

# RESEARCH SUMMARY

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| <b>Title</b>       | <b>Motivating the near market about cycling</b>  |
| <b>Objective</b>   | Barriers and motivators for cycling amongst the near market and reactions to propositions and interventions  |
| <b>Date</b>        | <b>February 2009</b>   |
| <b>Methodology</b> | 10 x qualitative group discussions with a range of Londoners who are possibly or definitely considering cycling in the next 12 months, including a mix London boroughs, life stages, men/women and ethnicity |

## Key findings:

- Cycling considerers are a more complex market than anticipated and there are various tiers of considerers (with different mindsets and motivations) according to how close they are to the cycling 'tipping point'
- There are fewer people than anticipated near the actual tipping point. While all considerers understand the benefits to them, 'apathy' and the continued existence of strong barriers means the majority are not willing to do anything about it
- The benefits of cycling are quite simplistic and generic across considerers. The barriers to cycling, in contrast, are complex and multifarious and vary largely according to life stage and consideration phase. Fear and vulnerability (taking away the protective bubble of the car or public transport), lack of confidence and lack of identification with cyclist are the most deep-rooted and emotional barriers, which will be harder to overcome
- Different communication propositions and initiatives work with different audiences to move considerers up the consideration tiers
  - However, of those tested 'What's Stopping You' is the strongest proposition as it combines the problem and insight with a solution in an empathetic way. The tone is inclusive and implicitly addresses key barriers of lack of confidence, feeling alone and lack of infrastructure
- Any messages would greatly benefit from simultaneous support from the initiatives, in order to provide support for cycling as 'normal'/mass behaviour
- The most motivating initiatives are Cycle Hire and Greenways (as evidence of cycling as a mainstream movement and of London having a cycling infrastructure), the Website, Cycle Guides and Offers (working well at planning stage), Cycle Training (appreciated esp. by females as addressing numerous barriers, but it is debatable how many would take it up)

**Job number:** 08072

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