

**Motivating the near
market about cycling**

08072

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Research conducted by 2CV

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Introduction to the research

Background



- TfL has ambitious targets when it comes to cyclists: By 2025, the plan is to increase cycling by 400%, growing the modal share of cycling to 5%.
- While the current ad campaign has delivered an increase in cycling of over 90%, it has only been successful in making existing cyclists (7% of Londoners) cycle more. For a real sea change to happen, however, it is estimated that approx. 1 million non-cyclists will need to be persuaded to start cycling. This is termed as the 'near market' – those non-cyclists who have expressed that they would definitely or possibly consider cycling within the next 12 months, which equates to around 26% of Londoners.
- There are numerous infrastructural initiatives being planned to make cycling easier and more appealing, and, a comms campaign is now also planned to begin to break breakdown the barriers that the near market have to cycling and motivate them to try it out.
- This Qualitative research is therefore aimed at gaining a deeper understanding of the barriers to cycling amongst the 'near market' and to begin to understand what messages and interventions can most effectively help TfL work towards its ambitious targets for increasing the number of cyclists in London.

Research Objectives



Three key Objectives;-

1. To establish the **SALIENT BARRIERS** and key **MOTIVATORS** regarding cycling, amongst the **near market (adults who are definitely or possibly considering cycling in next 12 months)**
2. To test various **potential communications messages** amongst this target market, in the form of propositions
3. To test reactions to **existing interventions** (i.e. cycle guides) as well as various planned and potential initiatives (i.e. cycle hire, cycle training)

Methodology and Sample

- 10 x 2hr focus groups
- Homework exercise – where we got respondents to start thinking about their reasons for/for not cycling and deeper attitudes towards cycling in London prior to the groups.

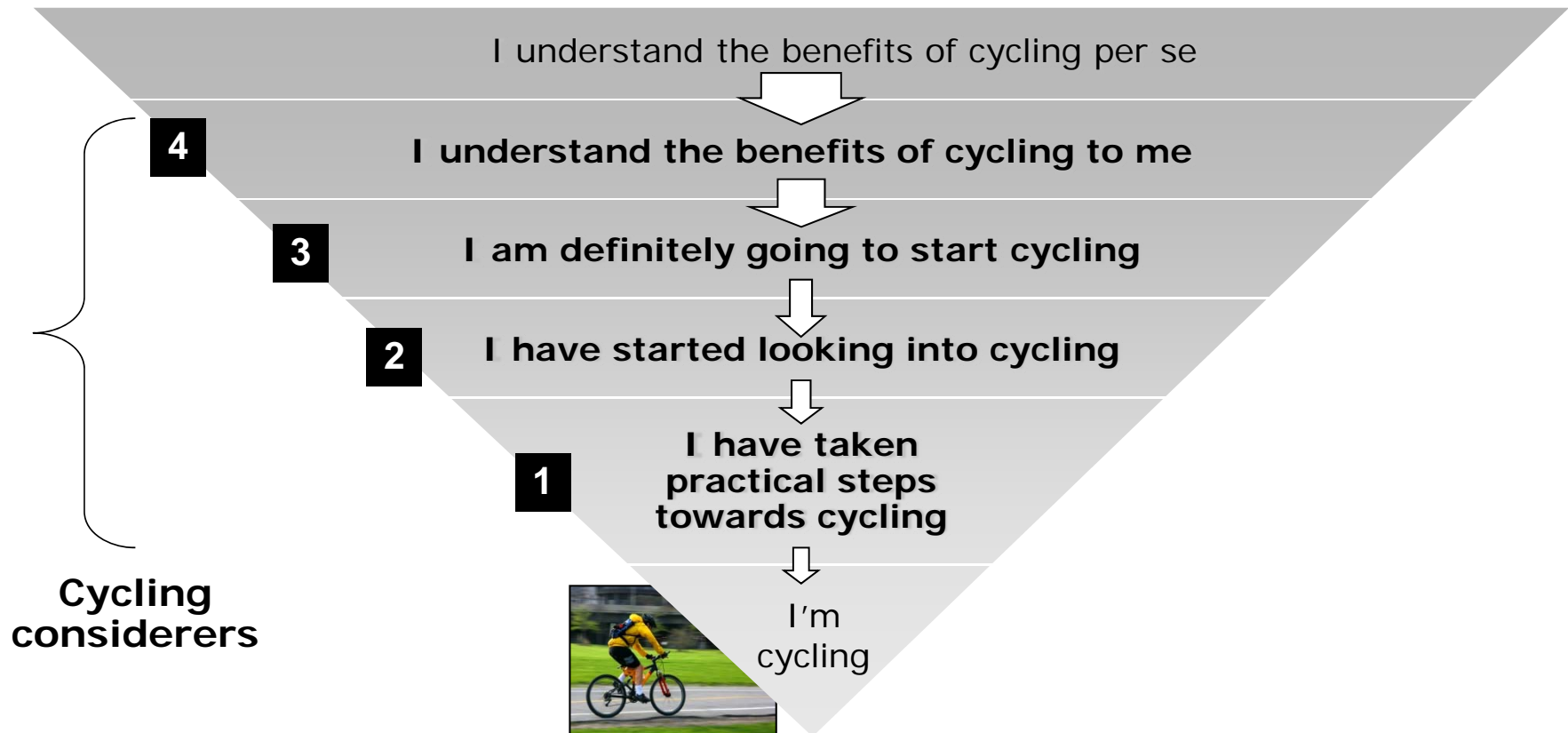
| Group | Age | Gender | SEG | Lifestage | Location |
|-------|------------------------|--------|-----|--------------|----------------------|
| 1 | 16-19yrs (Good spread) | Male | BC1 | Young Adults | Inner London Borough |
| 2 | 16-19yrs (Good spread) | Female | BC1 | Young Adults | Outer London Borough |
| 3 | 16-19yrs (Good spread) | Male | C2D | Young Adults | Outer London Borough |
| 4 | 20-30yrs (Good spread) | Female | C2D | Pre-Family | Inner London Borough |
| 5 | 20-30yrs (Good spread) | Male | BC1 | Pre-Family | Outer London Borough |
| 6 * | 20-30yrs (Good spread) | Female | BC1 | Pre-Family | Outer London Borough |
| 7 * | 31-44yrs (Good spread) | Male | BC1 | Family | Inner London Borough |
| 8 | 31-44yrs (Good spread) | Female | BC1 | Family | Inner London Borough |
| 9 | 31-44yrs (Good spread) | Male | C2D | Family | Outer London Borough |
| 10 | 31-44yrs (Good spread) | Female | BC1 | Family | Outer London Borough |

** Groups 6 & 7 were viewed*

- Half possibly/half definitely considering cycling in next 12 months
- At least 1-2 in each group owned a bike

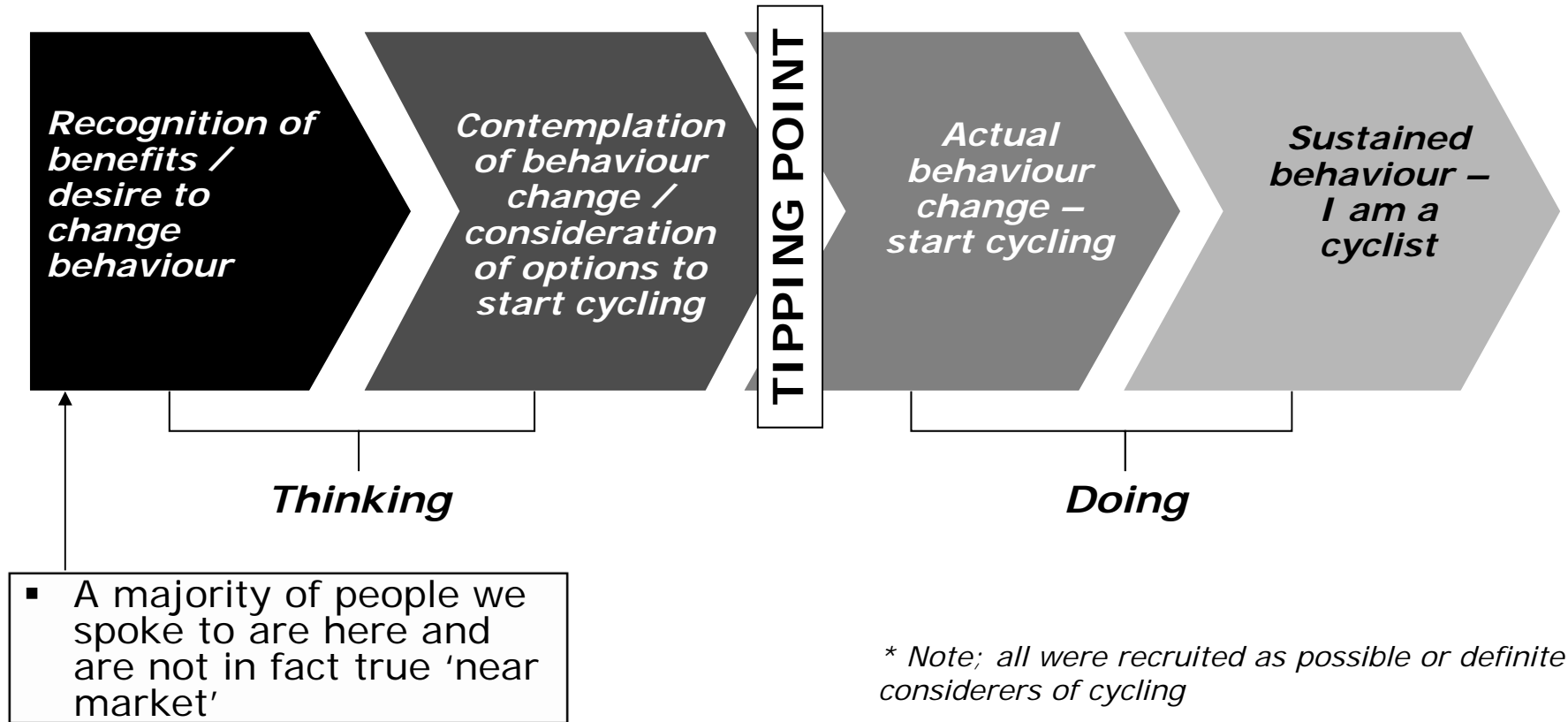
Contextual understanding on the near market

Within the 'Near Market' we saw many tiers of considerers



The 'Near market' cannot be treated as one group – there are different phases of consideration, with distinct mindsets and motivations

But most considerers are far away from the Tipping point



'Thinking' and 'Doing' are two very different phases. So, the actual 'Near market' (those actually viably contemplating behaviour change) is smaller than anticipated

'Apathy' underpins why many cycling considerers are not cycling

- While all in 'near market' have considered the benefits they would reap by cycling, many are in a state of inertia or 'status quo bias'

"I mean we all seem to know that cycling is cheaper, greener, more fun and better for you than most public transport... but mustering the energy to get off your ass and do it is easier said than done!"

(Pre-family, male, Outer London)

- A number have been considerers for many years
- One or two in every group tentatively admitted to being "lazy" about changing their behaviour – saying (on deeper reflection) that they possibly wouldn't become cyclists
- But this is more implicit through constant irrational excuses and contradictions about why not cycling

"I know what will happen... I'll buy a bike, use it once and then put it in the garage where I won't touch it again"

(Family, female, Outer London)

"I don't cycle at the moment because of the weather... Oh, on nice summer days gardening or DIY would get in the way of cycling..."

(Family, male, Outer London)

Many of these considerers may simply never cycle...

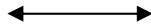
A discrepancy between past positive feelings and current negative experiences of cycling

On one hand...

- Most people have lots of warm feelings associated with memories of when they rode a bike as a child – although for some they may take a while to access!

"I remember cycling around with mates on the BMX... I certainly wasn't aware of any dangers then..."

(Family, male, Outer London)



But on the other hand...

- Most people (esp. in central London) have seen/heard/read negative experiences of cyclists/cycling...

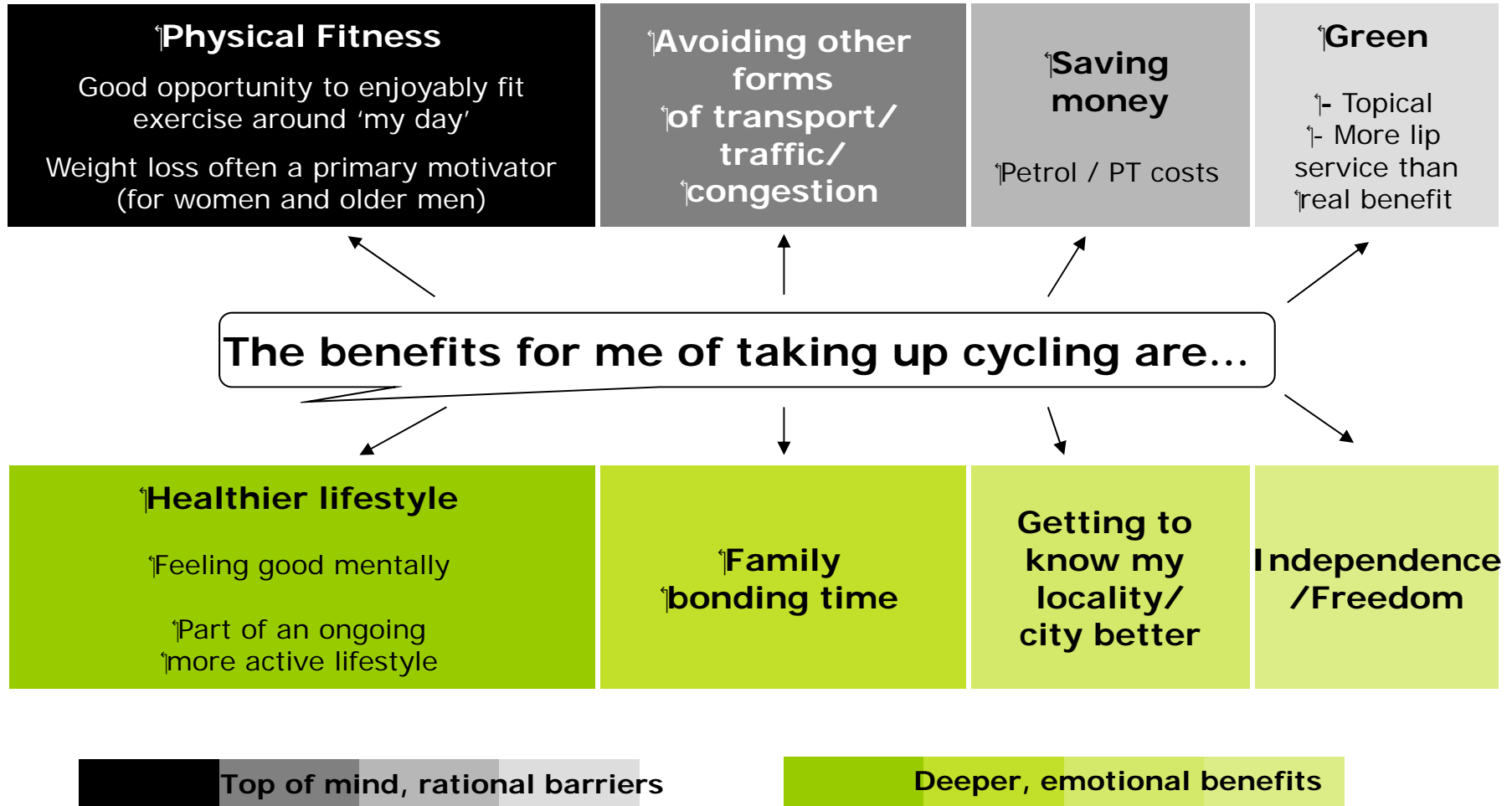
"I know various people who have been hit by cars... And I've seen some bad accidents involving bikes..."

(Pre-family, female, Inner London)

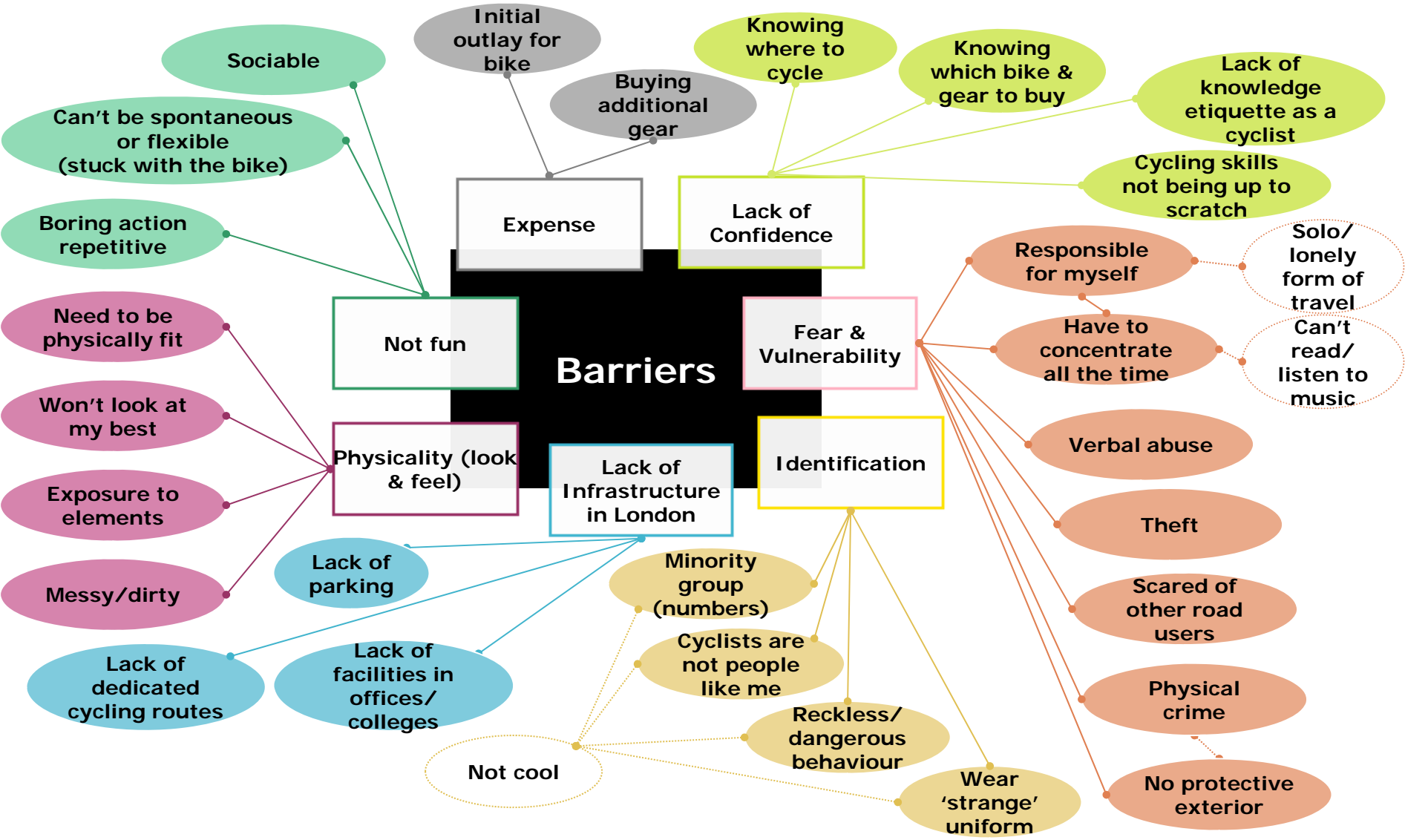


Potential for comms to leverage rich seam of nostalgic associations rather than dwell on realities of adult cycling?

Cycling benefits mentioned by all 'near market' are quite consistent – it's easy to be objective when not yet ready to 'own' the benefits



Barriers however, are numerous and interrelated



Key barriers vary by life stage; Younger 16-19 year olds...



Identification

- Something they stopped doing quite recently, so associated with being younger
- Not seen amongst their social group

“Cycling is for kids!”

(Younger female, Outer London)

Not fun

- Not seen as sociable
 - Other social activities seen as more fun (e.g. football, going out)
- Being stuck with bicycle can hinder new found freedom and desire for spontaneity

“My friends all go to college on the bus together... Cycling on my own would mean I'd miss out on the fun”

(Younger male, Outer London)

Physicality

- Image (and physical appearance) is paramount – cycling can get you dirty and make you look ugly (hair and make up esp. for girls)

“If I get my hair wet it goes frizzy... plus I'd get dirty...”

(Younger female, Outer London)

Expense

- Many other things they would rather spend their tight budget on before a bike

**Cycling may not fit with their current lifestyle and mindset...
but may become more salient in the future**

Key barriers vary by life stage; Pre-family 20-30 year olds...



Fear & Vulnerability

Lack of Confidence

Identification

Physicality

Lack of Infrastructure

- Approach cycling more purposefully (i.e. for commuting), therefore roads seen as more of a danger (esp. for females)
- Spending a lot of time driving or on PT, therefore removal of protective bubble can be greatest fear
- Drivers' perspective = lack of knowledge/etiquette as cyclist
- Picking up on more of negative/risky cyclist behaviour
- Appearance is important, therefore fear that cycling does not allow them to wear what they want (esp. women)
- Lack of parking and washing facilities in office

"Often the bike and the bus lane merge into one, and the bus drivers are nuts... I saw a guy get hit by a bus on Tottenham Court Road a few years ago and it really put me off"

(Pre-family female, Inner London)

"There must be something similar to the Highway code for cyclists?"

(Pre-family female, Inner London)

"You don't want to turn up to work soaking in sweat"

(Pre-family male, Outer London)

Current lifestyle means that cycling is a potential good fit (ie. need to travel/get out and about) but more deep-rooted barriers dominate

Key barriers vary by life stage; Young family 31-44 year olds...



Fear & Vulnerability

- Appreciate car as a safety bubble more than ever when have young family

Lack of Confidence

- Can feel like a long time since they cycled, therefore (women esp.) fear their skills won't be up to scratch

Physicality

- Worry they might not be fit enough
- Also worry they won't look right on a bike

"I think as a cyclist you would feel vulnerable on the street so you'd have to adopt this type of kamikaze attitude as a result."

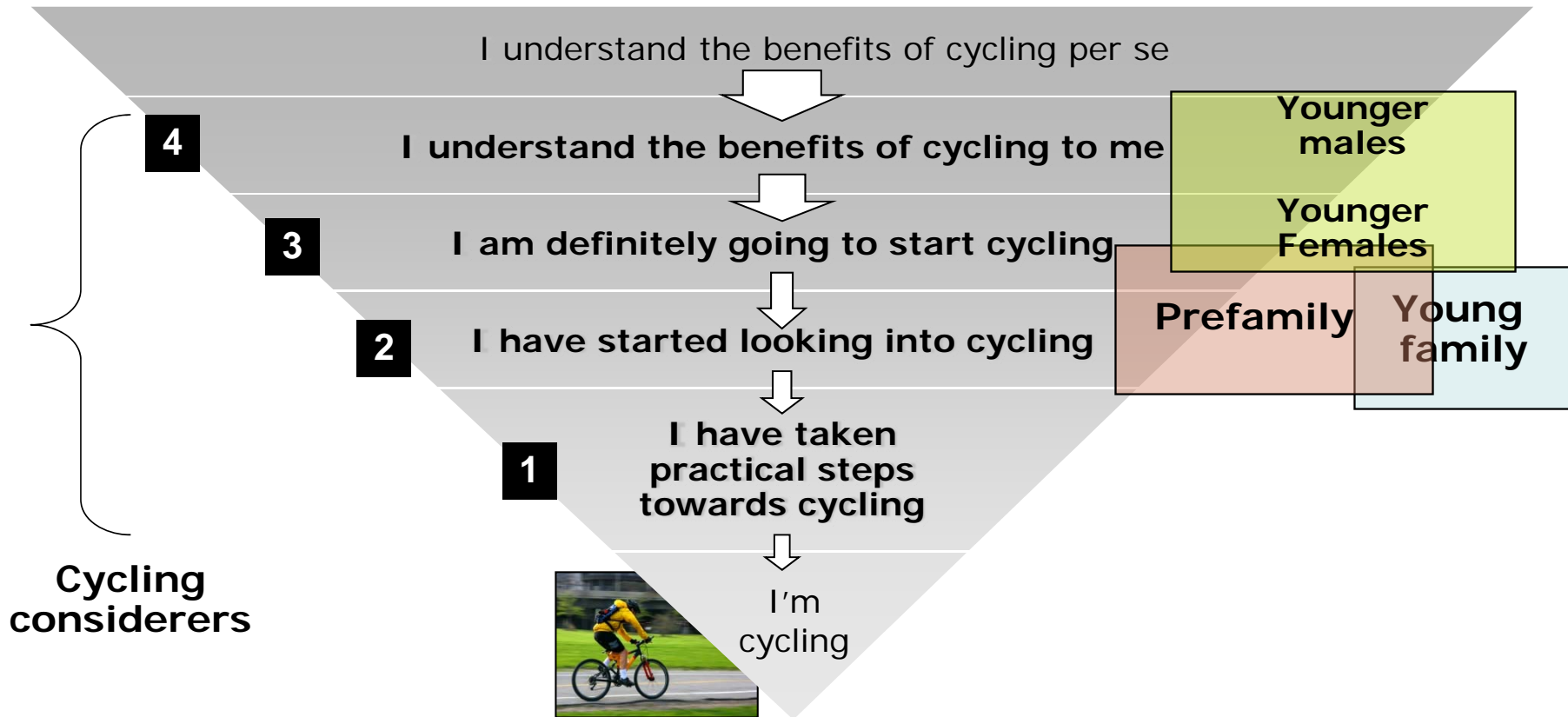
(Family male, Outer London)

"I'm just worried what my bum will look like on one of those saddles"

(Family female, Outer London)

Presence of young family can be a motivator to start cycling and less barriers exist than for other life stages, but these barriers can still be quite deep seated

Lifestage does partly influence proximity to the tipping point



The fit of cycling within lifestyle (eg presence of children/need to travel more) is a potential catalyst to cycling consideration

Feedback on Communication Propositions

(In order of strength)

WHAT'S STOPPING YOU

Overall appeal

- Works as a whole i.e. a two part proposition which sets up the tension and offers a solution
- First sentence - an accurate insight into how most cycling considerers (at all levels) are thinking
- Empathetic approach softens the headline which would not work alone
- Feels inclusive in theory and personal in tone

Who responds best

- Women especially, appreciate the offer of practical support
- Men less willing to admit that they need somebody else's help to start cycling
 - For younger men esp. it takes out the spontaneity of starting to cycle

Barriers message talks to

- **Addresses lack of confidence, vulnerability, no fun, responsible for yourself**

WHAT'S STOPPING YOU – Verbatim feedback

"It plants a seed in my mind that makes me think to try it, and makes me think that I haven't looked into it properly and maybe it has improved since last time I tried it."

(Pre-family male)

"This one is better than the other ones as it just reminds you that the bike is an option"

(Pre-family male)

"It made me think of looking on TFL (website) and figure out how they have made it easier to see if it was true. I didn't know about the route planner before. That would make me reconsider. (Pre-family male)"

"If you didn't know where to start it is telling you- gives you ideas so takes away the onus to do it yourself"

(Pre-family female)

"It's brilliant!" That's us we need help!"

(Pre-family female)

"It's positive as shows you have help out there like personal cycle trainers. There's a support network out there"

(Pre-family female)

TAKE CONTROL

Overall appeal

- Empowerment message appeals to a wide audience
- Highlights 'real' benefits which can't be disputed ie:
 - 'Instant' travel, door to door and not reliant on anything or anyone else
 - 'Control' is also associated with cost benefits – esp. motivating for younger or lower SEG

Who responds best

- 'Independence message' is particularly appealing to people who are reliant on others for travel Eg young people and Public transport users

Barriers message talks to

- **Reinforces strong benefits of cycling, as opposed to addressing specific barriers**

TAKE CONTROL – Verbatim feedback

"In London we spend so much time waiting for other people and transport to arrive. Other people are always in control of your travel arrangements"

(Pre-family female)

It plays on social opinions regarding transport- I quite like it. It's quite positive and it's a clear message. What they are saying is appealing- you don't have to wait for trains and buses.

(Family male)

"It relates to us, it's about the freedom to do what you want... you don't have to wait for anyone."

(Younger male)

"It feels like it is an honest message, it has admitted that there are delays with timetables. The other ones are less believable. It is picking up on the benefits of cycling by picking up on the negatives of public transport"

(Pre-family male)

"...as a car driver you know when and where there will be delays and you factor this in. Public transport is a little more unpredictable"

(Pre-family male)

"It is playing on the idea of being quicker but if it was a long journey then it wouldn't be quicker... Shorter journeys may be quicker though because there are less factors to get in your way"

(Pre-family male)

RECONSIDER THE BIKE

Overall appeal

- Has some appeal but is not a single-minded proposition and can therefore confuse
- Three strands:
 - Nostalgia – reconsider/remember cycling
 - The world of cycling has changed
 - Think about which of your journeys could be substituted
- **Nostalgia** is the most powerful strand – personal, emotive and can't be disputed
- **'World of cycling has changed'....** lacks credibility as no radical improvements are visible to non-cyclists – can prompt curiosity but is also open to scrutiny
- **'For some journeys.....'** is appealing because it is gently getting you to question your behaviour
 - But could be stronger with proof from initiatives and highlighting benefits

Who responds best

- Possibly 4th tier considerers (ie. furthest away) as plants early seeds about cycling but generally not direct enough call to action

Barriers message talks to

- **Nostalgic feelings around cycling can start to address some barriers:**
 - **'lack of fun'**
 - **'not for people like me'**

RECONSIDER THE BIKE – Verbatim feedback

“I don’t really get how cycling easier – it’s the same as it ever was. Funny thing to say – it hasn’t alleviated my doubts”

(Pre-family male)

“If it was true and there was lots happening it would be fine but I haven’t seen anything ‘happening’. I’m confused by this”

(Pre-family male)

“They have the lanes but they are not everywhere, they are not consistent, they just disappear”

(Family female)

“It’s about thinking about your daily routine and thinking about which journeys you could do on your bike”

(Family female)

“It makes me think of when I used to enjoy mucking about with my bike when I was younger”

(Younger male)

CYCLING FEELS GOOD

Overall appeal

- Hypothetical benefit unless already cycling – therefore although appealing, not strong enough call to action
- Simply saying that cycling feels good does not directly address the barriers that are hindering cycling uptake:
 - vulnerability, lack of confidence, no fun, physical experience
- Some can reject that cycling will make you feel good at all – e.g. younger males feel cycling could be boring/repetitive –

“Football makes me feel good, not cycling”

Who responds best

- Those intending to cycle for pleasure - more about fun and relaxation in nice surroundings
- Those intending to commute feel that this doesn't reflect what they would experience on the roads on a day to day basis (e.g. fresh air and sights vs pollution and traffic)

Barriers message talks to

- **Mainly reinforces benefits as opposed to addressing barriers**
- **Cycling is ‘No fun’ is addressed**

CYCLING FEELS GOOD – Verbatim feedback

“Cycling makes you feel good until someone comes along and swipes you off your bike... You are in a good mood until you get to the office soaking wet and then come out and someone has stolen your bike.”

(Pre-family female)

“It applies more to outer London, there is no fresh air in central London!”

(Family female)

“It hits on one of the best aspects of riding a bike – the feelgood factor and the independence and freedom”

(Pre-family male)

“That is good – not using the bike to do journeys necessarily but for being out and about and spending time with the kids”

(Family female)

“...It sounds a bit Utopian and ignores the reality of it, I think...”

(Pre-family male)

“I wouldn't pay any attention to this... It's obvious and tells me nothing new. Who doesn't know that cycling is healthy?”

(Younger female)

IT WON'T TAKE AS LONG AS YOU THINK

Overall appeal

- Cycle journey times are surprisingly shorter than they think and can promote some curiosity
- However, for most, a small gain in time is not enough of a motivator to start cycling
- Raises lots of questions around who/what type of cyclist this is based on and what routes they are taking

Who responds best

- People who say they might commute by bike (more likely inner city males)

Barriers message talks to

- **Cycling journey time not a real barrier or motivator – a nice to have**

IT WON'T TAKE AS LONG AS YOU THINK

**"If I have to come in on the train I
am not suddenly going to change
and get out my bike"**

(Pre-family)

**"It's quite surprising, but it's not
suddenly going to make me what
to cycle more"**

(Family male)

**"Who cycled it? How do you actually know
this is how fast it will be for me"**

(Younger male)

"Four minutes... big deal!"

(Younger male)

EVERYBODY'S DOING IT

Overall appeal

- Idea of more and more people cycling lacks credibility
 - Outer Londoners esp. not noticing more people cycling
- 'People like you...' can grate
 - Not witnessing people in their social circle cycling
 - Actually draws attention to the fact that 'cyclists aren't like me' – very fit, lycra clad, etc.
- Feel coerced to join a growing club that doesn't exist
- But can hint at mass appeal and safer cycling

Who responds best

- Limited appeal
- Can be patronising and can turn more independent-minded (younger esp.) away

Barriers message talks to

- **Mass participation is something that needs to be personally witnessed, not told**

EVERYBODY'S DOING IT

"This is almost making you feel guilty. I want encouragement, not guilt"

(Pre-family female)

"I don't like being pushed into something, because everyone else is doing it"

(Pre-family female)

"Joining a community seems a bit naff – I want to do it for myself. It's like being told what to do"

(Pre-family male)

"Makes me think that it's not just targeting the really fit so it's not such a big deal but I'm not sure that I believe it as you can't see them"

(Family female)

Feedback on Proposed Interventions

(In order of strength)

CYCLE HIRE

Overall appeal

- Quite appealing – works as strong proof that London is becoming more cycle friendly and is an inclusive initiative
- Great for trialling bike before you buy
- More about occasional than regular journeys

Who responds best

- Appeals to lots of potential targets:
 - Parents see as great day out with the kids
 - Young women to practice until confident
 - More confident males – useful travel mode without commitment/hassle

Key barriers addresses by initiative

- **Expense**
- **Lack of confidence**
- **Lack of infrastructure**

CYCLE TRAINING

Overall appeal

- Highly appealing for some targets – real help not rhetoric

Who responds best

- Welcomed by certain groups of women – happy to admit aren't skilled or experienced and receptive to practical help
- Rejected by most males – should be intuitive, sign of weakness and would prefer to seek help from friends and relatives if necessary

Key barriers addresses by initiative

- **Lack of confidence**
- **Fear and vulnerability**
- **Identification**
- **Physicality**

GREENWAYS

Overall appeal

- Quite appealing across the board as it brings out the fun/enjoyment of cycling
- Some confusion about whether it is legal to cycle through parks anyway - so needs to be made clear that this is extending where you can legally cycle
- 'Canals' can allude to crime because seen as isolated spot

Who responds best

- Most people who didn't envisage commuter journey
 - Potential leisure cyclists are most positive – people who will just concentrate on enjoying cycling without external stresses
- *"Probably safer- rather be on a greenway in a park than anywhere else."* (Family male)
- *"I'd like to cycle on something like this- I'd just assume they would already be there! Like I would have thought you could cycle through parks already."* (Family male)

Key barriers addresses by initiative

- **Fear and vulnerability**
- **Lack of confidence**
- **Infrastructure**
- **Identification**
- **Not fun**

Overall appeal

- Appeals widely - like idea of everything for everyone on one site
- Felt to cover everything they could possibly need – really interested by immediacy and availability of large pool of info on cycling
- Surprising to those who regularly use TfL.gov.uk for Journey Planner – *“...had no idea this existed on a site I already use almost every day!”*
- Would need to be made more overt to be used as a regular tool

Who responds best

- Everyone to some degree – but mainly those in Tiers 1 & 2 (the ‘Nearest’ market)
 - *“I’d go to the website to look into the greenways and to find out about reputable bike places - objective info. Like to know about the clothes and social cycling groups, cycle routes, discount vouchers, places you can lock your bike”*

Key barriers addresses by initiative

- **Lack of confidence**
- **Lack of infrastructure**
- **Fear & vulnerability**
- **Expense**
- **Identification**

CYCLE GUIDES

Overall appeal

- Appeals as planning where to go (routes) is a big consideration and worry for many - one area where they feel they need a lot of guidance and advice
- Some minor concerns as to how these can be used when on a bike, but most imagine using as pre-journey planner
- Some awareness of cycle guides already
- Imagine guides being available on the internet too

Who responds best

- Reassures those in Tier 3 and acts as practical tool for those in Tiers 1 and 2
- Leisure cyclists (females esp.) like to be given information about where to cycle safely (through recommended routes) – as fear getting lost and cycling somewhere unsafe
- Inner London potential commuters imagine using to plan best routes to work or other destinations
- Some of the younger cyclists feel they already know local area well, so maybe less need for this

Key barriers addresses by initiative

- **Lack of confidence**
- **Lack of infrastructure**

OFFERS TO GET YOU STARTED

Overall appeal

- Everybody reacts well to the idea of getting discounts
- But prompts cynicism – don't expect something for nothing, expect cheapest bikes i.e. a catch

Who responds best

- Those 'middle' considerers in Tier 2 or 3
 - *"This would help once you have decided to get a bike, but the big decision is to get a bike"*

Key barriers addresses by initiative

- **Expense**

GET YOUR OLD BIKE CHECKED OUT AND SERVICED

Overall appeal

- Possession of a bike = not an actual motivation to start cycling
- Assumes you have a bike that simply needs servicing
- The males would have no problems doing their own servicing of their bike – see it as easy and this can be half the fun

Who responds best

- Appeals to some bike owners, but would not actually prompt people to cycle

Key barriers addresses by initiative

- **No particular barriers**

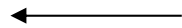
Impact of cycle safety ads



- Cycle safety ads (esp. Moon walking bear) have little positive or negative effect on cycling considerers
- Seen as targeting motorists, not cyclists
- However, some evidence from 'Whodunnit' ad that reference to 'fatality' can be counterproductive in recruiting cyclists

Summary; how barriers can be addressed through propositions and initiatives

Lack of confidence



MESSAGES

- *'What's stopping you?'*: Empathy and Support

INITIATIVES

- Cycle Hire, Cycle Training, Cycle Guides, Website

Fear & vulnerability



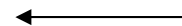
MESSAGES

- *'What's stopping you?'*: Support and community
- *'Everybody's doing it'*: Mass participation

INITIATIVES

- Cycle Training, Greenways, Website

Identification



MESSAGES

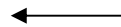
- *'Everybody's doing it'*: Mass participation
- *'Reconsider the bike'*: Nostalgia and positive associations

INITIATIVES

- Cycle Hire, Website

Summary; how barriers can be addressed through propositions and initiatives

Lack of Infrastructure



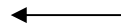
MESSAGES

- *'What's stopping you?'*: supporting initiatives (Greenways and Parking)

INITIATIVES

- Cycle Hire, Greenways, Cycle Guides, Website

Physicality



MESSAGES

- *'Cycling feels good'* Emphasising enjoyable physicality

INITIATIVES

- Cycle Training, Greenways

Not Fun



MESSAGES

- *'Everybody's doing it'*: Sociability
- *'Reconsider the bike'*: Nostalgia and positive associations
- *'Cycling feels good'*

INITIATIVES

- Cycle Hire, Greenways, Cycle Guides, Website

Expense



MESSAGES

- *'Take control'*: limiting expenditure on PT/petrol

INITIATIVES

- Cycle Hire, Offers to get you started, Website

Conclusions & Recommendations

Summary & recommendations 1

- The 'Near market' is not one homogenous group - they can be segmented according to where they are in the consideration process
- There are fewer people than anticipated near the actual tipping point
- While most people understand the benefits to them, 'apathy' means they haven't committed to doing anything about it and therefore are further away from uptake
- The benefits of cycling are quite simplistic and generic and considerers are able to talk about them easily regardless of their motivation towards cycling
- In contrast, the barriers to cycling are complex and vary according to life stage and consideration phase
- Fear & Vulnerability, Lack of Confidence and Lack of Identification are the most deep-rooted and emotional barriers, which will be harder to overcome

Summary & recommendations 2

- There is no one bullet solution that will move all cycling considerers closer to the tipping point
 - Different messages and initiatives work with different audiences to move considerers up the consideration tiers
- However some propositions are more motivating than others:
 - Of those tested **'What's Stopping You'** is strongest as combines the problem and insight with a solution in an empathetic way. The tone is inclusive and addresses key barriers of lack of confidence, feeling alone and lack of infrastructure
 - Components of other propositions also have merit for their emotional insight but are not necessarily standalone propositions as they do not incorporate a solution or practical offer of help:
 - **'Take Control'** acknowledges desire to be independent when travelling
 - **'Reconsider the bike'** can evoke positive memories of childhood cycling

Summary & recommendations 3

- Less motivating propositions are:
 - **'Cycling feels good'** either too obvious or open to scepticism
 - **'It won't take as long as you think'** – journey times not key motivation to cycle and can be easily disputed
 - **'Everybody's doing it'** – tonally patronising and lacks reason to believe

- Any messages would benefit from simultaneous support from the initiatives
 - The most motivating initiatives for considerers are (in order); -
 - **Cycle Hire, Greenways** are the strongest evidence of cycling as a mainstream movement and of London having a cycling infrastructure
 - **The Website, Cycle Guides and Offers** work well at planning stage
 - **Cycle Training** is appreciated esp. by females as addressing numerous barriers, but it is debatable how many would take it up

- The initiatives coupled with key communication messages will provide support for cycling as a mass movement (i.e. a 'normal' behaviour)

Communication learnings from the propositions tested

- Tone of voice would benefit from being inclusive and empathetic, rather than dictatorial
- If a problem is raised, more impact will be achieved if a solution is offered
- Claimed facts (i.e. 'more and more people like you are getting on their bikes') should ideally be backed up with proof, otherwise people will reject them
- There is potential to tap into nostalgic associations and get people to start thinking about cycling as something more positive and enjoyable