9th December, 2016

Barriers to Investing in Cycling in England: initial findings from a stakeholder survey

The short report forms part of the Propensity to Cycle Tool project (www.pct.bike) led by Dr. James Woodcock at CEDAR, University of Cambridge, and funded by the Department for Transport (DfT). The 'Barriers to Investing in Cycling' survey was led by Dr. Rachel Aldred assisted by colleagues at Westminster University's Policy Studies Institute (PSI). Dr. Anna Goodman, Dr. Robin Lovelace and Tim Edwards (PSI) advised on survey design; Tom Watson (PSI) carried out stakeholder interviews. This report was written by Dr. Rachel Aldred on behalf of the PCT team.

Although this report forms part of a project commissioned by the DfT, the findings and recommendations are those of the author and do not necessarily represent the views of the DfT.

Executive Summary

413 stakeholders (from a sample of 1,733) filled in an online survey on barriers to investing in cycling. The largest single group of respondents were officers (e.g. for local authorities or local enterprise partnerships), while others included consultants, academics, business stakeholders, and advocates. Respondents were based in, or had experience from, regions across England.

From a list of eight pre-defined barriers, the top three selected were financial/funding problems, followed by lack of political leadership, and lack of support within the transport authority. By contrast, public, media and business opposition were seen as less problematic. Many detailed examples were given of barriers and of attempts made (often unsuccessfully) to overcome them. Car culture/car dominance, within organisations and society at large, was the most common user-defined barrier, with other issues raised including bidding processes.

Respondents were asked about a series of possible enabling factors that could help (or had helped) overcome such barriers, and overwhelmingly choose either ring-fenced, long-term funding for cycling or high-level political support as their top enabler. Views on whether the situation was improving were mixed. Nearly half thought the situation was not changing or getting worse, while around a third thought it was getting easier to invest in cycling. People based in governmental organisations in London were over twice as likely to be optimistic as those based outside London.

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Survey Aims

The Propensity to Cycle Tool (PCT) is an open source, freely available tool that provides an evidence base for cycle planning. As part of the PCT project related reviews and data gathering exercises have been undertaken. These have aimed to support getting the tool into practice.

This short report relates the key findings of a survey of stakeholder views on barriers to investing in cycling, conducted in June-July 2016. The results of this and some accompanying interviews will also feed into a report on Pathways to Achieving the National Ambition, in March 2017.

Cycling investment in England remains limited and cycling networks incomplete, although other work carried out for this project suggests that (a) building high-quality infrastructure separated from motor vehicles is an important part of creating a cycling revolution and (b) such infrastructure can help diversify cycling. Other research supports these findings.

This survey sought to explore barriers to investing in cycling in England, and factors which have helped, or could help, overcome these barriers. It aimed to do this by asking for the views and experiences of people from a range of sectors, organisations, and regions, who have expertise and/or experience about cycle planning in England.

This should prove useful for DfT, local authorities, local enterprise partnerships and other stakeholders, complementing the PCT's identification of potential routes and areas that can be prioritised for investment.

Background

While England and some authorities, towns and/or cities within it have policy ambitions to grow cycling, progress has been mixed. The 2011 Census was disappointing in overall showing little change in cycle commuting rates across the country; albeit comprised of some growth areas and others where cycling had stagnated or declined. Investment in cycling in most of the country continues to lag behind European and some North American comparators, with relatively little high-quality cycle infrastructure in existence.

Therefore, this survey sought to establish the key barriers to investing in cycling, and potential enabling factors that could help address these. As well as asking about specific barriers identified through stakeholder interviews, it allowed respondents to write in their own barriers, and many did so. The survey gathered many specific examples of problems experienced by stakeholders, as well as ways in which these had (or had not) been overcome. Finally, it allows us to compare sectors and participants with interesting results; for example, divergent views held by some groups, and differences related to the areas in which participants have worked.

Survey methods

Sampling

Groups identified as having expertise/experience in the area were as follows:

- Local authority officers, particularly those working for highways authorities
- Local politicians with responsibility for transport and/or an interest in cycling
- Local Enterprise Partnership staff and board members with some responsibility for transport
- Cycle advocates

- Academics/researchers who write on cycling
- Consultants
- Businesses with an interest in cycling (either as a product or promoting it among staff)

None were easy to sample. The simplest were the first three groups, as it was possible (albeit time-consuming) to start with a list of organisations and search websites to establish 1-2 people fitting into the category. For cycling advocates, organised groups exist, but one (Cycling UK) was unwilling to provide a list of local activists and their email details – because the survey was sent using individual links, this meant they could not be included (although some CUK staff or volunteers were included via other lists). The other main nationally organised group with local contacts, CycleNation, provided a list of groups and email addresses.

The final three categories were more challenging. Participants from these organisations were sourced in several ways: (i) academics were identified using a Google Scholar search for work related to cycling policy, and (ii) consultants and businesses (and others, including for example some additional local authority officers) were sourced from lists of attendees at three recent cycling-related conferences that took place in England. While not perfect, this was considered better than sending emails 'cold' to organisations, which would often have meant using generic rather than personal email accounts.

We decided that it would be more effective to contact named individuals rather than organisations, which would also help ensure that the survey was sourcing personal knowledge and experience rather than 'official' organisational perspectives.

Accordingly, respondents were chosen through several different strategies, summarised below. This was somewhat complicated because in most cases (e.g. for consultants working in the field) no obvious list exists that can be used; nor were organisational websites necessarily useful.

Sampling strategy summary

- Searching the internet for at least one, usually two named officers from English local authorities with responsibility for transport or cycling

- Searching the internet for at least one, usually two named politicians from English local authorities with responsibility for transport or cycling

- Searching the internet for at least one, usually two named officers or Board members from English Local Enterprise Partnerships, if possible with indication of some interest in transport or cycling

- Using Google Scholar to identify academics who had written or co-authored papers related to cycling policy in a UM context within the past five years

- Using a list of local campaign groups forming part of the CycleNation federation and emailing chairs of these

- Using attendance lists from three recent cycle planning related conferences held in England, which included attendees from above groups but also private sector companies, NGOs, architects, developers etc.

- Contacting people named on a list of practitioners who are members of the Society of Road Safety Auditors

Survey design and management

The survey was designed using the Qualtrics online platform. Ideas for survey design and questions (e.g. the listed barriers used in questions) were developed following initial stakeholder interviews with seven selected stakeholders involved in cycle planning across England and beyond.

The questionnaire was developed through a process involving (i) initial piloting with colleagues, (ii) interviews with selected stakeholders to help develop and refine the questions asked, and (iii) a live pilot with a small sample of the participant list (50), following which final changes were made. After this three-stage process, the questionnaire was sent live to 1,733 people of whom around 27% began the survey and around 23% finally completed it.

The questionnaire needed to be relatively brief and comprehensible to a range of different stakeholders, making piloting crucial. It including questions in the following areas:

- Views on whether different factors acted as barriers to cycling investment, and their comparative strength
- Examples of barriers to cycling investment that participants had experienced
- Views on whether different factors acted to enable cycling investment, and their comparative importance
- Examples of enabling factors that participants had experienced
- Views on whether it was becoming easier or harder to invest in cycling
- Information about participant demographics, educational background, sector/stakeholder type, and regional expertise

The survey was opened on the 21 June 2016 and was closed on the 28th July. Following the survey closure data was downloaded, anonymised, and cleaned. Personal details of respondents held separately and securely to allow re-contacting (most participants wanted to be emailed with details of the survey results).

Who responded to the survey

Organisation, role and region

Of the 1,733 people in the sampling frame, 476 respondents at least partially to the survey. Of these, data from 413 respondents is included here as 63 had completely very little of the survey (e.g. only agreed to participate).

The 413 respondents came from a range of sectors and regions. Using the original sampling frame, we can see that many came from governmental organisations:

Organisation type	Frequency	Percent (of 407*)
Academic (e.g. university)	61	15.0
Consultancy (e.g. engineering consultancy)	60	14.7
Government (London) – e.g. London borough	52	12.8
Government (non-London) – e.g. local enterprise partnership or local authority	141	34.6

NGO – e.g. small or large charity	49	12.0
Private (generally businesses involved in the cycling sector, e.g. training providers)	44	10.8
Total	407	98.5

*6 could not be classified

Respondents were also asked to classify their role, with multiple choices permitted. The results of this were as follows:

Role	**Frequency**	**Percent (of 355*)**
Officer for a transport body (e.g. LA, LEP)	146	41.1
Consultant	80	22.5
Other	60	16.9
Academic	52	14.6
Advocate	41	11.5
Business stakeholder	22	6.2
Politician	4	1.1
Total	**355**	**100**

*355 people answered this question

The main group missing from the data collected is politicians, with only four respondents choosing this option: although it is worth highlighting that several who answered 'other' were for example local councillors. By contrast, nearly 150 said that they were officers for a transport body. Hence, views about local authorities reported here are more reflective of the opinions of officers than of members, if and when these differ. While it was difficult to identify relevant LEP personnel (often websites did not make clear which officer(s) or Board member(s) had responsibility for, or expertise in, transport), 16 of the 136 LEP personnel contacted did respond.

The roles chosen by individuals do not necessarily map onto our organisational classification: only 22 respondents described themselves as business stakeholders, compared to 44 classified as coming from private sector organisations (excluding consultancies). It is likely that some representatives of small cycling businesses, often social enterprises, would not call themselves a 'business stakeholder'. There is also much cross-over between sectors and roles, with some people who have local authority email addresses being formally employed by a consultancy, for instance.

Respondents were asked about which English regions their expertise related to. Again they could choose more than one: some respondents worked or had recently worked in a range of regions, or were currently in roles which involved them in cycle planning across regional boundaries.

The results suggest a reasonably diverse mix of expertise, with – perhaps not surprisingly – London strongly represented.

Expertise	**Frequency**	**Percent (of 360*)**
Greater London	127	35.5
South East	93	25.8
South West	65	18.1

North East	43	11.9
Yorkshire and the Humber	36	10.0
West Midlands	34	9.4
East of England	34	9.4
East Midlands	30	8.3
North West	26	7.2
Total	**355**	**100**

*360 people answered this question

Demographics and personal characteristics of respondents

Of the 355 people who responded to the question about gender, 232 (65.4%) said they were male and 119 (33.5%) female. The age breakdown of respondents is shown below and largely reflects a professional and practitioner cohort (very few under 25 or over 65).

Age group	Frequency	Percent (of 355*)
Under 25	7	2.0
25-34	66	18.6
35-44	97	27.3
45-54	106	29.9
55-64	64	18.0
65+	15	4.2
Total	355	100.0

*355 people answered this question

Respondents generally had quite a high level of education, with 68.2% (242 of the 355 who answered this question) saying that they had an undergraduate degree. 35.8% (127 of the 355 who answered this question) said that they had a Masters level degree, often (but not always) in a related field such as engineering or transportation. 16.1% (57 of the 355 who answered this question) had a PhD.

Finally, respondents were asked whether they personally cycled. The overwhelming majority of the 353 people who answered this question said they did; 63.2% (223) saying they regularly ride, and 28.9% (102) saying they occasionally ride. Only 7.9% (28) said they did not cycle.

Headline findings

Main barriers to investing in cycling

Respondents were presented with a list of 8 potential barriers to investing in cycling, and asked to indicate for each whether they thought it was (a) definitely a barrier, (b) possibly a barrier, or (c) not a barrier. ("Don't know" was also an option). Respondents were also invited to name up to 5 additional barriers.

For all barriers that the respondent had indicated were definitely or possibly a barrier (up to 13, although for most people much less than 13), they were also invited to give an example, if wished. If an example was given, the respondent was asked whether the barrier was overcome either fully or partially (there was also a 'Don't know/Not yet clear' option). In total 657 barrier examples were

given by respondents, an average of just over fifty (50.5) per barrier, although the eight pre-defined barriers attracted more examples on average than the user-defined barriers.

Examples of barriers

The table below presents for each of these eight barriers, a couple of examples given by participants. Names of schemes and organisations have where necessary been removed.

Barrier	Example
Financial/funding barriers	CCAG funding only confirmed on an in-year basis. Lack of funding certainty into future financial years preventing contractual commitments being made to schemes extending over more than one financial year.
	Changes to funding and grants from central government makes it increasingly unpredictable, therefore it cannot be relied upon to deliver long-term, cohesive projects. In order to overcome this, S106 funding agreements have been drawn up between the authority and developers, whereby for each new house, a contribution is made to fund sustainable transport initiatives. This has helped overcome the problem as it is now possible to forecast the funding towards the future, and invest in some larger projects; however is dependent on the building of new homes.
Lack of political leadership	Politicians are only prepared to support cycling schemes if they don't impact on other transport routes. They feel under pressure to ease congestion on the roads and so are reluctant to support cycling schemes that reallocate road space to cyclists rather than cars. In [], some [funded] routes were watered down so much from a political level that the schemes became pointless.
	The [] network originally had political leadership, but soon after the cabinet member involved left the council, work came to a halt. Her first replacement held the position for a short time during which she showed great interest, to be replaced by someone who took little interest in the project. When this occurred, [] Cycling Campaign got no support from councillors on the cycling forum.
Lack of support within transport authority	Focus is on motor vehicles, most of the engineers drive to work and there is a culture of improving car speed and volume rather than decrease it. The culture is the car. The authority would rather status quo and an easy job rather than experiment and change which might bring with it difficulties from the public who are resistant to change.
	[A] level of silo working that leaves no relevant dept. with the responsibility or authority to push improvements through. A few officers with personal motivation try to get some things going almost as side projects to their main work but generally run out of time or motivation when support fails to come.
Transport planning tools	Transport planning tools such as ARCADY and LINSIG completely ignore cycling, I do not think tools like VISSIM have even been used locally and there seems no will to challenge developer-provided transport assessments which contain basic errors on cycling levels or current infrastructure.
	Economic transport appraisal models do not adequately factor in the benefits of cycling (and other sustainable modes). In London, in building the case for the investment in cycling and securing the £913m

	for our business plan for cycling we had to take a different approach - traditional BCRs were not going to cut it. The models did not accurately capture cycling and the values of time could not be applied in the same way (and indeed the modelling meant a possible disbenefit to other traffic which was far greater due to the limitations of models). We included far more qualitative information within the case including the economic benefits (cycle cafes, new shops, events), demand by residents for housing with cycle parking and other infrastructure, the value businesses put on car-free and improved urban realm areas, and modelling of health (which is available, but could be better) and the comparison of how much it costs per trip to invest in cycling compared to other modes - this demonstrated comparative value for money when limited budgets and a growing population. This wasn't easy, but investment grew massively.
Public opposition	Part of our business cases include a section on whether we have local community support for our proposals (under the banner of localism). I have run many consultations and there is always going to be a spectrum of views and this is difficult to present to a funder in a positive way. Funders get nervous at any local opposition. Ultimately we tend to make compromises to get the scheme through but then the scheme often does not have the desired effect
	I was recently involved with a small scheme to create a 'missing link' in a local traffic free network. This was blocked by residents, despite support from ward councillor. Small majority opposed the scheme and an on-road alternative chosen. LA was not willing to press on with traffic free route, which also links two schools and a train station.
Lack of technical expertise	Lack of knowledge and interest among very senior transport officers about full or light segregation and MfS [Manual for Streets] or MfS2. Still using DMRB [Design Manual for Roads and Bridges] for corner radii and side road junctions and traffic signals.
	Our local authority consistently builds substandard cycling infrastructure on the basis that it 'matches' pre-existing provision. For instance ~0.7m wide cycle lanes on a busy road. There is no expertise on how to build high-quality cycling infrastructure - if and when anything is built, cycling is simply lumped in with walking on the footway.
Local media opposition	Local media tend to look for negative notes to attract readership. They tend to be small editorial and journalist teams that do not follow stories though in as much detail. The result is that they tend to report negatively and with factual mistakes. This puts massive pressure on local politicians. Cycling is even more adversely affected as cycling schemes are rare and misunderstood. In deprived communities they are seen as infrastructure for the "well-off"; in well off communities it is seen as an attack on car usage or car ownership. Negative local press puts local councillors under huge pressure and as a result they tend to be very risk adverse towards cycling schemes which leads to lack of support for local investment in cycling. Local press has been negative [] even in places where the local community is in favour. This has made the cabinet approval process for schemes and consultation extremely difficult. As a result it will be challenging to spend the money allocated which will compromise future investment.

	Our local media engages in nothing short of inflammatory click bait articles which are guaranteed to produce large numbers of comments. I don't always believe the media is hostile but they create a hostile environment. This is presumably because they are more than aware that any cycling story generates a large amount of Facebook or Twitter noise which in turn can be used as a hook for advertisers in what is a difficult world for local papers. Some of our local media pages, especially [], border on the hateful. This prompts commenters to almost incriminate themselves "When I see a cyclist at night I put my full beam on, I hate them" or "I give them no room when I pass them, pay tax first" both are real comments and sadly are all too frequent.
Business opposition	Often [opposition from] small businesses for whom parking, loading and vehicle access are highly-valued. I think this is largely due to their own driving experience rather than that of their customers or delivery drivers. If business is doing alright any change is a risk / big uncertainty that causes worry and stress.
	There are several projects in place in [] to improve cycling and pedestrian routes in the city with infrastructure changes proposed that would impact on existing car parking bays. On each occasion many businesses express concerns that this will negatively effect their business if people can no longer park directly outside. They seem to overestimate how many customers arrive by car and use the parking outside. They don't seem to be aware of the benefits that a cycling and walking friendly environment will have on their street and the potential increase in customers it could bring (and that pedestrians are reported to spend more than those that arrive by car - see Living Streets' Pedestrian Pound report). In one of the projects they are doing extensive consultation with businesses (and residents) to ask them what they'd like to see and conducting trials of improvements before committing to any permanent infrastructure changes.

Financial/funding barriers included a lack of funding from Central Government, and also a failure to invest in cycling (and walking) on the part of local authorities or Local Enterprise Partnerships. Many cited the continued prioritisation of car-based transport, which at a time of funding cuts left very little available for other modes. Others said it was difficult to start investing substantially in cycling when other policy areas were seeing large reductions in funding.

A number of respondents made reference to bidding processes which they felt made it difficult to plan and implement high-quality schemes, due to timescales and uncertainties (both over whether a specific scheme would be funded, or whether there would be any cycle funding following the current tranche). There was also comment that competition between authorities made it harder to collaborate and share learning.

Lack of political leadership was interpreted not just to mean leadership by politicians, but also support at a senior officer level, in local and central government. ‘Good examples’ were given relating to London and to other cities with elected Mayors; a number of respondents suggested Mayoral systems helped in encouraging political leadership as opposed to a ‘faceless’ authority

(although it should be noted that elsewhere there was concern that this meant an authority's approach could change substantially every four years).

Other respondents gave examples of elected members over-ruling schemes that had public support, perhaps due to a lack of interest in or understanding of cycling. Many political leaders and senior officers were described as assuming that prioritising car traffic was necessary for economic growth, and not believing that cycling could be a mainstream mass transport model.

People commented that there was a perception that cycling was not generally a high priority for decision-makers at national and at local levels. This last was seen as additionally problematic for cycling (as opposed to other policy areas), because building networks will usually require co-operation between authorities.

Lack of support within the transport authority was linked to funding, with one respondent commenting that lack of support stemmed from it not being 'recognised as an activity that has consistent funding. It was also connected to 'car culture' also mentioned above (and raised by some as a separate barrier) where car transport is seen as normal within the authority, and other modes as less important and less valuable. One respondent talked of delivering training to colleagues about the impact of poor junction design, and being met with victim blaming and a reluctance to believe that junctions could be designed any better for non-motorised users.

Organisational restructuring was also cited as reducing potential support for cycling. Some local transport bodies and local enterprise partnerships were said to spend little or nothing on cycling. Other issues involved reorganisation of local authority teams, affecting the capacity of officers to deliver outside areas seen as core priorities (e.g. cycling, but also affecting for instance the ability to consult effectively). Even where an authority or departments were not actively opposed to cycling, often the status quo is the line of least resistance, usually implying little to poor cycle provision.

Sometimes, very committed individuals were cited as having ensured good cycle infrastructure was implemented, despite lack of support in the organisation. Conversely, one respondent cited an experience where a team within the local authority had put in a bid for national funding, and was very enthusiastic about the plans. However, they had not consulted others within the authority and when it became apparent that motor traffic capacity would be lost, this led to compromise on implementation.

Transport planning tools were cited as dealing poorly with cycling; for example, being unable to estimate potential cycling uptake generated through a new route or network. Cycling was described as an afterthought within planning and development control more broadly, with new developments built around the car and any cycle provision added if at all afterwards, once journey patterns had already been established. One respondent pointed out that a lack of good data was perpetuated due to a lack of consistency across the country in terms of data collection, monitoring and evaluation.

Traditional cost-benefit analysis (CBA) within transport appraisal was cited as particularly problematic. Priority given to motorists' time savings combined with the difficulty measuring the benefits of cycling (and uptake) to make it hard to justify schemes, particularly when they involve re-allocating motor traffic lanes. One respondent cited the example of Transport for London's 'Cycling

Vision' business case, which did not rely primarily on CBA but used a much wider range of costs and benefits, including qualitative benefits as well as factors that could be measured and costed.

Safety audits were highlighted; respondents identified on the one hand an apparently risk-averse 'road safety' culture that blocked cycling innovations, alongside failures within current safety auditing practice that perpetuated risky designs for cycling.

In response to these challenges, some respondents (mainly in relation to London) indicated work being done to improve modelling and appraisal tools. Others suggested it was mainly 'value for money' criteria, not tools, that needed to change; that assessment should be more qualitative and less quantitative; that local authorities should be free to invest in schemes that did not provide 'value for money' under the current CBA rules; or that WebTAG should be radically revised.

Lack of technical expertise was highlighted as a problem due to there often being a lack of good examples of cycle infrastructure in any given town. This could be compounded by the continued use of outdated or inappropriate guidance; for example, DMRB (Design Manual for Roads and Bridges) being used as the default for urban areas, despite more recent design guidance for streets, walking and cycling being available. Some respondents said it was important that people designing a cycle infrastructure scheme should cycle themselves, but that this was not the case where they worked.

The lack of long term funding mentioned above was highlighted as a problem is developing new and sustained expertise in cycling. People said that teams were small and in-house expertise limited; but consultancies were not necessarily any better (although often more expensive). In London the picture is slightly different with more investment in cycling: but here an inter-borough (and Transport for London) 'brain drain' can mean that authorities struggle to keep experienced and skilled staff.

More broadly, pay, conditions, and status were mentioned as reasons why the transport planning sector (or specific parts of it) struggled to attract and retain talented professionals: 'The industry as a whole is undervalued and pay does not reflect the skill level required. As such the pool of skilled/experienced engineers/planners/project managers is small and results in poorly delivered schemes/major projects which creates a negative perception of transport/highways engineering.'

Respondents pointed out that design guidance used by authorities was sometimes unhelpful, for example in terms of side road crossings (and that there were examples where our traffic laws block better solutions) but also cited needlessly substandard features designed into schemes due to lack of technical expertise or understanding of designing for cycling. Examples were given where designs were seen as actively dangerous and unnecessarily so; such as putting cycle lanes in the 'door zone' on the outside of car parking.

Public opposition could sometimes lead to a scheme being stopped, but respondents also said that the belief that there *would be* public opposition (for instance, because of reduced junction capacity and resulting congestion) stopped schemes being investigated in the first place. Change to car parking was described as a particularly sensitive issue, where a small number of objections could lead to a politician insisting a scheme be withdrawn.

Respondents identified a vicious circle: whereby schemes were opposed because of the belief they would make conditions worse for drivers, leading to schemes being watered down and so failing to

attract new people to cycle, reinforcing the view that a substantial switch to cycling is unfeasible (so taking space away from motor traffic for cycling schemes pointless and wasteful). Public support or opposition can be an issue while bids for funding are being submitted, potentially weakening schemes early in the process. Although many such examples were given, there were also a few examples given of places where strong leadership from officers and politicians managed to maintain scheme quality in the face of noisy (albeit minority) protests. A few respondents said public attitudes were changing for the better and there was greater recognition of the need for safe cycle routes.

Two broader problems related to public opposition/support were (i) negative attitudes towards cyclists among much of the public and (ii) lack of trust in local government.

While **local media opposition** was less often cited as a specific problem, negative coverage in local media outlets had led to schemes being blocked, or watered down. Negative stories were seen as putting enormous pressure on local politicians; respondents suggested that stories were often inaccurate but that it was often difficult to counter such beliefs once established. However, there were cases where 'pro' scheme campaigners had succeeded in having their voice heard in local media, through comments and through achieving more balanced news coverage.

Others said that local media was generally uninterested in cycling, unless a serious collision occurred. In regional media the younger journalists, who might cover cycling and be more likely to cycle themselves, were unlikely to be retained, one respondent said.

Some examples of **business opposition** involved high-profile lobbying by big business, or action by a Local Enterprise Partnership (as representing businesses), but most involved small businesses worried about change and potential loss of revenue. Respondents suggested that businesses tend to over-estimate the extent to which their customers travel by car, and to be strongly attached to parking spaces in front of premises. They said that businesses lacked an understanding of the extent to which a good cycling and walking environment could potentially benefit their trade.

Other barriers

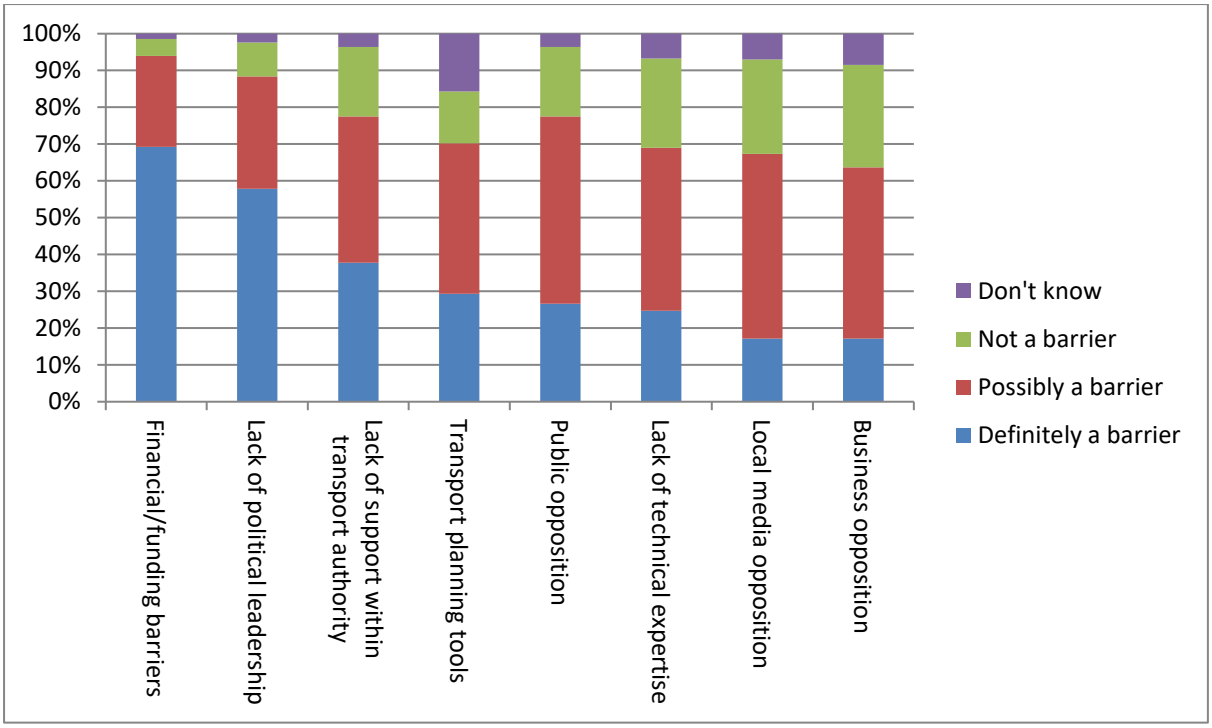
Respondents were also asked to list up to five additional barriers. 386 responses were received; although some fitted within the already discussed themes (e.g. pointing out that lack of funding had led to a lack of experienced staff in post). The main additional (generally complementary) themes raised were:

- the bidding process as problematic (separate from the actual amounts of funding)
- car dominance in organisations and in wider culture; with car (industry) lobbying also mentioned
- lack of road space to implement cycle infrastructure (this was cited in relation to narrow rural roads and to busy city streets)
- impacts of cycle infrastructure on other modes or users
- lack of awareness of the benefits of cycling

These were each cited by at least ten respondents, although not all gave examples.

Views on whether listed factors are barriers

All 413 respondents answered this question, with the results summarised in the following chart:

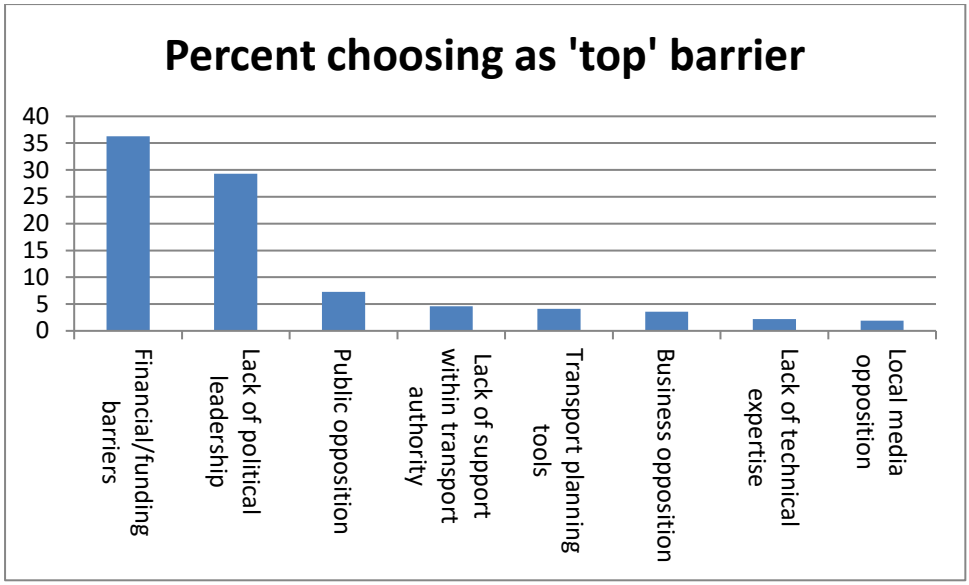


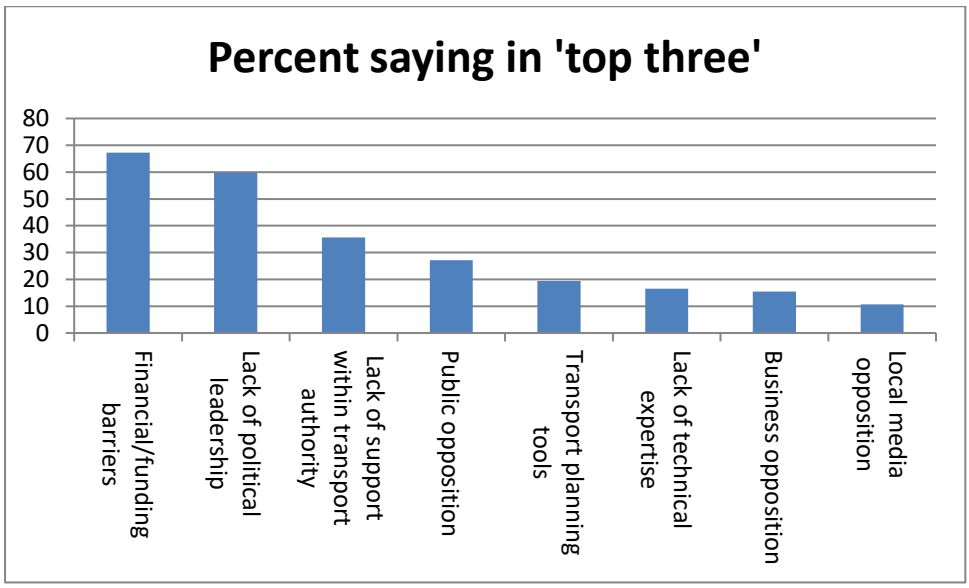
Almost seven in ten (69.2%) identified financial/funding problems as definitely a barrier to investing in cycling. The second and third most popular choices, lack of political leadership and lack of support within the transport authority, were identified as definitely barriers by 57.9 and 39.7% respectively.

Local media and business opposition were the least likely to be identified as barriers; in general, funding, leadership and transport authority support were seen as most problematic, with 'external' barriers seen as less so. However, over three-quarters did identify public opposition as definitely or possibly a barrier to investing in cycling.

It is worth stressing that all these barriers are potentially interconnected. For example, a scheme might achieve funding, but then attract a handful of objections: because of lack of local political will, a decision might be taken not to invest in it. Is that a 'political leadership' issue, or a 'public opposition' issue?

To explore these issues further, respondents were asked to rank the barriers, and the tables below present information on both 'top barriers' and 'top three barriers'.



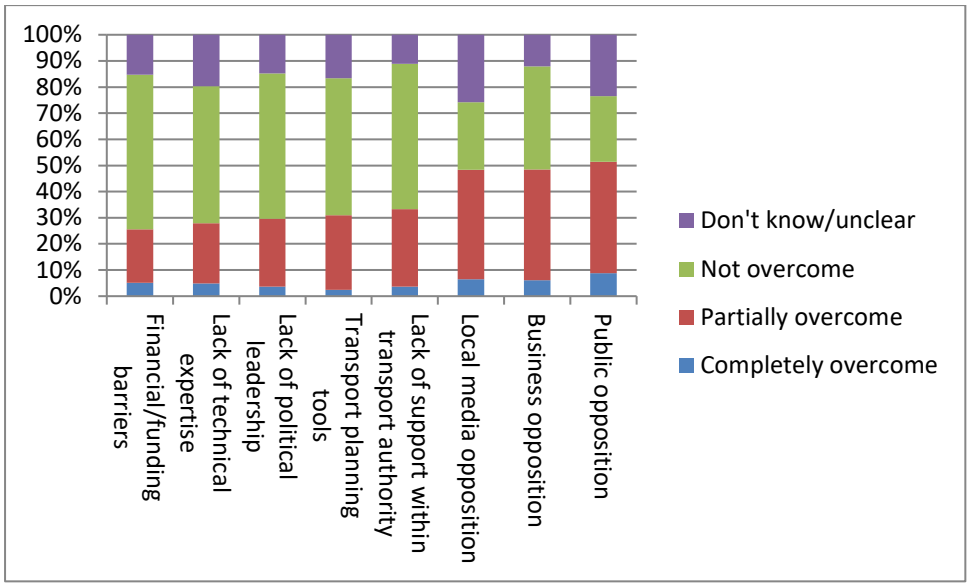


The graphs clearly identify financial/funding barriers as the major challenge, with lack of political leadership also seen as crucial. Public opposition comes third in the first graph, but only fourth in the second. In some cases, it is extremely important, but seems to be less of a consistent problem across schemes. By contrast, lack of support within the transport authority is identified less often as the 'top' problem, but more commonly cited as being within the top three. Transport planning tools come fifth in both graphs, while problems with technical expertise, business and local media opposition are seen as least important.

Overcoming barriers

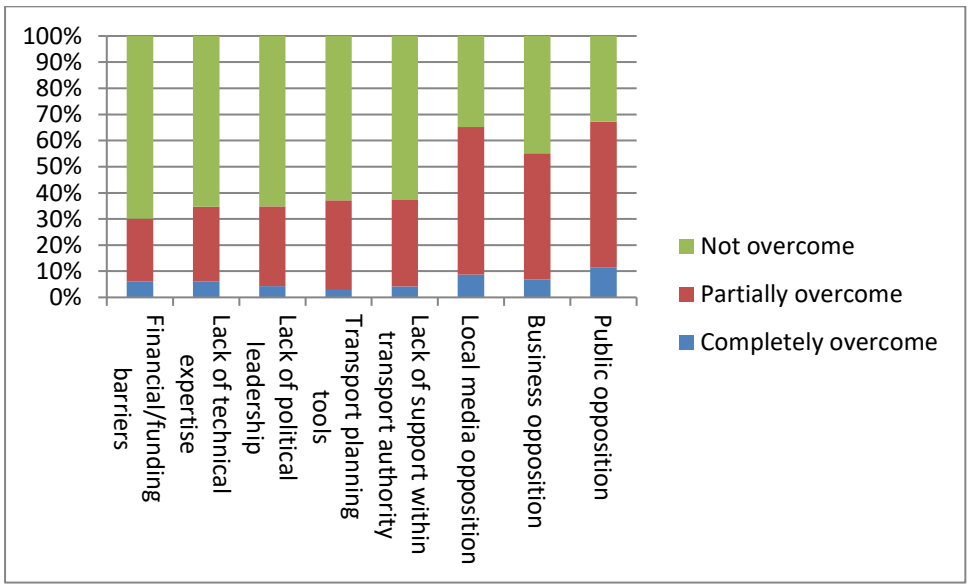
It is important not just to examine what factors act as barriers, but how easy they are to overcome. A factor might, for instance, be very frequently encountered, yet for this reason people may have found effective ways of circumventing it. The graph below presents the extent to which the eight named factors were described as having been overcome. The question related to the provision of specific examples chosen by respondents; so we cannot assume that the success rate found here is

more generally applicable. However, this question does probably provide a good comparison between the barriers, indicating which were experienced by respondents as the most intractable.



(Numbers of people giving examples for each barrier are as follows: 42, 54, 81, 98, 68, 61, 33 and 31 respectively, following the axis left to right).

The graph below shows the same information, but removing the 'don't knows':



The most commonly cited barriers were cited as being most difficult to overcome – financial/funding barriers or lack of political leadership were both almost impossible to overcome completely, and in under 30% of cases had been overcome to any extent. It is worth pointing out that 'partially overcoming' a problem, in the examples, often meant weakening a scheme to the extent that – according to respondents – it might not achieve its original objectives. Lack of technical expertise and transport planning tools, while less frequently encountered, were similarly problematic, as was lack of support within the transport authority (a problem that over half of respondents said acted as a complete barrier).

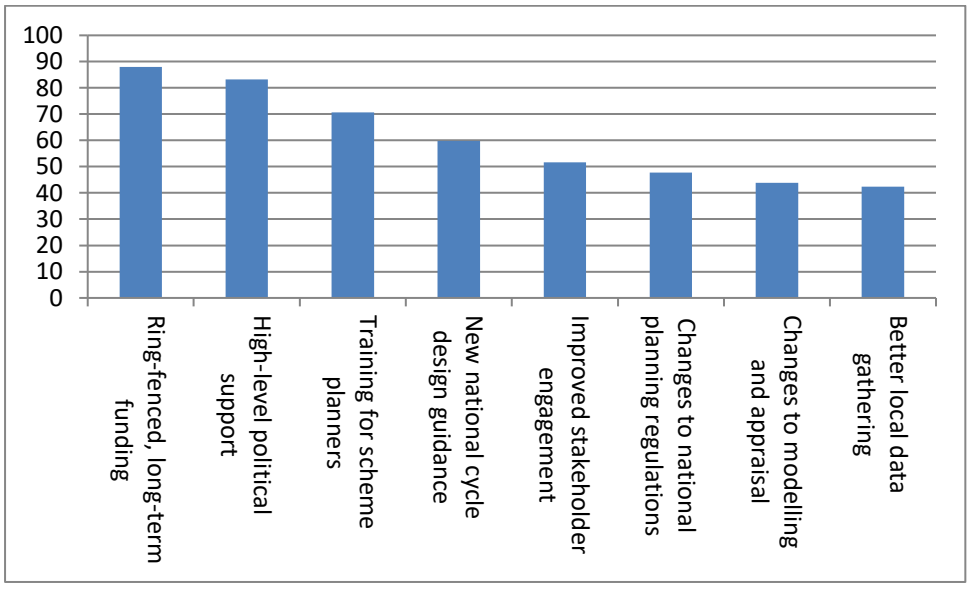
The three 'external' barriers (i.e. external to government), opposition from business, the public and local media, were all seen as easier to overcome than the internal barriers – although partial rather than complete success was the norm, with business opposition the most problematic.

Finally in this section, the table below presents the extent to which people said that examples related to the top 5 user-defined barriers were overcome. Numbers are small because not everyone gave an example, even if more than ten people cited a specific barrier, so they have been presented as numbers rather than percentages.

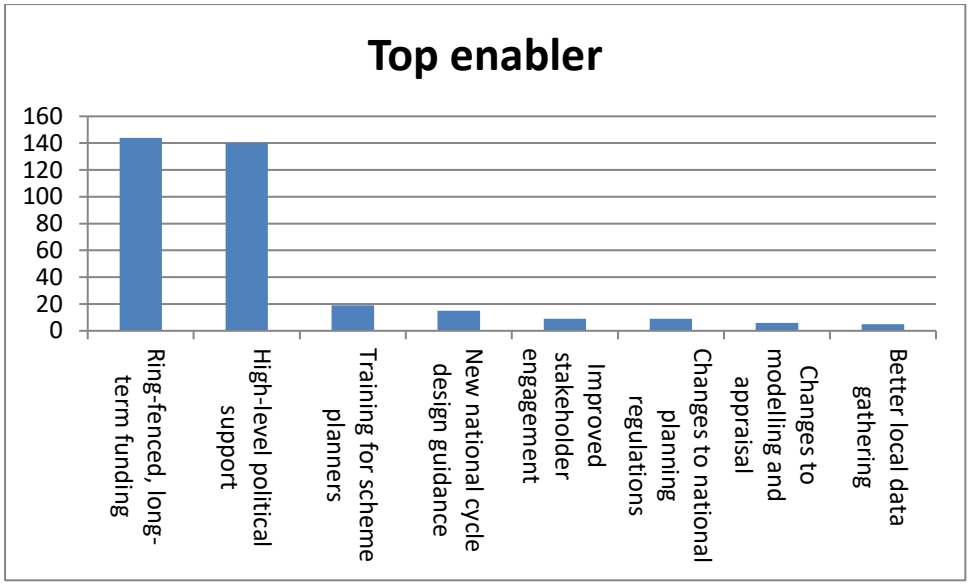
Barrier	Completely overcome	Partially overcome	Not overcome	Don't know/unclear	Total
Car dominance	0	2	12	0	14
Lack of available roadspace	2	2	6	1	11
Impact on other modes	0	1	8	1	10
Bidding processes	0	3	4	1	8
Poor awareness of the benefits	0	3	5	0	8

Main factors enabling investment in cycling

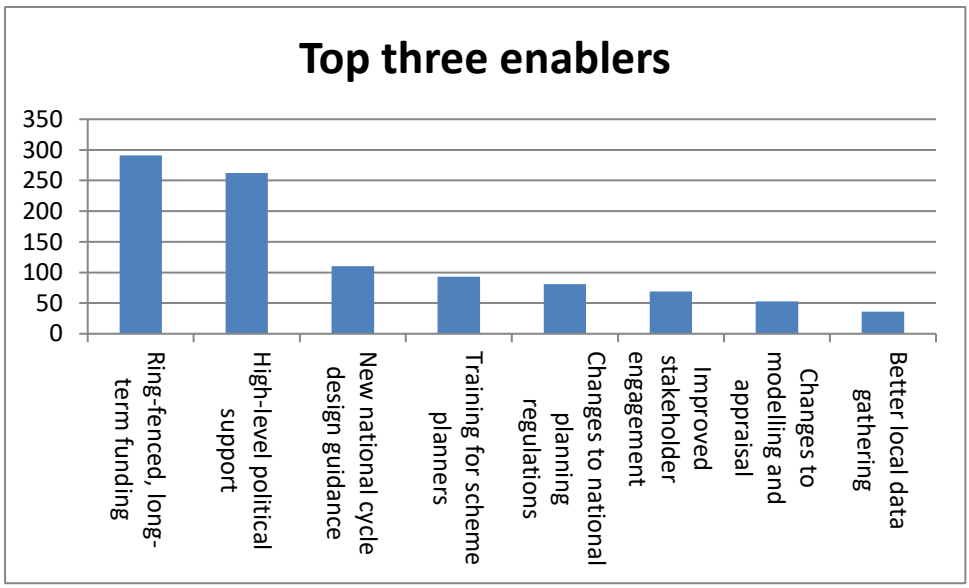
Respondents were now asked about factors enabling investment in cycling. Again, they were given eight pre-defined options but also asked to name up to five additional factors, if they wished. Respondents were asked to tick if they thought a factor did, could, or would enable investment in cycling. The graph below shows the percentage of those answering this question (368 participants) who selected each factor:



As previously, respondents were asked to rank the factors. Just looking at the eight named factors, the charts below show the percentage of respondents choosing them as (i) the most important factor and (ii) one of their top three factors.



It can be seen that respondents overwhelmingly choose either ring-fenced, long-term national funding for cycling or high-level political support as their top enabling factor. The number of respondents choosing any one of the eight factors (as opposed to a factor of their choice) was 347 out of the 368 who answered this question, suggesting that there were not additional extremely important factors that were missed out.



Comments on enabling factors

The table below presents examples of comments related to each enabling factor. Many stressed the relations between the two, and there were also comments that (for example) high level political support would be an empty gesture if funding were not attached. Most respondents suggested that both more money and more support were needed, but they disagreed over which was the most crucial and which 'came first' (i.e., will a high level supporter find the money, or does funding then generate interest and support, or both?) Others pointed out that even without political leadership, officers could make effective use of funding, or that in the absence of substantial funding the lack of political support forms an insurmountable barrier.

High level political support	In a time of constrained resources and funding, a high priority is needed to make things happen. Also needed to see you through the difficult consultation period.
	Only worthwhile if there is ring fenced long-term funding, if not it is hollow and pointless. Support should also be sustained in the long term. Assuming there is funding, local authorities will find a way if there is a will locally though, so not the most crucial thing.
Ring-fenced, long-term funding	The present system of bidding to obtain funding is not sustainable. It causes issues with gaps in infrastructure and half-finished projects because the funding has run out.
	IT would be nice to be able to produce a multi-year prioritised infrastructure programme which could be worked through without having to apply separately for funding for each scheme.
New national cycle design guidance	Must reflect different local situations, urban and rural, and include examples of best practice (UK and international)
	This is a fairly minor issue (I say as a contributor to LTN2/08). There is a plethora of guidance (Sustrans, LCDS, MFS), what is more relevant is that engineers still use DMRB as their Bible and so do Road Safety Auditors (another barrier I have not mentioned before). There are still some areas where innovative designs (e.g. cycle streets, turbo-roundabouts) are used on the continent but they have not been incorporated in English guidance.
Training for scheme planners and designers	In my experience, highways engineers were trained to a high technical level to design roads, but cycle tracks were just seen as an add-on.
	[Training] needs to be accompanied by acceptance and compliance with good practice by those making planning decisions. Those planning and designing a cycle route may know full well cyclists/potential cyclists need cycle lanes to continue through junctions, but if decision makers don't support this and allow it to happen, those planning and designing are working with one hand tied behind their back! That said, if there is sufficient popular support and demand for cycle provision all these technical issues will be overcome.
Improved stakeholder engagement	This is an important pre-requisite for political support. The Mayor's Roads Task force essentially gave Boris [Johnson] the green light for major cycling schemes and changes in approach to road design. Without it, many of the stakeholders involved would probably have proved difficult.
	Stakeholders need to be involved at the earliest stage of each plan and design, rather than just being consulted when a lot of effort has been spent on it.

Changes to modelling and appraisal practices	These fail to recognise the importance of avoiding delays/halts and detours to bicycle users, nor the capacity advantages for traffic systems of mode switching from car to bike.
	Somehow Copenhagen gets a whole different BCR for cycling. Also the BCR should be used to decide between schemes as part of a strategy of (e.g. decarbonising transport) not as a proxy for a strategy as roads will always win.
Changes to national planning regulations	Include an Active Travel type bill that makes new development or transport project look at developing cycling and walking as an integral part of their plans including enhancing and connecting with existing network.
	Removing on street parking on major direct routes is extremely hard to do. If we want direct, cohesive, cycle networks, this issue must be addressed.
Improved local data gathering capacity	Data needed to identify where people are most likely to want to cycle.
	Local cycle counters are gradually falling into disrepair. General major road count points and cordons miss the many cyclists who prefer to use minor roads and cycle tracks.

Many respondents commented that **ring-fenced, long-term funding** was crucial to delivering investment in cycling. There was some concern that modal specific funding is not ideal in the longer term (and that badging schemes as 'for cycling' can cause problems in the shorter term). However, most respondents thought that given the multiple barriers to cycling investment experienced across England, ring-fencing is currently very important to ensure a step change in cycle provision (with some commenting that when cycling becomes mainstream, this may no longer be needed).

Long-term and coherent funding streams were seen as key in helping overcome some other barriers: creating a group of professionals with the skills and confidence to deliver for cycling over the longer term, rather than people working for a short period of time on a scheme who will later leave an authority or be moved to other projects. Respondents commented that currently, funding for cycling infrastructure was secured if at all on a temporary and ad hoc basis, by comparison for instance with funding for road and rail infrastructure.

Respondents also commented that at present, cycle funding if available at all is seen to be channelled to a few favoured large cities, leaving most authorities 'floundering from one small project to the next'.

High-level political support was chosen by almost as many people as the top barrier to investing in cycling. This was interpreted as being needed at both a national and local level: from national politicians and from, for instance, cabinet members in a local authority (although with the caveat that support needed to be cross-party and not dependent on a particular political group). It was also stressed that this needed to be accompanied by funding.

Respondents commented that consultations were always likely to be challenging, and therefore it was important that people implementing schemes felt supported. While this would not always ensure success, its lack made implementation very difficult – and led to compromises that might weaken a scheme so much that it had little or no positive effect.

Several respondents said that a Mayoral system had been important in enabling change in several cities. While having a Mayor did not necessarily translate into greater priority for cycling, where the individual concerned had a strong vision and/or could be persuaded to lead change, this could be very important.

National cycle design guidance was the third most popular enabler, however sitting well behind political leadership and funding. In comments, respondents were sometimes ambivalent, pointing out that a poor (and potentially soon outdated) document could cause more problems than it solved. It was stressed that regular updating would be needed to take advantage of innovation. Others said that good guidance already existed (e.g. London Cycle Design Standards) and it would be better for authorities to use this than to begin creating new national guidance/standards.

Training was rarely selected as the top enabler, but over 70% said it would be helpful. Respondents felt that too often, being able to plan and design cycle schemes was seen as an add-on (if included at all) in engineering and transport planning training and education. There was scepticism as to whether those who needed training most will take it up, one respondent commenting 'I am not sure how often it is offered but not used'. Respondents commented that cycling officers might themselves be knowledgeable and enthusiastic, but they lacked political and engineering support.

Sending engineers to see Dutch infrastructure was mentioned, as was getting heads of industry and sector leaders on board, and ensuring that cycling is mainstreamed into CPD and professional accreditation. Respondents talked of the need to build up a long-term base of staff skills, which could then give councillors the confidence to support schemes - and understand what is important and should not be compromised. One person said that DfT should set up a national training scheme.

Improved stakeholder engagement was mentioned as being important at different stages of the process. Ensuring stakeholder buy-in for a broader vision necessitating changes to road space was cited, as was involving stakeholders early in the design of specific scheme plans. One important reason for better involving stakeholders and communities was cited as being that this could help authorities to identify unintended consequences of proposed designs and develop appropriate compromises to ensure support. Respondents mentioned the need to involve a wider range of stakeholders; for example potential as well as existing cyclists.

Changes to modelling and appraisal practices was commented on by relatively few respondents, however one example was given of a situation where funding was likely to be withdrawn from a scheme following an insufficiently good Benefit-Cost Ratio. The respondent said that while health benefits of cycling were included in the calculation, health disbenefits of private car use were not.

Other respondents commented that modelling and appraisal were geared towards private motor vehicle use, and had been little use in planning where to put cycle infrastructure. Instead, 'Many of the facilities we do have are located where it is easiest to put them rather than where people would most want to ride.' Further comments were made related to the role of modelling and appraisal,

which were seen as often substituted for a strategy, rather than being used to decide between different options within a policy-driven strategy.

One respondent commented that **national planning regulations** were not a problem, and in fact the only recent investment in cycling in their area had come from S106 or S278 funding. However, others identified issues and potential changes: and one said that much new development is designed to prioritise and perpetuate car travel. Other comments included the need to mainstream cycle provision into all new roads and upgrades, inconsistency in relation to speed limits, and the difficulty in removing on-street car parking on major routes. One person suggested an Active Travel Bill strengthening requirements on developers to consider cycling and walking more seriously and specifically to contribute to local active travel networks.

Improved local data gathering capacity was cited as helpful to make the case for cycling, particularly where there is not evident demand. One respondent noted that data collection is not standardised and consistent approaches to monitoring are needed; another commented that before-and-after evaluation does not happen effectively in their area.

Other enabling factors

Other enabling factors were not as easy to characterise as the additional barriers mentioned. Again some people reiterated factors already mentioned, such as ring-fencing; or in a few cases mentioning factors that might enable individuals to cycle (rather than help increase/improve cycling investment). One point made by several, however, was that more cyclists (e.g. through improved infrastructure) would then act as an enabling factor in itself, whether through direct pressure for more facilities, cultural normalisation, or the growing awareness that cyclists are also voters.

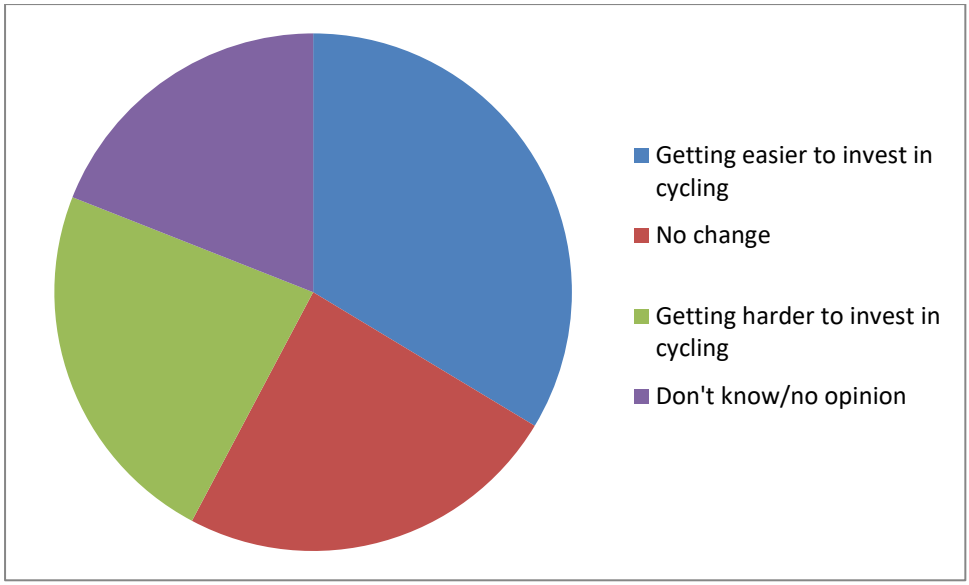
Selling schemes by putting more emphasis on the benefits of cycling was mentioned by eleven respondents, including mention of both economic and health benefits. Relatedly, respondents said that they would welcome more support from public health – usually moral support arguing for cycling, but sometimes also funding was mentioned – including from local public health colleagues and nationally from Public Health England and the National Health Service.

Several people said that trialling schemes could be encouraged and made easier, and that this could help with some of the other problems experienced. Educating councillors about cycling, trying to challenge misconceptions, was suggested as was the need for integrated planning – that cycling should be seen as a normal transport mode forming part of an overall system. The need for multi-disciplinary working and teams that were not only made up of engineers was also mentioned. Finally, respondents referenced the need for sharing best practice.

Additional potential sources of funding mentioned included sugar tax, and parking revenues.

Optimism

There were mixed views on whether it is getting easier or harder to invest in cycling. The pie chart shows the breakdown among the 357 respondents who answered this question:



Nearly half thought the situation was not changing or getting worse, while around a third thought it was getting easier. (The rest were unsure).

Additional comments

Respondents were asked for additional comments soon after the 'optimism' question, and many reflected on their responses to that question in particular. It was clear that many struggled to provide a single answer to the question, partly due to perceived growing spatial inequalities where London and some other areas were seen as relatively favourable contexts, but there was a perception that in much of the rest of the country things might actually be getting worse:

> Cycling investment seems to be a post code lottery. The vast majority of funding is targeted in a few big cities and still doesn't fully cater for the needs of those cities.

> The Government need to take cycling more seriously and spending per head needs to be hugely increased. The production of a toolkit for designers and engineers with potential solutions to specific issues would be very useful and may help address the lack of specific design skills for some engineers.

Respondents also identified factors that were improving cycling's chances alongside others that caused growing problems. Several commented that while the public were potentially getting more support of cycling investment, policy priorities and available funding were lagging behind:

> I think the public are getting more accepting of cyclists and cycling infrastructure. However, the funding has not yet followed the public surge of interest in cycling.

There was concern about LEPs' and the extent to which they were a barrier to funding sustainable transport schemes, and examples given where currently no or poor provision for cycling was being made along road upgrades. Respondents expressed concern that provision for car-based transport continued to be prioritised ahead of cycling and other more sustainable modes.

Other comments in this section expressed the need for complementary measures/training alongside infrastructure. Conversely, several respondents said they thought that cycling already had enough funding and/or too much infrastructure was being installed.

A selection of the comments given are included below, illustrating themes:

Spatial inequalities

'The areas in/around the market towns are the poor relations of big cities.'

'For smaller Borough LAs like ours it has become harder for us to obtain funding for cycling investment. We were lucky to obtain funding from the first round of LSTF, however now we have not been able to secure any funding in the latest round as the focus seems to be on larger cities and rural areas. As well as this, giving control of the local growth fund to the LEP has made it very difficult for us to secure funding. Within our LEP area no sustainable transport schemes were selected for funding.'

'Where local areas have identified cycling as a good tool to tackle key priorities and deliver on their vision of their local areas, investment is made. But where this connection has not been made, and/or there are greater priorities (e.g., social care, education) along with dwindling resources across the whole area, cycling is just not seen as a priority and it is actually getting more difficult.'

'I think the developments in London in the past few years are probably making it a more legitimate option for other UK cities e.g. [example 1], at the same time there is a risk that it only happens in London because there is more investment and leadership in cycling, but also generally. e.g. in [example 2] the local transport seems underdeveloped, so there is catching up in other areas - probably just other priorities - which make it hard to steer funding to investment in cycling. Being able to show the potential of cycling (e.g. by having different modelling tools), or having to use ring fenced funding for cycling could help with that. I also think it could be combined with tourism interests in [example 2].'

Need to mainstream cycling

'All new national road schemes or improvements, should include an off road cycle facility. For instance the new [road upgrade scheme] does not have a quality off road cycle facility on the Local Access Road which runs alongside the new motor way. This is a lost opportunity. Lip service is being paid to cycle schemes which do go in, with priority given to motor vehicles over cycles using the facility.'

'Disagree not only with the ring-fencing of walking and cycling, but also how walking and cycling are bundled together. The result in these harsh times is increasingly shared use paths and very poor infrastructure. I firmly believe that stronger political support and emphasis on cycling at EVERY highway scheme should be a priority. Particularly in urban areas, we should not be thinking about 'routes', but considering cycling at every stage. Maintenance should also be considered- cycle routes are often built and then left to gather dust (or weeds, shopping trolleys, etc!). Including existing cycle infrastructure in ongoing maintenance programs should be prioritised.'

'Existing (non-cycling) budgets for highway development and maintenance can be used for cycling without additional funding by incorporating cycling design as an integral part of these broader highway schemes.'

Continued low quality scheme design

‘Currently small funding amounts have been provided to [authority], but the funding has been squandered on facilities that are of little use to anyone wishing to use cycling as a transport option. Due to lack of national standards, facilities that have been provided are of very low quality and the result is that existing cyclists shun them. Having been implemented they are then left to decay with no maintenance and current green routes implemented in [authority] quickly become un-useable.’

‘It's getting easier, but at the same time, the reliance on local authorities makes things worse. Two reasons for this: 1) There is only national guidance on the quality of what gets built. So each LA interprets this individually. A better solution would be that national funding comes with national design standards, which would include priority of cycle tracks over side roads, prohibition on shared use paths, etc. 2) Cash strapped local authorities are systematically inflating overheads on cycling schemes to create revenue streams to fund core services.’

‘There's good political support locally for walking and cycling. It's the officers who block change, refuse to improve signal timings for pedestrians, refuse to implement schemes which give genuine legal priority to those cycling or real protection from motor traffic. Often it's led by engineers who have no experience of doing a school run with children, cycling and being scared by traffic or being elderly. There's no empathy. Most engineers seem to drive and like driving. They have very little interest in urban design or improving the environment for the most vulnerable.’

Provision for cars prioritised over cycling (and walking)

‘[A]ll our LGF [local growth fund] schemes are concentrated on getting more space and capacity for the car. In contrast, we have laid out plans for a comprehensive cycle network for the town, with identified costs and measures, but we do not even have the funding to sign it, let alone to improve it. Without political support and funding at the local level, there will be no progress. In all my 30 years, I have never been more pessimistic about the future of cycling.’

‘As funding sources become increasingly stretched, we are increasingly having to decide between cycling and road infrastructure, particularly in bids for central government funding. Given the political priorities and the inability to show cycle infrastructure will reduce congestion significantly, the funding almost always goes to roads, even if a less costly cycle scheme could have a more significant effect.’

‘In [example] there is now a fairly complete 'cycle network' making it possible to move through the city somehow. This has mostly been done by enabling pavement cycling and taking space from pedestrians. Projects being put forward for 'cycling ambition' are increasingly trivial, or inadequate work arounds, as the real challenges now are about taking space from cars. These are generally put in the too difficult pile and available funding is not usually sufficient for the required corridor approaches.’

‘Outside London and a very small handful of other cities, cycling is still not perceived by national or local politicians (i.e. funders) as a viable/genuine means of transport, that would justify taking measures that might impede car driving in any way, or take investment away from car driving.’

'There is a lack of understanding that constructing cycle paths and facilities requires engineers, tarmac suppliers, etc, and should be just as eligible as road-building for capital funding budgets or economic stimulus measures.'

Funding issues

'The separation of capital and revenue funding that LAs have access to is a major issue to fund any sustainable mobility projects. The fragmentation and complexity of multiple funding streams, combined with uncertainties concerning future funding availability, are also major barriers. The DfT seem to complicate rather than facilitate sustainable mobility funding.'

'My perception is that general public support for cycle infrastructure development is higher than it was, and local political support reflects this. Also there are lots of good noises coming from national government re investment in cycling. Unfortunately issues such as budget cuts and difficulties in securing developer contributions then undermines some of this progress.'

'[W]e have lost ground since 2011 when we had a bespoke transport team, far more data collection (especially in relation to schools' and employers' travel plans), ring fenced funding and control of budgets and scheme prioritisation. We are recovering some ground but despite not because of our situation.'

Local Enterprise Partnerships (LEPs)

'Funding is shrinking and too much of what is there is in the hands of LEPs with little or no interest in increased cycling.'

'Large amount of funding is allocated to transport, particularly roads and rail, so it is not the overall amount of funding available for transport that is the issue. Cycling and walking needs to be given the same weight and level of importance as other modes of transport. LEP process is not transparent for decision making. Unclear how LEPs have the knowledge and foresight to make investment decisions beyond current paradigm.'

'The shift of power from Local Enterprise Partnerships (who mostly know nothing about cycling, and have no interest in it) to Combined Authorities (with elected mayors) will probably result in more cycle-friendly decision-making, at least in the larger cities.'

'The switch to transport funding via LEPs and S106 agreements makes forward planning difficult. LEPs, from my knowledge, tend to see cycling as of secondary (or lower) importance for economic development. S106 often include cycling improvements, but tend to be piecemeal.'

Evidence-based Policy

'A perfect cycle lane from front door to work will still not work for many commuters if they can't get children to/from daycare/school without a car. Supermarket shopping, especially with the boom in local stores and personal business are other key destinations in trip chains, and trip chaining is a known barrier to cycling (see [Understanding Walking and Cycling]). Essentially, those designing and planning need to provide local networks serving key destinations for accessibility just as much as they need to provide radial routes.'

'Investment should be made on evidence and science; currently in transport it is made on political whim and the influence of business leaders. Given population projections, there is no plausible road

strategy that can support the number of cars on the road if current travel trends are sustained. We must act to build a better and resilient future, not watch the inevitable consequence and destroy great places.'

Crosstabulated Findings

This section examines the impact of demographic/locational factors on optimism and on the barriers and enablers people thought were most important. Differences are included where found as part of crosstabulations that showed a statistically significant result ($p<0.01$). Because of the nature of the population being sampled, obtaining a random sample (as one can do with households, for instance) was not feasible and hence a purposive strategy was followed. Hence we cannot be sure that a statistically significant finding applies beyond the 413 respondents.

Optimism, by organisation

People based in governmental organisations in London were well over twice as likely to be optimistic as those based outside (56.5% vs. 21.2%).

	Getting easier	No change	Getting harder	Don't know	Total
Academic	15	9	5	25	54
	27.8%	16.7%	9.3%	46.3%	100.0%
Consultancy	23	12	5	9	49
	46.9%	24.5%	10.2%	18.4%	100.0%
Government (London)	26	7	8	5	46
	56.5%	15.2%	17.4%	10.9%	100.0%
Government (non-London)	25	40	36	17	118
	21.2%	33.9%	30.5%	14.4%	100.0%
NGO	8	9	23	4	44
	18.2%	20.5%	52.3%	9.1%	100.0%
Private	20	9	3	8	40
	50.0%	22.5%	7.5%	20.0%	100.0%
Total	117	86	80	68	351
	33.3%	24.5%	22.8%	19.4%	100.0%

Optimism, by role

The main difference by self-defined role was that the advocates tended to be more pessimistic than others (nearly half said it was getting harder to invest in cycling, compared to only one in five among other participants). Academics were more likely than others to say they did not know.

Barriers and enablers, by organisation

Participants from government organisations outside London were particularly likely to say that funding/financial barriers were the most important (48.2% vs. 36.3% across the sample as a whole).

Participants from governmental organisations in London were particularly likely to list public opposition as one of their top three barriers (55.8% vs. 27.1% across the sample as a whole).

Participants from governmental organisations in London were particularly likely to list business opposition as one of their top three barriers (32.7% vs. 15.5% across the sample as a whole).

Participants from governmental organisations in London were particularly likely to list improved stakeholder engagement as a top three enabler (32.7% vs. 16.7% across the sample as a whole).

These findings are interesting. They could be interpreted as meaning that London has more problems with public and business opposition than other areas. However, another interpretation might be that once financial and funding barriers are (to some extent) overcome, and high quality schemes progressed, this is when opposition starts to appear. The implication of that could be that if other areas are to start building schemes of similar quality and cost to London's, improving stakeholder engagement and ensuring early buy-in could be crucial to mitigating some of the problems that London has experienced, and ensuring that effective compromises where needed are found that (i) address stakeholder concerns but (ii) do not substantially weaken schemes. However, if London's schemes are seen to be successful, this could also help other areas.