

progressive

Cycling Scotland  
Attitudes and Behaviours Towards  
Cycling in Scotland – Wave 3  
October 2021



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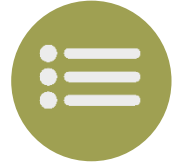
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# Project background



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, before 2017 no specific Scottish population-wide longitudinal research into cycling behaviours and attitudes had been undertaken.



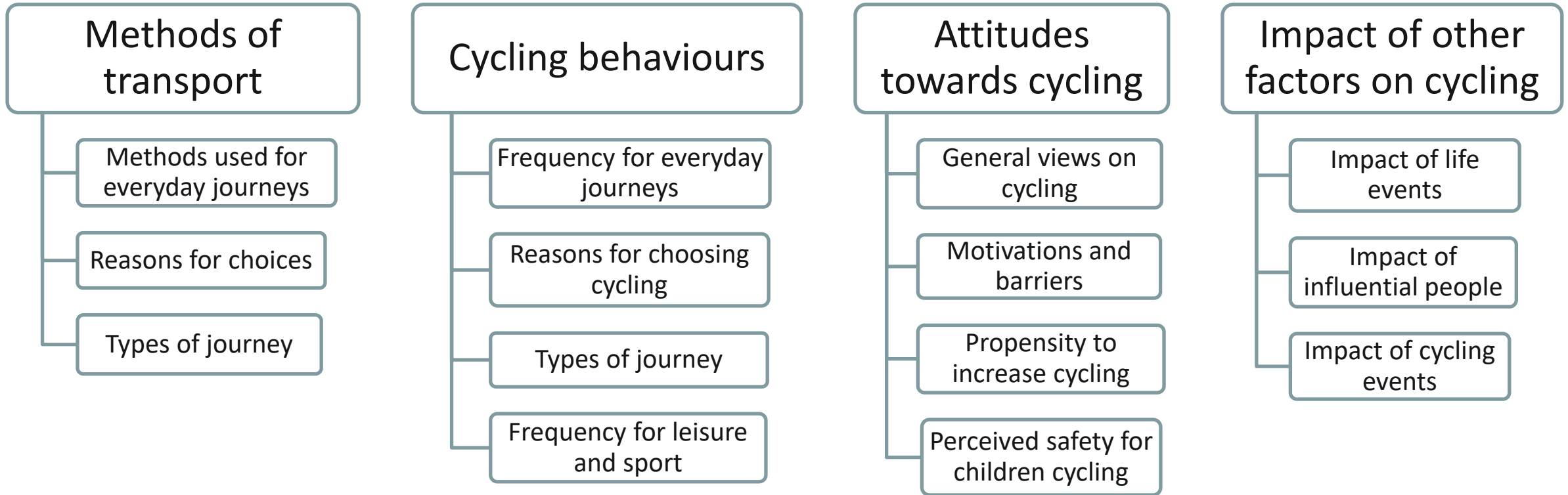
Cycling Scotland commissioned a long-term research study to:

- 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 has conducted 2 waves of research in 2017 and 2019. This report details the findings of the third wave of the tracker, completed in September 2021.

It is particularly important to measure and track attitudes and behaviours towards cycling given likely changes brought about over the coronavirus pandemic in 2020/21. This wave of research provides insight into how changes in behaviours and transport choices during the pandemic have affected attitudes to cycling.

# Project objectives



# Method



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

## Wave 3

The method replicated waves 1 and 2 – face-to-face in street interviews

Sample size: 1029 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 25<sup>th</sup> August and 24<sup>th</sup> September 2021


The margin of error on a sample of 1029 is between +/- 0.61% and +/- 3.05% 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 (at 95% confidence interval)

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



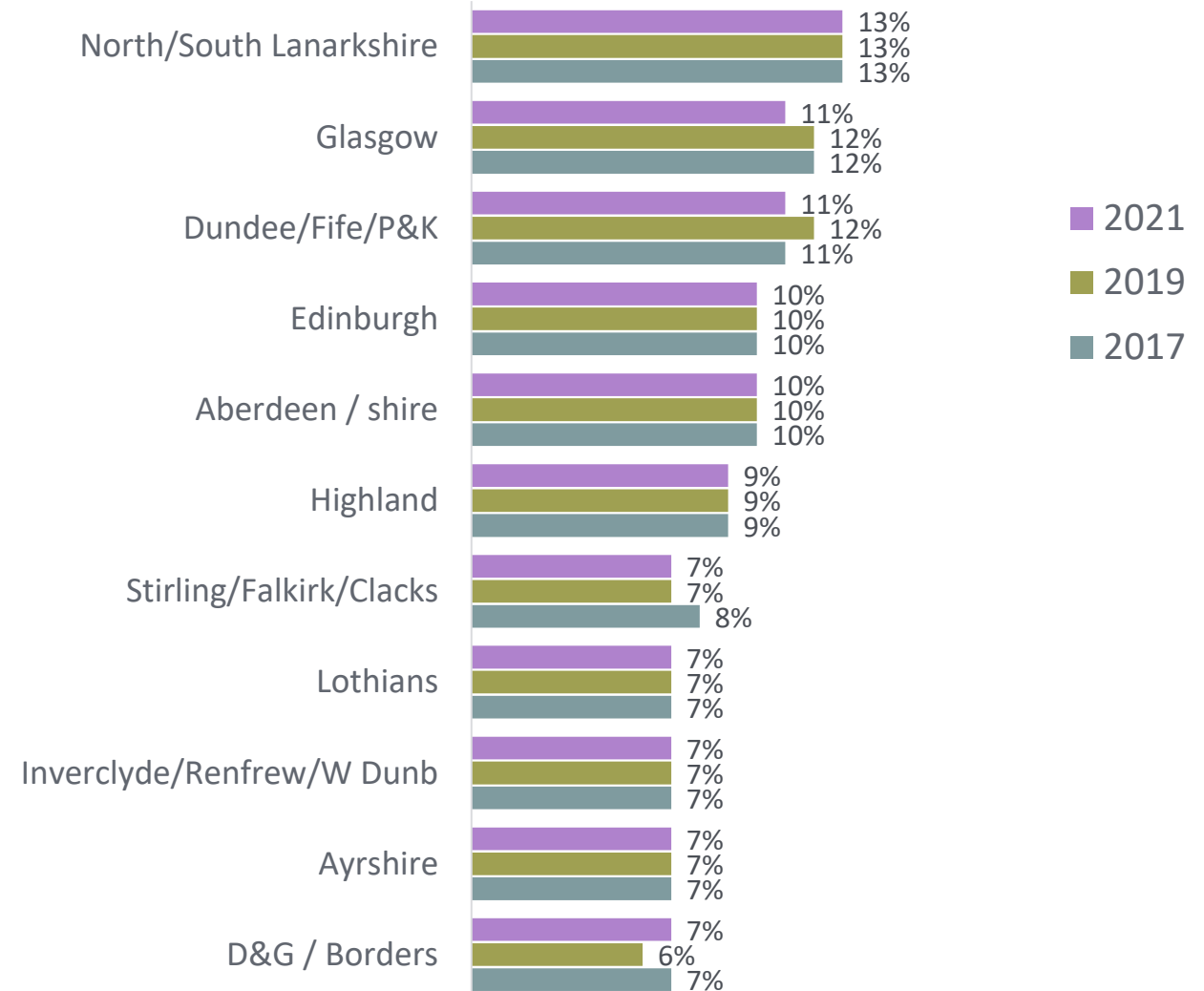
# Sample profile

# 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.
- Geographical profiles across the 3 waves of research are very closely matched.

## Local authority





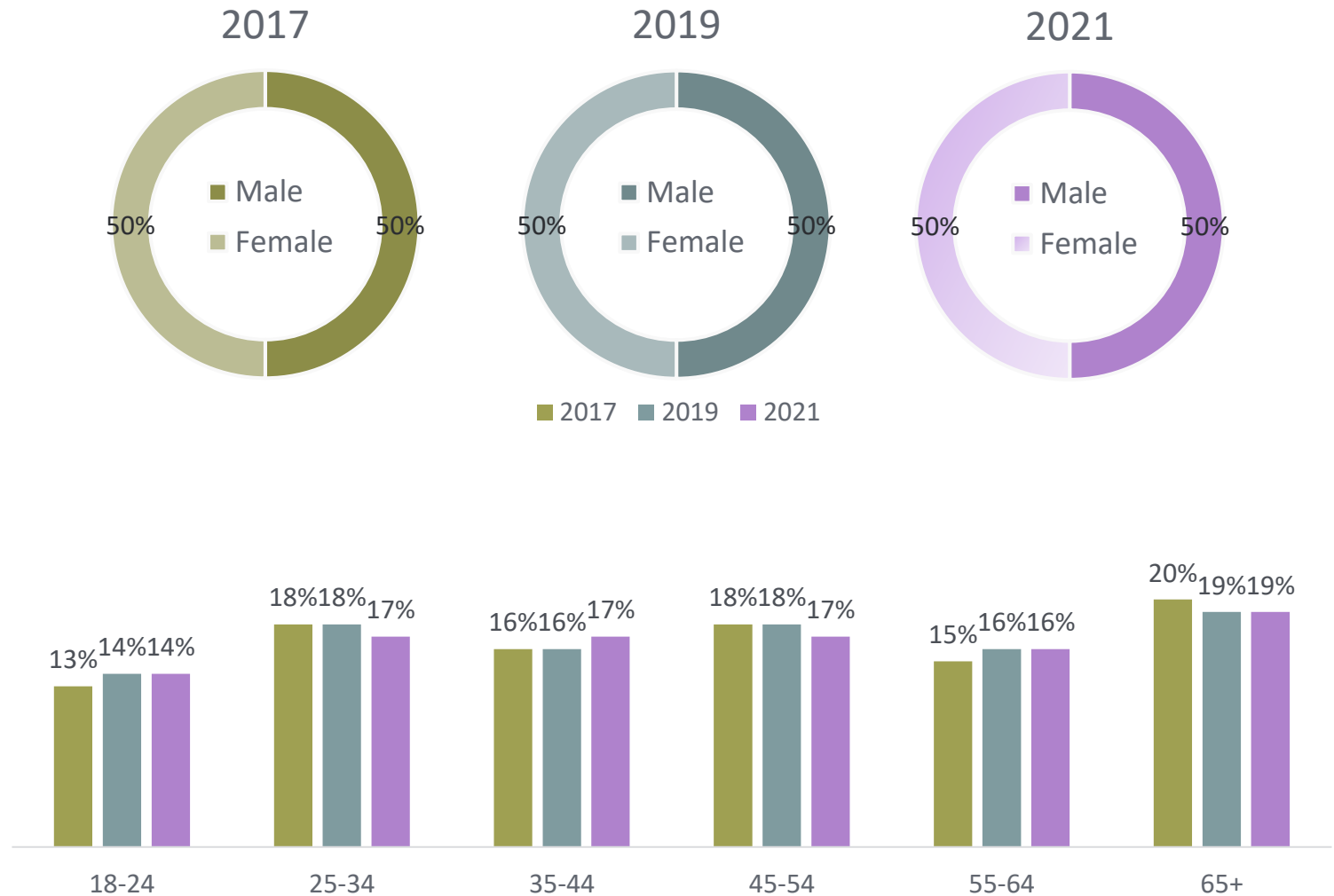
# Sample profile

## Age and gender

- Quotas were set on age and gender to broadly reflect national Scottish statistics.
- The sample was evenly split between males and females for all 3 waves of research.
- A representative spread of age groups was also included in the sample at each wave of research.

Note: Males include trans males and females include trans females.

## Age and gender



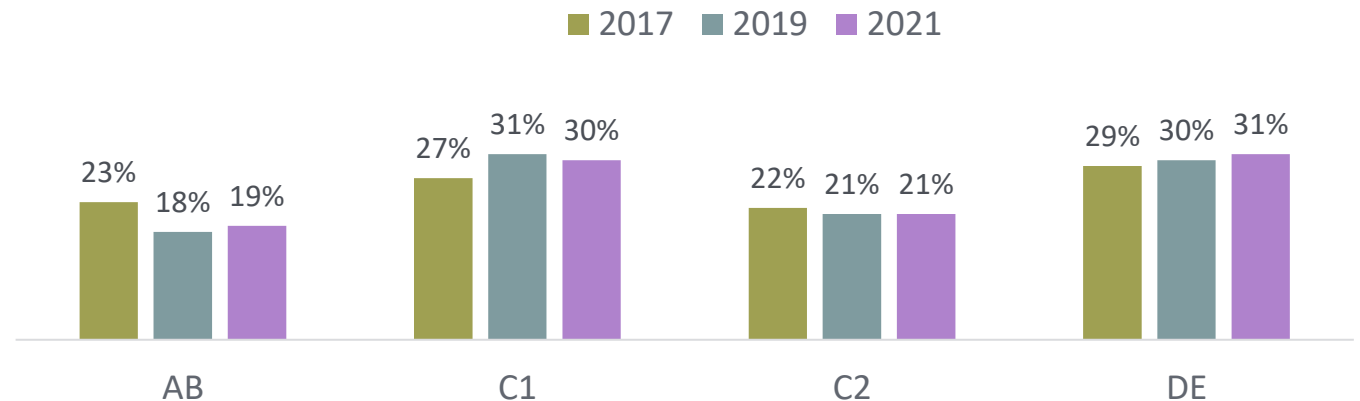
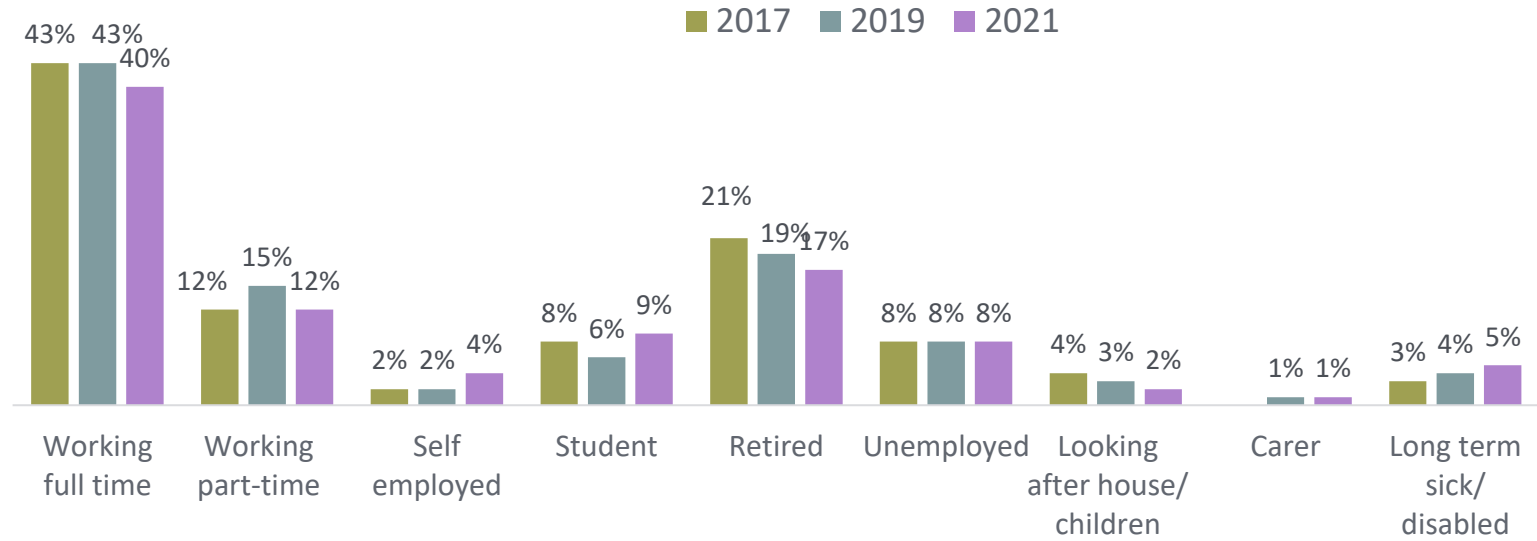
# Sample profile

## Socio-economic

- Quotas were also set on socio-economic group – approx. 50% ABC1; 50% C2DE.
- The 2021 sample’s socio-economic profile was very closely aligned to 2019. All 3 samples were broadly representative of Scottish population statistics (AB 19%, C1 31%, C2 24%, DE 26%).
- Working status was left to natural fall out. This has come in broadly consistent with national statistics.
- The working status profile was broadly similar across the 3 waves of the tracker, but the 2021 sample had fewer retired people than 2017.



## Working status and SEG



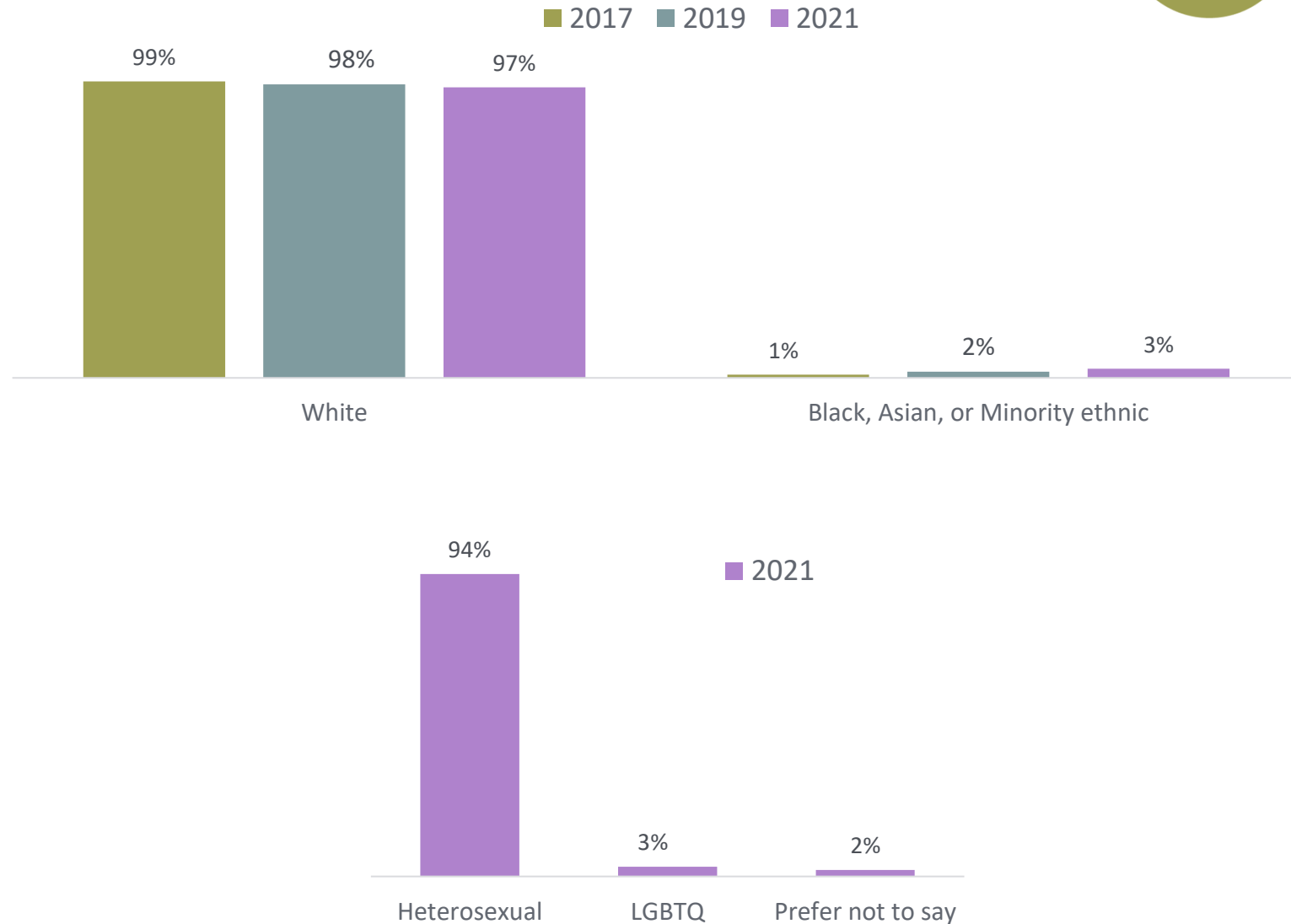
# Sample profile

## Minority groups

- Three percent of the 2021 sample were of Black, Asian or minority ethnic origin. This is similar to the population average of 4%\*.
- The proportion of BAME respondents in the sample has increased each year of the tracker.
- In 2021, 3% of respondents were lesbian, gay, bisexual, transgender or queer. This is similar to the population average of 2%\*. This question was not asked in previous waves.

\*Sources: Scottish Government and Office for National Statistics

## Ethnicity and sexual orientation

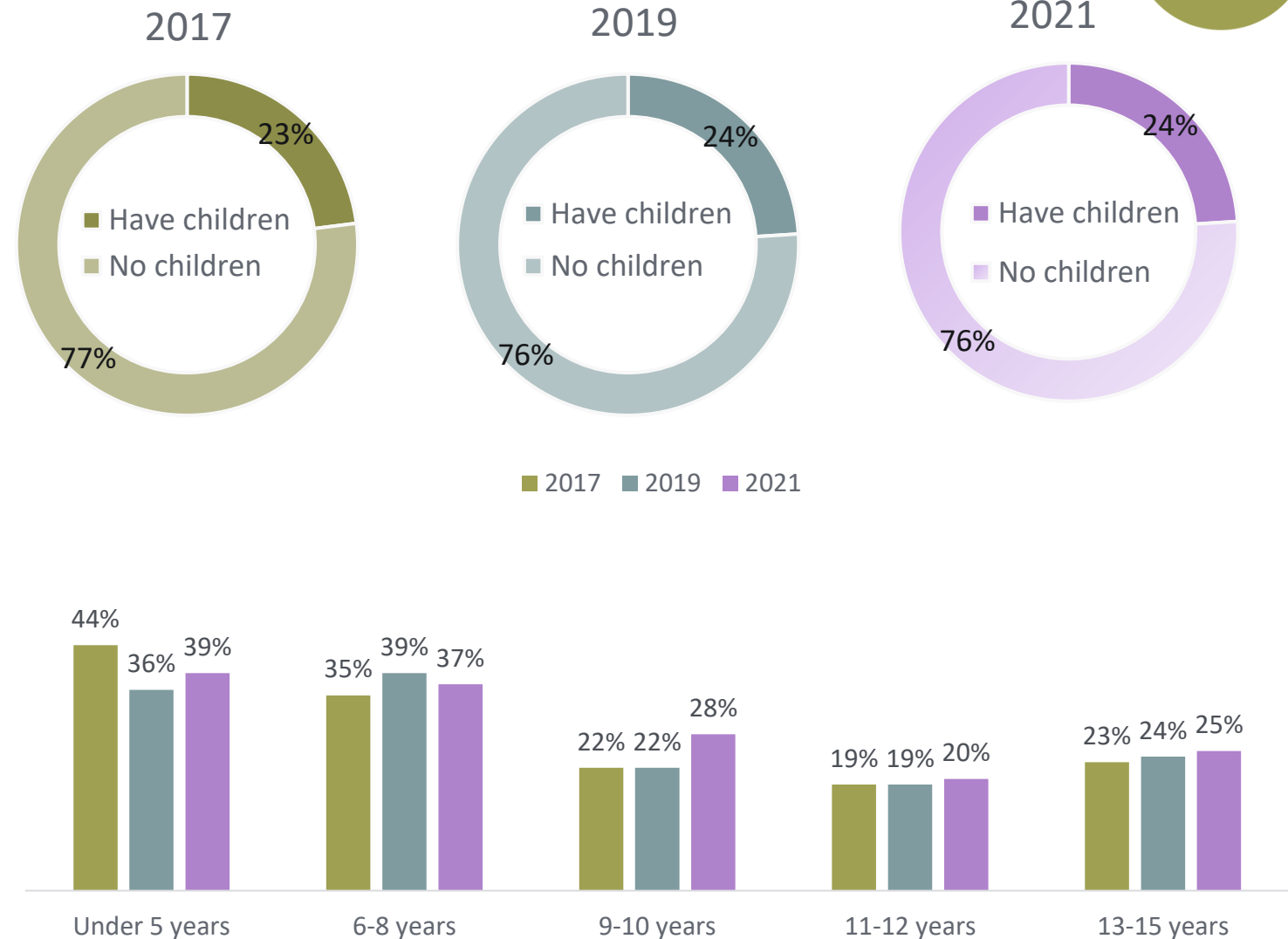


# Sample profile

## Children

- Almost one quarter of respondents across all 3 waves had children under 16 years old in the household.
- The ages of children were skewed to younger age groups. No significant differences between the waves of the tracker.
- 79% of parents in 2021 had children aged between 6 and 15 years old – and therefore have potential to cycle.

## Children in household



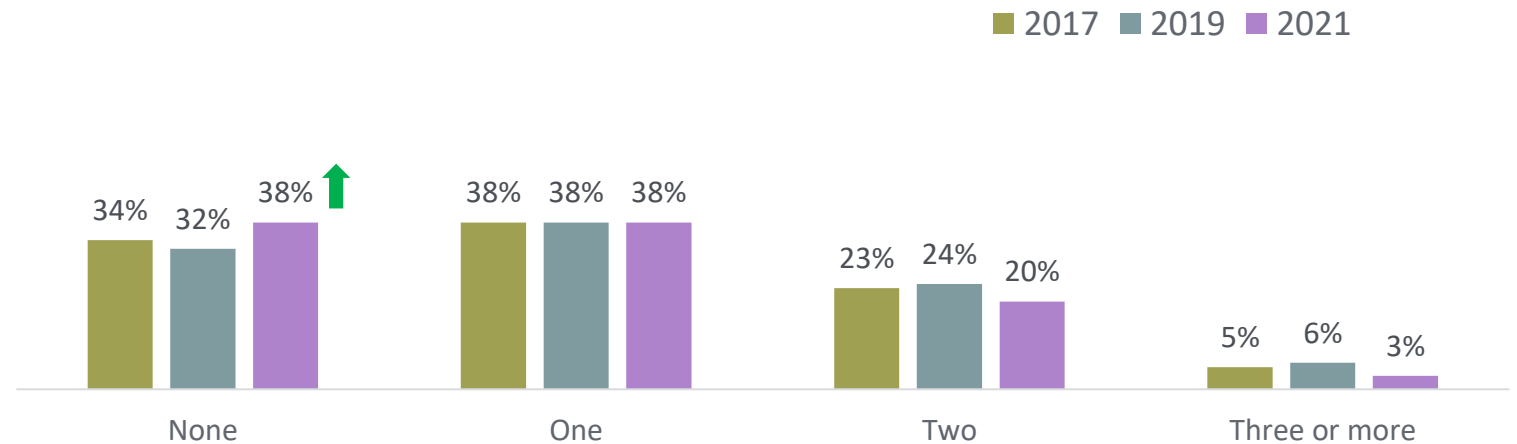
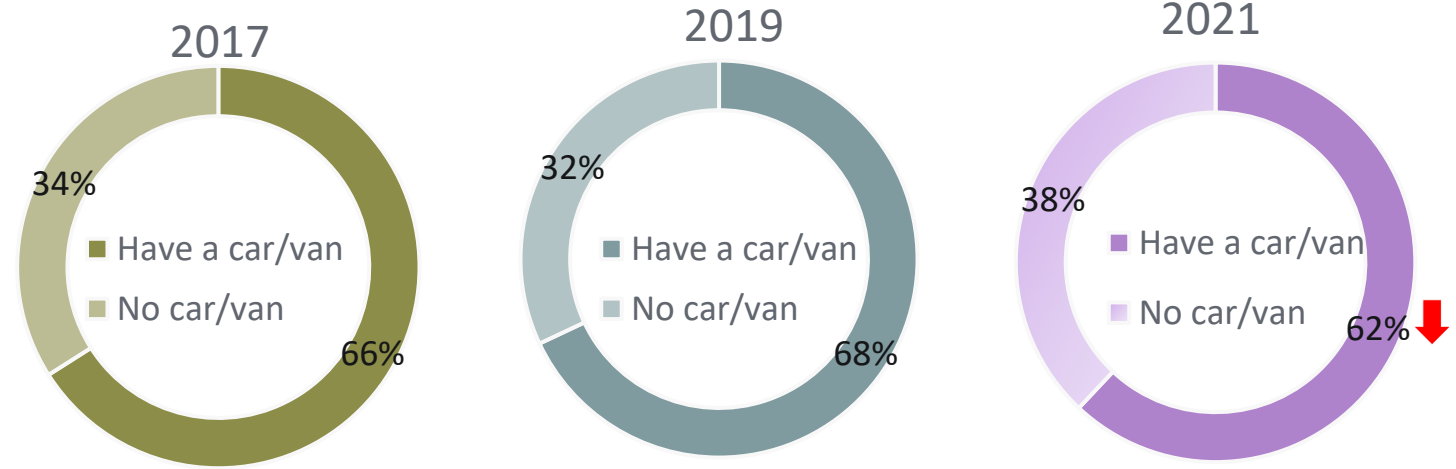
Base (all) 2017: 1060, 2019: 1049, 2021: 1029  
 Base (all with children) 2017: 248, 2019: 249, 2021: 242

# Sample profile

## Car ownership

- Over three fifths of respondents (62%) reported having access to a car or van in the household in 2021.
- This is slightly fewer than in 2019 (68%).

## Cars/vans in household



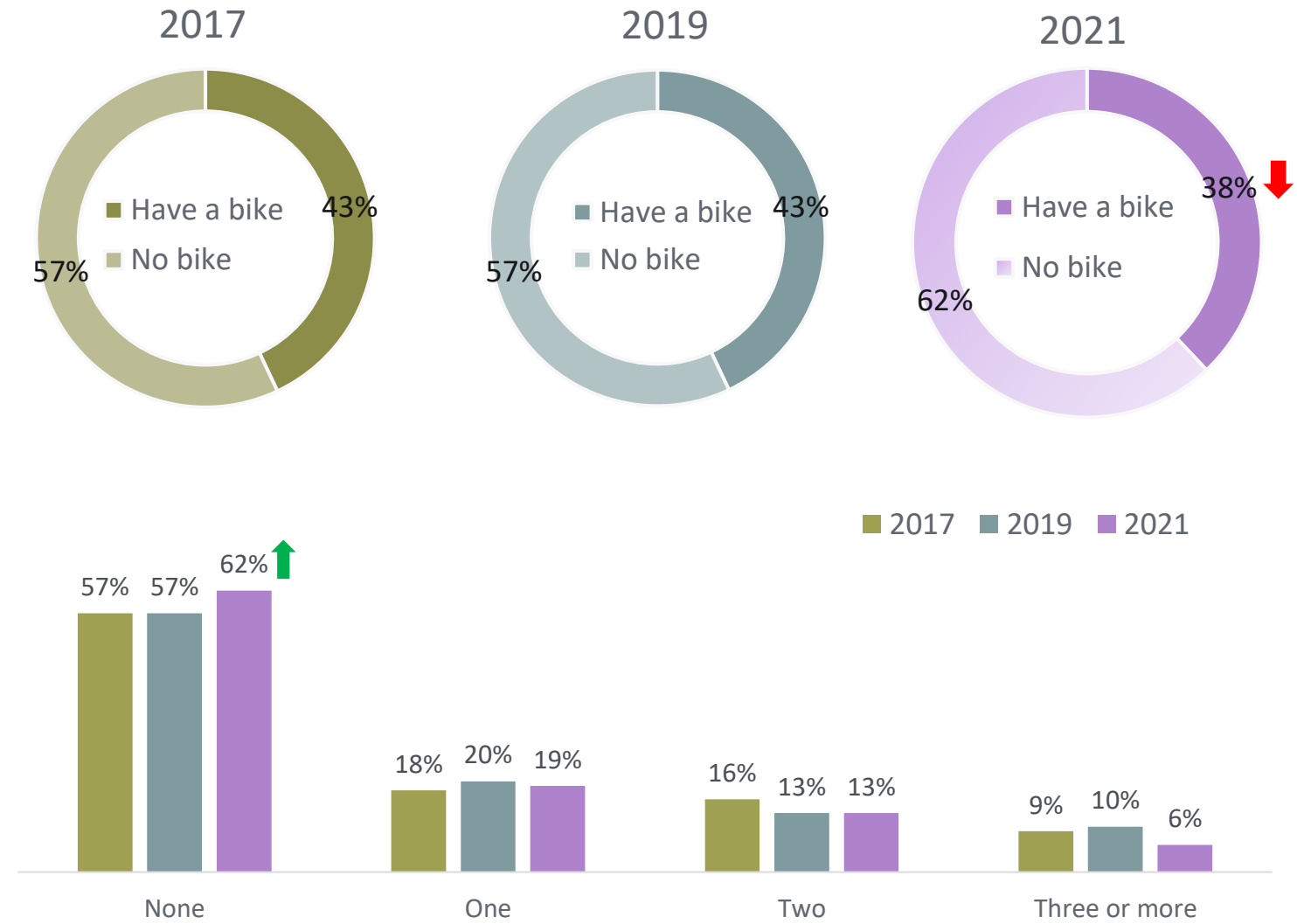
Q24: How many cars or vans do you own, or are available for use, in your household?

# Sample profile


## Bicycle ownership

- Almost two fifths of respondents (38%) in 2021 reported having access to an adult bike in their household.
- This is slightly lower than the proportion having access to a bike in the household in 2017 and 2019.
- Three quarters (76%) of respondents reported that they have somewhere convenient and safe where they could store a bike. For most (74% of total sample) this was at their property.
- One in five (20%) reported that they did not have somewhere they could store a bike. Most of these respondents (80%) reported this was because they had insufficient space in their home.

## Adults bikes in household



Q23: How many adult bicycles do you own, or are available for use in your household?  
 Q25: Do you have somewhere to conveniently and safely store a bike where you live?  
 Q26: Which of the following reasons mean that you don't have anywhere convenient or safe to store a bike where you live?



# Transport choices

# Transport choices

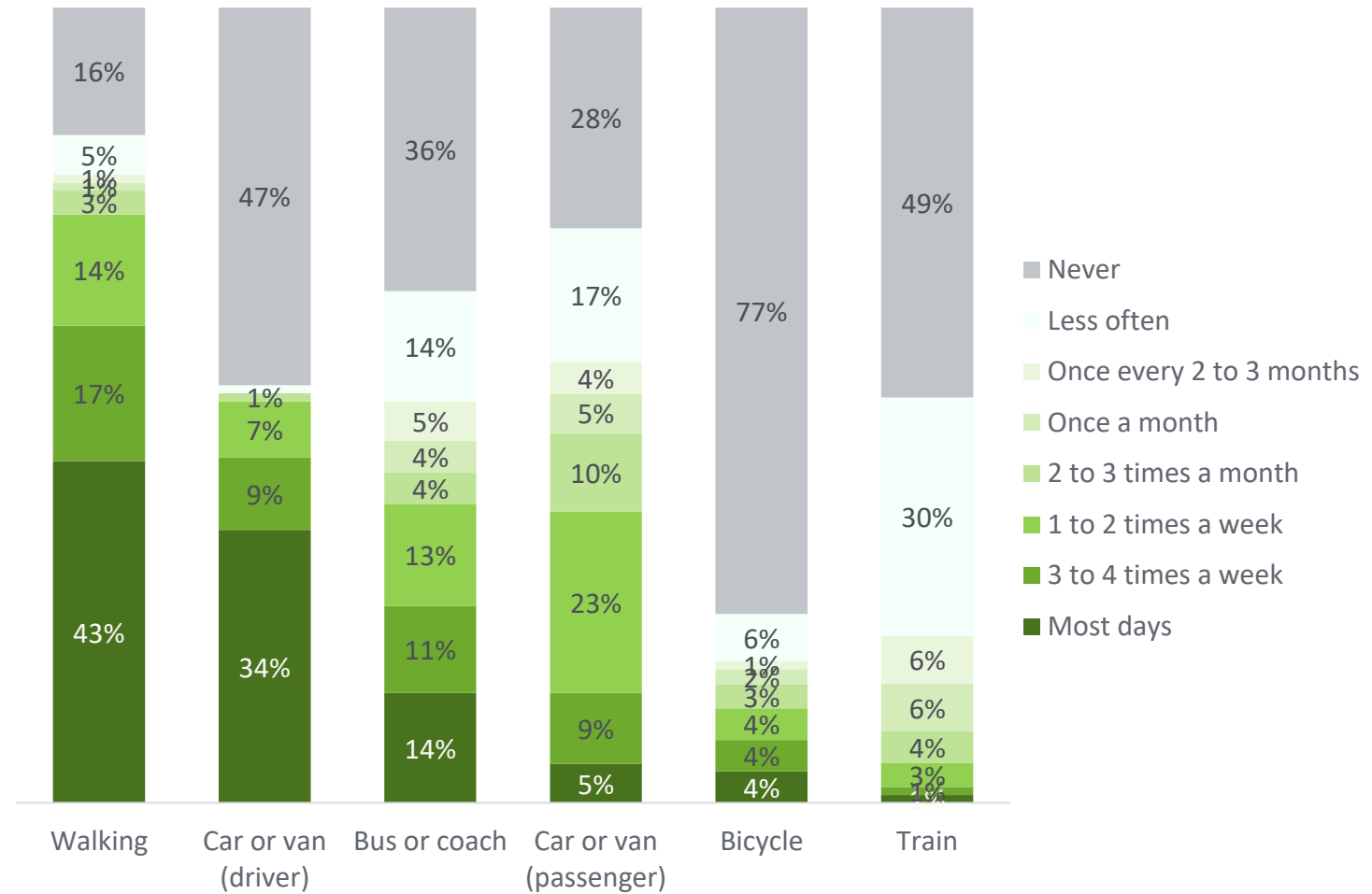
## Frequency

- As we have seen in previous waves, walking was the most frequent mode for everyday journeys - 74% walk at least once a week, with 43% walking most days.\*
- 53% of respondents reported that they ever drive, with 34% driving most days, while around two thirds ever use a bus or coach, with 38% travelling by bus at least once a week.
- One quarter of the sample reported that they ever cycle for everyday journeys, with 12% cycling for everyday journeys at least once a week.
- Those most likely to ever cycle for journeys were males (28%, females 18%), 18 – 24 year olds (39%) and 25 – 34 year olds (30%), and those in socio-economic groups (SEG) ABC1 (31%, C2DE 17%).
- Males were more likely to cycle at least once a week (15%) compared to females (9%).

\*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 - 2021): 1029



# Transport choices

## Frequency

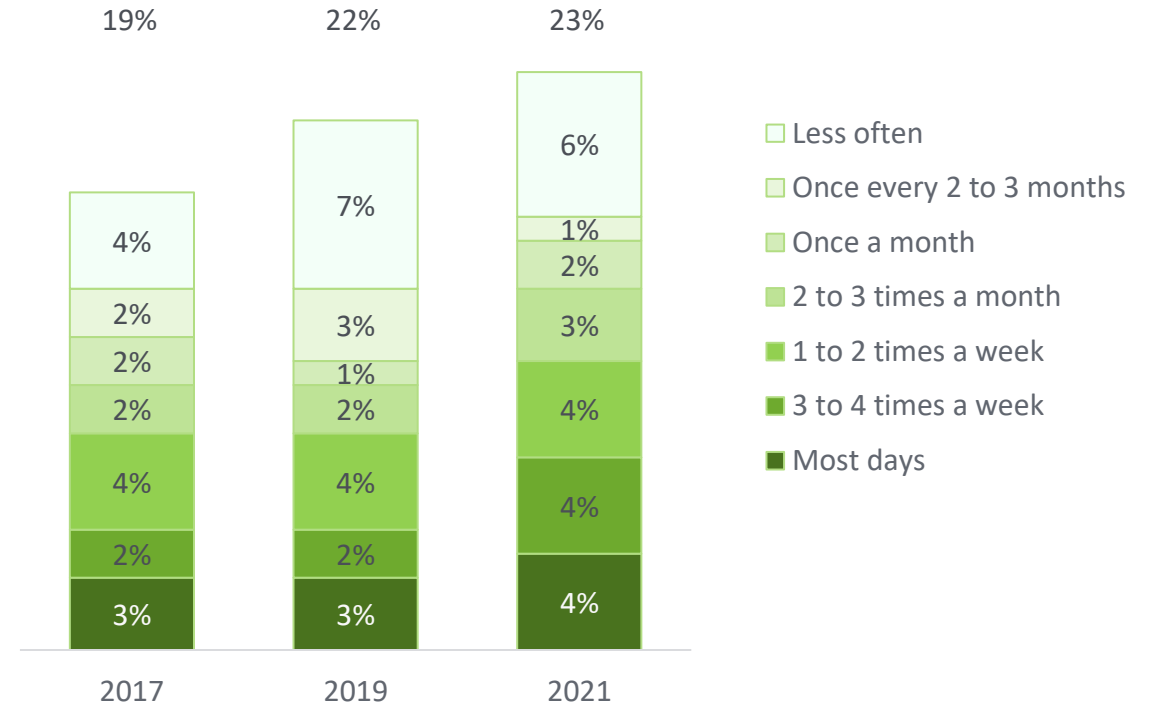
- The proportion of people cycling for everyday journeys has seen an upward trend since 2017, when 19% cycled compared to 23% in 2021.
- There has also been an increase in the proportion cycling at least once a week, from 9% in 2017 and 2019 to 12% in 2021.
- Although the overall proportion cycling for everyday journeys is consistent between 2019 and 2021, the proportion of younger people cycling has increased – from 27% of 18 to 24 year olds in 2019 to 39% in 2021.

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



Total who cycle for everyday journeys

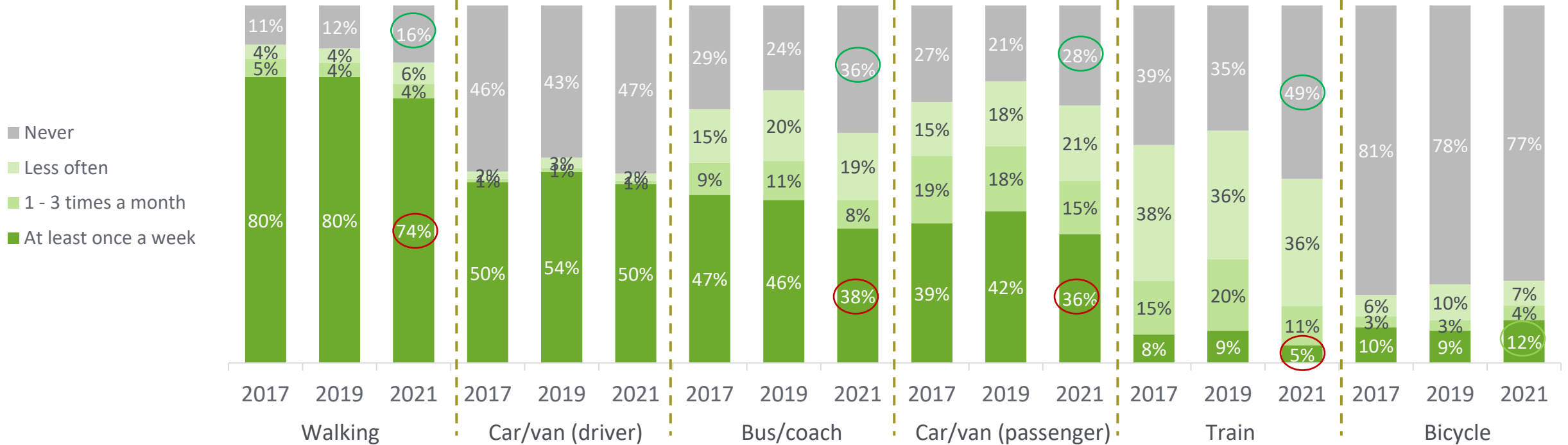


Base(all): 2017: 1060; 2019: 1049; 2021:1029

# Transport choices



Usage of public transport has decreased in 2021, likely due to impact of pandemic



- Compared to the previous waves of the tracker there have been some interesting shifts in findings in 2021, most of which are likely to have been as a result of the coronavirus pandemic.
- In particular, fewer respondents reported using public transport at least once a week – perhaps as a result of more people working from home and concerns about mixing with other people on buses and trains.
- There was also a slight decline in the proportion walking or travelling as a passenger in a car for everyday journeys.
- Cycling was the only mode of transport that saw an increase in frequency of usage, from 9% cycling at least once a week in 2019 to 12% in 2021.

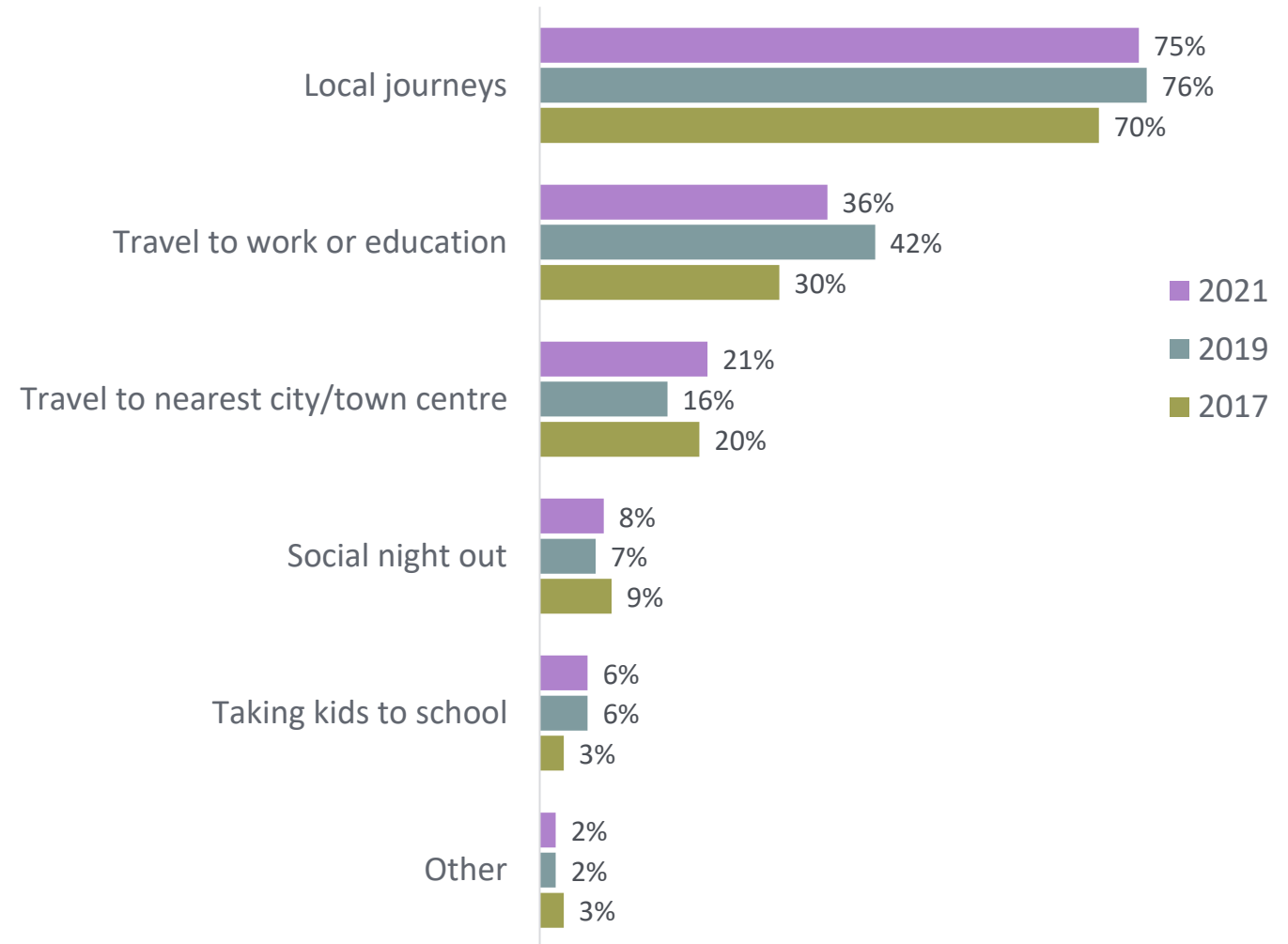
# Transport choices

## Journey types

- One in six (17%) of the sample reported that they cycle for everyday journeys at least once a month (13% in 2017 and 12% in 2019).
- There was consistency across the three waves of research in terms of the main type of journey, cycling is predominantly used for local journeys.
- Just over one third of people who travel by bike said they cycle for their commute. This is a similar proportion compared to the previous waves of research.
  - Younger respondents were more likely to cycle for their commute than those in older age groups – 49% of 18-34s, compared to 27% of 35-54 and 20% of 55+.

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) 2017: 137, 2019: 130, 2021: 170

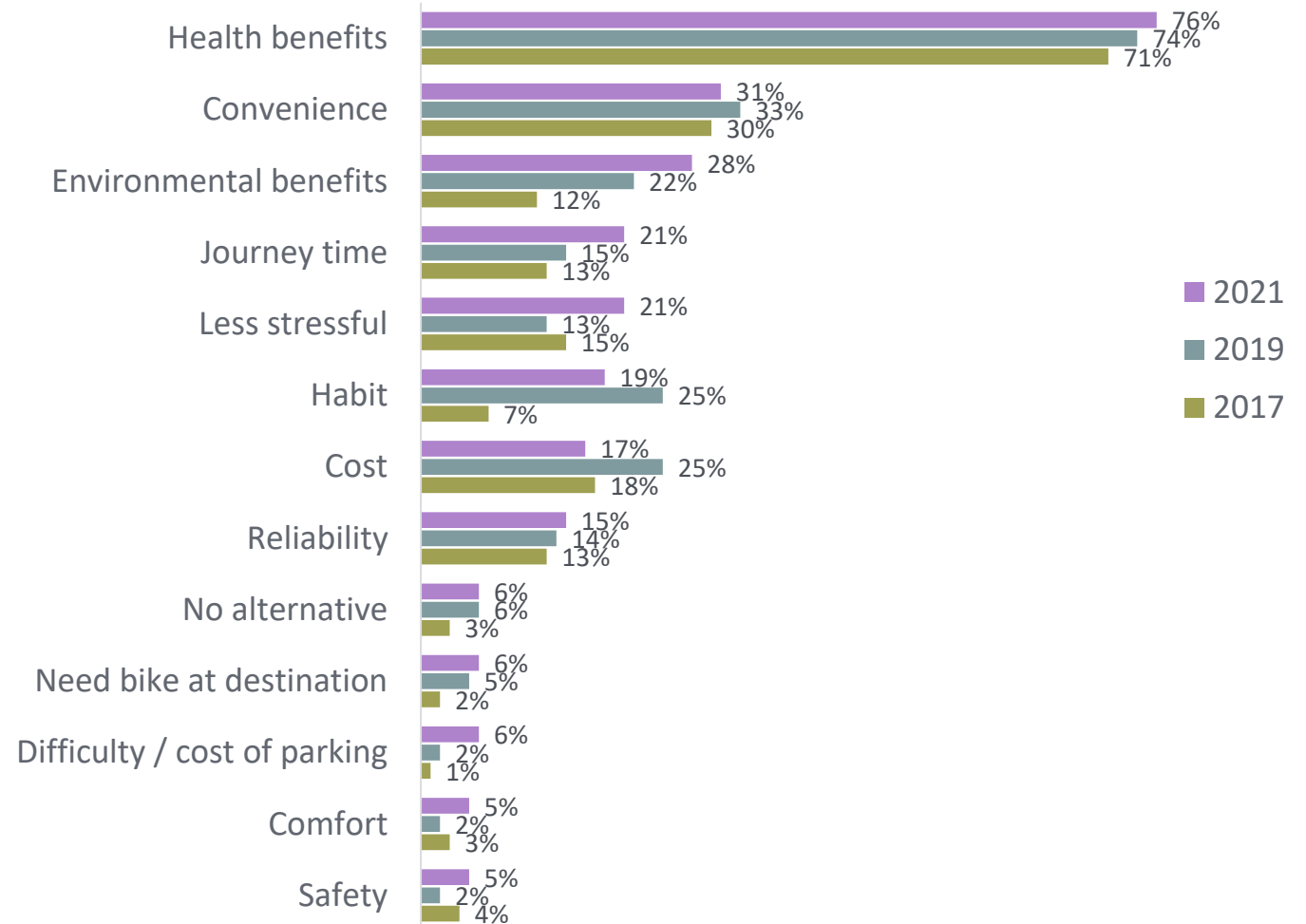
# Transport choices

## Reasons

- As we have seen over the waves of the tracking study, the main reason for cycling for everyday journeys is to improve health. This was mentioned by around three quarters of people who cycle in all waves.
- Almost one third of people who cycle also mentioned convenience – again this was consistent between waves.
- Significantly, people who cycle were more likely to mention the environmental benefits of their choice of transport (28%) than people using any other transport type, and this has shown an increasing trend over time.
- A variety of other benefits was mentioned by the sample, including journey time, less stressful, habit and cost.

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, 2021:170



# Cycling behaviours

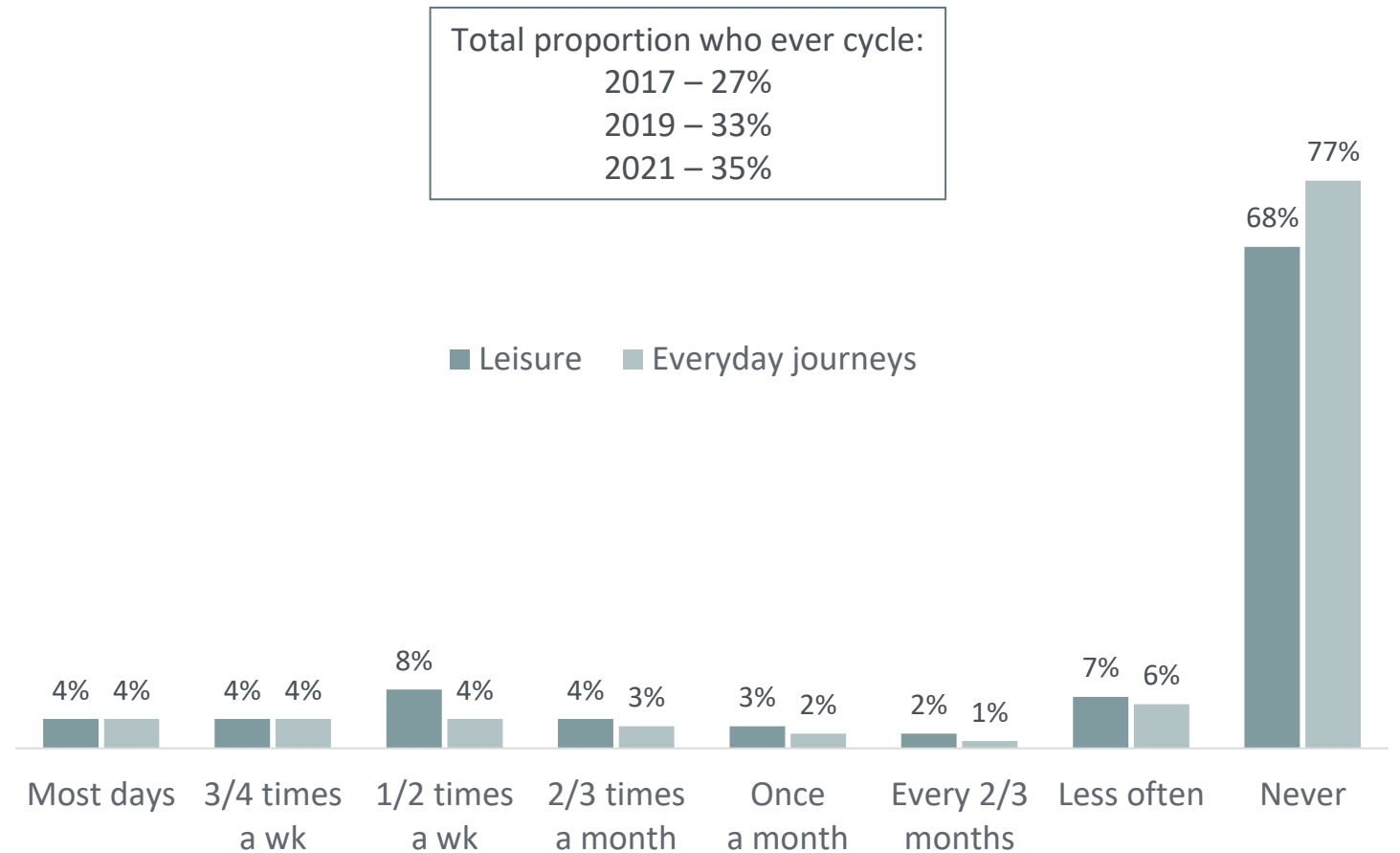
# Cycling behaviours

## Frequency

- In total 32% of respondents cycled for leisure and 23% cycled for everyday journeys at least occasionally.
- Combining both questions, 35% of the population ever cycle either for transport or leisure. This is consistent with 2019 (33%) but higher than 2017 (27%).
- People who cycle are most likely to be:
  - Males (41%, compared to 29% females)
  - Under 35 years old (48%, compared to 39% 35-54 and 18% 55+)
  - ABC1 socio-economic groups (43%, compared to 27% C2DEs)
  - Drivers (39%, compared to 30% non-drivers)



In 2021 more than one third of people cycle – an increase since 2017

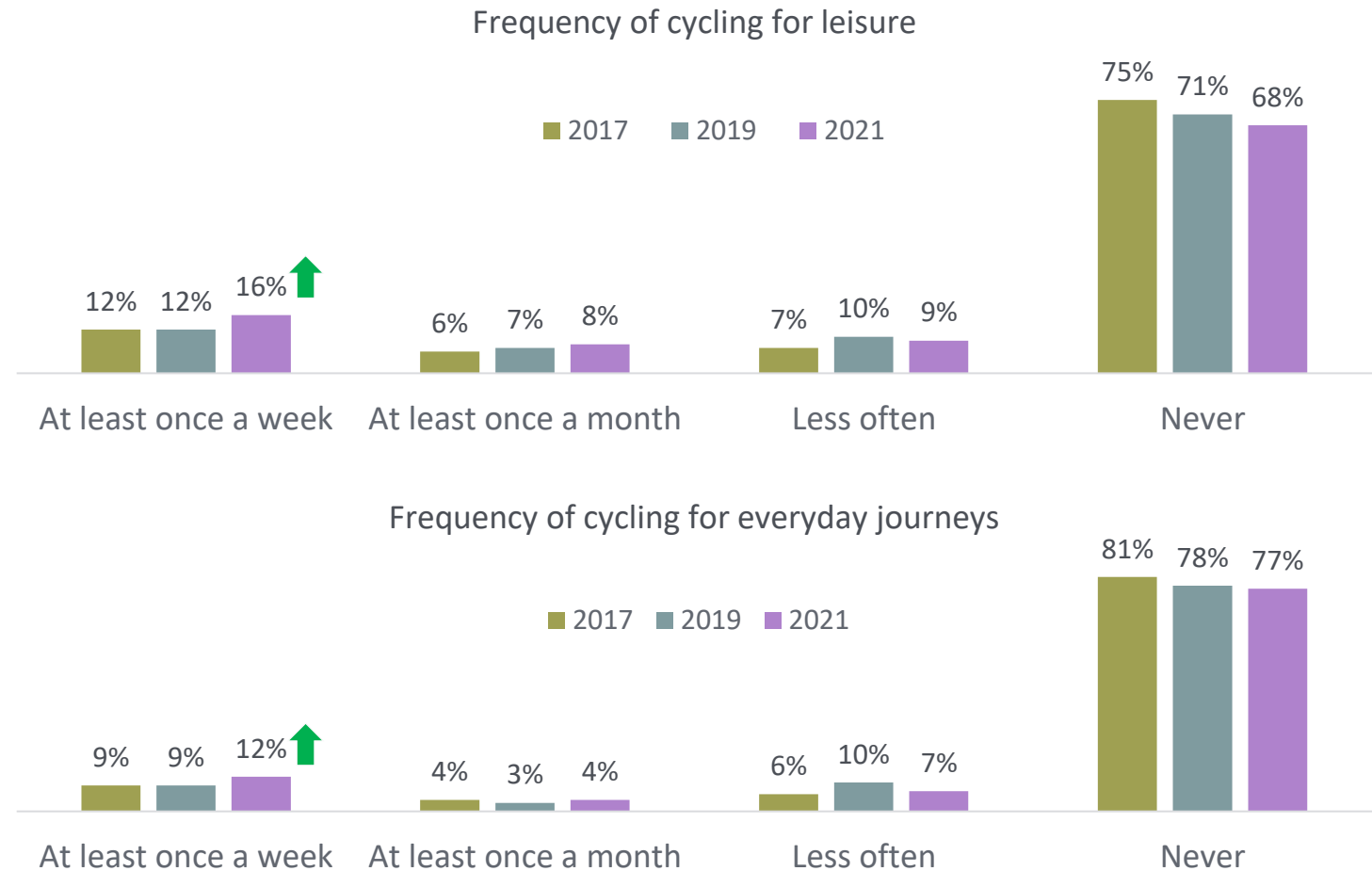


# Cycling behaviours

## Frequency

- The overall proportion of people who cycle for both leisure and for journeys was consistent between 2019 and 2021, although there is evidence of an increasing trend over the three waves of research.
- There has, however, been an increase in 2021 in the proportion who reported that they cycle at least once a week, for both leisure and transport.

There has been an increase in the proportion cycling at least once a week for both leisure and journeys



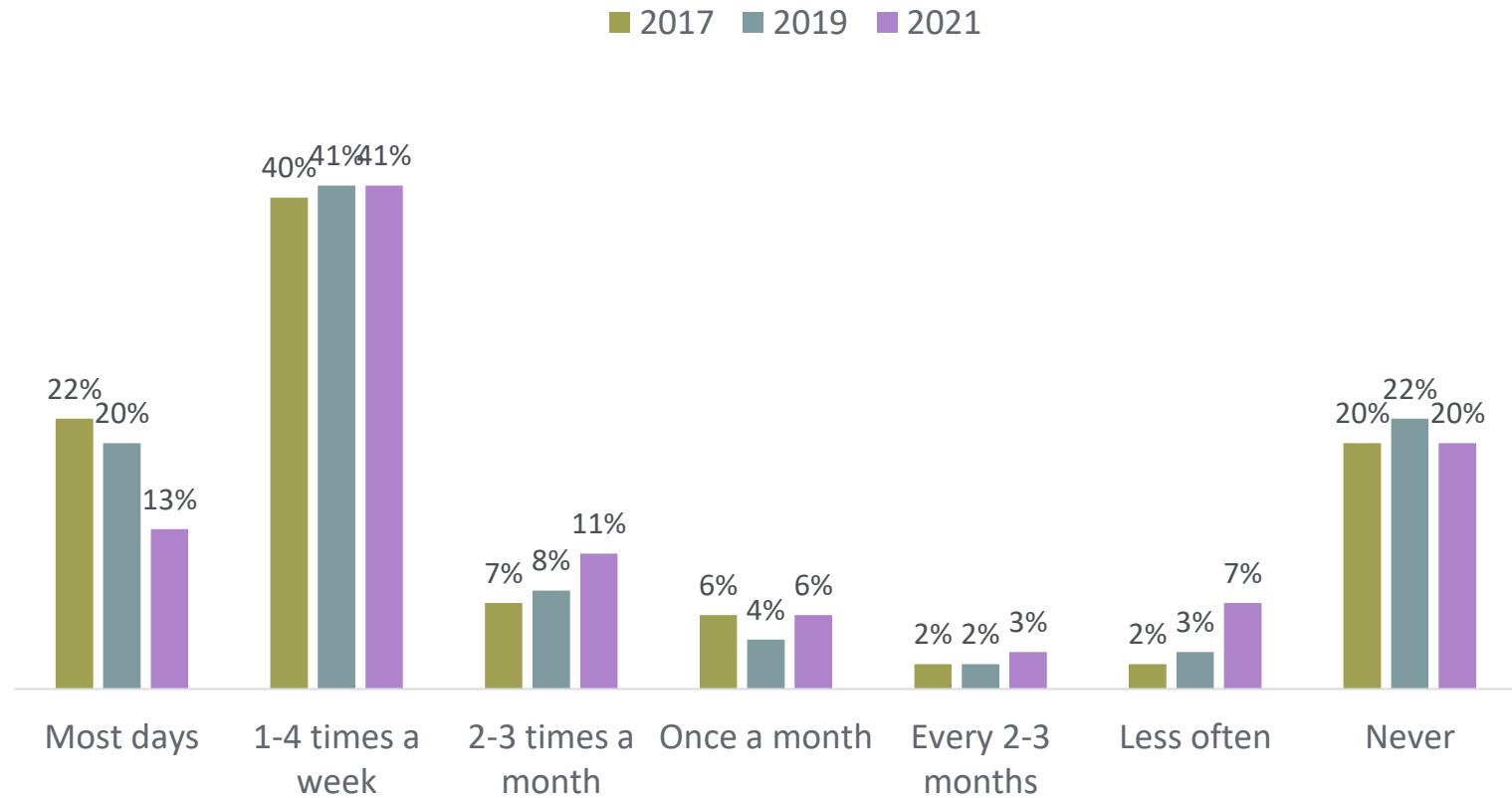
Base (all) 2017: 1060, 2019: 1049, 2021:1029

# 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 cycles. This proportion has been consistent over the three waves of the tracker.
- The majority of parents of children in this age group (53%) reported that their child cycles at least once a week – again the data is very similar to 2017 (62%) and 2019 (61%).

Four fifths of parents reported that their child ever cycles – consistent with previous waves



Q15: 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, 2021: 192



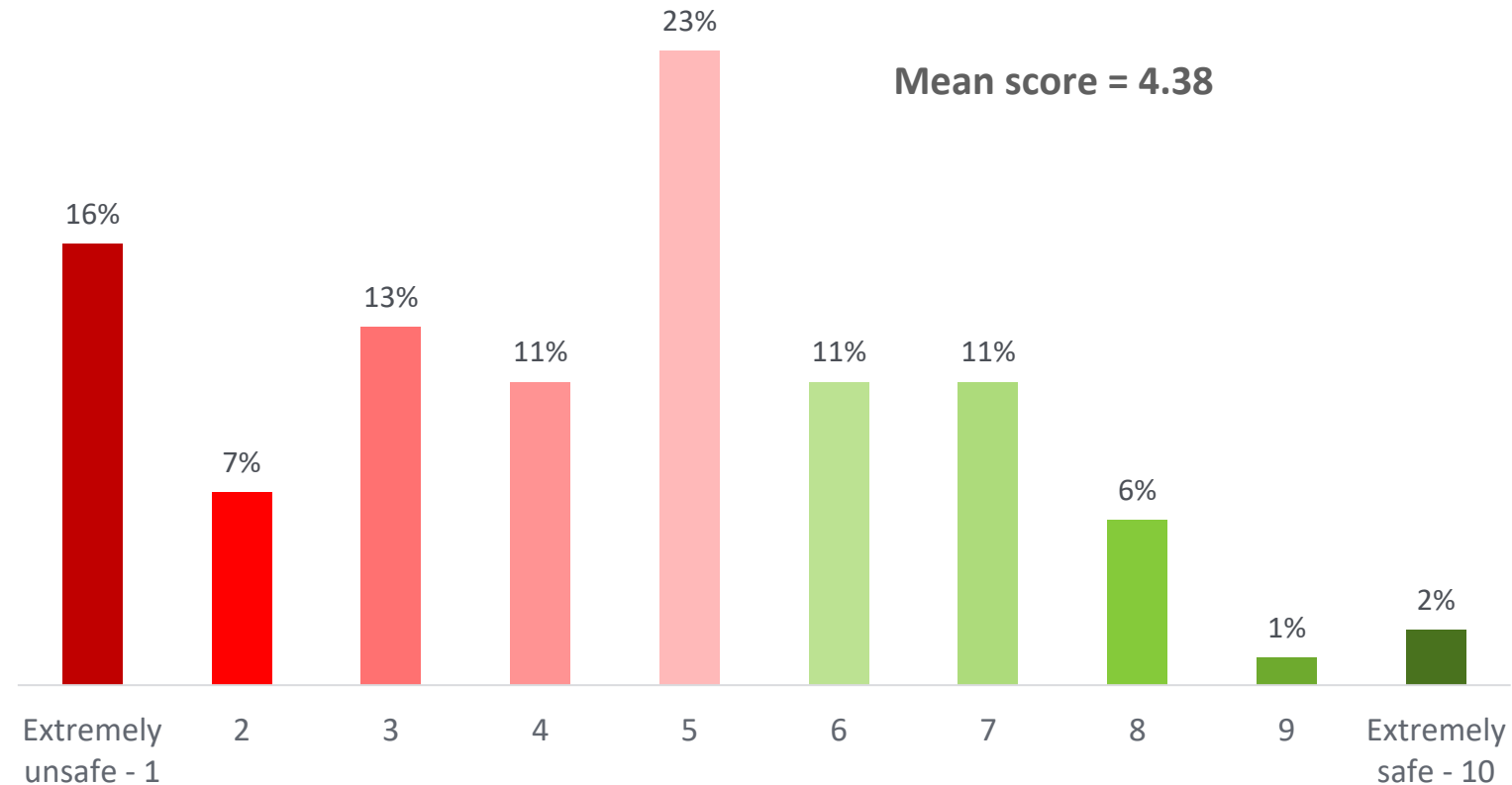
# Cycling behaviours

## Perceived safety for children cycling

- As we have seen in previous waves, there was clear concern about children cycling on the roads.
  - 70% rated the safety of roads for children cycling with a score of 5 or less
  - 16% gave the lowest possible score of 1 out of 10
- Respondents in the lower socio-economic groups were more likely to consider the roads in their local area as unsafe compared to the higher groups.
  - 21% of C2DE parents gave a score of 1 compared to 10% of ABC1 parents.

Q16: 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 remain concerned about the safety of children cycling on roads



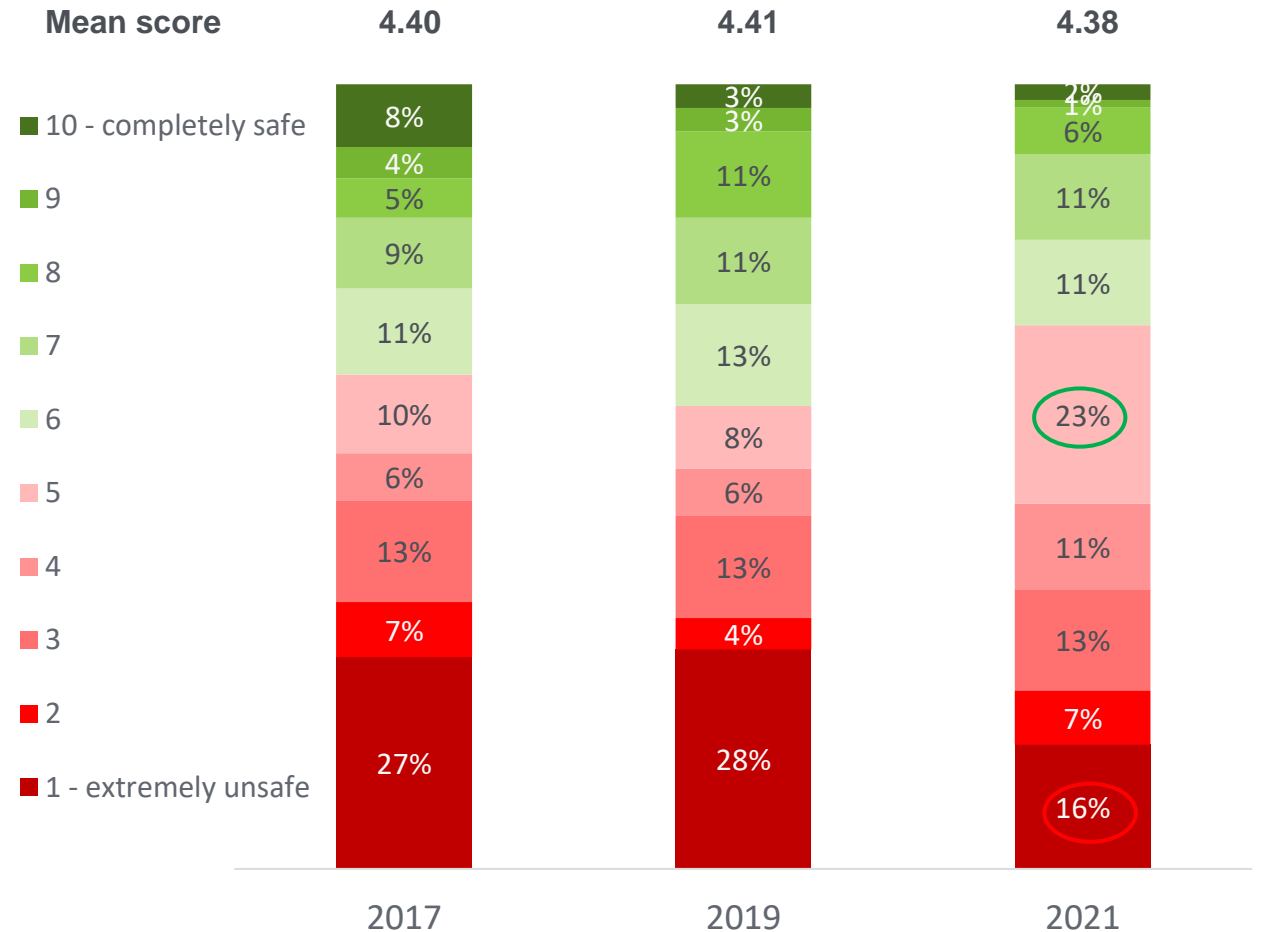
Base (all with children aged 6 to 15 yrs): 192

# Cycling behaviours

## Perceived safety for children cycling


- The overall mean score out of 10 for safety of Scotland's roads for children cycling has been consistent – on average the score remains around 4.4.
- However, a higher proportion rated safety with a score of 5 or less (59% in 2019 compared to 70% in 2021). Interestingly, fewer provided the lowest score of 1 (28% in 2019 compared to 16% in 2021).

More parents overall rate roads as unsafe, but the strength of feeling was weaker this year



Base (all with children aged 6 to 15 yrs) 2017: 285, 2019: 192, 2021: 192

Q16: 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?

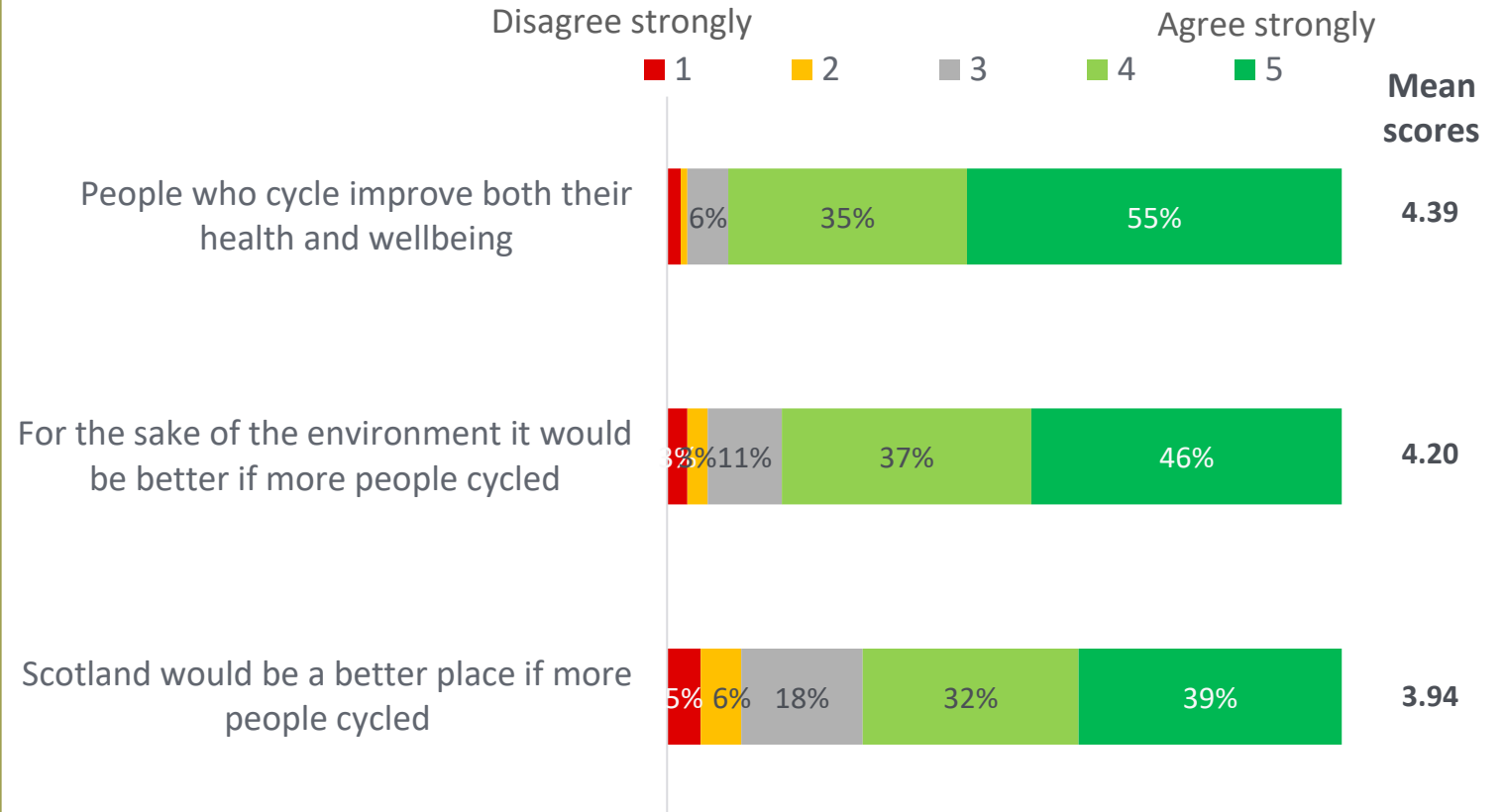


# Attitudes to cycling

# Attitudes to cycling

- In a general sense, people's attitudes towards cycling were very positive:
  - 90% agreed that people who cycle improve both their health and their wellbeing
  - 83% agreed that, for the sake of the environment, it would be better if more people cycled
  - 71% agreed that Scotland would be a better place if more people cycled

The majority of population continues to have positive attitudes towards cycling at macro level



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.

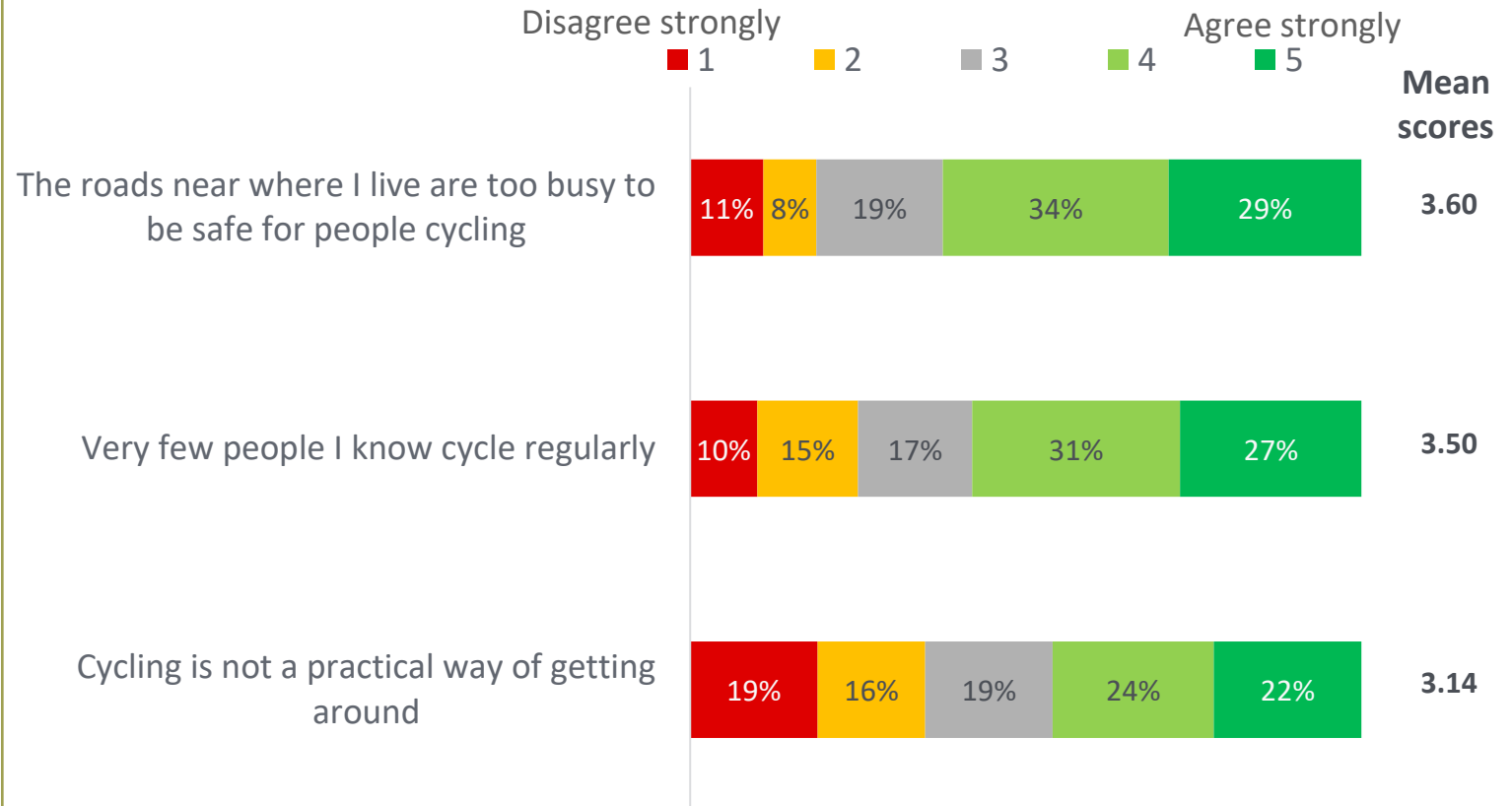
Base (all): 1029

# Attitudes to cycling

- A majority of respondents agreed that their local roads are too busy to be safe for cycling – 62% agreed and 19% disagreed.
- Over half of respondents also reported that very few people they know cycle regularly – 58% agreed.
- There was also more agreement than disagreement that cycling is not a practical way to get around – 46% agreed it's not practical while 35% disagreed.

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.

At personal level, however, many agreed barriers put them off cycling



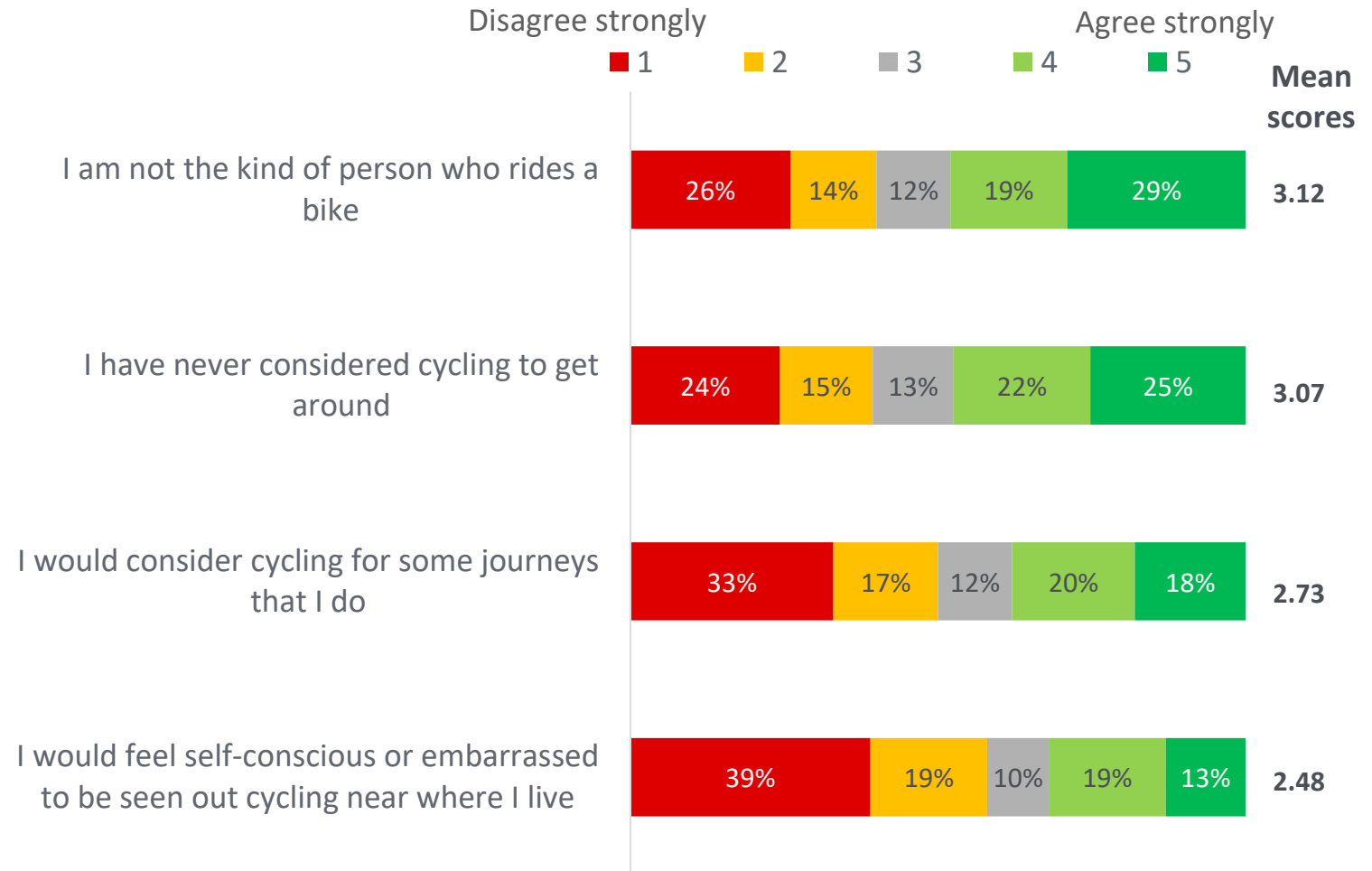
Base (all): 1029

# Attitudes to cycling

- Almost half of respondents (48%) just did not see themselves as the kind of person who cycles, although 40% disagreed with this statement.
- A third of respondents also agreed that they would feel self-conscious to be seen out cycling locally, again indicating that cycling is not something they would feel comfortable doing.
- Indeed, almost half (47%) agreed that they have never considered cycling as a way to get around before; however, over one third (38%) agreed that they would consider cycling for some journeys that they do.

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.

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

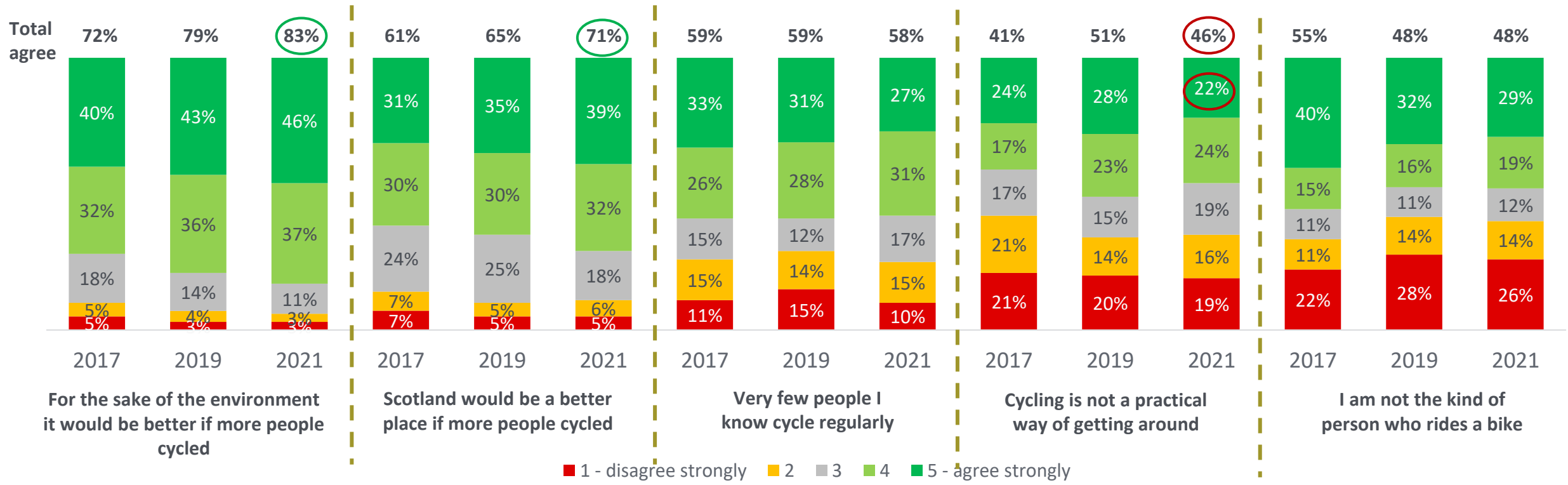


Base (all): 1029

# Attitudes to cycling



More people are recognising the benefits of cycling for Scotland and the environment



- There has been an increasing trend in agreement that for the sake of the environment, it would be better if more people cycled - from 71% 2017 to 83% in 2021. This finding reflects other data indicating increased environmental influence on decisions and attitudes (e.g. in reasons to cycle). More people also now agree that Scotland would be a better place if more people cycled than in 2017 or 2019.
- Further, the perception that practicality is a barrier has decreased this wave compared to 2019 (but is higher than in 2017).
- Agreement that 'I am not the kind of person who rides a bike' and 'very people I know cycle regularly' was consistent with 2019.

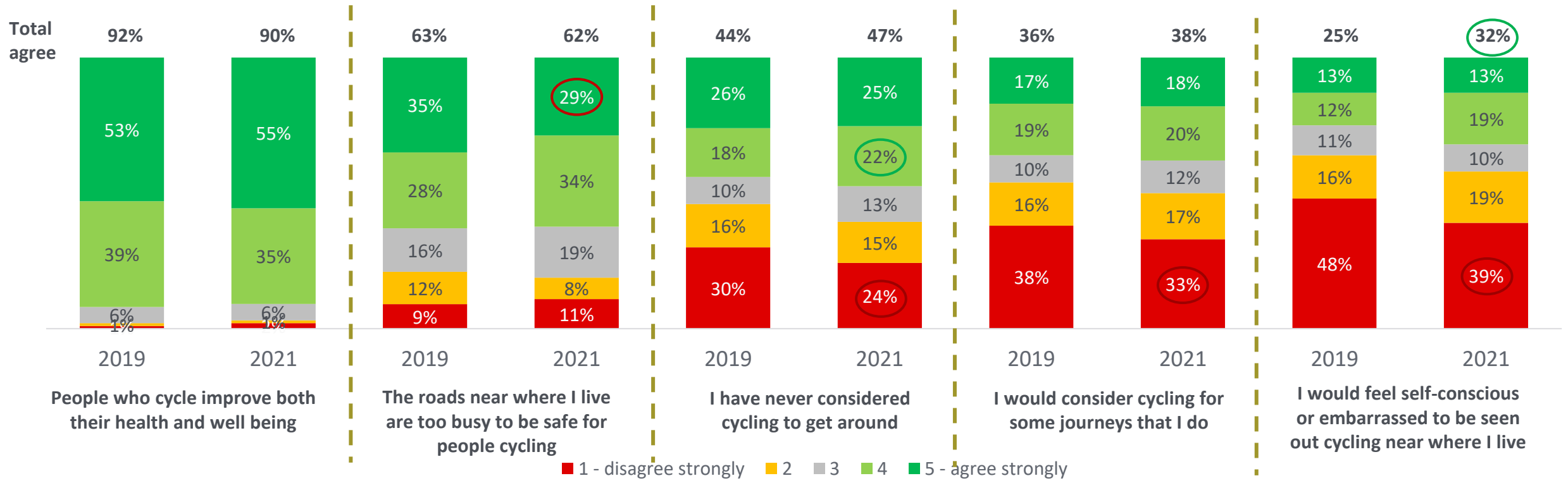
Q4: For each statement I'd like you to tell me how much you agree or disagree with that statement. Please provide a mark out of 5, where 5 is strongly agree and 1 is strongly disagree.

Base (all) 2017: 1060, 2019: 1049, 2021: 1029

# Attitudes to cycling



Most attitudes, positive and negative, are consistent between 2019 and 2021, but more agreed that they would feel self-conscious cycling this wave



- Most of these statements were consistent between 2019 and 2021 (statements did not appear in 2017 survey).
- There has been a decrease in strong agreement that local roads are too busy to be safe for cycling, indicating possible improved perceptions of safety on roads.
- Although overall agreement that ‘I have never considered cycling to get around’ was consistent, there has been a decrease in strong disagreement and an increase in slight agreement – again indicating a positive change since 2019.
- However, overall agreement that respondents would feel self-conscious or embarrassed cycling has increased, and strong disagreement has decreased in 2021.

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: 1060, 2019: 1049, 2021: 1029

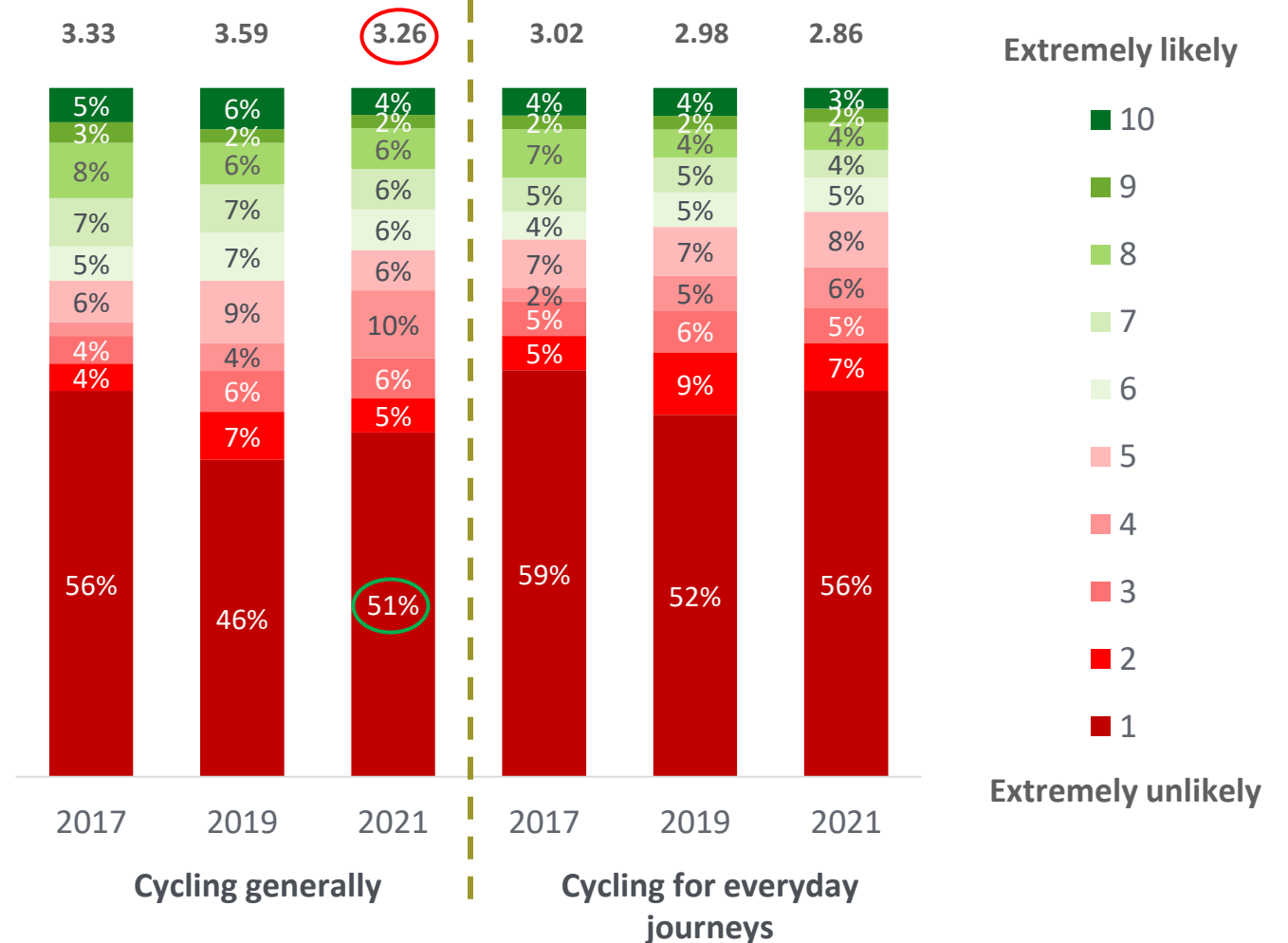


# Attitudes to cycling

## Propensity to increase cycling

- In 2021, 23% of respondents considered it likely (score 6 or more) that they will cycle more generally in the next 2 to 3 years, while 18% considered it likely that they will cycle more for everyday journeys.
- This represents a slight decline in propensity to cycle generally compared to 2019 when 29% scored 6 or more. Propensity to cycle for everyday journeys has been broadly consistent.
- There remains a core of people who reject cycling in the future – by scoring their likelihood with 1 out of 10. This increased in 2021 for cycling generally (from 46% to 51%) but remained lower than in 2017 (56%). For cycling for everyday journeys the proportion scoring 1 out of 10 has been broadly consistent over the three waves (differences not statistically significant).

There has been a slight decrease in propensity to cycle generally since 2019



Q7/8: 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?

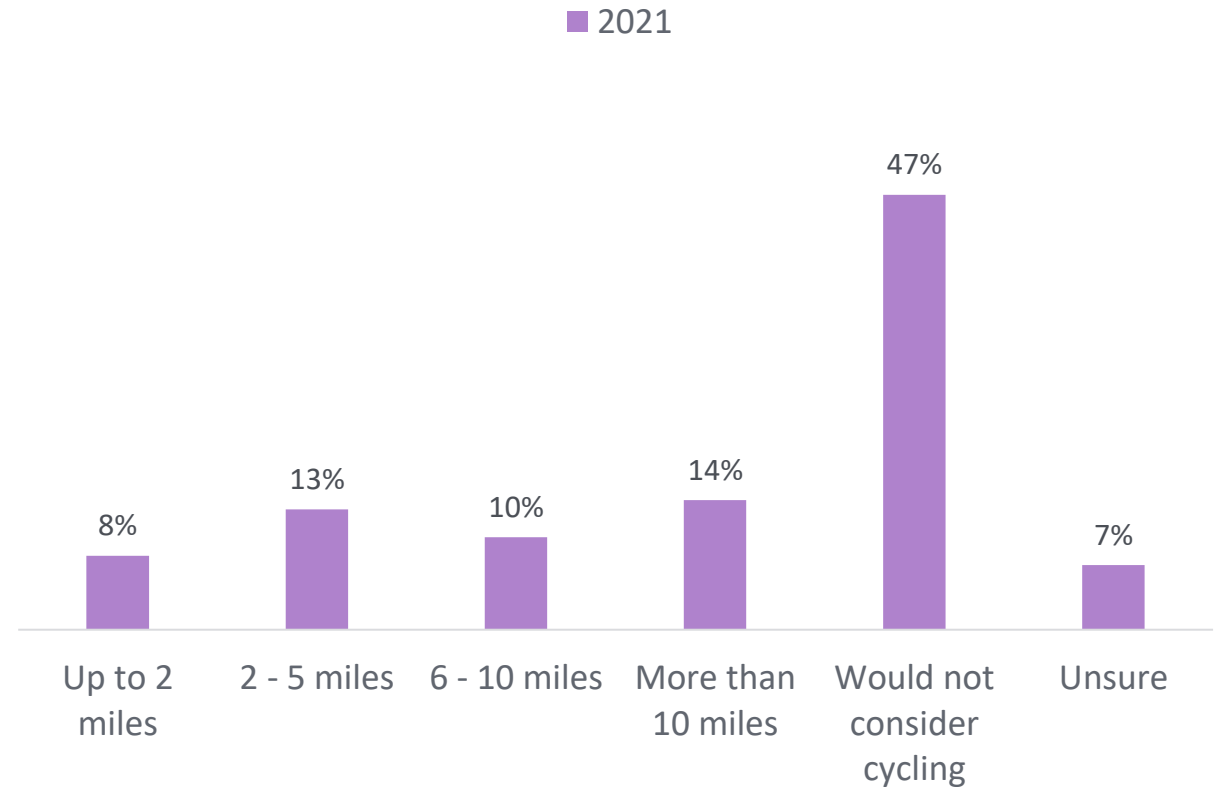
# Attitudes to cycling

## Distance willing to cycle

- The total sample were asked what would be the furthest distance they would consider cycling.
- Although almost half (47%) stated they would not consider cycling any distance. Amongst those who did provide a response the distances specified were widespread. Around one fifth (21%) would consider cycling up to 5 miles, whilst a quarter (24%) would consider cycling more than 5 miles.

Q6: What is the furthest distance you would consider cycling in a single trip?

Almost a quarter would consider cycling more than 5 miles



New question in 2021

Base (all) 2021: 1,209

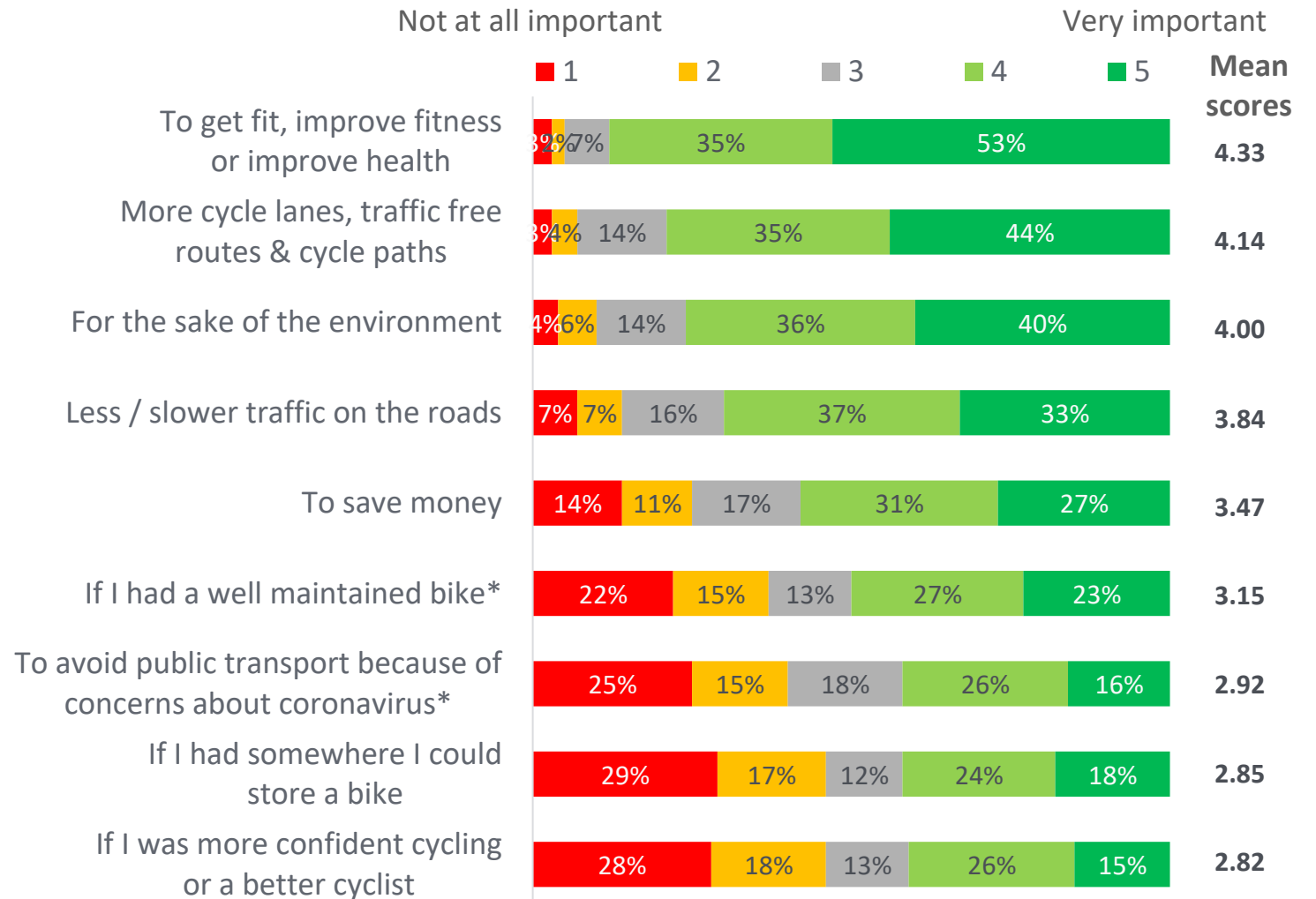
# Attitudes to cycling

## 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 previous waves, the motivating factors with the highest importance ratings were to improve health (88% important) and better cycling infrastructure (79% important).
- Three quarters would also be motivated by environmental concerns, while 71% would like to see less/slower traffic and 58% would be motivated by the chance to save money. All of these proportions are closely aligned to the 2017 and 2019 data.
- Confidence when cycling and access to a well maintained bike and bike storage space were important to a significant proportion of people – 50% for access to a well maintained bike, 42% for bike storage and 41% for confidence.
- It is also important to note that two fifths (42%) said that avoiding public transport because of coronavirus was a potentially important incentive to cycle.

Q9: 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



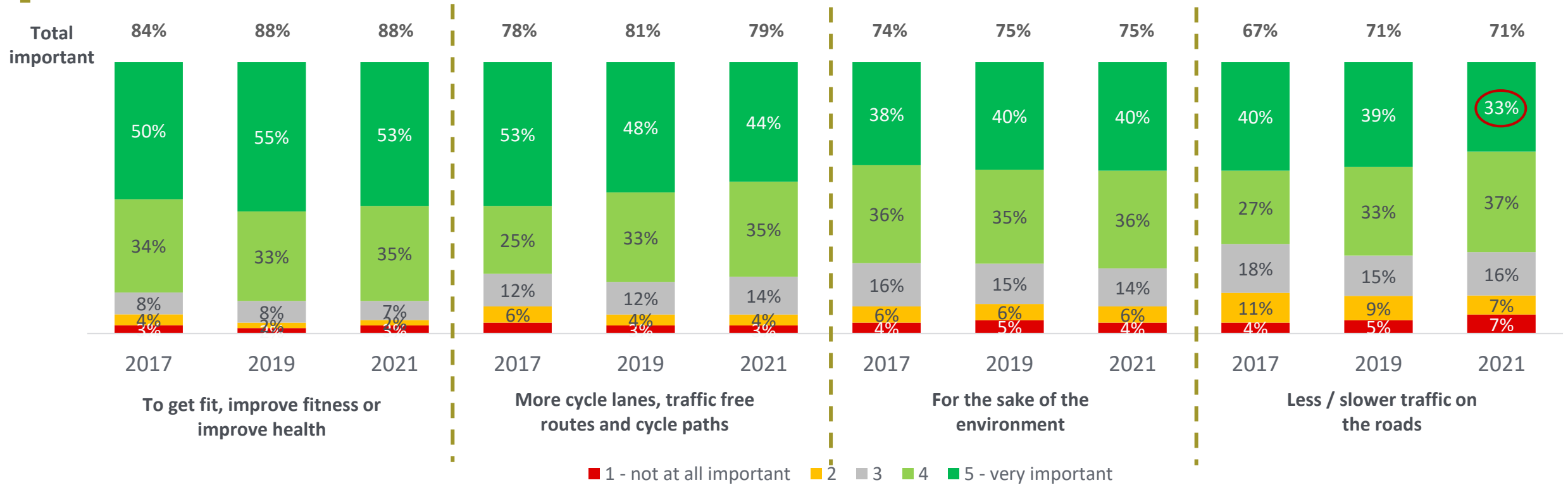
\*New options added in 2021

Base (all who score 3 or more for propensity to cycle – Q9/Q10): 466

# Attitudes to cycling



Importance of top motivations to cycle were consistent over the three waves

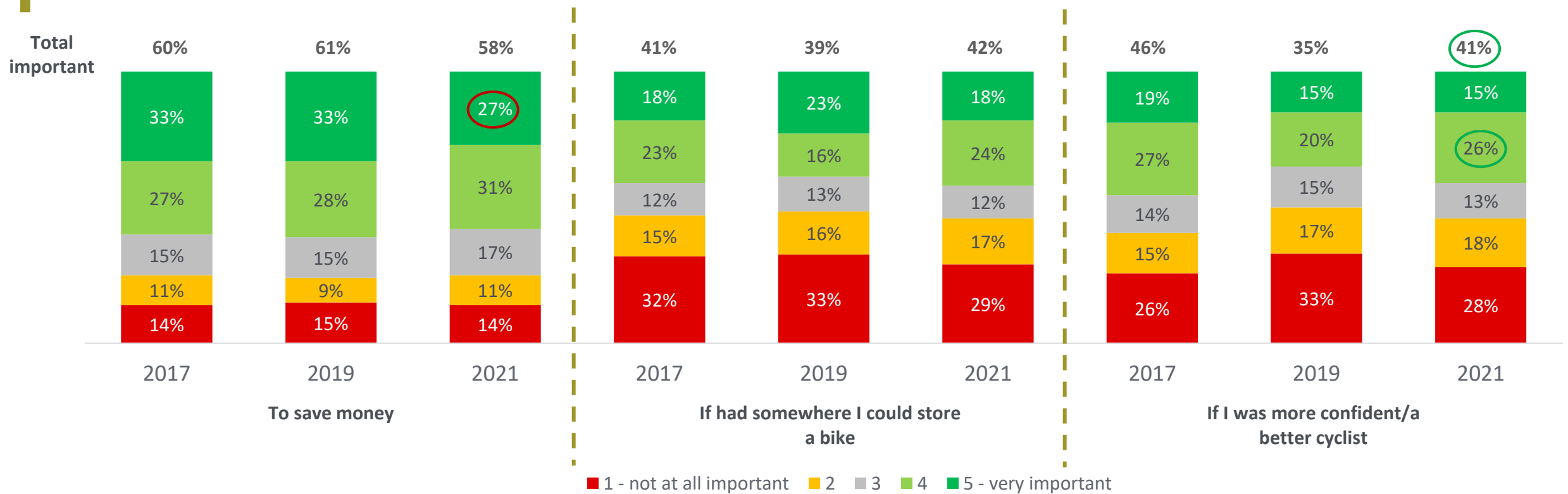


- The importance of the majority of the potentially motivating factors for cycling was consistent across the three waves of the tracker.
- To get fit and improve health has remained the top most motivating factor.

# Attitudes to cycling



The importance of the less prevalent motivations was also generally consistent



- The proportions of respondents rating saving money and bike storage as important motivations to cycle were also broadly consistent across the three waves of the tracker.
- There has been an increase in those rating being a better/more confident cyclist as important in 2021 compared to 2019, but this remains lower than 2017.

Q9: 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.

Base (all who score 3 or more for propensity to cycle – Q10/Q11), 2017: 429, 2019: 497, 2021: 466

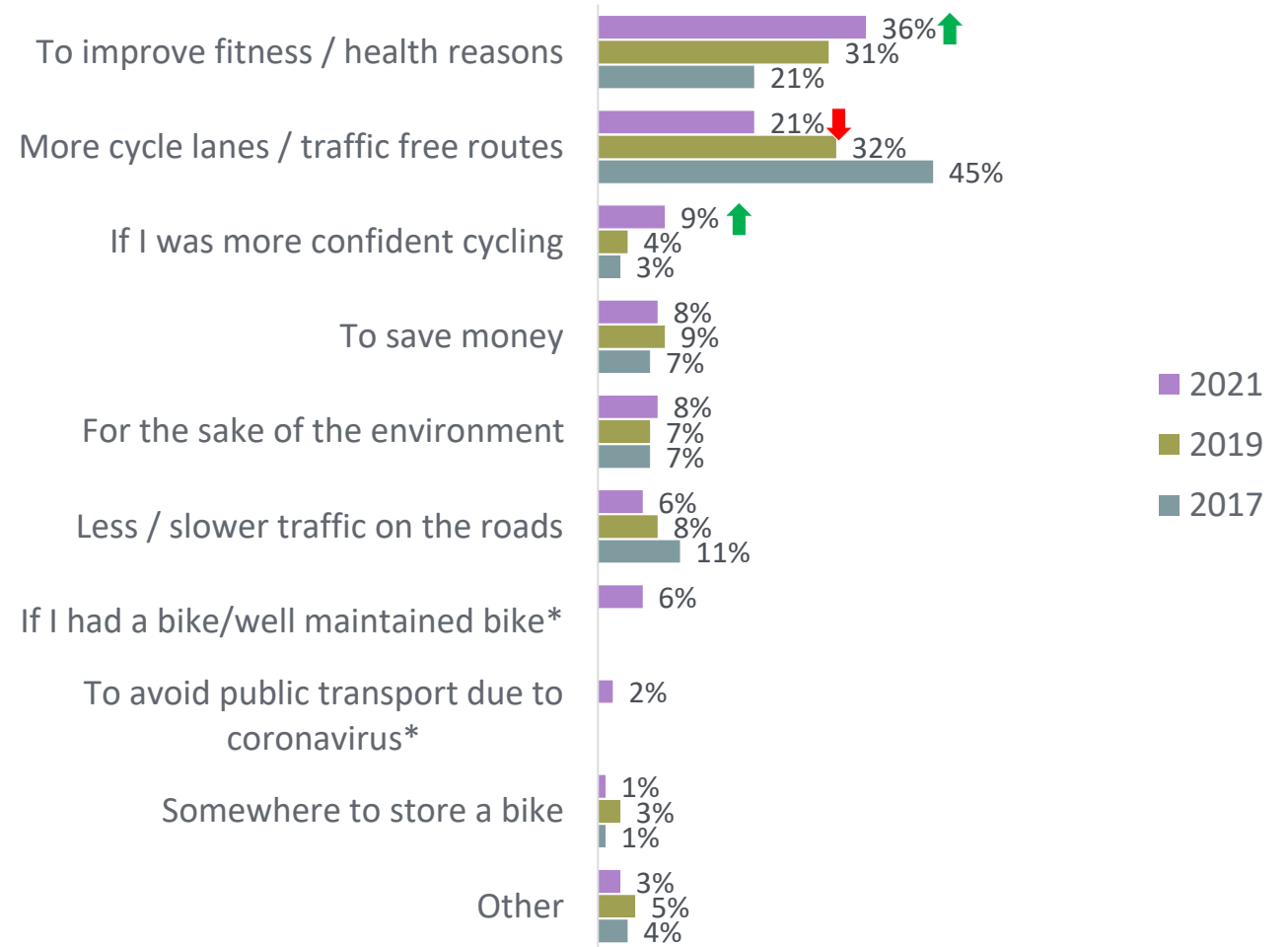
# Attitudes to cycling

## Key motivation to cycle

- When asked to select just one key motivator, improving fitness (36%) and more cycle lanes and traffic free routes (21%) were the most frequently cited.
- However, more people cited improving fitness and fewer mentioned infrastructure in 2021 than in 2017 and 2019 – there is an increasing trend in the importance of fitness and a decreasing trend in the importance of infrastructure.
- The proportions selecting each of the other key motivators has remained consistent between 2019 and 2021, with the exception of an increase in mentions of being a more confident cyclist.

Q10: What would be the one main factor that would encourage you to cycle or cycle more often for everyday journeys?

## Improving fitness and more cycling infrastructure were the top motivating factors



\*New options added in 2021

Base (all who score 3 or more for propensity to cycle – Q10/Q11) 2017: 429, 2019: 497, 2021: 466

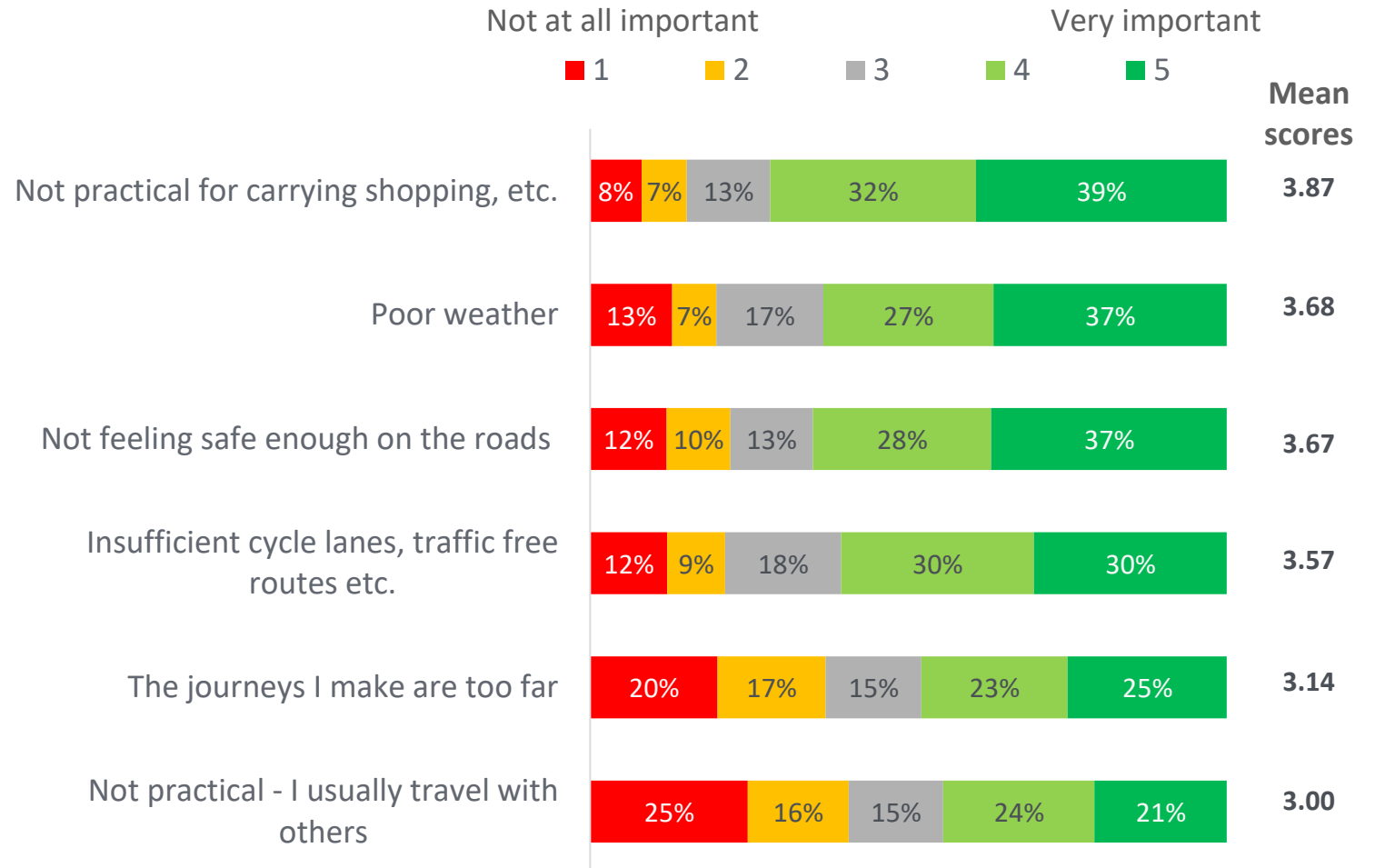
# Attitudes to cycling

## Barriers to cycling

- All respondents were asked to rate the importance of factors in putting them off cycling or preventing them from cycling more for everyday journeys.
- Consistent with the findings in previous waves, a mix of practical and safety concerns were the key barriers.
- The top four barriers to cycling remain unchanged:
  - Not practical for carrying things (72% important)
  - Poor weather (64%)
  - Not feeling safe on roads (65%)
  - Insufficient cycle lanes / traffic free options (61%)
- Significant proportions also rated other practical concerns as important barriers to cycling:
  - Journeys too far (47% important)
  - Not practical because I usually travel with others (45%)



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



Base (all): 1029

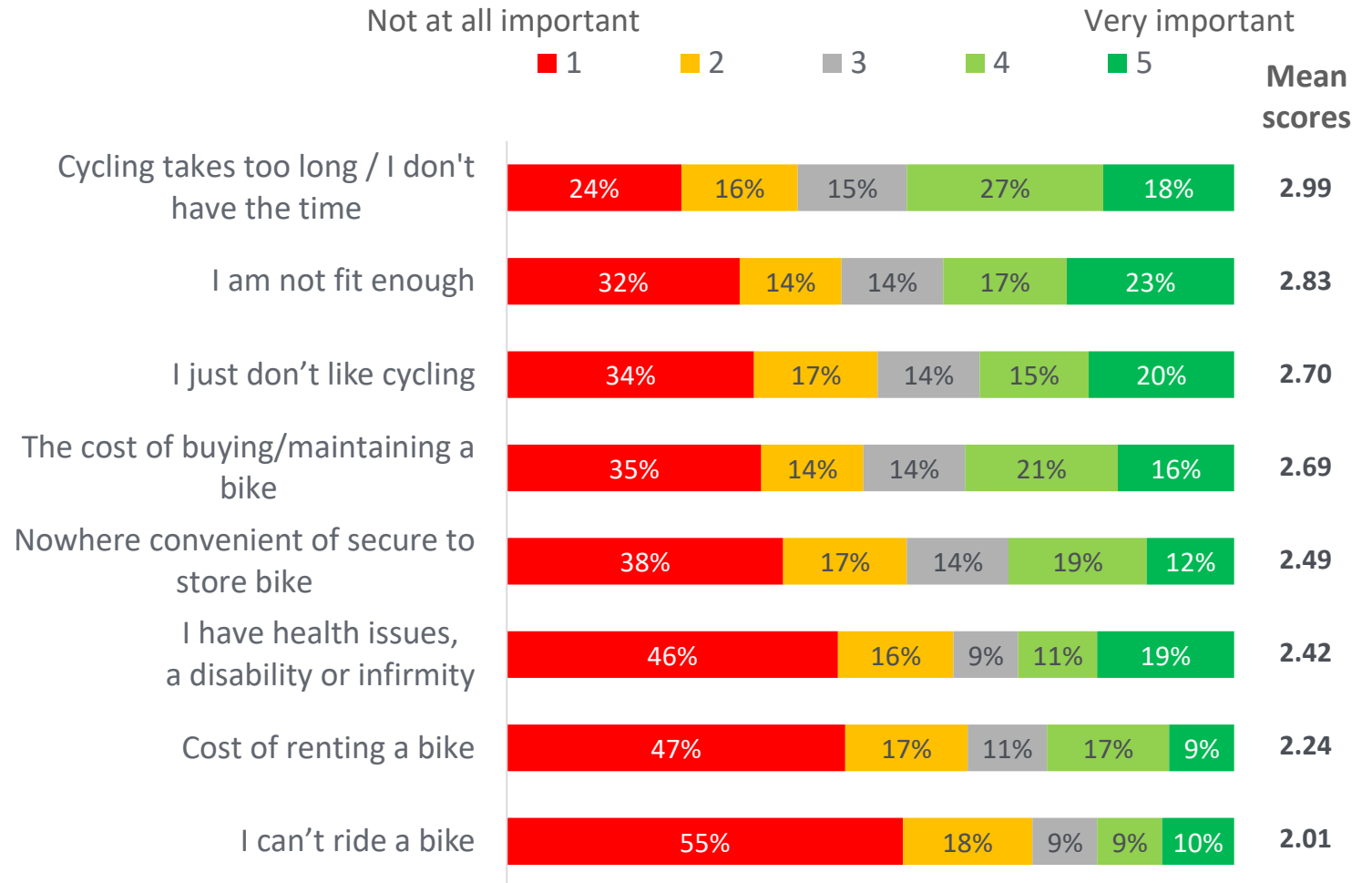
Q11: I am going to read out a list of factors that some people have said puts them off or prevents them from cycling for everyday journeys. For each factor, please tell me how important it is to you in preventing you from cycling more for everyday journeys.

# Attitudes to cycling

## Barriers to cycling

- More personal reasons for not cycling were less likely to be rated as important than the practical barriers previously noted.
- These included not having the time (45% important), not being fit enough (39% important), health (30% important), inability to ride a bike (18% important) and simply not liking cycling (35% important).
  - However, these are likely to be significant obstacles to the minority of people who experience them

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



Base (all): 1029

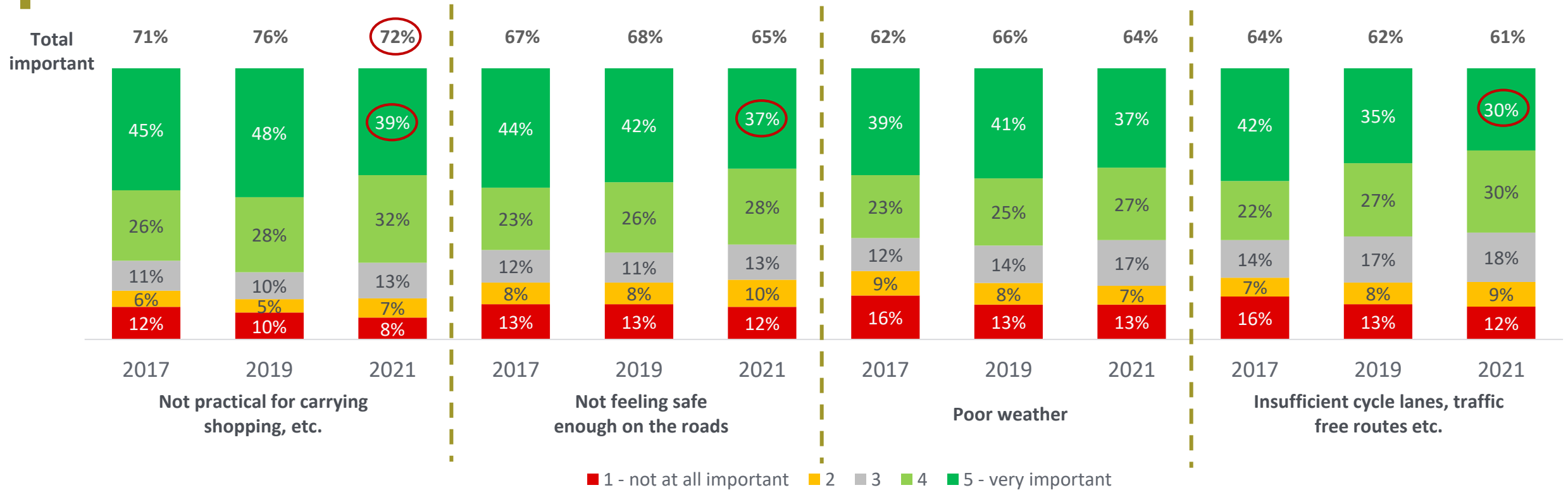
Q11: I am going to read out a list of factors that some people have said puts them off or prevents them from cycling for everyday journeys. For each factor, please tell me how important it is to you in preventing you from cycling more for everyday journeys.



# Attitudes to cycling



Some decreases in rating of very important for barriers between 2019 and 2021

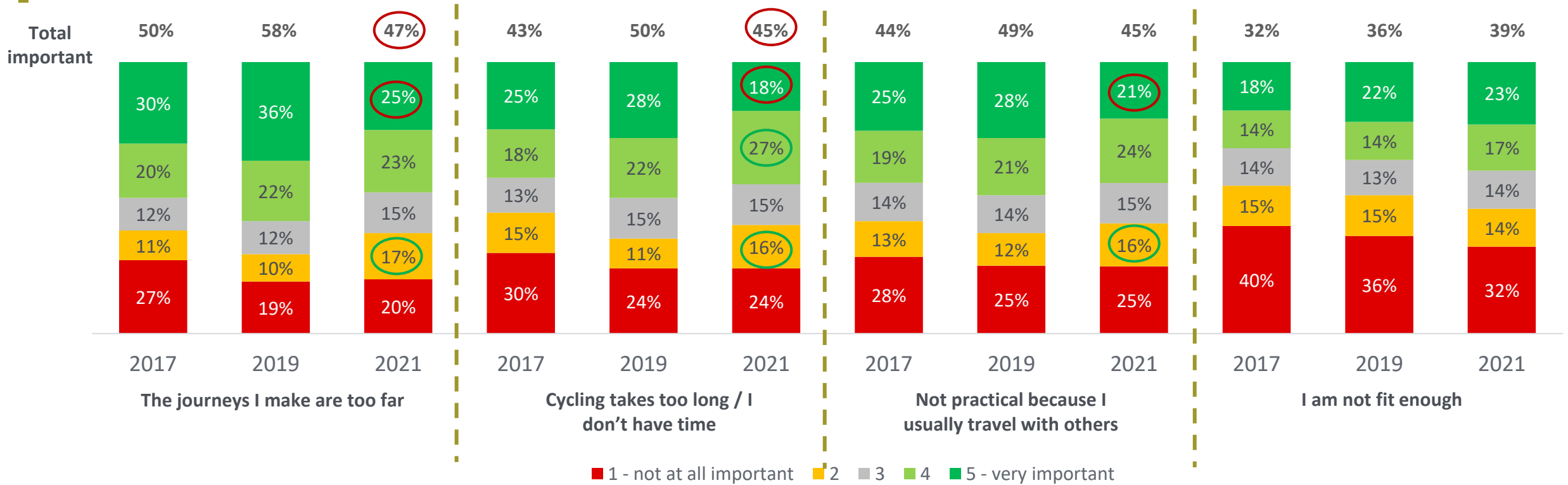


- While the proportions of respondents rating the top barriers as important has remained broadly consistent over the three waves of research, there have been some decreases in ratings of ‘very important’. Specifically, fewer respondents rated ‘not practical for carrying shopping, etc.’, ‘not feeling safe enough on the roads’ and ‘insufficient cycle lanes, traffic free routes, etc.’ as very important barriers to cycling.
- There was also a decrease on the proportion rating ‘not practical for carrying shopping, etc.’ as important overall in 2021 (72%) compared to 2019 (76%), but this figure was similar to 2017 (71%).

# Attitudes to cycling



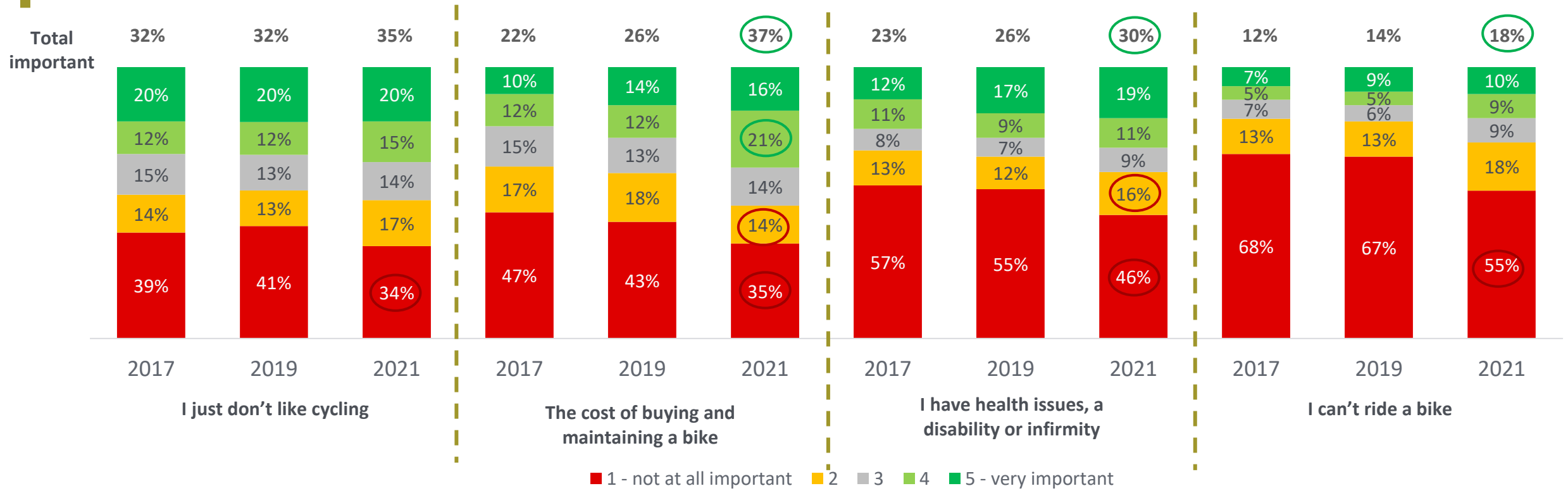
Fewer people considered long journeys or cycling taking too long as barriers this wave



- The importance attached to journeys being too far and taking too long as barriers to cycling reduced in 2021 compared to 2019. For both of these barriers both overall importance and ratings of 'very important' were lower in 2019. However, the proportions rating these two barriers as important overall were similar to 2017.
- There was also a decrease in those rating cycling as being not practical because they usually travel with others as 'very important' from 28% in 2019 to 21% in 2021.
- The proportions of respondents stating that fitness is an important barrier to cycling for them in 2021 (39%) was consistent with 2019 (36%) but higher than 2017 (32%).

# Attitudes to cycling

The importance of some personal barriers have increased this wave – especially the cost of a bike



- There was a notable increase in the proportion of respondents who rated the cost of buying and maintaining a bike as important this wave – 37% rated this as important, compared to 22% in 2017 and 26% in 2019. This may be as a result of the scarcity of bikes to purchase over the coronavirus pandemic pushing up prices.
- Slightly higher proportions of respondents also rated health issues and the fact that they can't ride a bike as important barriers in 2021 compared to the previous waves.
- The proportion saying that they just don't like cycling has remained consistent at around one third of the sample.

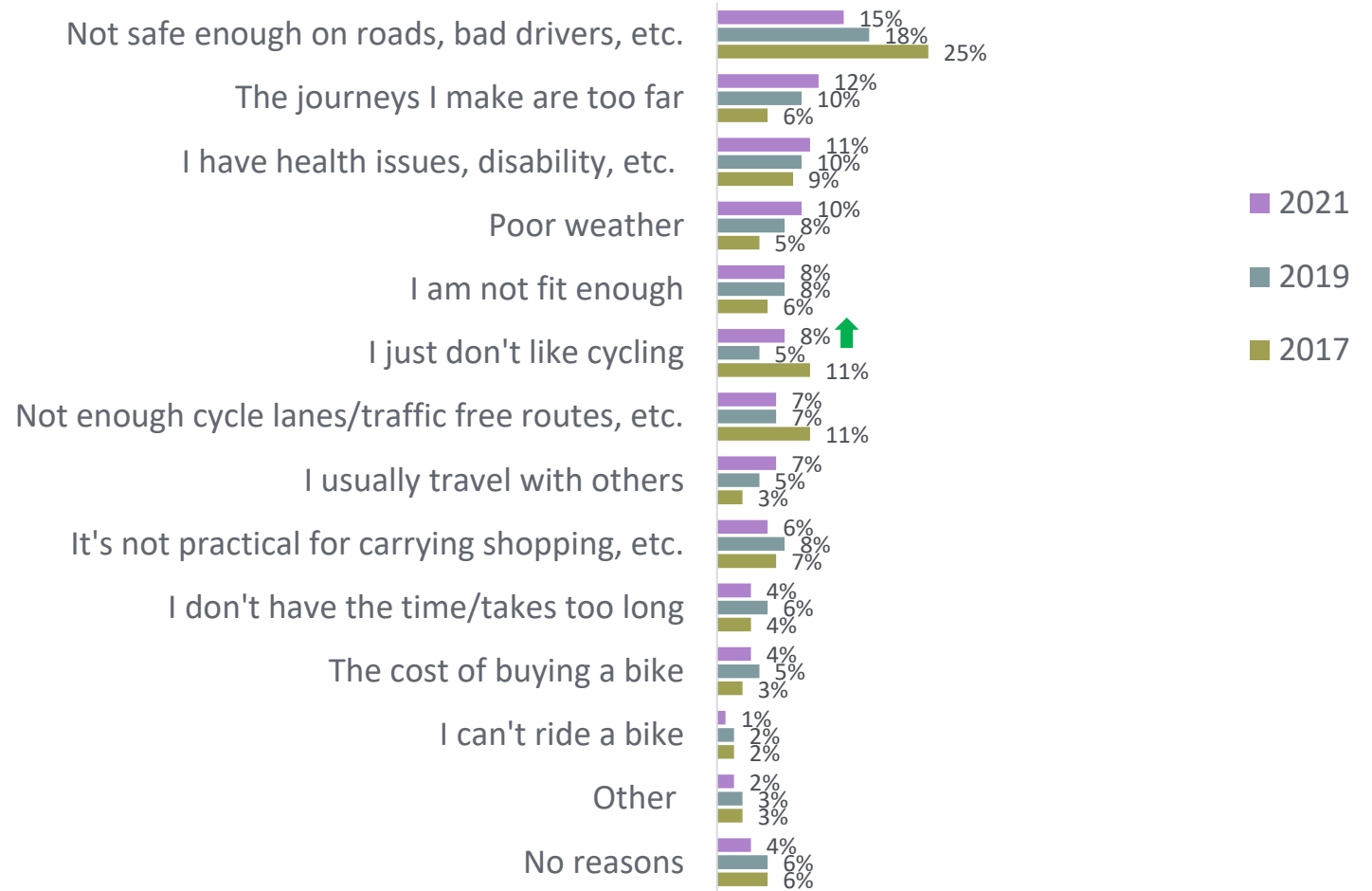
# Attitudes to cycling

## Key barrier to cycling

- Respondents were asked to pick one key barrier that prevents them from cycling or cycling more often for everyday journeys.
- Reflecting the previous two waves of the tracker, no single barrier stood out as a significant issue for a large proportion of the population in 2021.
- The largest response was concern about safety on the roads, mentioned by 15% of respondents. A further 12% said that their journeys are too far, while 11% stated health issues as the main barrier to cycling.
- Other barriers were mentioned by 10% or less of respondents – again suggesting that no single issue inhibits cycling uptake, and that barriers are likely to vary depending on personal circumstances.

Q12: 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, 2021: 1029



# Segmentation analysis

# Segmentation analysis

## Defining characteristics



- Segmentation analysis was conducted in 2017 and 2019 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; Q5 – frequency of cycling for leisure; Q7 – propensity to cycle more in the future generally; Q11 – main reason for not cycling more.
- Ten segments were developed based on these questions. This model has also been applied to the 2021 data.

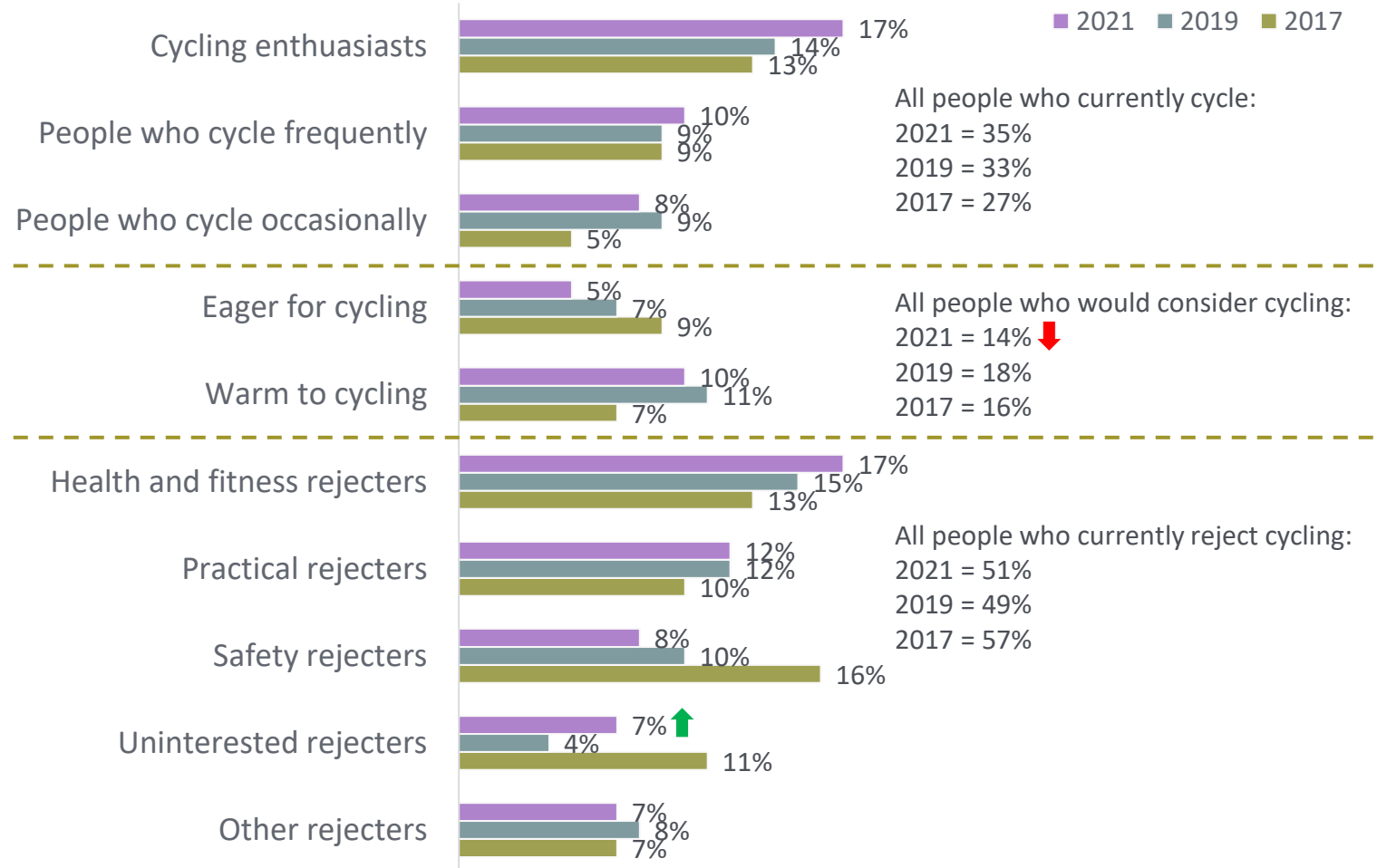
Segment	Defining characteristics
Cycling Enthusiasts	Cycle for transport or leisure <u>at least</u> once a week
People who cycle frequently	Cycle for transport or leisure <u>less than</u> once a week but <u>more than</u> once every 3 months
People who cycle occasionally	Cycle for transport or leisure <u>less than</u> once every three months
<b>Total</b>	<b>All people who cycle</b>
Eager to cycle	Currently never cycle, but <u>high propensity</u> to cycle in next 2 to 3 years
Warm to cycling	Currently never cycle, with <u>moderate propensity</u> to cycle in next 2 to 3 years
<b>Total</b>	<b>All who would consider cycling</b>
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
<b>Total</b>	<b>All who currently reject cycling</b>


\*The new code 'nowhere convenient or secure to store a bike' was added to the practical rejecters segment in 2021

# Segmentation

- Consistent with 2019, 35% of the sample reported that they ever cycle in 2021. This proportion is higher than in 2017, when 27% ever cycled.
- The split in terms of frequency of cycling was also very similar to 2019 – 17% were cycling enthusiasts, 10% were frequent cyclists and 8% were occasional cyclists. There was, however, evidence of an upward trend in the enthusiasts segment over the three waves of the tracker.
- Amongst non-cyclists, there has been a slight decrease in the proportion expressing a propensity to cycle in the future, from 18% in 2019 to 14% in 2021.
- The proportion who currently reject taking up cycling in the next 2 to 3 years was consistent at around half of the sample.
- Over the waves of the tracker there has been a steady increase in the size of the segment of rejectors based on health and fitness reasons – this is now the largest of the rejectors segments.
- The proportions of respondents falling into each of the segments is broadly very similar to 2019, with one small increase Uninterested Rejectors.

The size of most of the segments was consistent with 2019 data





# Impact of life events on transport choices



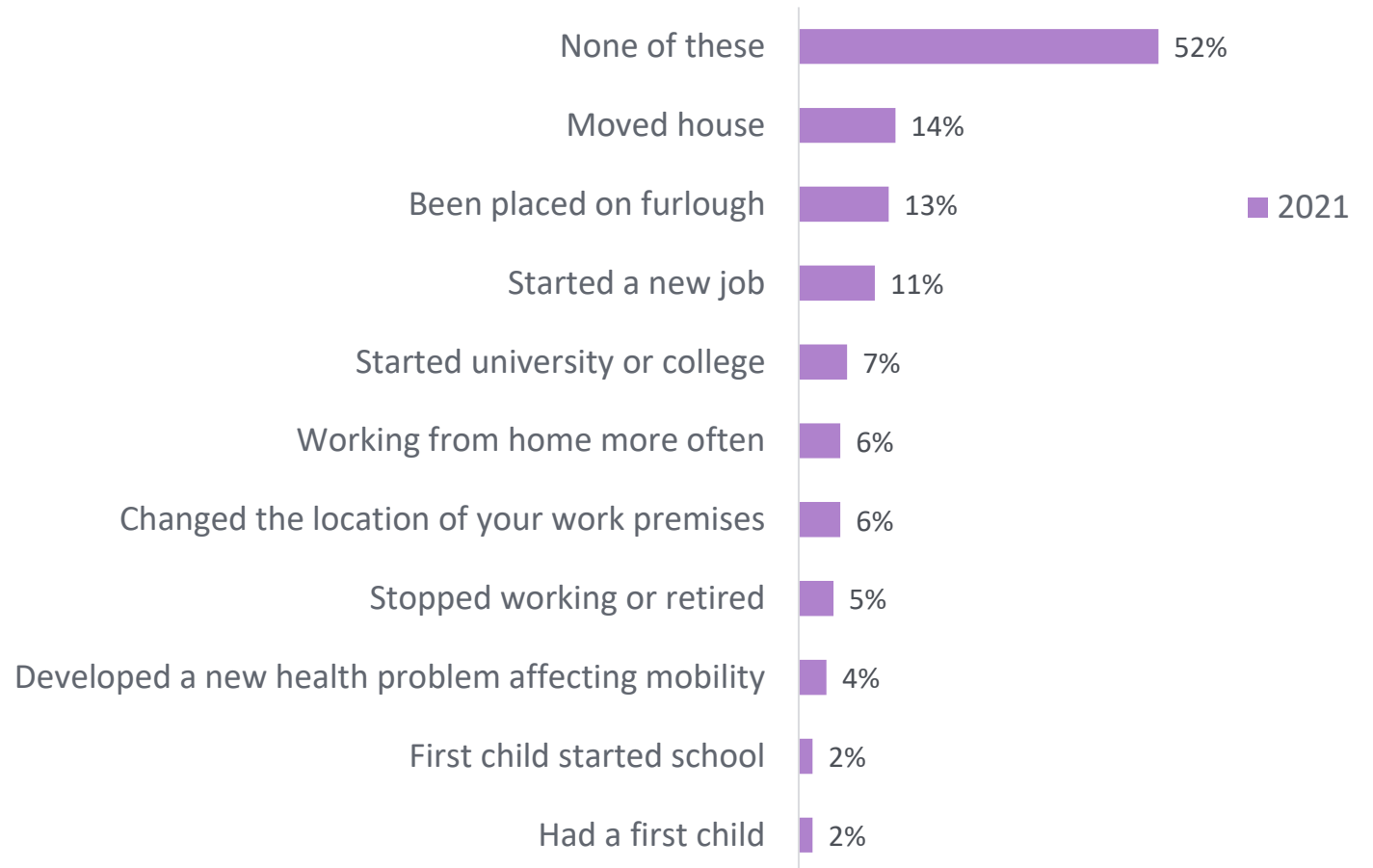
# Life events

## 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 2021 48% of respondents had experienced a significant life event in the last 2 years.
- The most common life changes mentioned were moving house, being placed on furlough or starting a new job.
- Under 35 year olds were more likely to have experienced life events (63%) than 35 to 54 year olds (52%) or those aged 55+ (31%).
- Those in socio-economic groups ABC1 were also more likely to have experienced a change in circumstances (52%) than C2DEs (44%).

Q17: Have you experienced any of the following life events in the last 2 years?

## Almost half of respondents experienced a significant life event in the last 2 years



\*This question changed to 'in the last 2 years' in 2021. Previously the time scale was 1 year, therefore, comparisons to 2017 and 2019 are not shown.

Base (all): 2021:1029

# Life events

## Impact on transport choices

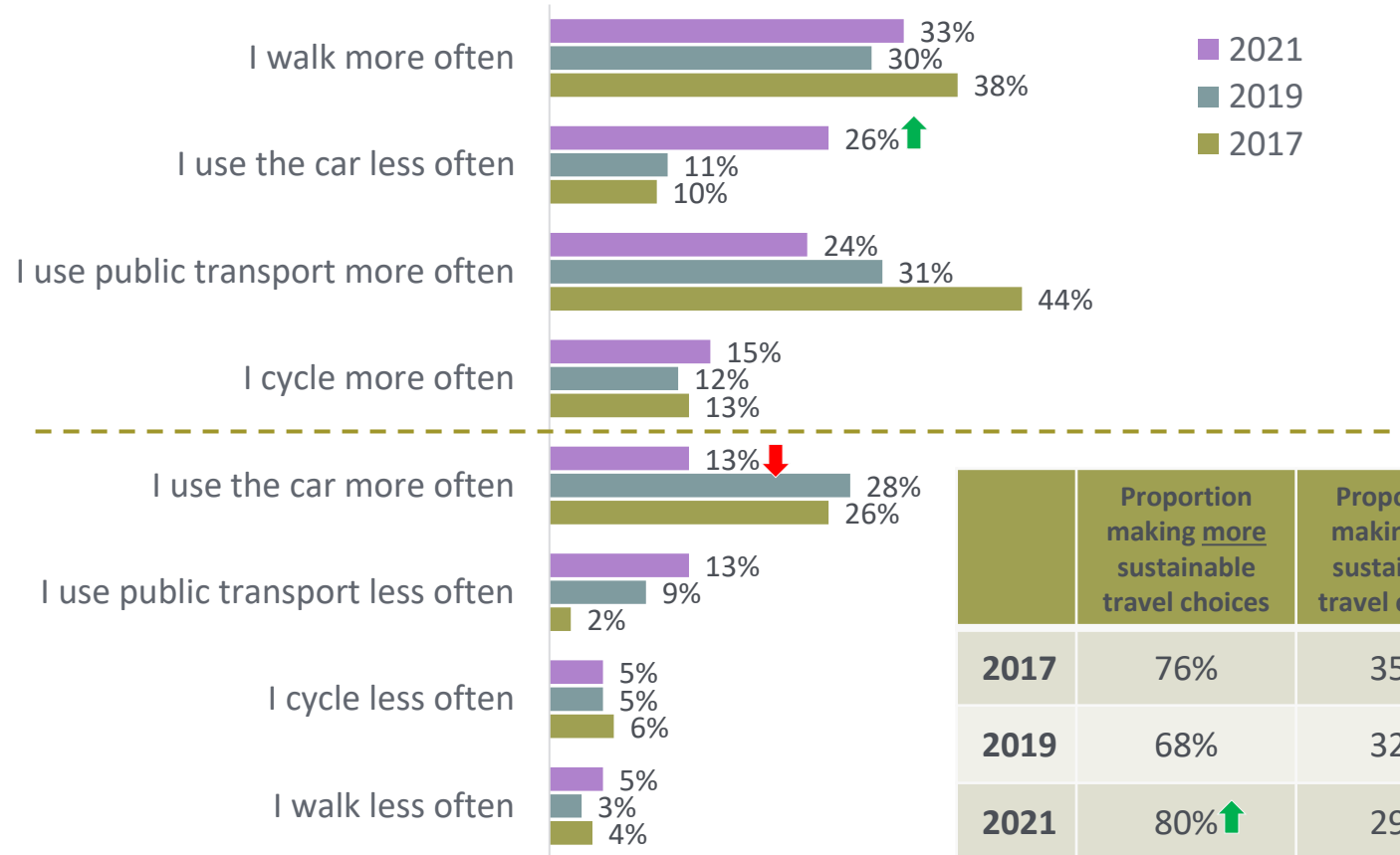
- Over a quarter (27%) of those who experienced a life event in the last year stated that it had an impact on transport choices.
- In total, 80% of those who changed their transport choices made a move towards more sustainable travel options.
  - Mostly walking more and using the car less
  - 15% cycle now more often
- Compared to the previous waves of the tracker, respondents in 2021 were significantly more likely to say they use the car less often as a result of the recent change in their circumstances.

Q18: Did this event cause you to re-think or change the type of transport you use for travel for everyday journeys?  
 Q19: In what way did your transport choices change?




Of those who experienced a life event, more than a quarter changed transport choices

27% of those who experienced a life event stated that impacted on their transport choices (36% in 2017; 31% in 2019)



Base (all who experienced a life event and changed transport choices) 2017: 108, 2019: 94, 2021:133



# Influence of people and events on propensity to cycle

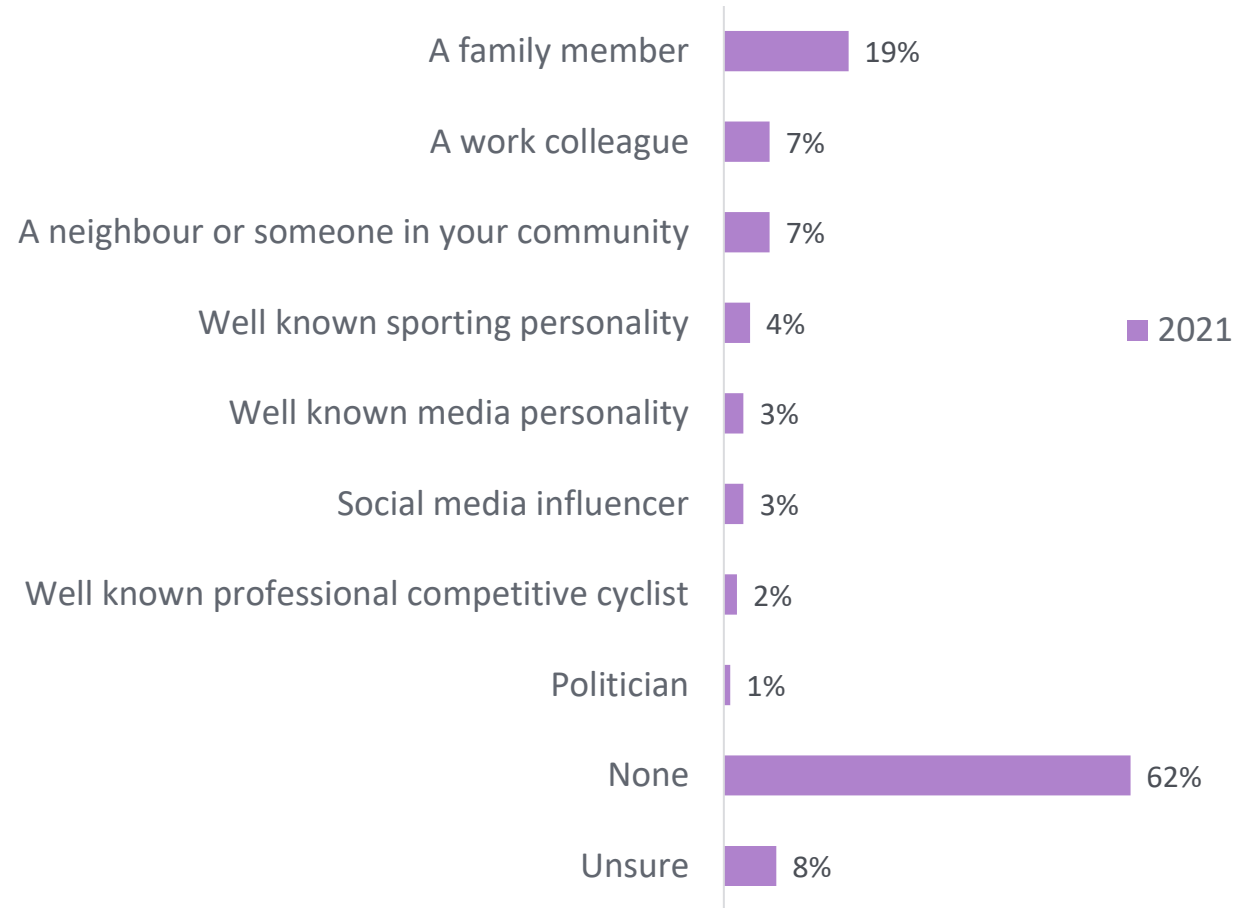
# Influence of people and events

## Influence of people

- 30% of respondents stated that they might be encouraged to cycle more often by the endorsement of a celebrity, friend, relative or colleague.
- People were more likely to be influenced by people known to them than well known sporting or media personalities.
- Family members were considered the most influential – 19% reported that they might be encouraged to cycle by a family member – followed by work colleagues (7%) and neighbours/someone in the community (7%).
- The younger the respondent the more likely they were to say they could be influenced – 46% of under 35s, compared to 33% of 35-54s and 13% of over 55s.
- Higher SEG groups were also more likely to be influenced – ABC1 (37%), C2DE (24%)

Q20: 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?

## Three in ten said might be influenced by others to take up cycling or to cycle more often



\*The response codes for this question changed in 2021, therefore, comparisons to 2017 and 2019 are not shown.

Base (all - 2021): 1029

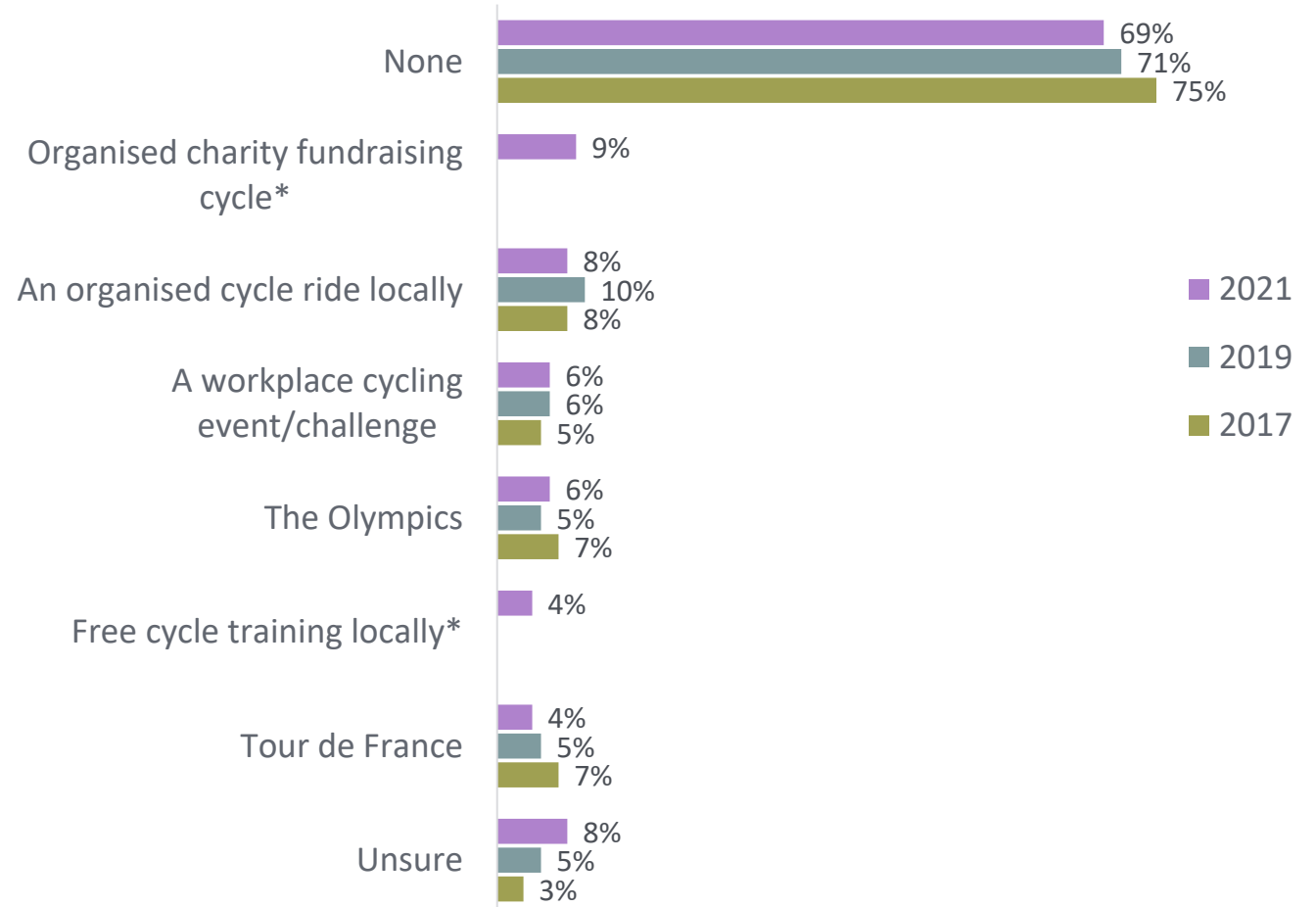
# Influence of people and events

## Influence of events

- Just under a quarter of respondents (23%) stated they could be influenced by an event to take up cycling or cycle more often. This is consistent with 2017 (22%) and 2019 (24%).
- No single event or type of event stood out, however, one in ten said an organised charity cycle (9%) or an organised cycle ride locally (8%) might influence them.
- The Olympics and The Tour de France were less likely to encourage cycling – only being mentioned by 6% and 4% respectively.
- Again, the younger the respondent the more likely they were to say they could be influenced – 41% of under 25s, compared to 26% of 25-34s, 25% of 35-54s and 12% of over 55s.
- Higher SEG groups were also more likely to be influenced – ABC1 (28%), C2DE (17%).

Q21: 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 often



\*New options added in 2021

Base (all) 2017: 1060, 2019: 1049, 2021:1029



# Summary and conclusions

# Summary and conclusions

## **The overall proportion of people who cycle was consistent between 2019 and 2021, but higher than 2017**

- Over one third of the sample reported that they ever cycle in 2021.
- The profile of people who cycle continues to be skewed to males, younger age groups and higher socio-economic groups.

## **However, propensity to cycle has decreased slightly this wave**

- Half of respondents (51%) selected the lowest score of 1 out of 10 for propensity to cycle generally in 2021, compared to 46% in 2019.
- The proportion scoring 1 out of 10 for cycling for every journeys was similar to previous waves.

## **Attitudes towards the societal impact of cycling continue to be very positive, and have improved this wave**

- The majority agree that cycling improves health and wellbeing, and that it is good for Scotland and for the environment.
- The proportion agreeing that cycling is good for Scotland and for the environment was higher in 2021 than in the previous two waves.

## **But many continue to see it as impractical and unsafe**

- Most again agreed that their local roads are too busy to be safe for cycling and just less than half agreed cycling is not practical for them.

# Summary and conclusions

## **Personal association with cycling has not changed since 2019**

- The proportions agreeing that few people they know cycle regularly and they are not the kind of person who cycles remained consistent with 2019, however, fewer disagreed strongly that they would consider cycling for some journeys.

## **The key motivations to cycle are largely consistent with 2017 and 2019 waves**

- The key motivating factors remain improving fitness, the provision of more cycling infrastructure, and for the sake of the environment.

## **The main barriers to cycling in 2021 were also very similar to 2017 and 2019**

- Not practical, not feeling safe, the weather and insufficient cycling infrastructure were again 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 and socio-economic groups.

## **Environmental concerns continue to increase in importance to people as a motivation/positive aspect of cycling**

- 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.



# Summary and conclusions

**The coronavirus pandemic has had an impact on usage of public transport, but there is less evidence of an impact on levels of cycling**

- Significantly fewer people reported that they frequently use buses and trains, however, the frequency of cycling as a mode of transport increased.
- Two fifths of those with some propensity to cycle in the future rated avoiding public transport because of coronavirus as an important motivation.
- However, overall levels of cycling were consistent with 2019 and propensity to cycle generally decreased slightly this wave.

# Thank you



## Contact


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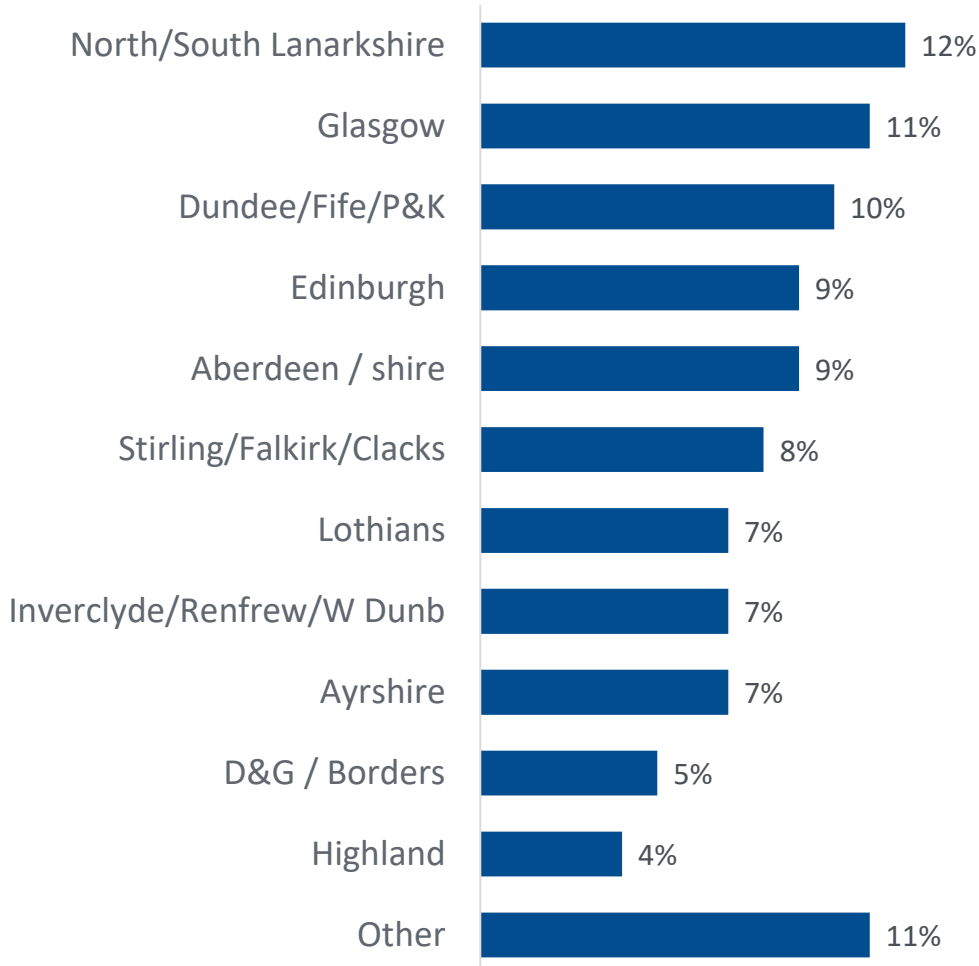
# Appendix I

- Scotland population statistics

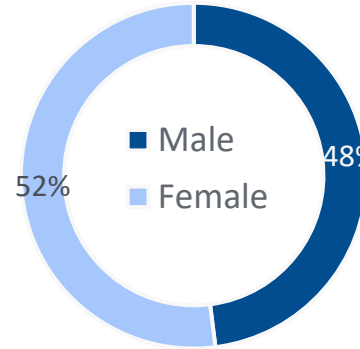
The sampling plan for each wave of research was based on Scotland statistics for region, gender, age and socio-economic groups - the Scotland profile is shown below



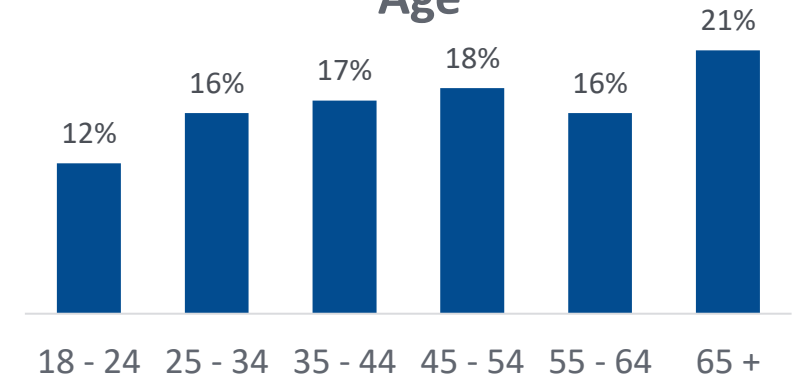
**Region**



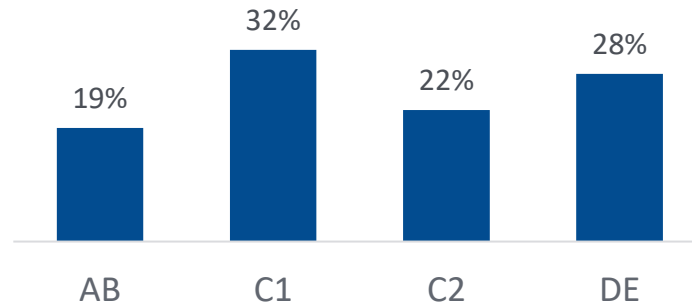
**Gender**



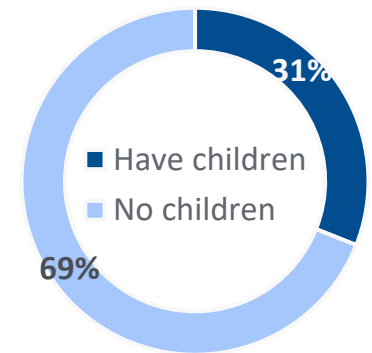
**Age**



**Socio-economic Group**



**Dependant children in household**



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# 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, 1049 in 2019 and 1029 in 2021.
- Fieldwork dates:
  - 2017 - 28<sup>th</sup> August to 19<sup>th</sup> September 2017
  - 2019 - 26<sup>th</sup> August to 22<sup>nd</sup> September 2019
  - 2021 – 25<sup>th</sup> August to 24<sup>th</sup> September 2021
- 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 in 2017 and 2019, and 16 in 2021.
- Each interviewer’s work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by email and telephone) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. All interviewers working on the study were subject to validation of their work.
- No weighting has been applied to the data.
- Quota controls were used to guide sample selection for this study. This means that we cannot provide statistically precise margins of error or significance testing as the sampling type is non-probability. The margins of error outlined below should therefore be treated as indicative, based on an equivalent probability sample.
  - The overall sample size of 1,029 provides a dataset with an approximate margin of error of between  $\pm 0.61\%$  and  $\pm 3.05\%$ , calculated at the 95% confidence level (market research industry standard).

# 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 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.
  - 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