



Influencing the growth of cycling in London

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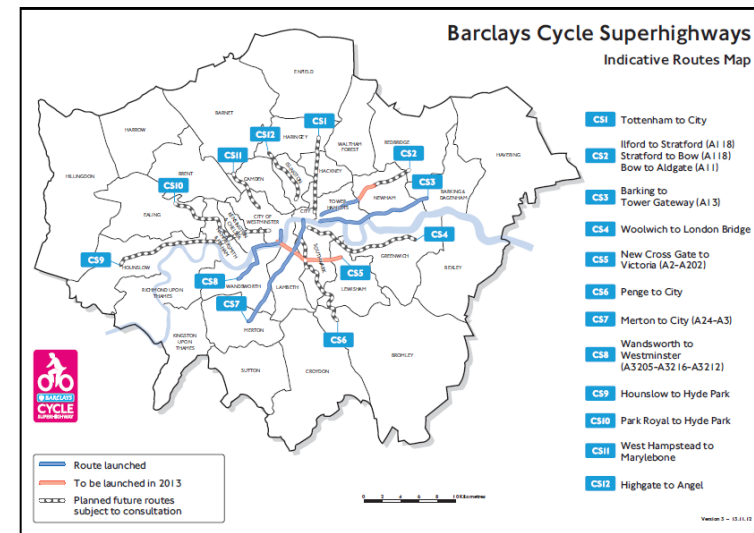
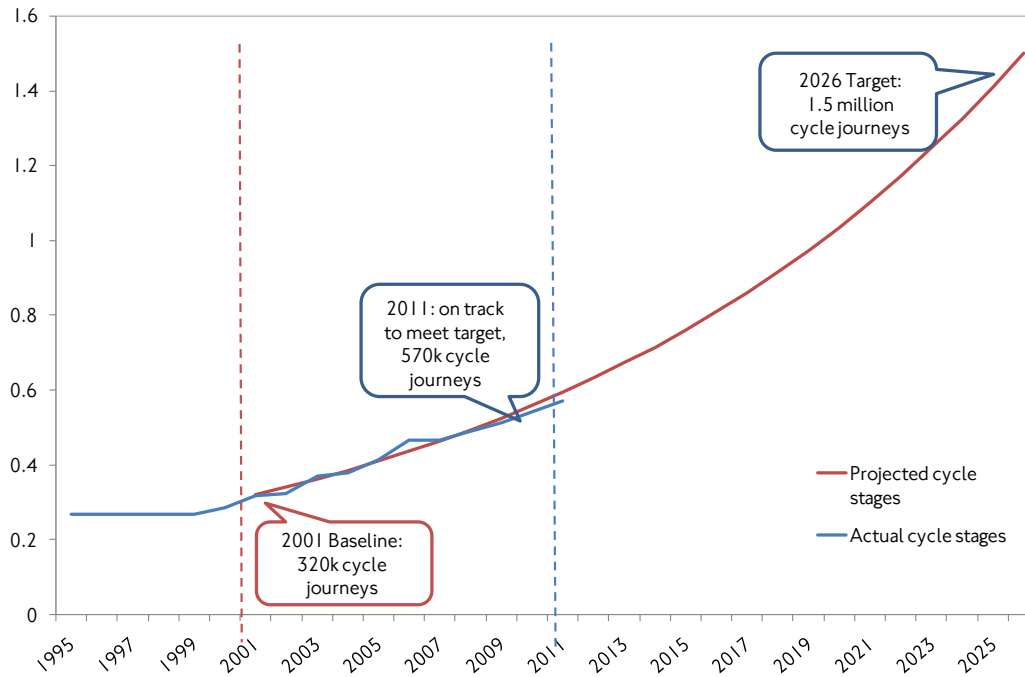
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Transport for London and Cycling

The Mayor's Transport Strategy sets out his aim for cycling journeys in London to increase from 2% of all journeys in 2001 to 5% by 2026. This means getting more people to take up cycling in London, as well as getting existing cyclists to cycle more often.

A comparison of growth in cycling to date and an estimated growth trajectory to meet the Mayor's target in 2026.



Barclays Cycle Hire and Cycle Superhighways

Barclays Cycle Hire

- Increasing the amount of cycling travel in London. 95 per cent of journeys were previously made by another mode or not at all.
- Many users are new to cycling in London; in total, 7 in 10 said that the scheme had prompted them to start cycling in the city or to cycle more often. Just over 1 in 8 said that using the scheme had encouraged them to use their own bike more.
- Scheme users say they were benefiting from it – as well as agreeing the scheme provided a quick and convenient mode of travel, the majority of users were enjoying using the hire bicycles and were seeing benefits to their health and fitness.



Barclays Cycle Superhighway

- Delivering increased cycle flows and encouraging existing cyclists to increase the amount they cycle. Also encouraging use for journeys previously made by other modes and new cycle journeys.
- Offering a fast, direct route into central London, the routes are mainly appealing to commuters but are also used for other purposes off peak and at the weekends.
- Aspects of the routes that appeal most to users are the visibility of the blue markings, good quality of the road surface, and that they provide a direct route to key destinations.
- Cyclists generally agreed that they were benefiting from an improved journey experience as a result of the introduction of the routes, and in particular the majority of users agreed that the routes make them feel safer when cycling.



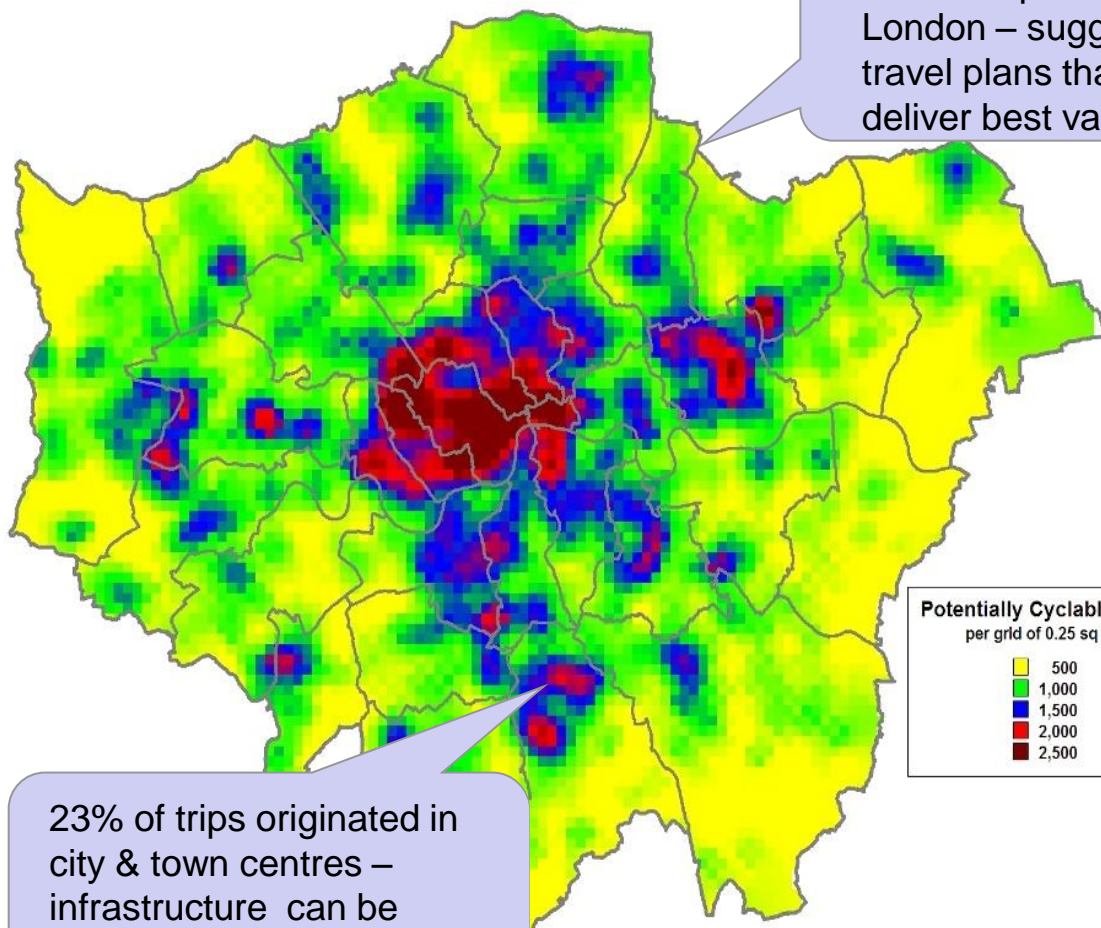
What do we know about encouraging more cycling?

- Potential Market
- Population segments that provide the best opportunity for increasing cycling
- Understanding why people cycle and why they don't
- Cycling Model



Potential Market : TfL has identified 4.3 million trips currently made by car or public transport which *could potentially* be cycled, based on the characteristics of the person and trip

Potentially cyclable trips by origin...



55% of trips are highly dispersed across outer London – suggesting that measures such as school travel plans that can reach a wide audience will deliver best value for money

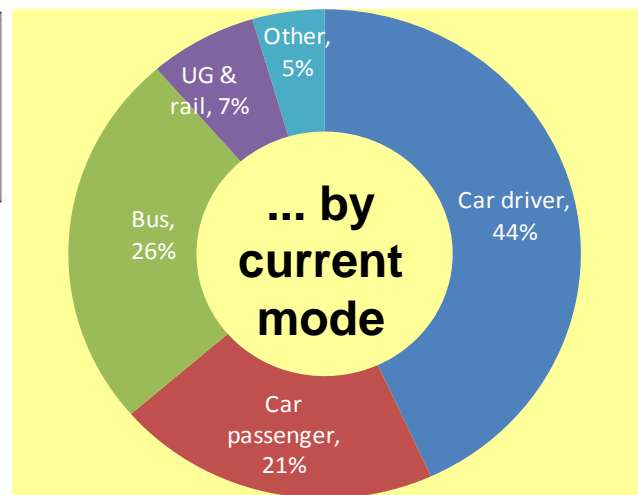
- 2/3 of potentially cyclable trips made by car
- 40% for shopping & leisure, 1/4 for work
- 3.5m trips would take less than 20 minutes to cycle

Potentially Cyclable Trips per grid of 0.25 sq km



Note that sample sizes will be very small for each 'square' so this map should be understood thematically rather than analysed in close detail.

Source: London Travel Demand Survey 2005-8

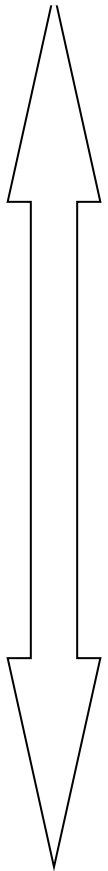


Best Opportunities: Cycling Market Segmentation describes the propensity of Londoners to cycle at present and how amenable they are to cycling in future

Segment	Description	% Londoners
Urban living	Young, well educated, reasonably well-off and usually live in town/city centre. Many choose to live without a car.	23%
Young couples and families	Young, with relatively low car ownership and young children. Often tight finances, ethnic background may present a barrier to cycling.	15%
High earning professional	Well educated, affluent, often working in multinationals. Tend to use personal rather than public transport.	11%
Suburban lifestyle	Average income, heavily reliant on car and living in suburbia. Cycling for leisure is as likely as cycling for purpose.	17%
Hard pressed families	Difficult family finances, and often living in inner city flats and tower blocks. Ethnic background may present a barrier to cycling.	21%
Manual trades	Mainly white with high car ownership, this segment is unlikely to cycle with generally negative attitudes towards cycling.	5%
Comfortable maturity	Older and retired people, reasonably well off, living in suburban areas - some potential for off-road leisure cycling.	8%

Source: Cycling Market Segmentation 2010

Most likely



Least likely

Among the near market the reasons to cycle are consistently expressed, but are often about why people 'should' cycle. Some people express significant barriers to cycle

Result: a set of conflicting attitudes and opinions co-existing in people's minds 'cognitive dissonance' seeking a resolution, which is often the status quo

Why I should cycle

Physical fitness
Dissatisfaction with other modes
Saving money
Family bonding time
Independence and freedom
Getting to know my area better
Healthier lifestyle

Resolution?



Status quo

Why I don't cycle

Inertia
Habit
Lack of confidence
Safety concerns
Self image
Environment
Physical effort
Not fun
Image of cyclists

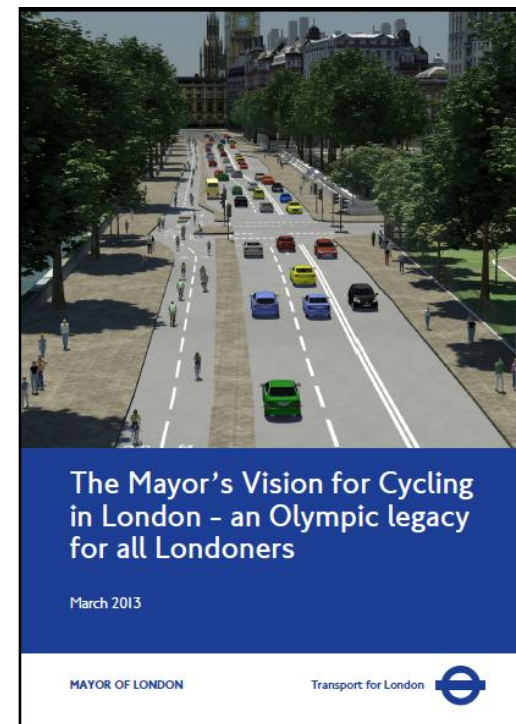
Cycling Behaviour Change Model



The Mayor's Cycling Vision for London

The Mayor's Vision for Cycling aims to achieve four important outcomes:

- **A Tube network for the bike.** London will have a network of direct, joined-up cycle tracks, with many running in parallel with key Underground, rail and bus routes
- **Safer streets for the bike.** Spending on the junction review will be significantly increased and substantial improvements to the worst junctions will be prioritised. With government help, a range of radical measures will improve the safety of cyclists around large vehicles
- **More people travelling by bike.** We will 'normalise' cycling, making it something anyone feels comfortable doing
- **Better places for everyone.** The new bike routes are a step towards the Mayor's vision of a 'village in the city', with more trees, more space for pedestrians and less traffic



A Tube network for the bike – What our research tells us about how this should be developed?

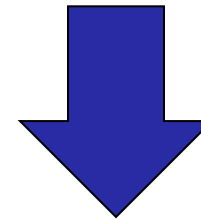
TfL have completed research to understand how cyclists choose their routes which showed that:

- When choosing a route, the key considerations for cyclists are the safety of that route and being able to avoid traffic and difficult junctions
- Cyclists were prepared to travel further to cycle in cycle lanes, bus lanes, on residential roads and in particular would travel 3 times further to cycle off-road
- More confident cyclists and those who cycle most frequently tend to opt for the most direct route
- Cyclists will make significant detours to avoid junctions perceived to be dangerous.

Wayfinding research shows four key principles:

- Cyclists road safety and presence
- Orientation and control over journey
- Monitoring of journey progress
- Safe areas and secure parking facilities

Different types of cyclists have different barriers to cycling and require different types of interventions and schemes to encouraged more cycling.



The Vision includes a range of different types of intervention and this research will inform the development of:

- Remaining Cycle Superhighways
- Quietways
- Central London Cycling Grid
- Crossrail for the bike

Safer streets for the bike

- Danger/ safety is a key barrier to cycling, and is mentioned more by non-cyclists. However, cyclists still mention safety as being a barrier, implying that although there is a perception about danger, it is reflected to some extent in their experience.

As a result of cycle training:

76% felt safer and
73% said cycling was more enjoyable



44% felt more confident

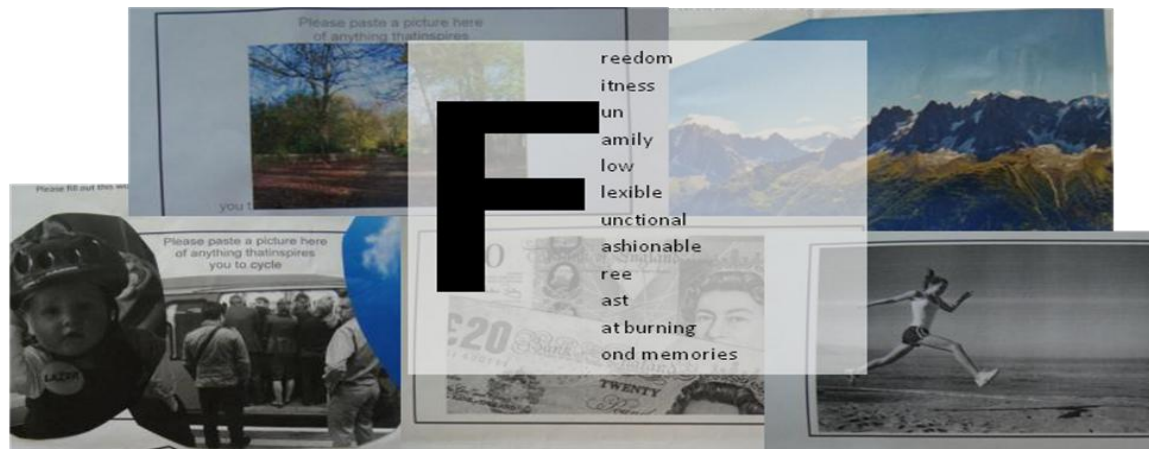
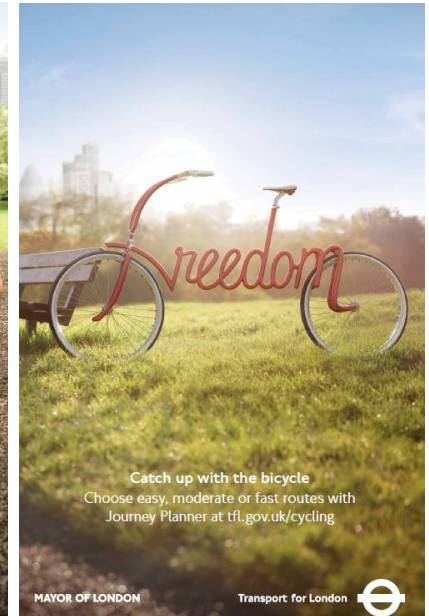
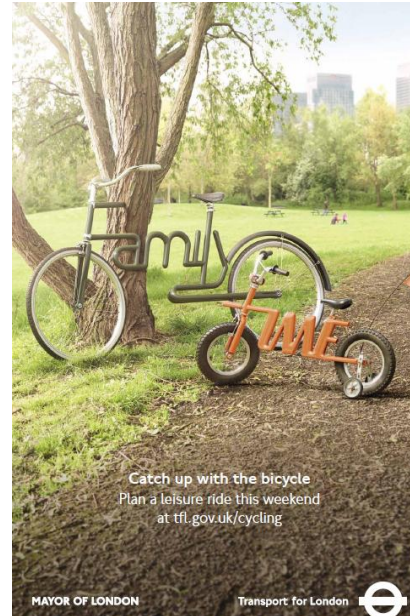
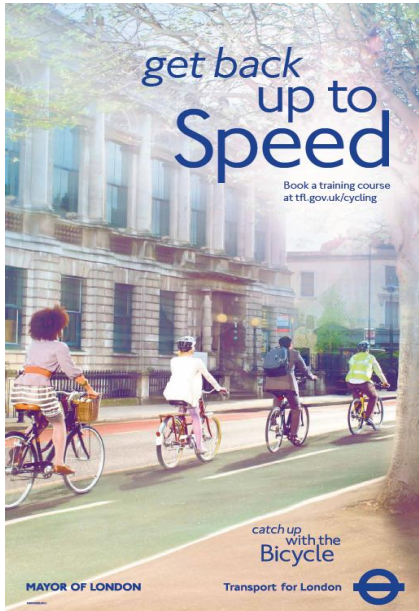
75% of non-cyclists feel concerns of safety is the most deterring factor to take up cycling.

More people travelling by bike

- We will 'normalise' cycling, making it something anyone feels comfortable doing.
- We need to address the practical and emotional barriers.
- Practical barriers include showers, parking, routes that met their needs.
- Our behavioural research suggests that marketing & communications should:
 - Make people **WANT TO** cycle, using the social, personal and environmental motivators and addressing the barriers using emotional hooks & rational direction
 - Show people **HOW TO** get started, in a way that is rendered as easy as possible whilst maintaining realistic and believable occasions that people can project themselves into
 - Cycle safety campaigns are developed to effectively raise **awareness**, improve **attitudes** and positively **change behaviours** to reduce KSI's.
 - They should clearly inform and can use the emotional and rational drivers for change whilst being sensitive and appropriate in tone as to not deter new cyclists



Transformed the cycling marketing campaigns in order to tap into the emotional motivators to cycle



Conclusions and further questions

- A significant amount of research of cyclists and non-cyclists has been completed which has helped TfL to understand the barriers and motivators to cycling.
- There will continue to be monitoring of interventions and research into cycling which will feed into continuous policy development as TfL and the Mayor work towards achieving the vision and continued growth in cycling in London.
- Questions TfL are interested in answering:
 - What gaps are left in our research?
 - How do we increase the number of women cycling?
 - How to we increase cycling amongst those with lower incomes?

