



synovate

Research reinvented

Cycle Training June 07 to March 08

Prepared for: TfL
Prepared by: LH/MS
Date: May 30th 2008

Copyright:

© 2008. Synovate Ltd. All rights reserved.
The concepts and ideas submitted to you herein are the intellectual property of Synovate Ltd. They are strictly of confidential nature and are submitted to you under the understanding that they are to be considered by you in the strictest confidence and that no use shall be made of the said concepts and ideas, including communication to any third party without Synovate Ltd's express prior consent.



synovate

Research reinvented

Contents

Background.....	2
Research objectives.....	2
Attendance at cycle training.....	3
Changes in cycling frequency as a result of the training.....	5
Attitudes to cycling on London's roads as a result of the training	7
Likelihood to attend cycling training in next 12 months.....	9

Background

One of the targets for TfL is to reduce congestion and increase cycling in London. TfL work with all the London boroughs and 'cycling England' to structure and fund cycle training in London with the overall aim of providing free or subsidized training through quality controlled courses and accredited instructors. In advance of more in-depth research later this year, we used the six Regular Research Slots (effectively omnibus surveys) which we conducted between June 2007 and March 2008 to identify people who have had cycling training. Each of those Regular Research Slots involves interviewing a sample of 1,000 Londoners by telephone, data being weighted to reflect the London population as a whole.

Research objectives

The research objectives for this study are as follows:

- To measure attendance at cycle training
- To see how behavior has changed as a result of cycling training in particular:
 - Changes in cycling frequency
 - Attitudes to cycling on London's Roads
- Measure the likelihood to attend training in the next 12 months

Attendance at cycle training

The chart below shows that just over a fifth of people have attended cycle training at some point in their lives, with a very small proportion (1%) having done so in the last year.



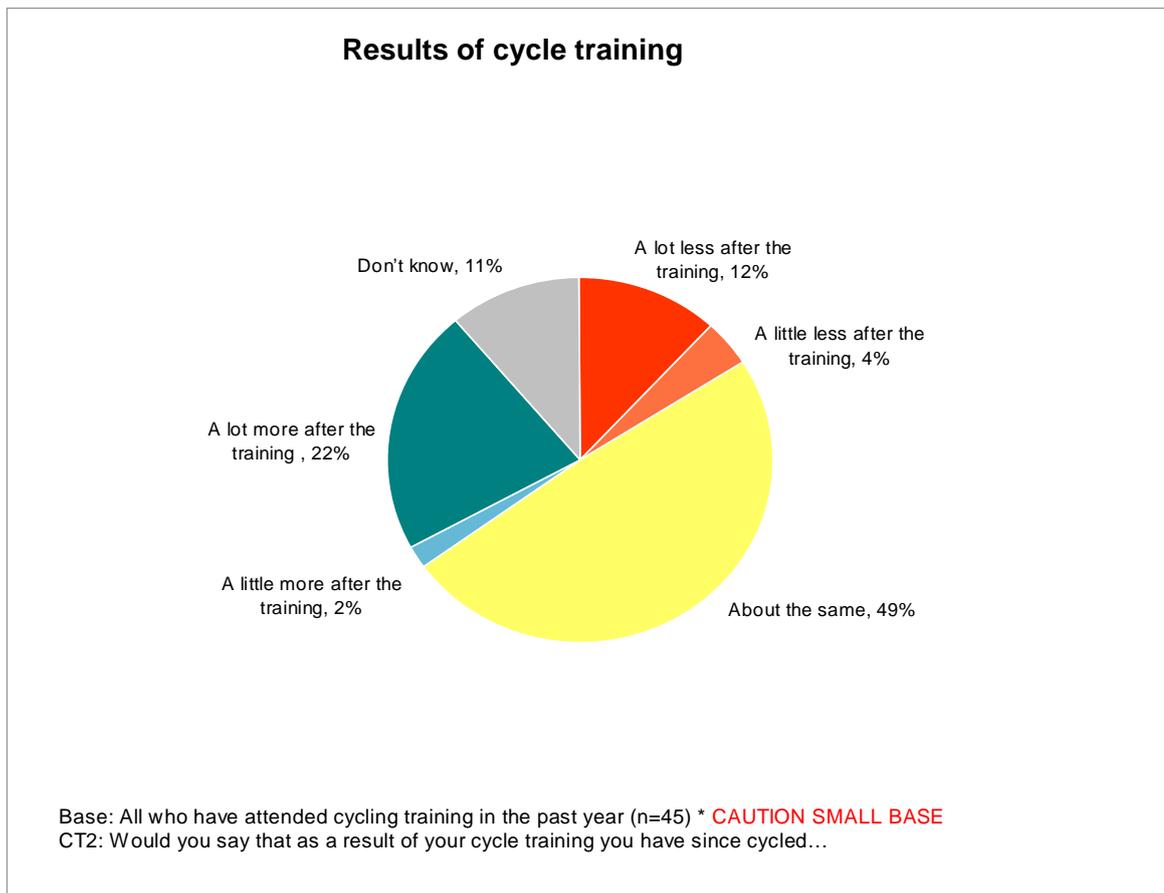
Demographic analysis:

All reported differences are statistically significant

Men were more likely to have attended cycle training than women (24% vs 18%), as were white people (25% vs 11% of BAME's) and those in full time work (25% vs 16% not working). Londoners in their middle age were also more likely to have attended training compared to those aged 65 and over (24% vs 14%) and younger people aged 16-24 (18%). Londoners who live in outer London were more likely to have attended than those who live in inner London (23% outer London vs 18% inner London), as were those in the highest socio economic classes compared to the lowest socio economic classes (AB 26% vs DE15%). Therefore, the typical profile of someone most likely to have attended cycle training would be a white, middle aged male, in full time employment and living in an affluent part of outer London.

Changes in cycling frequency as a result of the training

As the chart below shows, just under half (49%) of those 45 Londoners who told us that they have attended cycle training in the last year told us that they haven't changed their cycling patterns since they completed the training. A further one in ten didn't know or couldn't say. Overall, participants were more likely to have increased than to have decreased their cycling as a result of the training, with just over a fifth saying that they were doing a lot more cycling now.

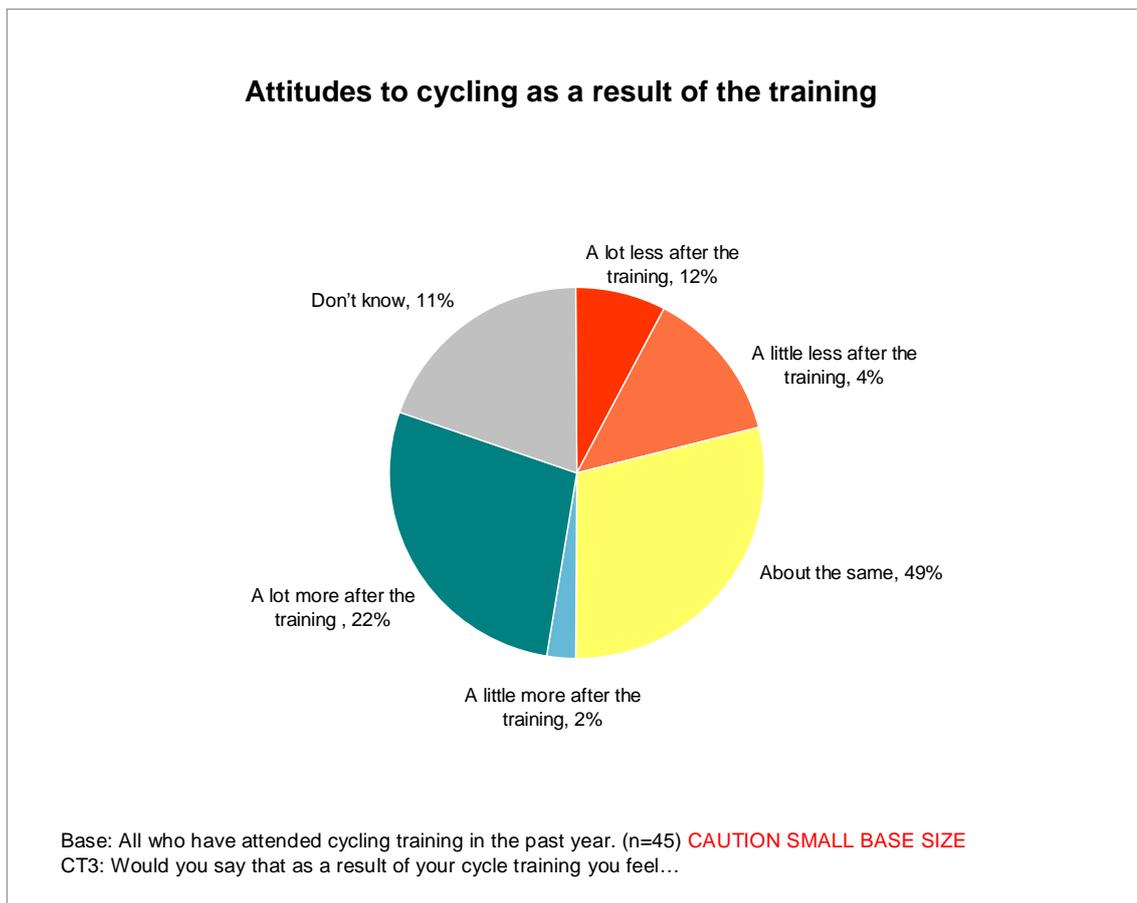


Demographic analysis:

The sample is small and caution must be applied when analyzing these results, but it seems that women were more likely to get a positive effect from the cycle training than men, with a third of women cycling a lot more as a result of the training compared to less than a tenth of men. Other demographics did not seem to have any effect on whether people were cycling more or less as a result of the training.

Attitudes to cycling on London's Roads as a result of the training

Cycling training seemed to have a positive effect on people's attitudes to cycling on roads. As the chart below shows, just under a half of the 45 people who had participated in the training felt either a little more or a lot more confident cycling on London's roads, whilst under one in five people felt a little or a lot less confident doing so.

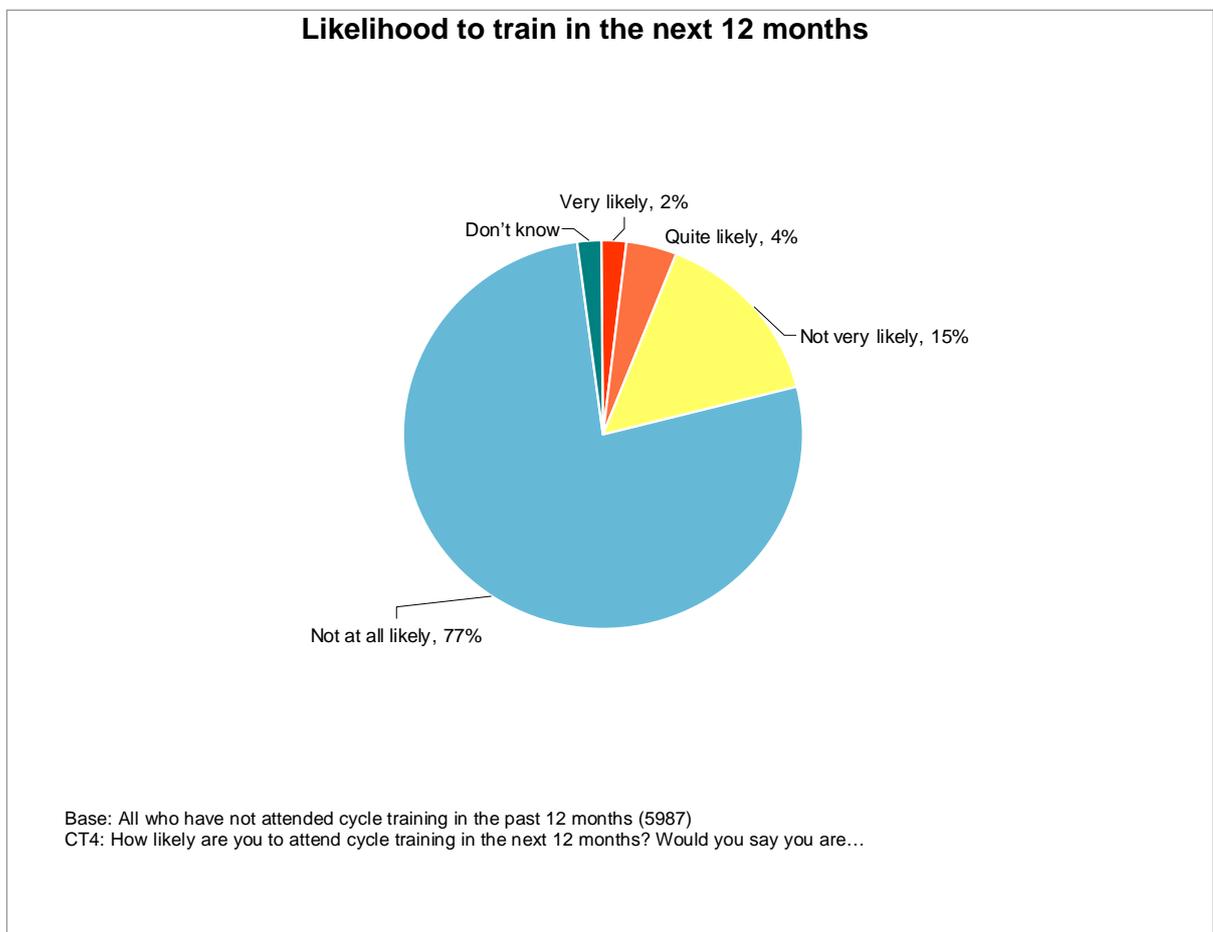


Demographic analysis:

Again the caution with small samples must be applied, yet just under two thirds of women who had participated in the event had more confidence cycling on the roads as a result of participating in the training, compared to a quarter of men who had also participated. So overall it seems that women were more positively affected than men. There were no other demographics that had any real bearing on whether people felt more or less confident cycling on London's roads as a result of recent cycling training.

Likelihood to attend cycling training in the next 12 months

The chart below shows that just over three quarters of Londoners were not **at all** likely to attend a cycling training event in the next 12 months, followed by a further sixth who would not be very likely. Just over one in 20 Londoners told us that they would be likely to attend a cycling event in the next 12 months, with 2% saying they would be very likely to. A note of caution is necessary here though as our annual Attitudes to Cycling research has found that the proportion of people who tell us in a given year that they have had cycle training in the last 12 months is always substantially lower than the proportion who told us the previous year that they thought it likely that they would.



Demographic analysis:

All reported differences are statistically significant.

It is in the younger age groups, 16-24 and 25-34, where we found the highest proportions indicating that they are likely to attend cycle training in the next 12 months (9% saying likely or very likely in both age groups) than those in the older age groups, 45-54, 55-64 and 65+ (6%,3% and 2% respectively). People from BAME groups were more likely than white people (13% vs 3%) to say that it is likely that they will attend cycling training in the next 12 months, as were those in part time work versus those in both full time work and not working (8% vs 6% for both). Londoners who live in Inner London were also more likely to think it likely that they will attend cycling training in the next 12 months than those who live in outer London (with 8% saying likely or very likely vs 5% in Outer London doing so).