

Attitudes towards cycling
Annual report 2013
TfL number: 05110
SPA FT number: 1479

Final report





Introduction

- ➔ The Mayor of London and Transport for London (TfL) have a target to increase cycling from its 2001 level of 2% to 5% by 2026. This equates to a 400% increase compared to 2000 levels
- ➔ “Attitudes towards Cycling” has been conducted since 2005 to assess cycling activity and attitudes among Londoners
- ➔ The results shown here are from the March 2013 survey which comprised 1,373 telephone interviews with adult Londoners. Data are weighted to represent the London population in terms of age, gender, ethnicity, working status and location (inner/outer London)
- ➔ Traditionally 1,000 interviews have been conducted. For the last two years, an additional boost of cyclists was included in order to deliver more robust results for this key group



Reporting note

- Since June 2010 there has been a change in how cyclists and non-cyclists are categorised. All previous data shown here have been amended to reflect this change in definition and therefore slight differences with previous reports will be seen. There is a table showing how the definitions have been changed on the next slide of this report
- Research conducted into cycling is affected by seasonality as the summer months see a greater level of cycling than other seasons. This should be taken into account when interpreting findings
- Throughout this report, data from 2013 are compared with last year's figures. Statistically significant differences with 2012 are shown as follows:

 **Significantly lower than 2012**

 **Significantly higher than 2012**



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

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

Note: the figures from previous waves have been re-calculated in this report meaning that year-on-year comparisons are valid



Summary





Summary

The picture of cycling

- ➔ 18% of Londoners now cycle, and this figure has remained largely unchanged since monitoring began
- ➔ Scope remains for more Londoners to take up cycling:
 - 52% of Londoners have access to a bicycle in their household
 - Almost nine out of ten know how to ride a bike
 - Many could be encouraged to cycle to work if there were more facilities such as cycle racks or showers
- ➔ Both cyclists and non-cyclists say that if they started cycling, or cycled more, these cycling trips would be instead of bus, Tube and car journeys
- ➔ Concerns about safety remains the largest single barrier to increased cycling, followed by poor weather conditions this year



Behaviour that lies behind choosing to cycle

- ➔ TfL has developed a behaviour change model to assess cyclists' and non-cyclists' propensity to increase their level of cycling
- ➔ Current cyclists are most likely to be in the 'sustained change' category, meaning they are already 'cycling more recently and are still doing it either regularly or occasionally'
- ➔ Most non-cyclists are in the 'pre-contemplation' stage, meaning they:
 - 'Have never thought about taking up cycling, but would be unlikely to start in the future'
 - 'Have thought about it but don't intend starting in the future'
 - 'Have never thought about it but could be open to it in the future'
- ➔ 8% of non-cyclists are in the 'lapsed' category, meaning that they 'started cycling, but couldn't stick to it'

Motivators and deterrents

- As in 2012, for both current cyclists and non-cyclists there are similar motivators and barriers to cycling more/taking up cycling
- Increased fitness continues to be the main motivator, with saving time and money also driving interest in (more) cycling. Concern about safety remains the most commonly mentioned deterrent to increasing/taking up cycling
- Around half of cyclists rate as 'poor' or 'very poor' the security of their bike when left unattended, and the safety of cycling
- The availability of cycle racks at the work-place is rated as 'good' or 'very good' by 66% of Londoners, however when considering cycle racks on London's streets, at train/Tube stations or 'near your home', ratings are much lower
- Cycling remains a relatively unappealing mode of transport – 49% of non-cyclists rate the mode as unappealing



Attitudes towards cycling

- ➔ Among both regular and occasional cyclists*, trips within the local area are thought to be more appealing than journeys outside the local area and within central London
 - This is in line with findings from 2012
- ➔ There has been little movement in various attitudes towards cycling since October 2010
 - Many of the attitudes are positive, such as the view that cycling is becoming more popular and that it is a convenient and interesting way to travel
 - However, the perception that cyclists are vulnerable to other road users and that traffic makes people afraid of cycling are still common

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



Barclays Cycle Hire

- ➔ Most Londoners are aware of Barclays Cycle Hire
 - Awareness among cyclists has increased this year, with nearly all aware this year
- ➔ A growing proportion of Londoners have used the scheme – 10% said they have hired a bike in this wave of the research, compared with 7% in 2012
- ➔ There remains evidence that Barclays Cycle Hire has increased users' levels of cycling – 40% of users say the scheme has increased their cycling at least 'a little'
- ➔ BCH trips are most commonly made for leisure purposes, as they were in 2012
- ➔ Two thirds of users are aware of the expansion of Barclays Cycle Hire to the East and South of London
 - A third of current non-users say they would use Barclays Cycle Hire if it were in their local area





Barclays Cycle Superhighways

- ➔ Four Barclays Cycle Superhighways are now in operation to provide routes for cyclists travelling into central London (eight more will be in operation by 2015)
- ➔ Two fifths of Londoners are aware of Barclays Cycle Superhighways, in line with 2012, and 15% of those aware have used one
- ➔ There is relatively low awareness of the forthcoming routes – fewer than half of current users knew about the future planned routes
 - And among those aware of Barclays Cycle Superhighways generally, just 33% were satisfied with their availability (though dissatisfaction is also low)
- ➔ Two thirds of users are satisfied with Barclays Cycle Superhighways overall





Cycling events

- Tour of Britain and Sky Ride remain the most commonly recognised annual cycling events, and awareness has increased for both in 2013
- Two thirds of Londoners watched at least one Olympic/ Paralympic cycling event on television, and 9% attended at least one in person
- 6% of those who watched / attended an Olympic/ Paralympic cycling event said they had cycled more as a result
- Of the athletes covered in the research, Sir Bradley Wiggins was most likely to have inspired Londoners to cycle more





Investment in cycling

Investment in cycling

- As seen in 2012, half of Londoners think that there is about the right level of investment in cycling
- However, a third believe there is too little investment, rising to 55% of cyclists

Greenways

- 45% of Londoners are aware of Greenways (rising to 58% of cyclists)
- 4% of Londoners (and 16% of cyclists) have cycled on a Greenway



Cycle crime

- ➔ Perceptions of safety from crime and anti-social behaviour have regained their upward trend, following a dip in 2012
 - However, around half of cyclists say they change their route when cycling after dark, and this remains the time when feelings of safety are lowest
- ➔ As in 2012, most agree that there is a lot of cycle crime in London, and almost half say this puts them off cycling
- ➔ A quarter of regular cyclists have had a bike stolen in the last couple of years
 - Many have experienced more than one bike theft, though only around half are reported to the police
- ➔ Most of those who have experienced cycle theft have reduced the amount they cycle; 16% have stopped cycling altogether



Profile of cyclists





Profile of cyclists by frequency of cycling

- ➔ 18% of Londoners cycle*; this figure is not significantly different from any previous wave of this research
- ➔ Of those who do cycle, 65% do so regularly (at least once a week), while 35% are occasional cyclists (less often)
 - The proportion of cyclists identifying themselves as regular cyclists is in line with trend data
- ➔ Around a fifth of cyclists (21%) use their bike at least five days a week, with two thirds (65%) claiming to cycle at least once a week
- ➔ There has been very little change in the frequency with which both regular and occasional cyclists report using their bicycles

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



Potential for increasing cycling

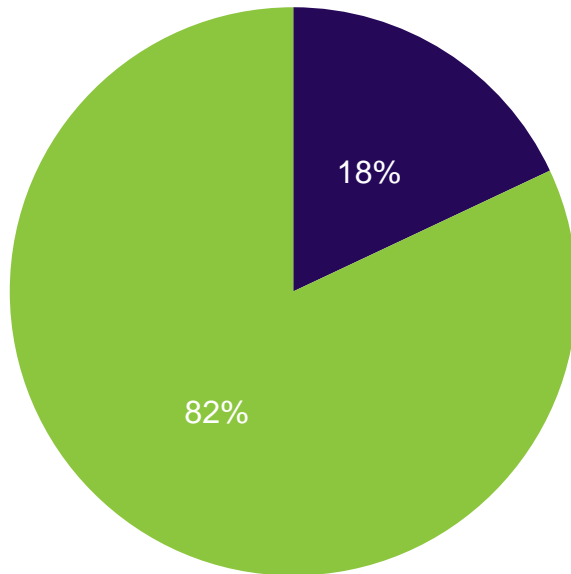
- ➔ There remains considerable scope for increasing the incidence of cycling
 - Half of Londoners have access to a bike in their household, and 87% know how to ride one
 - Younger Londoners, those in employment and non-disabled are more likely than other groups both to own and to know how to ride a bike
- ➔ 9% of Londoners commute by bicycle at present, in line with the proportion seen in 2012
 - 78% of these commute by bike at least once a week
- ➔ More than half (56%) of commuters report that their workplace has cycle parking facilities; other specific cyclist facilities are less common
 - Two in five (43%) say that they would be encouraged to cycle to work if there were (more) cycling facilities available



18% of Londoners cycle with two thirds (65%) of these cycling at least once a week

Cyclists and non-cyclists

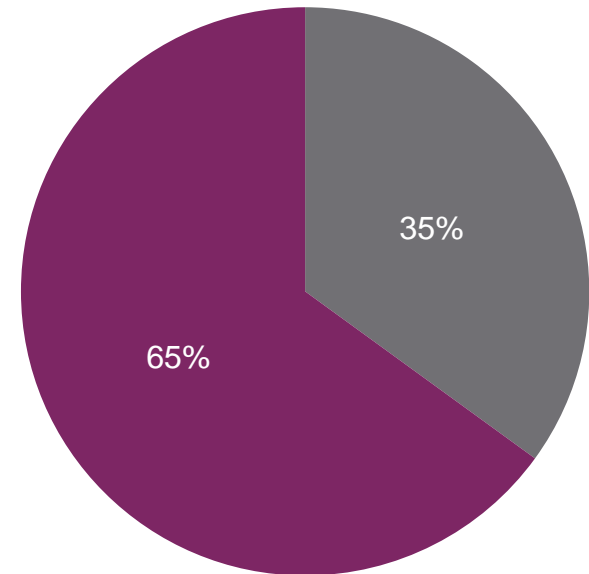
■ Cyclist ■ Non-cyclist



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

Breakdown of regular and occasional cyclists

■ Occasional cyclist ■ Regular cyclist



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

QFREQ: Which of these modes of transport do you ever use to get around London? Base: all (1,373)

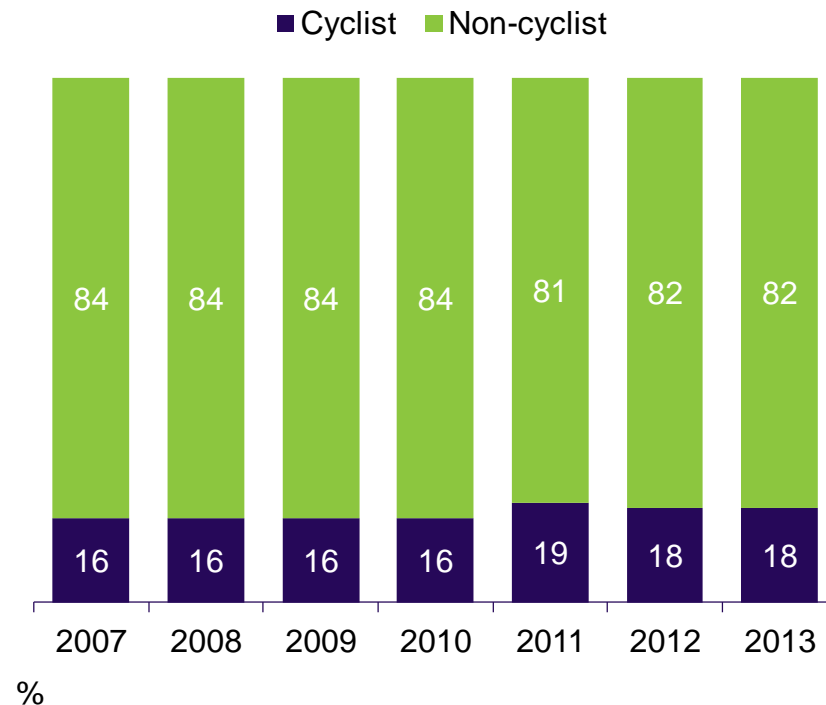
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London? Base: All cyclists (532)



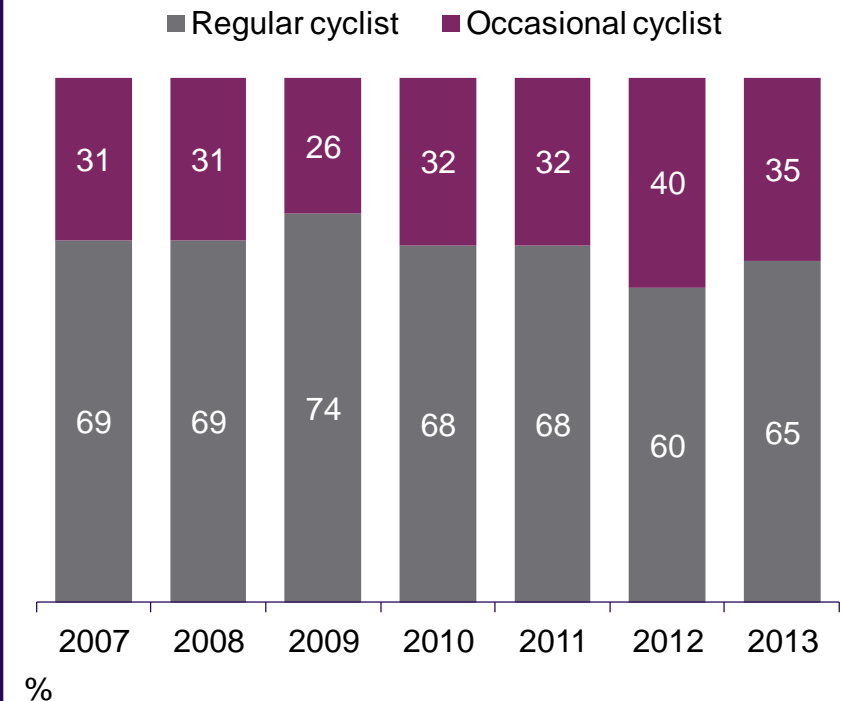
The level of cycling is the same now as this time last year; the proportion of cyclists who do so 'regularly' is in line with trend data

Profile of cycling over time

Cyclists and non-cyclists



Breakdown of regular and occasional cyclists



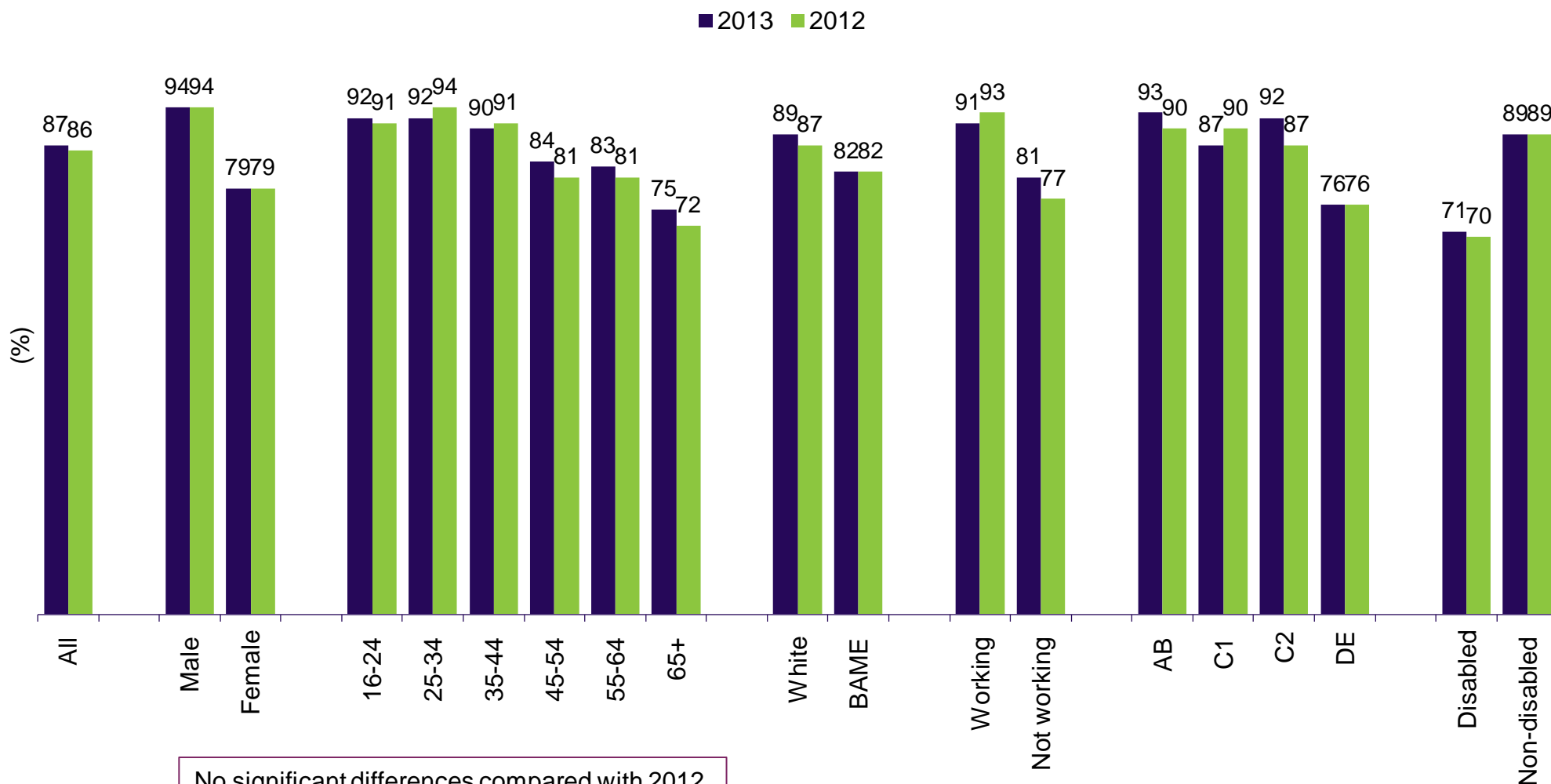
No significant differences compared with 2012

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



87% of Londoners can ride a bike, this is particularly high among men, and those aged up to 44

Percentage able to ride a bike



QBIKE1: Can you ride a bicycle?

Base: All respondents

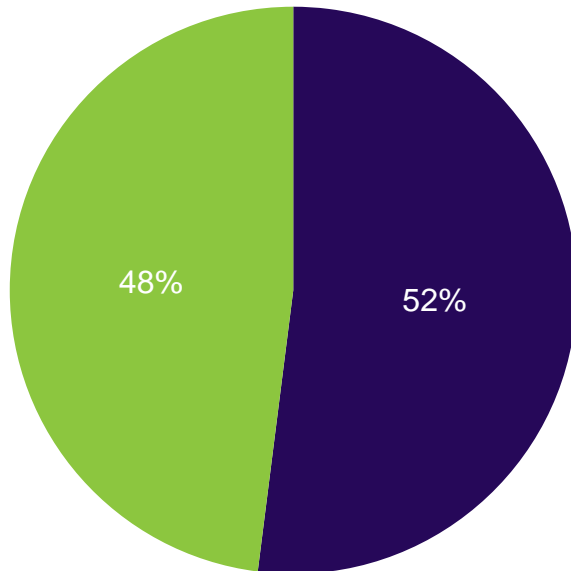


Over half (52%) of Londoners have household access to a bike; of those who do, 22% say they use it

Access to and ownership of a bike in the household

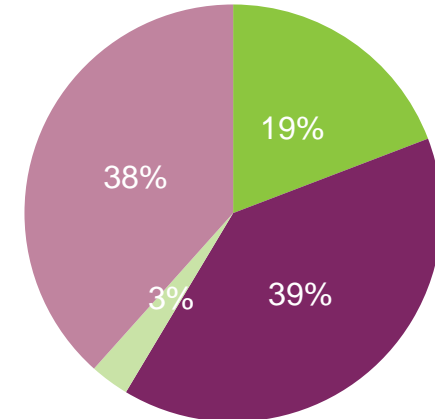
Access to a bike in the household

■ Yes ■ No



Ownership / use of the bike

■ It's my bike and I use it
■ It's my bike but I don't use it
■ It's someone else's bike which I use
■ It's someone else's bike which I don't use



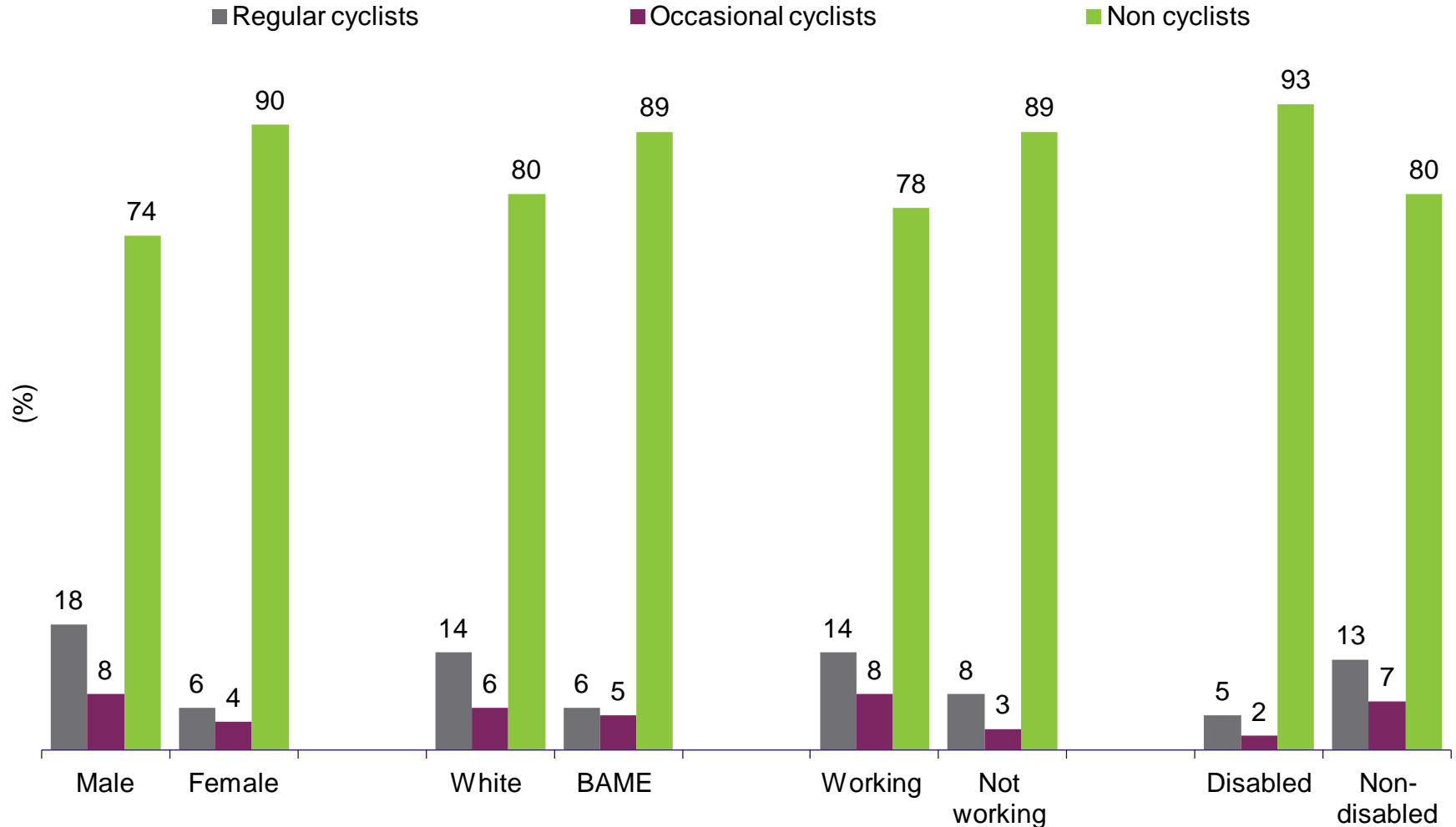
QACCESS1: Does your household have access to a bicycle, even if you don't currently use it? Base: all (1,373)

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



Regular cyclists are more likely to be male, white, in work and non-disabled – in line with 2012

Profile of cyclists



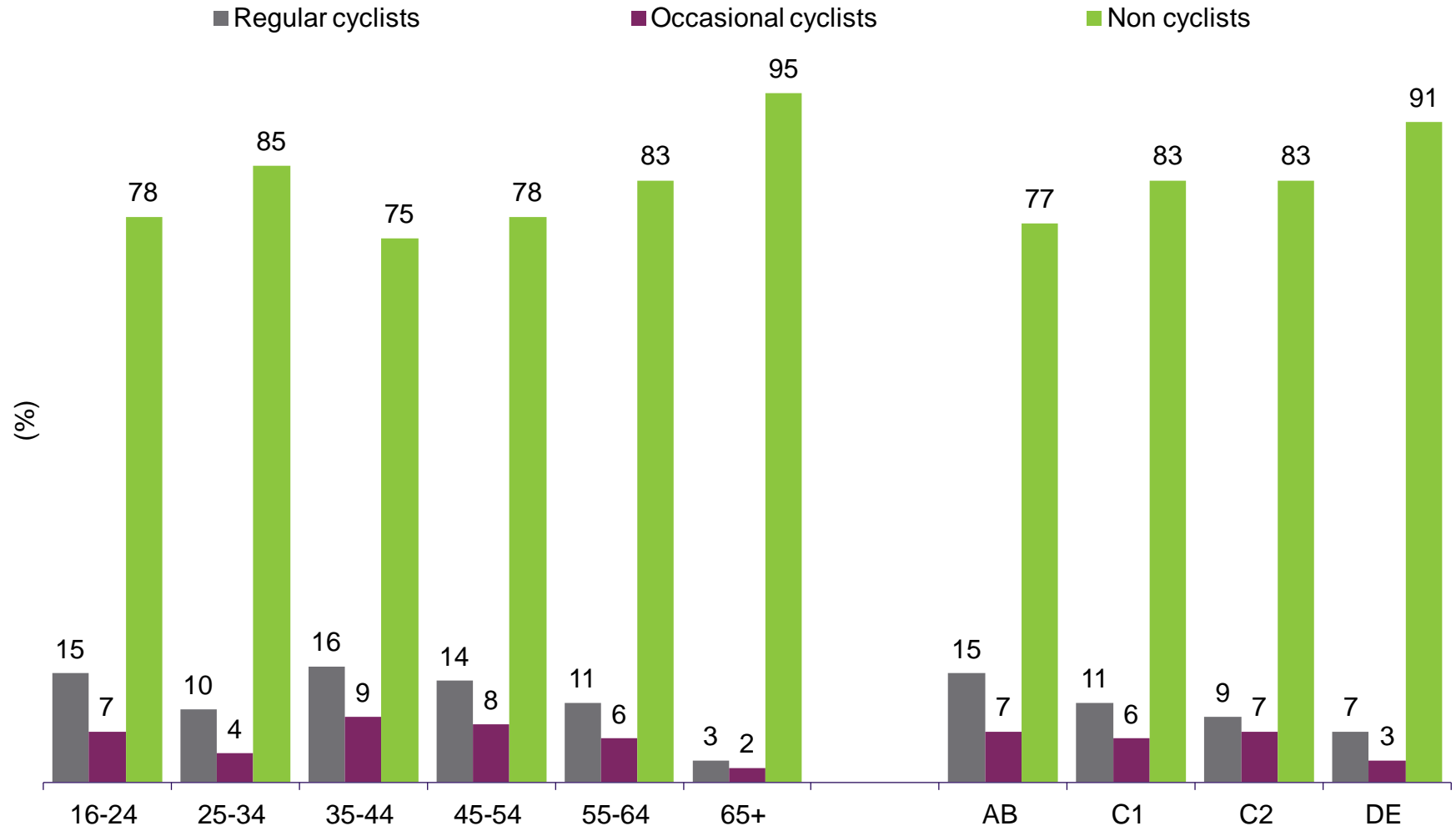
Demographic questions

Base: All – Regular cyclists (329), Occasional cyclists (203), Non-cyclists: (841)



Cyclists tend to be younger, and live in ABC1 households – findings consistent with 2012

Profile of cyclists



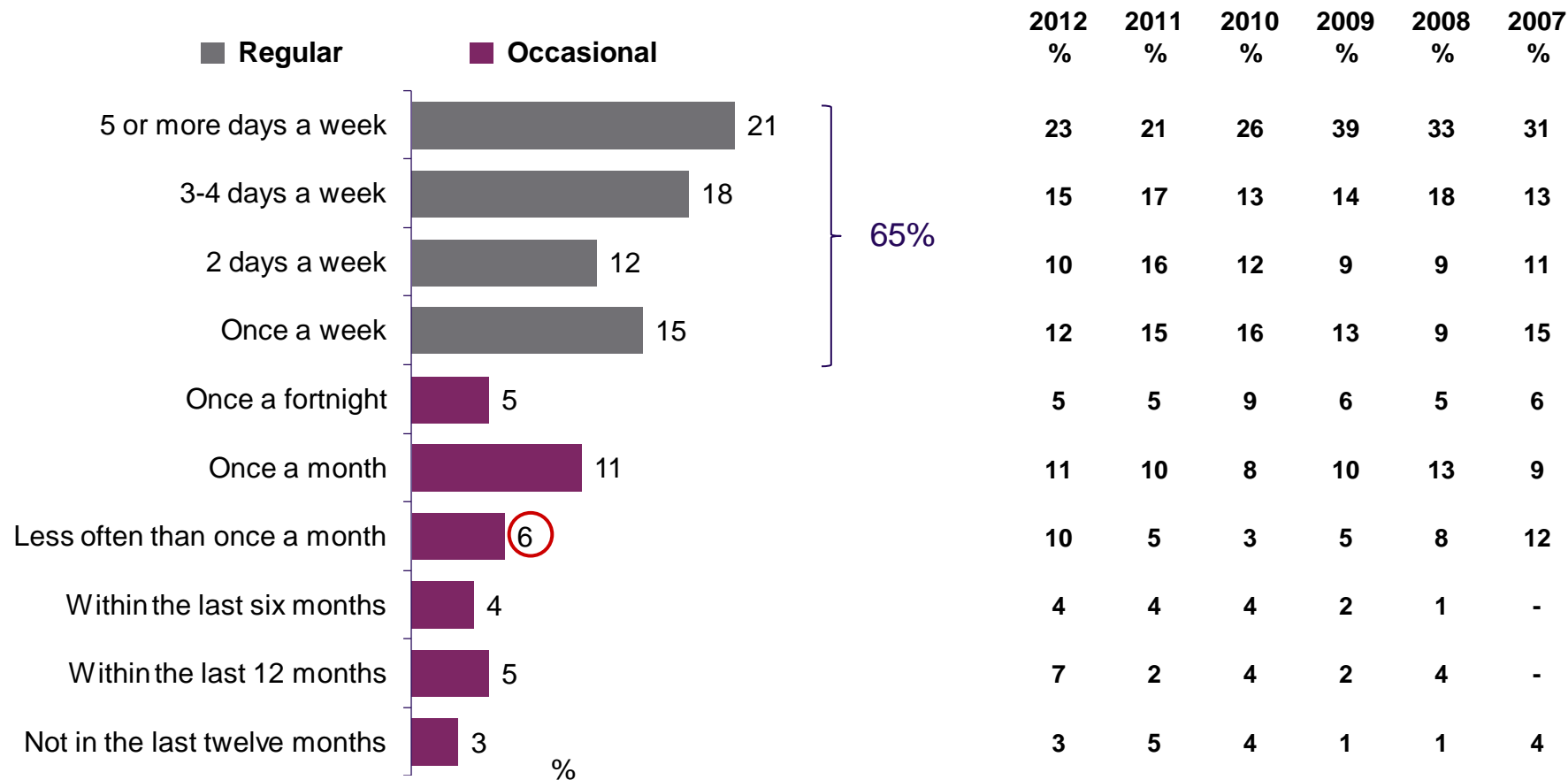
Demographic questions

Base: All – Regular cyclists (329), Occasional cyclists (203), Non-cyclists: (841)



Among all cyclists, a fifth (21%) cycle five or more days a week and two thirds (65%) cycle at least weekly

Frequency of cycling among cyclists



 Significantly lower than 2012

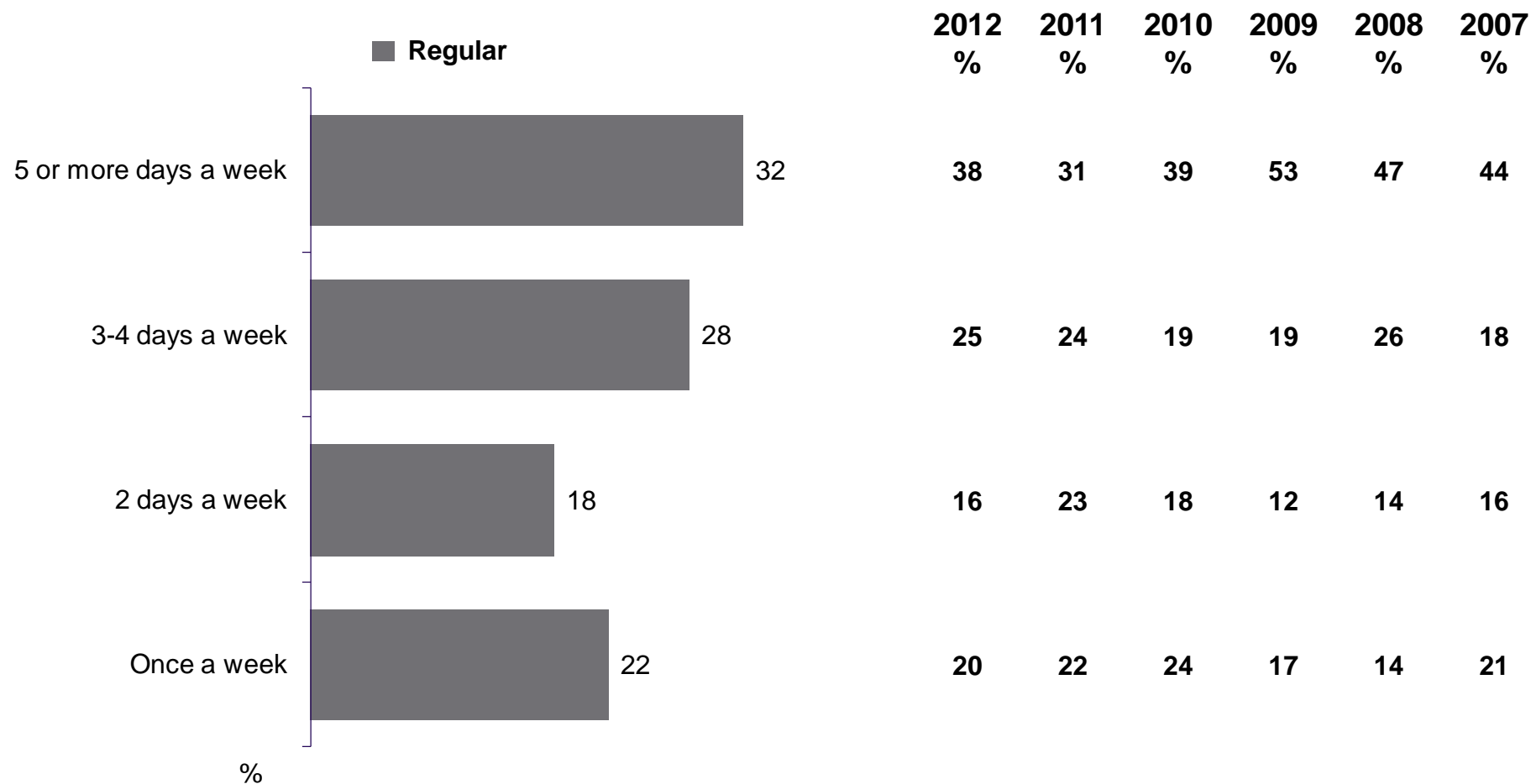
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

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



A third of regular cyclists cycle at least five days a week; this pattern is consistent with 2012

Frequency of cycling among regular cyclists (trend)



No significant differences compared with 2012

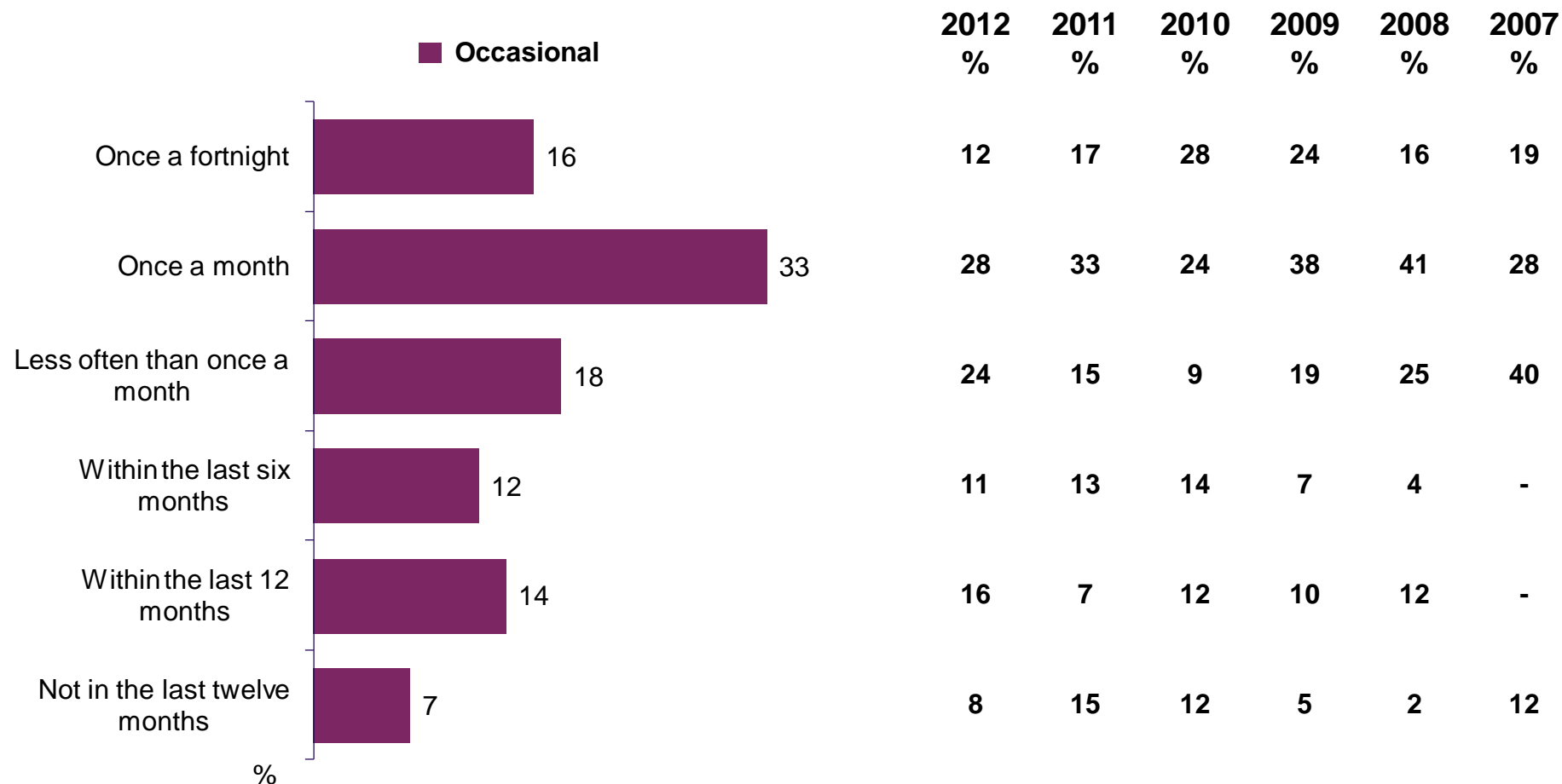
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

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



Almost half (49%) of occasional cyclists use their bikes at least once a month, up slightly from 2012

Frequency of cycling among occasional cyclists (trend)



No significant differences compared with 2012

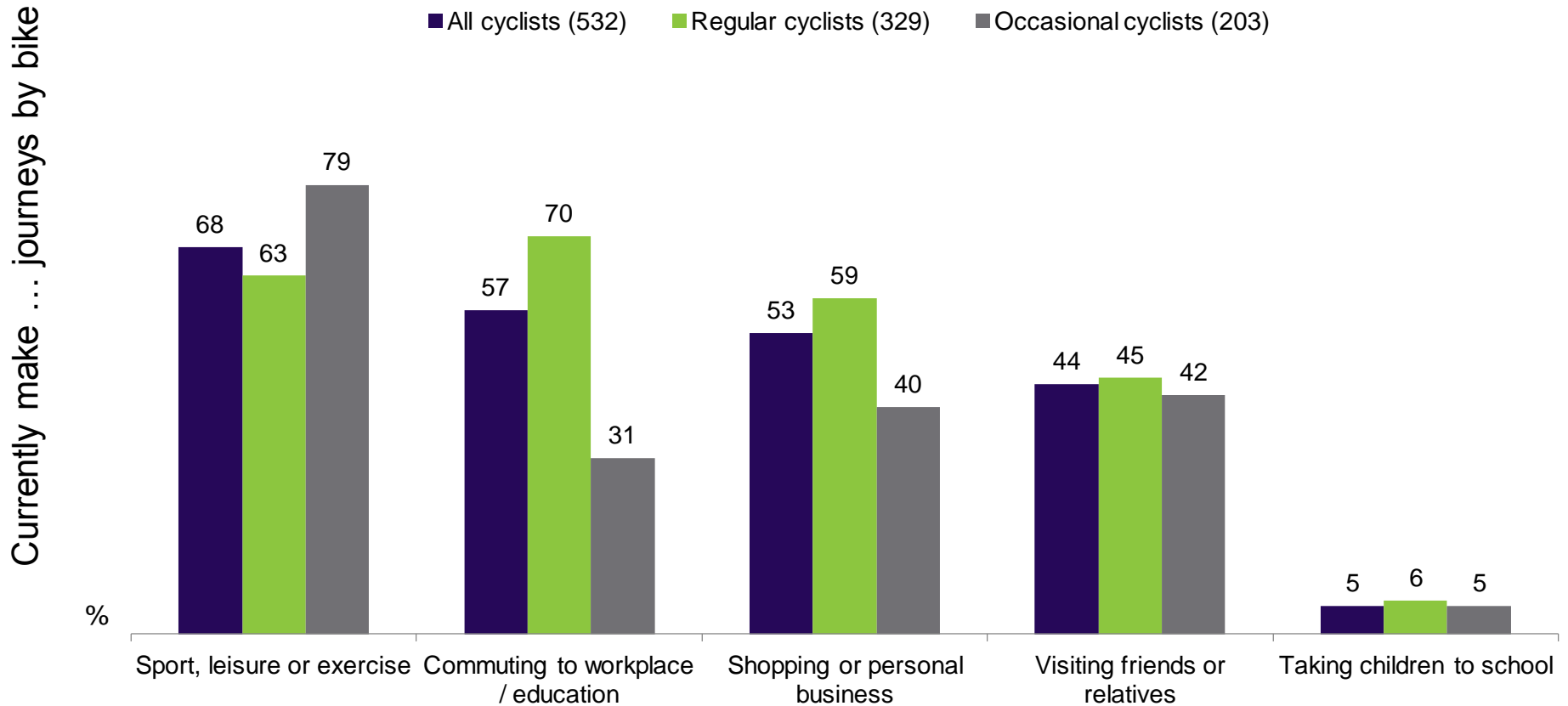
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

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



Most cyclists use a bike for sport, leisure or exercise; regular cyclists are more likely than occasional cyclists to commute or go shopping by bike

Cycling for different journey purposes



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

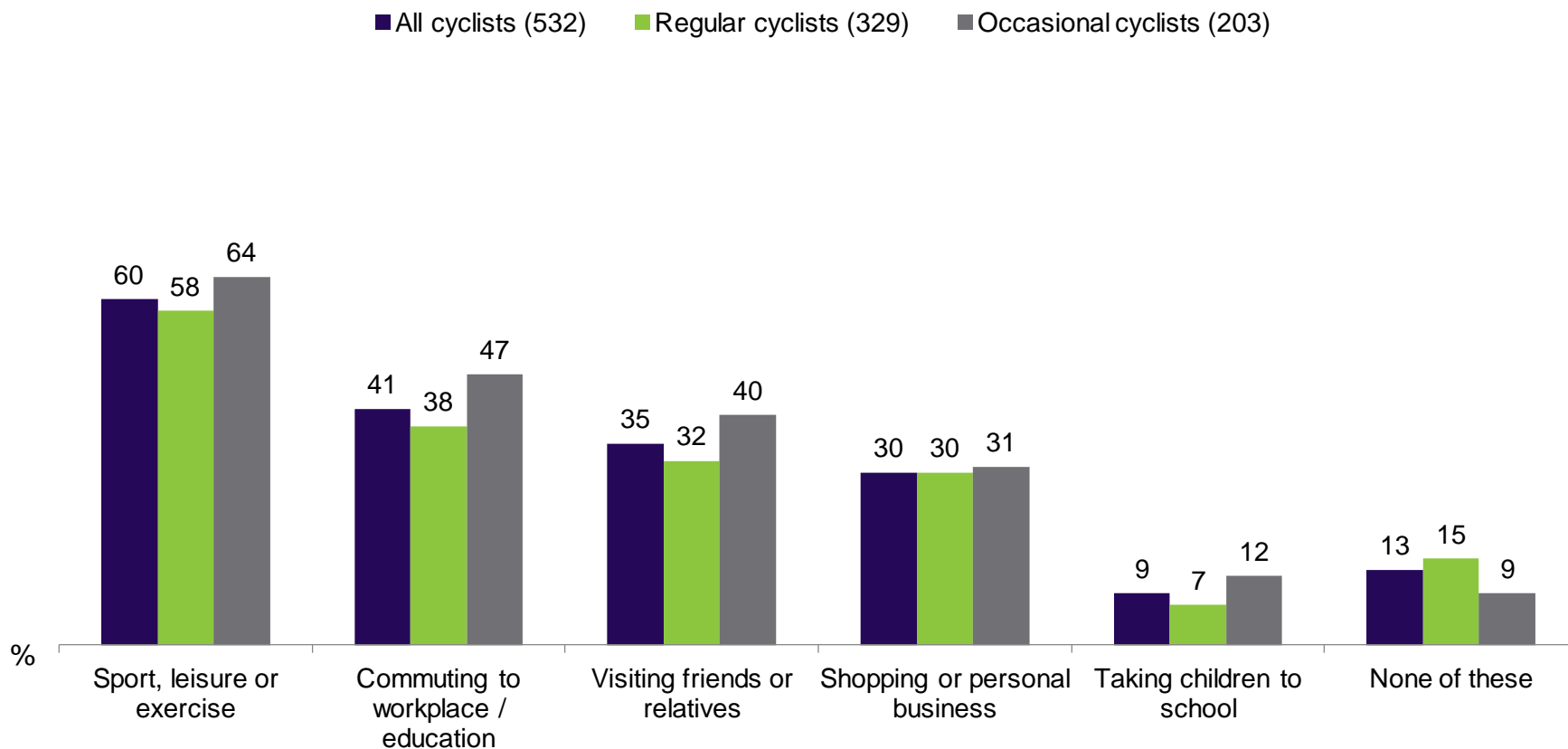
Base: All cyclists (532)



Most cyclists would like to use their bicycles more – particularly for sport, leisure or exercise

Desire to cycle for different journey purposes

Would like to make more ... journeys by bike



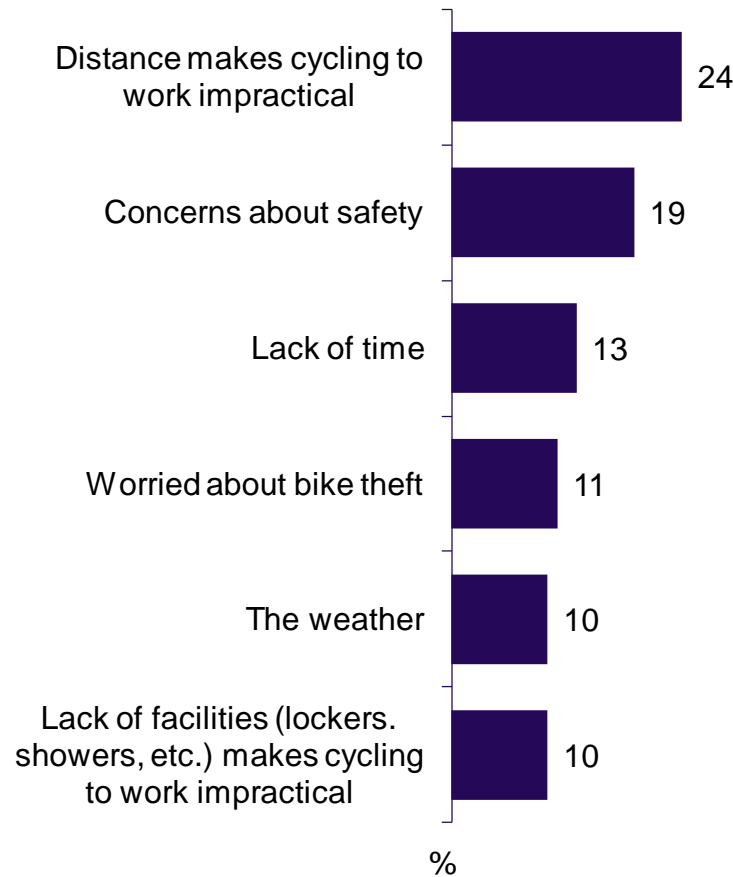
F1a: Which types of journey would you like to make more of by bicycle?

Base: All cyclists (532)



Commuting distance is the biggest barrier to making cycling trips other than for sport, leisure or exercise

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



Mentions above 9% shown

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

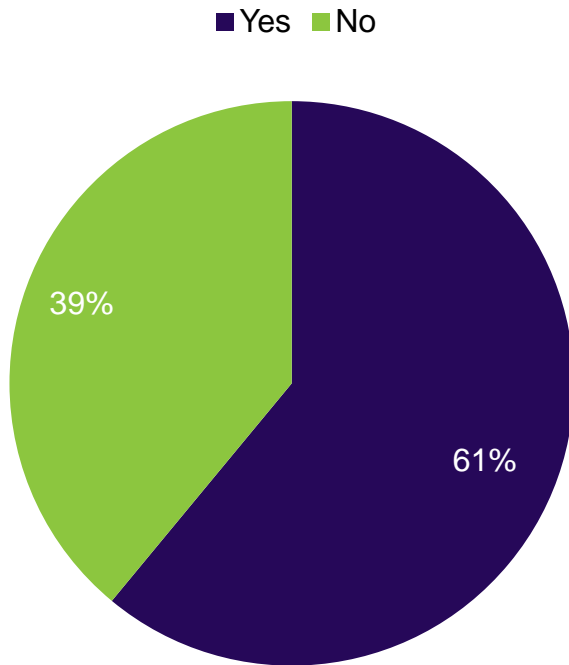
Base: All cyclists who only cycle for sport, leisure or exercise (72)



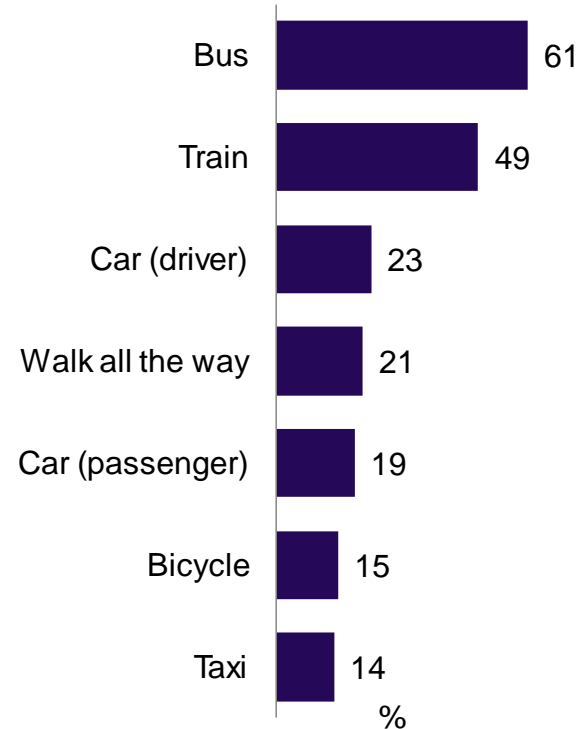
Three in five commute in London. Most commuters take the bus (61%) or train (49%), while 15% cycle

Commuting in London and modes used

Commuting in London



Modes of transport for commuting



Mentions above 13% shown

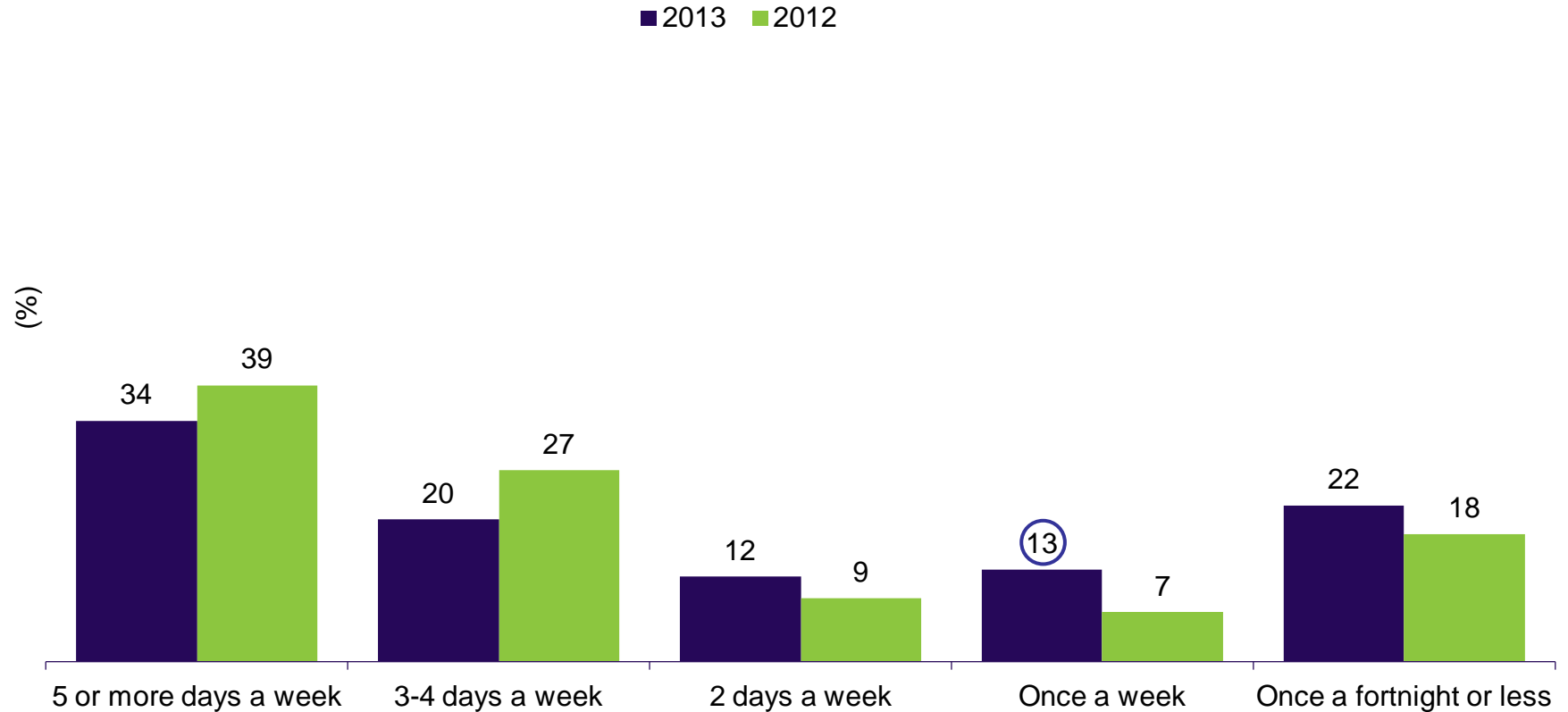
G1: Do you ever commute in London, by which I mean travelling to work, school, college or university? All (1,373)

G2: Which types of transport do you use to commute in London? All who commute (817)



Of those commuting by bike, over half (54%) do so at least three days a week

Frequency of commuting by bike



○ Significantly higher than 2012

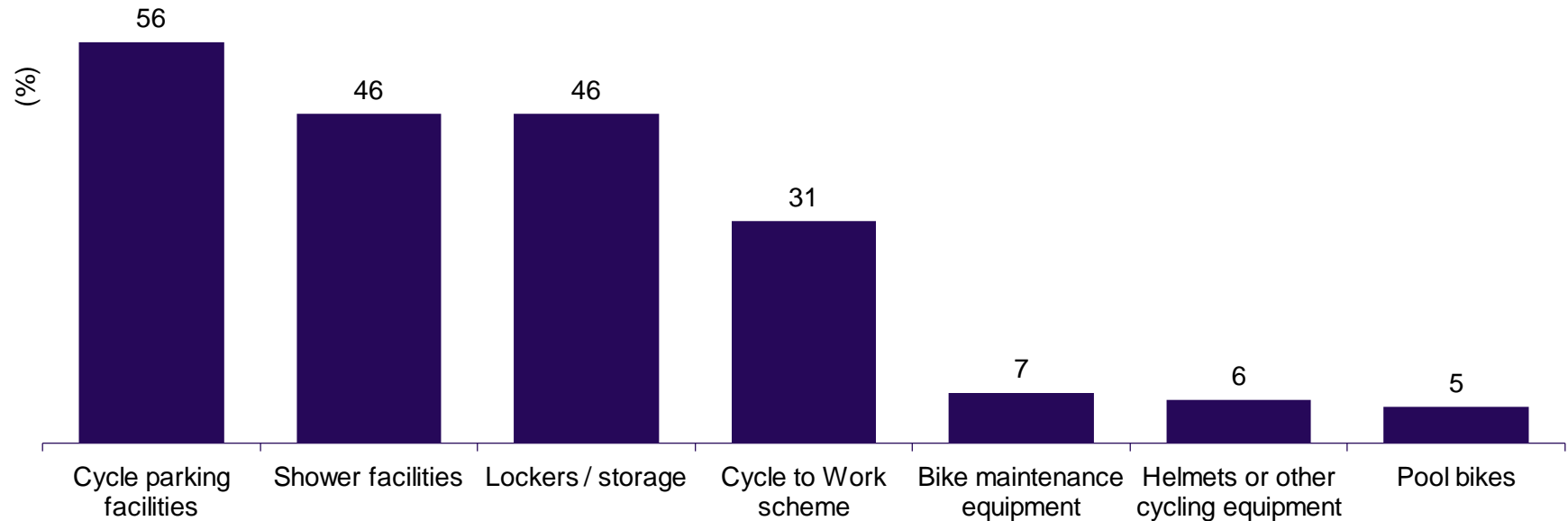
G3: Typically, how often do you cycle as a means of commuting in London?

Base: Those commuting by bike, 2013 (234), 2012 (165)



Most commuters report that their workplace has cycle parking facilities; other cyclist facilities are less common

Cycling facilities at work



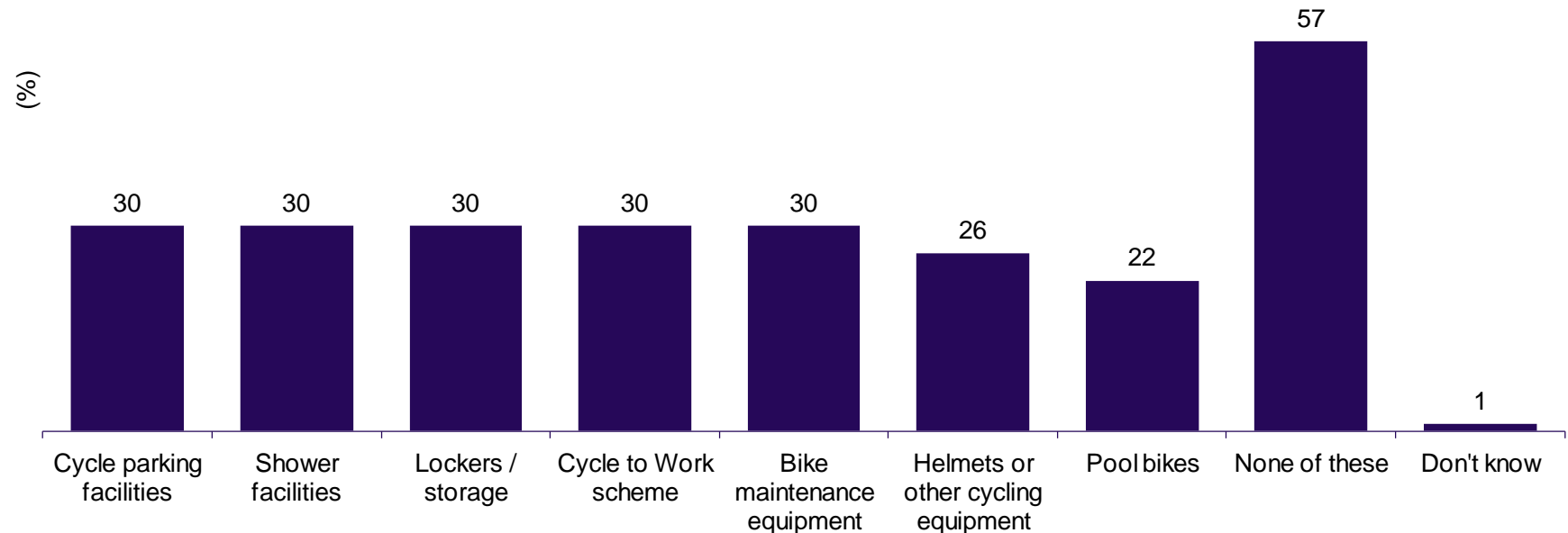
G5: Does your employer/place of education provide any of the following...?

Base: Those who commute (817)



Although most commuters say that increased cycling facilities at work would not encourage them to commute by bike, there is evidence that some could be persuaded by facilities such as cycle parking, showers or lockers

Cycling facilities that would encourage cycling



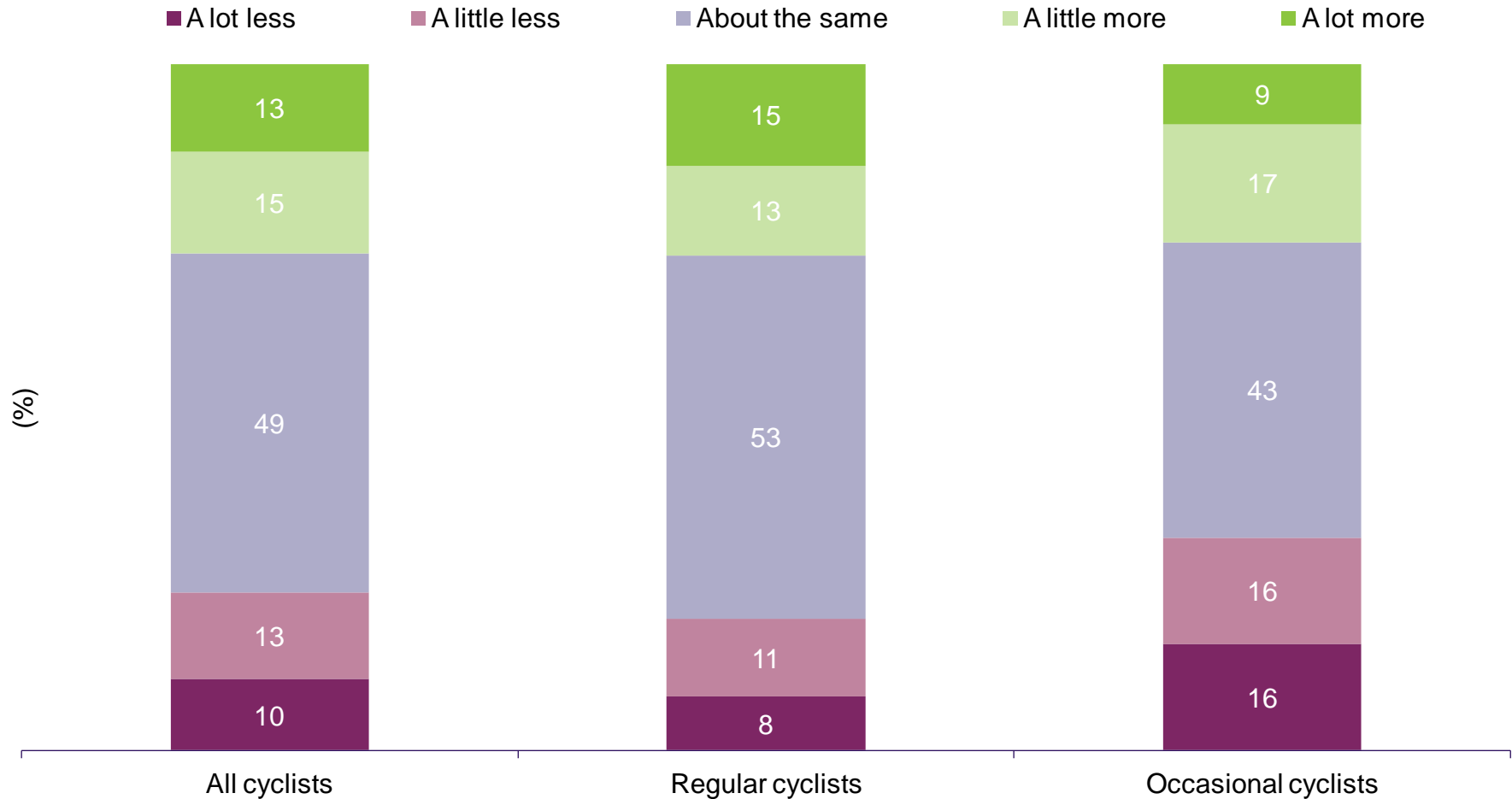
G6: Would it encourage you to cycle to work more if your employer/ place of education offered more facilities for cyclists ?

Base: Those who commute (817)



Half of cyclists have not changed the amount they cycle compared with last year; the remainder divide almost equally between those cycling more and less than a year ago

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 (532)

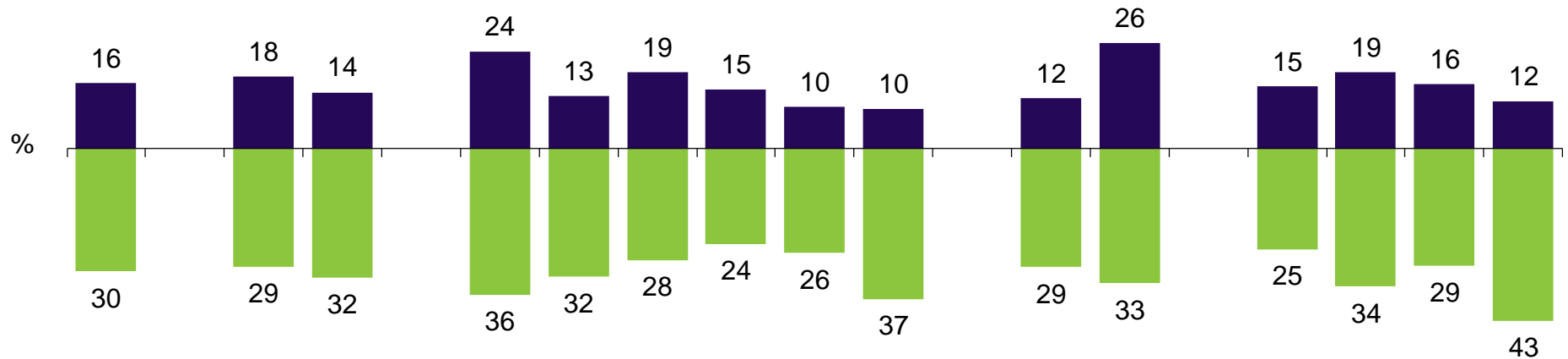


The greatest increases in cycling are seen among 16-24 year olds and BAME Londoners

Frequency of travelling by bike compared with last year

■ Cycle more this year

■ Cycle less this year



Total

Men Women

16-24

25-34

35-44

45-54

55-64

65+

White BAME

AB

C1

C2

DE

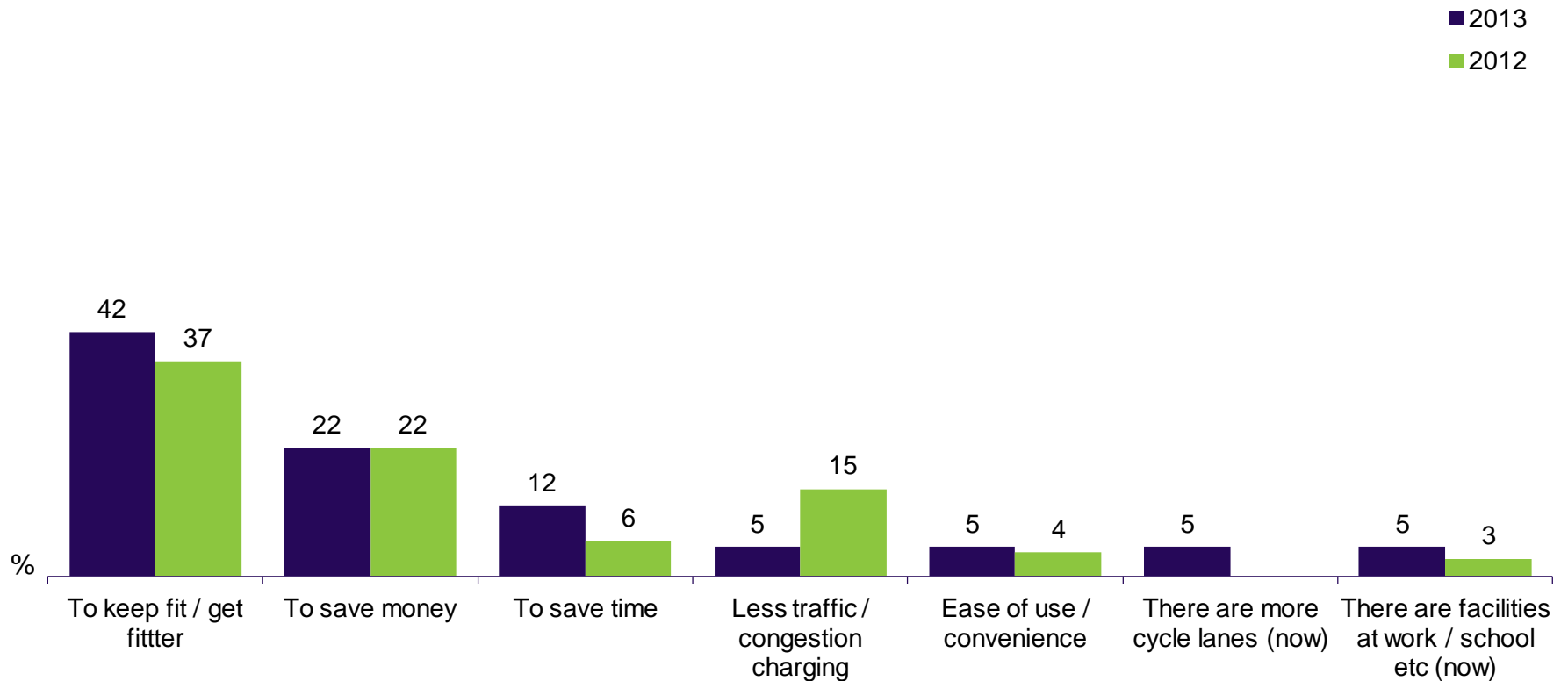
D1. How do you think the amount you cycle in London is compared to this time last year? Would you say you now cycle...?

Base: All excluding those who did not cycle this year or last



Around two fifths of those cycling more are doing so to keep fit or get fitter and a fifth are cycling more to save money

Reasons for cycling more



Mentions above 4% shown

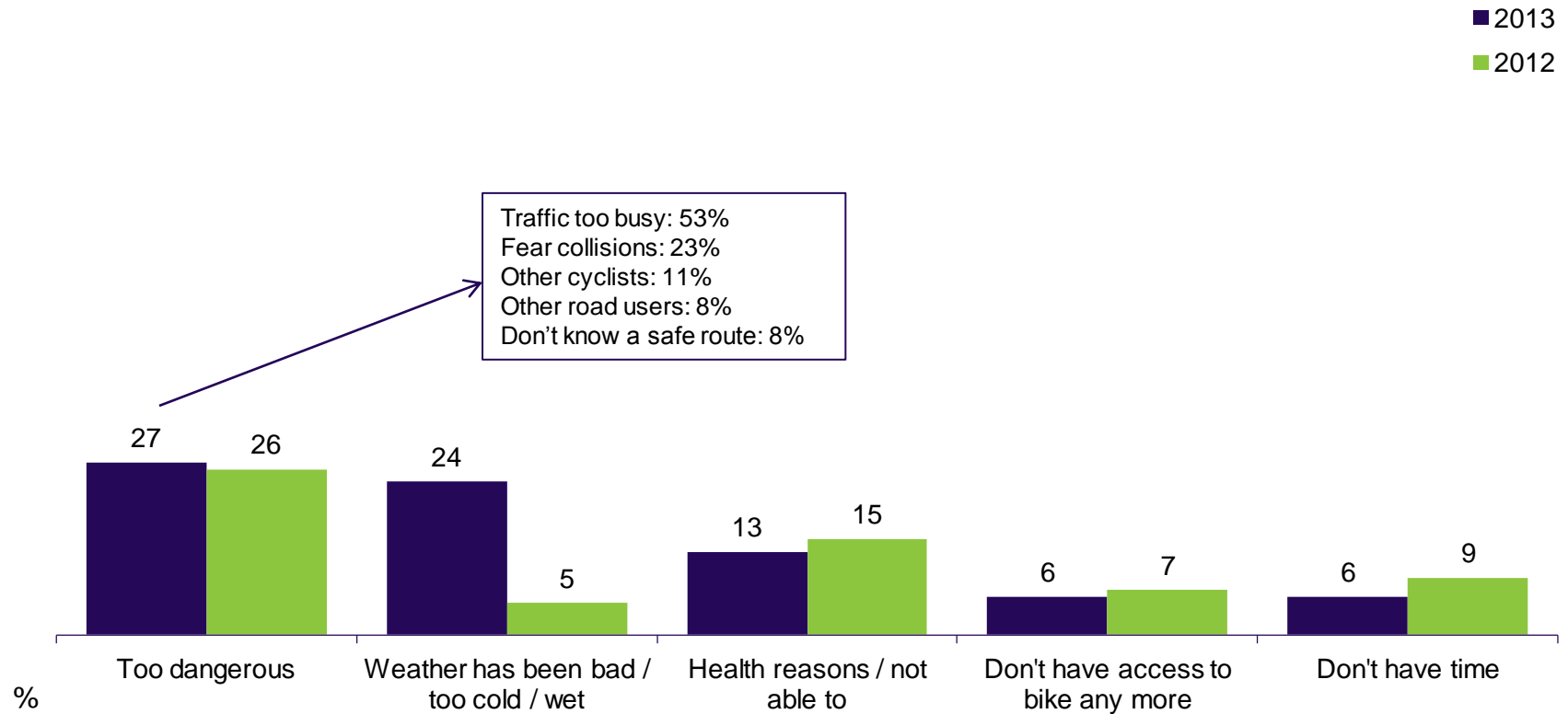
D2. Why have you started cycling more this year?

Base: all cycling more (2013: 168; 2012: 143)



Concerns about safety are most likely to reduce the amount that people cycle, with many believing there is too much traffic for safe cycling

Reasons for cycling less



Mentions above 5% shown

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

Base: All making fewer trips 2013 (240), 2012 (202)



Children's cycling





Profile of cyclists by frequency of cycling

- ➔ Of those Londoners who live in a household with at least one child, two thirds (65%) say that the child / children own a bike
- ➔ However, of these, only 14% regularly cycle to school
 - Of those who do cycle to school, over half are aged between 8 and 11 years old
- ➔ Of those who do not cycle to school, the most common reasons are:
 - Safety concerns (24%)
 - Child is too young (20%)
 - They live too close for it to be worthwhile (19%)

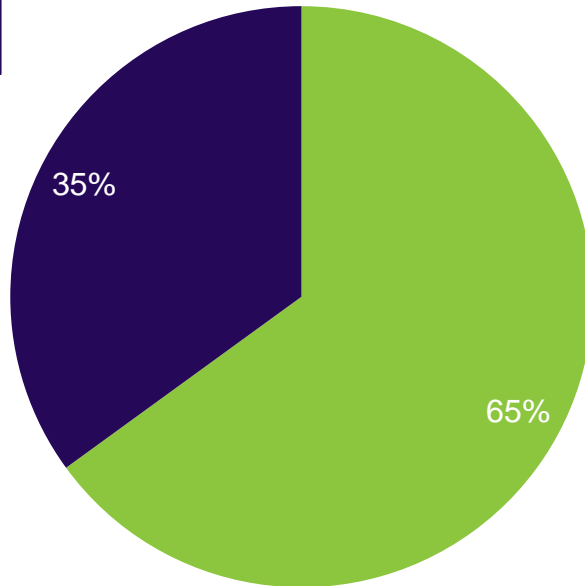


In most households where there is a child, the child(ren) own a bike; only a minority use them regularly to get to school

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

Whether child owns a bike

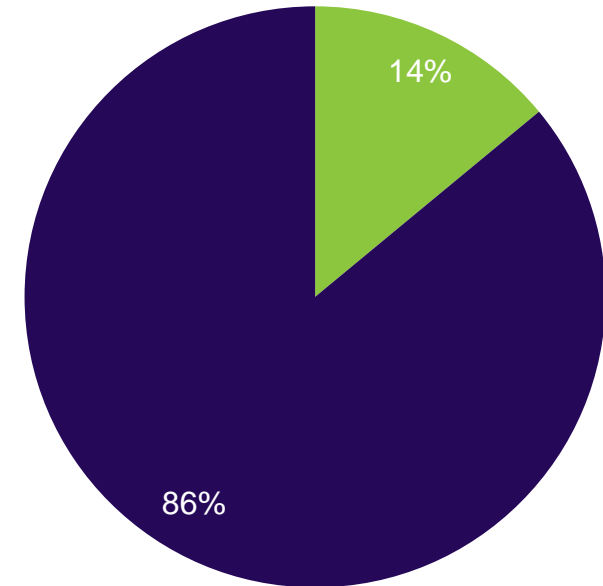
■ Yes ■ No



32% of all respondents have at least one child under the age of 16 living in their household

Whether child cycles to school regularly

■ Yes ■ No



How many children cycle to school regularly? (Base: 40)
One: 76%
Two: 23%
Four or more: 1%

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

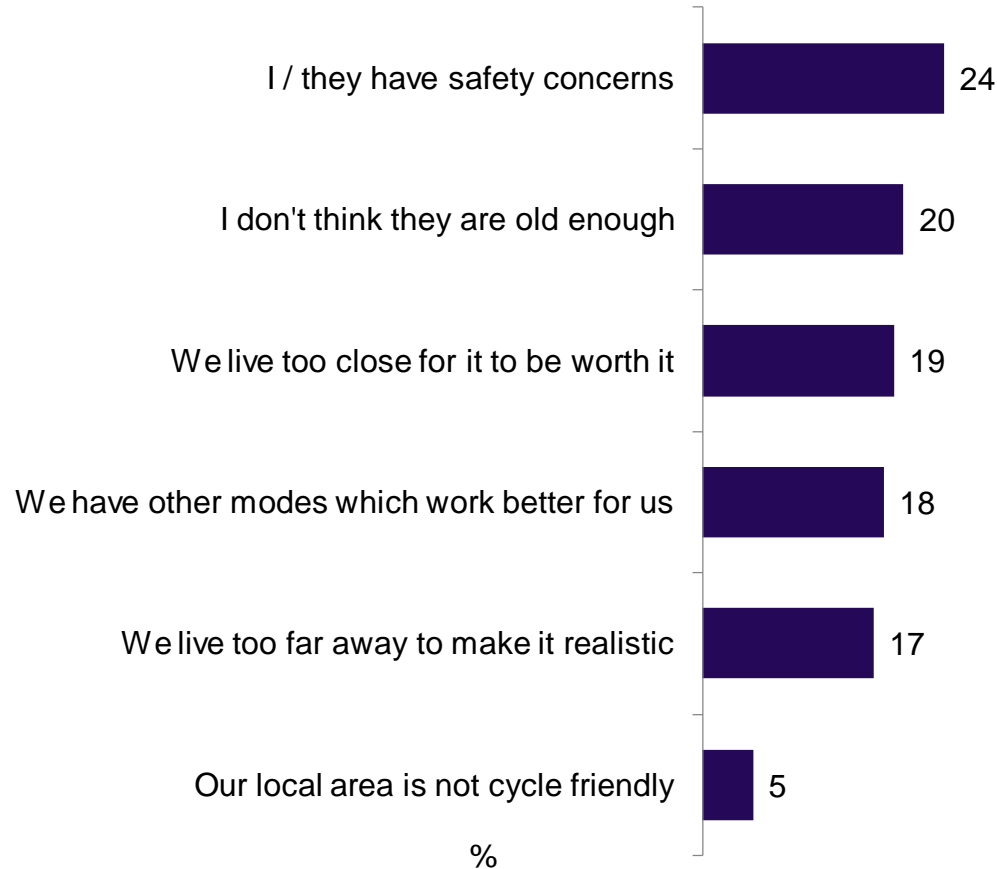
G8: Does your child/children own a bike? Base: all with children (377)

G9: Do any of the children in your household cycle to school regularly (at least once a week)? Base: all with children (273)



Londoners give a variety of reasons why their child does not cycle to school regularly; but the top mention is safety concerns

Reasons why child does not regularly cycle to school



Mentions over 3% shown

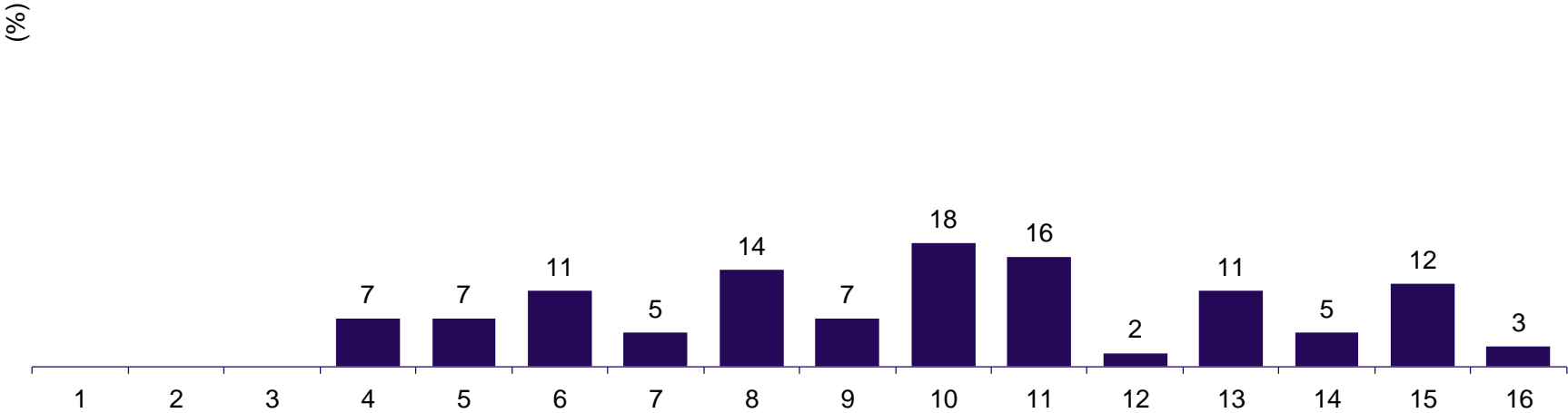
G11: Why doesn't your child/don't your children cycle to school?

Base: All whose children own a bike but do not cycle to school regularly (233)



Over half (55%) of those who ride a bike to school regularly are aged 8-11

Age of child who rides a bike to get to school



G10: How old is your child/are your children who cycle to school at least once a week?
Base: All with a child who rides to school regularly (40)



Cycling history





Cycling history

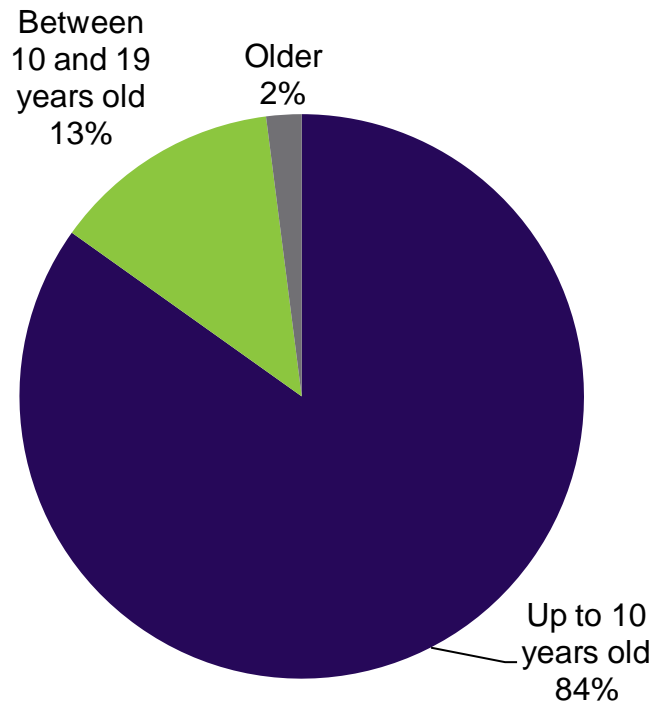
- ➔ As seen in 2012, almost all Londoners (84%) who can ride a bicycle learned to do so by the age of 10, and only 2% learned after their teenage years
 - Most were taught by their parents (69%)
- ➔ Most people have a break from cycling, often lasting more than a year
 - The most common reasons for having a break from cycling involve a perceived lack of need, learning to drive, or being too far away from work to commute by bike
- ➔ When they come back to cycling, it is usually out of a desire to get fit or save money (again, these findings are in line with research carried out in 2012)
- ➔ When they return to cycling, most don't do anything special to get back into it
 - Among those that do, practising on quiet or familiar roads or taking cycle training are the most common activities
- ➔ Two thirds (65%) of those with access to a bike say that they maintain it (rising to 91% of cyclists)
 - Most (64%) maintain the bike themselves, but a third use a local bike shop, and 12% say they take their bike to a high-street chain



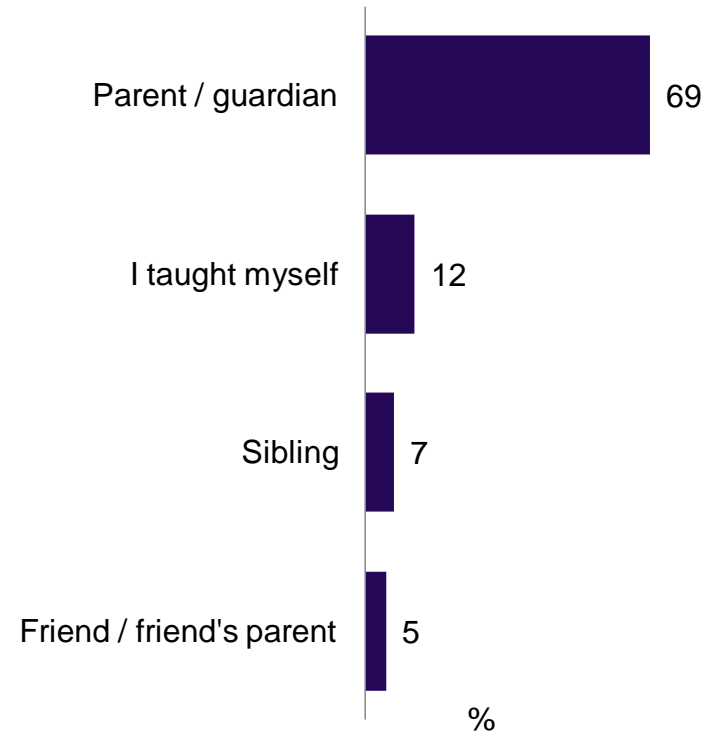
Most people learn to ride a bike when very young, and are taught by their parents, this is in line with 2012

Age of learning to ride a bike, and who was the teacher

At what age learned to ride a bike



Who taught you to ride a bike



Mentions above 4% shown

QC1: How old were you when you learned to ride a bike? Base: all who can ride a bike, exc. 'Don't know'

QC2: Who taught you to ride a bike? Base: all who can ride a bike (1,208)

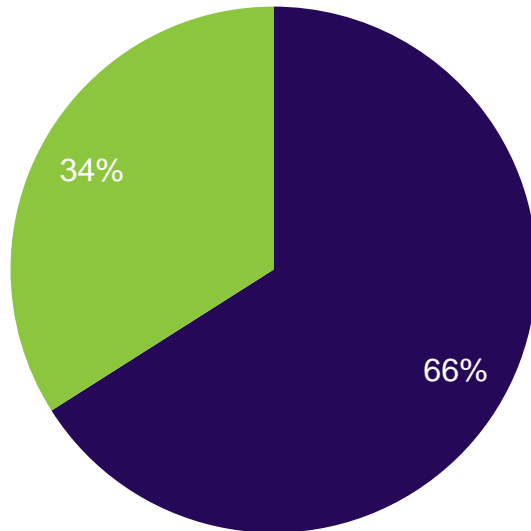


Most people have a break from cycling at some point for more than a year, this is consistent with last year

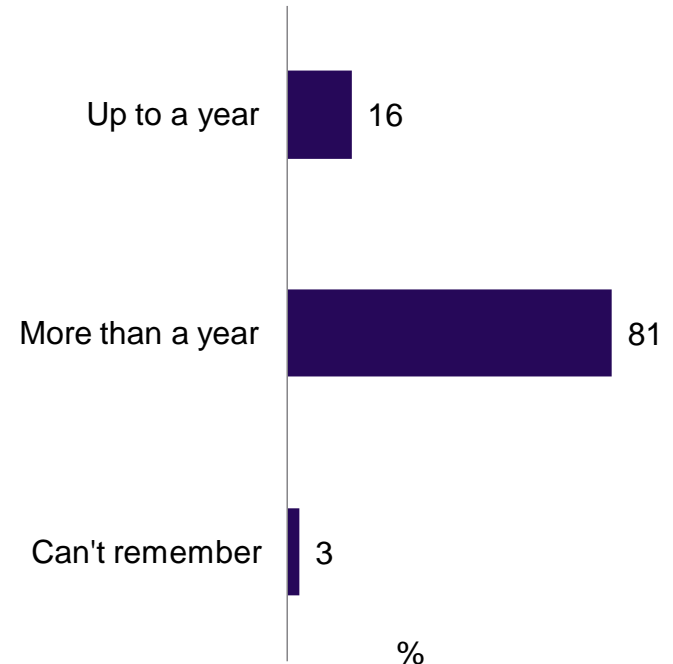
Taking a break from cycling

Whether cycled continuously or had a break from cycling

- Had period when took a break from cycling
- Cycled continuously



Length of time took before start cycling again

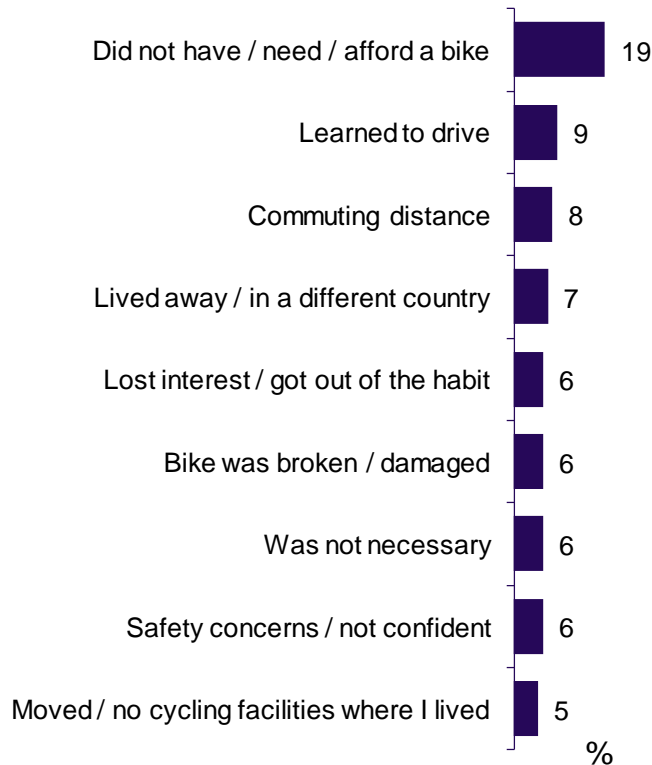




As in 2012, the most common reason for stopping cycling is a lack of need. Conversely, the desire to get fit and/or save money are the most common reasons to motivate people to start again

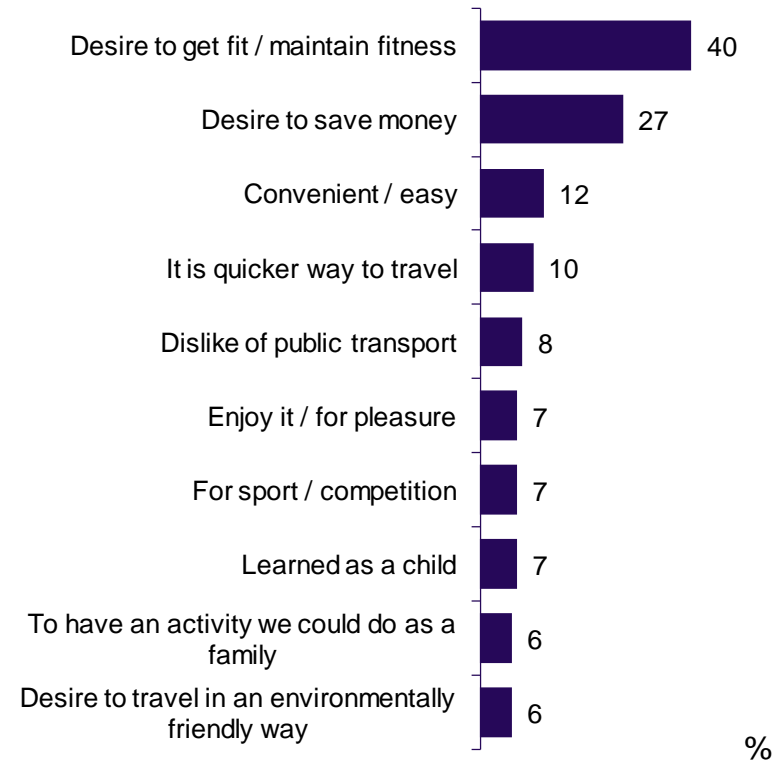
Getting back in to cycling

Reasons for taking a break from cycling



Mentions over 4% shown

Reasons to start cycling (again)



Mentions over 5% shown

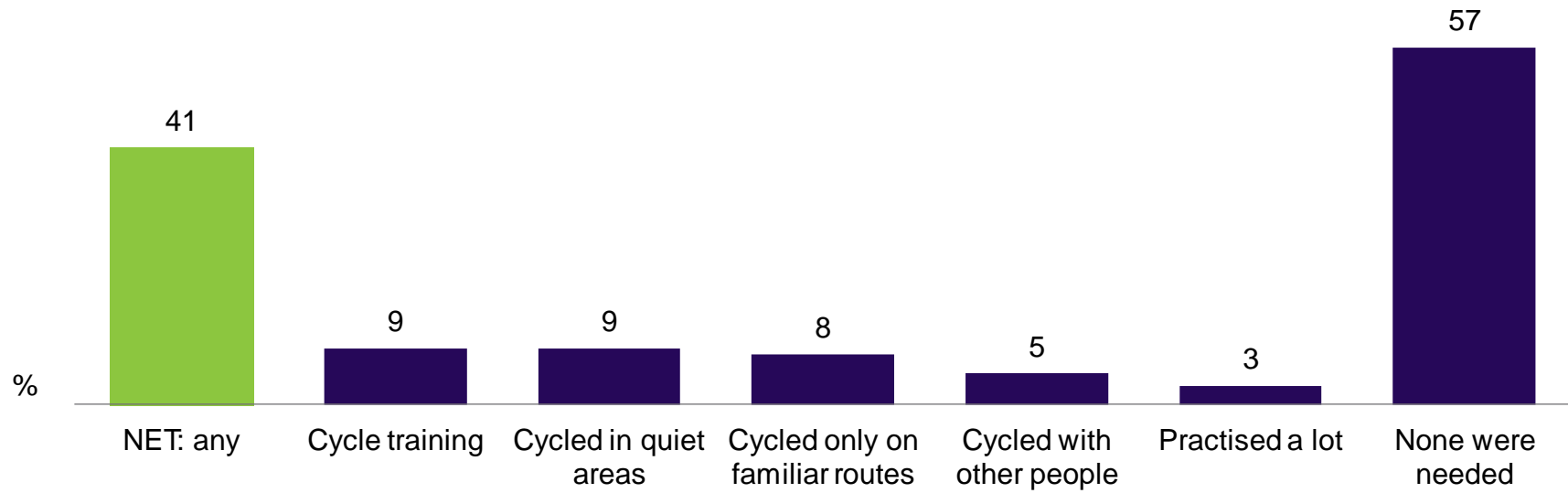
QC5: Why did you have a break from cycling? Base: All cyclists who have taken a break from cycling (368)

QC6: What prompted you to start cycling? Base: All cyclists (532)



Over half (57%) didn't need anything to build their confidence before cycling (or taking it up again). Among those that did, cycle training, and cycling in quiet / familiar areas were the most common activities

Steps taken to build up cycling confidence



Mentions over 2% shown

QC8: When you took up cycling, what steps, if any, did you take to build your confidence as a cyclist?

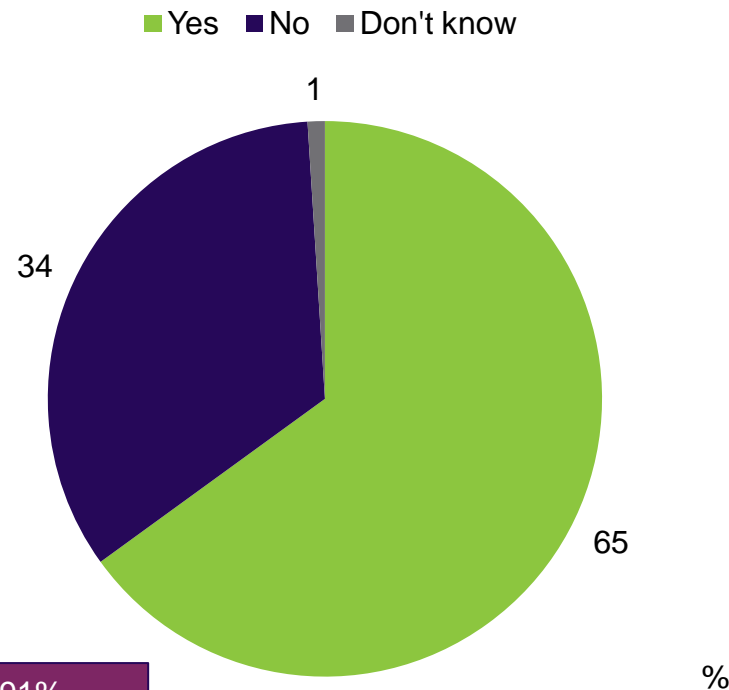
Base: All cyclists (532)



Among bike owners, two thirds maintain their bike and most do it themselves (64%)

Bike maintenance

Do you maintain your bicycle?



Cyclists: 91%
Non-cyclists: 53%

How do you maintain the bicycle?



Mentions over 1% shown



Behaviour change



Behaviour change model

- ➔ The behaviour change model categorises cyclists and non-cyclists into broad behavioural groupings
- ➔ Cyclists are presented with a number of statements regarding the possibility of cycling more (such as “thinking about doing this”) and must choose the one which most applies to them
- ➔ Non-cyclists are presented with the same statements but are asked to respond in relation to the possibility of taking up cycling
- ➔ The behavioural groupings are based on responses to these statements, a full list of which is found on the next slide
- ➔ The statements (which are shown on the next slide) do not represent a linear progression, and Londoners may move between any of the groups over time
- ➔ TfL has used a behaviour change model for some years, however in 2013 the question was substantially revised
 - While this is likely to improve the functioning of the model going forward, it means that past comparisons are not possible



Behaviour change model – definitions

NB: for cyclists question asked about *cycling more*, for non-cyclists question is about *taking up cycling*

	Grouping	Proportion of <u>cyclists</u> (in last twelve months)	Proportion of <u>non-cyclists</u> (including 'not in the last 12 months')
You have never thought about it, but would be unlikely to start in the future	Pre-contemplation	4%	31%
You have thought about it but don't intend starting in the future	Pre-contemplation	8%	32%
You have never thought about it but could be open to it in the future	Pre-contemplation	4%	10%
You are thinking about starting soon	Contemplation	9%	7%
You have decided to start soon	Preparation	3%	1%
You have tried to start recently, but are finding it difficult	Change	4%	1%
You have started recently and are finding it quite easy so far	Change	6%	1%
You started a while ago and are still doing it occasionally	Sustained change	25%	6%
You started a while ago and are still doing it regularly	Sustained change	33%	1%
You had started doing this but couldn't stick to it	Lapsed	3%	8%
Don't know	-	2%	2%

B1/2: Thinking about the possibility of "cycling more" / "taking up cycling", which of these descriptions would you say most applies to you?

Base: all cyclists in the last 12 months (516) / all not cycled in the last 12 months (857)



Attitudes towards cycling more

- ➔ Cyclists are most likely to be in the 'sustained change' category, meaning they are already 'cycling more recently and are still doing it either regularly or occasionally' (58%)
- ➔ A further 9% are in the 'change' categorisation, 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'
- ➔ 9% of cyclists are in the 'contemplation' category, meaning they are 'thinking about cycling more soon'
- ➔ There is evidence that many cyclists would like to cycle more than they do
 - 67% of occasional cyclists, and 41% of regular cyclists, say they intend to cycle more than they do now



Attitudes towards taking up cycling

- ➔ Most non-cyclists (73%) are in the 'pre-contemplation' category, meaning they:
 - 'Have never thought about taking up cycling, but would be unlikely to start in the future'
 - 'Have thought about it but don't intend starting in the future'
 - 'Have never thought about it but could be open to it in the future'
- ➔ 8% of non-cyclists are in the 'lapsed' category, meaning that they 'started cycling, but couldn't stick to it'



Motivations and impact of cycling more

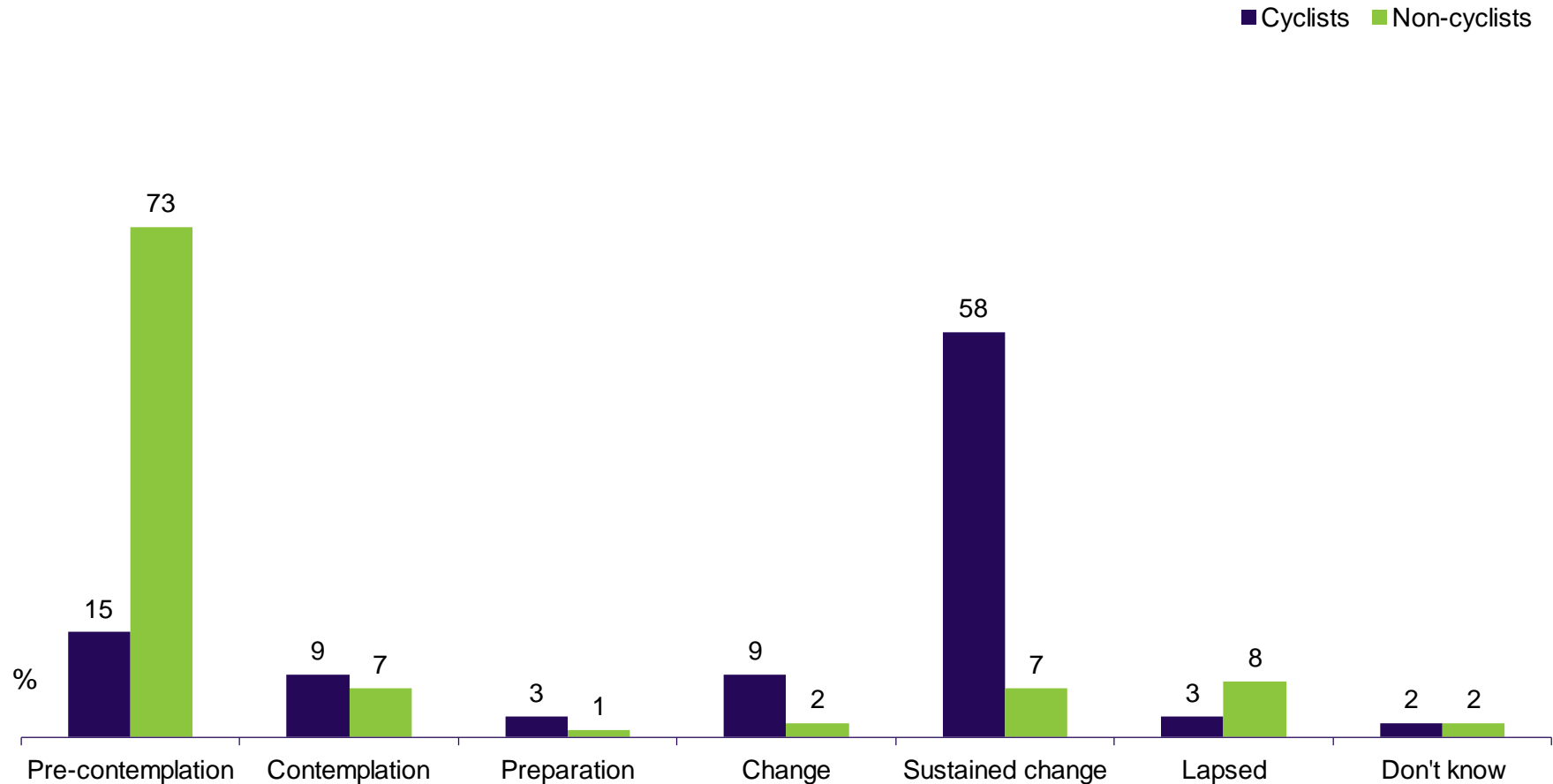
- ➔ As seen in 2012, for both cyclists and non-cyclists the main motivators and barriers to cycling more/taking up cycling are the same
 - The main motivator is increased fitness
 - The desire to save money and time are also reasons commonly mentioned
- ➔ Safety concerns are commonly mentioned as a deterrent to increasing/taking up cycling, particularly for non-cyclists
 - Among cyclists, the poor weather was also mentioned as a deterrent*
- ➔ For both cyclists and non-cyclists, if they were to cycle more/take up cycling, bus, car and Tube are the modes that cycling would most likely replace
- ➔ Most have taken no steps towards cycling more / taking up cycling
 - Among those that have, purchasing equipment was the most common

* The weather in early 2013 was particularly bad



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

Behaviour change model



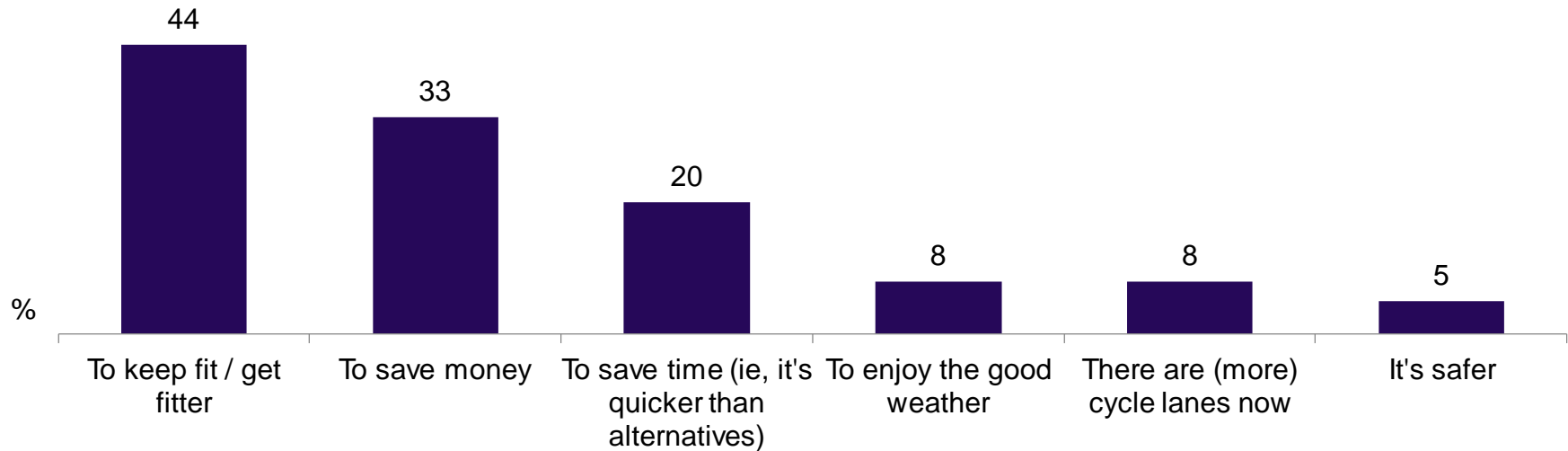
B1/2: Thinking about the possibility of "cycling more" / "taking up cycling", which of these descriptions would you say MOST applies to you?
Base: All cyclists in the last 12 months (516) / all not cycled in the last 12 months (857)



Keeping fit and saving money are the main motivations for considering cycling more

Motivations for considering cycling more

Note: no significant differences between regular and occasional cyclists



Mentions over 4% shown

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

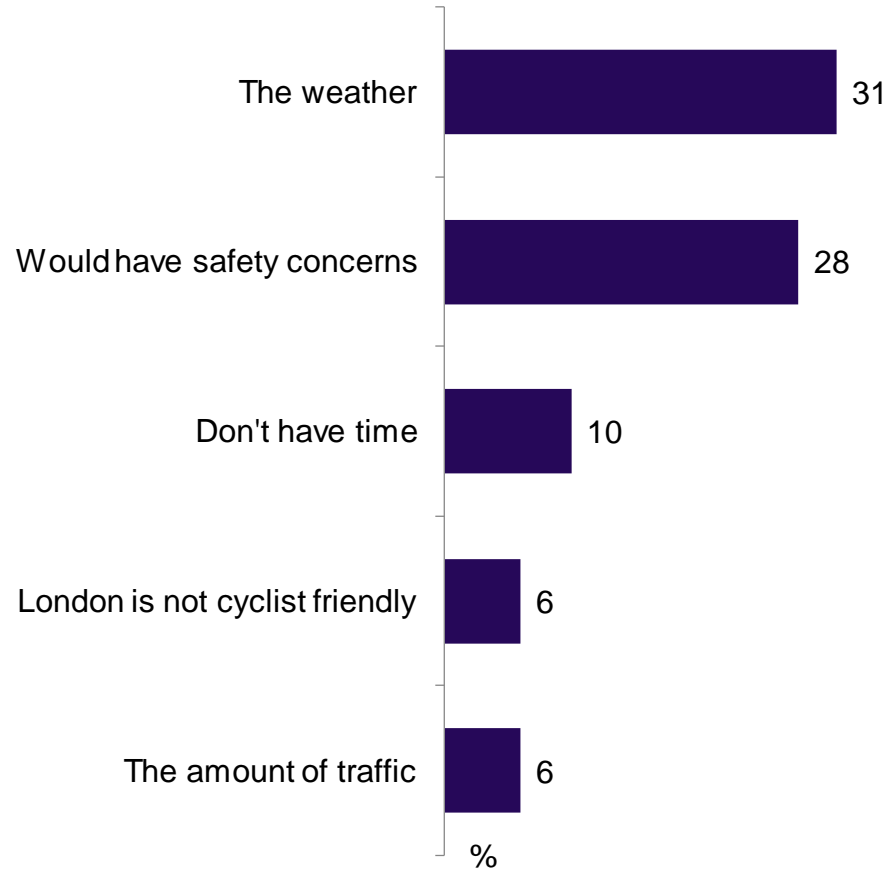
Base: all who have cycled in the last 12 months and are planning to cycle more (82)



Cyclists are most likely to be put off cycling more by the weather or safety concerns

Deterrents to cycling more

Note: no significant differences between regular and occasional cyclists



Mentions over 4% shown

E7: What deters you from cycling more?

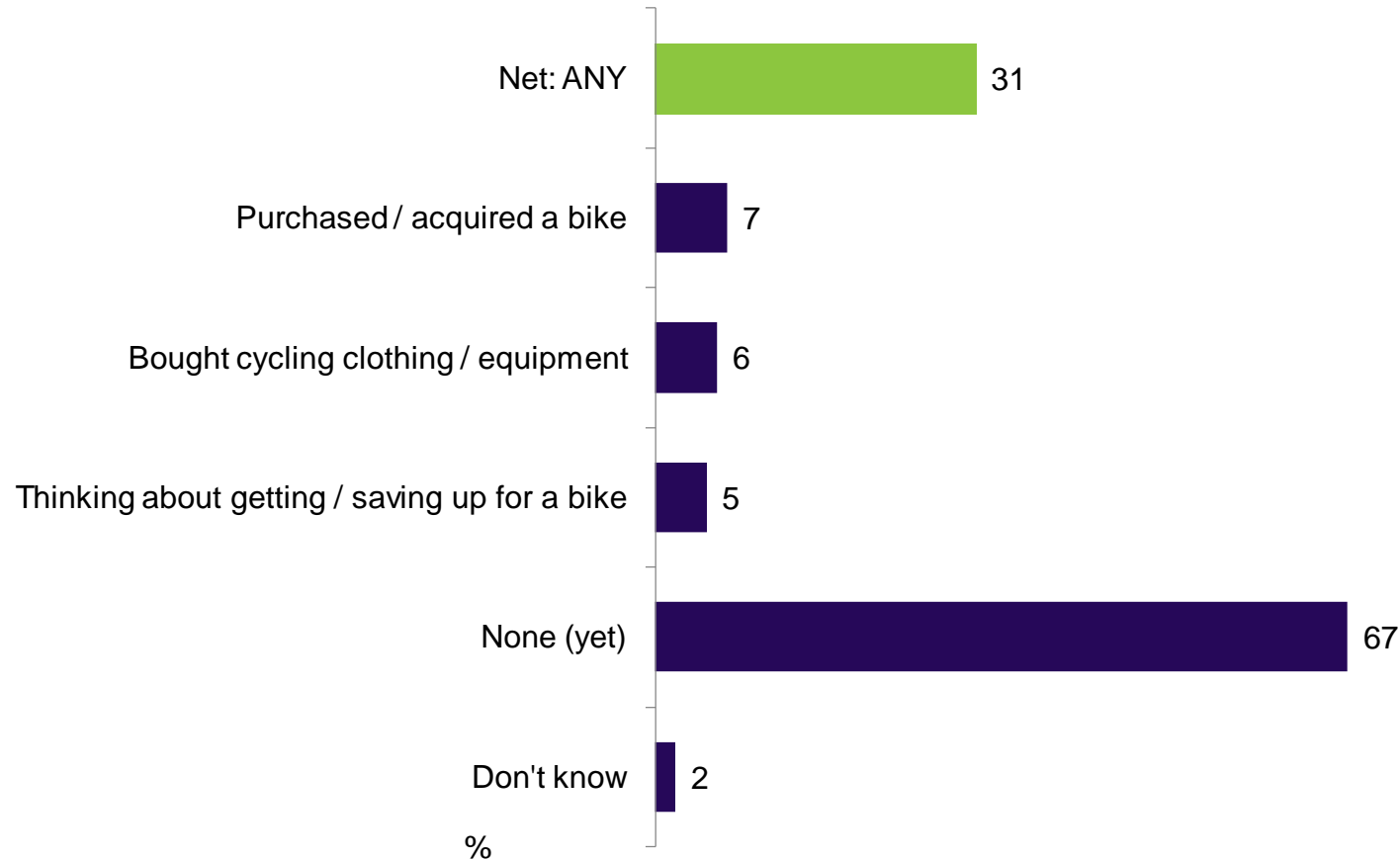
Base: all cyclists (532)



Among cyclists who have taken steps towards cycling more, the most common involve purchasing equipment

Steps taken towards cycling more

Note: no significant differences between regular and occasional cyclists



Mentions over 4% shown

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

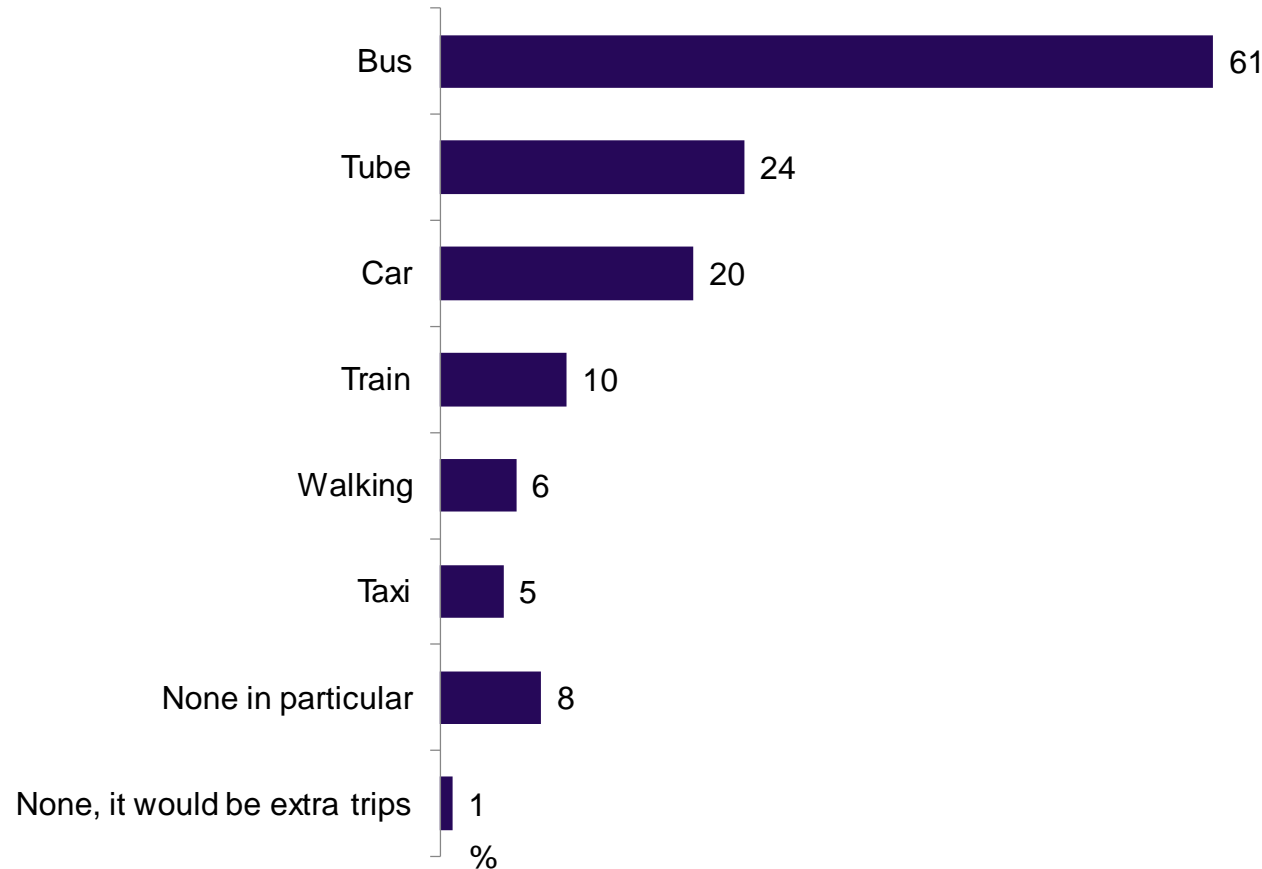
Base: all cyclists in the last 12 months planning to cycle more (82)



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

Potential modal shift

Note: no significant differences between regular and occasional cyclists



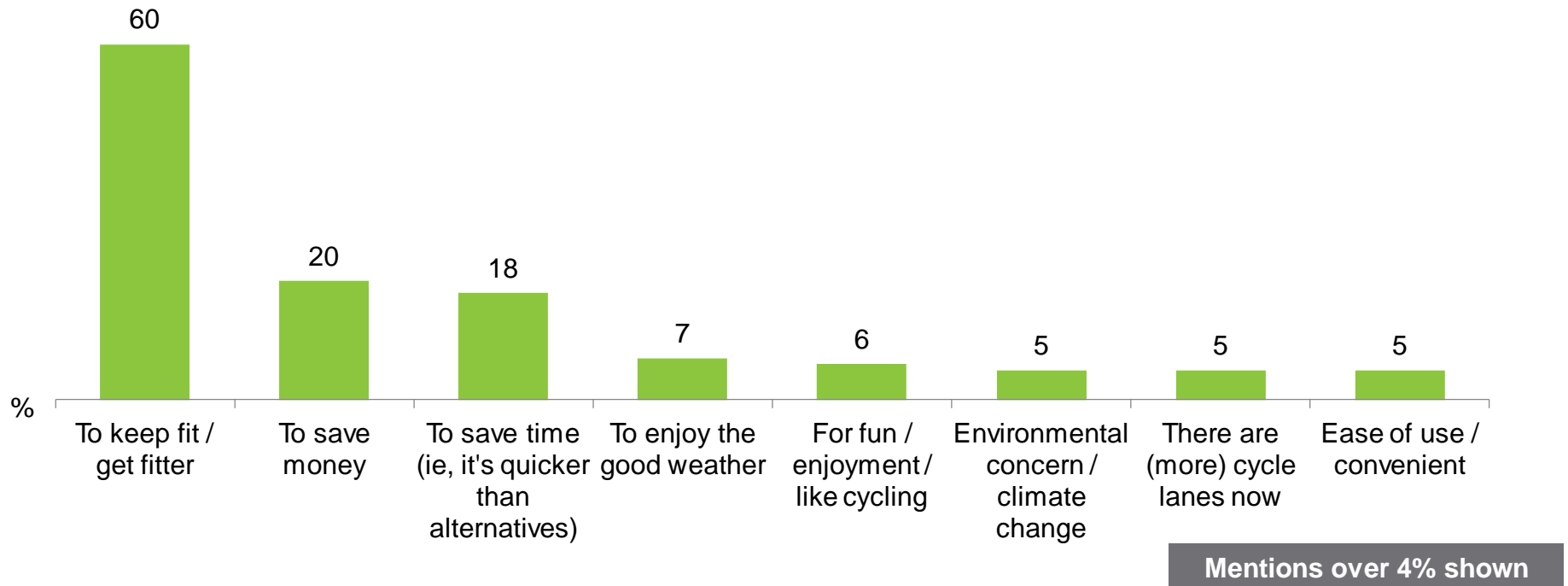
E5: What type of transport, if any, would you use less if you cycled more?

Base: all cyclists in the last 12 months planning to cycle more (82)



For non-cyclists, getting or keeping fit is the main motivation for taking up cycling

Motivations for considering taking up cycling



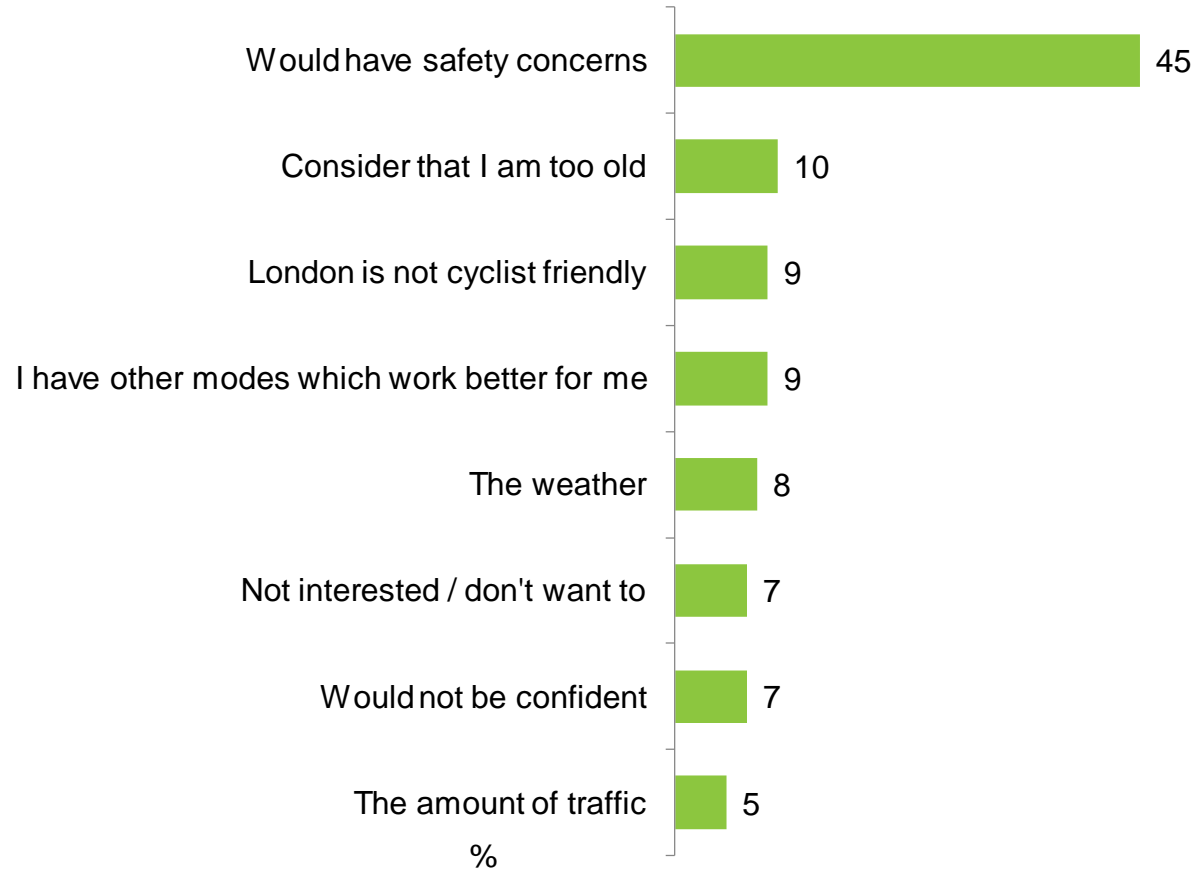
E4: Why are you considering taking up cycling?

Base: all who have not cycled in the last 12 months and now intend to 'take up cycling' (222)



Non-cyclists are most likely to be put off from taking up cycling by safety concerns

Deterrents to taking up cycling



Mentions over 4% shown

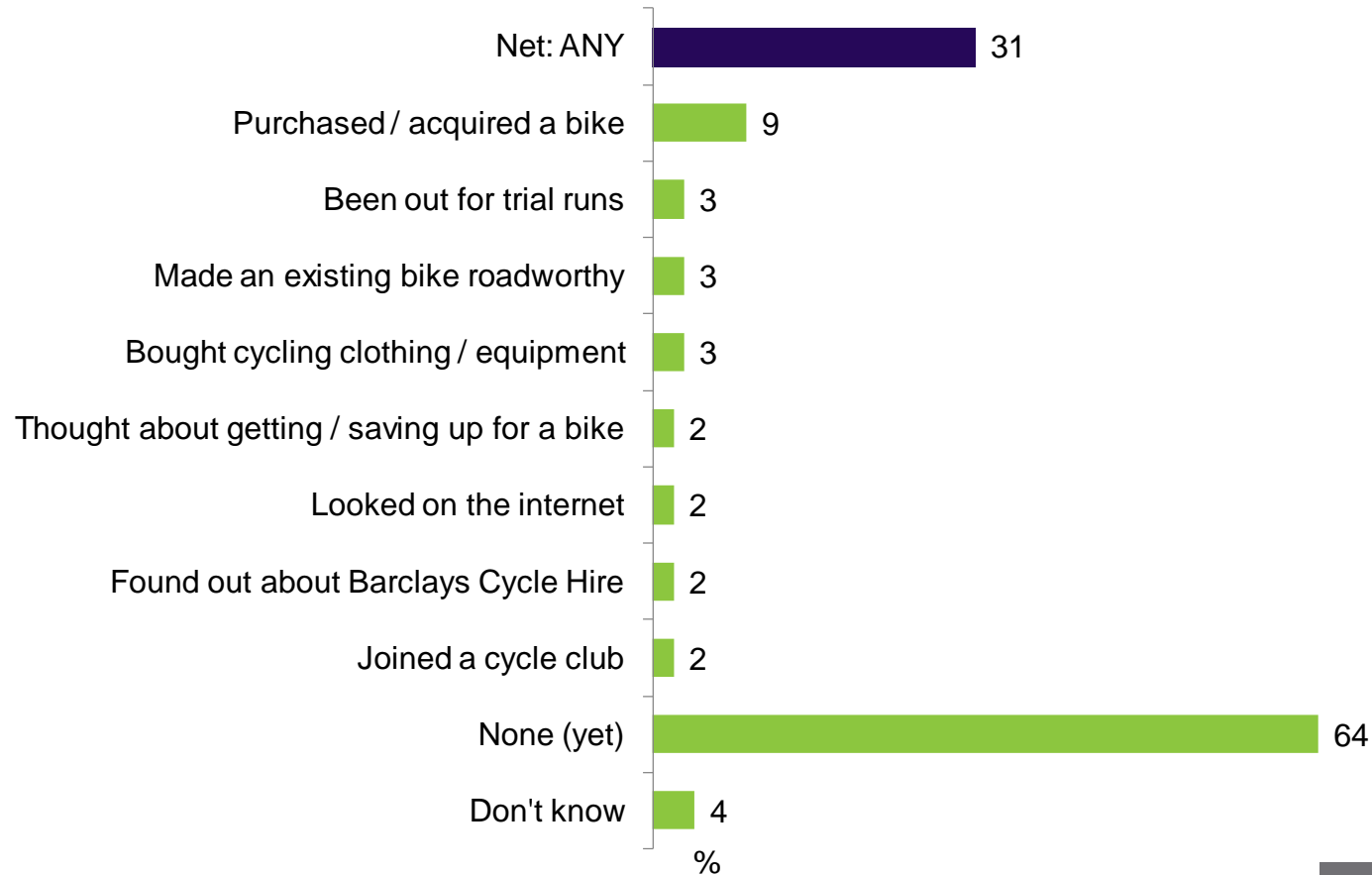
E7: What deters you from taking up cycling?

Base: all non-cyclists (841)



Most non-cyclists who intend to take up cycling have taking no steps towards it as yet; 9% have bought / acquired a bike

Steps taken towards taking up cycling



Mentions over 1% shown

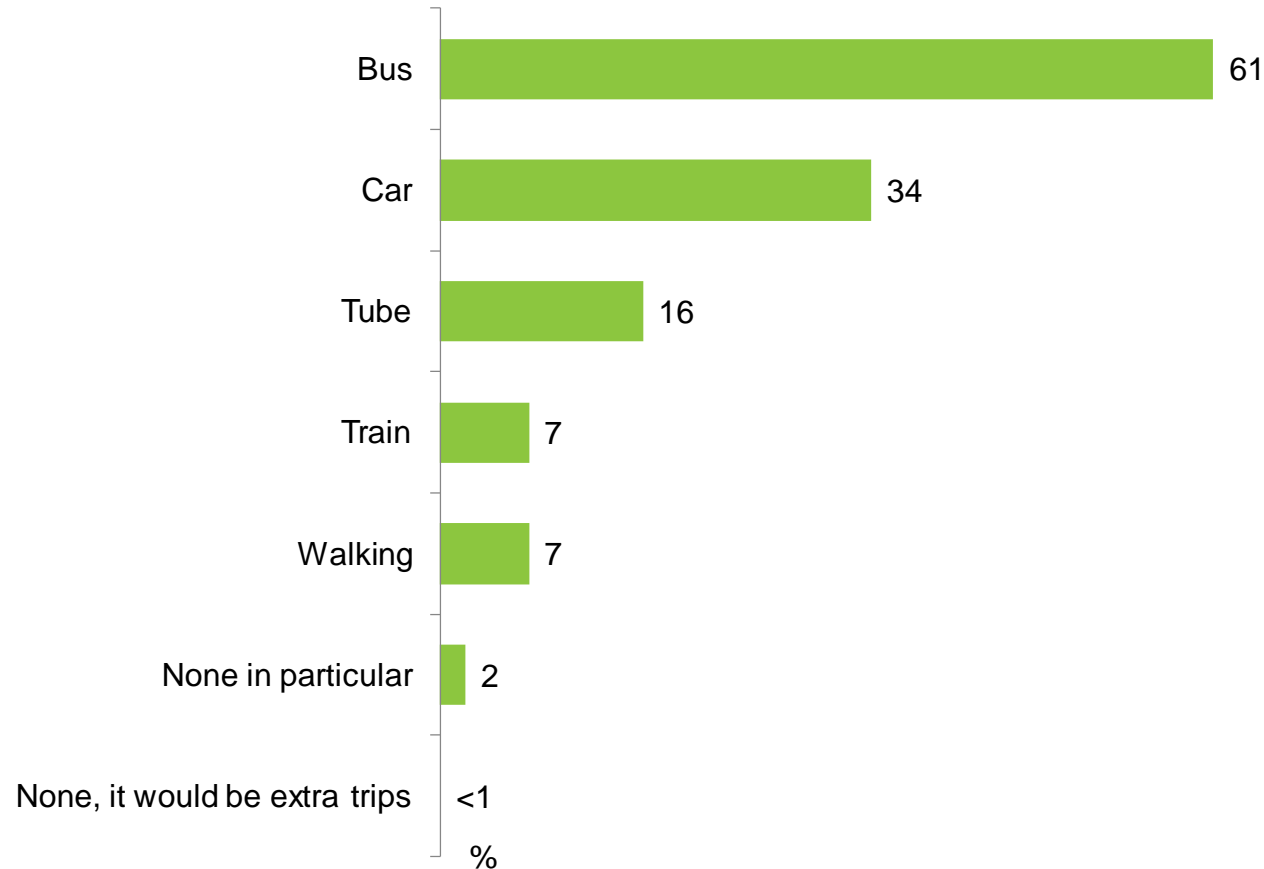
E2: What practical steps, if any, have you taken towards taking up cycling in the next 12 months?

Base: all who have not cycled in the last 12 months and now intend to 'take up cycling' (222)



Of those non-cyclists considering taking up cycling, most would use the bus less, and a third would use the car less

Potential modal shift



E6: What type of transport, if any, would you use less if you take up cycling?

Base: all who have not cycled in the last 12 months and now intend to 'take up cycling' (222)



Motivations





Motivations

- ➔ Londoners are more likely to find cycling in London unappealing (43%) than appealing (36%)
 - Men, young Londoners, BAME Londoners and current cyclists are the groups more likely to find cycling appealing than unappealing
- ➔ Among cyclists, the most appealing cycling journeys are those made in the local area: three quarters of cyclists (77%) find these journeys appealing, while just 11% find them unappealing
- ➔ Cycling in Central London, or journeys beyond the local area, are both appealing to fewer than half of London's cyclists
 - As would be expected, regular cyclists find journeys more appealing than occasional cyclists – 62% of occasional cyclists find the idea of making journeys beyond their local area to be unappealing (compared with 31% of regular cyclists)



Perceptions

- Cycling scores highly on emotional factors: at least 80% of Londoners agree that cycling is becoming more popular and that it is enjoyable
 - Three quarters (77%) say that cycling is a good social activity
- Cycling is also viewed as a convenient mode of transport – most agree that cycling is fast, convenient and gets you to your destination when you expect to arrive
- However, as seen in 2012, concerns about safety remain
 - 90% feel cyclists are vulnerable to other road users
 - 85% believe traffic makes people afraid of cycling on the streets of London (though this has fallen significantly from 90% in 2012, back to pre-2011 levels)
 - Only around a quarter feel that cycling is a safe way of getting about (29%), or feel confident cycling on London's streets (27%)
- Most cyclists (70%) feel at least 'fairly confident' cycling on London's streets
 - Confidence has risen in 2013, driven by increased confidence among occasional cyclists – up from 37% in 2012 to 53% this year



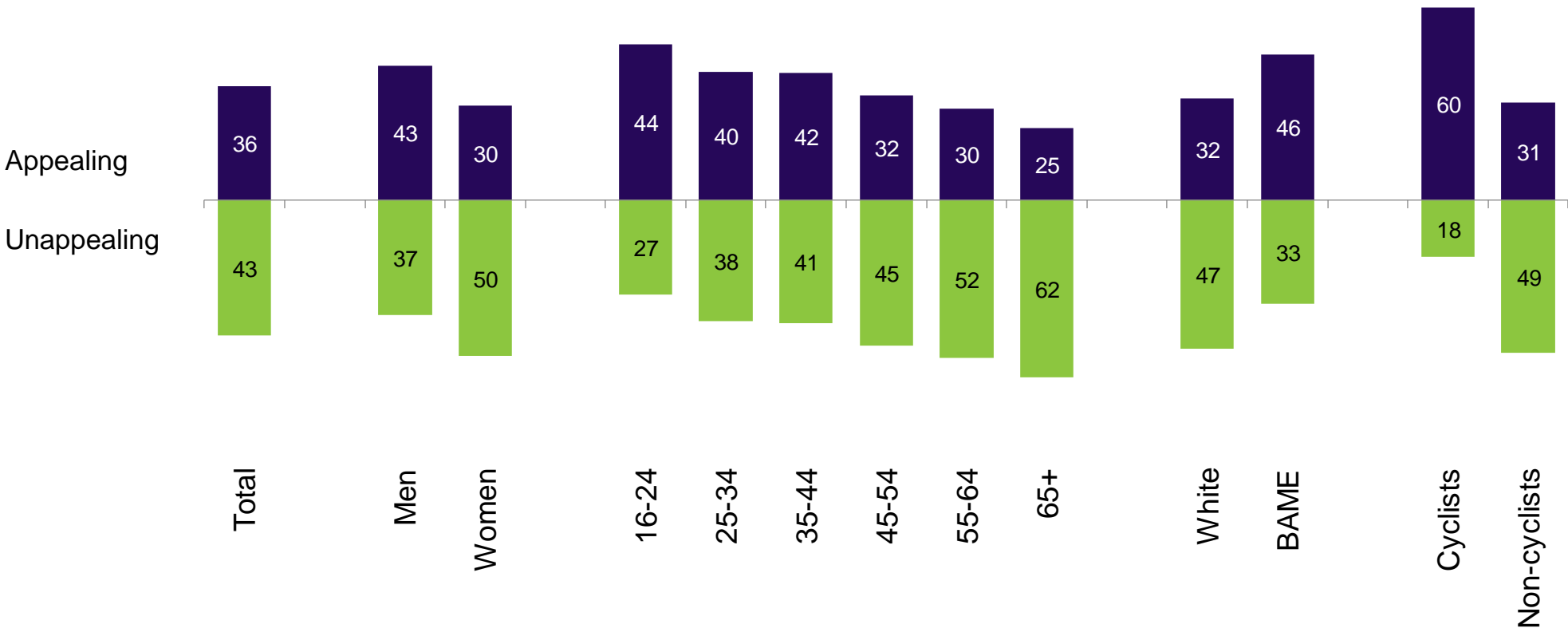
Attitudes towards cyclists

- ➔ The majority agree that cyclists are 'fit and healthy', though some more negative attitudes towards cyclists remain
 - Just 44% consider cyclists to be 'considerate', 38% agree that cyclists are 'law abiding', and there is an emotional disconnect – just 37% agree that cyclists are 'like you'
 - 43% consider cyclists to be 'dangerous'
- ➔ The views of cyclists towards themselves / other cyclists are largely in line with those of non-cyclists
 - Fewer than half of cyclists agree that cyclists are 'considerate', 'law abiding' or 'like you'



Men, younger and BAME Londoners are most likely to find cycling appealing. 60% of cyclists find cycling in London appealing

Appeal of cycling in London

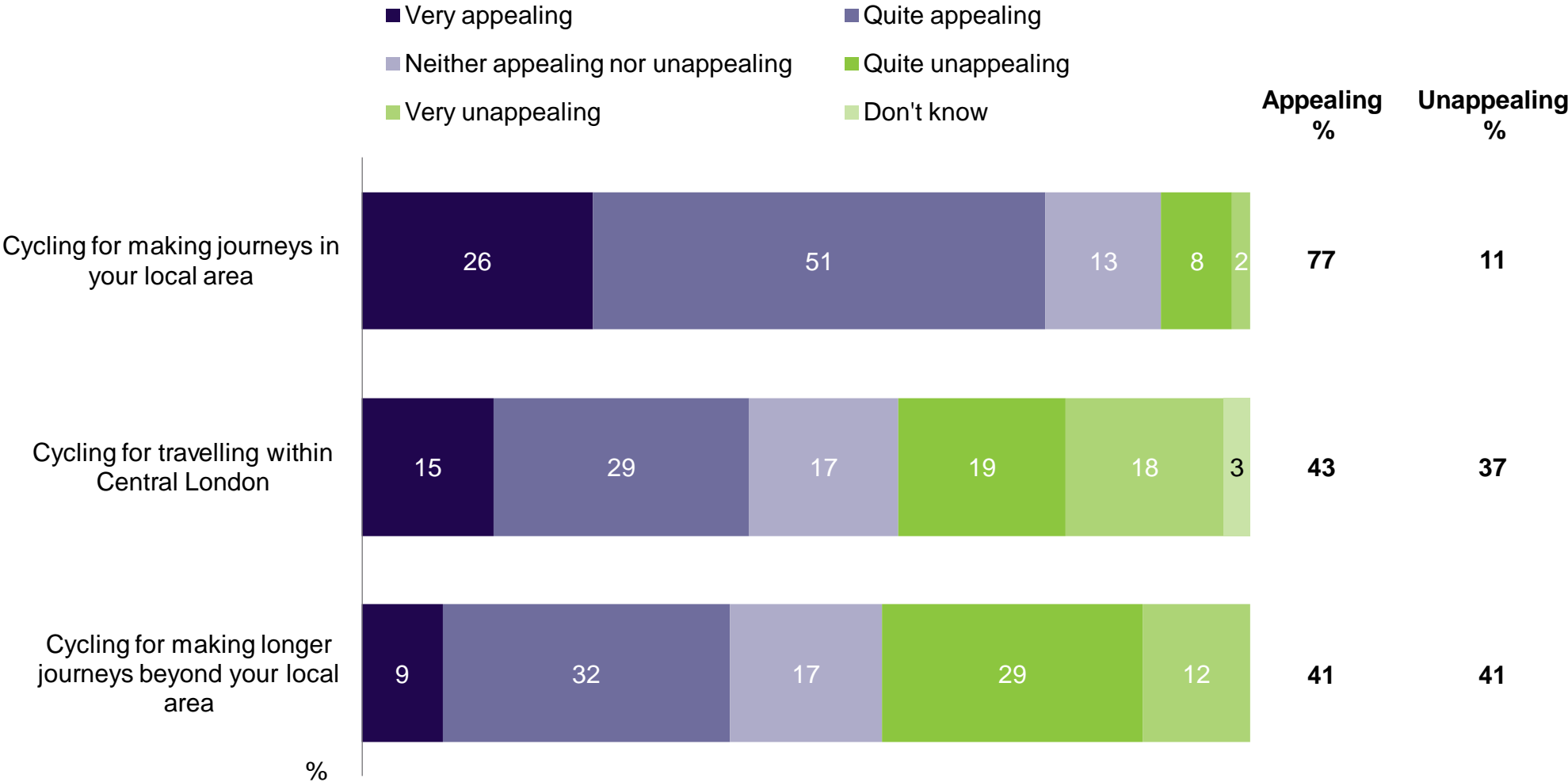


A4: Could you please tell me how appealing or unappealing you find cycling within London?
Base: all (1,373)



As in 2012, cycling in the local area is more likely to appeal to cyclists than cycling in central London or beyond their local area

Appeal of cycling in specific scenarios - cyclists

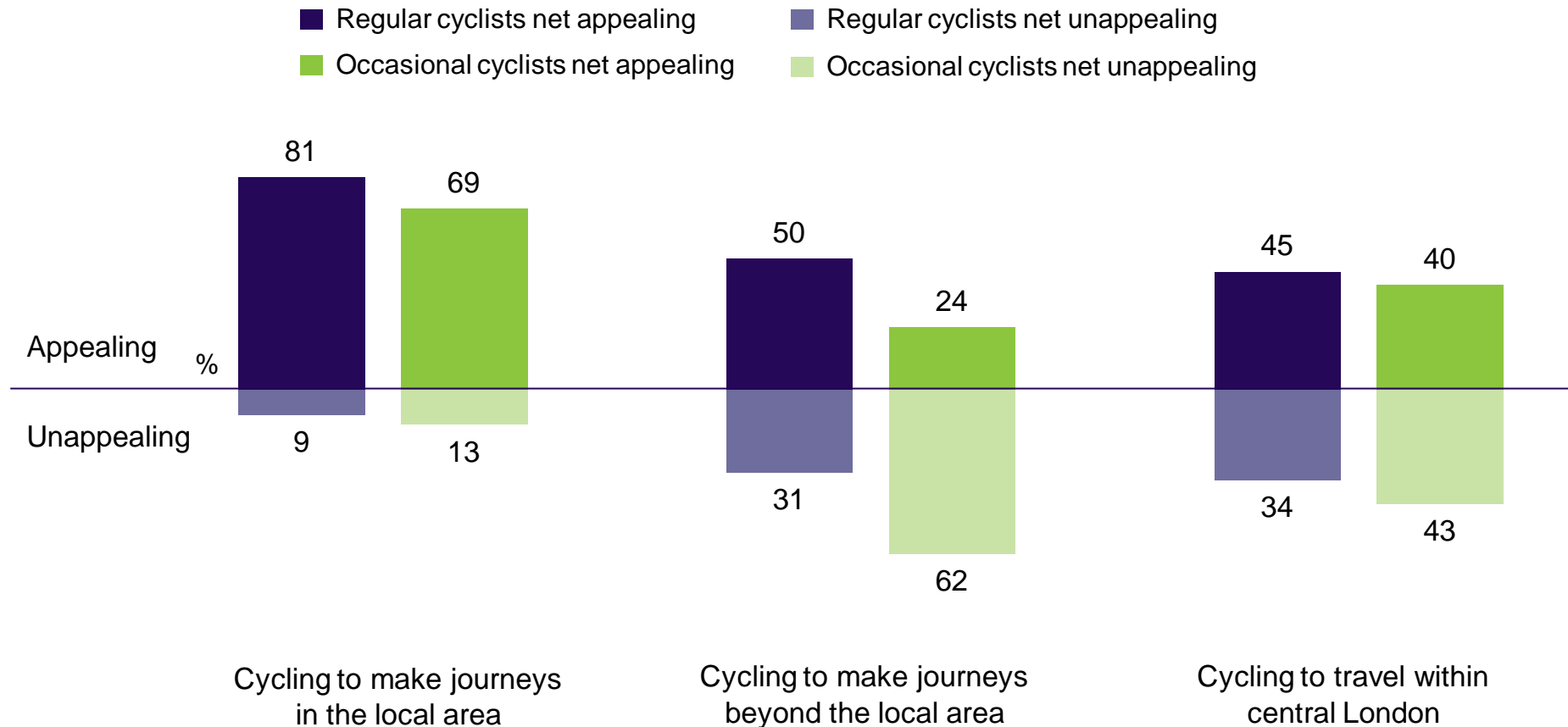


A5: Thinking specifically about cycling, can you please tell me how appealing or unappealing you find it for XXX. Do you find it ...?
Base: all cyclists who don't find the idea of cycling very unappealing (500)



A third of regular cyclists, and at least 40% of occasional cyclists, find journeys beyond their local area and in central London unappealing

Appeal of cycling in specific scenarios – cyclists



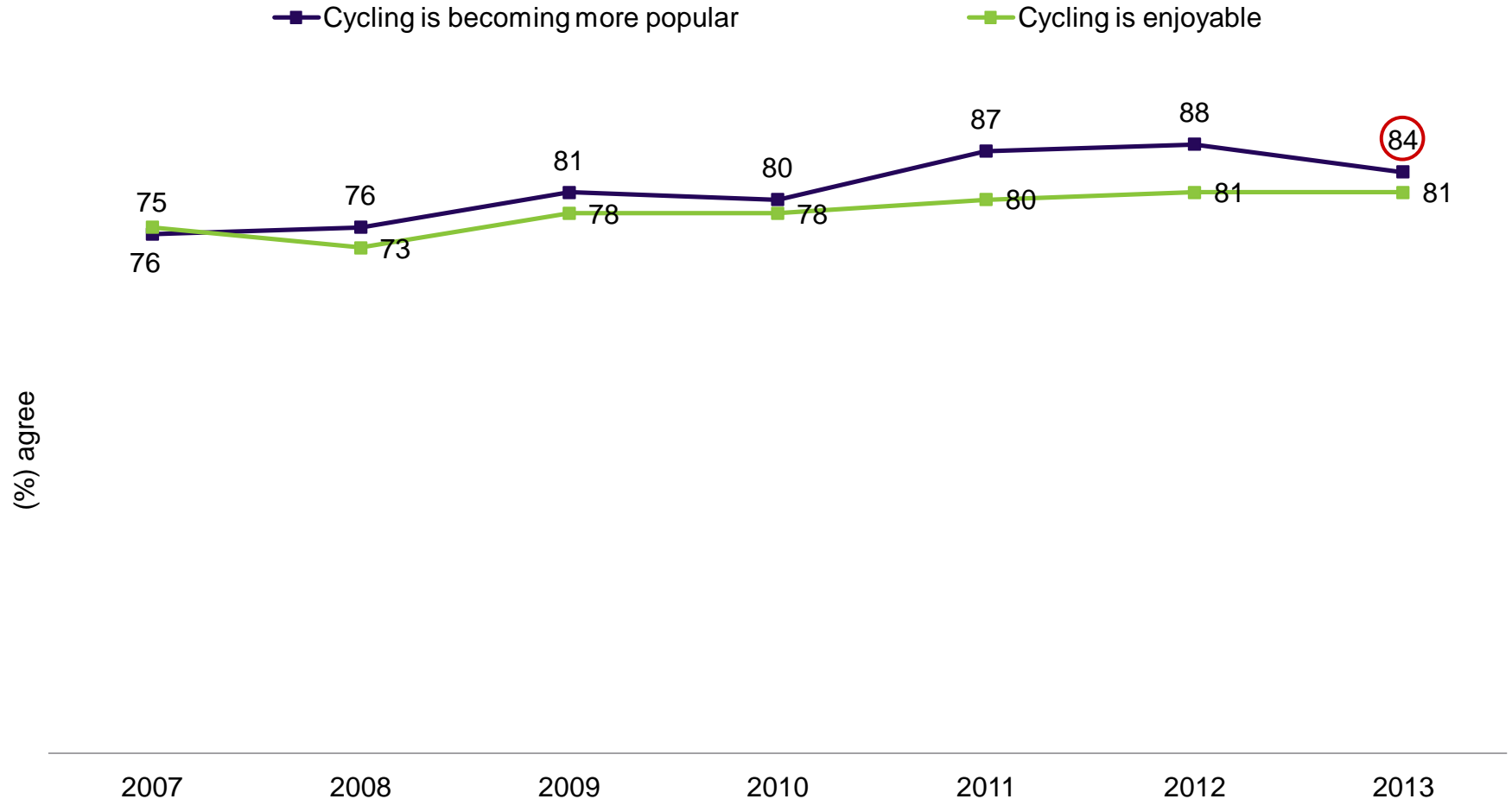
A5: Thinking specifically about cycling, can you please tell me how appealing or unappealing you find it for XXX. Do you find it ...?

Base: regular cyclists (319) and occasional cyclists (181)



Most Londoners agree that cycling is enjoyable, and becoming more popular (though there has been a significant fall since 2012)

Emotional factors



○ Significantly lower than 2012

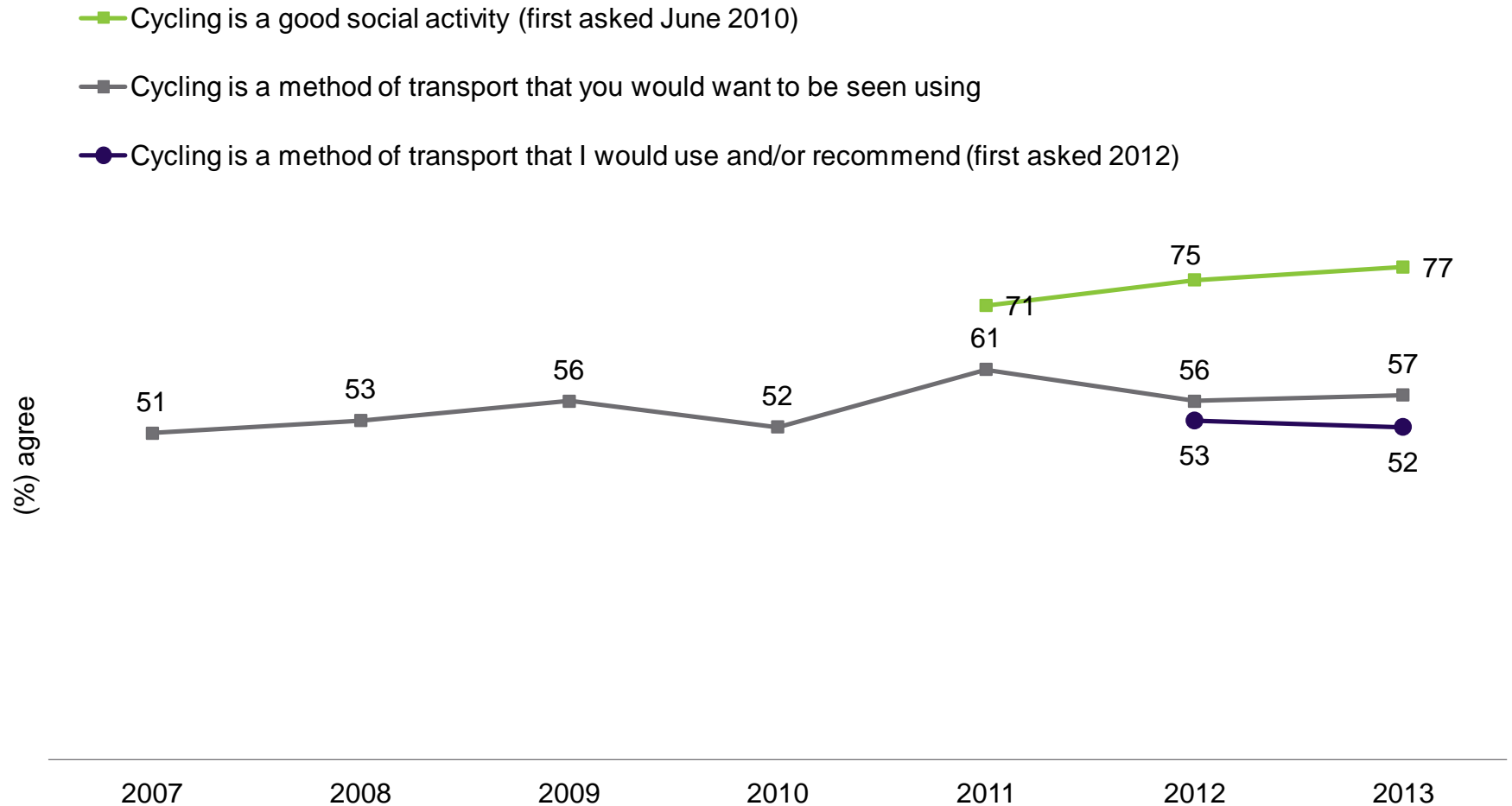
A1: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

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



Over half agree that cycling is a method of transport they would like to be seen using and/or recommend, and most agree that cycling is a good social activity

Social factors



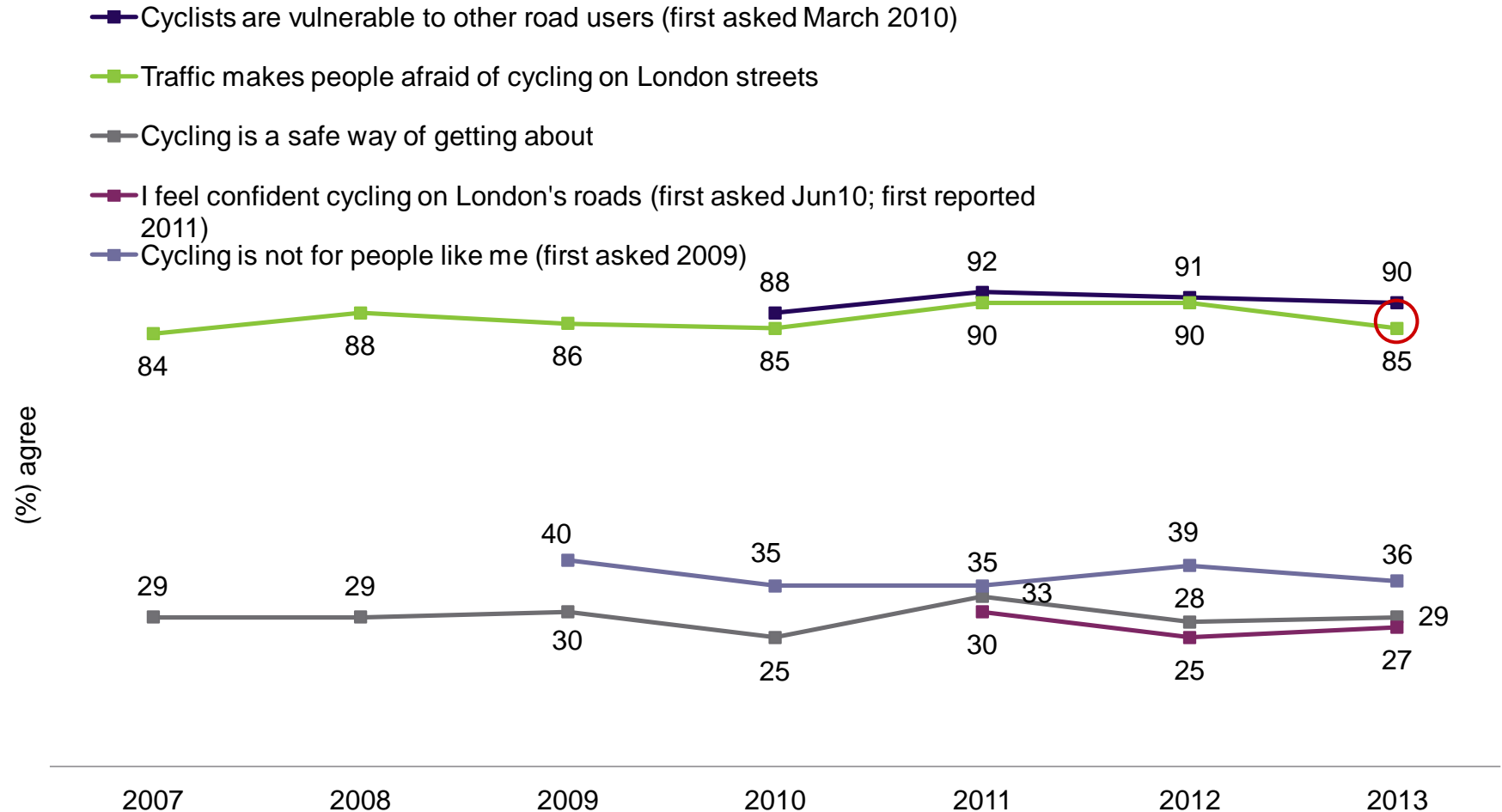
A1: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

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



Most Londoners continue to agree that cyclists are vulnerable to other road users, and that traffic makes people afraid of cycling in the Capital

Confidence factors



○ Significantly lower than 2012

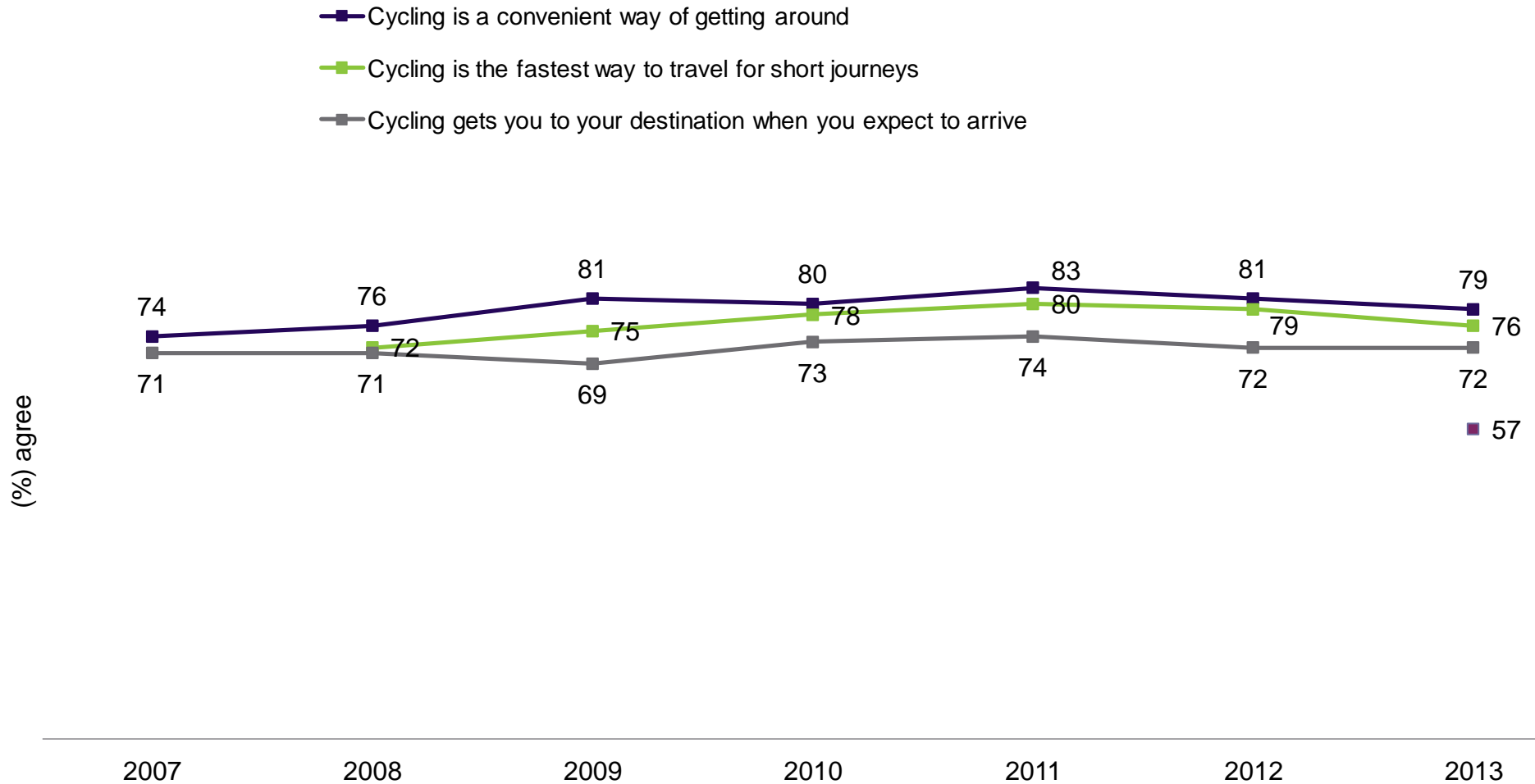
QC2: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

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



Cycling continues to be viewed as a convenient, fast and reliable mode of transport by most Londoners

Convenience factors



No significant differences compared with 2012

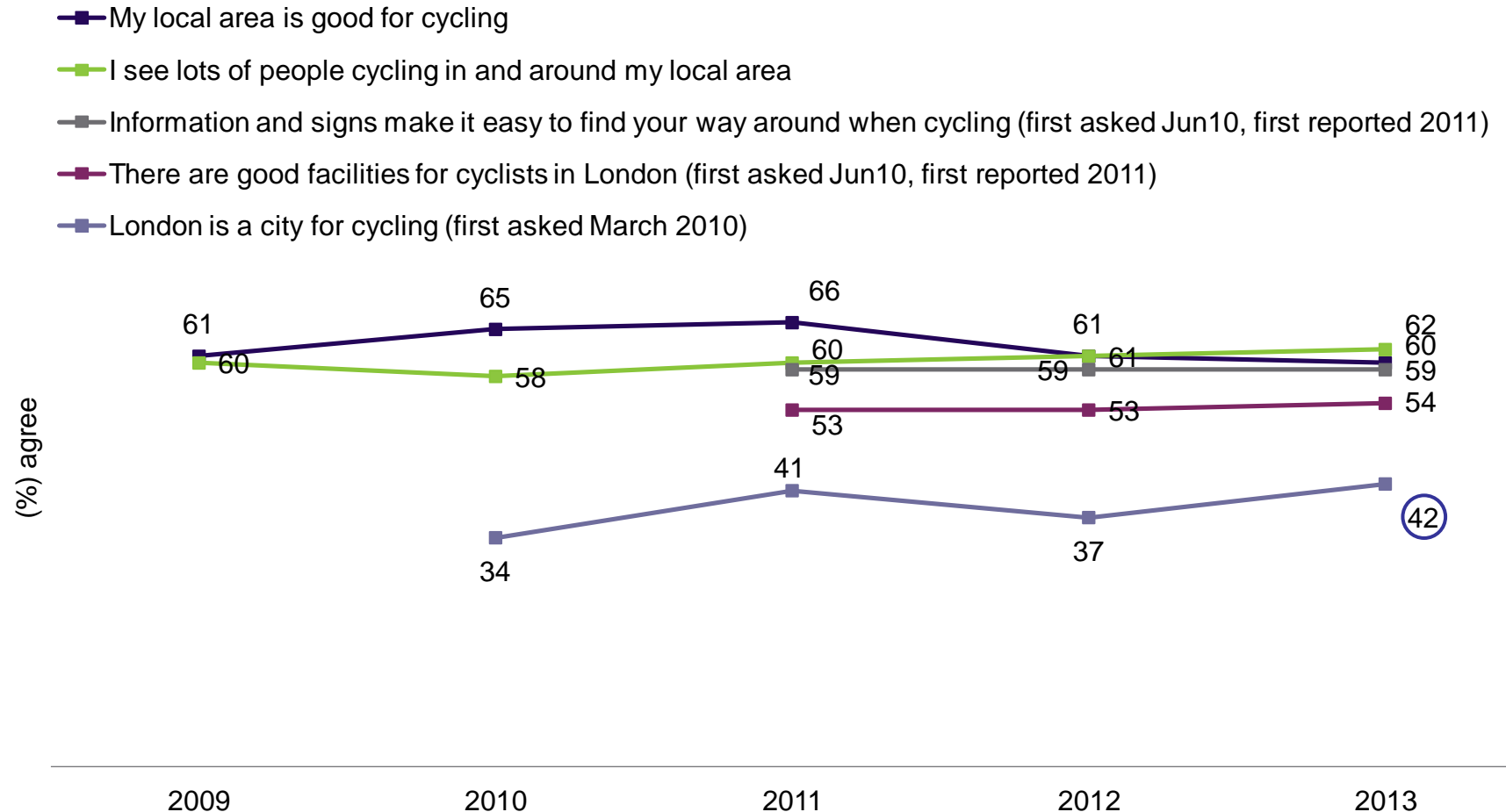
QC2: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

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



The proportion of Londoners agreeing that London is a city for cycling rose this year following a fall in 2012

Facility factors



○ Significantly higher than 2012

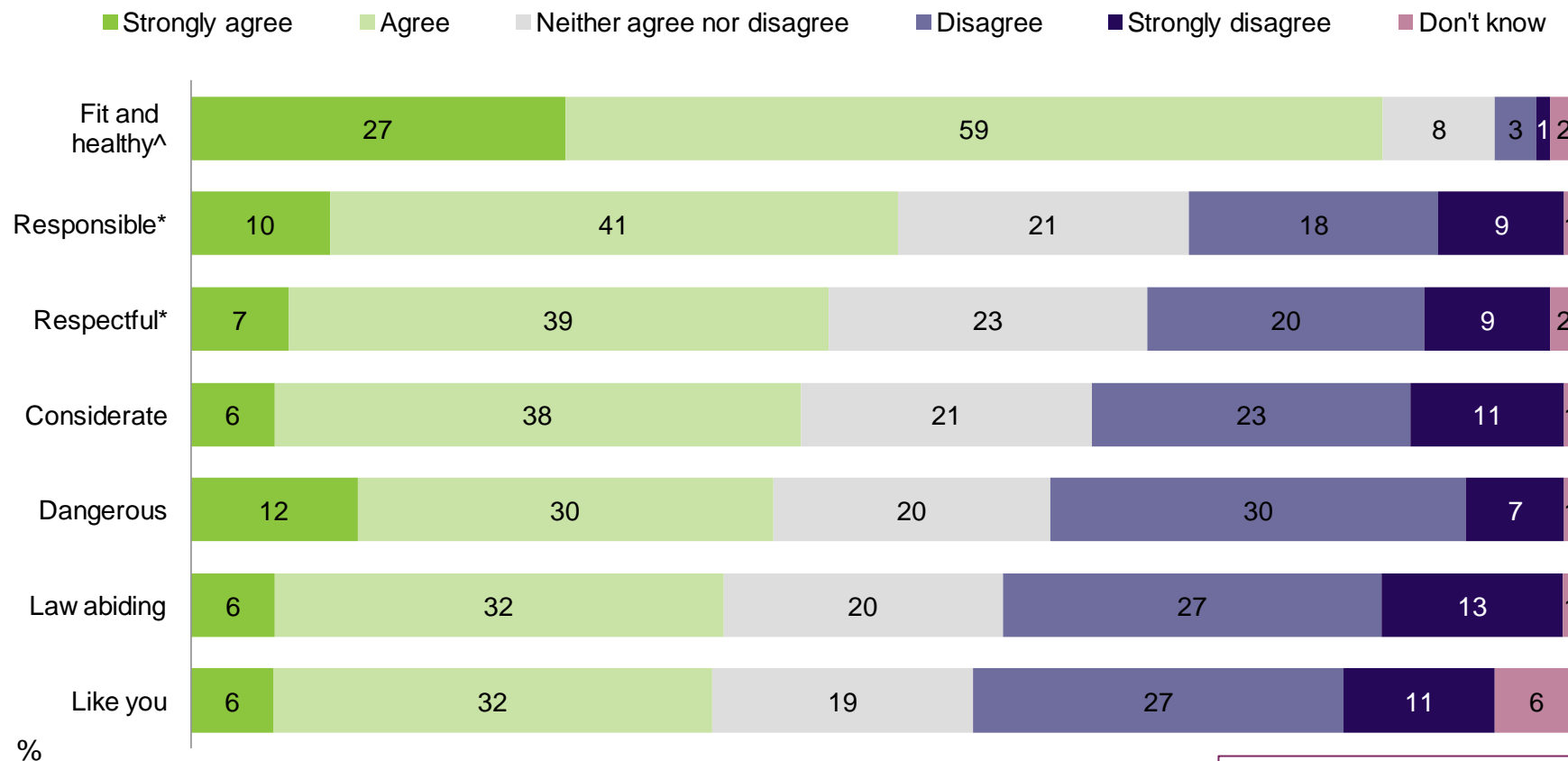
QC2: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

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



Most Londoners perceive cyclists to be fit and healthy; but 42% think they are dangerous

Attitudes towards cyclists



^ "and healthy" added 2013
* new in 2013

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

Base: All (1,373)



The proportion agreeing that cyclists are 'dangerous' fell this year after a rise in 2012; however, the proportion agreeing they are 'law abiding' also fell

Attitudes towards cyclists

% 'agree' or 'agree strongly'	2008	2009	2010	2011	2012	2013
Fit and healthy^	82	85	84	84	85	86
Considerate	39	43	39	46	45	44
Dangerous	55	49	51	42	47	42
Law abiding	33	36	36	41	42	38
Like you	31	37	38	37	40	37
Responsible*	n/a	n/a	n/a	n/a	n/a	51
Respectful*	n/a	n/a	n/a	n/a	n/a	46

^ "and healthy" added 2013
* new in 2013

 Significantly lower than 2012

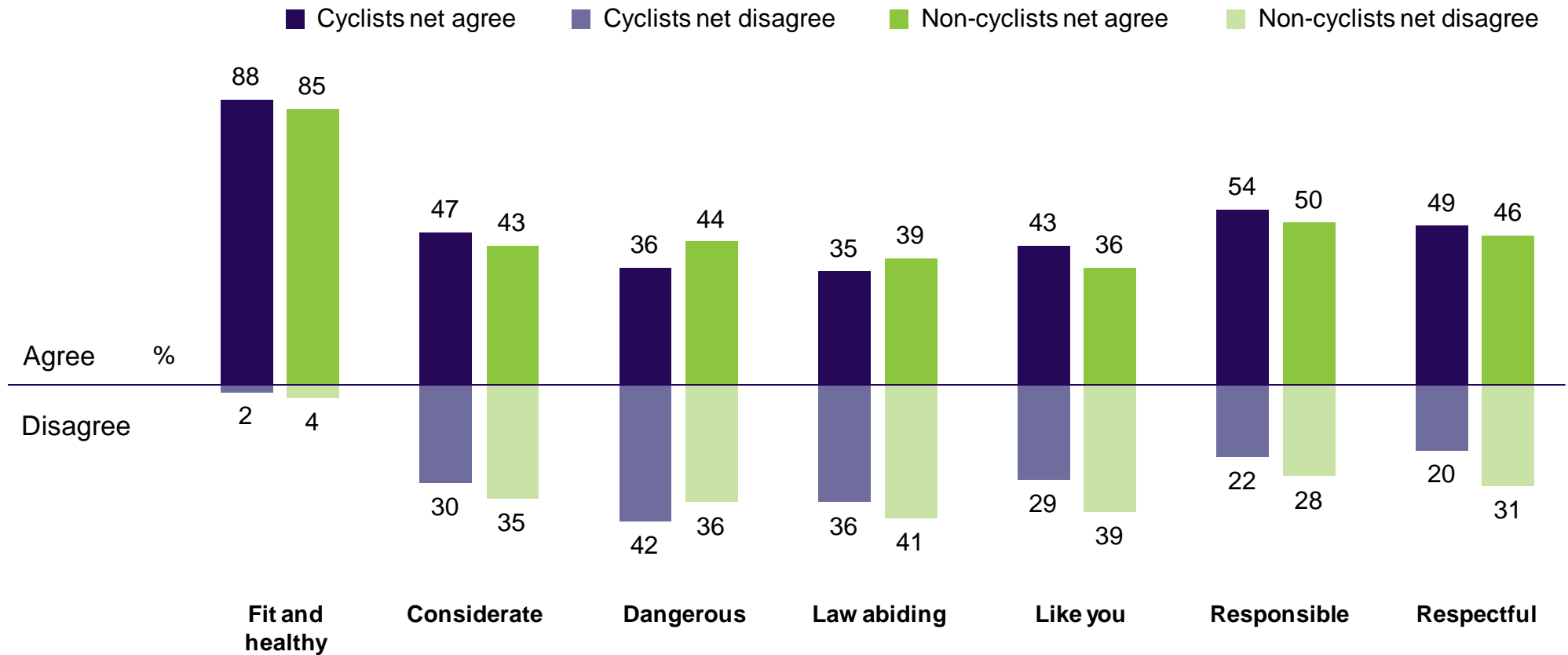
H1: Do you feel that cyclists in general are...?

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



Around half of non-cyclists agree that cyclists are 'responsible' and 'respectful', but around three in ten disagree

Cyclist and non-cyclists



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

Base: all cyclists (532), all non-cyclists (841)

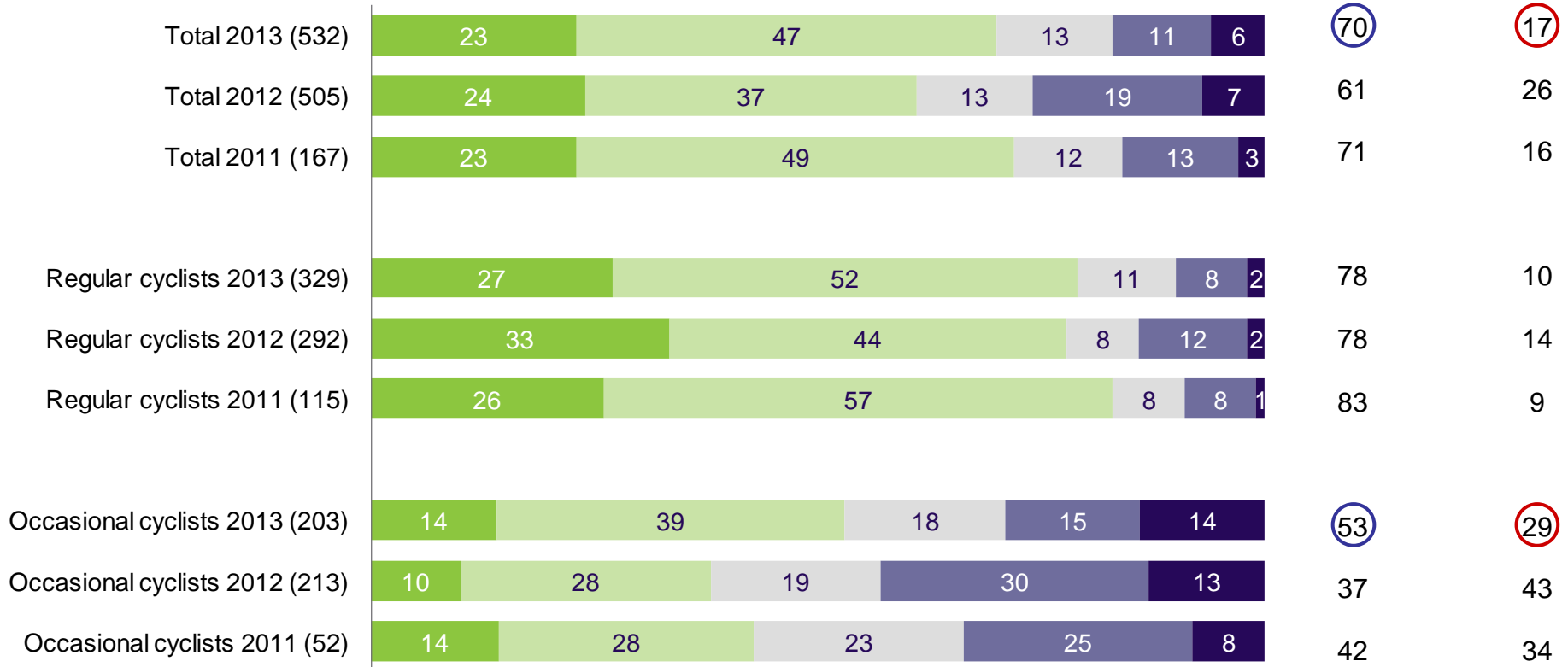


Confidence has risen in 2013, driven by increased confidence among occasional cyclists

Confidence cycling on London's streets

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

Confident % Not confident %



○ Significantly lower than 2012

○ Significantly higher than 2012

J1: Generally, how confident do you feel cycling on London's roads?

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



Barriers





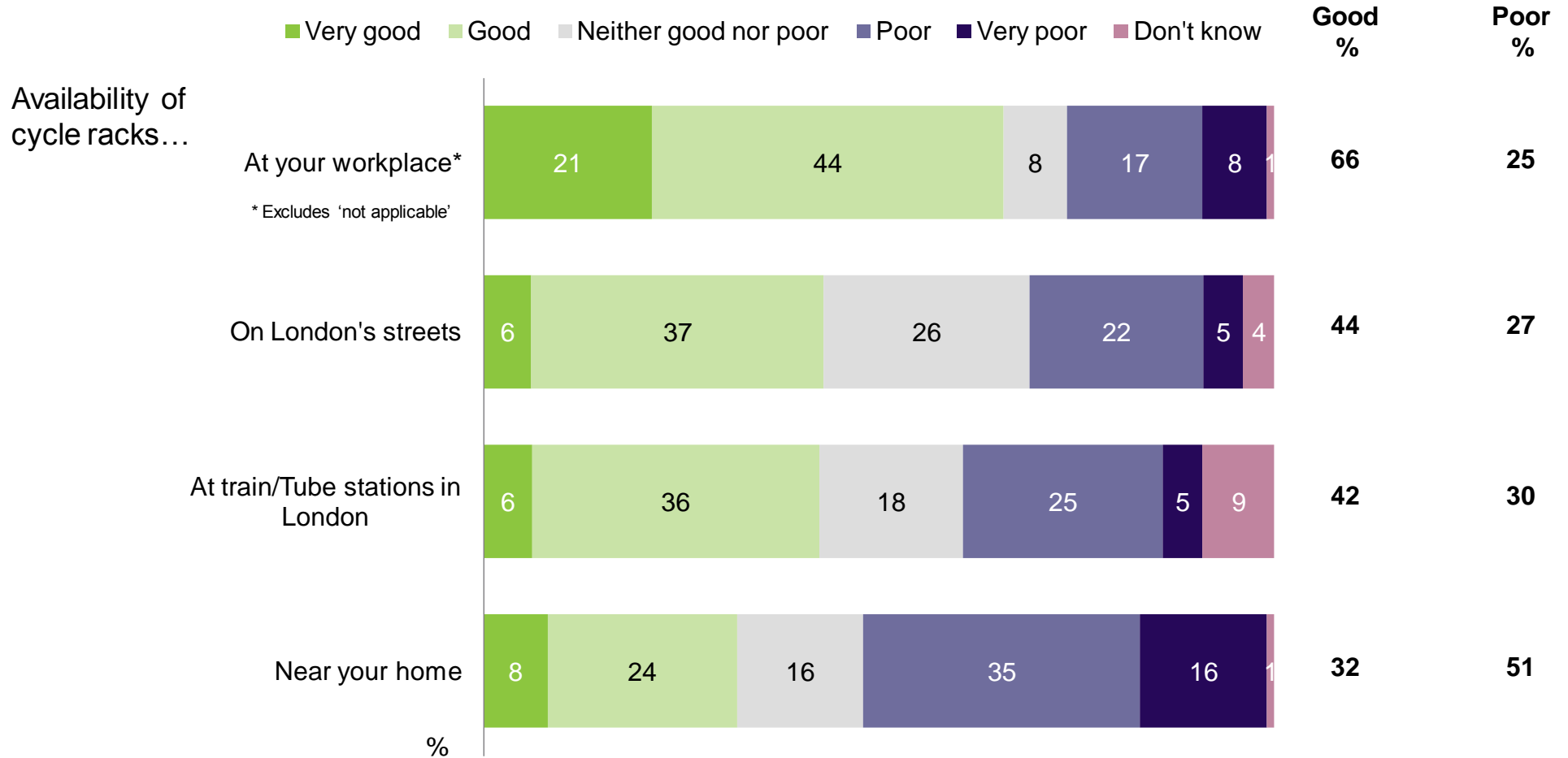
Barriers

- Around half of cyclists rate as 'poor' or 'very poor'...
 - The availability of cycle lanes
 - Security of bike when left
 - Safety of cycling
 - Availability of cycle racks near their home
- However, the availability of information on cycle routes, and availability of cycle parking at the workplace, are better – 52% and 66% of cyclists respectively rate these as 'good' or 'very good'
- Among those considering taking up cycling, concern about safety is the most deterring factor for 79% (compared with 10% 'concerns about fitness' or 'concerns about cycling ability')
- As seen in 2012, cyclists actually feel safer when cycling 'in traffic' than when on 'busy roads' in general, perhaps relating to the speed of vehicles on busy roads
 - 89% of regular cyclists and 75% of occasional cyclists said they felt safe cycling in traffic
 - Whereas only 47% of regular and 33% of occasional cyclists felt safe on busy roads
 - However, the proportion of both regular and occasional cyclists to feel safe on 'busy roads' has increased in 2013



Two thirds of cyclists rate the availability of cycle racks at their work-place as good, falling to a third when considering facilities near their home

Rating of cycle rack facilities



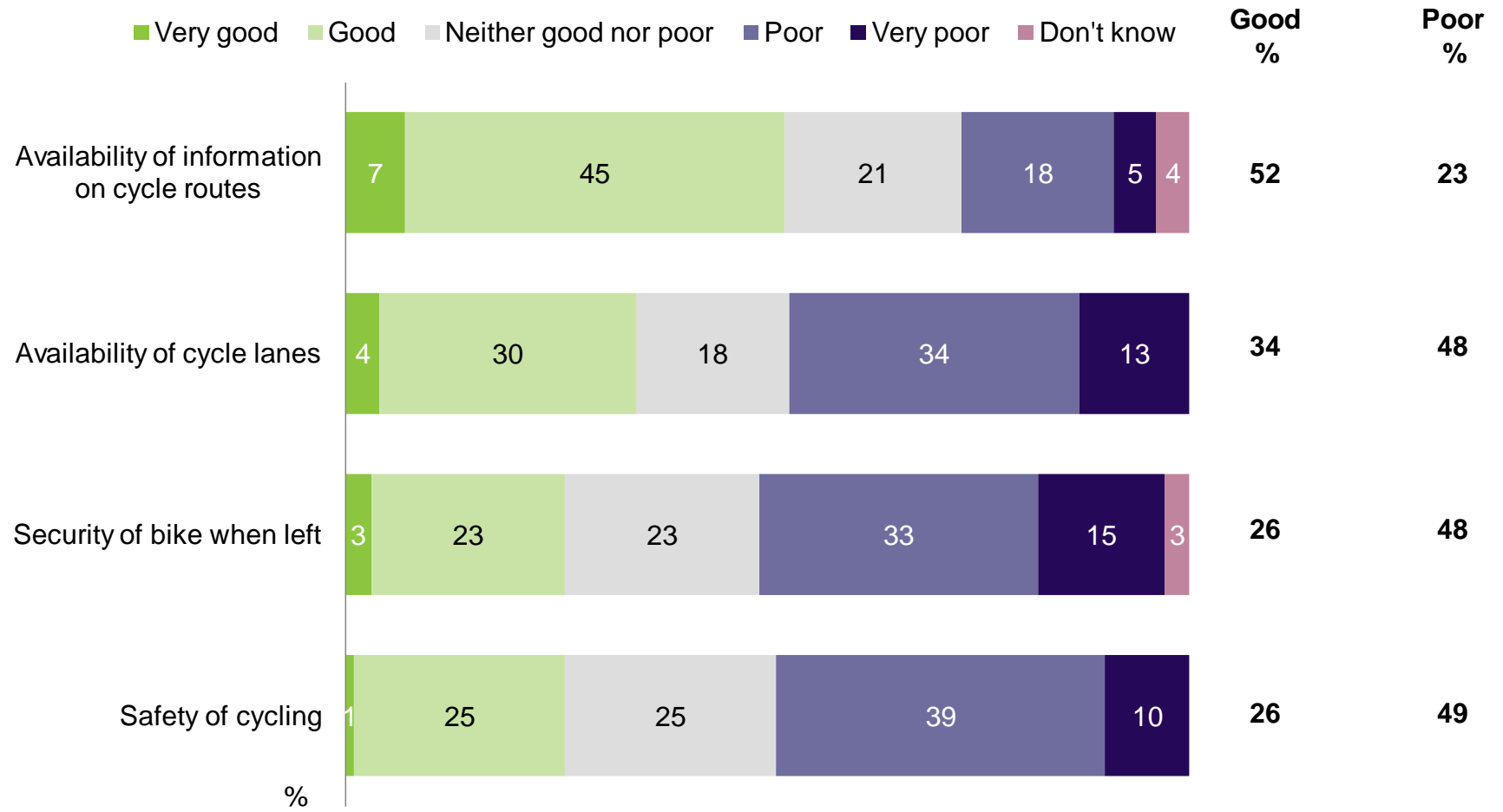
A2: How would you rate the following aspects of cycling in London?

Base: All cyclists (532)



Half of cyclists rate the amount of information on cycle routes as good; however the availability of cycle lanes, security of bike when left, and safety when cycling are all rated as poor by half

Ranking of potential deterrents



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

Base: All cyclists (532)



Cyclists are less likely to rate the availability of information on cycle routes, or the safety of cycling, as ‘good’ in 2013; however there has been an increase in the proportion rating bike security as good

Ranking of potential deterrents (trend)

	Good		Poor	
	2013	2012	2013	2012
Availability of information on cycle routes	52	57	23	21
Safety of cycling*	26	32	49	39
Security of bike when it is left	26	17	48	58

* in 2012, “safety of cycling in the area”



Significantly lower than 2012



Significantly higher than 2012

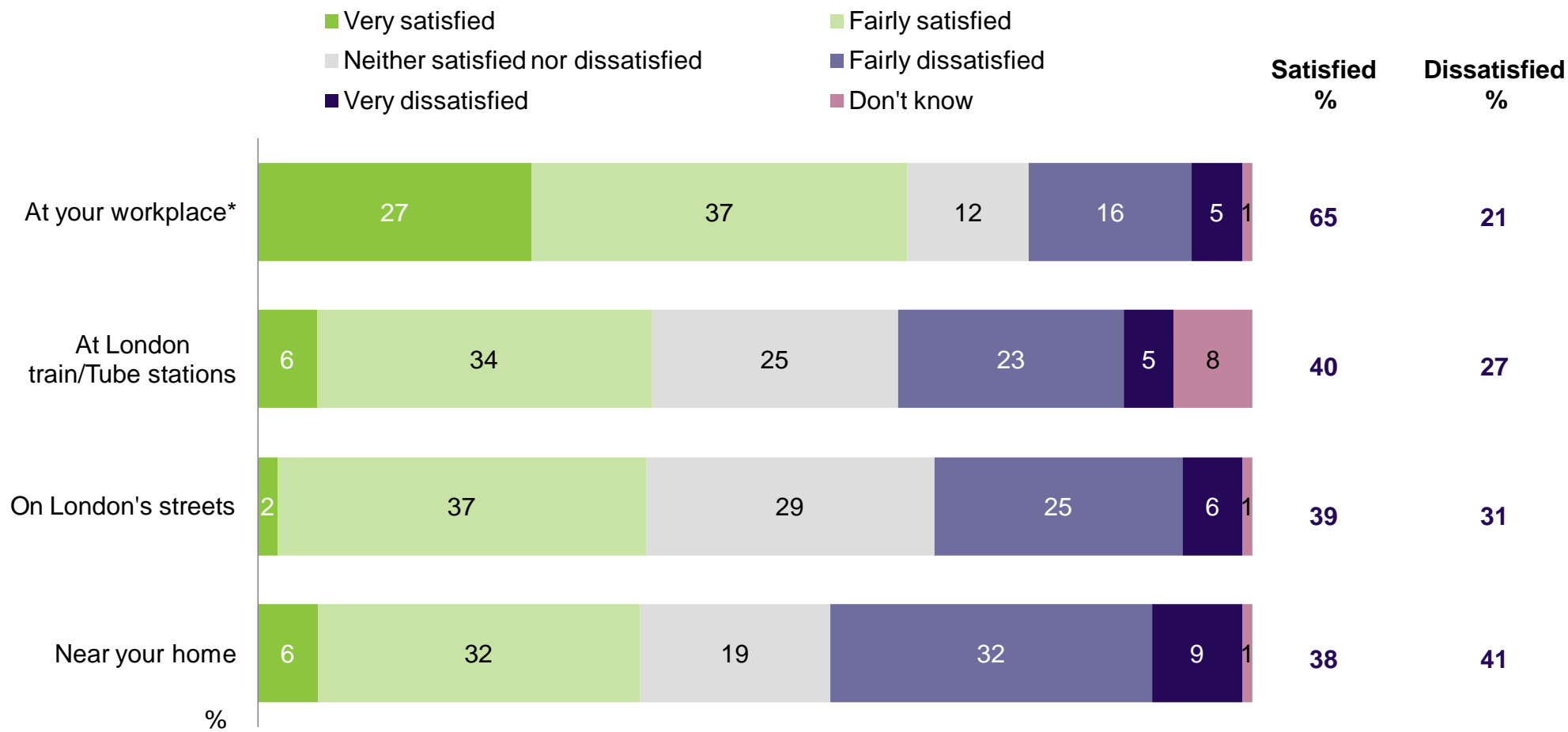
A2: How would you rate the following aspects of cycling in London?

Base: 2013: all cyclists (532); 2012: all cyclists within the last year (505)



Satisfaction with cycle parking facilities is highest at the workplace (65%), falling to 38% when considering facilities near Londoner's homes

Satisfaction with cycle parking facilities at different locations



* excluding 'not applicable'

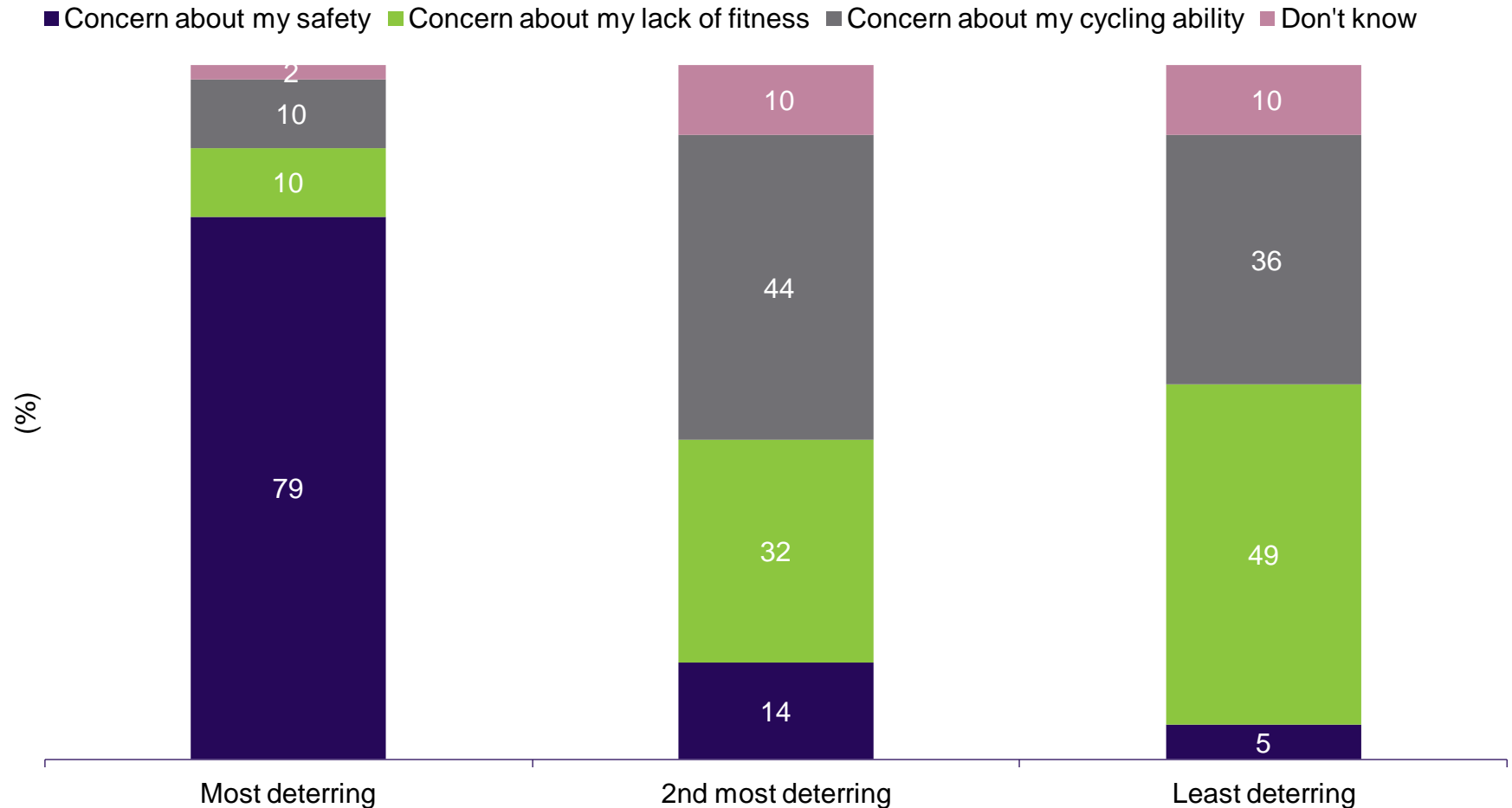
A3: How would you rate your level of satisfaction with the parking facilities for bicycles in London?

Base: All cyclists (532)



Safety concerns are far more likely to be the key deterrent than concerns about lack of fitness or cycling ability

Ranking of key deterrents



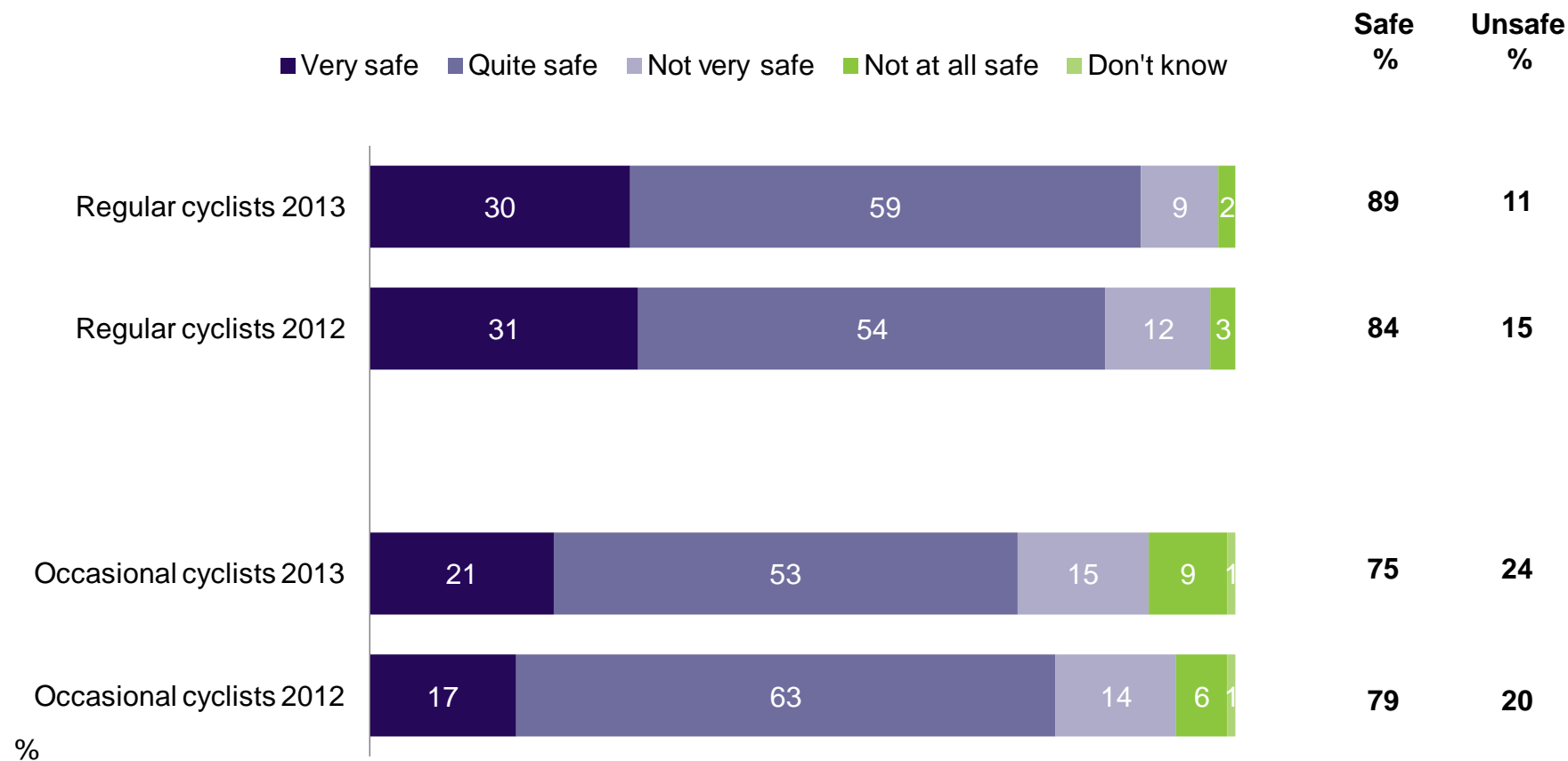
E8: Could you please rank the following one to three in terms of the extent to which they deter you?

Base: Pre-contemplation, contemplation, preparation, and lapsed non-cyclists (755)



Regular cyclists are more likely to feel safe in traffic than occasional cyclists; no significant change year on year

Feeling of safety cycling in traffic



No significant differences compared with 2012

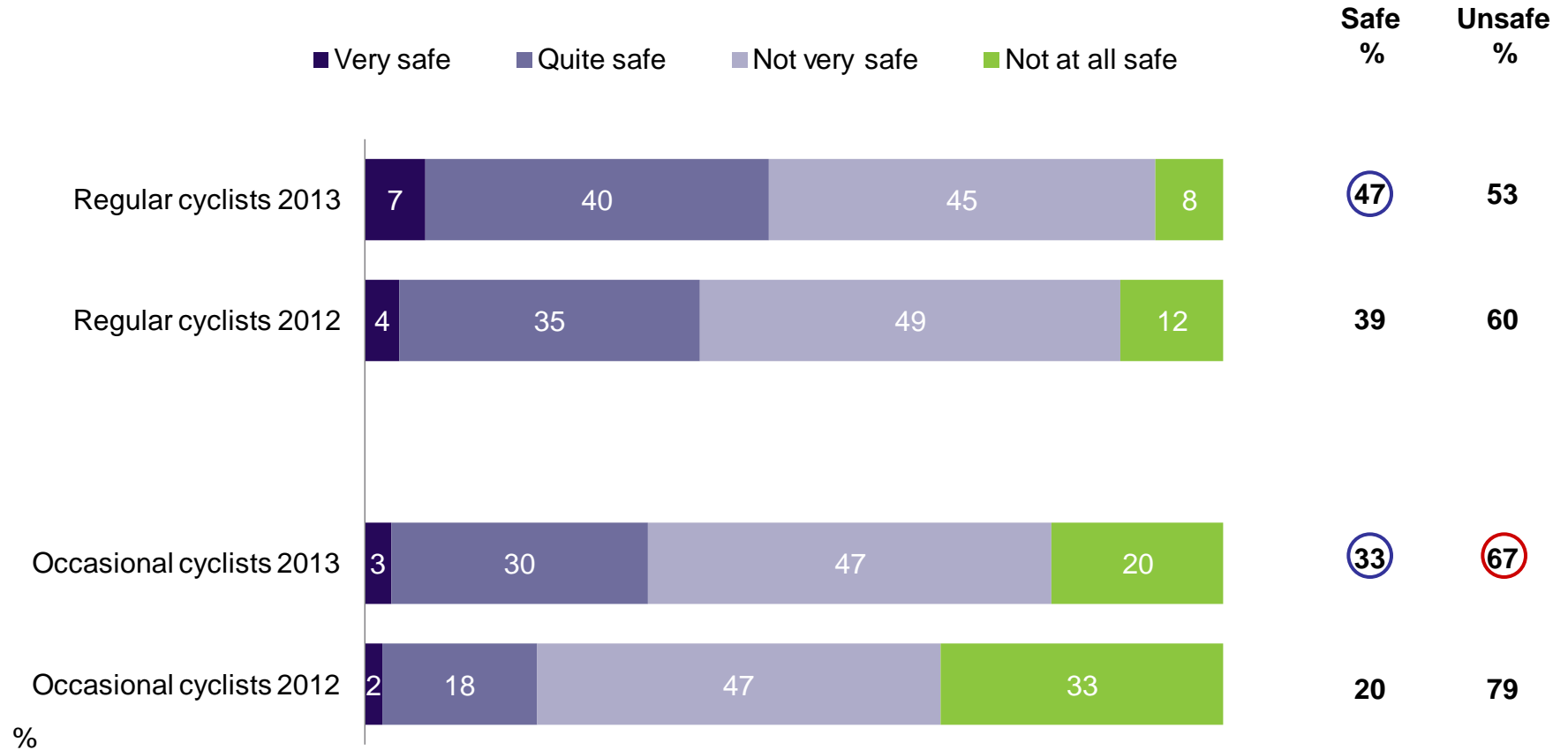
K6: Thinking about cycling in London, how safe on London's roads do you feel cycling in traffic ?

Base: Regular cyclists (2013: 329, 2012: 292), occasional cyclists (2013: 203, 2012: 213)



Regular cyclists are more likely to feel safe on busy roads than occasional cyclists; confidence for both groups has increased in 2013

Feeling of safety cycling on busy roads



 Significantly lower than 2012

 Significantly higher than 2012

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

Base: Regular cyclists (2013: 329, 2012: 292), occasional cyclists (2013: 203, 2012: 213)



Initiatives



→ Summary of initiatives

This section looks at various initiatives in place to promote and facilitate greater cycling in London. These are:

- Barclays Cycle Hire, which was launched in July 2010 and provides access to hire bikes for Londoners and visitors from docking stations located around central London
 - There have been recent extensions of the scheme to areas of East and South London
- Barclays Cycle Superhighways, which are a series of cycle routes running from outer to central London
 - The first two were opened in summer 2010, two more opened in summer 2011
 - Eight more routes will be active by 2015
- Cycling events, such as the Tour of Britain London leg (an international cycling competition similar to the Tour de France), and Sky Ride (which is open to all)
 - Olympic and Paralympic events were also covered in the research this year
- Cycle training, which is provided by London boroughs in conjunction with TfL
 - There are also other cycle training schemes (eg those organised through employers)

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



Barclays Cycle Hire





Barclays Cycle Hire

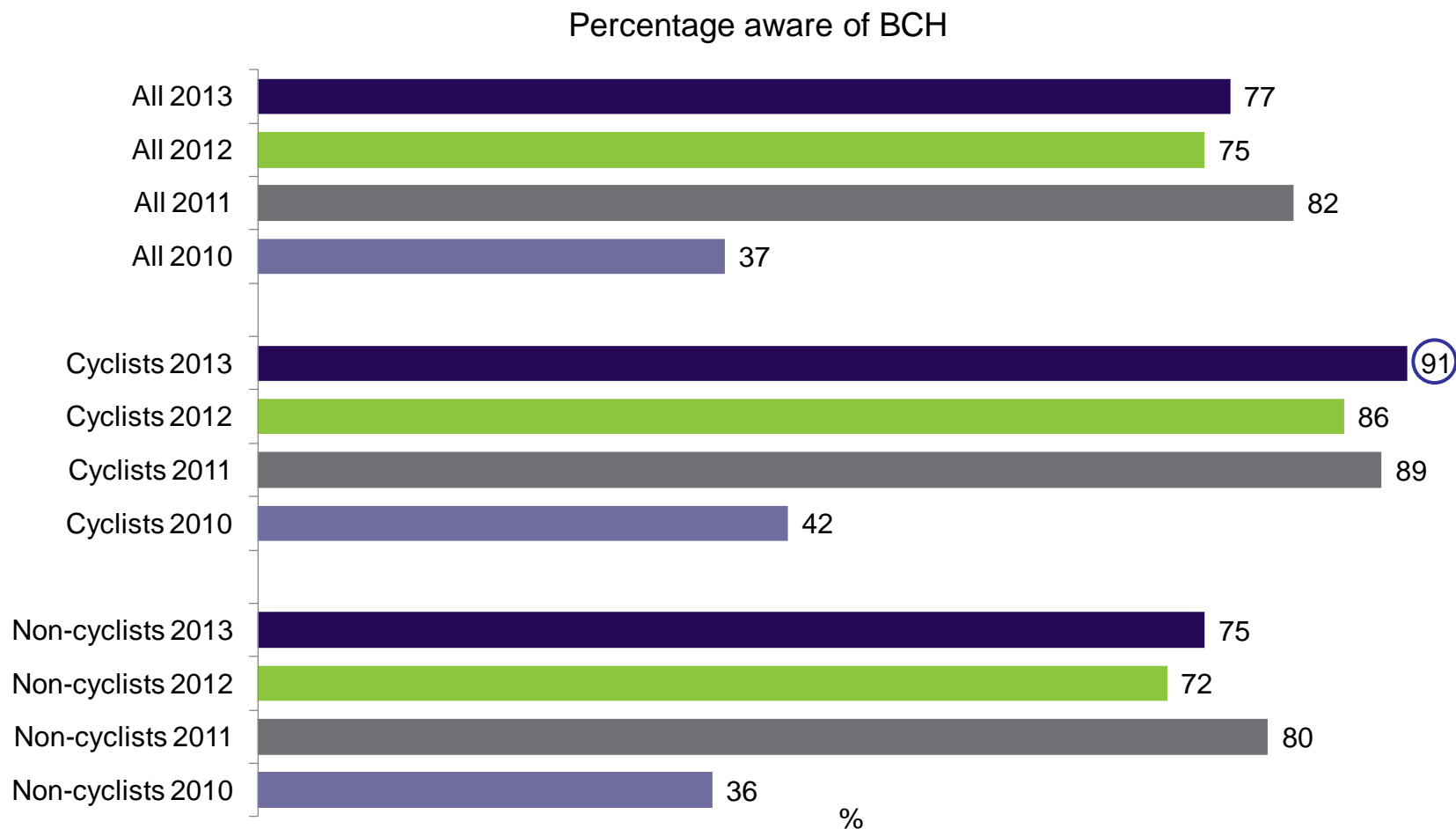
- Three quarters of Londoners (77%) are aware of Barclays Cycle Hire – level with 2012 (75%)
 - Cyclists are most likely to be aware of Barclays Cycle Hire, and awareness among this group has increased this year (from 86% to 91%)
- Use of Barclays Cycle Hire has steadily grown and now stands at 10%, up from 7% in 2012
 - Of those who have not used Barclays Cycle Hire, only a quarter (26%) say they are likely to use it in the future
- 40% of users report cycling more as a result of Barclays Cycle Hire
 - 54% of intended users think it will increase the amount they intend to cycle
- Leisure remains the most common use (and intended use) of Barclays Cycle Hire
 - 67% of users say they use the bikes for leisure, while 74% of intended users think they will hire a bike to use for leisure purposes
 - Intended users claim that they will use Barclays Cycle Hire for a wider range of journey types than current users
- 65% of users, and 46% of non-users, are aware of the Eastern and/or Southern expansion of Barclays Cycle Hire
 - A third of non-users say they would use Barclays Cycle Hire if it was available in their area





Three quarters (77%) of Londoners are aware of BCH, rising to 91% of cyclists – a significant recovery after a fall last year

Awareness of Barclays Cycle Hire



○ Significantly higher than 2012

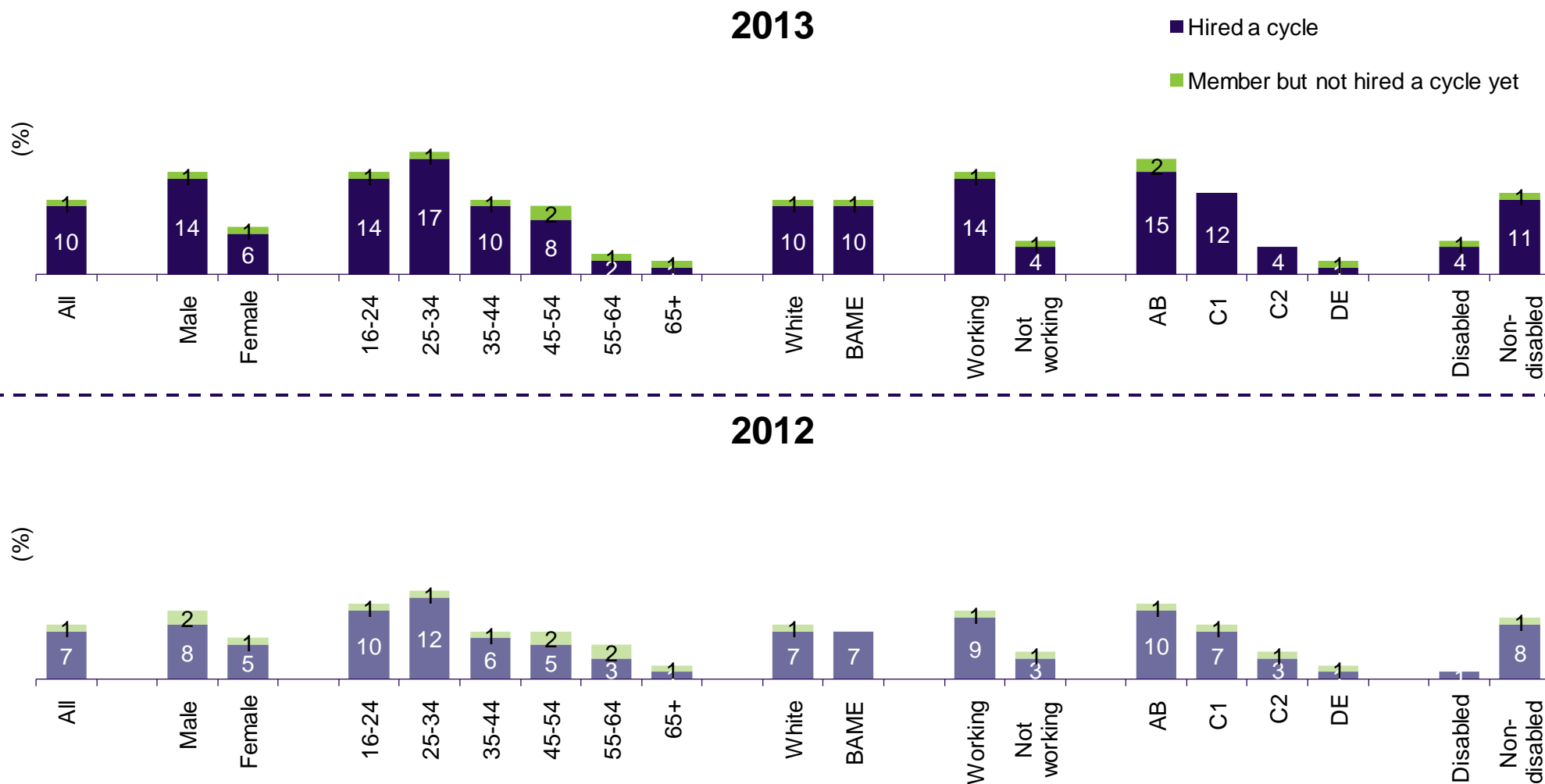
N1: Are you aware of the Barclays Cycle Hire scheme?

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



1 in 10 Londoners have used a BCH bicycle, with steady growth in usage seen among many groups over the last year

Use of Barclays Cycle Hire



N2: Have you used Barclays Cycle Hire?

Base: all 2013 (1,373), 2012 (1,326)

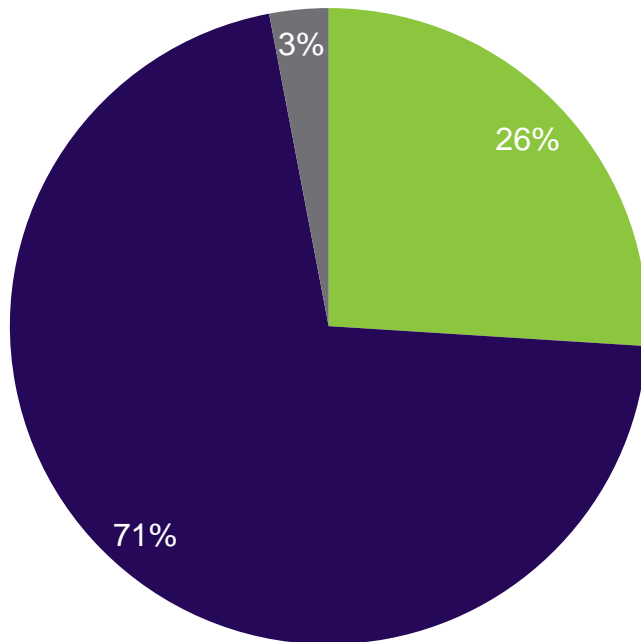


A quarter (26%) of non-users intend to hire a BCH bicycle in the future and most use (or intend to use) the bicycles less than once a month or aren't sure

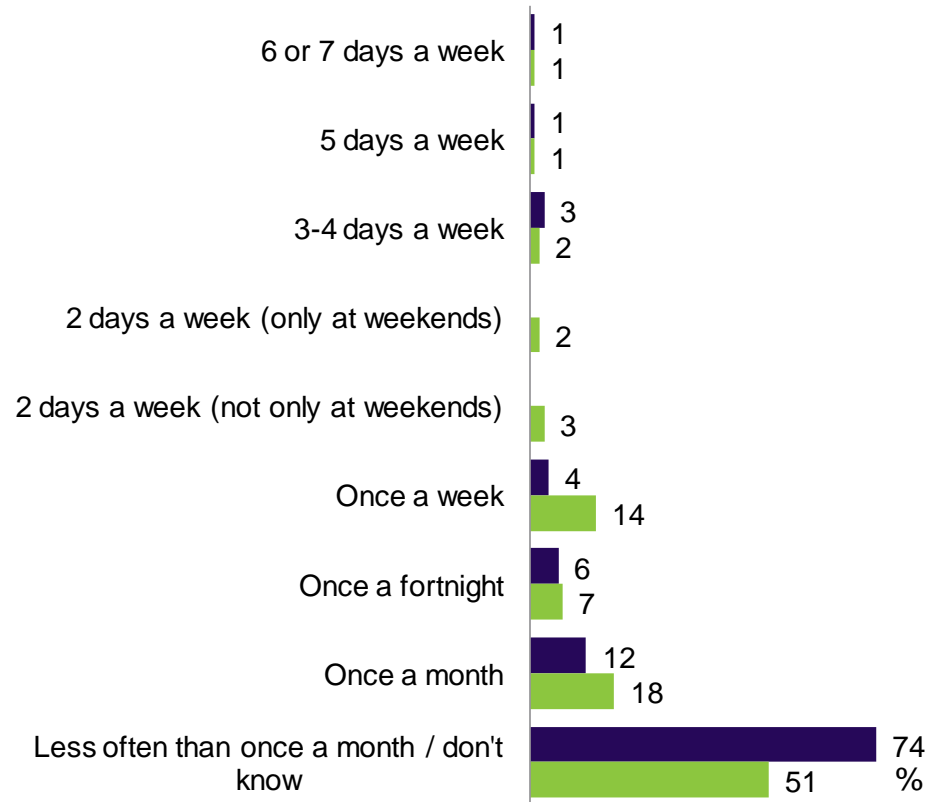
(Intended) frequency of use

Whether intended to use Barclays Cycle Hire in the future

■ Yes ■ No ■ Don't know



Frequency of using Barclays Cycle Hire



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

N4: How often do you (intend to) use Barclays Cycle Hire? Base: Those who used or intend to use Barclays Cycle Hire (138/294)

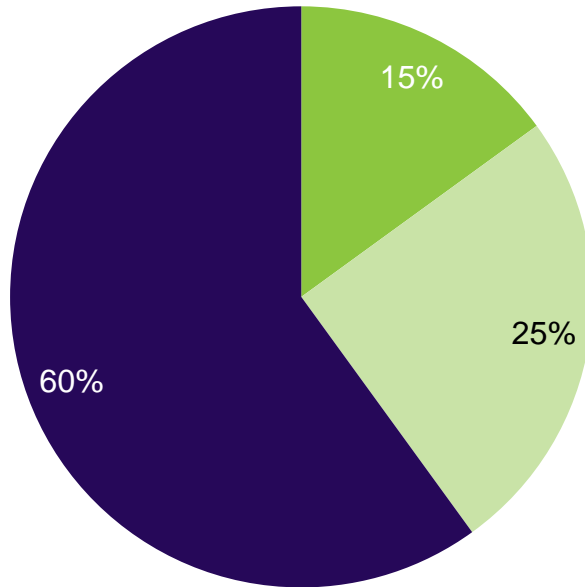


40% of users report cycling more as a result of BCH, with 54% of intended users believing it will increase their cycling

Impact of BCH on (intended) cycling

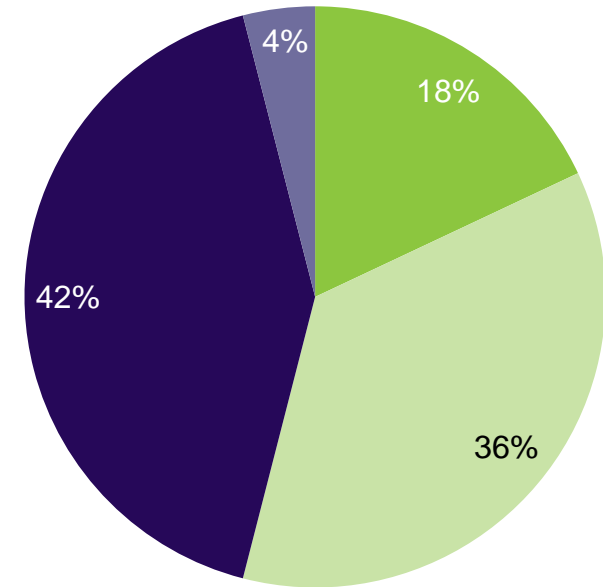
Current users

■ Yes, a lot ■ Yes, a little ■ No



Intended users

■ Yes, a lot ■ Yes, a little ■ No ■ Don't know



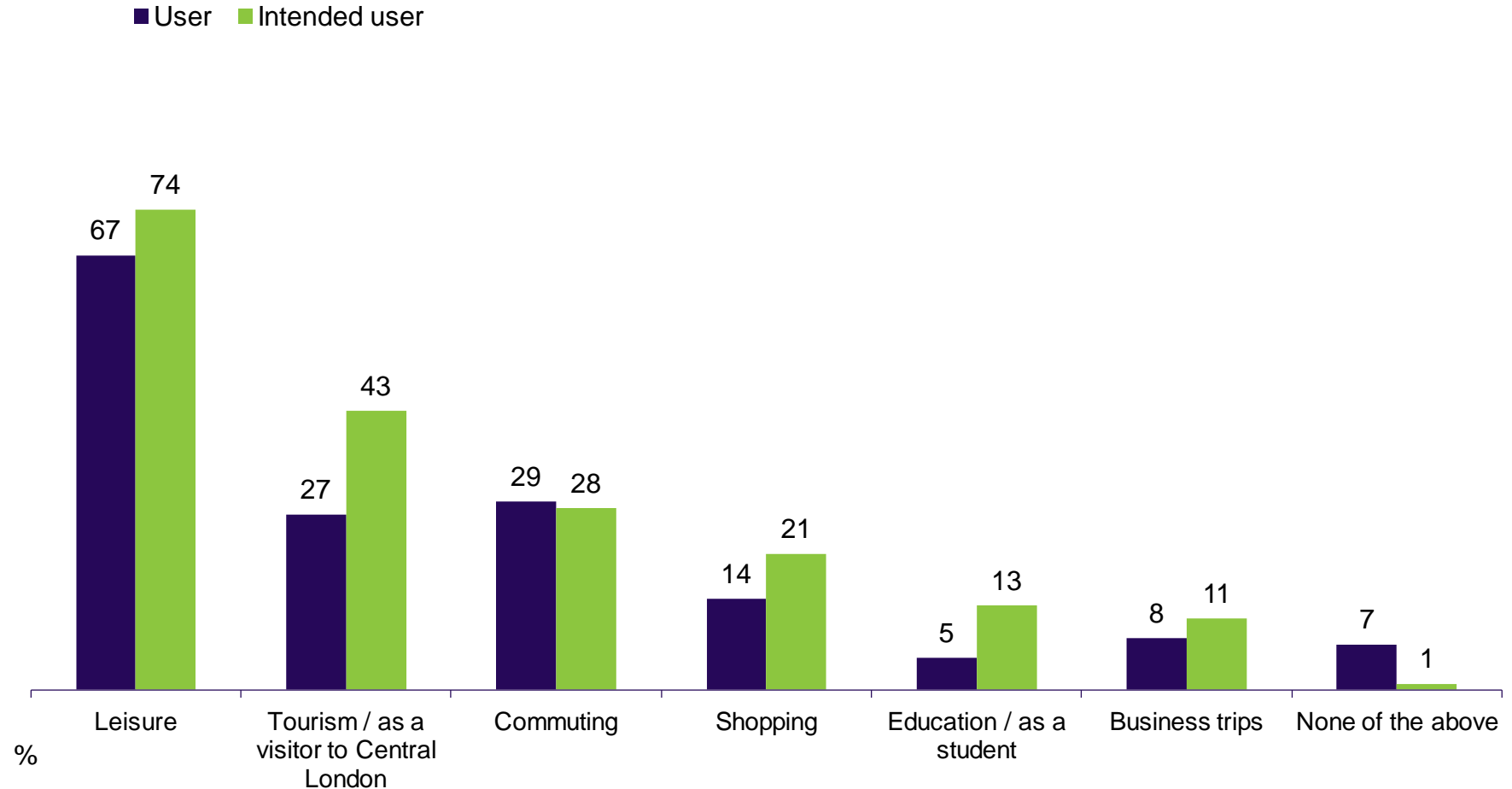
N5: Has the Barclays Cycle Hire scheme caused you to increase the amount that you (intend to) cycle?

Base: all users (current: 138; intended: 294)



The most common actual or intended use of BCH is for leisure. Intended users claim they will use BCH for a wider range of journey purposes than current users report

(Intended) trip use for Barclays Cycle Hire



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

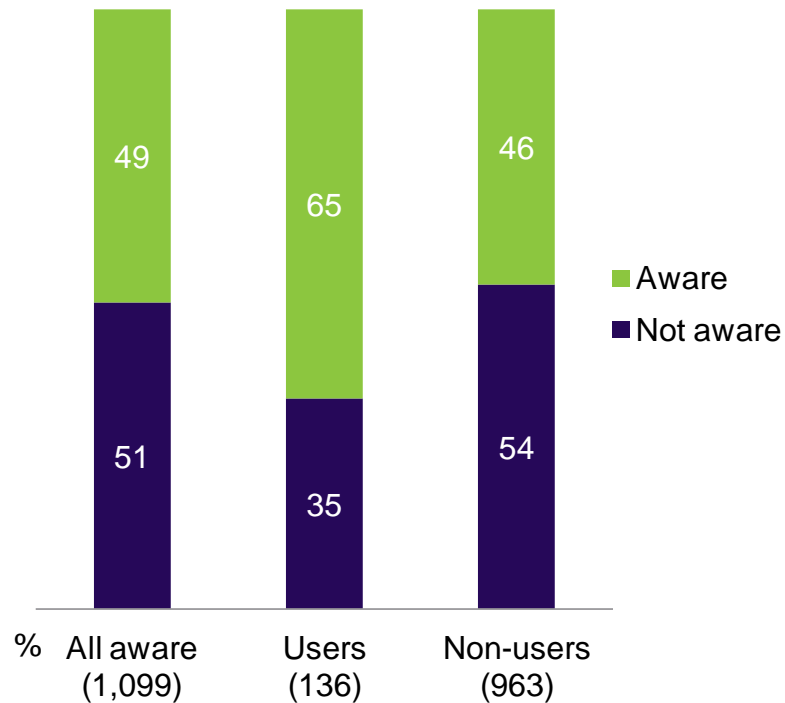
Base: all users (user: 138; intended user: 294)



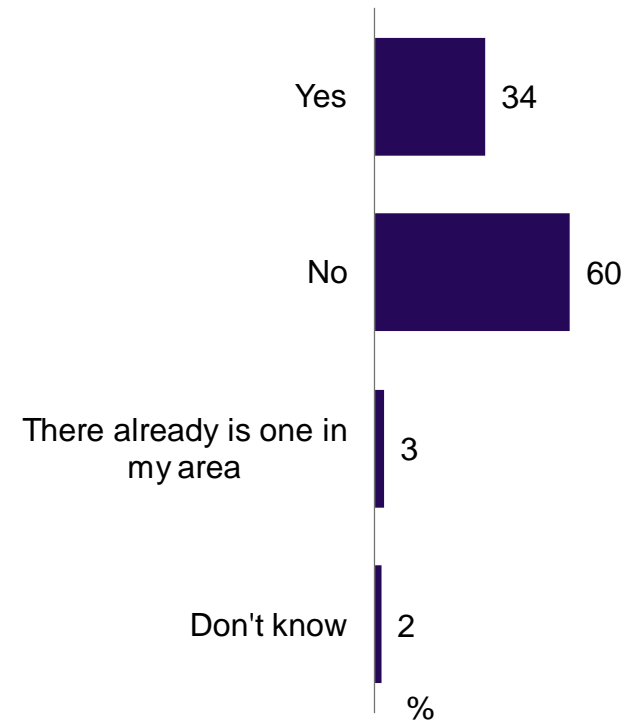
Most BCH users are aware of the expansion zones in the East and South. Among non-users, a third say they would use the scheme if it was in their area

Eastern and Southern expansion area and potential use

Awareness of Eastern and Southern expansion areas



Whether would use Barclays Cycle Hire if in your area



N7: Were you aware that the area covered by Barclays Cycle Hire is expanding from Central London to include more of East London and South London? Base: Those aware of Barclays Cycle Hire (1,099)

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



Barclays Cycle Superhighways





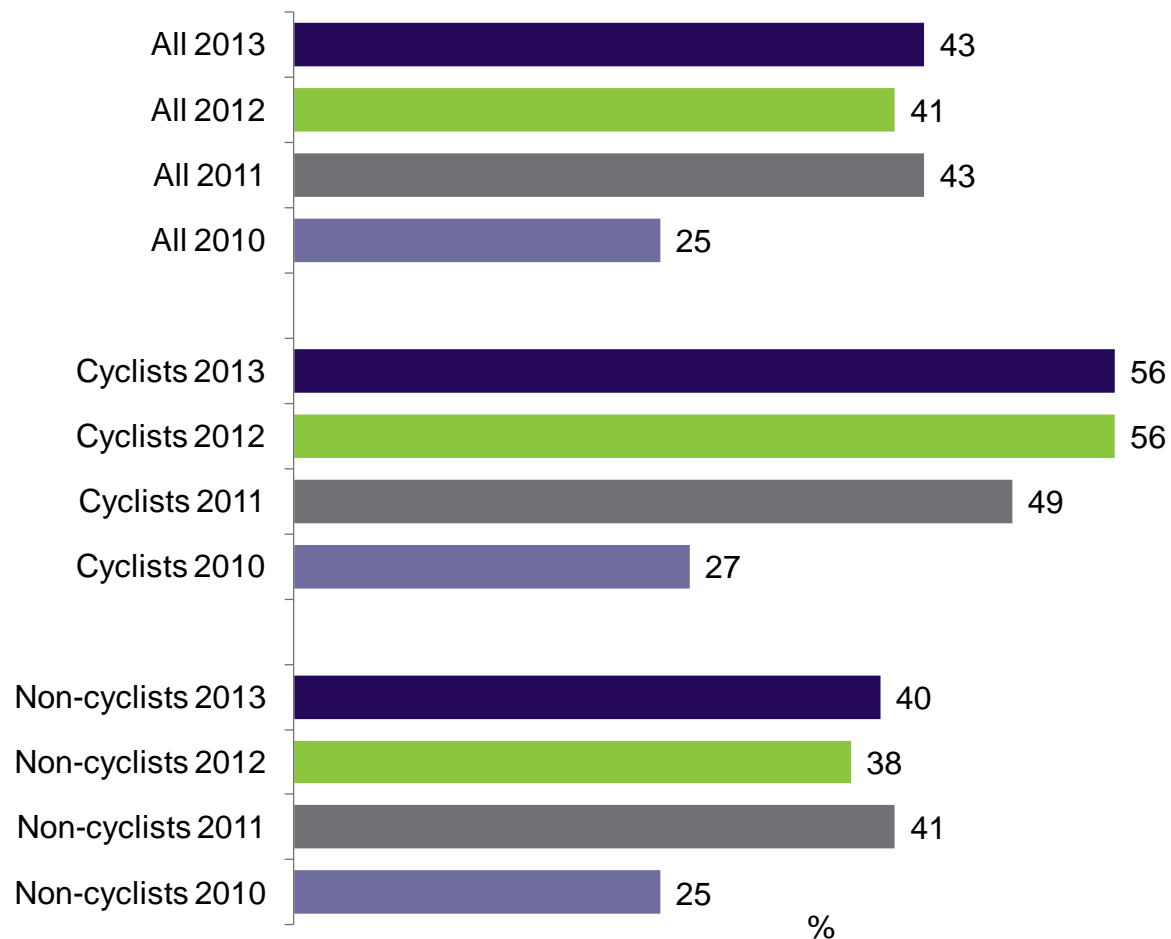
Barclays Cycle Superhighways

- 43% of Londoners are aware of Barclays Cycle Superhighways (BCSH), consistent with findings from 2012 (41%)
 - As with Barclays Cycle Hire, awareness is higher among cyclists (56%) than non-cyclists (40%)
 - There remains some confusion between Barclays Cycle Superhighways and Barclays Cycle Hire
- 15% of those who are aware of them have used a Barclays Cycle Superhighway, while 22% of those who have not used one (but are aware of them) intend to use them at some future point
 - Intention to use is highest amongst young people (16-24), of whom 41% intend to use BCSH
- Only a small percentage of BCSH users say that they have increased their cycling as a result of the BCSH lanes
 - Among intended users, just over half think the lanes would increase their level of cycling
 - Leisure and commuting are the main (intended) uses of BCSH
- Of all those aware of BCSH, 28% are aware that there will be eight further routes (rising to 42% of current users)
 - 47% of non-users who currently do not intend to use BSCH say they would use it if a route were installed in their local area
- Two thirds of users are satisfied with BCSH
 - Satisfaction with the availability of BCSHs (among those aware of them) is lower (33%, though there is also low dissatisfaction – more are neither satisfied nor dissatisfied)



Around two fifths (43%) of Londoners are aware of Barclays Cycle Superhighways, rising to 56% of cyclists

Awareness of Barclays Cycle Superhighways



No significant differences compared with 2011

M1: Are you aware of Barclays Cycle Superhighways?

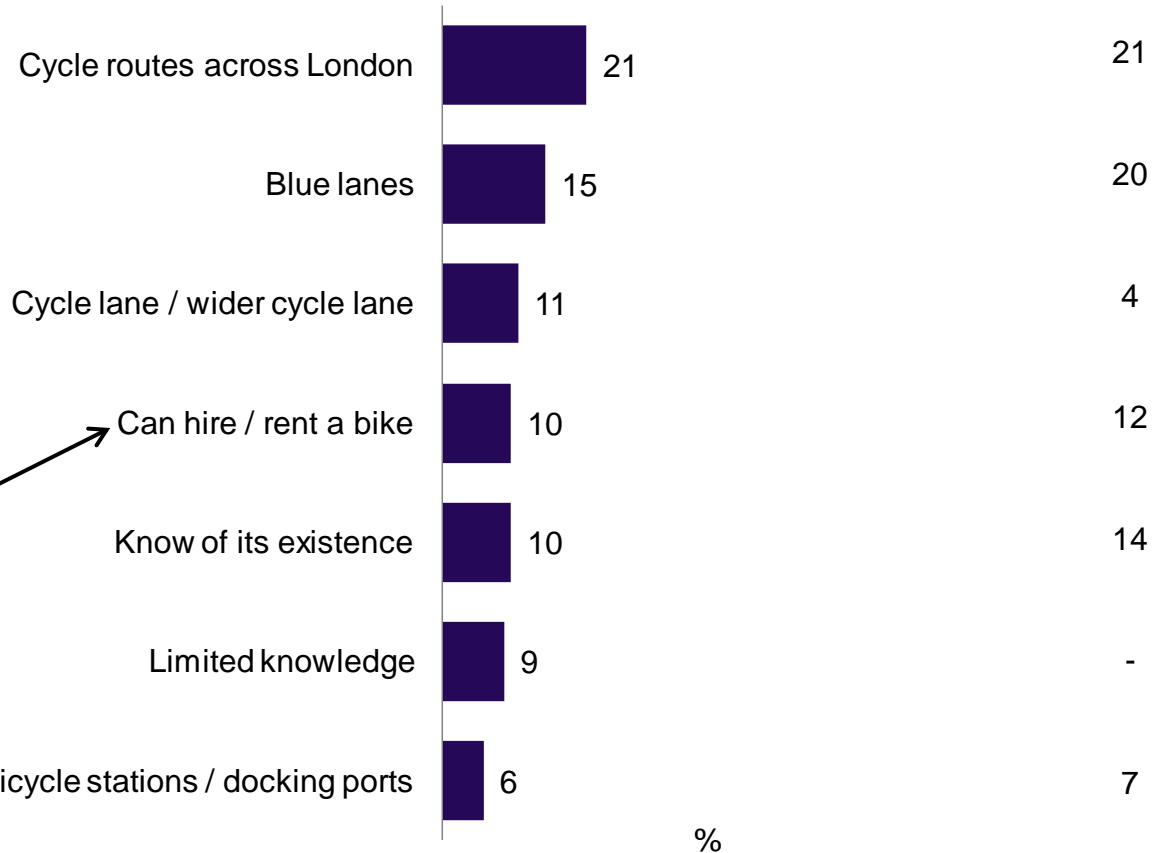
Base: All – 2013 (1,373) 2012 (1,326); 2010-2011 (c.1,000); Cyclists – 2013 (532) 2012 (505) 2010-2011 (c.170); Non-cyclists – 2013 (841); 2012 (821) 2010-2011 (c.870)



Among those claiming to be aware of Barclays Cycle Superhighways, there remains some confusion with Barclays Cycle Hire

Understanding of Barclays Cycle Superhighways

2012
(Base: 590)



Still some
evidence of
false recall

Mentioned over 5% shown

M2: What do you know about the Barclays Cycle Superhighways?

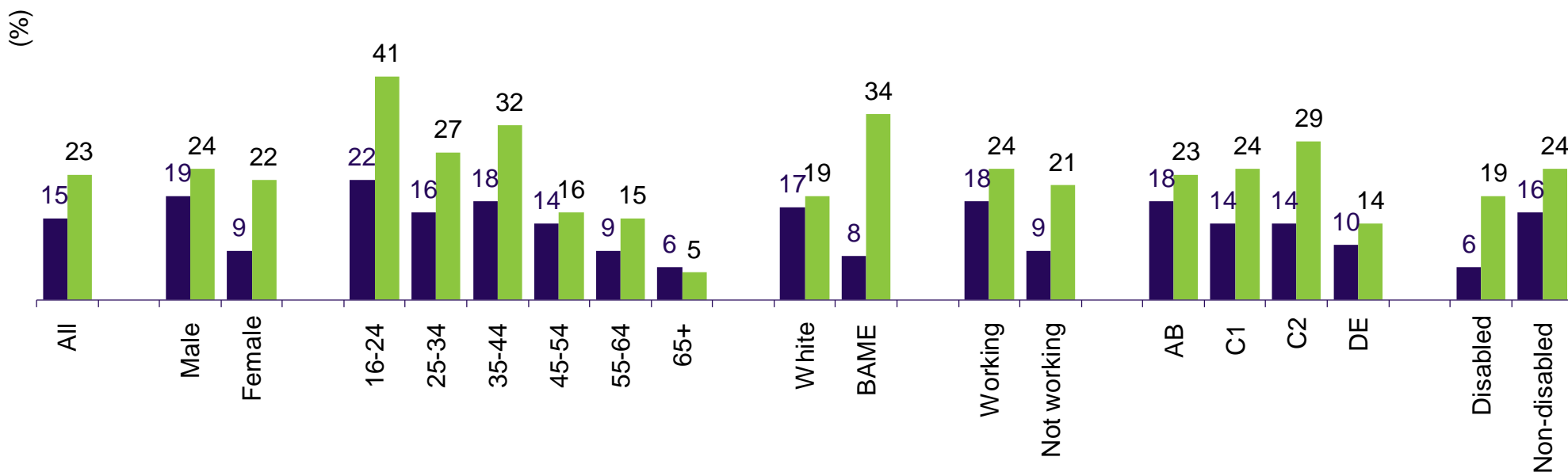
Base: those aware of Barclays Cycle Superhighways? (616)



Of those aware of BCSH, 15% have used them; amongst aware non-users, a fifth intend to use them (rising to 41% for 16-24 year olds)

Use of Barclays Cycle Superhighways

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



M3: Do you intend to use the Barclays Cycle Superhighways? Base: all aware but not used (487)

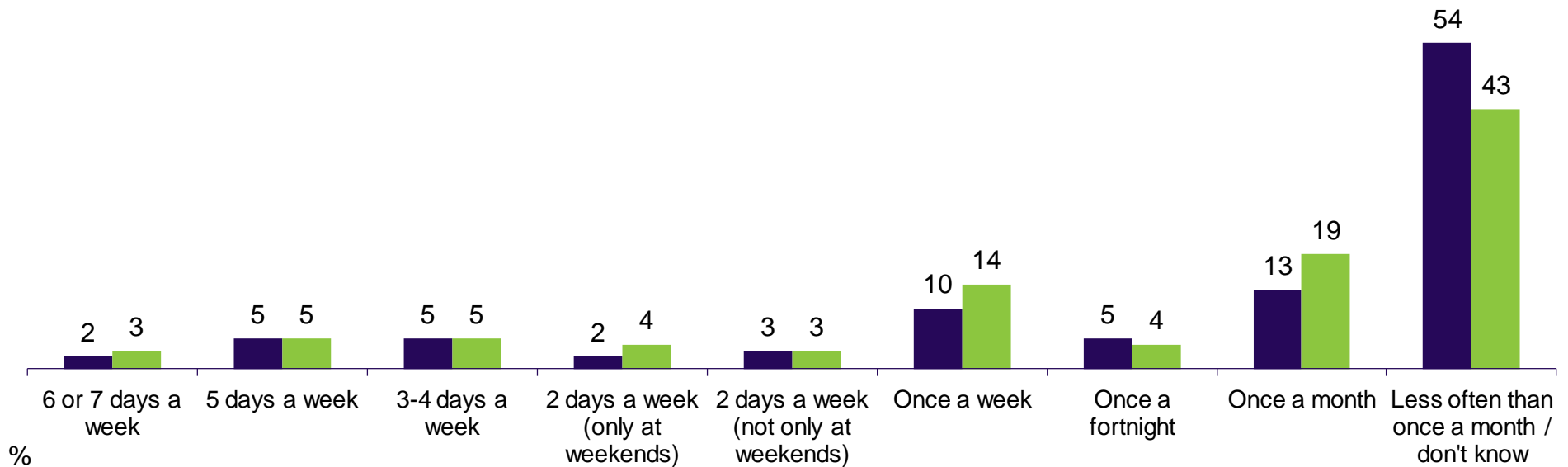
M4: Have you used the Barclays Cycle Superhighways? Base: all aware (590)



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

(Intended) frequency of use for Barclays Cycle Superhighways

■ User ■ Intended user



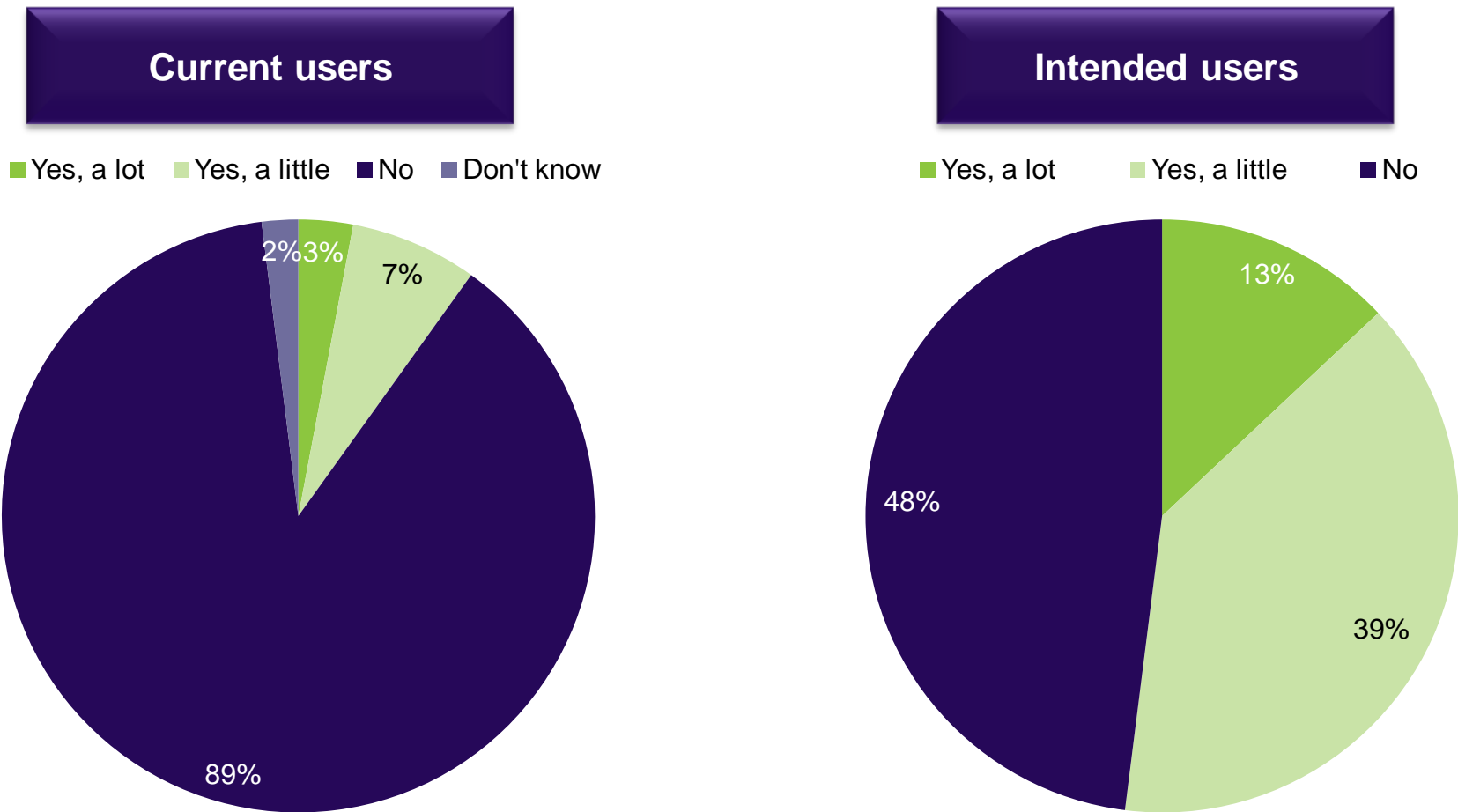
M5: How often do you (intend to) use Barclays Cycle Superhighways?

Base: all users (user: 129; intended user: 120)



Only a small percentage of BCSH users say that they have increased their cycling as a result of the BCSH lanes; among intended users, just over half think the lanes would increase their level of cycling

Impact of BCSH on (intended) cycling

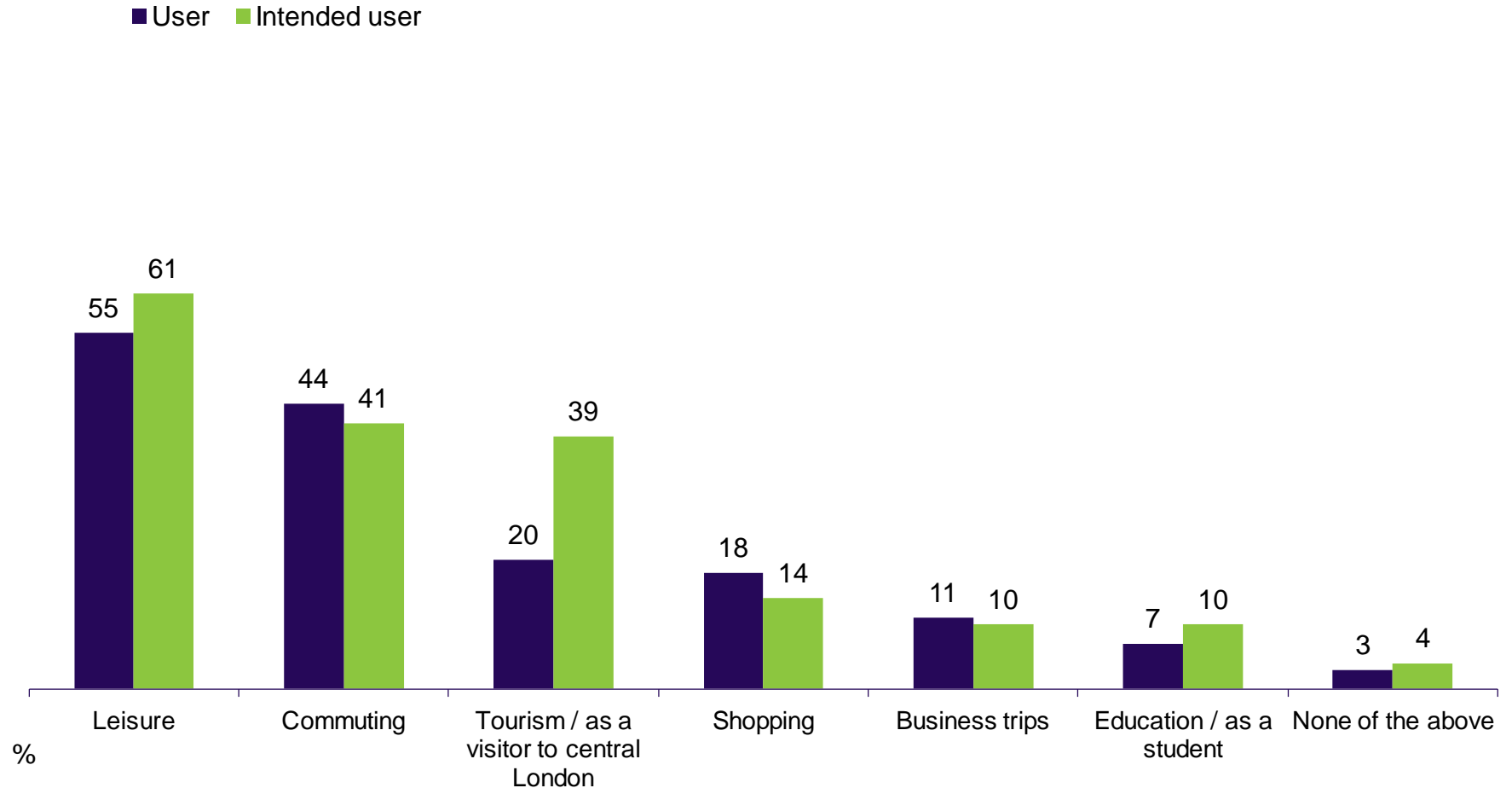


M6: Have the Barclays Cycle Superhighways caused you to increase the amount that you (intend to) cycle?
Base: all users (129 current, 120 intended)



Leisure and commuting are the most common uses and intended uses

(Intended) trip use for Barclays Cycle Superhighways



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

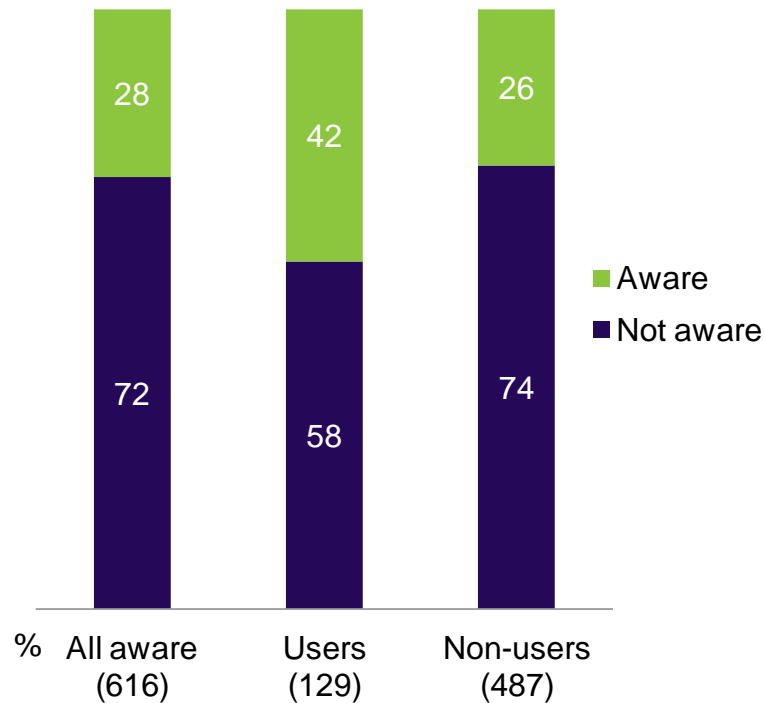
Base: all users and intended users (129 current, 120 intended)



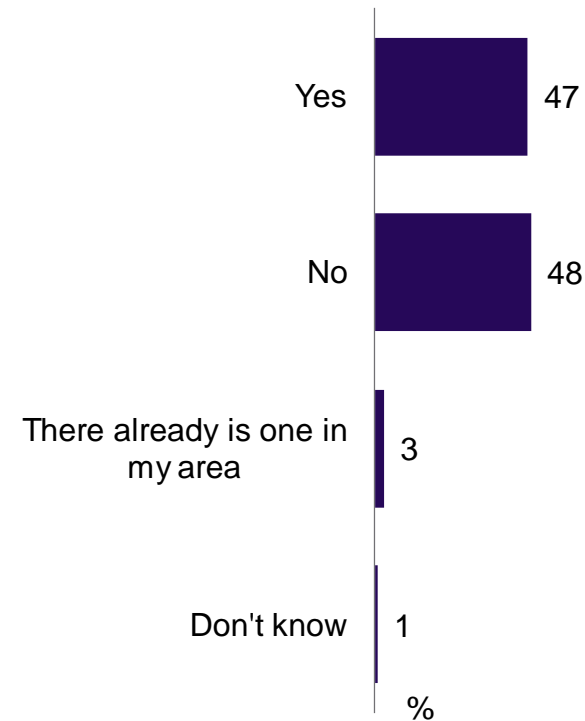
A quarter of those aware of BCSH are aware of their full extent; roughly half of those who have not used a BCSH say they would if there was one in their area

Awareness of BCSHs open, and potential use

Awareness 4 out of 12 BCSHs are currently open



Whether would use BCSH if installed in your local area



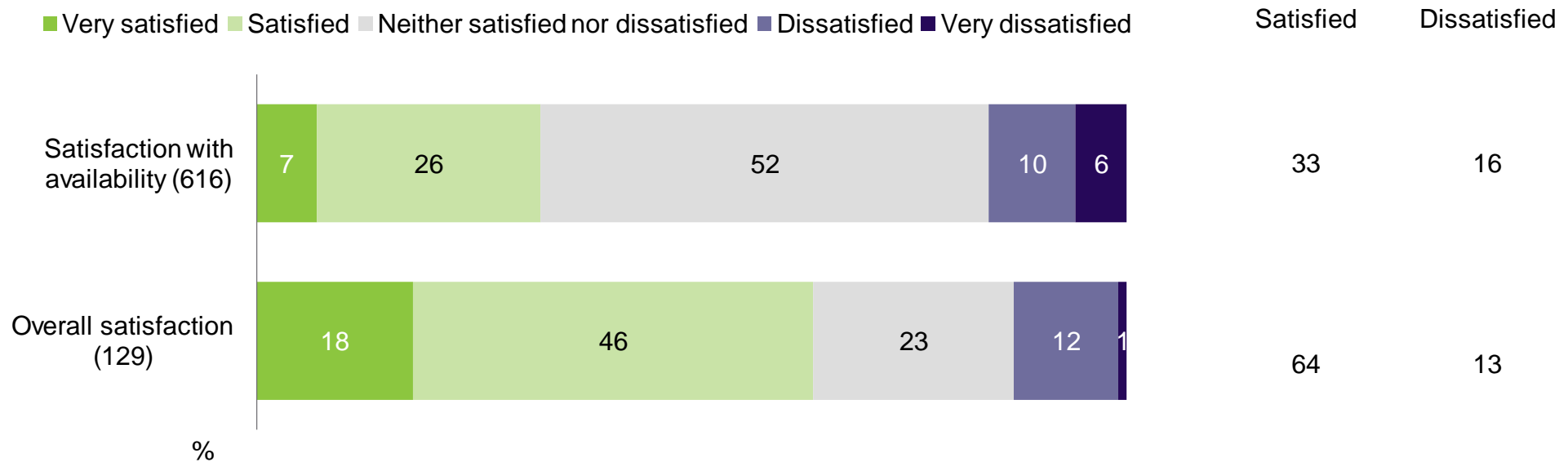
M8: Were you aware that only four out of twelve Barclays Cycle Superhighways have currently been built and that the scheme will be expanded over the coming years? Base: Those aware of Barclays Cycle Hire (616)

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



Two thirds of users are satisfied with Barclays Cycle Superhighways, however, satisfaction with the availability of BCSH (among those aware of them) drops to a third

Satisfaction with Barclays Cycle Superhighways



M3a: How satisfied or dissatisfied are you with the availability of Barclays Cycle Superhighways across London? Base: all aware (616)

M4a: How would you rate your level of satisfaction overall with the Barclays Cycle Superhighways? Base: All users (129)



Cycling events





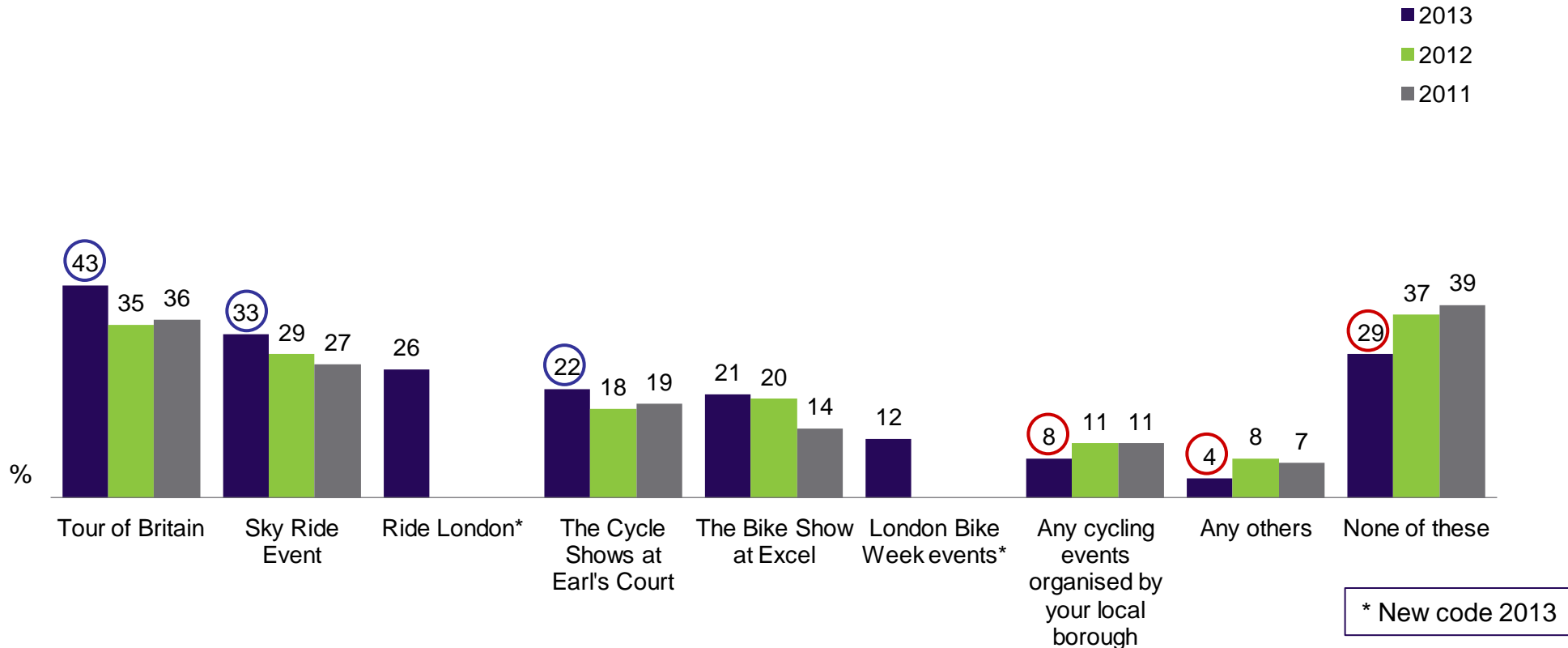
Cycling events

- ➔ Tour of Britain and the Sky Ride Event remain the most commonly recognised cycling events with 43% and 33% aware of them respectively
 - Awareness of both of these events, and the Cycle Shows at Earl's Court, has risen significantly this year
- ➔ As in 2012, a higher proportion of Londoners claim they will attend various cycling events in the future than report attending in the last 12 months
 - 12% say they will attend the Sky Ride Event in the next year, compared with 4% who say they attended last year
 - Expected attendance for Tour of Britain stands at 11% (compared to 2% who say they attended in 2012)
- ➔ Two thirds of Londoners watched at least one Olympic/Paralympic cycling event on television, while 9% attended at least one cycling event
 - 6% of those who had attended or watched an event said they had cycled more as a result – mainly leisure trips or running errands
- ➔ Of those Olympic / Paralympic cyclists covered in the research, Sir Bradley Wiggins was most likely to have inspired Londoners to cycle more



Tour of Britain and Sky Ride remain the most recognised cycling events, with significant increases in awareness of many of the events

Awareness of cycling events



Significantly lower than 2012



Significantly higher than 2012

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

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

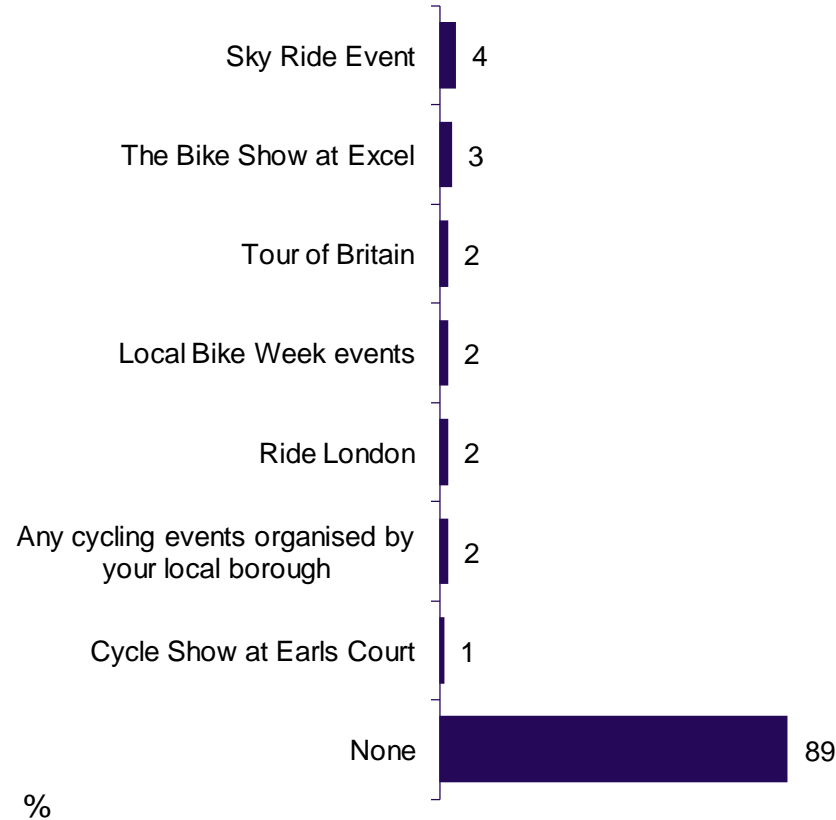


As seen in the past two years, reported future attendance is higher than actual past attendance for most cycling events

Reported attendance of cycling events

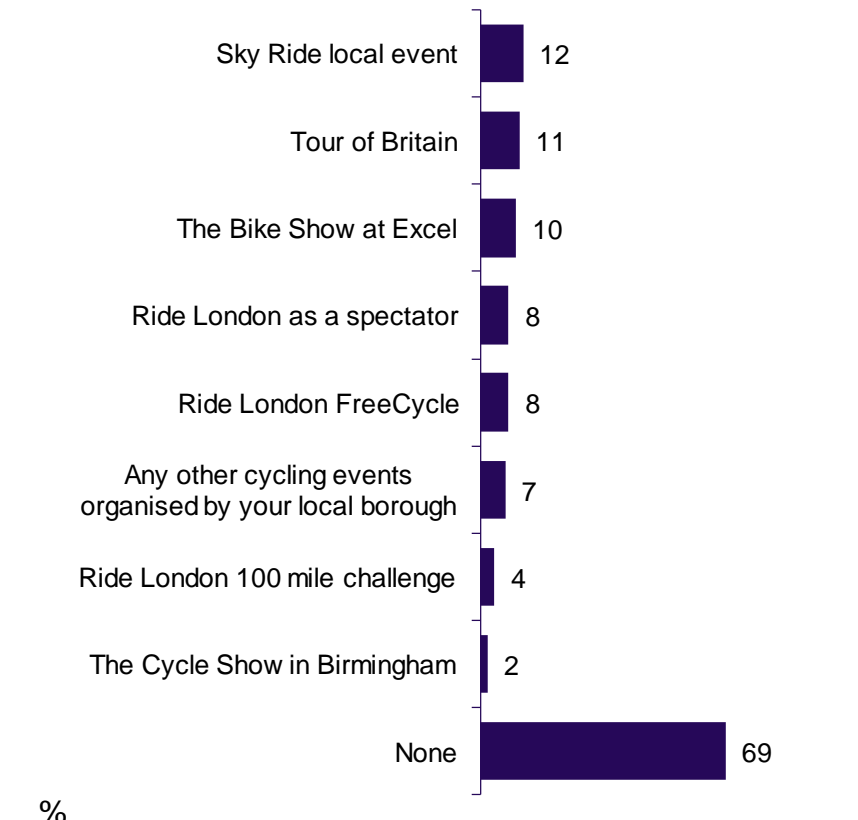
Events attended in last 12 months

Base: All those aware of cycling events (1,032)



Events likely to attend in next 12 months

Base: All those aware of cycling events (1,032)



P2: Which of the following events have you attended in London in the last 12 months?

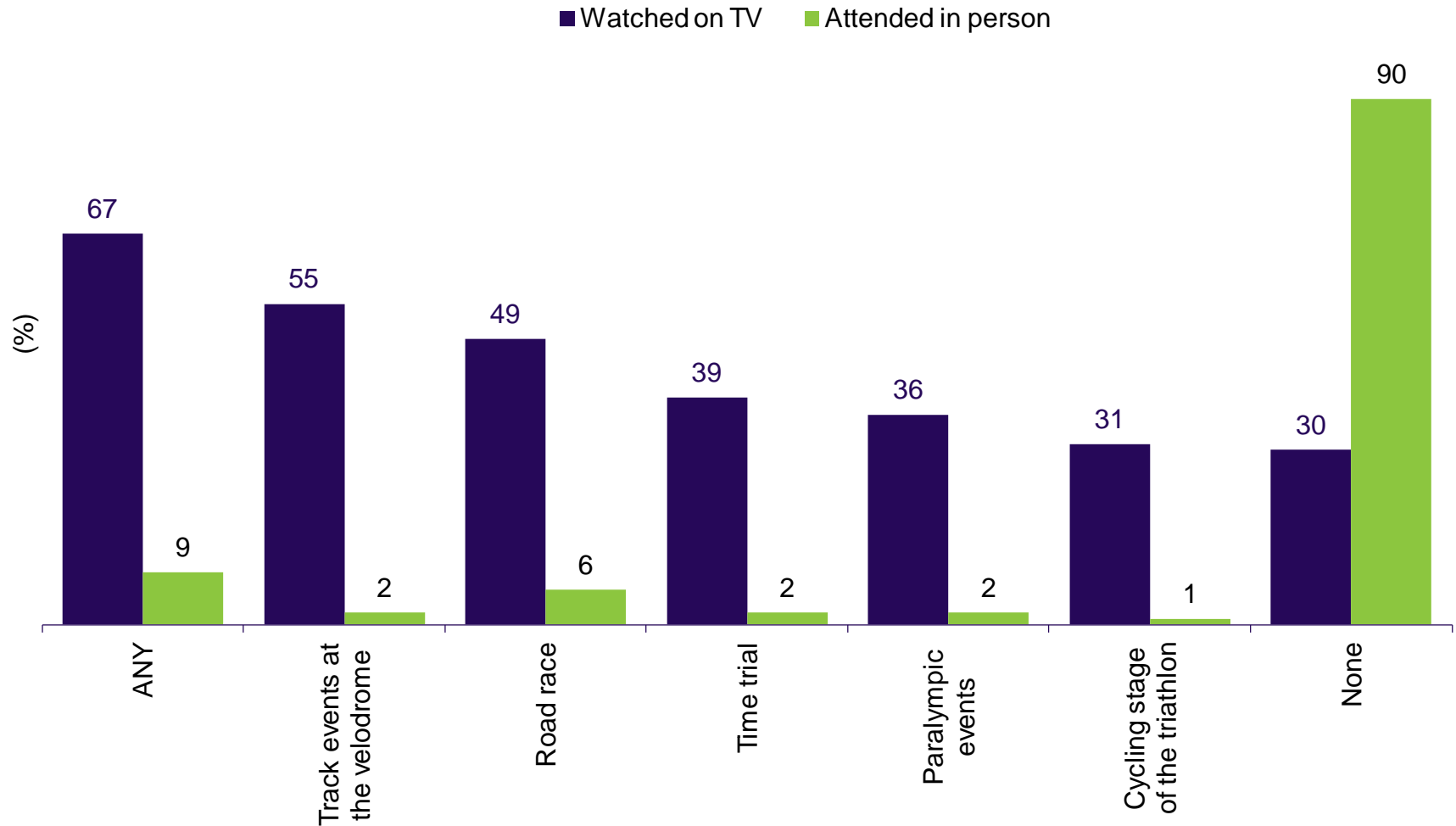
P3: Which of these cycling events are you likely to attend in London in the next 12 months?

Base: All those aware of cycling events



Two thirds of Londoners watched at least one cycling event from the London 2012 games on TV, with 9% having attended an event

Attendance / watching of the Olympic / Paralympic Games



Q2012a/b: Did you [watch on TV / attend] any of the cycling events at the London 2012 Olympic/Paralympic Games?

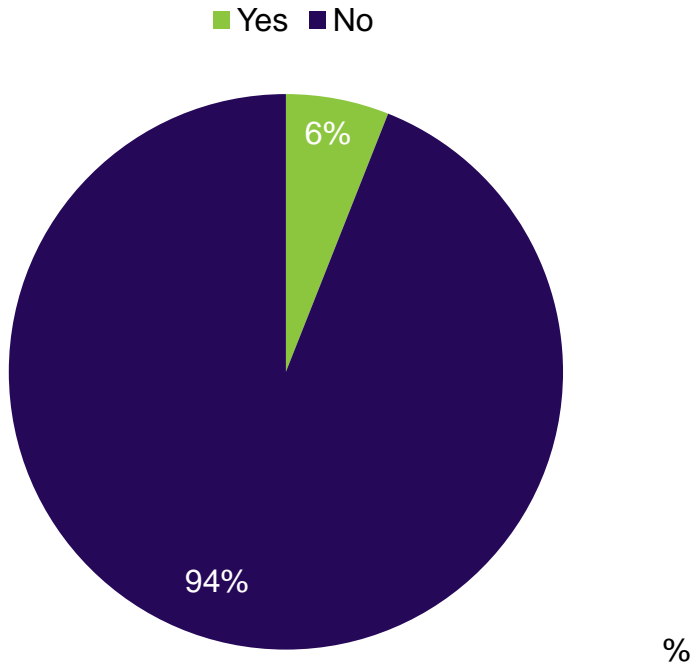
Base: all (1,373)



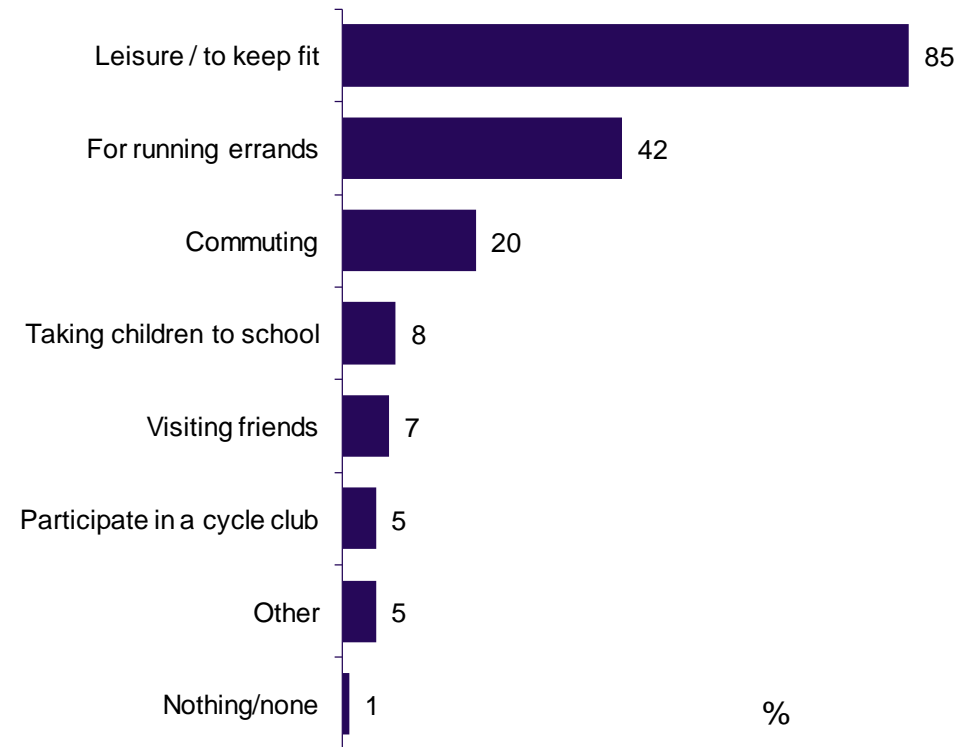
6% of those who attended / watched a London 2012 cycling event said they had cycled more as a result – mainly leisure trips / errands

Cycling more as a result of watching London 2012 cycling events

Cycled more as a result of watching/attending Olympic/Paralympic cycling event



Types of journeys made as a result



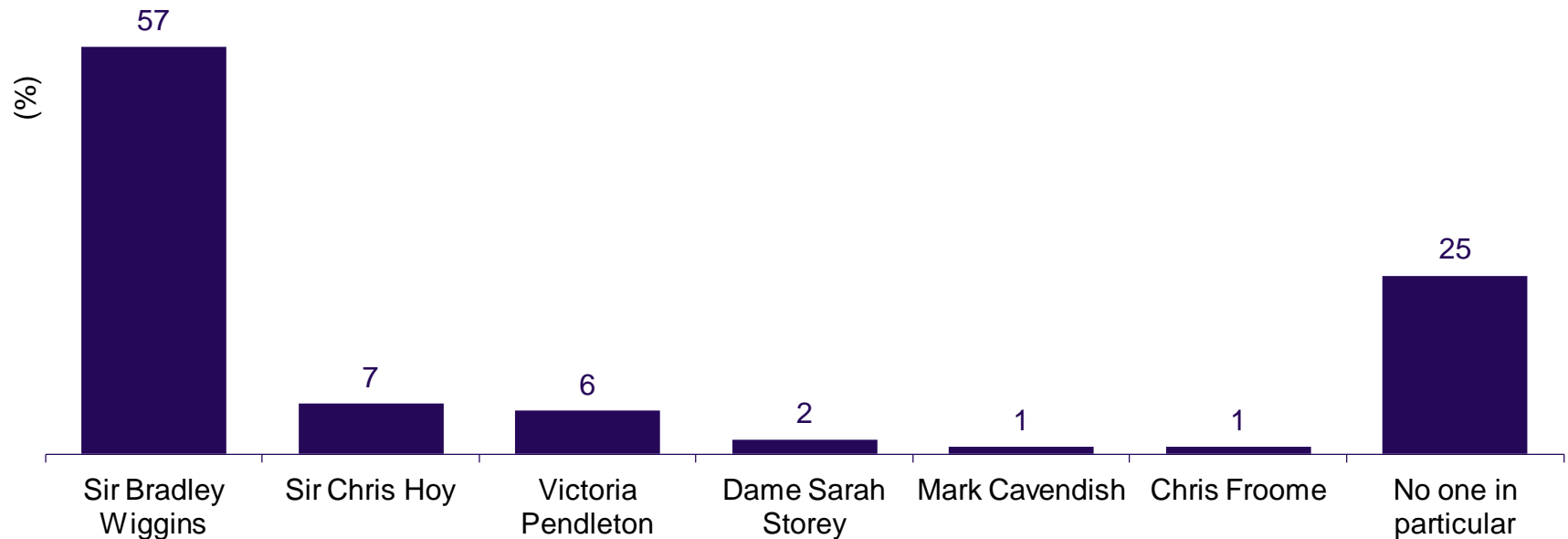
Q2012c. Have you cycled more as a result of watching/attending the London 2012 Olympic or Paralympic cycling events? Base: all who watched/attended any events (1,016)

Q2012d: What kind of trips have you been making? Base: all cycling more as a result of watching/attending Olympic/Paralympic cycling event (67)



Of the Olympic / Paralympic cyclists, Sir Bradley Wiggins was most likely to have inspired Londoners to increase their level of cycling

Cyclist who most inspired Londoners to cycle more



Q2012e. Which of the cyclists in the London 2012 Olympic/Paralympic Games inspired you the most to cycle more?

Base: all who cycled more as a result of watching cycling at the London 2012 Games (67)



Cycle training





Cycle training

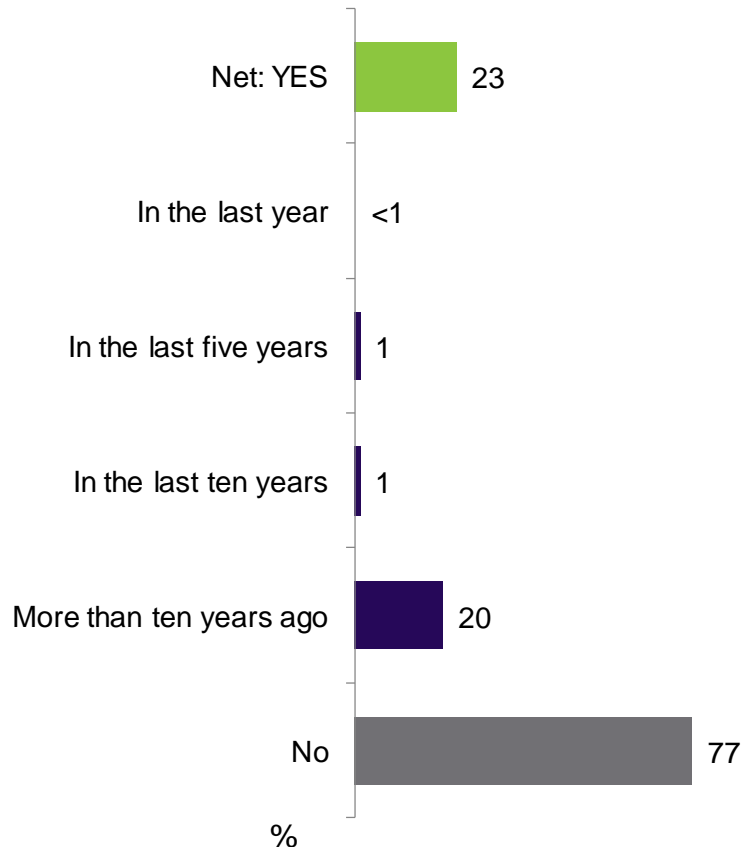
- ➔ 23% of Londoners have attended cycle training at some point in their lives, with the majority of these (43%) having done the old national Cycling Proficiency Test
 - 25% said they had taken school 'Bikeability' training
 - For most, the cycle training took place some time ago, with less than 3% of Londoners saying they had taken part in cycle training in the last ten years
- ➔ 23% of Londoners are aware that local councils offer cycle training to adults
 - BAME Londoners (16%) and those aged under 25 (11%) remain least likely to be aware that councils offer adult cycle training
- ➔ 31% of Londoners say they would consider taking cycle training in the future, rising to 45% of BAME Londoners



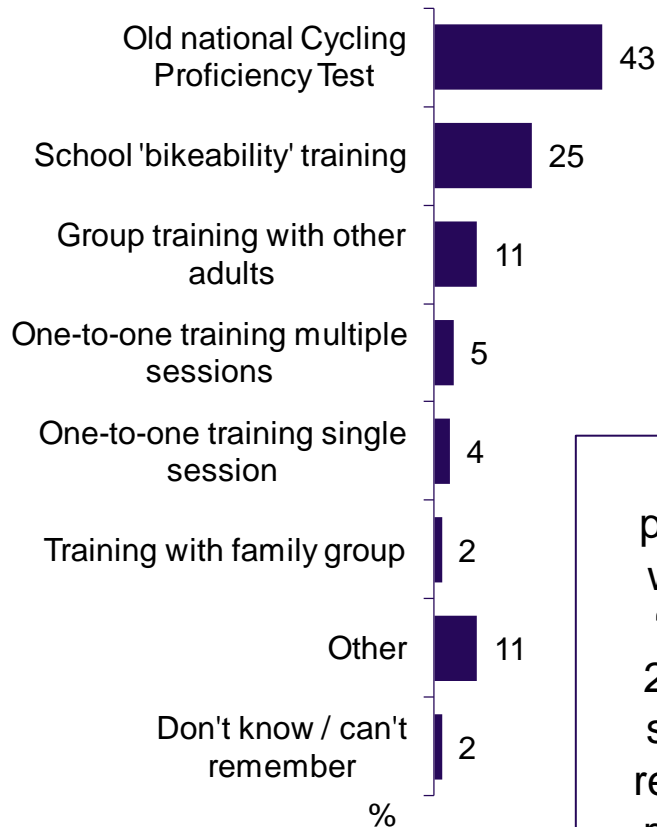
A quarter of Londoners have taken cycle training, the most common form being the national proficiency test, often more than 10 years ago

Experience of cycle training

Cycle training attendance



Type of cycle training attended



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

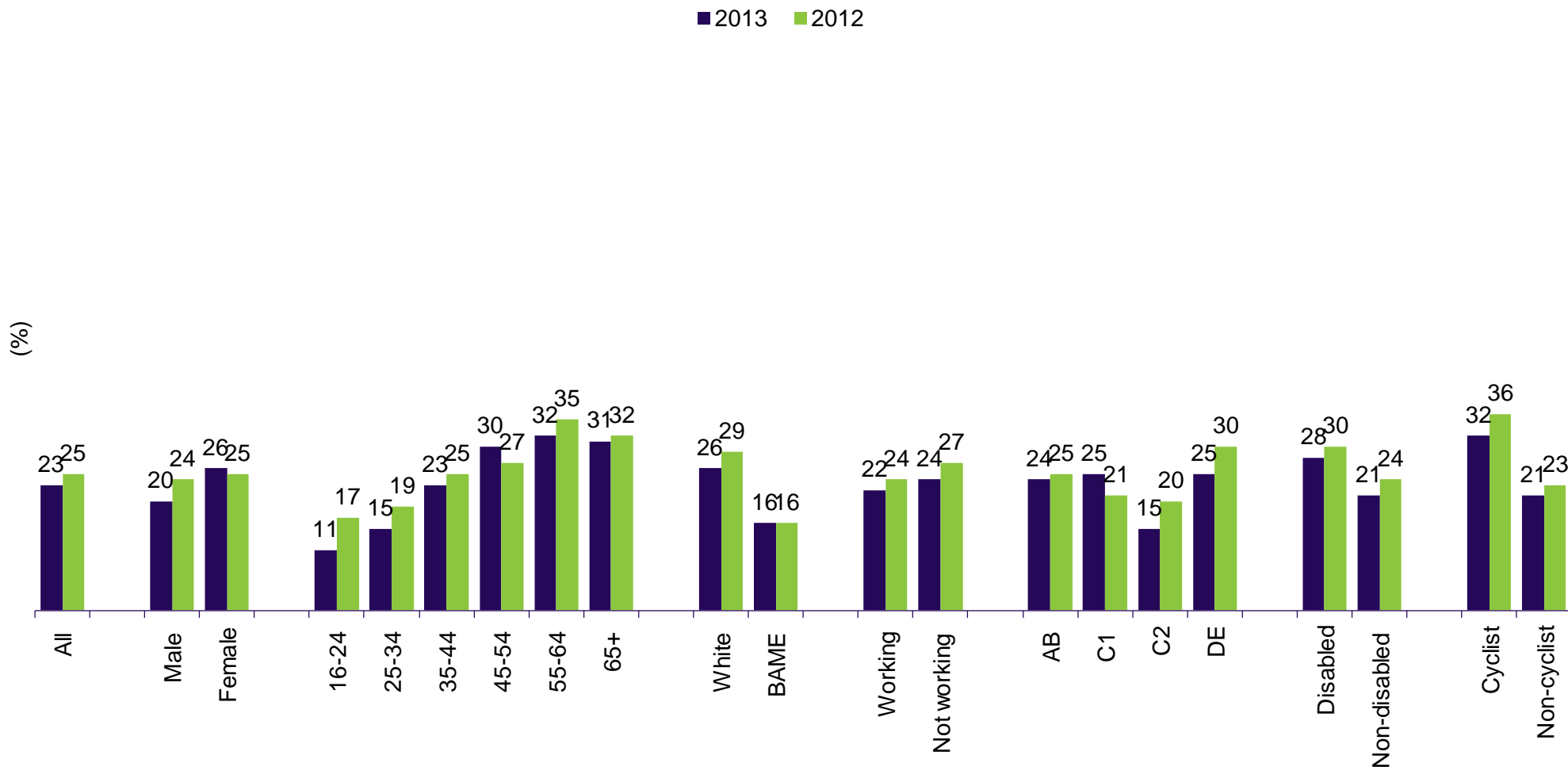
Q1: Have you ever attended any cycle training? Base: all (1,373)

Q2: What sort of cycle training did you have? Base: All those who have attended cycle training (340)



A quarter of Londoners know that most local councils provide adult cycle training; awareness remains highest among older Londoners and cyclists

Awareness that local councils offer cycle training for adults



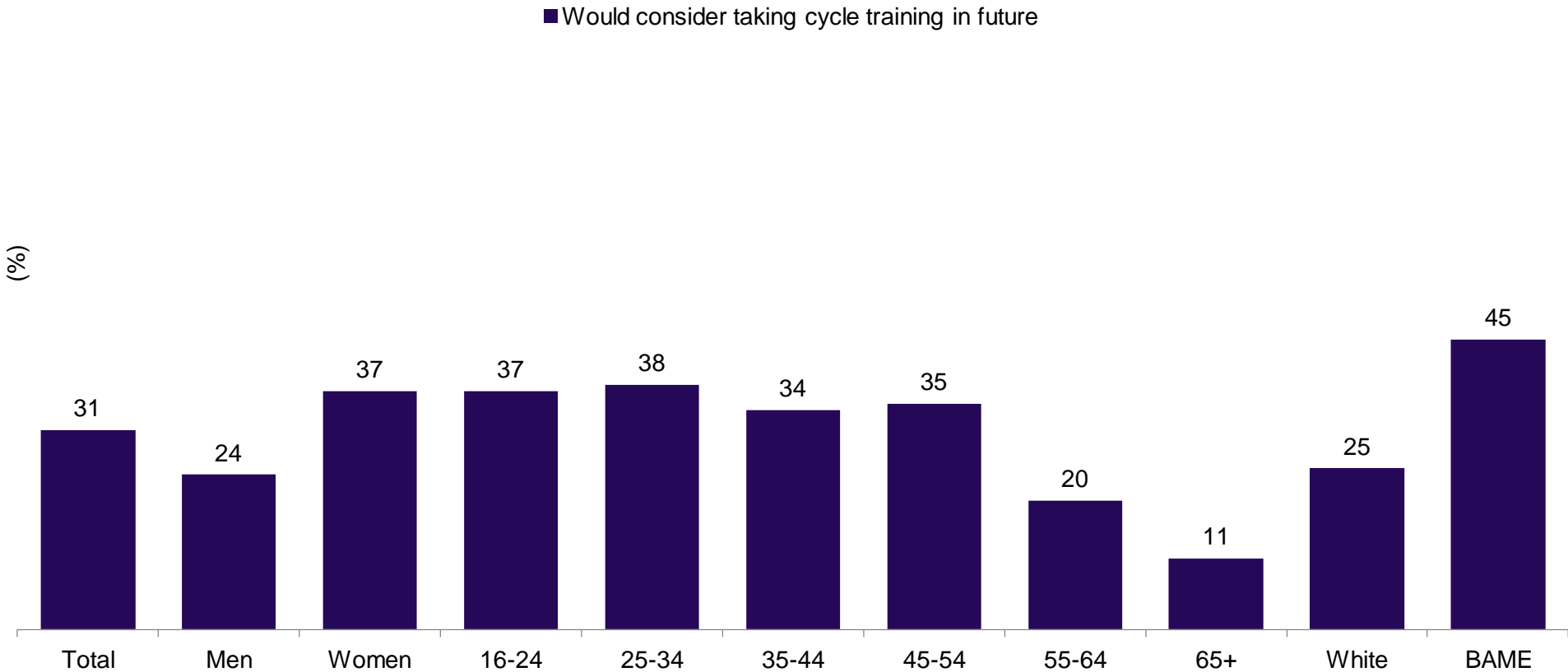
Q6: Are you aware that most local Councils offer free / discounted cyclist training for adults and children with a qualified instructor?

Base: all (2013: 1,373; 2012: 1,326)



Almost a third (31%) of Londoners would consider taking cycle training in the future, rising to 45% among BAME Londoners

Propensity to take cycle training in the future



Q4b. Would you consider taking cycle training in the future?
Base: all (1,373)

Full responses to this question found in appendix



Investment in cycling





Investment in cycling

Investment in cycling

- Half of Londoners think that there is about the right level of investment in cycling
- However, a third believe there is too little investment in cycling, rising to 55% of cyclists

Greenways

- 45% of Londoners are aware of Greenways (rising to 58% for cyclists)
- 4% of Londoners (and 16% of cyclists) have cycled on a Greenway



Half of Londoners think there is the right amount of investment in cycling (training, facilities, infrastructure), this is in line with 2012

Investment levels in cycling



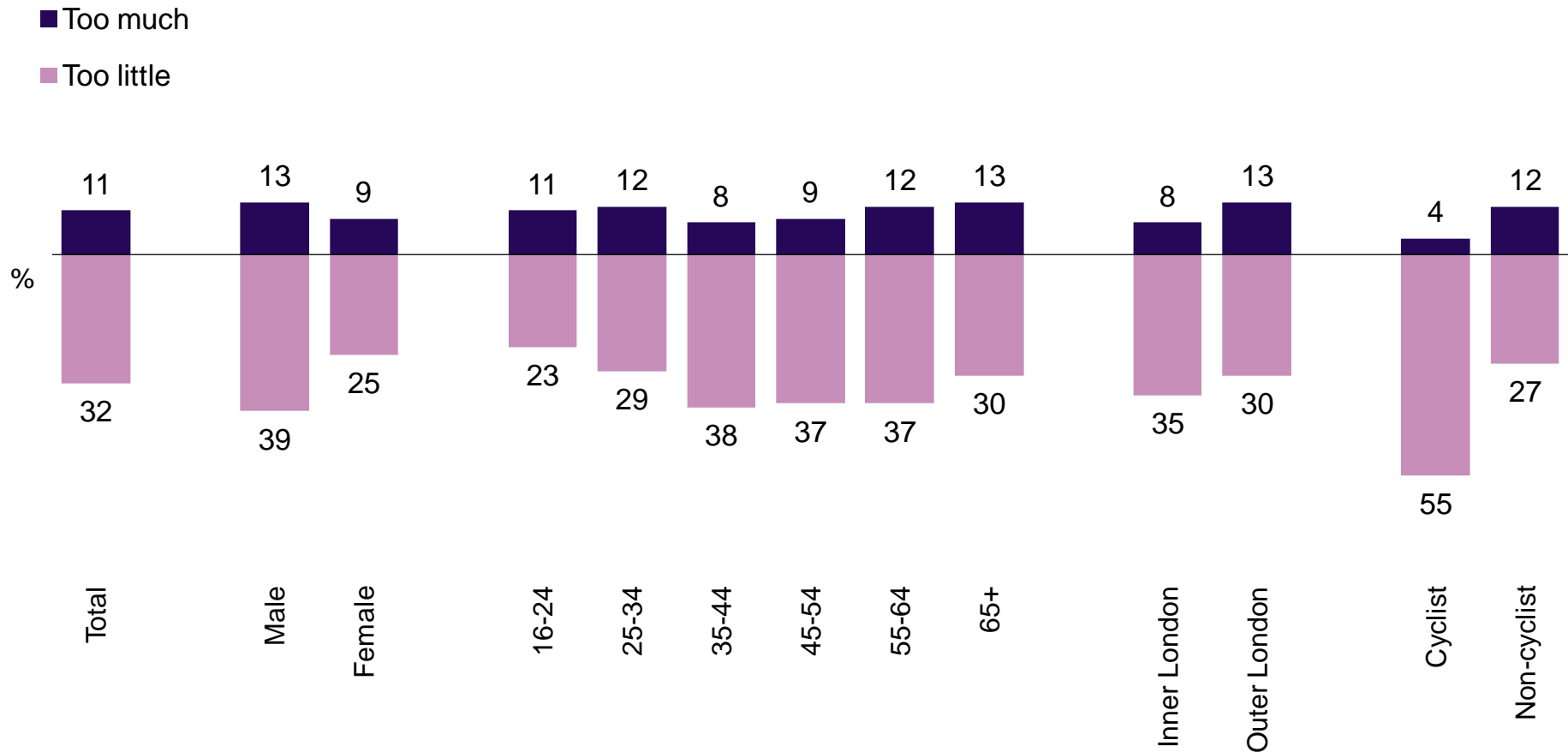
Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount?

Base: all (1,373)



As in 2012, Londoners are three times more likely to think that there is too little investment in cycling rather than too much

Perception of investment levels in cycling



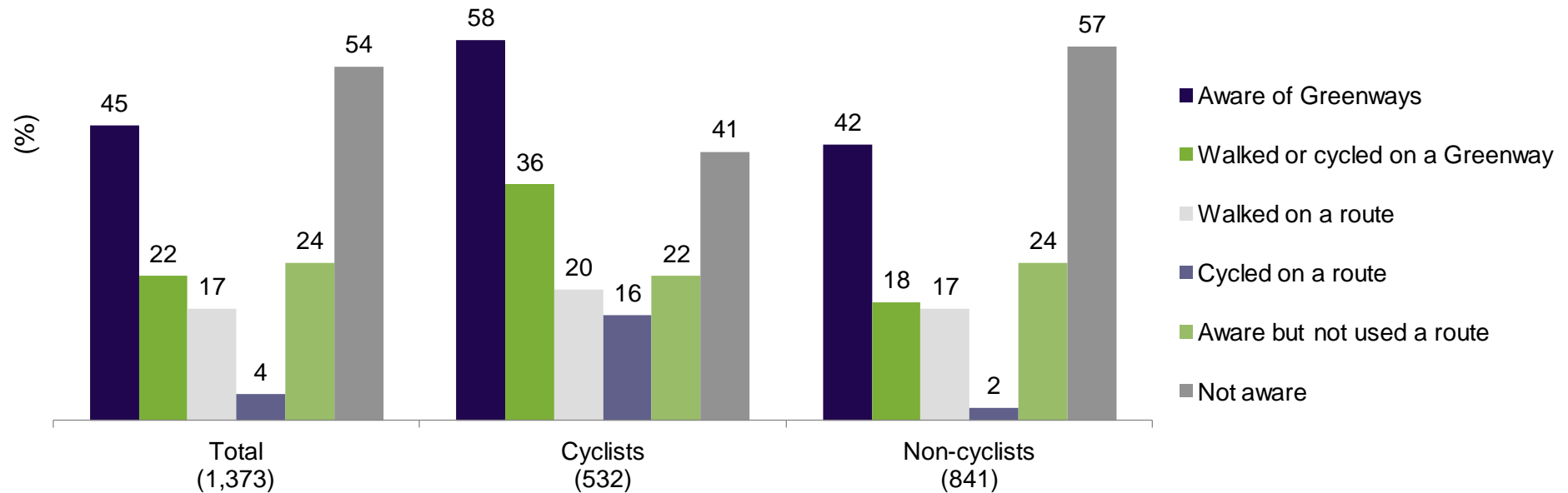
Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount?

Base: All (1,373)



45% of Londoners are aware of Greenways; 4% have cycled on one (rising to 16% among cyclists)

Awareness and use of London's Greenways



W14: Have you ever heard of London's Greenways, a network of walking and cycling routes around London? If yes, have you walked/cycled on one of the routes in the last six months?

Base: All (1,373)



Cycle crime





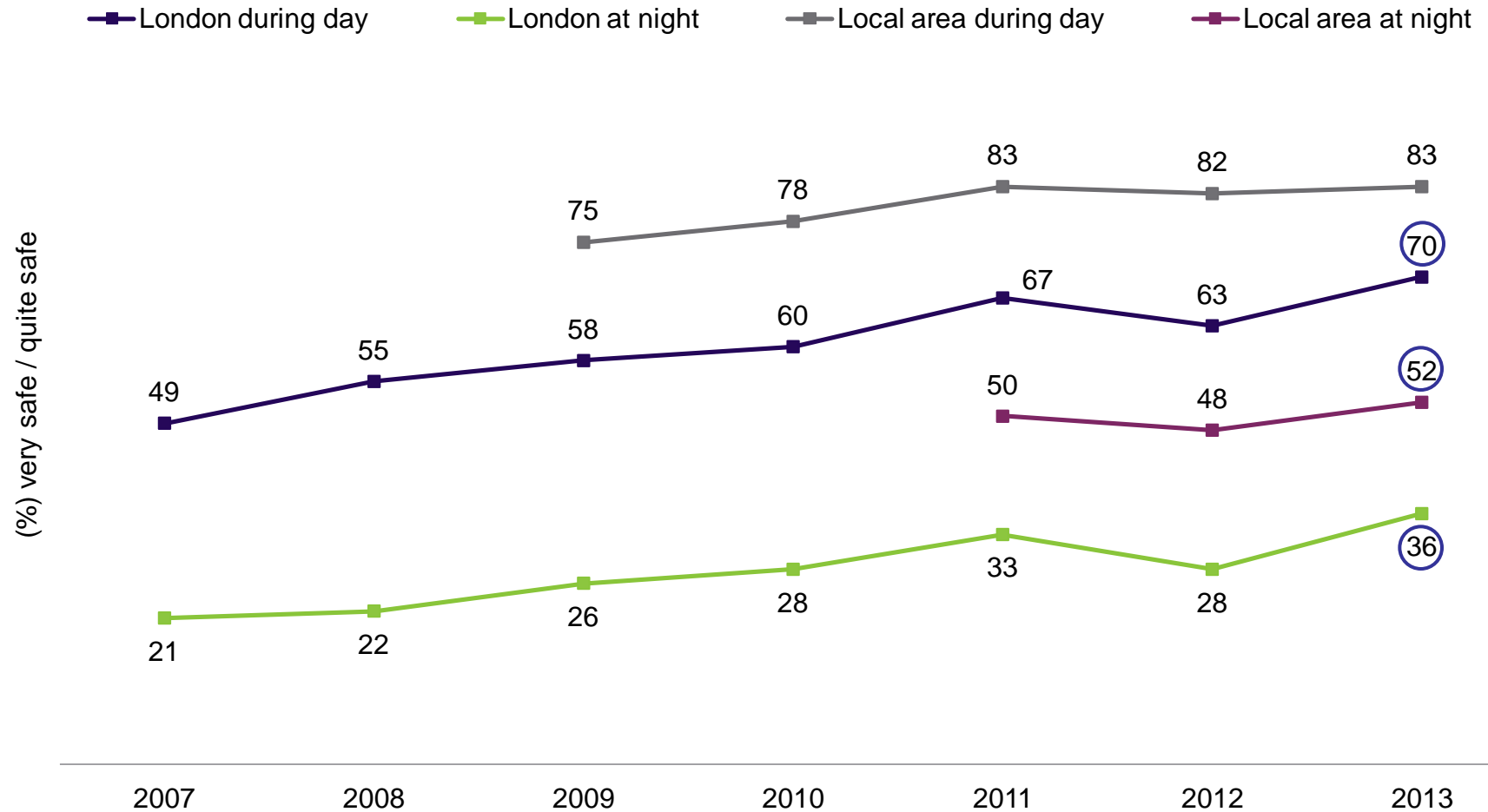
Cycle crime

- ➔ Perceptions of safety from crime and anti-social behaviour while cycling have regained their upward trend, following a dip in 2012
 - However, around half of cyclists say they change their route when cycling after dark, and this remains the time of day when feelings of safety are lowest
- ➔ As in 2012, over half (54%) agree that there is a lot of cycle crime in London, and almost half (44%) say this puts them off cycling
- ➔ Although most cyclists lock up their bikes when out and about, only three in ten regular cyclists have their bike marked / registered with the police
- ➔ A quarter of regular cyclists have had a bike stolen in the last couple of years, though only around half reported it to the police
 - Three in ten have experienced more than one bike theft
 - Stolen items are rarely recovered, though they are generally replaced
- ➔ Most of those who have experienced cycle theft have reduced the amount they cycle; 16% have stopped cycling altogether



Perceptions of cycling safety in London regained their upward trend this year, following a dip in 2012

Safety of cycling in London and local area (trend)



○ Significantly higher than 2012

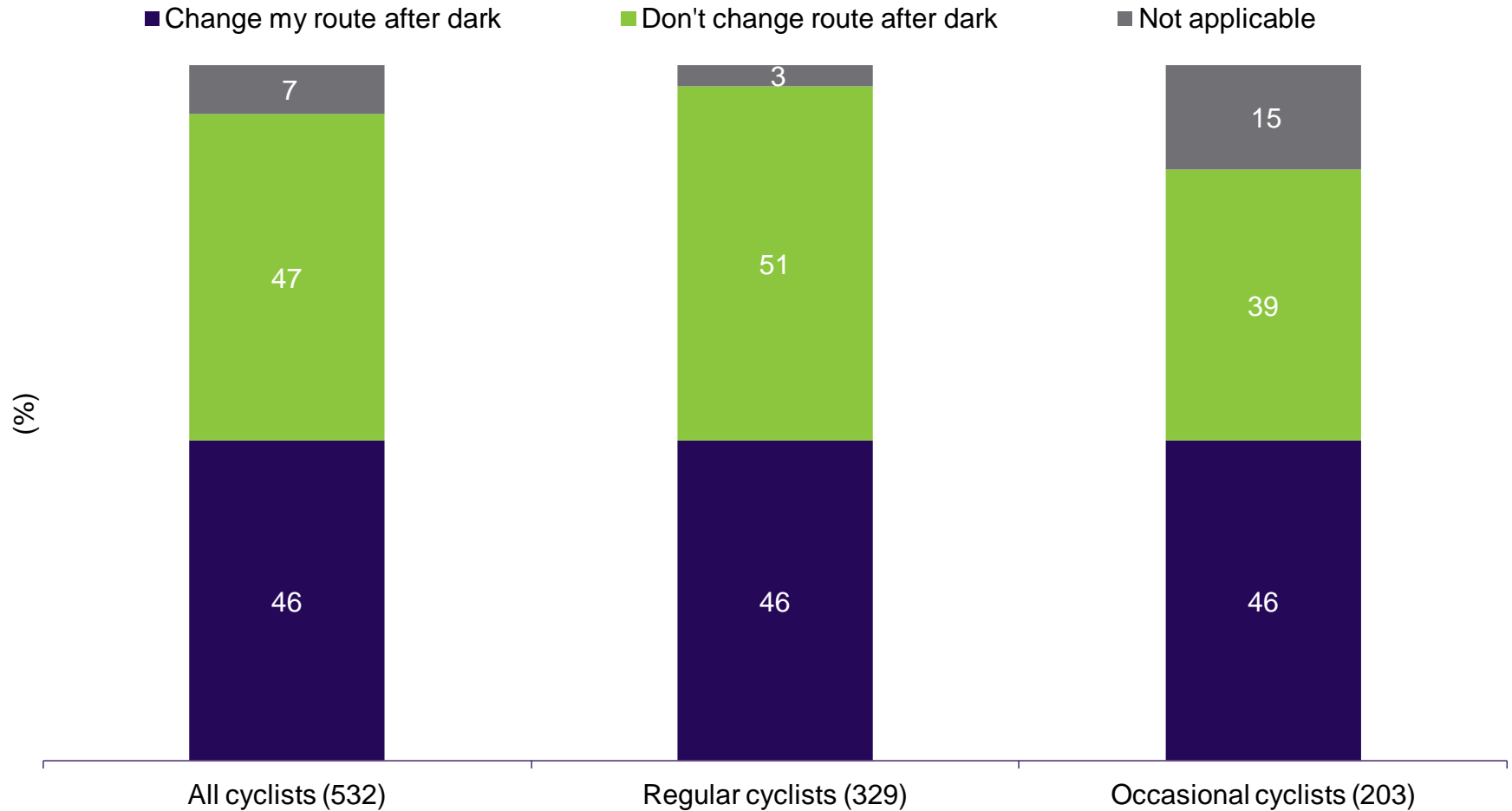
K1 – K4. Thinking about cycling in {London/local area} {during the day/at night}, how safe from crime or antisocial behaviour do you feel?

Base: All – 2013 (1,373) 2012 (1,326), 2007-2011 (c1,000)



Around half of cyclists change their route after dark, with little difference between regular and occasional cyclists

Change in cycling route after dark



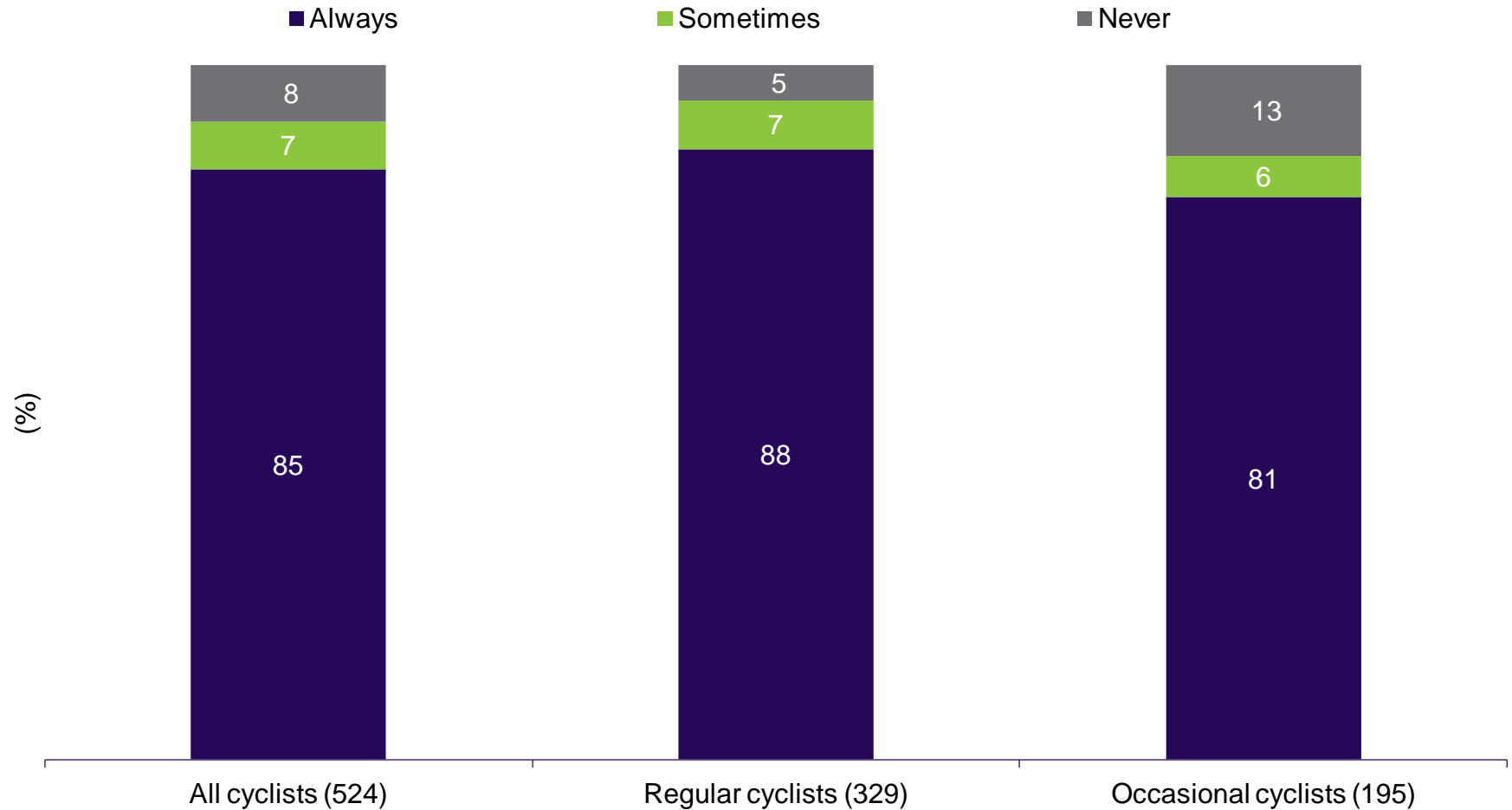
K5: Would you or do you change your cycling route depending on whether you are travelling in the dark?

Base: All cyclists (532)



Almost all cyclists lock up their bike when they leave it – though 13% of occasional cyclists ‘never’ do

Locking bicycle when out and about



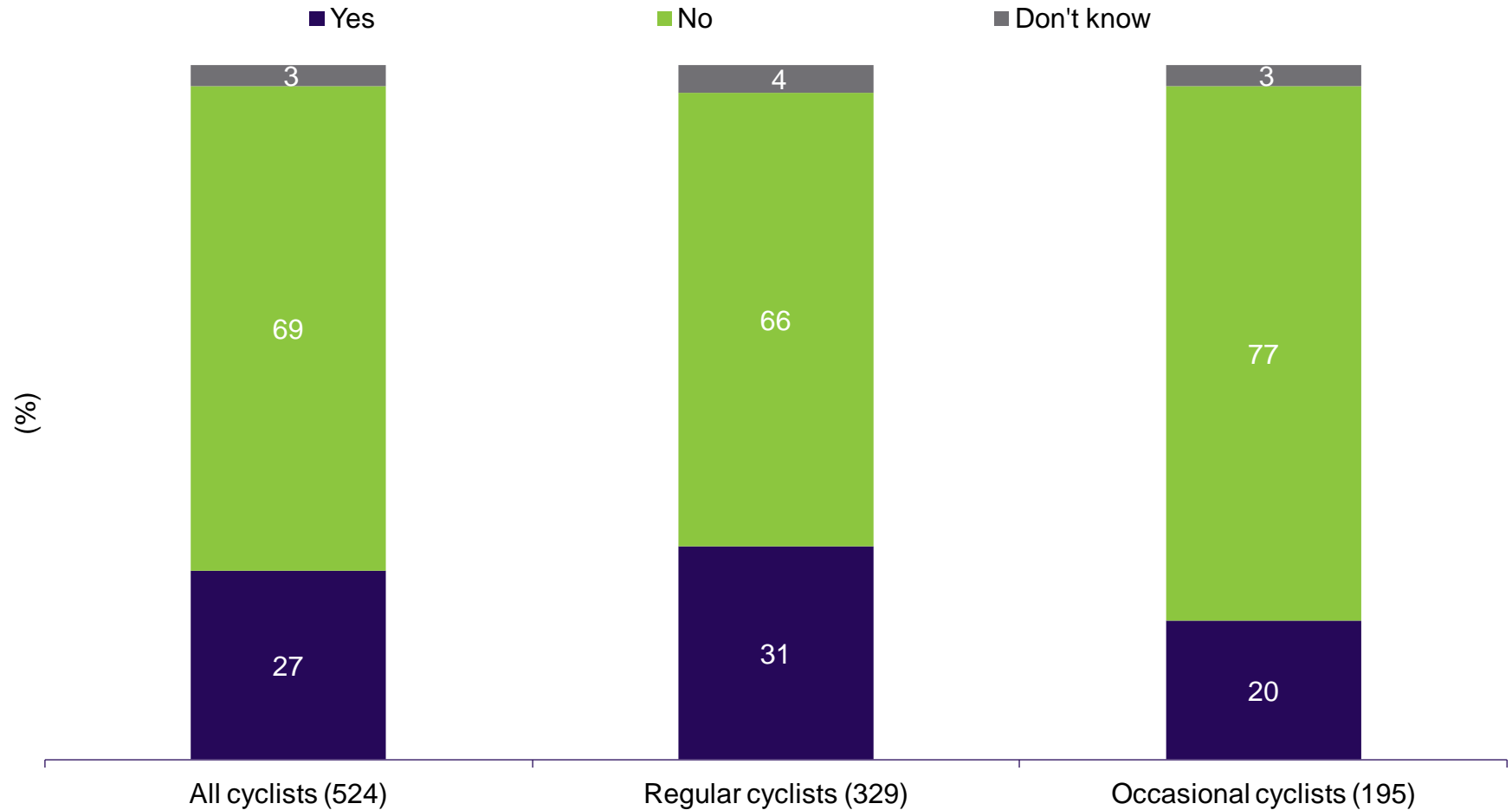
QLOCK1. When you're out and about on the bicycle you have access to how often do you secure it by locking it up?

Base: All cyclists who cycle at least once a month, or less but have access to a bicycle (524)



Three in ten regular cyclists have their bicycle marked / registered with the police, falling to 20% of occasional cyclists

Cycle marking / registration with police



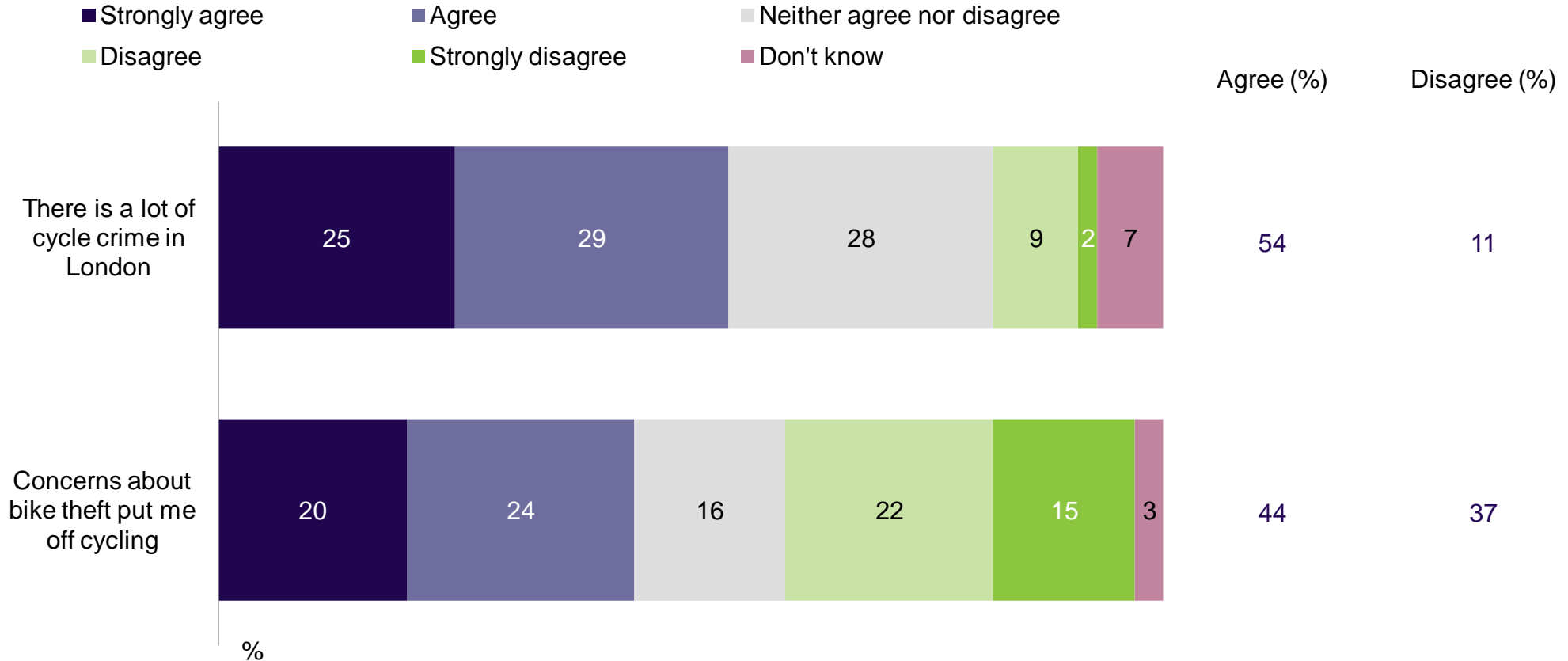
QMARK. Is the bicycle you have access to marked / registered with the police?

Base: all cyclists who cycle at least once a month, or less but have access to a bicycle (524)



More than half of Londoners agree that there is a lot of cycle crime in London, and almost half are put off cycling because of it

Attitudes towards cycle crime in London



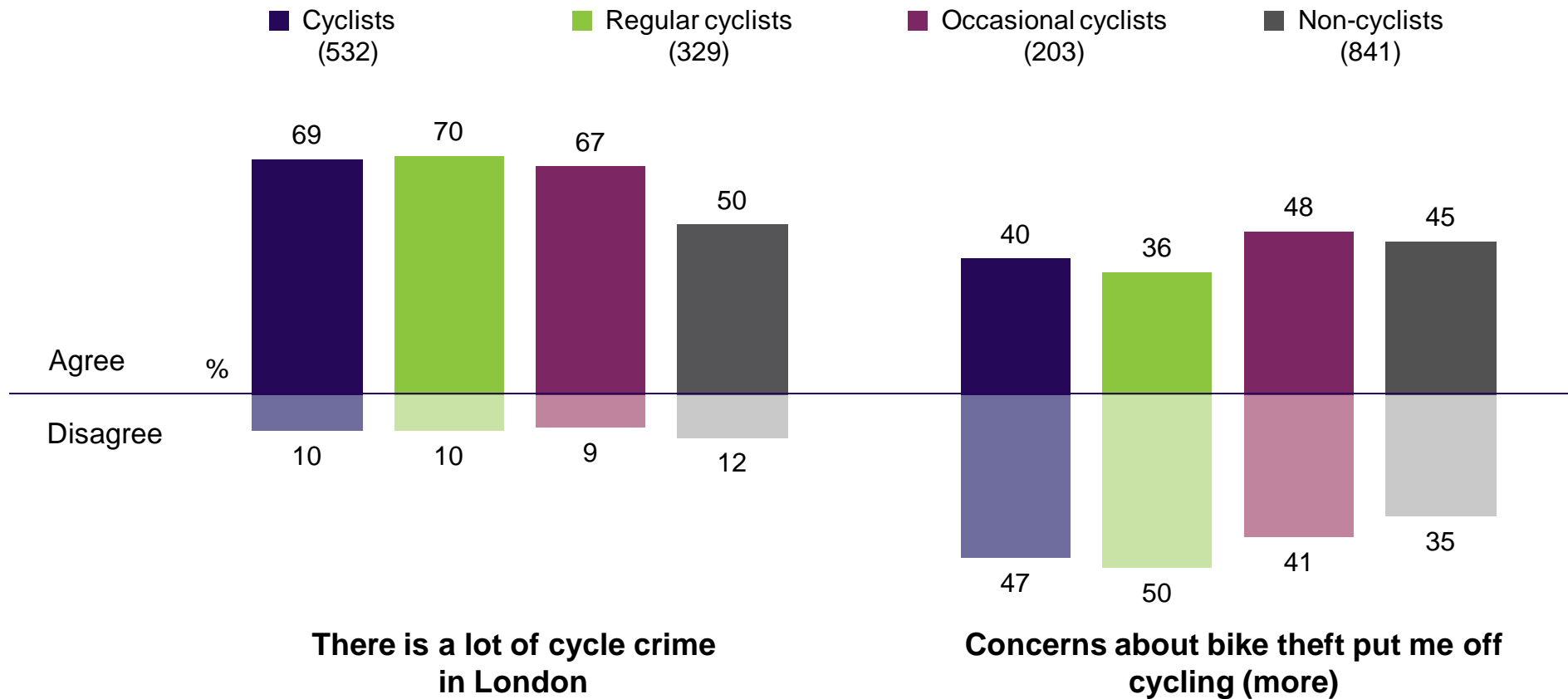
L1: To what extent do you agree or disagree with the following statements about cycle crime in London?

Base: all (1,373)



As in 2012, regular cyclists are most likely to agree that there is a lot of cycle crime in London, but least likely to be put off by it

Attitudes towards cycle crime in London



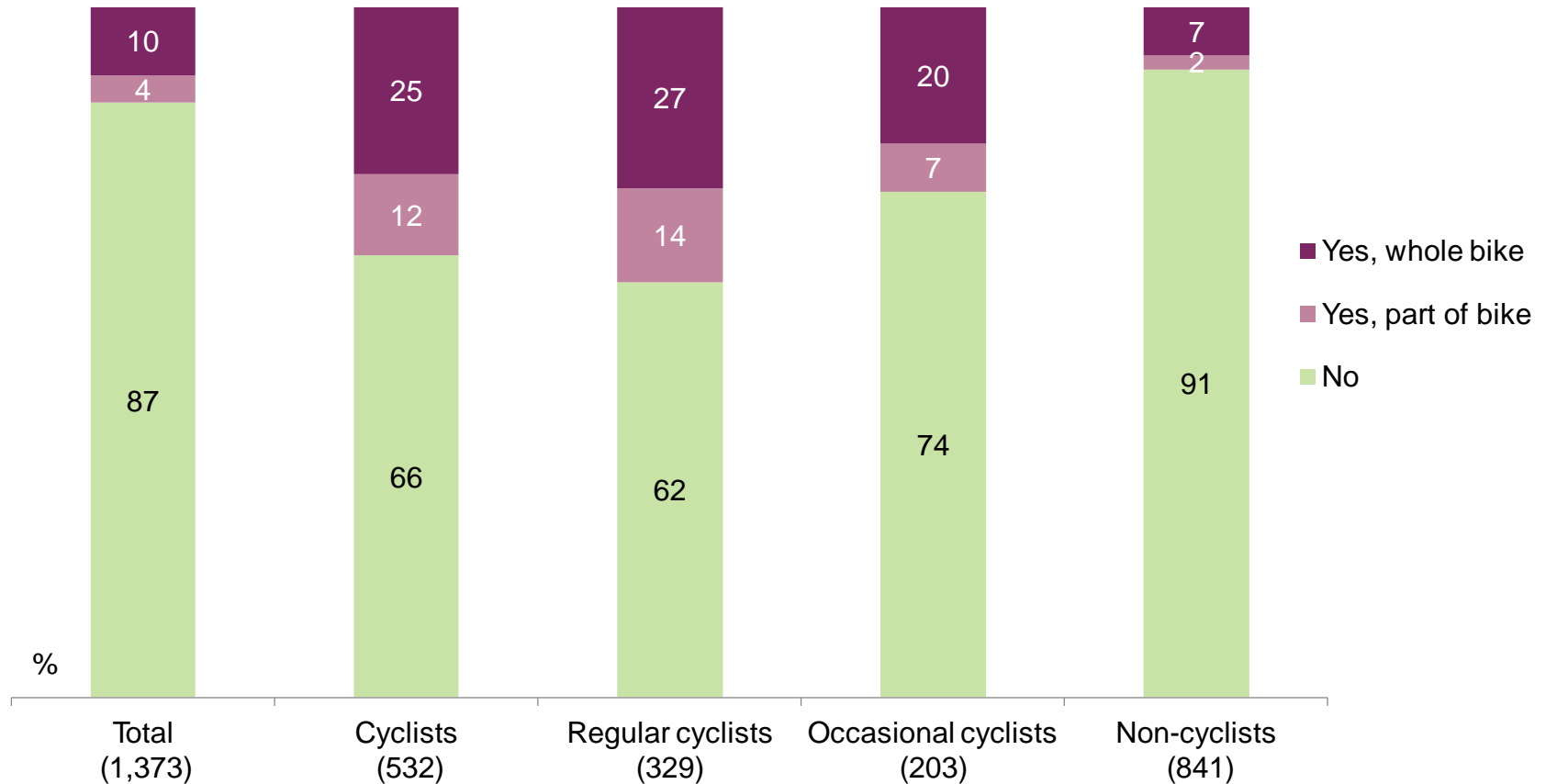
QL1: To what extent do you agree or disagree with the following statements about cycle crime in London?

Base: all (1,373)



A quarter of regular cyclists have had a bike stolen over the last couple of years

Reported incidence of cycle theft



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

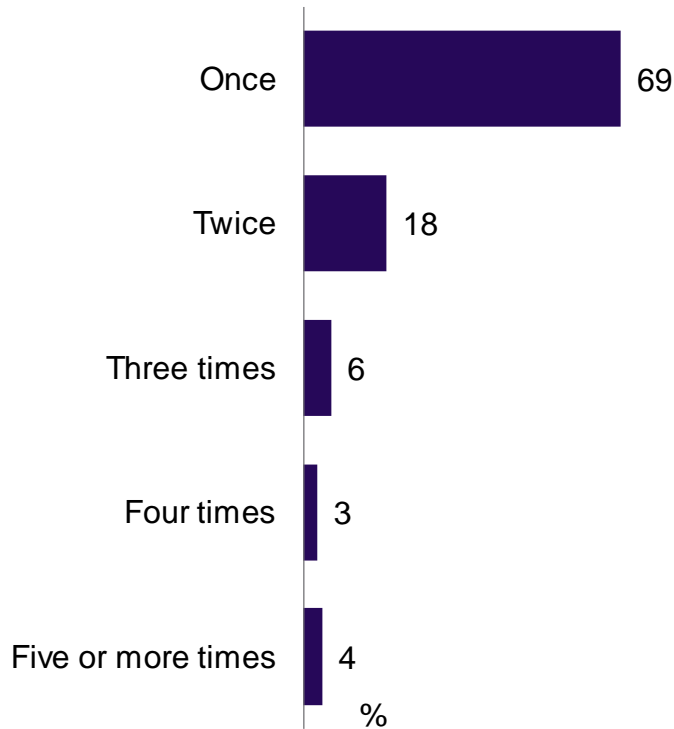
Base: all (1,373)



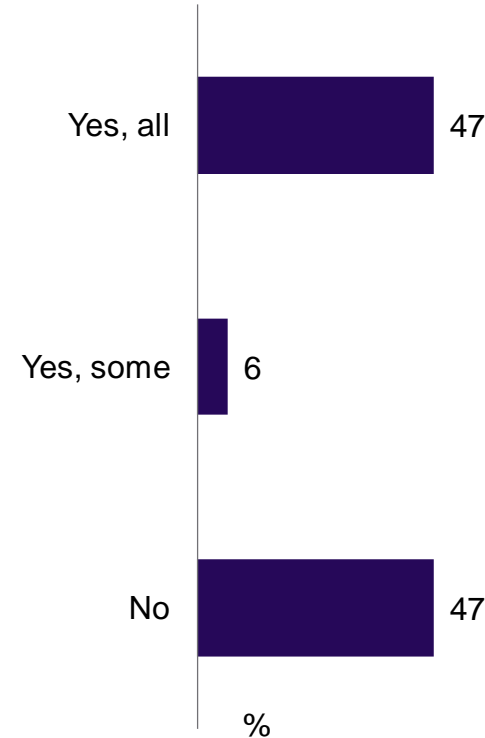
Three in ten of those to have experienced cycle theft have done so more than once, with around half the cases of bike theft reported to police

Number of cycle thefts experienced, and whether reported to police

Number of times had your bike (or part of bike) stolen



Whether reported to the police



Waste of time: 28%
Nothing would be done: 22%
Bike would not get returned: 10%
Bike was not worth much: 8%
Could not be bothered: 7%
Not convenient / too busy: 6%
Bike was found / returned: 5%
Only small part of bike: 5%
Others: 4% of below

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

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

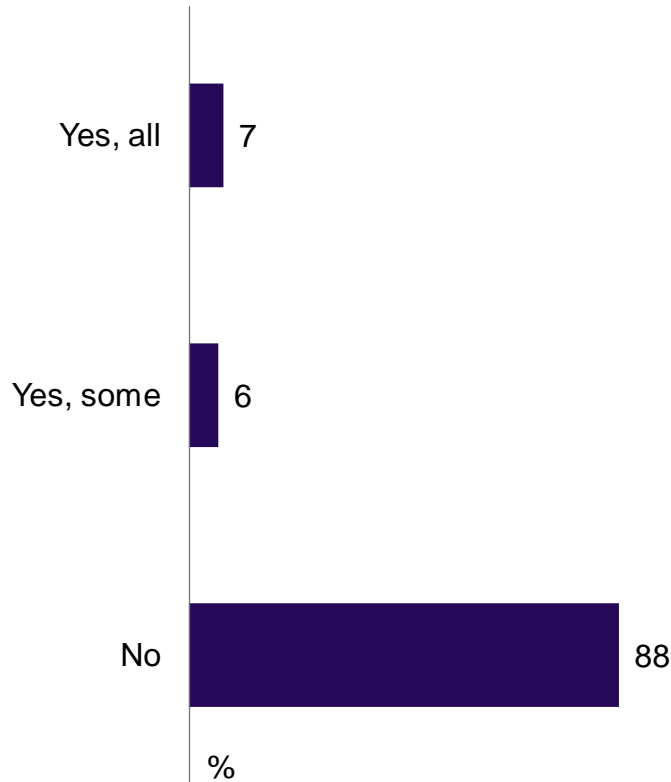
L9: Why didn't you report (all of) the incident(s) to the police? Base: all not reporting it to the police (111)



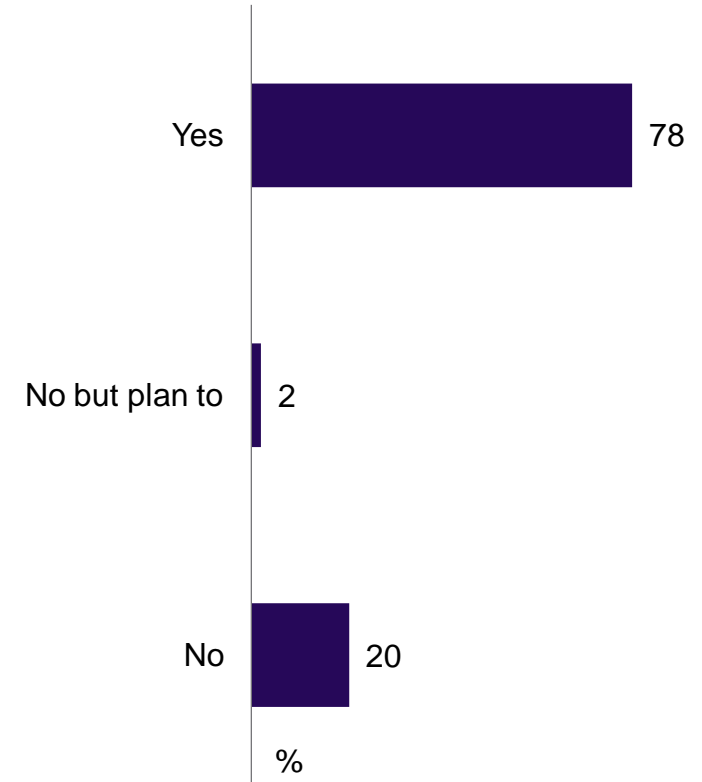
Very few stolen items were recovered, although most were replaced, this is in line with 2012

Whether stolen items were recovered / replaced

Whether recovered items that were stolen



Whether replaced the items not recovered



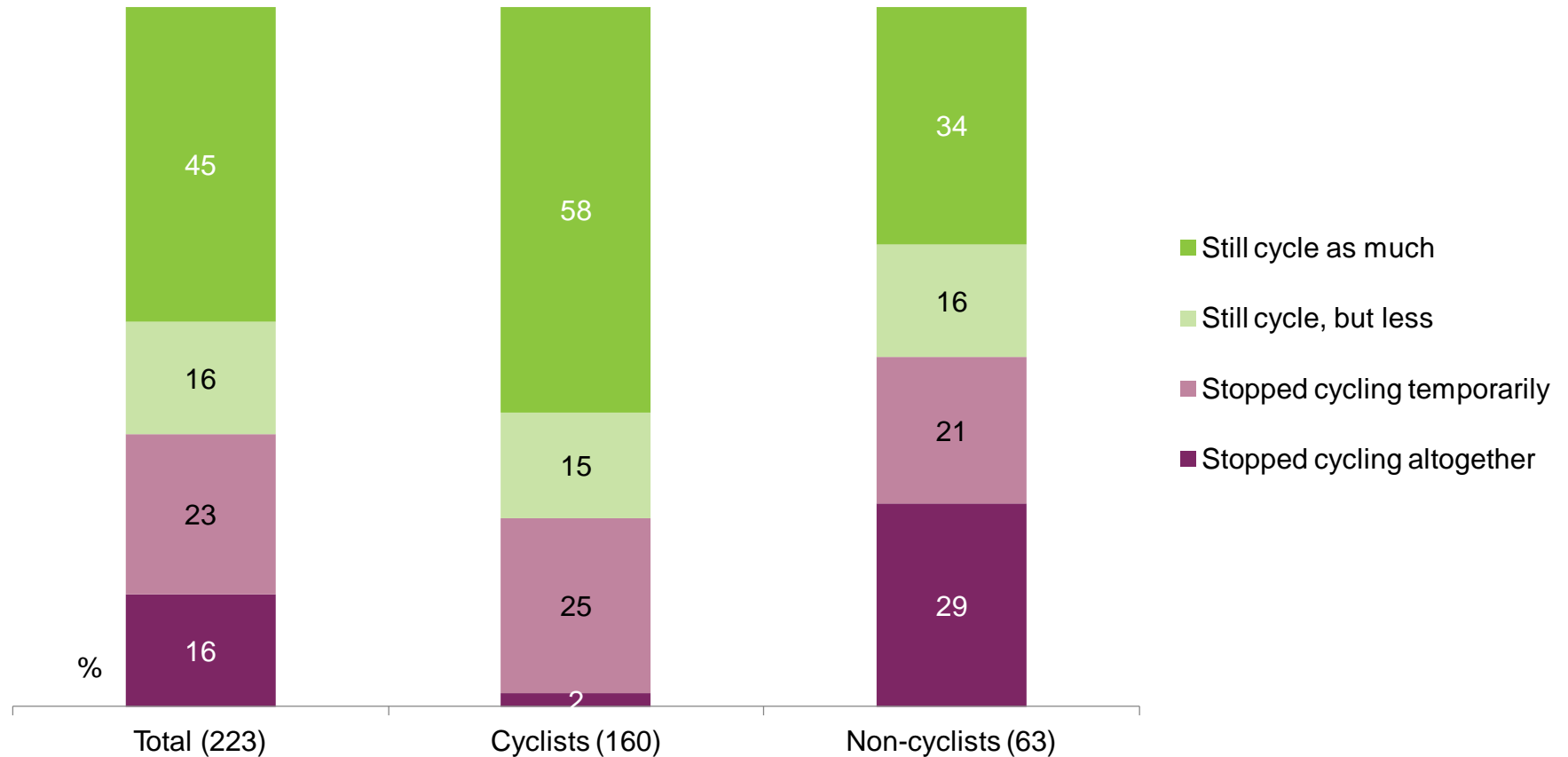
QL10: Did you recover the items that were stolen? Base: Those who have had a bike stolen (223)

QL11: Did you replace the items that you did not recover? Base: Those who have had a bike stolen and haven't recovered (212)



Most of those who have experienced cycle theft have reduced the amount they cycle, while 16% have stopped cycling altogether

Impact of cycle theft on level of cycling



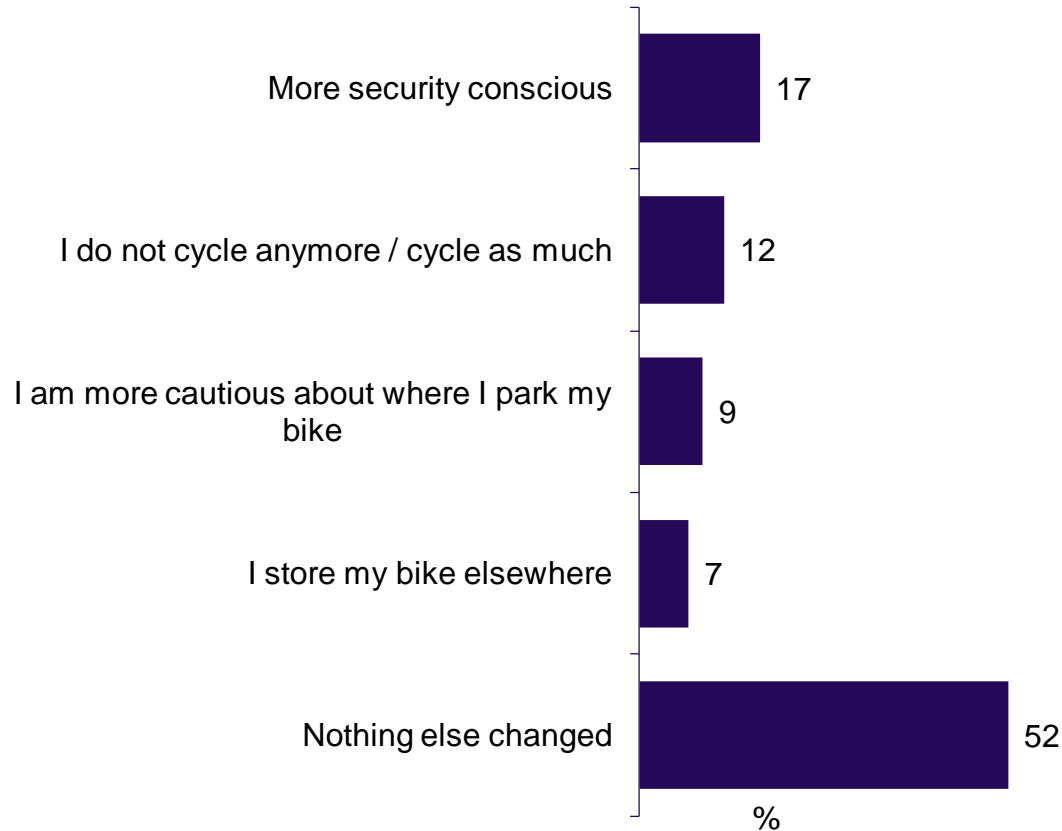
QL 12: What impact did being a victim of theft have on your level of cycling?

Base: Those who have had a bike stolen (223)



Over half of those who have experienced cycle theft did not alter their cycling behaviour

Behavioural change as a result of cycle theft



Mentions over 2% shown

L 13: Did being a victim of bike theft change anything about the way that you cycle?
Base: Those who have had a bike stolen (223)



Cycling confidence





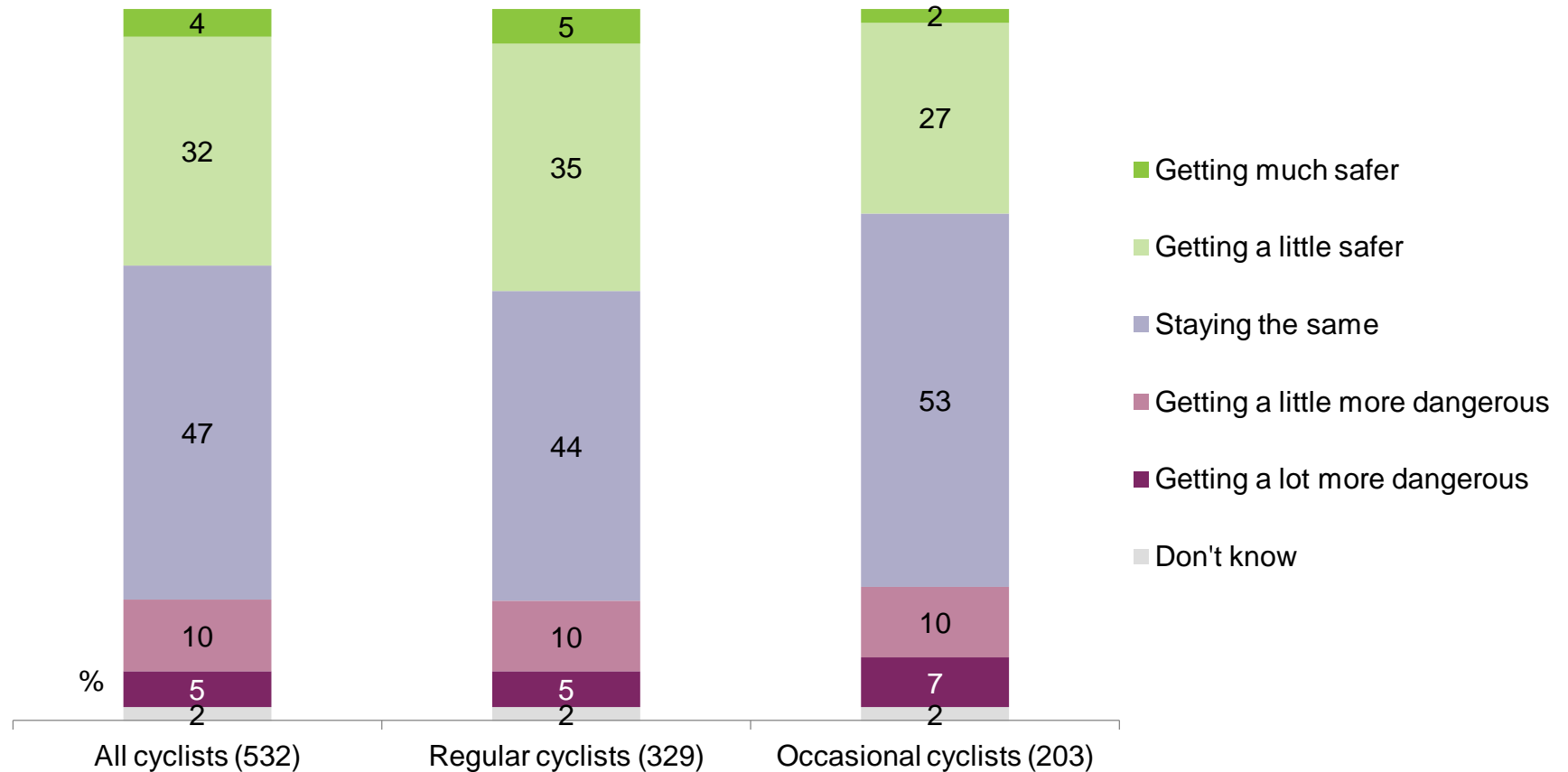
Cycling confidence

- ➔ More than a third of cyclists think that it is getting safer to cycle in London, compared with 15% who think it is getting more dangerous
 - Cyclists are most likely to say they feel less confident on busy roads
- ➔ Most cyclists have undertaken some 'inadvisable' behaviour at some point – around half have cycled without a helmet or on the pavement
 - Of those behaviours asked about, the likely to be done 'always' are cycling without a helmet (52%), and cycling after dark without hi-vis clothing (48%)



More than a third of cyclists think that it is getting safer to cycle in London, compared with 15% who think it is getting more dangerous

Perceptions of increased safety for cycling



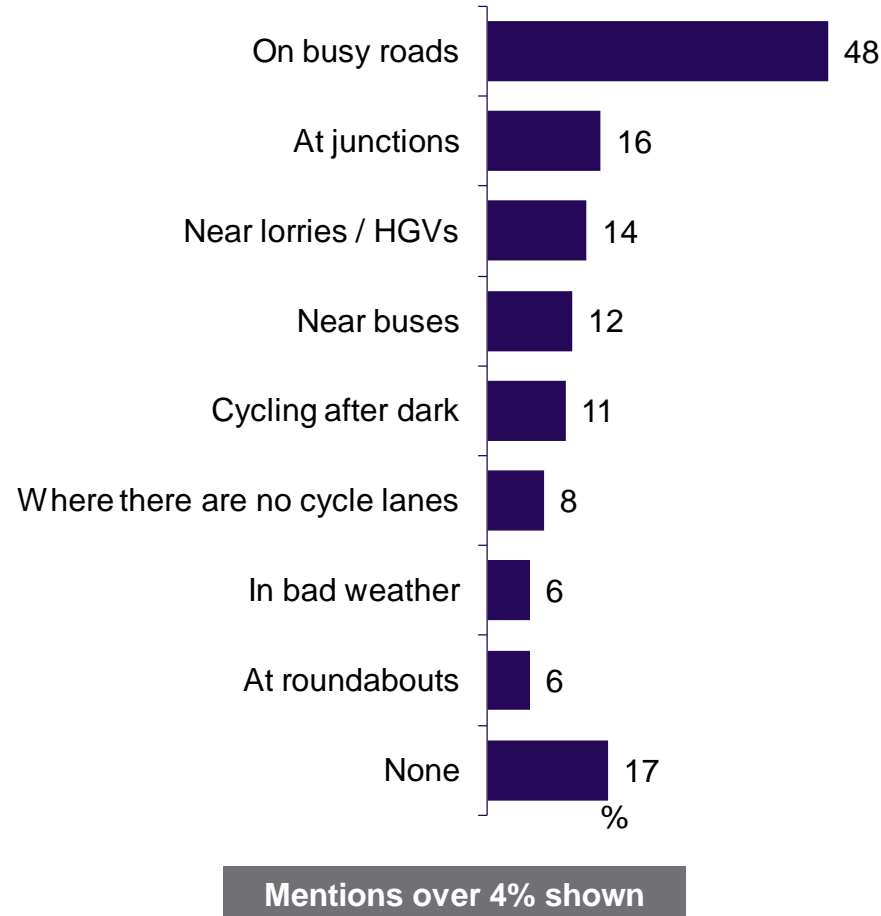
J5: Do you think cycling around London is getting safer, getting more dangerous, or staying the same?

Base: All cyclists (523)



Cyclists are most likely to say they feel less confident on busy roads, although there are no differences between regular and occasional cyclists

Situations in which cyclists feel less confident



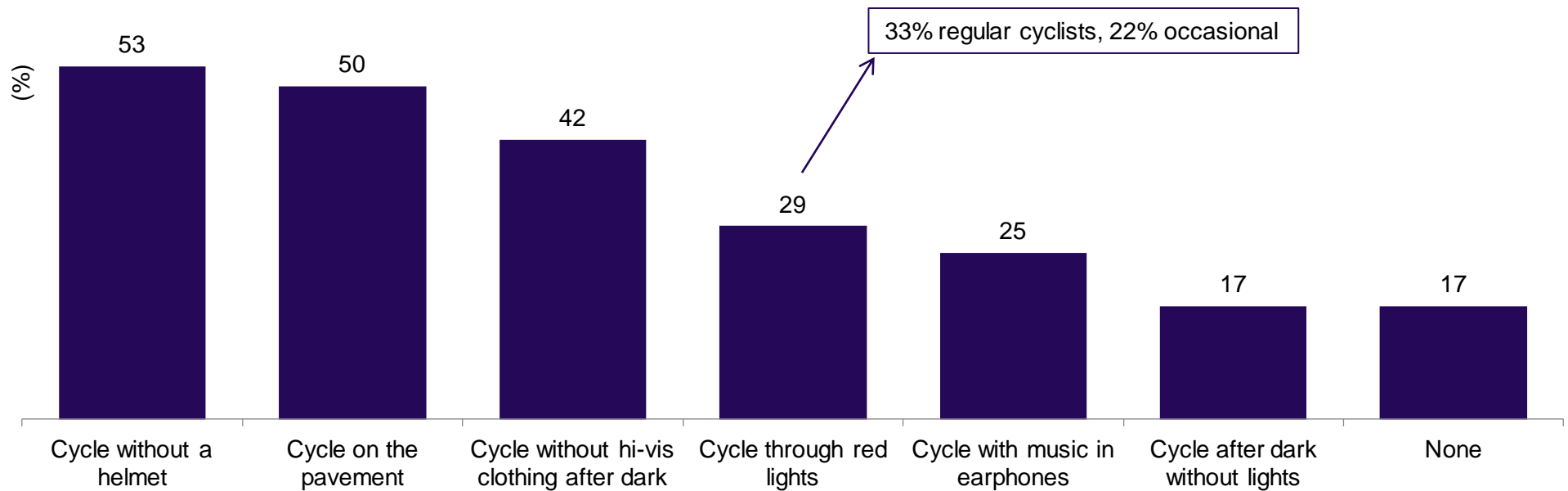
J2: Are there any situations where you feel less confident when cycling?

Base: All cyclists (532)



Most cyclists have undertaken some 'inadvisable' behaviour at some point – around half have cycled without a helmet or on the pavement

Prevalence of 'cycling behaviours'



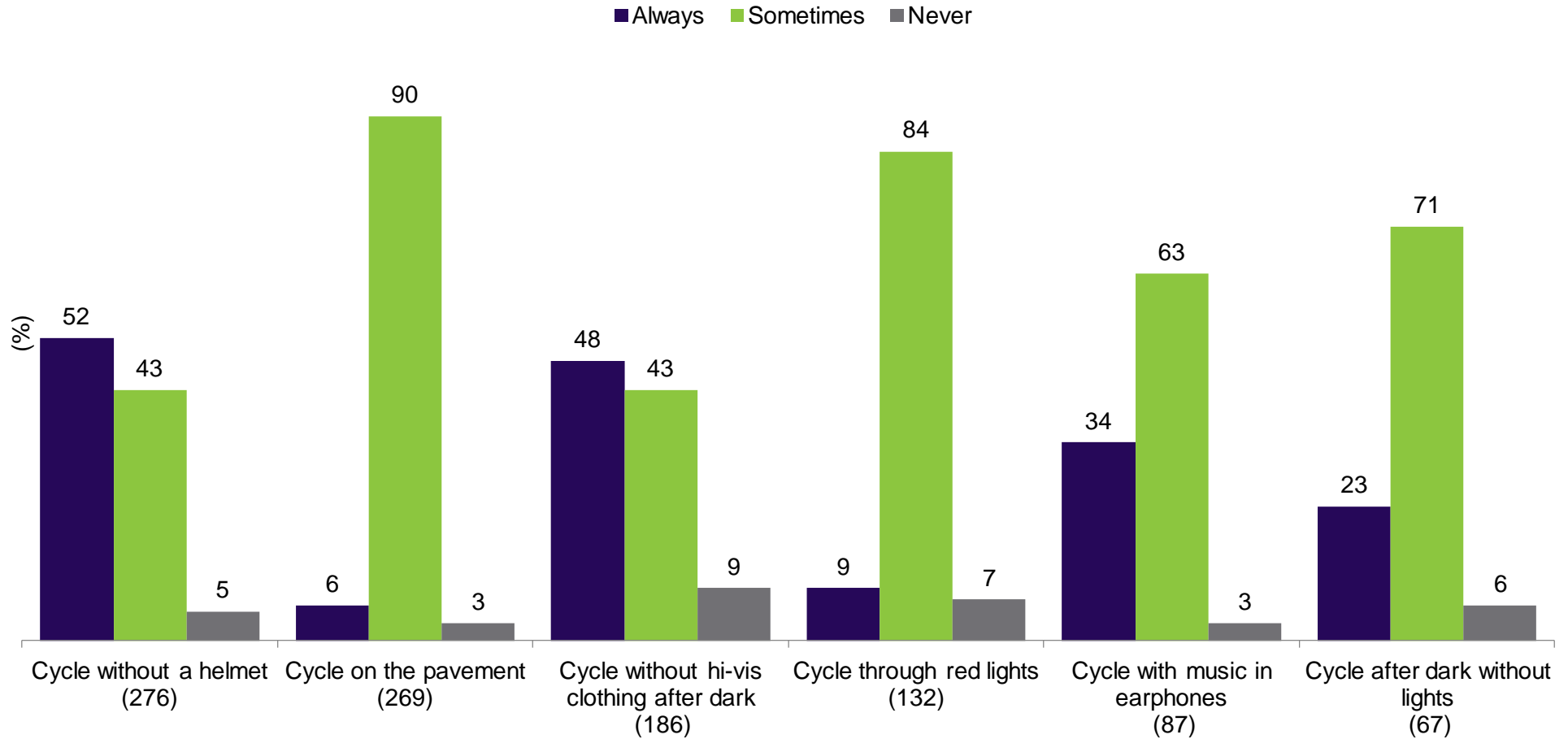
J3: While cycling in London, do you ever do any of the following?

Base: all cyclists (532)



Of those behaviours asked about, the most commonly done 'always' are cycling without a helmet, and cycling after dark without hi-vis clothing

Prevalence of 'cycling behaviours'



J4: How often do you ...?

Base: all who do each (in brackets in chart)



Appendix





Appendix

Methodology

- The research comprised 1,000 telephone interviews with adult Londoners, plus 373 further interviews with cyclists to boost the total sample of cyclists to 532
- Fieldwork took place in March and April 2013
- The survey took place over the telephone and used the “next birthday rule” such that interviewers asked to speak to the person over the age of 16 in the household who celebrates their birthday next
- A random sample of London landlines was used to conduct the research
- The final data set was weighted back to be representative of Londoners in terms of age, gender, inner/outer London, ethnicity and working status according to 2001 census data
- For the cyclists, the next birthday rule was not used, the interview taking place with any cyclist in households called at random. Data for cyclists were weighted back to give an overall base of 1,000 – ie for total sample figures given in this document, cyclists are not over-represented



Appendix

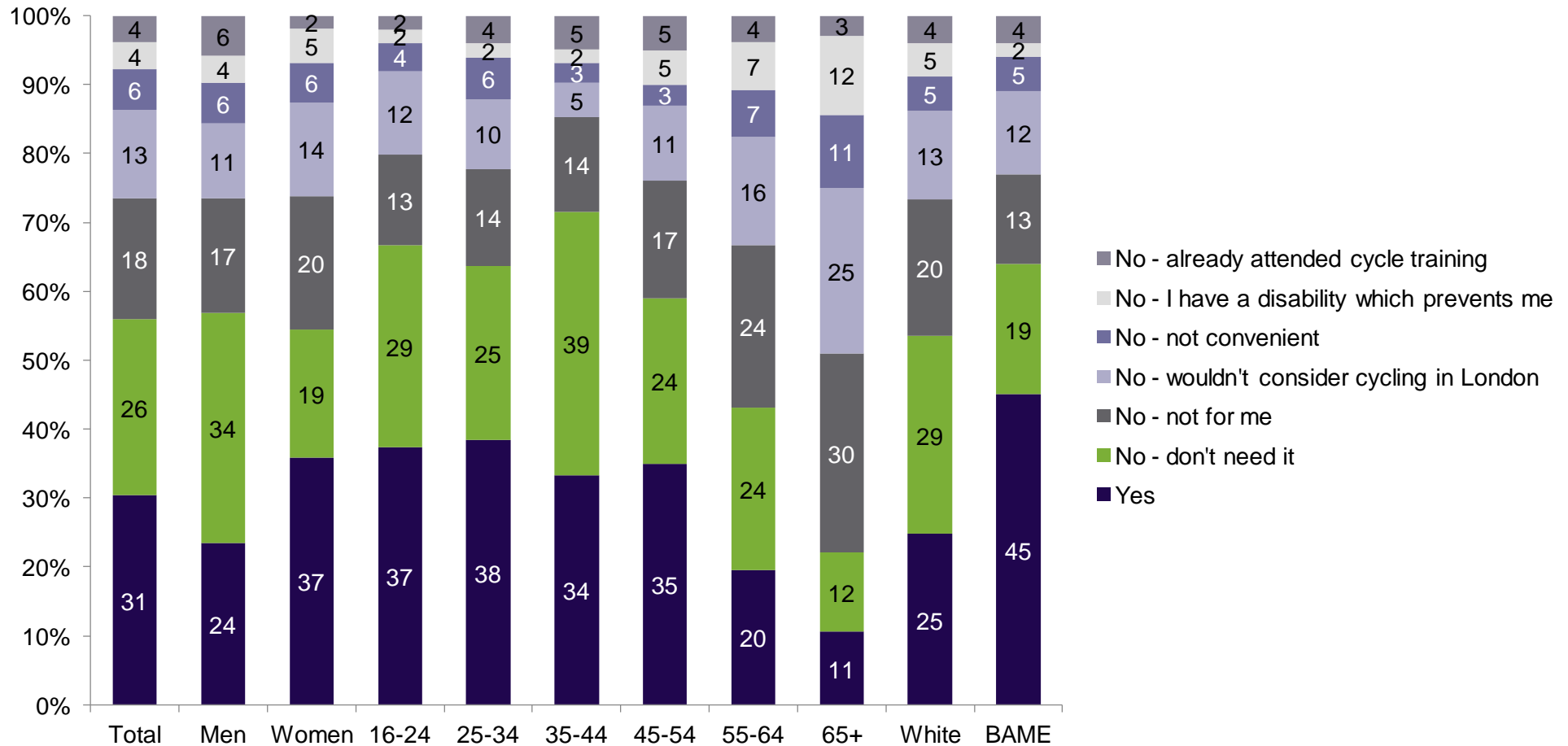
Variable	%
Gender	
Male	49%
Female	51%
Age	
16-24	15%
25-34	24%
35-44	20%
45-54	15%
55-64	11%
65+	16%
Ethnicity	
White	69%
BAME	28%

Variable	%
Working status	
Working	59%
Not-working	39%
Social class	
A	16%
B	27%
C1	20%
C2	10%
D	7%
E	11%



Almost a third of Londoners would consider taking cycle training in the future, with BAME Londoners most likely (45%)

Propensity to take cycle training in the future



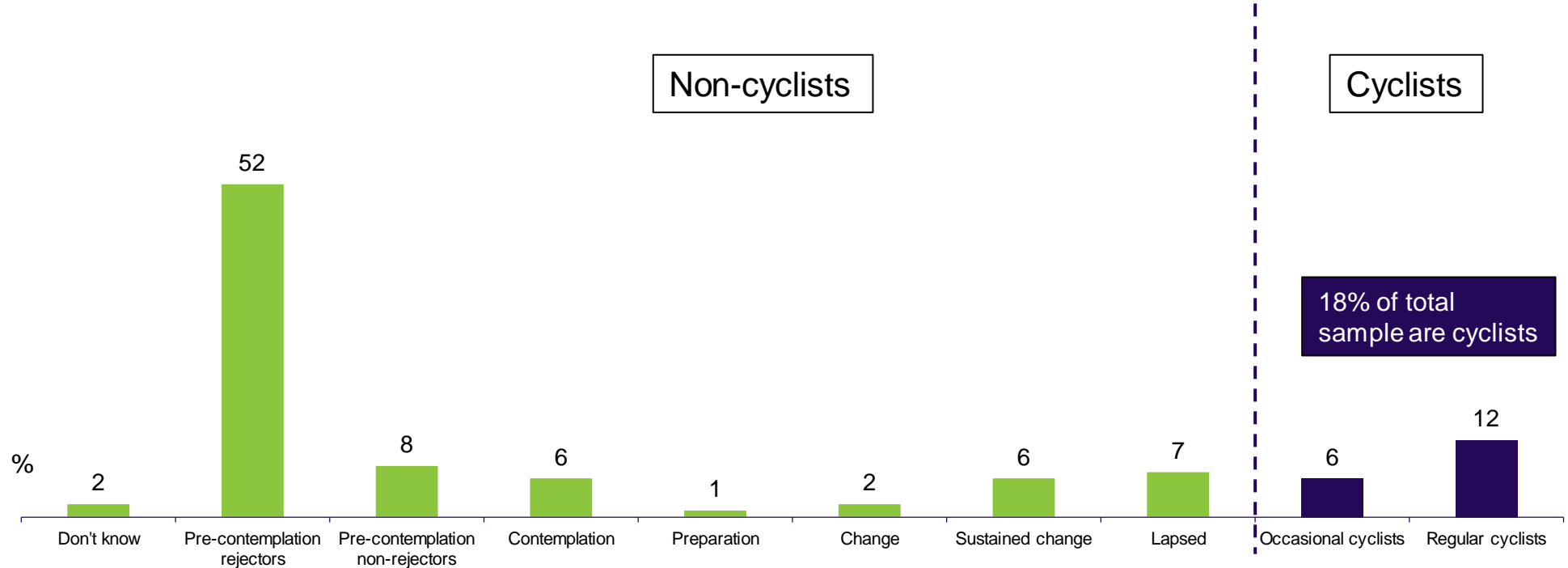
Q4b. Would you consider taking cycle training in the future?

Base: all (1,373)



Linear progression of the behaviour change model

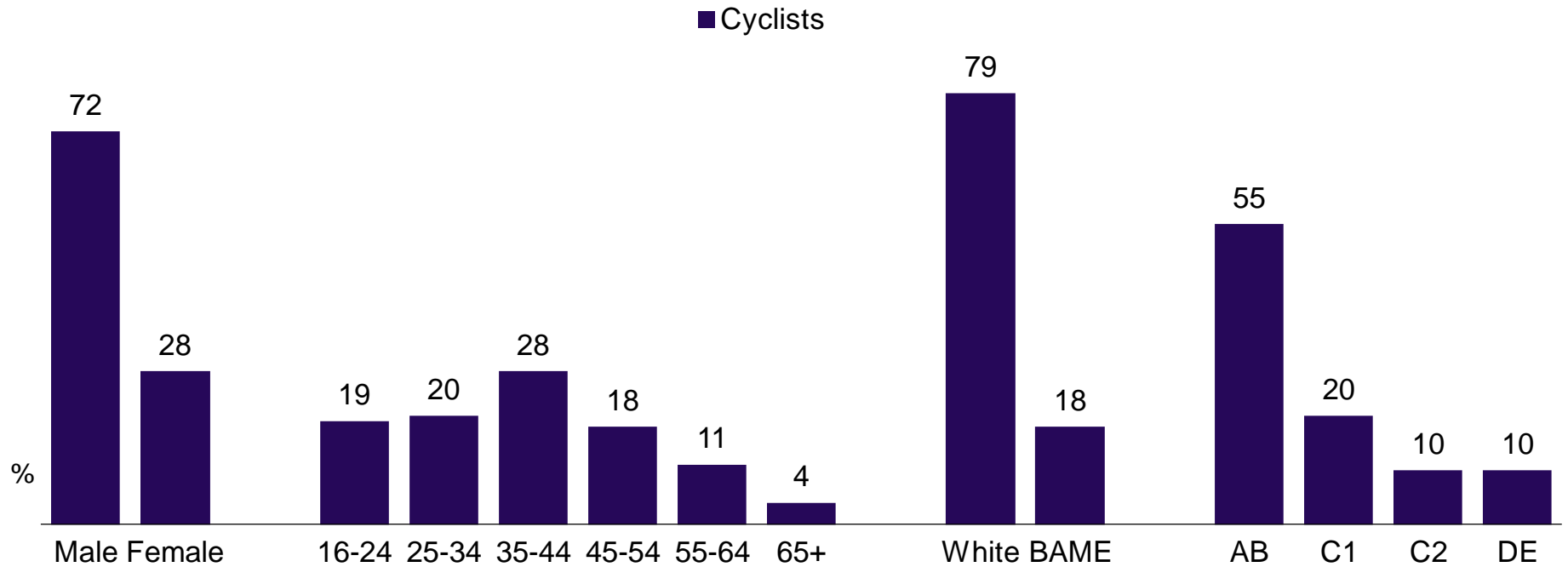
Behaviour change model



B1/2: Thinking about the possibility of "cycling more" / "taking up cycling", which of these descriptions would you say MOST applies to you?
Base: All (1,373)



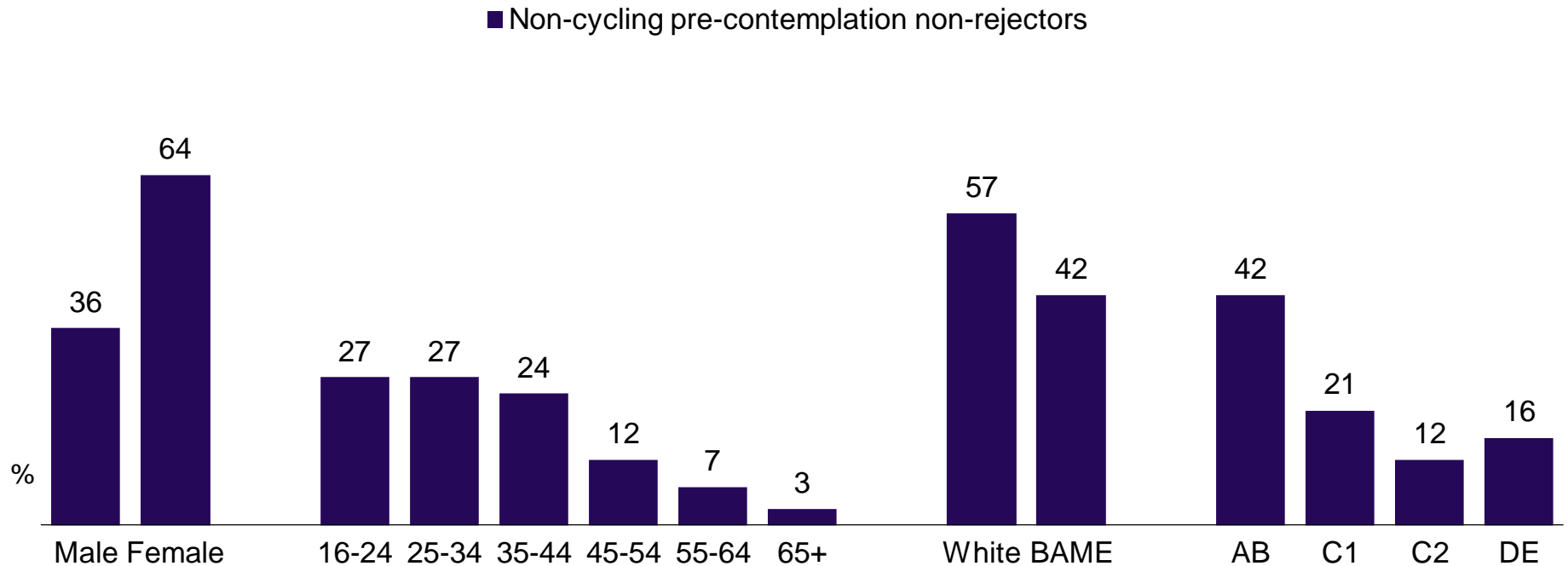
Demographic profile of cyclists in London



Base: All cyclists (532)



Demographic profile of non-cycling pre-contemplation non-rejectors in London

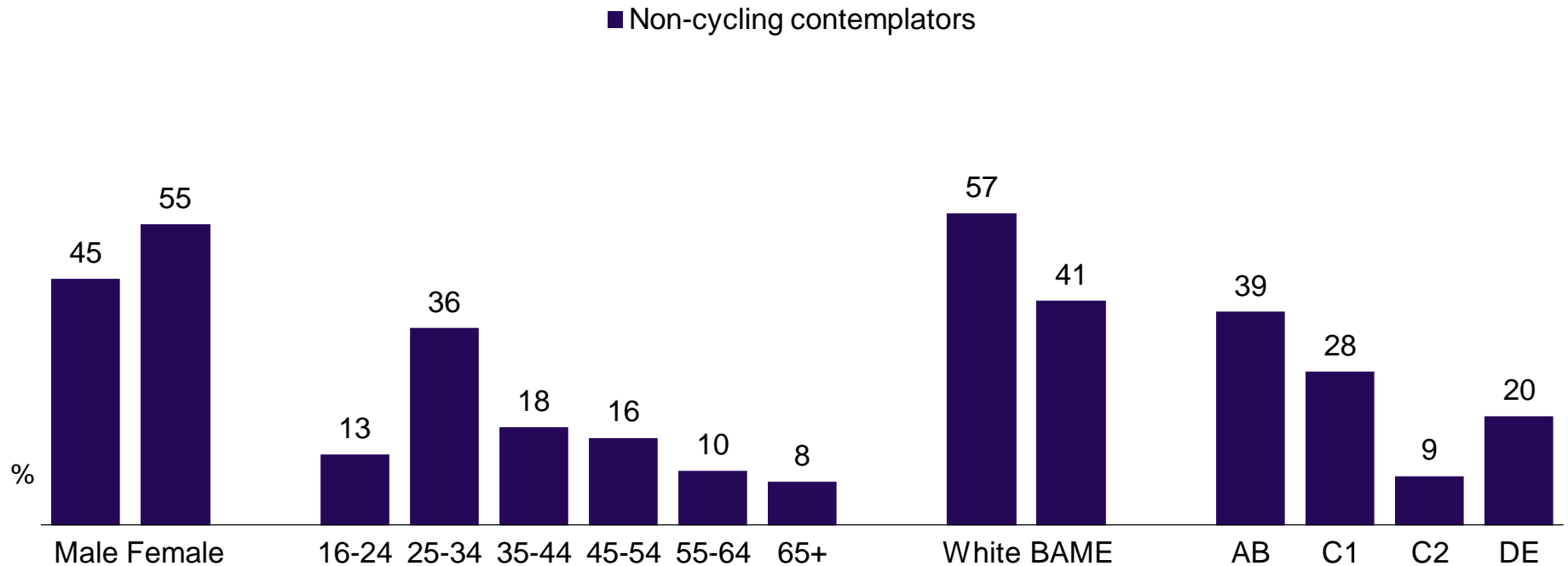


Base: All non-cycling pre-contemplation non-rejectors* (71)

*'You have never thought of starting but could be open to it'



Demographic profile of non-cycling contemplators in London



Base: All non-cycling contemplators* (57)

*'You are thinking about starting soon'



Biking borough comparison





Biking boroughs

Methodology

- ➔ In addition to the interviews with Londoners in general, a further 425 interviews were carried out in 'biking boroughs' (which receive special support from TfL in relation to cycling initiatives)
 - These boroughs are Barking & Dagenham, Bexley, Brent, Bromley, Croydon, Ealing, Haringey, Havering, Hillingdon, Hounslow, Kingston-upon-Thames, Merton and Redbridge
- ➔ This boost gave us a total sample of 840 interviews in biking boroughs, equating to approximately 60 interviews per borough
 - At a total sample level this provides reasonable confidence in the findings, however it is not possible to reliably break the sample down to provide findings on a borough by borough level
- ➔ These slides compare findings from London as a whole against those from the biking boroughs
 - Where we have reported 'total' findings, these include 415 interviews from biking boroughs gathered from the main stage of interviewing, with the remainder coming from other London boroughs

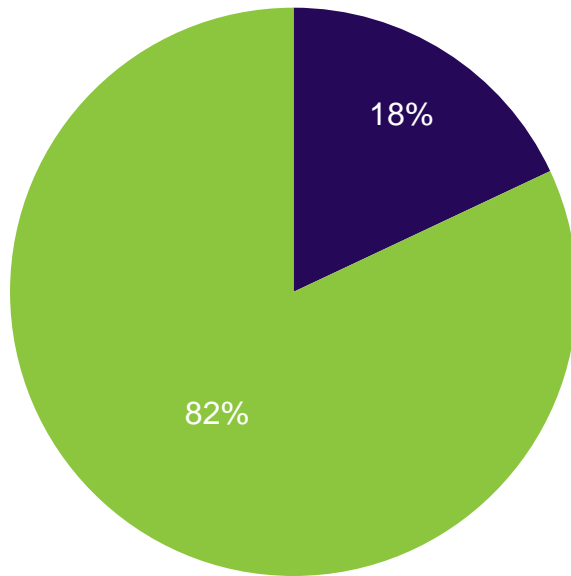


Incidence of cycling

**Total
Cyclists and non-cyclists**

■ Cyclist

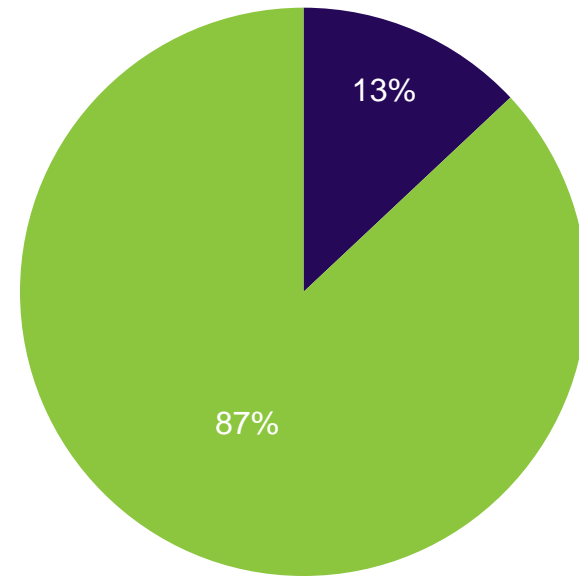
■ Non-cyclist



**Biking boroughs
Cyclists and non-cyclists**

■ Cyclist

■ Non-cyclist



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

QFREQ: Which of these modes of transport do you ever use to get around London?

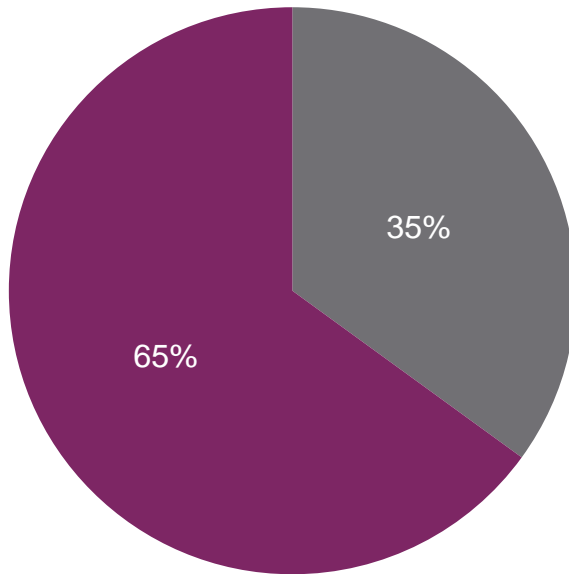
Base: All (Total, 1,373; biking boroughs, 840)



Frequency of cycling

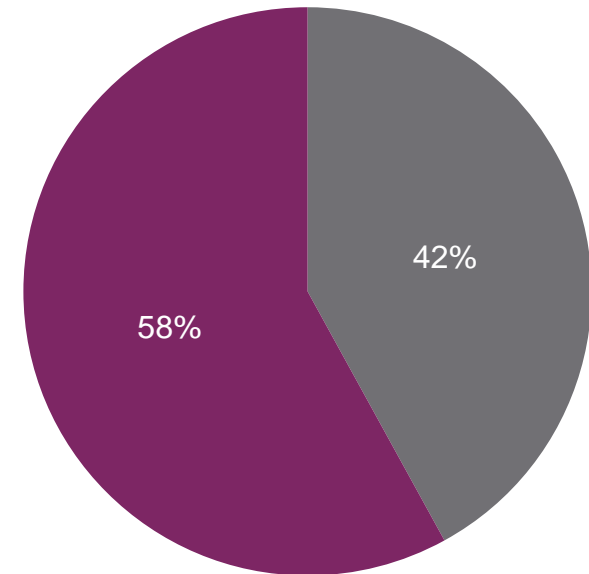
Total
Regular and occasional cyclists

■ Occasional cyclist ■ Regular cyclist



Biking boroughs
Regular and occasional cyclists

■ Occasional cyclist ■ Regular cyclist



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

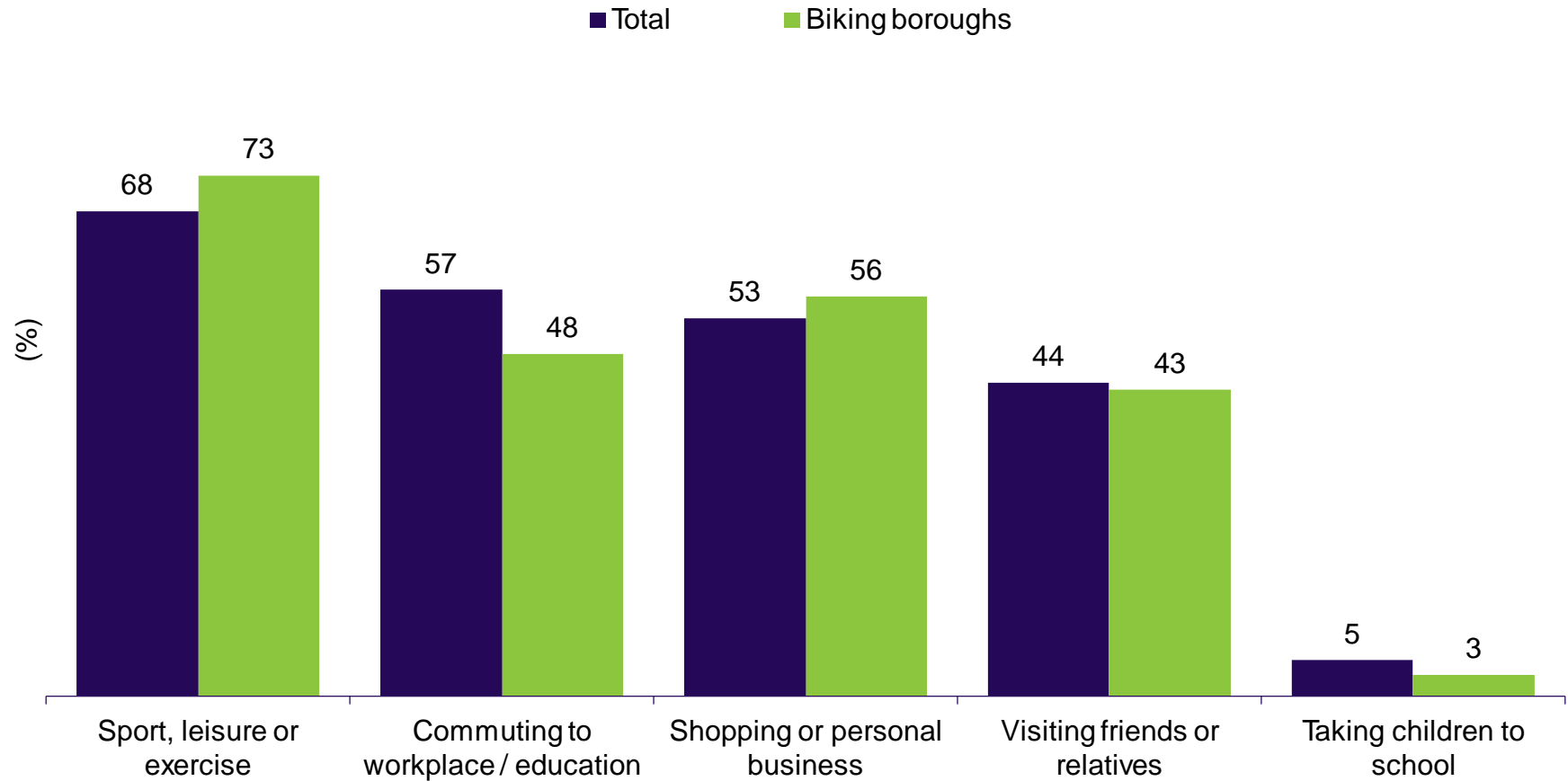
QFREQ_BIKE: Typically, how often do you use a bicycle to get around London?

Base: All cyclists (Total, 532; biking boroughs, 115)



Journey purposes

Cycling for different journey purposes



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

Base: All cyclists (Total, 532; biking boroughs, 115)

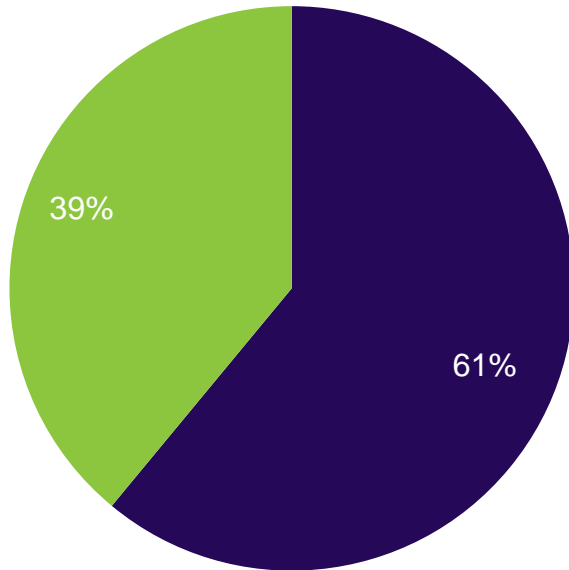


Commuting in London

Commuting in London

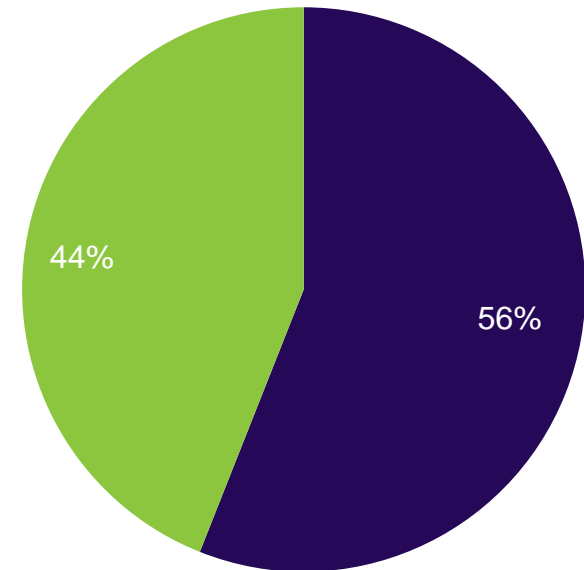
All Londoners

■ Yes ■ No



Biking Boroughs

■ Yes ■ No



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

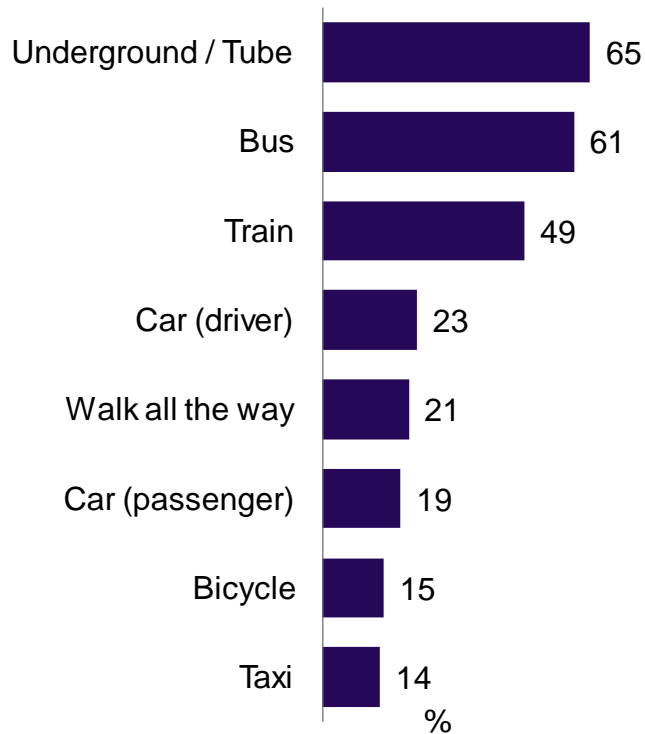
Base: All (Total, 1,373; biking boroughs, 840)



Commuting in London

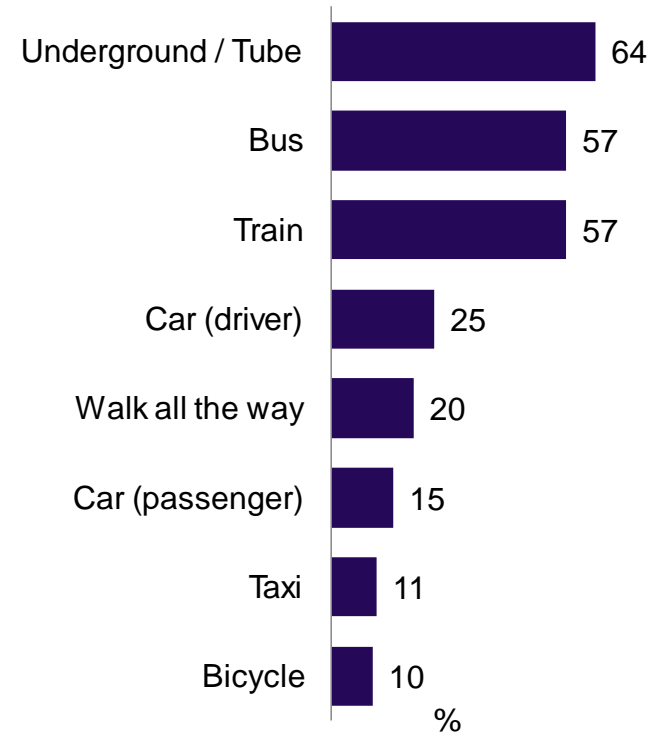
Commuting in London and modes used

Modes of transport for commuting (all Londoners)



Mentions above 13% shown

Modes of transport for commuting (Biking Boroughs)



Mentions above 9% shown

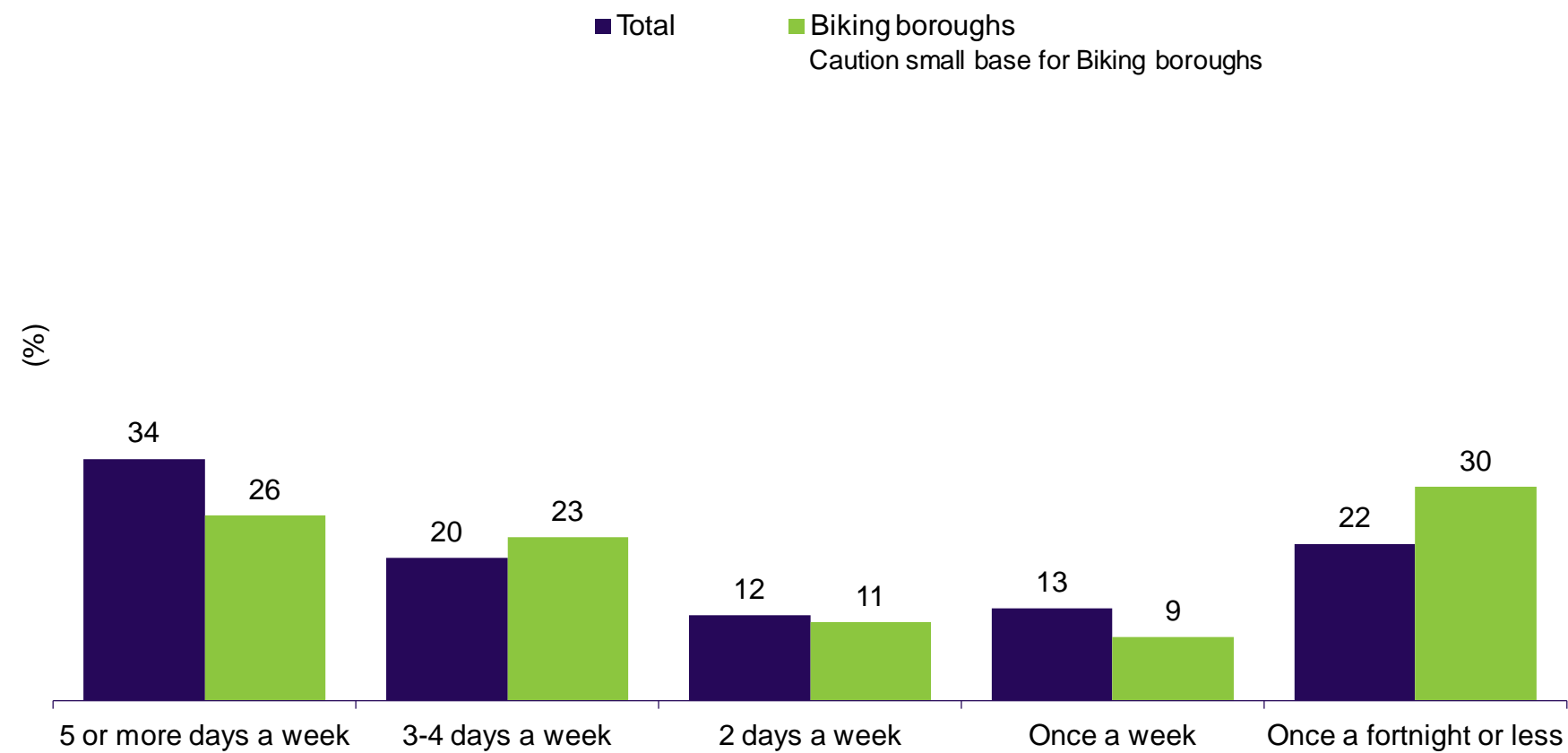
G2: Which types of transport do you use to commute in London?

Base: All who commute (Total, 817; biking boroughs, 397)



Frequency of commuting by bicycle amongst those that do at all

Frequency of commuting by bike

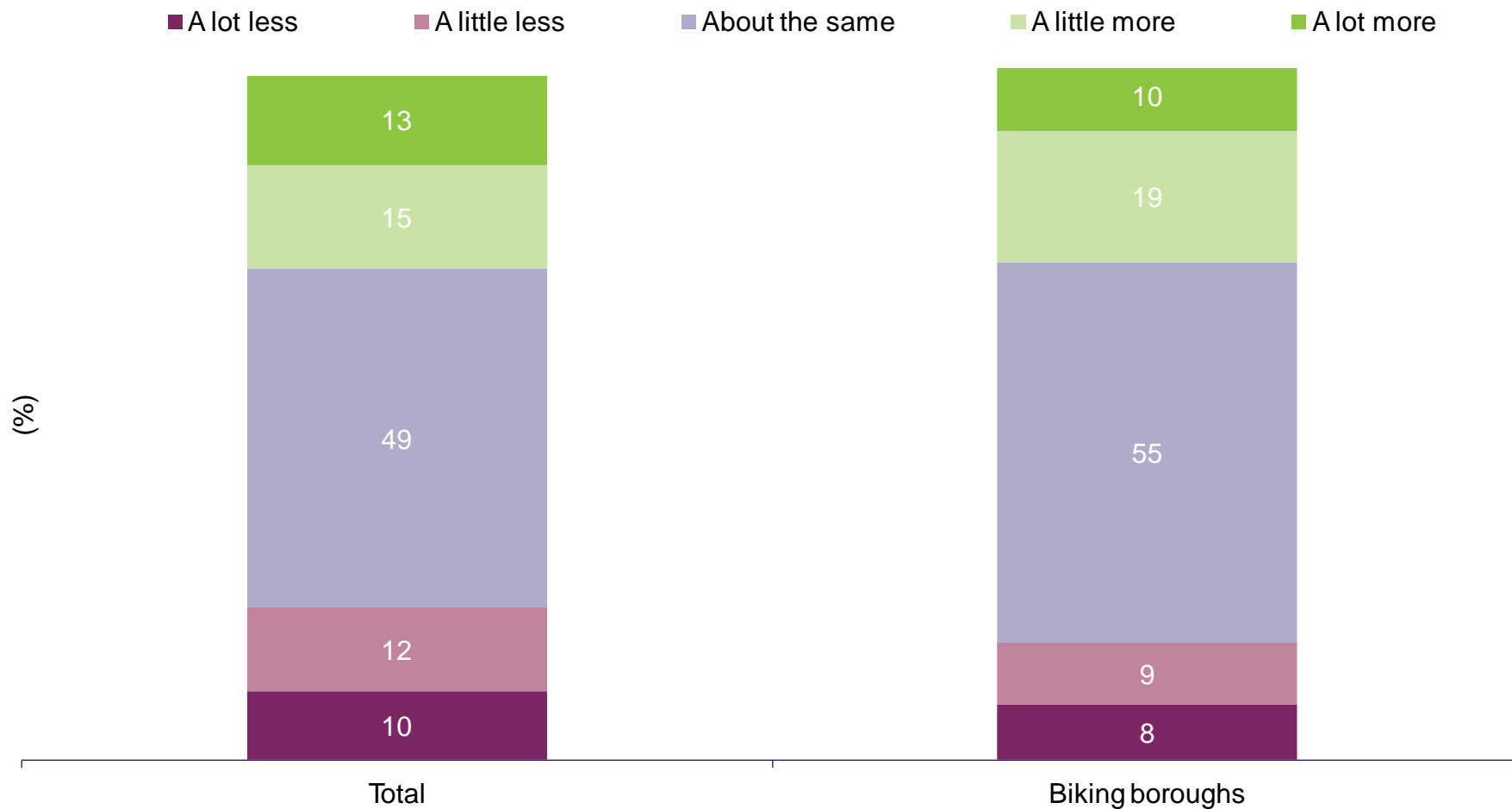


G3: Typically, how often do you cycle as a means of commuting in London?
Base: Those commuting by bike (Total, 234; biking boroughs, 47)



Change in level of cycling over the past year

Frequency of travelling by bike compared with last year



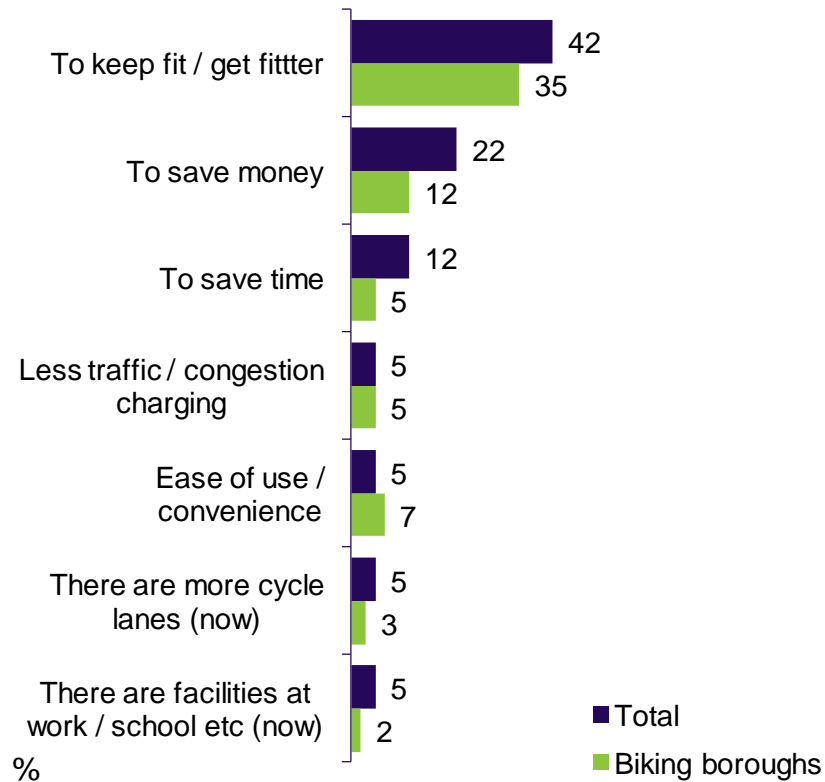
D1. How do you think the amount you cycle in London is compared to this time last year? Would you say you now cycle...?

Base: All cyclists (Total, 532; biking boroughs, 115)



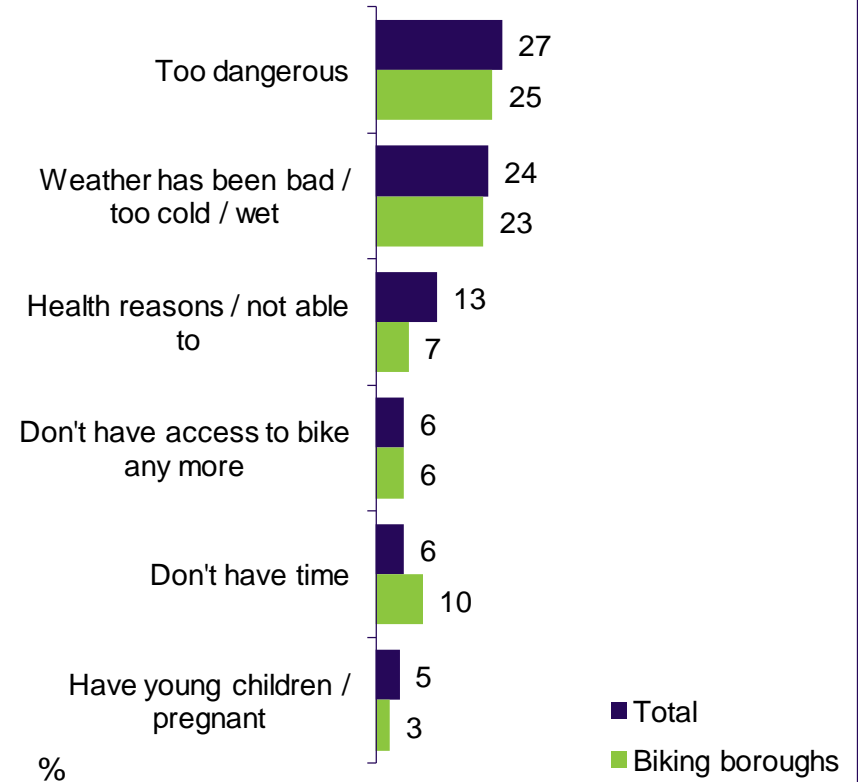
Reasons for change in cycling frequency

Reasons for cycling more



D2. What are the reasons that you have started cycling more this year?
Base: All cycling more (Total, 168; biking boroughs, 62)

Reasons for cycling less



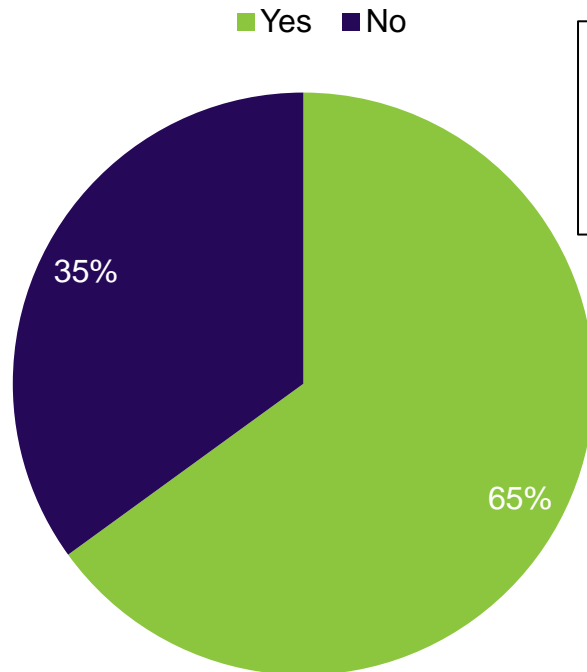
D4. What are the reasons that you are cycling less this year?
Base: All cycling less (Total, 240; biking boroughs, 132)



Children's cycling

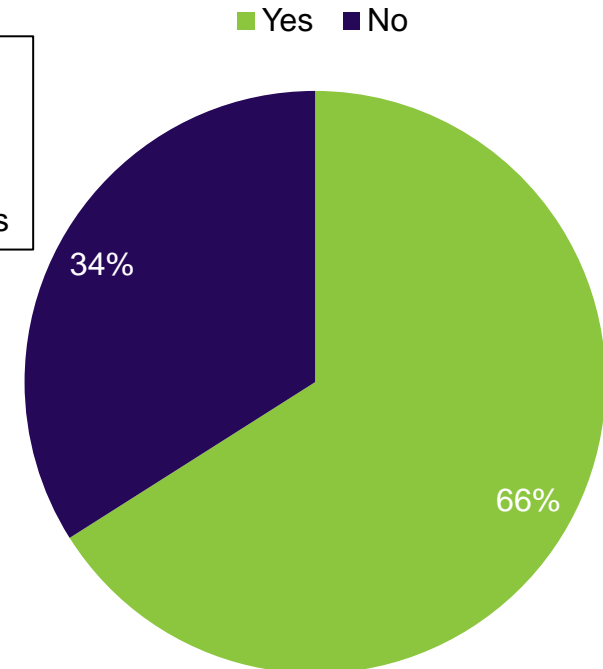
Whether children in the household have access to a bike / cycle

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



14% of children in London who own a bike cycle to school at least once a week, compared with 11% of those in biking boroughs

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



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

Base: All with children (Total, 377; biking boroughs, 214)

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

Base: All with children who own a bike (Total, 273; biking boroughs, 150)



Behaviour change model – definitions

	Grouping	Cyclists Total sample	Cyclists Biking boroughs
You have never thought about it, but would be unlikely to start in the future	Pre-contemplation	4%	2%
You have thought about it but don't intend starting in the future	Pre-contemplation	8%	6%
You have never thought about it but could be open to it in the future	Pre-contemplation	4%	4%
You are thinking about starting soon	Contemplation	9%	12%
You have decided to start soon	Preparation	3%	6%
You have tried to start recently, but are finding it difficult	Change	4%	3%
You have started recently and are finding it quite easy so far	Change	6%	4%
You started a while ago and are still doing it occasionally	Sustained change	25%	27%
You started a while ago and are still doing it regularly	Sustained change	33%	28%
You had started doing this but couldn't stick to it	Lapsed	3%	5%

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

Base: All cyclists in the last 12 months (Total, 516; biking boroughs, 111)



Behaviour change model – definitions

	Grouping	Non-cyclists Total sample	Non-cyclists Biking boroughs
You have never thought about it, but would be unlikely to start in the future	Pre-contemplation	31%	30%
You have thought about it but don't intend starting in the future	Pre-contemplation	32%	31%
You have never thought about it but could be open to it in the future	Pre-contemplation	10%	10%
You are thinking about starting soon	Contemplation	7%	7%
You have decided to start soon	Preparation	1%	1%
You have tried to start recently, but are finding it difficult	Change	1%	3%
You have started recently and are finding it quite easy so far	Change	1%	*
You started a while ago and are still doing it occasionally	Sustained change	6%	8%
You started a while ago and are still doing it regularly	Sustained change	1%	1%
You had started doing this but couldn't stick to it	Lapsed	8%	7%

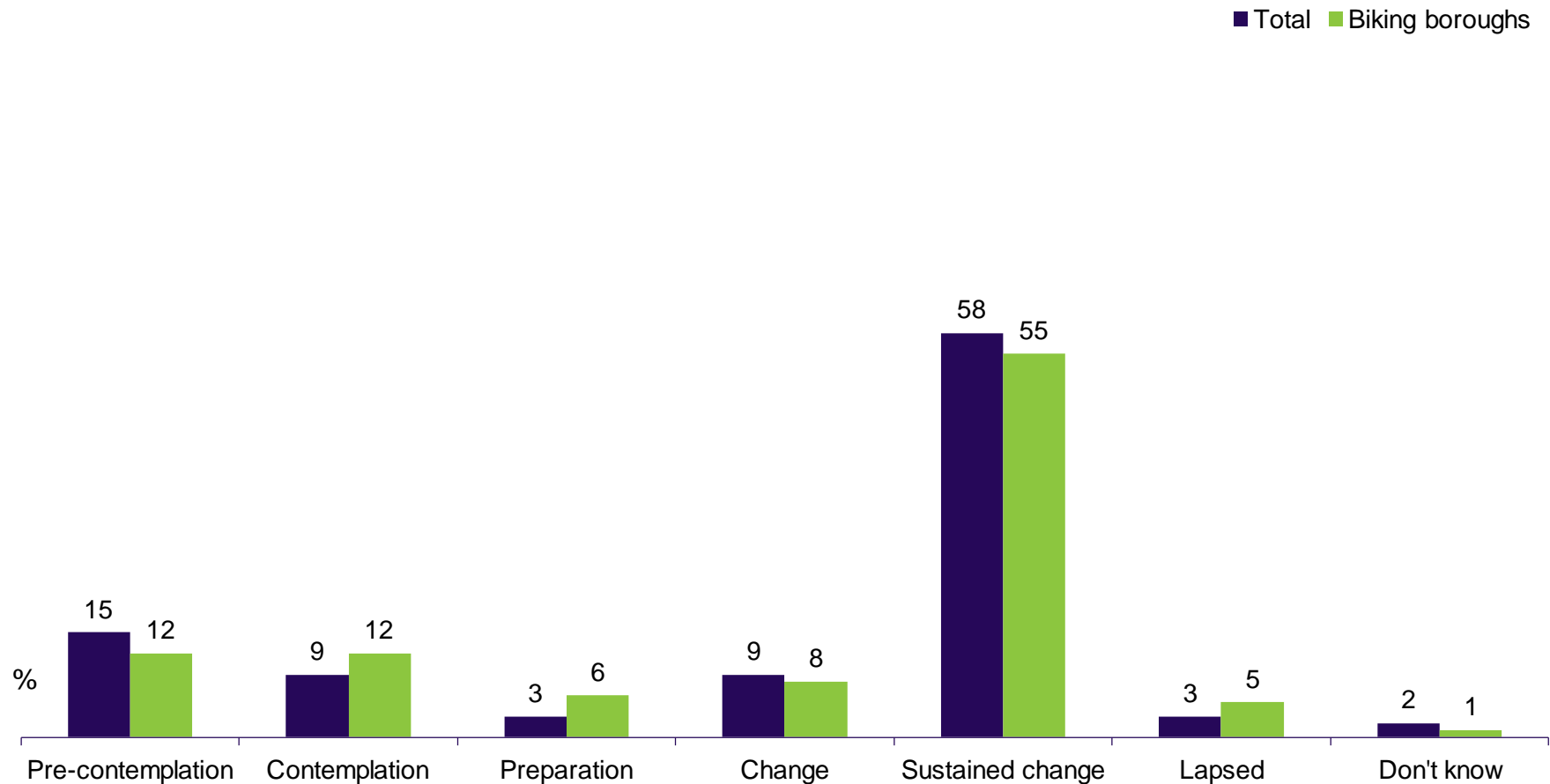
B2: Thinking about the possibility of "taking up cycling", which of these descriptions would you say most applies to you?

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



Behaviour change model – cyclists

Behaviour change model



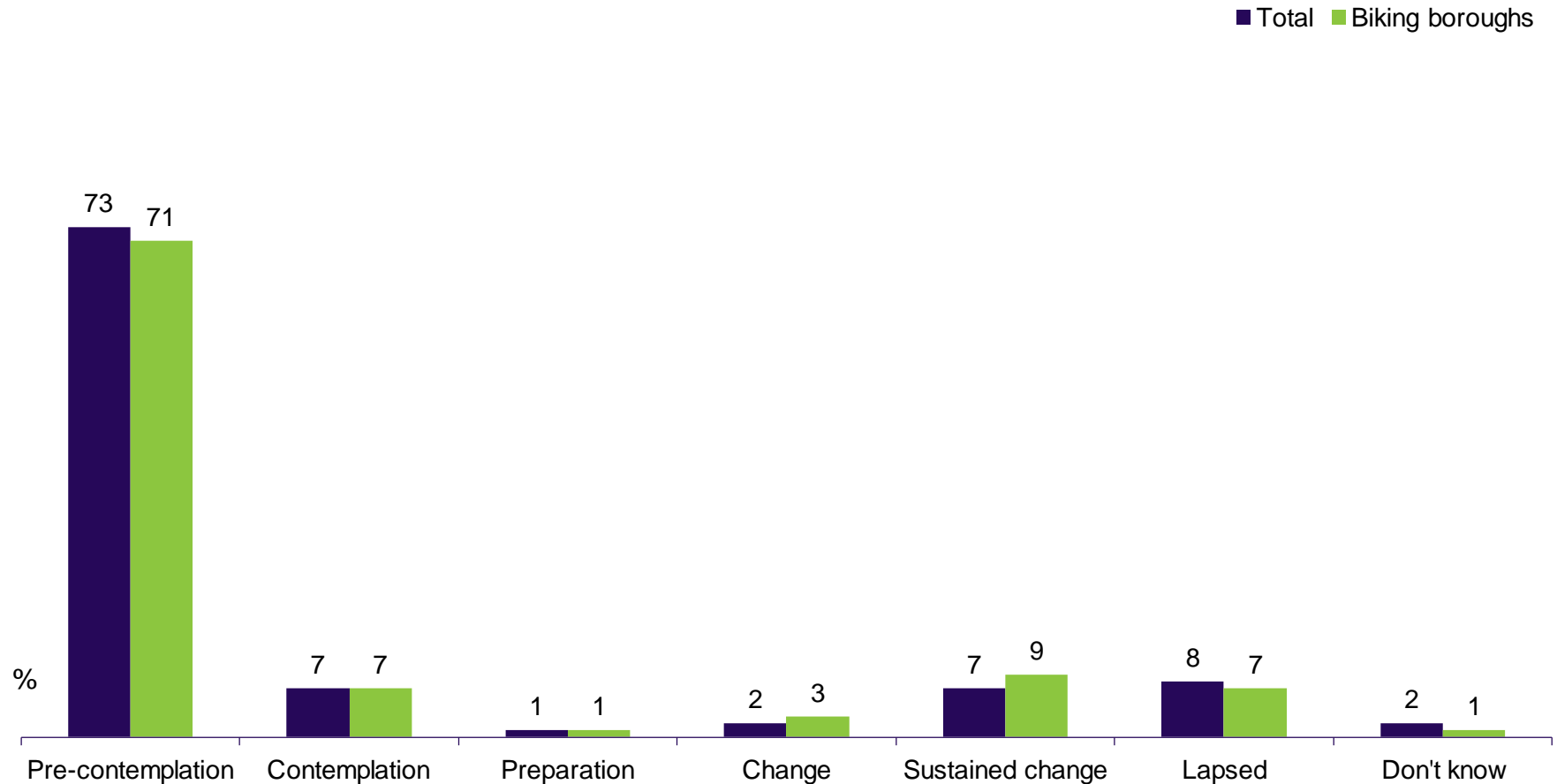
B1: Thinking about the possibility of “cycling more” which of these descriptions would you say MOST applies to you?

Base: All cyclists in the last 12 months (Total, 516; biking boroughs, 111)



Behaviour change model – non-cyclists

Behaviour change model



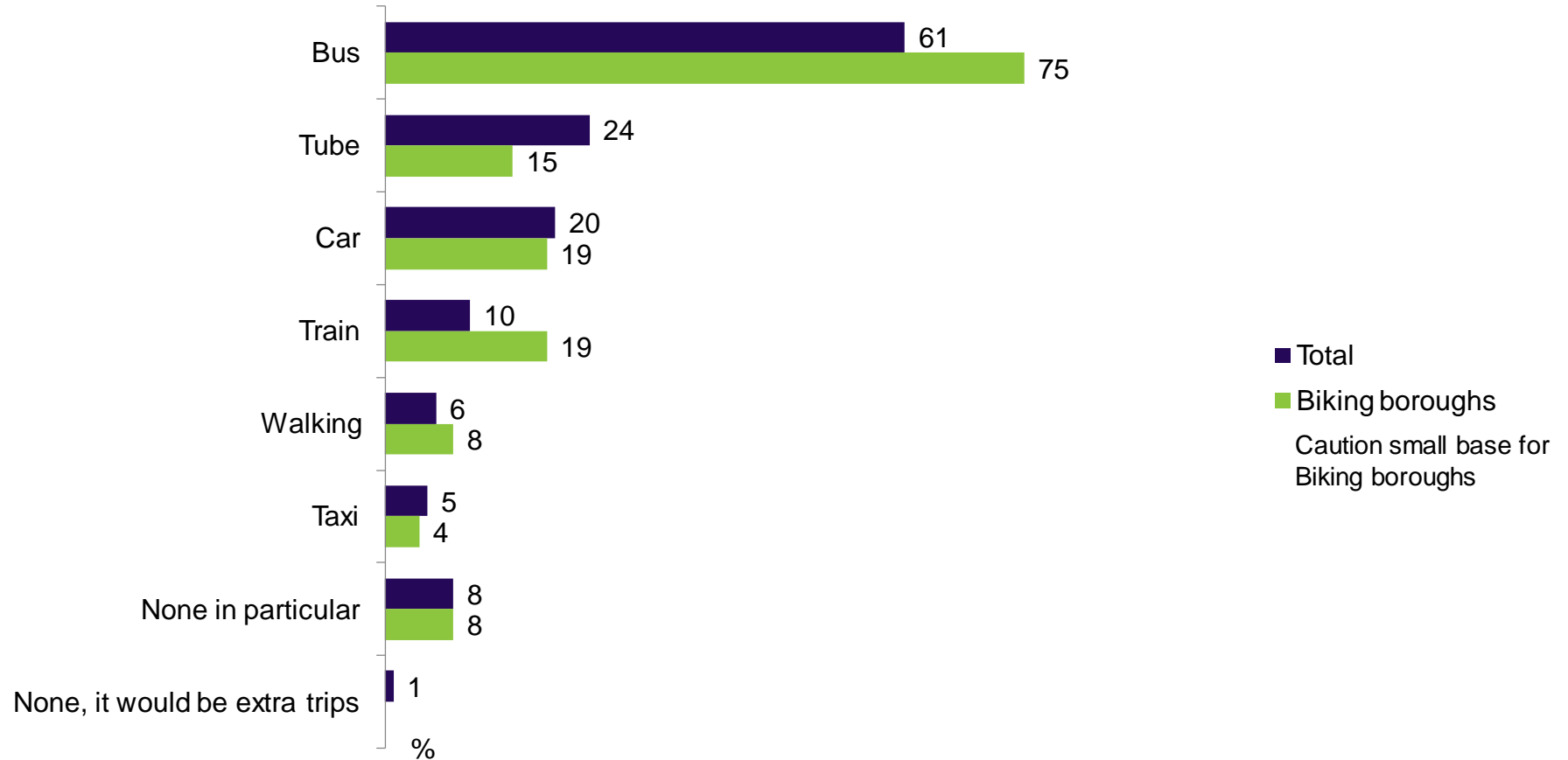
B2: Thinking about the possibility of “taking up cycling”, which of these descriptions would you say most applies to you?

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



Potential modal shift

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

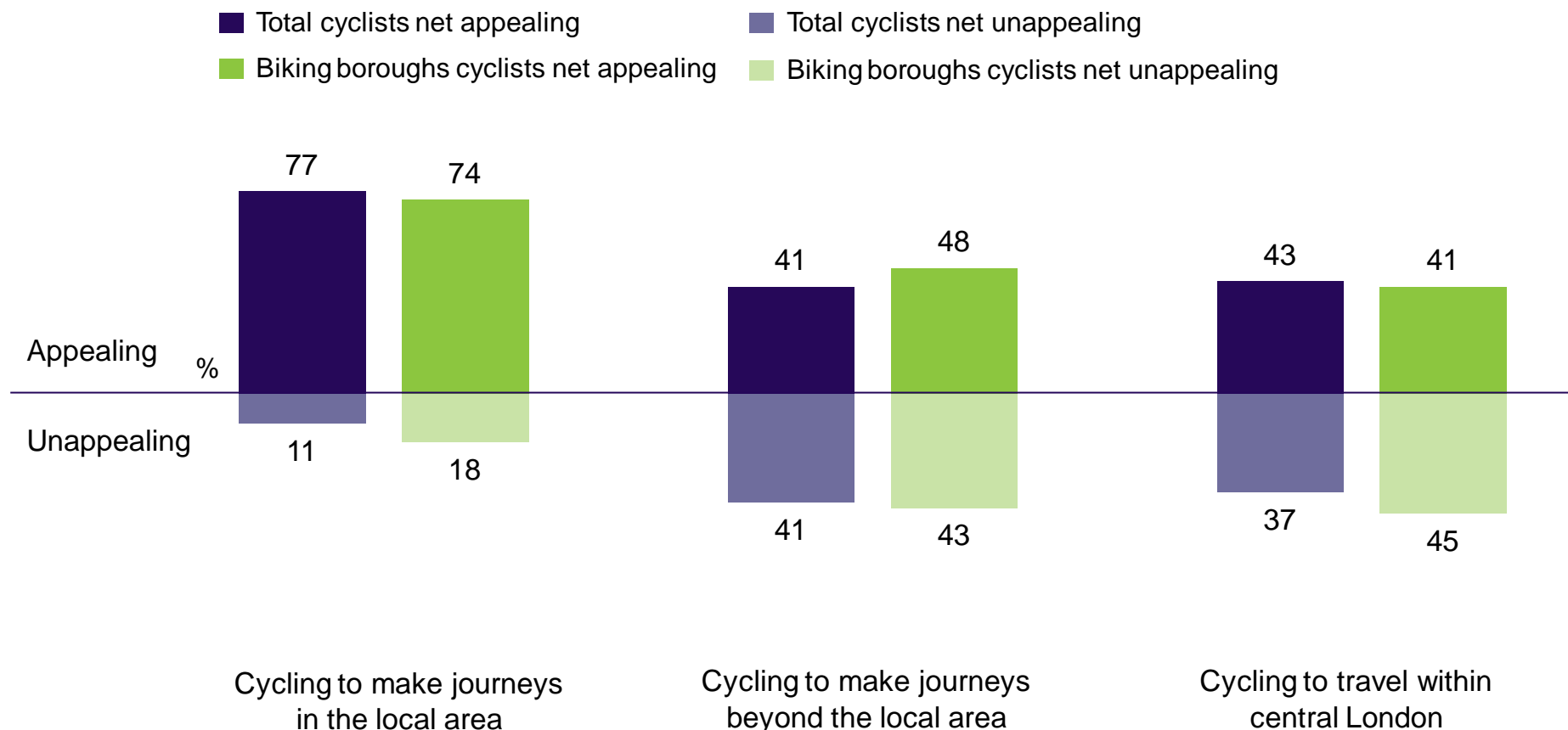


E5: What type of transport, if any, would you use less if you cycled more?

Base: all cyclists in the last 12 months planning to cycle more (Total, 82; biking boroughs, 23)

→ Appeal of cycling scenarios

Appeal of cycling in specific scenarios – cyclists



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

Base: All cyclists except those who find cycling very unappealing (Total, 500; biking boroughs, 108)



Agreement with statements about cycling in London

	Total (%)	Biking boroughs (%)
Cycling is becoming more popular	84	84
Cycling is enjoyable	81	80
Cycling is a good social activity	77	73
Cycling is a method of transport that you would want to be seen using	57	53
Cycling is a method of transport that I would use and/or recommend	52	49
Cyclists are vulnerable to other road users	90	88
Traffic makes people afraid of cycling on London streets	85	86
Cycling is a safe way of getting about	29	27
I feel confident cycling on London's roads	27	20
Cycling is a convenient way of getting around	79	78
Cycling is the fastest way to travel for short journeys	76	71
Cycling gets you to your destination when you expect to arrive	72	67
I can accurately estimate my journey time when travelling by bike	57	53
Cycling is not for people like me	36	40
My local area is good for cycling	60	58
I see lots of people cycling in and around my local area	62	55
Information and signs make it easy to find your way when cycling	59	54
There are good facilities for cyclists in London	54	52
London is a city for cycling	42	41

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

Base: All (Total, 1,373; biking boroughs, 840)



Satisfaction with cycle parking facilities

Satisfaction with cycle parking facilities at different locations

	Satisfied (%)		Dissatisfied (%)	
	Total	Biking boroughs	Total	Biking boroughs
At your workplace	54	48	17	21
At London train / Tube stations	40	38	27	26
On London's streets	39	36	31	34
Near your home	38	33	41	44

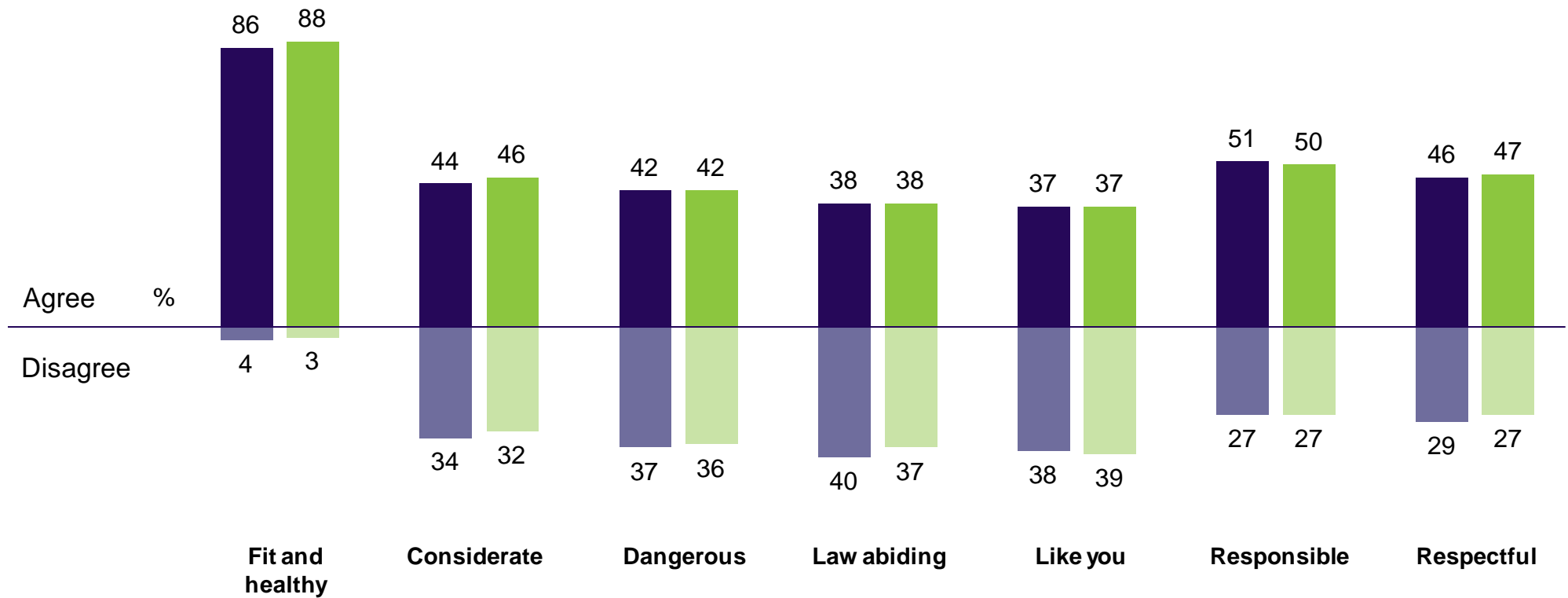
A3: How would you rate your level of satisfaction with the parking facilities for bicycles in London?

Base: All cyclists (Total, 532; biking boroughs, 115)



Opinions of cyclists

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



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

Base: All (Total: 1,373, biking boroughs: 840)



Perceptions of cycling infrastructure

Ranking of potential deterrents

	Good (%)		Poor (%)	
	Total	Biking boroughs	Total	Biking boroughs
Availability of information on cycle routes	52	48	23	32
Availability of cycle lanes	34	34	48	45
Safety of cycling	26	27	49	52
Security of bike when it is left	26	25	48	50

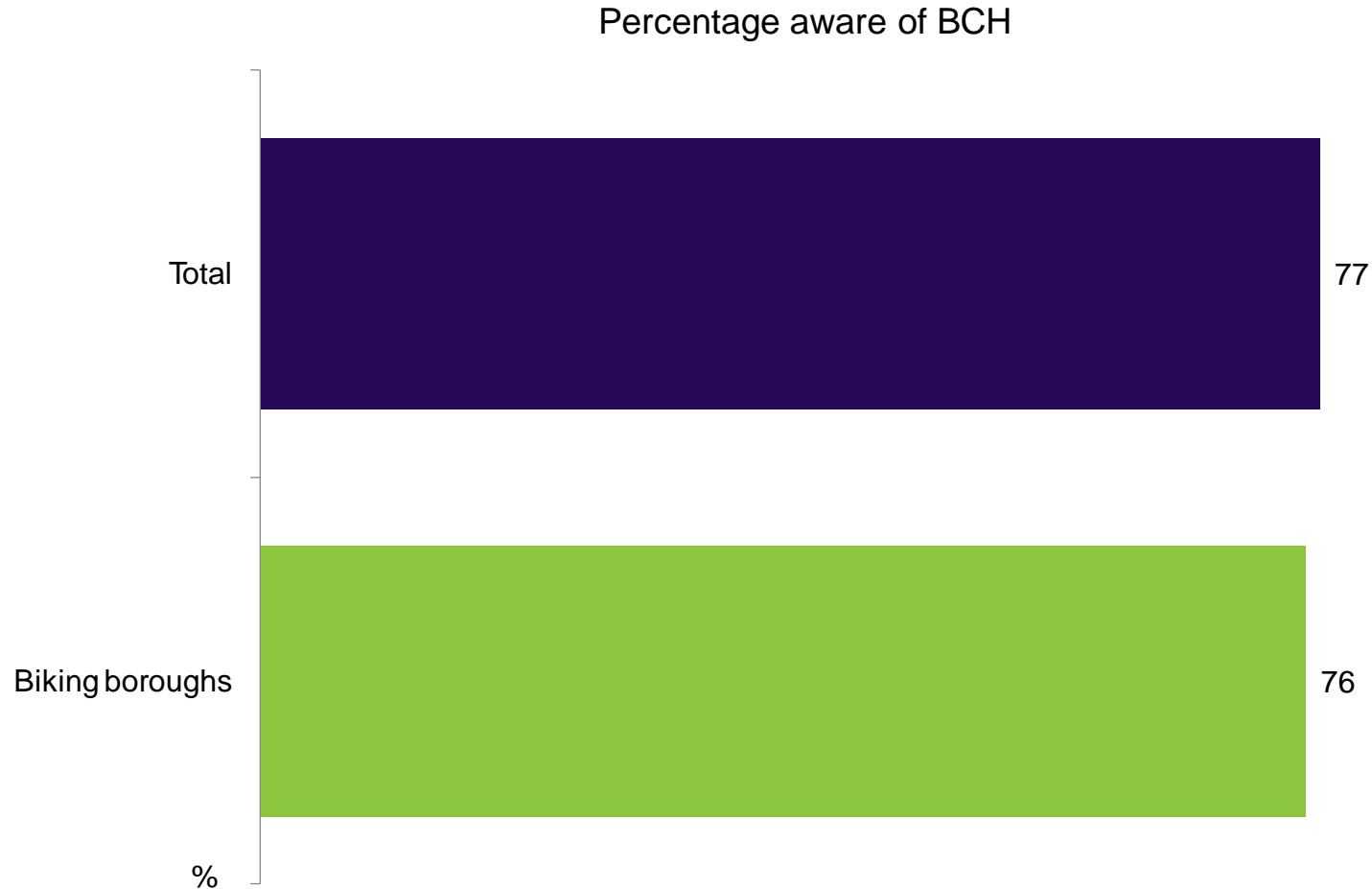
A2: How would you rate the following aspects of cycling in London?

Base: 2013: all cyclists (Total: 532, biking boroughs: 115)



Awareness of Barclays Cycle Hire

Awareness of Barclays Cycle Hire



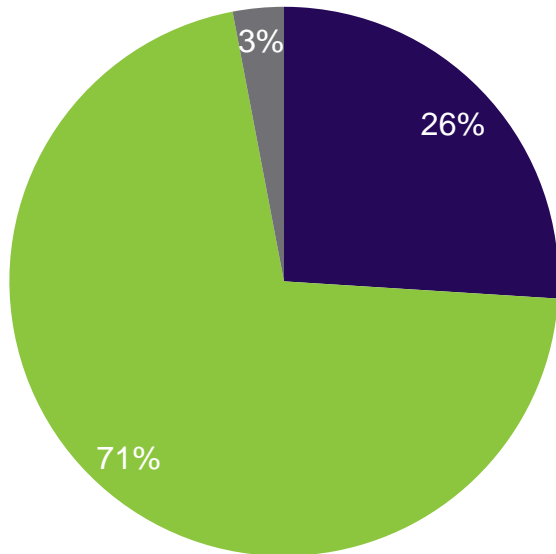


Intended use of BCH

Intended use

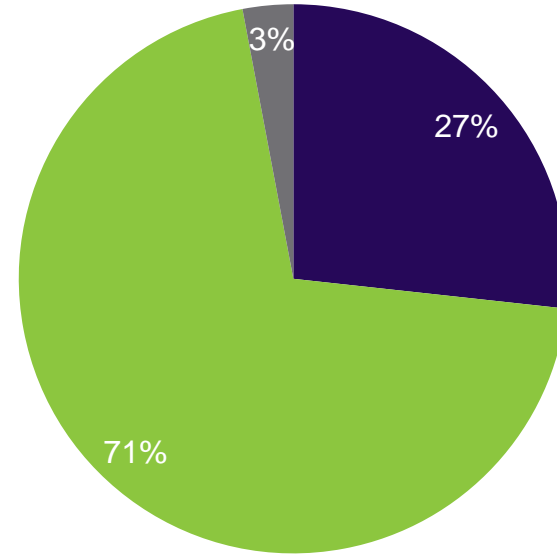
Intention to use
Total

■ Yes ■ No ■ Don't know



Intention to use
Biking boroughs

■ Yes ■ No ■ Don't know



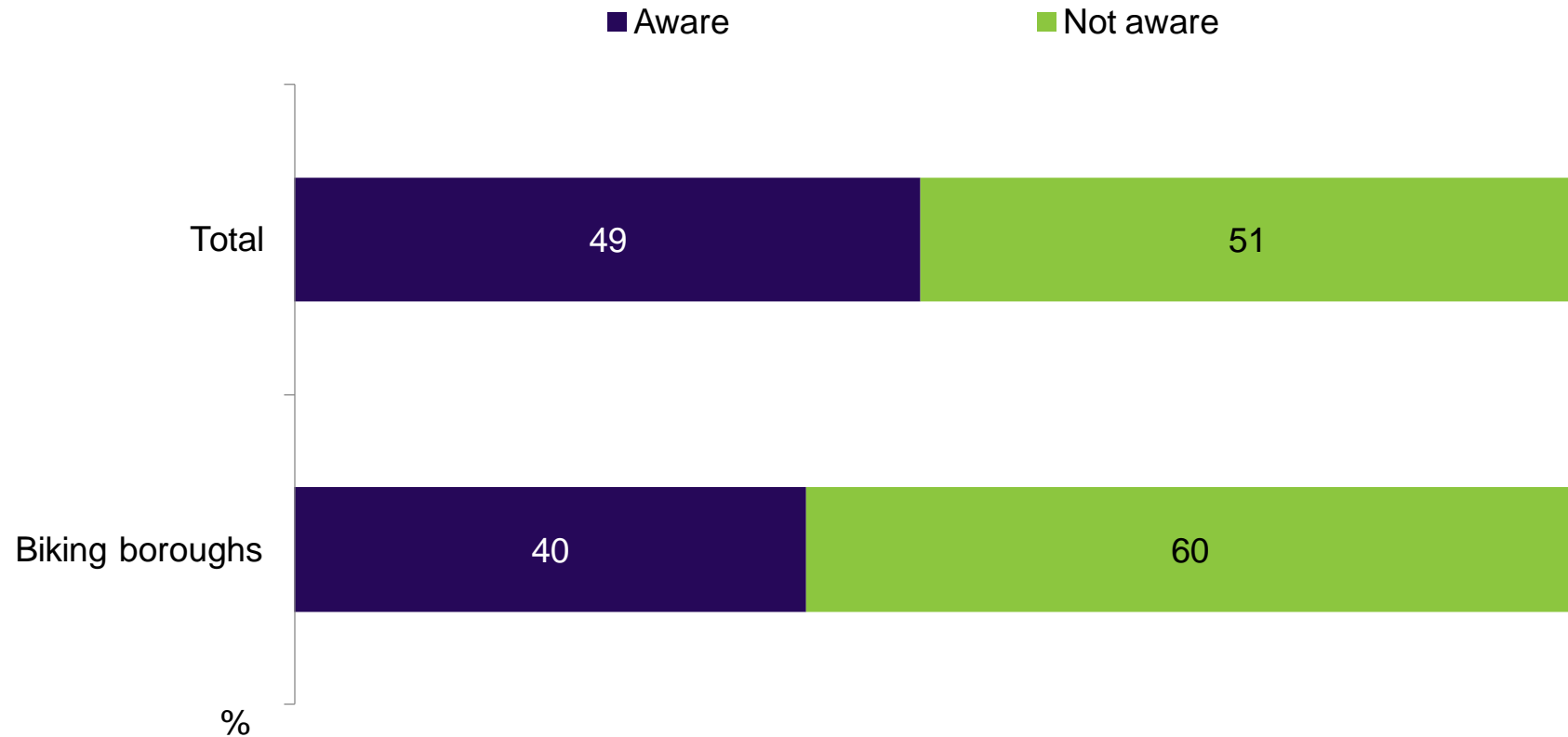
N3: Do you intend to use Barclays Cycle Hire in the future?

Base: All Barclays Cycle Hire Non-Users (Total, 1,235; biking boroughs, 808)



Awareness of Eastern and Southern expansion areas

Eastern and Southern expansion areas



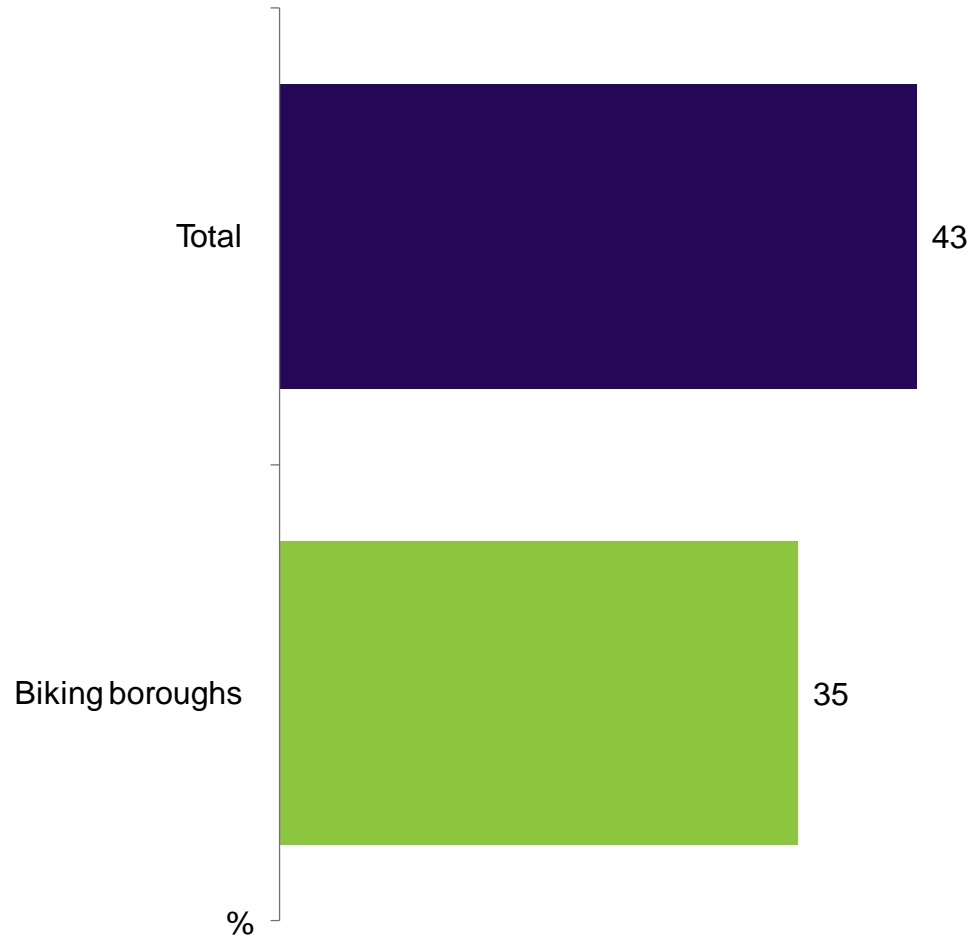
N7: Were you aware that the area covered by Barclays Cycle Hire is expanding from Central London to include more of East London and South London?

Base: Those aware of Barclays Cycle Hire (Total, 752; biking boroughs, 629)



Awareness of Barclays Cycle Superhighways

Awareness of Barclays Cycle Superhighways

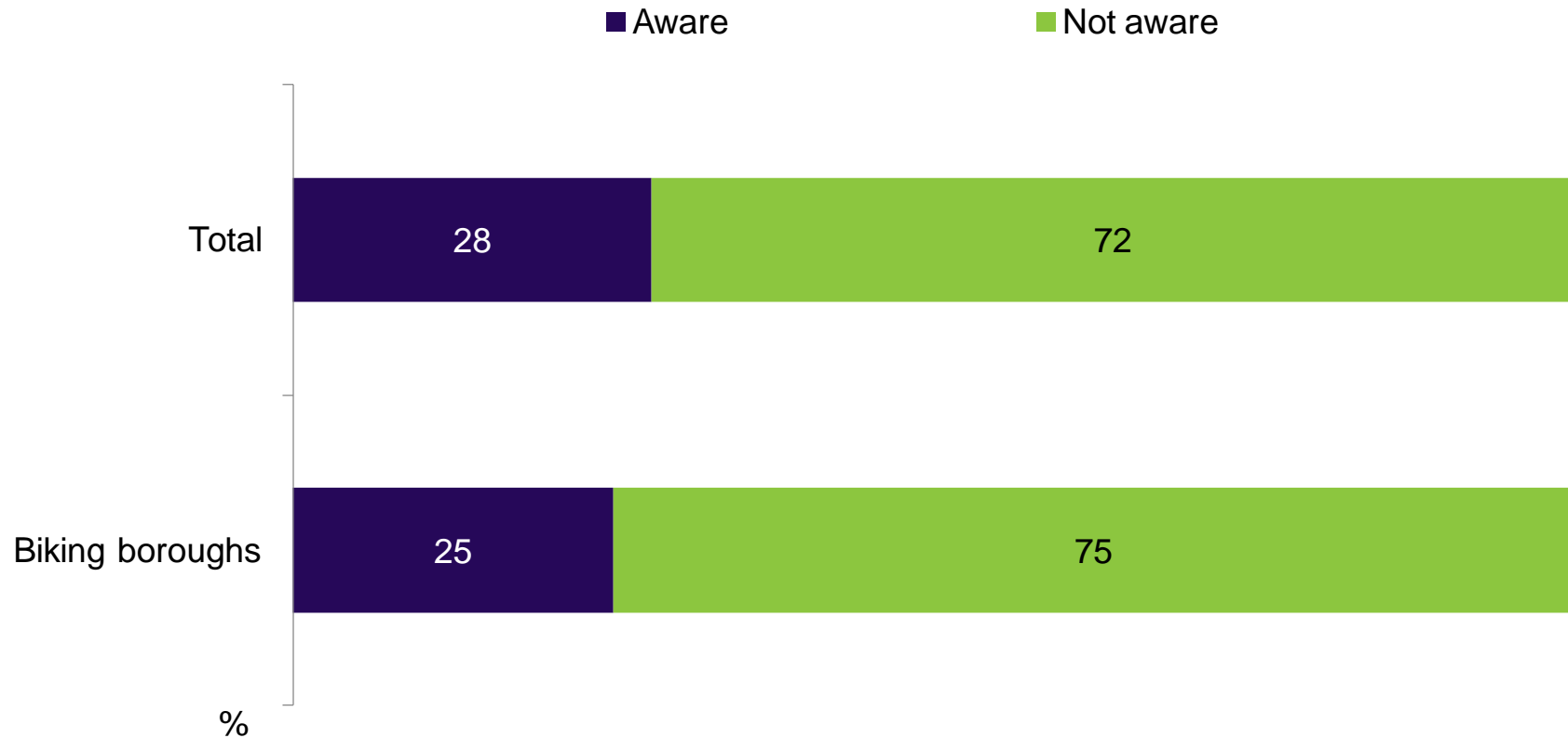


M1: Are you aware of Barclays Cycle Superhighways?
Base: All (Total 1,373; biking boroughs, 840)



Awareness of extent of BCSH network

Awareness that there will be 12 BCSH routes in total



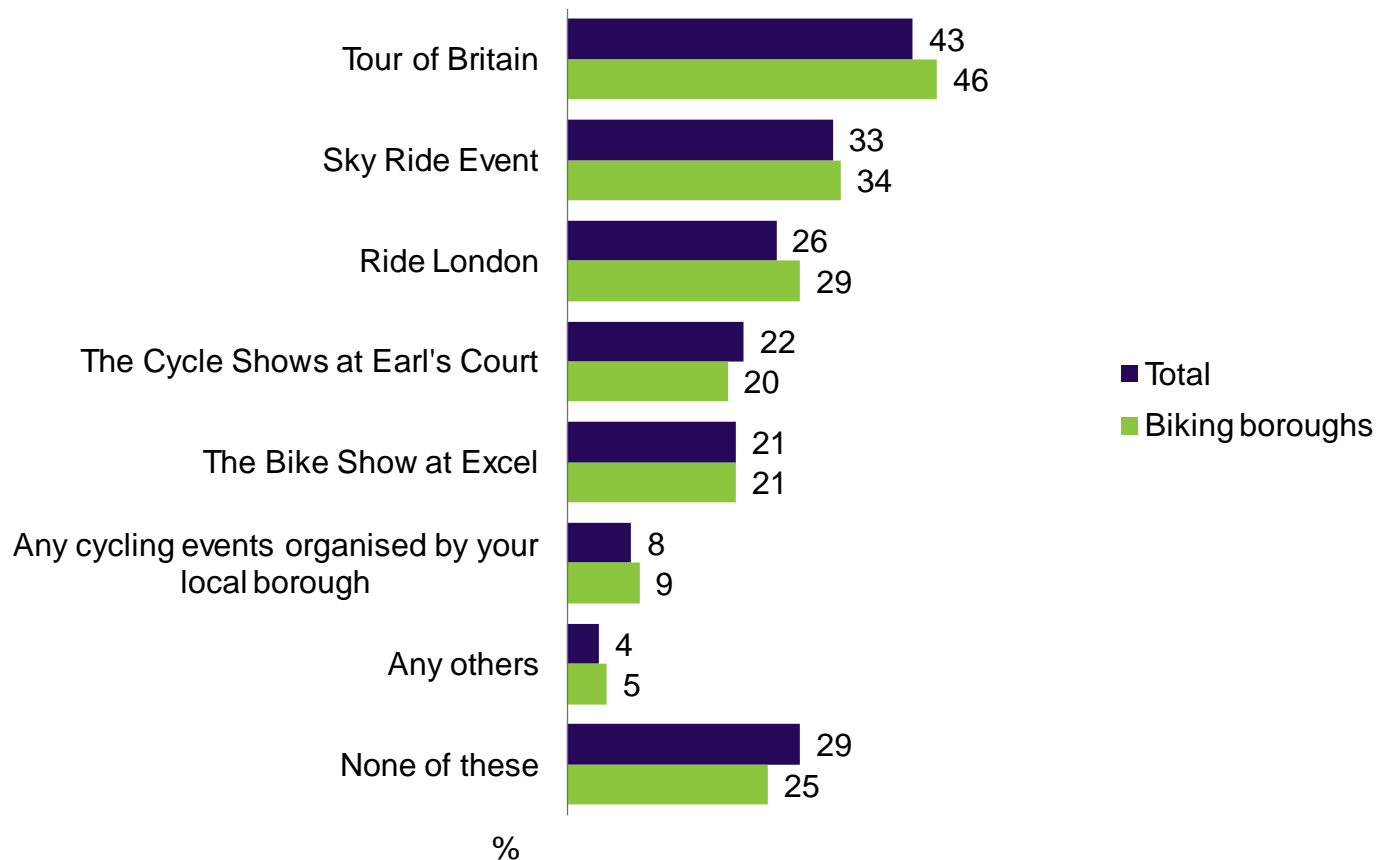
M8. Were you aware that only four out of twelve Barclays Cycle Superhighways have currently been built and that the scheme will be expanded over the coming years?

Base: Those aware of Barclays Cycle Superhighways (Total, 616; biking boroughs, 297)



Awareness of non-Olympic cycling events

Awareness of non-Olympic cycling events



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

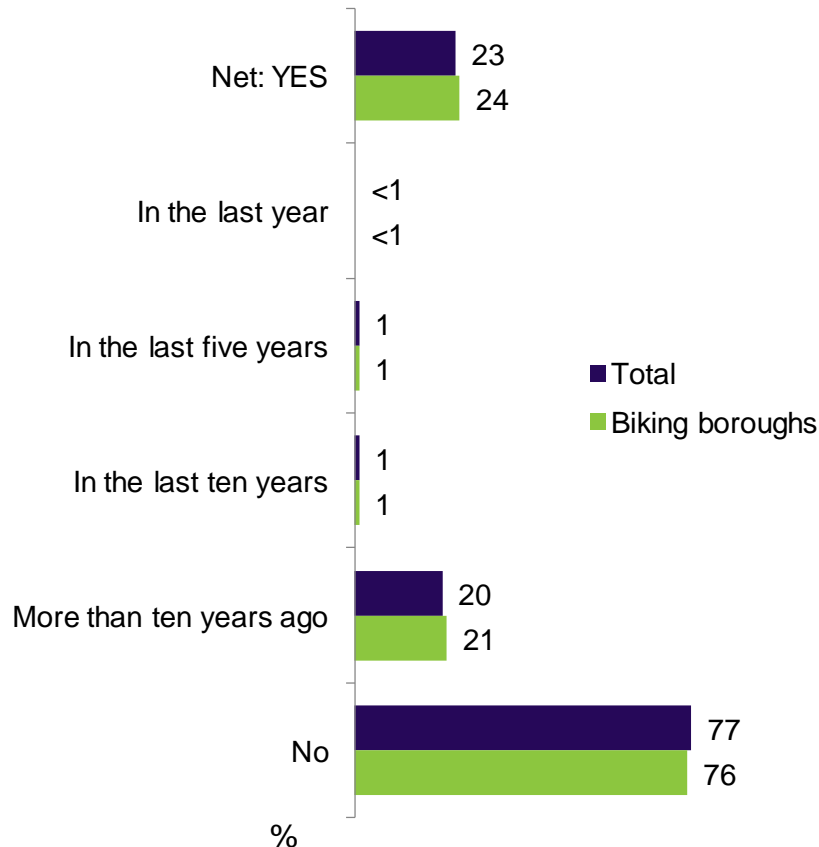
Base: All (Total, 1,373; biking boroughs, 840)



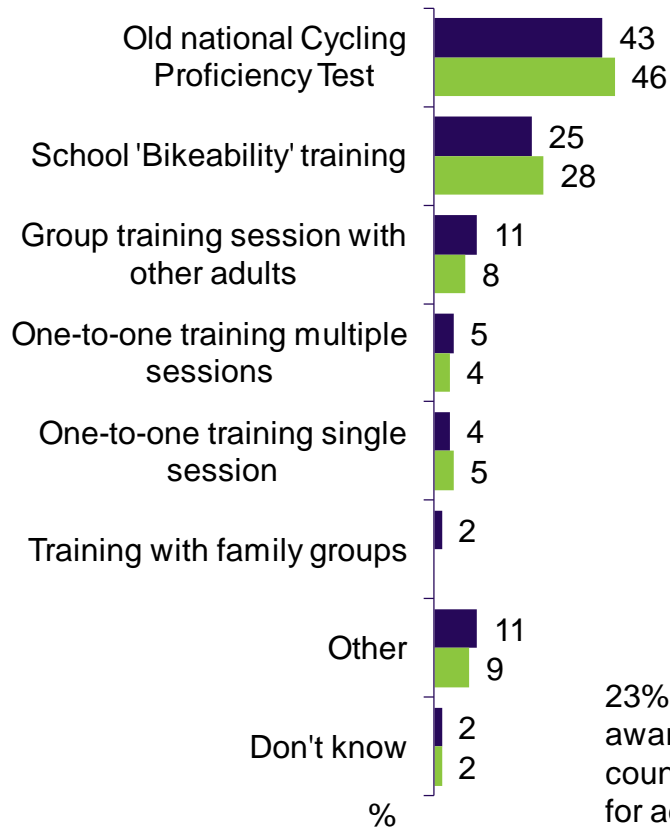
Experience of cycle training

Experience of cycle training

Cycle training attendance



Type of cycle training attended



23% of Londoners are aware that most local councils offer cycle training for adults, compared with 25% of those in biking boroughs

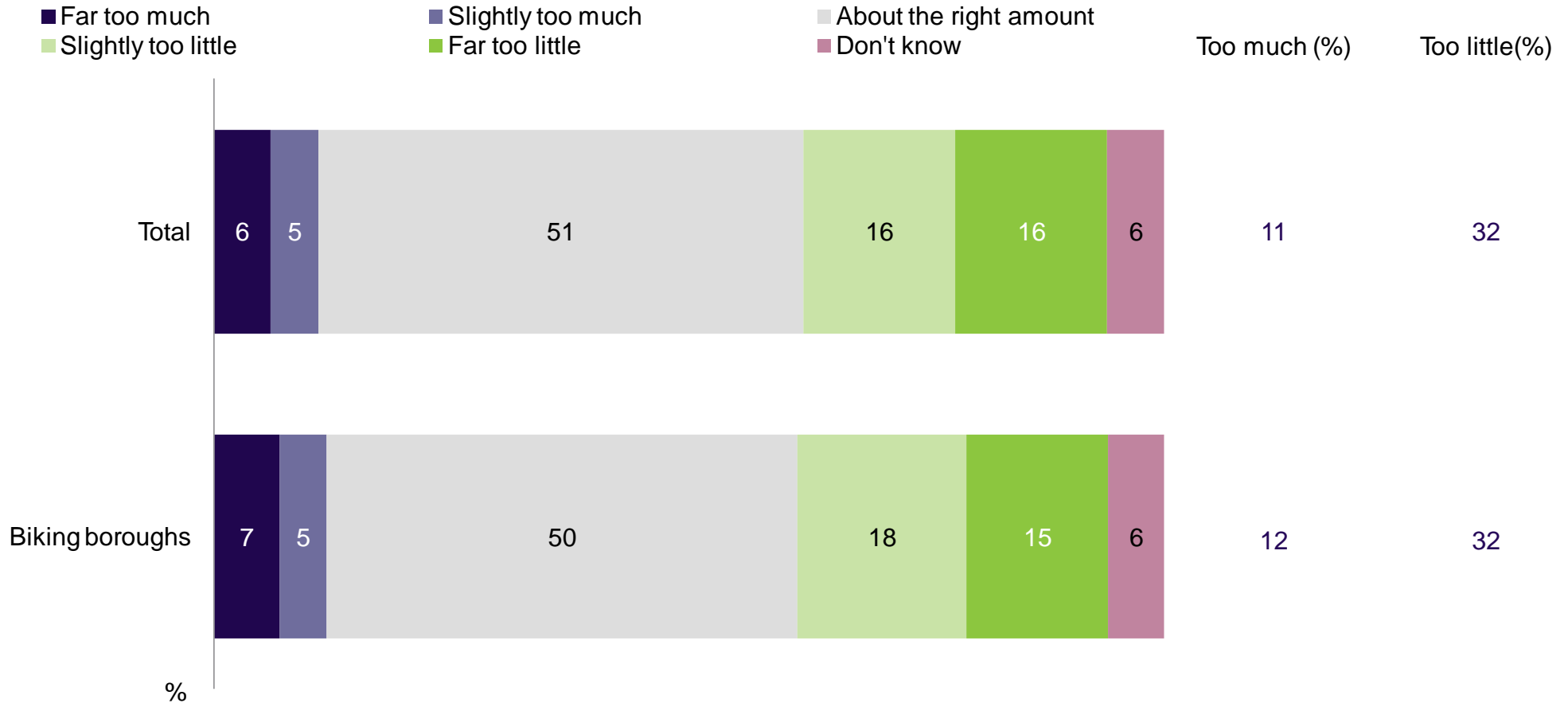
Q1: Have you ever attended any cycle training? Base: all (total, 1,373; biking boroughs, 840)

Q3: What sort of cycle training did you have? Base: All those who have attended cycle training (Total, 340; biking boroughs, 188)



Views on investment in cycling

Investment levels in cycling



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

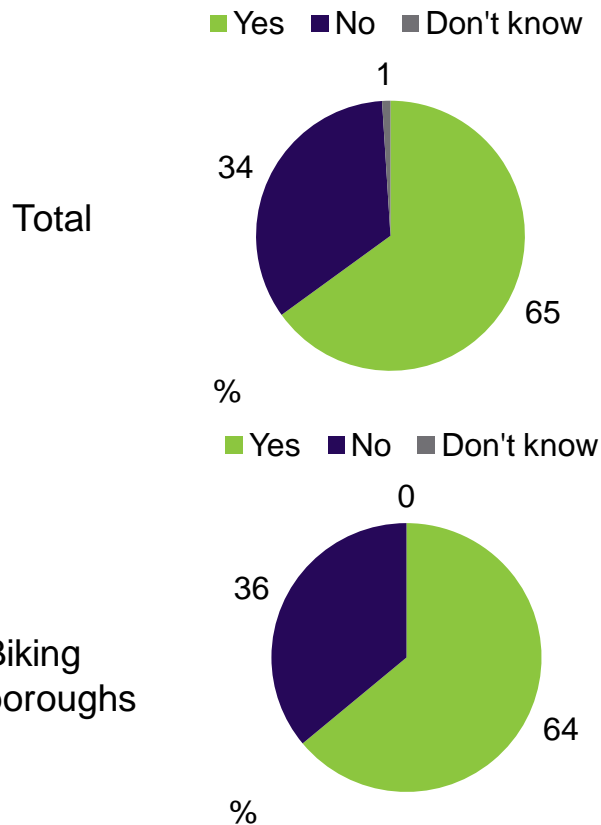
Base: all (Total, 1,373; biking boroughs, 840)



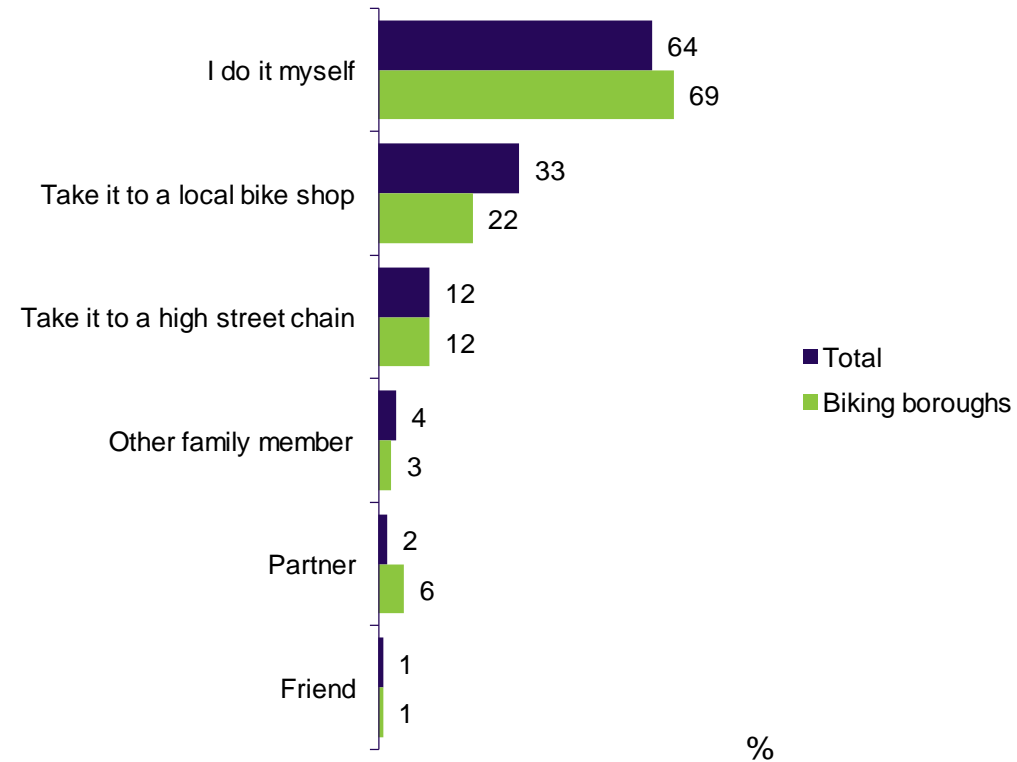
Bike maintenance

Bike maintenance

Do you maintain your bicycle?



How do you maintain the bicycle?



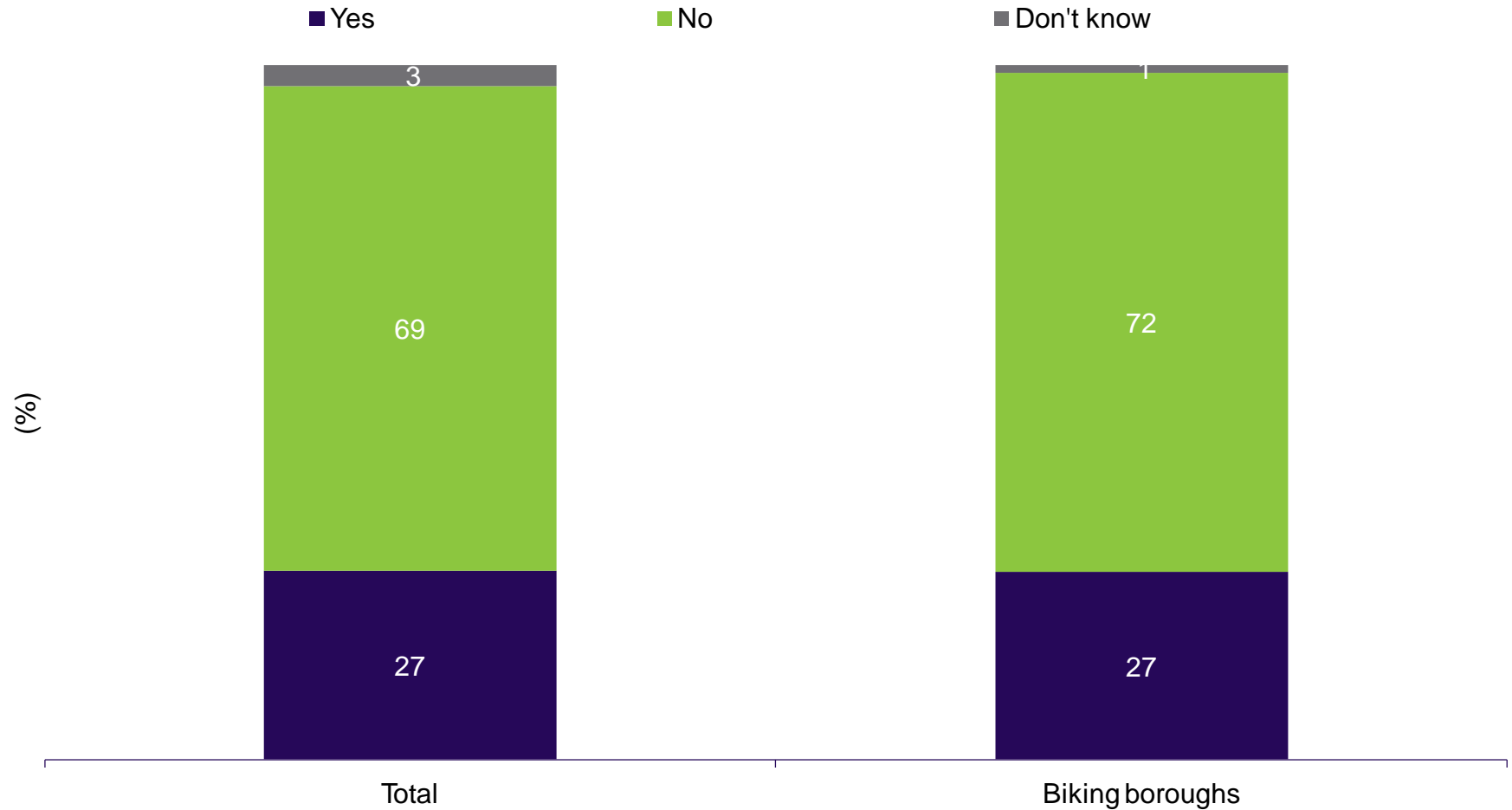
QMAINT1/MAINT2. Do you maintain the bicycle that you have access to? / How do you maintain the bicycle you have access to?

Base: all cycling at least monthly, or less but with household access to a bike (Total, 862; biking boroughs, 424) / all maintaining a bike (Total, 662; biking boroughs, 283)



Cycle marking

Cycle marking / registration with police

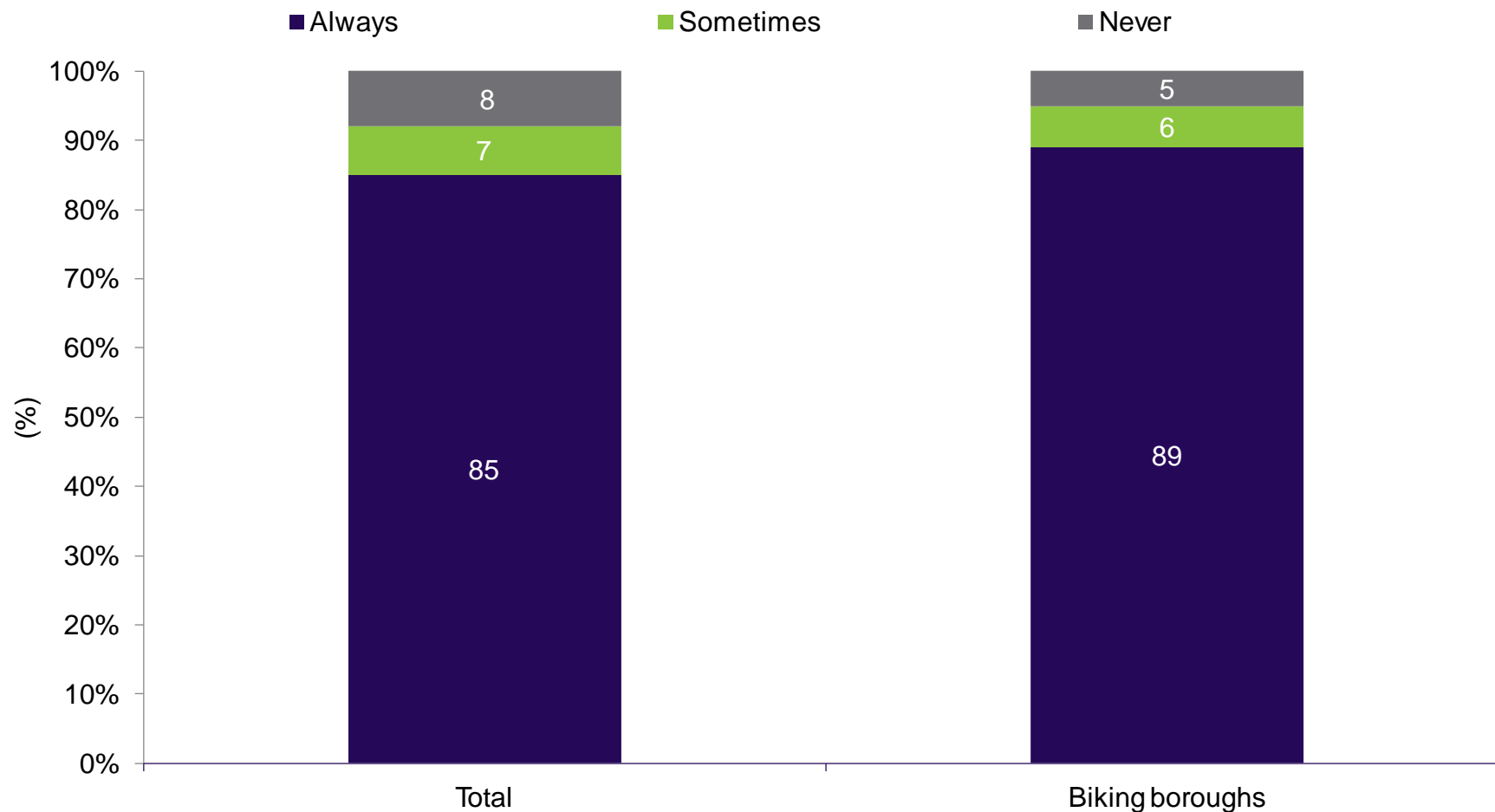


QMARK. Is the bicycle you have access to marked / registered with the police?
Base: all cyclists who cycle at least once a month (Total, 524; biking boroughs, 86)



Cycle security

Locking bicycle when out and about



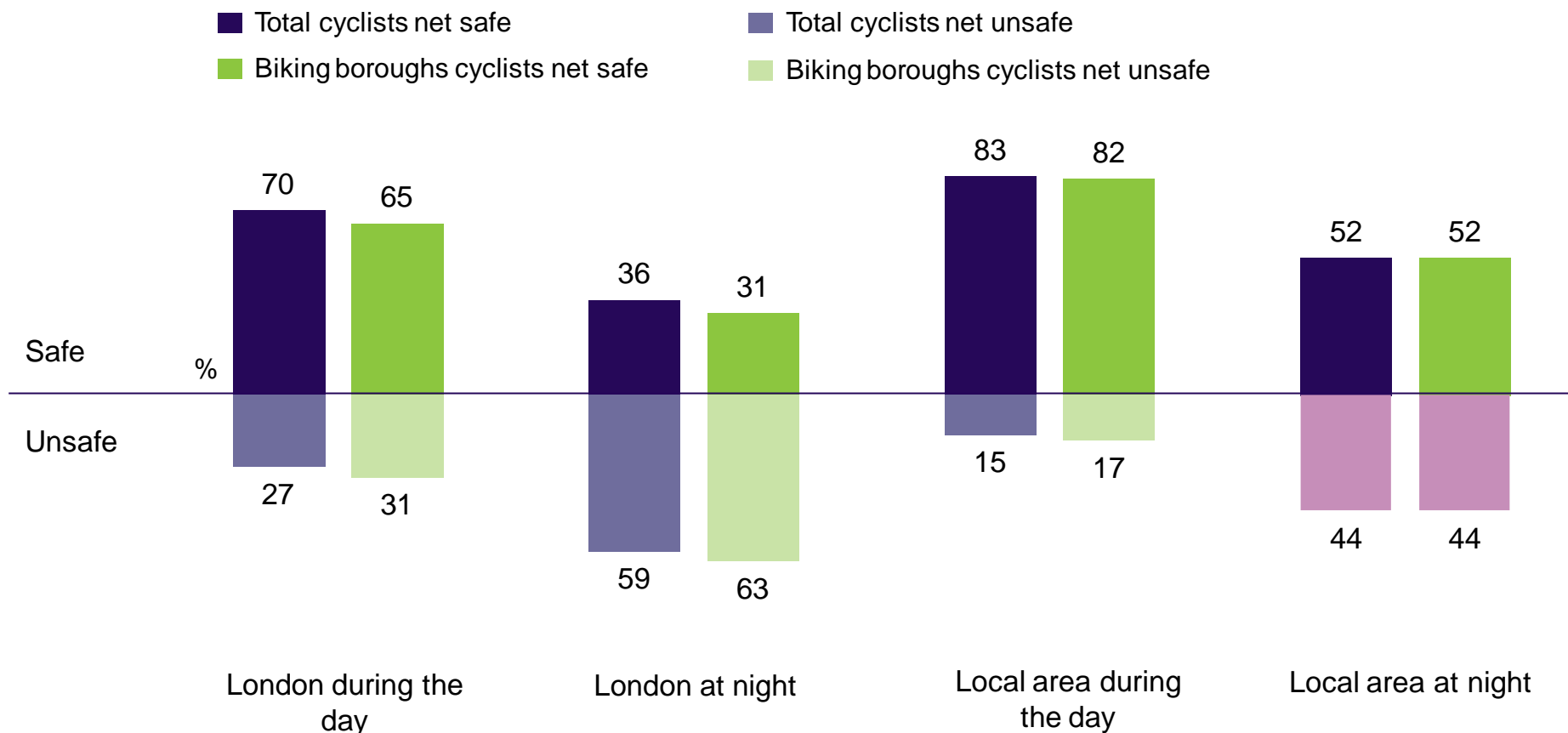
QLOCK1. When you're out and about on the bicycle you have access to how often do you secure it by locking it up?

Base: All cyclists who cycle at least once a month (Total, 524; biking boroughs, 86)



Perceptions of cycling safety

Safety of cycling in London and local area

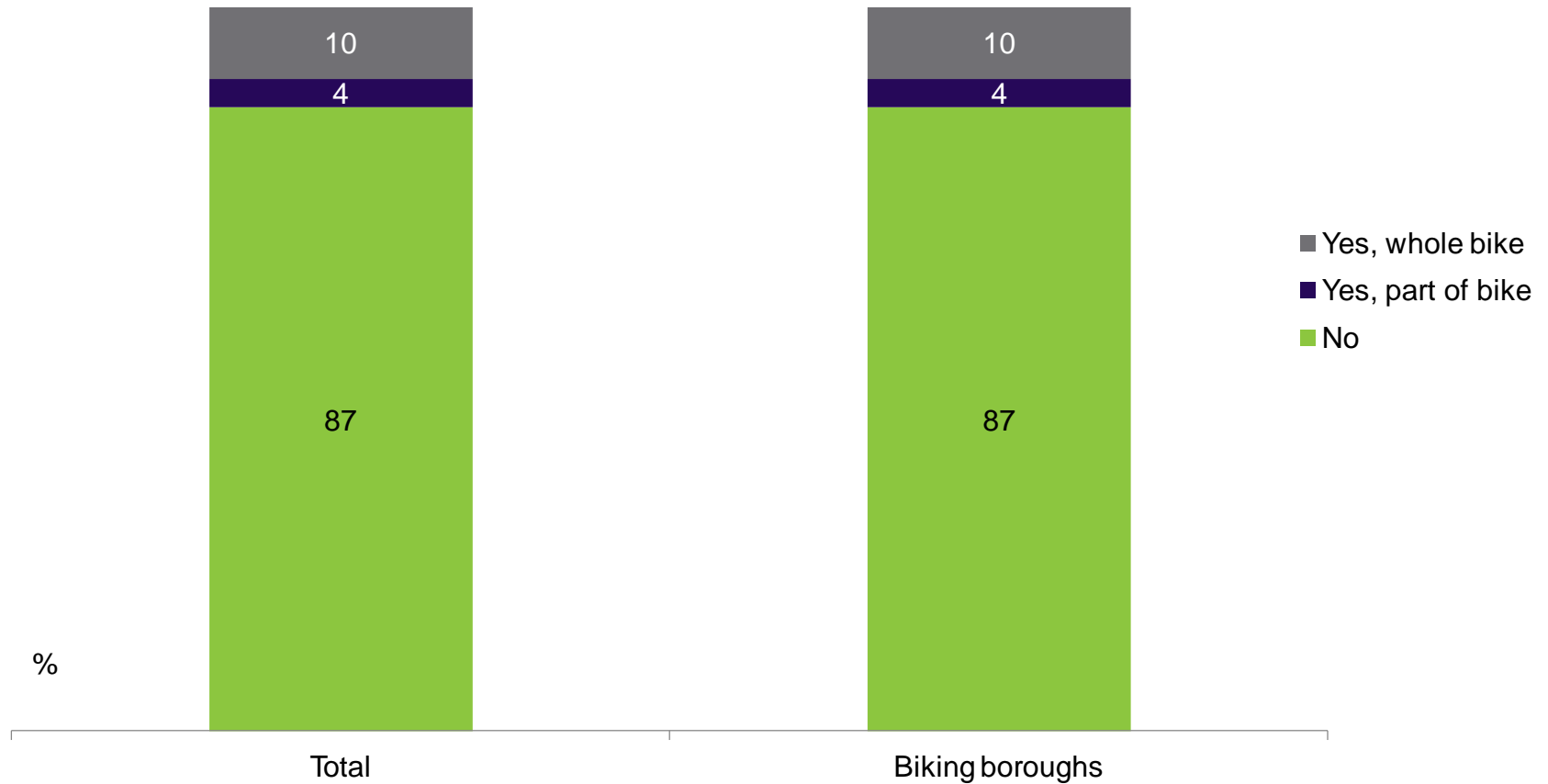


K1 – K4. Thinking about cycling in {London/local area} {during the day/at night}, how safe from crime or antisocial behaviour do you feel?
Base: All (Total, 1,373; biking boroughs, 840)



Cycle theft

Reported incidence of cycle theft



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

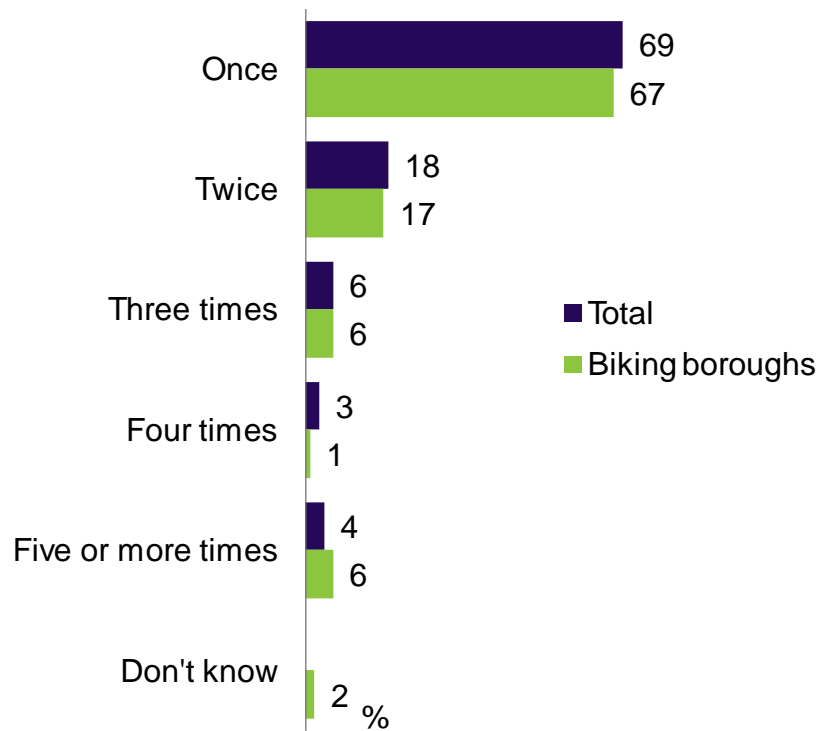
Base: All (Total, 1,373; biking boroughs, 840)



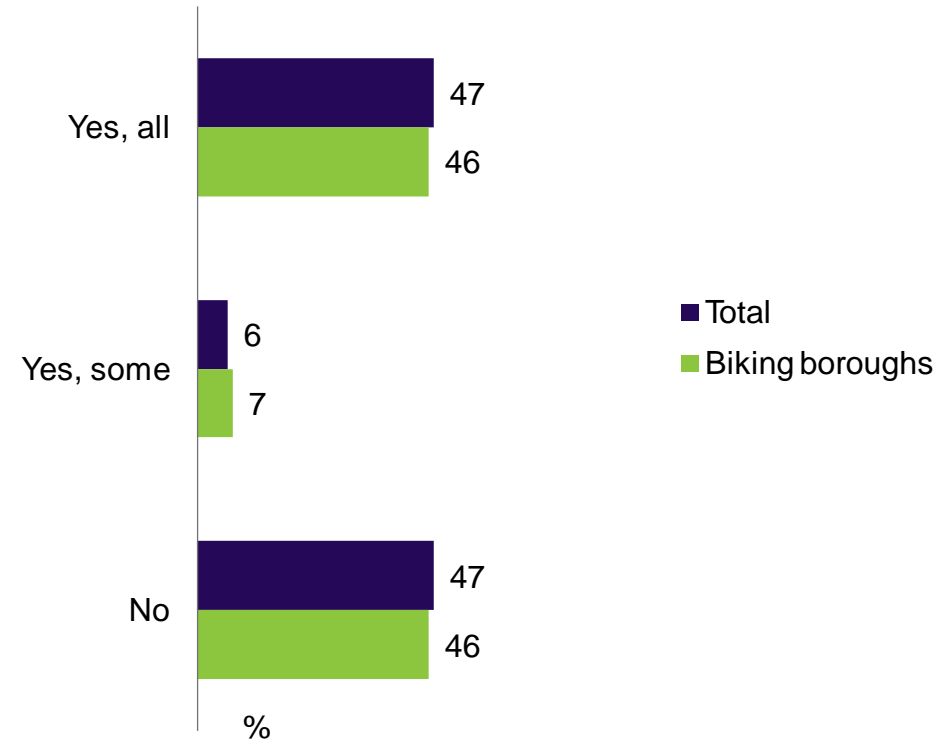
Reporting cycle theft

Number of cycle thefts experienced, and whether reported to police

Number of times had your bike (or part of bike) stolen



Whether reported to the police



L6: How many times has this happened to you (in the last couple of years)?

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

Base: all who have had (part of) bike stolen (Total, 223; biking boroughs, 93)



Reporting cycle theft

Reasons for not reporting cycle theft to police

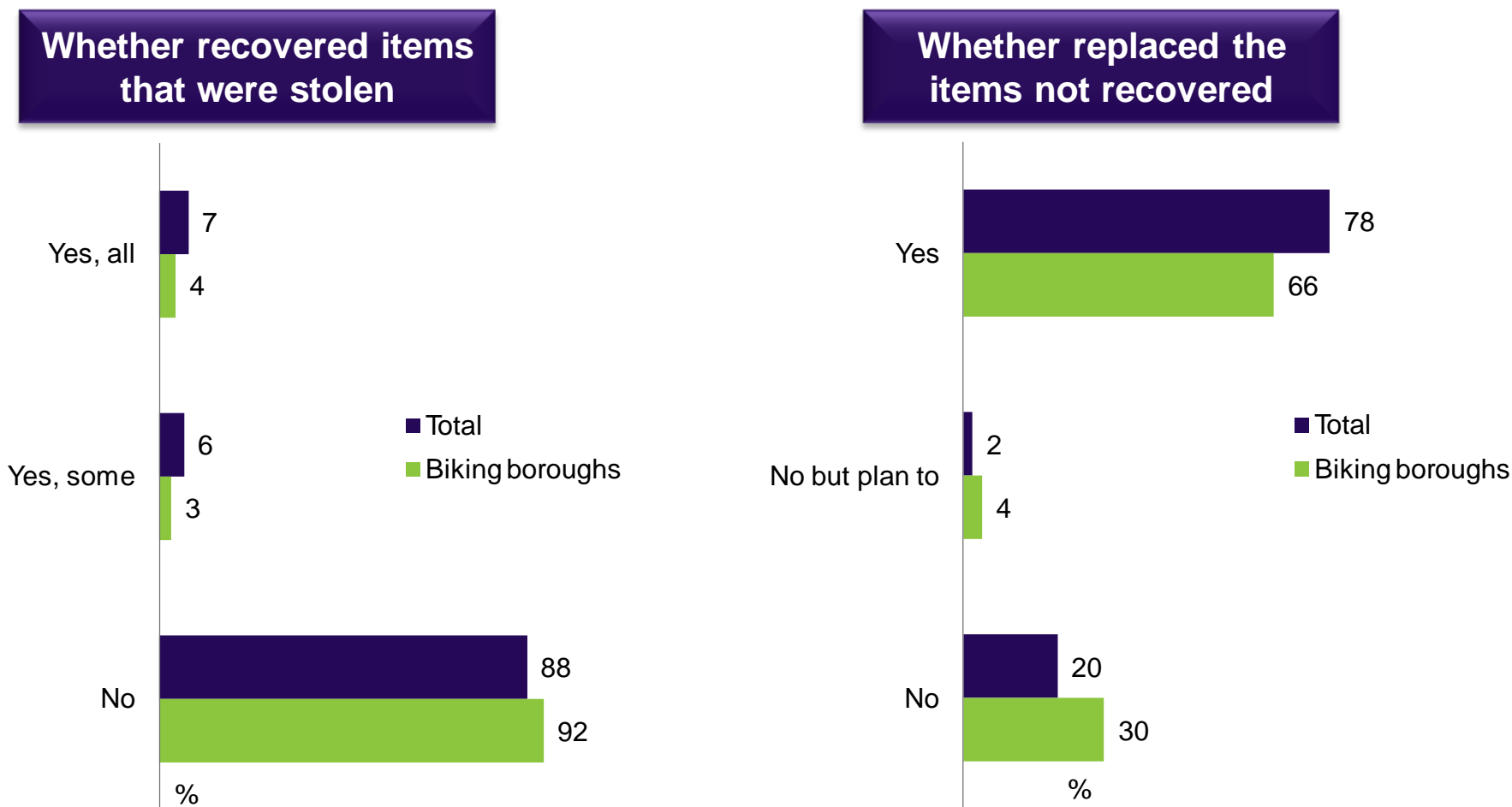
	Total (%)	Biking boroughs (%)
Waste of time / no point	28	30
Nothing would be done	22	16
Bike would not get returned / be found / not insured	10	9
Bike was not worth much / in poor condition	8	11
Hassle / could not be bothered	7	2
It was not convenient at the time / busy / going somewhere	6	-
Bike was returned / found	5	2
Only small part of bike / seat/wheel	5	8
I did not care / not important	4	7
It was my fault / bike was not secure	4	4
Not insured / only report if insured	2	2
Did not consider / think about calling the police	2	2

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

Base: all who have had (part of) bike stolen but did not report it to police (Total, 111; biking boroughs, 47)

→ Recovery of stolen items

Whether stolen items were recovered / replaced



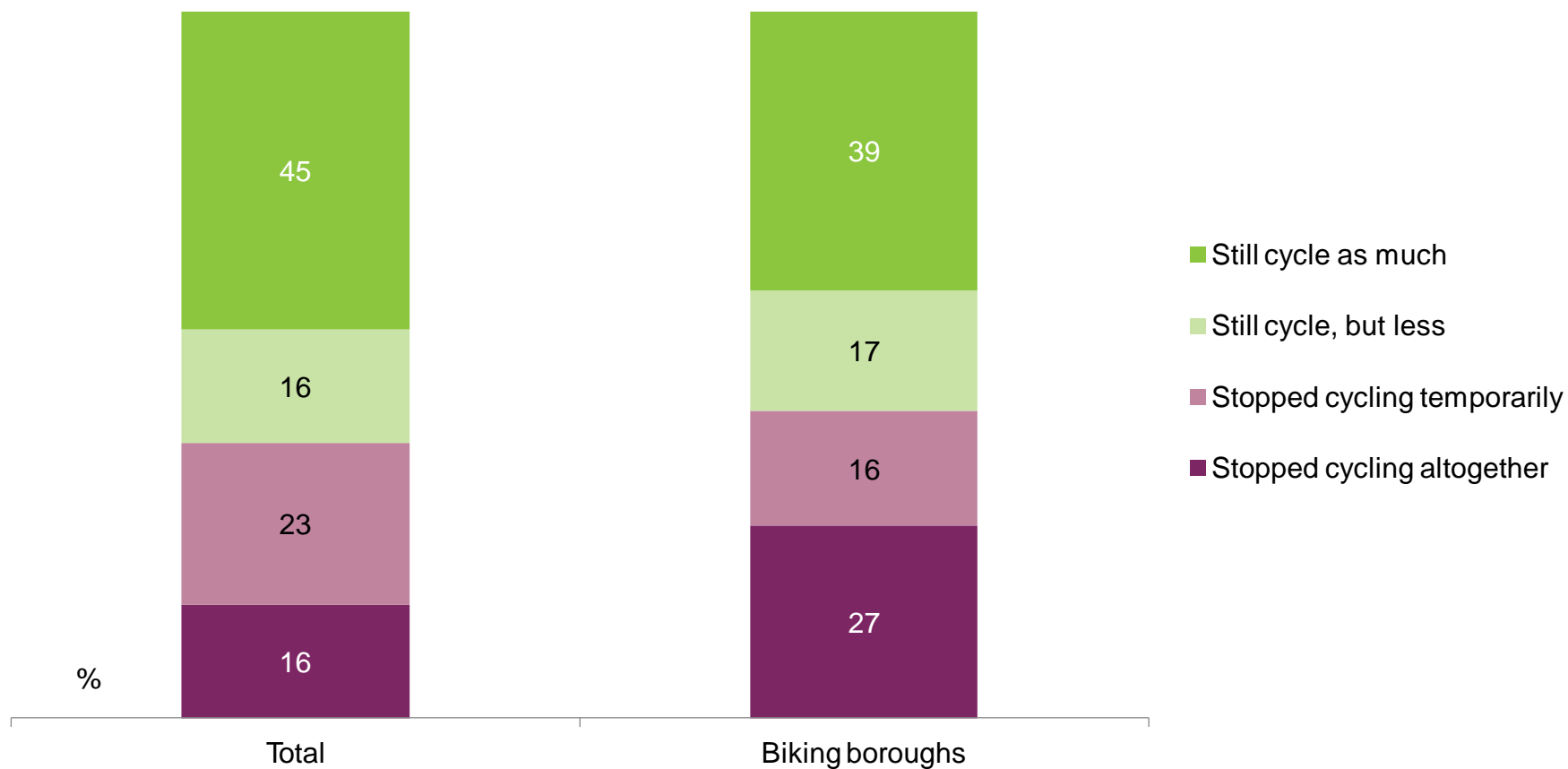
L10: Did you recover the items that were stolen? Base: Those who have had (part of) bike stolen (Total, 223; biking boroughs, 93)

L11: Did you replace the items that you did not recover? Base: Those who have had (part of) bike stolen and haven't recovered (Total, 212; biking boroughs, 89)



Impact of cycle theft

Impact of cycle theft on level of cycling



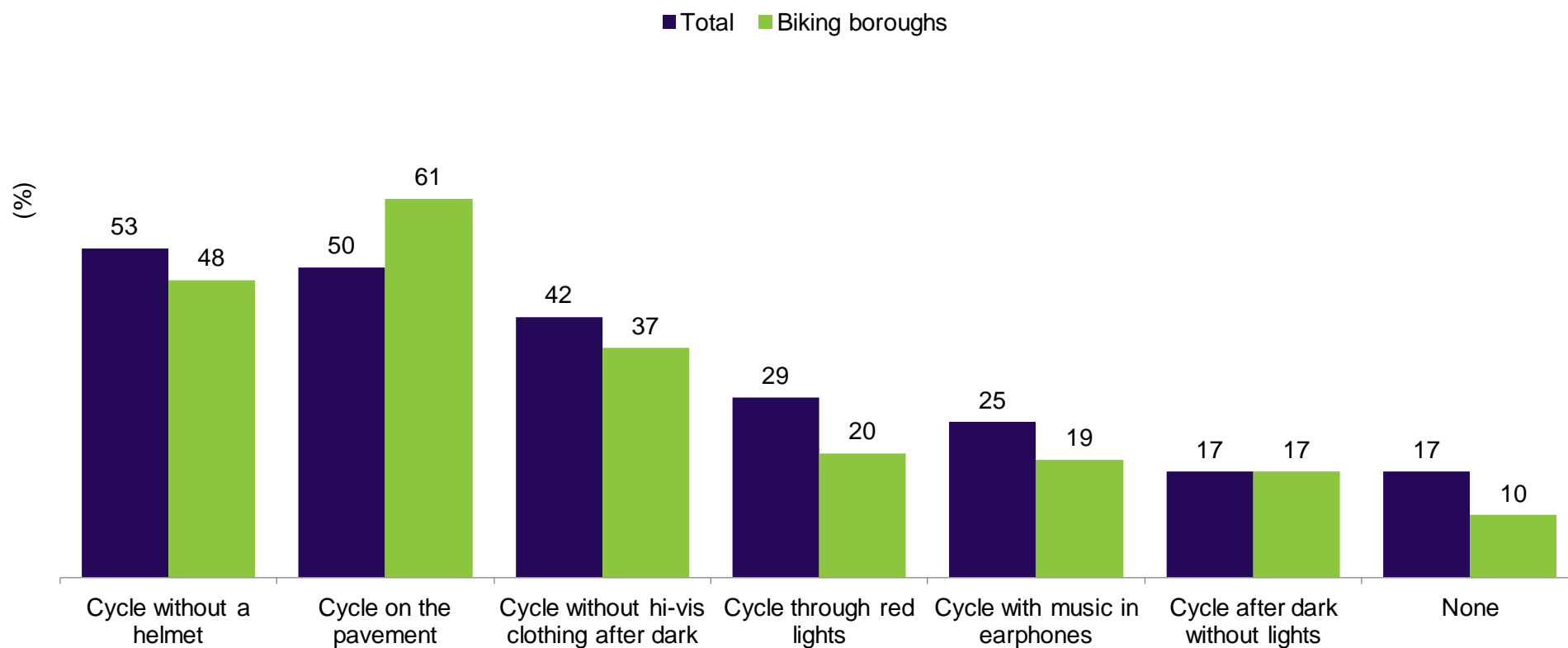
QL 12: What impact did being a victim of theft have on your level of cycling?

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



Cycling behaviours

Prevalence of 'cycling behaviours'



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

Base: all cyclists (Total, 532; biking boroughs, 115)