

Attitudes towards cycling  
Library report –  
September 2015 (online)  
TfL number: 05110  
FT number: 1868  
FINAL REPORT





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# Introduction and reporting note



# Introduction

- To support the **Mayor's Vision for Cycling**, which sets out to double cycling over a decade (from 2013 to 2023), Transport for London (TfL) is making significant investment including new and improved cycle routes through central London, and innovative 'Mini-Hollands' in outer London boroughs
- "Attitudes towards Cycling" has been conducted since 2005 to assess cycling activity and attitudes among Londoners, and is one of a suite of important information sources to inform the delivery of this vision
- The results shown here are from the September 2015 survey which comprised 2,159 online interviews with adult Londoners. Data is weighted to represent the London population in terms of age, gender, ethnicity, working status and location (inner/outer London)

# Reporting note

- This report contains the results for every question in the survey broken down by key demographics. There is an accompanying summary report which draws out the emerging stories and themes
- Throughout this report, data from September 2015 is compared with the last online wave's figures. Statistically significant differences with the previous wave are shown as follows:  
 Significantly lower than March 2015 (online)    Significantly higher than March 2015 (online)
- Prior to September 2013, fieldwork was conducted via telephone. Where question wording is consistent we show comparisons with these earlier waves of research for certain key measurements
- From April 2014 TfL has adopted the 2011 Census data to define a 'representative' sample of Londoners, and data for 2014 and 2015 in this report are weighted to represent this population. Data from previous waves continue to be weighted to the 2001 Census. Analysis has shown that this update in weighting has not materially affected key performance indicators



# Summary of key findings



# Profile of cyclists and cycling behaviour

- One in six Londoners cycle to get around London (18 per cent), in line with the trend over the last five years
  - Three quarters of these are regular cyclists (cycling at least once a week) (74 per cent)
- A third of cyclists started cycling in the last 12 months. The proportion of new cyclists has risen this wave (up from 23 per cent in the Spring survey)
- Demographic groups with the highest incidence of cyclists are men, 25-44 year olds, workers and those from social classes AB
- While the proportion of cyclists remains unchanged in the total population, there have been increases among 35-44 year olds and social class group C2 (skilled manual workers)
- Almost half of cyclists (49 per cent) say they are cycling more this year than at the same time last year
- Cycling for pleasure/ exercise, for social or recreational reasons and to visit friends and relatives remain the most common types of trips made by bike
- 62 per cent of children have access to bikes and of these, 28 per cent cycle to school regularly

# Behaviour change

- TfL has developed a behaviour change model to assess cyclists' and non-cyclists' propensity to increase their level of cycling
  - 56 per cent of cyclists are in the 'sustained change' category (meaning they are already cycling more and are still doing it either regularly or occasionally). This has remained stable over time
  - Most non-cyclists (82%) continue to place themselves in the 'pre-contemplation' stage (never thought about cycling more and would be unlikely to or never thought about it but could be open to the idea in the future)
- Seven per cent of cyclists and non-cyclists are in the 'lapsed' category (meaning that they started cycling more, but couldn't stick to it), the same proportion as last wave





# Motivations and deterrents

- The key motivation for starting cycling, cycling more and planning to cycle more remains a desire to get fit or keep fit. Other important motivations are the enjoyment of cycling, the convenience of it and saving time and money
- More are giving increased feelings of safety as a reason for cycling more/ considering cycling more
- The majority (78 per cent) of those planning to cycle more have taken practical steps such as making their bike more roadworthy and buying a bike, cycling clothes and equipment
- The main deterrents to taking up cycling or cycling more continue to be perceptions of danger, fear of collisions, too much traffic, fear of having one's bike stolen, lack of time and lack of confidence



# Attitudes to cycling

- The vast majority of Londoners continue to think that cycling is enjoyable as well as becoming more popular
- Three quarters of Londoners agree that cycling makes a positive contribution to quality of life and is a good social activity. Four in ten would recommend cycling to others
- Cycling is still widely thought of as a convenient way of getting around and the fastest way to travel for short distances
- Six in ten agree that information and signs make it easy to find your way around, that there are good facilities for cyclists in London and that their local area is good for cycling
- Cyclists find all types of journey (in their locality, in Central London and in areas beyond their locality) more appealing in September 2015 compared to March 2015
- Over eight in ten agree that cyclists are vulnerable and traffic makes people afraid of cycling but there are upturns in the proportions agreeing that it is a safe way to get about and they feel confident cycling on London's streets



# Barriers

## Infrastructure

- Less than half of cyclists give 'good' ratings to the availability of cycle lanes, the availability of parking facilities for bikes near their home, the safety of cycling and bike security

## Safety

- Safety concerns remain a major barrier to increased cycling, as in previous waves
- Cyclists, both regular and occasional, feel significantly safer when cycling in traffic on quiet roads compared to when on busy roads
  - There have been significant rises in the proportions of all cyclists feeling safe on busy roads this wave. Now half of regular cyclists feel safe on busy roads
  - However only 23 per cent of occasional cyclists feel safe on these roads



# Cycle Hire

- Santander Cycle Hire (formerly Barclays Cycle Hire) was launched in July 2010 and provides access to hire bikes
  - There have been extensions of the scheme to areas of east and south west London in recent years
- Eighteen per cent of Londoners have used the Cycle Hire scheme and a further four per cent are members
  - 16-44 year olds, BAME Londoners and working Londoners are most likely to use the scheme
- The Cycle Hire scheme has a positive impact on over seven in ten users and intended users, encouraging them to cycle more
- 26 per cent of Londoners say they will definitely or probably use the scheme in the future



# Cycle Superhighways

- Cycle Superhighways 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
  - Five more routes are planned for 2015 and 2016
- Eleven per cent of Londoners say they have used Cycle Superhighways before, rising to over a third of cyclists (37 per cent)
- One in five (21 per cent) intend to use Cycle Superhighways in the future (56 per cent of cyclists)
  - Use of Cycle Superhighways among cyclists is significantly higher this September compared to March 2015
- The impact of Cycle Superhighways on Londoners' propensity to cycle is marginally higher this time compared to March
  - 70 per cent of current users say they have increased their cycling as a result of Cycle Superhighways
  - 69 per cent of intended users say Cycle Superhighways have increased the amount they intend to cycle

# Cycling events

- The Tour de France continues to be the most well-known cycling event among Londoners, with over nine in ten (92 per cent) aware of it, but down on March (96 per cent)
  - Awareness of the Tour of Britain stands at 68 per cent, also down on March (74 per cent)
- Awareness of the Prudential RideLondon events is significantly higher this wave than in March. Half are aware of the FreeCycle (51 per cent), the RideLondon-Surrey 100 (50 per cent) and the RideLondon-Surrey Classic (48 per cent) and over four in ten are aware of the RideLondon Grand Prix (44 per cent)
- Participation in the Prudential RideLondon FreeCycle and RideLondon-Surrey 100, the Local Bike Week events and other local cycling events has increased compared to March 2015 and September 2014
- Around one in five (21 per cent) of Londoners who watched or took part in Prudential RideLondon 2015 say that they now cycle more or have taken up cycling
- The impact of the Tour of Britain 2015 is slightly lower with 16 per cent encouraged to cycle more or take up cycling



# Cycle training

- One in five Londoners have taken some form of cycle training. Nine per cent say they have taken part in training in the last ten years
  - The old National Cycling Proficiency Test (51 per cent) is the most common type of training attended, followed by one-to-one training (28 per cent) and the school 'Bikeability' training (23 per cent)
  - There has been a rise in those attending one-to-one training sessions
- Training has a very direct impact on cycling confidence with 36 per cent saying they are much more confident and 43 per cent, a little more confident as a result of it
- Awareness of cycle training is significantly higher among women than men and rises with age
- 37 per cent of Londoners claim they would consider taking cycle training in the future, but this has been declining over the last two waves
  - The idea of cycle training continues to be most appealing to BAME Londoners and falls with age
- The main resistance to cycle training is a belief that they are sufficiently skilled anyway. Others say it is not for them or would never consider cycling in London

# Investment in cycling

- Three in ten Londoners (30 per cent) feel there is too little investment in cycling and one in six (18 per cent), that there is too much
  - Predictably, cyclists continue to feel most strongly about this (39 per cent feeling there is too little investment)
- 74 per cent are aware that it is TfL's responsibility to improve conditions for cycling in London, including the management of the Cycle Hire scheme and Cycle Superhighways, providing guidance and maps and providing cycle training
- Two thirds of Londoners feel that improving the Capital's road network will be beneficial to all
- Around half of Londoners continue to believe that TfL cares about cyclists, is investing to improve people's journeys and is a trustworthy organisation



# Cycle crime

- Cyclists feel safer (from crime and antisocial behaviour) when cycling during the day than at night and slightly safer when cycling in their local area than when cycling in London generally
- Feeling safe at night has improved significantly this wave (62 per cent now feel it is safe to cycle in their local area at night (up from 53 per cent last wave) and 53 per cent feel it is safe to cycle in London generally at night (up from 40 per cent)
- Over eight in ten Londoners report they have not been a victim of cycle theft in the last couple of years (similar to previous waves)
  - Where theft occurs, in 43 per cent of cases, this goes unreported, as most don't think the Police will be able to do anything about it
- However, six in ten Londoners believe there is a lot of bike theft in London and for four in ten, concerns about bike theft put them off cycling
- Bike theft is still having an impact on victims' cycling levels this wave, with 38 per cent stating they had stopped cycling altogether or temporarily as a result
- Over half of cyclists change their route after dark, with regular cyclists more likely to do so (58 per cent). They do this for better lighting and for a safer route
- Only four in ten (41 per cent) have their bike marked/registered with the police and less than three in ten (27 per cent) have it insured against theft

# Cycling confidence

- 81 per cent of cyclists feel confident cycling in their local area and 62 per cent feel confident cycling in London generally. This rises to 84 per cent and 71 per cent respectively, among regular cyclists
  - Confidence cycling in London generally has increased significantly compared to last wave
- On balance more cyclists believe cycling it is getting safer (53 per cent) than believe it is becoming more dangerous (19 per cent). These results are marginally better than March 2015
- When considering cycling in the local area, there have been significant rises in the proportions believing it is getting safer
- More than half of cyclists feel less confident when cycling near HGVs, on busy roads, in bad weather or near buses (similar results to previous waves)
- Cycling on the pavement is still the most common 'bad' behaviour admitted to by cyclists and significantly up on last wave (72 per cent admit to this). More are also owning up to cycling through red lights and cycling while using a mobile phone



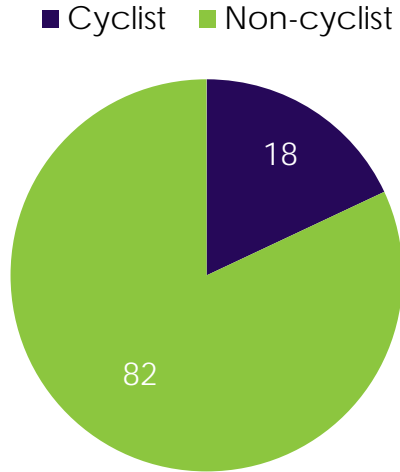
# Profile of cyclists and cycling behaviour

# Profile of cyclists and cycling behaviour

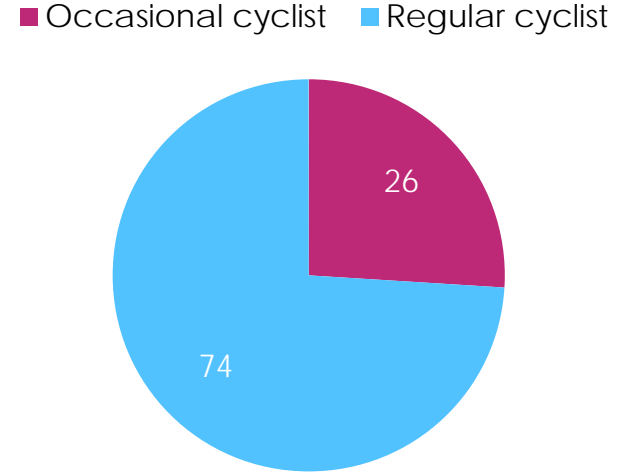
- One in six Londoners cycle to get around London (18 per cent), in line with the trend over the last five years
  - Three quarters of these are regular cyclists (cycling at least once a week) (74 per cent)
- A third of cyclists started cycling in the last 12 months. The proportion of new cyclists has risen this wave (up from 23 per cent in the Spring survey)
- Demographic groups with the highest incidence of cyclists are men, 25-44 year olds, workers and those from social classes AB
- While the proportion of cyclists remains unchanged in the total population, there have been increases among 35-44 year olds and social class group C2 (skilled manual workers)
- Almost half of cyclists (49 per cent) say they are cycling more this year than at the same time last year
- Cycling for pleasure/ exercise, for social or recreational reasons and to visit friends and relatives remain the most common types of trips made by bike

# Eighteen per cent of Londoners cycle to get around London, and of these, three quarters are categorised as regular cyclists (cycling at least once a week)

Cyclists and non-cyclists (%)



Breakdown of regular and occasional cyclists (%)



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

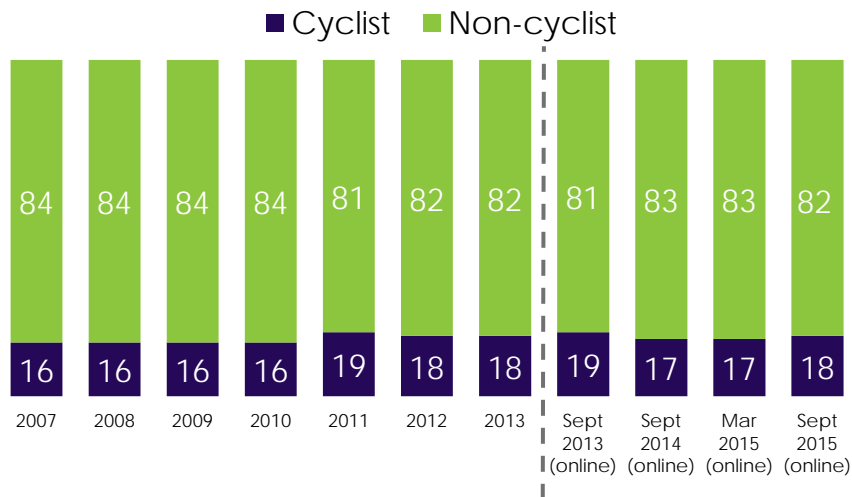
QFREQ: Which of these modes of transport do you ever use to get around London? Base: all (2159)

QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London? Base: All cyclists (505)

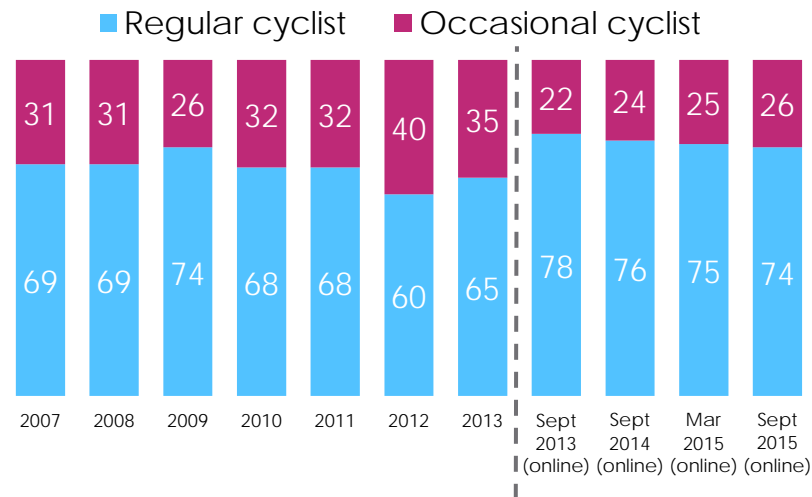
The proportion of Londoners who cycle to get around London in the latest survey (September 2015) is generally continuing at the same level as has been seen over the last five years

## Profile of cycling over time

Cyclists and non-cyclists (%)



Breakdown of regular and occasional cyclists (%)



QFREQ: Which of these modes of transport do you ever use to get around London? Base: all – Sept 2015 (online) (2159), Mar 2015 (online) (2241), Sept 2014 (online) (2192), Sept 2013 (online) (1333), 2013 (1373), 2012 (1326), 2007-2011 (c1000)

QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London?

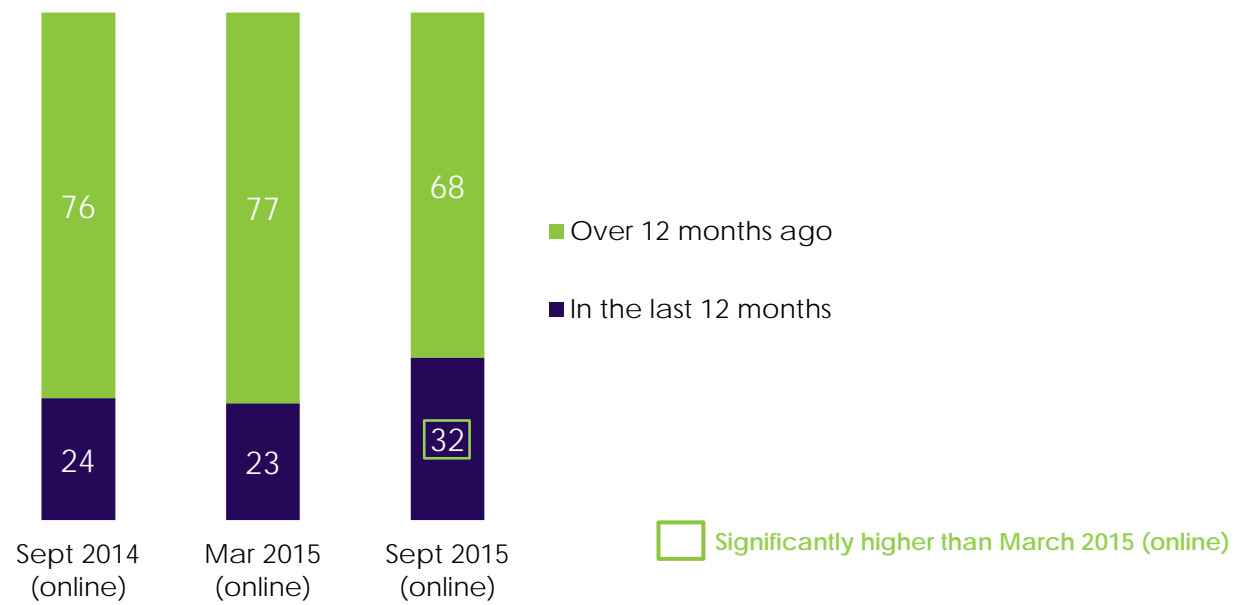
Base: All cyclists – Sept 2015 (505), Mar 2015 (online) (506), Sept 2014 (online) (532), Sept 2013 (online) (509), 2013 (532), 2012 (508), 2007-2011 (c170)



Two in three cyclists started over a year ago. There has been a significant increase in the proportion of cyclists who started cycling in the last year, up from 23 per cent in the Spring survey to 32 per cent in the latest survey

### Cycling history

When started cycling (%)

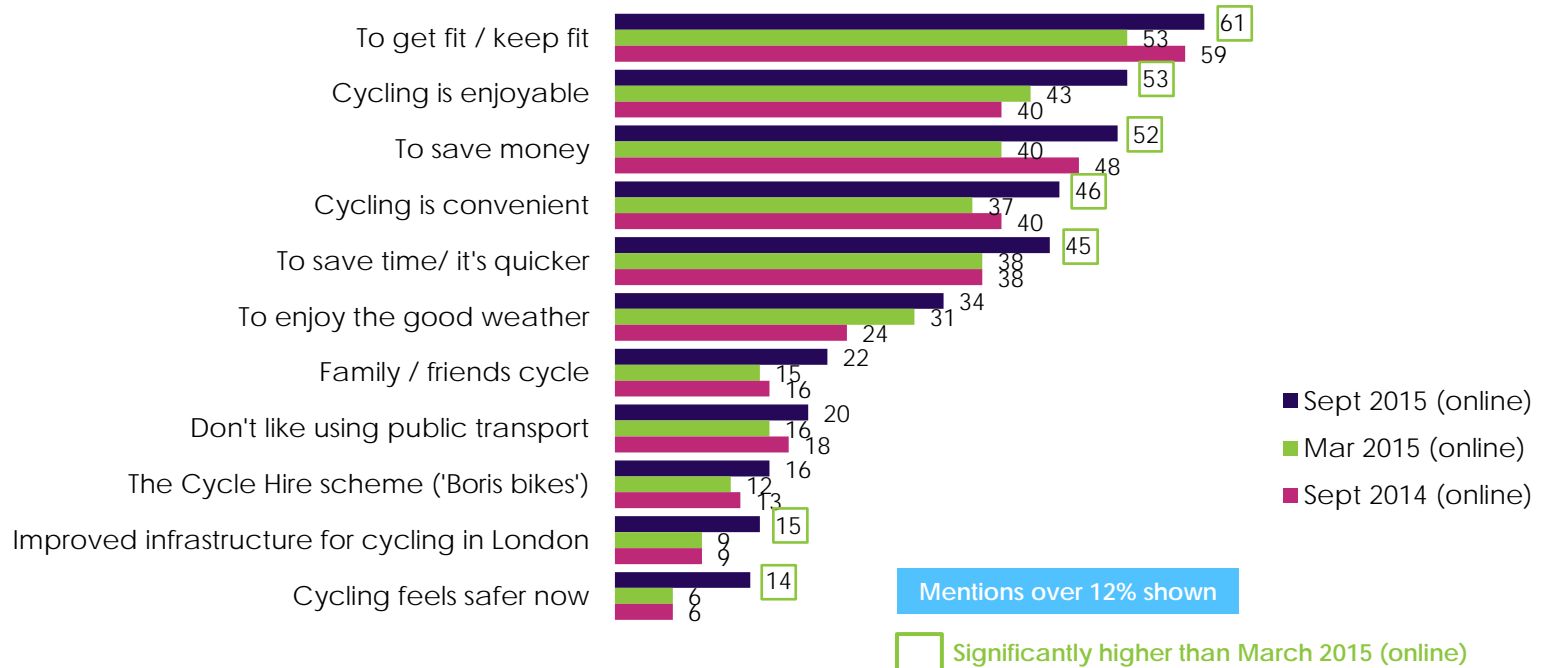


Y1. When did you start cycling? Base: All cyclists Sept 2015 (online) (505), Mar 2015 (online) (510), Sept 2014 (online) (524)



Cyclists are mentioning almost all of the positive aspects of cycling as reasons for starting cycling to a significantly higher extent than in the last two waves – keeping fit, for enjoyment, saving money and convenience are the top mentions as before

## Reasons to start cycling - %

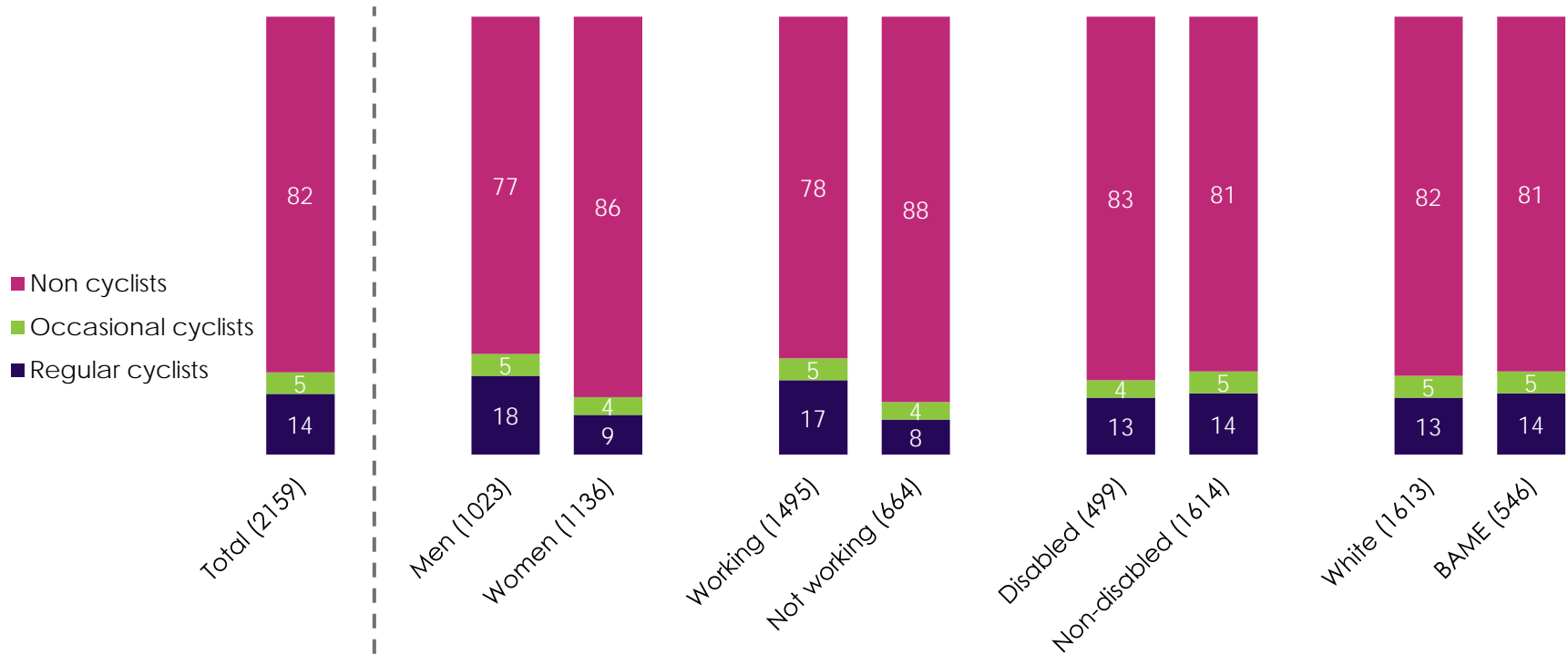


C6: What prompted you to start cycling? Base: All cyclists Sept 2015 (online) (505), Mar 2015 (online) (506), Sept 2014 (online) (523)



# Men and those in employment are more likely to be cyclists. There is no significant difference in the proportion of cyclists between disabled/ non-disabled Londoners and white and BAME Londoners

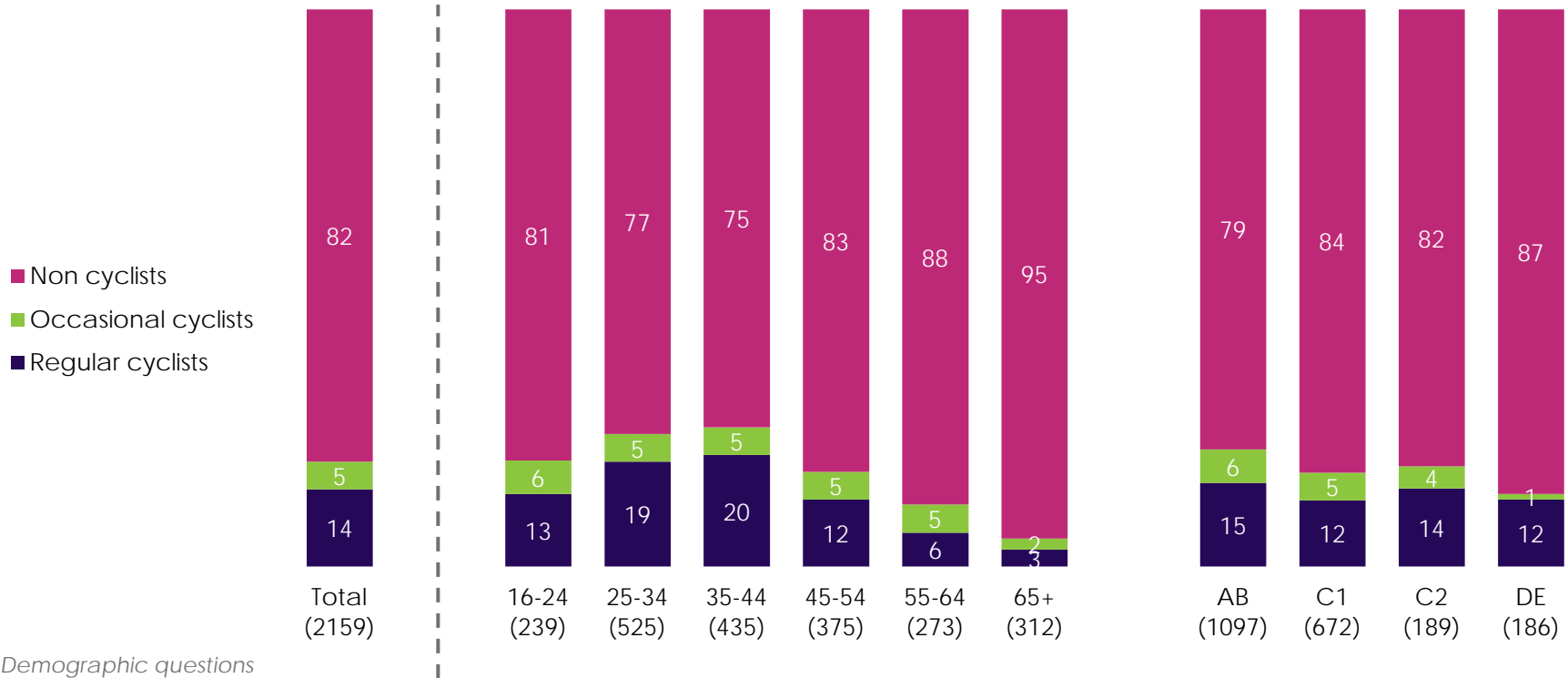
## Profile of cyclists (2015) – %



Demographic questions  
Base: All – Sept 2015 (online)

# 25-44 year olds and those in AB households are also more likely to cycle

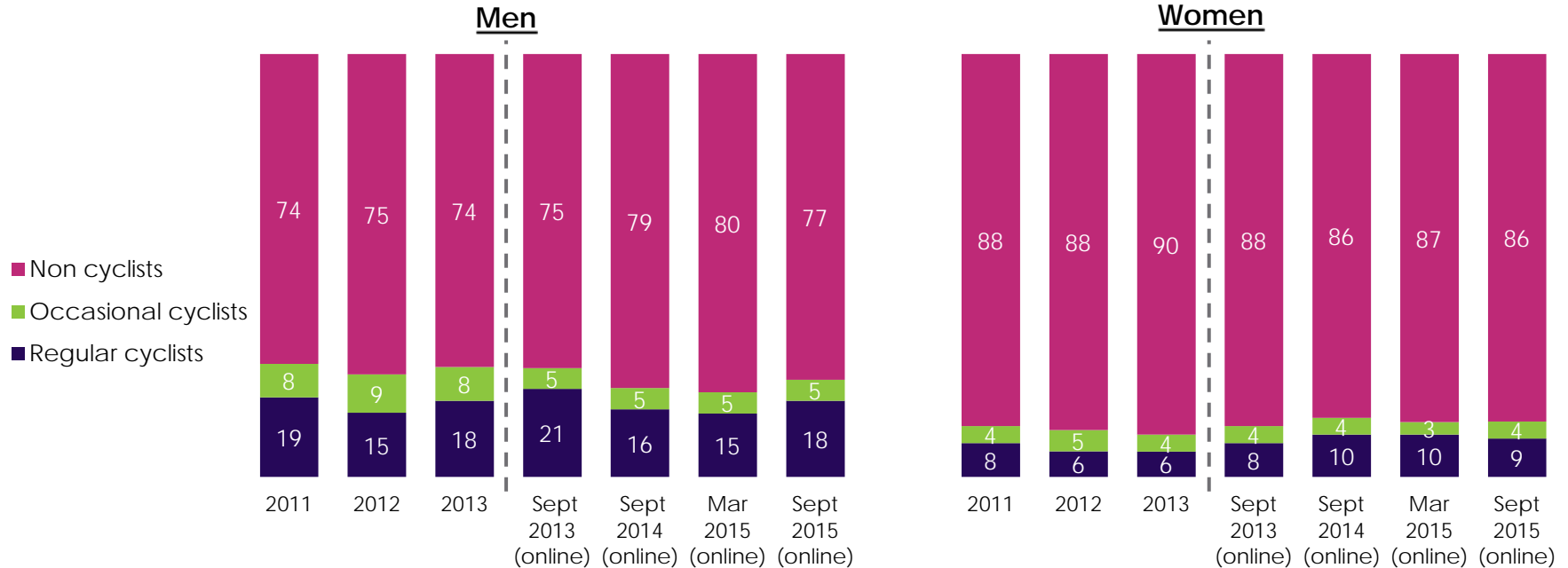
## Profile of cyclists (2015) – %



Demographic questions  
Base: All – Sept 2015 (online)

# The proportions of men and women who are cyclists remain unchanged

## Profile of cyclists (trend) – %



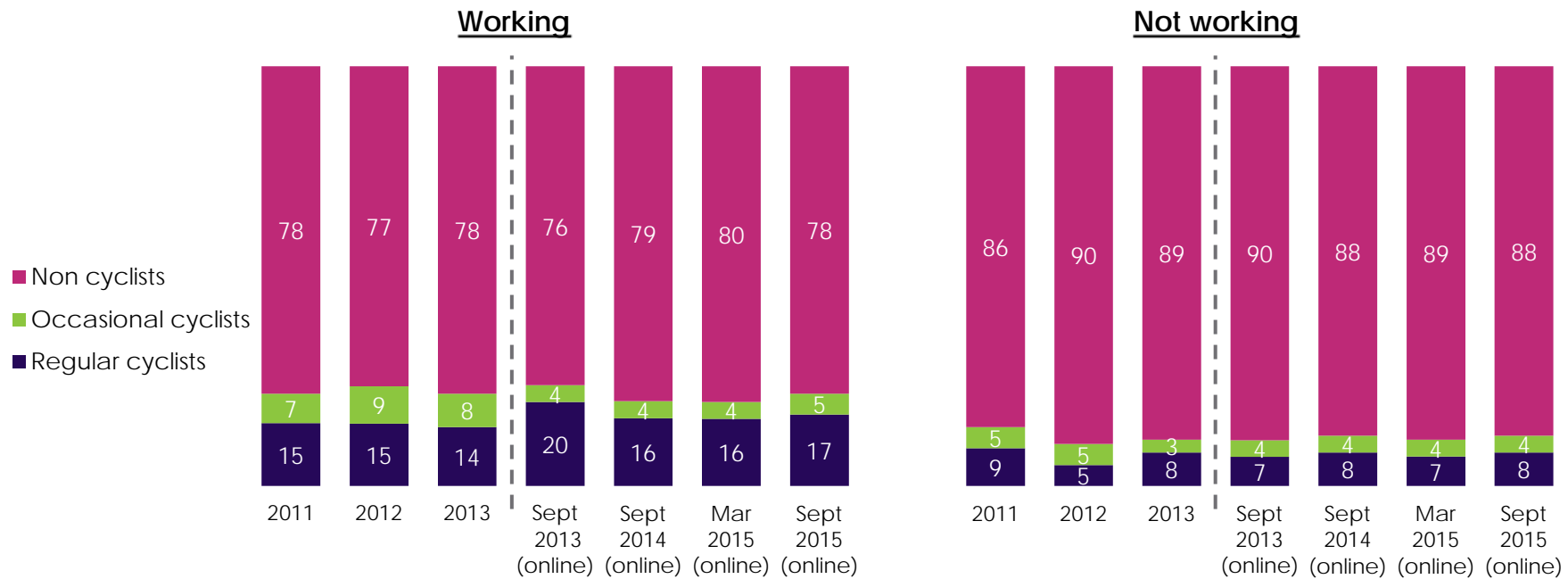
Demographic questions

Base: All Sept 2015 (online) Men (1023), Women (1136)



# The proportions of working and non working people who are cyclists remain unchanged

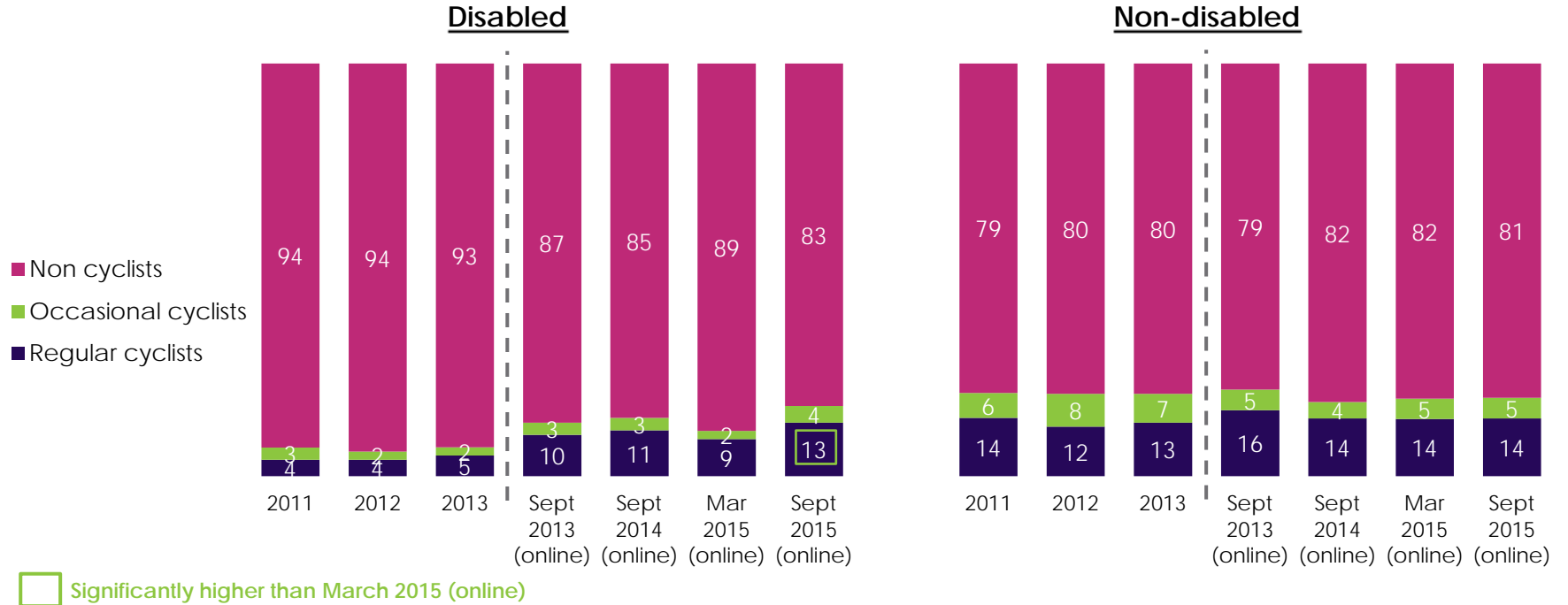
Profile of cyclists (trend) – %



Demographic questions  
 Base: All Sept 2015 (online) Working (1495), Not working (664)

# More disabled Londoners are cycling in the latest wave

Profile of cyclists (trend) – %



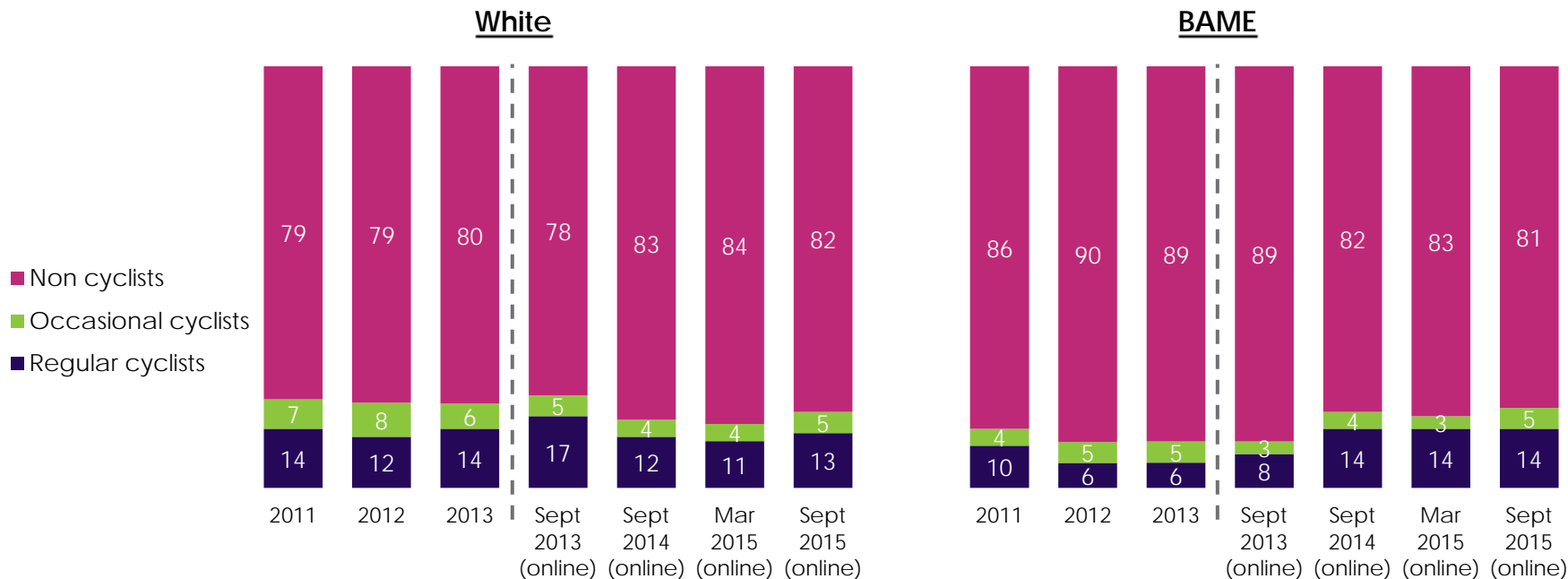
Demographic questions

Base: All Sept 2015 (online) Disabled (499), Non-disabled (1614)



# The proportions of white and BAME Londoners who are cyclists remain unchanged

Profile of cyclists (trend) – %



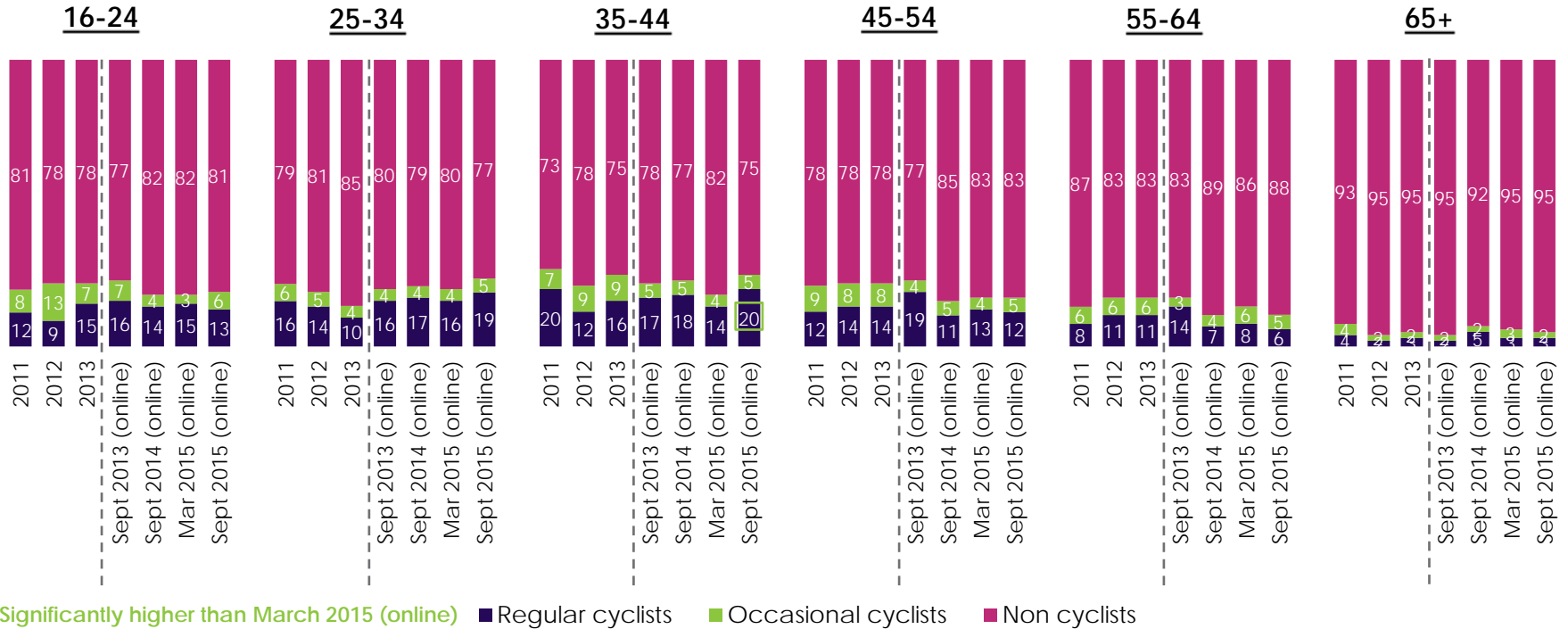
Demographic questions

Base: All Sept 2015 (online) White (1613), BAME (546)



# The 35-44 age group is the only one showing a significant rise in the proportion of cyclists in the latest wave

## Profile of cyclists – %

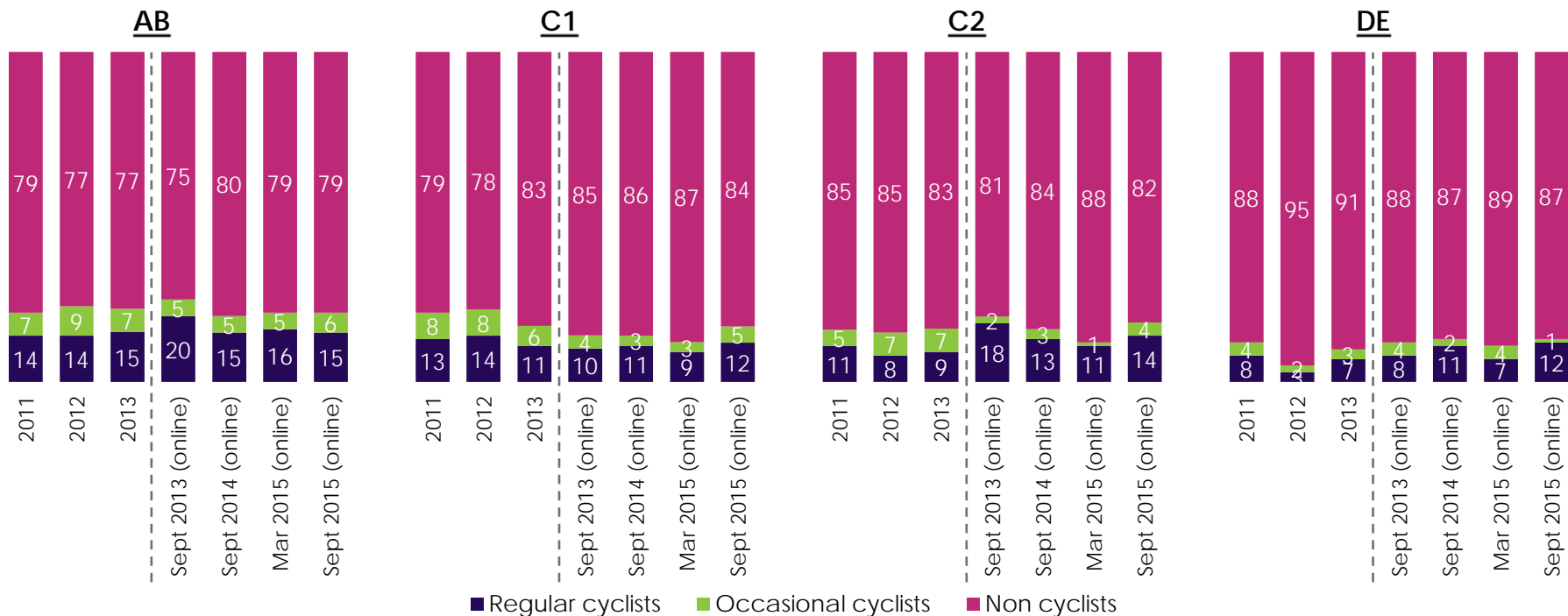


Demographic questions

Base: All Sept 2015 (online) 16-24 (239), 25-34 (525), 35-44 (435), 45-54 (375), 55-64 (273), 65+ (312)

# The are no significant changes in the proportion of cyclists in any of the social class groups this wave

## Profile of cyclists – %



Demographic questions

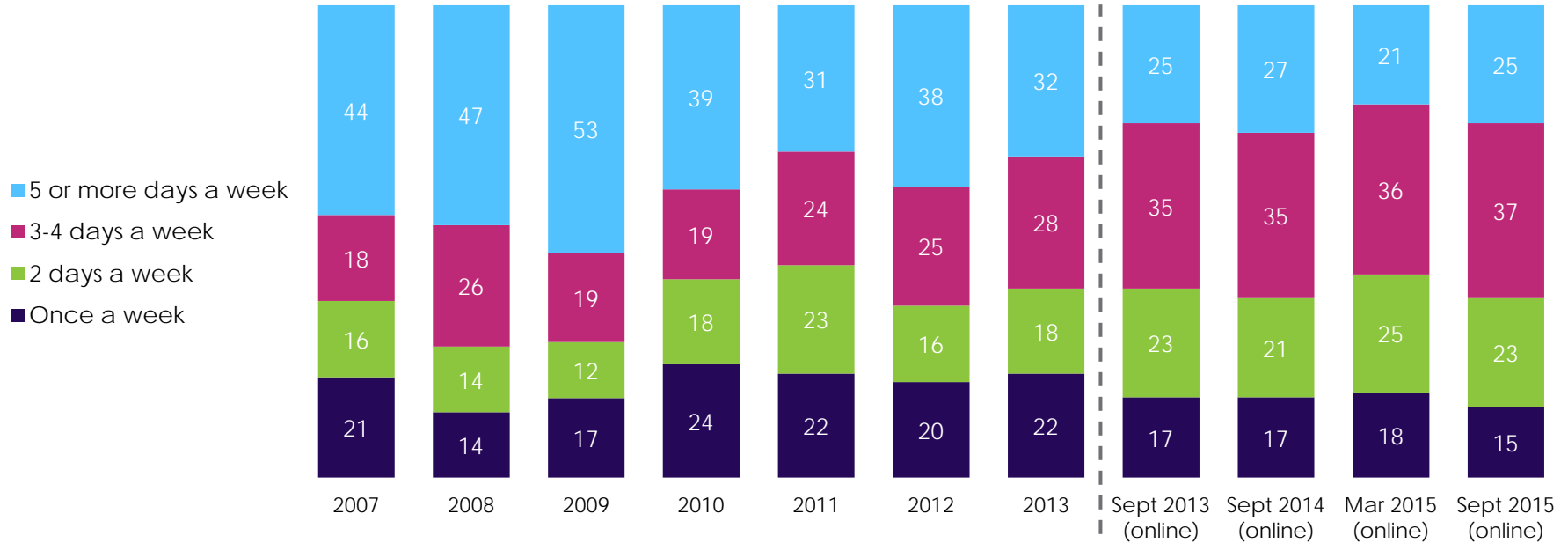
Base: All Sept 2015 (online) AB (1097), C1 (672), C2 (189), DE (186)

Details of SEG definitions can be found in the appendix



While the frequency with which regular cyclists cycle has not changed that much over the last two years, there is a longer term decline in the proportion of Londoners cycling 5 or more days a week since 2009

Frequency of cycling among regular cyclists (trend) – %



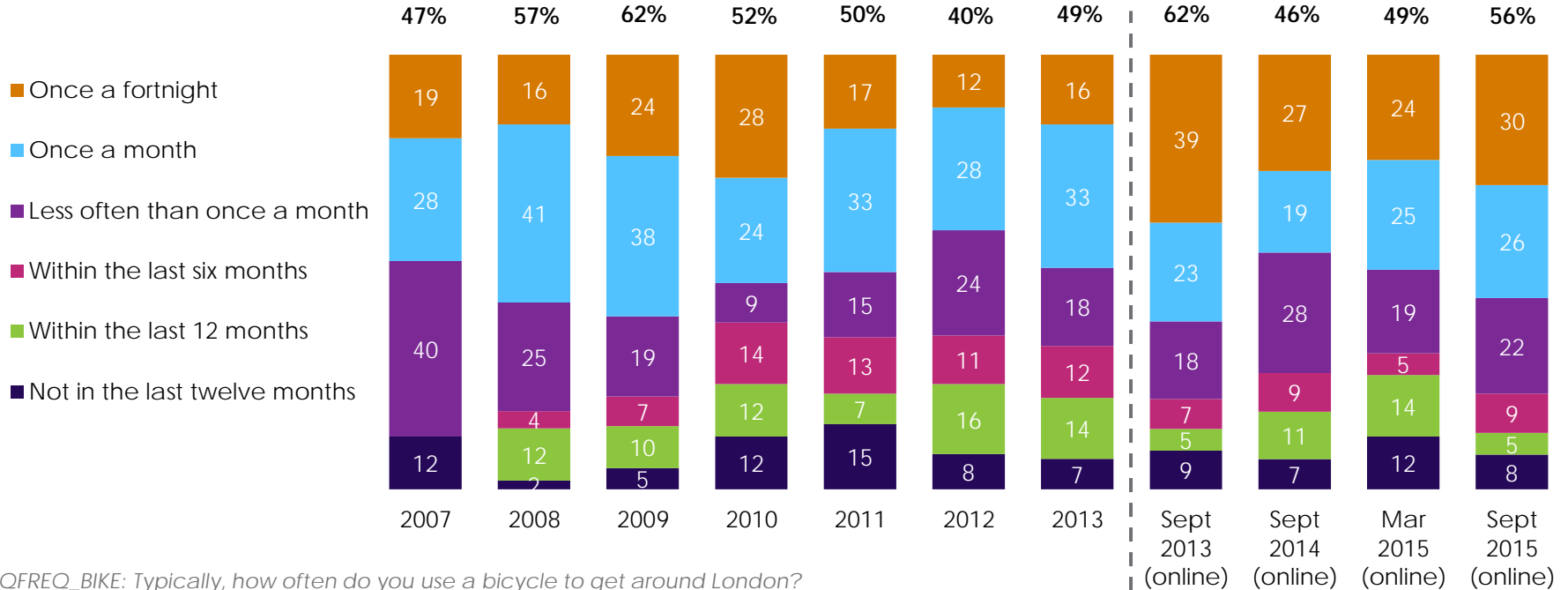
QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London?

Base: Regular cyclists – Sept 2015 (online) (369); Mar 2015 (online) (376), Sept 2014 (online) (395), Sept 2013 (online) (387), 2013 (329), 2012 (292), 2011 (115), 2010 (107), 2009 (121), 2008 (110), 2007 (131)

The proportion of occasional cyclists cycling at least once a month has increased slightly over the last two waves (from 46 per cent in September 2014 to 56 per cent now)

Frequency of cycling among occasional cyclists (trend) – %

At least once a month

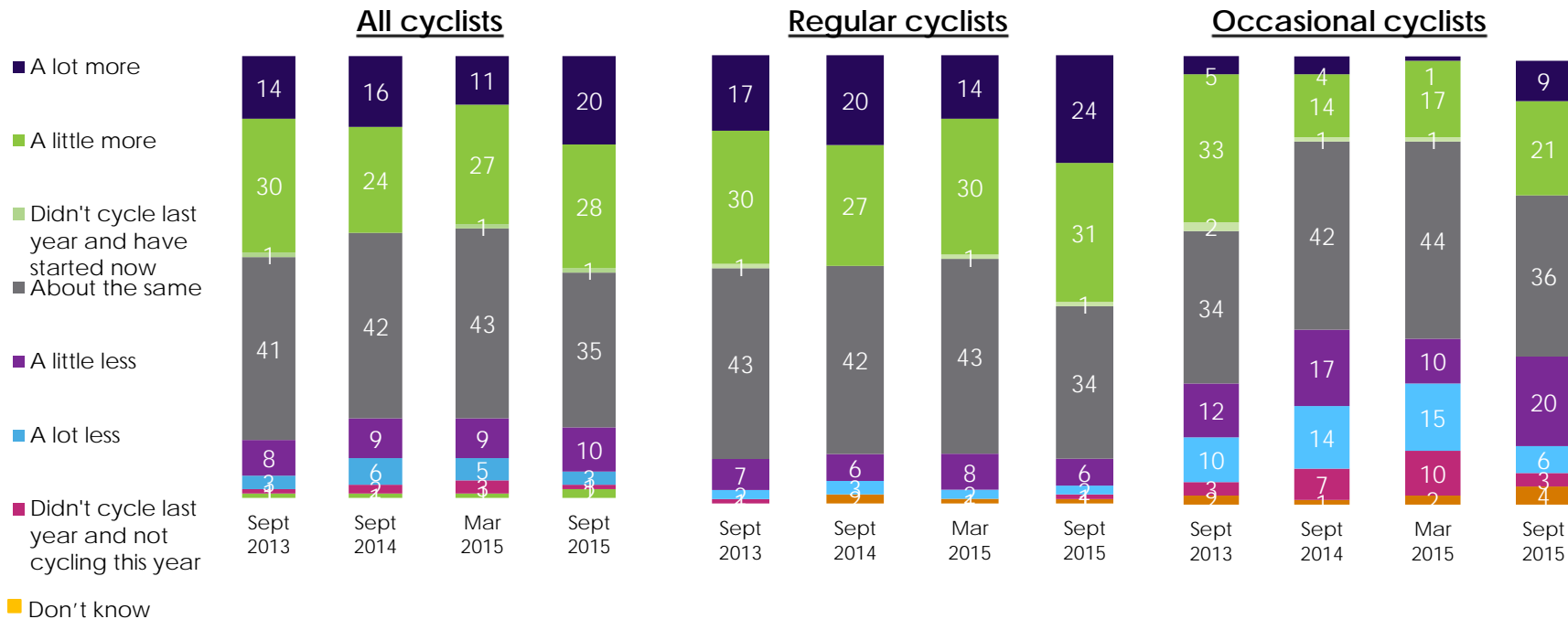


QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London?

Base: Occasional cyclists – Sept 2015 (online) (136); Mar 2015 (online) (130), Sept 2014 (online) (136), Sept 2013 (online) (122), 2013 (203), 2012 (213), 2011 (61), 2010 (49), 2009 (42), 2008 (49), 2007 (57)

Almost half of cyclists (49 per cent) say they are cycling more this year than at the same time last year. This rises to 56 per cent of regular cyclists

Frequency of travelling by bike compared with last year – %



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

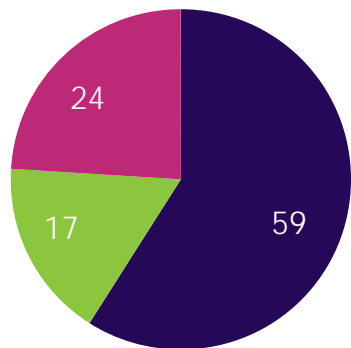
Base: All cyclists – Sept 2015 (online) (505), Sept 2014 (online) (531), Sept 2013 (online) (509); Regular cyclists – Sept 2015 (369), Sept 2014 (online) (395), Sept 2013 (online) (387); Occasional cyclists – Sept 2015 (136), (130), Sept 2014 (online) (136), Sept 2013 (online) (122)



# Six in ten cyclists claiming to be cycling more this year are making more cycling trips, one in six are making longer trips and a quarter are doing both

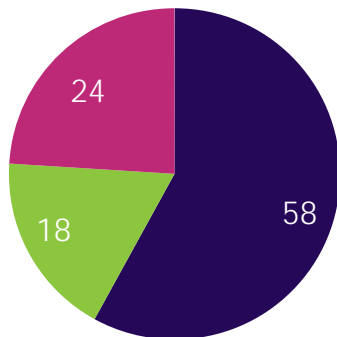
## How cycling more

All cyclists cycling more (%)

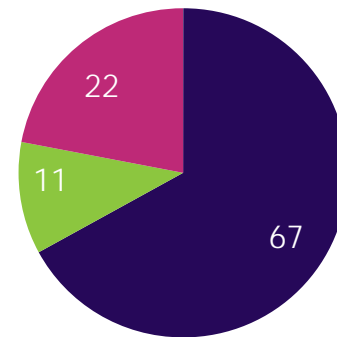


- More trips
- Longer trips
- Both

Regular cyclists cycling more (%)



Occasional cyclists cycling more (%)



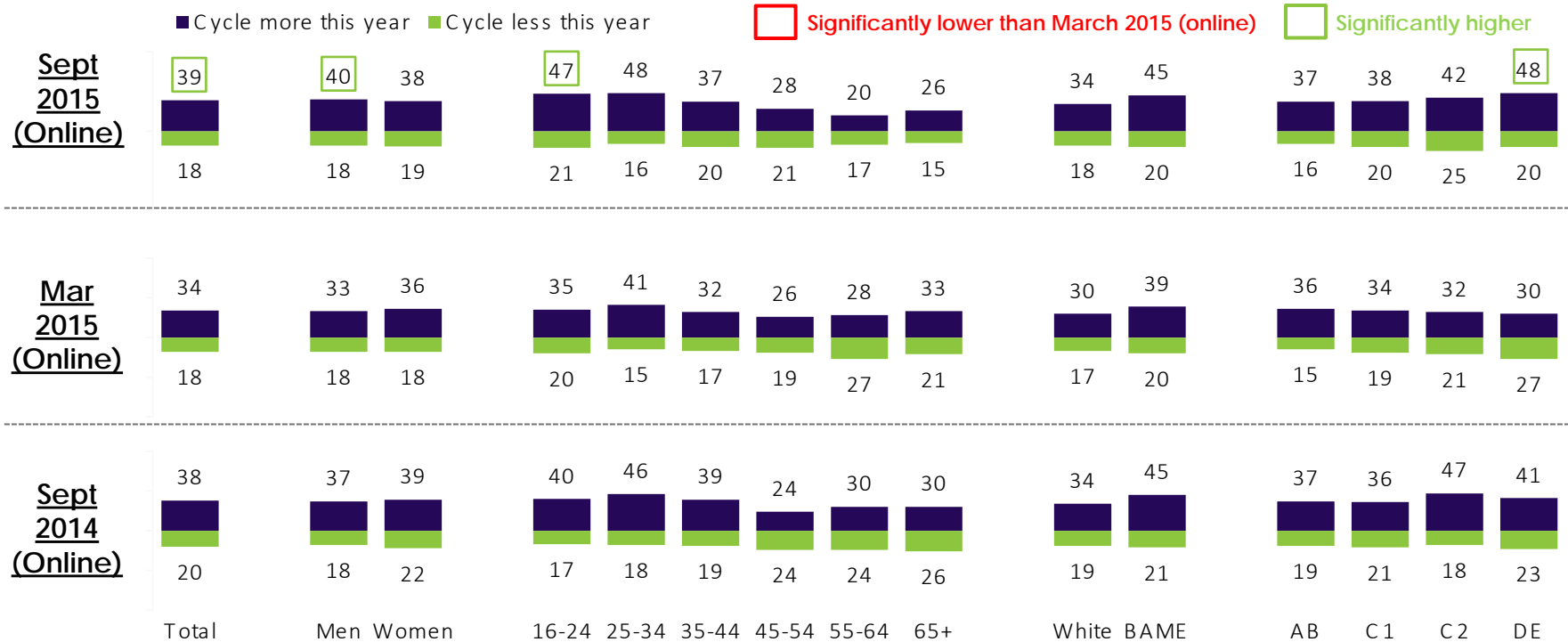
Caution: Low base for occasional cyclists

D1b: You have said you are cycling more. Would you say you are making more trips, longer trips or both?

Base: All cyclists travelling more by bike this year compared with last year- Sept 2015 (online) (221), Regular cyclists (190), Occasional cyclists (31)

Among all Londoners who cycled this year and last able to give an answer, men, the younger age groups (16-35), White and BAME Londoners and social class groups C2DE are more likely to be saying they are cycling more compared with last year

## Frequency of travelling by bike compared with last year - %



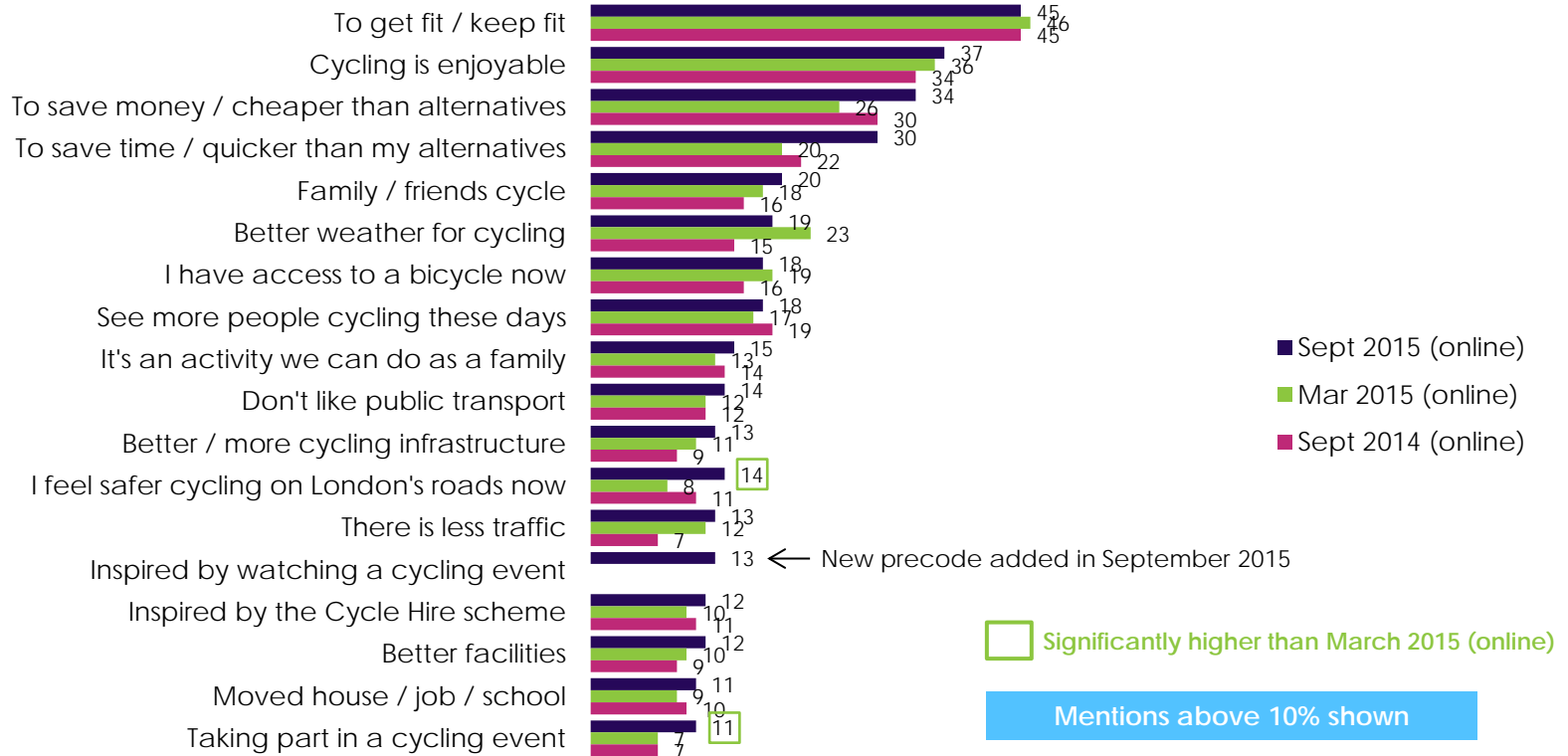
D1. How do you think the amount you cycle in London is compared to this time last year? Would you say you now cycle...?

Base: All excluding those who did not cycle this year or last and DK Sept 2015 (online) (1,309)

Details of SEG definitions can be found in the appendix

# Fitness remains the most common reason for cycling more this year. Also important are the enjoyment of cycling, to save money and to save time

## Reasons for cycling more – %



D2. What are the reasons that you have started cycling more this year?

Base: all cycling more Sept 2015 (online): 461, Mar 2015 (online): 429, Sept 2014 (online): 462

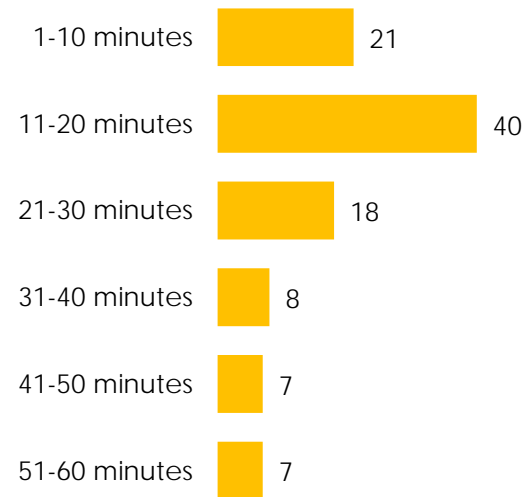
Those motivated to cycle more to save money expect to save anything up to £50+ a month. Four in ten motivated by time savings save between 11 and 20 minutes a day and a further four in ten are saving more than 20 minutes

## Money and time savings by cycling more

D2a (Expected) savings a month - %



D2b Time saved (on a typical day) - %



D2a. How much do you think you save/ do you expect to save per month? Base: All cycling more to save money Sept 2015 (online) (156)

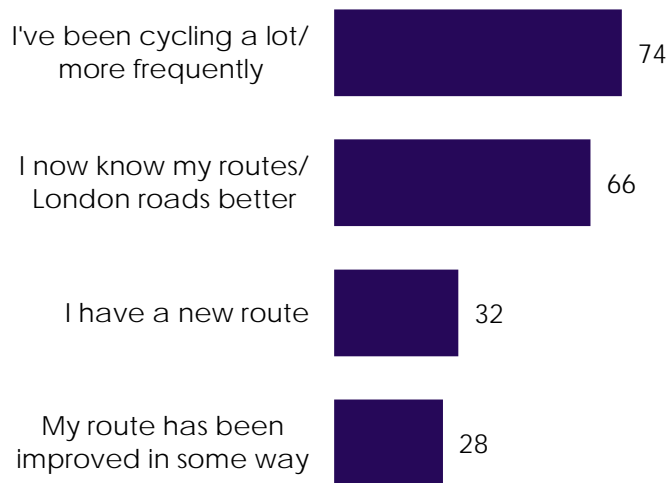
D2b. On a typical day, how much time do you save by using a bicycle? (e.g. 5 minutes on each leg of a return journey = 10 minutes)

Base: All cycling more to save time Sept 2015 (online) (113)

Those motivated to cycle more because they feel safer, feel safer mainly because they have been cycling a lot or more frequently and know their route/ London's roads well or have become more knowledgeable

## Why feel safer

### D2c Why feel safer - %



D2c. Which, if any, of the following reasons for feeling safer on London's roads apply to you? I feel safer because ....

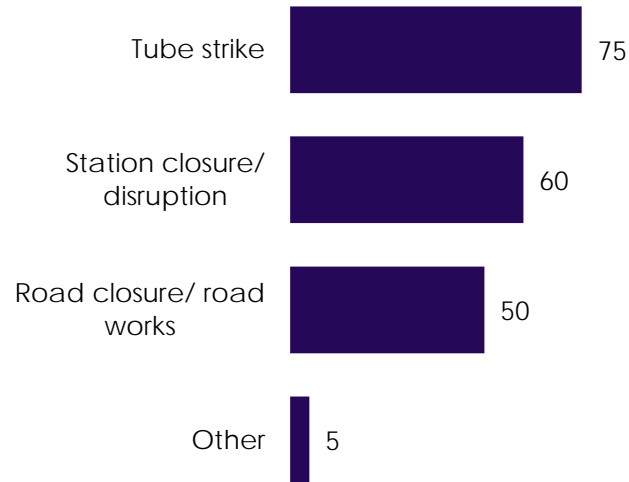
Base: All cycling more because they feel safer on London's roads now Sept 2015 (online) (61)



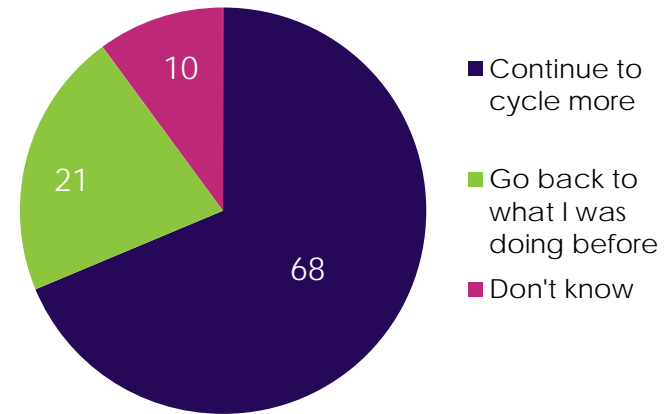
Three quarters of those cycling more because of a disruption mentioned Tube strikes and two thirds mentioned station closure. Seven in ten of those switching to cycling because of disruptions will continue to cycle more after the disruption ends

Disruptions to usual journey and whether will continue to cycle more after disruption is over

D2e Disruptions to usual journey - %



D2g Whether will continue to cycle more - %



D2e. Which of the following types of disruption did you face?

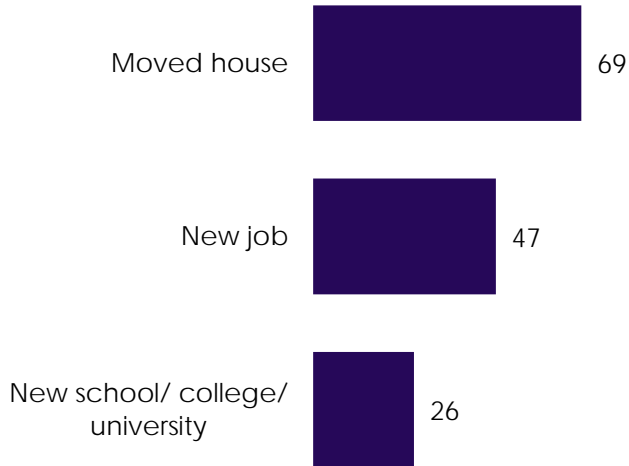
D2g. Will you (or did you) continue to cycle more once the disruption has/ had ended or will you go back to what you were doing before the disruption?

Base: All cycling more because of disruption to their usual journey Sept 2015 (online) (41\*) \*caution – low base size

Those cycling more because of a change in circumstance are most likely to mention moving home (69 per cent). Half have a new job and a quarter, a new place of education

## Changed circumstances

D2g Changed circumstances - %

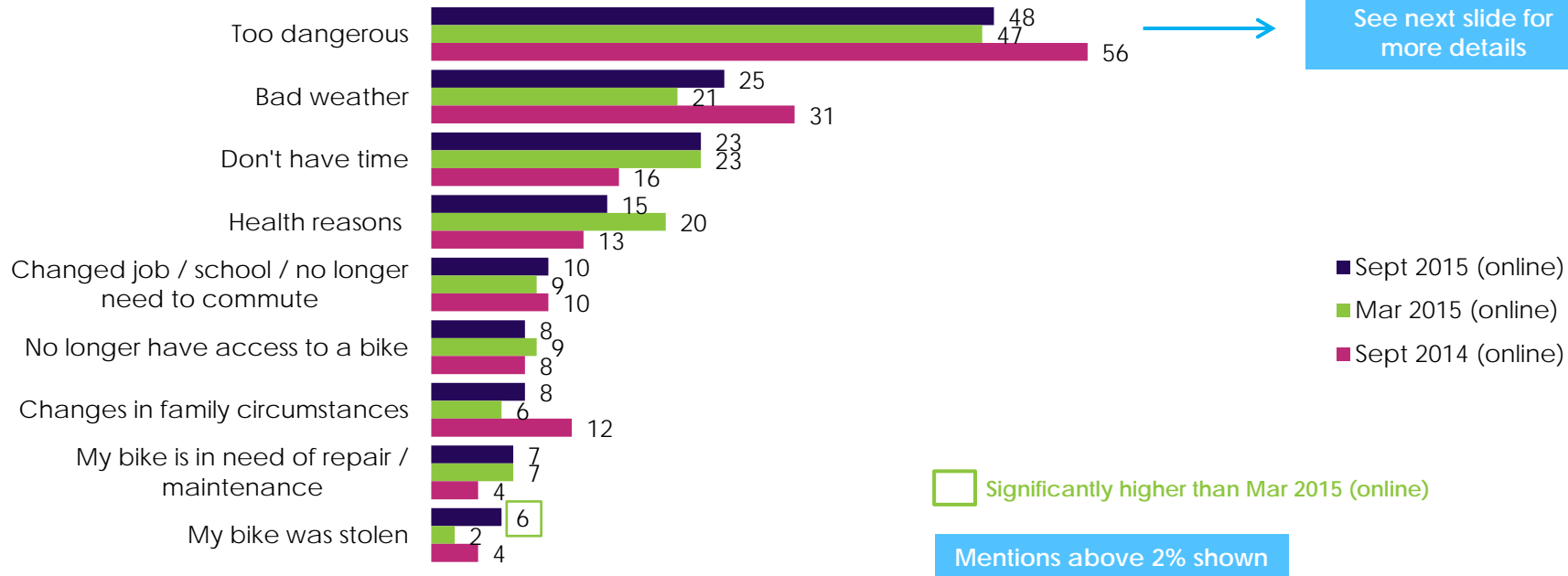


*D2h. You said that a change in circumstance has meant you are now cycling more. Did you move house, get a new job or start a new school?*

*Base: All cycling more because of a change in circumstance Sept 2015 (online) (50)*

The perception that cycling in London is too dangerous is the main reason for people cycling less. Bad weather and lack of time are also important reasons for cycling less

## Reasons for cycling less – %



D4: What are the reasons that you are cycling less this year?

Base: All respondents who are cycling less this year Sept 2015 (online) (214), Mar 2015 (online) (220), Sept 2014 (online) (242)

Busy traffic conditions continue to be the main reason for believing that cycling in London is dangerous. Stories in the press about collisions are still having an impact but it is significantly less marked this September compared with March 2015

Reasons for feeling cycling is dangerous

	Sept 2014 (online) %	Mar 2015 (online) %	Sept 2015 (online) %
Traffic conditions are too busy	69	72	63
Fear collisions	57	54	46
Conflict with other road users - motorists	n/a	n/a	47
Seen press about collisions involving cyclists	49	61	38
Witnessed a collision	31	32	29
I have had a near miss	26	26	24
Conflict with other cyclists	n/a	n/a	16
I do not know a safe route	20	22	16
I am not confident cycling	25	26	15
Family member / friend was involved in a collision or near miss	n/a	n/a	9
I have had a collision	10	6	8
Other road users' attitude to cyclists / inconsiderate	1	4	2
Other cyclists / poor attitude / lack of road safety knowledge	n/a	n/a	2

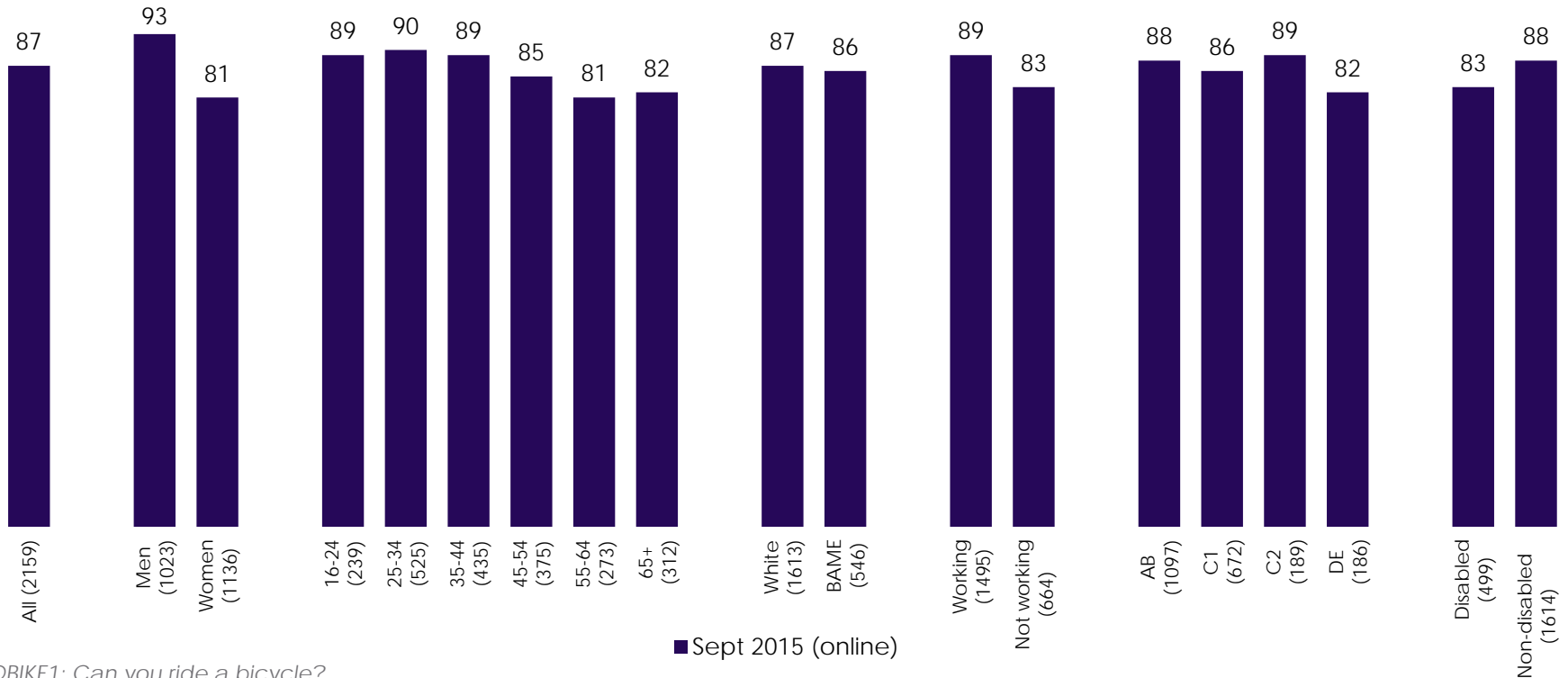
Significantly lower than Mar 2015 (online)

D5: Why do you feel that cycling is dangerous?

Base: All respondents who are cycling less this year because it is dangerous Sept 2015 (online) (100), Mar 2015 (online) (103), Sept 2014 (online) (129)

# Almost nine in ten Londoners know how to ride a bike; men, those aged under 45 and those in employment are the most likely to be able to cycle

Percentage able to ride a bike (2015) – %



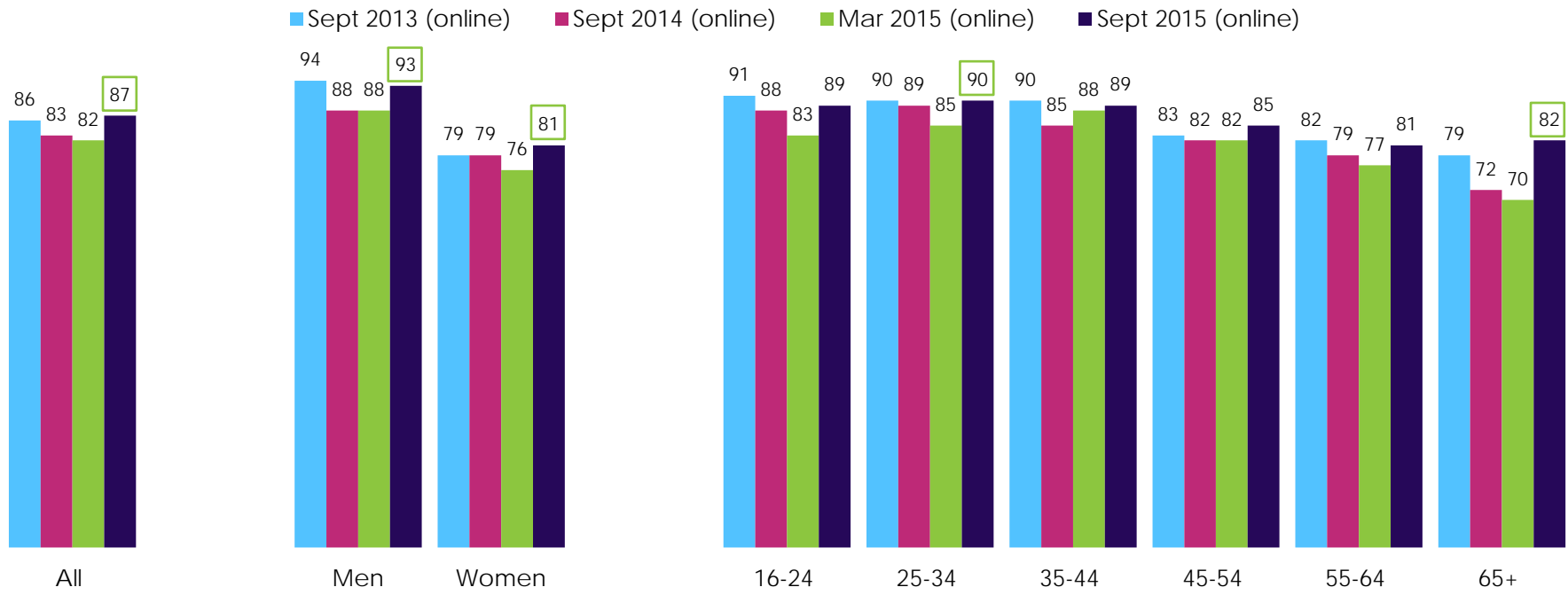
QBIKE1: Can you ride a bicycle?

Base: All respondents Sept 2015 (online) (2159)



A significantly higher proportion of Londoners know how to ride a bike this wave (up from 82 per cent in March to 87 per cent now). Increases are significant among both men and women and the 25-34 and 65+ age groups

Percentage able to ride a bike (trend) – %



  Significantly higher than Mar 2015 (online)

QBIKE1: Can you ride a bicycle?

Base: All respondents Sept 2015 (online) (2159), Mar 2015 (online) (2241), Sept 2014 (online) (2192), Sept 2013 (online) (1333)





# The proportion able to ride a bike has risen significantly among almost all other demographic groups

Percentage able to ride a bike (trend) – %



  Significantly higher than Mar 2015 (online)

QBIKE1: Can you ride a bicycle?

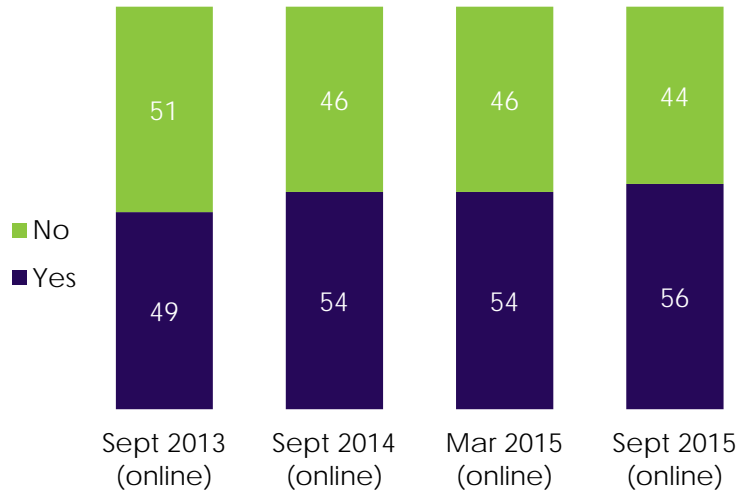
Base: All respondents Sept 2015 (online) (2159), Mar 2015 (online) (2241), Sept 2014 (online) (2192), Sept 2013 (online) (1333)



# Over half of Londoners (56 per cent) have access to a bike in their household, consistent with the last two waves

## Access to a bike in the household

Access to a bike in the household -%



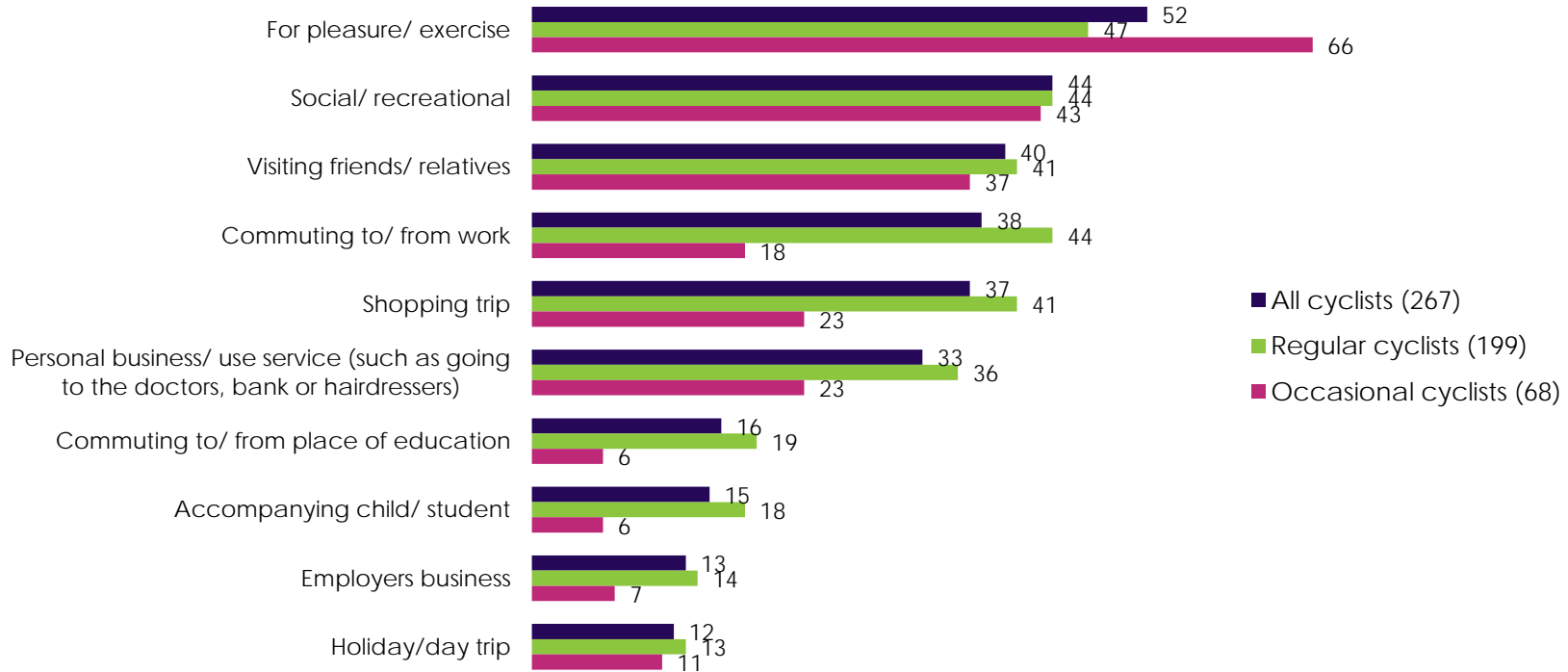
QACCESS1: Does your household have access to a bicycle, even if you don't currently use it?

Base: all – Sept 2015 (online) (2159), Mar 2015 (online) (2241), Sept 2014 (online) (2192), Sept 2013 (online) (1333)



# Cycling for pleasure/ exercise, for social or recreational reasons and to visit friends and relatives remain the most common types of trips made by bike

## Cycling for different journey purposes – %

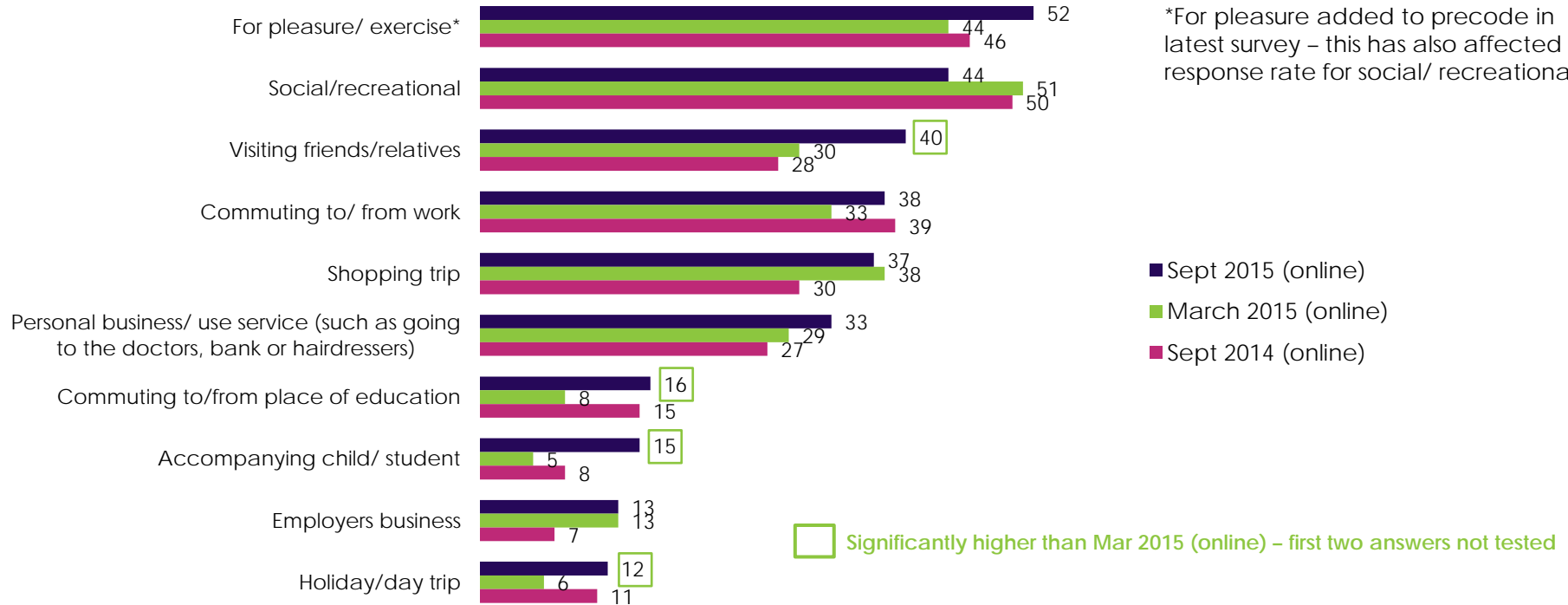


F1: What types of journey do you make by bicycle?

Base: All cyclists Sept 2015 (online) (267)

# Significantly more cyclists are visiting friends and relatives by bike in the latest survey. Commuting to school/ college and accompanying a child are also up

## Cycling for different journey purposes over time – %

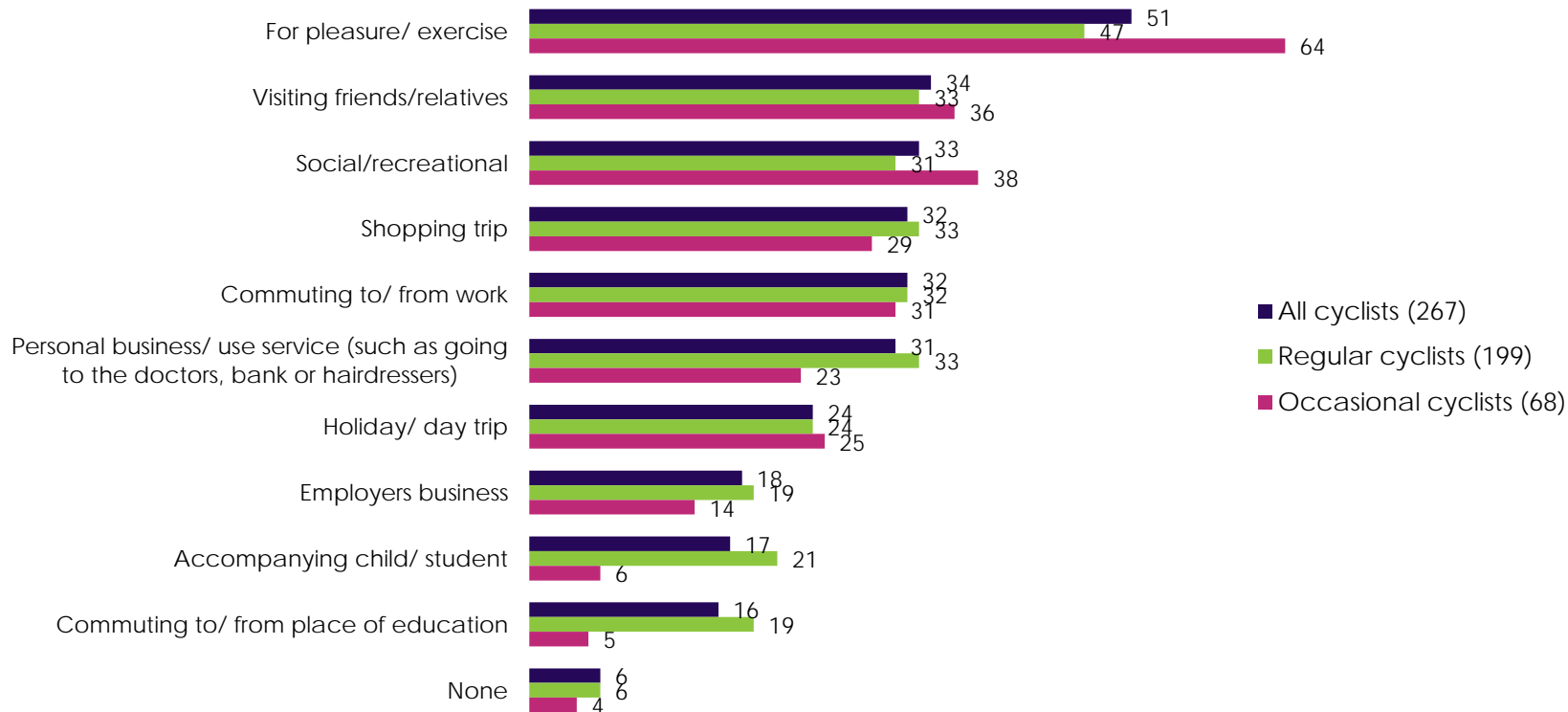


F1: What types of journey do you make by bicycle?

Base: All cyclists Sept 2015 (online) (267), March 2015 online (284), Sept 2014 (online) (271)

# Half of cyclists (approaching two thirds of those who ride occasionally) would like to cycle more than they do currently for pleasure or exercise

## Desire to cycle for different journey purposes – %



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

Base: All cyclists Sept 2015 (online) (267)



Too much traffic, lack of time and lack of confidence in cycling are the main obstacles to cycling more among cyclists who only cycle for sport, leisure or exercise. Lack of time has increased significantly as a barrier to making more trips other than for sport, leisure or exercise

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



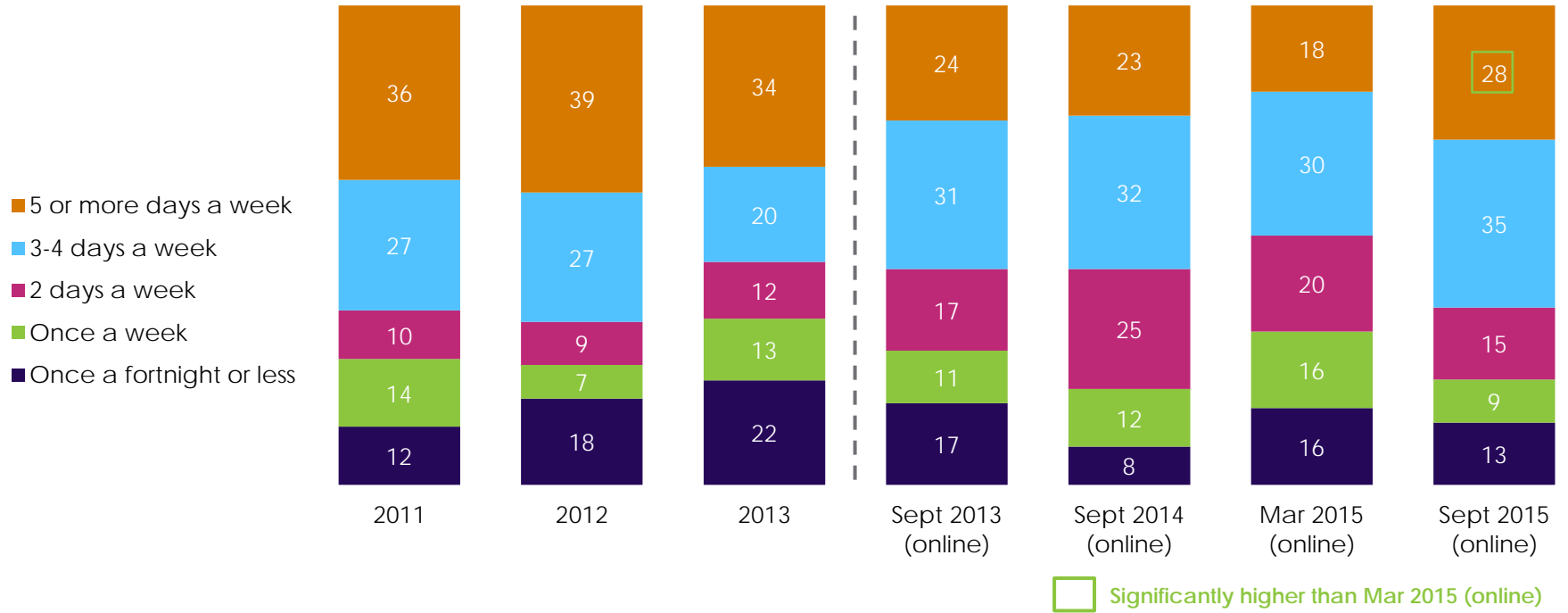
F2: What stops you from cycling for trips other than sport, fun or exercise?

Base: All cyclists who only cycle for sport, leisure or exercise Sept 2015 (online) (38), Mar 2015 (online) (45), Sept 2014 (online) (41)



# The frequency with which commuting cyclists commute by bike has increased in the latest survey with over six in ten doing so at least 3 times a week

## Frequency of commuting by bike – %



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

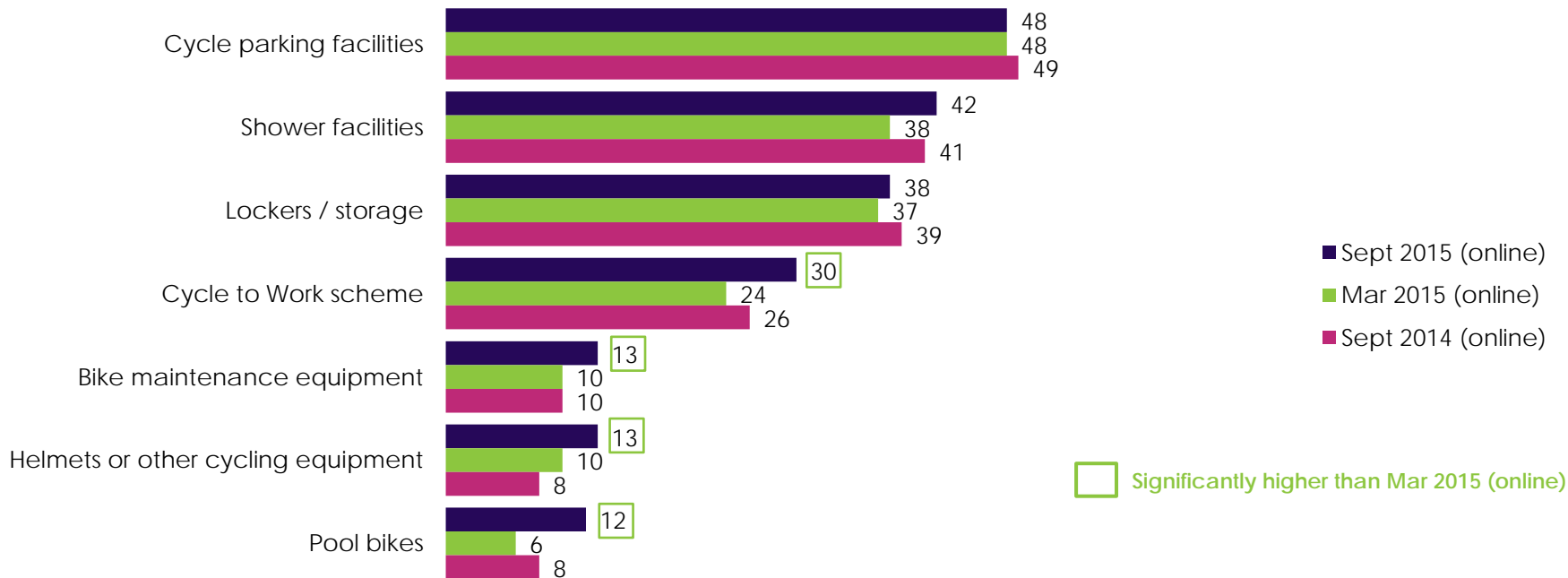
Base: Those commuting by bike Sept 2015 (online) (117), Mar 2015 (online) (178), Sept 2014 (online) (137), Sept 2013 (online) (271), 2013 (234), 2012 (165), 2011 (58)





# There have been significant rises in the proportions claiming the Cycle to Work scheme, bike maintenance equipment, helmets and pool bikes are available at work in the September 2015 survey

## Cycling facilities at work – %

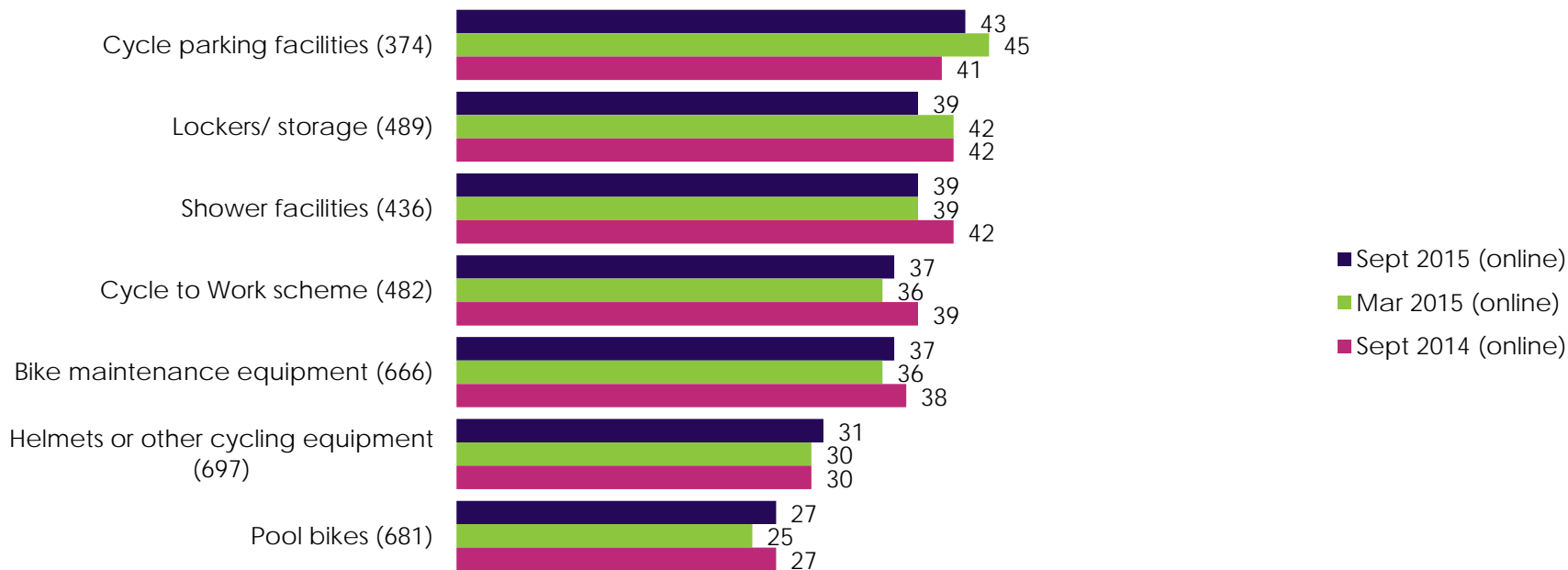


G5: Does your employer/ place of education provide any of the following...?

Base: Those who work or are in education or who commute in London – Sept 2015 (online) (885), Mar 2015 (online) (1004), Sept 2014 (online) (919)

# Additional cycle parking, lockers, shower facilities, the Cycle to Work scheme and bike maintenance equipment are facilities that would encourage over a third of those who currently don't have these facilities, to cycle to work more

## Cycling facilities that would encourage cycling – %



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

Base: All respondents who work or are in education or who commute in London and are not provided with facilities Sept 2015 (online)  
(Base sizes shown in chart)



Children's cycling





# Children's cycling – summary of key findings

- Among Londoners with children under 16, access to bikes is slightly down compared to last wave (62 per cent of their children have access to bikes) but the proportion of children with access who cycle to school regularly is slightly up (now 28 per cent)
- The main reasons given by parents for their children not cycling to school are they are not old enough (33 per cent) and they are concerned about traffic/ collisions (28 per cent)





# The proportion of children regularly cycling to school appears to be steadily increasing

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

**Whether child has access to a bike – %**



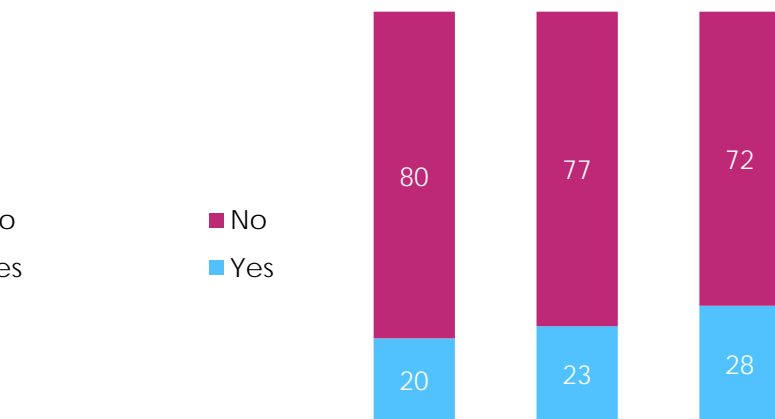
Base: all children under 16

Sept 2014 (online)

Mar 2015 (online)

Sept 2015 (online)

**Whether child cycles to school regularly – %**



Base: all children under 16 with access to a bike

Sept 2014 (online)

Mar 2015 (online)

Sept 2015 (online)

**29% of all respondents have at least one child under the age of 16 living in their household (28% in March 2015)**

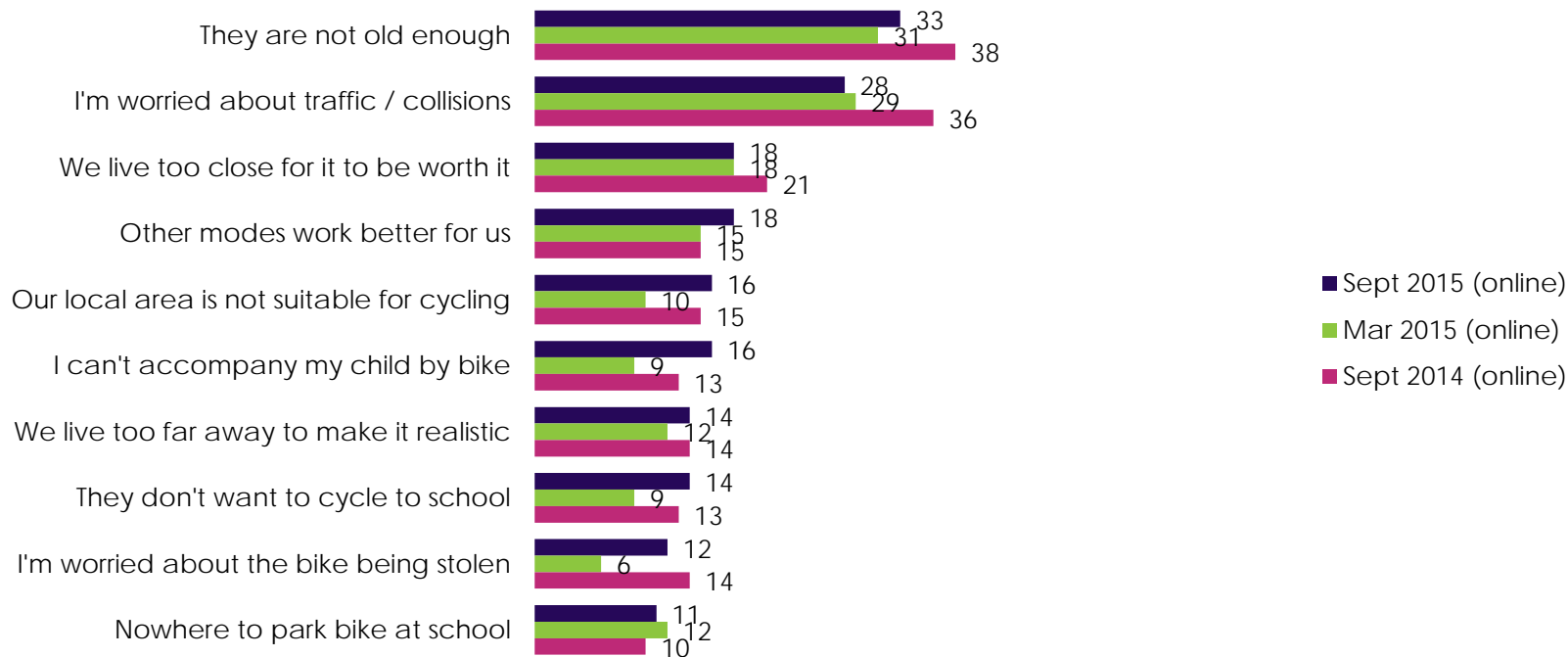
G7: How many children under the age of 16 live in your household? Base: All – Sept 2015 (online) (1165), Mar 2015 (online) (1213), Sept 2014 (online) (1180)

G9: Whether they have a bike (or access to a bike) Base: All children of respondents – Sept 2015 (online) (497)

G10: Whether cycle to school at least once a week Base: All children of respondents, with access to a bike – Sept 2015 (online) (220)

# Not being old enough and concerns about traffic/ collisions remain the key barriers to children cycling to school according to parents

Reasons why child does not regularly cycle to school – %



G11: Why doesn't your child/don't your children cycle to school?

Base: All whose children own a bike but do not cycle to school regularly Sept 2015 (online) (259), Mar 2015 (online) (272), Sept 2014 (online) (294)



Behaviour change



# Behaviour change model – definitions

- The behaviour change model categorises cyclists and non-cyclists into broad behavioural groupings
- Londoners are presented with a number of statements regarding the possibility of cycling more (such as “thinking about doing this”) and must choose the one which most applies to them
- The behavioural groupings are based on responses to these statements, a full list of which is found on the next slide
- The statements do not represent a linear progression, and Londoners may move between any of the groups over time



# Behaviour change model – definitions

	Grouping	Proportion of cyclists				Proportion of non-cyclists			
		Sept 2013 (online)	Sept 2014 (online)	Mar 2015 (online)	Sept 2015 (online)	Sept 2013 (online)	Sept 2014 (online)	Mar 2015 (online)	Sept 2015 (online)
You have never thought about it, but would be unlikely to start in the future	Pre-contemplation	-	-	-	-	33%	35%	36%	36%
You have thought about it but don't intend starting in the future	Pre-contemplation	-	-	-	-	32%	34%	32%	34%
You have never thought about it but could be open to it in the future	Pre-contemplation	7%	7%	9%	12%	15%	13%	14%	12%
You are thinking about starting soon	Contemplation	11%	11%	9%	12%	11%	10%	9%	8%
You have decided to start soon	Preparation	5%	4%	7%	6%	4%	3%	3%	3%
You have tried to start recently, but are finding it difficult so far	Change	5%	6%	5%	4%	-	-	-	-
You have started recently and are finding it quite easy so far	Change	7%	5%	4%	4%	-	-	-	-
You started a while ago and are still doing it occasionally	Sustained change	19%	23%	25%	24%	-	-	-	-
You started a while ago and are still doing it regularly	Sustained change	39%	37%	33%	32%	-	-	-	-
You had started doing this but couldn't stick to it	Lapsed	6%	7%	7%	7%	5%	6%	6%	7%

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

Base: all cyclists in the last 12 months Sept 2015 (online) (505), March 2015 (online) (506), Sept 2014 (online) (531), Sept 2013 (online) (509)/ all not cycled in the last 12 months Sept 2015 (online) (1654), March 2015 (online) (1735), Sept 2014 (online) (1661), Sept 2013 (online) (824)



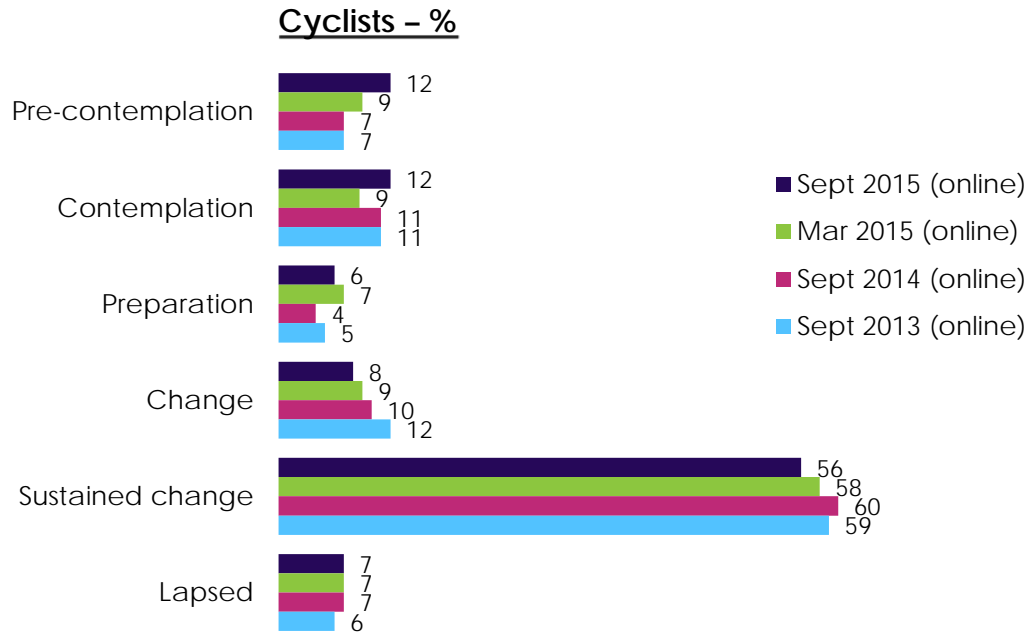
# Behaviour change – summary of key findings

- 56 per cent of cyclists are in the 'sustained change' category (meaning they are already cycling more and are still doing it either regularly or occasionally). This has remained stable over time
- Most non-cyclists (82%) continue to place themselves in the 'pre-contemplation' stage (never thought about cycling more and would be unlikely to or never thought about it but could be open to the idea in the future)
- Seven per cent of cyclists and non-cyclists are in the 'lapsed' category (meaning that they started cycling more, but couldn't stick to it), the same proportion as last wave



# Three fifths of cyclists classify themselves in the 'sustained change' category, in line with previous waves. The 'change' group has been declining while the 'pre-contemplation' group has been growing

## Behaviour change model



- 56 per cent of those who have cycled in the last 12 months are in the 'sustained change' category, meaning they 'started cycling more a while ago and are still doing it either regularly or occasionally', in line with the previous wave
- One in twelve (eight per cent) are in a state of 'change', meaning they 'have tried to start cycling more recently, but are finding it difficult' or 'have started recently and are finding it quite easy so far'
- One in eight (twelve per cent) are categorised as 'contemplating' i.e. thinking about cycling more soon

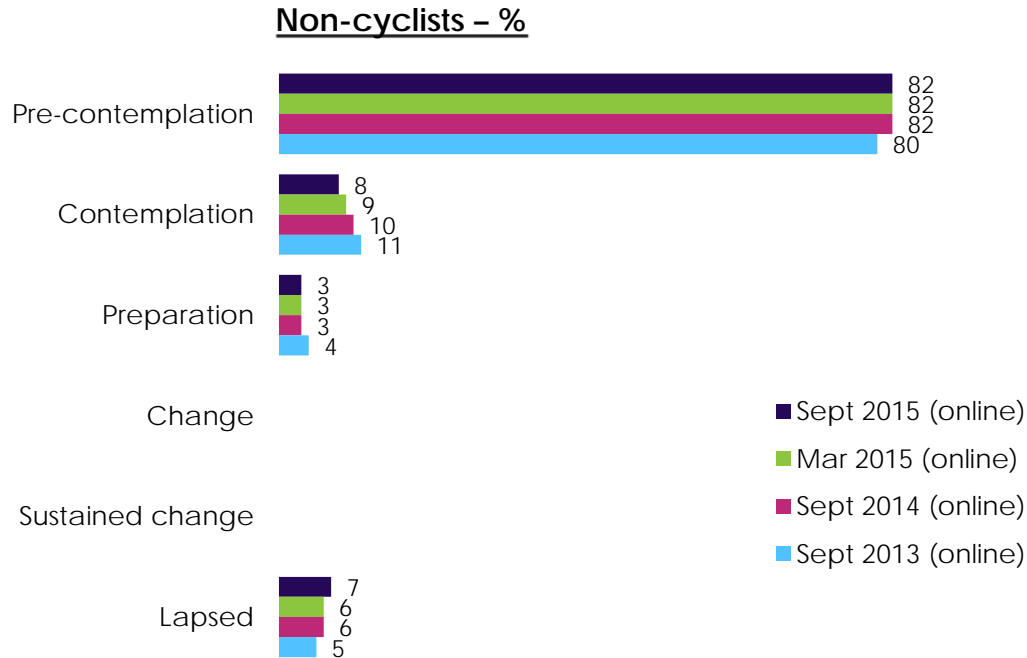
B1: Which of the following would you say applies to you? When thinking about increasing the amount you cycle in London...

Base: all cyclists in the last 12 months Sept 2015 (online) (505), Mar 2015 (online) (506), Sept 2014 (online) (531), Sept 2013 (online) (509)



# Non-cyclists remain most likely to place themselves in the 'pre-contemplation' behaviour change category

## Behaviour change model



- Most of those who have not cycled in the last 12 months (82%) are in the 'pre-contemplation' category, meaning they:
  - 'Have never thought about taking up cycling, and are unlikely to start in the future'
  - 'Have thought about it but don't intend starting in the future'; or
  - 'Have never thought about it but could be open to it in the future'
- Eight per cent of non cyclists are 'contemplating' or thinking about starting soon
- Seven per cent are categorised as 'lapsed', meaning that they 'started cycling more, but couldn't stick to it'

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

Base: all not cycled in the last 12 months Sept 2015 (1654), Mar 2015 (online) (1,735), Sept 2014 (online) (1,661), Sept 2013 (online) (824)



# Motivations and deterrents



# Motivations and deterrents – summary of key findings

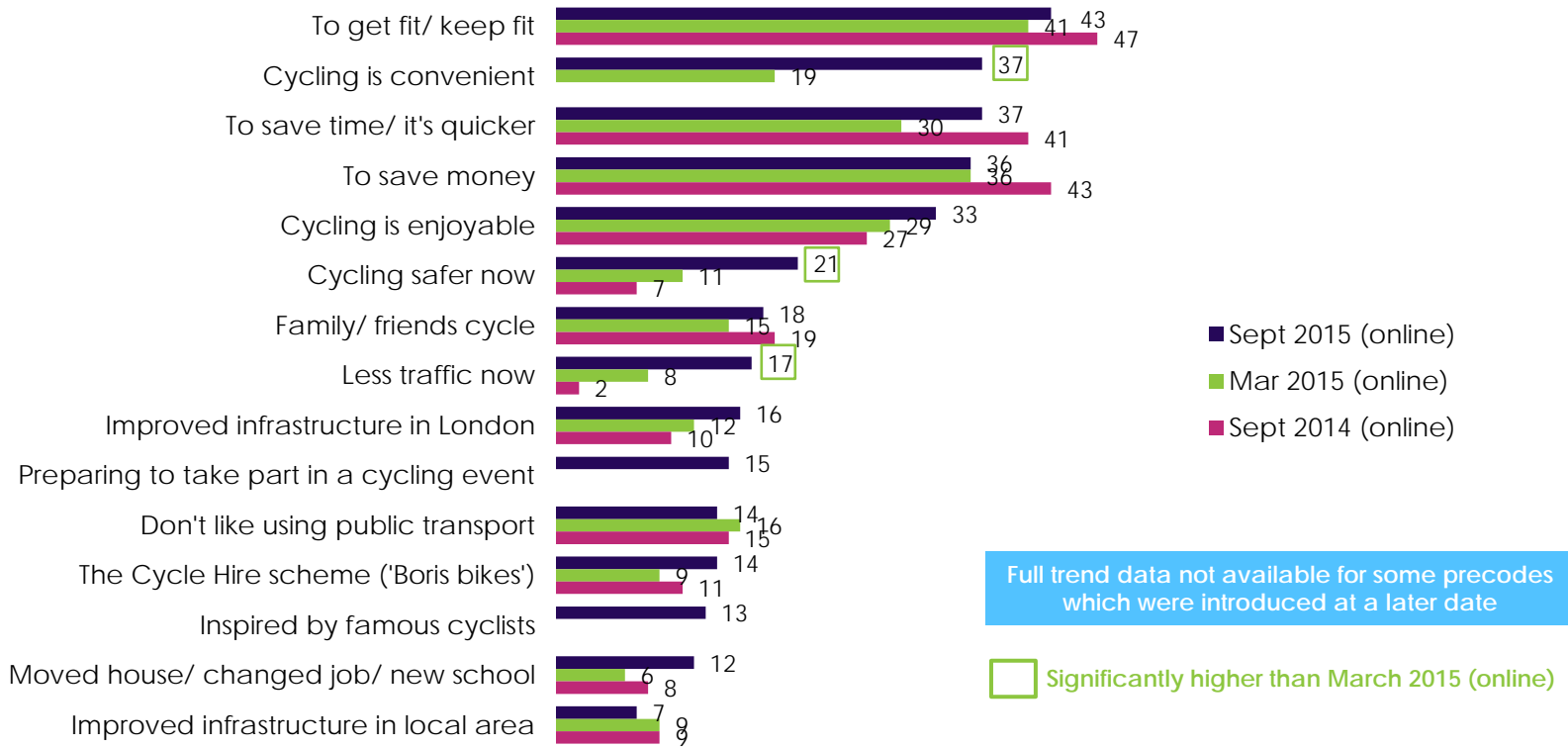
- The key motivation for starting cycling, cycling more and planning to cycle more remains a desire to get fit or keep fit. Other important motivations are the enjoyment of cycling, the convenience of it and saving time and money
- More are giving increased feelings of safety as a reason for cycling more/ considering cycling more
- The majority (78 per cent) of those planning to cycle more have taken practical steps such as making their bike more roadworthy and buying a bike, cycling clothes and equipment
- The main deterrents to taking up cycling or cycling more continue to be perceptions of danger, fear of collisions, too much traffic, fear of having one's bike stolen, lack of time and lack of confidence





# This wave there is an increase in cyclists considering cycling more because it is convenient, safer now and because there is less traffic on the roads

## Motivations for considering cycling more – %



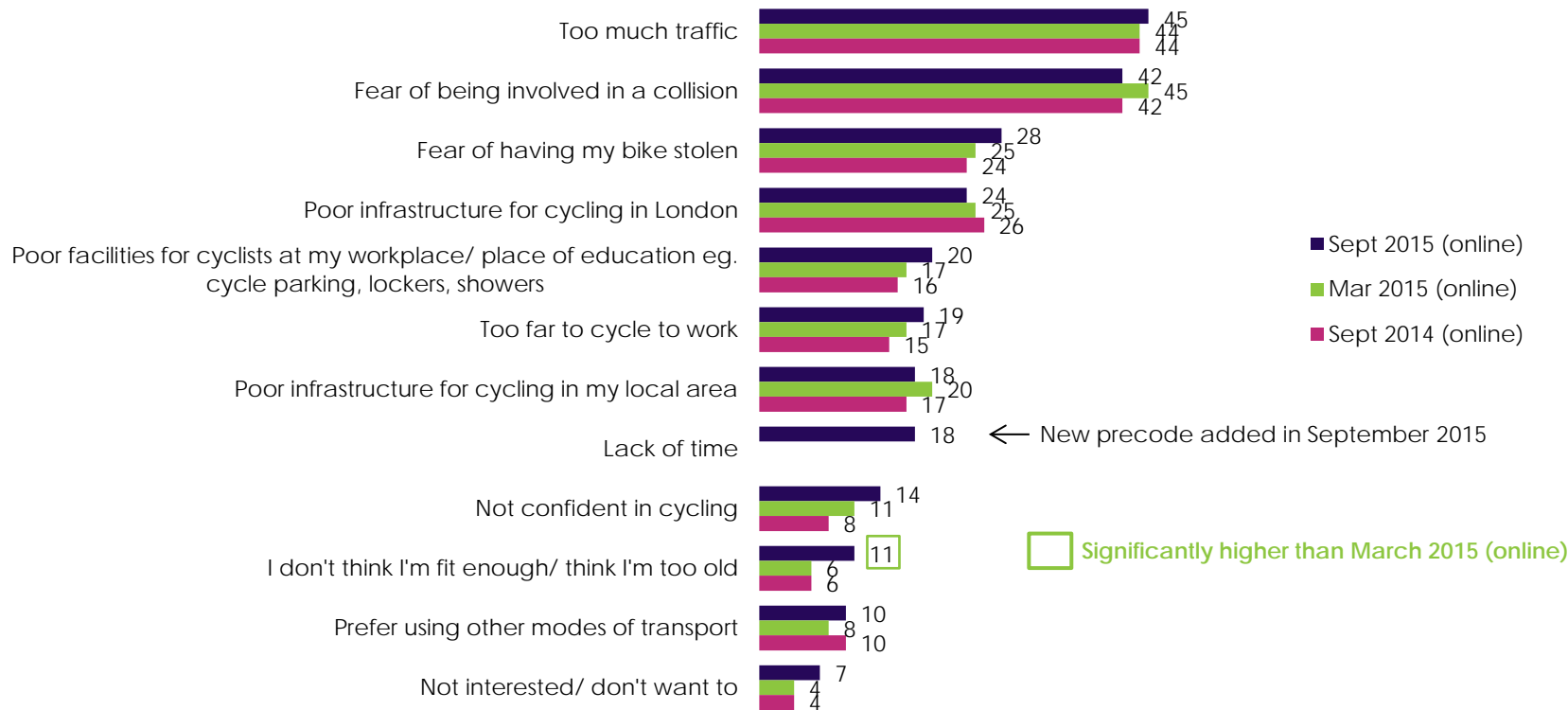
E3: What is making you actively consider cycling more in London?

Base: All cyclists planning to cycle more Sept 2015 (132), Mar 2015 (online) (124), Sept 2014 (online) (105)



# The main deterrents to increased cycling continue to be too much traffic, fear of collisions and fear of having the bike stolen

## Deterrents to cycling more – %

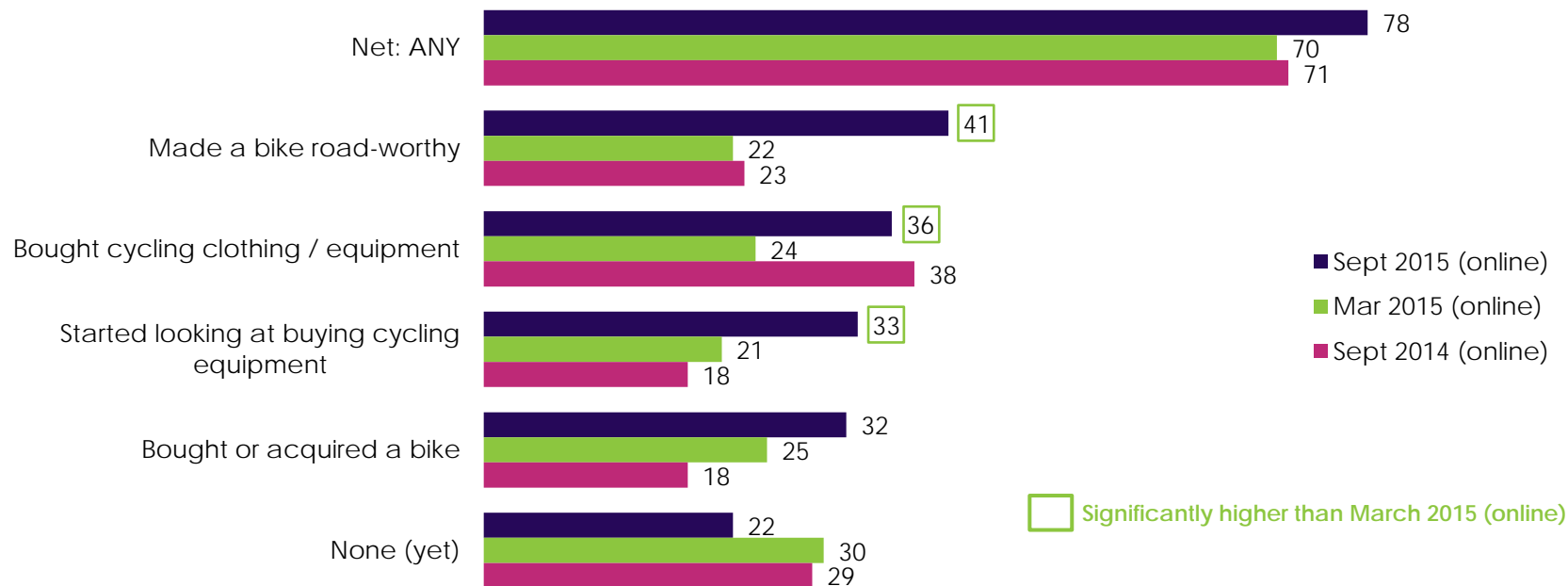


E7: What deters you from cycling more?

Base: All cyclists Sept 2015 (online) (505) Mar 2015 (online) (506), Sept 2014 (online) (509)

Over three quarters of cyclists planning to cycle more over the next 12 months have already taken some kind of step towards doing so. There have been significant rises in those claiming to have made a bike roadworthy and started looking at buying cycling equipment compared to the March 2015 survey

Steps taken towards cycling more – %

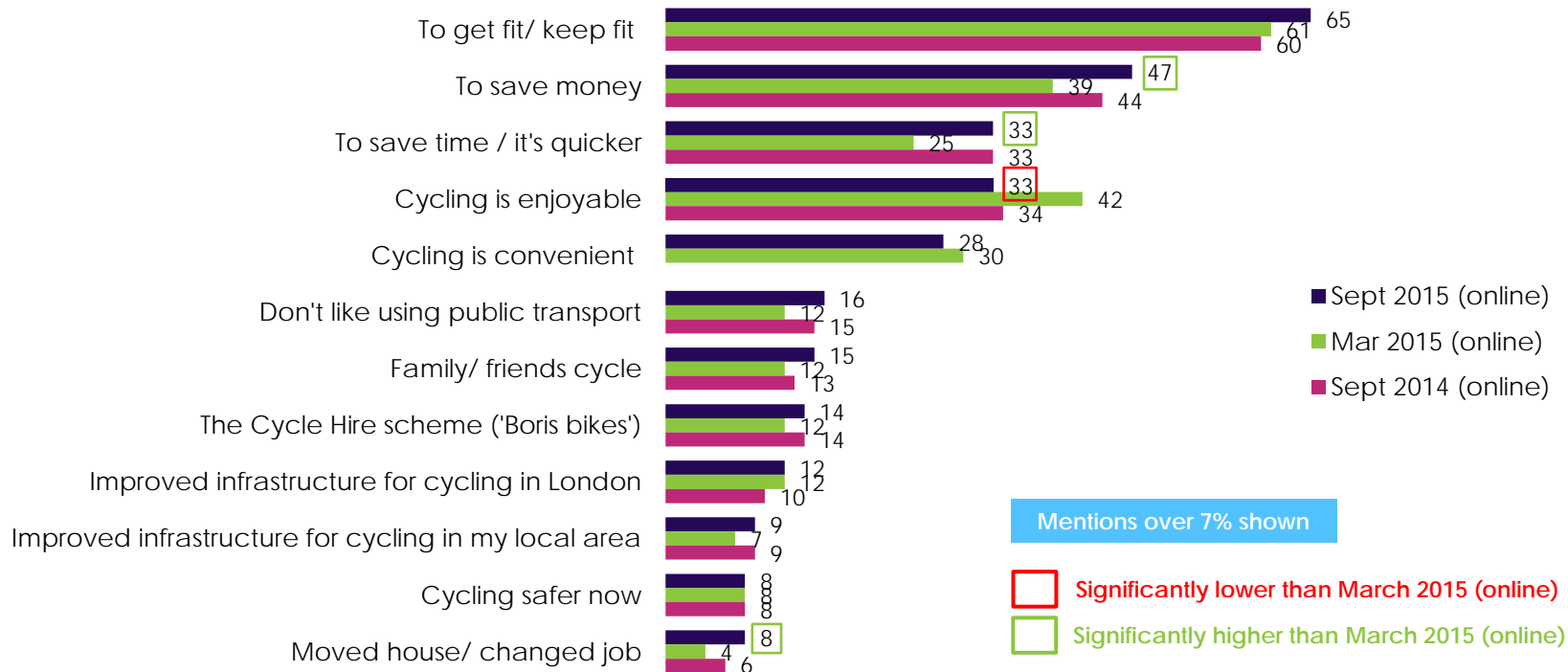


E1: What practical steps, if any, have you taken towards cycling more in the next 12 months?

Base: All cyclists planning to cycle more Sept 2015 (online) (132), Mar 2015 (online) (124), Sept 2014 (online) (109)

As with cyclists, health, money saving and time saving are the most important motivators among non-cyclists thinking about taking up cycling. Saving money and time have become significantly more important since last wave

## Motivations for considering taking up cycling – %



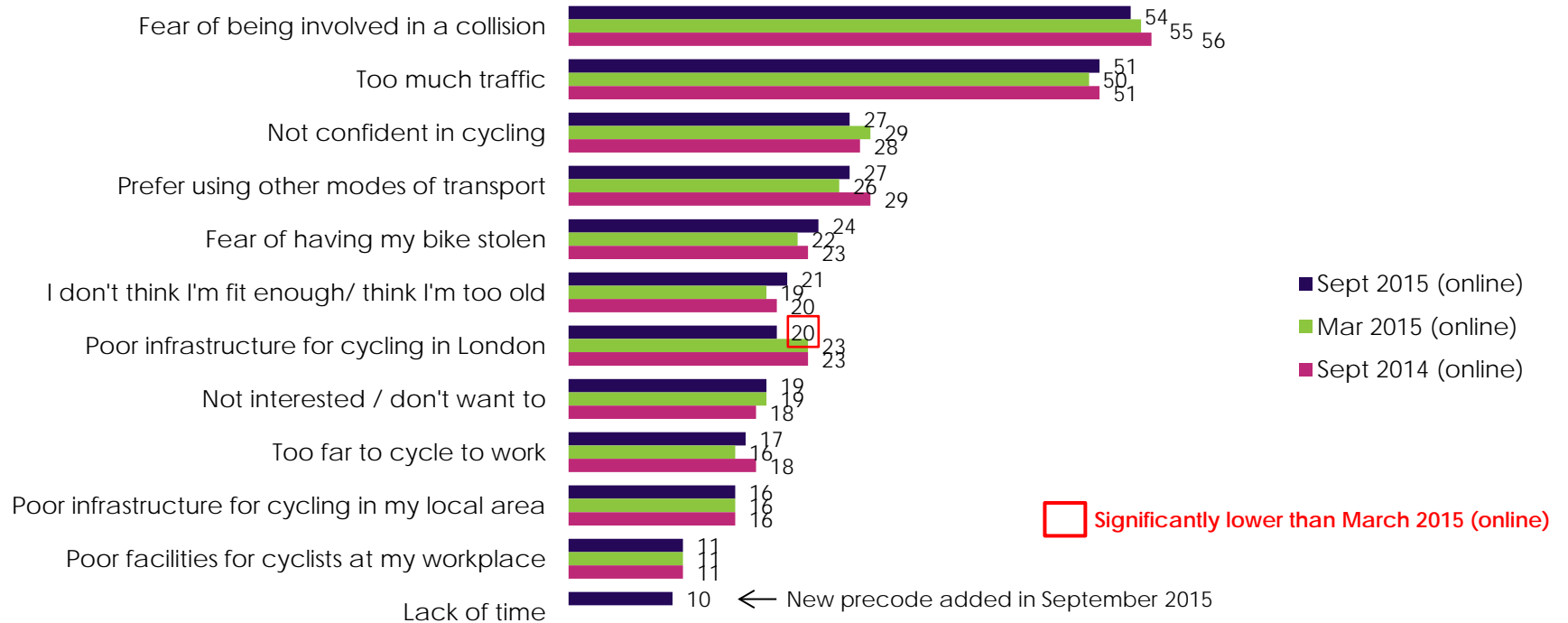
E3: What is making you actively consider taking up cycling in London?

Base: All non-cyclists intending to take up cycling Sept 2015 (online) (358), Mar 2015 (online) (426), Sept 2014 (online) (385)



# Fear of collisions and too much traffic are the main deterrents to taking up cycling

## Deterrents to taking up cycling – %



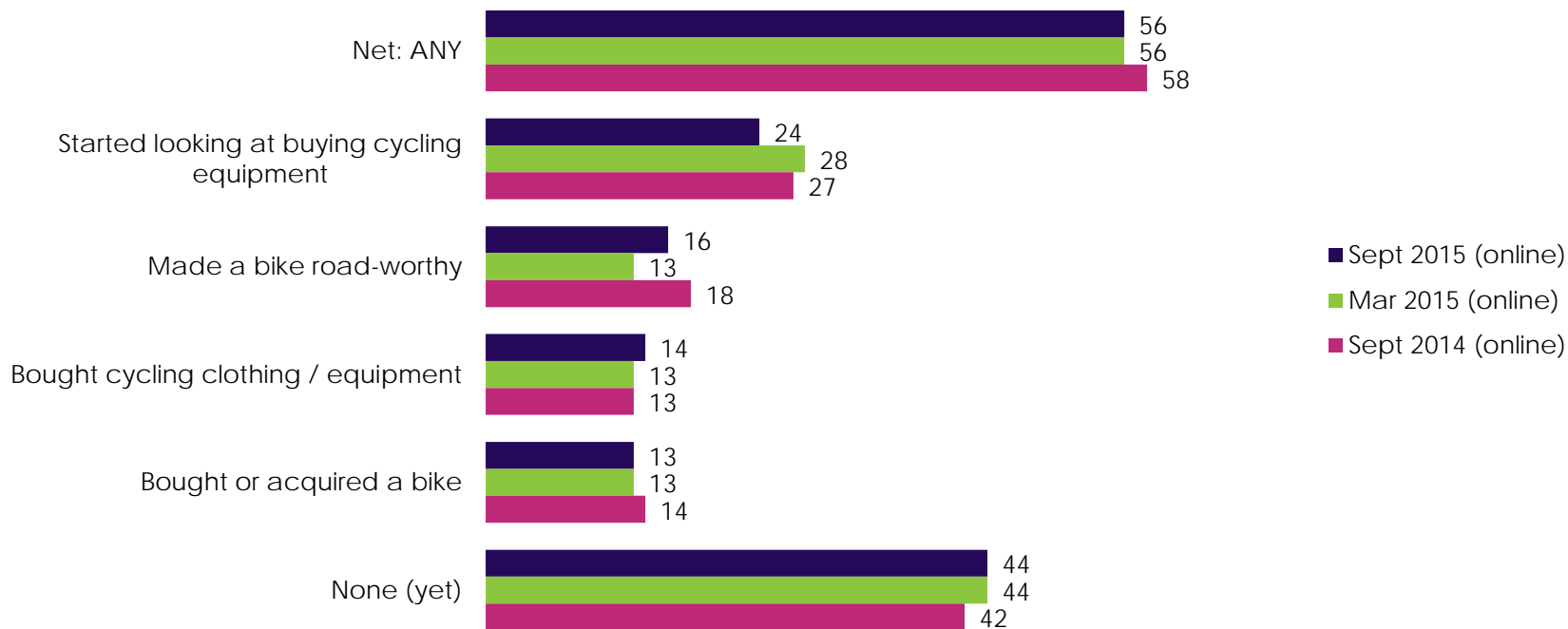
E7: What deters you from taking up cycling?

Base: all non-cyclists Sept 2015 (online) (1654), Mar 2015 (online) (1735), Sept 2014 (online) (1636)



# Over half of non-cyclists who are considering taking up cycling have taken some practical step towards doing so

## Steps taken towards taking up cycling – %



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

Base: All non-cyclists intending to take up cycling Sept 2015 (online) (358), Mar 2015 (online) (426), Sept 2014 (online) (402)



Attitudes to cycling

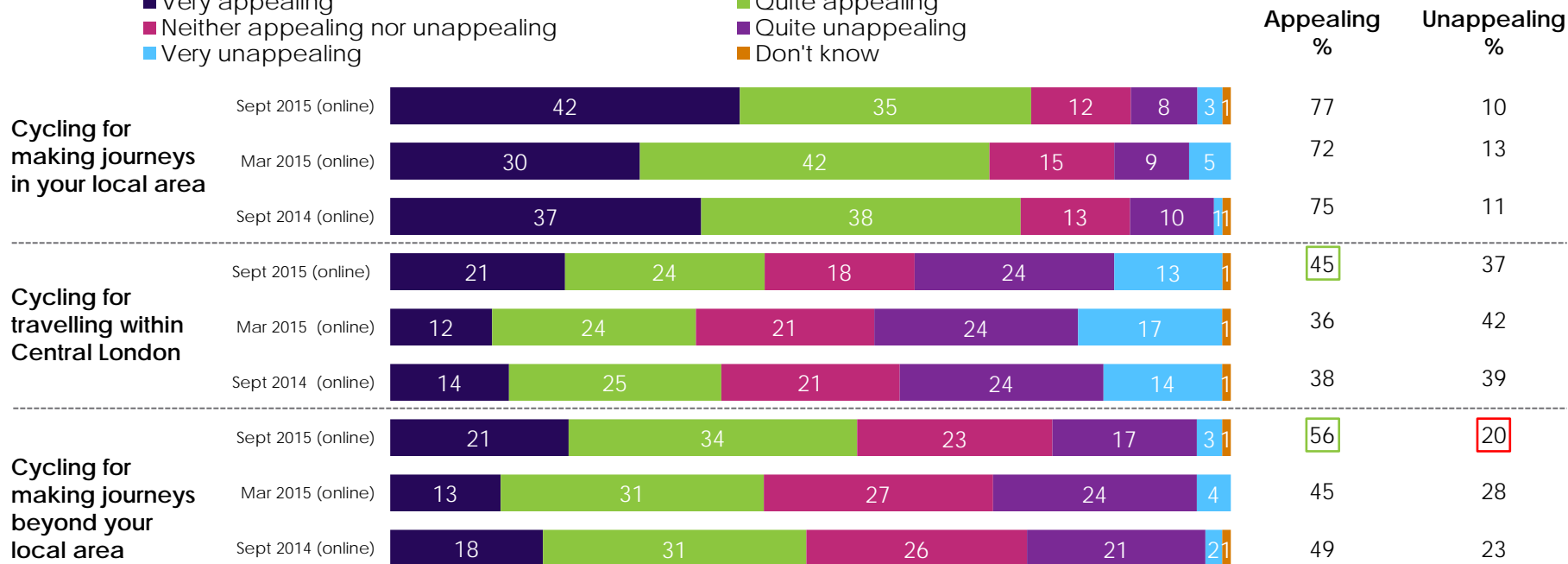
# Attitudes to cycling

- The vast majority of Londoners continue to think that cycling is enjoyable as well as becoming more popular
- Three quarters of Londoners agree that cycling makes a positive contribution to quality of life and is a good social activity. Four in ten would recommend cycling to others
- Cycling is still widely thought of as a convenient way of getting around and the fastest way to travel for short distances
- Six in ten agree that information and signs make it easy to find your way around, that there are good facilities for cyclists in London and that their local area is good for cycling
- Cyclists find all types of journey (in their locality, in Central London and in areas beyond their locality) more appealing in September 2015 compared to March 2015
- Over eight in ten agree that cyclists are vulnerable and traffic makes people afraid of cycling but there are upturns in the proportions agreeing that it is a safe way to get about and they feel confident cycling on London's streets

# Cyclists find cycling in Central London and making journeys beyond their local area more appealing compared to March 2015. Cycling in the local area is still the most appealing

## Appeal of cycling in specific scenarios – cyclists – %

- Very appealing
- Quite appealing
- Neither appealing nor unappealing
- Quite unappealing
- Very unappealing
- Don't know



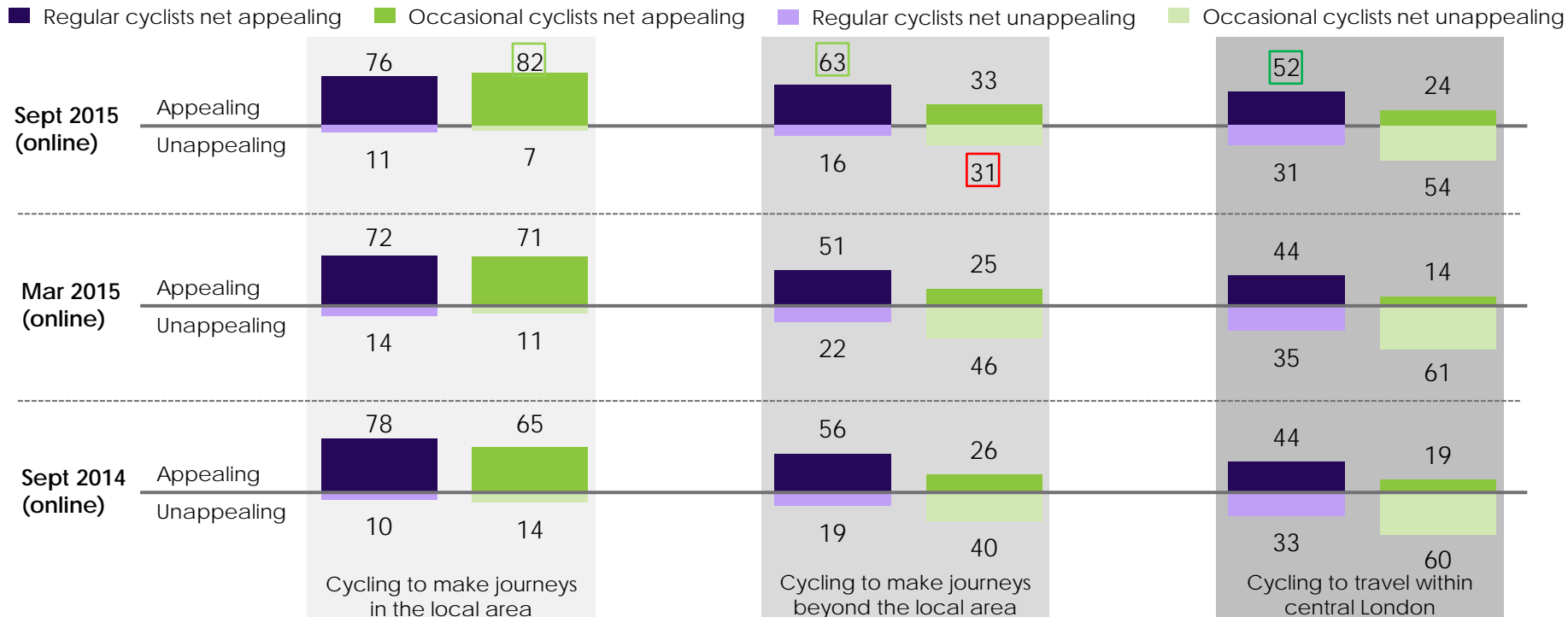
  Significantly lower than March 2015 (online)    
   Significantly higher than March 2015 (online)

A5: How appealing do you find cycling for the following types of journey?

Base: all cyclists who don't find the idea of cycling very unappealing – Sept 2015 (online) (479), Mar 2015 (online) (467), Sept 2014 (online) (491)

Cycling beyond the local area and in Central London have become more appealing to regular cyclists. Cycling in the local area has become more appealing to occasional cyclists

## Appeal of cycling in specific scenarios – cyclists – %



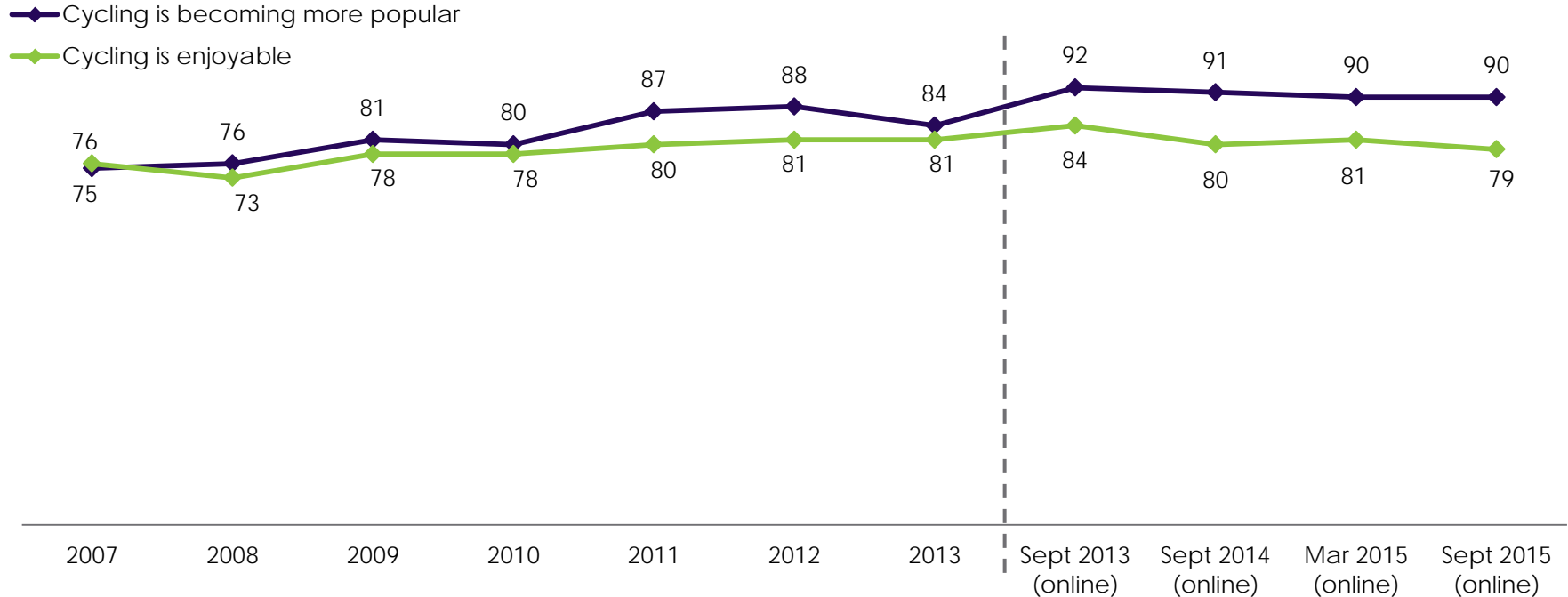
  Significantly lower than March 2015 (online)      Significantly higher than March 2015 (online)

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

Base: regular cyclists who don't find the idea of cycling very unappealing Sept 2015 (online) (352), Mar 2015 (online) (346), Sept 2014 (online) (370) / occasional cyclists who don't find the idea of cycling very unappealing Sept 2015 (online) (127), Mar 2015 (online) (121), Sept 2014 (online) (121)

# Most Londoners continue to think that cycling is enjoyable as well as becoming more popular

Emotional factors – % agree



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

Base: All – Sept 2015 (online) (2159), Mar 2015 (online) (2241), Sept 2014 (online) (2192), Sept 2013 (online) (1333), 2013 (1373), 2012 (1326), 2007-2011 (c.1000)

Three quarters of Londoners agree that cycling makes a positive contribution to quality of life and is a good social activity. Six in ten agree that they would like to be seen cycling and four in ten would recommend it to others

## Social factors – % agree

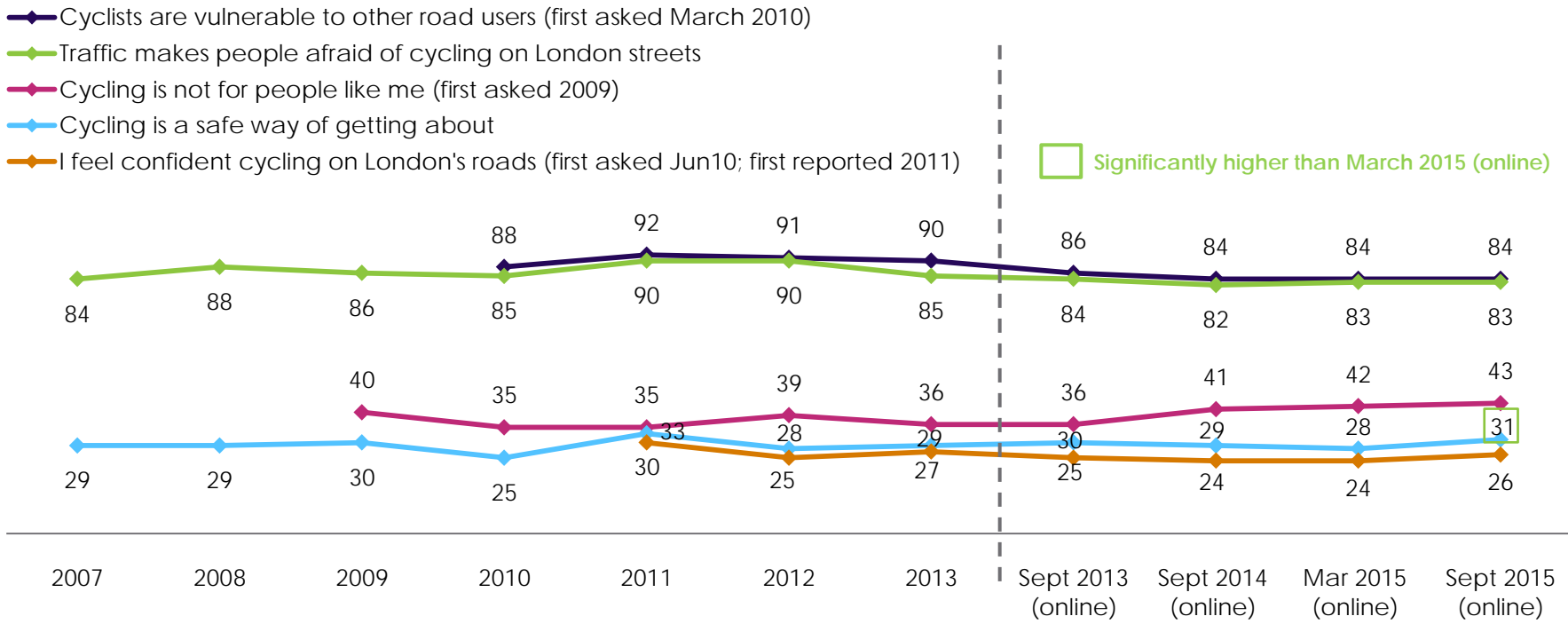


A1: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – Sept 2015 (online) (2159), Mar 2015 (online) (2241), Sept 2014 (online) (2192), Sept 2013 (online) (1333), 2013 (1373), 2012 (1326), 2007-2011 (c.1000)

# Still over eight in ten agree that cyclists are vulnerable and traffic makes people afraid of cycling

## Confidence factors – % agree



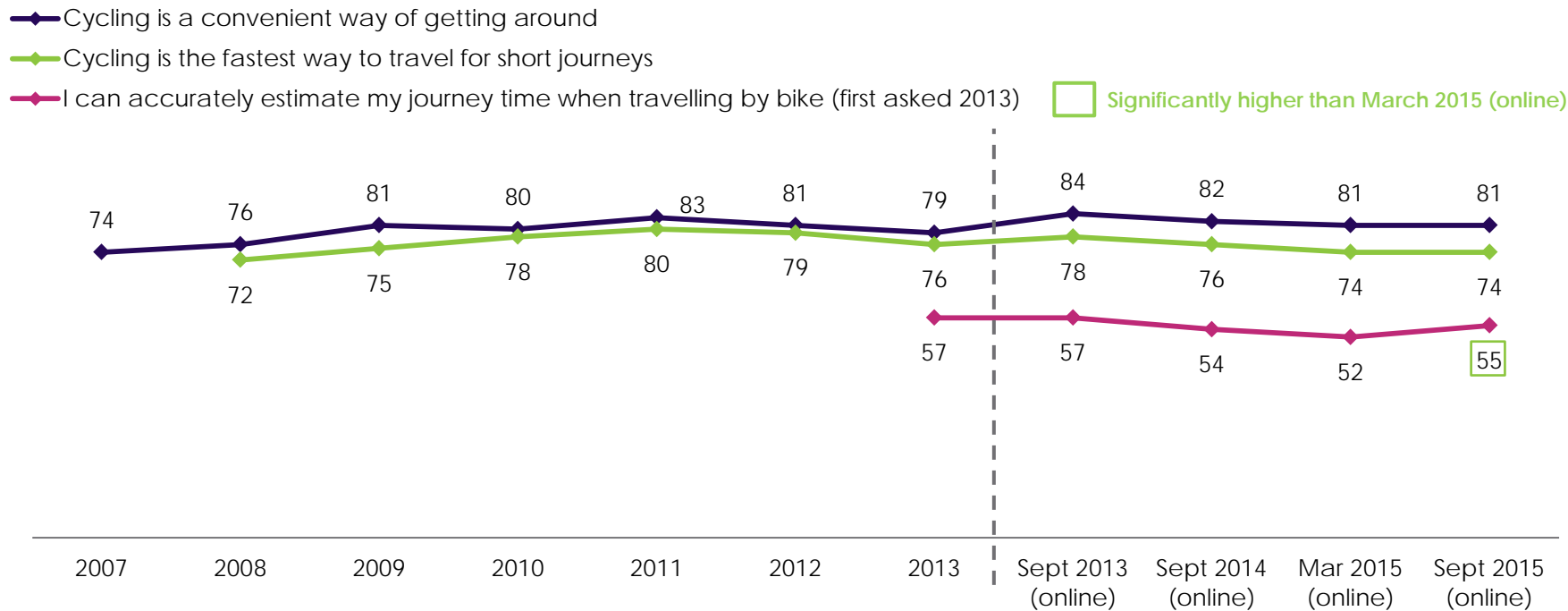
C2: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – Sept 2015 (online) (2159), Mar 2015 (online) (2241), Sept 2014 (online) (2192), Sept 2013 (online) (1333), 2013 (1373), 2012 (1326), 2007-2011 (c.1000)



# Cycling is still widely thought of as a convenient way of getting around and the fastest way to travel for short journeys

## Convenience factors – % agree



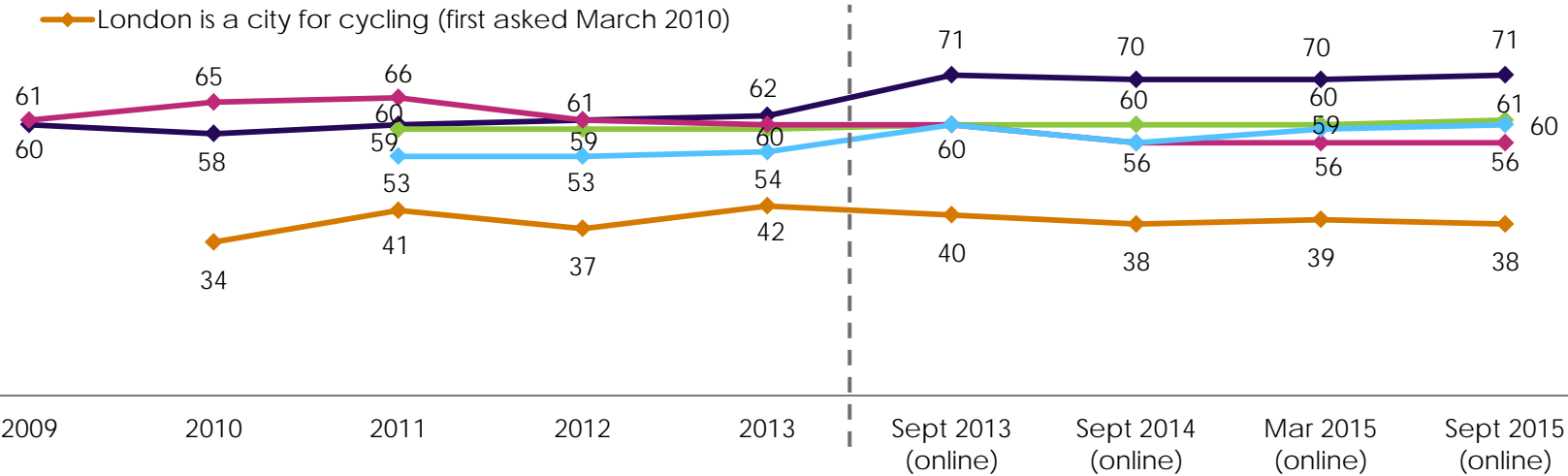
A1: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – Sept 2015 (online) (2159), Mar 2015 (online) (2241), Sept 2014 (online) (2192), Sept 2013 (online) (1333), 2013 (1373), 2012 (1326), 2007-2011 (c.1000)

# Six in ten still agree that information and signs make it easy to find your way around, that there are good facilities for cyclists in London and that their local area is good for cycling

## Facility factors – % agree

- ◆ 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 Jun10, first reported 2011)
- ◆ My local area is good for cycling
- ◆ There are good facilities for cyclists in London (first asked Jun10, first reported 2011)
- ◆ London is a city for cycling (first asked March 2010)

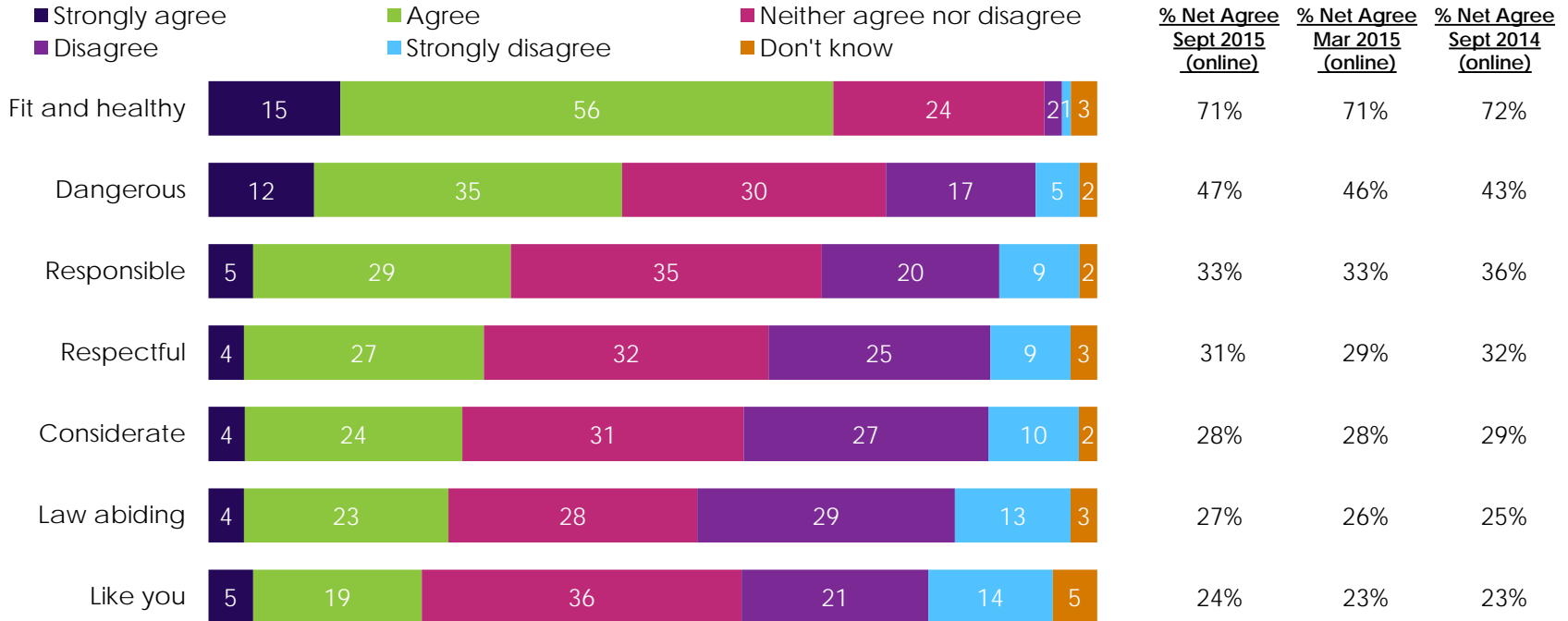


A1: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – Sept 2015 (online) (2159), Mar 2015 (online) (2241), Sept 2014 (online) (2192), Sept 2013 (online) (1333), 2013 (1373), 2012 (1326), 2007-2011 (c.1000)

Attitudes towards cyclists remain largely unchanged compared to last wave. They are seen as fit and healthy by the majority. However more see them as dangerous (47 per cent) than don't (22 per cent)

## Attitudes towards cyclists – %

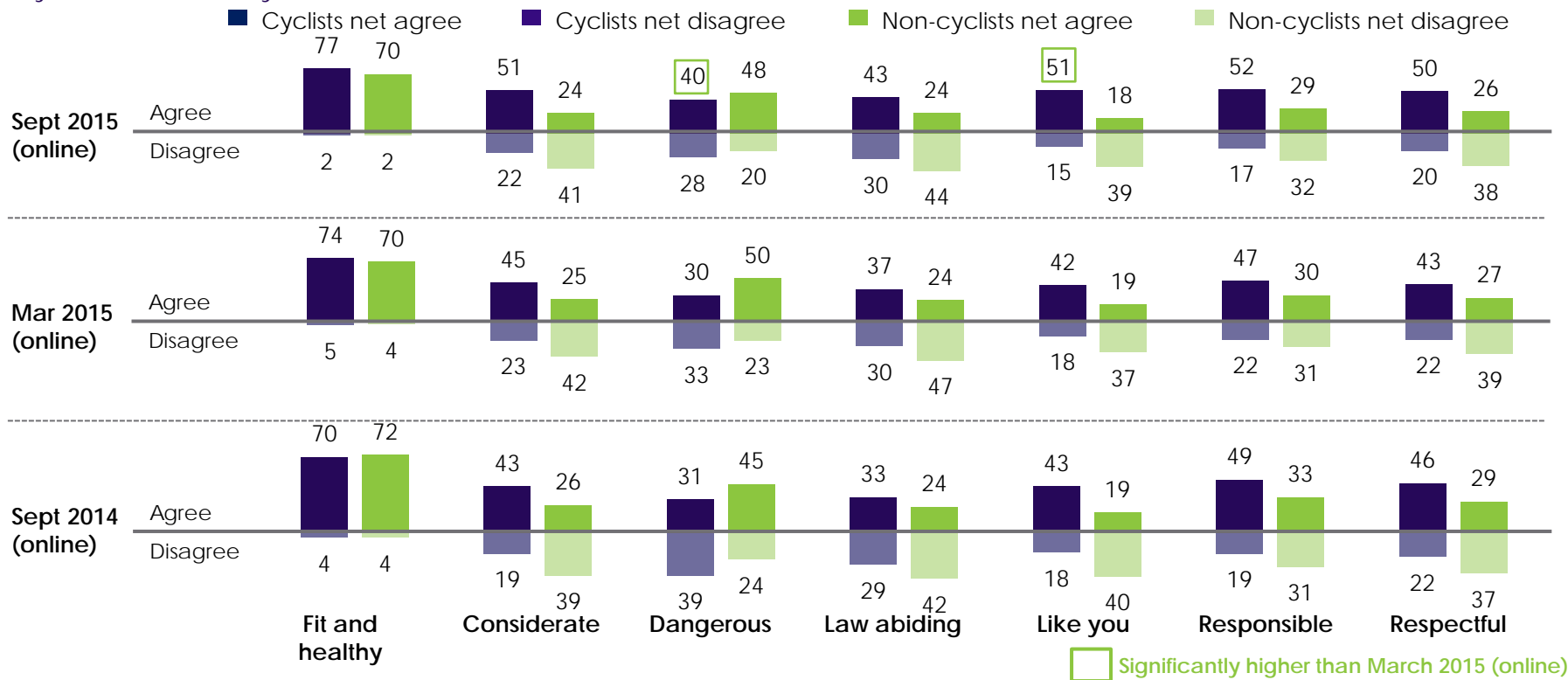


H1: Do you feel that cyclists in general are...?

Base: All – Sept 2015 (online) (1165), March 2015 (online) (1213), Sept 2014 (online) (1180)

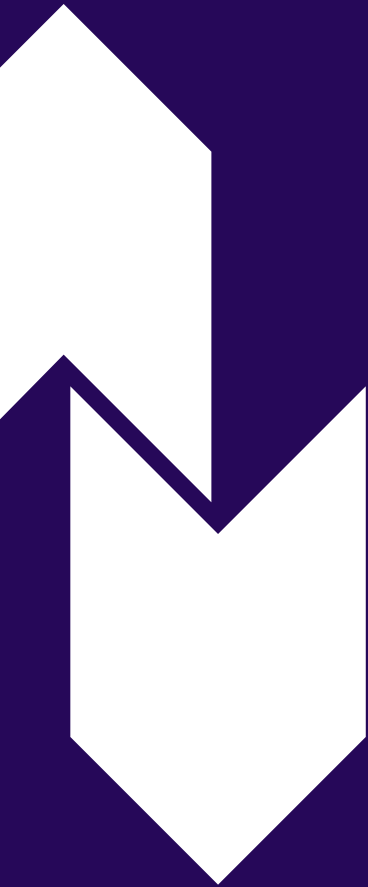
# Non-cyclists' perceptions of cyclists are naturally not as positive as cyclists' perceptions of themselves (apart from being fit and healthy where both groups agree). More cyclists consider themselves as considerate this wave

Cyclists and non-cyclists – %



  Significantly higher than March 2015 (online)

H1: Do you feel that cyclists in general are ...? Base Sept 2015 (online): all cyclists (267), all non-cyclists (898), Mar 2015 (online): all cyclists (284), all non-cyclists (929); Base Sept 2014 (online): all cyclists (271), all non-cyclists (909)



# Barriers



# Barriers – summary of key findings

## Infrastructure

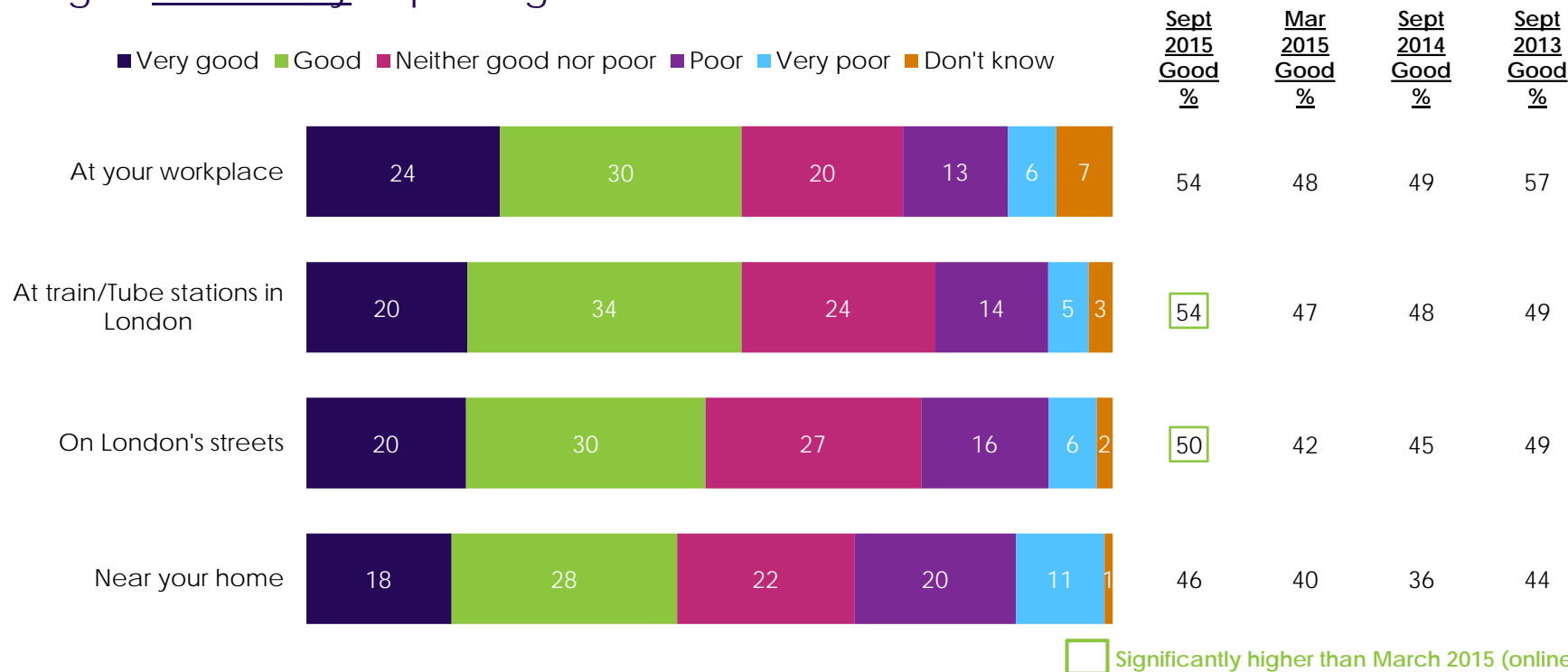
- Less than half of cyclists give 'good' ratings to the availability of cycle lanes, the availability of parking facilities for bikes near their home, the safety of cycling and bike security

## Safety

- Safety concerns remain a major barrier to increased cycling, as in previous waves
- Cyclists, both regular and occasional, feel significantly safer when cycling in traffic on quiet roads compared to when on busy roads
  - There have been significant rises in the proportions of all cyclists feeling safe on busy roads this wave. Now half of regular cyclists feel safe on busy roads
  - However only 23 per cent of occasional cyclists feel safe on these roads

# Cyclists remain happiest with the availability of parking facilities at their workplace and at train/ Tube stations but there is room for improvement as one in five still rate these aspects as poor

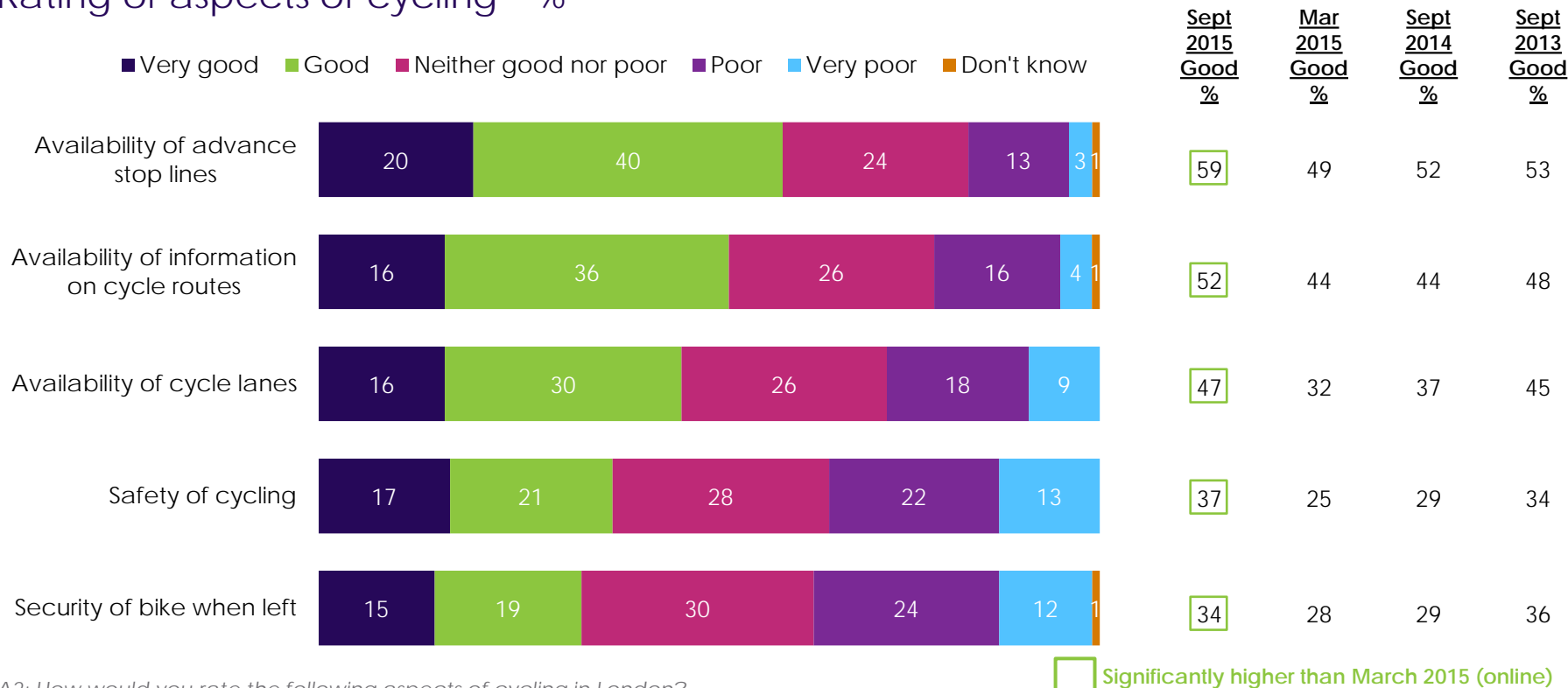
## Rating of availability of parking facilities – %



A2: How would you rate the following aspects of cycling in London? Base: All cyclists Sept 2015 (online) (505), Mar 2015 (online) (506), Sept 2014 (online) (531), Sept 2013 (online) (509)

# There have been significant improvements in satisfaction with advance stop lines, info on cycle routes, availability of cycle lanes, safety of cycling and bike security since March

## Rating of aspects of cycling – %



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

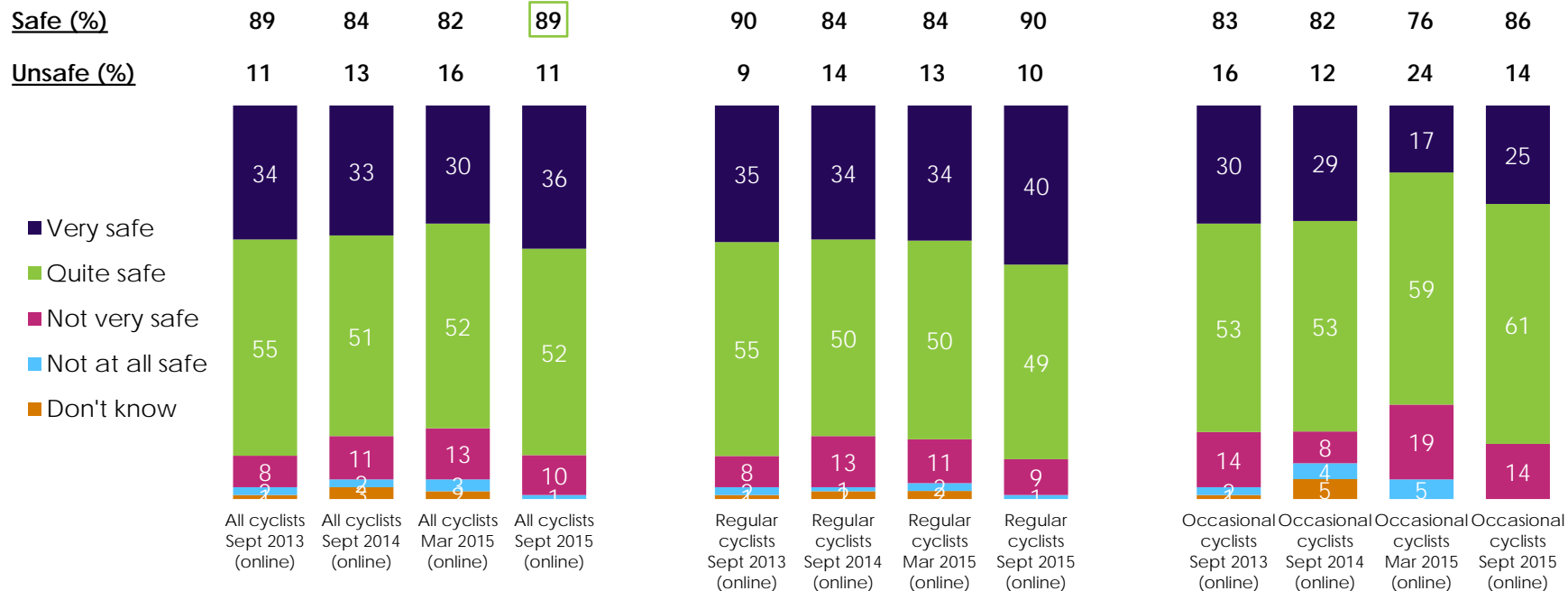
Base: All cyclists Sept 2015 (online) (505), Mar 2015 (online) (506), Sept 2014 (online) (531), Sept 2013 (online) (509)



# Nine in ten cyclists find quiet roads safe when cycling in traffic. There has been a significant improvement in the proportion of cyclists feeling safe in traffic on quiet roads this wave compared to last

## Feeling of safety cycling on quiet roads – %

89 Significantly higher than March 2015 (online)



K6: In respect of the traffic you encounter when cycling in London, how safe do you feel cycling in traffic on quiet roads?

Base: All cyclists Sept 2015 (online): 267, Mar 2015 (online): 284, Sept 2014 (online): 271, Sept 2013 (online): 509

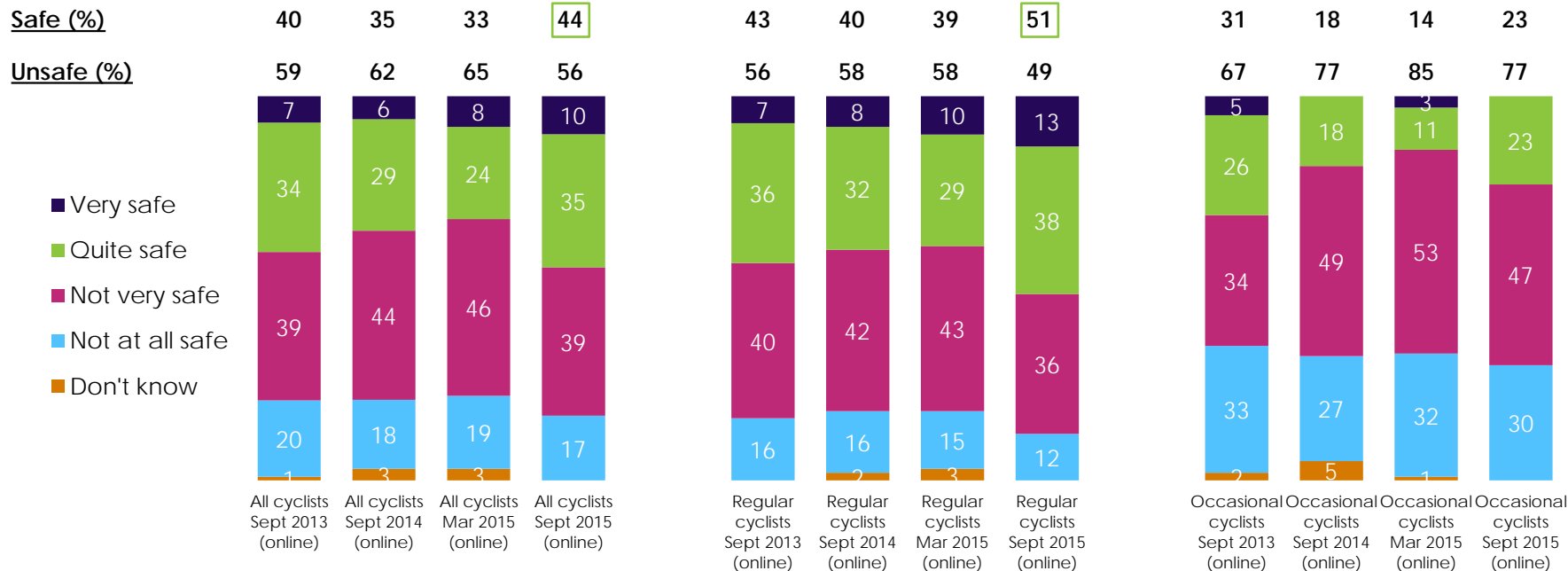
Regular cyclists Sept 2015 (online): 199, Mar 2015 (online): 209, Sept 2014 (online): 200, Sept 2013 (online): 387

Occasional cyclists Sept 2015 (online): 68, Mar 2015 (online): 75, Sept 2014 (online): 71, Sept 2013 (online): 122

Cyclists naturally don't feel as safe when cycling on busy roads. 56 per cent feel unsafe compared with 44 per cent who feel safe. Feelings of safety have improved significantly though among all cyclists and regular cyclists since last wave

Feeling of safety cycling on busy roads – %

Significantly higher than March 2015 (online)



K6: In respect of the traffic you encounter when cycling in London, how safe do you feel cycling in traffic on quiet roads?

Base: All cyclists Sept 2015 (online): 267, Mar 2015 (online): 284, Sept 2014 (online): 271, Sept 2013 (online): 509

Regular cyclists Sept 2015 (online): 199, Mar 2015 (online): 209, Sept 2014 (online): 200, Sept 2013 (online): 387

Occasional cyclists Sept 2015 (online): 68, Mar 2015 (online): 75, Sept 2014 (online): 71, Sept 2013 (online): 122



Cycle Hire



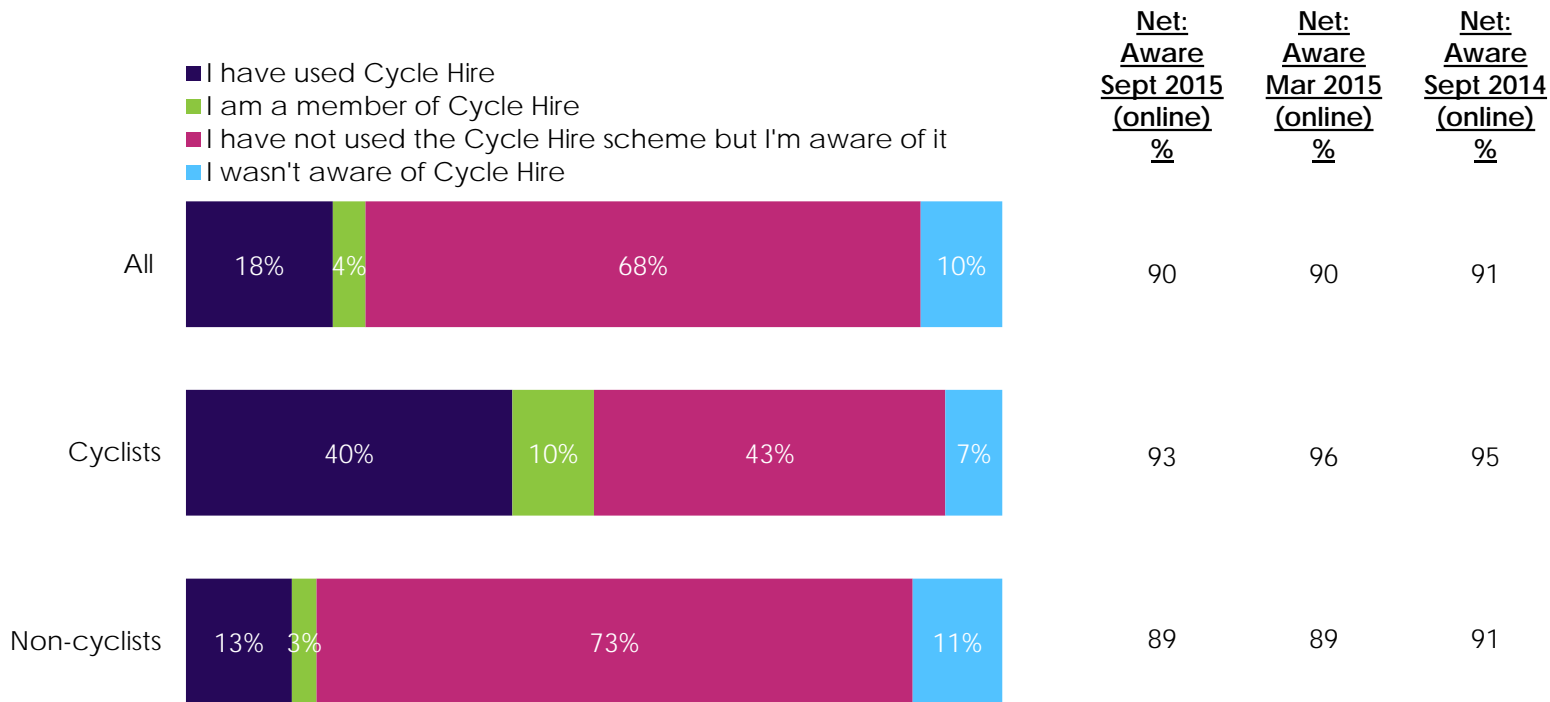
# Cycle Hire – summary of key findings

- Santander Cycle Hire (formerly Barclays Cycle Hire) was launched in July 2010 and provides access to hire bikes
  - There have been extensions of the scheme to areas of east and south west London in recent years
- Eighteen per cent of Londoners have used the Cycle Hire scheme and a further four per cent are members
  - 16-44 year olds, BAME Londoners and working Londoners are most likely to use the scheme
- The Cycle Hire scheme has a positive impact on over seven in ten users and intended users, encouraging them to cycle more
- 26 per cent of Londoners say they will definitely or probably use the scheme in the future



# Nine in ten Londoners are aware of Cycle Hire. 40 per cent of cyclists have used Cycle Hire and 10 per cent are members of the scheme

## Awareness of Cycle Hire – %

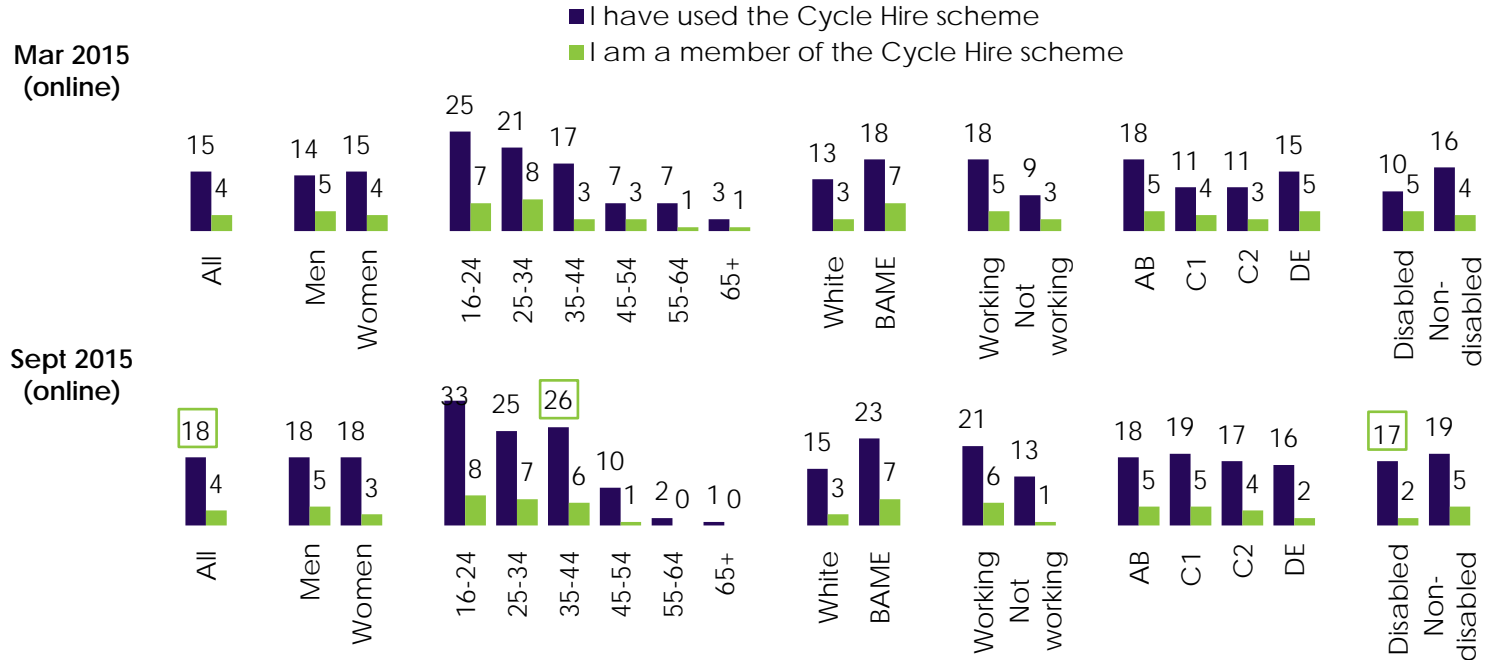


M10. For the following schemes, which of the following best applies to you? - Cycle Hire ('Boris bikes')

Base: All – Sept 2015 (online): (1164), Mar 2015 (online) (1,214), Sept 2014 (online) (1,180); Cyclists Sept 2015 (online): (282), Mar 2015 (online) (269), Sept 2014 (online) (294); Non-cyclists – Sept 2015 (online): (882), Mar 2015 (online) (945), Sept 2014 (online) (886)

# There has been a significant rise in usage of Santander Cycles (formerly Barclays Cycle Hire) from 15 per cent in March to 18 per cent now, driven mainly by those aged 16-44 and from social class groups C1C2

## Use of cycle Hire – %



□ Significantly higher than March 2015 (online)

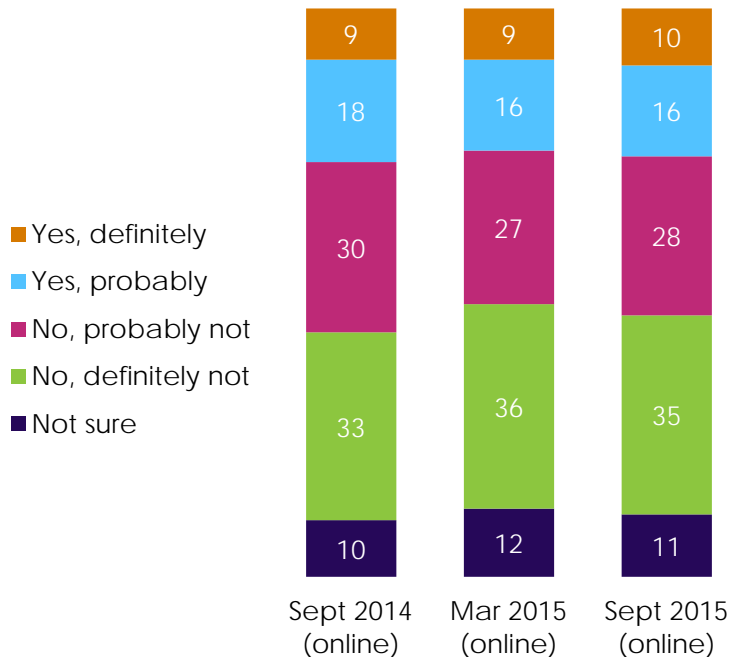
M10. For the following schemes, which of the following best applies to you? – Cycle Hire ('Boris bikes')

Base: All – Sept 2015 (online): (1164) Mar 2015 (online) (1214)

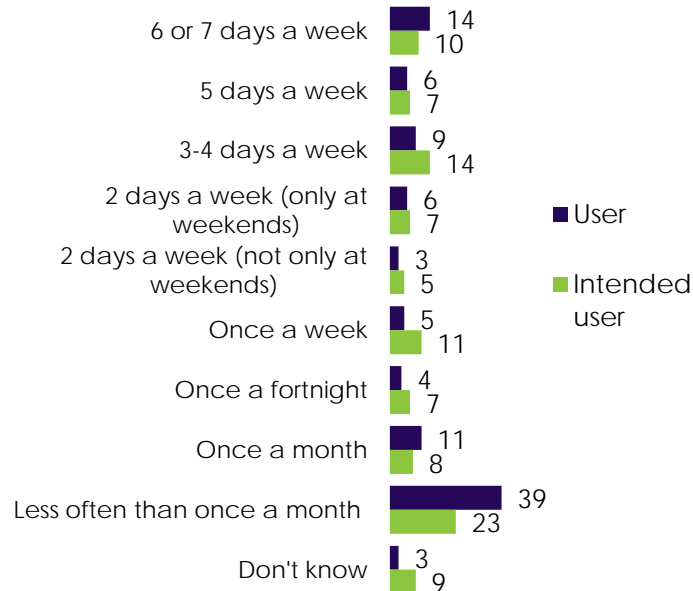
26 per cent of all Londoners say they will definitely or probably use Santander Cycles in the future. Over four in ten current users, use the scheme at least once a week

(Intended) frequency of use

Whether intend to use Cycle Hire in the future – %



Frequency of using/intending to use the Cycle Hire scheme: Sept 2015 (online) – %

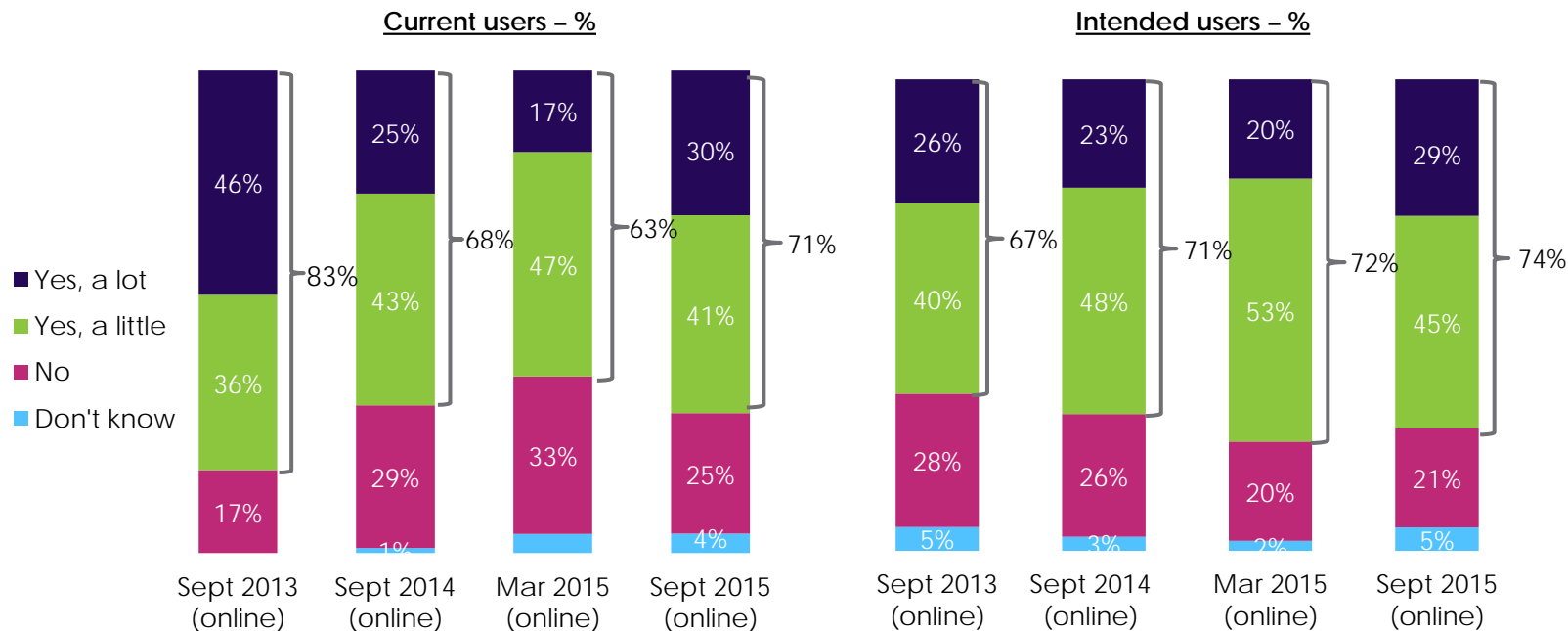


M11. In the next 12 months do you intend to use...? Base: All respondents – Sept 2015 (online) (1164), March 2015 (online) (1214), Sept 2014 (online) (1180)

M13a / M13. How often do you currently use / intend to use the Cycle Hire scheme? Base: Those who have used / intend to use Barclays Cycle Hire – Sept 2015 (online) (211/305)

# The Cycle Hire scheme encourages over seven in ten users and would be users to cycle more

## Impact of Cycle Hire on (intended) cycling



N5. To what extent would you say the Cycle Hire scheme has encouraged you to increase the amount that you 'intend to/' cycle?

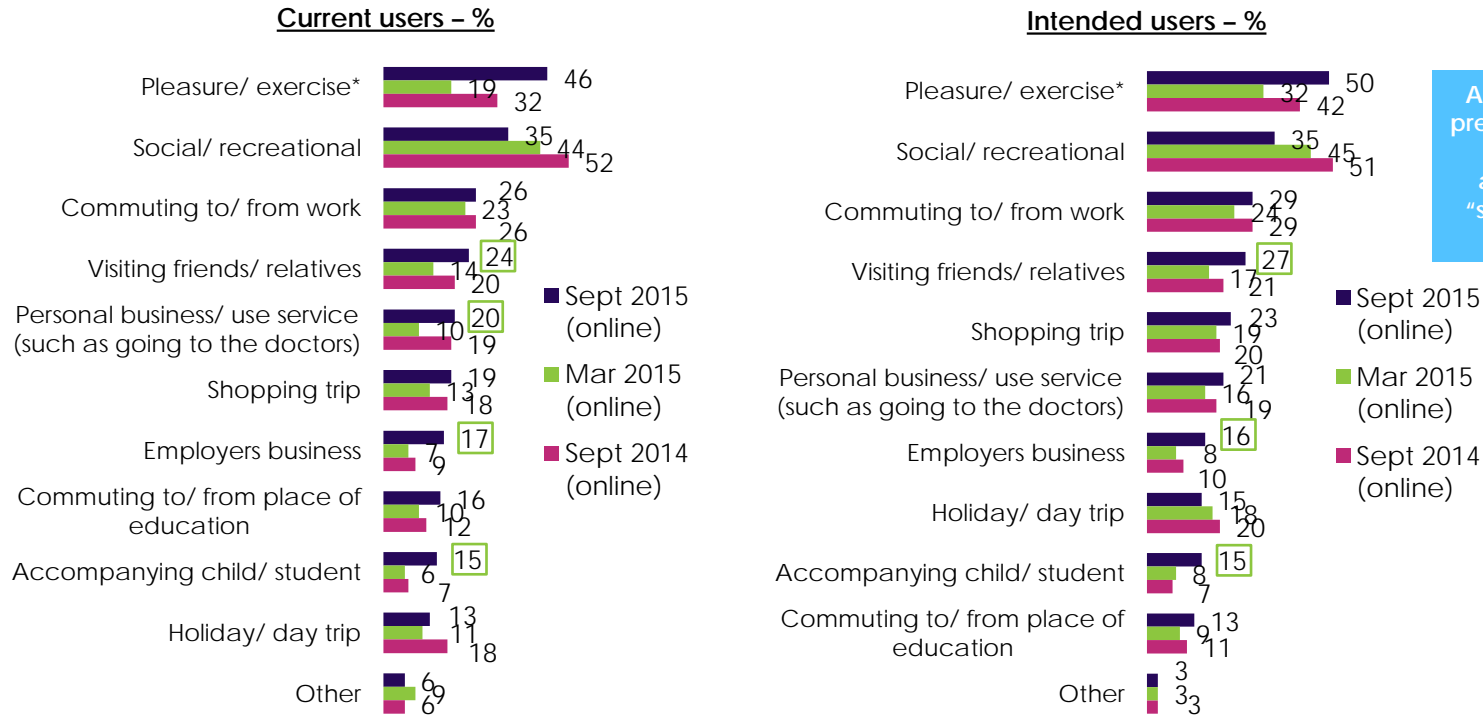
Base: All current users – Sept 2015 (online) (211), Mar 2015 (online) (181), Sept 2014 (online) (205), Sept 2013 (online) (138)

All intended users – Sept 2015 (online) (305), Mar 2015 (online) (309), Sept 2014 (online) (312), Sept 2013 (online) (294)



# There have been significant increases in a number of different types of trips made by Cycle Hire users and intended to be made by potential users

(Intended) trip use for Cycle Hire – %



Added "Pleasure" to first precode "exercise" in Sept 2015 – likely to have affected responses for "social/ recreational" as well

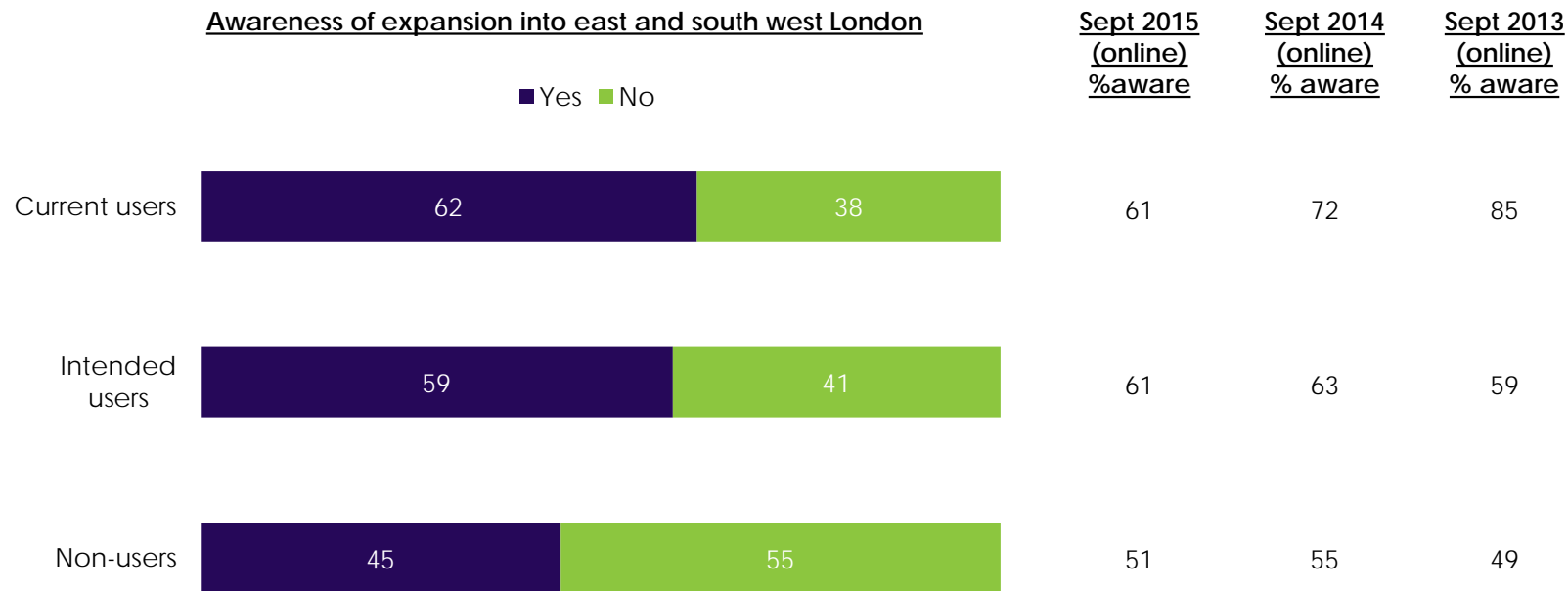
N6. What kinds of trips do you 'intend to/' use Cycle Hire for?

Base: All users (current user: Sept 2015 (211), March 2015 (181), September 2014(205); Intended users: Sept 2015 (305) March 2015 (309), September 2014 (312)

Significantly higher than March 2015 (online)

# Awareness of the eastern and south west expansion among current Cycle Hire users has fallen again this wave

Eastern and south west expansion area – %



N7. Were you aware that the area covered by Santander Cycle Hire has expanded from central London to include more of east London and south west London?

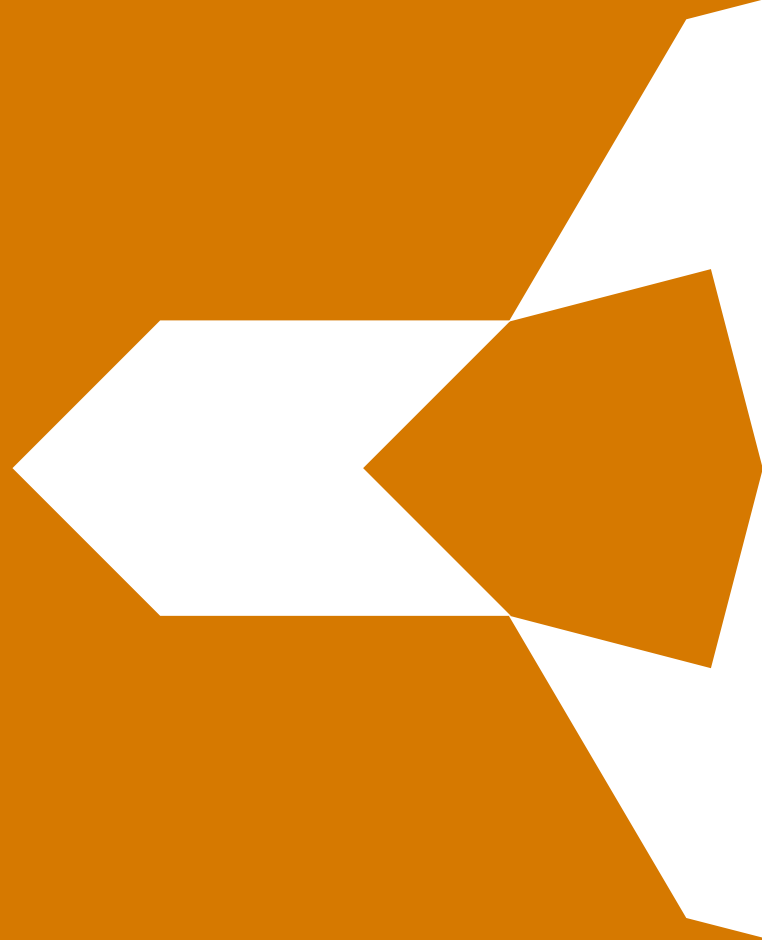
Base: Current users Sept 2015 (online) 211, Sept 2014 (online) 205, Sept 2013 (online) 157

Intended users Sept 2015 (online) 305, Sept 2014 (online) 309, Sept 2013 (online) 86

Non-users Sept 2015 (online) 103, Sept 2014 (online) 131, Sept 2013 (online) 165

Significantly lower than March 2015 (online)

# Cycle Superhighways





# Cycle Superhighways – summary of key findings

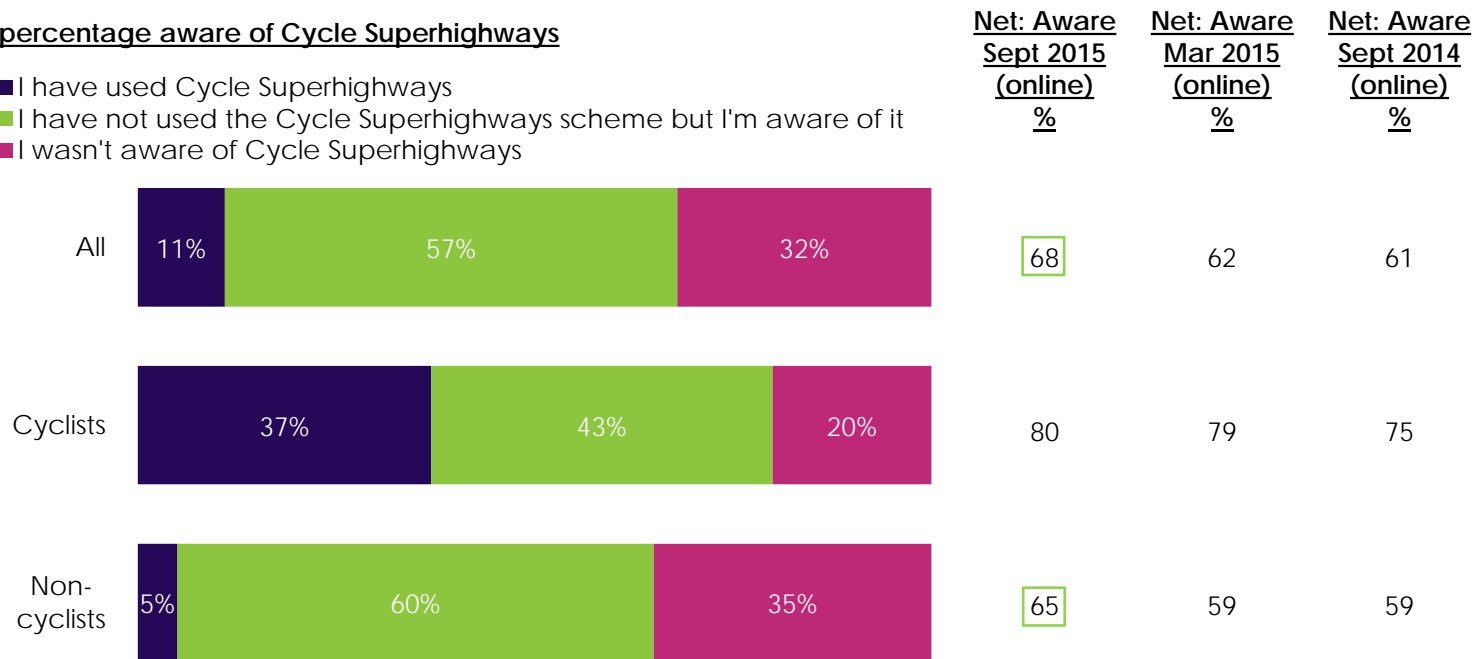
- Cycle Superhighways are a series of cycle routes running from outer to central London
  - The first two were opened in summer 2010, two more opened in summer 2011
  - Five more routes are planned for 2015 and 2016
- Eleven per cent of Londoners say they have used Cycle Superhighways before, rising to over a third of cyclists (37 per cent)
- One in five (21 per cent) intend to use Cycle Superhighways in the future (56 per cent of cyclists)
  - Usage of Cycle Superhighways among cyclists is significantly higher this September compared to March 2015
- The impact of Cycle Superhighways on Londoners' propensity to cycle is marginally higher this time compared to March
  - 70 per cent of current users say they have increased their cycling as a result of Cycle Superhighways
  - 69 per cent of intended users say Cycle Superhighways have increased the amount they intend to cycle

# Awareness of Cycle Superhighways has risen significantly to almost seven in ten this wave, driven by an increase in awareness among non-cyclists

## Awareness of Cycle Superhighways – %

### percentage aware of Cycle Superhighways

- I have used Cycle Superhighways
- I have not used the Cycle Superhighways scheme but I'm aware of it
- I wasn't aware of Cycle Superhighways



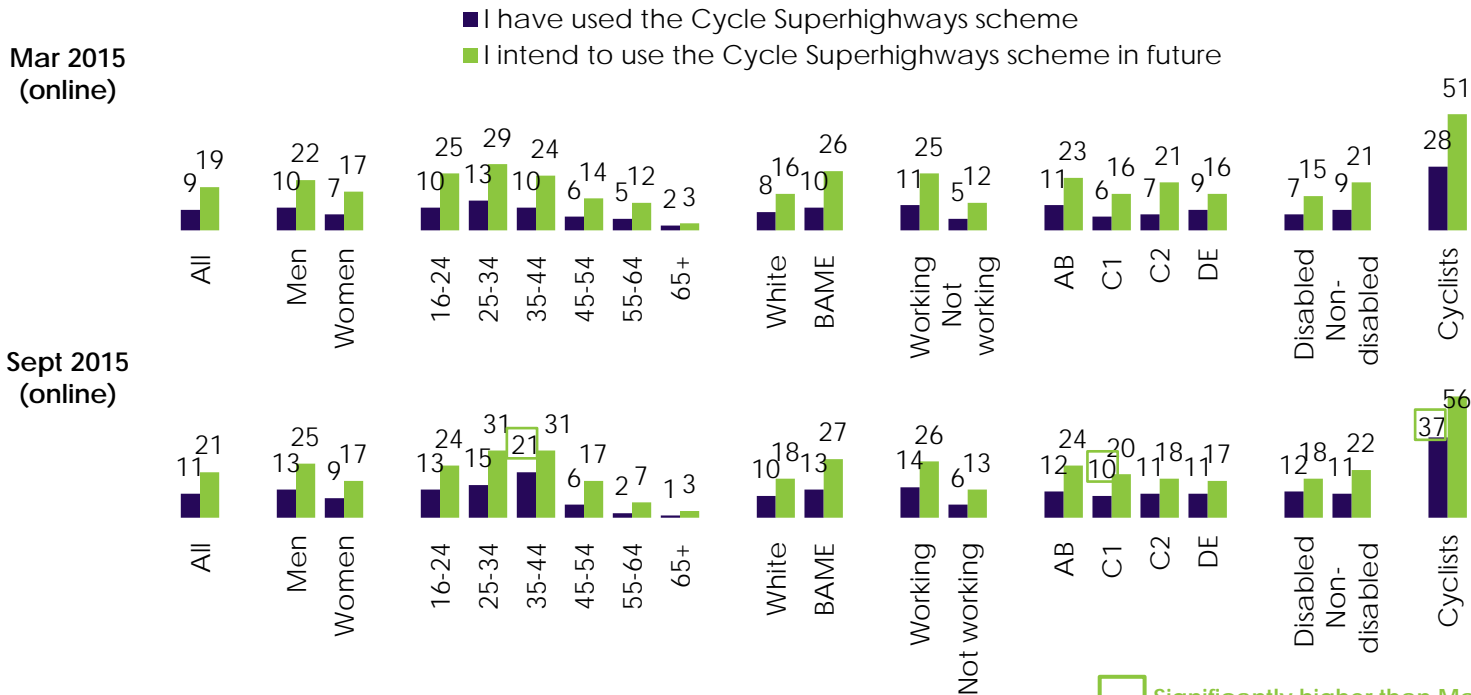
68 Significantly higher than March 2015 (online)

M10. For the following schemes, which of the following best applies to you? - Cycle Superhighways?

Base: All – Sept 2015 (online): (1164), Mar 2015 (online) (1214), Sept 2014 (online) (1180); Cyclists – Sept 2015 (online): (282) Mar 2015 (online) (269), Sept 2014 (online) (294); Non-cyclists – Sept 2015 (online): (882) Mar 2015 (online) (945), Sept 2014 (online) (886)

# Actual and intended use of Cycle Superhighways among all Londoners remains consistent this wave. 11 per cent have used them and 21 per cent intend to use them. Rises are significant among 35-44 year olds, those from social class C1 and cyclists

## Current and intended use of Cycle Superhighways – %



M10. For the following schemes, which of the following best applies to you? - Cycle Superhighways

M11. In the next 12 months do you intend to use...? - Cycle Superhighways?

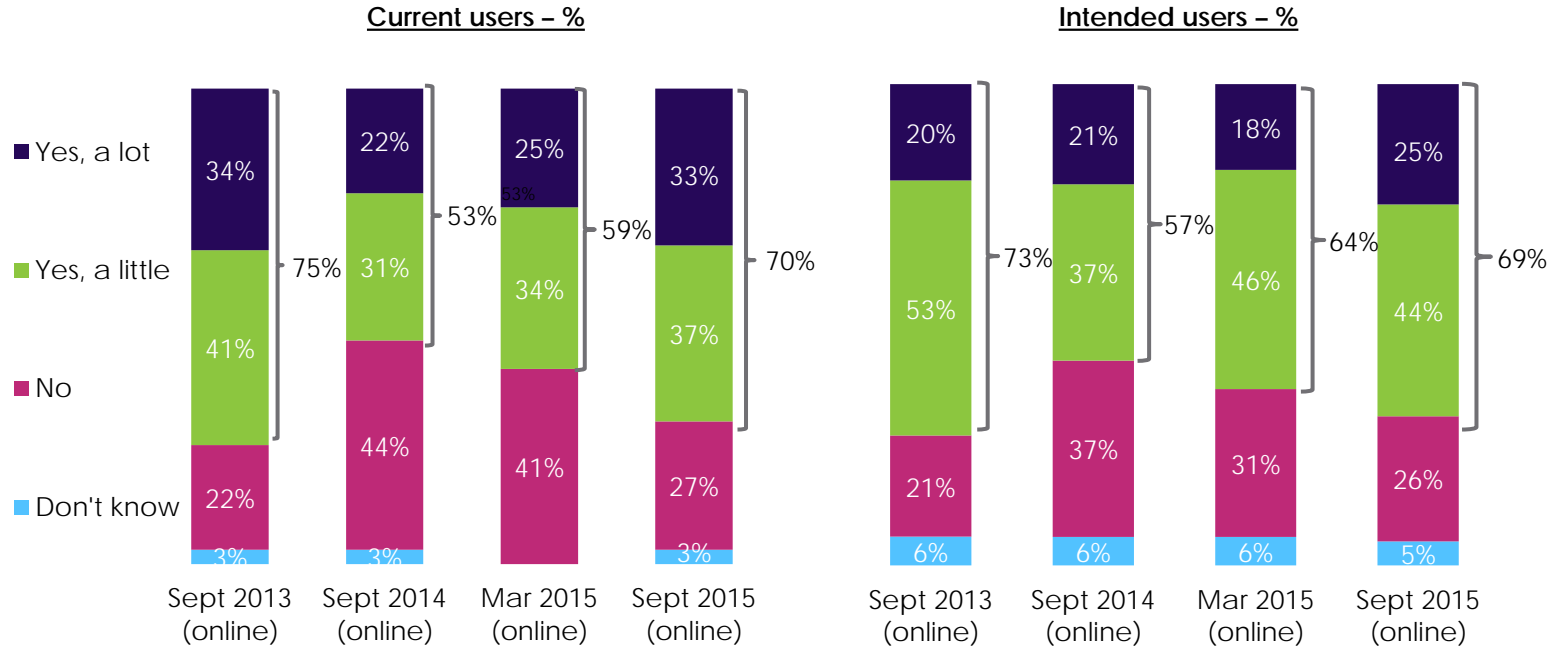
Base: All -Sept 2015 (online): (1164) Mar 2015 (online) (1214)

□ Significantly higher than March 2015 (online)



# The impact of Cycle Superhighways on users' (both current and intended) cycling levels is on the rise

## Impact of Cycle Superhighways on (intended) cycling



M12. Have the Cycle Superhighways caused you to increase the amount that you 'intend to/' cycle?

Base: All users – Sept 2015 (online) (144 current, 265 intended), Mar 2015 (online) (120 current, 257 intended), Sept 2014 (online) (140 current, 295 intended) Sept 2013 (online) (105 current, 74 intended)



Cycling events

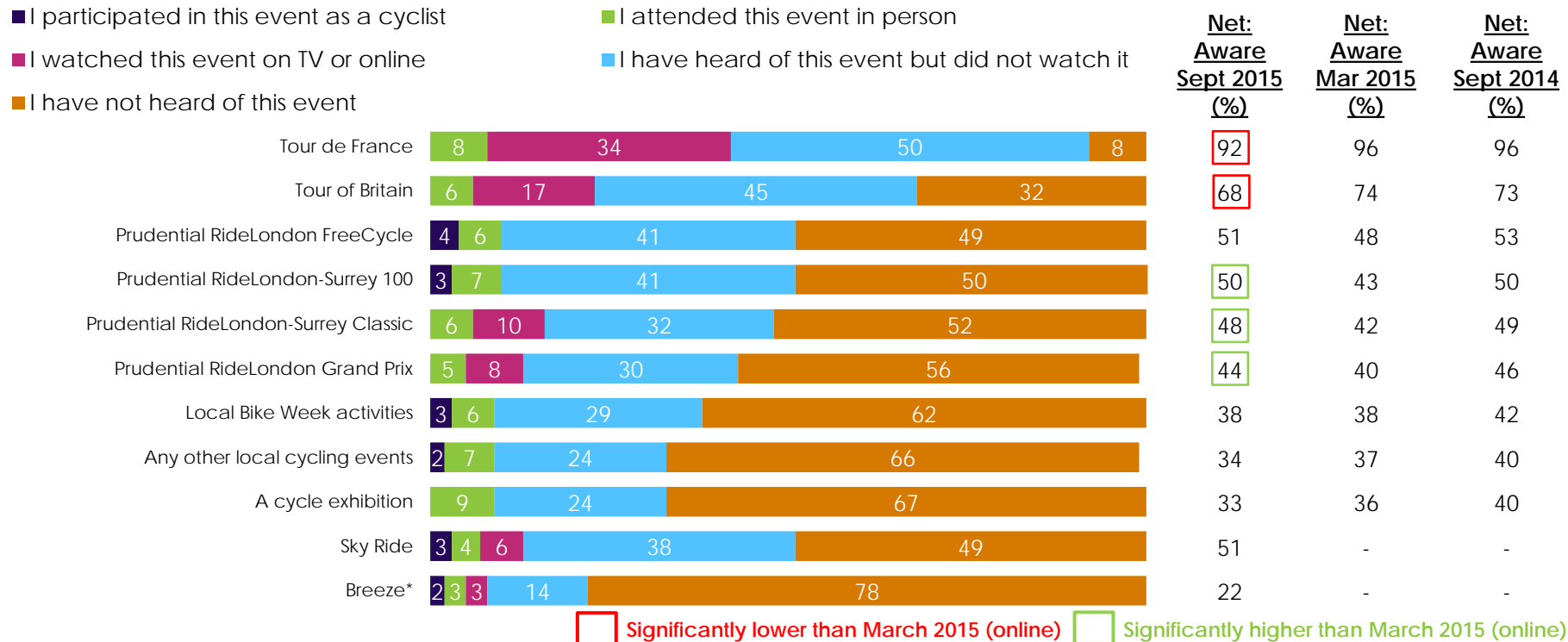


# Cycling events

- The Tour de France continues to be the most well-known cycling event among Londoners, with over nine in ten (92 per cent) aware of it, but down on March (96 per cent)
  - Awareness of the Tour of Britain stands at 68 per cent, also down on March (74 per cent)
- Awareness of the Prudential RideLondon events is significantly higher this wave than in March. Half are aware of the FreeCycle (51 per cent), the RideLondon-Surrey 100 (50 per cent) and the RideLondon-Surrey Classic (48 per cent) and over four in ten are aware of the RideLondon Grand Prix (44 per cent)
- Participation in the Prudential RideLondon FreeCycle and RideLondon-Surrey 100, the Local Bike Week events and other local cycling events has increased compared to March 2015 and September 2014
- Around one in five (21 per cent) of Londoners who watched or took part in Prudential RideLondon 2015 say that they now cycle more or have taken up cycling
- The impact of the Tour of Britain 2015 is slightly lower with 16 per cent encouraged to cycle more or take up cycling

Londoners' awareness of Prudential RideLondon events has increased significantly this wave. The Tour de France and Tour of Britain remain the most well-known cycling events

## Awareness of cycling events – %



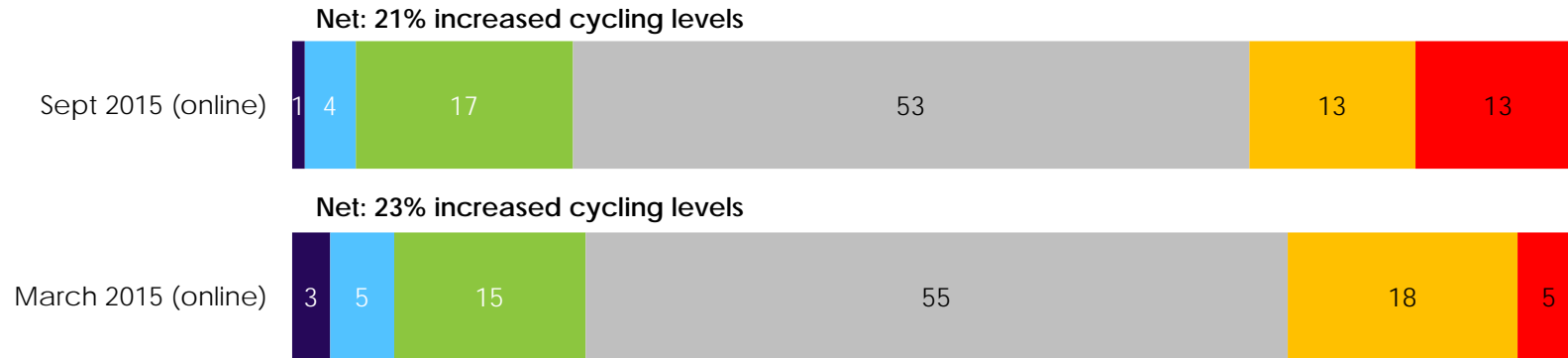
P4. For each of the following cycling events, please say which best applies to you in the last 12 months

Base: All Sept 2015 (online) (1164) Mar 2015 (online) (1214), Sept 2014 (online) (1180) \*NB women-only event

# 21 per cent of Londoners who watched or took part in Prudential RideLondon 2015 say they are now cycling more or have taken up cycling (similar to results last wave)

Impact of Prudential RideLondon on cycling levels – %

■ Taken up cycling ■ Cycled much more ■ Cycled slightly more ■ No difference ■ Cycled slightly less ■ Cycled much less



PRL1. Since watching / taking part in Prudential RideLondon in 2015, have you taken up cycling or cycled any more or less than before?

Base: All who watched or took part in PRL Sept 2015 (online) (246) Mar 2015 (online) (222)



# Sixteen per cent of Londoners who watched the Tour of Britain 2015 say they are now cycling more or have taken up cycling

Impact of Tour of Britain 2015 on cycling levels – %

■ Taken up cycling ■ Cycled much more ■ Cycled slightly more ■ No difference ■ Cycled slightly less ■ Cycled much less

**Net: 16% increased cycling levels**



TOB1. Since watching the Tour of Britain in 2015, have you taken up cycling or cycled any more or less than before?

Base: All who watched Tour of Britain in 2015: Sept 2015 (online) (275)



Cycle training



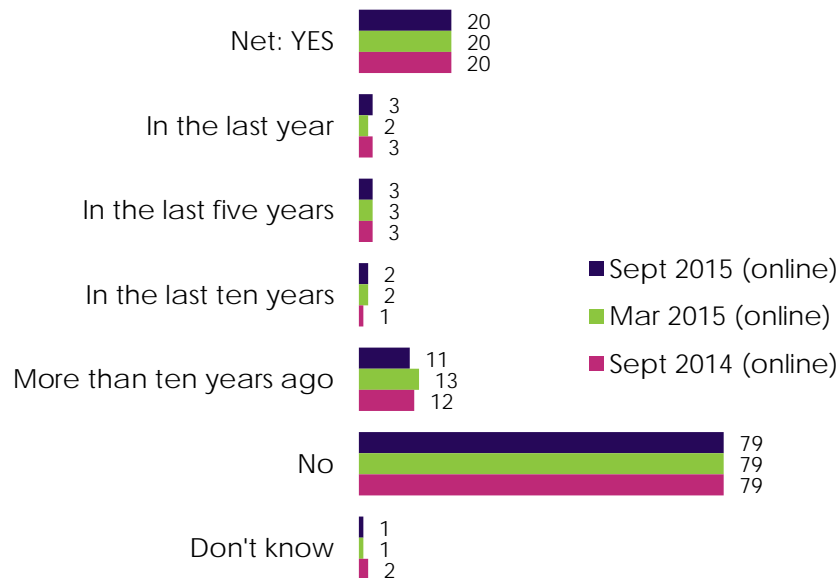
# Cycle training – summary of key findings

- One in five Londoners have taken some form of cycle training. Nine per cent say they have taken part in training in the last ten years
  - The old National Cycling Proficiency Test (51 per cent) is the most common type of training attended, followed by one-to-one training (28 per cent) and the school 'Bikeability' training (23 per cent)
  - There has been a rise in those attending one-to-one training sessions
- Training has a very direct impact on cycling confidence with 36 per cent saying they are much more confident and 43 per cent, a little more confident as a result of it
- Awareness of cycle training is significantly higher among women than men and rises with age
- 37 per cent of Londoners claim they would consider taking cycle training in the future, but this has been declining over the last two waves
  - The idea of cycle training continues to be most appealing to BAME Londoners and falls with age
- The main resistance to cycle training is a belief that they are sufficiently skilled anyway. Others say it is not for them or would never consider cycling in London

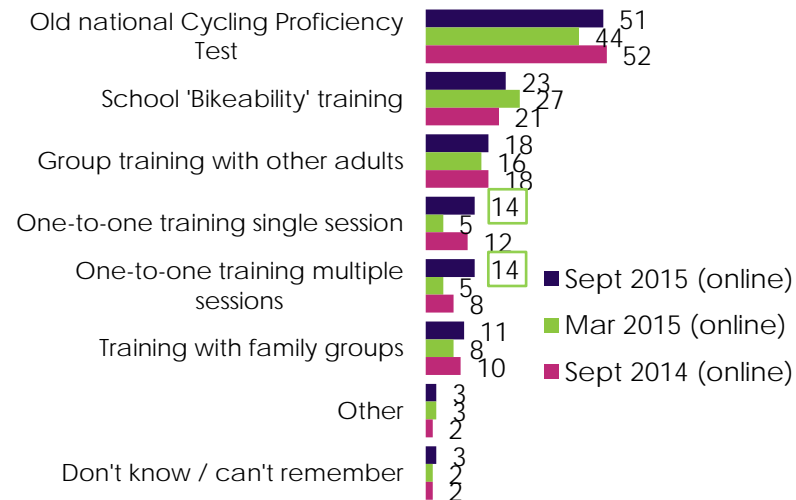
A fifth of Londoners have attended cycle training in the past. This was generally more than 10 years ago and was the old National Cycling Proficiency Test. One-to-one training sessions are becoming more popular

## Experience of cycle training

Cycle training attendance - %



Type of cycle training attended - %



   Significantly higher than March 2015 (online)

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

Q1: Have you ever attended any cycle training?

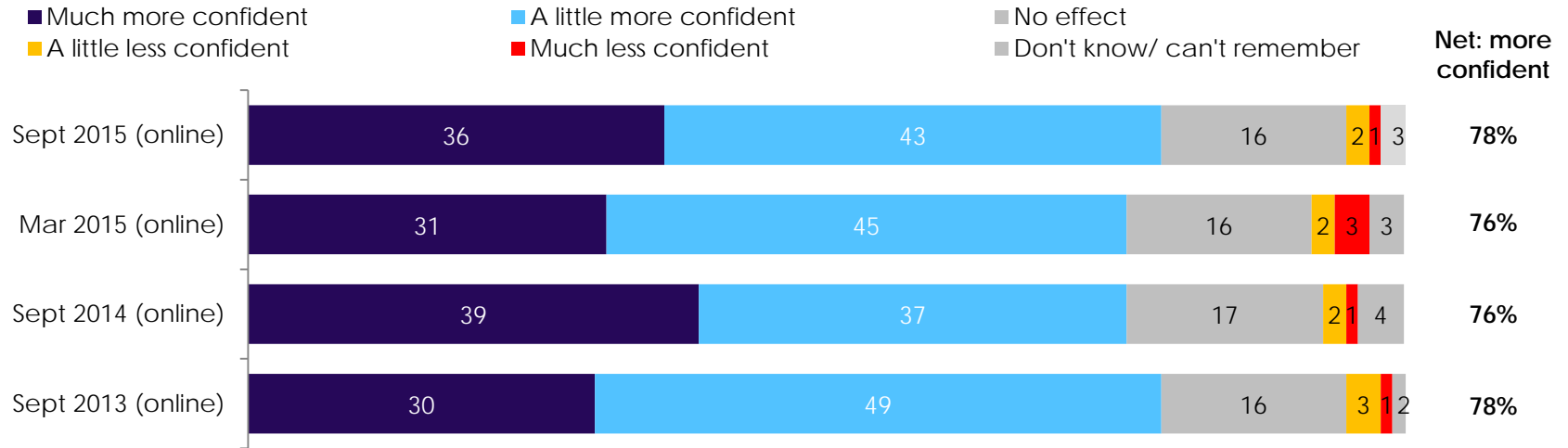
Base: all - Sept 2015 (online) (1164), Mar 2015 (online) (1214), Sept 2014 (online) (1180)

Q3: What sort of cycle training did you have?

Base: All those who have attended cycle training - Sept 2015 (online) (226), Mar 2015 (online) (262), Sept 2014 (online) (206)

# Almost eight in ten of those who attended cycle training claim that they are more confident as a result, in line with previous waves

## Impact of Cycle training – %



Q4. What effect did this cycle training have on your cycling confidence?

Base: All who have attended cycle training: Sept 2015 (online) (235), Mar 2015 (online) (263), Sept 2014 (online) (244), Sept 2013 (online) (312)

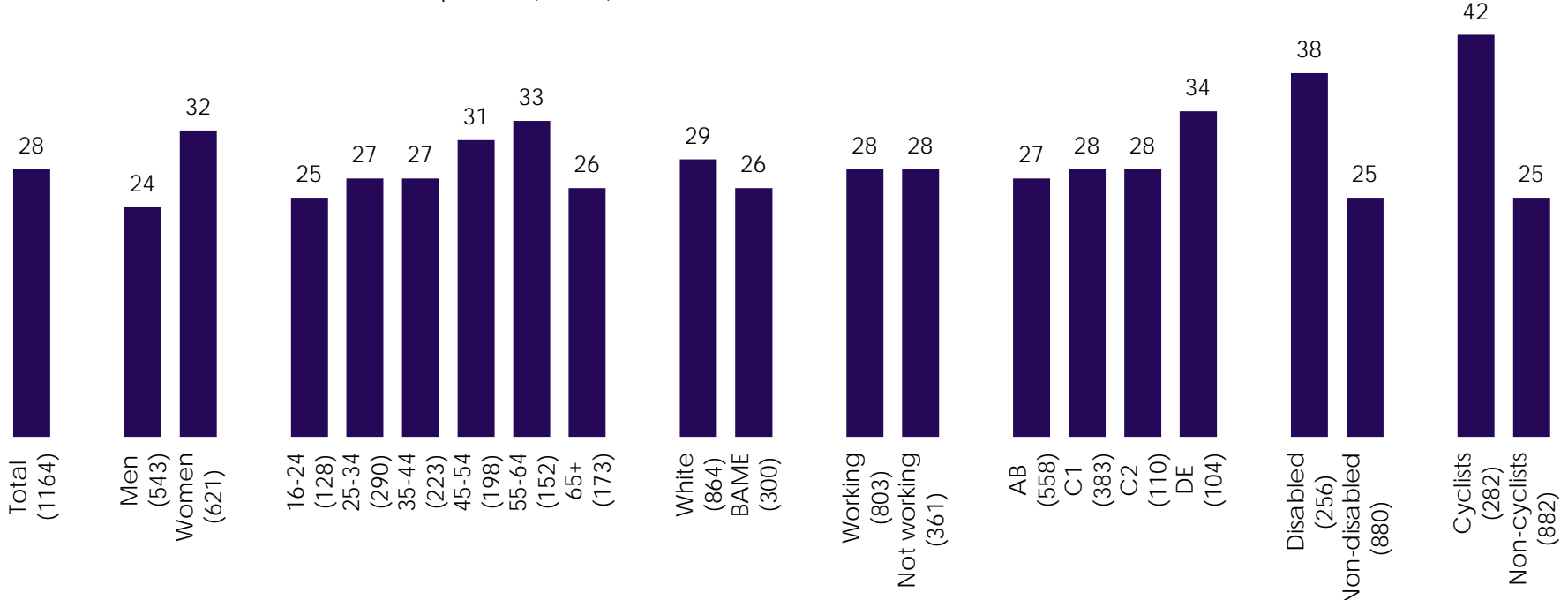




# Approaching three in ten Londoners are aware that free/ subsidised cycle training is offered by most local councils. Awareness is higher among cyclists and women and rises with age

Awareness that local councils offer free/ subsidised cycle training - %

■ Sept 2015 (online)



Q6. Are you aware that most local councils offer free / subsidized cycle training for adults and children with a qualified instructor?

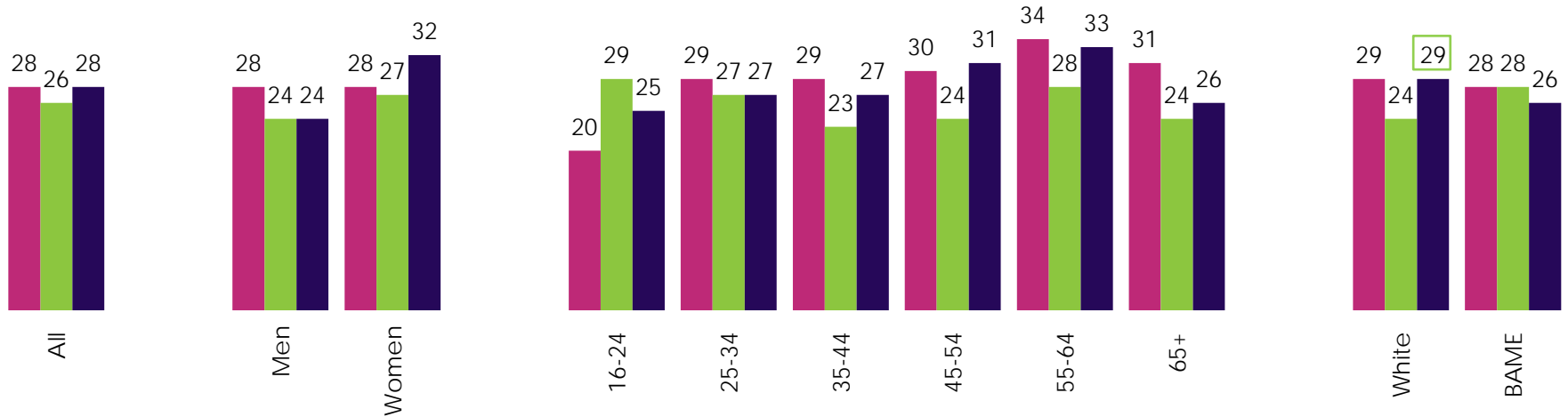
Base: all Sept 2015 (online): 1164



# Awareness of cycle training has not changed significantly since 2014

## Awareness that local councils offer cycle training for adults - %

■ Sept 2014 (online)    ■ Mar 2015 (online)    ■ Sept 2015 (online)



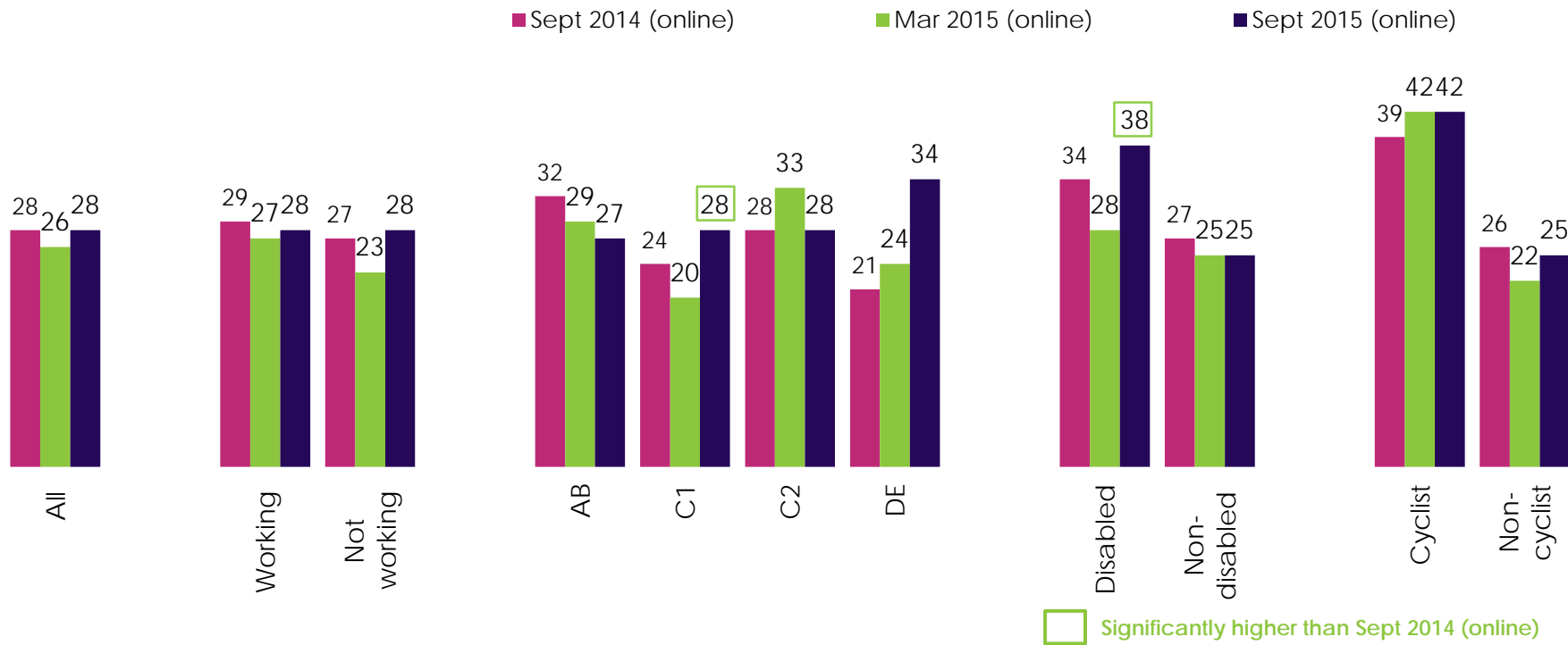
□ Significantly higher than Sept 2014 (online)

Q6. Are you aware that most local councils offer free / subsidised cycle training for adults and children with a qualified instructor?

Base: all Sept 2015 (online) (1164), Mar 2015 (online) (1214), Sept 2014 (online) (1180)

# Awareness of free/ subsidised cycle training has also risen significantly among those from social class C1 and disabled Londoners though

Awareness that local councils offer cycle training for adults - %



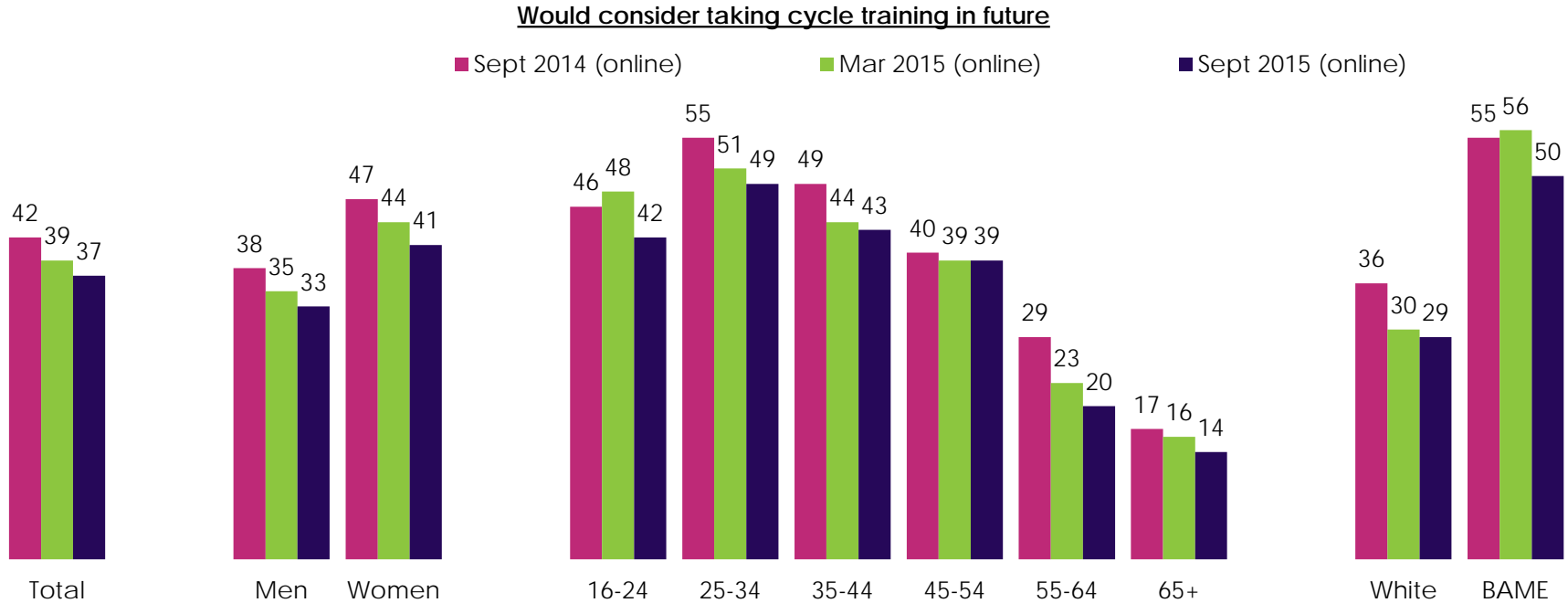
Q6. Are you aware that most local councils offer free / subsidised cycle training for adults and children with a qualified instructor?

Base: all Sept 2015 (online) (1164), Mar 2015 (online) (1214), Sept 2014 (online) (1180)

# 37 per cent of Londoners would consider cycle training in the future.

## Consideration of training has fallen for two consecutive waves

Propensity to take cycle training in the future – %



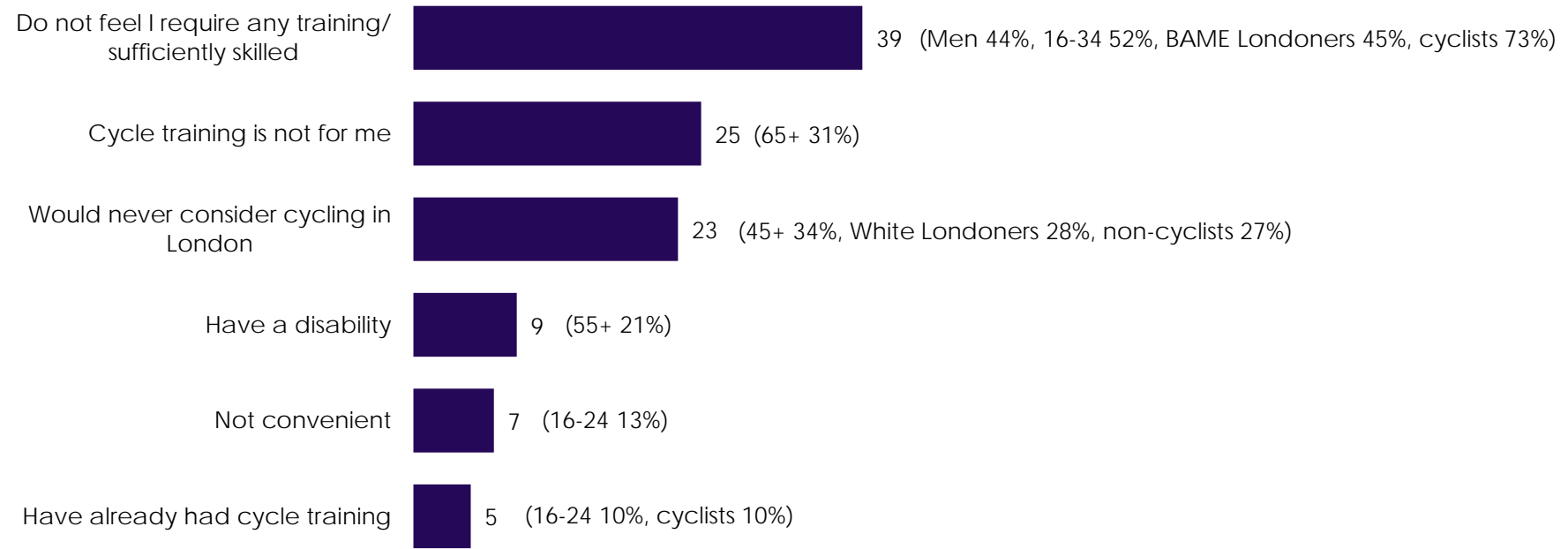
Q4b. Would you consider taking cycle training in the future?

Base: all Sept 2015 (online) (1164), Mar 2015 (online) (1214), Sept 2014 (online) (1180)



# The main reasons for not considering cycle training in the future are that they don't need it, don't think it's for them or would never consider cycling in London

## Resistances to taking cycle training in the future – %



Q4c. Why wouldn't you consider taking cycle training in the future? Base: all not considering taking cycle training in the future (743)





Investment in cycling

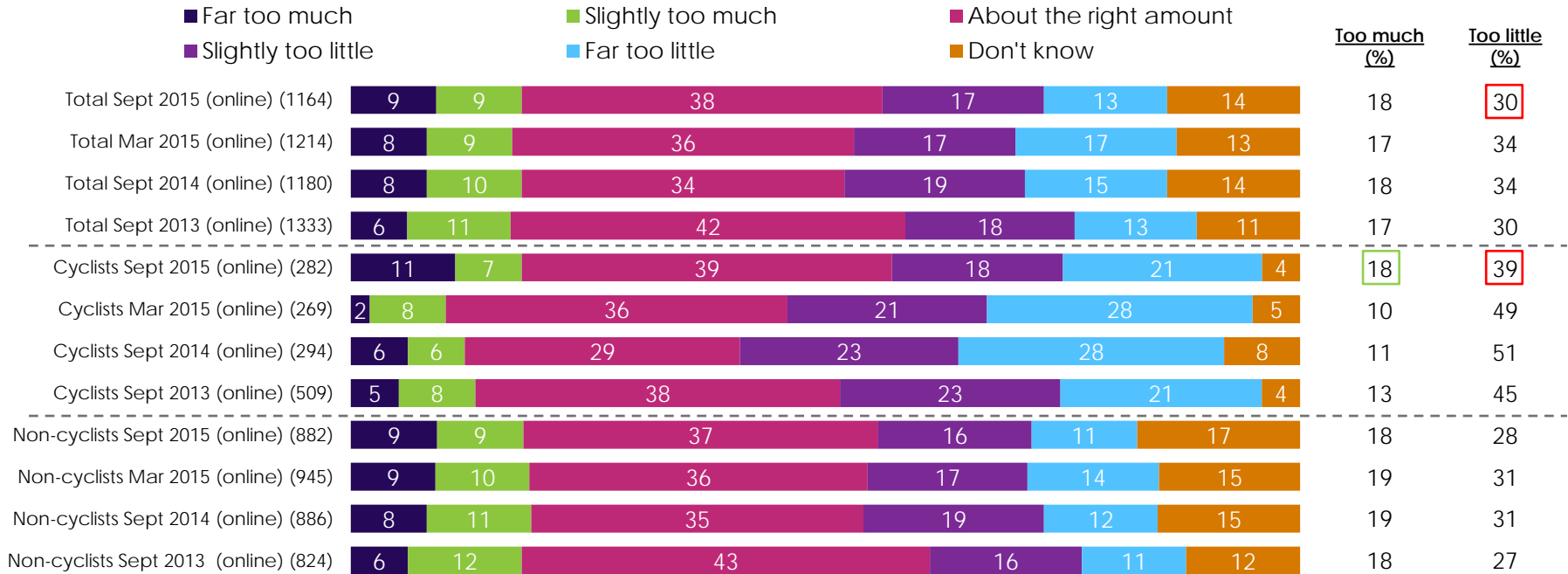


# Investment in cycling – summary of key findings

- Three in ten Londoners (30 per cent) feel there is too little investment in cycling and one in six (18 per cent), that there is too much
  - Predictably, cyclists continue to feel most strongly about this (39 per cent feeling there is too little investment)
- 74 per cent are aware that it is TfL's responsibility to improve conditions for cycling in London, including the management of the Cycle Hire scheme and Cycle Superhighways, providing guidance and maps and providing cycle training
- Two thirds of Londoners feel that improving the Capital's road network will be beneficial to all
- Around half of Londoners continue to believe that TfL cares about cyclists, is investing to improve people's journeys and is a trustworthy organisation

# Londoners continue to be more likely to feel there is too little investment in cycling in London (30 per cent) rather than too much (18 per cent)

## Investment levels in cycling – %



  Significantly lower than March 2015 (online)      Significantly higher than Mar 2015 (online)

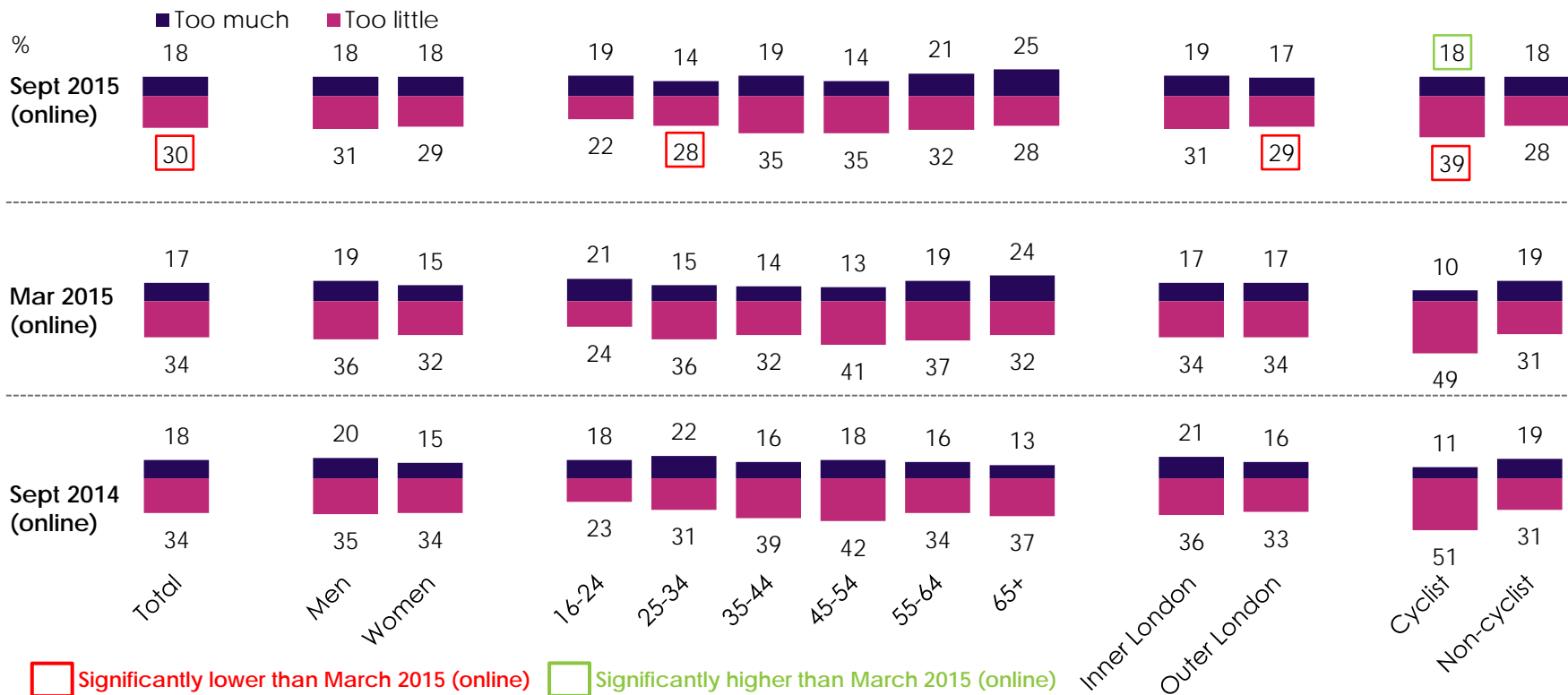
Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount?

Base: all (base sizes in brackets above)



# Fewer Londoners this wave think there is underinvestment in cycling, significantly so among 25-34 year olds and those living in outer London

## Perception of investment levels in cycling - %



Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount? Base: All Sept 2015 (online) (1164), Mar 2015 (online) (1214) Sept 2014 (online) (1180)

# Three quarters are aware that it is TfL's responsibility to improve cycling conditions in London. Awareness levels are fairly similar across demographic groups rising with age and lower among BAME Londoners

Awareness of TfL's responsibility to improve cycling conditions – %

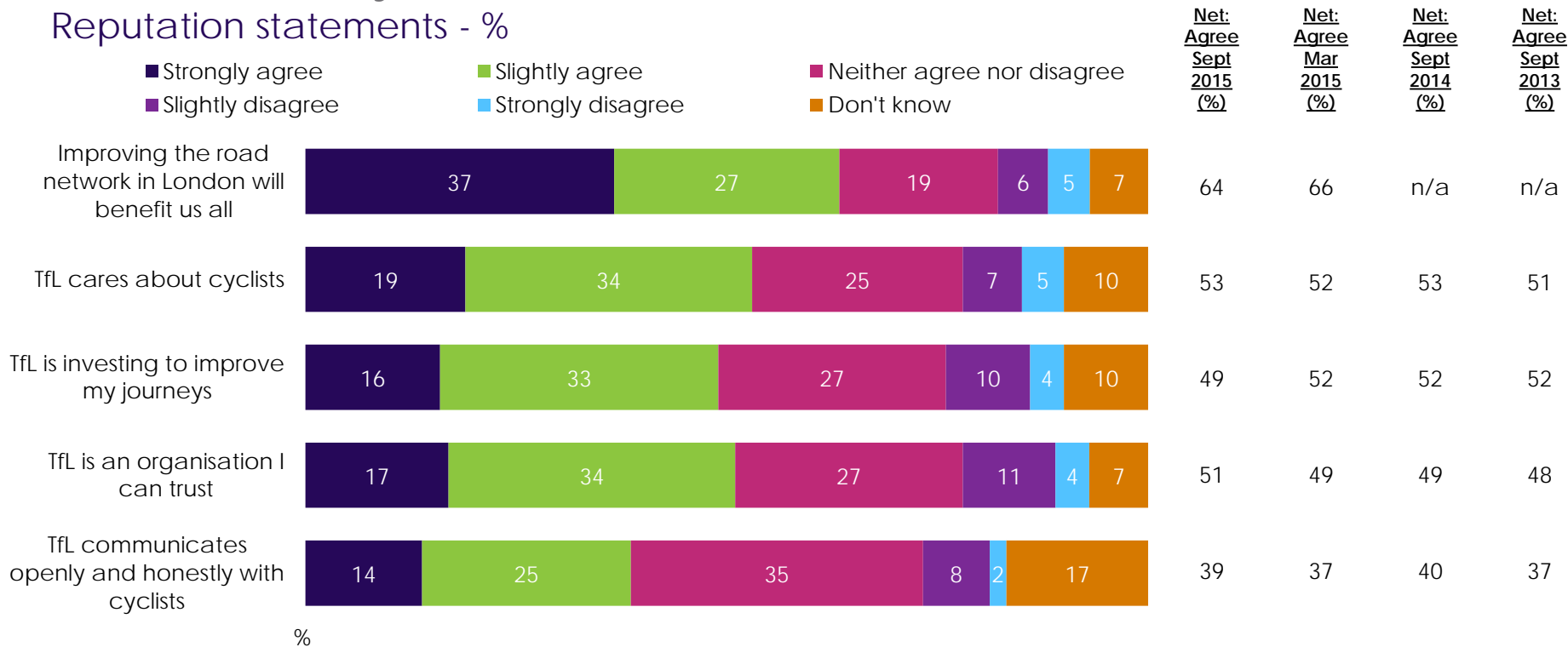
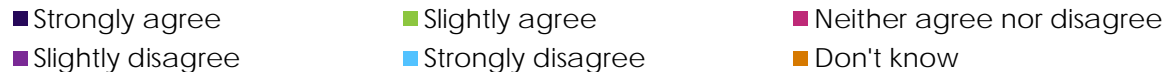
  Significantly higher than March 2015 (online)  
  Significantly lower than March 2015 (online)



Q6B: Transport for London is responsible for improving conditions for cycling, including management of the Cycle Hire scheme and Cycle Superhighways, providing guides and maps, providing cycle training and safety advice, providing cycle parking, and improving road conditions and safety for cyclists. Were you aware of this before today? Base: All respondents Sept 2015 (online) (1164), Mar 2015 (online) (1214), Sept 2014 (online) (1180)

# TfL has a more positive than negative reputation when it comes to providing for / caring about cyclists. Nearly two thirds of all Londoners agree that improving the road network for cyclists will benefit us all

## Reputation statements - %

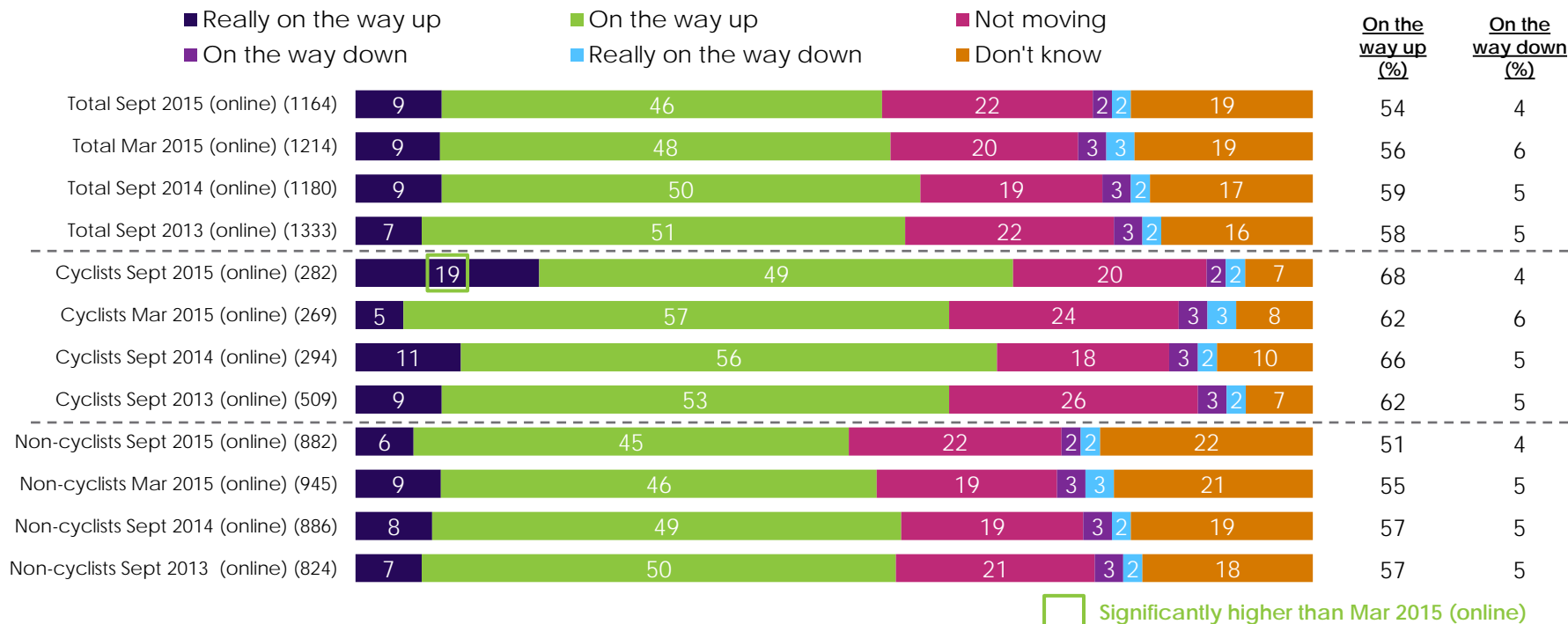


Q8. Still thinking about Transport for London (TfL) in relation to cycling, to what extent do you agree or disagree with the following statements?

Base: All Sept 2015 (online) (1164), Mar 2015 (1214), Sept 2014 (1180)

# Cyclists are much more likely to see TfL as being 'really on the way up' in relation to cycling compared to last wave

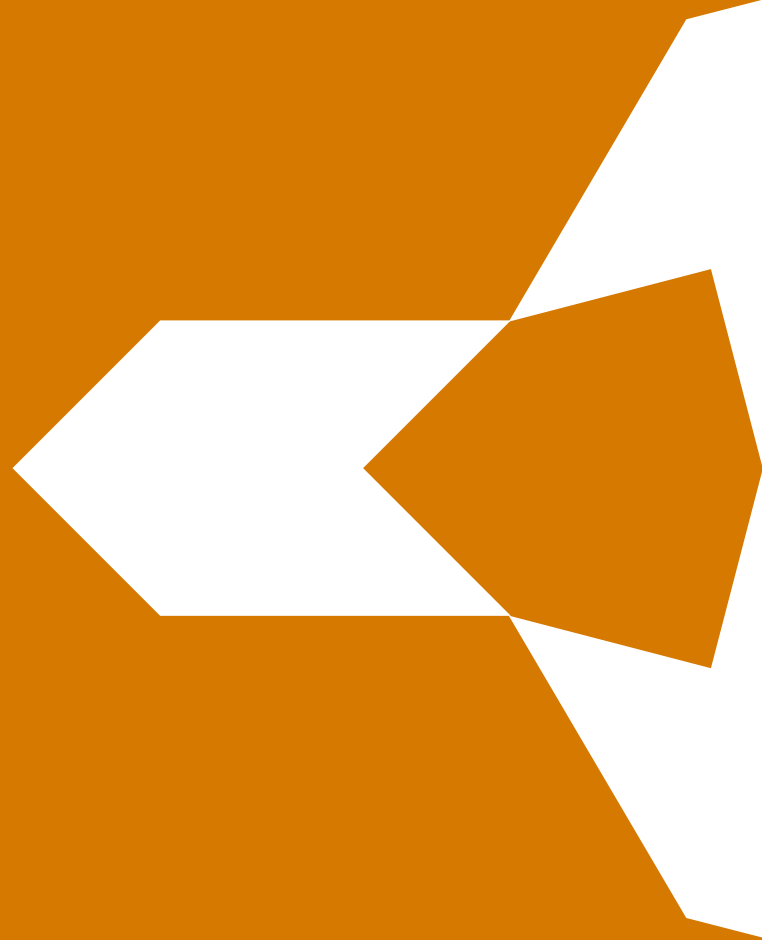
## Momentum – %



Q7. Thinking about Transport for London (TfL) in relation to cycling, which of these statements best describes TfL?

Base: all (base sizes in brackets above)

Cycle crime

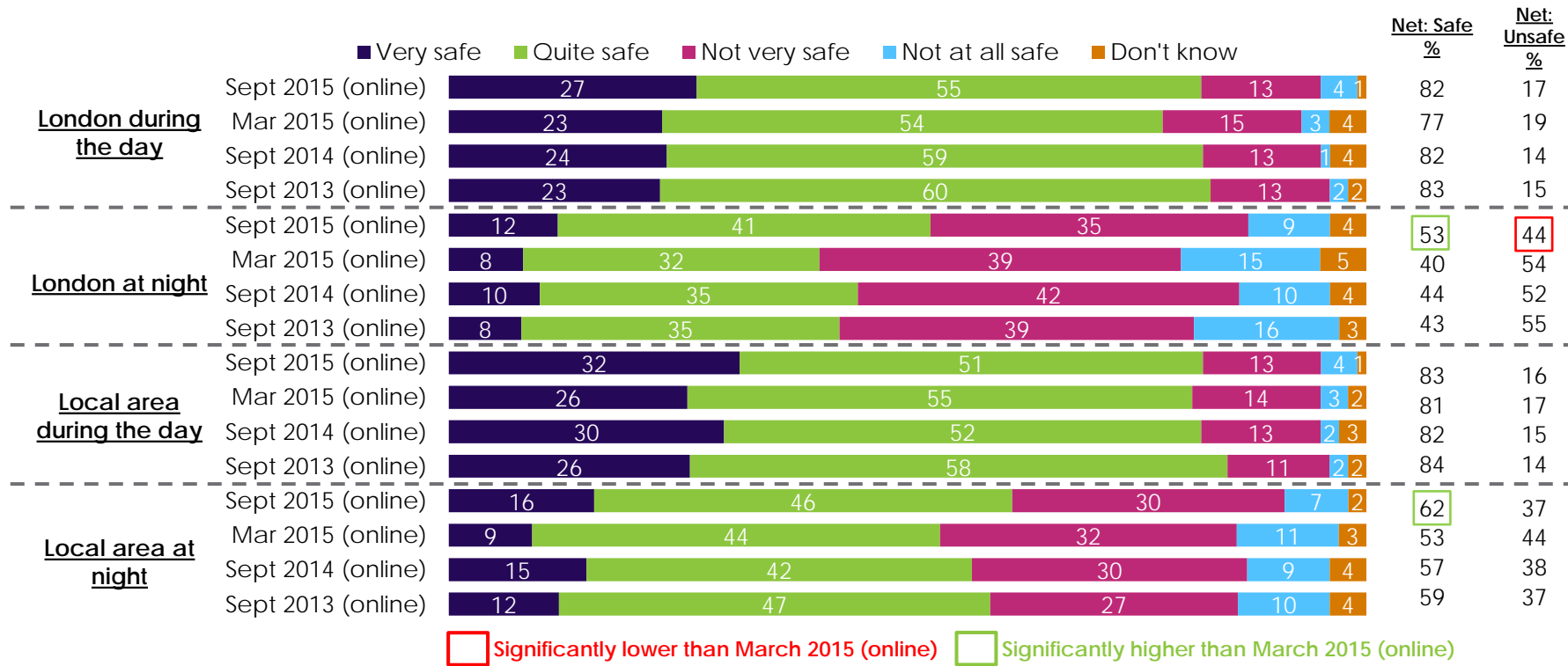


# Cycle crime – summary of key findings

- Cyclists feel safer (from crime and antisocial behaviour) when cycling during the day than at night and slightly safer when cycling in their local area than when cycling in London generally
- Feeling safe at night has improved significantly this wave (62 per cent now feel it is safe to cycle in their local area at night (up from 53 per cent last wave) and 53 per cent feel it is safe to cycle in London generally at night (up from 40 per cent)
- Over eight in ten Londoners report they have not been a victim of cycle theft in the last couple of years (similar to previous waves)
  - Where theft occurs, in 43 per cent of cases, this goes unreported, as most don't think the Police will be able to do anything about it
- However, six in ten Londoners believe there is a lot of bike theft in London and for four in ten, concerns about bike theft put them off cycling
- Bike theft is still having an impact on victims' cycling levels this wave, with 38 per cent stating they had stopped cycling altogether or temporarily as a result
- Over half of cyclists change their route after dark, with regular cyclists more likely to do so (58 per cent). They do this for better lighting and for a safer route
- Only four in ten (41 per cent) have their bike marked/registered with the police and less than three in ten (27 per cent) have it insured against theft

# Cyclists feel safer (from crime and antisocial behaviour) when cycling during the day than at night and slightly safer when cycling in their local area than when cycling in London generally. Feelings of safety at night have improved this wave

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



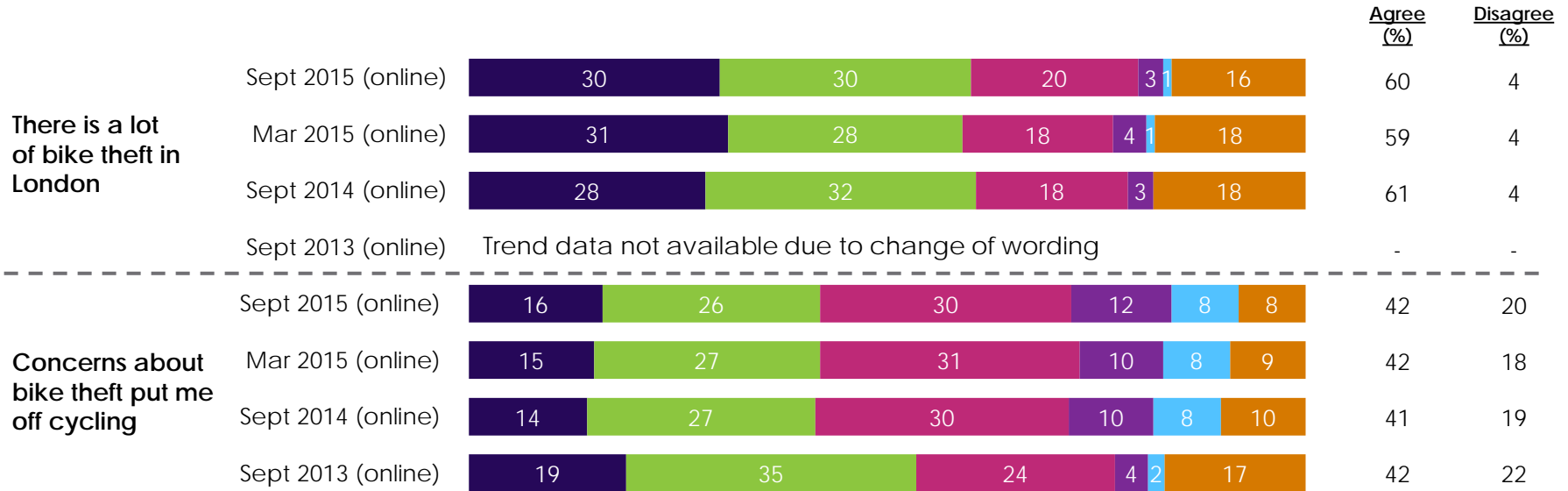
K1 – K4. Thinking about cycling in {London/local area} {during the day/at night}, how safe from crime or antisocial behaviour do you feel?

Base: All cyclists – Sept 2015 (online) (267), Mar 2015 (online) (284), Sept 2014 (online) (271), Sept 2013 (online) (509)

# Six in ten Londoners agree that there is a lot of bike theft in London and over four in ten are put off cycling because of it

Attitudes towards cycle crime in London – %

■ Strongly agree 
 ■ Agree 
 ■ Neither agree nor disagree 
 ■ Disagree 
 ■ Strongly disagree 
 ■ Don't know



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

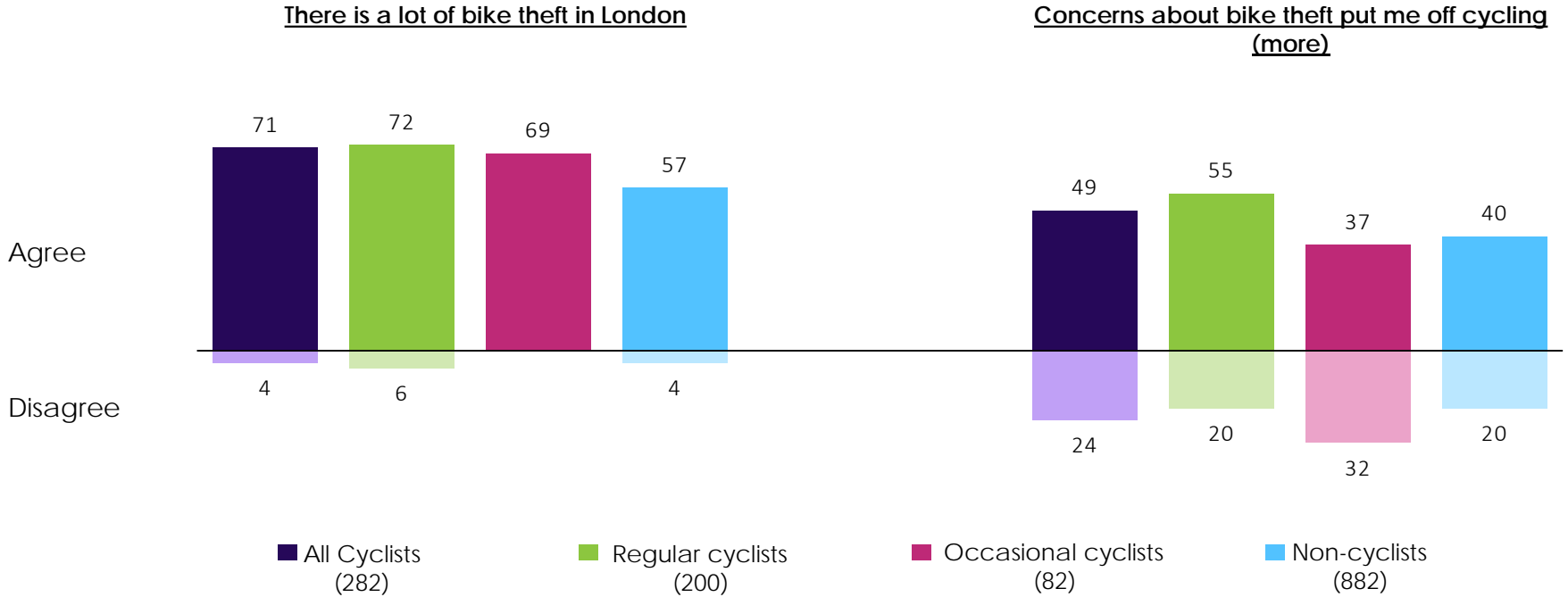
Base: all – Sept 2015 (online) (1164), Mar 2015 (online) (1214), Sept 2014 (online) (1180), Sept 2013 (online) (1333)





# Regular cyclists are most deterred from cycling more by bike theft (55 per cent)

Attitudes towards cycle crime in London – %



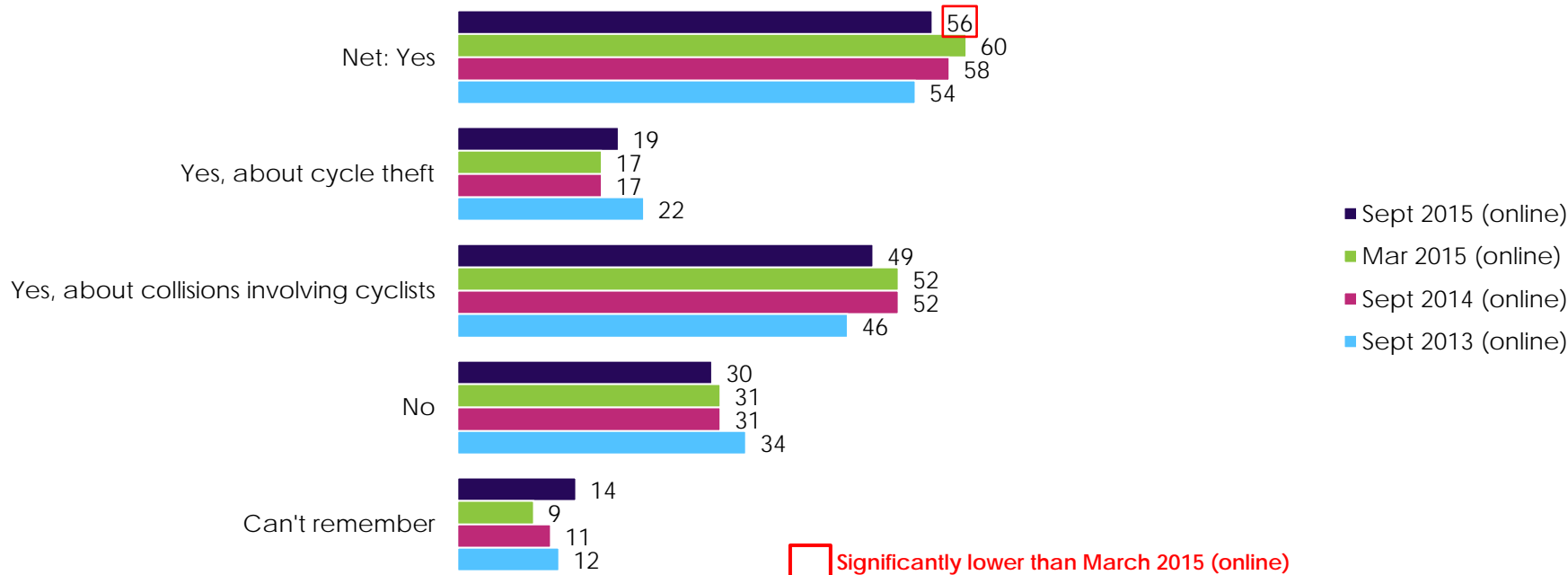
L1: To what extent do you agree or disagree with the following statements about cycle crime in London?

Base: all (1164)

# 56 per cent of Londoners have seen news or social media coverage about cycle theft or collisions involving cyclists in the last month, down 4 per cent compared with last wave

## News and social media coverage

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



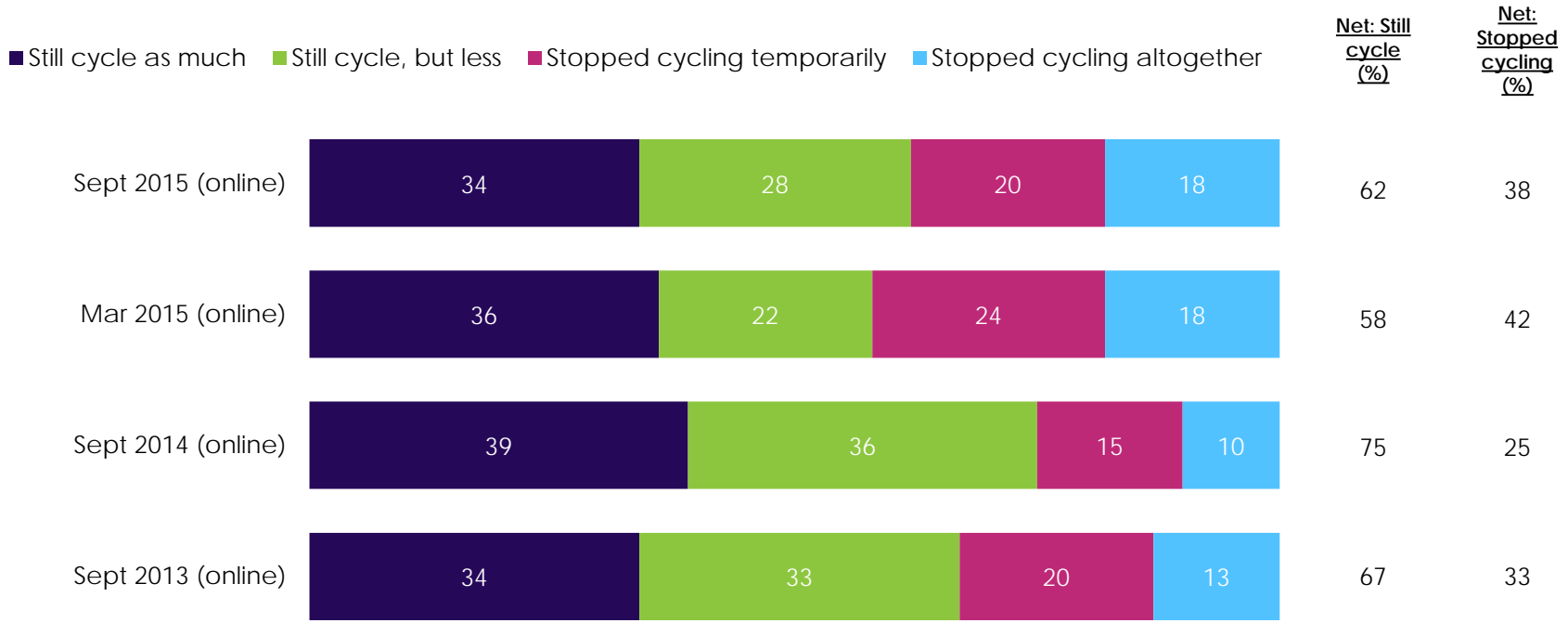
L4: Have you seen any news or social media coverage about cycle theft or collisions involving cyclists in the last month?

Base: All respondents: Sept 2015 (online) (1164), Mar 2015 (online) (1214), Sept 2014 (online) (1180), Sept 2013 (online) (1333)



# The majority of those who have had a bike stolen still cycle but it does have an impact with one in five stopping cycling temporarily and one in six stopping altogether

## Impact of cycle theft on level of cycling – %



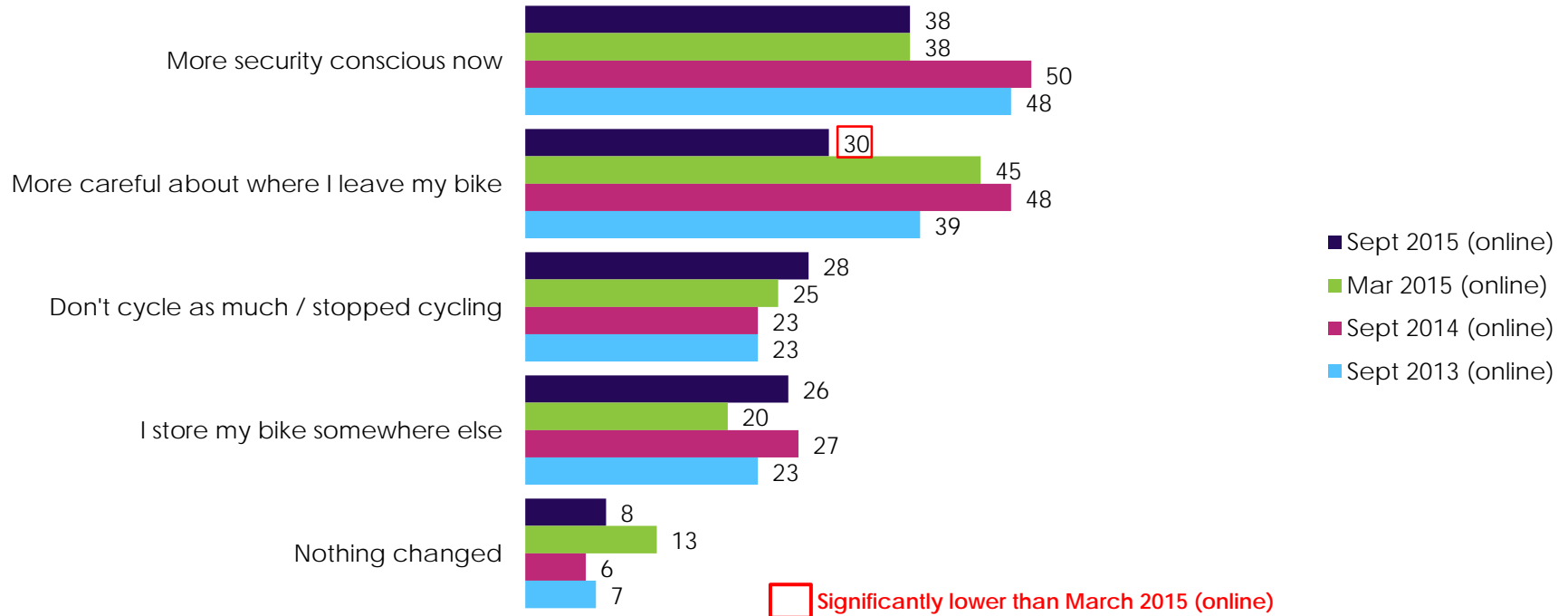
L12: What impact did being a victim of theft have on your level of cycling?

Base: Those who have had a bike stolen – Sept 2015 (online) (191), Mar 2015 (online) (215), Sept 2014 (online) (207), Sept 2013 (online) (320)



# Being more security conscious generally, taking more care about where they leave their bike, not cycling so much and storing their bike somewhere else are the main preventative actions taken by those who have had their bike stolen

## Behavioural change as a result of cycle theft – %



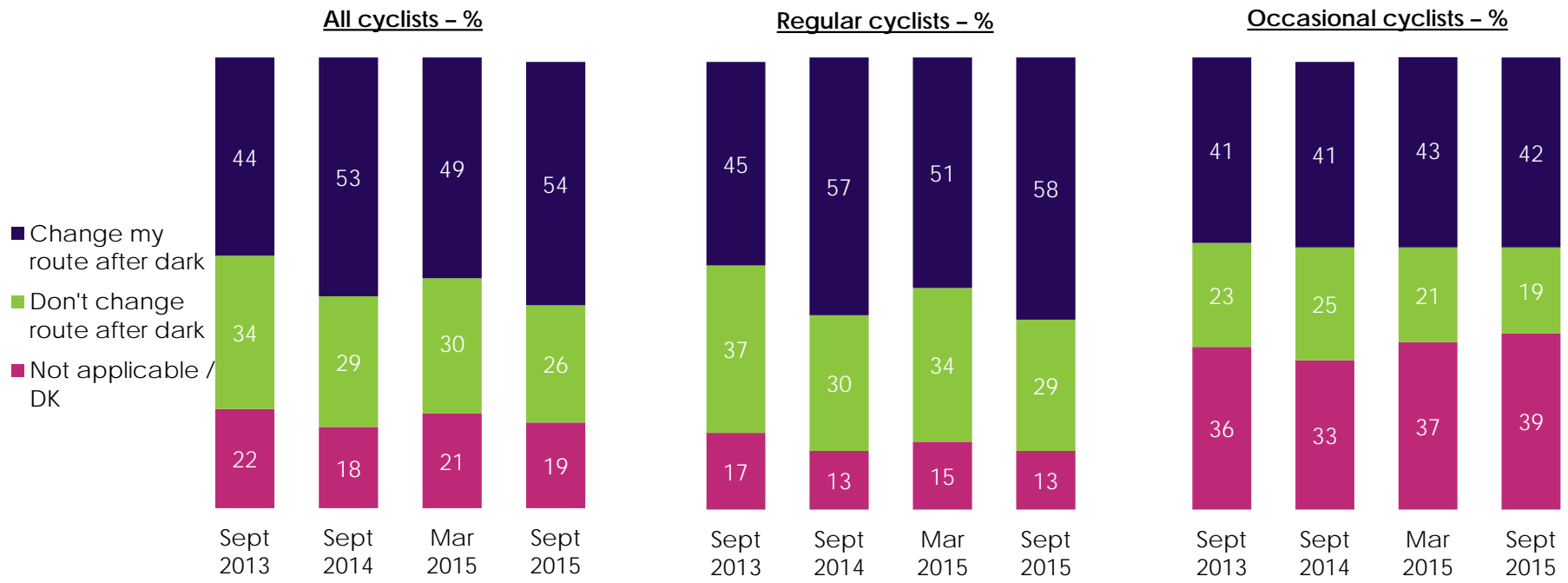
L13: Did being a victim of bike theft change anything about the way that you cycle?

Base: Those who have had a bike stolen Sept 2015 (online) (191), Mar 2015 (online) (215), Sept 2014 (online) (207), Sept 2013 (online) (320)



# Most cyclists change their route after dark. Results are similar to previous waves

## Change in cycling route after dark



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

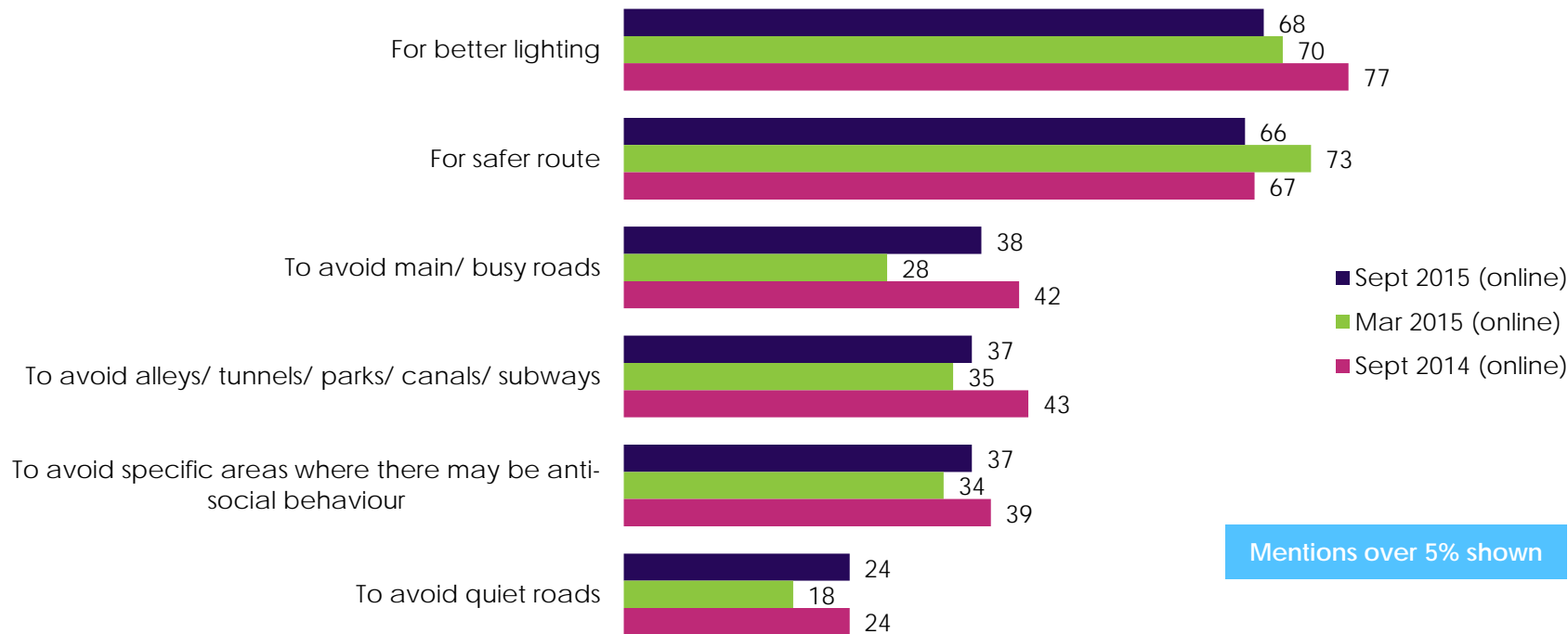
Base: All cyclists – Sept 2015 (online) (267), Mar 2015 (online) (284), Sept 2014 (online) (271), Sept 2013 (online) (509); Regular cyclists – Sept 2015 (online) (199) Mar 2015 (online) (209), Sept 2014 (online) (200), Sept 2013 (online) (387); Occasional cyclists – Sept 2015 (online) (68) Mar 2015 (online) (75), Sept 2014 (online) (71), Sept 2013 (online) (122)





# Better lighting, a safer route and to avoid busy roads and alleys/tunnels/subways are the main reasons for changing cycling routes after dark as with previous waves

## Reasons for change in cycling route after dark – %



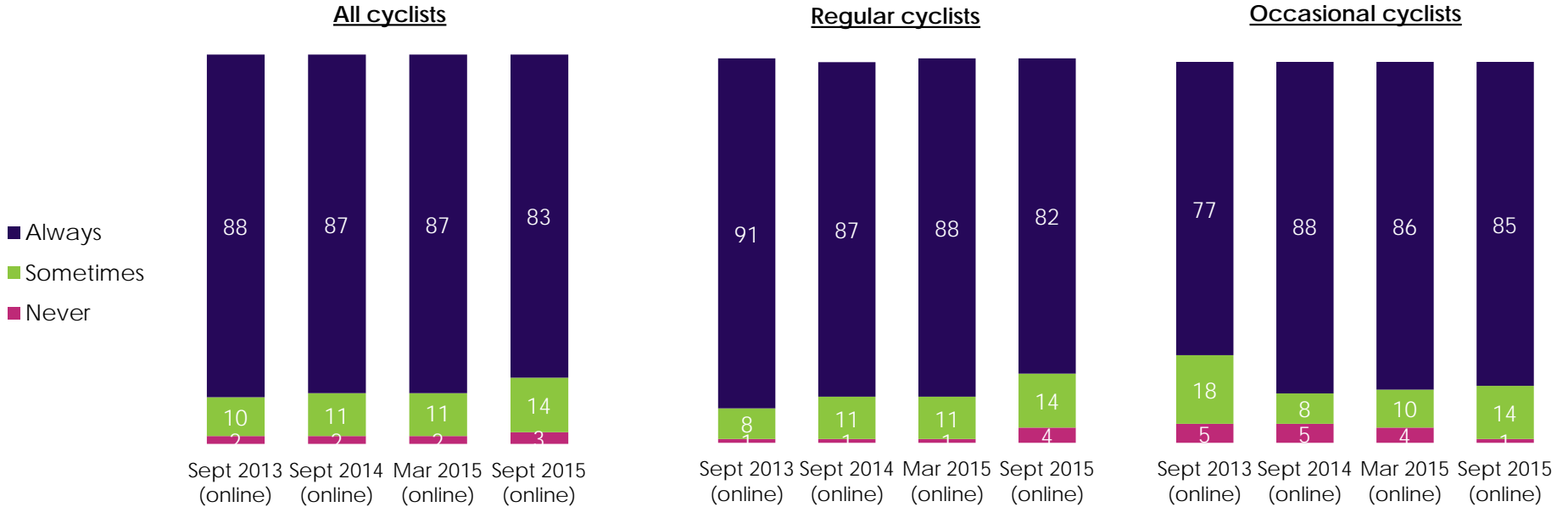
K5b: Why do you change your cycling route when you are travelling in the dark?

Base: All cyclists who change their cycling route when they are travelling in the dark (Sept 2015: 137, Mar 2015:135, Sept 2014: 222)



# Most cyclists continue to say they lock up their bike when they are out and about although the long term trend is slightly down

Locking bicycle when out and about – %



QLOCK1. When you're out and about on the bicycle you have access to how often do you secure it by locking it up?

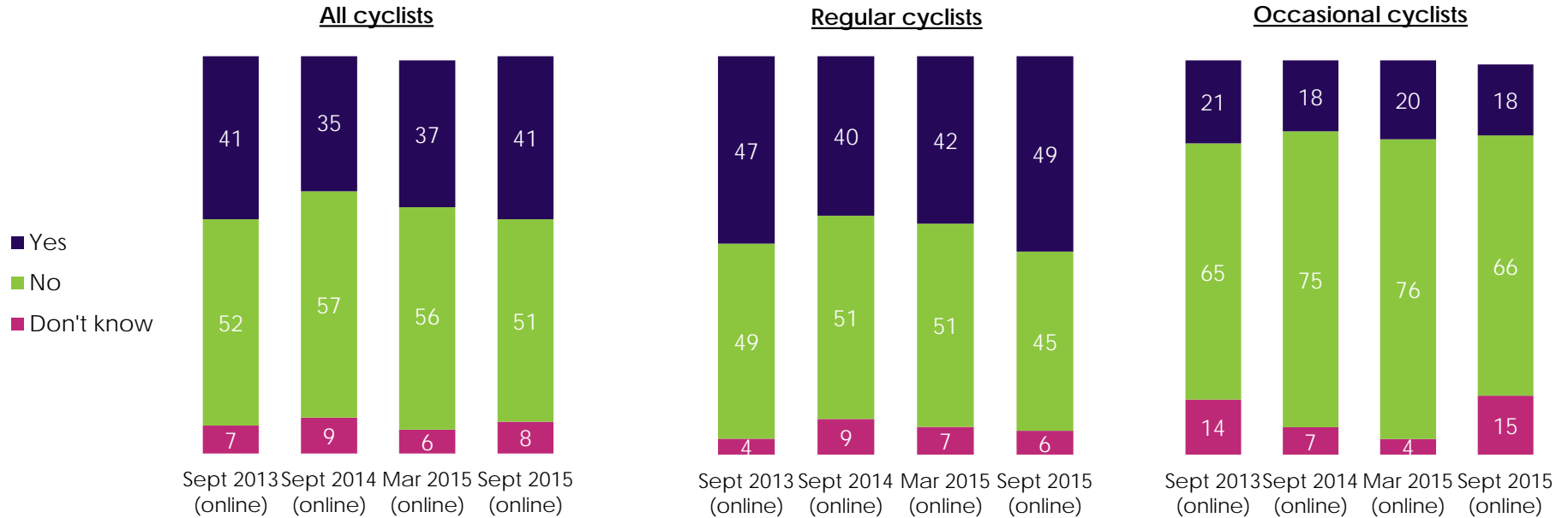
Base: all cyclists who cycle at least once a month, or less but have access to a bicycle – Sept 2015 (online) (498), Mar 2015 (online) (493), Sept 2014 (online) (516), Sept 2013 (online) (503)

Regular cyclists – Sept 2015 (online) (369), Mar 2015 (online) (376), Sept 2014 (online) (395), Sept 2013 (online) (387)

Occasional cyclists – Sept 2015 (online) (129) Mar 2015 (online) (117), Sept 2014 (online) (121), Sept 2013 (online) (116)

# Four in ten have their bike marked or registered with the police. This is higher among regular cyclists (49 per cent)

Cycle marking/ registration with police – %



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

Base: all cyclists who cycle at least once a month, or less but have access to a bicycle – Sept 2015 (online) (498), Mar 2015 (online) (493), Sept 2014 (online) (516), Sept 2013 (online) (503)

Regular cyclists – Sept 2015 (online) (369), Mar 2015 (online) (376), Sept 2014 (online) (395), Sept 2013 (online) (387)

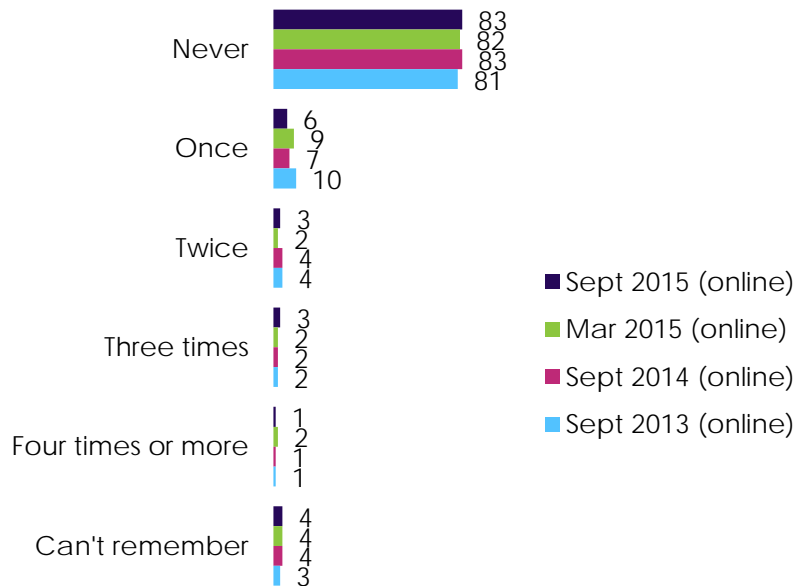
Occasional cyclists – Sept 2015 (online) (129) Mar 2015 (online) (117), Sept 2014 (online) (121), Sept 2013 (online) (116)



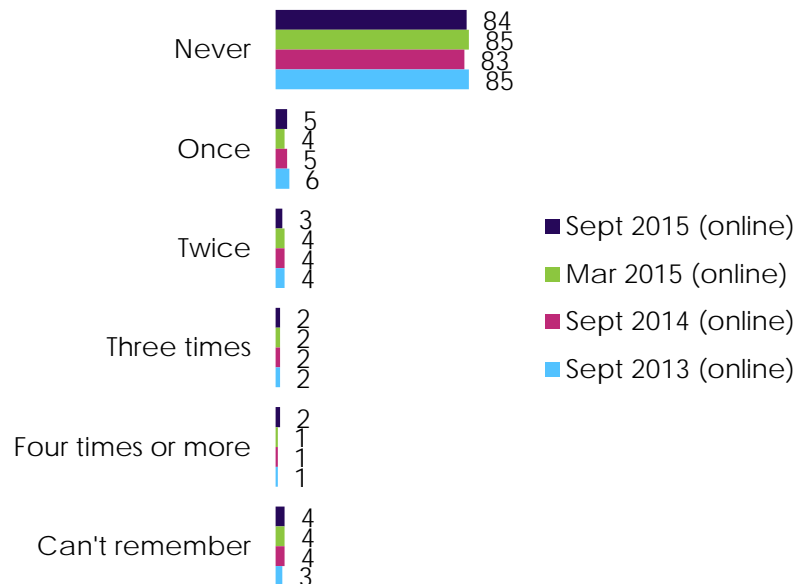
# Most Londoners continue to report that they have never had a bike, or part of one stolen in line with previous waves

## Reported incidence of cycle theft

Number of times had whole bike stolen - %



Number of times had part of a bike stolen - %

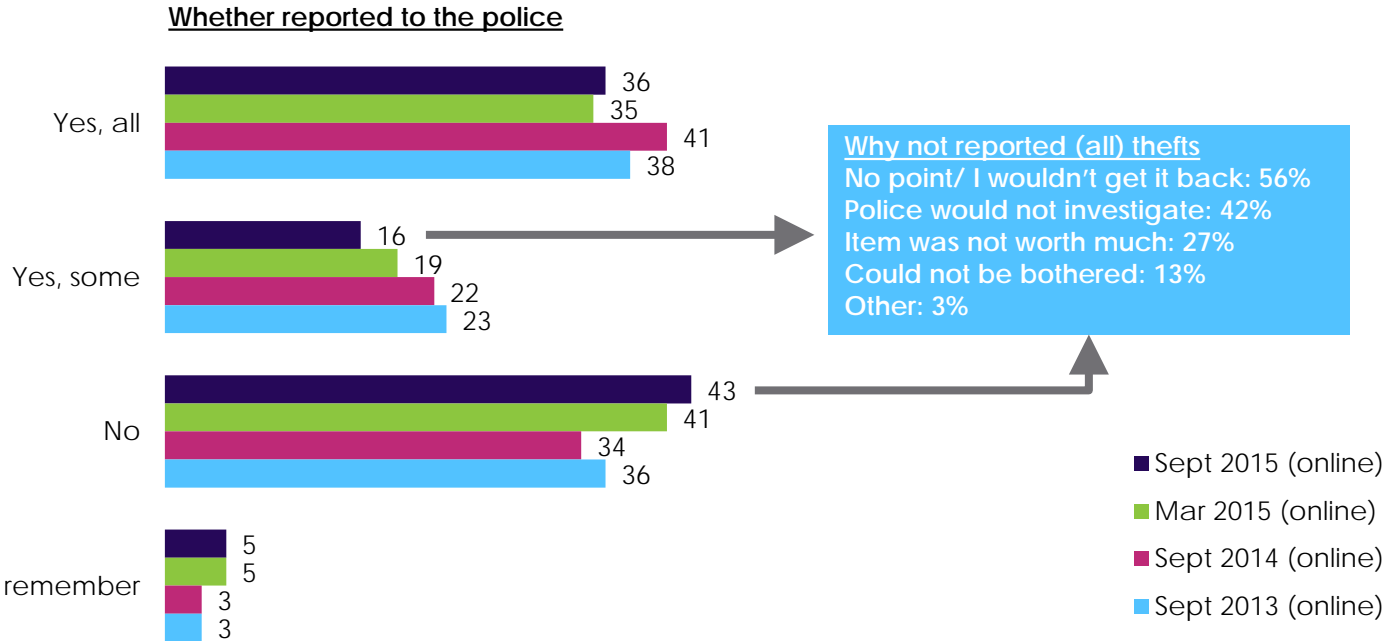


L5: In the last couple of years, have you ever had a bike - or part of a bike - stolen?

Base: all - Sept 2015 (online) (1164), Mar 2015 (online) (1214), Sept 2014 (online) (1180), Sept 2013 (online) (1333)

36 per cent of those having a bike or part of a bike stolen, reported this to the police. The trend in reporting to the police is downwards with most saying that there is no point/ they won't get the bike back or that the police won't investigate

Whether reported thefts to police – %



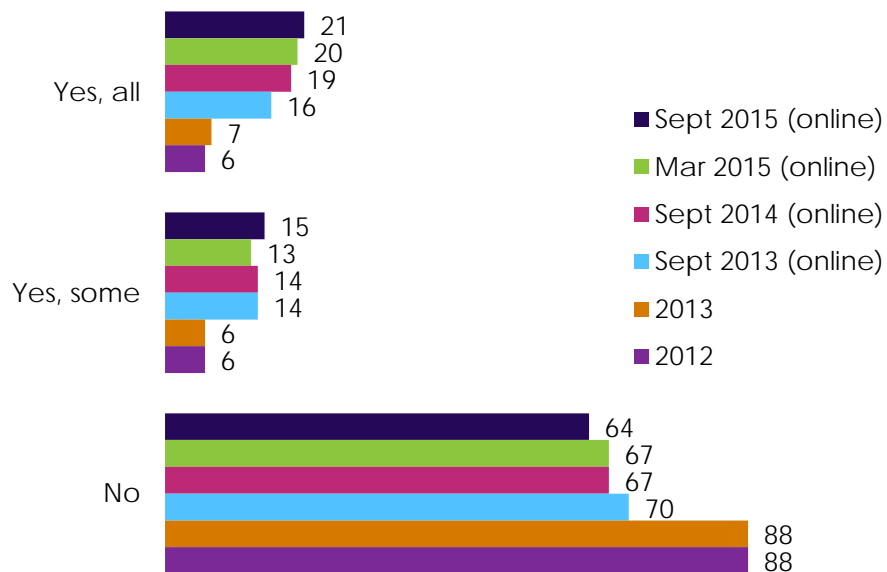
L7: Did you report any of these incidents/the incident to the police? Base: all who have had (part of) bike stolen – Sept 2015 (online) (191), Mar 2015 (online) (215), Sept 2014 (online) (207), Sept 2013 (online) (223)

L9: Why didn't you report (all of) the incident(s) to the police? Base: all not reporting it to the police – Sept 2015 (online) (112)

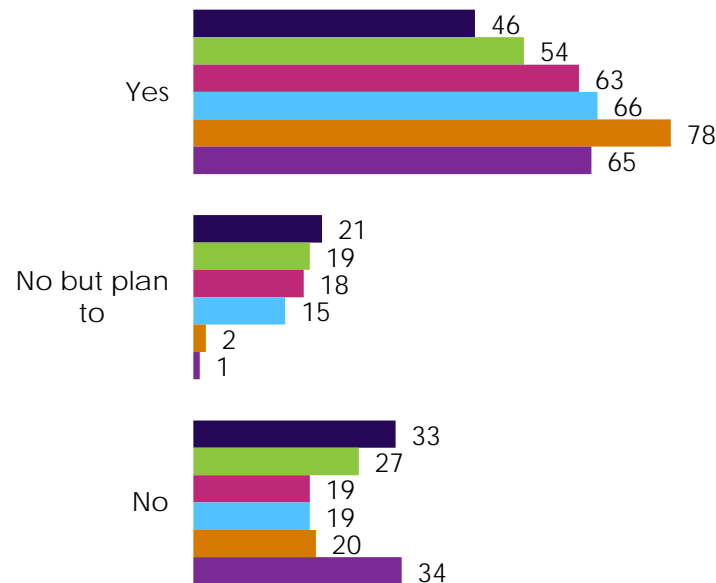
The proportion recovering their stolen items (or some of them) has been climbing slowly over the past three waves and now stands at 36 per cent. However, people are becoming less likely to replace items that are not recovered

## Whether stolen items were recovered / replaced

Whether recovered items that were stolen - %



Whether replaced the items not recovered - %

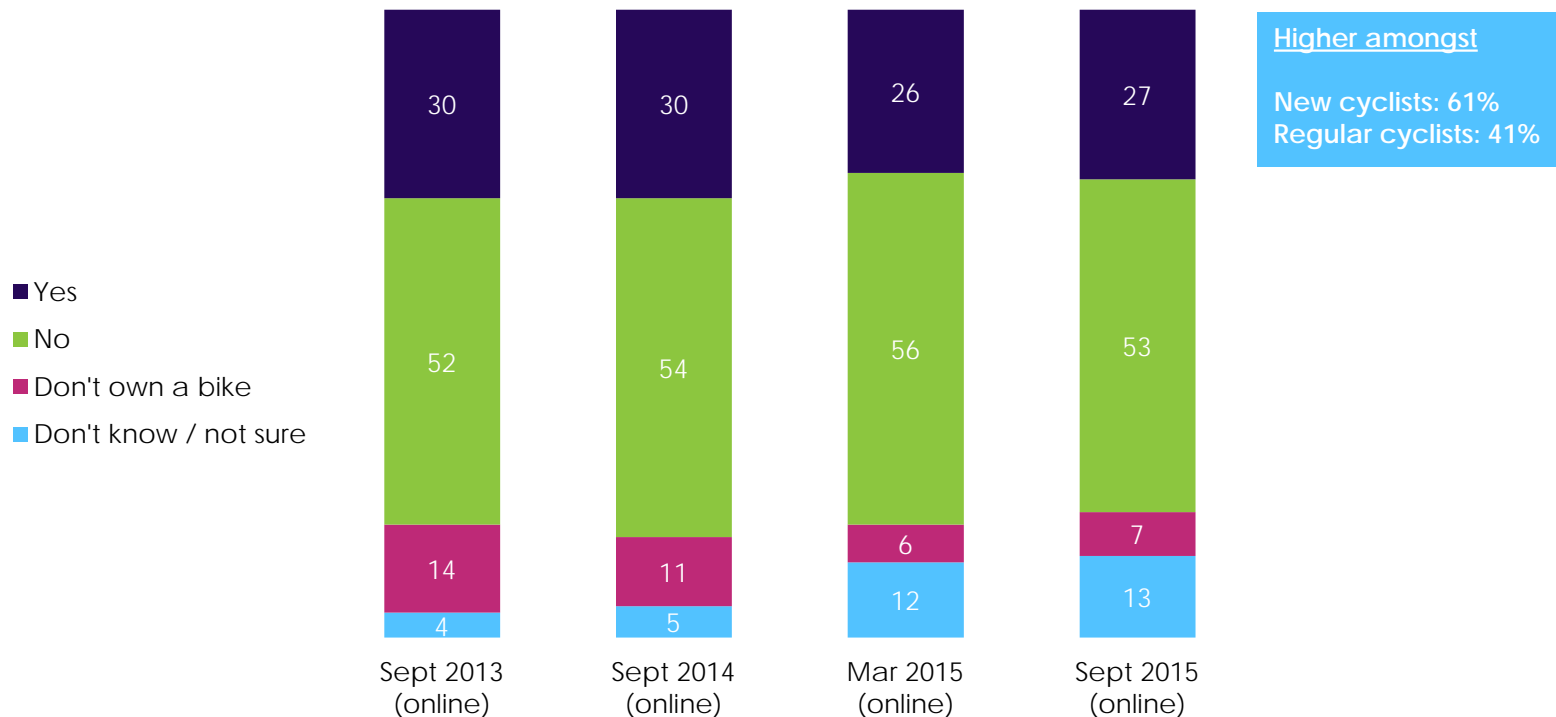


L10: Did you recover the items that were stolen? Base: Those who have had a bike stolen – Sept 2015 (online) (191), Mar 2015 (online) (215), Sept 2014 (online) (207), Sept 2013 (online) (320)

L11: Did you replace the items that you did not recover? Base: Those who have had a bike stolen and haven't recovered – Sept 2015 (online) (151), Mar 2015 (online) (176), Sept 2014 (online) (169), Sept 2013 (online) (272)

27 per cent of those with access to a bike have insured it against theft, in line with previous waves. New cyclists (starting in the last 12 months) are much more likely to insure their bikes (61 per cent)

## Cycle insurance – %



L14: Is your bike insured against theft? If you have more than one bike, please think about the bike that you use most often.

Base: All respondents who have access to a bike Sept 2015 (online) (677), Mar 2015 (online) (686), Sept 2014 (online) (707), Sept 2013 (online) (915)



Cycling confidence

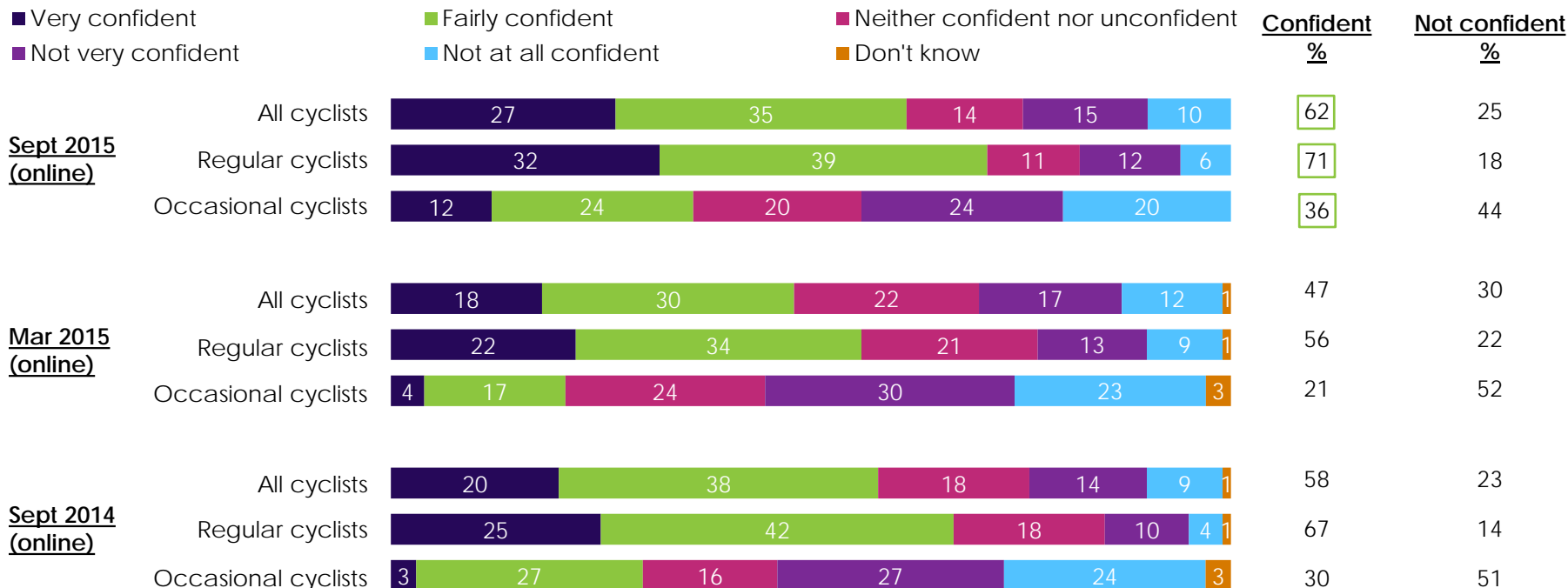


# Cycling confidence – summary of key findings

- 81 per cent of cyclists feel confident cycling in their local area and 62 per cent feel confident cycling in London generally. This rises to 84 per cent and 71 per cent respectively, among regular cyclists
  - Confidence cycling in London generally has increased significantly compared to last wave
- On balance more cyclists believe cycling it is getting safer (53 per cent) than believe it is becoming more dangerous (19 per cent). These results are marginally better than March 2015
- When considering cycling in the local area, there have been significant rises in the proportions believing it is getting safer
- More than half of cyclists feel less confident when cycling near HGVs, on busy roads, in bad weather or near buses (similar results to previous waves)
- Cycling on the pavement is still the most common 'bad' behaviour admitted to by cyclists and significantly up on last wave (72 per cent admit to this). More are also owning up to cycling through red lights and cycling while using a mobile phone

# Cyclists feel more confident when cycling in London generally compared to last wave. This is true of both regular and occasional cyclists

## Cycling confidence in London generally – %



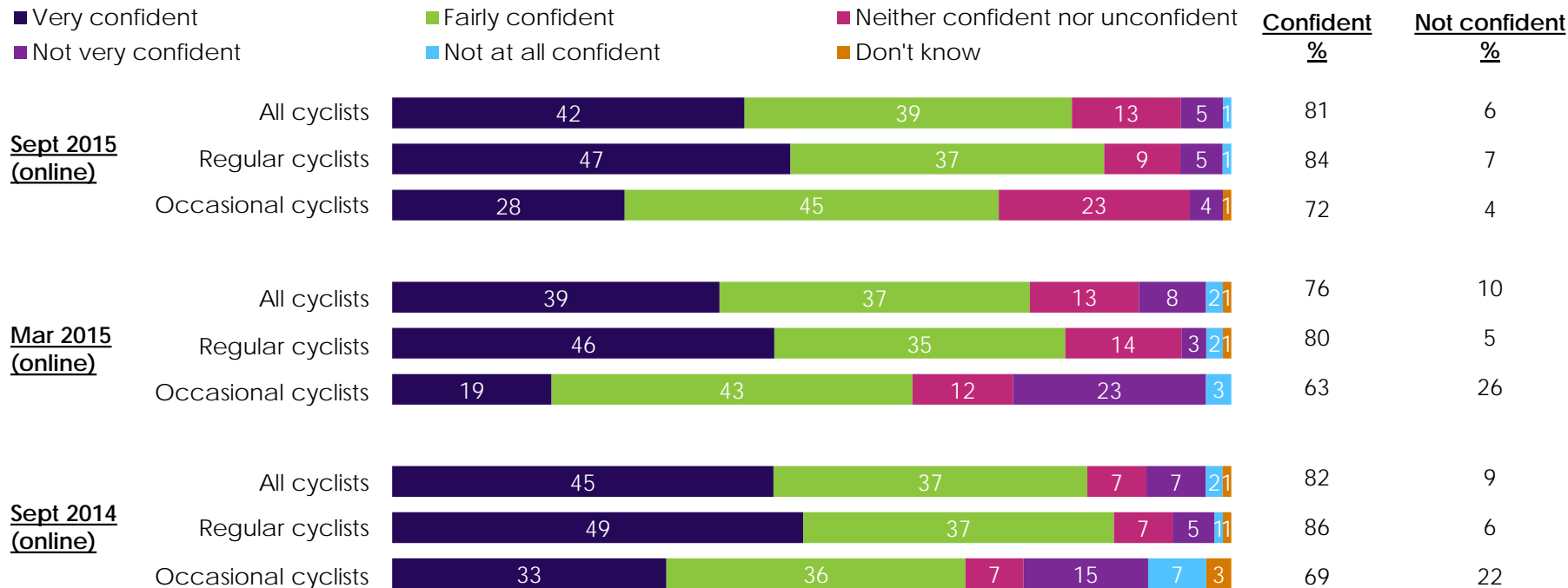
J1a: Generally, how confident do you feel cycling in London?

Base: Those who have cycled around London within the last 12 months Sept 2015 (267), regular cyclists (199), occasional cyclists (68), Mar 2015 (284), regular cyclists (209), occasional cyclists (75), Sept 2014 (online) (271), regular cyclists (200), occasional cyclists (71)

  Significantly higher than March 2015 (online)

# Confidence when cycling in the local area is greater than when cycling in London generally and remains at the same level as in March 2015

## Cycling confidence in local area – %



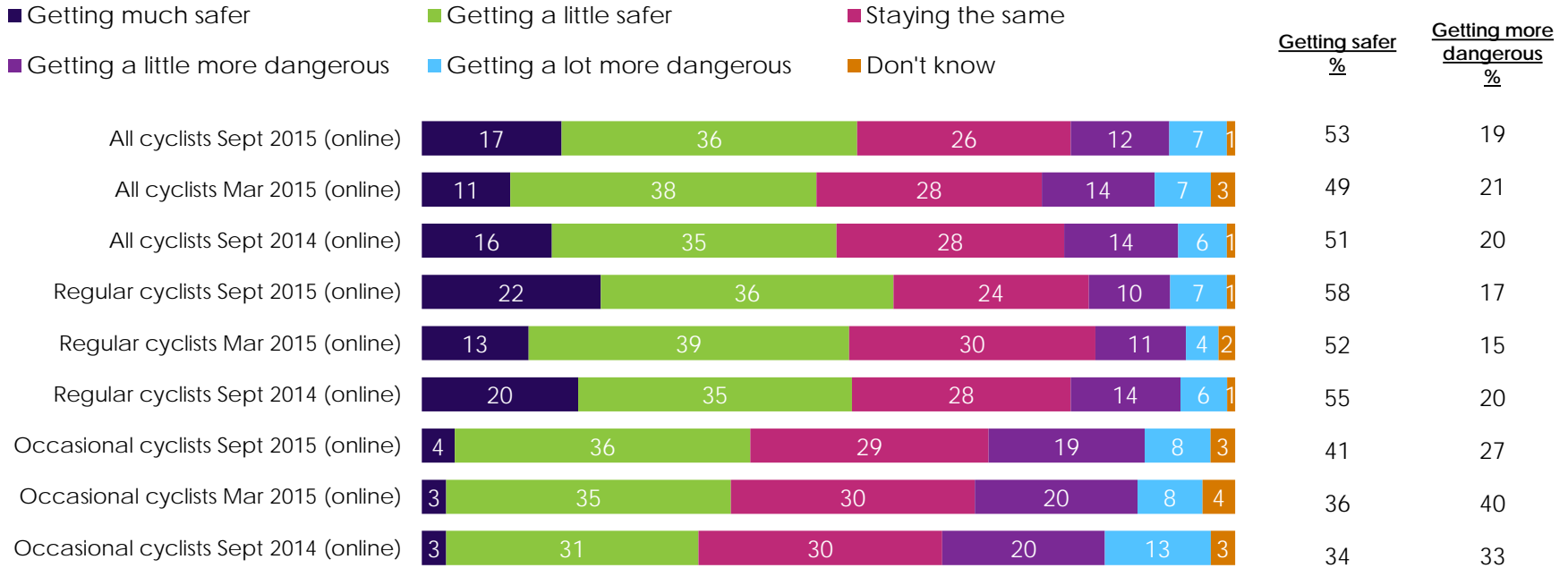
J1b: Generally, how confident do you feel cycling in your local area?

Base: Those who have cycled around London within the last 12 months Sept 2015 (267), regular cyclists (199), occasional cyclists (68), Mar 2015 (284), regular cyclists (209), occasional cyclists (75), Sept 2014 (online) (271), regular cyclists (200), occasional cyclists (71)



53 per cent think that cycling in London generally has become safer while a 19 per cent think it is becoming more dangerous. Regular cyclists are more likely to say that it is becoming safer than occasional cyclists. Results are largely in line with previous waves

## Perceptions of increased safety for cycling (in London) – %



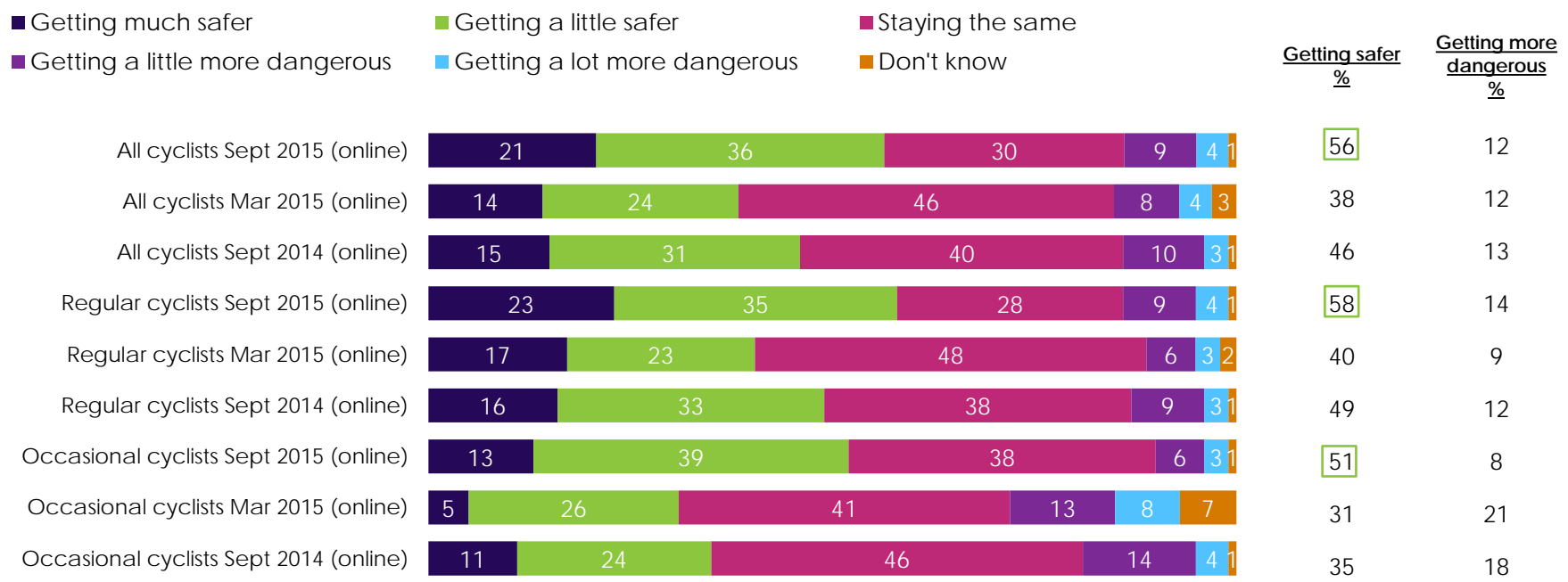
J5a. In London, Do you think cycling is getting safer, getting more dangerous, or staying the same...?

Base: Sept 2015 (online) All cyclists (267), Regular cyclists (199), occasional cyclists (68) Mar 2015 (online) All cyclists (284), Regular cyclists (209), occasional cyclists (75) Sept 2014 (online) All cyclists (271), Regular cyclists (200), occasional cyclists (71)



# When thinking about cycling in their local area, a higher proportion of cyclists, both regular and occasional, feel that it is getting safer when compared to the March 2015 study

## Perceptions of increased safety for cycling (in your local area) – %



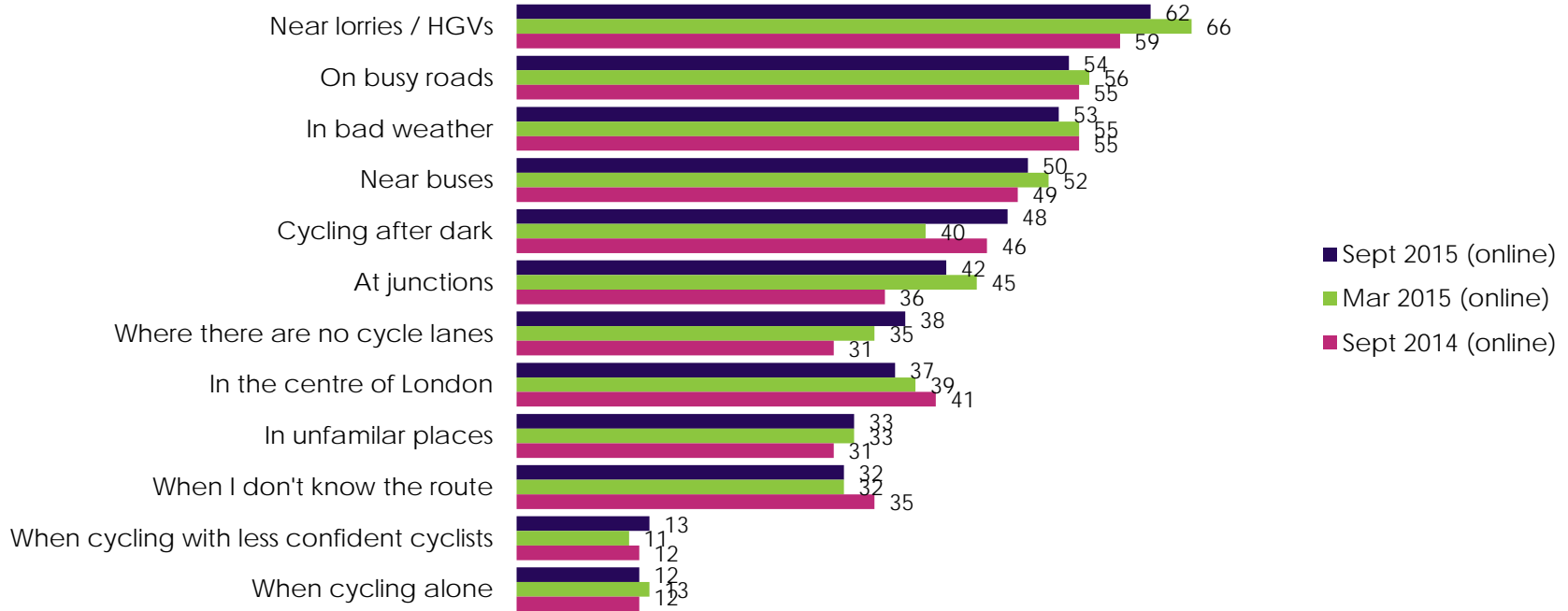
J5a. In your local area, Do you think cycling is getting safer, getting more dangerous, or staying the same...? 56 Significantly higher than March 2015 (online)

Base: Sept 2015 (online) All cyclists (267), Regular cyclists (199), occasional cyclists (68), Mar 2015 (online) All cyclists (284), Regular cyclists (209), occasional cyclists (75) Sept 2014 (online) All cyclists (271), Regular cyclists (200), occasional cyclists (71)



# More than half of cyclists continue to say they feel less confident when cycling near HGVs, on busy roads, in bad weather or near buses. Half are less confident when cycling after dark

## Situations in which cyclists feel less confident – %



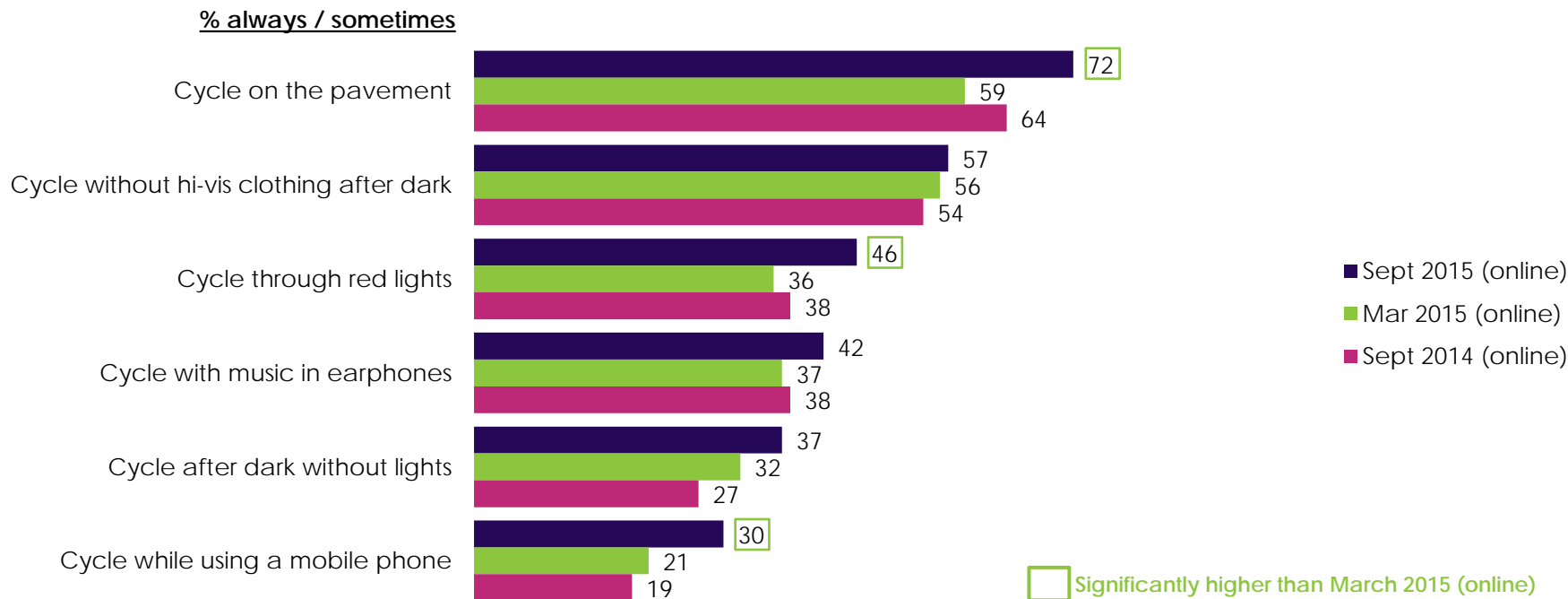
Significantly higher than March 2015 (online)

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

Base: All cyclists – Sept 2015 (online) (267), Mar 2015 (online) (284), Sept 2014 (online) (271)

# Cycling on the pavement continues to be the most common 'bad' behaviour admitted to by cyclists, and significantly up on last wave (72 per cent admit to this). Most bad behaviours are on the rise

## Prevalence of 'cycling behaviours'



J3: While cycling in London, how often, if ever, do you do any of the following?

Base: all cyclists – Sept 2015 (online) (267), Mar 2015 (online) (284), Sept 2014 (online) (271)



# TfL Cycle Journey Planner



# Awareness and use of the Cycle Journey Planner are largely in line with previous waves. There has been a significant rise in the proportion of users rating the Cycle Journey Planner as very good

## TfL Cycle Journey Planner

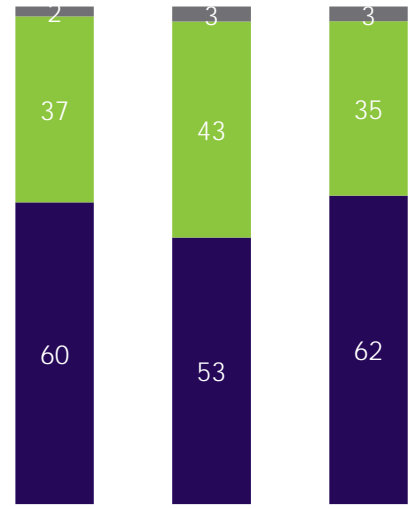
**Awareness of TfL Cycle Journey Planner (%)**

■ Yes ■ No



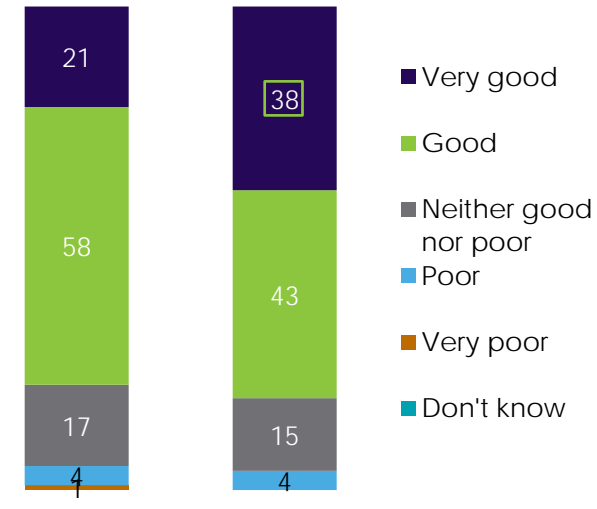
**Ever used TfL Cycle Journey Planner (%)**

■ Yes ■ No ■ Not sure / don't remember



**Perceptions of TfL Cycle Journey Planner (%)**

□ Significantly higher than March 2015 (online)



- Very good
- Good
- Neither good nor poor
- Poor
- Very poor
- Don't know

Sept 2014 (online) Mar 2015 (online) Sept 2015 (online) Sept 2014 (online) Mar 2015 (online) Sept 2015 (online) Mar 2015 (online) Sept 2015 (online)

JP1: Are you aware that the Journey Planner on Transport for London's website can also plan cycle routes? Base: All cyclists Sept 2015 (online) (505), Mar 2015 (online) (506), Sept 2014 (online) (531)  
 JP2: Have you ever used the TfL Journey Planner to plan a cycle route? Base: All cyclists aware that the TfL Journey Planner can also be used to plan cycle routes: Sept 2015 (online) (344), Mar 2015 (online) (354), Sept 2014 (online) (359)  
 JP3: How would you rate the TfL Journey Planner for planning cycle routes? Base: All cyclists who have used Journey Planner Sept 2015 (online) (204), Mar 2015 (online) (190)





# Appendix



# Appendix

## Methodology

- The research comprised 2,038 online interviews with adult Londoners, plus 121 further interviews with cyclists to boost the total sample of cyclists to 505
- Data collection took place from 29 September – 3 November 2015
- The survey took place online using one of Future Thinking's online panel providers. In order to achieve as a representative sample as possible, non-interlocking quotas were set on gender, age, ethnicity, working status and inner / outer London boroughs
- The final data set was weighted back to be representative of Londoners in terms of age, gender, inner/outer London, ethnicity and working status according to 2011 census data



# Sample profile

Variable	%
Gender	
Men	49
Women	51
Age	
16-24	15
25-34	25
35-44	19
45-54	16
55-64	11
65+	14
Ethnicity	
White	63
BAME	37

Variable	%
Working status	
Working	61
Not-working	39
Social class	
AB	49
C1	31
C2	9
DE	10

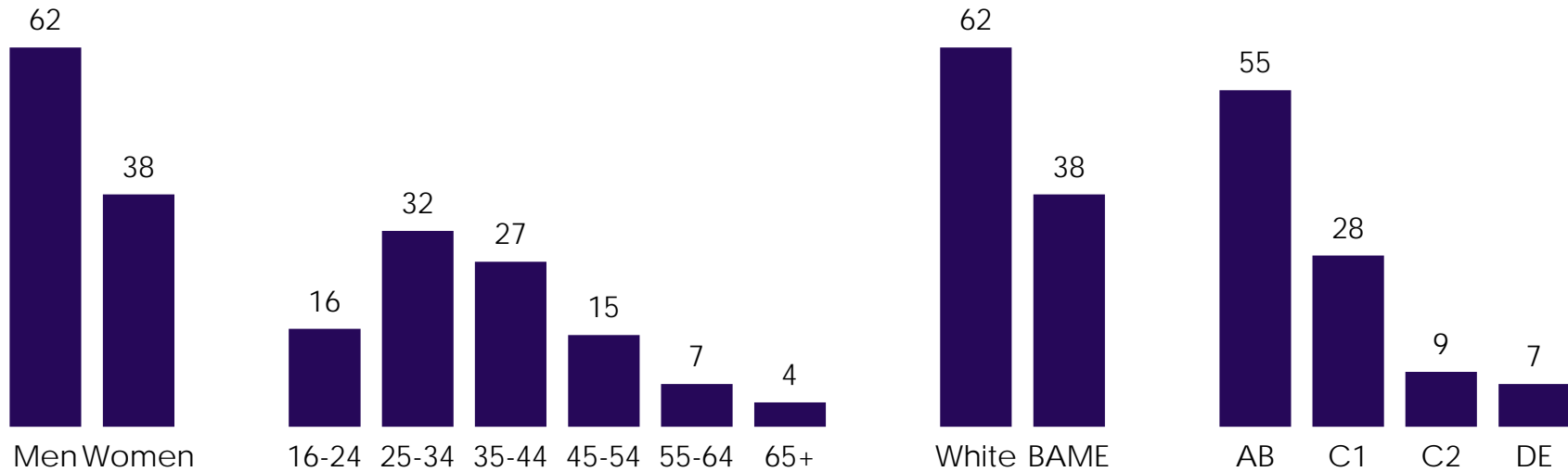
# Socio-economic group definitions

Socio-economic group	Occupation of chief income earner in household
AB	Higher managerial, administrative or professional / Intermediate managerial, administrative or professional
C1	Supervisory or clerical, junior managerial, administrative or professional or students
C2	Skilled manual workers
DE	Semi and unskilled manual workers / State pensioners or widows (no other earner), casual or lowest grade workers



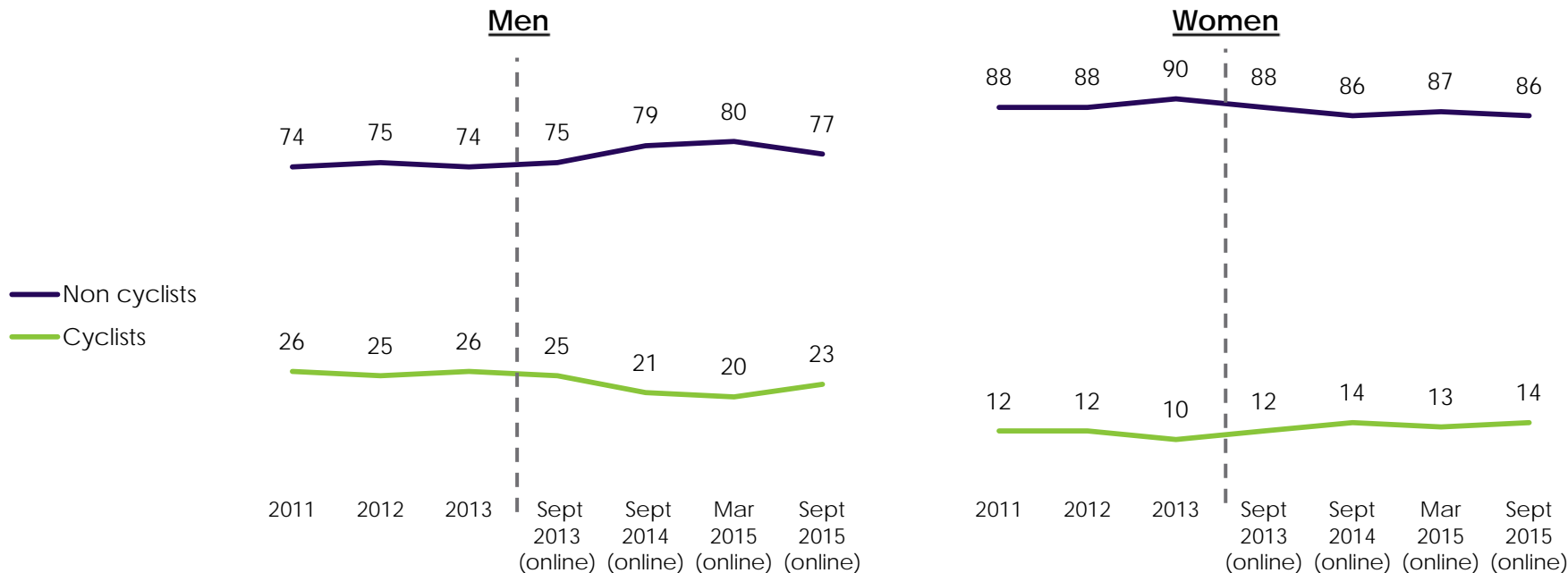
# Demographic profile of cyclists in London

■ Sept 2015...



# The proportion of men cycling has risen from 20 per cent to 23 per cent and for women, from 13 per cent to 14 per cent in the latest wave

Proportion of cyclists (trend) – %



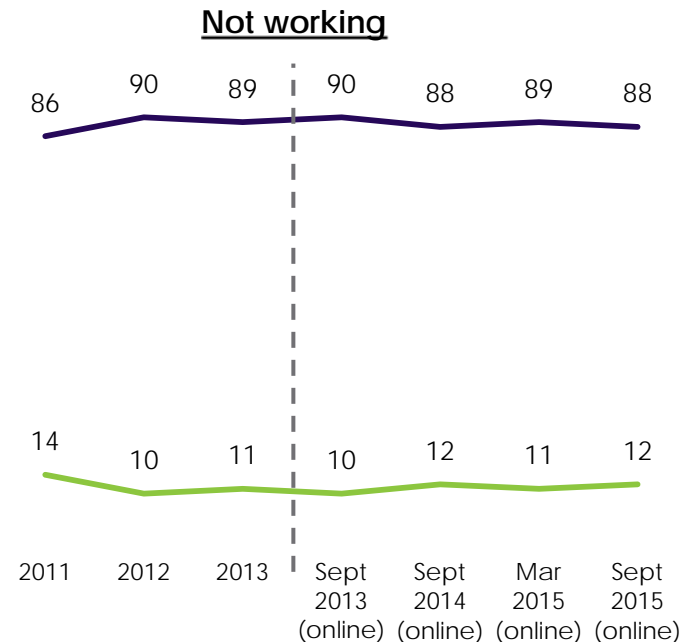
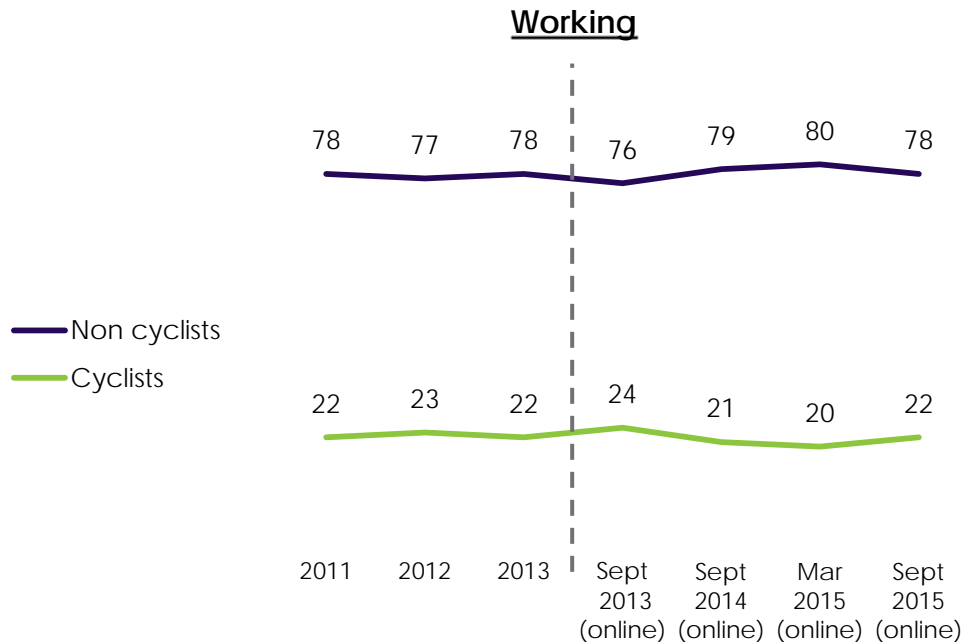
Demographic questions

Base: All – Men (1023) – Women (1136)



# The proportions of both working and non-working Londoners who cycle are both slightly up on last wave

Proportion of cyclists (trend) – %



Demographic questions

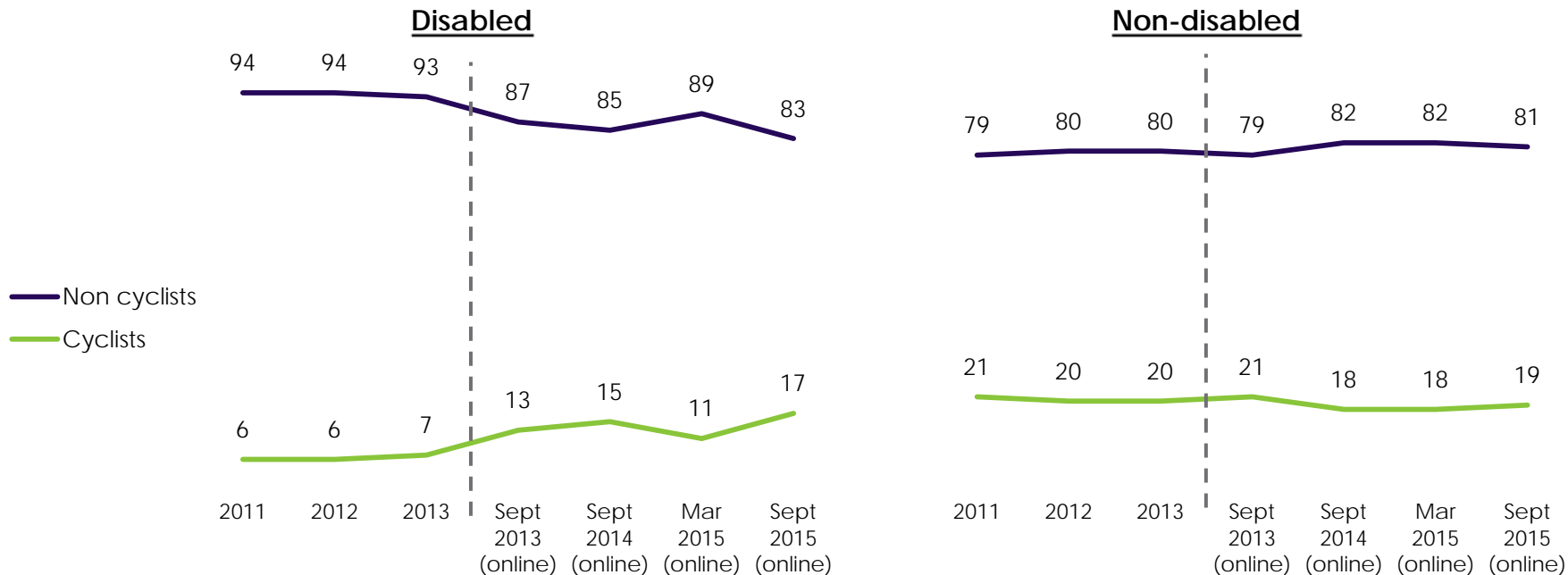
Base: All – Working (1495) – Non-working (664)





# This wave sees a higher proportion of disabled Londoners cycling

Proportion of cyclists (trend) – %



Demographic questions

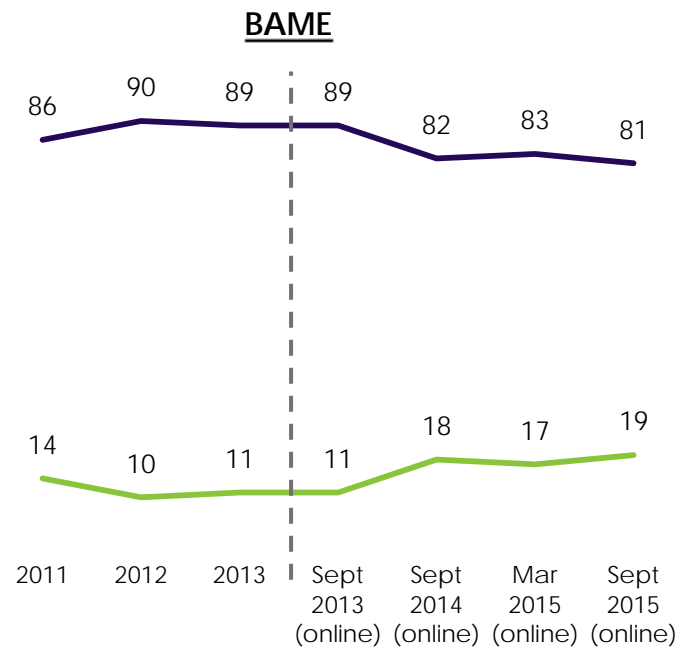
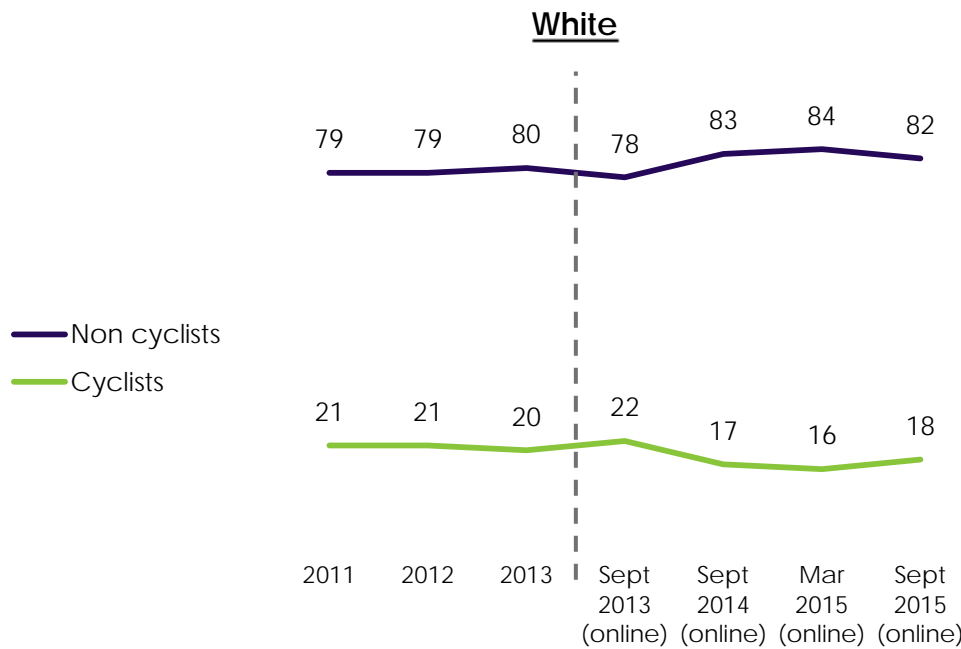
Base: All – Disabled (499), Non-disabled (1614)





# The proportions of White and BAME Londoners cycling are both slightly higher than last wave

Proportion of cyclists (trend) – %

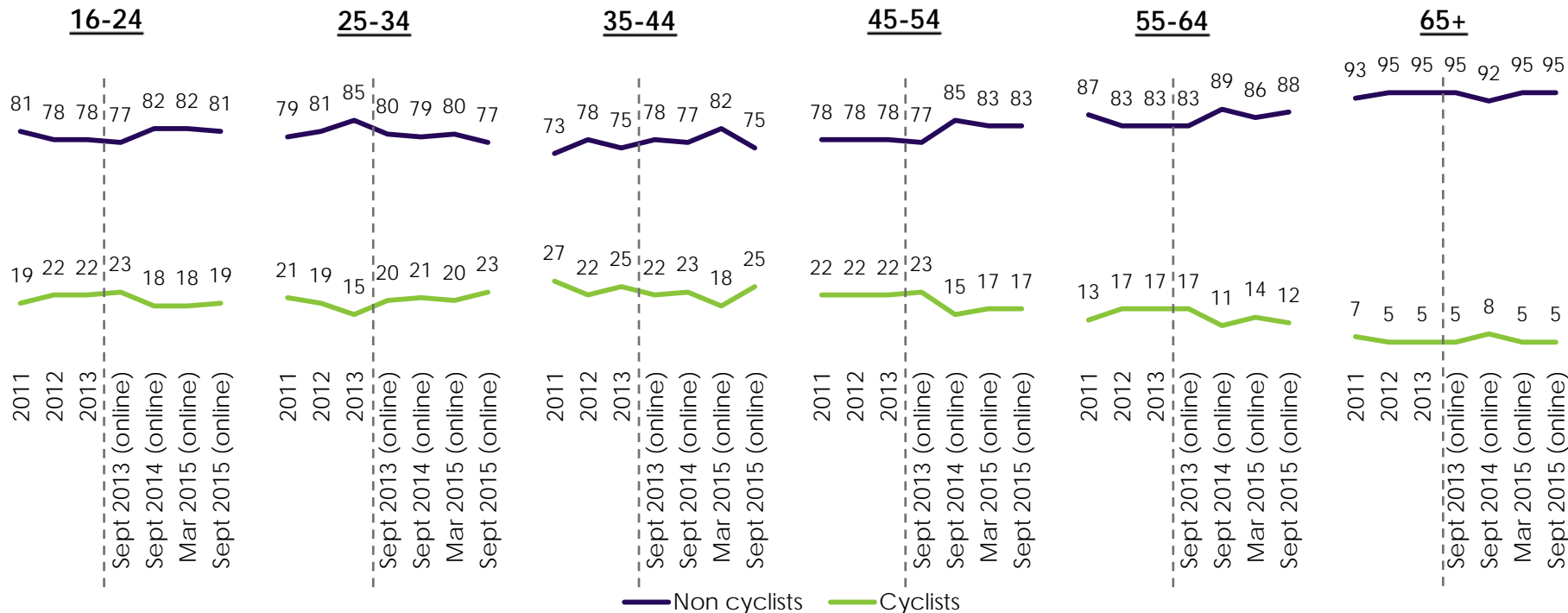


Demographic questions  
Base: All – White (1613), BAME (546)



# 35-44s see the largest increase in the proportion who are cyclists (up from 18 per cent in March to 25 per cent in September)

## Proportion of cyclists – %



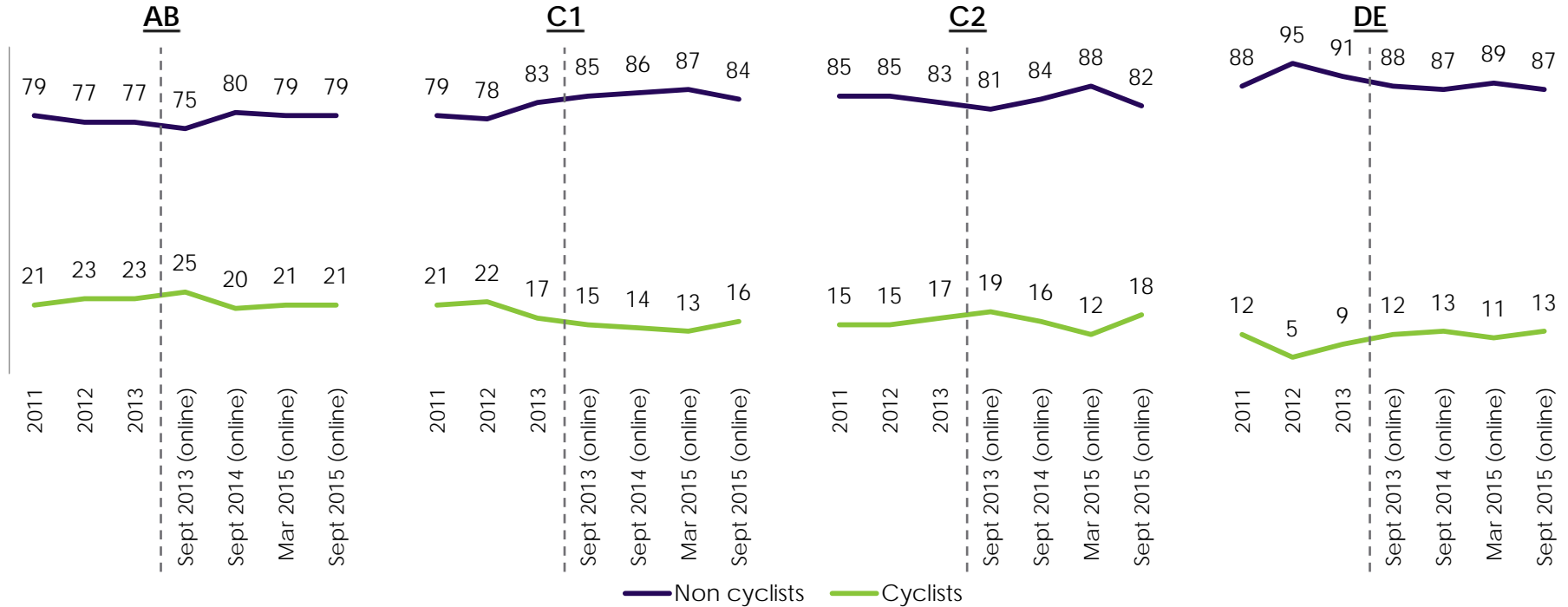
Demographic questions

Base: All – 16-24 (239), 25-34 (525), 35-44 (435), 45-54 (375), 55-64 (273), 65+ (312)



# The cycling level among C2s has risen from 12 per cent in March to 18 per cent in September

Proportion of cyclists – %



Demographic questions

Base: All – AB (1097), C1 (672), C2 (189), DE (186)



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