

Attitudes towards cycling
Annual report 2014
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FINAL REPORT





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Introduction and reporting note





Introduction

- To support the [Mayor's Vision for Cycling](#), which sets out to double cycling over a decade, Transport for London (TfL) is making significant investment including new and improved cycle routes through central London, and innovative 'mini-Hollands' in outer London boroughs
- "Attitudes towards Cycling" has been conducted since 2005 to assess cycling activity and attitudes among Londoners, and is one of a suite of important information sources to inform the delivery of this vision
- The results shown here are from the Spring 2014 survey which comprised 1,364 telephone interviews with adult Londoners. Data is weighted to represent the London population in terms of age, gender, ethnicity, working status and location (inner/outer London)



Reporting note

- Research conducted into cycling is affected by seasonality as the summer months see a greater level of cycling than other seasons. This should be taken into account when interpreting findings
- Throughout this report, data from 2014 are compared with last year's figures. Statistically significant differences with 2013 are shown as follows:

 **Significantly lower than 2013**

 **Significantly higher than 2013**

- From April 2014 TfL has adopted the 2011 Census data to define a 'representative' sample of Londoners, and data for 2014 in this report are weighted to represent this population. Data from previous waves continue to be weighted to the 2001 Census. Analysis has shown that this update in weighting has not materially affected key performance indicators



Summary





Summary

The picture of cycling

- Although the proportion of Londoners that cycle has remained unchanged at 19% this year, among those that do cycle there has been an increase in mode use
 - 72% of cyclists now ride at least once a week, up from 65% last year
 - A quarter of cyclists ride at least five days a week
 - Among occasional cyclists (those who ride once a fortnight or less), 56% now ride at least once a month, up from 49% in 2013

- These figures are borne out in reported behaviour: 29% of cyclists say they have increased the amount they cycle this year, while just 15% say they are cycling less

- Safety concerns remain the key barrier to increased cycling, with significant perceptions that cycling in London (particularly central London and on busy roads) is dangerous
 - Additionally, there is also a perception that cycling infrastructure could be improved (including cycle racks and lanes)

- There are however many positive attitudes towards cycling
 - The key motivator to cycling more/taking up cycling are a desire to get fit and active, and it is seen as an enjoyable and convenient mode



Behaviour that lies behind choosing to cycle

- TfL has developed a behaviour change model to assess cyclists' and non-cyclists' propensity to increase their level of cycling
- Four in five cyclists (81%) are in the 'sustained change' category, meaning they are already 'cycling more recently and are still doing it either regularly or occasionally'
- Similar proportions of non-cyclists (85%) are in the 'pre-contemplation' stage. This means they:
 - 'Have never thought about taking up cycling, but would be unlikely to start in the future'
 - 'Have thought about it but don't intend starting in the future'
 - 'Have never thought about it but could be open to it in the future'
- 6% of non-cyclists are in the 'lapsed' category, meaning that they 'started cycling, but couldn't stick to it'

→ Motivators and deterrents

- As in 2013, for both current cyclists and non-cyclists there are similar motivators and barriers to cycling more/taking up cycling
- Cycling remains a relatively unappealing mode of transport – half of non-cyclists rate the mode as unappealing. It is most attractive to men, young Londoners, BAME Londoners and current cyclists
- Fitness continues to be the key motivator to cycling. Other motivators include cost-savings over other modes, and cycling being a convenient and enjoyable form of transport
- The main barriers to cycling more/taking up cycling fall into two broad categories: safety and infrastructure
 - Concerns about safety remain the key barrier to increased cycling – particularly in Central London and on busy roads
 - Infrastructure is also an issue: around half of cyclists rate as ‘poor’ or ‘very poor’ the security of their bike when left unattended, availability of cycle racks near their home and availability of cycle lanes (ratings for the availability of cycle lanes have deteriorated this year)



Attitudes towards cycling

- Cyclists find trips within the local area to be much more appealing than journeys outside the local area and within central London
 - Three quarters of cyclists find these journeys appealing, whereas trips further afield or in central London only appeal to around half, falling to a third for occasional cyclists

- Perceptions of cycling as an activity are improving, and it is viewed as fast and convenient by many. Results for the following are the highest on record:
 - 90% agree cycling is becoming more popular (84% in 2013)
 - 86% agree it is enjoyable (81%)
 - 82% agree it is a good social activity (77%)

- Yet in some areas perceptions of safety have worsened this year:
 - 94% feel cyclists are vulnerable to other road users (90% in 2013)
 - 92% believe traffic makes people afraid of cycling on the streets of London (85%)

- Perhaps due to increasing safety concerns, there are signs of improved personal safety behaviour. Whereas last year nearly half of cyclists admitted they always cycled without a helmet, or without hi-vis clothing after dark, this has reduced to two in ten



Barclays Cycle Hire

- Awareness of Barclays Cycle Hire has increased significantly since 2013 (83% compared to 77%)
 - Awareness among non-cyclists has also seen a significant increase (80% compared to 75%)
 - Awareness among cyclists is 92% and has remained consistent with last year

- The proportion of Londoners who have used Barclays Cycle Hire has also increased this year (13% compared to 10% in 2013)
 - Use has increased significantly among women and BAME Londoners

- Barclays Cycle Hire has had a positive impact on the frequency of cycling/intention to cycle
 - 40% of current Barclays Cycle Hire users report that the scheme has increased the amount they cycle
 - Similarly 50% of intended users claim that the scheme is likely to increase the amount they intend to cycle

- However, the proportion of non-users who intend to use Barclays Cycle Hire in the future has decreased significantly this year (14% versus 26% in 2013), which could point to a slower rate of growth among Londoners in the year ahead



Barclays Cycle Superhighways

- 50% of Londoners say they are aware of Barclays Cycle Superhighways (BCSH), a significant increase compared to findings from 2013 (43%)
 - There remains some confusion between Barclays Cycle Superhighways and Barclays Cycle Hire. Once BCSHs are described, 18% who originally reported being aware of BCSH say they were thinking of something else
- Among those who are aware of Barclays Cycle Superhighways 22% report having used them (compared to 15% in 2013)
- A small proportion (15%) of those who are aware but have not used BCSH intend to use them in future, with limited frequency (once a month or less often)
- Nearly a fifth of BCSH users (19%) say they have increased their cycling as a result of BCSH lanes. This is significantly higher than reported in 2013 (10%)
- Despite improving results for awareness and use of BCSH, only one third of those aware of BCSH are satisfied with the availability across London. Satisfaction among users has declined significantly (49% compared with 64% in 2013)



Cycling events

- Nearly three quarters are aware of at least one show or event related to cycling, a similar proportion to last year, while 13% have attended a cycling event in London in the last 12 months
- Four in five Londoners are aware of the Tour de France and of those, 61% are aware that parts of the race will be held in England in 2014
 - The Cambridge to London sector has the highest level of awareness (55%)
 - 12% of all Londoners say they are likely to attend the Cambridge to London stage of the Tour de France
- Tour of Britain remains the most recognised British cycling event, with awareness increasing to 53% this year (vs 43% in 2013)
- As in previous waves, the incidence of Londoners claiming they will attend various cycling events in the future is somewhat inflated compared to actual past participation.
 - 30% claim they are likely to attend an event in the next year though only 13% attended this year
- One in five Londoners claim that celebrity cyclists motivate them to cycle more often



Investment in cycling

- An increasing proportion of Londoners feel that there is too little investment in cycling (42% compared with 32% in 2013)
 - Cyclists feel most strongly about this (57% agree that investment is too low), though an increasing amount of non-cyclists feel the same way (38% compared with 27% in 2013)

- 46% of all Londoners are aware of TfL's responsibility to improve cycling conditions in London



Cycle crime

- 56% of Londoners agree there is a lot of cycle crime in London, while two thirds are put off cycling by concerns about bike theft
 - At the time of completing the survey, nearly half of all Londoners claim to have seen news or social media coverage about cycle theft or collisions involving cyclists in the last month, the majority recalling news of collisions
- 14% of Londoners report being a victim of cycle theft in the last couple of years, though only half reported it to the police
- Cycle theft has a considerable impact on cycling behaviour for 56% of victims. While in most cases it has made them more cautious, for a significant few (16%) it has reduced the amount they cycle or even stopped them from cycling altogether
- That said, the majority of Londoners perceive cycling in London and their local area to be safe from crime or antisocial behaviour during the day
 - Cycling at night in local areas is perceived as being increasingly more safe (56% feel that it is safe compared with 52% in 2013)
 - A distinctly smaller proportion (35%) consider cycling around London at night safe
 - 45% of Londoners change their cycling route after dark, mostly to find better lighting or a safe route
- Almost all cyclists lock up their bikes when leaving them, yet only three in ten have their bike marked/registered with the police



Profile of cyclists





Profile of cyclists by frequency of cycling

- 19% of Londoners cycle. This figure remains consistent with previous years, though there is evidence that the frequency of cycling around London has increased.

- The proportion of cyclists who ride at least once a week has risen significantly, from 65% in 2013 to 72% now
 - A quarter of cyclists ride 5 days a week or more

- Among occasional cyclists (once a fortnight or less), 56% now cycle at least once a month, up from 49% in 2013



Cycling behaviour

- Most Londoners (84%) know how to ride a bike. Around half have access to a bike, though only a quarter of those with access say they use it
- Most cyclists, especially occasional riders, would like to use their bicycles more for social and exercise purposes
- 22% of London residents who commute do so by bicycle
 - A third of these (33%) do so every day, the large majority do so at least once a week (78%)
- There is evidence that the provision of cycling facilities such as cycle to work scheme or parking by companies/places of education would encourage Londoners to cycle as a means of commuting more often
- 29% report that they have increased the amount they cycle in London since last year while more than half say their cycling habits have remained unchanged
 - Just 15% say they cycle less this year
- Fitness and saving money remain the key reasons for increasing the amount of cycling trips they make, while concerns over safety continues to be the primary reason for cycling less often



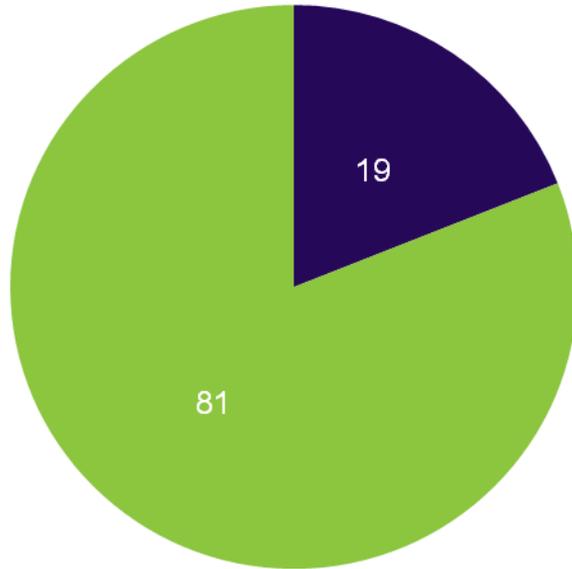
19% of Londoners cycle, with nearly three quarters of these (72%) cycling at least once a week

Cyclists and non-cyclists

Breakdown of regular and occasional cyclists

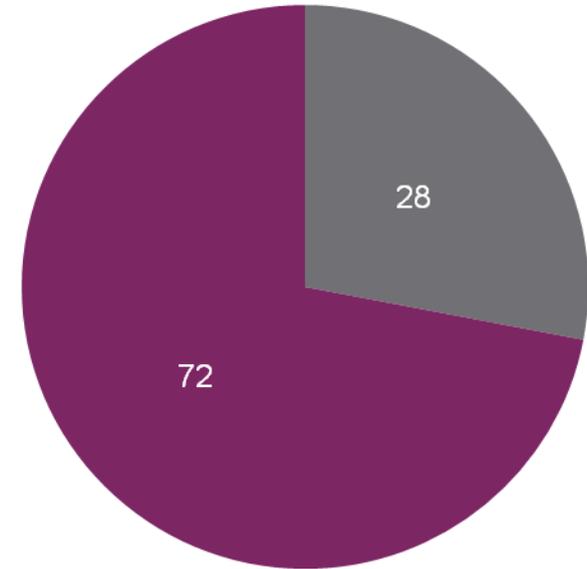
%

■ 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

■ 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 (1,364)

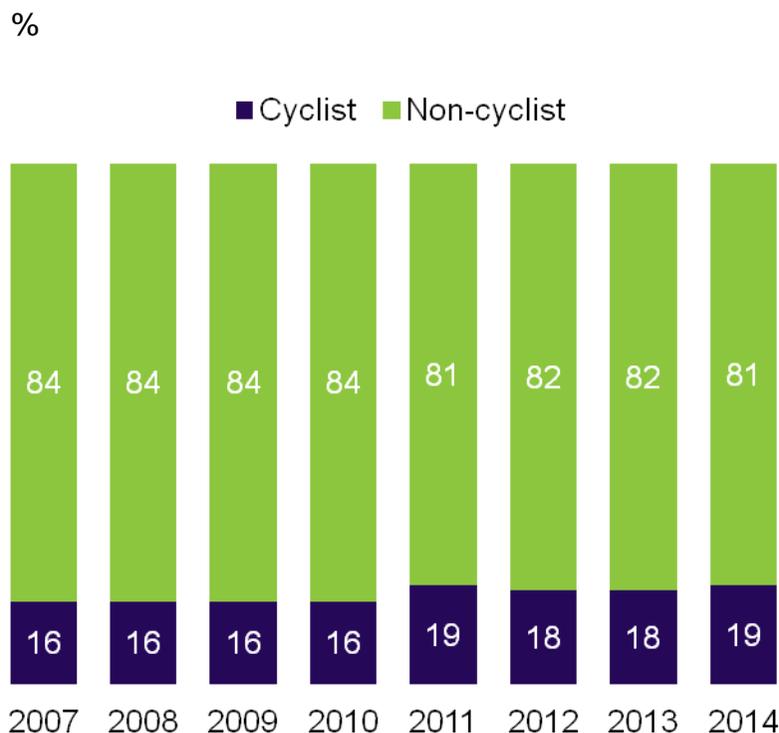
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London? Base: All cyclists (518)



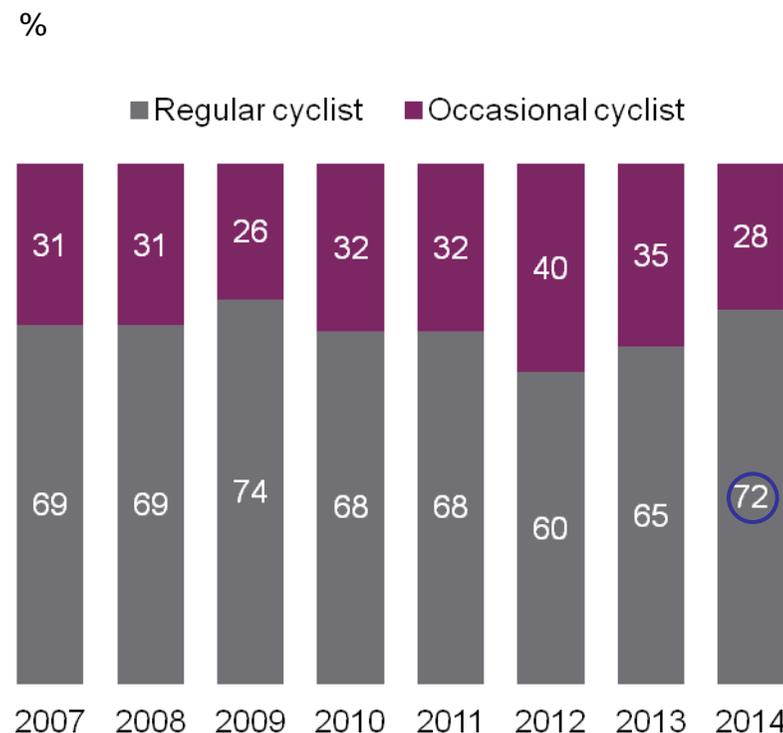
The level of cycling has remained relatively constant since 2011; the proportion of cyclists who do so 'regularly' shows a significant uplift in 2014

Profile of cycling over time

Cyclists and non-cyclists



Breakdown of regular and occasional cyclists



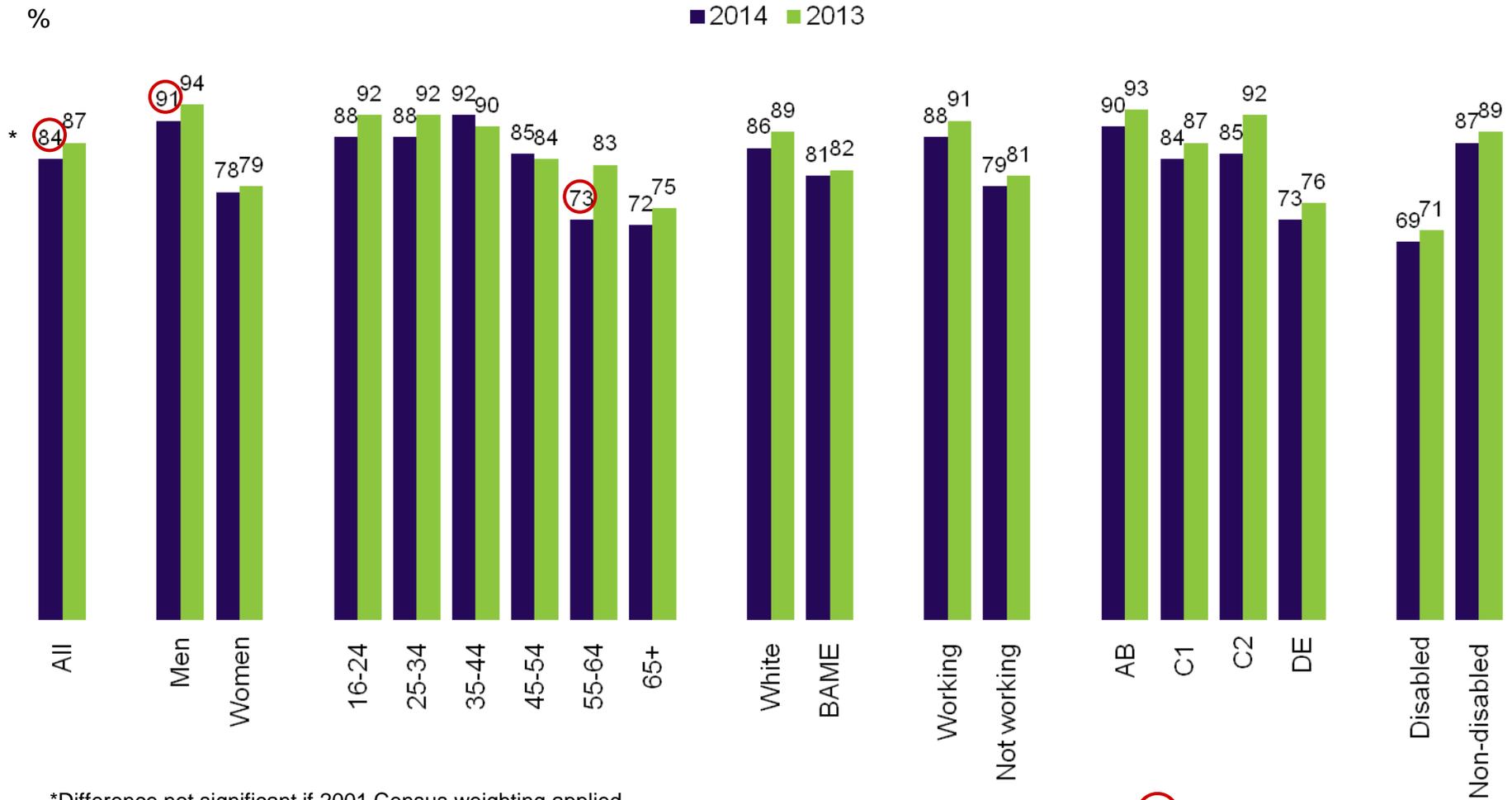
Significantly higher than 2013

QFREQ: Which of these modes of transport do you ever use to get around London? Base: all – 2014 (1,364) 2013 (1,373), 2012 (1,326), 2007-2011 (c1,000) QFREQ_BIKE: Typically, how often do you use a bicycle to get around London? Base: All cyclists – 2014 (518), 2013 (532), 2012 (508), 2007-2011 (c170)



Although most Londoners are able to ride a bike, most notably men and ABs, the proportion has fallen this year (to 84% from 87%)

Percentage able to ride a bike



*Difference not significant if 2001 Census weighting applied

Significantly lower than 2013



The proportion of Londoners who have household access to a bike has remained constant, as has the proportion that use it

Access to and ownership of a bike in the household

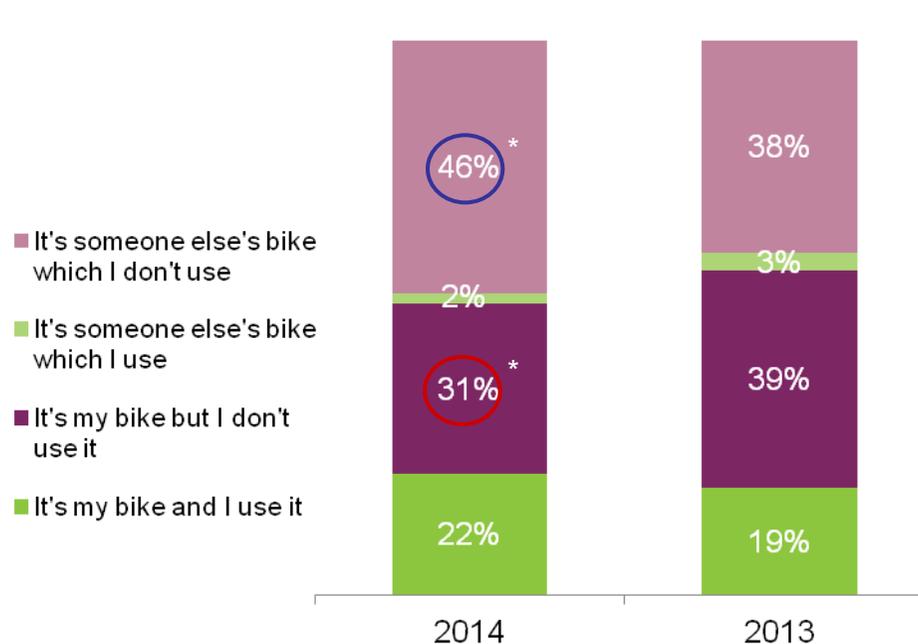
Access to a bike in the household

%



Ownership / use of the bike

%



*Difference not significant if 2001 Census weighting applied

○ Significantly lower than 2013 ○ Significantly higher than 2013

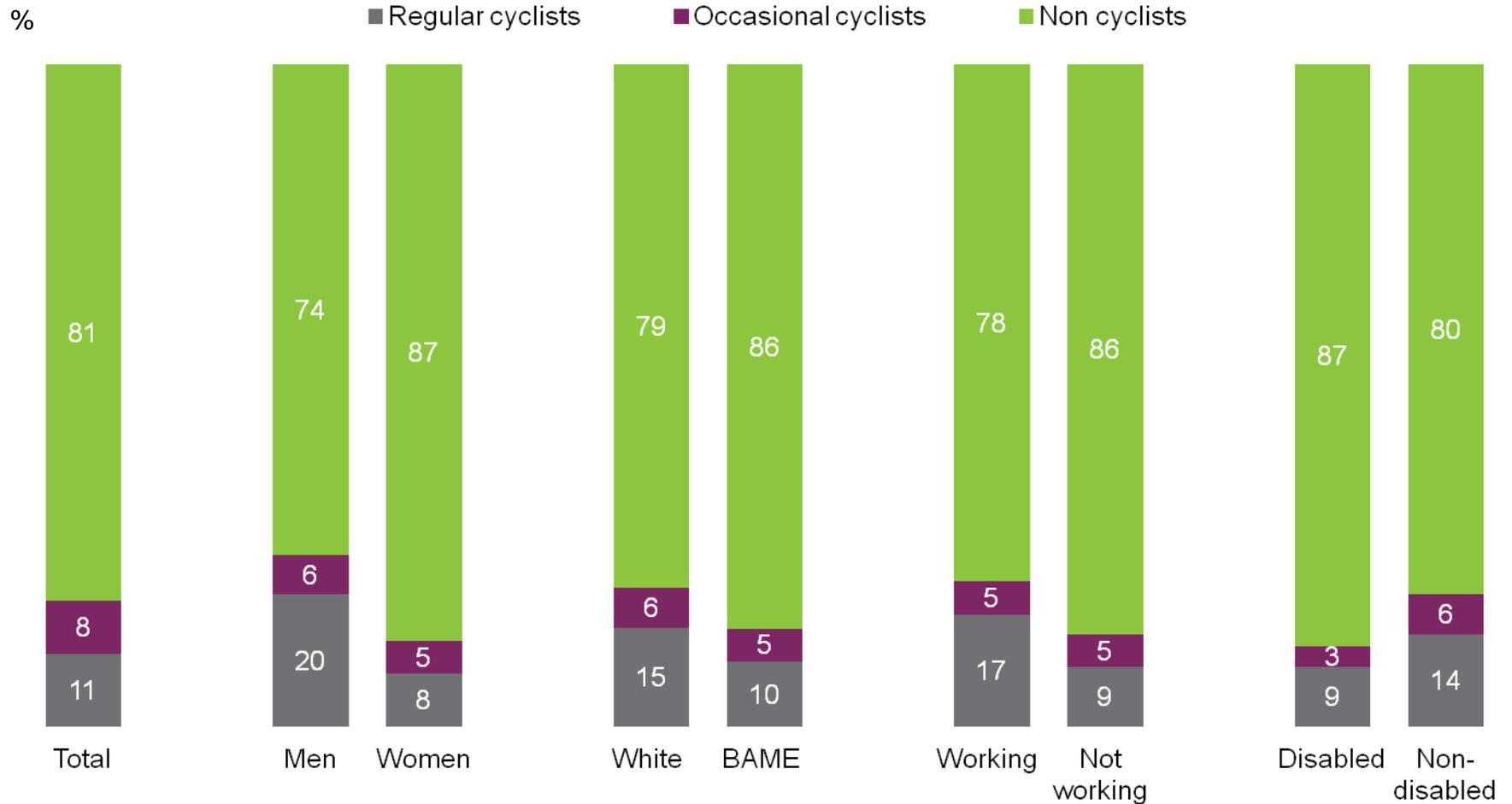
QACCESS1: Does your household have access to a bicycle, even if you don't currently use it? Base: all – 2014 (1,364), 2013 (1,373)

QVACCESSc: Can you tell me about the ownership/ use of the bicycle. Would you say...? Base: those with household access to a bike – 2014 (356), 2013 (440)



Regular cyclists are more likely to be men, white, working and non-disabled; this is consistent with 2013

Profile of cyclists



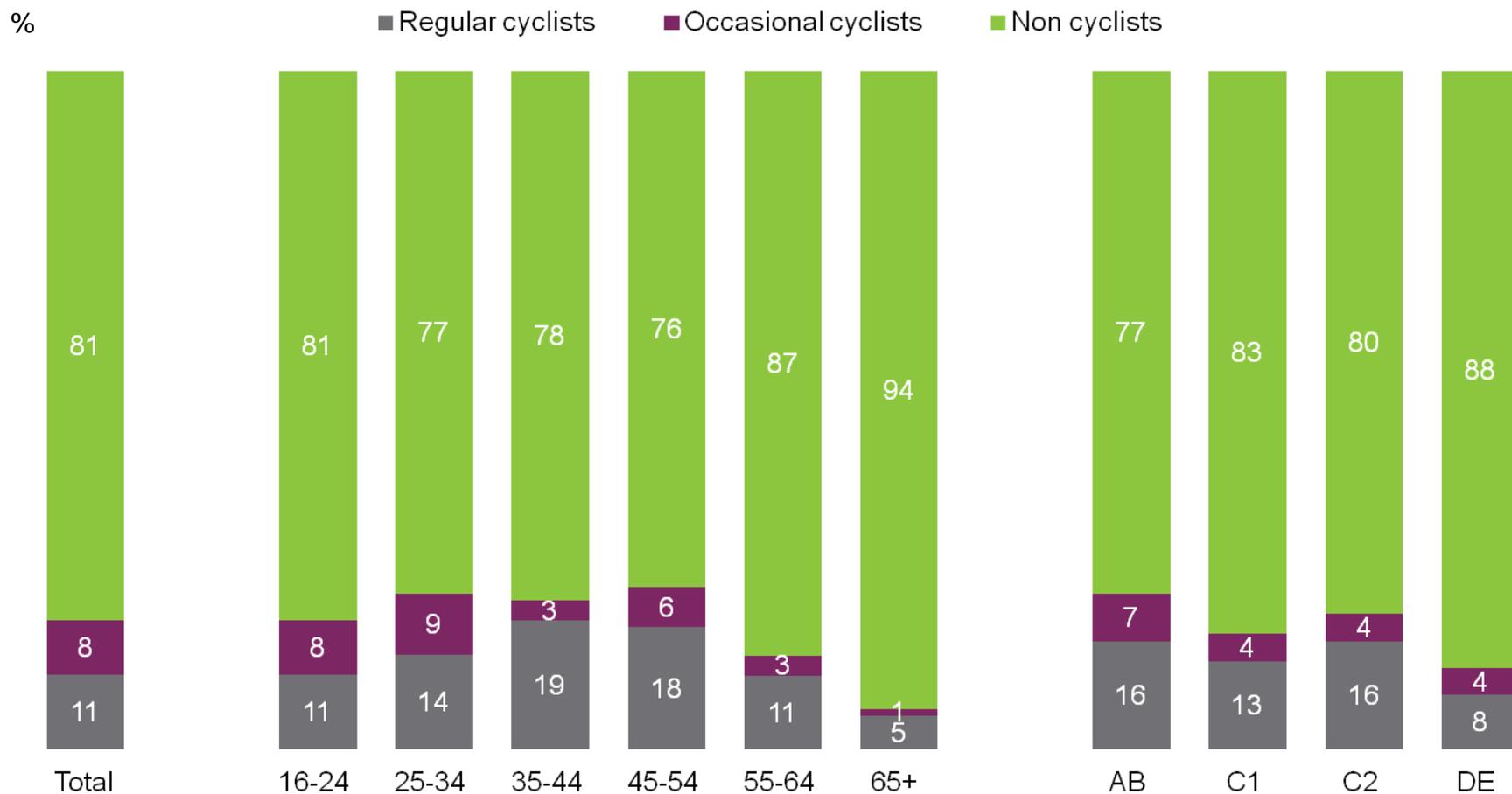
Demographic questions

Base: All – Regular cyclists (392), Occasional cyclists (126), Non-cyclists: (846)



Cyclists tend to be younger, with regular riders most likely to be in the 25-54 age bracket, and live in ABC1C2 households

Profile of cyclists



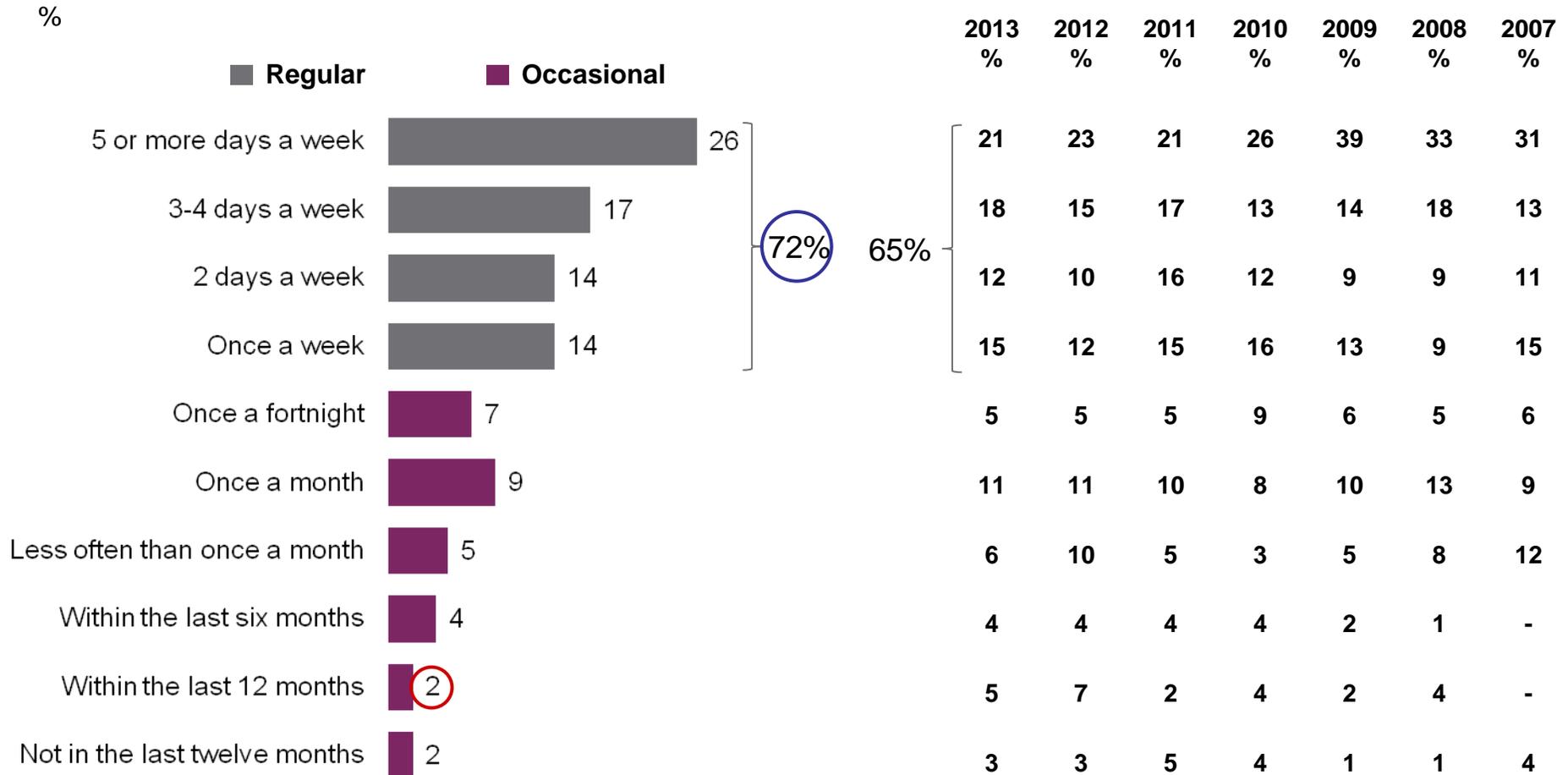
Demographic questions

Base: All – Regular cyclists (392), Occasional cyclists (126), Non-cyclists: (846)



Among all cyclists, 26% cycle five or more days a week. A little more than two thirds cycle at least weekly; a significant increase since 2013

Frequency of cycling among cyclists



○ Significantly lower than 2013

○ Significantly higher than 2013

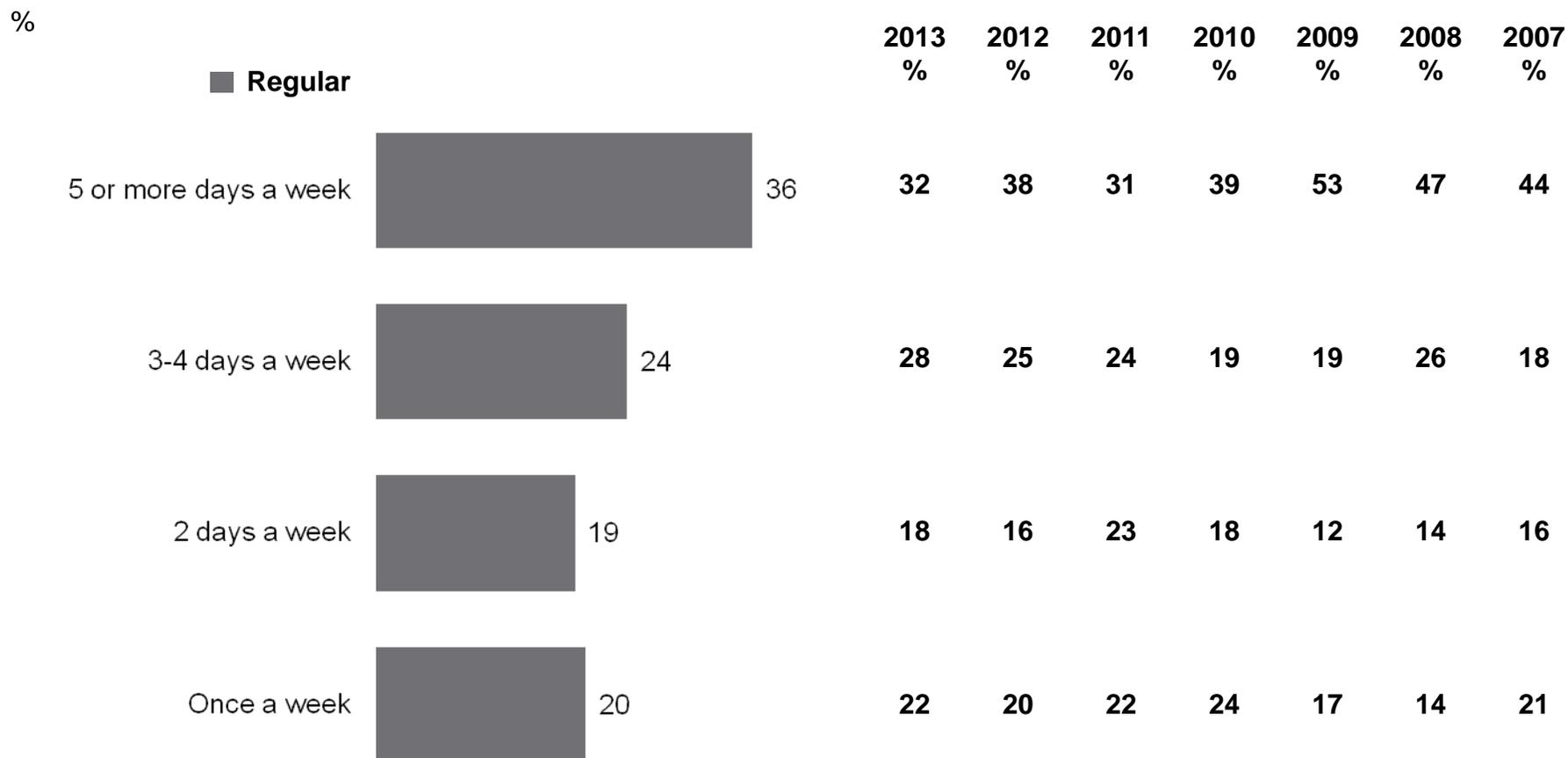
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

Base: All cyclists – 2014 (518), 2013 (532), 2012 (505), 2011 (176), 2010 (156), 2009 (164), 2008 (159), 2007 (188)



A third of regular cyclists ride at least five days a week; a small, though not significant increase vs 2013

Frequency of cycling among regular cyclists (trend)



No significant differences compared with 2013

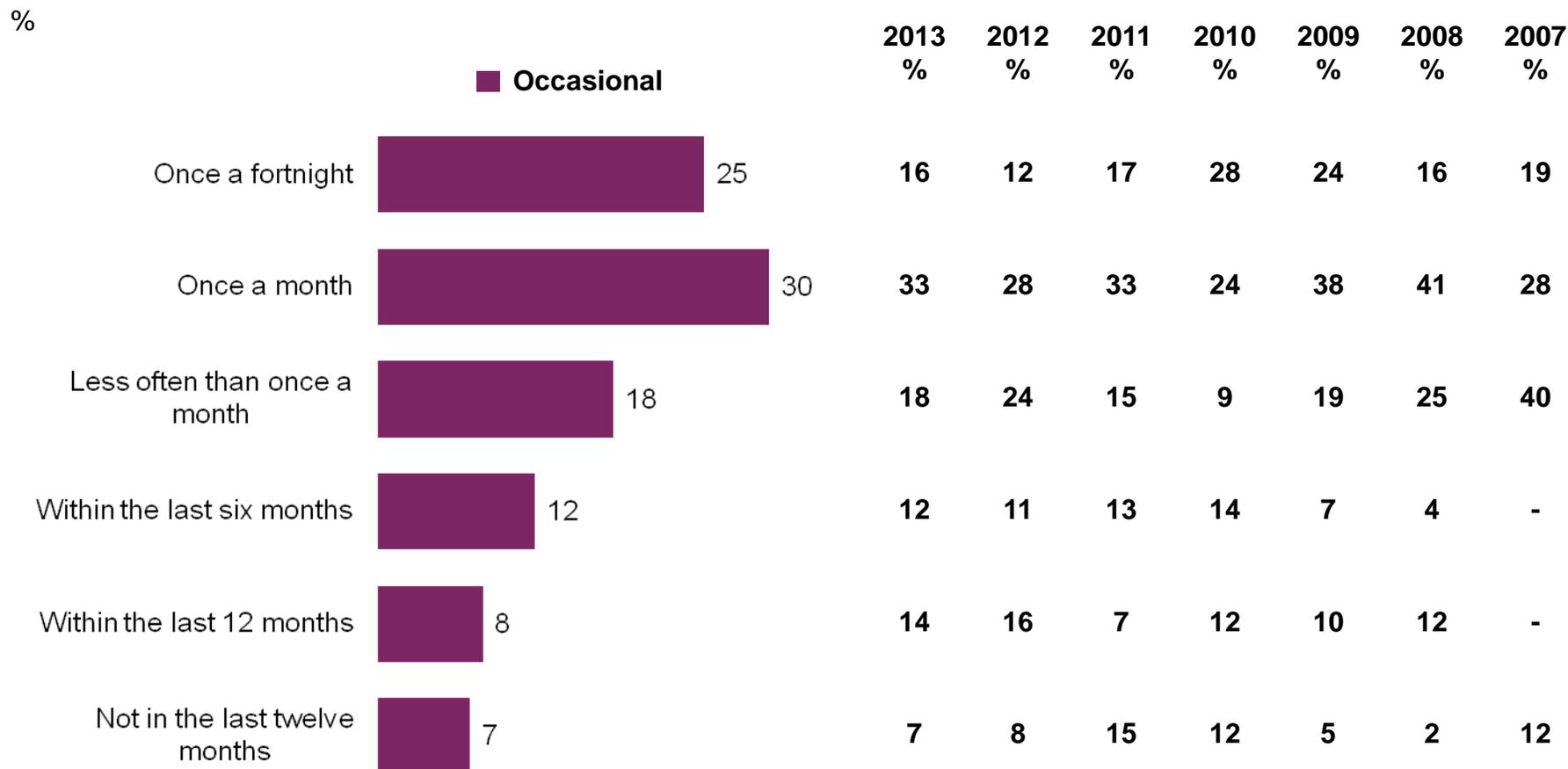
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

Base: Regular cyclists – 2014 (392), 2013 (329), 2012 (292), 2011 (115), 2010 (107), 2009 (121), 2008 (110), 2007 (131)



Just over half (56%) of occasional cyclists use their bikes at least once a month, showing an upward trend since 2012 and 2013 (40% and 49%)

Frequency of cycling among occasional cyclists (trend)



No significant differences compared with 2013

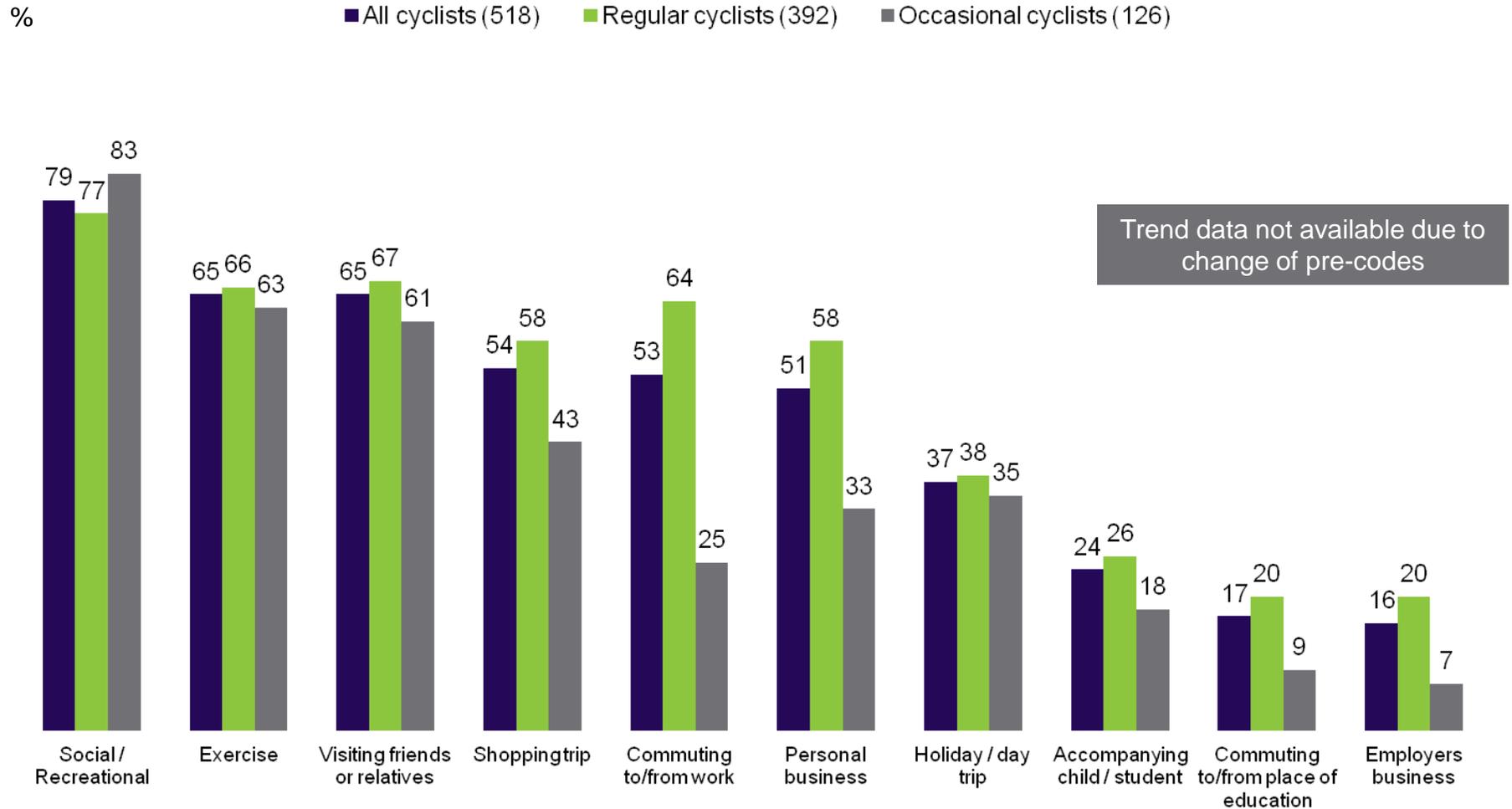
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

Base: Occasional cyclists – 2014 (126), 2013 (203), 2012 (213), 2011 (61), 2010 (49), 2009 (42), 2008 (49), 2007 (57)



Most cyclists ride for social and exercise purposes. Regular cyclists are also more likely to commute, carry out personal business or visit friends/relatives by bike

Cycling for different journey purposes



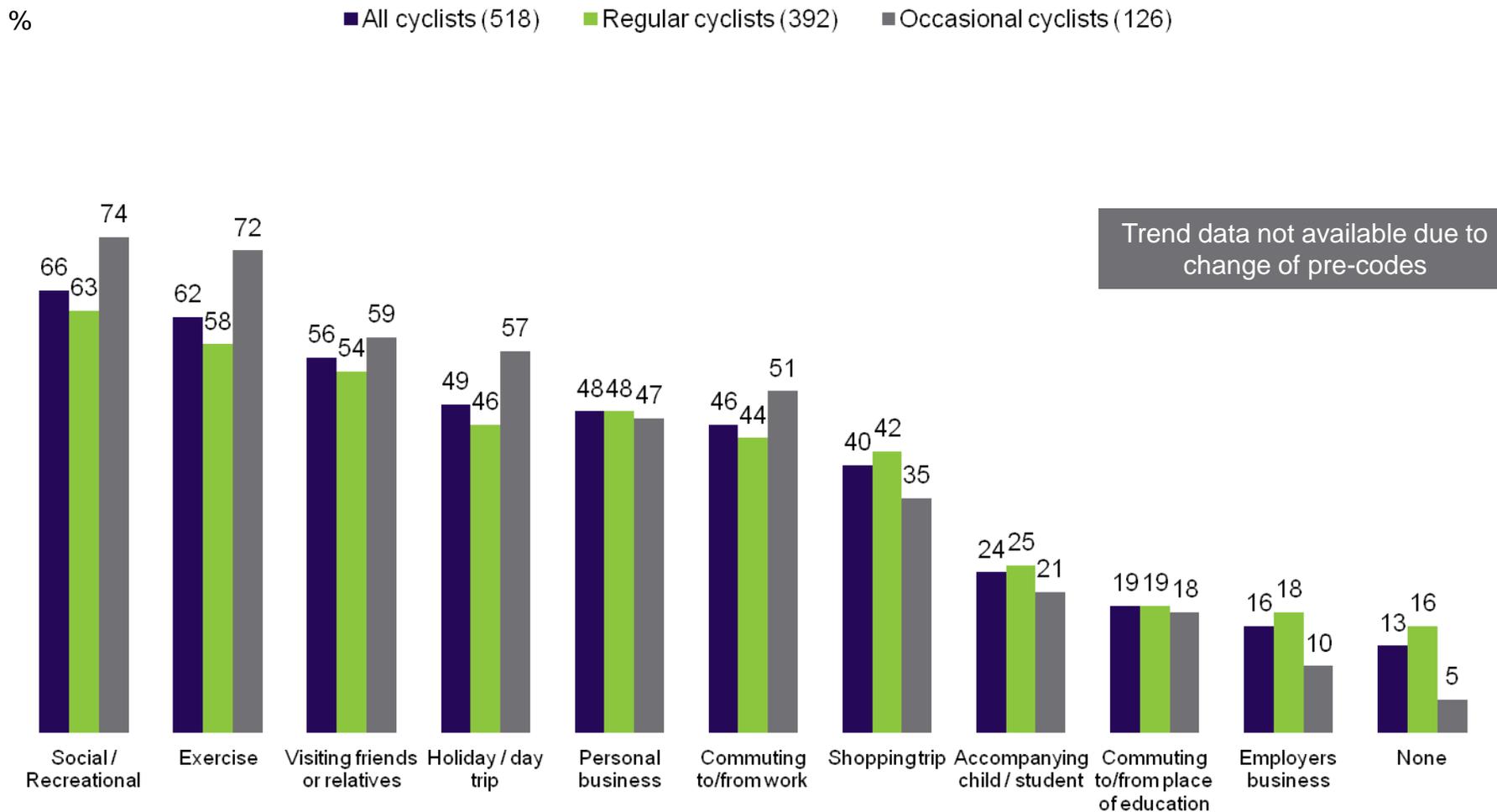
F1: What types of journey do you make by bicycle?

Base: All cyclists (518)



Most cyclists would like to use their bicycles more, especially for social and exercise reasons – occasional riders in particular

Desire to cycle for different journey purposes



F1a: Which types of journey would you like to make more of by bicycle?

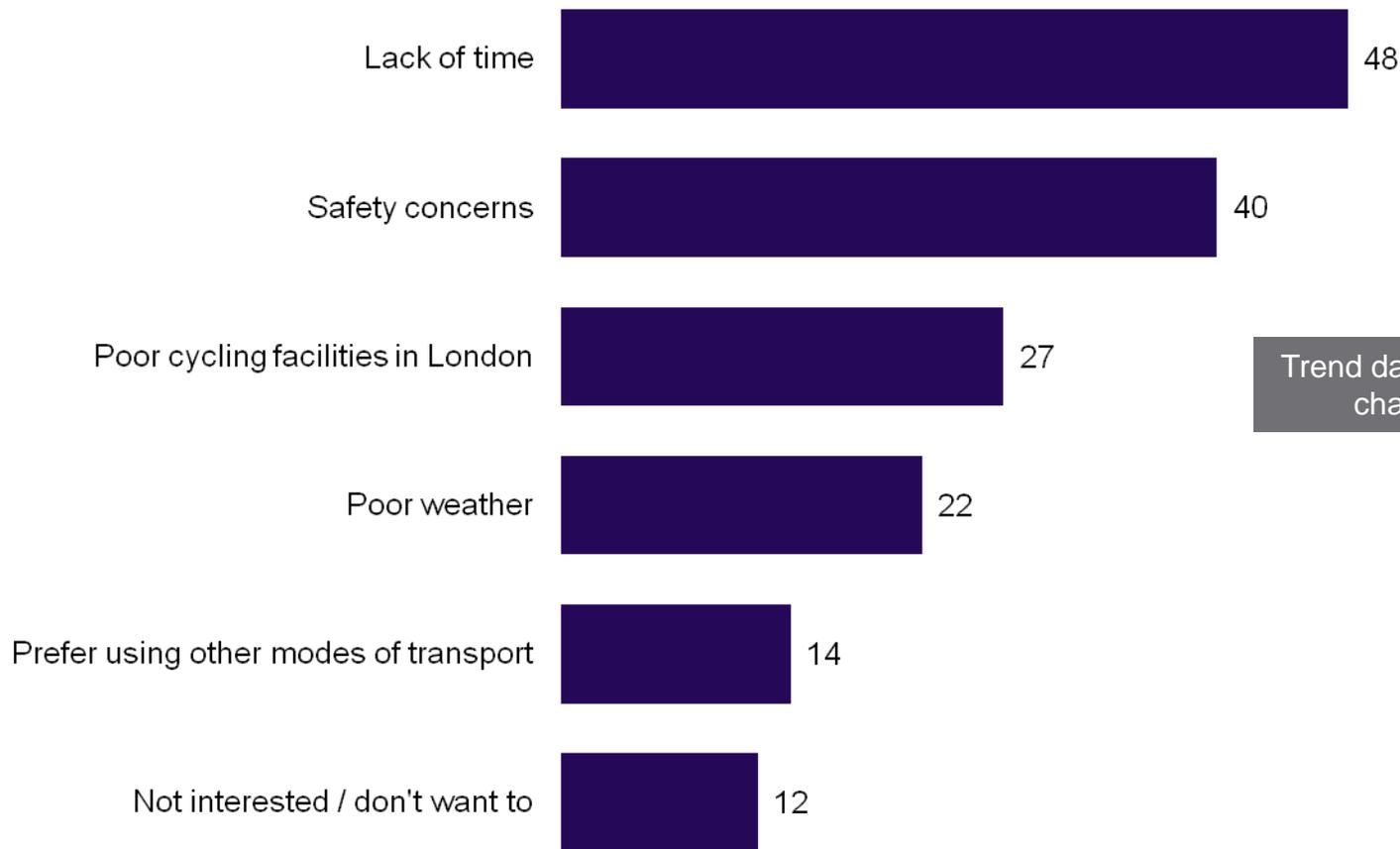
Base: All cyclists (518)



Lack of time and safety concerns are the biggest barriers to making cycling trips other than for sport, leisure or exercise

Deterrents to making cycling trips other than for sport, leisure or exercise

%



Trend data not available due to change of pre-codes

Mentions above 10% shown

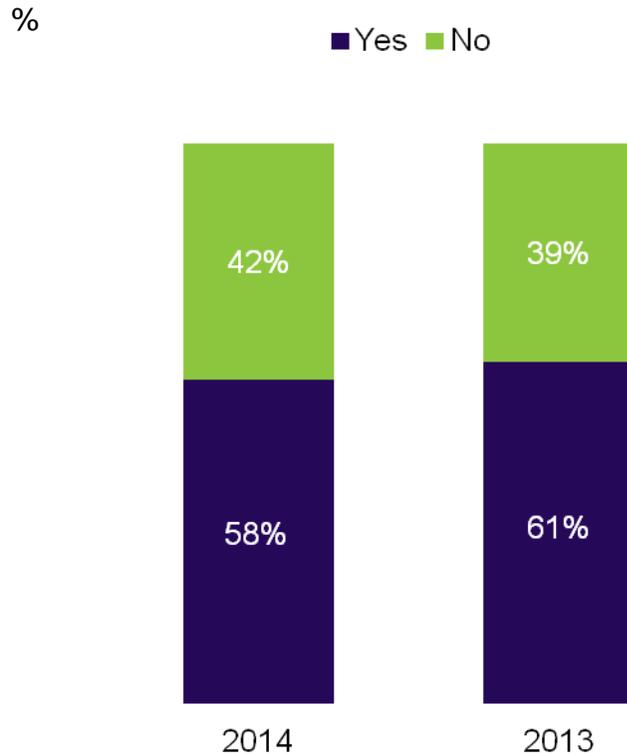
F2: What stops you from cycling for trips other than sport, fun or exercise?
Base: All cyclists who only cycle for sport, leisure or exercise (25* caution low base)



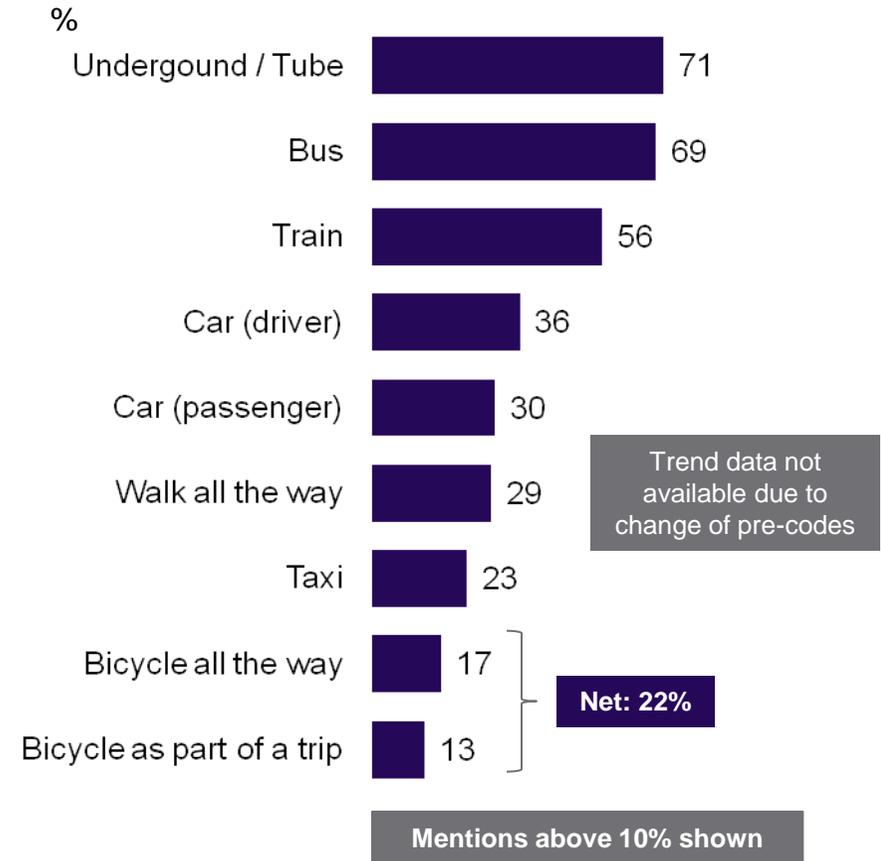
Three in five Londoners commute in the Capital (consistent with 2013). Tube (71%) and bus (69%) are the most commonly used modes, while 22% cycle at least part of the way

Commuting in London and modes used

Commuting in London



Modes of transport for commuting



G1: Do you ever commute in London, by which I mean travelling to work, school, college or university? All –2014 (1,364), 2013 (1,373)

G2: Which types of transport do you use to commute in London? All who commute (737)

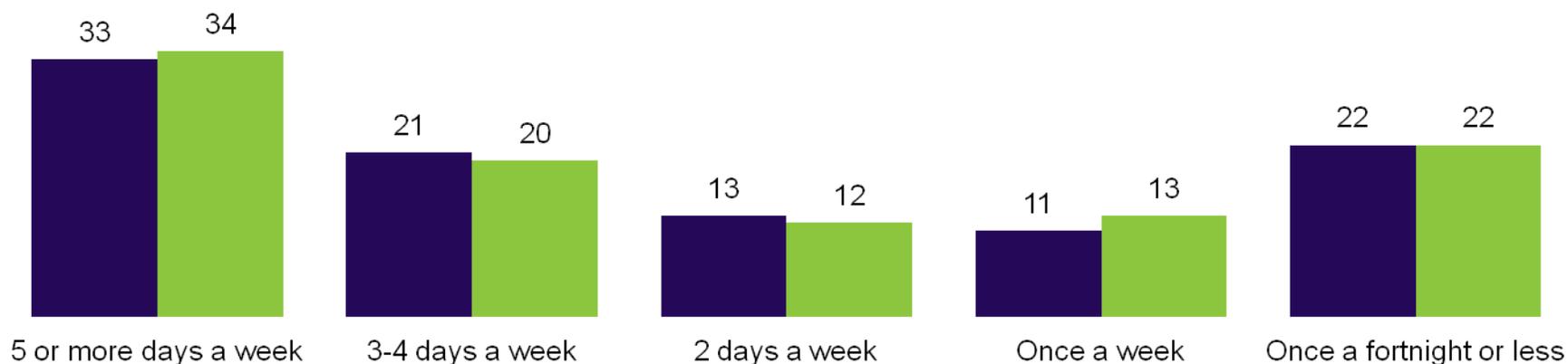


Over half (54%) of those commuting by bike do so at least three days a week, consistent with last year

Frequency of commuting by bike

%

■ 2014 ■ 2013



No significant differences compared with 2013

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

Base: Those commuting by bike, 2014 (250), 2013 (234)

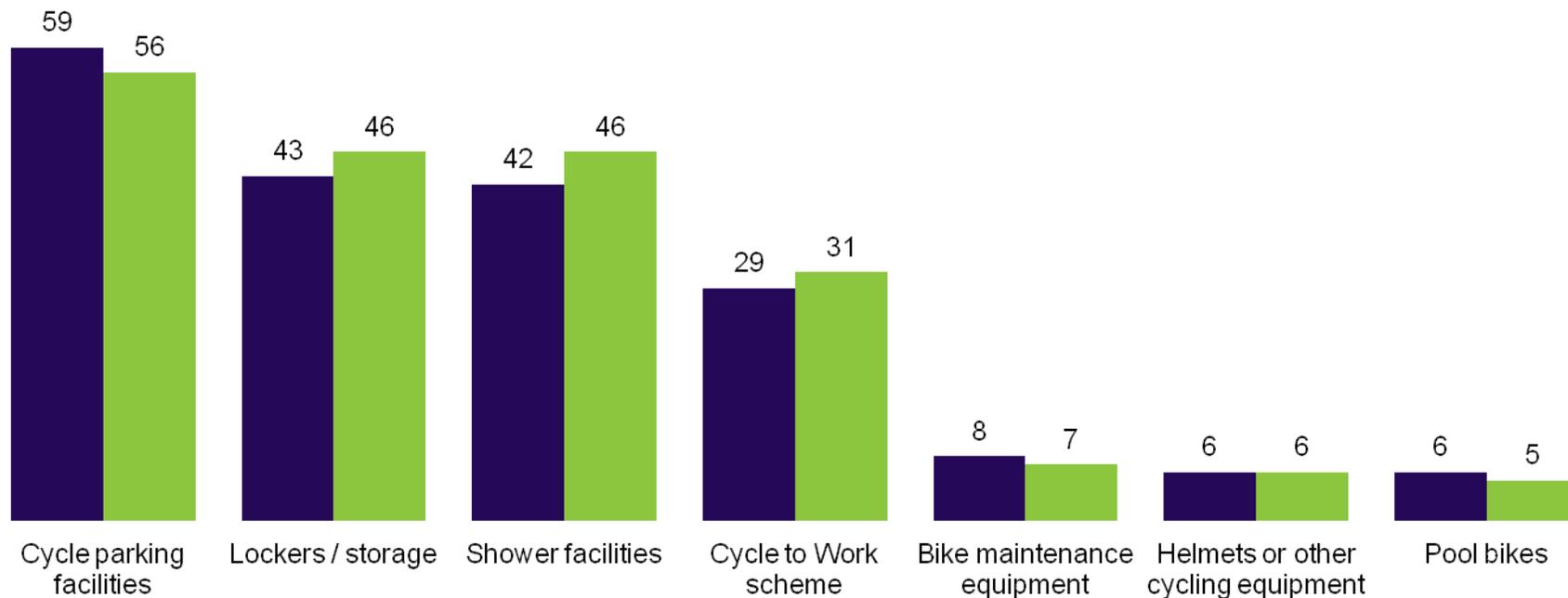


As in 2013, commuters are most likely to report that their workplace has cycle parking facilities; other cyclist facilities remain less common

Cycling facilities at work

%

■ 2014 ■ 2013



No significant differences compared with 2013

G5: Does your employer/ place of education provide any of the following...?

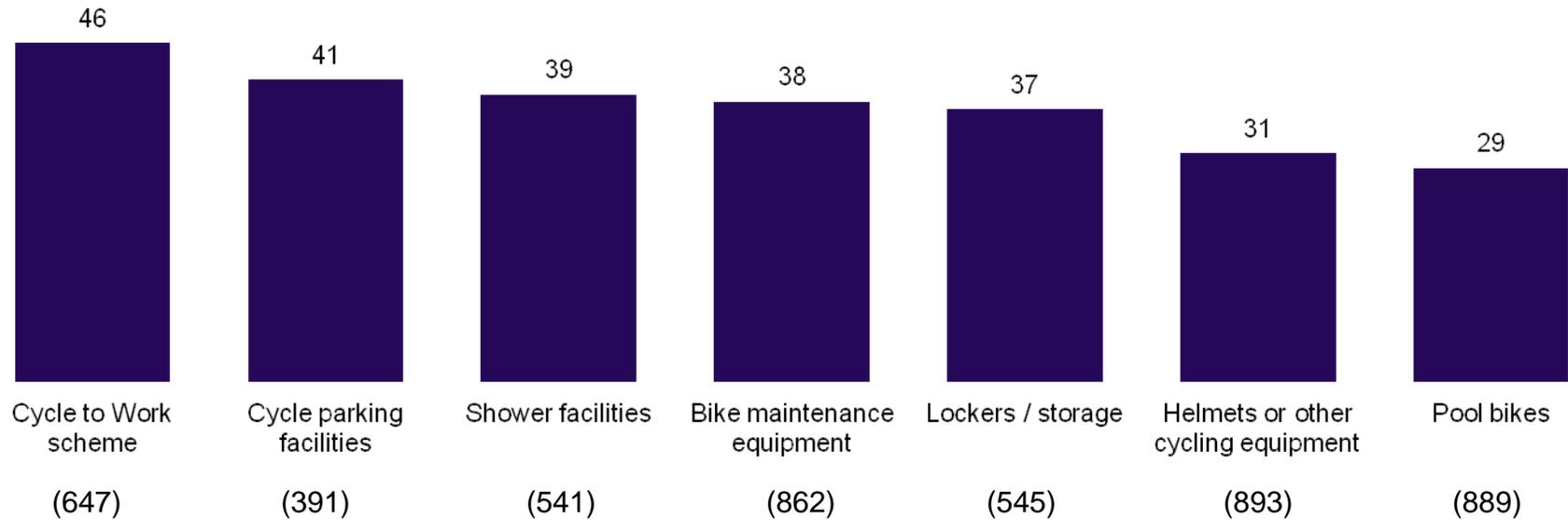
Base: Those who work or are in education or who commute in London – 2014 (942), 2013 (817)



A cycle to work scheme, parking or shower facilities would be most likely to encourage commuters to cycle

Cycling facilities that would encourage cycling

%



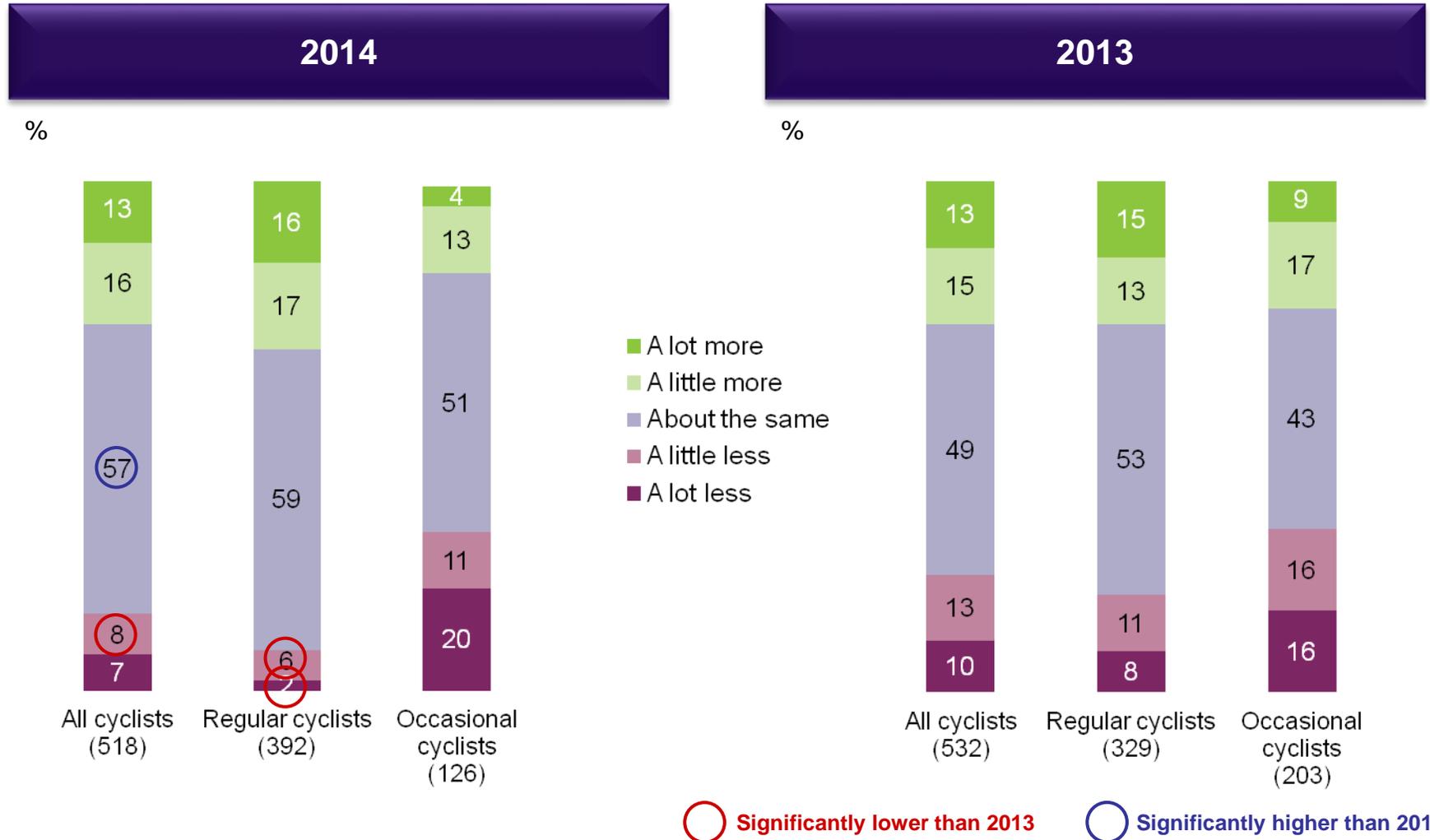
G6: Would it encourage you to cycle to work more if your employer/ place of education offered more facilities for cyclists?

Base: All respondents who work or are in education or who commute in London and are not provided with facilities (base sizes in brackets above)



Over half of cyclists say they have not changed their cycling habits since last year. Of those who have, it tends to be regular cyclists who are making more bike trips (33% cycle more) while 31% of occasional cyclists are riding 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...?

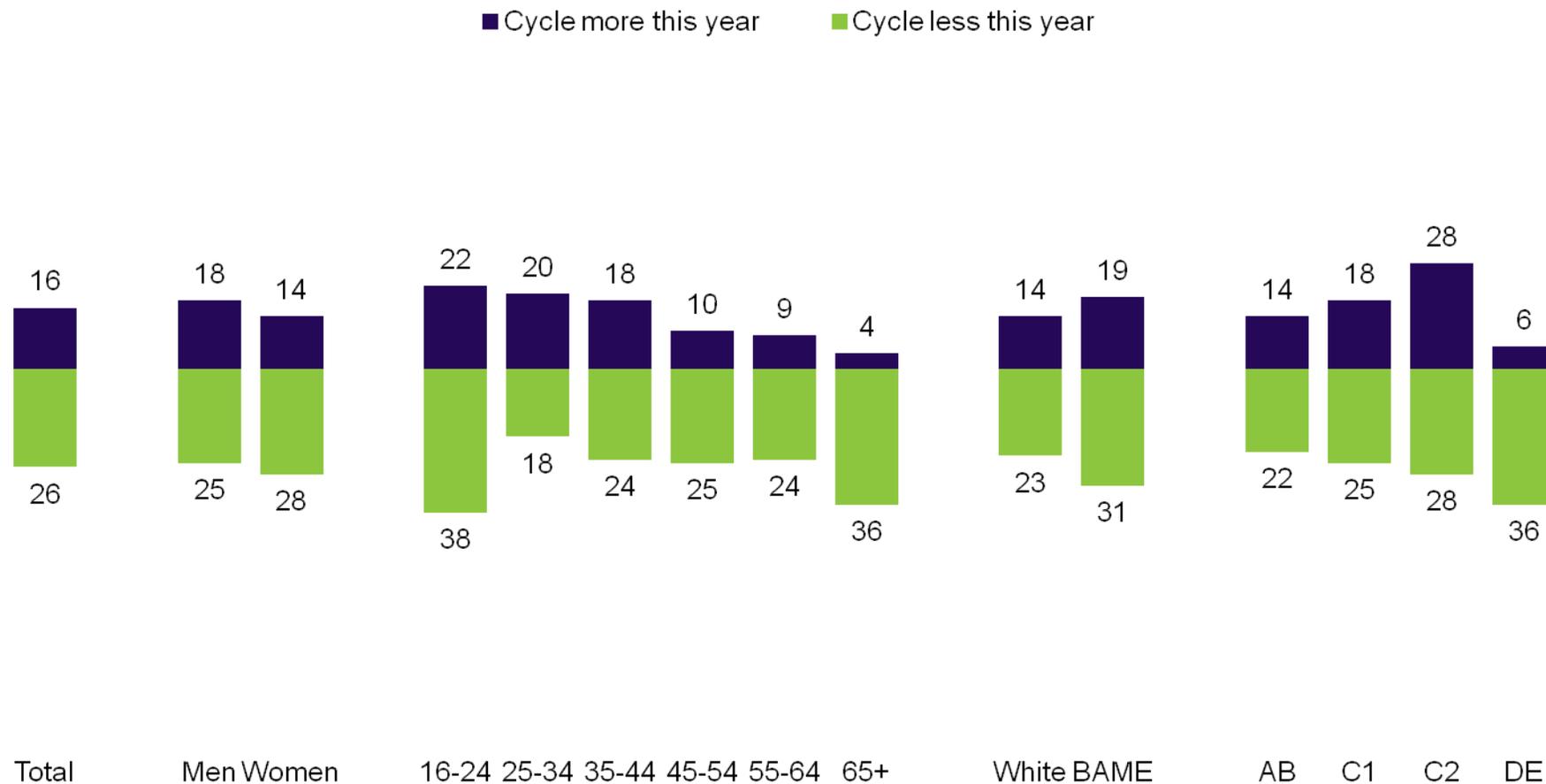
Base: All cyclists – 2014 (518), 2013 (532)



Overall, Londoners are more likely to say they are cycling less rather than more. The only group to show a small net gain is 25-34 year olds.

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 (931)

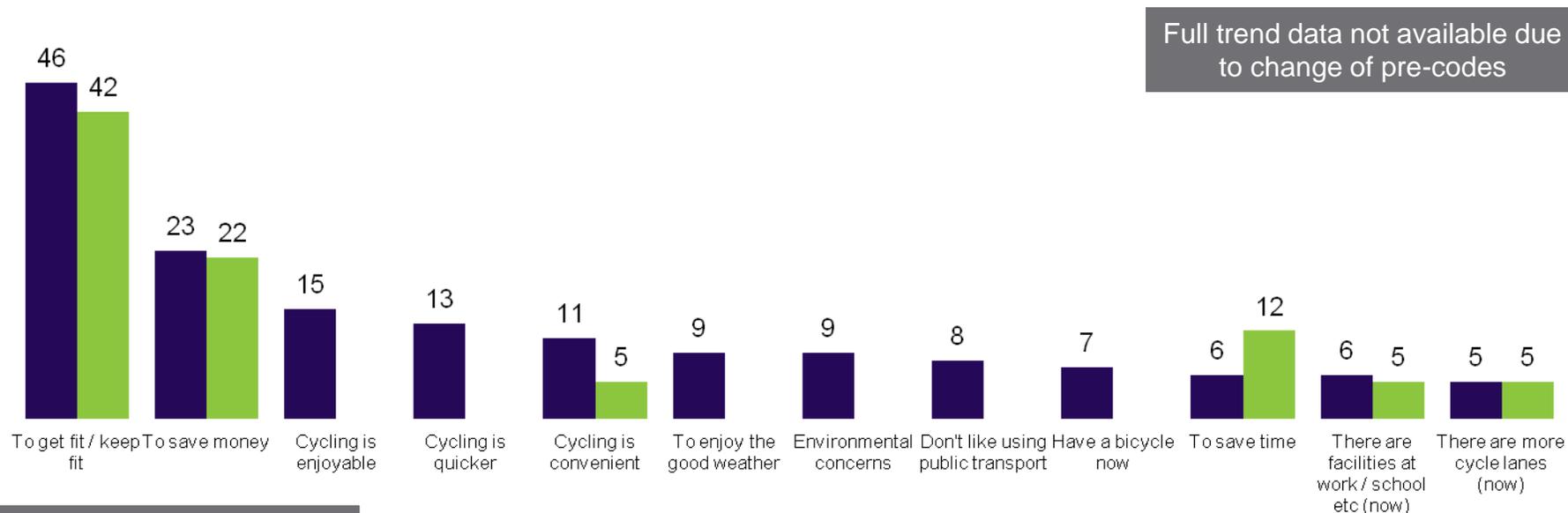


The key reason to cycle more, stated by nearly half, is to keep/get fit, followed by saving money. Convenience is a growing factor.

Reasons for cycling more

%

■ 2014 ■ 2013



Mentions above 4% shown

D2. Why have you started cycling more this year?

Base: all cycling more (2014: 158, 2013: 168)

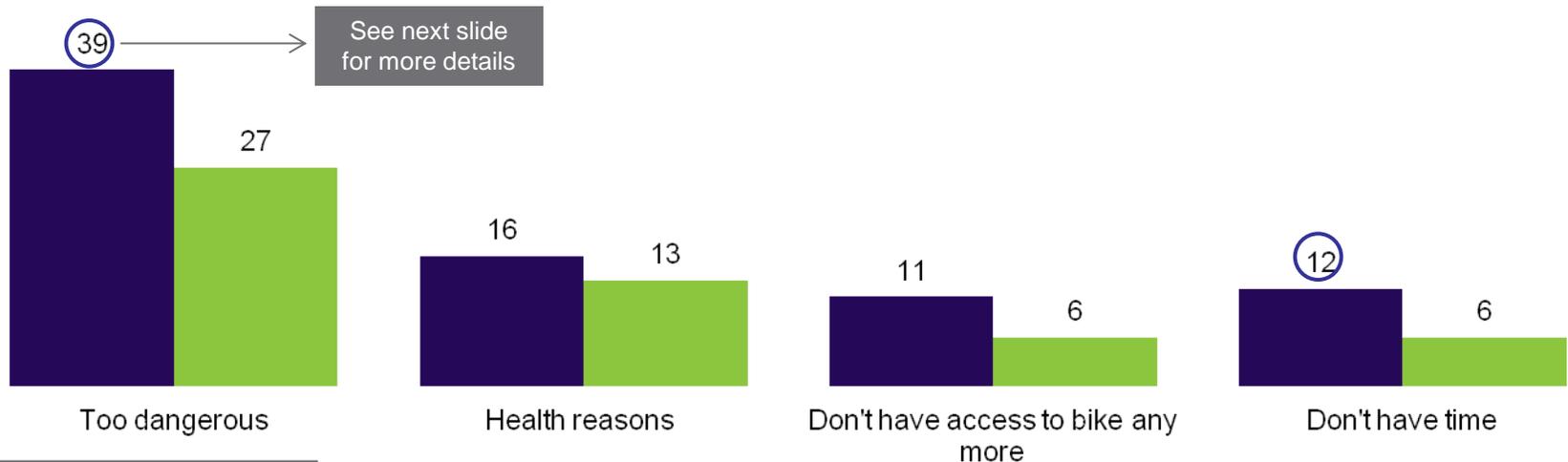


Safety concerns (especially busy traffic) are an increasingly cited reason why some say they are cycling less. Lack of time has also risen

Reasons for cycling less

%

■ 2014 ■ 2013



See next slide for more details

Mentions above 10% shown

○ Significantly higher than 2013

D4/D5: Why are you cycling less this year? / Why do you feel that cycling is dangerous?

Base: All respondents who are cycling less this year 2014 (212), 2013 (240)



Cyclists believe it is too dangerous because traffic is too busy, their fear of collisions and the lack of cycle lanes in London

Reasons for cycling less

	%
Traffic too busy	66
Fear collisions	28
Lack of cycle lanes	19
Dangerous/bad drivers	14
Other cyclists	12
Other road users	11
Can't be seen by lorries/buses	8
Seen press about a collision	6
I have had a collision	6
Cycle lanes are dangerous	6
Road surfaces in a poor condition	4
Don't know a safe route	3

Mentions above 10% shown

D4/D5: Why are you cycling less this year? / Why do you feel that cycling is dangerous?

Base: All respondents who are cycling less this year 2014 (212), 2013 (240)



Children's cycling



→ Children's cycling - summary

- There has been an increase in the number of children who own bikes
 - 69% of households with children under the age of 16 years report their child owns a bike compared to 65% in 2013
- However, as reported last year, only 17% of these children regularly cycle to school
- The majority (67%) of children who cycle to school are aged between 7-11 years old
- Safety (35%), distance (24%) and being too young to cycle (21%) are reported as being the key barriers for children cycling to school more often



In households where there is a child, the proportion of child(ren) that own a bike has risen significantly, but only one in six of these regularly cycle to school

Whether children in the household have access to a bike / cycle

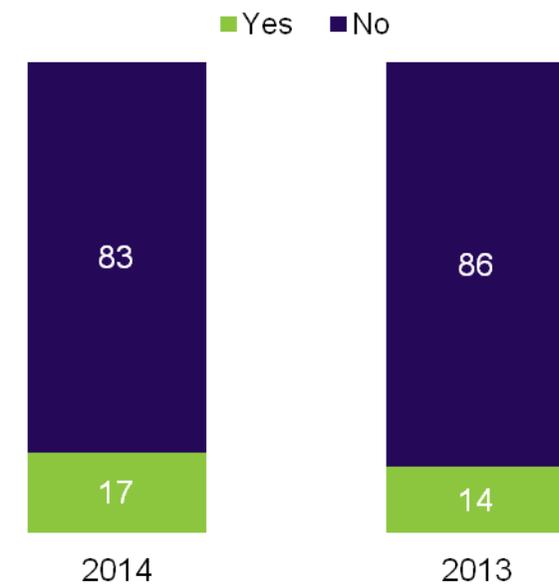
Whether child owns a bike

% Base: all with child >16



Whether child cycles to school regularly

% Base: all with child >16 with a bike



34% of all respondents have at least one child under the age of 16 living in their household

**How many children cycle to school regularly? (Base: 54)
One: 57%, Two: 42%, Three or more: 1%**

G7: How many children under the age of 16 live in your household?
Base: all – 2014 (1,364), 2013 (1,373)

G8: Does your child/children own a bike?
Base: all with children – 2014 (364), 2013 (377)

G9: Do any of the children in your household cycle to school regularly (at least once a week)?
Base: all with children who own a bike – 2014 (271), 2013 (273)

Significantly lower than 2013

Significantly higher than 2013



Safety concerns, and the distances involved, are the top reasons why children don't cycle to school

Reasons why child does not regularly cycle to school



Trend data not available due to change of pre-codes

Mentions above 3% shown

G11: Why doesn't your child/don't your children cycle to school?
Base: All whose children own a bike but do not cycle to school regularly (217)

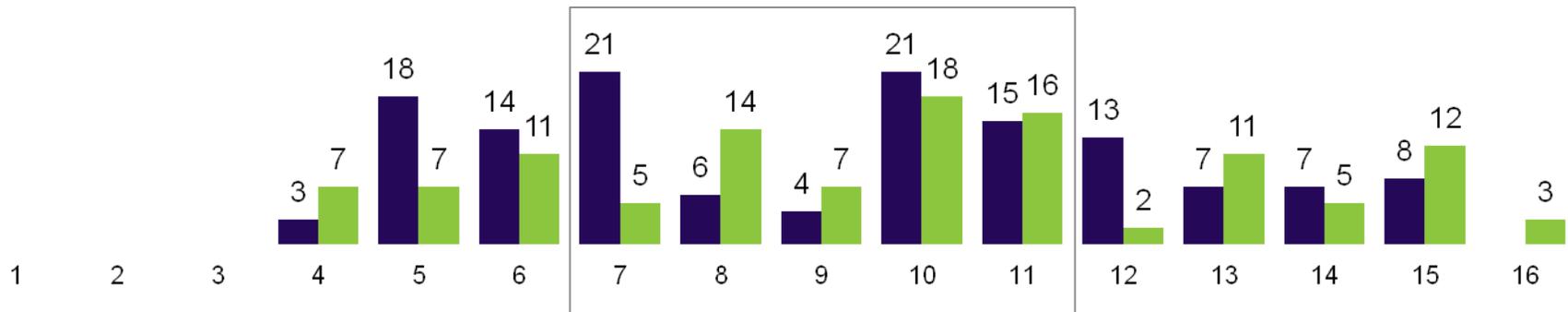


Two thirds (67%) of those who ride a bike to school regularly are aged 7-11

Age of child who rides a bike to get to school

%

■ 2014 ■ 2013



G10: How old is your child/are your children who cycle to school at least once a week?

Base: All with a child who rides to school regularly – 2014 (54), 2013 (40) caution low base sizes



Cycling history





Cycling history

- As seen in 2013, the majority of Londoners (84%) who can ride a bicycle learned to do so by the age of 10, and only 2% learned after their teenage years
 - Two thirds were taught by their parents (66%)

- Many (66%) take a break from cycling at some point, often of more than a year
 - The most common reason is a change of house or job, followed by use of another mode of transport instead

- The main reason for returning to cycling, as in 2013, was related to fitness, reported by 48%. The opportunity to save money (33%), convenience (28%) and enjoyment (25%) were also mentioned

- When returning to/starting cycling, around half (52%) take some precautionary measures to build up their confidence - an increase since 2013 (41%)
 - Practising in quiet areas (18%) or taking familiar roads (13%) are most common steps taken

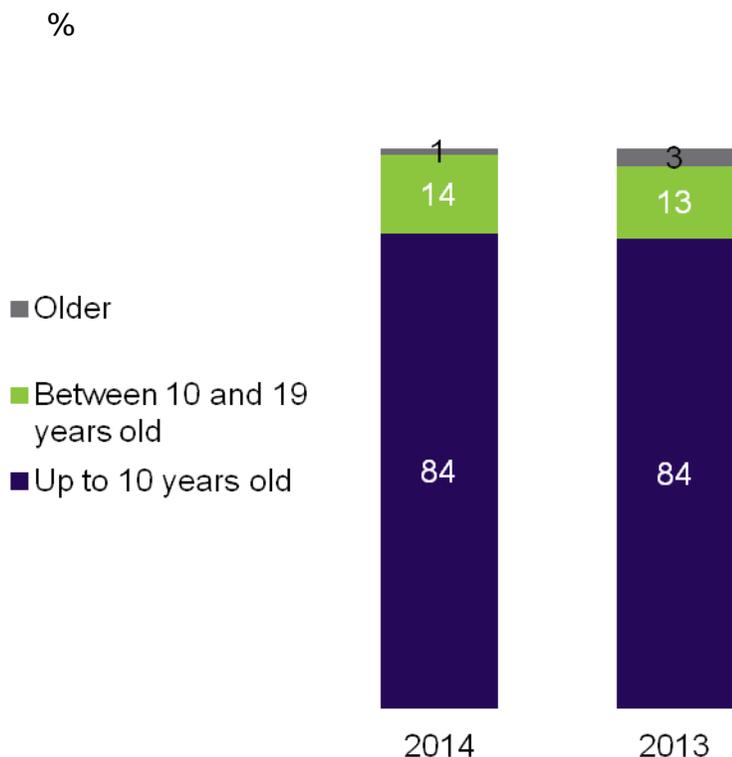
- Two thirds (67%) of those with access to a bike, especially cyclists (92%) say they maintain it
 - The majority (73%) do this themselves, while a sizeable minority take their bike to a local cycle shop (28%)



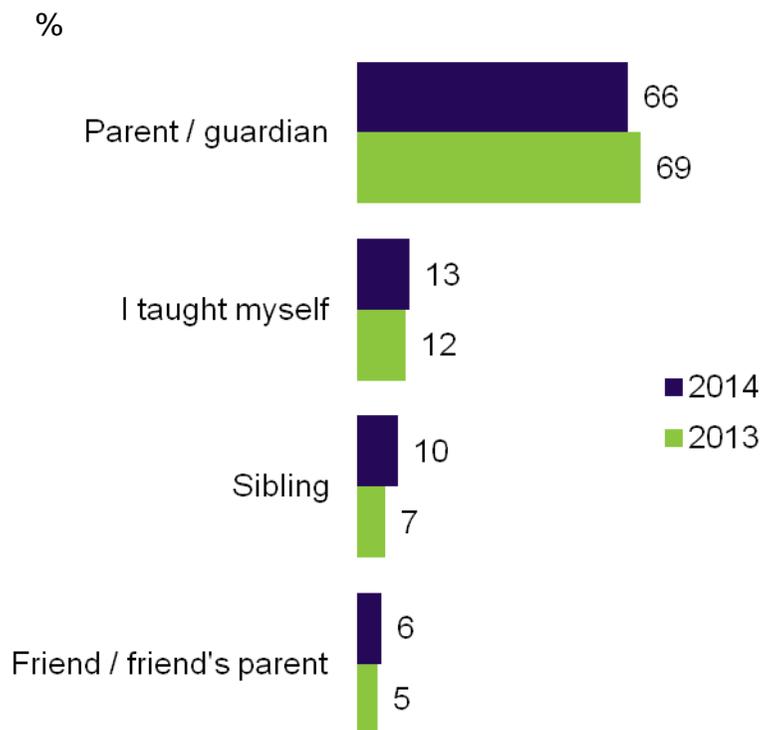
As in 2013, the majority of people learn to ride a bike when they under 10, and are taught by their parents

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



Mentions above 4% shown

No significant differences compared with 2013

C1: How old were you when you learned to ride a bike? Base: all who can ride a bike, excluding 'can't remember' – 2014 (1,149), 2013 (1,186)

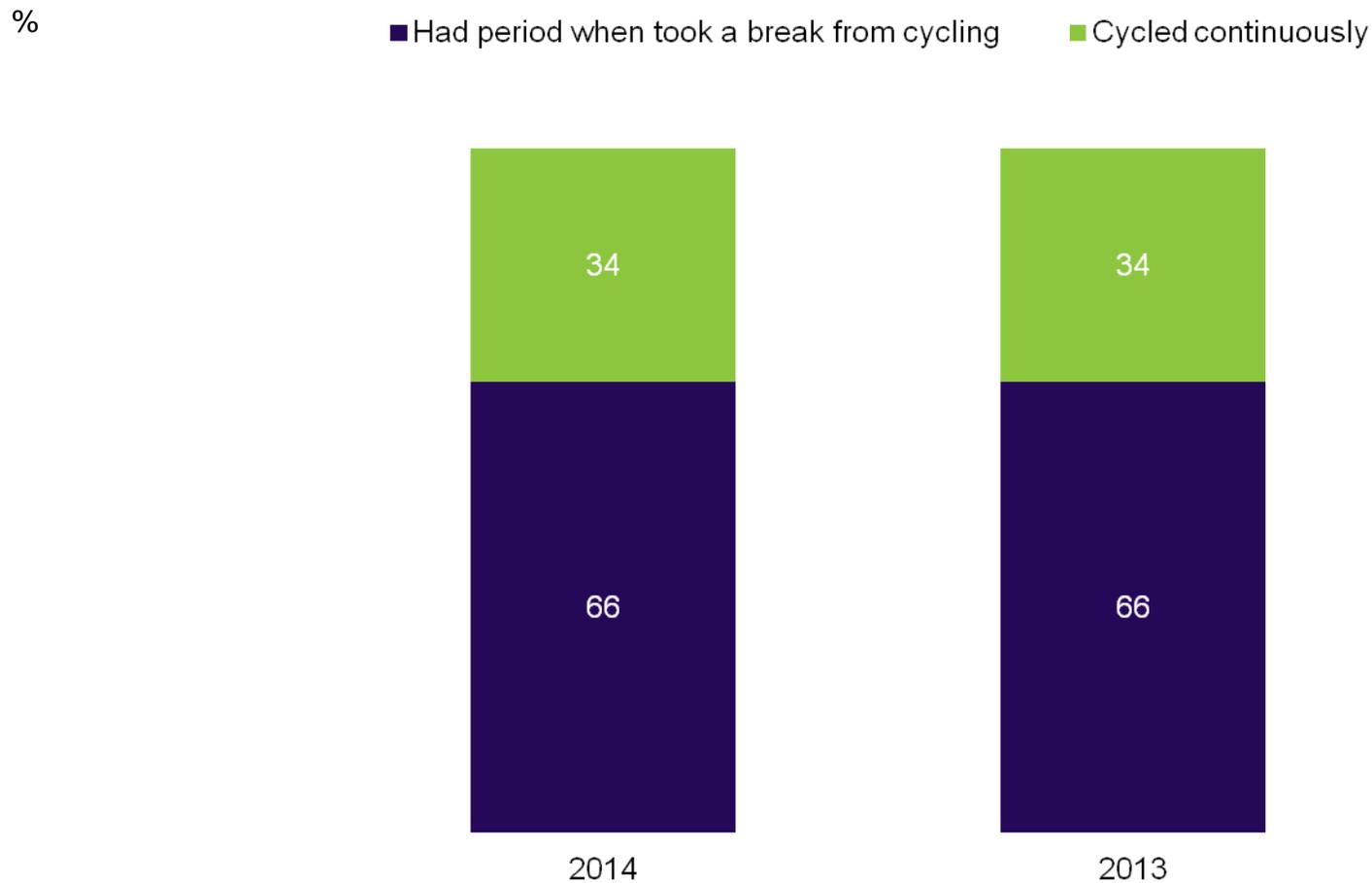
C2: Who taught you to ride a bike? Base: all who can ride a bike – 2014 (1,159), 2013 (1,208)



Two thirds have a break from cycling at some point for more than a year, consistent with the proportion in 2013

Taking a break from cycling

Whether cycled continuously or had a break from cycling



C3: 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 – 2014 (518), 2013 (532)

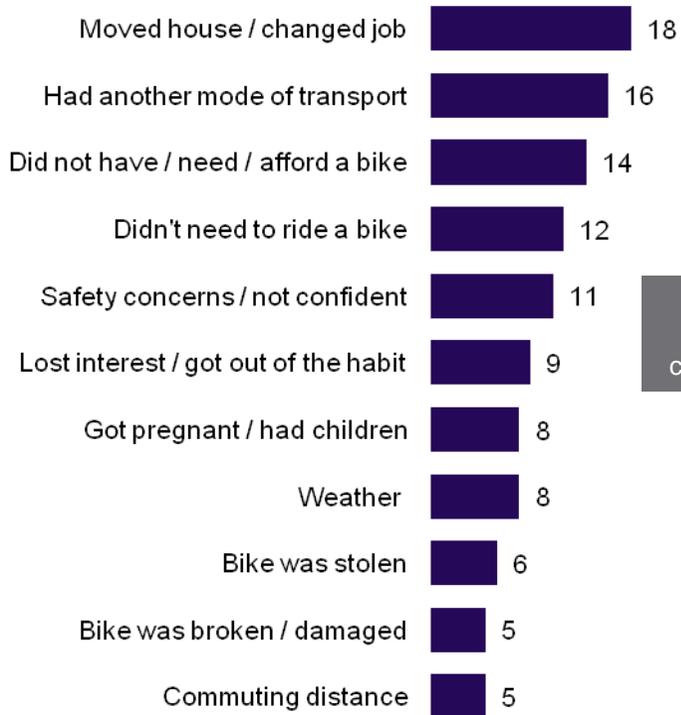


The most common reason for stopping cycling is a change of house or job, or using another mode of transport. The desire to get/stay fit and/or save money are most frequently cited reasons for starting to cycle again

Getting back in to cycling

Reasons for taking a break from cycling

%

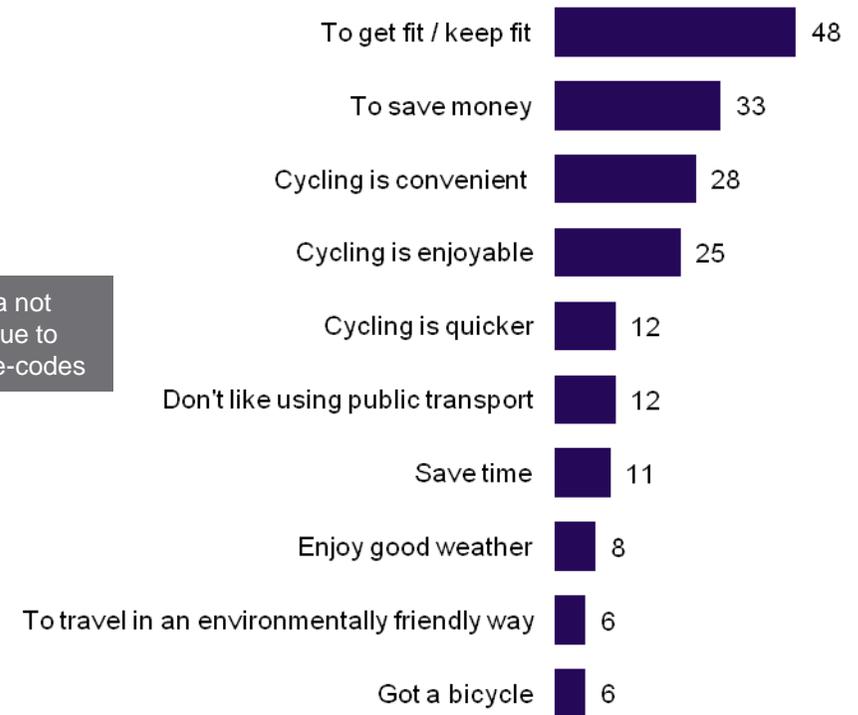


Trend data not available due to change of pre-codes

Mentions over 4% shown

Reasons to start cycling (again)

%



Mentions over 4% shown

C5: Why did you have a break from cycling? Base: All cyclists who have taken a break from cycling (339)

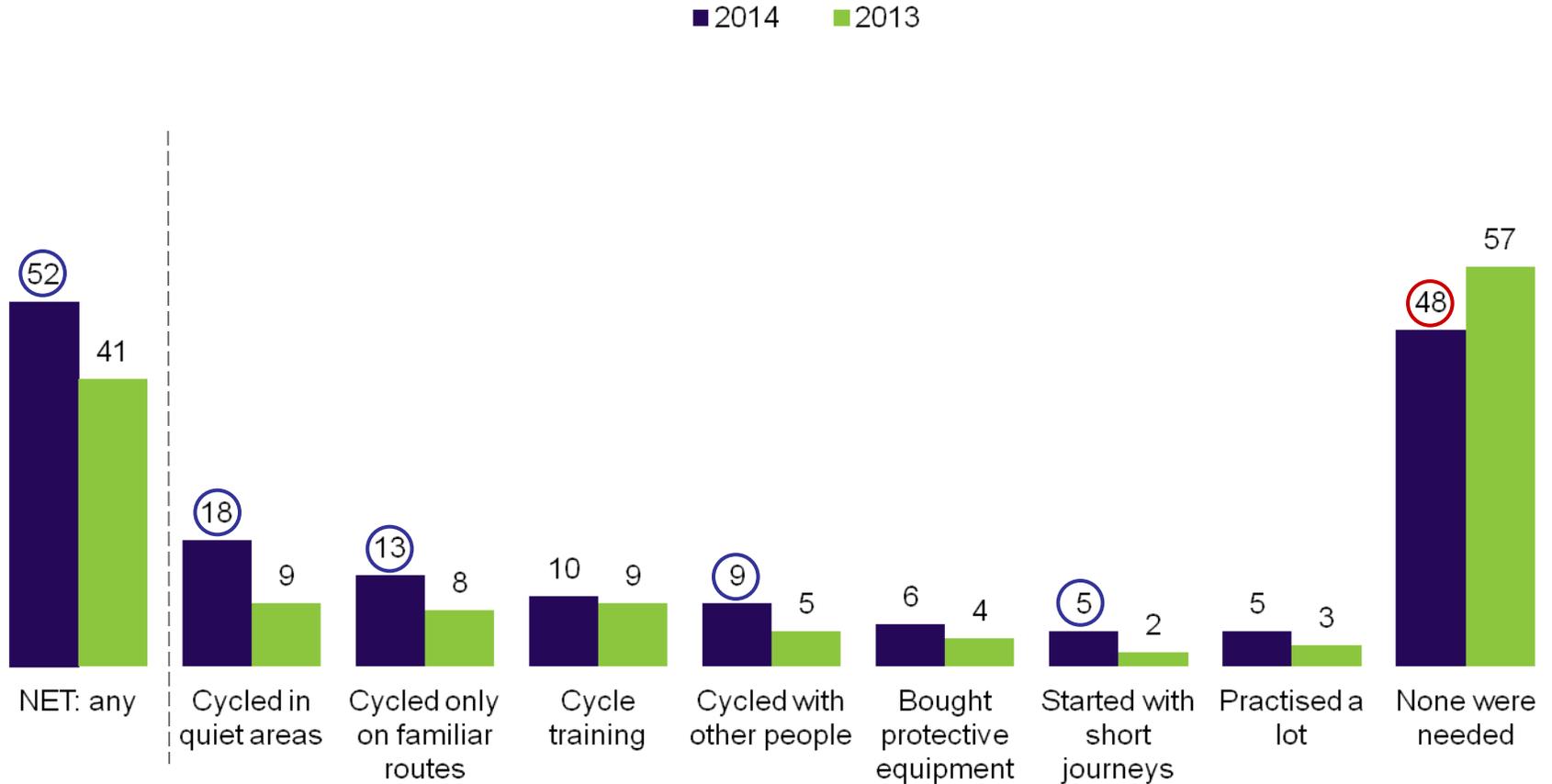
C6: What prompted you to start cycling? Base: All cyclists (518)



Compared with 2013, significantly more cyclists took steps to build their confidence before cycling (or taking it up again), generally by cycling in quiet / familiar areas

Steps taken to build up cycling confidence

%



Mentions over 4% shown

○ Significantly lower than 2013 ○ Significantly higher than 2013

C8: When you took up cycling, what steps, if any, did you take to build your confidence as a cyclist?

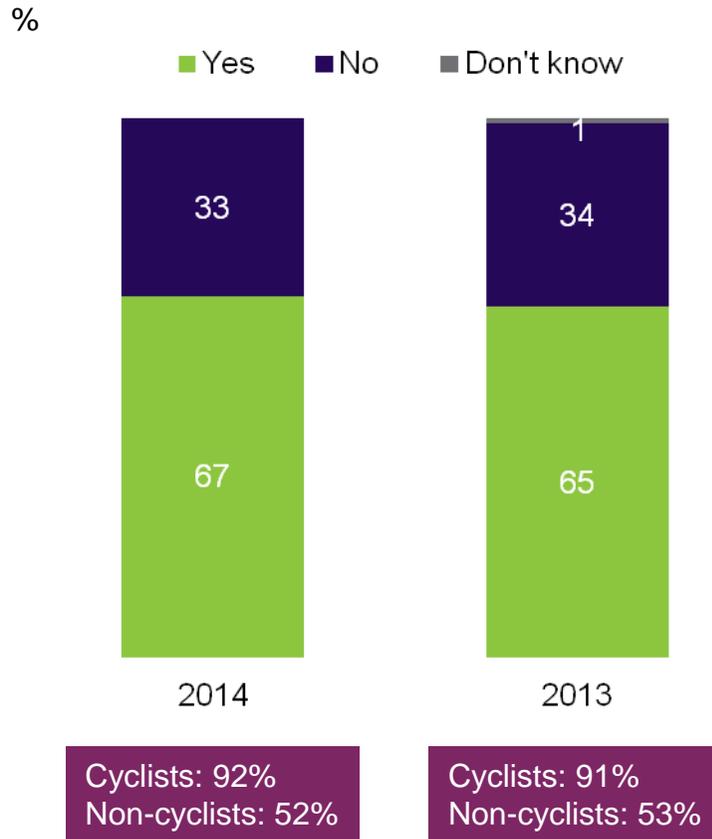
Base: All cyclists – 2014 (518), 2013 (532)



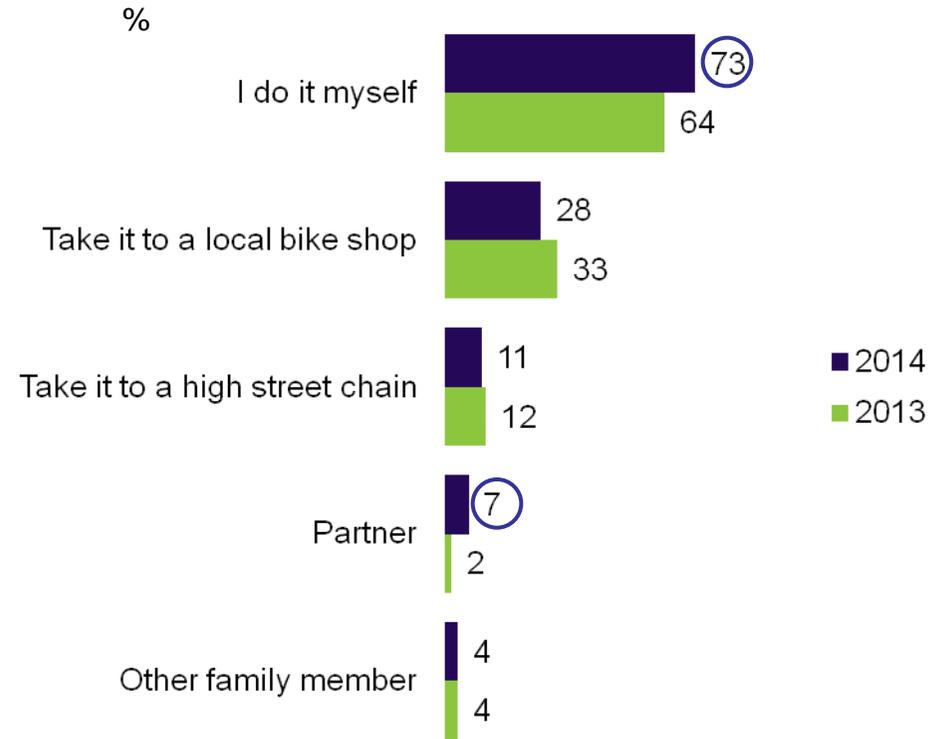
Two thirds of bike owners maintain their bike and three quarters do it themselves, a significant increase from last year

Bike maintenance

Do you maintain your bicycle?



How do you maintain the bicycle?



Mentions over 1% shown

Significantly higher than 2013

QMAINT1/MAINT2. Do you maintain the bicycle that you have access to? / How do you maintain the bicycle you have access to?

Base: all cycling at least monthly, or less but with household access to a bike – 2014 (818), 2013 (862) / all maintaining a bike – 2014 (624), 2013 (662)



Behaviour change





Behaviour change model - definitions

- The behaviour change model categorises cyclists and non-cyclists into broad behavioural groupings
- Londoners 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
- The behavioural groupings are based on responses to these statements, a full list of which is found on the next slide
- The statements do not represent a linear progression, and Londoners may move between any of the groups over time
- TfL has used a behaviour change model for some years, however in 2014 the question was revised
 - While this is likely to improve the functioning of the model going forward, it means that comparisons prior to 2014 are not possible



Behaviour change model - definitions

2014 was the first year this question wording was used for the behaviour change model so trend data is not available	Grouping	Proportion of <u>cyclists</u> (in last twelve months)	Proportion of <u>non-cyclists</u> (including 'not in the last 12 months')
You have never thought about it, but would be unlikely to start in the future	Pre-contemplation	-	39%
You have thought about it but don't intend starting in the future	Pre-contemplation	-	32%
You have never thought about it but could be open to it in the future	Pre-contemplation	3%	14%
You are thinking about starting soon	Contemplation	5%	8%
You have decided to start soon	Preparation	1%	<1%
You have tried to start recently, but are finding it difficult	Change	2%	-
You have started recently and are finding it quite easy so far	Change	2%	-
You started a while ago and are still doing it occasionally	Sustained change	33%	-
You started a while ago and are still doing it regularly	Sustained change	48%	-
You had started doing this but couldn't stick to it	Lapsed	5%	6%

B1: Which of the following would you say applies to you? When thinking about increasing the amount you cycle in London...

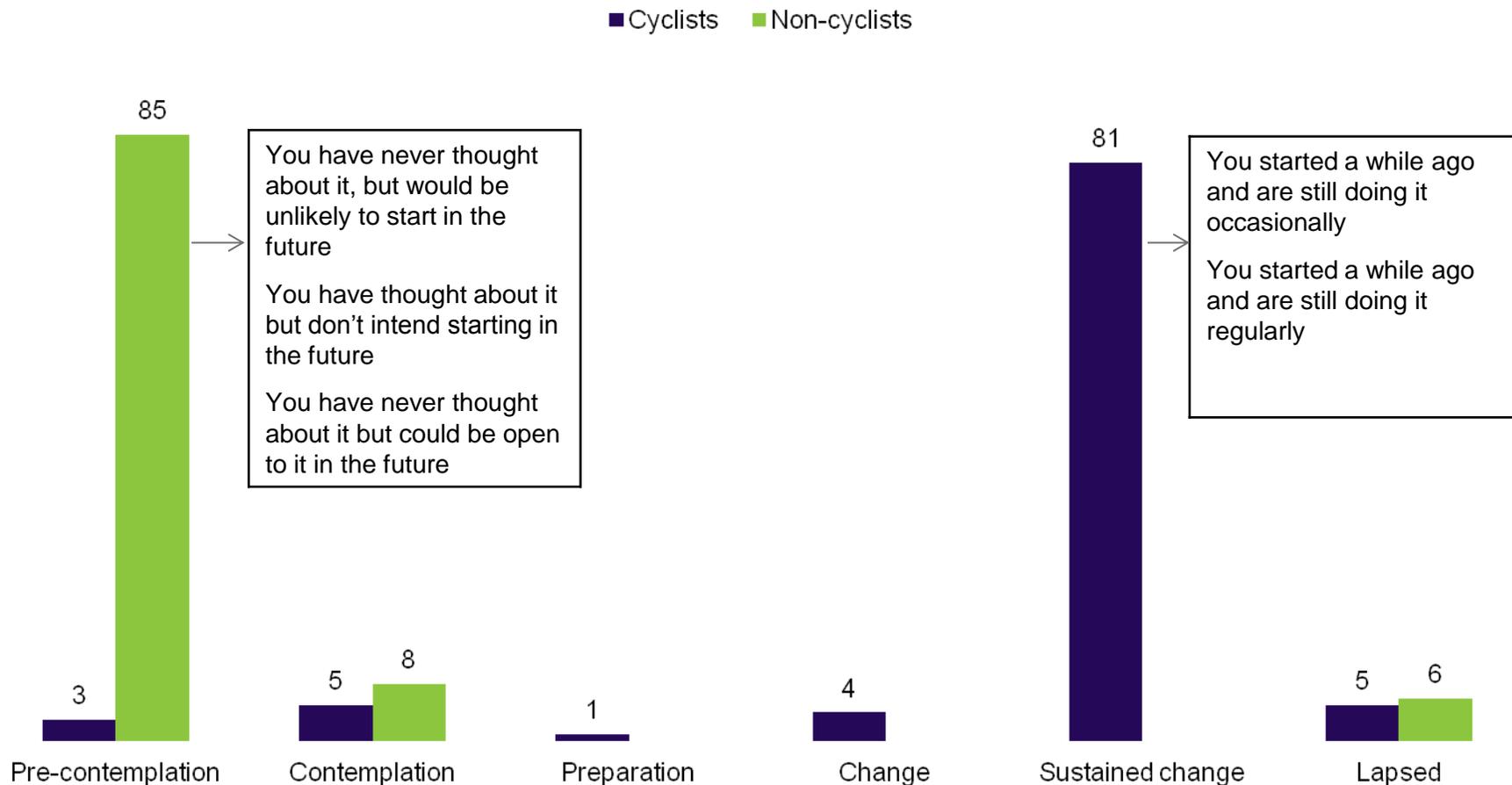
Base: all cyclists in the last 12 months (518) / all not cycled in the last 12 months (846)



Most cyclists self-classify as being in the 'sustained change' grouping, while most non-cyclists are in the 'pre-contemplation' grouping

Behaviour change model

%



B1: Which of the following would you say applies to you? When thinking about increasing the amount you cycle in London...

Base: All cyclists in the last 12 months (518) / all not cycled in the last 12 months (846)



Cyclists' attitudes towards cycling more

- 81% of cyclists are in the 'sustained change' category, meaning they 'started cycling a while ago and are still doing it either regularly or occasionally'.
- A small proportion (4%) are in a state of 'change', meaning they 'have tried to start cycling more recently, but are finding it difficult' or 'have started recently and are finding it quite easy so far'
- A small proportion (5%) are categorised as 'contemplating' i.e. thinking about cycling more soon



Non-cyclists' attitudes towards taking up cycling

- Most non-cyclists (85%) are in the 'pre-contemplation' category, meaning they:
 - 'Have never thought about taking up cycling, and are unlikely to start in the future'
 - 'Have thought about it but don't intend starting in the future'; or
 - 'Have never thought about it but could be open to it in the future'

- 8% of non cyclists are 'contemplating' or thinking about starting soon soon

- 6% are categorised as 'lapsed', meaning that they 'started cycling more, but couldn't stick to it'



Motivations and impact of cycling more

- For those planning to cycle more/take up cycling, fitness remains the key motivation. Saving money, enjoyment and convenience are also mentioned.
 - Though only 25% have taken practical steps to change their behaviour such as buying cycling clothes, making their bike more roadworthy, buying a bike or investigating cycling routes
- Safety concerns are the key barrier, particularly for non-cyclists (42% cyclists, 53% cyclists). For those who already ride, weather and traffic are also important barriers (25% and 23% respectively)
- Those cyclists planning to cycle more are most likely to substitute bus journeys with cycling (60%); followed by 46% who reported they would cycle instead of taking the Tube, 35% instead of a car, and 25% instead of the train
- For non cyclists, cycling would likely replace bus journeys (63% cited this), 57% car journeys, 25% Tube journeys and 15% train journeys



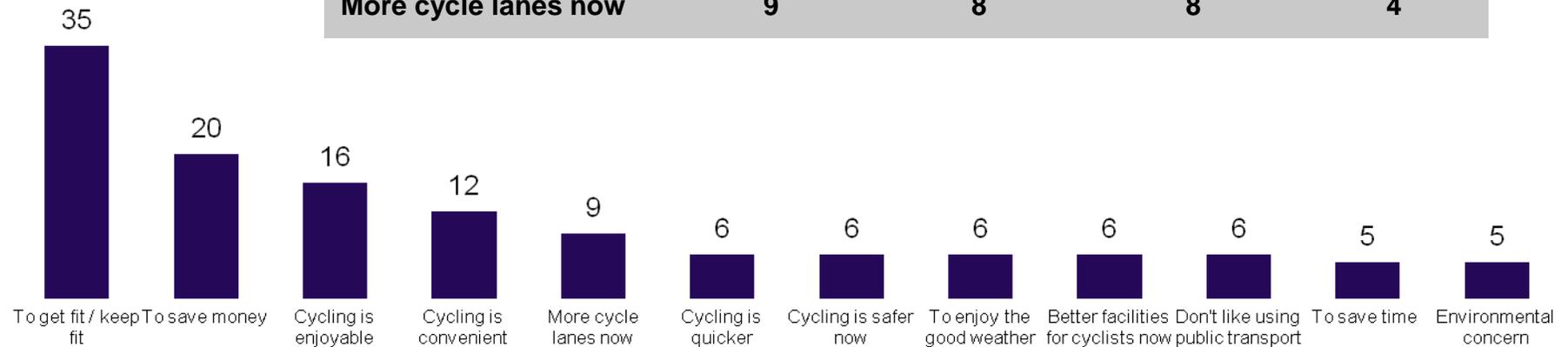
Keeping fit and saving money remain the main motivations for considering cycling more, though more cyclists than before are thinking of the enjoyment and convenience factors

Motivations for considering cycling more

Note: no significant differences between regular and occasional cyclists

%

Top five motivators	2014	2013	2012	2011
To keep fit	35	44	52	54
To save money	20	33	17	39
It is enjoyable	16	-	7	3
It is convenient	12	-	4	2
More cycle lanes now	9	8	8	4



Mentions over 4% shown

35 Significantly lower than 2013

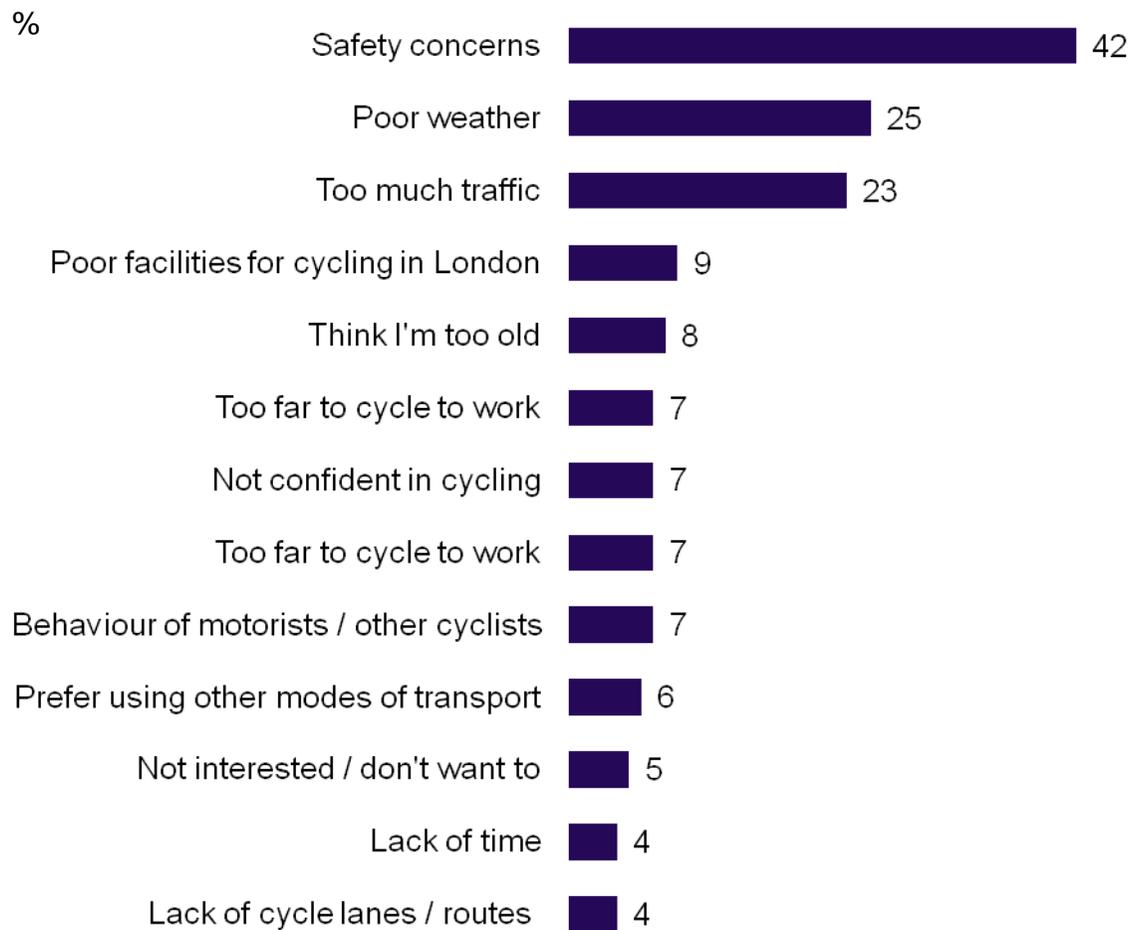
E3: What is making you actively consider cycling more in London?
 Base: all who have cycled in the last 12 months and are planning to cycle more (489)



Cyclists are most likely to be put off cycling more by safety concerns, followed by poor weather and the amount of traffic

Deterrents to cycling more

Note: no significant differences between regular and occasional cyclists



Trend data not available due to changes to the behaviour change model question

Mentions over 3% shown

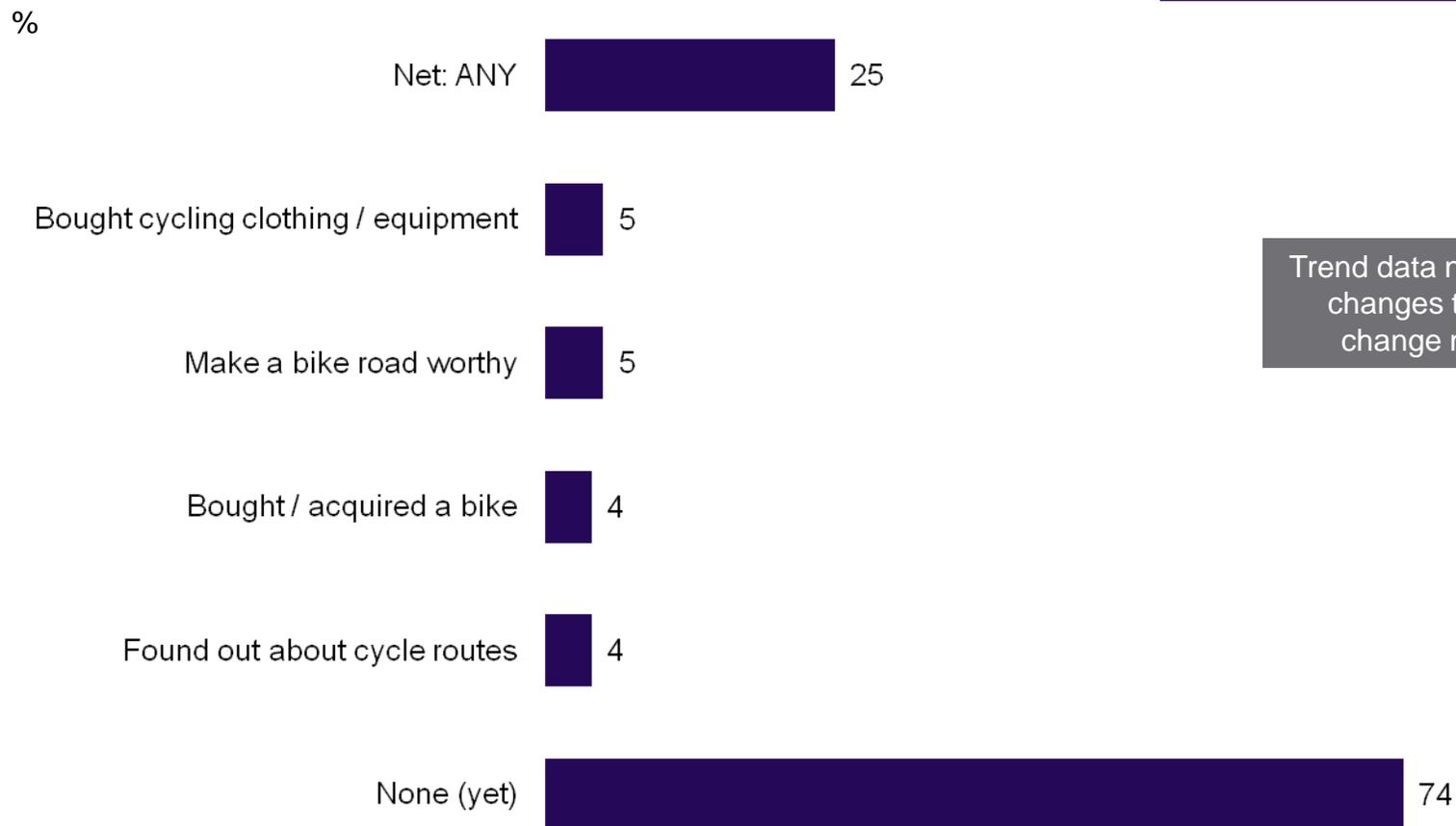
E7: What deters you from cycling more?
Base: all cyclists (518)



Among those who are planning to cycle more, only a quarter have taken concrete steps to do so, such as buying clothing or equipment

Steps taken towards cycling more

Note: no significant differences between regular and occasional cyclists



Trend data not available due to changes to the behaviour change model question

Mentions over 3% shown

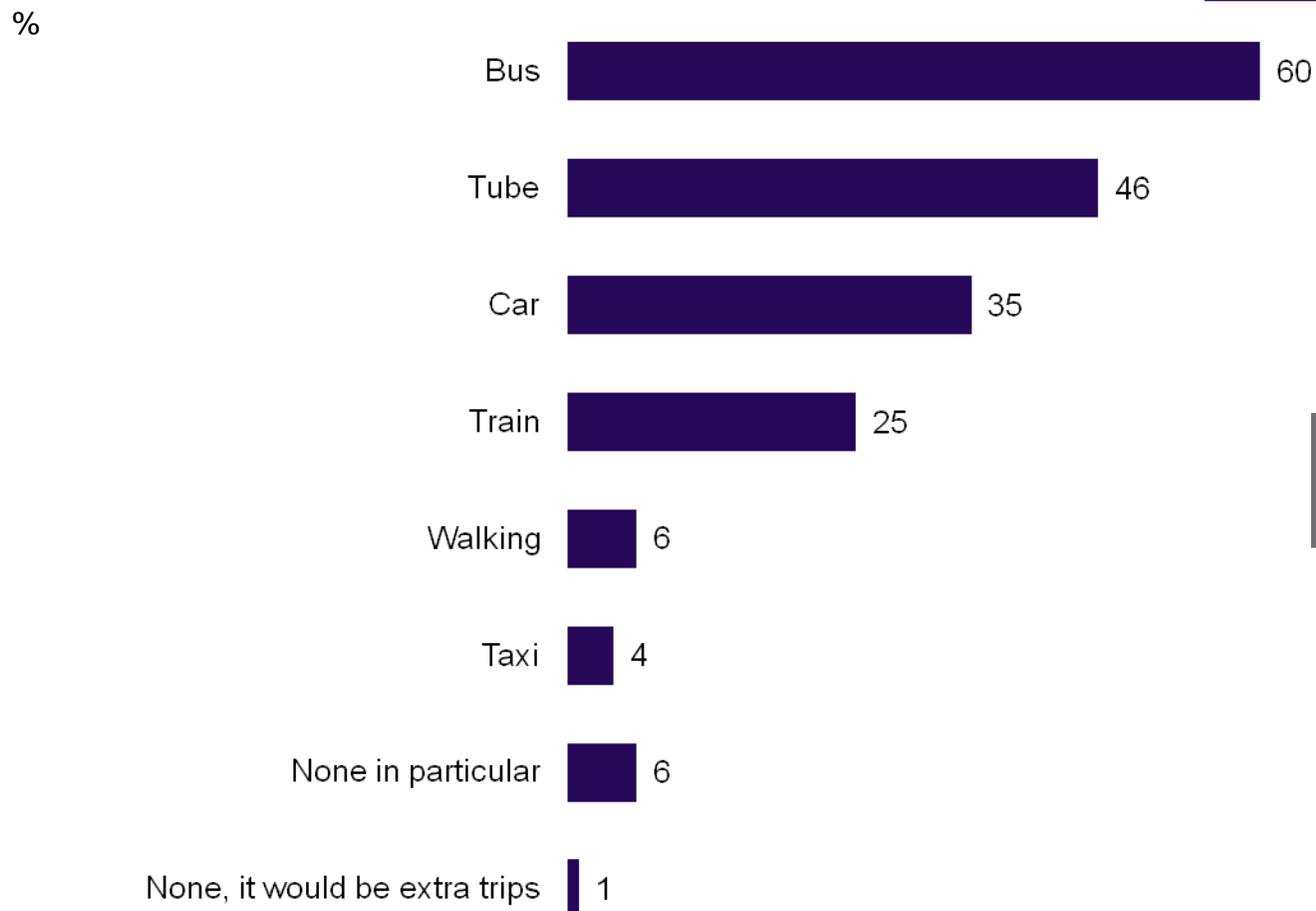
E1: What practical steps, if any, have you taken towards cycling more in the next 12 months?
Base: all cyclists in the last 12 months planning to cycle more (489)



Among cyclists planning to cycle more, most say they would use the bus less if so

Potential modal shift

Note: no significant differences between regular and occasional cyclists



Trend data not available due to changes to the behaviour change model question

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

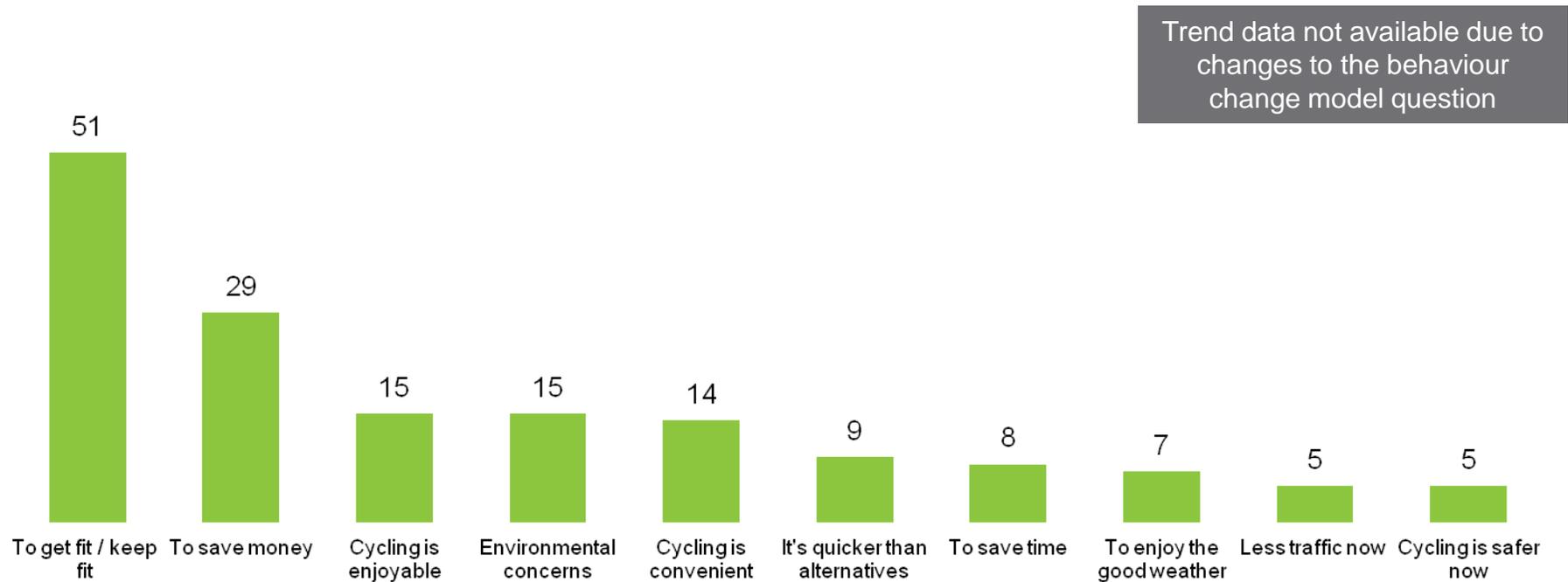
Base: all cyclists in the last 12 months planning to cycle more (489)



Among non-cyclists, getting or keeping fit is the main motivation for taking up cycling, followed by saving money

Motivations for considering taking up cycling

%



Mentions over 4% shown

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

Base: all who have not cycled in the last 12 months and now intend to 'take up cycling' (132)



The key barriers deterring non-cyclists from taking it up are safety concerns and the amount of traffic

Deterrents to taking up cycling



Trend data not available due to changes to the behaviour change model question

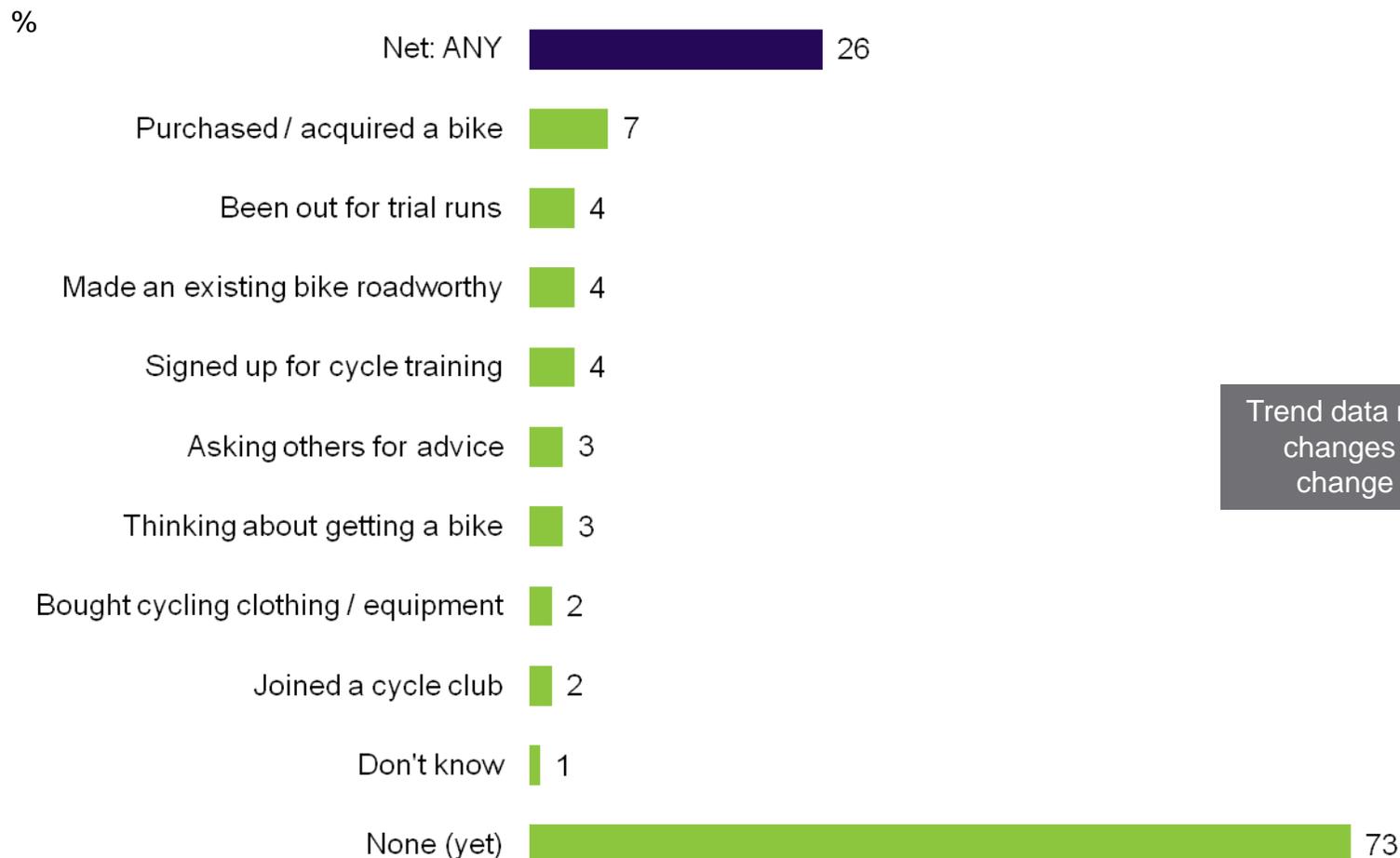
Mentions over 4% shown

E7: What deters you from taking up cycling?
Base: all non-cyclists (846)



Only a quarter of non-cyclists who intend to take up cycling have taken any practical steps, most notably acquiring a bike

Steps taken towards taking up cycling



Trend data not available due to changes to the behaviour change model question

Mentions over 1% shown

E1: What practical steps, if any, have you taken towards taking up cycling in the next 12 months?

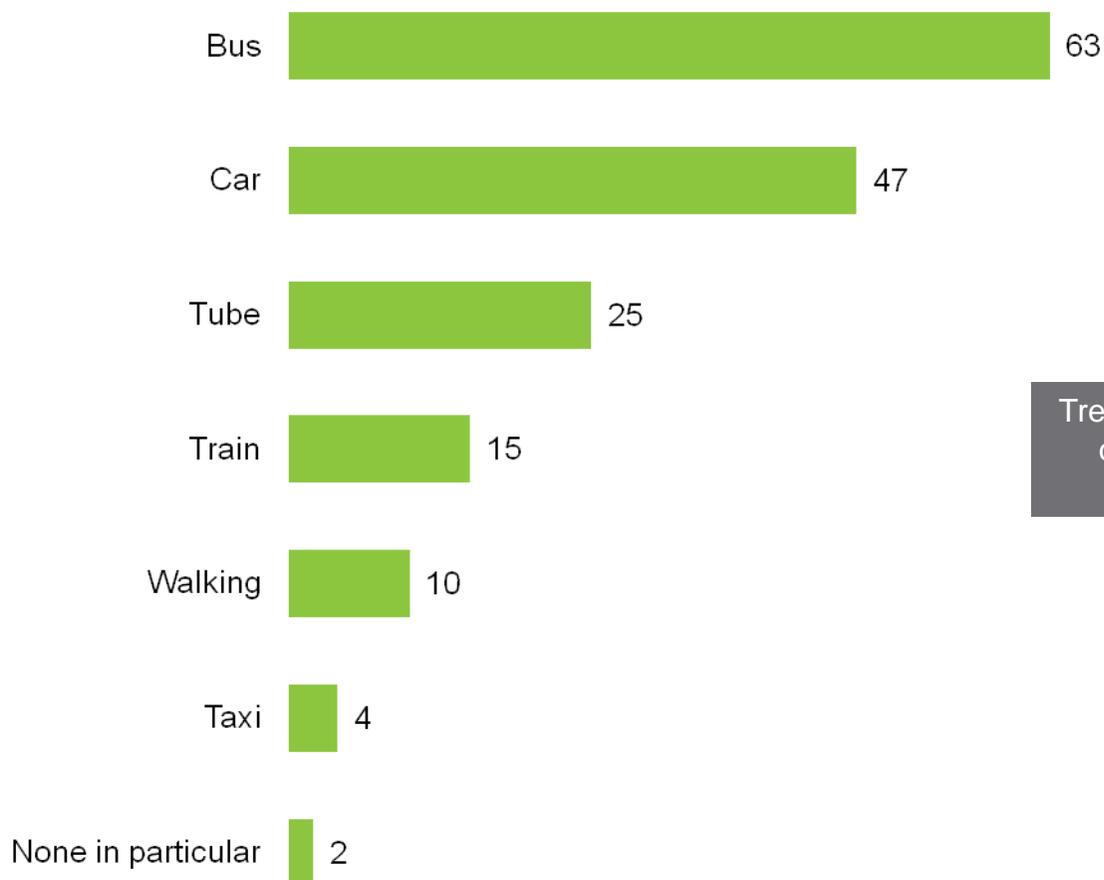
Base: all who have not cycled in the last 12 months and now intend to 'take up cycling' (132)



If they took up cycling, nearly two thirds of non-cyclists would be inclined to use the bus less, while almost half would use the car less

Potential modal shift

%



Trend data not available due to changes to the behaviour change model question

E5: What type of transport, if any, would you use less if you take up cycling?
Base: all who have not cycled in the last 12 months and now intend to 'take up cycling' (132)



Motivations





Motivations

- As reported last year, cycling within the Capital only appeals to one third of Londoners, while half the population find it unappealing
- Cycling in London is even unappealing to some current cyclists – 24% find it so
- Among current cyclists, cycling within the local area continues to hold the most appeal (76% find this journey appealing). However cycling outside the local area and certainly within central London are seen as less attractive journeys, where more than half view these journeys as unappealing
- As to be expected, regular cyclists feel much more positively towards the different types of journeys made by cycling, though a significant proportion (39%) consider cycling within Central London unappealing



Perceptions

- The vast majority of Londoners agree that cycling is both enjoyable and becoming more popular
- Cycling is also becoming more sociable and more socially attractive; 82% agree it's a social activity compared with 77% in 2013 and 61% agree they would want to be seen cycling compared with 57% a year ago
- Convenience is another positive association Londoners have with cycling.
 - Most (84%) agree it's a convenient way to get around London, it's the fastest way to travel short distances (80%) and it get's you to your destination when you expect to arrive (76%)
- However the negative perceptions of cycling continue to affect Londoners' cycling behaviour
 - Only a minority of Londoners (25%) perceive cycling in London to be safe, feel confident cycling on London roads (21%)
 - And the majority agree that traffic makes people afraid of cycling on London streets (92%), and believe that cyclists are vulnerable to other road users (94%)

→ Attitudes towards cyclists

- The majority (86%) continue to agree that cyclists are 'fit and healthy', and this is thought their most positive attribute by some margin
- A significant proportion (41%) consider cyclists to be dangerous. There has also been a downward shift in the proportion of Londoners who perceive cyclists to be considerate (38%) and law abiding (35%)



Men, younger Londoners and BAME Londoners are most likely to find cycling within London appealing, as are cyclists

Appeal of cycling in London



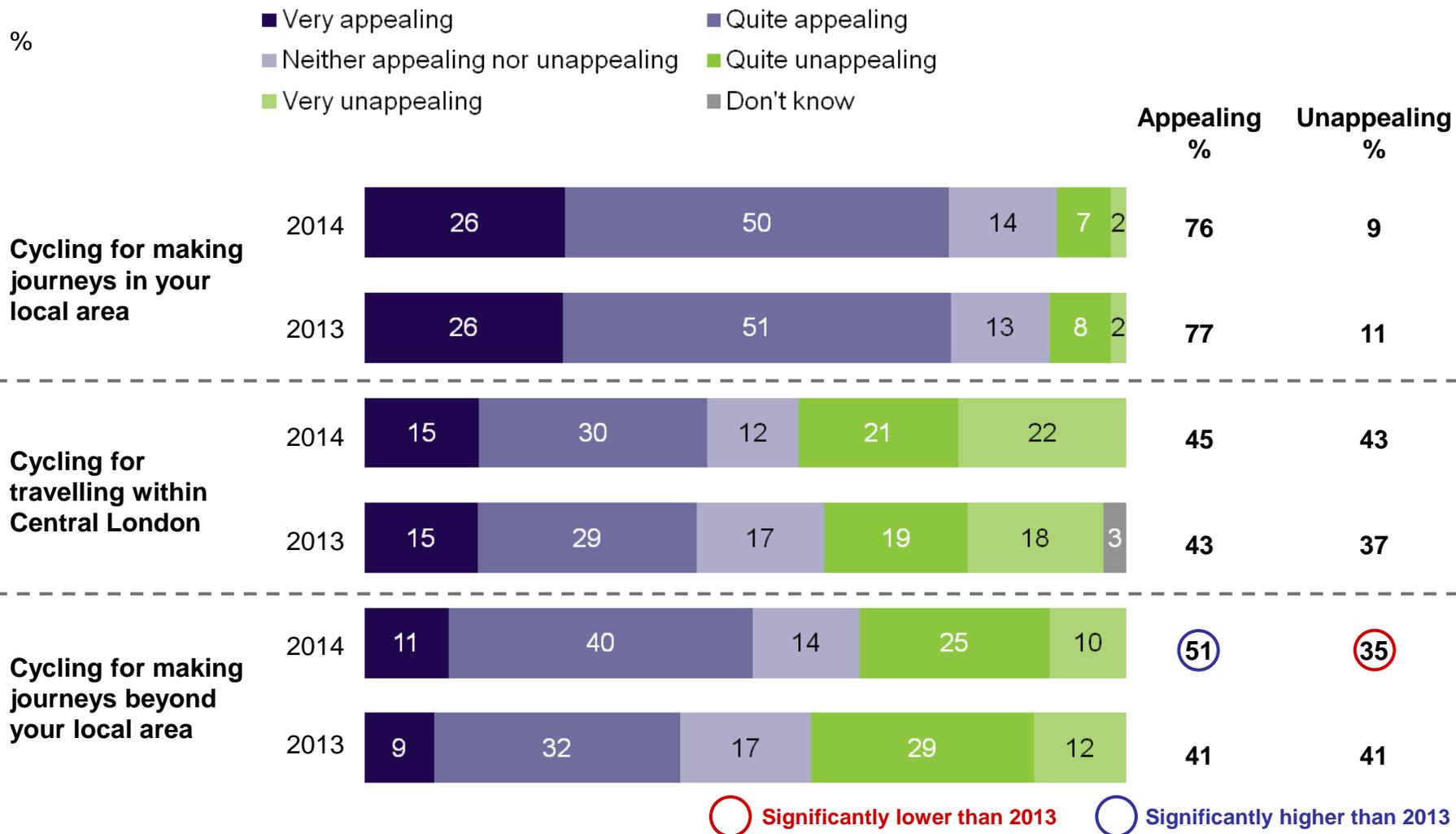
NB 'neutral' and 'don't know' ratings not shown

A4: Could you please tell me how appealing or unappealing you find cycling within London? Base: all – 2014 (1,364), 2013 (1,373)



This year has seen a significant increase in the proportion of cyclists that find cycling beyond their local area appealing

Appeal of cycling in specific scenarios - cyclists



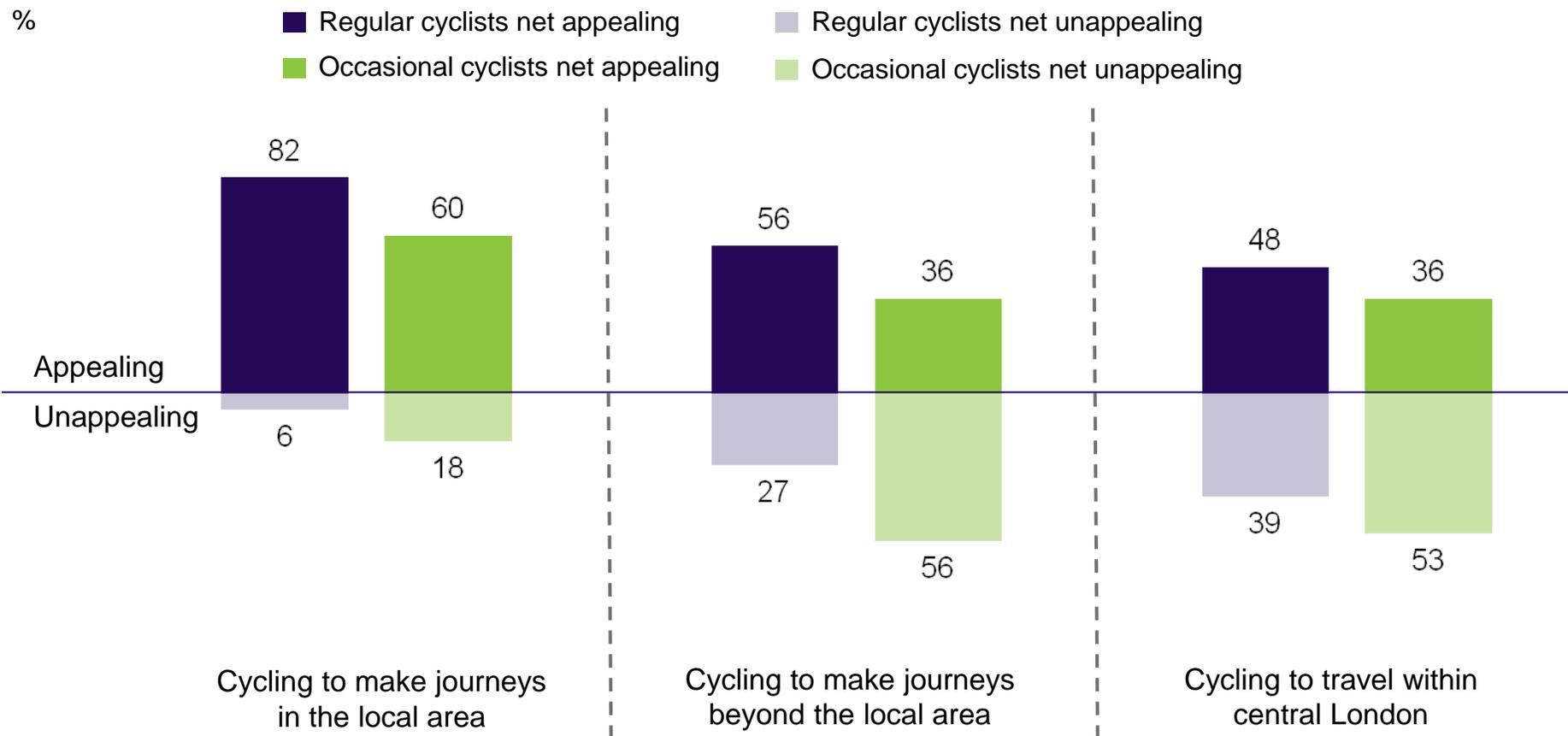
A5: Thinking specifically about cycling, can you please tell me how appealing or unappealing you find it for XXX. Do you find it ...?

Base: all cyclists who don't find the idea of cycling very unappealing – 2014 (485), 2013 (500)



Journeys are generally more appealing to regular cyclists; among occasional cyclists more than half find cycling beyond their local area or in central London unappealing

Appeal of cycling in specific scenarios – cyclists



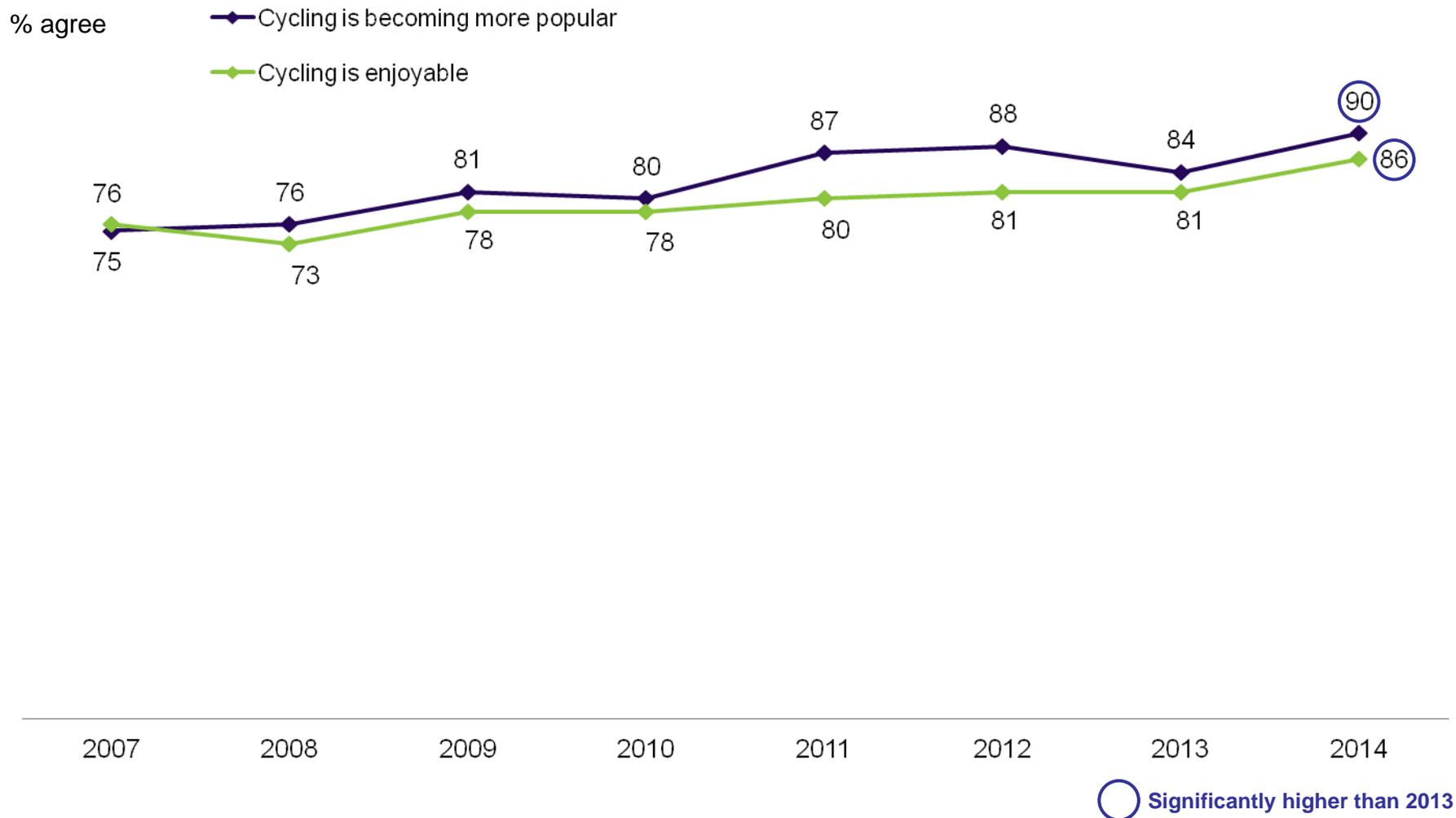
A5: Thinking specifically about cycling, can you please tell me how appealing or unappealing you find it for XXX. Do you find it ...?

Base: regular cyclists (374) and occasional cyclists (111)



Most Londoners agree that cycling is enjoyable, and becoming more popular; increasingly so, as this year's ratings are the highest since the survey began

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 - 2014 (1,364), 2013 (1,373), 2012 (1,326), 2007-2011 (c. 1,000)

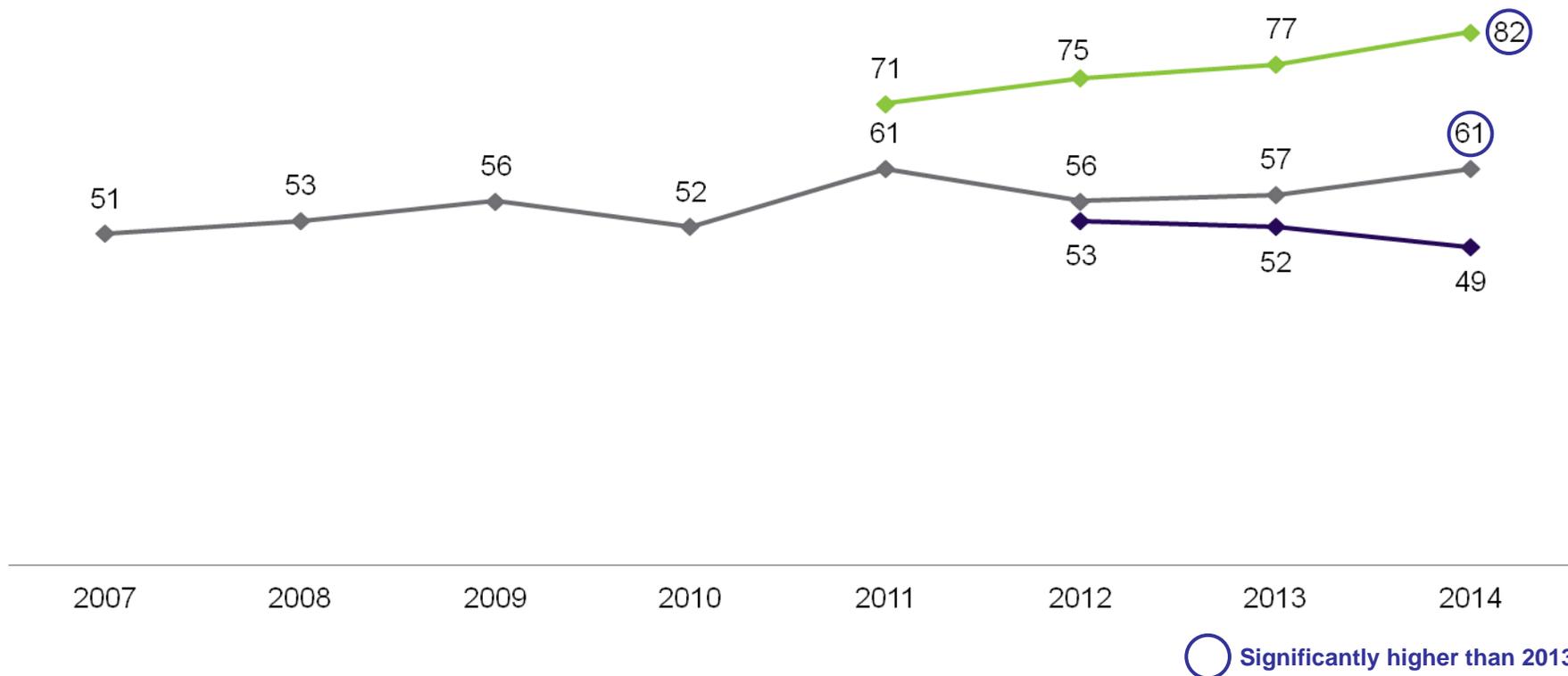


Around half agree that cycling is a mode of transport they would use and/or recommend, and increasing proportions agree it to be a good social activity and one that they would want to be seen using

Social factors

% agree

- ◆ Cycling is a good social activity (first asked June 2010)
- ◆ Cycling is a method of transport that you would want to be seen using
- ◆ Cycling is a method of transport that I would use and/or recommend (first asked 2012)



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 – 2014 (1,364), 2013 (1,373), 2012 (1,326), 2007-2011 (c. 1,000)

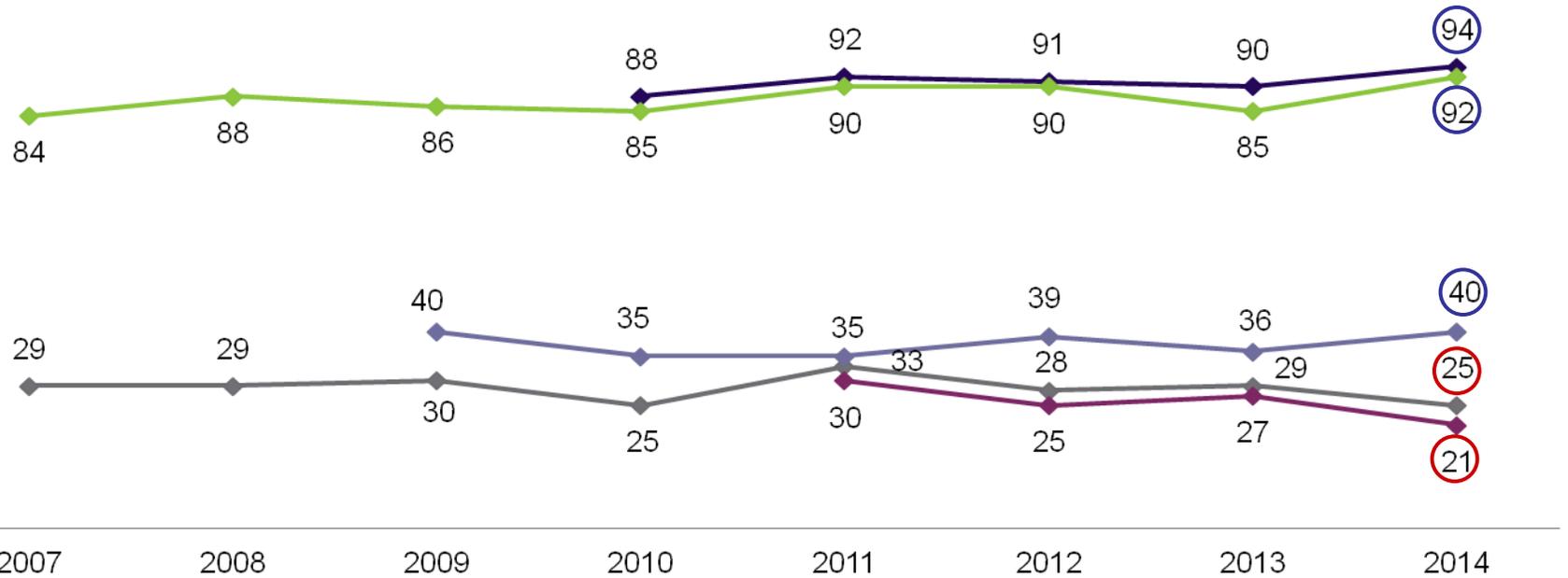


Increasing numbers of Londoners agree about certain hazards and safety concerns, for example this year 94% agree that traffic makes people afraid of cycling in the Capital

Confidence factors

% agree

- ◆ Cyclists are vulnerable to other road users (first asked March 2010)
- ◆ Traffic makes people afraid of cycling on London streets
- ◆ Cycling is a safe way of getting about
- ◆ I feel confident cycling on London's roads (first asked Jun 10; first reported 2011)
- ◆ Cycling is not for people like me (first asked 2009)



○ Significantly lower than 2013 ○ Significantly higher than 2013

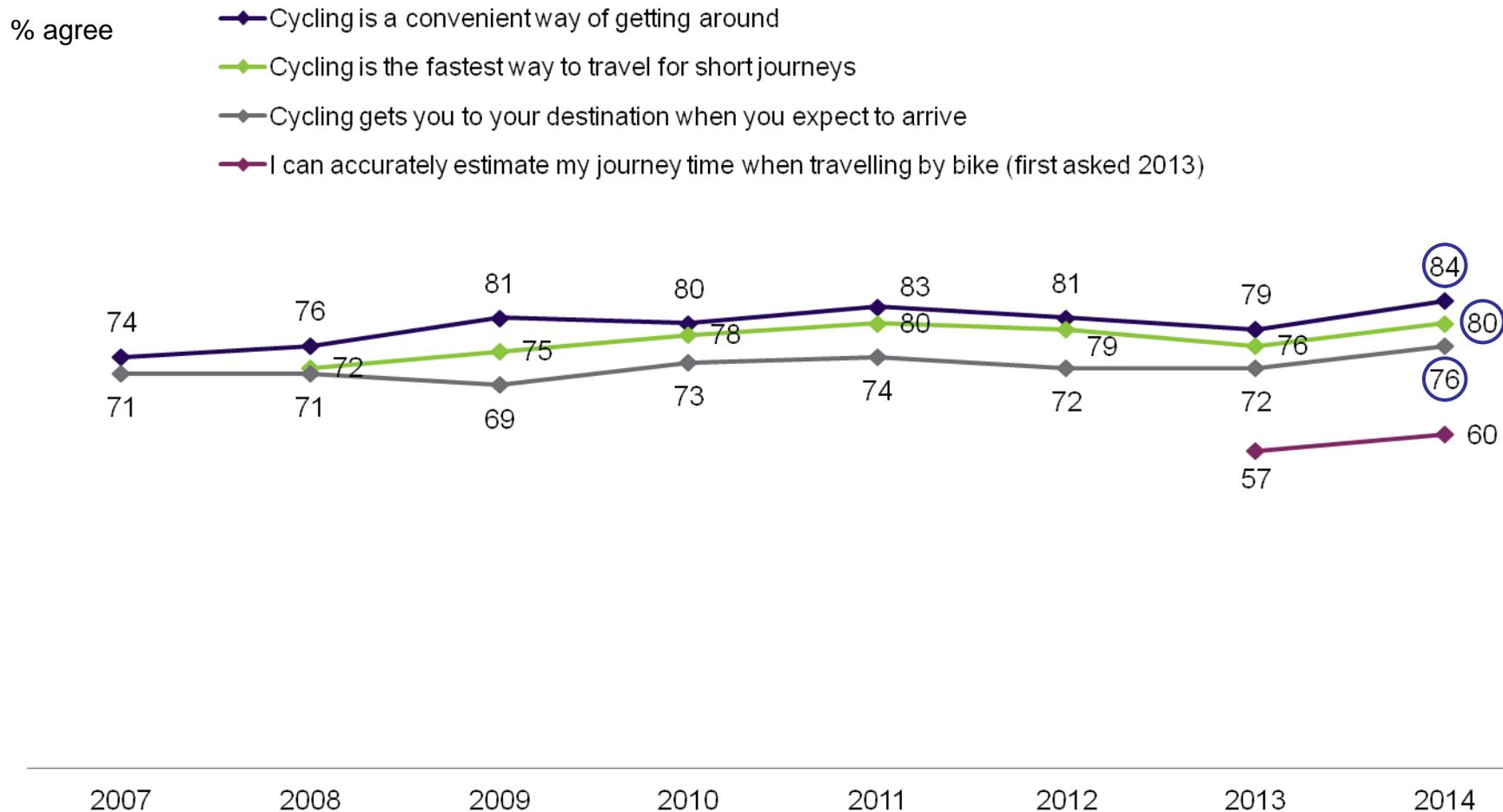
C2: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All - 2014 (1,364), 2013 (1,373), 2012 (1,326), 2007-2011 (c. 1,000)



Cycling continues to be viewed as convenient, fast and reliable for the majority of Londoners, with ratings at record highs this year

Convenience factors



○ Significantly higher than 2013

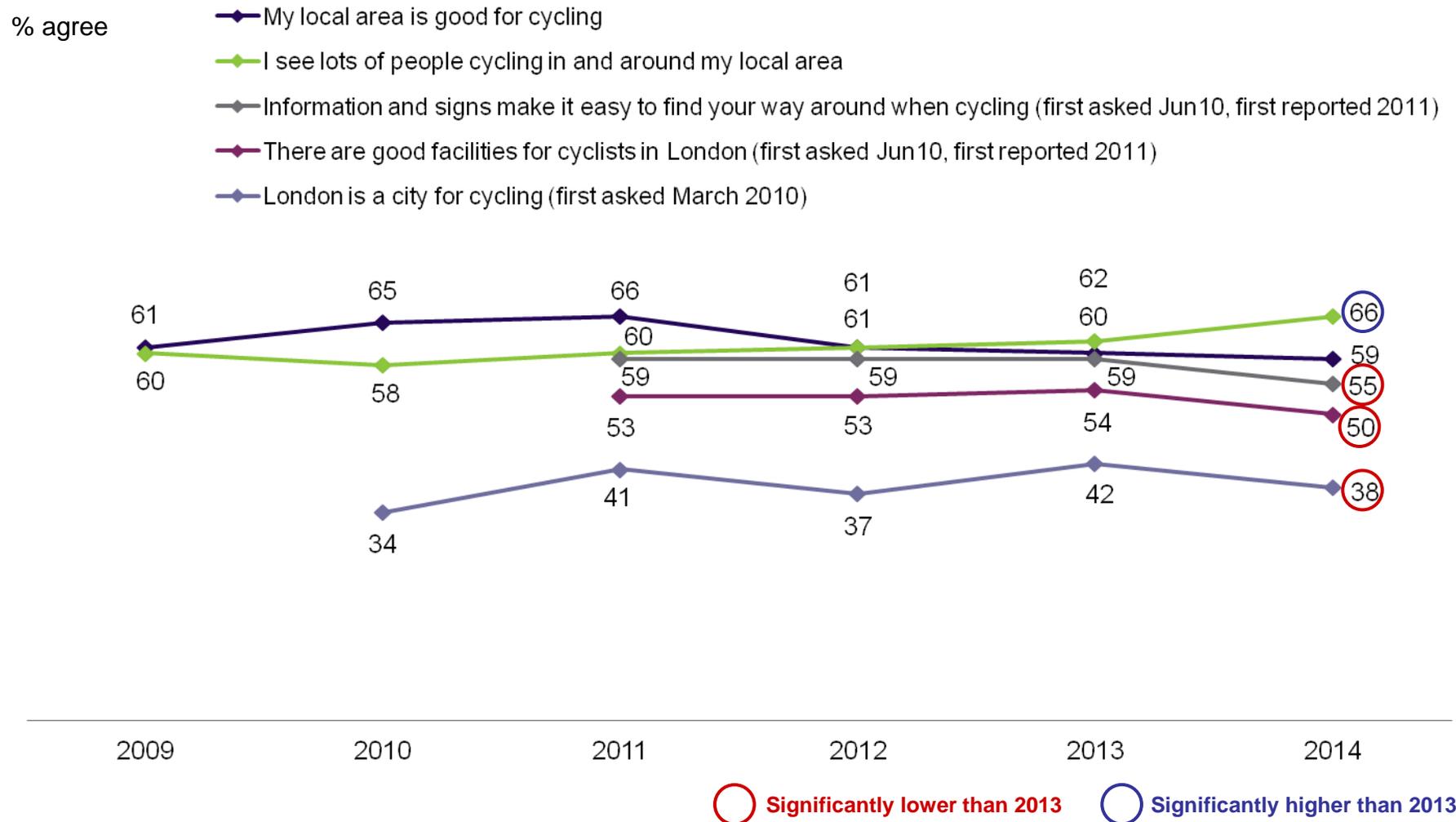
A1: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – 2014 (1,364), 2013 (1,373), 2012 (1,326), 2007-2011 (c. 1,000)



Ratings for the provision of information, signage and facilities have fallen this year, which could in turn be contributing to fewer people agreeing that London is a city for cycling, after a rise in 2013

Facility factors



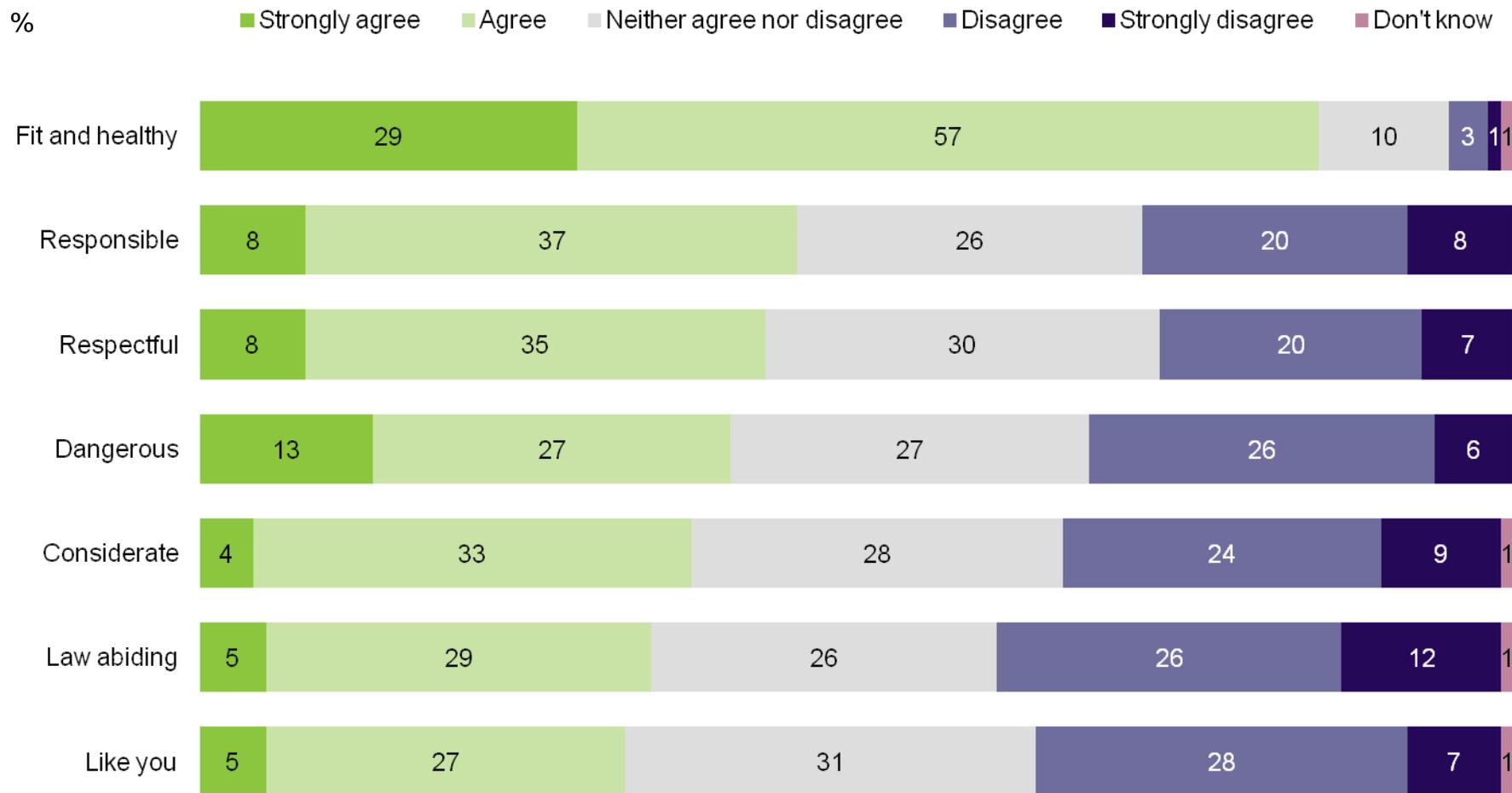
QC2: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All - 2014 (1,364), 2013 (1,373), 2012 (1,326), 2007-2011 (c. 1,000)



Most Londoners perceive cyclists to be fit and healthy, and over four in ten feel they are responsible and respectful. Conversely, 40% feel they are dangerous

Attitudes towards cyclists



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

Base: All (1,364)



By comparison with 2013, fewer Londoners feel cyclists are considerate, responsible or like them. While four in ten feel they are dangerous, this has not changed since last year

Attitudes towards cyclists

% 'agree' or 'agree strongly'	2014	2013	2012	2011	2010
Fit and healthy	86	86	85	84	84
Responsible	45	51	n/a	n/a	n/a
Respectful	43	46	n/a	n/a	n/a
Dangerous	41	42	47	42	51
Considerate	38	44	45	46	39
Law abiding	35	38	42	41	36
Like you	32	37	40	37	38

 Significantly lower than 2013

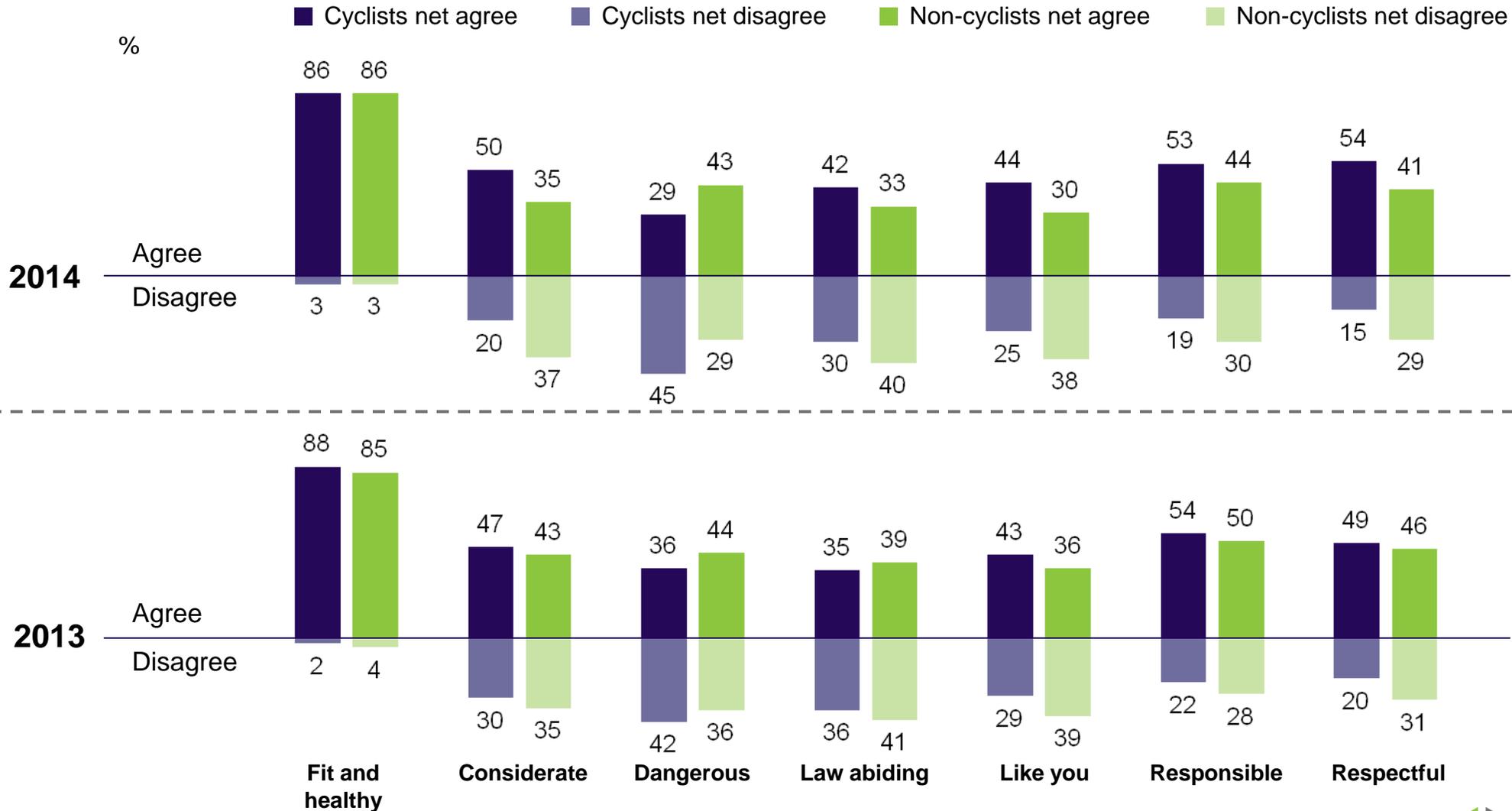
H1: Do you feel that cyclists in general are...?

Base: All – 2014 (1,364), 2013 (1,373), 2012 (1,326), 2007-2011 (c. 1,000)



Non cyclists' views of cyclists have deteriorated this year with a smaller proportion thinking they are considerate, law abiding or responsible

Cyclists and non-cyclists

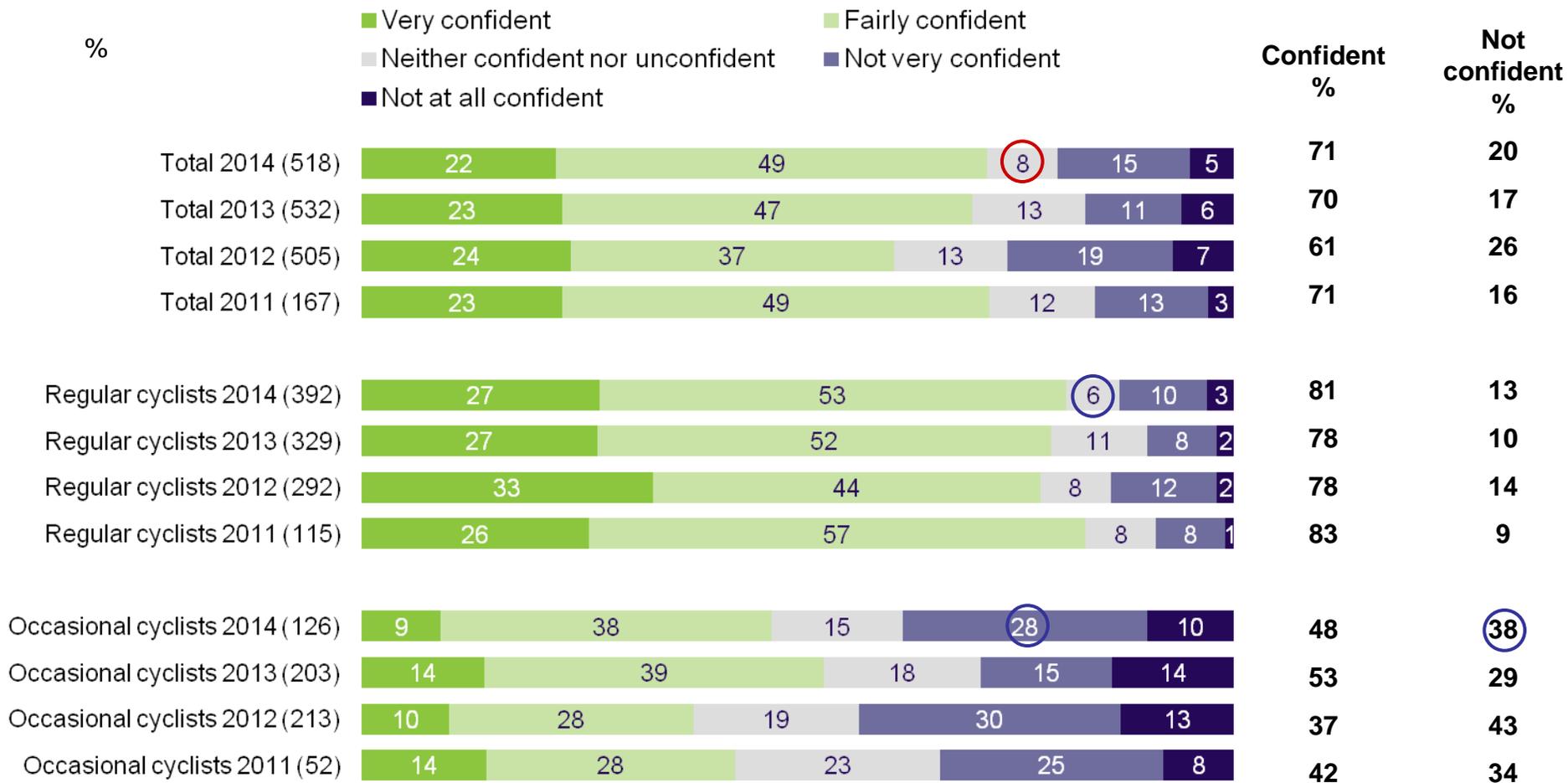


H1: Do you feel that cyclists in general are ...? Base 2014: all cyclists (518), all non-cyclists (846); Base 2013: all cyclists (532), all non-cyclists (841)



Overall confidence has remained more or less on a par with 2013, though a larger proportion of occasional cyclists feel less confident this year

Confidence cycling on London's streets



○ Significantly lower than 2013 ○ Significantly higher than 2013

J1: Generally, how confident do you feel cycling on London's roads?
 Base: Those who have cycled around London within the last 12 months (518)



Barriers





Barriers

Safety

- When asked to rank the key deterrents for cycling in London, 80% ranked concerns about safety as the number one barrier
- Cyclists, both regular and occasional, feel significantly safer when cycling in traffic than when cycling on busy roads
- However, there is evidence that occasional cyclists are becoming more confident on the roads.
 - 88% feel safe cycling in traffic compared to 75% in 2013
 - 44% feel safe cycling on busy roads in general compared to 33% in 2013

Infrastructure

- Though the availability of information on cycling routes and advance stop signs in London is perceived as 'good' by half of all Londoners, a significant minority, one in five, rated these aspects as poor
- Around half of cyclists attributed poor ratings to the availability of cycling lanes, cycle racks, bike security, and the safety of cycling

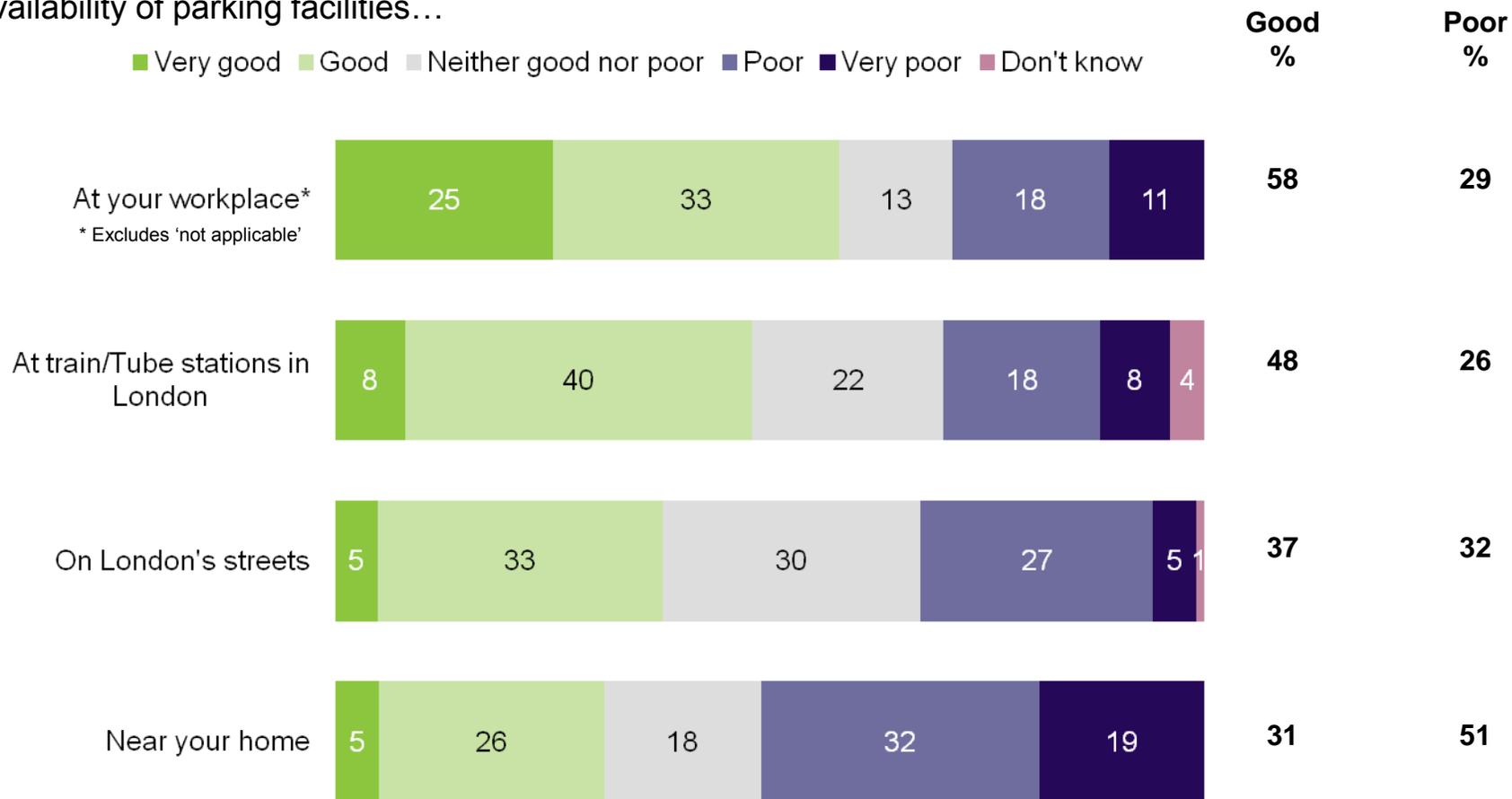


Over half of cyclists rate the availability of cycle racks at work as good, but elsewhere, especially near their home, this falls to less than a third

Rating of cycle racks facilities

%

Availability of parking facilities...



A2: How would you rate the following aspects of cycling in London? Base: All cyclists (518)



Ratings for the availability of parking facilities at their workplace or on London's streets as have fallen this year

Rating of cycle rack facilities (trend)

%

Availability of parking facilities...

	Good		Poor	
	2014	2013	2014	2013
At your workplace* *excludes not applicable	58	66	29	25
At train/Tube stations in London	48	42	26	30
On London's streets	37	44	32	27
Near your home	31	32	51	51

 Significantly lower than 2013

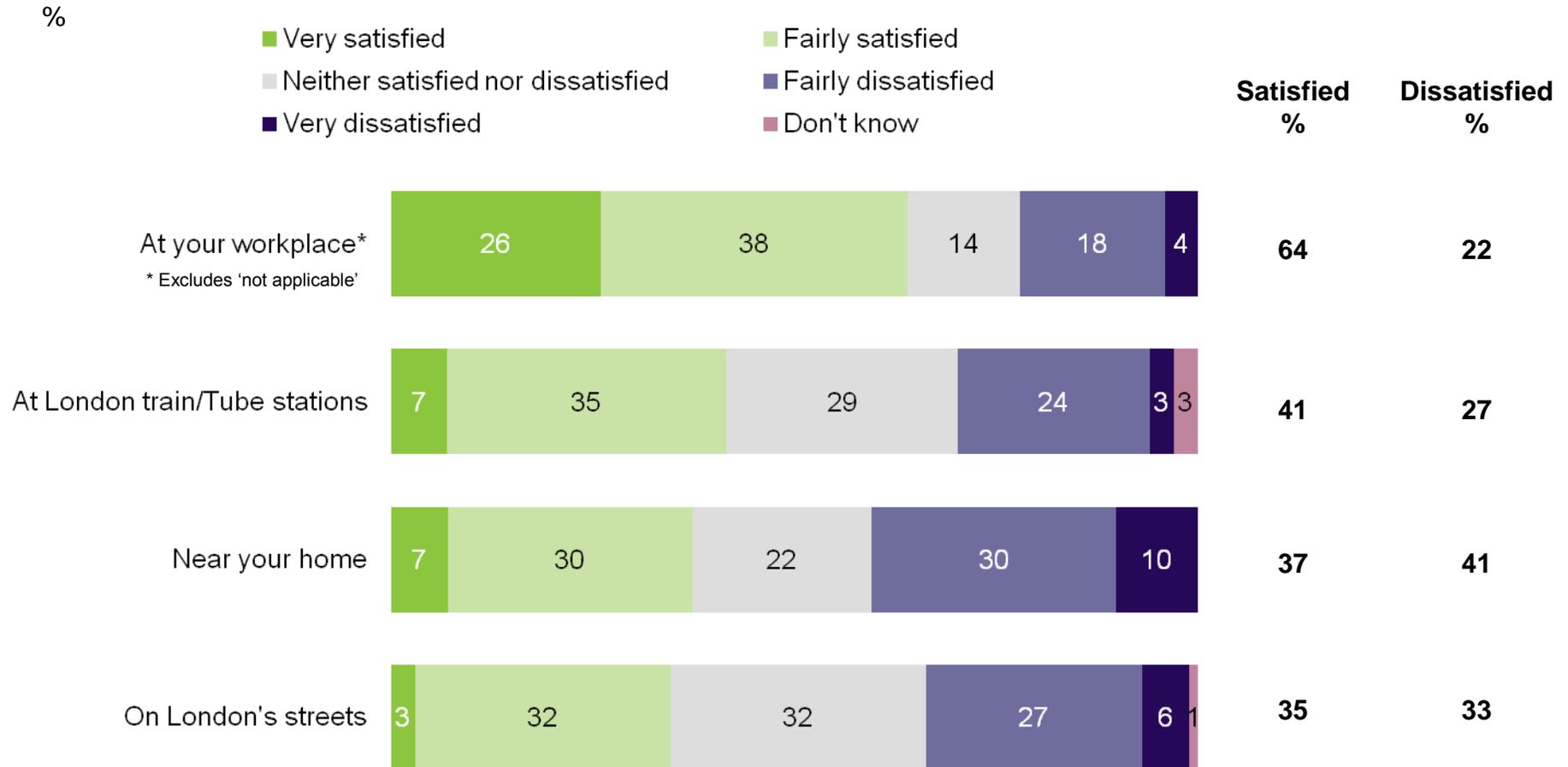
A2: How would you rate the following aspects of cycling in London?

Base: 2014: all cyclists (518) 2013: all cyclists (532)



Similarly, satisfaction with cycle parking facilities is highest at the work place, at 64%, but results are lower for parking elsewhere, such as on London's streets

Satisfaction with cycle parking facilities at different locations



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

Base: All cyclists (518)



Cyclists' satisfaction with parking facilities in London has remained largely unchanged compared with 2013

Satisfaction with cycle parking facilities at different locations (trend)

%

Availability of parking facilities...

	Satisfied		Dissatisfied	
	2014	2013	2014	2013
At your workplace* <small>*excludes not applicable</small>	64	65	22	21
On London's streets	41	39	27	31
Near your home	37	38	41	41
At train/Tube stations in London	35	40	33	27

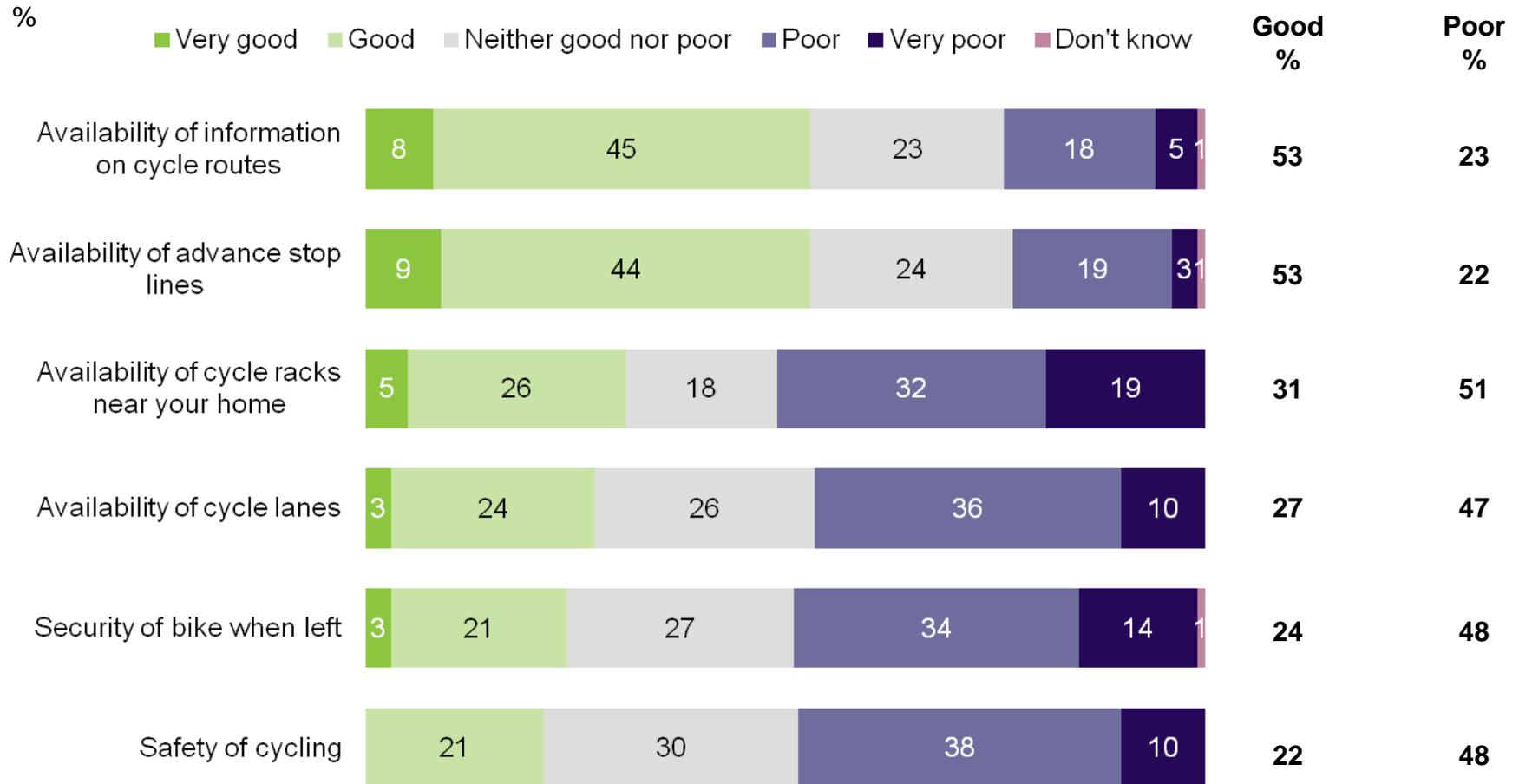
A3: How would you rate your level of satisfaction with the parking facilities for bicycles in London?

Base: 2014: all cyclists (518) 2013: all cyclists (532)



Over half of cyclists rate the availability of information on cycle routes and advance stop lines as good. Other areas are weaker – for example, availability of cycle lanes is only rated as good by a quarter

Ranking of potential deterrents



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

Base: All cyclists (518)



Ratings of the availability of cycle lanes have fallen this year; other measures have held steady

Ranking of potential deterrents (trend)

%

	Good		Poor	
	2014	2013	2014	2013
Availability of information on cycle routes	53	52	23	23
Availability of advance stop lines	53	n/a	22	n/a
Availability of cycle racks near your home	31	32	51	51
Availability of cycle lanes	27	34	47	48
Security of bike when it is left	24	26	48	48
Safety of cycling	22	26	48	49

 Significantly lower than 2013

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

Base: 2014: all cyclists (518) 2013: all cyclists (532)

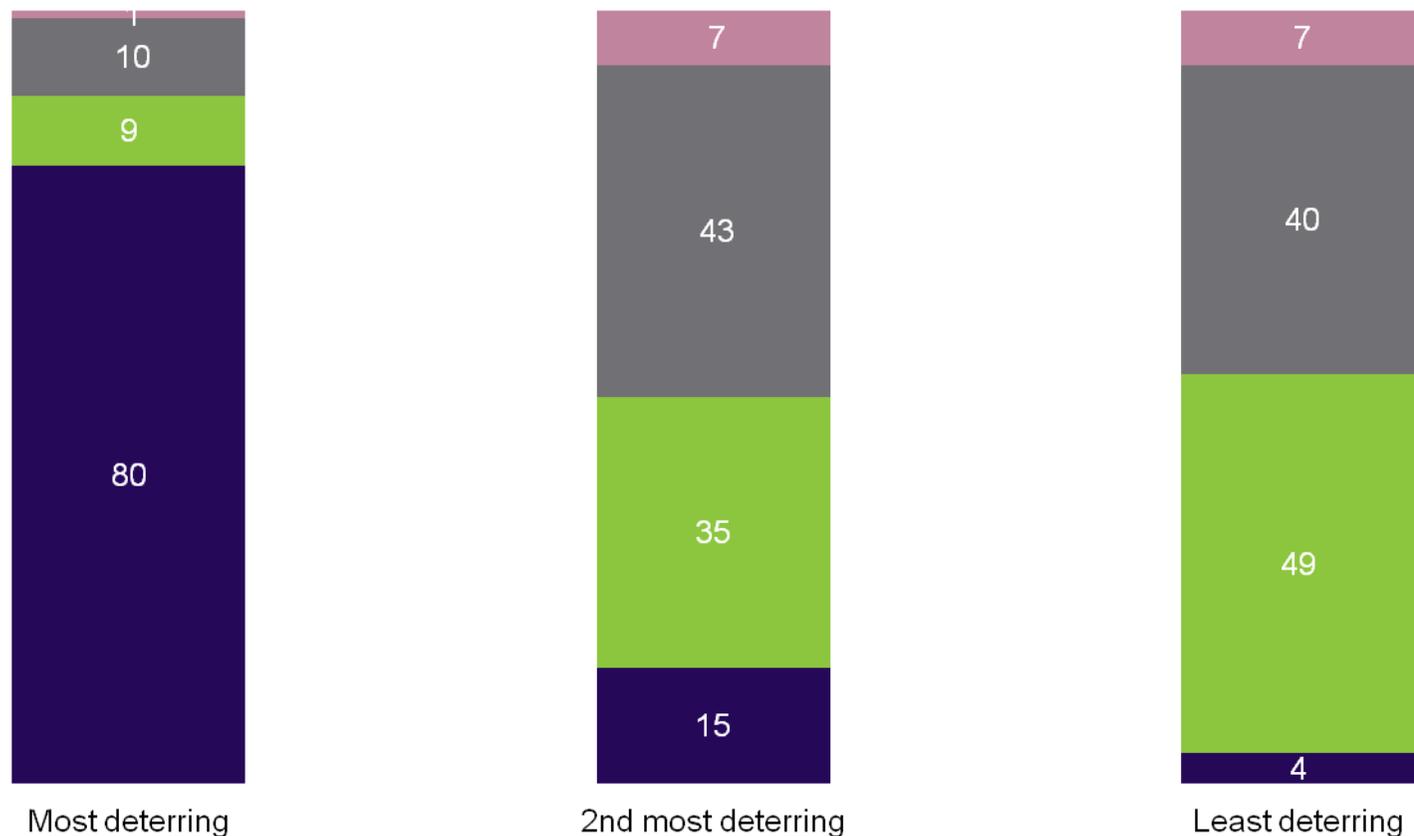


Safety concerns remain the key deterrent to cycling, far more so than concerns about lack of fitness or cycling ability

Ranking of key deterrents

%

■ Concern about my safety ■ Concern about my lack of fitness ■ Concern about my cycling ability ■ Don't know



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

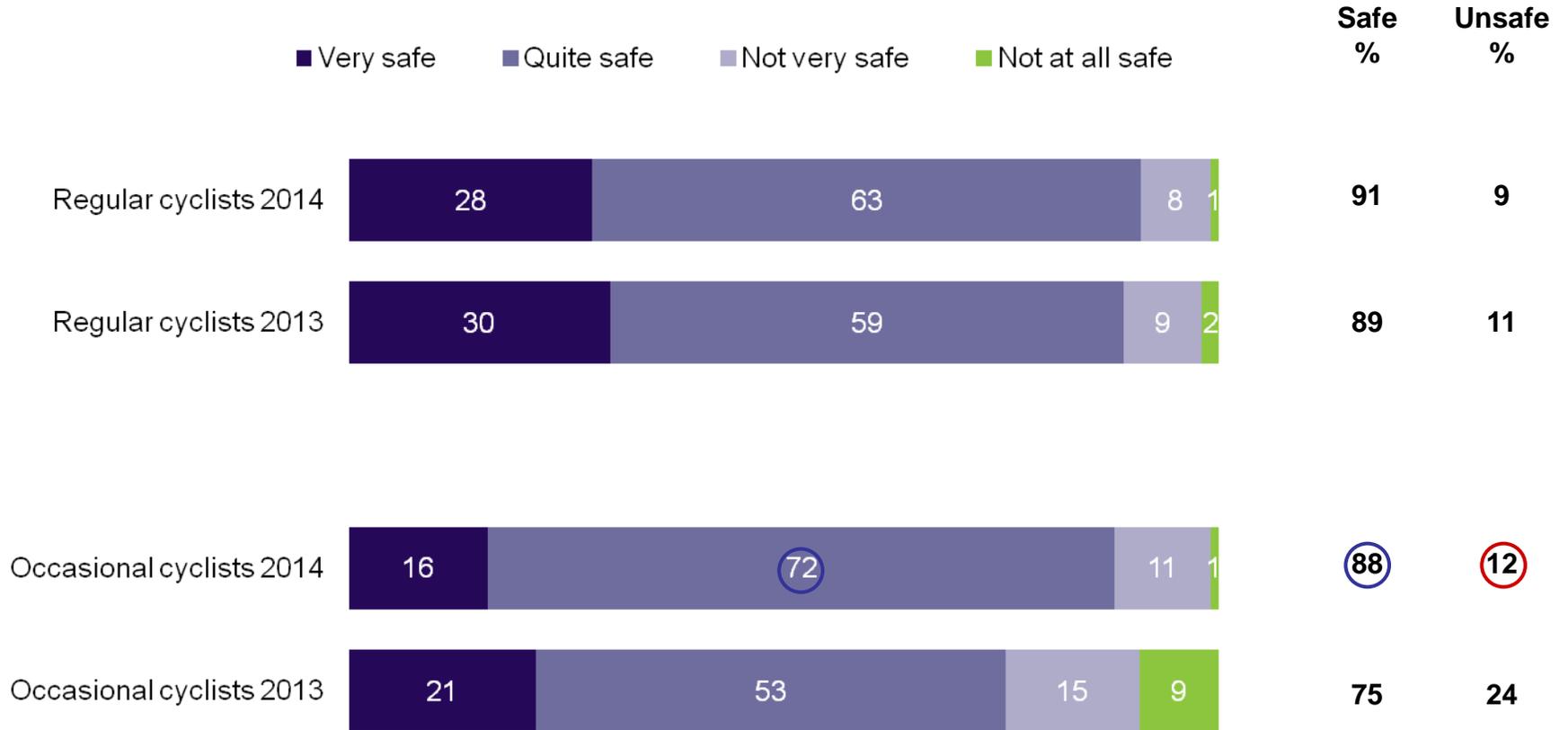
Base: Pre-contemplation, contemplation, preparation, and lapsed non-cyclists (912)



Occasional cyclists feel significantly safer cycling in traffic compared with last year

Feeling of safety cycling in traffic

%



○ Significantly lower than 2013 ○ Significantly higher than 2013

K6: Thinking about cycling in London, how safe on London's roads do you feel cycling in traffic?

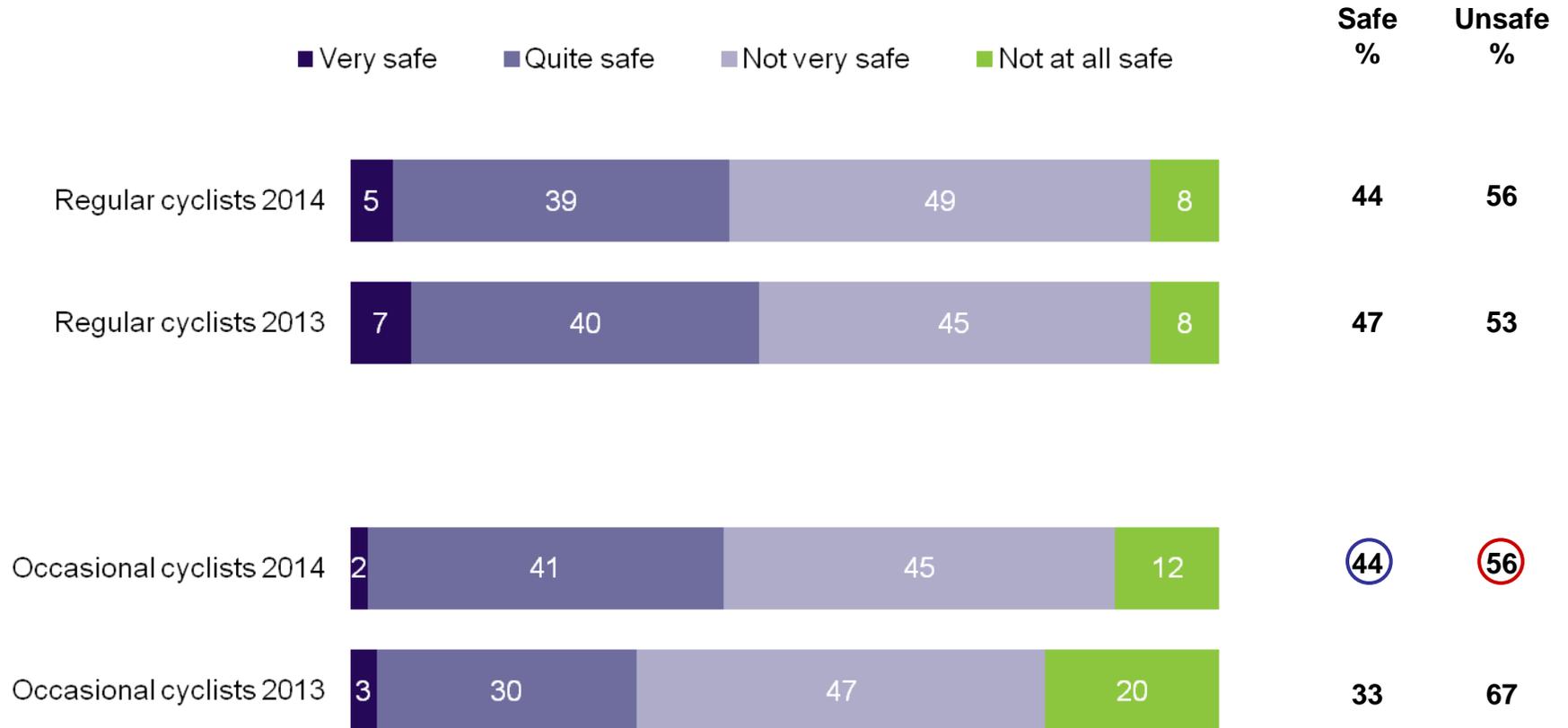
Base: Regular cyclists (2014: 392 2013: 329), occasional cyclists (2014: 126, 2013: 203)



Cycling on busy roads feels relatively less safe than cycling in traffic. Occasional cyclists' feeling of safety on busy roads has improved this year

Feeling of safety cycling on busy roads

%



○ Significantly lower than 2013 ○ Significantly higher than 2013

K7: In respect of the traffic you encounter on busy roads, would you say you feel?

Base: Regular cyclists (2014: 392, 2013: 329), occasional cyclists (2014: 126, 2013: 203)



Initiatives





Summary of initiatives

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
 - There have been recent extensions of the scheme to areas of East and South 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
 - Eight more routes are scheduled to 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 Prudential RideLondon (which is open to all)
 - The Tour de France, which has one stage in London, is also covered this year
- Cycle training, which is provided by London boroughs in conjunction with TfL
 - There are also other cycle training schemes (eg those organised through employers)
- Londoners' views and experiences on each of these are examined in turn



Barclays Cycle Hire





Barclays Cycle Hire

- Awareness of Barclays Cycle Hire has increased significantly since 2013 (83% compared to 77%)
 - Awareness among non-cyclists has also seen a significant increase (80% compared to 75%)
 - Awareness among cyclists is 92% and has remained consistent with last year

- The proportion of Londoners who have used Barclays Cycle Hire has also increased this year (13% compared to 10% in 2013)
 - Use has increased significantly among women and BAME Londoners

- Barclays Cycle Hire has had a positive impact on the frequency of cycling/intention to cycle among those currently using and those likely to use
 - 40% of current Barclays Cycle Hire users report that the scheme has increased the amount they cycle
 - Similarly 50% of intended users claim that the scheme is likely to increase the amount they intend to cycle

- However, the proportion of non-users who intend to use Barclays Cycle Hire in the future has decreased significantly this year (14% versus 26% in 2013), which could point to a slower rate of growth among Londoners in the year ahead

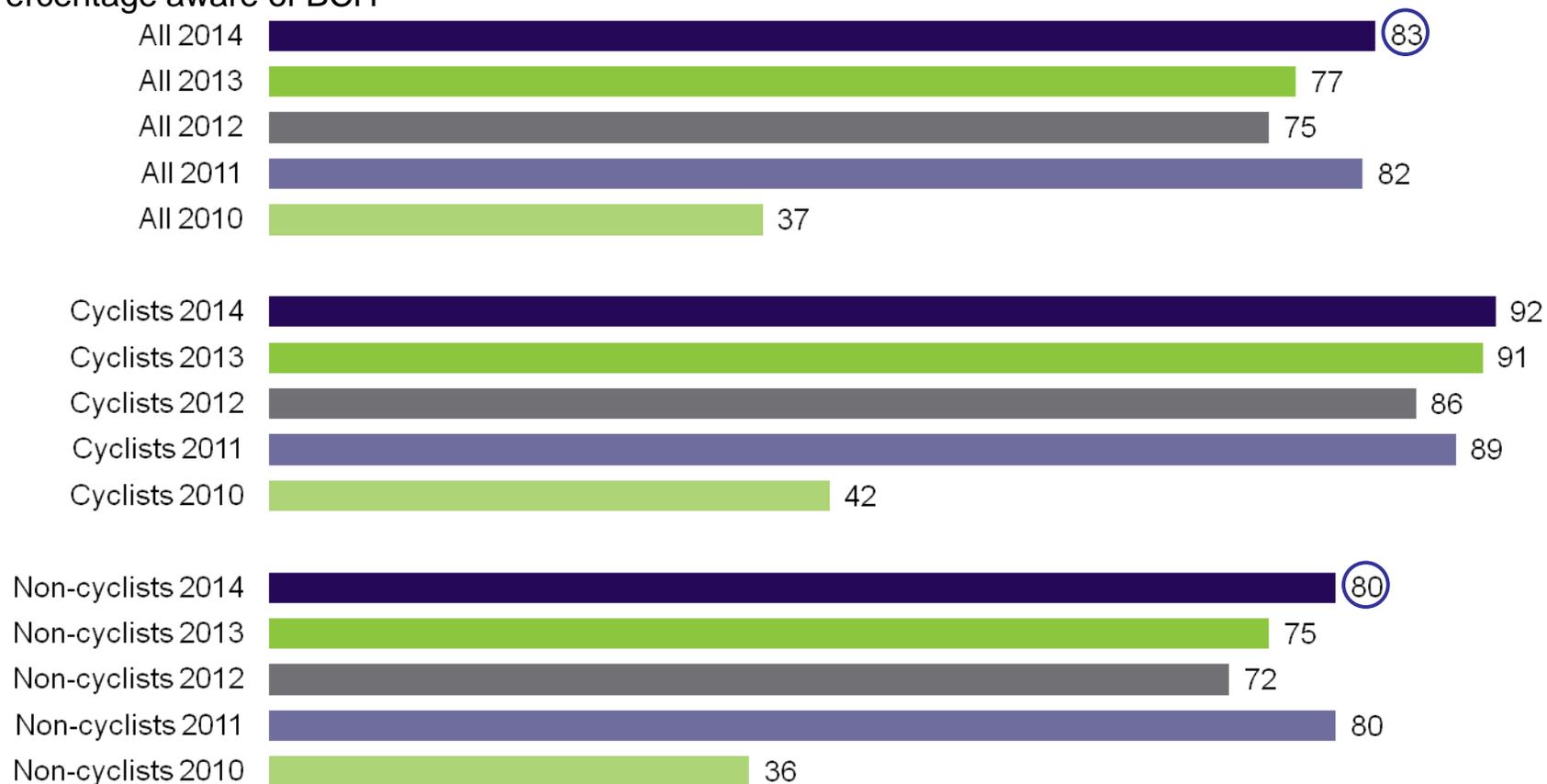


Over four fifths (83%) of Londoners are aware of BCH; more so for cyclists (92%) vs 80% for non cyclists, but this latter figure has risen markedly since 2013

Awareness of Barclays Cycle Hire

%

Percentage aware of BCH



 Significantly higher than 2013

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

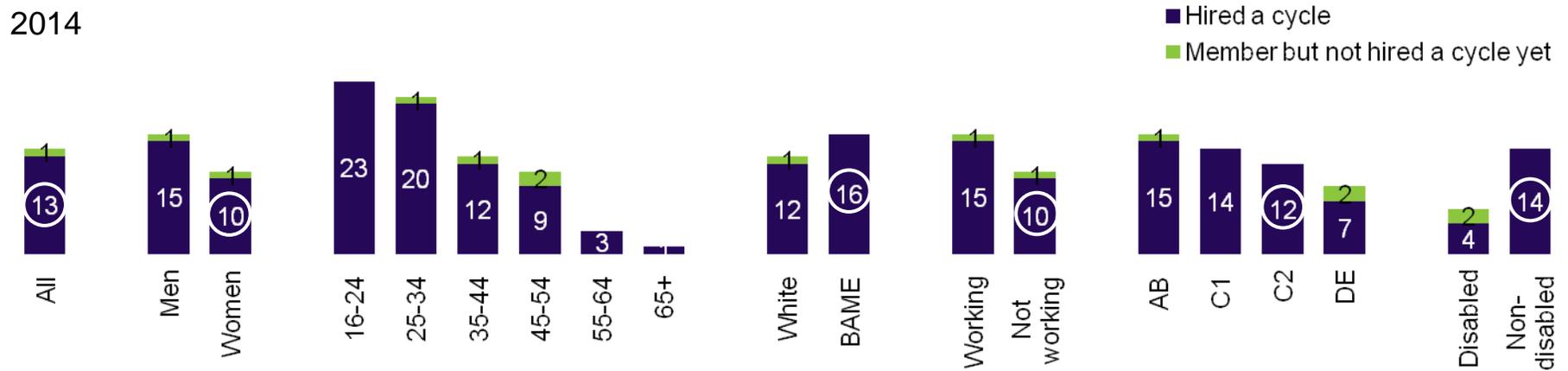
Base: All – 2014 (1,364), 2013 (1,373) 2012 (1,326); 2010-2011 (c.1,000); Cyclists – 2014 (518), 2013 (532) 2012 (505) 2010-2011 (c.170); Non-cyclists – 2014 (846), (2013 (841); 2012 (821) 2010-2011 (c.870)



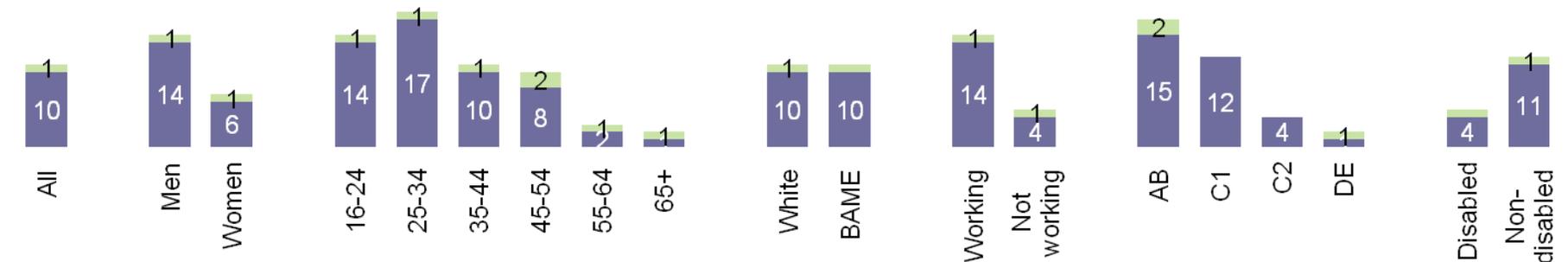
1 in 8 Londoners have used a BCH bicycle, a significant rise, with growth among women and BAME Londoners

Use of Barclays Cycle Hire

%
2014



2013



Significantly higher than 2013

N2: Have you used Barclays Cycle Hire?

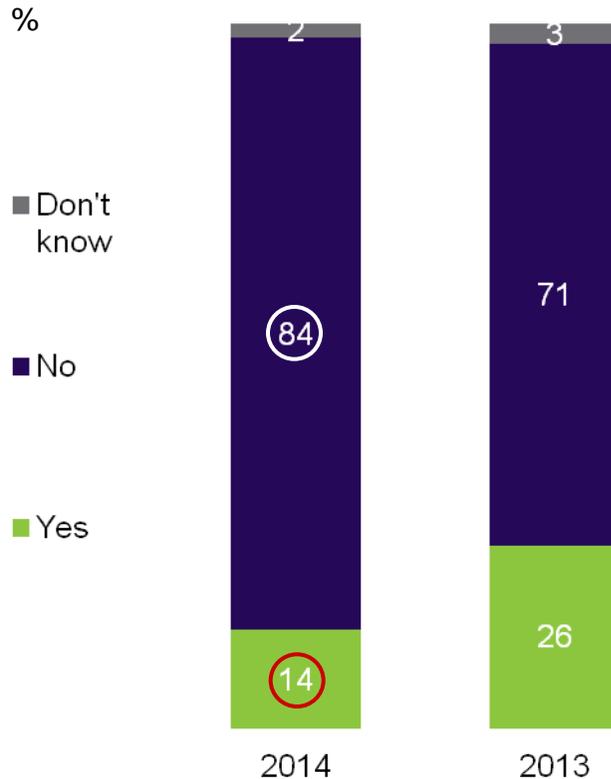
Base: all 2014 (1,364), 2013 (1,373)



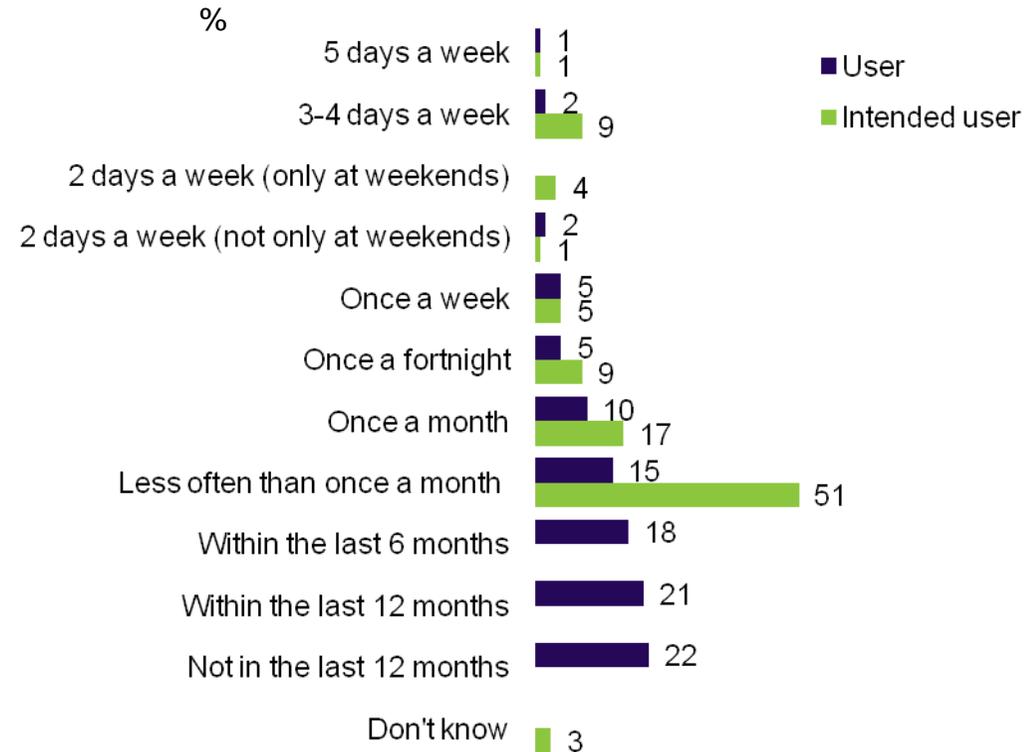
Non-users' intention to hire a BCH bicycle in the future has decreased this year, from 26% to 14%

(Intended) frequency of use

Whether intended to use Barclays Cycle Hire in the future



Frequency of using Barclays Cycle Hire



○ Significantly lower than 2013 ○ Significantly higher than 2013

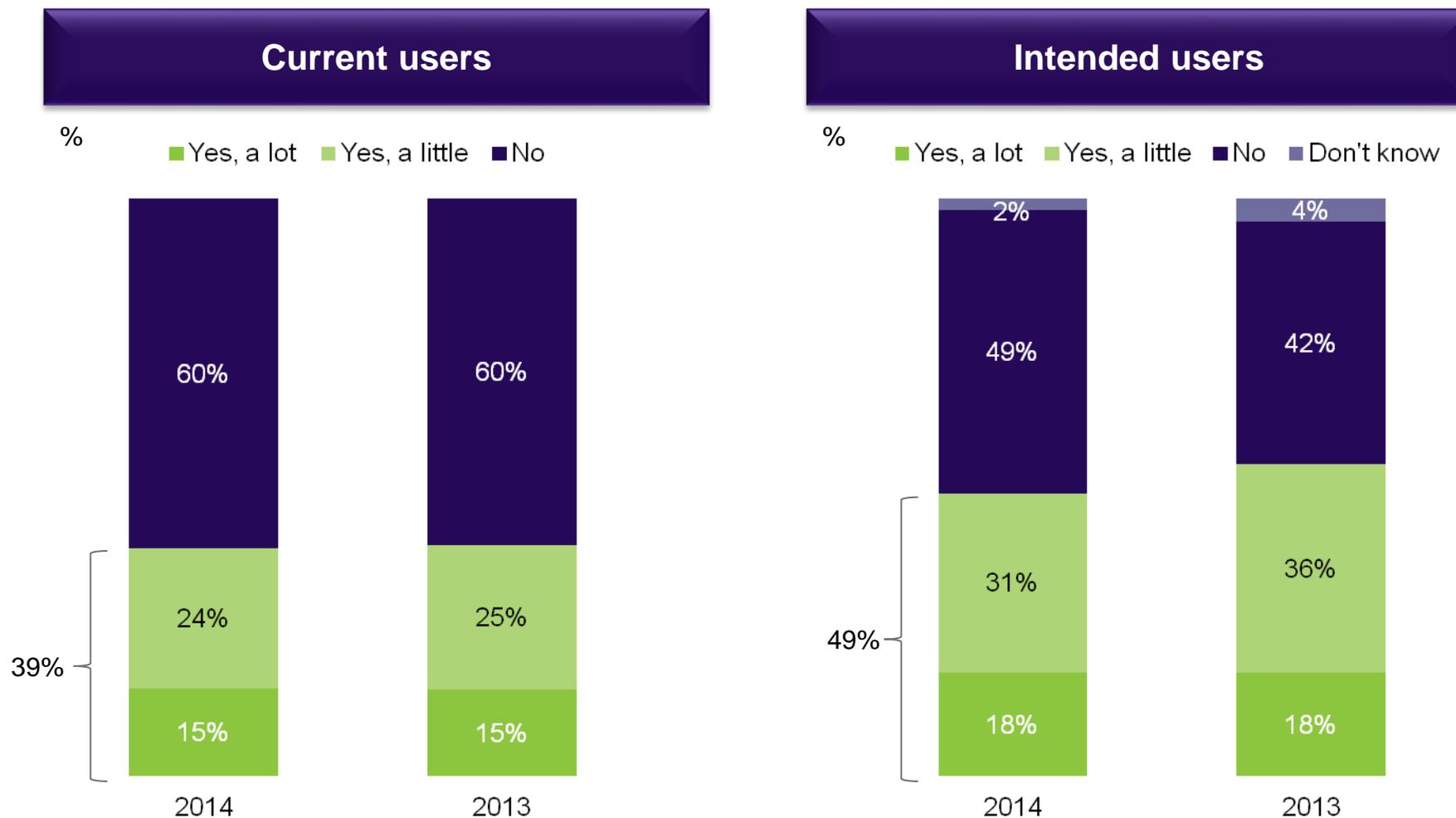
N3: Do you intend to use Barclays Cycle Hire in the future? Base: all Barclays Cycle Hire Non-Users – 2014 (1,207), 2013 (1,235)

N4: How often do you (intend to) use Barclays Cycle Hire? Base: Those who used or intend to use Barclays Cycle Hire – 2014 (157/141), 2013 (138/294)



39% of users report cycling more as a result of BCH, while 49% of intended users believe it will increase their level of cycling

Impact of BCH on (intended) cycling



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

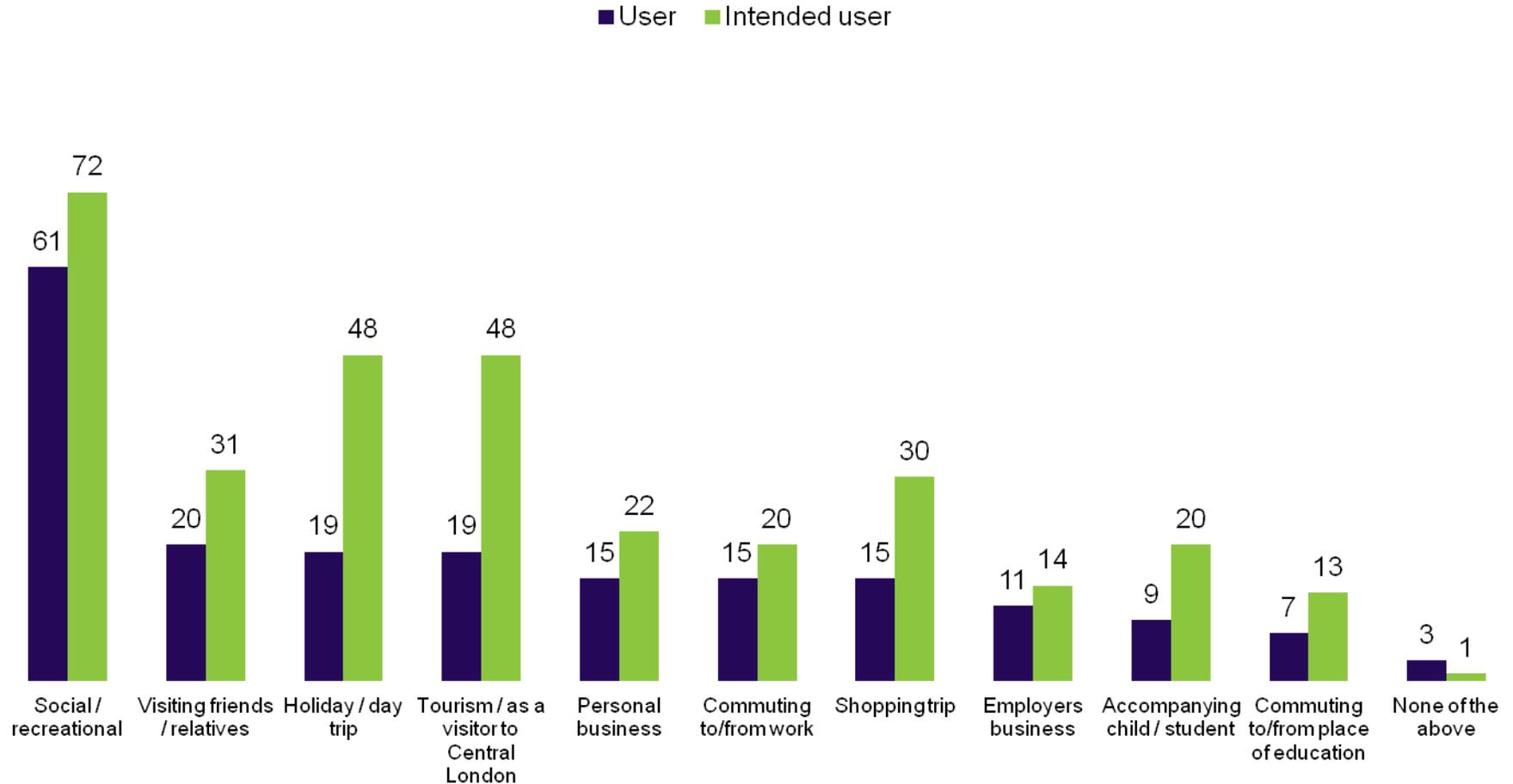
Base: all current users – 2014 (157), 2013 (138); all intended users – 2014 (141), 2013 (294)



The most common actual or intended use of BCH is for social/recreational purposes. Intended users claim they will use BCH for a wider range of journey purposes than current users report, including holidays, day trips and tourism

(Intended) trip use for Barclays Cycle Hire

%



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

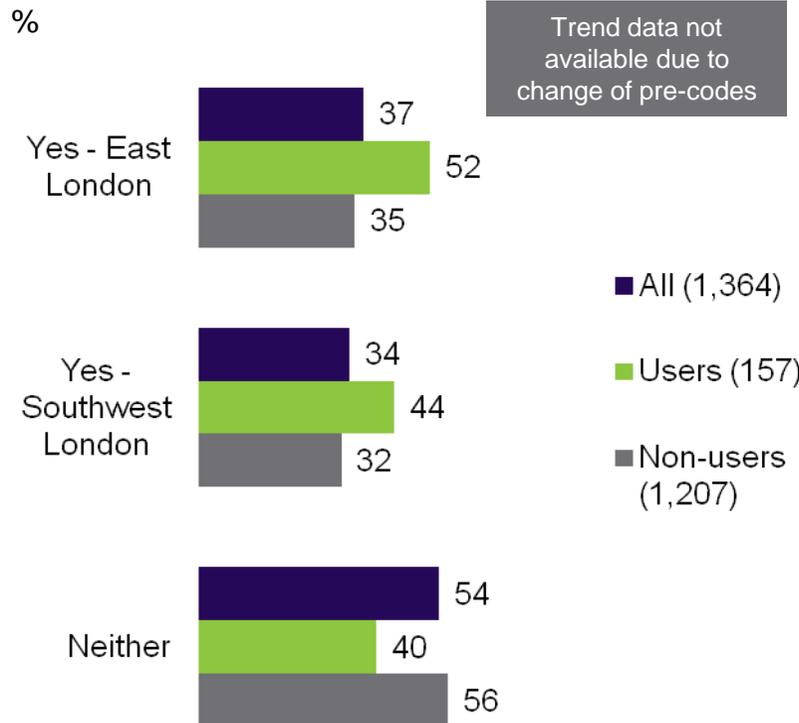
Base: all users (user: 157; intended user: 141)



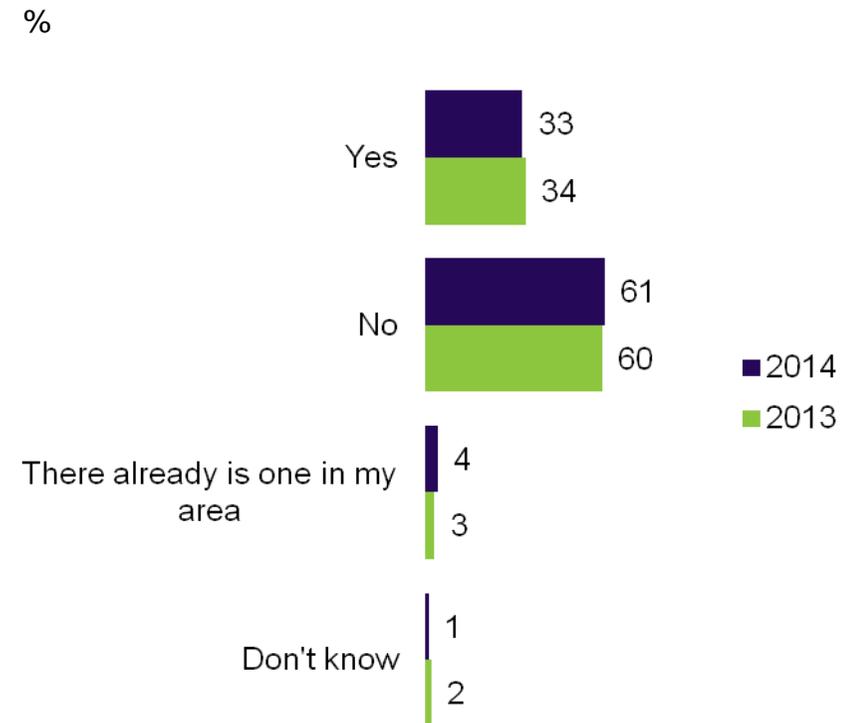
Around a third of Londoners are aware of BCH expansion zones in either the East or South. A third of non-users claim they would use the scheme if it was in their area, consistent with 2013

Eastern and Southern expansion area and potential use

Awareness of Eastern and Southern expansion areas



Whether would use Barclays Cycle Hire if in your area



N7: Were you aware that the area covered by Barclays Cycle Hire is expanding from Central London to include more of East London and South London? Base: All (1,364)

N8: If there were a Barclays Cycle Hire in your area, would you use it? Base: all Barclays Cycle Hire Non-Users – 2014 (1,207), 2013 (1,235)



Barclays Cycle Superhighways





Barclays Cycle Superhighways

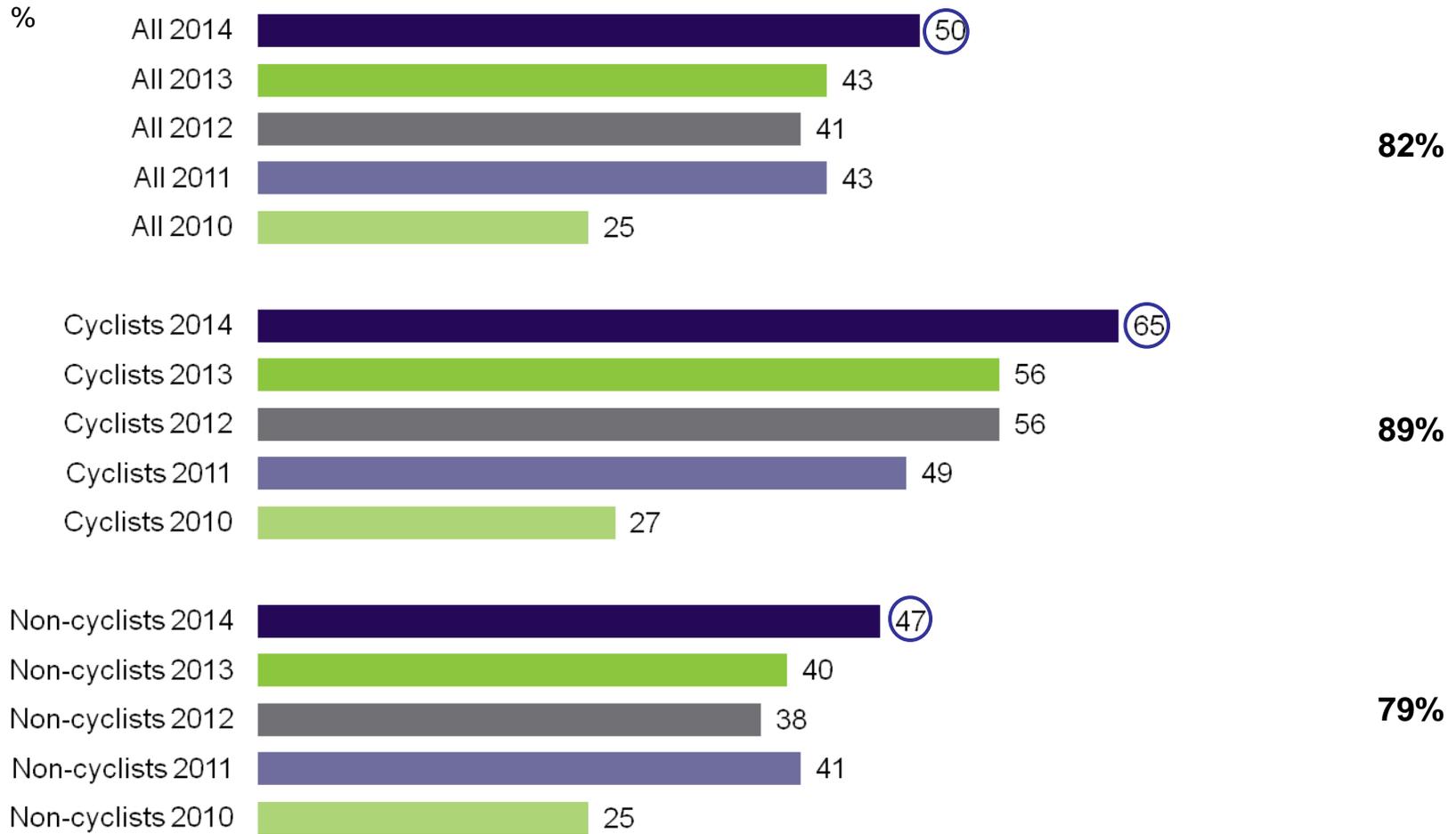
- 50% of Londoners say they are aware of Barclays Cycle Superhighways (BCSH), a significant increase compared to findings from 2013 (43%)
 - There remains some confusion between Barclays Cycle Superhighways and Barclays Cycle Hire. Once BCSHs are described, 18% who originally reported being aware of BCSH say they were thinking of something else
- Among those who are aware of Barclays Cycle Superhighway 22% report having used them (compared to 15% in 2013)
- A small proportion (15%) of those who are aware but have not used BCSH intend to use them in future, with limited frequency (once a month or less often)
- Nearly a fifth of BCSH users (19%) say they have increased their cycling as a result of BCSH lanes. This is significantly higher than reported in 2013 (10%)
- Despite improving results for awareness and usage of BCSH, only one third of those aware of BCSH are satisfied with the availability across London. Satisfaction among those users has declined significantly (49% compared with 64% in 2013)



Half of Londoners say they are aware of Barclays Cycle Superhighways. Some false recall, particularly among non-cyclists

Awareness of Barclays Cycle Superhighways

Once described – is that what you meant?



Significantly higher than 2013

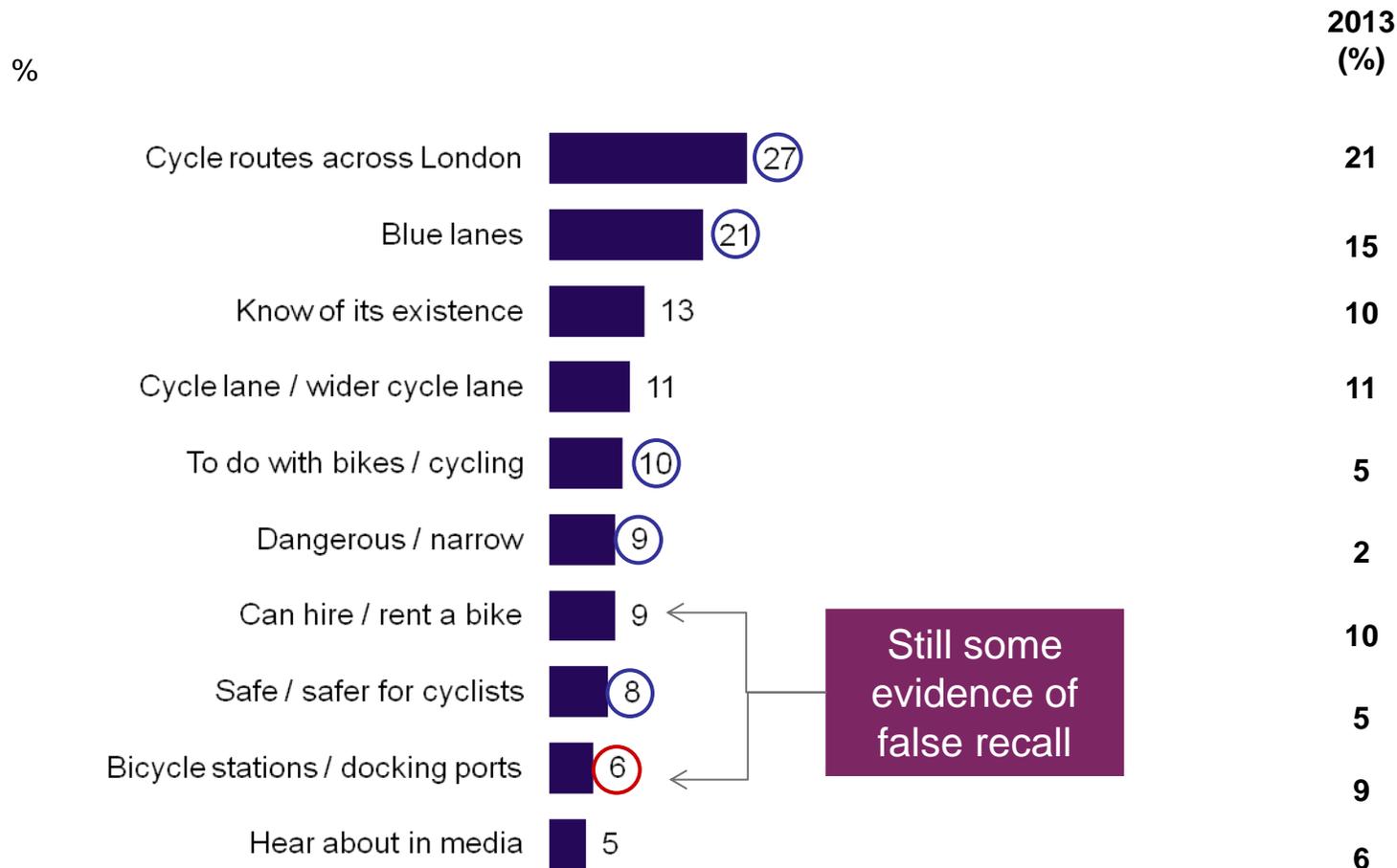
M1: Are you aware of Barclays Cycle Superhighways?

Base: All – 2014 (1,364), 2013 (1,373) 2012 (1,326); 2010-2011 (c.1,000); Cyclists – 2014 (518), 2013 (532) 2012 (505) 2010-2011 (c170); Non-cyclists – 2014 (846), 2013 (841); 2012 (821) 2010-2011 (c.870)



An increasing proportion of Londoners correctly mention blue lanes and cycle routes this year. However, there is still some confusion with BCH

Understanding of Barclays Cycle Superhighways



Mentioned over 4% shown

○ Significantly lower than 2013

○ Significantly higher than 2013

M2: What do you know about the Barclays Cycle Superhighways?
 Base: those aware of Barclays Cycle Superhighways – 2014 (739), 2013 (590)

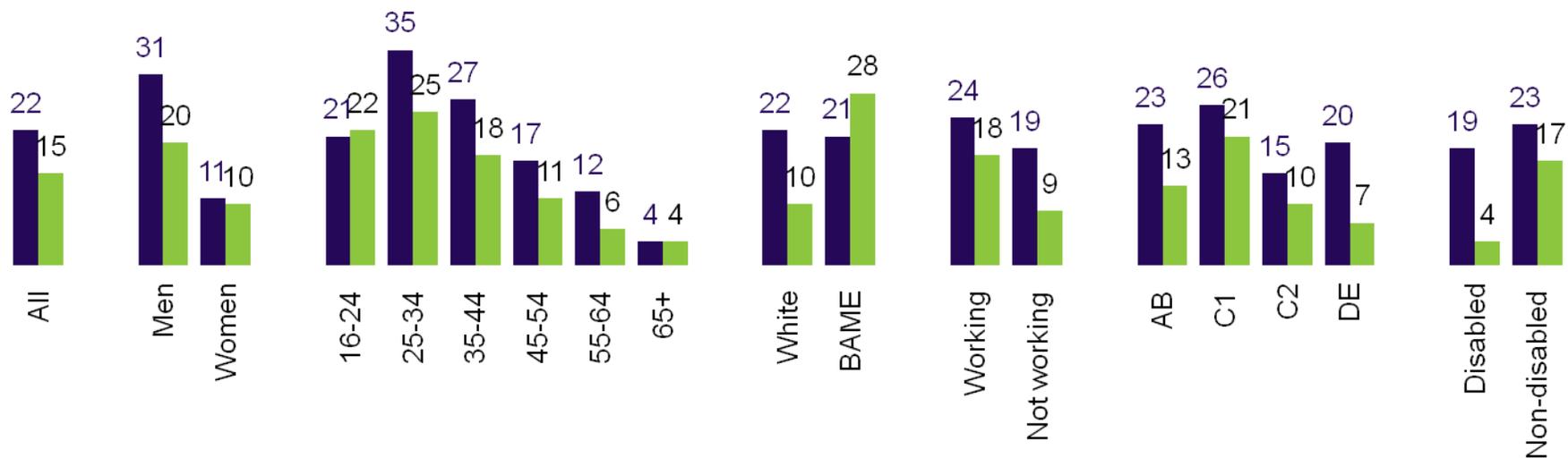


Of those aware of BCSH, 22% have used them (vs 15% in 2013) and 15% of non-users intend to - especially men, younger Londoners and BAME Londoners

Use of Barclays Cycle Superhighways

%

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



M3: Do you intend to use the Barclays Cycle Superhighways? Base: all aware but not used (436)

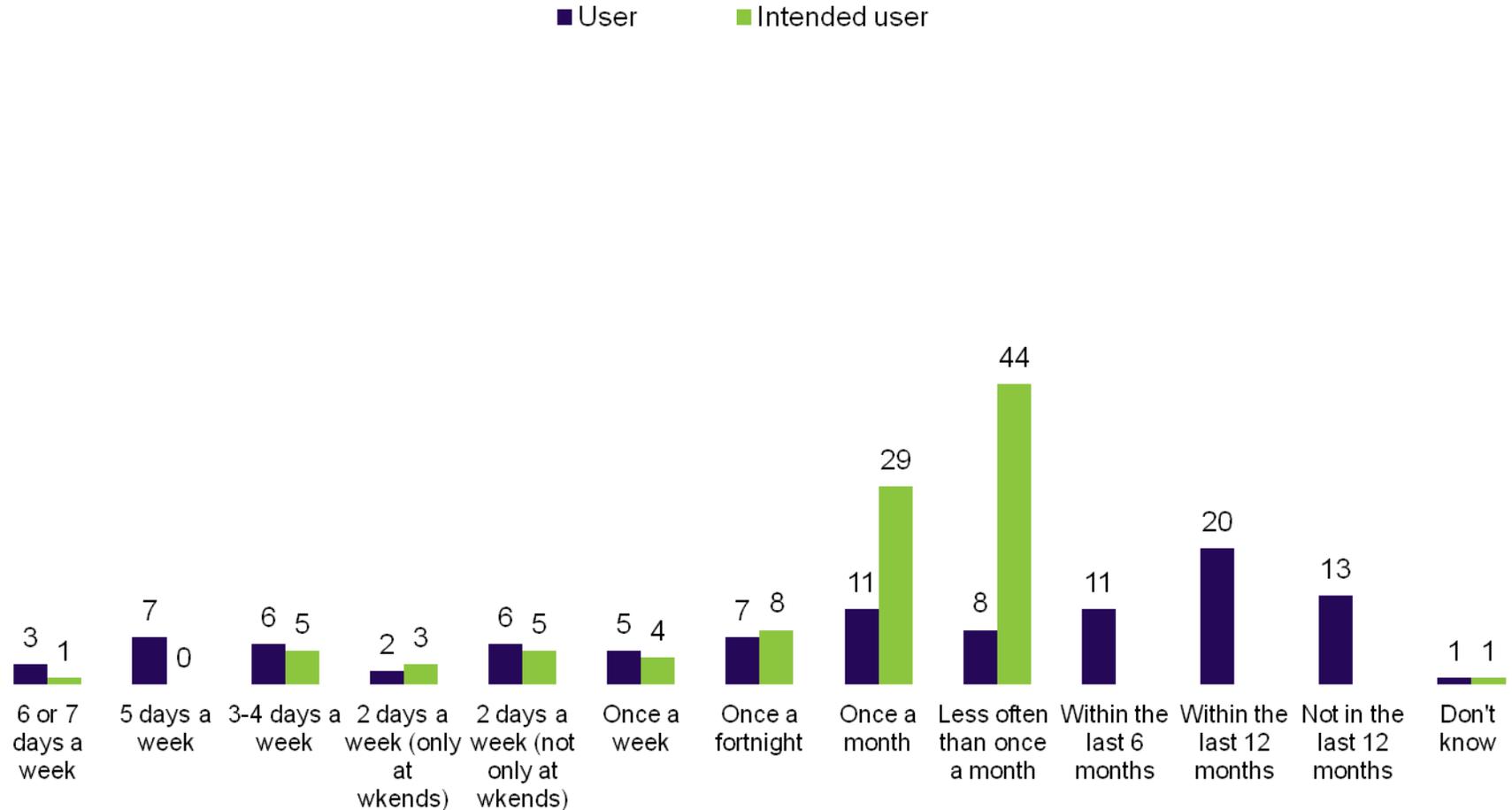
M4: Have you used the Barclays Cycle Superhighways? Base: all aware (615)



Most use (or say they intend to use) BCSH lanes once a month or less

(Intended) frequency of use for Barclays Cycle Superhighways

%



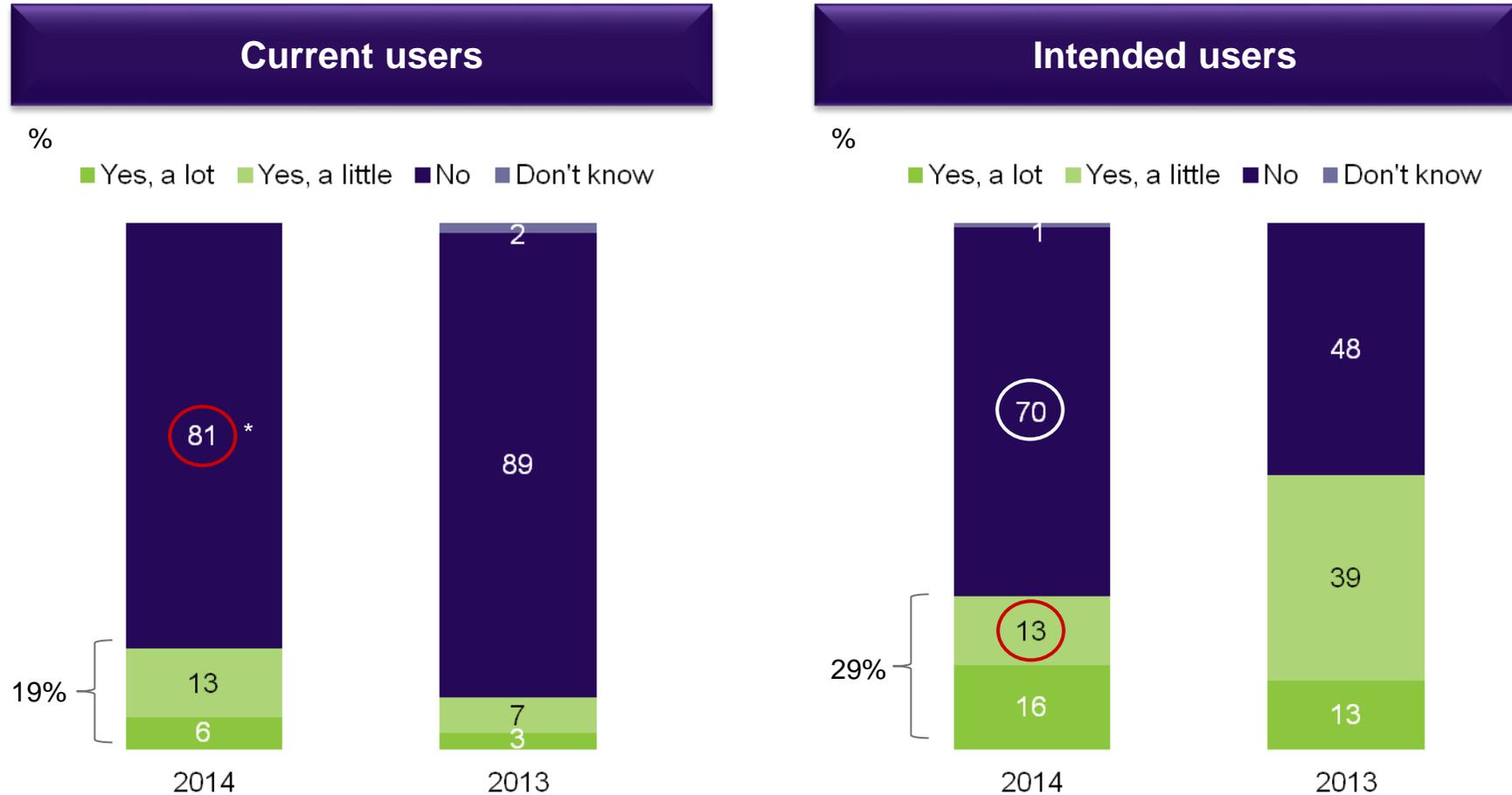
M5: How often do you (intend to) use Barclays Cycle Superhighways?

Base: all users (user: 179); intended user: 56)



A fifth (19%) of BCSH users say that they have increased their cycling as a result of the BCSH lanes, significantly more than in 2013 (10%). Compared with last year, fewer intended users think the lanes would increase their level of cycling (29%, down from 52%)

Impact of BCSH on (intended) cycling



*Difference not significant if 2001 Census weighting applied

○ Significantly lower than 2013

○ Significantly higher than 2013

M6: Have the Barclays Cycle Superhighways caused you to increase the amount that you (intend to) cycle?

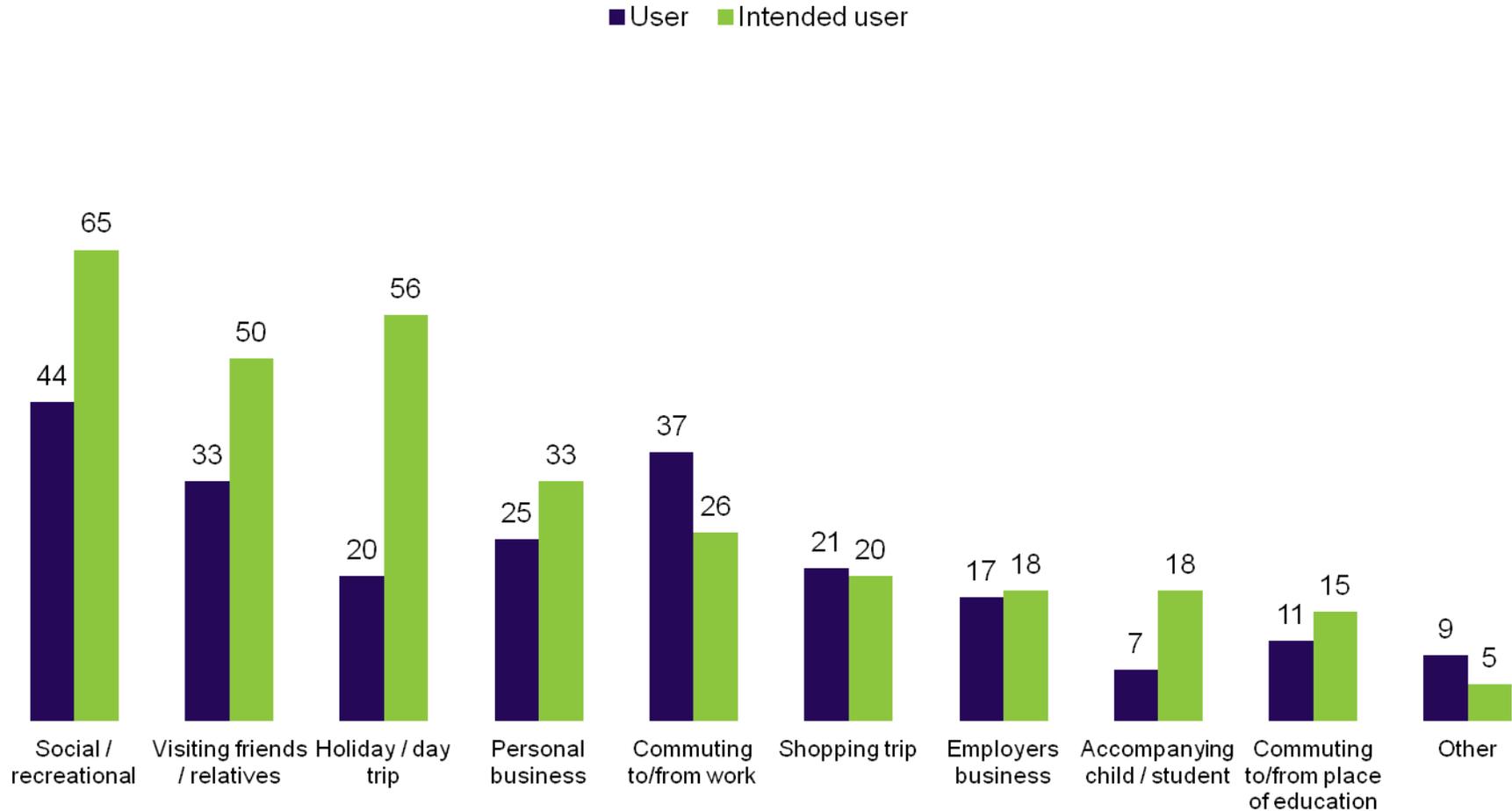
Base: all users – 2014 (179 current, 56 intended), 2013 (129 current, 120 intended)



Social and recreational journeys are the most popular trips (and intended trips), followed by commuting (users) and holidays/day trips (intended users)

(Intended) trip use for Barclays Cycle Superhighways

%



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

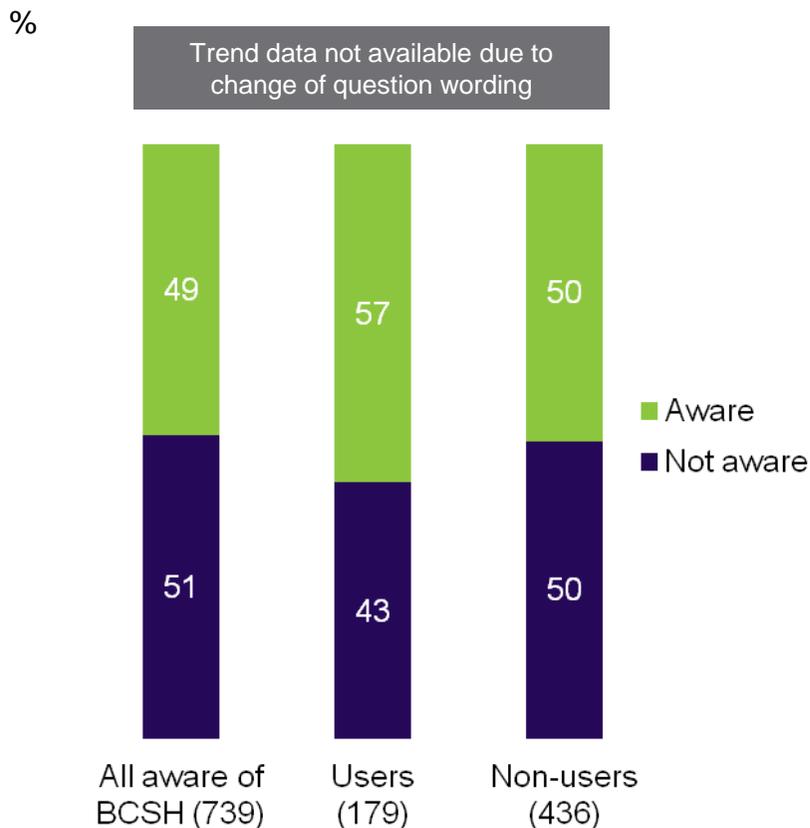
Base: all users and intended users (179 current users, 56 intended users)



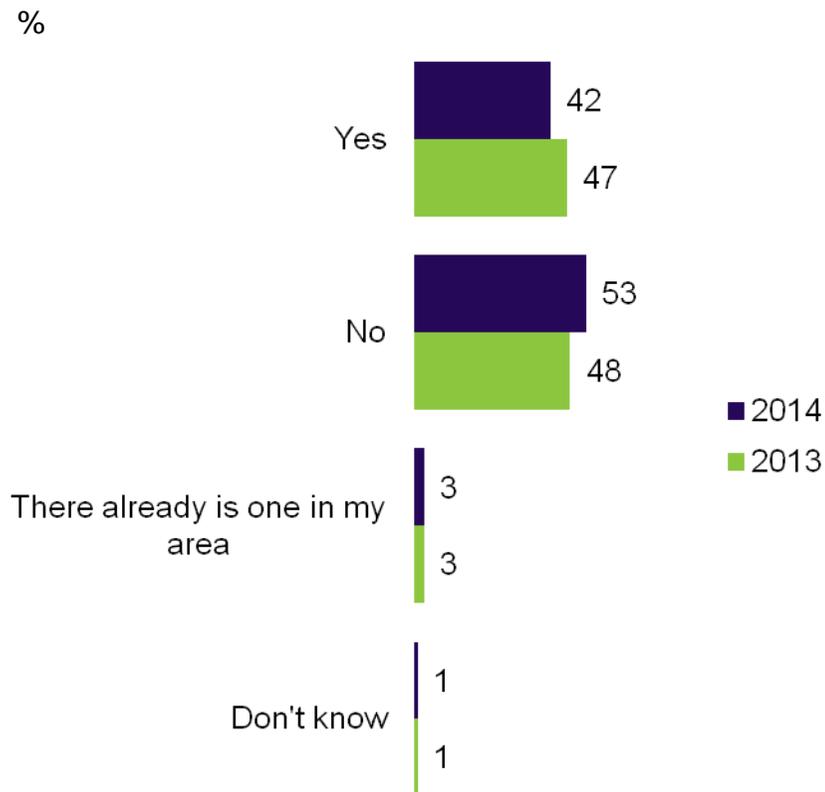
Half of those aware of BCSH know that a London-wide network of cycle routes is being built. Two fifths of those who have not used a BCSH say they would do so if there was one in their area

Awareness of London-wide cycle route network

Awareness that London-wide network of cycle routes will be built



Whether would use BCSH if installed in your local area



M8. Were you aware that a London-wide network of cycle routes will be built over the coming years? Base: Those aware of Barclays Cycle Superhighways (739)

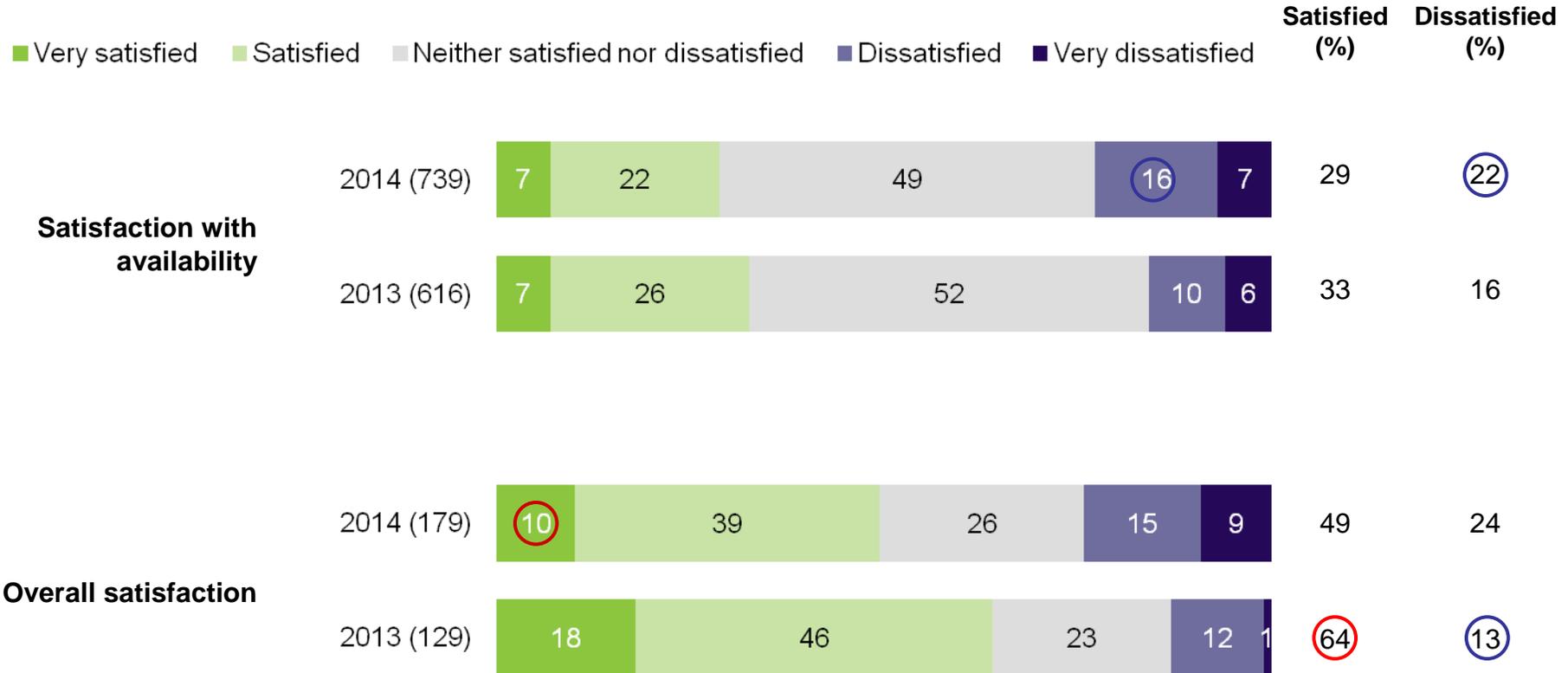
M9: If the Barclays Cycle Superhighways are installed near to where you live, would that encourage you to use them? Base: all non-users who do not intend to use BCSH – 2014 (436), 2013 (487)



Users' satisfaction with Barclays Cycle Superhighways has decreased this year, while dissatisfaction with the availability of BCSH (among those aware of them) has risen to just over a fifth

Satisfaction with Barclays Cycle Superhighways

%



M3a: How satisfied or dissatisfied are you with the availability of Barclays Cycle Superhighways across London? Base: all aware (base sizes in brackets above)

M4a: How would you rate your level of satisfaction overall with the Barclays Cycle Superhighways? Base: All users (base sizes in brackets above)

○ Significantly lower than 2013 ○ Significantly higher than 2013



Cycling events





Cycling events

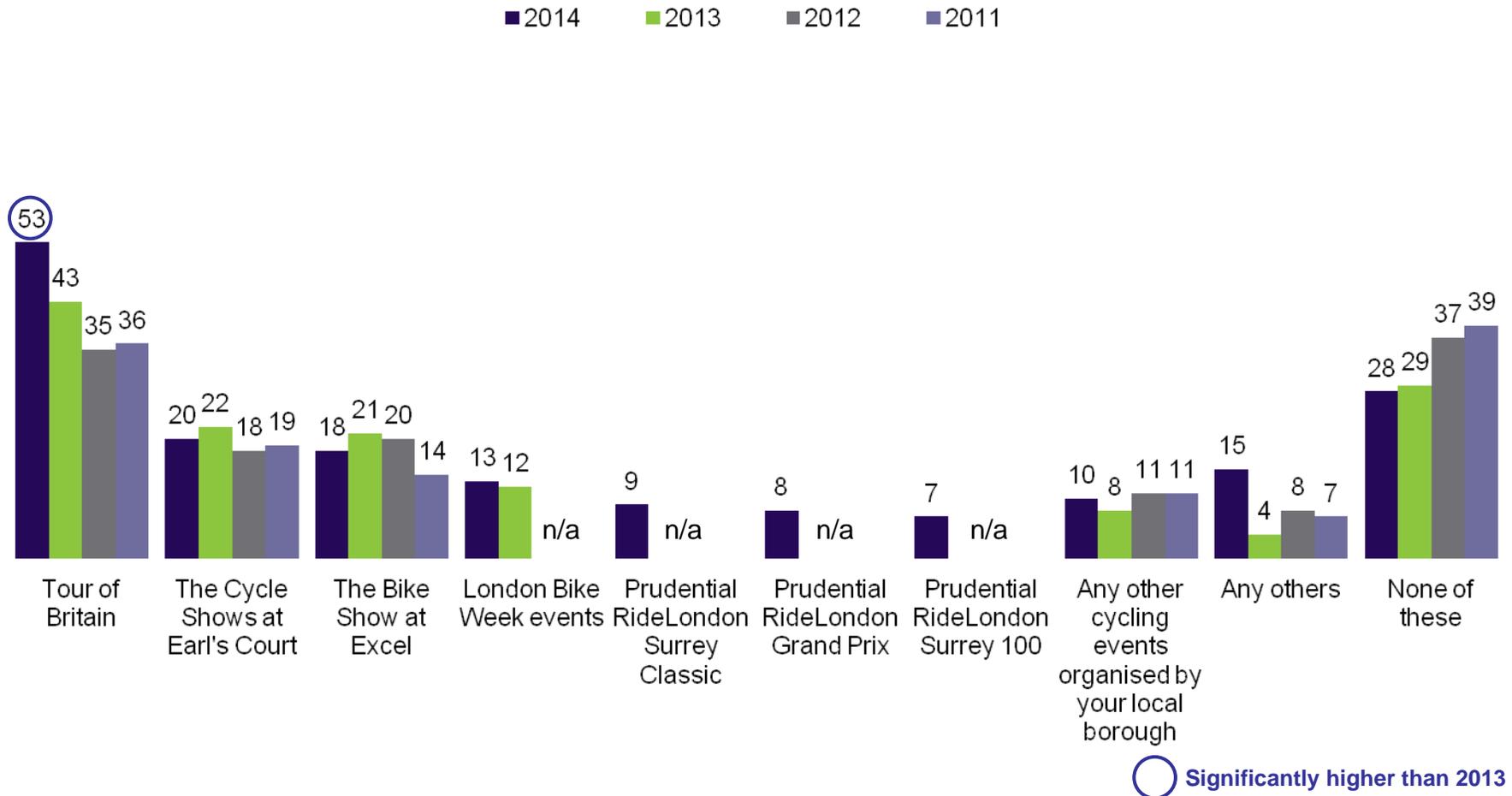
- Nearly three quarters are aware of at least one show or event related to cycling, a similar proportion to last year, while 13% have attended a cycling event in London in the last 12 months
- Four in five Londoners are aware of the Tour de France and of those, 61% are aware that parts of the race will be held in England in 2014
 - The Cambridge to London sector has the highest level of awareness (55%)
 - 12% of all Londoners say they are likely to attend the Cambridge to London stage of the Tour de France
- Tour of Britain remains the most recognised British cycling event, with awareness increasing to 53% this year (vs 43% in 2013)
- As in previous waves, the incidence of Londoners claiming they will attend various cycling events in the future is somewhat inflated compared to actual past participation.
 - 30% claim they are likely to attend an event in the next year though only 13% attended this year
- For one in five Londoners claim that celebrity cyclists motivate them to cycle more often



There is a significant increase in awareness of the Tour of Britain event, while other shows and events achieve lower recognition

Awareness of cycling events

%



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

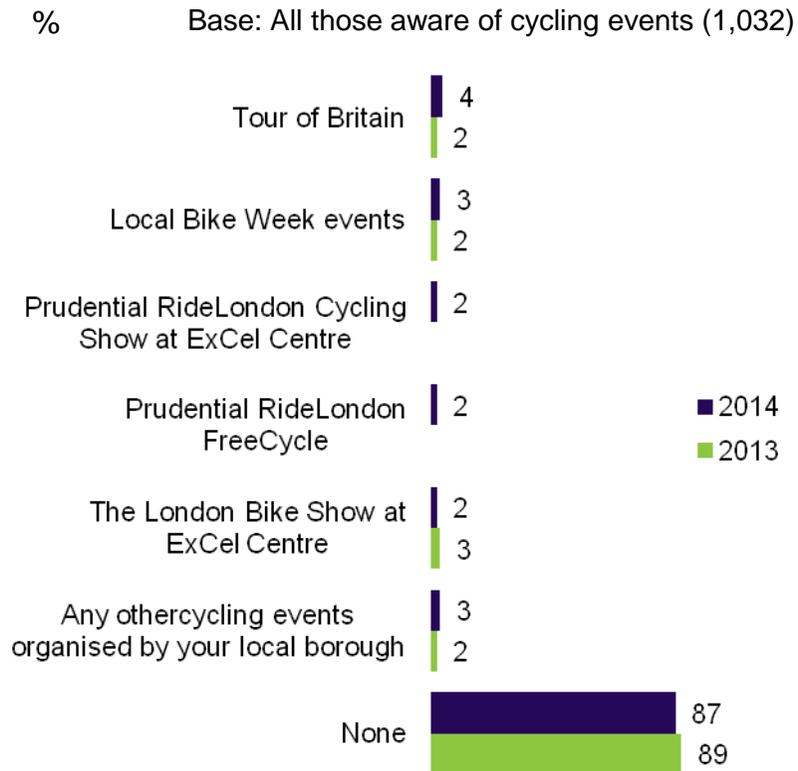
Base: All 2014 (1,364), 2013 (1,373), 2012 (1,326), 2011 (1,066)



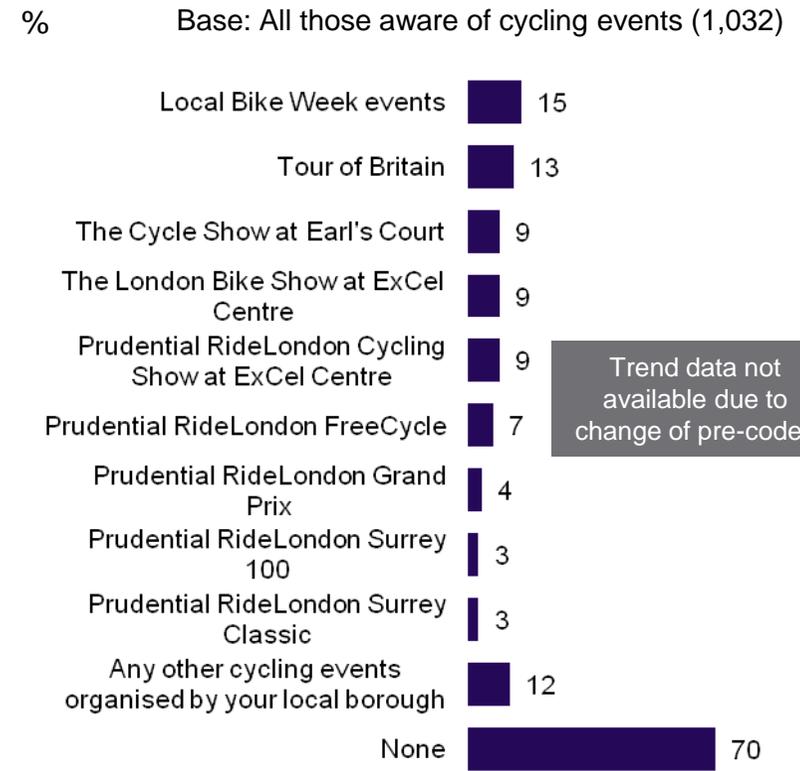
As seen in previous waves, reported future attendance is higher than actual past attendance. Tour of Britain and local Bike Week events attract the highest interest

Reported attendance of cycling events

Events attended in last 12 months



Events likely to attend in next 12 months



No significant differences compared with 2013

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 – 2014 (1,037), 2013 (1,032)

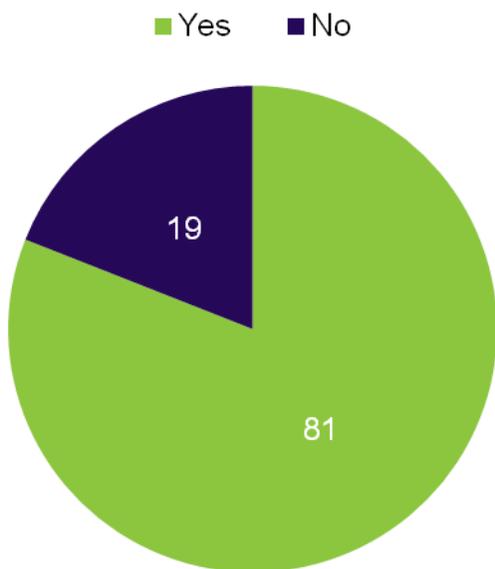


Most Londoners (81%) are aware of the Tour de France and among those aware, three fifths know that parts of the race will take place in this year

Awareness of Tour de France

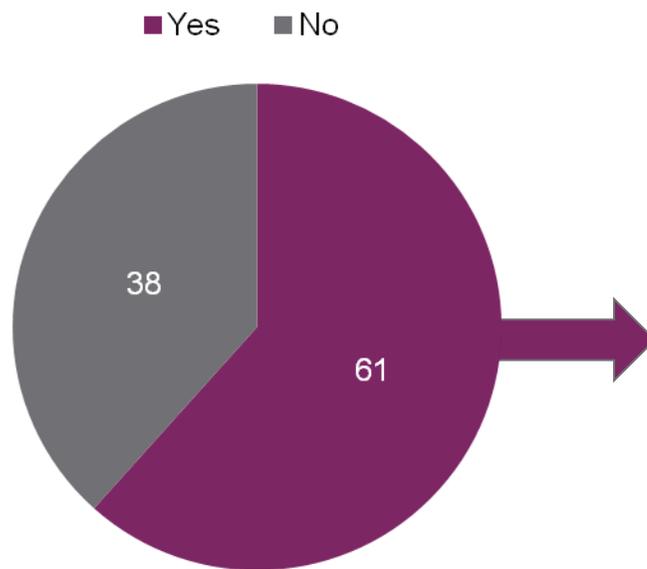
Aware of Tour de France

%



Aware that parts of Tour de France will take place in England this year

%



Stages	Awareness
Cambridge - London	55%
Leeds - Harrogate	33%
York - Sheffield	33%
None of these	31%

TDF1: Have you heard of the Tour de France professional cycle race? Base: all (1,364)

TDF2: Are you aware that parts of the Tour de France cycle race will take place in England this year? Base: All respondents aware of the Tour de France (1,258)

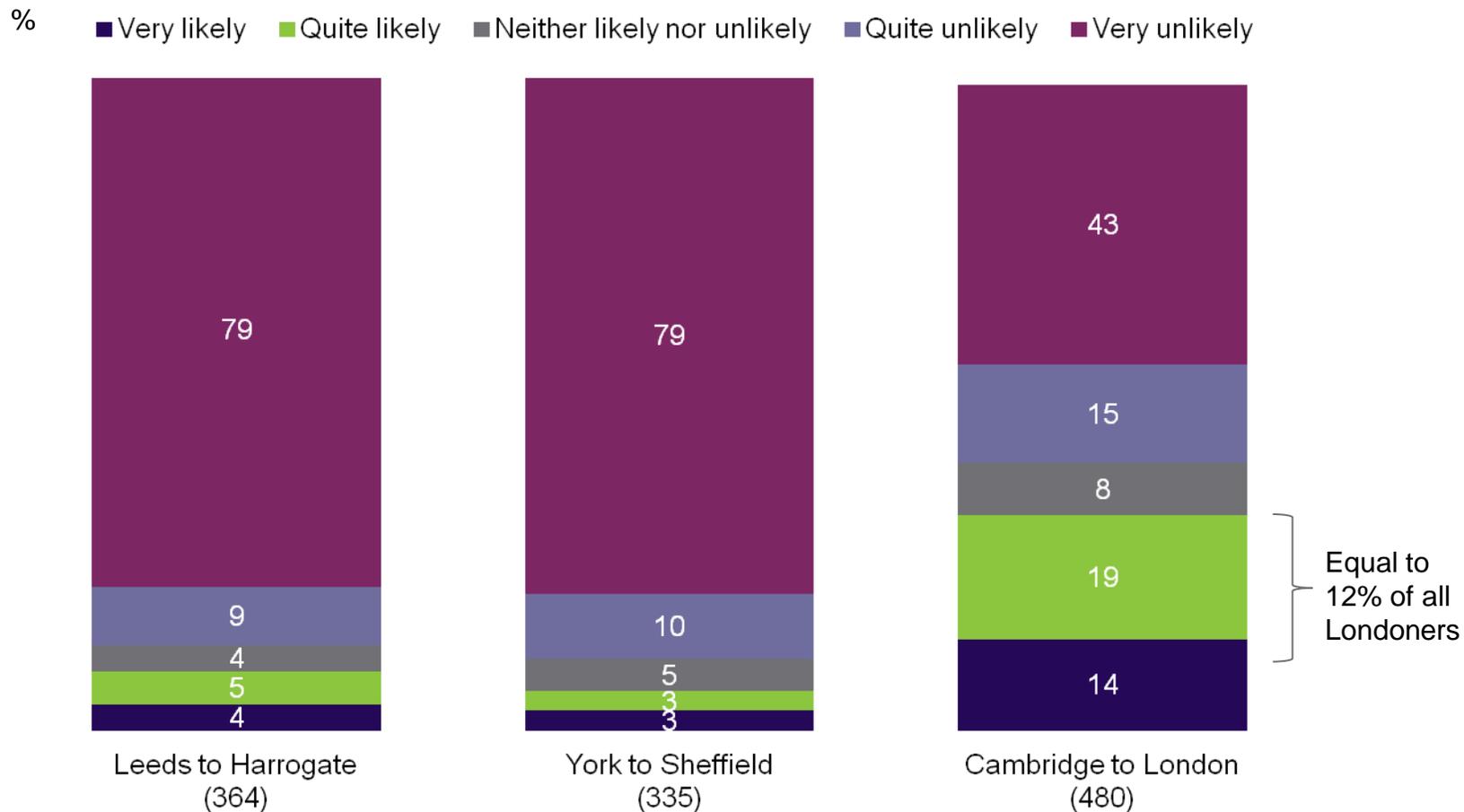
TDF3: Three stages of the Tour de France will take place in England this year, which of the following stages are you aware of?
Base: All respondents aware that parts of the Tour de France will take place in England this year (891)



A third of those aware of the Cambridge to London stage of the Tour de France said they are likely to attend (equal to 12% of all Londoners)

Likelihood of attending Tour de France

All respondents



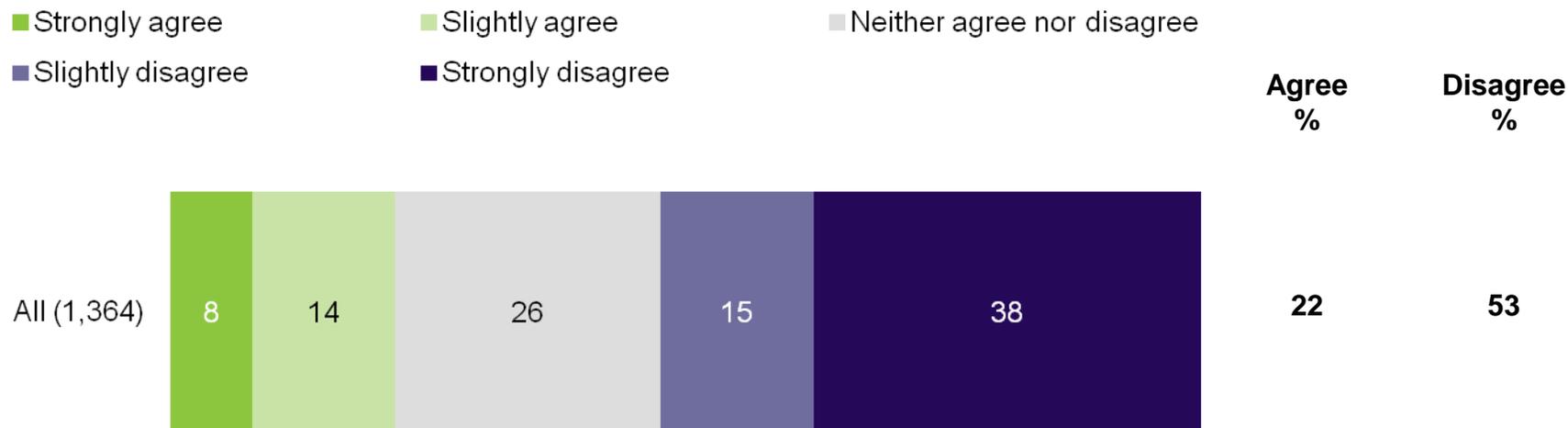
TDF4: How likely are you personally to attend the ... stage?
Base: All respondents aware of each stage (bases in brackets shown above)



Just a fifth agree that famous cyclists motivate them to cycle more, while over half disagree

Motivated by famous cyclists to cycle more

%



Trend data not available due to change in question

Q2012e: To what extent would you agree or disagree that you are motivated to cycle more by famous cyclists such as Mark Cavendish, Victoria Pendleton, Sir Bradley Wiggins and Laura Trott?

Base: All respondents (1,364)



Cycle training





Cycle training

- One fifth of Londoners have attended some form of cycle training, for most this was more than ten years ago. A small few (5%) say they have taken part in training in the last ten years
 - Most common training attended include the old National Cycling Proficiency Test and the school 'Bikeability' training course

- An increasing number of Londoners are aware that local councils offer cycle training to adults, 29% compared to 23% in 2013
 - Awareness is higher among women and 55+ year olds

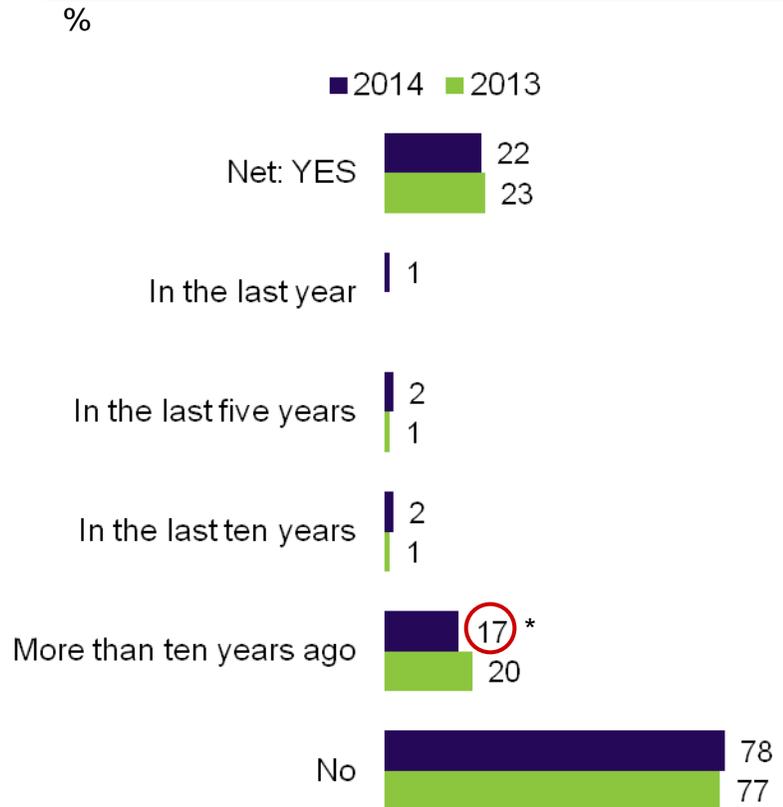
- As seen last year, around one in three Londoners claim they would consider taking cycle training in the future



22% of Londoners have had cycle training, the majority having taken the old national proficiency test, often more than 10 years ago

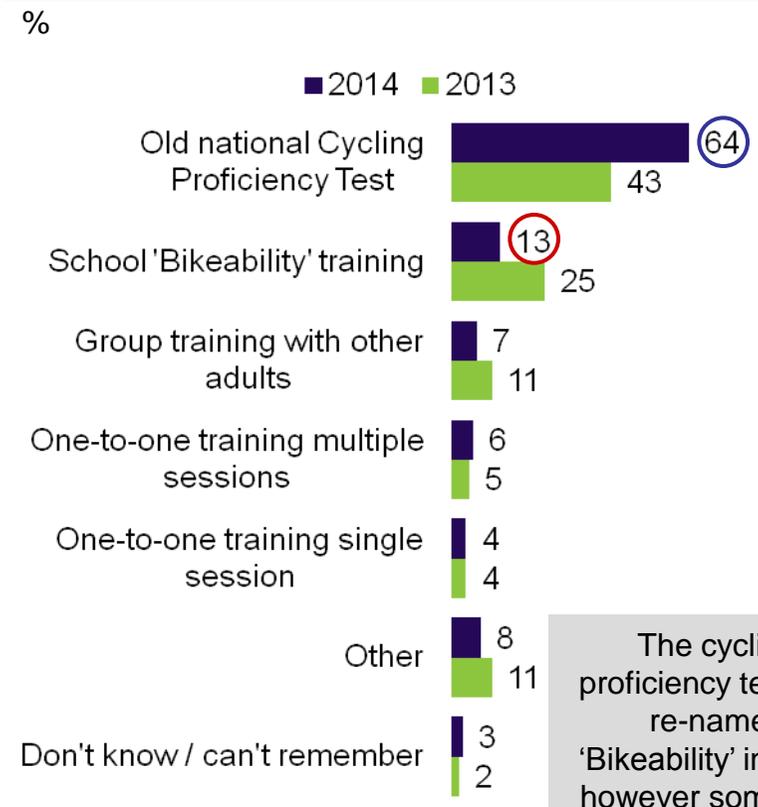
Experience of cycle training

Cycle training attendance



*Difference not significant if 2001 Census weighting applied

Type of cycle training attended



○ Significantly lower than 2013

○ Significantly higher than 2013

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

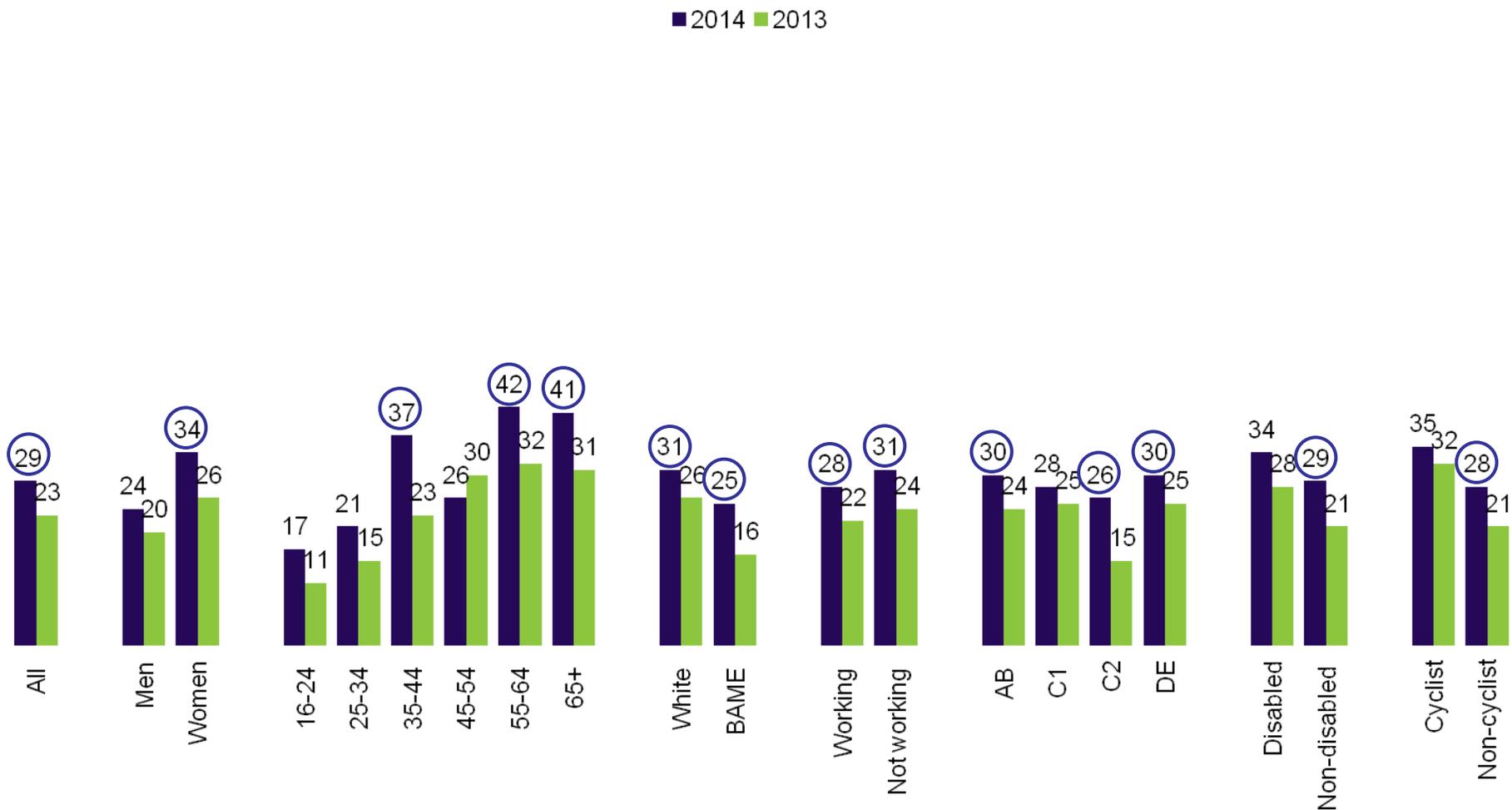
Q1: Have you ever attended any cycle training? Base: all – 2014 (1,364), 2013 (1,373)

Q3: What sort of cycle training did you have? Base: All those who have attended cycle training – 2014 (361), 2013 (340)



An increasing proportion of Londoners (29%) know that most local councils provide adult cycle training

Awareness that local councils offer cycle training for adults



○ Significantly higher than 2013

Q6: Are you aware that most local Councils offer free / discounted cyclist training for adults and children with a qualified instructor?

Base: all (2014: 1,364, 2013: 1,373)



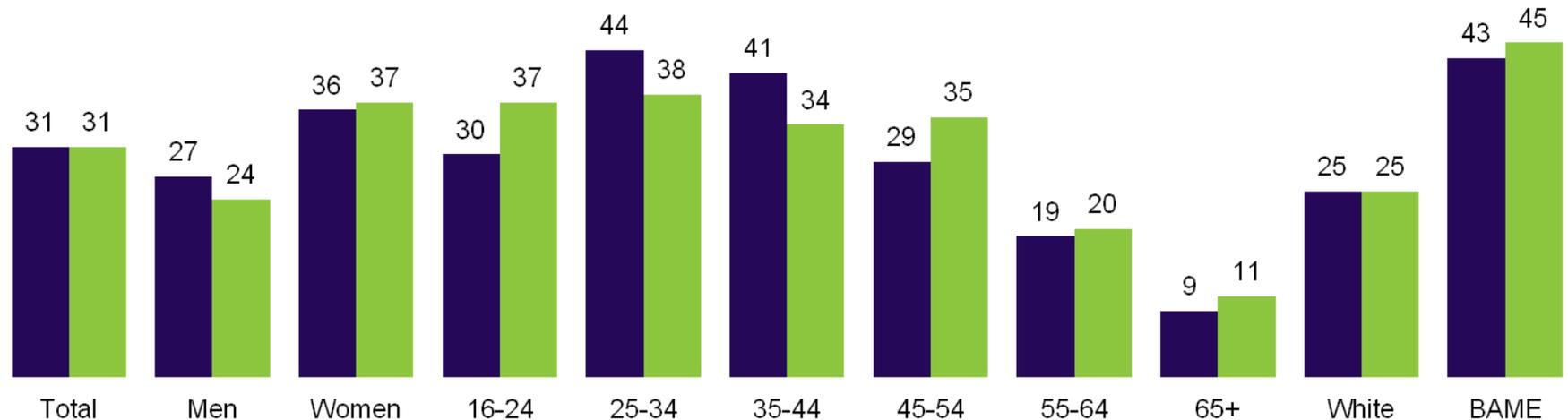
The proportion of Londoners that would consider taking cycle training in the future has remained constant with last year – training is most appealing to women, those aged between 25-44 and BAME Londoners

Propensity to take cycle training in the future

(%)

Would consider taking cycle training in future

■ 2014 ■ 2013



Q4b. Would you consider taking cycle training in the future?

Base: all – 2014 (1,364), 2013 (1,373)

Full responses to this question found in appendix



Investment in cycling





Investment in cycling

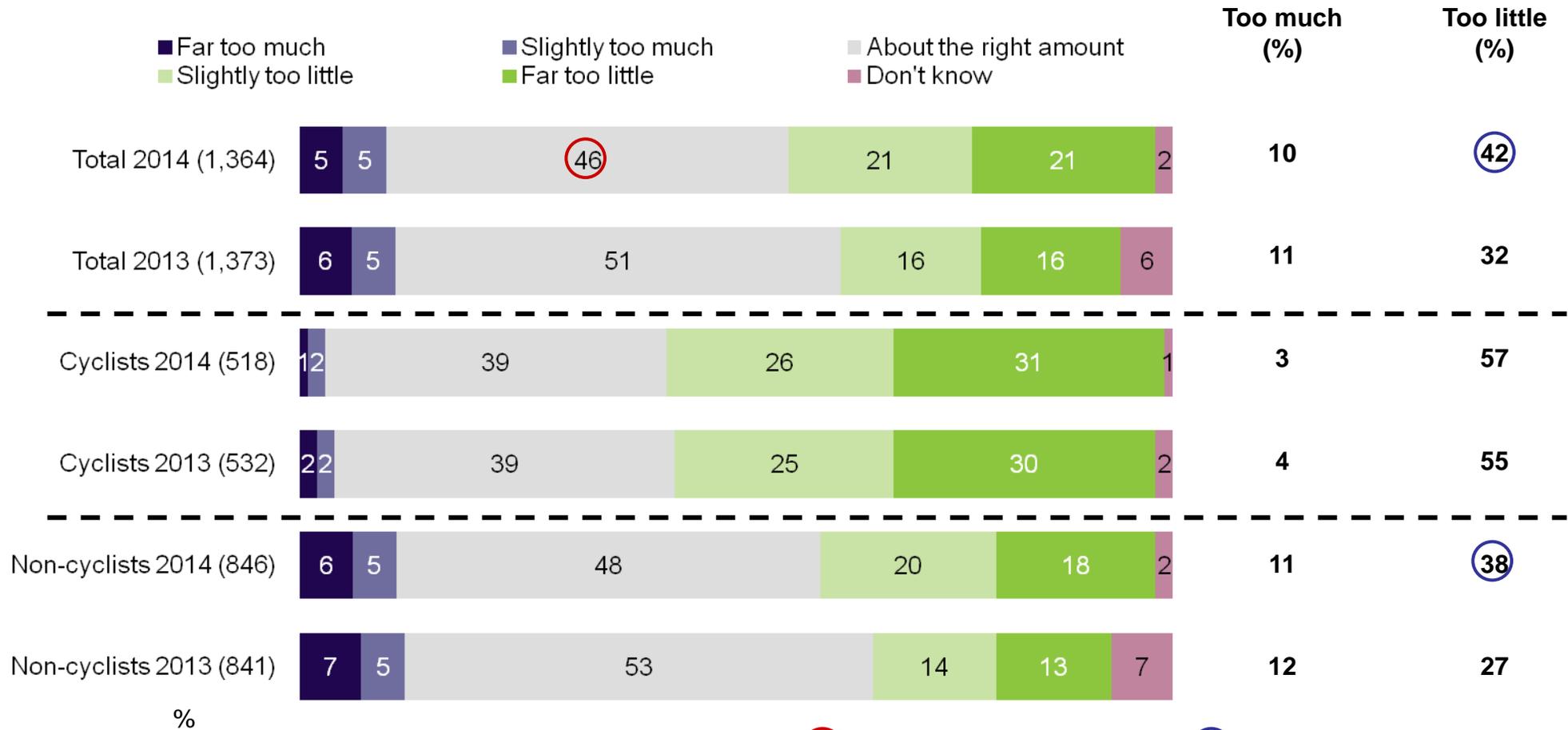
- An increasing proportion of Londoners feel that there is too little investment in cycling (42% compared with 32% in 2013)
 - Cyclists feel most strongly about this (57%), though an increasing amount of non-cyclists feel the same way (38% compared with 27% in 2013)

- 46% of all Londoners are aware of TfL's responsibility to improve cycling conditions in London



Significantly more Londoners (and non-cyclists) think there is too little investment in cycling (training, facilities, infrastructure) compared with last year

Investment levels in cycling



○ Significantly lower than 2013 ○ Significantly higher than 2013

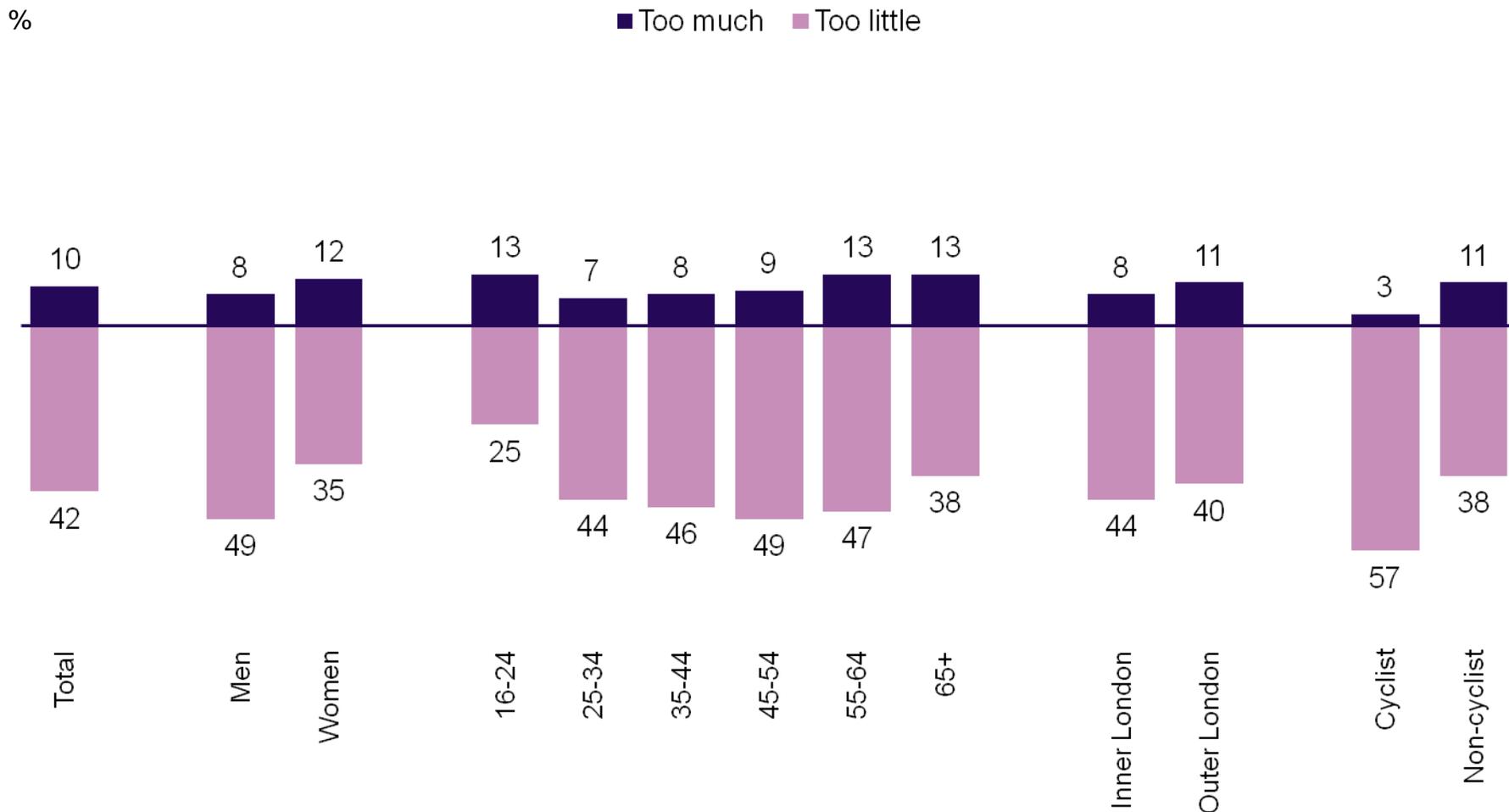
Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount?

Base: all (base sizes in brackets above)



Londoners across all demographic groups are more likely to think there is under-investment rather than overspending on cycling in the Capital

Perception of investment levels in cycling



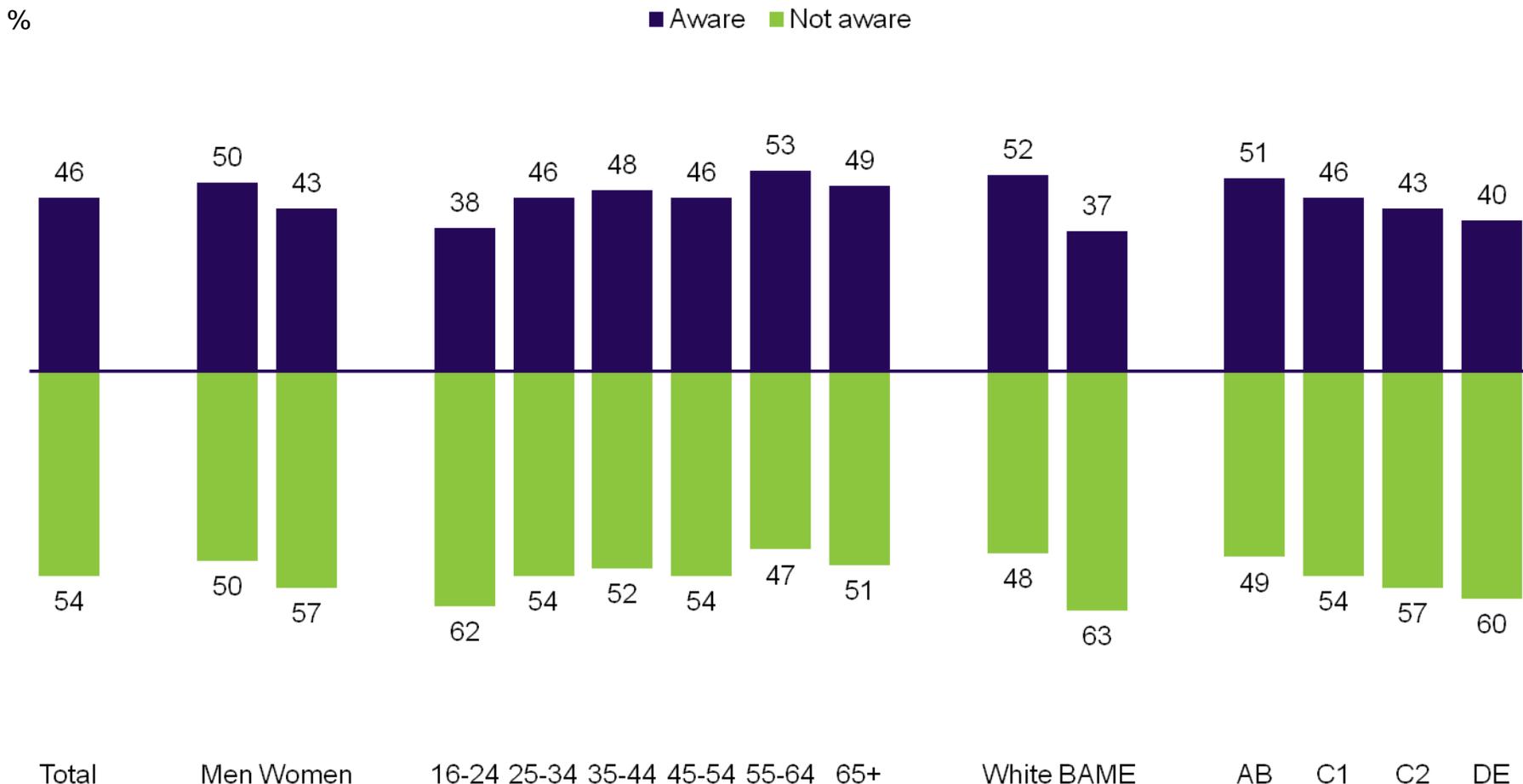
Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount?

Base: All (1,364)



Under half of Londoners know it is the responsibility of TfL to improve cycling conditions in the Capital

Awareness of TfL's responsibility to improve cycling conditions



***New question in 2014**

Q6B: Transport for London is responsible for improving conditions for cycling, including management of Barclays Cycle Hire and Cycle Superhighways, providing guides and maps, providing cycle training and safety advice, providing cycle parking, and improving road conditions and safety for cyclists. Were you aware of this before today? Base: All respondents (1,364)



Cycle crime





Cycle crime

- 56% of Londoners agree there is a lot of cycle crime in London, while two thirds are put off cycling by concerns about bike theft
 - At the time of completing the survey, nearly half of all Londoners claim to have seen news or social media coverage about cycle theft or collisions involving cyclists in the last month, the majority recalling news of collisions
- 14% of Londoners report being a victim of cycle theft in the last couple of years, though only half reported it to the police
- Cycle theft has a considerable impact on cycling behaviour for 56% of victims. While in most cases it has made them more cautious, for a significant few (16%) it has reduced the amount they cycle or even stopped them from cycling altogether
- That said, the majority of Londoners perceive cycling in London and their local area to be safe from crime or antisocial behaviour during the day
 - Cycling at night in local areas is perceived as being increasingly more safe (56% feel that it is safe compared with 52% in 2013)
 - A distinctly smaller proportion (35%) consider cycling around London at night safe
 - 45% of Londoners change their cycling route after dark, mostly to find better lighting or a safe route
- Almost all cyclists lock up their bikes when leaving them, yet only three in ten have their bike marked/registered with the police



Perceptions of safety from crime and anti-social behaviour have held steady this year, though cycling in the local area at night feels slightly safer this year

Safety from crime and anti-social behaviour of cycling in London and local area (trend)

(%) very safe / quite safe



Significantly higher than 2013

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 – 2014 (1,364), 2013 (1,373) 2012 (1,326), 2007-2011 (c1,000)



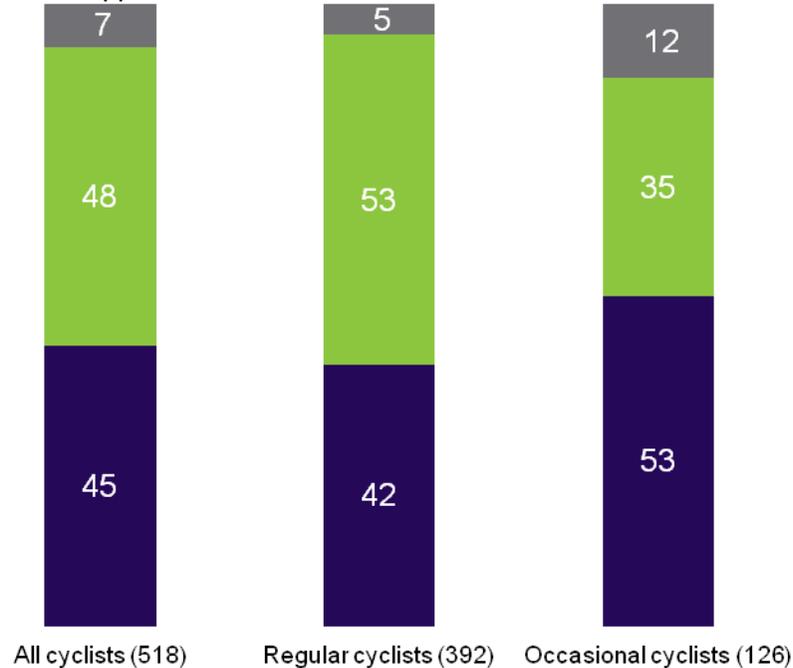
Around half of cyclists change their route after dark, in line with 2013

Change in cycling route after dark



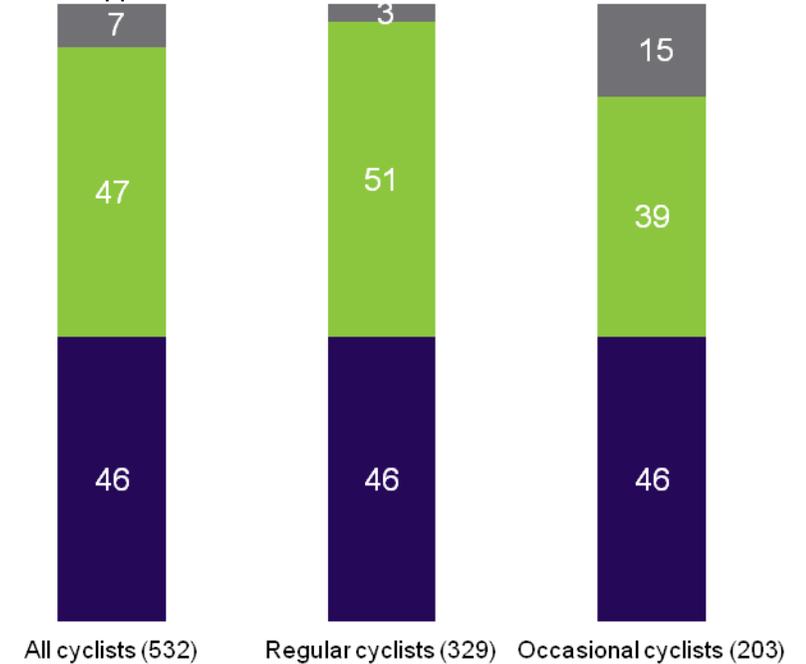
%

■ Change my route after dark ■ Don't change route after dark
■ Not applicable



%

■ Change my route after dark ■ Don't change route after dark
■ Not applicable



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

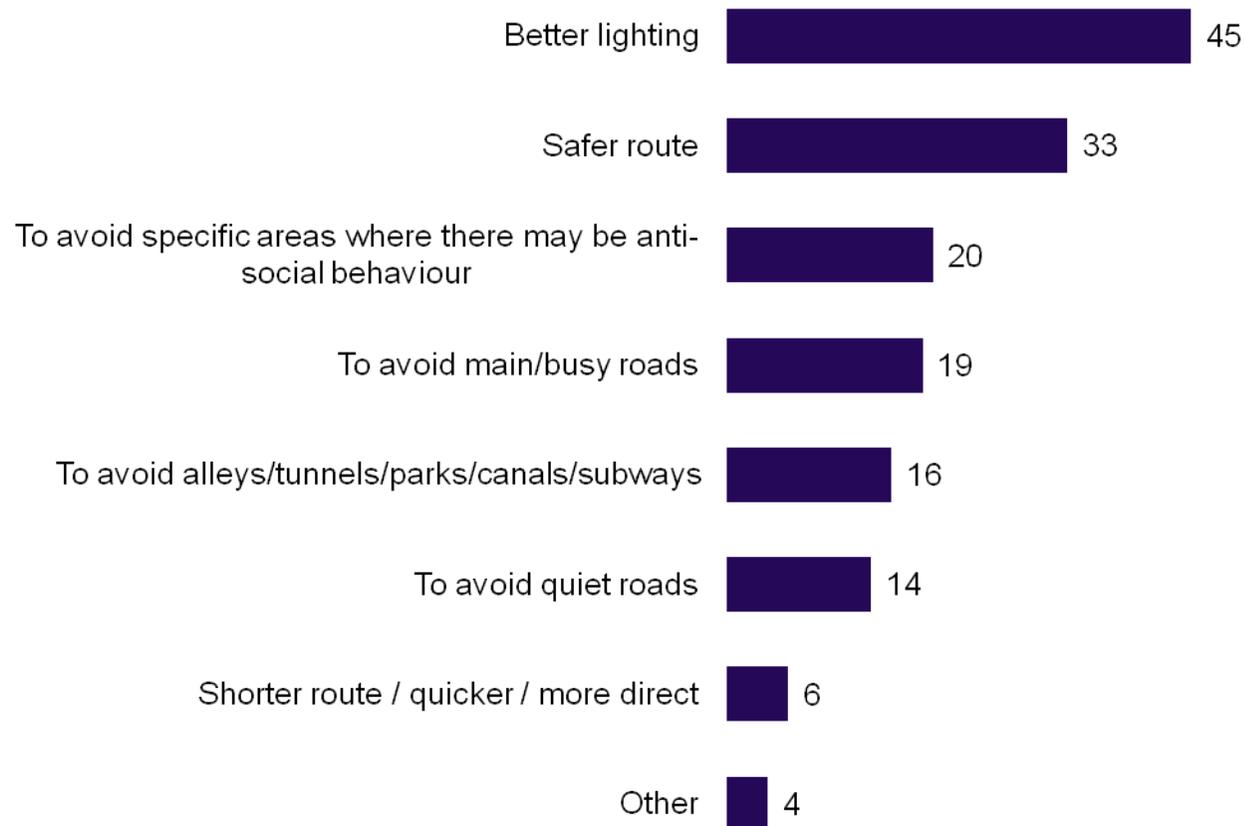
Base: All cyclists – 2014 (518), 2013 (532)



Among those who change their cycling route after dark, the most common reasons are better lighting and to use a safer route

Reasons for change in cycling route after dark

%



Mentions over 5% shown

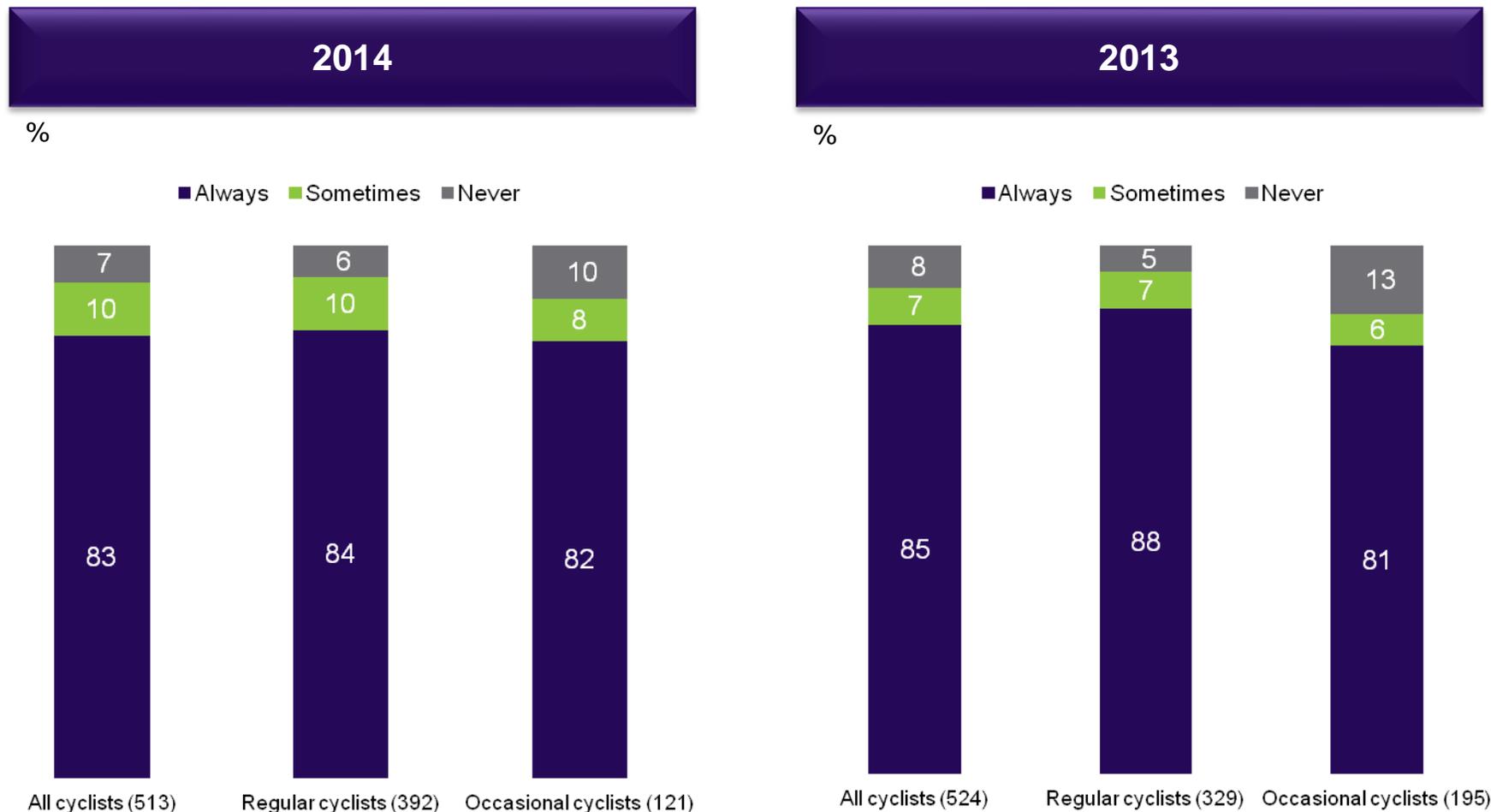
K5a: Why do you change your cycling route when you are travelling in the dark?

Base: All cyclists who change their cycling route when they are travelling in the dark (222)



The vast majority of cyclists lock up their bike when they leave it, consistent with last year

Locking bicycle when out and about

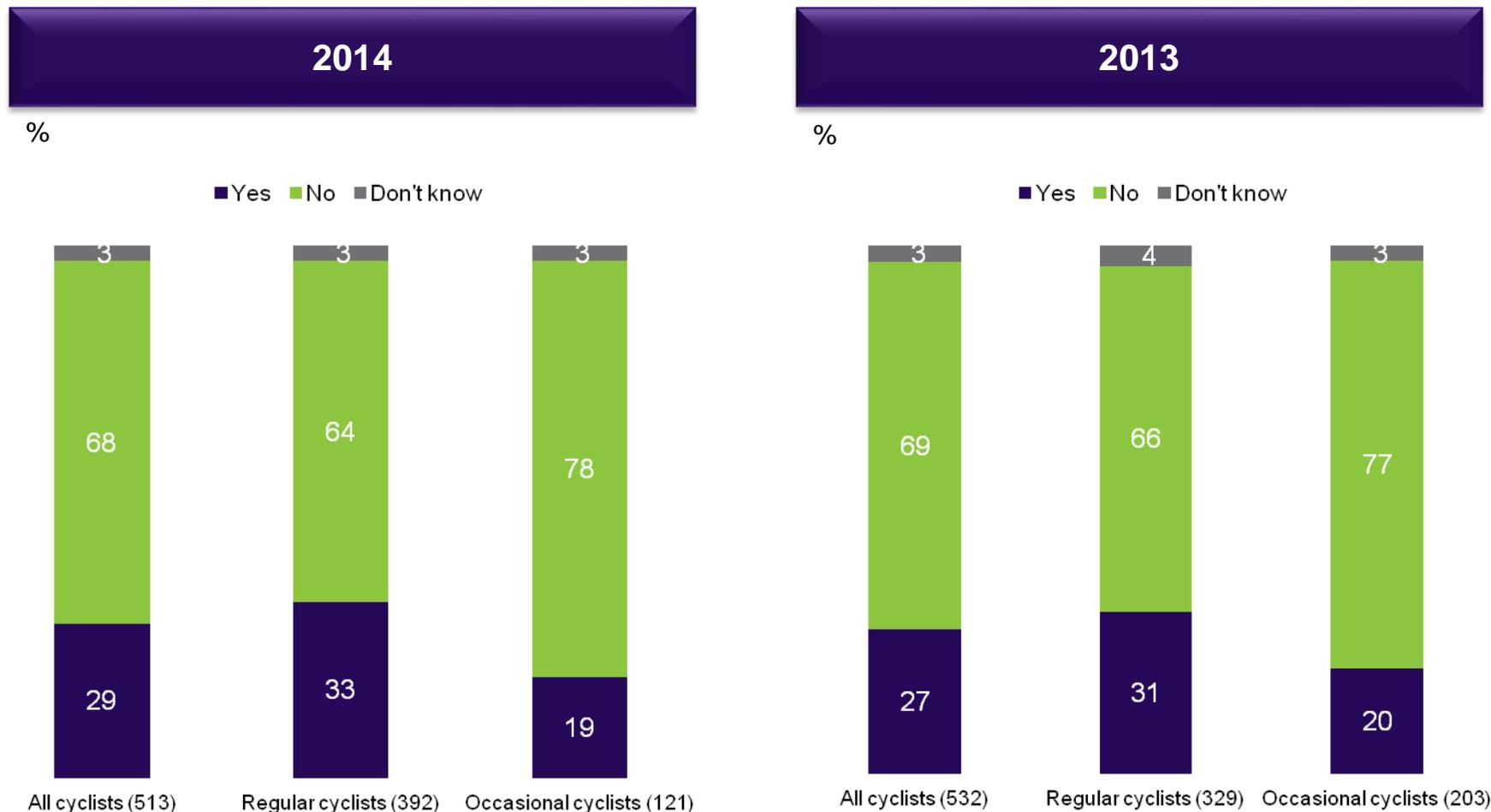


QLOCK1. When you're out and about on the bicycle you have access to how often do you secure it by locking it up?
Base: all cyclists who cycle at least once a month, or less but have access to a bicycle (base sizes in brackets above)



In line with 2013, around a third of regular cyclists have their bicycle marked / registered with the police, falling to a fifth of occasional cyclists

Cycle marking / registration with police



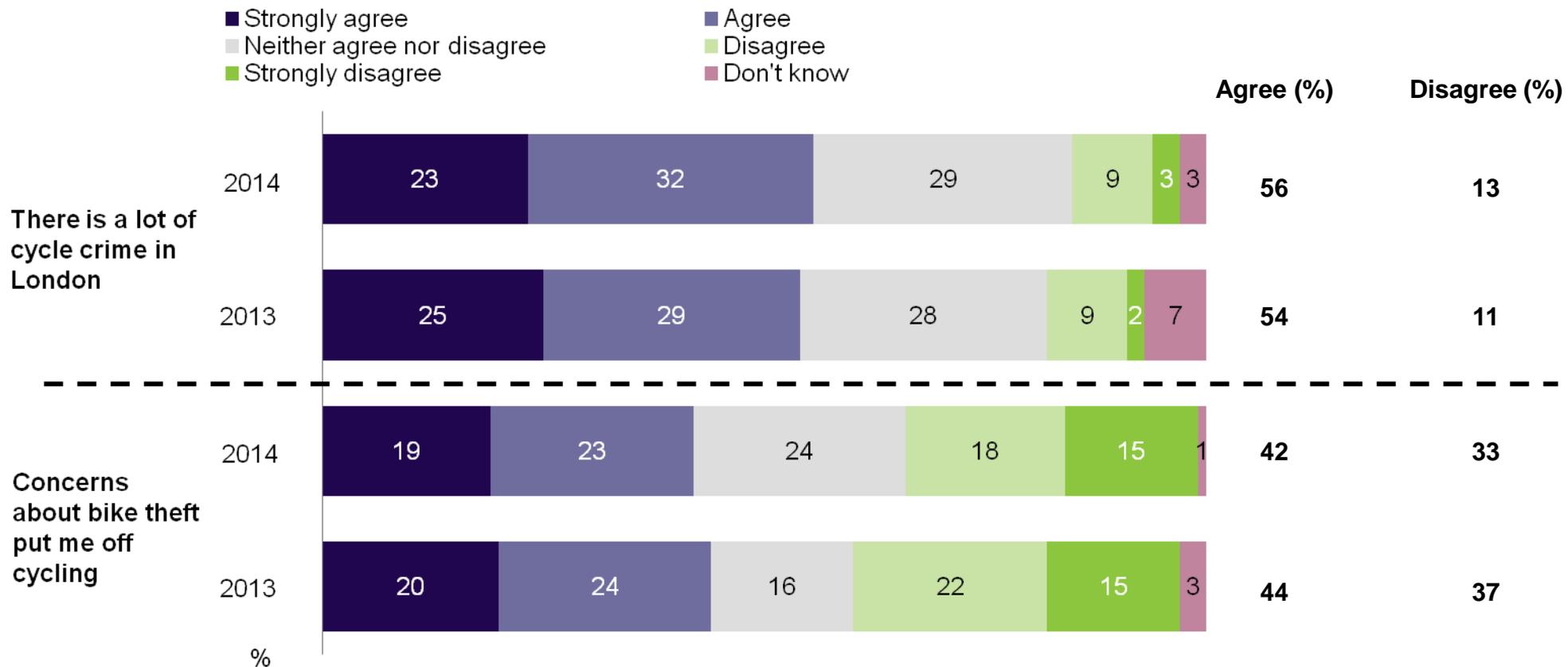
QMARK. Is the bicycle you have access to marked / registered with the police?

Base: all cyclists who cycle at least once a month, or less but have access to a bicycle (base sizes in brackets above)



More than half of Londoners agree that there is a lot of cycle crime in London, and two fifths are put off cycling because of it, in line with 2013

Attitudes towards cycle crime in London



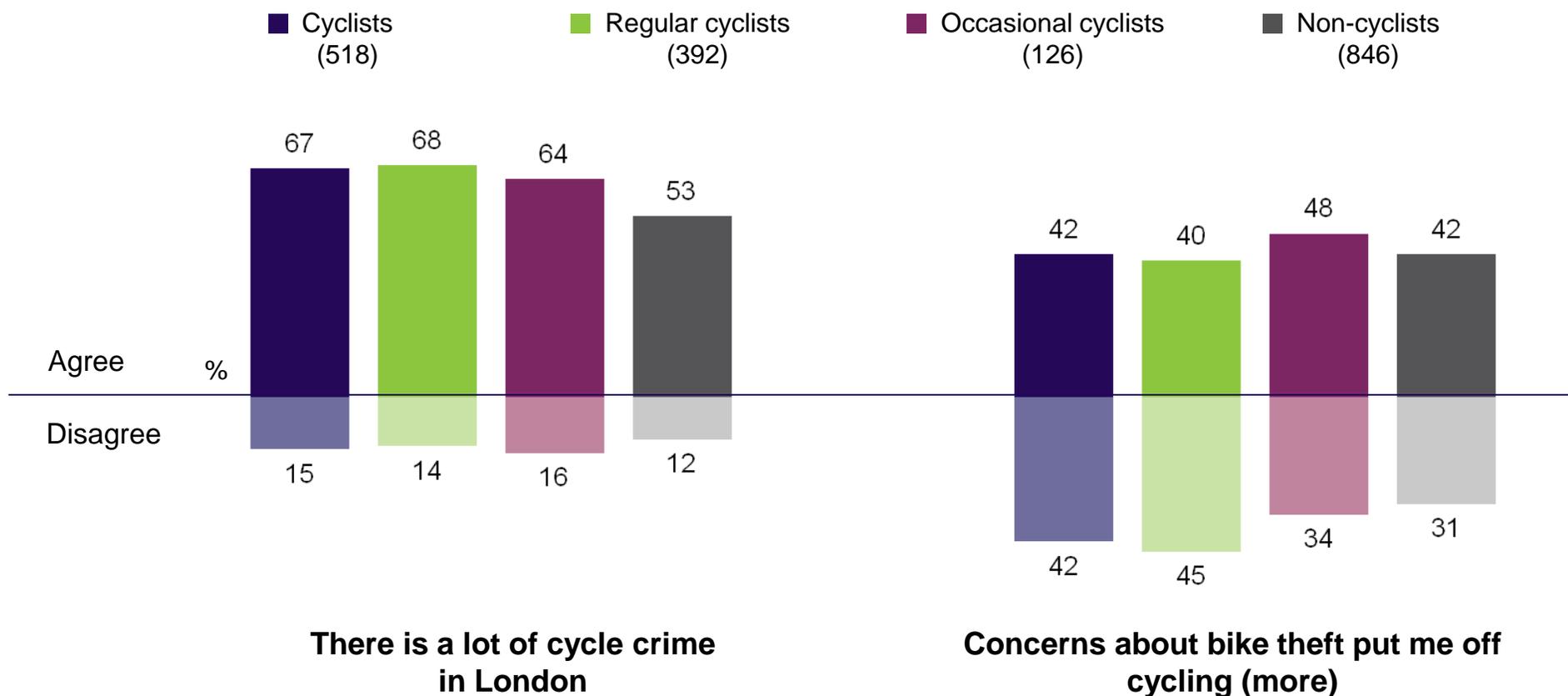
L1: To what extent do you agree or disagree with the following statements about cycle crime in London?

Base: all – 2014 (1,364), 2013 (1,373)



As in 2013, regular cyclists are most likely to agree that there is a lot of cycle crime in London, yet are the least likely to be put off by 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?

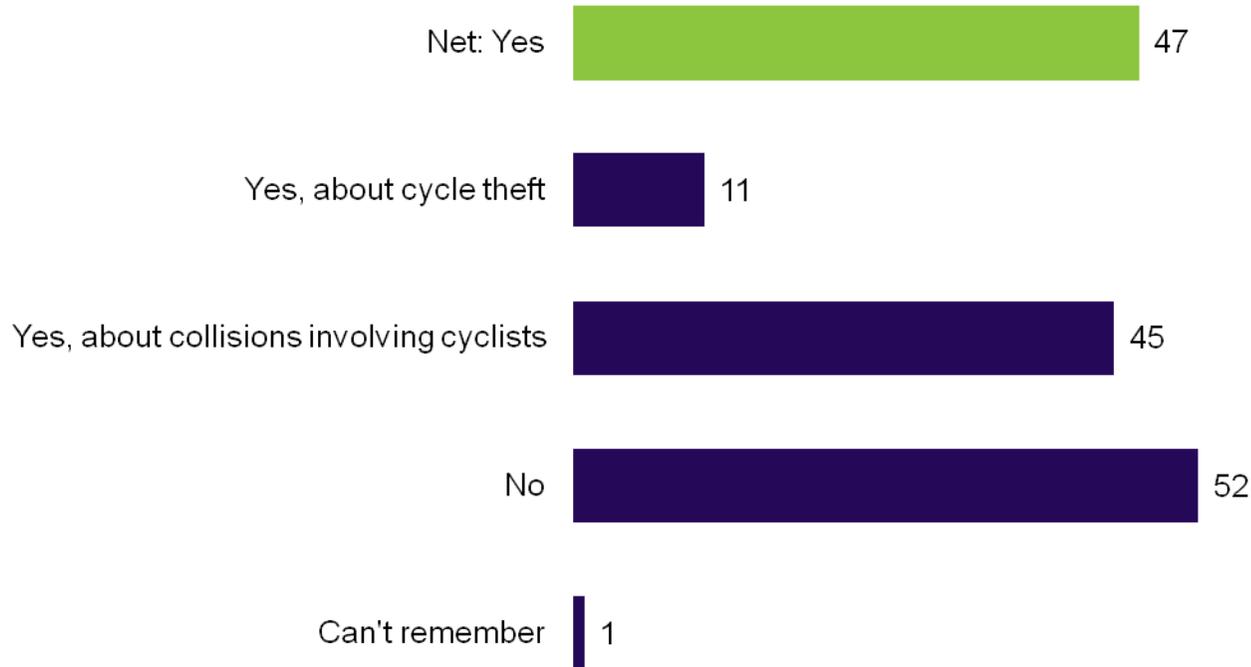
Base: all (1,364)



Just under half of Londoners have seen news or social media coverage about cycle theft or collisions involving cyclists in the last month

News and social media coverage

Seen news or social media coverage about cycle theft or collisions in last month



L4: Have you seen any news or social media coverage about cycle theft or collisions involving cyclists in the last month?

Base: All respondents (1,364)



Compared with 2013, significantly fewer cyclists have had a bike or part of bike stolen over the last couple of years (25%, down from 37%)

Reported incidence of cycle theft

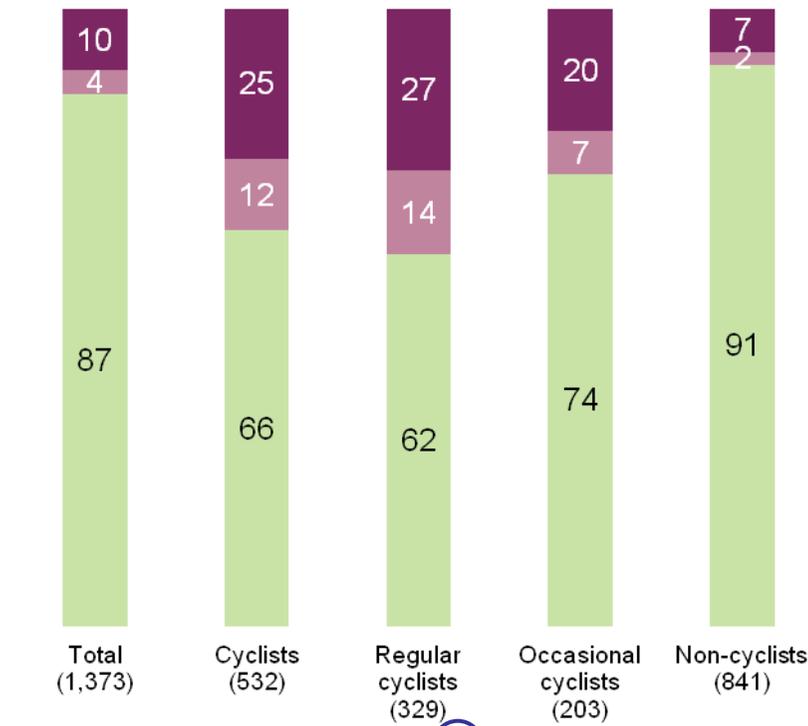
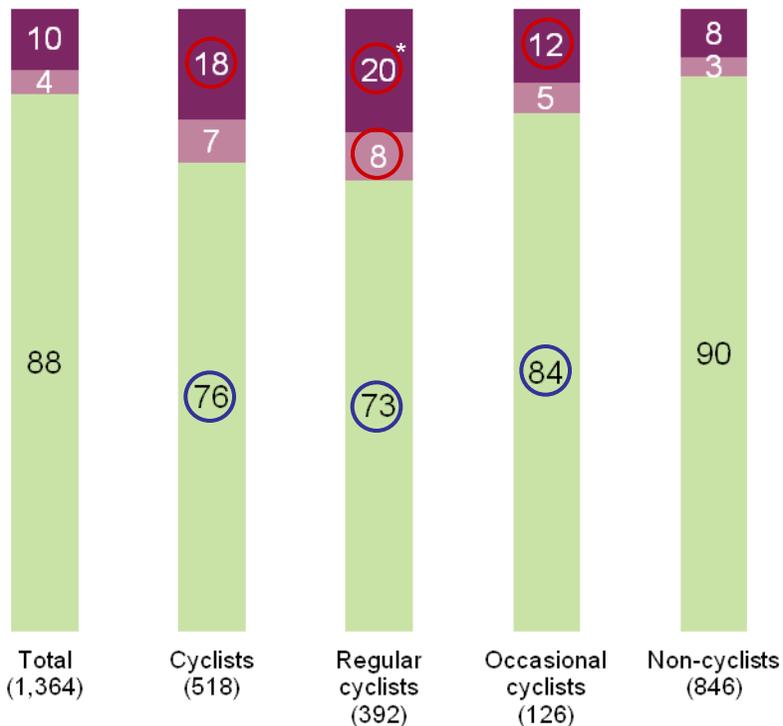


%

%

■ No ■ Yes, part of bike ■ Yes, whole bike

■ No ■ Yes, part of bike ■ Yes, whole bike



*Difference not significant if 2001 Census weighting applied

Significantly lower than 2013

Significantly higher than 2013

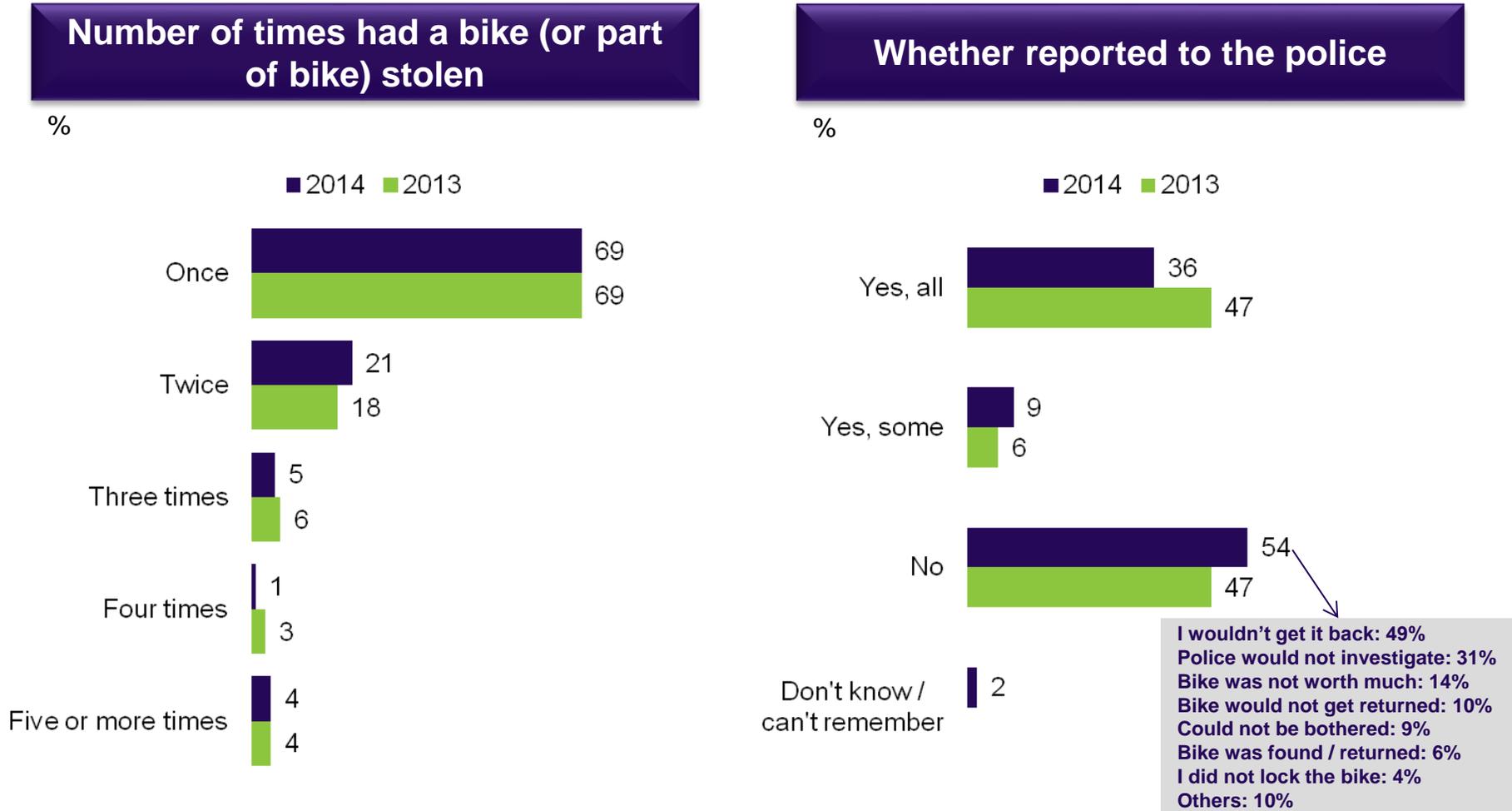
L5: In the last couple of years, have you ever had a bike - or part of a bike - stolen?

Base: all - 2014 (1,364), 2013 (1,373)



Three in ten of those to have experienced cycle theft have done so more than once, with just under half reporting the incident to police

Number of cycle thefts experienced, and whether reported to police



L6: How many times has this happened to you (in the last couple of years)? Base: all who have had (part of) bike stolen – 2014 (179), 2013 (223)

L7: Did you report any of these incidents/the incident to the police? Base: all who have had (part of) bike stolen – 2014 (179), 2013 (223)

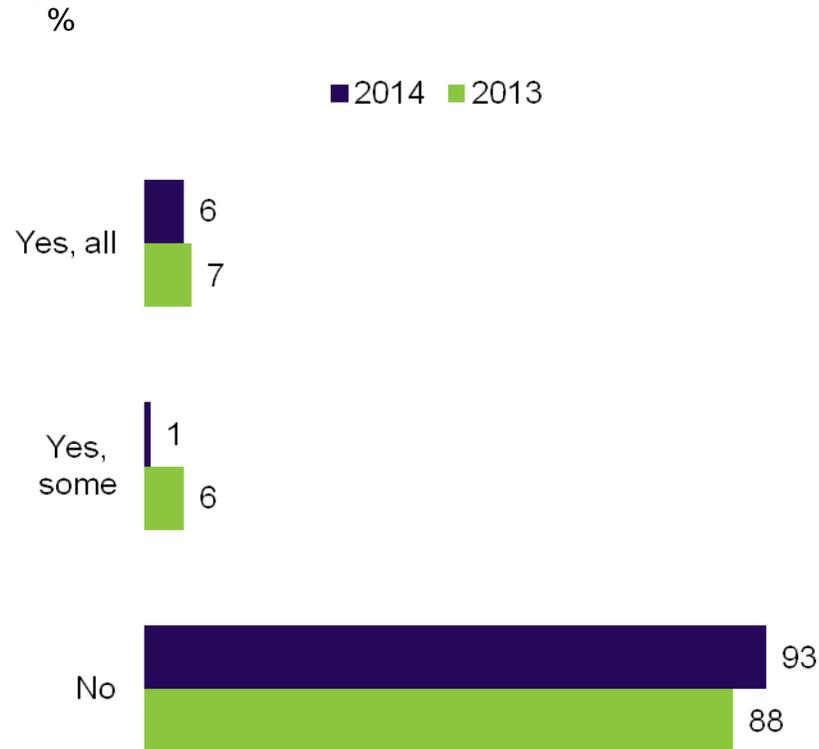
L9: Why didn't you report (all of) the incident(s) to the police? Base: all not reporting it to the police – 2014 (91), 2013 (111)



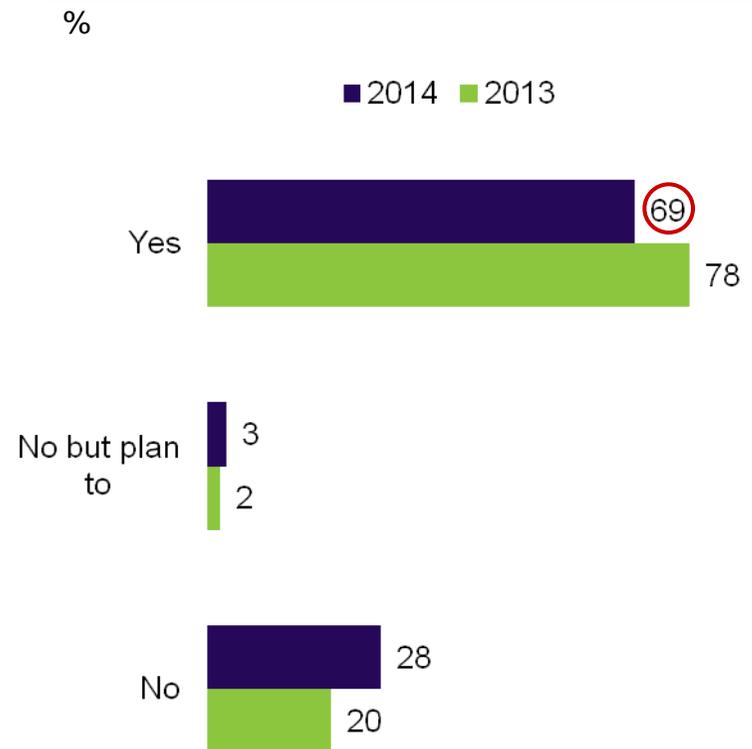
Very few stolen items were recovered. While the majority were replaced, the proportion is significantly lower than in 2013

Whether stolen items were recovered / replaced

Whether recovered items that were stolen



Whether replaced the items not recovered



 Significantly lower than 2013

L10: Did you recover the items that were stolen? Base: Those who have had a bike stolen – 2014 (179), 2013 (223)

L11: Did you replace the items that you did not recover? Base: Those who have had a bike stolen and haven't recovered – 2014 (172), 2013 (212)



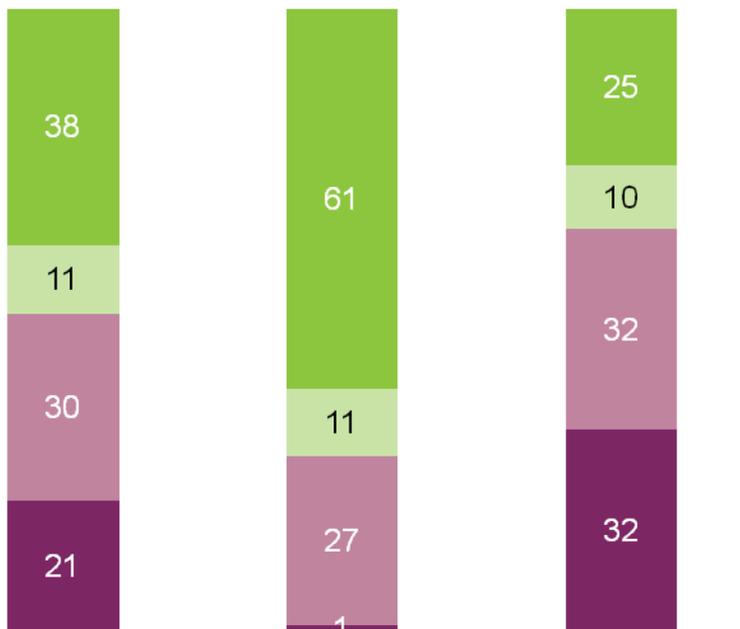
Cycle theft has had an impact on levels of cycling, with 30% of victims stopping temporarily and 21% giving up cycling completely as a result

Impact of cycle theft on level of cycling



%

- Stopped cycling altogether
- Stopped cycling temporarily
- Still cycle, but less
- Still cycle as much



Total (179)

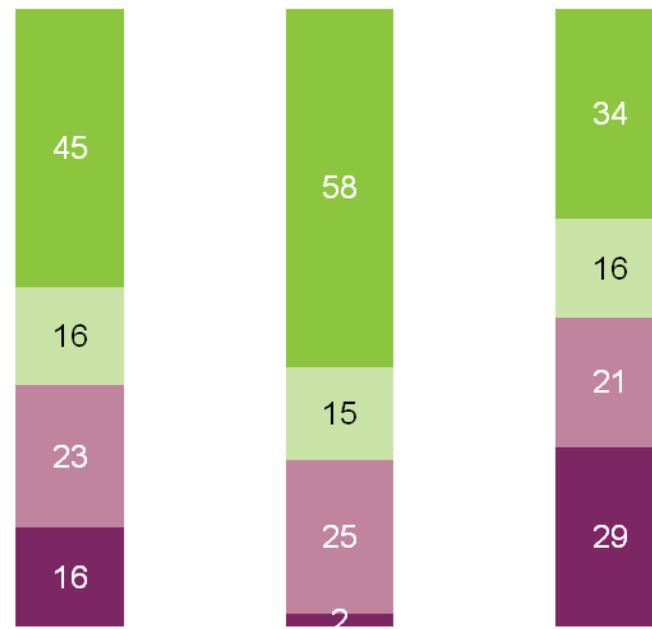
Cyclists (125)

Non-cyclists (54)



%

- Stopped cycling altogether
- Stopped cycling temporarily
- Still cycle, but less
- Still cycle as much



Total (223)

Cyclists (160)

Non-cyclists (63)

L12: What impact did being a victim of theft have on your level of cycling?

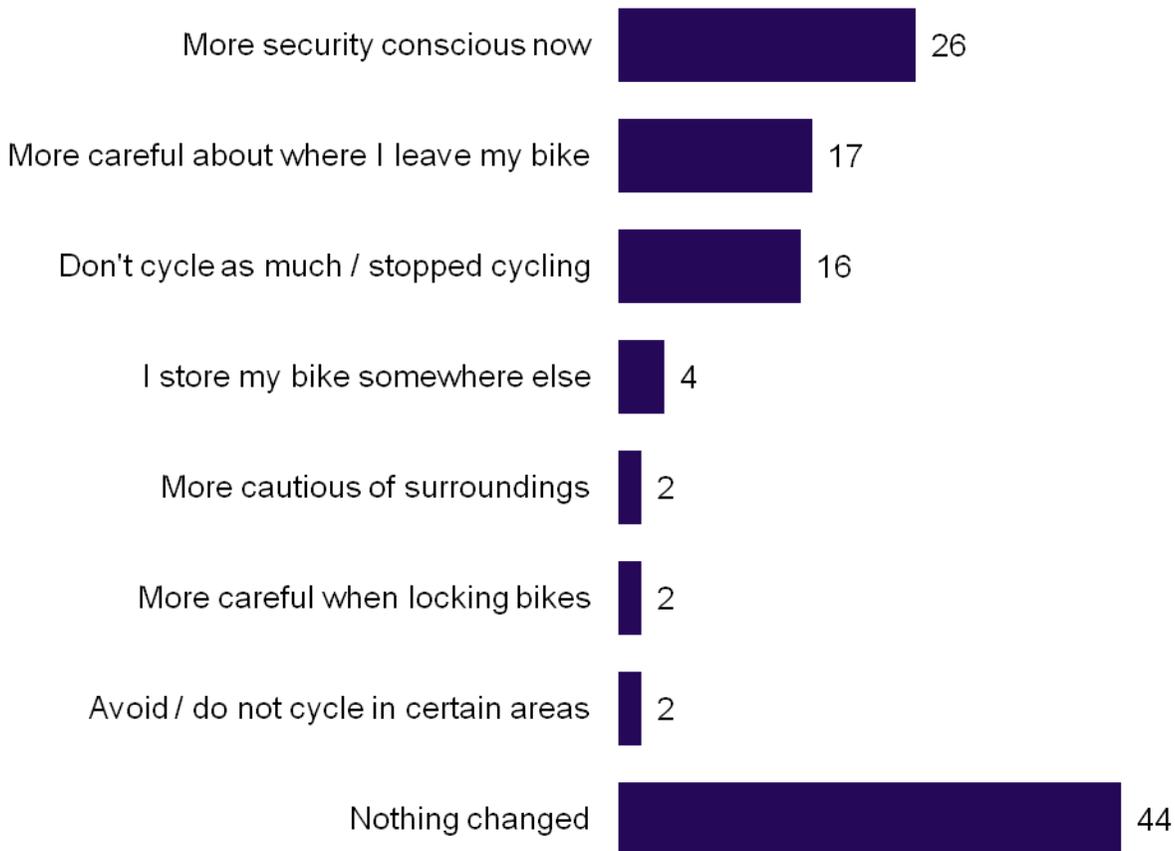
Base: Those who have had a bike stolen – 2014 (179), 2013 (223)



However, nearly half of those who have been a victim of cycle theft say that it has not changed anything about the way they approach cycling

Behavioural change as a result of cycle theft

%



Trend data not available due to change of pre-codes

Mentions over 1% shown

L13: Did being a victim of bike theft change anything about the way that you cycle?

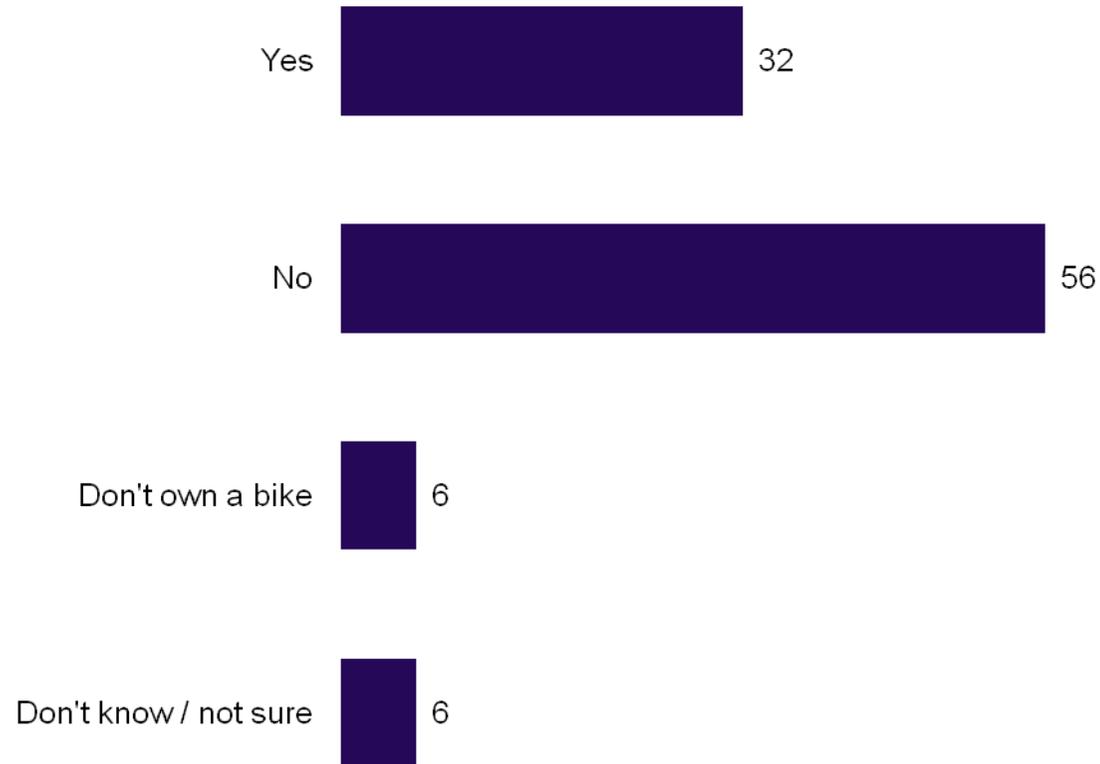
Base: Those who have had a bike stolen (179)



Among those who have access to a bike, more than half have not insured it against theft

Cycle insurance

%



L14: Is your bike insured against theft? If you have more than one bike, please think about the bike that you use most often.
Base: All respondents who have access to a bike (818)



Cycling confidence





Cycling confidence

- There is a perception that cycling in London is becoming less safe
 - A significantly higher proportion of cyclists think that cycling in London is becoming more dangerous (22% compared with 15%)
 - At the same time, a smaller proportion feel that cycling is becoming more safe (30% compared with 36%)

- Around half of all cyclists feel less confident when cycling on busy roads, and other situations are having more impact on cycling confidence. These include cycling at junctions, near buses, in bad weather, where there are no cycle lanes and in the centre of London

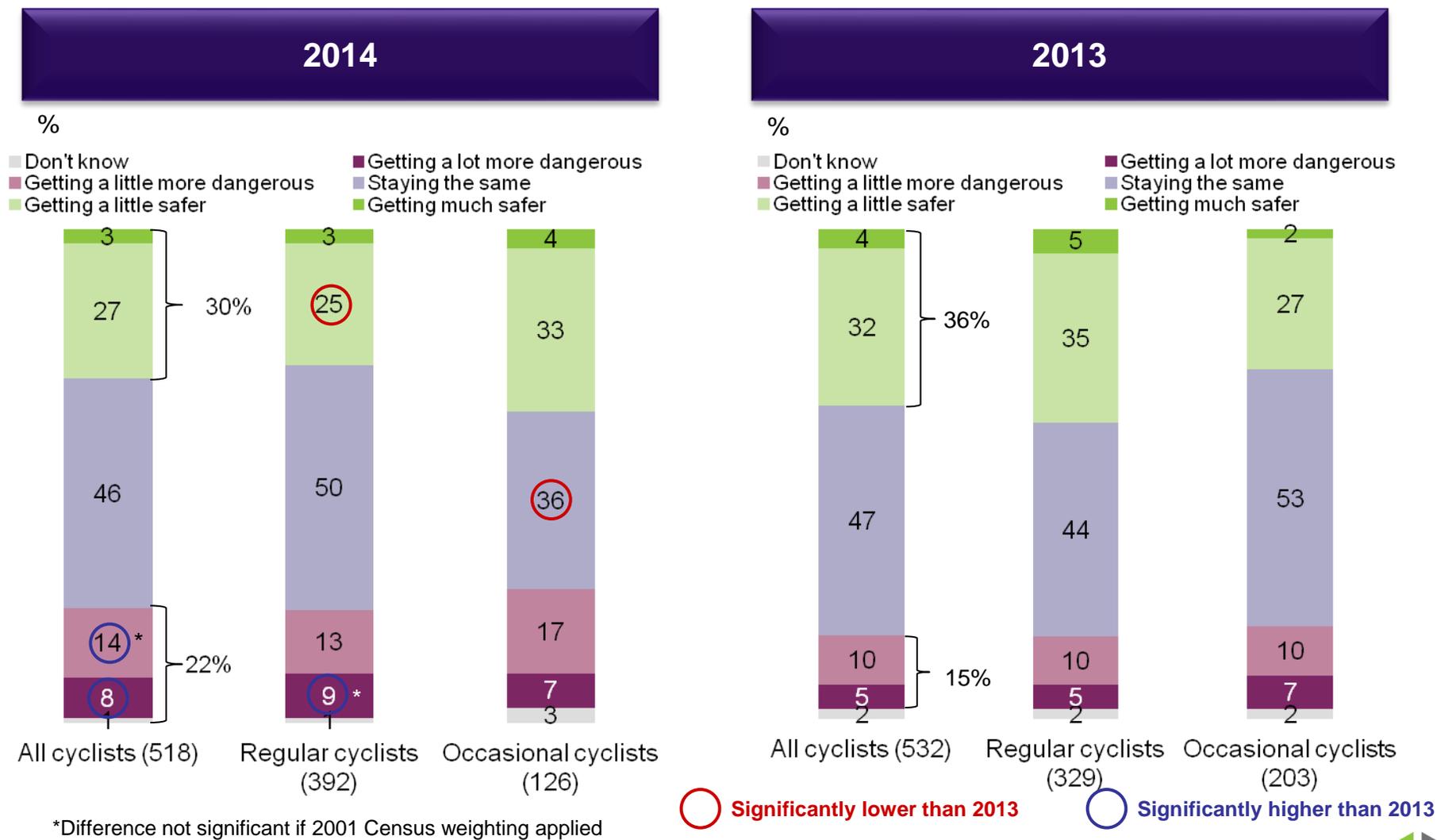
- Inadvisable or unlawful behaviour has been undertaken by most cyclists at some point. Half of all cyclists have cycled on pavements, cycled without a helmet and cycled without high visibility clothing after dark

- Two thirds of cyclists are aware of Transport for London's Cycle Journey Planner, 38% of cyclists have used it
 - 61% of cyclists are likely to use it in the next year



Compared with last year, significantly more cyclists think that cycling around London is getting more dangerous while fewer think it is getting safer

Perceptions of increased safety for cycling



J5: Do you think cycling around London is getting safer, getting more dangerous, or staying the same?

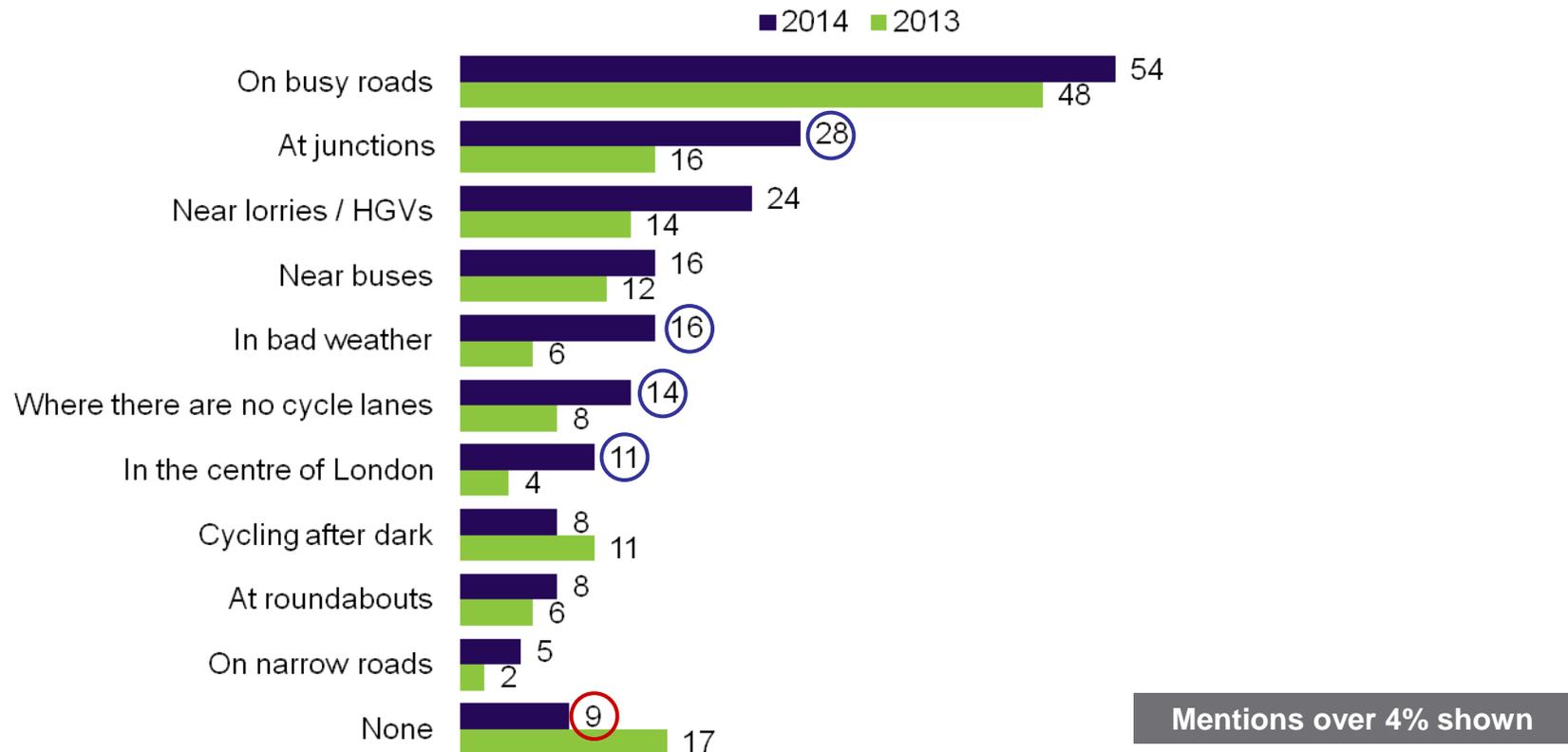
Base: All cyclists – 2014 (518), 2013 (532)



Cyclists are more likely this year to feel less confident in certain situations, most notably at junctions, near HGVs and in bad weather

Situations in which cyclists feel less confident

%



○ Significantly lower than 2013

○ Significantly higher than 2013

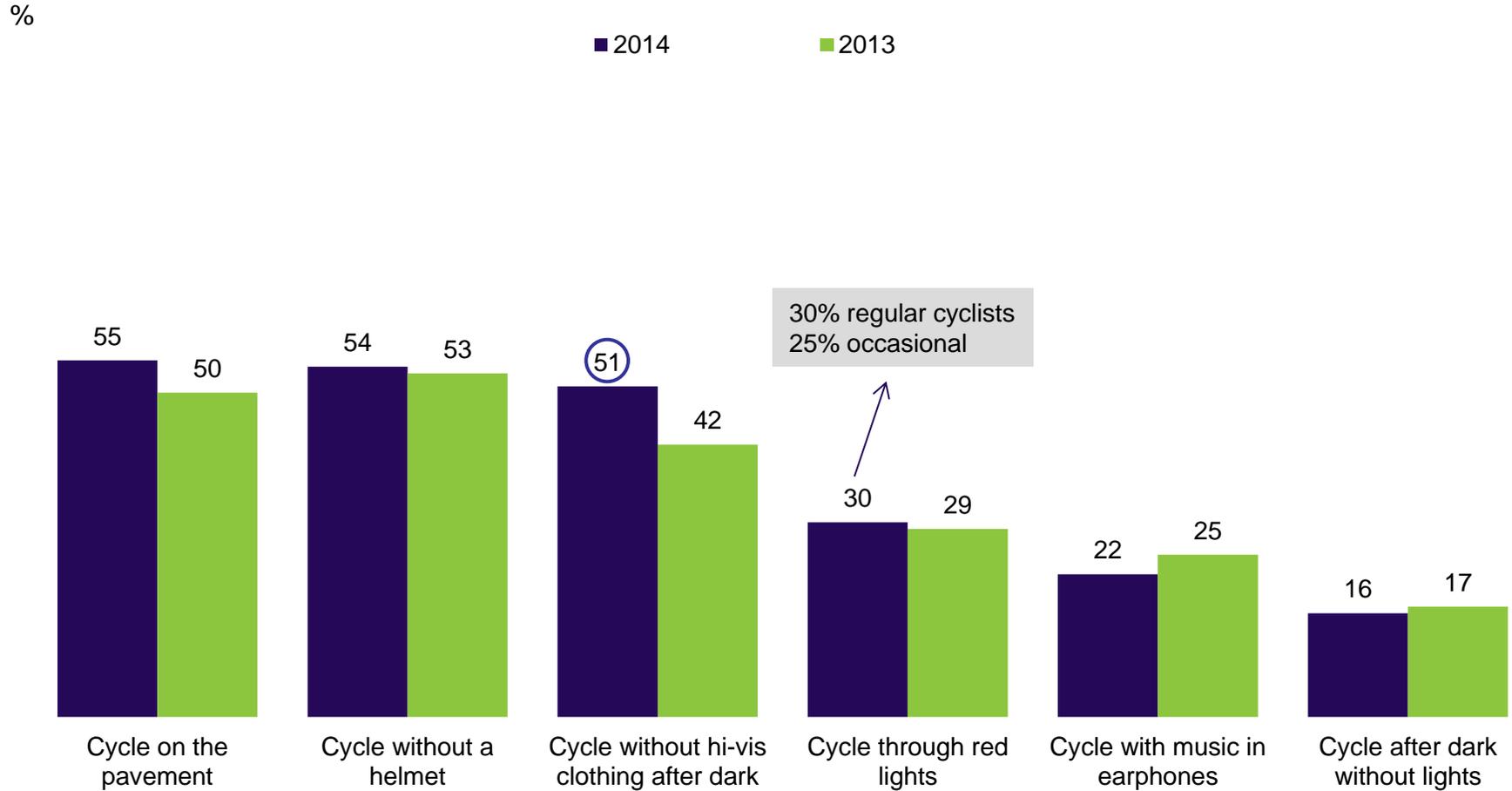
J2: Are there any situations where you feel less confident when cycling?

Base: All cyclists – 2014 (518), 2013 (532)



'Inadvisable' or unlawful behaviour has been undertaken by most cyclists at some point – significantly more said they cycle without hi-vis clothing after dark compared with last year

Prevalence of 'cycling behaviours'



○ Significantly higher than 2013

J4: While cycling in London, do you ever do any of the following?

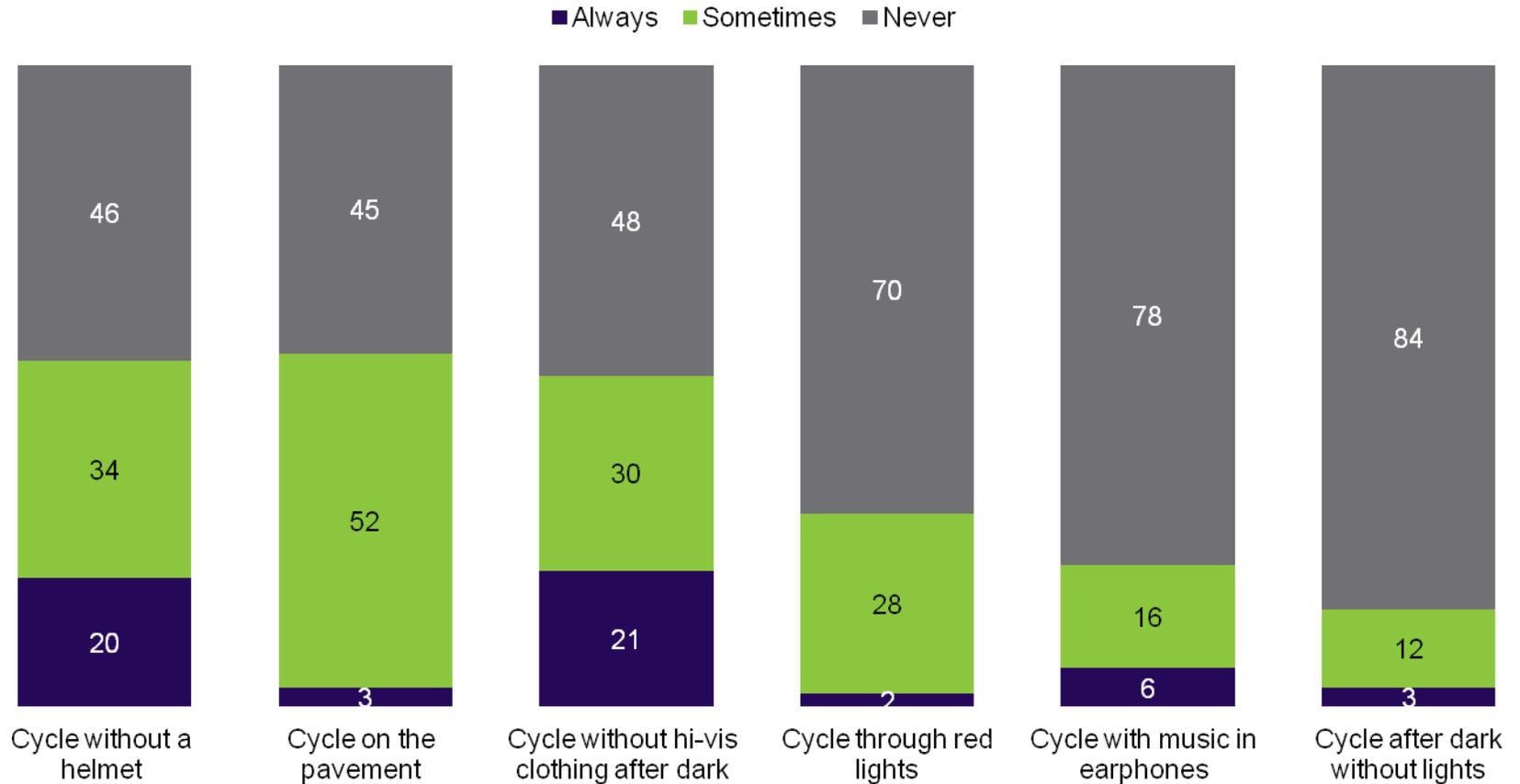
Base: all cyclists – 2014 (518), 2013 (532)



Two in ten state that they always cycle without a helmet, or without hi-vis clothing after dark

Prevalence of 'cycling behaviours'

%



J4: How often do you ...?

Base: all cyclists (518)

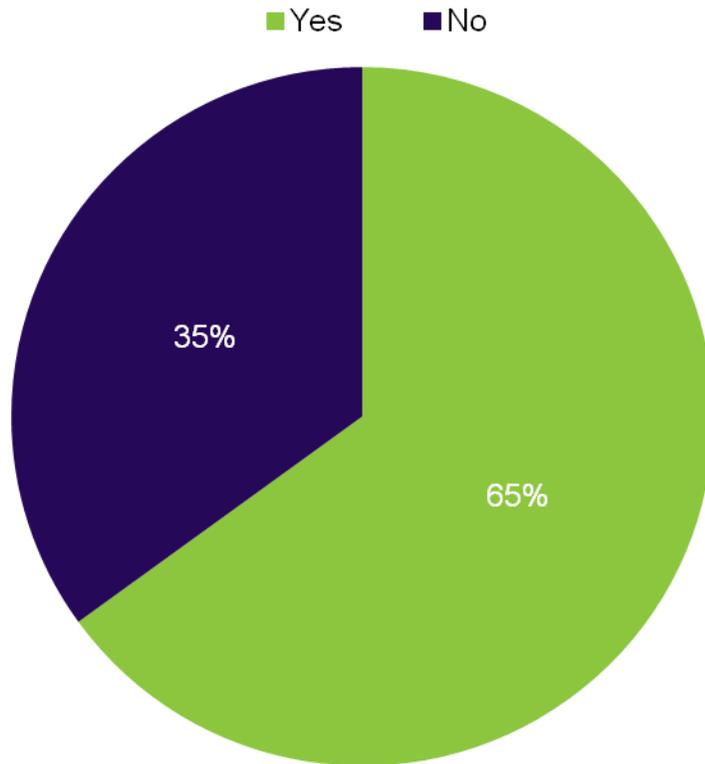


Two in three cyclists are aware of the Cycle Journey Planner and of those, three fifths have used it

Awareness of TfL Cycle Journey Planner

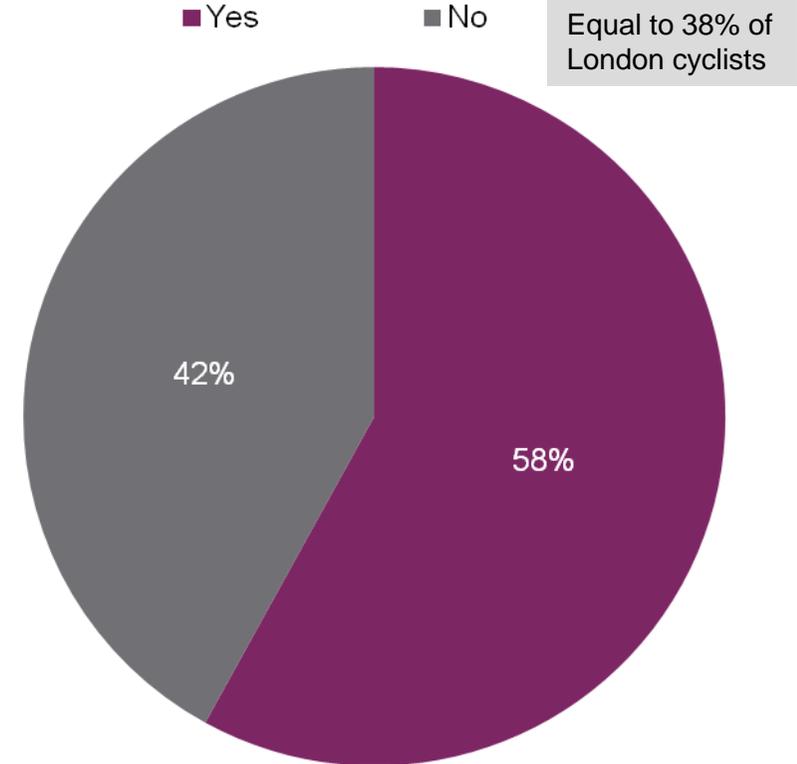
Awareness of TfL Cycle Journey Planner

%



Ever used the TfL Cycle Journey Planner

%



New question in 2014

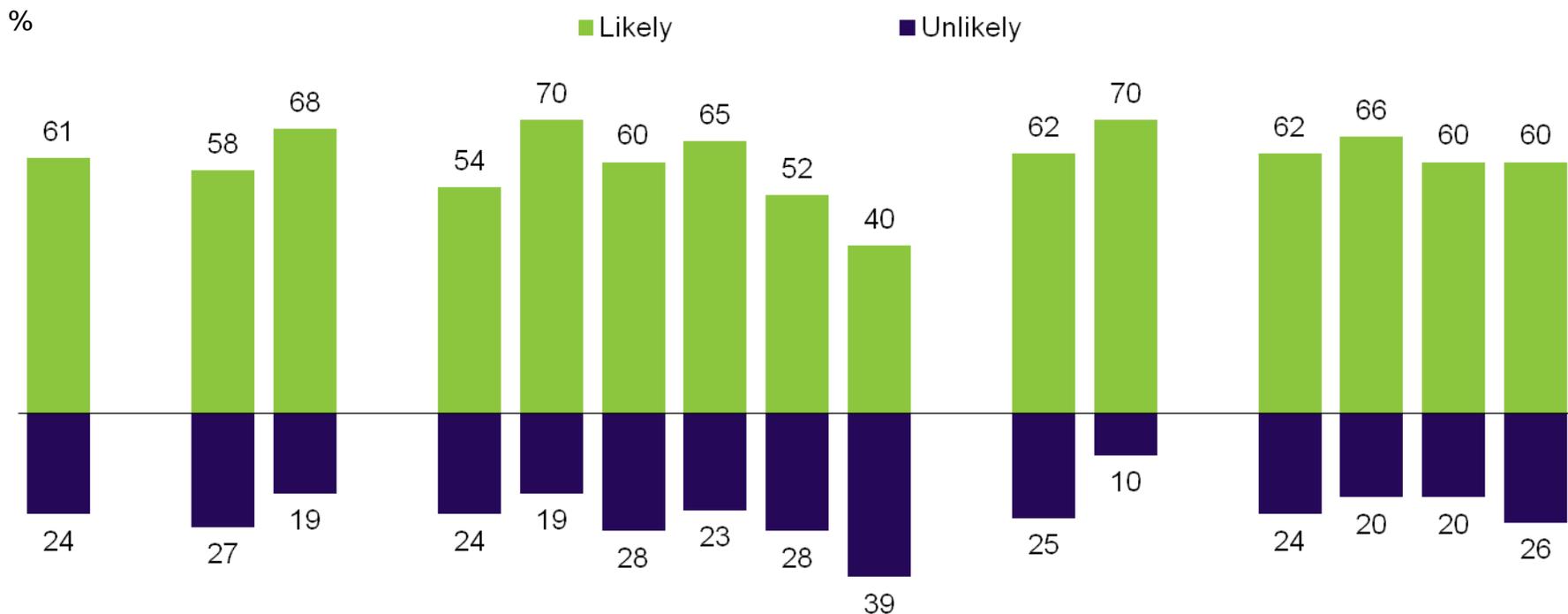
JP1: Are you aware that Transport for London has a version of Journey Planner for cycling on its website? Base: All cyclists (518)

JP2: Have you ever used the TfL Cycle Journey Planner? Base: All cyclists aware of the Journey Planner for cycling (312)



Three in five cyclists are likely to use the Cycle Journey Planner in the next 12 months

Likelihood of using the Cycle Journey Planner in the next 12 months



Not sure

14 15 13 22 12 12 12 20 21 13 20 13 14 19 14

Total Men Women 16-24 25-34 35-44 45-54 55-64 65+ White BAME AB C1 C2 DE

New question in 2014

JP3: How likely are you to use the Cycle Journey Planner in the next 12 months?

Base: All cyclists (518)



Appendix





Appendix

Methodology

- The research comprised 1,000 telephone interviews with adult Londoners, plus 364 further interviews with cyclists to boost the total sample of cyclists to 518
- Fieldwork took place in April and May 2014
- 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 2011 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 was 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	25%
35-44	19%
45-54	16%
55-64	11%
65+	14%
Ethnicity	
White	61%
BAME	36%

Variable	%
Working status	
Working	61%
Not-working	39%
Social class	
A	13%
B	31%
C1	26%
C2	10%
D	7%
E	9%

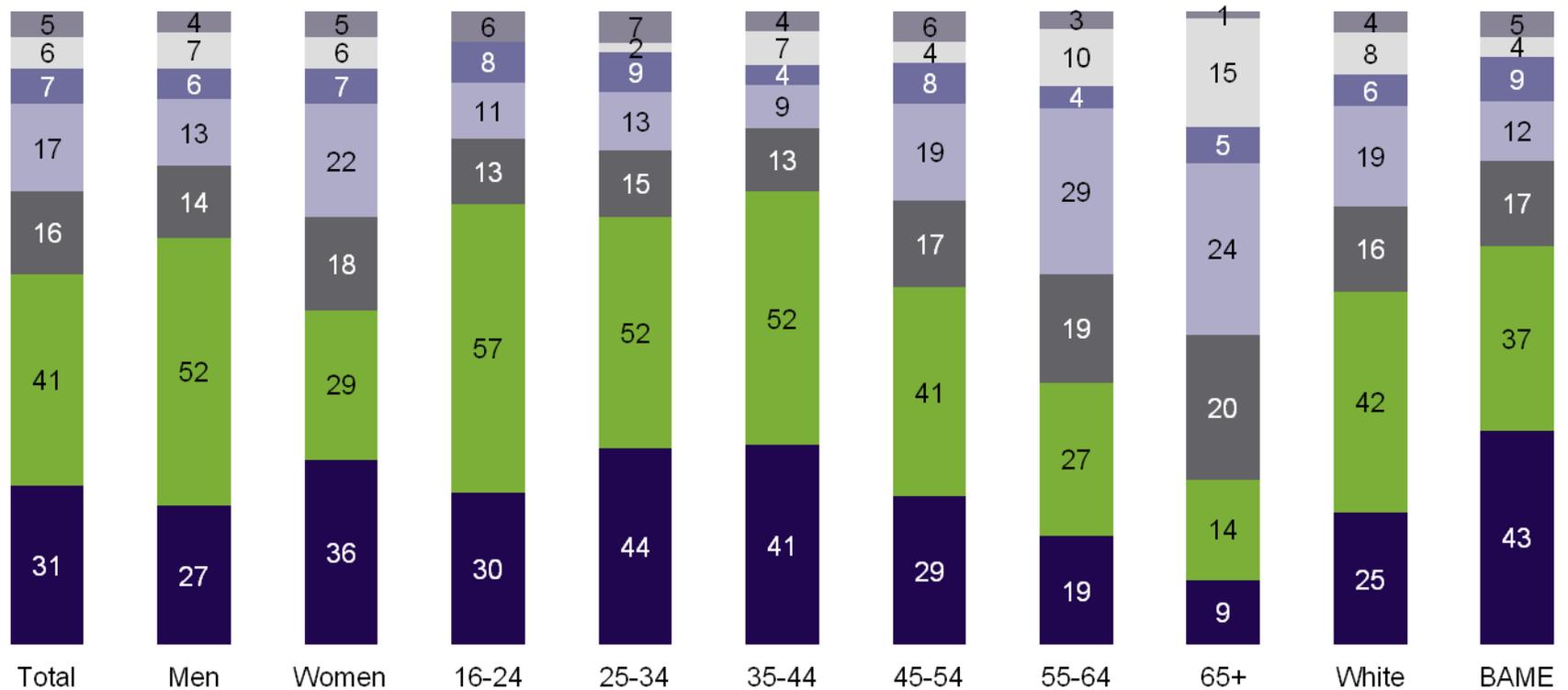


Nearly a third of Londoners would consider taking cycle training in the future, with BAME Londoners and those aged 25-34 most likely

Propensity to take cycle training in the future

%

- Yes
- No - don't need it
- No - not for me
- No - wouldn't consider cycling in London
- No - not convenient
- No - I have a disability which prevents me
- No - already attended cycle training



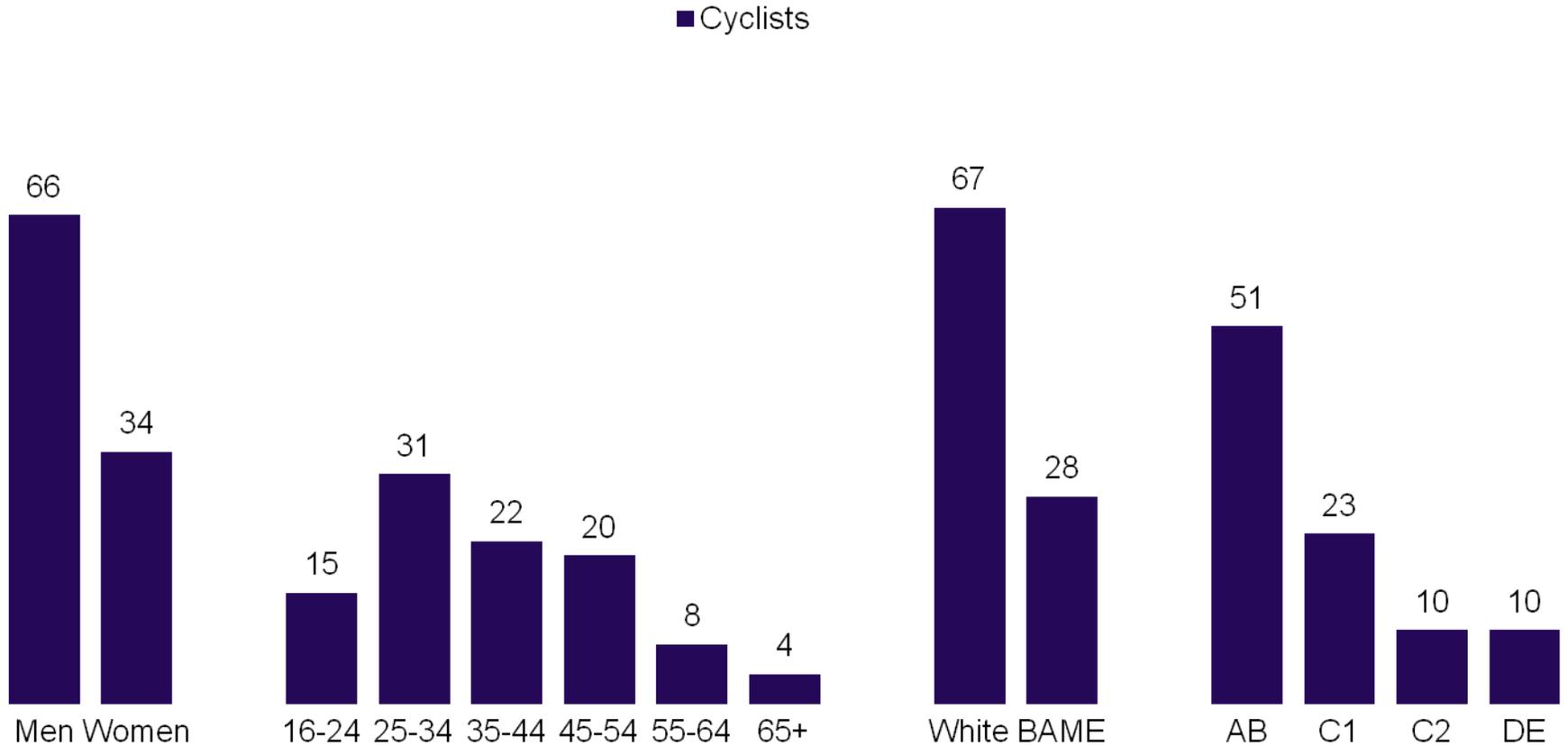
Q4b. Would you consider taking cycle training in the future? Base: all (1,364)

Q4c. Why wouldn't you consider taking cycle training in the future? Base: all not considering taking cycle training in the future (1,001)



Demographic profile of cyclists in London

%



Base: All cyclists (518)

→ Biking boroughs comparison





Biking boroughs

Methodology

- In addition to the interviews with Londoners in general, a further 425 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

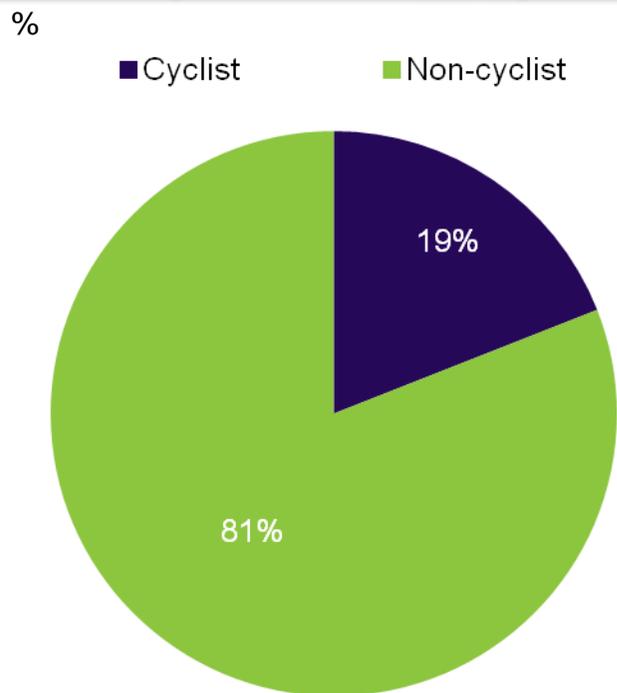
- This boost gave us a total sample of 841 interviews in biking boroughs, equating to approximately 60 interviews per borough
 - At a total sample level this provides reasonable confidence in the findings, however it is not possible to reliably break the sample down to provide findings on a borough by 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 416 interviews from biking boroughs gathered from the main stage of interviewing, with the remainder coming from other London boroughs

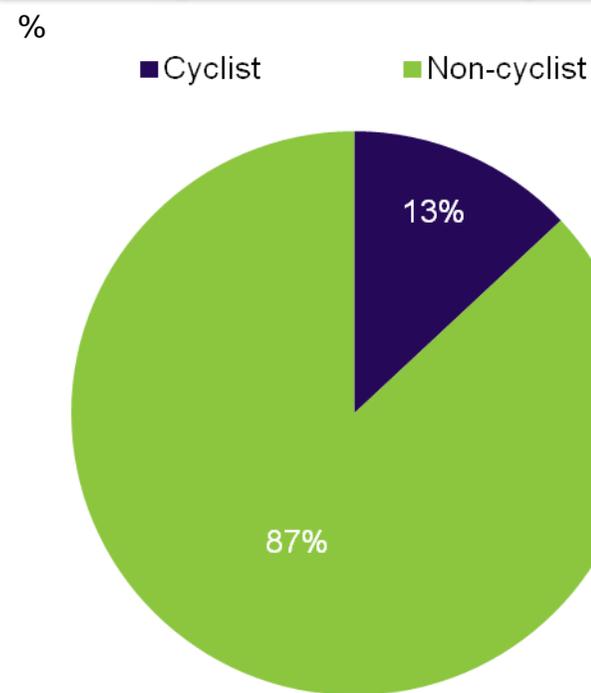


Incidence of cycling

**Total
Cyclists and non-cyclists**



**Biking boroughs
Cyclists and non-cyclists**



**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, 1,364; biking boroughs, 841)

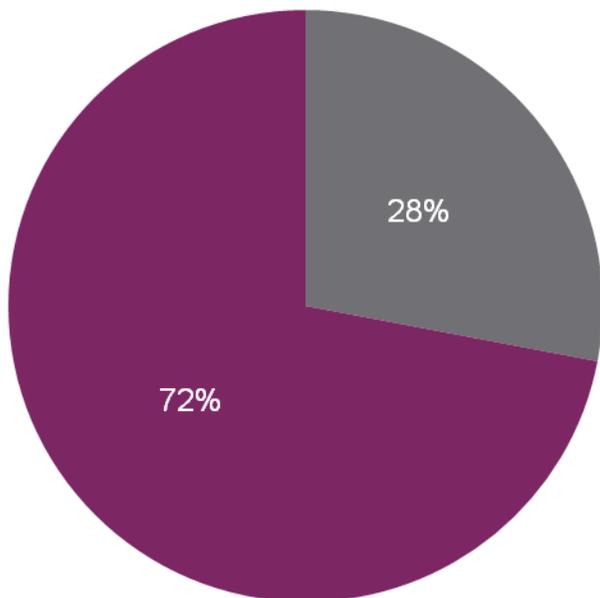


Frequency of cycling

Total
Regular and occasional cyclists

%

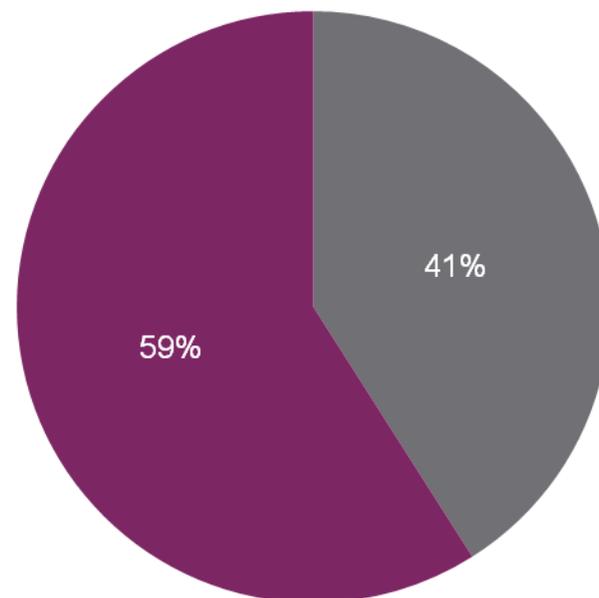
■ Occasional cyclist ■ Regular cyclist



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 cyclists (Total, 518; biking boroughs, 87)



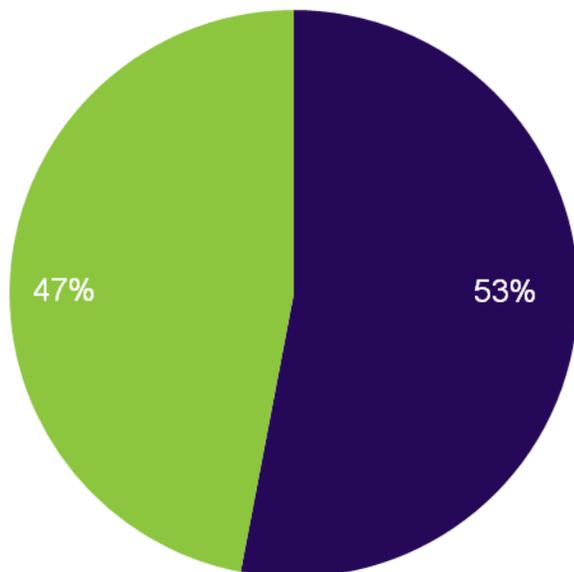
Commuting in London

Commuting in London

All Londoners

%

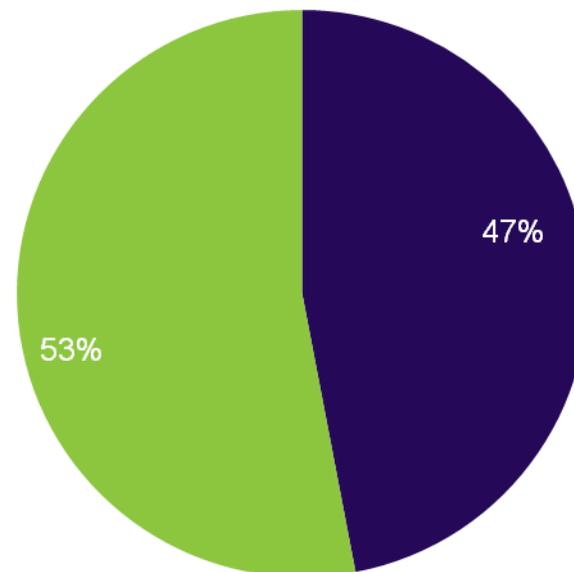
■ Yes ■ No



Biking Boroughs

%

■ Yes ■ No



G1: Do you ever commute in London, by which I mean travelling to work, school, college or university?

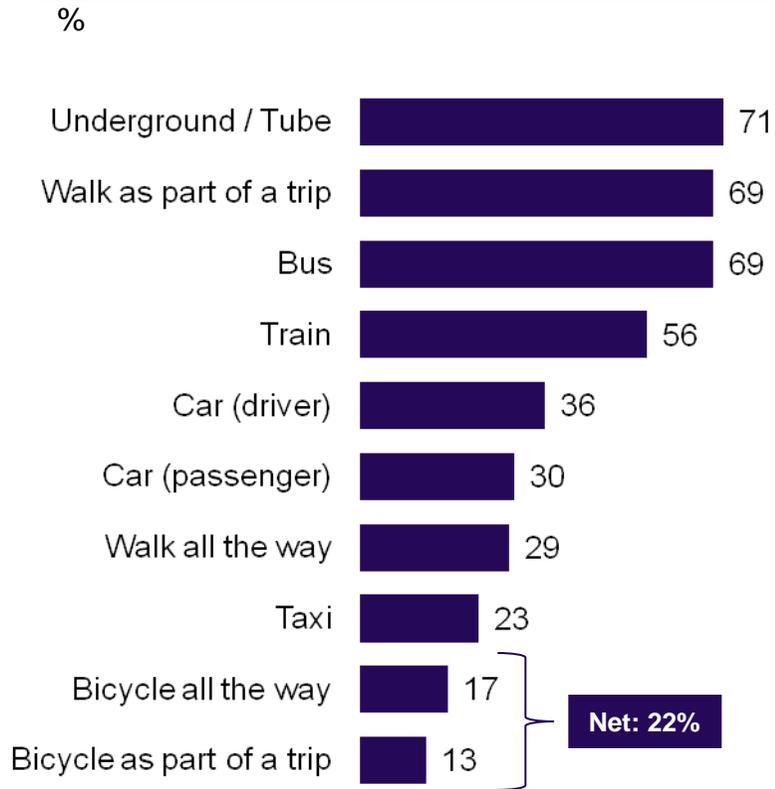
Base: All (Total, 1,060; biking boroughs, 807)



Commuting in London

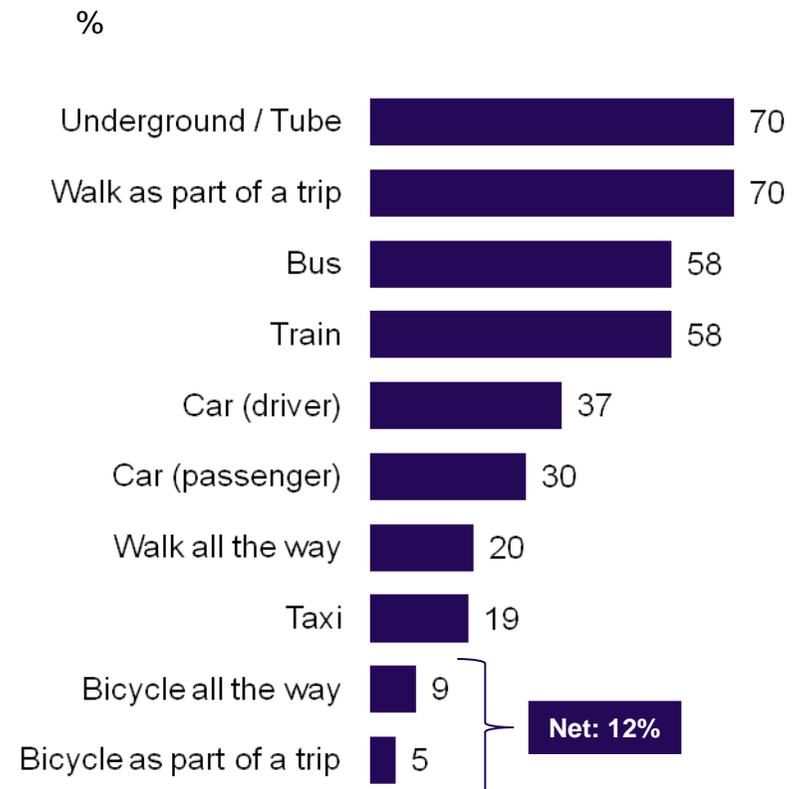
Commuting in London and modes used

Modes of transport for commuting (all Londoners)



Mentions above 13% shown

Modes of transport for commuting (Biking Boroughs)



Mentions above 6% shown

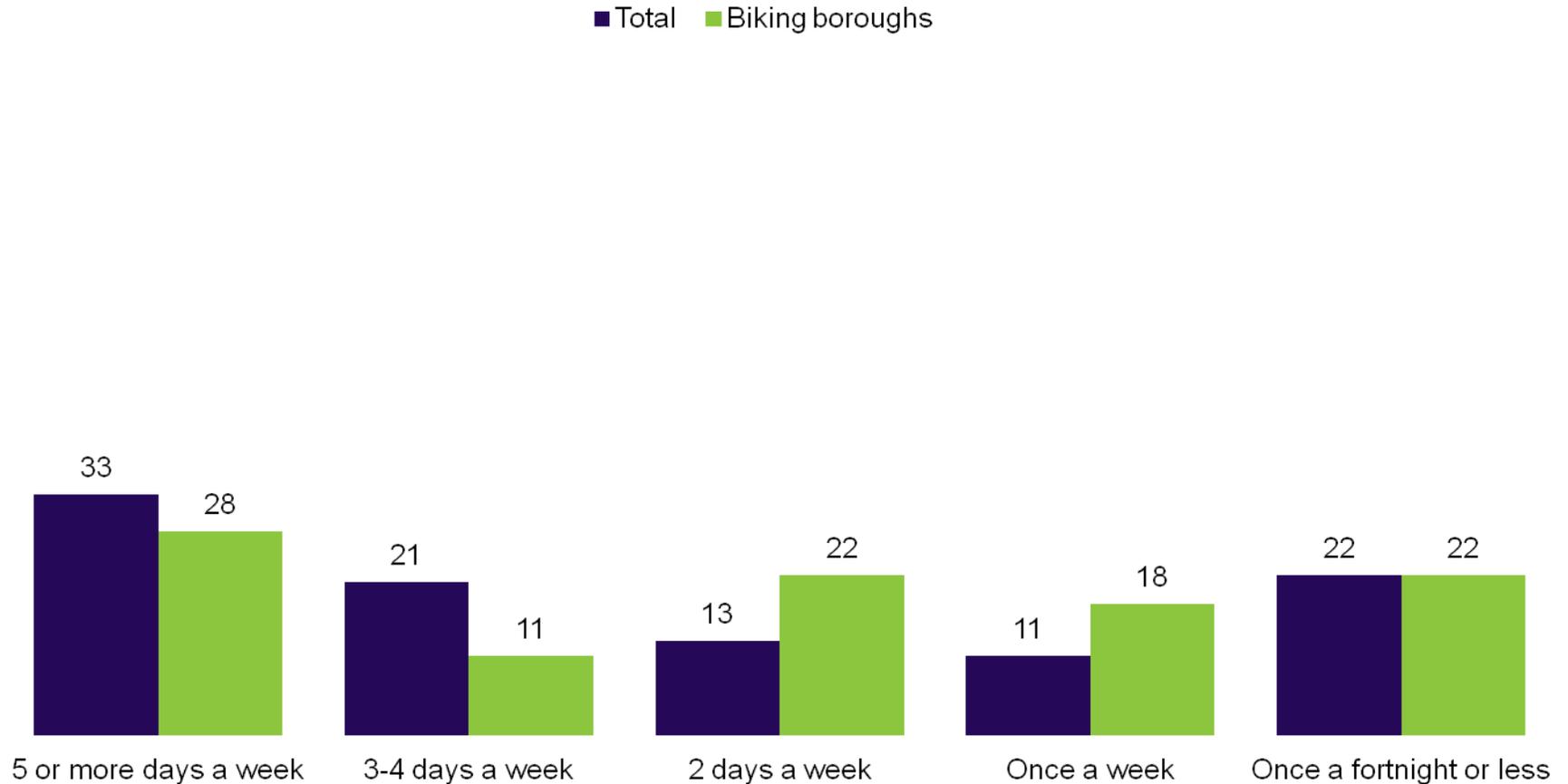
G2: Which types of transport do you use to commute in London?
Base: All who commute (Total, 737; biking boroughs, 334)



Frequency of commuting by bicycle among 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, 250; biking boroughs, 32* caution low base)

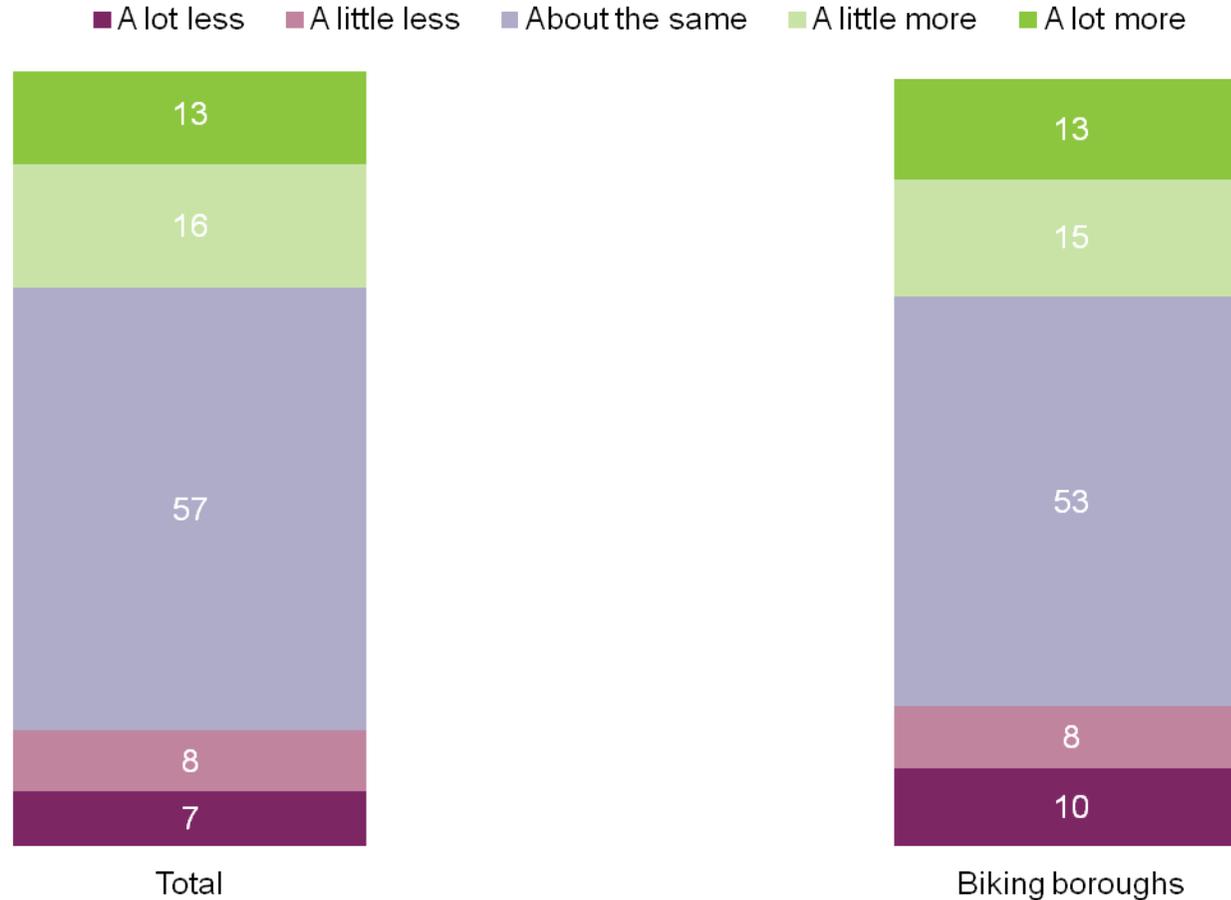
Caution small base for
Biking boroughs



Change in level of cycling over the past year

Frequency of travelling by bike compared with last year

%



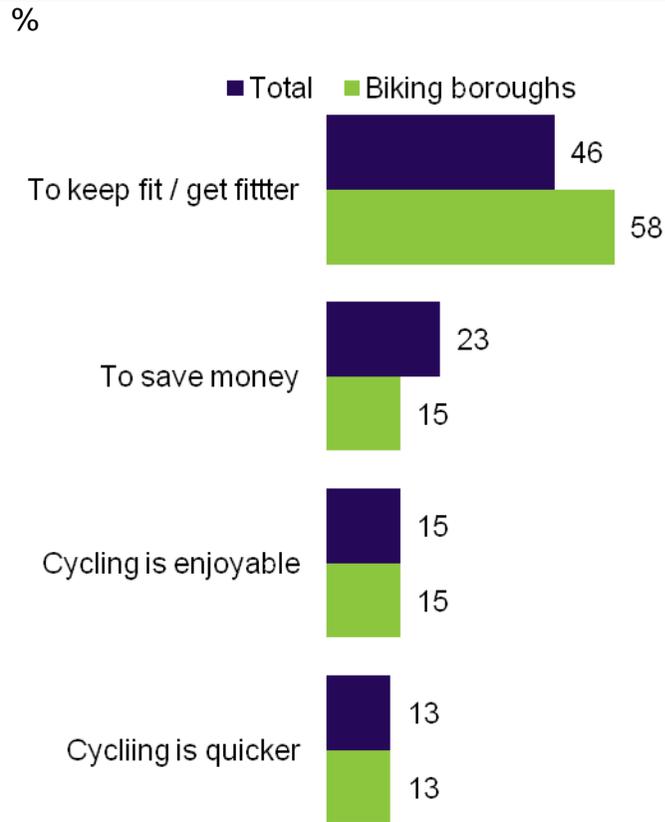
D1. How do you think the amount you cycle in London is compared to this time last year? Would you say you now cycle...?

Base: All cyclists (Total, 518; biking boroughs, 86)



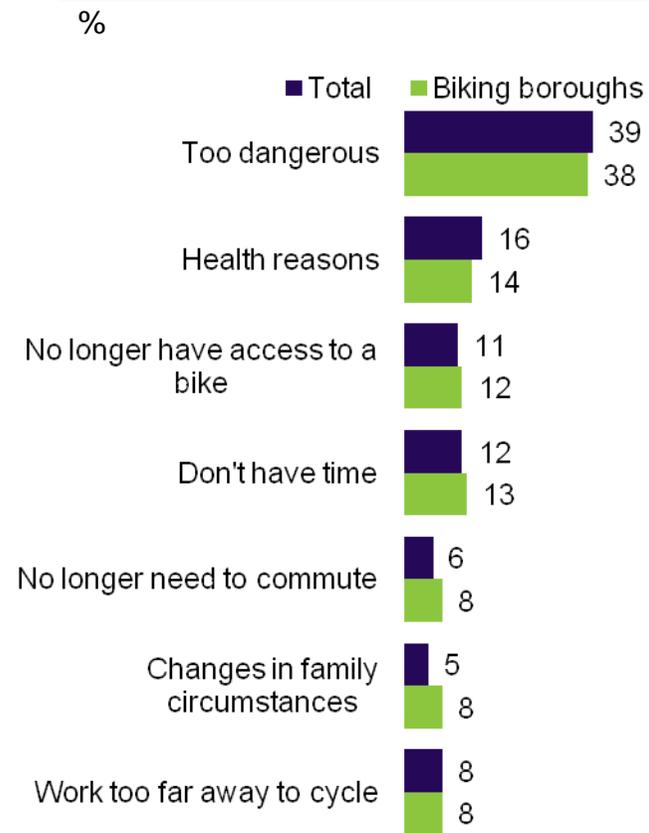
Reasons for change in cycling frequency

Reasons for cycling more



D2. What are the reasons that you have started cycling more this year?
Base: All cycling more (Total, 158; biking boroughs, 46)

Reasons for cycling less



D4. What are the reasons that you are cycling less this year?
Base: All cycling less (Total, 212; biking boroughs, 128)

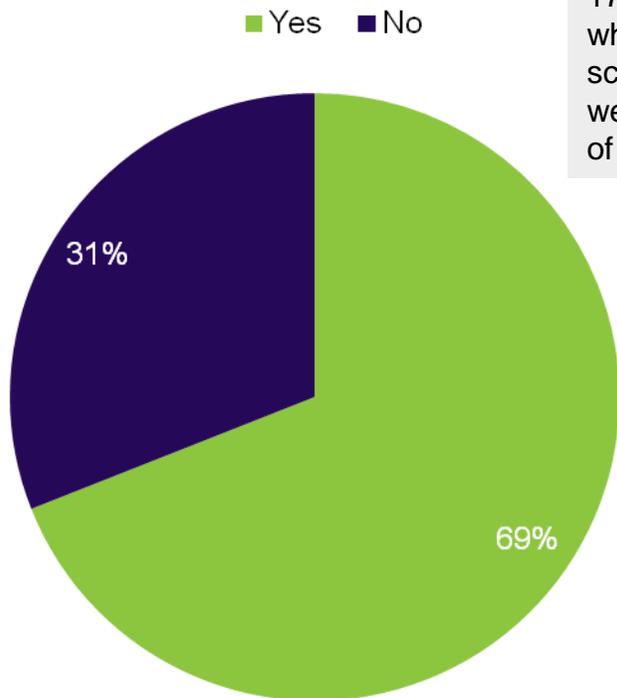


Children's cycling

Whether children in the household have access to a bike / cycle

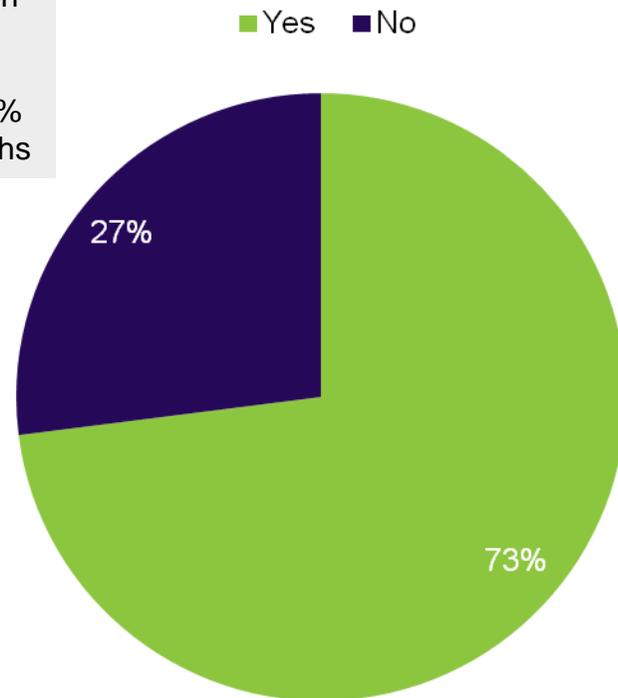
**Whether child owns a bike
(Total)**

%



**Whether child owns a bike
(Biking boroughs)**

%



17% of children in London who own a bike cycle to school at least once a week, compared with 21% of those in biking boroughs

G8: Does your child/children own a bike? Base: all with children

Base: All with children (Total, 364; biking boroughs, 192)

G9: Do any of the children in your household cycle to school regularly (at least once a week)?

Base: All with children who own a bike (Total, 271; biking boroughs, 150)



Behaviour change model – definitions

	Grouping	Cyclists Total sample	Cyclists Biking boroughs
You have never thought about it, but would be unlikely to start in the future	Pre-contemplation	-	-
You have thought about it but don't intend starting in the future	Pre-contemplation	-	-
You have never thought about it but could be open to it in the future	Pre-contemplation	3%	7%
You are thinking about starting soon	Contemplation	5%	8%
You have decided to start soon	Preparation	1%	1%
You have tried to start recently, but are finding it difficult	Change	2%	5%
You have started recently and are finding it quite easy so far	Change	2%	-
You started a while ago and are still doing it occasionally	Sustained change	33%	41%
You started a while ago and are still doing it regularly	Sustained change	48%	32%
You had started doing this but couldn't stick to it	Lapsed	5%	5%
Don't know	Don't know	-	1%

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

Base: All cyclists in the last 12 months (Total, 518; biking boroughs, 86)



Behaviour change model – definitions

	Grouping	Non-cyclists Total sample	Non-cyclists Biking boroughs
You have never thought about it, but would be unlikely to start in the future	Pre-contemplation	39%	41%
You have thought about it but don't intend starting in the future	Pre-contemplation	32%	34%
You have never thought about it but could be open to it in the future	Pre-contemplation	14%	12%
You are thinking about starting soon	Contemplation	8%	7%
You have decided to start soon	Preparation	-	1%
You have tried to start recently, but are finding it difficult	Change	-	-
You have started recently and are finding it quite easy so far	Change	-	-
You started a while ago and are still doing it occasionally	Sustained change	-	-
You started a while ago and are still doing it regularly	Sustained change	-	-
You had started doing this but couldn't stick to it	Lapsed	6%	5%

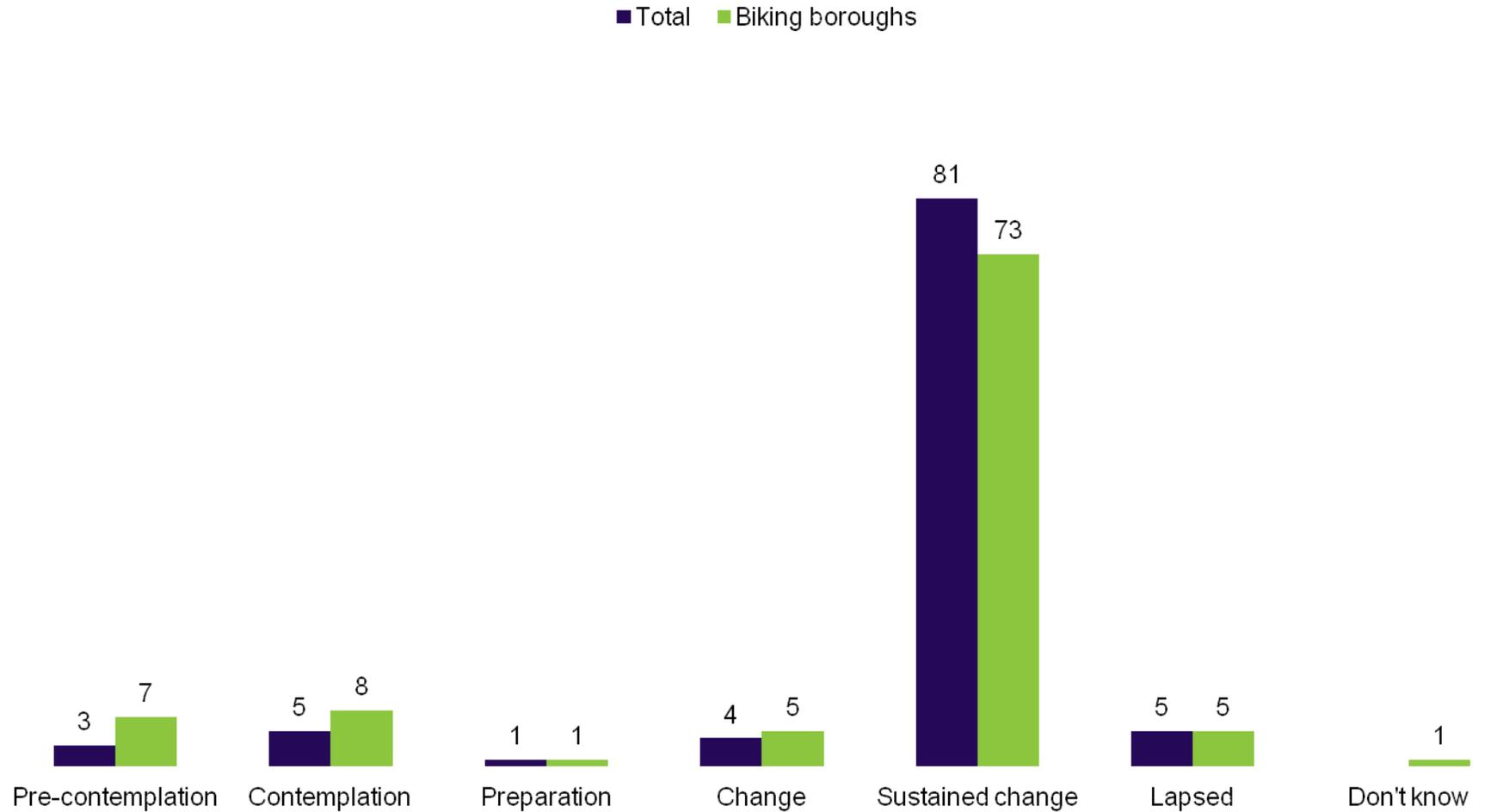
B2: Thinking about the possibility of "taking up cycling", which of these descriptions would you say most applies to you?

Base: All not cycled in the last 12 months (Total, 846; biking boroughs, 734)



Behaviour change model – cyclists

Behaviour change model



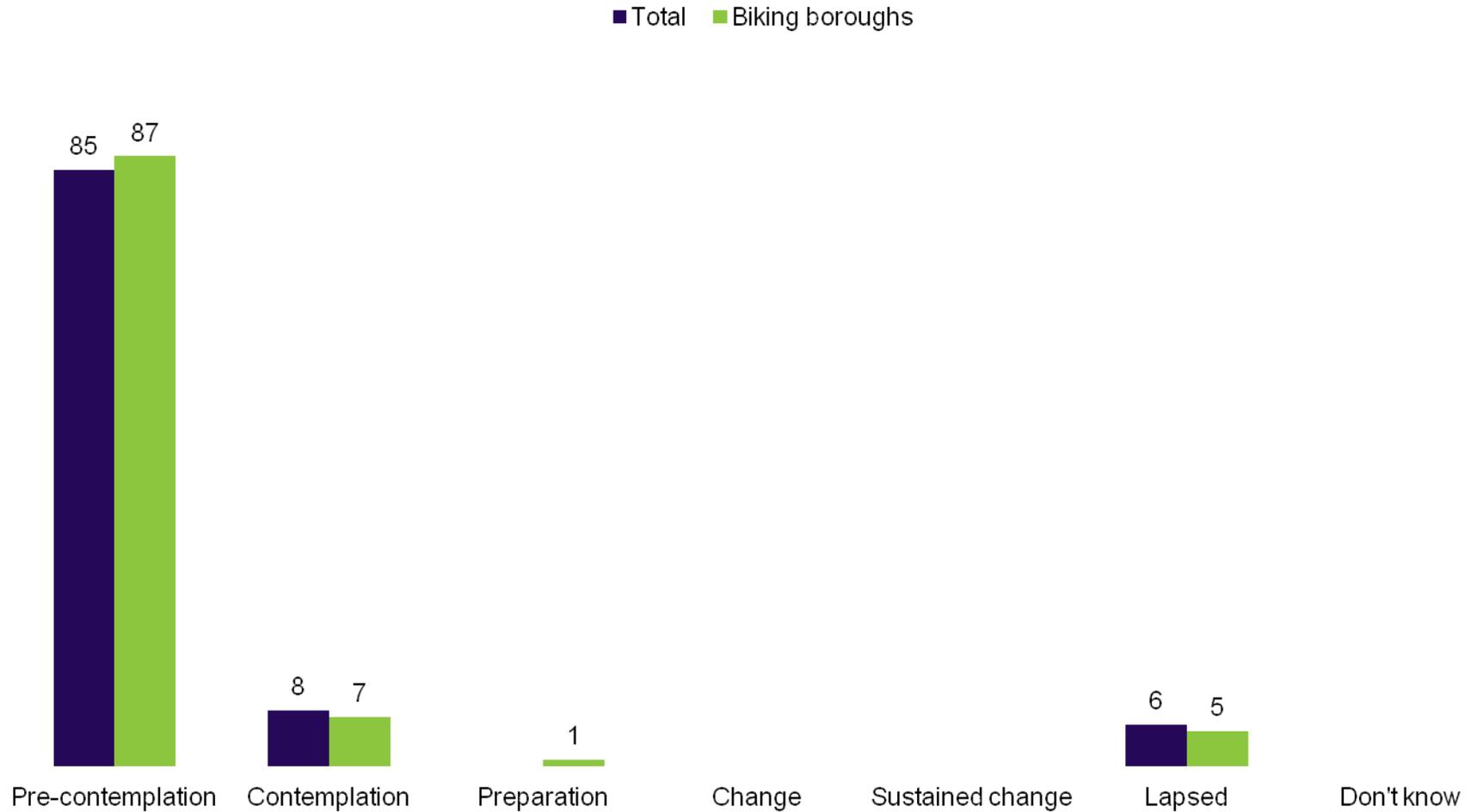
B1: Thinking about the possibility of "taking up cycling", which of these descriptions would you say most applies to you?

Base: All not cycled in the last 12 months (Total, 857; biking boroughs, 729)



Behaviour change model – non-cyclists

Behaviour change model



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

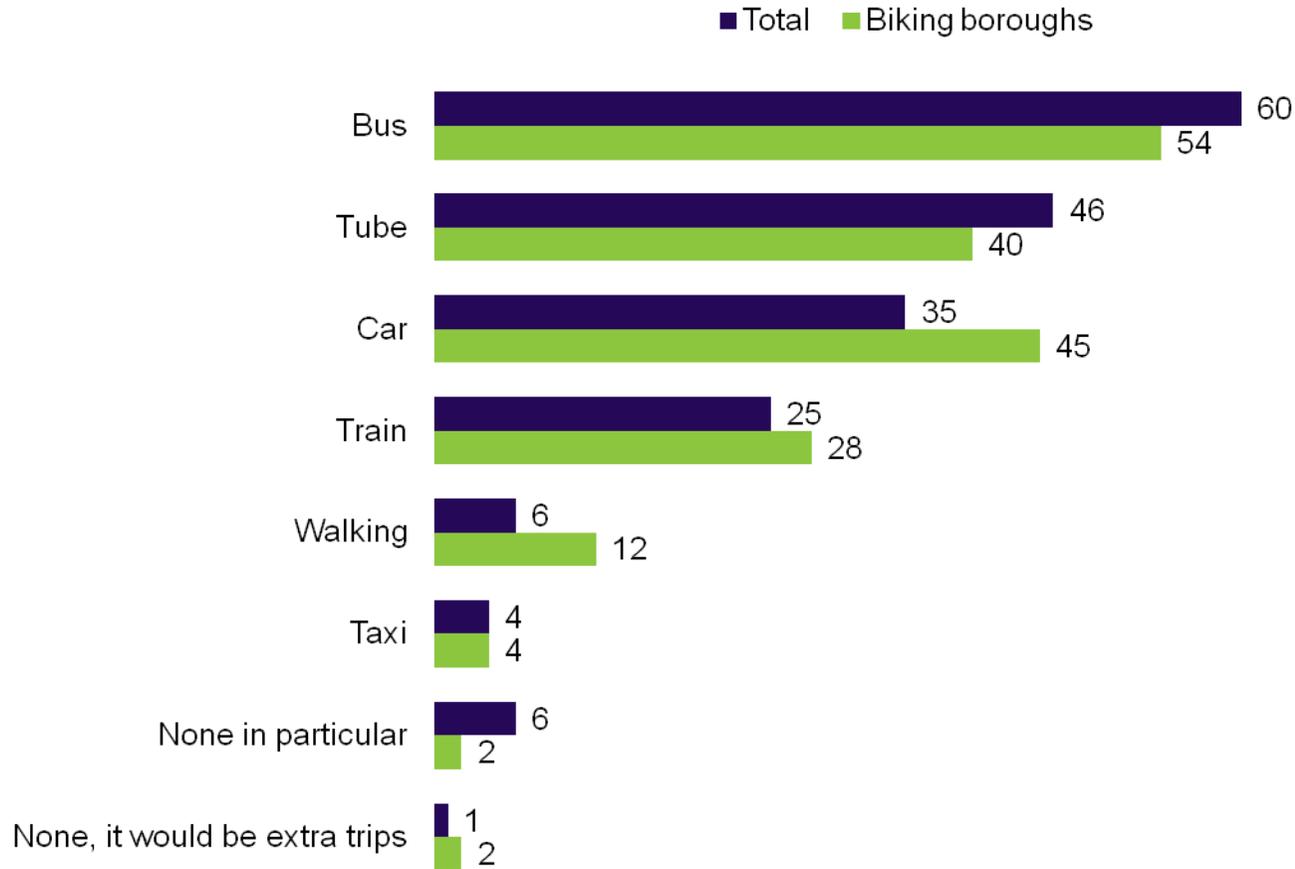
Base: All not cycled in the last 12 months (Total, 857; biking boroughs, 729)



Potential modal shift

Modes that would be used less as a result of increased cycling

%



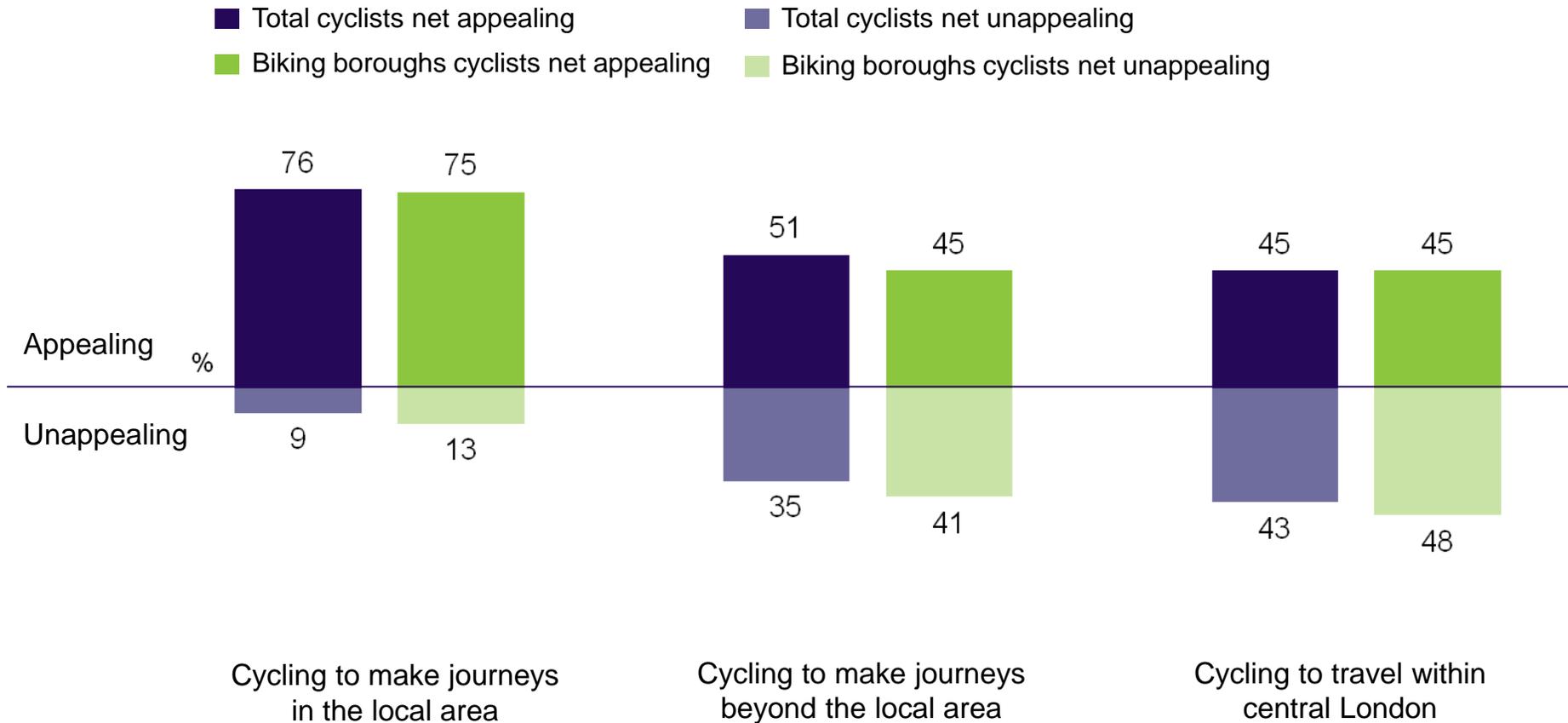
E5: What type of transport, if any, would you use less if you cycled more?

Base: all cyclists in the last 12 months planning to cycle more (Total, 489; biking boroughs, 78)

Caution small base for
Biking boroughs

→ 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: All cyclists except those who find cycling very unappealing (Total, 485; biking boroughs, 80)



Agreement with statements about cycling in London

	Total (%)	Biking boroughs (%)
Cyclists are vulnerable to other road users	94	95
Traffic makes people afraid of cycling on London streets	92	92
Cycling is becoming more popular	90	88
Cycling is enjoyable	86	86
Cycling is a convenient way of getting around	84	83
Cycling is a good social activity	82	82
Cycling makes a positive contribution to the quality of life in London	81	82
Cycling is the fastest way to travel for short journeys	80	77
Cycling gets you to your destination when you expect to arrive	76	77
I see lots of people cycling in and around my local area	66	59
Cycling is a method of transport that you would want to be seen using	61	62
I can accurately estimate my journey time when travelling by bike	60	60
My local area is good for cycling	59	62
Information and signs make it easy to find your way when cycling	55	57
There are good facilities for cyclists in London	50	54
Cycling is a method of transport that I would use and/or recommend	49	49
Cycling is not for people like me	40	42
London is a city for cycling	38	35
Cycling is a safe way of getting about	25	23
I feel confident cycling on London's roads	21	17

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 (Total, 1,364; biking boroughs, 841)



Satisfaction with cycle parking facilities

Satisfaction with cycle parking facilities at different locations

	Satisfied (%)		Dissatisfied (%)	
	Total	Biking boroughs	Total	Biking boroughs
At your workplace* <small>*excludes 'not applicable'</small>	64	67	22	21
At London train / Tube stations	41	39	27	24
On London's streets	35	43	33	32
Near your home	37	33	41	42

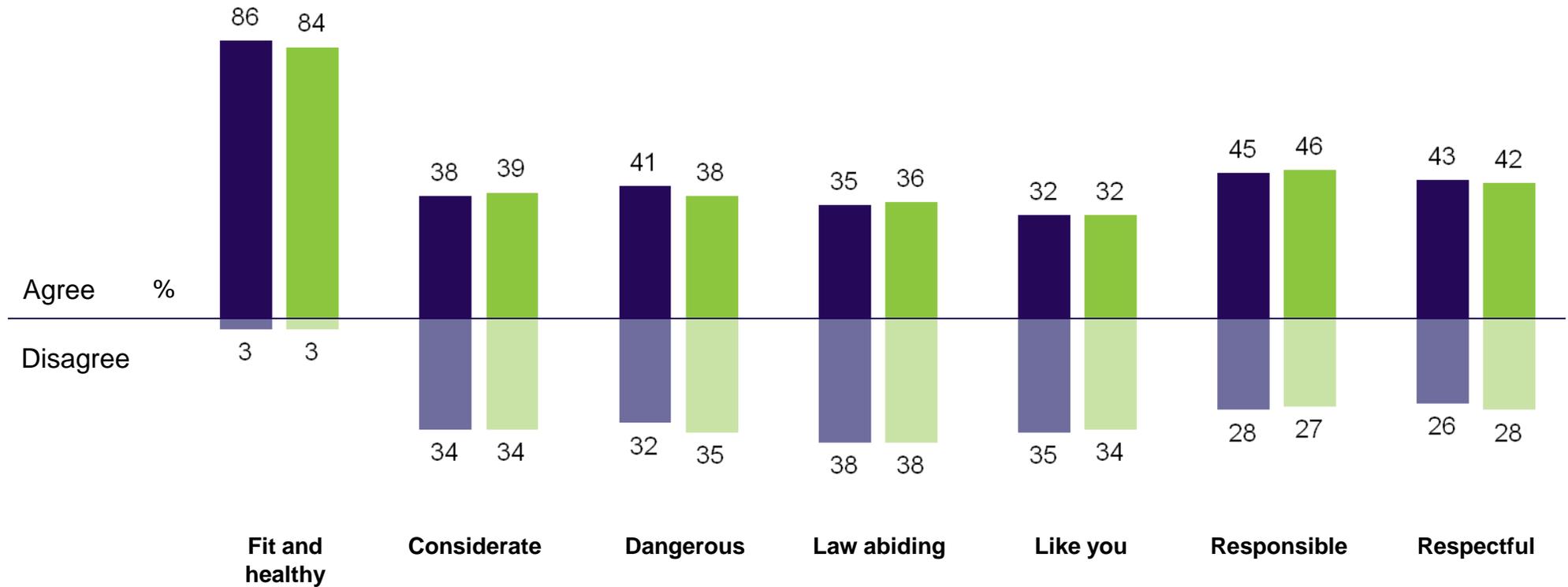
A3: How would you rate your level of satisfaction with the parking facilities for bicycles in London?

Base: All cyclists (Total, 518; biking boroughs, 86)



Opinions of cyclists

■ Total net agree ■ Total net disagree ■ Biking boroughs net agree ■ Biking boroughs net disagree



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

Base: All (Total: 1,364, biking boroughs: 841)



Perceptions of cycling infrastructure

Ranking of potential deterrents

	Good (%)		Poor (%)	
	Total	Biking boroughs	Total	Biking boroughs
Availability of information on cycle routes	53	55	23	26
Availability of cycle lanes	27	30	47	47
Safety of cycling	22	33	48	48
Security of bike when it is left	24	37	48	25
Availability of advance stop lines	53	51	22	25

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

Base: all cyclists (Total: 518, biking boroughs: 115)



Awareness of Barclays Cycle Hire

Awareness of Barclays Cycle Hire

%

Percentage aware of BCH



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

Base: All (total, 1,364; biking boroughs, 841)



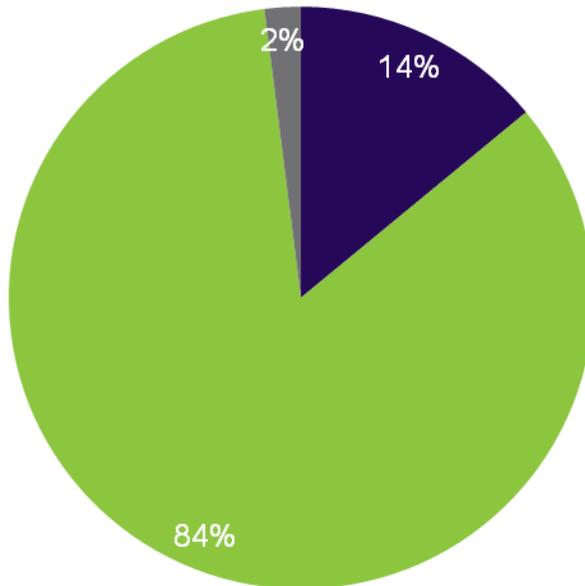
Intended use of BCH

Intended use

**Intention to use
Total**

%

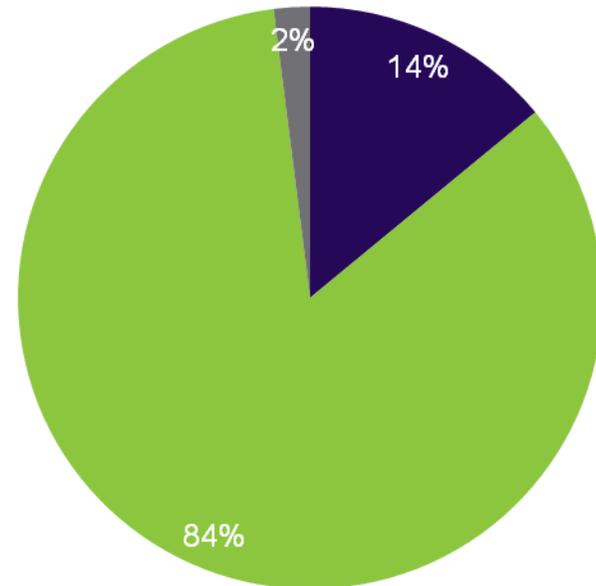
■ Yes ■ No ■ Don't know



**Intention to use
Biking boroughs**

%

■ Yes ■ No ■ Don't know



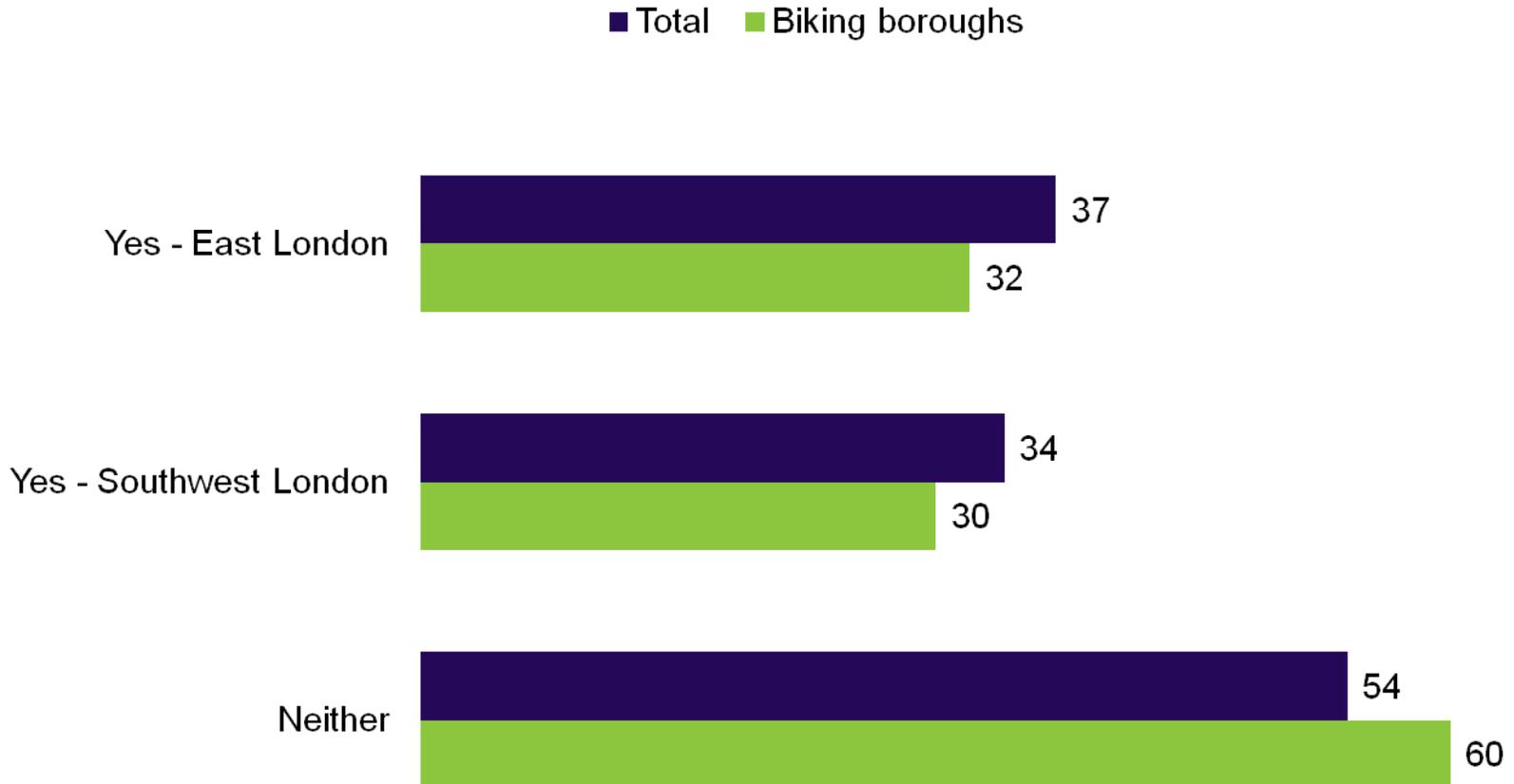
N3: Do you intend to use Barclays Cycle Hire in the future?
Base: All Barclays Cycle Hire Non-Users (Total, 1207; biking boroughs, 803)



Awareness of Eastern and Southern expansion areas

Eastern and Southern expansion areas

%



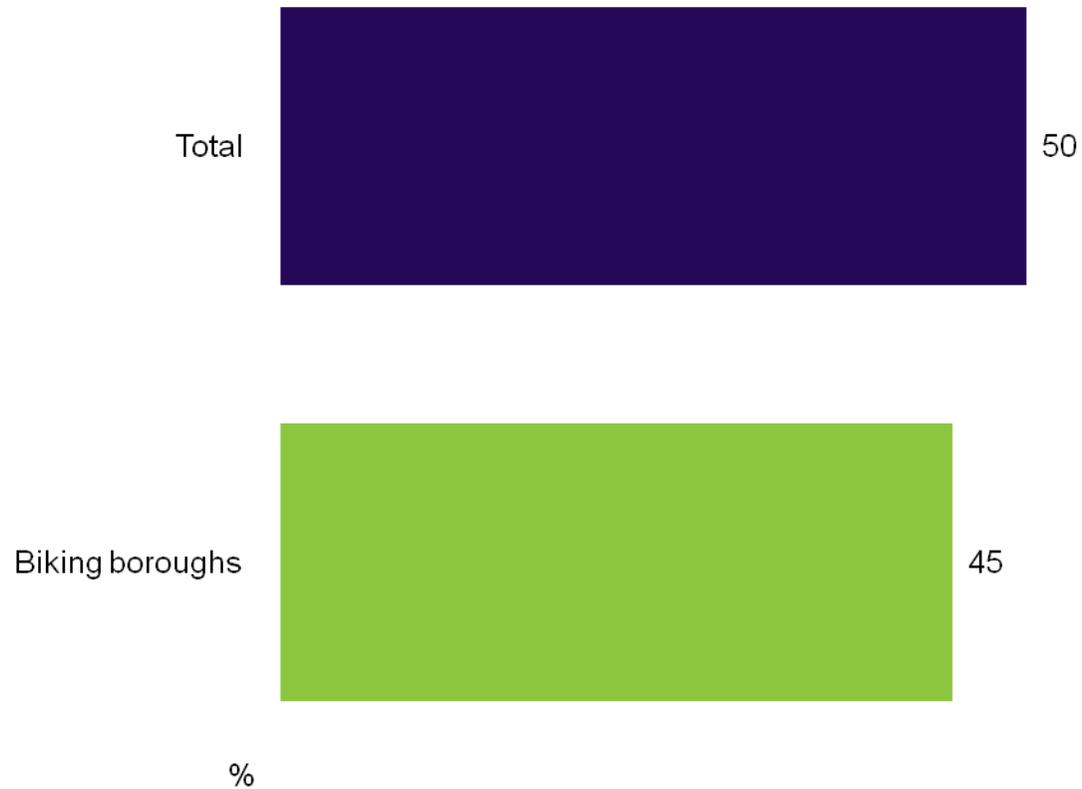
N7: Were you aware that the area covered by Barclays Cycle Hire is expanding from Central London to include more of East London and South London?

Base: Those aware of Barclays Cycle Hire (Total, 1,364; biking boroughs, 841)



Awareness of Barclays Cycle Superhighways

Awareness of Barclays Cycle Superhighways



M1: Are you aware of Barclays Cycle Superhighways?

Base: All (Total 1,364; biking boroughs, 841)



Awareness of extent of BCSH network

Awareness that a London-wide network of cycle routes is being built

%

■ Aware ■ Not aware



M8. Were you aware that a London-wide network of cycle routes will be built over the coming years?

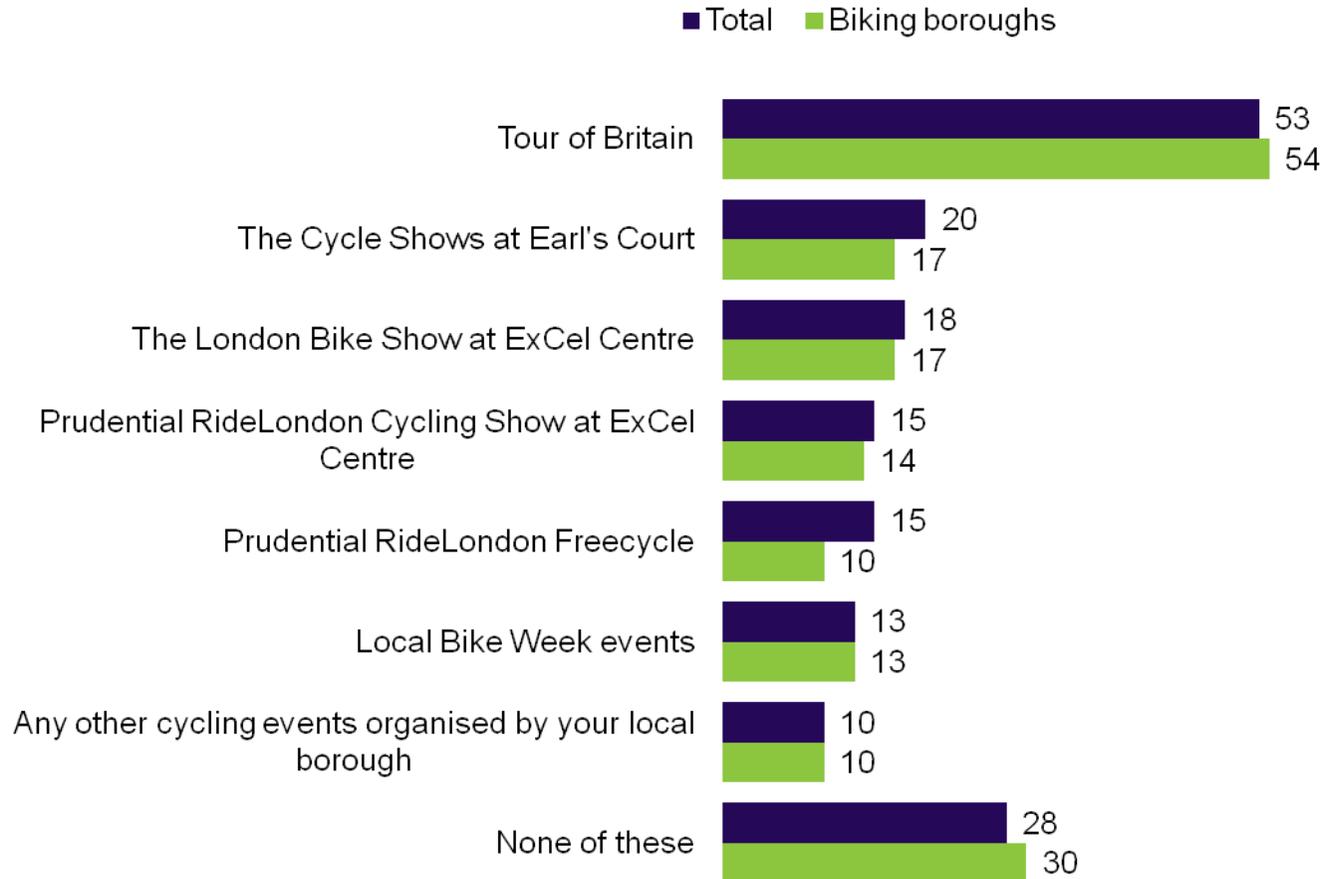
Base: Those aware of Barclays Cycle Superhighways (Total, 739; biking boroughs, 379)



Awareness of non-Olympic cycling events

Awareness of non-Olympic cycling events

%



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

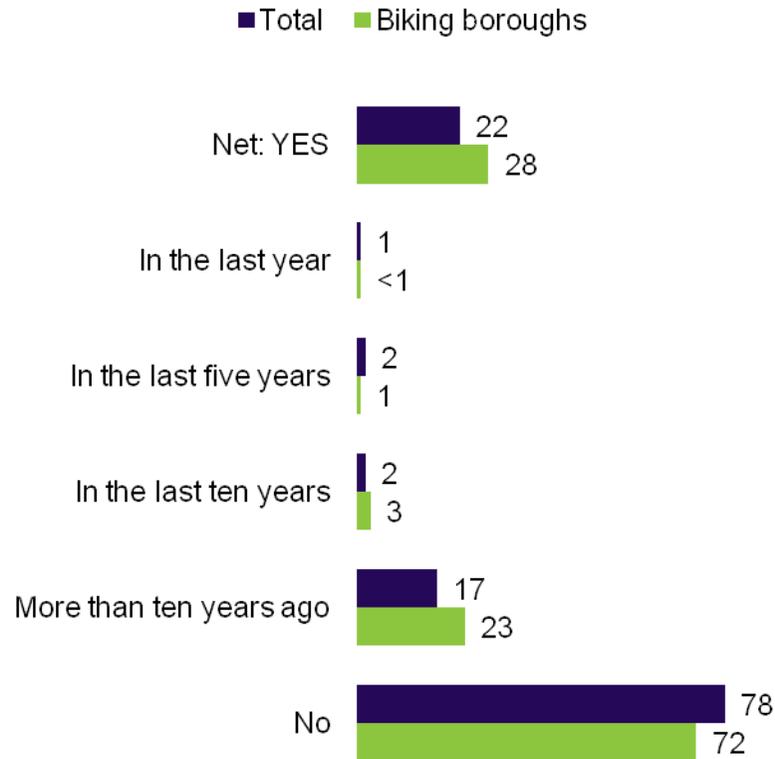
Base: All (Total, 1,364; biking boroughs, 841)

→ Experience of cycle training

Experience of cycle training

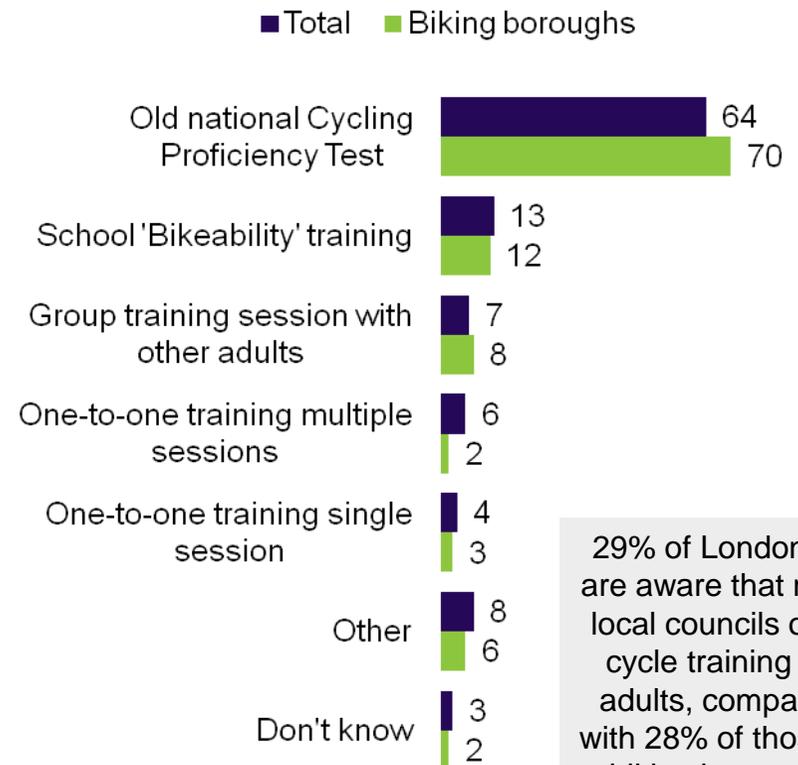
Cycle training attendance

%



Type of cycle training attended

%



29% of Londoners are aware that most local councils offer cycle training for adults, compared with 28% of those in biking boroughs

Q1: Have you ever attended any cycle training? Base: all (total, 1,364; biking boroughs, 841)

Q3: What sort of cycle training did you have? Base: All those who have attended cycle training (Total, 361; biking boroughs, 206)



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?

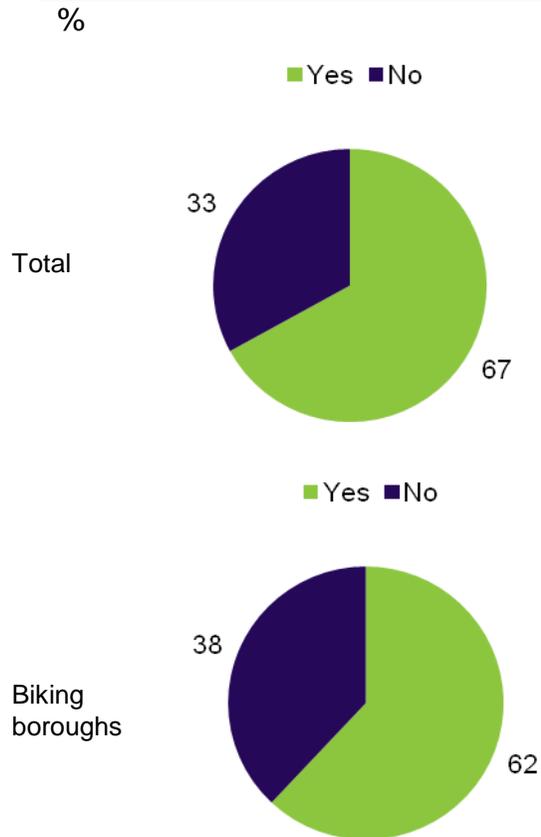
Base: all (Total, 1,364; biking boroughs, 841)



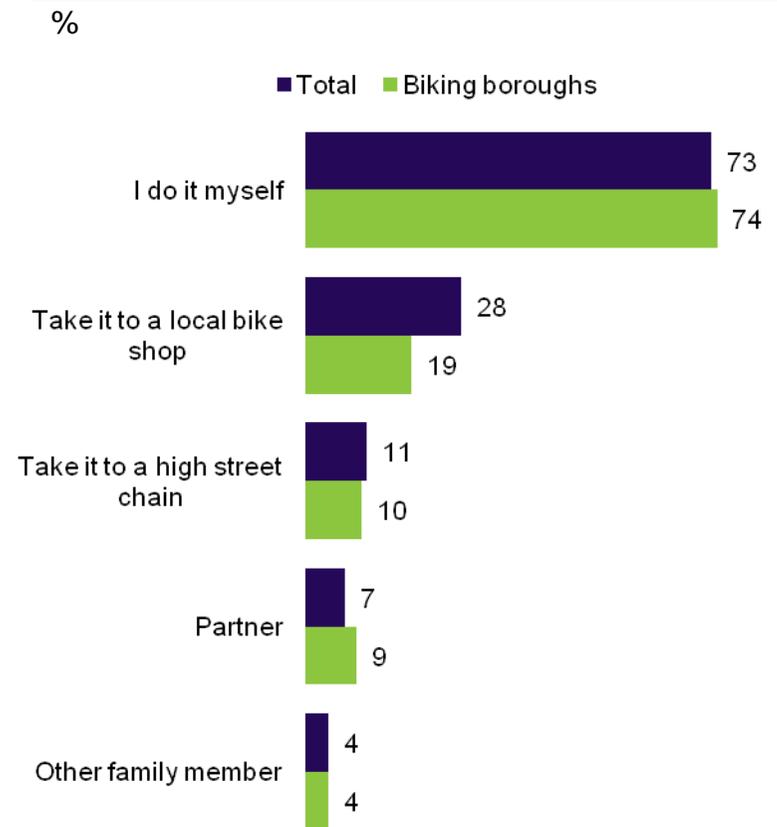
Bike maintenance

Bike maintenance

Do you maintain your bicycle?



How do you maintain the bicycle?



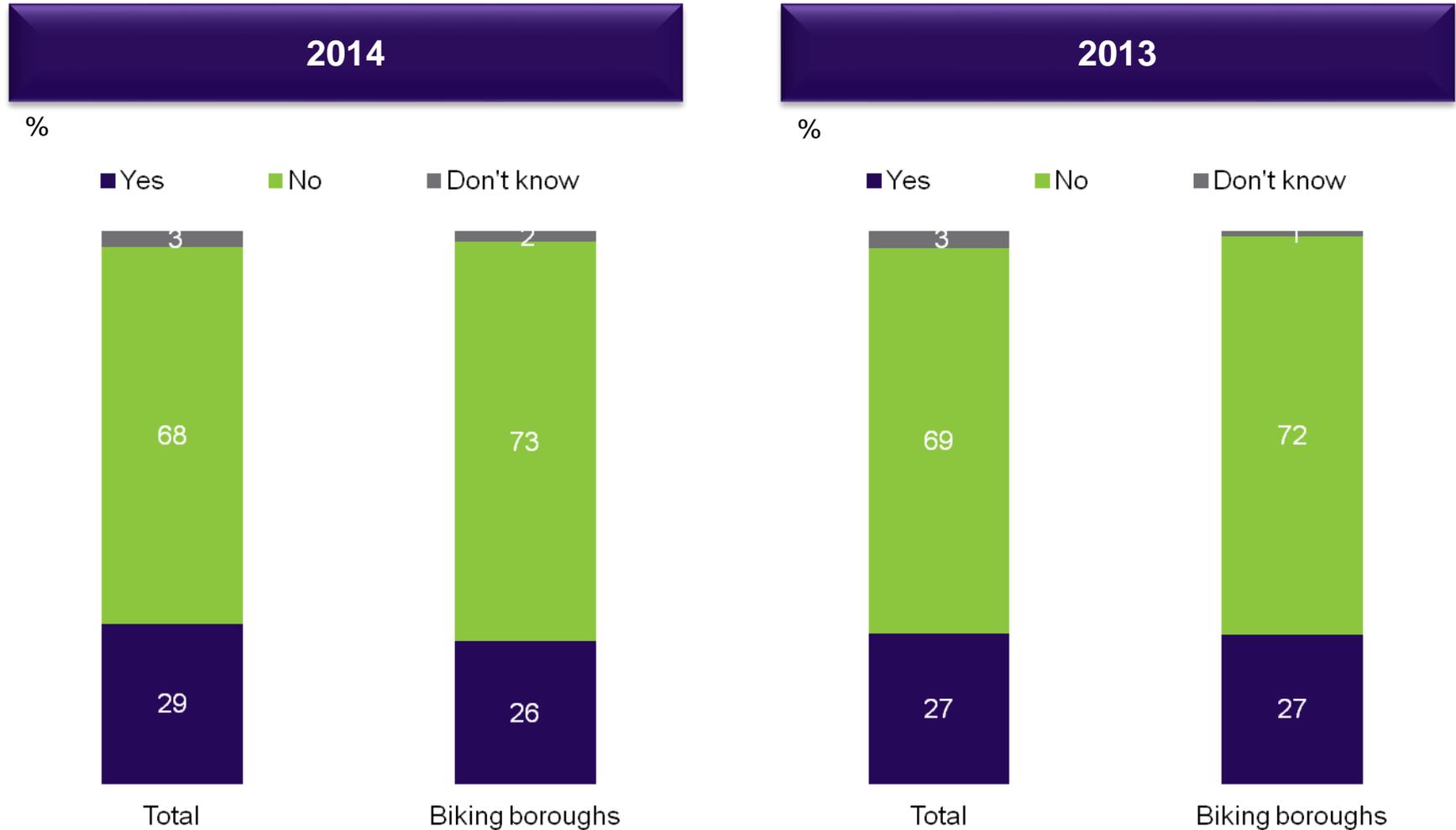
QMAINT1/MAINT2. Do you maintain the bicycle that you have access to? / How do you maintain the bicycle you have access to?

Base: all cycling at least monthly, or less but with household access to a bike (Total, 818; biking boroughs, 386) / all maintaining a bike (Total, 624; biking boroughs, 235)



Cycle marking

Cycle marking / registration with police



QMARK. Is the bicycle you have access to marked / registered with the police?
Base: all cyclists who cycle at least once a month (Total, 513; biking boroughs, 83)



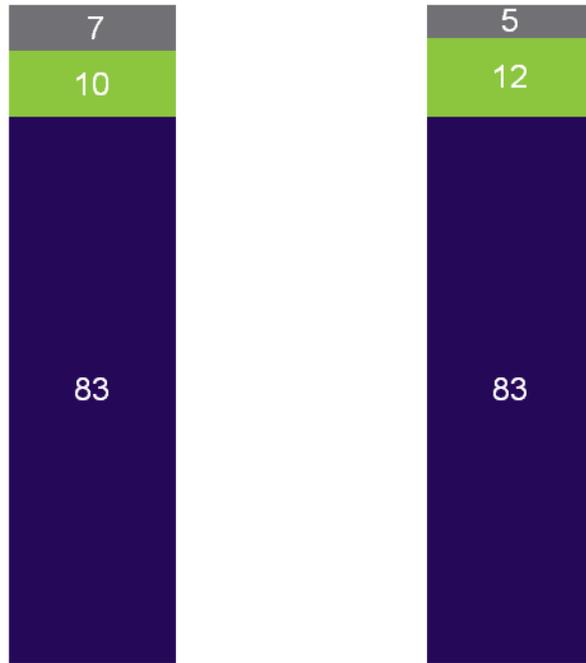
Cycle security

Locking bicycle when out and about



%

■ Always ■ Sometimes ■ Never



Total

Biking boroughs



%

■ Always ■ Sometimes ■ Never



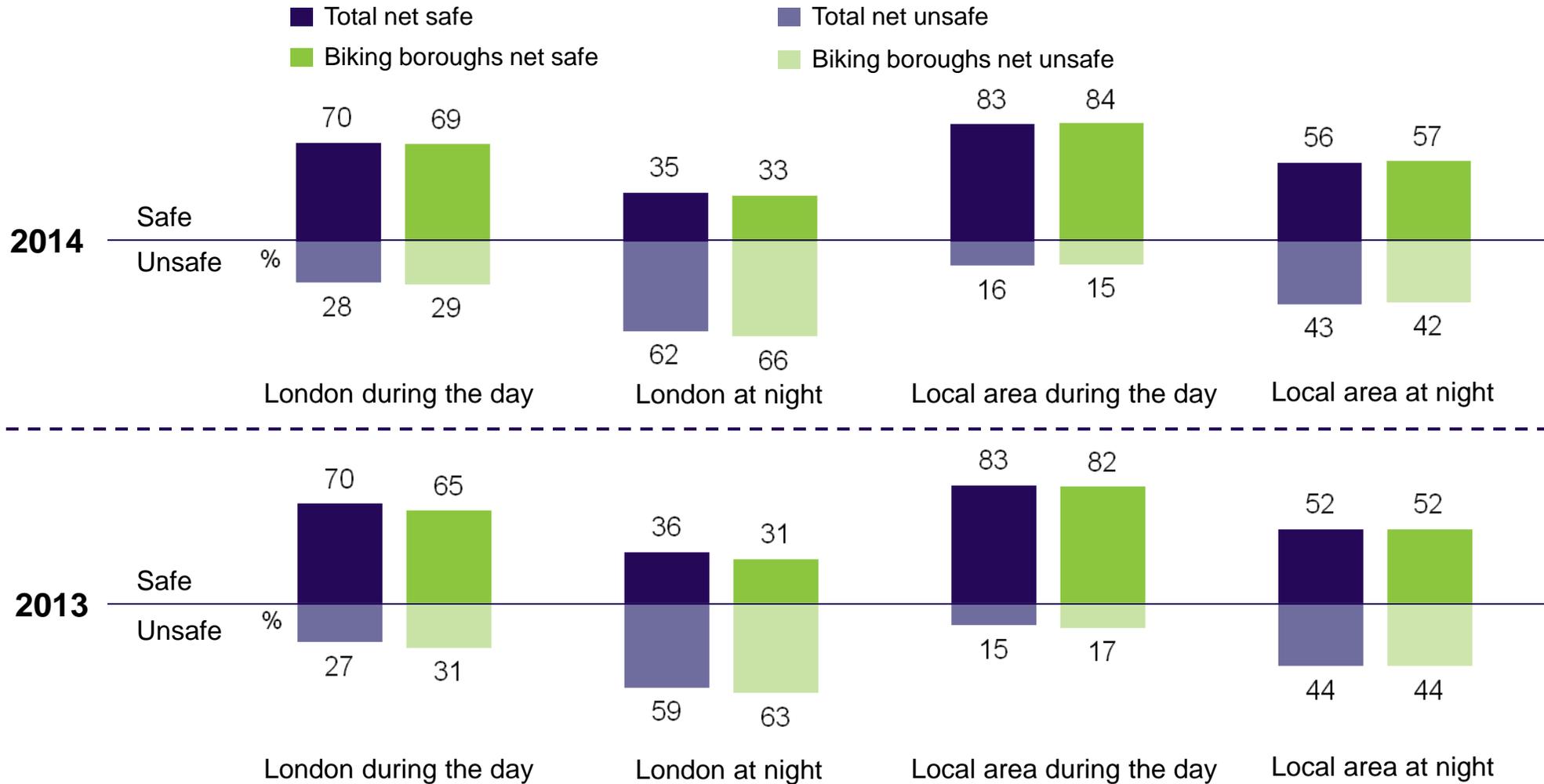
Total

Biking boroughs

QLOCK1. When you're out and about on the bicycle you have access to how often do you secure it by locking it up?
Base: All cyclists who cycle at least once a month (Total, 513; biking boroughs, 83)

→ Perceptions of cycling safety

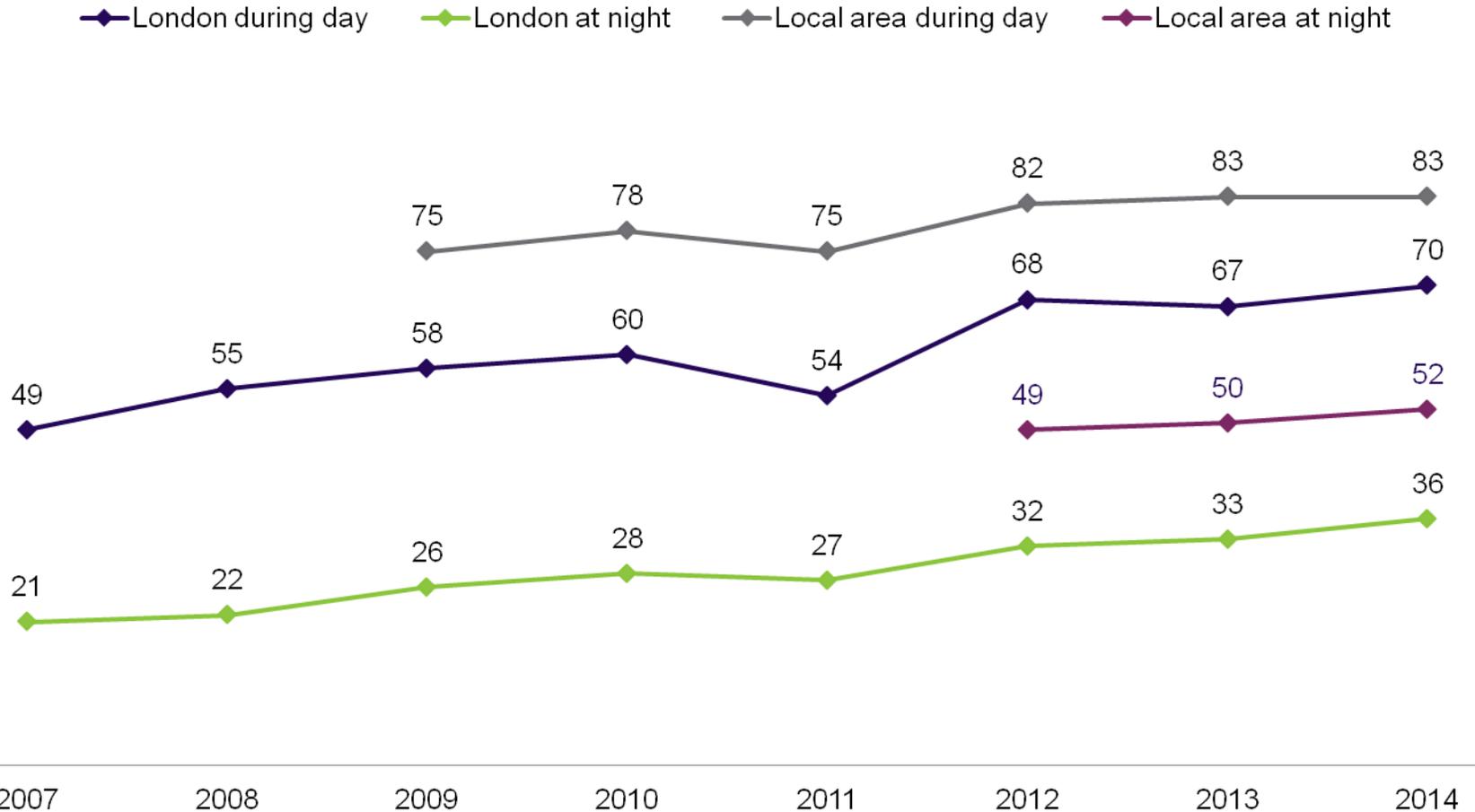
Safety of cycling in London and local area



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 (Total, 1,364; biking boroughs, 841)

→ Perceptions of cycle safety

% very safe / quite safe



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 (Total 2014 1,364 Base: All – 2013 (1,066), 2012 (1,000), 2011 (1,000), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208))



Cycle theft

Reported incidence of cycle theft



%

■ No ■ Yes, part of bike ■ Yes, whole bike



%

■ No ■ Yes, part of bike ■ Yes, whole bike



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

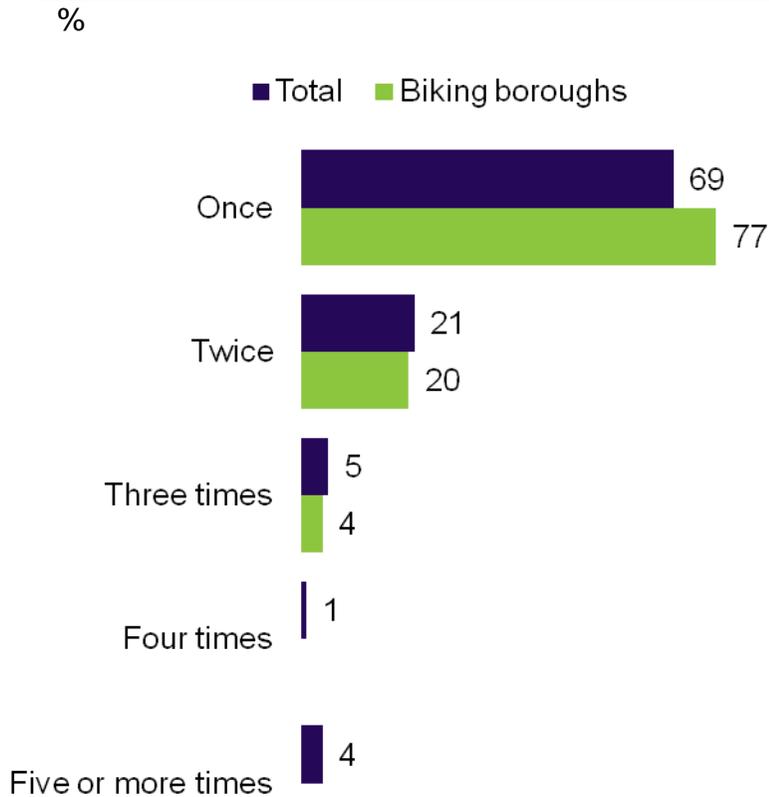
Base 2014: All (Total, 1,364; biking boroughs, 841) Base 2013: All (Total, 1,373; biking boroughs, 840)



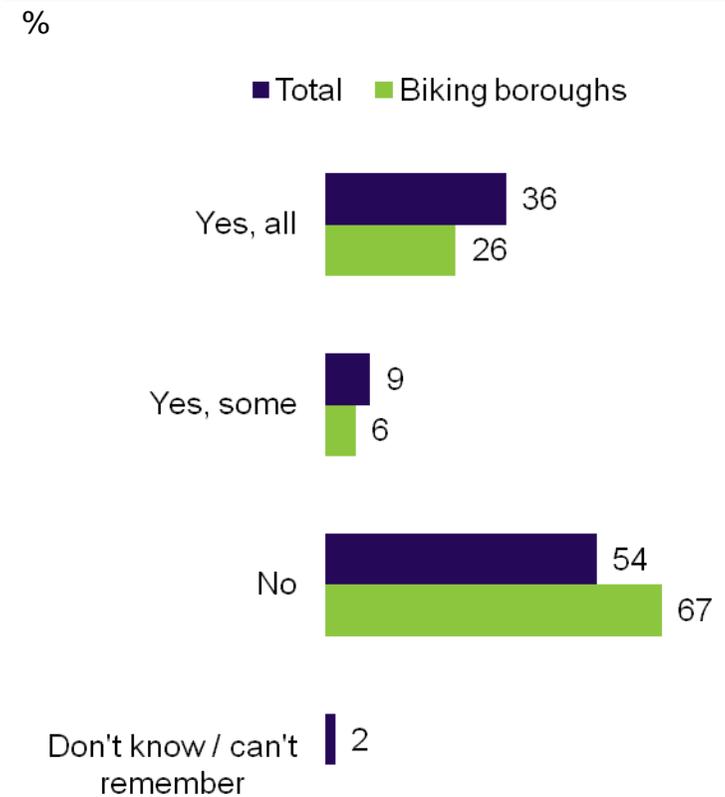
Reporting cycle theft

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



L6: How many times has this happened to you (in the last couple of years)? Base: All respondents who have had a bike or part of a bike stolen in the last couple of years (total 179; biking boroughs 51)

L7: Did you report any of these incidents/the incident to the police?

Base: all who have had (part of) bike stolen (total 179; biking boroughs 51)



Reporting cycle theft

Reasons for not reporting cycle theft to police

	Total (%)	Biking boroughs (%)
No point/would not get the item back	49	46
Police would not investigate the matter	31	22
Bike was not worth much	14	13
Hassle / could not be bothered	9	15
Bike was returned / found	6	9
It was my fault / I did not lock the bike	4	7
Other answers	10	10
Don't know / no particular reason	4	1

L9: Why didn't you report (all of) the incident(s) to the police?

Base: all who have had (part of) bike stolen but did not report it to police (Total, 91; biking boroughs, 34* caution low base)

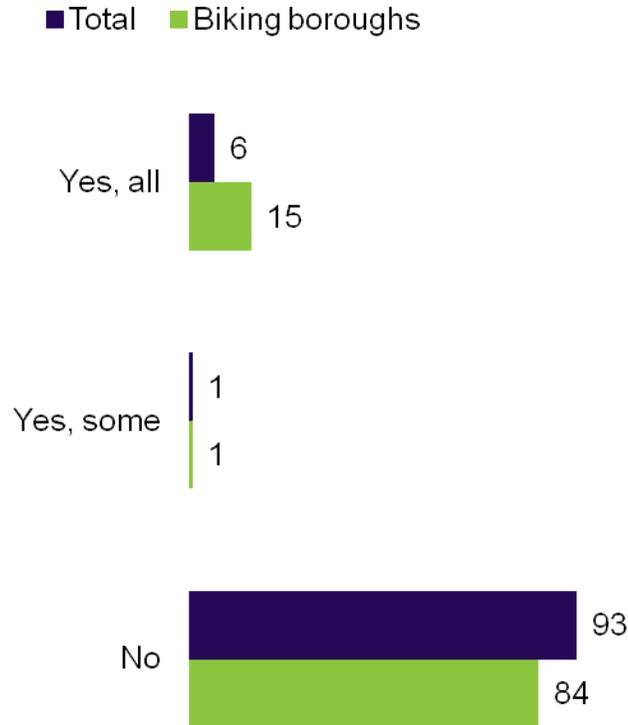


Recovery of stolen items

Whether stolen items were recovered / replaced

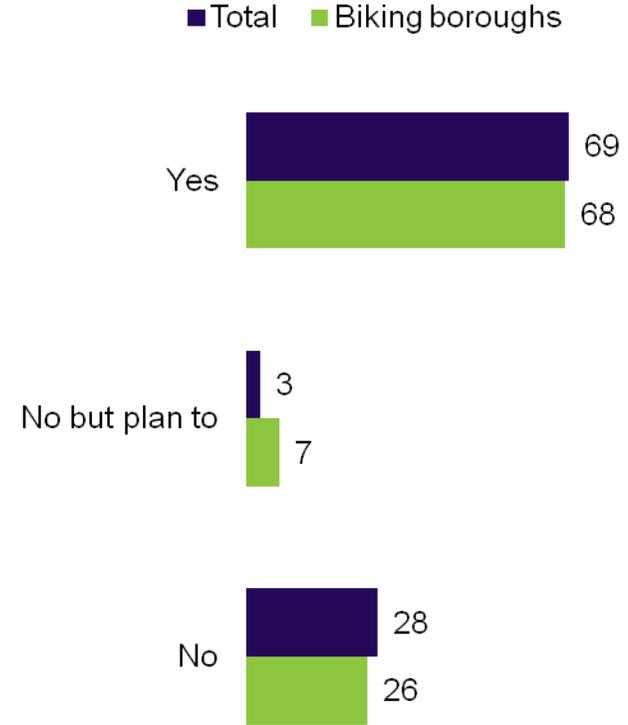
Whether recovered items that were stolen

%



Whether replaced the items not recovered

%



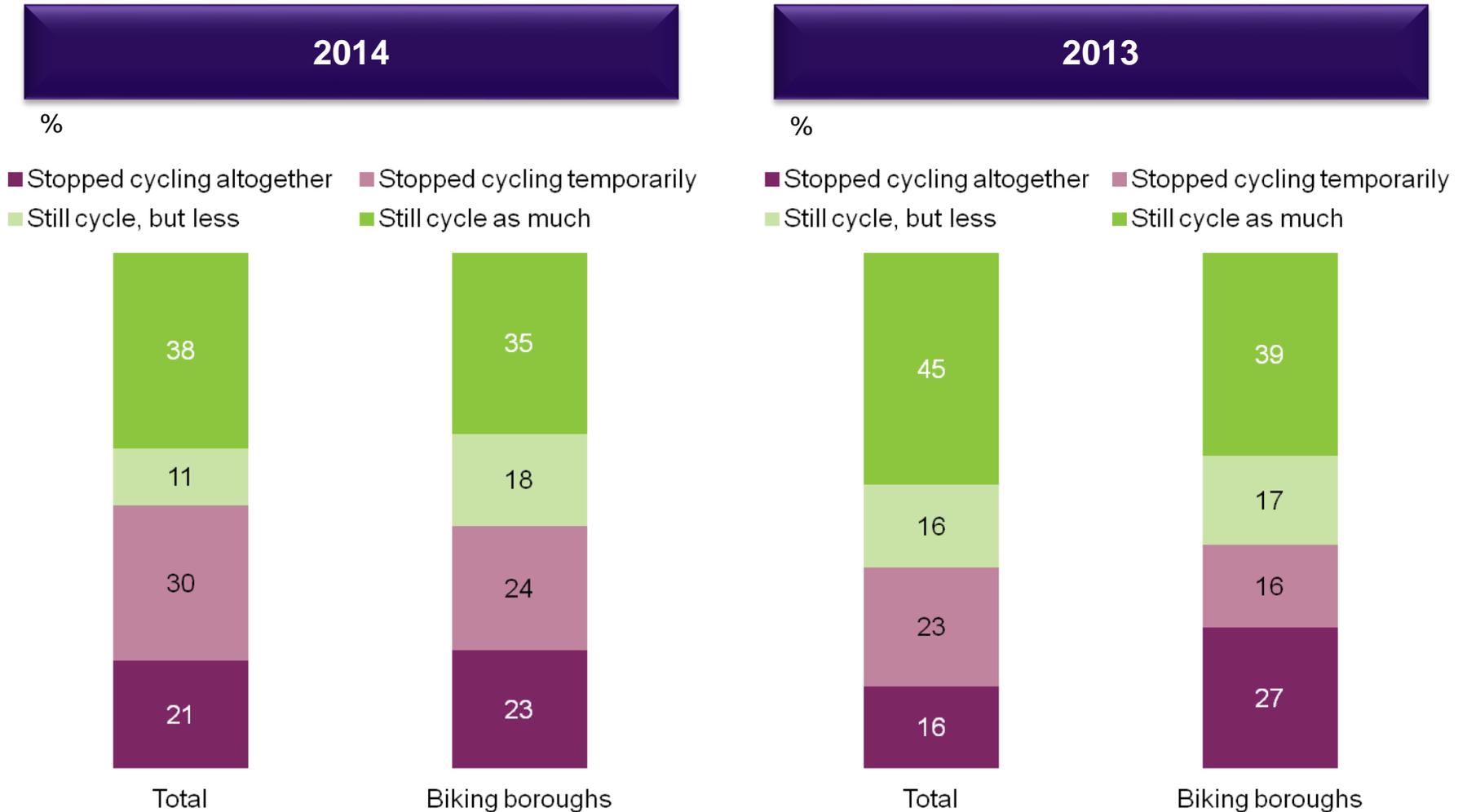
L10: Did you recover the items that were stolen? Base: Those who have had (part of) bike stolen (Total, 179; biking boroughs, 51)

L11: Did you replace the items that you did not recover? Base: Those who have had (part of) bike stolen and haven't recovered (Total, 172; biking boroughs, 46* caution low base)



Impact of cycle theft

Impact of cycle theft on level of cycling



L12: What impact did being a victim of theft have on your level of cycling?

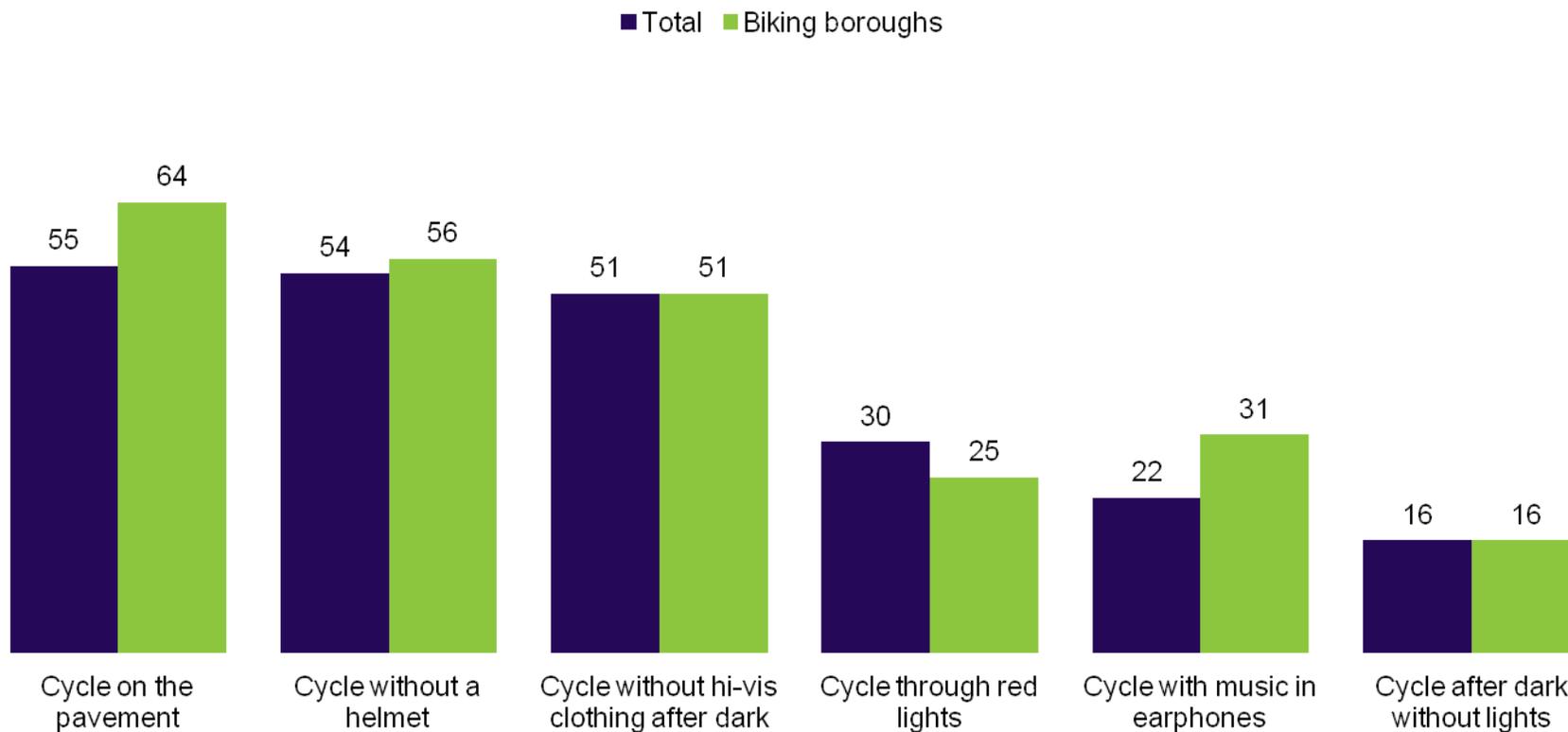
Base: Those who have had (part of) bike stolen (Total 2014, 179; biking boroughs, 51); 2013 (Total, 223; biking boroughs, 93)



Cycling behaviours

Prevalence of 'cycling behaviours'

%



J4: While cycling in London, do you ever do any of the following?

Base: all cyclists (Total, 518; biking boroughs, 86)