

Attitudes to Cycling 2008

Research Report

Prepared for: Transport for London
Prepared by: Michael Stone / Ruth Gosling –
Synovate
Job number: TfL JN: 05110; Syn. JN: 08-0471
Date: June 2008

CONFIDENTIALITY

Please note that the copyright in the attached report is owned by TfL and the provision of information under Freedom of Information Act does not give the recipient a right to re-use the information in a way that would infringe copyright (for example, by publishing and issuing copies to the public).

Brief extracts of the material may be reproduced under the fair dealing provisions of the Copyright, Designs and Patents Act 1988 for the purposes of research for non-commercial purposes, private study, criticism, review and news reporting.

Details of the arrangements for reusing the material owned by TfL for any other purpose can be obtained by contacting us at enquire@tfl.gov.uk.



1. BACKGROUND	3
1.1 Objectives	3
2. EXECUTIVE SUMMARY	4
2.1 Cycling behaviour.....	4
2.2 Cycle training	4
2.3 Changes in cycle behaviour	5
2.4 Appeal of cycling	5
2.5 Attitudes towards cyclists	6
2.6 Feelings of personal security	6
2.7 <i>Consideration</i> of cycling more	7
2.8 Children.....	7
3. CURRENT SITUATION.....	8
3.1 Frequency of cycling	8
3.2 Profile of cyclists	9
3.3 Number of trips year on year.....	15
3.4 Cycle training	18
4. CHANGES TO CYCLING BEHAVIOUR	22
4.1 Profile of those cycling more/ less than last year	25
5. PERCEPTIONS OF CYCLING	26
5.1 Cycling compared to other modes	26
5.2 Who finds cycling appealing?.....	27
5.3 Attitudes to cycling	28
5.4 Attitudes towards cyclists	30
5.5 Feelings of personal security	32
6. CONSIDERATION OF CYCLING MORE.....	35
7. COMMUNICATIONS	37
7.1 Advertising recall.....	37

7.2	Attending a cycling event in London	37
7.3	Awareness of cycling schemes	38
8.	ADULTS VERSUS CHILDREN	39
8.1	Frequency of cycling for specific journeys	39
8.2	Number of trips summer/ winter	40
8.3	Changes in cycling	40
8.4	Cycle training	40
8.5	Perceptions of cycling	41
8.6	Feelings of personal security	42
8.7	Consideration of cycling more	42
8.8	Advertising recall.....	42
8.9	Events	42
9.	APPENDIX.....	43
9.1	Methodology.....	43



1. Background

A key objective for TfL is to reduce car use in the capital by encouraging a move towards more sustainable transport modes including cycling. This annual study monitors cycling activity and attitudes to cycling in London. This is the fourth year of this research.

Questions were put to 1,002 adult Londoners as part of our Regular Research Slot (effectively omnibus survey) in April 2008. Data is weighted to ensure proportionate representation of Londoners. We also interviewed 50 children (aged 11-16) over two Regular Research Slots, conducted in April and May 2008.

1.1 Objectives

The specific objectives of this research were to:

- Assess current, past and future cycling habits of Londoners
- Understand attitudes towards cycling
- Gauge awareness of communications
- Evaluate if there are any differences between results for adults and children aged 11-16
- Look in depth at the views and experiences of regular cyclists (three times a week or more often), and occasional cyclists (once a month to twice a week)

2. Executive summary

2.1 Cycling behaviour

The 2008 research found, as the 2007 research also had, that one in three of the Londoners to whom we spoke has access to a bicycle in their household and one in six has cycled in the capital in the last year.

Around one in twelve of the Londoners we spoke to (8%) are regular cyclists (defined as cycling at least 3 or 4 times a week), and one in twenty (6%) are occasional cyclists (between once a month and twice a week).

Cyclists in London are more likely to be male, under 55, Inner London residents, in full time employment and ABC1 than the London population as a whole, all of which mirror the 2007 findings.

2.2 Cycle training

Just over a quarter of Londoners (28%) have received some form of cycle training at some point in their life, with just 1% having done so in the past year. This represents no change from 2007 and points to relatively low take up of the various cycle training schemes which are available in London.

The old national Cycling Proficiency Test is easily the most commonly cited means of having received any cycle training.

The proportion of Londoners who told us that they think it is likely that they will undertake cycle training in the next 12 months is 7%. Caution is necessary here, however, as this was also the case last year and, as we have seen, this year's research indicates that only 1% actually did.

2.3 Changes in cycle behaviour

Six in ten people told us that they didn't cycle last year and have not cycled this year. Those cycling more (12%) slightly exceed those cycling less (10%). Two fifths of cyclists, however, told us that they are cycling about the same amount when this year is compared with last.

2.4 Appeal of cycling

In figures which closely mirror those from 2007, walking is easily the most appealing transport mode with the Tube the least. Cycling remains just ahead of the Tube as the next least appealing.

Predictably, regular cyclists (three or more times per week) are most likely to say that cycling is appealing with 89% saying this (54% very and 35% quite). Among occasional cyclists, 70% describe it as appealing (12% very and 58% quite). Interestingly, 39% of people who have never cycled described the mode as appealing (10% very and 29% quite).

Those finding cycling appealing are more likely to be male, from Inner London, to be younger and to be from a BAME group (which contains a higher proportion of young people).

Around nine in ten Londoners agree that 'cycling is a good way to get fit', 'it is important for children to learn to cycle', 'cycling provides good value for money' and 'cycling makes a difference to the environment', demonstrating very high awareness of the key benefits of cycling.

2.5 Attitudes towards cyclists

We found fairly negative reactions towards cyclists, particularly amongst non-cyclists. Over half of Londoners agree that cyclists are 'dangerous', with higher agreement amongst non-cyclists (58% vs. 31% regular cyclists). Two fifths of Londoners believe cyclists to be 'considerate', with significantly lower agreement amongst non-cyclists (36% vs. 61% regular cyclists).

Just a third of Londoners agree that cyclists are 'law abiding', with no significant difference between cyclists and non-cyclists. Perhaps unsurprisingly, cyclists (and regular cyclists in particular) are more likely than non-cyclists to feel that cyclists are like them (49% of regular cyclists vs. 29% of non-cyclists). Men are more likely than women to identify with cyclists (37% vs. 25% agreeing that cyclists are like them), perhaps reflecting the fact that cyclists are more likely to be male.

It is interesting to note that even among regular cyclists (three times a week or more), 36% disagree that cyclists are law abiding, 16% disagree that cyclists are considerate and 31% agree that cyclists are dangerous. 28% of this group disagree that cyclists are like them.

2.6 Feelings of personal security

Just over half of Londoners (55%) consider that they would be safe from antisocial behaviour or crime when cycling in London. This is a significant increase from last year (49%), back to the level measured in 2006 (55%). Feelings of personal security drop at night when just a fifth (22%) think they would feel safe, unchanged since last year. Cyclists are still significantly more likely to consider cycling safer during both the daytime and at night than non-cyclists.

Three quarters of cyclists (76%) said that they feel safe in respect of the traffic they encounter on quiet roads, whereas only a quarter (27%) feel safe in this regard on busy roads. Women were significantly less likely than men to say that they feel safe on busy roads (13% vs. 35%), with no significant difference on quiet roads.

2.7 Consideration of cycling more

Around a third of Londoners would *consider* cycling more over the next year. This increased significantly from 2006 to 2007 (32% to 37%), but has remained stable in 2008 (38%). Three quarters (74%) of those already cycling in London would *consider* cycling more, compared with a third (31%) of non-cyclists.

2.8 Children

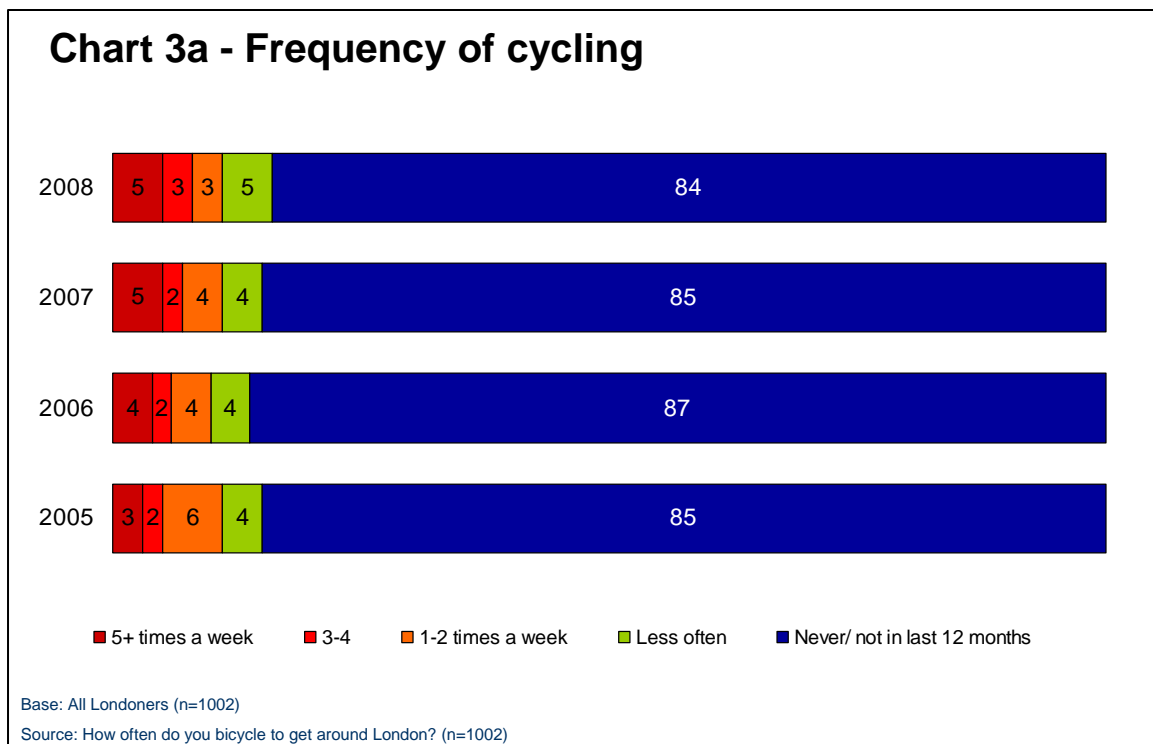
This year, as last, children were far more likely than their parents to cycle, to have had cycling training, to feel positively disposed towards cycling and to be willing to consider cycling more.

3. Current situation

3.1 Frequency of cycling

We found this year that 35% of the Londoners to whom we spoke has access to a bicycle in their household and 16% have cycled in the capital in the last year, the latter showing a slight, though not significant, increase from 15% last year.

The frequency with which the people to whom we spoke cycle has altered little over the last year with one in twenty telling us that they do so five or more times per week and 17 in 20 telling us that they never do so or, at least, have not done so in the last year.



Around one in twelve of the Londoners we spoke to (8%) are regular cyclists (defined as cycling at least 3 or 4 times a week), and one in twenty (6%) are occasional cyclists (between once a month and twice a week).

3.2 Profile of cyclists

The table below shows the profile of those who cycle at least once a week compared with the total population of those we spoke to.

%	Total	2008	2007	2006	2005	Total	2008	2007	2006	2005
Base	1002	108	149	99	116	1002	108	149	99	116
Gender						Ethnicity				
Male	49	61	67	77	66	White	69	71	85	80
Female	51	39	33	23	34	BAME	26	24	12	17
Age						Working				
16-34	39	43	24	42	44	Full time	48	62	54	60
35-54	35	38	45	45	42	Part time	12	10	18	15
55+	26	19	20	10	13	Not working	38	25	26	23
London Boroughs						Social grade				
Inner	39	43	55	44	38	ABC1	63	69	69	72
Outer	61	57	45	56	64	C2DE	28	18	25	21

Cyclists in London are more likely to be male, under 55, Inner London residents, in full time employment and ABC1 than the population as a whole.

Statistically significant differences between the 2008 figures and the London population as a whole are highlighted in bold.

Profile of regular cyclists

The following table shows the profile of regular cyclists (three times a week or more) compared with all Londoners.

Table 3c - Profile of regular cyclists versus London population as a whole						
	%	Total	2008		Total	2008
Base		1002	80		1002	80
Gender				Ethnicity		
Male	49		68	White	69	74
Female	51		33	BAME	26	21
Age				Working		
16-34	39		43	Full time	48	56
35-54	35		35	Part time	12	13
55+	26		23	Not working	38	30
London Boroughs				Social grade		
Inner	39		41	ABC1	63	66
Outer	61		59	C2DE	28	21

The table above compares regular cyclists with Londoners as a whole. Regular cyclists are even more likely to be male and ABC1 than the once a week cyclists profiled on the previous page.

Statistically significant differences between the 2008 figures and the London population as a whole are highlighted in bold.

Profile of occasional cyclists

The table below compares occasional cyclists (once a month to two days a week) with Londoners overall. It is important to bear in mind the small base size for occasional cyclists.

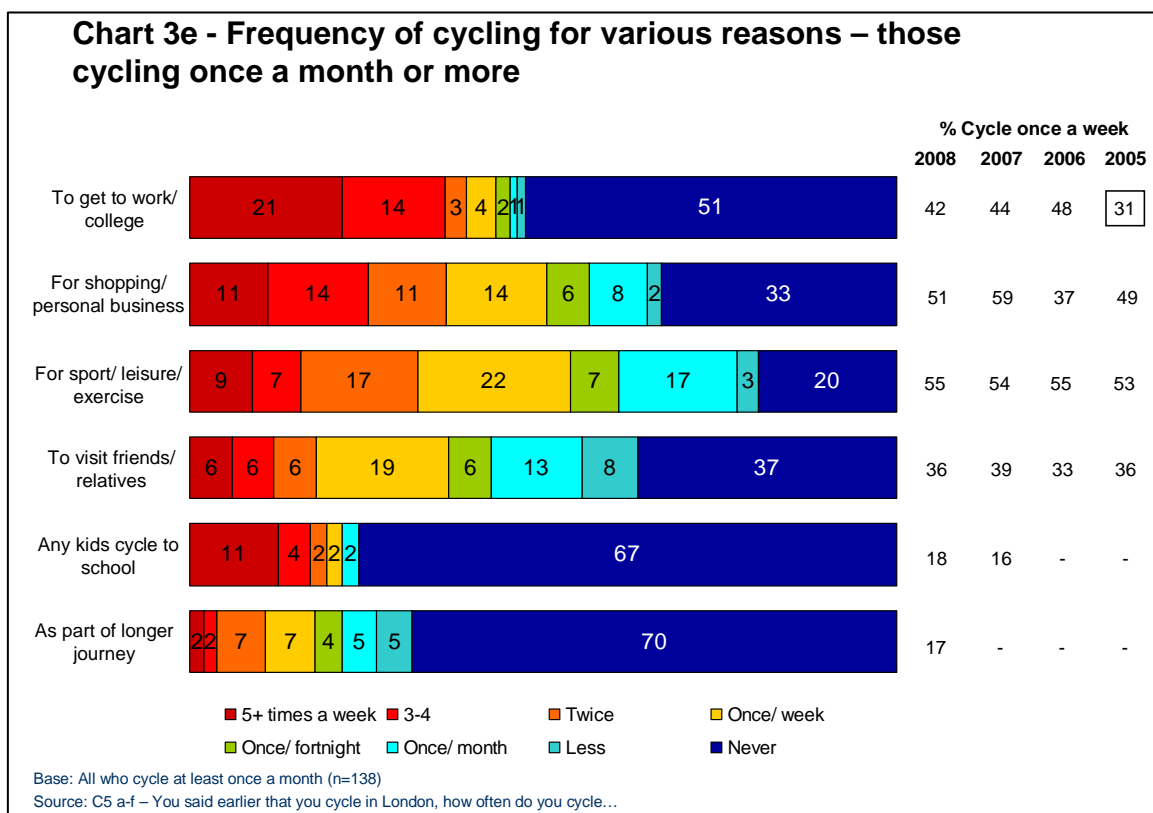
Table 3d - Profile of occasional cyclists versus London population as a whole						
	%	Total	2008		Total	2008
Base		1002	58		1002	58
Gender				Ethnicity		
Male	49		60	White	69	71
Female	51		43	BAME	26	26
Age				Working		
16-34	39		43	Full time	48	69
35-54	35		38	Part time	12	12
55+	26		17	Not working	38	17
London Boroughs				Social grade		
Inner	39		48	ABC1	63	81
Outer	61		52	C2DE	28	16

The profile of occasional cyclists contains a higher proportion of ABC1's and people in full time employment than the London cycling population as a whole, but is otherwise similar.

Statistically significant differences between the 2008 figures and the London population as a whole are highlighted in bold.

Frequency of cycling for specific journeys

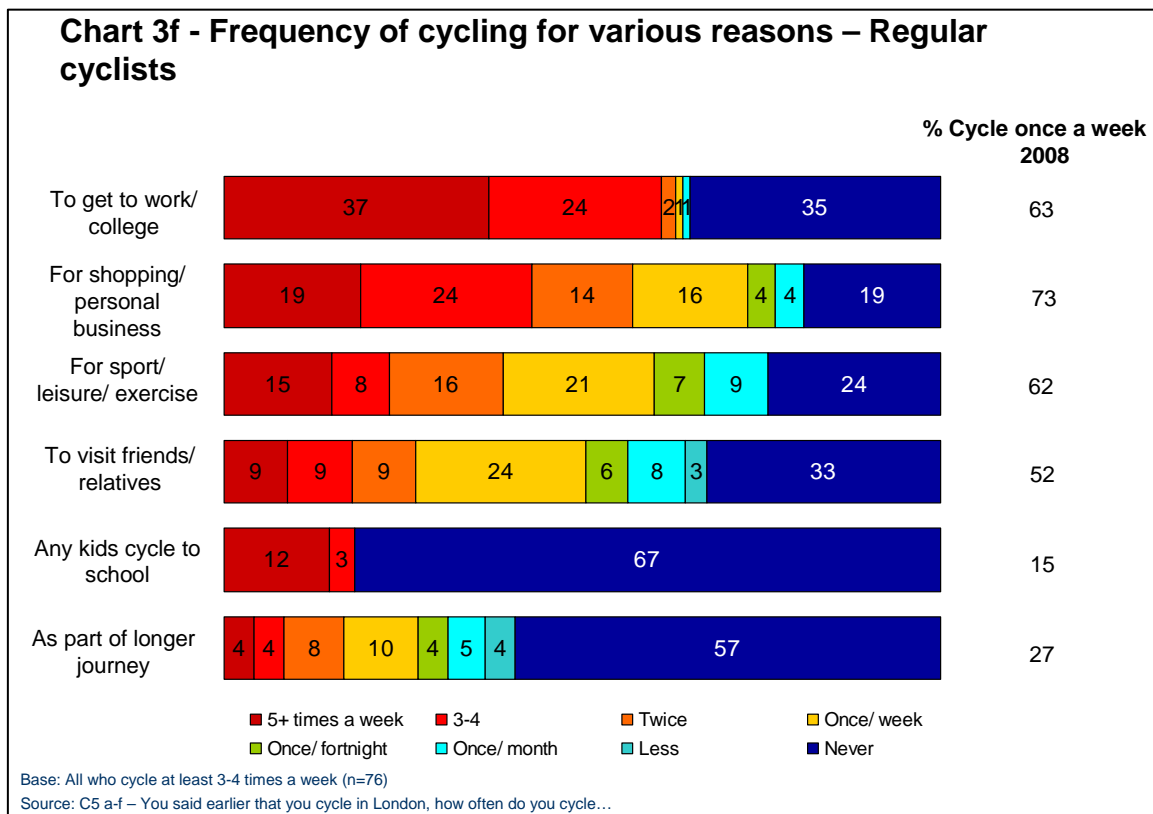
Cyclists were then asked how frequently, if at all, they cycled for a variety of different journeys. Chart 3e below shows the frequency of each journey type amongst those cycling at least once a month.



The types of journey most likely to be made by those cycling at least once a month were for leisure or exercise (around 8 in 10), or for shopping or personal business (around two thirds). These were also the types of journey most likely to be made at least once a week, with around half doing so.

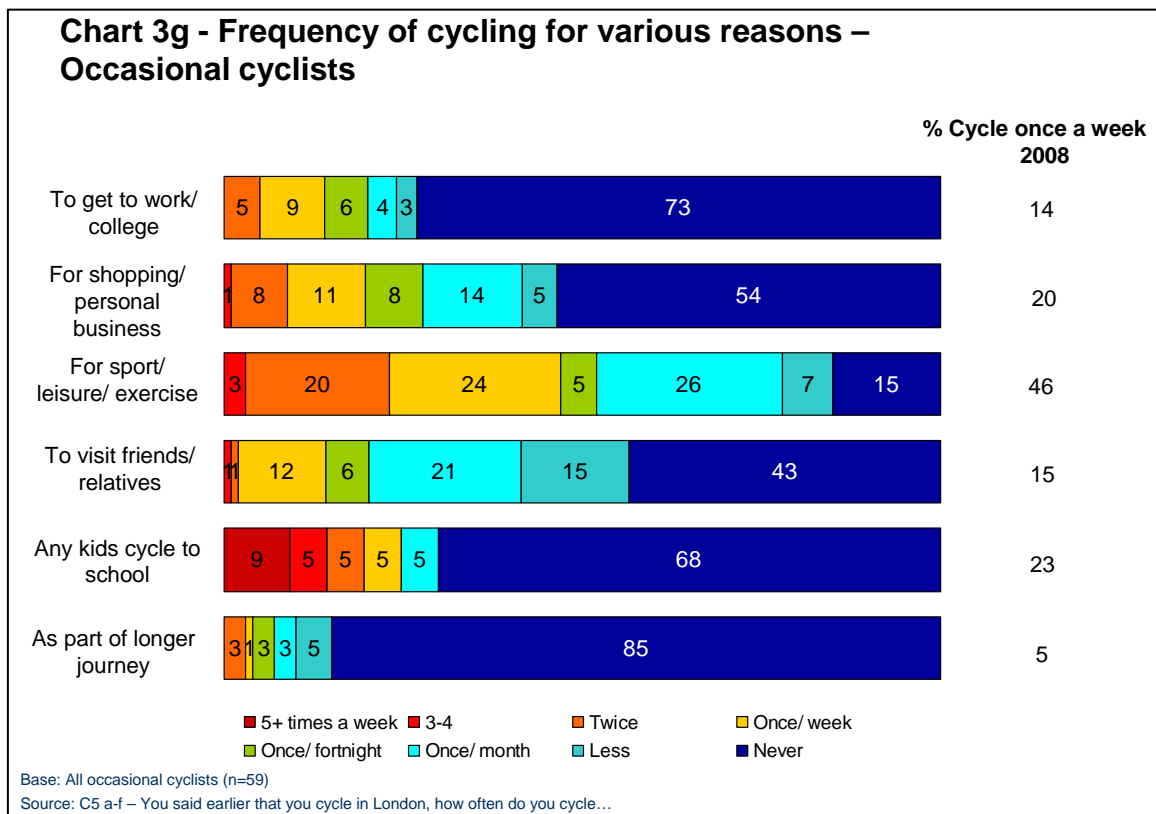
The least frequent journey type is cycling as part of a longer journey, with only around one in six doing so at least once a week. Around two fifths commute by bike at least once a week, remaining significantly higher than in 2005.

The frequency of journey types amongst regular cyclists.



The most common journey type amongst regular cyclists (three times a week or more) is for shopping or personal business, with around three quarters doing so at least once a week, a slight decrease from 2007 (79% to 73%). Around six in ten travelled by bike or cycled for sport or leisure, an increase from 2007 when it was just over five in 10. There has also been a slight reduction in the proportions of regular cyclists cycling to work/school or college at least once a week (from 67% in 2007 to 63% in 2008).

The frequency of journey types amongst occasional cyclists.



Just under half of those cycling occasionally do so for sport or leisure at least once a week, a reduction from 2007 when it was just under six in ten. There was also a further reduction in the proportion of those who cycle for shopping or personal business at least once a week over the year from just under four in ten to two in ten occasional cyclists. This group were least likely to cycle as part of a longer journey, with fifteen per cent ever doing so and 5% doing so once a week or more.

3.3 Number of trips year on year

Cyclists were asked how many trips they took by bike in a typical week. The results are shown below and on the following pages amongst all those cycling once a month or more, regular cyclists (three times a week or more) and occasional cyclists (once a month to two days a week). As may be expected, the average number of trips is less in the winter months than during the summer.

Amongst those defining themselves as, on average, cycling once a month or more, around one in ten do not make any trips in the winter, and whilst around two thirds make at least four trips a week in the summer, this drops to around two fifths during the winter.

There has been a far greater variation over the years in summer cycling as opposed to winter cycling. This almost certainly reflects the variable length and quality of recent summers.

Table 3h: No. of trips – those cycling once a month or more

No. of trips	Summer	Winter
None	3%	11%
1-3	23%	42%
4-10	36%	20%
11-20	11%	10%
21+	17%	9%
Don't know	10%	9%
Mean 2008	9.1	5.6
Mean 2007	8.6	5.9
Mean 2006	9.9	5.4
Mean 2005	7.5	5.4

Amongst regular cyclists (three times a week or more often), around three fifths make at least four trips a week in the winter, rising to 82% in the summer. This represents a slight increase since last year in the mean number of trips per week in the summer from 12.4 in 2007 to 12.7 in 2008, and a slight decrease in the mean number of trips per week during the winter from 9.8 in 2007 to 8.8 in 2008.

Table 3i: No of trips – regular cyclists

No. of trips	Summer	Winter
None	1%	6%
1-3	12%	26%
4-10	39%	30%
11-20	20%	16%
21+	23%	12%
Don't know	5%	7%
Mean 2008	12.7	8.8

Amongst occasional cyclists (once a month to two days a week), four in ten cycle at least four times a week in the summer, dropping to one in ten in the winter. This represents an increase in the mean number of trips per week in the summer from 4.7 in 2007 to 5.5 in 2008, and a further increase in the mean number of trips in the winter from 1.6 in 2007 to 2.4 in 2008.

Table 3j: No of trips – occasional cyclists

No. of trips	Summer	Winter
None	5%	17%
1-3	37%	63%
4-10	32%	5%
11-20	-	2%
21+	8%	3%
Don't know	17%	10%
Mean 2008	5.5	2.4

3.4 Cycle training

Just over a quarter of Londoners (28%) have received some form of cycle training at some point in their life, with just 1% having done so in the past year. This represents no change from 2007 and points to relatively low take up of the various cycle training schemes which are available in London.

Current cyclists are more likely to have received cycle training than non-cyclists, however the majority (59%) have still not received any cycle training.

Table 3k – Whether ever had cycling training

	Cyclists	Non-cyclists
Yes	40%	26%
No	59%	74%

Among regular cyclists (three times a week or more often) 5% have attended cycle training in the last year with a further 35% having done so at some point in their lives. Among occasional cyclists (twice a week to once a month) 7% have attended cycle training in the last year and a further 40% have received such training at some point in their lives.

The table below shows the types of cycle training received by those who reported that they have received some at some point in their lives.

As can be seen, the old national Cycling Proficiency Test is easily the most commonly cited means of having received any cycle training, this being reported by half those who said they have had some form of training, translating to one in seven of all the people to whom we spoke.

Table 3I – Types of cycling training received

	Received training	Total sample
1:1 training session	5%	1%
1:1 training multiple session	4%	1%
Group training session with other adults	7%	2%
Training with family groups	2%	1%
Old national Cycling Proficiency Test	49%	14%
Cycling Proficiency training	6%	2%
School training	7%	2%
Other	8%	2%
Don't know/can't remember	12%	3%

Of the 14 people we spoke to who told us that they have had cycling training in the last 12 months, 10 reported that they are now cycling neither more nor less than prior to the training and 10 reported that they have felt neither more nor less safe on London's roads since.

The proportion of Londoners who told us that they think it is likely that they will undertake cycle training in the next 12 months is 7%. Caution is necessary here, however, as this was also the case last year and, as we have seen, this year's research indicates that only 1% actually did.

Among regular cyclists (three times a week or more), 8% think it likely that they will undertake cycling training in the next year whilst this is true for 1% of occasional cyclists (twice a week to once a month).

Londoners were also asked if other members of their household had received cycling training through local schools. Less than one in five (17%) said that they had. Though this is more likely to be the case for people who themselves are cyclists, the difference shown below does not calculate to be significant statistically.

Table 3m – Other members of household had cycling training

	Cyclists	Non-cyclists
Yes	23%	16%
No	75%	82%

18% of regular cyclists (three times or more per week) and 30% of occasional cyclists (twice a week to once a month) told us that someone else in their household has attended cycle training through local schools.

A quarter of Londoners (26%) said they were aware that free cycle training is available to children through all the London boroughs, and that free or subsidised cycle training is also available to adults. The difference shown below between cyclists and non-cyclists in their awareness levels is not significant.

Table 3n – Awareness of free cycling training

	Cyclists	Non-cyclists
Yes	22%	27%
No	78%	72%

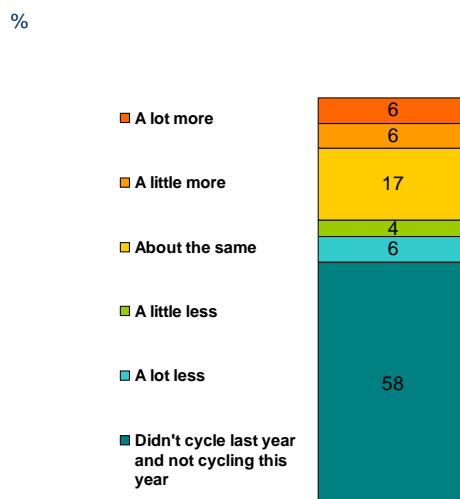
Awareness levels among regular cyclists (three or more times per week) and occasional cyclists (twice a week to once a month) vary only marginally from the overall at 23% and 21% respectively.

Those not previously aware of the free training were asked, in light of this new information, how likely they are to undertake cycling training in the next year. A fifth (18%) said that they were likely to do so (5% very likely and 13% quite likely). This is true of 17% of non-cyclists (9% very likely and 11% quite likely). Among regular cyclists (three or more times per week) 20% thought it likely that they would do this (4% very likely and 13% quite likely) as did 14% of occasional (twice a week to once a month) cyclists (4% very likely and 10% quite likely). Though this clearly suggests a greater take-up of cycle training if there were greater awareness of free and subsidised training, considerable caution is necessary when looking at the proportions saying they are likely to take up cycle training as, year on year, the proportions saying it is likely that they will do so in the year ahead always very greatly exceeds the proportion who a year later tell us that they have.

4. Changes to cycling behaviour

Londoners were asked how much they cycle in comparison to last year.

Chart 4a - Cycling habits – current vs. previous year



Base: All respondents (n=1002)
Source: C9 – How do you think the amount you cycle in London is compared to this time last year?

Six in ten people told us that they didn't cycle last year and have not cycled this year. Those cycling more (12%) slightly exceed those cycling less (10%). Two fifths of cyclists, however, told us that they are cycling about the same amount when this year is compared with last.

Among regular cyclists (three times a week or more often), 27% told us that they are cycling a lot more than last year and 13% told us that they are cycling a little more, only 5% of this group are cycling less.

Among occasional cyclists (twice a week to once a month), 12% told us that they are cycling a lot more than last year and 25% told us that they are cycling a little more. However, among this group, 25% told us that they are cycling less this year.

The main reasons for cycling more are the same as in 2007 – i.e. to *get fit* (30%), to *save money* (10%) and to *save time* (7%). Only a small minority mentioned the environment (3%) good weather (1%), and congestion levels/ charge (1%).

The main reasons given for cycling less are that it is too dangerous, no longer having access to a bike (both 15%), and due to health reasons (13%).

The 13 people who mentioned the dangers of cycling as a reason for cycling less were asked why they felt it to be dangerous. The main reasons were due to the traffic conditions being too busy (6 people) or not knowing a safe route (3 people).

Those having changed their cycling activity were then asked what types of journeys they have been doing more or less of.

Table 4b – Types of journey doing more/ less

Journey type	Cycling more	Cycling less
Sport/ leisure	52%	51%
Shopping/ personal	31%	36%
Work/ college	29%	45%
Friends/ family	26%	39%

As can be seen, cycling for sport/leisure is, as it was in 2007, both the journey type being undertaken *more* and *less*. Those cycling less for commuting and to visit friends/family significantly exceed those cycling more for these purposes.

The main reason given for cycling the same amount was simply that 'my lifestyle has not changed'.

4.1 Profile of those cycling more/ less than last year

Younger people, BAME people, those residing in Inner London and those working full time are more likely to be cycling more than a year ago, as can be seen below.

Table 4c – Profile of those cycling more/ less

%	Total	More	Less		Total	More	Less
Base	1002	125	102		1002	125	102
Gender				Ethnicity			
Male	49	54	56	White	69	60	51
Female	51	47	44	BAME	26	36	44
Age				Working			
16-34	39	54	48	Full time	48	58	49
35-54	35	38	38	Part time	12	15	19
55+	26	9	15	Not working	38	26	27
London Borough				Social grade			
Inner	39	45	42	ABC1	63	58	68
Outer	61	56	56	C2DE	28	25	25

None of the differences in proportions answering 'more' or 'less' calculate to be statistically significant.

5. Perceptions of cycling

5.1 Cycling compared to other modes

Londoners were asked to rate how appealing they thought a number of different modes of transport in London are.

Table 5a – Appeal of different transport modes

	Walking	Car	Train	Bus	Tube	Cycling
Appealing	86%	55%	61%	51%	42%	46%
Unappealing	9%	30%	21%	33%	41%	39%
Mean 2008	4.2	3.4	3.5	3.2	2.9	3.0
Mean 2007	4.1	3.4	3.5	3.2	2.9	3.0
Mean 2006	4.1	3.4	3.5	3.3	3.0	2.8
Mean 2005	4.2	3.8	3.5	3.4	3.5	3.1

In figures which closely mirror those from 2007, walking is easily the most appealing transport mode with the Tube the least. Cycling remains just ahead of the Tube as the next least appealing.

Predictably, regular cyclists (three or more times per week) are most likely to say that cycling is appealing with 89% saying this (54% very and 35% quite). Among occasional cyclists, 70% describe it as appealing (12% very and 58% quite). Interestingly, 39% of people who have never cycled described the mode as appealing (10% very and 29% quite).

5.2 Who finds cycling appealing?

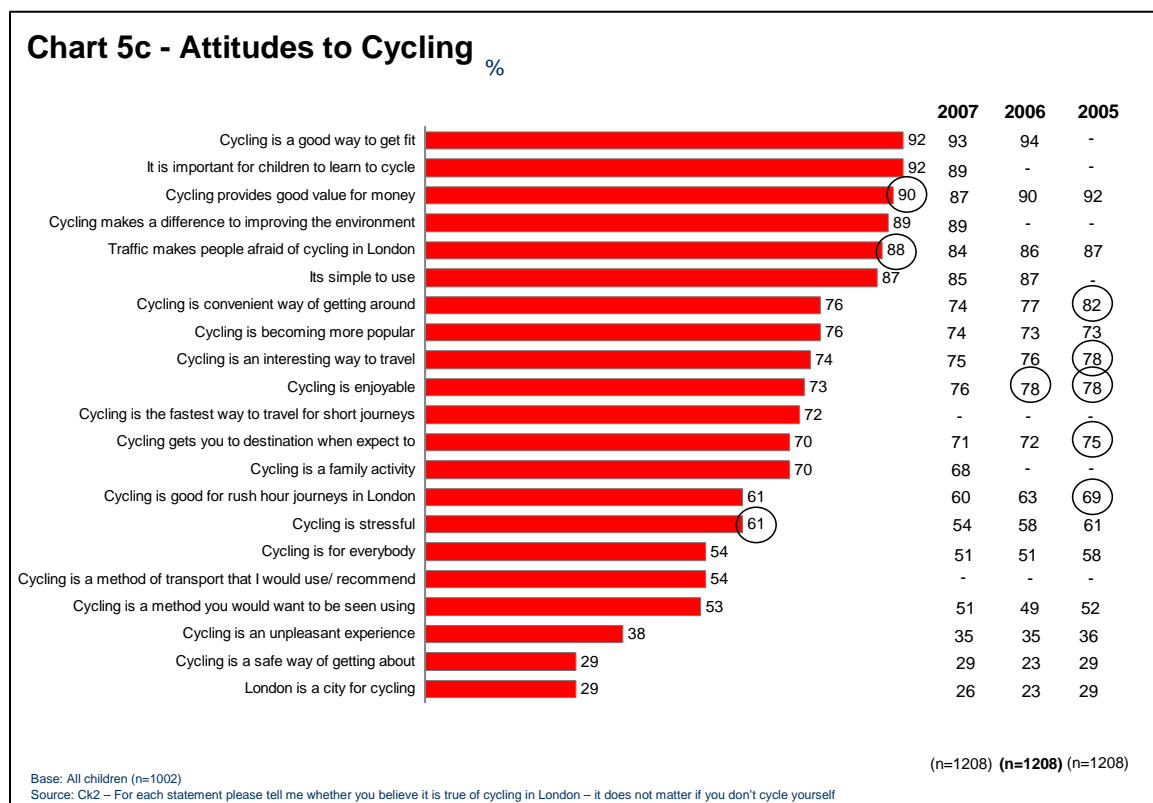
Table 5b – Profile of those finding cycling appealing/ unappealing

	Appealing	Unappealing
<i>Base</i>	459	392
Cyclist		
Cyclists	28%	4%
Non-cyclists	72%	96%
Gender		
Male	53%	45%
Female	47%	55%
Age		
16-34	44%	36%
35-54	36%	34%
55+	20%	30%
Ethnicity		
White	66%	73%
BAME	28%	22%
Social grade		
ABC1	60%	70%
C2DE	30%	24%
Borough		
Inner London	43%	35%
Outer London	57%	65%

Unsurprisingly, non-cyclists are far more likely than cyclists to find cycling unappealing. Those finding cycling appealing are more likely to be male, from Inner London, to be younger and to be from a BAME group (which contains a higher proportion of young people).

5.3 Attitudes to cycling

Londoners were asked which of a number of statements about cycling they felt applied to cycling in London.



Around nine in ten Londoners agree that 'cycling is a good way to get fit', 'it is important for children to learn to cycle', 'cycling provides good value for money' and 'cycling makes a difference to the environment', demonstrating very high awareness of the key benefits of cycling.



However, there are also some clear barriers to cycling. Almost nine in ten agree that *'traffic makes people afraid of cycling in London'* and six in ten agree that *'cycling is stressful'*. Agreement with both of these statements has increased significantly since 2007, returning to 2005 levels. A further barrier to cycling may be the low agreement that cycling in London is *'a safe way of getting about'*, with three in ten agreeing. There has not been a significant variation in the proportion expressing this view over the four years of the survey.

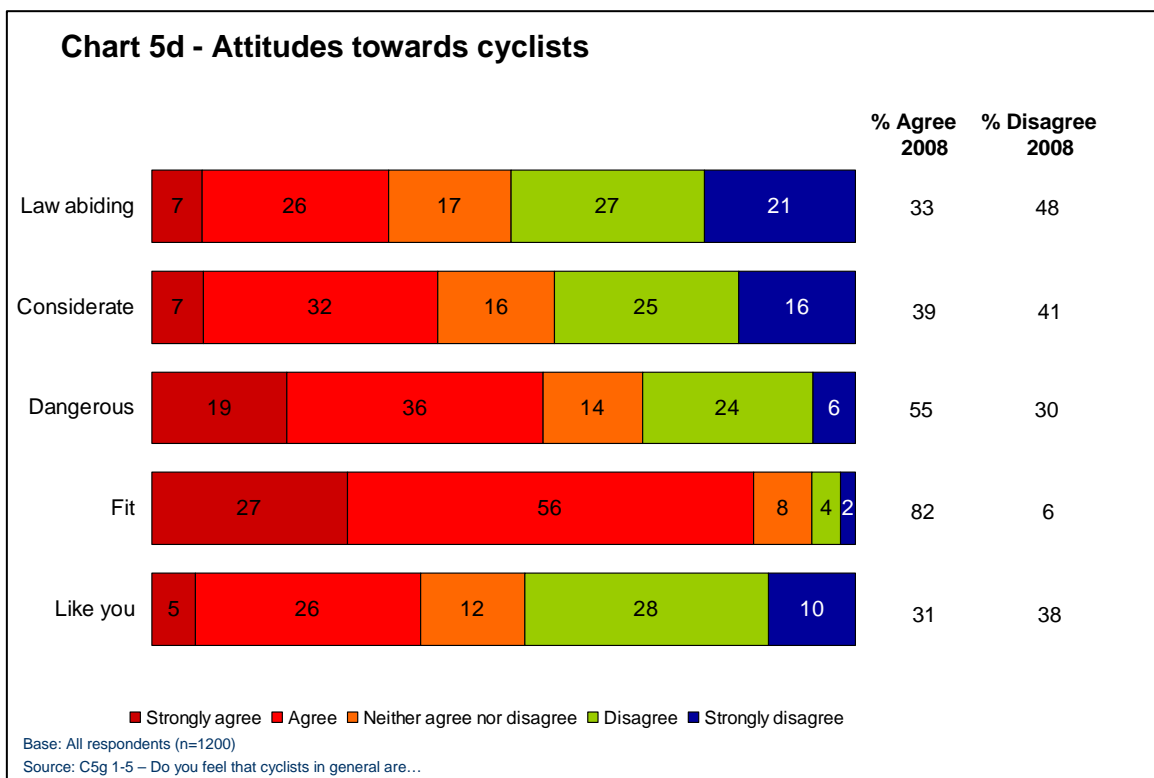
Mirroring the previous surveys, there is a lower agreement level with statements concerning the convenience and reliability of cycling such as *'cycling is convenient'*, *'cycling gets you to your destination when you expect to'* and *'cycling is good for rush hours'* and these have all decreased since 2005. It is noticeable that, as in previous years, three in four people believe that *'cycling is becoming more popular'*.

Two new statements were added in 2008 – around seven in ten agree with the new statement *'cycling is the fastest way to travel for short journeys'*, and around half that *'cycling is a method of transport I would recommend'*.

Unsurprisingly, cyclists (and regular cyclists in particular) are generally more positive in their attitudes towards cycling than non-cyclists. Cyclists are significantly more likely to agree that *'it's important for children to learn to cycle'* (99%), and *'cycling provides good value for money'* (96%). Regular cyclists (three times a week or more) are more likely to agree that *'cycling is a good way to get fit'* (98% an increase from 94% in 2007), *'a convenient way of getting about'* (97% stable from the 96% in 2007), *'an interesting way to travel'* (94% an increase from 91% in 2007), *'enjoyable'* (90% a decrease from the 92% in 2007) and *'the fastest way to travel for short journeys'* (95%). On the other hand, those who never cycle are more likely to agree that *'cycling is stressful'* (64% an increase from 55% in 2007) or *'unpleasant'* (40% an increase from 37% in 2007).

5.4 Attitudes towards cyclists

A new question was included in 2008 to explore attitudes towards cyclists, as shown below.



Agreement levels are highest for the statement that cyclists are 'fit', with eight in ten Londoners agreeing. There are no differences in agreement between cyclists and non-cyclists for this statement.

The other statements suggest fairly negative reactions towards cyclists, particularly amongst non-cyclists. Over half of Londoners agree that cyclists are 'dangerous', with higher agreement amongst non-cyclists (58% vs. 31% regular cyclists). Two fifths of Londoners believe cyclists to be 'considerate', with significantly lower agreement amongst non-cyclists (36% vs. 61% regular cyclists).

Just a third of Londoners agree that cyclists are 'law abiding', with no significant difference between cyclists and non-cyclists. Perhaps unsurprisingly, cyclists (and regular cyclists in particular) are more likely than non-cyclists to feel that cyclists are like them (49% of regular cyclists vs. 29% of non-cyclists). Men are more likely than women to identify with cyclists (37% vs. 25% agreeing that cyclists are like them), perhaps reflecting the fact that cyclists are more likely to be male.

It is interesting to note that even among regular cyclists, 36% disagree that cyclists are law abiding, 16% disagree that cyclists are considerate and 31% agree that cyclists are dangerous. 28% of this group disagree that cyclists are like them.

5.5 Feelings of personal security

Just over half of Londoners (55%) consider that they would be safe from antisocial behaviour or crime when cycling in London. This is a significant increase from last year (49%), back to the level measured in 2006 (55%). Feelings of personal security drop at night when just a fifth (22%) think they would feel safe, unchanged since last year. Cyclists are still significantly more likely to consider cycling safer during both the daytime and at night than non-cyclists.

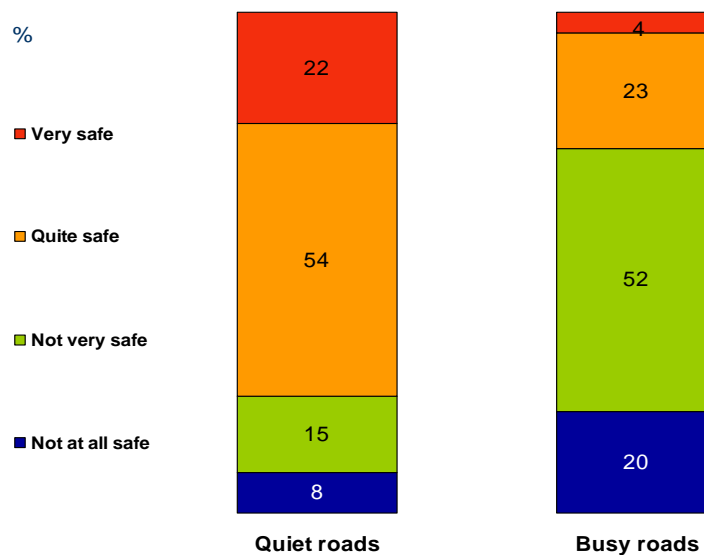
Among regular cyclists (three times a week or more often) 81% feel safe from crime or antisocial behaviour whilst travelling during the day, whilst 18% feel unsafe. Among occasional cyclists (once a month to twice a week) 74% feel safe from crime or antisocial behaviour whilst travelling during the day, whilst 23% feel unsafe.

Even among regular and occasional cyclists, perceived safety levels drop markedly at night. Among regular cyclists (three times a week or more often), there is a fairly even split with 47% feeling safe from crime or antisocial behaviour whilst travelling at night, whilst 50% feel unsafe. Among occasional cyclists (once a month to twice a week) 43% feel safe from crime or antisocial behaviour whilst travelling at night, whilst 57% feel unsafe.

Three quarters of cyclists (76%) said that they feel safe in respect of the traffic they encounter on quiet roads, whereas only a quarter (27%) feel safe in this regard on busy roads. Women were significantly less likely than men to say that they feel safe on busy roads (13% vs. 35%), with no significant difference on quiet roads.

Among regular cyclists (three times a week or more often) 73% feel safe in respect of the traffic they encounter on quiet roads, whilst only 30% feel this way on busy roads. Among occasional cyclists (twice a week to once a month) the comparable figures are 76% and 28%.

Chart 5e - Feelings of safety – quiet vs. busy roads



Base: All who have cycled in the last 12 months (n=1482)
Source: C13d/C13e – In respect of the traffic you encounter on quiet / busy roads, would you say you feel...?



synovate

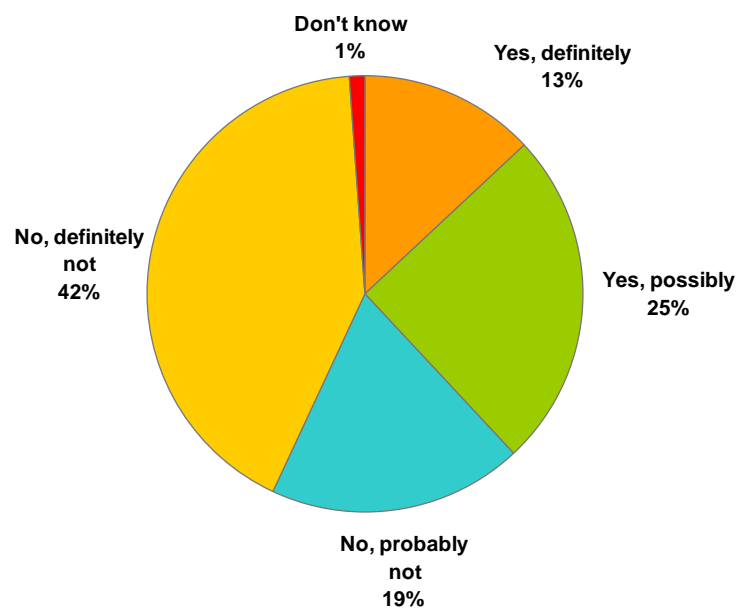
Research reinvented

Around half of cyclists (46%) said that they change their cycling route if cycling after dark. Women are more likely than men to change their cycling route (60% vs. 38%) and are also more likely to say that they do not cycle after dark (21% vs. 6%). Among regular cyclists (three times a week or more often) 39% change their cycling route if cycling after dark, this being true of 55% of occasional cyclists (twice a week to once a month).

6. Consideration of cycling more

Around a third of Londoners would *consider* cycling more over the next year as shown in the chart below.

Chart 6a - Likelihood to *consider* cycling more in London over next year



Base: All respondents (n=1002)
Source: C7a – would you consider cycling more in London over the next year?

This increased significantly from 2006 to 2007 (32% to 37%), but has remained stable in 2008 (38%). Three quarters (74%) of those already cycling in London would *consider* cycling more, compared with a third (31%) of non-cyclists.

Those more likely to *consider* cycling (more) are male (45% vs. 32% female) and under 45 (47% vs. 24%).

Among regular cyclists (three times a week or more often) 68% think it likely that they will *consider* cycling more (36% definitely and 32% possibly). Among occasional cyclists (twice a week to once a month) 74% think it likely that they will *consider* cycling more (20% definitely and 54% possibly).

Amongst those not *considering* cycling more in the next year, the main reason given relates to safety or risk of accident (37%). Other reasons were being too old (13%), which was significantly more likely to be mentioned by over 55s (25% vs. 1% of under 55s), traffic (12%) and health or mobility reasons (10%).

The main reason people are *considering* cycling more is for fitness (28%) – this is perhaps not surprising as this was the statement with the highest level of agreement (i.e. 'cycling is a good way to keep fit'). Other reasons mentioned by around one in ten include environmental concerns (13%), saving money (10%) and saving time (9%).

Bus (47%) and car (30%) are the most popular modes to be replaced by more cycling suggesting that increased cycling would help congestion levels. Around a quarter would replace Tube journeys and around one in ten would cycle rather than get the train.

7. Communications

7.1 Advertising recall

We asked Londoners to tell us of any cycling related advertising or messages they can recall seeing recently. Three quarters of the people we spoke to (73%) could not recall any, very much mirroring the 2007 study. This is true of 63% of regular (three or more times per week) cyclists and of 47% of occasional (twice a week to once a month) cyclists. Again mirroring last year, the answers given by those who could recall something were many and varied. Those mentioned by 2% or more are shown below.

- Encouraging people to use bikes/ cycle 7%
- About safety/ wear a helmet 5%
- Saw/ heard on TV 5%
- Billboard/ poster 3%
- Article/ message in newspaper 3%
- Message about environment 3%
- Advert on public transport 2%
- Message about health 2%
- About cycle lanes 2%
- About cycling in London 2%
- On the news 2%

7.2 Attending a cycling event in London

Around one in twenty Londoners (4%) has attended a London cycling event in the last 12 months. This was higher amongst cyclists than non-cyclists (9% vs. 3%). Among regular cyclists (three or more times per week) 10% had attended one or more event, this being true of 9% of occasional cyclists (twice a week to once a month). Amongst the 40 Londoners to whom we spoke who had attended an event, two fifths mentioned the Tour de France. No other event was mentioned by more than three people.

7.3 Awareness of cycling schemes

Around a quarter of Londoners (23%) said they were aware of schemes promoting cycling in schools, clubs or their workplace. Awareness was higher amongst cyclists (36%) than non-cyclists (21%). This was true for 37% of regular cyclists (three or more times per week) and 38% of occasional cyclists (twice a week to once a month).

The specific schemes mentioned unprompted by 1% of the people we interviewed are shown below as a percentage of those who told us that they were aware of one or more schemes.

● School sports partnerships	9%
● Workplace travel planning	7%
● Buy a bike through work scheme	6%
● Cycling proficiency training/test	6%
● Discounted/subsidised cycling equipment	4%
● Safe routes to schools	4%
● Cycle to Work Scheme	3%
● Travel planning in schools	2%
● School training	2%

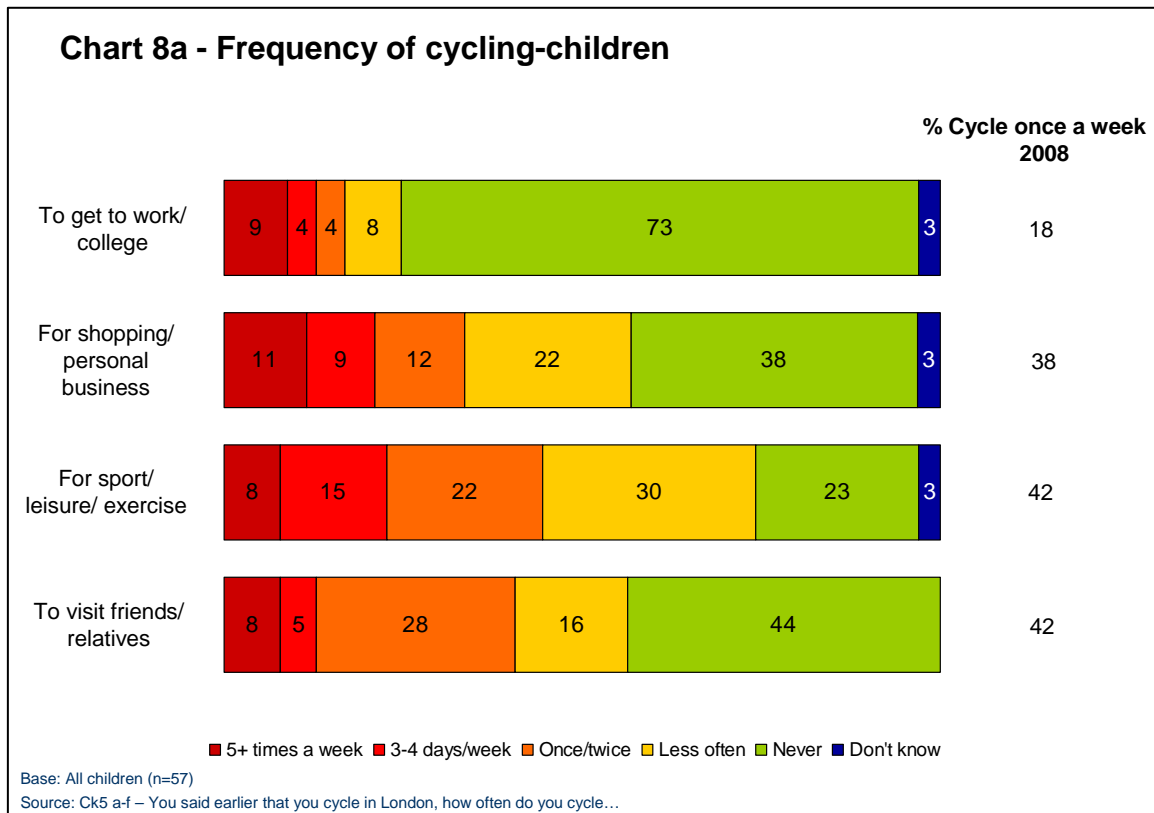
After prompting, just 4% of all Londoners were aware of British Cycling's Go-Ride Scheme. This being true of 29% of regular cyclists (three times a week or more often) and 11% of occasional cyclists (twice a week to once a month).

8. Adults versus children

Please note: base sizes throughout this section are small.

8.1 Frequency of cycling for specific journeys

The chart below shows how frequently the children we spoke to cycle for various journey purposes.



Cycling for sport/leisure/exercise is, as it was last year, the most common purpose for which the children we spoke to cycle on at least a weekly basis.

8.2 Number of trips summer/ winter

There was an increase in the number of times children claim to cycle per week in summer, from 6.7 times a week last year to 8.2 times a week now. The increase is also observed during winter time, as children claimed to cycle 4.1 times a week now compared to 2.2 last winter.

8.3 Changes in cycling

There was a rise in the amount of children who think they are cycling more than last year (53% now compared to 43% a year ago) and a reduction in the number of children who think they are cycling less (14% now compared to 20% a year ago).

8.4 Cycle training

The proportion of children saying they have ever had any cycle training (42%) heavily exceeds the proportion of adults (28%). The difference does not calculate to be significant, however, given the small sample size. One quarter of children, compared to one in a hundred adults told us that they have had cycling training in the last year.

8.5 Perceptions of cycling

As with adult Londoners, children were asked how appealing they felt a range of transport modes are:

Table 8b: Appeal of modes – mean scores (Very appealing = 5; Very unappealing = 1)

	2007		2008	
	Adults	Children	Adults	Children
<i>Base</i>	1208	60	1002	57
Walking	4.0	3.8	4.2	4.0
Car	3.3	3.5	3.4	3.8
Train	3.3	3.5	3.5	3.7
Bus	3.2	3.5	3.2	3.4
Tube	2.9	3.7	2.9	3.2
Cycling	2.8	3.8	3.0	3.9

As the table shows, cycling is more appealing to children than adults. Cycling is nowadays the second most appealing mode among children, behind walking. In the case of adults, cycling has become more appealing, overtaking the tube, but still scores poorly.

There were no major attitudinal changes for either group since last year. Children are still markedly more likely than adults to agree that *cycling is for everyone, a mode you would want to be seen using, a safe way of getting around, and that London is a city for cycling.*

8.6 Feelings of personal security

Children were also asked how safe from crime and antisocial behavior they felt when cycling in London during the day and at night. During the day, children are far more likely to feel safe, with seven in ten (69%) feeling very or quite safe compared with just more than half of adults (55%). However at night, children's feelings of safety drop dramatically, with only 8% feeling safe compared to 22% among adults.

8.7 Consideration of cycling more

Almost eight in ten children (78%) would *consider* cycling more in the future. The main reasons for willingness to *consider* cycling more were the same as last year, to increase fitness and to help the environment and the main modes they would replace were bus and car, also mirroring last year's findings.

8.8 Advertising recall

41% of the children we spoke to could recall some cycling related messages or advertising. This contrasts with 30% among adults.

8.9 Events

Only 6% of children and 4% of adults told us that they have attended a cycling event in the past year.

9. Appendix

9.1 Methodology

- A representative sample of Londoners was interviewed as part of the regular monthly research slot
- 1002 interviews with adult Londoners and 57 with children were conducted by fully trained Synovate interviewers
- Interviews were conducted with the member of the household with the 'next birthday'
- Fieldwork: Mar 3rd – 31st 2008, with some top-up interviews with children to achieve the 57 total conducted from Apr 21st – May 11th
- Data were subsequently weighted to the London profile (based on ONS data)