

**Cycle Superhighways
brand
communications
development**

09020

July 2009

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Research conducted by 2CV

Agenda



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Response to branding conventions

Response to naming conventions

Summary and conclusions

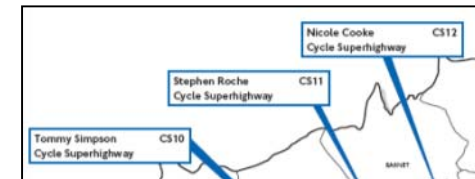
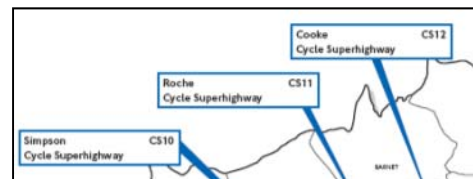
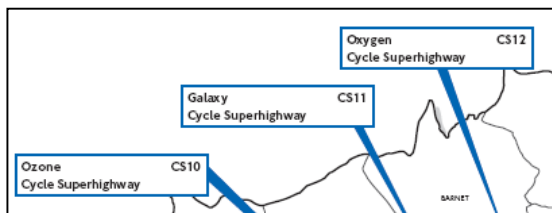
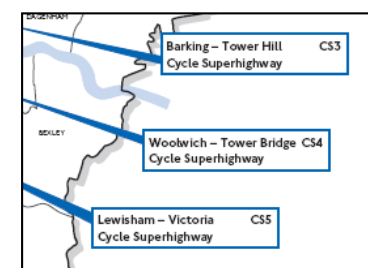
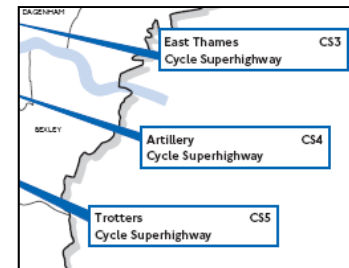
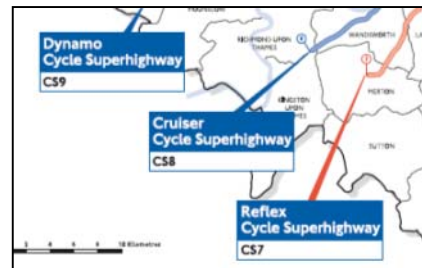
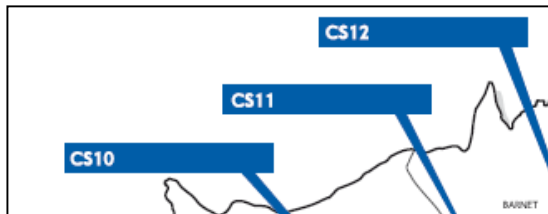
Introduction to the research

Background



- The Mayor has recently announced the first two routes of the Cycle Superhighways, due to be launched in May 2010.
- Extensive qualitative research has already been conducted to test the overall concept and specific features of the cycle superhighways.
- This new research was carried out to test the proposed branding and naming of the highways.
 - The branding (via a new logo) and the name(s) given to the superhighways, are very important in rendering the highways recognisable to potential and existing users, and distinguishing them from the rest of the London Cycle Network, as well as conveying the right perceptions of the superhighways to prospective users.

We tested six branding routes and six naming routes



Methodology and Sample

- 9 x 1 ½ hour groups with 4 people. Broken down as follows;-

	Cycling typology	Age	Location	Route
1	Regular cyclists	18-22 years	Inner London	Mix of both routes
2	Definite considerers	18-22 years	Outer London	S. Wimbledon route
3	Regular cyclists	23-30 years	Outer London	Barking route
4	Occasional cyclists	23-30 years	Inner London	Mix of both routes
5	Definite considerers	23-30 years	Inner London	Mix of both routes
6	Occasional cyclists	31-44 years	Inner London	Mix of both routes
7	Regular cyclists	31-44 years	Outer London	S. Wimbledon route
8	Occasional cyclists	31-44 years	Outer London	Barking route
9	Definite considerers	31-44 years	Inner London	Mix of both routes

Who we spoke to

A spread of typologies with very different behaviours, attitudes and needs from cycling...

Regular cyclists

- Really enjoy cycling and feel very confident
- Range of cycling behaviours/ attitudes even within the most regular: those who only use bike for commuting, to those for whom riding everywhere is second nature
- Using bikes for commuting mainly, but also for other utility (often local) journeys
 - But also using for the occasional longer distance leisure ride

Occasional cyclists

- More wedded to PT and/or car
- See cycling quite practically (exercise, cost saving, getting away from PT)
- Ranging from those who cycle mainly for leisure to those who are commuting by bike up to an hour twice a week
- Generally, would like to cycle more, but fear and vulnerability (mainly of traffic) and 'hassle factor' are key barriers
 - Lack of confidence, means they are only really cycling within comfort zone

Definite considerers (near market)

- Have been contemplating cycling for a little while
 - Some are weighing up seriously against current transport
- Noticing that more people are doing it and attracted by this
- And have mostly taken some initial steps to find out more – esp. from other people they know who cycle, and a few have looked online for routes
- Fear and vulnerability of traffic, along with lack of confidence are key barriers

Response to Cycle Superhighways

NOTE ON APPROACH

The remit of this research was not to evaluate the Cycle Superhighways themselves, since another large Qual project already covered this...

- We did however test response to Cycle Superhighways quite briefly, in order to be able to fully contextualise the branding and naming routes.
- The way we did this was:
 1. Tested spontaneous awareness of CSH
 2. Perceptions of CSH based on the name alone
 3. Perceptions of the CSH based on fuller description of the concept from TfL website and some images of what they might look like

Overall, little awareness of Cycle Superhighways yet

- Most had not heard the name Cycle Superhighways before – nor were they aware of the concept
- Only some of the more regular cyclists (who keep an eye out for new cycling comms and initiatives) had heard about Cycle Superhighways
 - A few had heard from the press and one or two had come across them on the TfL website
- But for them, the concept was better remembered than the name itself
 - The name Cycle Superhighway was not spontaneously remembered by anyone
 - The concept was vaguely but positively remembered along with other upcoming initiatives such as cycle hire scheme, and the current PR around cycle parking
 - And it contributes to sense that TfL is investing in cycling – amongst cyclists

Cycle Superhighways name can polarise slightly and set expectations too high

- Initial expectations are positive emotionally:
 - Sounds like it will facilitate cycling in London
 - A sense that TfL is doing ‘something significant’ for cyclists
 - Sets up sense of a ‘cycling movement’ beginning (esp. amongst occasional cyclists and considerers)
 - Sound direct and faster to get to where you want to
 - Imagine they’ll be arterial – easily linking up with other cycle routes
- However, the word ‘superhighway’ does have some negative connotations
 - Can feel too fast (for considerers)
 - Potentially too busy (esp. for regular cyclists)
 - Sounds American – which can be slightly alienating/foreign

Branding and naming will need to work hard to soften ‘Superhighways’ name

Cycle Superhighways name can polarise slightly and set expectations too high

- Initial expectations are positive emotionally:
- However, the word 'superhighway' does have some negative connotations

"I guess they must know that there are lots of people wanting to cycle in London... otherwise they wouldn't be investing in them"

"I like it... sounds like they will be direct routes that are dedicated to cyclists"

"It looks as if cyclists are finally being considered seriously..."

"oh cool, like in Germany where you get the separate lanes for bikes"

"That word Superhighway seems pretty odd... It sounds like a really big, busy American road, so I can't quite understand the relationship with cycling"

"Superhighway sounds really fast and kind of futuristic... I think that actually scares me from trying to cycle in central London"

Cycle Superhighways name can overpromise

- However, positive associations of Cycle Superhighways may be, the name could set TfL up for a fall
 - Highways implies something very different to current cycle lanes...
 - ...'Super' just exaggerates this
- Feels like it promises a lot, but the concept doesn't deliver on this promise
- A minor disappointment for most, but can feel like a real cheat to some

"With that name I imagined that they have to be purely for cyclists and there wouldn't be a car in sight ..."

This is just trying to make them (GLA) look really good without really doing much

They should just call these really good cycle lanes

Oh right, I thought these were going to be separate roads or something

With such little salience of Cycle Superhighways as a name (and given the negativity and over-promise around it) is there scope to consider alternative options without being seen as a u-turn?

Overall CSH concept feels like a step in right direction for cycling in London, but better segregation from traffic is imagined

- On testing concept (with description from website and images), people are initially positive and can imagine using them
 - Very visible blue lane gives a sense that it would make cycling a little safer and more appealing
 - Imagine it's not just about commuting – but utility journeys in general
- However, this is counteracted by disappointment at lack of full segregation from traffic
 - Lots of questions arise around how the traffic will remain segregated from the CSH; imagining everything from cat's eyes, to enforced double yellow lines, to penalty fares, to raised borders/roads
- Also, imagining the need for good maps, bike lockers on the way and even bike hire scheme

Suggests that branding will be really key in deterring traffic from entering Cycle Superhighways



Occasional cyclists and those definitely considering taking up cycling are the key targets – *corroborating previous research*

- For occasional cyclists CSHs go some way to assuaging their biggest cycling concerns
 - Increased segregation from motorists addresses their feeling of *fear and vulnerability* around other traffic (to some extent)
 - Navigational benefits of very visible direct route addresses their *lack of confidence* around how/where to cycle
- The ‘near market’ (those definitely considering taking it up) feel that CSHs positively address their key concerns – and most want to at least try out the CSH
 - Seen as credible sign of TfL caring for /investing in cyclists – addressing their *infrastructural concerns* and *lack of confidence* to some extent
 - Visible physical presence acts as a sign of mass-movement around cycling
 - Addresses their *safety concerns* (literally), although felt it could go further

Branding and naming needs to further position the CSH as serious, consistent, easy, and for everyone

Regular cyclists are interested but not hugely motivated

- For regular cyclists here is some sense of care and investment in cycling (for the first time) by TfL – especially amongst longer-term cyclists
- Appreciate some practical benefits of CSH
 - Expect improved and better maintained road surfaces
 - And navigational benefit – Esp. those reliant on bike for more ad-hoc utility journeys (outside regular commute)
- However, sense that CSH will not have huge effect on daily cycling behaviour
 - Already know the best route (esp. for daily commute)
 - Already used to cycling how/where they want without many issues/rules
- If anything a few of them can be slightly sceptical about being marginalised, either by TfL telling them where to cycle, or by drivers feeling they no longer belong on the roads
 - *“As long as I’m not banned from cycling on the road if I want to”*
 - *“It does mean that if I cycle on the road drivers will be like “he shouldn’t be there”!*

While regular cyclists are not key target for CSHs, branding and naming will still need to ensure it doesn’t alienate them by making CSHs feel like they are only for less the confident

Summary of key benefits of CSH for the different audiences

<ul style="list-style-type: none"> ■ Cycling considerers 	<p>RECOGNITION</p> <ul style="list-style-type: none"> ■ TfL investing and looking out for cyclists ■ Indicates a critical mass of cyclists on the street 	<p>SAFETY</p> <ul style="list-style-type: none"> ■ Slightly more recognition on the roads ■ Specific lane increases perception of safety 		
<ul style="list-style-type: none"> ■ Occasional cyclists 			<p>ROAD MAINTENANCE</p> <ul style="list-style-type: none"> ■ Smoother roads ■ Better signage 	<p>NAVIGATION</p> <ul style="list-style-type: none"> ■ Continuous ■ Easier to follow routes across London
<ul style="list-style-type: none"> ■ Regular cyclists 				

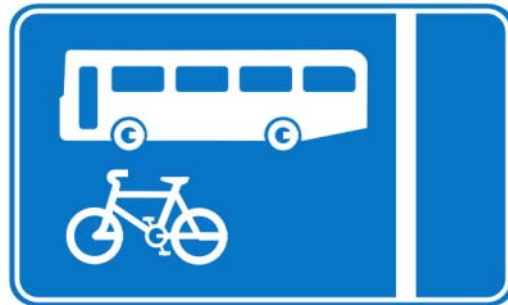
Expectations around branding of Cycle Superhighways

Examples of 'good' road branding and signage picked out

N.B. We asked people to remain more aware of road signage prior to the groups and pick out some examples of what they thought were effective road signs...



"A road sign just needs to be clear and to the point... The simpler the better"



"The bus lane sign couldn't be" clearer



"Doing this exercise made me realise how great the 'motorway logo' is... Whoever came up with that is a genius"



"The London cycle network signage is pretty obvious isn't it... I mean, it's just a bike and an arrow"

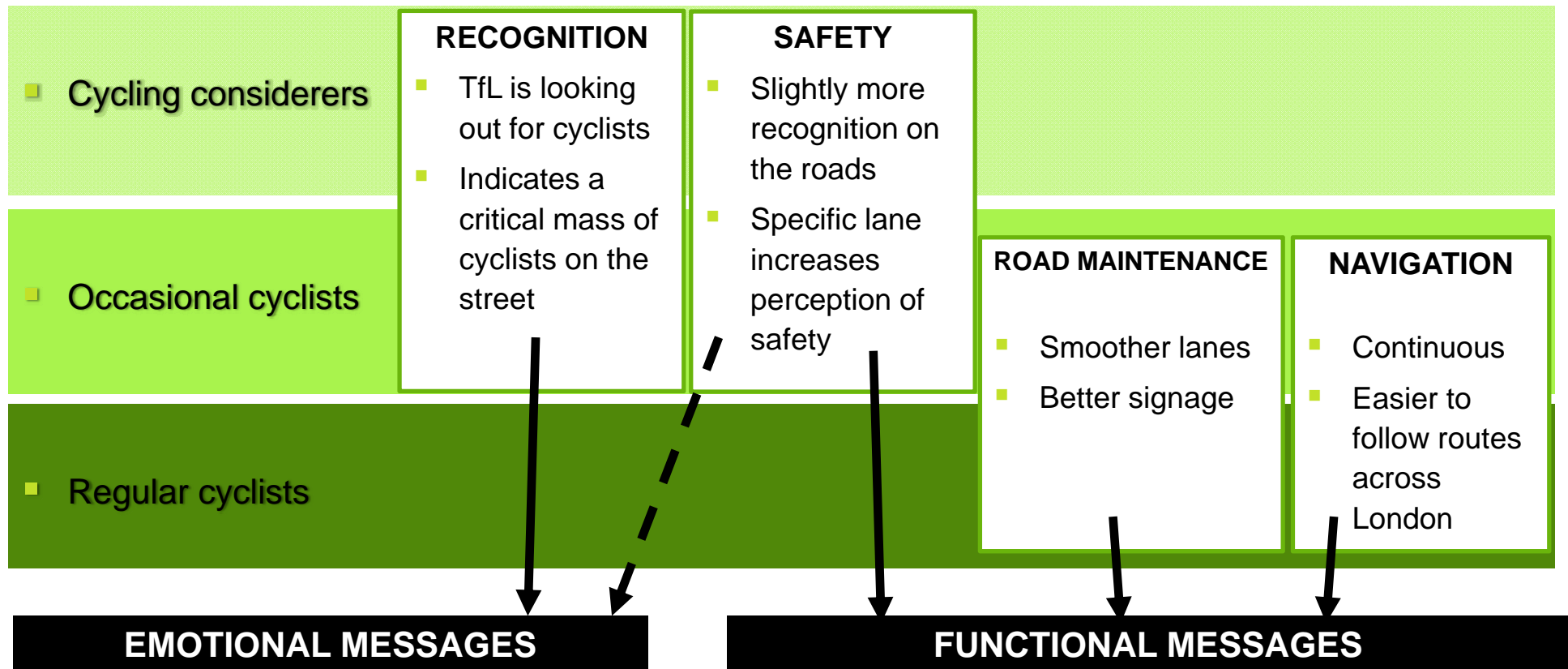
Crucially, examples picked in homework show that people want to be able to know what a sign is telling them at a glance (*although there is an obvious element of familiarity built up over time*)

Criteria for judging road branding and signage

- The key principles picked out for good road signage were:
 1. **A clear message** that is instantly understood and un-ambiguous
 2. **Simple and uncluttered** – respondents often mention that the simpler a sign is the better – and the clearer it comes across
 3. **Consistent with other road signage** - people have learned the language of road signs, understand them and can recognise them at a glance When they go against this idiom it seems that they risk:
 - Not being clear/ not being as easy to read as signs people are used to
 - Inadvertently seeming as though they are not part of the road network

Interestingly, these principles are all very functional and people do not spontaneously talk about more emotional rules/principles

What the CSH branding needs to do for the different audiences



For Cycling Considerers and Occasional Cyclists there is an emotional role for branding, however, functionality plays a larger role across all audiences

In summary, new CSH branding needs to strike a balance

Functional messages - firstly

- Be immediately **discernible and clear** – non-ambiguous
- Communicate **seriousness** to drivers – to keep them segregated
- Be **representative** of key **CSH benefits** and **uses** – i.e. direct and continuous routes for ‘utility’ cycling
- **Fit with** what people expect to see from **road-side signage**



Emotional messages - secondly

- Provide **positive image** for TfL
- Position cycling as **mass movement**
- Communicate CSH as something **new and different** from other cycle networks in London
- Say ‘**Cycling is for me**’

In summary, the new branding needs to meet a careful balance between functional and emotional messages – ideally addressing functional messages first and foremost

Evaluating the branding routes

Overview of response to branding routes

- The routes directly and clearly alluding to cycling are working best overall:

- Act as clear cycling symbol to cyclists and motorists
- Positioning cycling in a positive way: mass movement and friendly
- Make CSH feel inclusive (for everyone), friendly and social
- Feel quite unique



- Other routes felt to be confusing:

- While these routes feel differentiated from current signage, it's not immediately clear what they are about
- Not felt to immediately relate to cycling, only on deeper reflection
- Risk being confusing as signage and annoying as branding
 - Sense that motorists would not take them seriously as piece of road branding
- Risk marginalising cycling even more



Worst received branding

On an emotional level

X

- Feels cluttered and unclear
- One or two connected it to 'freedom' – but even this feels more leisure-related
- Sense that it is trying to be simply too creative and can come across as gimmicky
- Potentially alienates cyclists even more

On a functional level

X

- No functional elements at all
 - Most cannot see connection to cycling in any way and feel that this would simply confuse people
- Sense that motorists especially wouldn't take CSHs seriously with this logo



Worst received branding

On an emotional level

X

- Again, most do not instantly understand what this is meant to be
- One or two who did visually understand it (eventually) did not understand what this is saying about cycling
- Closest to other TfL branding – esp. congestion charge and roundel

On a functional level

X

- Feels more aimed at drivers (about cars)
 - Confusing with car related safety initiative (e.g. seatbelt sign or even congestion charge), than associating it with cycling



Worst received branding

On an emotional level

-

- Instantly associated to Olympic branding – positively London-oriented
- Childlike qualities that can highlight fun and enjoyment for some – although simply feels childish for others
- Feels unique (esp. coming from TfL), but more related to health and leisure signage than road signage

On a functional level

X

- Again, many don't associate with cycling straight away
- Not seen as clear and serious enough to be able to keep motorists out of CSH
- Not representative of the CSHs as it is felt to be more oriented to leisure and/or children



Better received branding

On an emotional level



- Positions cycling as mass movement
- Makes CSH feel inclusive (for everyone), friendly and social
- Feels quite unique and different especially in terms of road signage and TfL branding
- But, can risk looking too family and leisure – oriented
 - Which alienates some regular commuter cyclists

On a functional level



- Not instantly discernible to motorists
 - Can feel a little too cluttered and confusing on first sight
- Can feel a little too casual – not representative of what CSHs are
 - Goes against the 'purposeful', 'direct' nature of them



Winning route of those tested

On an emotional level



- Feels differentiated from other cycle networks and unique for TfL
 - Due to different visual (curvy) character
- Casual visual style makes cycling feel friendly and inclusive (for considerers esp.)
 - But, ponytail makes it feel like it is for females only

On a functional level

- Clear and to the point
 - Clearly communicates this is about cycling to motorists and cyclists
- But, goes slightly against established road signage (esp. on the road) which can marginalise cyclists from other road users
 - Could be slightly off-putting for regular cyclists - who feel cycling isn't being taken seriously
 - Respondents worry drivers might not take it seriously
 - We know (from previous research) that motorists can be sceptical - this could give even more reason to be



While this was the preferred branding route, there was a sense that it should include a slightly more serious tone...

Response to DfT branding

- Although this wasn't tested as a potential new piece of CSH branding, it was clearly the preferred branding by all:-
 - Very familiar as a piece of branding - immediately says this is a lane for cyclists
 - Universal and devoid of ambiguity – e.g. not just for leisure riders, for kids, for women, etc. (as is seen with other examples)
 - Serious and positions CSH as a more integrated part of the road – felt to be esp. important for communicating to motorists to 'keep out'.
 - In this sense, it most credibly communicates that cyclists are sharing the roads with motorists



DfT branding emphasises how respondents really just want something which is really functional, quite familiar and easy to read

More learnings from DfT branding route

- The road and side signage should ideally be the same
 - A disconnect between the road branding and the side signage can cause confusion and visual clutter (and potentially negate any respect gained from the DfT road logo).
- Having the CSH code names on the road is consistently appreciated (as a means of further recognition and navigation).
 - But would this be possible in accordance with DfT guidelines?



“My friends who drive say half the battle is just seeing cyclists on the road – it’s like we come out of nowhere and then it’s too late. I’d imagine cars will be less likely to cut me off if they see the blue”

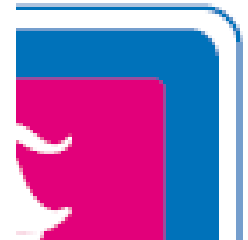
What else really works in the branding

- Respondents mentioned some other elements that work very well for CSH branding

- Everyone was very positive about the **blue on the road** itself and they felt it acts as a strong branding device in its own right
 - Clearly highlights continuity, navigation and investment
 - Implies TfL cares



- Most felt that the **fuchsia pink on the logos** (esp. in combination with the blue and white) creates a very positive visual identity
 - Creates stand out and differentiation
 - Feels emotionally engaging, exciting



Strong colours act as a very powerful form of branding, adding both emotion and functionality in this context

Moving forward with the branding

- On a functional level (which needs to be met first and foremost)
 - Combination of DfT logo on road and continuous blue lane work together as a serious signal to other road users that cyclists have a right to be on the road
 - Sets up a sense of respect and sharing of the road between cyclists, buses and motorists
- Branding should be consistent between road and signage, but also in relation to other road signage
 - To avoid alienating cyclists on the shared roads even more so than they are now
- In order to satisfy the branding objectives, we recommend ‘sneaking in’ some fun and differentiation, without negatively impacting on the simplicity and functionality as signage
 - The continuous blue lanes combined with fuchsia on logo/signage makes the CSH feel different and new

Evaluating the naming routes

Overview of response to naming routes

- The naming routes that are working best are quite functional
 - Logical/simple and easily understood
 - Help support the core benefits of the CSH in 'helping navigation'
 - Fit in with other transport/road naming conventions



CS12	
East Finchley – Angel	CS12
Cycle Superhighway	
Olympic	CS2
Cycle Superhighway	

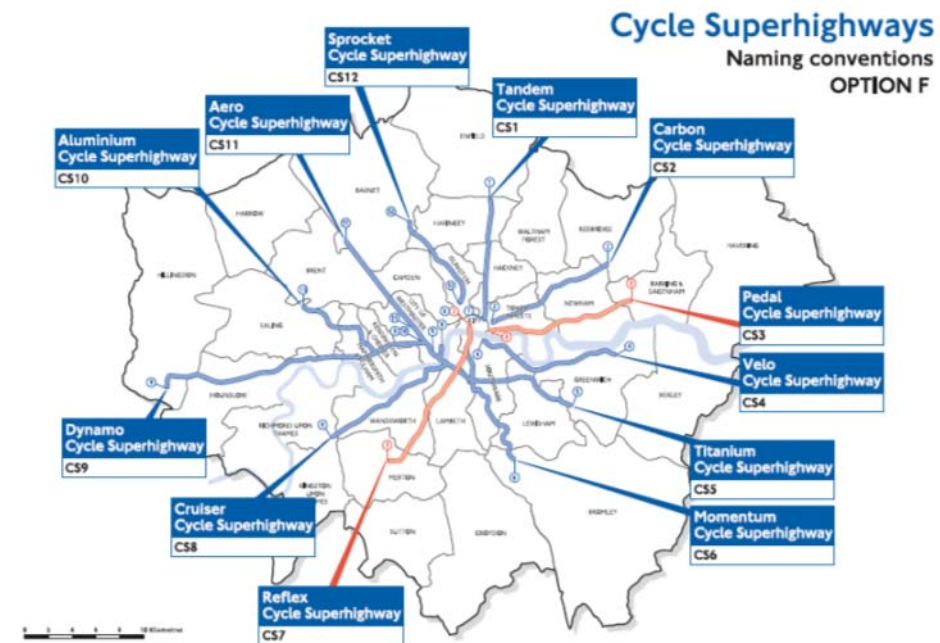
- Other routes were generally felt to have numerous issues:
 - Not immediately clear what they are about – can be confusing
 - Not instantly associated with cycling or London
 - Can trivialise the branding – making it feel too playful and gimmicky
 - Not serious enough
 - Can feel slightly geeky – for those who really know about cycling
 - Potential to marginalise cyclists more



Sprocket	
Cycle Superhighway	
CS12	
Galaxy	CS11
Cycle Superhighway	
Victoria Pendleton	CS7
Cycle Superhighway	

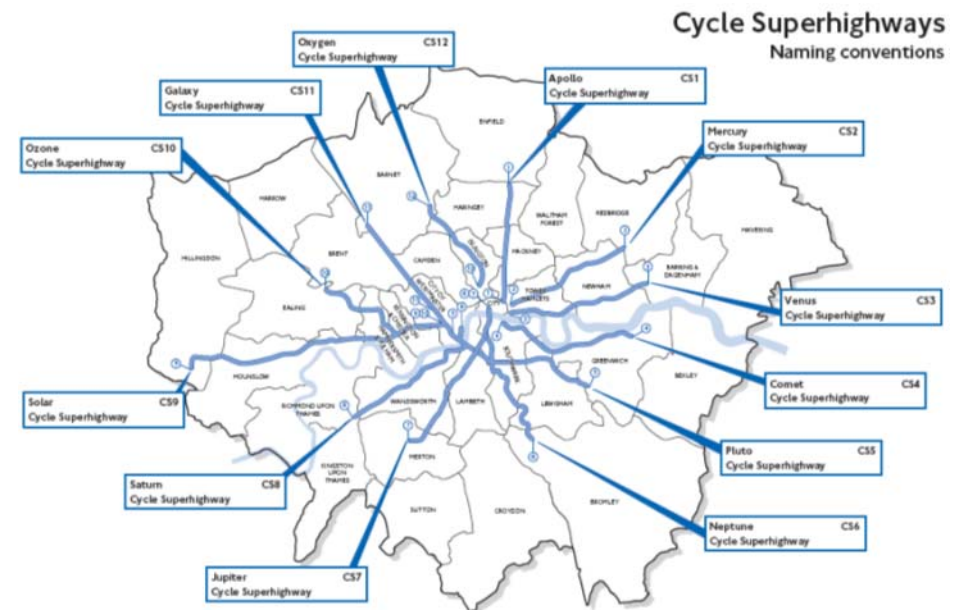
Worst received naming routes – Bike parts

- Whilst the connection with cycling is very obvious, many don't know what the names mean
 - Can feel geeky – for bike enthusiasts
- Has a playful child-like element – which would be more suitable to a kids' playground, but not a serious cycling route
- Feel a little haphazard and inconsistent – mixing types of bikes and bike parts
- Can sound very weird to say you are riding on the 'pedal', 'sprocket', 'titanium'



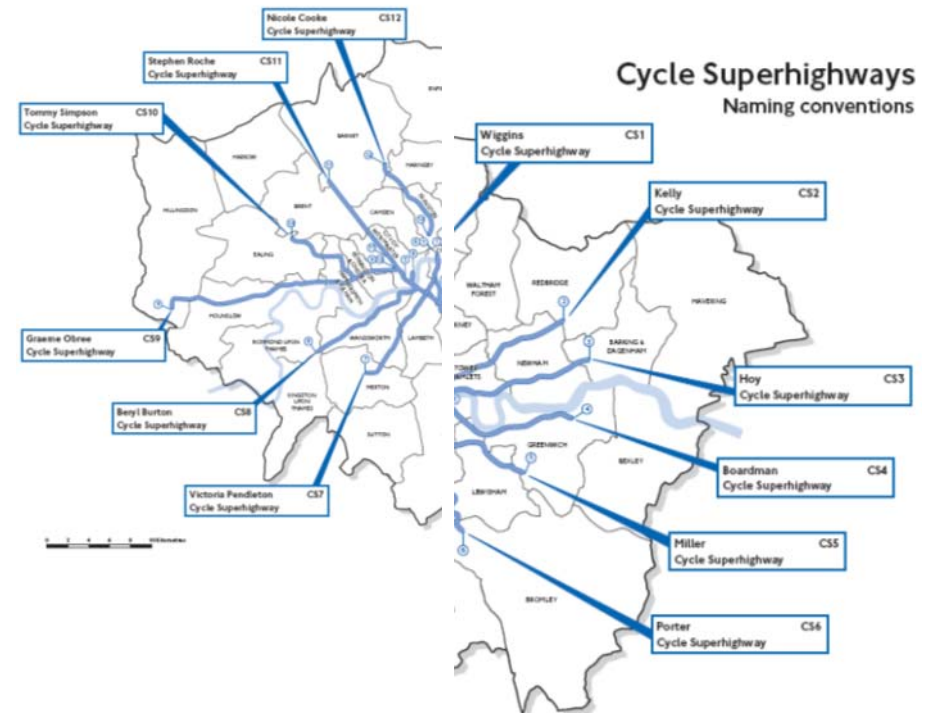
Worst received naming routes - Galaxy

- As with previous route, it can sound a little child-like. Gives sense that CSH are targeting kids
- For some, it is felt to loosely convey green message, which they associate with cycling
- But, most are confused by lack of obvious relevance to London or cycling



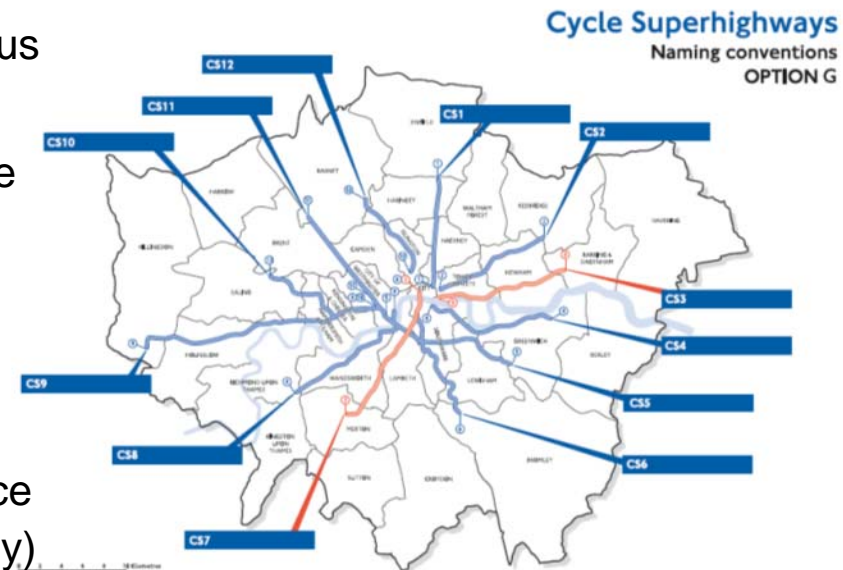
Worst received naming routes – Famous cyclists

- People have never heard of most of these cyclists
 - Cycling is still not a high-profile enough sport
 - Can feel geeky – for lycra-clad cycling enthusiasts
- Can be pretty sceptical: mentioning doping around cycling and potential for better cyclists to emerge and need to replace these
- Can work quite positively in Olympic context
 - But imagine it would be better if it were famous athletes or footballers – more impactful and memorable
- Surnames work better than full name, which can be too much of a mouthful



Best received naming routes – Route codes

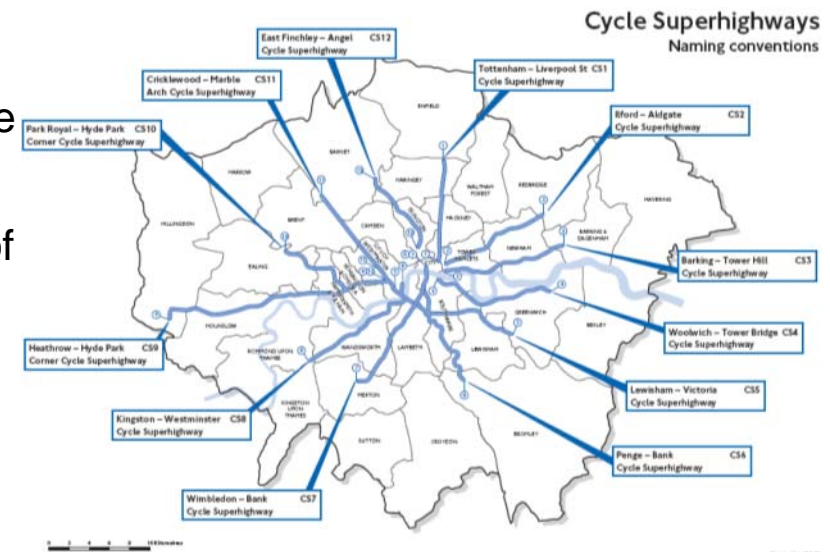
- Very positively received by most
 - Feels familiar as road naming – instantly related to bus route naming or motorway naming conventions
 - People can imagine using these names to refer to the routes - act as a very quick and easy reference
 - And felt to be easy to integrate into the road signage (either on road or on signs) without cluttering it
 - Especially where CSH routes merge in Central London
 - The round the clock-style ordering is appreciated once it's explained (but most wouldn't notice spontaneously)
- However, can feel a little too basic for most
 - Sense that it should work with another name first



While people can imagine using this as a quick and easy reference it is felt to need a slightly more emotional name first

Best received naming routes – A to B

- Felt to be the most effective functionally
 - Felt to be the most familiar for Londoners
 - Many spontaneously imagined this option (before shown it)
 - Clearest expression of direction/navigational benefit of CSH
 - Actual names make it feel official/serious
 - No risk of trying to be ‘too clever’ or gimmicky



“Hey presto... This is just what they need to do as a cyclists... Tell me where it’s taking me”

“It’s not exactly exciting, but it’s the most effective I think”

“It’s just what I thought it needs to be... Straight to the point”

Best received naming routes – A to B

- But this could have some important logistical issues
 - Can be too much of a mouthful to say/be referred to as
 - Lacking emotion - possibly a bit too obvious/dull
 - If joining route mid-way, A-B can be slightly confusing
 - In terms of what it will look like on overall sign
 - People responded well to the location with times to get there - So, if going to have this on the signs, sense that it would over-clutter the signs and it would make the functional benefit of the location in the naming redundant



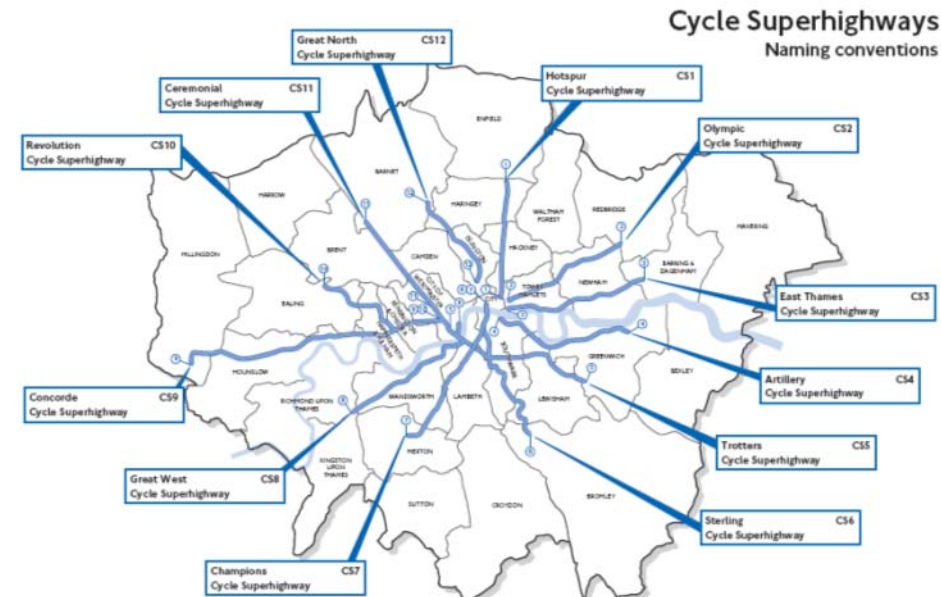
“It would just look confusing if it had 4 different names on there... As a cyclist you want to be able to look at it and quickly get it”

“While I do like what it is doing, I don’t think I’d say I’m taking the Barking-Tower Hill Cycle Superhighway... It’s just a bit longwinded”

Best naming route description-wise, but could be complicated logistically

Winning naming route – Area associations

- This route was consistently well liked
 - Works on a more individual level – people subjectively picking out different names as favourites
 - Often associated to some of the underground naming, which is very positive
 - Feels location-based and London focused – can give a sense of pride in the CSH



Winning naming route – Area associations

- While there was felt to be some inconsistency (mixing up 2 different naming conventions in one system), this was not felt to be an issue if the right combination is struck
 - Directional (Great North, East Thames, Great West)
 - People like this the most as it is clear and to the point, and it clearly highlights the navigational benefit of the CSH
 - Area associations (Olympic, Champions, Concorde)
 - People do appreciate these as they provide a level of emotional involvement and are felt to be the most catchy
- However, some names were felt to be a little too random (Stirling and Ceremonial) or gimmicky (Trotters)
- Also, although Hotspur was one of the favoured names, it has potential for controversy (even vandalism by Arsenal fans)



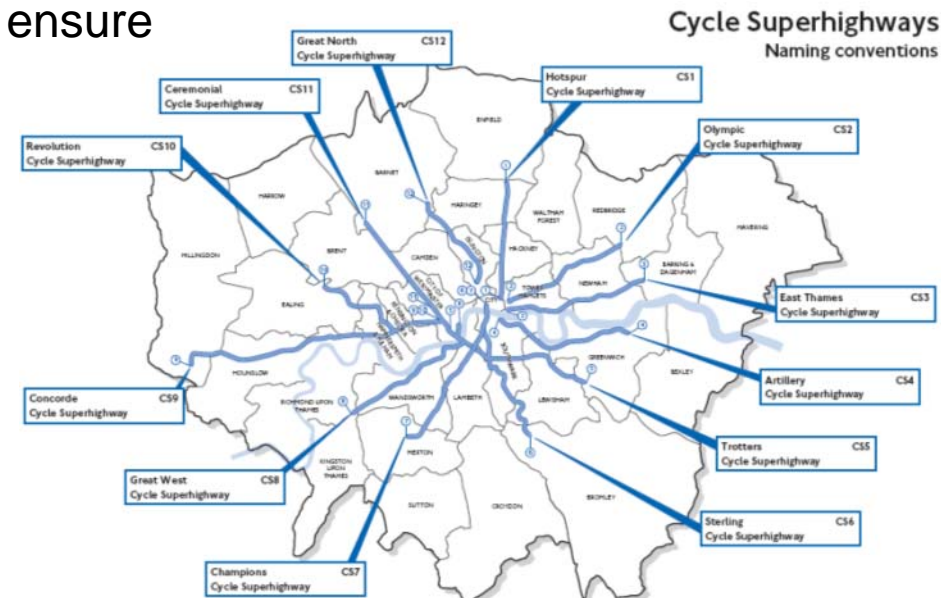
“A lot of these names are really good. they are definitely my favourite option... But there are a few names in there that let it down. .. I wouldn't know what Ceremonial refers to”

This feels like the most interesting and emotionally involving naming route, but some of the names will need developing...

Moving forward with this naming route

- In developing names for this route, TfL should ensure that names are

- Evocative/more representative of an area
- Obviously London-based
- Not too gimmicky or trying to be too humorous
- A sense of direction would help
- Avoid anything potentially polarising



"I guess it's easier said than done, but as long as it's something that people will recognise from that area... Something like the East End route. But please don't try to be too humorous as it just comes across as a cheap gimmick"

Moving forward with the naming

- We would recommend using the Area associations route (Olympic) in combination with the Coding route (CSH1)

CS12

- Acts as simple reference point (esp. for all routes together) and fits with other road signage
- Could effectively address the issue of numerous routes merging in Central London
 - Acts as simplest form of visual representation on signage
- Could work effectively as on-road signage (if this is allowed by DfT) – to aid navigation



Olympic Cycle Superhighway CS2

- Provides emotional resonance (in relation to area and London) – making CSH feel more inclusive and friendly
 - Esp. important if using more functional DfT logo
- Communicating CSH as something new and different
- Provides some navigational benefit of the CSH
- Provides positive image for TfL

Summary: bringing it all together

Messages addressed by optimal combination of naming and branding

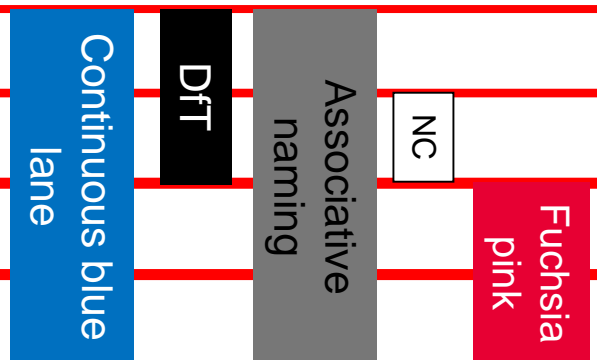
Functional messages - firstly

- Be immediately **discernible and clear** – non-ambiguous
- Communicate **seriousness** to drivers – to keep them segregated
- Be **representative** of key **CSH benefits** and **uses** –
i.e. direct and continuous routes for ‘utility’ cycling
- **Fit with** what people expect to see from **road-side signage**

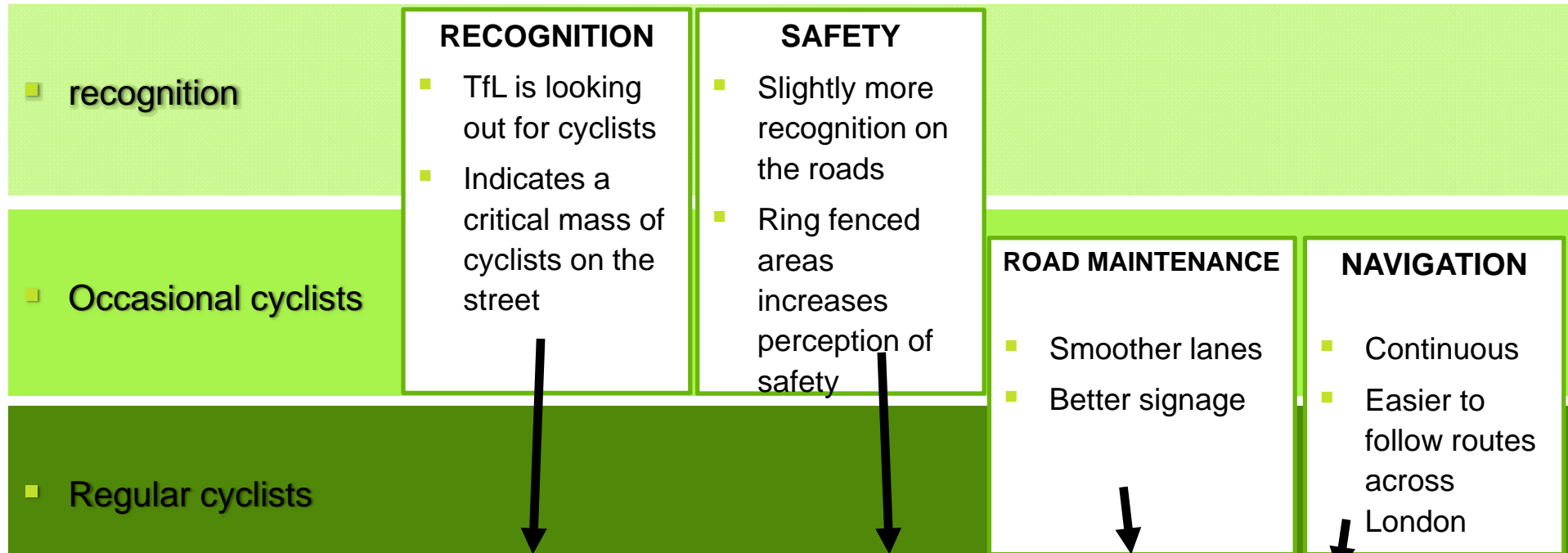


Emotional messages - secondly

- Provide **positive image** for TfL – looking out for cyclists
- Position cycling as **mass movement**
- Communicate CSH as something **new and different**
- Say '**Cycling is for me**'



Optimal combination of naming and branding to highlight benefits of CSH for the different audiences



Fuchsia pink of sign

Area associations naming

Naming codes

Continuous blue lane

DfT branding

Some key questions/issues for consideration

- What happens in central London, where some of the routes come together? How can naming/branding be most effectively applied to resolve this issue?
- How can we ensure the signs are not too cluttered?
 - People feel the locations and amount of time to get there act as a very useful navigational tool (expecting one close location and one further away) – given this, the route naming can be simpler.
- Having the CSH code names on the road is consistently appreciated (as a means of further recognition and navigation). But would this be possible in accordance with DfT guidelines?



Angel	45 mins
Liverpool St	1 hr

