

progressive

Cycling Scotland

Attitudes and behaviours towards
cycling in Scotland



Contents



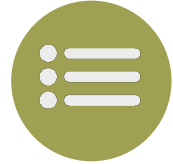
Project background



Transport choices



Impact of life events



Project objectives



Attitudes to driving



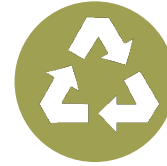
Impact of people and events



Method



Cycling Behaviours



Attitudes towards the Environment



Sample profile



Attitudes to cycling



Summary and conclusions

Project background



Cycling Scotland is working towards a future in which everyone in Scotland can easily enjoy the benefits of regular cycling.

Whilst rates of cycling in the Scottish population are increasing, a large proportion continue to be reluctant to take up cycling for transport or leisure.



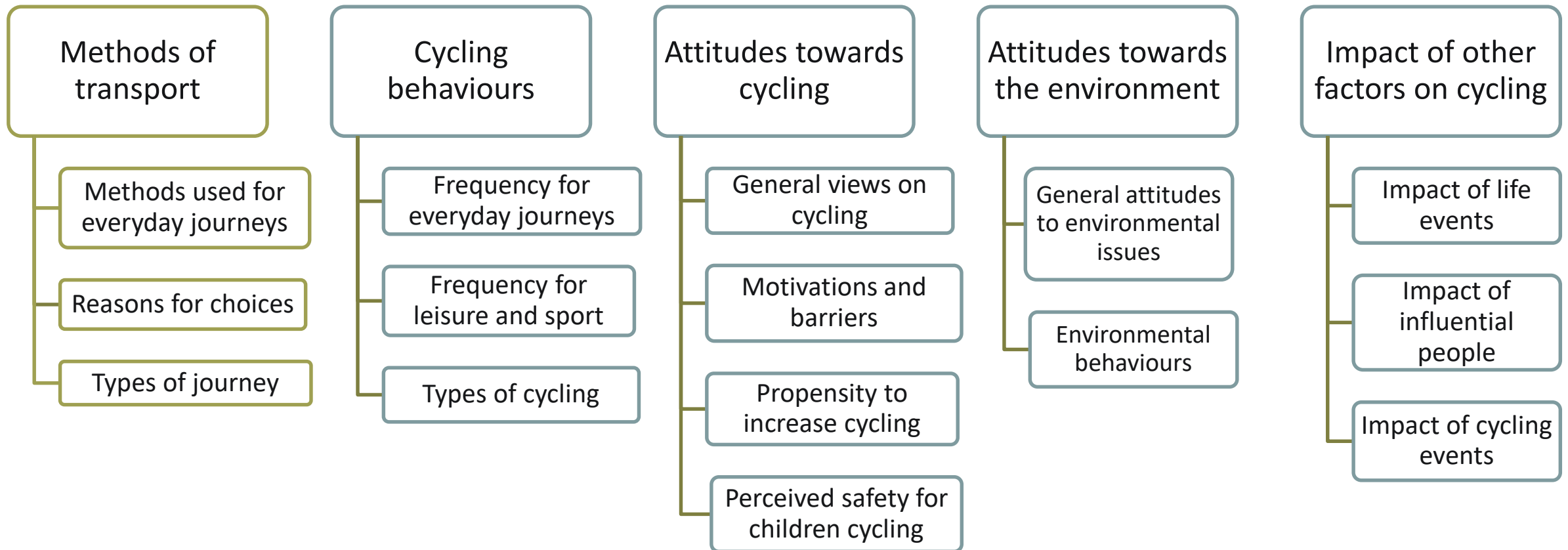
Much research has been conducted investigating cycling attitudes and behaviours – e.g. Scottish Household Survey, GECS campaign tracking, programme specific studies, etc.

However, no specific Scottish population-wide longitudinal research into cycling behaviours and attitudes has been undertaken.

Cycling Scotland commissioned a long-term research study to:

- consult the full breadth of Scottish population;
- gather data on perceptions of and barriers to cycling;
- provide effective and implementable recommendations for action.

Project objectives



- The data was gathered using face-to-face CAPI interviews – 1060 interviews were conducted.
- Each interview was approximately 13 minutes long.
- The sample was gathered from across Scotland. Almost all Scottish local authorities were included.
- Quotas were set on demographics (age, gender, socio-economic group) to ensure a sample representative of Scottish population.
- Fieldwork was conducted between 28th August and 19th September 2017.
- The margin of error on a sample of 1060 is between +/- 0.6% and +/- 3.0% at the 95% confidence interval.*

* As quotas were used the sampling type is non-probability. The margin of error is calculated on the basis of an equivalent probability sample.



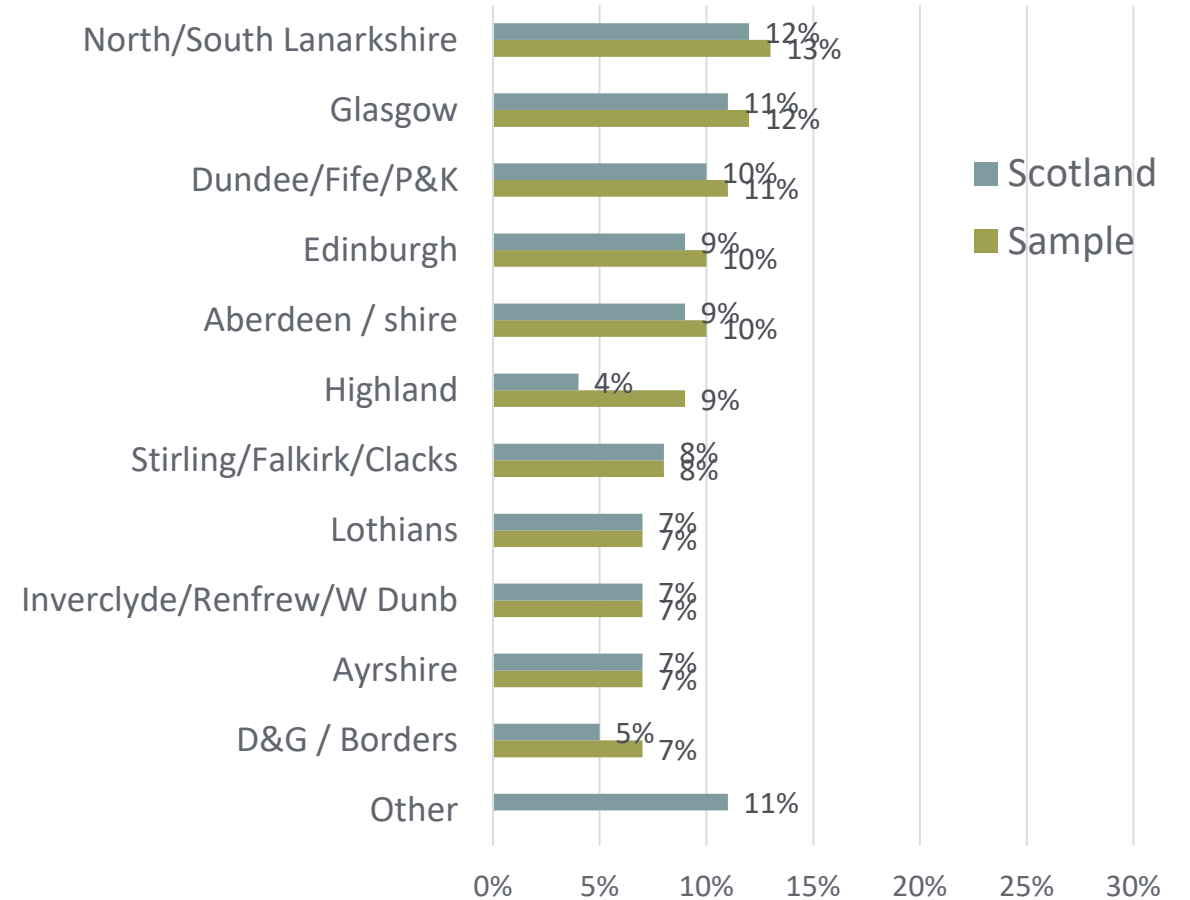
Sample profile

Sample profile

Location

- Sample designed to provide a broadly representative spread across the Scottish population.
 - Sampling did not include remote rural areas or islands
- Sampling also aimed to provide a mix of urban and rural locations.
- Highland is higher than Scottish population – additional interviews were conducted in order to compensate for not conducting interviews on islands.

Local authority



Base (all): 1060

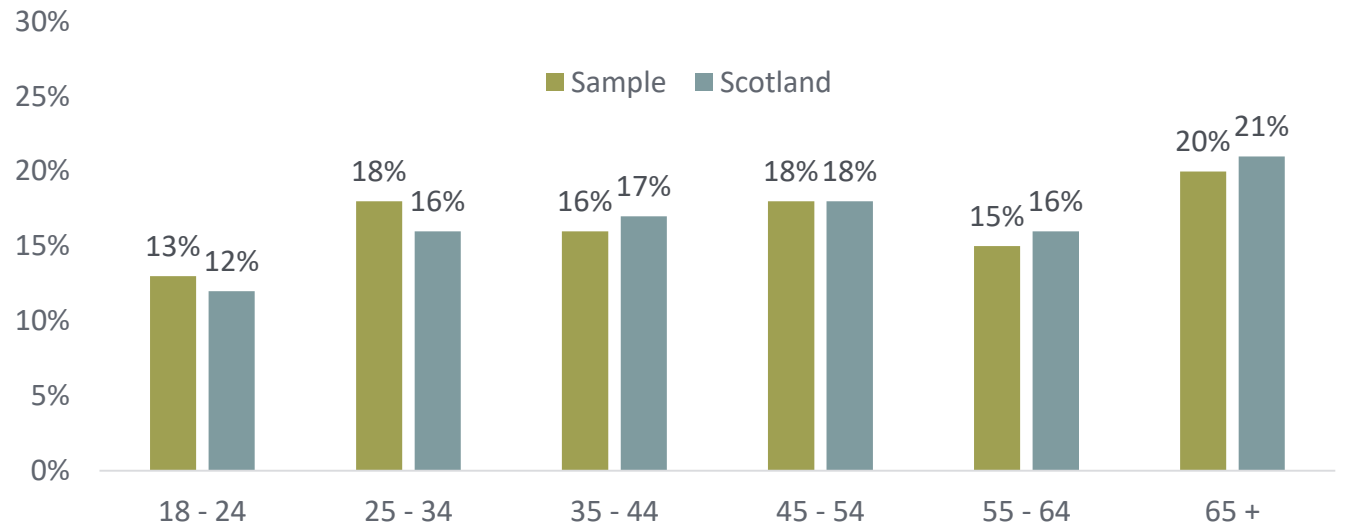
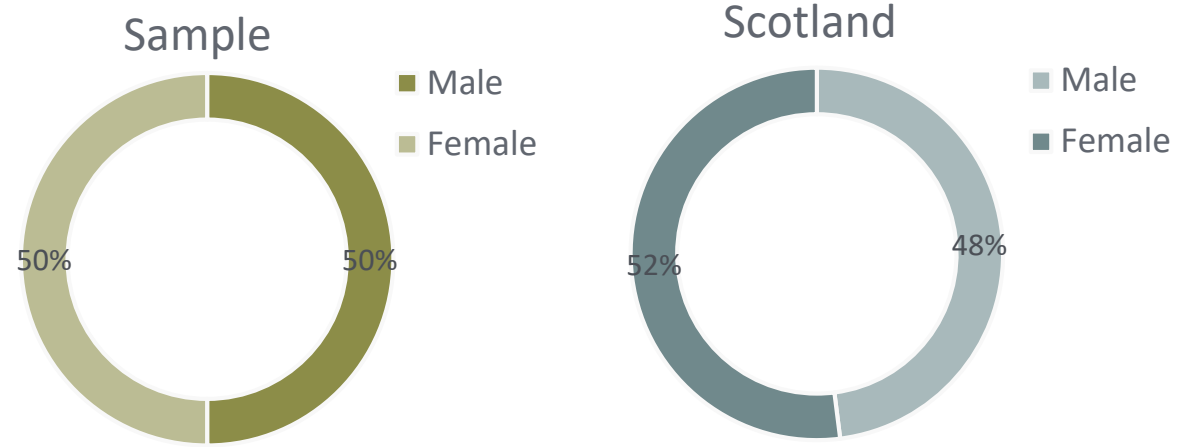
Sample profile

Age and gender



- Quotas were set on age and gender to broadly reflect national Scottish statistics.
- Sample evenly split between males and females.

Age and gender



Base (all): 1060

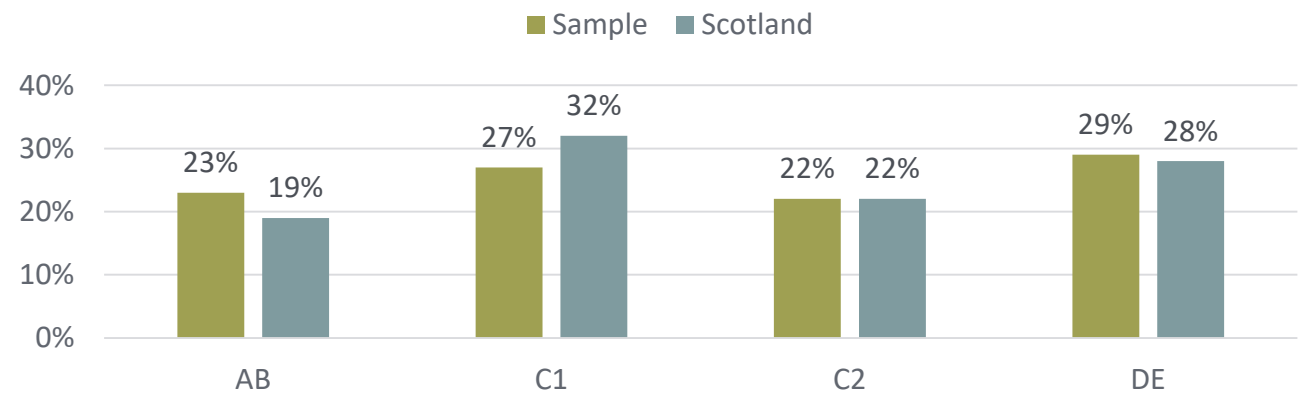
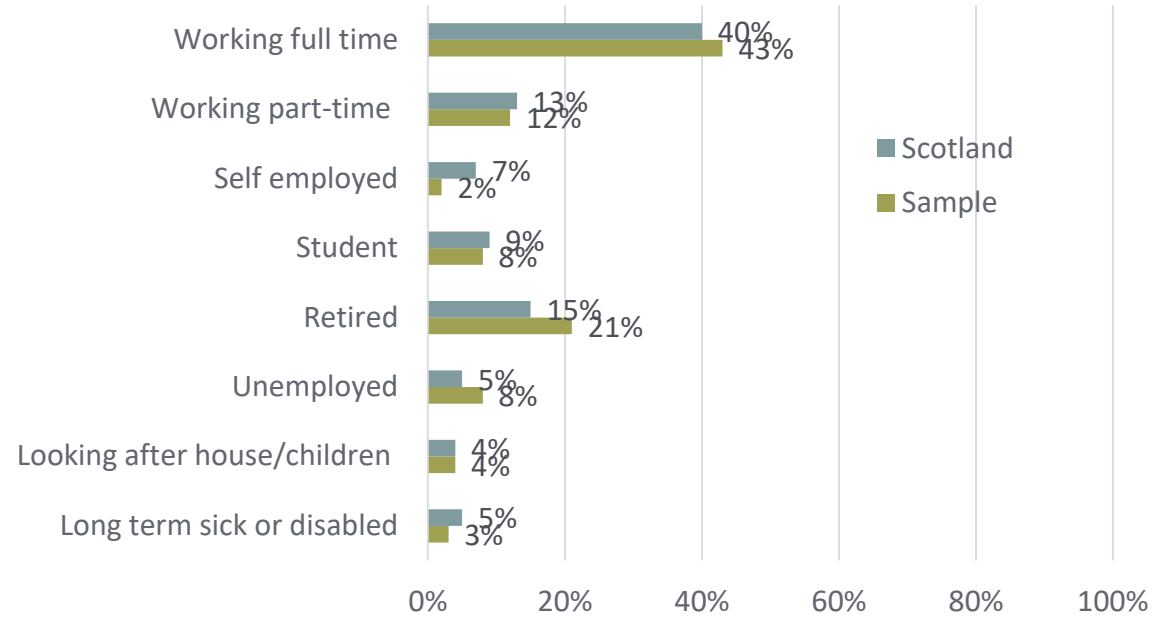
Scotland statistics source: Census 2011

Sample profile

Socio-economic

- Quotas were also set on socio-economic group – 50% ABC1; 50% C2DE.
 - The sample's socio-economic profile is in line with Scottish statistics, with slightly higher in AB and lower in C1 groups.
- Working status was left to natural fall out.
- This has come in broadly consistent with national statistics.
 - Sample has fewer self-employed and more retired than national statistics.

Working status and SEG



Base (all): 1060

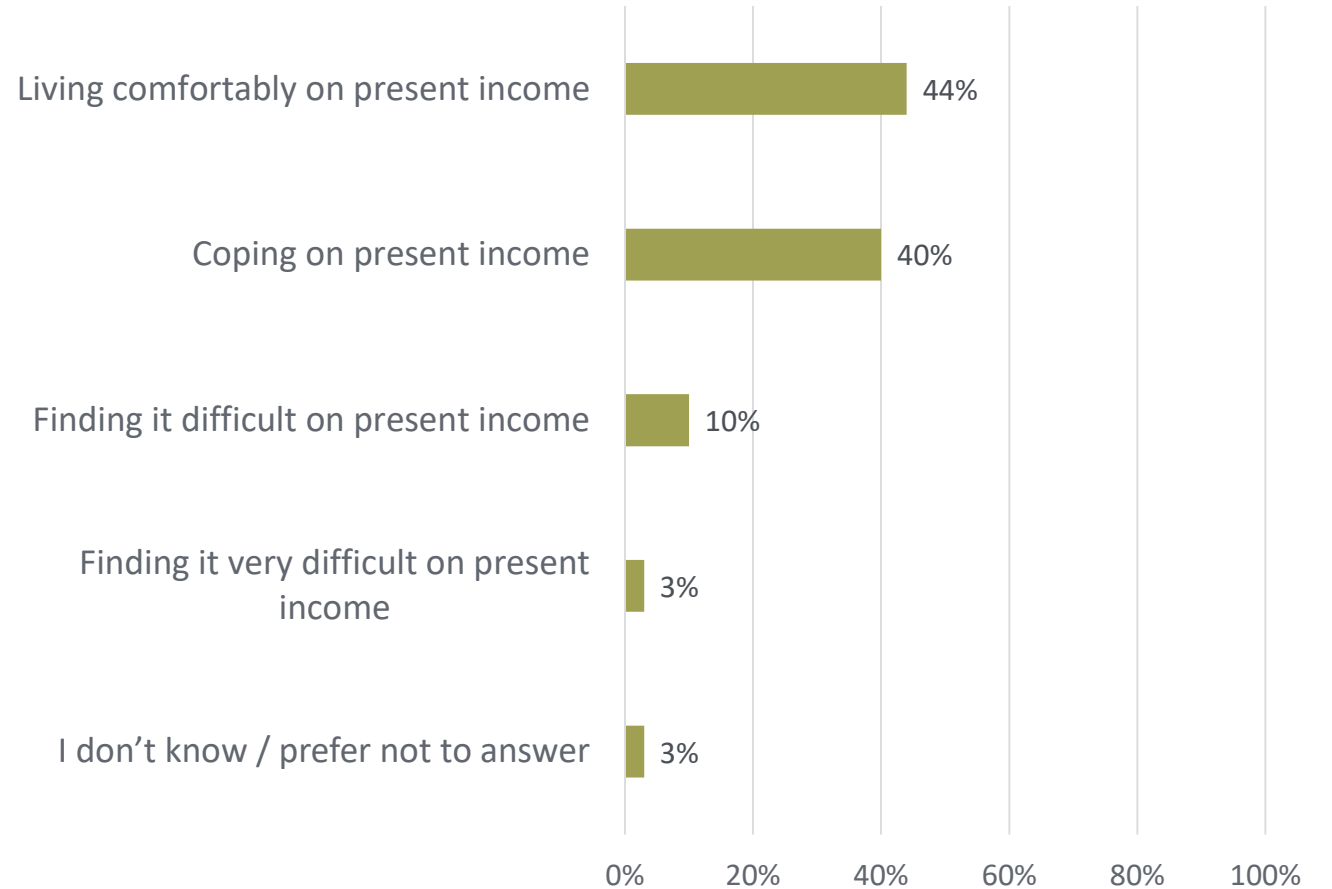
Scotland statistics source: Census 2011

Sample profile

Socio-economic

- The majority of respondents (84%) reported that they are either living comfortably on their current income or coping on their current income.
- Only 13% were having difficulties with their current income.

Ability to manage on current income



Q26: Which of the following descriptions comes closest to how you feel about your household's income at present?

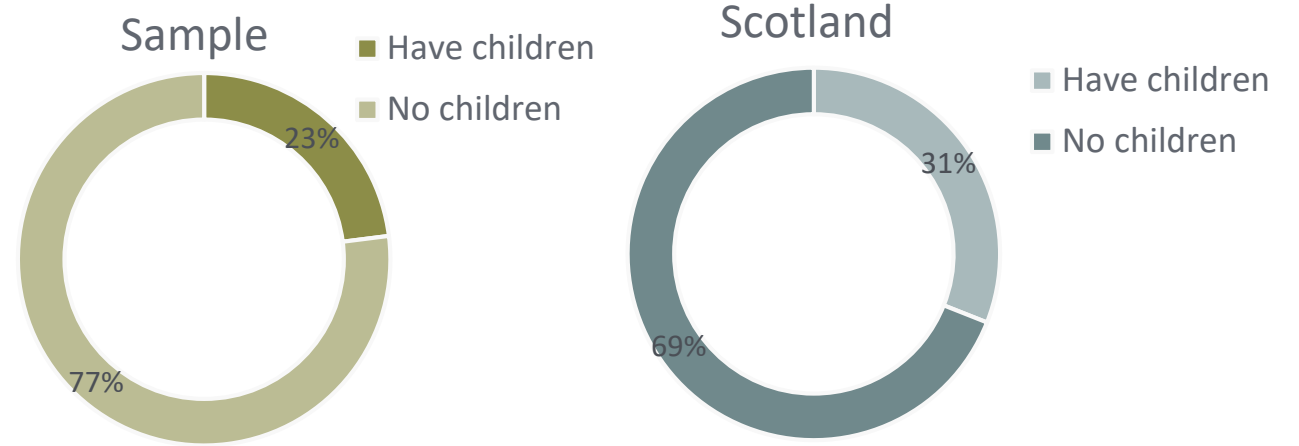
Base (all): 1060

Sample profile

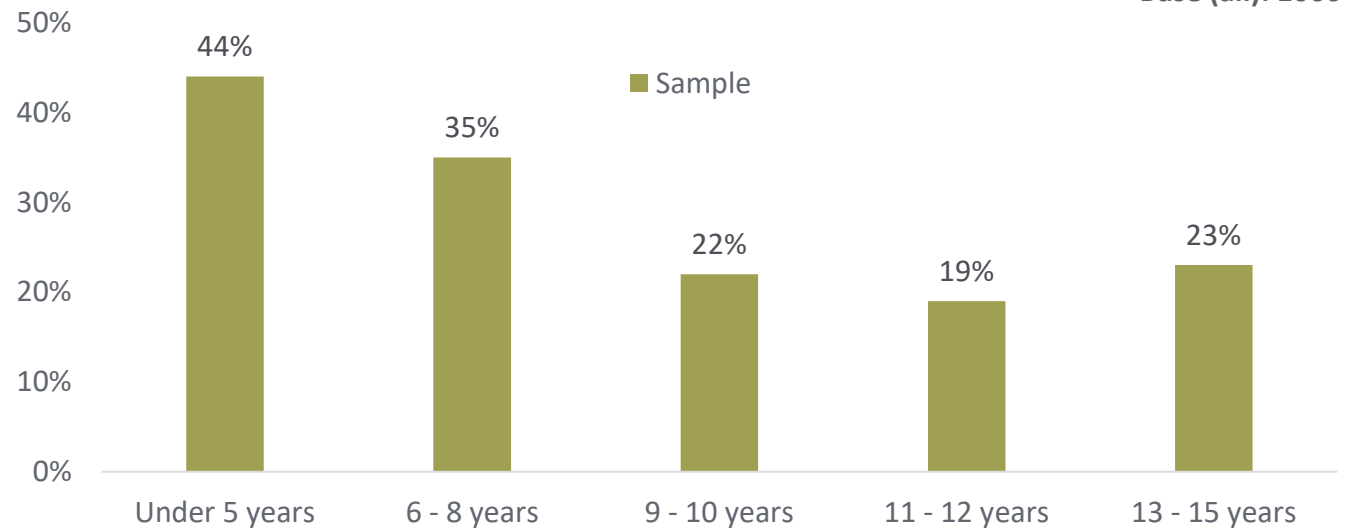
Children

- Almost one quarter had children under 16 years old in the household.
 - Fewer than population figure of 31%
- The ages of children were weighted to younger age groups.
- 71% of parents had children aged between 6 and 15 years old – and therefore have potential to cycle.

Children in household



Base (all): 1060



Base (all with children): 248

Scotland statistics source: Census 2011

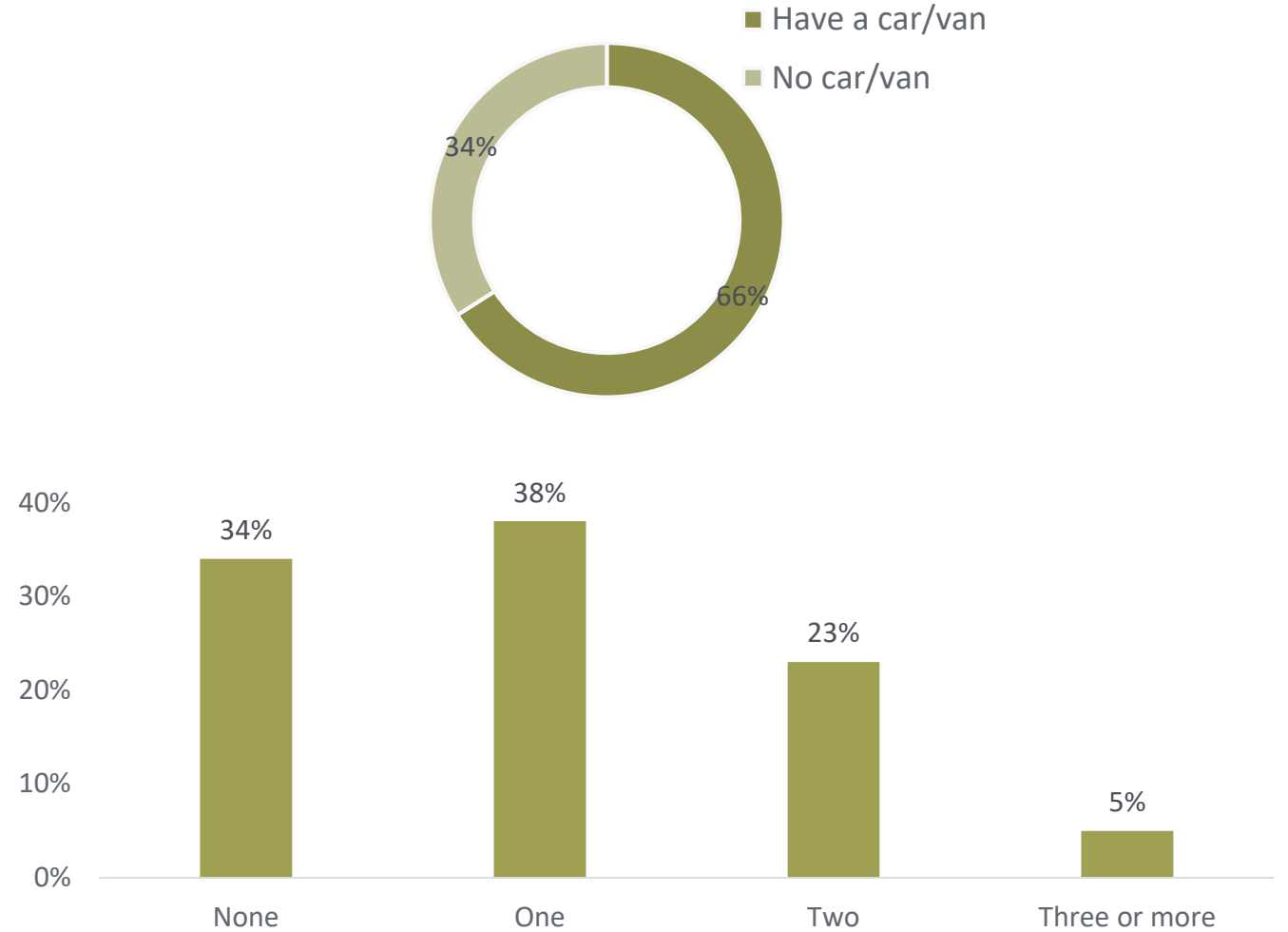
Sample profile

Car ownership



How many cars/vans available for use in your household?

- Two thirds of respondents reported having access to a car or van in the household.



Q28: How many cars or vans do you own, or are available for use, in your household?

Base (all): 1060

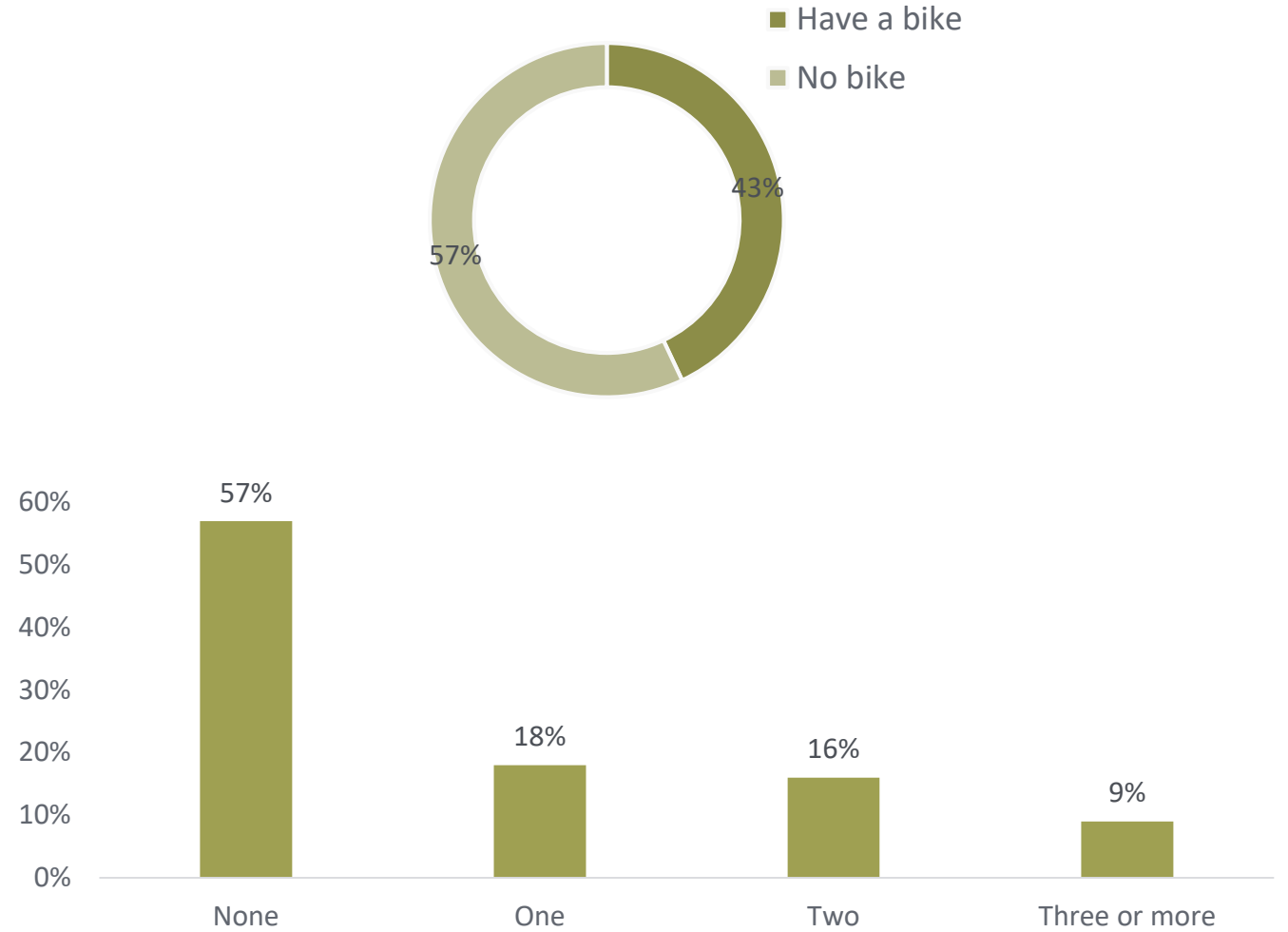
Sample profile

Bicycle ownership



- 43% of respondents reported having access to an adult bike in their household.

How many bikes available for use in your household?



Q27: How many adult bicycles do you own, or are available for use in your household?

Base (all): 1060

Summary



- We have interviewed a robust and representative sample of the Scottish population.
- This provides a sound basis for top line data analysis, as well as various sub-groups for sub-sample analysis.



Transport choices

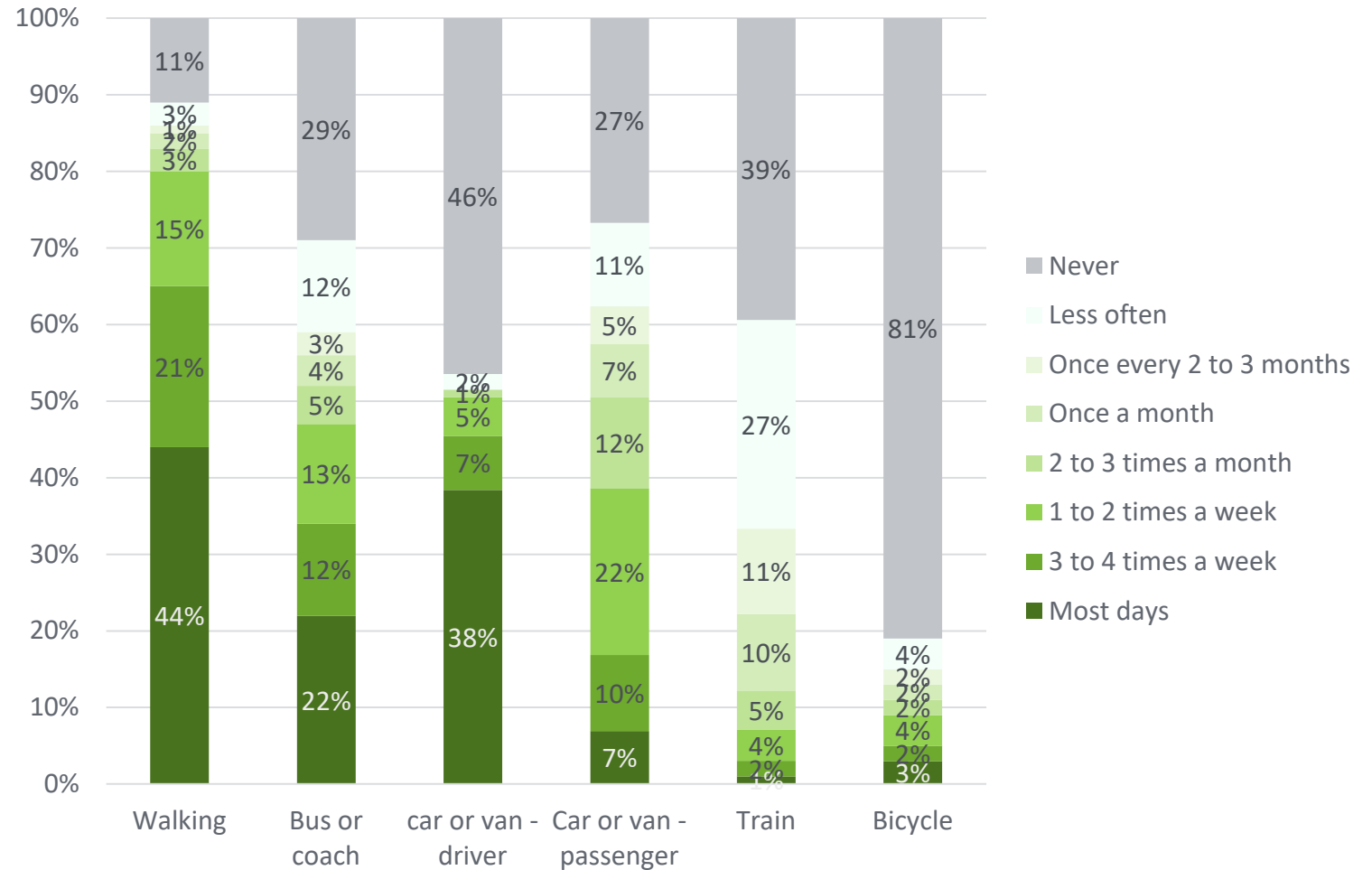
Transport choices

Frequency

- Walking was the most frequent mode for everyday journeys - 80% walk at least once a week.
- Around half of respondents drive or take a bus at least once a week.
- 19% of population ever cycle for everyday journeys. 10% cycle for everyday journeys at least once a week.
- Those most likely to ever cycle for journeys were males (26%, females 12%), under 55 year olds (24%, over 55s 10%), and ABs (27%, C1s 16%, C2s 20%, DEs 15%).
- Males were more likely to cycle at least once a week (15%) compared to females (5%).

Q1: How often do you use the following modes of transport for journeys, such as going to work, to the shops, taking kids to school or going out socially at night?

Frequency of modes for everyday journeys



Base(all):1060

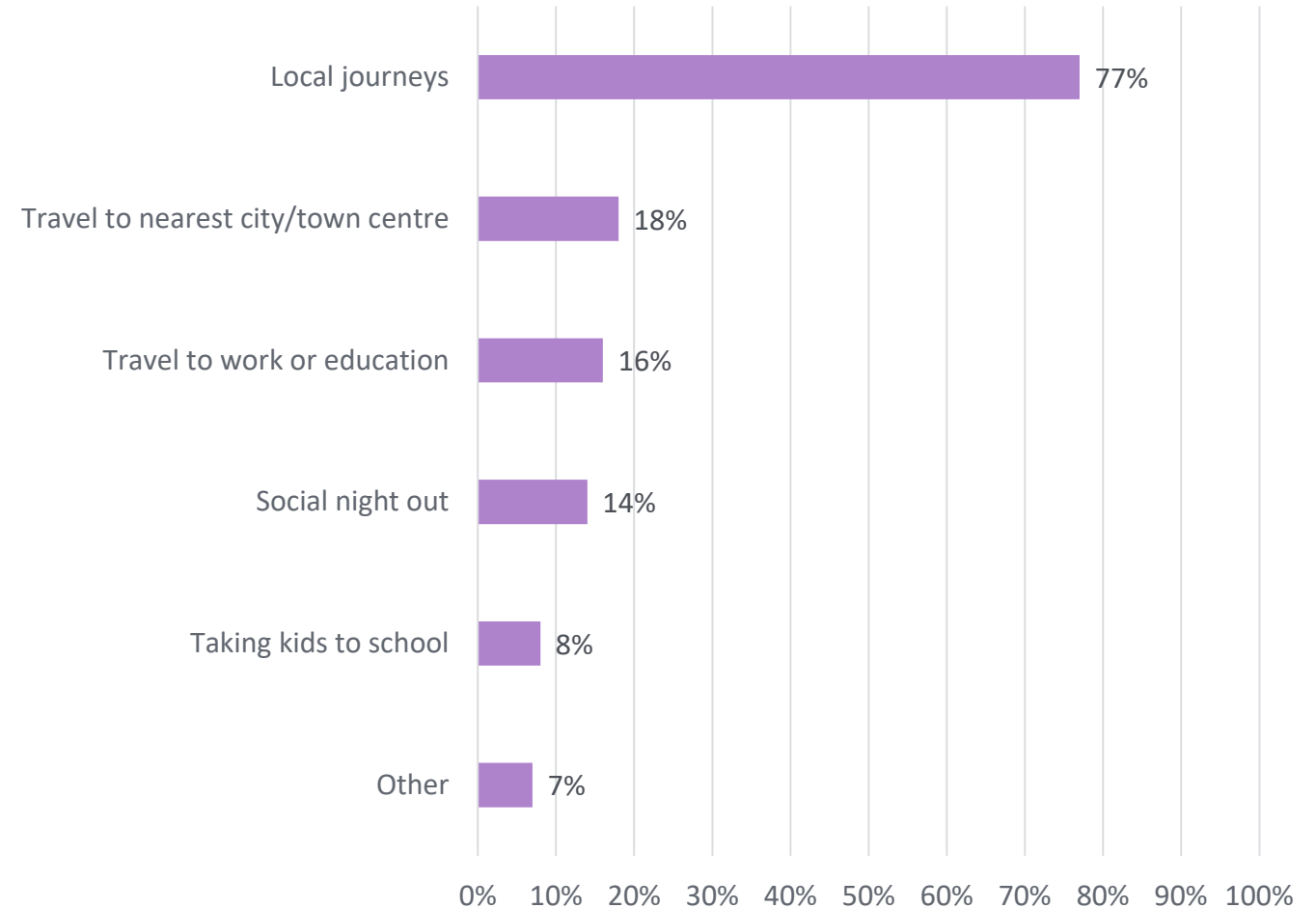
Transport choices

Journey types

- 85% of the total sample walk for journeys at least once a month.
- As expected, walking is a travel option predominantly for local journeys.
- 18% walk to their nearest town centre and 16% also mentioned walking for commuting.

Q3: For each of the means of travel you use, please tell me what types of journey you use it for?

What types of journey do you use it for? – Walking



Base (all walking): 901

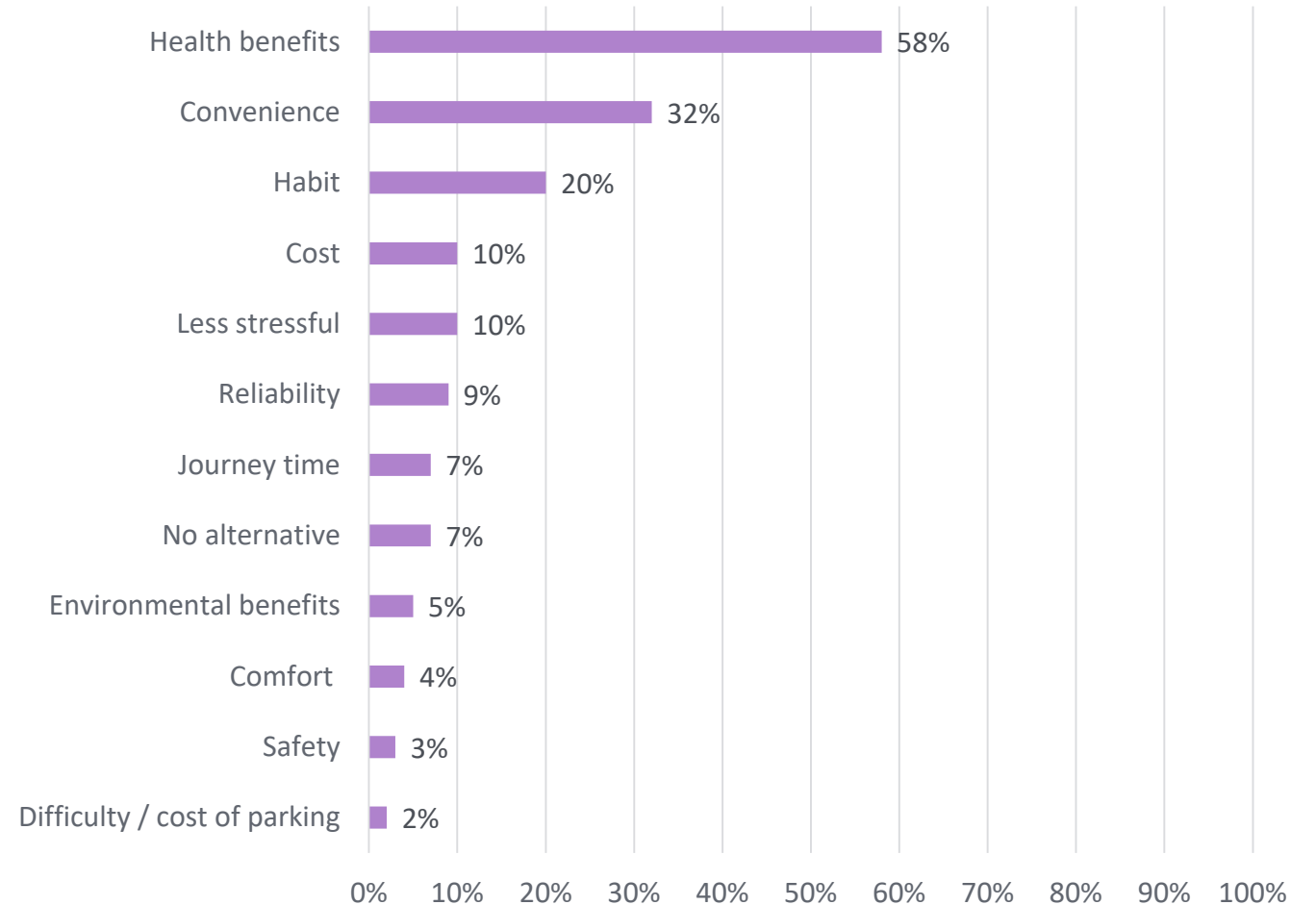
Transport choices

Reasons

- Improving your health is the key reason for walking.
- One third also stated that walking is a convenient option, and one fifth walk out of habit.
- Environmental benefits was mentioned by 5% of people who walked for everyday journeys.

Q2: For each of the means of travel you use, please tell me why you travel this way?

Why do you travel this way? – Walking



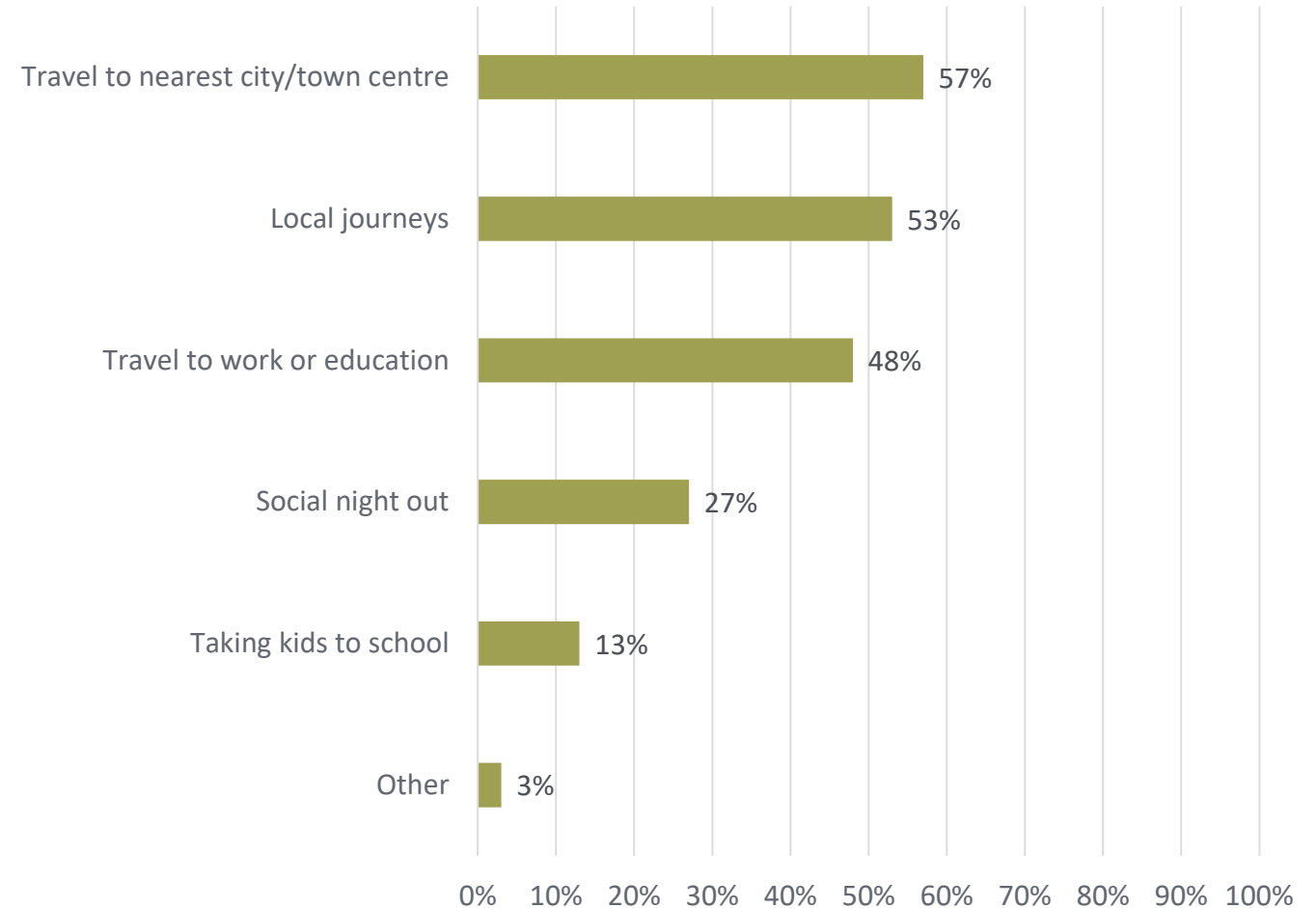
Base (walking): 901

Transport choices

Journey types

- 80% of the sample travel by car (as a driver or passenger) at least once a month.
- Cars are used for a variety of journeys, including travel to towns/cities, local journeys and commuting.
- It is significant that over half of car drivers use their car even for local journeys.

What types of journey do you use it for? – Car / van



Q3: For each of the means of travel you use, please tell me what types of journey you use it for?

Base (all car / van): 849

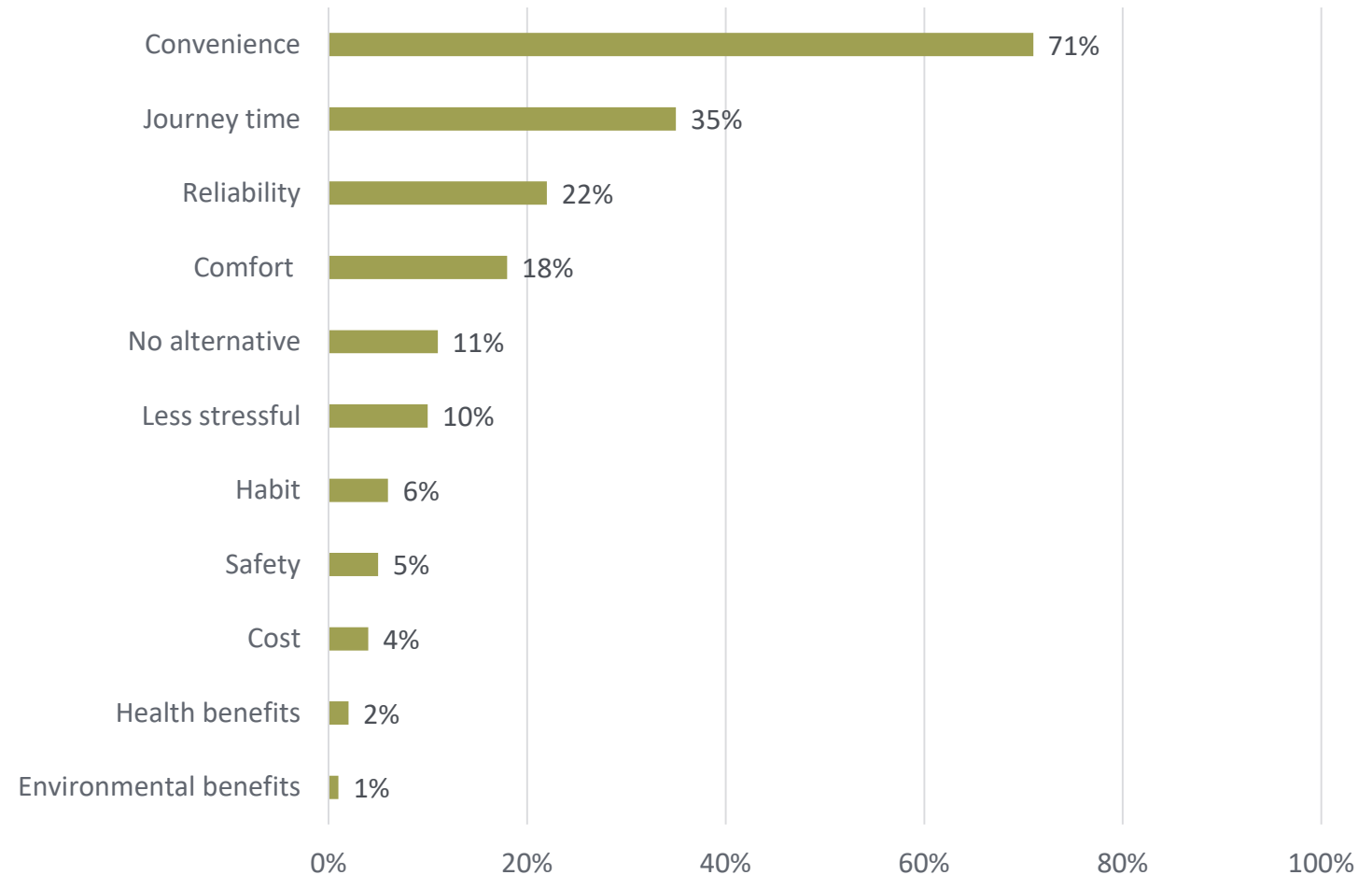
Transport choices

Reasons

- The key motivation for travel by car is convenience.
- Just over one third also mentioned journey time.
- 22% mentioned the reliability of car travel, and 18% liked the comfort.

Q2: For each of the means of travel you use, please tell me why you travel this way?

Why do you travel this way? – Car / van



Base (all car/van – including drivers and passenger): 849

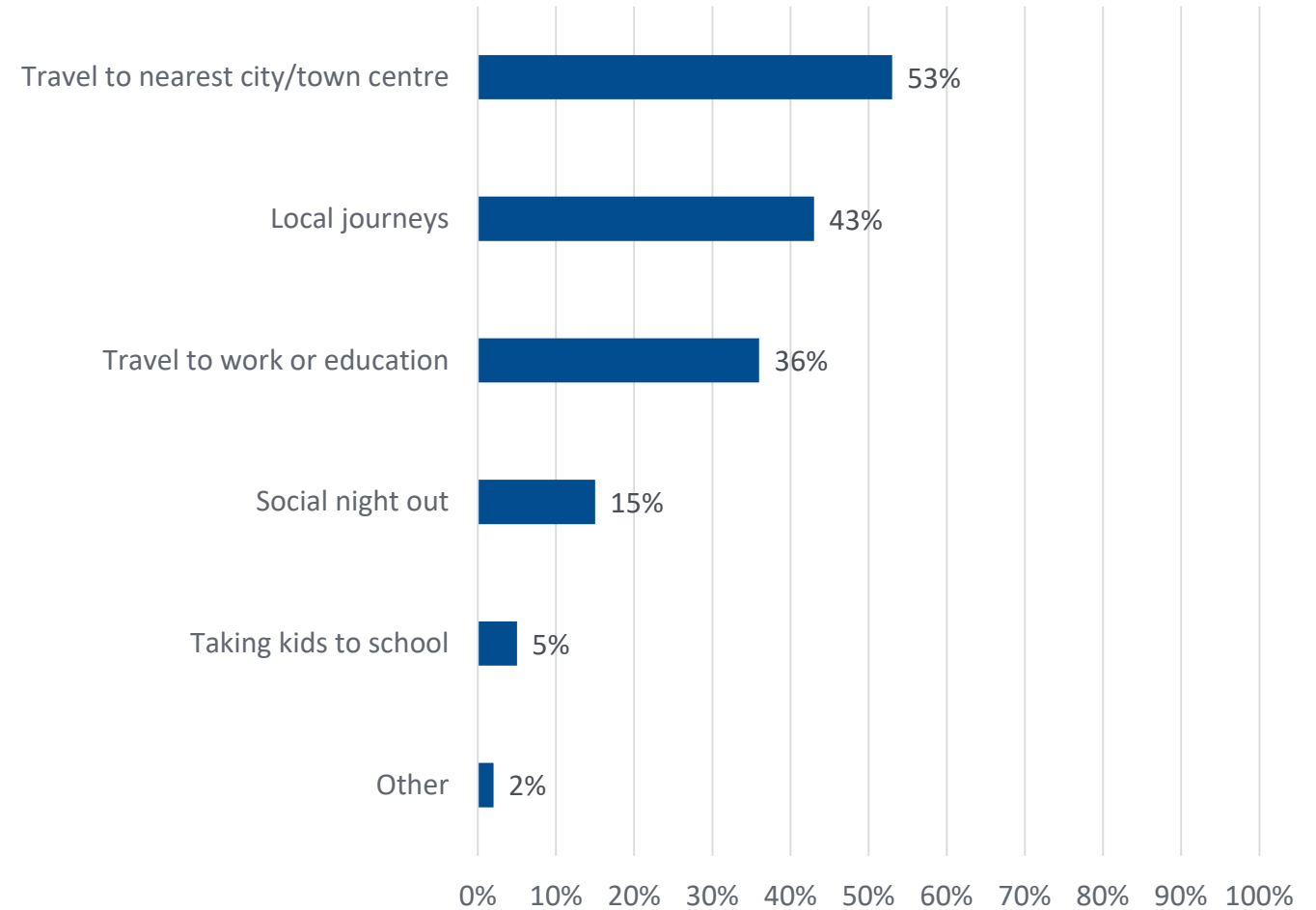
Transport choices

Journey types

- 56% of the total sample travel by bus at least once a month.
- Buses are used for a variety of journeys, but for most it's for travel into nearest town or city and local journeys.
- Just over one third use the bus for their commute.

Q3: For each of the means of travel you use, please tell me what types of journey you use it for?

What types of journey do you use it for? – Bus / coach



Base (all bus / coach): 598

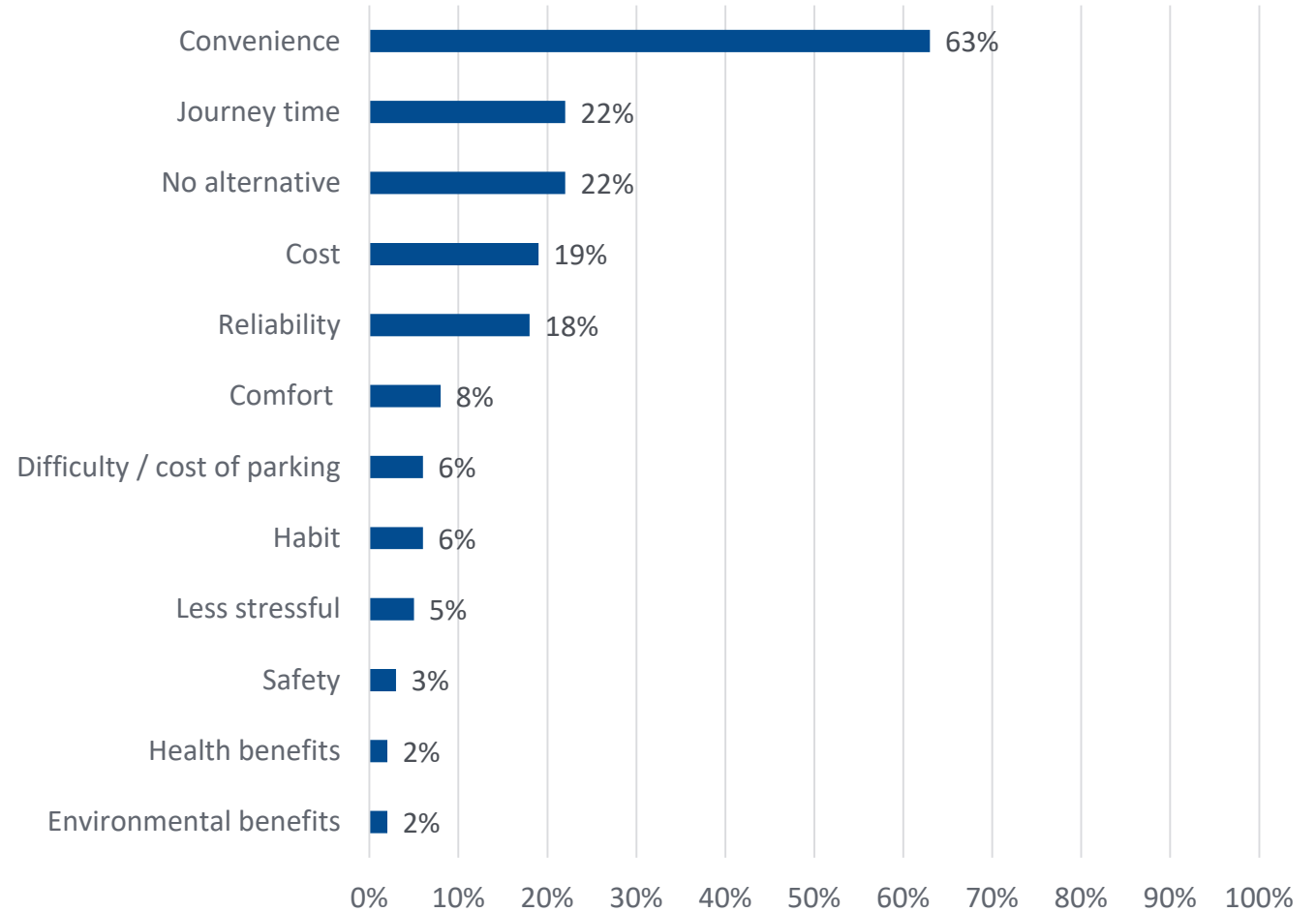
Transport choices

Reasons

- The key motivation for bus travel is convenience.
- Around one fifth also mentioned journey time, cost and reliability.
- 22% reported that they didn't have any other options.
- Very few spontaneously stated environmental concern as a reason to take the bus.

Q2: For each of the means of travel you use, please tell me why you travel this way?

Why do you travel this way? – Bus / coach



Base (all bus / coach): 598

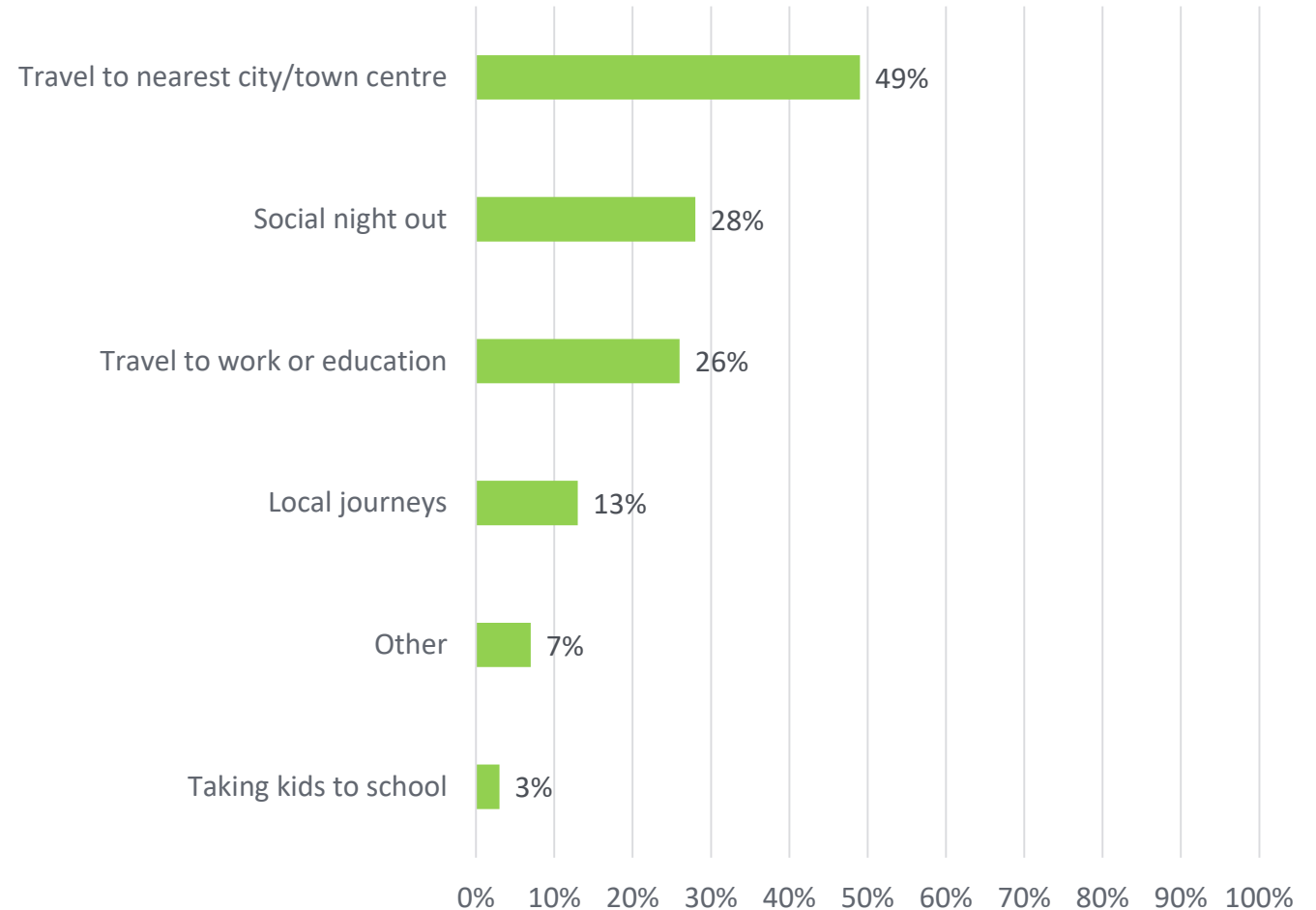
Transport choices

Journey types

- 23% of the total sample travel by train at least once a month.
 - This proportion is likely to be significantly higher in areas served by the rail network.
- Almost half of those who travel by train use it to get into their nearest town or city centre.
- One quarter also use the train for commuting, and 28% travel by train for nights out.

Q3: For each of the means of travel you use, please tell me what types of journey you use it for?

What types of journey do you use it for? – Train



Base (train): 242

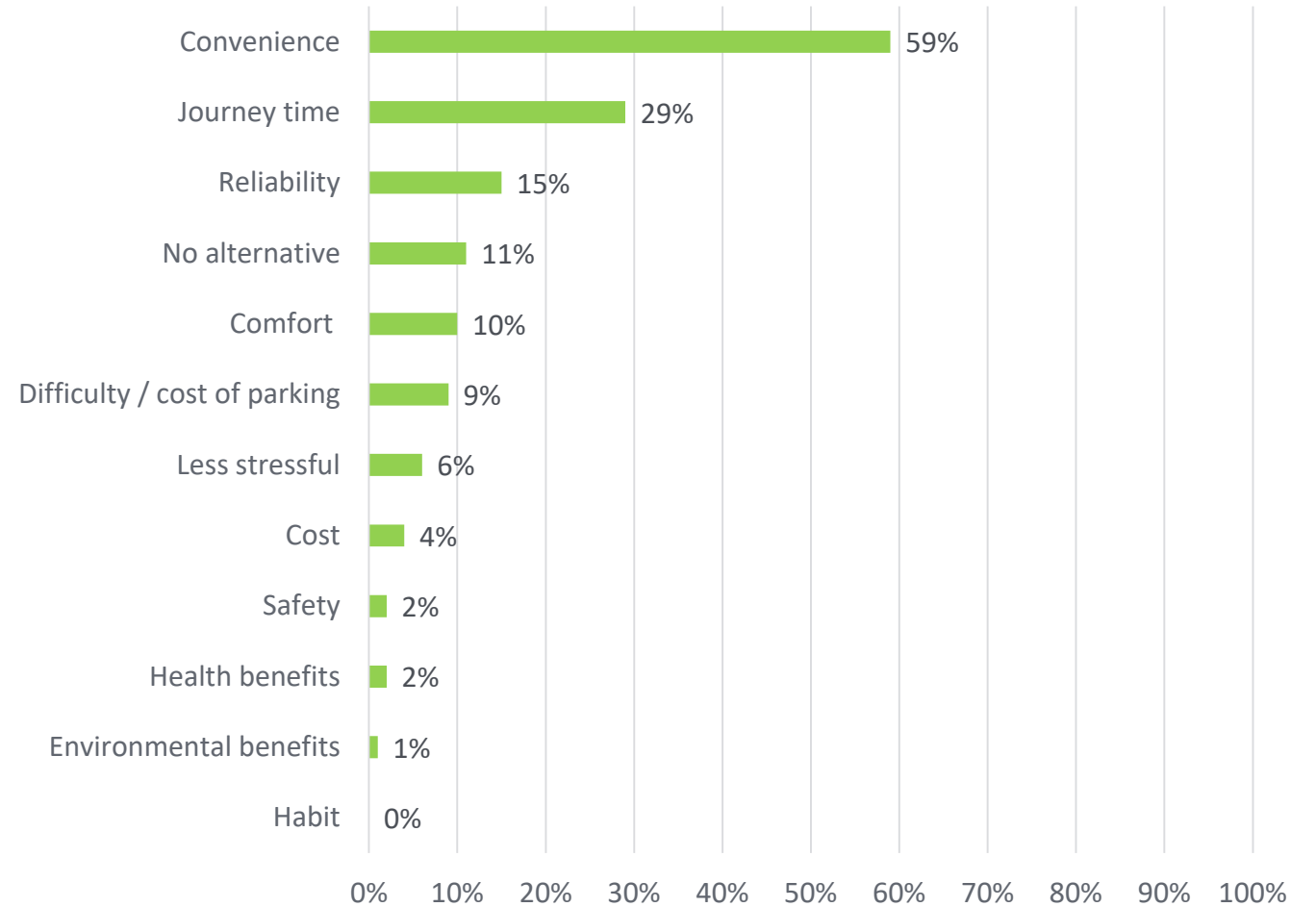
Transport choices

Reasons

- The key reason for choosing to travel by train is convenience (59%).
- 29% also stated that it is a quicker way to travel.

Q2: For each of the means of travel you use, please tell me why you travel this way?

Why do you travel this way? – Train



Base (all train): 242

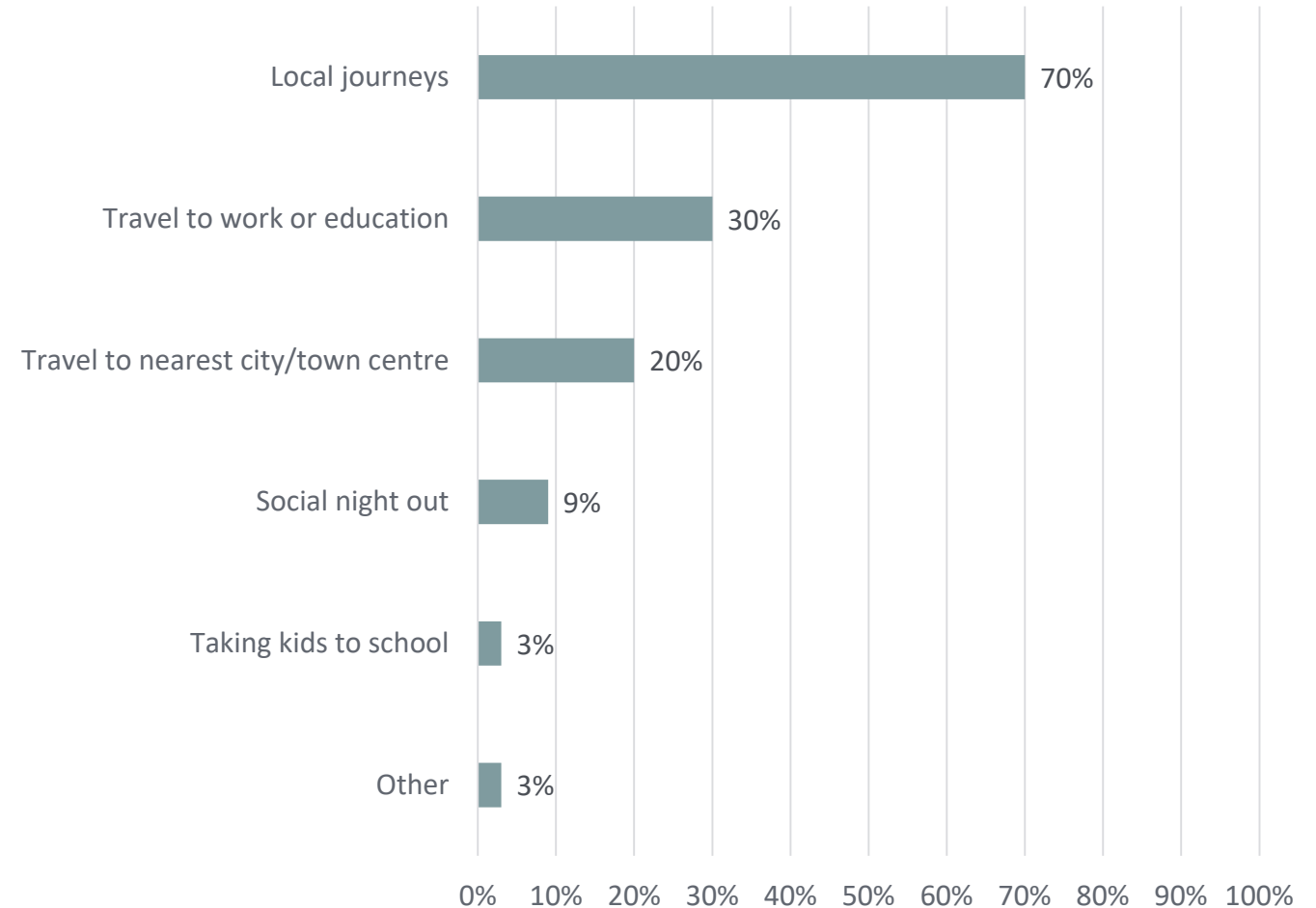
Transport choices

Journey types

- 13% of the sample cycle for everyday journeys at least once a month.
- Cycling is predominantly used for local journeys.
- 30% of people who cycle for everyday journeys also mentioned commuting by bike.
 - This equates to 4% of the total sample.

Q3: For each of the means of travel you use, please tell me what types of journey you use it for?

What types of journey do you use it for? – Bicycle



Base (all bicycle): 137

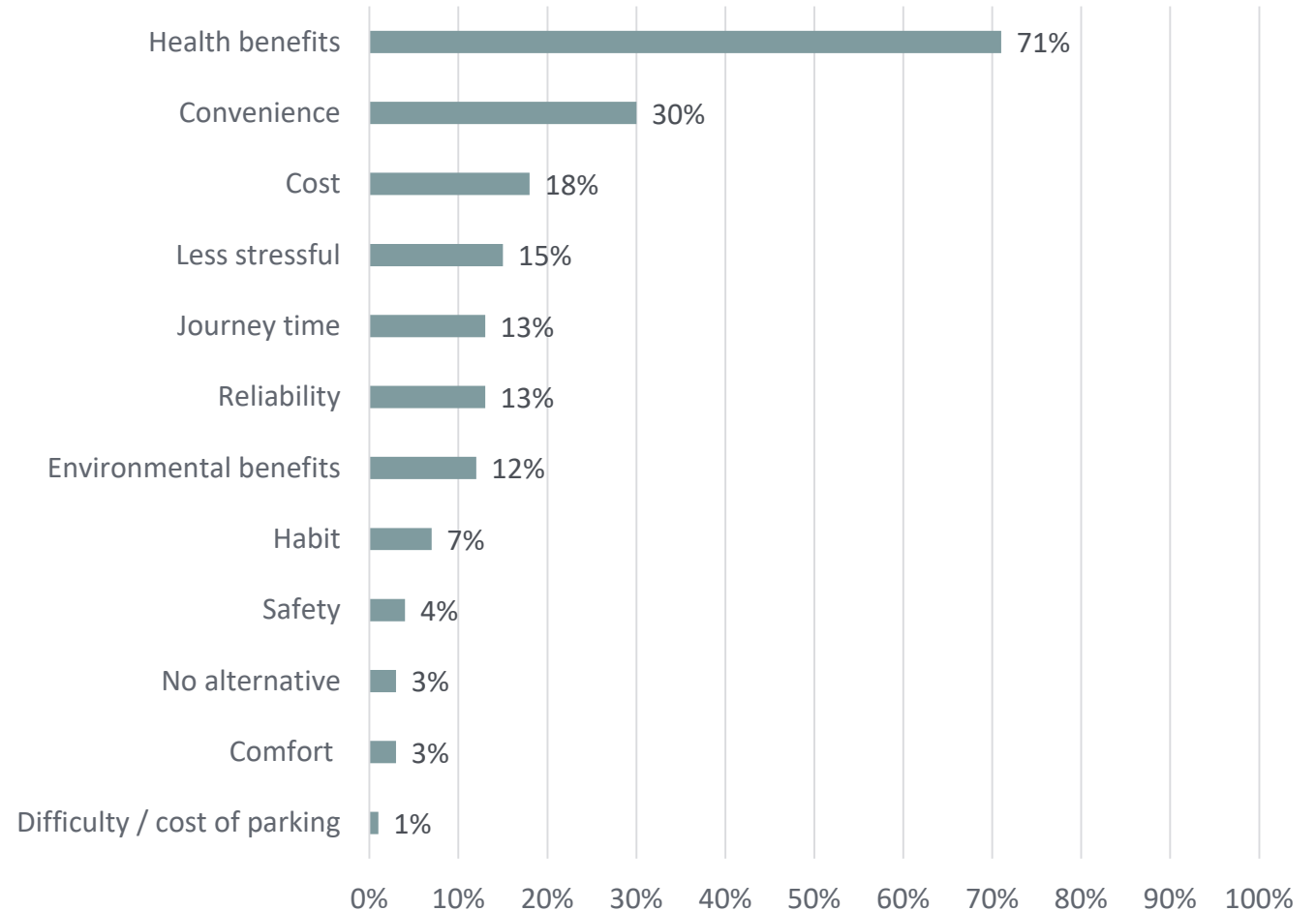
Transport choices

Reasons

- The overwhelming reason for cycling for everyday journeys is health benefits. The older the respondent, the more likely they are to mention health benefits (92% of 55+; 61% of under 35s).
- Almost one third of people who cycle also mentioned convenience.
- 18% cycle because it is a less expensive option. Cost is more important to under 35 year olds and C2DEs.
- A variety of other benefits was mentioned by the sample, including less stressful, journey time and reliability.
- People who cycle are more likely to mention the environmental benefits of their choice of transport (12%) than people using any other transport type.

Q2: For each of the means of travel you use, please tell me why you travel this way?

Why do you travel this way? – Bicycle



Base (all bicycle): 137

Key insights

Transport choices



- Non-active transport options tend to be chosen primarily for convenience and journey time.
- Cycling and walking are most often selected for local journeys and for health benefits. Convenience is the key secondary reason.
- Cycling is the only travel mode which is chosen by a significant proportion for environmental reasons – 12%.
- One in five (19%) ever cycle for everyday journeys and one in ten regularly cycle for everyday journeys (at least once a week).
 - The proportion who ever cycle for journeys is higher for some sub-groups – males (26%), ABs (27%), under 55s (24%).

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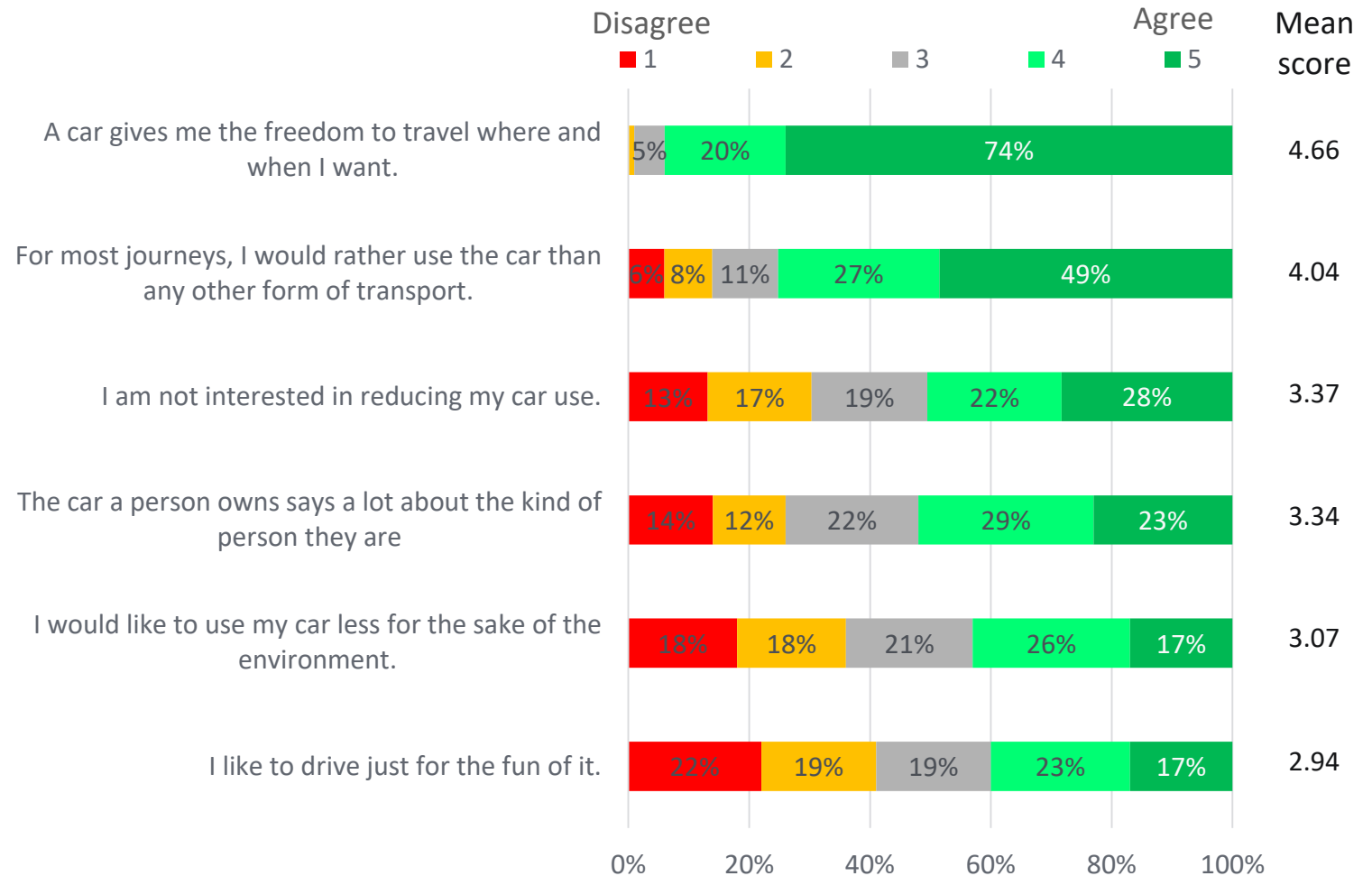
Attitudes to driving

Attitudes to driving

- The majority of car drivers appear to be committed to this form of transport.
 - Three quarters agree that they would rather use it than any other form of transport
 - 51% agree that they are not interested in reducing their car use
 - 94% agree that it gives them freedom to travel where and when they want
- However, there is a significant minority who would like to use their car less.
 - 43% would like to use it less for the sake of the environment
 - 30% disagree that they are not interested in reducing their car use

Q4: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Agreement / disagreement with statements on driving (drivers only)



Base (all drivers): 546

Attitudes to driving

Sub-sample analysis



- There were very few significant variances by the demographic profile.
 - Males and younger respondents are more likely to agree that they like to drive for the fun of it.
 - Younger respondents (under 35) are also more likely to state that they would rather use the car than any other form of transport.
- Drivers who are also cyclists are more likely to agree that they would like to use their car less for the sake of the environment (58% agree) than non-cyclist drivers (36%).



Cycling behaviours

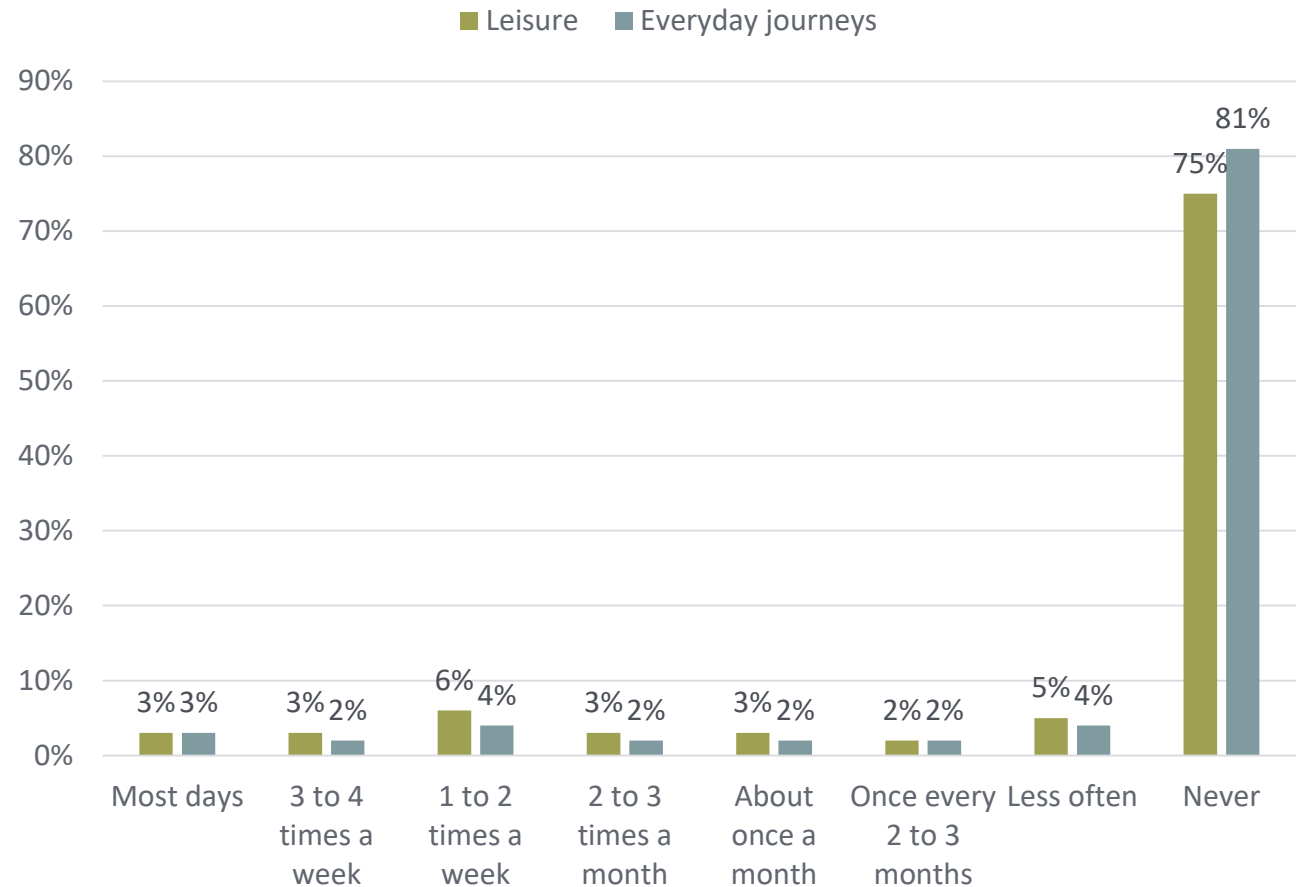
Cycling behaviours

Frequency

- One quarter of people cycle for leisure and 19% cycle for everyday journeys at least occasionally.
- Combining both questions, 27% of the population ever cycle either for transport or leisure.
- Around one tenth of the population cycle at least once a week.
- Cyclists are more prevalent amongst:
 - Males (33%, compared to 21% females)
 - Under 55 year olds (34%, compared to 13% 55+)
 - AB socio-economic group (40%, compared to 20% DEs)

Q7: How regularly do you tend to cycle for leisure or sport, e.g. Road cycling, off-road cycling, cycling with friends/family, BMX cycling, mountain biking, etc.?

How regularly do you cycle?



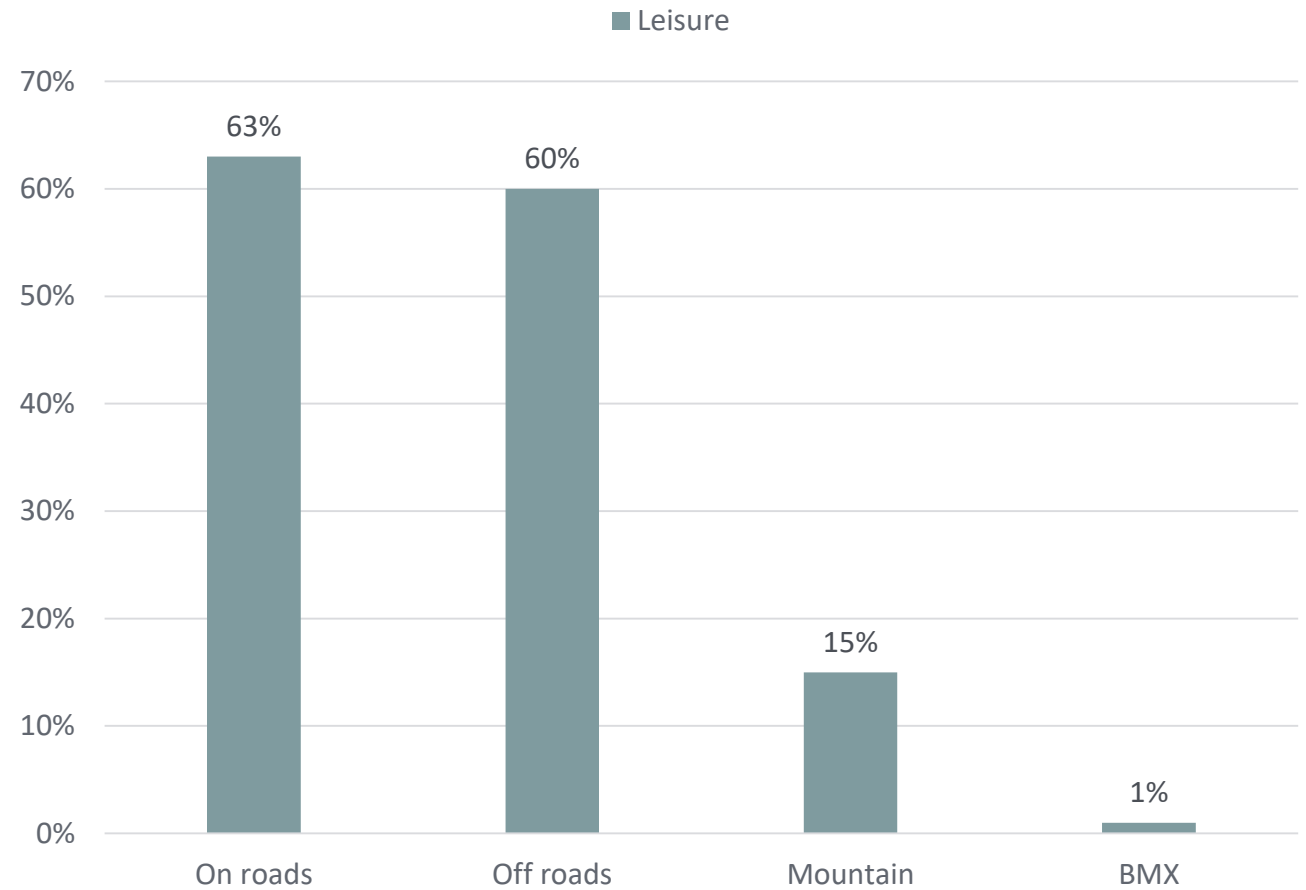
Base (all): 1060

Cycling behaviours

Types of cycling

- Of those who cycle for leisure, most cycle both on roads and off-road.

What types of cycling do you do?



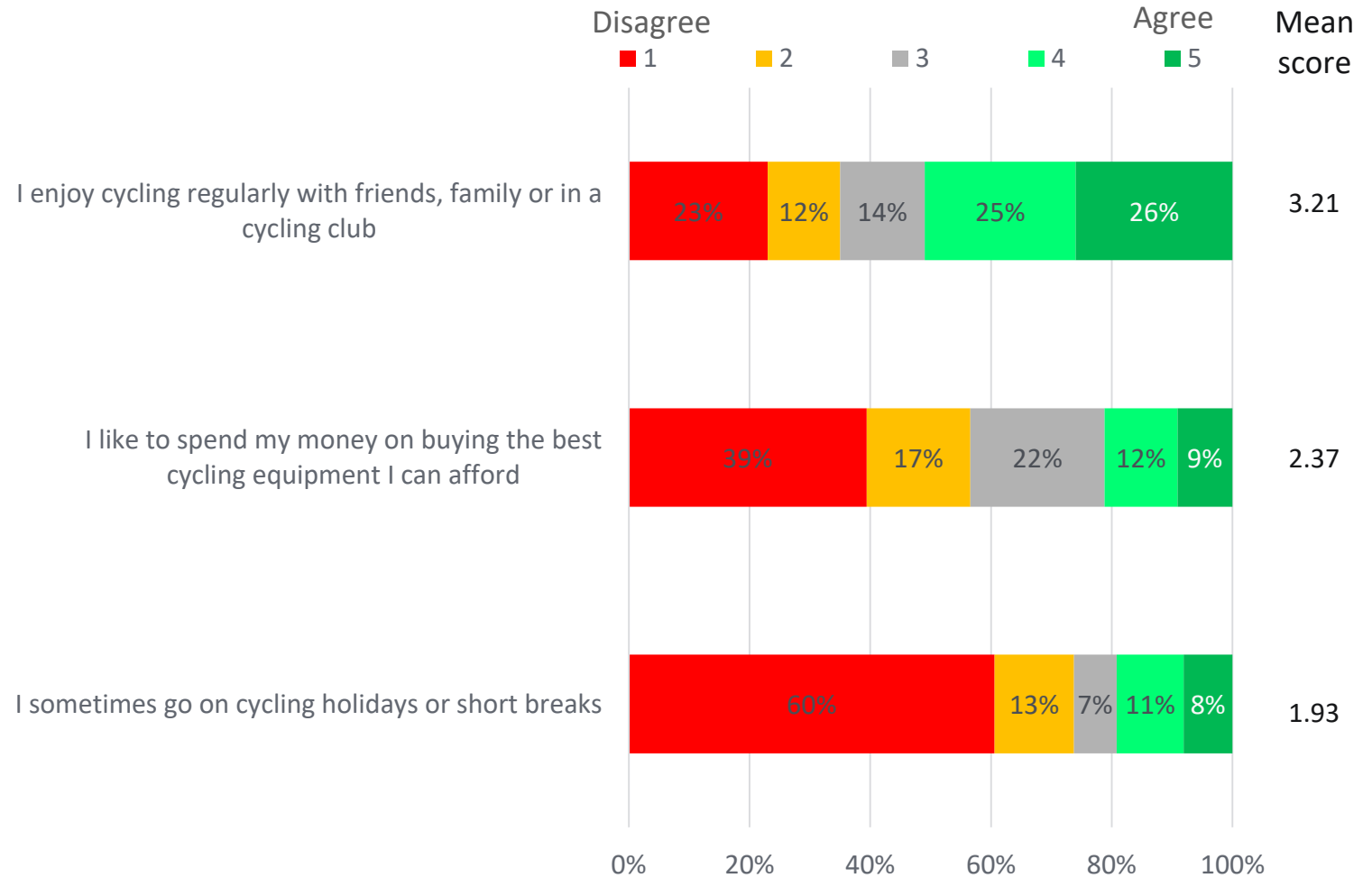
Base (all): 267

Cycling behaviours

Behavioural statements

- Around half of cyclists enjoy cycling regularly with friends, family or in a club – 34% disagree with this statement.
- Around one in five of people who ever cycle are enthusiasts:
 - 22% like to spend their money on the best equipment
 - 19% go on cycling holidays

Agreement / disagreement with statements on cycling



Base (all cyclists): 285

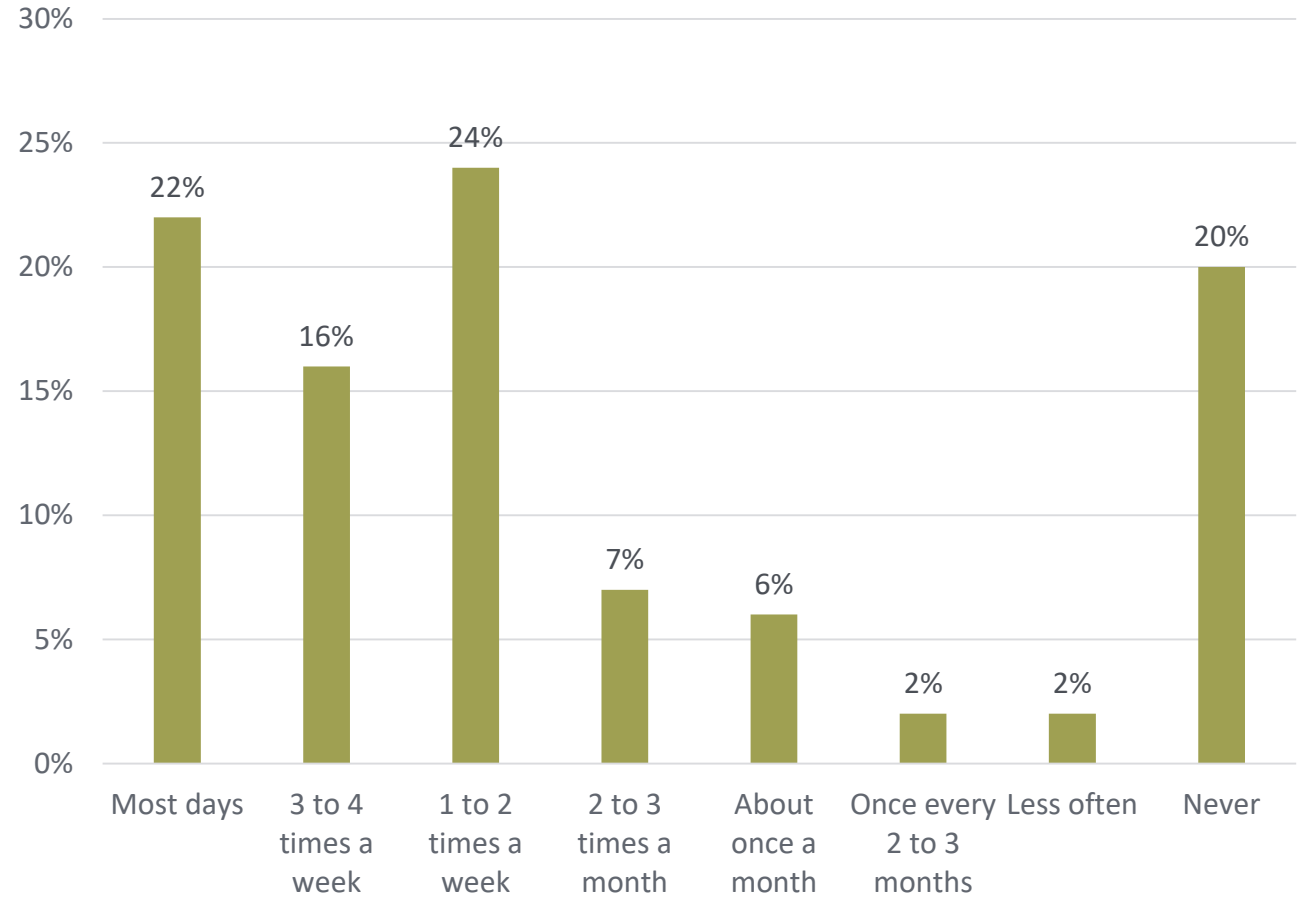
Q9: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Cycling behaviours

Frequency of child cycling

- In contrast to the adult population, 80% of parents of children aged 6 to 15 years old reported that their child (aged 6 to 15 years old) cycles.
- The majority of parents of children in this age group (62%) reported that their child cycles at least once a week.

How often does your child tend to cycle?



Base (all with children aged 6 to 15 yrs): 176

Q18: How often does your child tend to cycle, either for fun or for getting to school, friends' houses, etc.?

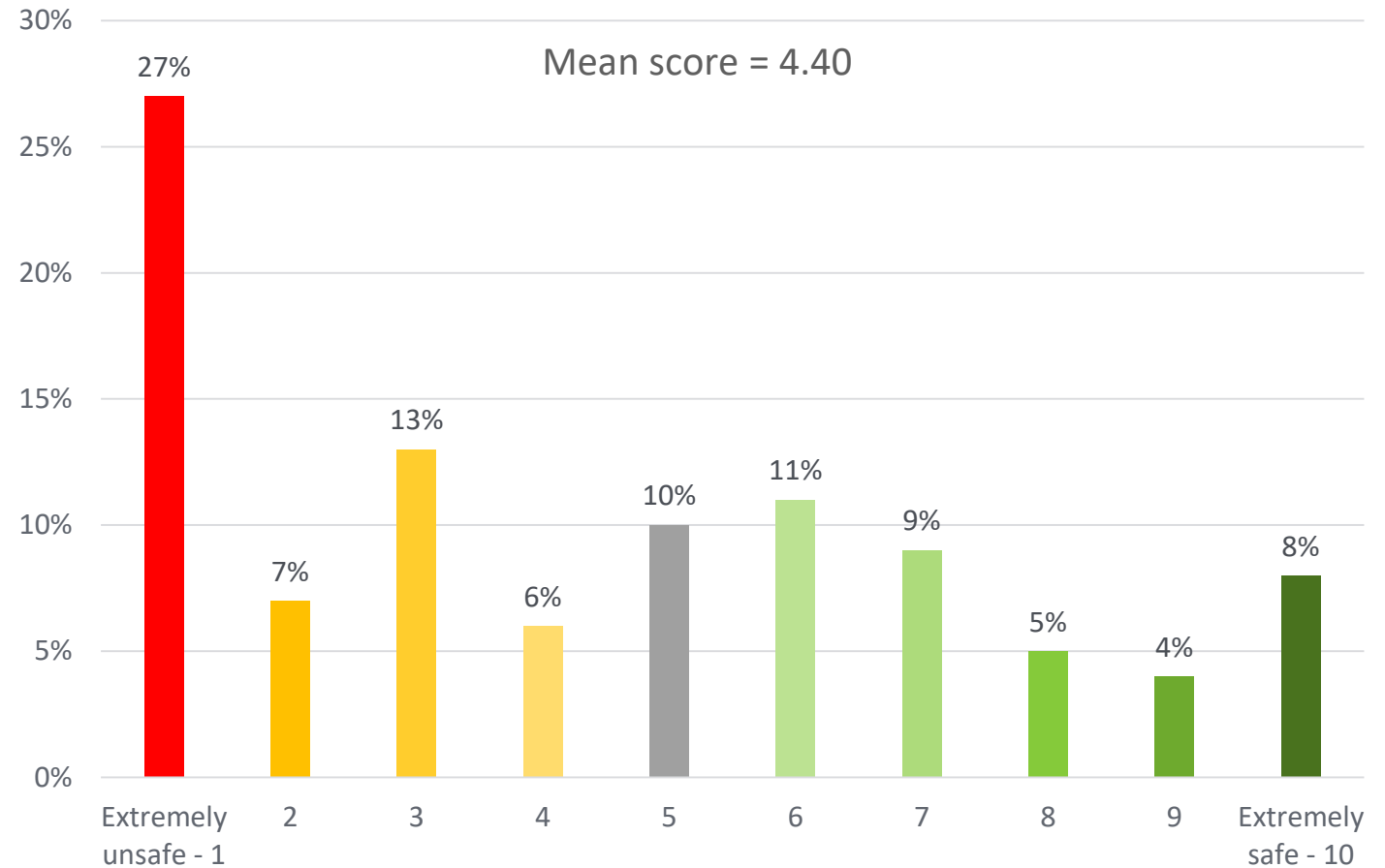
Cycling behaviours

Perceived safety for children cycling

- There was clear concern about children cycling on the roads.
 - 53% rated safety with a score of less than 5
 - 27% gave the lowest possible score of 1 out of 10

Q19: Thinking about your own children, on a scale of 1 to 10, where one is extremely unsafe and 10 is completely safe, how safe do you think it is for children cycling on roads in your local area?

How safe do you think it is for children cycling in your local area?



Base (all with children aged 6 to 15 yrs): 176

Key insights

Cycling behaviours



- Around one quarter of the population cycle at least occasionally – with around 10% cycling weekly.
- The most frequent cyclists are males, higher socio-economic groups and under 55 years old.
- A very high proportion of parents report that their children cycle regularly – however, they do have concerns about road safety.
- Segmentation analysis will reveal more detail and nuance around the profiles of cyclists and non-cyclists.



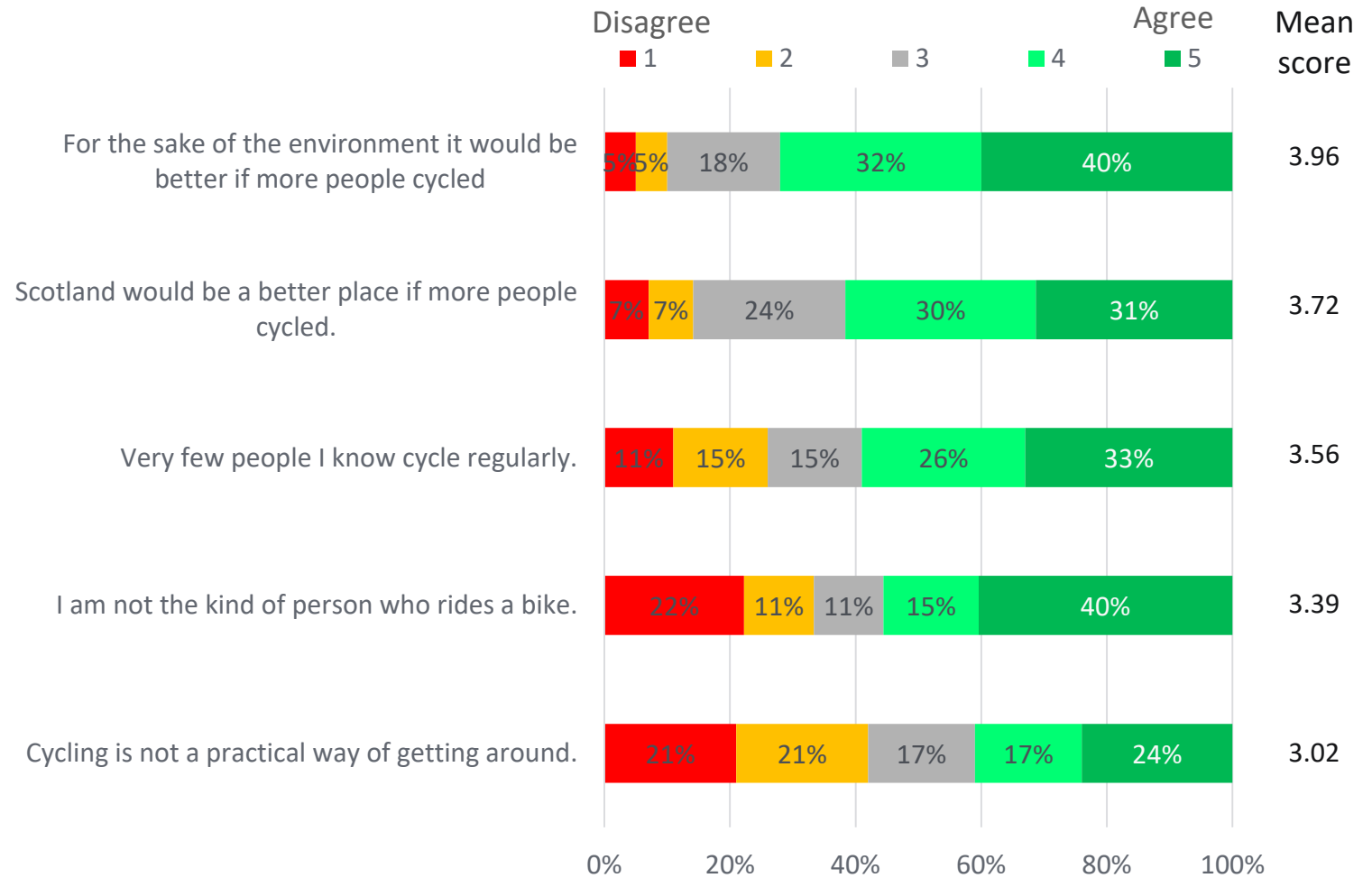
Attitudes to cycling

Attitudes to cycling

- Attitudes towards cycling generally are very positive:
 - 71% agree that, for the sake of the environment, it would be good if more people cycled
 - 62% agreed that Scotland would be a better place if more people cycled
- However, many indicated that cycling was not something that they come across in their life:
 - 60% agreed that very few people they know cycle regularly
 - 55% agreed that they are not the kind of person who rides a bike
- Opinion was split on the practicality of cycling – 41% agreed it's not practical and 42% disagreed.

Q5: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Agreement / disagreement with statements on cycling



Base (all): 1060

Attitudes to cycling

Sub-sample analysis



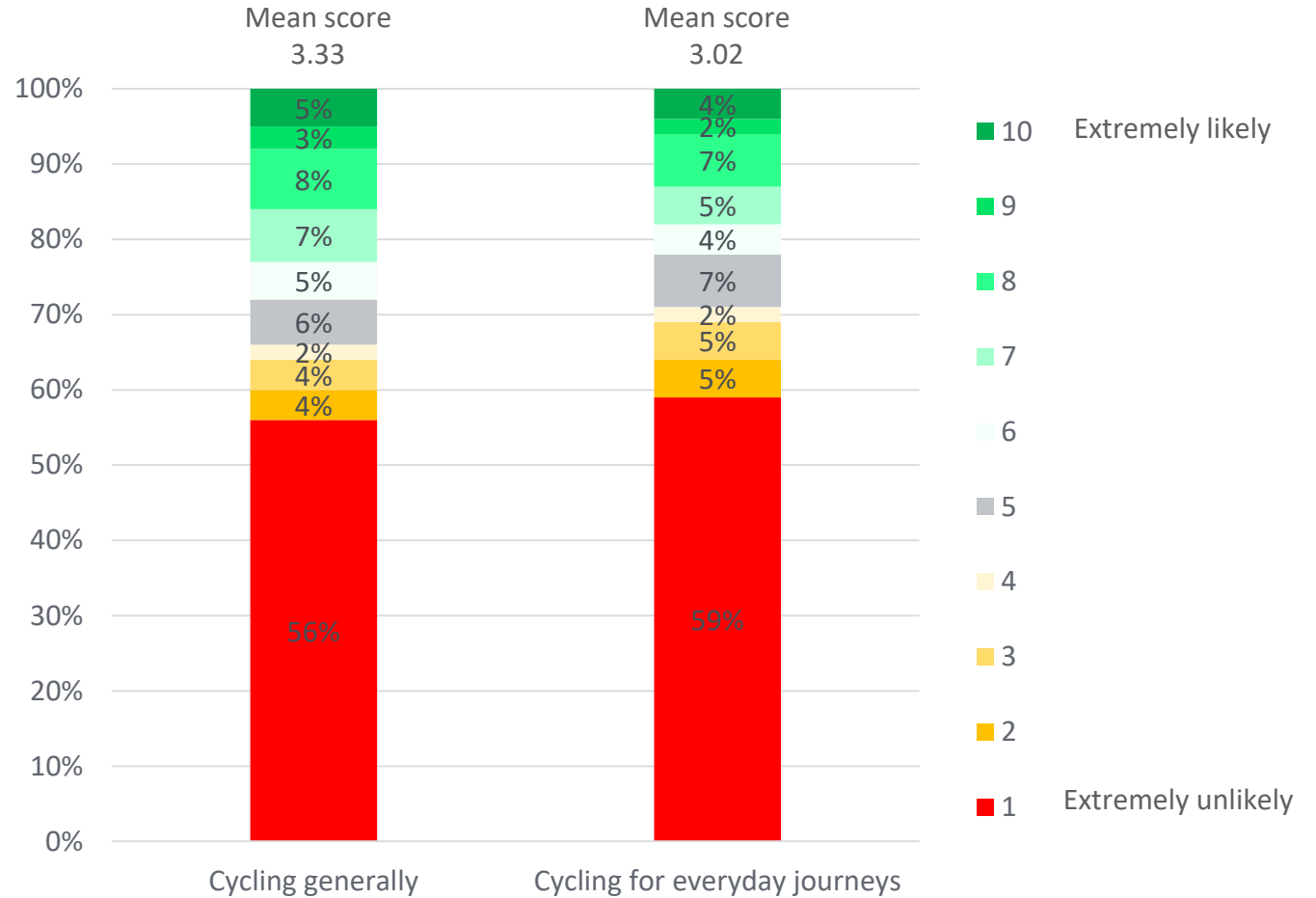
- Females are more likely than males to agree that very few people they know cycle (63%, males 56%) and they are not the kind of person who rides a bike (61%, males 49%).
 - Older respondents (over 55 years) are also more likely to agree with these statements – 66% and 64% respectively
 - Socio-economic group DE is more likely to agree they are not the kind of person who cycles (60%) than ABs (49%).
- As we would expect, cyclists have far more positive attitudes towards cycling in general than non-cyclists.
 - 78% of cyclists agree that Scotland would be a better place if more people cycled. Although fewer non-cyclists agree (55%), the majority still believe Scotland would be better.
 - Similarly, 87% of cyclists agree that it would be better for the environment if more people cycled, compared to 66% of non-cyclists – which is still a significant majority.
- Two thirds of non-cyclists agree that very few people they know cycle regularly (compared to 39% of cyclists) – indicating that social normalising and networks may impact on propensity to cycle.
- Although agreement on whether cycling is practical was divided across the whole sample, cyclists mostly disagree that its not practical (64%), while non-cyclists are more likely to agree (47%).

Attitudes to cycling

Propensity to increase cycling

- 28% of respondents consider it likely (score 6 or more) that they will cycle more generally.
 - 22% consider it likely that they will cycle more for everyday journeys.
- There is a core of almost 60% who consider it extremely unlikely that they will increase their cycling – scoring 1 out of 10.

How likely are you to increase the amount of cycling that you do?



Q10/11: On a scale of 1 to 10, where 1 is extremely unlikely and 10 is extremely likely, how likely are you to:

- increase the amount of cycling you do generally in the next 2-3 years?
- increase the amount of cycling you do for everyday journeys next 2-3 years?

Base (all): 1060

Propensity to cycle more

Sub-sample analysis



- Propensity to cycle more generally is higher amongst the younger age groups, males and ABs.
 - Cycling generally – under 35s (4.27), males (3.61), ABs (3.97)
- Propensity to cycle for everyday journeys was more consistent across demographics, however, under 35s (3.90) were more likely to consider it than older age groups - 35 to 54 (3.18); 55+ (2.07).
- Current cyclists are much more optimistic about increasing cycling than non-cyclists.
 - Cycling generally – cyclists (6.45); non-cyclists (2.19)
 - Cycling for everyday journeys – cyclists (5.61); non-cyclists (2.06)
- Three quarters of non-cyclists gave a score of 1 out of 10 in terms of their likelihood to increase their cycling in the future, both generally and for everyday journeys.

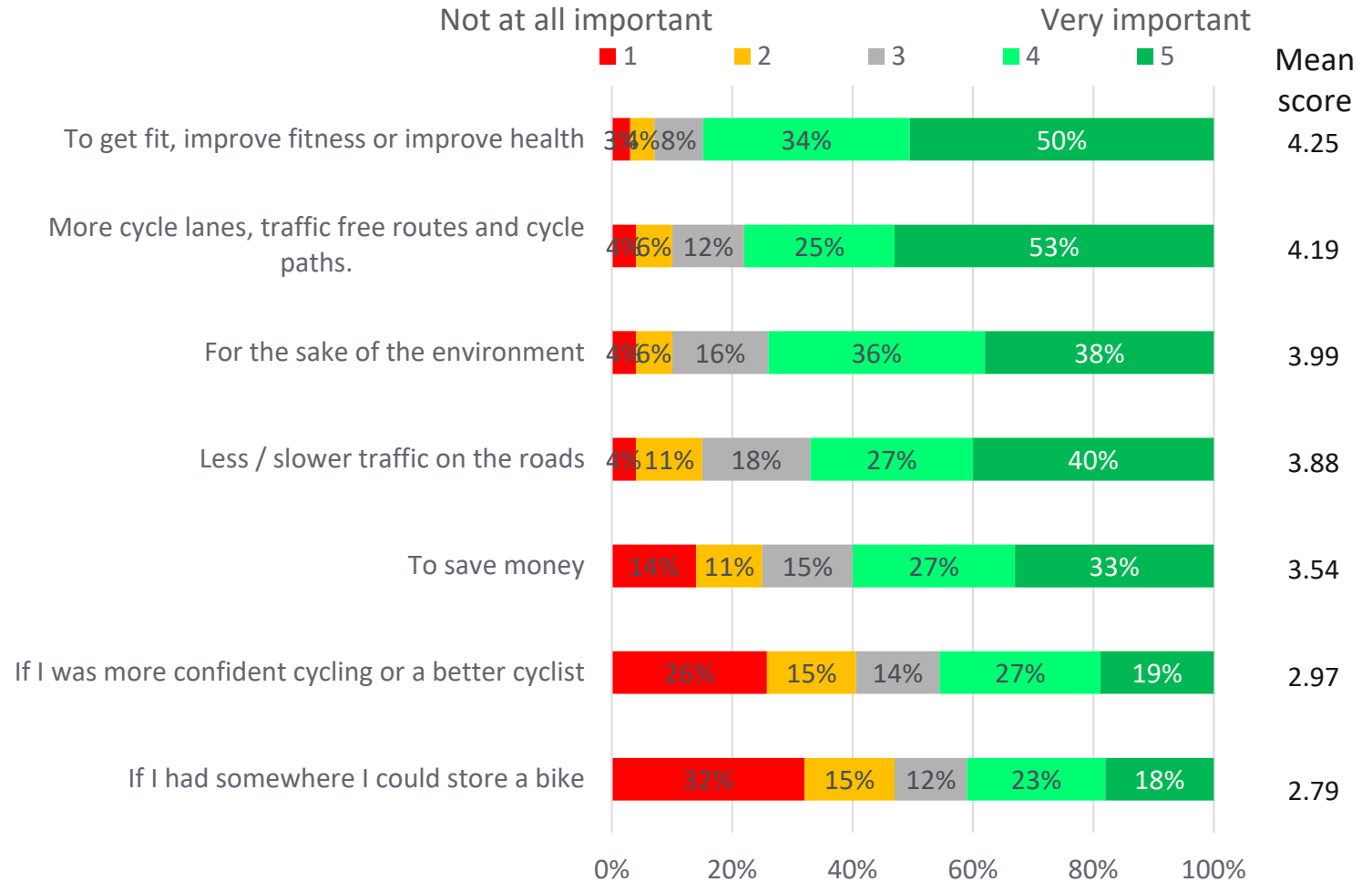
Attitudes to cycling

Motivations to cycle

- Those who scored 3 or more out of 10 for propensity to cycle were asked what would motivate them
- The most important motivating factors to respondents are to improve health, and if there were more cycle lanes/routes.
- More than 70% would also be motivated by environmental concerns, while two thirds would like to see less/slower traffic and 60% would be motivated by the chance to save money.
- Although less significant for the majority of the population, confidence when cycling and bike storage space was important to a significant minority of people.

Q12: I am going to read out a list of factors that some people have said would encourage them to cycle for everyday journeys. For each factor, please tell me how important each statement is or would be to you in encouraging you to cycle more often for everyday journeys.

Importance of motivating factors to cycle for everyday journeys



Base (all who score 3 or more for propensity to cycle – Q10/Q11): 429

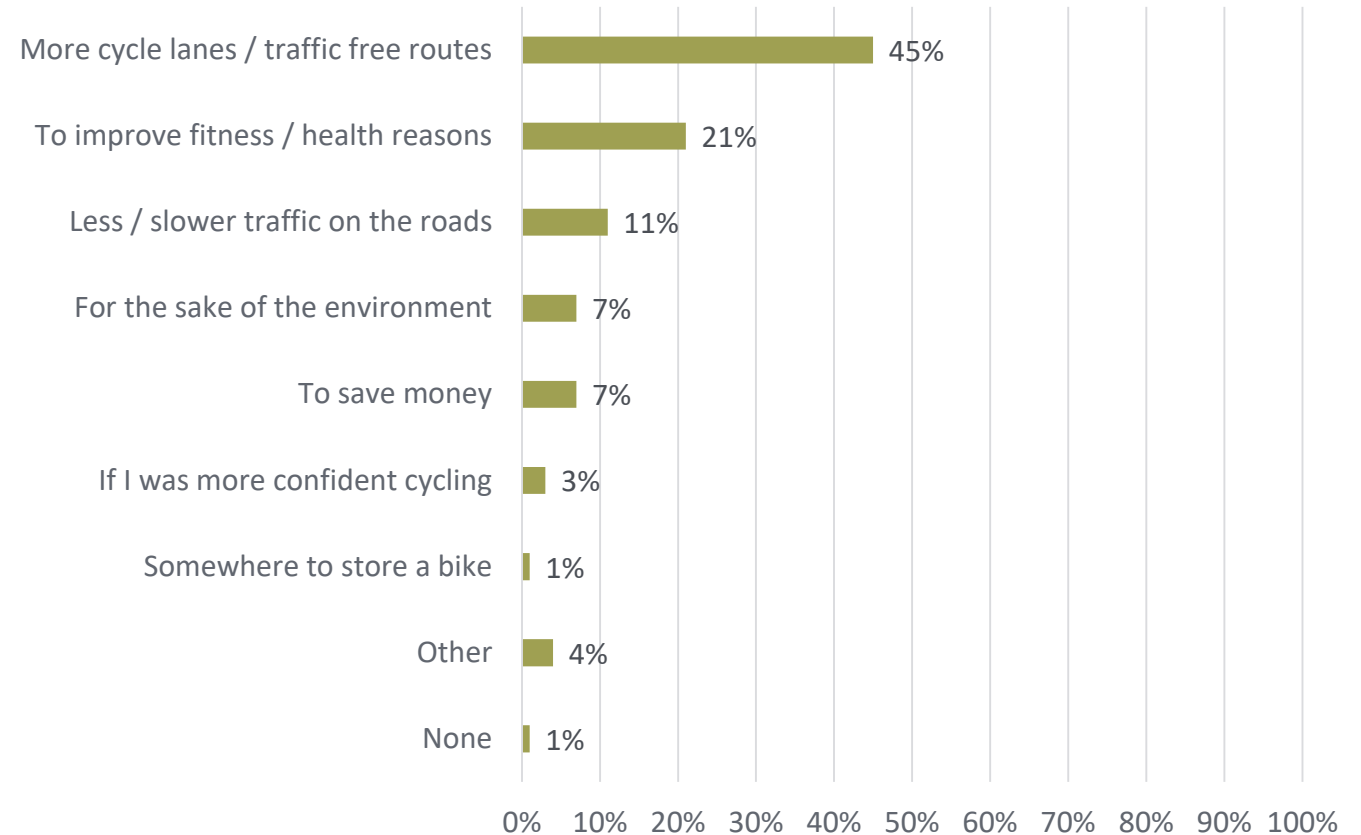
Attitudes to cycling

Key motivation to cycle

- When asked to select one key motivator, cycle lanes and traffic free routes was the most frequently cited.
- One fifth stated health improvement.

Q13: What would be the one main factor that would encourage you to cycle or cycle more often for everyday journeys?

What would be the one main factor that would encourage you to cycle for everyday journeys?



Base (all who score 3 or more for propensity to cycle – Q10/Q11): 429

Motivations to cycle

Sub-sample analysis



- The importance of motivations to cycle are relatively consistent across demographic profile.
 - To save money is more important to DEs (68%) than other groups (ABC1 58%; C2 57%)
 - To save money is also more important to younger respondents (79% of under 25s), compared to other age groups (25 to 44s 62%; 45+ 46%)
 - Females are more likely than males to rate less/slower traffic (75%; 61% males) and 'if I was more confident cycling' (61%; 33% males) as important.
- The order of importance ratings is similar for both cyclists and non-cyclists. Cyclists, however, provided stronger ratings for:
 - To get fit / improve health – cyclists (90%); non-cyclists (77%)
 - More cycle lanes / traffic free routes – cyclists (87%); non-cyclists (67%)
- Non-cyclists are more likely to rate 'if I was more confident cycling' as important (54%) than cyclists (39%).

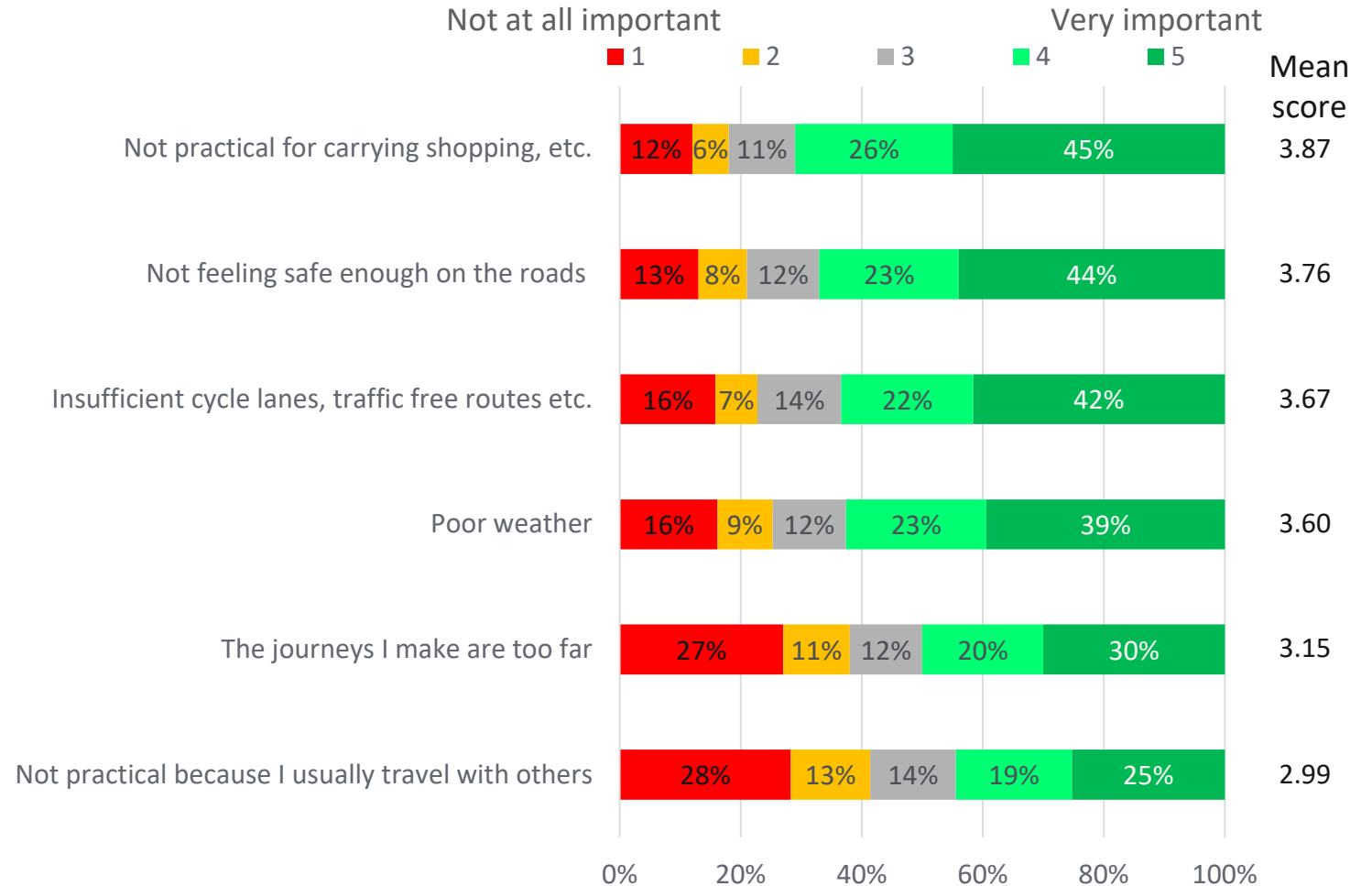
Attitudes to cycling

Barriers to cycling

- All respondents were asked what factors were important in preventing them from cycling more.
- A mix of practical and safety concerns are the key concerns.
- Four barriers to cycling received broadly similar importance ratings:
 - Not practical for carrying things (71% agree)
 - Not feeling safe on roads (67%)
 - Insufficient cycle lanes / traffic free options (64%)
 - Poor weather (63%)
- Significant proportions also agreed with other practical barriers
 - Journeys too far (50%)
 - Need to travel with others (44%)



Importance of barriers to cycling for everyday journeys – most important



Base (all): 1060

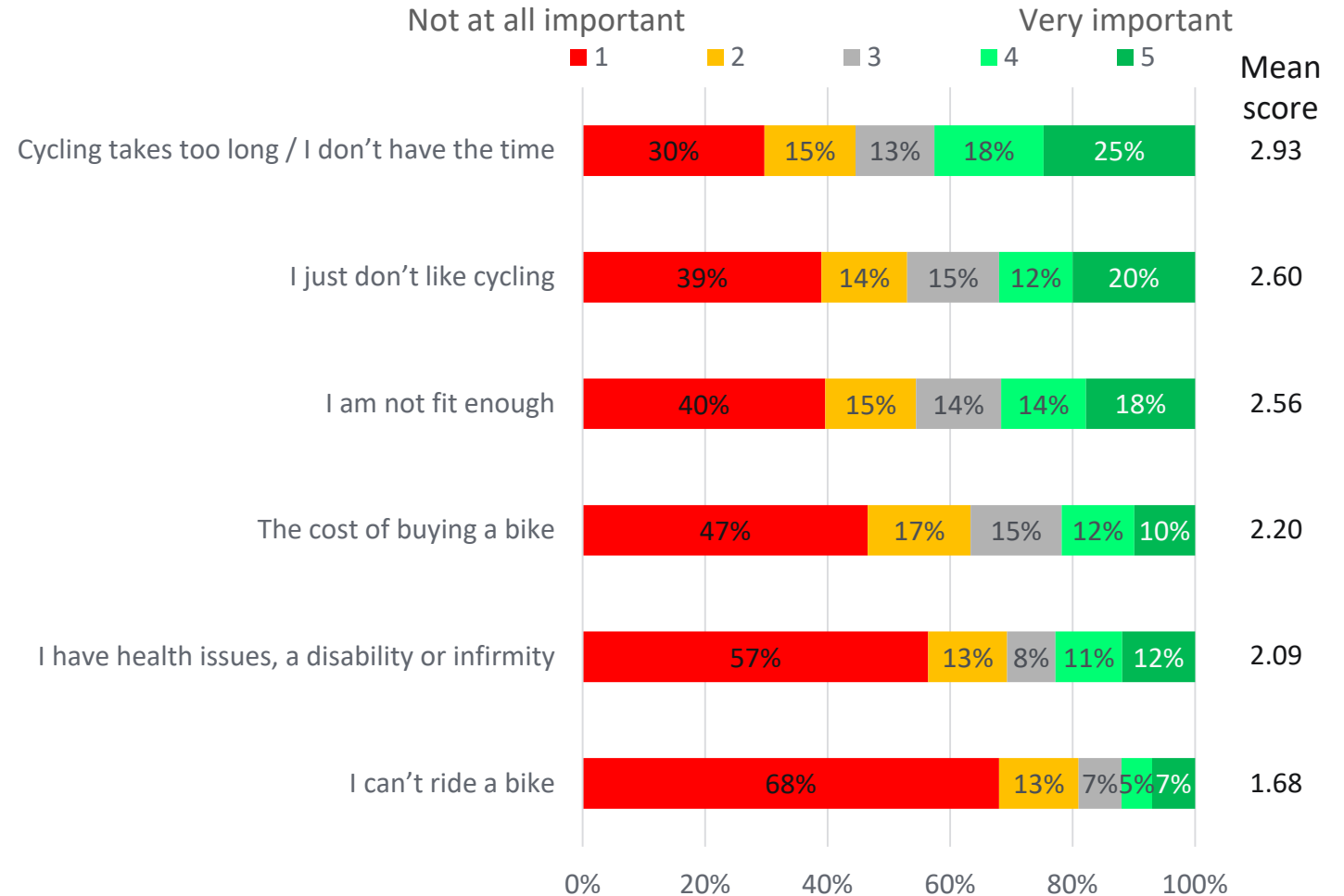
Q14: I am going to read out a list of factors that some people have said puts them off or prevents them from cycling **for everyday journeys**. For each factor, please tell me how important it is to you in preventing you from cycling more for everyday journeys.

Attitudes to cycling

Barriers to cycling

- More personal reasons were less likely to be rated as important.
 - However, these are likely to be significant obstacles to the minority of people who experience them

Importance of barriers to cycling for everyday journeys – least important



Base (all): 1060

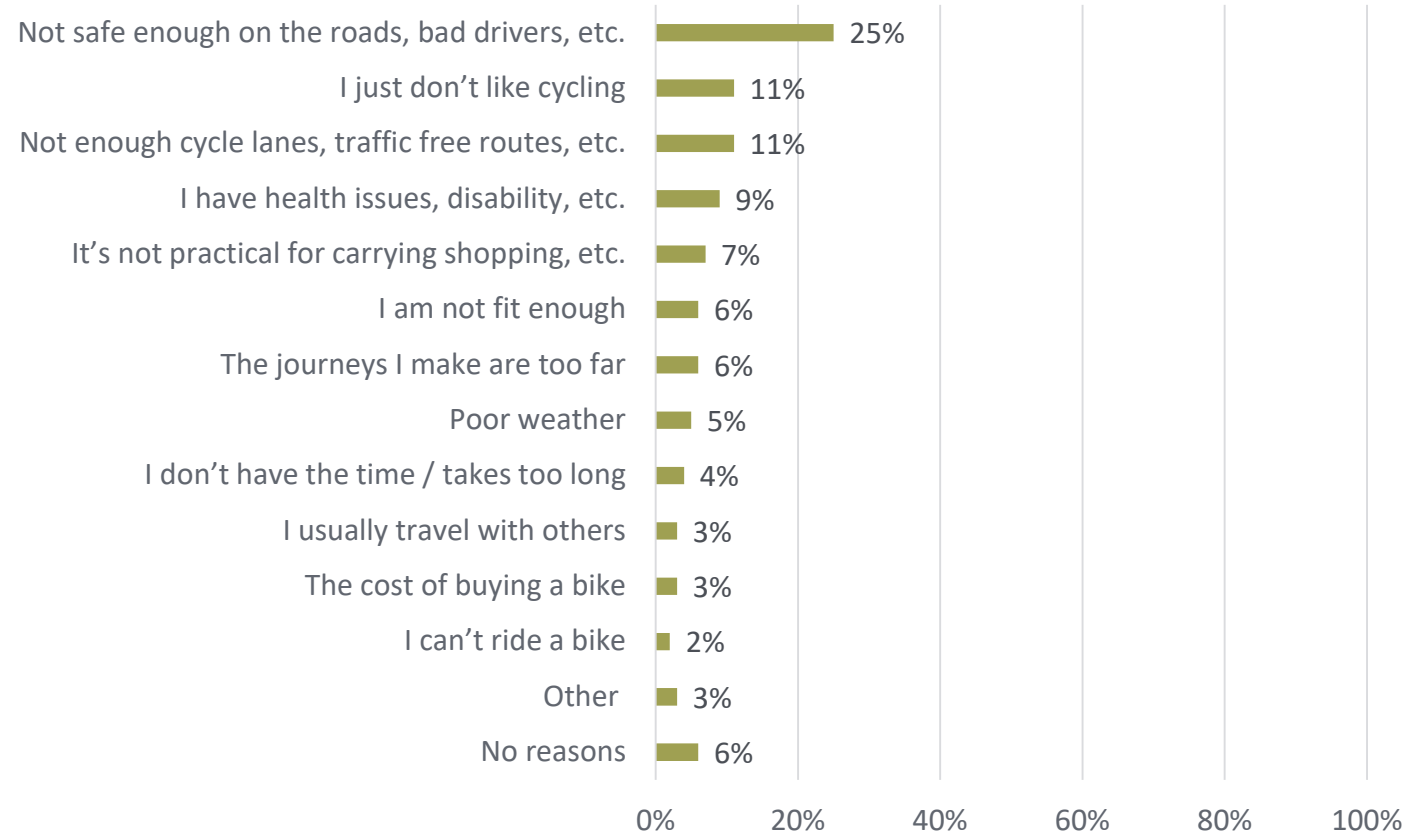
Q14: I am going to read out a list of factors that some people have said puts them off or prevents them from cycling **for everyday journeys**. For each factor, please tell me how important it is to you in preventing you from cycling more for everyday journeys.

Attitudes to cycling

Key barrier to cycling

- Respondents were asked to pick one key barrier that prevents them from cycling more.
- No single barrier stands out as a significant issue for a large proportion of the population.
- The largest response was concern about safety on the roads, but only 1 in 4 cited this as their main concern.
- Findings suggest that a myriad of barriers impact across the population, with concerns being specific to individual circumstances.

What is the one main factor that would discourage you to cycle for everyday journeys?



Q15: What would be the one main reason that you do not cycle / do not cycle more often for everyday journeys?

Base (all): 1060

Barriers to cycling

Sub-sample analysis




- Respondents in the DE groups are more likely than other socio-economic groups to rate as important the cost of buying a bike (33%); health problems (35%); not fit enough (43%); don't like cycling (38%); I can't ride a bike (18%)
- Higher proportions of females rate almost all of the barriers as important than males.
- The key barriers which vary by age are the cost of buying a bike (more important to younger age groups), health issues (more for older age groups), not fit enough (more for older age groups) and I can't ride a bike (more for older age groups).
- Cyclists and non-cyclists tend to have a similar prioritisation of barriers, although higher proportions of non-cyclists tend to rate each barrier as important.
- The only barrier rated as important by more cyclists than non-cyclists is insufficient cycle lanes and traffic free routes – cyclists 74% important; non-cyclists 60% important.
- The biggest differences in importance ratings between cyclists and non-cyclists are for:
 - I just don't like cycling – non-cyclists 42% important; cyclists 7% important
 - I am not fit enough – non-cyclists 40% important; cyclists 11% important
 - Cycling takes too long – non-cyclists 48% important; cyclists 28% important
- When asked to name the key barrier, both cyclists and non-cyclists were most likely to select concern about safety on roads (cyclists 29%; non-cyclists 24%)
 - Other barriers selected tended to focus on infrastructure and practicalities for cyclists - not enough cycle lanes (22%), journeys too far (10%) and poor weather (9%)
 - For non-cyclists, other barriers tended to be personal – don't like cycling (15%), health issues (11%), not fit enough (9%)

Key insights

Attitudes to cycling



- The majority of people agree that cycling is good for Scotland and the environment.
- However, on a personal level resistance to increasing cycling is fairly entrenched.
- For many cycling is not prevalent in their social group or they just can't see themselves as cyclists – especially females, lower SEG and older respondents.
- Those who do not completely reject cycling more in the future, are most likely to be motivated by better cycling infrastructure and the opportunity to improve their health.
- A far wider range of barriers is evident – importance varies widely by sub-groups.
- Not feeling safe on the road is the most often cited as the main barrier to cycling.

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Impact of life events on transport choices

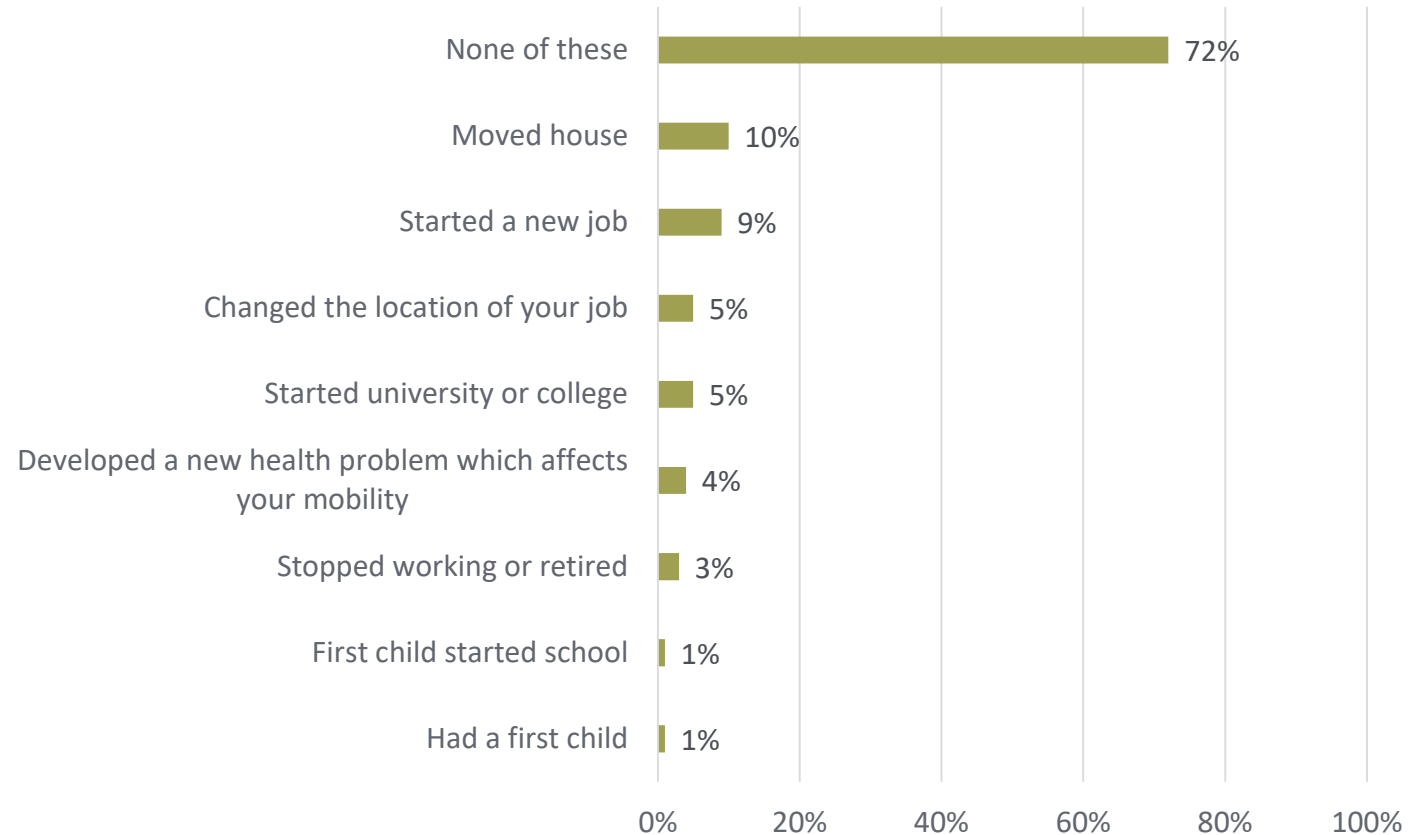
Life events

Experience of life events

- 28% of respondents had experienced a significant life event in the last year.
 - Most commonly moved house or started a new job.
- Under 35 year olds are more likely to have experienced life events (48%) than 35 to 54 (21%) and 55+ (18%).
- Those in socio-economic group C1 were also more likely to have experienced a change in circumstances (35%).

Q20: Have you experienced any of the following life events in the last 12 months?

Have you experienced any of these events in the last year?



Base (all): 1060

Life events

Impact on transport choices

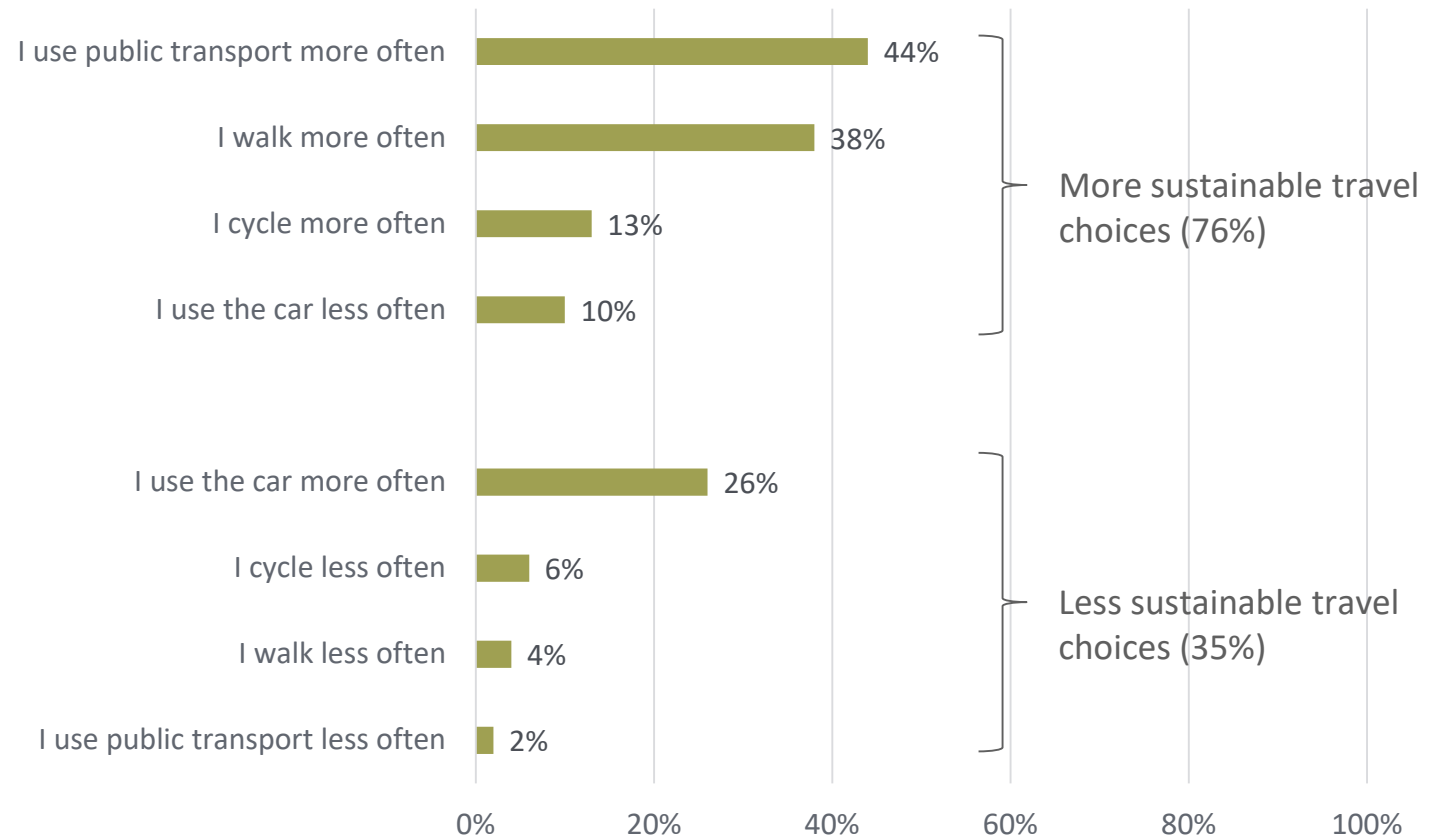
- 36% of those who experienced an event stated that it has an impact on transport choices.
- In total, 76% made a move towards more sustainable travel options
 - Mostly using public transport and walking more
 - 13% cycle now more often
- 35% moved to less sustainable options – tending to use the car more often
- As this question allowed more than one response, some people stated both more and less sustainable transport choices.

Q21 Did this event cause you to re-think or change the type of transport you use for travel for everyday journeys?
 Q22: In what way did your transport choices change?



Did this cause you to change the type of transport you use?

36% of those who experienced a life event stated that impacted on their transport choices.



Base (all who experienced a life event and changed transport choices): 108

Key insights

Impact of life events



- Changes in life circumstances often prompts people to re-evaluate their transport choices.
- This means that there is an opportunity to encourage more active travel choices.
- Most often people switch to more active or sustainable options.
- People in younger age groups and the C1 socio-economic group are the most likely to experience changes in circumstance – especially new jobs, moving home and starting university or college.

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Influence of people and events on propensity to cycle

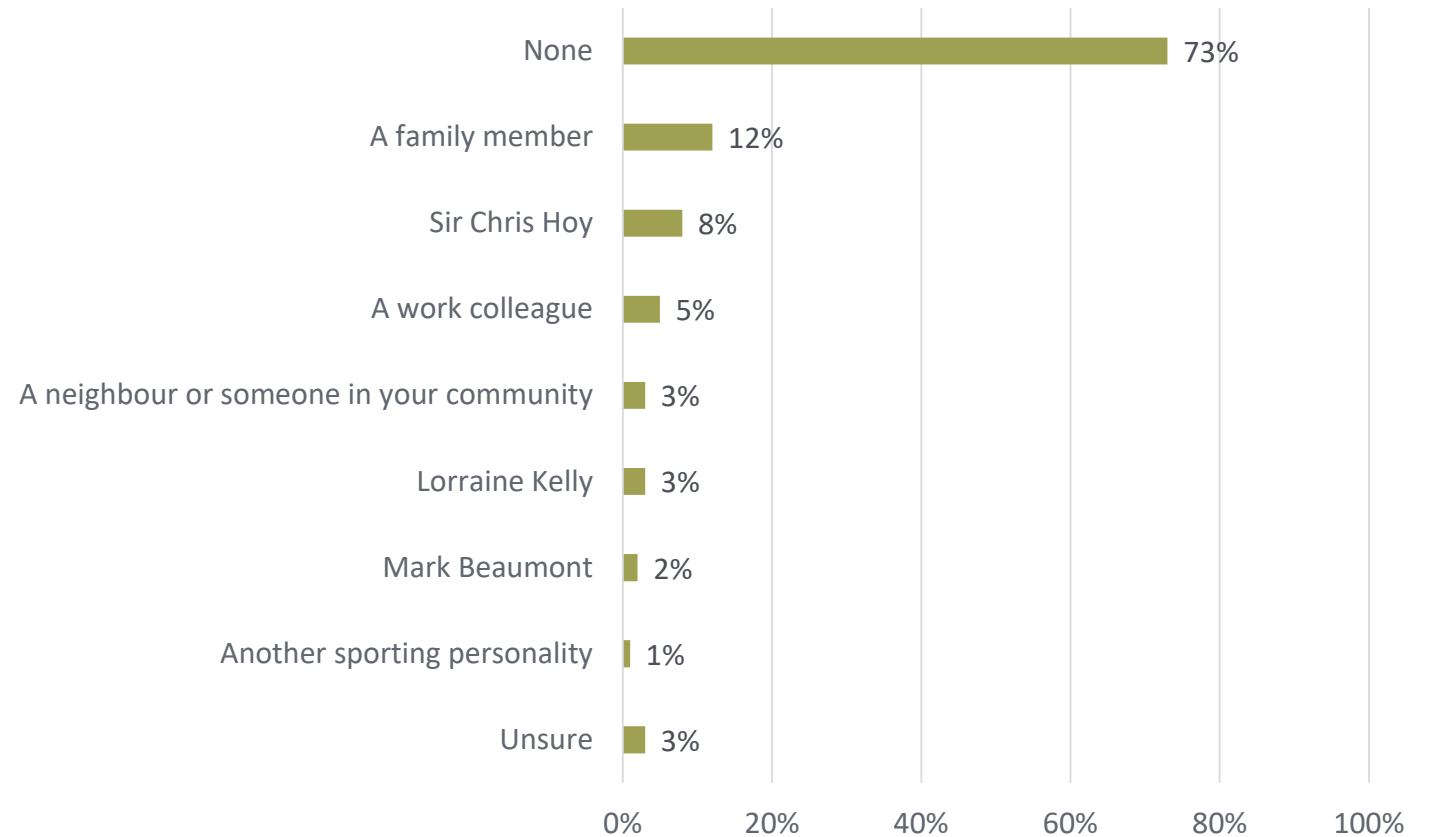
Influence of people and events

Influence of people

- 27% of respondents stated that they might be encouraged to cycle more often by the endorsement of a celebrity or friend / relative.
- Family members are the most influential.
- The most encouraging celebrity would be Sir Chris Hoy.

Q23: Which of the following people would be likely to encourage you to take up cycling or cycle more often if they were to promote cycling?

Which of the following people would encourage you to cycle?



Base (all): 1060

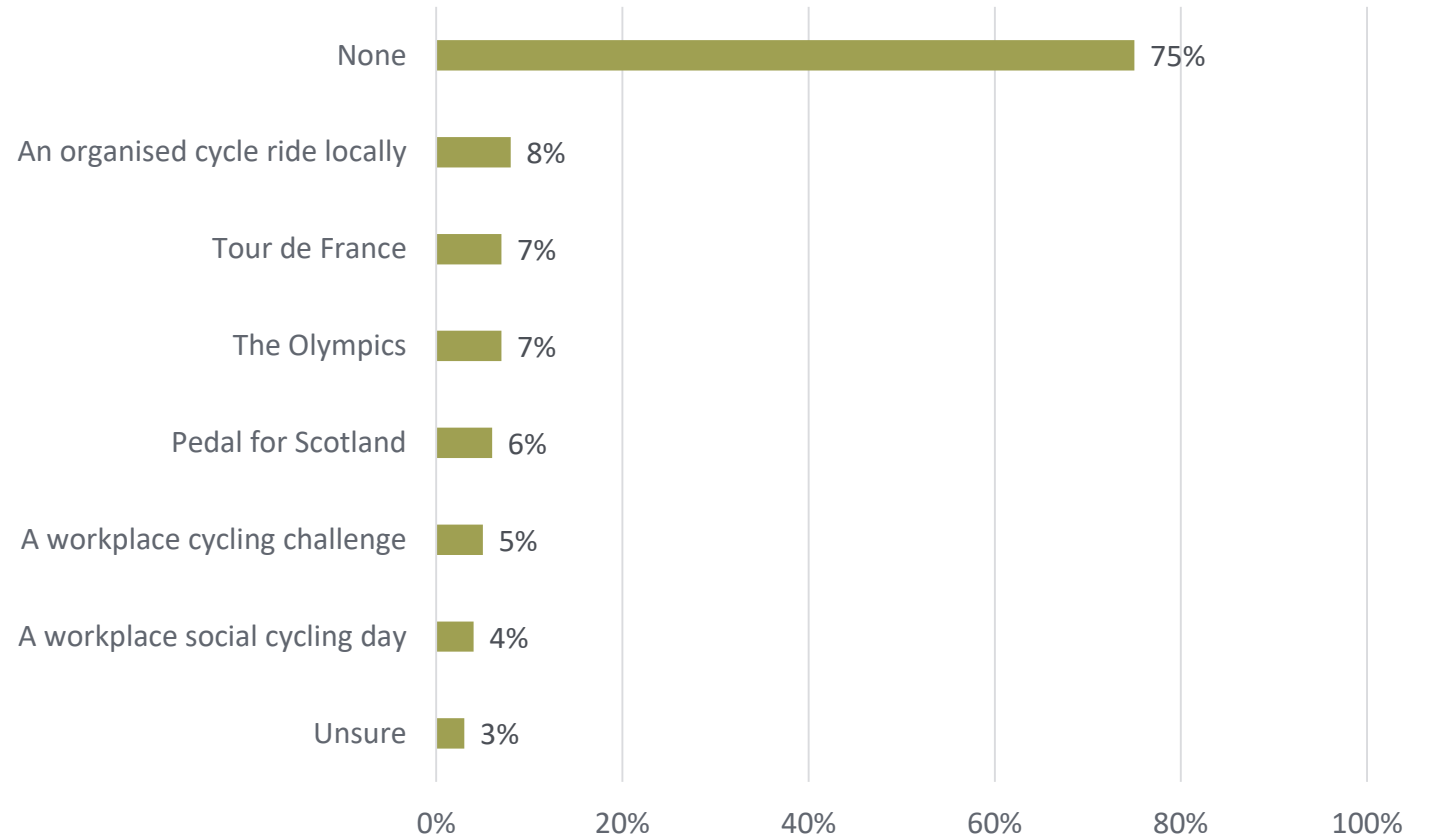
Influence of people and events

Influence of events

- Around one quarter of respondents stated they could be influenced by an event.
- No single event or type of event stood out – a local event, Tour do France, The Olympics and PFS were all selected by similar proportions of the sample.

Q24: Which of the following events would be likely to encourage you to take up cycling or cycle more often?

Which of the following events would encourage you to cycle?



Base (all): 1060



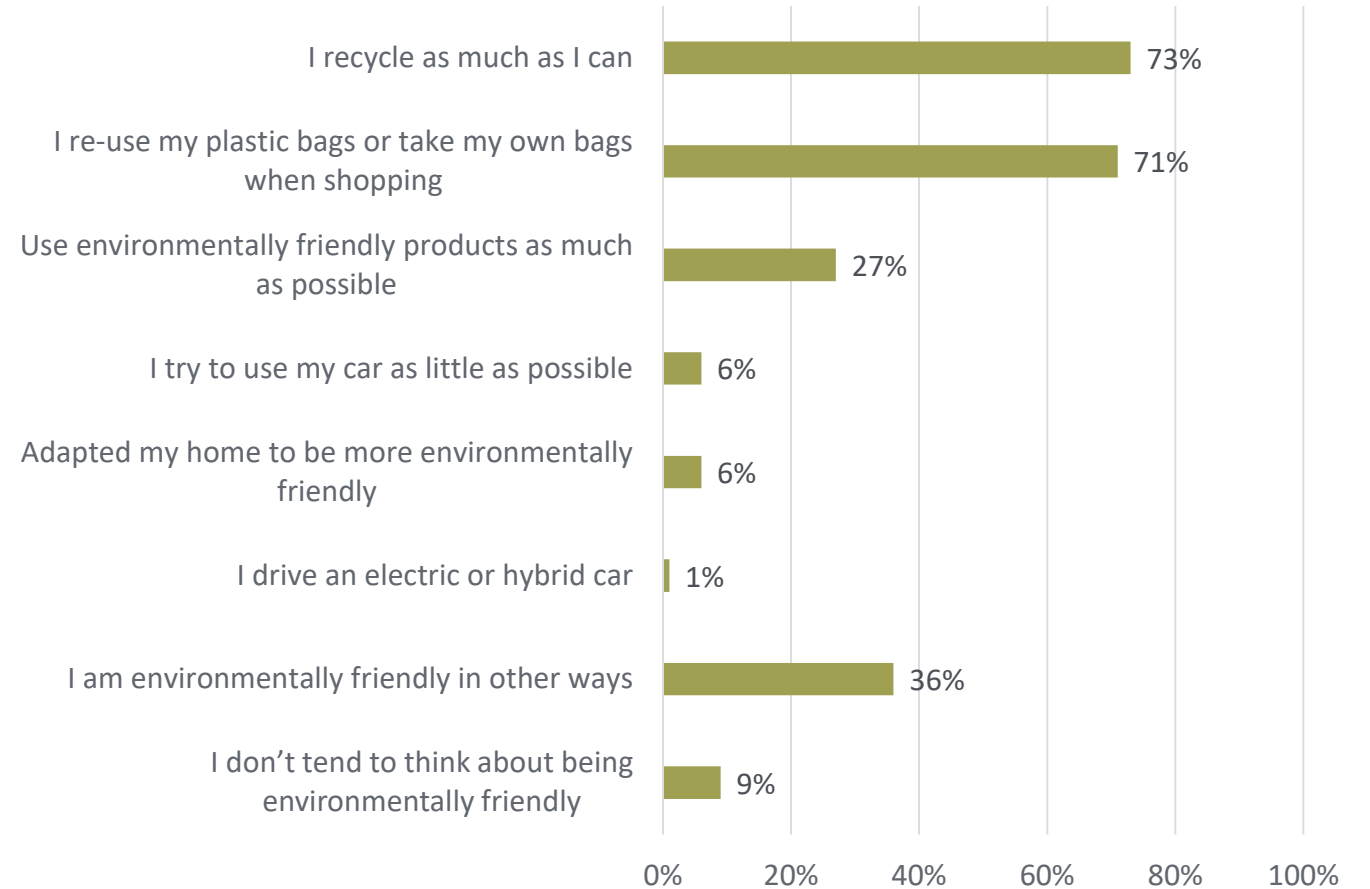
Attitudes to environment

Attitudes to the environment

- The majority of respondents claim to try to act in an environmentally friendly way.
- Most recycle as much as they can and re-use plastic bags when shopping.
- Over one quarter also use environmentally friendly products.
- Females and over 35 year olds tend to be more environmentally conscious than males and younger respondents.
- Respondents in the ABC1 socio-economic groups are more likely to act in an environmentally friendly way than C2DE groups.

Q25: Which of the following applies to you?

Environmentally conscious behaviour



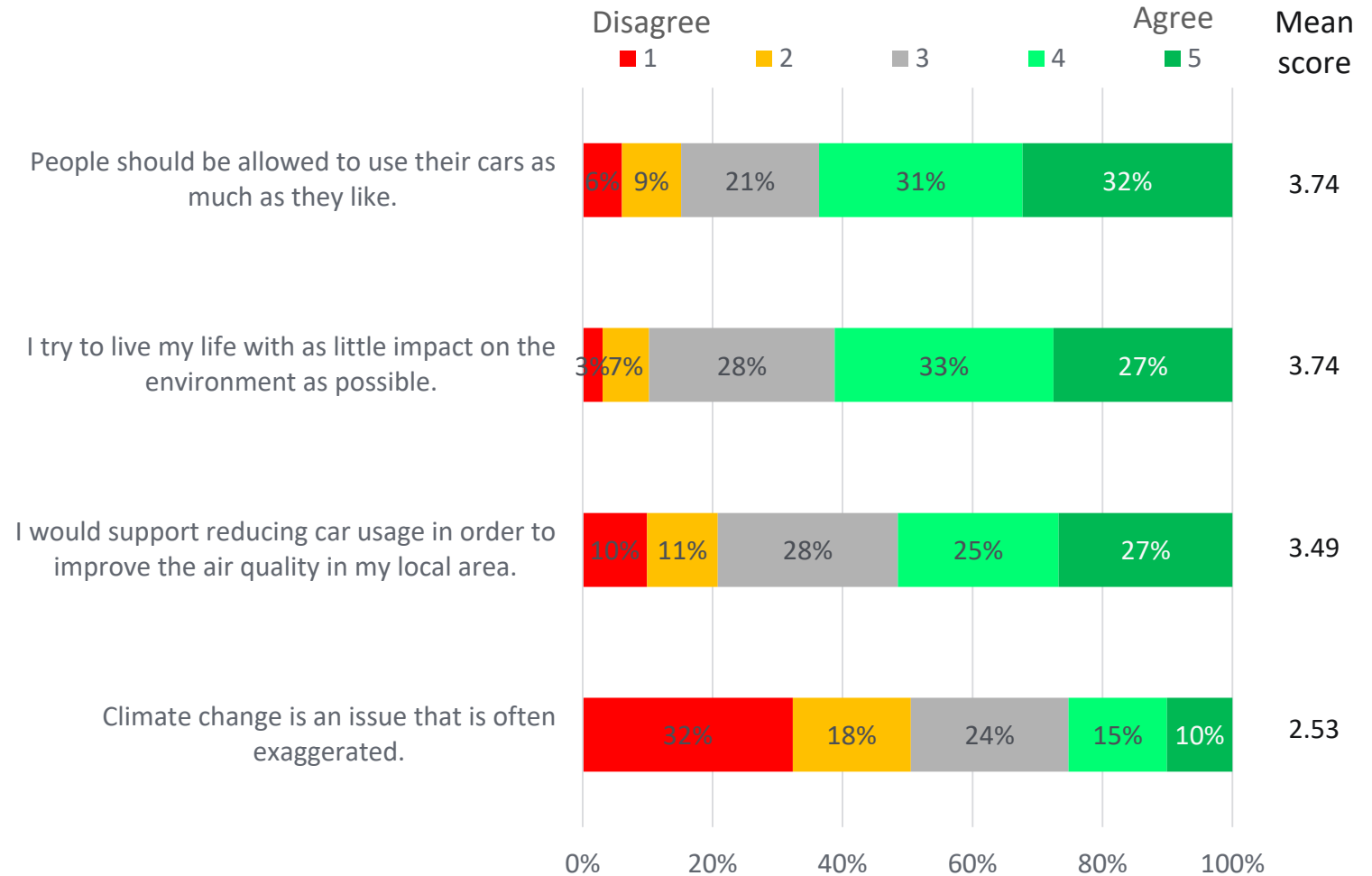
Base (all): 1060

Attitudes to the environment

- 61% of people claim that they try to live their life with as little impact on the environment as possible.
 - 52% would also support reducing car usage in order to improve air quality.
- However, only 16% disagree that people should be allowed to use their cars as much as they like.
- Half the sample disagree that climate change is exaggerated – but 25% agree that it is.

Q6: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Agreement / disagreement with statements on the environment



Base (all): 1060

Attitudes to the environment

Sub-sample analysis



- Cyclists tend to be more concerned about environmental issues than non-cyclists.
 - 68% agree that they try to live with as little impact on the environment as possible, compared to 58% of non-cyclists.
 - 66% agree that they would support reducing car usage, compared to 47% of non-cyclists.
- Non-drivers are only slightly more likely to agree that they would support reducing car usage (55% agree) than drivers (49% agree).
 - Amongst drivers, 73% agree that they should be allowed to use their car as much as they like.
- There were very few differences in attitudes across the demographic profile:
 - Respondents within the AB socio-economic group are the most likely to disagree that climate change is exaggerated (60%).
 - Females (54%) are more likely than males (46%) to disagree with this statement



Segmentation analysis

Segmentation analysis

Method



- Initially, key questions from the survey were entered into factor and clustering modelling software in order to determine whether statistical clustering in the data would reveal relevant and useable segments.
- This approach identified seven clusters (segments), however, these were not deemed to be of value as the solution only described 60% of the data, and clustered all cyclists into one segment.
- A segmentation model was therefore developed based on key questions being combined in a derived variable. The questions used were:
 - Q1d – frequency of cycling for transport
 - Q7 – frequency of cycling for leisure
 - Q10 – propensity to cycle more in the future generally
 - Q15 – main reason for not cycling more
- Using these questions a segmentation model was developed which included nine segments.

Segmentation analysis

Defining characteristics



Segment	Defining characteristics	% of sample
Cycling Enthusiasts	Cycle for transport or leisure <u>at least 2</u> or 3 times a month	17%
General Cyclists	Cycle for transport or leisure <u>less than 2</u> or 3 times a month	10%
Eager Non-cyclists	Currently never cycle, but <u>high propensity</u> to cycle in next 5 years	9%
Warm Non-cyclists	Currently never cycle, with <u>moderate propensity</u> to cycle in next 5 years	7%
Safety Conscious Rejecters	Currently never cycle, no intention to cycle in next 5 years, safety concerns are the main reason	16%
Health and fitness-based Rejecters	Currently never cycle, no intention to cycle in next 5 years, health is the main reason	13%
Uninterested Rejecters	Currently never cycle, no intention to cycle in next 5 years, just don't like cycling	11%
Practical Rejecters	Currently never cycle, no intention to cycle in next 5 years, practical issues are the main reason	10%
Other Rejecters	Currently never cycle, no intention to cycle in next 5 years for a variety of reasons	7%

Base (all): 1060

Segmentation analysis

Cycling Enthusiasts (17%)



- 78% cycle for transport (58% at least once a week); 98% cycle for leisure (69% at least once a week)
- Mostly males (69%)
- Skewed to younger age groups – 42% under 35; 39% 35 to 54 years
- 52% work full time
- Skewed to AB social grades – 32%
- Many are drivers (62%) - 56% drive at least once a week
- Those who cycle for transport do so mainly for health benefits (71%), but also for convenience, cost and less stress - most often for local journeys
- Those that also drive like the convenience and freedom of their car – however, many (63%) would like to use their car less for the sake of the environment
- Positive attitudes to cycling – especially Scotland would be a better place and the environment would benefit if more people cycled
- Positive agreement with environmental questions and more likely than average to adopt environmentally friendly measures into their lives
- More cycling infrastructure would be the key to motivating them to cycle more for everyday journeys; many also rate getting fit as an important motivation
- Concerns about safety and a lack of cycling infrastructure are the main barriers to cycling more often for journeys.



Segmentation analysis

General Cyclists (10%)



- 60% cycle for transport (10% about once a month; 50% less than once a month)
- 86% cycle for leisure (26% about once a month; 60% less than once a month)
- Almost equally split between males (52%) and females (48%)
- Skewed to younger age groups – 44% under 35; 42% 35 to 54 years
- 59% work full time
- Skewed to ABC1 social grades – 68%
- Higher than average have dependant children (35%)
- Less active travellers – overall 69% drive, with 53% driving most days for transport
- Those that drive like the convenience (67%) and journey time (42%)
- 70% would rather use their car than any other form of transport, however, half would like to use their car less for the sake of the environment
- Positive attitudes to cycling – especially Scotland would be a better place and the environment would benefit if more people cycled
- Positive agreement with environmental questions and more likely than average to adopt environmentally friendly measures into their lives
- 58% score 6 to 10 on propensity to cycle more in the future generally; 38% score 6 to 10 for cycling more for everyday journeys
- Similar to Cycling Enthusiasts, more cycling infrastructure would be the key to motivating them to cycle more for everyday journeys; many also rate getting fit as an important motivation
- Concerns about a lack of cycling infrastructure (77%), safety (70%), carrying luggage (65%) and poor weather (62%) are the main barriers rated as important



Segmentation analysis

Eager non-cyclists (9%)



- All currently never cycle for transport or leisure
- However, all score 6 to 10 in terms of propensity to take up cycling in general
- 81% score 6 to 10 for propensity to take up cycling for everyday journeys
- Almost perfectly split between males (49%) and females (51%)
- Skewed to younger age groups – 43% under 35; 16% 36 to 54 years
- 59% work full-time or part-time
- Skewed towards the lower DE social grades – 37%
- 44% are car drivers – lower than average (54%)
- 59% of those who are car drivers would like to use their car less for the sake of the environment
- Positive attitudes to cycling - 79% agree that Scotland would be a better place and 82% agree it would be good for the environment if more people cycled
- Getting fit (83%), more cycling infrastructure (72%), less/slower traffic (68%), and saving money (66%) would be key to motivating them to cycle more for everyday journeys.
- Concerns about a lack of cycling infrastructure (72%), the impracticality of cycling when carrying goods (69%), and safety (63%) are the main barriers to cycling more often for journeys.
- Although this groups is skewed towards the lower social grades, only 28% highlighted the cost of buying a bike as a main barrier to cycling.



Segmentation analysis

Warm Non-cyclists (7%)



- All currently never cycle for transport or leisure
- However, all score 3 to 5 in terms of propensity to take up cycling in general
- 82% score 3 to 5 for propensity to take up cycling for everyday journeys
- Slightly more females (53%) than males (47%)
- Skewed to younger age groups – 49% under 35; 22% 35 to 44 years
- 56% work full-time or part-time, and 20% are students
- Skewed towards the C1 social group – 37%, and relatively consistent across the other social groups: AB (21%), C2 (20%), and DE (22%)
- 46% are car drivers – lower than average (54%)
- Higher than average train passengers – 37% use train at least once a month (9% most days), compared to 23% average
- Many are relatively active travellers – 46% walking to destinations most days
- Positive attitudes to cycling – majority believe Scotland would be a better place (64%) and the environment would benefit (80%) if more people cycled
- Positive agreement with environmental statements
- Increasing fitness (72%) and more cycle lanes (63%) were the most important factors in motivating this group to cycle more
- Concerns about the impracticality of cycling for carrying goods (71%) and safety (70%) were the main barriers to cycling



Segmentation analysis

Safety Conscious Rejecters (16%)



- All currently never cycle for transport or leisure
- All score 1 or 2 out of 10 in terms of propensity to cycle in next 5 years generally or for everyday journeys
- More females (59%) than males (41%)
- Skewed to older age groups – 24% over 65 years; 41% 45 to 64 years
- 40% working full-time and 25% retired
- Concentrated between the C1 (30%) and C2 (26%) social groups
- Active travellers – 88% walk to destinations at least once a week (60% walk every day)
- 53% are car drivers – similar to total sample average (54%)
- Majority of car drivers would rather use the car than any other form of transportation (76%)
- Neutral attitudes to cycling – only 53% believe that Scotland would be a better place if more people cycled
- However, 71% believe that having more people cycling would benefit the environment
- Higher than average proportions agree that they are not the type of person who cycles (74%) and few people they know cycle (68%)
- Unsurprisingly, more cycling infrastructure and less traffic are the key factor in motivating them to cycle.
- Concerns about safety and a lack of cycling infrastructure are the main barriers to cycling more often for journeys.



Segmentation analysis

Health and fitness-based Rejecters (13%)



- All currently never cycle for transport or leisure
- All score 1 or 2 out of 10 in terms of propensity to cycle in next 5 years generally or for everyday journeys
- Almost a perfect split between males (49%) and females (51%)
- Skewed to older age groups – 54% over 65 years; 30% 45 to 64 years
- 59% retired
- Skewed to lowest social group DE - 45%
- Only 7% have dependant children
- Majority of this group (62%) travels by bus at least once a week
- Low incidence of car drivers – 32%
- 70% of car drivers say that they would not consider reducing their use of car for transportation and 75% say that they would rather use the car than any other form of transport
- Positive attitudes to cycling – 62% believe that Scotland would be a better place if more people cycled and 67% stated that it would be beneficial for the environment
- Higher than average proportions agree that they are not the type of person who cycles (83%) and few people they know cycle (76%)
- 75% stated that health issues, disability, or infirmity are important in preventing them from cycling more often; 86% stated lack of fitness as an important barrier



Segmentation analysis

Uninterested Rejecters (11%)



- All currently never cycle for transport or leisure
- All score 1 or 2 out of 10 in terms of propensity to cycle in next 5 years generally or for everyday journeys
- Mostly females (63%)
- Spread across all age groups
- Majority work full-time (59%)
- Focused in C1 (36%) and DE (28%) social groups
- 59% are car drivers – 50% drive at least once a week
- The drivers are strongly committed to car use - 88% agree for most journeys they would rather use the car than any other form of transport; 78% not interested in reducing their car usage; 65% disagree that they would like to use their car less for the sake of the environment
- Segment with the least positive attitudes towards cycling – only 35% agree Scotland would be a better place and 40% agree for the sake of the environment it would be better if more people cycled; 77% agree they know very few people who cycle; 93% agree they are not the type of person who cycles
- Lack of agreement to environmental questions and less likely to adopt environmentally friendly measures into their lives.
- Little would motivate uninterested rejecters to take up cycling



Segmentation analysis

Practical Rejecters (10%)



- All currently never cycle for transport or leisure
- All score 1 or 2 out of 10 in terms of propensity to cycle in next 5 years generally or for everyday journeys
- Split equality between males (50%) and females (50%)
- Skew to 25 to 44 year old age group (45%)
- Higher than average proportion have dependant children – 41%
- 68% working full-time or part-time, with 13% retired
- Spread across of social groups, with C1 (32%) has the highest representation
- High levels of car use – 72% drive at least once a week
- 94% of drivers would rather use the car than any other form of transport for most journey; 63% are not interested in reducing car use; 65% disagree that they would like to use their car less for the sake of the environment
- Belief that cycling is not a practical way of getting around (62%); 98% highlight the impracticality of carrying luggage, shopping, etc.; 75% frequently travel with others; and 74% travel too far to cycle
- Do not see themselves as someone who rides a bike (79%); do not know people who frequently cycle (74%)
- Believe cycling takes too long (74%)
- In addition to the impracticality of cycling, there are also concerns about poor weather (81%) and safety (69%)
- Lower than average concern about environmental issues
- There is little that would motivate this group to take up cycling



Segmentation analysis

Other Rejecters (7%)



- All currently never cycle for transport or leisure
- All score 1 or 2 out of 10 in terms of propensity to cycle in next 5 years generally or for everyday journeys
- Marginally more males (54%) than females (46%)
- Skewed to older age groups – 37% over 65 years; 28% 45 to 64 years
- Largest group are retired (39%), followed by those working full-time (23%)
- Skewed to DE social group – 45%
- Relatively low levels of car use – 35% drive at least once a week
- High levels of bus/coach use at least once a week (59%); reasons being convenience (53%), cost (27%), reliability (24%) and lack of an alternative (22%)
- Majority say they are not the type of person to ride a bike (61%)
- However, 62% believe that more people cycling would benefit the environment
- Neutral attitudes to cycling – 51% believe Scotland would be a better place if more people cycle
- Broad concerns about cycling – 52% cycling not practical (luggage), 46% poor weather, 41% safety, and 34% lack of cycling infrastructure
- One in five (21%) state their main barrier to cycling as the fact that they can't ride a bike
- There is little that would motivate this group to take up cycling





Summary and conclusions

Summary and conclusions



- 1060 face-to-face interviews have been conducted with a representative sample of the population.
 - The research provides a wealth of data and insight, and a baseline against which future research can be compared.
 - Whilst much data already exists relating to cycling behaviours and attitudes, this dataset provides an opportunity for extensive analysis to reveal new insights – specifically relating to sub-groups within the population and identifying key segments.
- Around one quarter of the population cycle, at least occasionally. One tenth cycle on a weekly basis.
- However, the research indicates a large proportion (around 60%) of the population have an entrenched reluctance to consider cycling more frequently. Amongst current non-cyclists the proportion is around 75%.
 - Those most resistant are females, older age groups and lower socio-economic groups.
- However, attitudes towards cycling in general are positive. People understand the benefits for the environment and Scotland as a whole.

Summary and conclusions



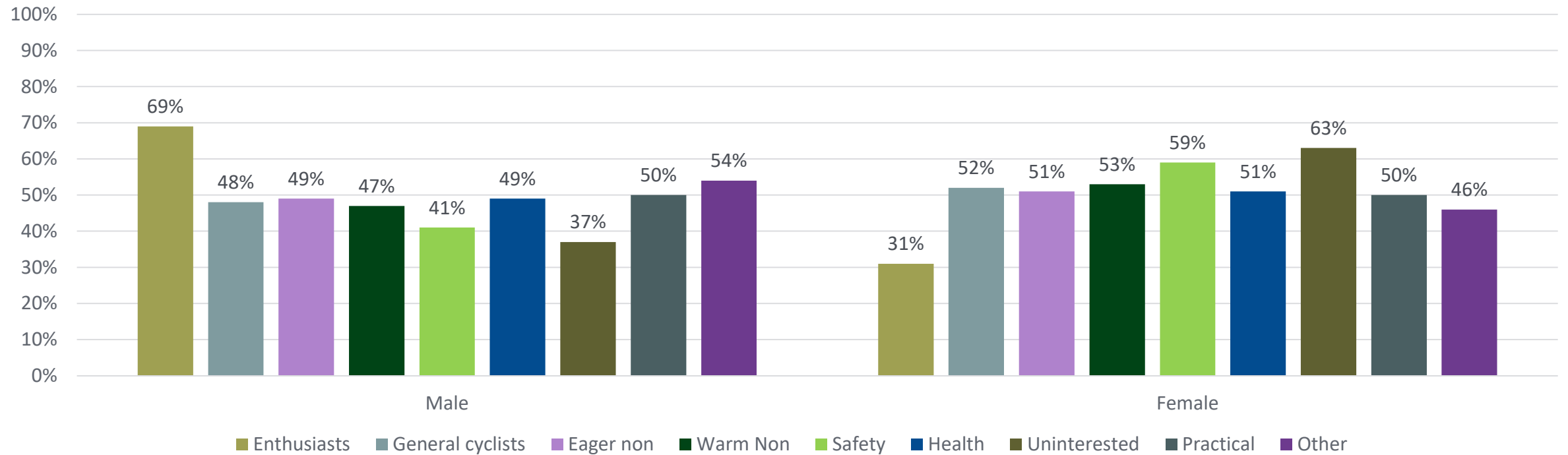
- The research indicates that many people simply can't visualise themselves as cyclists. Many also do not know many people that cycle.
- The most motivating factors are better cycling infrastructure and a personal desire to improve health.
 - Environmental concern, cost savings and less traffic were also identified as motivating factors.
- The key barriers are perceptions of safety on the roads, practicalities of transporting things, insufficient cycle lanes and the weather.
 - A combination of barriers seem to affect the decision not to cycle – with the relative importance of each affected by gender, age, socio-economic groups.
 - Not enjoying cycling, health and fitness seem to be key barriers for the most resistant to cycling – generally females, older age groups and lower SEG.
- Segmentation analysis will be key to exploring these bridges and barriers further.
 - Understanding who current regular cyclists are
 - Profiling people warm to the idea of cycling, and who just need encouragement and motivation.
 - Understanding the sections within the population unlikely to adopt cycling, or change transport habits.

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Appendix I - Segmentation analysis charts

Segments

Gender

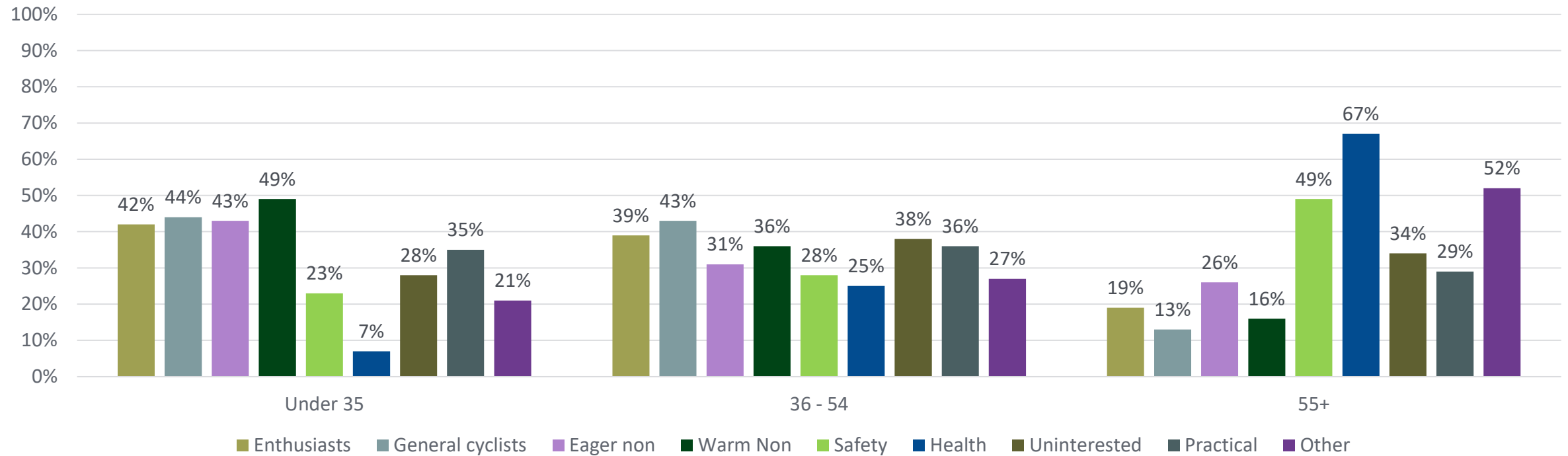


- Cycling Enthusiasts were more likely to be male than any other segment.
- A higher than average proportion of Uninterested and Safety Rejecters were female.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments

Age

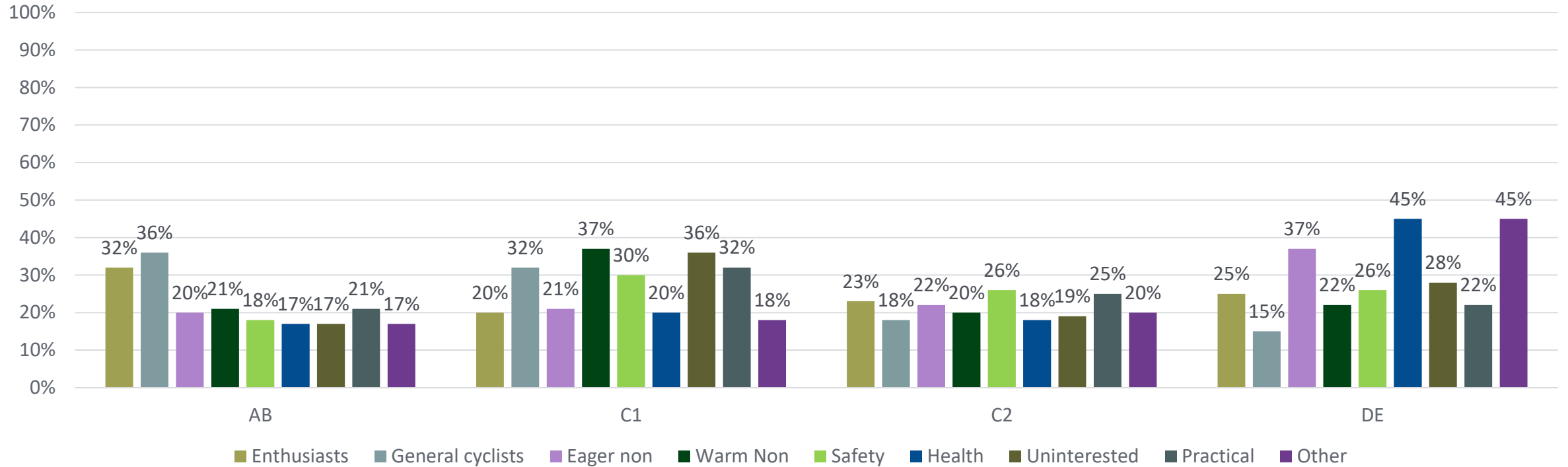


- Current cyclists, and those non-cyclists who would like to cycle more, tended to be in the younger age groups.
- Those who tended to reject cycling for health, safety and other reasons were most likely to be in the older age groups.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments

Socio-economic group

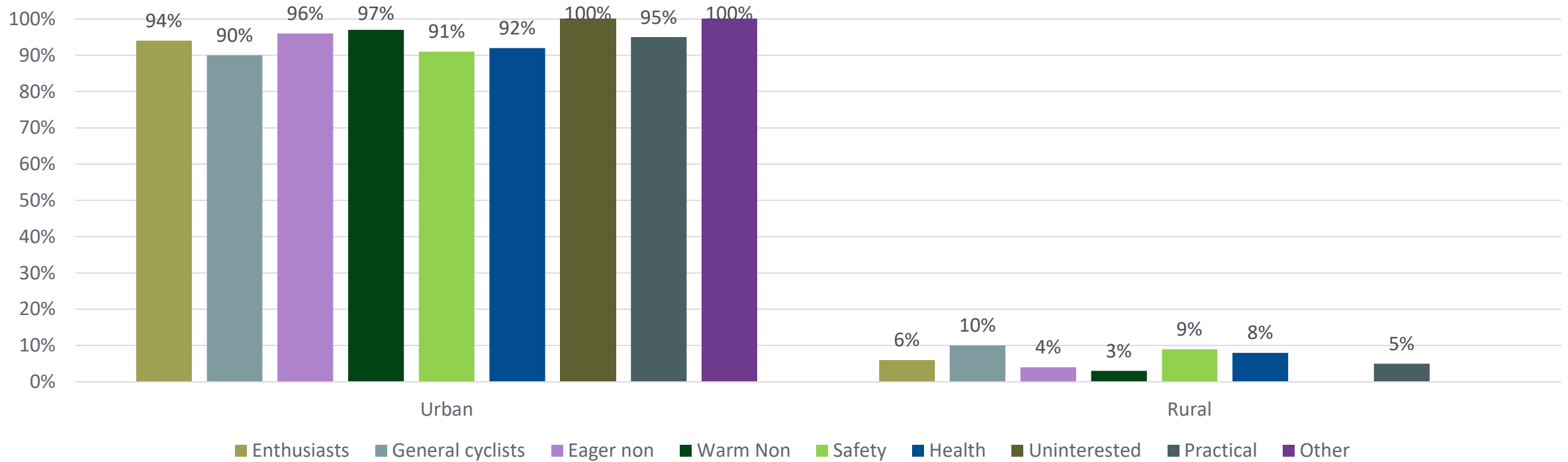


- The two cyclists groups were the most likely to be AB.
- Higher proportions of Eager Non-cyclists, Health Concerned Rejecters, and Other Rejecters were DE.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments

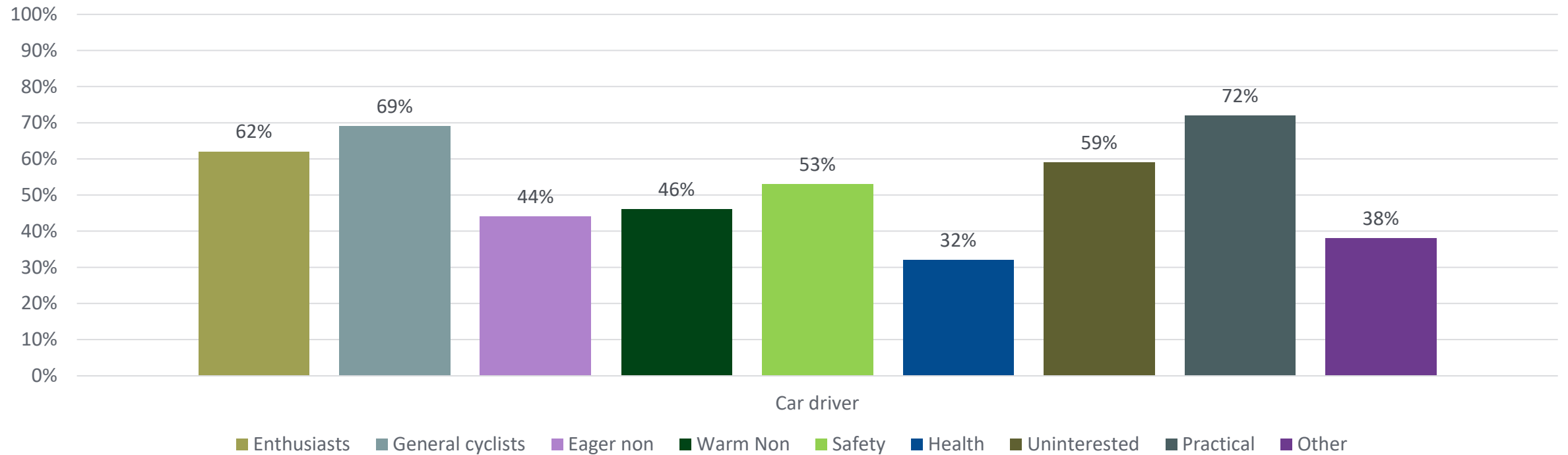
Urban / Rural



- Slightly higher proportions of people from rural areas in General Cyclists, Safety Rejecters and Health Rejecters segments.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments Car Drivers



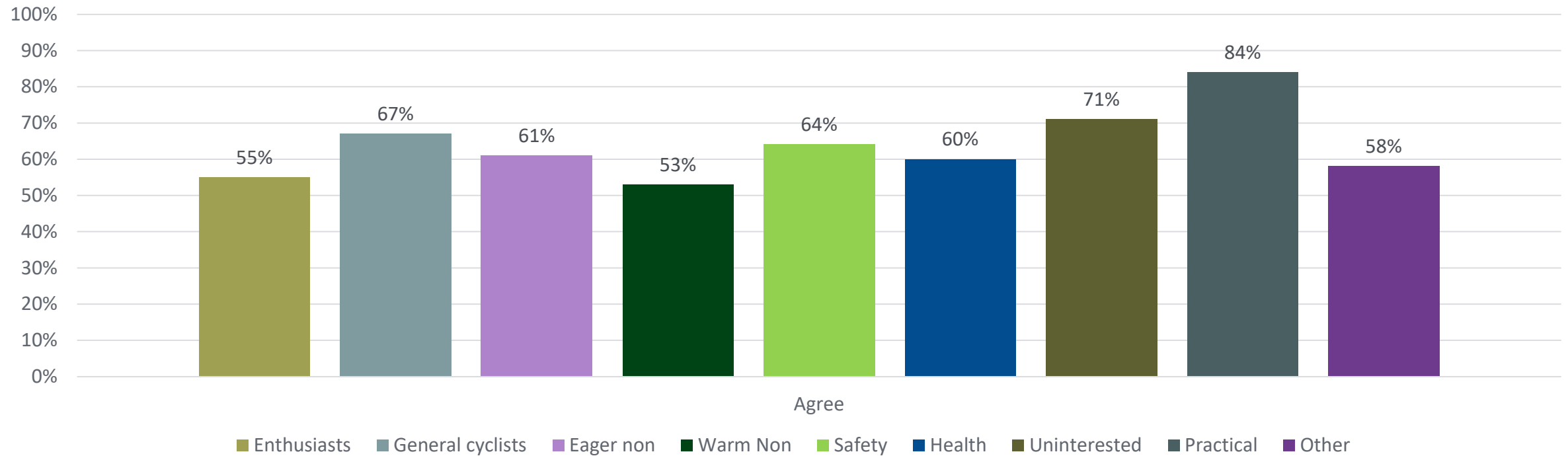
- Those most likely to be a car driver were General Cyclists and Practical Rejecters.
- Those least likely to be a car driver were Health Rejecters and Other Rejecters.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments



People should be allowed to use their cars as much as they like



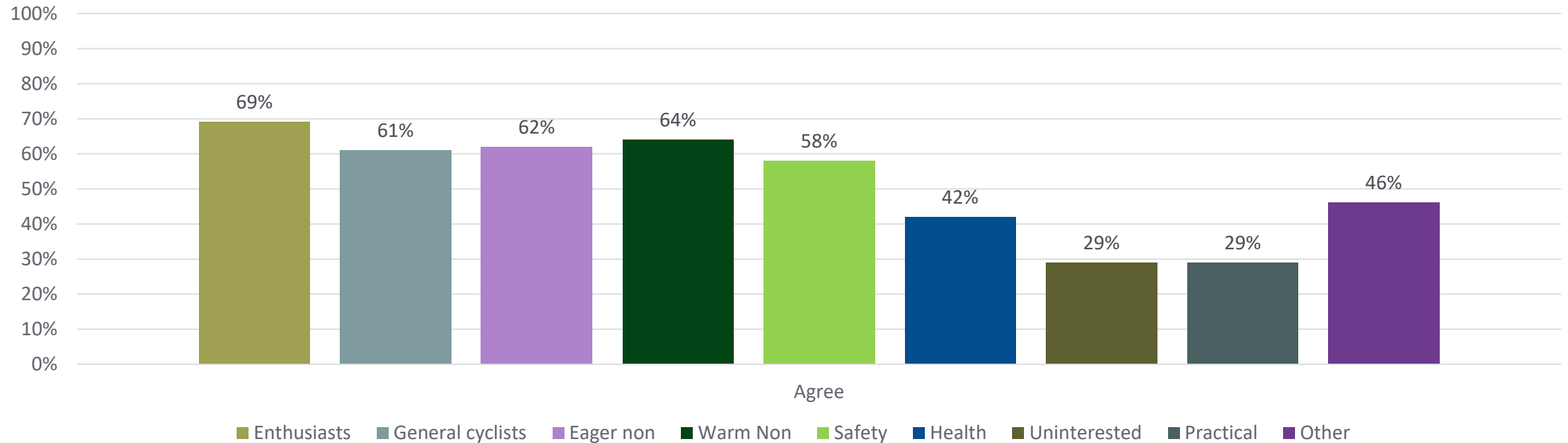
- Practical Rejecters were the most likely group to agree that people should be allowed to use their cars as much as they would like.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments



I would support reducing car usage to improve the air quality in my local area



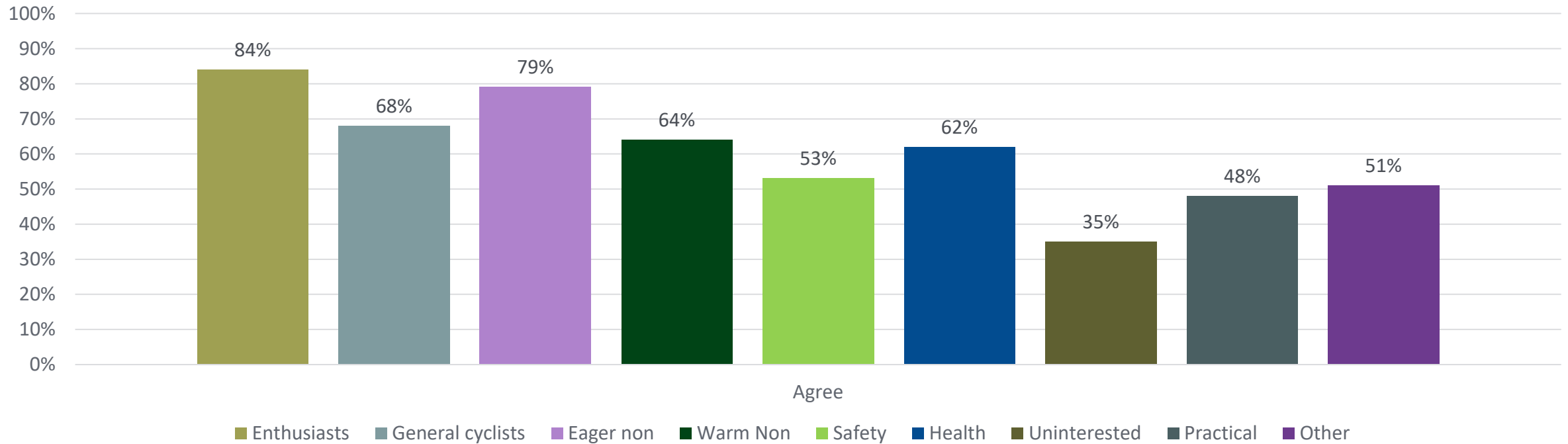
- Practical and Uninterested Rejecters were the least likely to support reducing their car usage.
- Cycling Enthusiasts were the most likely to support the idea of reducing car usage to improve air quality.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments



Scotland would be a better place if more people cycled

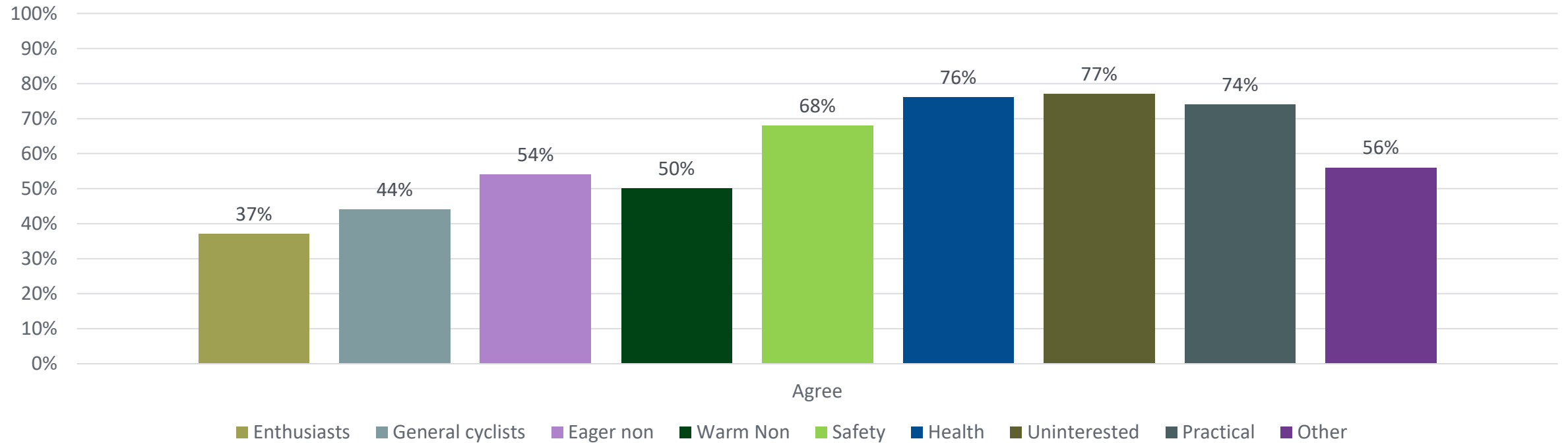


- Cycling Enthusiasts and those who are keen to take up cycling are the most positive about Scotland being a better place if more people cycled.
- Those who just don't like cycling were the least likely to agree.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments

Very few people I know cycle



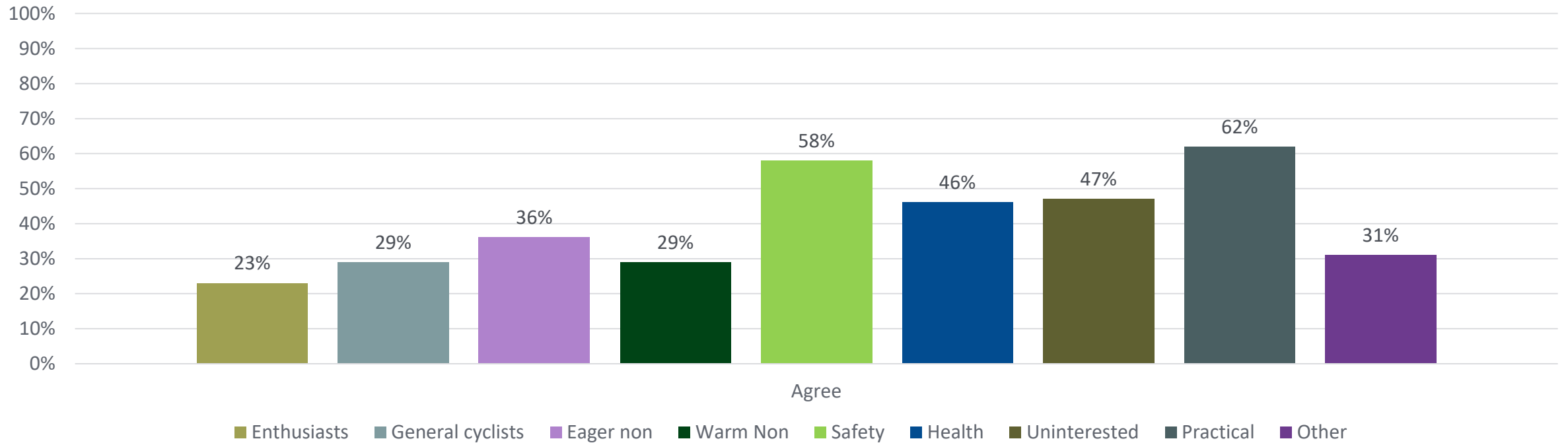
- Cycling Rejecters are more likely to agree that very few people they know cycle than those who currently cycle or who would consider taking up cycling.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments



Cycling is not a practical way of getting around



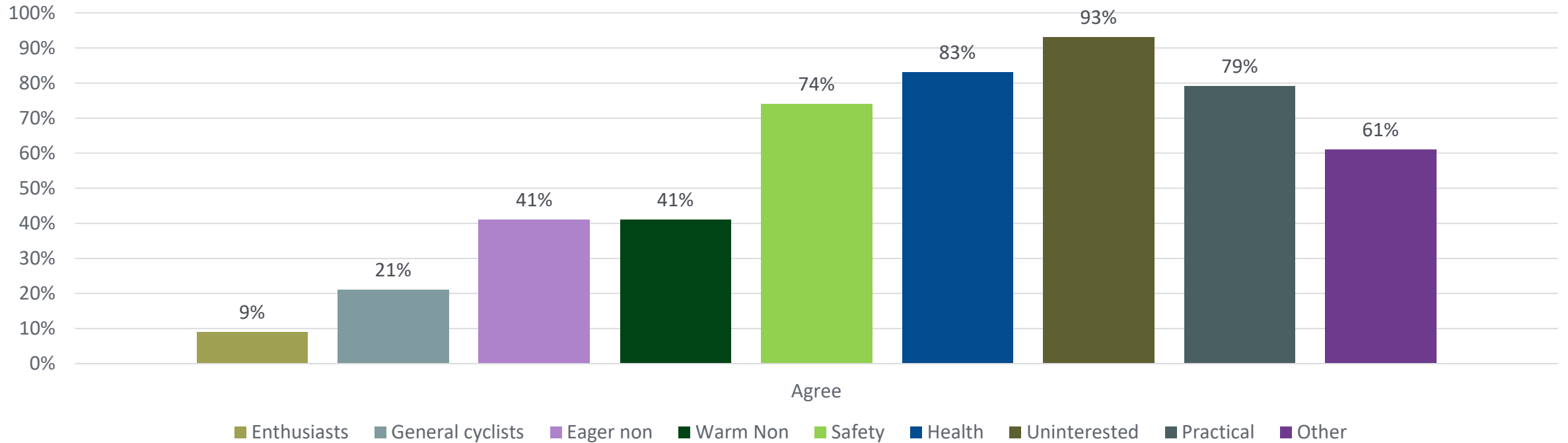
- Cycling is most likely to be viewed as impractical by Practical Rejecters and Safety Rejecters.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments



I am not the kind of person who rides a bike



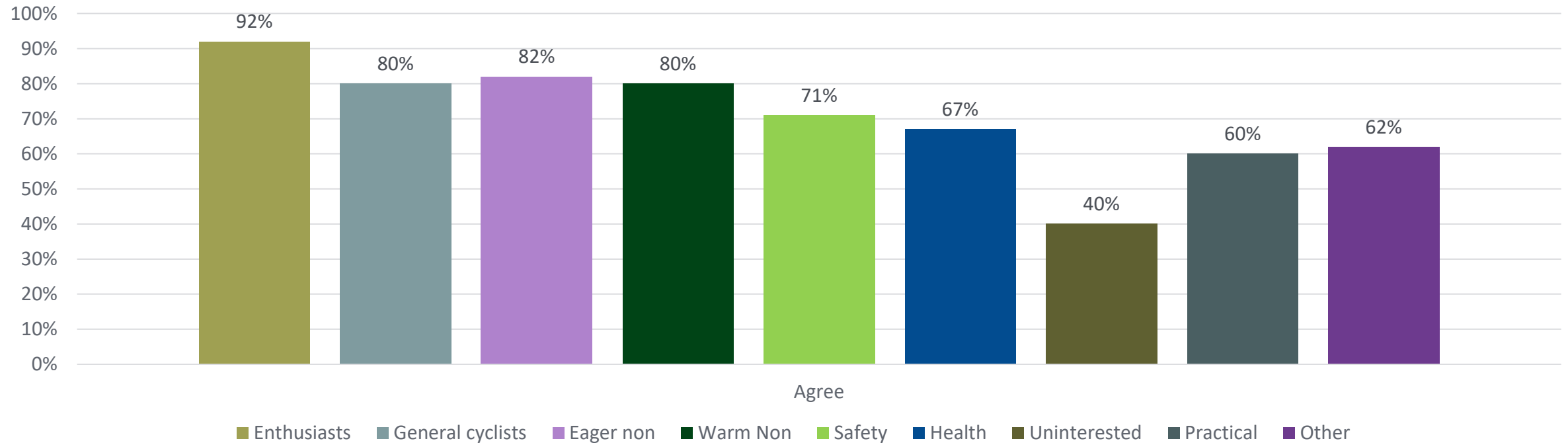
- As expected, cycling rejecters are much more likely to agree that they are not the kind of person who rides a bike than those who currently cycle or those who would consider taking up cycling..

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Segments



For the sake of the environment it would be better if more people cycled



- Most respondents across all segments agree that it would be better for the environment if more people cycled.
- The only exception is the segment of Uninterested Rejecters – only 40% agreed with this statement.

Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

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Appendix II

- Urban / rural analysis

Urban / rural analysis



- There were some key differences in findings between people living in urban and rural areas.
- People living in urban and rural areas were equally likely to cycle for transport and leisure. There were also no significant differences between these groups in terms of propensity to cycle more in the future.
- However, people living in rural areas were more likely to be regular car drivers (78% drive at least once a week) than those living in urban areas (49% drive at least once a week).
- However, rural dwellers were more likely to agree that they would like to use their car less for the sake of the environment and disagree that they are not interested in reducing their car usage.
- The key barriers to cycling for people living in rural areas were the traffic/speed of traffic, not feeling safe, journeys are too far and the practicalities of travelling with others or carrying luggage. These barriers tended to be important to higher proportions of rural respondents than urban respondents.
- Rural respondents tended to be more affluent than urban respondents, and were also more likely to be car owners.

Bases: Urban (1000); Rural (60*)

*The base of rural respondents is small and therefore findings should be treated with caution.

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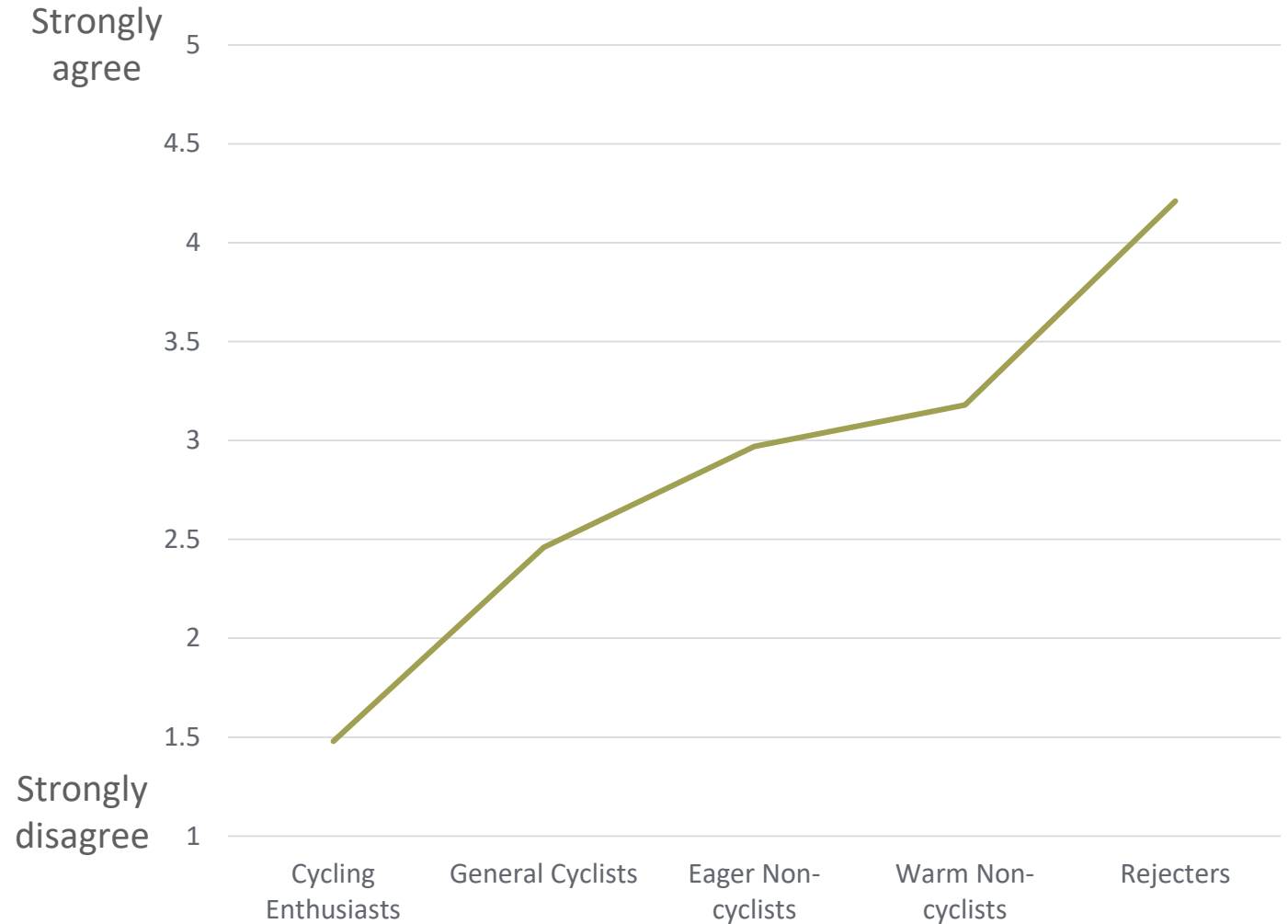
Appendix II

– Propensity analysis

Propensity analysis

- There is a strong correlation between cycling propensity and agreement with the statement 'I am not the kind of person who cycles'.
- As we would expect, cycling rejecters were the most likely to agree with this statement, whilst cycling enthusiasts were the most likely to disagree.

'I am not the kind of person who cycles'

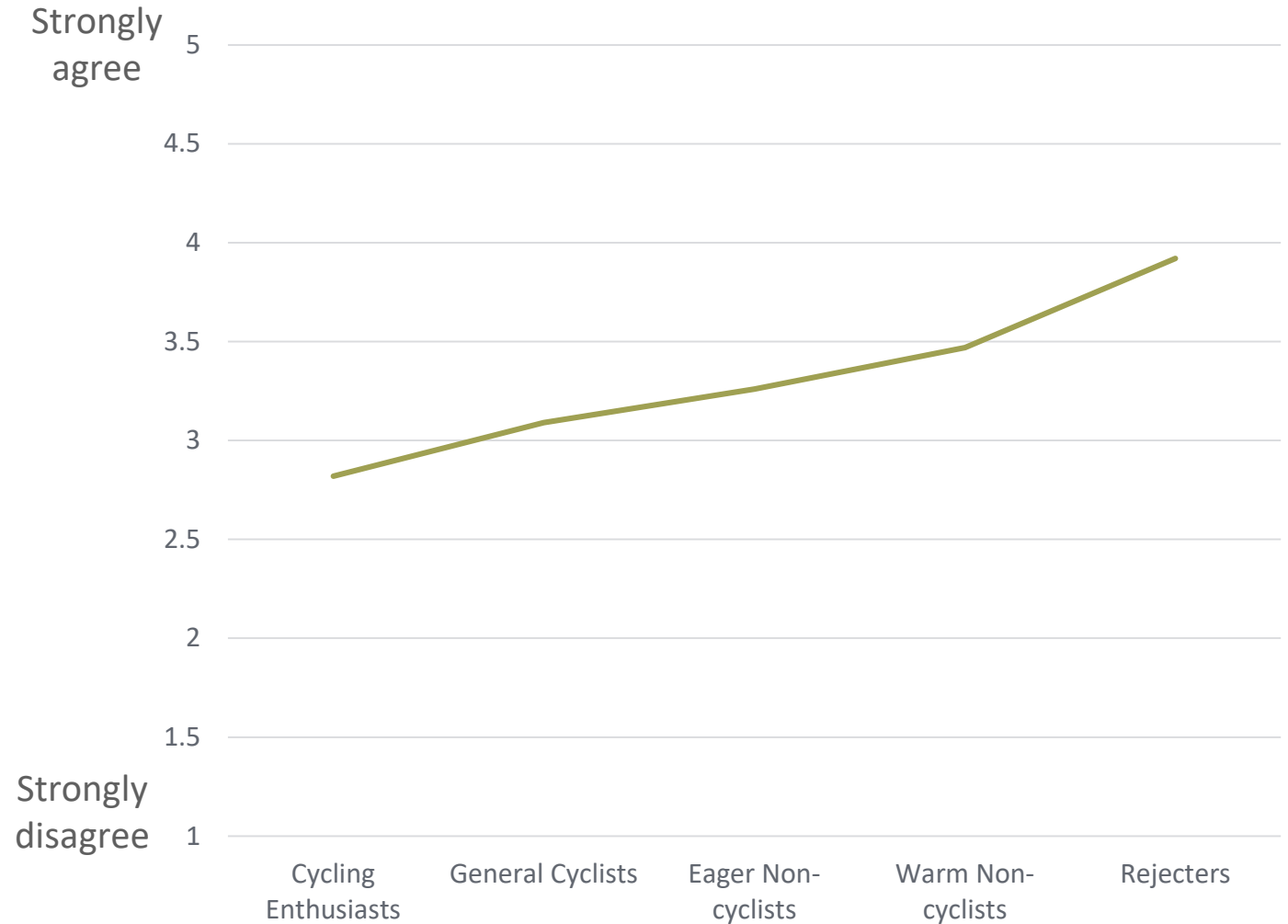


Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Rejecters (604)

Propensity analysis

- Agreement with the statement 'very few people I know cycle regularly' was less strongly correlated with propensity to cycle.
- Cycling Enthusiasts were the most likely to disagree with this statement and Rejecters were the most likely to agree. The difference in agreement between these two groups was statistically significant.
- General Cyclists and Eager Non-cyclists showed a similar level of agreement with this statement.

'Very few people I know cycle regularly'

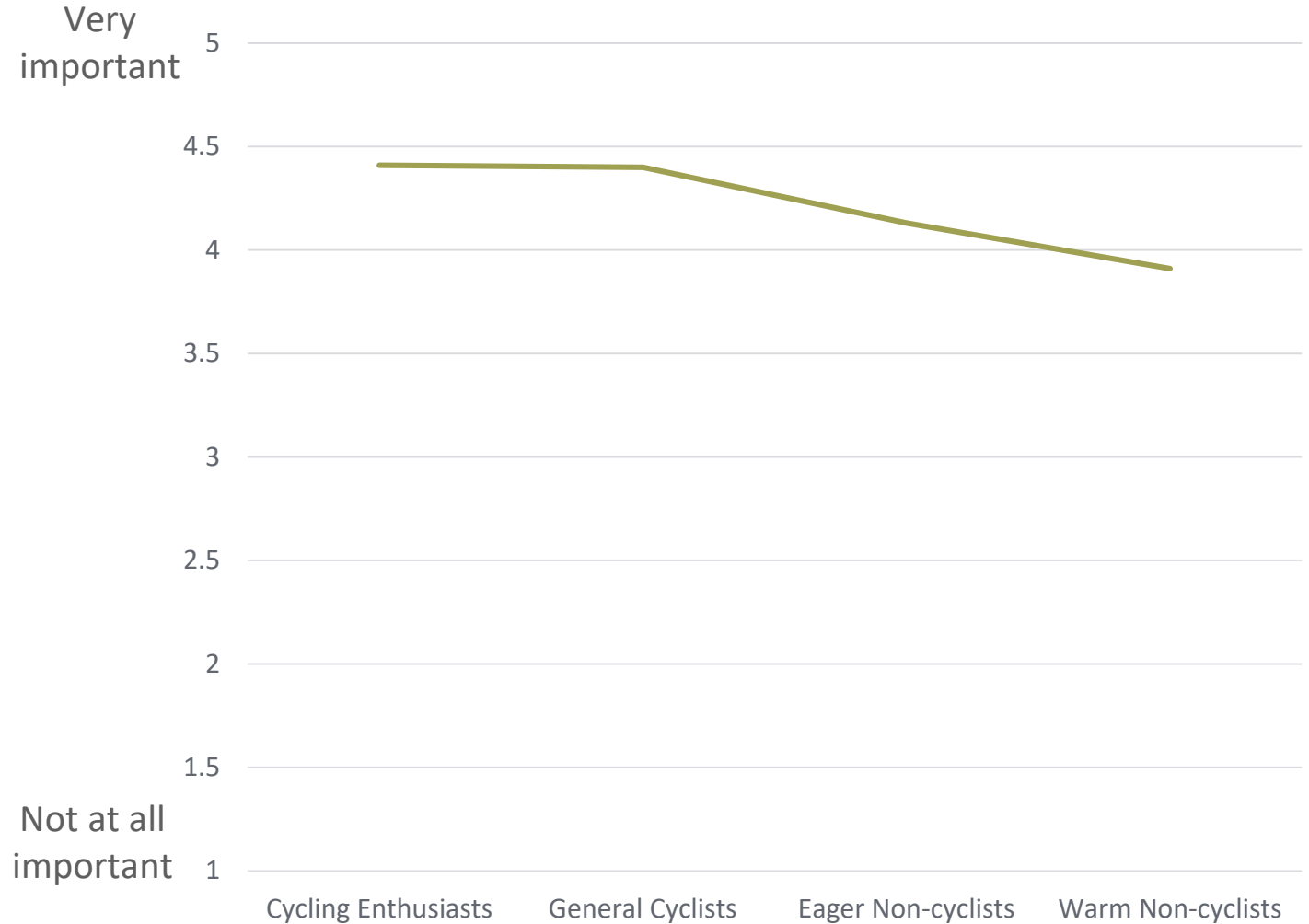


Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Rejecters (604)

Propensity analysis

- This question was not asked of Cycling Rejecters.
- Warm Non-cyclists were less likely to state getting fit/to improve health as a motivation to cycle than Cycling Enthusiasts and General Cyclists.

Motivated to cycle to get fit/improve health

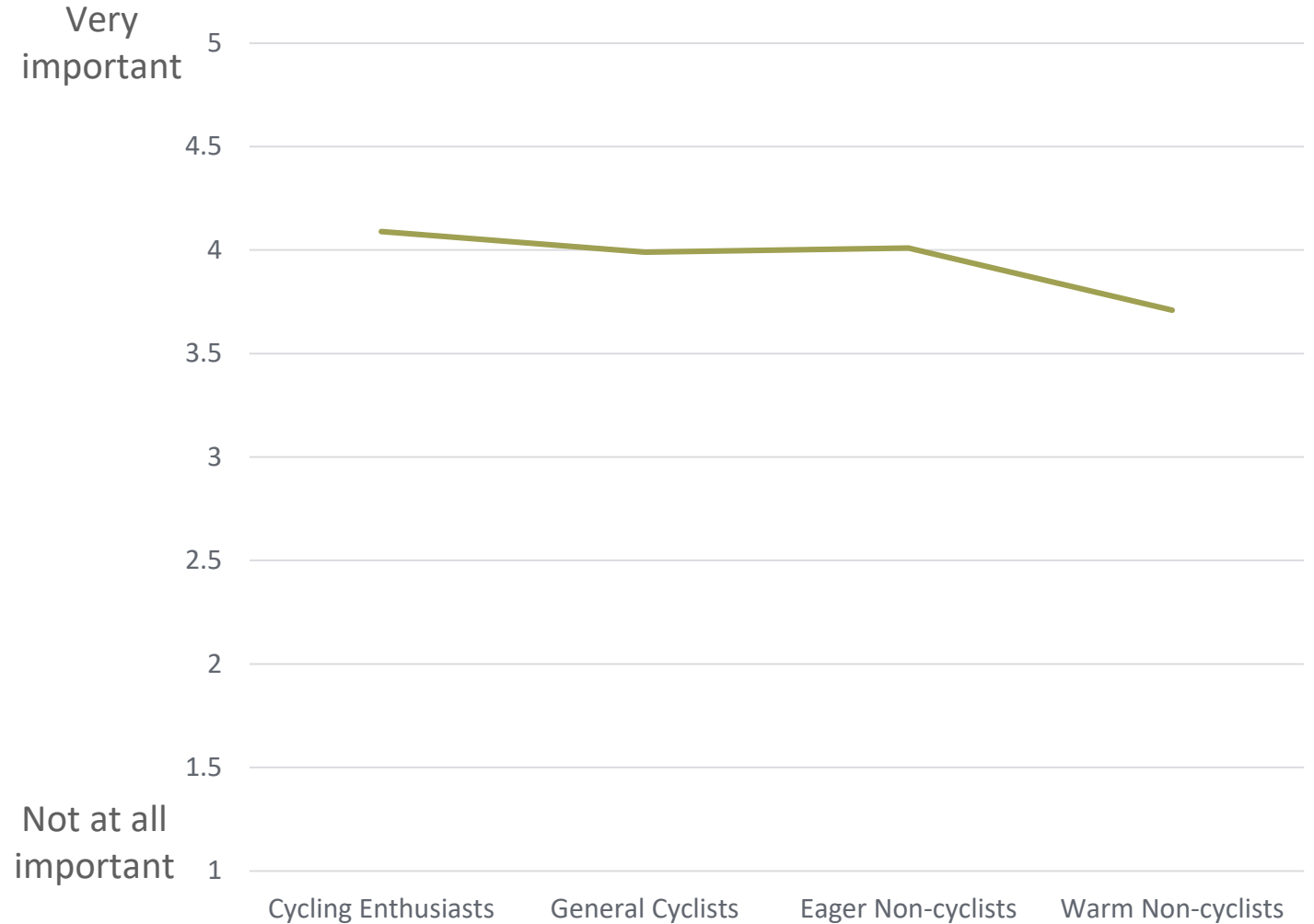


Base (excluding rejecters): Enthusiasts (161); General Cyclists (91); Eager Non-cyclists (95); Warm Non-cyclists (76)

Propensity analysis

- This question was not asked of Cycling Rejecters.
- Ratings of the importance of cycling to help the environment were similar across the spectrum of propensity to cycle.

Motivated to cycle for the sake of the environment



Base (excluding rejecters): Enthusiasts (161); General Cyclists (91); Eager Non-cyclists (95); Warm Non-cyclists (76)

Technical appendix

Method and sampling



- The data was collected by face-to-face CAPI interviews.
- The target group for this research study was a representative sample of the Scottish population.
- The target sample size was 1050 and the final achieved sample size was 1060.
- Fieldwork was undertaken between 28th August and 19th September 2017.
- Respondents were selected using a stratified random sampling technique, where interviewers worked to specified quota controls on key sample criteria, and selected respondents randomly within these quotas.
- The sample provides a robust and representative sample of the population when compared to Census 2011 statistics.
- In total, 22 interviewers worked on data collection.
- Each interviewer's work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by telephone) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where telephone details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.

Technical appendix

Data processing and analysis



- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
- For CAPI Questionnaires these checks include:
 - Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
 - Using our analysis package SNAP, data received via over-the-air synchronisation is imported from our dedicated server.
- A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
- Where “other” type questions are used, the responses to these are checked against the parent question for possible up-coding.
- Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
- A SNAP programme set up with the aim of providing the client with useable and comprehensive data. Cross-breaks are discussed with the client in order to ensure that all information needs are met.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.