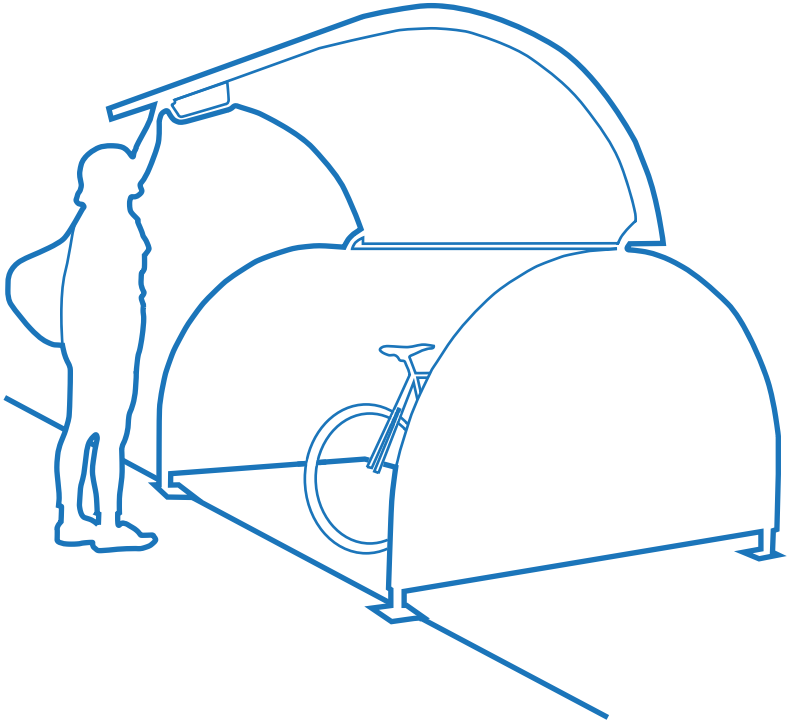
LONDON'S CYCLE HANGARS

An assessment of provision in five maps

April 2022



FARE CITY

ABOUT

Fare City

Fare City is an award-winning London-based think tank and social enterprise. Our mission is to co-create fairer cities through the promotion of more accessible, equitable and sustainable city transport. Our team of built environment professionals uses an evidence-based approach which strives to empower city users to make reasoned mobility choices which are right for them and others.

The authors

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Acknowledgements

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EXECUTIVE SUMMARY

There is an urgent need to provide greater levels of secure residential cycle parking in London. At present, the number of Londoners on a waiting list for a cycle hangar space is nearly three times greater than the current level of provision. The majority of London's 32 boroughs have declared climate emergencies and recognise that a step-change away from polluting modes of transport and towards more sustainable modes is necessary. Empowering Londoners to choose sustainable modes includes ensuring that access to cycling, cycling infrastructure and, especially, secure cycle storage is prioritised.

Despite this urgent need, there are many disparities between the demand, delivery, and cost of cycle hangar space across the capital. It would also appear that other, less sustainable, modes are still being favoured over the cycle. This report identifies why this is and suggests what can be done to address this imbalance. The research is guided by the following questions:

1. **Why does cycle hangar provision vary greatly between London boroughs?**
2. **Why is it more accessible and affordable to park a private car than to rent a secure residential cycle space?**

To help answer these questions, the report draws upon a comprehensive dataset, five interviews with experts and three interviews with public stakeholders. Employing these methods to identify the deeper issues underlying the current situation is instructive in understanding how they may be addressed, and by whom.

The research identifies a range of interdependent factors, from a borough's geography and level of contested space, through to the prevalence of car dependency and political expediency, that contribute to the different profiles of each London borough. How boroughs then choose to leverage these factors to develop and deliver their transport priorities (and to what extent cycling features in this) informs the unique trajectory that each borough positions itself on. The factors that characterise a borough's trajectory are examined in a series of five maps, each telling a story that has enabled the research team to identify the following findings and subsequently make a set of recommendations.

01 Recommendation

Finding 01: Cycle hangar delivery depends on each borough's trajectory

Officer capacity for the implementation of cycle hangars varies greatly among London boroughs. Some borough officers may manage the delivery of cycle hangars as part of a broad transport-based brief, while another borough's officers will be tasked exclusively with the delivery of cycle hangars. From identifying demand for hangars through to installing them on site, the delivery of hangars can be a time-intensive process that boroughs prioritise to differing extents, based on their individual trajectories.

Recommendation 01: Establish a dedicated cycle parking officer role

Fare City recommends that boroughs create an officer role dedicated to the delivery of all types of cycle parking spaces. This represents an intermediary step for many boroughs and would be the most responsive to the specific cycle parking needs of each. Doing so may not only increase the delivery of cycle hangars but also improve their functionality as part of an integrated borough-wide active travel network.

02 Recommendation

Finding 02: Demand for cycle hangars could be better managed

Managing the demand for cycle hangars could be improved among London boroughs. Boroughs with low levels of demand should aim to generate and then nurture sustained levels of higher demand, whereas boroughs with high levels of demand should aim to manage demand more effectively. While installing new hangars to meet demand is preferable, existing hangar provisions could be made to work more efficiently by freeing up underutilised spaces and encouraging active occupancy.

Recommendation 02: Make cycle hangar rental schemes more equitable for residents

Fare City recommends that cycle hangar parking needs to be more equitable to the needs of residents. Currently, annual rental schemes are inflexible and do not incentivise active occupancy. Providing a range of rental options – in line with car parking permits – could help boroughs and suppliers more easily track usage to match those on waiting lists to spaces. Furthermore, boroughs and suppliers should commit to serving the needs of those with non-standard cycles, not only to meet existing demand but also to generate and nurture new demand.

03

Recommendation

Finding 03: Car dependency is embedded in London boroughs

The long-established cycle between car dependency and electoral votes at a local government level must be broken. The extent to which this cycle manifests itself is evident by the inequity of the cost of a cycle hangar space versus that of a car parking space in the majority of London boroughs. It is the responsibility of car-dependent boroughs to alter their current trajectories by facilitating the shift to more sustainable modes of transport. Boroughs should aim to incentivise active travel and disincentivise car use by working closely with other boroughs. Leveraging shared infrastructure, while adopting – and adapting – best practices specific to the borough's needs should be prioritised.

Recommendation 03: Develop and communicate a strategic vision for cycling

Fare City recommends that boroughs should aim to make cycling specifically, and sustainable travel more broadly, a vote-winning issue. Developing a strategic vision that aspires to communicate the equitable, economic, and environmental benefits of cycling and aligning these with residents' current and future transport needs, is fundamental to encouraging cycling uptake - as is redressing the current imbalance between cycle and car parking costs. Setting and attaining tangible targets will help boroughs to communicate their progress and may strengthen their mandate for further measures.

INTRODUCTION

Access to secure residential cycle parking is a pertinent issue for city dwellers across the globe. In London, the UK capital, this issue has reached a critical juncture, with demand for an on-street cycle hangar space nearly three times greater than the current provision. Viewed in isolation, this may not appear significant, as cycling currently only equates to approximately 3.4% of journeys in the city – much lower than either private transport (42%), walking (33%) or public transport use (22%).[01] However, long-term crises including climate change[02] and the lack of affordable housing – coupled with shorter-term pressures, such as the pandemic and cost of living – mean that city authorities have to prioritise cycles and the infrastructure needed to enable cycling to become a more accessible, equitable and sustainable choice for all Londoners.

Although cycling levels across the whole of London are increasing, many Londoners are discouraged from cycling, owing to a lack of residential cycle parking.[03] This situation is especially pronounced in inner London boroughs, where many Londoners living in flats and terraced houses are unable to securely park a cycle at street level. Of the several types of residential cycle parking options available, this report focuses specifically on cycle hangars. First introduced to the streets of London in 2011,[04] cycle hangars are typically positioned in an existing car parking space, with individual units comprising an enclosed key-operated shelter that can store six cycles or two non-standard cycles. Though over 3,500 cycle hangars have been installed across London, demand is outstripping supply.[05]

Local authorities are at the forefront of redressing this imbalance. To date, 28 of London's 32 boroughs have declared climate emergencies: initiatives, along with climate action plans and targets, which task boroughs with achieving net zero by dates ranging from 2025–2040.[06] A key London-wide programme is to halve the number of petrol and diesel road journeys,[07] an ambitious, but achievable, target, given that boroughs are collectively responsible for 95% of the capital's roads.[08] Empowering and enabling Londoners to use sustainable modes – including cycling – in favour of polluting vehicles is fundamental to this target being realised.

London boroughs are not acting alone: the UK government's Transport Decarbonisation Plan calls for 50% of all journeys in towns and cities to be walked or cycled by 2030,[09] while London's mayor, Sadiq Khan, aspires to 80% of all trips in the capital to be walked, cycled, or completed using public transport by 2041.[10] Leading Transport for London (TfL) is London's mayor, who has the mandate to deliver 5,000 cycle hangars – five a day – by May 2024. While current levels of delivery do not appear to meet current demand, this is only part of the problem. Of equal concern is accessibility to – and the affordability of – cycle hangar spaces, which vary significantly across the city.

This report seeks to take an initial step towards identifying and understanding the key issues associated with cycle hangar demand and delivery in London. Drawing upon a comprehensive data set that considers a range of interdependent metrics, each of the report's five maps seeks to lay bare the complexities and contradictions of cycle hangar provision in the capital. A small cohort of interviewees offers a range of both expert and public insights, which, when examined alongside the data, provide the basis for the report's conclusions and subsequent recommendations. The project's open-source dataset alongside the project infographics, report, and vox pop video interviews are designed to provide policymakers, researchers, campaigners, and Londoners themselves with the means to progress this initial research for the purposes of improving access to cycle hangars across London.

METHODOLOGY

The project employs a triangulated research methodology. Quantitative data, comprising numerical metrics, was obtained and compiled into a dataset using Freedom of Information (FOI) requests sent out to each of London's 32 boroughs (excluding the City of London Corporation). Of the FOIs sent out, 31 boroughs responded. Additional metrics were obtained using other publicly available data; the source details for all data metrics are referenced in the dataset (see the link to the dataset in the report references). Qualitative data, comprising stakeholder insights, was obtained using both long-form semi-structured interviews and short-form structured interviews.

The quantitative data was obtained via FOI requests received between October 2021 and March 2022. All other data referenced from the dataset was accurate, to the best of Fare City's knowledge, as of 28 March 2022. Though some boroughs additionally provided cycle hangar delivery projections for the six months after FOIs were returned, these could not be verified and have not been included in the report.

The qualitative interviews were conducted in March 2022 and feature five semi-structured interviews and three structured interviews. The semi-structured interviews were conducted online with a range of project stakeholders, including two officers responsible for cycle parking in two different London boroughs (one inner and one outer); two UK-based cycle hangar suppliers; and two interviewees from an inner London borough cycling campaign organisation. The structured interviews were conducted in person and included three members of the public who reside in two separate London boroughs. These three interviewees are either on a cycle hangar waiting list or have space in an on-street cycle hangar.

This mixed methods research approach was selected for two reasons: First, establishing a baseline of quantitative data is a key project output that can be used to help identify trends in response to the two research questions. The publication of the dataset as an open-source resource is to enable others to use the data to progress the report's findings and recommendations. Second, the use of qualitative interviews is designed to provide the research team with a greater level of understanding of emerging data trends and to expand upon key lines of enquiry that the research team developed using secondary desk-based research.

MIXED METHODS RESEARCH

31

FOI RESPONSES RECEIVED

5

SEMI-STRUCTURED INTERVIEWS CONDUCTED

3

STRUCTURED INTERVIEWS CONDUCTED

AN ASSESSMENT OF PROVISION IN FIVE MAPS

Setting the scene

In London, the disparity between cycle hangar demand and cycle hangar delivery is stark (Fig. 01). The demand for cycle hangars across London boroughs is nearly three times higher than the current number of total spaces. Recent TfL data shows that cycling has grown in popularity across all communities, with 27% of Londoners having cycled within the last 12 months (2020–21). The same data shows that 'a lack of secure cycle storage can be a particular issue for low-income people'.[11] While this is undoubtedly true and is an issue in and of itself, the challenges associated with secure residential cycle parking are city-wide and impact all types of Londoners.

LONDON: CYCLE HANGAR SPACES - CURRENT PROVISION & UNMET DEMAND

SOURCE: FARE CITY, DATA OBTAINED BETWEEN OCTOBER 2021 AND MARCH 2022

Figure 01:

The COVID-19 pandemic accelerated the use of the cycle in cities across the world; in London, city users were discouraged from using public transport and encouraged to travel outside in a socially distanced manner.[12] However, a new international crisis is, in part, contributing to an emerging domestic one – namely, the cost of living. A sharp rise in the cost of living is underpinned by the highest levels of inflation since 1992, an energy price cap lift, and increased rates of national insurance. This is compounded by London-wide issues, with TfL recently announcing that its fares would rise by nearly 5% – the biggest increase in a decade – because of a lack of funding.[13] Collectively, these issues are set to squeeze households and may necessitate that Londoners make changes to their daily lives – including how they travel. Choosing more inexpensive modes, such as walking and cycling, may see levels of cycling increase further.

While the provision of cycling infrastructure was advanced by the pandemic, two decades earlier, London's first mayor, Ken Livingston, was the first of three mayors who aspired to incrementally plan for – and provide – secure cycle parking,[14] while Boris Johnson continued with targets to increase cycle parking across London.[15] In his first term, the incumbent mayor, Sadiq Khan, published the Mayor's Transport Strategy (2018), which outlined the need to 'provide more secure, accessible cycle parking, particularly in residential areas' with a particular focus on ensuring that 'secure cycle parking and storage must be built into all new developments'.[16]

Supporting policy documents include TfL's Cycling Action Plan (2018) and Cycle Parking Implementation Plan (2019), the latter drawing attention to the importance of residential cycle parking: 'For cycling to be a viable option for Londoners, people must be able to securely and conveniently store their cycles at home… for existing housing stock, secure on-street cycle parking provides sheltered places for people to park their cycles outside their homes'.[17] Similarly, the London Plan (2021) targets a 'positive trend in the provision of cycle parking' by 'securing the provision of appropriate levels of cycle parking which should be fit for purpose, secure and well-located'. This also includes minimum cycle parking standards for new residential developments.[18]

The mayor's policy pledges have been backed up by funding, as in 2019/20 when £3.5 million was invested with the aim of delivering 7,800 new cycle spaces (all types) across 30 London boroughs.[19] While TfL investment and London-wide targets are important, it is London boroughs that are responsible for converting this funding into cycle hangar spaces. Excluding manufacture and disposal, overall costs for a cycle hangar comprise two elements: purchase and installation costs, and management and maintenance costs.

TfL funding is employed for the purchase and installation costs of cycle hangars. TfL works with London boroughs, helping them to approve and fund their Local

Implementation Plans (LIPs), which set out where the demand for cycle hangars is, how many units will be required and where they will be located. Additional TfL funding for cycle hangars can also come from sources such as Liveable Neighbourhoods programmes and other specific active travel-related funding allocations. This enables boroughs to access a share of TfL's cycle parking funding to purchase cycle hangars, which retail at approximately £2,500 each. However, competition among boroughs is high, while TfL's finances are precarious, meaning future cycle parking funding is far from certain.

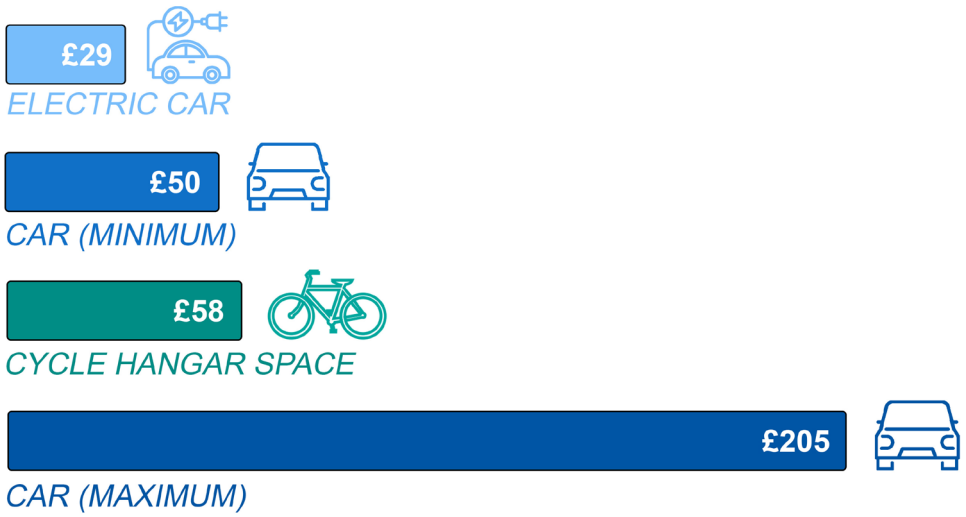
Fortunately, boroughs do have other revenue streams to call upon, though their ability to do so varies according to conditions unique to the borough. Levies can be raised on developers via either Section 106 agreements or community infrastructure levies (CILs), while boroughs can raise revenue from members of the public via measures such as parking penalty charge notices (PCNs). Designated funding from the central government for specific departments (e.g. highways) may also be used towards the cost of purchasing cycle hangars.

Of greater complexity is how boroughs finance the management and maintenance costs of cycle hangars. Interviews with cycle hangar suppliers confirmed that the prices charged to boroughs vary from £35 – £72 per cycle hangar space. One supplier, Cyclehoop, currently manages around 2,000 of London's 3,525 cycle hangars (57%) and charges most boroughs a flat fee of £72 per space. The interviews also confirmed that there are three types of management models that boroughs employ, regardless of who the supplier is.

The first model entails passing on the supplier's costs directly to the resident; the second is for the borough to subsidise the management cost themselves and charge the resident a lower price; and the third is to pass the management cost on to the resident along with an uplift, thereby increasing the cost of the space. Though some boroughs have taken their cycle hangar management in-house, the cost for managing and maintaining the space is likely, at least initially, to be informed by the supplier's management cost.

In London, on average, it costs more to park a cycle in a hangar than it does to park either a private electric vehicle (EV) or some types of private cars with an internal combustion engine (ICE) on a borough road (Fig 02). This finding is borne out by the themes identified in Map 04 and not only highlights London's embedded dependency

LONDON: AVERAGE PARKING PERMIT COST BY MODE



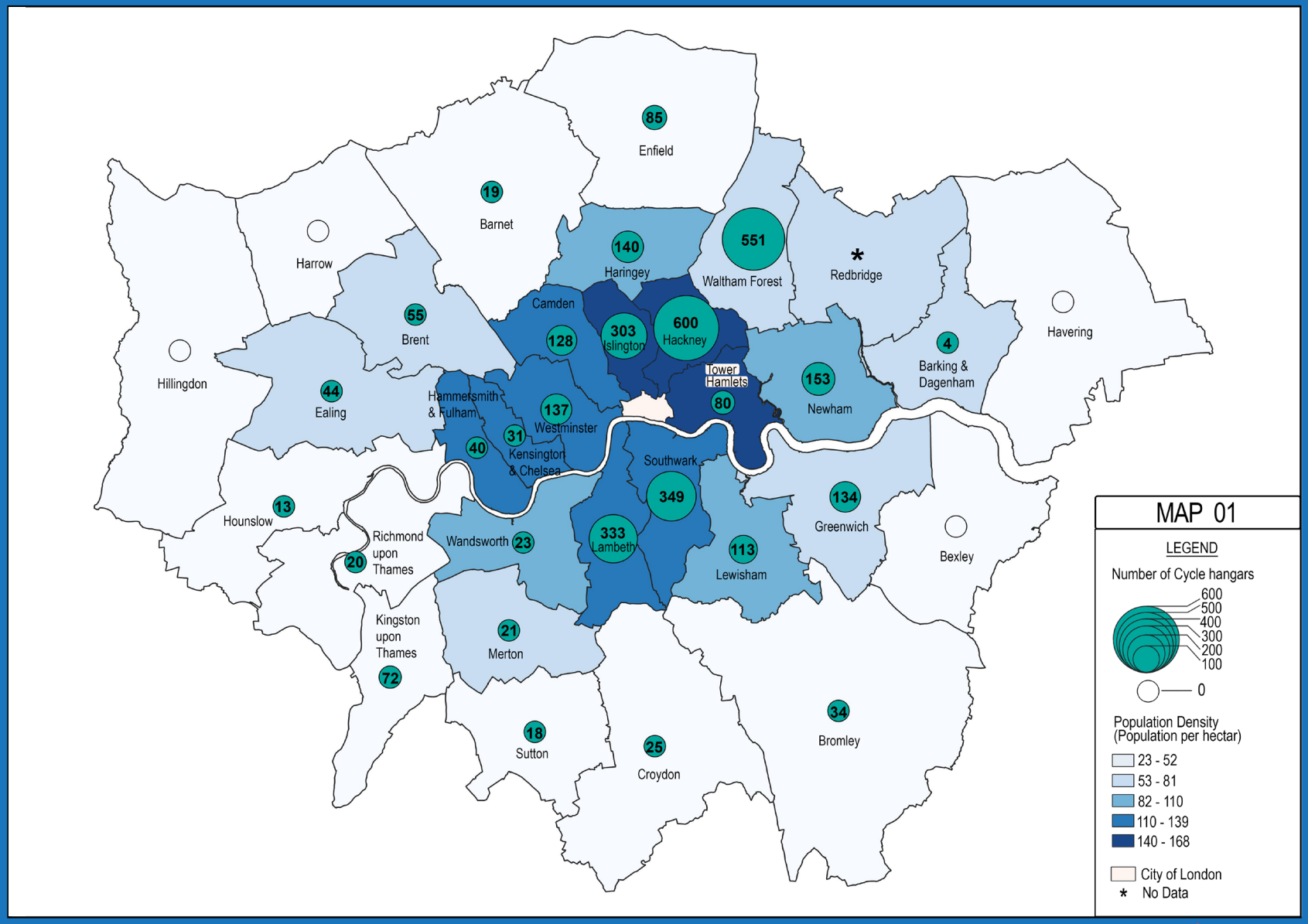
SOURCE: FARE CITY, DATA OBTAINED BETWEEN OCTOBER 2021 AND MARCH 2022

Figure 02:

on cars but the political sensitivities associated with charging for car use in relation to other modes. The three hangar management models employed by boroughs are, in part, related to this and are another determining factor in setting the final cost a resident will pay for a space.

As the following five maps demonstrate, cycle hangar provision across London boroughs is a complex and nuanced issue, with a myriad of factors collectively contributing to the profile of individual boroughs. This profile is instructive in identifying the overarching theme in response to the reports' two research questions, namely the different trajectories of each borough. Some interviewees suggested that optimum cycle hangar provision is dependent on where individual boroughs are on their journey. This is in part true; however, this is based on the understanding that all boroughs are aspiring to reach a similar destination. The research shows that this is not the case, and it is perhaps more accurate to understand each borough as travelling along its own trajectory, not only in regards to delivering cycle hangar provision but also which modes of transport it prioritises, and why.

LONDON BOROUGHS: NUMBER OF CYCLE HANGARS TO POPULATION DENSITY



Source: This data has been obtained between October 2021 and March 2022 from London Boroughs via Freedom of Information requests and https://data.london.gov.uk/dataset/land-area-and-population-density-ward-and-borough
The corresponding dataset can be found on the Fare City website: https://farecity.org/research/
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FARE C-I-T-Y

3.1

MAP ONE

As this map shows, there is an emerging trend between borough population density and cycle hangar provision.[20] Two of the three most densely populated boroughs, Islington (second densest) and Hackney (third densest), are adjacent and have among the highest levels of hangar provision in the capital. Similarly, south of the river, Lambeth (fifth densest) and Southwark (ninth densest) have a comparable number of cycle hangars, as do neighbouring boroughs Ealing and Brent, in the west of the city.

A possible explanation is that population density is linked to the geography and development patterns of neighbouring boroughs, including public infrastructure, street layout, and types of housing stock. In turn, the demand for hangars may reflect the inability to store cycles within the curtilage of a property – for example, a mid-terrace house opening directly onto the street or a block of flats with no existing secure cycle space provision. This is supported by Cyclehoops founder and design director Antony Lau, who confirms that the highest levels of demand for his company's hangars are "definitely places where there's terraced housing and flats". An additional factor may be the degree to which public space is contested, both in terms of the public realm (i.e. appropriation of a car parking space) and existing building stock (i.e. communal space in a housing estate).

While the map shows trends linking population density to cycle hangar provision, there are also anomalies. Tower Hamlets has a low number of cycle hangars, despite being the capital's densest borough. The report research confirmed that while there are only 480 cycle hangar spaces in the borough, there are over 500 individual cycle lockers, the majority of which are located on residential estates.

The blended provision of secure cycle parking in Tower Hamlets suggests that certain types of parking are best suited to certain types of housing stock, with individual lockers proving popular on housing estates, given the extra level of security provided over communal hangars. The management of housing estates can also influence demand for secure cycle parking, with some providers taking a zero-tolerance policy on ensuring cycles are not kept in communal areas[21] since the London Grenfell Tower fire in 2017. Another anomaly is Waltham Forest, an outer London borough; although it is the fifteenth-most densely populated borough, it has delivered the second-highest number of cycle hangars behind Hackney.

Simon Capper, a cycle parking borough officer, states that despite rising numbers of flat conversions and housing developments, hangars have gone onto estates, but "the uptake just hasn't been there". This is despite Waltham Forest's ability to successfully nurture demand for secure cycle parking, as demonstrated by its high cycle hangar provision relative to its median population density. Capper is hard pushed to explain why this may be the case but considers that the issues surrounding secure cycle parking in London are more nuanced than demand and delivery alone, citing a lack of affordable housing as being a "massive contributor to the fact that we need bike hangars". A catalyst for increasing both demand and the delivery of cycle infrastructure in Waltham Forest is undoubtedly its pioneering Mini-Hollands scheme, which began in 2013.[22] Almost a decade on, the borough has rolled out a range of high-quality active travel infrastructure from Low Traffic neighbourhoods (LTNs) to cycle hubs and protected cycleways.

Generating demand for increased levels of cycling and delivering cycle hangars to satisfy this need is dependent on boroughs setting a clear strategic vision of what they want to achieve and how. Working towards this vision requires a strong policy platform and sustained levels of investment in funding, resources, and political support. Boroughs that can deliver high levels of hangars in response to demand are typically able to leverage these attributes to help them establish and run lean delivery-focused operations. Jeremy Green, the managing director of Falco, a bike hangar supplier, considers that the boroughs delivering the highest number of hangars, "the Hackneys, Waltham Forests and Islington's… have established capable operations".

Though many boroughs aspire to deliver greater levels of active travel infrastructure, borough policy and its transport agenda can be ambiguous or even contradictory. Though Islington is London's second-densest borough, it has the fifth-highest number of cycle hangars and the lowest number of licenced cars.[23] Cycle Islington campaigners Eilidh Murray and Steve Knatress consider that borough policy actively incentivises car use. "There's the Islington resident roamer scheme where anyone with a permit can park anywhere… between 11 am and 3 pm, which encourages short journeys". Instead, Knatress would welcome a "policy where residents' parking

is reduced by so much each year…so there's actually a figure you can look at". While setting tangible targets may be politically undesirable, it would perhaps provide added impetus for boroughs striving to increase levels of delivery.

Both obtaining and retaining experienced officers for dedicated roles provides a level of continuity and is hugely advantageous in ensuring consistency of delivery in line with target-driven briefs. Providing officers with a mandate to deliver is often the result of hard-won battles by council members and can be a vote winner, yet it can also carry appreciable risks, as relayed by Simon Capper: "...delivery wins votes… so there's a lot more pressure to deliver hangars". Political will was cited by all interviewees as being paramount to setting and delivering upon this strategic vision; Falco's Jeremy Green considers that boroughs would benefit from having a designated active travel champion – someone with the ability to provide strategic focus, manage opposition, and achieve goals.

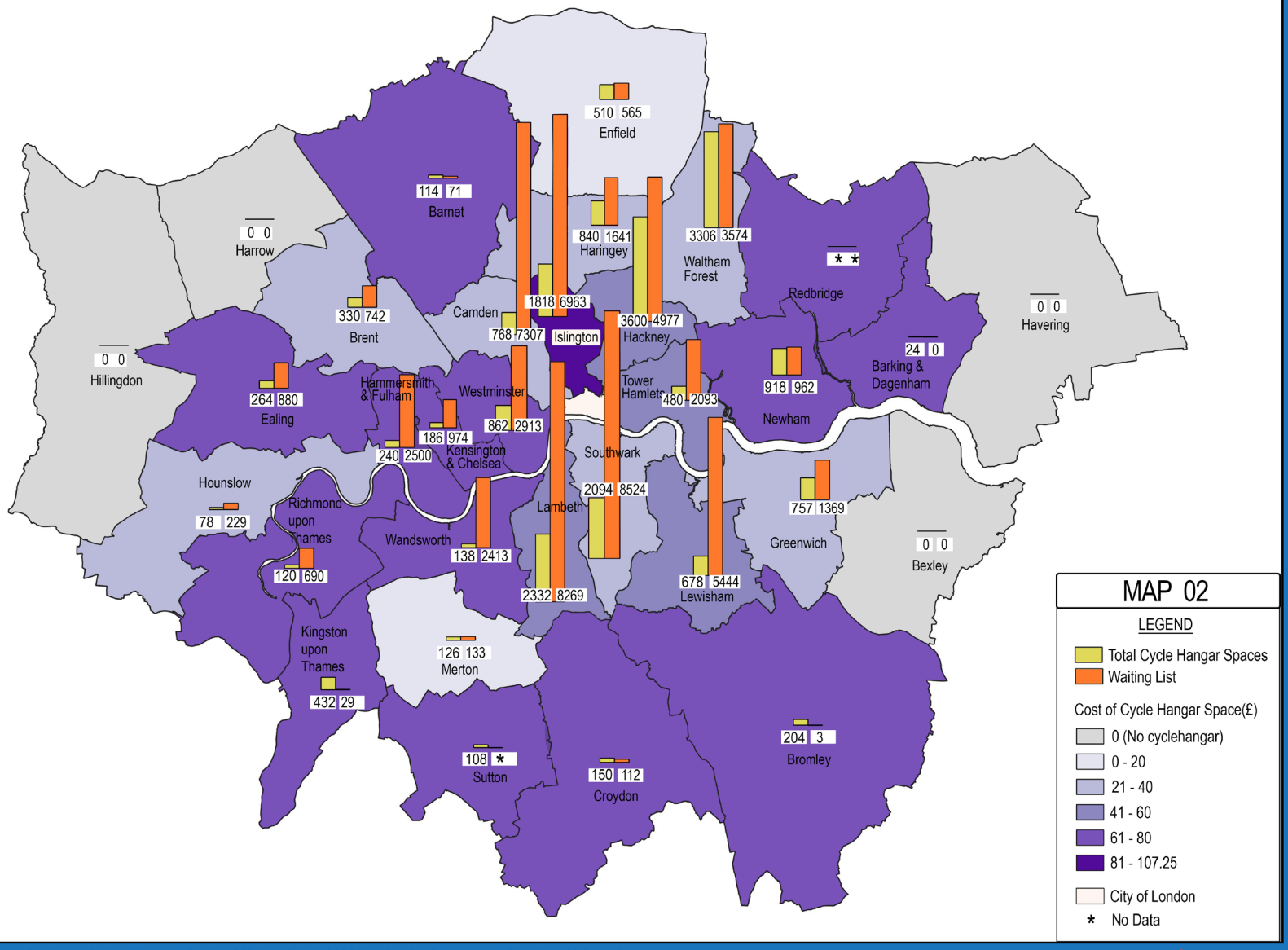
Though high-profile individuals will commonly win the mandate, it is borough officers who are tasked with delivery. These are individuals who according to Green are often undersupported and overwhelmed: "you've got one person who's stretched… bike hangars (or even cycle parking in overall) are often only one small part of their portfolio". Waltham Forest's Simon Capper agrees: "most boroughs have a cycling officer wearing many different hats". Both interviewees consider that aside from a borough's internal environment, the external environment could be more conducive to increasing delivery. Capper states "you have 32 different boroughs doing things 32 different ways… it makes no sense", whereas Green believes that TfL should "have a dedicated bike hangar department… which coordinates and provides strategic support for London-wide delivery".

SUSANNE // ISLINGTON

"I use my cycle every day to go everywhere...I rarely use public transport and don't have a car. I store it outside my house with three expensive locks and hope for the best."

Image source: *Fare City*

LONDON BOROUGHS: CYCLE HANGAR SPACE COST TO CURRENT PROVISION & UNMET DEMAND



Source: This data has been obtained between October 2021 and March 2022 from London Boroughs via Freedom of Information requests
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FARE C-I-T-Y

3.2

MAP TWO

Map 02 breaks down cycle hangar provision by the number of cycle hangar spaces and compares this with demand in the form of the number of residents on each borough's waiting list. An initial observation is that the four boroughs with the highest demand (ranging from approximately 7,000 to 8,500 residents) are not only situated in inner London, but lie in pairs adjacent to one another. Furthermore, the levels of demand in neighbouring boroughs are very similar: 7,307 and 6,963 for Camden and Islington, respectively, and 8,269 and 8,524 for Lambeth and Southwark, respectively.

Interestingly, though these four boroughs represent three separate price ranges per space, three of the boroughs, Camden (£36), Southwark (£40) and Lambeth (£42), are only separated by £6, with an average cost of £39.30 per space. This is one third (32%) below the London average cost of £58. The fourth, and most expensive, borough, Islington (£107.25), charges over two and half times the average of the other three boroughs and approximately 45% more than the London average.[24] Islington, like other boroughs, has taken the management of its hangars in-house; however, unlike other boroughs, it has elected to adopt the third of the three management models: to pass the management cost on to the resident along with charging an uplift, thereby increasing the cost of the space.

Both the merits of Islington's management model, along with a more extensive analysis of the different factors that inform how much boroughs charge for cycle hangar spaces, can be found via Map 04 'London boroughs: cost of cycle hangar space vs cost of residential car parking permit'. Instead, the analysis of this map seeks to understand the relationship between demand and cost and suggests ways in which greater demand-side efficiencies can be made.

Both sets of suppliers stated that one of the most obvious drivers of demand is greater awareness – a result of seeing more hangars on the ground. Cyclehoops' Antony Lau quotes the well-known adage "build it and they will come" and states of Cyclehoops-managed hangars that there is a 96% occupancy rate in some boroughs. Simon Capper reports that in Waltham Forest "we can't build them [cycle hangars] quick enough", such are the levels of demand.

Though installing cycle hangars can generate a certain level of demand, there are other external factors that drive demand, such as density, levels of cycling and cycle theft rates. Allied with this are internally derived factors that relate to how effectively demand is managed, at all stages of the process, from accurately identifying demand through to how the hangars themselves are managed.

Accurately identifying demand necessitates the collection and analysis of robust data, which requires a certain amount of borough-side capacity and expertise. Good data not only helps boroughs to select the most appropriate locations to best meet this demand but can also help boroughs to apply for, and gain, TfL funding for the purchase and installation of hangars. As the map shows, some boroughs (Kingston-upon-Thames and Bromley) have high total cycle spaces relative to the number of residents on their respective waiting lists. This may either suggest that these boroughs have successfully met existing levels of demand, or that while existing demand has been successfully met, no further demand has been generated.

A look at both Waltham Forest and Hackney suggests that demand and delivery are more symbiotic, with good levels of delivery responding to healthy levels of demand. Simon Capper stated that in Waltham Forest it took almost a year of engagement to reach a 'critical mass' of demand to know that a cycle hangar is going to be well used. Similarly, Cyclehoops' Antony Lau reported working with a borough for a while as "they struggled to get demand high enough in certain locations". Clearly, generating demand is critical in gaining initial funding, while nurturing demand is important in helping to increase cycling levels. Another stage in the demand management process is setting an optimal price point, which can not only impact levels of demand but, more acutely, may contribute to how efficiently hangar spaces are used.

If the price for hangar space is too low, there is a danger that spaces will be held as opposed to actively used, as described by Cyclehoops' Antony Lau: "once you have it you don't give it up… because it's cheap you just keep paying for it… that's balanced by charging the right amount". This was supported by Simon Capper, who considered that setting a "reasonable amount" is important for "discouraging people who are just using it… to store a bike". Though Lau reports that some of the Cyclehoop-managed hangars have high occupancy rates, this does not necessarily reflect how often these spaces are used. Though there is no available data, different interviewees suggested that there are varying levels of active occupancy, with Cycle

Islington campaigner Steve Knatress reporting of "bikes [that] have been locked there for six months and they've never moved".

The management of existing provision is, potentially, one area that could be improved by leveraging latent hangar space to maximise active occupancy, thereby improving efficiency and cutting into the resident waiting lists of respective boroughs. To this end, it is not just cost which is a limiting factor – as is clear from the experience of campaigners in Islington, London's most expensive borough – but the management models and administrative costs of both boroughs and suppliers. The report research suggests that management models are, at present, too inflexible and unresponsive to the needs of residents. Cycle Islington coordinator and interviewee, Eilidh Murray, not only felt that Islington "need to manage the current stock better" but, unlike the terms offered with a car parking permit, users cannot get a refund on a cycle hangar space if they move out of the borough – or even move to another location within the same borough.

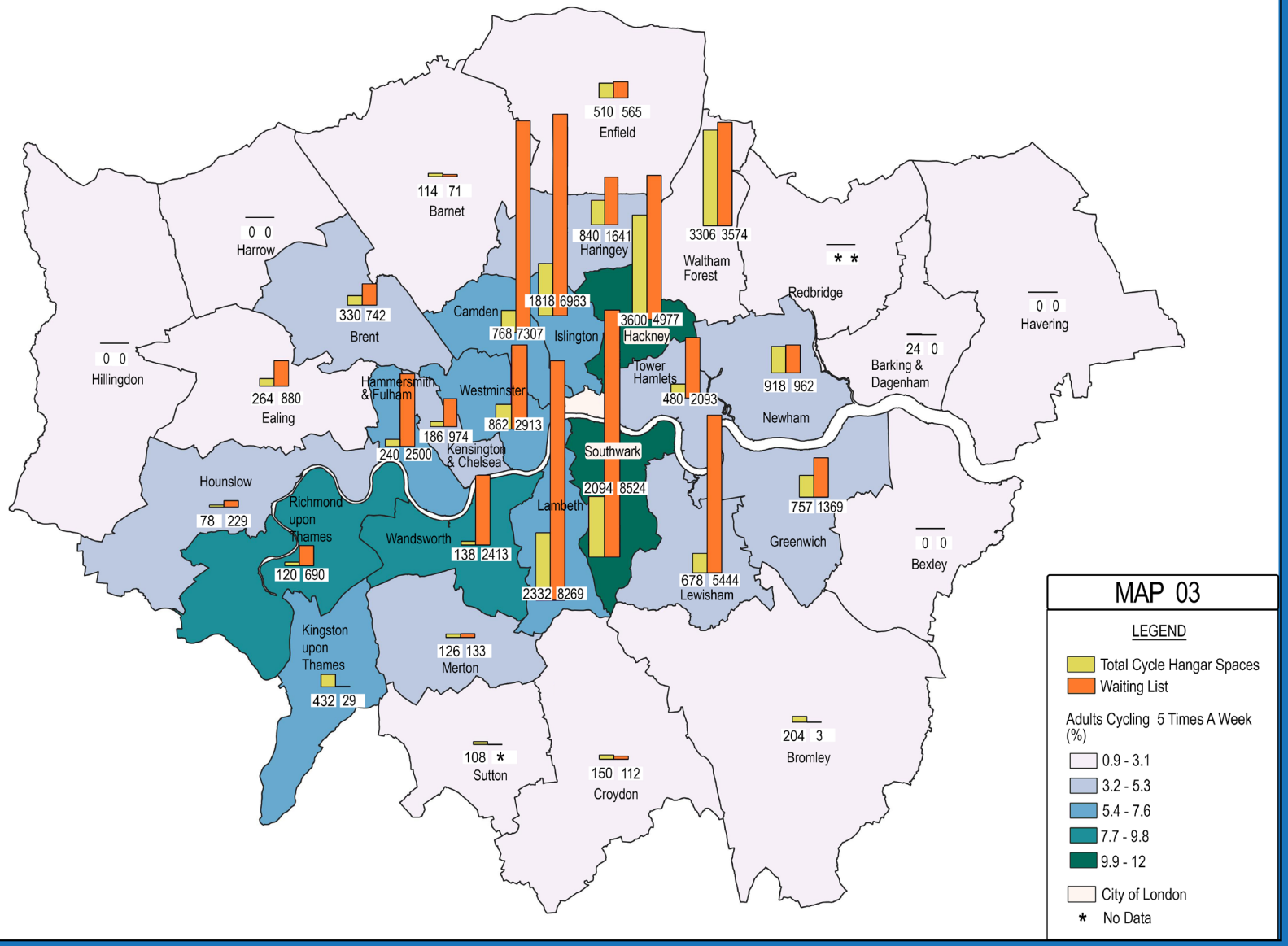
When asked about the need for greater flexibility, Cyclehoops' Antony Lau stated that although some councils had requested that residents be able to pay monthly, it was "much easier to administer" spaces on a yearly basis. As is the case in Islington, even hangars that are managed by the borough themselves appear to run inflexible resident schemes with annual rentals, no refunds, and no transfers being commonplace. Though maximising the levels of active usage is one tool that could be used to better manage demand, it still begs the question as to whether this is equitable – especially when compared to how car parking spaces are used. In London, not only are many cars unused for approximately 95% of the time,[25] but some are essentially 'stored' long-term in their parking space at a significantly lower cost to residents than to those who similarly 'store' a cycle in a hangar space.

KERI // SOUTHWARK

"I think the price of a cycle hangar is too low, the price that you pay overall for the yearly cost and the deposit. I think the price can go up... It's in high demand and the price would still be reasonable"

Image source: *Fare City*

LONDON BOROUGHS: ADULT CYCLING LEVEL TO CURRENT CYCLE HANGAR PROVISION & UNMET DEMAND



Source: This data has been obtained between October 2021 and March 2022 from London Boroughs via Freedom of Information requests and https://www.healthystreetsscorecard.london/results/results_outcome_indicators/
The corresponding dataset can be found on the Fare City website: https://farecity.org/research
Map created: March 2022 (Not to Scale) / Contains National Statistics data © Crown copyright and database right 2012 - Contains Ordnance Survey data © Crown copyright and database right 2012

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3.3

MAP THREE

While the provision of cycle hangar spaces is informed by the interdependence of population density, development patterns, and housing stock in many London boroughs (Map 01), there are other factors that contribute to provision. All interviewees considered that levels of cycling are an important driver (shown in this map in the form of the percentage of adults cycling five times per week). As can be seen, boroughs with some of the highest levels of both demand and hangar spaces, such as Hackney and Southwark, also have the highest levels of cycling. Perhaps unsurprisingly, higher levels of cycling are concentrated in inner, as opposed to outer, London boroughs, though TfL data suggest that cycling levels in outer London have increased by 22% in 2020.[26]

There are, however, important variances. Richmond Upon Thames and Wandsworth, for example, experience higher cycling levels than many central London boroughs, but have lower provision and demand for cycle hangars. This may be related to population density and development patterns, especially given that outer London boroughs typically feature a less dense housing stock, with more space to park cycles on private property. This could impact the demand for cycle hangar spaces more than the levels of certain types of cycling. This observation is perhaps reflected by the London Plan's higher cycle parking standards[27] for these types of boroughs, which focus more on cycle parking at retail and office locations rather than in residential areas.

As with Map 01, Waltham Forest appears to be an anomaly. While it has high levels of cycle hangar spaces and demand, its adult cycling levels are consistent with other outer London boroughs in that it ranks in the lowest data range. This perhaps highlights that different usage levels, cycling habits, or daily trip patterns (other than cycling five times a week) could be more prevalent. This is facilitated by diverse active travel infrastructure, which in turn raises demand for hangars. This is confirmed by Simon Capper: "we're progressive, we're building… green links, pocket parks, parklets". Hard infrastructure combined with soft initiatives, including "behaviour change programmes, events that prioritise walking, cycling… all… in conjunction builds up demand on site for bike hangars".

The need to establish networks that are supported by a suite of measures was cited by both Falco's Jeremy Green and Cyclehoops' Antony Lau. Green felt that "the starting point, the journey and the destination are the three integrated elements to any journey" and that "all three need to work effectively to encourage cycling". Lau reasoned that there should be more secure parking for destinations, including train stations, and that "finding a way to connect all the hangars and hubs together" via the use of a key or Oyster card was something his company was working on. A simple tool, the cycle – and cycling – are becoming more sophisticated, as evidenced by the advent of e-bikes, which are bringing higher-value cycles to a wider demographic, and with it the need for additional security.

E-bikes, cargo bikes and other non-standard cycles, such as trikes, recumbents and handcycles, all demonstrate the broad applications of cycles and the diverse user groups who utilise them. Both providing for and anticipating the future needs of different groups have been brought into sharp focus with the publication of the government's cycle infrastructure design guidance document, LTN 1/20.[28] Using this guidance, inclusive cycling charity Wheels for Wellbeing's 'Guide to Inclusive Cycling'[29] outlines parking requirements for non-standard cycles, ranging from half-height stands to retrofitted and bespoke cycle hangars. Green and Lau confirmed that their respective company's existing hangars could be adapted to fit two non-standard cycles, while both stated that they were also developing custom models.

One such model was commissioned by Waltham Forest in response to a specific request from a resident. Simon Capper confirmed that ultimately the cycle hangar was not realised, with a low-rise extended Sheffield stand being installed instead. Capper cited a lack of funding as being directly tied to a lack of demand "[suppliers]…won't do anything until it's commercially viable…and maybe I'm getting one request every six months". Despite this, he believed that demand "is increasing, but it's just not there yet".

While funding for cycle infrastructure is often delivered piecemeal, some London boroughs have benefitted from substantial cash injections to deliver ambitious active travel schemes. TfL's 2013 Mini-Hollands programme provided three outer London boroughs, Waltham Forest, Enfield and Kingston-upon-Thames, with £30 million each to develop Dutch-style neighbourhoods to promote cycling and reduce car dependency.[30] The programme acted as a catalyst for the boroughs to deliver the

highest number of cycle hangars among outer London boroughs, while Waltham Forest delivered the highest total length of protected cycle track as a percentage of borough roads of all London boroughs.[31]

Since then, London has seen similar investment through rounds of TfL's Liveable Neighbourhoods programme, as part of the healthy streets approach, funding boroughs for long-term schemes that encourage walking, cycling and the use of public transport.[32] This perhaps highlights the importance of being able to access enough funding to develop long-term strategic visions that prioritise infrastructural provision, including cycle hangars.

The report interviews suggest that there is a strong interdependency between cycling levels and infrastructure (e.g. TfL's strategic cycling network), which flows across permeable borough boundaries and not only influences cycle parking demand and provision (see Map 02), but may, in fact, work to induce demand in certain localities.

Local authority officers and campaigners described how cycling levels and infrastructure in neighbouring boroughs can influence the demand from residents and result in the delivery of further active travel infrastructure, such as LTNs and cycle hangars, in areas in proximity to borough boundaries. Islington's Steve Knatress observed that there are some large LTN's in the south of the borough,[33] while fellow interviewee Eilidh Murray considered this was "linked to the fact that the south of the borough was linked to Camden and Hackney".

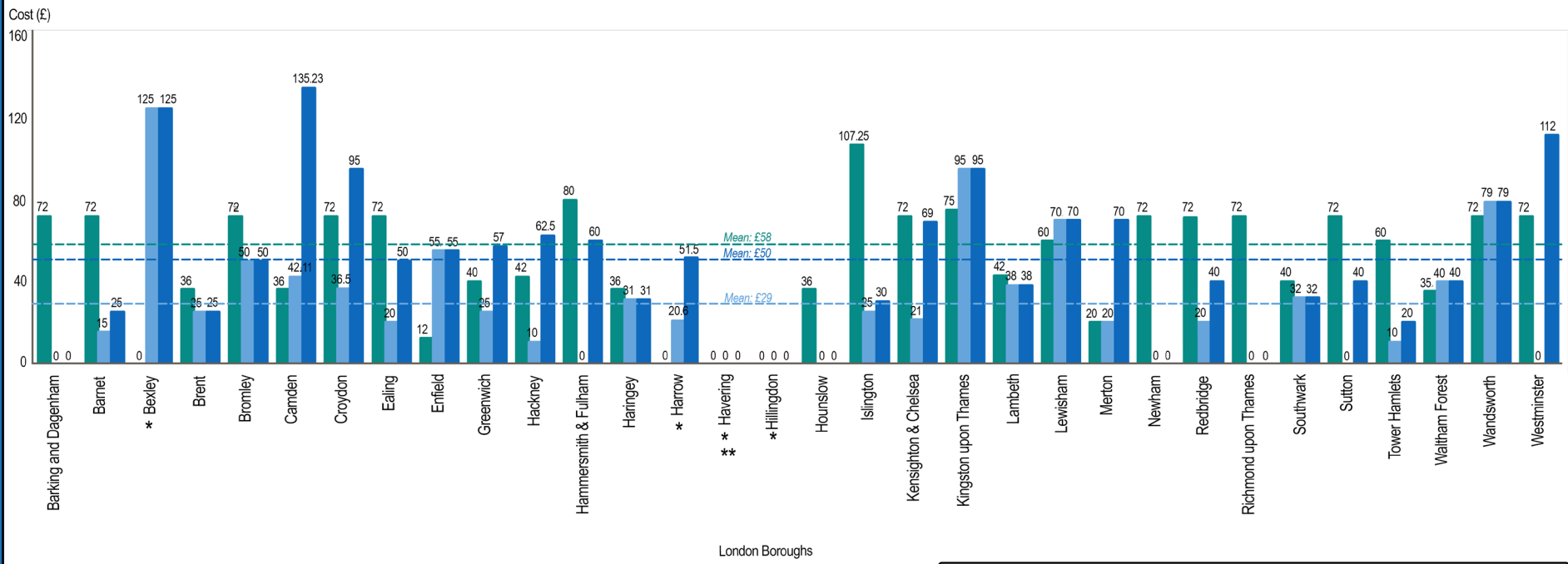
London's shared cycle infrastructure includes the city's many cycle hire schemes, which are in effect boundaryless and may account for a percentage of the cycling levels presented on this map. TfL's docked Santander cycles logged a record number of hires in 2021: 10.9 million, up from approximately 10.5 million in 2018,[34] while dockless cycle operators, including Jump (Uber) and Lime, form part of a transport disruptor movement that has grown globally in the last decade to include e-scooters. Though welcome, London's e-scooter trials may lead to even greater pressures on an already contested public realm, as geofenced parking bays may present yet another issue for residents and boroughs to contend with when considering installing cycle hangars

EVELINE // SOUTHWARK

"I've been storing it [my bike] in a bike hangar in Southwark… Five minutes from where I live for the last month. I've noticed there are a lot more hangars, every time I walk down the street, there's definitely an increase in bike hangars."

Image source: *Fare City*

LONDON BOROUGHS: COST OF CYCLE HANGAR SPACE VS COST OF RESIDENTIAL CAR PARKING PERMIT



MAP 04

LEGEND

- Cost per cycle hangar space (£)
- Cost of minimum residential non diesel car parking permit (electric) CO_2 level is 0 (£)
- Cost of minimum residential non diesel car parking permit CO_2 level minimim/lowest cost (£)
- * No cycle hangar
- ** No car permit data available on website without resident ID

Source: This data has been obtained between October 2021 and March 2022 from London Boroughs via Freedom of Information requests and collected through each borough's website.
The corresponding dataset can be found on the Fare City website: https://farecity.org/research/
Map created: March 2022

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3.4

MAP FOUR

Map 04 illustrates the clear disparity between the cost of a cycle hangar space compared to the cost of a car parking space in the majority of London boroughs that provide hangars. As can be seen, in 21 out of 28 boroughs (75%) it is cheaper for a resident to park an electric car (EV) on a borough road than it is to park a cycle in a cycle hangar. The map also shows that it is cheaper to park a car with an ICE with the lowest CO2 emissions/lowest rate than to park a cycle in a cycle hangar in 17 out of 28 boroughs (61%).[35]

This highlights two areas of investigation. The first is the reasons associated with the cost of a car parking space and the second is the reasons associated with the cost of a cycle hangar space, which to some extent is related to the first. The research interviews suggest that boroughs are reluctant to increase the cost of a car parking permit. This may not only highlight the varying levels of car dependency between different London boroughs but may also expose the political sensitivities around an issue broadly considered to be electorally contentious, as relayed by one borough officer "it's votes, purely votes… councillors won't touch it [car parking permit prices] with a bargepole".

The map suggests that car dependency is prevalent in London. Some boroughs recognise that a transition to EVs is preferable over a continuation of ICE vehicles, and have subsidised the cost of an EV car parking as a result. Approximately half (49%, 15/31 boroughs) position the cost of parking an EV below that of an ICE vehicle, with three of these boroughs charging residents nothing to park an EV. However, taking the 15 boroughs that have a lower cost for an EV parking space, 12/15 (80%) still charge *more* for a cycle hangar space. Of these 12 boroughs, six are inner London boroughs, with all six occupying the lowest eight places in the dataset, recording households without a car.[36]

In the broadest terms, subsidising an EV means reducing the cost of parking a car, as opposed to making it more expensive. While some boroughs may offset low car parking charges in other ways (e.g. high provision of active travel infrastructure), these boroughs are still essentially incentivising (or at least facilitating a continuation of) car dependency. When reviewed against the average number of households in these six inner London boroughs without a car (67% of all residents),[37] the decision to subsidise EV parking below the cost of a cycle hangar space appears inequitable. One borough officer reported that "[the borough] cannot figure out a way, no one I talked to can figure out a way [to increase the cost of car parking]". This would suggest that, for some boroughs, raising the cost of a car parking space is too politically undesirable, regardless of the number of households with a car.

The research interviews suggested that price is only part of the issue. One interviewee conveyed that some boroughs appear unwilling to lose car parking spaces, owing to a lack of political acceptance of it in principle. The same interviewee suggested that this can then impact a borough's ability to install cycle hangars, stating that while some local politicians like cycle hangars, they would not be prepared to install them at the expense of car parking. A reason typically given for not reappropriating parking bays with cycle hangars is that operationally, it costs boroughs much less to maintain a parking bay than a cycle hangar. This rationale was raised by Cycle Islington's Steve Knatress: "[the borough says]… it's costing us to put the Cyclehoop in, but it's not costing us anything, in effect to do the resident parking". This appears to be a popular misconception, as recent research shows that the annual operating cost of an inner London car parking space averages £336.[38]

The extent to which car parking costs inform cycle hangar space costs varies between each borough. Some boroughs will have low (or no) car parking costs and will elect to pass on the cost of the cycle hangar space directly to the resident; some will subsidise the cost of the cycle hangar space just above, or below, the cost of car parking space; while others appear to charge more than the suppliers' cost, resulting in a total cost that may be just above, or below, the cost of a car parking space. How boroughs strike this balance can be attributed to the profile of each borough and how this then informs its unique trajectory.

One borough officer explained that their borough actively kept cycle hangar space costs below the cost of all types of car parking space, "the main one being you can't really charge more than you're charging for a car parking space". By contrast, another interviewee stated that setting hangar space costs below car parking costs should be happening from a policy perspective, and that it was the costs of car parking being too low, as opposed to cycle hangar space being too high, that was the real issue.

Interviewees stated that some boroughs that have acquired more experience in delivering cycle hangars have decided to bring their management and maintenance in-house, including Islington. However, unlike some other boroughs that have done likewise, Islington has not only charged up (as opposed to subsidised down) but has charged a significantly higher amount than the typical supplier-set maintenance fee. This results in the highest cycle hangar space cost in London at £107.25 – 45% more than the city-wide average of £58. However, as the borough's website explains, 'the money raised from secure cycle rental pays for more secure cycle parking in Islington'.[39]

While this self-funding model and associated cost for a space divide opinion, Cyclehoops' Antony Lau suggested that Islington's long-term approach may pay dividends for the borough as it positions itself to become less dependent on TfL funding by increasing its own ability to deliver hangars. The model aspires to offer a sustainable alternative for providing the necessary levels of provision to meet growing demand. Despite the high hangar space cost, it would appear residents are undeterred, given the number of applicants on the waiting list. However, questions concerning how equitable this approach is were raised by several interviewees. To put this into context, it could cost a family of five over £500 per year to park their cycles, while a non-electric car could be parked for as little as £30.[40]

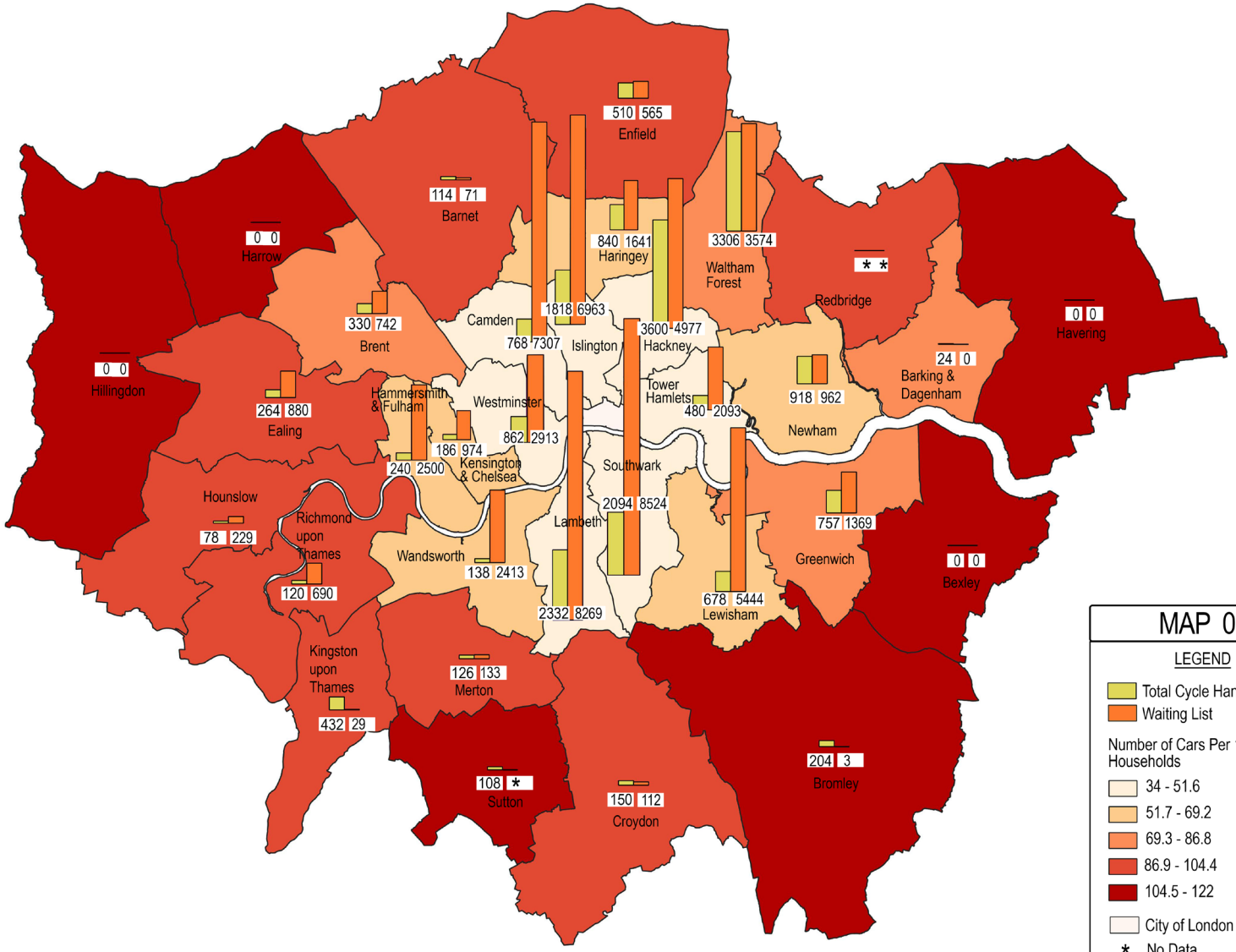
What constitutes an affordable price for a cycle hangar space is, to some extent, dependent on what individual users consider to represent good value for them and their needs. For some Londoners, such as gig economy workers, it may enable them to earn a living, as observed by Cyclehoops' Antony Lau: "if they don't have secure parking, they lose their bike and that's their livelihood gone". For others, it may significantly improve their quality of life, enabling them to combine daily tasks in a way that would not be possible using public transport or even a car. A secure cycle space may even encourage Londoners to start – or continue – cycling, as prompted by the pandemic. All these factors, among others, may contribute to Londoners waiting longer than they would want for a space and, in some cases, paying more than they would like to.

SUSANNE // ISLINGTON

"It's not fair if you pay more for a cycle space because you can put six cycles in the same place that a car needs… So a [car] parking space as we all know, is highly subsidised. Just nobody ever talks about that."

Image source: *Fare City*

LONDON BOROUGHS: CAR OWNERSHIP TO CURRENT CYCLE HANGAR SPACE PROVISION & UNMET DEMAND



Source: This data has been obtained between October 2021 and March 2022 from London Boroughs via Freedom of Information requests and https://www.healthystreetsscorecard.london/results/results_outcome_indicators/#ResultsCarOwnership
The corresponding dataset can be found on the Fare City website: https://farecity.org/research/

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3.5

MAP FIVE

Map 05 shows the differing levels of car ownership (number of cars per 100 households) across London in relation to cycle hangar provision and unmet demand. As may be expected, inner London boroughs have lower car ownership levels than outer London boroughs, with an average of 46.1 cars per 100 households, while outer London boroughs have an average of 93.7 cars per 100 households. Inner London also has higher levels of existing cycle hangar supply and demand, with Hackney having the highest number of hangars at 600 and the third-lowest number of cars per 100 households (35.51), and Islington having the fifth-highest number of cycle hangars and the lowest number of cars registered per 100 households (33.54).[41]

An initial reading of the map shows that there are consistently low levels of car ownership in the innermost London boroughs, in contrast with inconsistent levels of car ownership in the outermost (peripheral) London boroughs. While the highest levels of car ownership are to be found in six of these 14 peripheral boroughs, similar levels of car ownership are not present across all peripheral boroughs, despite these boroughs sharing a boundary with another peripheral borough. A key factor that may contribute to this trend is the geography of peripheral boroughs with lower car ownership levels, as their boundaries range from the edge of Greater London and connect to an inner London borough.

The proximity of these connecting peripheral boroughs to an inner London borough enables them to share infrastructure to differing extents, while some may also share similar patterns of development, as highlighted in Map 01. Assessing the public transport accessibility level (PTAL) of both these connecting peripheral boroughs and their adjacent inner London boroughs may begin to reveal why these connecting boroughs have relatively low levels of car ownership and relatively high levels of cycle hangars in comparison to the highest car owing peripheral boroughs. For instance, in North London, Barnet has a low PTAL rating (2), whereas it borders Camden, which has a PTAL rating of 5 – one of the highest of all London boroughs. Similarly, in South London, Croydon with a PTAL rating of 2, borders Lambeth, an inner London borough with a PTAL rating of 5.[42]

Though the relationship between other connecting peripheral London boroughs and their adjacent inner London boroughs may not be as pronounced, all are similar to varying extents. Interestingly, Bromley and Bexley (both PTAL 1b) also border inner London boroughs, but with low relative PTAL levels; Bromley borders Lewisham (PTAL 3) and Bexley borders Greenwich (PTAL 2). Of the 32 London boroughs, the 20 outer London boroughs scored an average PTAL rating of 1.75, whereas the 12 inner London boroughs scored an average of 4.41. Furthermore, of the six boroughs with the highest car ownership levels, Bromley and Bexley have among the lowest car ownership levels, with Bromley the lowest and Bexley the fourth-lowest of the six.[43] The other four boroughs all border only the outer London boroughs, perhaps further highlighting the importance of a high PTAL inner borough border.

Of the six peripheral boroughs with the highest car ownership levels, three of the four that border other outer London boroughs (Hillingdon, Harrow and Havering) have no cycle hangars and no residents on a waiting list, though Sutton – the fourth borough – does have over 100 cycle spaces. By contrast, every connecting peripheral borough (except Bexley, and Redbridge – no data) have some cycle hangar provision.[44] This may suggest a level of interdependency between public transport accessibility and cycling, and the multimodal nature of trips that some Londoners are taking.

This supports previous TfL reports of the "relationship between car ownership and PTAL, with considerably lower levels of car ownership at higher PTAL, reflecting the better alternatives to car use in these locations".[45] These types of trip patterns are something cycling is particularly suited to, and secure cycle parking – not only residential but at transport interchanges – can be considered important in encouraging more Londoners to make more multimodal trips.

The map also highlights anomalies that suggest that a borough's trajectory can buck this trend. Prominent are the three Mini-Holland boroughs (Waltham Forest, Kingston-Upon-Thames, and Enfield): all are peripheral boroughs, though only Enfield borders exclusively outer London boroughs. All have varying levels of car ownership and average PTAL ratings relative to other outer London boroughs, but high levels of cycle hangar provision and infrastructure, with all three being in the top ten of all London boroughs with the highest total length of protected cycle track as a percentage of borough roads.[46] This suggests how high levels of investment

paired with a clear strategic vision and the resources to initially deliver cycle infrastructure may enable other outer London boroughs to nurture latent demand for cycle hangars.

Helping Londoners, especially in outer London, to strike a balance between car use and more sustainable modes has, in recent years, been assisted by planning guidance including the Mayor's London Plan – a statutory spatial development strategy. When first introduced in 2004, new developments with private dwellings were advised to follow local guidance as opposed to providing statutory requirements with regards to the number of cycle parking spaces per dwelling. In contrast, the latest London Plan (2021) sets minimum cycle parking standards for a long stay of one cycle space for a one-person/one-bedroom dwelling, and up to two spaces for all other dwellings.[47]

The need to reduce car dependency and increase the sustainable modal share across the whole of London is fundamental to enabling the capital to realise its target of becoming a carbon-neutral city by 2030. This ambition is underpinned by the mayors' chosen London net zero 2030 pathway targets for reductions of 27% of vehicle kilometres (vkms) travelled;[48] the Mayor's Transport Strategy (MTS) modal shift targets for 80% of journeys to be made by walking, cycling or public transport by 2041 (which could be brought forward to 2030 to support net zero);[49] and the proposed expansion of the ultra low emission zone to cover the whole of London by 2024.[50]

A range of transport-specific measures will need to converge if these targets are to be met, including a new road user charging system and a long-term funding agreement for TfL, to not only ensure existing network functionality but also the ability to plan for – and realise – new sustainable infrastructure. Active travel, which broadly covers walking, wheeling, and cycling, has a key role to play in this, while cycling itself should aspire to a much bigger role. This will undoubtedly be supported by more Londoners feeling empowered to cycle, which will include having the confidence to safely store a cycle both at home and in the city.

KERI // SOUTHWARK

"I think cycling should be at a reduced cost, because not only does it benefit the environment, its good for our health. So it's a win win not only for ourselves but for everyone, NHS included. There's a long list of areas that it benefits and I think that it should be encouraged"

Image source: *Fare City*

CONCLUSION AND RECOMMENDATIONS

There are many reasons why the disparity between the level of demand, the extent of delivery, and the variation in cost for a cycle hangar space between London boroughs is so pronounced. In response to the two research questions, the report identifies a multitude of factors; however, of these, three can be considered to be most influential. These factors collectively inform the transport-orientated trajectory that individual boroughs position themselves on and can, to varying extents, be managed with a view to changing a borough's trajectory. This, in turn, may then impact how individual boroughs prioritise cycling and cycle hangar provision.

The geography of a borough, and its geography in relation to neighbouring boroughs, is important. This encompasses the types of building stock, public infrastructure, and informal governance structures that boroughs may possess or share with one another. It also informs the extent to which public space is contested, both operationally and financially. These are key concerns in a city such as London, where space is finite and commands an economic premium. Largely tied to geography and contested space is how Londoners currently navigate the city. While a growing number of sustainable transport options are readily available – from shared e-scooter and e-cargo bike schemes to the imminent opening of Crossrail – too many Londoners are still overly reliant on private cars.

Car dependency not only contributes to environmental and social inequity, but largely marginalises other, more sustainable, modes from assuming a greater role. This includes cycling and cycle hangars themselves, which are losing out to cars in terms of provision, access, and affordability in most London boroughs. These are key drivers for Londoners, given TfL's fare rises combined with a growing cost-of-living crisis. Car dependency and its fallout are symbiotically tied to the motives of a borough's decision-makers. Some interviewees cited "political will" as being a prerequisite for pushing through cycling and cycle infrastructure. However, this perhaps fails to acknowledge that political will cuts both ways, and for boroughs who actively incentivise car use, either persuading them or pushing them onto a different trajectory will not be easy.

There are, however, reasons to be optimistic. The growing number of applicants on cycle hanger waiting lists alone shows that more Londoners are asking to travel more sustainably. Allied with this is the growing array, if not yet affordability, of different types of cycles that may encourage new users to switch from polluting modes. Building a critical mass of those who choose to cycle will be important in pushing boroughs to act, though this can only succeed if boroughs themselves honour their climate emergency commitments and work to seize the initiative.

01 Recommendation

Establish a dedicated cycle parking officer role

Officer capacity for the implementation of cycle hangars varies greatly among London boroughs. Some borough officers may manage the delivery of cycle hangars as part of a broad transport-based brief, while another borough's officers will be tasked exclusively with the delivery of cycle hangars. From identifying demand for hangars through to installing them on site, the delivery of hangars can be a time-intensive process that boroughs prioritise to differing extents, based on their individual trajectories.

Fare City recommends that boroughs create an officer role dedicated to the delivery of all types of cycle parking spaces. This represents an intermediary step for many boroughs and would be the most responsive to the specific cycle parking needs of each. Doing so may not only increase the delivery of cycle hangars but also improve their functionality as part of an integrated borough-wide active travel network.

02

Recommendation

Make cycle hangar rental schemes more equitable for residents

Managing the demand for cycle hangars could be improved among London boroughs. Boroughs with low levels of demand should aim to generate and then nurture sustained levels of higher demand, whereas boroughs with high levels of demand should aim to manage demand more effectively. While installing new hangars to meet demand is preferable, existing hangar provisions could be made to work more efficiently by freeing up underutilised spaces and encouraging active occupancy.

Fare City recommends that cycle hangar parking needs to be more equitable to the needs of residents. Currently, annual rental schemes are inflexible and do not incentivise active occupancy. Providing a range of rental options – in line with car parking permits – could help boroughs and suppliers more easily track usage to match those on waiting lists to spaces. Furthermore, boroughs and suppliers should commit to serving the needs of those with non-standard cycles, not only to meet existing demand but also to generate and nurture new demand.

03

Recommendation

Develop and communicate a strategic vision for cycling

The long-established cycle between car dependency and electoral votes at a local government level must be broken. The extent to which this cycle manifests itself is evident by the inequity of the cost of a cycle hangar space versus that of a car parking space in the majority of London boroughs. It is the responsibility of car-dependent boroughs to alter their current trajectories by facilitating the shift to more sustainable modes of transport. Boroughs should aim to incentivise active travel and disincentivise car use by working closely with other boroughs. Leveraging shared infrastructure, while adopting – and adapting – best practices specific to the borough's needs should be prioritised.

Fare City recommends that boroughs should aim to make cycling specifically, and sustainable travel more broadly, a vote-winning issue. Developing a strategic vision that aspires to communicate the equitable, economic, and environmental benefits of cycling and aligning these with residents' current and future transport needs, is fundamental to encouraging cycling uptake - as is redressing the current imbalance between cycle and car parking costs. Setting and attaining tangible targets will help boroughs to communicate their progress and may strengthen their mandate for further measures.

FURTHER DISCUSSION

This report comprises an initial assessment of the cycle hangar provision in London. There are undoubtedly many other lines of enquiry that future research on the subject could take; this is a testament to the increasingly important role that cycle parking plays in London, coupled with the complex nature of the interdependent factors that influence cycle hangar demand and delivery.

During the report research, the Fare City team identified several areas that it considered to be important for further research. This could either be conducted by Fare City or by other organisations with an interest in this field. Doing so may not only advance the understanding of cycle hangar provision and demand in London but also help to assess the role that cycle hangars can fulfil in relation to the capital's future development needs. The suggested areas for further research are as follows:

- The quantitative data for cycle hangar delivery, demand, and cost used in this report is time-bound to a six-month window. Further research could benefit from widening the data window to include data from the time when cycle hangars were first used in London. This may help to identify longer-running trends and lead to targeted recommendations. This data could be obtained by similar FOI requests, or by working directly with the different suppliers themselves.

- In-depth research into the long-term impact of policies and delivery of cycle hangars since 2011, on cycling rates and modal shift at a borough and London-wide level. This could establish a greater understanding of the benefits they provide, how their delivery can be optimised, and the business case for future priority in policy, funding, and delivery.

- Research that explores alternative funding models for both the delivery and management costs of cycle hangars. This could include researching the impact and wider applicability of borough self-financing models; the role of development contributions in funding cycle parking; how car parking revenues can fund cycle parking and sustainable transport; and whether flexible pricing plans could enable more equitable access to cycle hangars for all Londoners.

- As the report suggests, the activity levels of cycle hangar occupancy can vary. Opportunities to research the levels of active/inactive occupancy of cycle hangars could reveal trends in the type of usage while providing a greater understanding of what type of cycle parking Londoners require, for instance, a place to 'store' a cycle for occasional use, or a place to park a cycle securely, thereby enabling daily trips and greater modal shift.

- As the report suggests, further research into the role that cycle hangars play in providing secure parking for non-standard cycles is important. This is to ensure that cycling and secure cycle parking are accessible for all Londoners, and supports the use of adapted cycles, including cargo bikes and larger e-bikes.

- Research to determine the future suitability of cycle hangars as a form of secure residential parking. This could assess whether hangars can meet ever-increasing levels of demand and whether other options, or blended models of provision, could be considered more appropriate.

NOTES

1. TfL. 2021. Travel in London Report 14. p70

2. IPCC. 2022. The evidence is clear: the time for action is now we can halve emissions by 2030.

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