

COVID-19 Impact on Cycling & Current Trends

Key Findings – Participation Levels:



1. British Cycling's independent market tracker (which collected data just prior to the COVID-19 lockdown) showed a significant rise in core cyclists which appeared to be driven by mass market cyclists participating more regularly..
2. Sport England's weekly tracker showed 8% of the population were cycling in the first week of data collection as part of their daily activity. This has showed an uplift in cycling week on week, peaking at 16% of the population in week 7. There have been significant uplifts from week 1 in all demographics, which showed 15% of UK respondents cycling more frequently for leisure, for work (10%) and for other essential journeys such as helping the vulnerable (9%) since the start of lockdown measures.
3. Our own data shows a slow decline over the last 3 years in over 55s cycling, so with the positive sign that cycling in this demographic has increased week on week (until week 8) during the pandemic there is the potential to begin to reverse this trend.
4. Sport England's data shows an uplift in those cycling for any travel/utility reasons. Most strongly the uplifts are seen in those cycling for personal business or as part of their work. Data shows those cycling more seem eager to keep up these habits even after lockdown ends, with:
 - 83% stating they'll continue to cycle more for leisure
 - 77% will continue to cycle for essential journeys
 - 69% will continue to cycle for work

Key Findings – Changes in Barriers and Motivations:



1. Research shows that quiet roads (48%) are most likely to encourage someone to cycle more after lockdown, closely followed by less vehicle traffic (42%) and more cycle lanes (39%)
2. Not having their own bike is the top barrier preventing Brits from cycling more during lockdown (29%) followed by worries about safety on the roads (23%)
3. Previous British Cycling research showed that people were reluctant to see cycling as part of their lifestyles. Through COVID-19, cycling has become a fit in people's lives to help with a number of different scenarios:
 - People are using the bike to escape, whether that's from the house, to find some routine or a sense of normality.
 - They're also using it for health and fitness reasons, for their mental health, weight management and exercise.
 - Some ride because they are allowed to,
 - Some to escape family, others to ride with family.
 - Some miss their previous cycling commute,
 - Some see it as a way to boost their immune system against COVID-19.
 - It's seen as an alternative to other non-permitted forms of exercise.
 - A change in working patterns and working from home has also led to a shift in people believing they have more time to cycle.

Continued...

1. Data also showed:

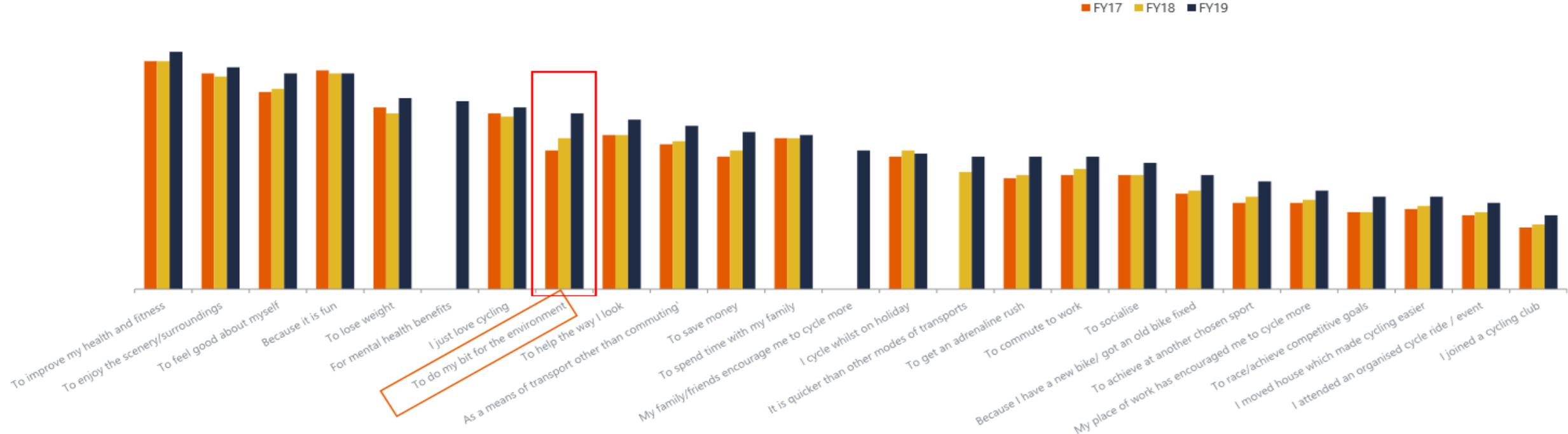
- 63% were cycling for their physical health
- 37% for their mental well being
- 32% to avoid public transport/maintain social distance.

2. Our own members say that:

- Cycling has been good for their mental health during COVID-19 (88%)
- They are doing more cycling than before COVID-19 (50%)
- Their experience on the roads is better (75%)

There has been a general increase in reasons for cycling, in line with an increase in the number and frequency of those cycling. Doing my bit for the environment sees the biggest increase since FY17.

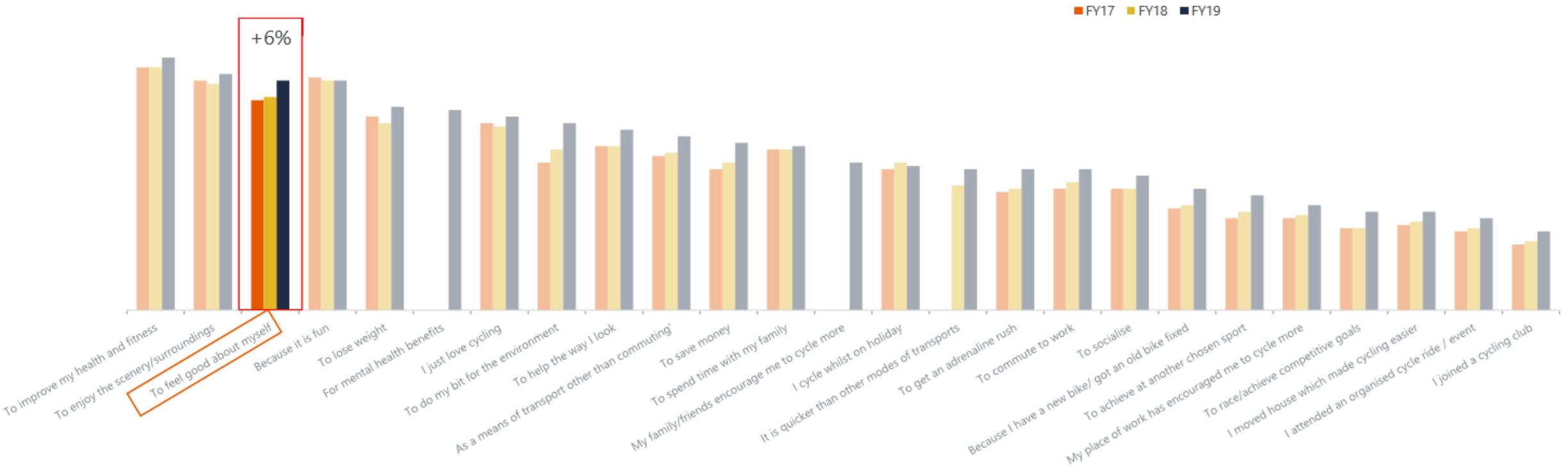
Reasons for cycling, based on UK cyclists (%)



To feel good about myself has also seen an above average rise vs FY17. This remains more of a reason amongst female cyclists than male ones

Reasons for cycling, based on UK cyclists (%)

* figures shown denote change vs FY17



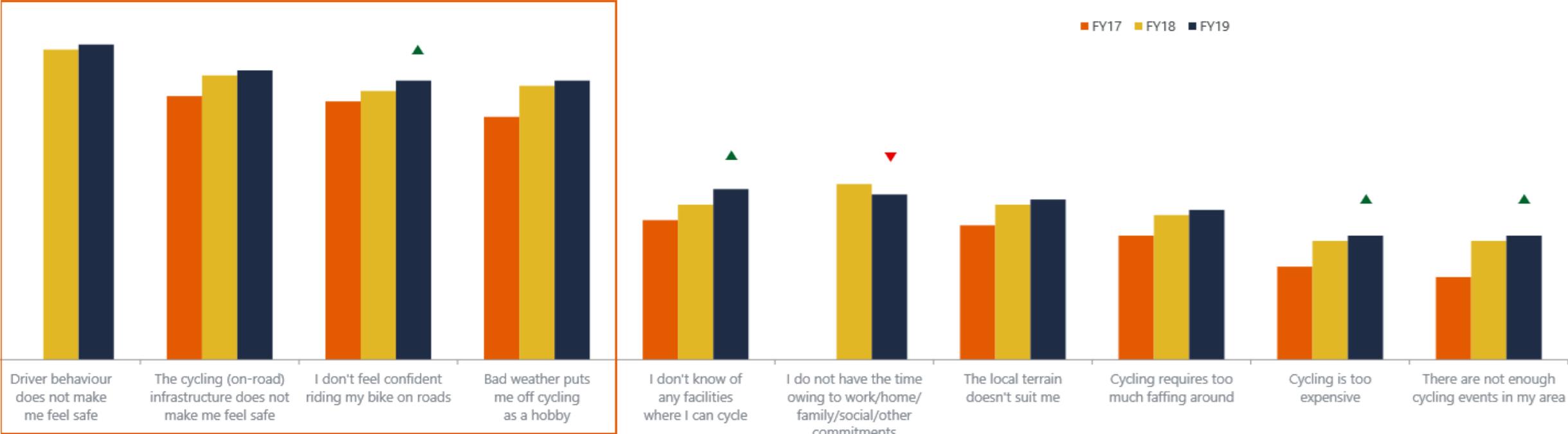
Key Findings – Cycling Post Covid-19:



1. Data showed:
 - 31% of bike owners are more likely to cycle to work post lockdown
 - 23% of those who live within a 4-mile commute are also more likely to get on their bike when returning to work.
2. In terms of life after COVID-19 and lockdown measures, 19% more people say they are likely to use a bike to get to work. When asked what would make workers likely to cycle more frequently after the end of lockdown:
 - Better bike storage facilities (37%)
 - Better facilities at work for showering (36%)
 - Quieter routes for cyclists remains the top motivator (44%).
3. Nearly half (46%) of all respondents agree that cycling is appealing as it helps avoid public transport where there is a higher risk of Covid-19 infection.
4. One in five commuters who normally drive to work said they were more likely to cycle after the lockdown has lifted
5. 18% of public transport commuters said they were more likely to cycle to work.

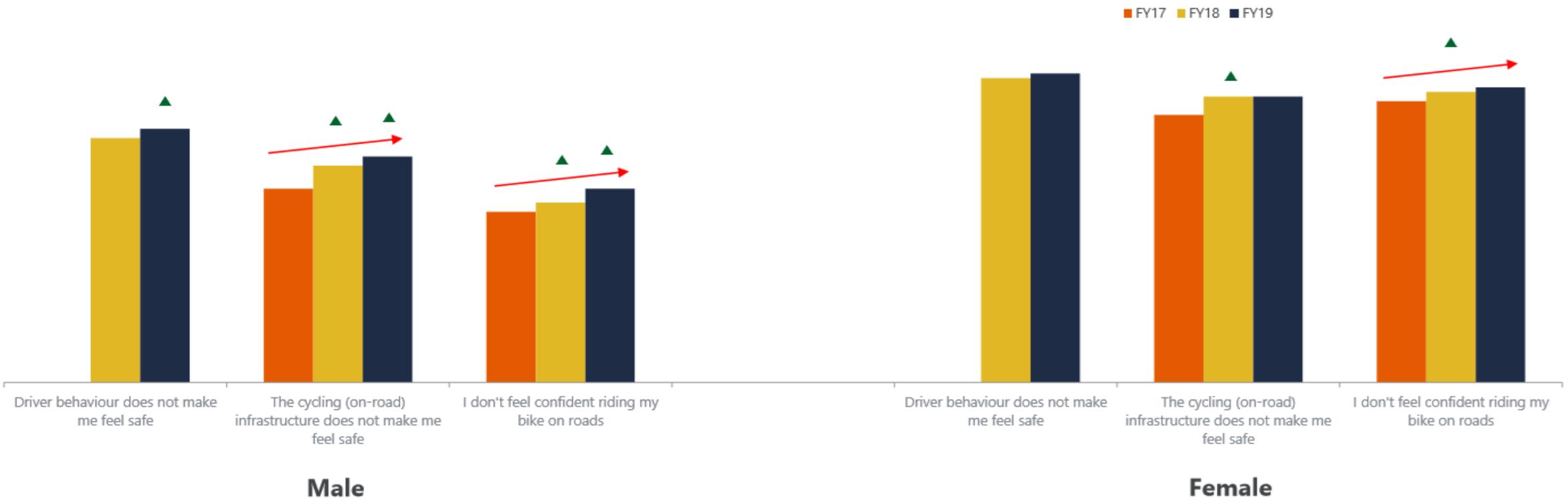
The main barriers continue to point to underlying safety concerns, with lack of confidence rising significantly. All 2019 figures are significantly higher than 2017

Barriers to cycling, based on those who don't cycle as much as they can (%)



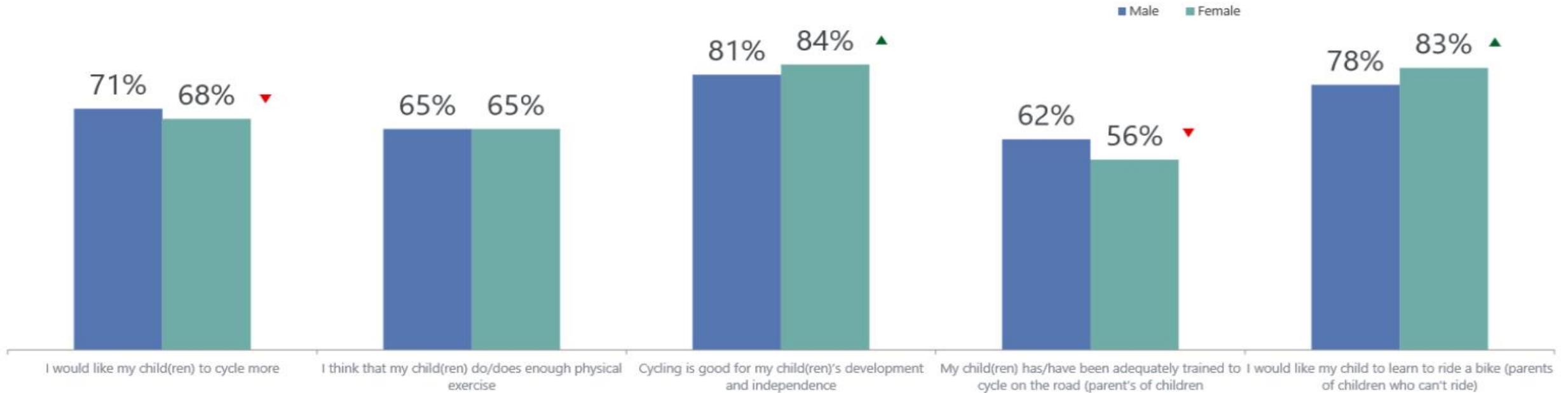
...the key safety barriers are increasing amongst both males and females.
 Tackling safety is key to increasing female participation but also potentially helpful to increase/maintain male participation

Barriers to cycling, based on those who don't cycle as much as they can (%)



Female parents appear to see the benefits of child(ren) cycling (84% agreeing that cycling is good for development and independence) but there appear to be reservations about road safety (56% agreeing their children have adequate road training)

Parental attitudes to child participation in cycling, based on UK parents (%)*



Key Findings – Other Information :



1. Our research shows within our volunteer cohort, 92.9% are likely to return to volunteering with us once the restrictions have ended.
2. When asked about returning to activities Sport England data shows people were most concerned about:
 - Social Distancing, 24%
 - Catching the virus, 11%
 - Concerns about returning to the gym, 8%
 - Returning to swimming, 3%
 - Cleanliness and hygiene, 3%