

Cycling Scotland

Registered Charity No. SCO29760

progressive

Cycling Scotland

Attitudes and behaviours towards
cycling in Scotland



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.

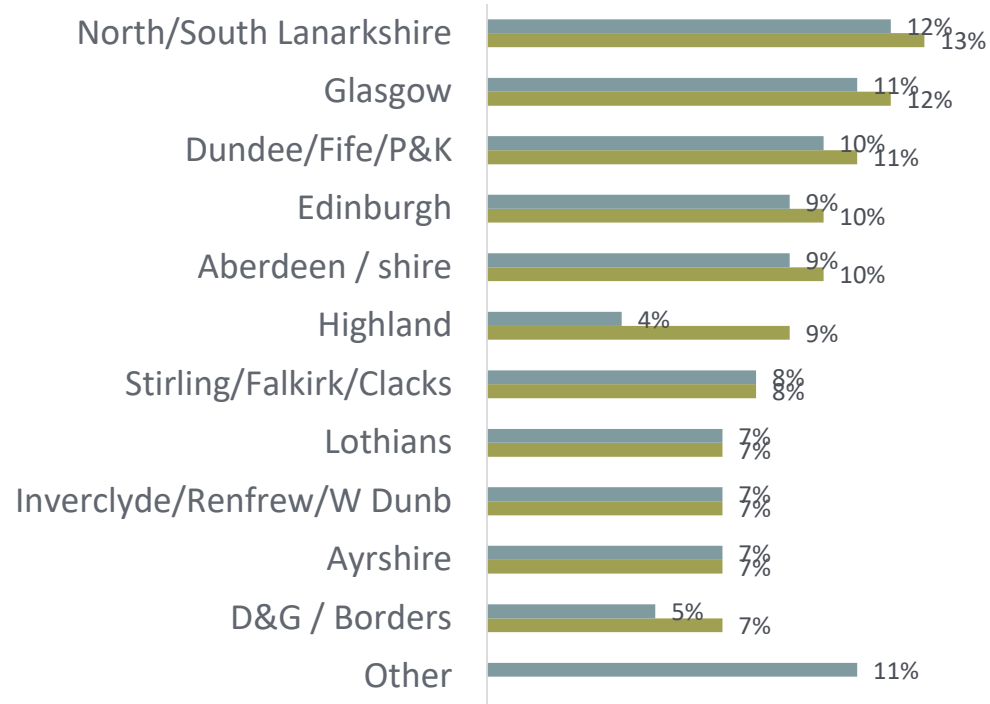
However, no specific Scottish population-wide longitudinal research into cycling behaviours and attitudes had previously been undertaken.

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.

Sample profile

Location

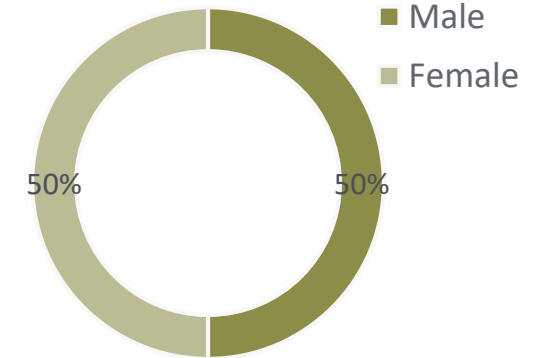
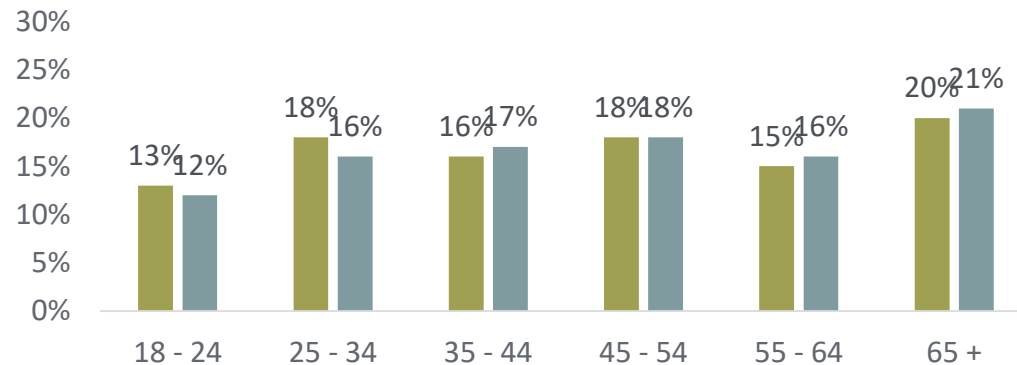


Cycling Scotland

Registered Charity No. SCO29760

■ Scotland
■ Sample

Age and gender



Base (all): 1060

Transport choices

Key insights



- 43% of respondents reported having access to an adult bike in their household.
- Two thirds of respondents reported having access to a car or van in the household.
- 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%).

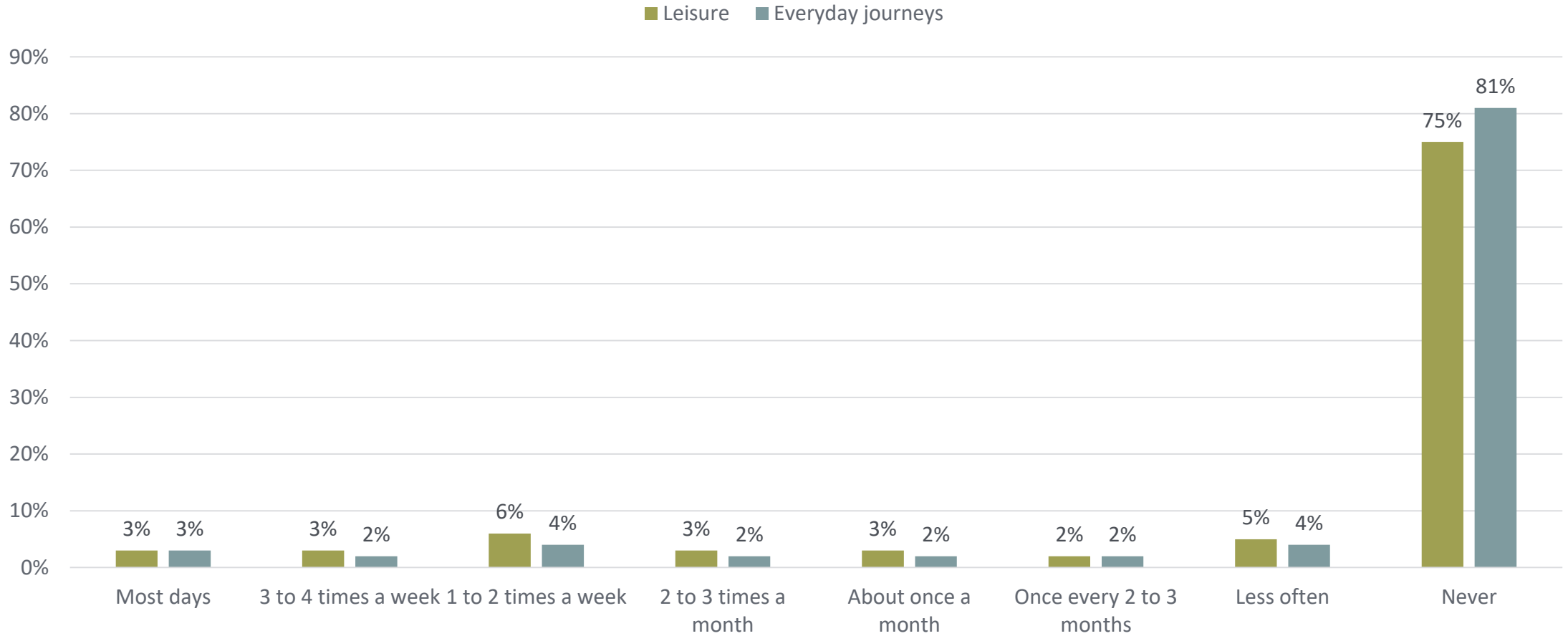
Cycling behaviours

Frequency



How regularly do you cycle?

Q1: How often do you use modes of transport for journeys?
Q7: How regularly do you tend to cycle for leisure or sport?



Base (all): 1060

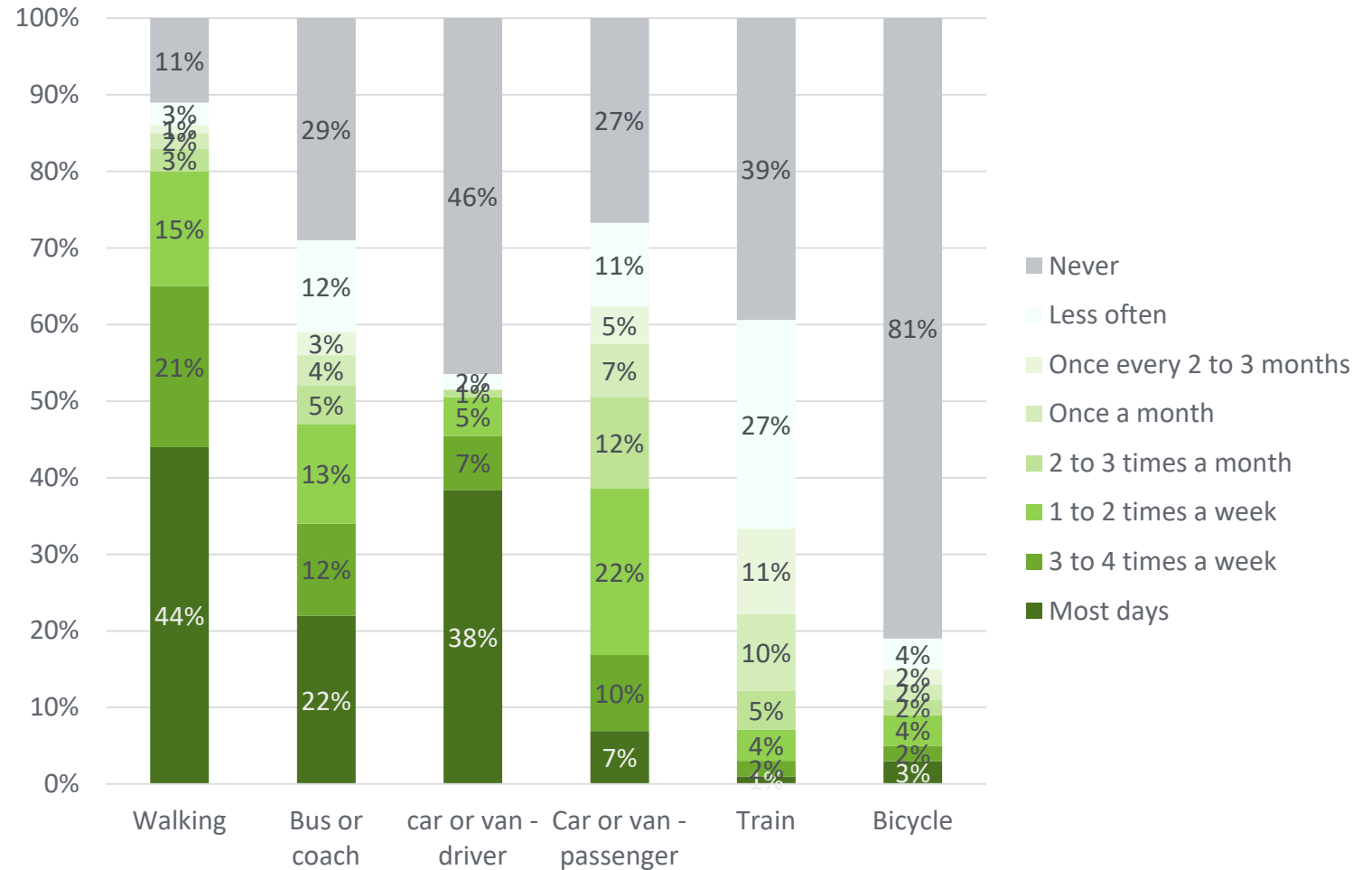
Transport choices

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

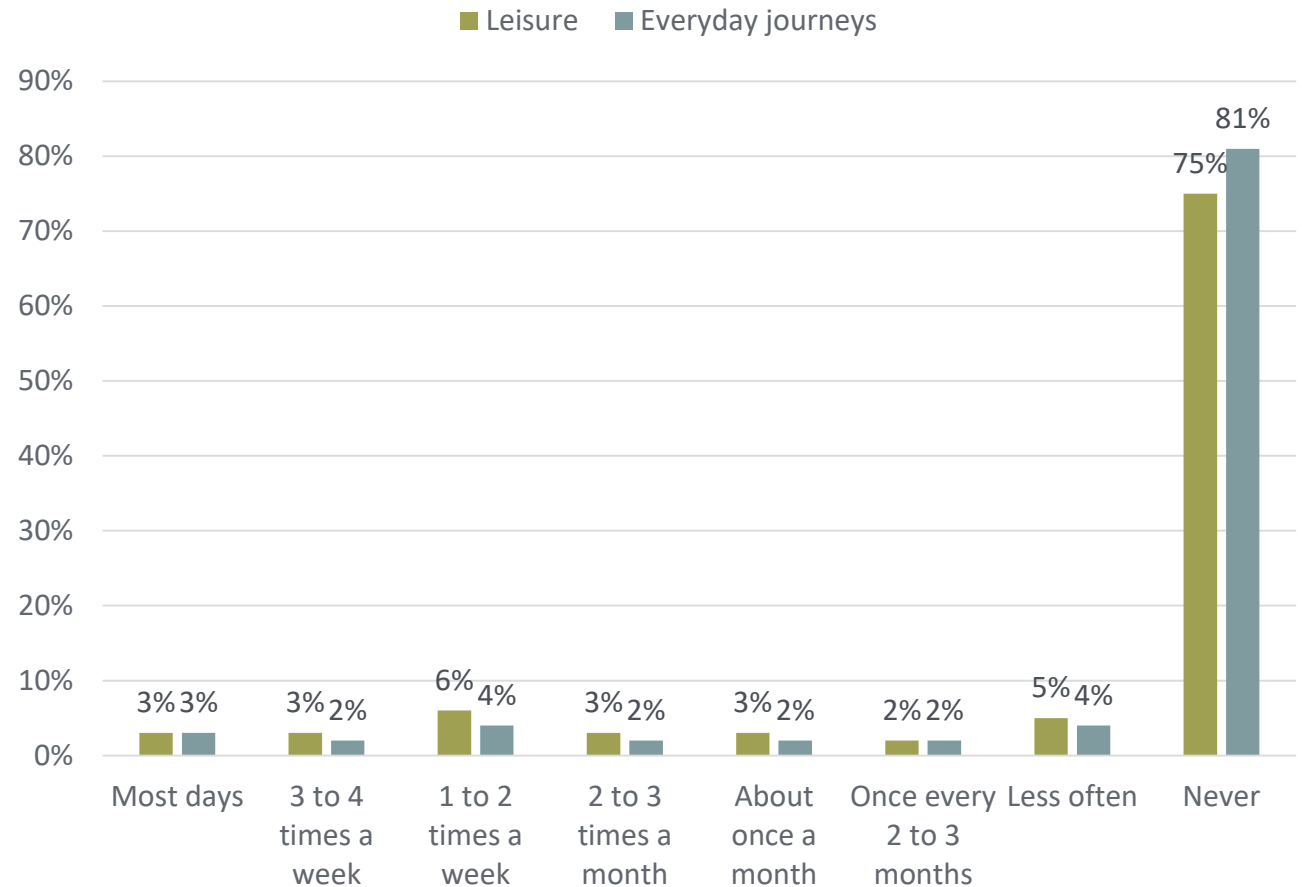
Cycling behaviours

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

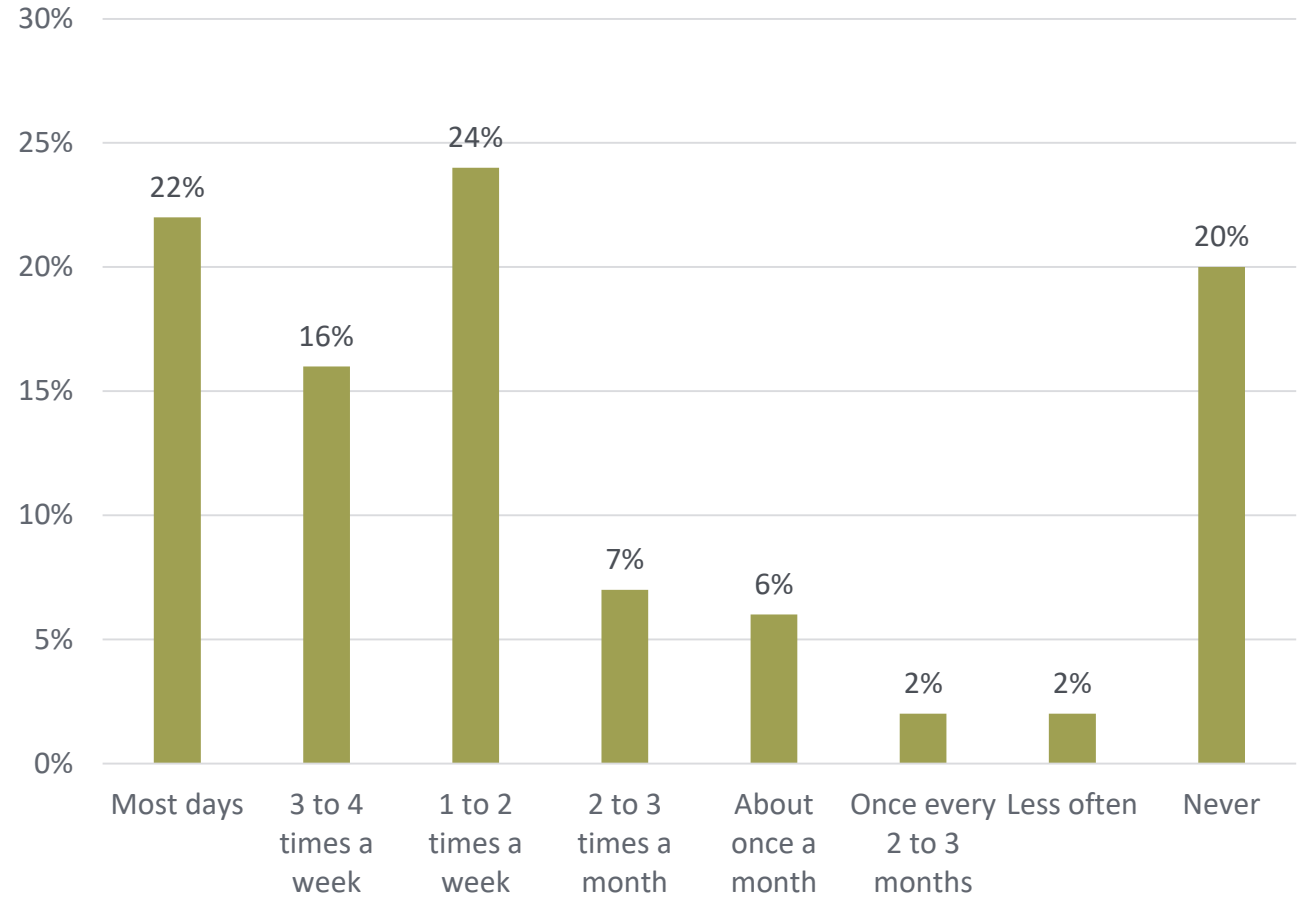
Cycling behaviours

Frequency of child cycling

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

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

How often does your child tend to cycle? - Parents



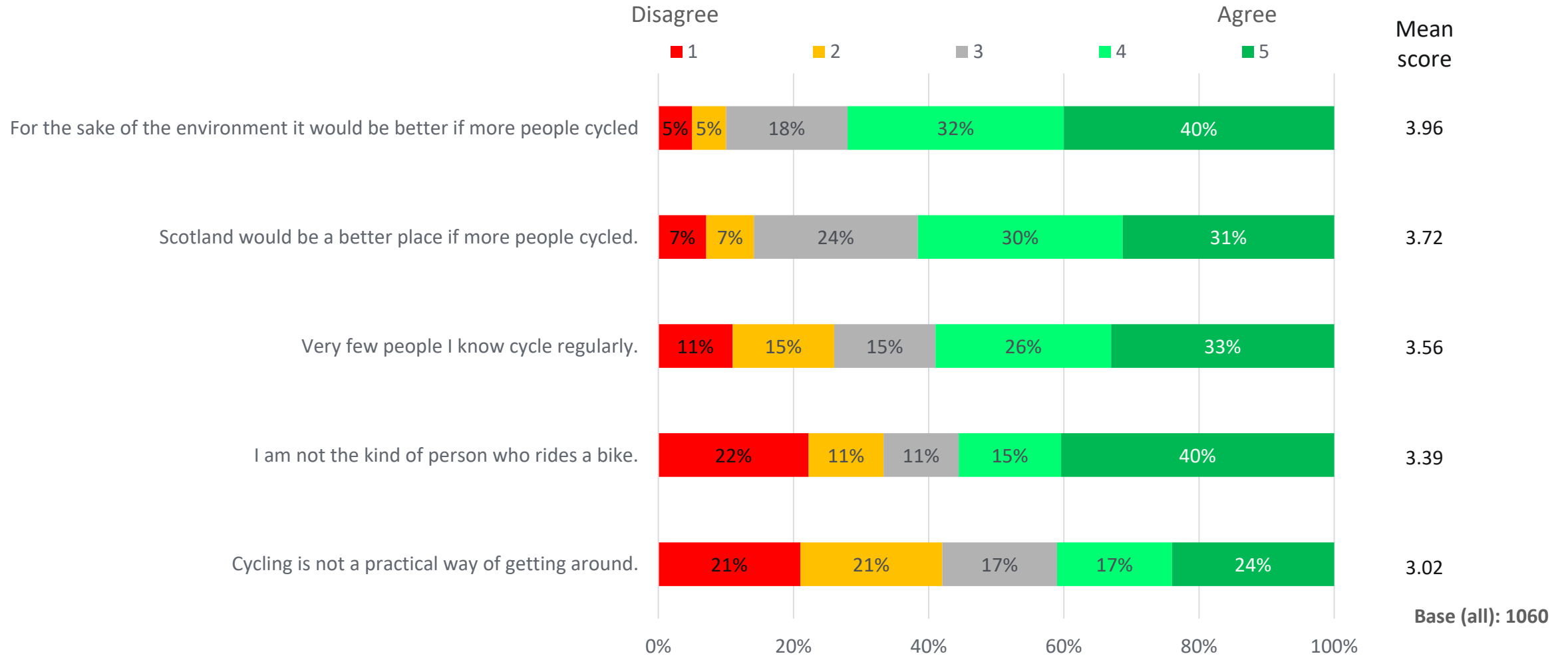
Cycling Scotland

Registered Charity No. SCO29760

Attitudes to cycling



Agreement / disagreement with statements on cycling - Population



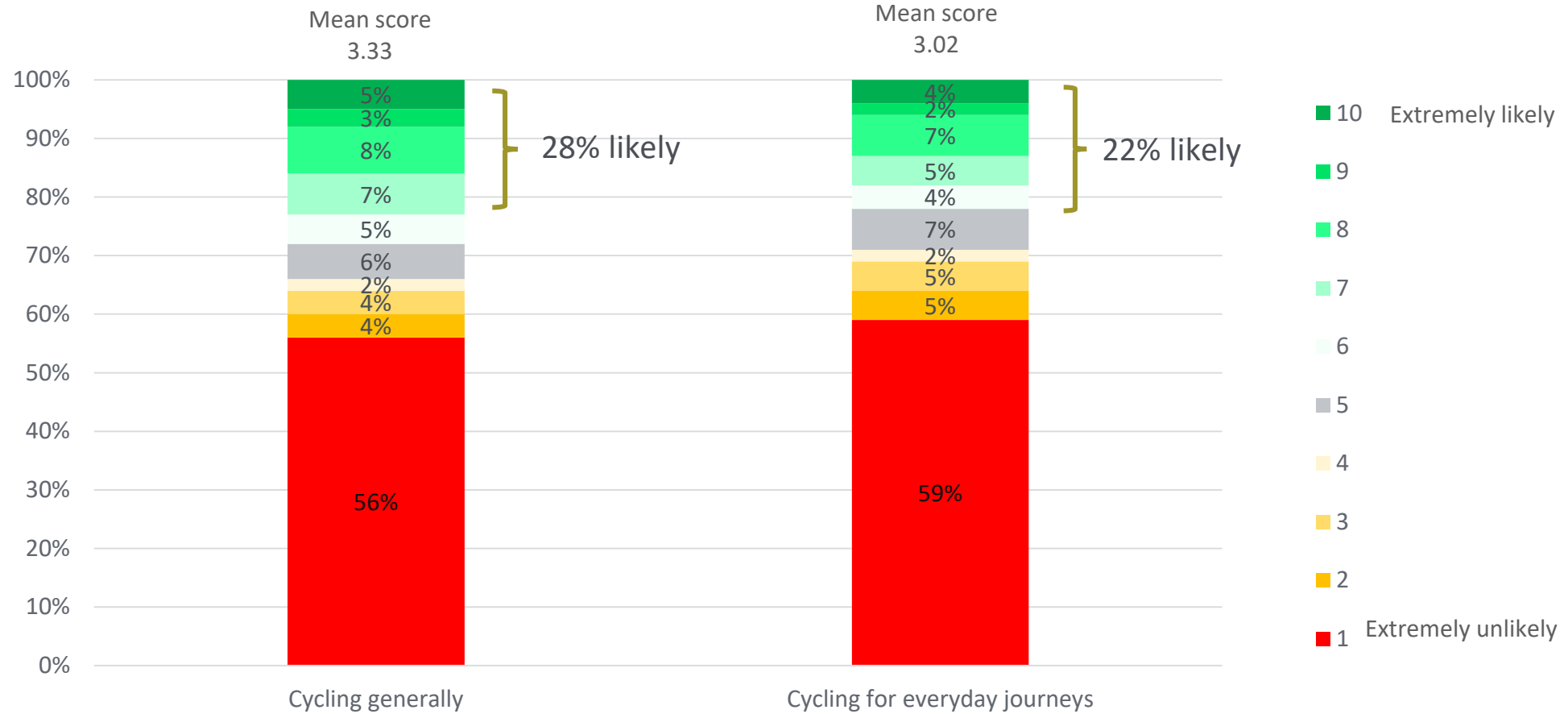
Q5: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Attitudes to cycling

Propensity to increase cycling



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



Base (all): 1060

Cycling Scotland

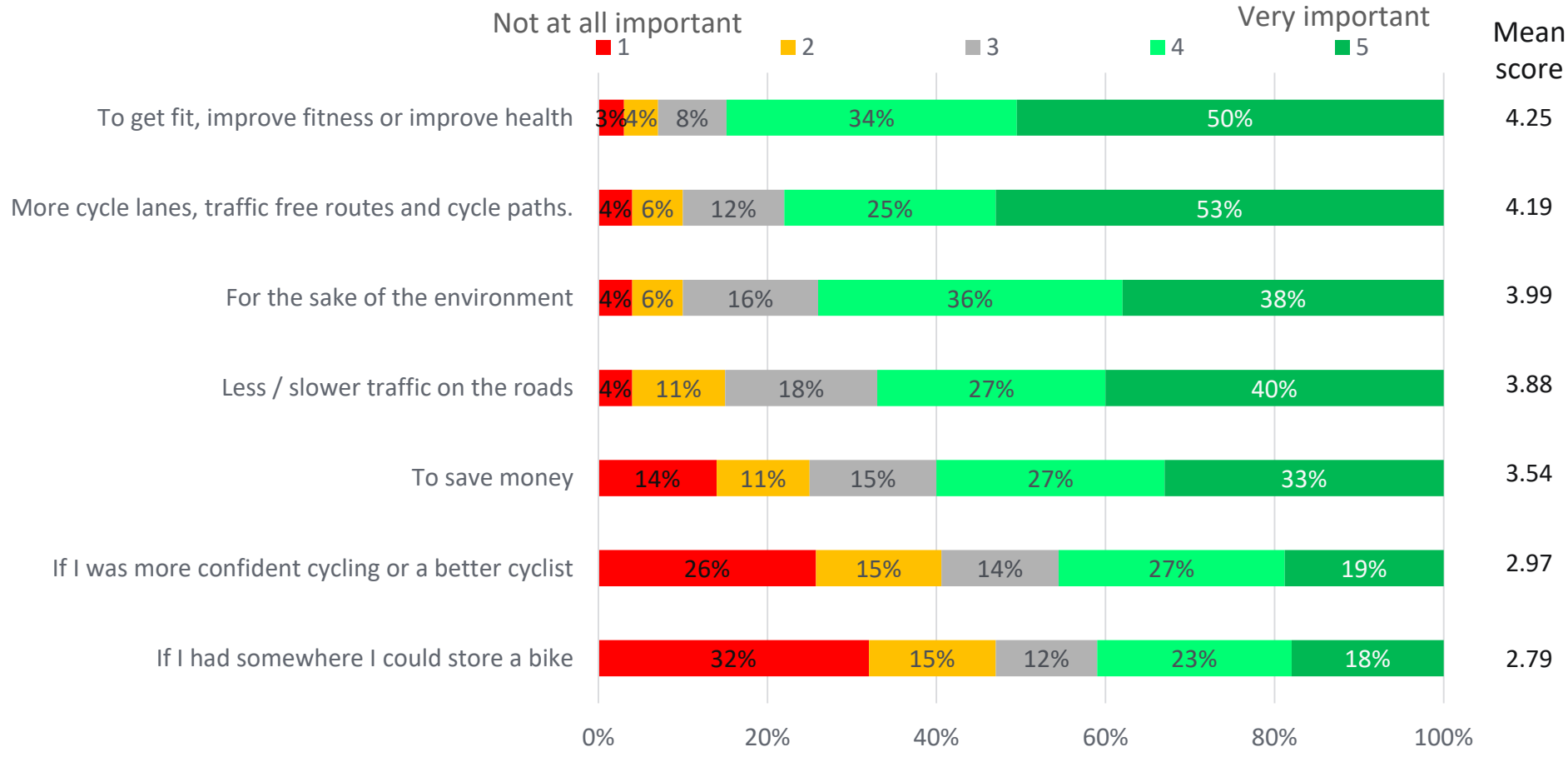
Registered Charity No. SCO29760

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?

Attitudes to cycling

Motivations to cycle

Importance of motivating factors to cycle for everyday journeys



Base (all who score 3 or more for propensity to cycle: 429)

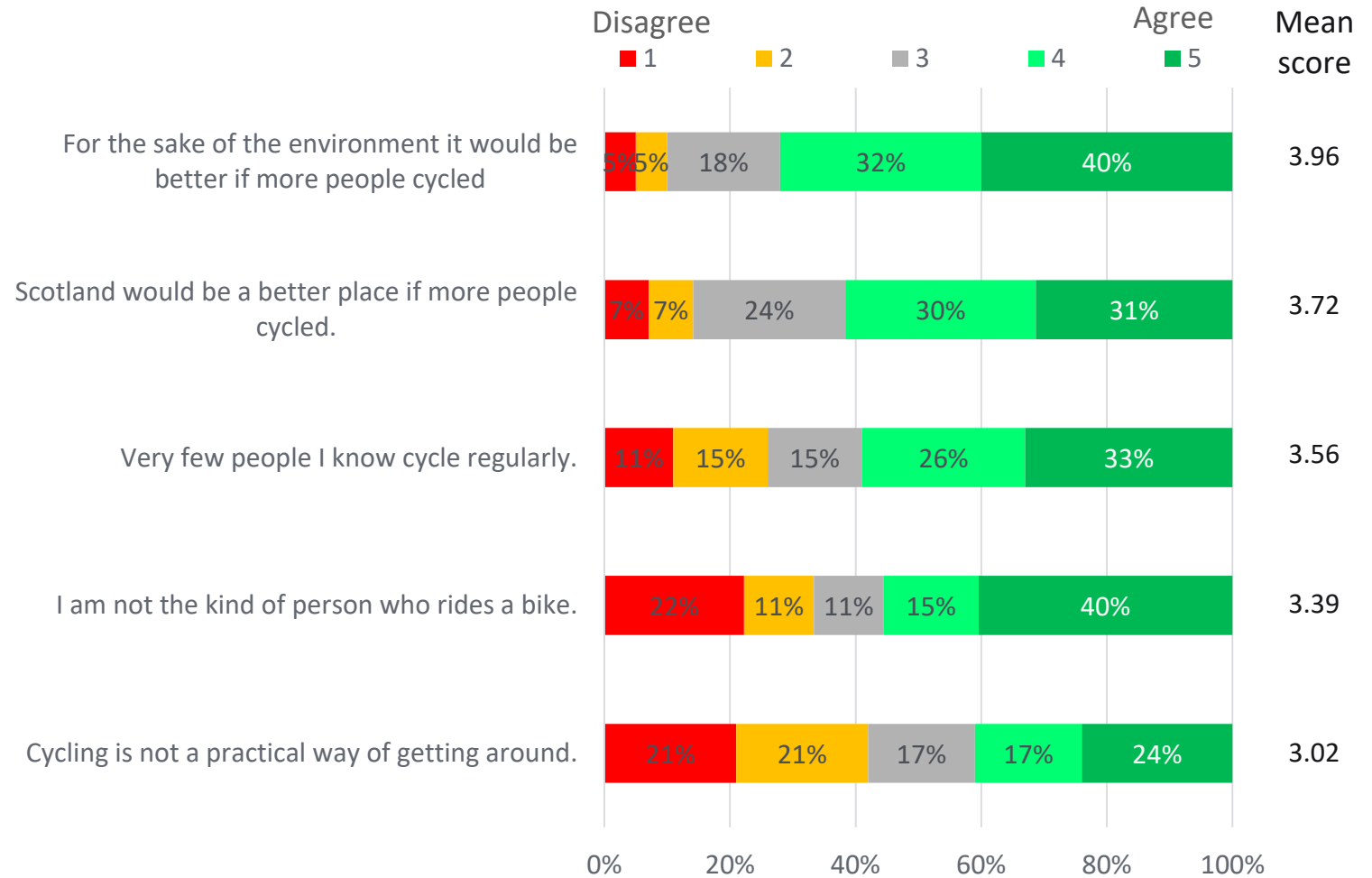
Q12: I am going to read out a list of factors that some people have said would encourage them to cycle for everyday journeys. For each factor, please tell me how important each statement is or would be to you in encouraging you to cycle more often for everyday journeys.

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

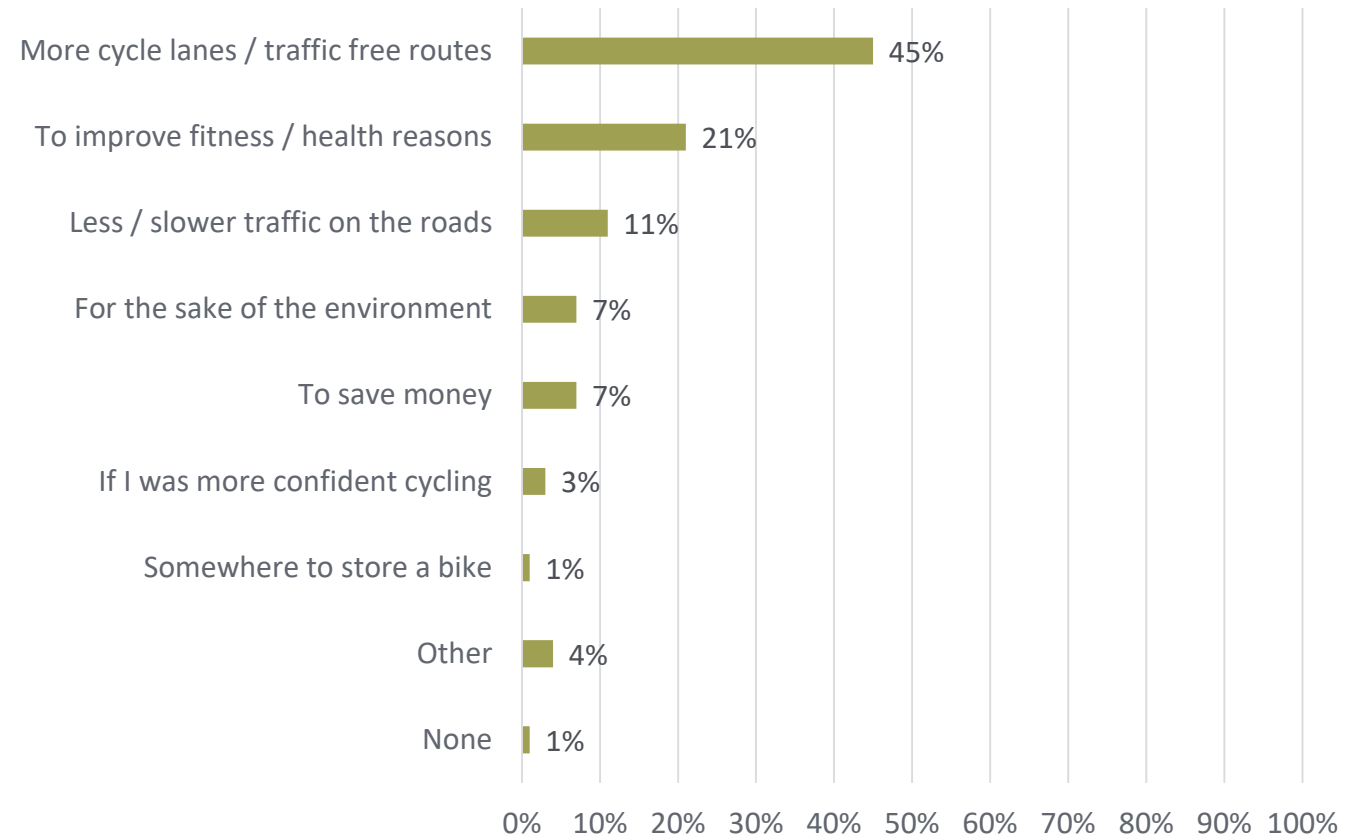
Attitudes to cycling

Key motivation to cycle

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

Base (all who score 3 or more for propensity to cycle): 429

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

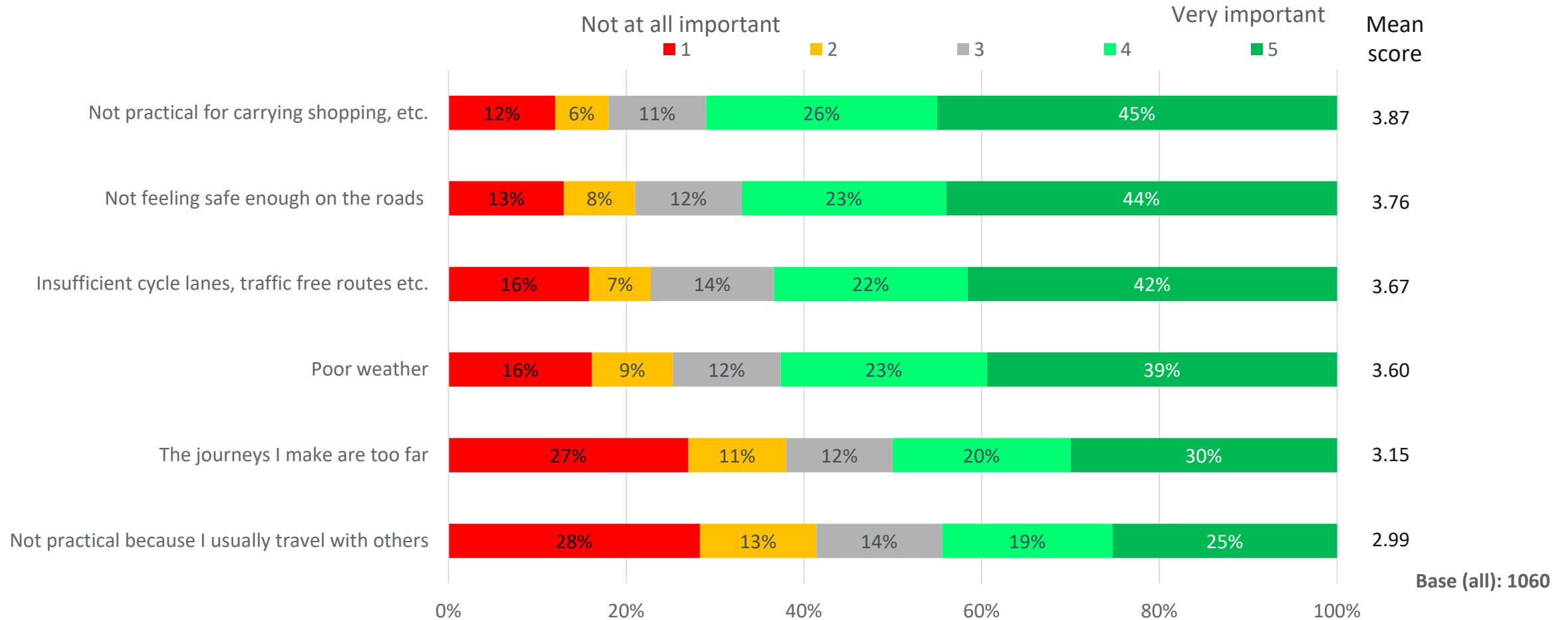


Attitudes to cycling

Barriers to cycling



Importance of barriers to cycling for everyday journeys



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.

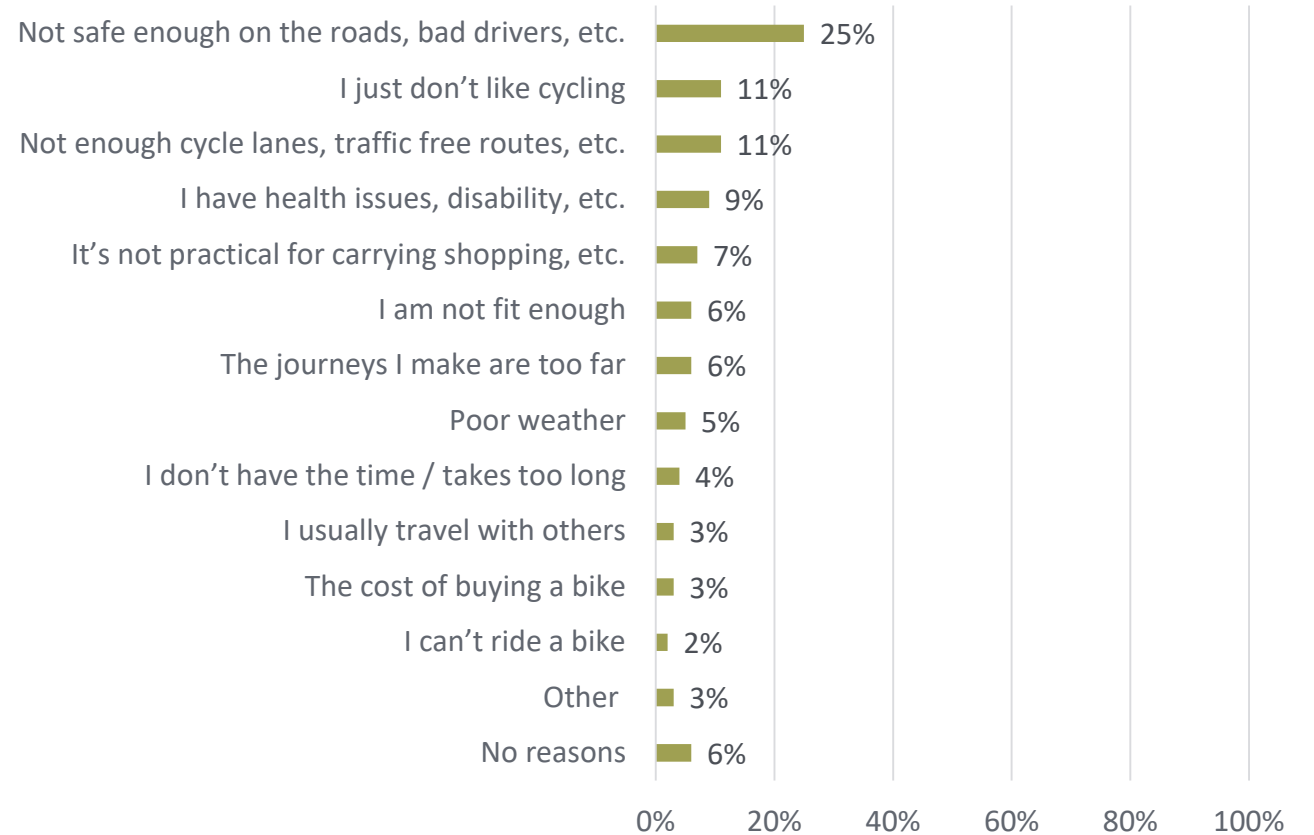
Attitudes to cycling

Key barrier to cycle

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

Base (All): 1,060

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



Cycling Scotland

Registered Charity No. SCO29760

Segmentation analysis

Defining characteristics

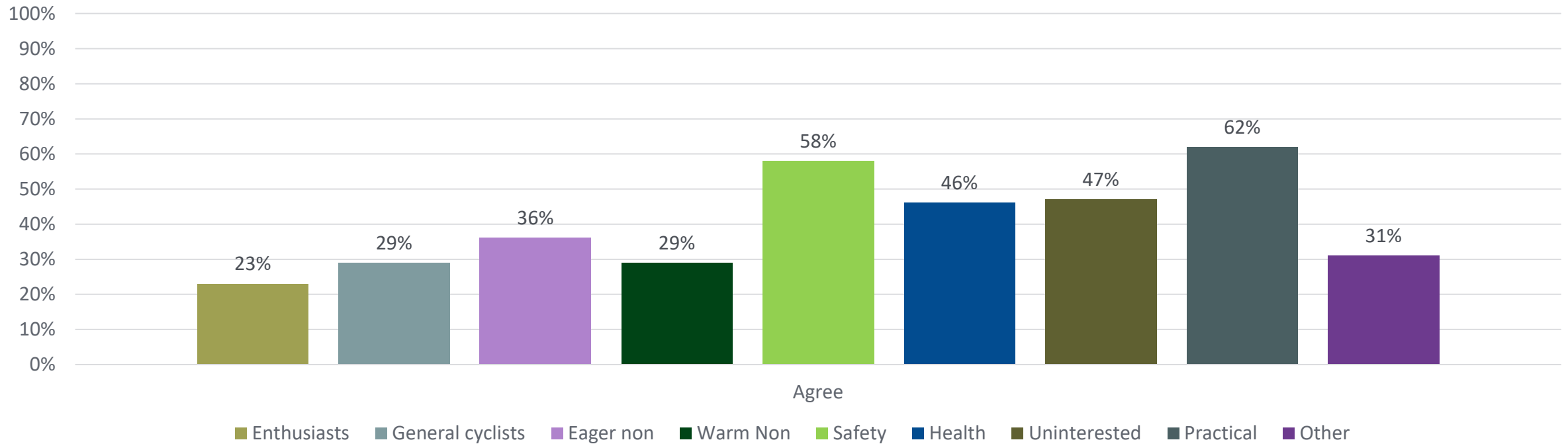


Segment	Defining characteristics	% of sample	
Cycling Enthusiasts	Cycle for transport or leisure <u>at least</u> 2 or 3 times a month	17%	} 27% cyclists
General Cyclists	Cycle for transport or leisure <u>less than</u> 2 or 3 times a month	10%	
Eager Non-cyclists	Currently never cycle, but <u>high propensity</u> to cycle in next 5 years	9%	} 16% contemplators
Warm Non-cyclists	Currently never cycle, with <u>moderate</u> propensity 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%	} 57% rejecters
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%	

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)

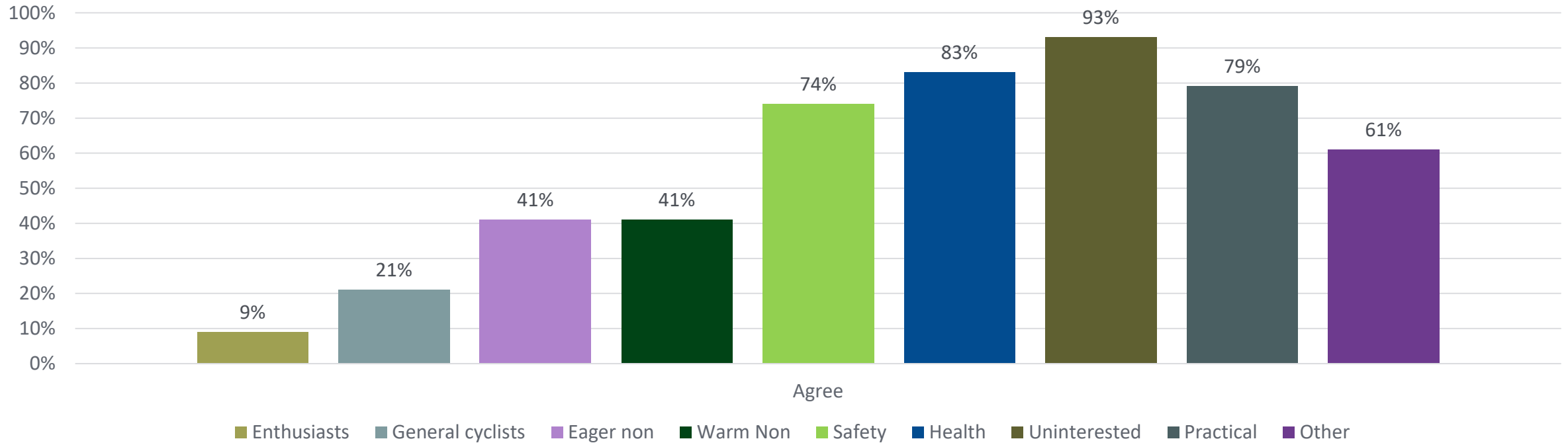
Cycling Scotland

Registered Charity No. SCO29760

Segments



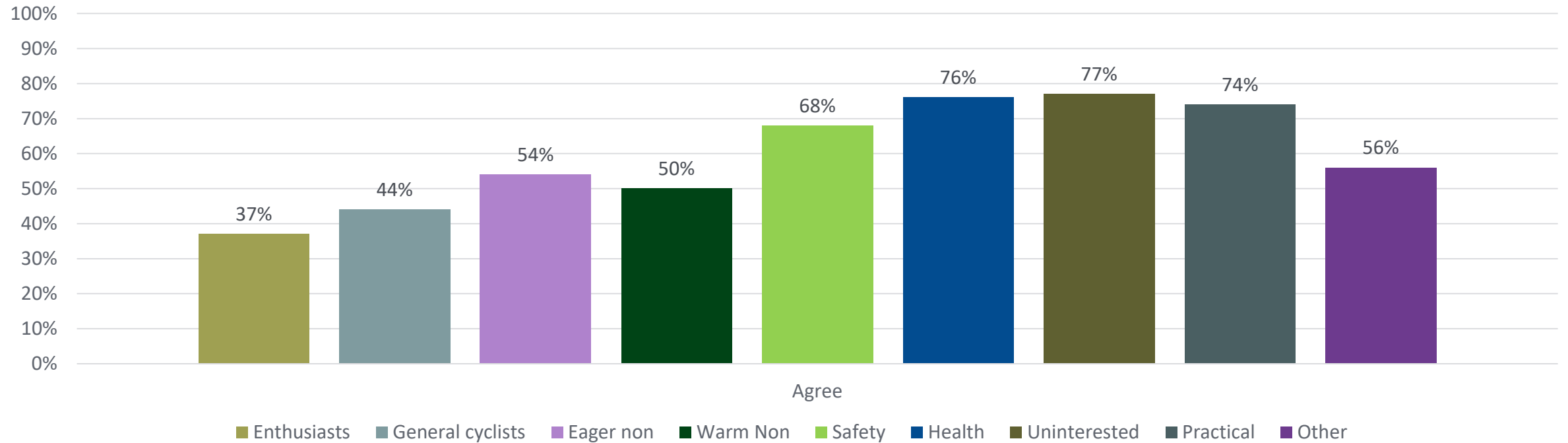
I am not the kind of person who rides a bike



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



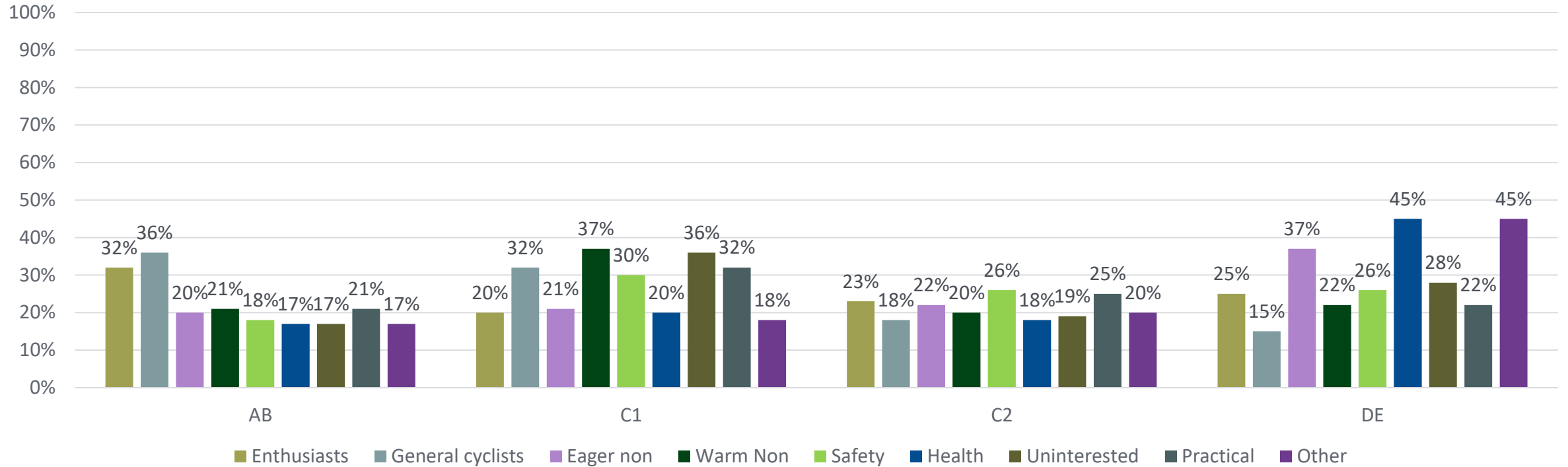
Base (all): Enthusiasts (178); General Cyclists (107); Eager Non-cyclists (95); Warm Non-cyclists (76); Safety Rejecters (172); Health Rejecters (138); Uninterested Rejecters (113); Practical Rejecters (110); Other Rejecters (71)

Cycling Scotland

Registered Charity No. SCO29760

Segments

Socio-economic group



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)

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

Behaviour

- 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.

Attitudes

- Attitudes towards cycling in general are positive. The majority of people agree that cycling is good for Scotland and the environment.
- 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.
- 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.