

progressive

Cycling Scotland
Attitudes and Behaviours Towards
Cycling in Scotland – Wave 4
November 2022



Contents



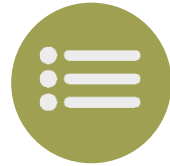
Project background



Transport choices



Impact of people on likelihood of cycling



Project objectives



Cycling Behaviours



Attitudes towards the Environment



Method



Attitudes to cycling



Summary and conclusions



Bike ownership



Segmentation analysis

Project background



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

While 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.



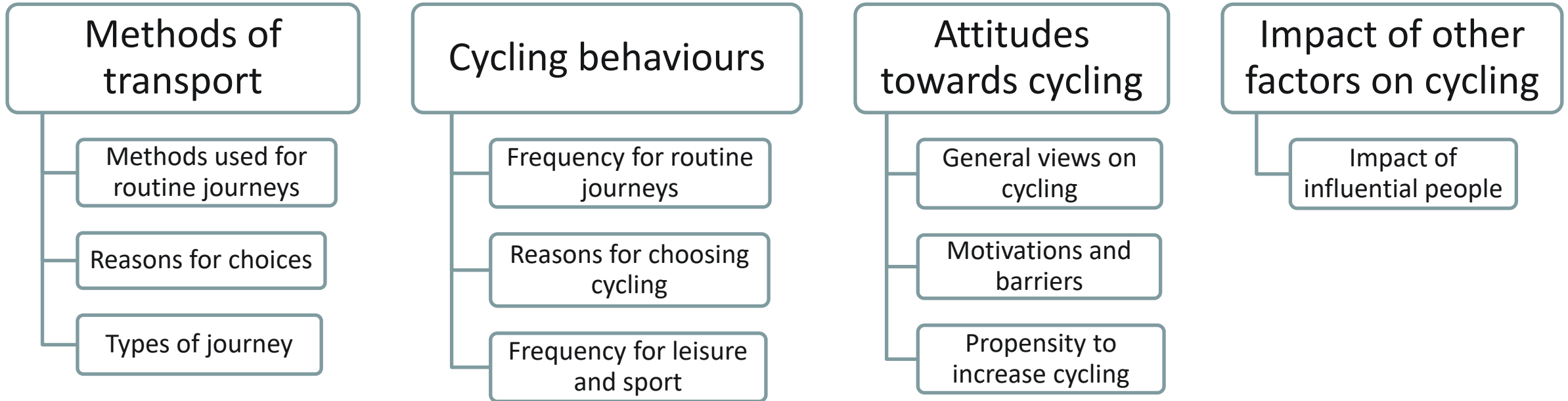
Cycling Scotland commissioned a long-term research study to:

- 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 conducted the first three waves of research in 2017, 2019 and 2021. Due to the need for regular data on cycling attitudes, the project is now running every year, with this report focusing on findings from the 4th wave of the survey, completed in September 2022.

It is particularly important to measure and track attitudes and behaviours towards cycling, to see how things have changed after restrictions lifted following the COVID-19 pandemic in 2020/21.

Project objectives



Method



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

Wave 4

The method replicated waves 1-3 – face-to-face in street interviews

Sample size: 1037 interviews were conducted

Each interview was approximately 12 minutes long

The sample was gathered from across Scotland. Most Scottish local authorities were included.

Quotas were set on demographics (age, gender, socio-economic group) to ensure a sample representative of the Scottish population.

Fieldwork was conducted between 19th September and 13th October 2022.



The margin of error on a sample of 1037 is between +/- 0.61% and +/- 3.04% at the 95% confidence interval.*


Please note: throughout this report men include trans men and women include trans women.

* 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

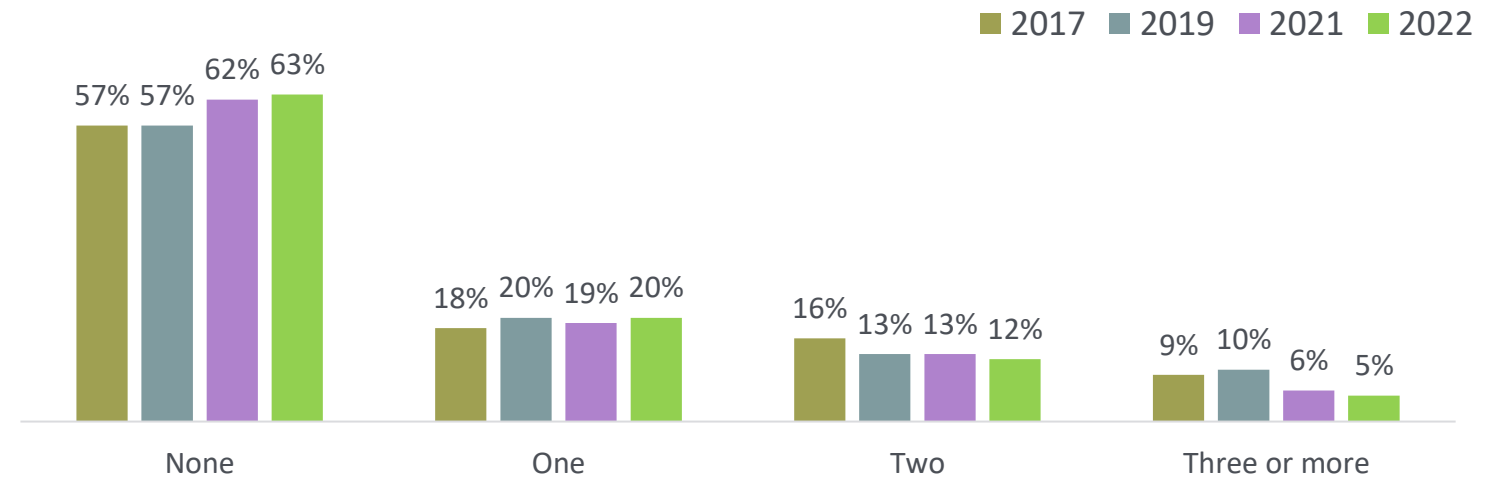
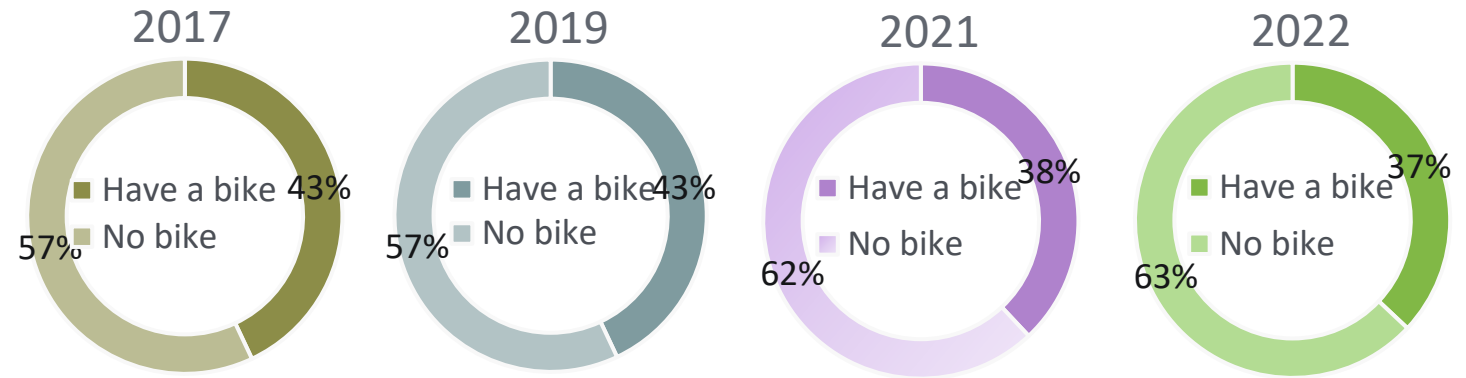


Bike ownership

Bicycle ownership

- Over one in three (37%) respondents in 2022 reported having access to an adult bike (exc. electric bikes) in their household.
- This is consistent with findings in 2021 (38%), but lower than the proportion with access to a bike in the household in 2017 and 2019 (both 43%).

Adults bikes (exc. electric) in household



Q19. How many adult bicycles do you own (excluding electric bikes), or are available for use in your household?

Base (all) 2017: 1060, 2019: 1049, 2021: 1029, 2022: 1037

Sample profile

E-bikes and e-scooters

- The vast majority (96%) do not own an electric bike.
- Over a quarter (28%) of people would consider buying/riding an e-scooter if they became legal to ride on the roads (11% definitely; 16% possibly).
- Men (34% vs. 21% of women) and 18-34 year olds (47% vs. 11% of 55+ year olds) were the groups most likely to consider buying/riding an e-scooter if they became legal to ride on roads in the future.

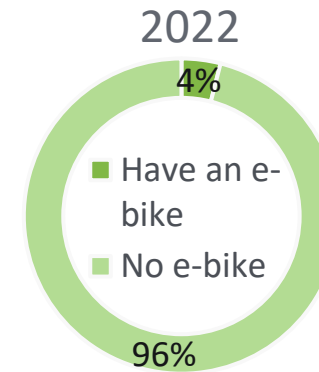
Q20. How many electric bikes do you own, or are available for use in your household?

Q22. If e-scooters become legal to ride on roads in the future, would you consider buying/riding one?

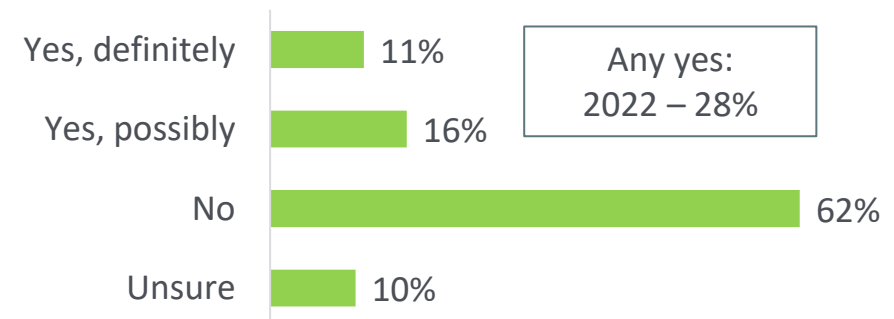
E-bikes and e-scooters



Electric bikes available for use in household



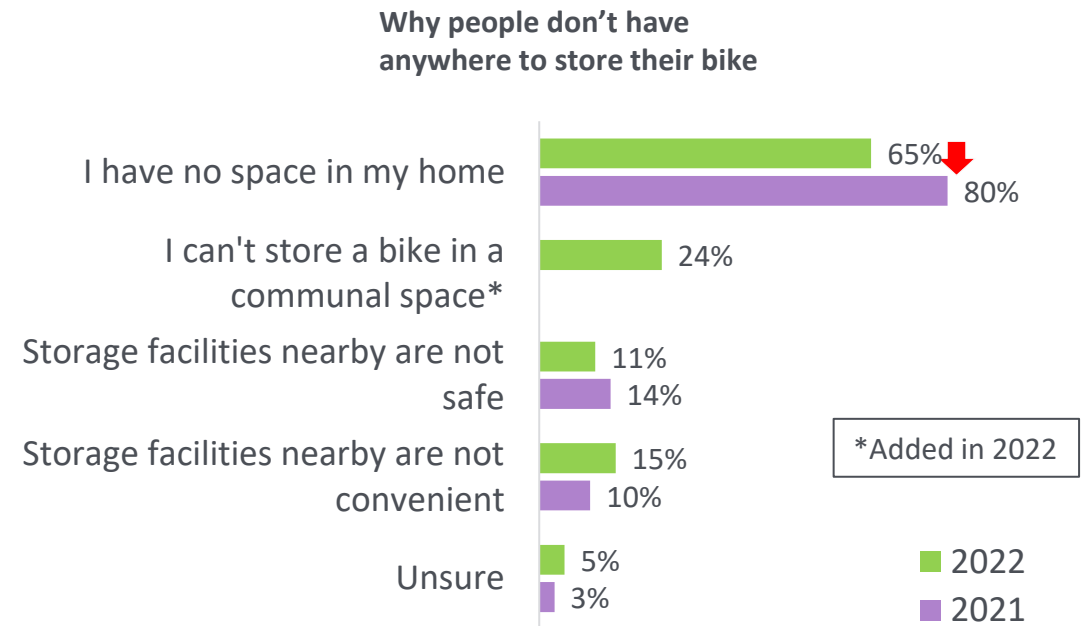
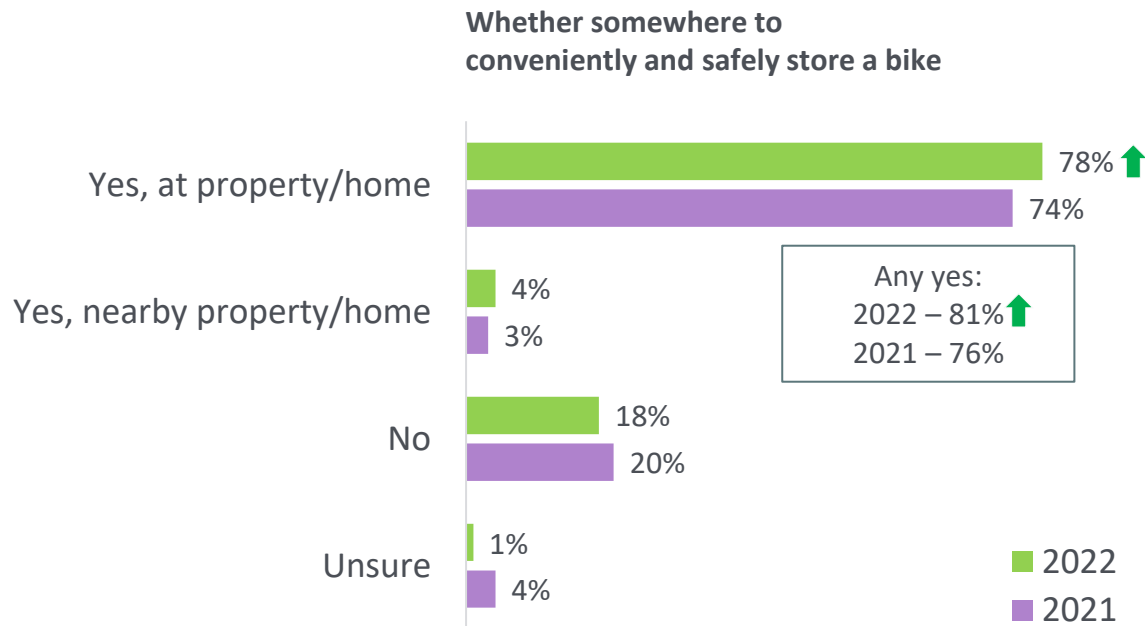
Whether would consider buying/riding e-scooter if they became legal



Bike ownership: storing a bike



More people had somewhere at or nearby their property to conveniently store their bike in 2022




- Since 2021, people have been asked whether they have anywhere convenient to store a bike, as this is a key barrier for some. Most people have somewhere to store a bike, and this has risen in 2022 (81%, compared with 76% in 2021). This was most likely to be at home (78%) but a minority (4%) have somewhere nearby their home.
- A lack of space in the home was the main reason people don't have anywhere to store a bike (65%), although this was less of a problem than in 2021, when 80% had this issue.

Q23: Do you have somewhere to conveniently and safely store a bike where you live?

Q24: Which of the following reasons mean that you don't have anywhere convenient or safe to store a bike where you live?

Base (all) 2021: 1029, 2022: 1037
Base (if nowhere to store) 2021: 210, 2022: 182



Transport choices

Transport choices

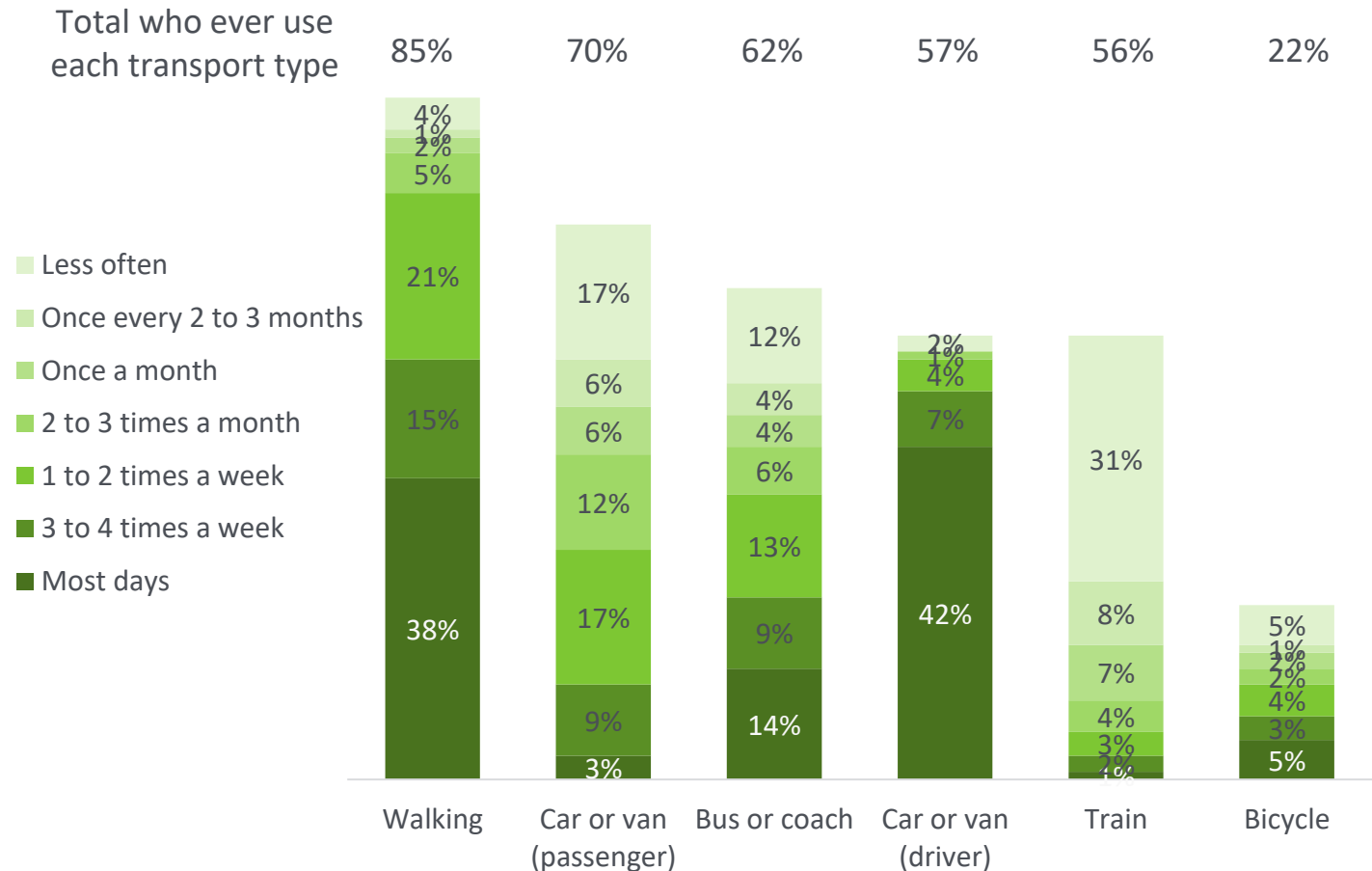
Frequency

- As in previous waves, driving and walking were, by some margin, the modes of transport used most regularly by people in Scotland – both were used most days by around two in five people (42% and 38%, respectively).
- A minority (15%) reported they never walk – larger proportions (upwards of 30%) never use the other modes of transport.*
- Just over one fifth (22%) reported that they use a bike for journeys at least sometimes, with over one in 10 (12%) cycling for some journeys at least once a week.
- As in previous waves, the following groups were more likely to cycle for journeys most days:
 - men (9% vs. 2% of women).
 - 18-34 year olds (11% vs. 4% of 35-54 year olds and 2% of 55+ year olds).

*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 of transport for journeys



Base(all - 2022): 1037

Transport choices

Frequency

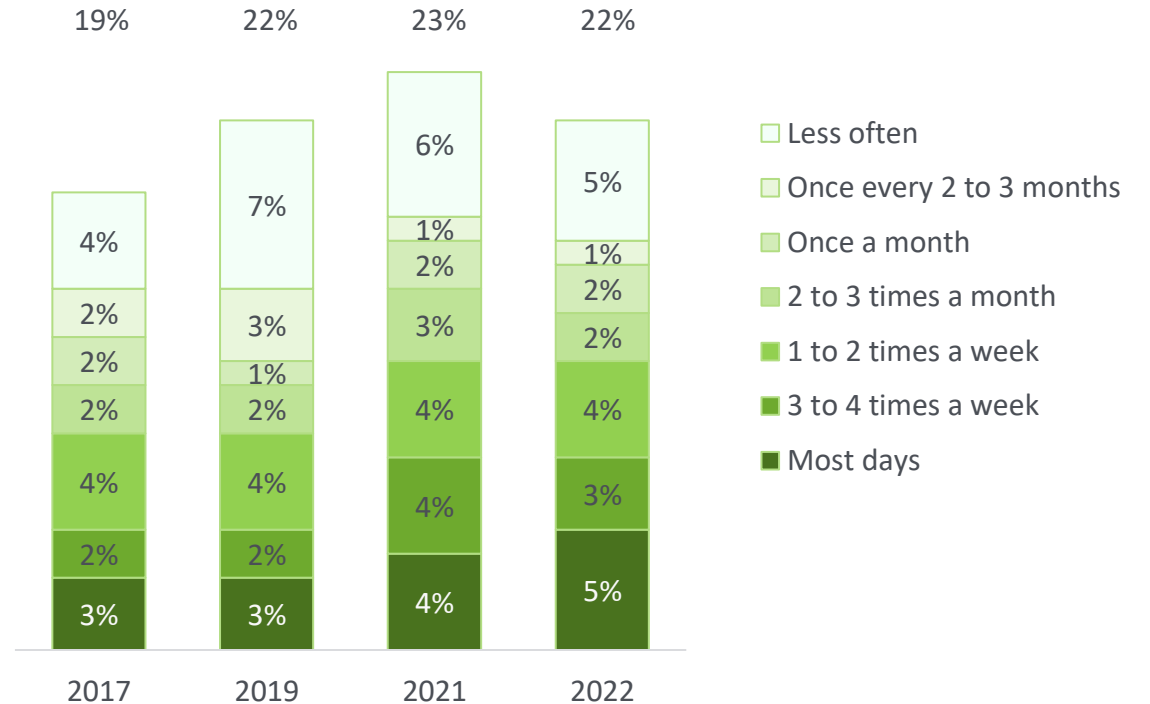
- The proportion of people cycling for journeys has been consistent since 2019 at just over one in five people.
- The data for frequency of cycling was very consistent between 2021 and 2022, with 12% cycling at least once a week.

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 journeys



Total who cycle for journeys

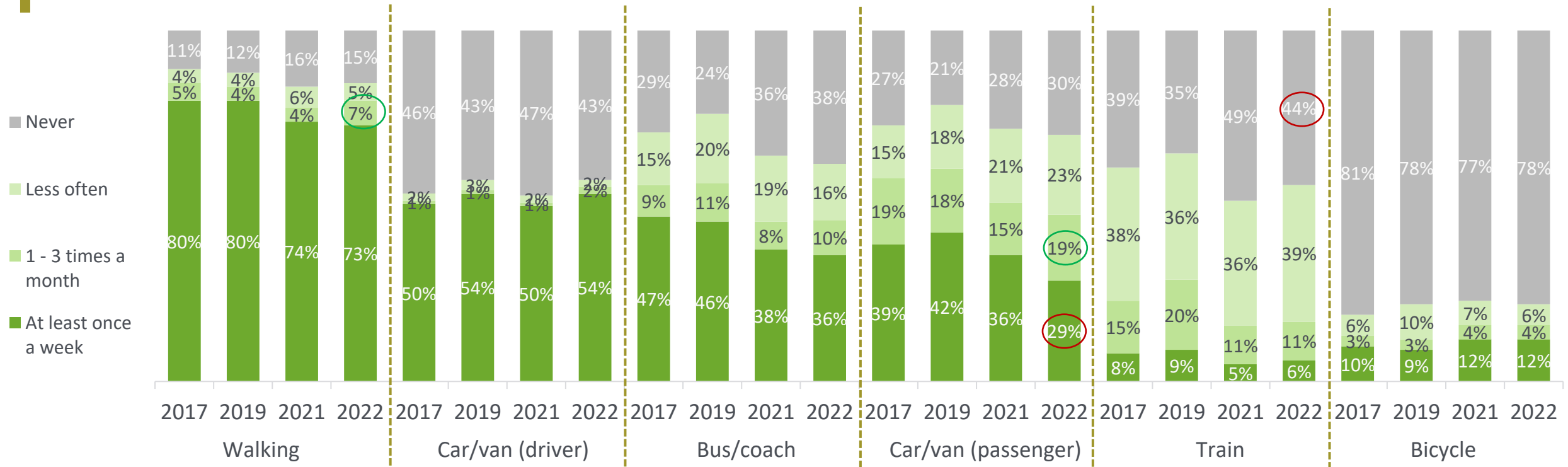


Base(all): 2017: 1060; 2019: 1049; 2021: 1029; 2022: 1037

Transport choices



People were more likely to use the train on at least some occasions in 2022



- Following some key changes between 2019 and 2021, most likely as a result of the pandemic, there were fewer changes in the use of different modes of transport between 2021 and 2022. This may indicate a stabilising of transport habits following the COVID-19 pandemic.
- The main differences related to the use of a car/van as a passenger and the train. Fewer people used a car/van as a passenger for journeys at least once a week in 2022 (29%, dropping from 36% in 2021); and people were more likely to use the train for journeys on at least some occasions in 2022 (56%, up from 51% in 2022).

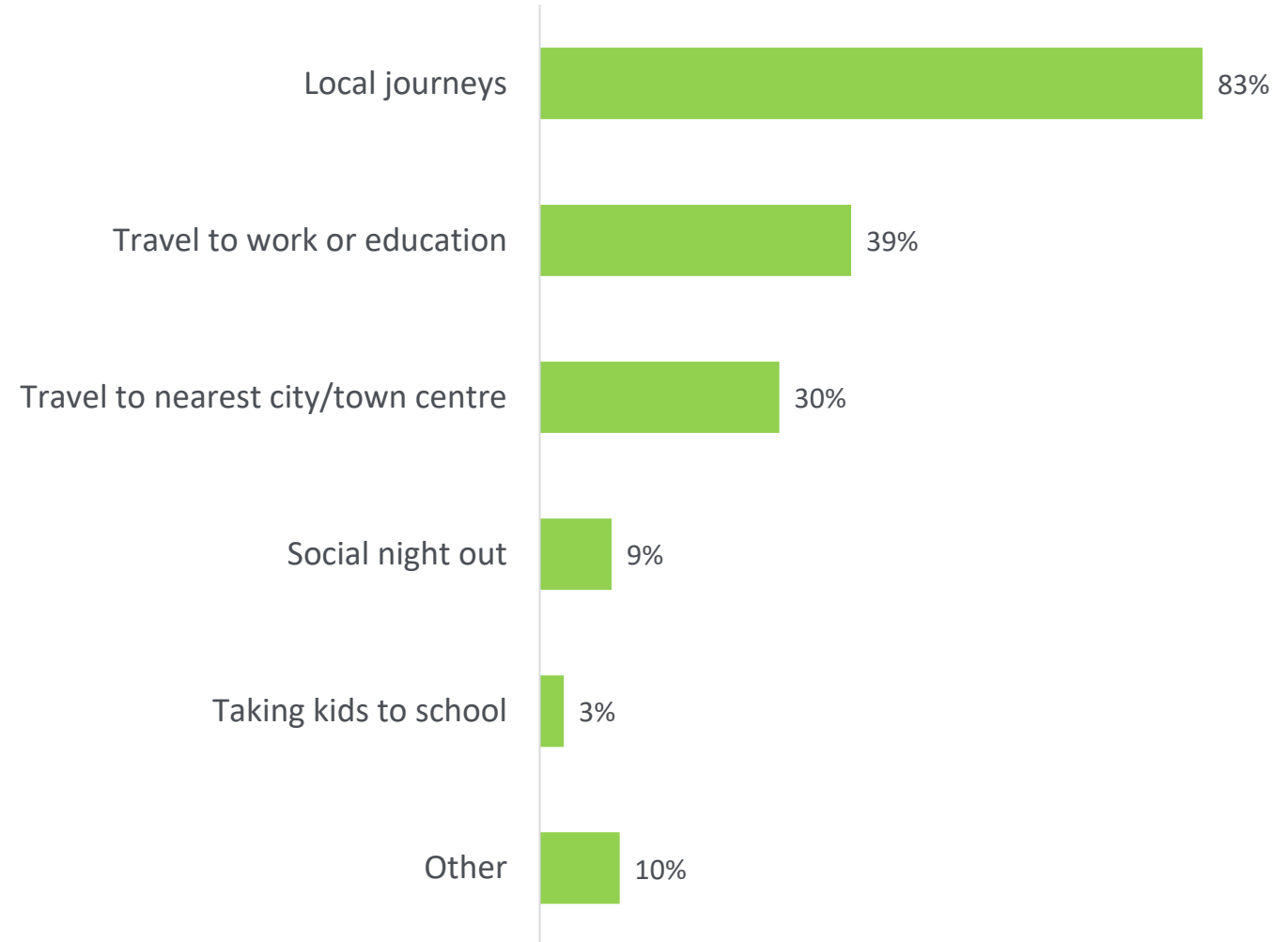
Transport choices

Journey types

- Around one in six (16%) reported they travel by bike at least once a month (compared with 17% in 2021, 13% in 2017 and 12% in 2019).
- There was consistency across the four waves of research in terms of the types of journey taken with a bike – local journeys (83%) dominated once again in 2022.
- Commuting work/education (39%) and travelling to the nearest town or city (30%) were the other key journey types taken by cyclists.

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) 2022: 161

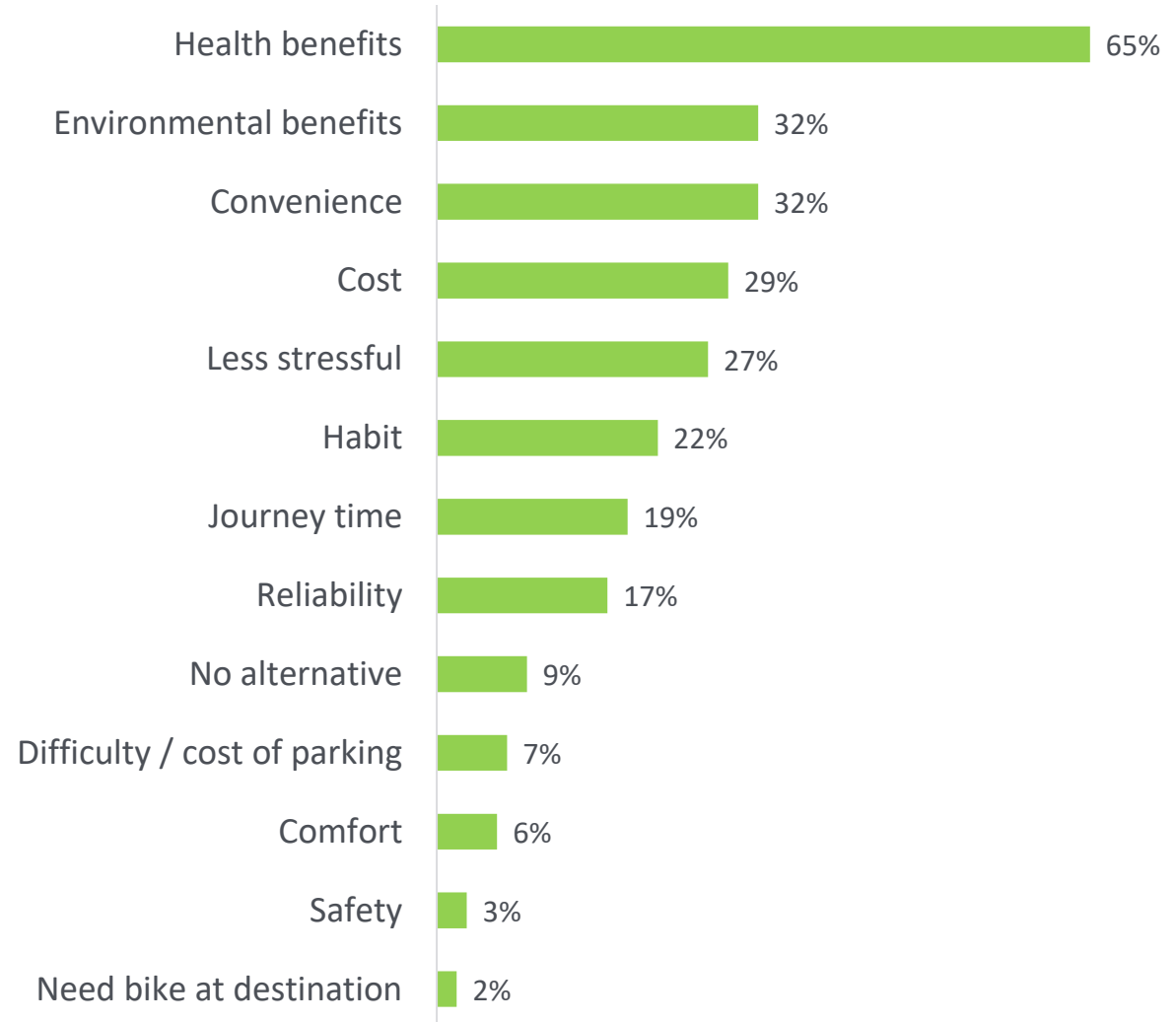
Transport choices

Reasons

- As we have seen in successive waves of the tracking study, the main motivation for using a bike is to improve health. The proportion reporting this was, however, lower in 2022 (65%) compared with 2021 (76%).
- In 2022, around a third (32%) of cyclists cited environmental benefits and convenience as reasons for using a bike. Although not significantly higher than 2021 (28%), this does indicate a continuation of upward trend in the importance of environmental benefits over time.
- Cycling being cost-effective (29%) and less stressful (27%) were reported by over a quarter of cyclists, making these other common reasons.
- Cost was a more common reason for cycling in 2022 (29%) compared with 2021 (17%).

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) 2022: 161



Cycling behaviours

Cycling behaviours

Frequency

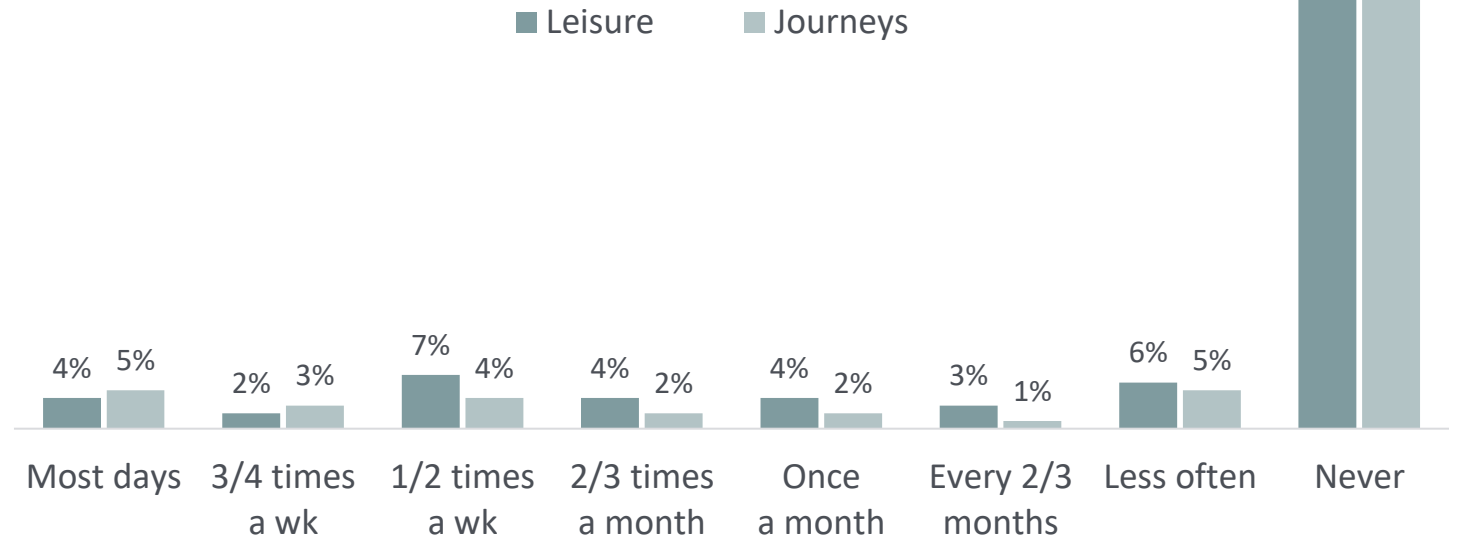
- Overall in 2022, 30% of people cycled for leisure and 22% cycled for journeys at least occasionally – this is similar to findings in 2021.
- Combined, a third (32%) of the population cycle either for transport or leisure – this figure is similar to the previous two waves but higher than in 2017 (when 27% cycled at all).
- People who ever cycle are most likely to be:
 - Male (40%, compared with 24% women)
 - Under 35 years old (44%, compared with 15% 55+)
 - ABC1 (40%, compared with 23% C2DEs)

In 2022, one third of people cycle – similar to the previous two waves



Total proportion who ever cycle:

2017	– 27%
2019	– 33%
2021	– 35%
2022	– 32%

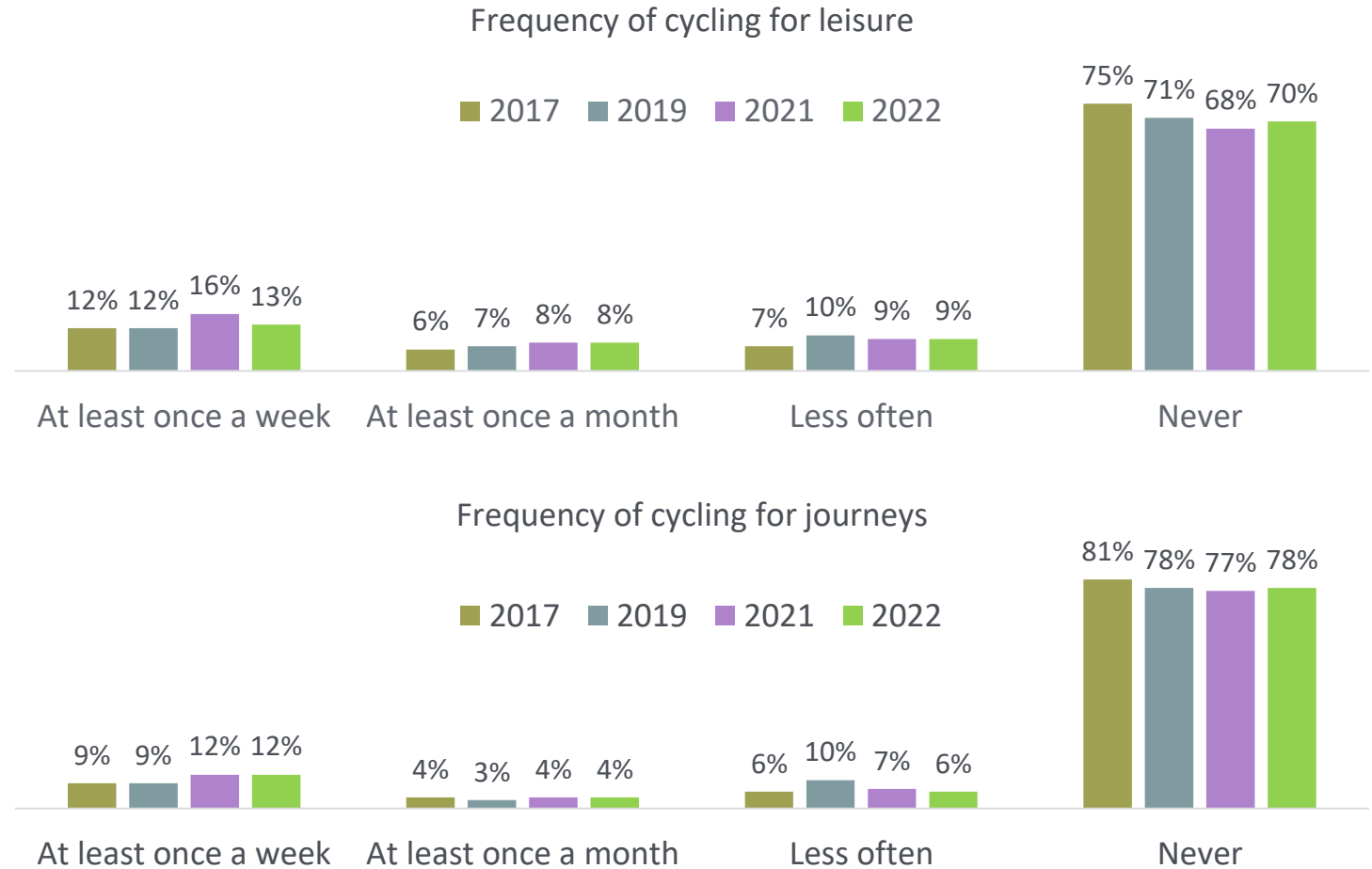


Cycling behaviours

Frequency

- In all four waves of the survey, people are more likely to use a bicycle for leisure than for journeys.
- The overall proportion of people who cycle for leisure and for journeys was consistent between 2022 and 2021, emphasising a broadly positive longer-term trend towards more regular cycling habits – the proportion of people who never cycle for leisure or for journeys was highest in 2017 (73% vs. 68% in 2022).

In 2022, the frequency of leisure/routine journeys was consistent with 2021



Base (all) 2017: 1060, 2019: 1049, 2021:1029, 2022: 1037

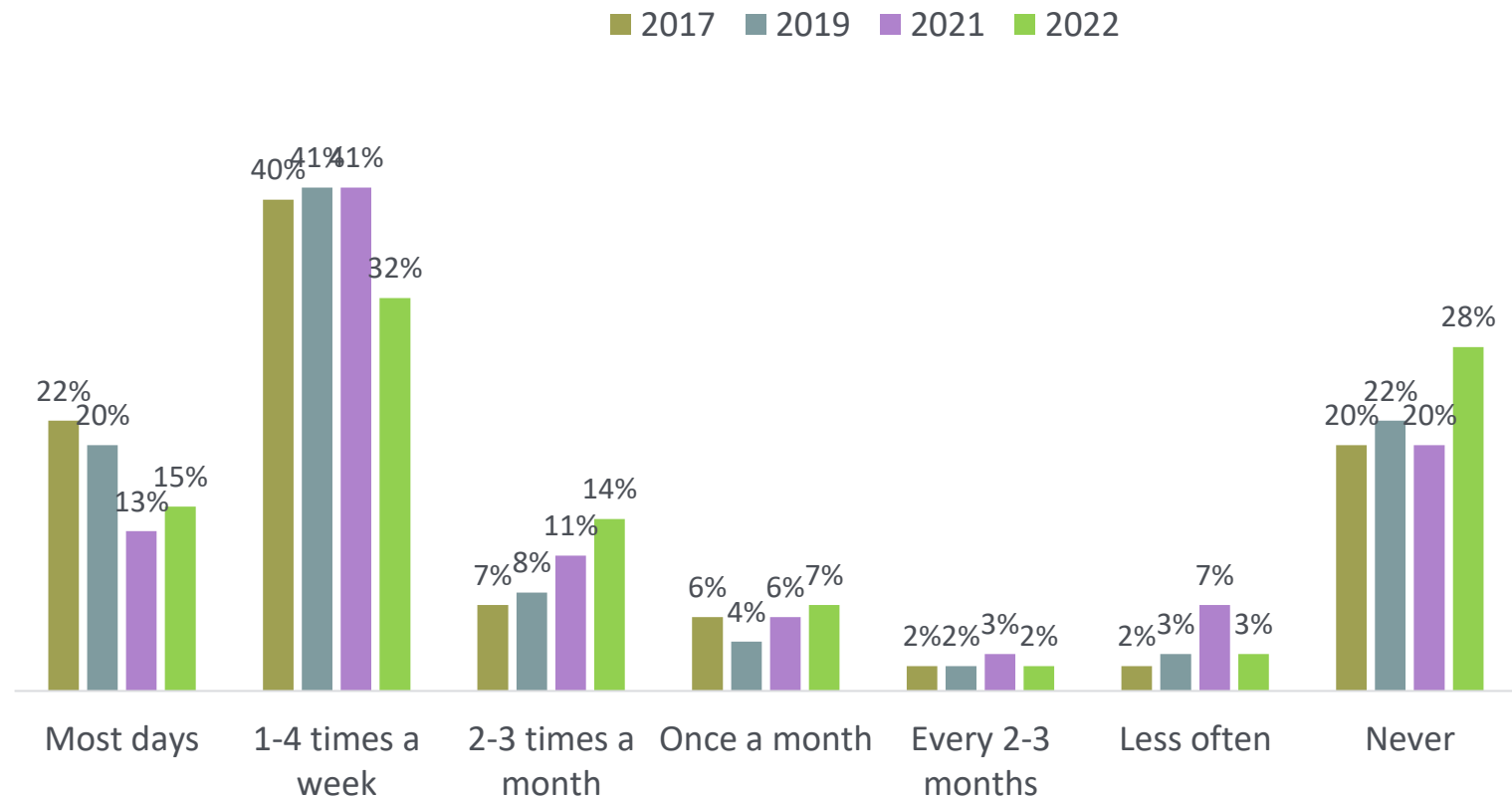
Cycling behaviours

Frequency of child cycling


- In contrast to the adult population, most (72%) children aged 6 to 15 years old cycle, according to their parents. This proportion has been broadly consistent over the last four waves of the tracker, although the proportion that do so was lowest in 2022.
- Children were most likely to cycle at least once a week (46%), with fewer reporting at least once a month (21%) or less often than this (5%). These findings were again consistent with previous waves.
- Additionally, we asked all people with children aged 11 or older whether their children had received Bikeability training at school – 54% reported they had, 27% had not, and 19% were unsure.

Q15: How often does your child tend to cycle, either for fun or for getting to school, friends' houses, etc.?

Over one in four (28%) reported their child does not cycle in 2022 – the highest of all previous waves



Base (all with children aged 6 to 15 yrs) 2017: 176, 2019: 192, 2021: 192, 2022: 184

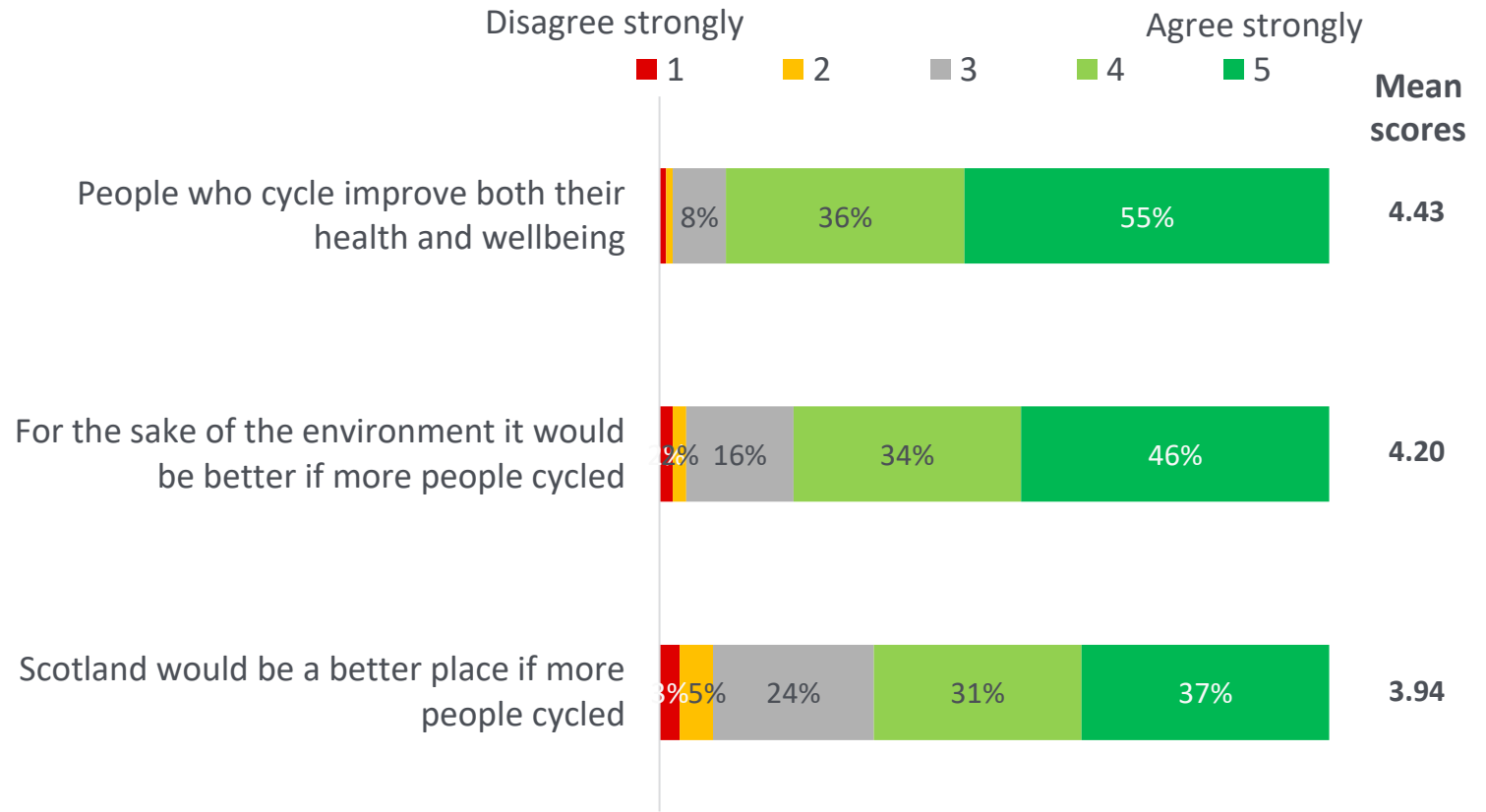


Attitudes to cycling

Attitudes to cycling

- In a general sense, people's attitudes towards cycling were very positive:
 - 91% agreed that people who cycle improve both their health and their wellbeing
 - 80% agreed that, for the sake of the environment, it would be better if more people cycled
 - 68% agreed that Scotland would be a better place if more people cycled

The vast majority agree that cycling would improve personal wellbeing, the environment, and society at large



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.

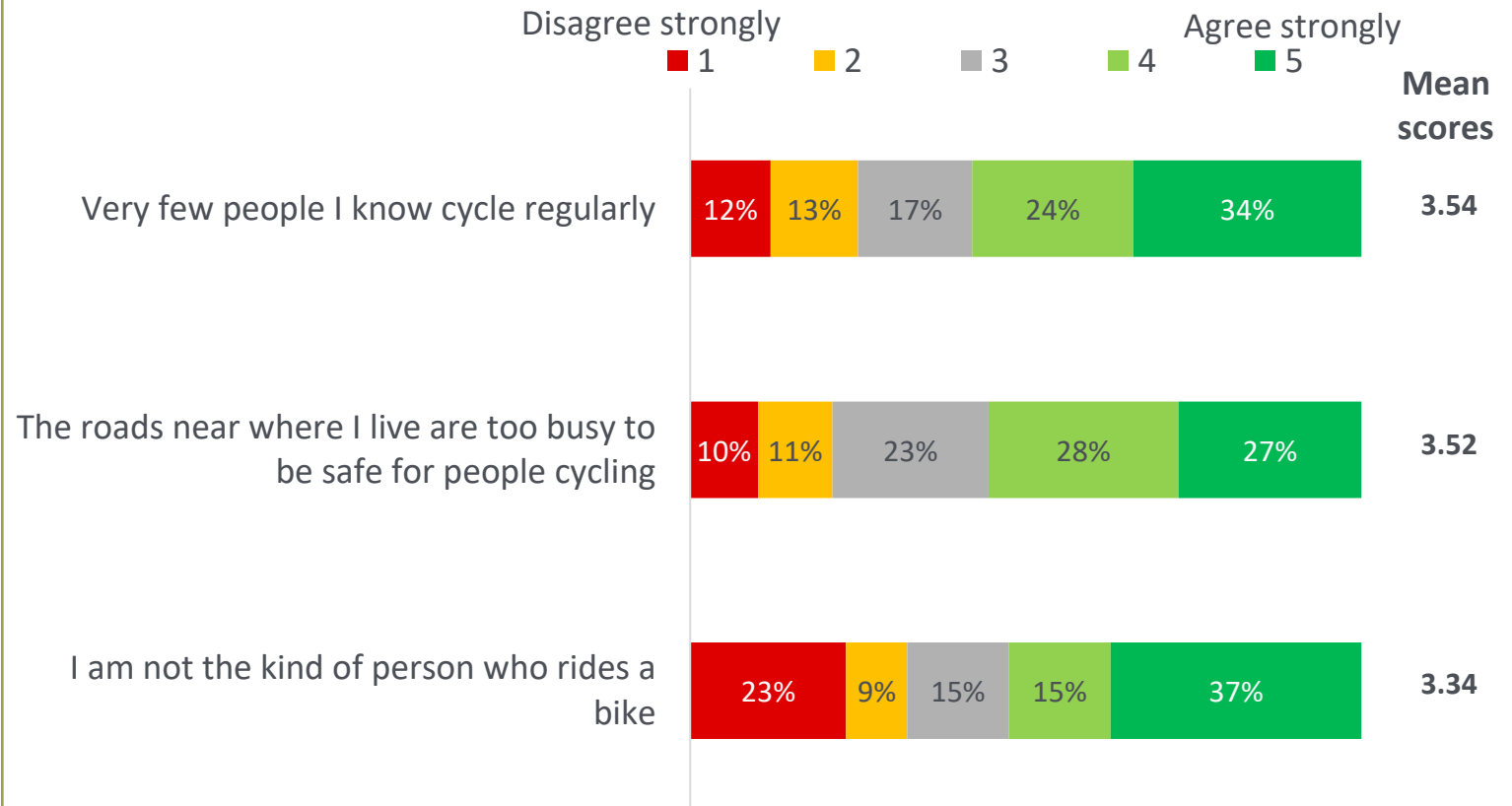
Base (all): 1037

Attitudes to cycling

- There are many barriers to cycling – over half (58%) agreed that they know very few people who cycle, and a similar proportion (56%) agreed that the roads near where they live are too busy to cycle safely.
- Additionally, around half (52%) agreed they are not the kind of person who rides a bike – notable for the high proportion (37%) that strongly agreed with this statement.

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.

But there are many barriers that put people off cycling, including not seeing oneself as a cyclist



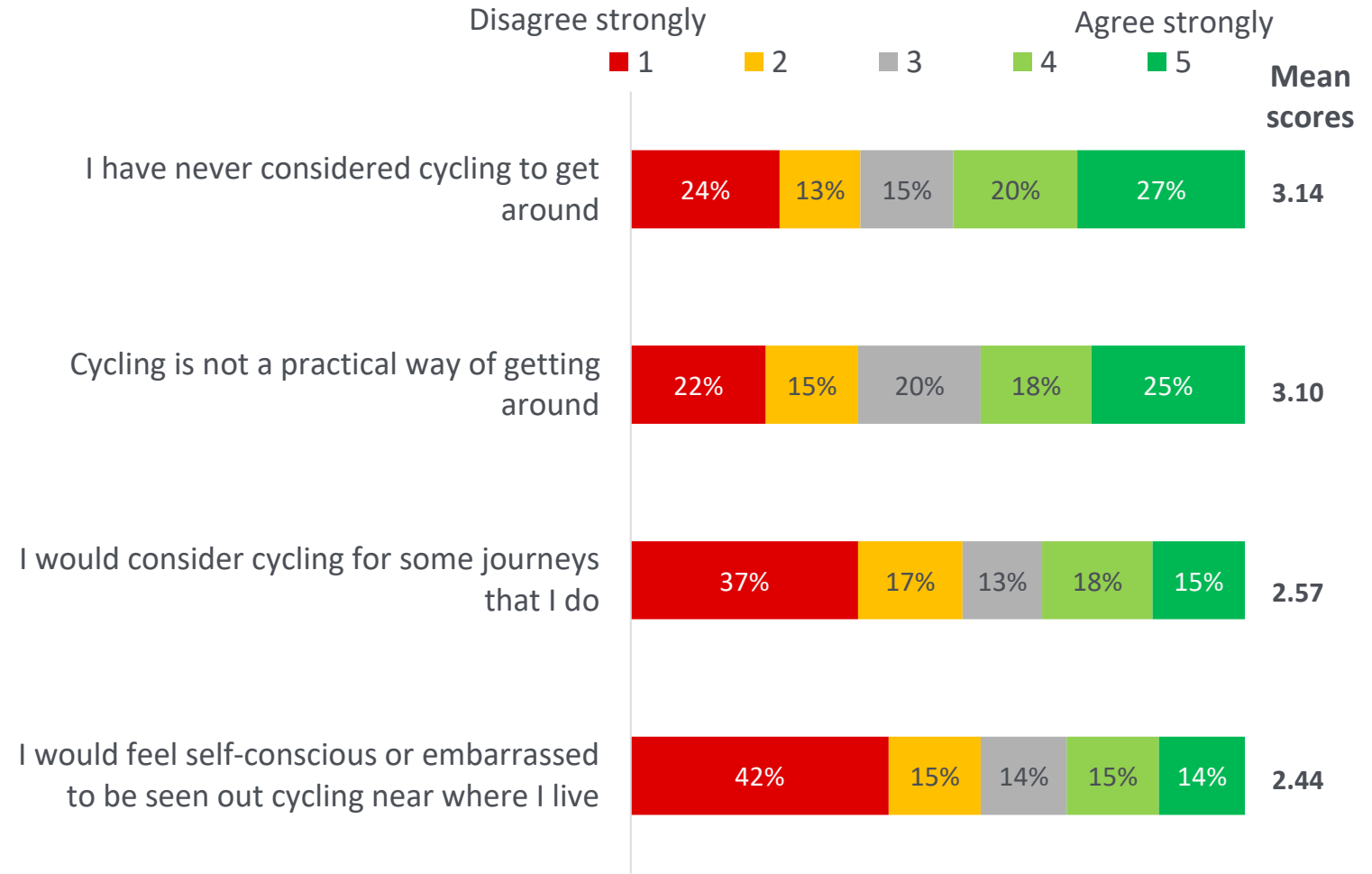
Base (all): 1037

Attitudes to cycling

- The level of agreement with these statements reinforces earlier findings about transport choices: relatively few reported they consider cycling as a means of transport.
- For instance, around half agreed (48%) they have never considered cycling to get around; and only a third (33%) agreed they would consider cycling for some journeys they do (over half – 54% - would not).
- Respondents were also slightly more likely to agree (43%) than disagree (37%) that cycling is not a practical way of getting around.

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.

And relatively few consider cycling as a means of transport for themselves

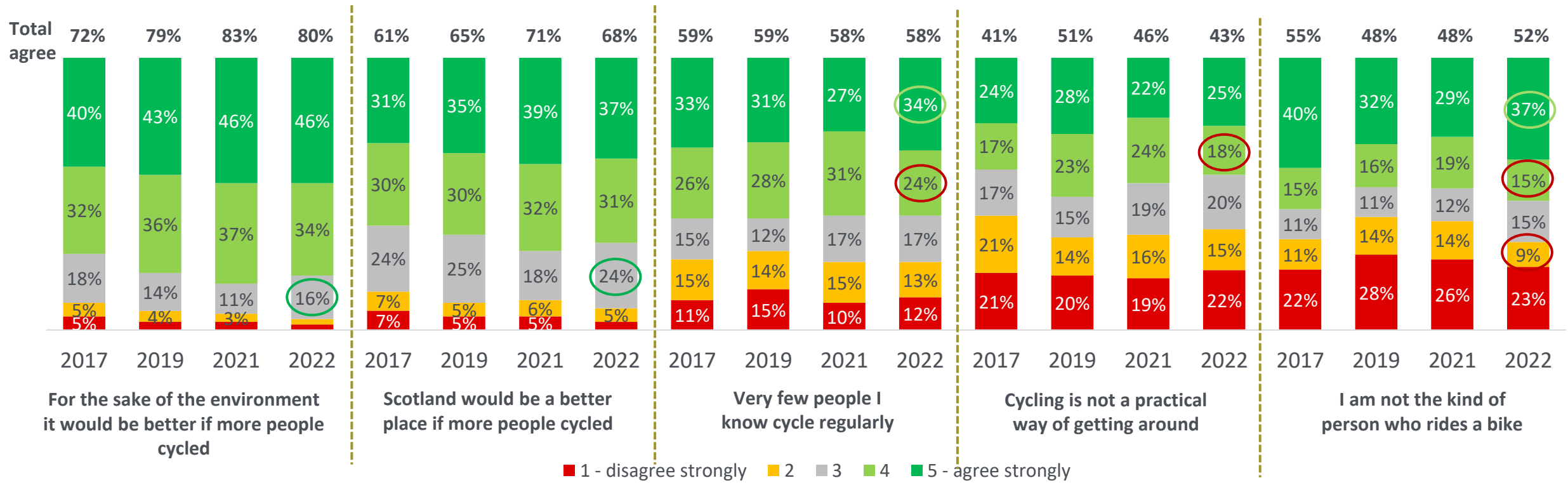


Base (all): 1037

Attitudes to cycling



There is an overall trend towards seeing cycle as positive for Scotland

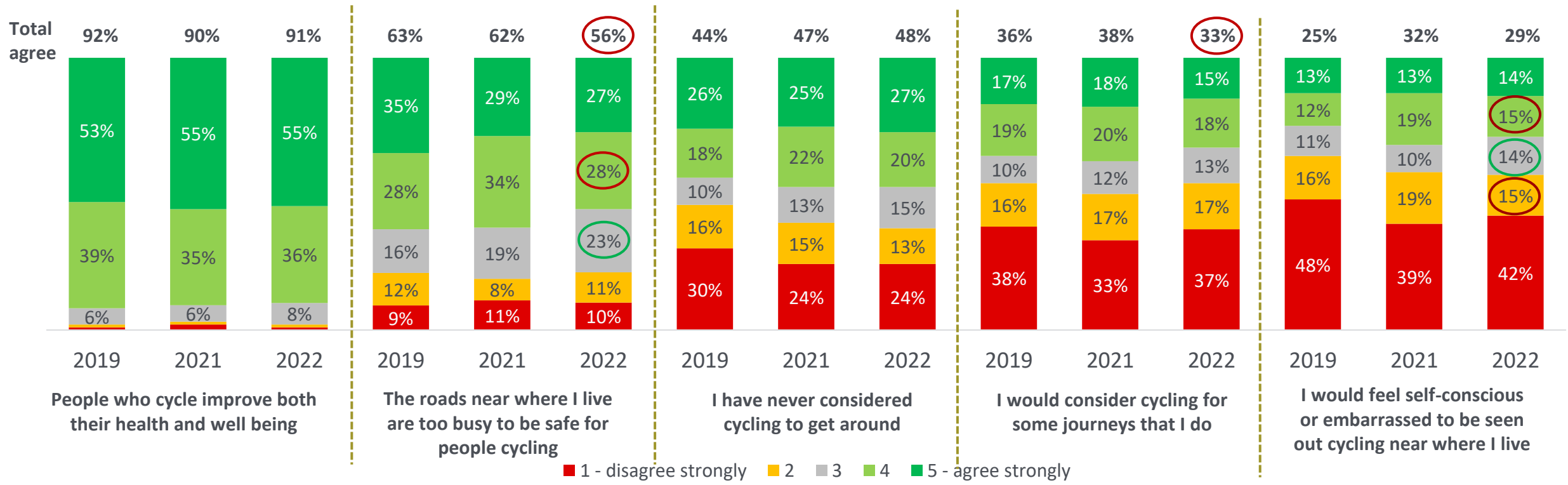


- Over time, there is a trend towards higher levels of agreement in relation to cycling being good for the environment and for Scotland. Agreement increased from lows of 72% and 61%, respectively, in 2017 to 80% and 68% in 2022.
- Less positively, there was an increase in the proportion of people strongly agreeing that very few people they know cycle regularly (34%, up from 27% in 2021) and that they are not the kind of person who rides a bike (37%, up from 29% in 2021).

Attitudes to cycling



Despite a decrease in people reporting the roads near where they live are too busy for cycling, fewer people agreed they would consider cycling for some journeys



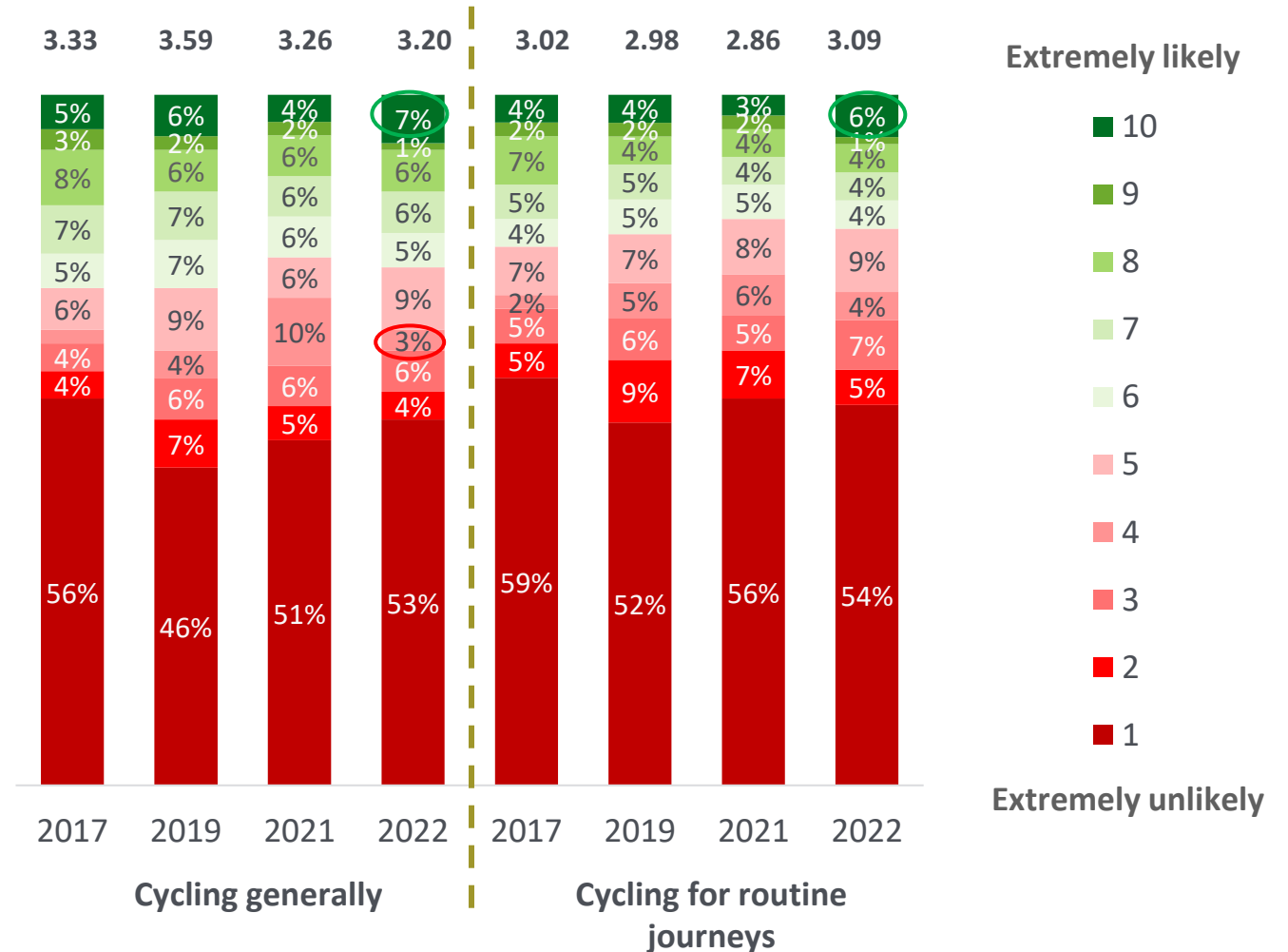
- There have been notable changes between 2021 and 2022 in relation to some attitudes around cycling – despite agreement about roads being too busy for cycling being at its lowest in 2022 (56%, compared with 62% in 2021), fewer people agreed they would consider cycling for some journeys (33%, compared with 38% in 2021). This gives some indication that perceptions around road safety do not necessarily translate to changes in attitudes towards cycling.
- Agreement with other attitudes has remained relatively consistent over time, although agreement about feeling self-conscious cycling near where they live remains higher than in 2019 (29% in 2022 vs. 25% in 2019).

Attitudes to cycling

Propensity to increase cycling

- The proportion of people who are likely (i.e., gave a score of 6-10) to increase the amount of cycling they do generally remained stable in 2022 compared with 2021 (24% and 23%, respectively). This is lower than in previous waves.
- However, while the proportion likely to increase the amount of cycling they do for routine journeys has also remained stable (20% and 18% in 2022 and 2021 respectively), the proportion reporting they are extremely likely was at its highest in 2022 (6% vs. 3% last year).
- There remains a core of people who reject cycling in the future – by scoring their likelihood with 1 out of 10. The scores in 2022 remain relatively consistent with previous waves.

The average score for likelihood of cycling for routine journeys was at its highest in 2022



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 routine journeys next 2-3 years?

Base (all) 2017: 1060, 2019: 1049, 2021: 1029, 2022: 1037

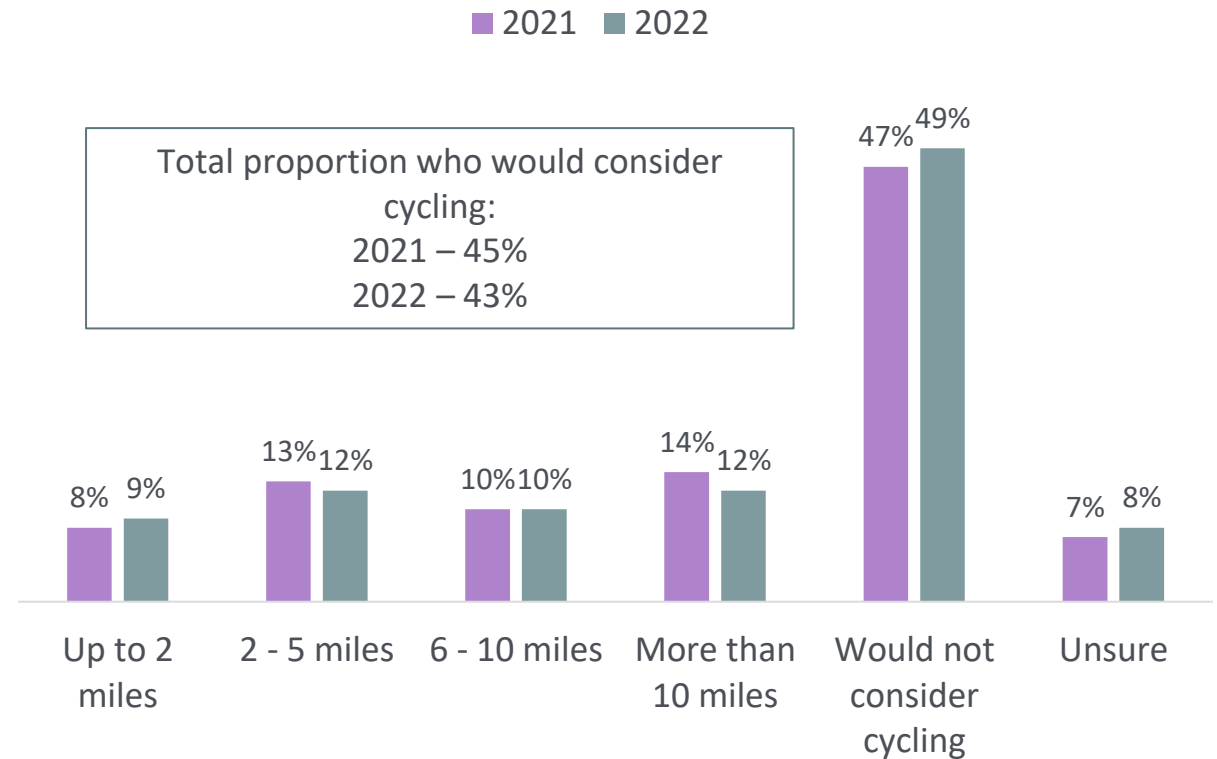
Attitudes to cycling

Distance willing to cycle

- A relatively even proportion would (43%) and would not (49%) consider cycling in 2022 – this is consistent with 2021 (when 45% reported they would consider cycling).
- Cycling more than 10 miles was something over 1 in 10 (12%) would consider – again, this was consistent with findings in 2021 (14%).

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

As in 2021, over 1 in 10 people would consider cycling more than 10 miles



Question added in 2021

Base (all) 2021: 1209, 2022: 1037

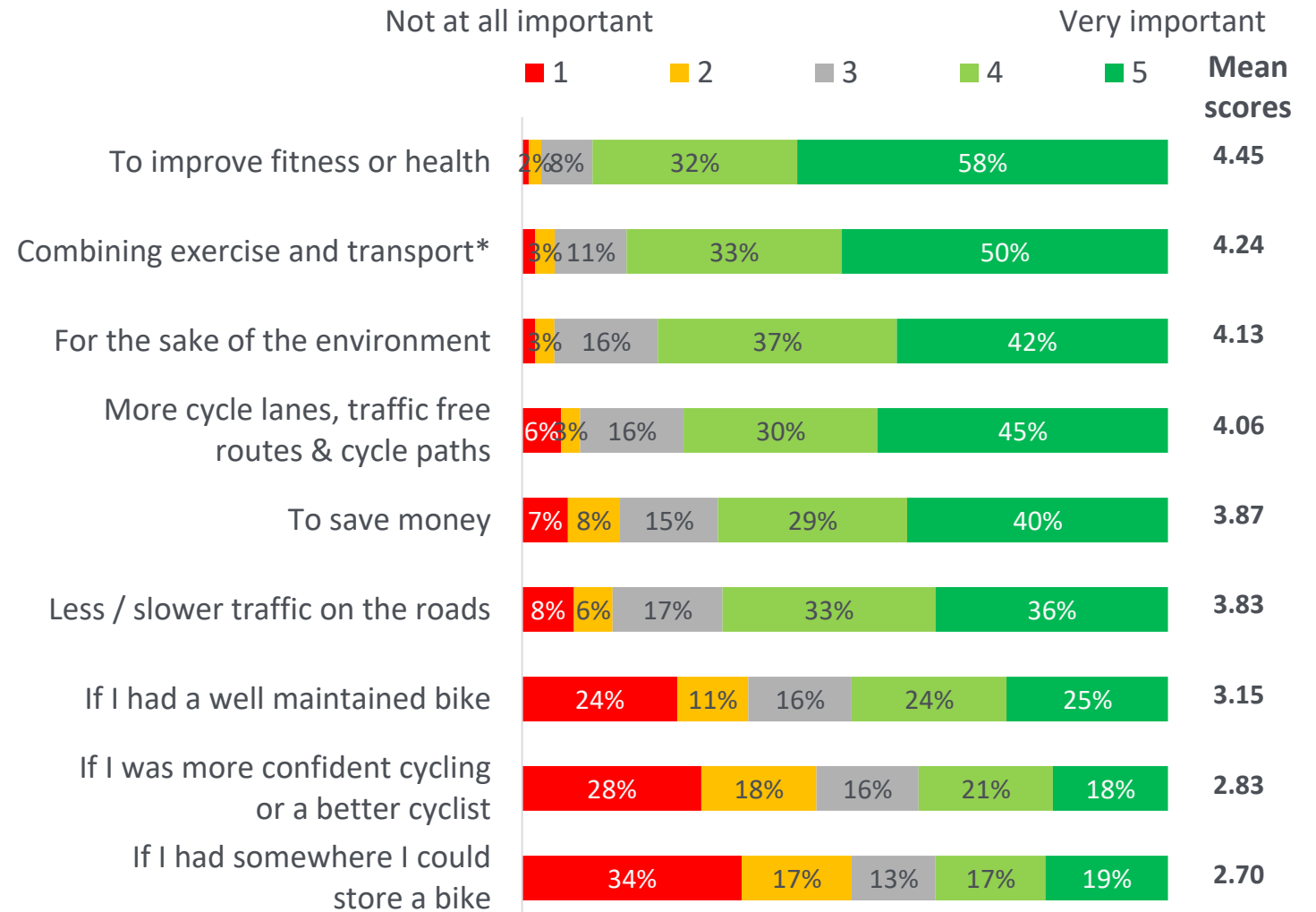
Attitudes to cycling

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 routine journeys.
- Reflecting the data collected in previous waves, the motivating factor with the highest importance rating was to improve health (90% reported this was important).
- Other highly motivating factors were combining exercise and transport (83%), for the sake of the environment (79%), and more cycle infrastructure (76%).



Factors relating to fitness, exercise and transportation were most important



*New option added in 2022

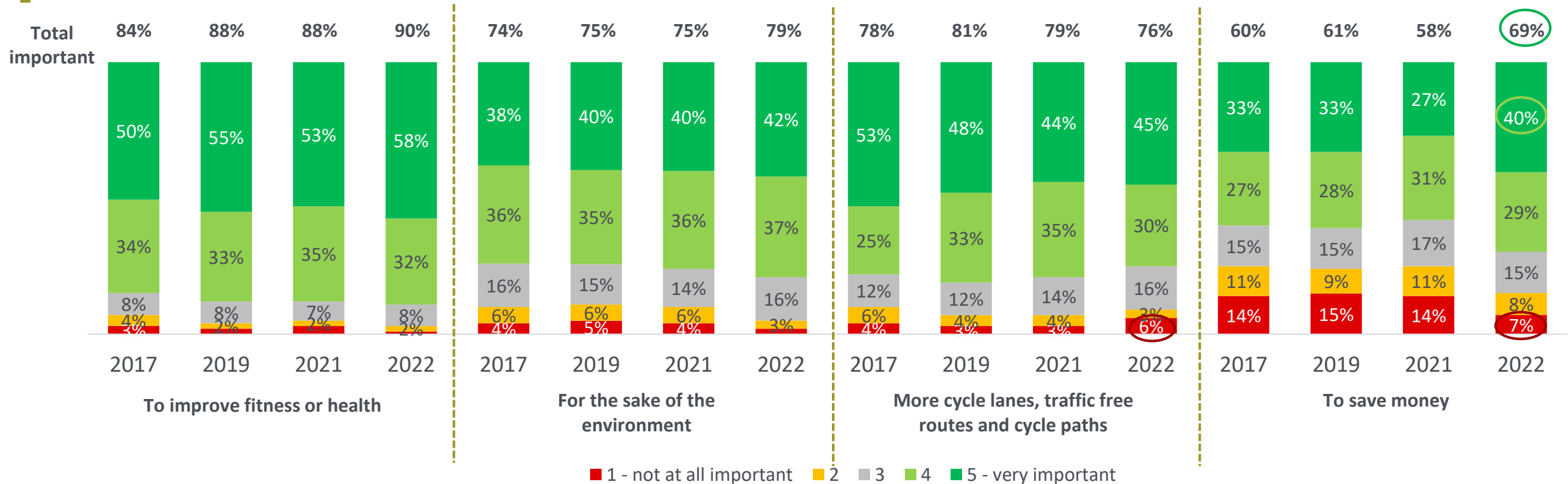
Base (all who score 3 or more for propensity to cycle – Q7/Q8): 446

Q9: I am going to read out a list of factors that some people have said would encourage them to cycle for routine 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 routine journeys.

Attitudes to cycling



Saving money was a more prominent reason for encouraging people to cycle in 2022

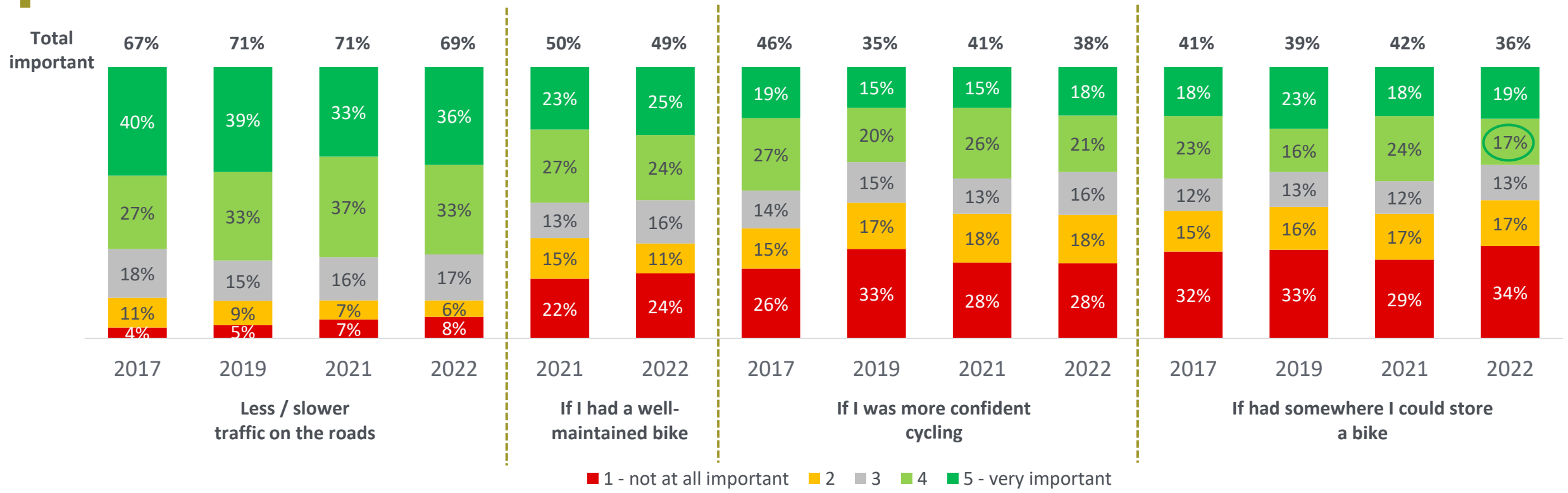


- There have been some notable long-term changes in relation to the most prevalent motivations that would encourage people to cycle more often for routine journeys.
- The importance of the following motivations for encouraging people to cycle more often was at an all-time high in 2022: improving fitness or health (90%), for the sake of the environment (79%), and to save money (69%) – the latter had increased significantly from the previous wave (when importance was at 58%).

Attitudes to cycling



The importance of the less prevalent motivations was also generally consistent



- The proportion of respondents that reported less traffic on the roads, a well-maintained bike, and somewhere to store a bike as important motivations has remained consistent over time.
- The importance of confidence cycling has fluctuated slightly more – it was lower in 2022 than in 2017, suggesting this is a less important factor for now for people.

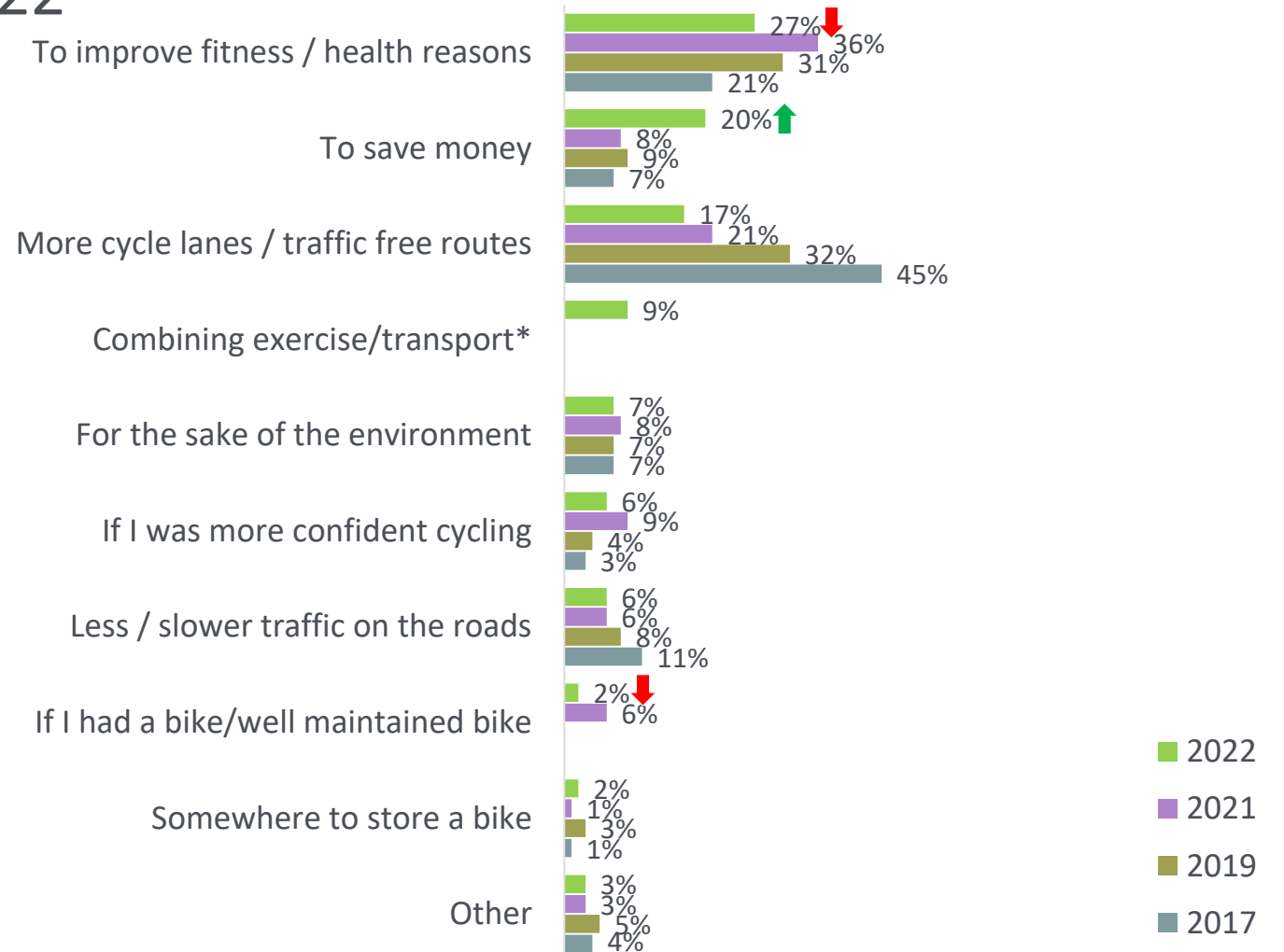
Attitudes to cycling

Key motivation to cycle

- When asked to select just one key motivator, improving fitness (27%) saving money (20%) and more cycle lanes and traffic free routes (17%) were the most frequently cited.
- However, there have been some significant changes over time – the proportion citing more cycle lanes as their key motivator has decreased year on year from 45% in 2017 to 17% in 2022. Improving health has also decreased (from 36% in 2021, to 27% in 2022) as the key motivator.
- On the other hand, saving money has become a substantially more prominent key motivator in 2022 (20%, up from 8% in 2021). This may reflect the cost of living crisis evident in 2022.

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

Saving money was a more prominent main reason for encouraging people to cycle in 2022



*New options added in 2022

Base (all who score 3 or more for propensity to cycle – Q10/Q11) 2017: 429, 2019: 497, 2021: 466, 2022: 446

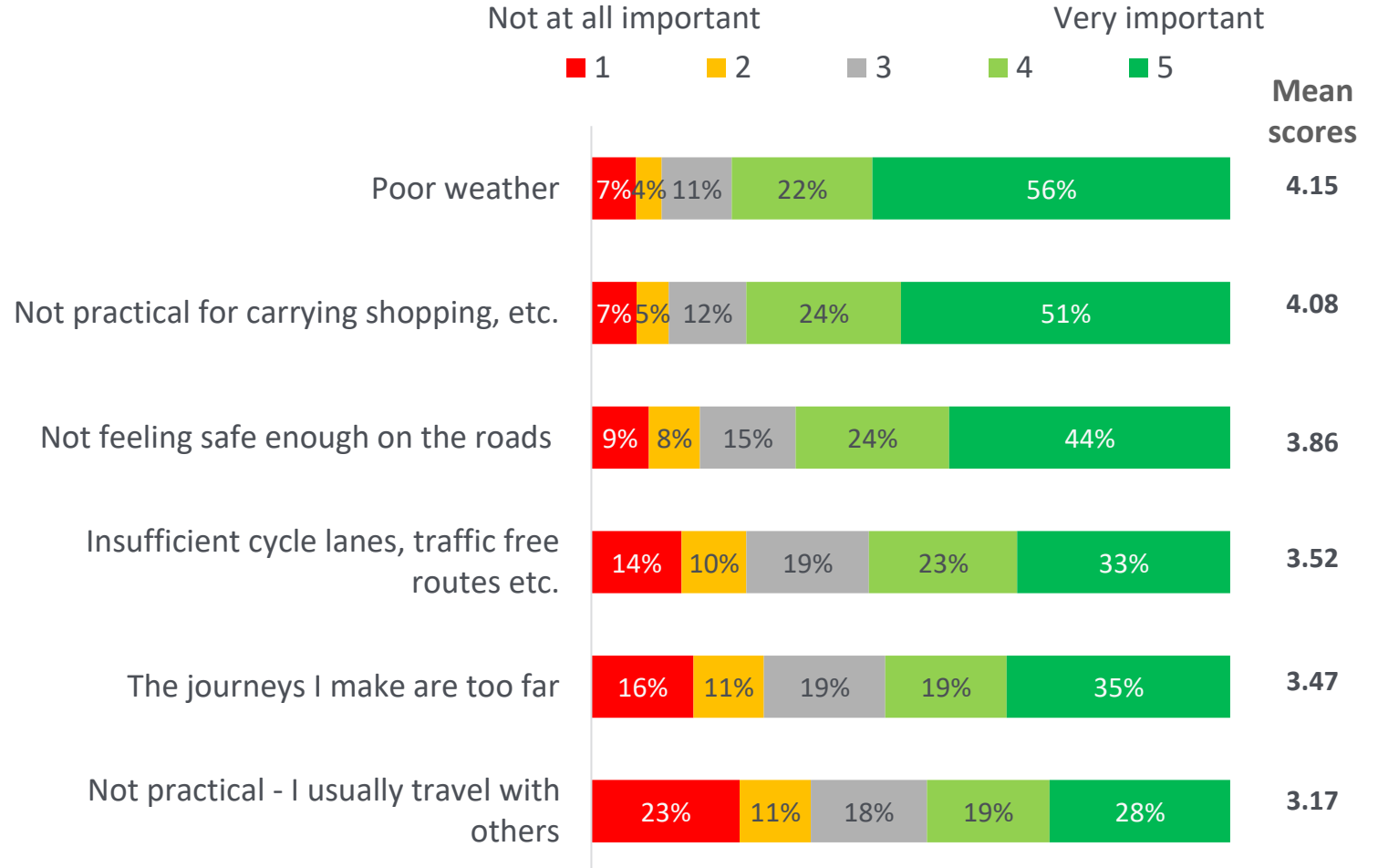
Attitudes to cycling

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 routine 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:
 - Poor weather (78%)
 - Not practical for carrying things (75% important)
 - Not feeling safe on roads (68%)
 - Insufficient cycle lanes / traffic free options (57%)

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 routine journeys. For each factor, please tell me how important it is to you in preventing you from cycling more for routine journeys.

Poor weather, practicality and safety were again the most important barriers to cycling for routine journeys



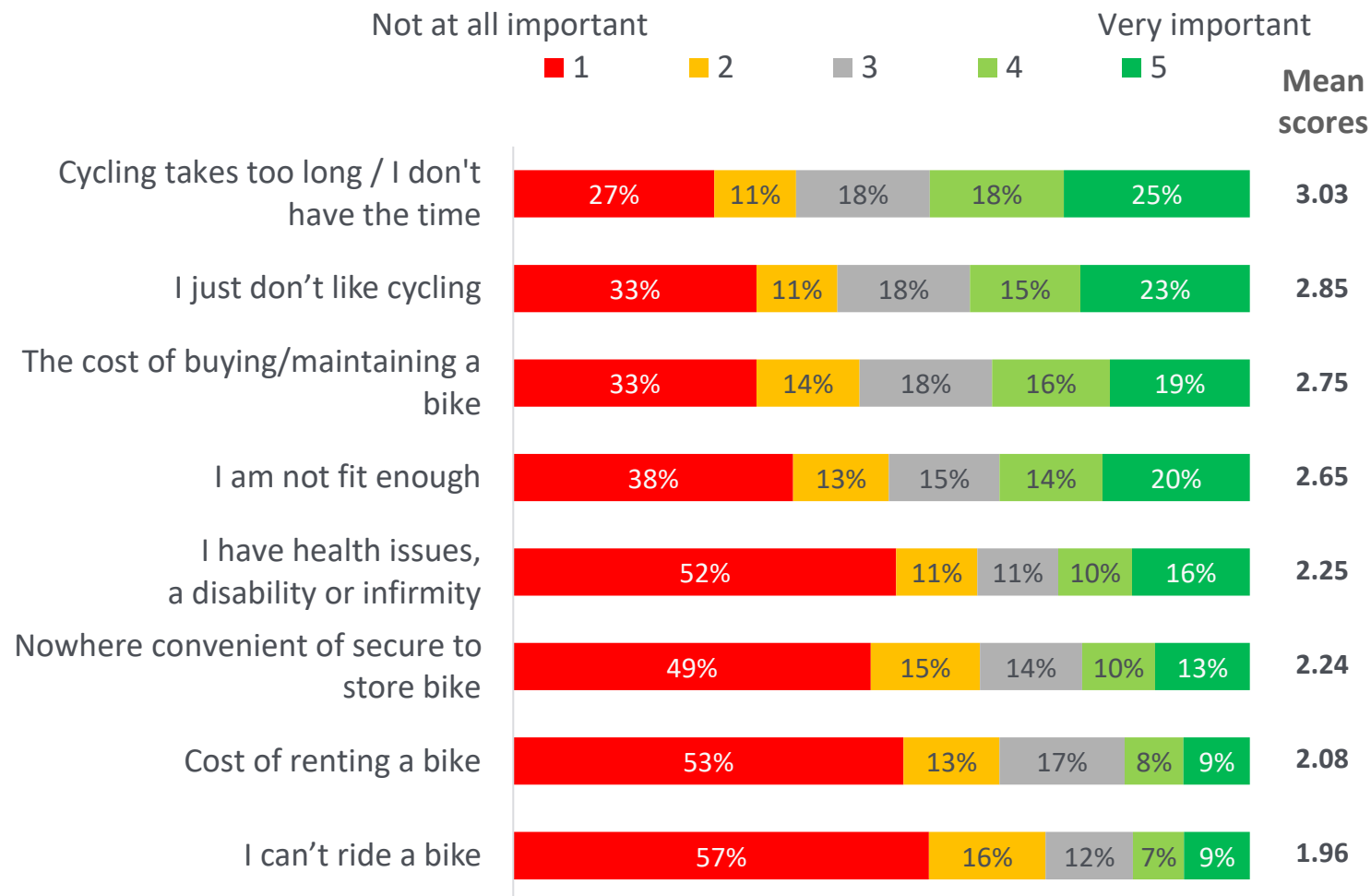
Base (all): 1037

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 – this is consistent with previous waves.
- These included not having the time (43% important), the cost of cycling (35% important), not being fit enough (34% important), health (26% important) and simply not liking cycling (38% important).
 - However, these are likely to be significant obstacles to the people who experience them

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



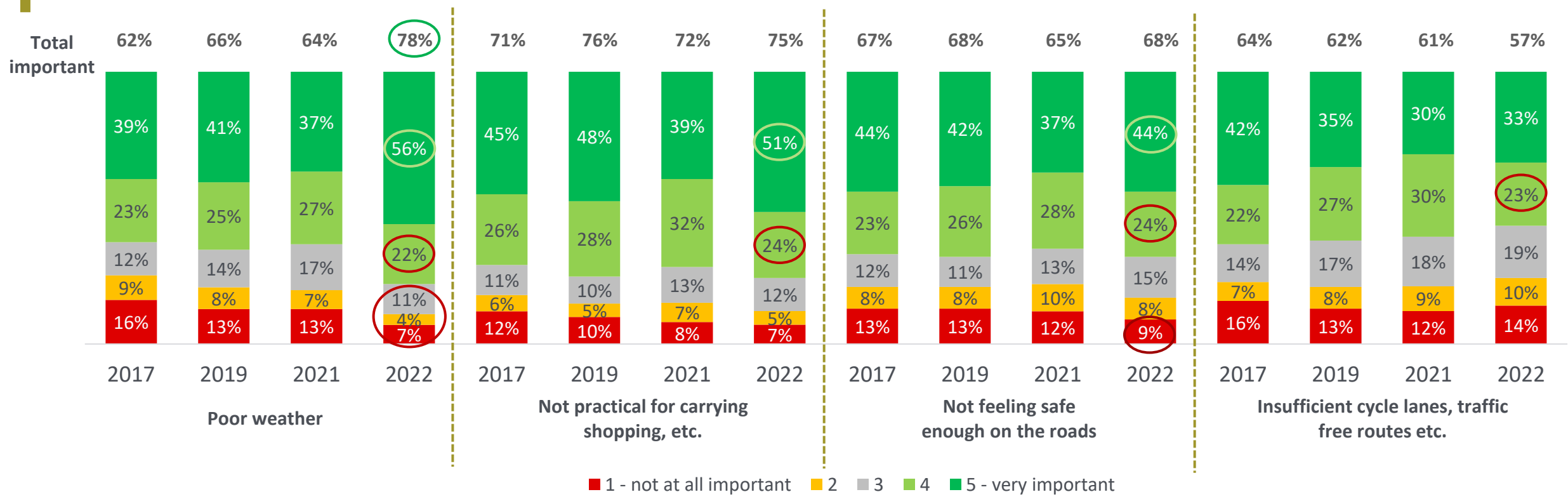
Base (all): 1037

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 routine journeys. For each factor, please tell me how important it is to you in preventing you from cycling more for routine journeys.

Attitudes to cycling



Poor weather was a significantly greater barrier in 2022

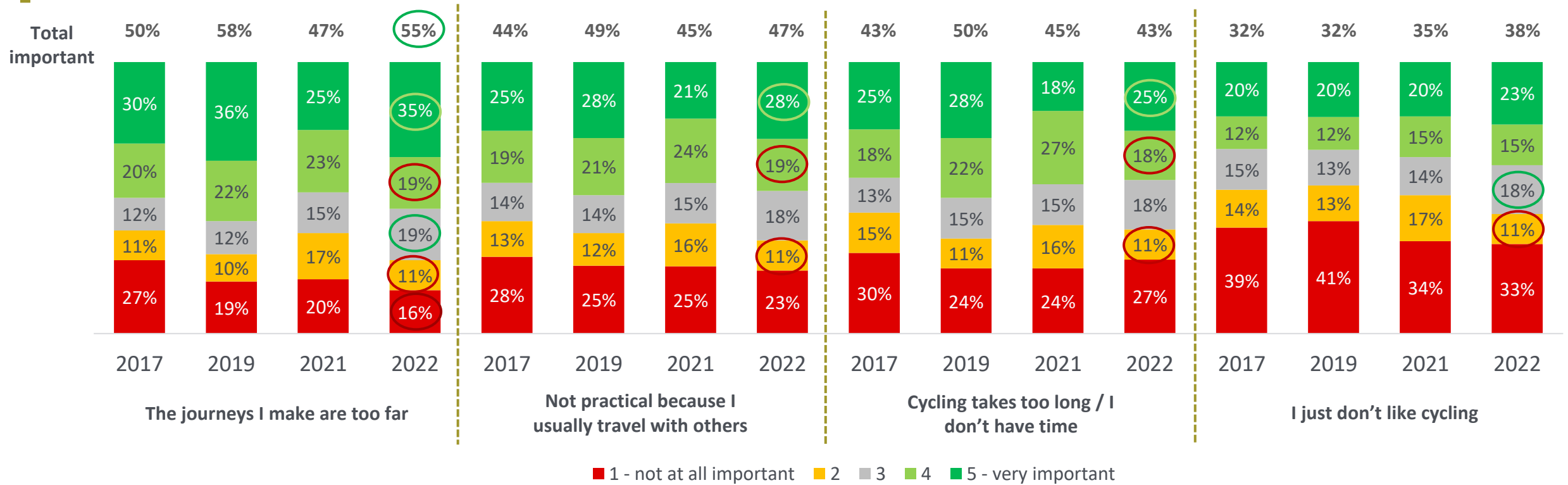


- There have been some significant changes in the importance of barriers in 2022. The proportion of people describing the following barriers as very important increased in 2022: poor weather (56% vs. 37% in 2021), practicality for carrying shopping (51% vs. 39% in 2021), and feeling safe on the roads (44% vs. 37% in 2021). This tended to bring the results in line with the figures in 2017 and 2019.
- At an overall level, poor weather became the most important barrier in 2022, having been second-most important in 2021 (64% described it as important in 2021, compared with 78% in 2022). Positively, however, insufficient cycle lanes has become less of a barrier year on year.

Attitudes to cycling



Long journeys being a barrier reverted to the high of 2019 following a dip in 2021

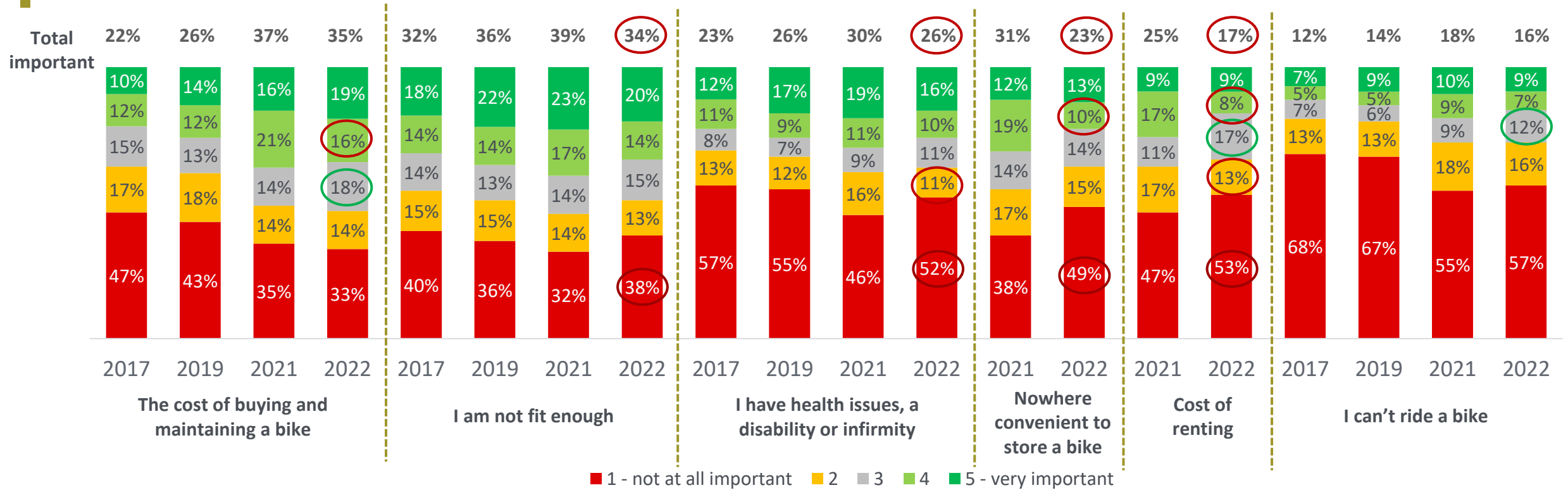


- Again, there were some notable changes between the 2022 and 2021 waves of the survey; the strength of importance of these barriers was closer to earlier waves (2017 and 2019) after a dip in 2021. For instance, long journeys was an important barrier for 55% of people in 2022, significantly higher than in 2021 (47%), and more in line with 2019 (58%) and 2017 (50%).
- In relation to longer-term trends, the proportion reporting they don't like cycling as an important barrier reached an all-time high in 2022 (38%, up from 32% in 2017).

Attitudes to cycling



Not being fit enough and having health issues were less important barriers in 2022 compared with 2021, bringing them closer in line with earlier waves of the survey



- There were a number of changes between 2021 and 2022 in relation to these less prevalent barriers. Not being fit enough and having health issues were less important this wave – not being fit enough dropped from 39% in 2021 to 34% in 2022, and having health issues dropped from 30% to 26% over the same period. The figures in 2022 were closer to those of earlier waves of the survey.
- Other changes this wave included a drop in the proportion saying having nowhere convenient to store a bike was an important barrier (from 31% in 2021 to 23% in 2022); and the cost of renting a bike (which dropped from 25% to 17% over the same period).

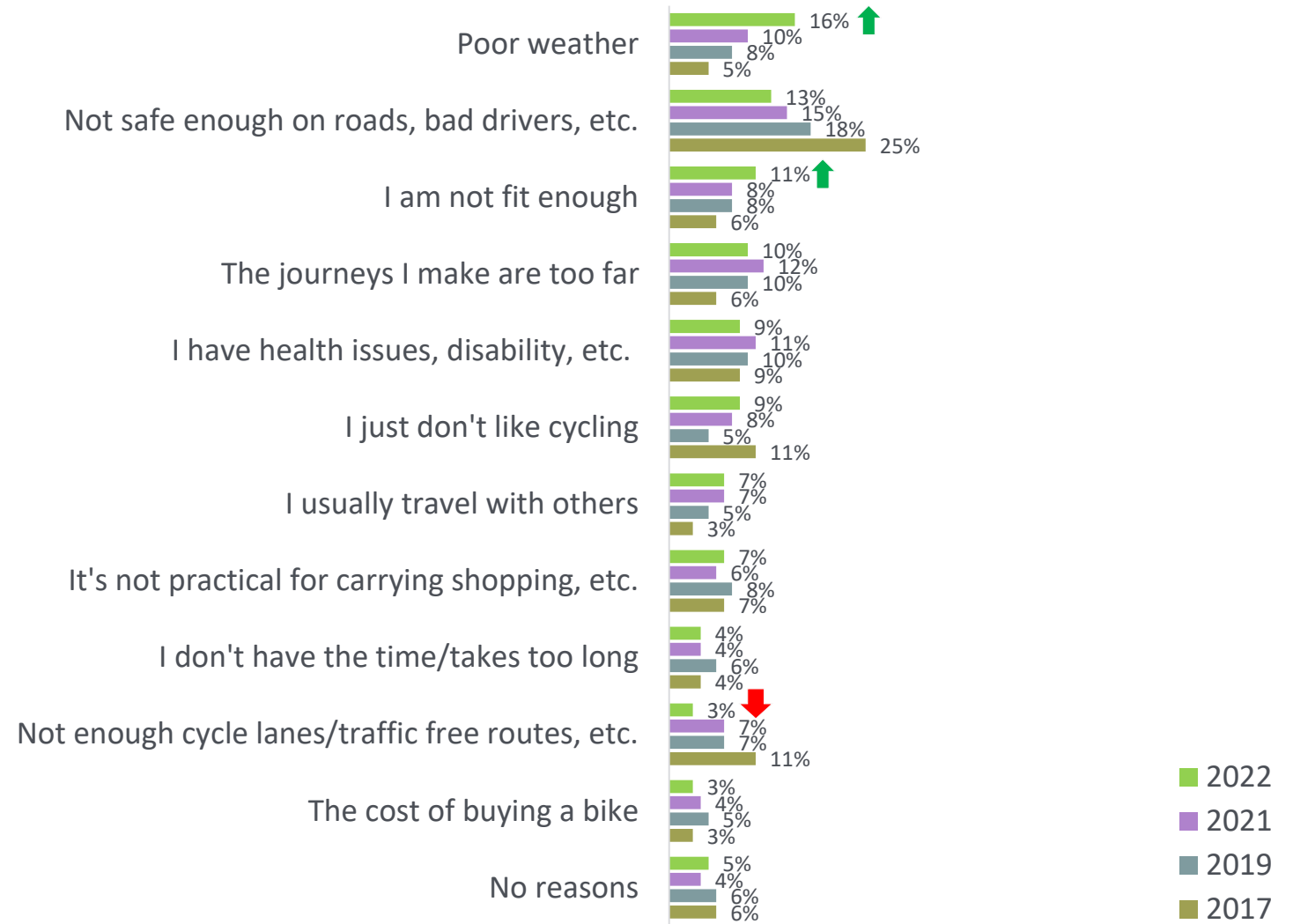
Attitudes to cycling

Key barrier to cycling

- Respondents were asked to pick one key barrier that prevents them from cycling or cycling more often for routine journeys.
- Reflecting the previous waves of the tracker, no single barrier stood out as a significant issue for a large proportion of the population in 2022.
- There have, however, been some notable changes over time – poor weather as the main barrier to cycling was most common in 2022 (16% – representing the highest proportion of any wave of the survey). The same was true for not being fit enough (11% reported this as the main barrier - up from 8% in 2021, and 6% in 2017).

Q12: What would be the one main reason that you do not cycle / do not cycle more often for routine journeys?

As in 2021, there was not one clear, main barrier to cycling



Base (all) 2017: 1060, 2019: 1049, 2021: 1029, 2022: 1037



Segmentation analysis

Segmentation analysis

Defining characteristics



- Segmentation analysis was conducted in previous waves 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; Q12 – main reason for not cycling more.
- Ten segments were developed based on these questions. This model has also been applied to the 2022 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
Total	All people who cycle
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
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

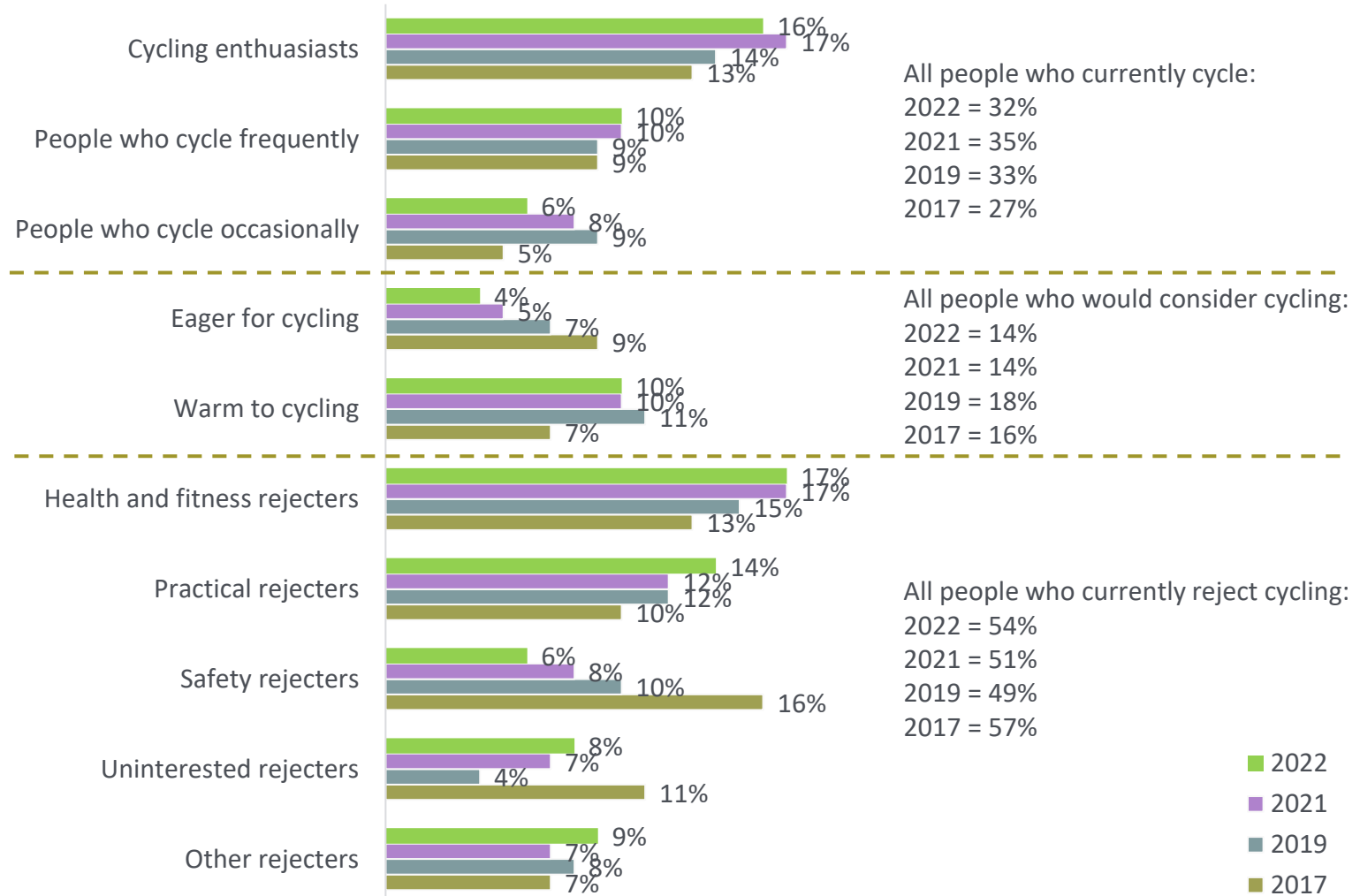
*The new code 'nowhere convenient or secure to store a bike' was added to the practical rejecters segment in 2021

Segmentation


- Consistent with the previous two waves, 32% of the sample reported that they ever cycle in 2022. This proportion remains higher than in 2017, when 27% ever cycled.
- The split in terms of frequency of cycling was also very similar to 2021 – 16% were cycling enthusiasts, 10% were frequent cyclists and 6% were occasional cyclists.
- Amongst non-cyclists, the proportion eager to cycle has decreased over consecutive waves (from 9% in 2017, to 4% in 2022).
- The proportion who currently reject taking up cycling in the next 2 to 3 years was consistent at around half of the sample (54%) – this year, however, represented the highest proportion of rejectors since 2017 (when 57% rejected).
- There have been some notable changes in the distribution of rejector types over time, with practical rejectors increasing (from 10% in 2017, to 14% in 2022) and safety rejectors decreasing (from 16% to 6% over the same period).



The size of most of the segments was consistent with 2021 data



Base (all) 2017: 1060, 2019: 1049, 2021:1029, 2022:1037



Gender analysis

Key insights

Gender differences

Note: Men includes trans men and women includes trans women



- Men have a consistently more positive relationship to (and outlook on) cycling than women.
- At a basic level, they were more likely than women to have access to a bike in their household (41% vs. 33%) and were also more likely to report they had somewhere to conveniently and safely store a bike where they live (86% vs. 76%).
- As might be expected – given this context – more men were cyclists (40% ever cycled, either for leisure or transport purposes, compared with 24% of women). They were also more likely to be frequent cyclists, 9% cycling for journeys most days (compared with 2% of women). Indeed, women were more likely than men to reject cycling based on interest (10% vs. 5% of men) and safety concerns (9% vs. 3% of men).
- Despite greater current usage, men also had a greater propensity for cycling in the next 2-3 years, both from a general (29% vs. 18% of women) and routine journey (25% vs. 16%) perspective. This indicates that the disparity in bike usage is likely to continue in future.
- From an attitudinal perspective, as in previous waves, women were less likely to associate with cycling than men. They were more likely to agree ‘I am not the kind of person who rides a bike’ (61% of women vs. 43% of men); ‘I would feel self-conscious riding a bike’ (42% vs. 16%); and ‘I have never considered cycling to get around’ (57% vs. 38%). This discrepancy is increasing in some instances – the gap between women and men in terms of never considering cycling to get around increased from 12% in 2021 to 19% in 2022.
- There were also key differences between men and women in terms of the things they consider important in encouraging them to cycle more. Women were more likely to think the following factors were important:
 - Less traffic on the roads (77% vs. 63% of men).
 - If I was more confident cycling (49% vs. 30% of men).
- On the flipside, men were more likely to think the following factors were important:
 - To save money (74% vs. 64% of women).
- Women were also more likely to consider several barriers preventing them from cycling to be important, most notably: poor weather (85% vs 71% of men); not practical for carrying luggage (82% vs. 69% of men); not feeling safe on roads (80% vs. 56%); and insufficient cycle lanes (63% vs 50%).



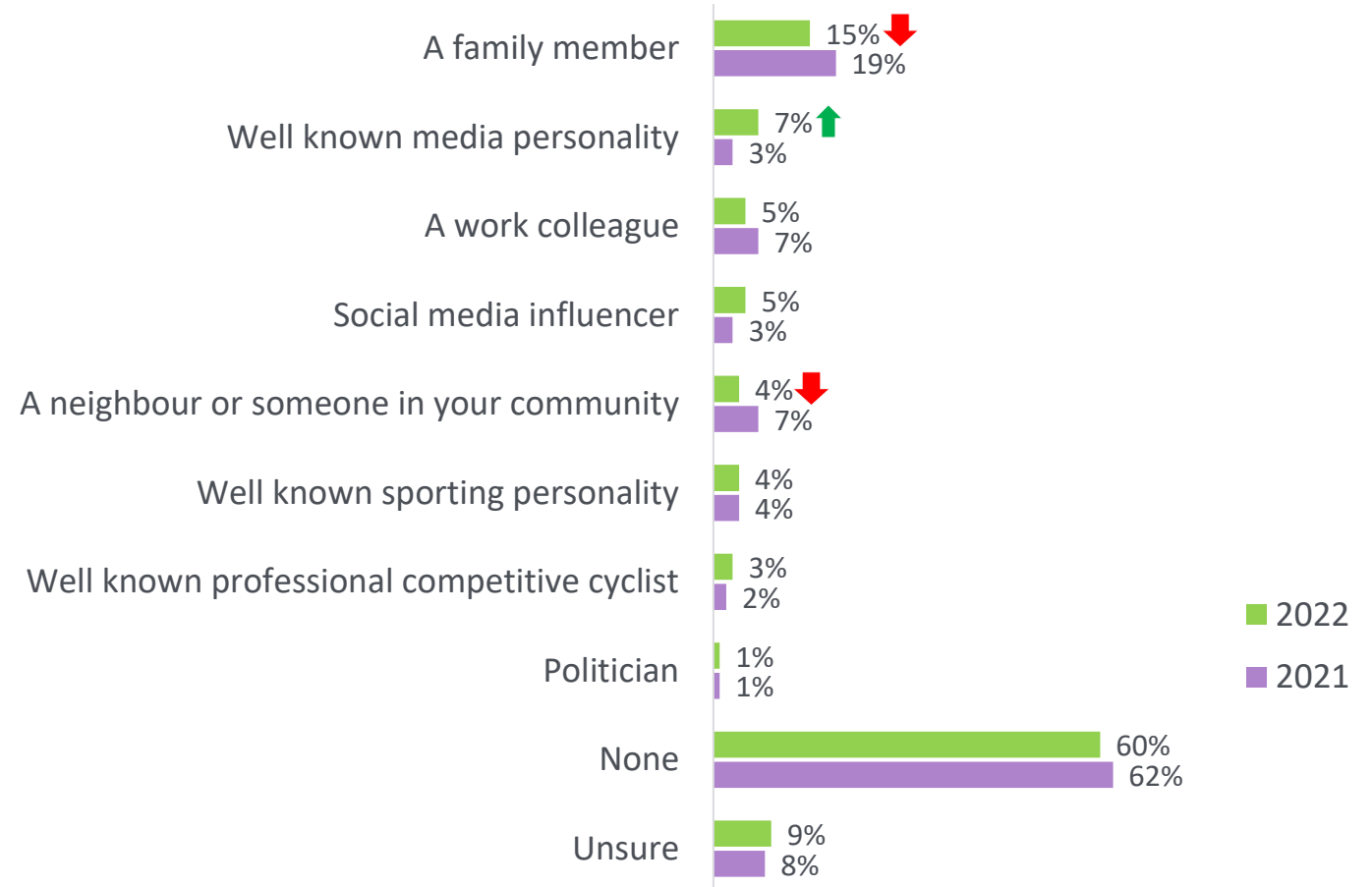
Influence of people on propensity to cycle

Influence of people on cycling

- Overall, around one in three (31%) respondents stated they might be encouraged to cycle more often by someone else.
- This was most likely to be a family member (15%) - twice as likely as any other source of endorsement.
- However, there have been some notable changes over time, with a family member less influential this year compared with 2021 (when 19% reported they would be encouraged to cycle by this group).
- Conversely, the likely influence of well-known media personalities on cycling behaviours increased (from 3% reporting this in 2021, to 7% in 2022).

Q17: 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?

A family member remained the most likely source to encourage people to cycle – but was less prominent than in 2021



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

Base (all): 2021: 1029, 2022: 1037



Summary and conclusions

Summary and conclusions

More people cycled (either for transport or leisure) in 2022 compared with a few years ago, but proportions have been consistent for past 3 years

- Around one third reported they cycle in 2022 compared with just over a quarter in 2017.
- The profile of people who cycle continues to be skewed to men, younger age groups and higher socio-economic groups.

There has been some divergence this year in terms of propensity to cycle

- While the appetite for general cycling was very similar between 2021 and 2022, there was a greater appetite for cycling for journeys (3.09 out of 10 – the highest of any wave).
- There was also a small minority (around 6-7%) that were extremely likely to start cycling or increase the amount of cycling they do in the next few years. This minority was larger than in previous years, suggesting there is a small but growing contingent of highly enthusiastic people.

Cyclists use bikes to improve their health and the environment, and even non-cyclists agreed about these benefits

- The main reasons people use a bike are to improve their health and wellbeing, and for environmental reasons.
- And when asked about statements people have made about cycling, the majority agreed that cycling is beneficial from a personal, environmental and societal perspective – this suggests there is a consensus about the benefits of using a bike.

There continues to be many barriers to using a bike

- Despite these positive perceptions of cycling, many didn't see themselves as cyclists, or they considered cycling impractical, or they simply haven't considered cycling for some journeys they make. This suggests a cultural impasse remains.

Summary and conclusions

There were some green shoots around cycling safety and road infrastructure

- Despite the ongoing challenges around personal and societal barriers to cycling, there were some positive signs this year. Fewer people agreed that the roads near where they live are too busy to be safe for people cycling, and insufficient cycle lanes/traffic free routes appears to be less of a barrier in 2022.
- Further reinforcing this point, the portion of ‘safety rejectors’ in the segmentation analysis decreased to its lowest proportion in 2022.

Money was a key motivator to cycling in 2022

- Despite motivations to cycling generally reflecting previous waves of the survey, the lower cost of cycling has become a more central factor in people’s thinking in 2022, possibly reflecting the financial constraints many people are experiencing.

The main barriers to cycling in 2022 were similar to previous years

- Not practical, not feeling safe, the weather and insufficient cycling infrastructure were again the top answers in relation to the importance of barriers. However, poor weather was the single most significant barrier in 2022, overtaking practicality and feeling safe.

Cycling rejectors tend to do so for practical and fitness reasons

- While a minority of non-cyclists would consider it (they are either eager to start or warm to the idea), most non-cyclists are rejectors.
- People reject cycling principally for two reasons – from a health/fitness perspective, or for practical reasons. Focusing on the people within these groups who have surmountable fitness/practical concerns is key for increasing the number of cyclists in future.

Thank you



Contact

Diane McGregor
Diane.mcgregor@progressivepartnership.co.uk

Jonnie Felton
Jonnie.felton@progressivepartnership.co.uk

Progressive Partnership
Q Court, 3 Quality Street
Edinburgh,
EH4 5BP

0131 316 1900

info@progressivepartnership.co.uk

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Appendix I

- Sample profile

Sample profile

Location

- The sample was designed to be broadly representative of the Scottish population.
 - As in previous waves, sampling did not include remote rural areas or islands
- Sampling also aimed to provide a mix of urban and rural locations.
- The sample size in the Highland local authority is proportionally higher than the Scottish population – additional interviews were conducted in order to compensate for not conducting interviews on islands.
- Geographical profiles across the 4 waves of research are very closely matched.

Local authority



Sample profile

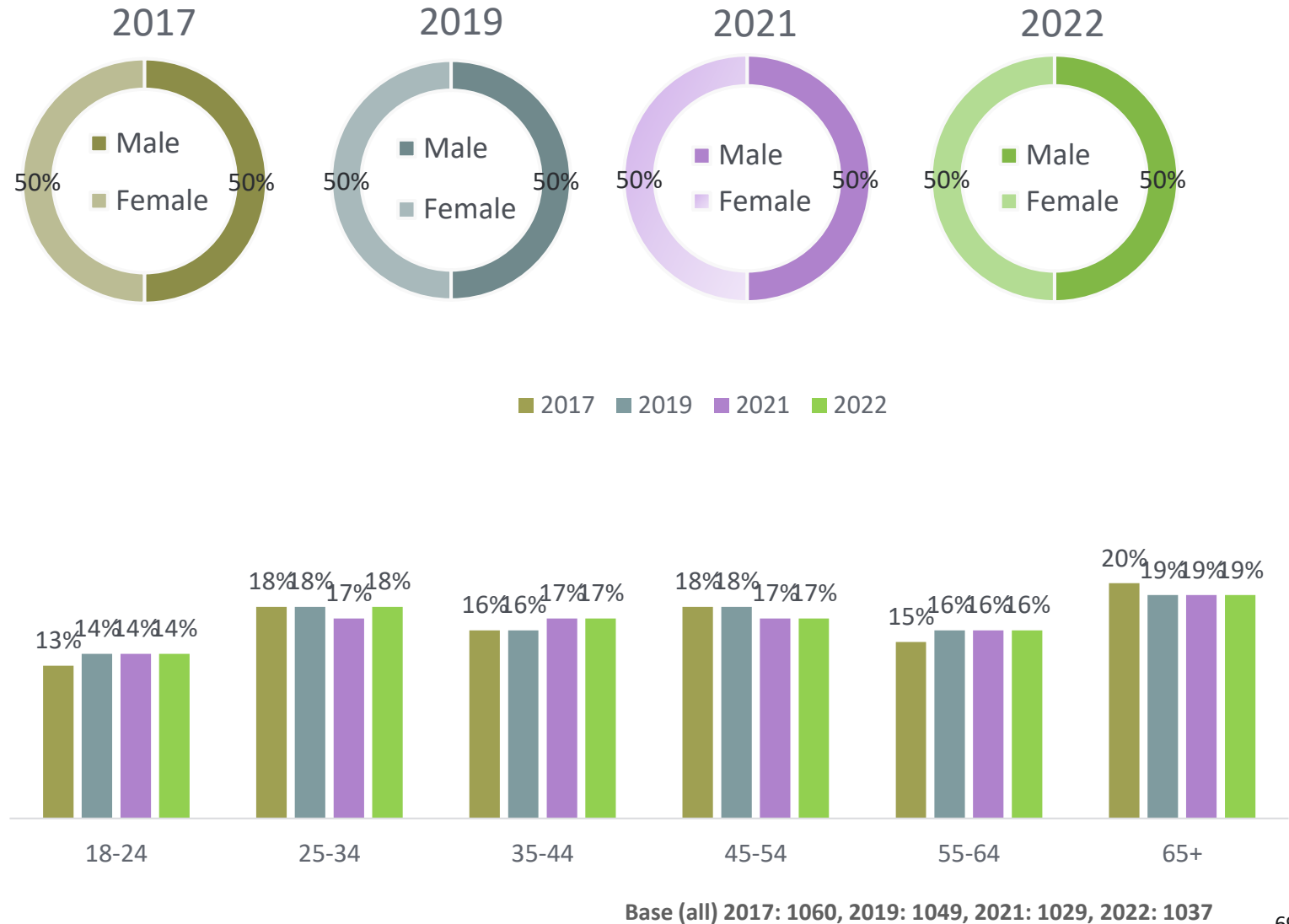
Age and gender

- Quotas were set on age and gender to broadly reflect national Scottish statistics.
- The sample was evenly split between men and women for all 4 waves of research.
- A representative spread of age groups was also included in the sample at each wave of research – around one in five (19%) respondents were over the age of 64.

Note: men/males include trans men and women/females include trans women.



Age and gender



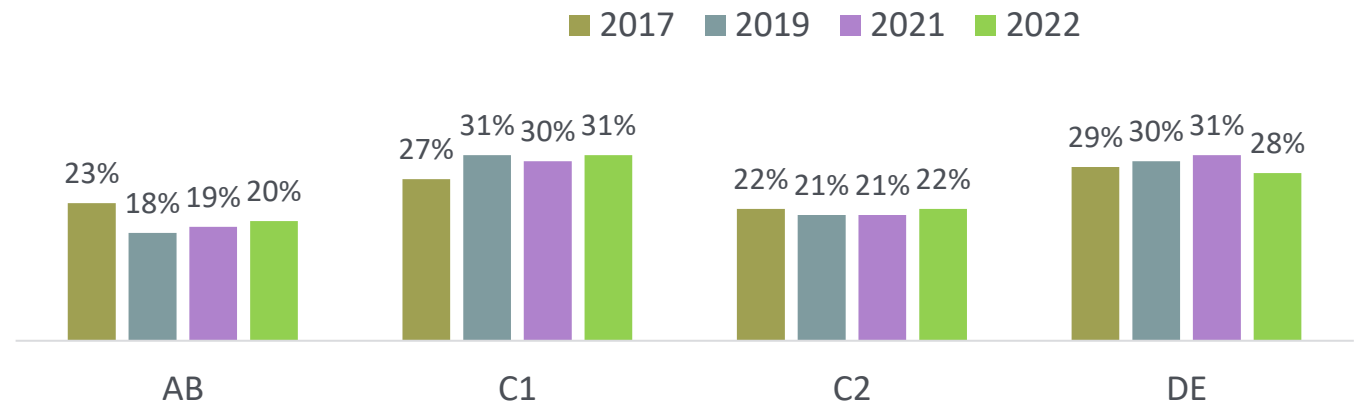
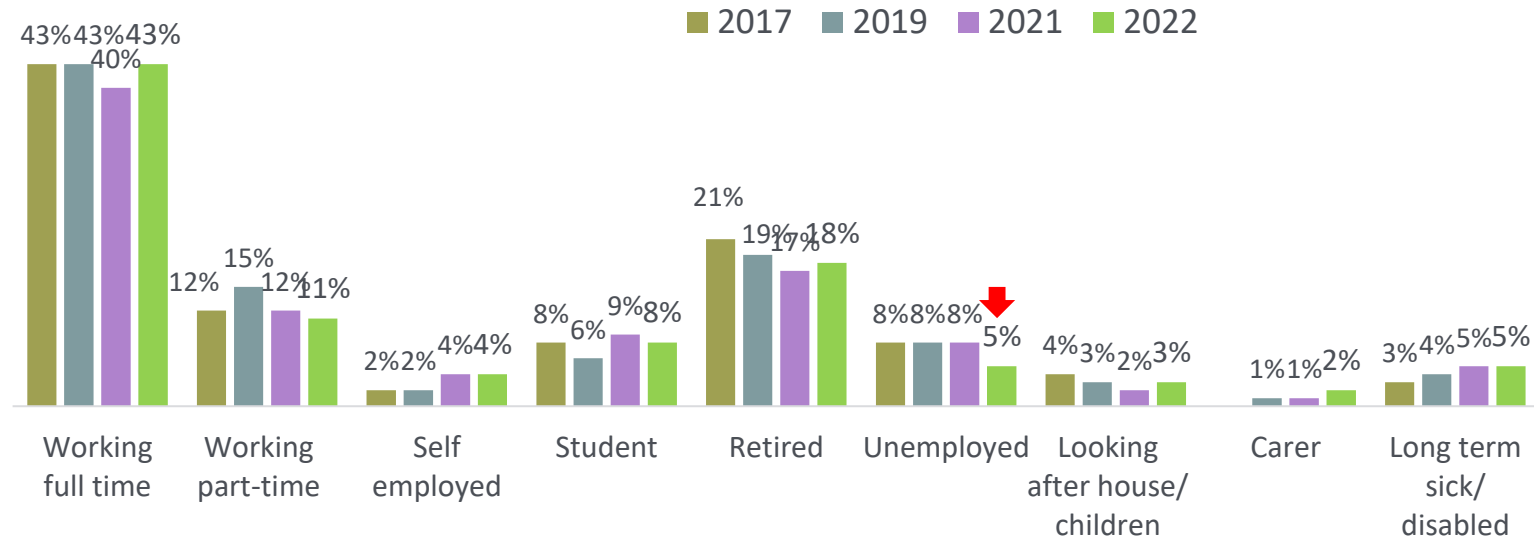
Sample profile

Socio-economic

- Quotas were also set on socio-economic group – 50% ABC1; 50% C2DE.
- The 2022 sample's socio-economic profile was very closely aligned to 2021. All 4 samples were broadly representative of Scottish population statistics (AB 19%, C1 31%, C2 24%, DE 26%), with 2022 slightly more in line with the population than 2021.
- Working status was left to natural fall out – again, this is broadly consistent with national statistics.
- The working status profile was broadly similar across the 4 waves of the tracker, but the 2022 sample had fewer unemployed people (5%) than in all previous waves (8%).



Working status and SEG



Base (all) 2017: 1060, 2019: 1049, 2021: 1029, 2022: 1037

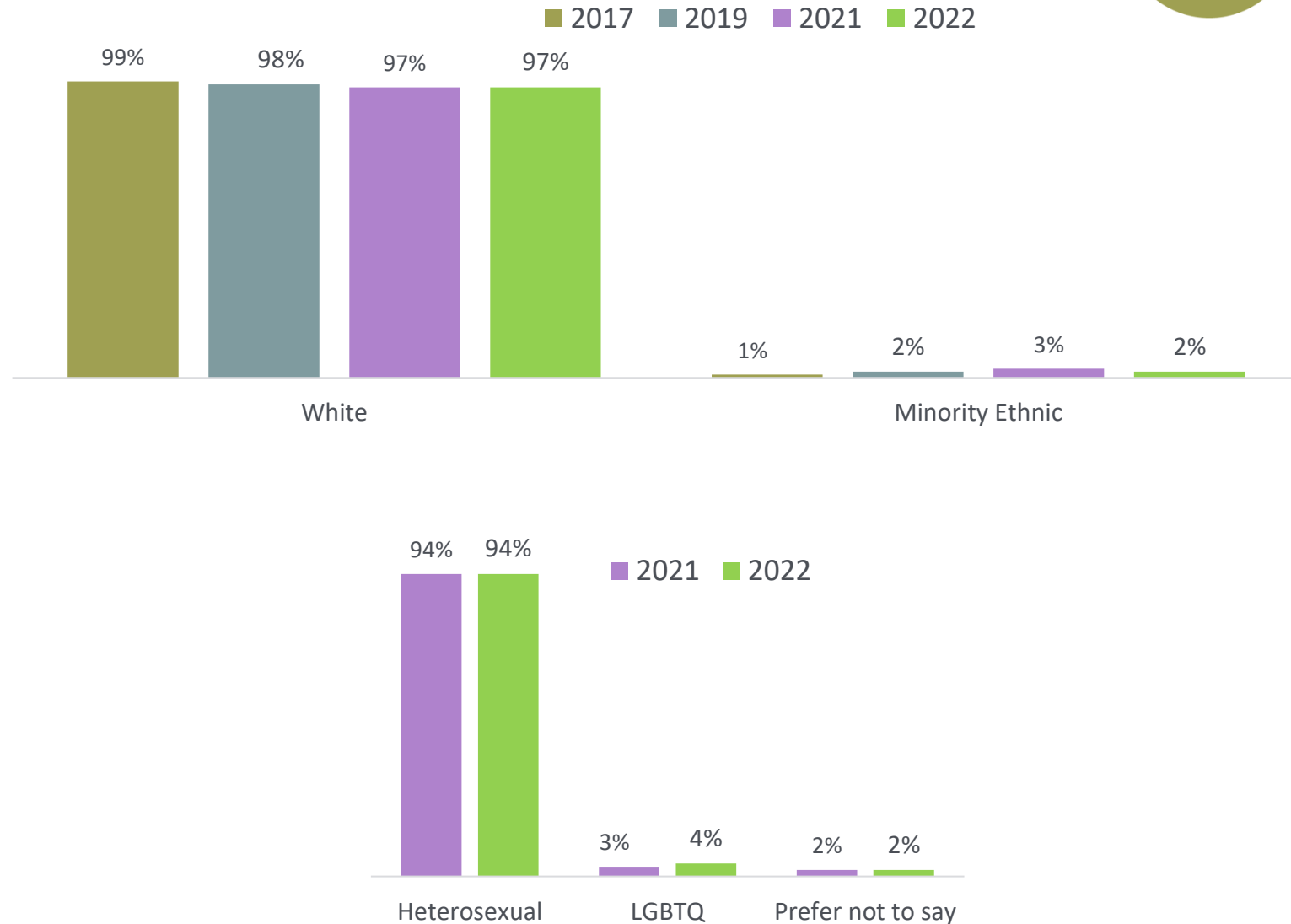
Sample profile

Minority groups

- Three percent of the 2022 sample were minority ethnic (e.g., Black, Asian). This is slightly lower than the population average of 4%.*
- In 2022, 4% of respondents were lesbian, gay, bisexual, transgender or queer. This is slightly higher than in 2021, and compared with the population average of 2%.*

*Sources: Scottish Government and Office for National Statistics

Ethnicity and sexual orientation

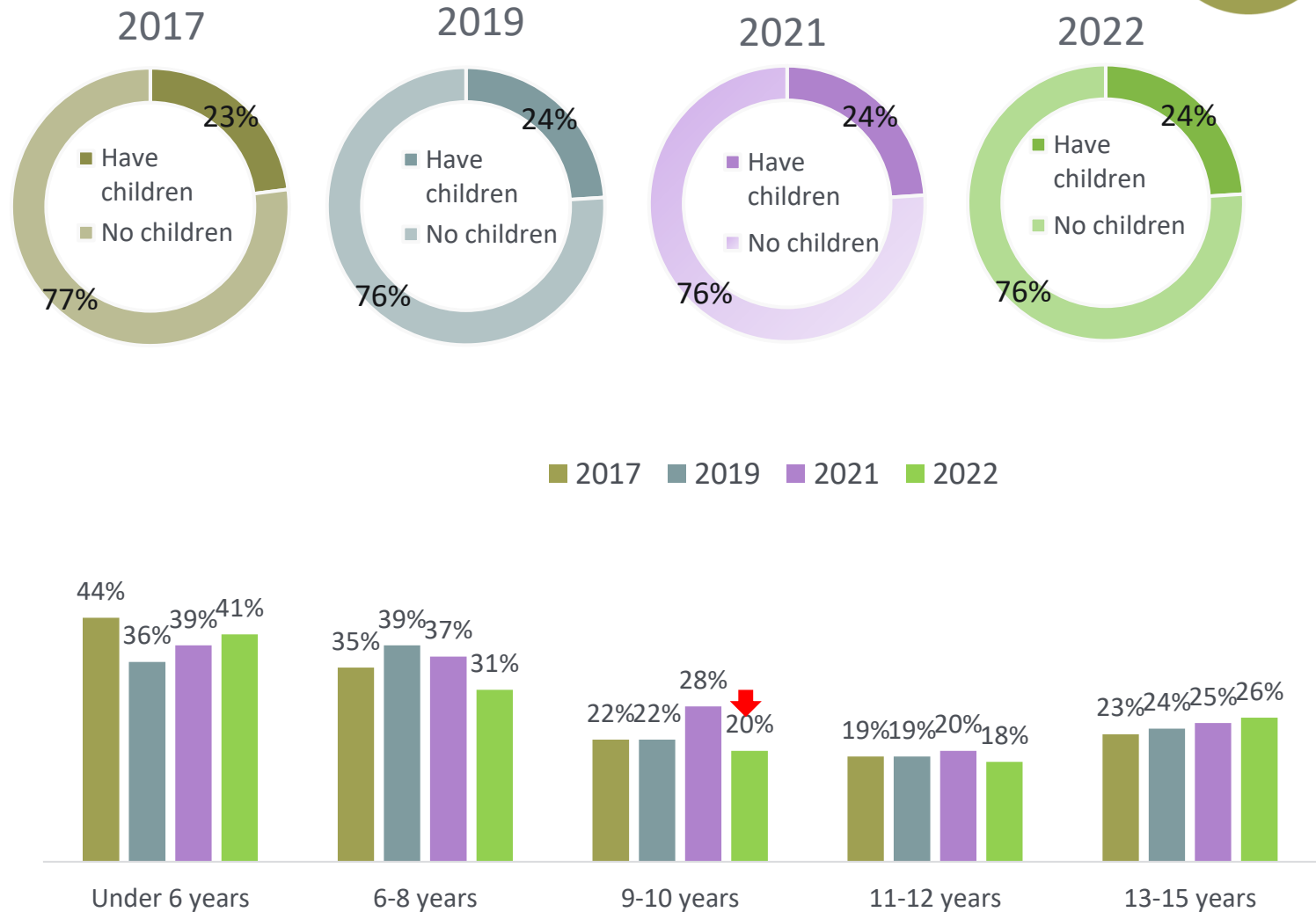


Sample profile

Children

- Around one quarter of respondents in all 4 waves had children under 16 years old in the household.
- There were fewer households with children aged 9-10 in the 2022 sample (20%, compared with 28% in 2021) – this was more in line with earlier waves of the survey.

Children in household



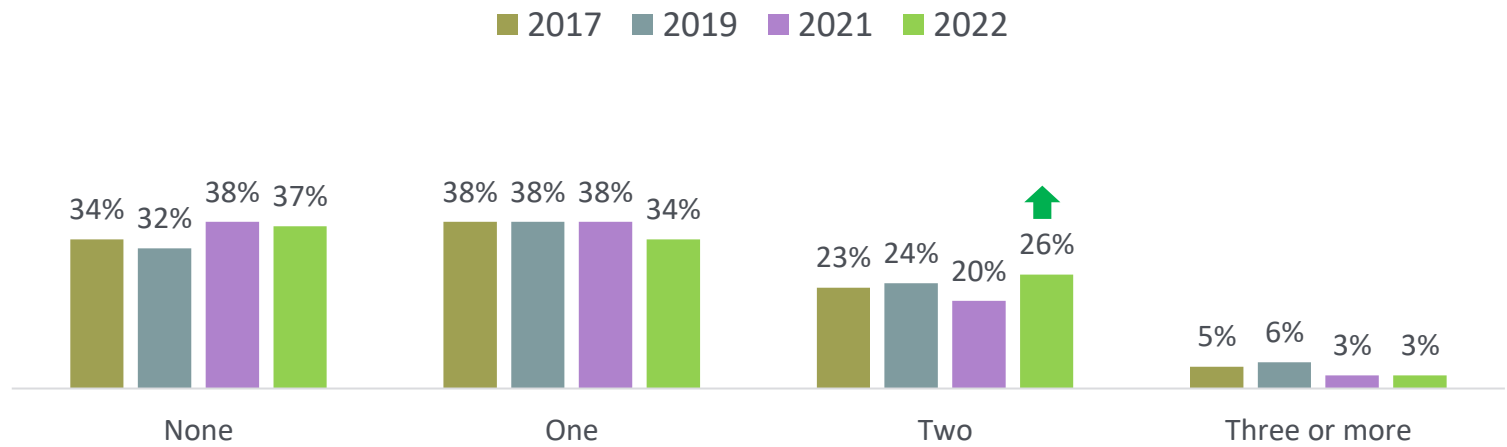
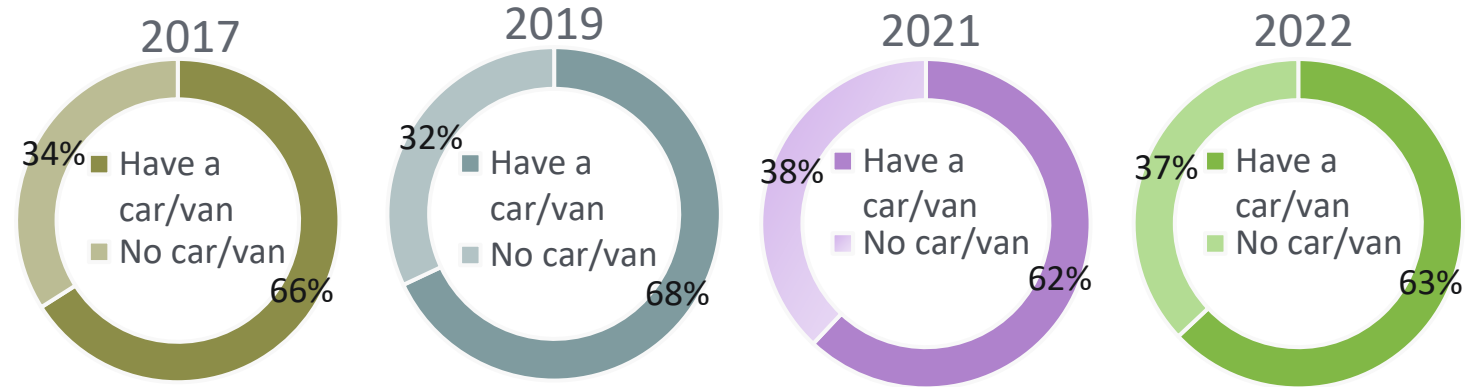
Base (all) 2017: 1060, 2019: 1049, 2021: 1029, 2022: 1037
 Base (all with children) 2017: 248, 2019: 249, 2021: 242, 2022: 245

Sample profile

Car ownership

- Over three fifths (63%) of respondents reported having access to a car or van in the household in 2022 – this is consistent with 2021, although remains lower than in earlier waves of the survey.
- More people had two or more cars in 2022 (29%) than in 2021 (23%).

Cars/vans in household



Base (all) 2017: 1060, 2019: 1049, 2021: 1029, 2022: 1037

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Appendix II

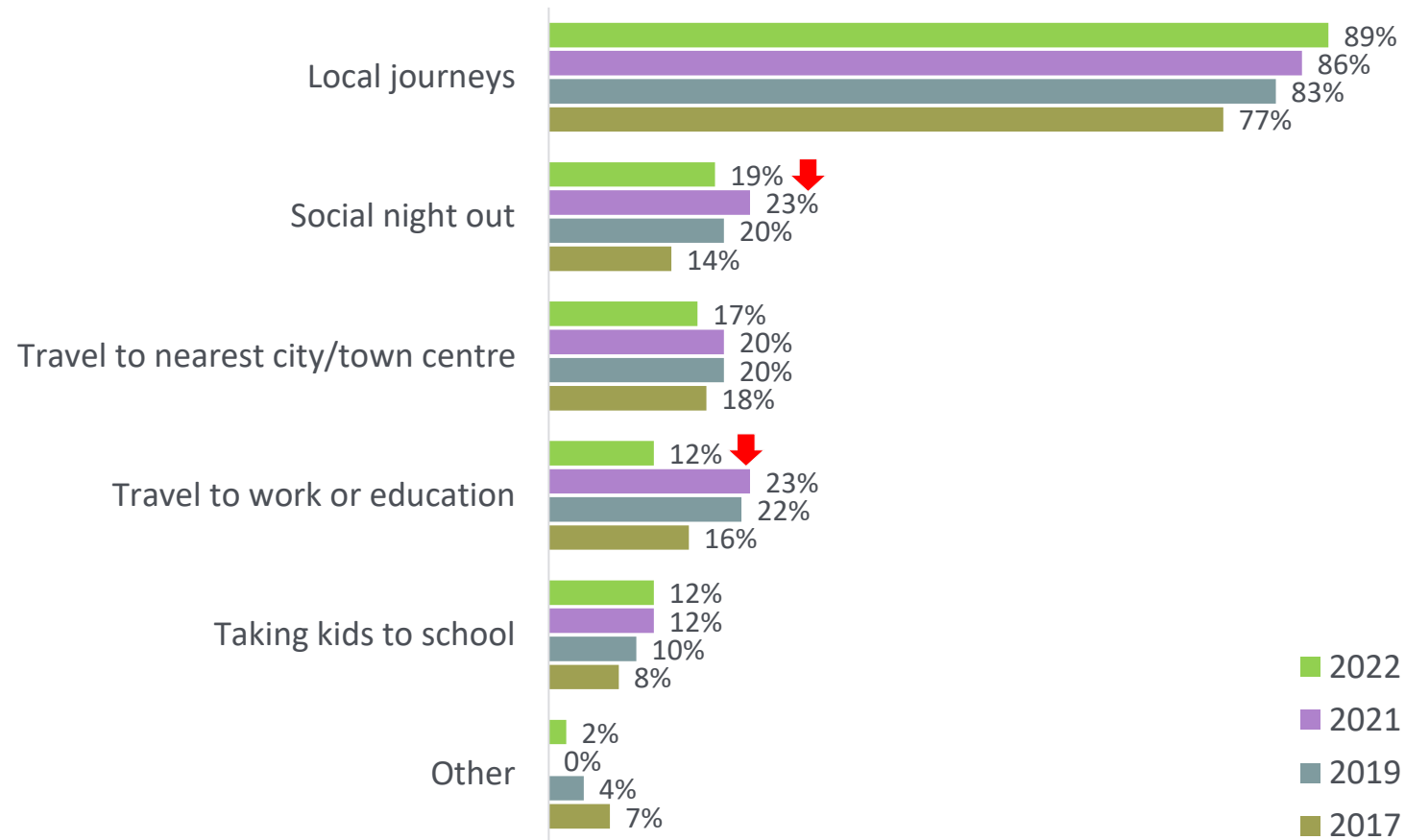
- Frequency of transport: longitudinal data

Transport choices

Journey types



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



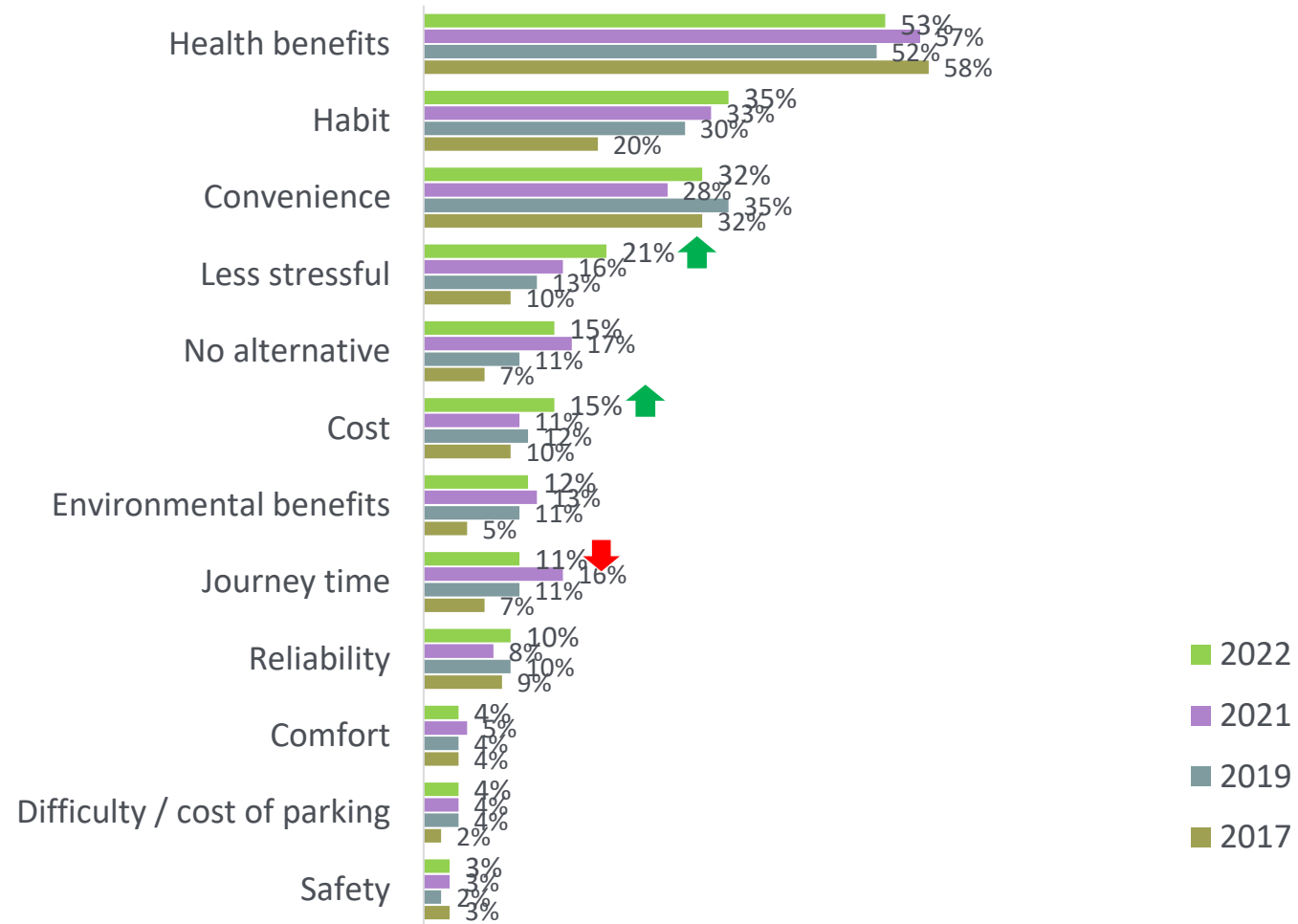
*This chart shows longitudinal data only.

Transport choices

Reasons



Why do you travel this way? – Walking



*This chart shows longitudinal data only.

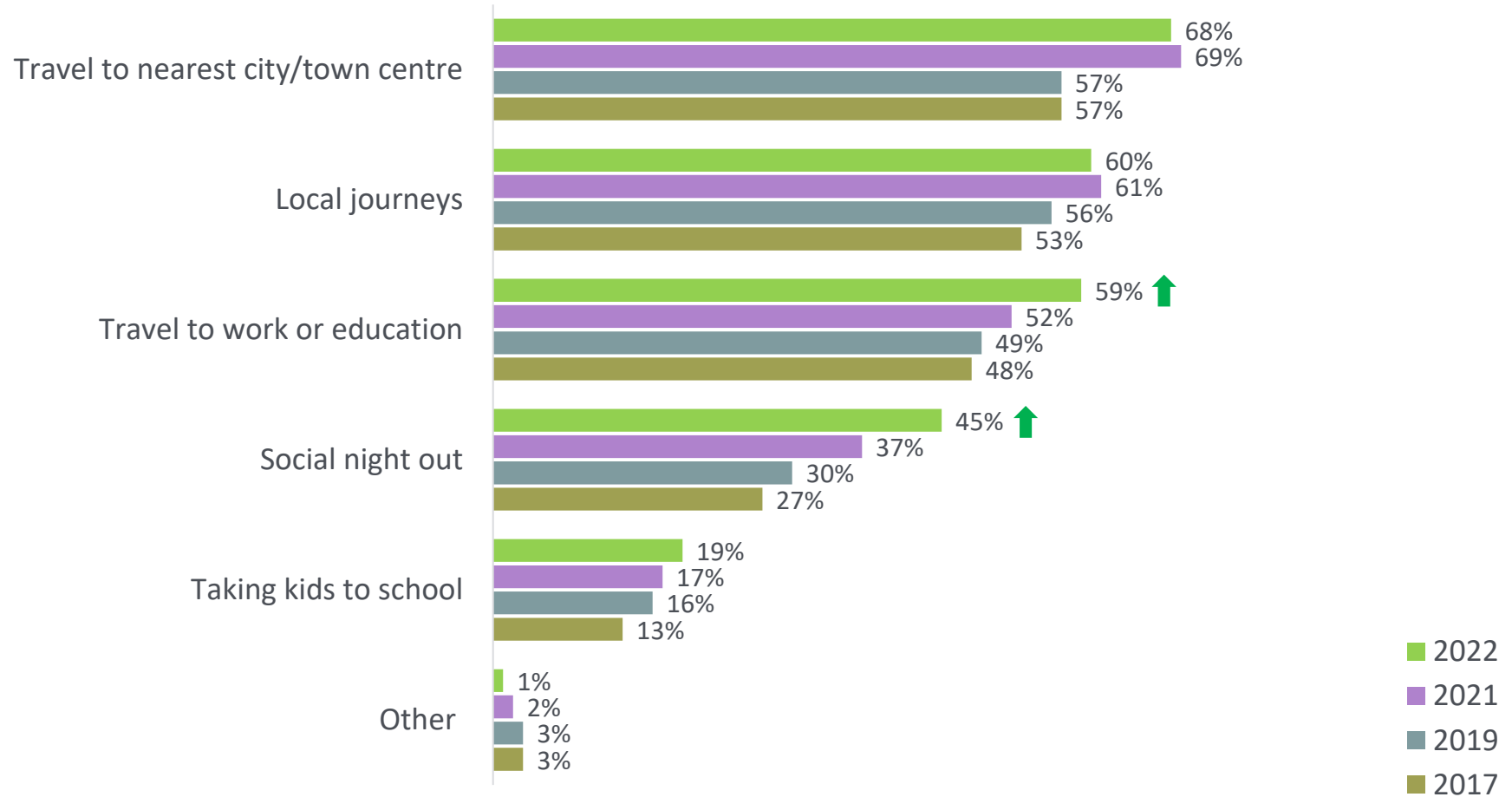
Q2: For each of the means of travel you use, please tell me why you travel this way?

Base (all walking) 2017: 901, 2019: 884, 2021: 805, 2022: 835

Transport choices

Journey types

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



*This chart shows longitudinal data only.

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

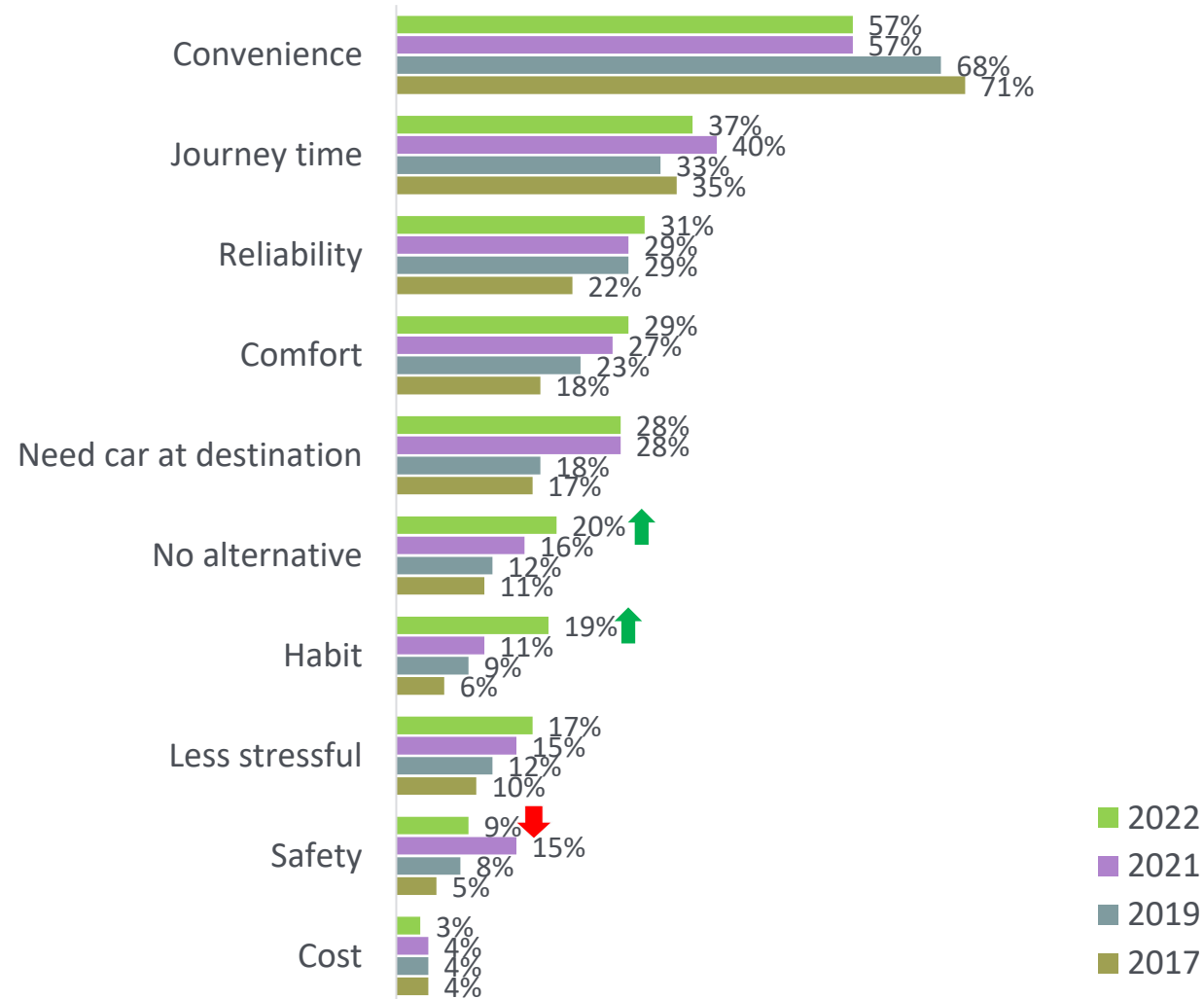
Base (all car/van – including drivers and passenger) 2017: 849, 2019: 861, 2021: 799, 2022: 812

Transport choices

Reasons



Why do you travel this way? – Car / van

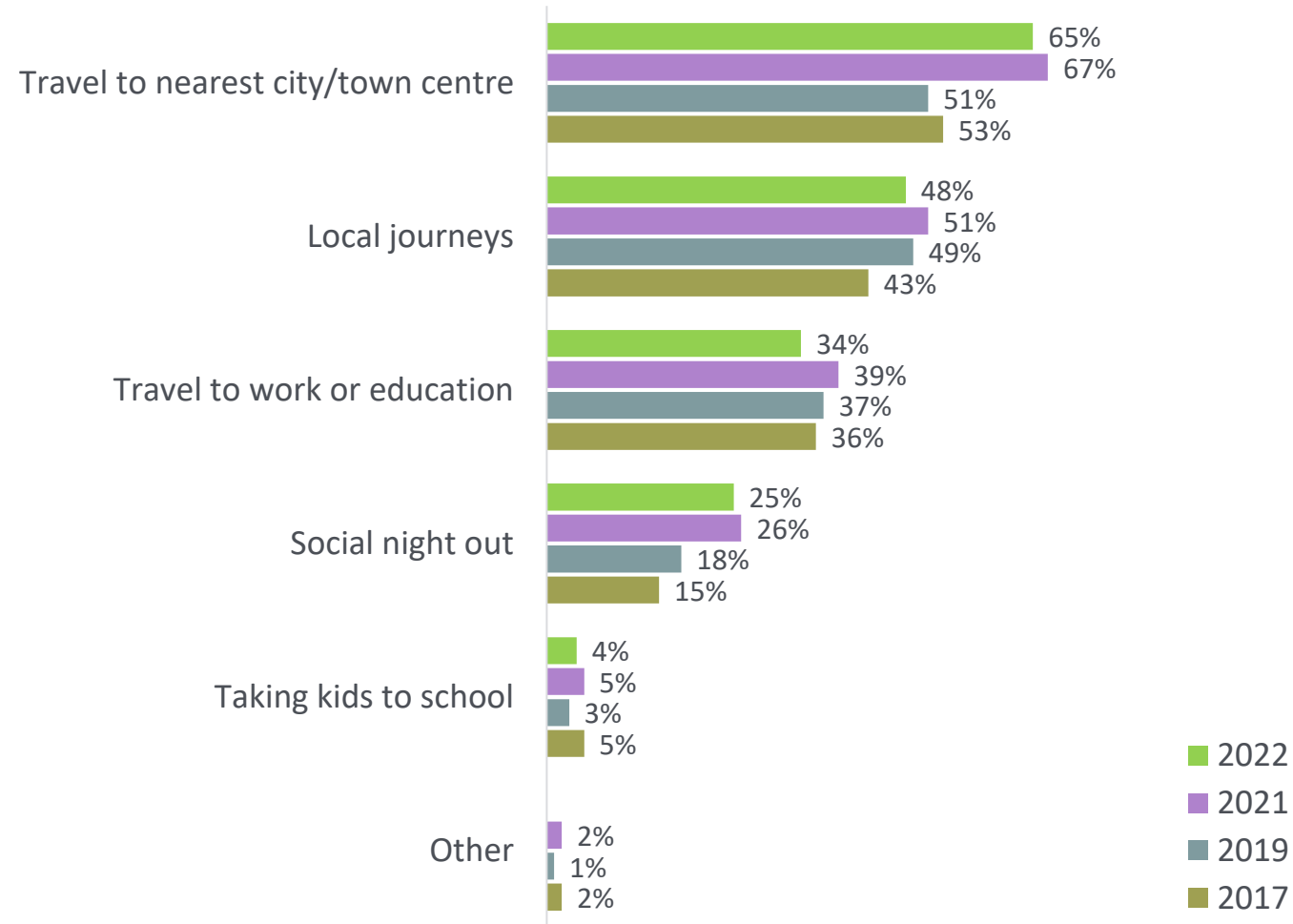


*This chart shows longitudinal data only.

Transport choices

Journey types

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

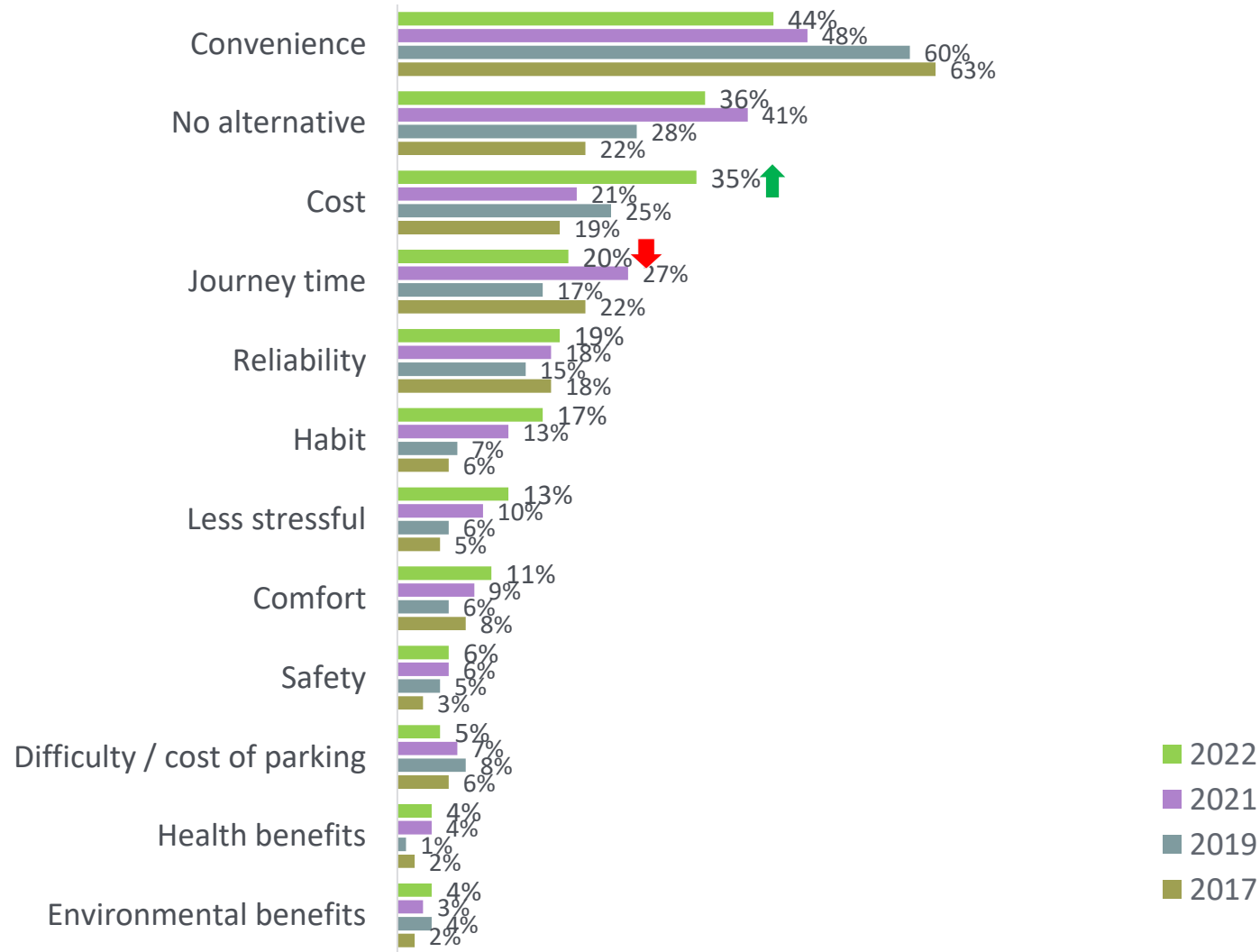


*This chart shows longitudinal data only.

Transport choices

Reasons

Why do you travel this way? – Bus / coach

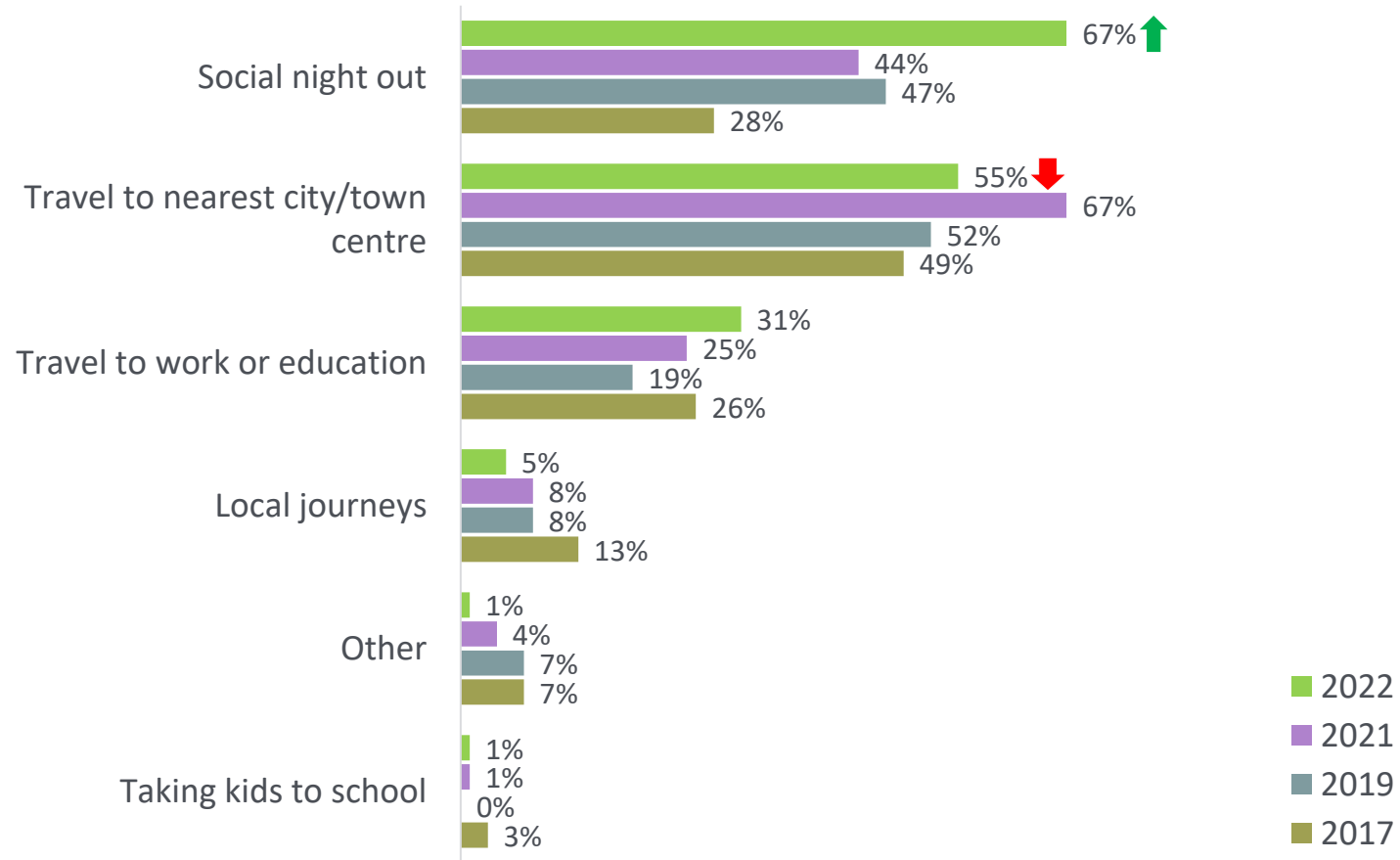


*This chart shows longitudinal data only.

Transport choices

Journey types

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



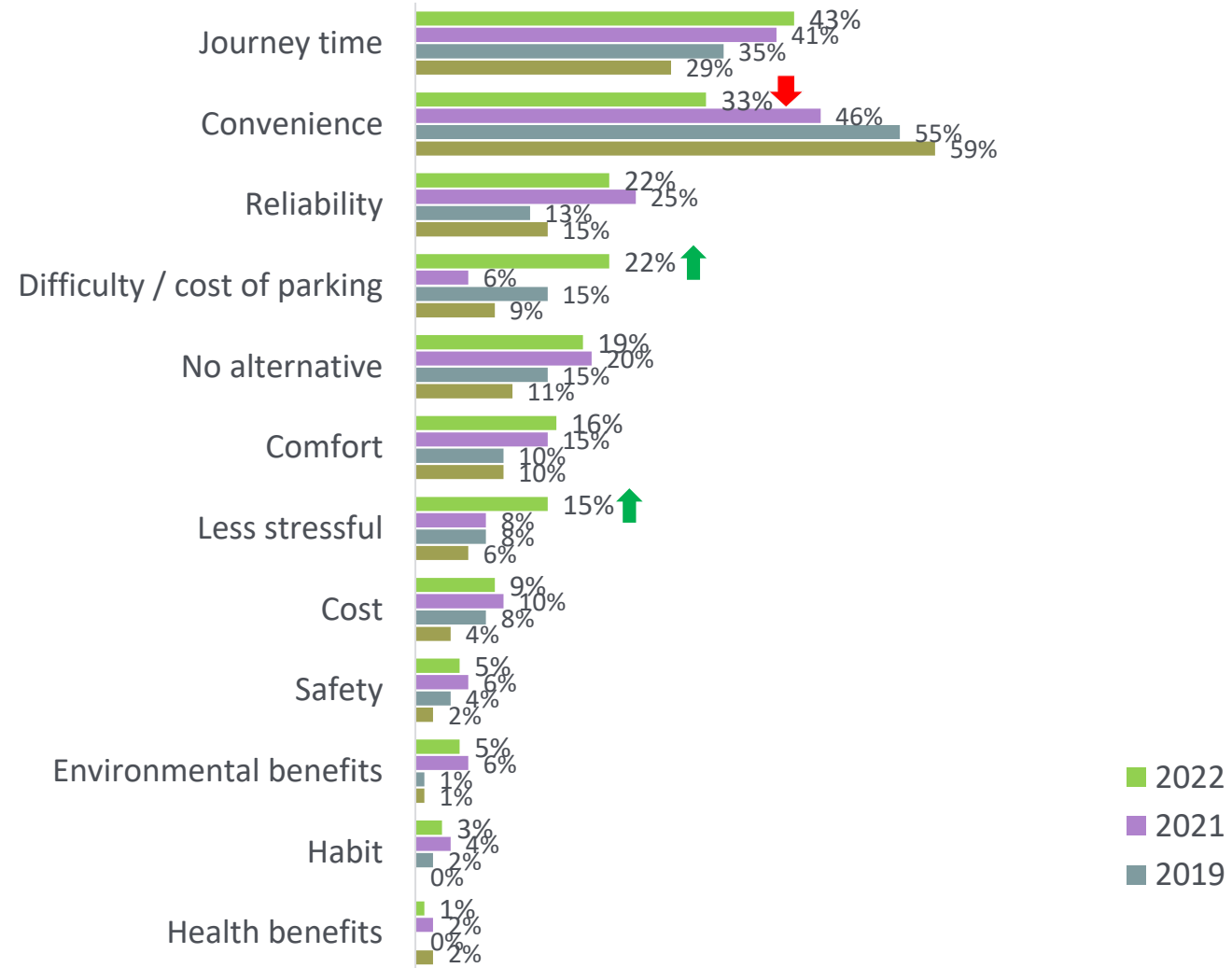
*This chart shows longitudinal data only.

Transport choices

Reasons



Why do you travel this way? – Train



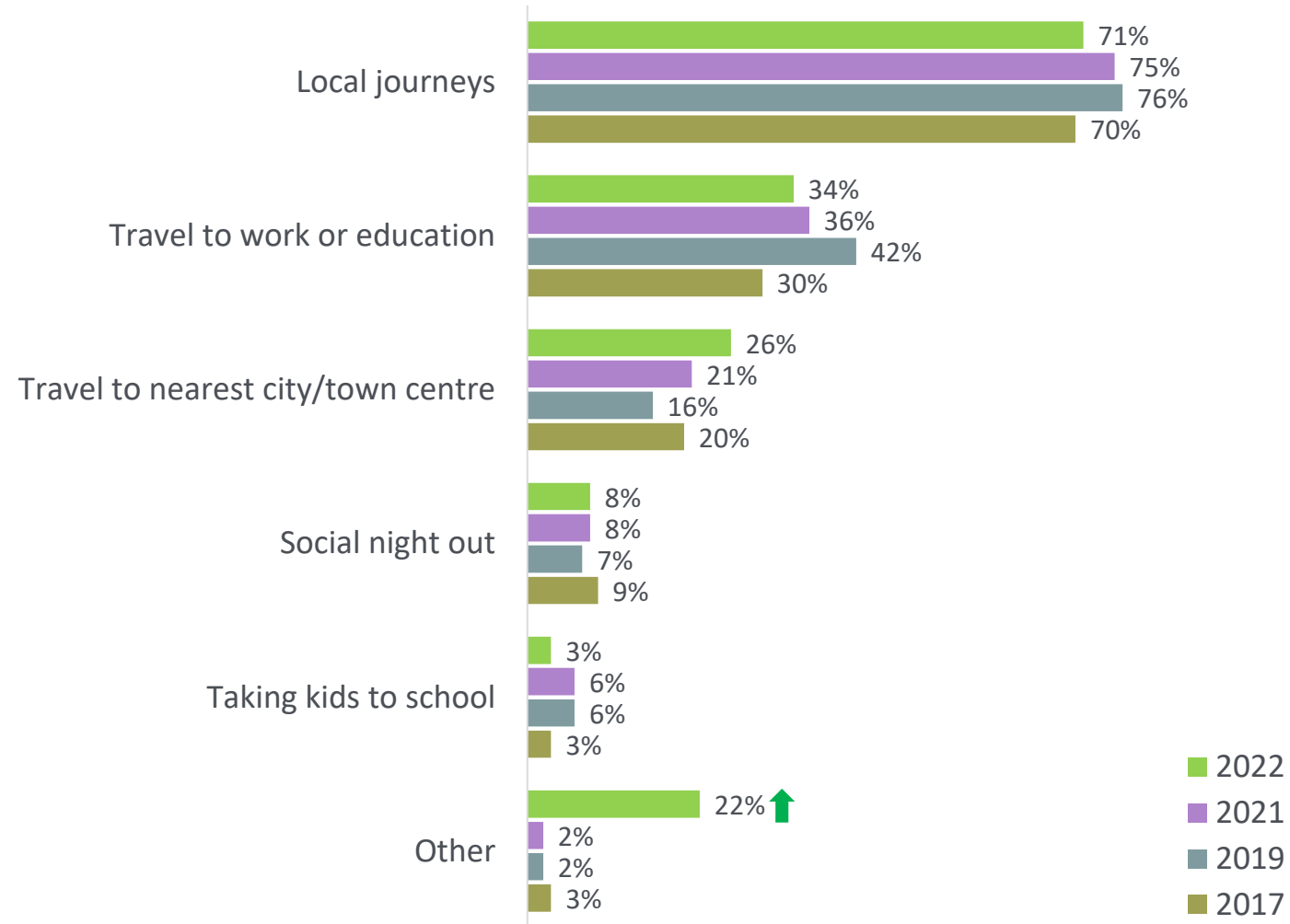
*This chart shows longitudinal data only.

Transport choices

Journey types



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

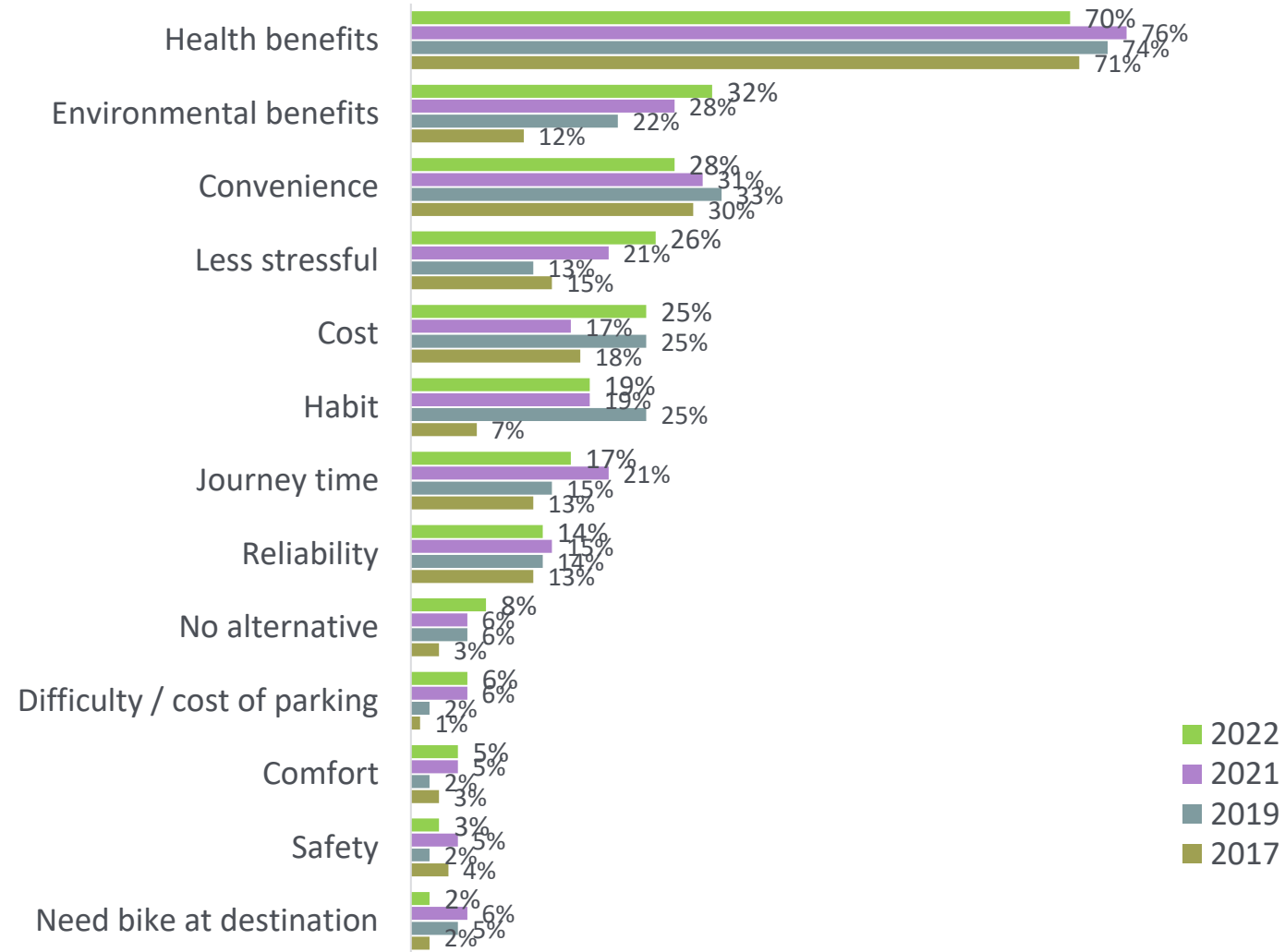


*This chart shows longitudinal data only.

Transport choices

Reasons

Why do you travel this way? – Bike



*This chart shows longitudinal data only.

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

Base (all bicycle) 2017: 137, 2019: 130, 2021: 170, 2022: 187

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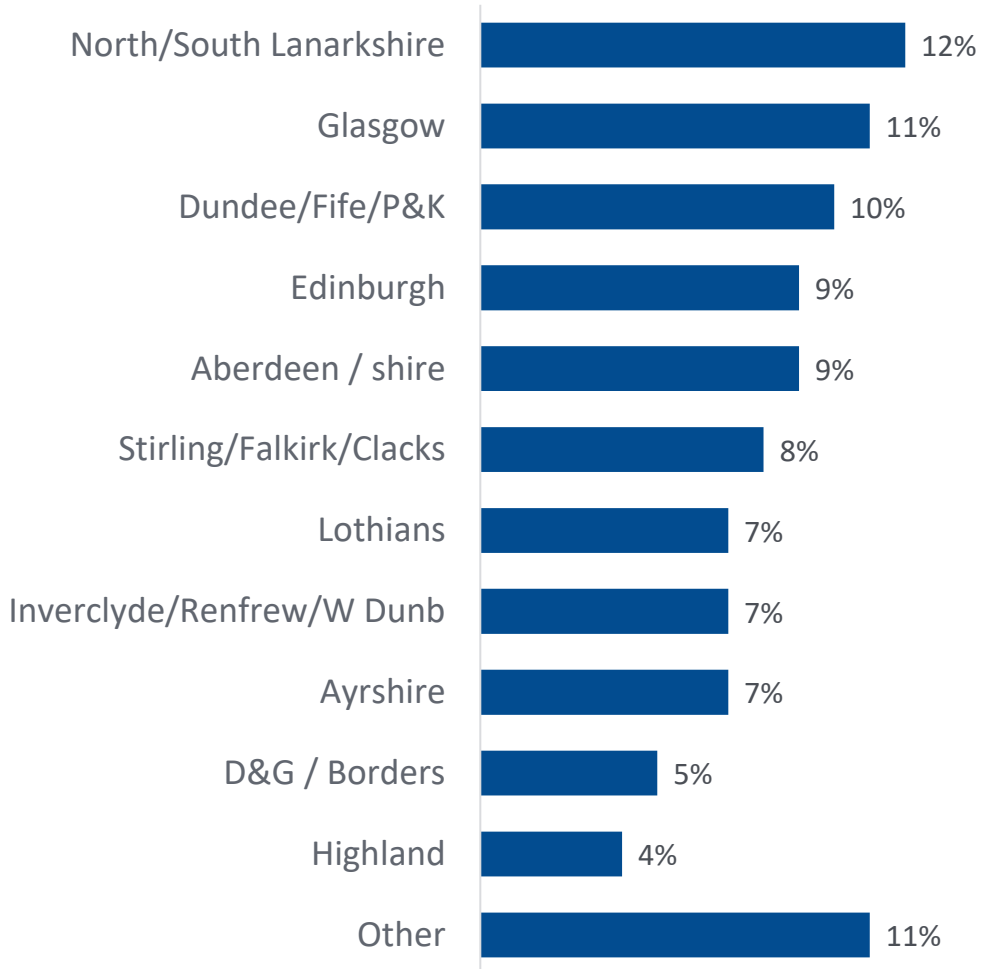
Appendix III

- Scotland population statistics

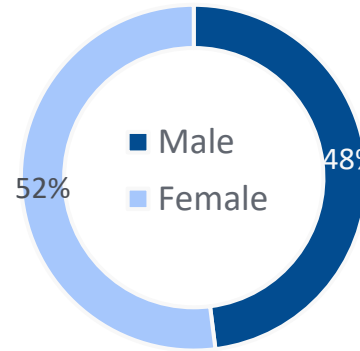
The sampling plan for each wave of research was based on Scotland statistics for region, gender, age and socio-economic groups - the Scotland profile is shown below



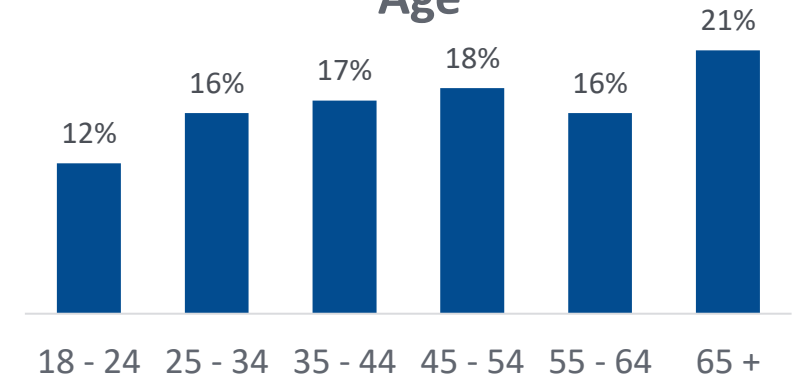
Region



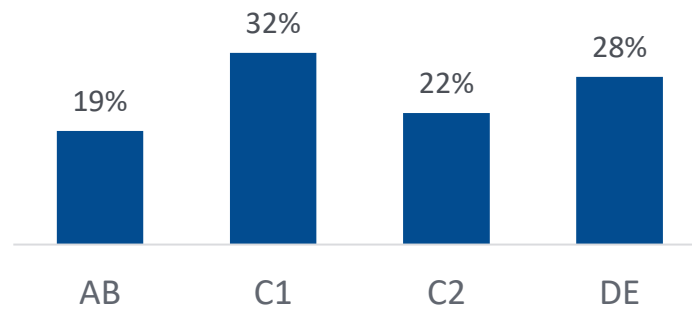
Gender



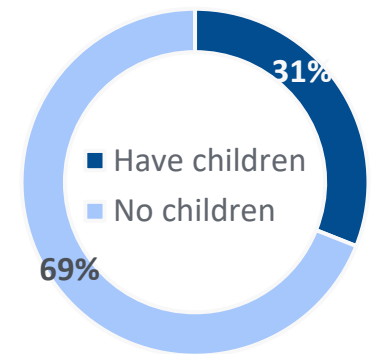
Age



Socio-economic Group



Dependant children in household



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Appendix IV

– 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, 1029 in 2021, 1037 in 2022.
- Fieldwork dates:
 - 2017 – 28th August to 19th September 2017
 - 2019 – 26th August to 22nd September 2019
 - 2021 – 25th August to 24th September 2021
 - 2022 – 19th September to 13th October 2022
- 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, 16 in 2021, and 21 in 2022.
- 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 1,037 provides a dataset with an approximate margin of error of between $\pm 0.61\%$ and $\pm 3.04\%$, 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.