

Transport for London

Attitudes towards cycling

2011

05110

April 2011

MAYOR OF LONDON

Transport for London



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Research conducted by SPA Future Thinking

Introduction

The Mayor of London and Transport for London (TfL) have a target to increase cycling from its 2001 level of 2% to 5% by 2026. This equates to a 400% increase compared to 2000 levels.

“Attitudes towards Cycling” has been conducted since 2005 to assess cycling activity and attitudes amongst Londoners.

The results shown here are from the March 2011 survey which comprised 1,066 telephone interviews with adult Londoners. Data are weighted to represent the London population in terms of age, gender, ethnicity, working status and location (inner/outer London).

Reporting note

Since June 2010 there has been a change in how cyclists and non-cyclists are categorised. All previous data shown here have been amended to reflect this change in definition and therefore slight differences with previous reports will be seen. There is a table showing how the definitions have been changed on the next slide of this report.

Research conducted into cycling is affected by seasonality as the summer months see a greater level of cycling than other seasons. This should be borne in mind when interpreting findings.

Throughout this report, data from March 2011 are compared with previous waves of research. Statistically significant differences with previous waves are shown as follows:



Significantly lower than March 2011



Significantly higher than March 2011

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

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

A note on the appendix to this report

Further data gained from the Attitudes towards Cycling research programme are found in the appendix of this report.

In some slides, data collected in between the annual survey are included for reference; the two data collection points outside of the normal March survey at June and October 2010.

These data are not reported in the main body of the report as attitudes towards cycling are influenced by seasonality more than attitudes towards other modes, and therefore year on year comparisons with data collected at the same time are the most reliable indicators.

SUMMARY

Summary

The picture of cycling

Evidence suggests that the 'year of cycling' continues to have a positive impact on levels of cycling in London. 19% of Londoners now cycle, this is in line with October 2010, and significantly higher than this time last year (when the figure was 16%).

Scope remains for more Londoners to take up cycling. 40% of Londoners have access to a bicycle in their household and almost nine out of ten know how to ride a bike. A quarter of Londoners say that they could (but do not currently) commute by bike.

Both cyclists and non-cyclists say that if they started cycling, or cycled more, these cycling trips would be instead of bus and car journeys.

Behaviour that lies behind choosing to cycle

TfL has developed a behaviour change model to assess cyclists' and non-cyclists' propensity to increase their level of cycling.

Current cyclists are most likely to be 'normalised' to cycling more (39% are in this category), meaning they are already 'cycling more, and will continue to do so'. There has been no significant change in this since this time last year.

Most non-cyclists (61%) are 'pre-primed' to the idea of taking up cycling (meaning they 'would not consider it', 'have never thought about it', or 'have given it thought but are not going to do it').

Just over a quarter (27%) are 'primed' to take up cycling (meaning they are 'thinking about it', 'have decided to do it' or 'were doing this but couldn't stick to it').

Motivators and deterrents

For both current cyclists and non-cyclists, there are similar motivators and barriers to cycling more/taking up cycling.

Increased fitness continues to be the main motivator, with saving time and money also driving interest in (more) cycling. Concern about safety is the most commonly mentioned deterrent to increasing/taking up cycling.

More than half of cyclists rate the availability of cycle racks and the security of their bike when left as poor or very poor.

For non-cyclists, cycling remains a relatively unappealing mode of transport – the least appealing of the major modes.

Attitudes towards cycling

Amongst both regular and occasional cyclists*, trips within the local area are thought to be more appealing than journeys outside the local area and within central London.

There has been little movement in various attitudes towards cycling since October 2010.

Many of the attitudes are positive, such as the view that cycling is becoming more popular and that it is a convenient and interesting way to travel. However, the perception that cyclists are vulnerable to other road users and that traffic makes people afraid of cycling is still common.

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

Barclays Cycle Hire

Since its launch, awareness of Barclays Cycle Hire has risen dramatically, though awareness has remained steady since autumn last year.

A small proportion of Londoners have used the scheme (3%) though one-in-five non-users say they are likely to make use of the scheme in the future.

Half of those who have used the scheme (or are likely to use it) say they would have been unlikely to cycle had the scheme not been launched.



Barclays Cycle Superhighways

The first two Barclays Cycle Superhighways were also opened last year to provide routes for cyclists travelling into central London.

Since last summer, awareness of the Superhighways has risen substantially. There has however been a slight decline in the proportion aware of the Superhighways since October 2010.

3% of Londoners have made use of the routes, with a further 17% of non-users likely to use them in the future.

Just under half of those who have used/say they will use the Superhighways state they would have been unlikely to cycle had the scheme not been launched.



PROFILE OF CYCLISTS

Profile of cyclists by frequency of cycling

19% of Londoners cycle*; this figure has remained unchanged since June 2010, but is significantly higher than this time last year.

Of those who cycle, 68% do so at least once a week, with the remaining third being 'occasional cyclists'. The proportions of regular and occasional cyclists remain in line with October 2010.

Around one-fifth of cyclists (21%) use their bike at least five days a week.

There has been no significant change in the frequency of cycling amongst occasional cyclists since October 2010, though there has been a slight decrease in the proportion of regular cyclists cycling 5 days a week or more.

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

Potential for increasing cycling

There is considerable scope for increasing the incidence of cycling: 40% of Londoners have access to a bike in their household, and 84% know how to ride one. Younger Londoners, males, and those in employment are more likely than other groups both to own and to know how to ride a bike.

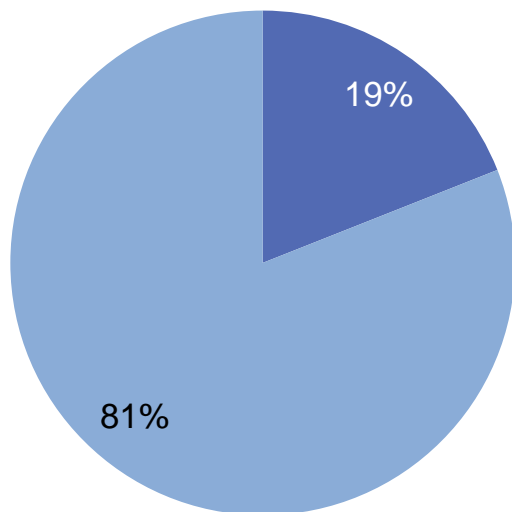
7% of Londoners commute by bicycle at present, remaining unchanged since October 2010. 86% of these commute by bike at least once a week.

A quarter (24%) of Londoners could commute by bike but don't currently.



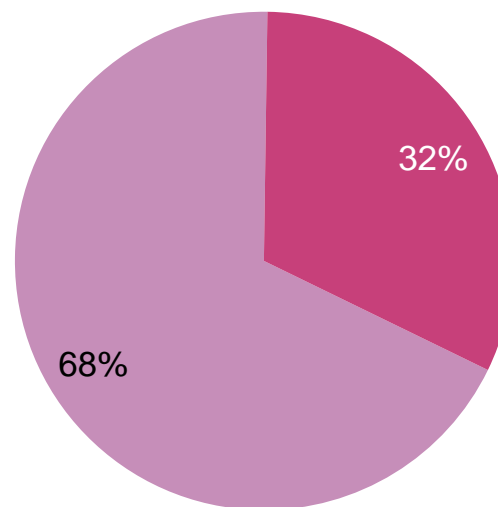
19% of Londoners cycle; two-thirds of these cycle at least once a week

CYCLISTS AND NON-CYCLISTS



■ Cyclist ■ Non-cyclist

BREAKDOWN OF REGULAR AND OCCASIONAL CYCLISTS



■ Regular cyclist ■ Occasional cyclist

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

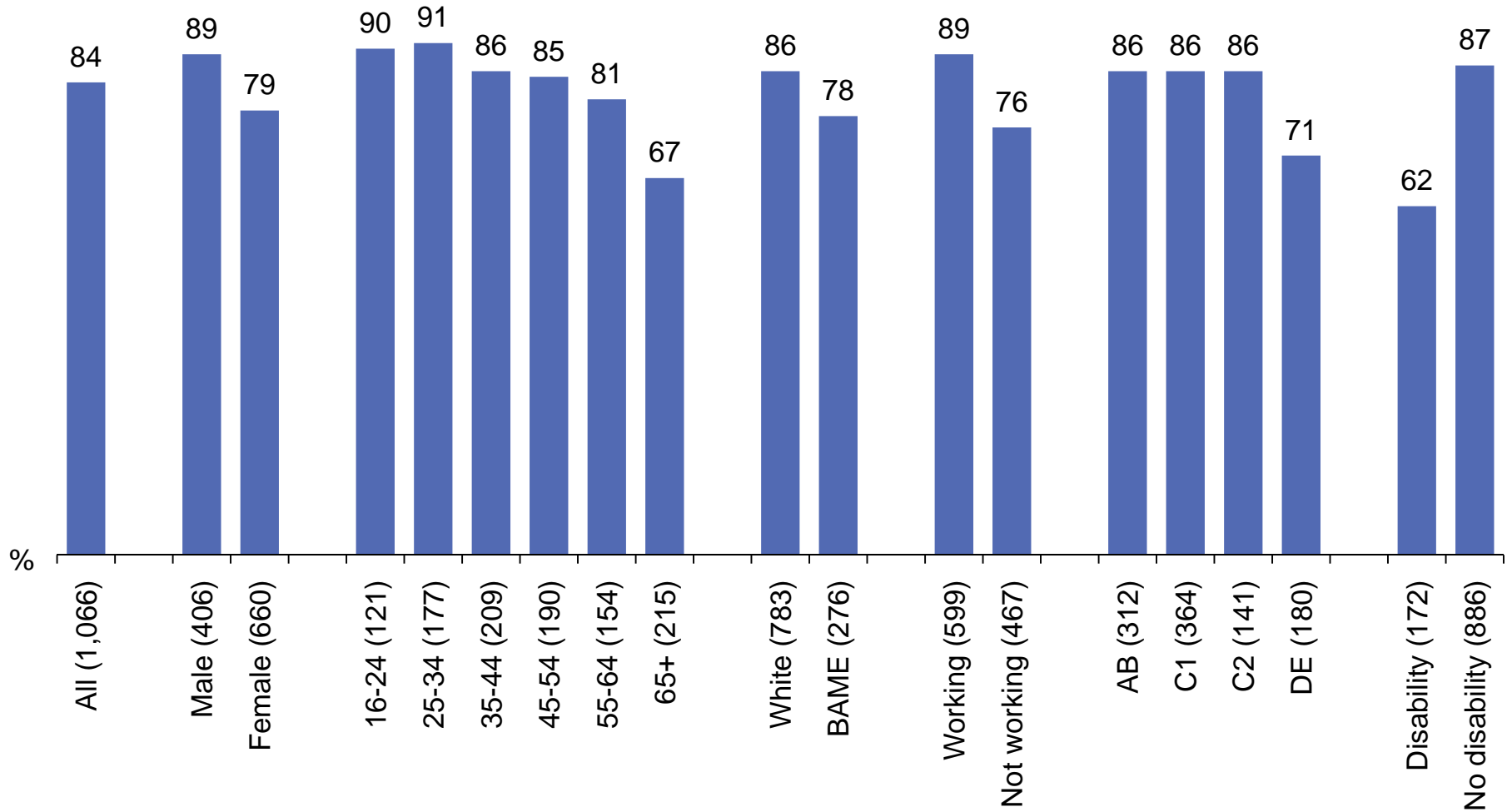
Regular cyclists are defined as cycling at least once a week. Occasional cyclists cycle less often than once a week

QFREQ: Which of these modes of transport do you ever use to get around London? Base: all (1,066) QFREQ_BIKE: Typically, how often do you use a bicycle to get around London? Base: All cyclists (176)



84% of Londoners can ride a bike

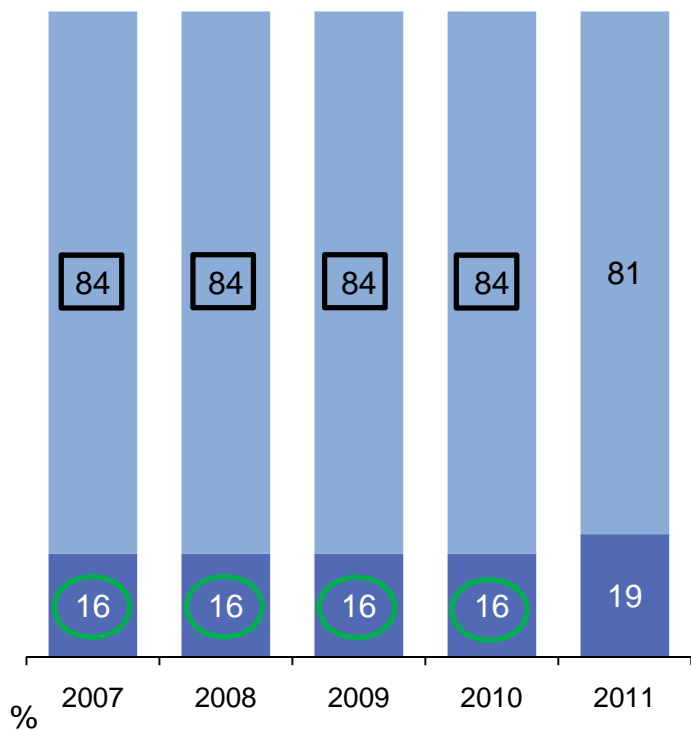
Percentage able to ride a bike



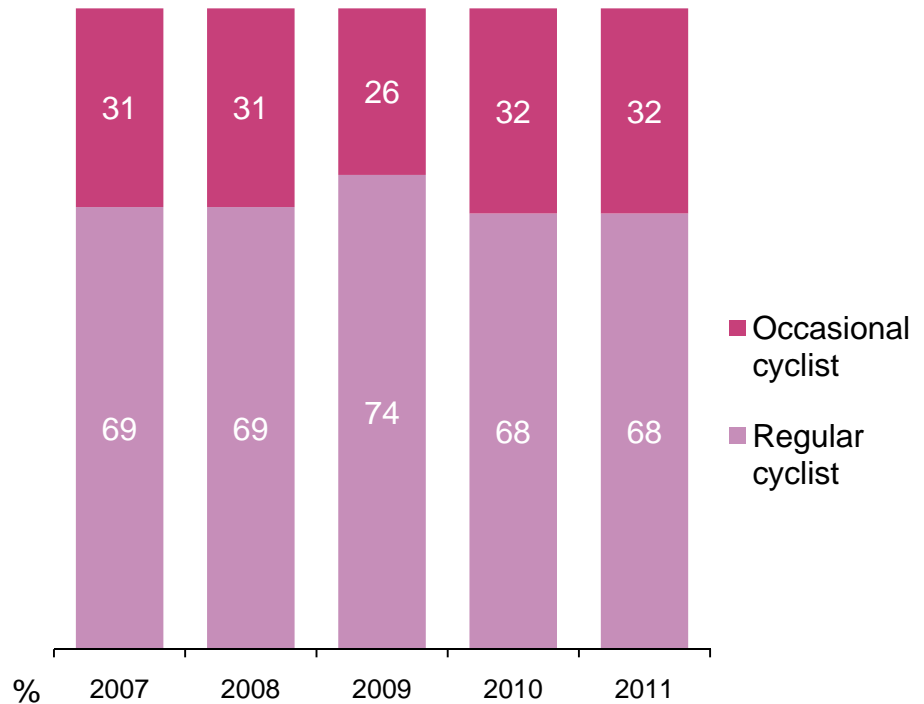
QBIKE1: Can you ride a bicycle?

Base: All

Significantly more Londoners cycle now compared with any previous year



■ Non-cyclist
■ Cyclist



■ Occasional cyclist
■ Regular cyclist

○ Significantly lower than 2011

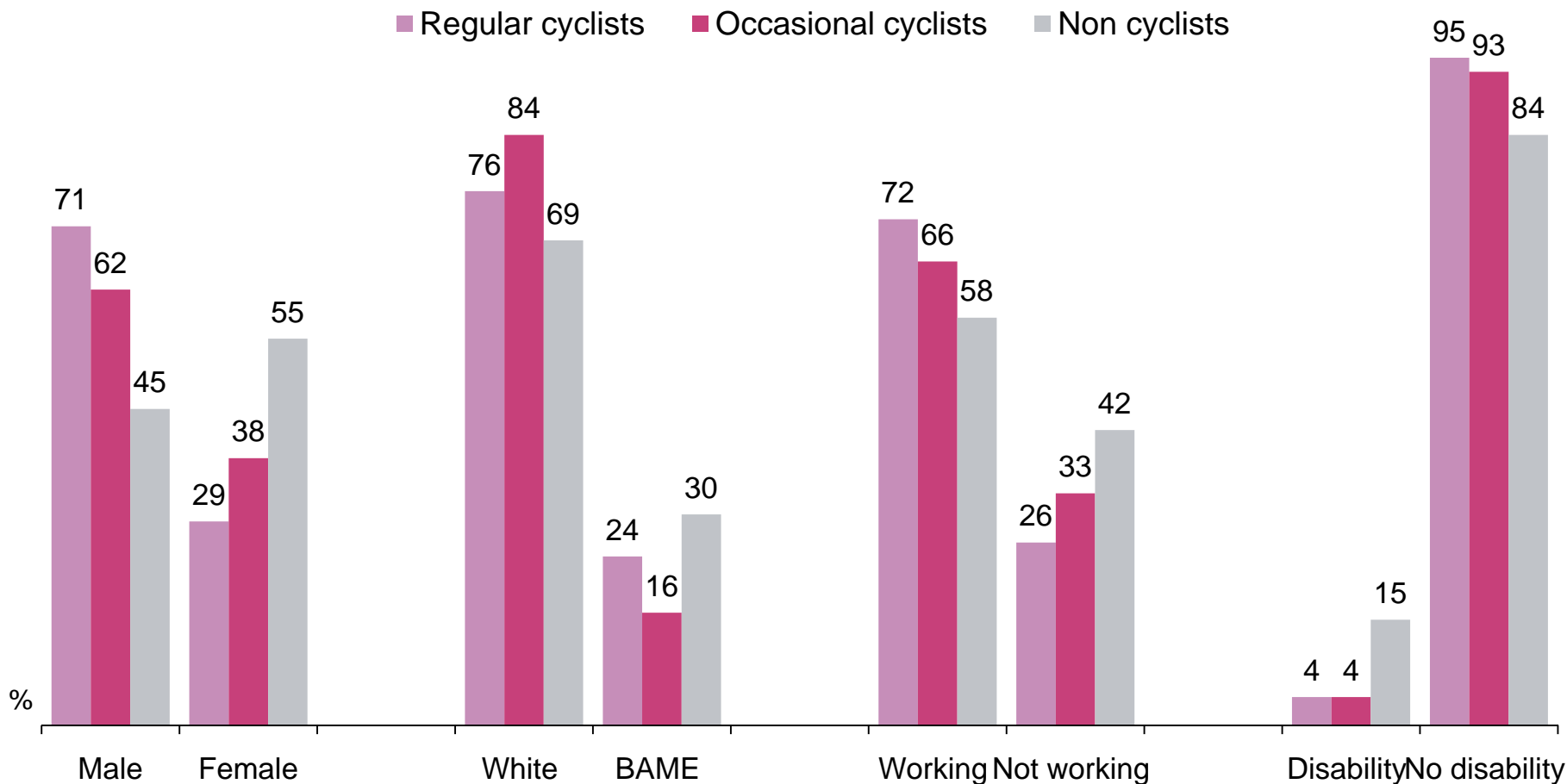
□ Significantly higher than 2011

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



Regular cyclists are more likely to be male, white, in work and without a disability

Profile of cyclists



Demographic questions

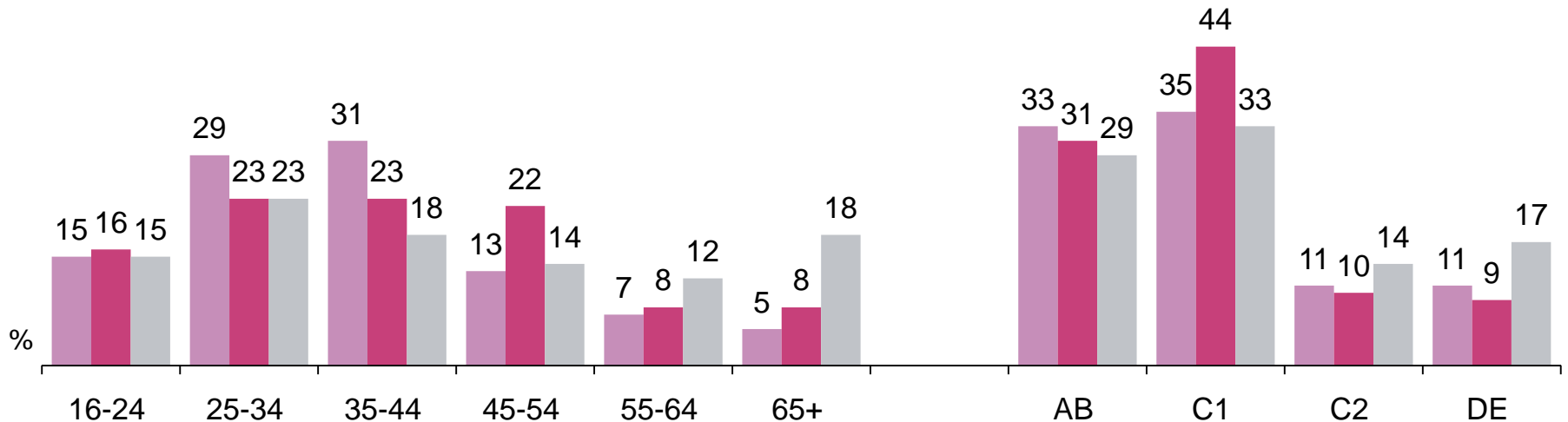
Base: All – Regular cyclists (115), Occasional cyclists (61), Non-cyclists: (890)



Most cyclists are aged between 25-44 and classified as living in ABC1 households

Profile of cyclists

■ Regular cyclists ■ Occasional cyclists ■ Non cyclists



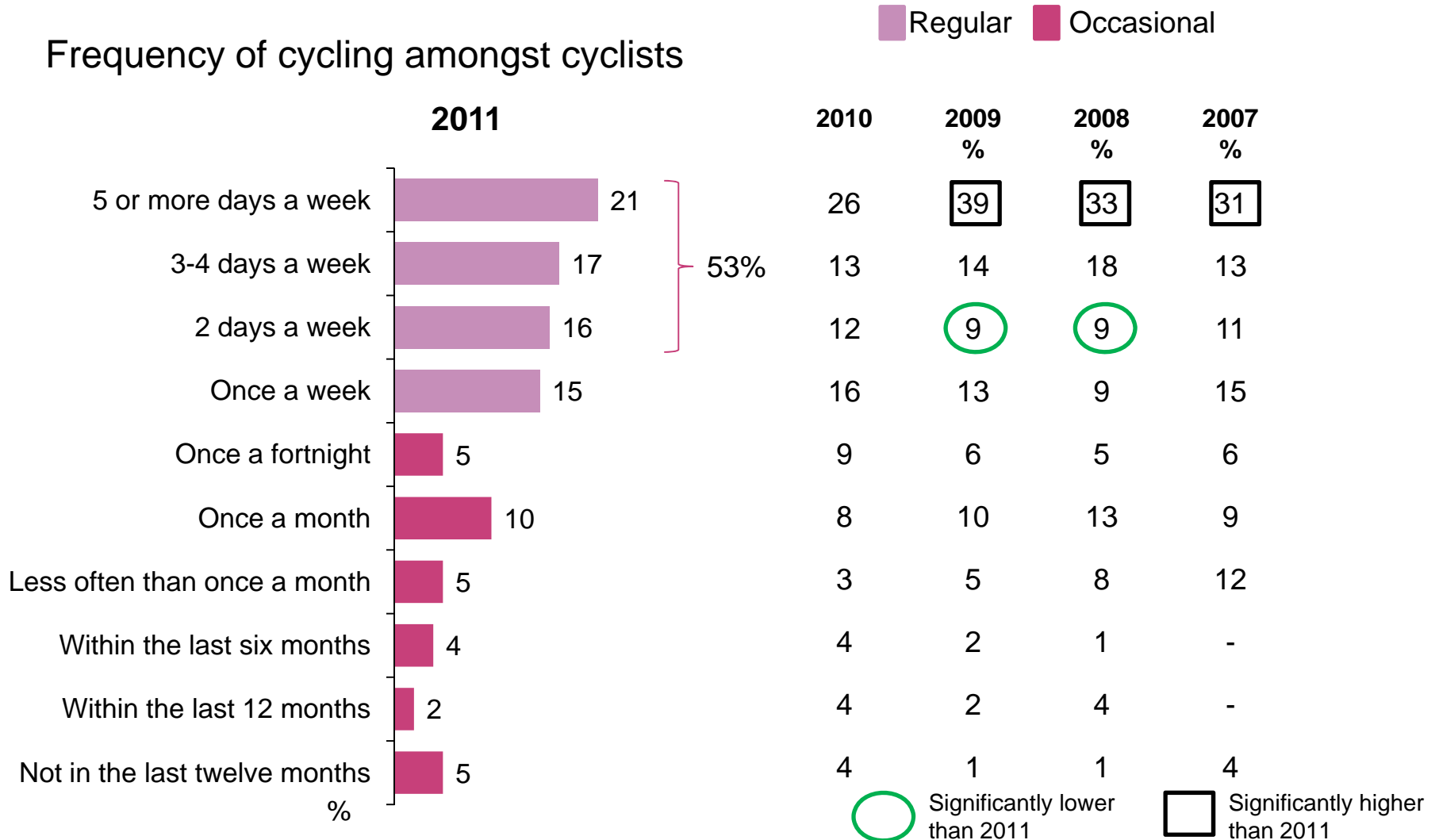
Demographic questions

Base: All – Regular cyclists (115), Occasional cyclists (61), Non-cyclists (890)



Amongst cyclists, one in five cycles five or more days a week.

Frequency of cycling amongst cyclists



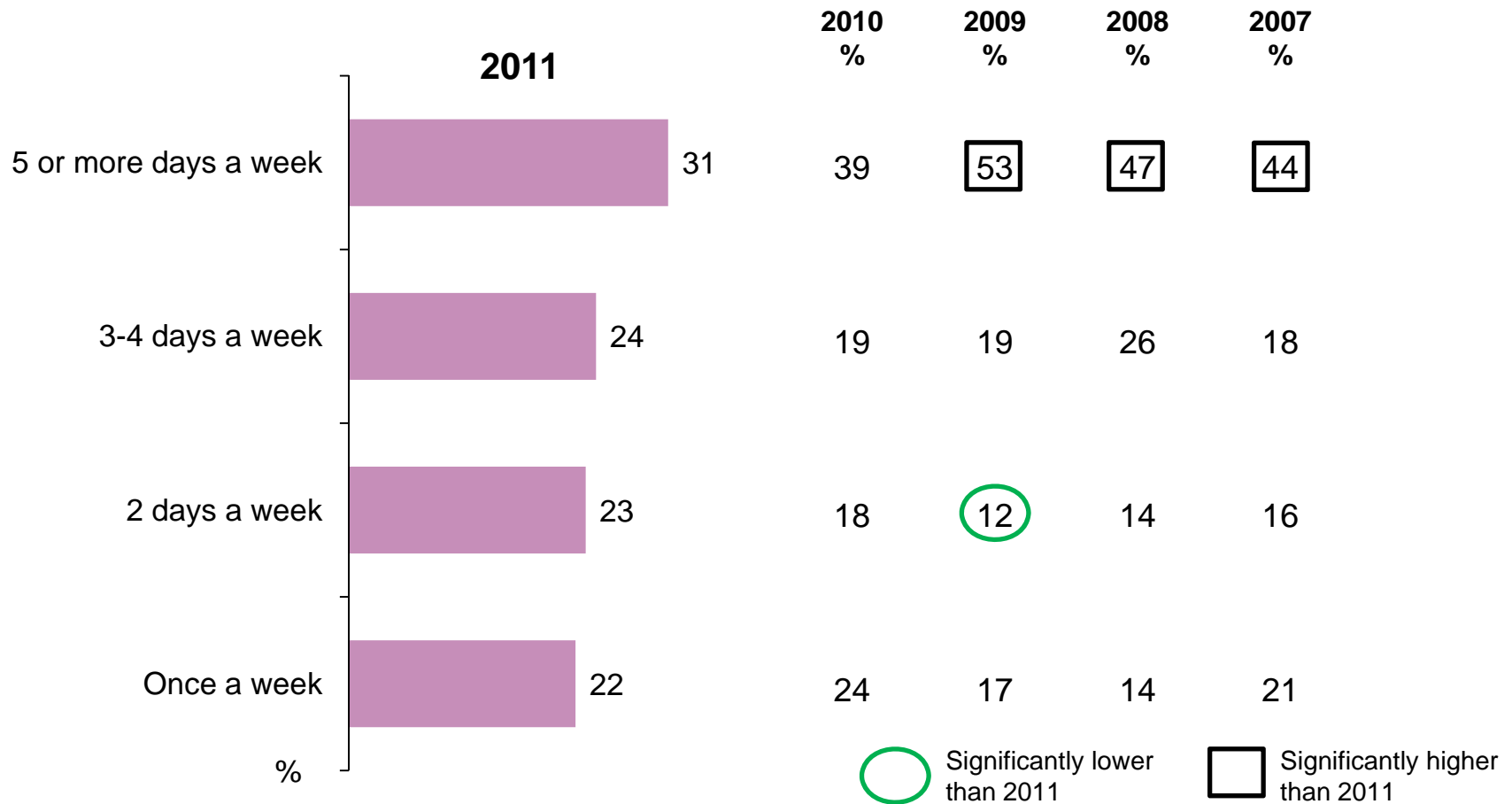
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

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



The proportion of regular cyclists to cycle at least five days a week is consistent with this time last year, but lower than the three previous waves

Frequency of cycling amongst regular cyclists (trend)



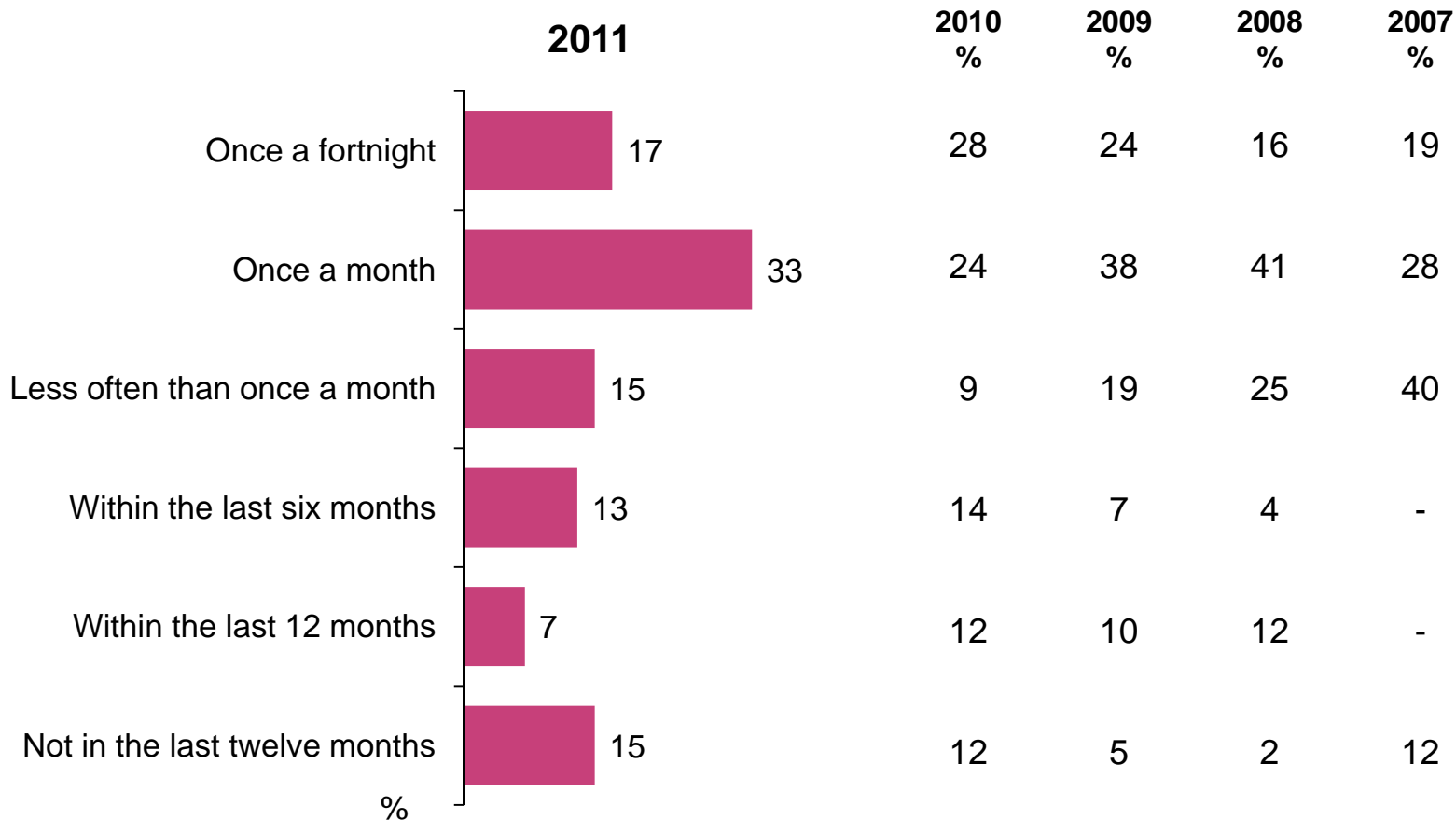
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

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



There is no significant difference in cycling frequency amongst occasional cyclists compared with previous waves

Frequency of cycling amongst occasional cyclists (trend)



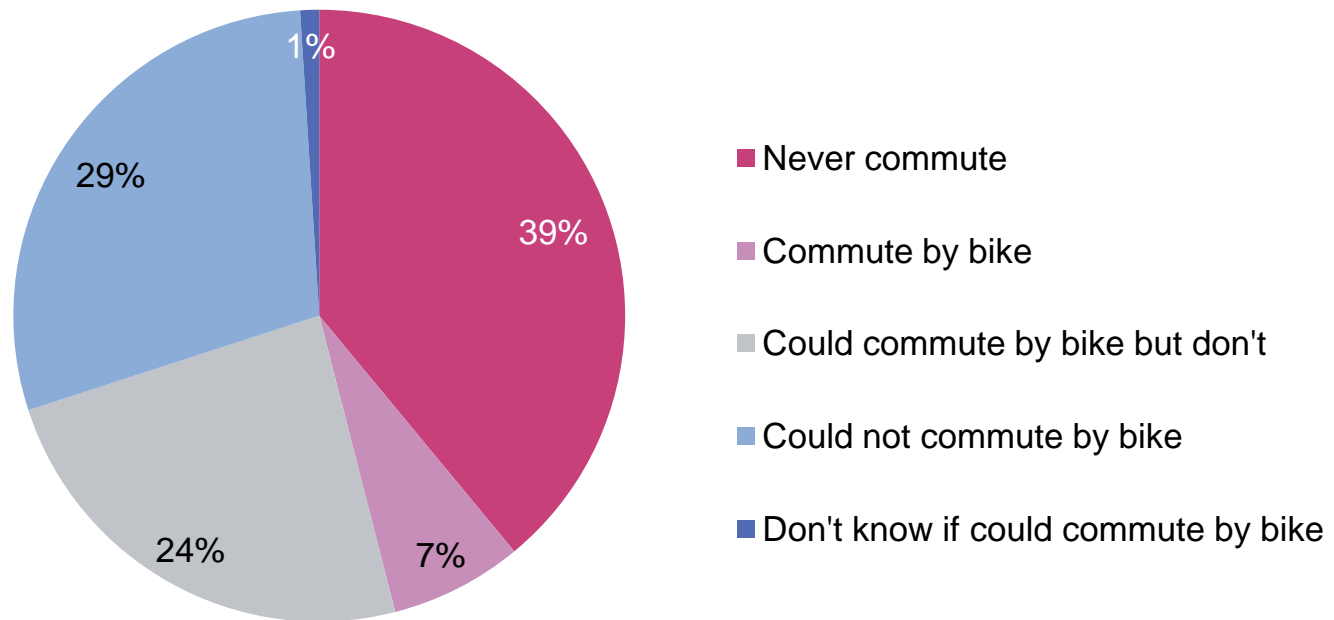
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?
Base: Occasional cyclists – 2011 (61), 2010 (49), 2009 (42), 2008 (49), 2007 (57)

Caution low base sizes



A quarter of Londoners (24%) could commute by bike but do not currently

Propensity to commute by bike



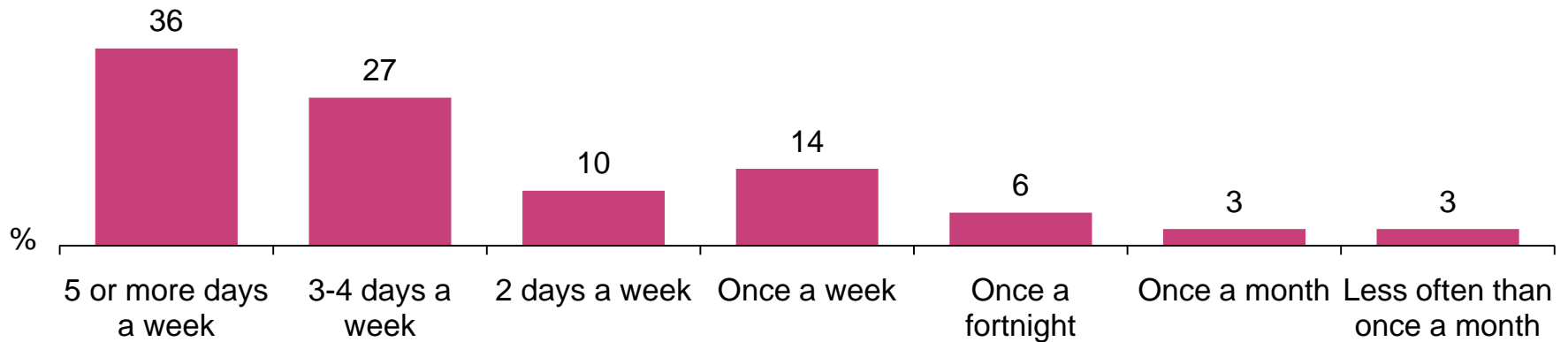
QCHS2: Do you ever commute in London, by which I mean travelling to work, school, college or university? CHS2a: Which types of transport do you use to do this? CHS2c: Could you cycle to work, school, college or university?

Base: all (1,066)



Of those commuting by bike, just over a third do so five or more days a week

Frequency of commuting by bike



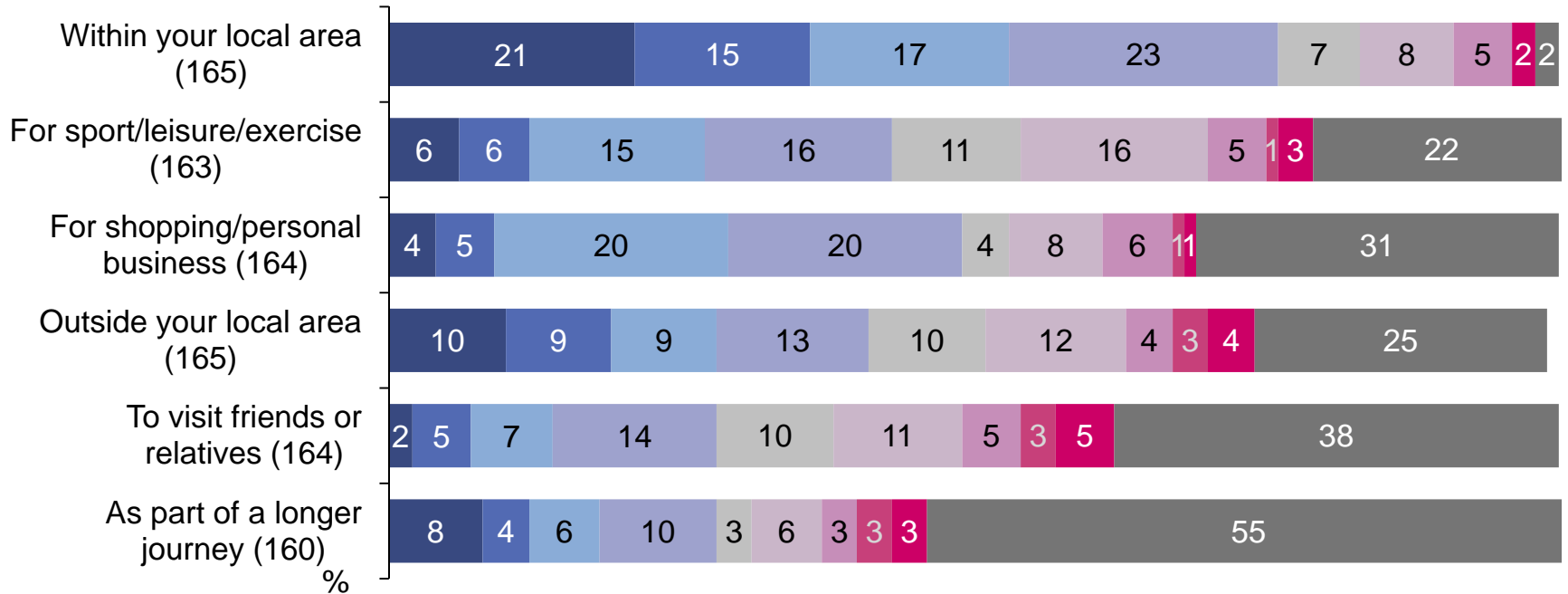
Caution low base sizes

QCHS2b: Typically, how often do you cycle as a means of commuting in London?
Base: Those commuting by bike (58)



Cyclists cycle most frequently within their local area

Frequency of travelling by bike by journey purposes

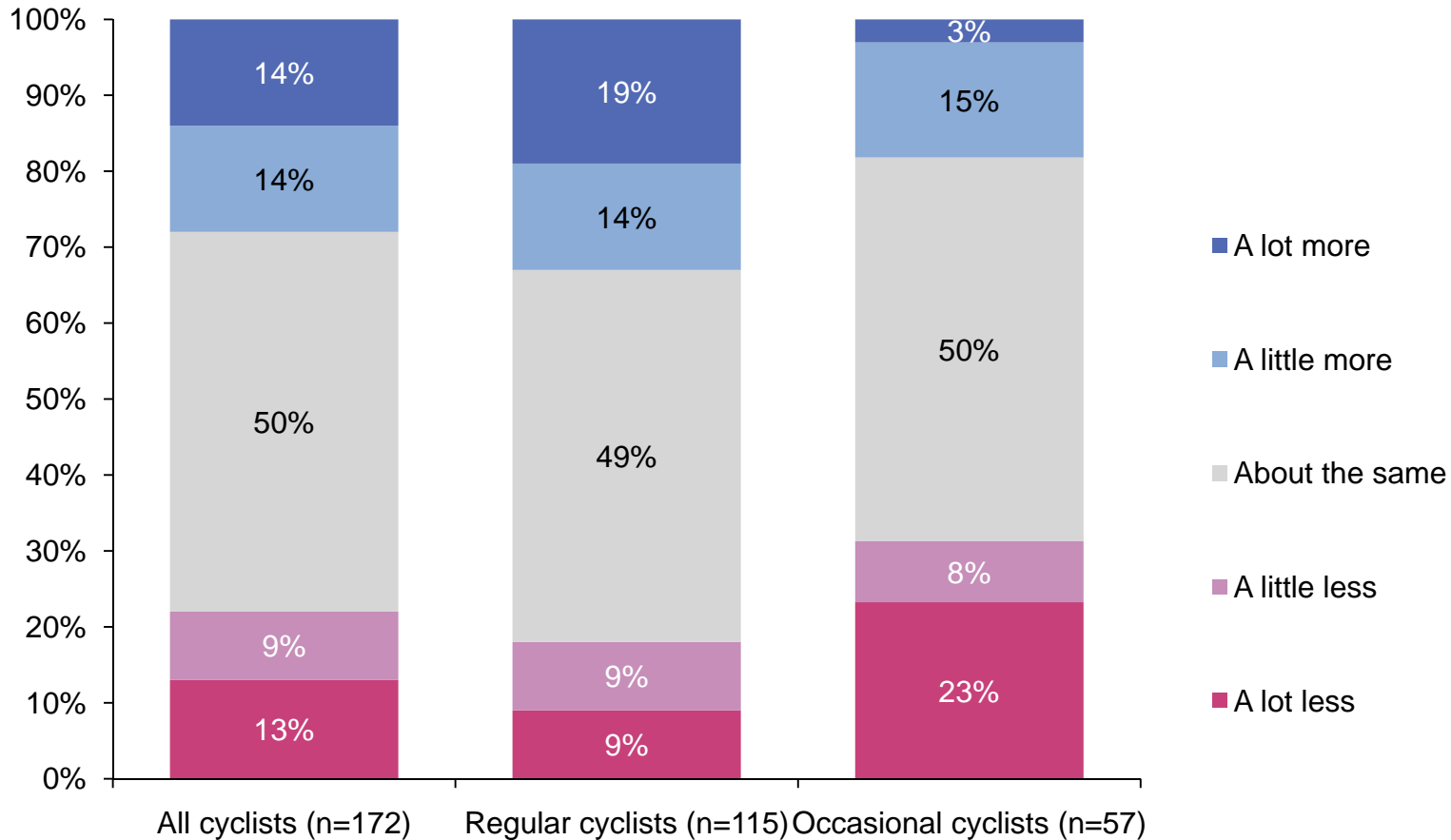


- 5 or more days a week
- 3-4 days a week
- 2 days a week
- Once a week
- Once a fortnight
- Once a month
- Less often than once a month
- Within the last 6 months
- Within the last 12 months
- Never/not within the last 12 months

QC5a/b/c/f/C5f3/C5f3: How often do you cycle...?

Base: All cyclists (excluding those who have not cycled in the last 12 months, and excluding Don't know – numbers in brackets in chart)

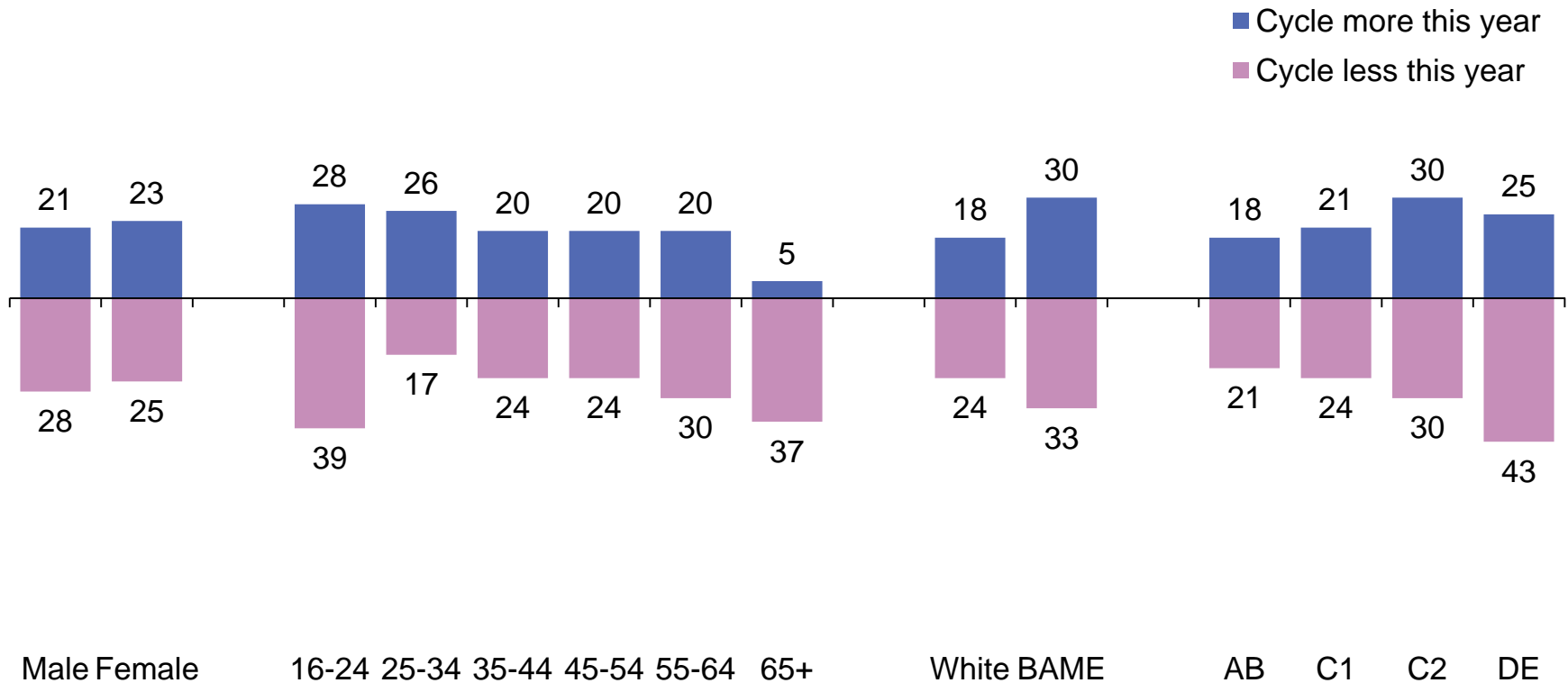
Regular cyclists are more likely to have increased the amount they cycle than occasional cyclists



QC9: Compared to this time last year, would you say you have cycled ...?

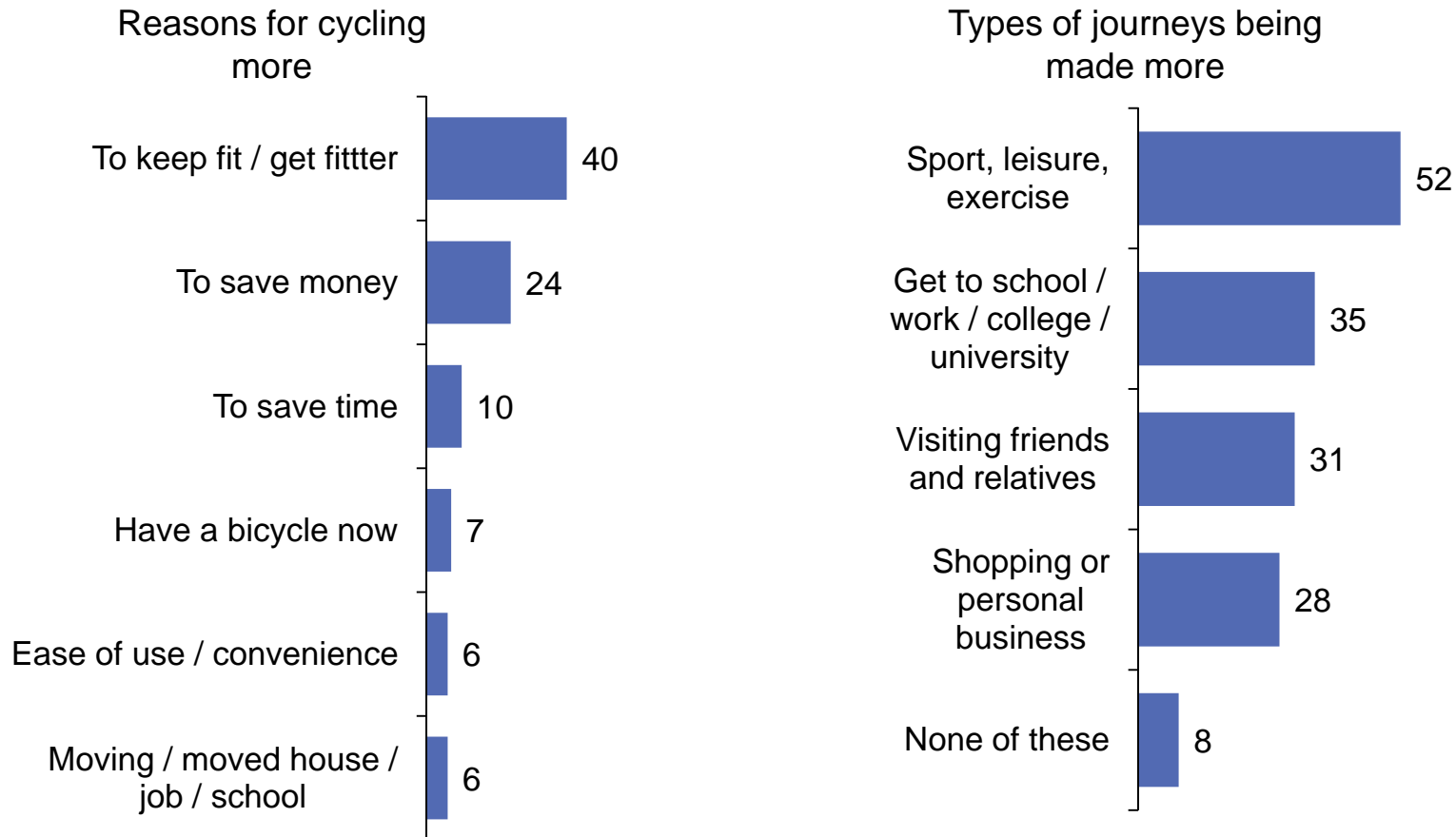
Base: All cyclists (numbers in brackets in chart)

The greatest churn is shown amongst young people and BAME Londoners; older people are most likely to cycle less this year than last, as are those in DE households



QC9: Compared to this time last year, would you say you have cycled ...?
 Base: All excluding those who did not cycle this year or last (446)

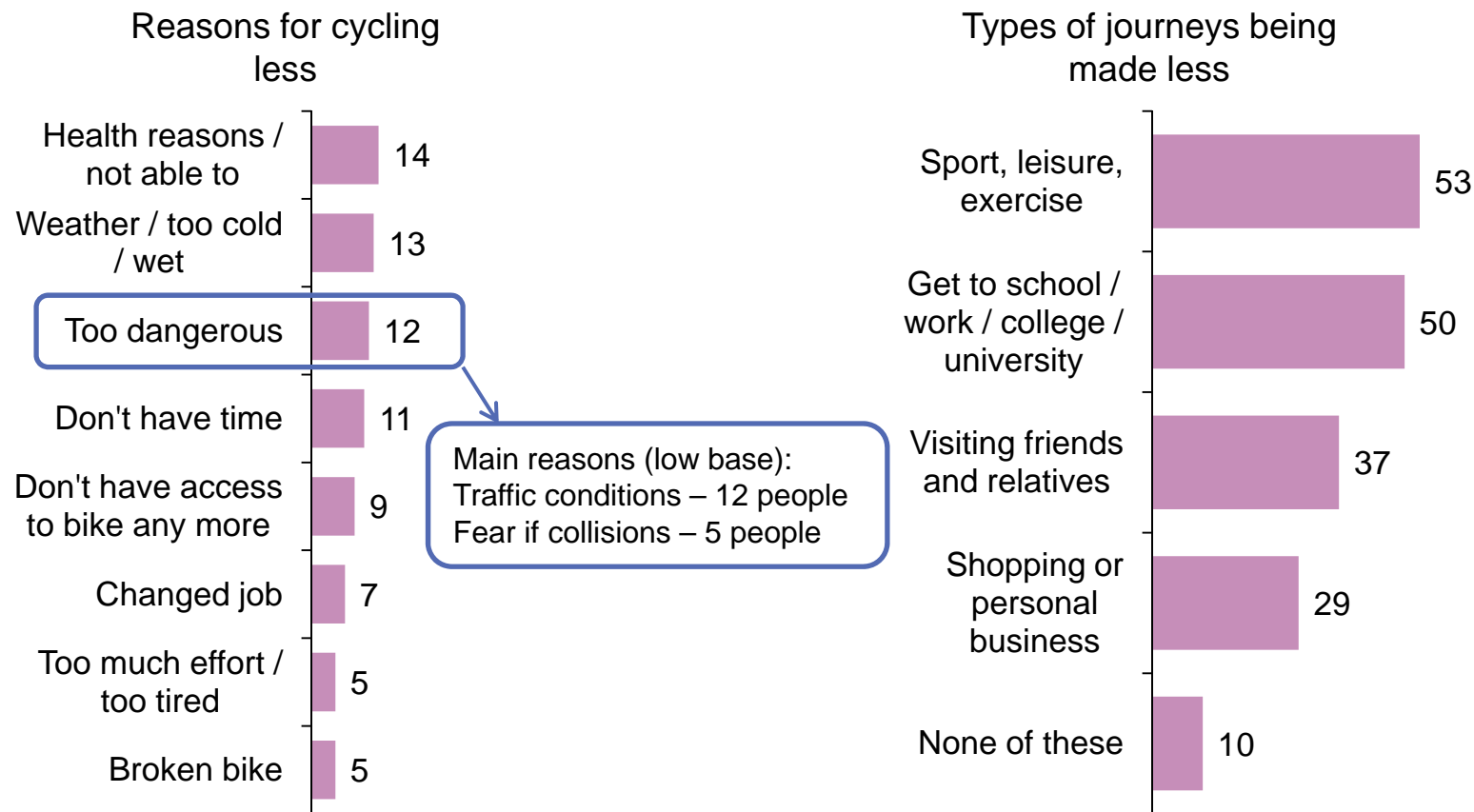
The most common reason given for cycling more this year is fitness; correspondingly around half are making extra trips for sport or leisure



QC10a /b : Why are you cycling more this year? / What sort of trips having you been making more by bike this year compared with this time last year?

Base: All making more trips (94)

Those who are cycling less this year give a variety of reasons; the types of journeys being made less compare with those being made more



QC11a /aa/b : Why are you cycling less this year? / Why do you feel that cycling is dangerous? / What sort of trips having you been making less by bike this year compared with this time last year? Base: All making fewer trips (122) / all thinking cycling dangerous (16)

BEHAVIOUR CHANGE



Behaviour change model

The behaviour change model categorises cyclists and non-cyclists into broad behavioural groupings. It has been used by TfL in this format since 2010, before which a similar but incompatible model was used with substantially different question wording.

Cyclists are presented with a number of statements regarding the possibility of cycling more (such as “thinking about doing this”) and must choose the one which most applies to them.

Non-cyclists are presented with the same statements but are asked to respond in relation to the possibility of taking up cycling.

The behavioural groupings are based on responses to these statements, a full list of which is found on the next slide.

The statements (which are shown on the next slide) do not represent a linear progression, and Londoners may move between any of the groups over time.

Behaviour change model – definitions

	Grouping	Proportion of cyclists (in last twelve months)	Proportion of non- cyclists (including 'not in the last 12 months)
You don't want to or would not consider doing this	Pre-primed	5%	26%
You have never thought about doing this	Pre-primed	2%	8%
You have given it some thought but are not going to do it	Pre-primed	10%	26%
You are thinking about doing this	Primed	16%	15%
You have decided to do this (you have just decided but not yet started to do anything about it)	Primed	8%	5%
You are setting things in place and / or are seeking more information about this	Preparation	4%	1%
You have started doing this but are finding it difficult	Change	3%	3%
You have started doing this and are finding it easy	Change	6%	1%
You are already doing this and will continue to do so	Normalised	39%	4%
You were doing this but couldn't stick to it	Primed	7%	7%

Attitudes towards cycling more

Current cyclists are most likely to be 'normalised', meaning they are already 'cycling more, and will continue to do so' (39%).

31% are primed meaning they are 'thinking about cycling more', 'have decided to cycle more' or 'were cycling more but couldn't stick to it'. These figures have remained steady over the past four waves of research.

Most non-cyclists (61%) are 'pre-primed' meaning they 'would not consider taking up cycling', 'have never thought about taking up cycling' or 'have given taking up cycling some thought but are not going to do so'. This has remained constant over the last four waves of research.

A quarter (27%) are 'primed' to take up cycling (meaning they are 'thinking about it', 'have decided to do it' or 'were doing this but couldn't stick to it').

Motivations and impact of cycling more

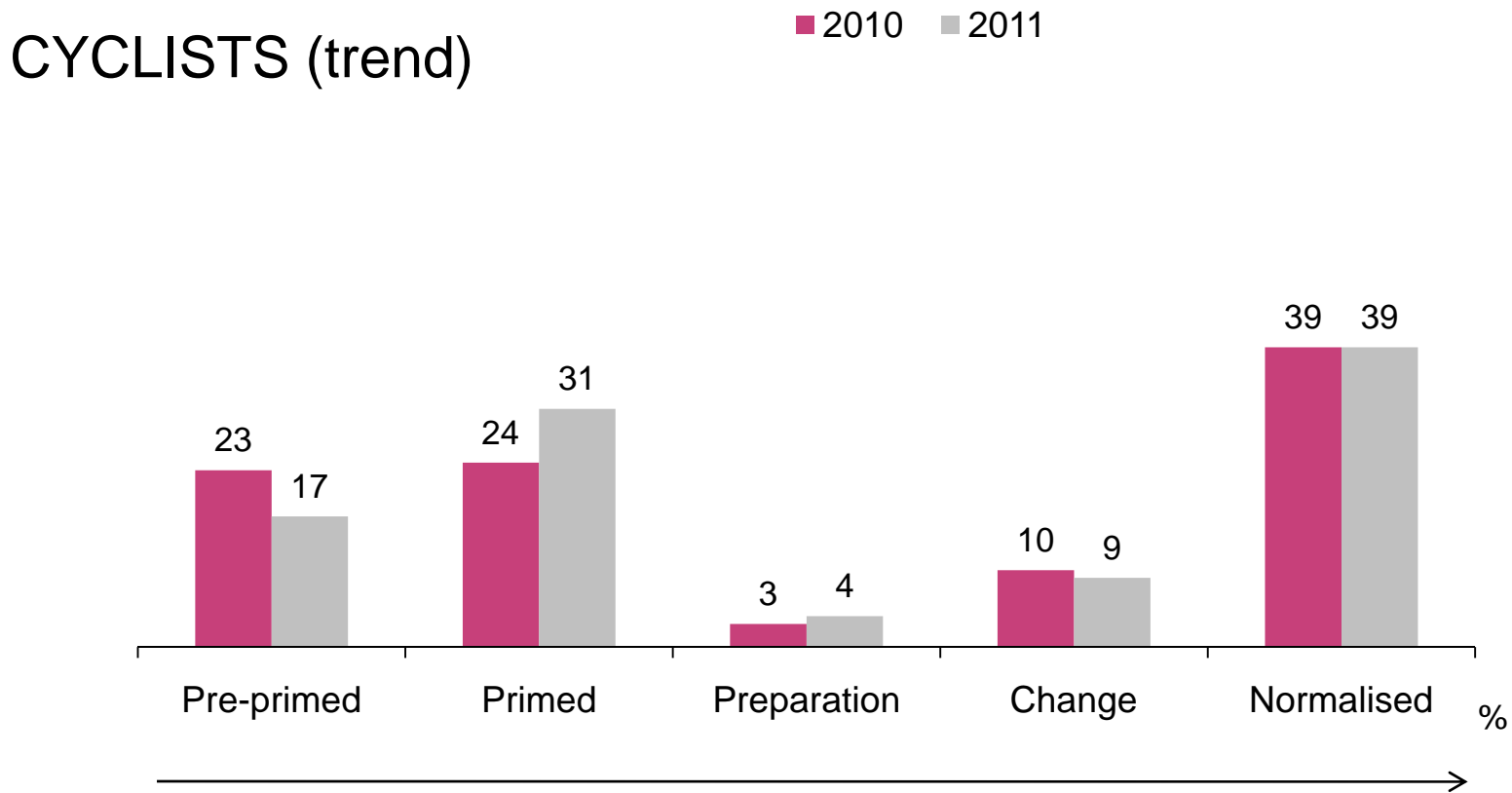
For both cyclists and non-cyclists, the main motivators and barriers to cycling more/taking up cycling are the same. The main motivator is increased fitness. The desire to save money and time are also reasons commonly mentioned.

Safety concerns are most likely to be cited as a deterrent to increasing/taking up cycling.

For both cyclists and non-cyclists, if they were to cycle more/take up cycling, bus and car are the modes that cycling would most likely replace. Just 1% of cyclists, and 2% of non-cyclists, said they would be making extra trips if they increased their cycling.



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



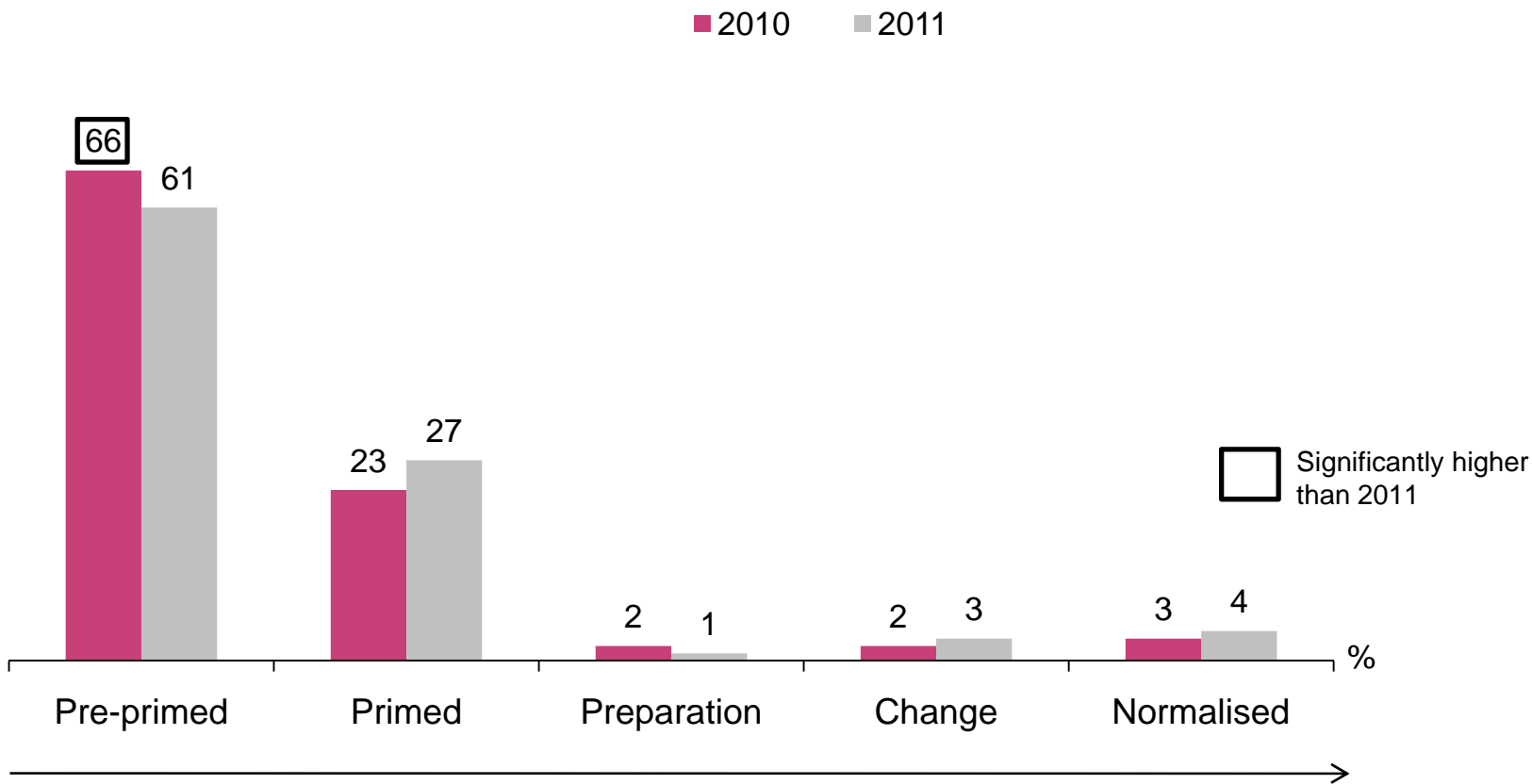
QCYCMOR1: Thinking about the possibility of "cycling more", which of these descriptions would you say MOST applies to you?

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



The majority of non-cyclists are 'pre-primed' meaning they have decided against taking up cycling, have never thought of it, or have given it some thought but are not going to do it

NON-CYCLISTS (trend)



QTAKEUP1: Thinking about the possibility of "taking up cycling", which of these descriptions would you say MOST applies to you?

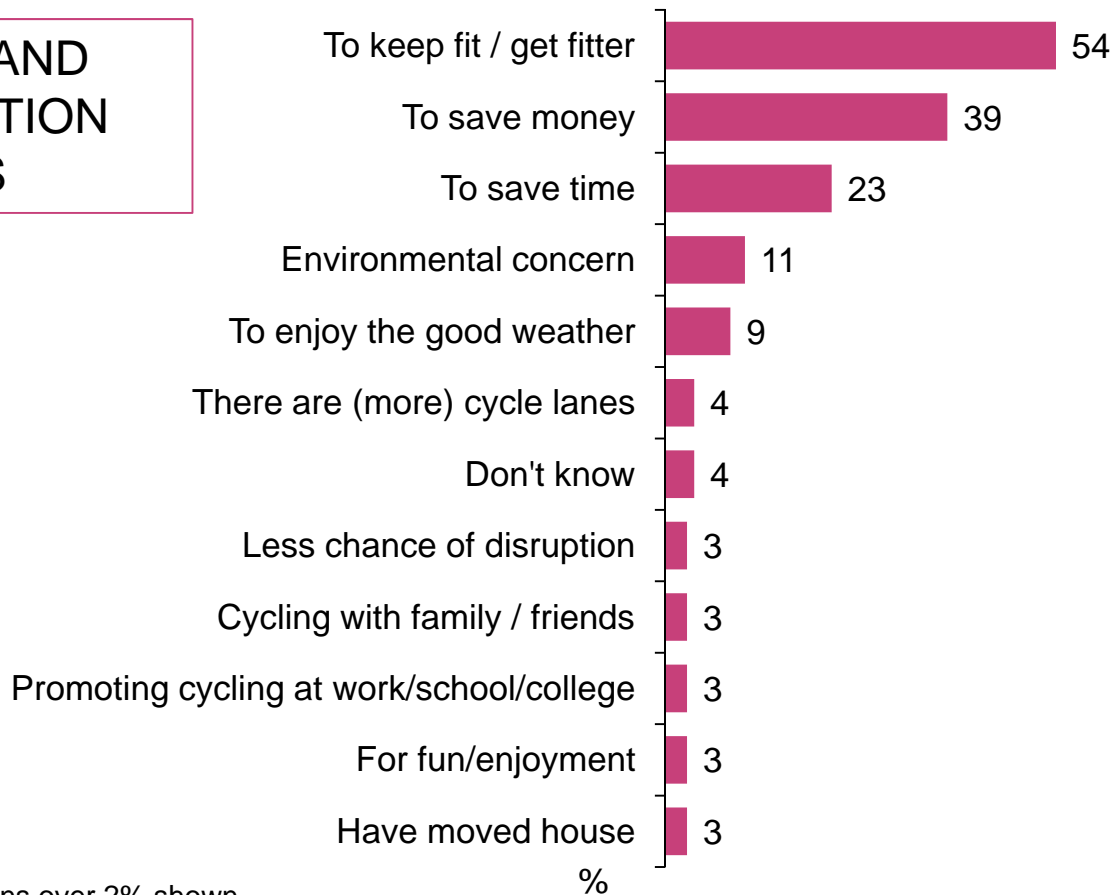
Base: Non-cyclists and those who have cycled around London but not in the last 12 months, 2011 (899), 2010 (859)



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

Motivations for cycling more

PRIMED* AND PREPARATION CYCLISTS



Mentions over 2% shown

%

Caution low base sizes

QC7b: What is making you actively consider cycling more in London?

Base: Those "thinking about...decided to...are setting things in place to..." cycle more (49)

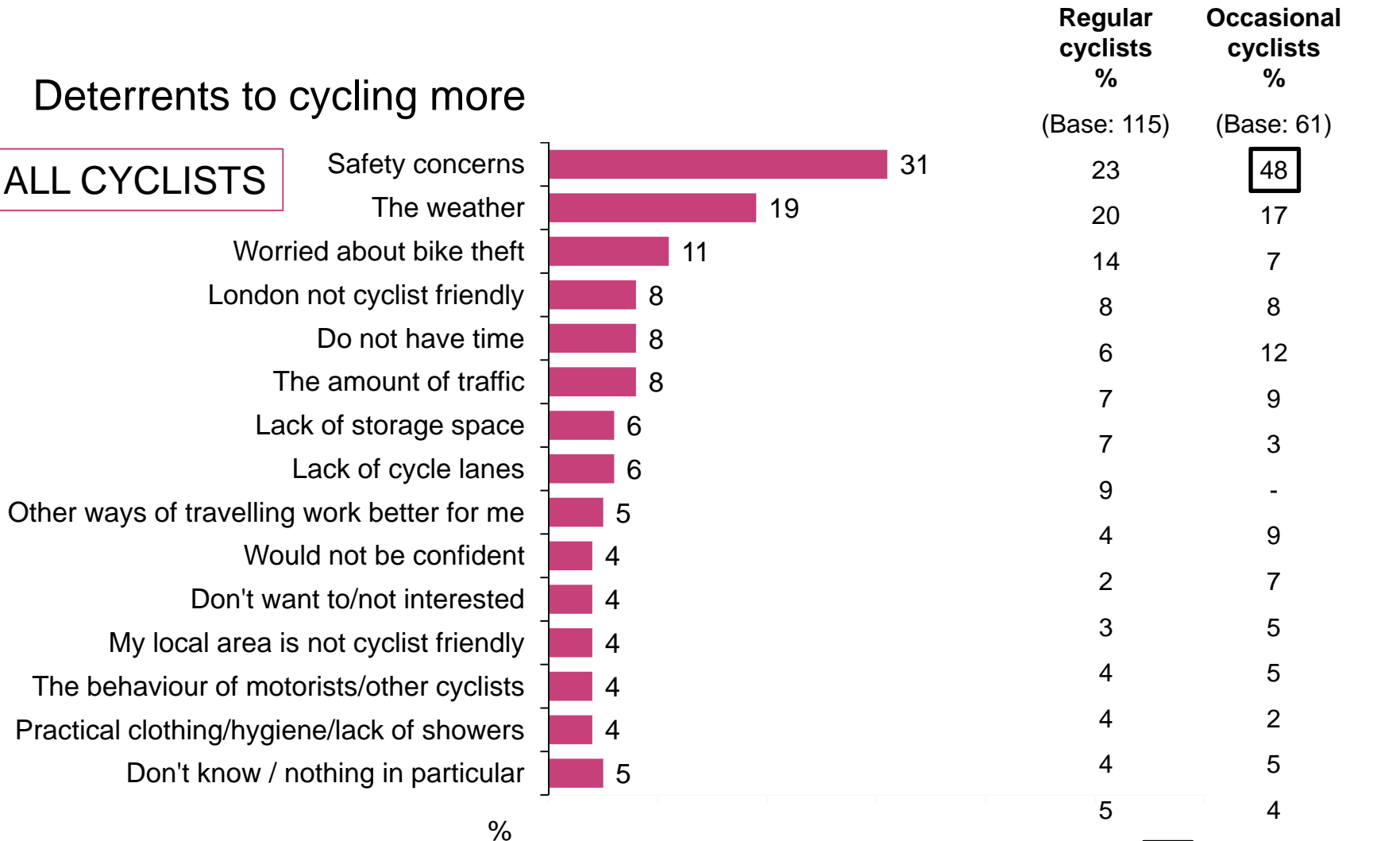
* Includes 'primed' individuals except those who 'were doing this but couldn't stick to it' at QCYCMOR1



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

Deterrents to cycling more

ALL CYCLISTS



Mentions over 3% shown

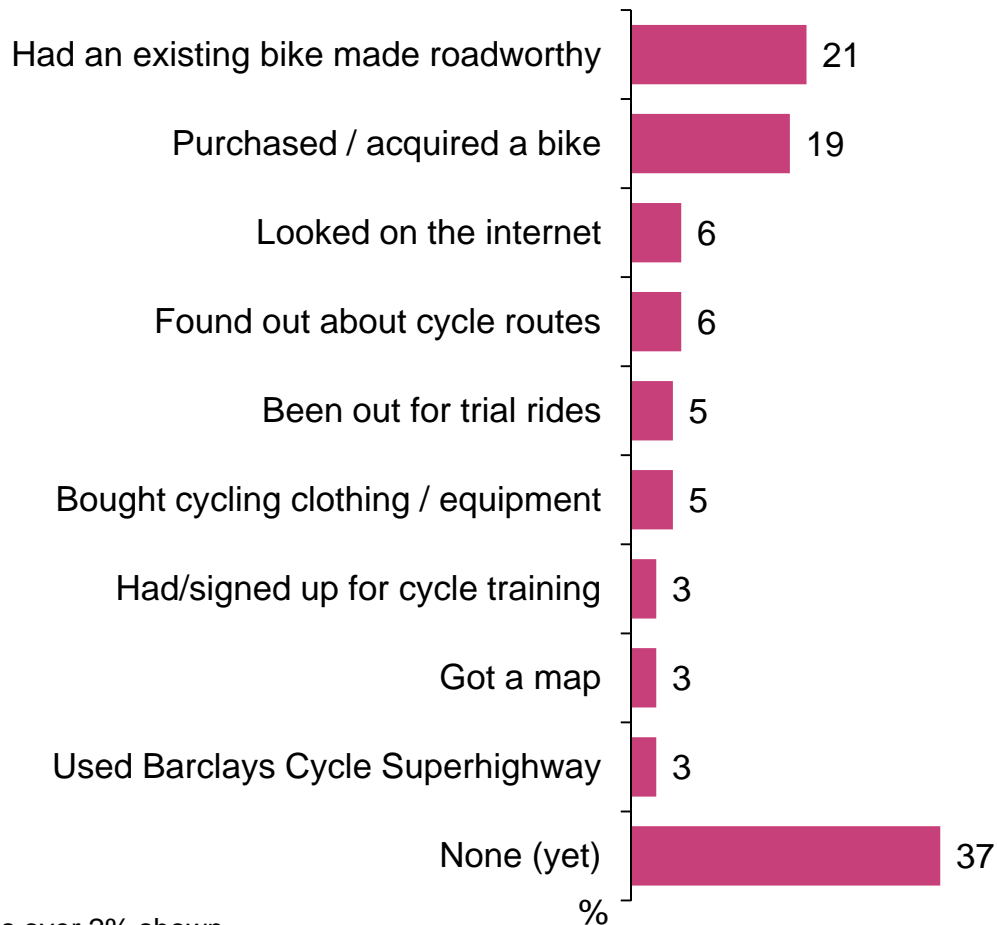
48 Significantly higher than 2011 total

QC3g: What deters you from cycling more?
Base: All cyclists (176)



Cyclists have taken a range of steps towards cycling more

Steps taken towards cycling more



PRIMED* AND PREPARATION CYCLISTS

NB: all mentions of Barclays Cycle Superhighway account for 4% (including those not shown in chart)

All mentions of Barclays Cycle Hire account for 1%

Mentions over 2% shown

Caution low base sizes

QC7aaa: What practical steps have you taken towards cycling more in the next 12 months?

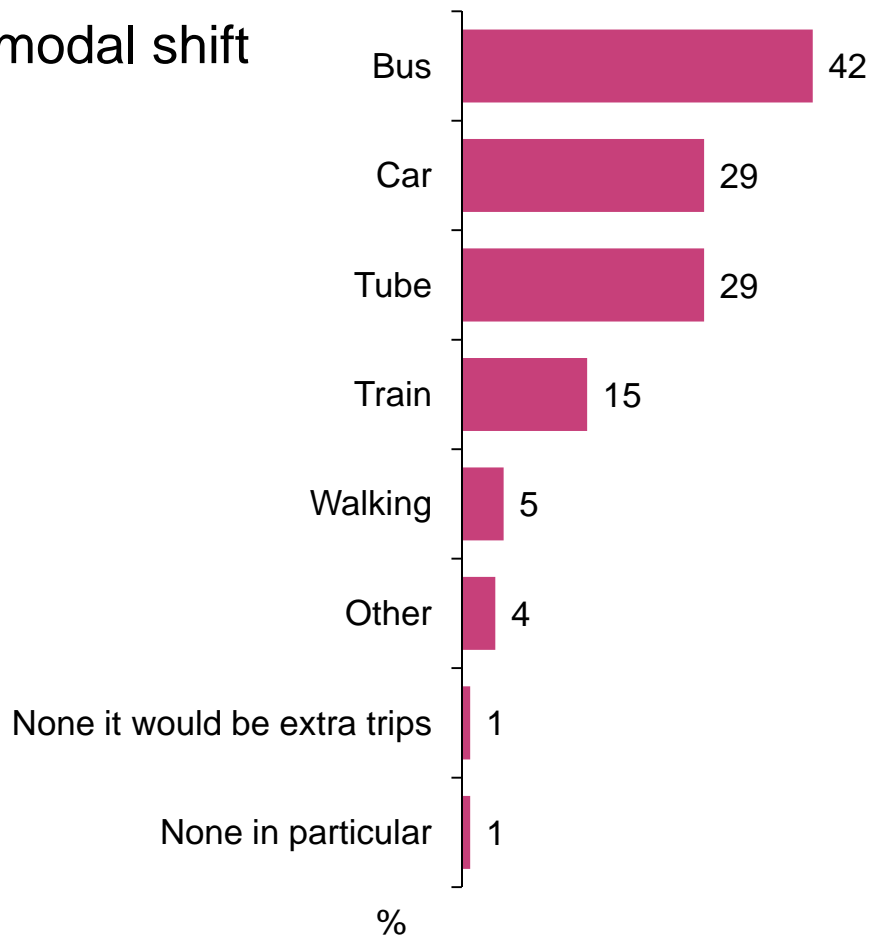
Base: Those "thinking about...decided to...are setting things in place to..." cycle more (49)

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



If cyclists were to cycle more, two-fifths would use the bus less, and 29% the car/Tube

Potential modal shift



PRIMED* AND PREPARATION CYCLISTS

Caution low base sizes

QC8: What type of transport, if any, would you use less if you cycled more?

Base: Those "thinking about...decided to...are setting things in place to..." cycle more (49)

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



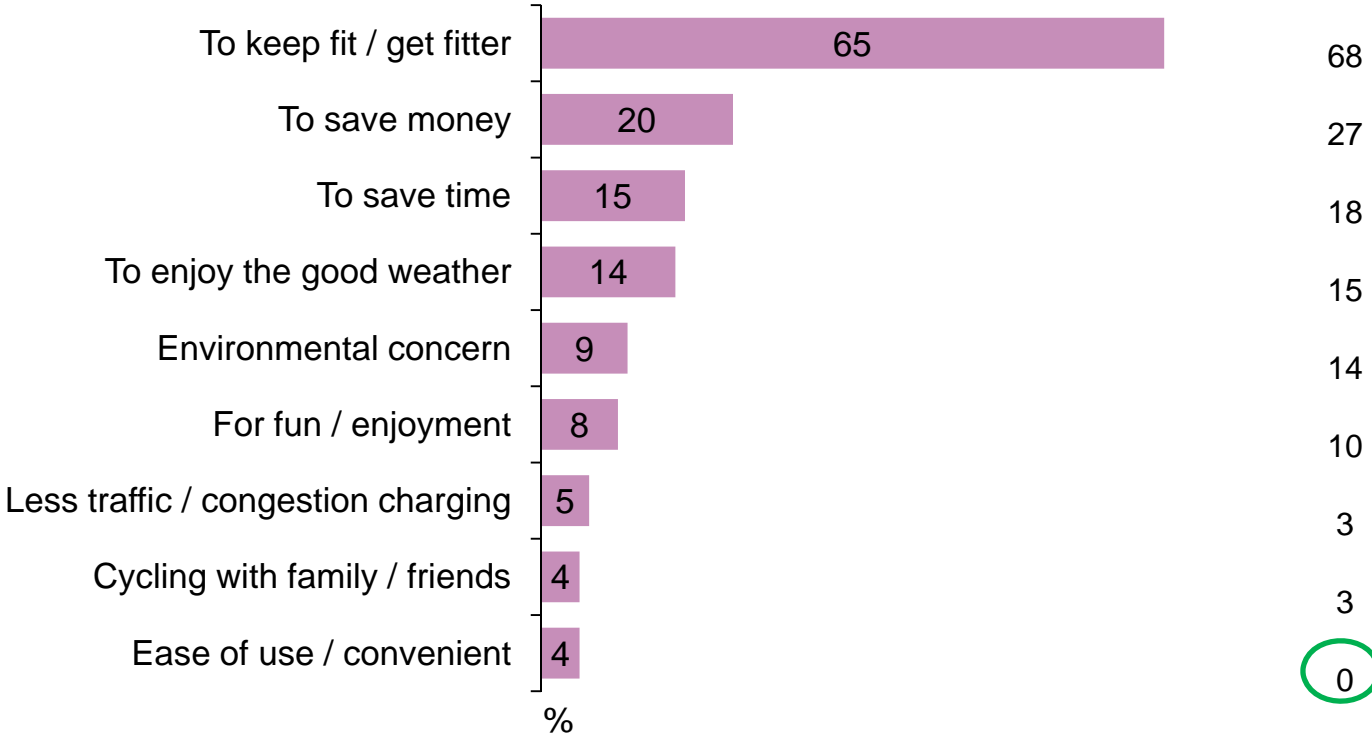
Getting fit remains the strongest motivator for non-cyclists

Motivations for taking up cycling

PRIMED* AND PREPARATION
NON-CYCLISTS

2010 %

(Base: 150)



Mentions over 3% shown

Significantly lower than 2011

Significantly higher than 2011

QC3e: Mar11/Oct 2010 - Why are you considering taking up cycling?

June10 and Mar10 - Why do you say that it is likely you will take up cycling in the next 12 months?

Base: Those "thinking about...decided to...are setting things in place to..." take up cycling (175)

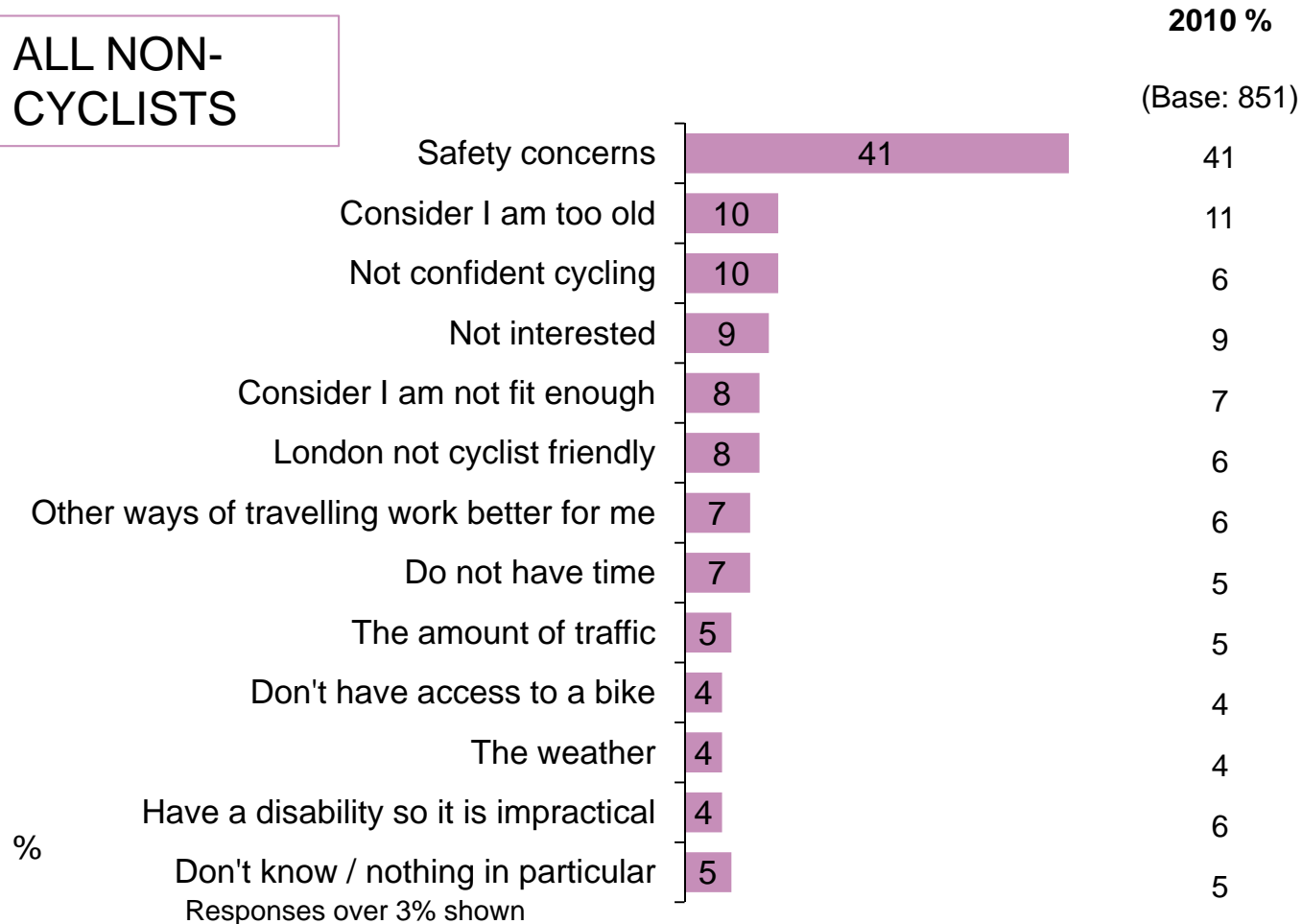
* Includes 'primed' individuals except those who 'were doing this but couldn't stick to it' at QTAKEUP1



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

Deterrents to taking up cycling

ALL NON-CYCLISTS



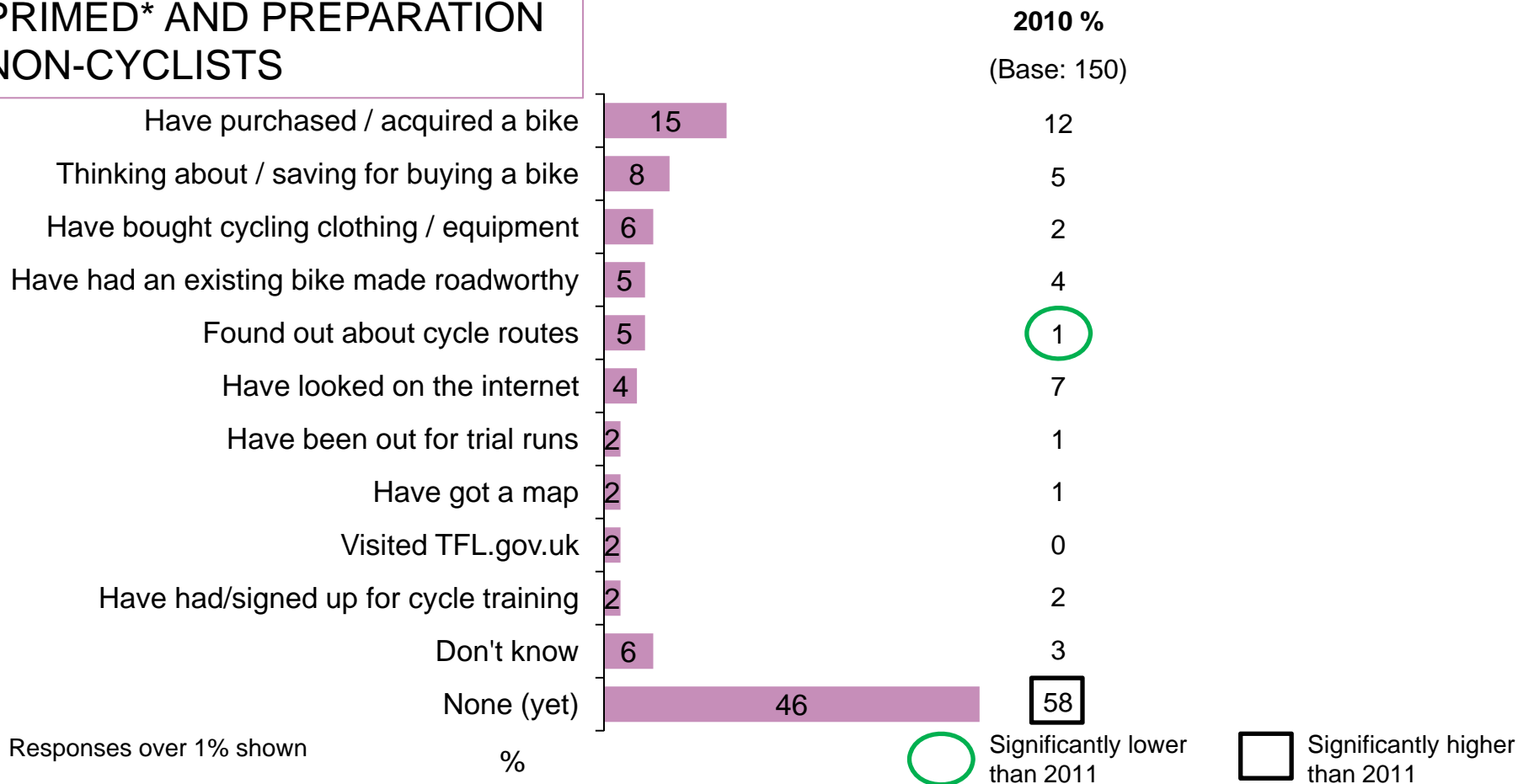
QC3g: What deters you from taking up cycling?
Base: Non-cyclists (890)



There has been a fall in the proportion of primed and preparation non-cyclists who have taken no steps towards taking up cycling, and a slight (non-significant) increase in the proportion who have acquired a bike

Steps taken towards taking up cycling

PRIMED* AND PREPARATION NON-CYCLISTS



QC3d: What practical steps, if any, have you taken towards taking up cycling in the next 12 months?

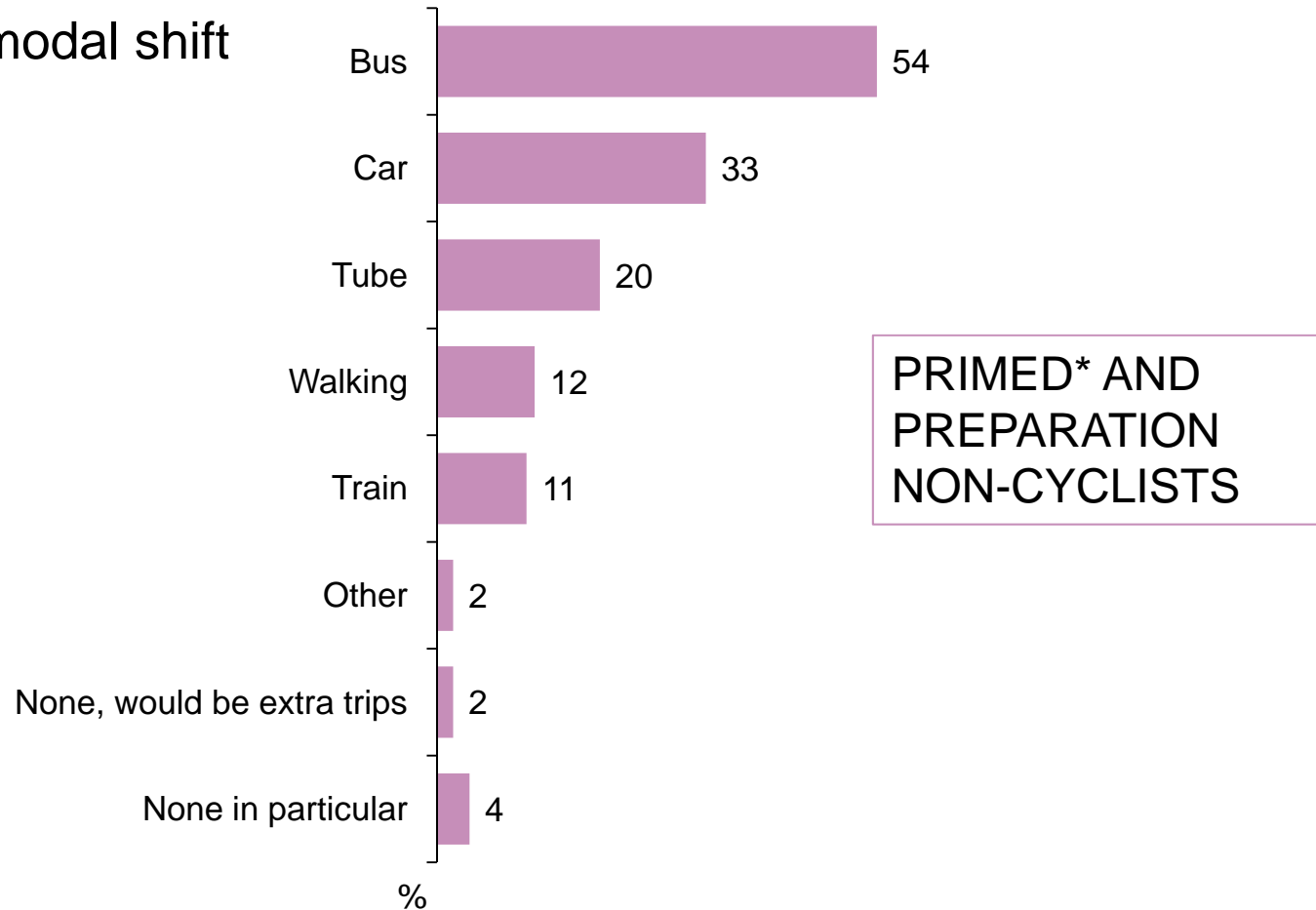
Base: Those "thinking about...decided to...are setting things in place to..." take up cycling (175)

* Includes 'primed' individuals except those who 'were doing this but couldn't stick to it' at QTAKEUP1



Non-cyclists believe they would be most likely to use the bus less if they cycled

Potential modal shift



QC3f: What type of transport, if any, would you use less if you take up cycling?

Base: Those "thinking about...decided to...are setting things in place to..." take up cycling (175)

* Includes 'primed' individuals except those who 'were doing this but couldn't stick to it' at QTAKEUP1

MOTIVATIONS

Motivations

Cycling remains relatively unappealing to many: of the six modes Londoners were asked about, cycling is the least appealing with 46% considering it an appealing mode of transport (39% consider it 'unappealing'). This remains in line with October 2010.

Cyclists are understandably more likely to see cycling as appealing, with 80% stating this compared to 38% of non-cyclists.

Making journeys by bike through one's local area appeals more to both cyclists and non-cyclists than cycling outside one's local area and within central London.

Perceptions

Between 80% and 90% of Londoners state that cycling is becoming more popular, that it is an interesting way to travel, that it is enjoyable, it is a convenient way of getting around, and it is the fastest way to make short journeys.

However concerns about safety remain. 92% feel cyclists are vulnerable to other road users and 90% believe traffic makes people afraid of cycling on the streets of London.

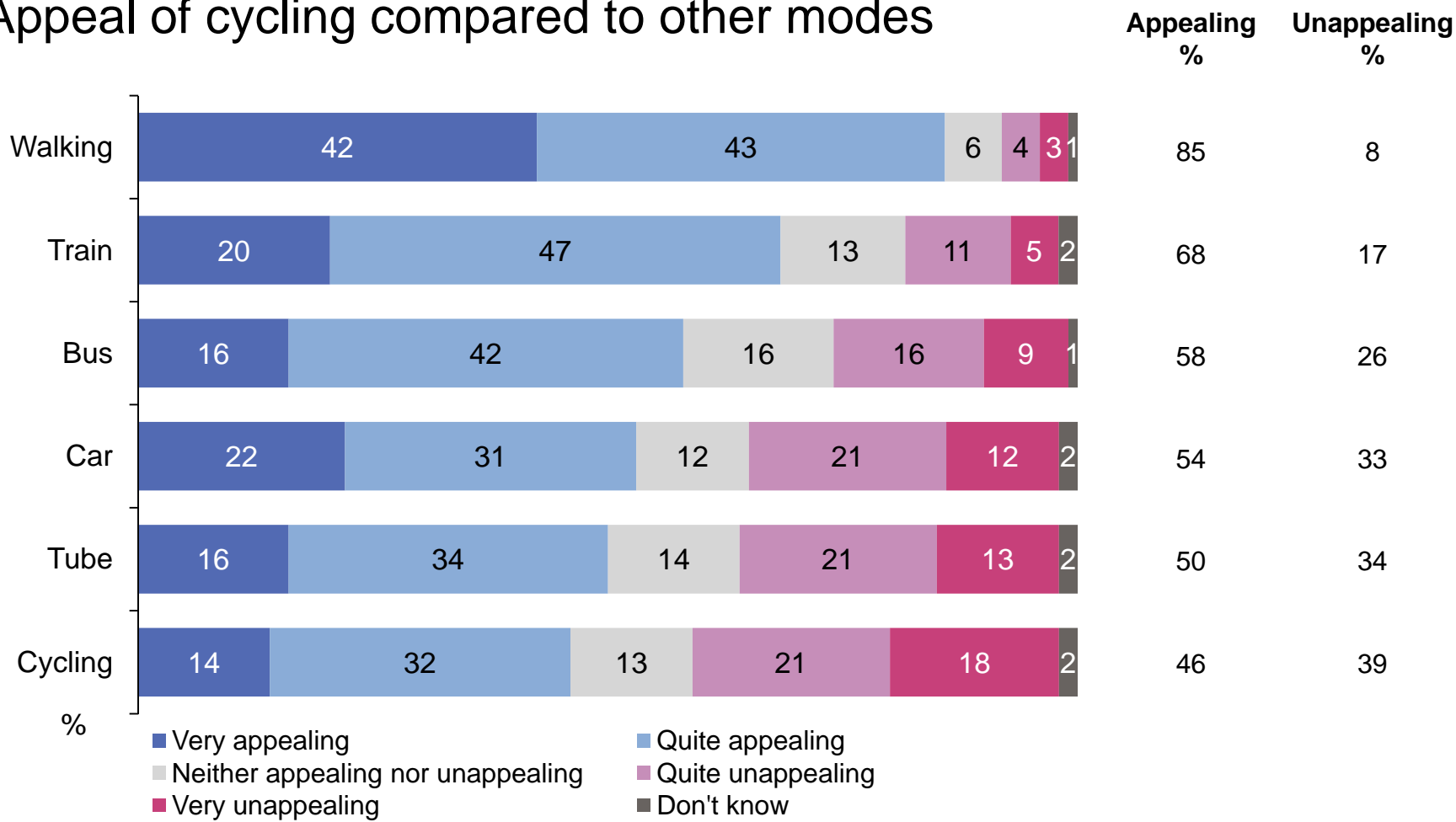
Attitudes towards cyclists have not changed substantially in the last three waves. Presently, 85% of non-cyclists consider cyclists to be fit, and 46% believe cyclists to be dangerous.

Regular cyclists are more likely to feel confident cycling on London's roads than occasional cyclists. 83% of regular cyclists feel confident this wave compared to 74% in October 2010.



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

Appeal of cycling compared to other modes



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

Base: all (1,066)

There has been no change in Londoners' perceptions of the appeal of cycling compared with last year

Appeal of cycling compared to other modes

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

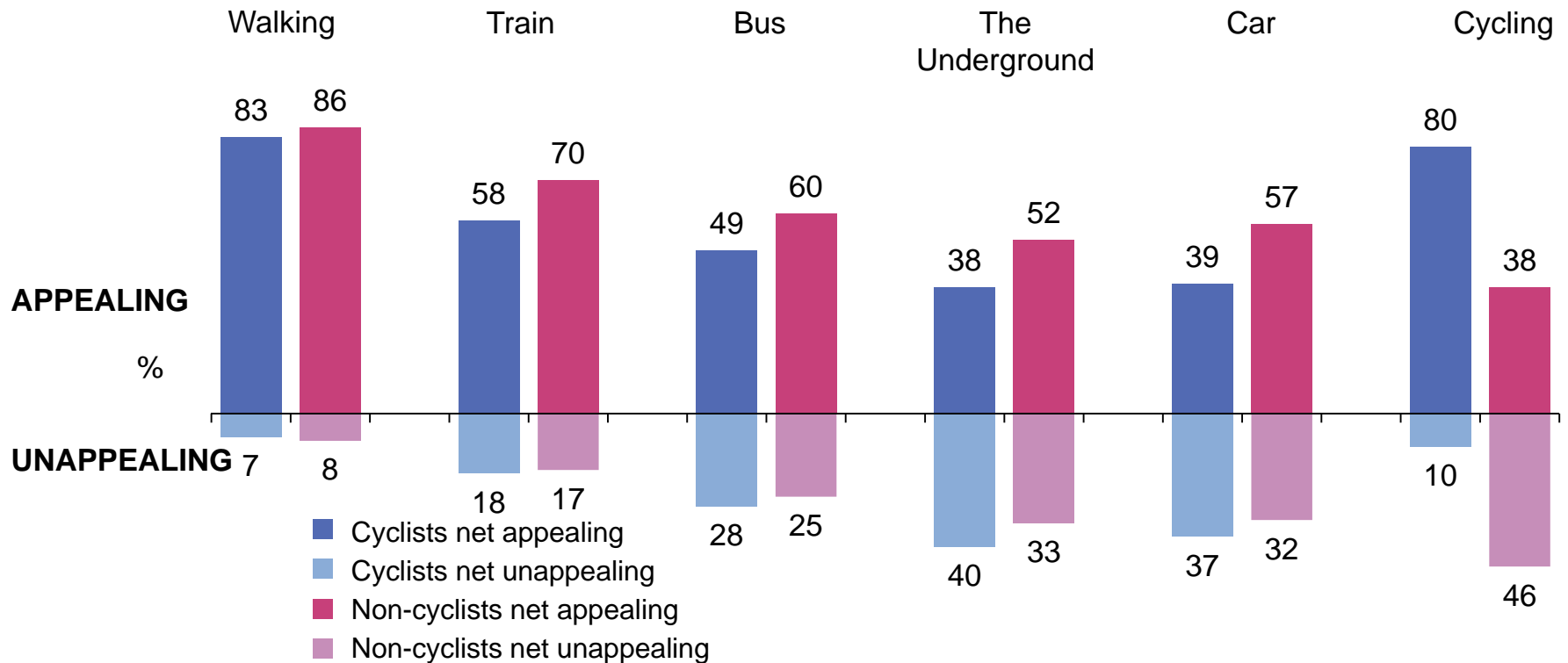
QC3: For each means of travel that I read out, I would like you to tell me how appealing or unappealing you find it. So firstly what about travelling by XXX? Would you say that is?

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



As in October 2010, 38% of non-cyclists find cycling appealing

Appeal of cycling compared to other modes
Cyclist and non-cyclists



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

Base: all cyclists (176), all non-cyclists (890)

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

Appeal AMONG CYCLISTS of different modes of transport

	Appealing		Unappealing	
	2011	2010	2011	2010
Walking	83%	84%	7%	7%
Train	58%	54%	18%	19%
Bus	49%	48%	28%	33%
Car	39%	38%	37%	43%
Tube	38%	40%	40%	46%
Cycling	80%	76%	10%	12%

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

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

For non-cyclists, bus, train and Tube have become more appealing; no change in the appeal of cycling

Appeal AMONG NON-CYCLISTS different modes of transport

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

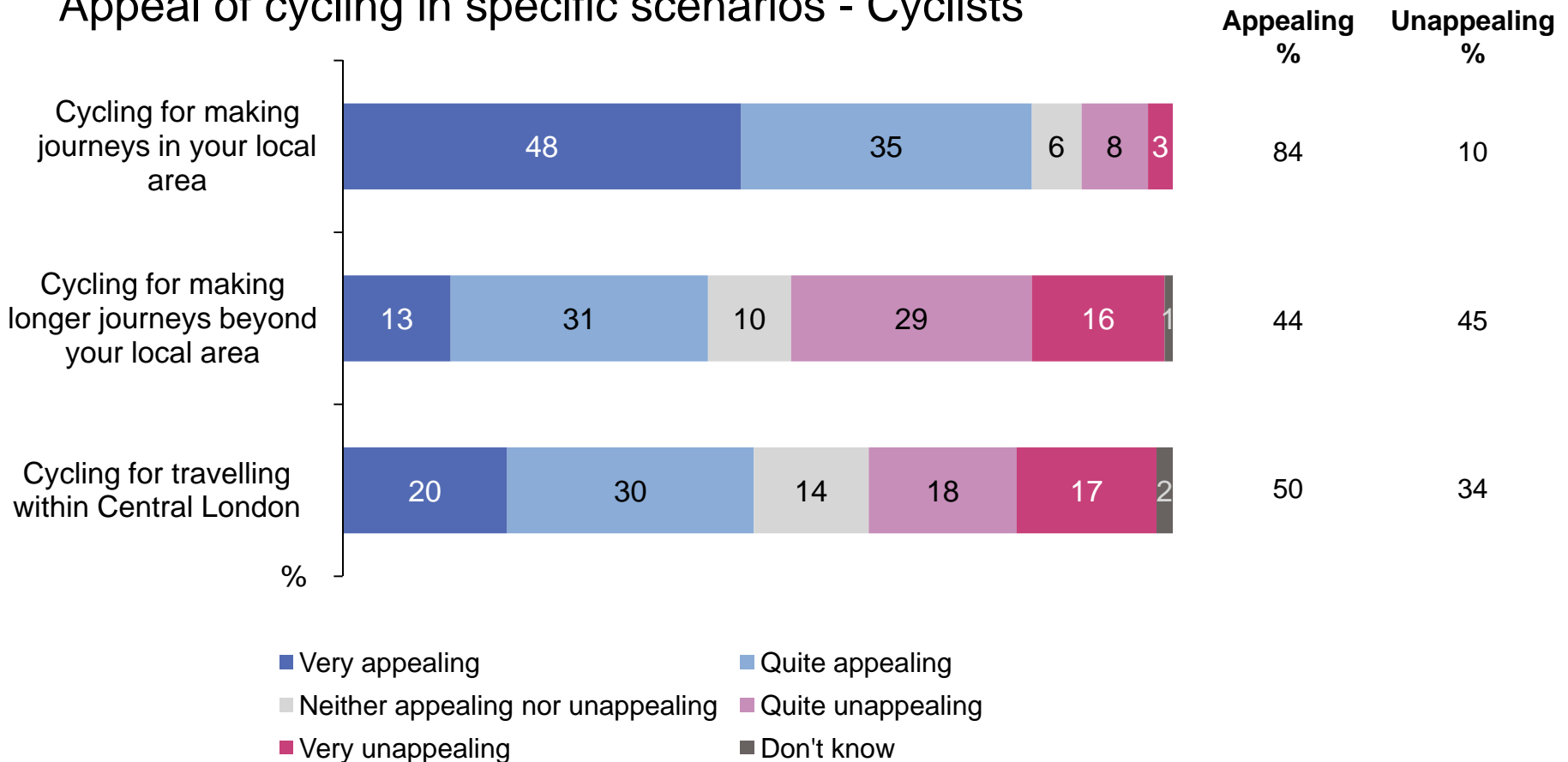
QC3: For each means of travel that I read out, I would like you to tell me how appealing or unappealing you find it. So firstly what about travelling by XXX? Would you say that is?

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



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

Appeal of cycling in specific scenarios - Cyclists



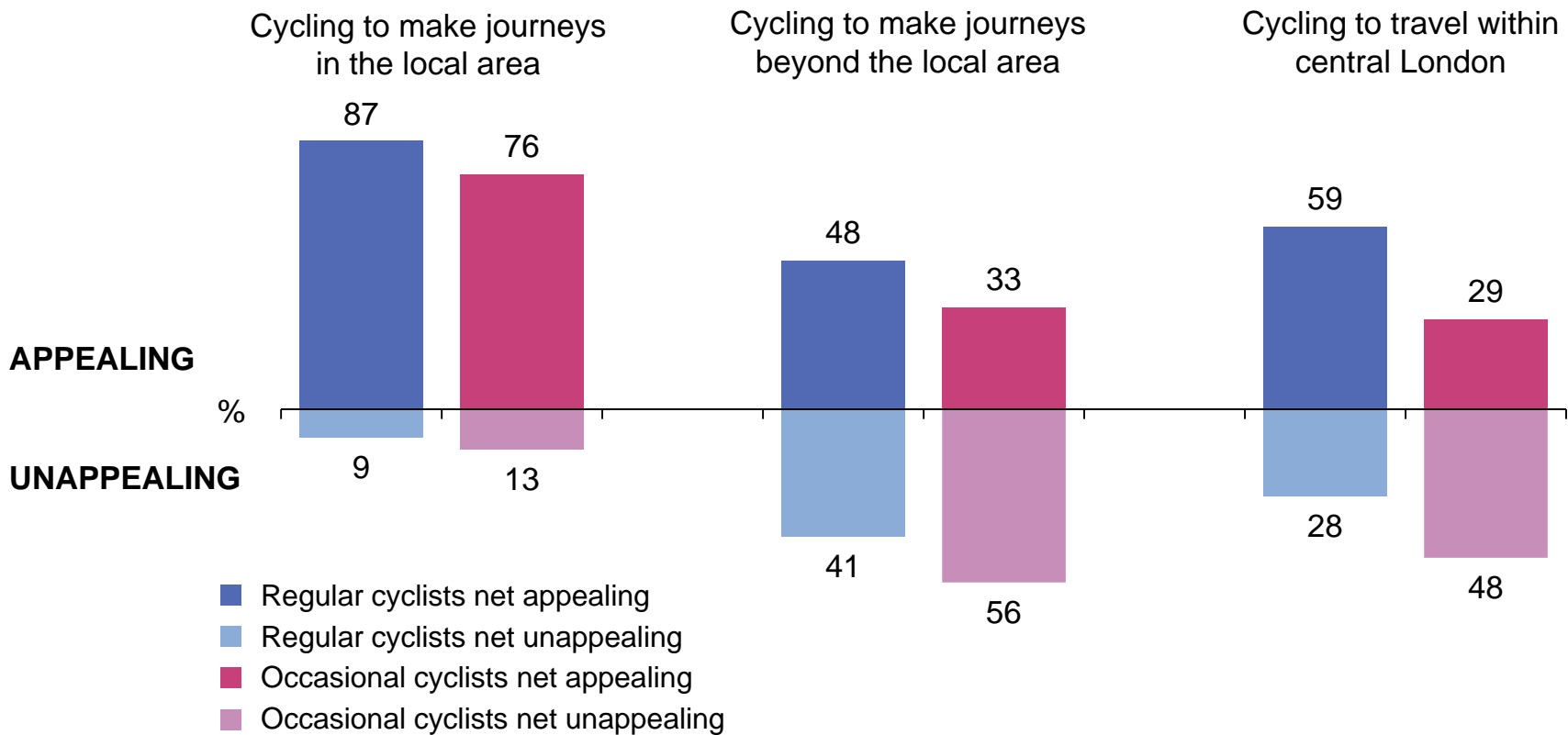
QC3a: Thinking specifically about cycling, can you please tell me how appealing or unappealing you find it for XXX. Do you find it ...?

Base: all cyclists (176)



Occasional cyclists tend to find cycling journeys less appealing than regular cyclists for all journey types

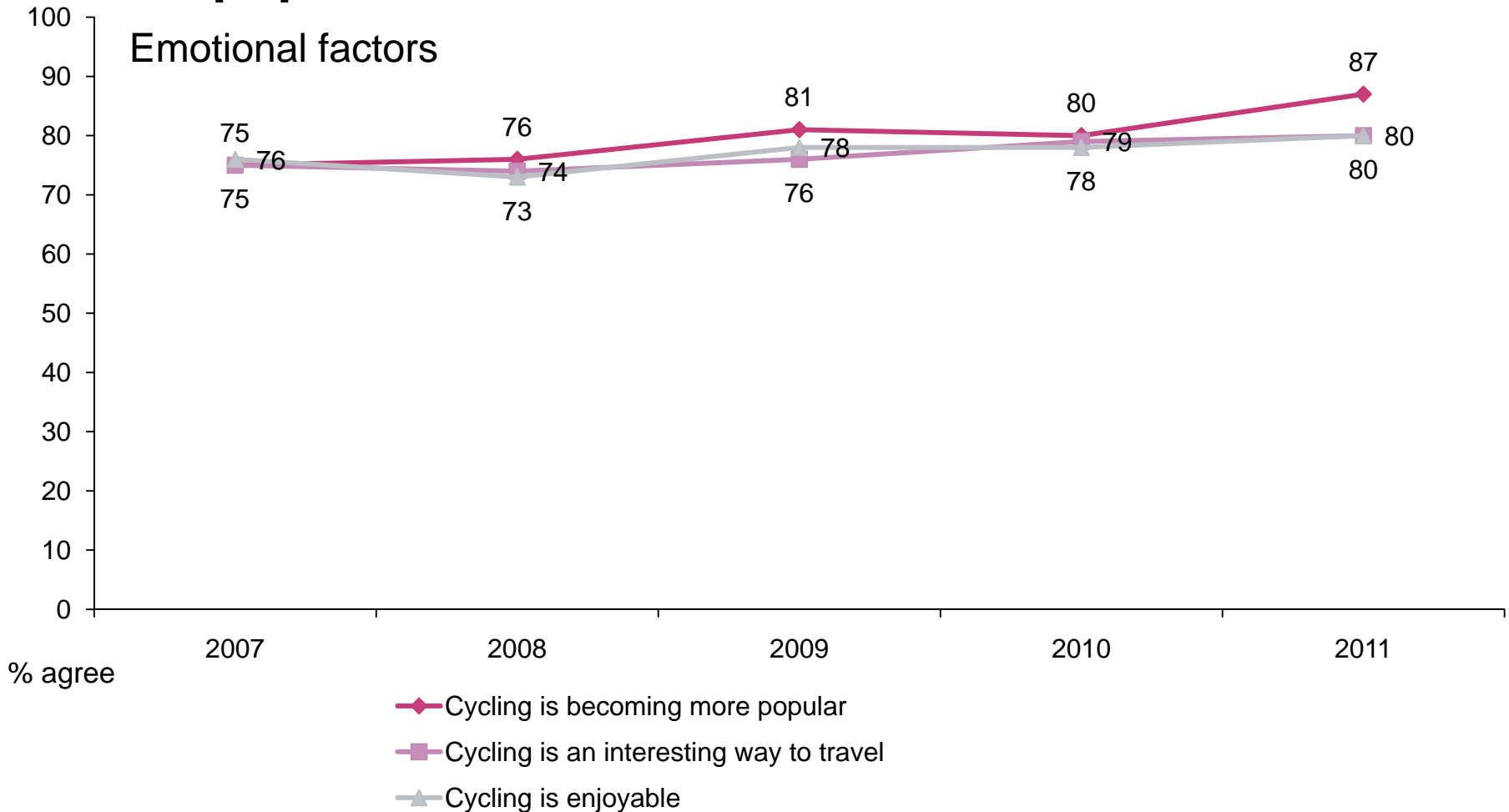
Appeal of cycling in specific scenarios – Cyclists



QC3a: 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 (115) and occasional cyclists (61)

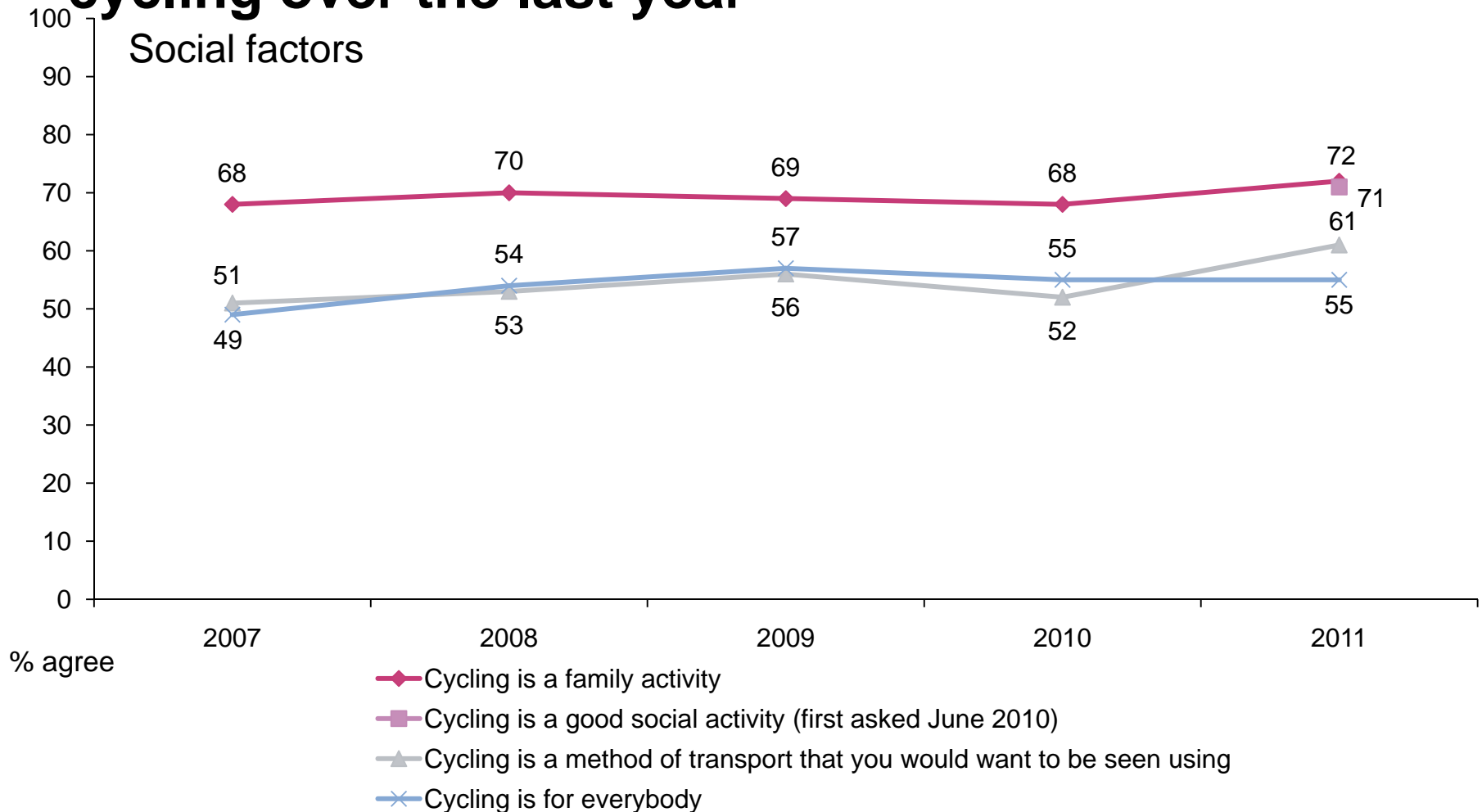
There has been a year on year increase in the proportion to believe that cycling is becoming more popular



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 – 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

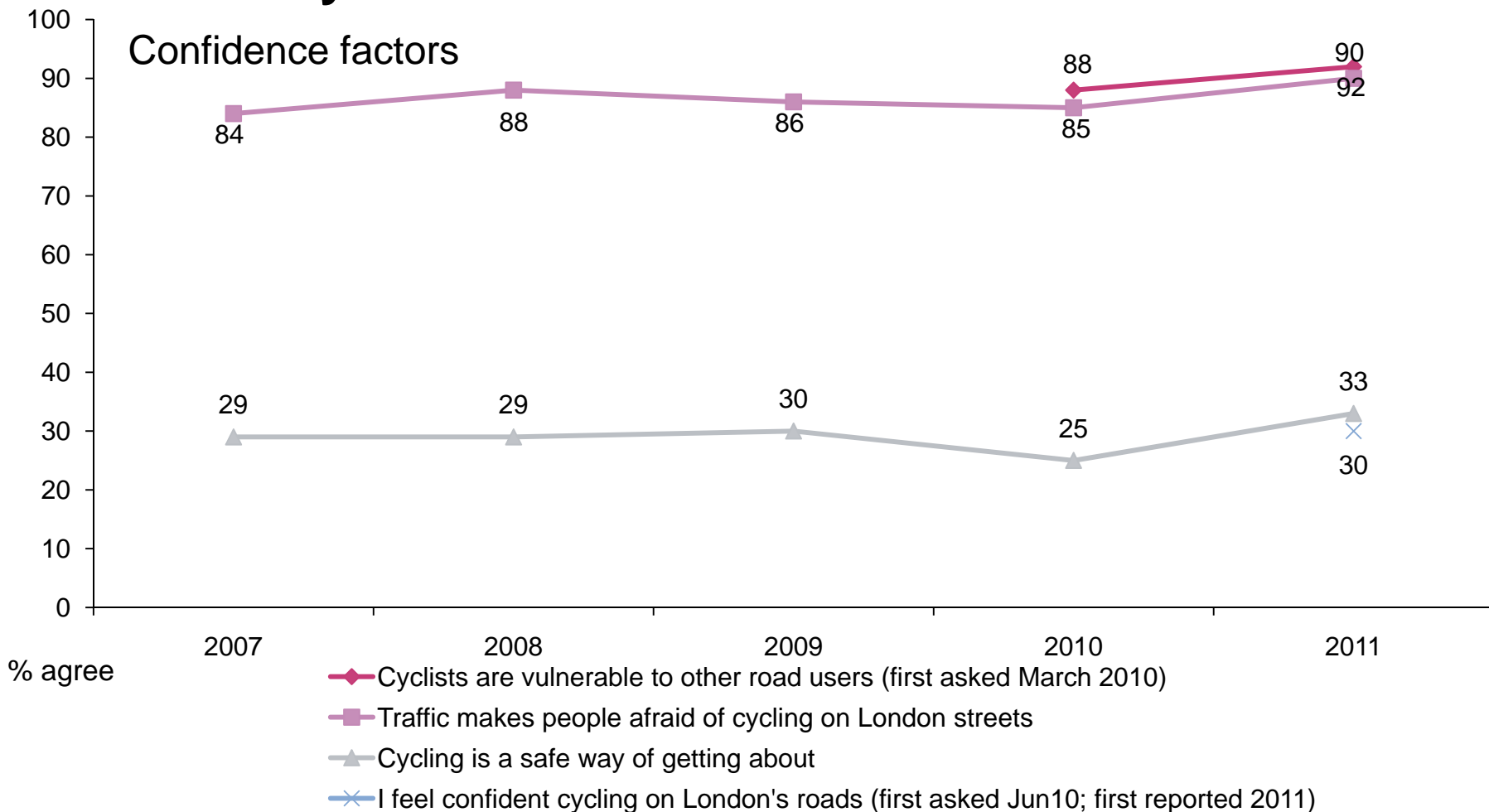
There has been a large increase in the proportion saying they would like to be seen cycling over the last year



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 – 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

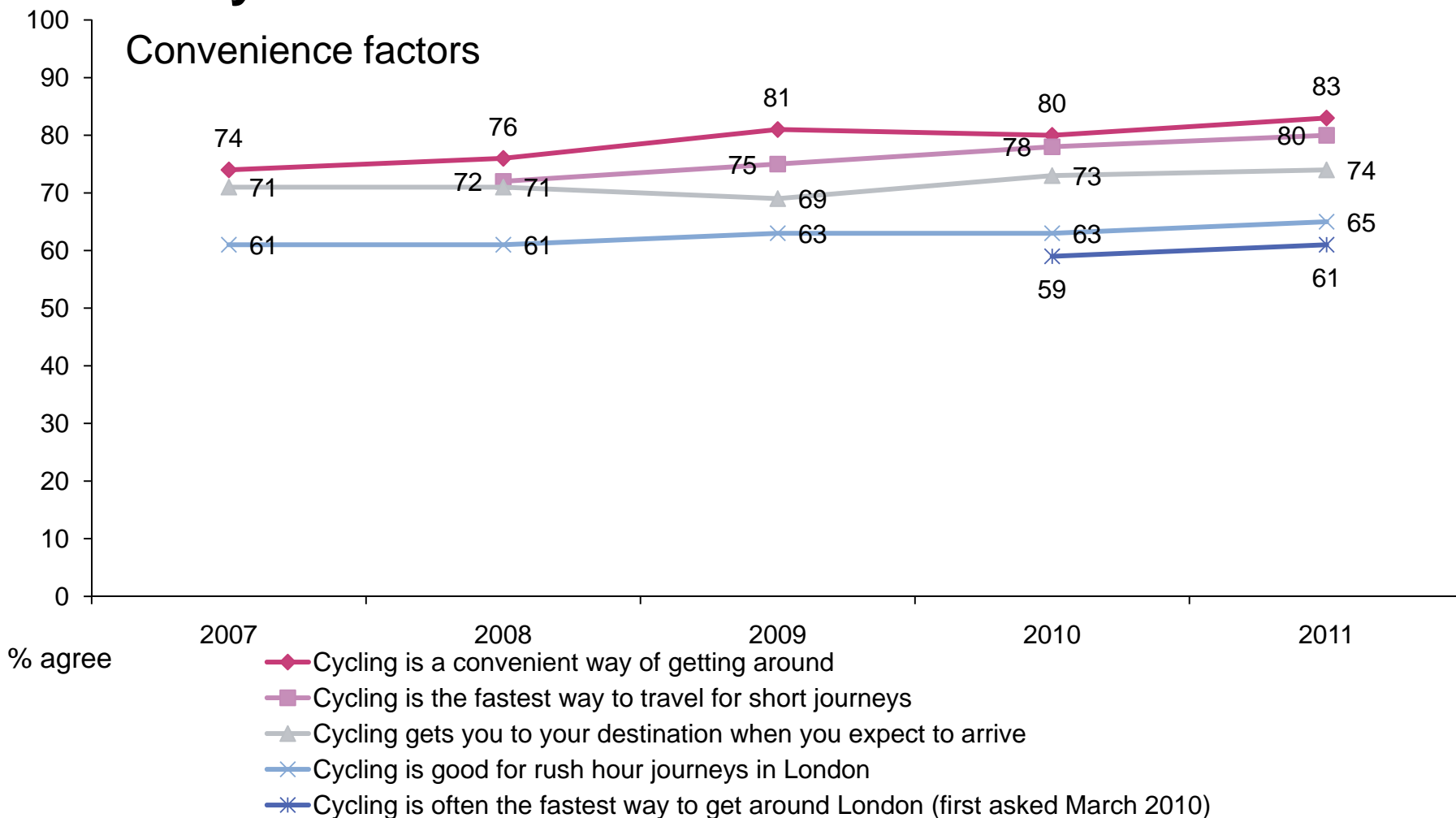
There has been an increase in perception of safety, but the proportion saying traffic makes people afraid to cycle has also risen



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 – 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

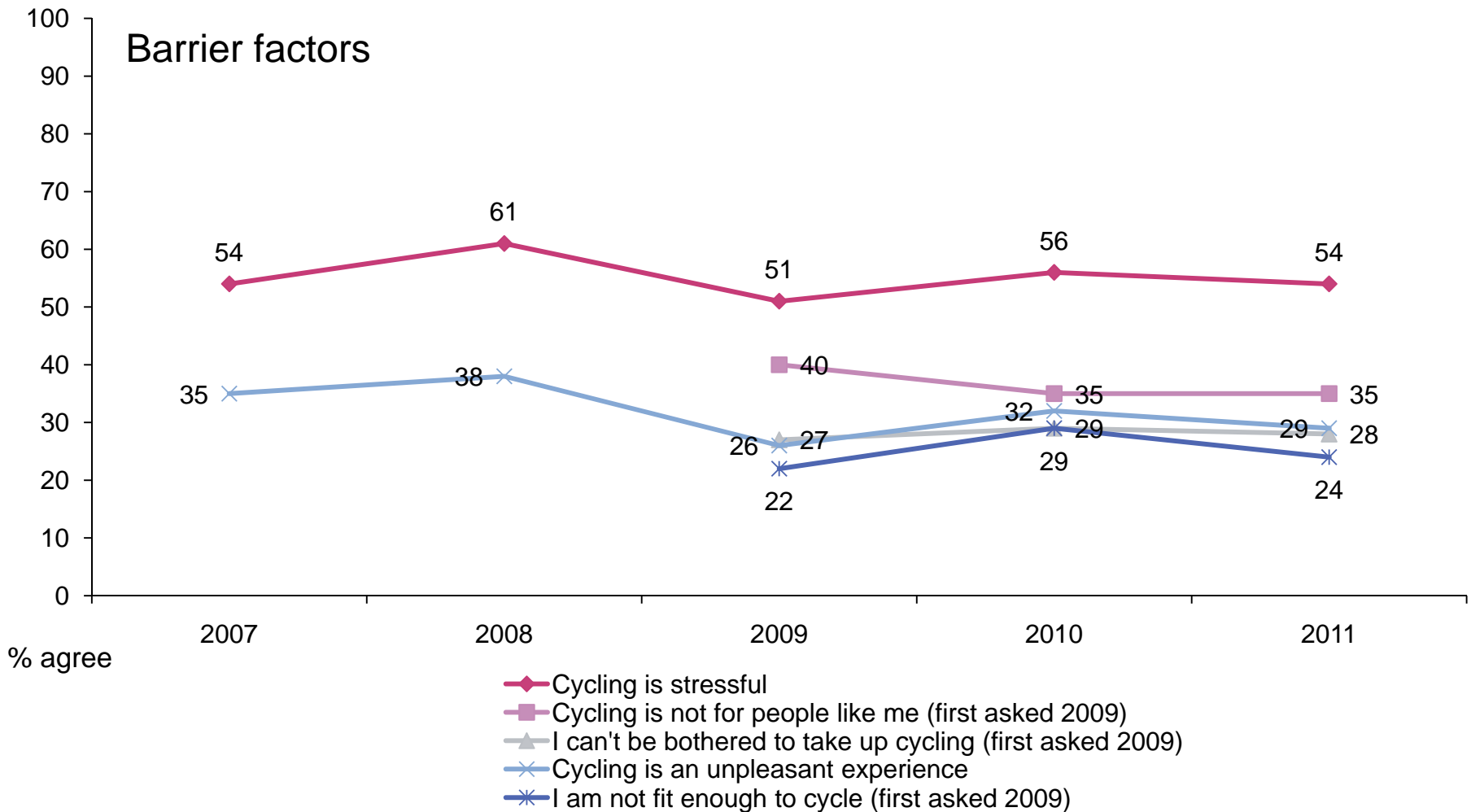
The proportion believing that cycling is a convenient way to get around has increased steadily since 2007



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 – 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

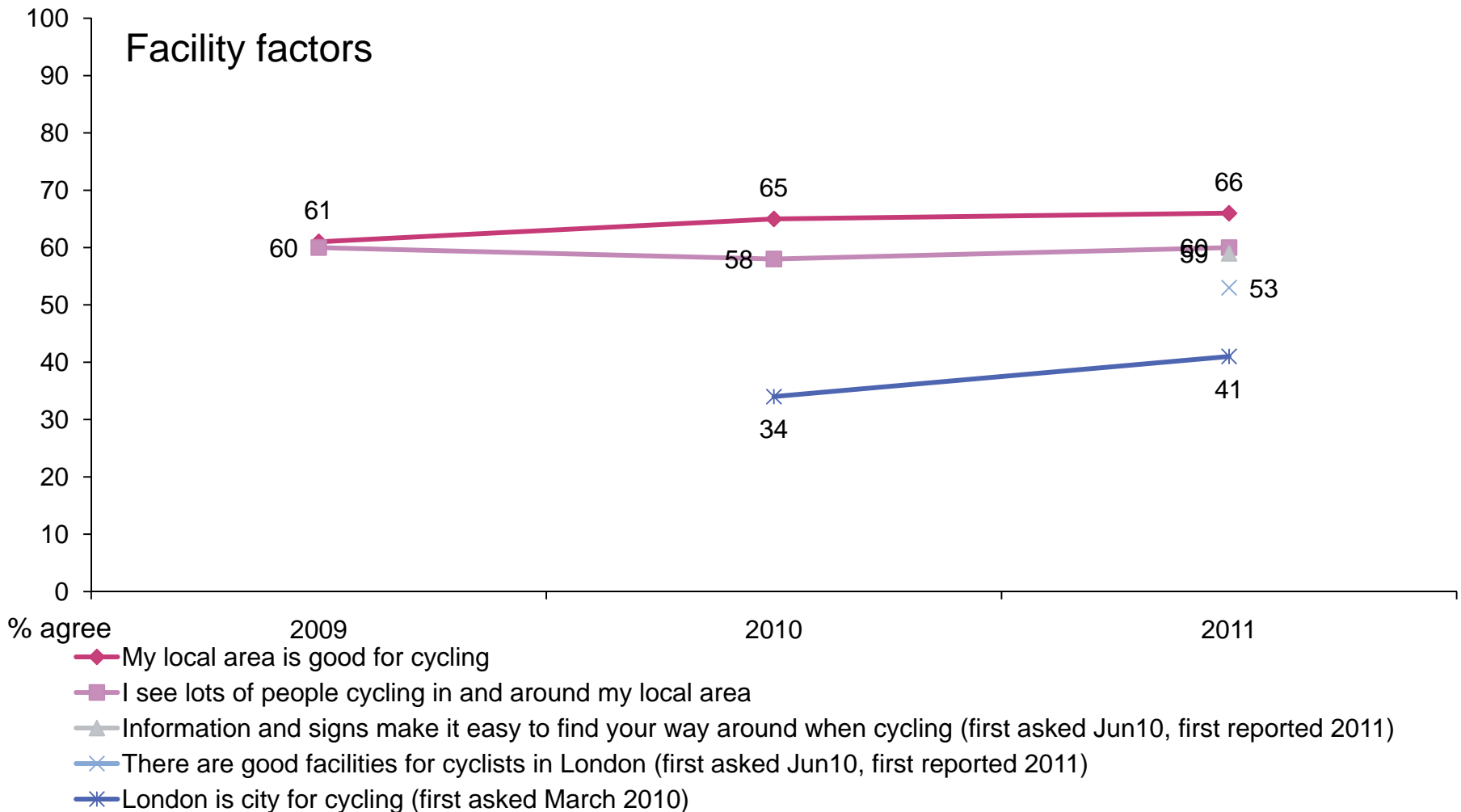
Around a third of Londoners say that cycling is not for them



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 – 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

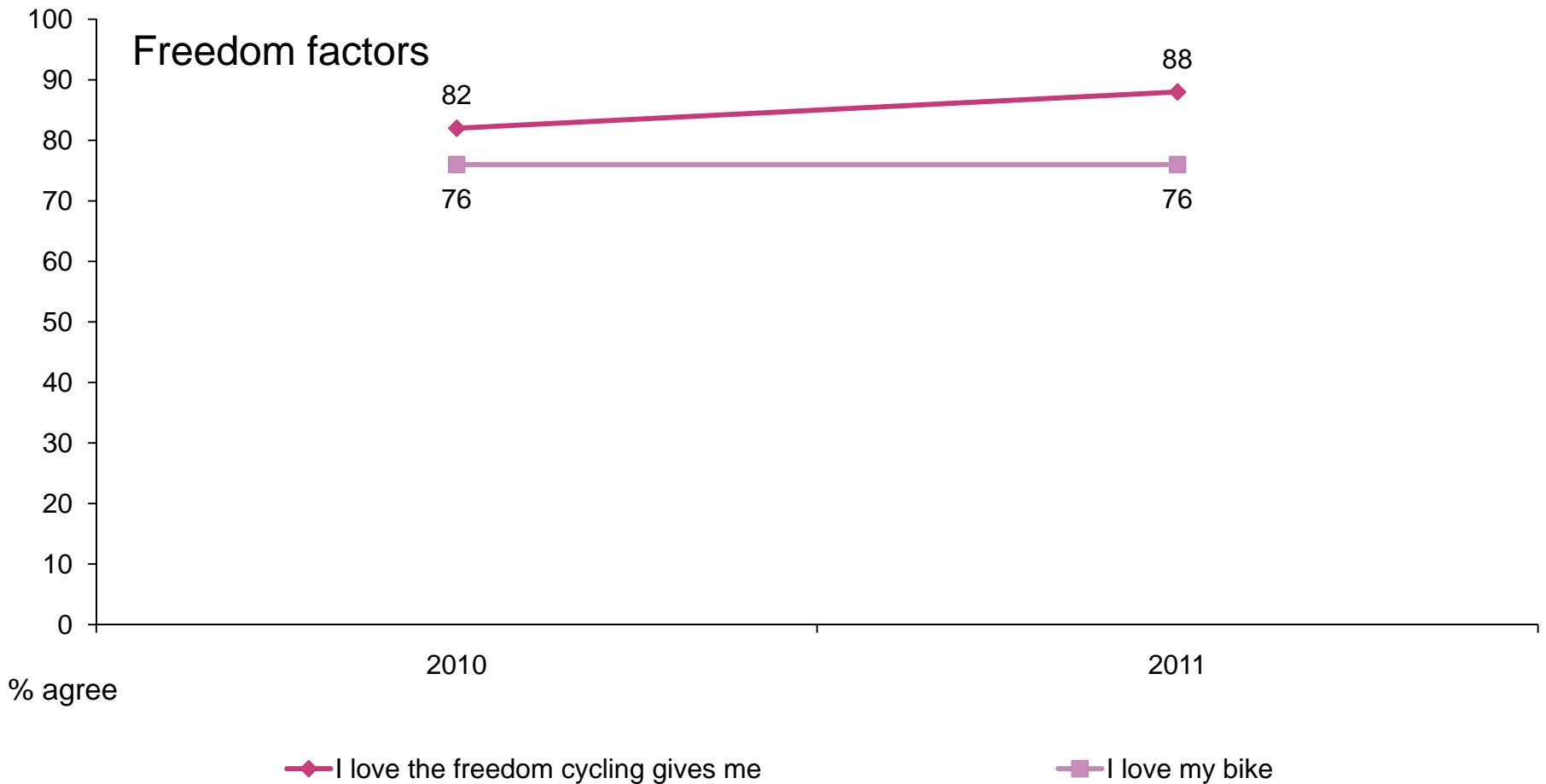
Two fifths of Londoners now believe that London is a city for cycling, up from 34% a year ago



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 – 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

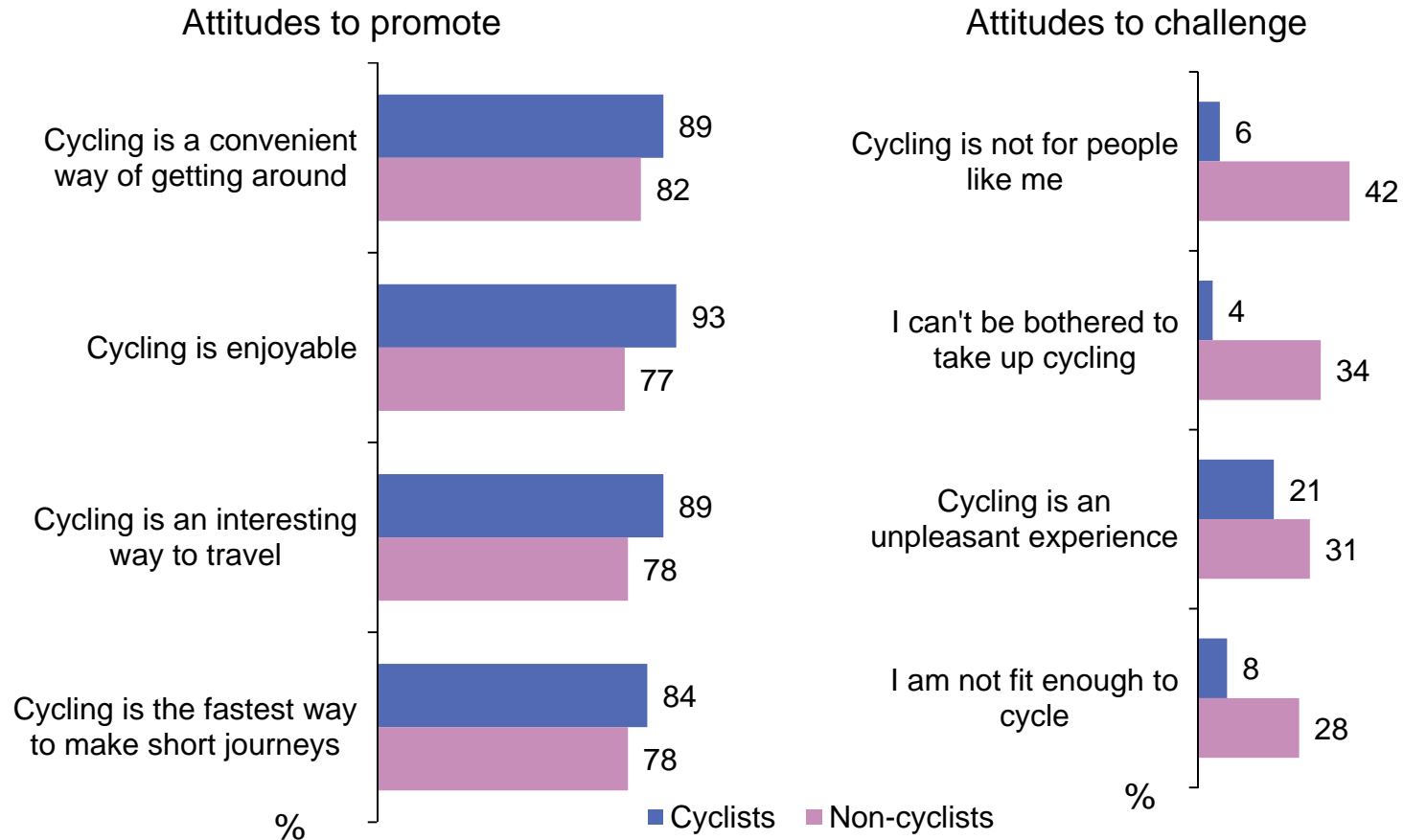
Most cyclists love their bikes, and the freedom that cycling gives them



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



Certain areas may be targeted to promote cycling amongst non-cyclists

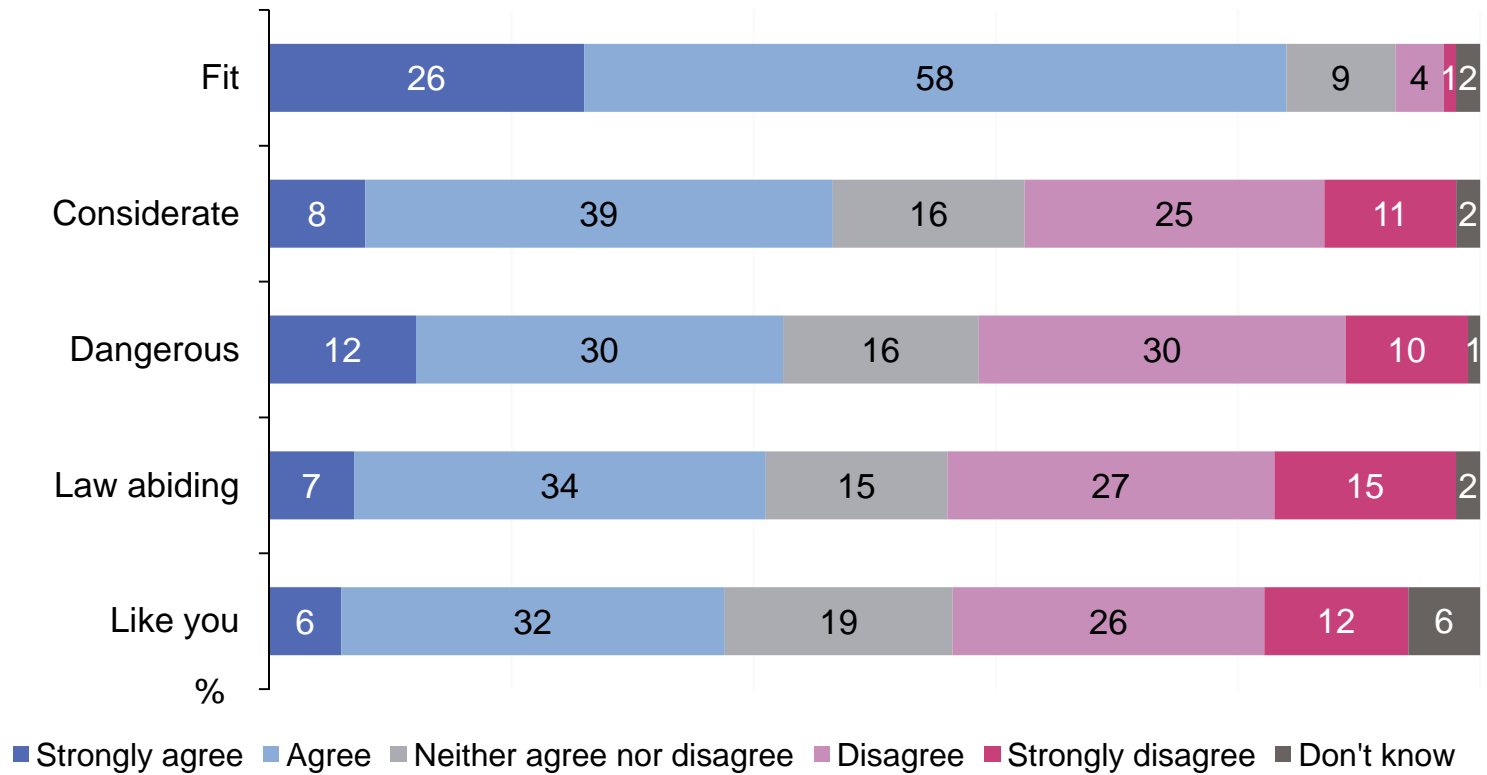


QC2: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London
Base: cyclists (203), non-cyclists (863)



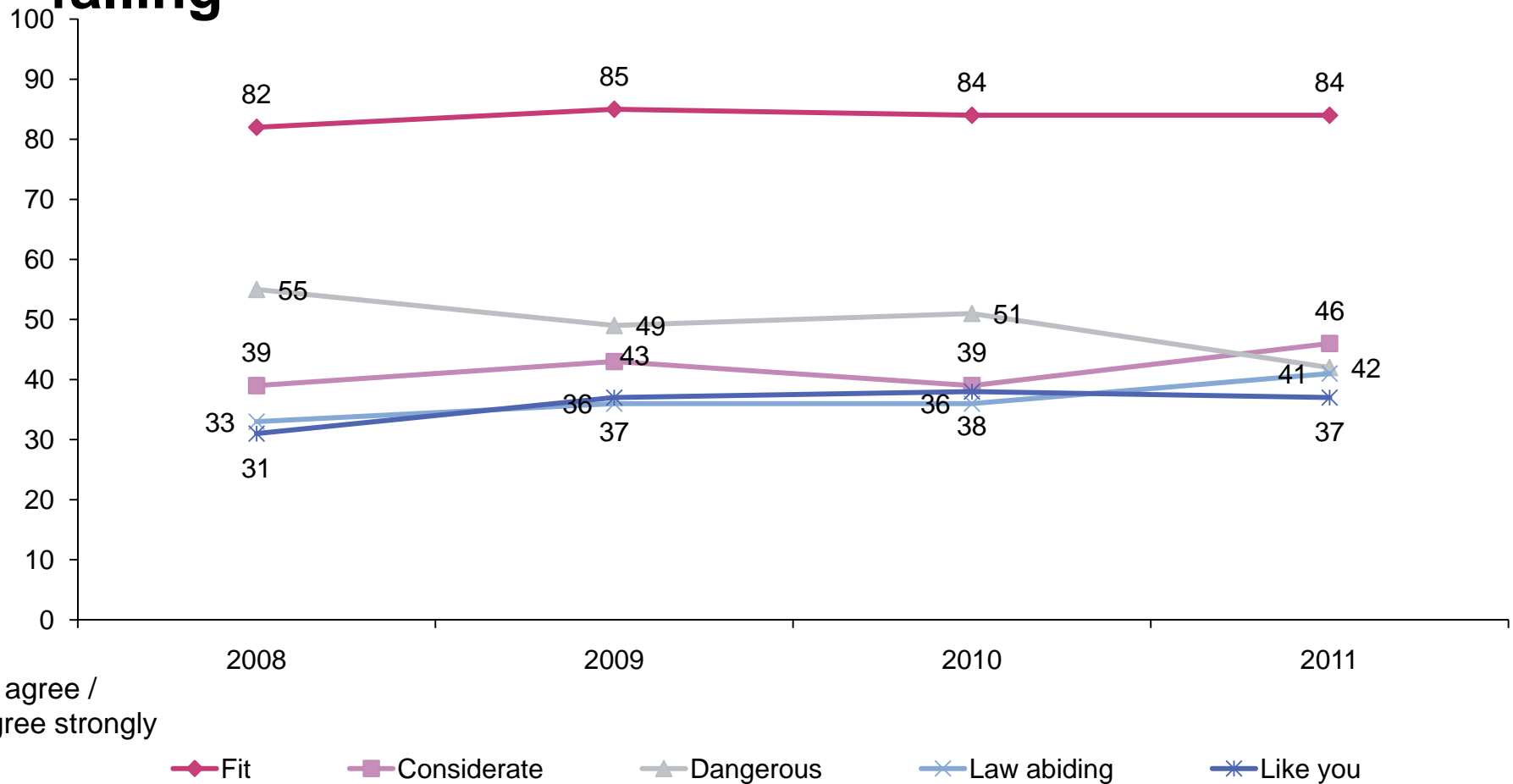
Most Londoners perceive cyclists to be fit

Attitudes towards cyclists



QC5g: Do you feel that cyclists in general are xxx?
Base: All (1,066)

The proportion of Londoners to believe that cyclists are dangerous has been steadily falling

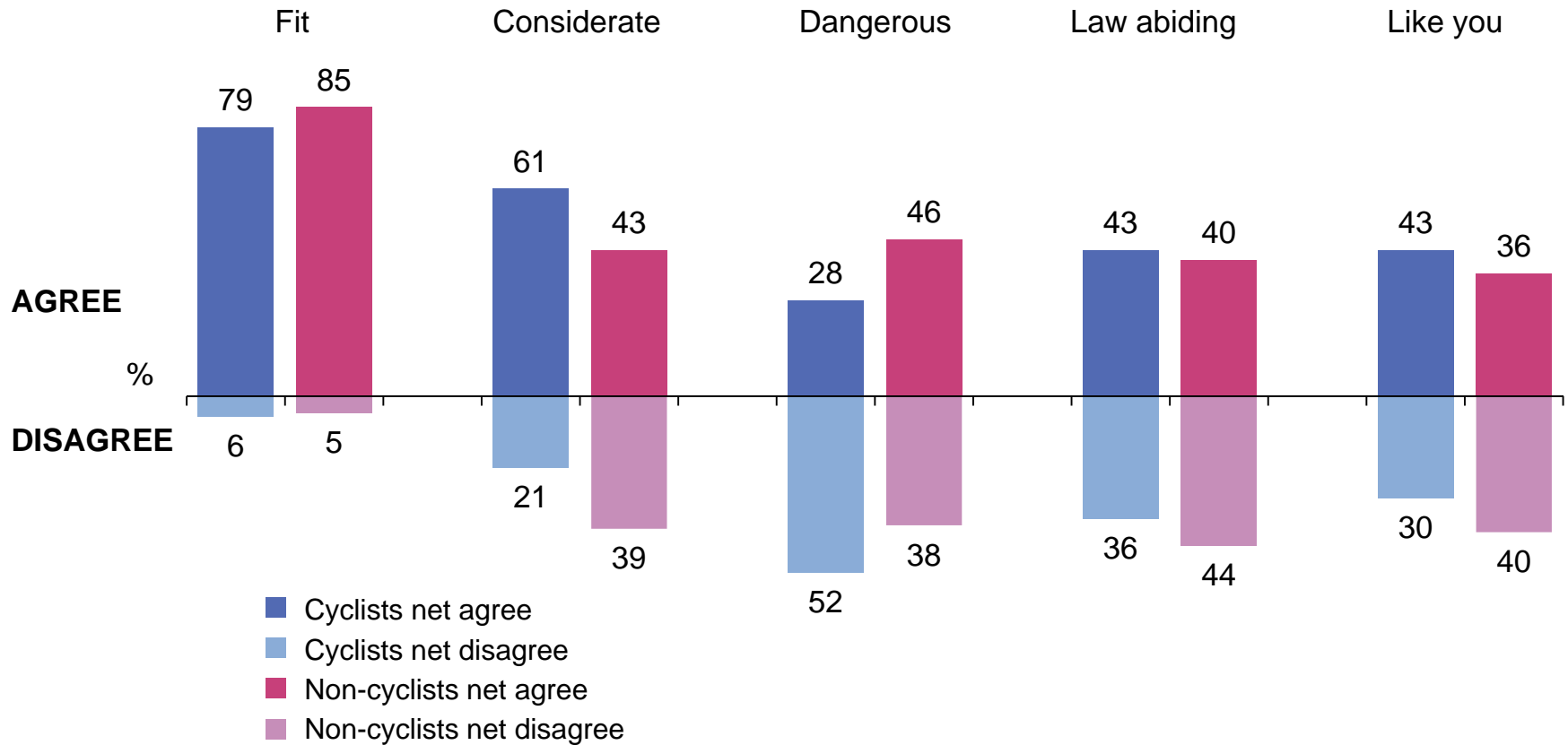


QC2: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London
 Base: All – 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)



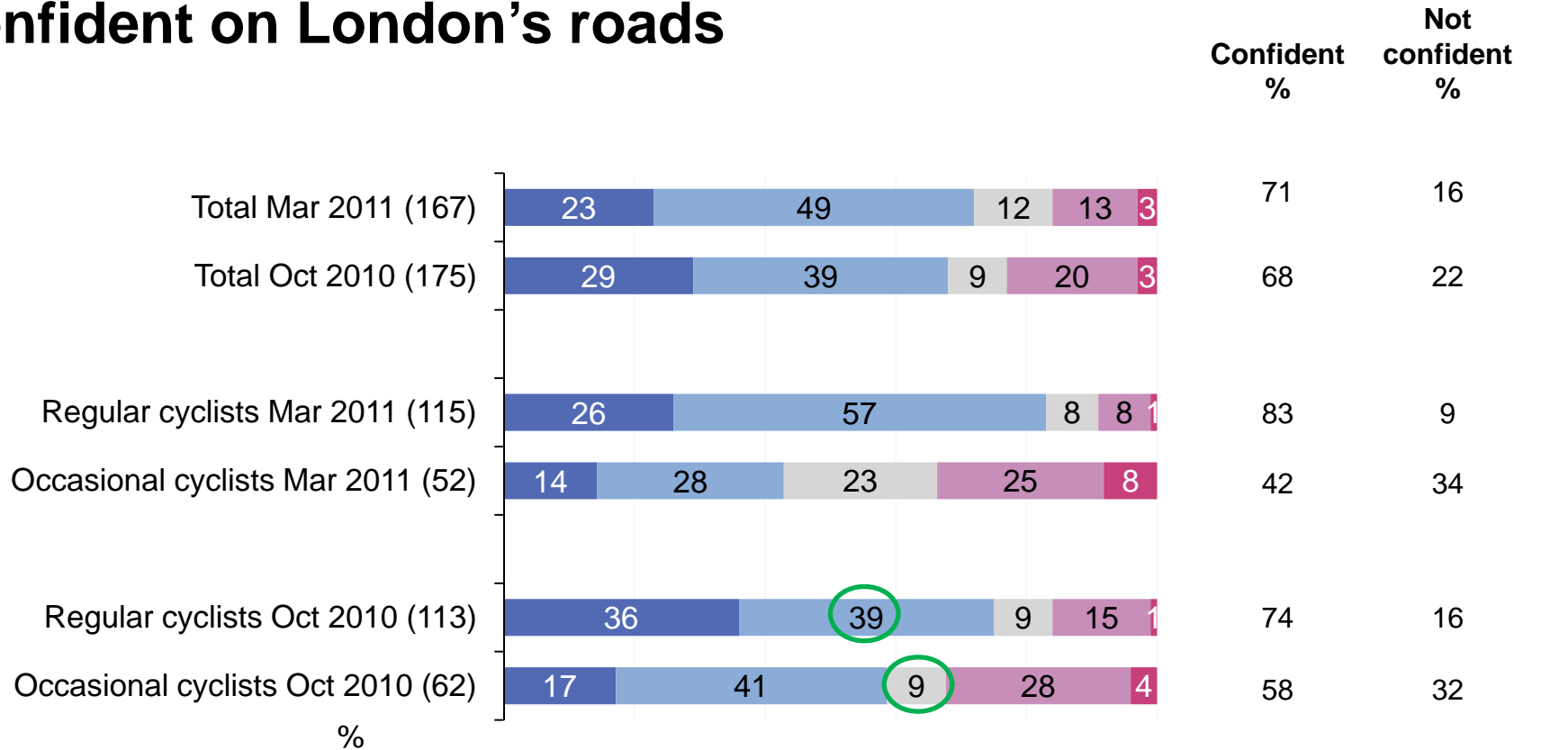
Non-cyclists are more likely to consider cyclists to be fit, dangerous, and not 'considerate'

Cyclist and non-cyclists



QC5g: Do you feel that cyclists in general are xxx?
Base: all cyclists (176), all non-cyclists (890)

Compared with last wave, amongst regular cyclists a larger proportion say they are fairly, rather than very, confident on London's roads



■ Very confident ■ Fairly confident ■ Neither confident nor unconfident ■ Not very confident ■ Not at all confident

○ Significantly lower than March 2011 □ Significantly higher than March 2011

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

BARRIERS

Barriers

There are clear areas where the impact of potential deterrents to cycling can be reduced. Amongst cyclists, 65% consider bike security, and 53% consider the availability of cycle racks, to be poor.

Amongst those considering taking up cycling, concern about safety is the most deterring factor for 69%, with concern about riding ability (11%) and fitness level (10%) substantially less of an issue.

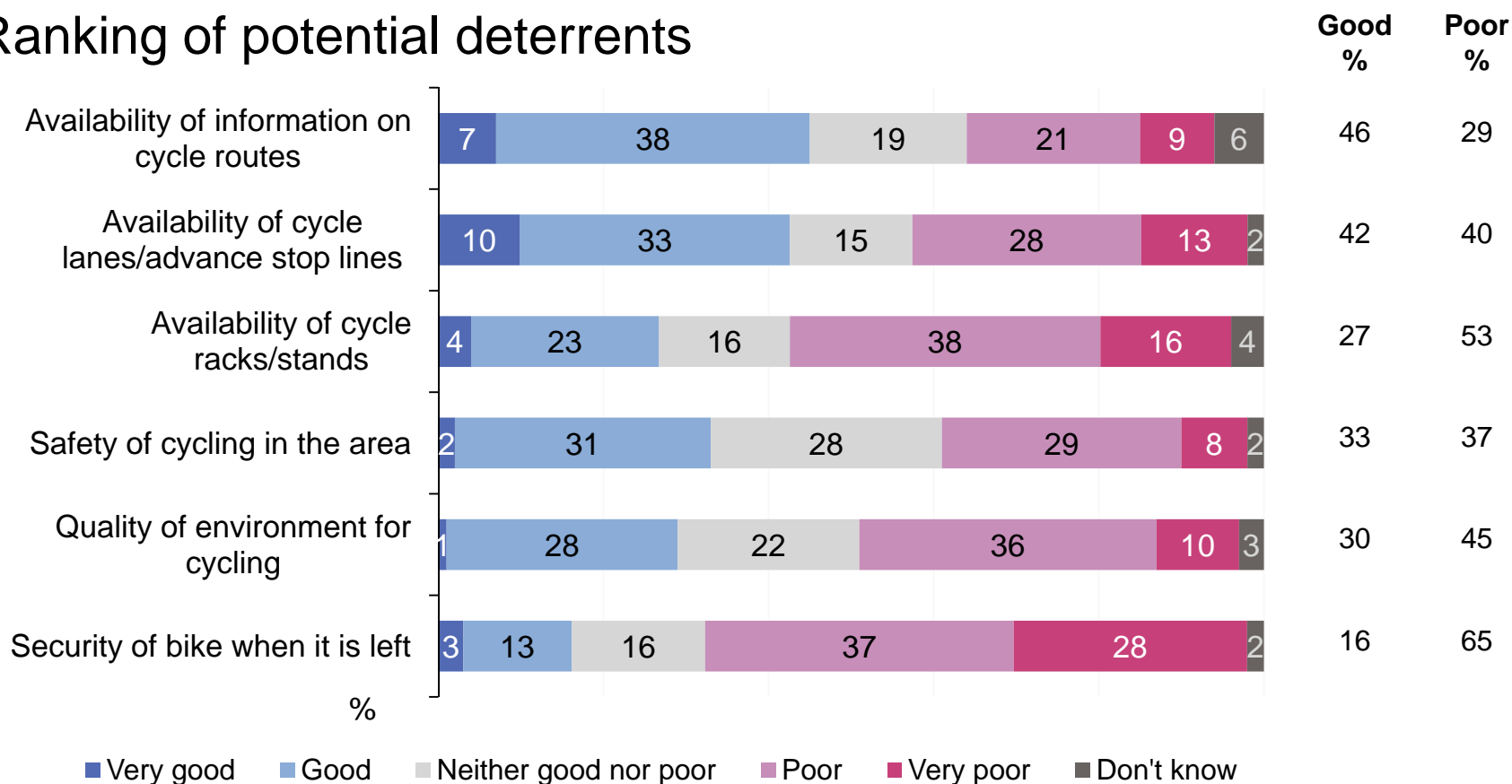
When thinking about crime and antisocial behaviour, cycling during the day is considered to be safer than cycling at night, across both central London and in local areas. 33% of Londoners believe cycling at night in central London is safe from crime and antisocial behaviour, with this rising to 50% for cycling at night in the local area.

Amongst cyclists, busy roads are much more likely to be considered unsafe than quiet streets; four fifths of cyclists consider quiet roads to be safe, compared with just 49% (regular cyclists) or 28% (occasional cyclists) for busy roads.



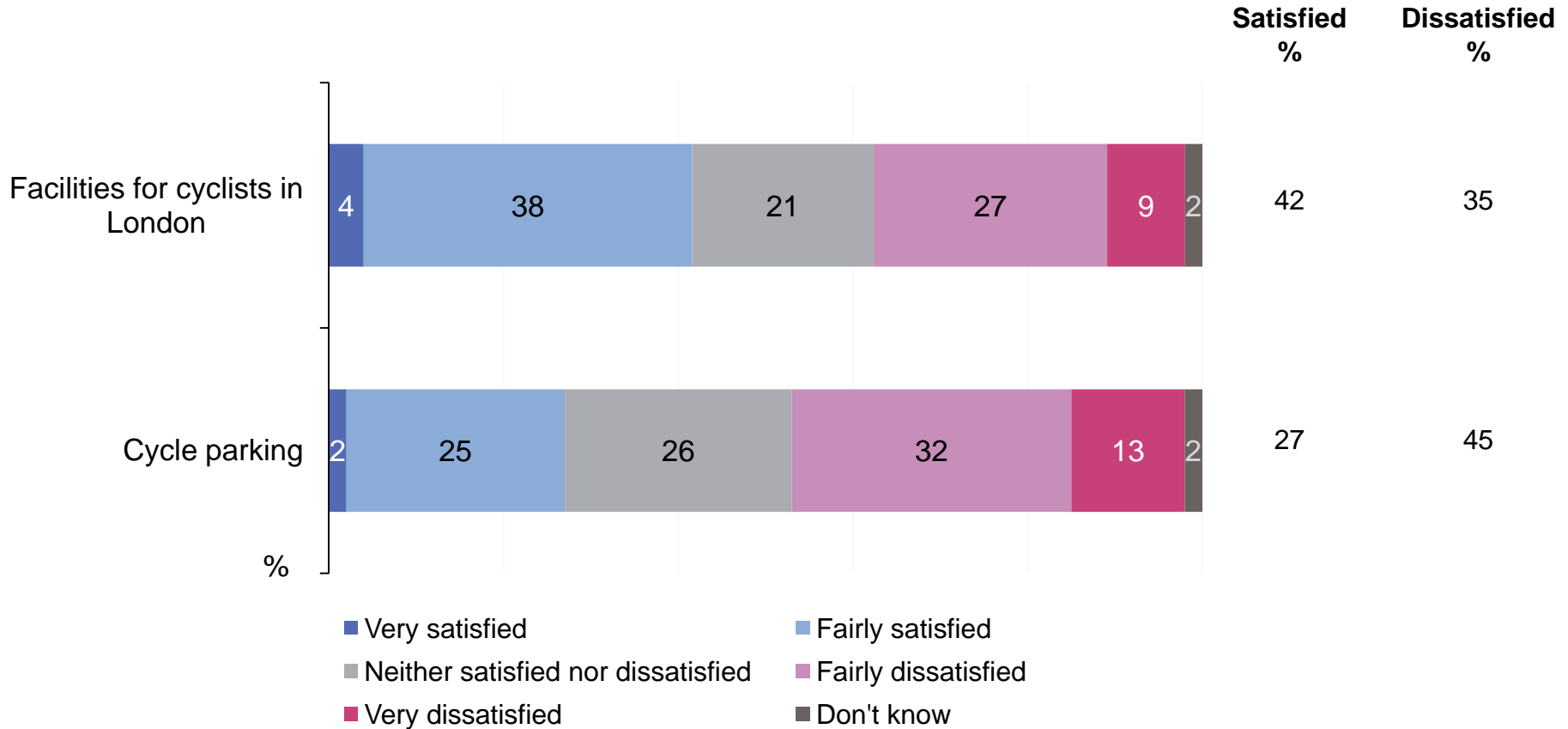
Bike security and the availability of cycle racks continue to be most in need of improvement

Ranking of potential deterrents



QCYCLING_ATTITUDES: How would you rate the following aspects of cycling in London?
Base: Those who have cycled around London within the last 12 months (167)

Cyclists are more likely to be dissatisfied with cycle parking than cycling facilities in general



QBIKE_SATISFIED: Generally, how satisfied are you with the facilities for cyclists in London?

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

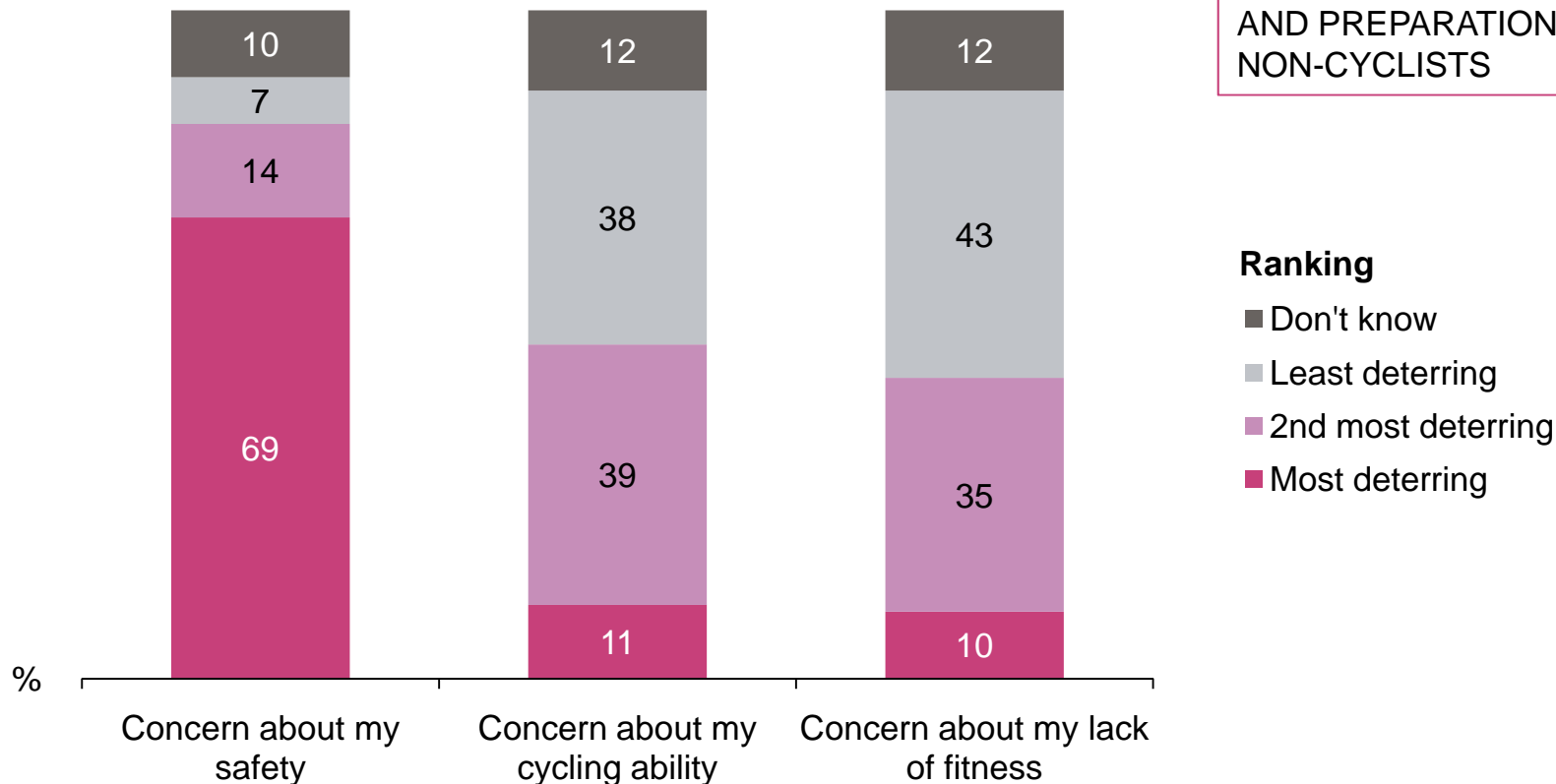
Base: Those who have cycled around London within the last 12 months (167)



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

Ranking of key deterrents

PRIMED*
AND PREPARATION
NON-CYCLISTS



Ranking

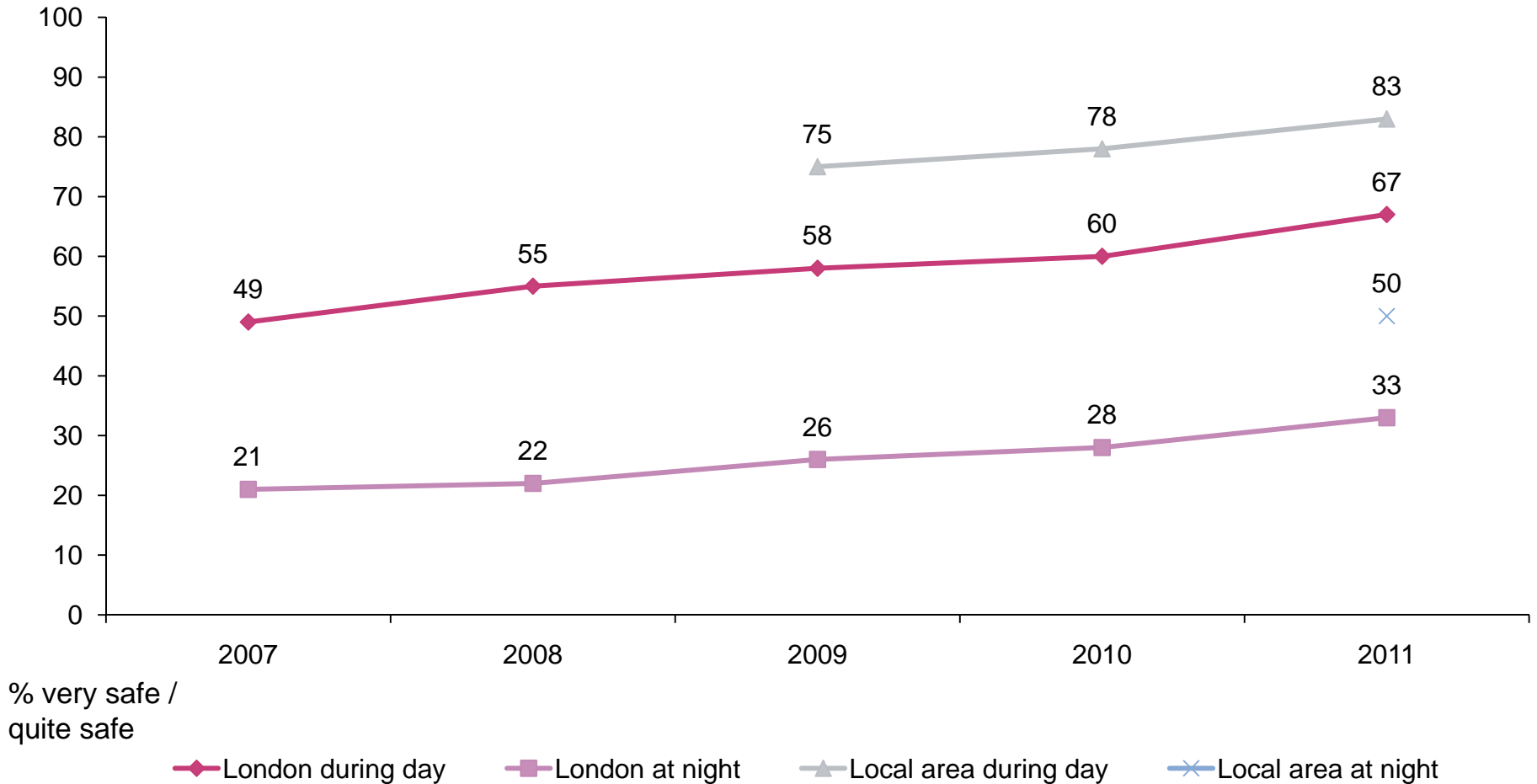
- Don't know
- Least deterring
- 2nd most deterring
- Most deterring

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

Base: Those "thinking about...decided to...are setting things in place to..." take up cycling (175)

* Includes 'primed' individuals except those who 'were doing this but couldn't stick to it' at QTAKEUP1

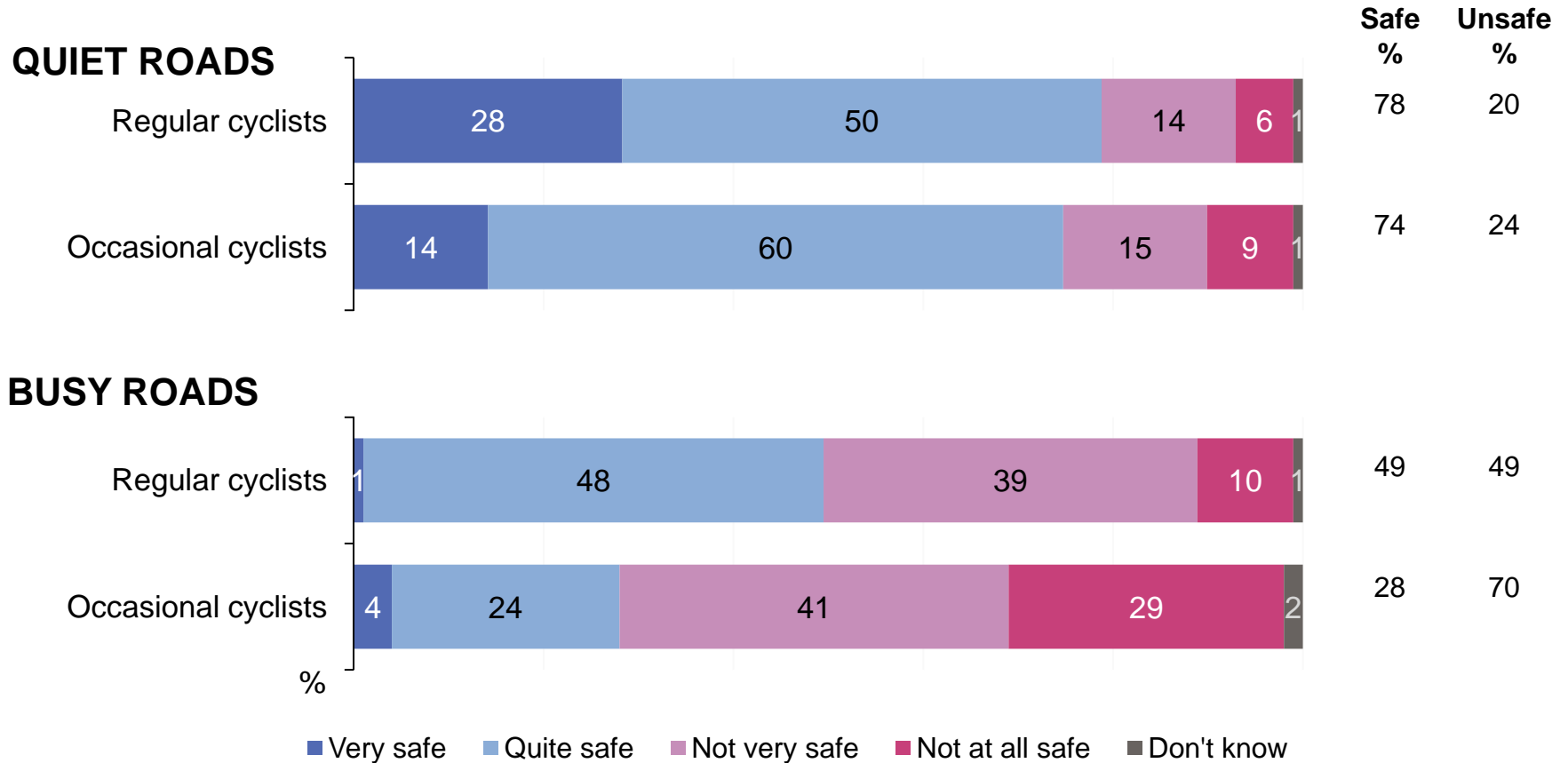
There is a general upward trend in the proportion of Londoners who feel safe from crime/anti-social behaviour when thinking about cycling in London and/or their local area



C13A, C13B, C13AA, C13BA. Thinking about cycling in {London/local area} {during the day/at night}, how safe from crime or antisocial behaviour do you feel? Base: All – 2011 (1,066), 2010 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)



Cyclists are much more likely to feel safe on quiet roads than busy ones – particularly regular cyclists



QC13d/e: In respect of the traffic you encounter on quiet/busy roads, would you say you feel...
Base: Regular cyclists (115), occasional cyclists (52)

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 (although there plans for expansion into other areas of the Capital)
- Barclays Cycle Superhighways, which are a series of cycle routes running from outer to central London. The first two were opened in summer 2010, two more opened in summer 2011, and eight more routes will be active by 2015
- Cycling events, such as the Tour of Britain London leg (an international cycling competition similar to the Tour de France), and Sky Ride (which is open to all)
- Cycle training, which is provided by London boroughs in conjunction with TfL, amongst other cycle training schemes (eg those organised through employers)

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

Barclays Cycle Hire

Barclays Cycle Hire

Awareness of Barclays Cycle Hire remains high with 82% of Londoners aware of the scheme. There was a dramatic increase in awareness last autumn after its launch but awareness has remained steady since October 2010.

3% have used Barclays Cycle Hire, in line with October 2010, although 21% say they are likely to use the scheme in the future. 35% of those likely to use the scheme (or who have used it already) estimate their frequency of use to be at least twice a week.

79% envisage using Barclays Cycle Hire for leisure, with around a third saying they will use the scheme as a commuter or shopper.

Of those non-cyclists who say they are likely to use Barclays Cycle Hire, half (51%) say they would have been unlikely to cycle had the scheme not been launched. 1% (1 out of 49) mention Barclays Cycle Hire when asked what practical steps have they taken towards cycling more.



The majority of Londoners are aware of Barclays Cycle Hire

Awareness of Barclays Cycle Hire

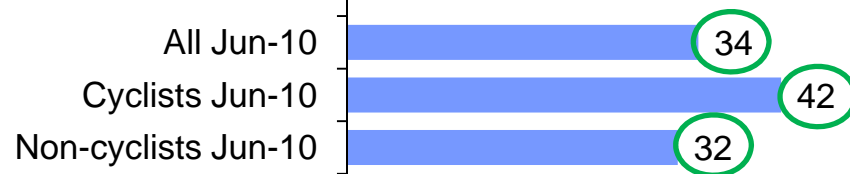
March 2011



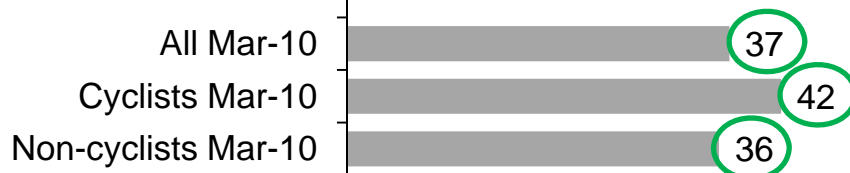
October 2010




June 2010



March 2010



%

 Significantly lower than Mar2011

QCH1: Are you aware that Barclays Cycle Hire was launched this summer?
Base: All – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007)
Cyclists – Mar11 (176), Oct10 (182), June10 (170), Mar10 (156)
Non-cyclists – Mar11 (890), Oct10 (835), June10 (830), Mar10 (851)



Use of Barclays Cycle Hire

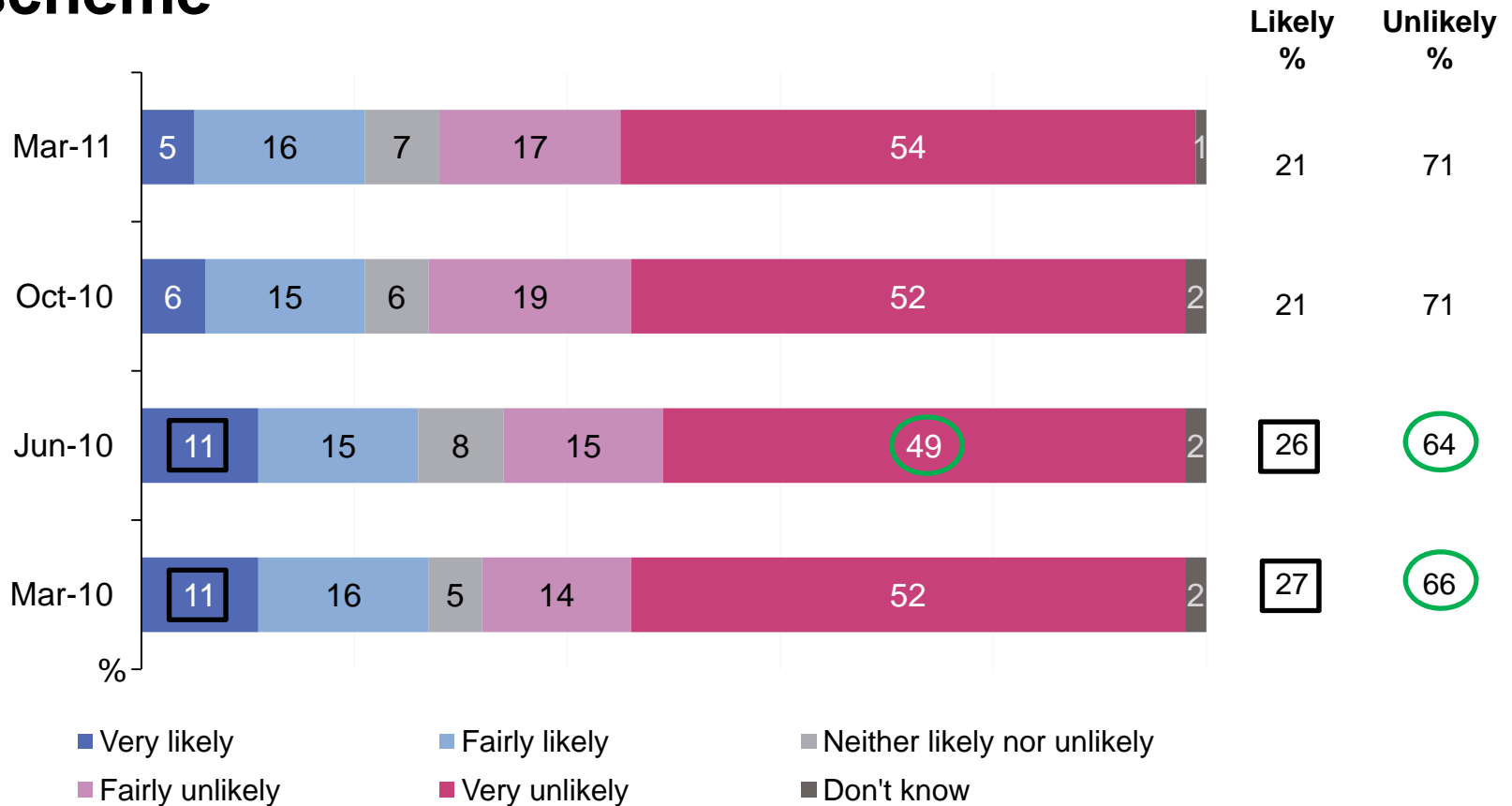
- 3% have used Barclays Cycle Hire by the time of the research (March 2011)
- Equating to 25 people in our sample
- 24 had hired a bicycle, 1 had registered but were yet to hire a bicycle

Demographic	Unweighted Number (25)
Male	13
Female	12
16-34	12
35-54	12
55+	1
White	16
BAME	9
Working	17
Not working	8
AB	5
C1	10
C2	2
DE	2

Caution low base size



A fifth of Londoners who have not used Barclays Cycle Hire say they are likely to use the scheme



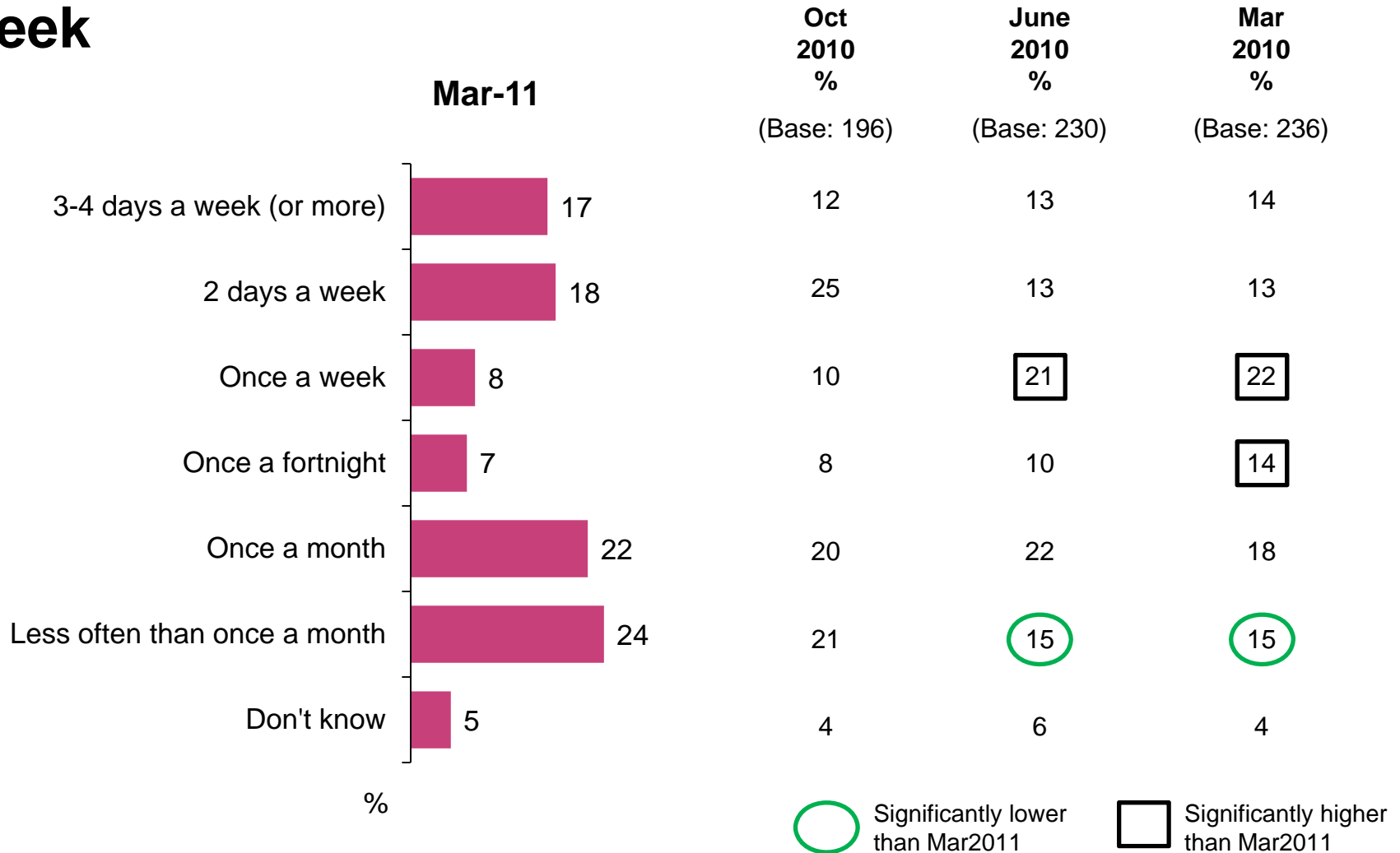
Significantly lower than Mar2011

Significantly higher than Mar2011

QCH2: How likely do you think it is that you will use Barclays Cycle Hire?
 Base: those who have not used Barclays Cycle Hire scheme yet, Mar11 (1,042), Oct10 (1,001), Jun10 (1,000), Mar10 (1,007)



35% of those who say they will use Barclays Cycle Hire anticipate doing so a least twice a week

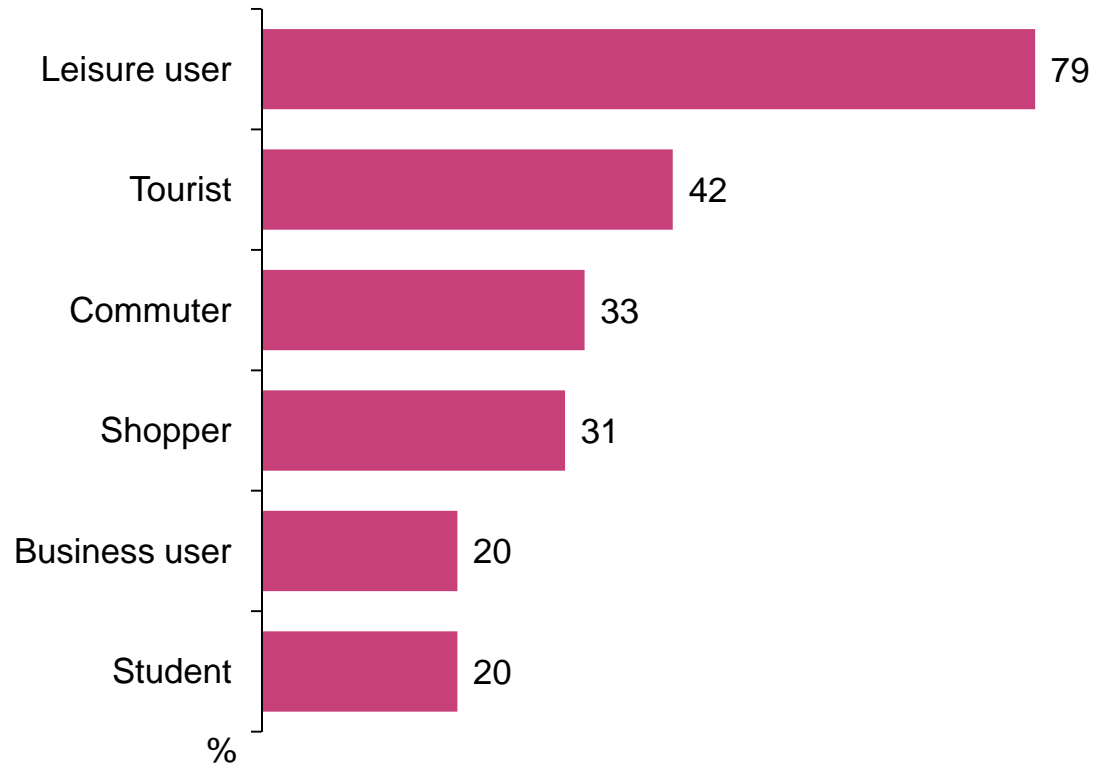


QCH2a: Which of the following best describes how often you expect that you will make use of Barclays Cycle Hire?

Base: all those who have used Barclays Cycle Hire or who are very/fairly likely to do so (214)



Most see themselves using Barclays Cycle Hire for leisure and this has not changed since October 2010

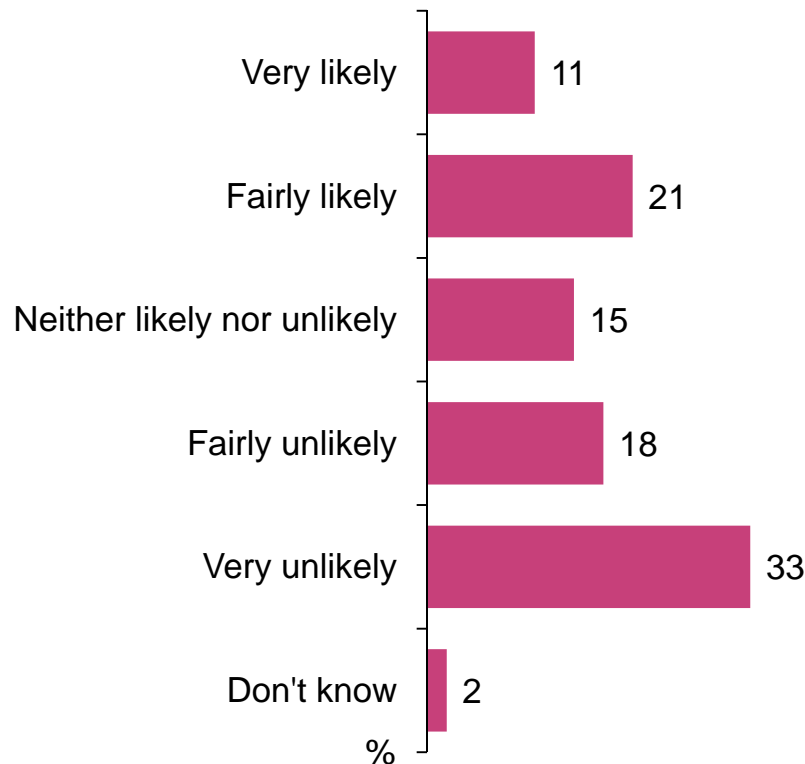


QCH2b: Will you be using the Barclays Cycle Hire as a...?

Base: all those who have used Barclays Cycle Hire or who are very/fairly likely to do so (214)



Half of those who have used/think they will use Barclays Cycle Hire would have been unlikely to cycle without the scheme



QCH3 How likely do you think you would have been to cycle in the next 12 months if Barclays Cycle Hire had not been launched?

Base: all those who do not cycle but are likely to hire and bicycle, and those who have hired a bicycle (147)

Barclays Cycle Superhighways

Barclays Cycle Superhighways

There has been a decline since October 2010 in the awareness of Barclays Cycle Superhighways. 43% of Londoners are aware of Superhighways compared with 58% in October 2010. However, awareness remains higher than both this time last year and June 2010. The construction of the two latest Barclays Cycle Superhighways, announced after this wave's fieldwork, is likely to increase awareness again.

3% of Londoners have used a Barclays Cycle Superhighway compared to 4% in October 2010. Expected future use remains in line with October 2010 at 17%, with 49% of these individuals reporting they will use them at least two days a week.

As with Barclays Cycle Hire, most envisage they will use the Superhighways for leisure (75%), with commuting (50%), tourism (42%) and shopping (35%) the next most common reasons.

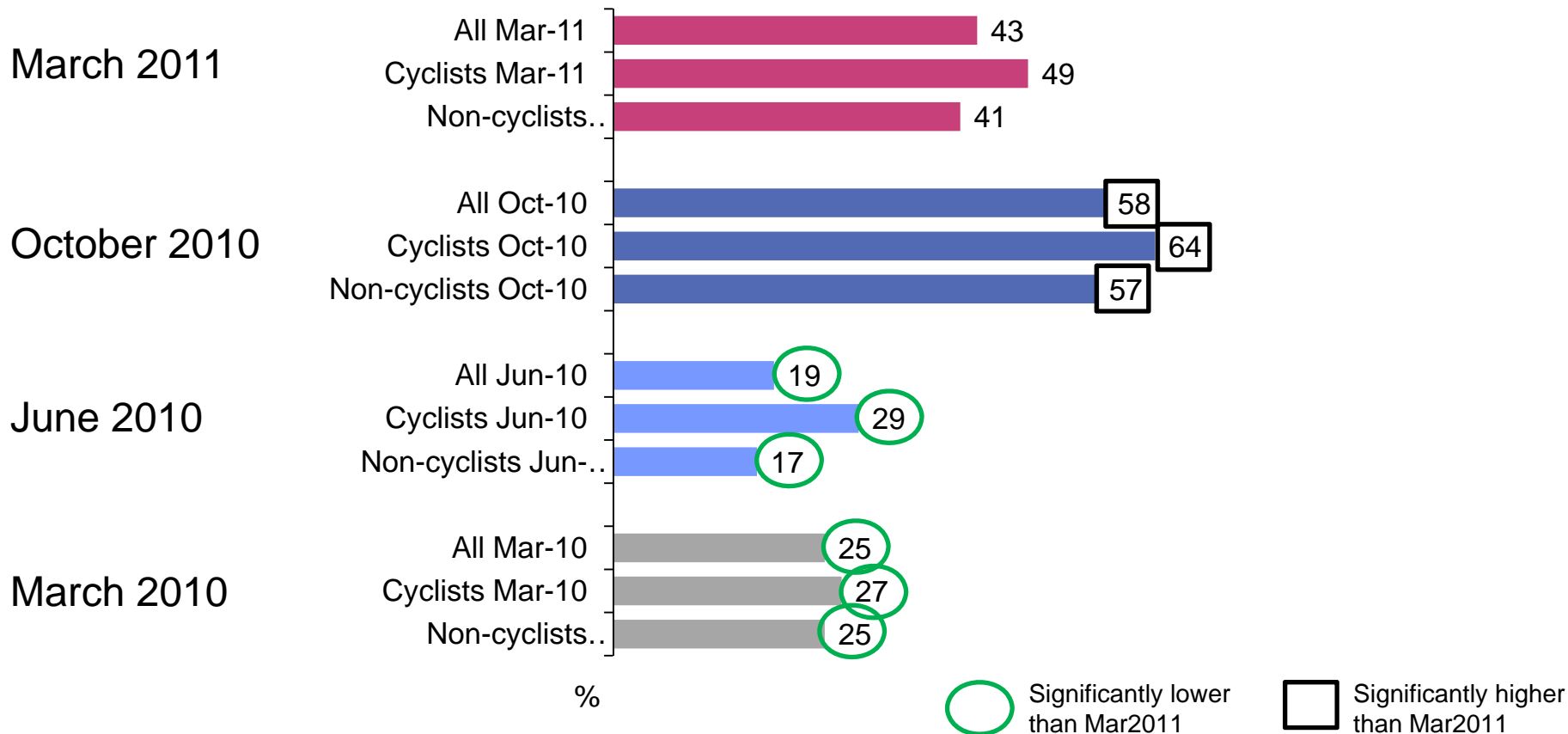
Data from other BCSH research ("BCSH scheme users survey 2010") has shown that although the majority of trips made are for commuting purposes (95% of those surveyed were making a commuting trip), two fifths of cyclists on the BCSH also used the routes for other journey purposes, the most common being social / recreational, visiting friends and relatives, shopping, and personal business.

48% of those who say they will use the Barclays Cycle Superhighways state that they would have been unlikely to cycle had the scheme not been launched. This has increased from 37% in October 2010.



There has been a significant decrease in awareness of Barclays Cycle Superhighways since October 2010, but awareness remains high compared with pre-launch levels

Awareness of Barclays Cycle Superhighway



QCHS3: Are you aware that Barclays Cycle Superhighways launched in London?

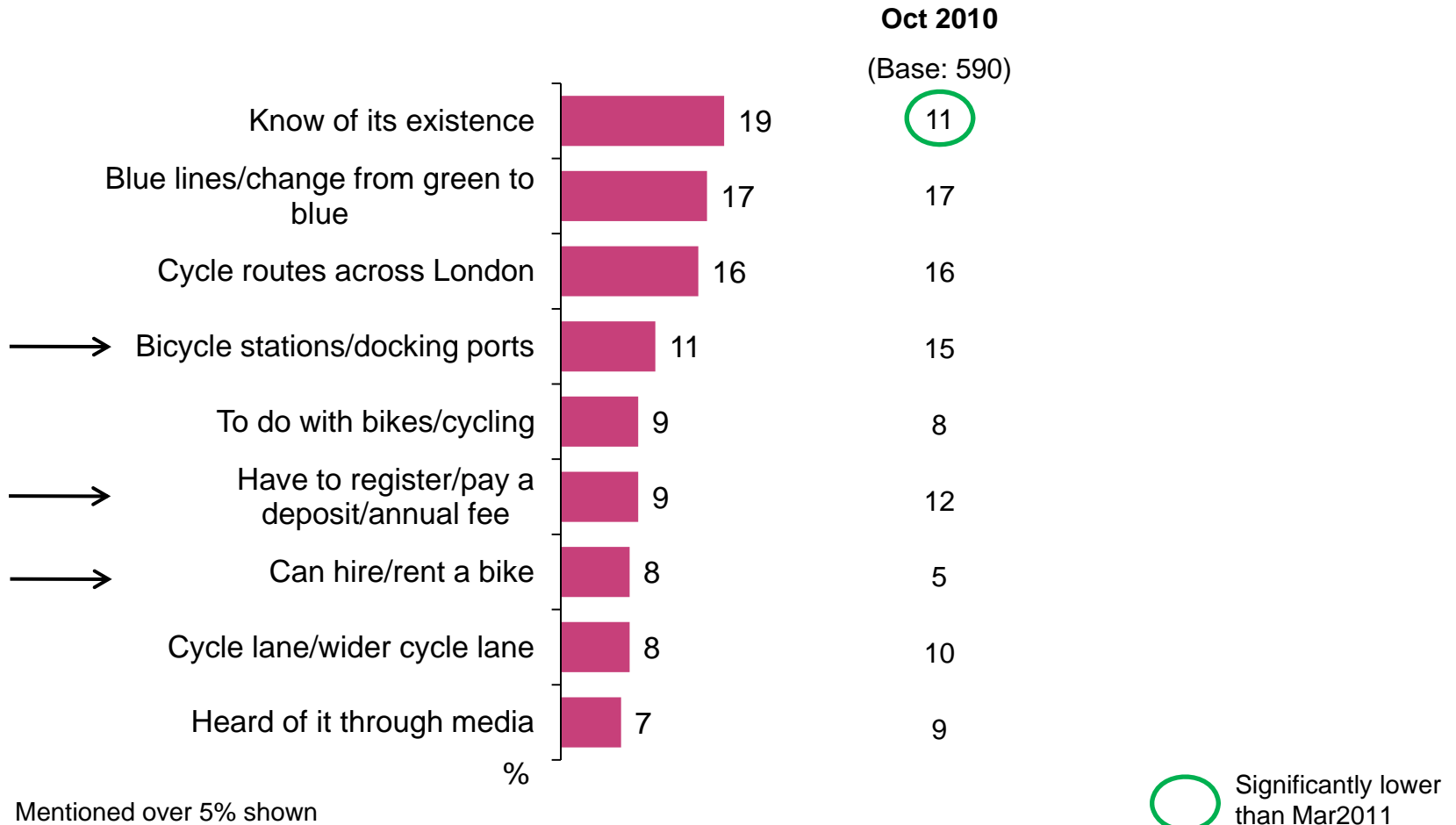
Base: All – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007)

Cyclists – Mar11 (176), Oct10 (182), June10 (170), Mar10 (156)

Non-cyclists – Mar11 (890), Oct10 (835), June10 (830), Mar10 (851)



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



QCHS4: What do you know about the Barclays Cycle Superhighways?
Base: those aware of Barclays Cycle Superhighways? (440)



Use of Barclays Cycle Superhighway

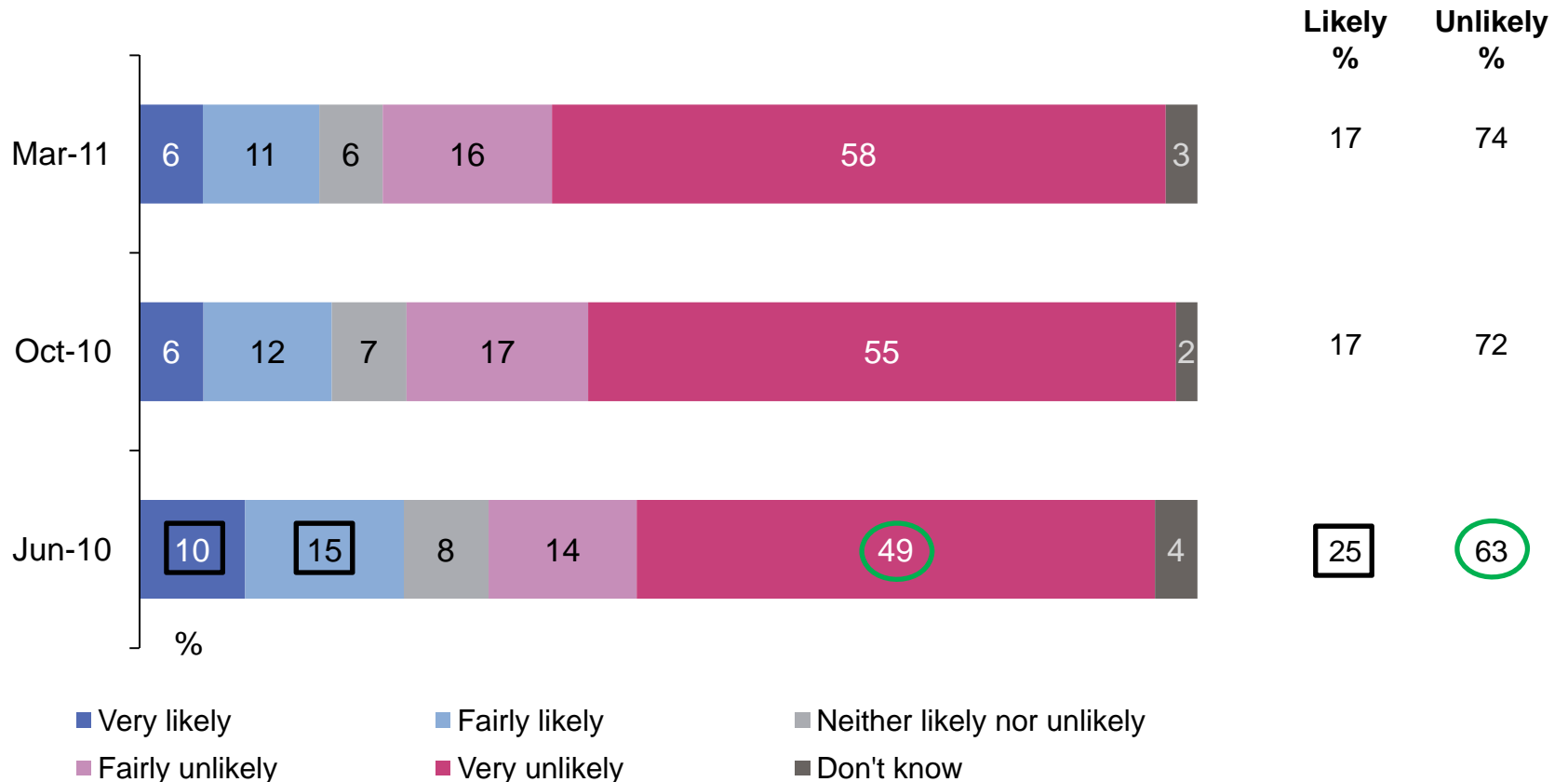
- 3% have used a Barclays Cycle Superhighway
- Equating to 23 people
- This was 4% (44 people) in October 2010

Demographic	Unweighted number (23)
Male	12
Female	11
16-34	7
35-54	12
55+	4
White	15
BAME	8
Working	17
Not working	6
AB	8
C1	10
C2	1
DE	4

Caution low base size



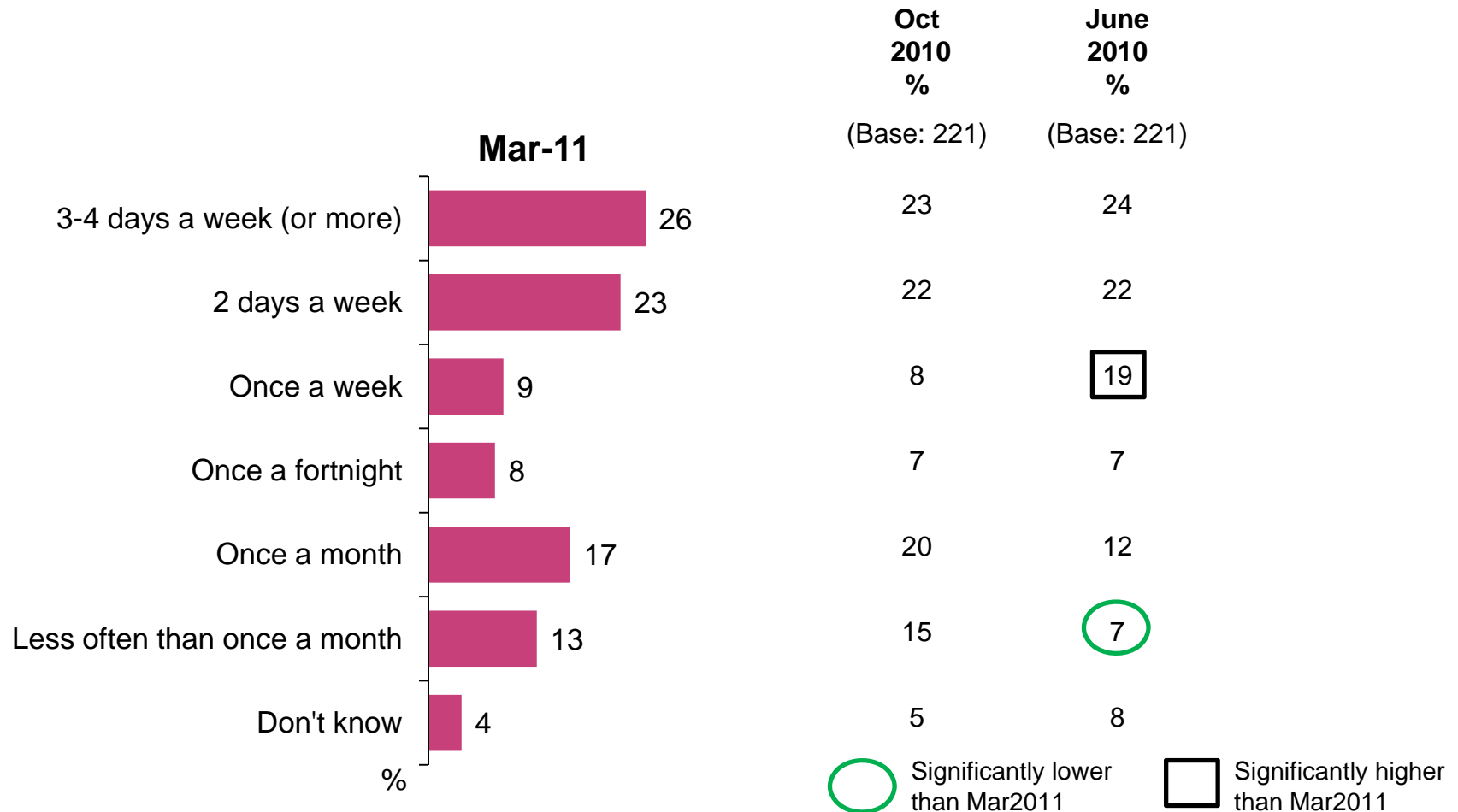
17% of non users anticipate that they will make journeys on Barclays Cycle Superhighways, in line with October 2010



QCHS5 How likely do you think it is that you will cycle on the Barclays Cycle Superhighways?
Would you say...
Base: those who have not used Barclays Cycle Superhighways yet, Mar11 (1,043), Oct10 (982), June10 (1,000)



Of those who say they will use Barclays Cycle Superhighways, 49% think they will use them at least twice a week

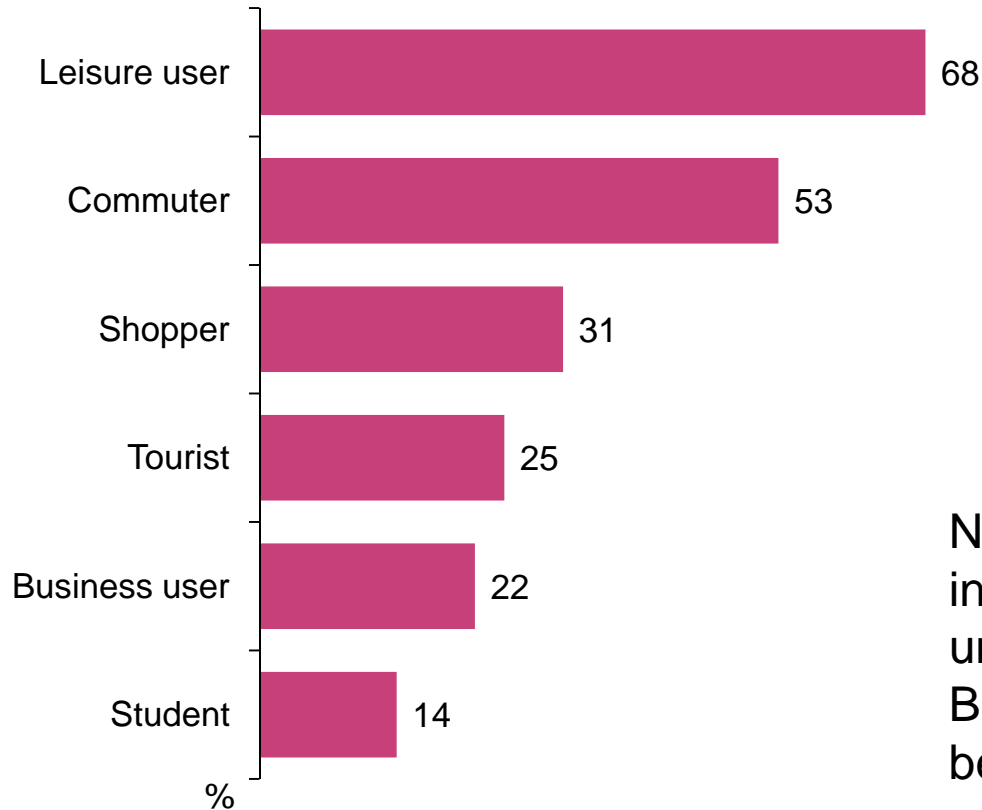


QCHS5a: Which of the following best describes how often you expect that you will make use of the Barclays Cycle Superhighways?

Base: all those who have used Barclays Cycle Superhighways or who are very/fairly likely to do so (177)



As with Barclays Cycle Hire, most anticipate their use of Barclays Cycle Superhighways will be for leisure



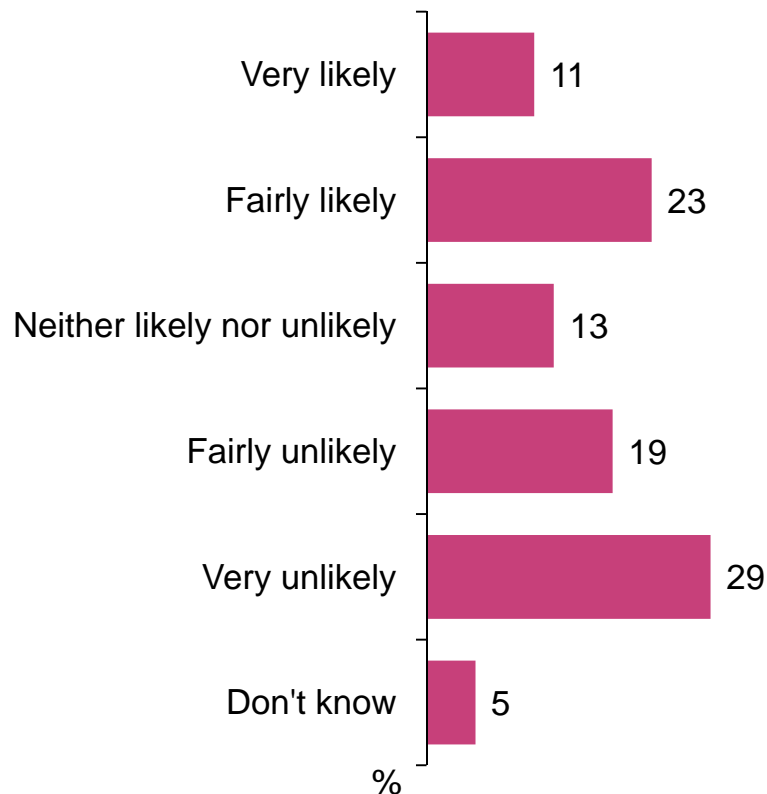
Note: those who incorrectly understood what BCSH meant have been excluded

QCHS5b: Will you be using the Barclays Cycle Superhighways as a ...?

Base: all those who have used Barclays Cycle Superhighway or who are very/fairly likely to do so and understand what BCSH is at CHS4 (What do you know about the Barclays Cycle Superhighways?) (79)



Almost half of those who have used (or say they will use) Barclays Cycle Superhighways say they would have been unlikely to cycle without the scheme



QCHS6: How likely would you have been to take up cycling in the next 12 months if the Barclays Cycle Superhighways had not been launched?

Base: all those who do not cycle but are likely to use the Superhighways, and those who have used the Superhighways (115)

Cycling events

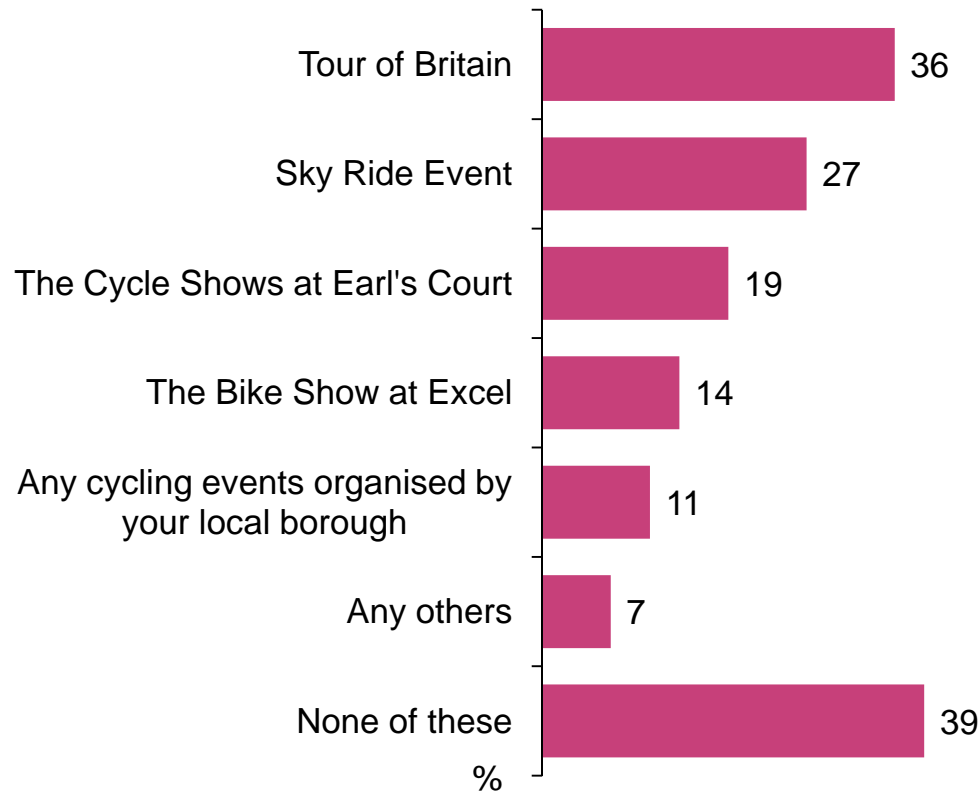
Cycling events

Tour of Britain and the Sky Ride Event remain the most commonly recognised cycling events with 36% and 27% aware of them respectively. 39% have not heard of any of the events mentioned.

Higher proportions claim they will attend various cycling events in the future than the proportions who report attending in the last 12 months. 10% claim they will attend the Sky Ride Event in the next year whilst 4% attended it last year. Expected attendance for Tour of Britain stands at 7% (compared to 4% who attended in 2010).



Tour of Britain and Sky Ride are the best recognised cycling events



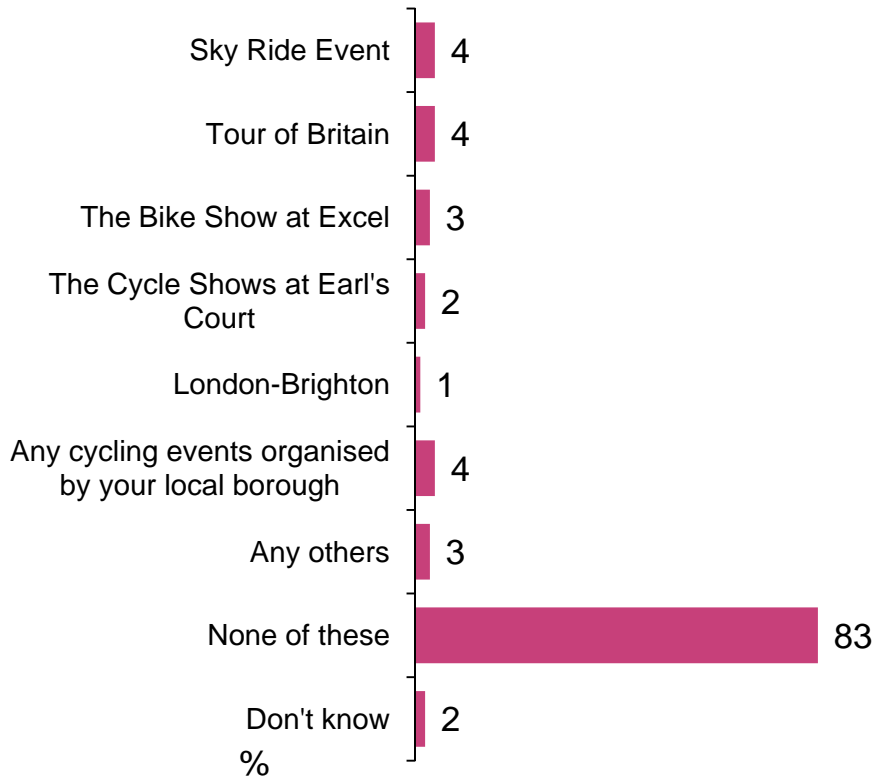
QCE1: Which of these cycling events in London over the last 12 months have you heard of?

Base: All (1,066)

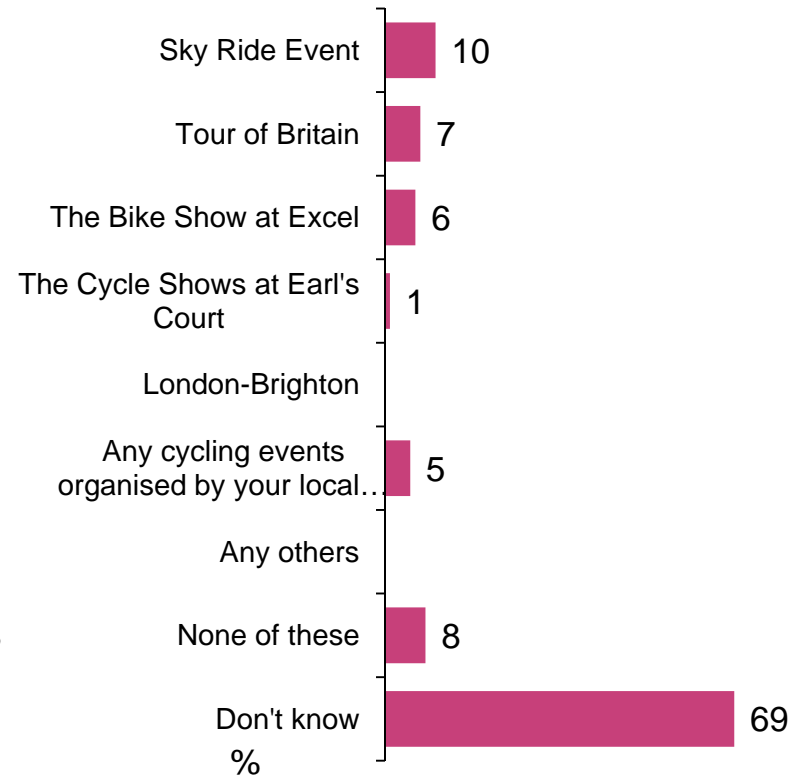


Reported future attendance is higher than actual past attendance for most cycling events

EVENTS ATTENDED IN LAST 12 MONTHS



EVENTS LIKELY TO ATTEND IN NEXT 12 MONTHS



QCE2: Which of the following events have you attended in London in the last 12 months?

QCE3: Which of these cycling events are you likely to attend in London in the next 12 months?

Base: All those aware of cycling events (645)

Cycle training

Cycle training

23% of Londoners have attended cycle training at some point in their lives, with the majority of these (62%) having done the old national Cycling Proficiency Test.

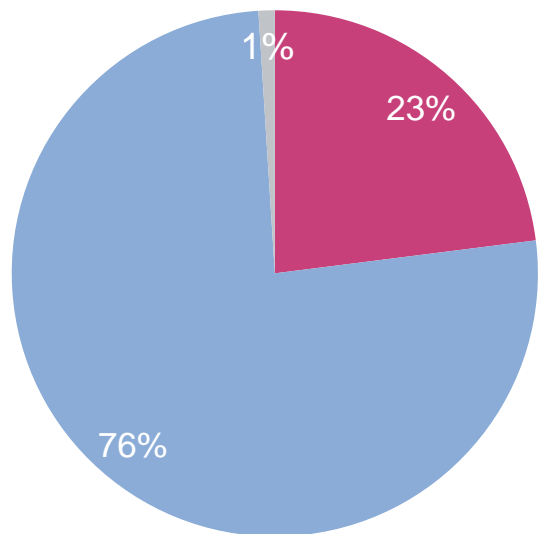
18% of those who have attended cycle training say it was provided by their local authority (61% said training was provided by their school, 6% arranged privately or through their employer). Of those who have not attended cycle training provided by a local authority, 23% are aware that their local authority offers cycle training for adults.

Cycle training increased the confidence of 76% of attendees. The training is reported to have a relatively low impact on cycling frequency, with a similar proportion saying they cycle less as a result (27%) of the training as those who say they cycle more (28%).



Around a quarter of Londoners have attended some type of cycle training – usually the old national Cycling Proficiency Test

CYCLE TRAINING ATTENDANCE

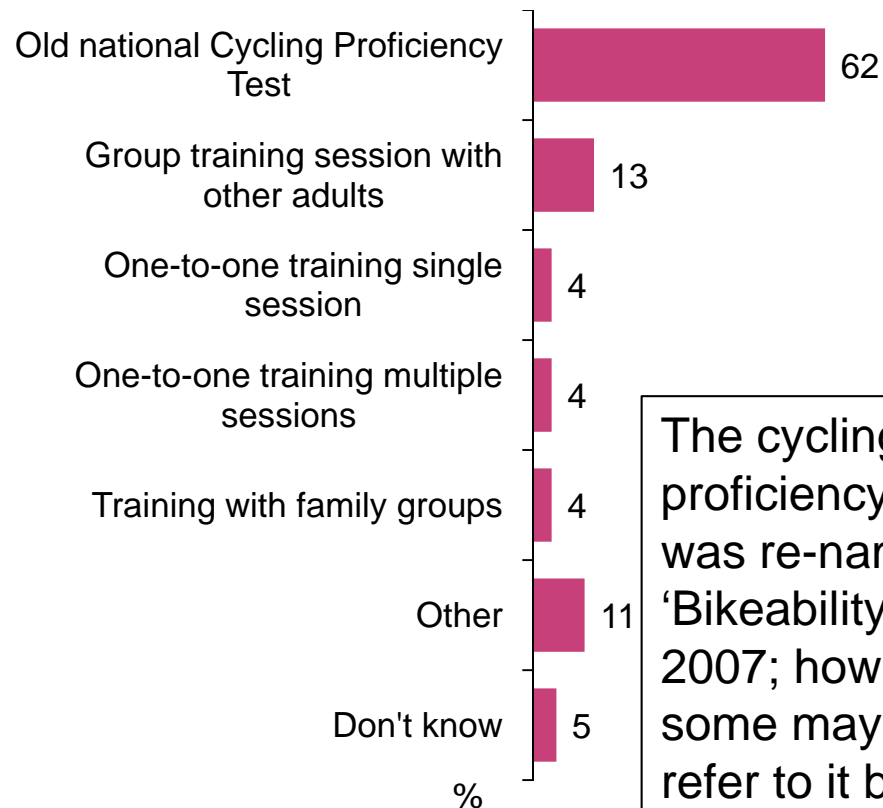


- Have attended training
- Have not attended training
- Don't know

QCT1: Have you ever attended any cycle training? Base: all (1,066)

QCT1a: What sort of cycle training did you have? Base: All those who have attended cycle training (246)

TYPE OF CYCLE TRAINING ATTENDED

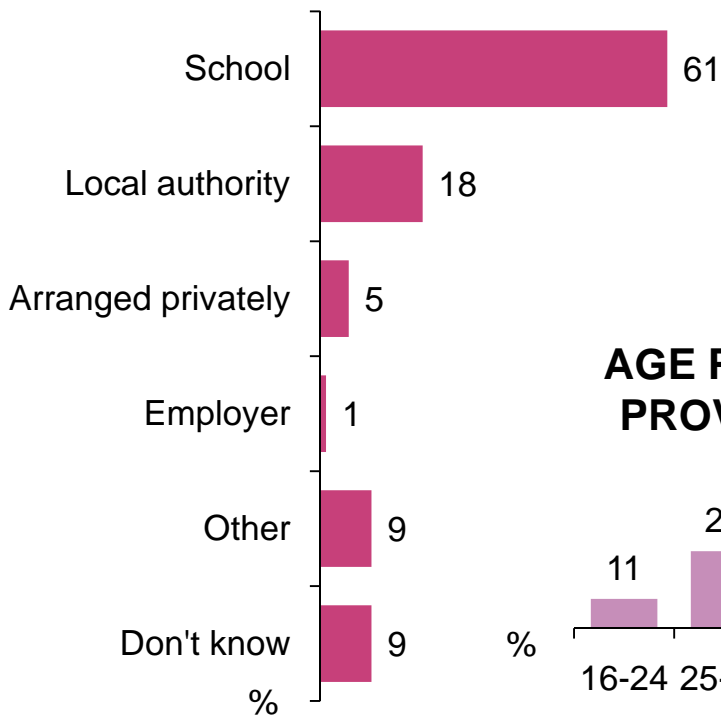


The cycling proficiency test was re-named 'Bikeability' in 2007; however some may still refer to it by the previous name

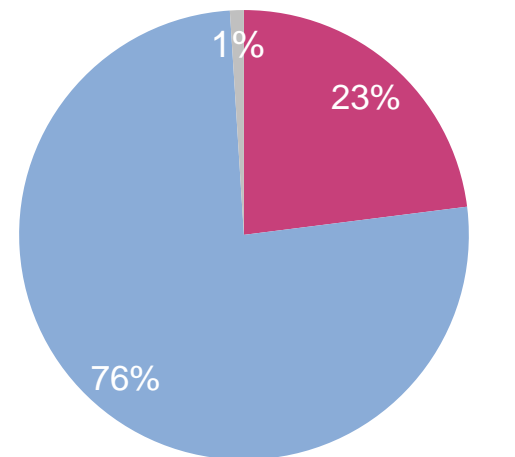


18% of those who have attended cycle training say it was provided by their local authority

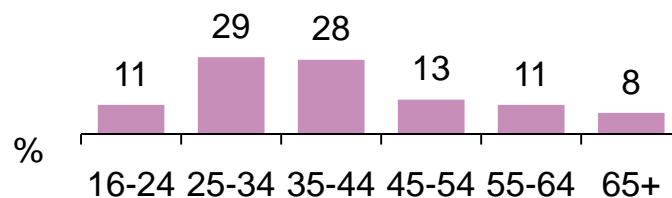
WHO PROVIDED THE CYCLE TRAINING



AWARENESS OF LOCAL COUNCIL ADULT CYCLE TRAINING



AGE PROFILE OF THOSE PROVIDED BY SCHOOL



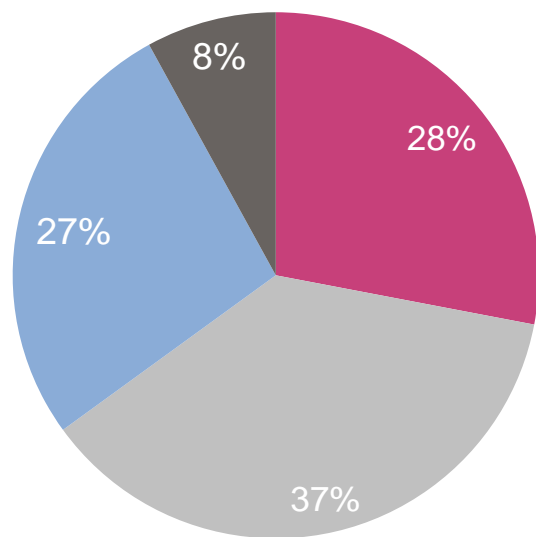
- Aware local Councils offer cycle training for adults
- Not aware local Councils offer cycle training for adults
- Don't know

QCT1b: Who provided the cycle training you have had? Base: all those who have attended cycle training (246) Training provided in a school (152) QCT1bb: Did you know most local Councils offer cyclist training for adults with a qualified instructor? Base: All except those who have attended cycle training provided by a local authority (1,018)



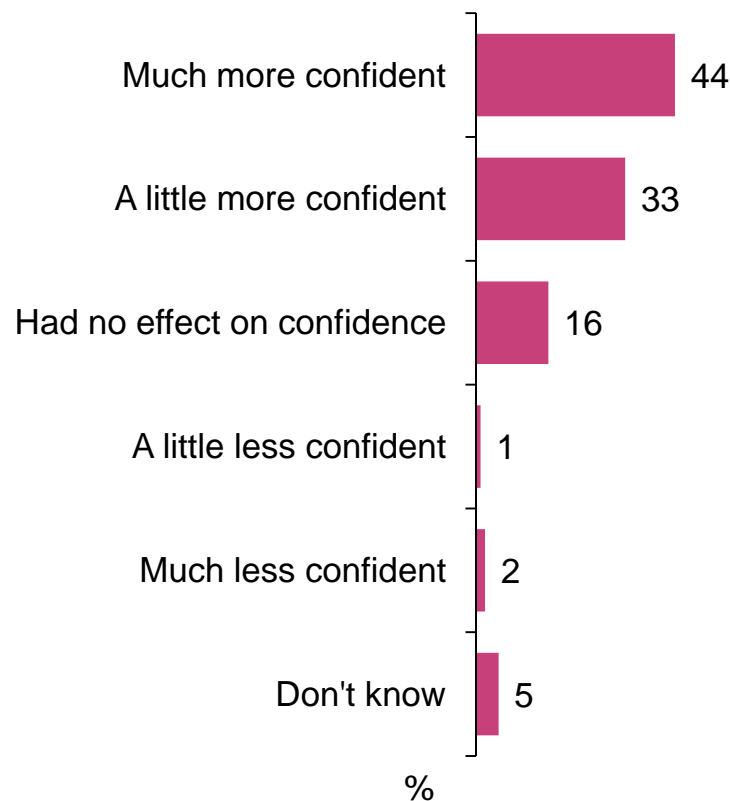
Cycle training increases confidence, but has a mixed impact on frequency of cycling

IMPACT OF CYCLE TRAINING ON FREQUENCY OF CYCLING



- More
- About the same
- Less
- Don't know

IMPACT OF CYCLE TRAINING ON CYCLING CONFIDENCE



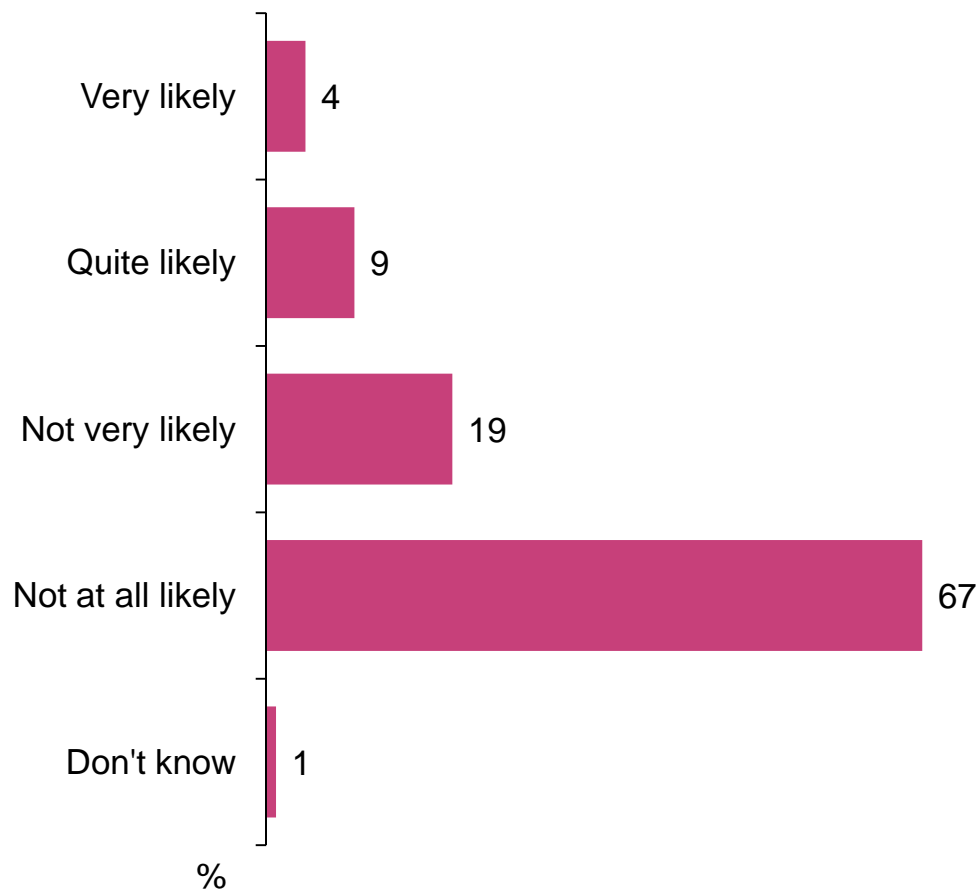
QTRAINING: As a result of taking cycle training, would you say you cycle more, less or about the same as before?

QCT1a1: What effect did this cycle training have on your cycling confidence?

Base: All those who have attended cycle training (246)



12% of Londoners say they are likely to attend cycle training in the next 12 months



QCT4: How likely are you to attend cycle training in the next 12 months?
Base: All those who have not attended cycle training in the last year (1,055)

APPENDIX

Appendix

Methodology

- The research comprised 1,066 telephone interviews with adult Londoners
- Fieldwork took place between 7 and 27 March 2011
- 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
- Average interview length was 26 minutes
- The final data set will be weighted back to be representative of Londoners in terms of age, gender, inner/outer London, ethnicity and working status according to 2001 census data

Appendix

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

Variable	%
Working status	
Working	60%
Not-working	39%
Social class	
A	7%
B	22%
C1	34%
C2	13%
D	8%
E	8%



The behavioural change model

The behavioural change model was updated in October 2010 to include fewer groupings.


The following tables show the March 2011 results for the previous version of the model.



Behaviour change model CYCLISTS Mar 2011

(demographics)

Possibility of cycling more	Stage	TOTAL %	Gender %		Age %						Ethnicity %		Social class %			
			M	F	16 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65 +	White	BAME	A B	C 1	C 2	D E
(Base)	-	167	96	71	18	35	49	36	17	12	135	32	57	63	18	15
You don't want to or would not consider doing this	Rejecter	5	5	4	17	-	3	8	-	12	6	4	2	7	-	9
You have never thought about doing this	Disengaged	2	2	2	11	-	2	-	-	6	*	10	2	3	-	4
You have given it some thought but are not going to do it	Rejecter	10	10	9	6	7	17	8	-	9	9	11	5	16	19	-
You are thinking about doing this	Primed	16	14	21	16	15	27	4	9	9	17	11	19	17	10	13
You have decided to do this (you have just decided but not yet started to do anything about it)	Triggered	8	8	8	11	6	7	12	12	-	5	17	6	3	15	26
You are setting things in place and, or, are seeking more information to do this	Preparation	4	3	7	6	6	-	7	5	6	4	4	5	2	-	4
You have started to do this but are finding it difficult	Sustaining but with difficulty	3	3	3	-	2	5	3	10	-	3	2	4	2	-	7
You have started to do this and are finding it easy	Sustaining successfully	6	4	8	-	5	6	13	4	-	6	3	6	7	5	-
You are already doing this and will continue to do so	Normalised	39	42	32	33	48	28	37	53	52	39	39	41	40	36	35
You were doing this but couldn't stick to it	Lapsed	7	7	5	-	11	6	8	7	-	9	-	10	3	15	-

 Significantly higher than total

Caution low base sizes

QCYCMOR1: Thinking about the possibility of "cycling more", which of these descriptions would you say MOST applies to you?

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



Regular cyclists are significantly more likely to be ‘normalised’

Possibility of cycling more	Stage	TOTAL %	Regular cyclists %	Occasional cyclists %
(Base)	-	n=167	n=115	n=52
You don't want to or would not consider doing this	Rejecter	5	4	9
You have never thought about doing this	Disengaged	2	1	6
You have given it some thought but are not going to do it	Rejecter	10	8	12
You are thinking about doing this	Primed	16	16	15
You have decided to do this (you have just decided but not yet started to do anything about it)	Triggered	8	8	8
You are setting things in place and, or, are seeking more information to do this	Preparation	4	2	9
You have started to do this but are finding it difficult	Sustaining but with difficulty	3	3	3
You have started to do this and are finding it easy	Sustaining successfully	6	5	7
You are already doing this and will continue to do so	Normalised	39	48	16
You were doing this but couldn't stick to it	Lapsed	7	4	13



Significantly lower than total



Significantly higher than total

QCYCMOR1: Thinking about the possibility of “cycling more”, which of these descriptions would you say MOST applies to you?

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



Behaviour model has remained steady over time amongst non-cyclists

NON-CYCLISTS (trend)

Possibility of taking up cycling	Stage	Mar 2010 %	June 2010 %	Oct 2010 %	Mar 2011 %
You don't want to or would not consider doing this	Rejecter	31	30	27	26
You have never thought about doing this	Disengaged	9	9	10	8
You have given it some thought but are not going to do it	Rejecter	26	28	25	26
You are thinking about doing this	Primed	17	14	17	15
You have decided to do this (you have just decided but not yet started to do anything about it)	Triggered	2	2	4	5
You are setting things in place and, or, are seeking more information to do this	Preparation	2	2	2	1
You have started to do this but are finding it difficult	Sustaining but with difficulty	2	3	1	3
You have started to do this and are finding it easy	Sustaining successfully	<1	2	<1	1
You are already doing this and will continue to do so	Normalised	3	3	3	4
You were doing this but couldn't stick to it	Lapsed	4	5	7	7

QTAKEUP1: Thinking about the possibility of "taking up cycling", which of these descriptions would you say MOST applies to you?

Base: Non-cyclists and those who have cycled around London but not in the last 12 months, Mar11 (899), Oct10 (842), June10 (832), Mar10 (859)



Behaviour change model NON-CYCLISTS Mar 2011

(demographics)

Possibility of taking up cycling	Stage	TOTAL %	Gender %		Age %						Ethnicity %		Social class %			
			M	F	16-24	25-34	35-44	45-54	55-64	65+	White	BAME	AB	C1	C2	DE
(Base)	-	899	310	589	103	142	160	154	137	203	648	244	255	301	123	165
You don't want to or would not consider doing this	Rejecter	26	23	29	15	14	20	28	29	55	30	18	27	26	24	29
You have never thought about doing this	Disengaged	8	6	9	9	10	10	6	4	6	7	11	6	7	8	8
You have given it some thought but are not going to do it	Rejecter	26	24	28	24	36	27	25	30	14	28	23	30	29	31	17
You are thinking about doing this	Primed	15	17	14	22	19	20	17	10	3	12	23	13	17	17	13
You have decided to do this (you have just decided but not yet started to do anything about it)	Triggered	5	6	4	8	6	5	5	3	2	4	6	6	4	3	8
You are setting things in place and, or, are seeking more information to do this	Preparation	1	1	2	1	3	2	1	1	<1	1	3	2	2	1	<1
You have started to do this but are finding it difficult	Sustaining but with difficulty	3	3	2	2	2	5	2	4	1	2	3	3	4	-	2
You have started to do this and are finding it easy	Sustaining successfully	1	1	<1	2	1	-	1	1	-	1	1	1	1	-	2
You are already doing this and will continue to do so	Normalised	4	4	2	6	3	5	5	3	2	4	3	3	3	8	2
You were doing this but couldn't stick to it	Lapsed	7	9	5	8	3	4	9	12	10	8	6	7	4	7	14

QTAKEUP1: Thinking about the possibility of "taking up cycling", which of these descriptions would you say MOST applies to you?

Base: Non-cyclists and those who have cycled around London but not in the last 12 months (899)



Significantly lower than total

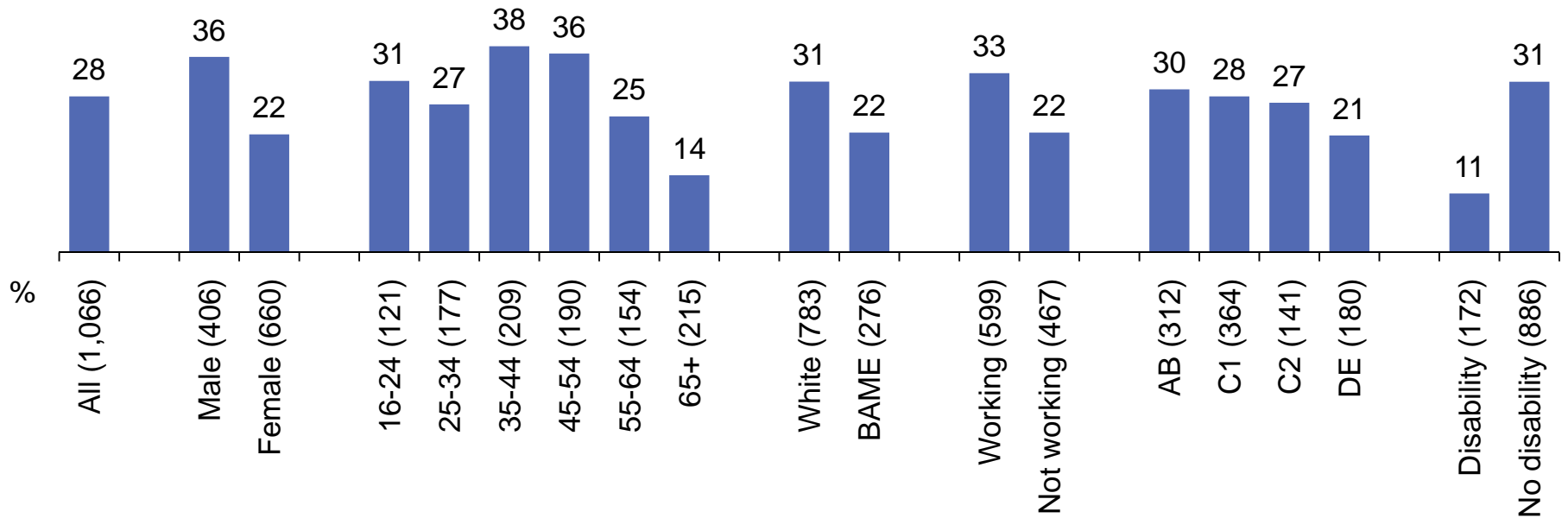


Significantly higher than total



A third of Londoners own a bike; more likely to be male and/or working

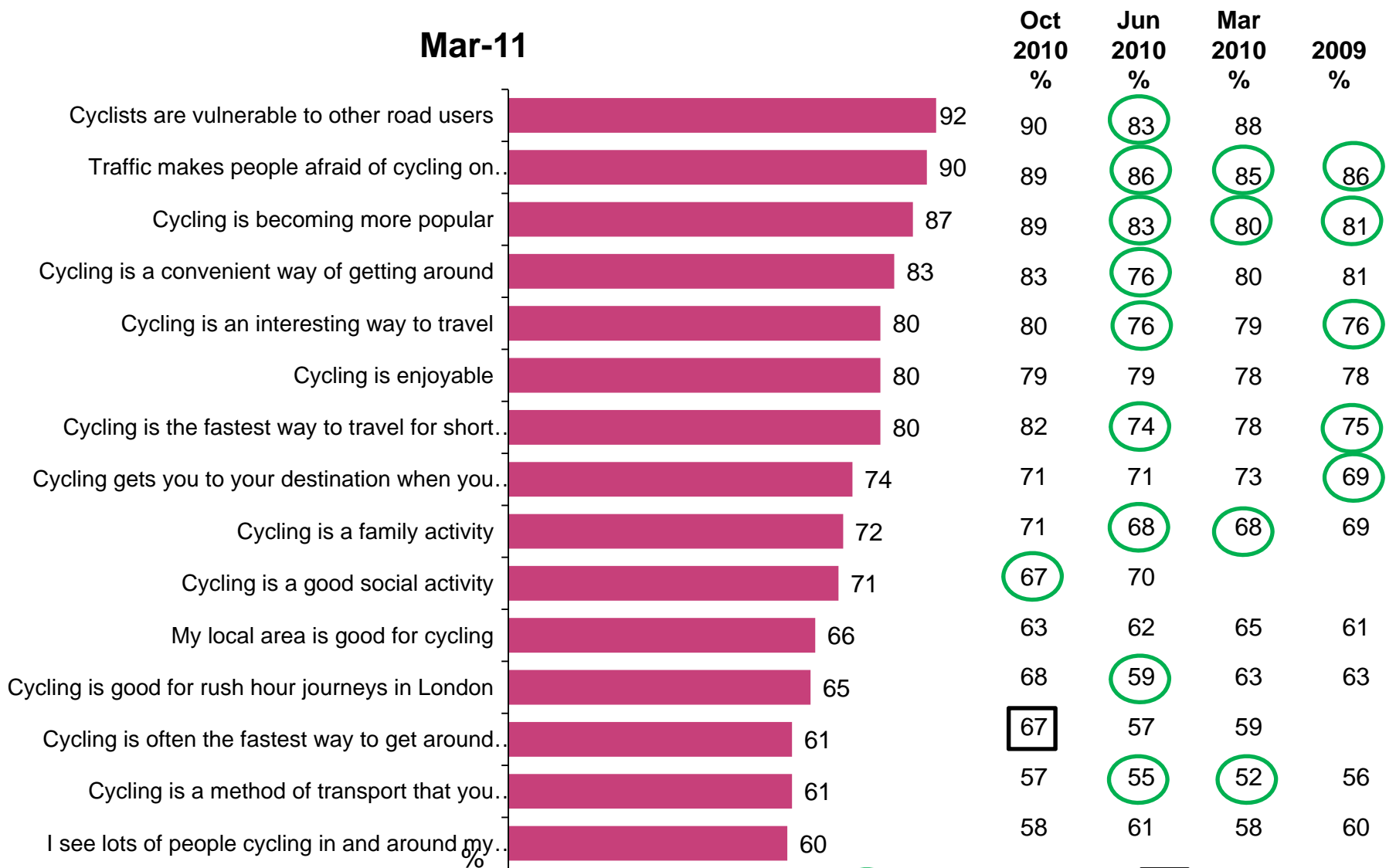
Bike ownership



QVACCESS c: Can you tell me about the ownerships/use of the bicycle. Would you say...?

Base: All

Attitudes towards cycling in London



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

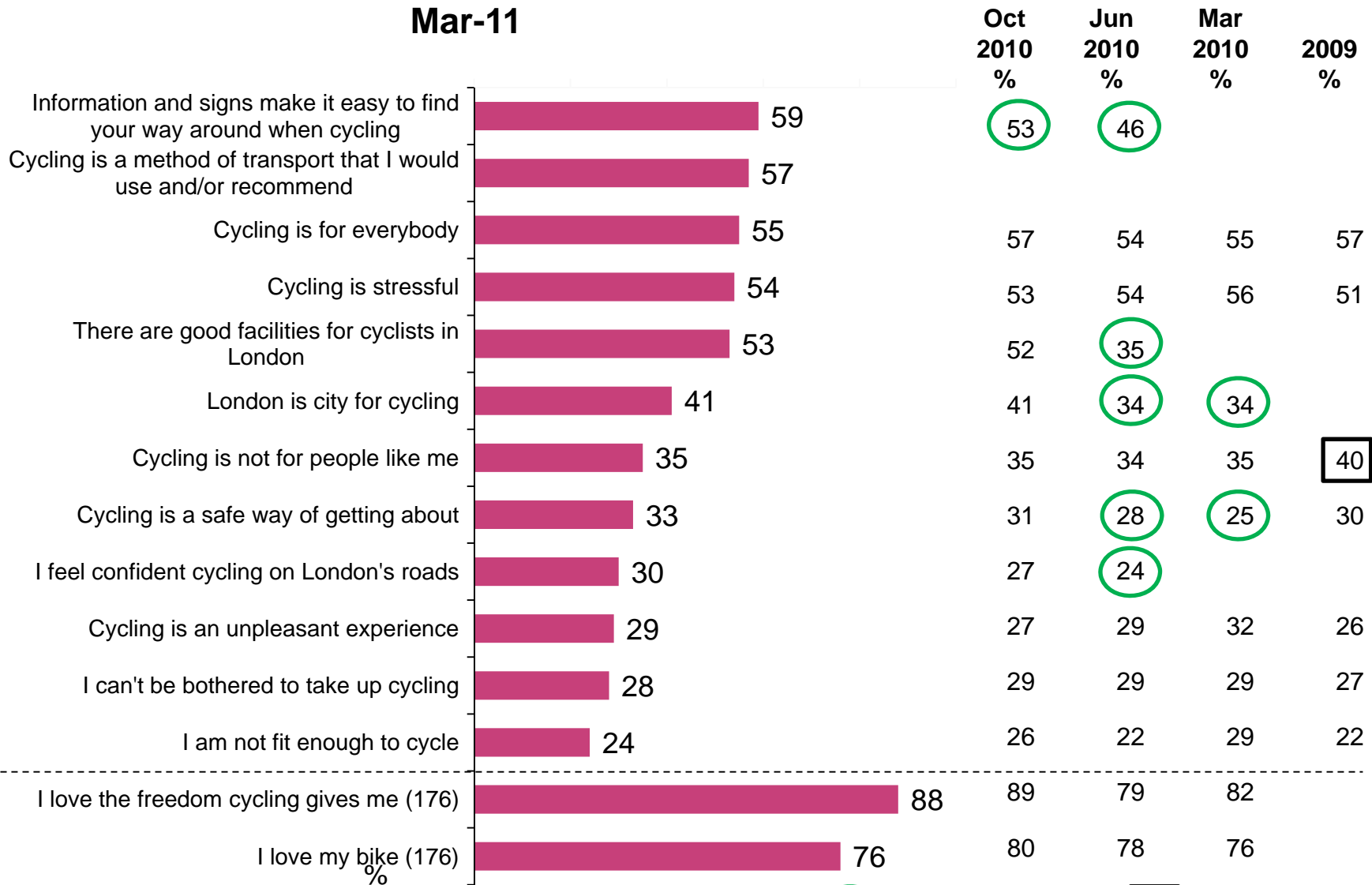
Base: All – Mar11 (1,066), Oct 10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004)

○ Significantly lower than Mar2011

□ Significantly higher than Mar2011

Attitudes towards cycling in London

Mar-11



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 – Mar11 (1,066), Oct 10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004)

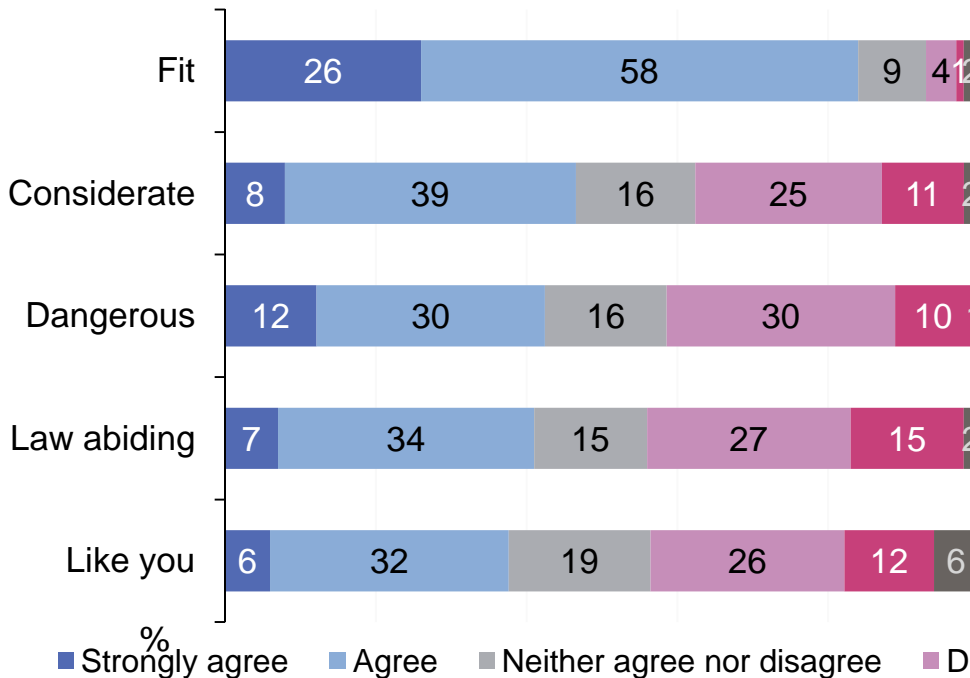
○ Significantly lower than Mar2011

□ Significantly higher than Mar2011



Cyclists are less likely to be regarded as dangerous since the summer

Attitudes towards cyclists



	Mar 2011 %		Oct 2010 %		June 2010 %		Mar 2010 %	
	Net agree	Net disagree	Net agree	Net disagree	Net agree	Net disagree	Net agree	Net disagree
Fit	84	5	86	4	82	5	84	5
Considerate	46	36	43	36	41	37	39	38
Dangerous	42	40	39	43	50	31	51	32
Law abiding	41	42	37	43	36	42	36	43
Like you	37	38	34	39	38	35	38	34

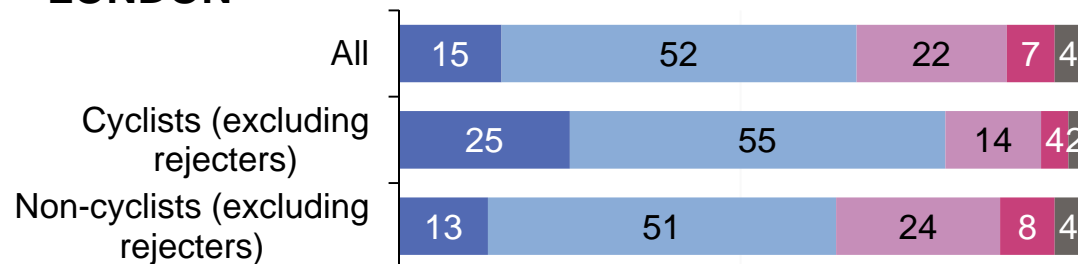
 Significantly lower than Mar2011
 Significantly higher than Mar2011

QC5g: Do you feel that cyclists in general are xxx?
 Base: All – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007)

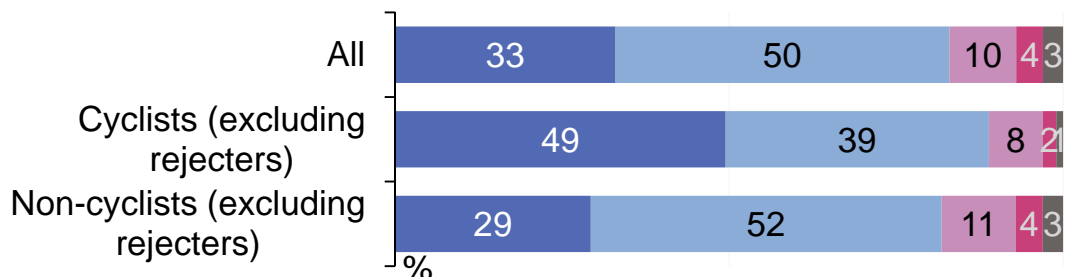
Significantly more Londoners, and non-cyclists, consider London's streets safe in the daytime than in March and June 2010

DURING THE DAYTIME

LONDON



LOCAL AREA



■ Very safe ■ Quite safe ■ Not very safe ■ Not at all safe ■ Don't know

Mar 2011 %		Oct 2010 %		June 2010 %		March 2010 %	
Safe	Not safe	Safe	Not safe	Safe	Not safe	Safe	Not safe
67	29	68	27	54	40	60	33
80	18	79	20	74	23	79	17
64	32	71	27	56	39	64	31
<hr/>							
83	14	82	15	75	20	78	16
89	10	90	10	86	13	95	4
82	15	82	16	77	18	81	14

○ Significantly lower than Mar2011

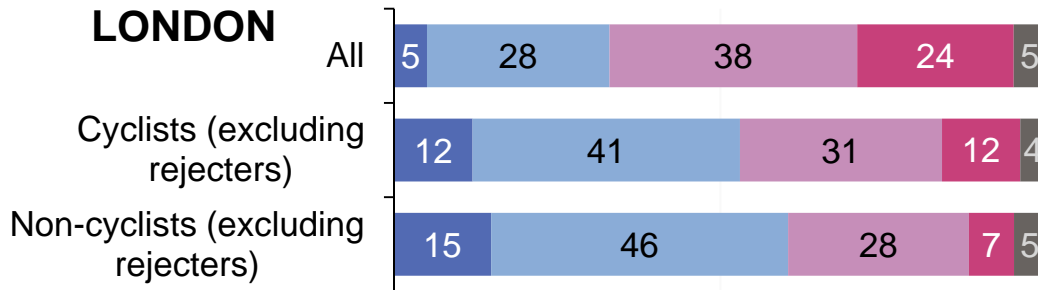
□ Significantly higher than Mar2011

QC13a/b/aa/ba: Thinking about cycling in xxx during the daytime/at night, how safe from crime or anti-social behaviour do you feel? Base: All – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007); Cyclists excl. rejecters – Mar11 (176), Oct10 (149), June10 (141), Mar10 (127); Non-cyclists excl. rejecters – Mar11 (890) Oct10 (309), June10 (288), Mar10 (304)

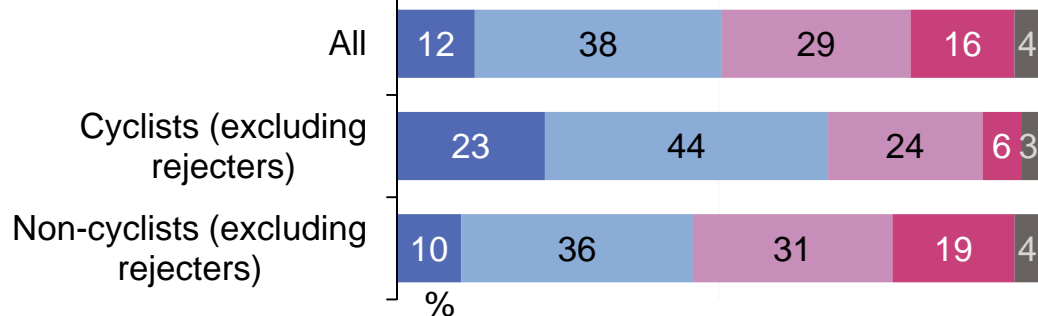
Londoners now feel safer around London at night than in early 2010

AT NIGHT

LONDON



LOCAL AREA



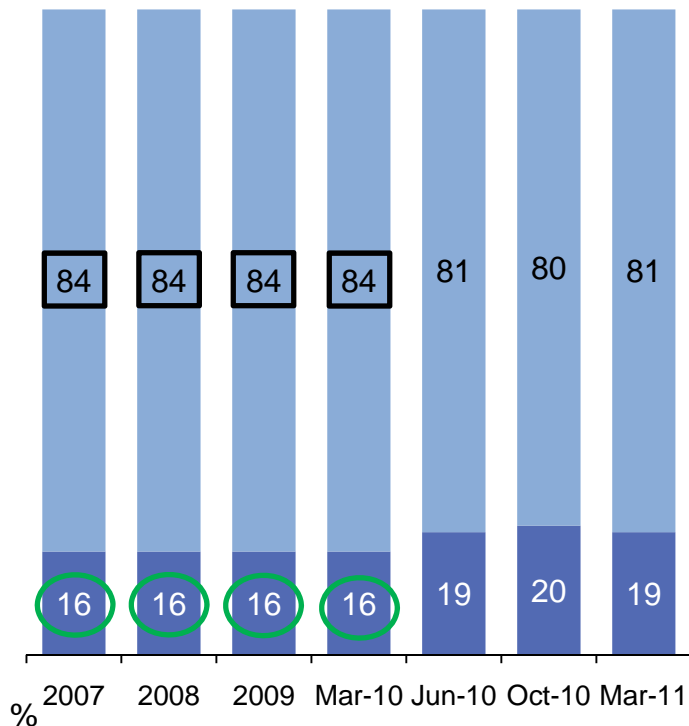
■ Very safe ■ Quite safe ■ Not very safe

	Mar 2011 %		Oct 2010 %		June 2010 %		Mar 2010 %	
	Safe	Not safe	Safe	Not safe	Safe	Not safe	Safe	Not safe
All	33	62	32	63	27	65	28	63
Cyclists (excluding rejecters)	54	42	53	43	49	48	60	35
Non-cyclists (excluding rejecters)	28	67	25	71	21	71	27	66
All (Local Area)	50	46	49	47	-	-	-	-
Cyclists (excluding rejecters) (Local Area)	67	30	67	31	-	-	-	-
Non-cyclists (excluding rejecters) (Local Area)	46	49	46	52	-	-	-	-

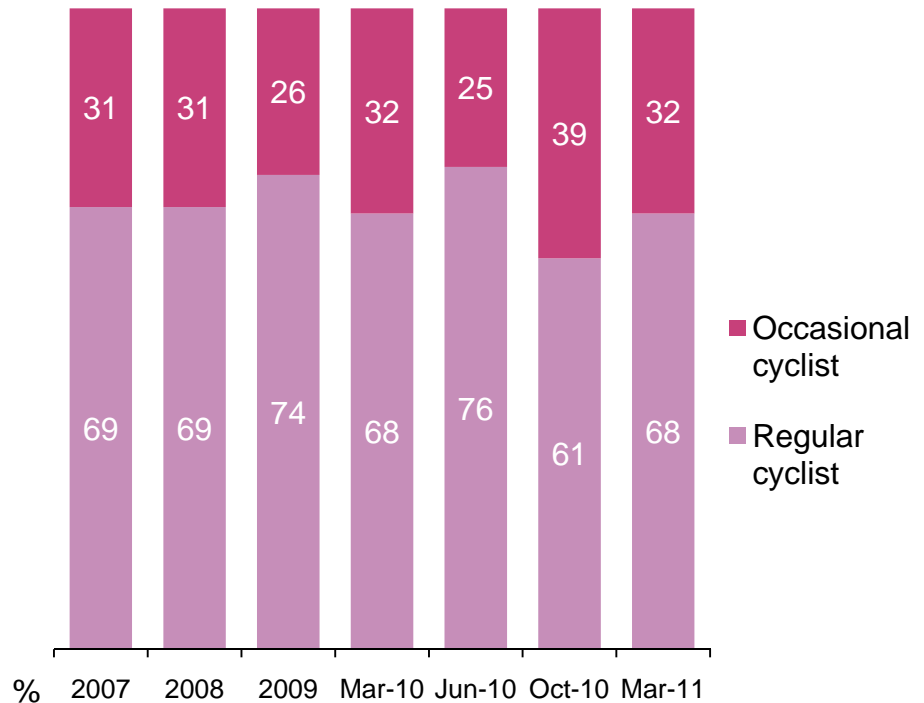
○ Significantly lower than Mar2011

QC13a/b/aa/ba: Thinking about cycling in xxx during the daytime/at night, how safe from crime or anti-social behaviour do you feel? Base: All – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007); Cyclists excl. rejecters – Mar11 (176), Oct10 (149), June10 (141), Mar10 (127); Non-cyclists excl. rejecters – Mar11 (890), Oct10 (309), June10 (288), Mar10 (304)

Significantly more Londoners cycle now compared with March 2010



■ Non-cyclist
■ Cyclist



■ Occasional cyclist
■ Regular cyclist

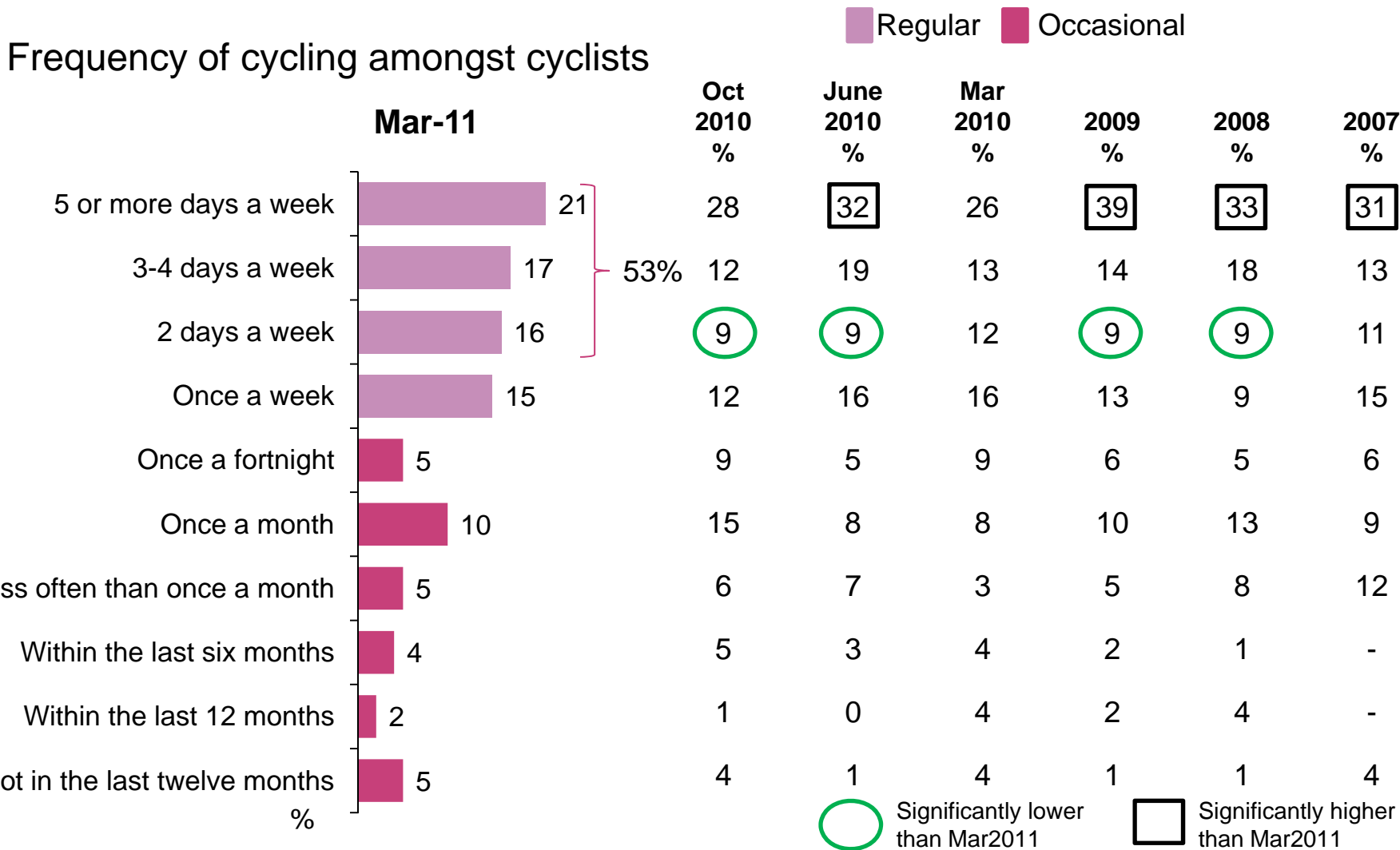
○ Significantly lower than Mar2011

□ Significantly higher than Mar2011

QFREQ: Which of these modes of transport do you ever use to get around London? Base: all – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208) QFREQ_BIKE: Typically, how often do you use a bicycle to get around London? Base: All cyclists – Mar11 (176), Oct10 (182), June10 (170), Mar10 (156), 2009 (164), 2008 (159), 2007 (189)



Amongst cyclists, one-in-five cycle five or more days a week. Significantly more cycle two or more days a week than the previous two waves however the proportion is in line with the same time last year



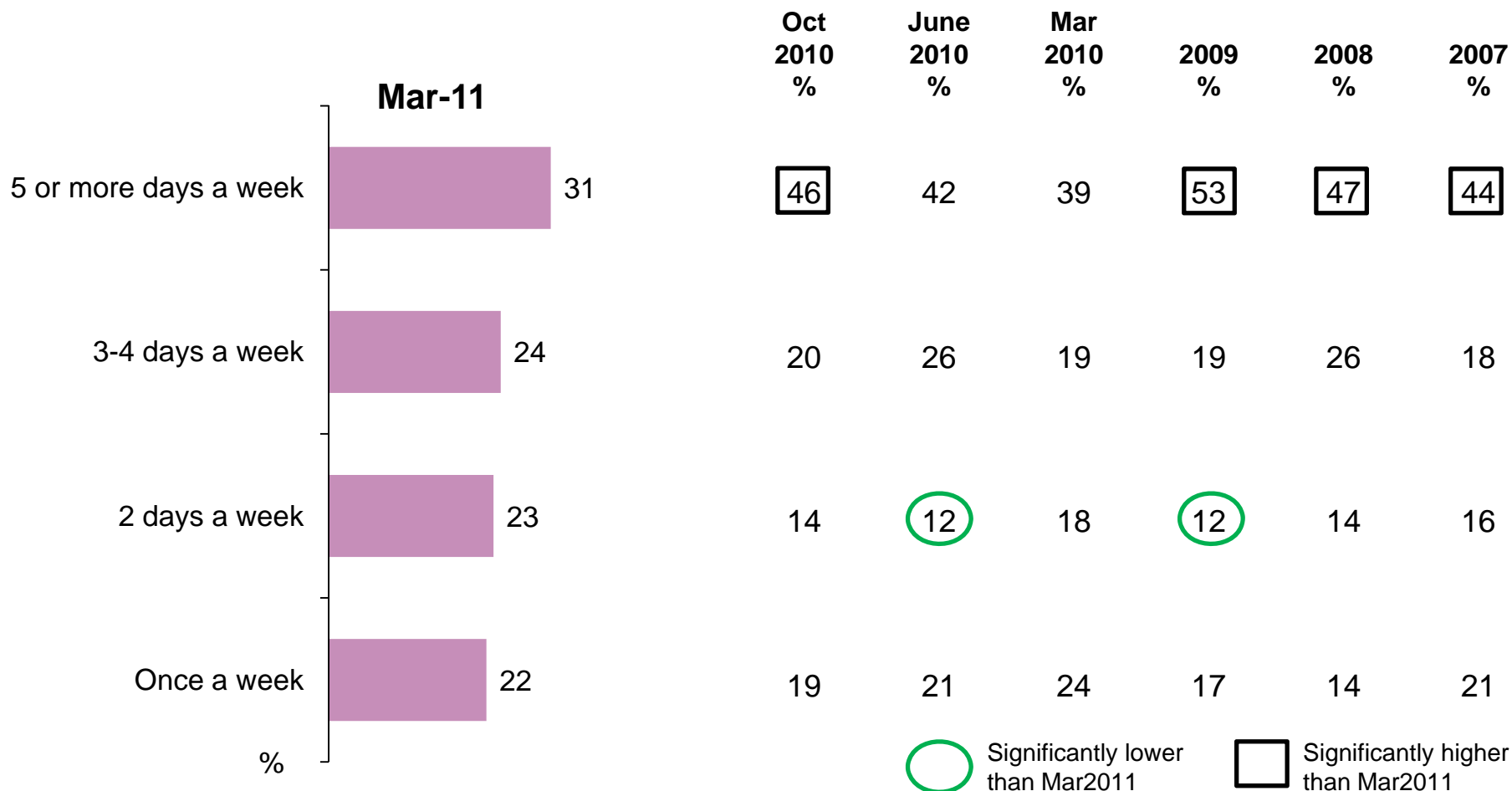
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

Base: All cyclists – Mar11 (176), Oct10 (182); June10 (170), Mar10 (156), 2009 (164), 2008 (159), 2007 (188)



Significantly fewer regular cyclists cycle five or more days a week this wave than in October 2010. However the level is consistent with this time last year

Frequency of cycling amongst regular cyclists (trend)



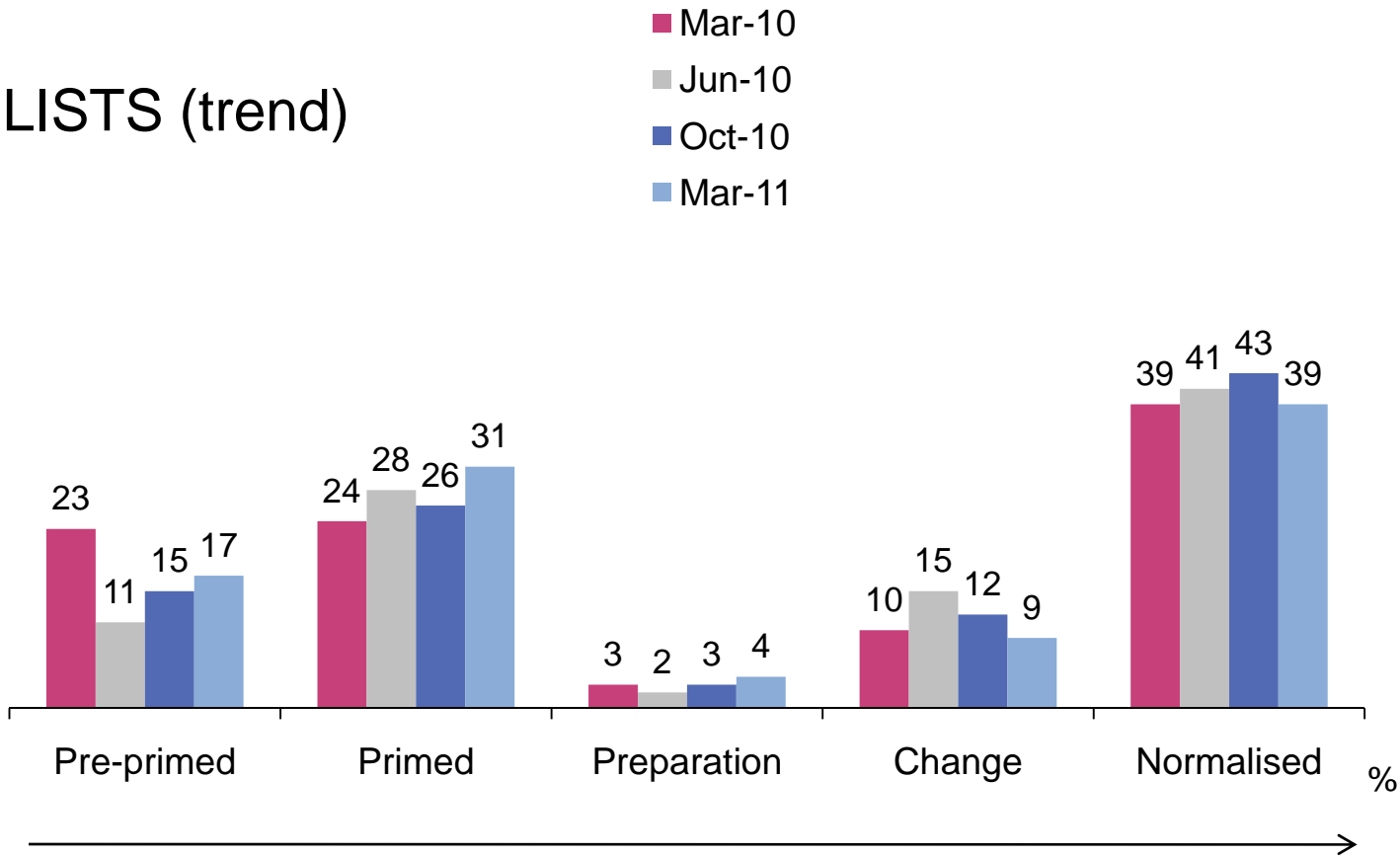
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

Base: Regular cyclists – Mar11 (115), Oct10 (113), June10 (127), Mar10 (107), 2009 (121), 2008 (110), 2007 (131)



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

CYCLISTS (trend)



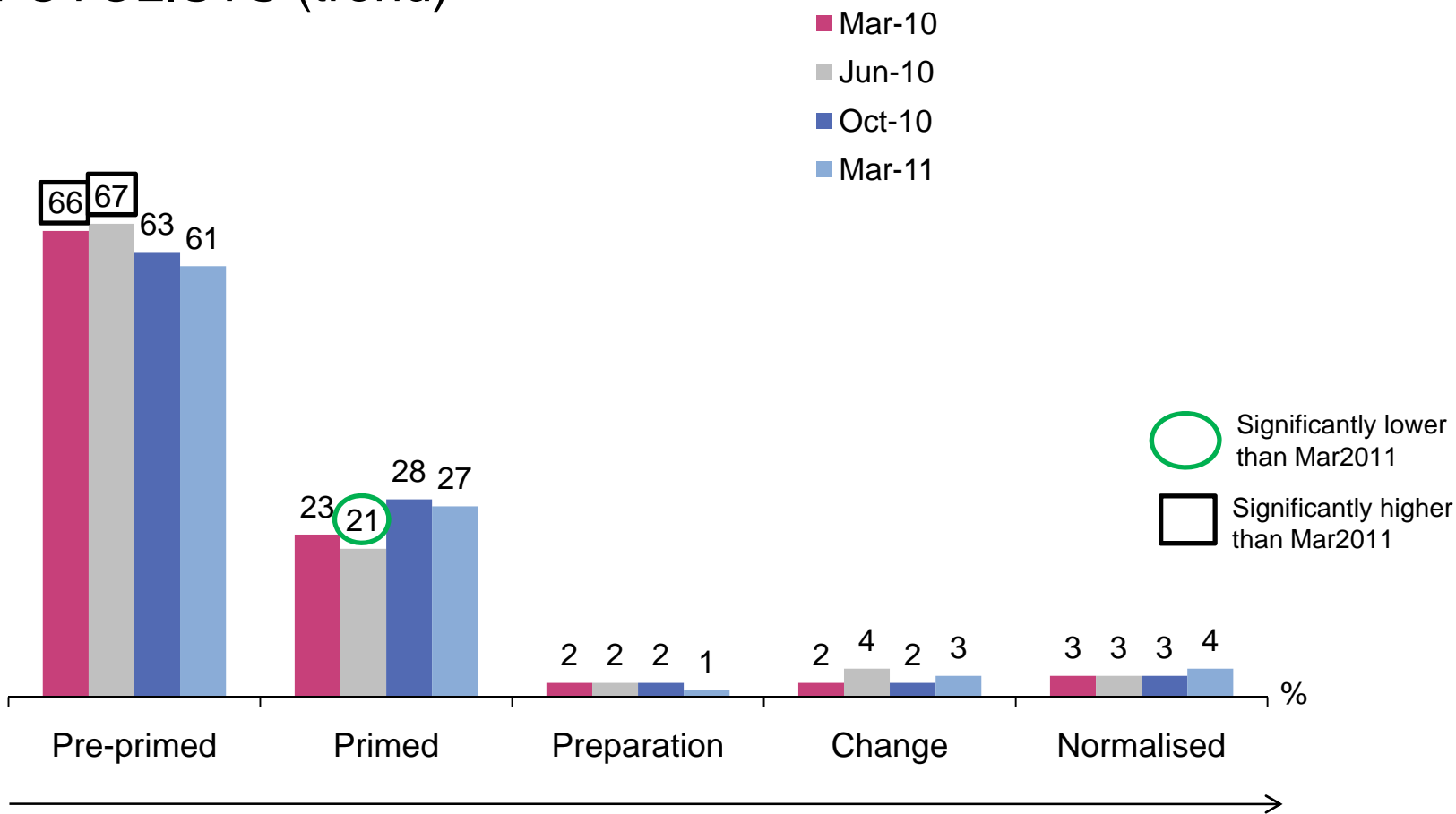
QCYCMOR1: Thinking about the possibility of "cycling more", which of these descriptions would you say MOST applies to you?

Base: Those who have cycled around London within the last 12 months, Mar11 (167) Oct10 (175), June10 (168), Mar10 (148)



The majority of non-cyclists are 'pre-primed' meaning they have decided against taking up cycling, have never thought of it, or have given it some thought but are not going to do it

NON-CYCLISTS (trend)



QTAKEUP1: Thinking about the possibility of "taking up cycling", which of these descriptions would you say MOST applies to you?

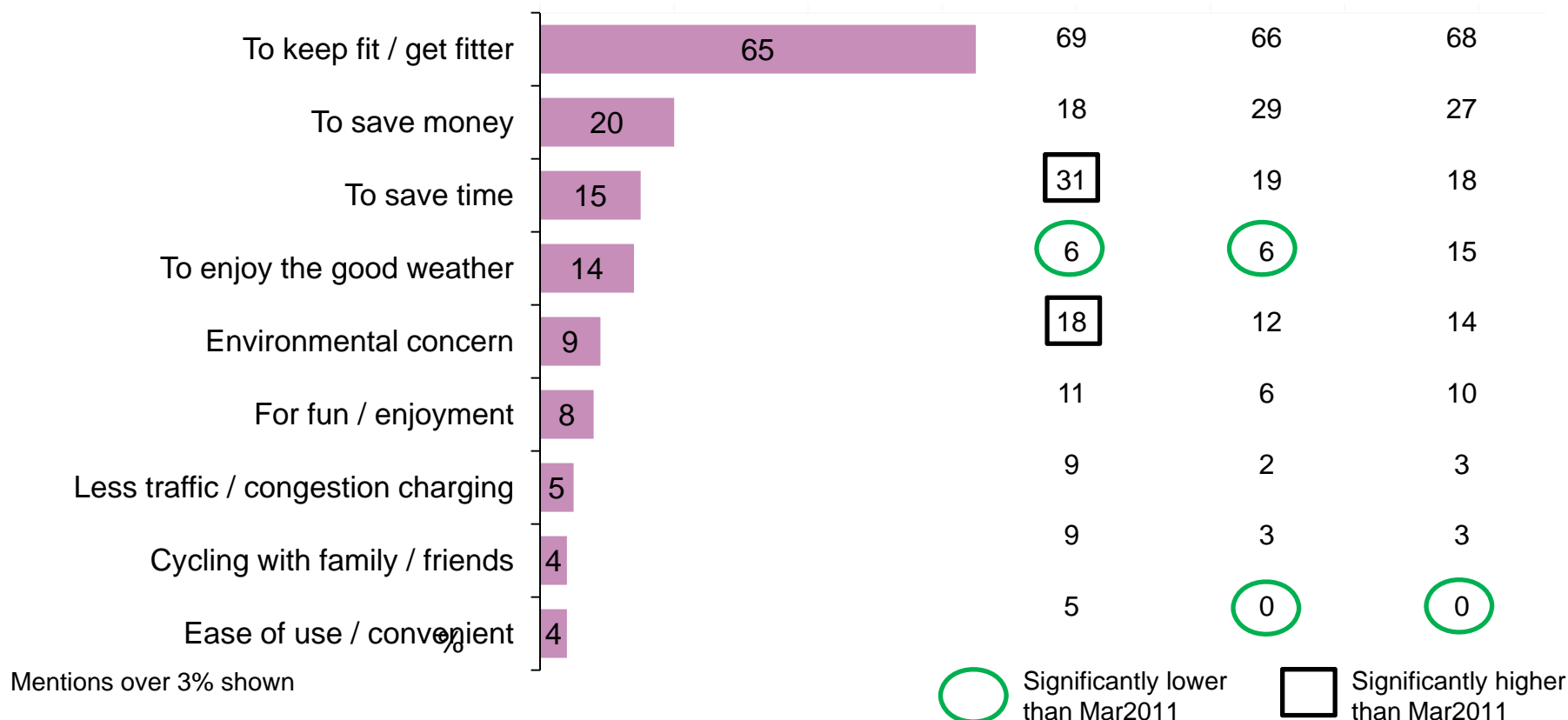
Base: Non-cyclists and those who have cycled around London but not in the last 12 months, Mar2011 (899), Oct10 (842), June10 (832), Mar10 (859)

Getting fit remains the strongest motivator for non-cyclists

Motivations for taking up cycling

PRIMED* AND PREPARATION
NON-CYCLISTS

Oct 2010 % (Base: 176) June 2010 % (Base: 136) Mar 2010 % (Base: 150)



QC3e: Mar11/Oct 2010 - Why are you considering taking up cycling?

June10 and Mar10 - Why do you say that it is likely you will take up cycling in the next 12 months?

Base: Those "thinking about...decided to...are setting things in place to..." take up cycling (175)

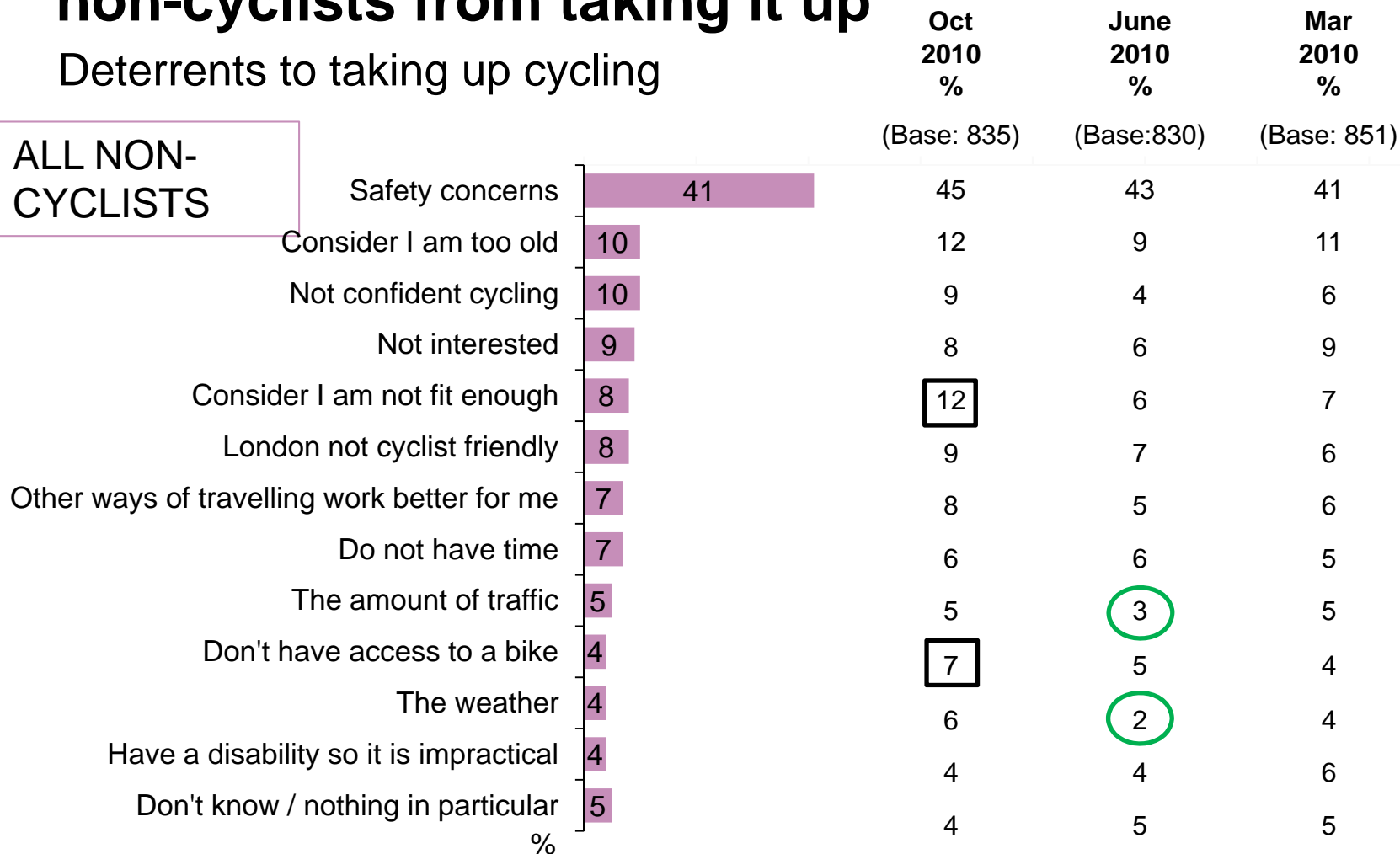
* Includes 'primed' individuals except those who 'were doing this but couldn't stick to it' at QTAKEUP1




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


Deterrents to taking up cycling

ALL NON-CYCLISTS



Responses over 3% shown

 Significantly lower than Mar2011

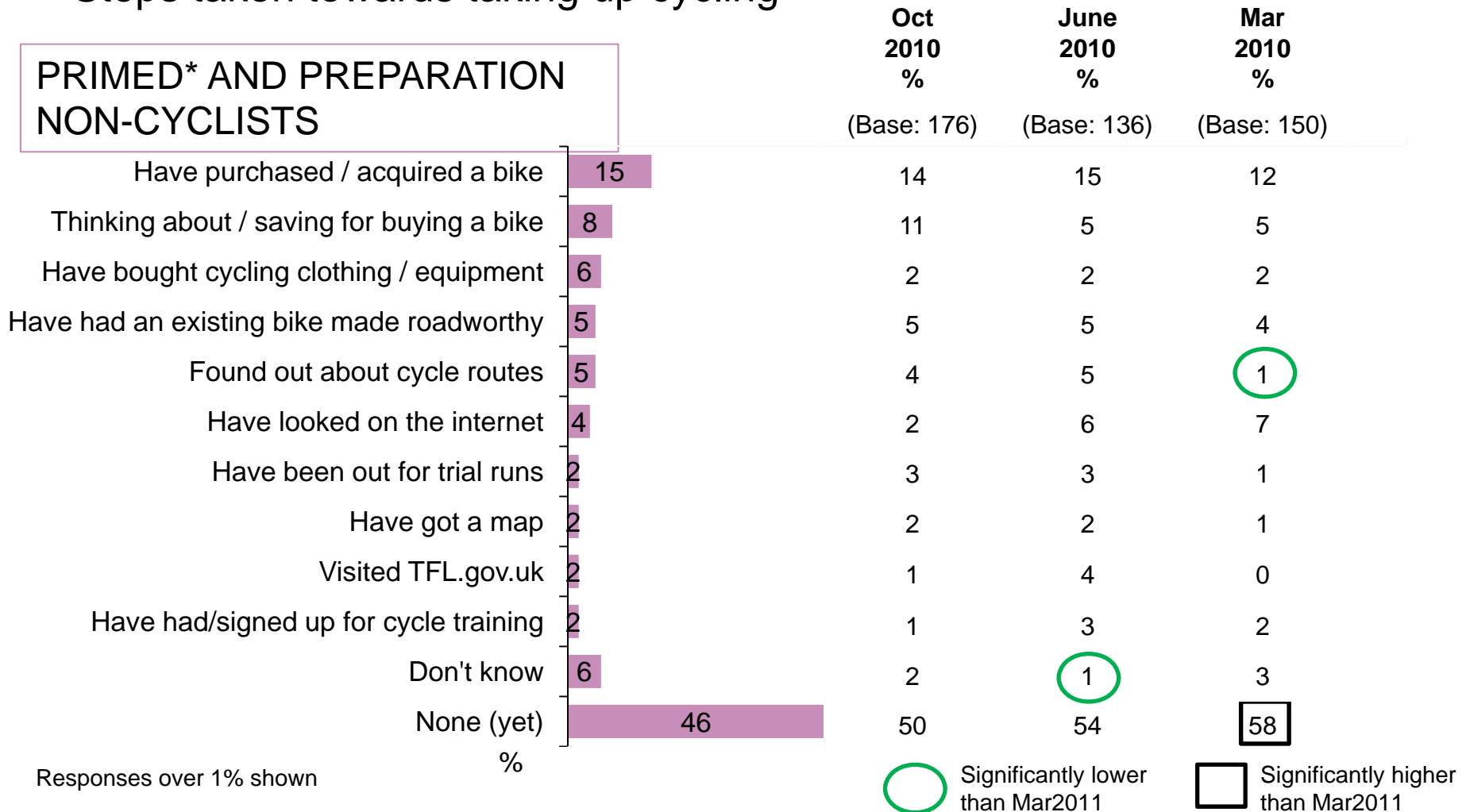
 Significantly higher than Mar2011

QC3g: What deters you from taking up cycling?
Base: Non-cyclists (890)



There has been a fall in the proportion of primed and preparation non-cyclists who have taken no steps towards taking up cycling

Steps taken towards taking up cycling

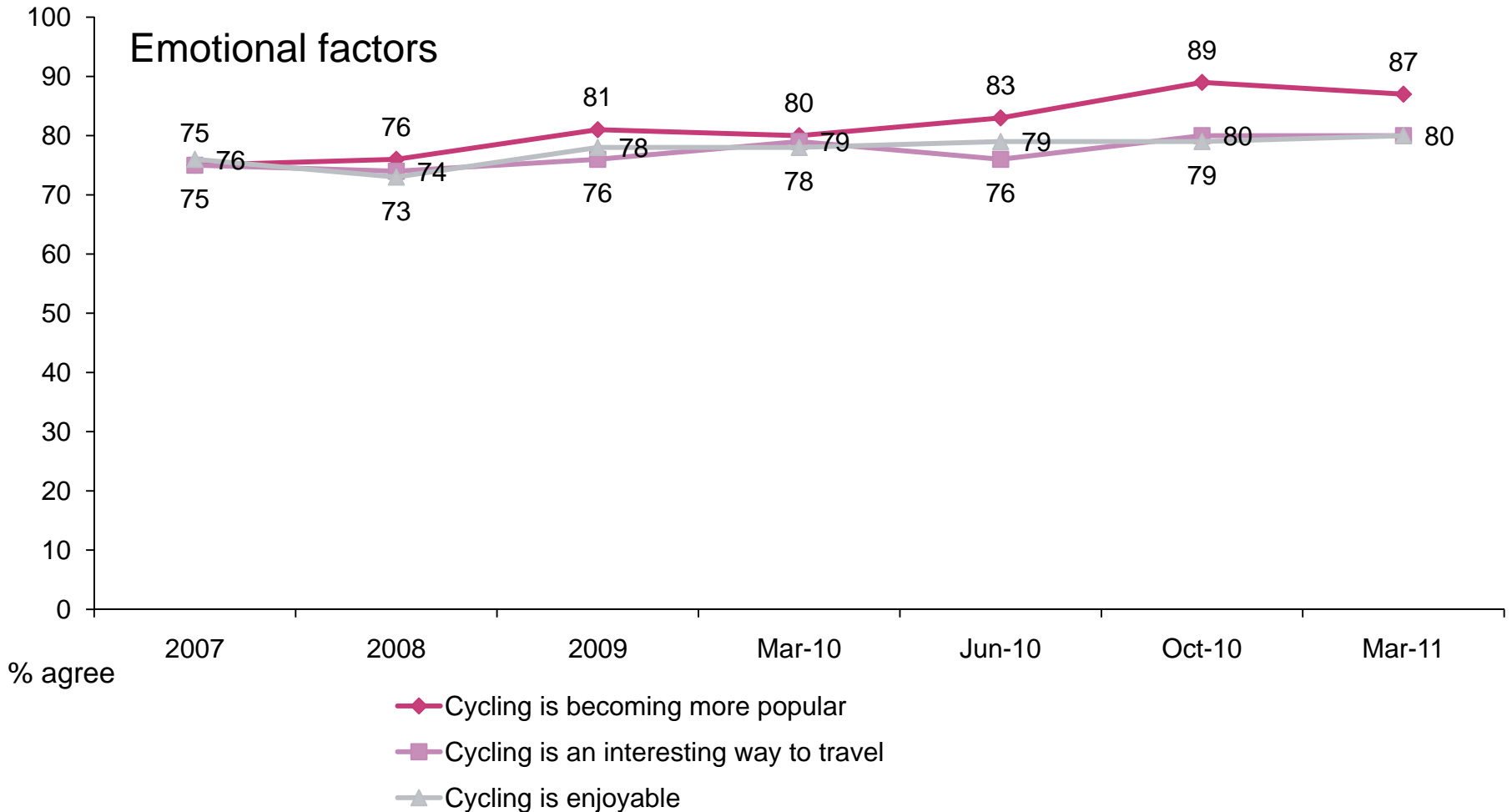


QC3d: What practical steps, if any, have you taken towards taking up cycling in the next 12 months?

Base: Those "thinking about...decided to...are setting things in place to..." take up cycling (175)

* Includes 'primed' individuals except those who 'were doing this but couldn't stick to it' at QTAKEUP1

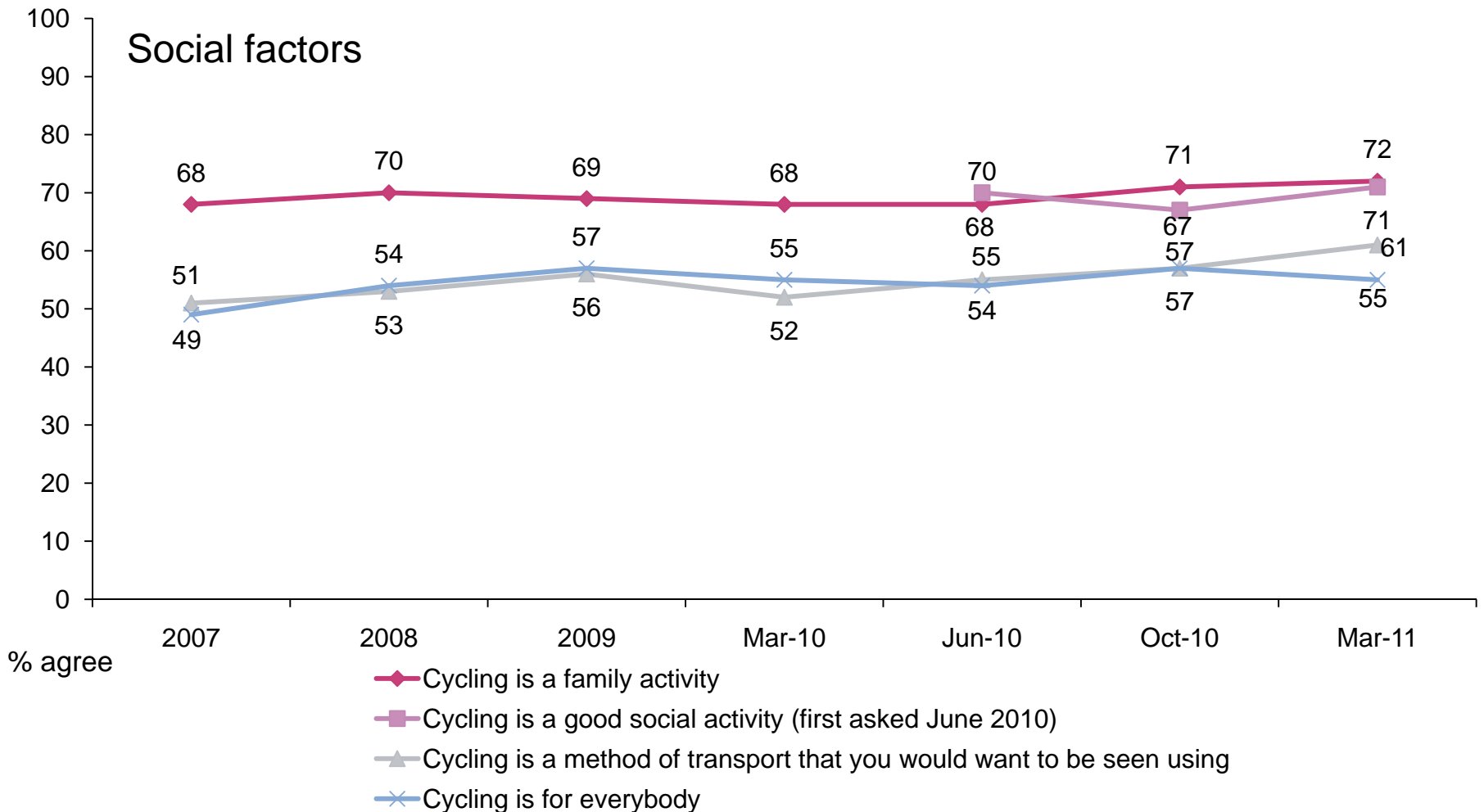
The increase in the proportion of Londoners viewing cycling as becoming more popular has been sustained this wave



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 – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

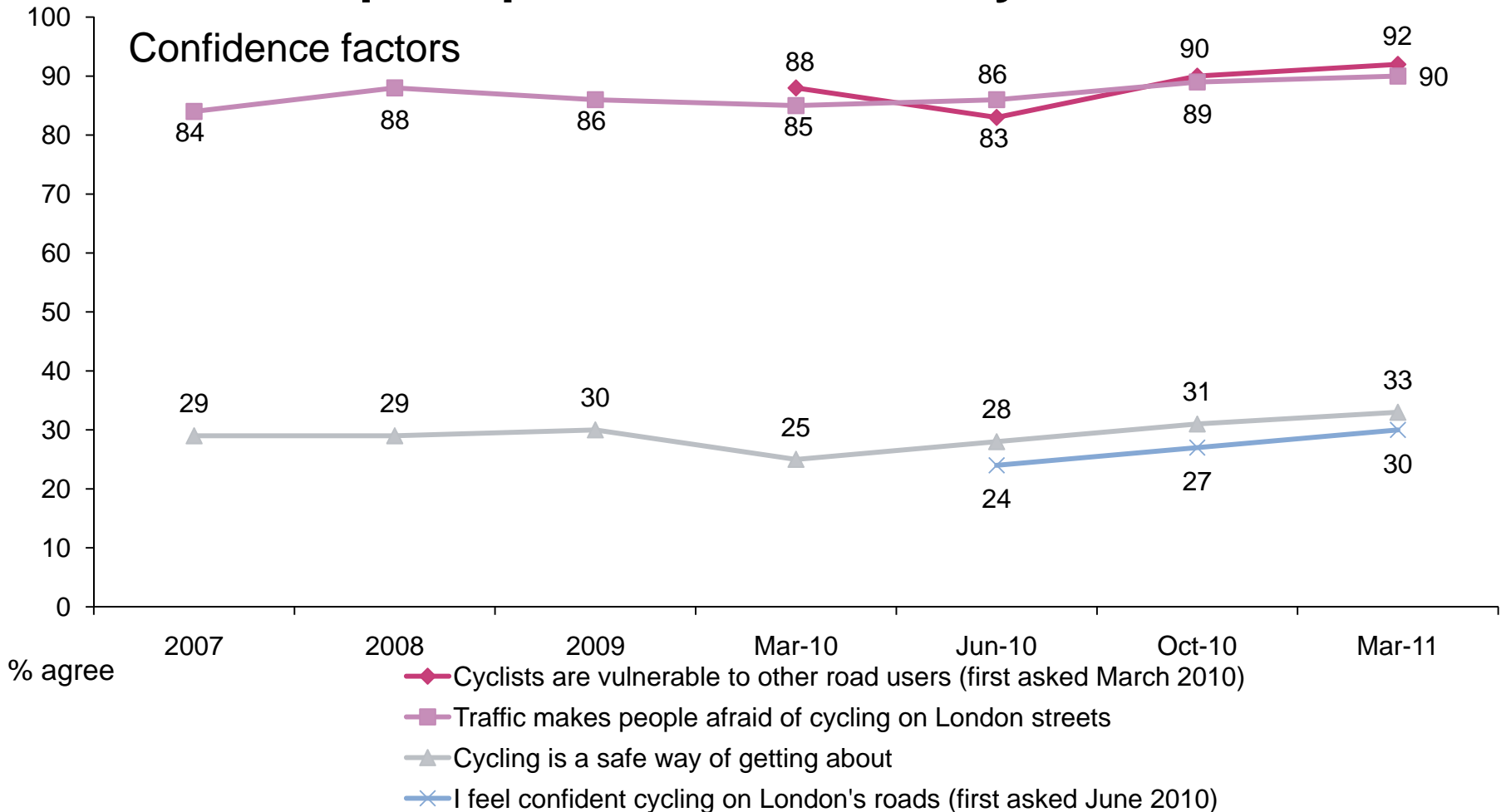
No dramatic change in the social factors around cycling over time



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 – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

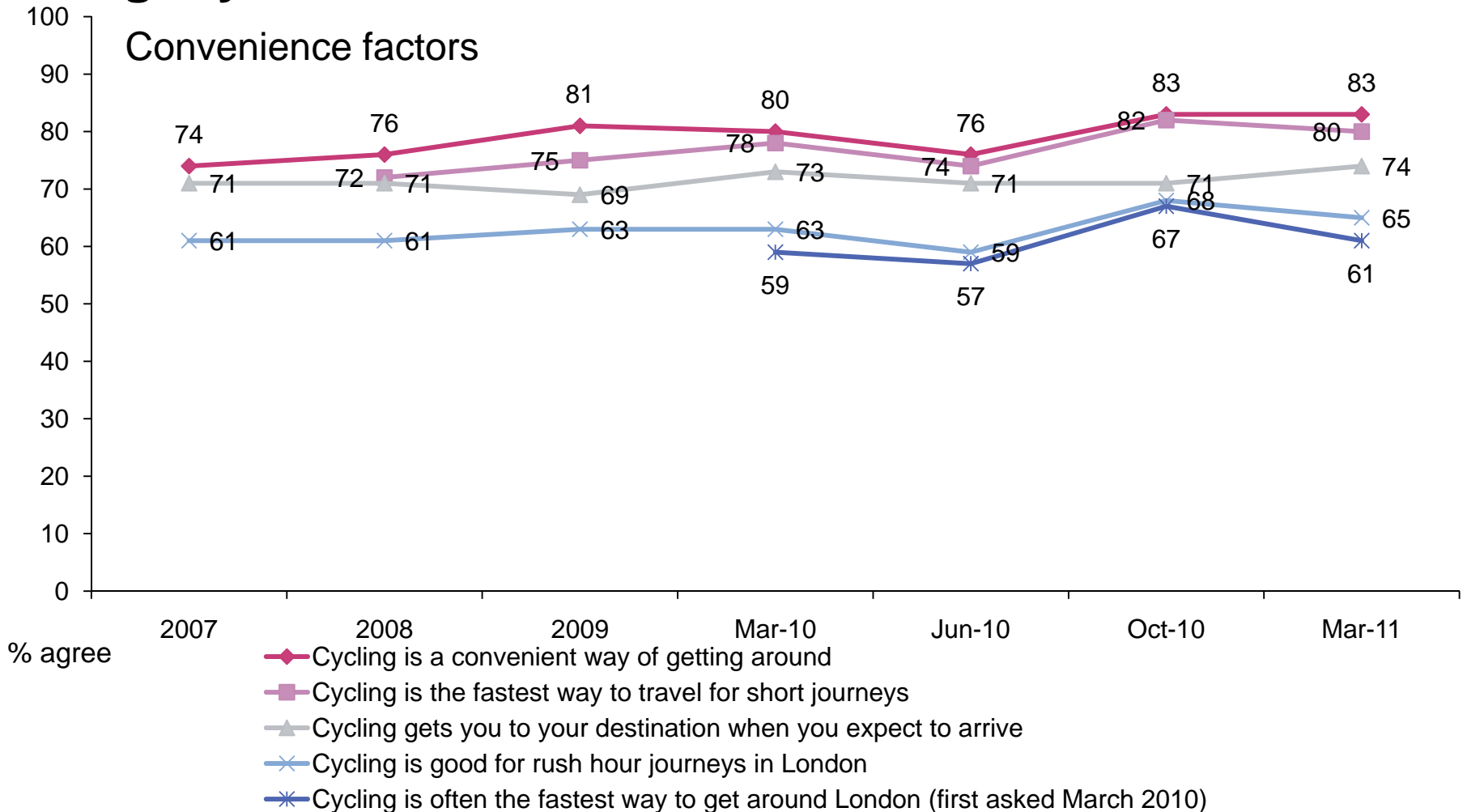
There has been an increase in perceptions of safety and confidence, although a corresponding increase in perception of vulnerability



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 – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

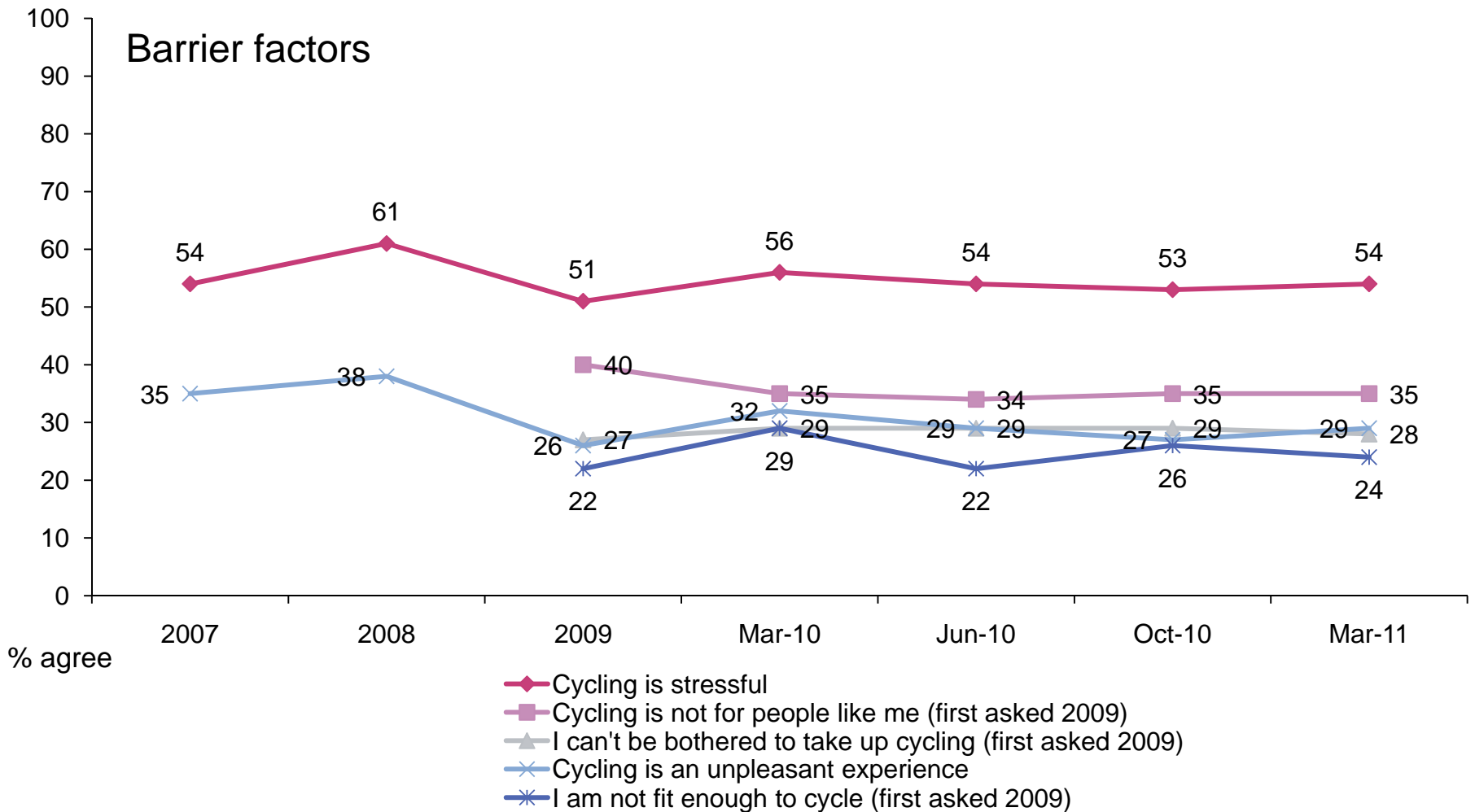
The proportion considering cycling to be the fastest way to get around London has decreased slightly since October 2010



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 - Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

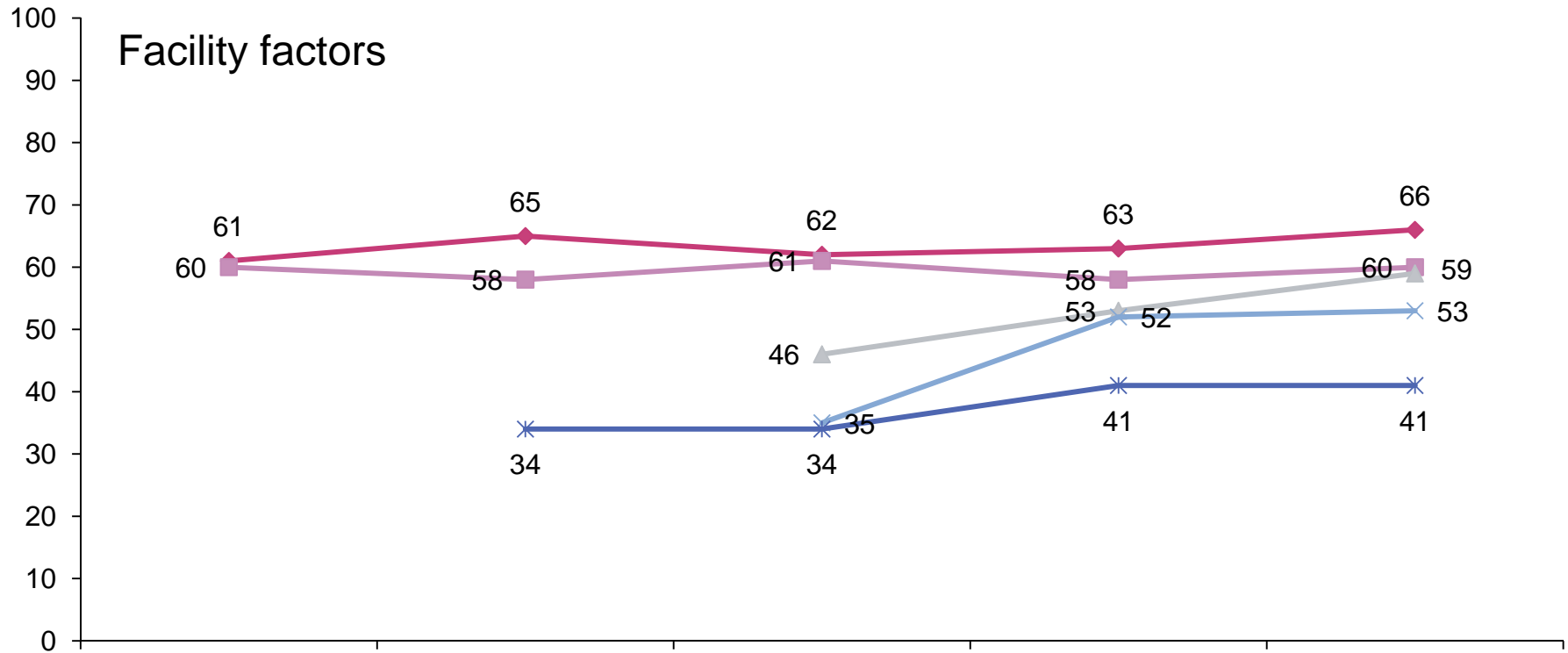
There has been little movement in views of the perceived barriers to cycling



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 – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

The opinion that information and signs make it easy to find your way around when cycling has increased for the second consecutive wave



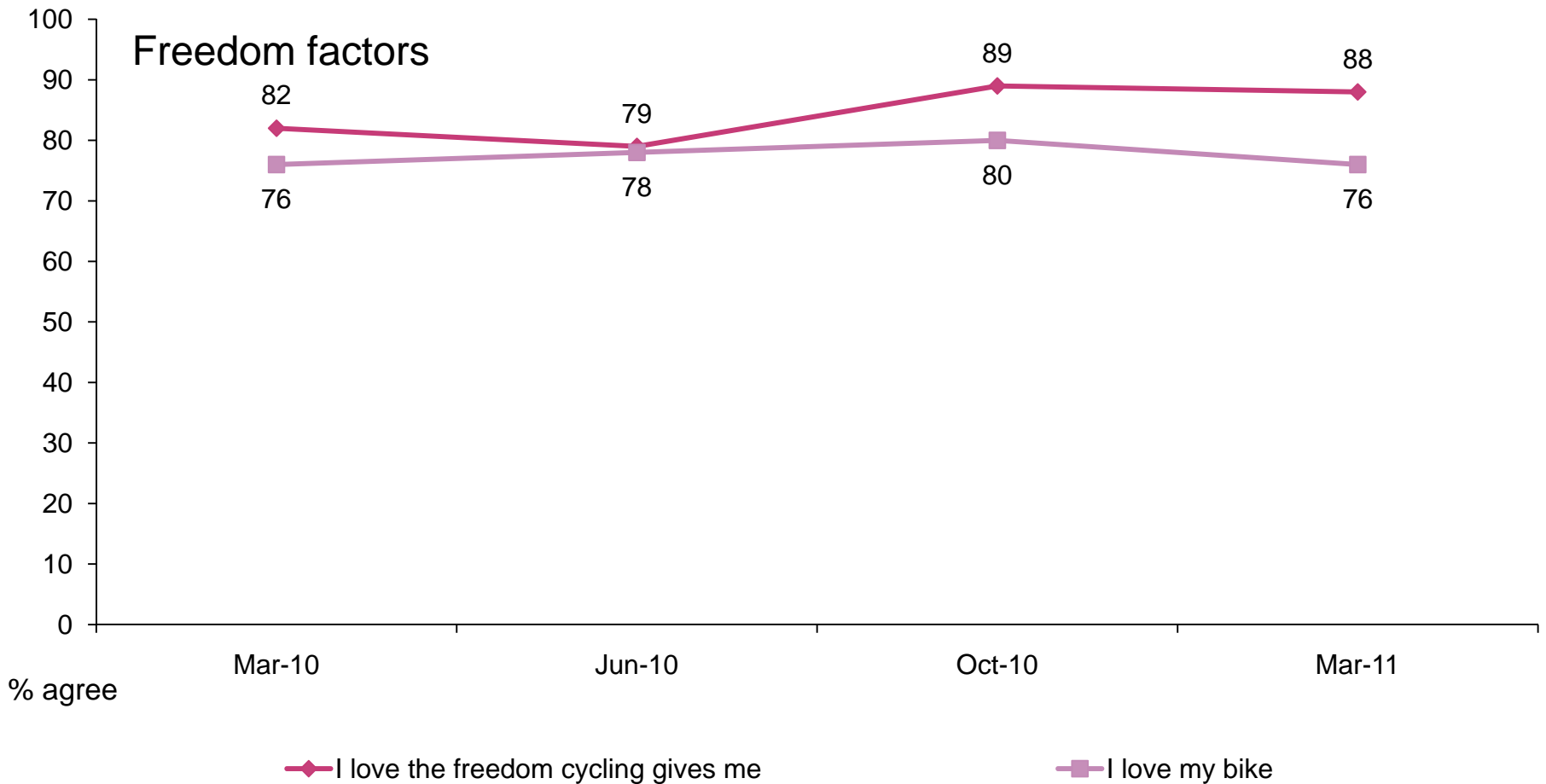
% agree

- ◆ My local area is good for cycling
- I see lots of people cycling in and around my local area
- ▲ Information and signs make it easy to find your way around when cycling (first asked June 2010)
- ✧ There are good facilities for cyclists in London (first asked June 2010)
- ✧ London is city for cycling (first asked March 2010)

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

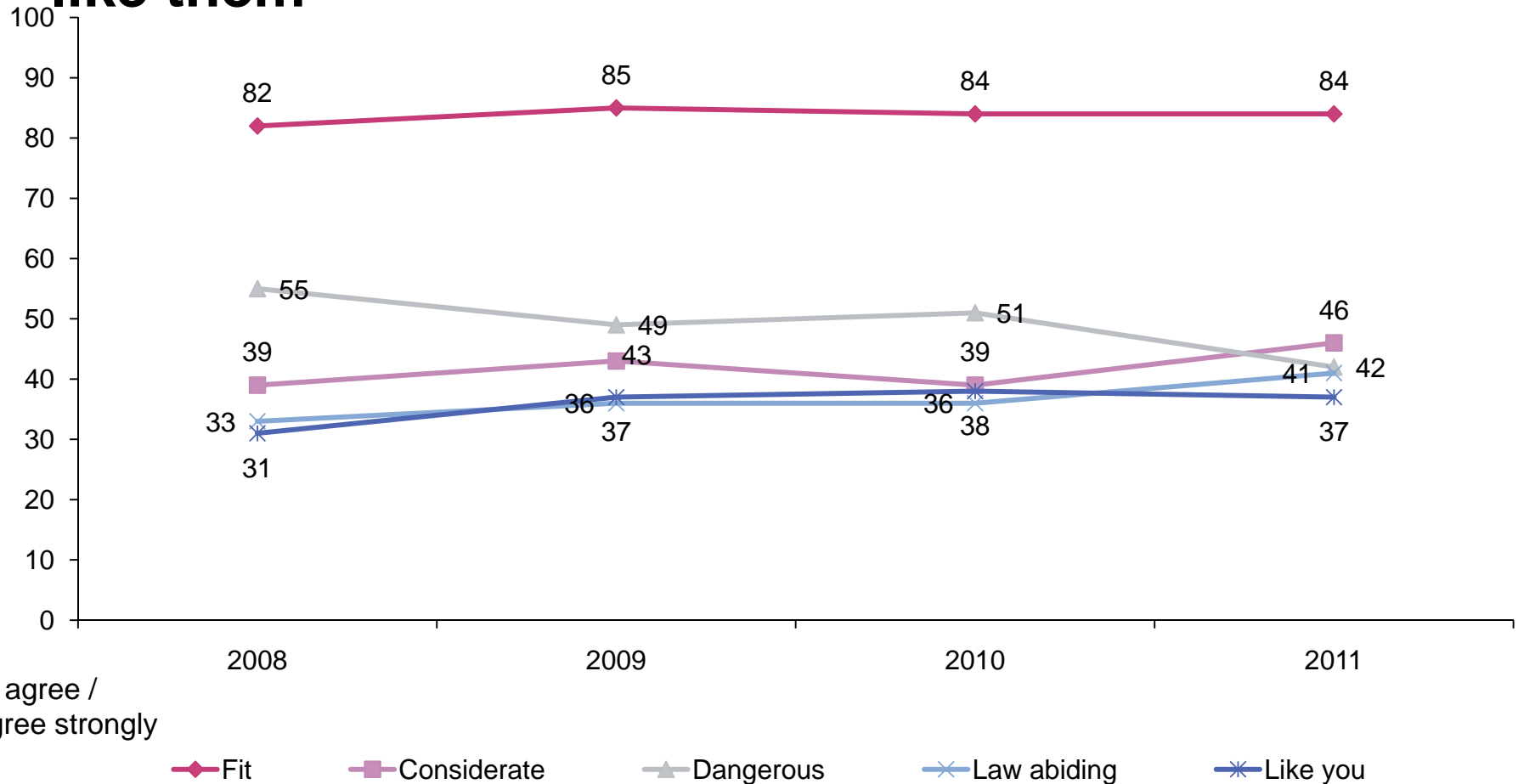
Base: All – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

Around nine in ten cyclists in the last two waves love the freedom that cycling gives them



QC2: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London
Base: Mar11 (176), Oct10 (182) June10 (170), Mar10 (156)

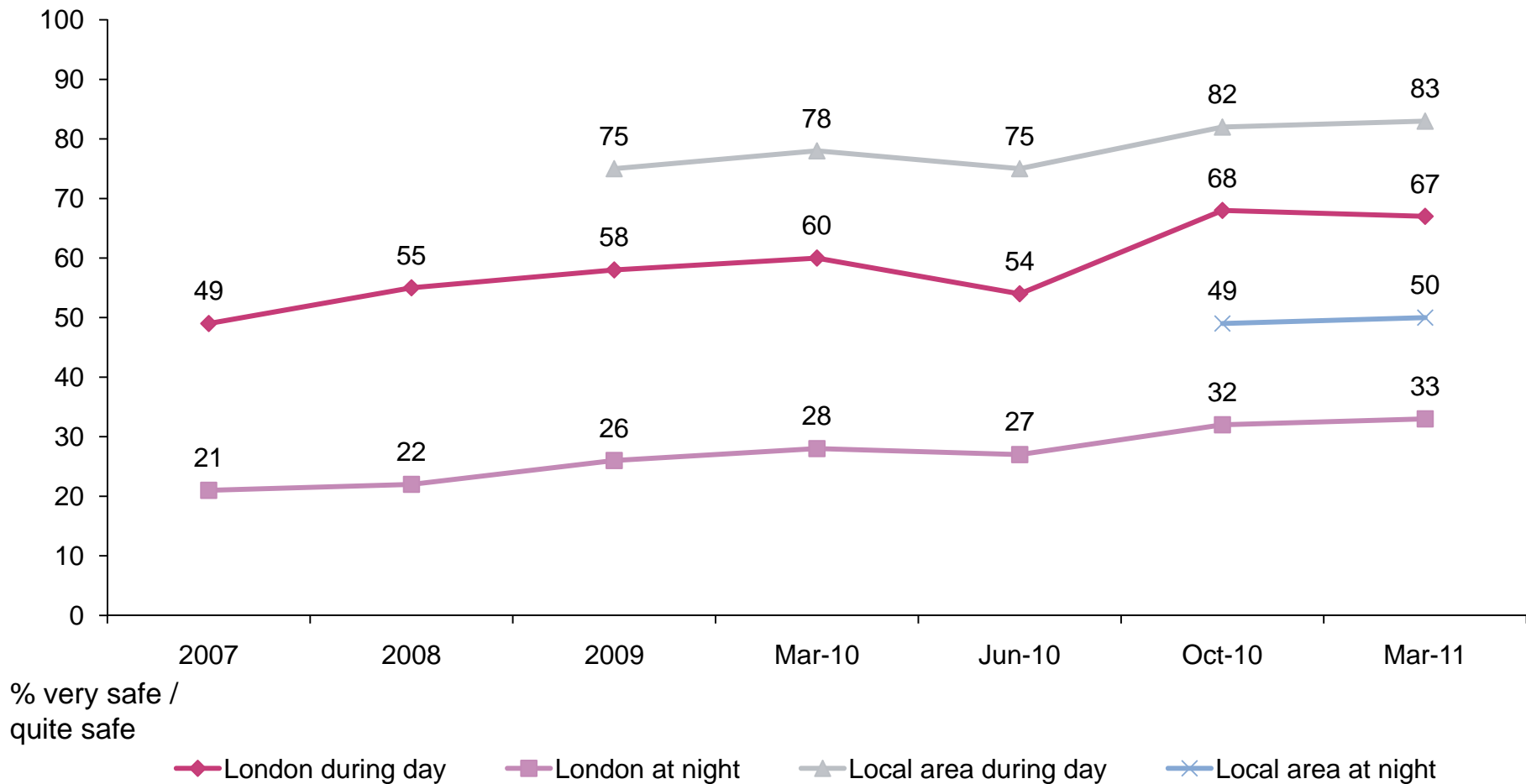
Around two in five Londoners think cyclists are dangerous, considerate, law abiding and/or like them



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 – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)

There is a general upward trend in the proportion of Londoners who feel safe from crime/anti-social behaviour when thinking about cycling in London and/or their local area



C13A, C13B, C13AA, C13BA. Thinking about cycling in {London/local area} {during the day/at night}, how safe from crime or antisocial behaviour do you feel? Base: All – Mar11 (1,066), Oct10 (1,017), June10 (1,000), Mar10 (1,007), 2009 (1,004), 2008 (1,002), 2007 (1,208)