



# forest

women of the forest 2026







# Introduction (1 of 2)

London has made significant progress in getting more people cycling over the past decade, yet one challenge remains stubbornly persistent: women continue to cycle less than men. While cycling levels have grown across the capital, women account for only around one-third of cycling journeys, despite making up half of London's population. This disparity matters because it reflects unequal access to the health, economic and environmental benefits that cycling can provide.

**“Research consistently shows that women are more likely to cite concerns around road safety, personal security and confidence as barriers to cycling.”**

These concerns influence not only whether women choose to cycle, but also when they ride, where they ride and the routes they take. If London is to become a city where cycling is a realistic option for everyone, these barriers must be better understood and addressed.

As London's largest homegrown shared e-bike operator, Forest has a responsibility to play a role in that change. Every day, hundreds of thousands of Londoners choose Forest to travel to work, visit friends, run errands and explore their neighbourhoods. This gives us a unique opportunity to understand how women experience cycling today, what encourages them to ride and where improvements can still be made.

This report forms part of Forest's wider commitment to creating a safer, more inclusive transport system and supporting the Mayor of London's Vision Zero ambition—



# Introduction (2 of 2)

to eliminate deaths and serious injuries from London's roads. While safer road infrastructure remains fundamental, creating a transport network that works for everyone also requires a better understanding of how different groups experience the city.

**“Our findings show that relatively small design choices can have a meaningful impact”**

For example, over half of women surveyed (56.7%) said they prefer to park as close as possible to the entrance of their destination when it is dark, whereas 67% of men said parking location makes little difference to them. Insights like these can help inform where designated parking bays are located, encouraging boroughs to prioritise well-lit, highly visible locations—

close to key destinations. Designing infrastructure around the needs of those who feel least confident often results in better outcomes for everyone.

Ultimately, this report is intended not simply as a snapshot of Forest's female riders, but as a contribution to the wider conversation about how London can close the gender gap in cycling. By understanding the experiences, behaviours and preferences of women, we hope to support evidence-based decisions that make cycling feel safer, more accessible and more appealing for all Londoners.

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**Alex Berwin**

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# Summary

## Key findings

- Women are significantly more likely than men to report cycling more frequently after using Forest.
- Women rely on Forest for everyday journeys.
- Women see Forest as an enabler, giving many women the confidence to cycle more often.
- There is an inclusion opportunity with women from minority ethnic backgrounds significantly under-represented among Forest riders.
- Women have stronger parking infrastructure preferences to men, preferring well-lit locations close to their destinations.
- Women feel less safe on the roads due to external issues that they have no control over: traffic, road conditions and infrastructure, and harassment.

## Opportunities

- Support the school run: explore discounted school commute bundles or partnerships with schools, enabling parents to pick up a bike after drop-off.
- Target under-represented communities: work with community organisations, schools and local groups to encourage more women from minority ethnic backgrounds to try cycling.
- Turn first-time riders into lifelong cyclists: build on Forest's role as a confidence-builder through beginner-friendly routes, community rides and campaigns that encourage occasional riders to cycle more often.
- Incorporate women's safety preferences into parking design: share evidence with boroughs that parking location matters more to women than men, helping inform the placement of designated bays in well-lit, highly visible locations close to key destinations.



# 1

# understanding our female riders





**Forest is facilitating more young professional women to cycle in London compared to the national average.**







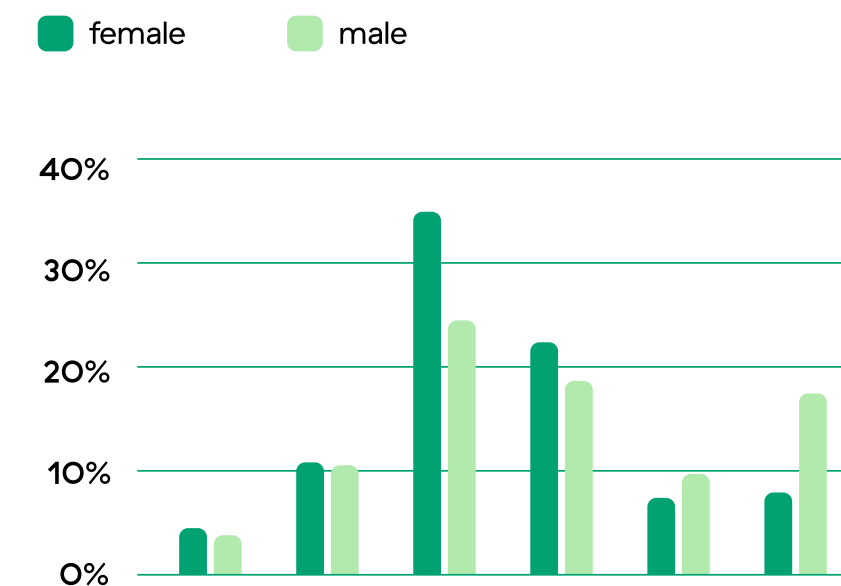
# Employment & Income

## Our female riders earn less than men.

Employment status is broadly similar across genders. However, women are more likely to fall within the £30,000–£49,999 income bracket, while men are more heavily represented among those earning £75,000 or more.

This reflects wider labour market trends and suggests affordability may be a particularly important consideration for female riders.

### annual income (% within gender)

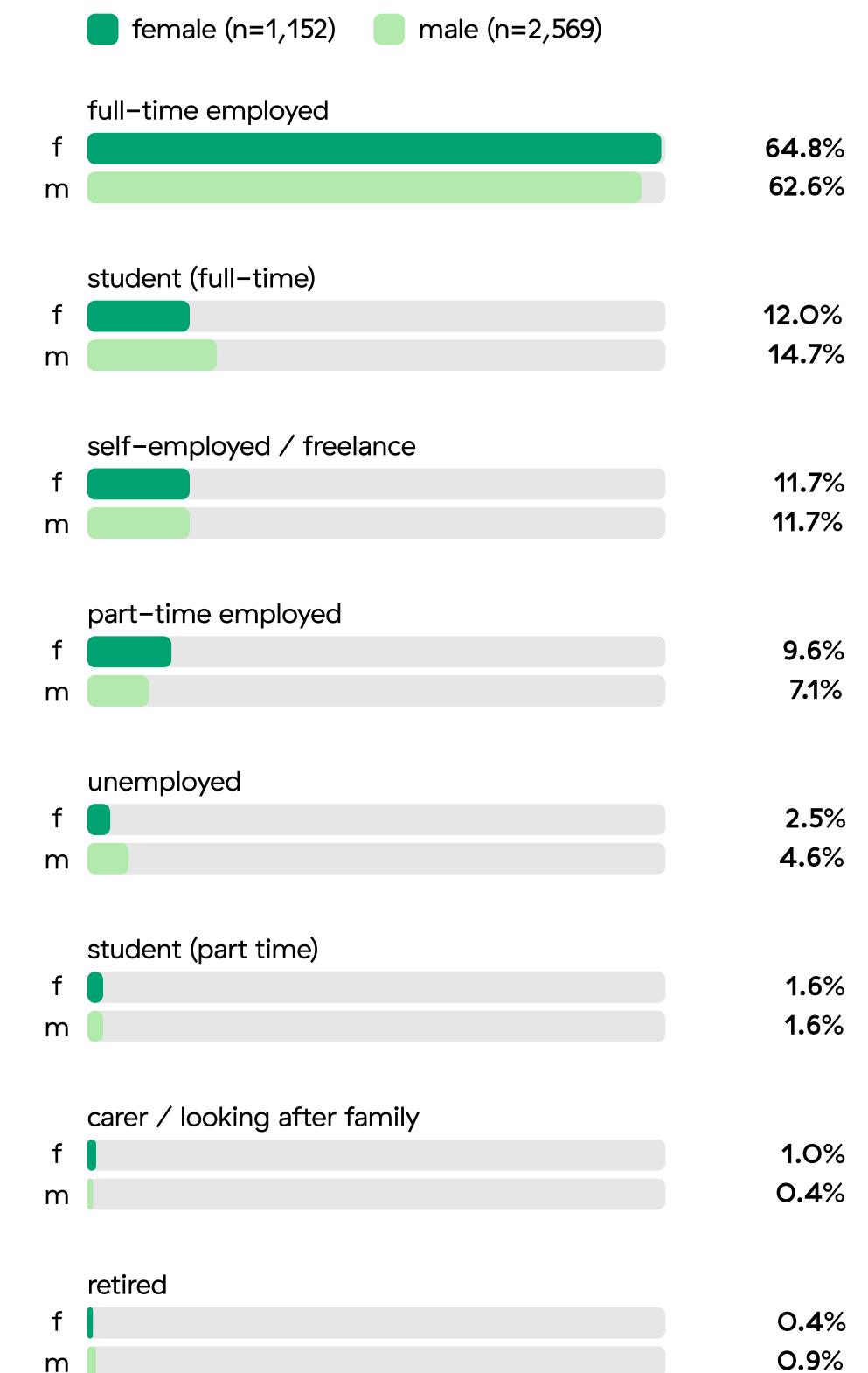


excl. 'prefer not to say' (f: 11.6%, m: 15.1%) and 'not earning' (f: 0.7%, m: 0.8%)

### full breakdown (% within gender)

| income band       | female | male  | gap (f - m) |
|-------------------|--------|-------|-------------|
| less than £1.5k   | 4.4%   | 3.9%  | +0.5pp      |
| £15k - £29k       | 10.7%  | 10.5% | +0.2pp      |
| £30k - £49k       | 34.7%  | 24.3% | +10.4pp     |
| £50k - £74k       | 22.2%  | 18.5% | +3.7pp      |
| £75k - £99k       | 7.3%   | 9.6%  | -2.3pp      |
| £100k             | 8.2%   | 17.3% | -9.1pp      |
| prefer not to say | 11.6%  | 11.6% | —           |
| not earning       | 0.7%   | 0.7%  | —           |

### employment status (% within gender)



respondents could select multiple statuses. Bars scaled to 65% maximum.

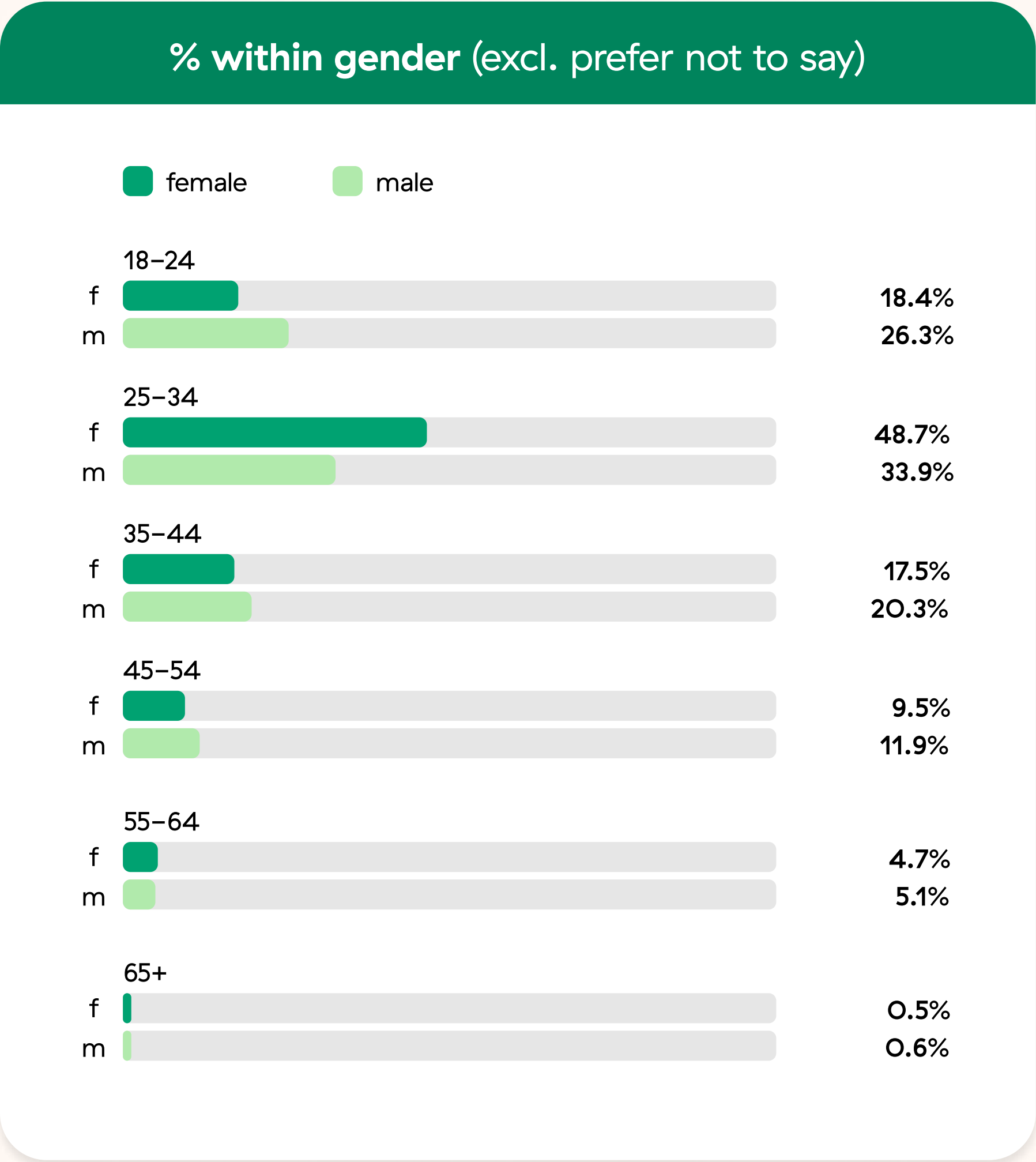


# Age (1 of 2)

Women aged 25–34 are the only Forest rider age cohort in which female riders outnumber male riders, making young professional women one of the service’s core demographics.

This contrasts with wider cycling trends in England, where cycling among women is most prevalent among those aged 40–49.\*

\*NTS 2024: Active travel: [www.gov.uk/government/statistics/national-travel-survey-2024/nts-2024-active-travel](https://www.gov.uk/government/statistics/national-travel-survey-2024/nts-2024-active-travel)



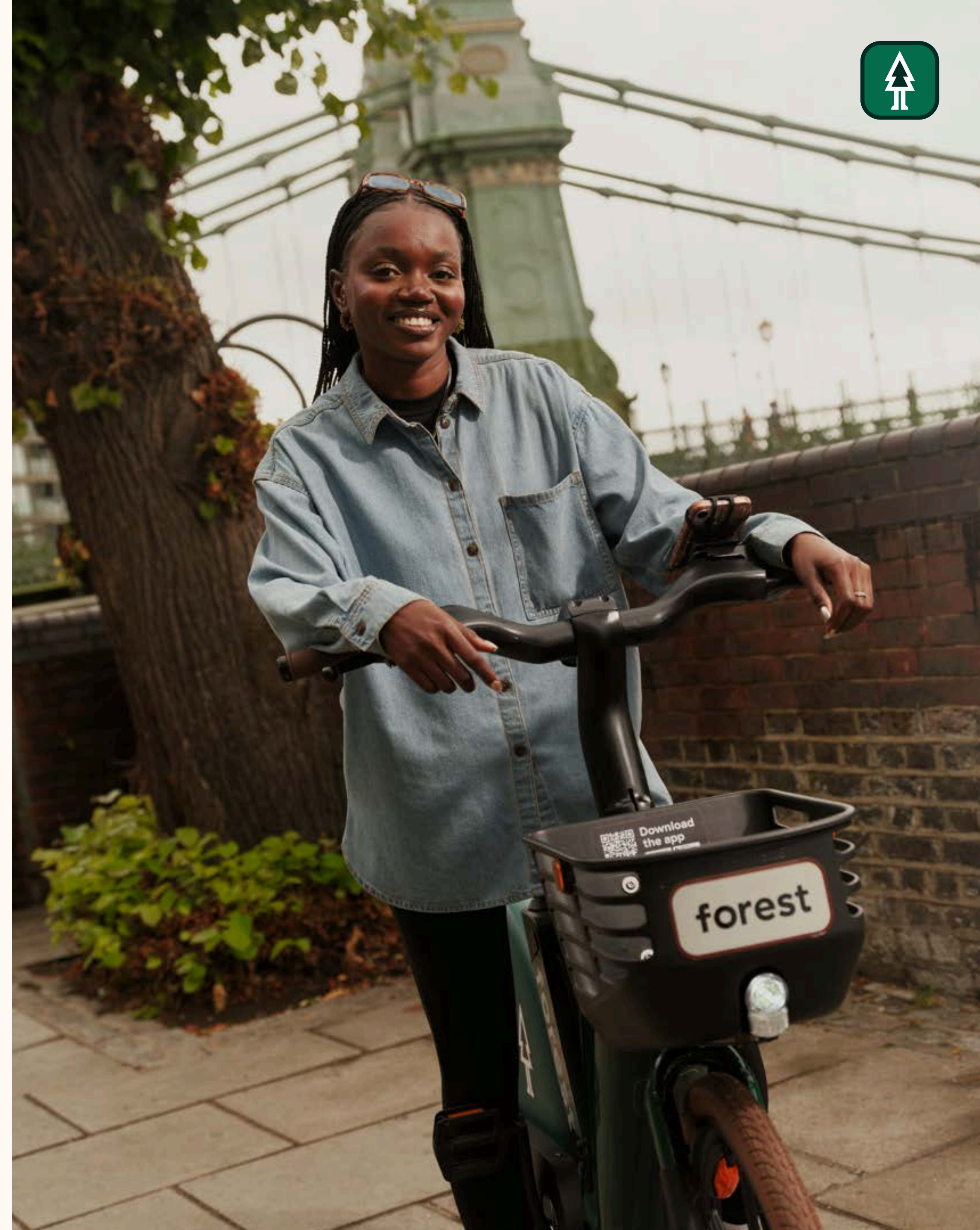




## Age (2 of 2)

This suggests Forest is attracting a younger cohort of women to cycling, with 25–34 year olds engaging with our dockless service at a higher rate than might be expected from national cycling patterns.

Compared with men, there are fewer women aged 18–24 and 45+, suggesting there could be opportunities to better understand and address the barriers preventing younger and older women from cycling.







# Disabilities and health conditions

## Forest's e-bikes support women with disabilities and health conditions to access cycling.

A notable finding is that 31.4% of female riders reported having a disability or long term health condition, compared with 18.1% of men.

Several respondents mentioned autoimmune conditions, while others highlighted using Forest during pregnancy as an easier way to travel.

These findings demonstrate that e-bikes can provide an important mobility option for women with a wide range of physical and health needs.

| condition                  | F %   | M %   | NB %  | ALL % | GAP F-M |
|----------------------------|-------|-------|-------|-------|---------|
| no condition               | 71.6% | 81.0% | 50.0% | 77.2% | -9.4pp  |
| neurodivergent             | 12.4% | 7.0%  | 39.5% | 9.0%  | +5.4pp  |
| mental health condition    | 7.8%  | 3.5%  | 13.2% | 4.9%  | +4.3pp  |
| long-term health condition | 6.2%  | 3.4%  | 2.6%  | 4.3%  | +2.8pp  |
| learning disability        | 2.0%  | 1.2%  | 0.0%  | 1.4%  | +0.8pp  |
| physical impairment        | 1.9%  | 1.2%  | 2.6%  | 1.4%  | +0.7pp  |
| sensory impairment         | 1.5%  | 0.8%  | 2.6%  | 1.0%  | +0.7pp  |
| prefer not to say          | 0.7%  | 0.7%  | —     | 5.8%  | -0.9pp  |
| other                      | 0.7%  | 0.7%  | —     | 0.8%  | +0.8pp  |

*NB = Non-binary (n=38 – small base, treat as indicative only).  
All figures are % of gender group total.*





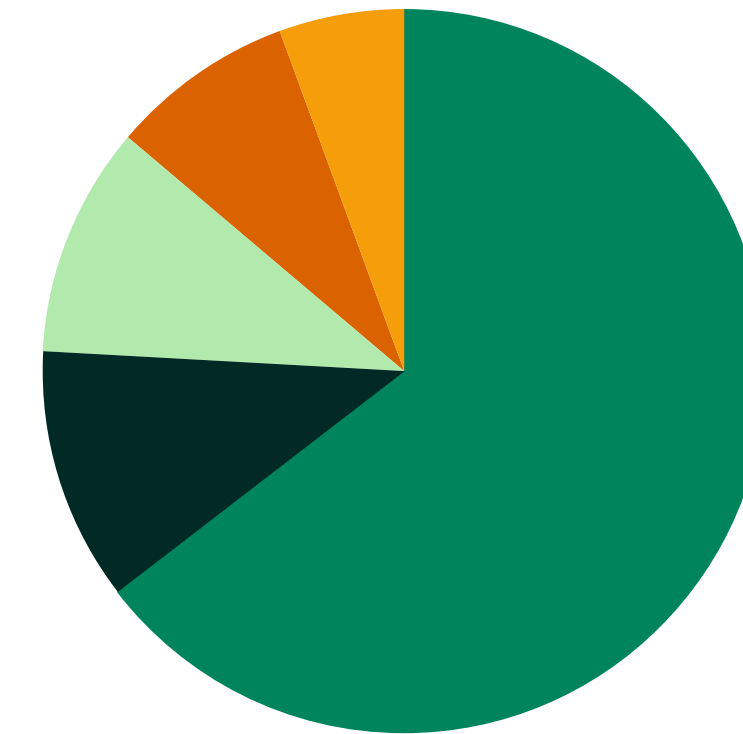
# Ethnic Diversity (1 of 2)

**There is more work to be done to diversify the ridership.**

Overall, 64.8% of Forest riders identify as White, rising to 74.3% among women.

This means more than a quarter of female Forest riders are from ethnic minority backgrounds, which is notable in the context of national cycling trends, where Black and South Asian adults are among the least likely groups to cycle regularly.

## overall ethnicity (all riders)



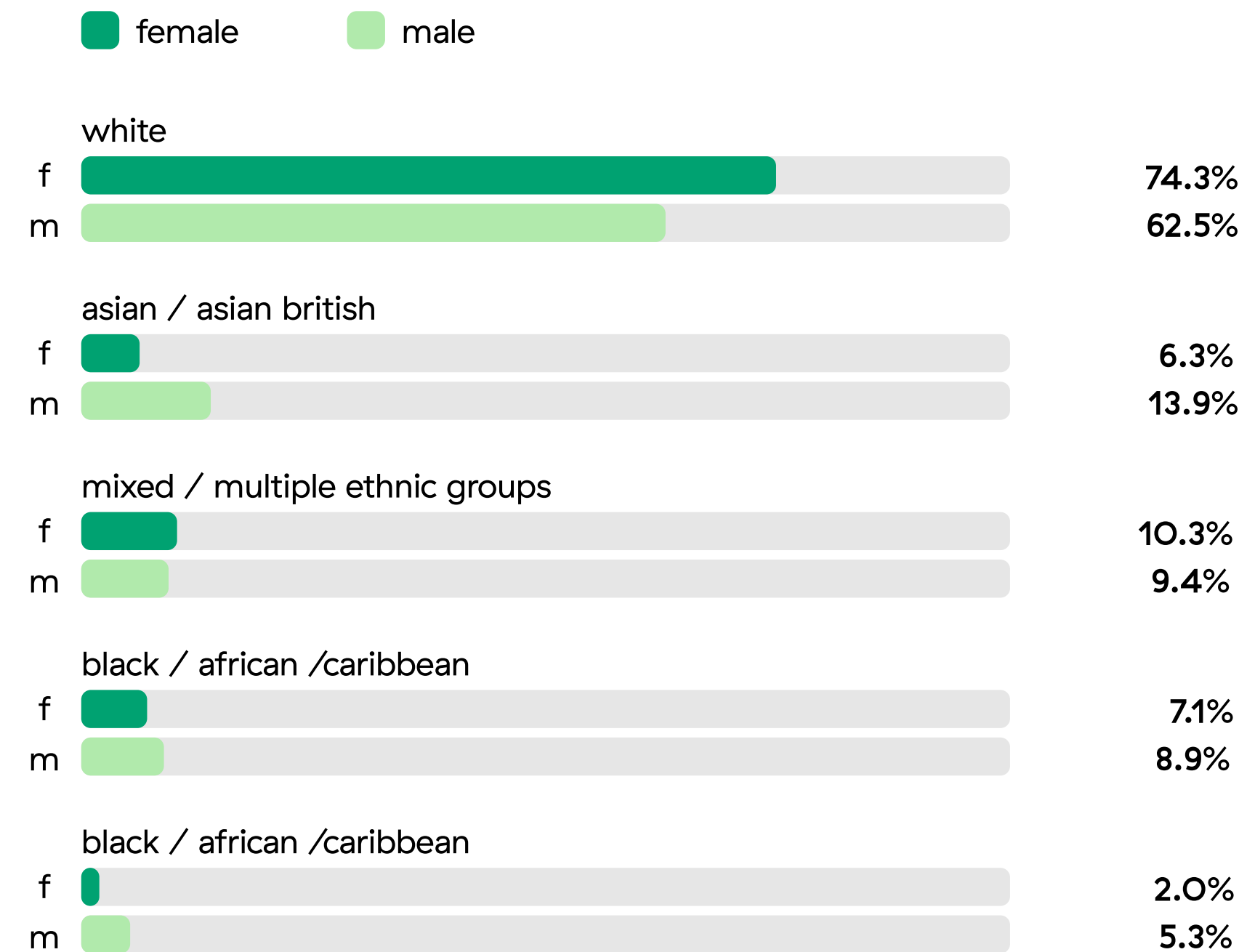
|                             |       |
|-----------------------------|-------|
| white                       | 64.8% |
| asian / asian british       | 11.4% |
| mixed / multiple            | 9.9%  |
| black / african / caribbean | 8.2%  |
| prefer not to say           | 5.6%  |



# Ethnic Diversity (2 of 2)

However, female Forest riders are less likely than men to identify as Asian or Black, suggesting there remains an opportunity to engage more closely with women from ethnic minority communities, particularly Asian women, to better understand the barriers they face and identify ways to make cycling more accessible and inclusive.

## ethnicity split by gender (% within gender)





# 2

how are  
women using  
forest?

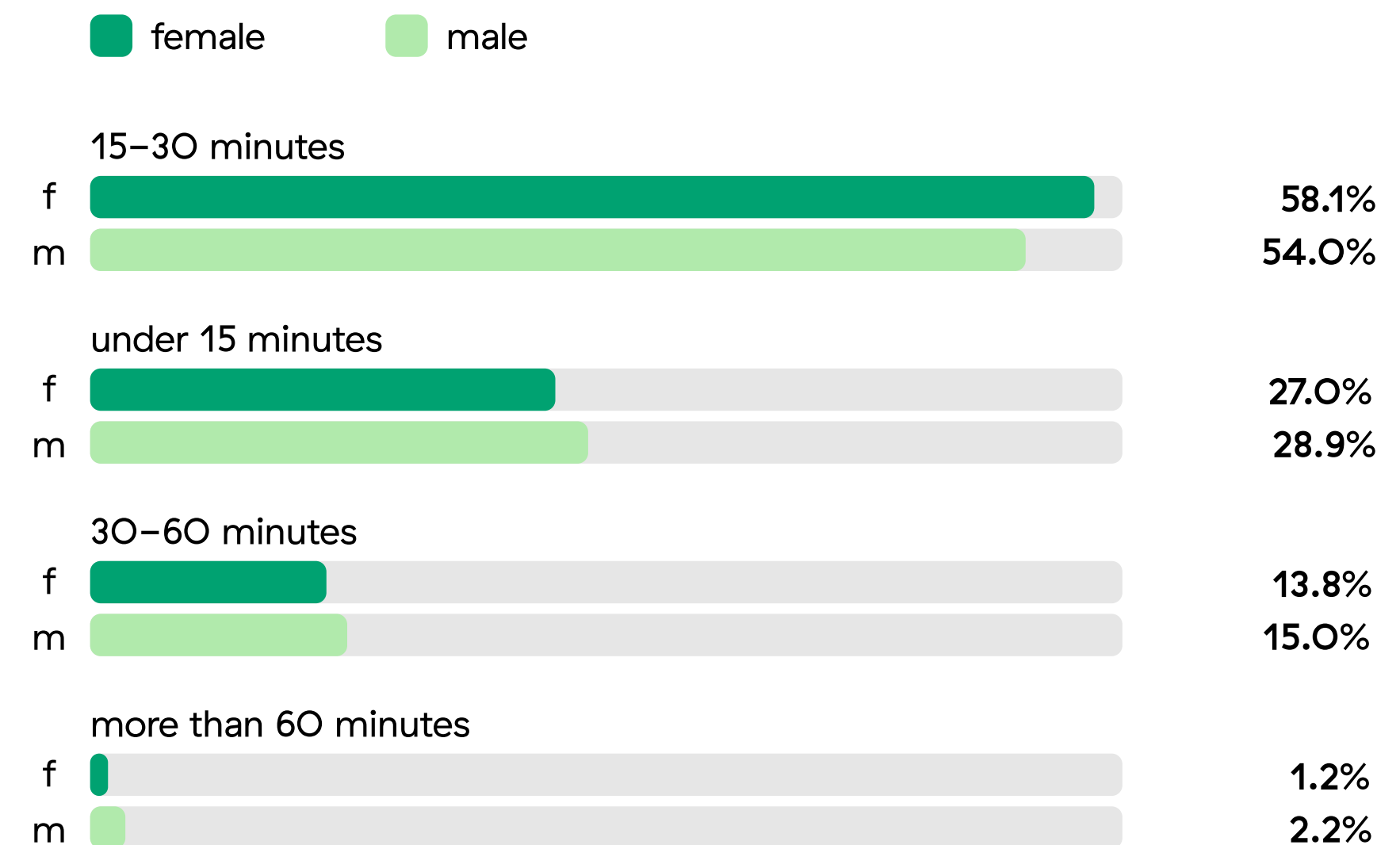


# Ride Length (1 of 2)

Across the UK, women undertake 60% more unpaid work than men\*, including childcare and other caring duties, with school drop-offs and pick-ups disproportionately falling to mothers.

This is reflected in Forest's usage data. Women are more likely than men to take intermediate length journeys of (15–30 mins), the type of trip for which shared e-bikes are particularly well suited.

## typical ride duration (% within gender)



Bars scaled to 60% maximum

\*ONS 2016: [www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/articleswomenshouldtheresponsibilityofunpaidwork/2016-11-10?utm\\_](http://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/articleswomenshouldtheresponsibilityofunpaidwork/2016-11-10?utm_)



# Ride Length (2 of 2)

These journeys are long enough that walking is impractical but short enough that cycling offers a faster, more convenient alternative than driving or public transport. They also help create a more balanced pattern of bike usage throughout the day, rather than generating sharp peaks in demand associated with commuter-only travel.







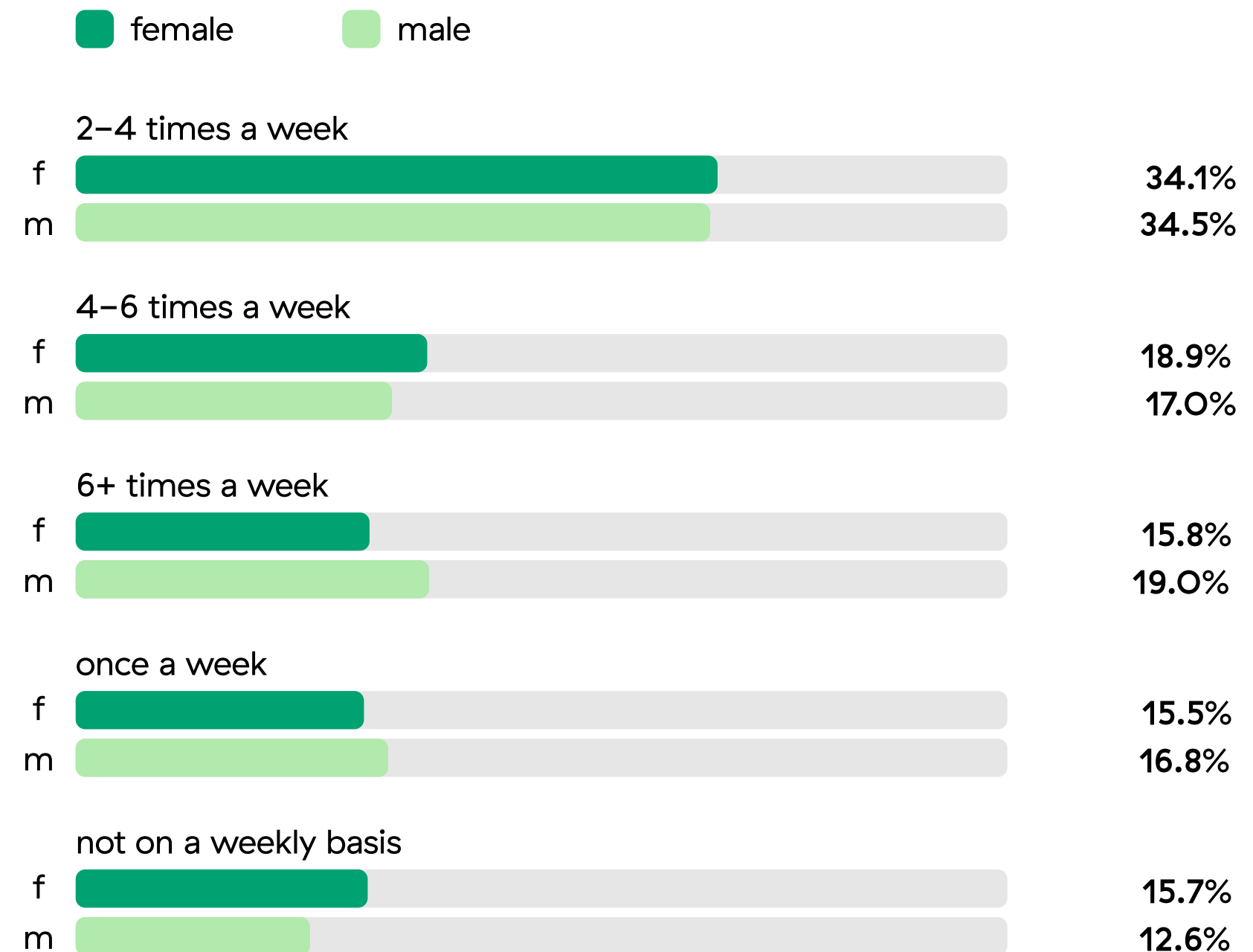
# Ride Frequency

(1 of 3)

Despite these differences in journey length, overall riding frequency is remarkably similar between women and men.

Female riders mirror male riding habits across most frequency categories, with a slightly higher proportion of women taking four to six rides per week. This suggests that once women adopt Forest, they become regular users, integrating cycling into weekly routines rather than using our service occasionally.

## ride frequency (% within gender)





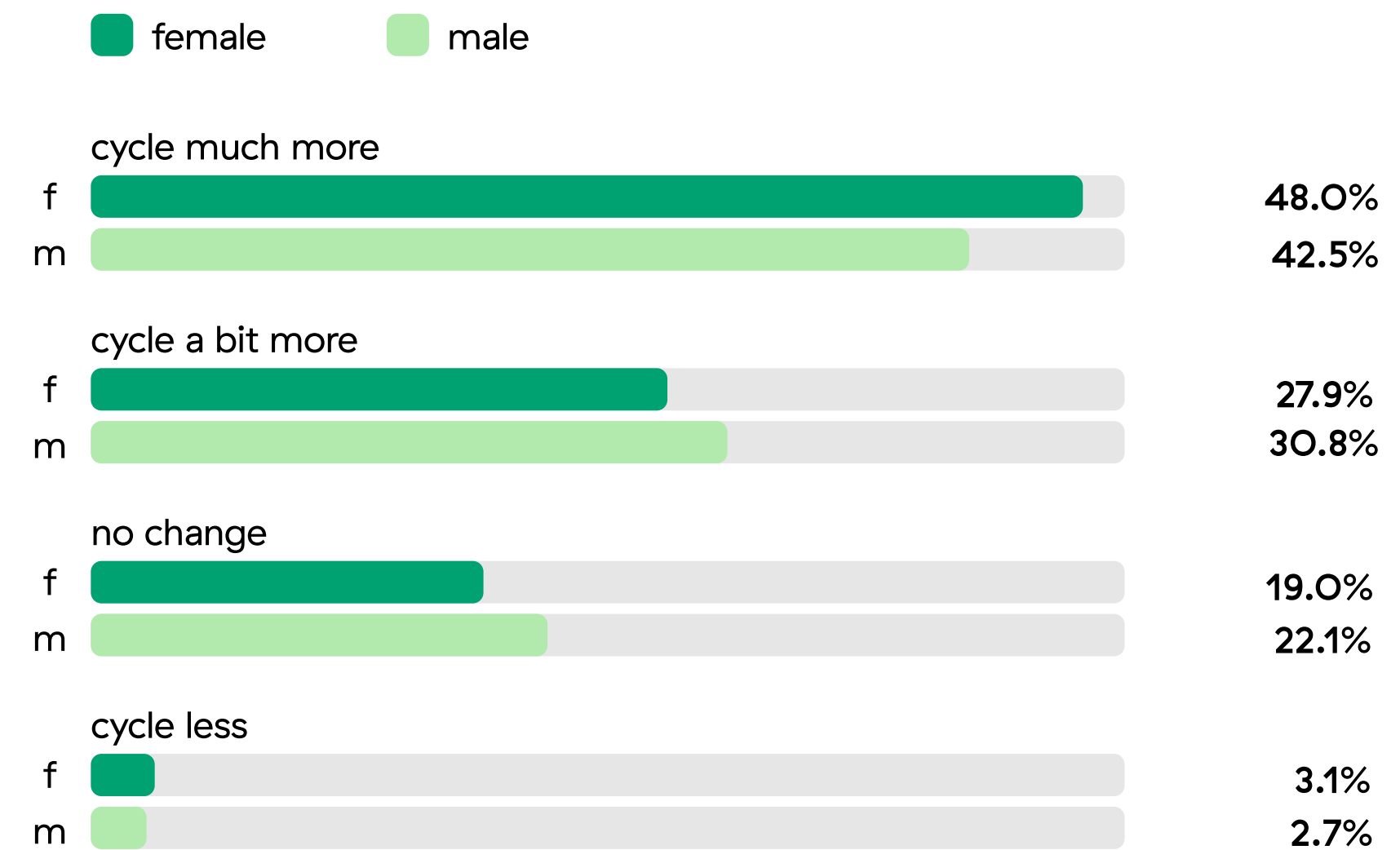


# Ride Frequency (2 of 3)

## Forest has led to more women cycling in London.

Before using Forest, women were less likely than men to cycle regularly. Just 28.3% of women reported cycling at least once a week, compared with 33.1% of men. Women were also more likely to have never cycled before using Forest, with 14.4% saying they had never ridden a bike, compared with 11.7% of men.

### cycling frequency since joining forest



Bars scaled to 50% maximum



# Ride Frequency (3 of 3)

Despite starting from a lower baseline, women experience an even greater shift in their cycling habits after joining Forest. 75.9% of women say they now cycle more than they did before using Forest, compared with 73.3% of men.

These findings suggest that Forest is not simply serving existing cyclists, but helping bring new riders into cycling and encouraging women to make cycling a more regular part of their everyday lives. By lowering barriers to entry and making cycling an easy, convenient transport option, Forest is helping open the door to more women choosing to travel by bike.





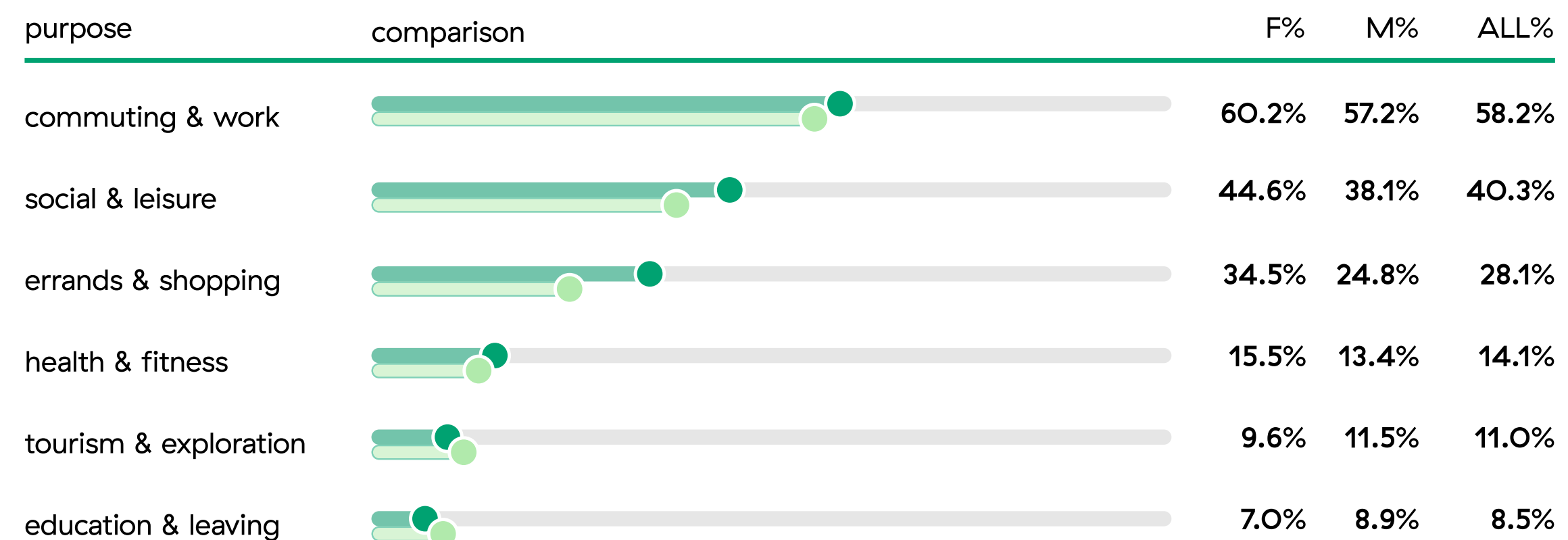


# Journey Purpose

Women use e-bikes for everyday life such as commuting, shopping, errands and social trips. In contrast, men have slightly more recreational or exploratory usage. Shared bikes are becoming an essential transport mode, particularly for women.

## journey purpose – female vs male vs all (% selecting, multi-select)

female male





# Bike Ownership

**Women rely on shared e-bikes more as they are less likely to own their own bike.**

Female Forest riders are 2% less likely to own a bike vs. a male forest rider (39.1% women own a bike vs. 41.1% men). Women are also less likely to have ever owned a bike.

This supports the idea that women have deeply ingrained shared e-bikes into their transport preferences and that shared e-bikes allow them to enter the cycling world, despite not owning their own bike.

**38.6%**

women have never  
owned a bike.

**31.8%**

men have never  
owned a bike.



# 3

how  
women see  
forest?



# How Women See Forest

- Opinions
- Brand Attributes
- Why Forest

Women are more connected to Forest’s brand.

The largest gaps between men’s and women’s opinions of Forest aren't around price or functionality, they're around ethics, identity, enjoyment and brand affinity.

| gender gap ranked – mean score difference (f–m) |       |       |         |
|-------------------------------------------------|-------|-------|---------|
| statement                                       | F %   | M %   | GAP F–M |
| largest gaps – emotional / values               |       |       |         |
| ethical choice to make                          | 3.95% | 3.73% | +0.22   |
| riding makes me feel good                       | 4.19% | 3.98% | +0.21   |
| happy to be associated with forest              | 4.17% | 3.98% | +0.19   |
| preferred choice over others                    | 4.33% | 4.14% | +0.19   |
| mid – ranged gaps – mixed                       |       |       |         |
| aesthetically pleasing                          | 4.05% | 3.90% | +0.15   |
| makes it easy to get around                     | 4.35% | 4.21% | +0.14   |
| good quality bikes                              | 3.79% | 3.65% | +0.14   |
| smallest gaps – fucntional                      |       |       |         |
| london better since forest                      | 4.24% | 4.15% | +0.09   |
| good value for money                            | 3.73% | 3.64% | +0.09   |
| safe and easy to use                            | 4.03% | 3.95% | +0.08   |





# How Women See Forest

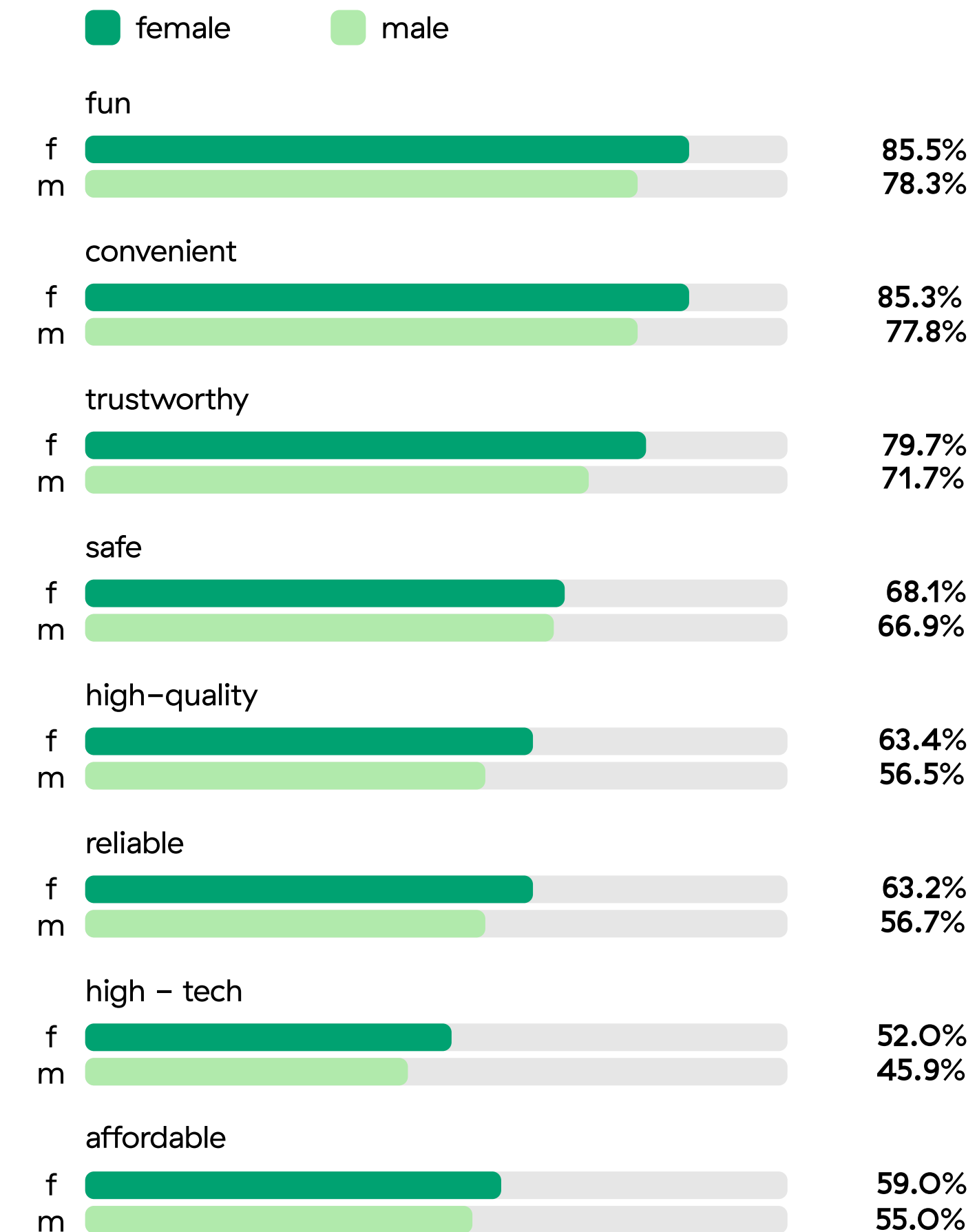
Opinions

**Brand Attributes**

Why Forest

Across almost every brand measure, women rate Forest more positively, particularly on trust, convenience, enjoyment and ethical credentials. The strongest gender differences are emotional rather than functional, suggesting Forest has built a brand that resonates especially well with female riders.

## brand attribute agree % (female vs male)



bars scaled to 86% max (female fun). All figures are % who agreed or strongly agreed



# How Women See Forest

Opinions

Brand Attributes

Why Forest (1 of 2)

When asked to rate Forest across a range of emotional and functional measures, women consistently scored the brand more positively than men. The biggest differences appear in the emotional/value led questions. Women scored higher on statements such as "a brand I'm happy to be associated with," "makes me feel good," and "an ethical choice to make." By comparison, the gap between women and men was much smaller on more functional measures, such as "good value for money."

This suggests that women's relationship with Forest goes beyond practicality. While functionality remains important, emotional connection and shared values appear to play a much bigger role in how women perceive the brand. The same pattern is reflected in Forest's brand attributes. Women rated every attribute more positively than men, with fun, convenient, and trustworthy emerging strongest.

## why choose forest?

1

Faster than other transport options

2

Convenience

3

Cost





# How Women See Forest

Opinions

Brand Attributes

Why Forest (2 of 2)

## What makes women choose Forest?

For women, the biggest reason for choosing Forest is the speed of the journey, with 42% citing this compared with 33% of men. Convenience followed closely behind (36.4%), while more than a quarter (27.5%) said they choose Forest because it's an enjoyable way to get around.

## why choose forest?

1

Faster than other transport options

2

Convenience

3

Cost

# 4

## barriers to cycling





# Safety (1 of 2)

## Perceptions of safety when cycling look different for women.

While the majority of both women and men say they feel safe when cycling, women are notably less likely to say they feel very safe. Just 28.1% of women reported feeling very safe while riding, compared with 37.5% of men. The proportion of riders who say they feel unsafe is broadly similar across both groups, but women are more likely to fall into the “mostly safe” category rather than feeling fully confident on the road.

### brand attribute agree % (female vs male)

very safe mostly safe neither mostly unsafe very unsafe

female

28.1%

58.7%

9.4%

male

37.5%

48.5%

10.1%

all riders

34.1%

51.9%

10.1%



# Safety (2 of 2)

## How time of day affects safety:

The difference becomes even clearer after dark. Safety is front of mind for many women, and this is reflected in where they choose to end their journeys. As more local authorities introduce mandatory parking bays for shared e-bikes, riders have less flexibility over where they can finish a trip. We asked users whether darkness affects where they prefer to park. Over half of women (56.7%) said they prefer to park as close as possible to the entrance of their destination when it's dark. In contrast, 67% of men said where they park makes no difference to them.

### time of day comfort – % within gender

no effect on comfort prefer closer when dark not sure

female



male



all riders







# Safety Concerns

"Car turned without indicating at junction and cut me off"

"Cars are extremely aggressive, I've been cut off multiple times. Deliveroo drivers are also extremely dangerous. I have been beeped and shouted out a ..."

"As I am a women I am always targeted on the road whether I ride a bike or a scooter. Other riders or drivers feel they can correct me or tell me off...."

"Cars/vans are very dangerous in London and many don't respect the rules (e.g. minimum distance when taking a bike over) or drive dangerously around ..."

"Sometimes drivers swerve into the bike lane without indicating to park / pick someone up / aren't paying attention to the lines. Also had drivers try ..."

"Car drivers being to close / not providing enough space in the bike lane. They then get angry and beep at you like you are the issue"

"Cars thinking they have priority since they're bigger. Intimidating and don't care if you crash"

"Cyclists going through red lights when they shouldn't and nearly hitting me"

"Drivers seem to just be very angry at cyclists and just don't realize how close they're driving next to someone on a bike."



# Cycling Confidence

(1 of 2)

Confidence is another key barrier to cycling for women. While half of men (50.4%) say they feel very confident cycling in London's traffic, that figure falls to just 30.3% for women. This confidence gap is closely linked to women's experiences on the road. Compared with men, women were more likely to report experiencing incidents that negatively affected how safe they felt while cycling. One in three women (33.6%) said they had felt unsafe because of traffic, while 29.4% had experienced aggression from other road users. A further 16.4% reported aggression from other cyclists, and 5.2% said they had experienced harassment while riding.

## confidence level (stake 100% bar)

very confident   somewhat confident   don't cycle in traffic   not very confident   not at all confident

female



male



all riders



**30.3%** female  
very confident

**50.4%** male  
very confident

**20.1pp** gender gap  
in confident

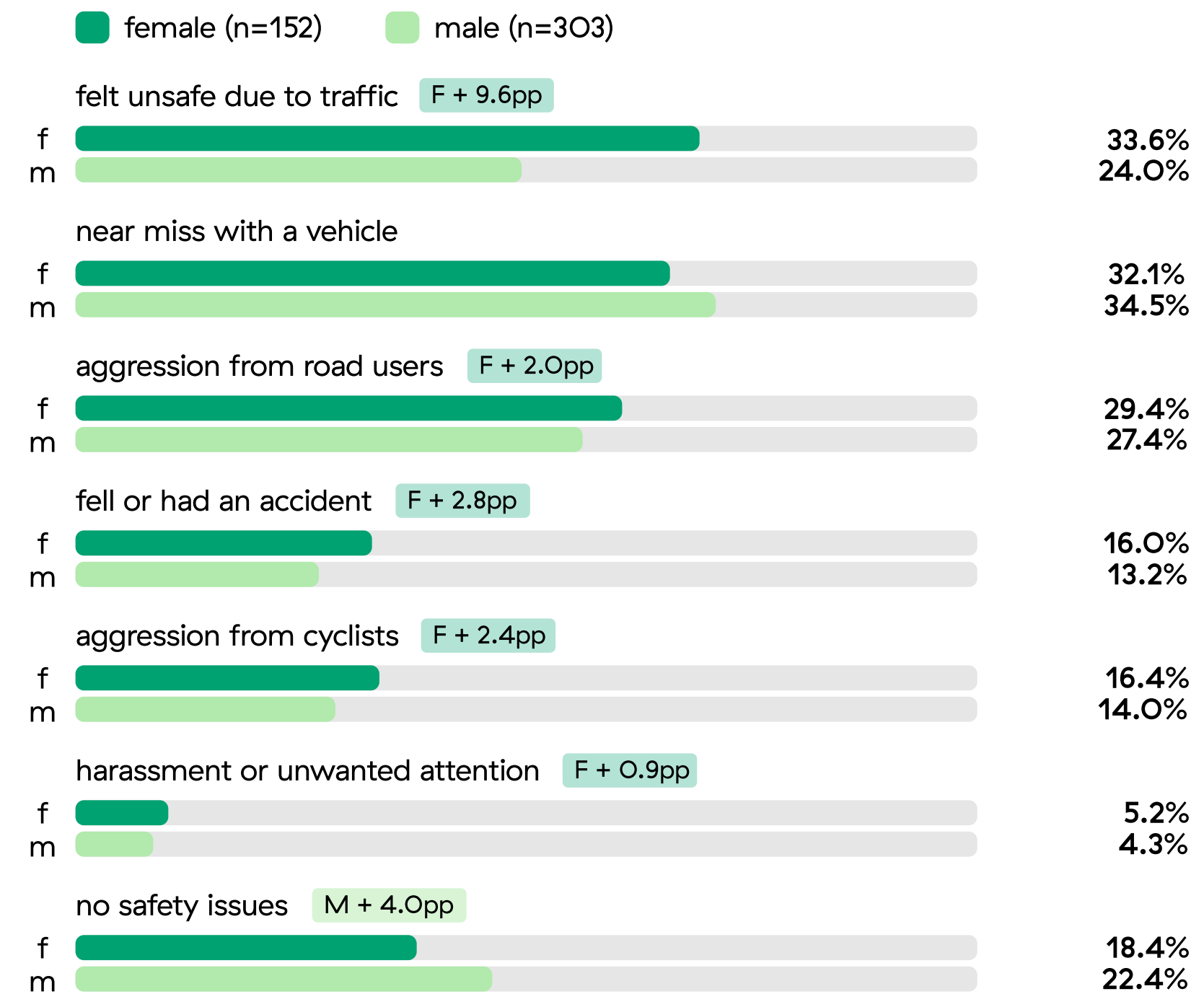


# Cycling Confidence

(2 of 2)

This shows that women's lower confidence is not simply a question of experience or willingness to cycle. Many women are already cycling, but are doing so in conditions that make them feel less protected than men. The confidence gap will not be closed by encouraging women to simply be more brave whilst cycling, but by reducing the frequency of scenarios that make cycling feel unsafe in the first place: fast traffic, close passes, aggressive road behaviour and gaps in protected and well-lit cycle routes.

## Safety concerns experienced when riding with Forest







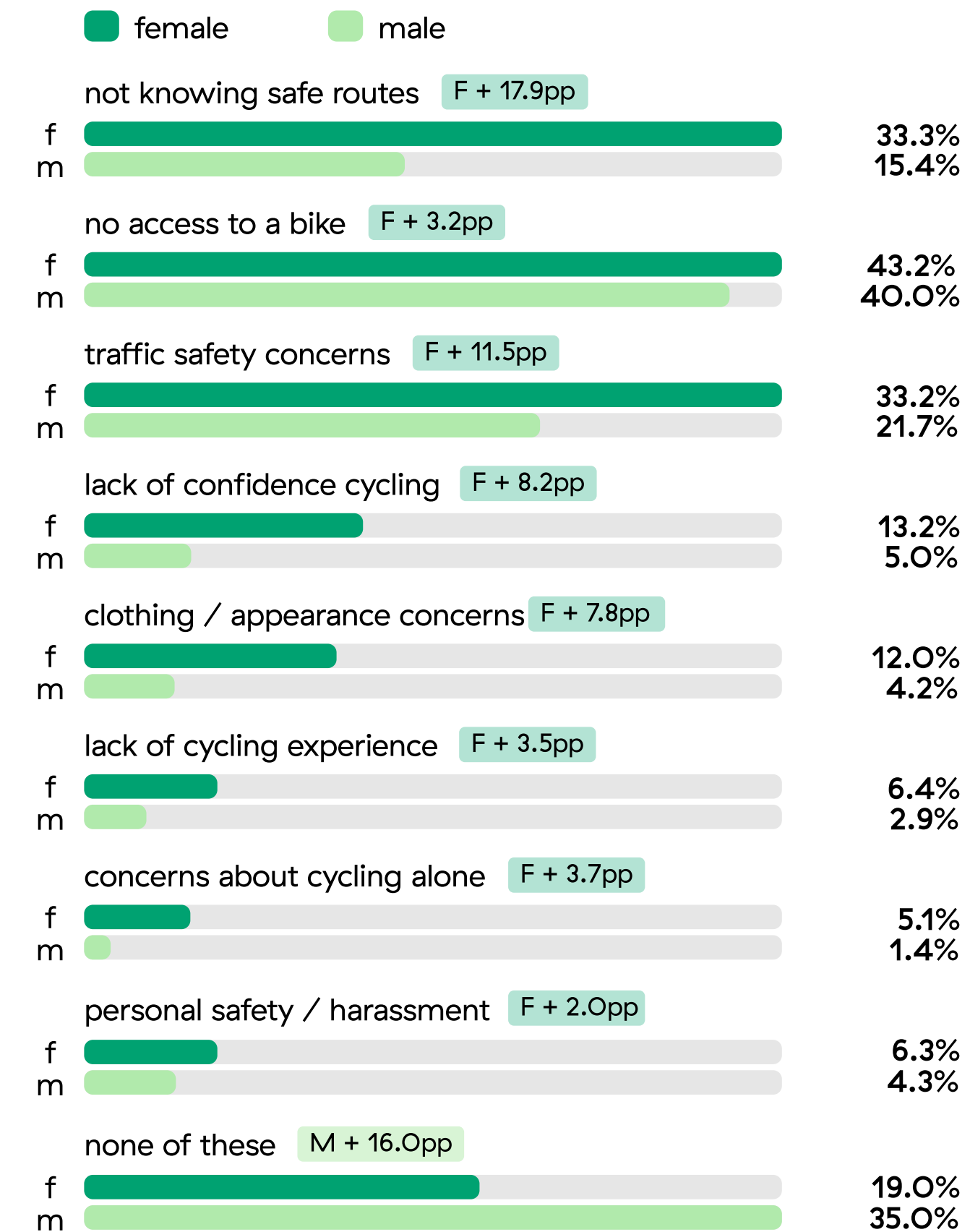
# Barriers to Entry

For many women, barriers to cycling appear before they even get on a bike. Only 19% of women said they had faced no barriers to cycling, compared with 35% of men. This means more than four in five women have encountered at least one obstacle to get on the saddle, making them significantly more likely than men to face barriers before choosing to cycle.

The biggest barrier is access: 43.2% of women said not having access to a bike had stopped them from cycling. But knowledge and confidence are also major issues. One in three women said they did not know safe cycling routes, more than double the proportion of men. A similar share cited traffic safety concerns.

These findings show that improving access to cycling for women means more than providing bikes. In line with our previous slide's findings, it means making routes feel safer, easier to understand and more confidence-building from the very first journey.

## barriers to cycling (% within gender)



# 5

key  
takeaways





# What Needs to Change?

Women's lower confidence around cycling is not simply a question of experience or willingness to cycle. Our research has found that women know how and want to cycle. However, the barriers women identify are mostly external to them: speeding motor traffic, unsafe and poorly lit routes, poor and aggressive driver behaviour and where they are forced to park their bike after dark.

To make cycling more accessible for women, we need policy change to focus on the whole journey from the decision on which route to take, to the final few metres between bike bay and destination.







### 1 safer streets, not braver riders

Women are not saying they need more courage to cycle. They are saying the roads need to feel less hostile to them. We need to fundamentally improve the safety conditions of our roads in London if we want more women to feel confident cycling via safer motor vehicle speeds, protected and well-lit cycle routes, and increased numbers of densely located, well-lit accessible shared e-bike bays across the city.

### 2 reach more women from ethnic minority backgrounds

Reach more women from ethnic minority backgrounds by working with trusted community organisations, schools, faith groups and social enterprises to better understand barriers, particularly for Asian women, and offer practical support such as ride codes, dedicated cycle training, route guidance and confidence-building sessions in familiar local settings.

### 3 the journey does not end at the bay

We know women like using Forest as it is a quick and convenient transport option. However, as more boroughs move towards mandatory parking, bay location becomes part of the safety discussion. A bay may work operationally, but might prevent some users from continuing to cycle after dark if it is isolated, poorly lit or too far from the final destination. If a bay-only model is used, they need to be densely located, visible, well-lit and close to where people actually need to go, so users are not left walking the final distance alone at night.



# Call to Action

This report shows that shared e-bikes can help more women cycle, but only if the system around them is designed with women's needs in mind. The barriers our female riders identified, traffic, poor driver behaviour, lack of safe routes, limited access to bikes and concerns about parking after dark, are not issues any single operator can solve alone. They require a collective response from boroughs, TfL, operators and community partners.

The next stage in London's dockless e-bike journey is the move towards a pan-London shared e-bike scheme. This presents an important opportunity to get the system right. A consistent London-wide approach should not only focus on managing operators, but on protecting and building on the cycling growth London has seen in recent years, including among women who have discovered cycling through shared e-bikes. Future regulation must therefore be simple, clear and designed around the rider experience.

A cohesive scheme led by TfL should provide understandable rules across borough boundaries, sensible and data-led decisions on parking and the infrastructure needed to encourage more people to cycle. That means safer streets, better cycling routes, well-located parking bays, and targeted support for communities currently under-represented in cycling.

As London develops the next phase of shared e-bike policy, women's safety, confidence and accessibility should be built into the design of the system from the start, not treated as an afterthought. Poorly designed rules risk making shared e-bikes less convenient, less accessible and less attractive to the specific groups they have helped getting into cycling.

We at Forest will continue to play our part. We will keep investing in rider education, cycle training, parking infrastructure, community partnerships, social enterprise schemes, flexible and useful payment options and a safe, accessible and convenient service.

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#### ENDORSEMENTS:



**Caroline Russell**  
*Chair of the London Transport Committee*



**Cycling UK**



**London Cycling Campaign  
Women's Network**