

2CV

Cycling potential in London's diverse communities

A report produced by 2CV
October 2021



Methodology

BACKGROUND

- As part of its Active Travel strategy, supporting London's growth as well as the health and quality of life of Londoners, TfL wants to understand how more people from diverse backgrounds can be encouraged and enabled to cycle.
- There is a particular need to understand the barriers to cycling among protected groups including Black, Asian and ethnic minority people, low income groups and disabled people.

OBJECTIVES

- To broaden the understanding of barriers affecting Black, Asian and ethnic minority people, low income groups and disabled people cycling in London.
- To explore interest in schemes that TfL could offer to address these barriers.

SAMPLE

London representative sample	#
Total sample	3503
Cyclists	956

Sample representative of London on gender, age, and SEG.

METHOD

- 6-minute self-complete online survey utilising panel partners to recruit sample.
- Fieldwork took place from 4th March – 16th March 2021.

Over 20% of non-cyclists are actively considering taking up cycling

Through addressing the barriers of non-cyclists, particularly among protected groups, TfL has an opportunity to increase the number of cyclists in London

- **27% of Londoners already cycle and another 16% are actively considering taking up cycling (22% of non-cyclists)**
 - This amounts to a near market for cycling of over 40% of Londoners
 - The most active considerers are those aged 16-34, and those from Black and Asian ethnic backgrounds.
 - Most people in London have the ability to ride and store a bicycle, but bicycle ownership is a bigger challenge to be addressed.
 - Lower income groups are those most likely to be prevented by functional factors, and affordability is a large issue.
- **Road and personal safety concerns prevent both non-cyclists from cycling, and current cyclists from cycling more**
 - It will be particularly important to address personal safety and concerns about unwanted attention among women and Black, Asian and ethnic minority people.
 - Practicality is a secondary, but critical barrier for key growth audiences, particularly women.
- **Cycle routes need to be designed with the cyclist's sense of safety in mind**
 - Improving cycling routes to offer protected cycle lanes and quieter streets would encourage more cycling in general, including among less represented groups.
 - There is also good interest in educational schemes, particularly among the 16-34s and Black, Asian and ethnic minority people who are most engaged in trying cycling – training in cycle maintenance and skills holds most potential.

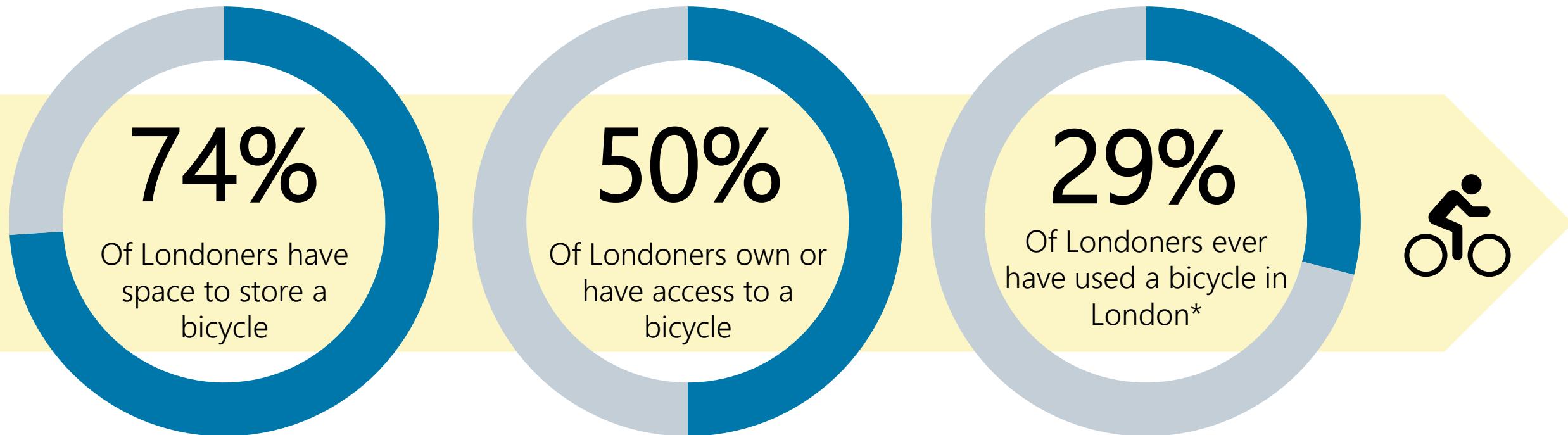
Understanding the London Cycling Landscape



More than one in four Londoners are cyclists

Half of Londoners do not have access to a cycle and a quarter do not have space to store one

Bicycle ownership and use | Total sample (All Londoners)



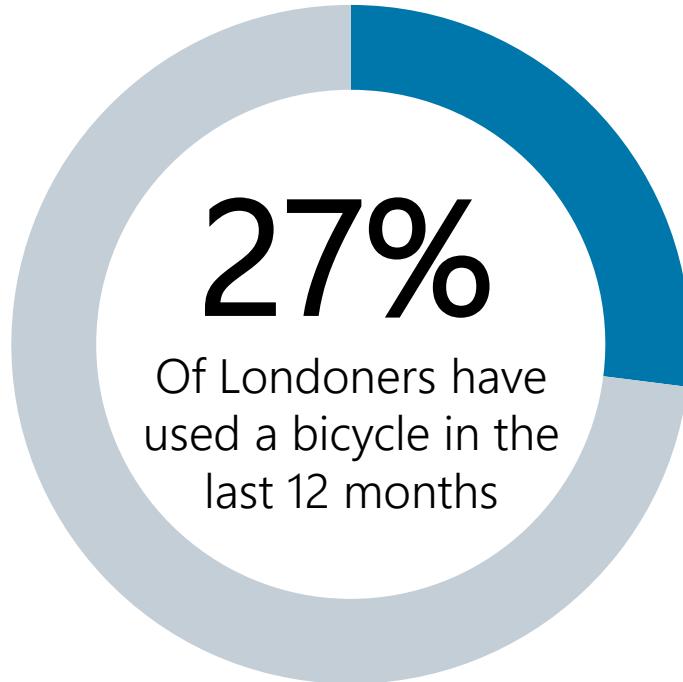
*27% have cycled in London in the last 12 months

Q | Q3. Do you have space to store a bike at home. Q2. Do you own or have access to a bike at the moment? SQ2. How often do you use the following modes of transport to get around London - "Cycling, including e-bike/cycle hire". SQ1. Which of these modes of transport do you ever use in London?
Base | All respondents (3503)

Black, Asian and ethnic minority people are not significantly less likely to have cycled in the last 12 months

Whilst cyclists' ethnicity is largely white, this is not dissimilar from London representation. Women, older people, disabled people and those on low incomes are less likely to cycle

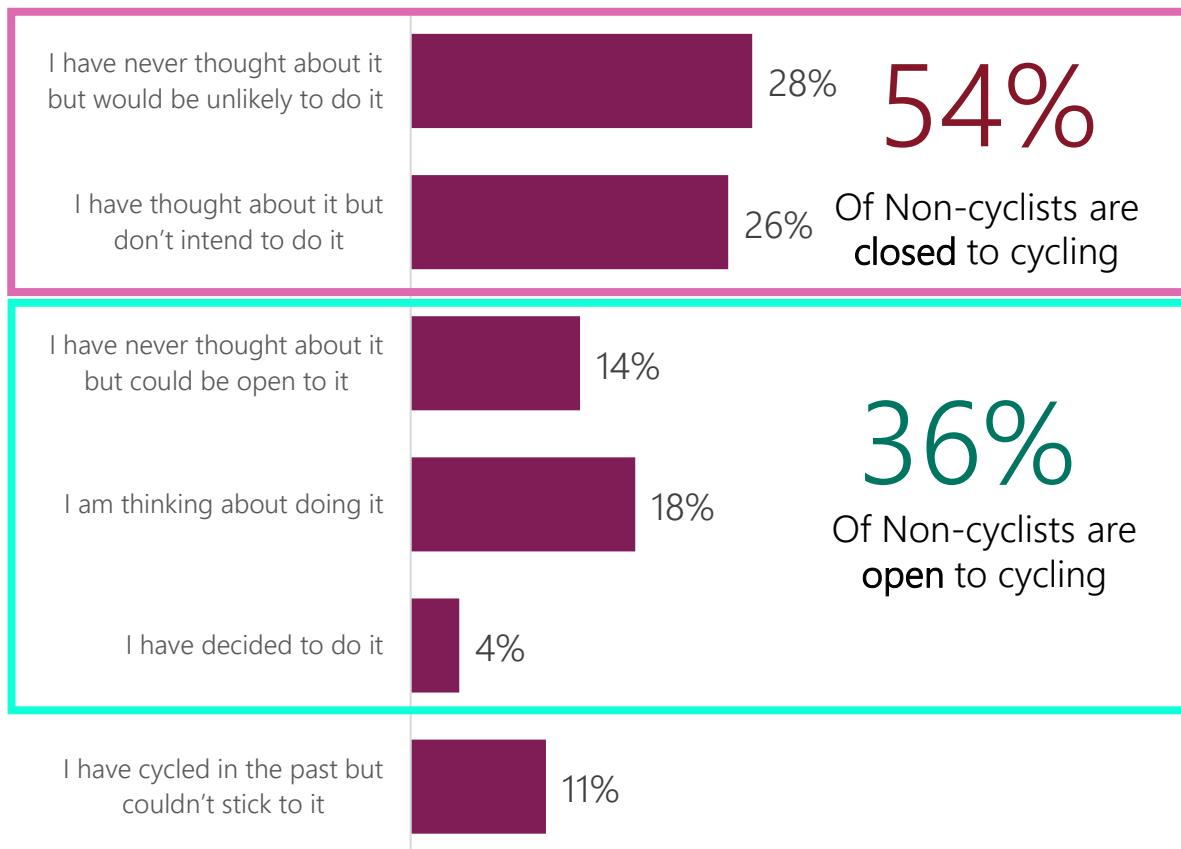
% using a Bike in the L12M



Among all non-cyclists, one in five are actively open to trying it

However, there is a sizable group who are currently closed to the idea – there is a limit to immediate recruitment potential

Openness to cycling | Non-cyclists (not cycled in London)



22%
Of Non-cyclists are
actively open to cycling
Defined as thinking about doing
it or have decided to do it

Q | Q4. Which one statement best applies to you when thinking about starting to cycle in London?
Base | All non-cyclists not cycled in London (2468)

Men, 16-34s and Black, Asian and ethnic minority people are the most open to cycling

Conversely, women, those aged 55+ and those of white ethnicity are least open to cycling

Openness to cycling | Non-cyclists (not cycled in London)



Where these groups intersect, we find those non-cyclists most open to cycling

Q | Q4. Which one statement best applies to you when thinking about starting to cycle in London

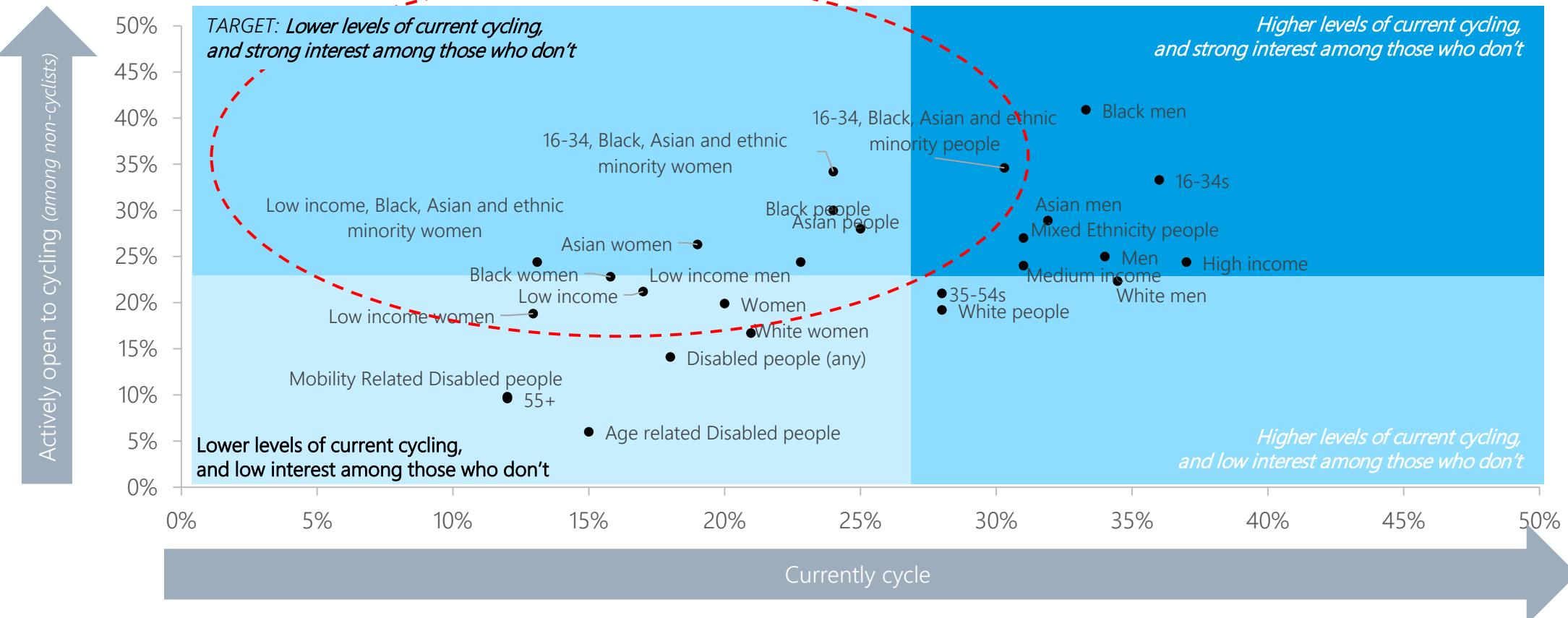
Base | All non-cyclists not cycled in London (2468); Men (1048), Women (1398), 16-34 (838), 35-54 (892), 55+ (738); White people (1660), Black people (235), Asian people (377), Mixed/Multiple Ethnicity people (115); Disabled people (any) (629), No Disability (1680); Low income (Under 20K) (548); Medium income (20K-70K) (1232); High income (70K+) (362)

Statistically significant vs Total at 95% confidence



Young Black, Asian, and mixed ethnicity women in particular are strong targets to encourage into cycling

Openness to cycling and current cycling



Q | SQ2. How often do you use the following modes of transport to get around London - "Cycling, including e-bike/cycle hire"; Q4. Which one statement best applies to you when thinking about starting to cycle in London?

Base | All respondents (3503) for SQ2 and Non Cyclists (2477) for Q4 All Subgroups > 80. For specific base sizes please see notes.

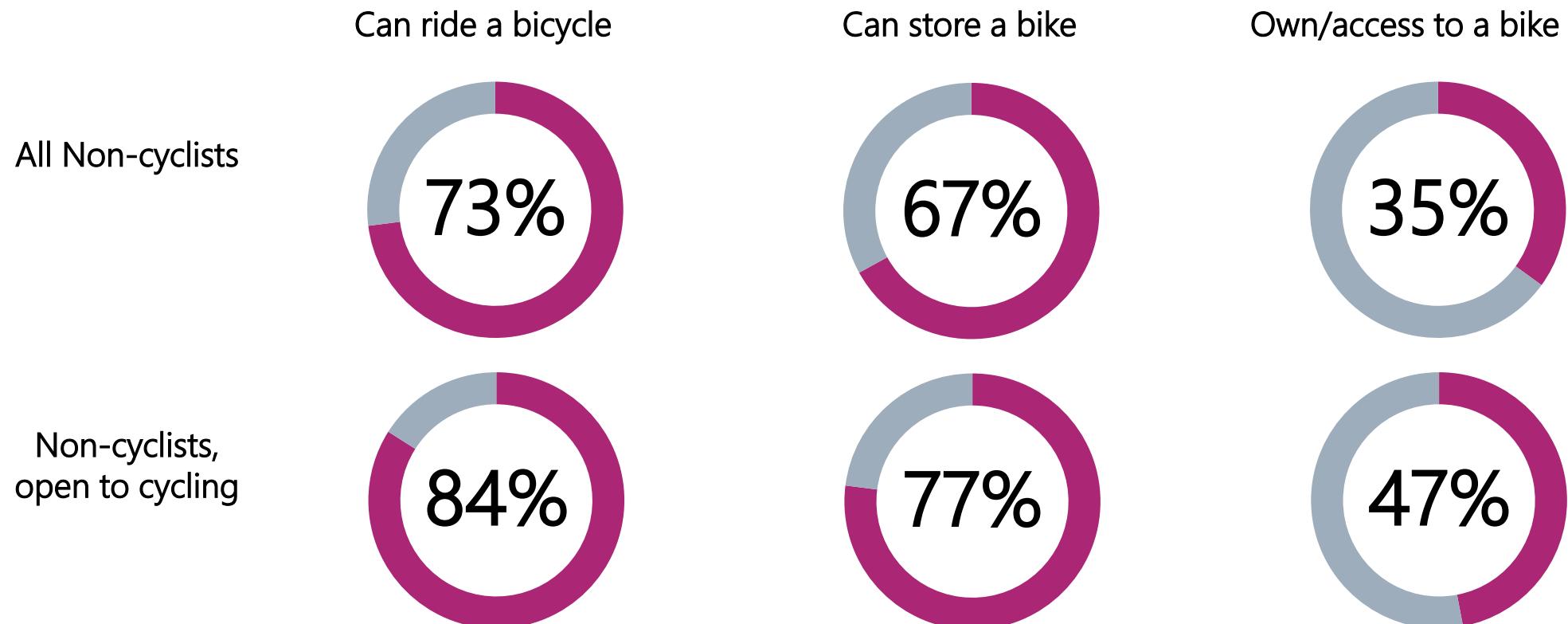
Barriers to Cycling



Access to a bike is a key barrier: most non-cyclists can ride a bicycle and 2 in 3 have the ability to store a bike

There is a relationship between openness to cycling and functional barriers: those open to cycling face fewer barriers

Bicycle ownership and use | Total Non-cyclists (not cycled in the last 12 months)

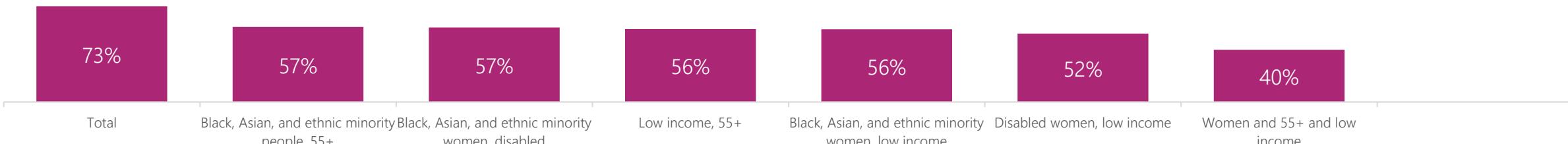


Q | Q1. Can you ride a bicycle (or other cycle)? Q3. Do you have space to store a bike at home? Q2. Do you own or have access to a bike at the moment?

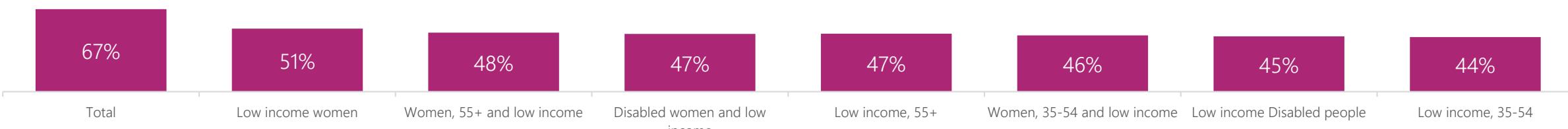
Base | All non-cyclists (2534), All non-cyclists open to cycling (883)

Challenges are most prominent among older women with low income and/or disabilities

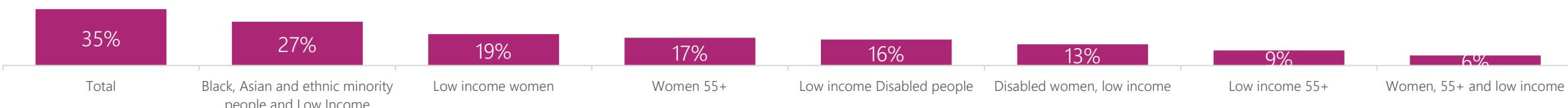
Can ride a bike | Across subgroups that under-index (non-cyclists)



Bicycle storage | Across subgroups that under-index (non-cyclists)



Bicycle access/ownership | Across subgroups that under-index (non-cyclists)



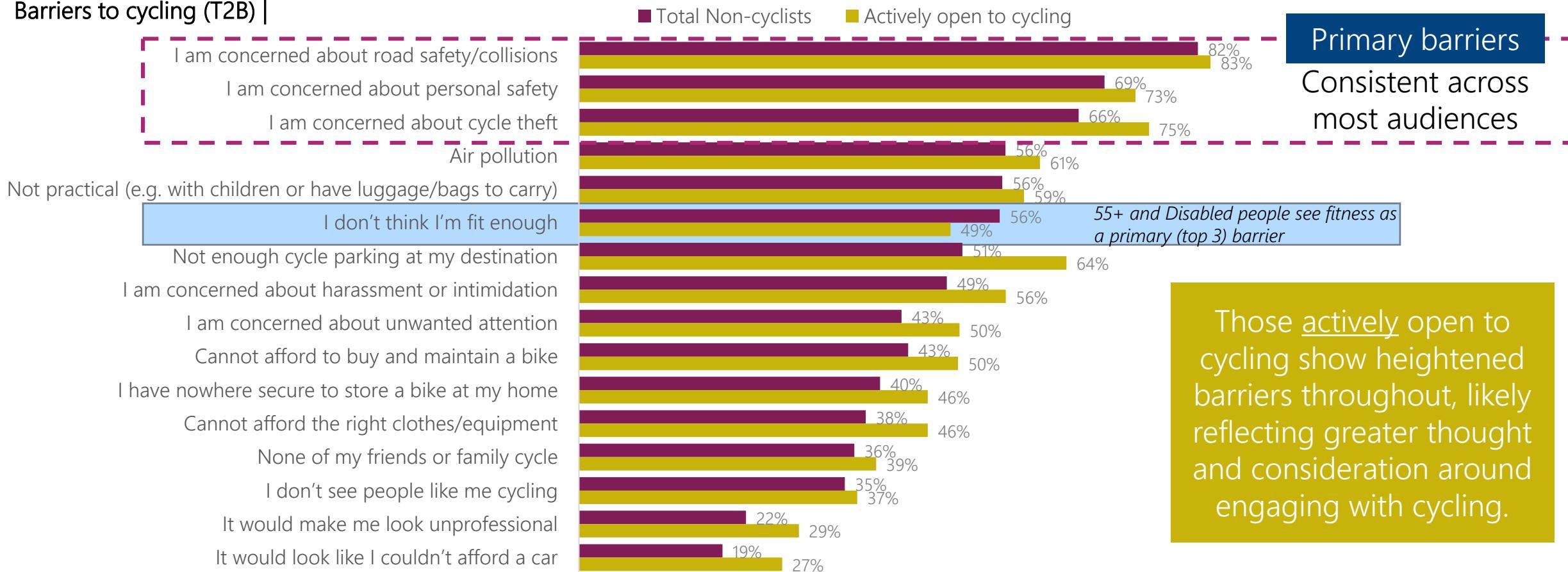
Q | Q1. Can you ride a bicycle (or other cycle)? Q3. Do you have space to store a bike at home? Q2. Do you own or have access to a bike at the moment?

Base | All non-cyclists (2534), Black, Asian and ethnic minority people, 55+ (396), Black, Asian and ethnic minority women, disabled (94), Low income, 55+ (191), Black, Asian and ethnic minority people low income (173), Disabled women, low income (136), Women and 55+ and low income (110), Low income women (324), Women, 55+, low income (110), Women, 35-54, low income (110), Disabled low income (215), Low income, 35-54 (170), Women 55+ (388)

Primary barriers centre around safety and theft and are largely consistent across non-cyclist audiences

For non cyclists, social identification barriers are secondary

Barriers to cycling (T2B) |



Q | Q6. Irrespective of whether you currently cycle or not, to what extent do each of the below put you off cycling more/taking up cycling?

Base | All non-cyclists (2534), actively open to cycling (545)

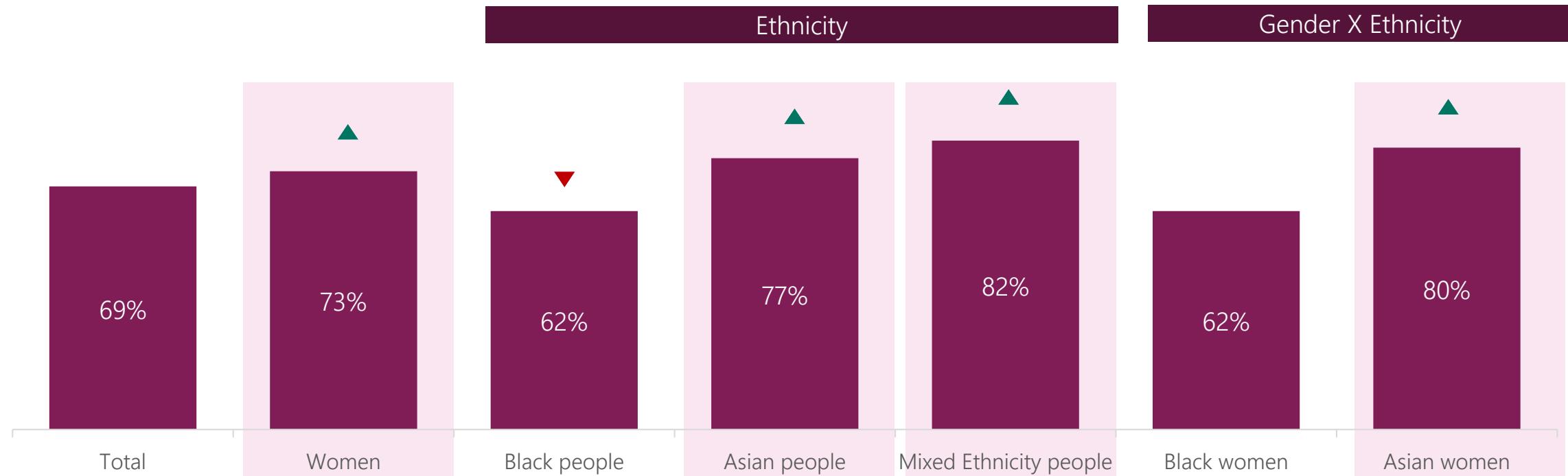
Primary barriers
Consistent across
most audiences

Those actively open to cycling show heightened barriers throughout, likely reflecting greater thought and consideration around engaging with cycling.

Personal safety is a bigger concern for women, Asian and mixed ethnicity people

And this is further exaggerated where these groups intersect; i.e. for Black women, Asian women

I am concerned about personal safety (T2B) | Non-cyclists (not cycled in the last 12 months)



Important to address among women as well as Black, Asian and ethnic minority people who are among most open to cycling

Q | Q6. Irrespective of whether you currently cycle or not, to what extent do each of the below put you off cycling more/taking up cycling?

Base | All non-cyclists (2534); Women (1431); Black people (240); Asian people (384); Mixed ethnicity people (116); Black women (150); Asian women (220)

Statistically significant vs Total at 95% confidence

While sharing primary barriers to cycling, minority audiences are more likely to face secondary emotional and functional barriers

Secondary barriers faced by minority audiences in particular

Cost

- Can't afford to buy and maintain a bike
- Can't afford right clothes/equipment

Practical

- Not practical for me
- Not enough cycle parking at my destination
- I have nowhere to secure a bike at my home

Social

- Concerned about harassment/intimidation
- Concerned about unwanted attention

Personal / Identity

- Don't think I'm fit enough
- None of my friends/family cycle
- I don't like people seeing me cycle

Status

- Looking unprofessional
- Look like I can't afford a car

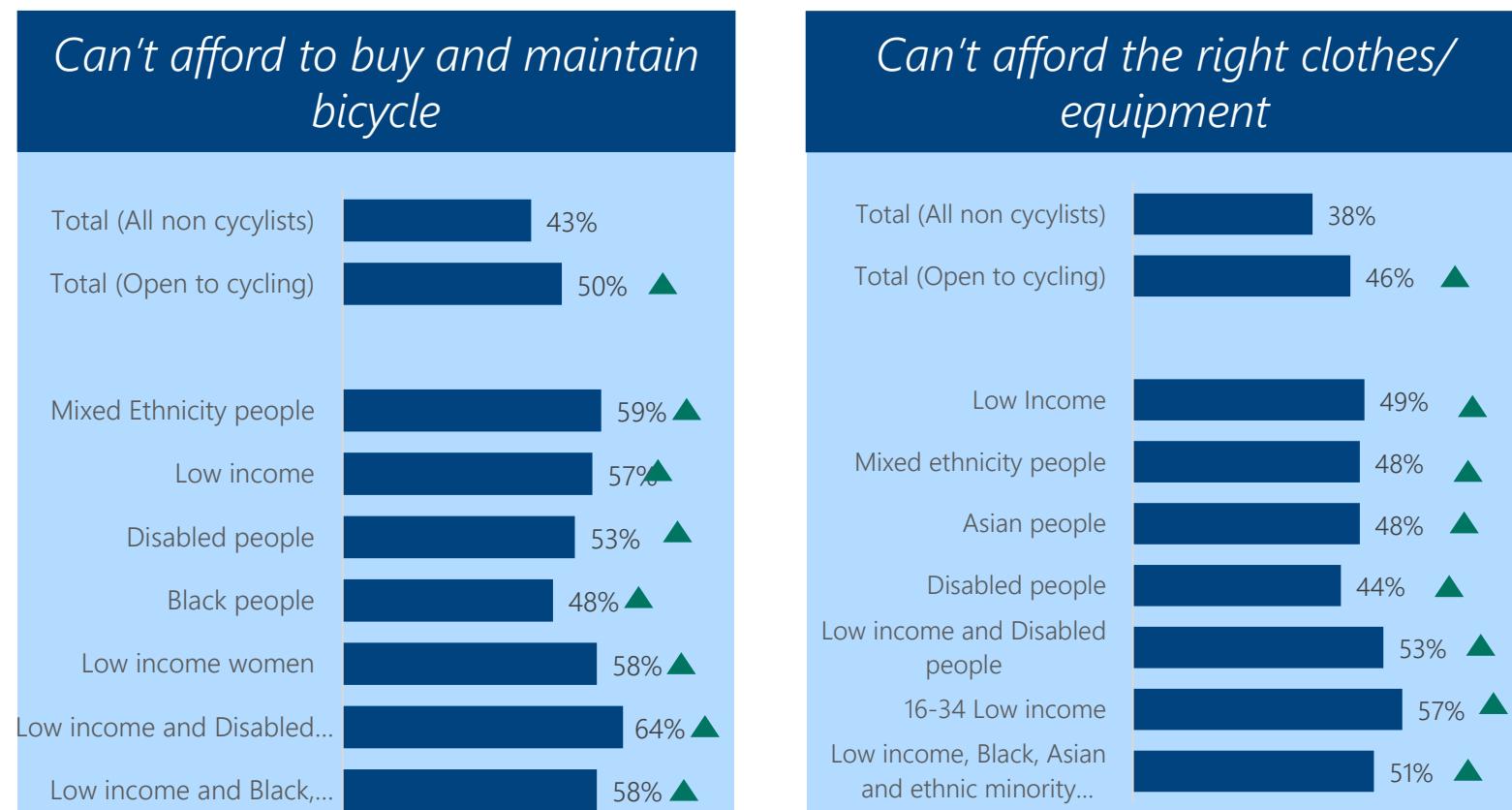
We will explore each and the audiences they concern

The cost of a bike itself, as well as the clothes and equipment can be a barrier for other minority audiences

The costs of taking up cycling extends beyond the bike itself

Barriers to cycling (T2B) Key Skews over-index | Non-cyclists (not cycled in the last 12 months)

Note sub-groups are among the total 'non cyclist' audience



Q | Q6. Irrespective of whether you currently cycle or not, to what extent do each of the below put you off cycling more/taking up cycling?

Base | Total non cyclists (2534), Total Open to Cycling (883) Non-cyclists subgroups Asian people (384); Black people (240); Mixed Ethnicity people (116); Low income (559); Disabled people (644); Low income women (329); Low income disabled people (218); Low income Black, Asian, and ethnic minority people (176); Low income 16-34s (192); Low income, Black, Asian and ethnic minority women (109)

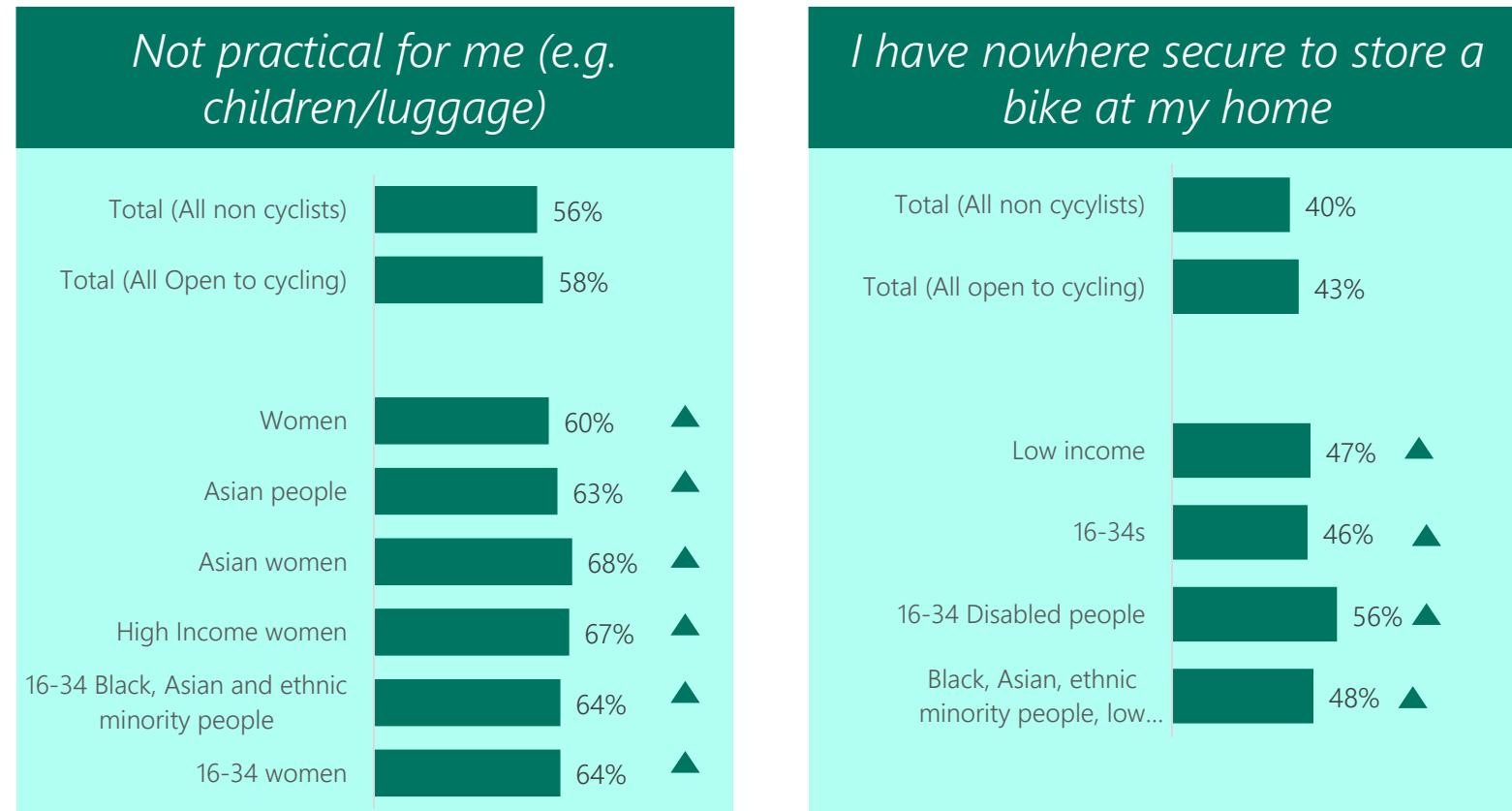
Statistically significant vs
Total at 95% confidence

Lack of secure storage can be a particular issue for low income people

Issues relating to practicality predominately impact women

Barriers to cycling (T2B) Key Skews over-index | Non-cyclists (not cycled in the last 12 months)

Note sub-groups are among the total 'non cyclist' audience



Q | Q6. Irrespective of whether you currently cycle or not, to what extent do each of the below put you off cycling more/taking up cycling?

Base | Total non cyclists (2534), Total Open to Cycling (883)) Non-cyclists subgroups, Women (1431) Asian people (384); Asian women (220); High income women (171); 16-34 Black Asian and Ethnic minority people (405) 16-34 women (520) 16-34 (869) 16-34 Disabled people (179) Black, Asian and ethnic minority people, low income (176)

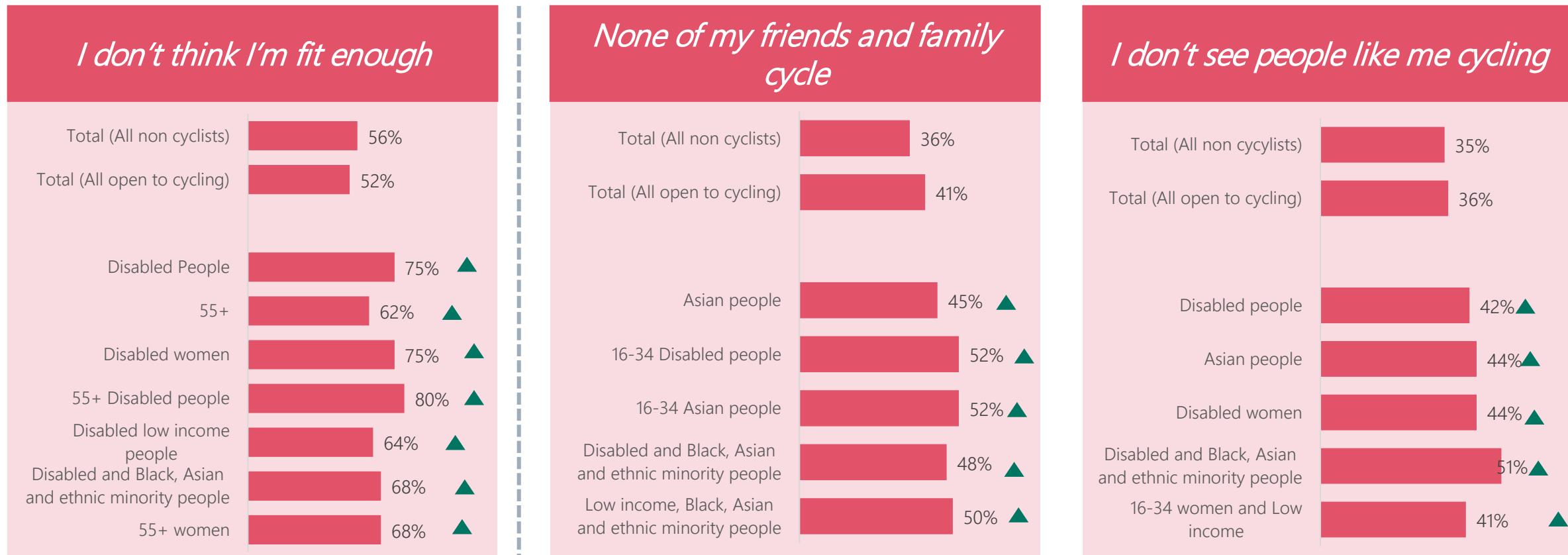


Statistically significant vs
Total at 95% confidence

Disabled people face concerns around fitness as well as a lack of relevant role models

Barriers to cycling (T2B) Key Skews over-index | Non-cyclists (not cycled in the last 12 months)

Note sub-groups are among the total 'non cyclist' audience



Q | Q6. Irrespective of whether you currently cycle or not, to what extent do each of the below put you off cycling more/taking up cycling?

Base | Total non cyclists (2534), Total Open to Cycling (883) Disabled people (644); 55+ (748); 55+ Disabled people (269); Disabled women (382) Disabled and low income (218) Disabled and Black, Asian, and ethnic minority people (137); 55+ Women (392) Asian People (384); 16-34 Disabled people (178) 16-34 Asian people (190) Black, Asian, and ethnic minority people and Low income (176); 16-34 women and Low income (109);



Statistically significant vs
Total at 95% confidence

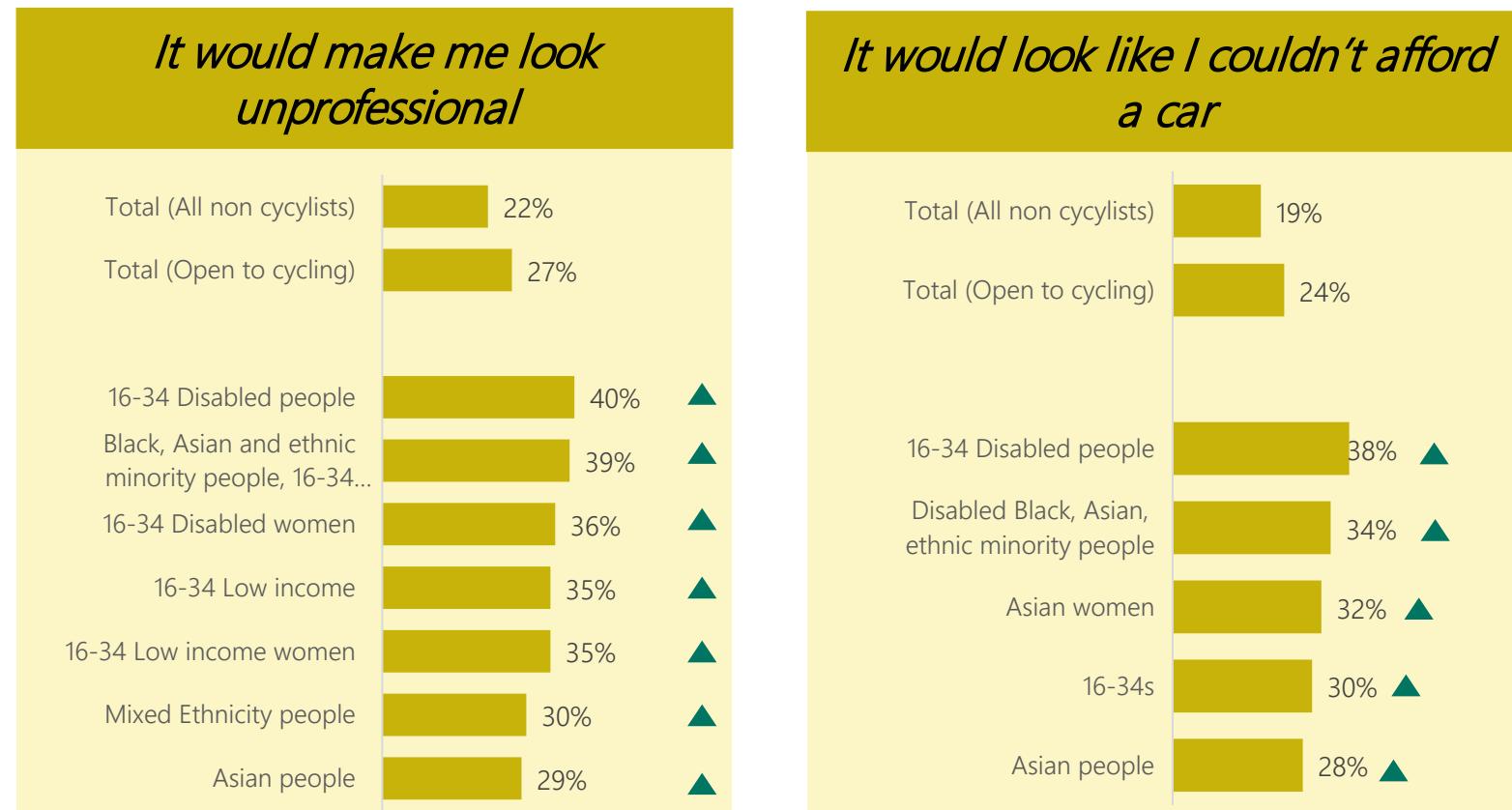


Intersecting audiences of younger, low income and disabled people, especially women, hold social barriers around status

Asian people, especially women are also more likely to report cycling barriers related to status. However, these are not primary barriers for any groups and ranked lowest among all barriers (see slide 13 of this report)

Barriers to cycling (T2B) Key Skews over-index | Non-cyclists (not cycled in the last 12 months)

Note sub-groups are among the total 'non cyclist' audience



Q | Q6. Irrespective of whether you currently cycle or not, to what extent do each of the below put you off cycling more/taking up cycling?

Base | Total non cyclists (2534); Total Open to cycling (883) Non-cyclists subgroups: Mixed Ethnicity (116) Asian people (384); 16-34s (869); Asian women (220), 16-34 Disabled people (178), 16-34 Low income (192), Disabled Black, Asian, and ethnic minority people (137) 16-34 Disabled women (112)
3-way subgroups all have a base ~100



Statistically significant vs
Total at 95% confidence

Four in ten are concerned about unwanted attention if they were to become a cyclist

This is a key concern for those audiences who were most open to cycling – 16-34s and Black, Asian and ethnic minority people

I am concerned about unwanted attention (T2B) | Total Non-cyclists (not cycled in the last 12 months)

Note sub-groups are among the total 'non cyclist' audience



Where these groups intersect, we find concern about unwanted attention to be higher e.g. 16-34 Asian people (57%)

Q | Q6. Irrespective of whether you currently cycle or not, to what extent do each of the below put you off cycling more/taking up cycling?

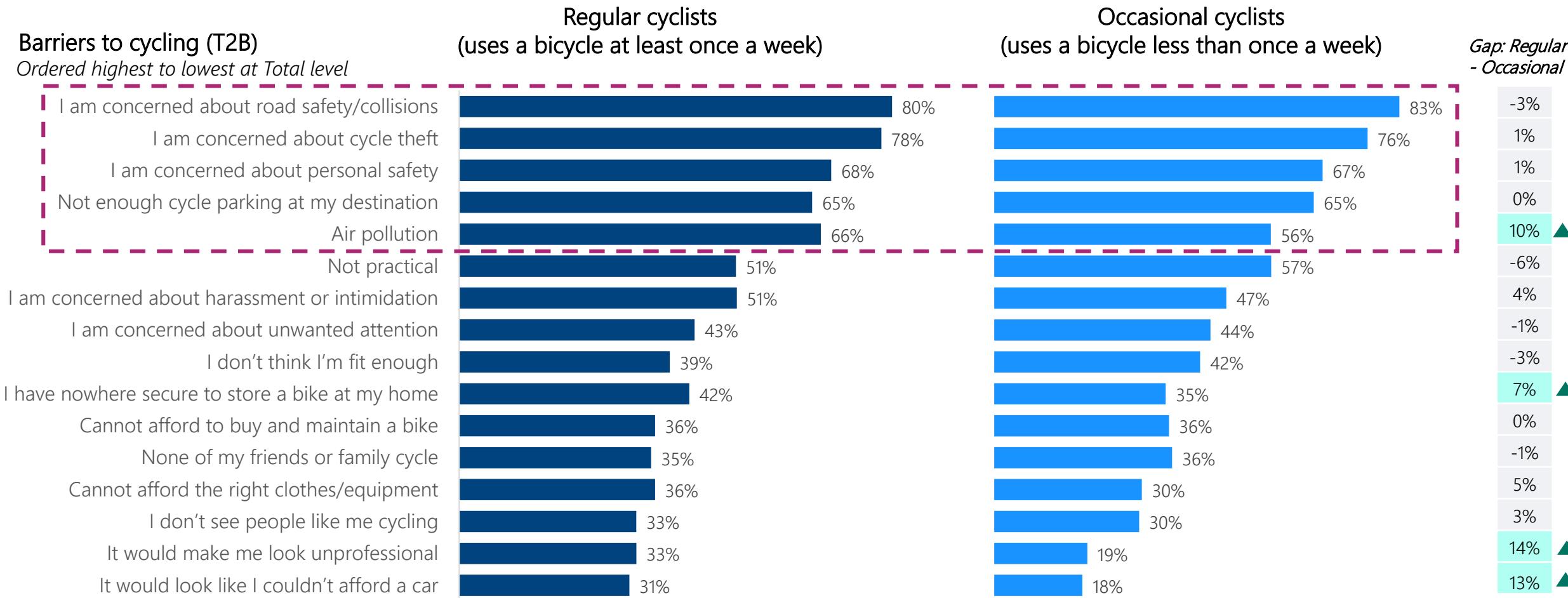
Base | All non-cyclists (2534); Women (1431) 16-34s (869); 16-34 women (520) Black people (240); Asian people (384); Mixed ethnicity people (116); Black women (150); Asian women (220); 16-34 Asian people (128); 16-34 Asian people (190)

▲ Statistically significant vs Total at 95% confidence



Barriers facing regular and occasional cyclists are similar, meaning the focus areas for TfL remain the same as for non-cyclists

Regular cyclists have greater concern around air quality and impact on their personal appearance and status



Q | Q6. Irrespective of whether you currently cycle or not, to what extent do each of the below put you off cycling more/taking up cycling?
Base | All cyclists (956), Regular cyclists (once a week or more often) (633), Occasional cyclists (once a fortnight or less often) (323)

Statistically significant
Regular vs. Occasional
95% confidence

In summary, promoting safety is the core lever to boost cycling, but nuance exists across audiences in the secondary barriers they face

Outside of safety, there are also practical challenges to address, particularly for lower income groups

Primary barriers (Emotional)	Safety				
	Bike theft				
Social	Cost	Practical	Personal	Status	
<ul style="list-style-type: none">• Women• 16-34s• Asian people• Mixed ethnicity people• Asian women• Black women.	<ul style="list-style-type: none">• Mixed ethnicity• Low income• Disabled people• Black people.	<ul style="list-style-type: none">• Women• 16-34s• Low income• Asian people• Mixed ethnicity people• Young disabled people.	<ul style="list-style-type: none">• >55's• Disabled people• Asian people• Some women.	<ul style="list-style-type: none">• 16-34s• Mixed ethnicity people• Asian people• Young Disabled people• Some low income groups.	

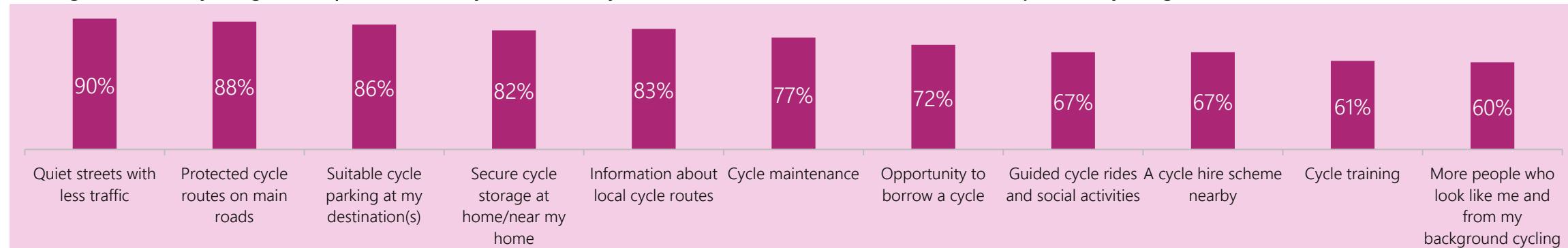
Encouraging People to Cycle



Quiet streets and protected cycle routes are the most important factors to encourage cycling – addressing safety concerns

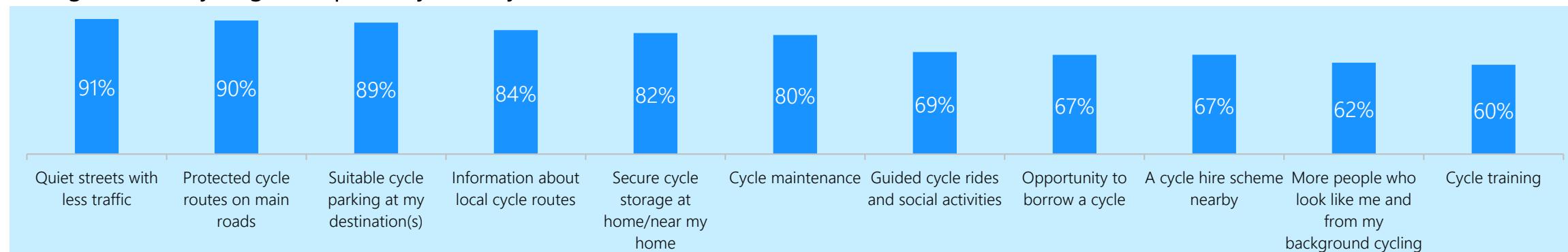
Factors most likely to encourage cycling address the core safety barrier faced by both cyclists and non-cyclists

Encouragement to cycling (T2B) | Total Non-cyclists (not cycled in the last 12 months) who are open to cycling



Secondary encouraging factors tend to be even higher among Black, Asian and ethnic minority people target groups

Encouragement to cycling (T2B) | Total cyclists (cycled in the last 12 months)



Q | Q5. To what extent would the following encourage you to cycle more/take up cycling?

Base | All Non-cyclists who are open to cycling (883), All cyclists (956)

Guided cycle rides and cycle training are particularly motivating for women or those on low income from Black, Asian, and ethnic minority backgrounds

Skews to encouragement to cycling (T2B) | Total Non-cyclists (not cycled in the last 12 months) who are open to cycling

Guided cycle rides and social activities	A cycle hire scheme nearby	Cycle training	More people who look like me and from my background cycling
<ul style="list-style-type: none">• Black, Asian, and ethnic minority women• Black, Asian, and ethnic minority people and low income	<ul style="list-style-type: none">• Asian women	<ul style="list-style-type: none">• Black, Asian, and ethnic minority women• Black, Asian, and ethnic minority people and low income• Women low income	<ul style="list-style-type: none">• Asian women• Black, Asian, and ethnic minority people and low income

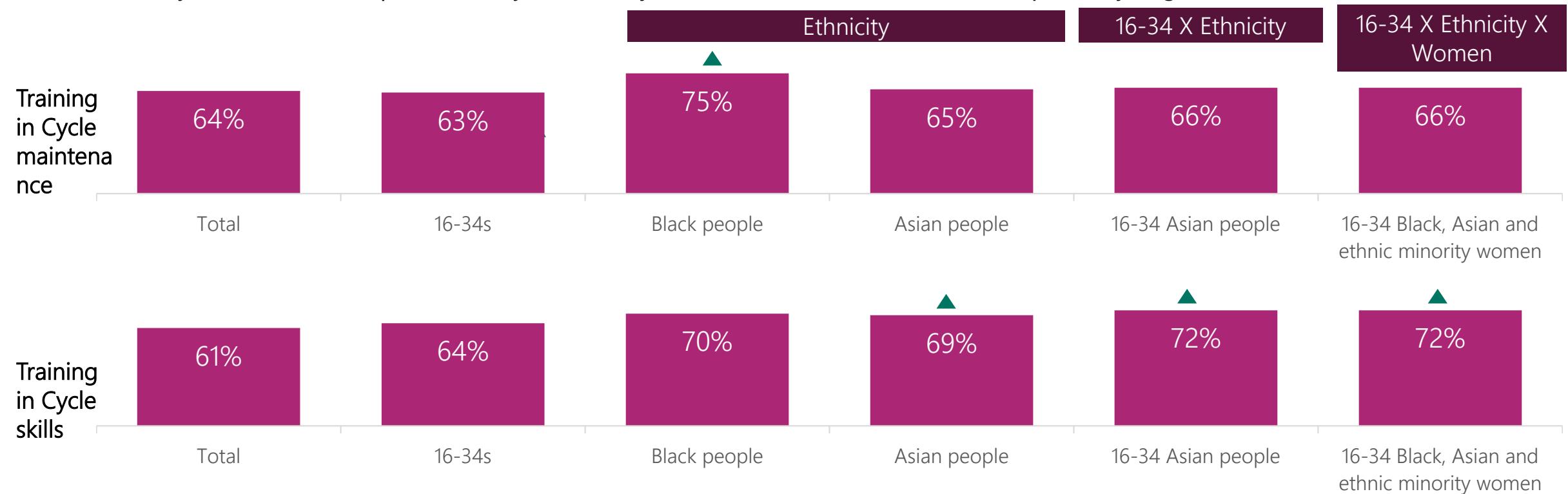
Q | Q5. To what extent would the following encourage you to cycle more/take up cycling?

Base | All Non-cyclists who are open to cycling subgroups: Black people, Asian people, and Ethnic minority women (198), Black, Asian, and Ethnic minority people and low income (84), Women low income (96), Asian women (89)

Key audiences 16-34s and Black, Asian and ethnic minority people would benefit even more from knowledge enhancing schemes

We know these groups are most open to trying cycling – addressing their confidence through these schemes may encourage them to try cycling

Interest in cycle schemes (T2B) | Total Non-cyclists (not cycled in the last 12 months) who are open to cycling



Q | Q7. To what extent would you be interested in taking up/participating in any of the following?

Base | All Non-cyclists Open to cycling (883). Subgroups of Non-cyclists Open to cycling: 16-34s (416); Black people (115); Asian people (168); 16-34 Asian people (97); 16-34 Black, Asian or Ethnic Minority women (119)

Statistically significant vs
Total Non-Cyclists Open to
Cycling at 95% confidence

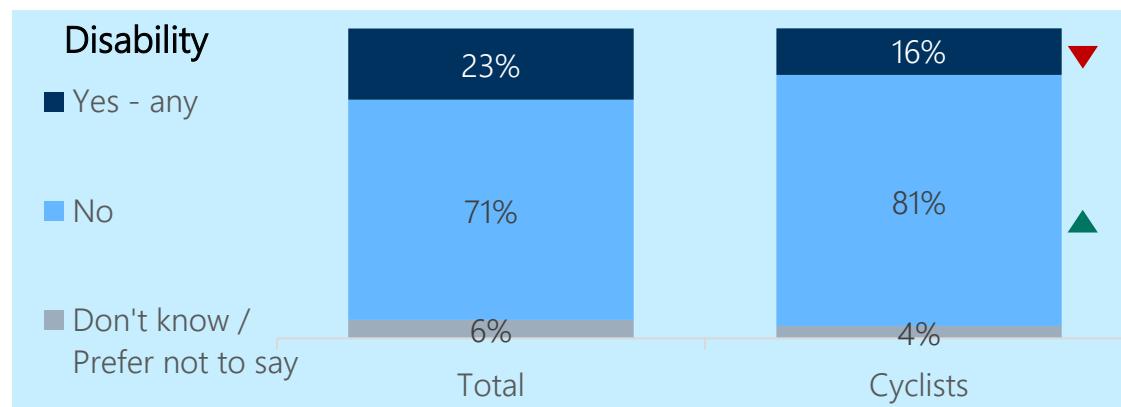
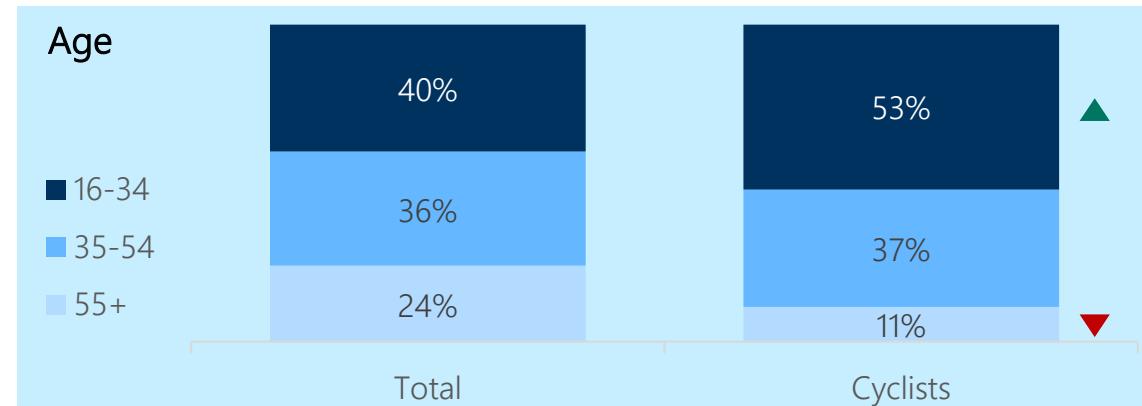
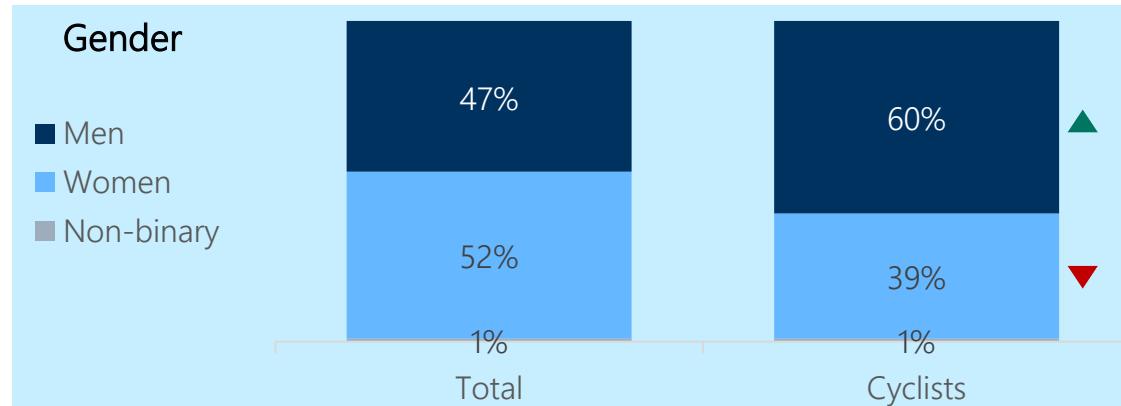


Appendix



Profile of London cyclists

Cyclists profile vs. total sample | Cyclists (in the last 12 months)



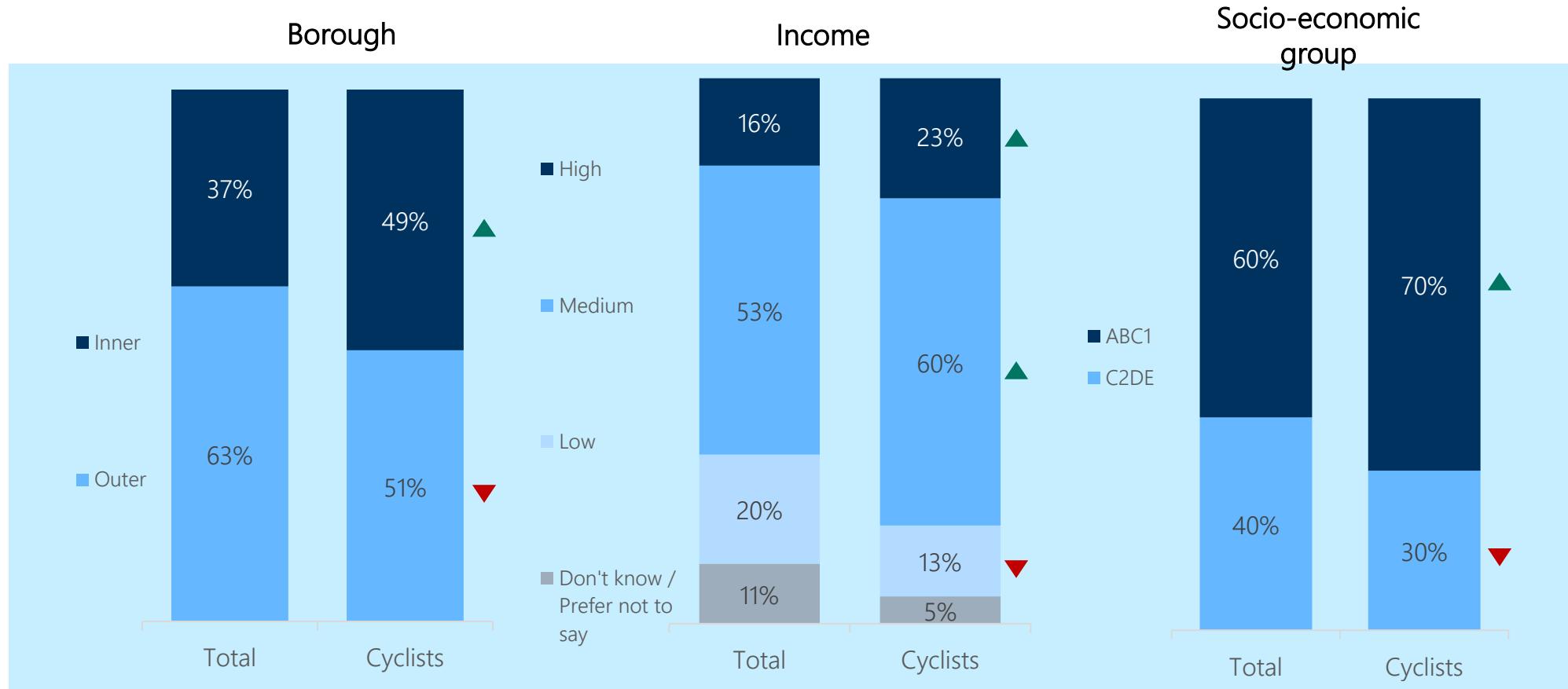
	Total	Cyclist
White people	68%	70%
Black people	9%	8%
Asian people	15%	13%
Mixed ethnicity people	5%	6%
Other ethnic group	2%	2%
Prefer not to say	1%	1%

Q | GENDER, AGE, ETHNICITY, Q9. Do you have any long-term physical or mental impairment which limits your daily activities or the work you can do, including problems due to old age?
 Base | All cyclists (956)

▲▼ Statistically significant vs
Total at 95% confidence

Profile of London cyclists

Cyclists profile vs. total sample | Cyclists (in the last 12 months)



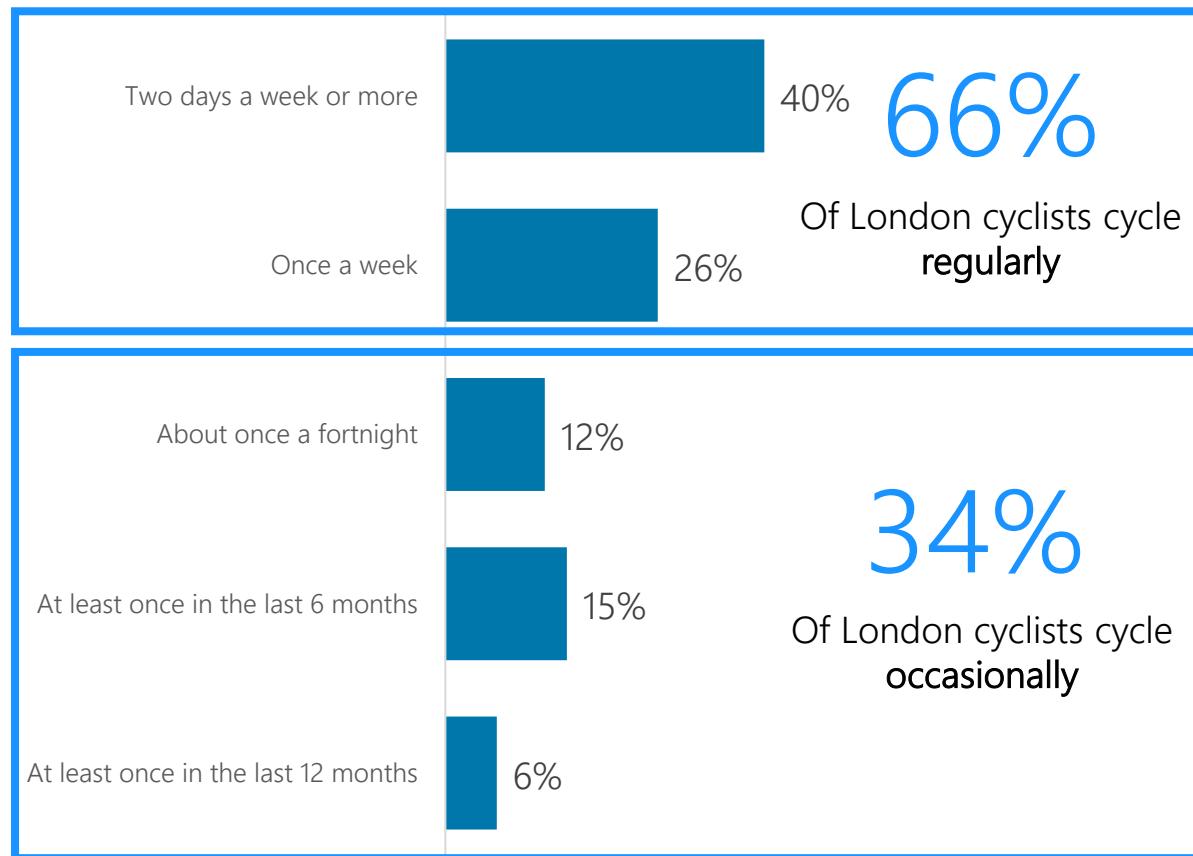
Q | LONDON. Which borough do you live in? INCOME. What is your total annual household income before tax? DSEG
Base | All cyclists (956)

Statistically significant vs Total at 95% confidence

Most cyclists use their bicycle regularly

With two in five saying they cycle at least two days a week

Frequency of cycling | Cyclists



Q | SQ2. How often do you use the following modes of transport to get around London - "Cycling, including e-bike/cycle hire"
Base | All cyclists (956)



Let's talk.
↗

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