

01 Understanding the Potential Cycling Market

Key Principle

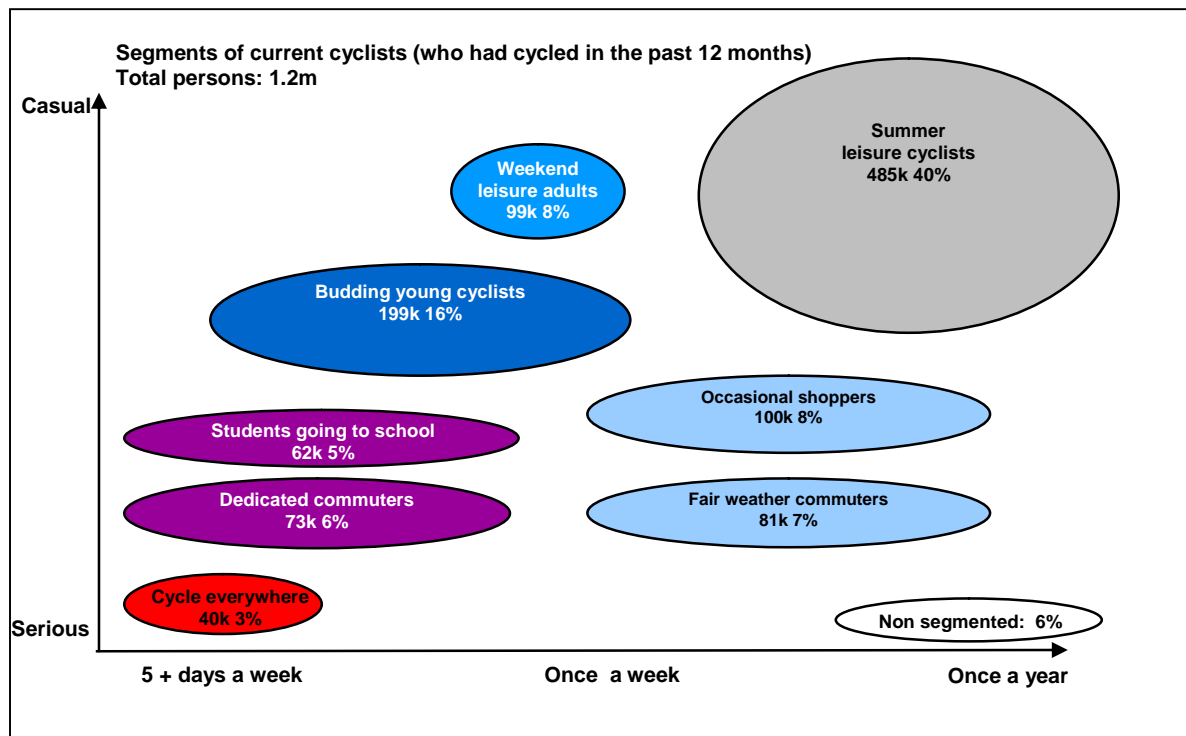
In designing smart interventions with schools, workplaces, colleges and households, it is useful to keep in mind what type of person (or people) you are seeking to influence. Identifying groups with common attitudes to cycling or experience of cycling can help to focus on the key initiatives and messages that they most need, and avoid squandering resources on populations that are resistant or not interested in cycling. This approach is known as 'segmentation'.

Understanding the different segments of the cycling market

Various efforts have been made to understand which types of people might be most receptive to the idea of cycling more often, and what messages and support are most relevant and helpful to them. One of the most useful analyses has been carried out by Transport for London, as part of an investigation of the cycling market in London. It is likely that these findings would be mirrored in other English towns and cities.

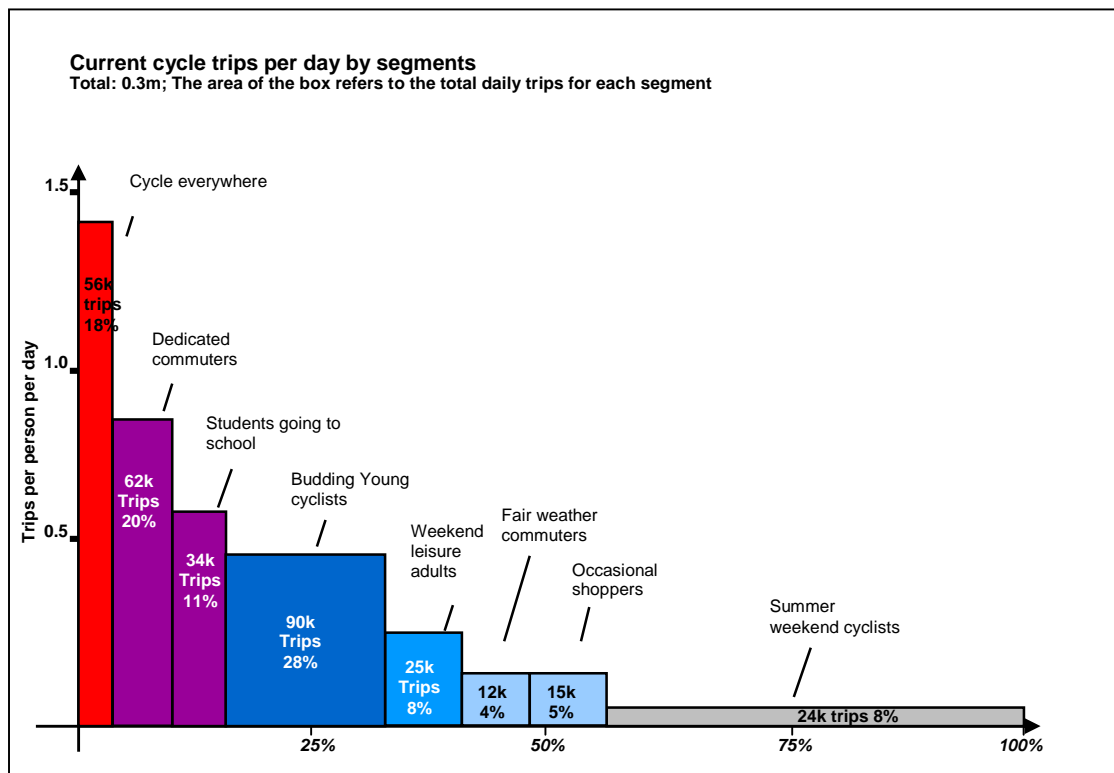
TfL divides the cycling market into eight segments, characterised by cycling frequency and trip purpose. Of the 1.2 million people in London who cycled in the last 12 months, more than half only cycle occasionally. These are the 'Summer leisure cyclists' (by far the largest group); 'Weekend leisure adults'; 'Occasional shoppers'; and 'Fair weather commuters'. The graph below illustrates these different groups.

Analysis of trip frequency amongst cyclists in London



Source: Policy Unit, Transport for London

Analysis of cycle trips in London according to type of cyclist



Source: Policy Unit, Transport for London

Transport for London found that a minority (30%) of cyclists accounted for nearly eight out of ten cycling trips.

People who cycle a lot (those in the 'Cycle everywhere' and 'Dedicated commuter' segments) were responsible for 38% of trips. Children and young people ('Students going to school' and 'Budding young cyclists') were responsible for another 39% of trips. For these people, there may be relatively little potential to cycle more, as they are already cycle for many of their trips. Interventions to keep them 'loyal' to cycling may be worthwhile, but this is more likely to be about making sure the existing cycle infrastructure is good, since they do not need persuasion to cycle (they are already doing it) and are unlikely to need information about cycling (they already know).

People who cycle occasionally represent the most interesting target for smart interventions. These people – roughly 70% of cyclists – account for only 25% of trips. They cycle for leisure, during the summer or at weekends, or occasionally use their bike to cycle to the shops or, on a sunny day, to work. In London, TfL's analysis suggests there are about 765,000 people who fit this description. This is roughly one-tenth of London's population. These groups are to some extent already positively disposed towards the idea of cycling. But they may need encouragement to try cycling for new trips (to work or college) – for example through publicity and marketing which emphasises the benefits to them (saving money, feeling fit, looking good). Since they may not know a safe route, they are likely to find information, maps and signing helpful. The offer of cycle training might be attractive if they are not confident about cycling on more busy roads. An incentive to cycle more might spur them to try cycling for a new trip.

Finally, TfL's analysis suggests 85% of Londoners do not cycle at all. It may be difficult to persuade these people to cycle – they may never have learned to ride, or not own a working bike, or have a negative perception about cycling. The types of interventions which are most relevant to them include cycle loan schemes (based in community centres or libraries, or workplace bike pools); cycle training (especially school-based schemes such as family bike clubs which draw parents into cycling through their children); programmes of leisure cycle rides aimed at families and beginners; and publicity and advertising which encourage people to consider cycling as an option.