in the last six months; most didn't need to take steps to build their confidence, but those who did tended to practise in a quiet / familiar area

### (Re-)starting cycling

#### When took up cycling (again)



#### Steps took to build confidence as a cyclist



QC7: Which of the following best describes when you took up cycling/ took up again after a break? Was it...? Base: All cyclists (505)

QC8: When you took up cycling, what steps, if any, did you take to build your confidence as a cyclist? Base: All cyclists (505)



# Behaviour change

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# → Behaviour change model

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- The behaviour change model categorises cyclists and non-cyclists into broad behavioural groupings. It has been used by TfL in this format since 2010, before which a similar but incompatible model was used with substantially different question wording
- Cyclists are presented with a number of statements regarding the possibility of cycling more (such as “thinking about doing this”) and must choose the one which most applies to them
- Non-cyclists are presented with the same statements but are asked to respond in relation to the possibility of taking up cycling
- The behavioural groupings are based on responses to these statements, a full list of which is found on the next slide
  - The way that non-cyclists’ responses are grouped was slightly changed in 2012, meaning that comparisons with previous waves should be treated as indicative
- The statements (which are shown on the next slide) do not represent a linear progression, and Londoners may move between any of the groups over time



# Behaviour change model – definitions

NB: groupings in purple lettering changed between 2011 and 2012

	Grouping	Proportion of cyclists (in last twelve months)	Grouping	Proportion of non- cyclists (including 'not in the last 12 months)
You don't want to or would not consider doing this	Pre-primed	3%	Pre-primed	36%
You have never thought about doing this	Pre-primed	3%	Pre-primed	10%
You have given it some thought but are not going to do it	Pre-primed	13%	Pre-primed	28%
You are thinking about doing this	Primed	16%	Primed	12%
You have decided to do this (you have just decided but not yet started to do anything about it)	Primed	7%	Primed	5%
You are setting things in place and / or are seeking more information about this	Preparation	6%	Preparation	1%
You have started doing this but are finding it difficult	Change	7%	Primed	2%
You have started doing this and are finding it easy	Change	7%	Primed	1%
You are already doing this and will continue to do so	Normalised	33%	Primed	2%
You were doing this but couldn't stick to it	Primed	4%	Pre-primed	4%





# Attitudes towards cycling more

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- Cyclists are most likely to be 'normalised', meaning they are already 'cycling more, and will continue to do so' (33%)
- 27% are primed meaning they are 'thinking about cycling more', 'have decided to cycle more' or 'were cycling more but couldn't stick to it'. These figures have remained steady over the past three years
- Most non-cyclists (77%) are 'pre-primed' meaning they 'would not consider taking up cycling', 'have never thought about taking up cycling' or 'have given taking up cycling some thought but are not going to do so', or 'were doing this, but couldn't stick to it'. Due to changes in the classification of responses, this percentage is higher than in previous waves, although the overall pattern of response to the question has remained steady
- A quarter (22%) are 'primed' to take up cycling (meaning they are 'thinking about it', or 'have decided to do it')



# Motivations and impact of cycling more

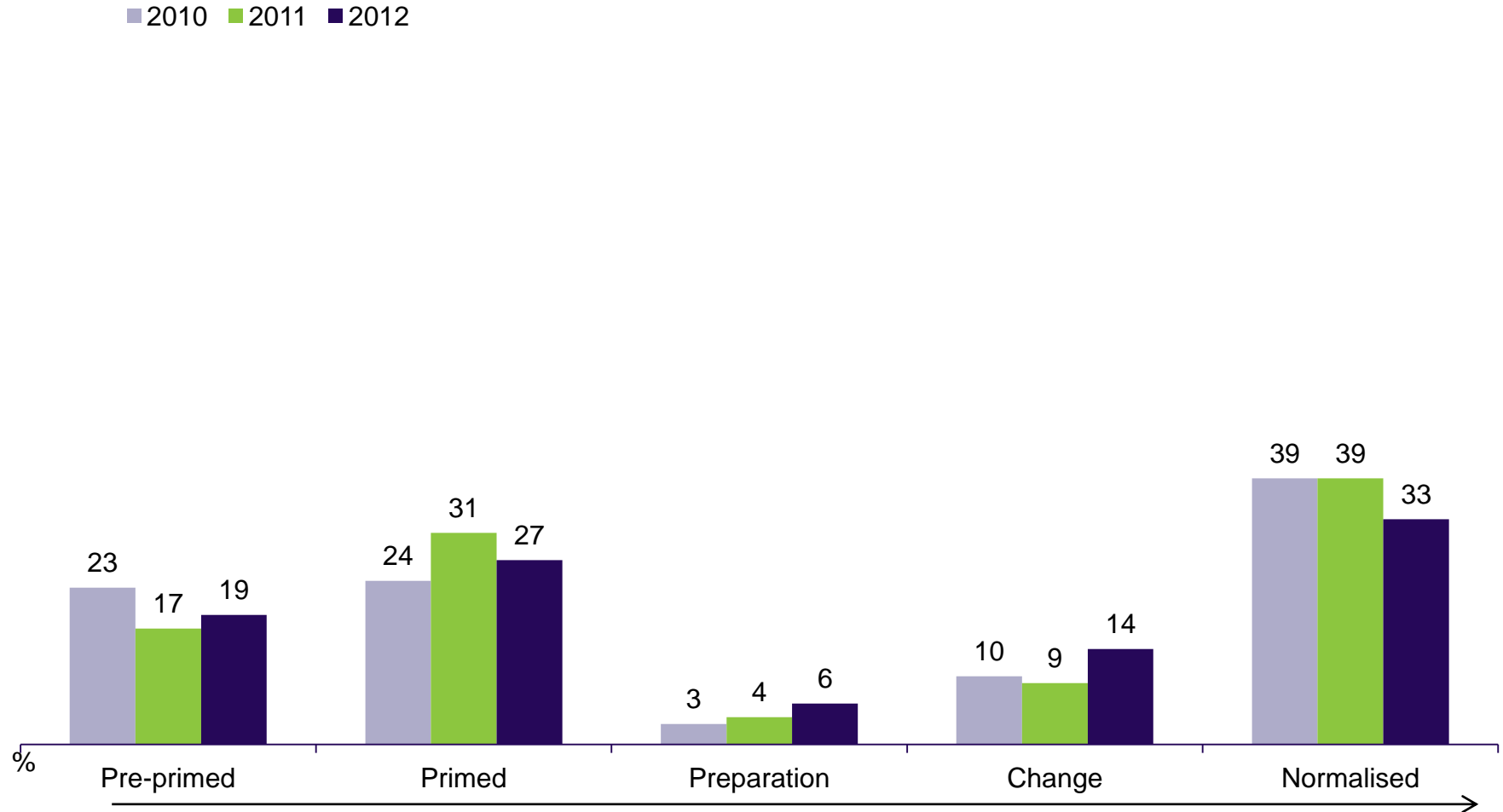
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- For both cyclists and non-cyclists, the main motivators and barriers to cycling more/taking up cycling are the same. The main motivator is increased fitness. The desire to save money and time are also reasons commonly mentioned
- Safety concerns are most likely to be cited as a deterrent to increasing/taking up cycling, particularly for non-cyclists and occasional cyclists
- For both cyclists and non-cyclists, if they were to cycle more/take up cycling, bus, car and Tube are the modes that cycling would most likely replace. Just 2% of cyclists, and 1% of non-cyclists, said they would be making extra trips if they increased their cycling



# Cyclists are most likely to be 'normalised' meaning they are already 'cycling more, and will continue to do so'

## Cyclists (trend)



No significant differences compared with 2011

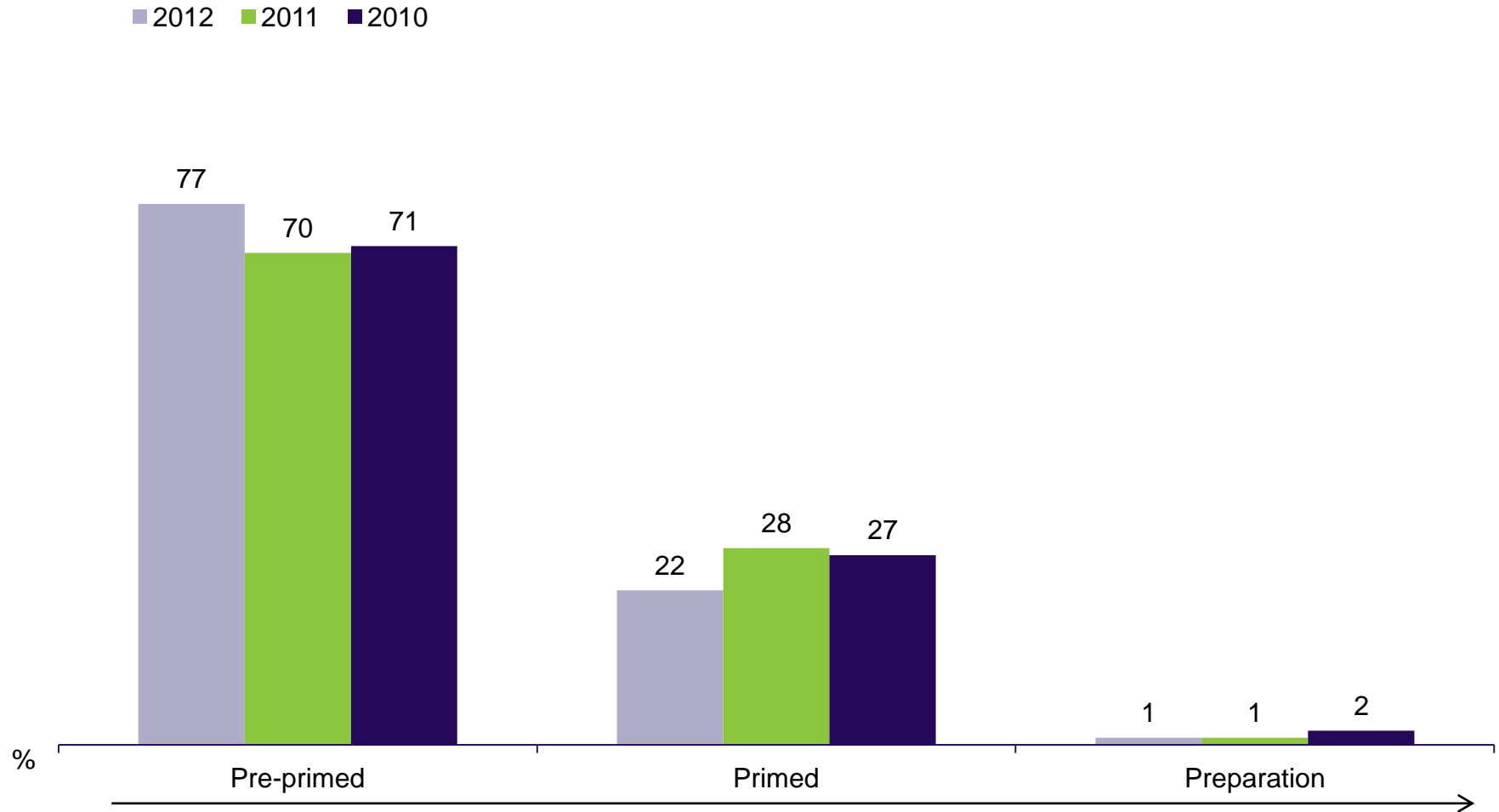
B1: Thinking about the possibility of "cycling more", which of these descriptions would you say MOST applies to you?

Base: Those who have cycled around London within the last 12 months, 2012 (484), 2011(167), 2010 (148)



Three quarters of non-cyclists are 'pre-primed', meaning they 'don't want to or would not consider cycling', 'have never thought about it', 'have given it some thought but are not going to do it', or 'were cycling more but couldn't stick to it'

## Non-cyclists



B2: Thinking about the possibility of 'taking up cycling', which of these descriptions would you say MOST applies to you?

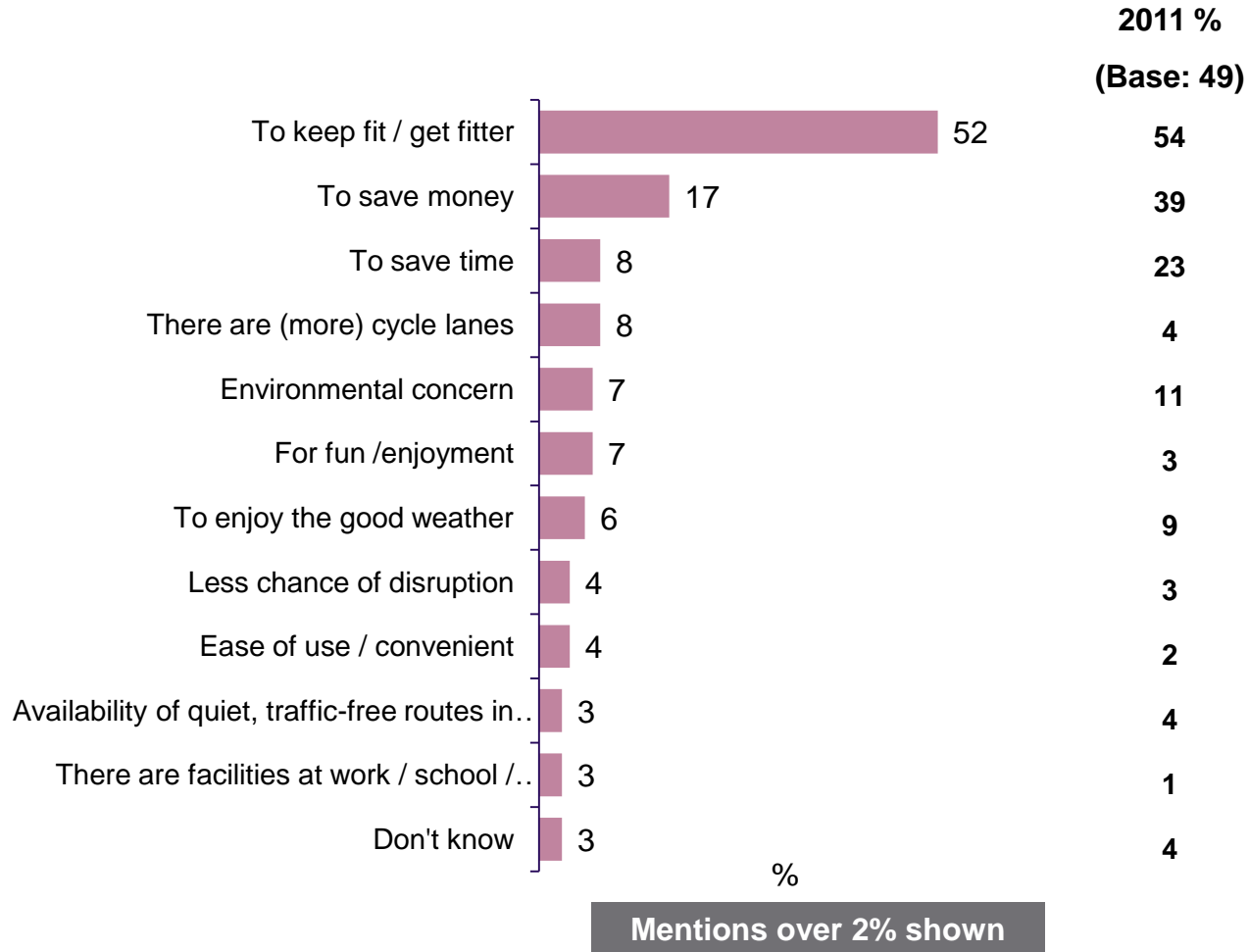
Base: Non-cyclists and those who have cycled around London but not in the last 12 months, 2012 (842), 2011 (899), 2010 (859)



# Fitness and the ability to save time/money are the most common motivators for increased cycling

## Motivations for cycling more

**Primed\* and preparation cyclists**



E3: What is making you actively consider cycling more in London?

Base: Those "thinking about...decided to...are setting things in place to..." cycle more (133)

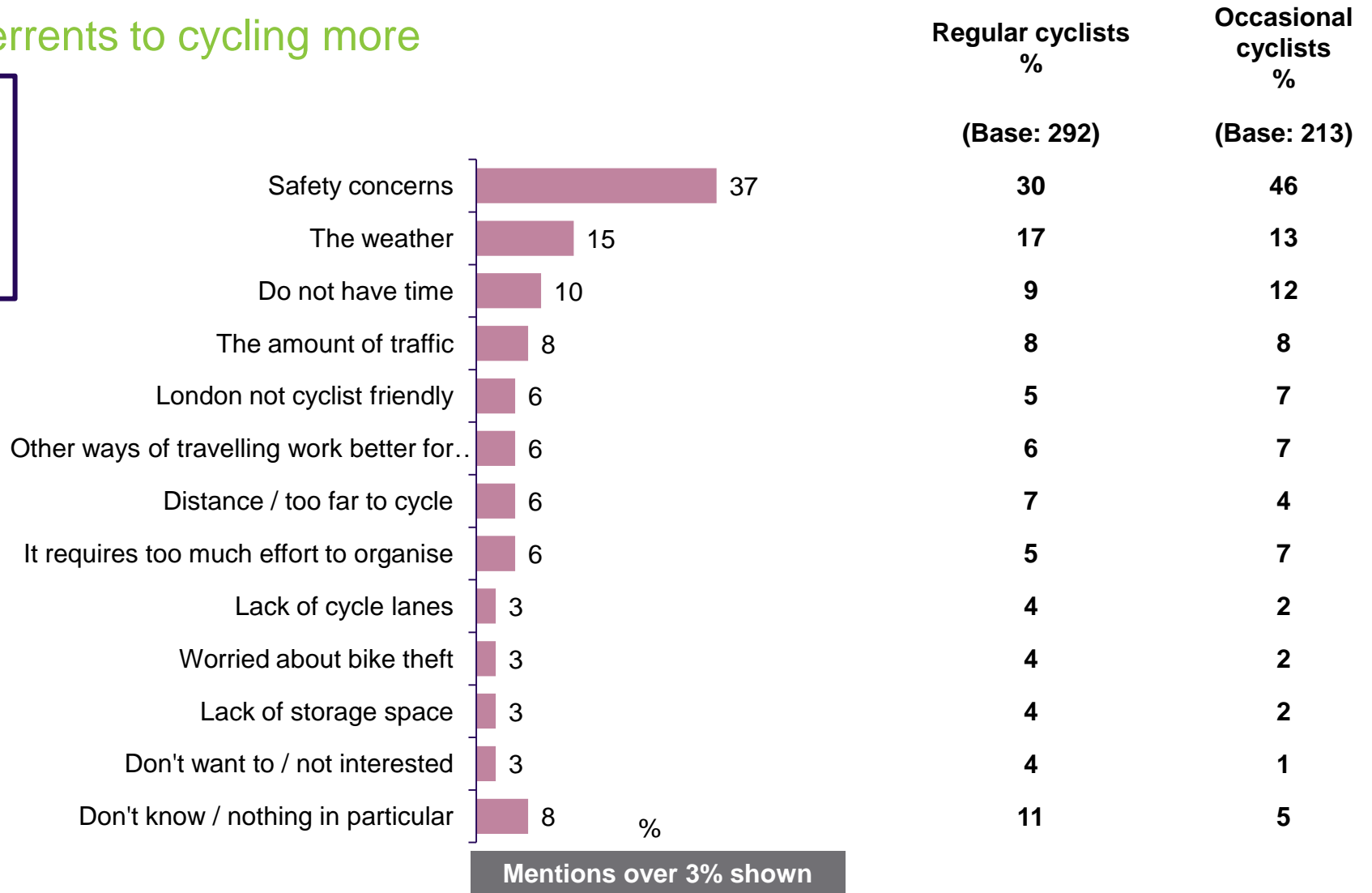
\* Includes 'primed' individuals except those who 'were doing this but couldn't stick to it' at B1



# Safety concerns (particularly for occasional cyclists) and the weather are most likely to deter cyclists from cycling more

## Deterrents to cycling more

All cyclists



E7: What deters you from cycling more?

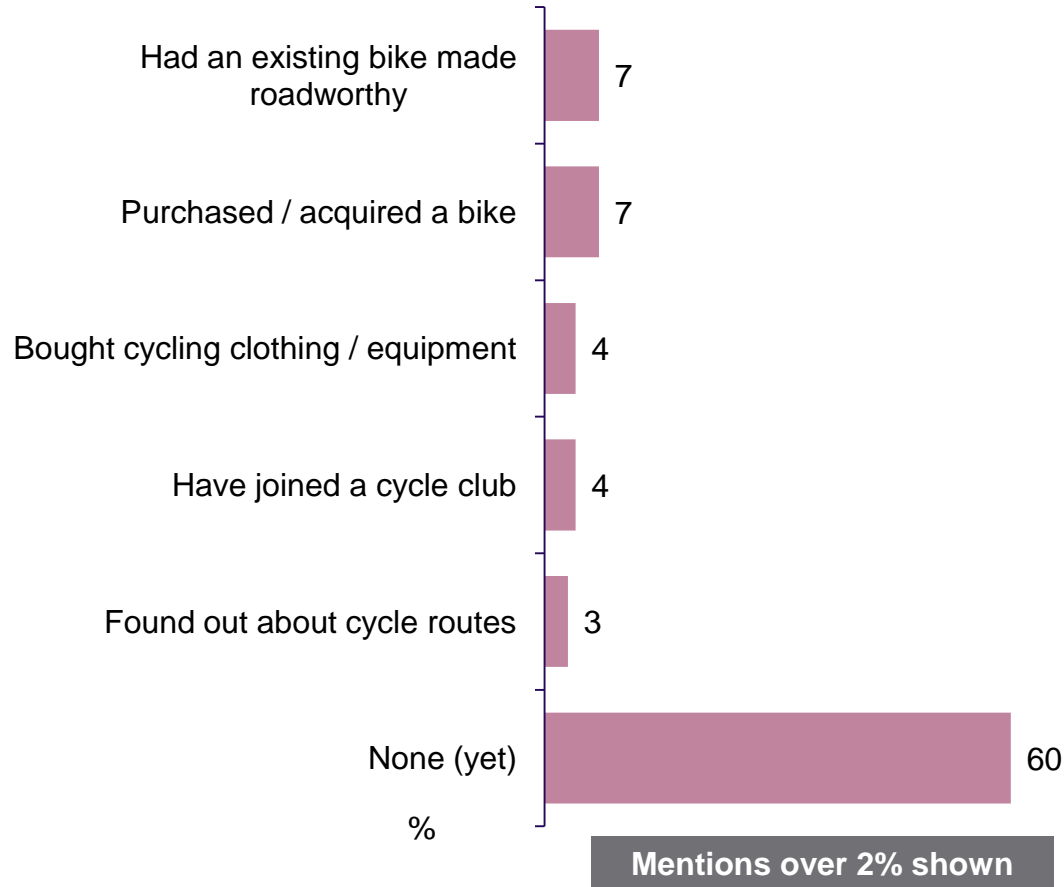
Base: All cyclists (505)



# Purchasing or servicing equipment are the most commonly taken steps towards cycling more

## Steps taken towards cycling more

**Primed\* and preparation cyclists**



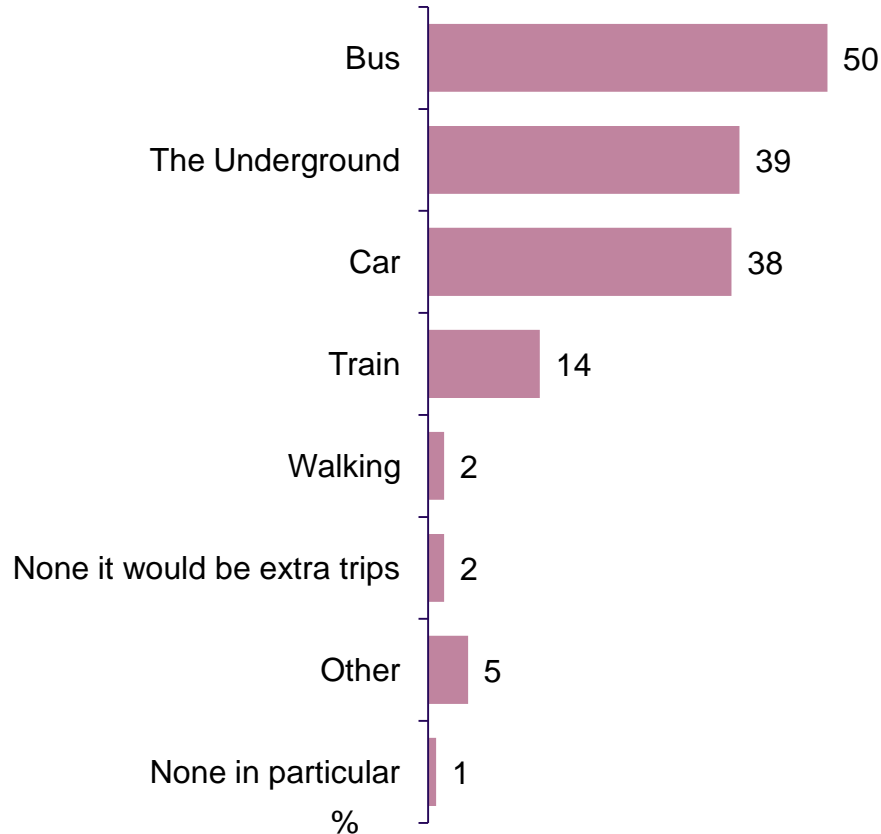
E1: What practical steps have you taken towards cycling more in the next 12 months?  
Base: Those “thinking about...decided to...are setting things in place to...” cycle more (133)  
\* Includes ‘primed’ individuals except those who ‘were doing this but couldn’t stick to it’ at B1



# Bus, Tube and car trips are more likely to be replaced by Londoners cycling more

## Potential modal shift

Primed\* and preparation cyclists



E5: What type of transport, if any, would you use less if you cycled more?

Base: Those "thinking about...decided to...are setting things in place to..." cycle more (133)

\* Includes 'primed' individuals except those who 'were doing this but couldn't stick to it' at QCYCMOR1

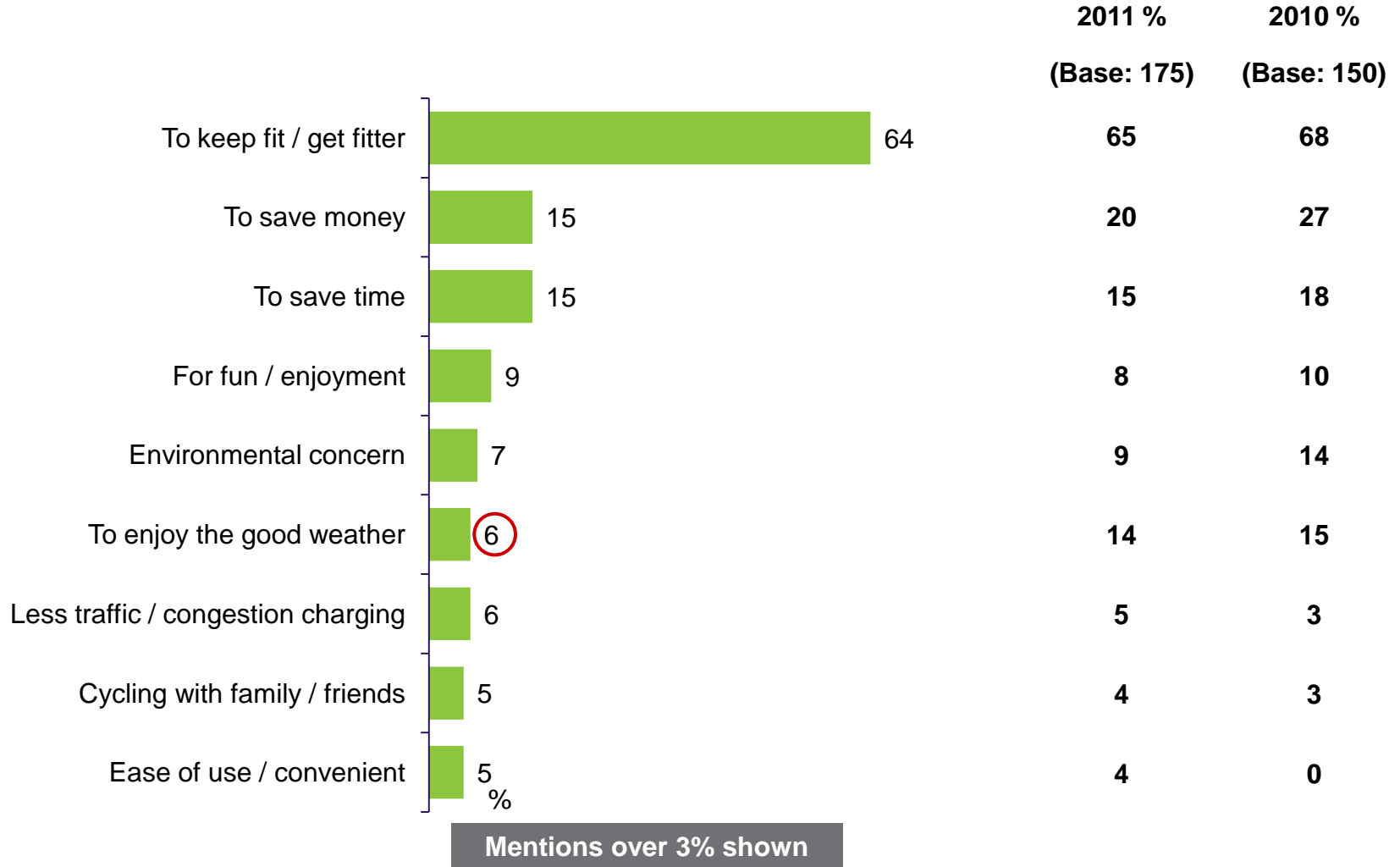




# Getting fit remains the strongest motivator for non-cyclists

## Motivations for taking up cycling

**Primed and preparation non-cyclists**



**○ Significantly lower than 2011**

E4. Why are you considering taking up cycling? Base: Primed and preparation non-cyclists (165) at B2.

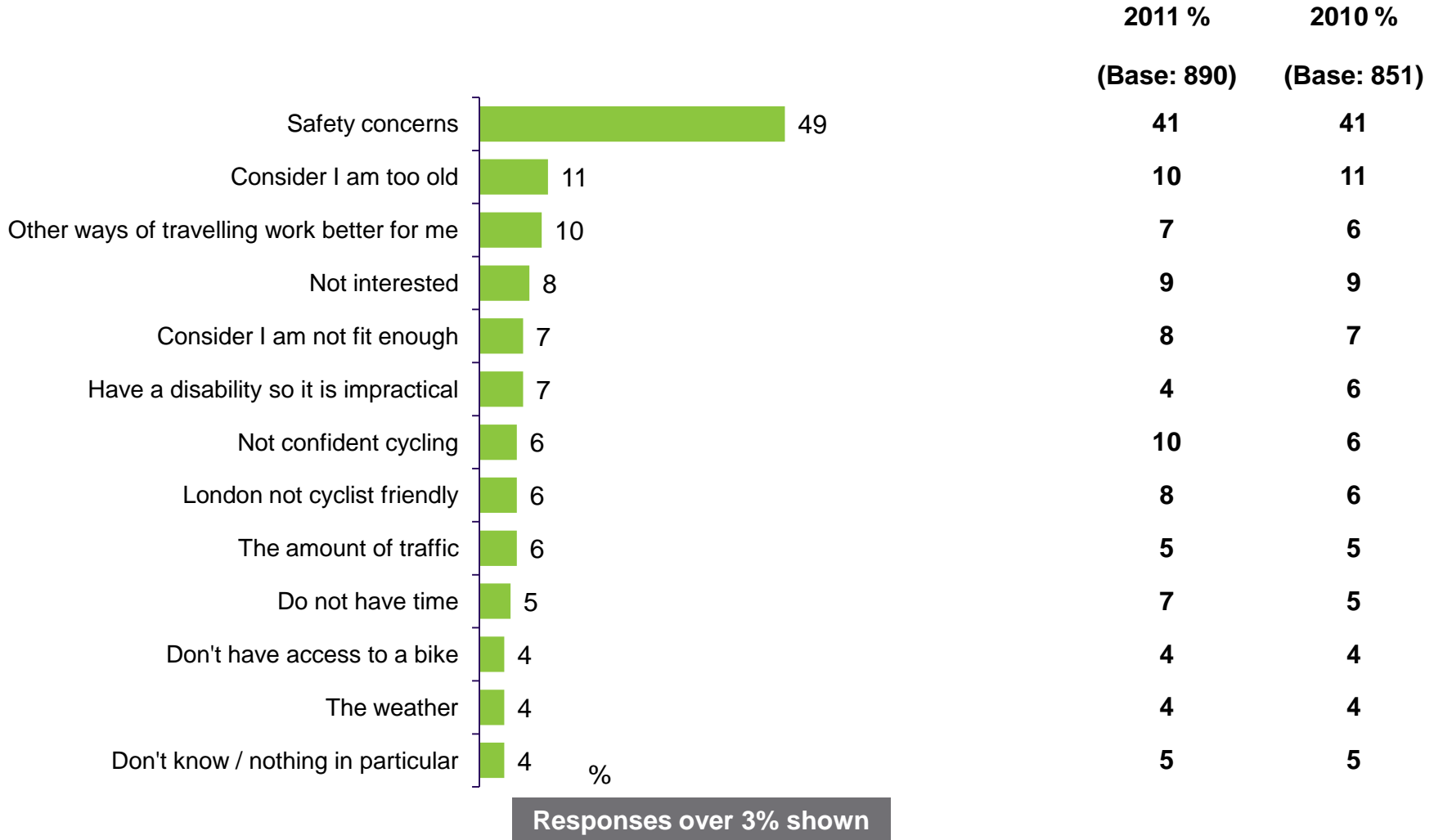
NB: prior to 2012 fewer non-cyclists were asked this question due to changes in groupings in 2012



# Safety concerns remain most likely to put off non-cyclists from taking it up

## Deterrents to taking up cycling

All non-cyclists



E7: What deters you from taking up cycling?

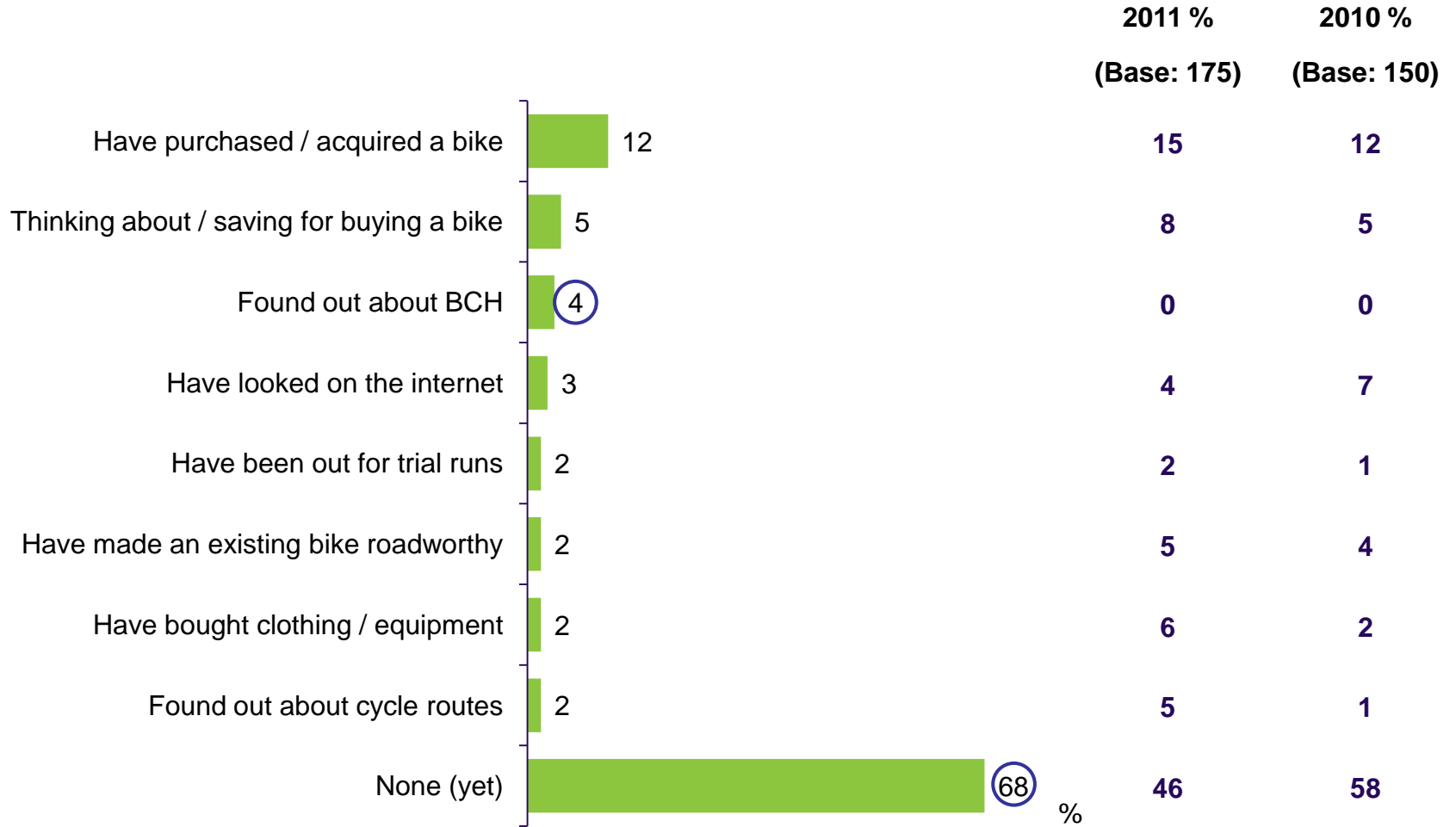
Base: Non-cyclists (821)



# Most non-cyclists have taken no steps towards taking up cycling

## Steps taken towards taking up cycling

**Primed and preparation non-cyclists**



Responses over 1% shown

○ Significantly higher than 2011

E2: What practical steps, if any, have you taken towards taking up cycling in the next 12 months? Base: Primed and preparation non-cyclists (165) at B2.

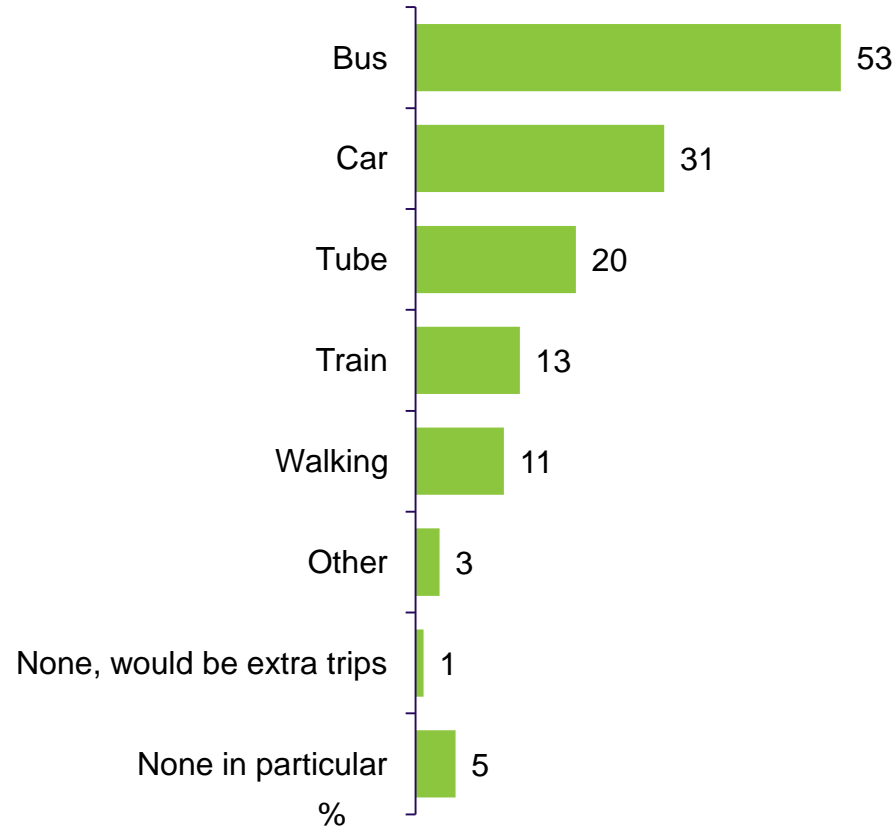
NB: changes in groupings in 2012 mean findings are not directly comparable



# Non-cyclists believe they would be most likely to use the bus less if they took up cycling

## Potential modal shift

**Primed and preparation non-cyclists**



*E6: What type of transport, if any, would you use less if you take up cycling?*

*Base: Primed and preparation non-cyclists (165) at B2.*

*NB: changes in groupings in 2012 mean findings are not directly comparable*



# Motivations

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# Motivations

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- Cycling remains relatively unappealing to many: of the six modes Londoners were asked about, cycling is the least appealing with just 39% considering it an appealing mode of transport (45% consider it 'unappealing')
  - Fewer Londoners regard cycling as appealing this year than last (when the figures were almost exactly reversed – 46% appealing, 39% unappealing)
  
- Cyclists are understandably more likely to see cycling as appealing, with 72% stating this compared to 32% of non-cyclists
  
- Making journeys by bike through one's local area appeals more to both cyclists and non-cyclists than cycling outside one's local area and within central London (87% of regular cyclists find making local journeys appealing, 64% for occasional cyclists)
  - Half of regular cyclists find cycling to make longer journeys, or trips in central London appealing, while around two thirds of occasional cyclists find these journeys unappealing



# Perceptions

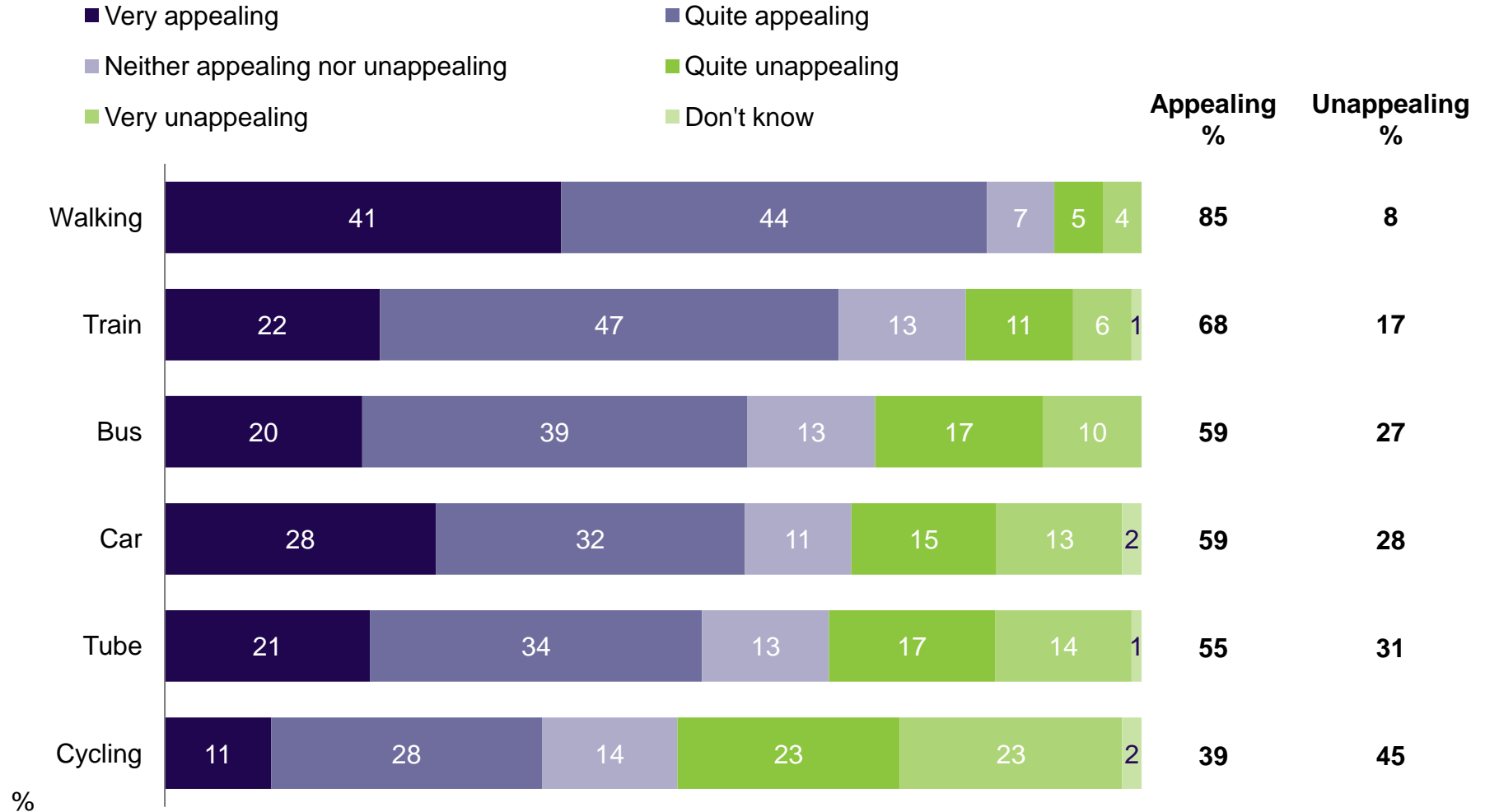
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- Between 80% and 90% of Londoners state that cycling is becoming more popular, that it is an interesting way to travel, that it is enjoyable, it is a convenient way of getting around, and it is the fastest way to make short journeys
- However, concerns about safety remain. 91% feel cyclists are vulnerable to other road users and 90% believe traffic makes people afraid of cycling on the streets of London
- Attitudes towards cyclists have remained fairly level over time.
  - Negative perceptions amongst non-cyclist remain: while 85% of non-cyclists consider cyclists to be fit, 50% believe cyclists to be dangerous, while 39% disagree that they are 'considerate', 42% disagree they are 'law-abiding', and 43% disagree that they are 'like you'
- Regular cyclists are more likely to feel confident cycling on London's roads than occasional cyclists. 78% of regular cyclists feel confident this way compared to just 37% of occasional cyclists



# Cycling is the least appealing mode of transport, with under half considering it appealing

## Appeal of cycling compared to other modes



A4: For each means of travel that I read out, I would like you to tell me how appealing or unappealing you find it. So firstly what about travelling by XXX? Would you say that is ....?

Base: all (1,326)





# Cycling is less appealing this year compared with 2011

## Appeal of cycling compared to other modes

	Appealing			Unappealing		
	2012	2011	2010	2012	2011	2010
Walking	85%	85%	83%	8%	8%	9%
Train	68%	68%	63%	17%	17%	17%
Bus	59%	58%	53%	27%	26%	31%
Car	59%	54%	54%	28%	33%	30%
Tube	55%	50%	45%	31%	34%	38%
Cycling	39%	46%	43%	45%	39%	42%

 Significantly lower than 2011

 Significantly higher than 2011

A4: For each means of travel that I read out, I would like you to tell me how appealing or unappealing you find it. So firstly what about travelling by XXX? Would you say that is ....?

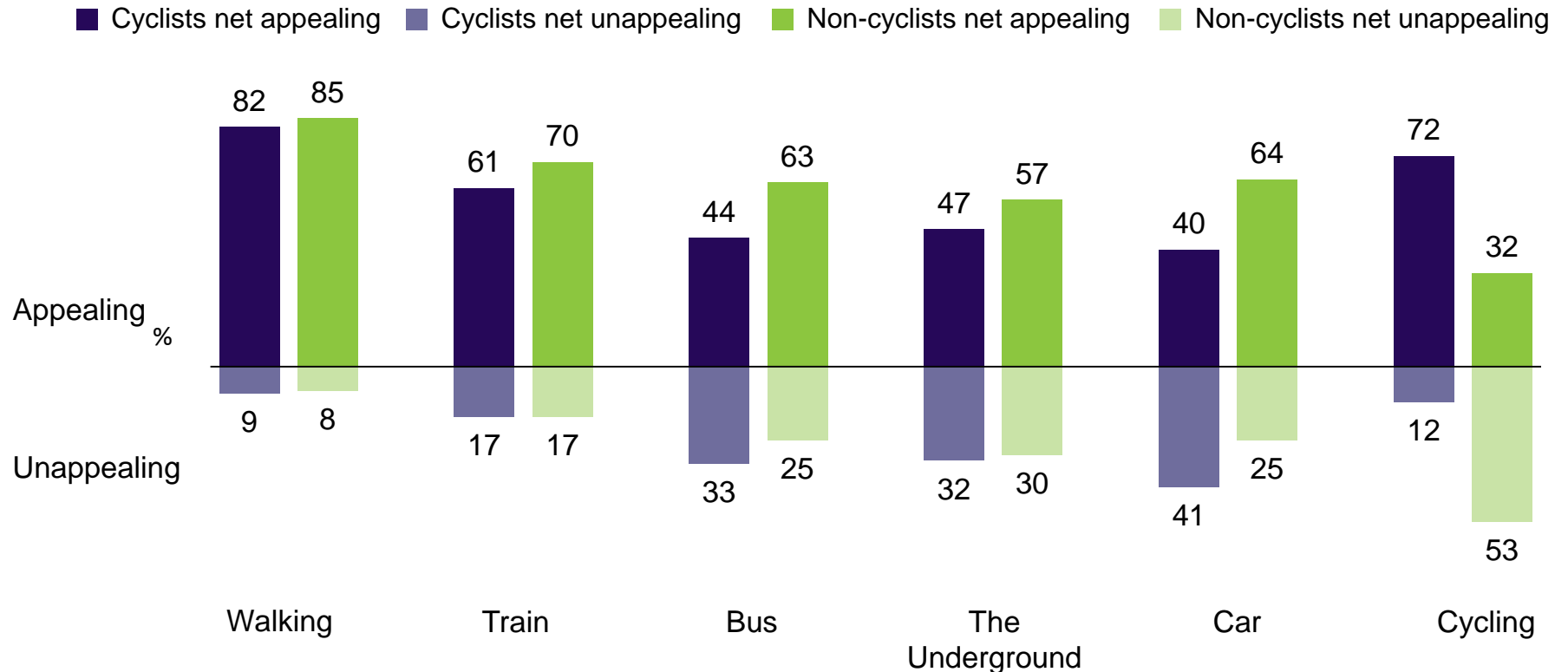
Base: all (2012: 1,326; 2011: 1,066; 2010: 1,007)



# More than half of non-cyclists find cycling unappealing (however, a third do find it appealing)

## Appeal of cycling compared to other modes

### Cyclist and non-cyclists



A4: For each means of travel that I read out, I would like you to tell me how appealing or unappealing you find it. So firstly what about travelling by XXX? Would you say that is ....?

Base: all cyclists (505), all non-cyclists (821)



# There has been little change in the appeal of the various modes among cyclists over the last year

Appeal AMONG CYCLISTS of different modes of transport

	Appealing			Unappealing		
	2012	2011	2010	2012	2011	2010
Walking	82%	83%	84%	9%	7%	7%
Train	61%	58%	54%	17%	18%	19%
Bus	44%	49%	48%	33%	28%	33%
Car	40%	39%	38%	32%	37%	43%
Tube	47%	38%	40%	41%	40%	46%
Cycling	72%	80%	76%	12%	10%	12%

 Significantly lower than 2011

 Significantly higher than 2011

A4: For each means of travel that I read out, I would like you to tell me how appealing or unappealing you find it. So firstly what about travelling by XXX? Would you say that is ....?

Base: all cyclists (2012: 505; 2011: 176; 2010: 156)



# The views of non-cyclists have changed little over the past year; however, cycling is considered even less appealing than in 2011

## Appeal AMONG NON-CYCLISTS different modes of transport

	Appealing			Unappealing		
	2012	2011	2010	2012	2011	2010
Walking	85%	86%	83%	8%	8%	9%
Train	70%	70%	64%	17%	17%	16%
Bus	63%	60%	54%	25%	25%	30%
Car	64%	57%	57%	25%	32%	28%
Tube	57%	52%	46%	30%	33%	36%
Cycling	32%	38%	37%	53%	46%	48%

 Significantly lower than 2011

 Significantly higher than 2011

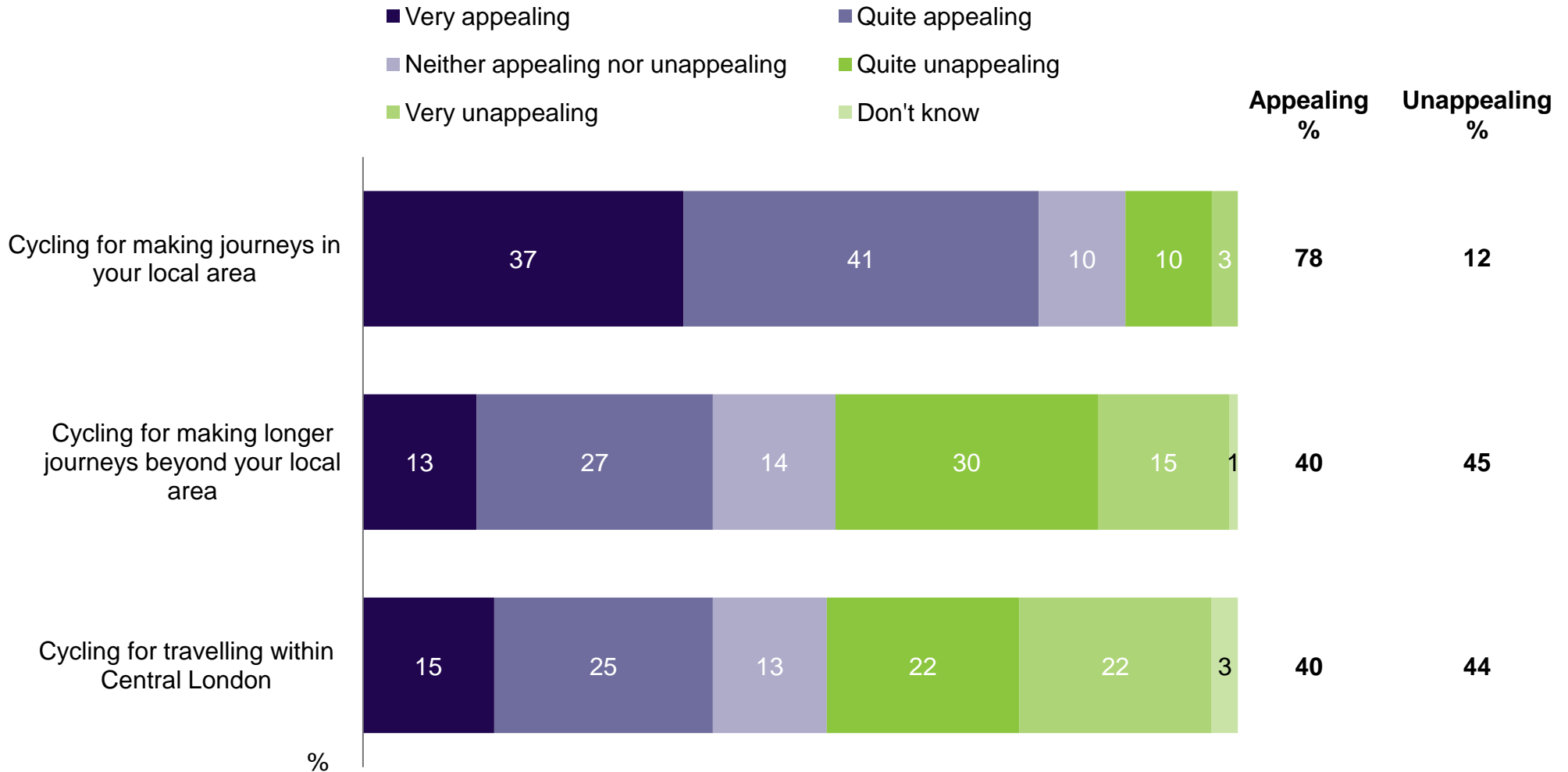
QC3: For each means of travel that I read out, I would like you to tell me how appealing or unappealing you find it. So firstly what about travelling by XXX? Would you say that is ....?

Base: all non-cyclists (2012: 821; 2011: 890; 2010: 851)



# Cycling to complete journeys in the local area appeals most to cyclists compared to journeys in central London and outside the local area

## Appeal of cycling in specific scenarios - cyclists



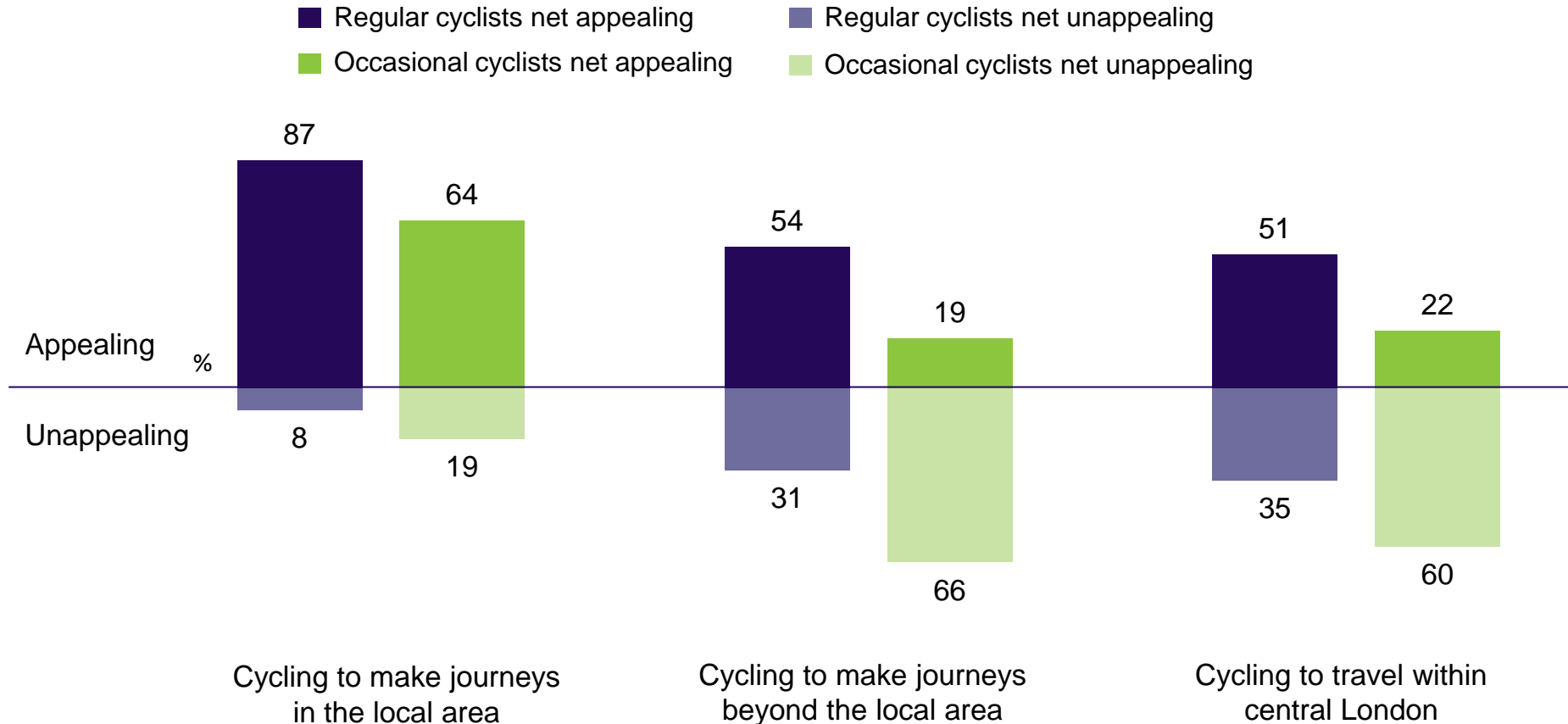
A5: Thinking specifically about cycling, can you please tell me how appealing or unappealing you find it for XXX. Do you find it ...?

Base: all cyclists (482)



# More than half of occasional cyclists find journeys beyond their local area and in central London unappealing

## Appeal of cycling in specific scenarios – cyclists



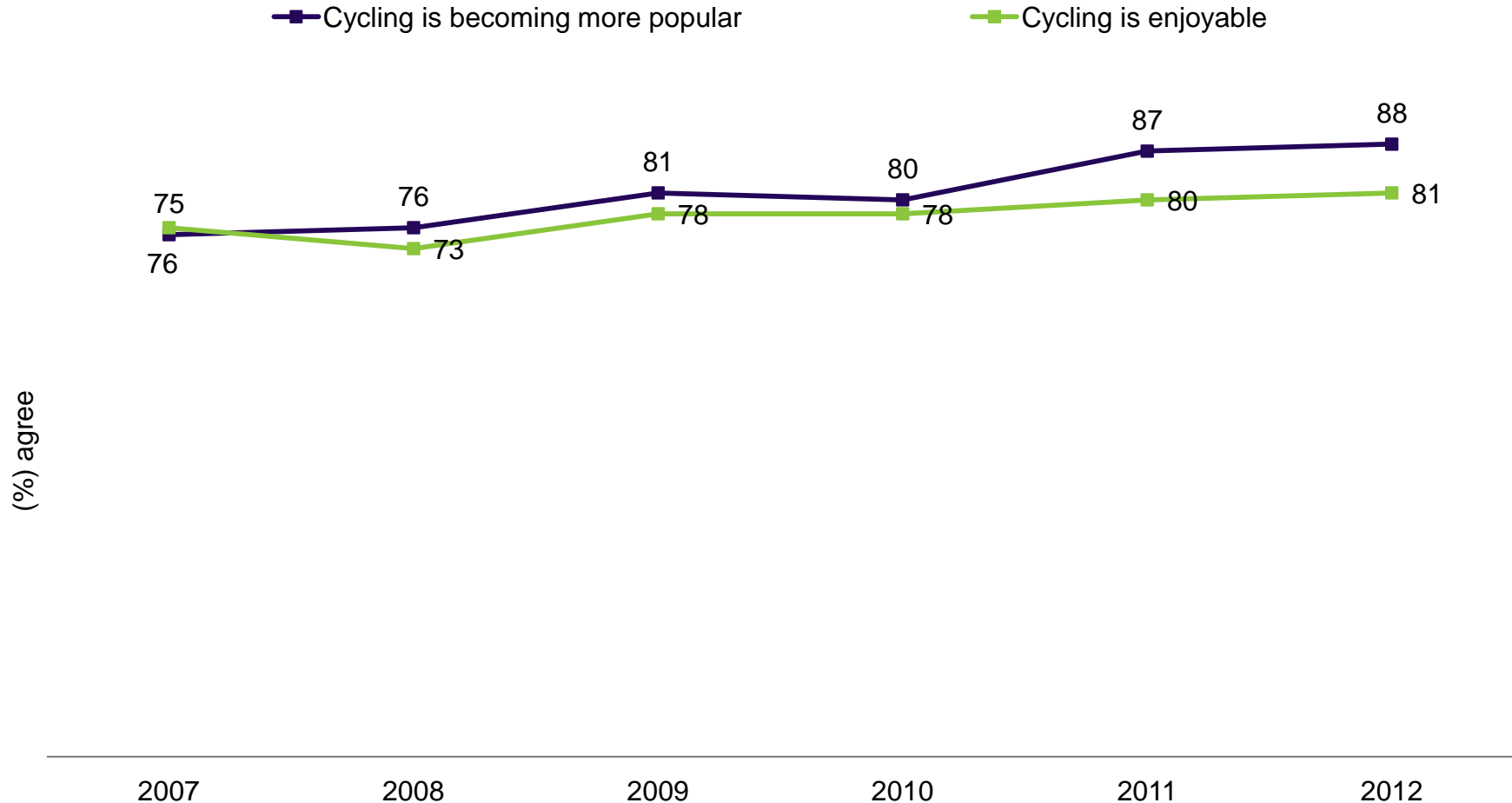
A5: Thinking specifically about cycling, can you please tell me how appealing or unappealing you find it for XXX. Do you find it ...?

Base: regular cyclists (286) and occasional cyclists (196)



# Most Londoners agree that cycling is enjoyable and becoming more popular – little change over the past year

## Emotional factors



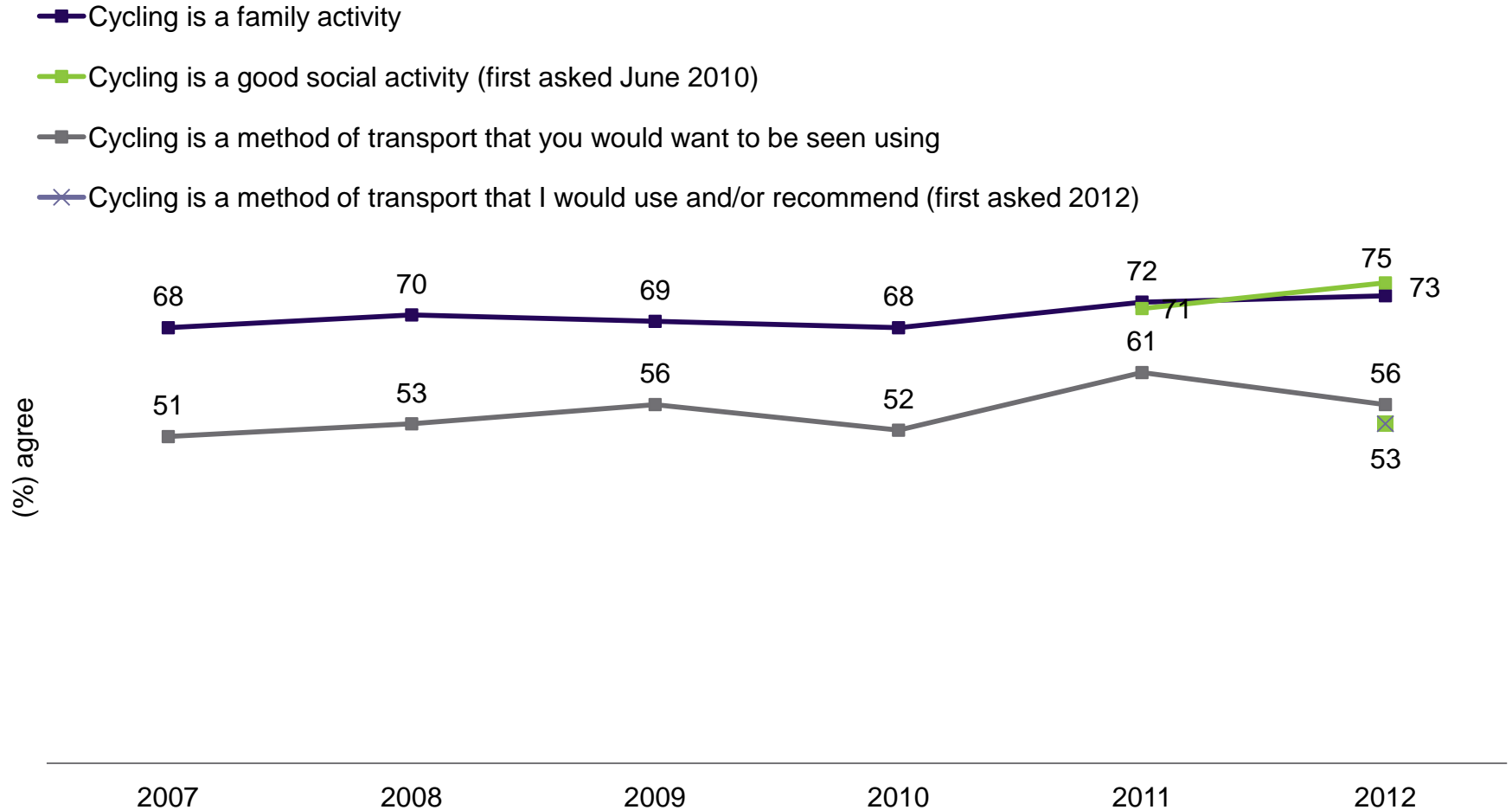
A1: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – 2012 (1,326), 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)



# There has been a slight rise in the proportion of Londoners agreeing that cycling is a good social activity

## Social factors



A1: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

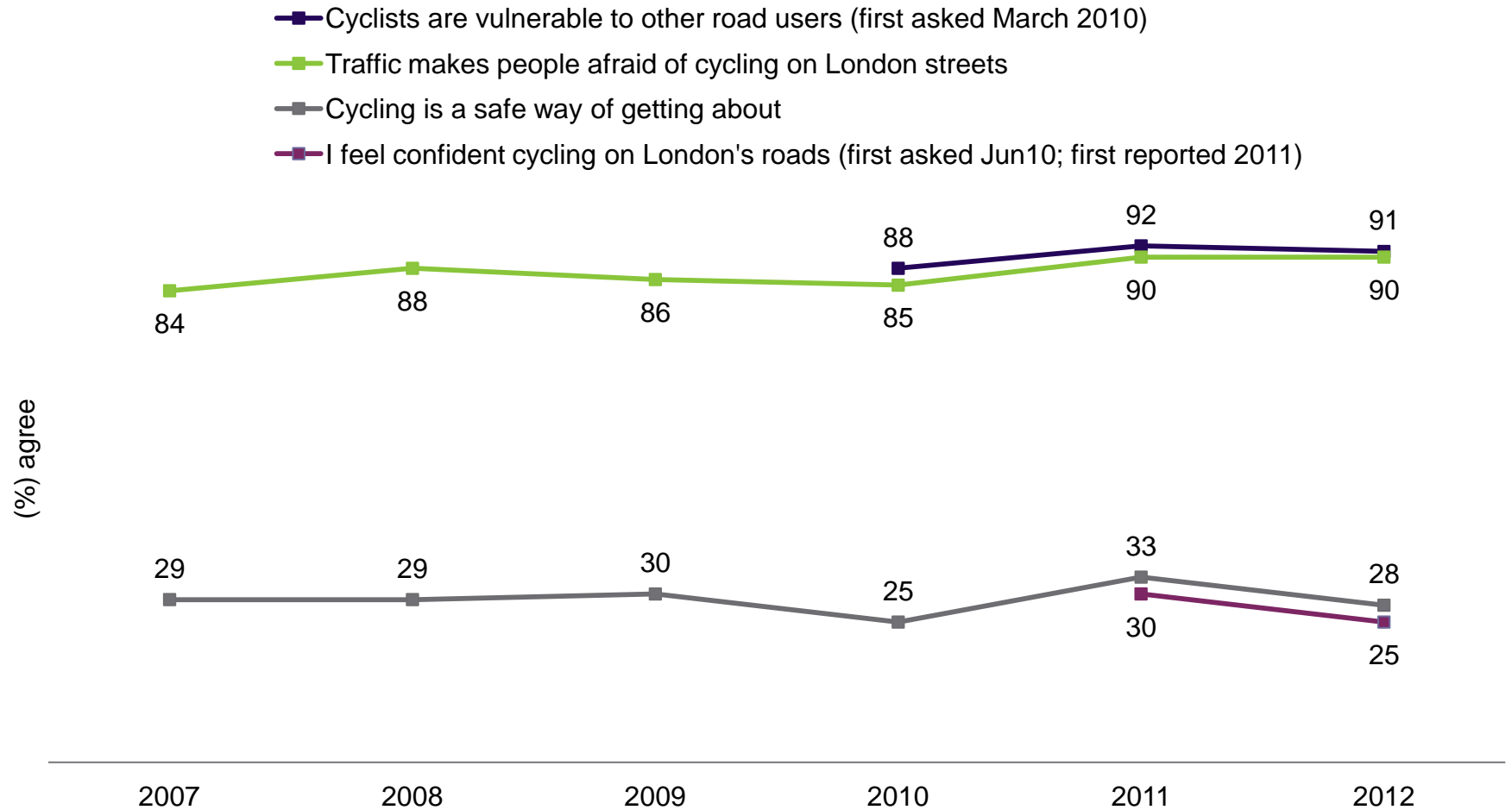
Base: All – 2012 (1,326), 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)





# There have been falls in the proportions agreeing that cycling is safe, or that they feel confident cycling on London's streets

## Confidence factors



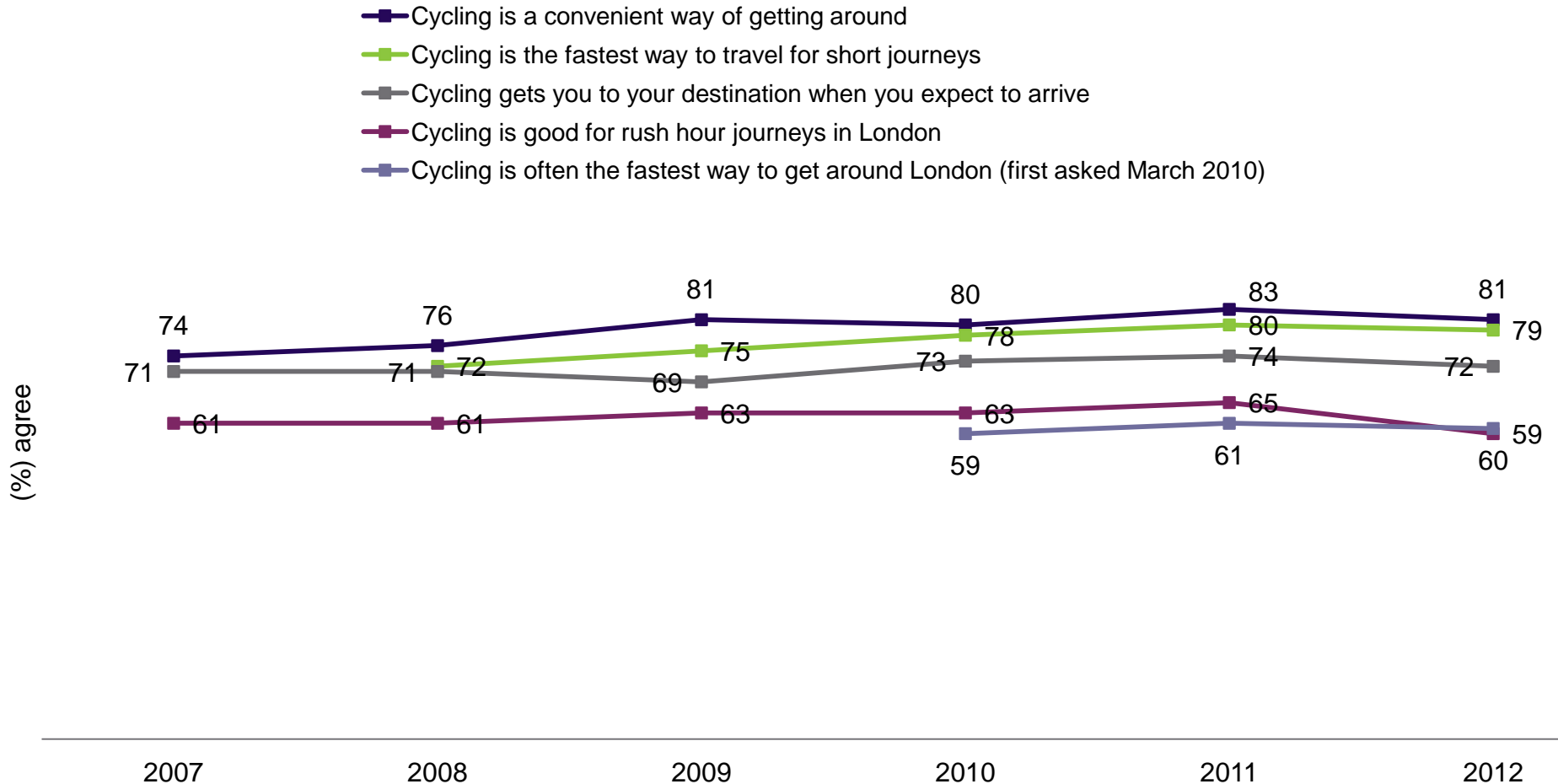
QC2: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – 2012 (1,326), 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)



# Little change in agreement with convenience factor statements over time

## Convenience factors



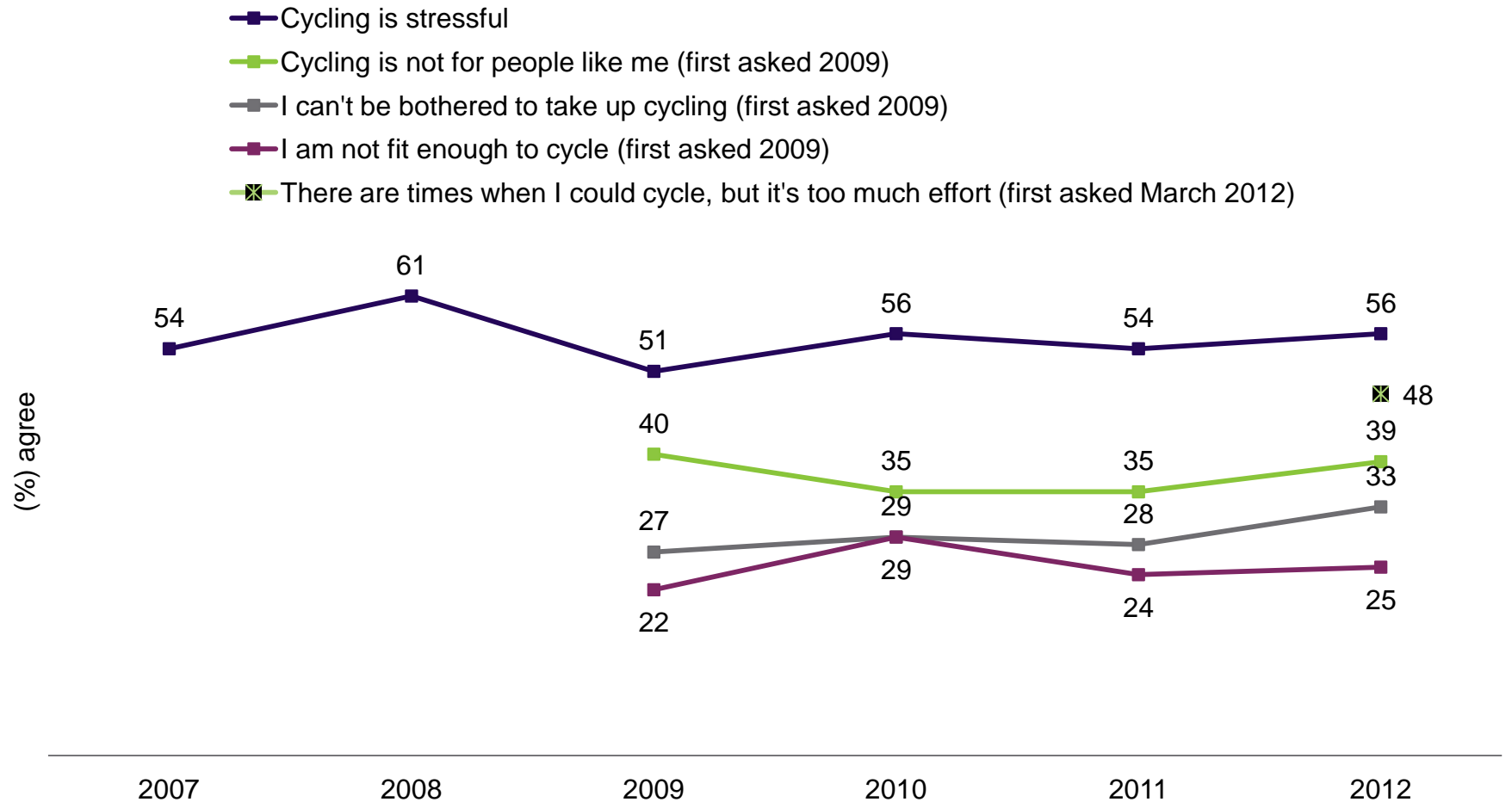
QC2: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – 2012 (1,326), 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)



# There has been a slight strengthening of perceived barriers – almost two fifths now agree that cycling is not for them

## Barrier factors



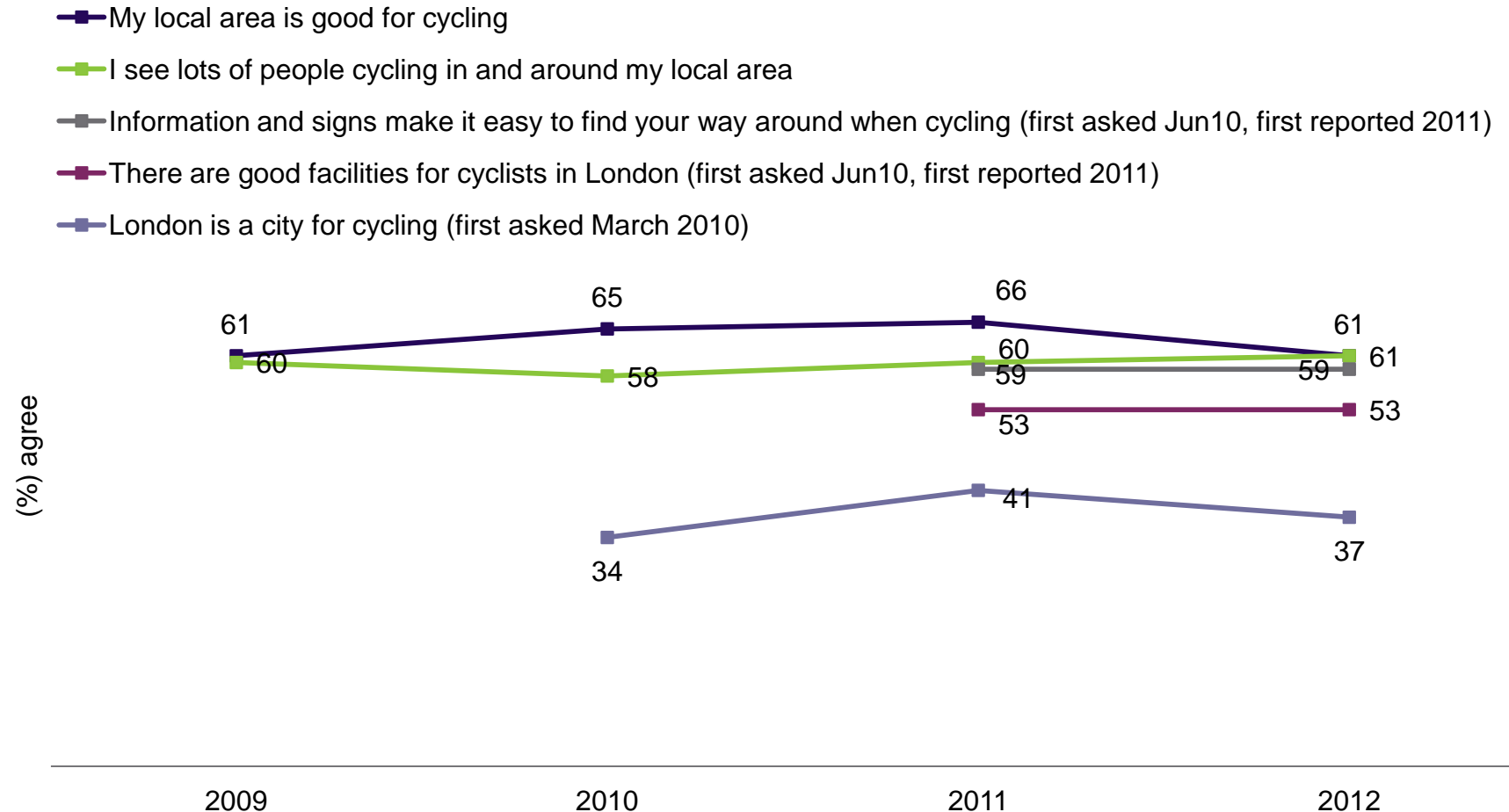
QC2: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – 2012 (1,326), 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)



# The proportion of Londoners agreeing that London is a city for cycling has fallen after a rise last year

## Facility factors



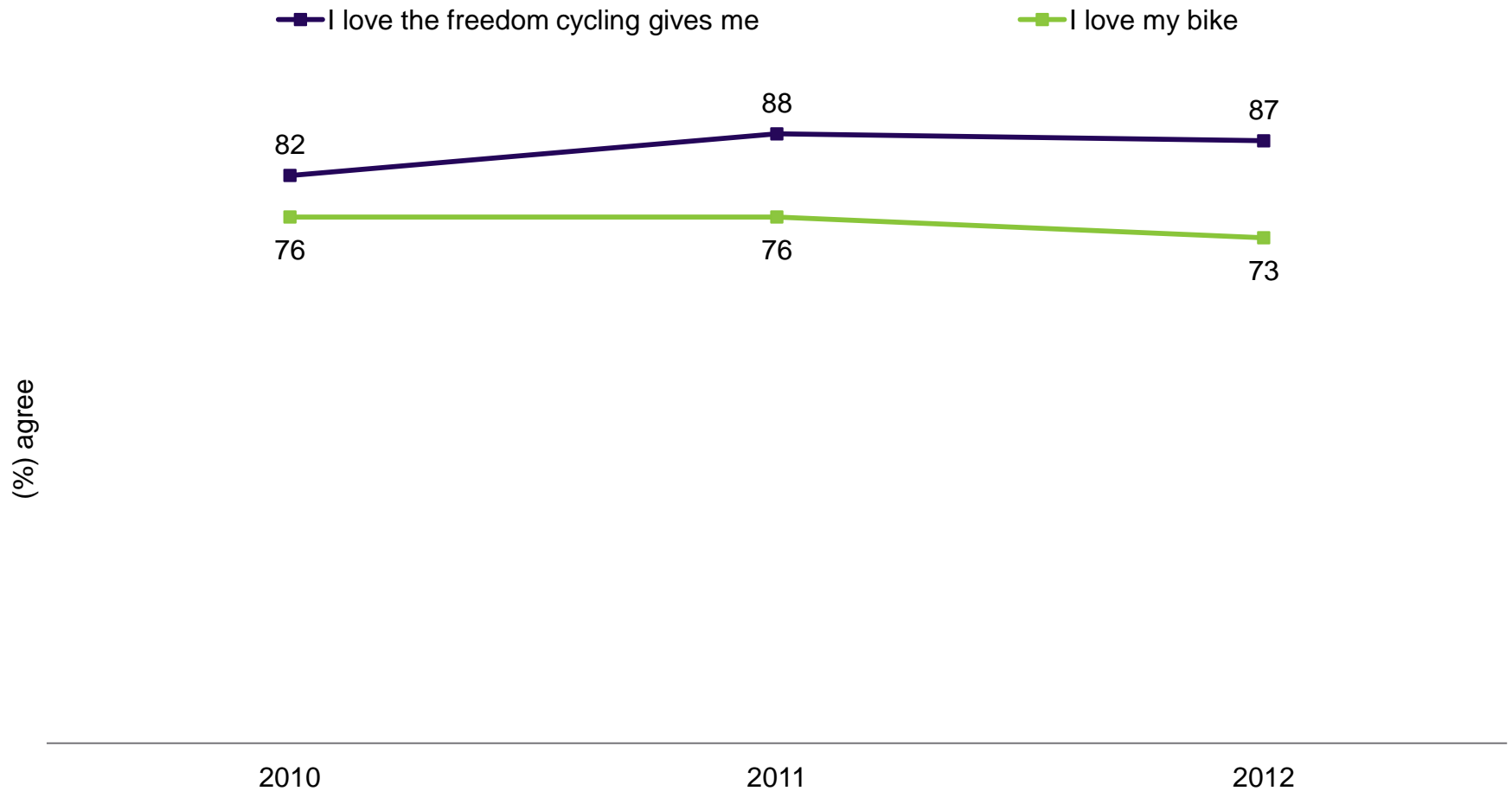
QC2: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – 2012 (1,326), 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)



# Three quarters of London cyclists love their bikes, and almost nine out of ten love the freedom cycling gives them

## Freedom factors

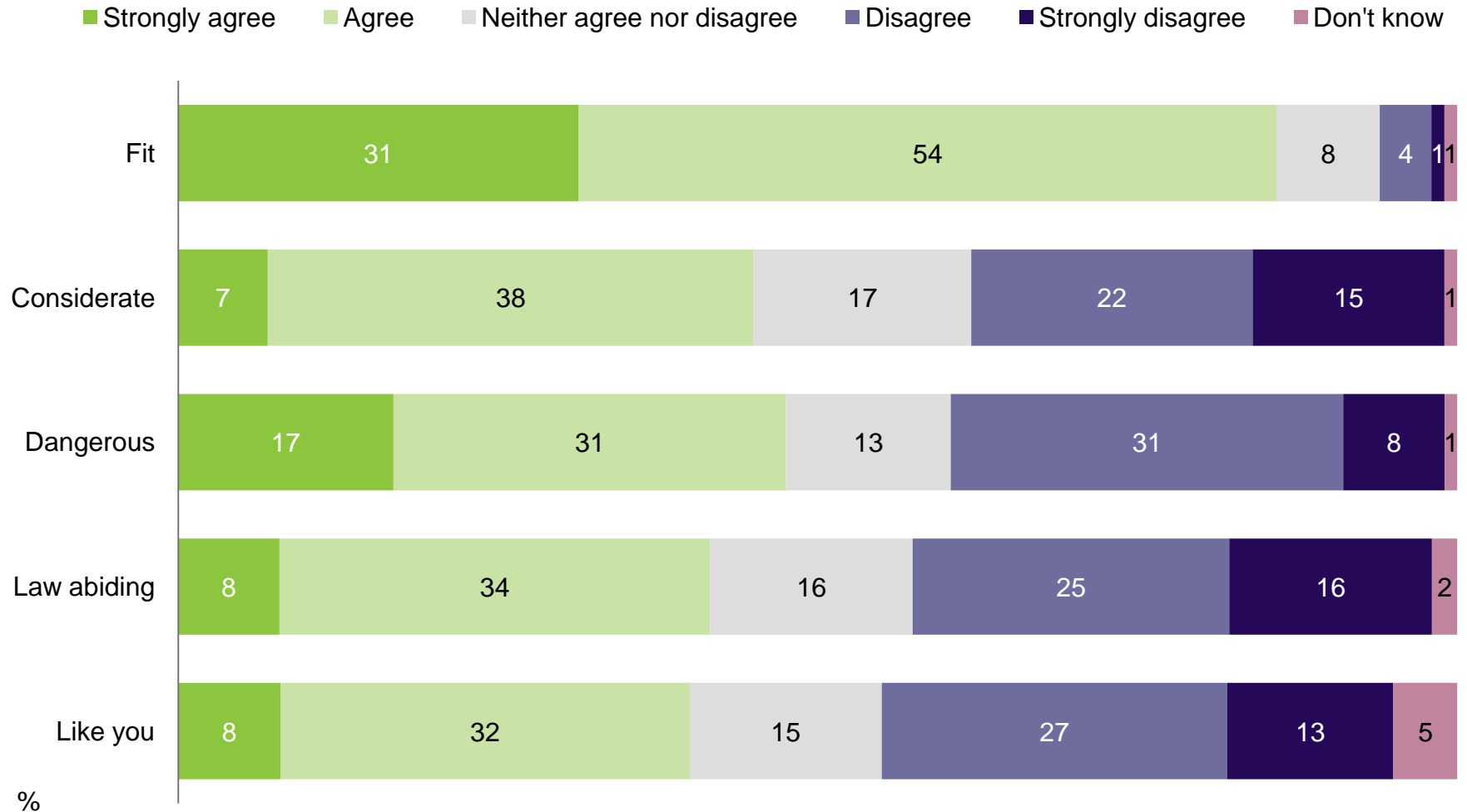


QC2: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London  
Base: 2012 (505), 2011 (176), 2010 (156)



# Most Londoners perceive cyclists to be fit; almost half think they are dangerous

## Attitudes towards cyclists



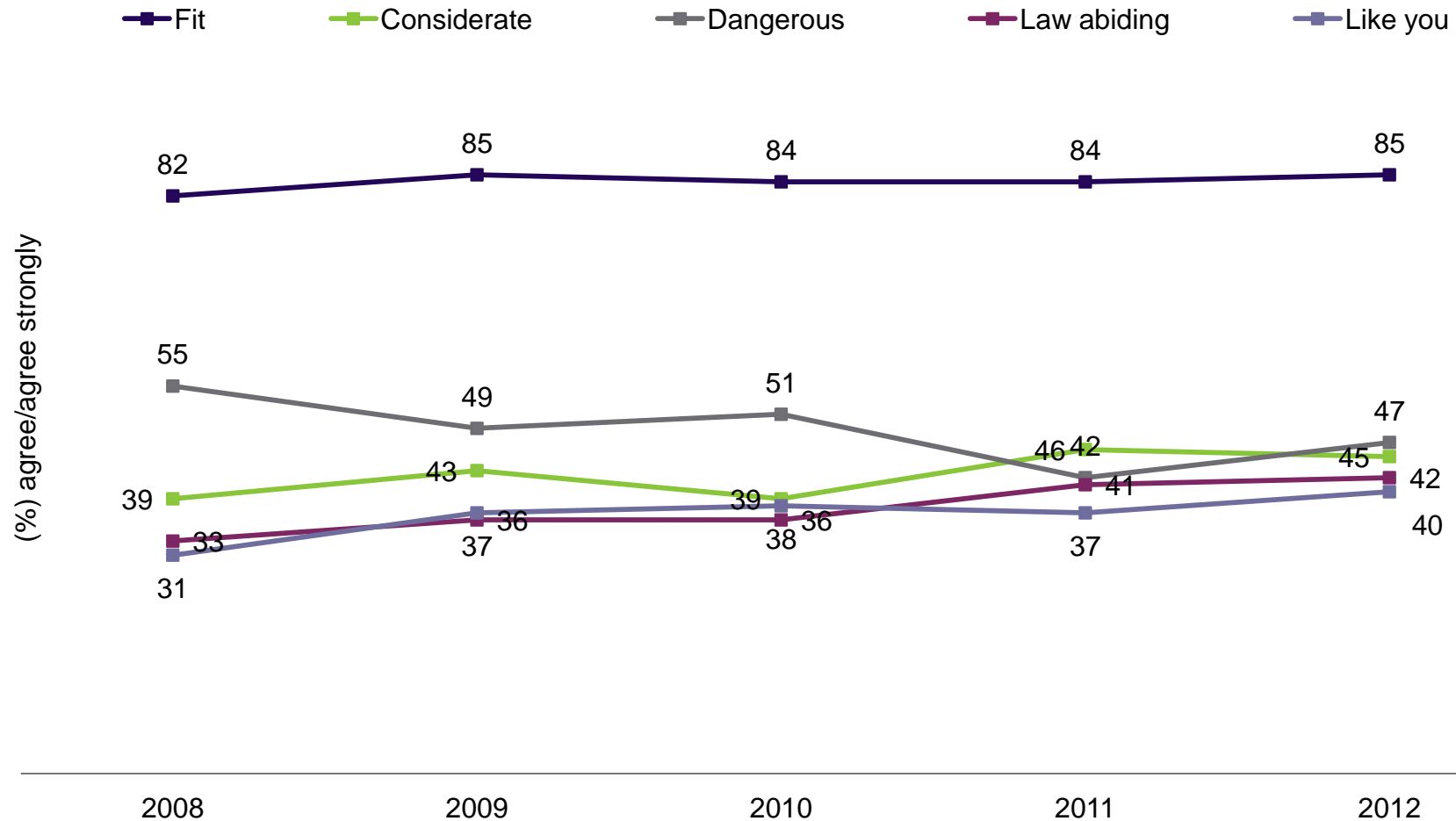
H1: Do you feel that cyclists in general are xxx?

Base: All (1,326)



# After recent falls, the proportion of Londoners agreeing that cyclists are dangerous rose this year

## Attitudes towards cyclists



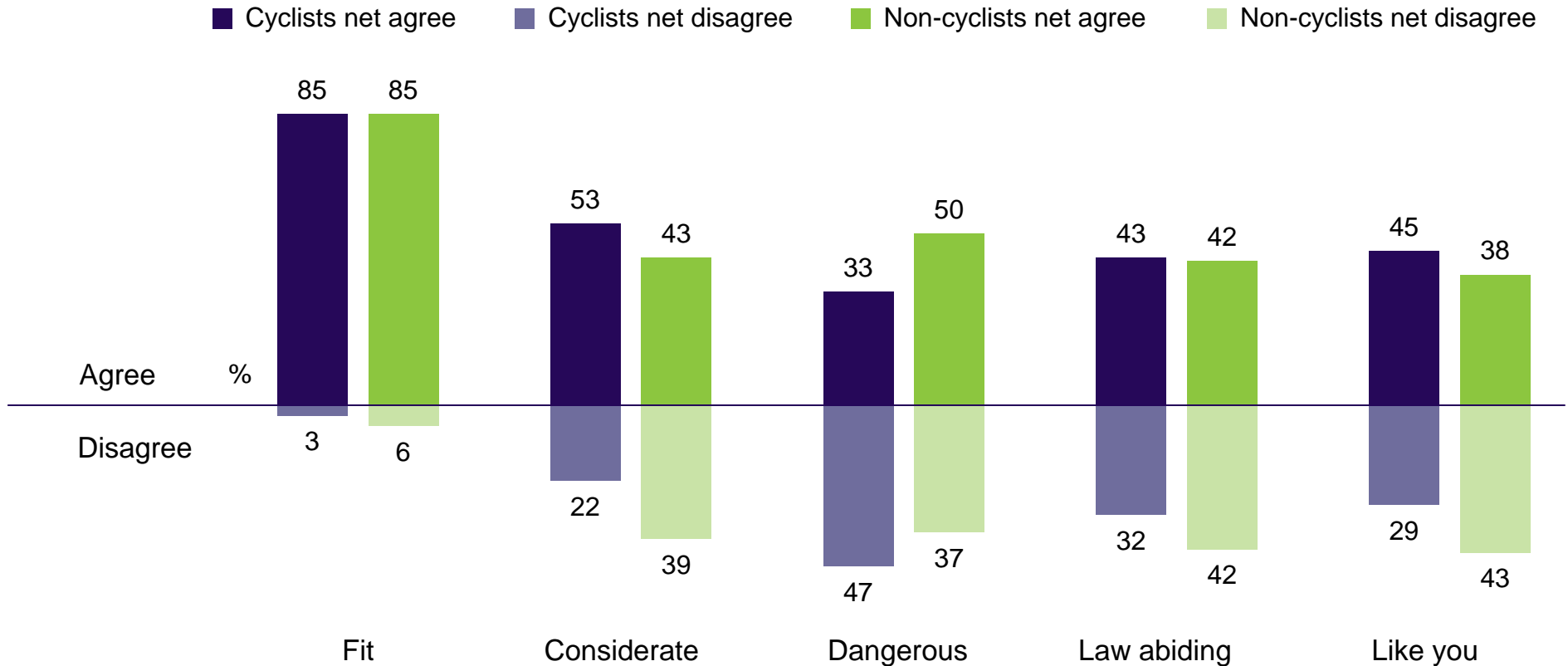
H1: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – 2012 (1,326), 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)



# Half of non-cyclists agree that cyclists are dangerous, compare; they are also more likely to disagree that cyclists are 'law-abiding' or 'like you'

## Cyclist and non-cyclists



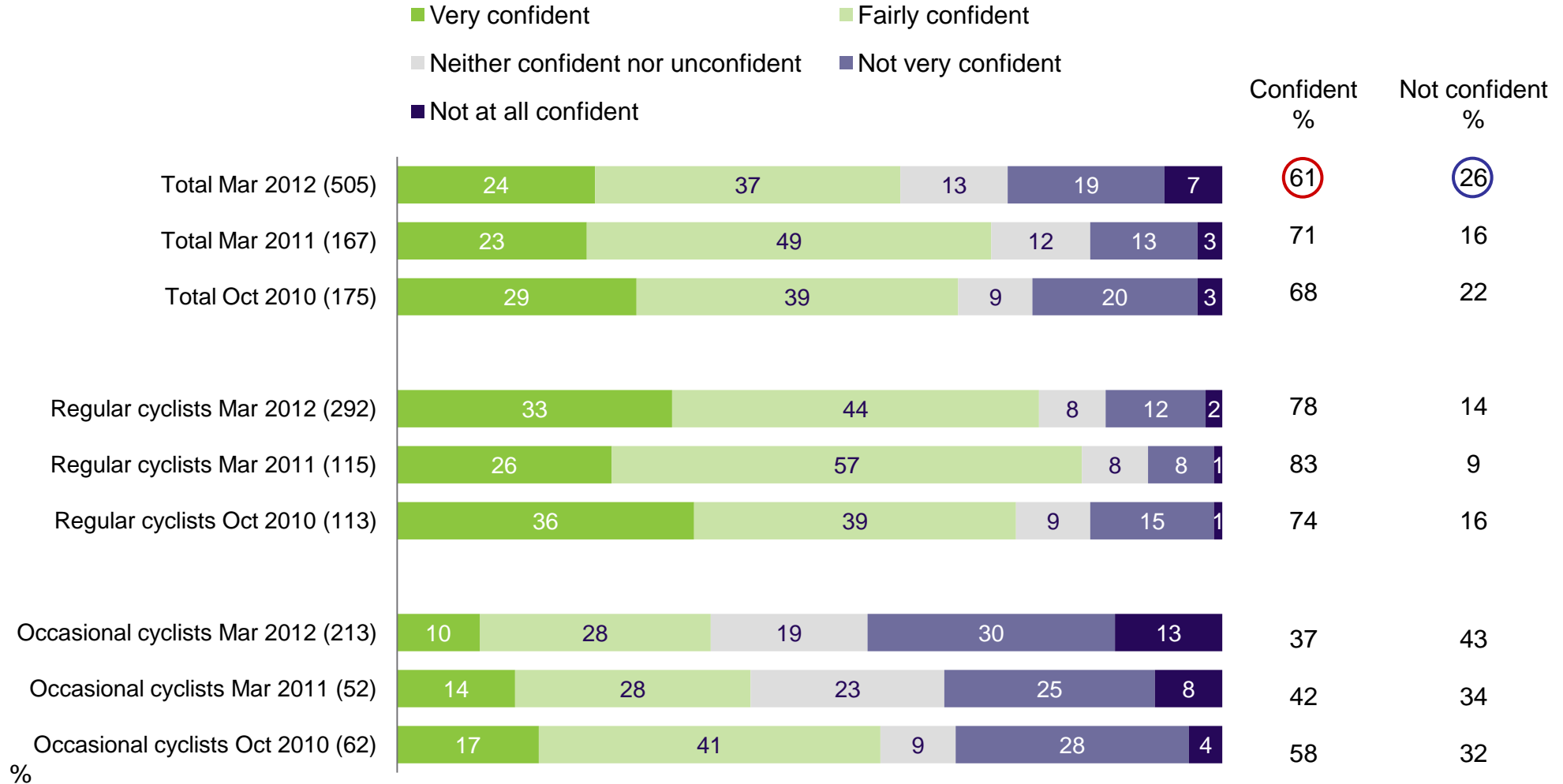
H1: Do you feel that cyclists in general are xxx?

Base: all cyclists (505), all non-cyclists (821)





# Regular cyclists are most confident than those who only cycle occasionally; confidence has dropped since 2011



Significantly lower than 2011

Significantly higher than 2011

J1: Generally, how confident do you feel cycling on London's roads?

Base: Those who have cycled around London within the last 12 months



# Barriers

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# Barriers

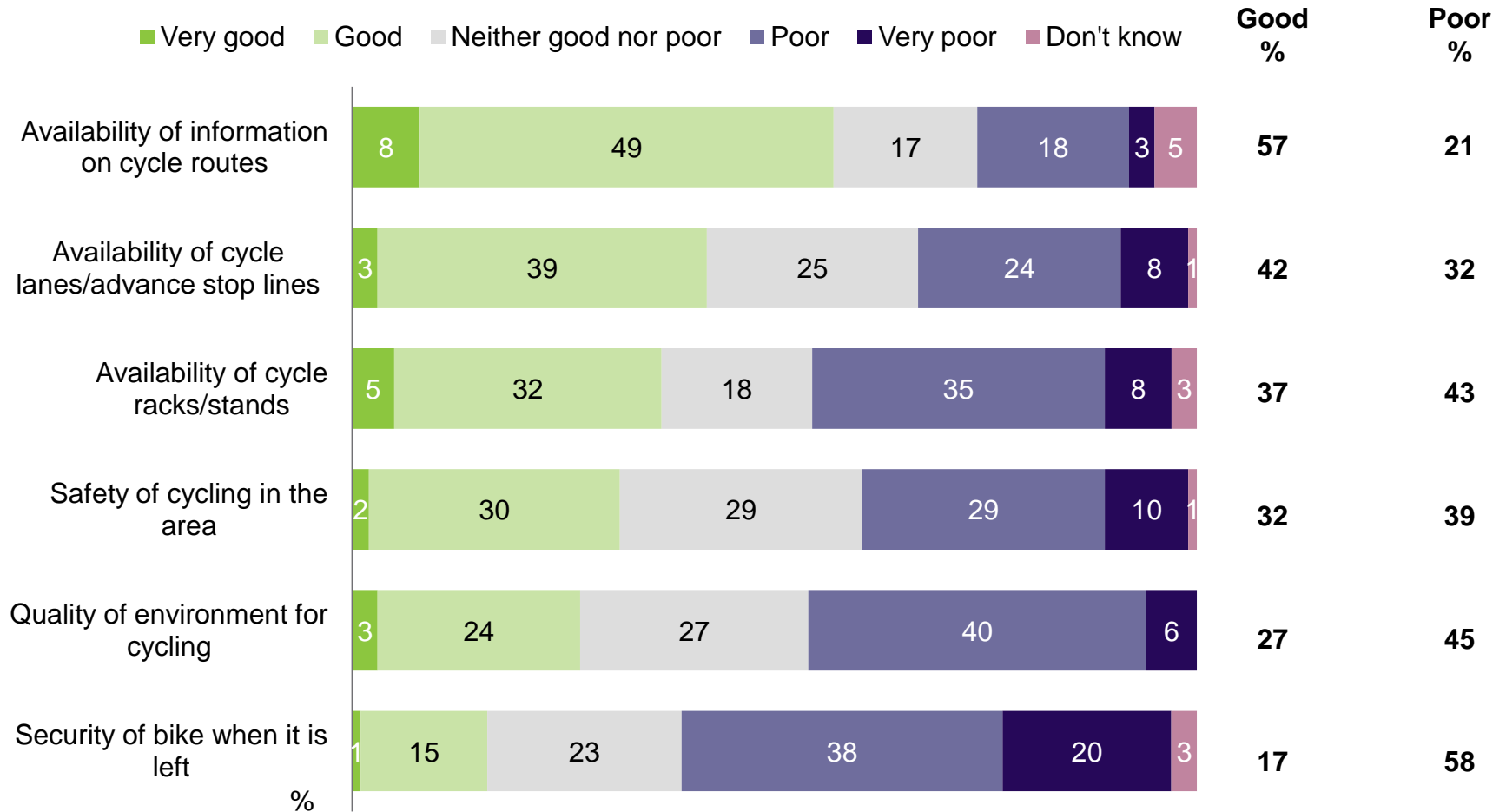
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- There are clear areas where the impact of potential deterrents to cycling can be reduced. Amongst cyclists, 58% consider bike security, and 45% consider the quality of the environment for cycling, to be poor
  - However, there have been two areas of improvement – cyclists are more likely this year to judge the availability of information on cycle routes as good (57%, compared with 46% last year), and likewise with the availability of cycle racks / stands (up from 27% to 37%, so still some way to go)
  
- Amongst those considering taking up cycling, concern about safety is the most deterring factor for 75%
  
- Cyclists actually feel safer when cycling 'in traffic' than when on 'busy roads' in general, perhaps relating to the speed of vehicles on busy roads
  - 84% of regular cyclists said they felt safe cycling in traffic, and 79% of occasional cyclists
  - Whereas only 39% of regular, and 20% of occasional, cyclists felt safe on busy roads



# Cyclists are generally satisfied with the provision of information; availability of cycle lanes / ASLs, and cycle security remain the top issues

## Ranking of potential deterrents



A2: How would you rate the following aspects of cycling in London? Base: Those who have cycled around London within the last 12 months (505)



# There is positive change in cyclists' perceptions of the availability of cycle racks and stands, and information on cycling routes

## Ranking of potential deterrents (trend)

	Good		Poor	
	2012	2011	2012	2011
Availability of information on cycle routes	57	46	21	29
Availability of cycle lanes/advance stop lines	42	42	32	40
Availability of cycle racks/stands	37	27	43	53
Safety of cycling in the area	32	33	39	37
Quality of environment for cycling	27	30	45	45
Security of bike when it is left	17	16	58	65

 Significantly lower than 2011

 Significantly higher than 2011

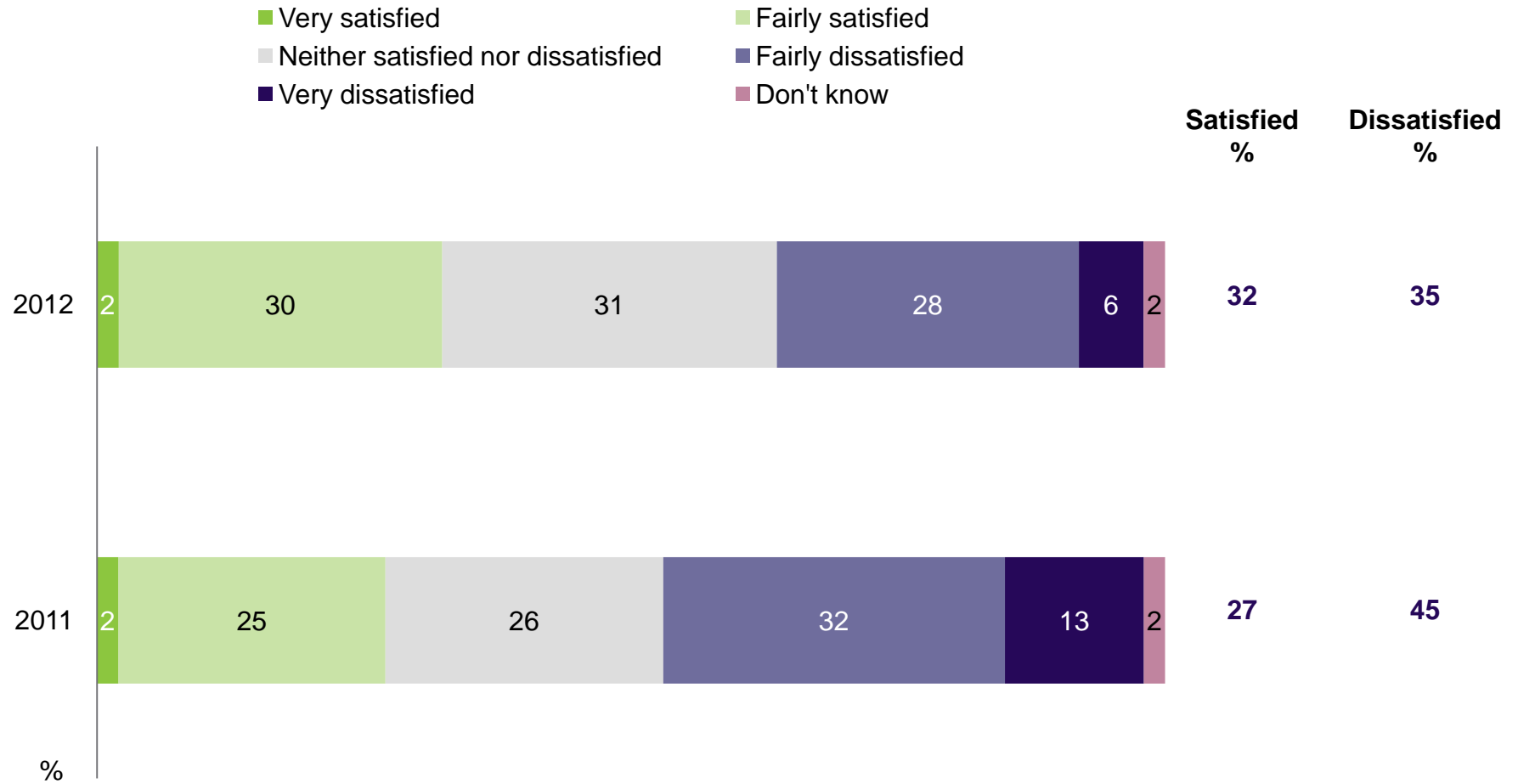
A2: How would you rate the following aspects of cycling in London?

Base: Those who have cycled around London within the last 12 months 2012 (505); 2011 (167)



# There has been a slight rise in satisfaction with cycle parking facilities amongst cyclists, and a fall in dissatisfaction

## Satisfaction with cycle parking facilities



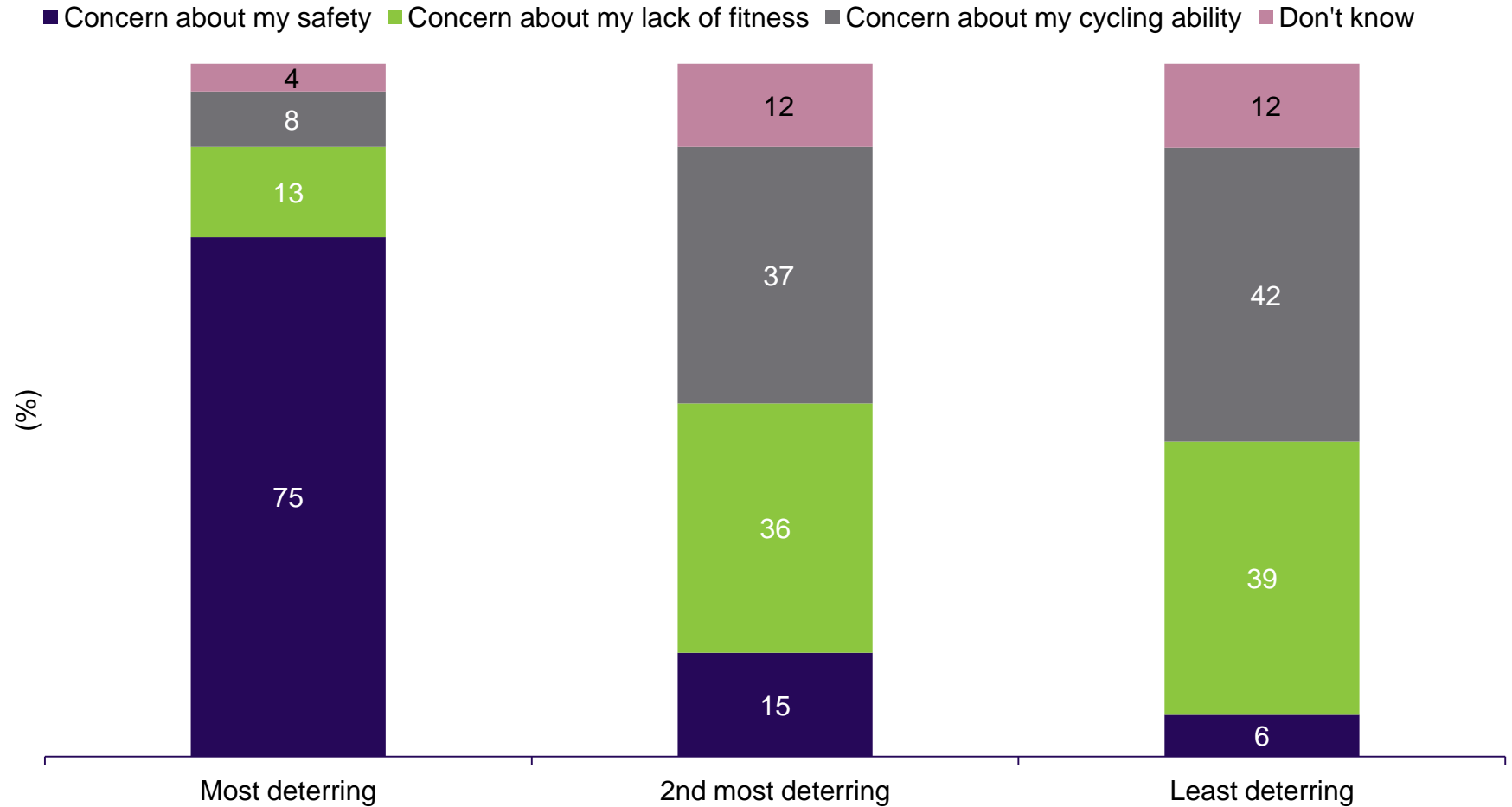
A3: How would you rate your level of satisfaction with the parking facilities for bicycles in London?

Base: Those who have cycled around London within the last 12 months (505), 2011 (167)



# Amongst those thinking about taking up cycling, safety concerns are by far the most significant deterrent

## Ranking of key deterrents



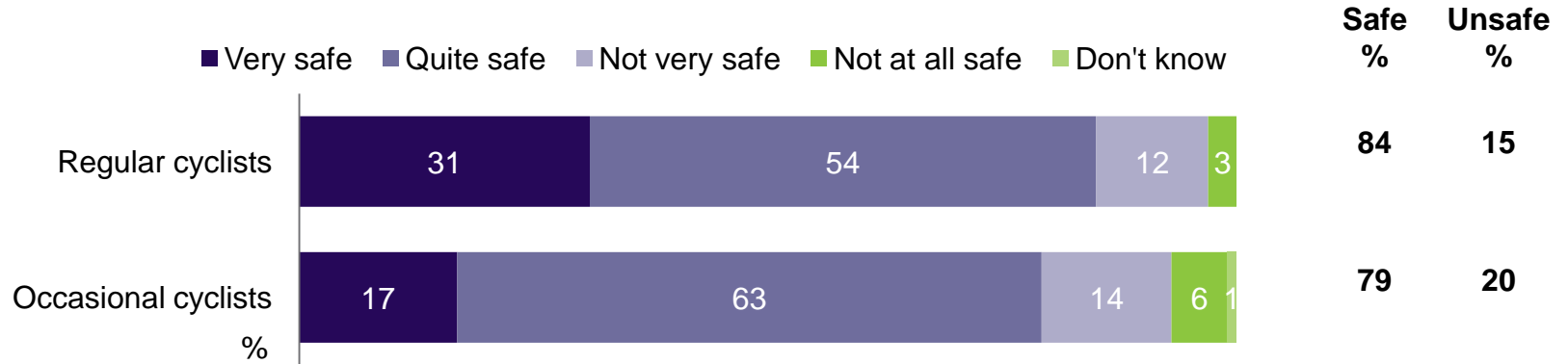
E8: Could you please rank the following one to three in terms of the extent to which they deter you?

Base: All who were thinking about cycling more, had decided to, who were setting things in place and / or are seeking more information about this, or who had started but couldn't stick to it at B2. NB: changes in groupings in 2012 mean findings are not directly comparable

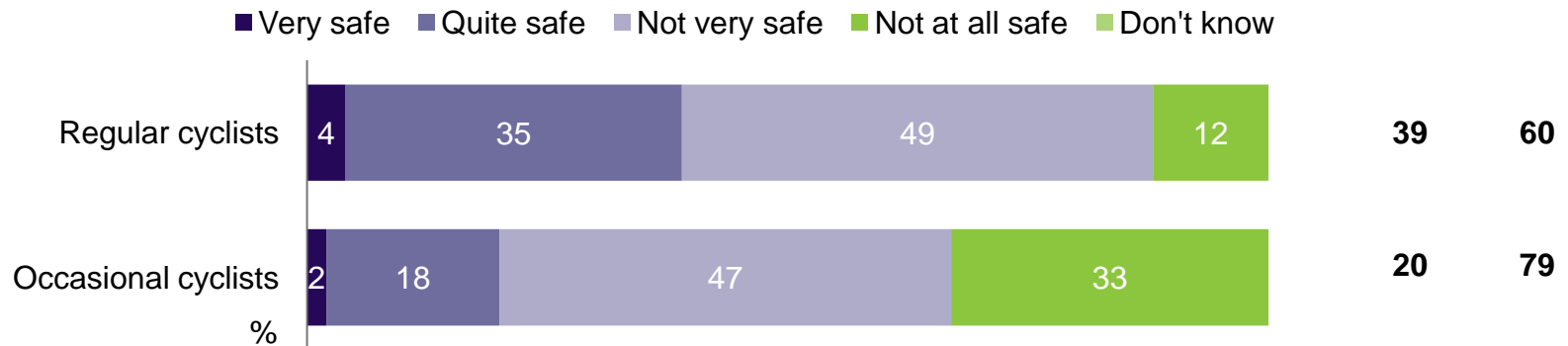


# Cycling on busy roads is more likely to make cyclists feel unsafe than cycling in traffic – particularly for occasional cyclists

## Feeling of safety cycling in traffic



## On busy roads



K6/K7: Thinking about cycling in London, how safe on London's roads do you feel cycling in traffic? / In respect of the traffic you encounter on busy roads, would you say you feel?

Base: Regular cyclists (292), occasional cyclists (213)





# Initiatives

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# → Summary of initiatives

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This section looks at various initiatives in place to promote and facilitate greater cycling in London. These are:

- Barclays Cycle Hire, which was launched in July 2010 and provides access to hire bikes for Londoners and visitors from docking stations located around central London, and more recently the Eastern extension area towards East London
- Barclays Cycle Superhighways, which are a series of cycle routes running from outer to central London. The first two were opened in summer 2010, two more opened in summer 2011, and eight more routes will be active by 2015
- Cycling events, such as the Tour of Britain London leg (an international cycling competition similar to the Tour de France), and Sky Ride (which is open to all)
- Cycle training, which is provided by London boroughs in conjunction with TfL, amongst other cycle training schemes (eg those organised through employers)

Londoners' views and experiences on each of these are examined in turn



# Barclays Cycle Hire

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# Barclays Cycle Hire

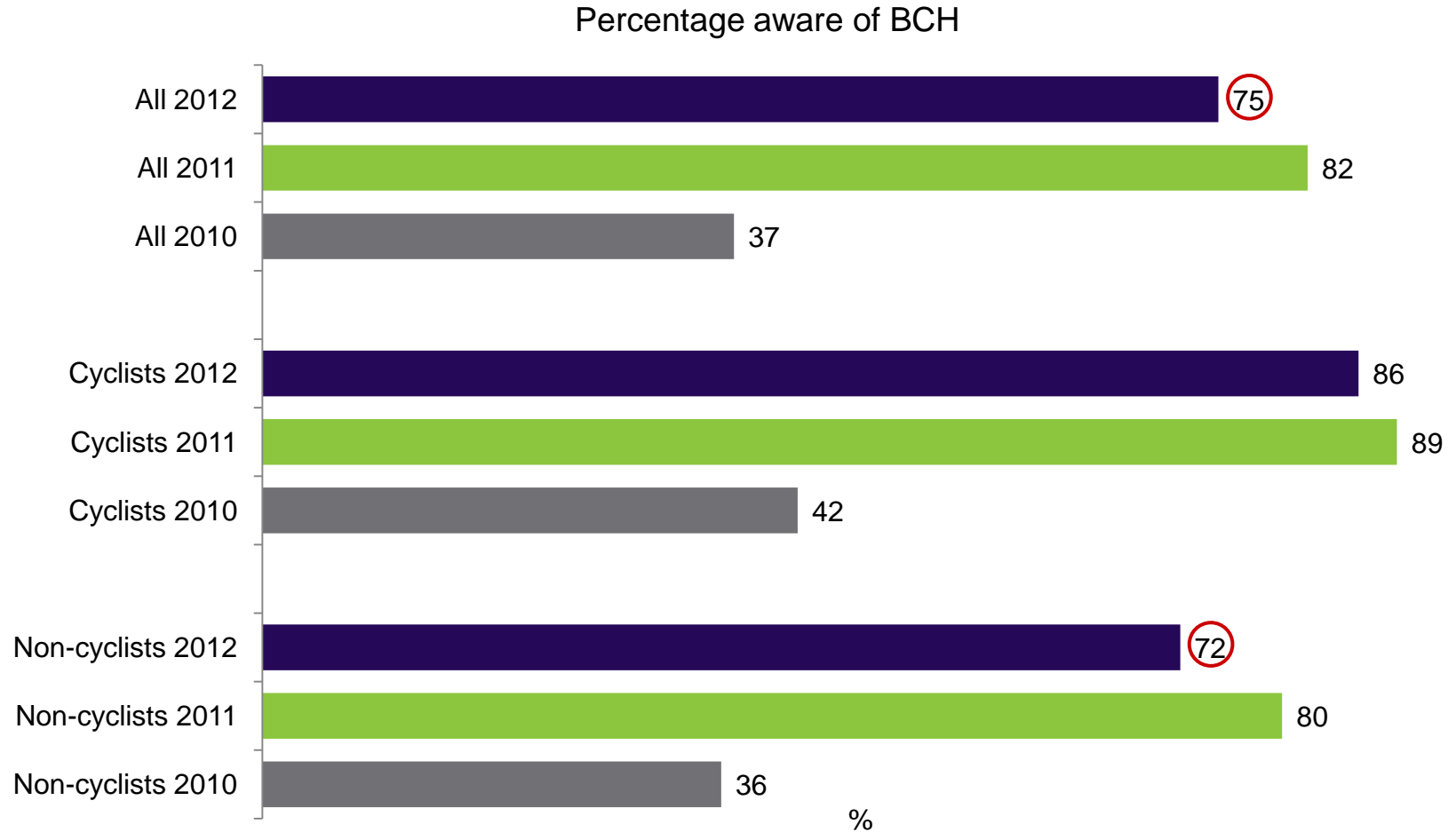
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- Awareness of Barclay Cycle Hire amongst Londoners stands at 75%, slightly down on the highest figure of 82% recorded last year
  - The fall has occurred mainly amongst non-cyclists, while cyclists' awareness has remained high (at 86%)
  
- 7% have used Barclays Cycle Hire, higher than the figure from 2011 (3%), and 29% of non-users say they are likely to use it in the future.
  
- Most current users report that Barclays Cycle Hire has increased the amount they cycle – 26% saying it has increased their cycling a lot, and 36% a little
  
- The most common current and intended use of Barclays Cycle Hire are leisure (75% of current users use Barclays Cycle Hire for this reason, and 79% of intended users think they will)
  
- 57% of users, and 42% of non-users, are aware that the Eastern extension has been implemented.
  - 37% of current non-users say they would use Barclays Cycle Hire if it were available in their area



# Awareness of BCH is at 75% of Londoners; slightly down on 2011, the fall driven by non-cyclists

## Awareness of Barclays Cycle Hire



 Significantly lower than March 2011

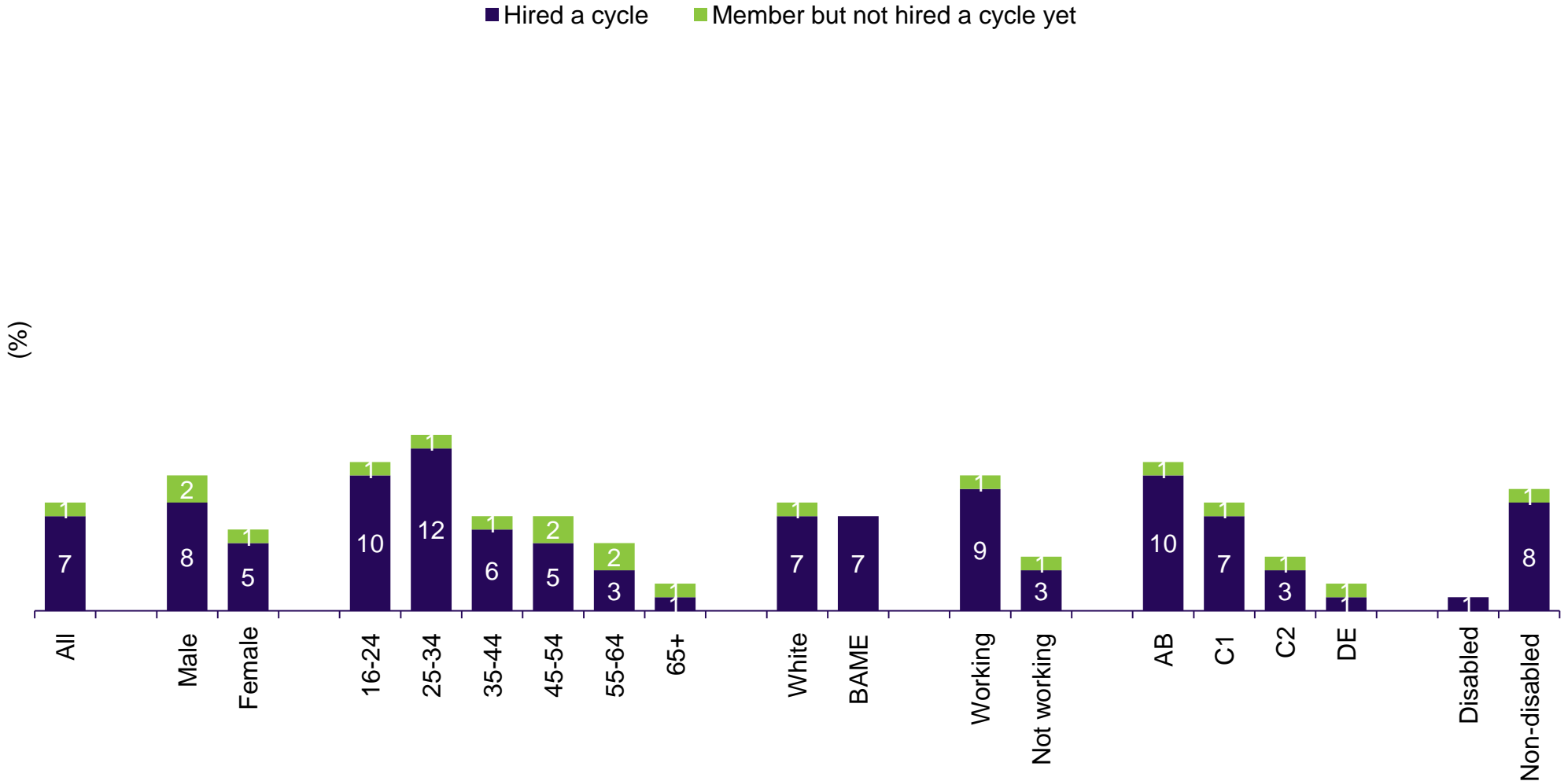
N1: Are you aware our the Barclays Cycle Hire scheme?

Base: All – 2012 (1,326); 2011 (1,066), 2011 (1,007); Cyclists – 2012 (505) 2011 (176), 2010 (156); Non-cyclists – 2012 (821) 2011 (890), 2010 (851)



# 7% of Londoners have hired a BCH bike; more likely to be male, in work, AB socio-economic group and non-disabled

## Use of Barclays Cycle Hire



QN2: Have you used Barclays Cycle Hire?  
Base: all (1,326)

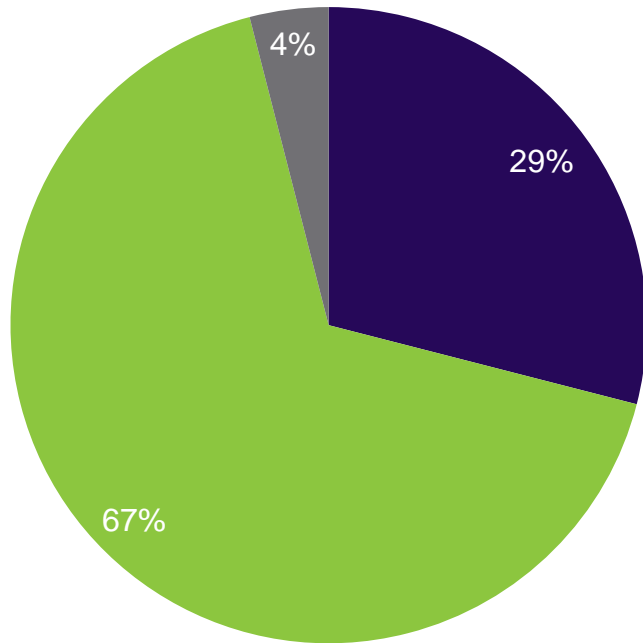


Almost a third of non-users intend to hire a bike in the future; reported use amongst users, and expected use amongst current non-users, is very similar

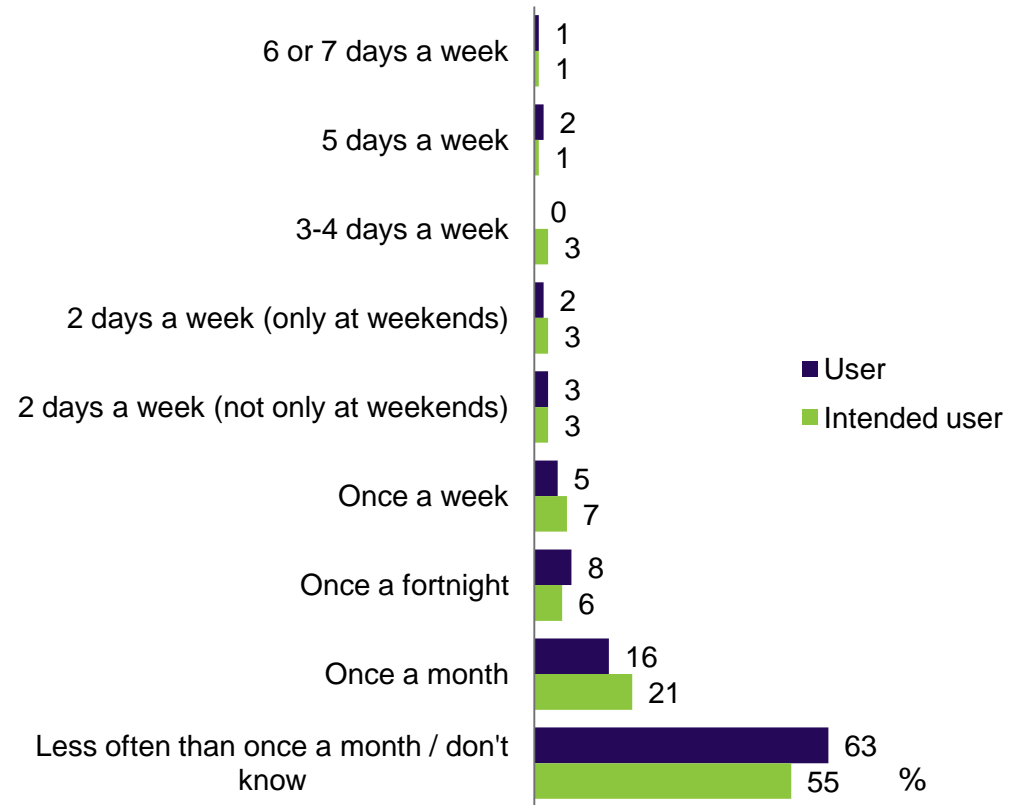
(Intended) frequency of use

Whether intended to use Barclays Cycle Hire in the future

■ Yes    ■ No    ■ Don't know



Frequency of using Barclays Cycle Hire



QN3: Do you intend to use Barclays Cycle Hire in the future? Base: all Barclays Cycle Hire Non-Users (1,220)

QN4: How often do you use Barclays Cycle Hire? Base: Those who used or intend to use Barclays Cycle Hire (106 current, 303 intended)

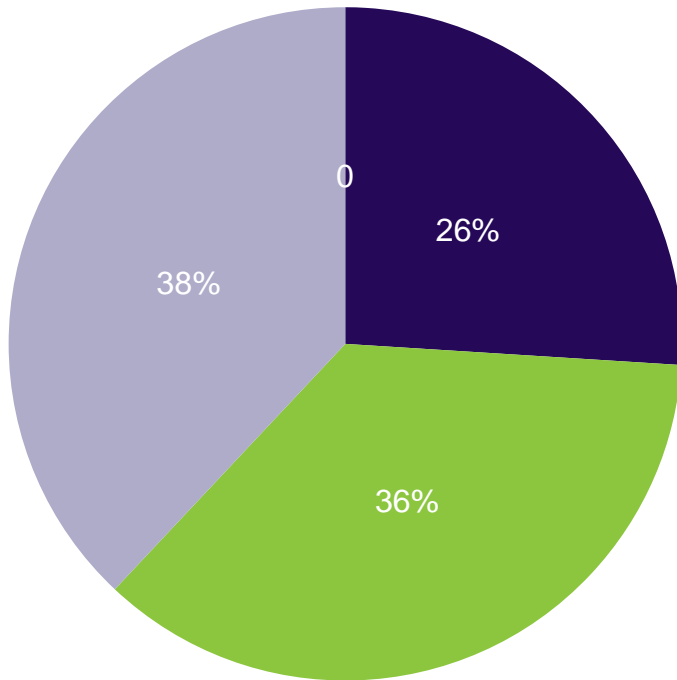


# More than three fifths of users say that BCH increased their cycling; and around half of intended users think it will do so

## Impact of BCH on (intended) cycling

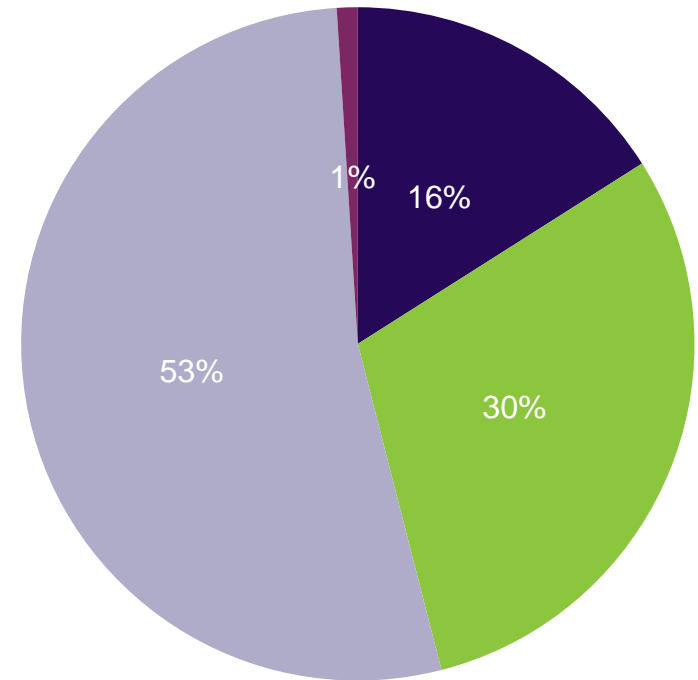
**Current users**

■ Yes, a lot ■ Yes, a little ■ No ■ Don't know



**Intended users**

■ Yes, a lot ■ Yes, a little ■ No ■ Don't know



N5: Has the Barclays Cycle Hire scheme caused you to increase the amount that you (intend to) cycle?

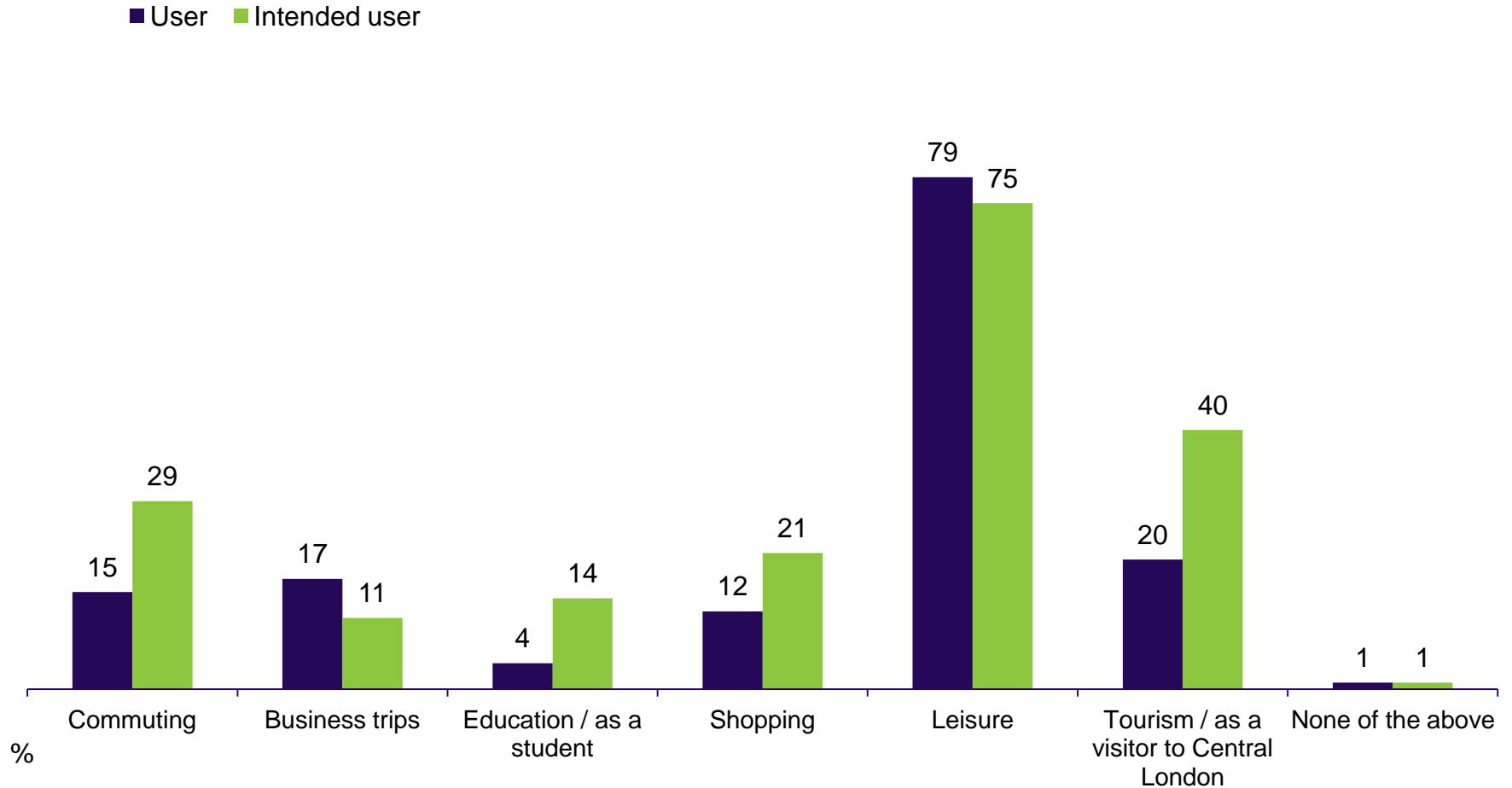
Base: all users (106 current, 303 intended)





# The most common actual or intended use of BCH is for leisure

(Intended) trip use for Barclays Cycle Hire



N6: What kinds of trips do you (intend to) use Barclays Cycle Hire for?

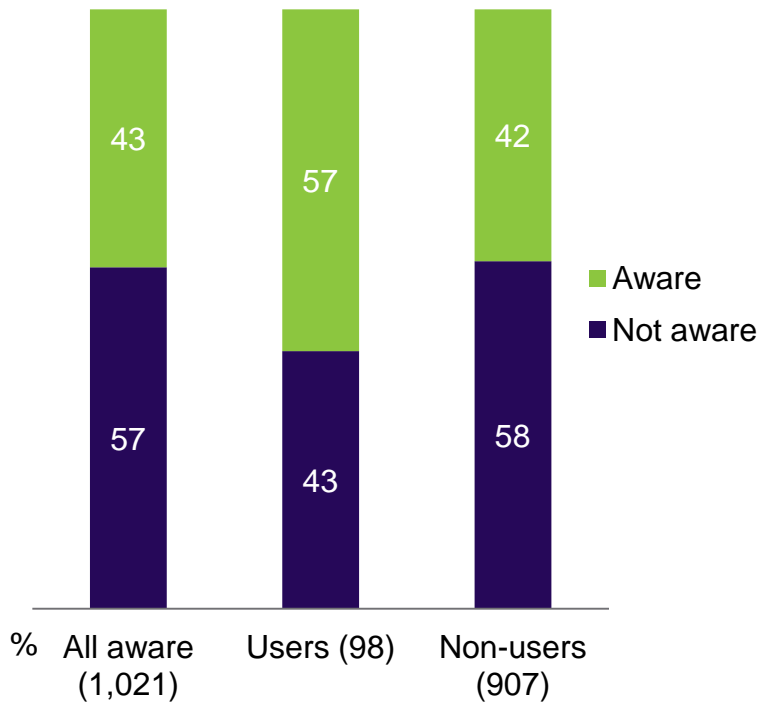
Base: all users (106 current, 303 intended)



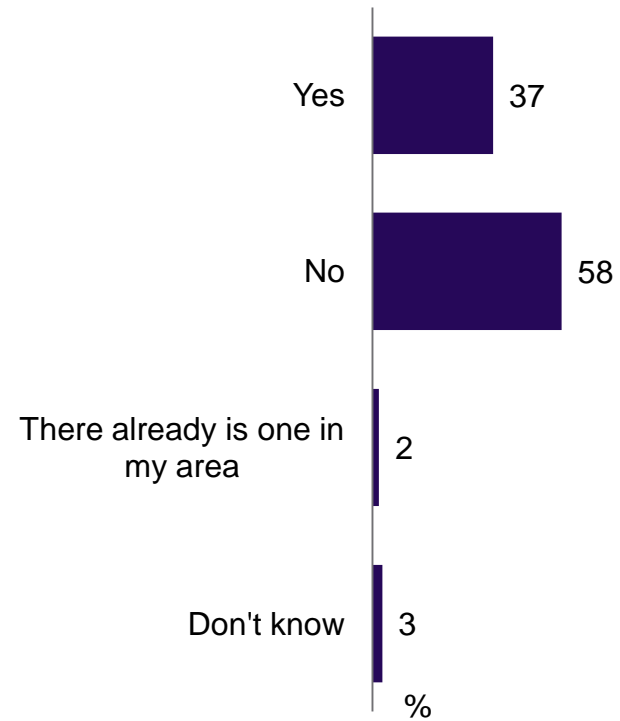
# Most BCH users are aware of the eastern expansion; amongst non-users, 37% say they would use the scheme if it was in their area

## Eastern expansion area and potential use

**Awareness of Eastern expansion area**



**Whether would use Barclays Cycle Hire if in your area**



QN7: Were you aware that the area covered by Barclays Cycle Hire is expanding from Central London to include more of East London? Base: Those aware of Barclays Cycle Hire (1,021)

QN8: If there were a Barclays Cycle Hire in your area, would you use it? Base: all Barclays Cycle Hire Non-Users (1,220)



# Barclays Cycle Superhighways

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# Barclays Cycle Superhighways

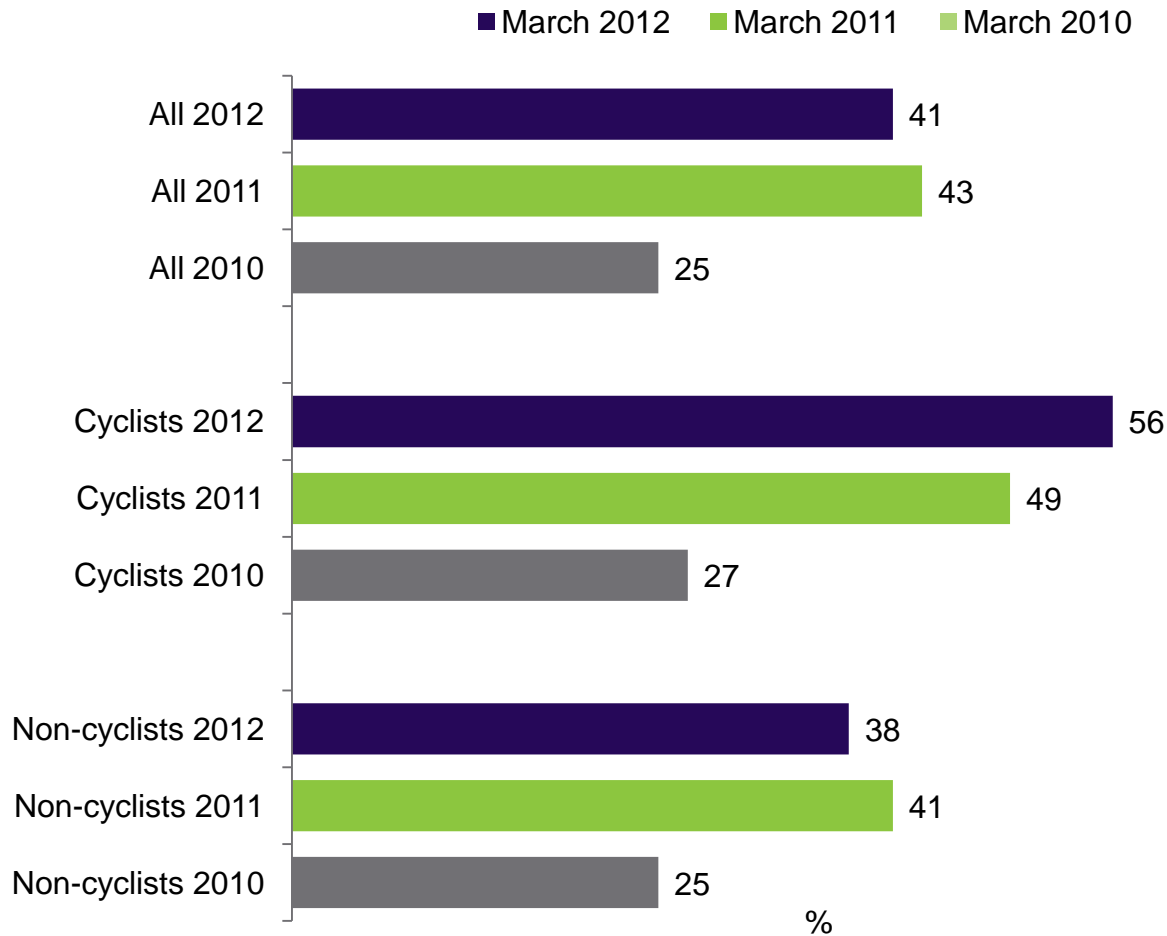
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- 41% of Londoners are aware of Barclays Cycle Superhighways, a slight but not significant fall from the 43% observed in 2011
  - Awareness amongst cyclists has actually risen (again not significantly), from 49% to 56%
- 11% of those who are aware of them have used a Barclays Cycle Superhighway, while 21% of those who have not used on (but are aware of them) intend to use them at some future point
  - Intention to use is highest amongst young people (16-24), of whom 42% intend to use BCSH
- Around 40% of users make use of BCSH at least once a week; those intending to use them report similar but slightly lower expected use levels
- Three quarters (77%) of current users report no impact on their level of cycling as a result of the initiative, however 12% say they are cycling a little more because of BCSH, and 11% say they are cycling a lot more
  - Expected impact amongst intended users is higher – a third believe they will cycle more as a result of BCSH
- The most common actual and expected uses are leisure and commuting
- Of all those aware of BCSH, 28% are aware that there will be eight further routes
  - 47% of non-users who currently do not intend to use BSCH say they would use it if a route were installed in their local area



# There has been a slight but not significant increase in awareness of Barclays Cycle Superhighways this year; 41% of Londoners are aware of them

## Awareness of Barclays Cycle Superhighways



No significant differences compared with 2011

M1: Are you aware of Barclays Cycle Superhighways?

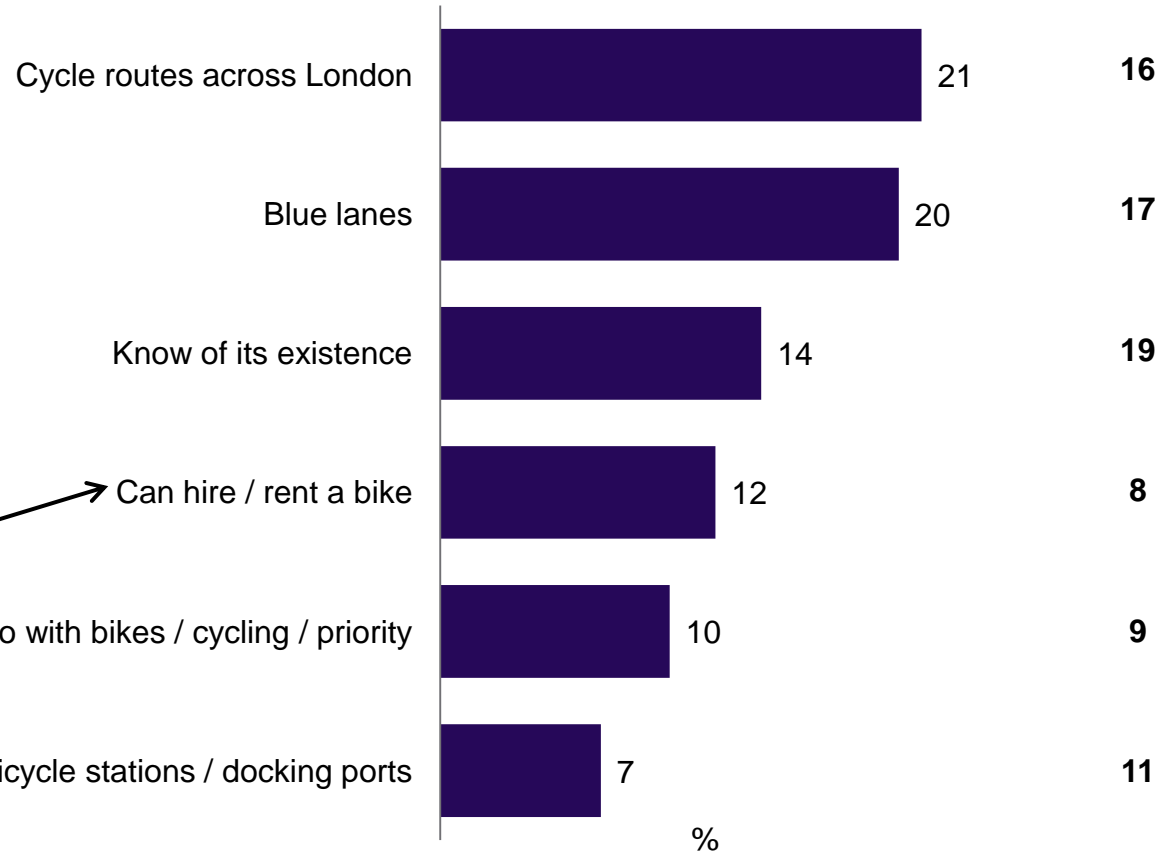
Base: All – 2012 (1,326); 2011 (1,066), 2011 (1,007); Cyclists – 2012 (505) 2011 (176), 2010 (156); Non-cyclists – 2012 (821) 2011 (890), 2010 (851)



Again there is some evidence of false recall for Barclays Cycle Superhighways, though incorrect understanding has declined slightly since October 2010

## Understanding of Barclays Cycle Superhighways

2011  
(Base: 440)



Still some evidence of false recall

 Significantly lower than March 2011

M2: What do you know about the Barclays Cycle Superhighways?

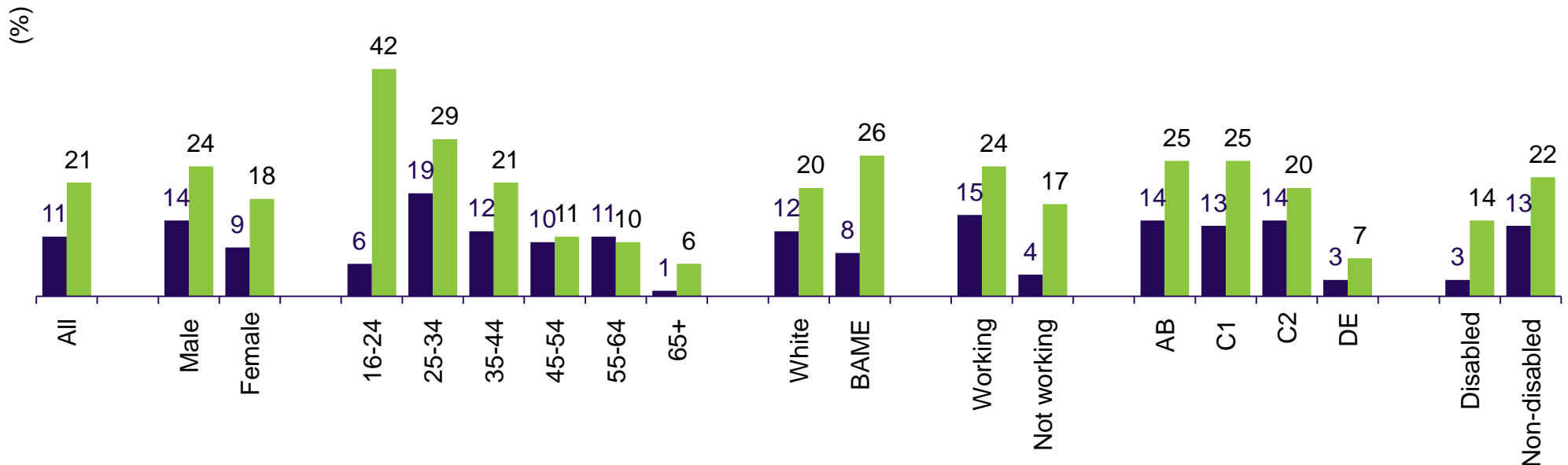
Base: those aware of Barclays Cycle Superhighways? (590)



Of those who aware of BCSH, 11% have used them; amongst aware non-users, a fifth intend to use them (rising to 42% for 16-24 year olds)

## Use of Barclays Cycle Superhighways

■ All aware who have used BCSH    ■ All aware but not used but intend to



M4: Have you used the Barclays Cycle Superhighways?

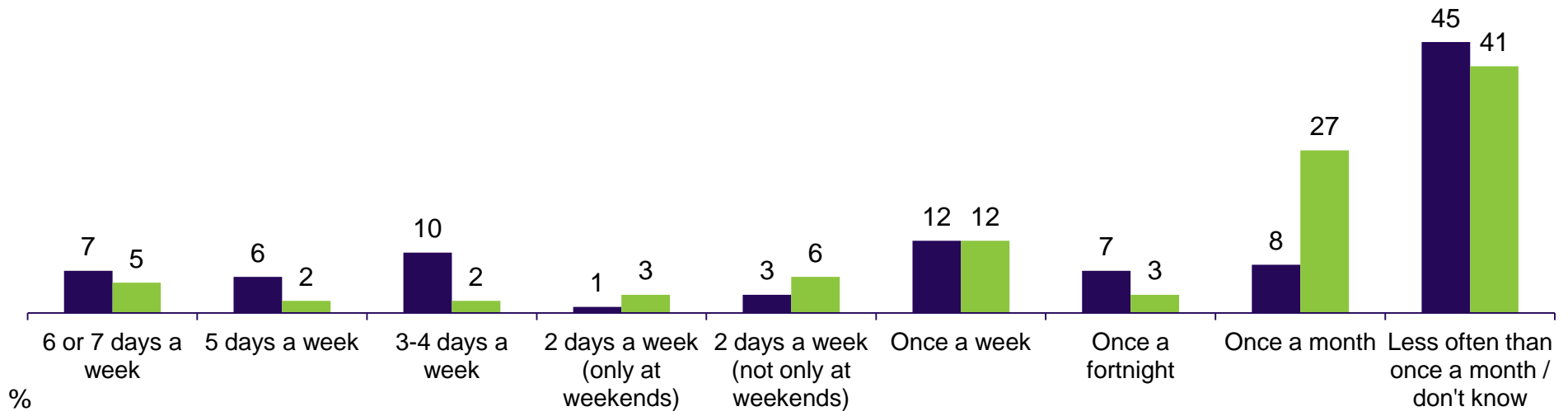
Base: all aware (590); all aware but not used (482)



# Reported actual use is similar to – but slightly higher than – intended use of BCSH

(Intended) frequency of use for Barclays Cycle Superhighways

■ User ■ Intended user



M5: How often do you (intend to) use Barclays Cycle Superhighways?

Base: all users (108 current, 102 intended)



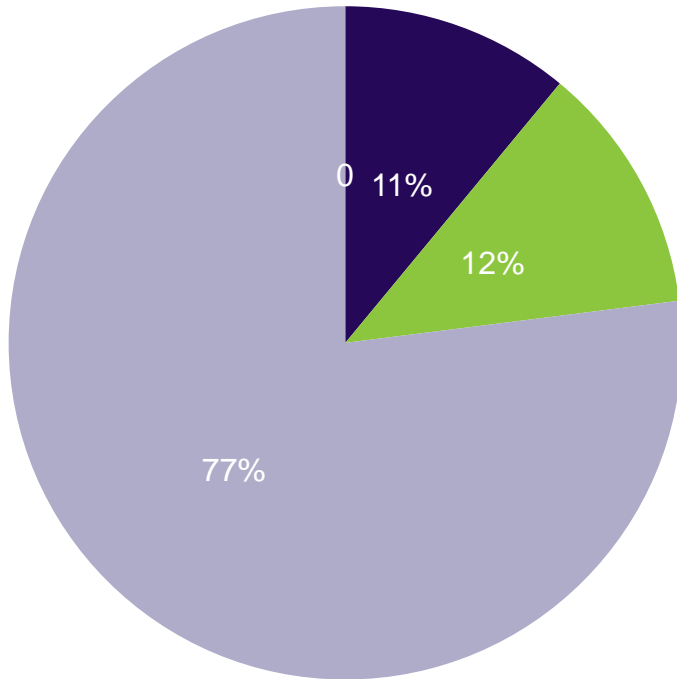


# 23% of users say that BCSHs have increased their cycling; amongst intended users a third say their level of cycling would increase

## Impact of BCSH on (intended) cycling

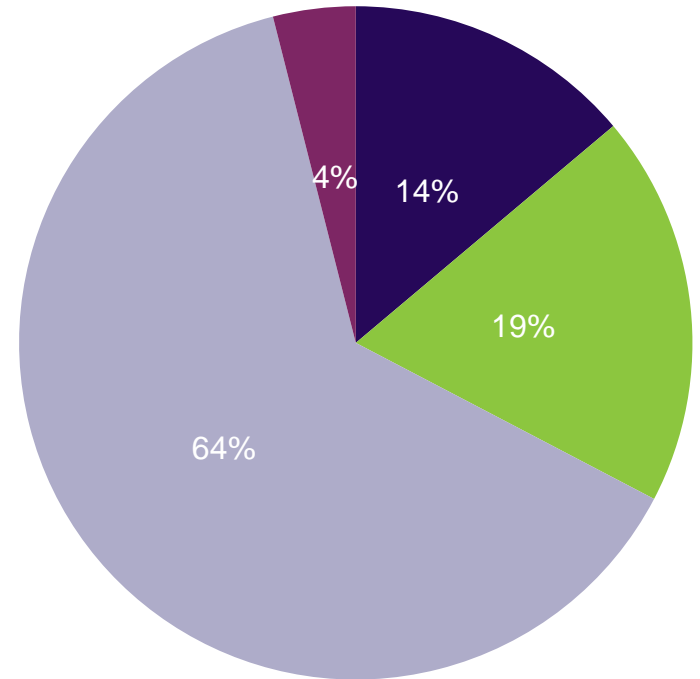
**Current users**

■ Yes, a lot ■ Yes, a little ■ No ■ Don't know



**Intended users**

■ Yes, a lot ■ Yes, a little ■ No ■ Don't know

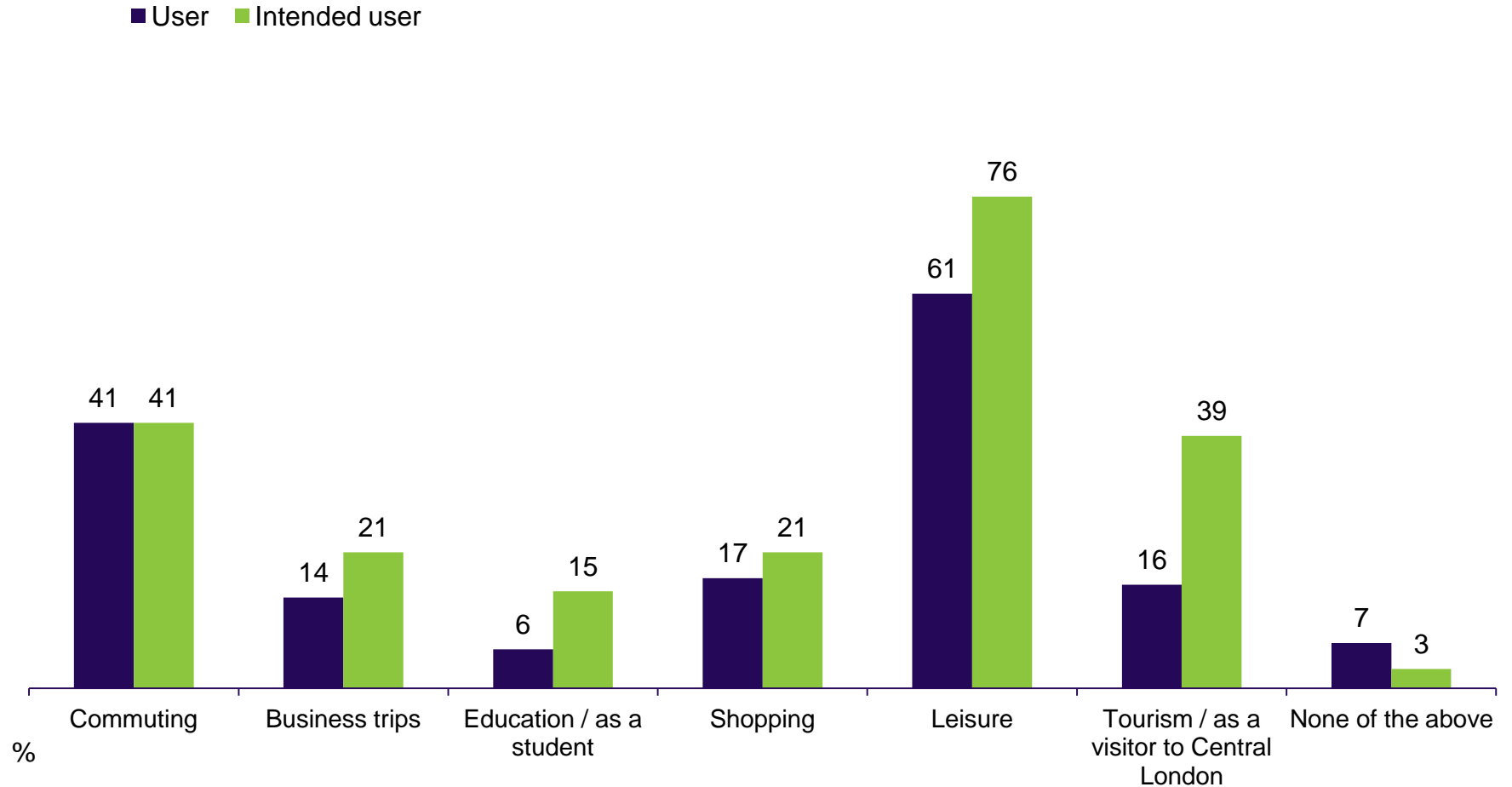


M6: Have the Barclays Cycle Superhighways caused you to increase the amount that you (intend to) cycle?  
Base: all users (108 current, 102 intended)



# Leisure and commuting are the most common uses, and intended uses

(Intended) trip use for Barclays Cycle Superhighways



M7: What kinds of trips do you (intend to) use Barclays Cycle Superhighways for?

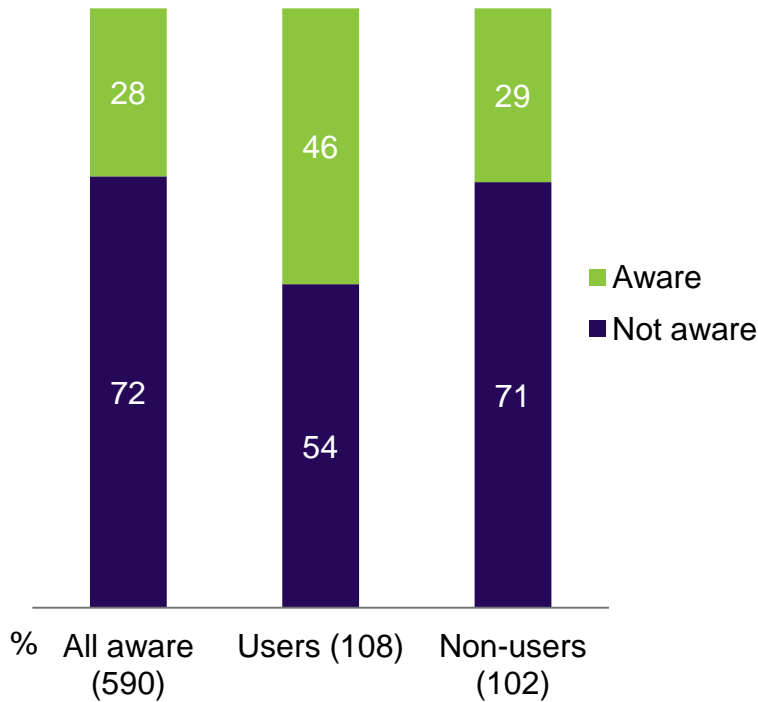
Base: all excluding those with false recall (107 current, 84 intended)



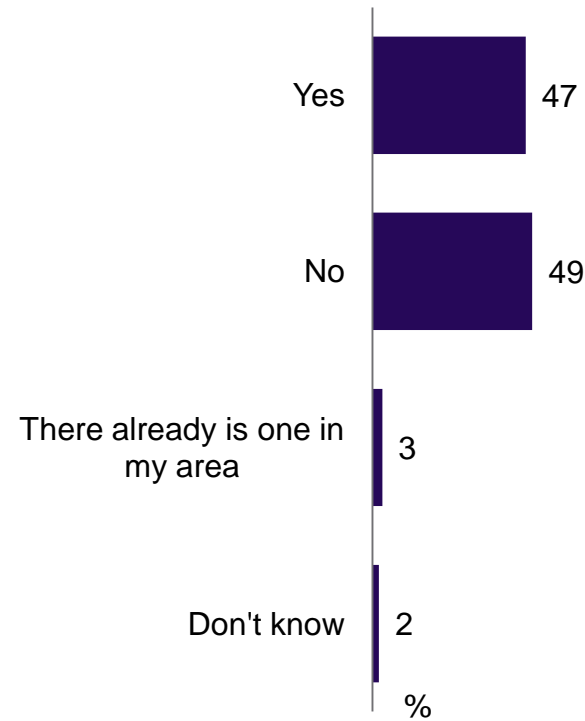
Amongst users, almost half are aware of the full extent of the BCSH programme; although three quarters of Londoners are not

Awareness that more BCSHs will open, and potential use

**Awareness that there will be 12, of which four have been opened**



**Whether would use BCSH if installed in your local area**



M8: Were you aware that only four out of twelve Barclays Cycle Superhighways have currently been built and that the scheme will be expanded over the coming years? Base: Those aware of Barclays Cycle Hire (505)

M9: If the Barclays Cycle Superhighways are installed near to where you live, would that encourage you to use them? Base: all non-users who do not intend to use BCSH (482)

# → Cycling events

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# Cycling events

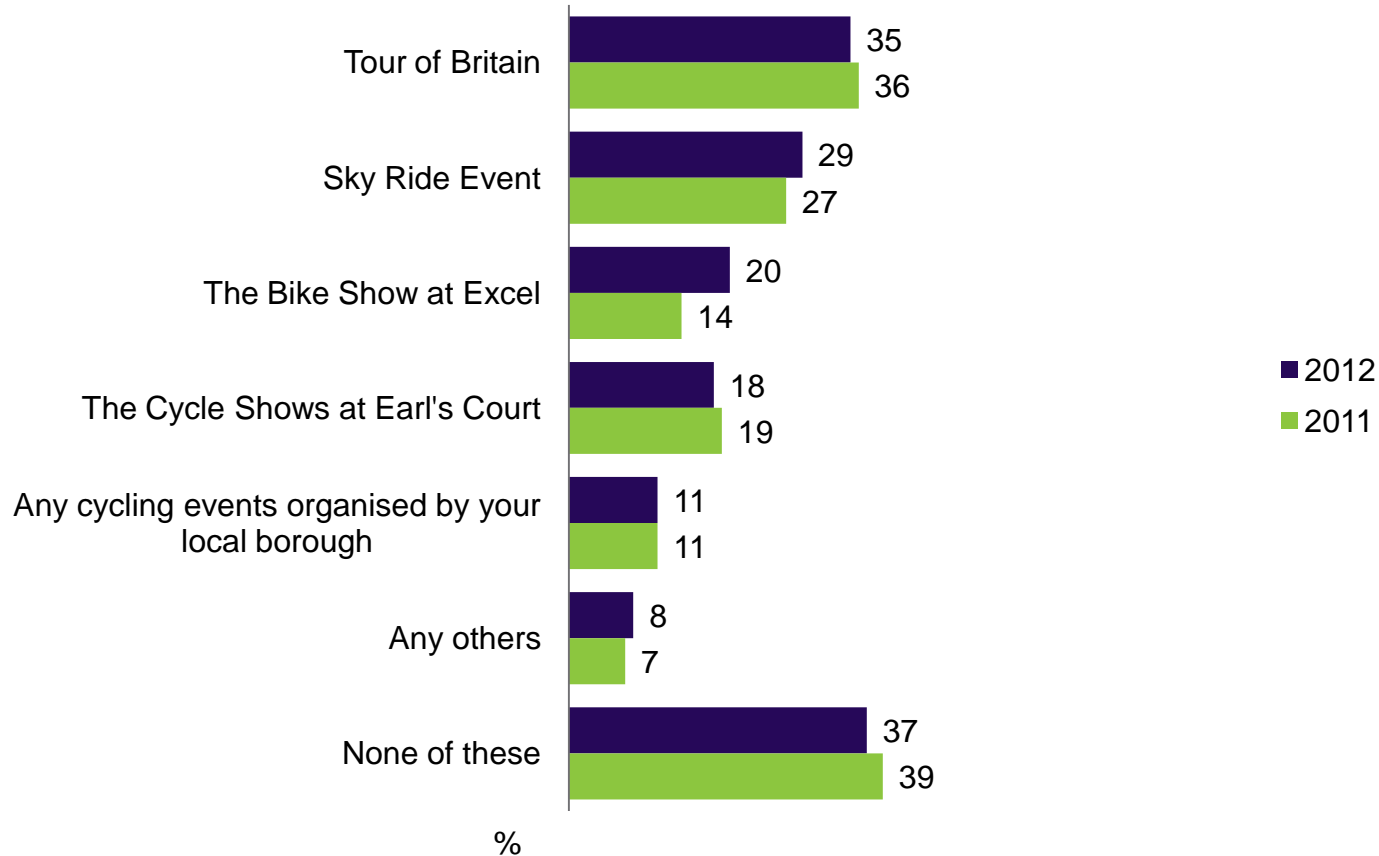
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- Tour of Britain and the Sky Ride Event remain the most commonly recognised cycling events with 35% and 29% aware of them respectively. 37% have not heard of any of the events mentioned
- Higher proportions claim they will attend various cycling events in the future than the proportions who report attending in the last 12 months. 10% claim they will attend the Sky Ride Event in the next year whilst 3% attended it last year. Expected attendance for Tour of Britain stands at 9% (compared to 4% who attended in 2011)



# Tour of Britain and Sky Ride are the best recognised cycling events; little change since last year

## Awareness of cycling events



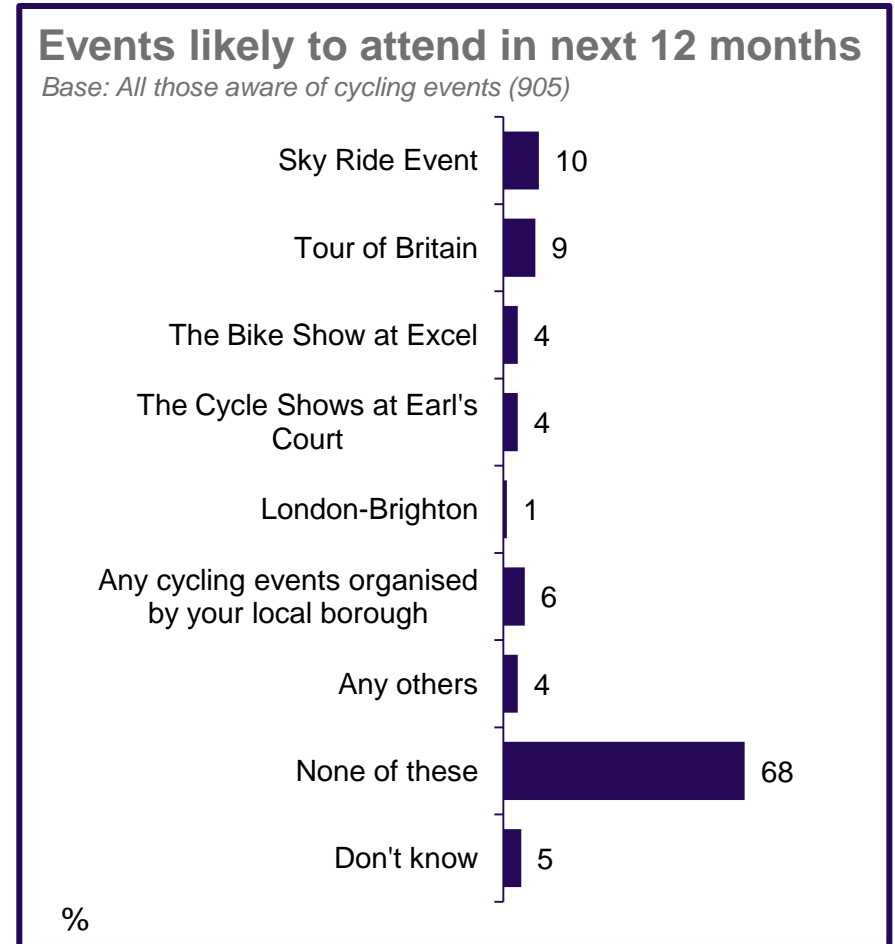
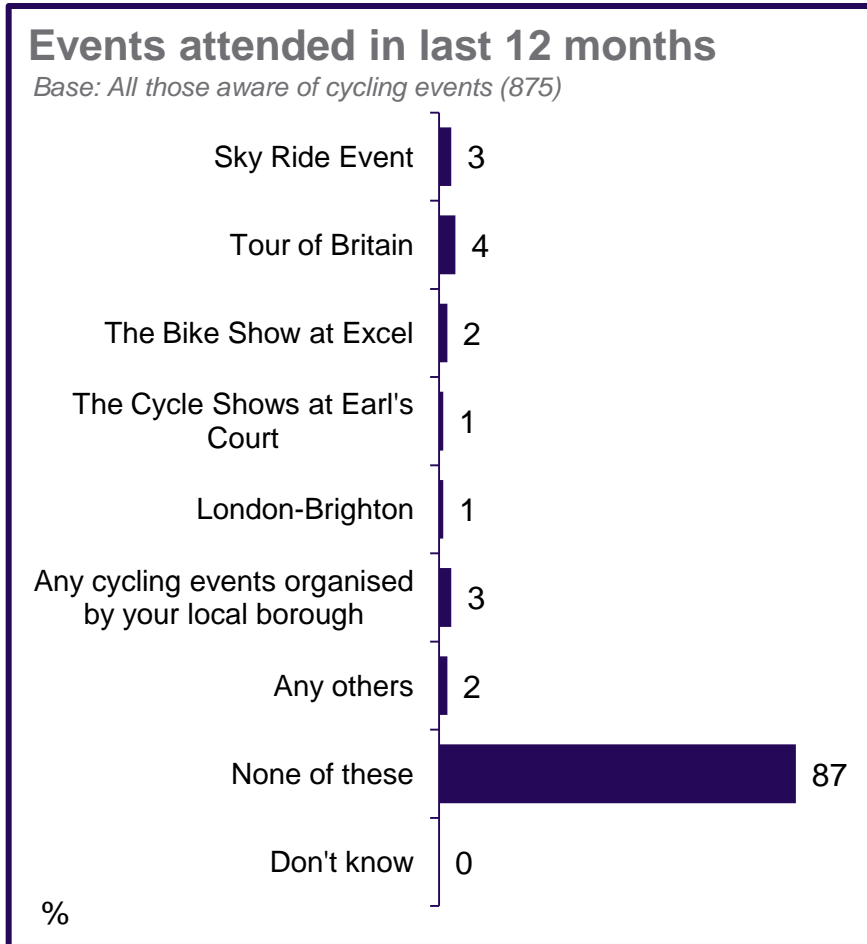
P1: Which of these cycling events in London over the last 12 months have you heard of?

Base: All (1,326), 2012 (1,066)



# As seen in 2011, reported future attendance is higher than actual past attendance for most cycling events

## Reported attendance of cycling events



P2: Which of the following events have you attended in London in the last 12 months?

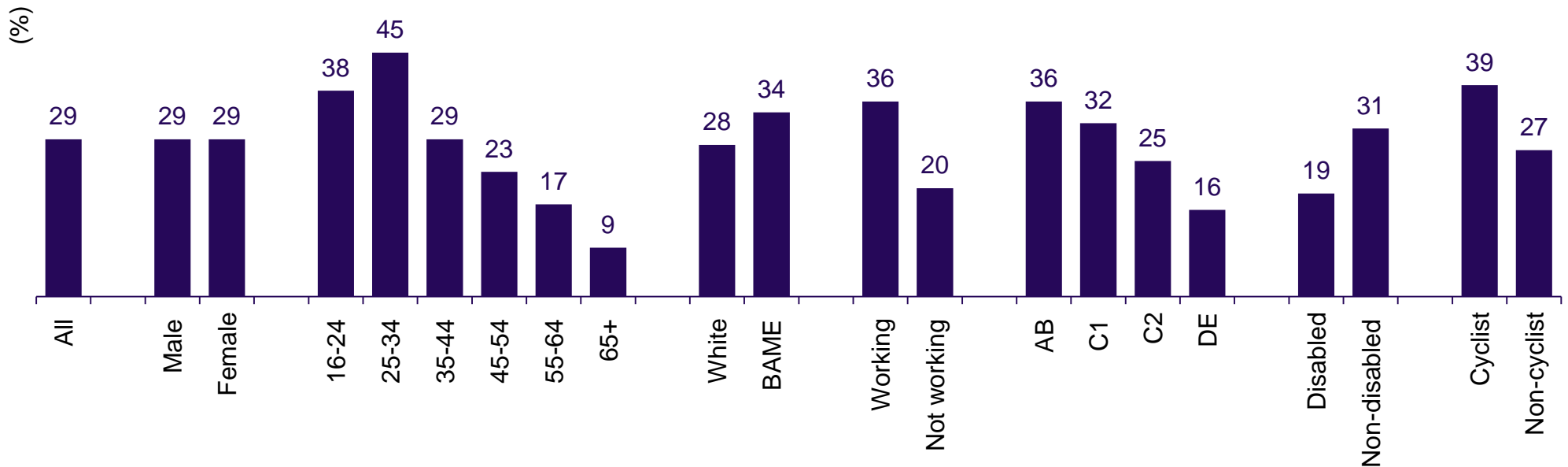
P3: Which of these cycling events are you likely to attend in London in the next 12 months?

Base: All those aware of cycling events



# 29% of Londoners say they will attend an Olympic / Paralympic venue during the Games; cyclists are more likely than non-cyclists to say so

## Anticipated attendance of the Olympic / Paralympic Games



Q2012: Are you planning to visit any of the Olympic or Paralympic venues during the games?  
Base: all (1,326)



# → Cycle training

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# Cycle training

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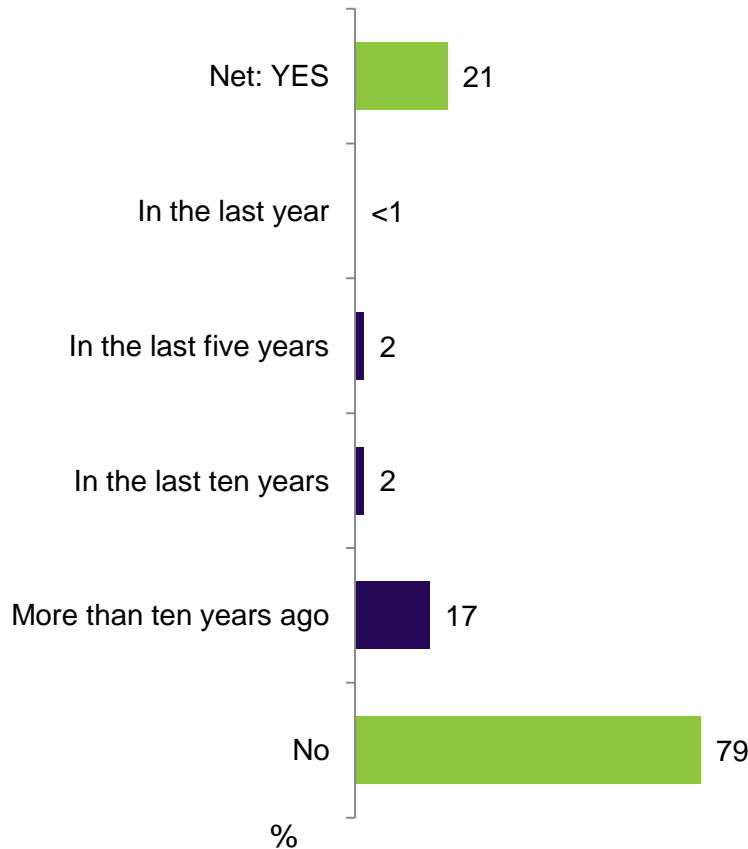
- 21% of Londoners have attended cycle training at some point in their lives, with the majority of these (61%) having done the old national Cycling Proficiency Test
  - For 17% of those who had taken cycle training, it was provided in a group training session with other adults
  
- For most, the cycle training took place some time ago, with only 4% of Londoners saying they had taken part in cycle training in the last ten years
  
- 25% of Londoners are aware that local Councils offer cycle training to adults
  - However that figure falls to only 16% of BAME Londoners, and 17% of those aged 16-24



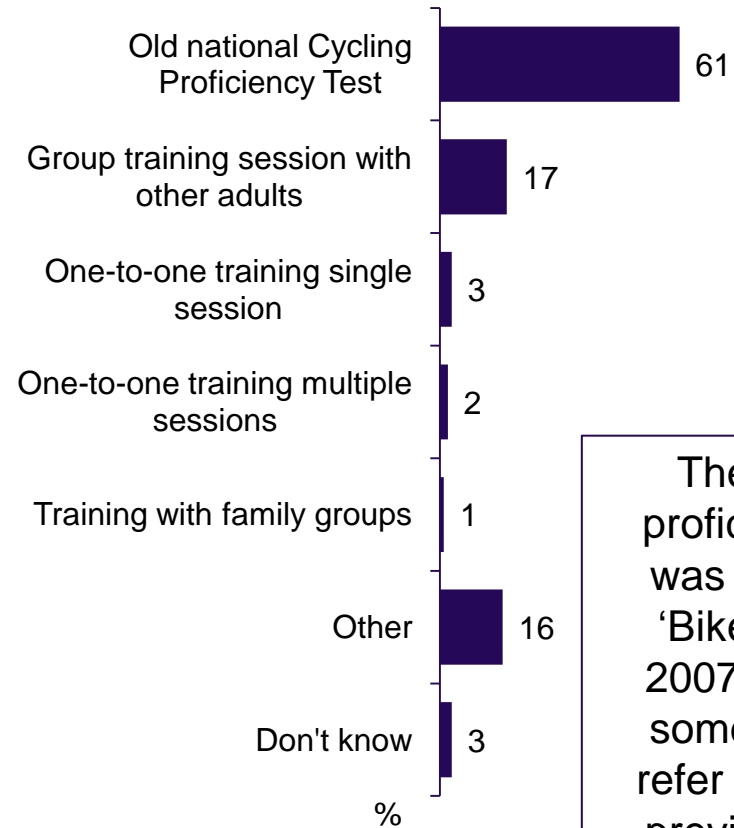
# A fifth of Londoners have taken cycle training, the most common form being the national proficiency test, often a long time ago

## Experience of cycle training

### Cycle training attendance



### Type of cycle training attended



The cycling proficiency test was re-named 'Bikeability' in 2007; however some may still refer to it by the previous name

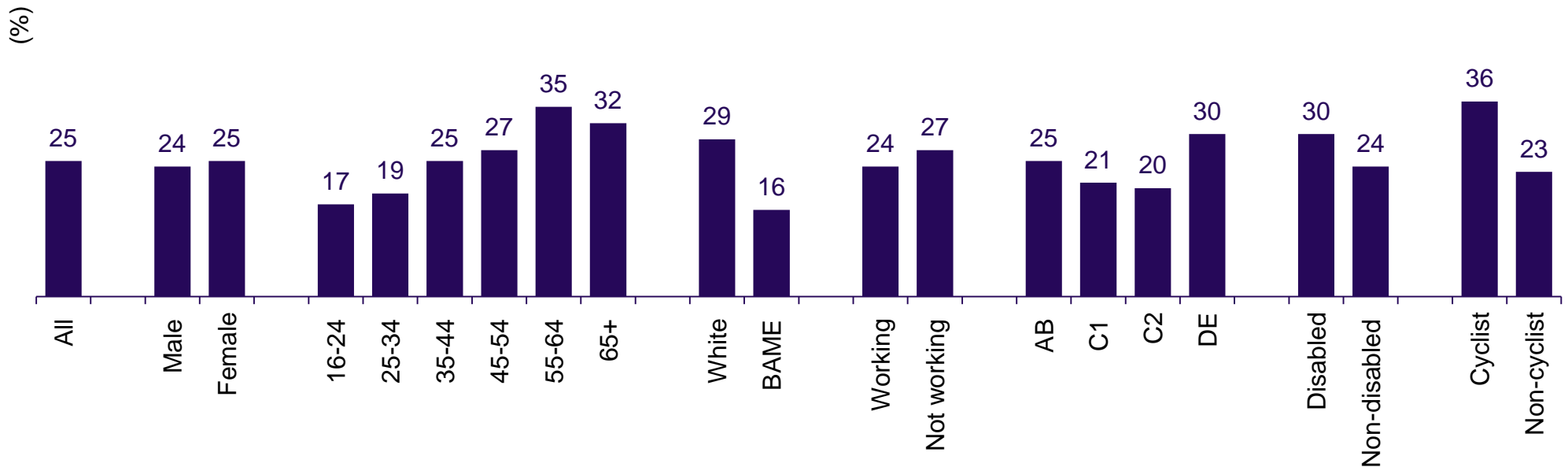
Q1: Have you ever attended any cycle training? Base: all (1,326)

Q2: What sort of cycle training did you have? Base: All those who have attended cycle training (304)



# A quarter of Londoners know that most local Councils provide adult cycle training; awareness is highest amongst older Londoners and cyclists

## Awareness that local Councils offer cycle training for adults



Q4b: Did you know that most local Councils offer cycle training for adults with a qualified instructor?

Base: all (1,326)

# → Investment in cycling

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# Investment in cycling

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## Investment in cycling

- Half of Londoners think that there is about the right level of investment in cycling (things like training, facilities and infrastructure investment)
- However the remainder are almost three times more likely to say there is too little, rather than too much, being done to help people cycle in London
- Men, older people, inner Londoners and cyclists are most likely to think that there is too little being done in this area

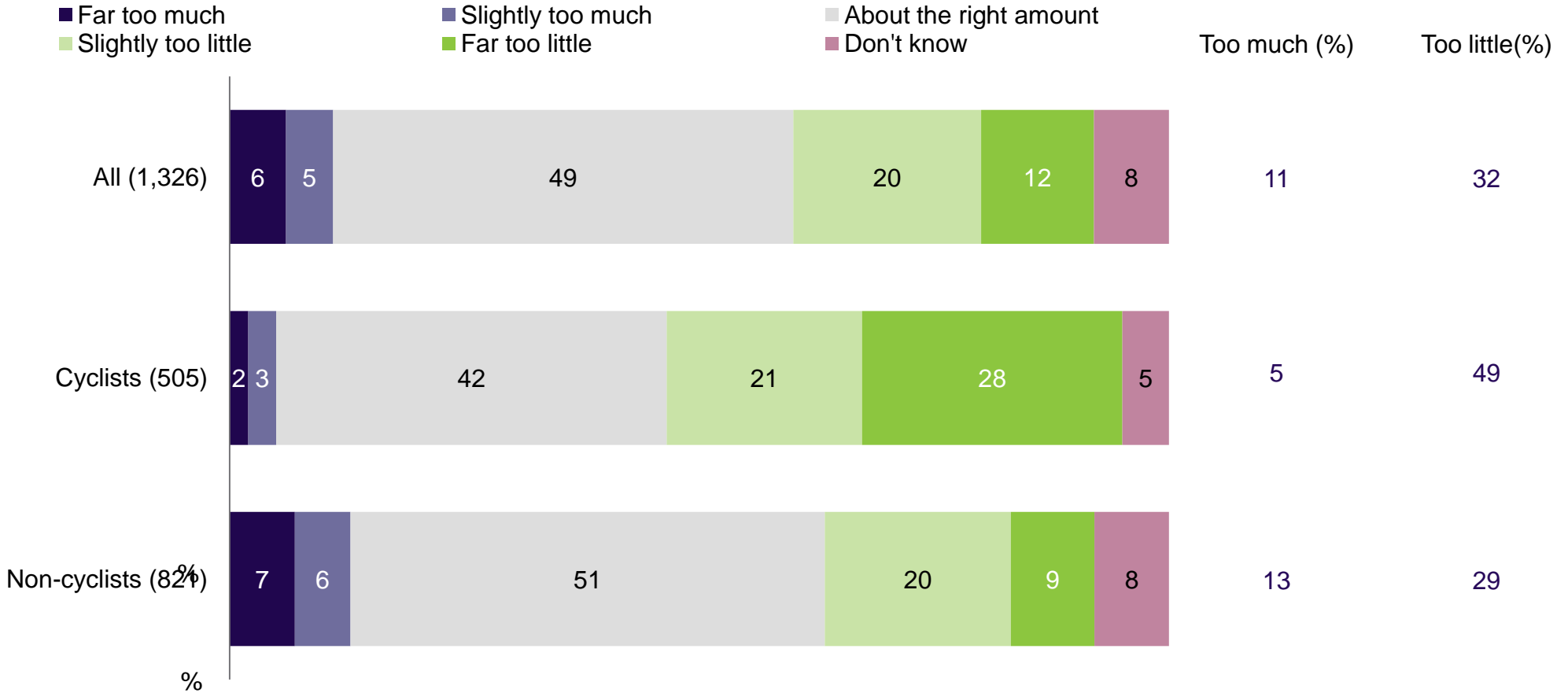
## Greenways

- 48% of Londoners are aware of Greenways (rising to 55% for cyclists)
- 19% of Londoners (and 31% of cyclists) have used a Greenway



# Half of Londoners think there is the right amount of investment in cycling (training, facilities, infrastructure)

## Investment levels in cycling



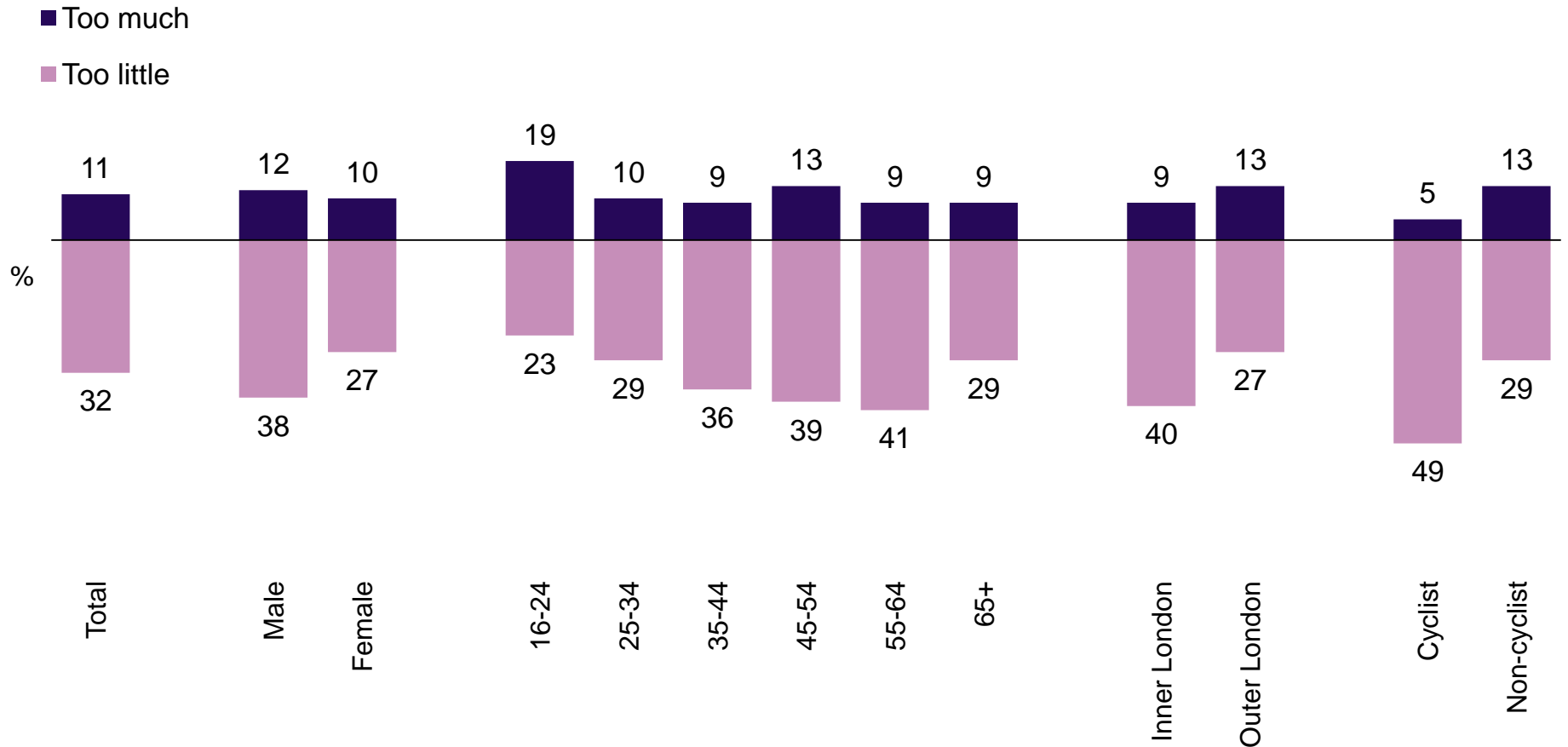
Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount?

Base: all (1,326)



# Londoners are three times more likely to think that there is too little investment in cycling rather than too much

## Perception of investment levels in cycling



Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount?

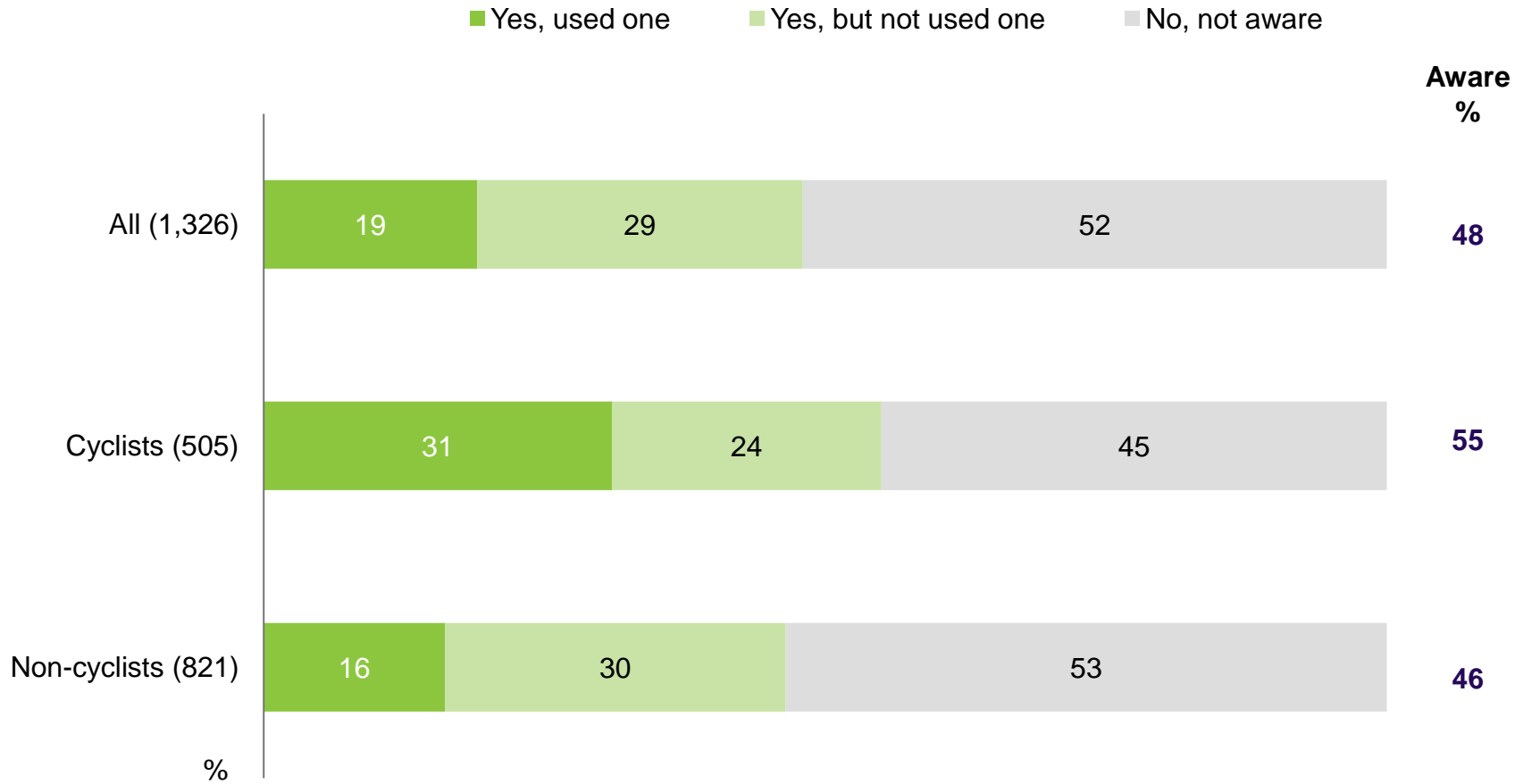
Base: All





# Half of Londoners are aware of London's Greenways, rising to 55% of cyclists; a fifth have used them (31% of cyclists)

## Awareness of London's Greenways



W14: Have you ever heard of London's Greenways, a network of walking and cycling routes around London?

Base: All (1,326)



# Cycle crime

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# Perceptions of cycle crime

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- Cyclists feel most at risk from crime when riding at night and in central London (just 28% feel safe from crime or anti-social behaviour); conversely they feel safest in the local area during the day (82% feel safe)
  - Compared with 2011 fewer cyclists feel safe both during day and after dark when thinking about cycling in London, while the local area figures have remained steady
- Almost half of cyclists (47%) change the route they are using when travelling after dark
- There are high perceptions of cycle crime: 64% of cyclists think there is a lot of cycle crime in London (particularly regular cyclists), and 41% say that concerns about bike theft put them off cycling more (rising to 47% for occasional cyclists)
- Most cyclists have heard or read about cycle thefts or collision in the media – 14% recall media coverage of cycle theft, and 50% recall media stories about cycle collisions



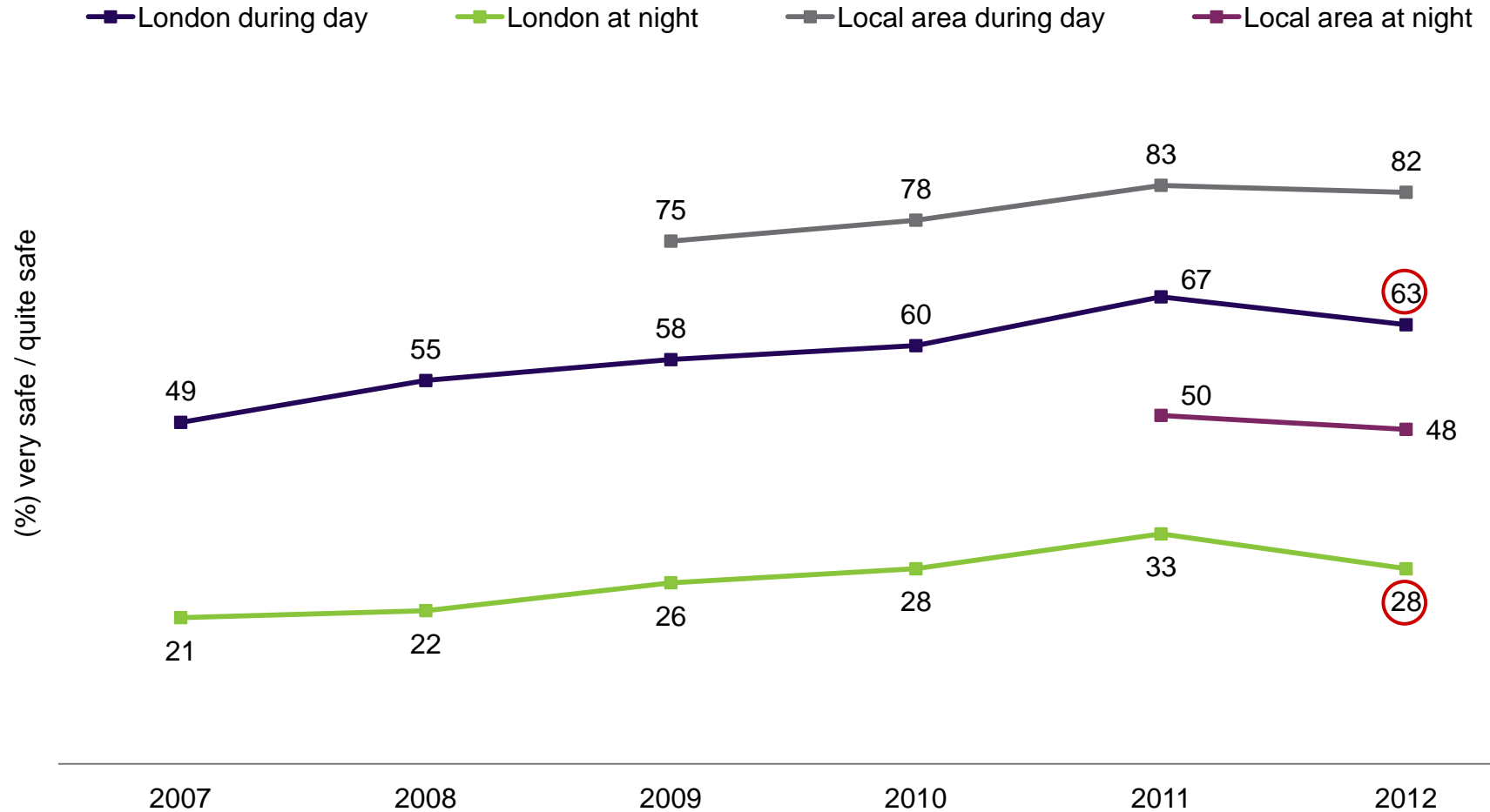
# Experiences of cycle crime

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- 13% of Londoners have experienced the theft of a bike or part of bike in the last couple of years
  - For cyclists the figure is even higher – 24% have had a bicycle stolen, and 9% a part of bike
- For most of those to have experienced theft it has happened only once (for 61% of those affected)
  - However around 10% of those who have had cycling equipment stolen have experienced it at least three times
  - In almost nine out of ten cases, the stolen items were not recovered, but two thirds replaced the item (or plan to)
- 47% reported all incidents to the police, while 43% did not report any
  - The most common reasons for not reporting are that it is considered a 'waste of time' (by 29%), that the bike was not worth much (19%) or that nothing would be done (14%)
- 49% of those who have experience cycle theft still cycle as much as they did before, but 22% cycle less and 29% have stopped cycling
- For most, the experience had little other effect on their cycling, but some have become more security conscious or store their bike in a different location now



# After a general upward trend over recent years, in 2012 there was a decline in perceptions of cycling safety, particularly in central London



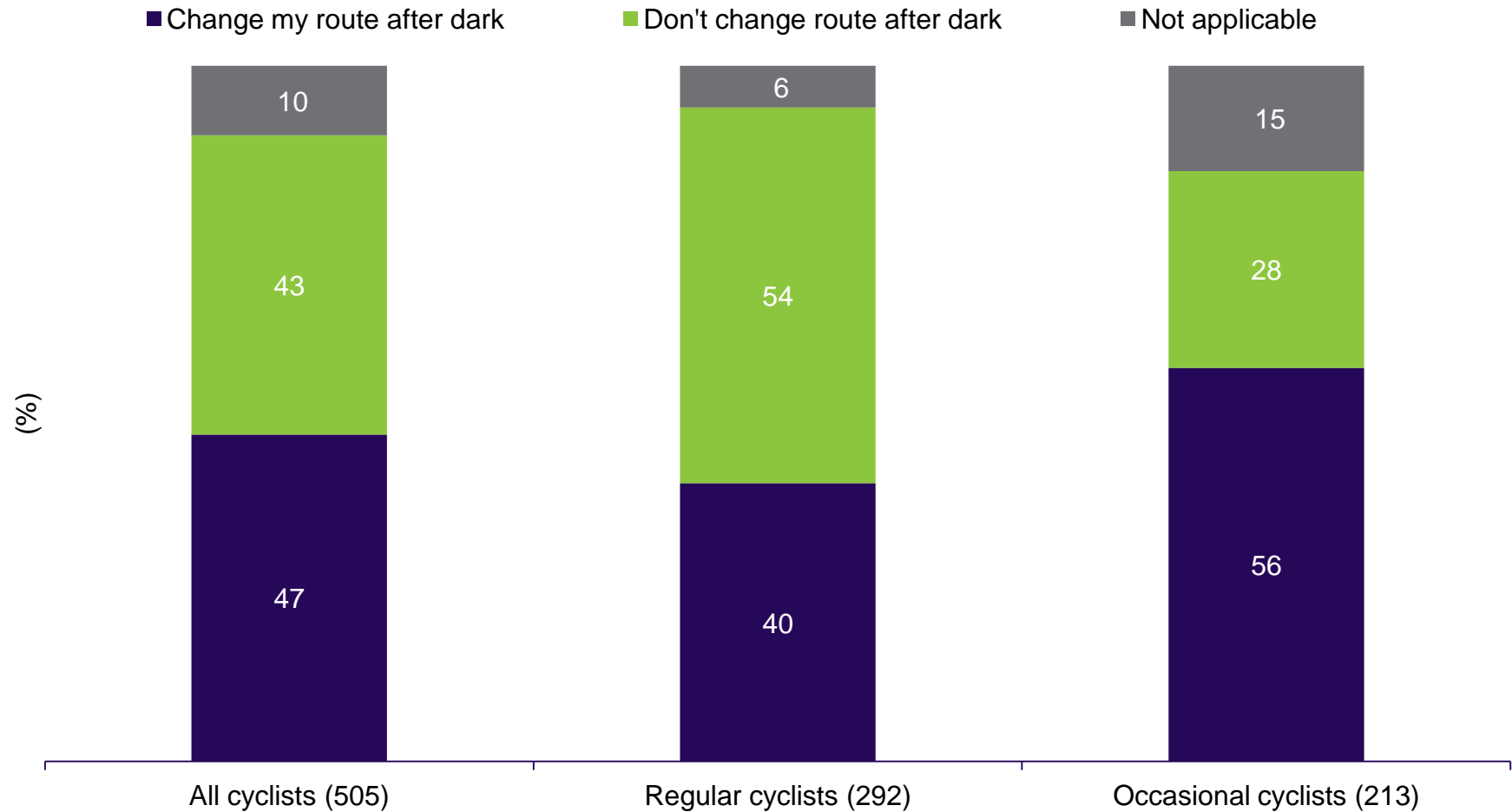
 Significantly lower than 2011

K1 – K4. Thinking about cycling in {London/local area} {during the day/at night}, how safe from crime or antisocial behaviour do you feel? Base: All – 2012 (1,326), 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)



# Around half of cyclists change their route when travelling in the dark – rising to 56% for occasional cyclists

## Change in cycling route after dark



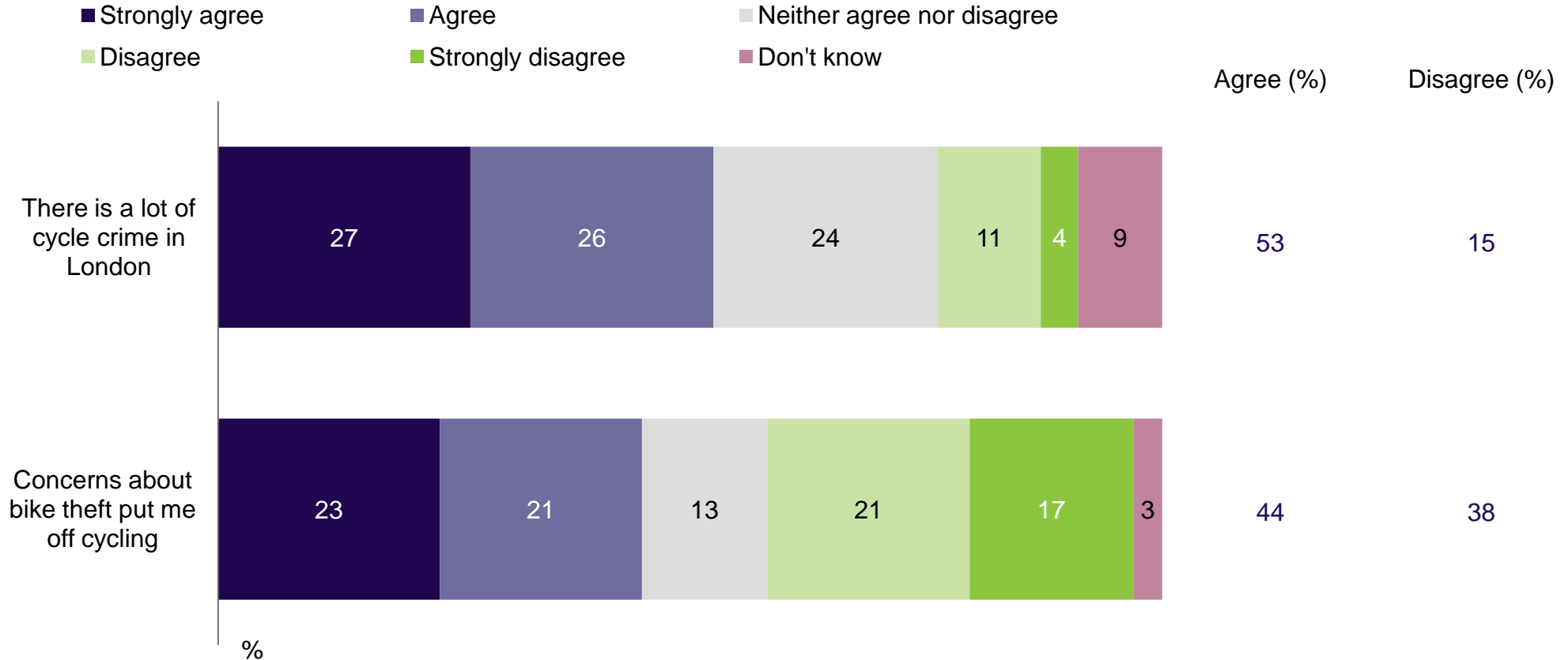
K5: Would you or do you change your cycling route depending on whether you are travelling in the dark?

Base: All cyclists (505)



# More than half of Londoners agree that there is a lot of cycle crime in London, and almost half are put off cycling because of it

## Attitudes towards cycle crime in London



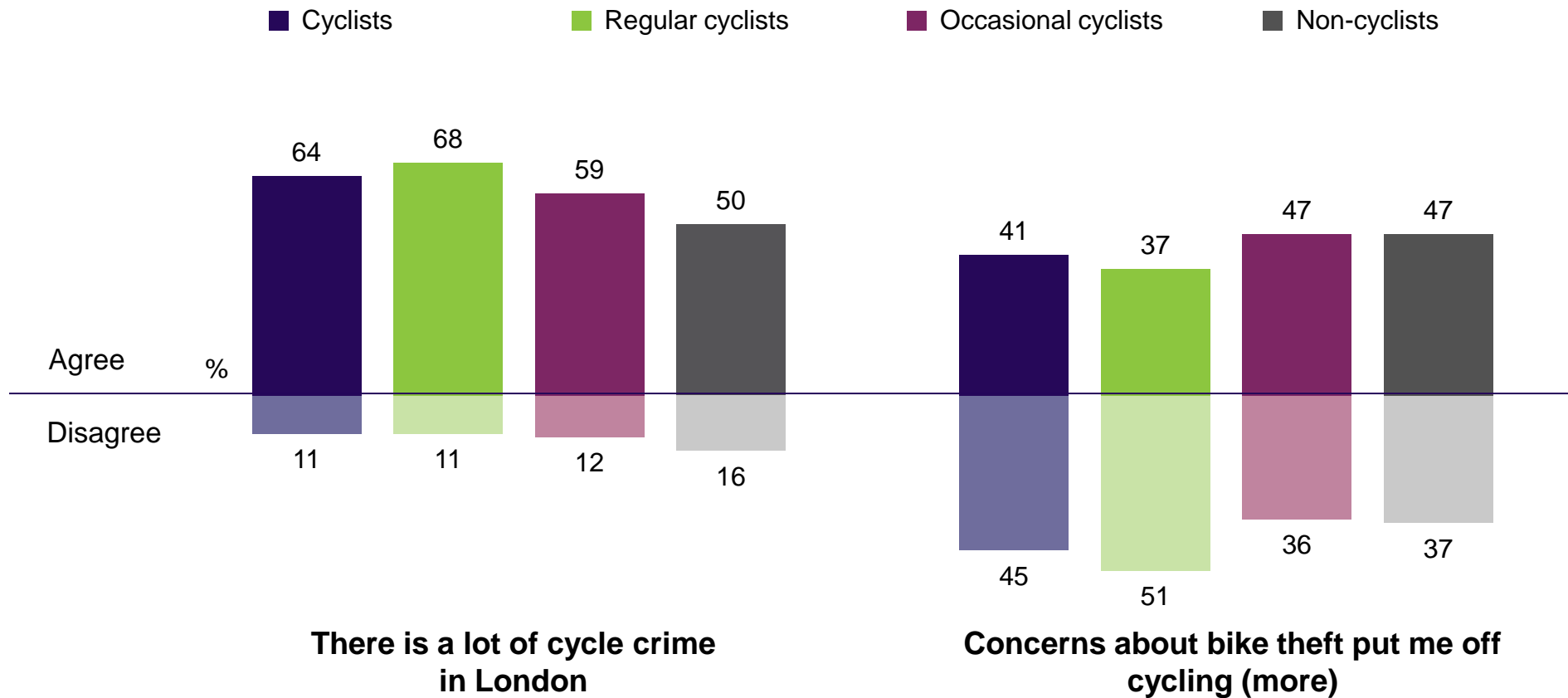
L1: To what extent do you agree or disagree with the following statements about cycle crime in London?

Base: all (1,326)



# Regular cyclists are most likely to agree that there is a lot of cycle crime in London, but least likely to be put off by it

## Attitudes towards cycle crime in London



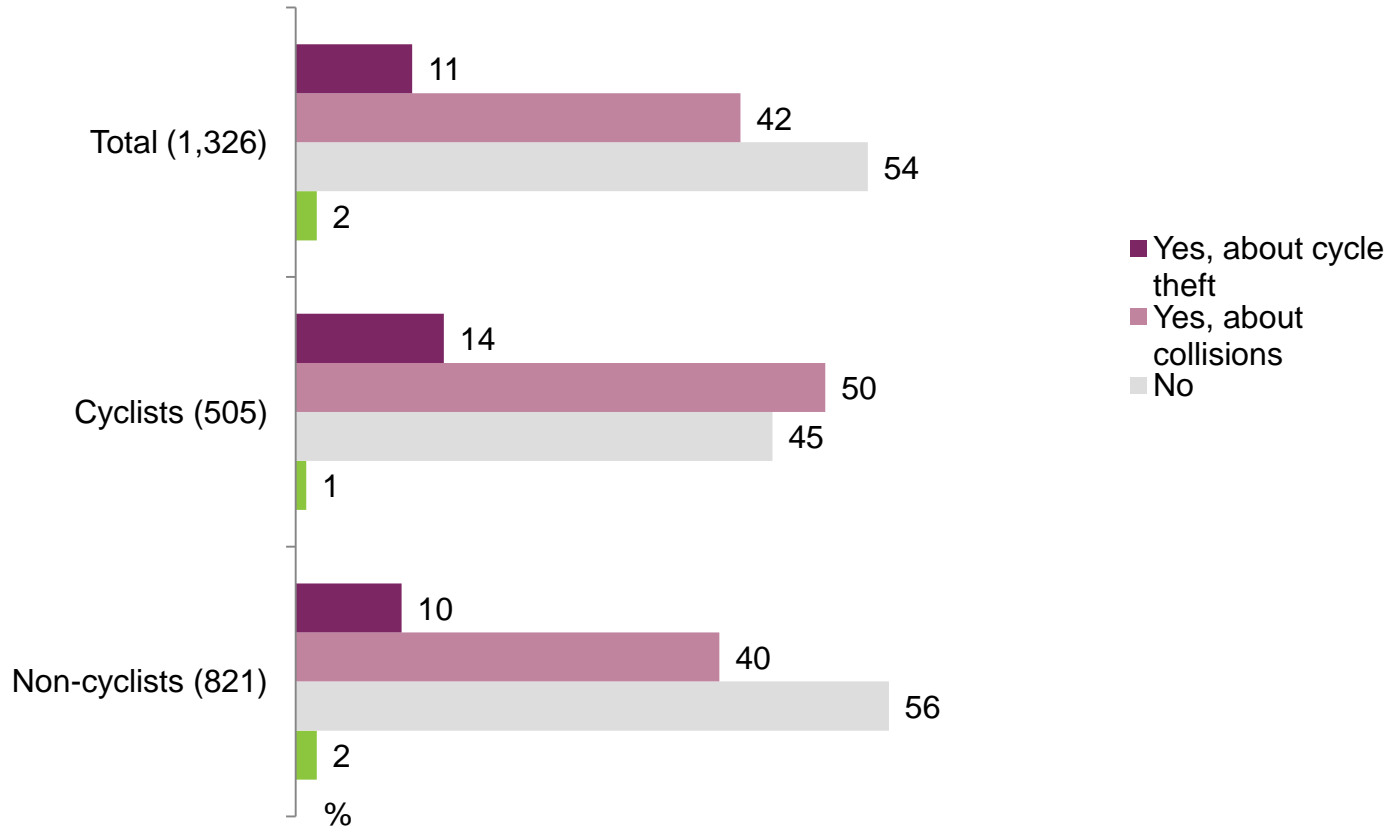
QL1: To what extent do you agree or disagree with the following statements about cycle crime in London? Base: all (1,326)





# Around half of Londoners have seen some coverage of cycle theft or collisions recently

## Recalled media coverage of cycle theft and collisions



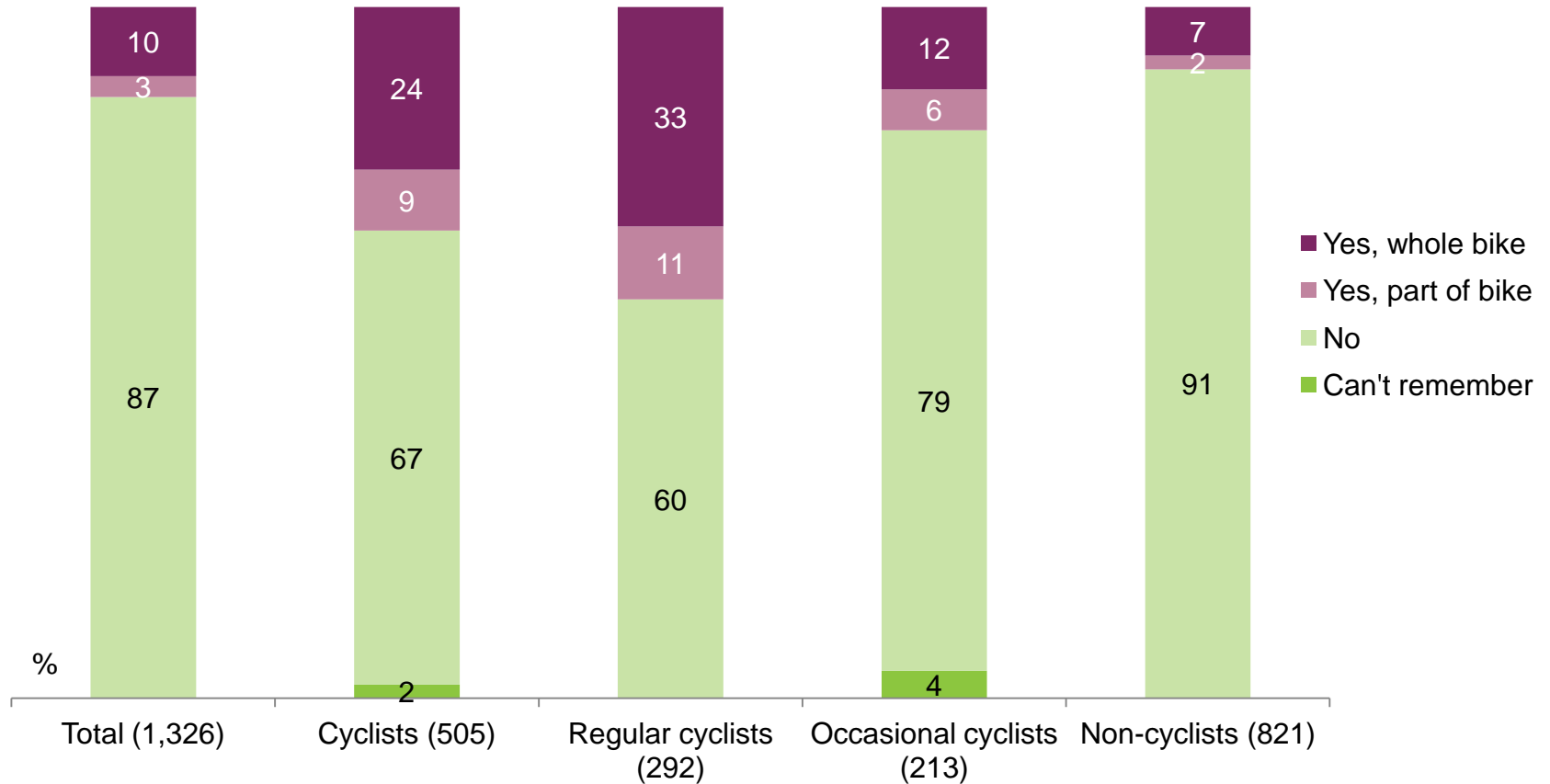
L4: Have you seen any newspaper or television coverage about cycle theft or collisions involving cyclists recently?

Base: all (1,326)



# Regular cyclists report having experienced high levels of cycle theft over the past few years

## Reported incidence of cycle theft



L5: In the last couple of years, have you ever had a bike - or part of a bike - stolen?

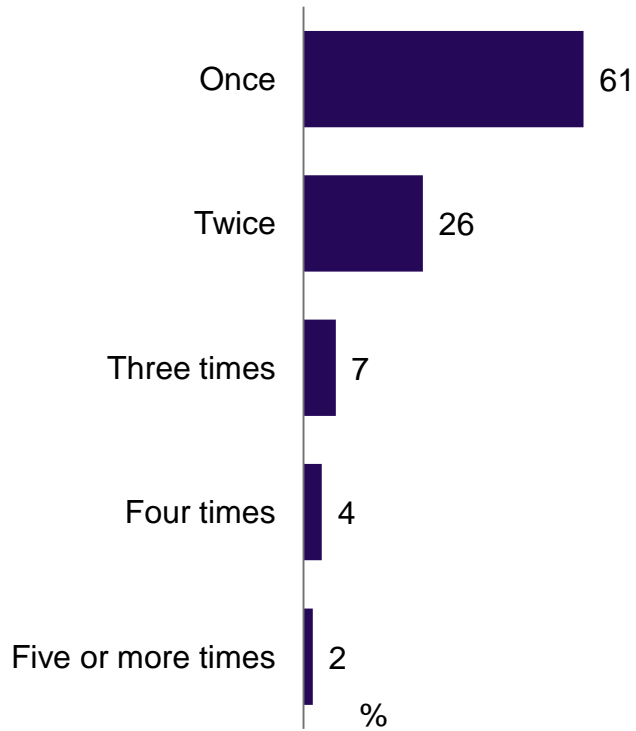
Base: all (1,326)



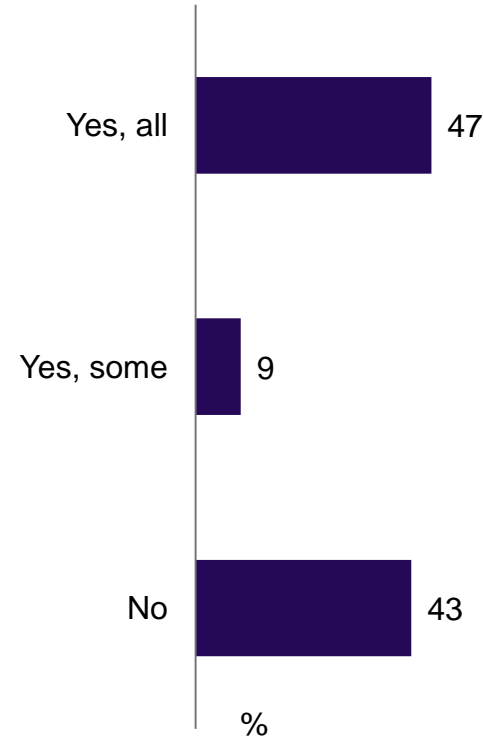
# Two fifths of those to have experienced cycled theft have done so more than once; around half the cases of bike theft are reported to police

## Number of cycle thefts experienced, and whether reported to police

**Number of times had your bike (or part of bike) stolen**



**Whether reported to the police**



**Waste of time: 29%**  
**Bike was not worth much: 19%**  
**Nothing would be done: 14%**  
**I did not care: 12%**  
**Could not be bothered: 11%**  
**It was my fault: 5**  
**Only small part of bike: 4%**  
**Others: 10%**

L6: How many times has this happened to you (in the last couple of years)? Base: all who have had (part of) bike stolen (200)

L7: Did you report any of these incidents/the incident to the police? Base: all who have had (part of) bike stolen (200)

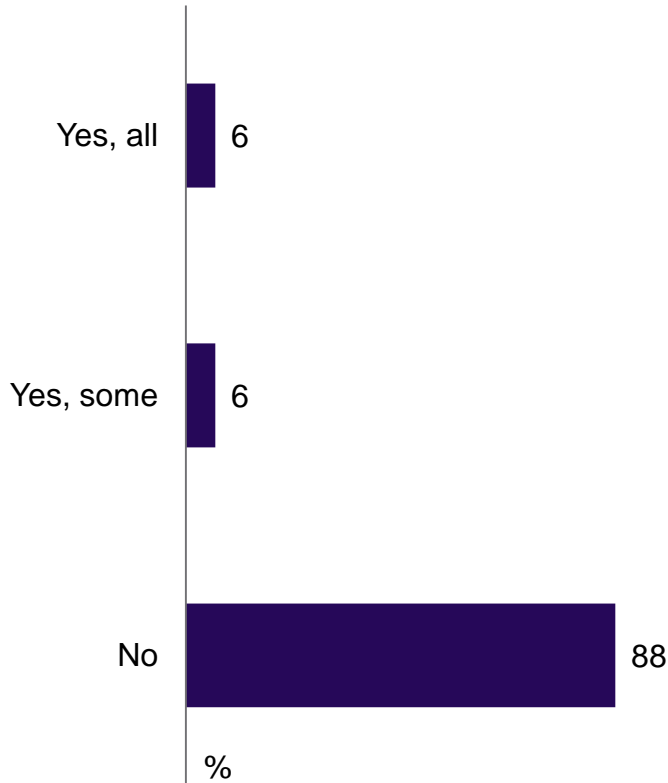
L9: Why didn't you report (all of) the incident(s) to the police? Base: all not reporting it to the police (106)



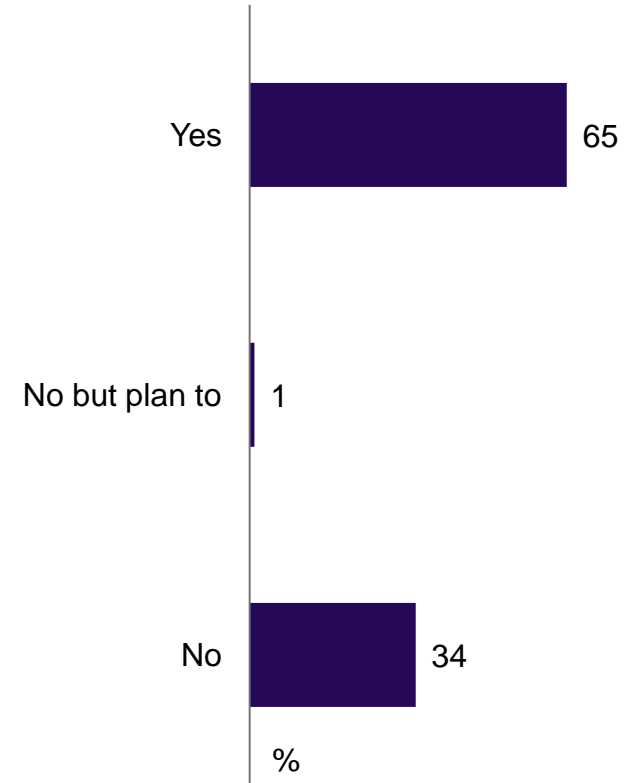
# Very few stolen items were recovered, although most were replaced

Whether stolen items were recovered / replaced

**Whether recovered items that were stolen**



**Whether replaced the items not recovered**



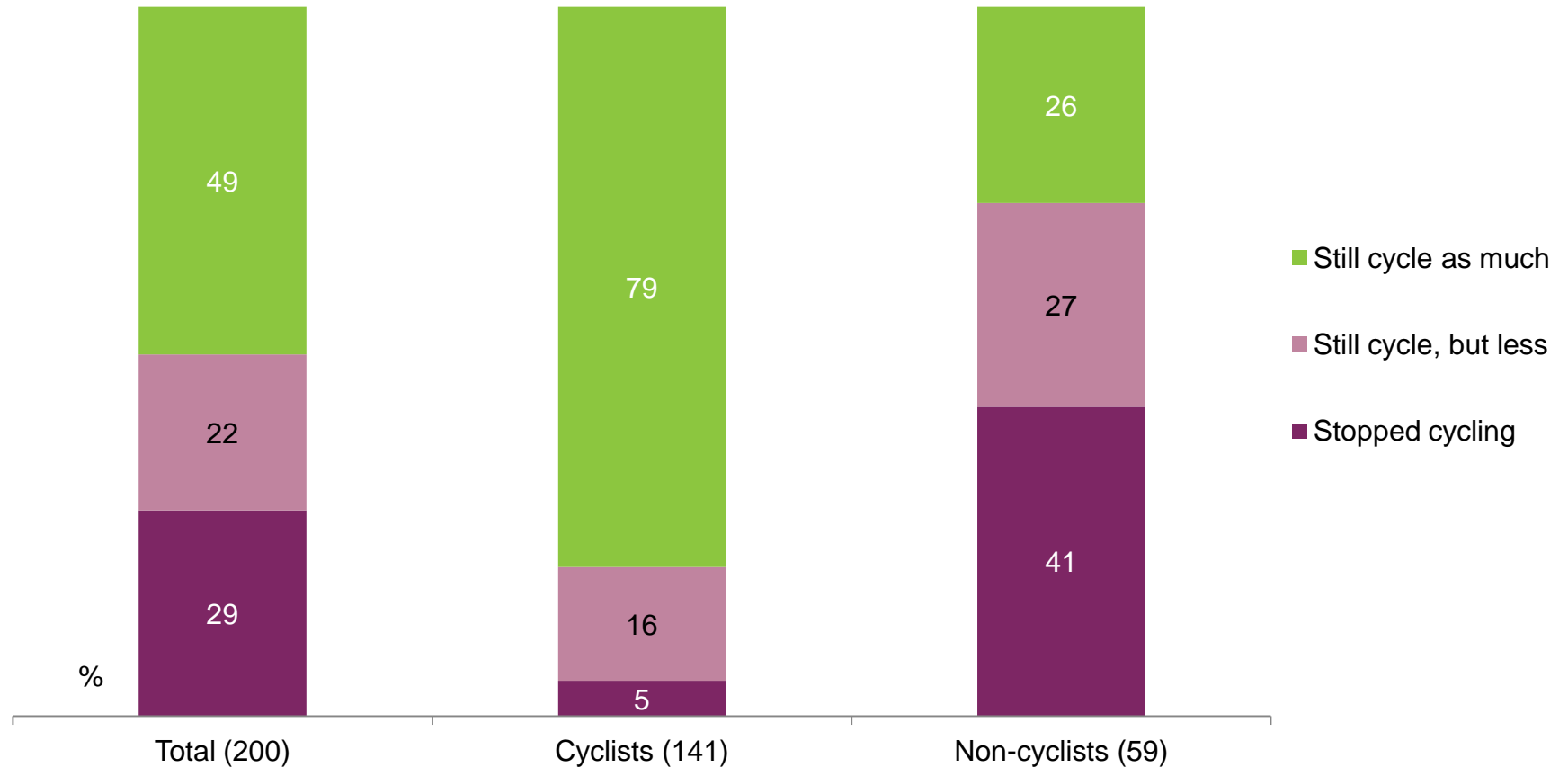
QL10: Did you recover the items that were stolen? Base: Those who have had a bike stolen (200)

QL11: Did you replace the items that you did not recover? Base: Those who have had a bike stolen and haven't recovered (191)



# Half of those who have experienced cycle theft have either stopped cycling, or are cycling less; amongst cyclists, almost all have continued cycling

## Impact of cycle theft on level of cycling

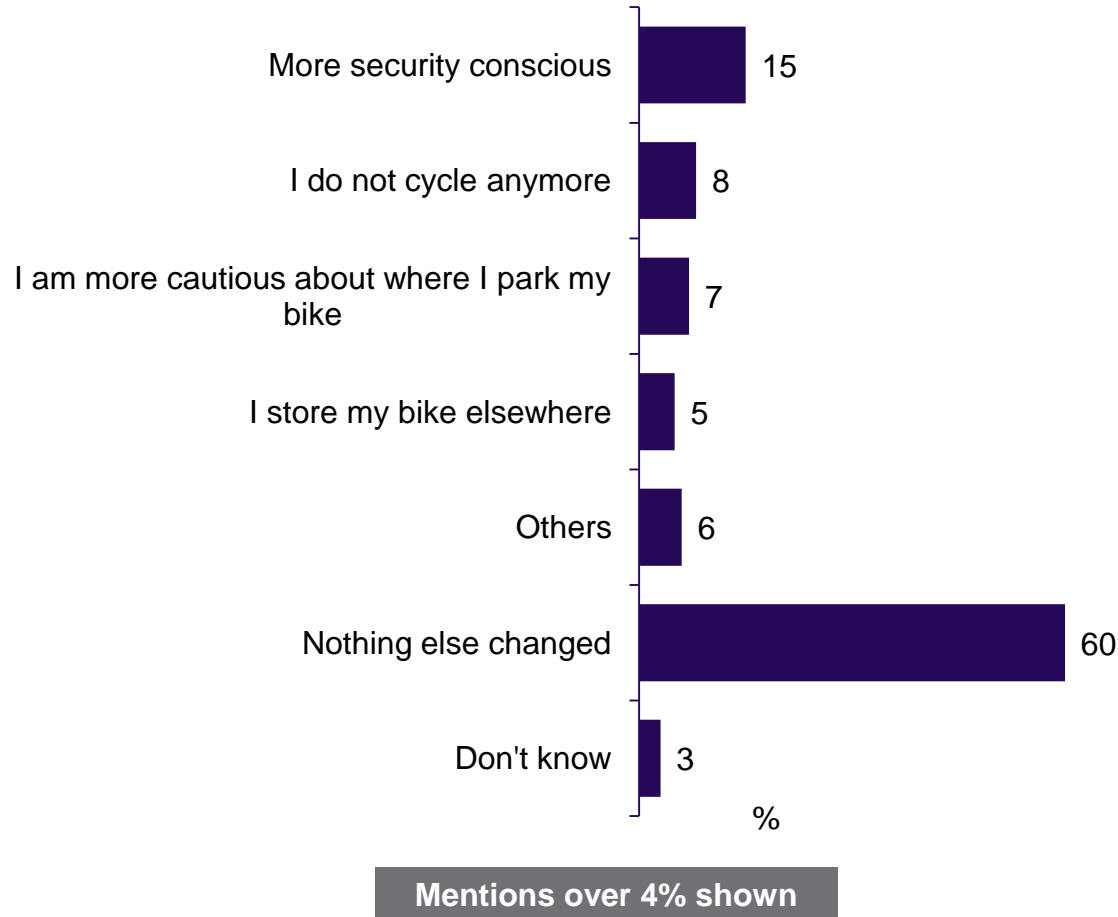


QL12: What impact did being a victim of theft have on your level of cycling? Base: Those who have had a bike stolen



# The majority of those to have experienced cycle theft made few changes to the way they cycle besides cycling less

## Behavioural change as a result of cycle theft



L13: Did being a victim of bike theft change anything about the way that you cycle?  
Base: Those who have had a bike stolen (200)



# Appendix

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# Appendix

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## Methodology

- The research comprised 1,00 telephone interviews with adult Londoners, plus 326 further interviews with cyclists to boost the total sample of cyclists to 505
- Fieldwork took place in March 2012
- The survey took place over the telephone and used the “next birthday rule” such that interviewers asked to speak to the person over the age of 16 in the household who celebrates their birthday next
- A random sample of London landlines was used to conduct the research
- The final data set was weighted back to be representative of Londoners in terms of age, gender, inner/outer London, ethnicity and working status according to 2001 census data
- For the cyclists, the next birthday rule was not used, the interview taking place with any cyclist in households called at random. Data for cyclists were weighted back to give an overall base of 1,000 – ie for total sample figures given in this document, cyclists are not over-represented





# Appendix

Variable	%
Gender	
Male	49%
Female	51%
Age	
16-24	15%
25-34	24%
35-44	20%
45-54	14%
55-64	11%
65+	16%
Ethnicity	
White	70%
BAME	29%

Variable	%
Working status	
Working	60%
Not-working	39%
Social class	
A	12%
B	28%
C1	21%
C2	11%
D	7%
E	15%

# → Biking borough comparison

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# Biking boroughs

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## Methodology

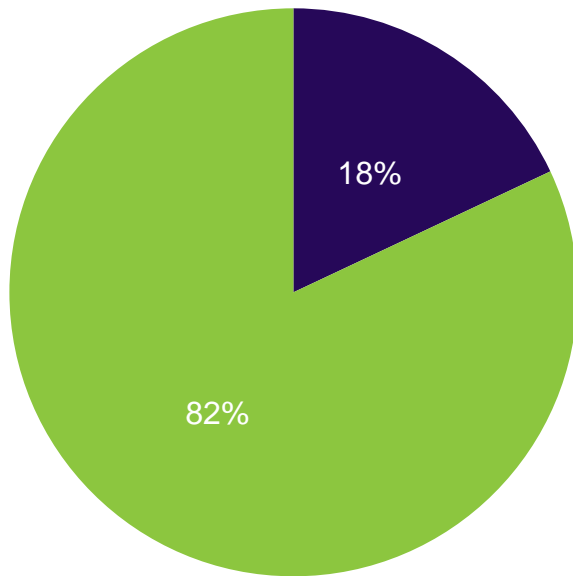
- In addition to the interviews with Londoners in general, a further 500 interviews were carried out in 'biking boroughs' (which receive special support from TfL in relation to cycling initiatives)
  - These boroughs are Barking & Dagenham, Bexley, Brent, Bromley, Croydon, Ealing, Haringey, Havering, Hillingdon, Hounslow, Kingston-upon-Thames, Merton and Redbridge
  
- This boost gave us a total sample of 832 interviews in biking boroughs, equating to approximately 60 interviews per borough
  - At a total sample level this provides reasonable confidence in the findings, however it is not possible to reliably break the sample down to provide findings on a borough by borough level
  
- These slides compare findings from London as a whole against those from the biking boroughs
  - Where we have reported 'total' findings, these include 409 interviews from biking boroughs gathered from the main stage of interviewing, with the remainder coming from other London boroughs



# Incidence of cycling

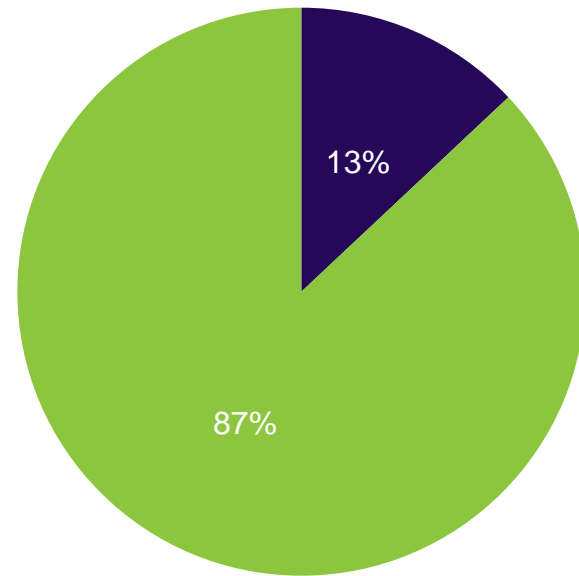
**Total  
Cyclists and non-cyclists**

■ Cyclist    ■ Non-cyclist



**Biking boroughs  
Cyclists and non-cyclists**

■ Cyclist    ■ Non-cyclist



**Cyclists are those who sometimes use a bike to get around London.  
Non-cyclists never use a bike to get around London**

QFREQ: Which of these modes of transport do you ever use to get around London?

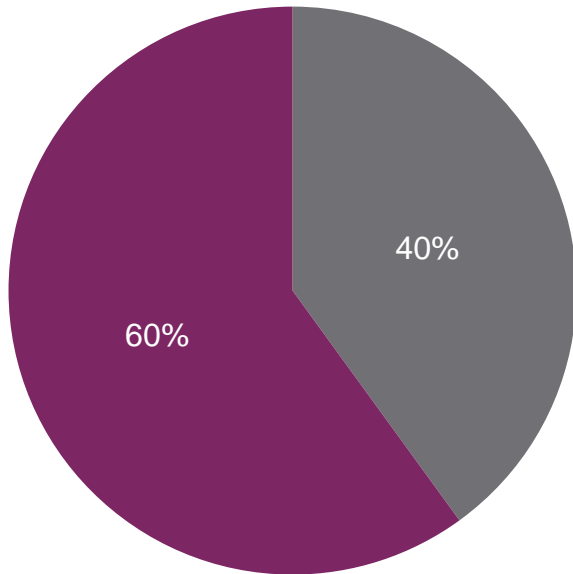
Base: All (Total, 1,326; Cycling Boroughs, 832)



# Frequency of cycling

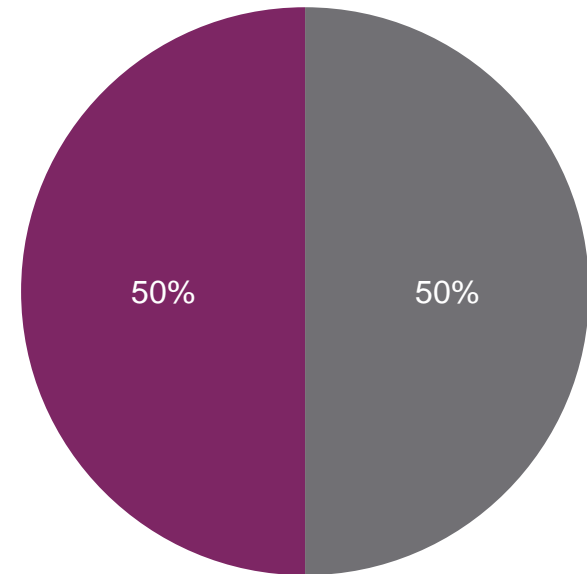
**Total**  
**Regular and occasional cyclists**

■ Occasional cyclist   ■ Regular cyclist



**Biking boroughs**  
**Regular and occasional cyclists**

■ Occasional cyclist   ■ Regular cyclist



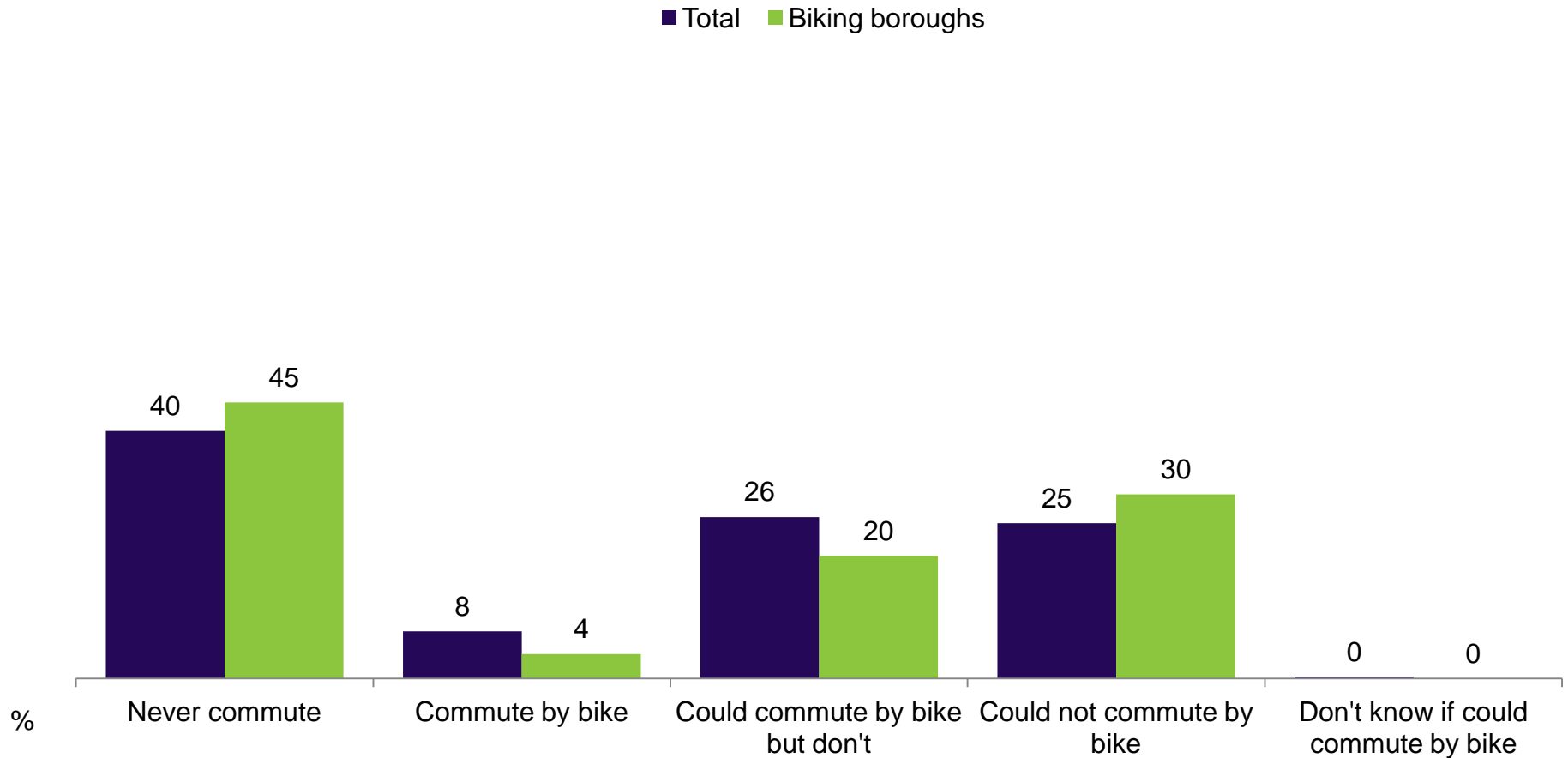
**Regular cyclists are defined as cycling at least once a week.  
Occasional cyclists cycle less often than once a week**

*QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London?  
Base: All (London cyclists, 508; Biking boroughs , 100)*



# Commuting by bicycle

## Propensity to commute by bike



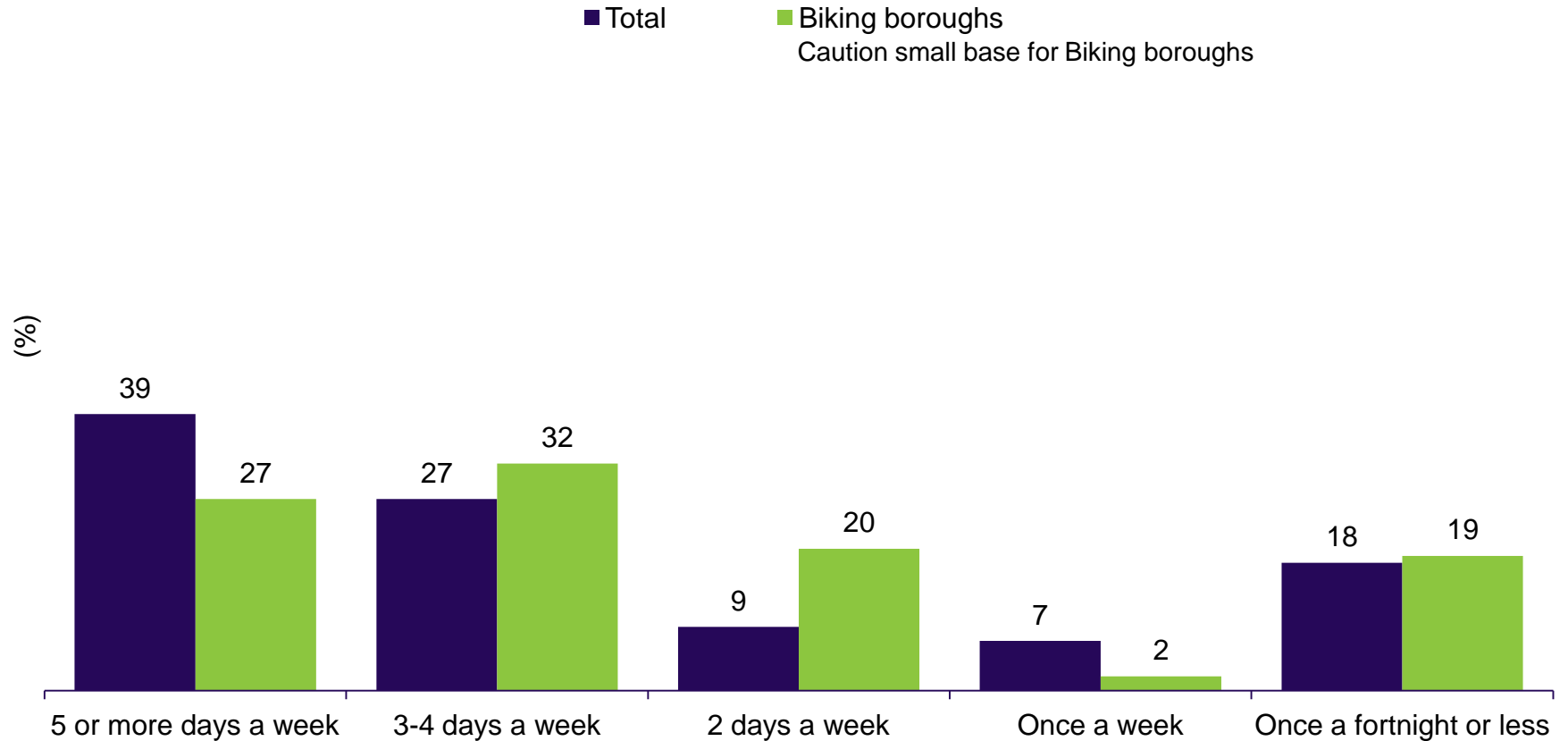
G1: Do you ever commute in London, by which I mean travelling to work, school, college or university? G2: Which types of transport do you use to do this? G4: Could you cycle to work, school, college or university?

Base: all (2012: 1,326; biking boroughs 832)



# Frequency of commuting by bicycle amongst those that do at all

## Frequency of commuting by bike



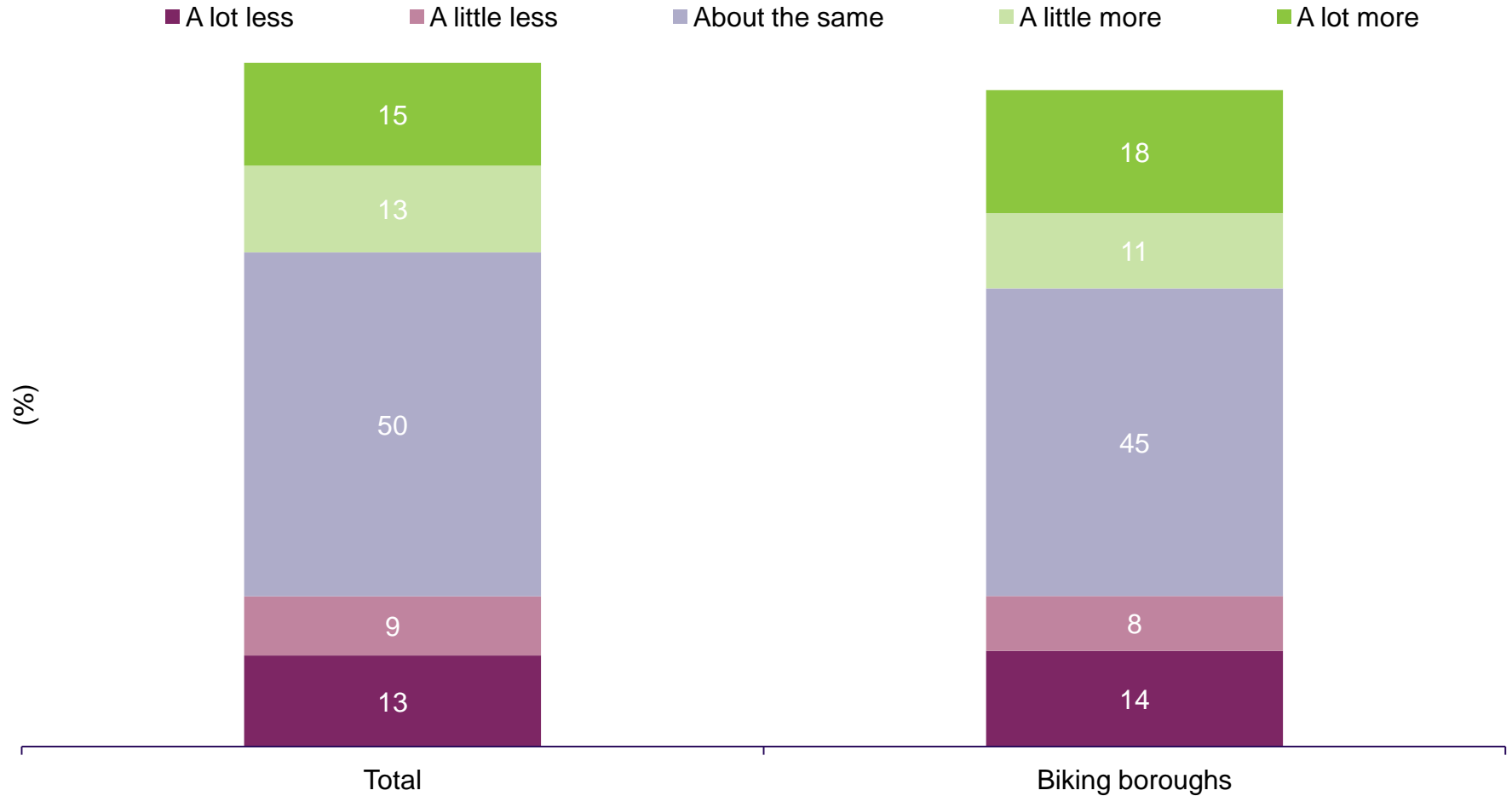
G3: Typically, how often do you cycle as a means of commuting in London?

Base: Those commuting by bike (Total: 165; biking boroughs: 24)



# Change in level of cycling over the past year

Frequency of travelling by bike compared with last year



D1. How do you think the amount you cycle in London is compared to this time last year? Would you say you now cycle...?

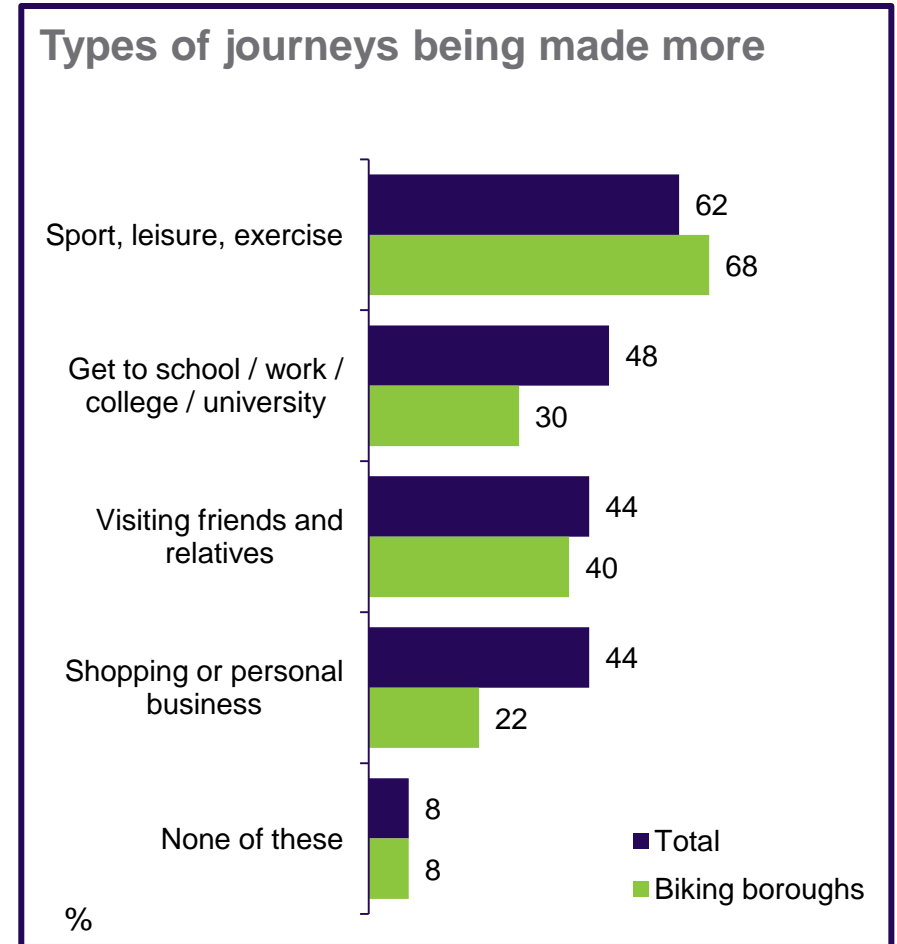
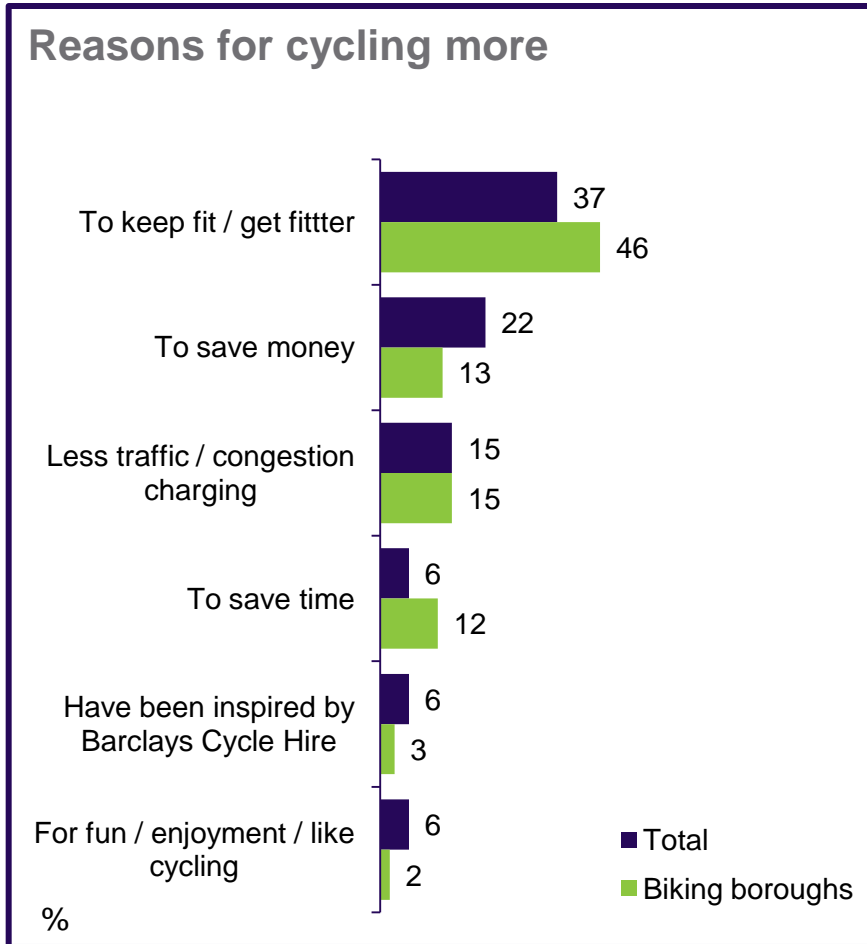
Base: All cyclists (Total, 505; biking boroughs, 105)





# Reasons for cycling more, and purpose of extra journeys

## Reasons for cycling more, and purpose of extra journeys



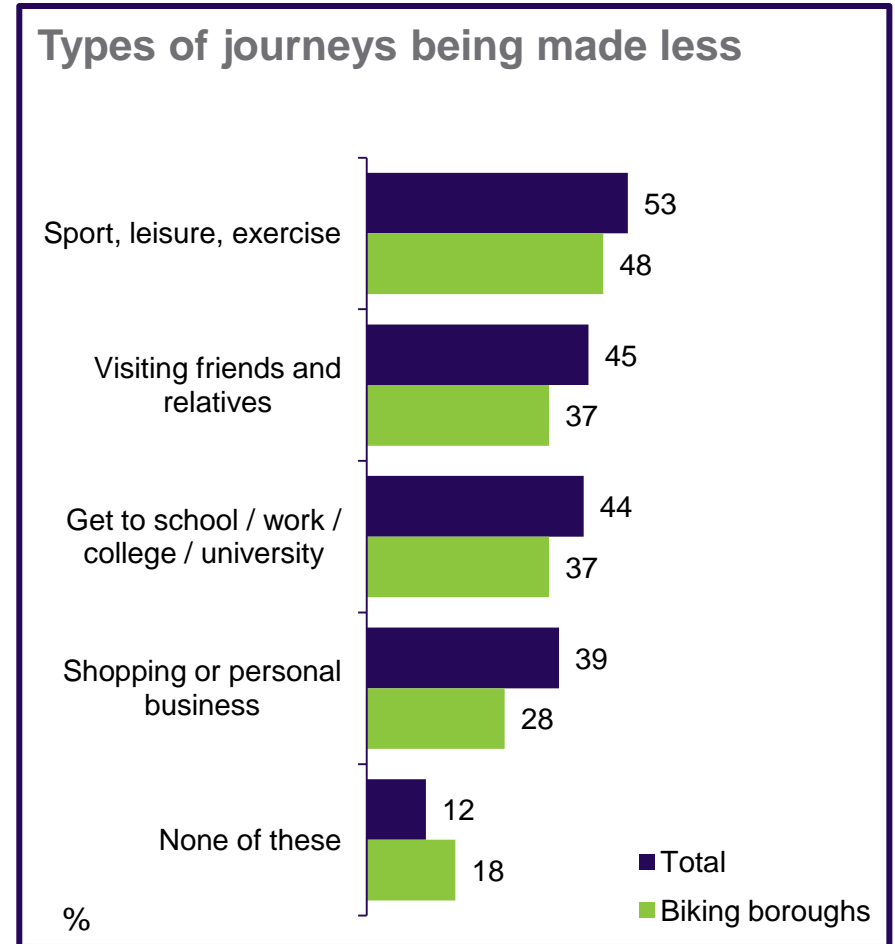
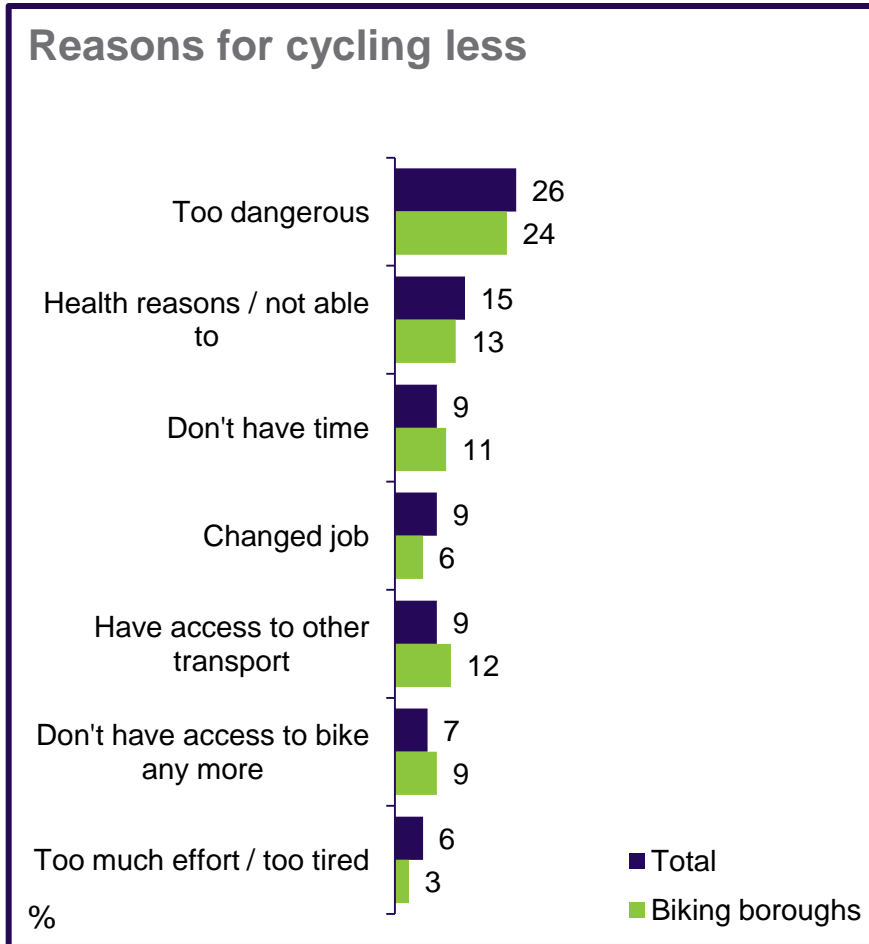
D2. Why have you started cycling more this year? D3. What sort of trips have you been making more by bike compared with this time last year?

Base: All making more trips (total, 143; biking boroughs, 54)



# Concerns about safety are most likely to reduce the amount people cycle; all kinds of trips are affected by this

## Reasons for cycling less, and types of trips being made less



D4/D6: Why are you cycling less this year? / What sort of trips having you been making less by bike this year compared with this time last year?  
Base: All making fewer trips (total, 202; biking boroughs, 118)



# Behaviour change model – definitions

	Grouping	Cyclists Total sample	Cyclists Biking boroughs
You don't want to or would not consider doing this	Pre-primed	3%	3%
You have never thought about doing this	Pre-primed	3%	3%
You have given it some thought but are not going to do it	Pre-primed	13%	15%
You are thinking about doing this	Primed	16%	18%
You have decided to do this (you have just decided but not yet started to do anything about it)	Primed	7%	6%
You are setting things in place and / or are seeking more information about this	Preparation	6%	5%
You have started doing this but are finding it difficult	Change	7%	5%
You have started doing this and are finding it easy	Change	7%	4%
You are already doing this and will continue to do so	Normalised	33%	29%
You were doing this but couldn't stick to it	Primed	4%	10%

*B1: Thinking about the possibility of "cycling more", which of these descriptions would you say most applies to you?*

*Base: all cyclists (total, 484; biking boroughs, 97)*



# Behaviour change model – definitions

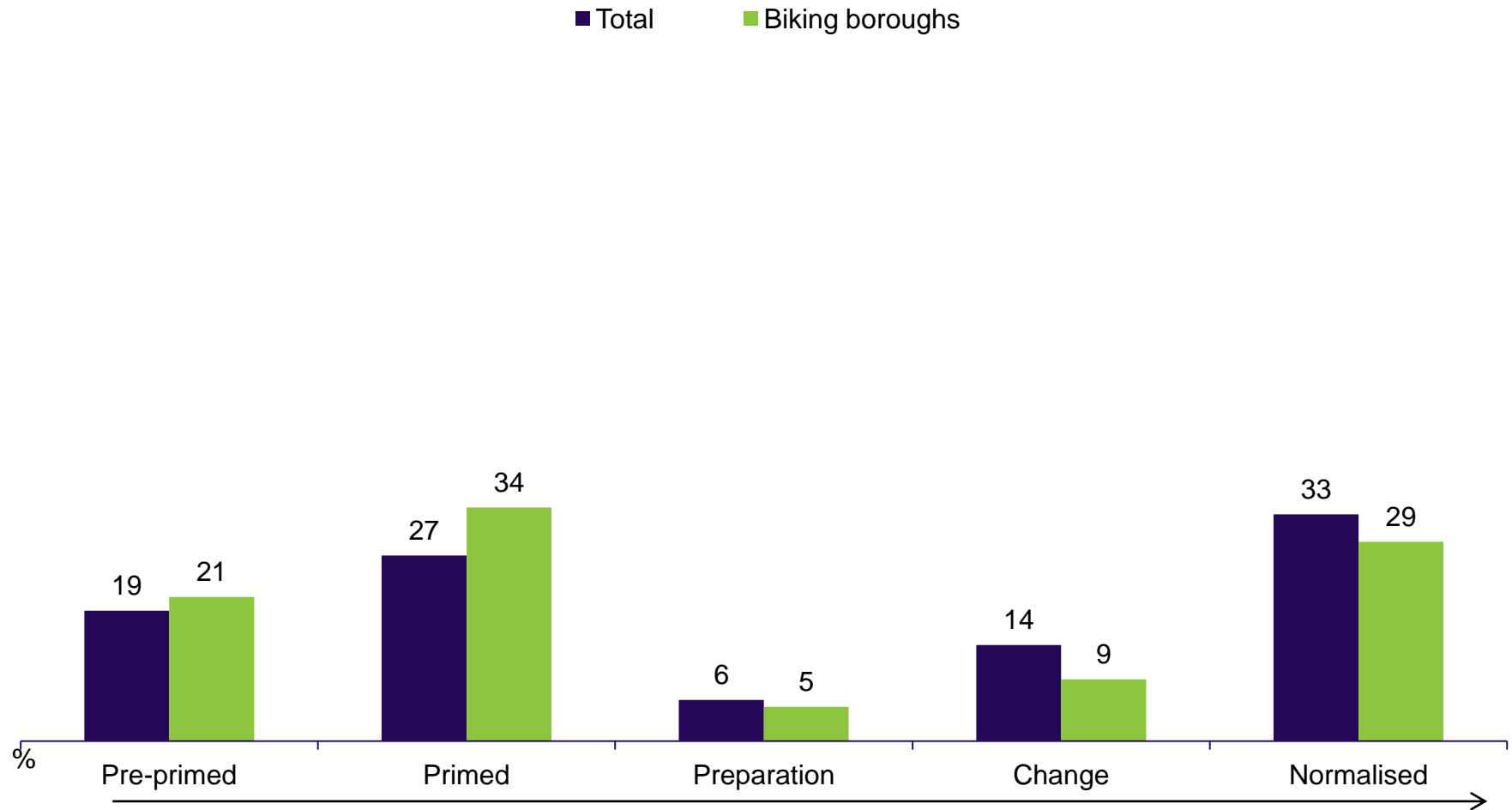
	Grouping	Non cyclists Total sample	Non-cyclists Biking boroughs
You don't want to or would not consider doing this	Pre-primed	36%	35%
You have never thought about doing this	Pre-primed	10%	12%
You have given it some thought but are not going to do it	Pre-primed	28%	27%
You are thinking about doing this	Primed	12%	13%
You have decided to do this (you have just decided but not yet started to do anything about it)	Primed	5%	5%
You are setting things in place and / or are seeking more information about this	Preparation	1%	*
You have started doing this but are finding it difficult	Primed	2%	2%
You have started doing this and are finding it easy	Primed	1%	*
You are already doing this and will continue to do so	Primed	2%	4%
You were doing this but couldn't stick to it	Pre-primed	4%	3%

B2: Thinking about the possibility of "taking up cycling", which of these descriptions would you say most applies to you?

Base: all non-cyclists (total, 842; biking boroughs, 735)

# ➔ Behaviour change, cyclists

## Cyclists (trend)



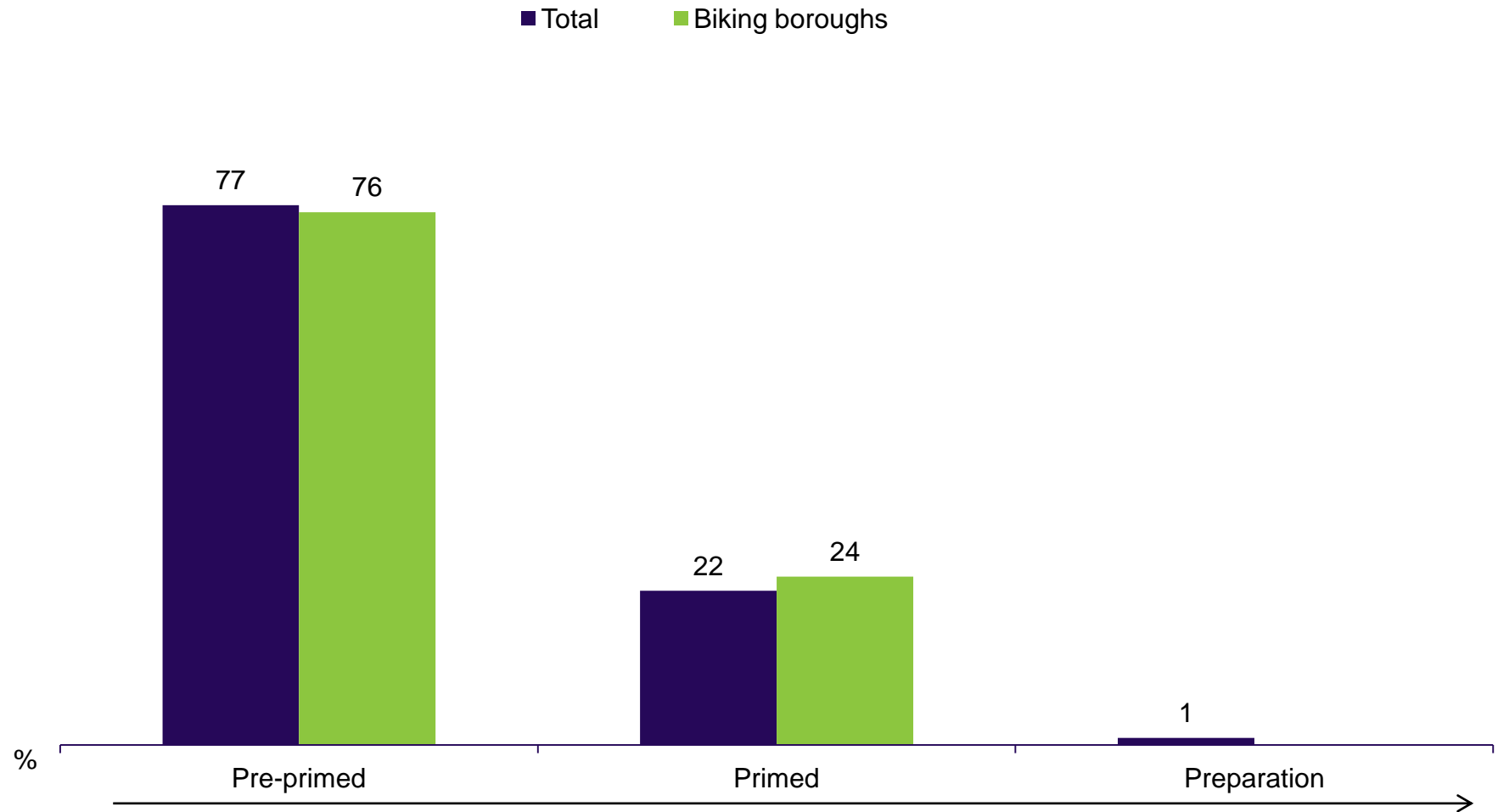
B1: Thinking about the possibility of “cycling more”, which of these descriptions would you say MOST applies to you?

Base: Those who have cycled around London within the last 12 months, (Total, 484; biking boroughs, 97)



# Behaviour change, non-cyclists

## Non-cyclists



B2: Thinking about the possibility of 'taking up cycling', which of these descriptions would you say MOST applies to you?

Base: Non-cyclists and those who have cycled around London but not in the last 12 months, (Total, 842; biking boroughs, 735)

# → Appeal of transport modes

## Appeal of cycling compared to other modes

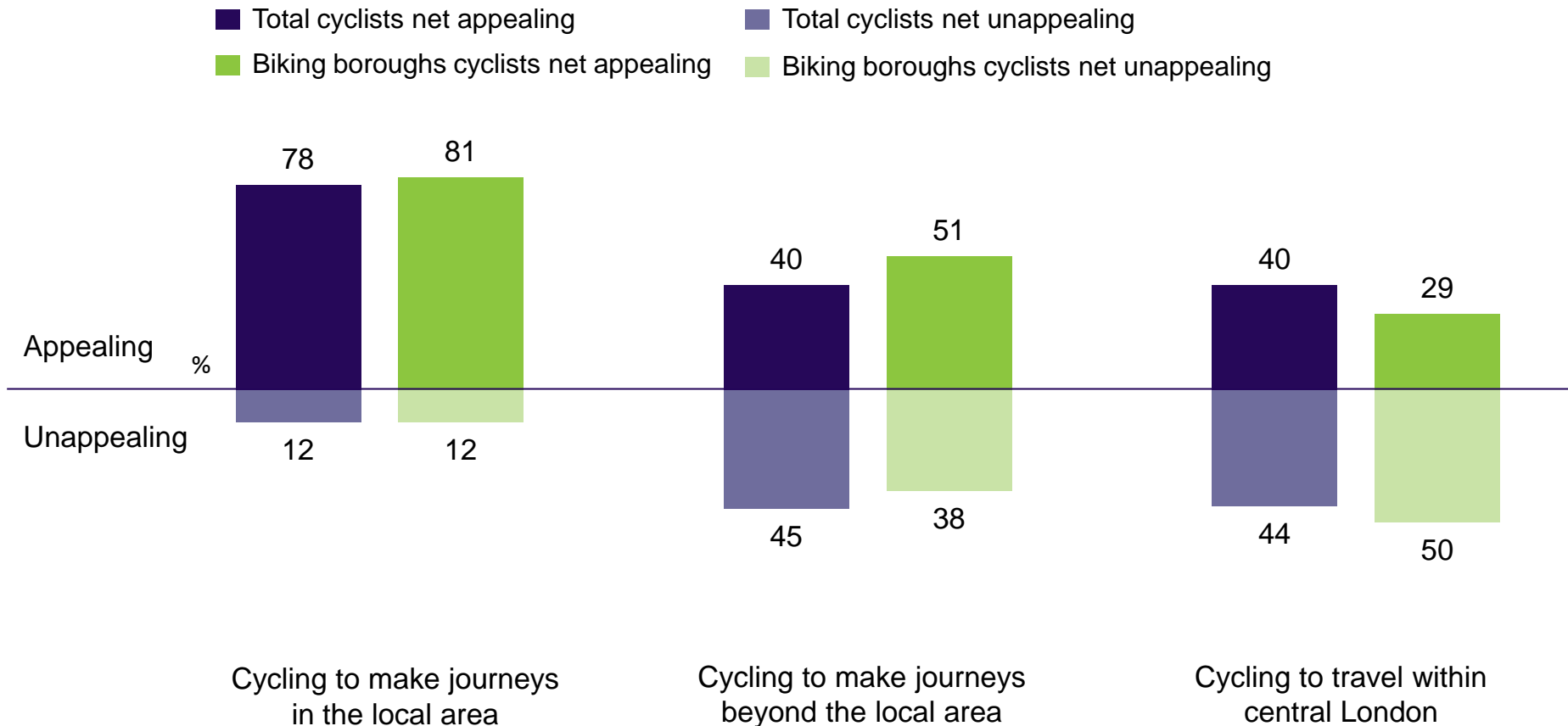
	Appealing		Unappealing	
	Total	Biking boroughs	Total	Biking boroughs
Walking	85%	81%	8%	8%
Train	68%	66%	17%	17%
Bus	59%	55%	27%	28%
Car	59%	57%	28%	27%
Tube	55%	58%	31%	27%
Cycling	39%	33%	45%	48%

A4: For each means of travel that I read out, I would like you to tell me how appealing or unappealing you find it. So firstly what about travelling by XXX? Would you say that is ....?

Base: (Total, 1,326; biking boroughs, 832)

# → Appeal of cycling scenarios

## Appeal of cycling in specific scenarios – cyclists



A5: Thinking specifically about cycling, can you please tell me how appealing or unappealing you find it for XXX. Do you find it ...?

Base: (Total cyclists, 482; biking borough cyclists, 102)





# Agreement with statements about cycling in London

	Total	Biking boroughs
Cycling is becoming more popular	88	85
Cycling is enjoyable	81	79
Cycling is a family activity	73	74
Cycling is a good social activity	75	74
Cycling is a method of transport that you would want to be seen using	56	50
Cycling is a method of transport that I would use and/or recommend	53	49
Cyclists are vulnerable to other road users	91	92
Traffic makes people afraid of cycling on London streets	90	87
Cycling is a safe way of getting about	28	27
I feel confident cycling on London's roads	25	24
Cycling is a convenient way of getting around	81	78
Cycling is the fastest way to travel for short journeys	79	76
Cycling gets you to your destination when you expect to arrive	72	66
Cycling is good for rush hour journeys in London	59	60
Cycling is often the fastest way to get around London	60	56

A1: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All (2012, 1,326; biking boroughs, 832)



# Agreement with statements about cycling in London

	Total	Biking boroughs
Cycling is stressful	56	52
Cycling is not for people like me	39	41
I can't be bothered to take up cycling	33	35
I am not fit enough to cycle	25	25
There are times when I could cycle, but it's too much effort	48	47
My local area is good for cycling	61	61
I see lots of people cycling in and around my local area	61	52
Information and signs make it easy to find your way when cycling	59	54
There are good facilities for cyclists in London	53	53
London is a city for cycling	37	38
<b>Cyclists only</b>		
I love the freedom cycling gives me	87	83
I love my bike	73	73

A1: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All (2012, 1,326; biking boroughs, 832)



# Perceptions of cycling infrastructure

## Ranking of potential deterrents

	Good		Poor	
	Total	Biking borough	Total	Biking boroughs
Availability of information on cycle routes	57	48	21	24
Availability of cycle lanes/advance stop lines	42	37	32	35
Availability of cycle racks/stands	37	30	43	51
Safety of cycling in the area	32	32	39	44
Quality of environment for cycling	27	38	45	39
Security of bike when it is left	17	19	58	58

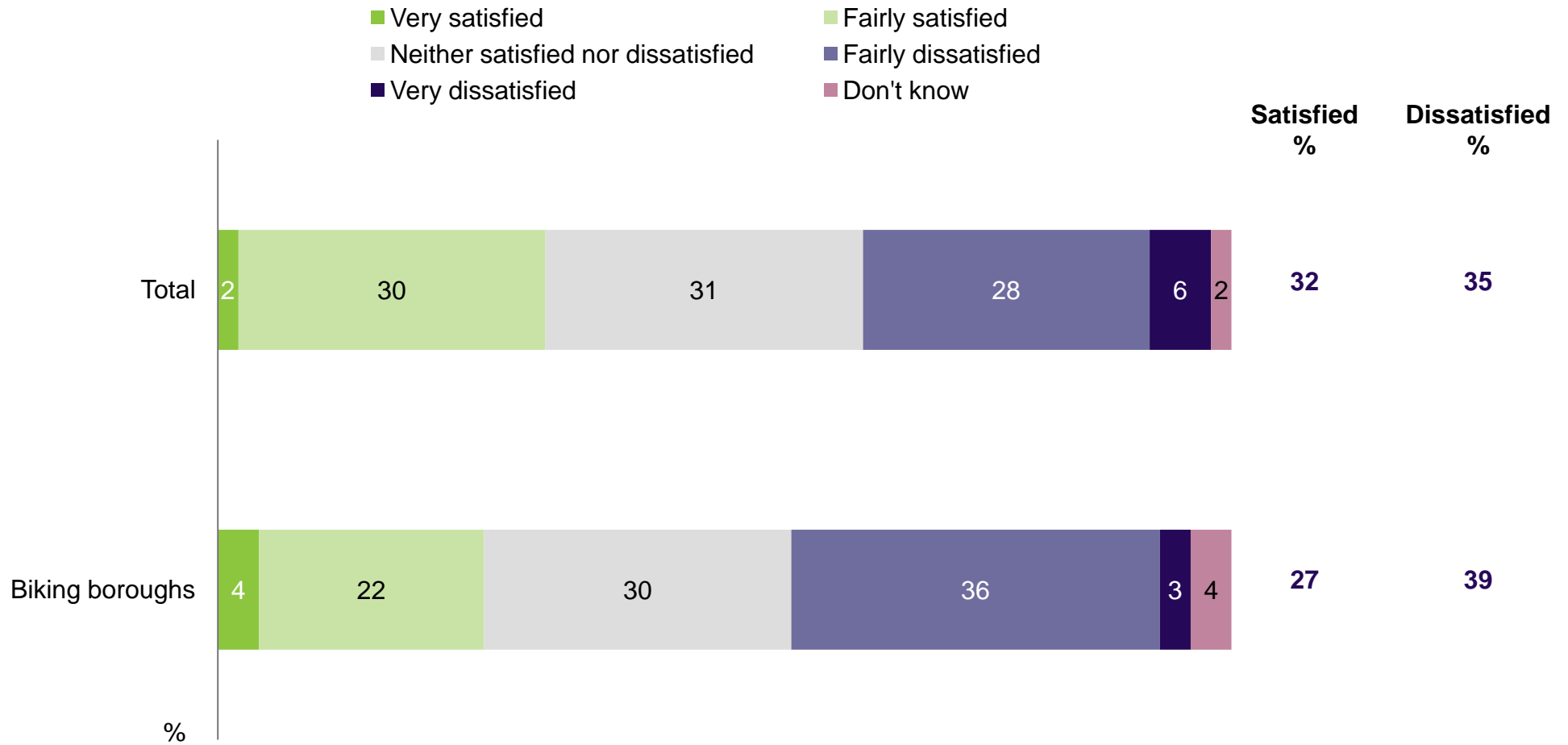
A2: How would you rate the following aspects of cycling in London?

Base: Those who have cycled around London within the last 12 months (Total, 505; biking boroughs, 105)



# Satisfaction with cycle parking facilities

## Satisfaction with cycle parking facilities



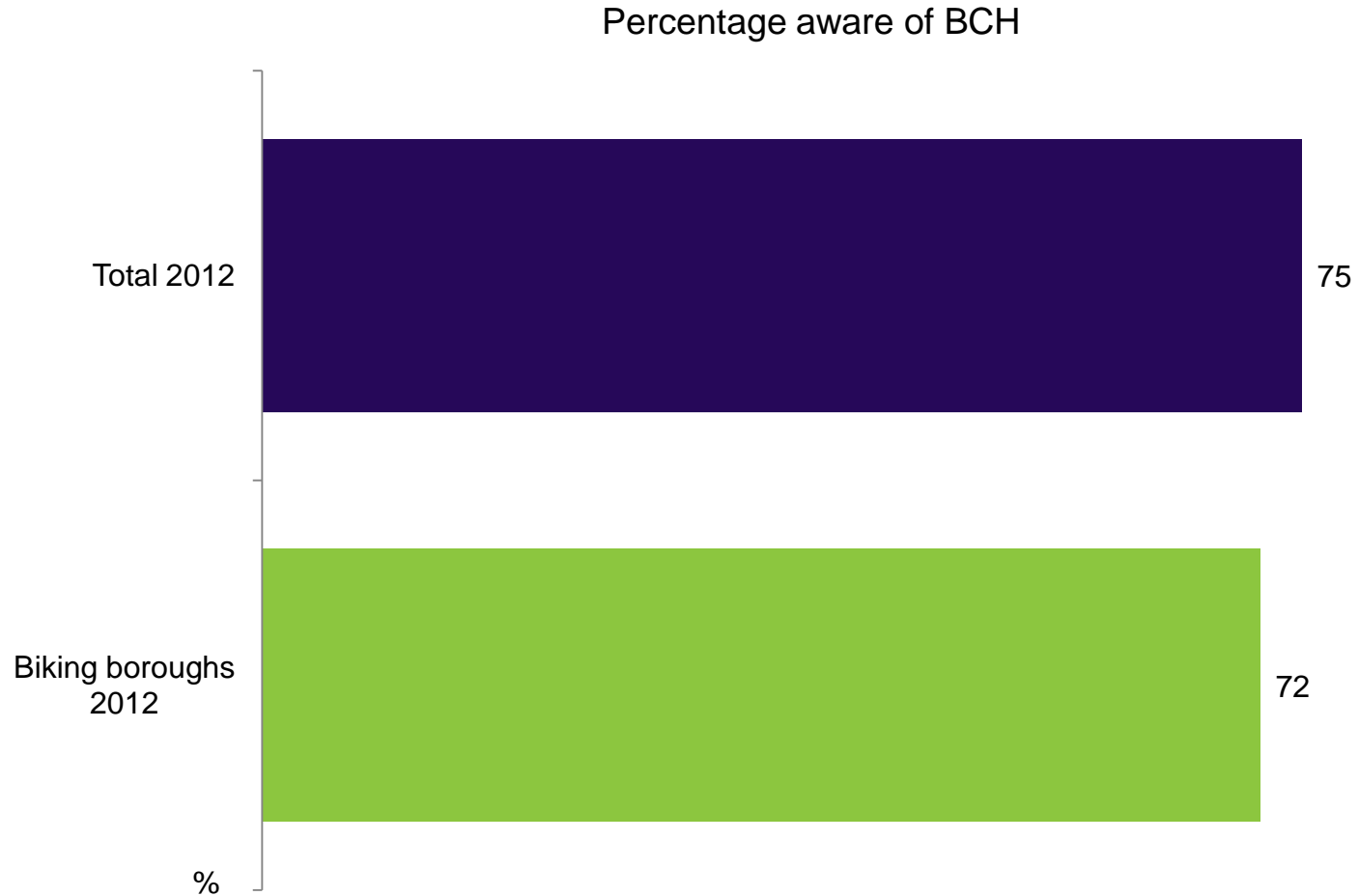
A3: How would you rate your level of satisfaction with the parking facilities for bicycles in London?

Base: Those who have cycled around London within the last 12 months (Total, 505; biking boroughs, 100)



# Awareness of Barclays Cycle Hire

## Awareness of Barclays Cycle Hire



N1: Are you aware our the Barclays Cycle Hire scheme?  
Base: All (2012 , 1,326; biking boroughs, 832)

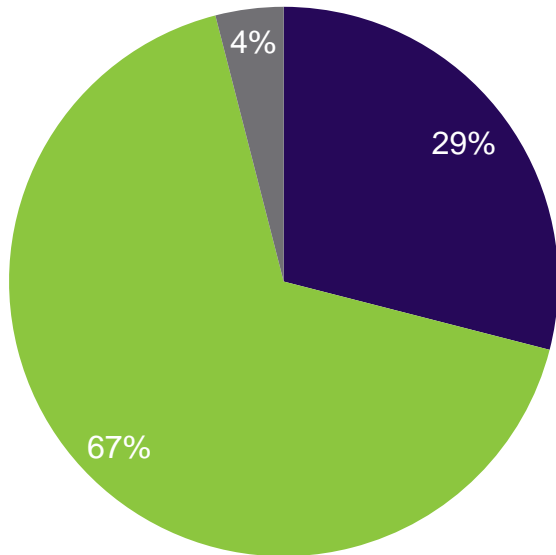


# Intended use of BCH

## Intended use

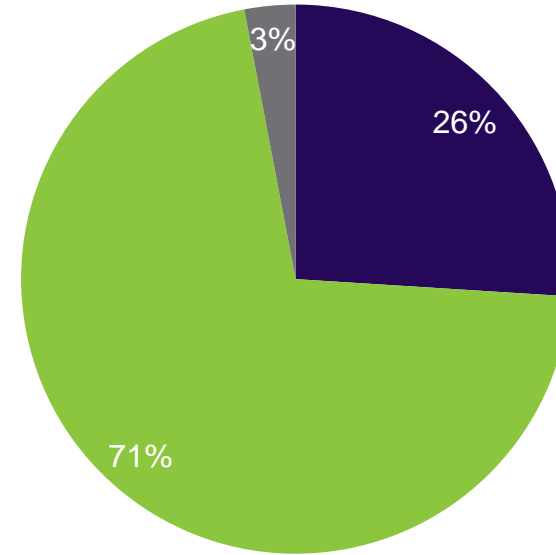
**Intention to use  
Total**

■ Yes   ■ No   ■ Don't know



**Intention to use  
Biking boroughs**

■ Yes   ■ No   ■ Don't know

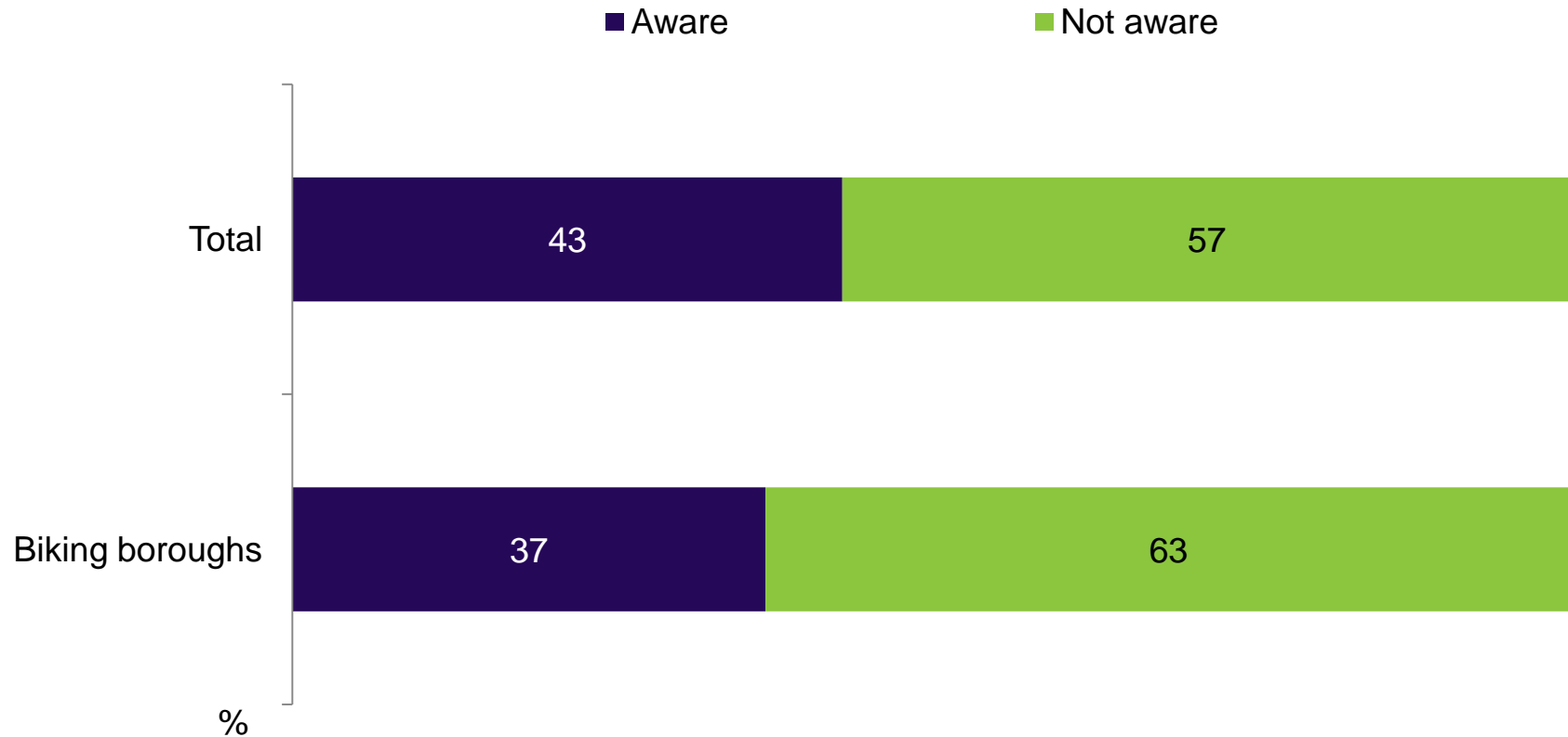


QN3: Do you intend to use Barclays Cycle Hire in the future?  
Base: all Barclays Cycle Hire Non-Users (Total, 1,220; biking boroughs, 814)



# Awareness of Eastern Expansion area

Eastern expansion area

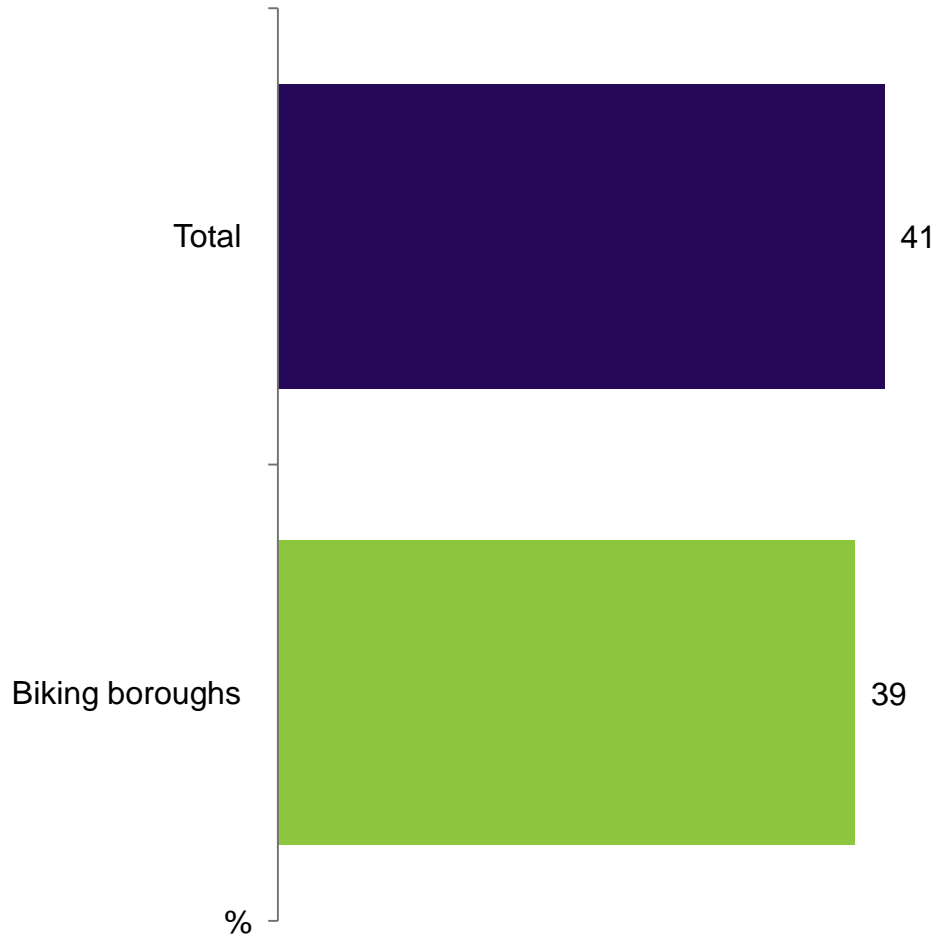


QN7: Were you aware that the area covered by Barclays Cycle Hire is expanding from Central London to include more of East London?  
Base: Those aware of Barclays Cycle Hire (Total, 752; biking boroughs, 590)



# Awareness of Barclays Cycle Superhighways

## Awareness of Barclays Cycle Superhighways

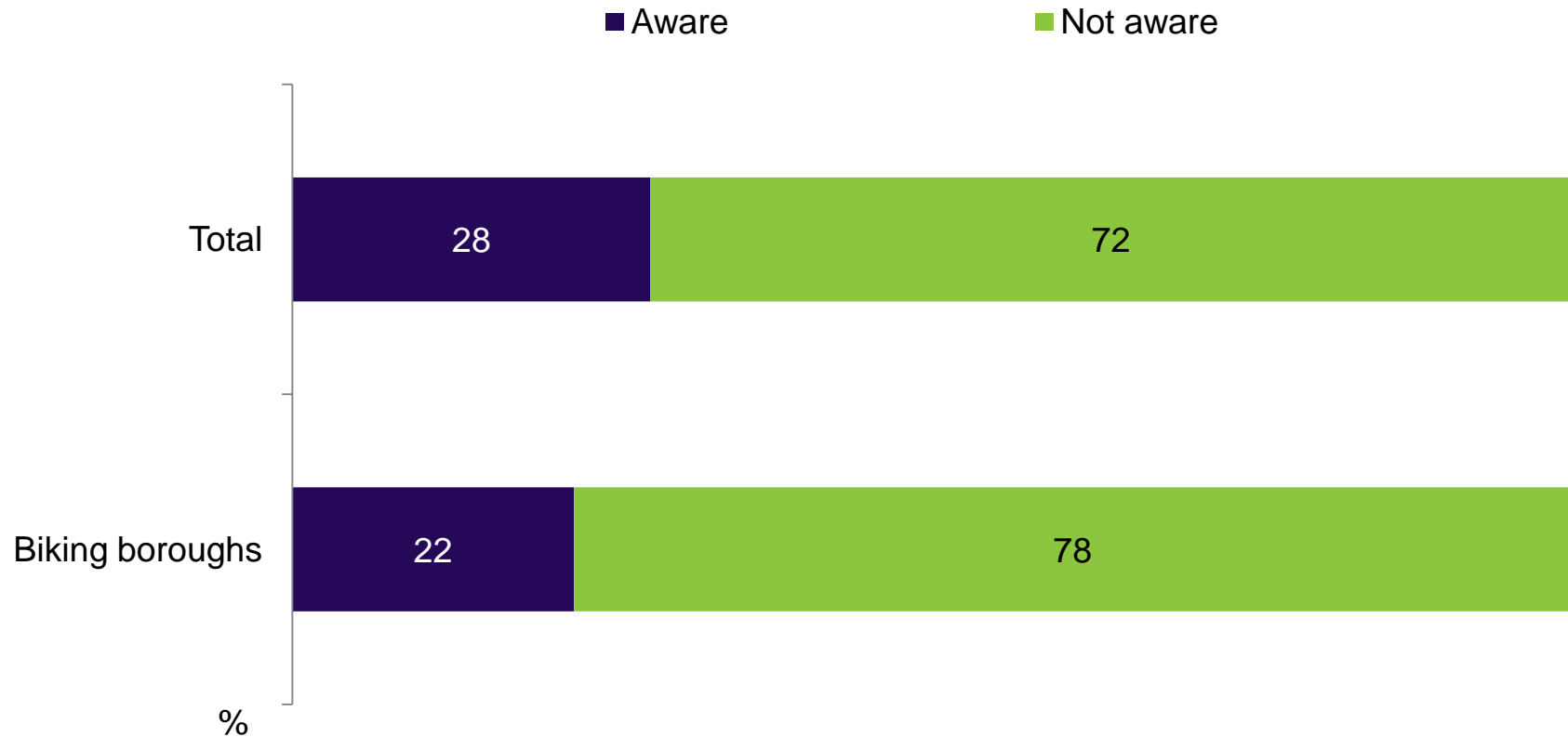






# Awareness of extent of BCSH network

Awareness that there will be 12 BCSH routes in total



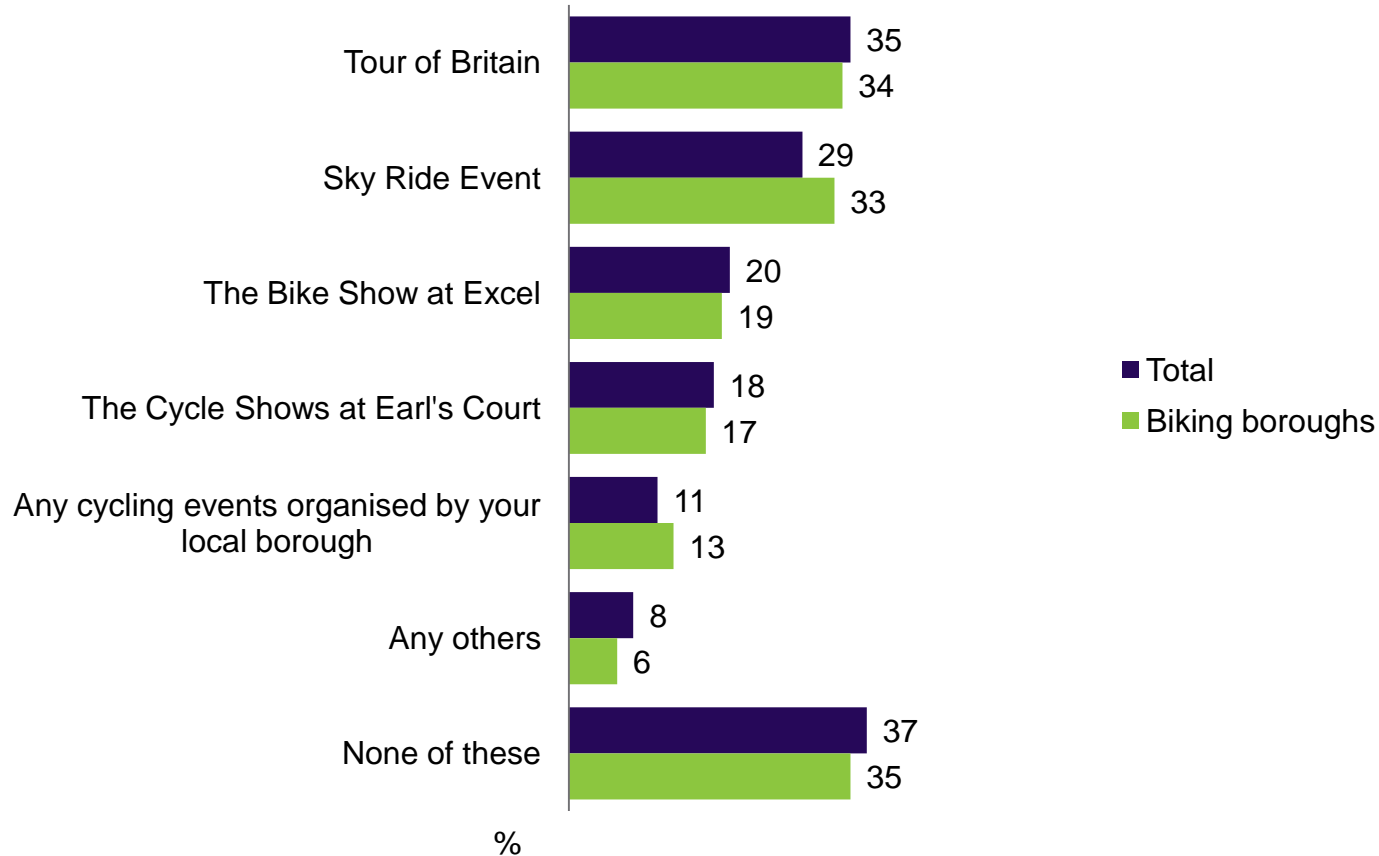
M8. Were you aware that only four out of twelve Barclays Cycle Superhighways have currently been built and that the scheme will be expanded over the coming years?

Base: Those aware of Barclays Cycle Hire (Total, 505, biking boroughs, 313)



# Awareness of cycling events

## Awareness of cycling events



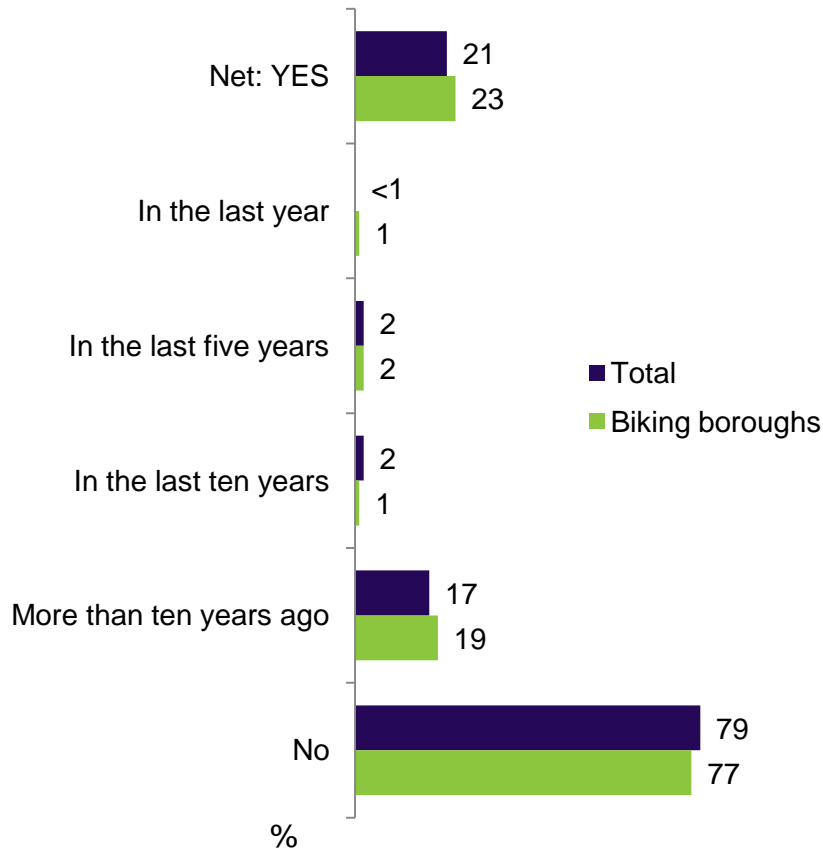
P1: Which of these cycling events in London over the last 12 months have you heard of?

Base: All (Total, 1,326; biking boroughs, 832)

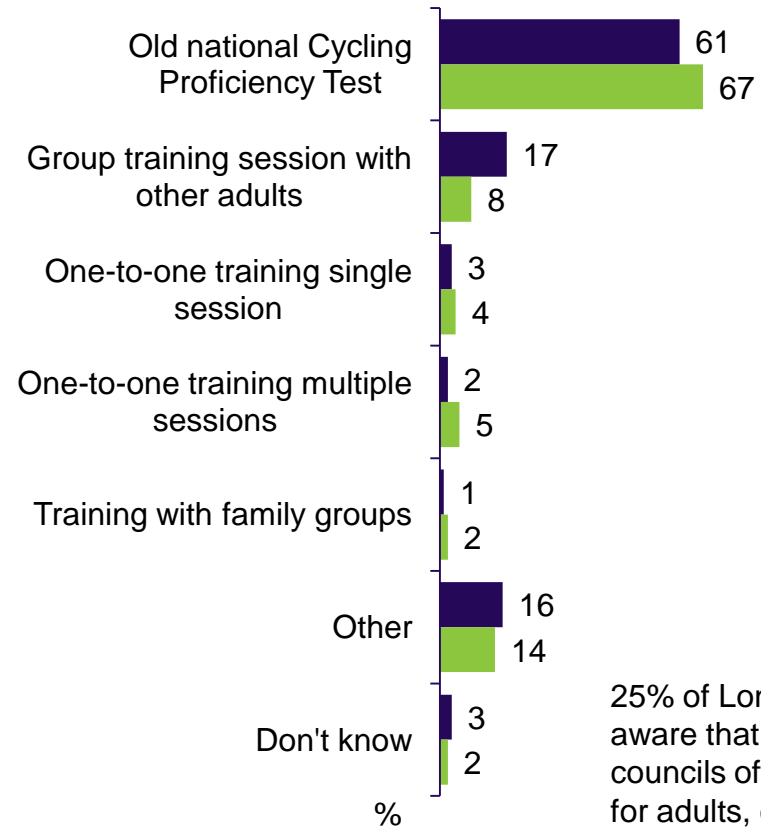
# → Experience of cycle training

## Experience of cycle training

### Cycle training attendance



### Type of cycle training attended



25% of Londoners are aware that most local councils offer cycle training for adults, compared with 24% of those in biking boroughs

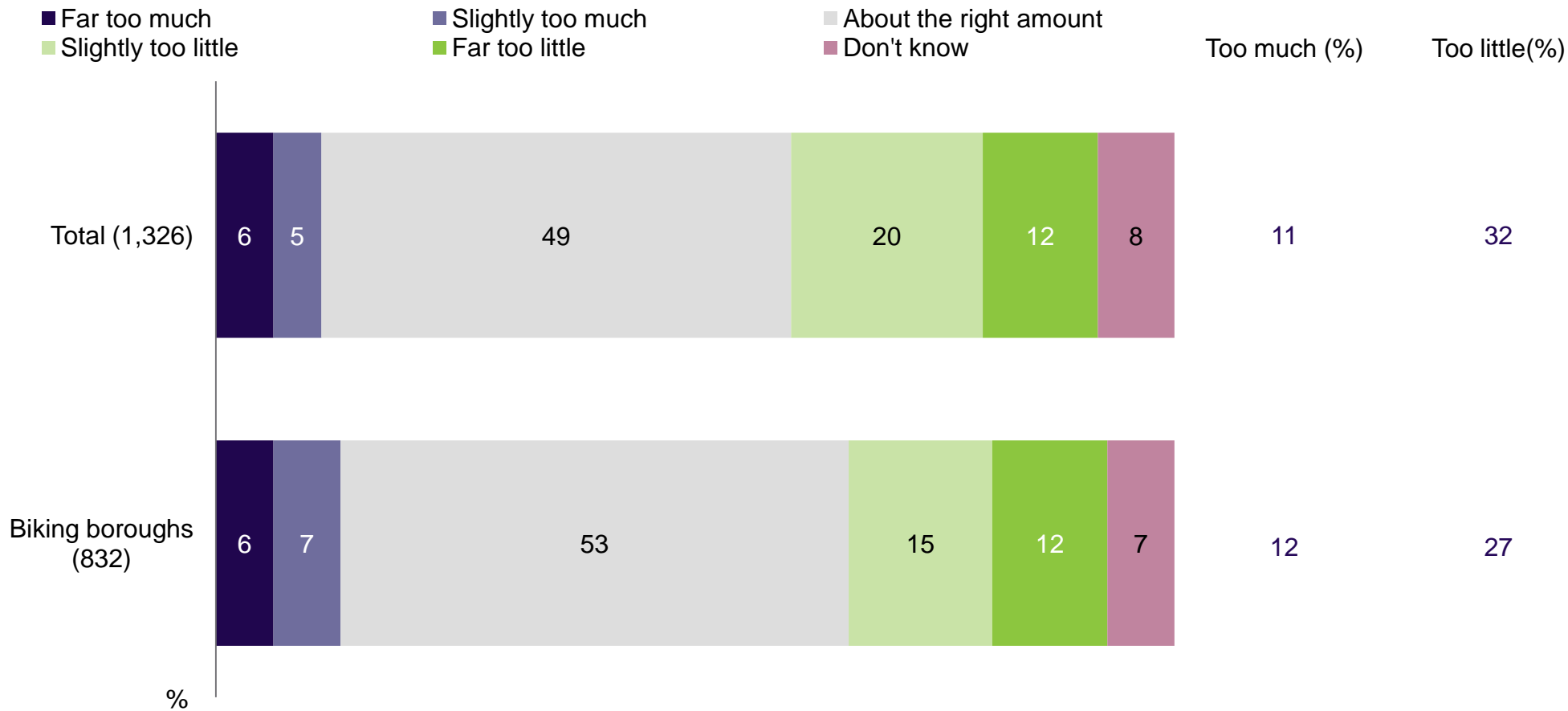
Q1: Have you ever attended any cycle training? Base: all (total, 1,326; biking boroughs, 832)

Q3: What sort of cycle training did you have? Base: All those who have attended cycle training (Total, 304; biking boroughs, 171)



# Views on investment in cycling

## Investment levels in cycling



Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount?

Base: all (Total, 1,326; biking boroughs, 832)