Cycling Scotland

Attitudes and Behaviours Towards Cycling in Scotland

9th October 2019

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

Progressive undertook an initial wave of research during August/September 2017, which has been replicated in 2019 to add to data gathered in the first wave of research and track and explore changes over time.

Project objectives

- **Methods of transport**
  - Methods used for everyday journeys
  - Reasons for choices
  - Types of journey
- **Cycling behaviours**
  - Frequency for everyday journeys
  - Reasons for choosing cycling
  - Types of journey
  - Frequency for leisure and sport
  - Types of cycling
- **Attitudes towards cycling**
  - General views on cycling
  - Motivations and barriers
  - Propensity to increase cycling
  - Perceived safety for children cycling
- **Impact of other factors on cycling**
  - Impact of life events
  - Impact of influential people
  - Impact of cycling events

Method

Data was gathered using face-to-face in-street CAPI interviews

Wave 1	Wave 2
1060 interviews were conducted	1049 interviews were conducted
Each interview was approximately 13 minutes long	Each interview was approximately 13 minutes long
The sample was gathered from across Scotland. Almost all Scottish local authorities were included	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	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	Fieldwork was conducted between 26th August And 22nd September 2019
The margin of error on a sample of 1060 is between +/- 0.6% and +/- 3.0% at the 95% confidence interval.*	The margin of error on a sample of 1049 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.

Data Analysis

Only **statistically significant** differences are reported

Statistically significant differences between waves of research on charts are noted with ⬆ or ⬇

Where base sizes are low a caution ⚠ sign is shown. **These results must be read with caution**

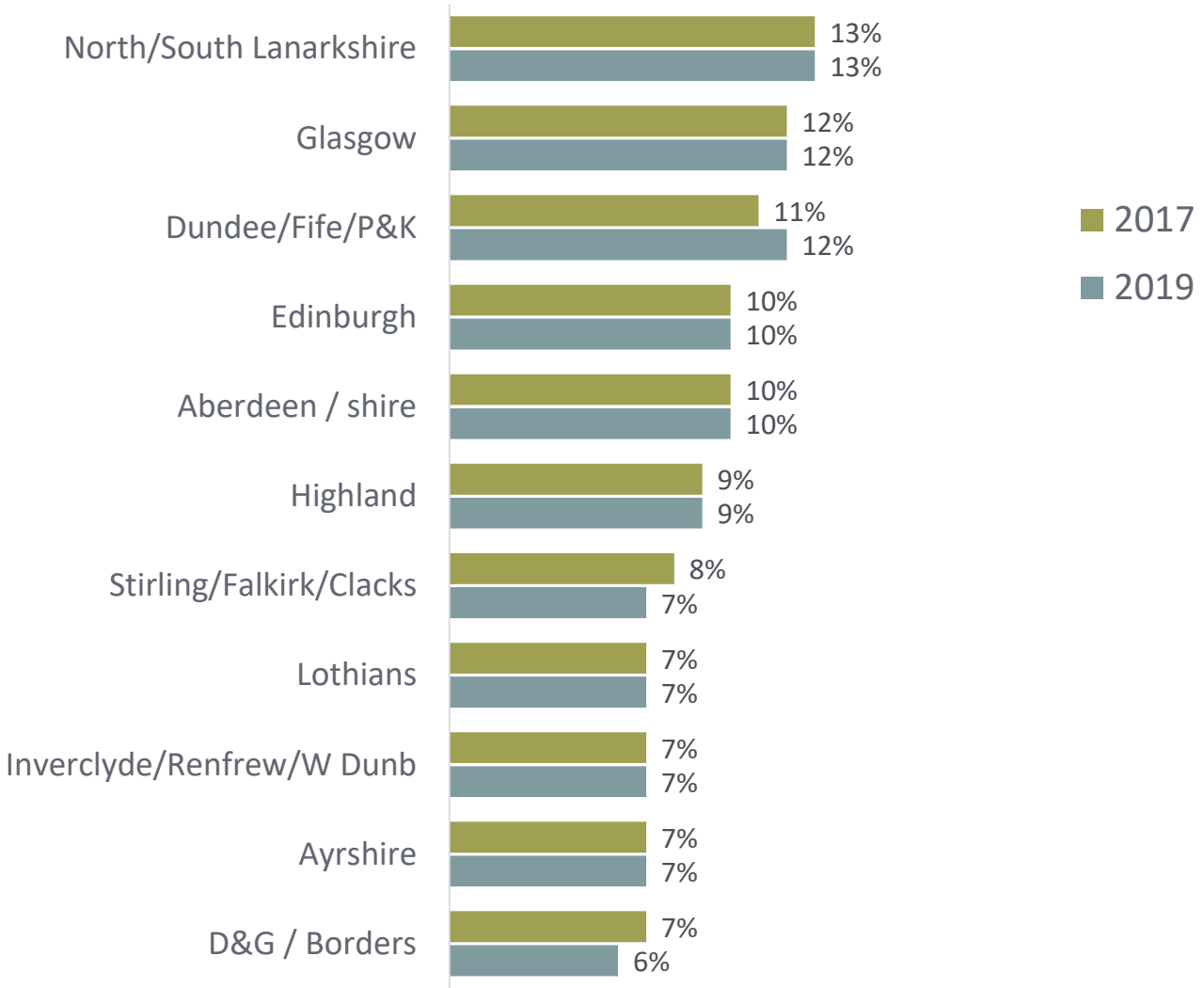
Where figures do not add to 100% this is due to multi-coded responses or rounding

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.
- 2017 and 2019 samples very closely matched.

Local authority

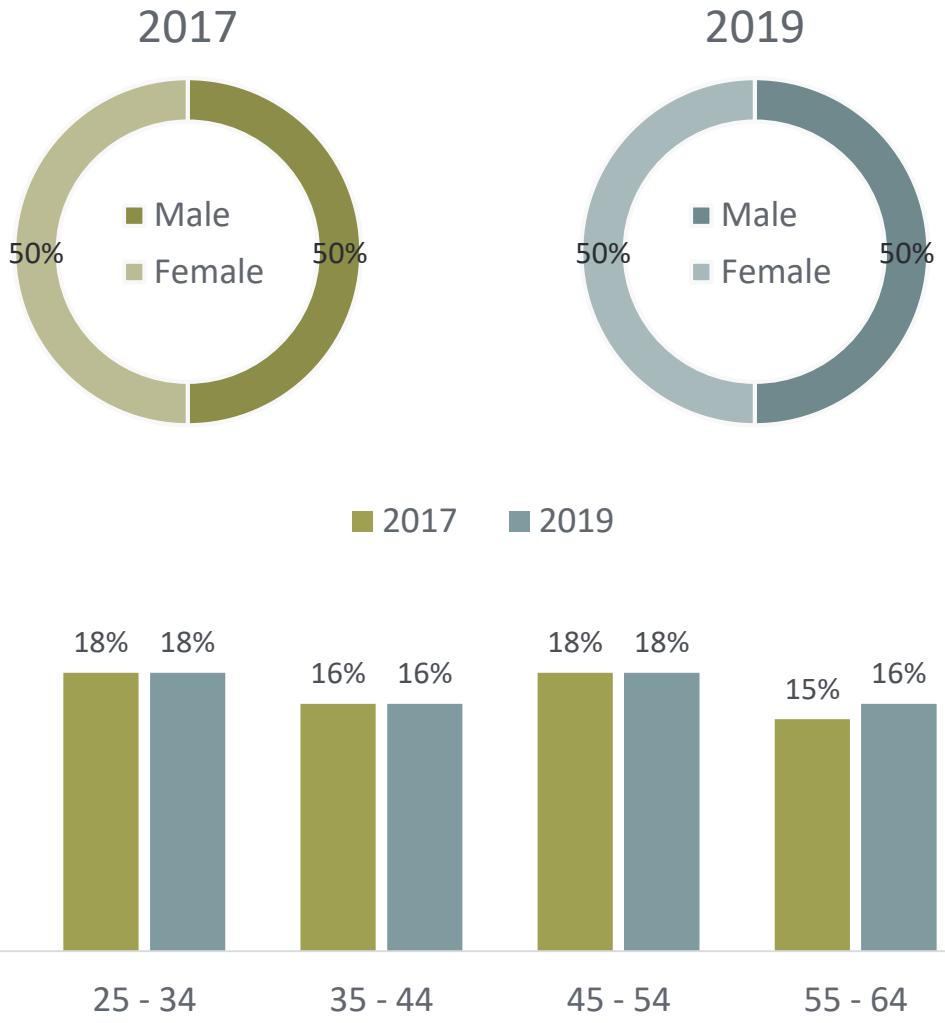


Base (all) 2017: 1060, 2019: 1049

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 for both waves of research.
- A representative spread of age groups was also included in the sample at each wave of research.

Age and gender profile of samples representative of Scotland statistics

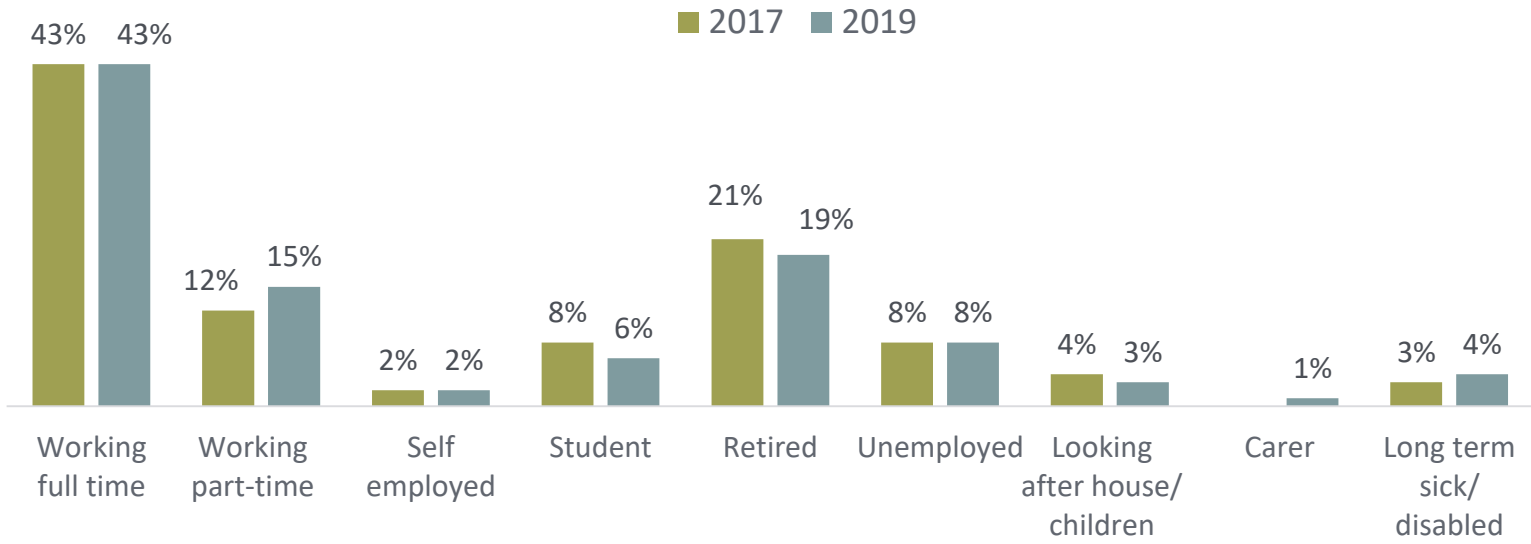


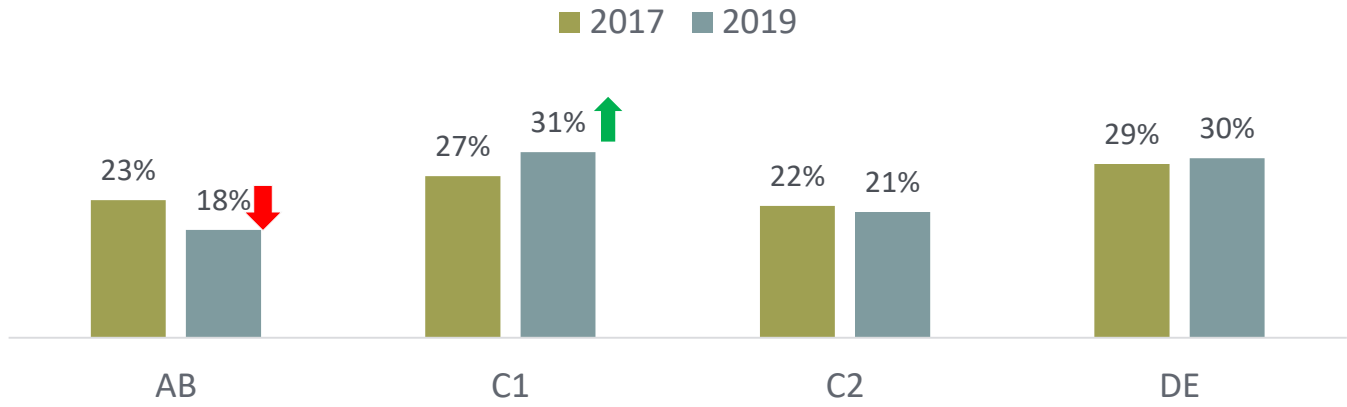
Base (all) 2017: 1060, 2019: 1049

Sample profile
Socio-economic

- Quotas were also set on socio-economic group – approx. 50% ABC1; 50% C2DE.
- The 2019 sample's socio-economic profile had a slightly lower proportion in AB and higher proportion in C1 compared to 2017. Both samples are broadly representative of Scottish population statistics (AB 19%, C1 32%, C2 22%, DE 28%).
- 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.
- There were no significant differences in the working status profile between 2017 and 2019.

Working status and SEG



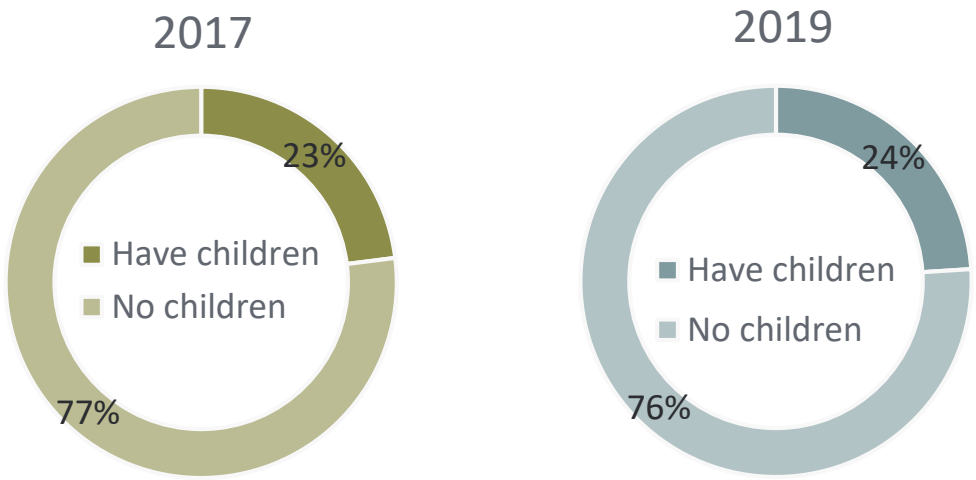


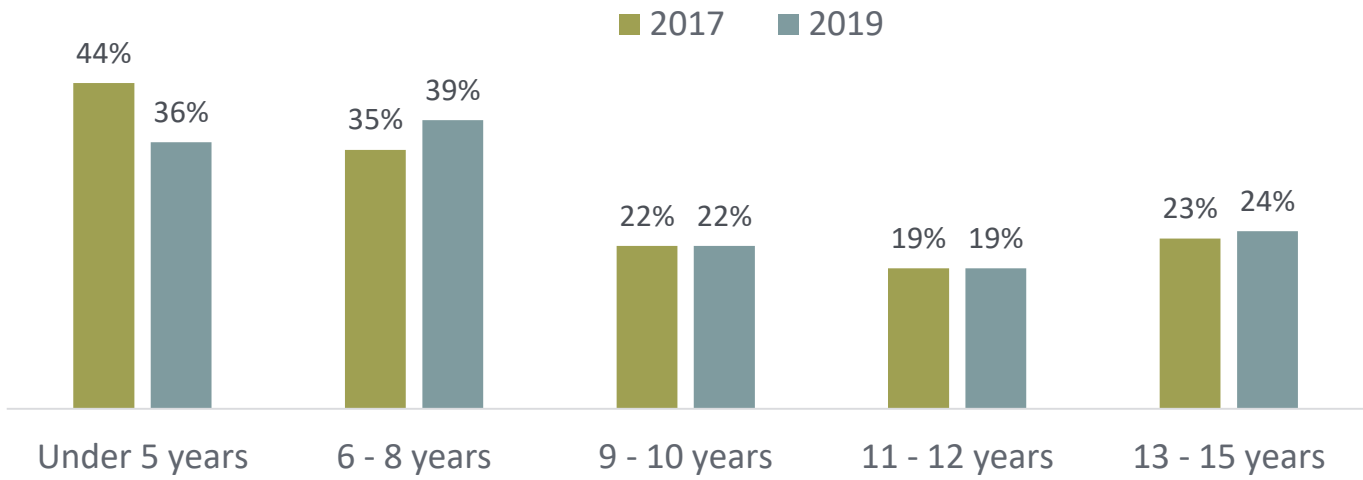
Base (all) 2017: 1060, 2019: 1049

Sample profile
Children

- Almost one quarter of respondents at both waves had children under 16 years old in the household.
- The ages of children were skewed to younger age groups. No significant differences between 2017 and 2019.
- 71% of parents in 2017 and 77% in 2019 had children aged between 6 and 15 years old – and therefore have potential to cycle.

Children in household





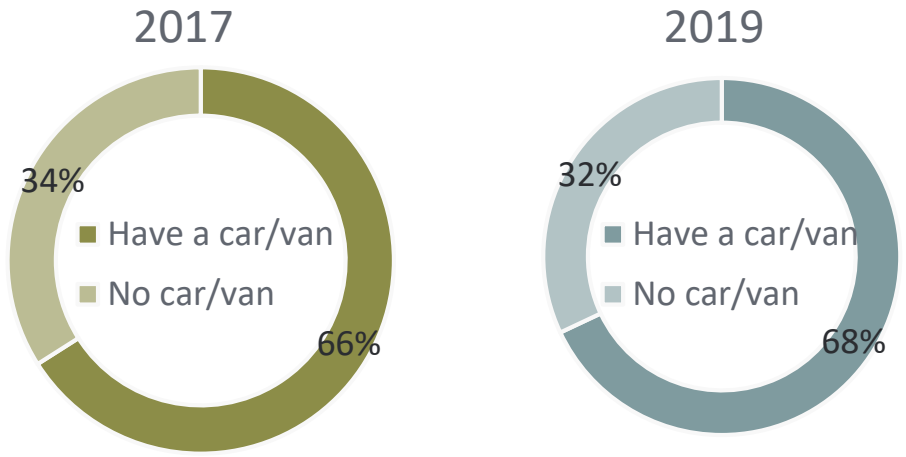
Base (all) 2017: 1060, 2019: 1049
Base (all with children) 2017: 248, 2019: 249

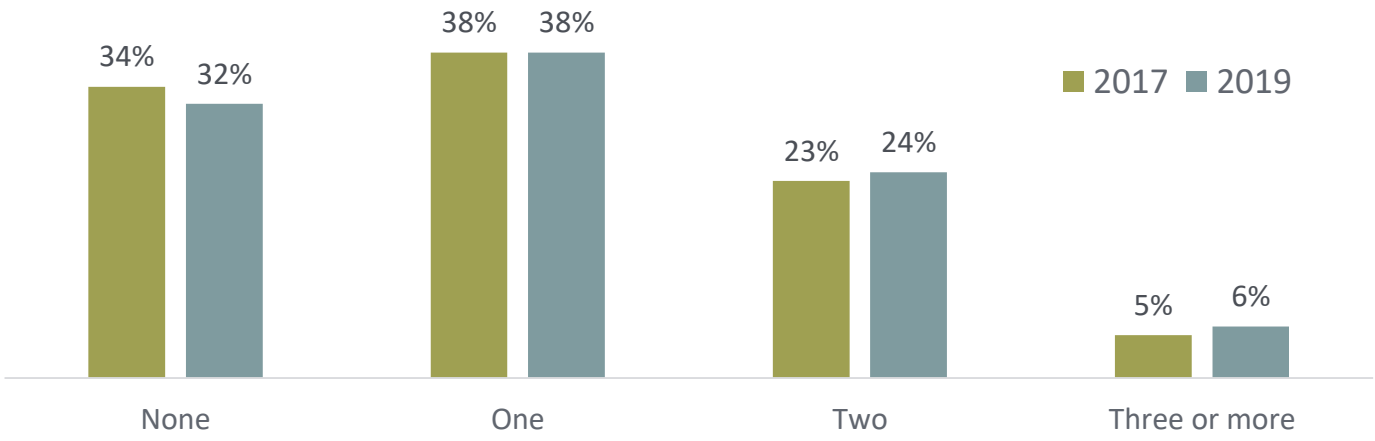
Sample profile
Car ownership

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

Q26: How many cars or vans do you own, or are available for use, in your household?

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



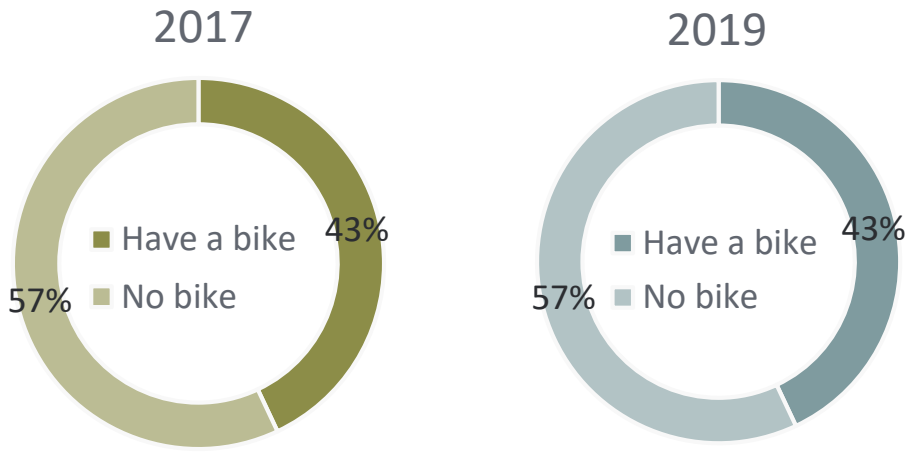


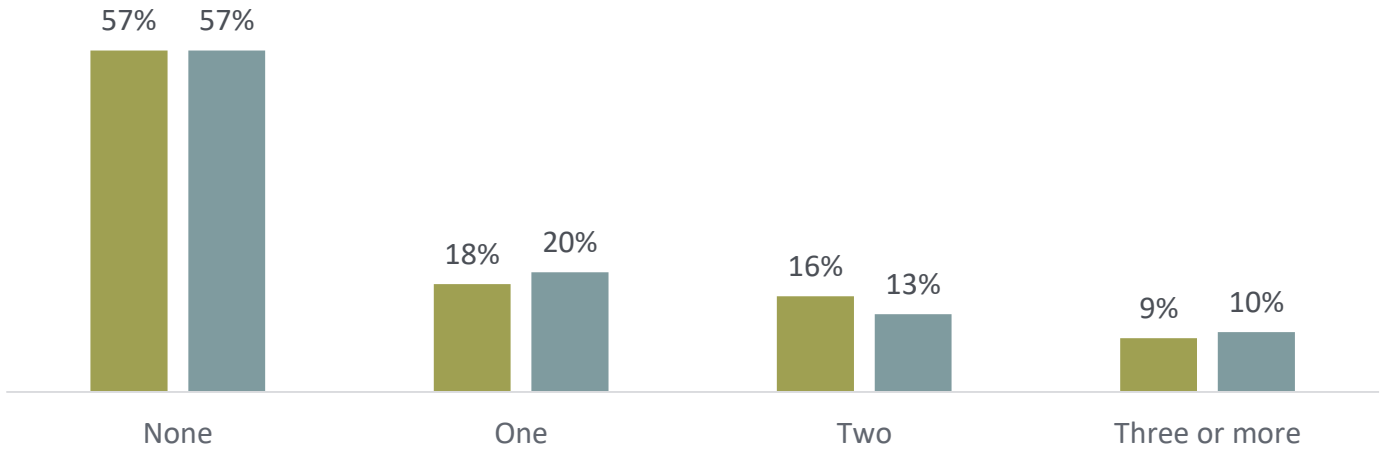
Base (all) 2017: 1060, 2019: 1049

Sample profile
Bicycle ownership

- 43% of respondents in both 2017 and 2019 reported having access to an adult bike in their household.

How many bikes available for use in your household?





Q25: How many adult bicycles do you own, or are available for use in your household?

Base (all) 2017: 1060, 2019: 1049

Summary

- We have interviewed a robust and representative sample of the Scottish population in both 2017 and 2019.
- This provides a sound basis for top line data analysis, as well as various sub-groups for sub-sample analysis.
- Consistency in samples between 2017 and 2019 also provides a strong basis for year to year comparisons.

Transport choices

Transport choices

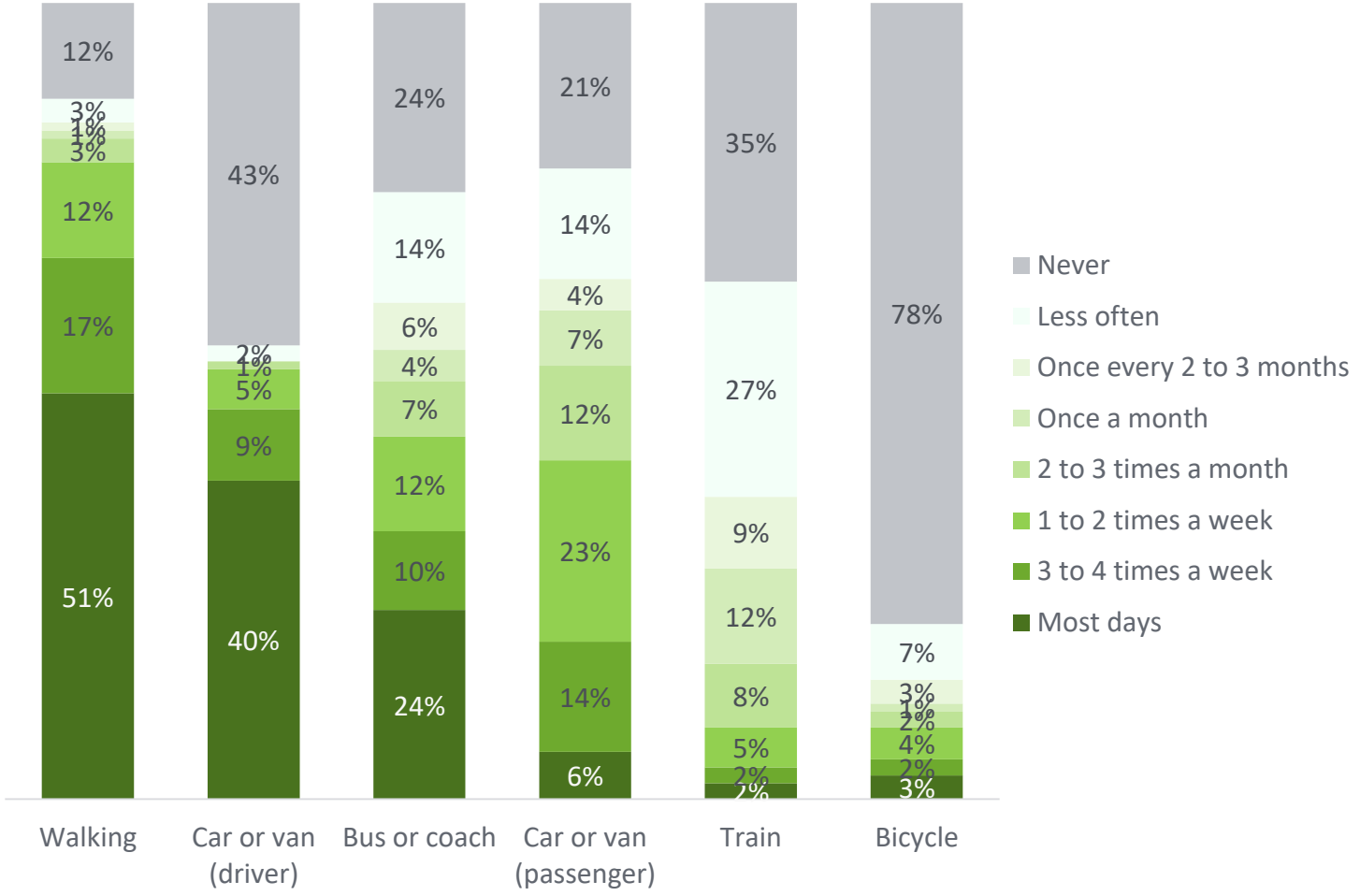
Frequency

- Walking was the most frequent mode for everyday journeys - 80% walk at least once a week, with half walking most days.*
- 57% of respondents reported that they ever drive, with 40% driving most days.
- Around three quarters ever use a bus or coach, with 46% travelling by bus at least once a week.
- 22% of population ever cycle for everyday journeys. 9% cycle for everyday journeys at least once a week.
- Those most likely to ever cycle for journeys were males (26%, females 18%), under 55 year olds (28%, over 55s 11%), and ABs (31%, C1s 24%, C2s 20%, DEs 15%).
- Males were more likely to cycle at least once a week (13%) compared to females (6%).

*Data for walking may be higher than population as a whole as survey was conducted in-street and did not capture responses from house bound people.

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): 1049

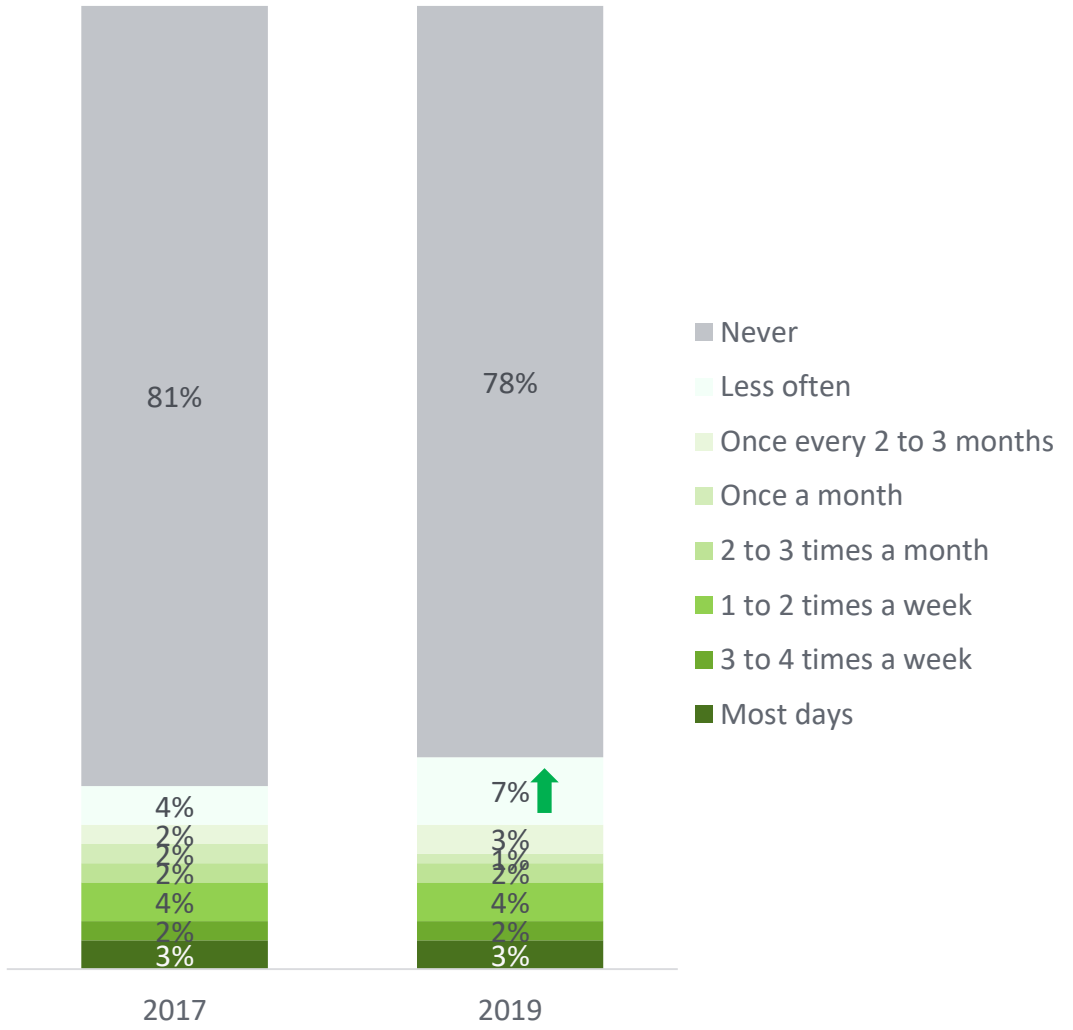
Transport choices

Frequency

- The proportion of people cycling for everyday journeys is consistent between 2017 and 2019, apart from an increase on those stating less often than once every 2 to 3 months.
- Although the overall proportion cycling for everyday journeys is consistent between 2017 and 2019, the proportion of females cycling has increased – from 12% in 2017 to 18% in 2019.

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 cycling for everyday journeys

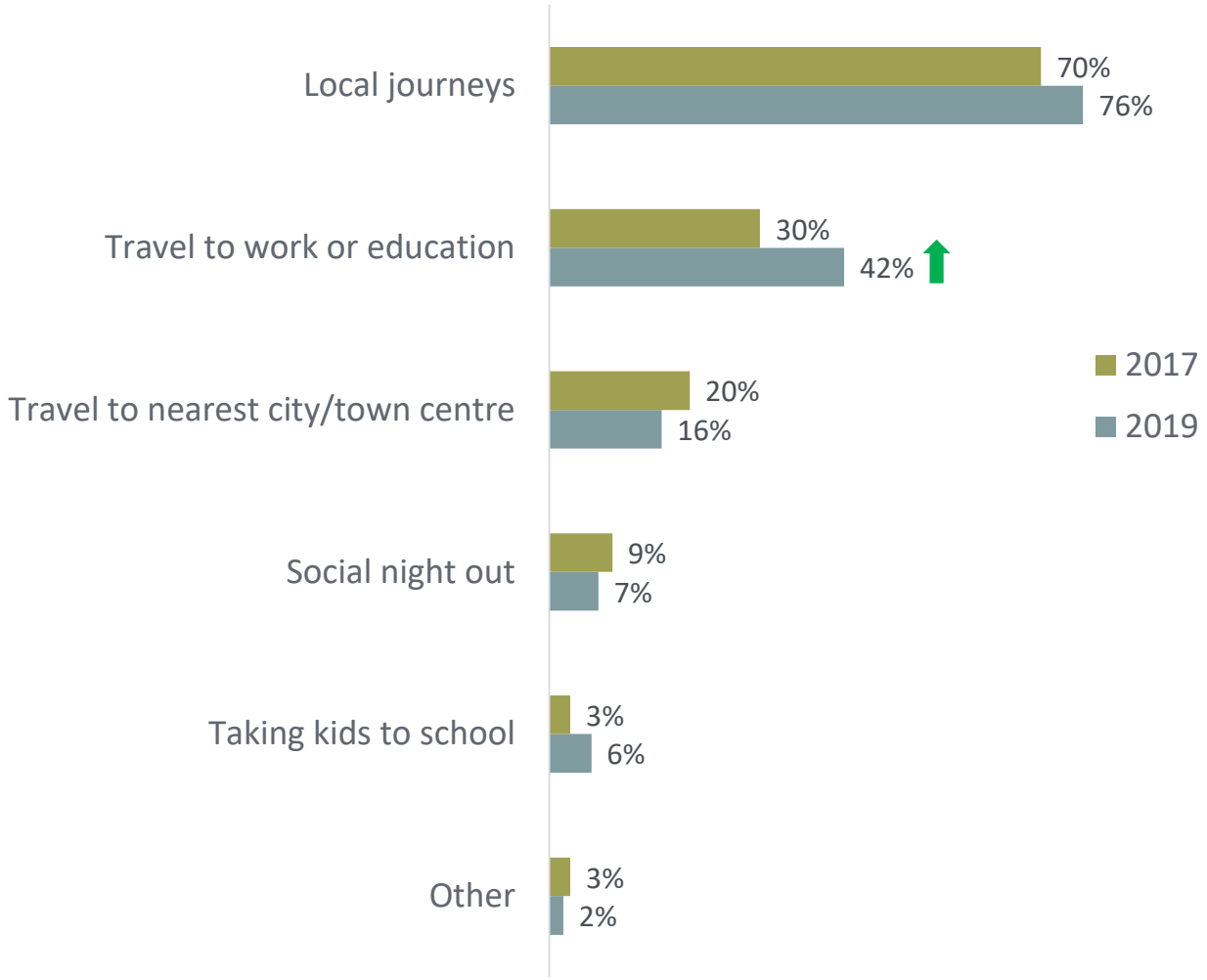


Base(all): 2017: 1060; 2019: 1049

Transport choices
Journey types

- 12% of the sample cycle for everyday journeys at least once a month (13% in 2017).
- Consistently across both waves of research, cycling is predominantly used for local journeys – 70% in 2017 and 76% in 2019
- Whilst there has been an increase in the proportion of people who cycle for everyday journeys who commute by bike – from 30% to 42% - as a proportion of the total sample the figure is consistent – 4% in 2017 and 5% in 2019.

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



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

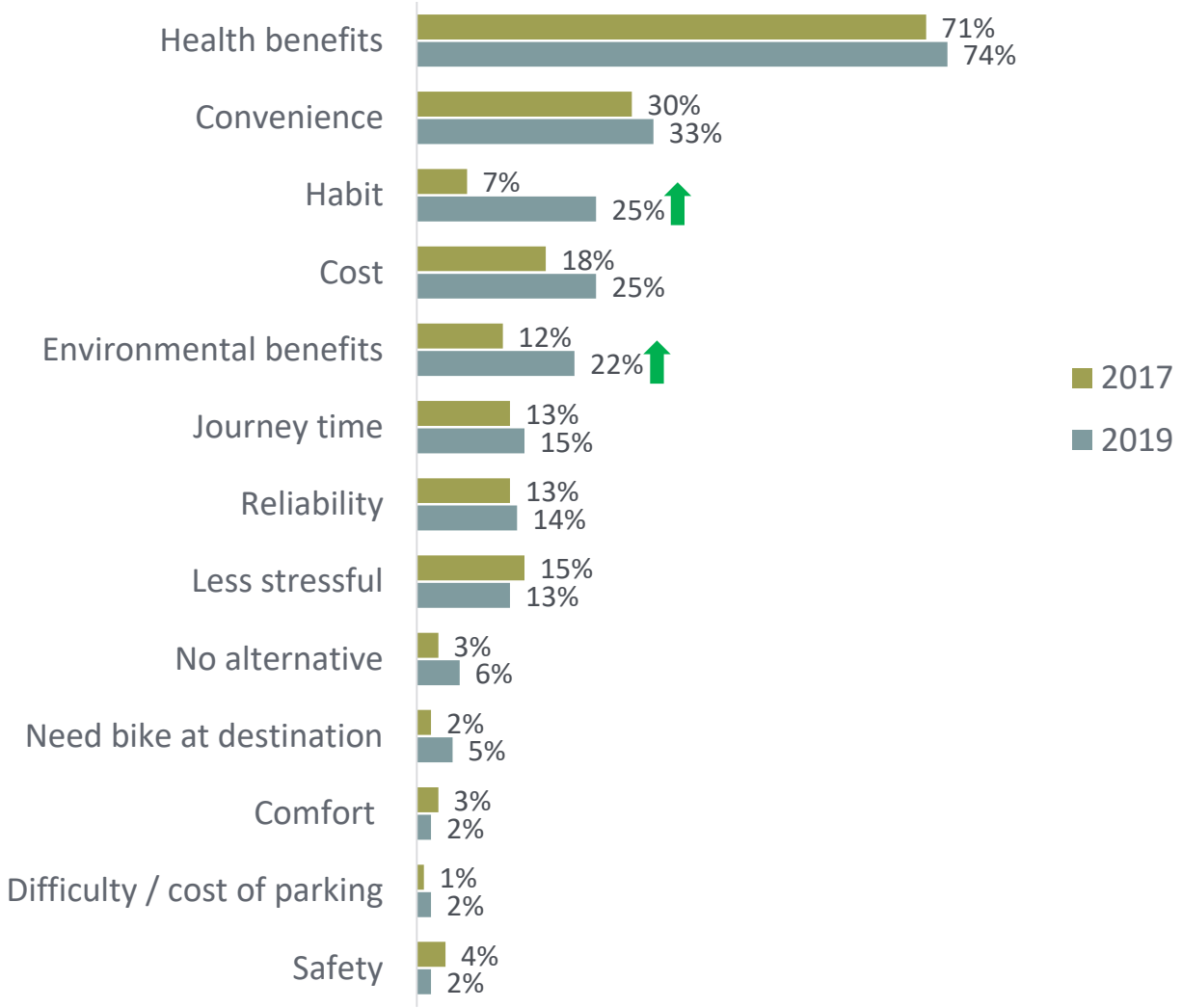
Base (all bicycle) 2017: 137, 2019: 130

Transport choices
Reasons

- The overwhelming reason for cycling for everyday journeys is to improve health. This was mentioned by almost three quarters of people who cycle in both 2017 and 2019.
  - The older the respondent, the more likely they were to mention health benefits (91% of 55+; 60% of under 35s).
- Almost one third of people who cycle also mentioned convenience – again this was consistent between 2017 and 2019.
- One quarter cycle because it is a less expensive option or simply out of habit.
- A variety of other benefits was mentioned by the sample, including less stressful, journey time and reliability.
- Significantly, people who cycle were more likely to mention the environmental benefits of their choice of transport (22%) than people using any other transport type, and this has increased significantly since 2017 (12%). Female respondents were more likely to mention environmental reasons (39%) than males (12%).

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) 2017: 137, 2019: 130

Key insights

Transport choices

- As we found in 2017, in 2019 non-active transport options tend to be chosen primarily for convenience and journey time.

- Cycling and walking were most often selected for local journeys and for health benefits. Convenience was the key secondary reason.

- Cycling is the only travel mode which is chosen by a significant proportion for environmental reasons – 22% in 2019. The proportion of people choosing to cycle for environmental reasons has increased since 2017.

- Just over one in five (22%) ever cycle for everyday journeys and one in ten regularly cycle for everyday journeys (at least once a week) – these figures are consistent between 2017 and 2019.
  - The proportion who ever cycle for journeys is higher for some sub-groups – males (26%), ABs (31%), under 55s (28%).

Attitudes to driving

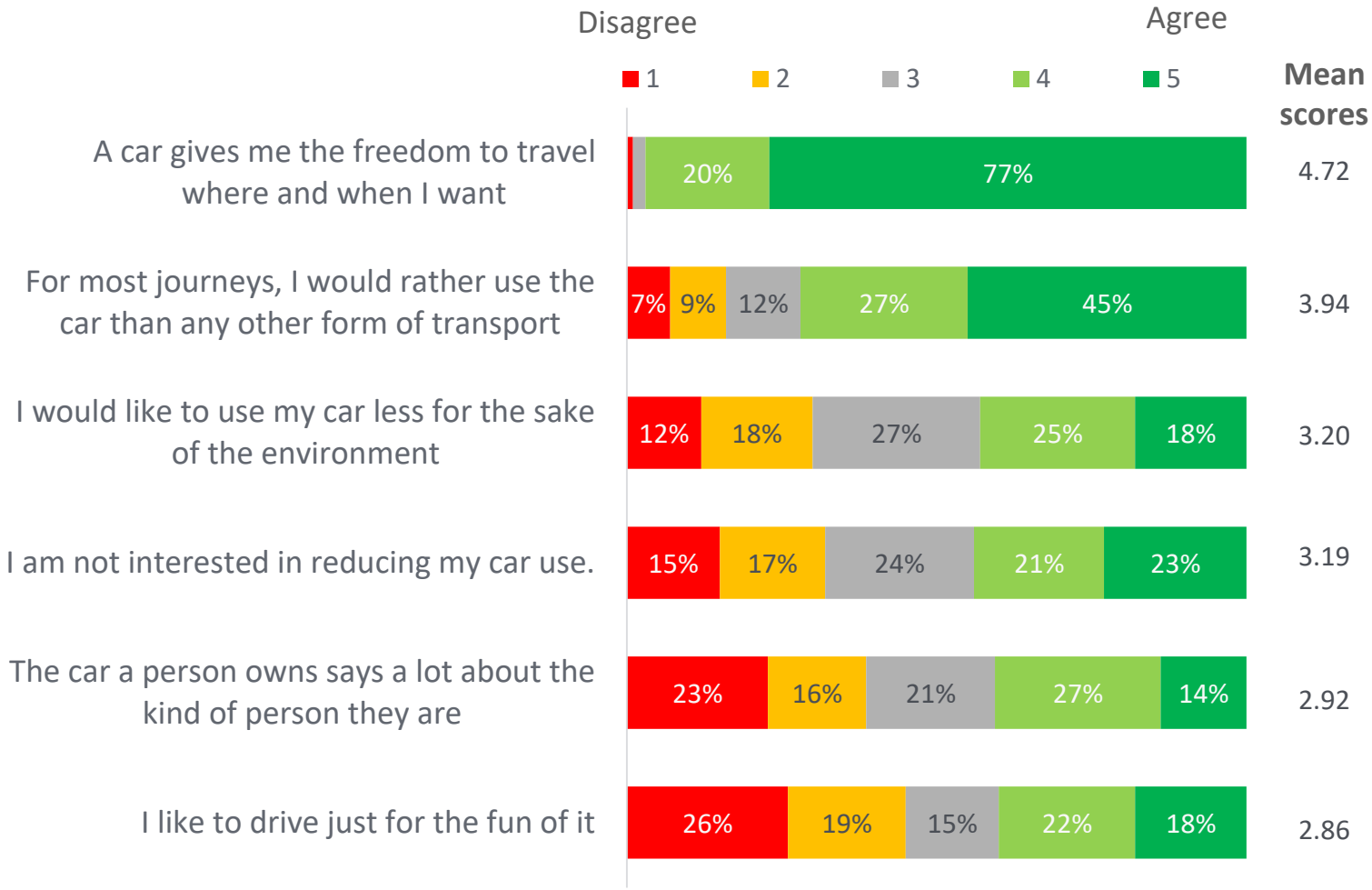
Attitudes to driving

- Reflecting the data gathered in 2017, in 2019 the majority of drivers seem committed to their car.
  - 97% agree that it gives them freedom to travel where and when they want
  - Almost three quarters agree that they would rather use it than any other form of transport
  - 44% agree that they are not interested in reducing their car use

- However, there is again a significant minority who would like to use their car less.
  - 43% would like to use it less for the sake of the environment
  - 32% disagree that they are not interested in reducing their car use

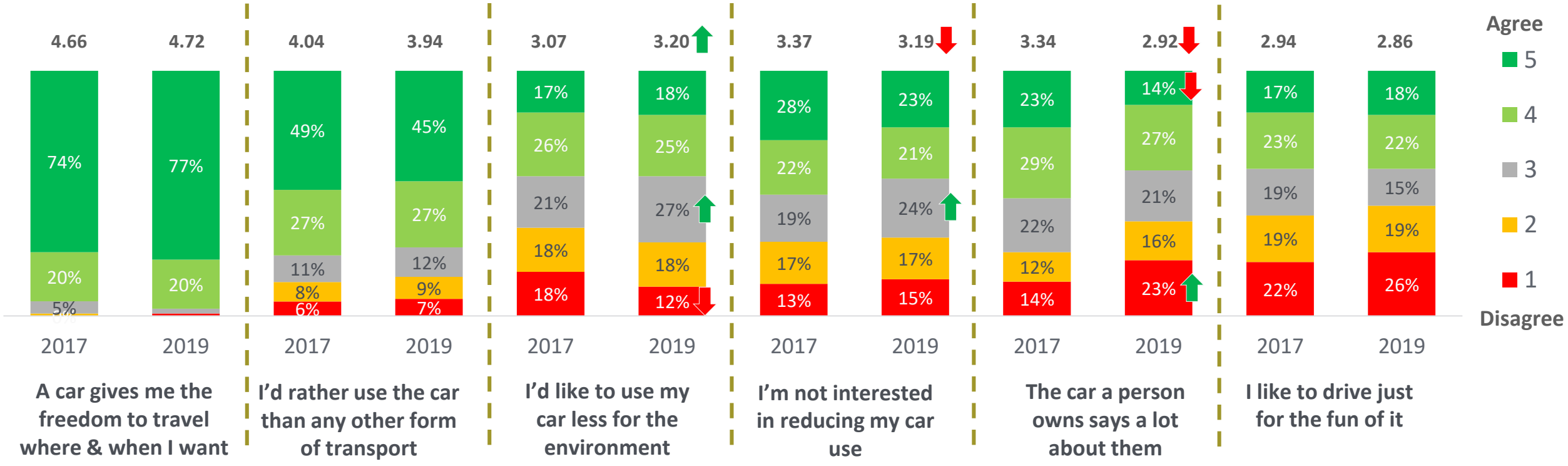
Q4: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Whilst the car offers drivers freedom, a significant minority would like to use it less for environmental reasons



Base (all drivers): 573

Attitudes to driving



- Whilst agreement with many of the drivers statements was consistent between 2017 and 2019, some key differences were noted.
  - There has been a reduction in the proportion who disagreed strongly that they'd like to use their car less for the sake of the environment (agreement was consistent)
  - Fewer overall agreed that they are not interested in reducing their car use – 50% in 2017 to 44% in 2019.
  - Fewer agreed strongly and more disagreed strongly that the car a person owns says a lot about them

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.

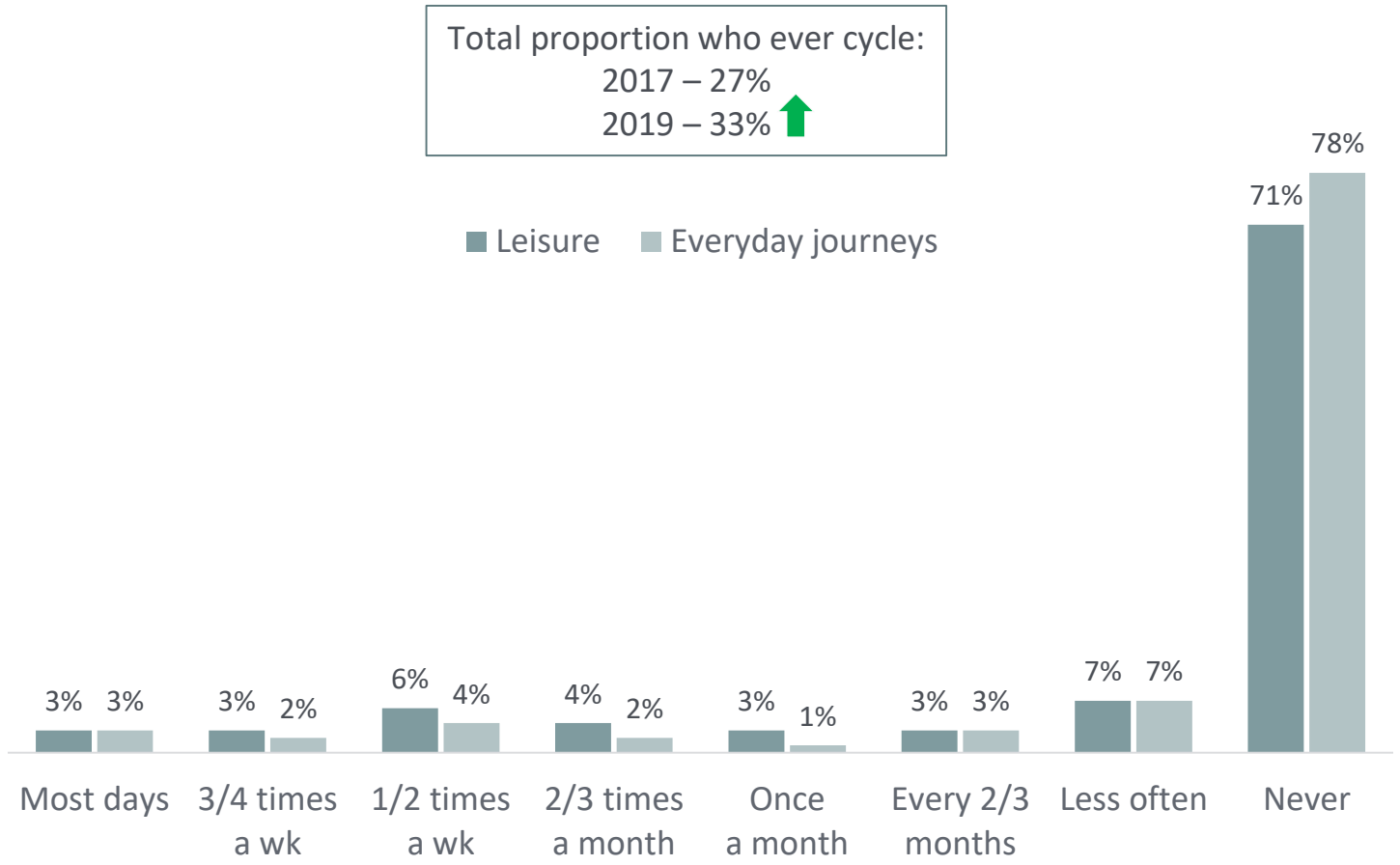
Base (all) 2017: 546, 2019: 573

Cycling behaviours

Cycling behaviours
Frequency

- In total 29% of respondents cycle for leisure and 22% cycle for everyday journeys at least occasionally.
- Combining both questions, 33% of the population ever cycle either for transport or leisure. This represents an increase since 2017 (27%).
- Just over one tenth of the population cycle at least once a week.
- People who cycle are most likely to be:
  - Males (39%, compared to 27% females)
  - Under 55 year olds (41%, compared to 17% 55+)
  - AB socio-economic group (46%, compared to 20% DEs)
  - Drivers (35%, compared to 29% non-drivers)

In 2019 one third of people cycle – an increase since 2017



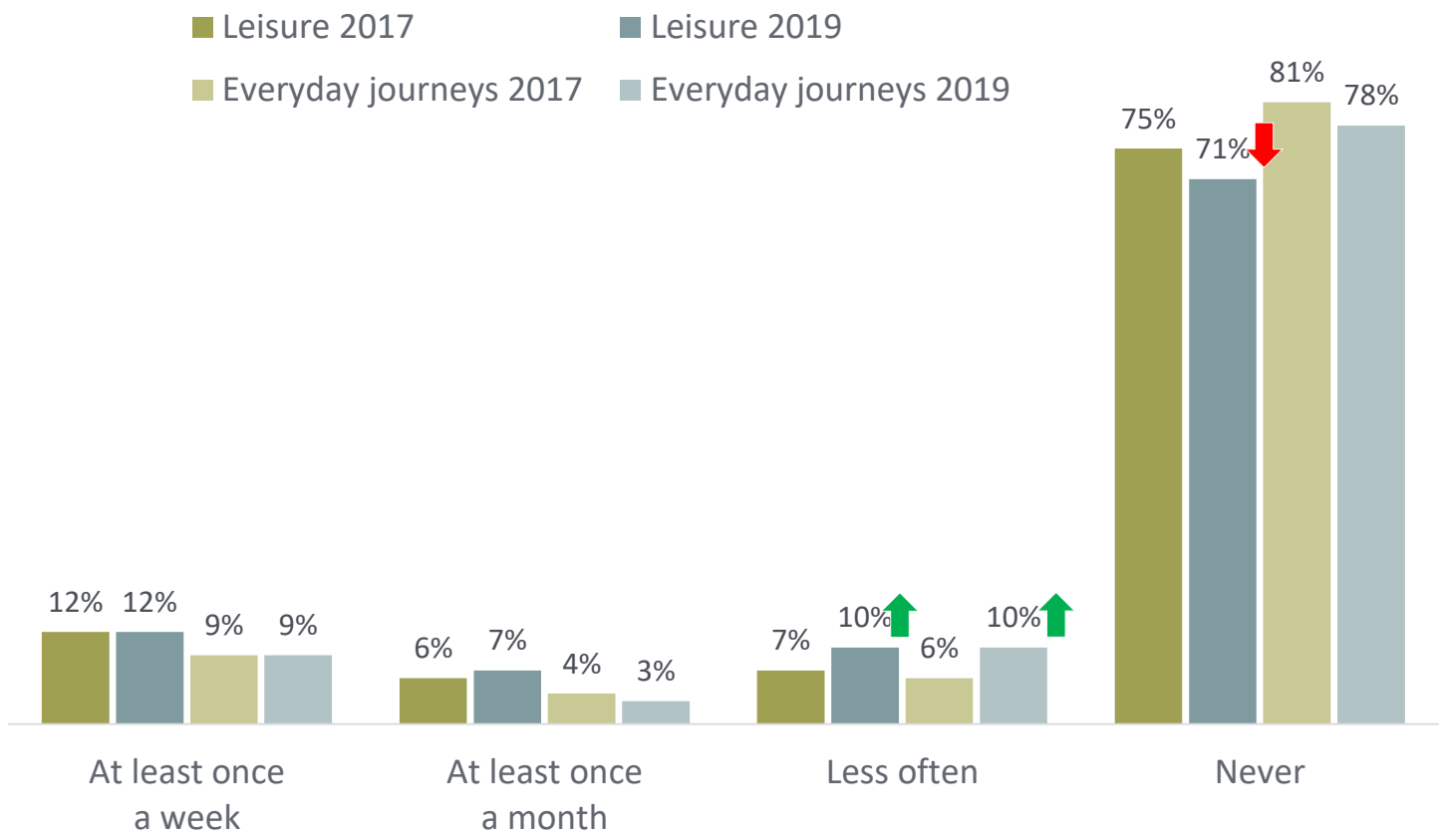
Q1: How often do you use the following modes of transport for journeys? Q6: How regularly do you tend to cycle for leisure or sport?

Base (all): 1049

Cycling behaviours
Frequency

- Whilst the data suggests the proportion of people cycling for journeys has remained fairly stable between 2017 and 2019, there has been an increase in those cycling for leisure – from 25% to 29%.
- The highest increases were seen in those who cycle less than once a month.

There has been an increase in people cycling for leisure between 2017 and 2019



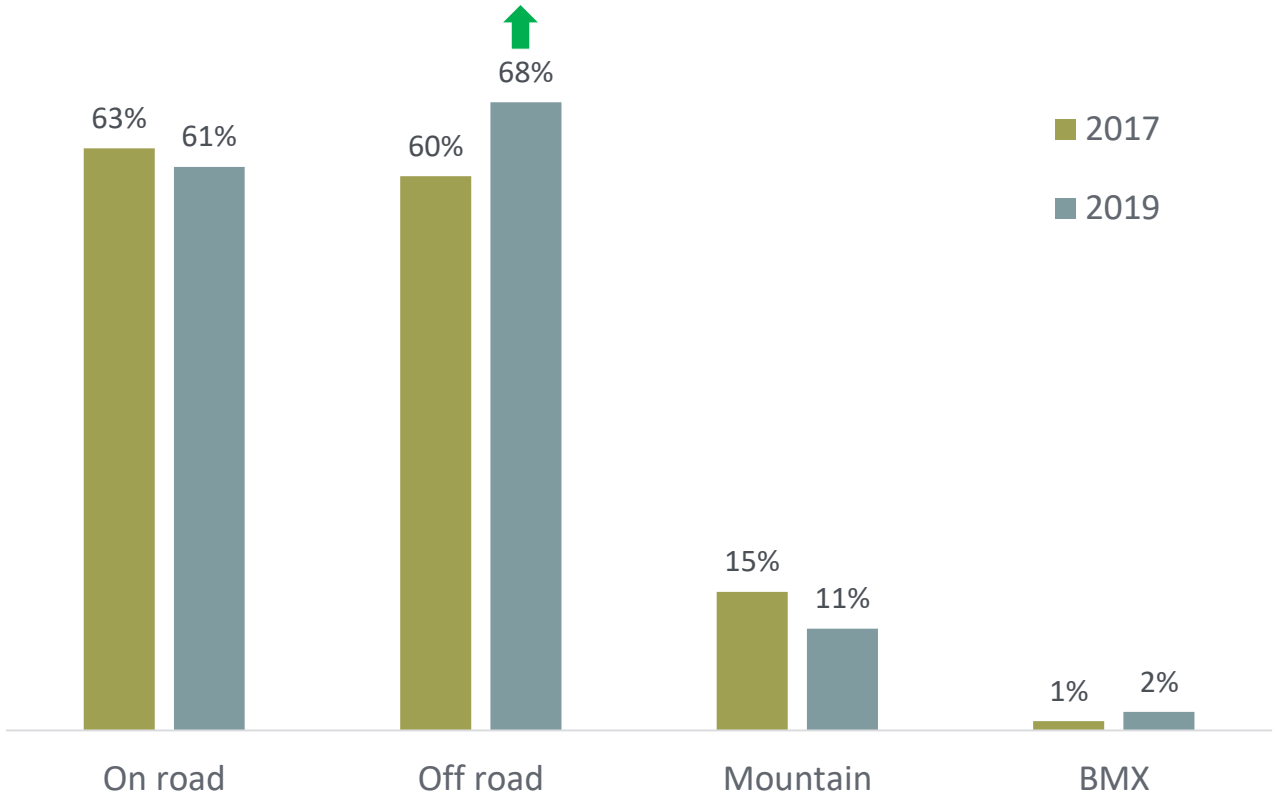
Q1: How often do you use the following modes of transport for journeys? Q6: How regularly do you tend to cycle for leisure or sport?

Base (all) 2017: 1060, 2019: 1049

Cycling behaviours
Types of cycling

- Of those who cycle for leisure, most cycle both on roads and off-road.
- There has been an increase in the proportion of people who reported that they like to cycle off roads in 2019 (68%) compared to 2017 (60%).

The majority of people who cycle do so both on-road and off-road



Q7: What types of cycling do you do?

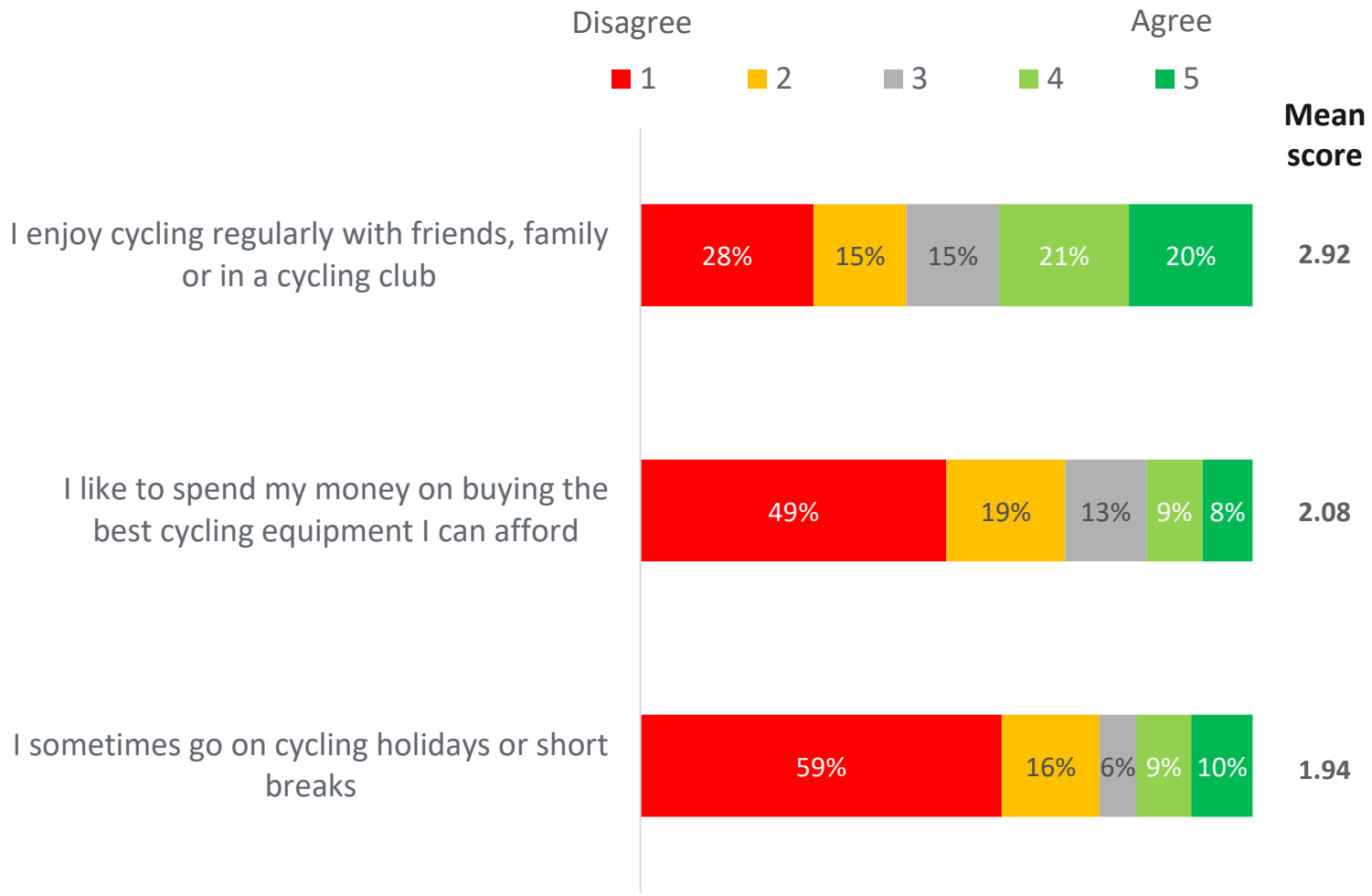
Base (all people who cycle) 2017: 267, 2019: 305

Cycling behaviours
Behavioural statements

Around 1 in 5 were cycling enthusiasts – buying the best equipment and going on cycling holidays

- Amongst the people in the sample who cycle, opinion was split on whether cycling is an activity that is enjoyed with family, friends or in a cycling club – 42% agreed and 43% disagreed.

- Just less than one in five people who ever cycle could be described as enthusiasts:
  - 18% agreed they like to spend their money on the best equipment
  - 19% agreed that they go on cycling holidays

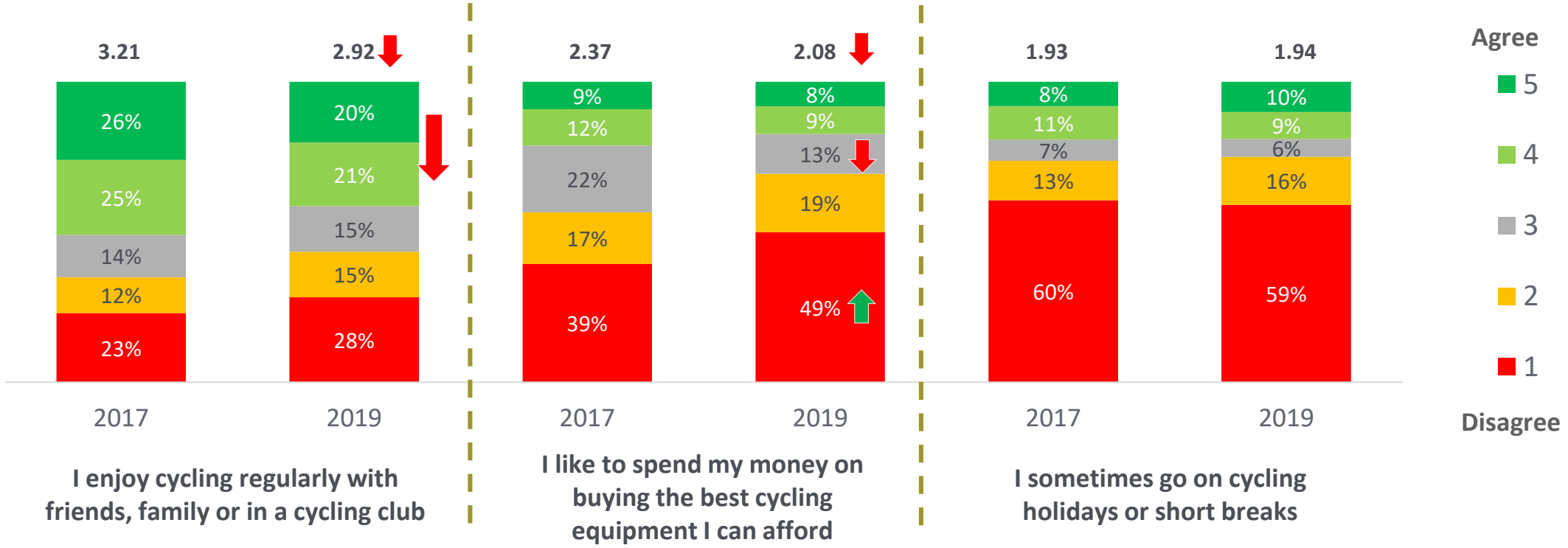


Q8: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Base (all people who cycle): 342

Cycling behaviours

The proportion of cycling enthusiasts is similar in 2017 and 2019 – around 1/5



- Fewer people who cycle in 2019 reported that they enjoyed cycling regularly with friends, family or in a cycling club (42%) compared to 2017 (51%).
- There was an increase in those disagreeing that they like to spend their money on the best cycling equipment they can afford – 56% in 2017 to 69% in 2019.
- The proportions agreeing and disagreeing with the statement 'I sometimes go on cycling holidays or short breaks' was consistent.
- Overall, around one fifth of the people who reported that they ever cycle agreed with the 'enthusiasts' statements in both waves of the research.

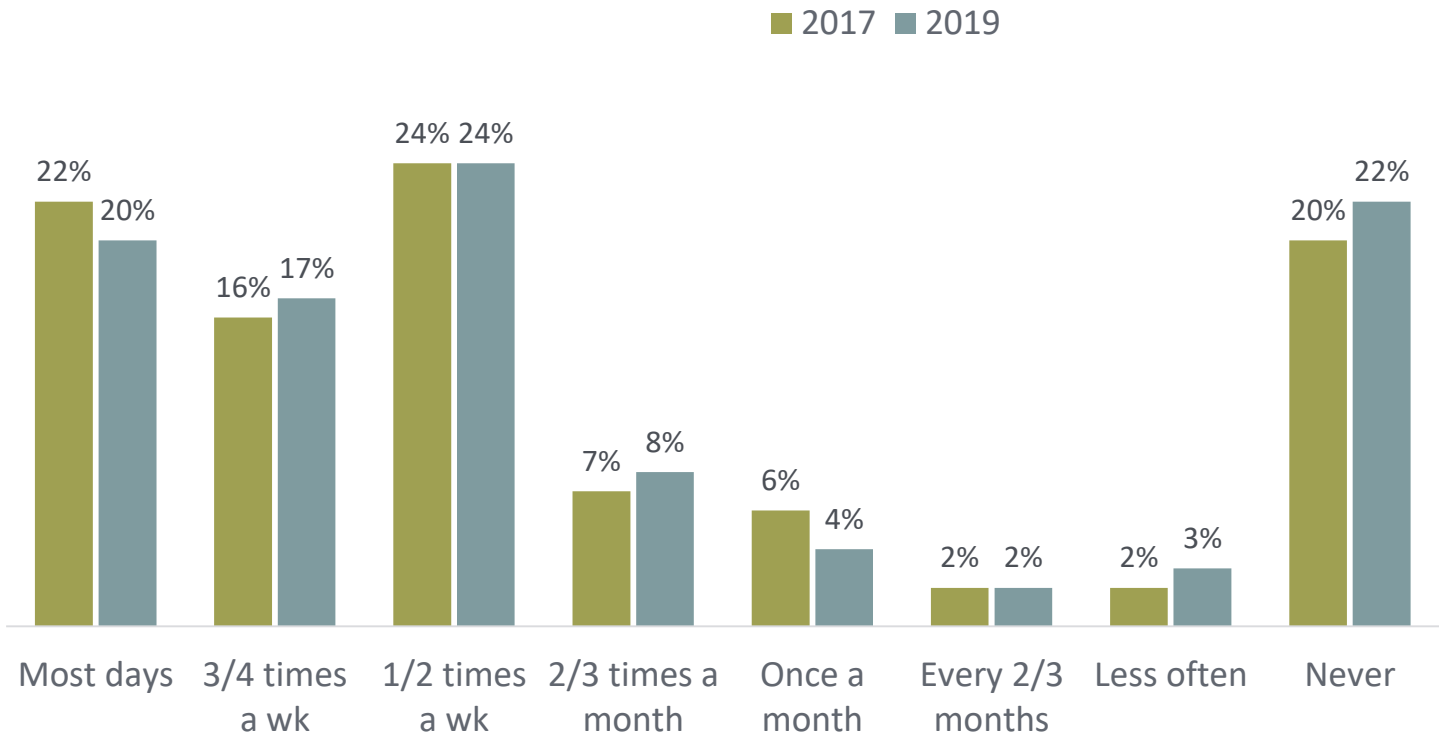
Q8: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Base (all people who cycle) 2017: 285, 2019: 342

Cycling behaviours
Frequency of child cycling

- In contrast to the adult population, 78% of parents of children aged 6 to 15 years old reported that their child cycles. This proportion corresponds very closely to the figure measured in 2017 (80%).
- The majority of parents of children in this age group (61%) reported that their child cycles at least once a week – again the data is very similar to 2017 (62%).

Almost four fifths of parents report that their child ever cycles



Q17: 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) 2017: 176, 2019: 192

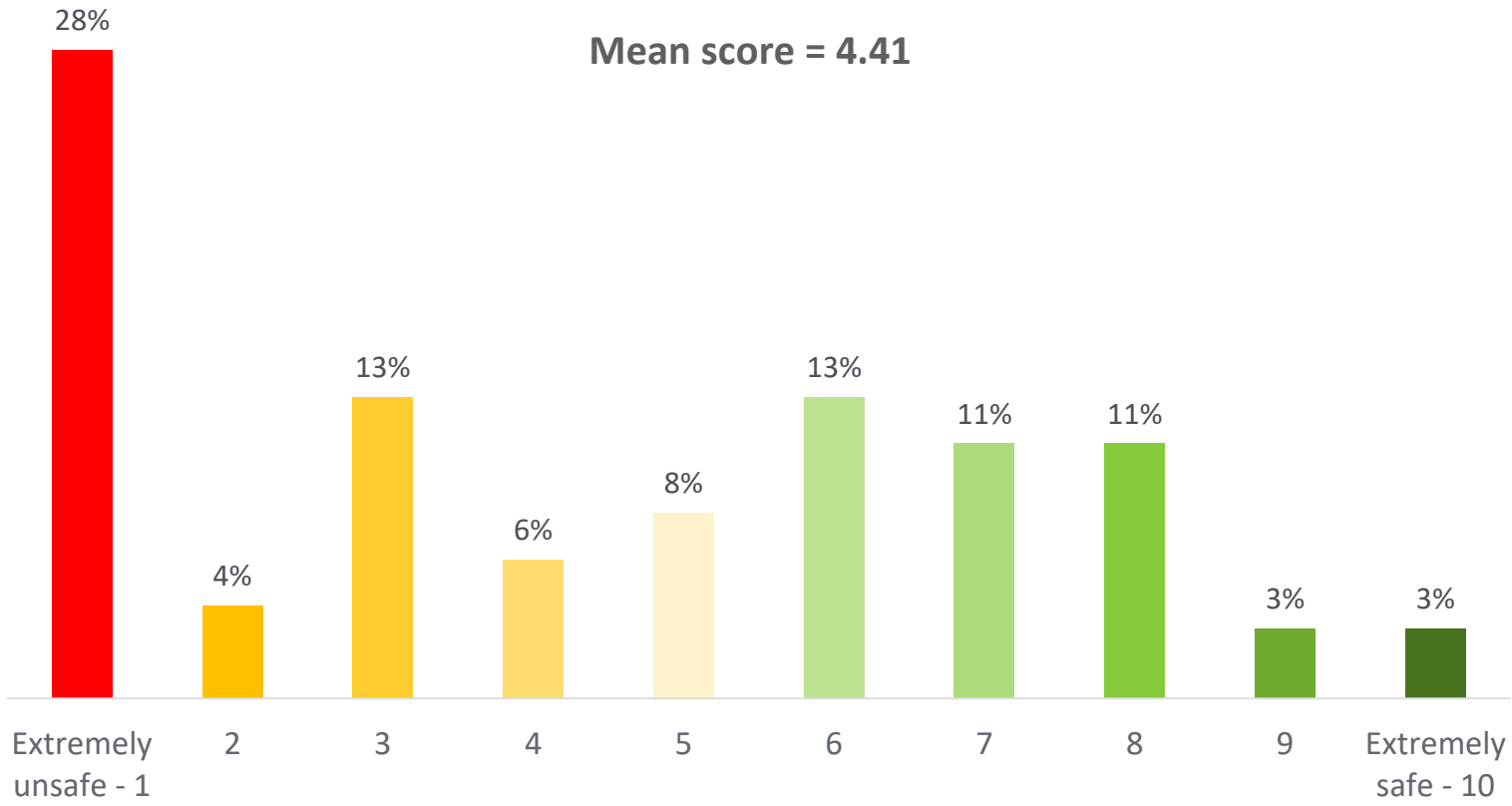
Cycling behaviours
Perceived safety for children cycling

- Amongst parents, there was clear concern about children cycling on the roads.
  - 59% rated the safety of roads for children cycling with a score of 5 or less
  - 28% gave the lowest possible score of 1 out of 10

- The ratings of safety for children cycling on roads was very similar in 2017 compared to 2019.
  - In 2017 62% rated safety with a score of 5 or less and 27% gave the lowest possible score of 1 out of 10

Q18: 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?

Many parents are concerned about the safety of children cycling on roads



Base (all with children aged 6 to 15 yrs): 192

Key insights

Cycling behaviours

- Around one third of the population cycle at least occasionally – with around one tenth cycling weekly.
  - This shows an increase in the proportion cycling since 2017, when 27% ever cycled.
  - The increase has mainly been in the proportion who cycle for leisure.

- Consistent with 2017, the most frequent cyclists were males, higher socio-economic groups and under 55 years old.

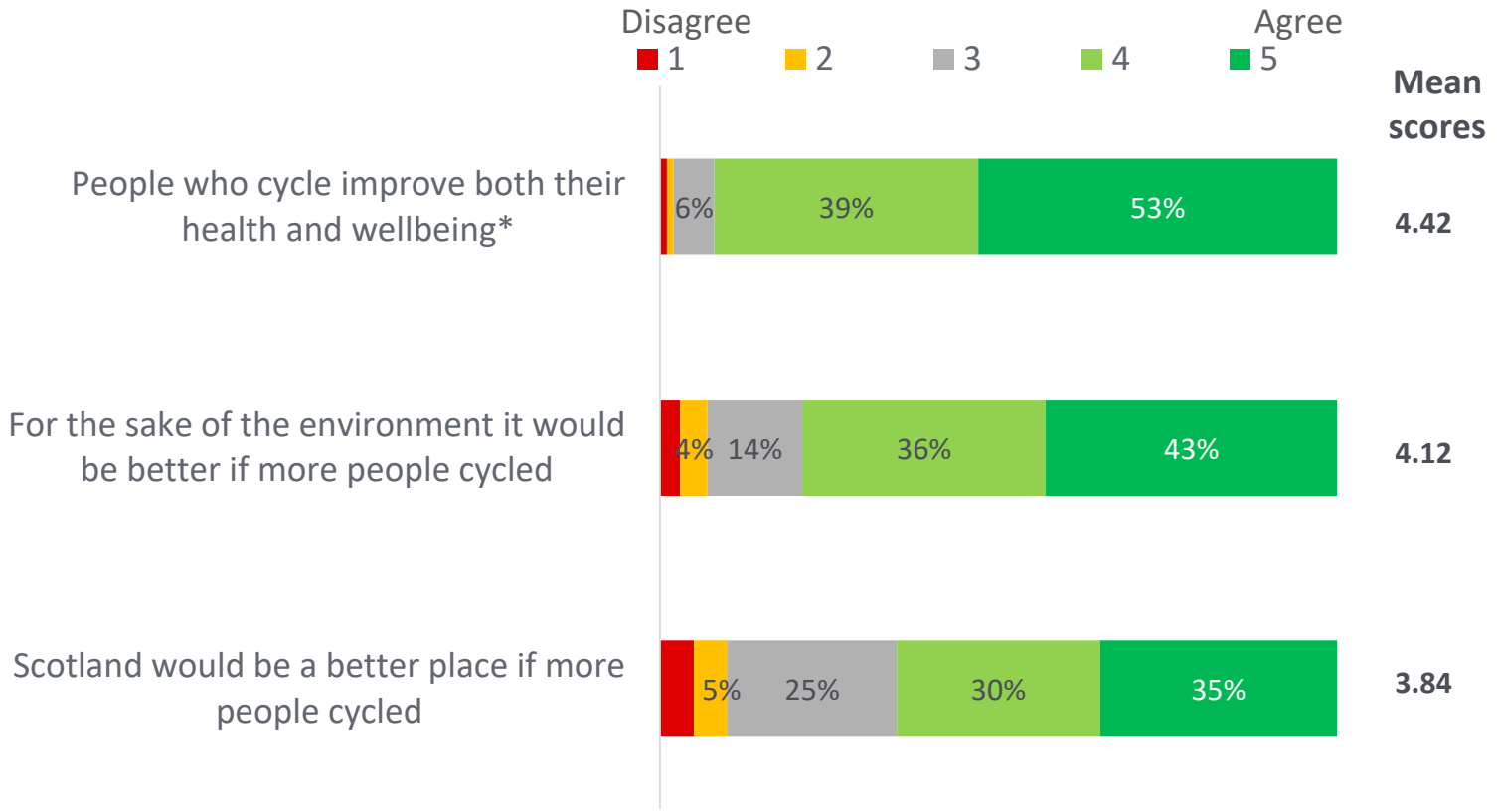
- Four fifths of parents reported that their children cycle regularly – however, their concerns about road safety for children cycling remain high.

Attitudes to cycling

Attitudes to cycling

- In a general sense, people's attitudes towards cycling were very positive:
  - 92% agreed that people who cycle improve both their health and their wellbeing
  - 79% agreed that, for the sake of the environment, it would be better if more people cycled
  - 65% agreed that Scotland would be a better place if more people cycled

The majority of population has positive attitudes towards cycling at macro level



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.

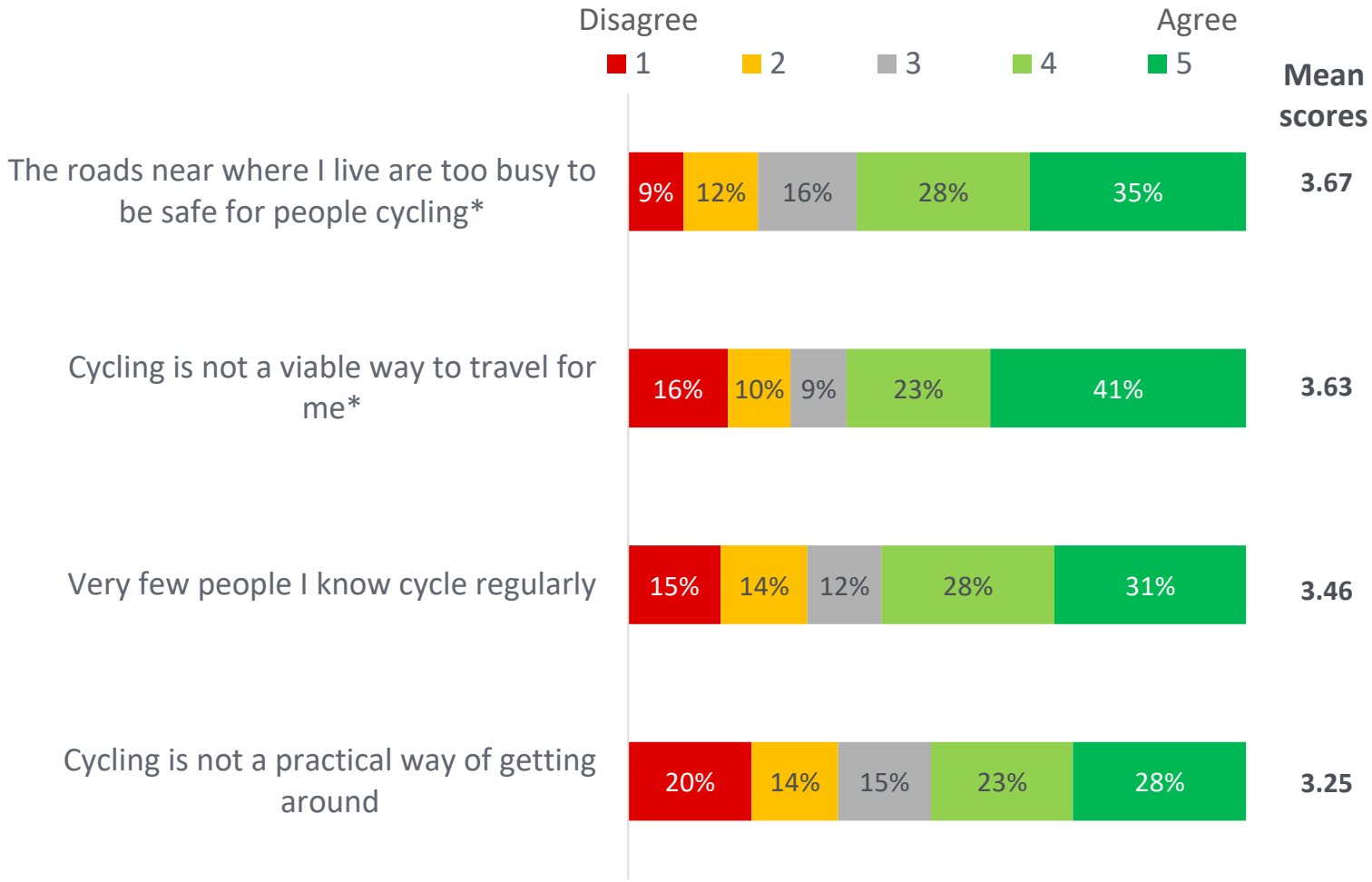
*New statement in 2019

Base (all): 1049

Attitudes to cycling

At personal level many agreed barriers put them off – busy roads and practicality

- A majority of respondents agreed that their local roads are too busy to be safe for cycling – 62% agreed and 21% disagreed.
- Over half of respondents also reported that very few people they know cycle regularly – 59% agreed.
- There was also more agreement than disagreement that cycling is not a practical way to get around – 51% agreed it's not practical and 64% agreed its not viable way to travel for them.



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.

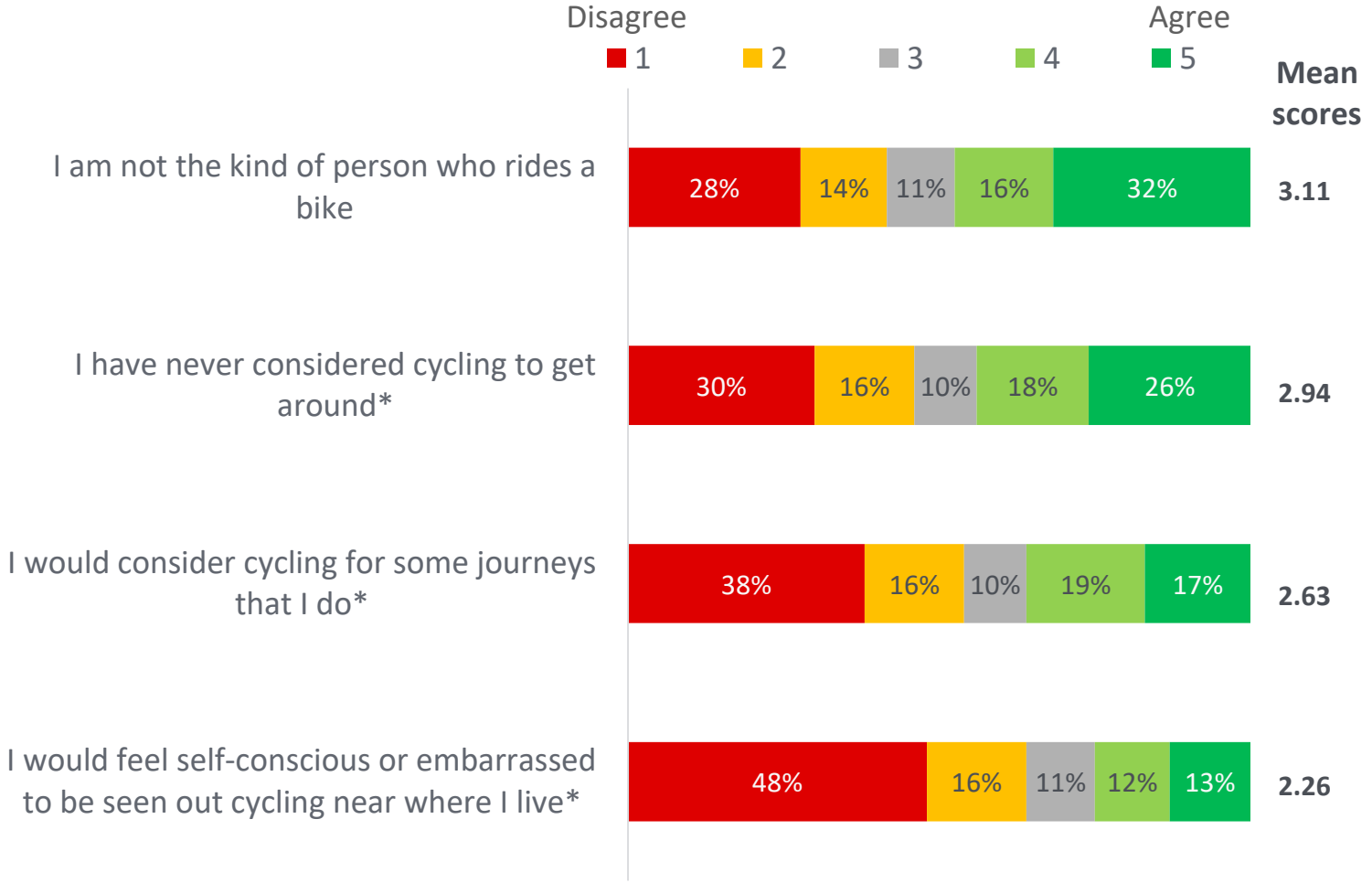
*New statement in 2019

Base (all): 1049

Attitudes to cycling

- Almost half of respondents (48%) just did not see themselves as the kind of person who cycles, although only 25% agreed that they would feel self-conscious to be seen out cycling locally.
- Despite the concerns and barriers expressed, and despite 44% agreeing that they have never considered cycling as a way to get around before, over one third (37%) agreed that they would consider cycling for some journeys that they do.

Almost half say they are not the kind of person who cycles; a quarter would feel self-conscious



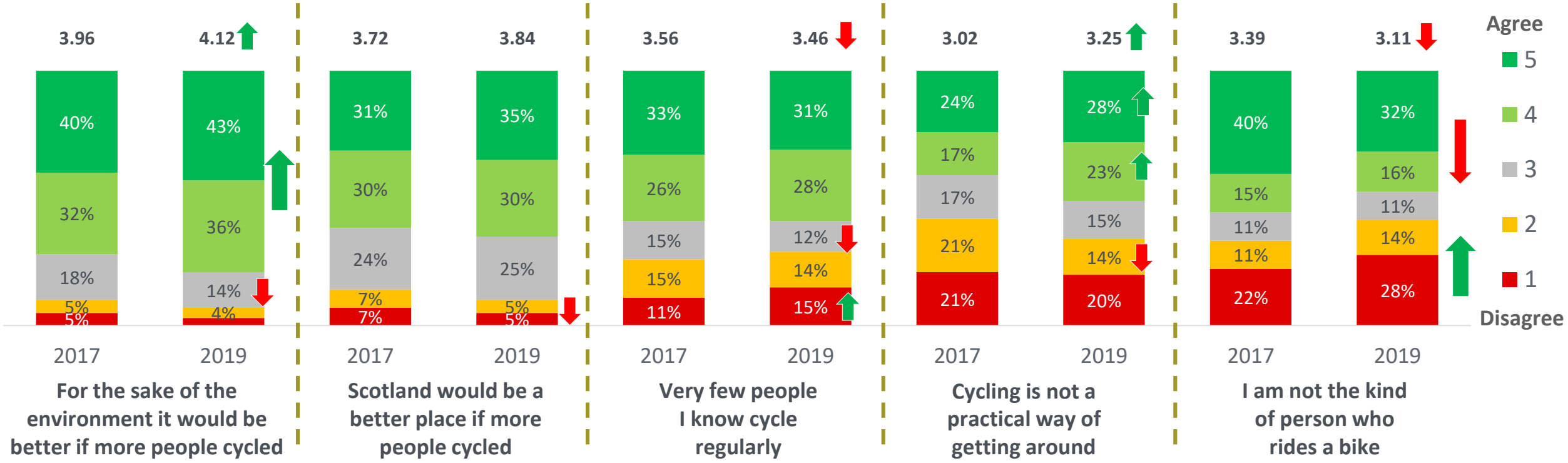
*New statement in 2019

Base (all): 1049

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

Some improvements in attitudes towards cycling between 2017 and 2019



- Agreement is higher in 2019 that, for the sake of the environment, it would be better if more people cycled (79%) than in 2017 (71%). This finding reflects other data indicating increased environmental influence on decisions and attitudes (e.g. in reasons to cycle).
- There has also been a decline in agreement and an increase in disagreement that 'I am not the kind of person who rides a bike' – indicating cycling is becoming more mainstream. More people also disagreed strongly with the statement 'very people I know cycle regularly' in 2019 (15%) compared to 2017 (11%).
- However, barriers persist and there has been an increase in agreement that cycling is not a practical way to get around – from 41% in 2017 to 51% in 2019.

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.

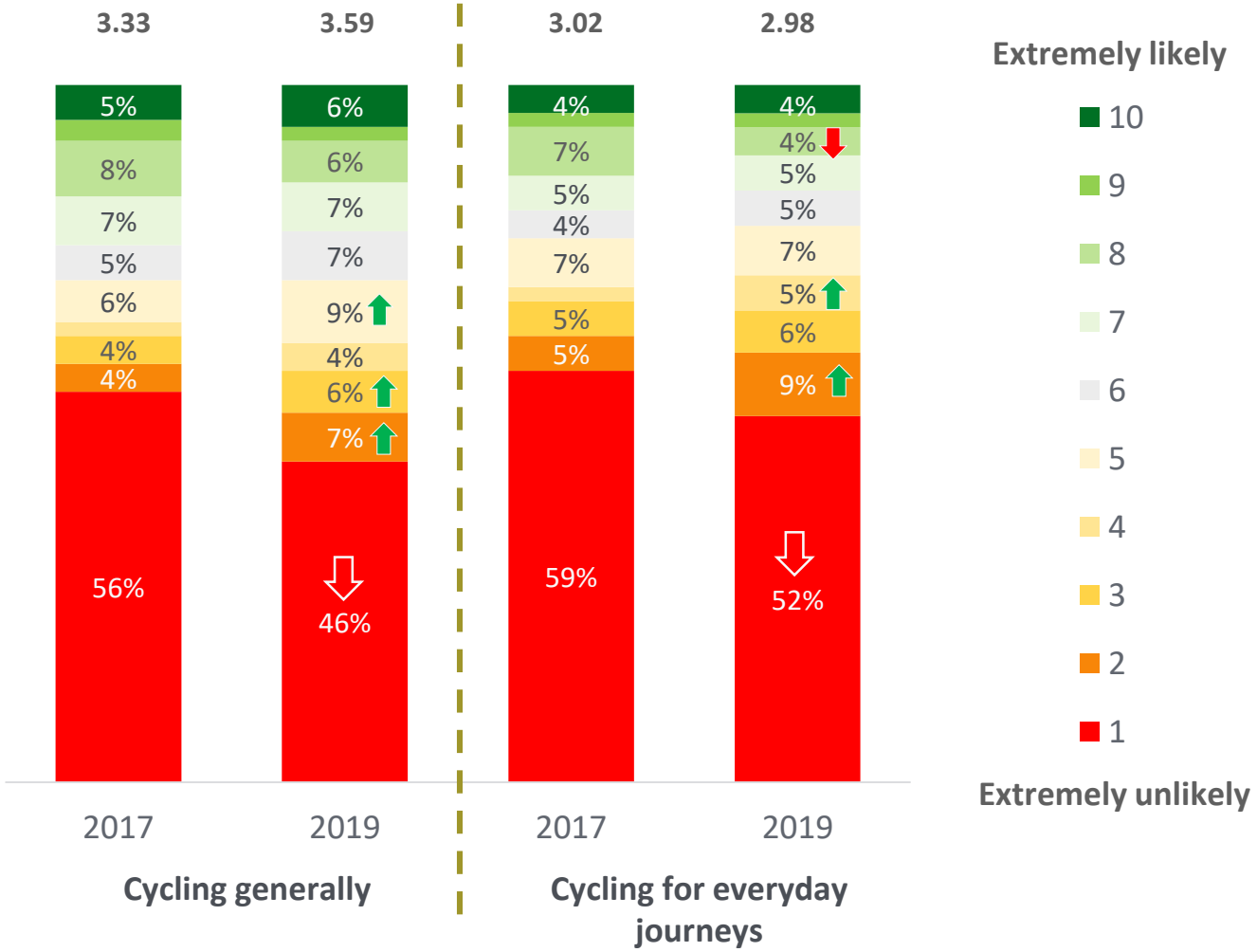
Base (all) 2017: 1060, 2019: 1049

Attitudes to cycling
Propensity to increase cycling

- In 2019, 29% of respondents considered it likely (score 6 or more) that they will cycle more generally in the next 2 to 3 years, while 20% considered it likely that they will cycle more for everyday journeys.
- These figures are consistent with the data gathered in 2017 – 28% likely generally, 22% likely for everyday journeys.
- There remains a core of people who strongly reject cycling in the future – by scoring their likelihood with 1 out of 10. However, this proportion has decreased since 2017 when almost 60% considered it extremely unlikely. In 2019, the proportion scoring propensity for cycling generally with 1 out of 10 was reduced to 46% and for everyday journeys it was reduced 52%.

Q9/10: 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?

Fewer people reject cycling generally and cycling for journeys in 2019 than in 2017



Base (all) 2017: 1060, 2019: 1049

Propensity to cycle more
Sub-sample analysis

- Propensity to cycle more generally was higher amongst the younger age groups, males, ABs and people living in rural areas.
  - Cycling generally – under 35s (4.59), males (3.92), ABs (4.45), rural (4.88)

- Propensity to cycle for everyday journeys was also higher for males (3.24) than females (2.72), and for under 35s (3.89) compared to older age groups - 35 to 54 (3.14); 55+ (2.01).

- Although females continue to show lower propensity to cycle, fewer gave the lowest score of 1 out of 10 in 2019 compared to 2017 – generally (2017: 62%; 2019: 50%); for everyday journeys (2017: 65%; 2019: 57%).

- People who currently cycle were much more optimistic about increasing cycling than non-cyclists.
  - Cycling generally – people who cycle (6.36); people who do not cycle (2.24)
  - Cycling for everyday journeys – people who cycle (5.11); people who do not cycle (1.95)

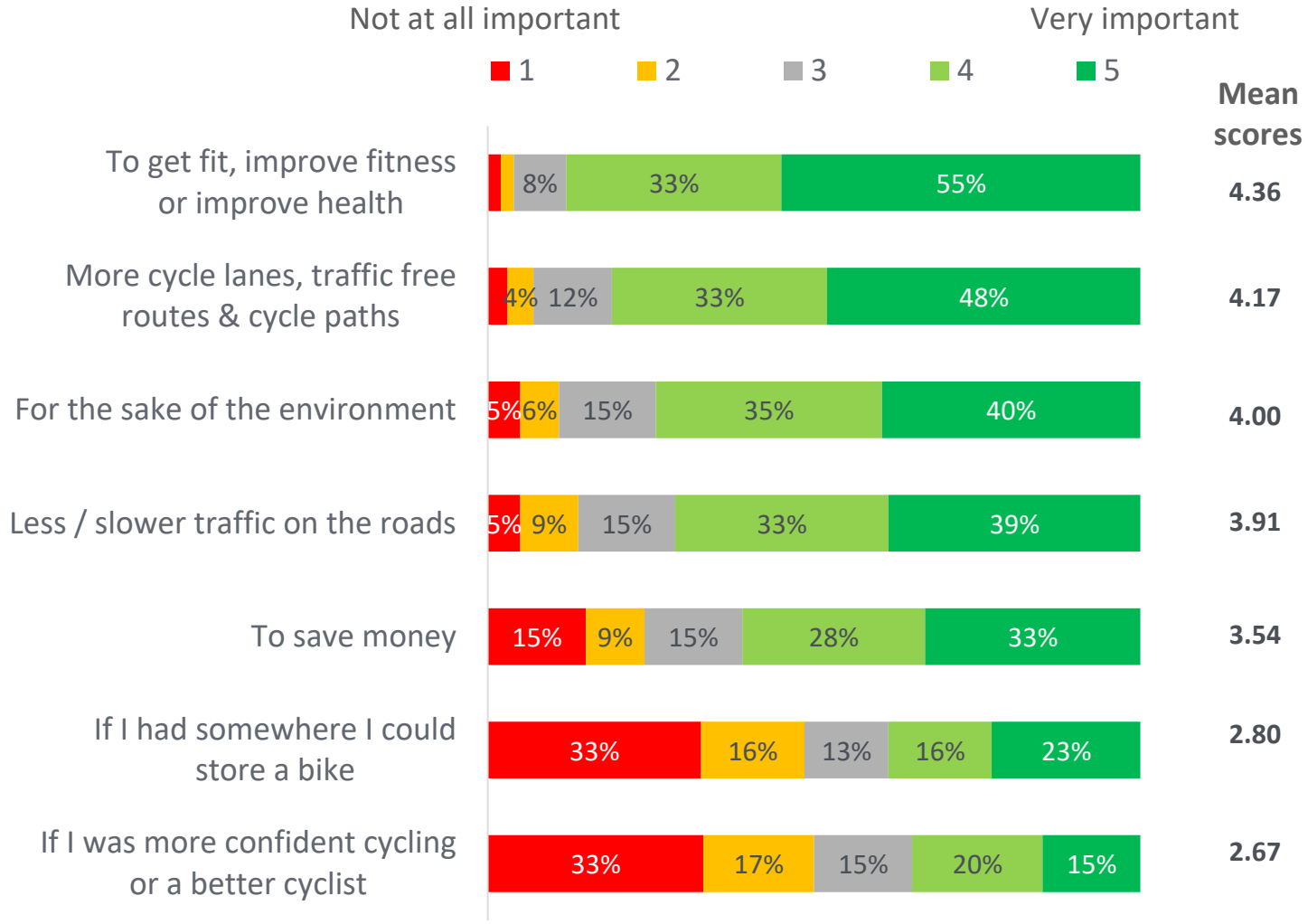
- Around two thirds of people who do not cycle gave a score of 1 out of 10 in terms of their likelihood to increase their cycling in the future, both generally and for everyday journeys. This is an improvement on 2017 when three quarters of people who didn't cycle gave a score of 1 out of 10 for both questions.

Attitudes to cycling
Motivations to cycle

- Those who scored 3 or more out of 10 for propensity to cycle were asked how important each of the listed factors would be in encouraging them to cycle more for everyday journeys.
- Reflecting the data collected in 2017, the motivating factors with the highest importance ratings in 2019 were to improve health (88% important) and better cycling infrastructure (80% important).
- Three quarters would also be motivated by environmental concerns, while 71% would like to see less/slower traffic and 61% would be motivated by the chance to save money. All of these proportions are closely aligned to the 2017 data.
- Confidence when cycling and bike storage space were important to a significant minority of people – 39% for bike storage and 35% for confidence.

Q11: 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.

Improving fitness and better cycling infrastructure remain the most important motivating factors

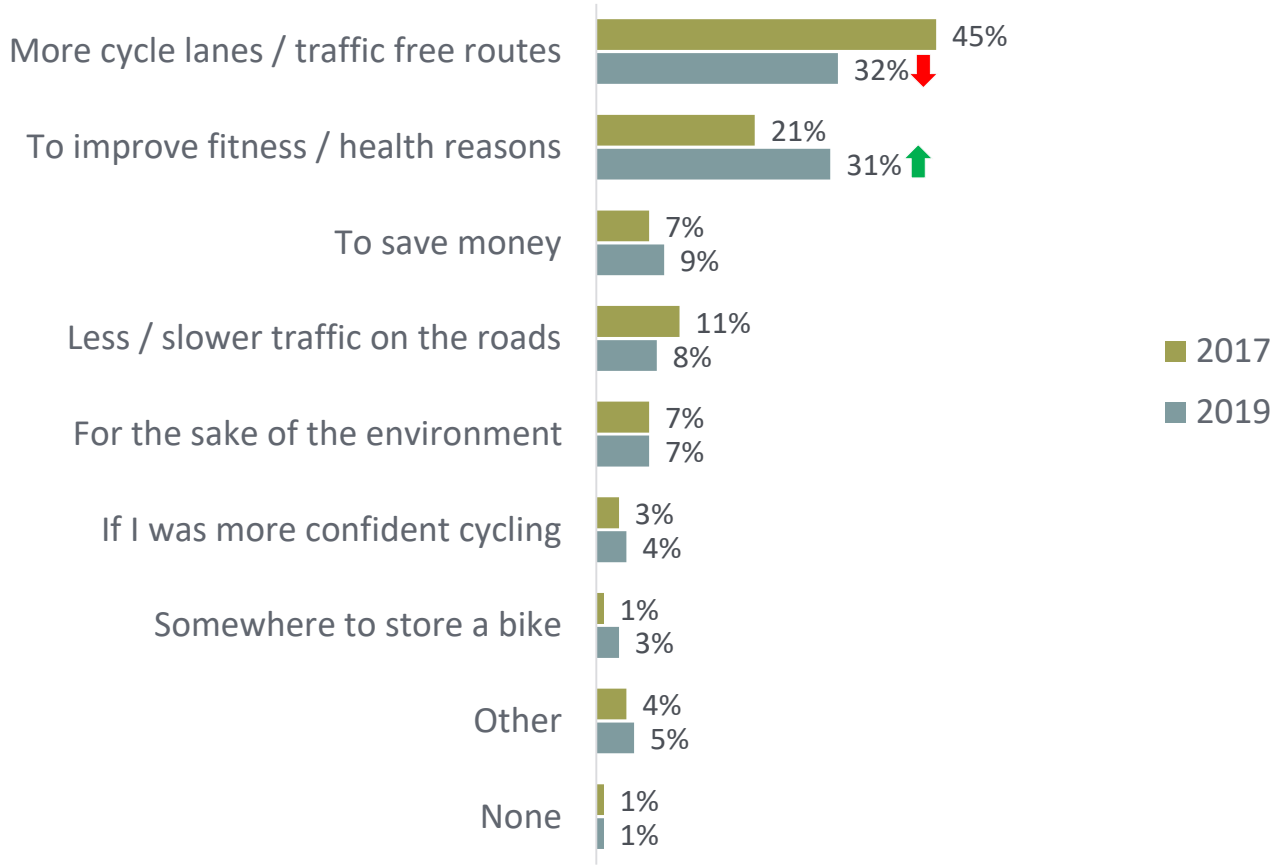


Base (all who score 3 or more for propensity to cycle – Q9/Q10): 497

Attitudes to cycling
Key motivation to cycle

More cycling infrastructure and improving fitness were the top motivating factors

- When asked to select just one key motivator, more cycle lanes and traffic free routes (32%) and to improve fitness (31%) were the most frequently cited.
- Fewer people mentioned infrastructure and more mentioned fitness in 2019 compared to 2017.
- The proportions selecting each of the other key motivators has remained consistent between 2017 and 2019.



Q12: 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 – Q10/Q11) 2017: 429, 2019: 497

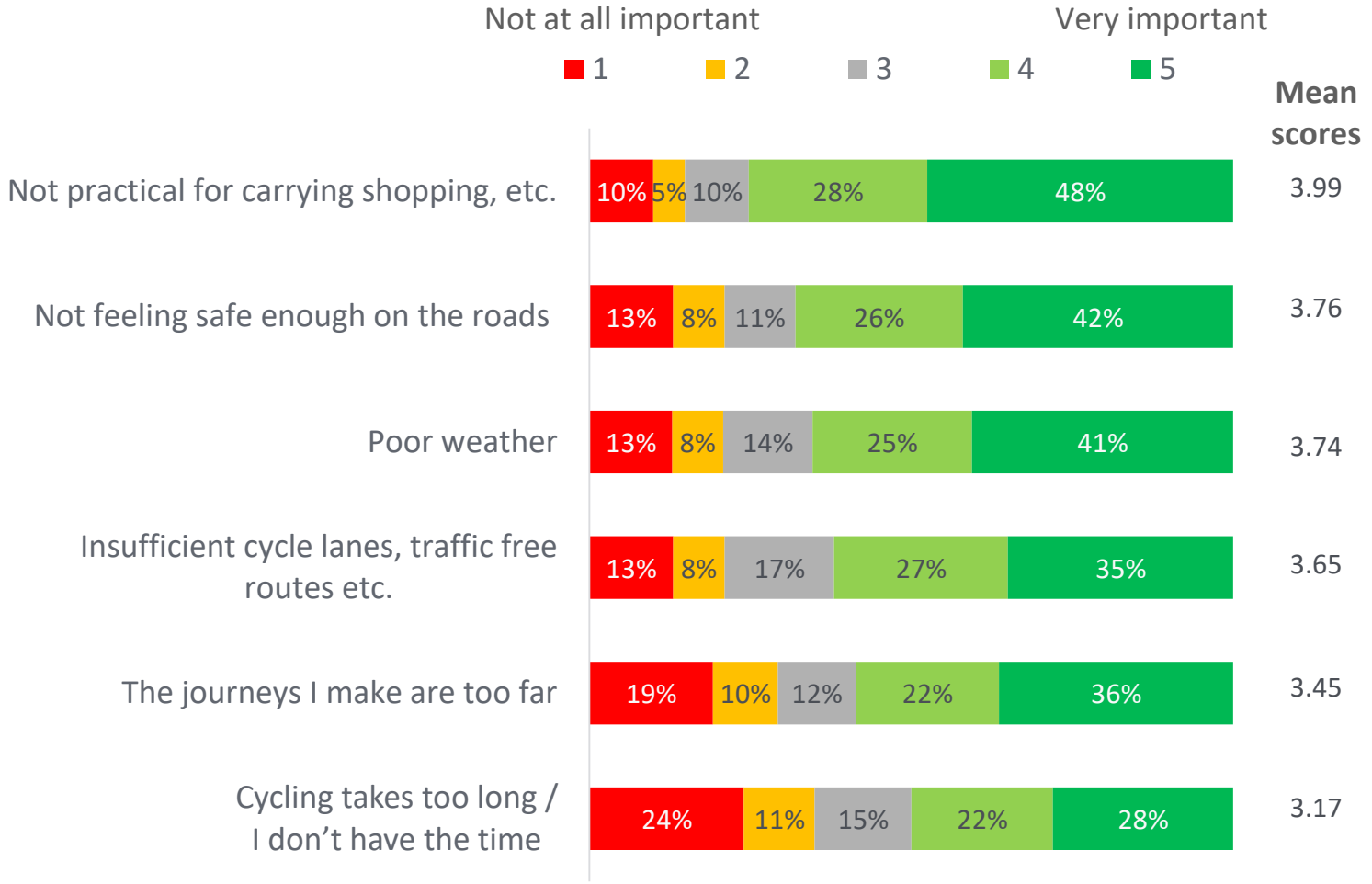
Attitudes to cycling

Barriers to cycling

- All respondents were asked to rate the importance of factors in preventing them from cycling more.
- Consistent with the 2017 findings, in 2019 a mix of practical and safety concerns were the key concerns.
- The four key barriers to cycling remain unchanged:
  - Not practical for carrying things (76% important)
  - Not feeling safe on roads (68%)
  - Poor weather (66%)
  - Insufficient cycle lanes / traffic free options (62%)
- Significant proportions also rated other practical barriers as important barriers to cycling:
  - Journeys too far (58% important)
  - Cycling takes too long (50%)
- The proportions rating these factors as important barriers have increased since 2017 – journeys too far (50% important in 2017) and takes too long (43% important in 2017).

Q13: 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.

The predominant barriers were the impracticality of carrying luggage, feeling safe and weather



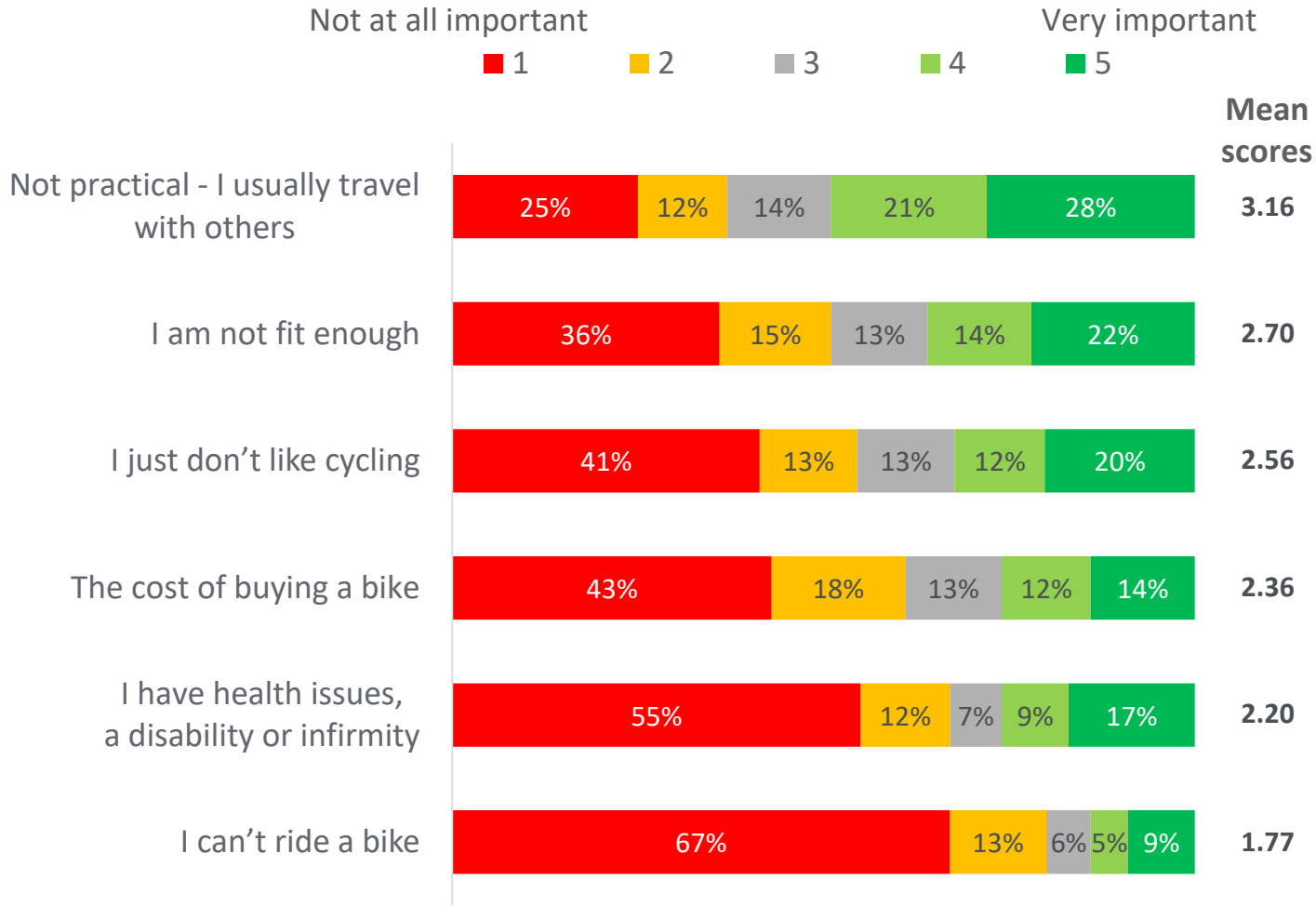
Base (all): 1049

Attitudes to cycling
Barriers to cycling

- More personal reasons for not cycling were less likely to be rated as important than the practical barriers previously noted.
- These included not being fit enough (36% important), health (26% important), inability to ride a bike (14% important) and simply not liking cycling (32% important).
  - However, these are likely to be significant obstacles to the minority of people who experience them

Q13: 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.

Personal reasons, such as fitness, health and ability to ride a bike, were less important barriers



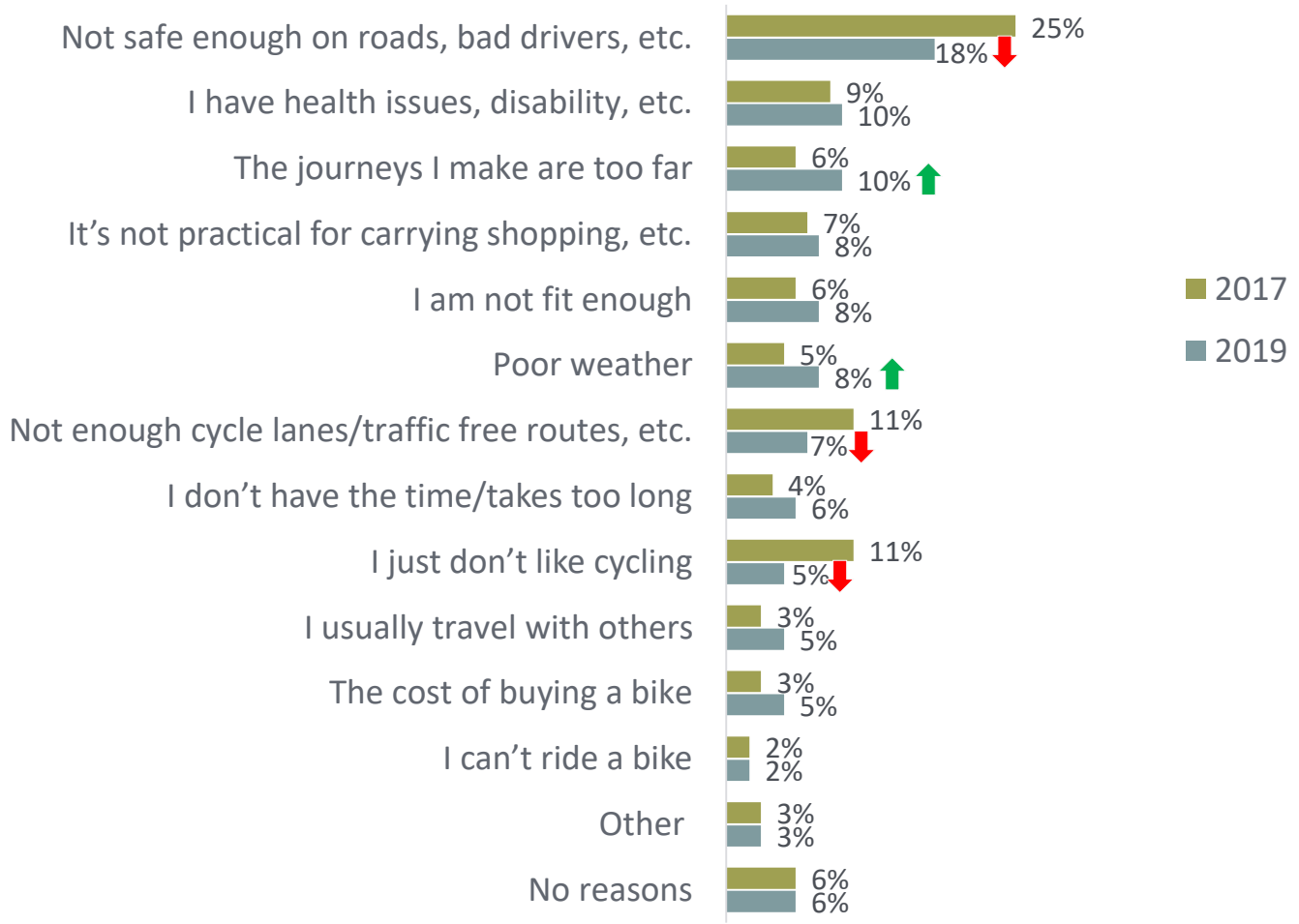
Base (all): 1049

Attitudes to cycling
Key barrier to cycling

- Respondents were asked to pick one key barrier that prevents them from cycling more.
- Reflecting the 2017 survey, no single barrier stood out as a significant issue for a large proportion of the population in 2019.
- The largest response was concern about safety on the roads, mentioned by 18% of respondents. This was less likely to be the main barrier in 2019 compared to 2017.
- Other barriers were mentioned by 10% or less of respondents – suggesting that no single issue inhibits cycling uptake, and that barriers are likely to vary depending on personal circumstances.

Q14: What would be the one main reason that you do not cycle / do not cycle more often for everyday journeys?

A wide range of concerns were selected as the main barrier – but safety on roads was the top answer



Base (all) 2017: 1060, 2019: 1049

Key insights

Attitudes to cycling

- The majority of people agreed that cycling is good for Scotland and the environment, and that people who cycle improve their health and wellbeing. More people agreed that cycling is good for the environment in 2019 than 2017.

- However, on a personal level attitudes focus on agreement with barriers, such as roads being too busy to be safe for cycling and cycling not being a practical transport option.
- For many, cycling is not prevalent in their social group or they just can't see themselves as cyclists – as we saw in 2017, these views were more prevalent amongst females, lower SEG and older respondents.

- A lower proportion of the sample rejected cycling more in the future in 2019 compared to 2017 – both cycling generally and for everyday journeys.

- 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 was evident – not feeling safe on the road, not practical for carrying luggage and the weather were the most often cited barriers to cycling.

Segmentation analysis

Segmentation analysis
Defining characteristics

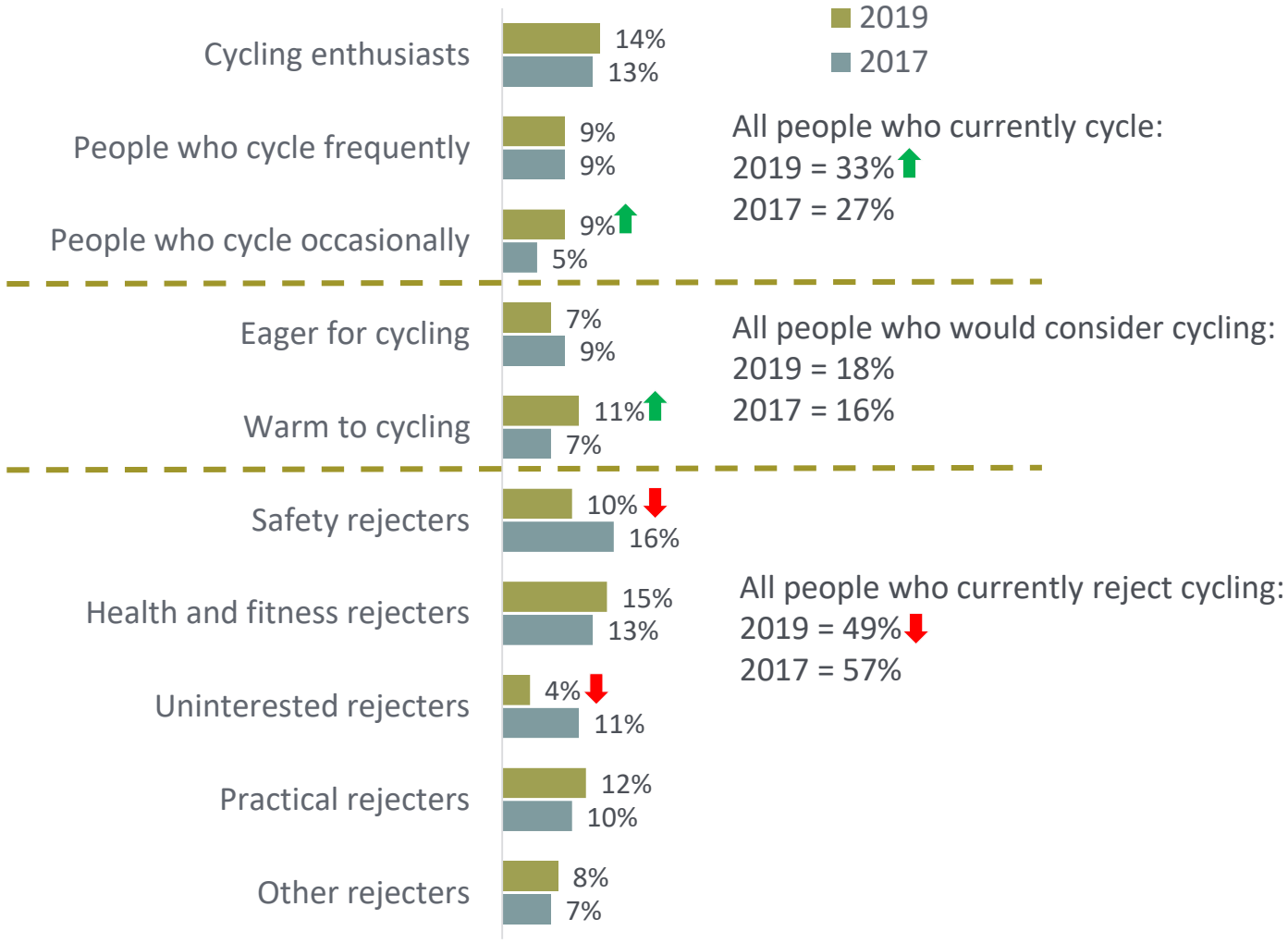
- Segmentation analysis was conducted in 2017 to provide insight into groupings in the population in relation to attitudes to cycling.
- The segmentation model was based on - Q1d – frequency of cycling for transport; Q6 – frequency of cycling for leisure; Q9 – propensity to cycle more in the future generally; Q14 – main reason for not cycling more.
- Ten segments were developed based on these questions. This model has also been applied to the 2019 data.

Segment	Defining characteristics
Cycling Enthusiasts	Cycle for transport or leisure at least once a week
People who cycle frequently	Cycle for transport or leisure less than once a week but more than once every 3 months
People who cycle occasionally	Cycle for transport or leisure less than once every three months
Total	All people who cycle
Eager to cycle	Currently never cycle, but high propensity to cycle in next 2 to 3 years
Warm to cycling	Currently never cycle, with moderate propensity to cycle in next 2 to 3 years
Total	All who would consider cycling
Safety Conscious Rejecters	Currently never cycle, no intention to cycle in next 2 to 3 years, safety concerns are the main reason
Health and fitness-based Rejecters	Currently never cycle, no intention to cycle in next 2 to 3 years, health is the main reason
Uninterested Rejecters	Currently never cycle, no intention to cycle in next 2 to 3 years, just don't like cycling
Practical Rejecters	Currently never cycle, no intention to cycle in next 2 to 3 years, practical issues are the main reason
Other Rejecters	Currently never cycle, no intention to cycle in next 2 to 3 years for a variety of reasons
Total	All who currently reject cycling

Segmentation

- The total proportion of respondents who reported that they cycle increased from 27% in 2017 to 33% in 2019.
- The largest increase in people who cycle was amongst those who cycle occasionally – less than once every 3 months.
- There has been a decrease in those who currently reject taking up cycling in the next 2 to 3 years – from 57% in 2017 to 49% in 2019.
- The largest decreases are in those who cite their main barriers as no interest in cycling and safety reasons.
- Respondents within the Eager for Cycling segment tended to be younger in age – 49% were under 35 years old.

Increase in the cycling segment and decrease in cycling rejecters



Base (all) 2017: 1060, 2019: 1049

Impact of life events on transport choices

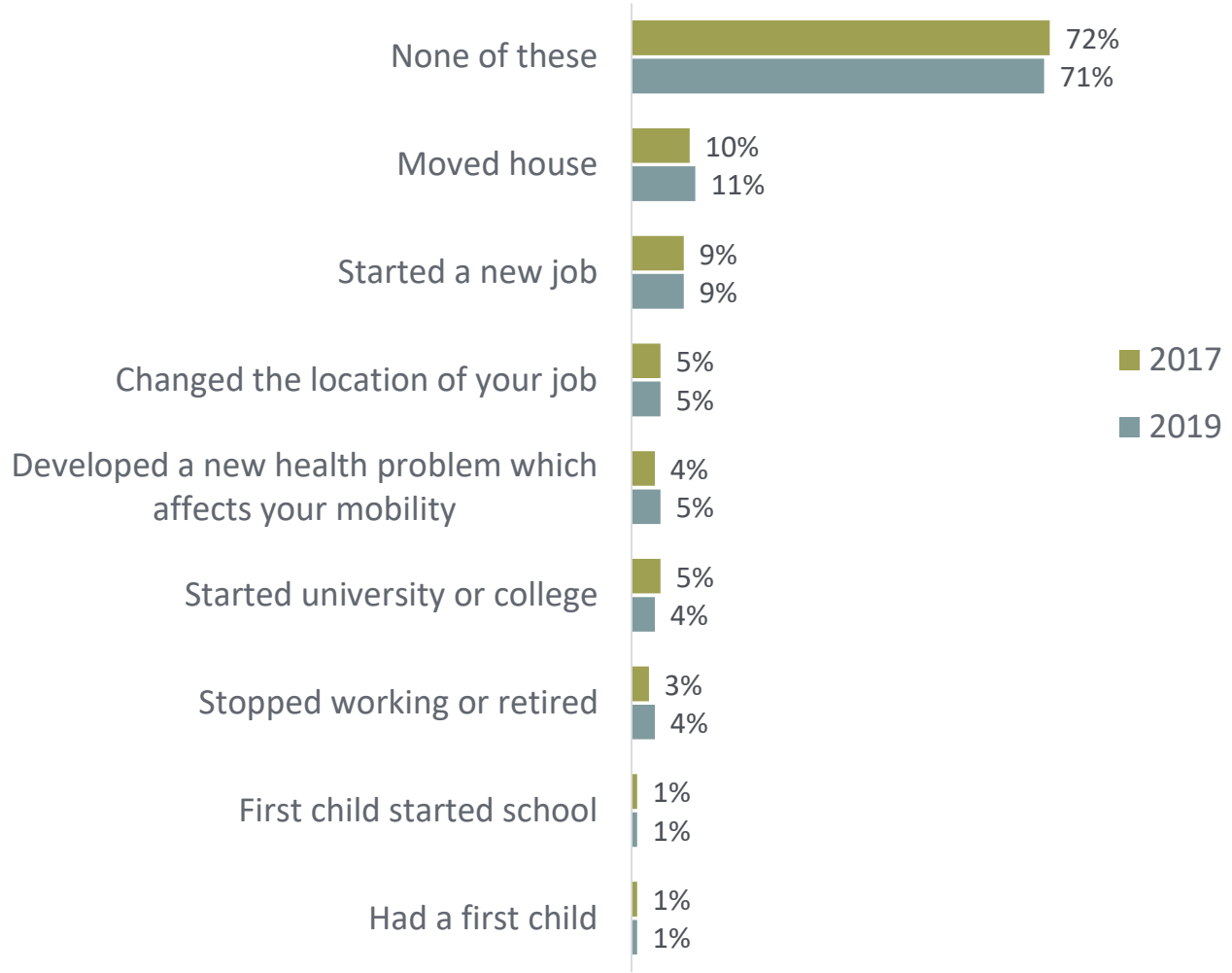
Life events

Experience of life events

- Important changes in life circumstances are an opportunity to re-evaluate transport choices and can lead to uptake of sustainable options such as cycling.
- In 2019 29% of respondents had experienced a significant life event in the last year. This proportion was consistent with 2017 (28%).
  - Most commonly moved house or started a new job.
- The proportions citing each type of life event were consistent between 2017 and 2019.
- Under 35 year olds were more likely to have experienced life events (48%) than 35 to 54 year olds (24%) or those aged 55+ (18%).
- Those in socio-economic group C1 were also more likely to have experienced a change in circumstances (22%) than other socio-economic groups.

Q19: Have you experienced any of the following life events in the last 12 months?

Almost 3 in 10 respondents experienced a significant life event in the last year



Base (all) 2017: 1060, 2019: 1049

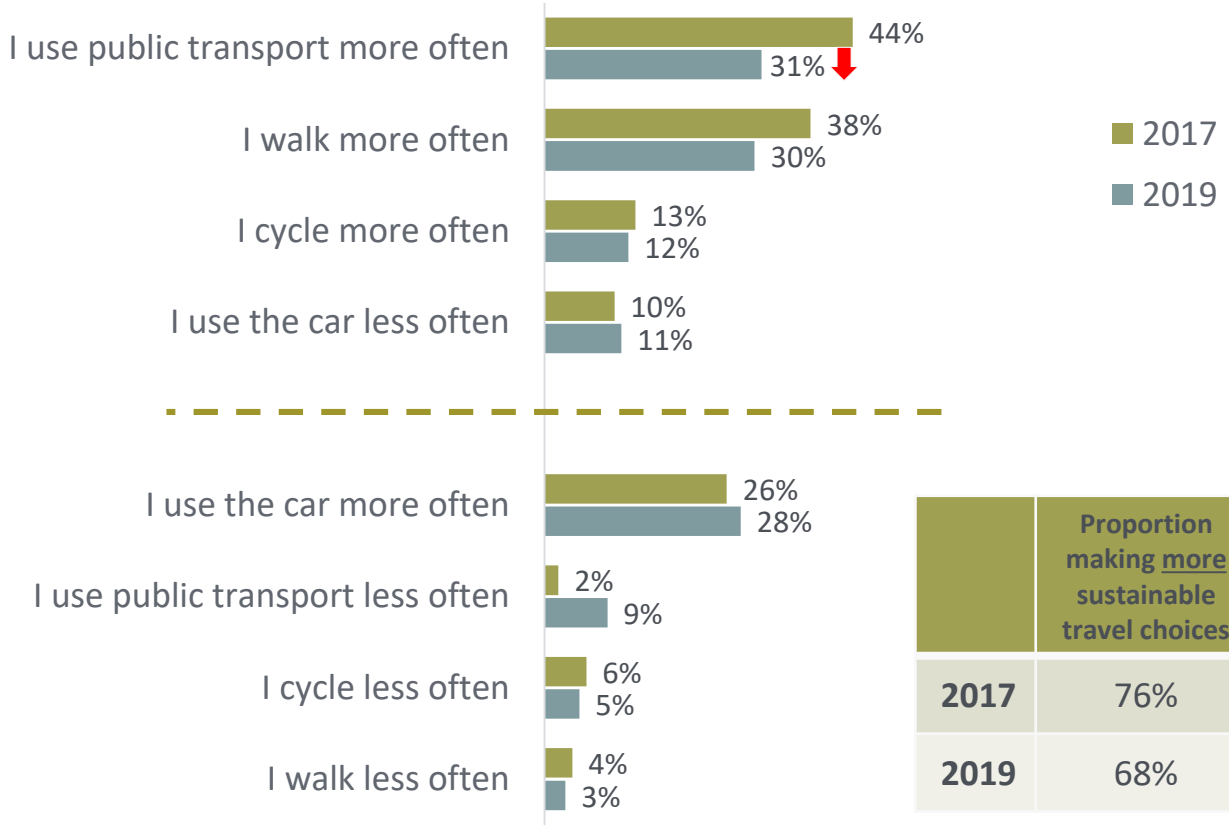
Life events
Impact on transport choices

- 31% of those who experienced a life event in the last year stated that it had an impact on transport choices.
- In total, 68% of those who changed their transport choices made a move towards more sustainable travel options.
  - Mostly using public transport and walking more
  - 12% cycle now more often
- 32% 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.

Q20 Did this event cause you to re-think or change the type of transport you use for travel for everyday journeys?
Q21: In what way did your transport choices change?

Of those who experienced a life event, 31% changed transport choices

31% of those who experienced a life event stated that impacted on their transport choices (36% in 2017)



	Proportion making more sustainable travel choices	Proportion making less sustainable travel choices
2017	76%	35%
2019	68%	32%

Base (all who experienced a life event and changed transport choices) 2017: 108, 2019: 94

Influence of people and events on propensity to cycle

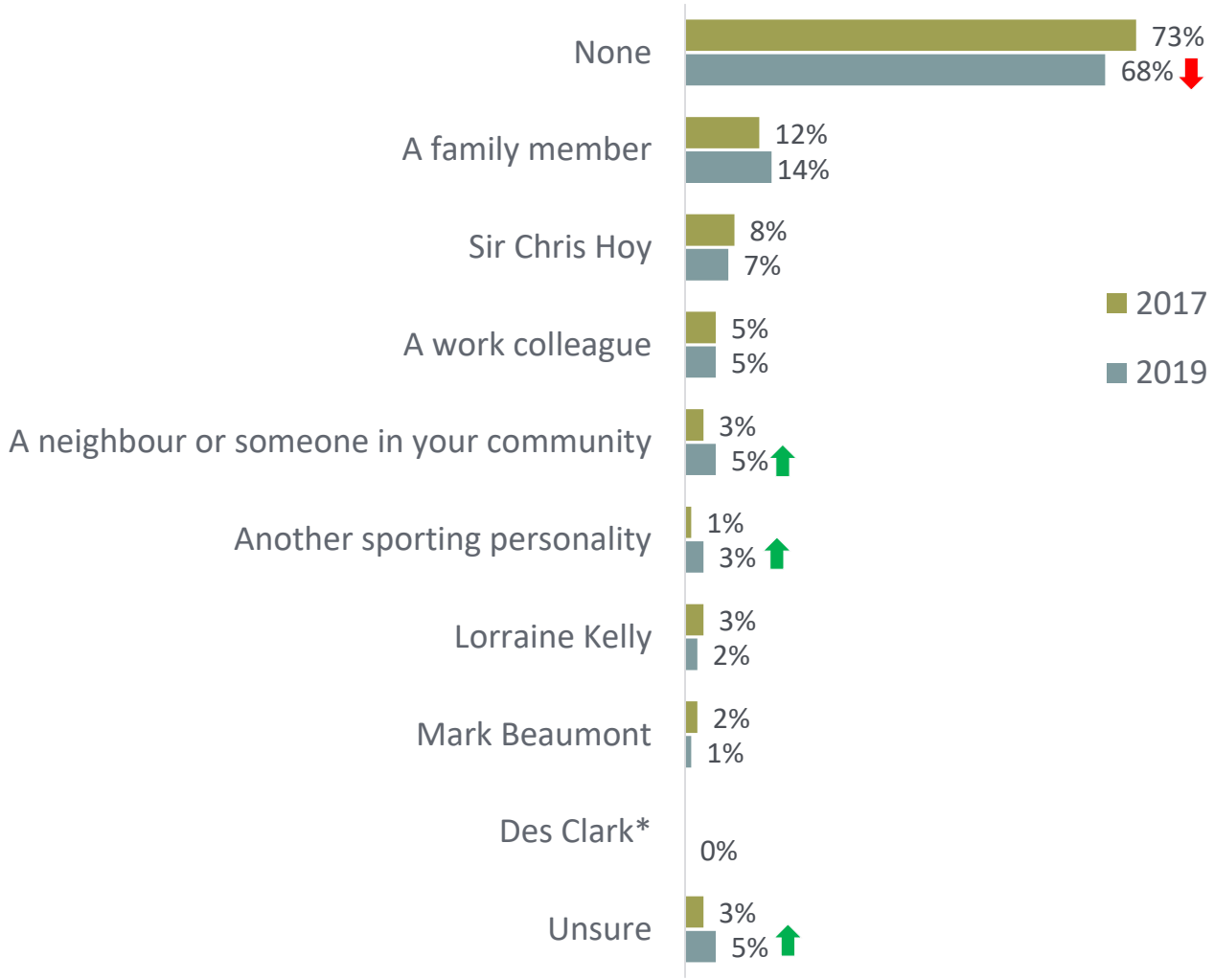
Influence of people and events

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 were considered the most influential – 14% reported that they might be encouraged to cycle by a family member.
- The most encouraging celebrity was Sir Chris Hoy.
- The younger the respondent the more likely they were to say they could be influenced – 46% of under 25s compared to 14% of over 55s.
- Higher SEG groups were also more likely to be influenced – ABC1 (32%), C2DE (21%)

Q22: 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?

Just over one quarter might be influenced by others to take up cycling or cycle more



*new option for 2019

Base (all) 2017: 1060, 2019: 1049

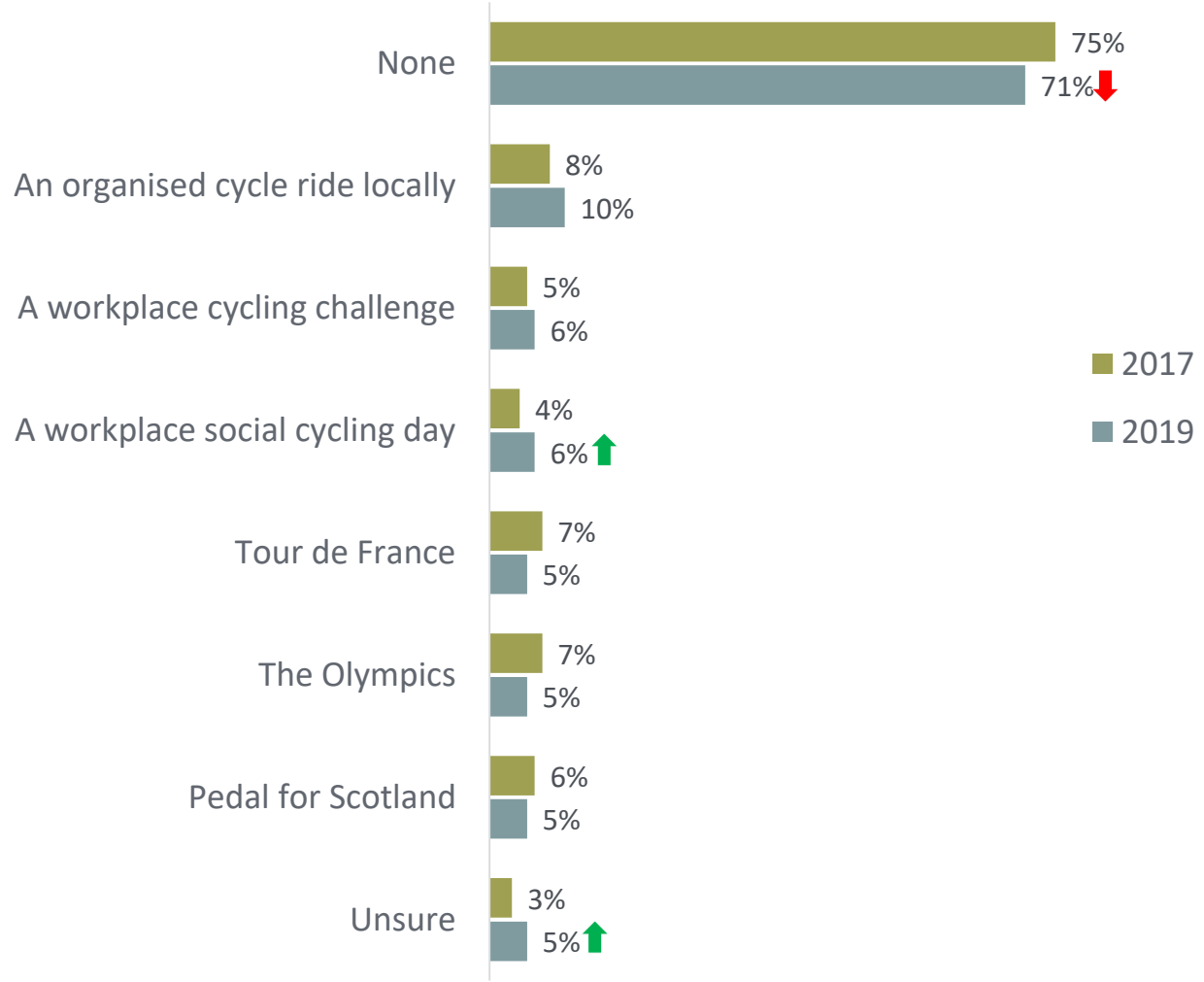
Influence of people and events

Influence of events

- Around one quarter of respondents (24%) stated they could be influenced by an event to take up cycling or cycle more often. This is consistent with 2017 (22%).
- No single event or type of event stood out, however, one in ten said an organised cycle ride locally might influence them. Workplace events were mentioned by 6% of respondents.
- The Tour de France, The Olympics and Pedal for Scotland were all selected by similar proportions of the sample (5%).
- Again, the younger the respondent the more likely they were to say they could be influenced – 40% of under 25s compared to 9% of over 55s.
- Higher SEG groups were also more likely to be influenced – ABC1 (27%), C2DE (20%)

Q23: Which of the following events would be likely to encourage you to take up cycling or cycle more often?

One quarter stated an event might encourage them to take up cycling or cycle more



Base (all) 2017: 1060, 2019: 1049

Summary and conclusions

Summary and conclusions

There has been an increase in the proportion of people who cycle

- One third of the sample reported that they ever cycle in 2019, compared to 27% in 2017.
- This increase is mostly in those who cycle for leisure and who cycle infrequently.
- The profile of people who cycle continues to be skewed to males, younger age groups and ABs.
- However, there was a more significant increase in the proportion cycling for females compared to males.

There has also been an increase in propensity to cycle

- Fewer respondents selected the lowest score of 1 out of 10 for propensity to cycle generally in 2019 (46%) compared to 2017 (56%).
- The proportion scoring 1 out of 10 for cycling for every journeys also decreased – 2017 (59%); 2019 (52%)

Attitudes towards cycling in a general sense continue to be very positive

- The majority agree that cycling improves health and wellbeing, and that it is good for Scotland and for the environment

But many continue to see it as impractical and unsafe

- Most agreed that their local roads are too busy to be safe for cycling and that is not a viable way for them to travel.

Summary and conclusions

There has been some improvement in personal association with cycling

- Although many still agree that few people they know cycle regularly and that they are not the kind of person who rides a bike, these proportions are lower in 2019 than in 2017.

The motivations to cycle are largely consistent with 2017

- The key motivating factors remain improving fitness and the provision of more cycling infrastructure, such as cycle lanes and traffic free routes.

The main barriers to cycling in 2019 are also very similar to 2017

- Not practical, not feeling safe, the weather and insufficient cycling infrastructure were the top answers in relation to the importance of barriers
- However, the importance of barriers to individual people can vary considerably and depends very much on circumstances. 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.

There is some evidence that environmental concerns are becoming more front of mind

- More people agreed that for the sake of the environment it would be better if more people cycled.
- More people who cycle for everyday journeys said they did so for environmental reasons.

Thank you

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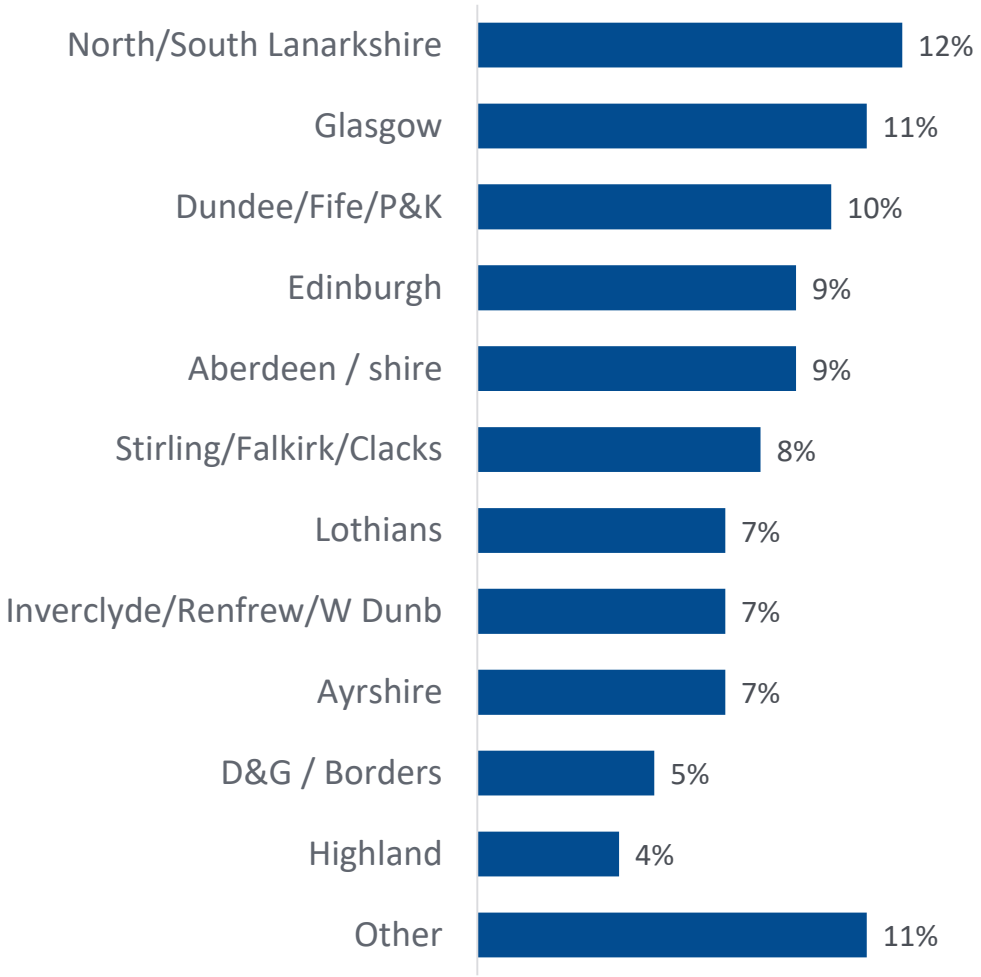
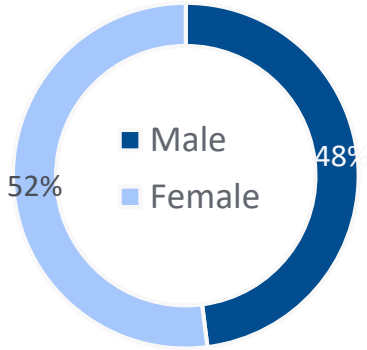
Appendix I
– Scotland population statistics

The sampling plan for each wave of research was based on Scotland statistics for region, gender, age and socio-economic groups - the Scotland profile is shown below

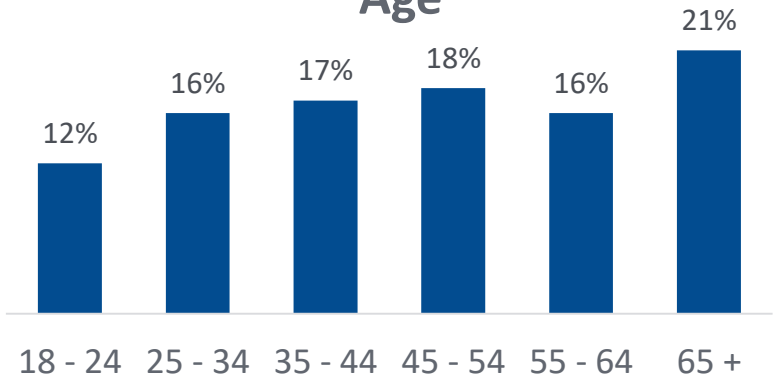
Region



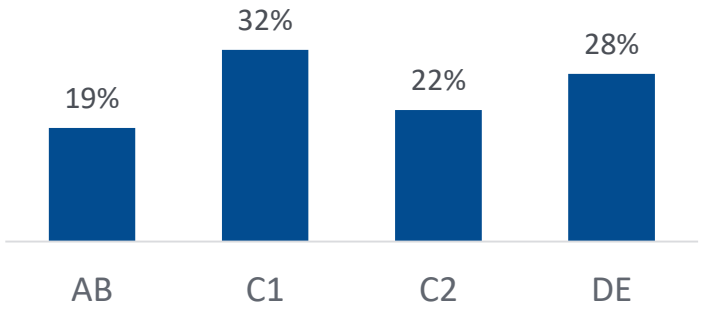
Gender



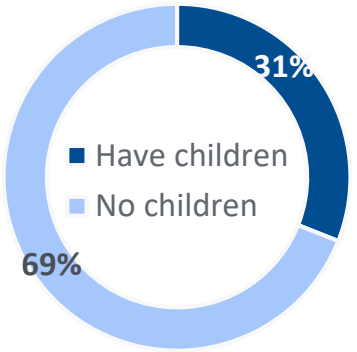
Age



Socio-economic Group



Dependant children in household



Scotland statistics source: Census 2011

Appendix II – Technical appendix

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 final achieved sample size was 1060 in 2017 and 1049 in 2019.
- Fieldwork was undertaken between 28th August and 19th September 2017, and 26th August and 22nd September 2019.
- 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, 35 interviewers worked on data collection at each wave.
- 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.

Progressive's services

Core qualitative techniques
A full range of qualitative research methods

Language and behaviour
Gets communications right in tone and content

Mobile ethnography
Captures real consumer behaviour in real time

The View on Scotland
Glasgow city centre viewing facility provides comfort convenience and first class facilities

Brand mapping
Discovers core brand values, benchmarks and maps progress

Core quantitative techniques
A full range of quantitative research methods

Progressive Scottish Opinion
Offers fast and inexpensive access to over 1,000 Scottish consumers

Progressive Business Panel
Takes soundings from companies across Scotland quickly and efficiently

Field and tab
Bespoke stand alone Field and Tab services for qualitative and quantitative methods

Data services
We have a wide range of analytical services