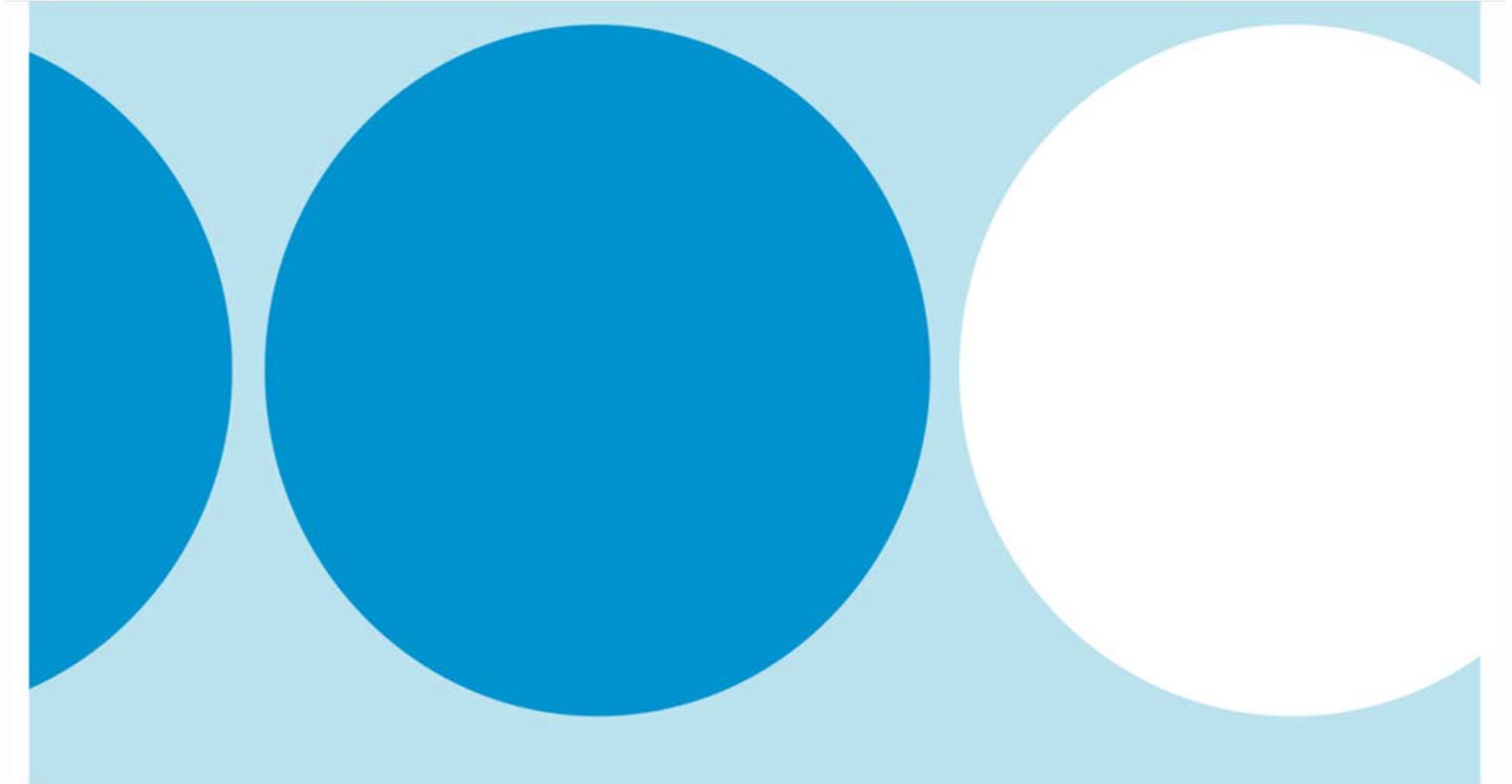


Ride London Travel Demand Management Campaign Report 2015



Contents

1

Background and summary 03

2

Awareness of events 11

3

Impact of events 24

4

Behaviours 48

5

Attitudes 57

6

Ad and PR awareness 71

7

Campaign recognition 77

8

Road signs/ drop in centres 84

9

Diagnostics 89

10

Methodology 94

11

Appendix 96

1

Background and summary

Background

In Summer 2015, the Prudential RideLondon cycling events took place for the third year over the weekend of 1st and 2nd August. The events required many roads and bridges to be closed and bus routes to be diverted in London and Surrey.

In order to minimise the impact of the closures and diversions on London and Surrey residents, TfL launched an advertising and communications campaign, aiming to raise awareness of the events and encourage people to plan ahead.

This research evaluates the effectiveness of the communications campaign against a number of objectives including awareness of and attitudes towards the events, intended and actual behaviours.

The research was conducted among residents of boroughs in London and Surrey potentially affected by the events and took place in 3 waves – 1) before the campaign broke, 2) during the campaign (but before the events), and then 3) immediately after the events took place:

Research timings

8th – 12th June pre-campaign

15th – 23rd July mid-campaign (pre-events)

3rd – 7th Aug August post-campaign (post-events)

Base sizes per wave:

500 Pre-wave

499 Mid-wave

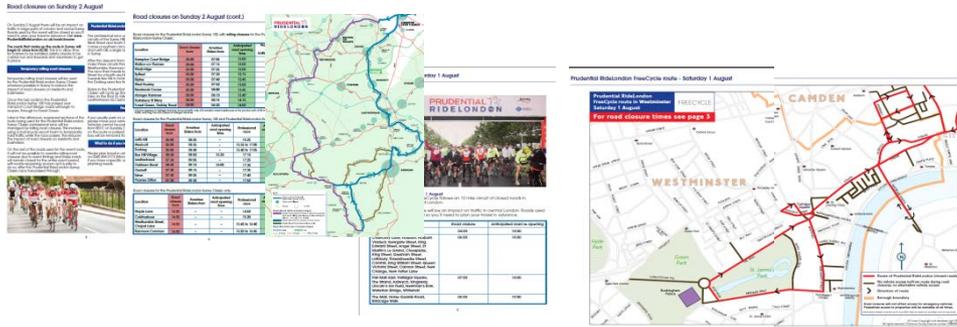
501 Post wave

The campaign started on June 26th. Following the changes to the Surrey 100, Surrey Classic and Freecycle routes this year, interviews were also conducted in Camden and Southwark.



Background – campaign materials – total spend: £217 (Source TfL)

Leaflets (new graphic in 2015)



Windscreen flyers (similar graphic to 2014)



Bus Diversion notices (new)



Bus rear (similar graphic to 2014)



Poster (similar graphics to 2014 and to press ads used)



Radio (similar to 2014)



Summary (1) - Awareness, Understanding, Attitudes & Behaviour

Awareness

As in previous years, awareness of the RideLondon events grew with each wave of Research. More than 6 in 10 residents in affected areas had heard of at least one event before they took place, this increased to circa three quarters by August. The strongest increases in awareness were seen this year for the 'London-Surrey 100' and 'London-Surrey Classic' events between July and August. In each case, campaign recognisers were significantly more aware of each event than non-recognisers, suggesting the campaign activity supported their awareness. However, awareness of Grand Prix and Freecycle did not increase particularly, unlike last year.

Understanding the impact of the events

As last year, awareness of the extensive road closures increased significantly over the waves. Stated understanding of the impact of the events rose following the advertising campaign, with the proportion of affected residents saying that they understood the impact 'very well' rising to 25 per cent (from 21 per cent) by August, with 69 per cent understanding 'very' or 'quite well'. This was, however, significantly lower than last year's results (78 per cent).

Attitudes

In June, there were high levels (78 per cent for each) of understanding in terms of needing road closures, bus diversions and parking restrictions for the event. However, each of these decreased prior to the event taking place, notably understanding for parking restrictions dropping from 78 per cent in June to 65 per cent in August. Post event, only 4 in 10 residents agreed that TfL had done a good job of minimising disruption - significantly lower than last year. Nevertheless, in each instance, understanding was greater among campaign recognisers, again indicating a positive contribution from the campaign.

Behaviour

Post-event, 34 per cent of affected local borough residents in August claimed to have changed their travel plans. A similar percentage, 32 per cent, said they had used alternative routes / transport and 56 per cent said they avoided the areas on the day. 15 per cent claimed to have attended the events. Overall, stated behaviour was very much in line with 2013 and 2014 results.

Summary (2) - Communications

PR & general awareness

The proportion of residents in affected boroughs who said they recalled advertising generally about the road closures rose significantly with each wave of research: 14 per cent, to 29 per cent, to 41 per cent. The 41 per cent seen post-event was lower than seen last year (49 per cent).

Recall of other information about the road closures (due to the events) also increased with each wave of research: 19 per cent, to 42 per cent, to 59 per cent, the latter slightly lower than the 62 per cent seen last year – probably boosted by the similarity in content to previous year. Again, levels were higher among campaign recognisers.

Recognition

Already by July, claimed recognition (of any ad) was high at 44 per cent. This increased further, to 57 per cent in August. However post-event campaign recognition is slightly lower than last year (62 per cent in 2014), possibly due to the decrease in media spend this year from £400k to £217k. Several of the individual ads (i.e. poster, leaflet and bus rear ads) were recognised by 30 per cent or more respondents in August.

Diagnostics

Among campaign recognisers, comparing July 2015 with July 2014 (i.e. mid campaign), reaction to the ads was as positive as last year on several statements. However, there was less agreement this year on five: telling people how they/their journeys would be affected; where to go for information; clarity of topic; relevance; making people stop and think.

Road Signs/ bus diversion notices

The proportion of affected residents who said they had seen warning signs on the roads rose from 30 per cent in July to 39 per cent in August.

15 per cent claimed to have seen the bus diversion notices – of those who saw them eight out of ten found the notices easy to understand.

Overall summary of Key Performance Indicators

KPI		Jun-13 (%)	Jul-13 (%)	Aug-13 (%)	Jun-14 (%)	May-14 (%)	Aug-14 (%)	Jun-15 (%)	Jul-15 (%)	Aug-15 (%)	Target* 2015 (%)
Awareness & Recognition & campaign awareness	Awareness of any events Total	41	66	82	49	55	74	61	65	74	74
	General ad awareness of road closures Total	12	36	47	10	29	49	14	29	41	Pre-event: 29 Post-event: 49
	Campaign recognition Total	-	53	65	-	44	62	-	44	57	Pre-event: 44 Post-event: 62

*Targets are defined as per the TfL Marketing & Communications RideLondon TDM brief
Base: total (residents of affected boroughs) (Jun-15 (500) Jul-15 (499), Aug-15 (501))

Target met / Close to target / Target not met



- Significant difference between recognisers and non recognisers
- Significant increase wave on wave
- Significant decrease wave on wave

Overall summary of Key Performance Indicators

KPI		Jul-13 (%)	Aug-13 (%)	May-14 (%)	Aug-14 (%)	Jul-15 (%)	Aug-15 (%)	Target * 2015 (%)	
Attitudes	I understand why there needs to be road closures (NET: Agree)	Total	77	75	77	77	74	70	78
		Recognisers	83	85	83	86	85	80	-
		Non-recognisers	71	→ 58	73	→ 62	64	56	-
	I understand why there needs to be parking restrictions (NET: Agree)	Total	77	75	76	76	72	→ 65	78
		Recognisers	83	84	84	85	79	76	-
		Non-recognisers	69	→ 59	70	62	66	→ 50	-
	I understand why there needs to be bus diversions (NET: Agree)	Total	80	77	77	76	73	69	78
		Recognisers	84	86	86	83	81	80	-
		Non-recognisers	74	→ 60	70	64	66	→ 54	-
	TfL is doing a good job of minimising disruption by helping with planning and communicating alternatives (NET: Agree)	Total	45	51	54	53	51	→ 39	53
		Recognisers	62	63	64	64	65	→ 48	-
		Non-recognisers	26	29	46	→ 35	40	→ 26	-
	I am looking forward to these events/ enjoyed these events (NET: Agree)	Total	33	34	33	37	31	30	-
		Recognisers	48	44	53	48	47	→ 38	-
		Non-recognisers	16	15	18	18	19	18	-

*Targets are defined as per the TfL Marketing & Communications RideLondon TDM brief Target met / Close to target / Target not met
 Base: total (residents of affected boroughs) (Jul-15 (499), Aug-15 (501)); Recognisers, Jul-15 (222), Aug-15 (288); Non-recognisers, Jul-15 (277), Aug-15 (213)



- Significant difference between recognisers and non recognisers
- Significant increase wave on wave
- Significant decrease wave on wave

Overall summary of Key Performance Indicators

KPI		Jul-13 (%)	Aug-13 (%)	May-14 (%)	Aug-14 (%)	Jul-15 (%)	Aug-15 (%)	Target * 2015 (%)
Behaviours	Change my travel plans during the events	Total	25	38	50 → 37	47 → 34	37	
		Recognisers	32	45	61 → 49	59 → 42	-	
		Non-recognisers	17	23	42 → 19	37 → 23	-	
	Attend the event(s)	Total	7	16	21 → 15	21 → 15	-	
		Recognisers	12	22	37 → 21	35 → 22	-	
		Non-recognisers	2	6	9	5	10	6
	Avoid the affected areas on the relevant days if not attending an event	Total	43	59	69 → 56	66 → 56	56	
		Recognisers	47	70	80 → 70	77 → 68	-	
		Non-recognisers	40	38	61 → 34	57 → 41	-	
	Use alternative transport/routes if appropriate	Total	29	38	60 → 36	58 → 32	-	
		Recognisers	33	46	65 → 45	69 → 41	-	
		Non-recognisers	25	24	55 → 21	49 → 21	-	
	Remind my friends about the events so they can make plans to avoid disruption	Total	21	44	57 → 45	54 → 42	-	
		Recognisers	27	55	74 → 60	70 → 57	-	
		Non-recognisers	14	24	44 → 23	40 → 23	-	

Please note: the response codes for this question changed with each wave. Data in the KPI table refers to: May-13 – regularly/always intend to do this; Jul-13 – yes, definitely intend to do this; Aug-13 – yes, I did this; As such, wave on wave changes have not been tested for significance.

*Targets are defined as per the TfL Marketing & Communications RideLondon TDM brief Target met / Close to target / Target not met
Base: total (residents of affected boroughs) (Jul-15 (499), Aug-15 (501)); Recognisers, Jul-15 (222), Aug-15 (288); Non-recognisers, Jul-15 (277), Aug-15 (213)



- Significant difference between recognisers and non recognisers
- Significant increase wave on wave
- Significant decrease wave on wave

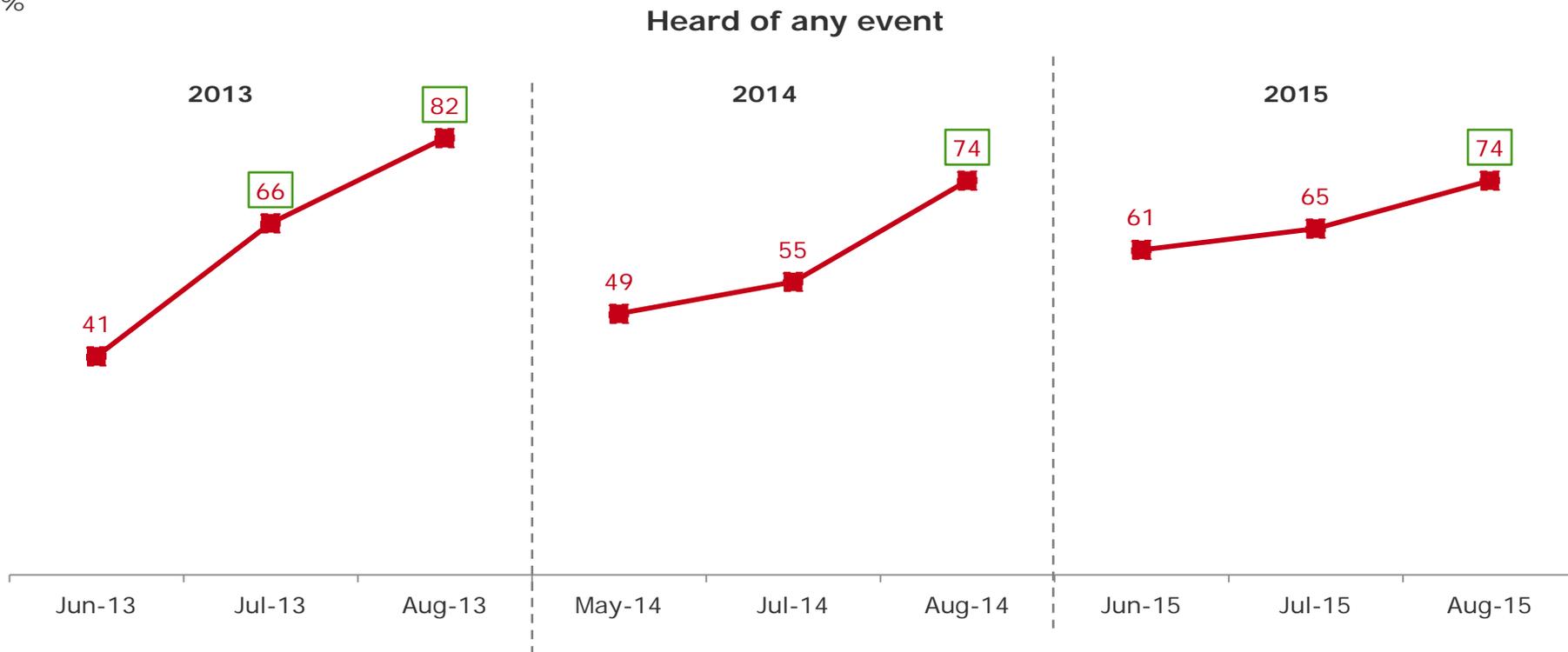
2

Awareness of events

Awareness of events (i)

As in previous years, awareness of the events grew with each wave, with 65 per cent of respondents having heard of at least one event before they took place, increasing to circa three quarters by August.

%

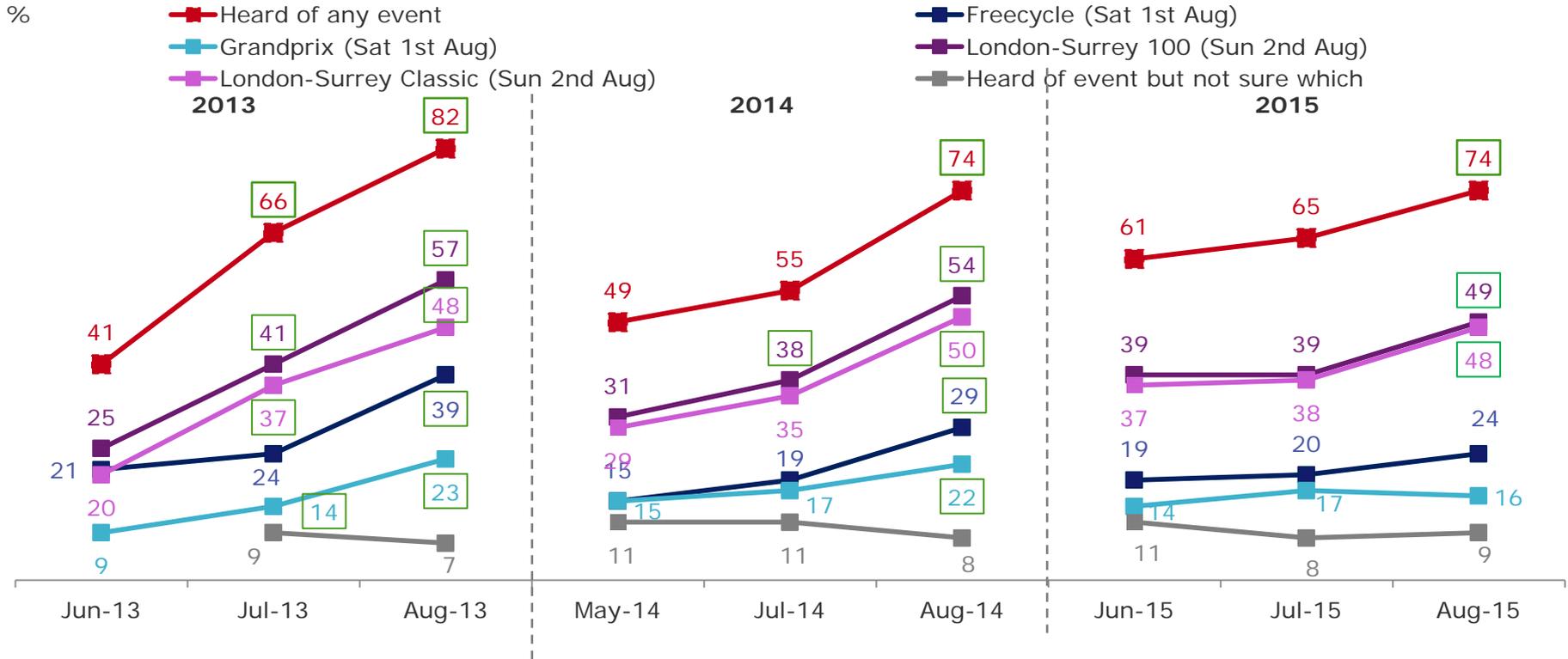


Q4. Before today, which of the following, if any, Prudential RideLondon events in 2015 have you heard of?
Base: total (residents of affected boroughs) (Jun-15 (500), Jul-15 (499), Aug-15 (501))

Significant increase wave on wave

Awareness of events (i)

Awareness of the events 'London-Surrey 100' and 'London-Surrey Classic' increased significantly between July and August. Post event awareness levels of the 'Free Cycle' and 'Grand Prix' events were however lower than levels seen in 2014.

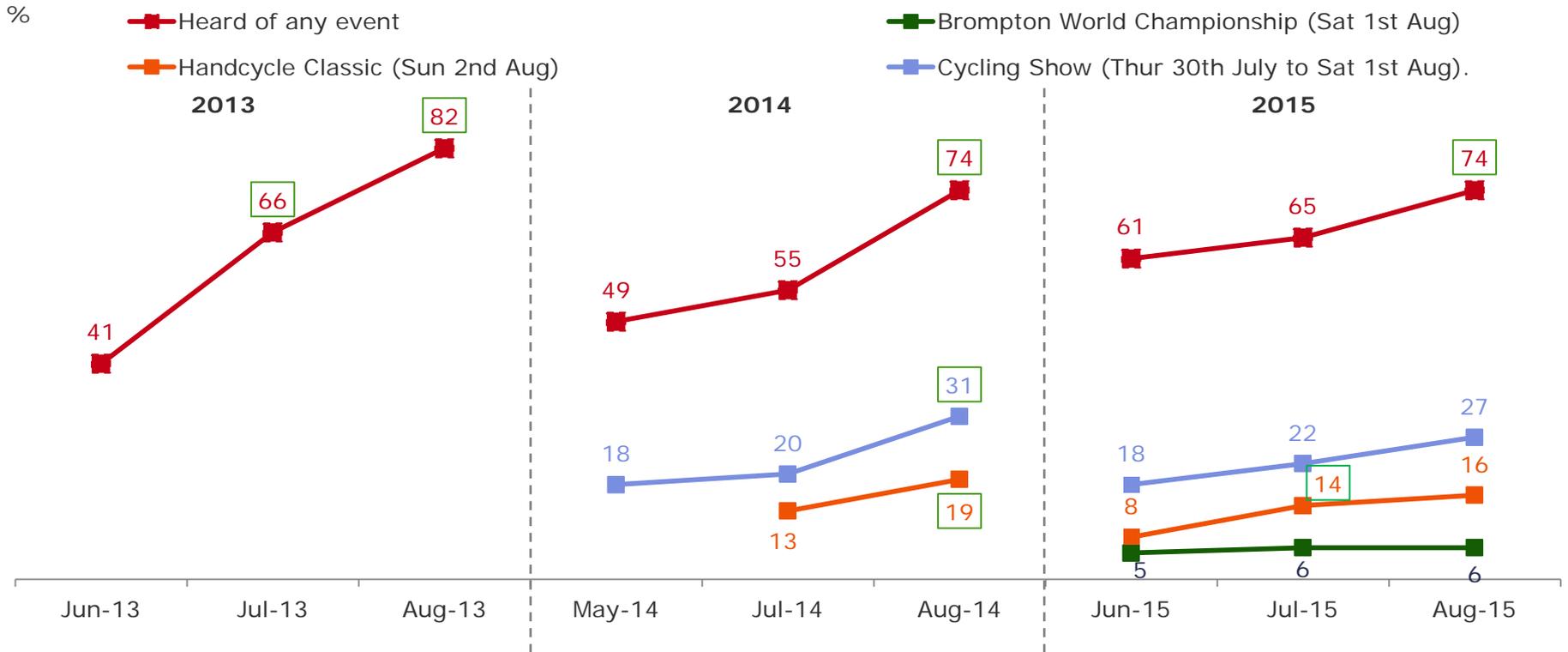


Q4. Before today, which of the following, if any, Prudential RideLondon events in 2015 have you heard of?
 Base: total (residents of affected boroughs) (Jun-15 (500), Jul-15 (499), Aug-15 (501))

 Significant increase wave on wave

Awareness of events (ii)

Awareness of the 'Handcycle Classic' event grew significantly between the Pre-Wave and the Mid-Wave and then stabilised at 16 after the events took place. Awareness of the 'Cycling show' grew significantly from 18 per cent in June to 27 per cent in August. Awareness of the 'Brompton World Championship' remained low and stable over time.



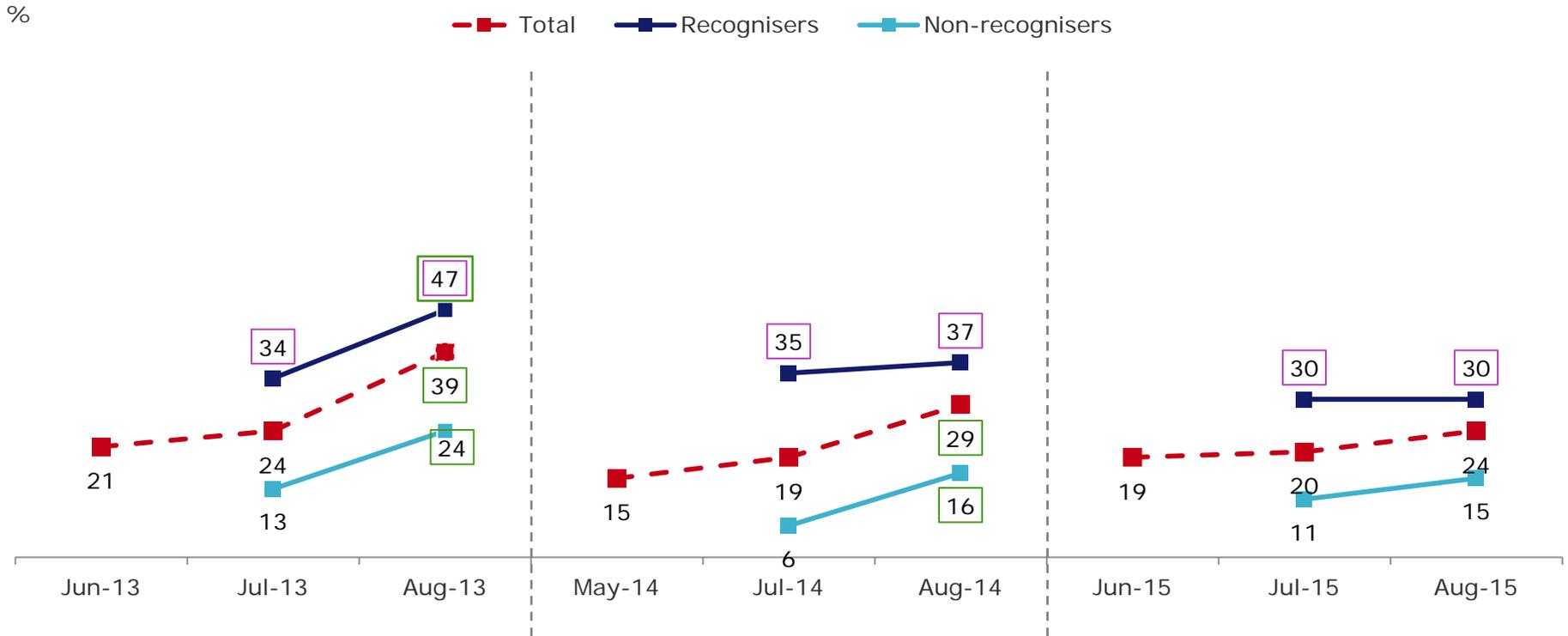
Q4. Before today, which of the following, if any, Prudential RideLondon events in 2015 have you heard of?
 Base: total (residents of affected boroughs) (Jun-15 (500), Jul-15 (499), Aug-15 (501))

 Significant increase wave on wave

Awareness of events

Before the events took place, one in five of the residents in the affected boroughs were aware of the FreeCycle event. Awareness increased to 24 per cent after the event. Recognisers were much more likely to have heard of the event.

FreeCycle (Saturday 3 Aug 2013/Saturday 9 Aug 2014/Saturday 1 August 2015)



Q4. Before today, which of the following, if any, Prudential RideLondon events in 2015 have you heard of?
 Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

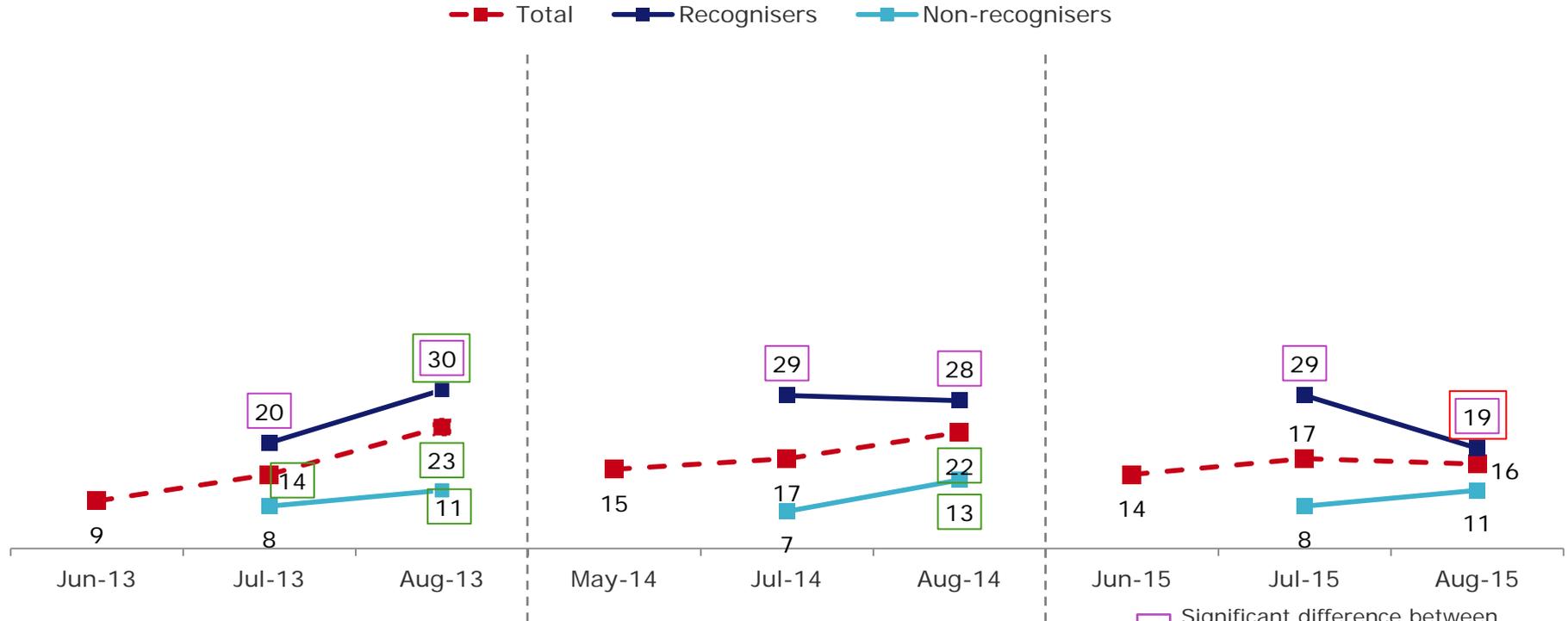
□ Significant difference between recognisers and non-recognisers
 □ Significant increase wave on wave

Awareness of events

Awareness of the Grand Prix was at 17 per cent before the event took place, and this remained fairly stable after the event due to a significant decrease in awareness among recognisers after the event.

Grand Prix (Saturday 3 August 2013/Saturday 9 August 2014/Saturday 1 August)

%



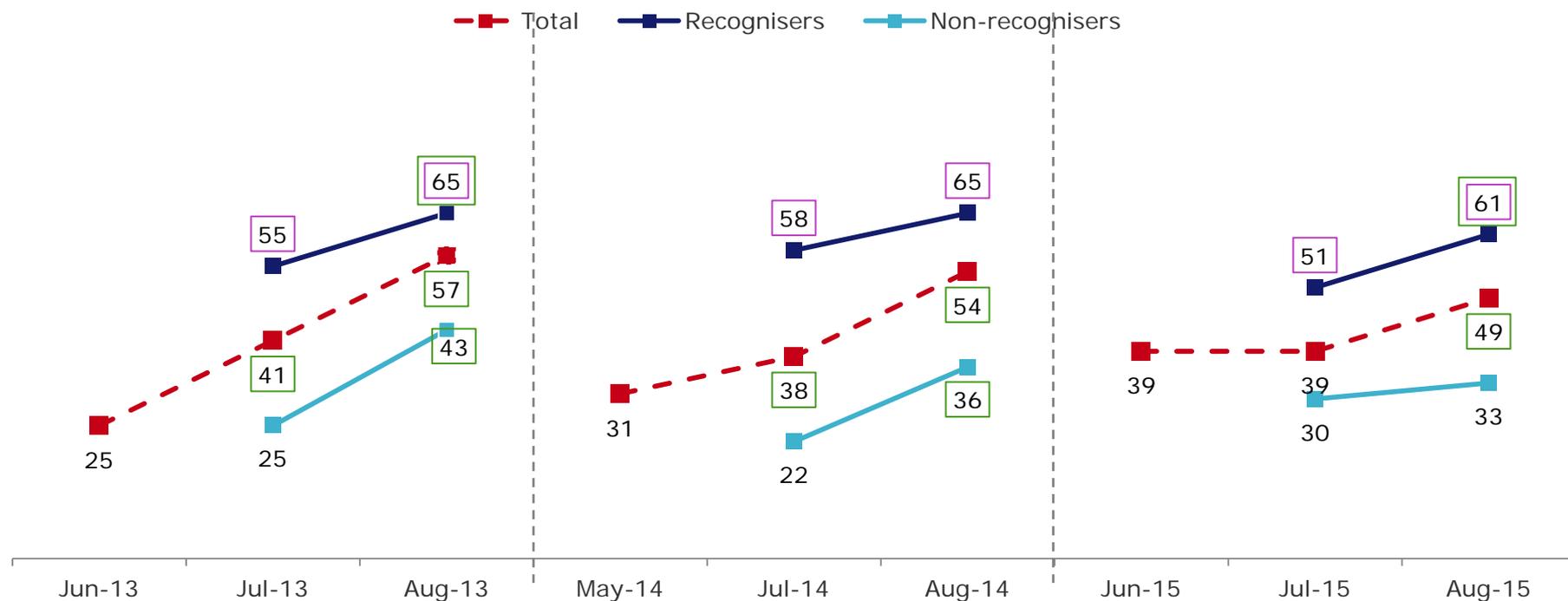
Q4. Before today, which of the following, if any, Prudential RideLondon events in 2015 have you heard of?
 Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

- Significant difference between recognisers and non-recognisers
- Significant increase wave on wave
- Significant decrease wave on wave

Awareness of events

Nearly 2 in 5 of residents in the affected boroughs were aware of the London Surrey 100 event before it took place, increasing to just under half in August, with ad recognisers significantly more likely to be aware of the event. Awareness levels after the events are slightly lower than levels seen last year though.

% London-Surrey 100 (Sunday 4 August 2013/ Sunday 10 August 2014/Sunday 2 August 2015)



Q4. Before today, which of the following, if any, Prudential RideLondon events in 2015 have you heard of?

Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

 Significant difference between recognisers and non-recognisers
 Significant increase wave on wave

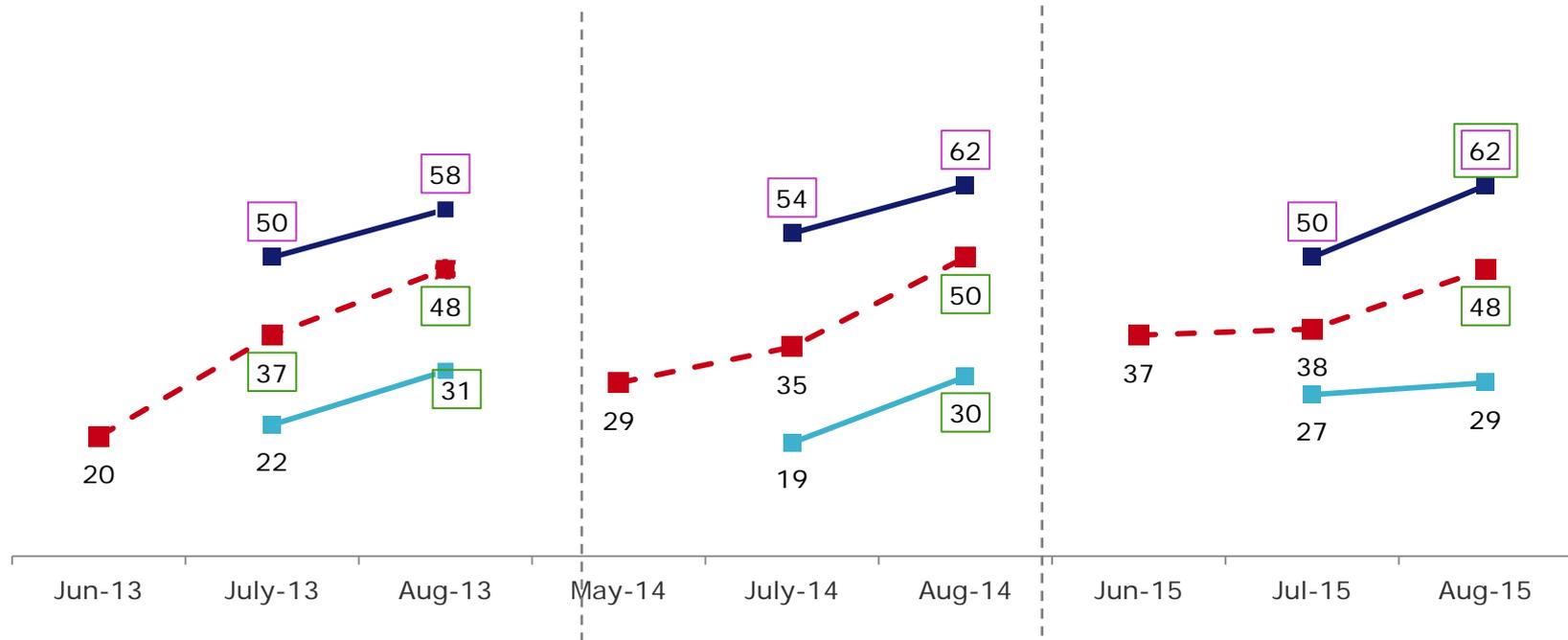
Awareness of events

Awareness of the London-Surrey Classic was just under 2 in 5 prior to the event taking place, and this increased significantly in August to 1 in 2, with ad recognisers more aware of the event than non-recognisers. Awareness levels after the event were in line with levels following the event last year.

London-Surrey Classic (Sunday 4 August/Sunday 10 August/Sunday 2 August)

%

—■ Total —■ Recognisers —■ Non-recognisers



Q4. Before today, which of the following, if any, Prudential RideLondon events in 2015 have you heard of?

Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

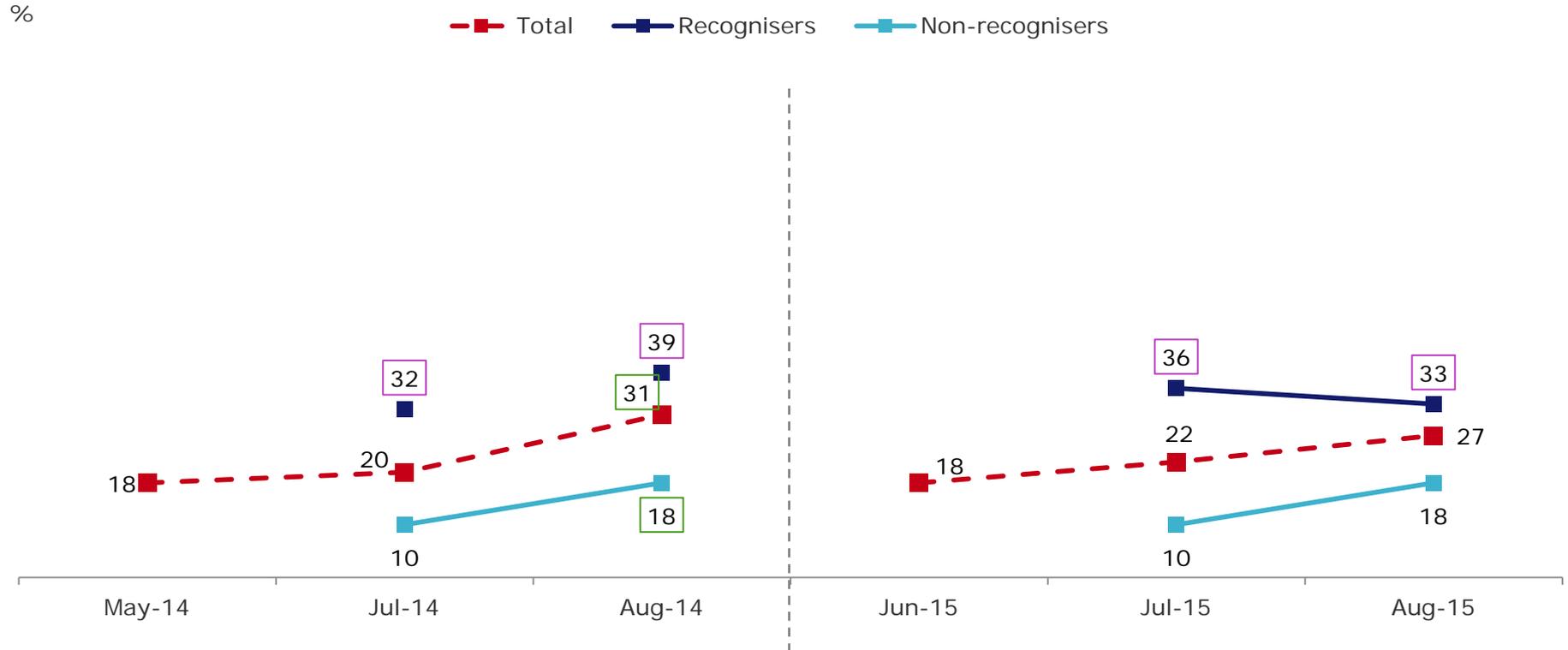
□ Significant difference between recognisers and non-recognisers

□ Significant increase wave on wave

Awareness of events

Before the events took place, more than one in five of the residents in the affected boroughs were aware of the 2015 Cycling Show. Awareness increased slightly to 27 per cent after the event.

The 2015 Cycling Show (30th July – 1st August)



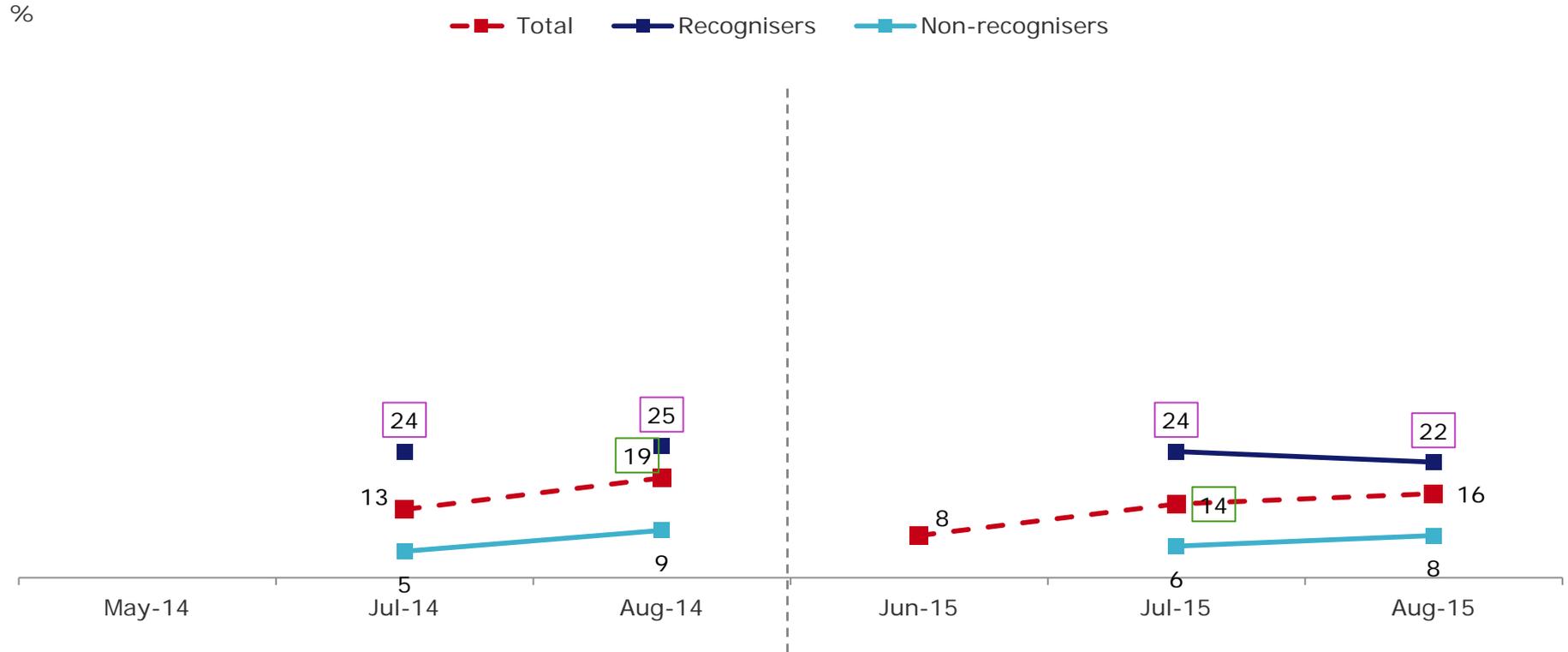
Q4. Before today, which of the following, if any, Prudential RideLondon events in 2015 have you heard of?
 Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

□ Significant difference between recognisers and non-recognisers
 □ Significant increase wave on wave

Awareness of events

Awareness levels of the Ride London Handcycle classic is slightly lower than most of the other RideLondon events with awareness of 14 per cent before the events took place. Awareness however increased slightly to 16 per cent after the events.

The Ride London Handcycle Classic (Sunday 10 August/ Sunday 2 August)



Q4. Before today, which of the following, if any, Prudential RideLondon events in 2015 have you heard of?
 Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

□ Significant difference between recognisers and non-recognisers
 □ Significant increase wave on wave

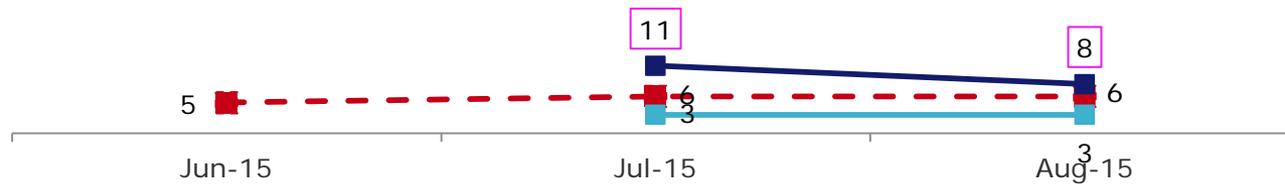
Awareness of events

Awareness levels of the Brompton World Championship is the lowest of all events with awareness of 6 per cent before the events took place. Awareness remained at the same level after the event. Awareness was however higher among recognisers.

The Brompton World Championship (Saturday 1 August)

%

—■— Total —■— Recognisers —■— Non-recognisers



Q4. Before today, which of the following, if any, Prudential RideLondon events in 2015 have you heard of?
 Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

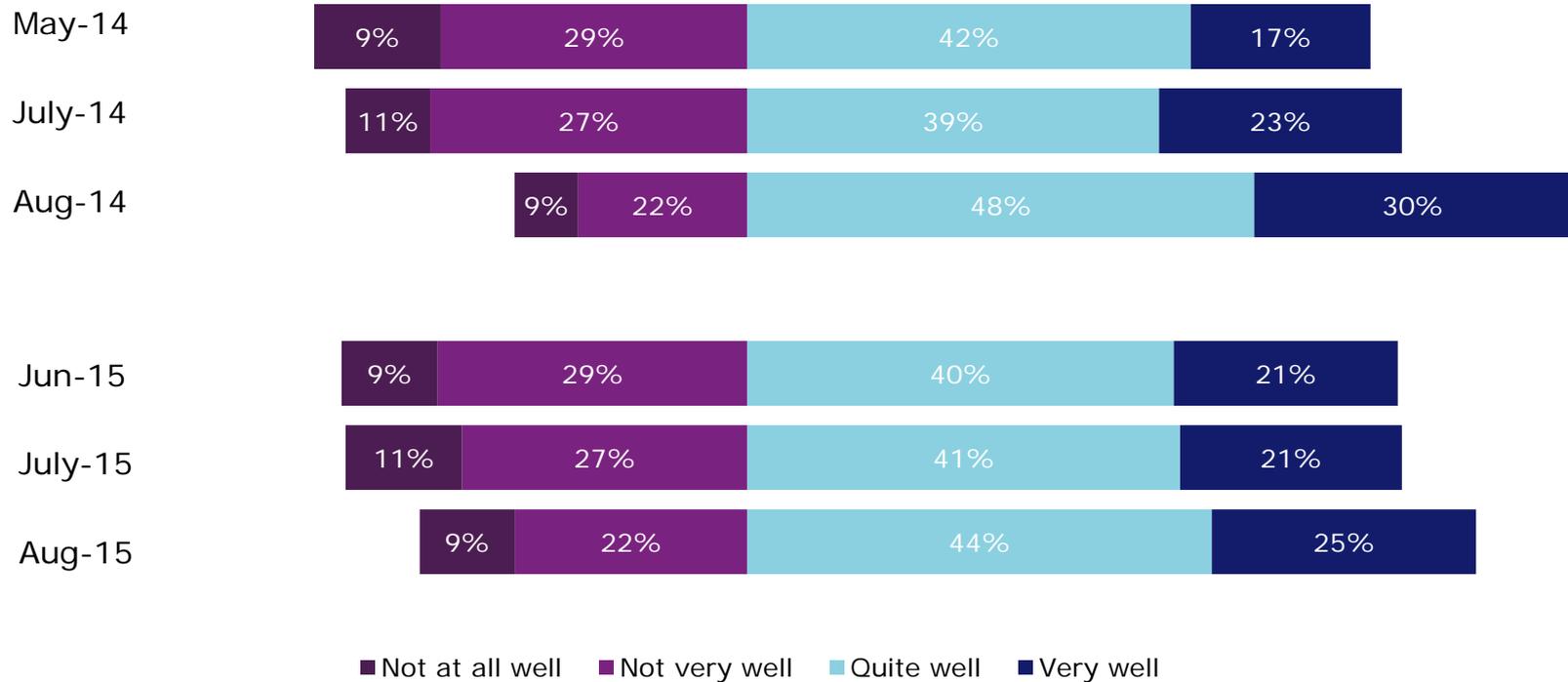
□ Significant difference between recognisers and non-recognisers
 □ Significant increase wave on wave

3

Impact of events

Understanding the impact of events in local area

Following the advertising campaign, stated understanding of the impact of events grew significantly among affected residents – from 62 per cent to 69 per cent understanding 'quite' or 'very' well. Levels of understanding after the events are lower than levels seen last year though (78 per cent).

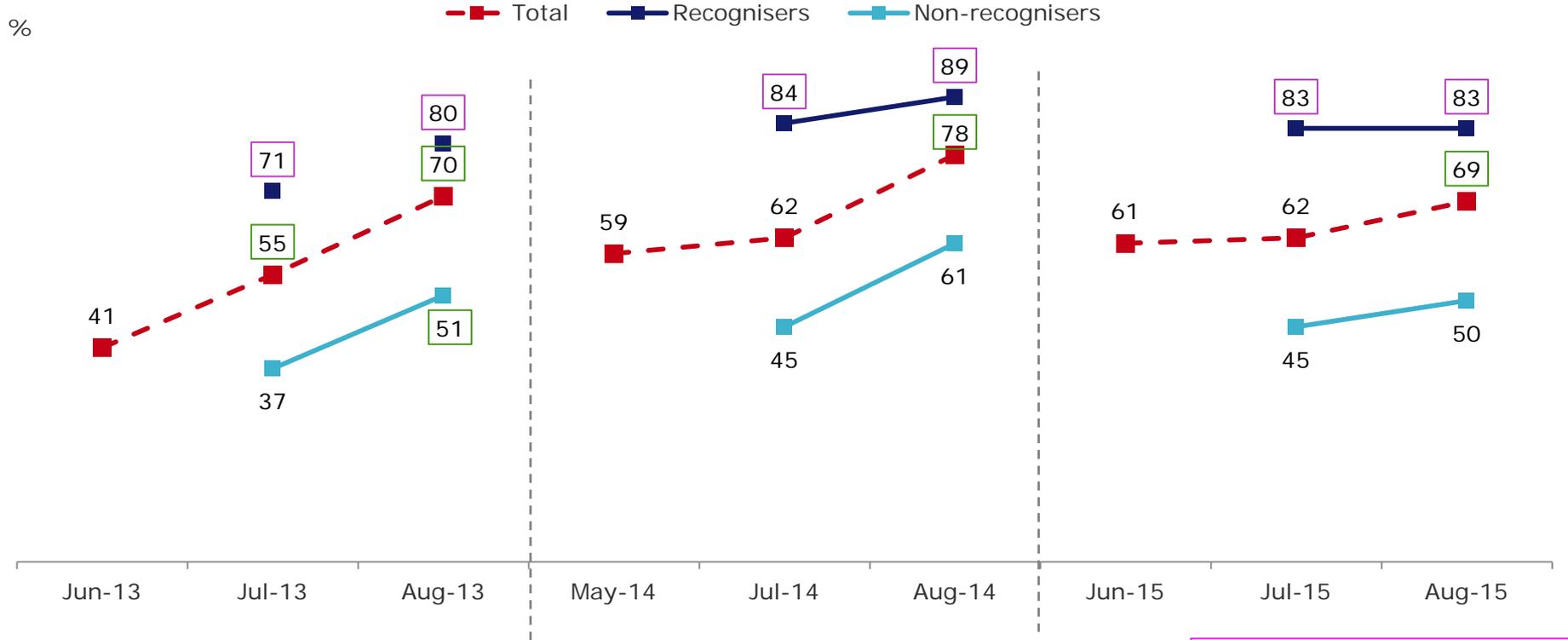


Q5. To what extent do/did you feel you understand/understood the impact these events might have on your local area?
Base: total (Jun-15 (500), Jul-15 (499), Aug-15 (501))

Understanding the impact of events

Stated understanding of the impact of events was greater among recognisers of the campaign. After the events took place, almost 7 in 10 residents of the affected boroughs said they understood what the impact would be 'quite well' or 'very well', significantly lower when compared with last year (8 in 10 residents).

Net: Understand quite/very well



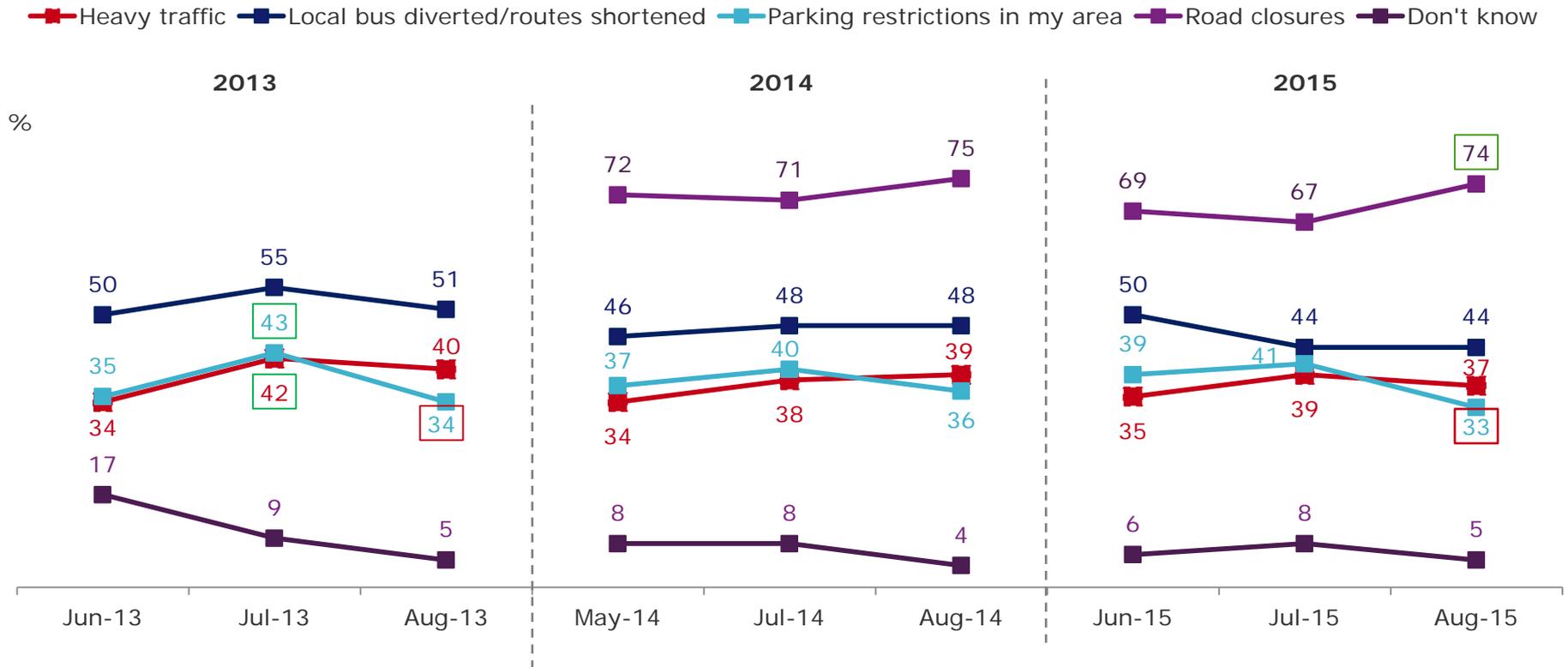
Q5. To what extent do/did you feel you understand /understood the impact these events might have on your local area?
 Base: total (residents of affected boroughs) (Jun-15 (500), Jul-15 (499), Aug-15 (501))
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Significant increase wave on wave

Impact on local area – events expected to/did happen

The campaign helped to inform residents of disruption to local roads – with three quarters of those affected expecting road closures to happen. Overall, levels seen pre, during and post-event were very similar to those seen in 2014.

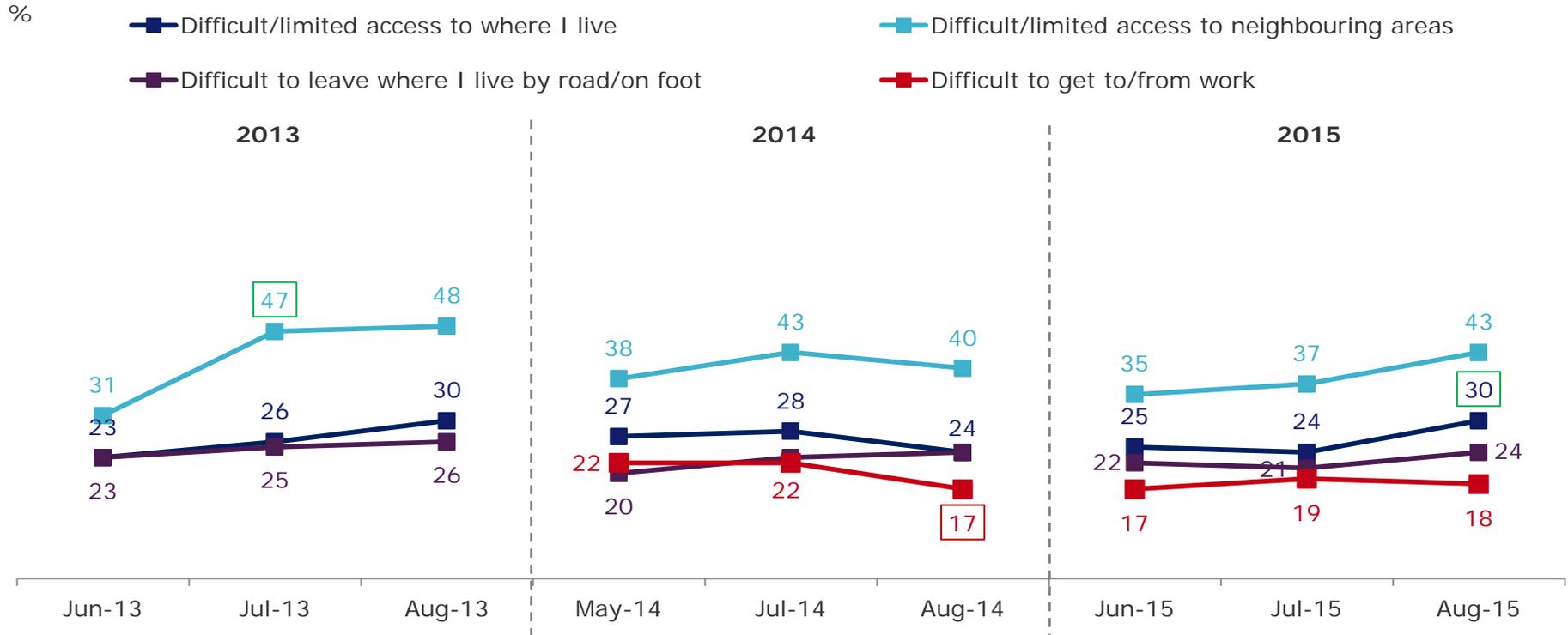


Q6. Which of the following do/did you expect to happen as a result of these events in your local area?
 Base: total (residents of affected boroughs) (Jun-15 (500), Jul-15 (499), Aug-15 (501))

 / Significant increase/decrease wave on wave

Impact on local area – events expected to/did happen

The proportion expecting there to be difficult/limited access to their home and neighbouring areas increased following the events.



Q6. Which of the following do/did you expect to happen as a result of these events in your local area?
 Base: total (residents of affected boroughs) (Jun-15 (500), Jul-15 (499), Aug-15 (501))

Please note: the response code changed in 2015 from Difficult to leave where I live 'by road' to 'by road or on foot'

□ Significant increase wave on wave
 □ Significant decrease wave on wave

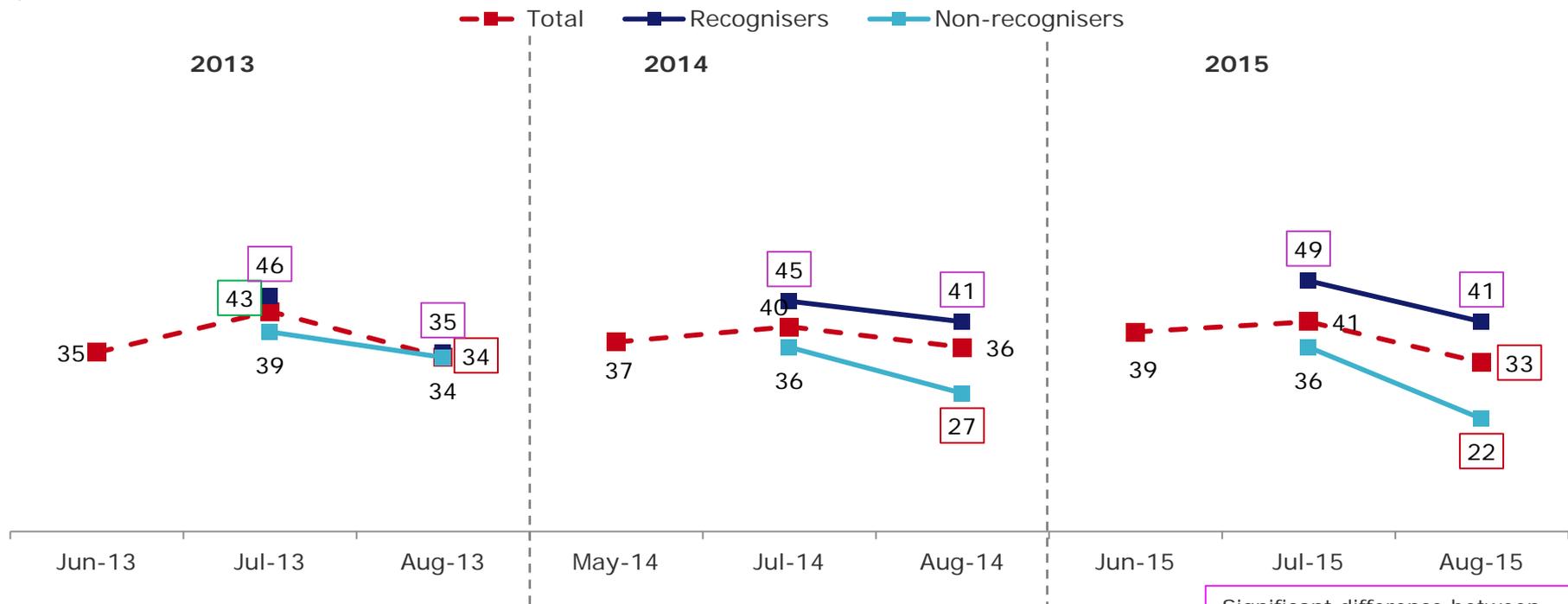
Impact on local area

The proportion who claim to have expected parking restrictions fell following the events – suggesting some residents who had expected to experience restrictions were not actually affected.

Which of these do you expect to happen?

Parking restrictions in my area

%



Significant difference between recognisers and non-recognisers

Q6. Which of the following do/did you expect to happen as a result of these events in your local area?

Base: total (residents of affected boroughs) (Jul-15 (499), Aug-15 (501))

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant increase/decrease wave on wave

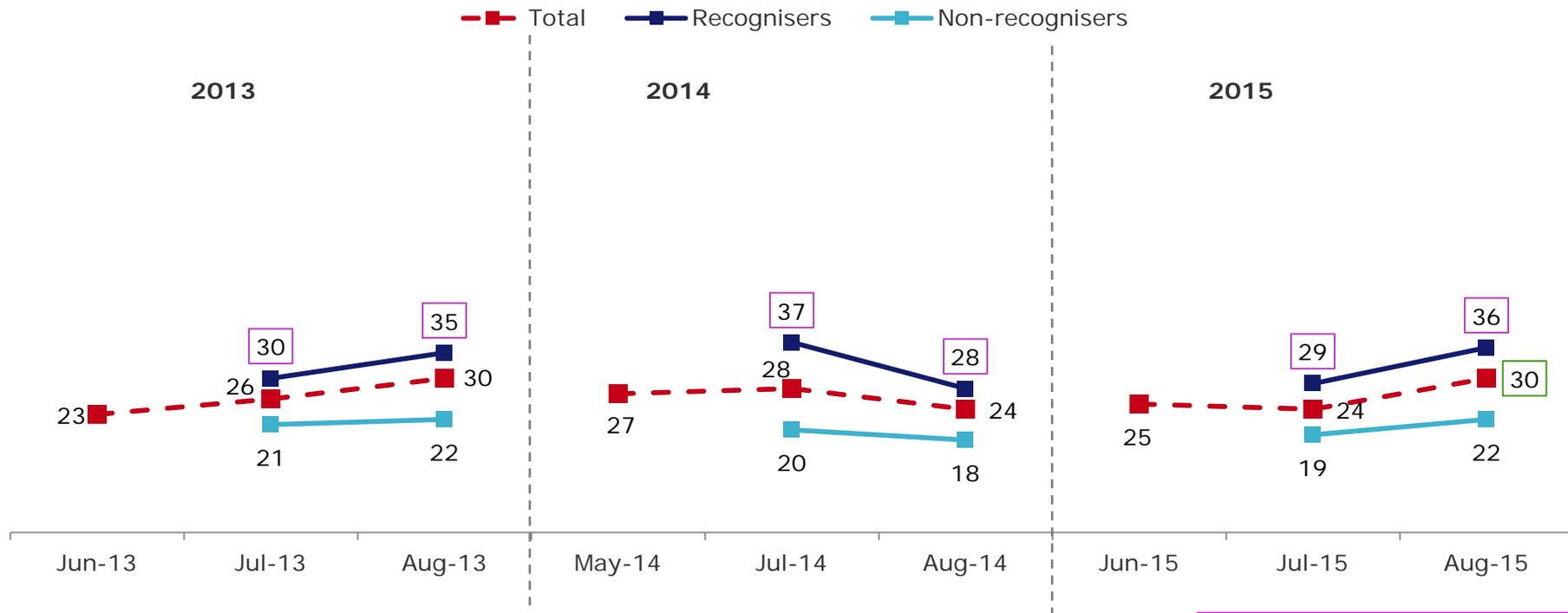
Impact on local area

Nearly one in four residents acknowledged that access to their neighbourhood would be difficult, increasing slightly to 3 in 10. Awareness was significantly higher among recognisers of the campaign.

Which of these do you expect to happen?

Difficult/limited access to where I live

%



Q6. Which of the following do/did you expect to happen as a result of these events in your local area?

Base: total (residents of affected boroughs) (Jul-15 (499), Aug-15 (501))

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Significant increase/decrease wave on wave

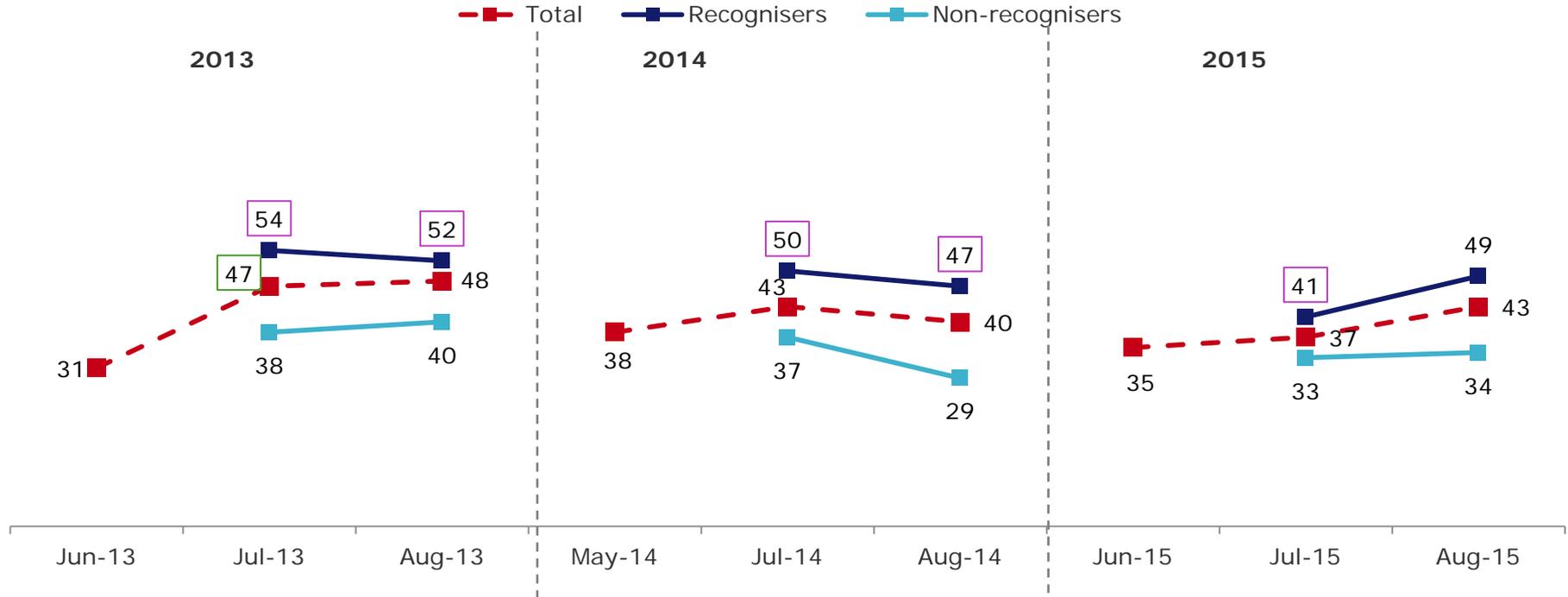
Impact on local area

Just under 40 per cent of residents expected access to neighbouring areas to be difficult – a figure which increased slightly following the events and is higher among recognisers.

Which of these do you expect to happen?

Difficult/limited access to neighbouring areas

%



Q6. Which of the following do/did you expect to happen as a result of these events in your local area?
 Base: total (residents of affected boroughs) (Jul-15 (499), Aug-15 (501))
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Significant increase wave on wave

Impact on local area

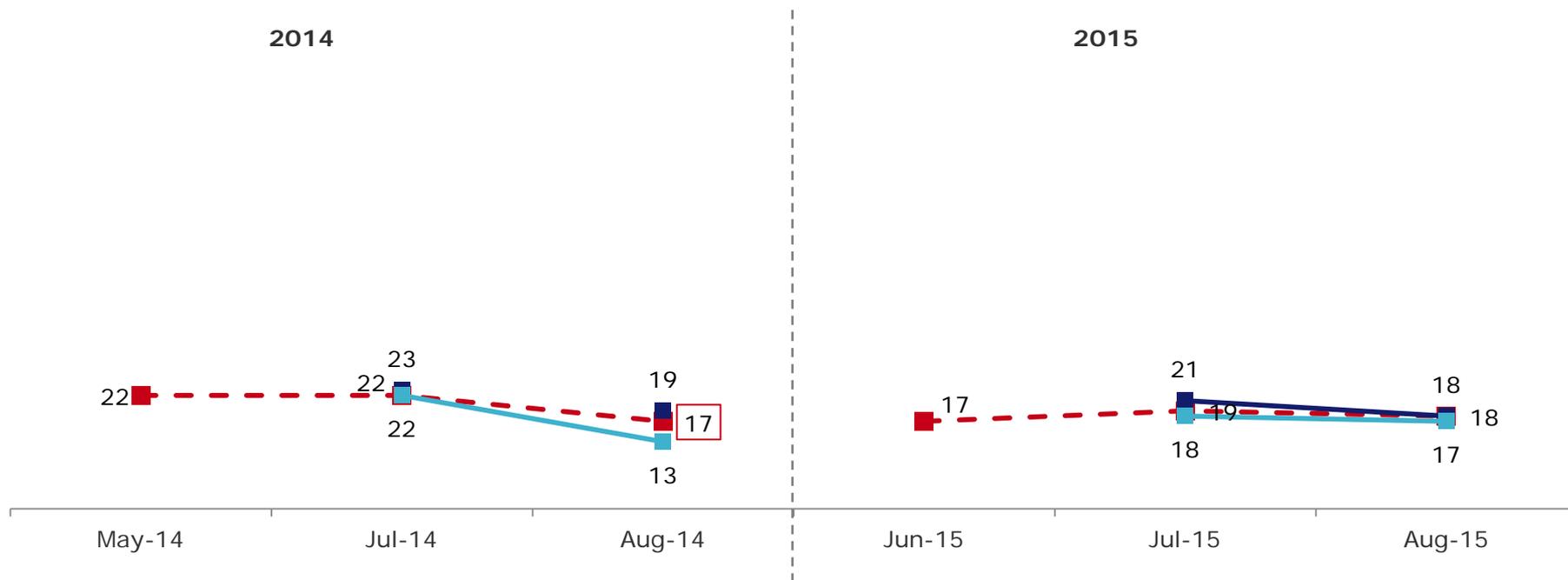
Nearly one in five residents expected to have difficulty getting to/from work as a result of the events – comparable to last year. Their experience was in line with their expectation.

Which of these do you expect to happen?

Difficult to get to or from work

%

—■ Total —■ Recognisers —■ Non-recognisers



Q6. Which of the following do/did you expect to happen as a result of these events in your local area?

Base: total (residents of affected boroughs) (Jul-15 (499), Aug-15 (501))

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

□ Significant decrease wave on wave

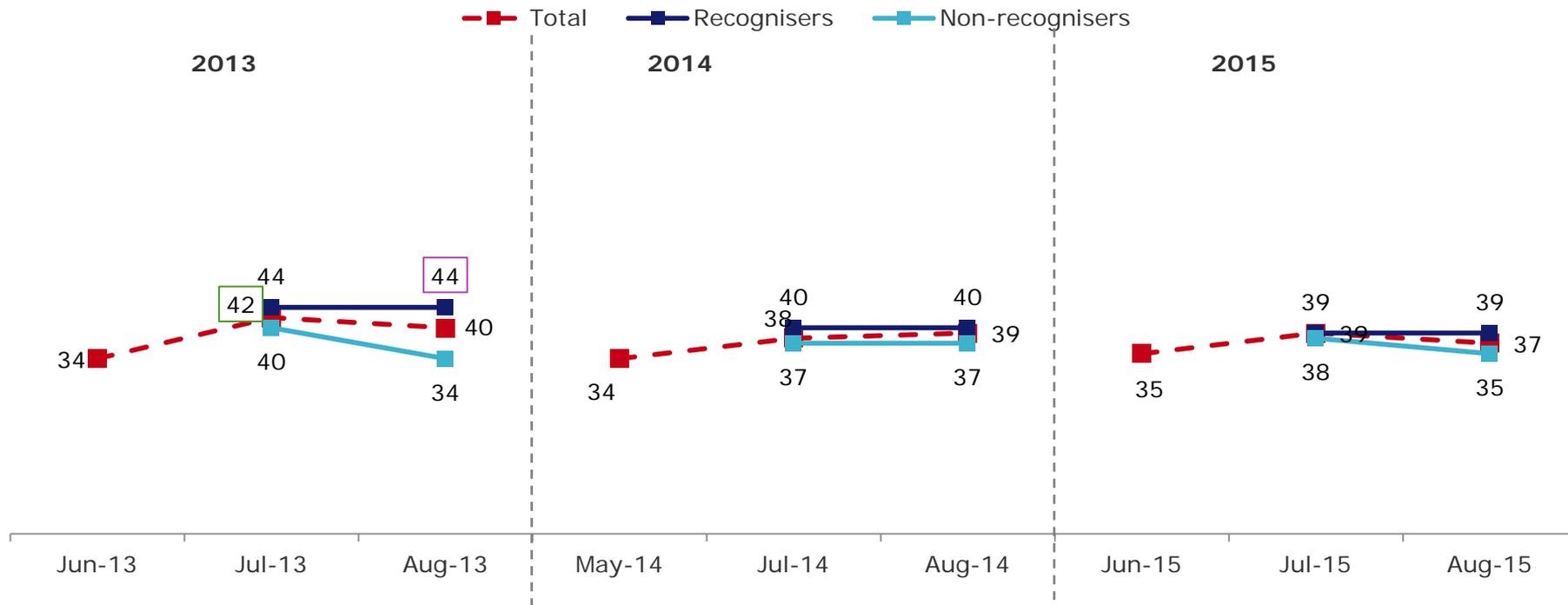
Impact on local area

Expectations of heavy traffic matched experience – at similar levels to last year.

Which of these do you expect to happen?

Heavy traffic

%



Q6. Which of the following do/did you expect to happen as a result of these events in your local area?

Base: total (residents of affected boroughs) (Jul-15 (499), Aug-15 (501))

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Significant increase wave on wave

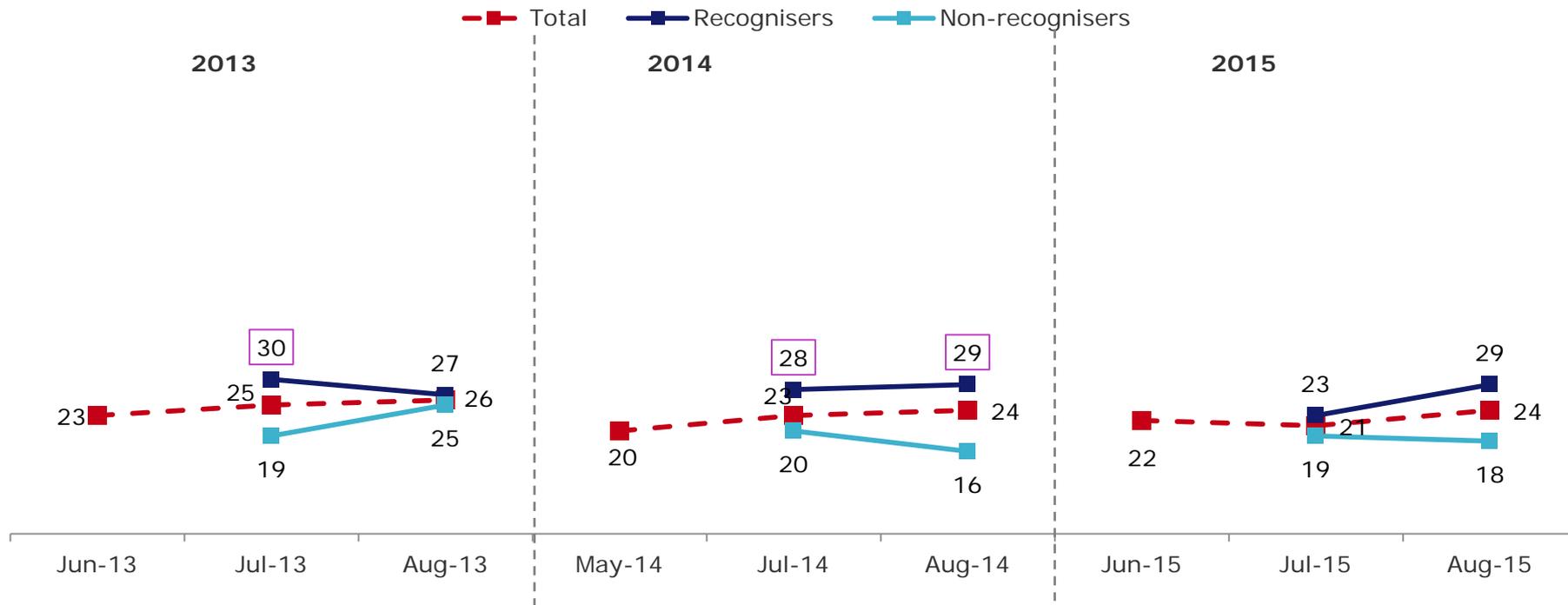
Impact on local area

Around a quarter of residents expected it to be difficult to leave where they live by road or on foot - in line with last year's results.

Which of these do you expect to happen?

Difficult to leave where I live by road or on foot*

%



Significant difference between recognisers and non-recognisers

Q6. Which of the following do/did you expect to happen as a result of these events in your local area?
 Base: total (residents of affected boroughs) (Jul-15 (499), Aug-15 (501))
 Please note: the response code changed in 2015 from Difficult to leave where I live by road to 'by road or on foot'
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

*Please note: Response code changed from 'difficult to leave where I live by road' to 'by road or on foot' in 2015

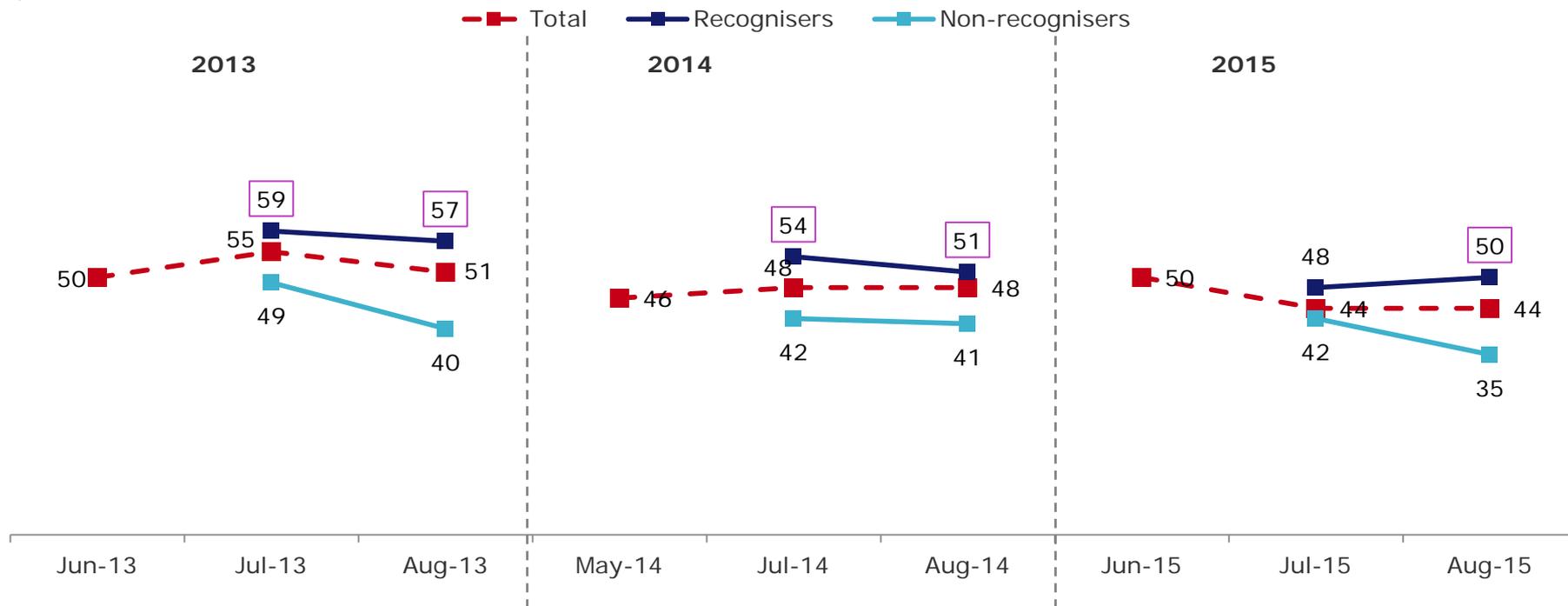
Impact on local area

Just under half of residents in the affected areas expected buses to be diverted or routes shortened and this was significantly higher among recognisers following the event.

Which of these do you expect to happen?

Local buses may be diverted or routes shortened

%



Q6. Which of the following do/did you expect to happen as a result of these events in your local area?

Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Impact on local area

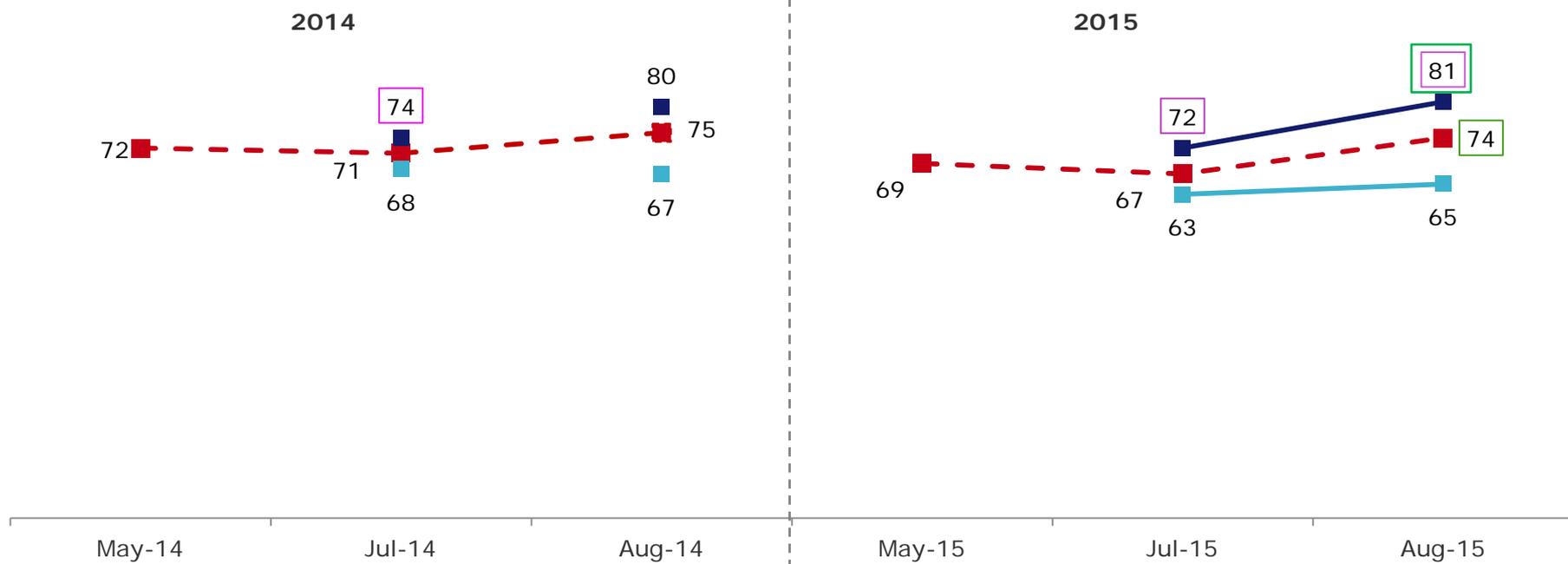
Exposure to the campaign significantly increased the expectation of road closures, though the majority of affected residents expected some disruption.

Which of these do you expect to happen?

Road closures

%

—■ Total —■ Recognisers —■ Non-recognisers



Q6. Which of the following do/did you expect to happen as a result of these events in your local area?

Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Significant increase wave on wave

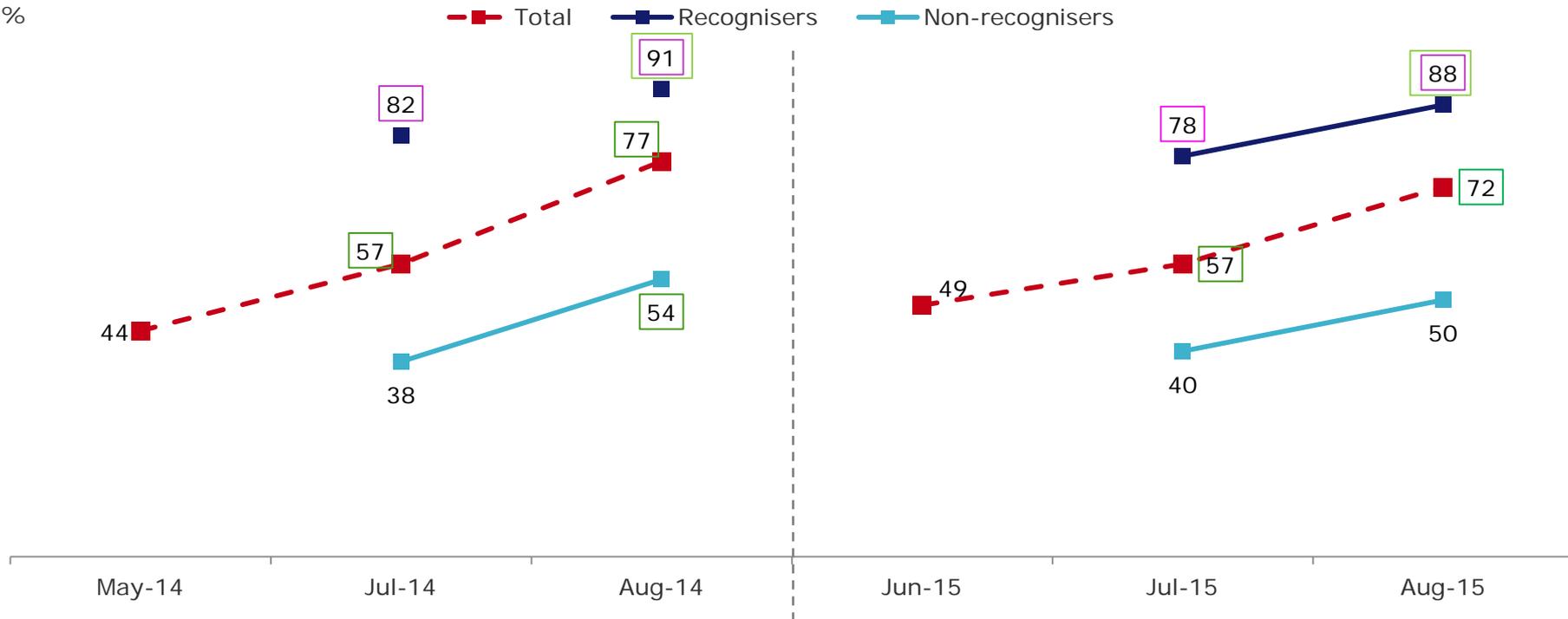
Aware of extensive road closures

There were significant increases over time in the proportion of those who said they expected road closures during the event. Campaign recognisers were significantly more aware of closures than non recognisers.

Aware of extensive road closures?

Yes

%



Q25. Are you aware, as part of Prudential Ride London that there will be extensive road closures on Saturday 1st and Sunday 2nd August 2015
 Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers
 Significant increase wave on wave

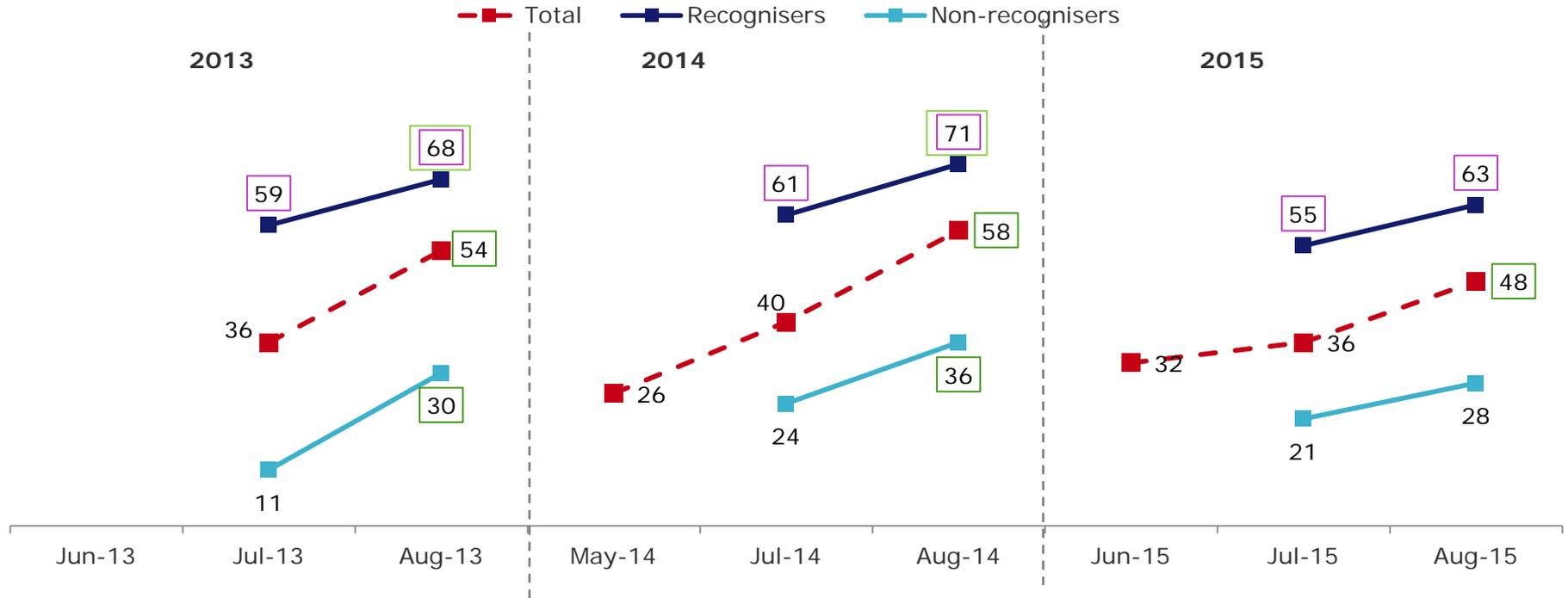
Aware of bridge closures

There were also significant increases in the proportion of residents who were aware there would be bridge closures during the event. Awareness levels were lower than last year's results.

Aware of extensive bridge closures?

Yes

%



Q25. Are you aware, as part of Prudential Ride London that there will be extensive bridge closures on Saturday 1st and Sunday 2nd August 2015
 Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Significant increase wave on wave

Aware of changes to routes

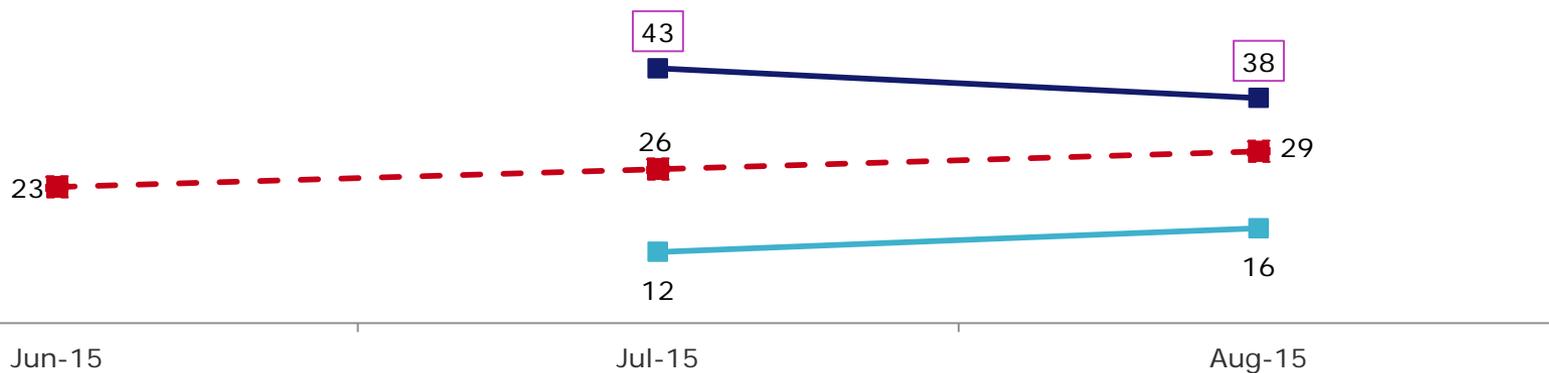
Nearly 1 in 3 affected residents claimed to be aware of changes to the Surrey 100, Surrey Classic and Freecycle routes this year. Campaign recognisers were significantly more aware of the changes to the routes than non recognisers.

Aware of changes to Surrey 100, Surrey Classic and Freecycle routes?

Yes

%

—■ Total —■ Recognisers —■ Non-recognisers



Q25. Are you aware, as part of Prudential Ride London that there will be Surrey 100, Surrey Classic and Freecycle routes on Saturday 1st and Sunday 2nd August 2015

Base: total (residents of affected boroughs) (501 per wave)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

□ Significant difference between recognisers and non-recognisers

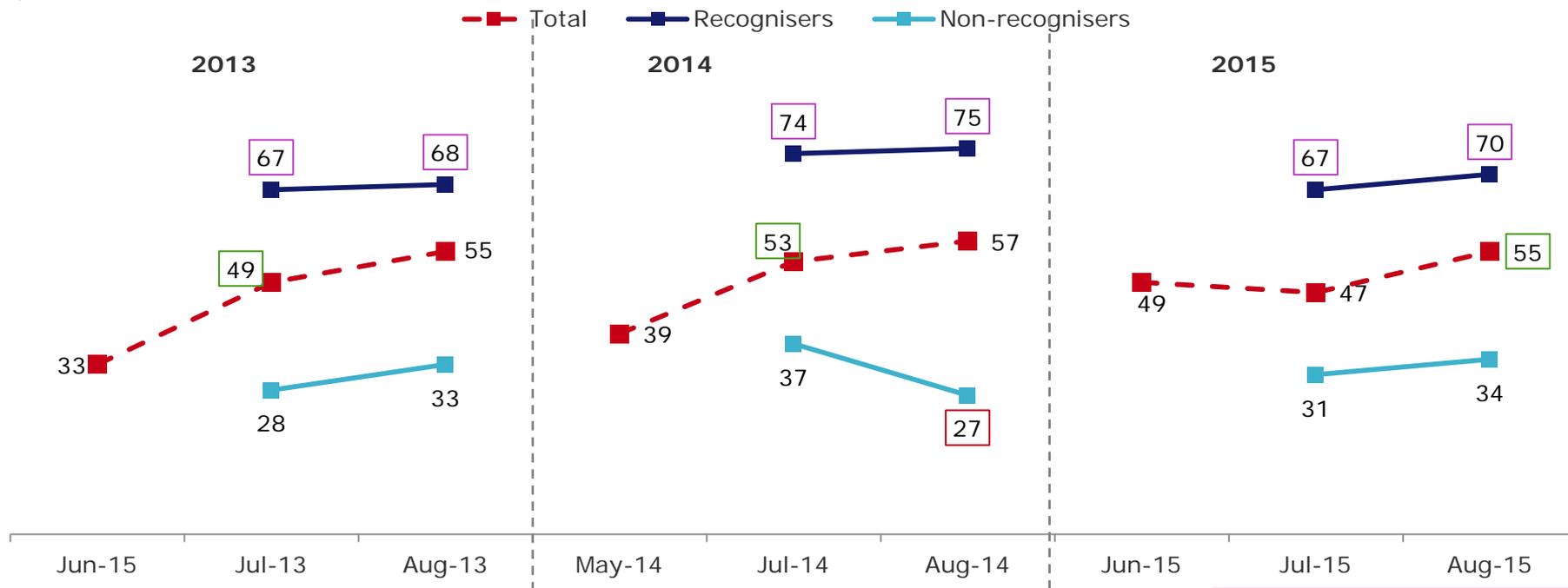
Where to look for more information

Positively, following the event more than half of residents said they knew where to go to find out more information about the events and this was significantly higher among campaign recognisers.

Know where to go to find out more information about the events

Yes

%



Q7. Before the event took place do/did you feel you know/knew where to go to find out more information about the 2015 Prudential RideLondon events to plan ahead of the events?

Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

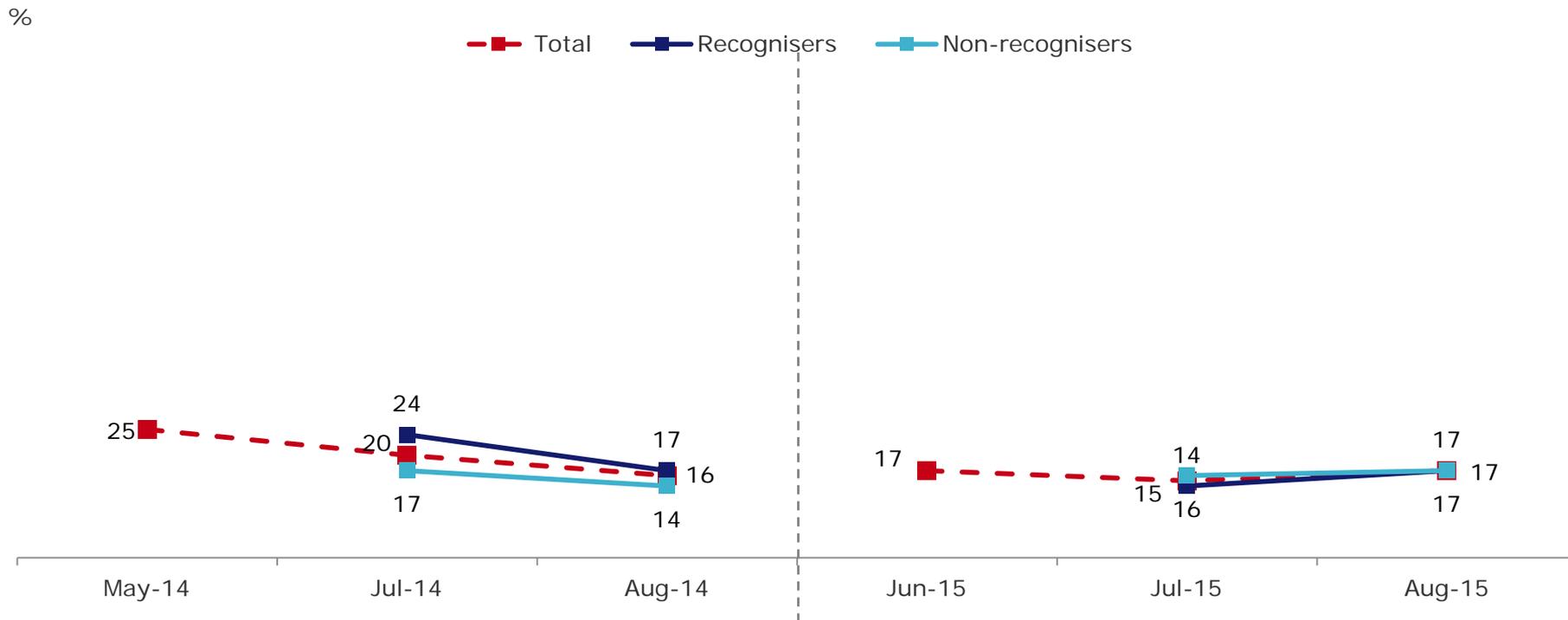
Significant difference between recognisers and non-recognisers

Significant increase/decrease wave on wave

Information needed

Following the event, reassuringly only 17 per cent of residents said they needed to know a lot more about the disruptions and this was in line with last year's results.

Need to know a lot more about about the disruptions



Q7a. To what extent do/did you need to know more about the disruptions as a result of the Prudential RideLondon events in 2014 to help you to prepare?

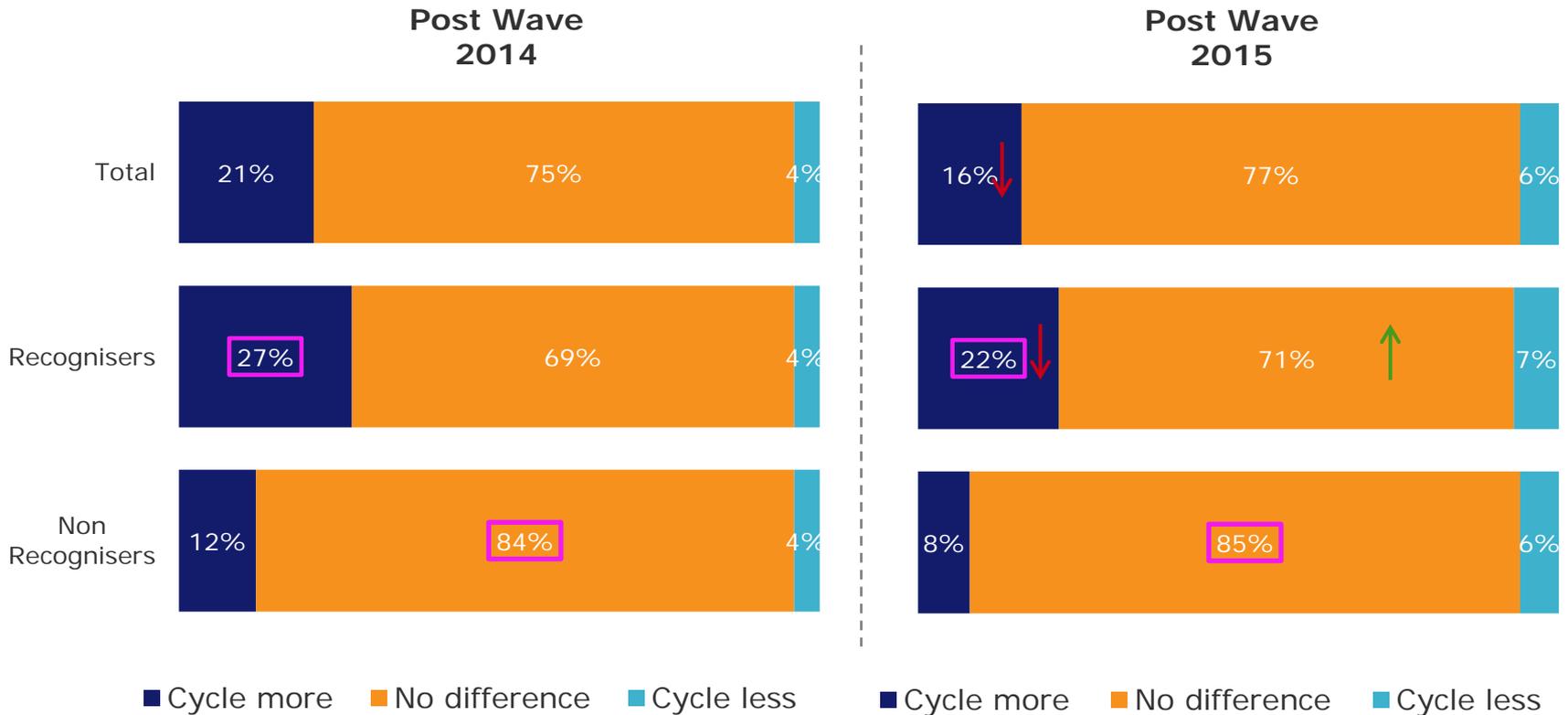
Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Impact on cycling (post wave only)

Following the RideLondon events, 16 per cent felt encouraged to cycle more – this was significantly lower than last year's 21 per cent.



Q26b. Do you think that the 2015 Prudential RideLondon events encouraged you to cycle any more or less than you did before?
 Base: total (501 per wave)
 Recognisers (288), Non-recognisers (213)

→ Significant increase/ decrease wave
 → on wave

Significant difference between recognisers and non-recognisers

Perception of London as a destination for major events (Post wave only)

Following the events, just over a fifth had a better perception of London as a destination for major events – rising to 28 per cent among recognisers. Strength of perception was however weaker compared to last year, with a greater proportion of neutral responses this year.



Q26c. Has your perception of London as a destination for major events changed as a result of attending the 2015 Prudential RideLondon events?

Base: total (501 per wave)

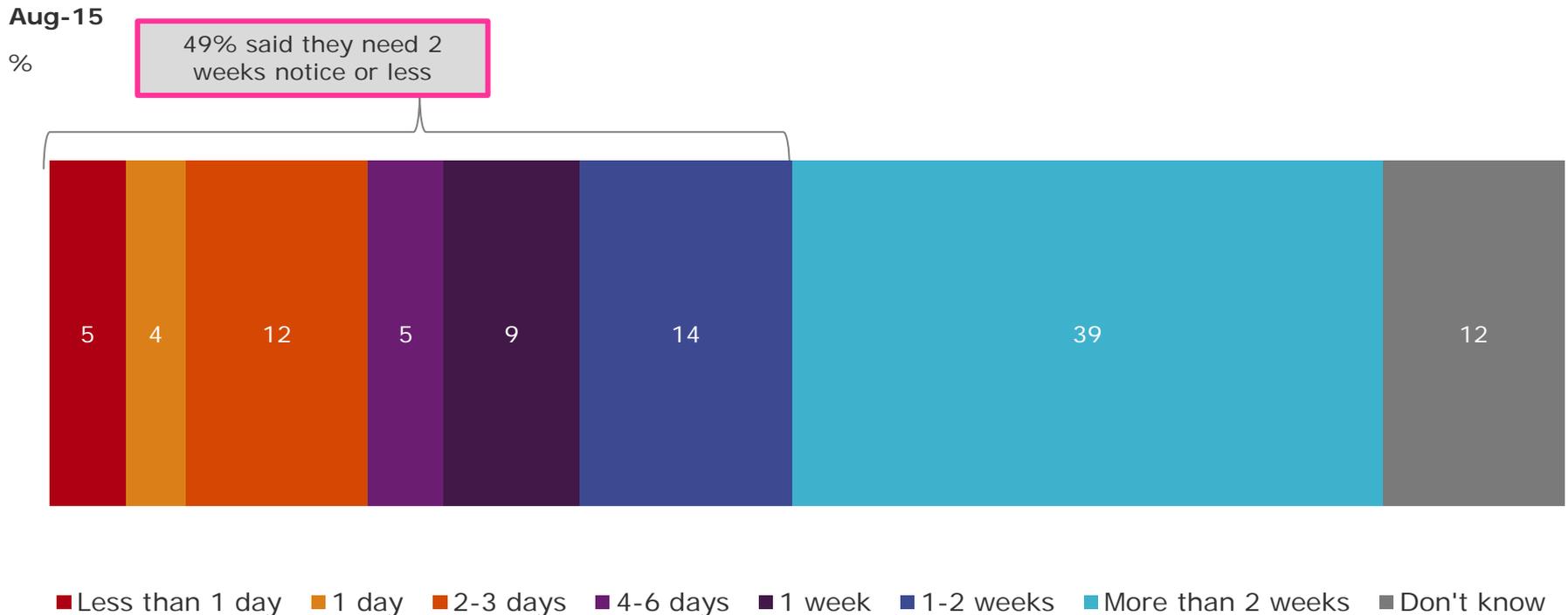
Recognisers (288), Non-recognisers (213)

→ Significant increase/ decrease wave
→ on wave

Significant difference between recognisers and non-recognisers

Advance notice required

As seen last year, there is almost 50/50 split between those who said they need more than 2 weeks' notice or don't know how much they need, and those who said that less than 2 weeks' notice is sufficient. 21 per cent said they only need 3 days or less notice in order to plan ahead.



Q26. How much advance notice do you feel you need to plan ahead for events like Prudential RideLondon?
Base: total (residents of affected boroughs) (501)

4

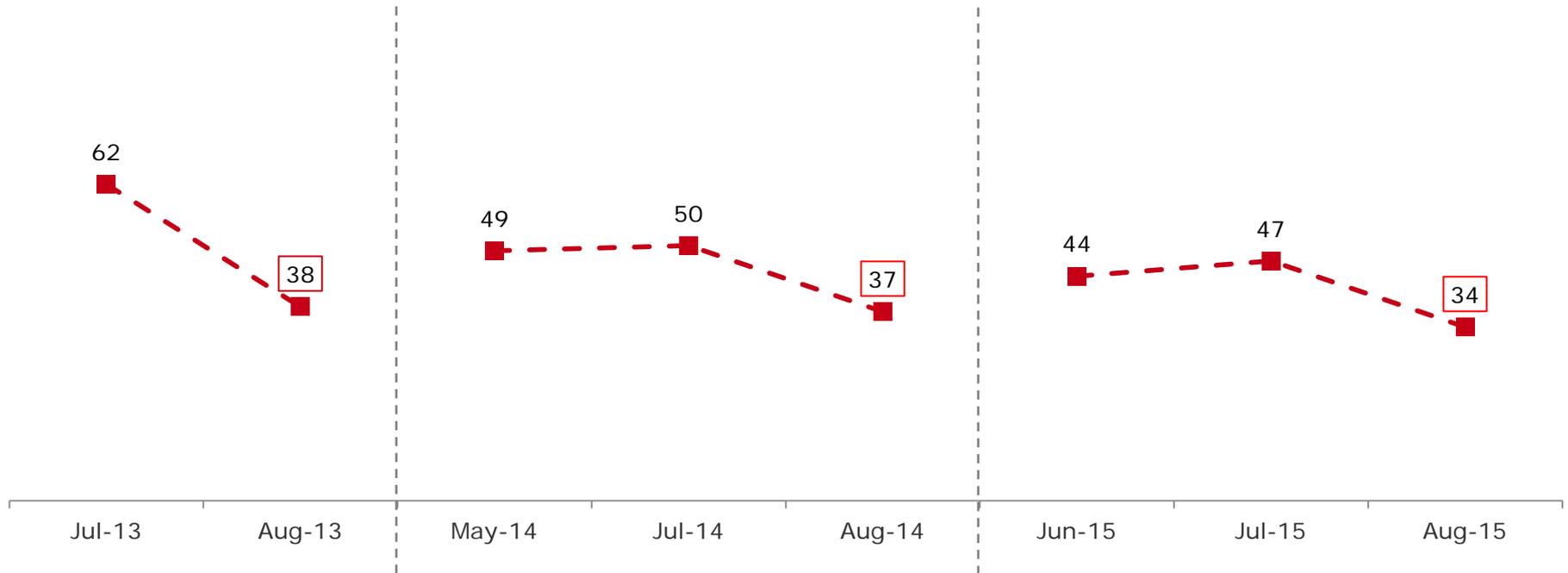
Behaviours

Behaviours

Just before the events took place, just under half of the residents said they would change travel plans during the events. After the events happened, only 34 per cent said they actually did this.

Which of these do you intend to do/ did you do?

% Change/ changed my travel plans during the events (yes)



Q8. Thinking about these events in 2015, which of the following, if any, will/did you do?

Please note: the response codes for this question changed with each wave in 2013. Data in the table refers to: May-13 – regularly/always intend to do this, Jul-13 – yes, definitely intend to do this, Aug-13 – yes, I did this.

Base: total (residents of affected boroughs) (June (500); Jul-15 (499), Aug-15 (501))

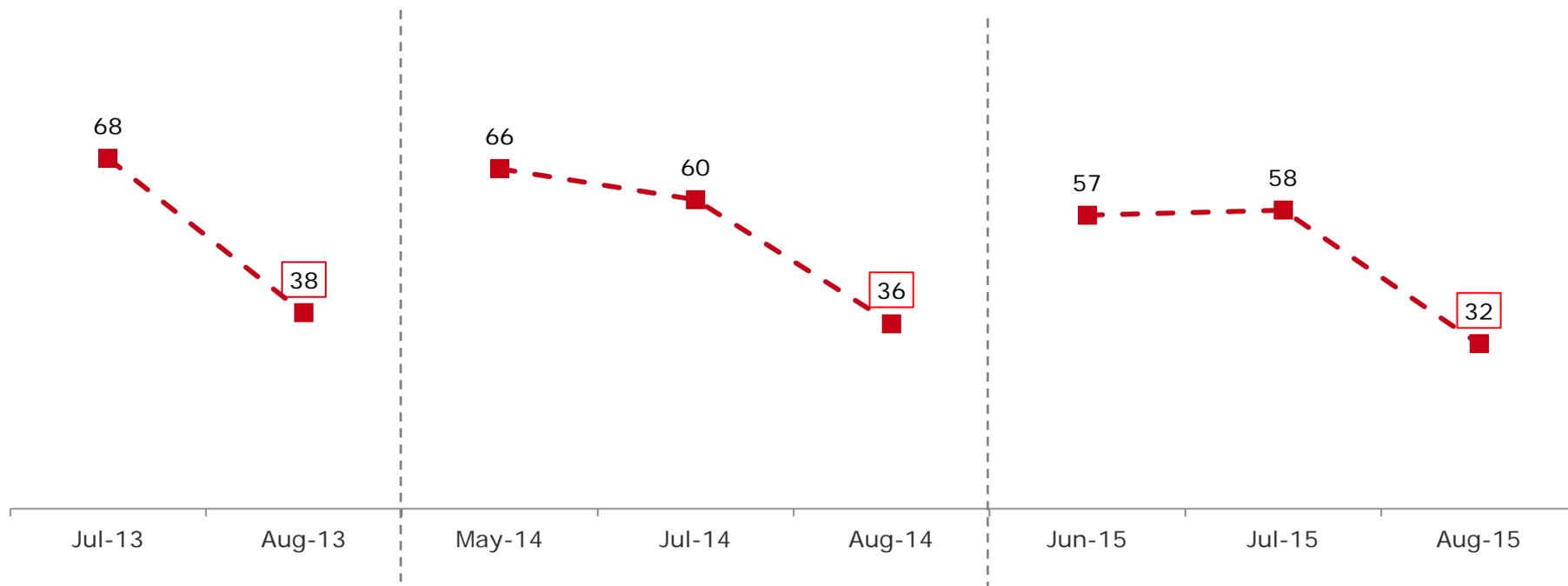
Significant decrease wave on wave

Behaviours

Prior to the event taking place, 57 per cent of residents said they would use alternative transport. In August only 32 per cent said that they actually did this.

Which of these do you intend to do/ did you do?

% Use/ used alternative transport/ routes if appropriate (yes)



Q8. Thinking about these events in 2015, which of the following, if any, will/did you do?

Please note: the response codes for this question changed with each wave in 2013. Data in the table refers to: May-13 – regularly/always intend to do this, Jul-13 – yes, definitely intend to do this, Aug-13 – yes, I did this.

Base: total (residents of affected boroughs) (June (500); Jul-15 (499), Aug-15 (501))

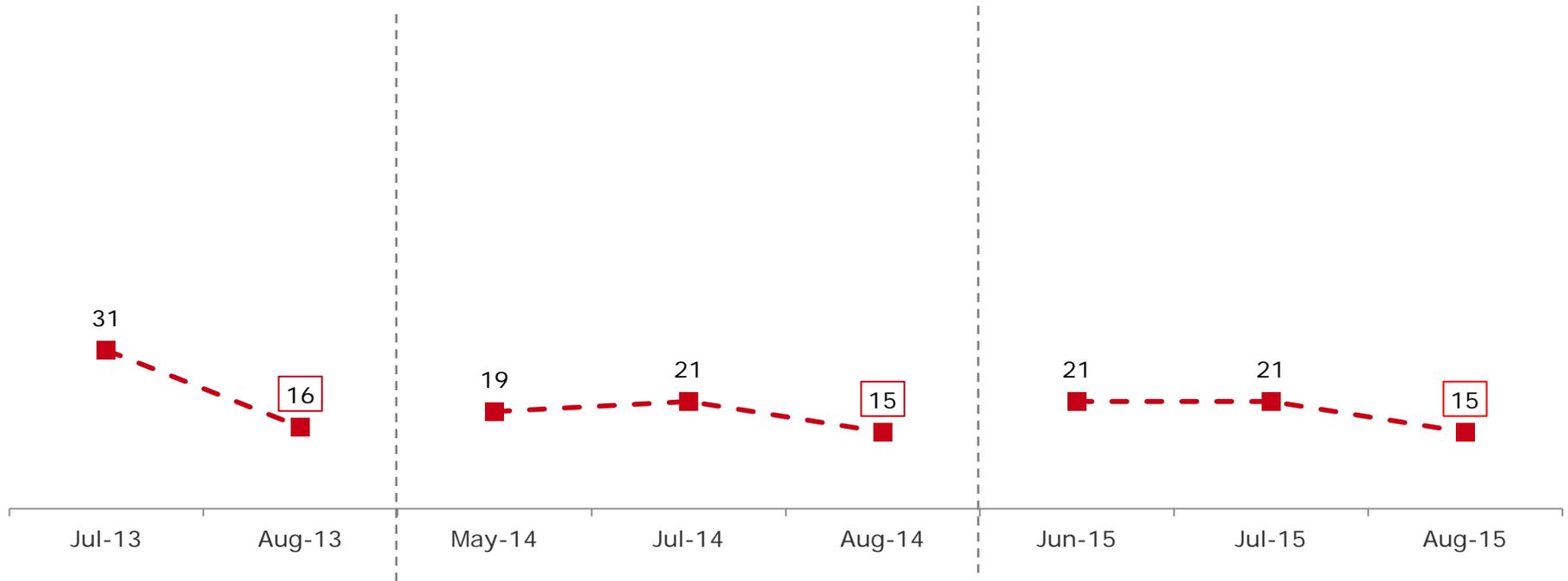
Significant decrease wave on wave

Behaviours

Just before the events, 21 per cent of residents said they would attend the events. Following the events, 15 per cent said that they did actually attend. This is in line with last year's results.

Which of these do you intend to do/ did you do?

% Attend the event(s) (yes)



Q8. Thinking about these events in 2015, which of the following, if any, will/did you do?
 Please note: the response codes for this question changed with each wave in 2013.
 Data in the table refers to: May-13 – regularly/always intend to do this,
 Jul-13 – yes, definitely intend to do this, Aug-13 – yes, I did this.
 Base: total (residents of affected boroughs) (June (500); Jul-15 (499), Aug-15 (501))

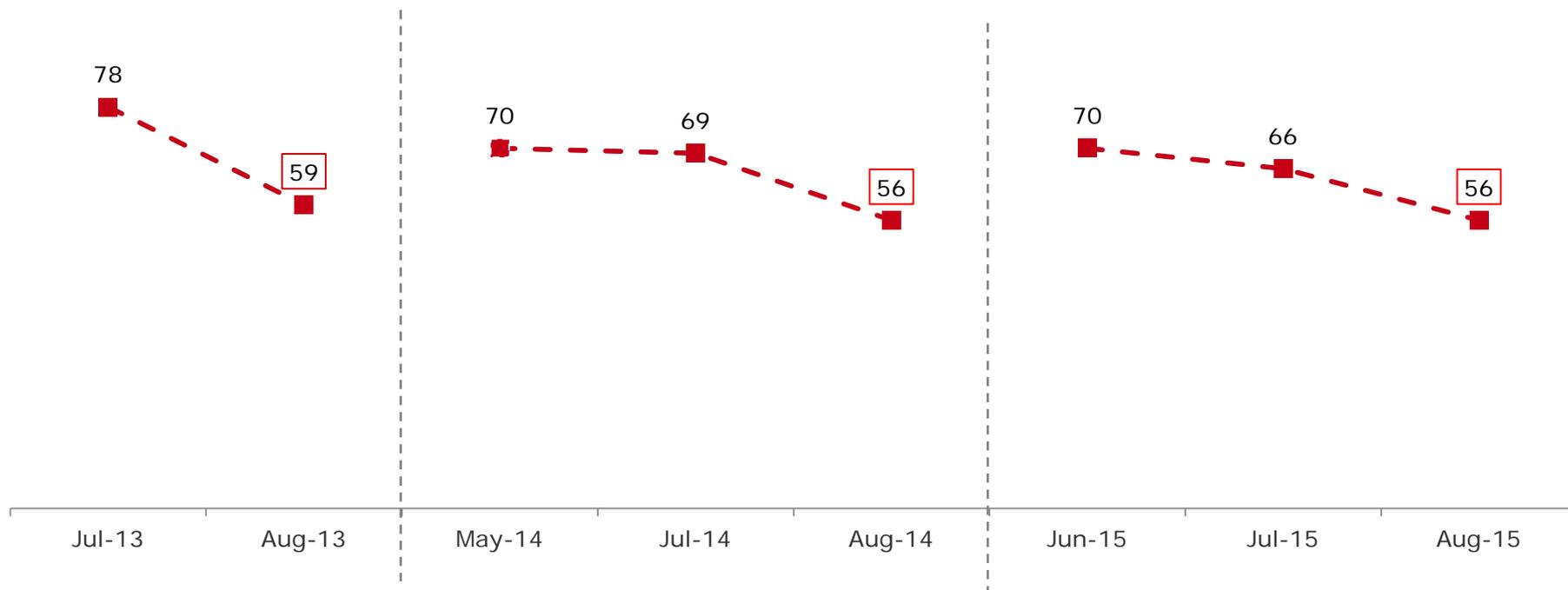
Significant decrease wave on wave

Behaviours

Before the events, 7 in 10 residents said they intended to avoid the affected areas if they were not attending the events. Following the weekend of the events, 56 per cent said they actually did this.

Which of these do you intend to do/ did you do?

% Avoid/ avoided the affected the areas on the relevant days if not attending an event (yes)



Q8. Thinking about these events in 2015, which of the following, if any, will/did you do?

Please note: the response codes for this question changed with each wave in 2013.

Data in the table refers to: May-13 – regularly/always intend to do this,

Jul-13 – yes, definitely intend to do this, Aug-13 – yes, I did this.

Base: total (residents of affected boroughs) (June (500); Jul-15 (499), Aug-15 (501))

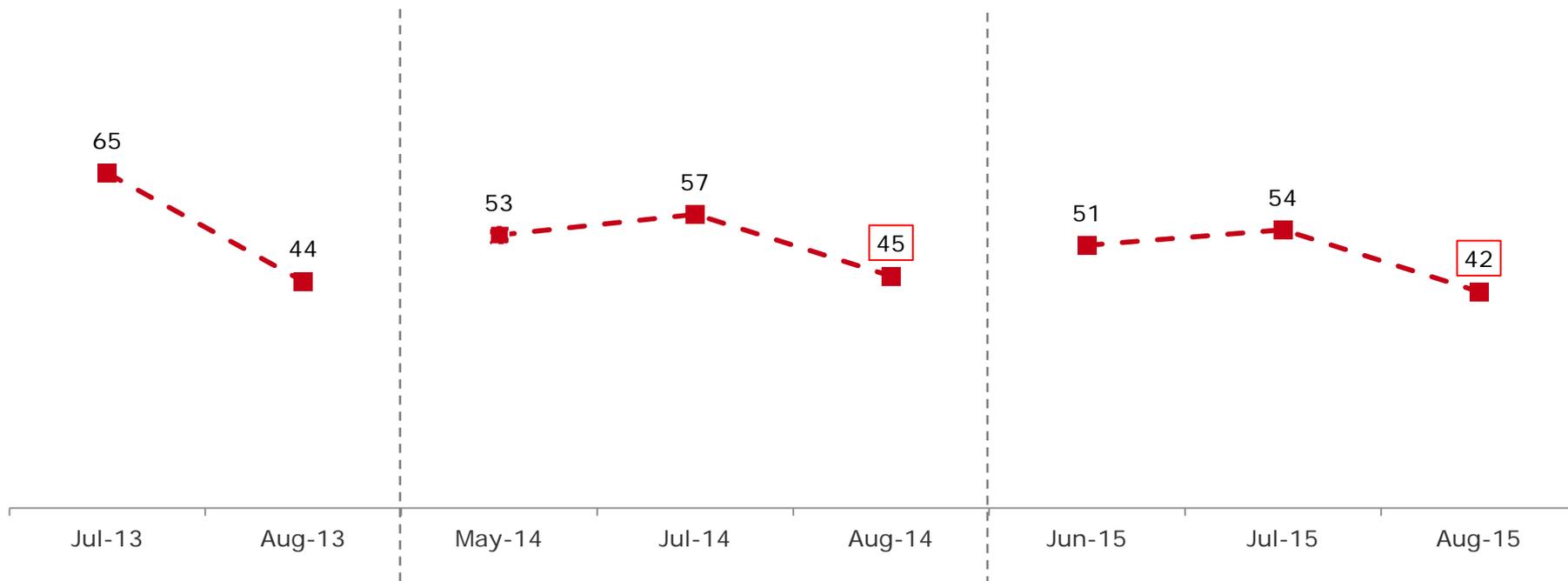
Significant decrease wave on wave

Behaviours

Over half of residents said that they would be reminding their friends about the events, so that they could make plans to avoid disruption. 42 per cent said they actually did this.

Which of these do you intend to do/ did you do?

% Remind/ reminded my friends about the events so they can make plans to avoid disruption



Q8. Thinking about these events in 2015, which of the following, if any, will/did you do?

Please note: the response codes for this question changed with each wave in 2013.

Data in the table refers to: May-13 – regularly/always intend to do this,

Jul-13 – yes, definitely intend to do this, Aug-13 – yes, I did this.

Base: total (residents of affected boroughs) (June (500); Jul-15 (499), Aug-15 (501))

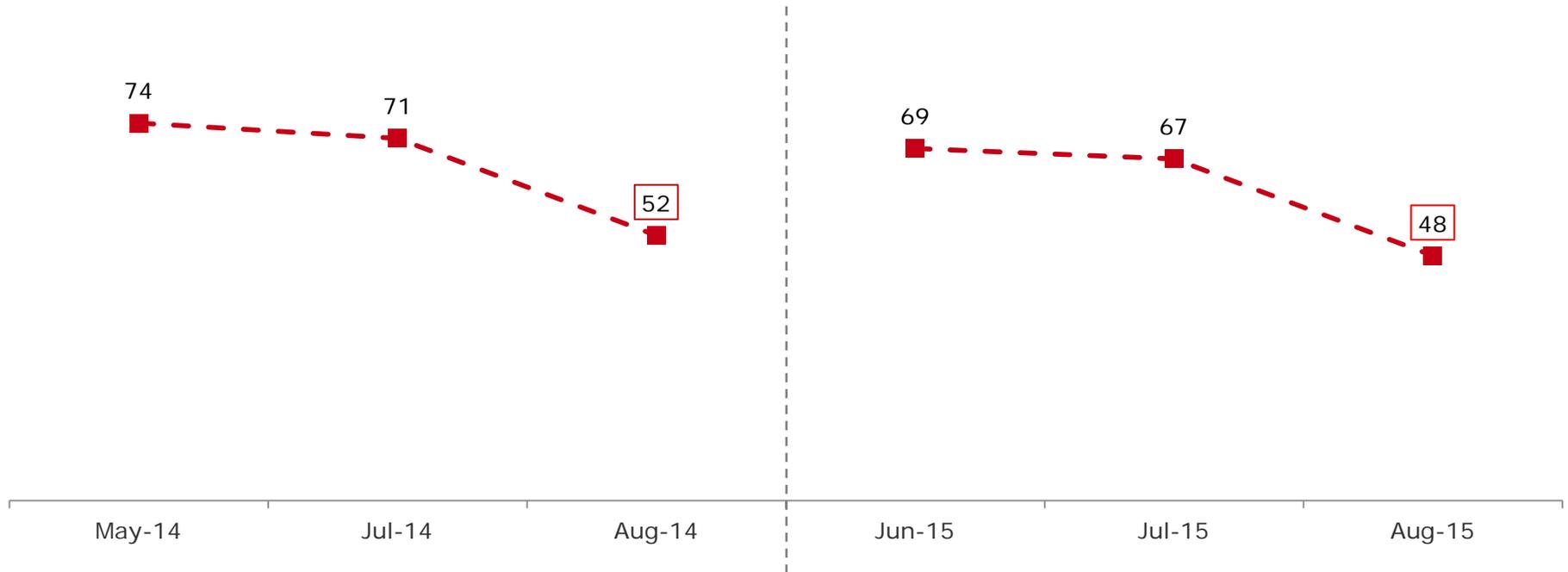
Significant decrease wave on wave

Behaviours

Just before the events took place, more than two thirds of residents said they would check to see if their journeys would be affected - only around half said that they actually did this.

Which of these do you intend to do/ did you do?

% Check/checked to see if my journeys will/would be affected



Q8. Thinking about these events in 2015, which of the following, if any, will/did you do?
Base: total (residents of affected boroughs) (June (500); Jul-15 (499), Aug-15 (501))

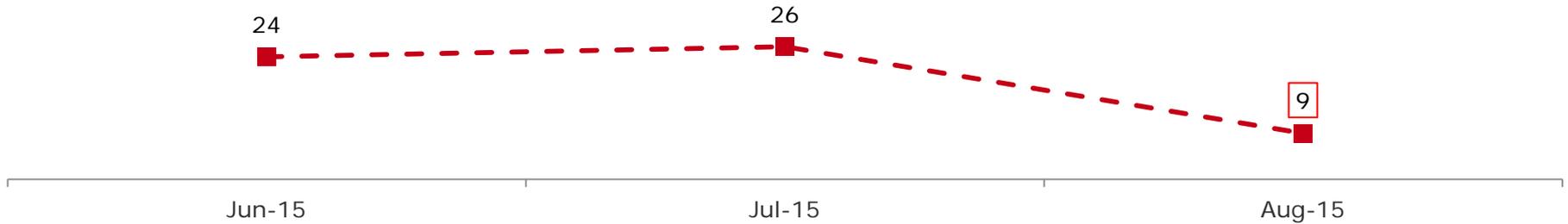
 Significant decrease wave on wave

Behaviours

Before the events, 24 per cent of residents said they would move their car prior to the event if they lived close to the route. Following the weekend of the events, only 9 per cent said they had done it.

Which of these do you intend to do/ did you do?

% Move/ moved my car prior to the event if I live close to the route



Q8. Thinking about these events in 2015, which of the following, if any, will/did you do?
Base: total (residents of affected boroughs) (June (500); Jul-15 (499), Aug-15 (501))

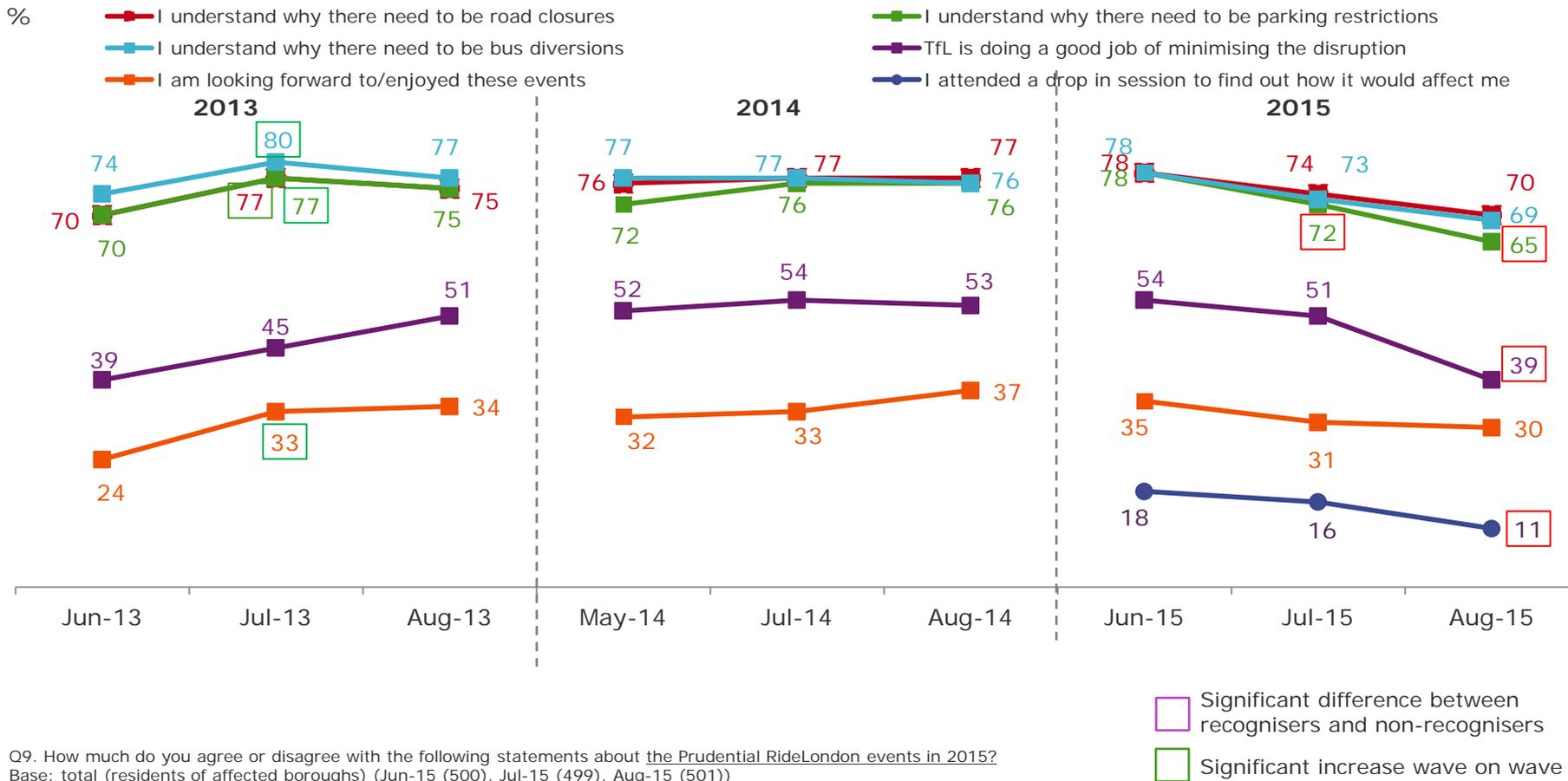
9 Significant decrease wave on wave

5

Attitudes

Attitudes

Post event 7 in 10 residents agreed they understood the need for road closures, bus diversions and just under two thirds understood the need for parking restrictions - all slightly lower than last year's survey. Just under 4 in 10 the residents agreed TfL did a good job of minimising disruption, a big decrease compared to last year.

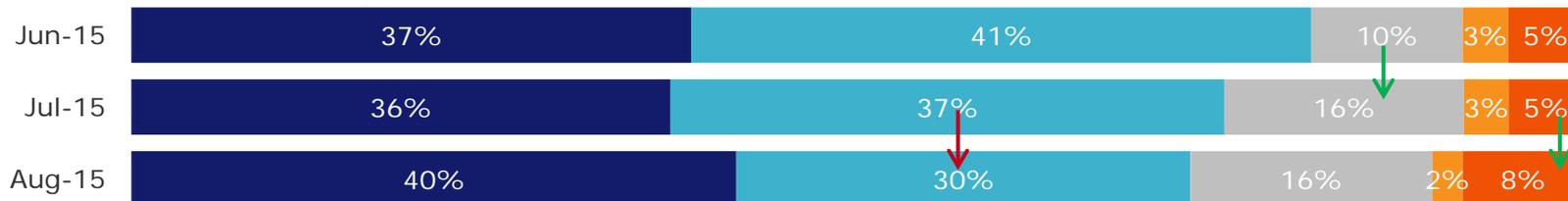


Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015?
Base: total (residents of affected boroughs) (Jun-15 (500), Jul-15 (499), Aug-15 (501))

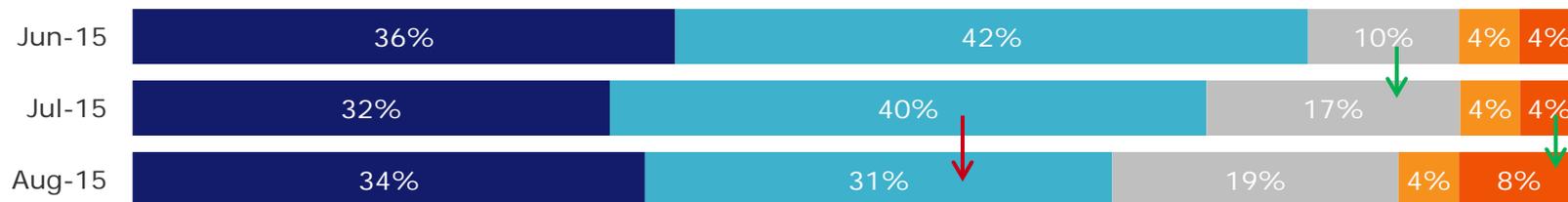
Attitudes

Percentage of those who agree strongly/slightly with the need for road closures, parking restrictions or bus diversions decreased significantly between June and August 2015.

I understand/understood why there needs/needed to be road closures (in %)



I understand/understood why there needs/needed to be parking restrictions (in %)



I understand/understood why there needs/needed to be bus diversion (in %)



■ Agree strongly ■ Agree slightly ■ Neither agree nor disagree ■ Disagree slightly ■ Disagree strongly

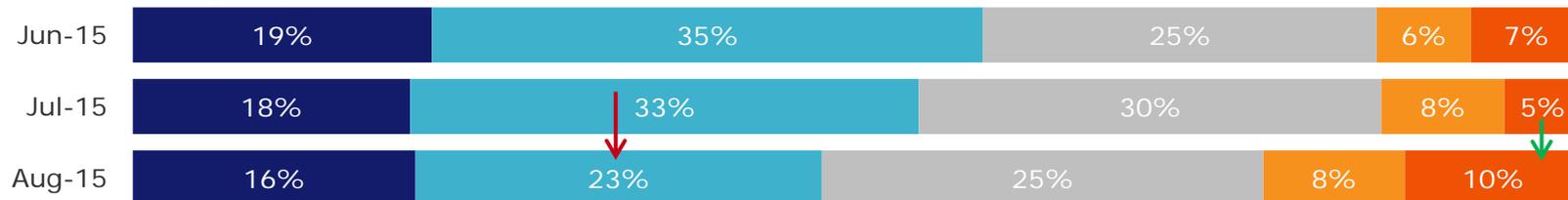
Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015? Base: total Jun-15 (500), Jul-15 (499), Aug-15 (501)

→ Significant increase/ decrease wave
→ on wave

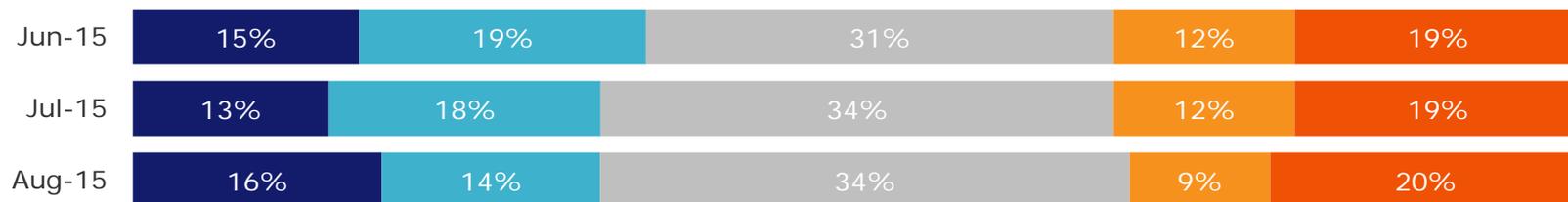
Attitudes

The number of those who thought TfL did a good job of minimising disruption decreased over the three waves. Levels of disagreements for 'I attended a drop in session to find out how the events would affect me' increased significantly after the events took place.

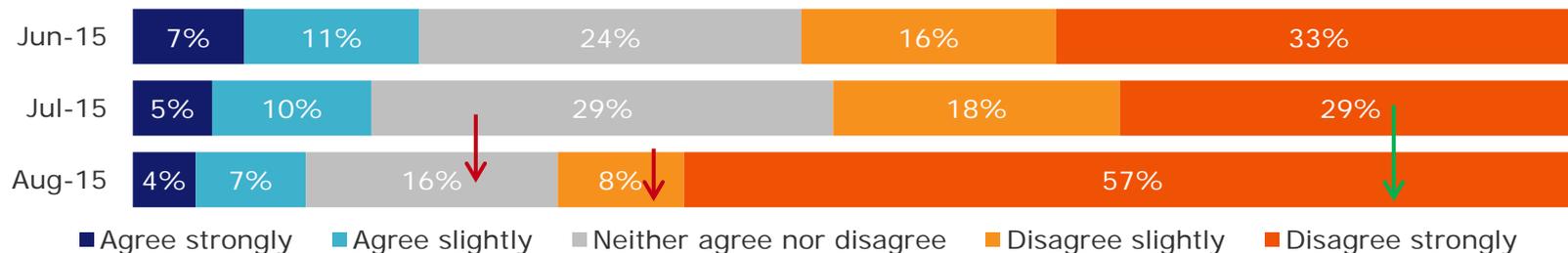
TfL is doing/did a good job of minimising disruption (in %)



I am looking forward to these events/ I enjoyed these events (in %)



I attended a drop in session to find out how the events would affect me (in %)



■ Agree strongly ■ Agree slightly ■ Neither agree nor disagree ■ Disagree slightly ■ Disagree strongly

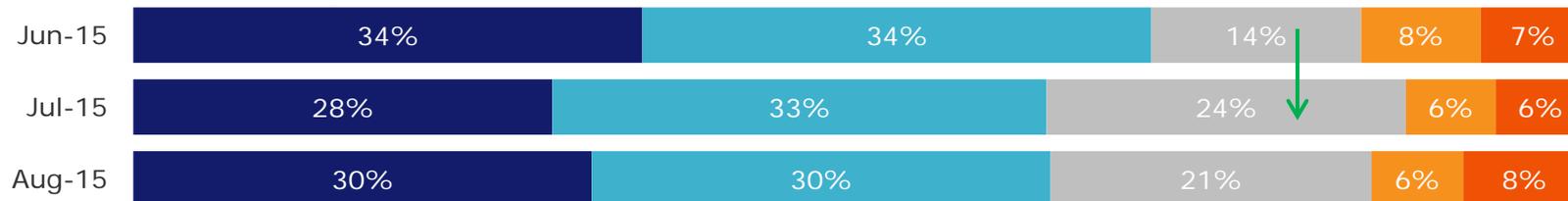
Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015?
Base: total Jun-15 (500), Jul-15 (499), Aug-15 (501)

→ Significant increase/ decrease wave
→ on wave

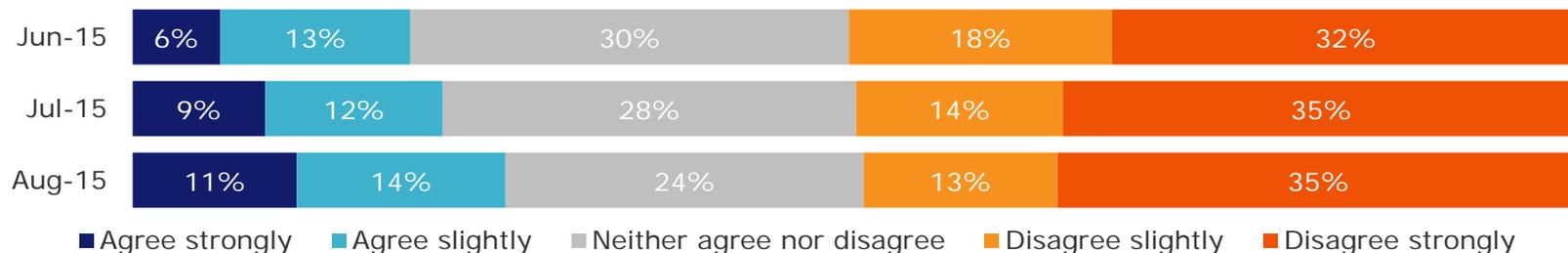
Attitudes

Thinking that events like this are good for London became more neutral just before the event took place. After the event, only 1 in 4 agreed that events like this would encourage them to visit London, but this did increase over the three waves.

I think events like this are good for London (in %)



I think event like this would encourage me to visit London (in %)



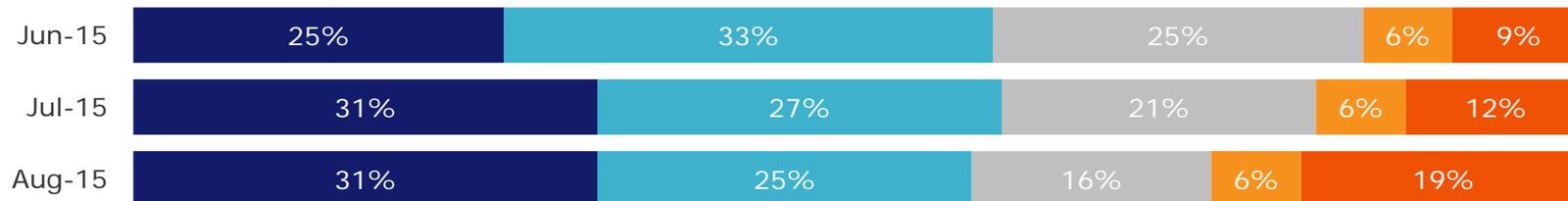
→ Significant increase/ decrease wave
→ on wave

Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015?
Base: total Jun-15 (500), Jul-15 (499), Aug-15 (501)

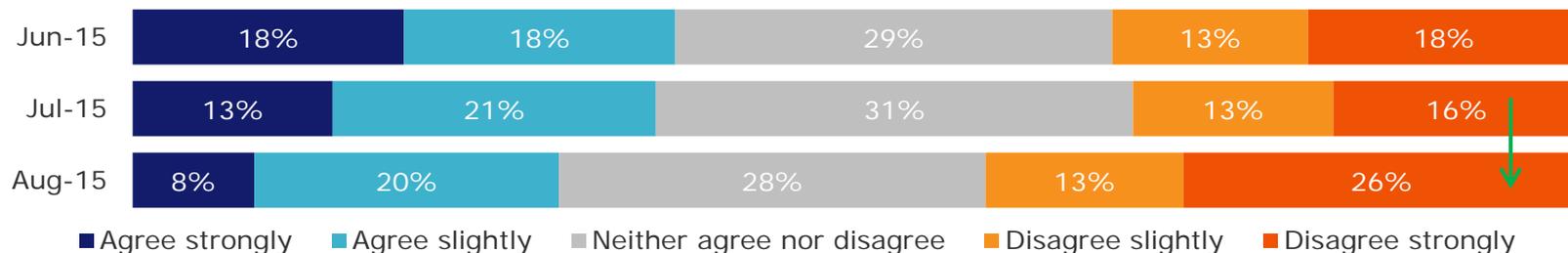
Attitudes

The level of those who agreed strongly they think events like this are good for Surrey increased just before the event took place. However, the level who agreed that the event would encourage them to visit Surrey decreased over time.

I think events like this are good for Surrey (in %)



I think event like this would encourage me to visit Surrey (in %)



Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015?
Base: total (250 per wave)

→ Significant increase/ decrease wave
→ on wave

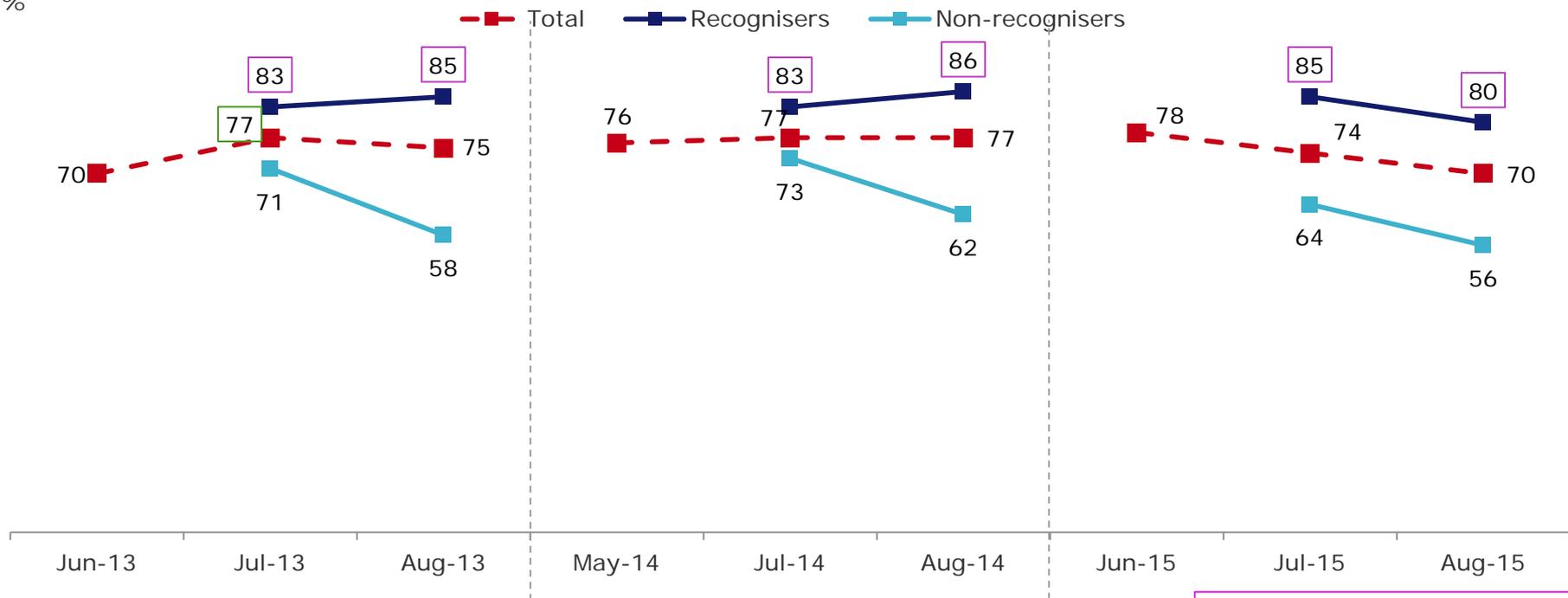
Attitudes

7 in 10 residents agreed that they understood the need for road closures – a slightly lower level than last year. Levels of agreement were significantly higher among campaign recognisers.

I understand why there needs to be road closures/ I understood why there needed to be road closures

Net: agree strongly/ agree slightly

%



Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015?

Base: total (residents of affected boroughs) (501 per wave)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

- Significant difference between recognisers and non-recognisers
- Significant decrease wave on wave
- Significant increase wave on wave

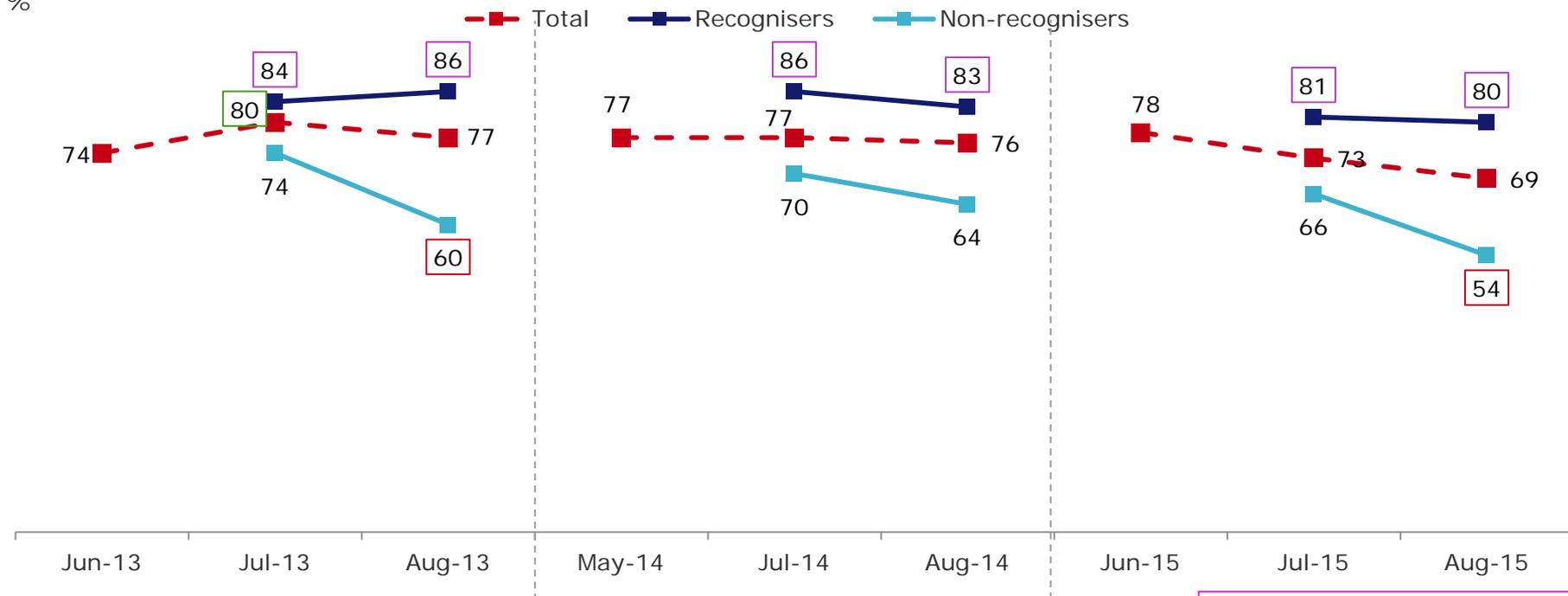
Attitudes

The same applied when asking about bus diversions – nearly 7 in 10 residents agreed that they understood the needs for bus diversions (again, lower than last year). Agreement levels were significantly higher among campaign recognisers.

I understand why there needs to be bus diversions/ I understood why there needed to be bus diversions

Net: agree strongly/ agree slightly

%



Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015?

Base: total (residents of affected boroughs) (501 per wave)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

- Significant difference between recognisers and non-recognisers
- Significant decrease wave on wave
- Significant increase wave on wave

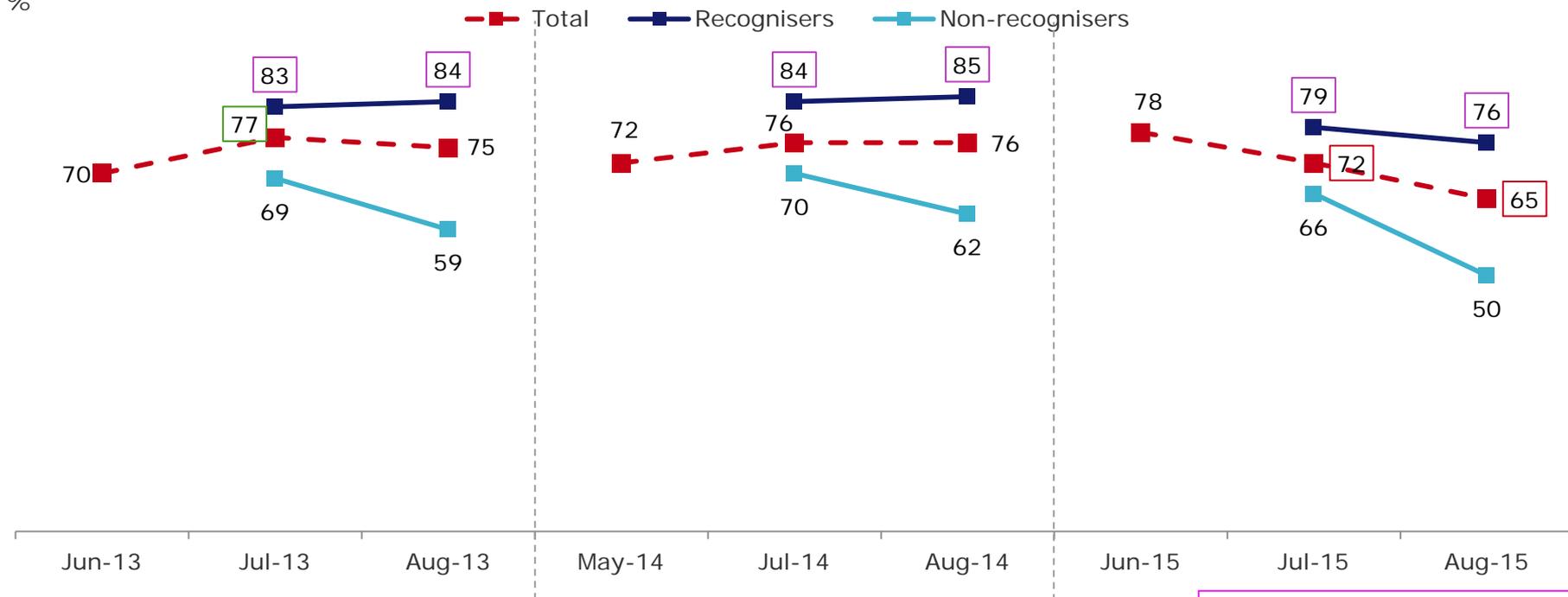
Attitudes

Just under two thirds of residents after the event agreed that they understood the needs for parking restrictions – much lower than last year. Agreement levels were significantly lower after the events took place notably among non-recognisers.

I understand why there needs to be parking restrictions/ I understood why there needed to be parking restrictions

Net: agree strongly/ agree slightly

%



Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015?

Base: total (residents of affected boroughs) (501 per wave)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

- Significant difference between recognisers and non-recognisers
- Significant decrease wave on wave
- Significant increase wave on wave

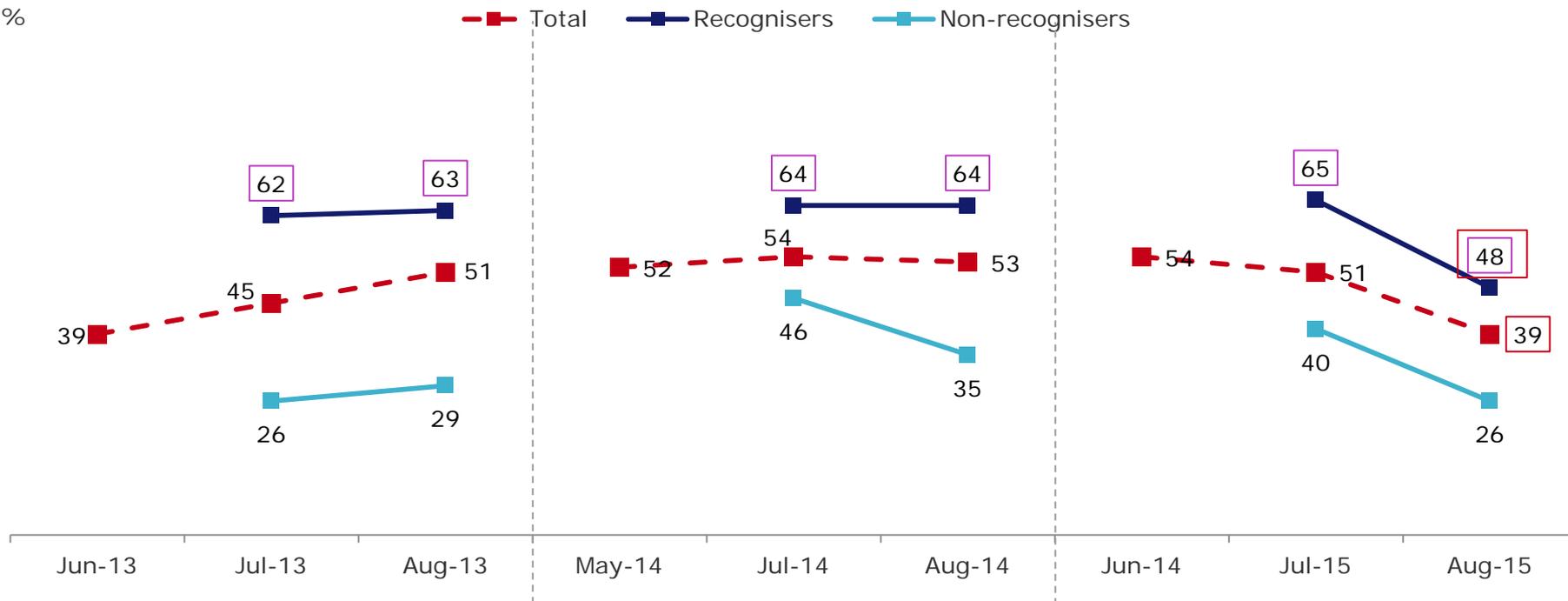
Attitudes

Almost 4 in 10 residents agreed, post event, that TfL had done a good job of minimising disruption - this is significantly lower than last year. Recognisers were still likely to agree with this than non-recognisers.

Transport For London has done a good job of minimising disruption by helping with planning and communicating alternatives/ TfL did a good job of minimising disruption....

Net: agree strongly/ agree slightly

%



Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015?

Base: total (residents of affected boroughs) (501 per wave)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Significant decrease wave on wave

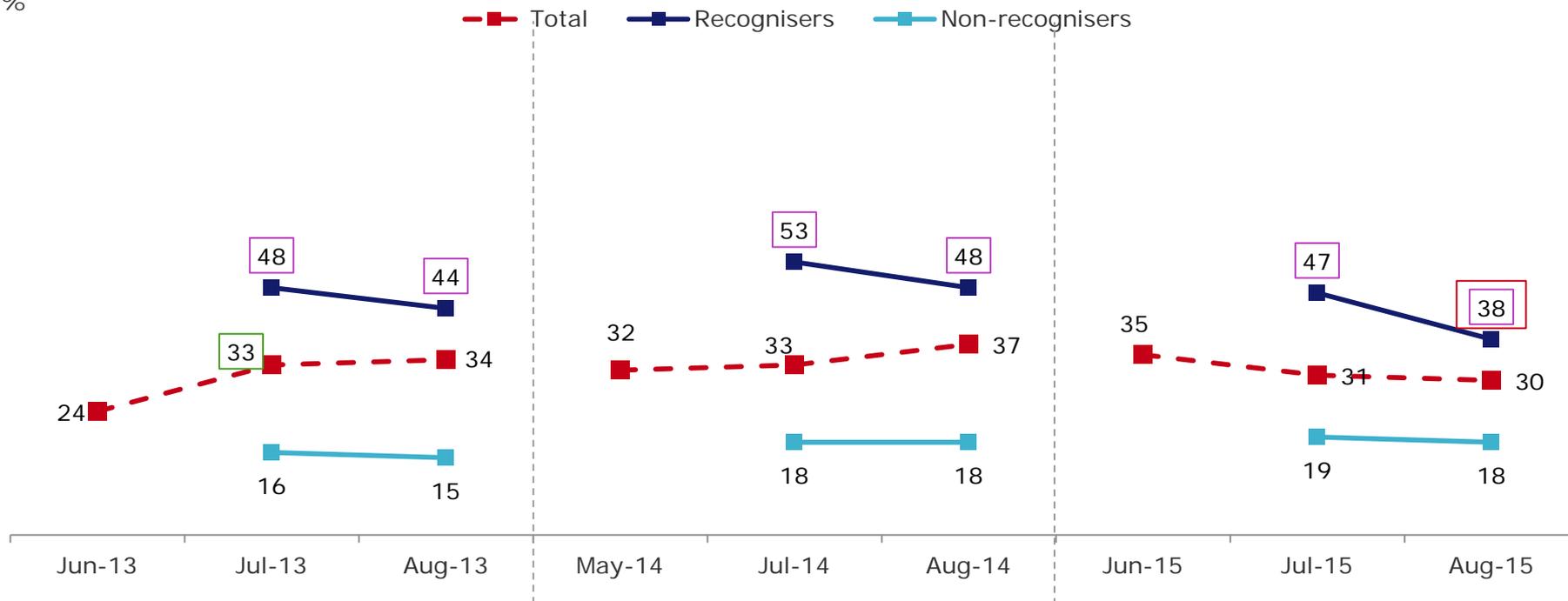
Attitudes

The proportion of residents who agreed they were 'looking forward to the events' remained at the same level after the event had taken place – 30 per cent agreeing they had 'enjoyed the events'.

I am looking forward to these events/I enjoyed these events

Net: agree strongly/ agree slightly

%



Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015?

Base: total (residents of affected boroughs) (501 per wave)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Significant decrease wave on wave

Attitudes

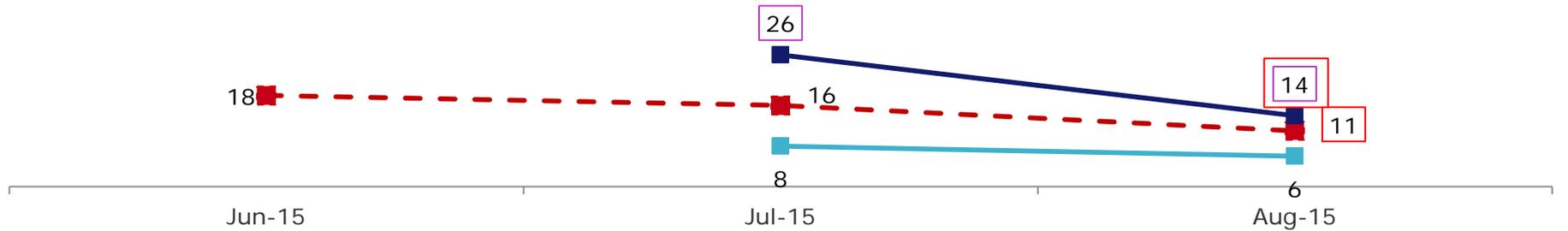
Levels of agreement with 'I attended a drop in session to find out how the events would affect me' after the events took place was lower, notably among the recognisers' group.

I attended a drop in session to find out how the events would affect me

Net: agree strongly/ agree slightly

%

■ Total ■ Recognisers ■ Non-recognisers



Q9. How much do you agree or disagree with the following statements about the Prudential RideLondon events in 2015?
 Base: total (residents of affected boroughs) (501 per wave)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers
 Significant decrease wave on wave
 Significant increase wave on wave

6

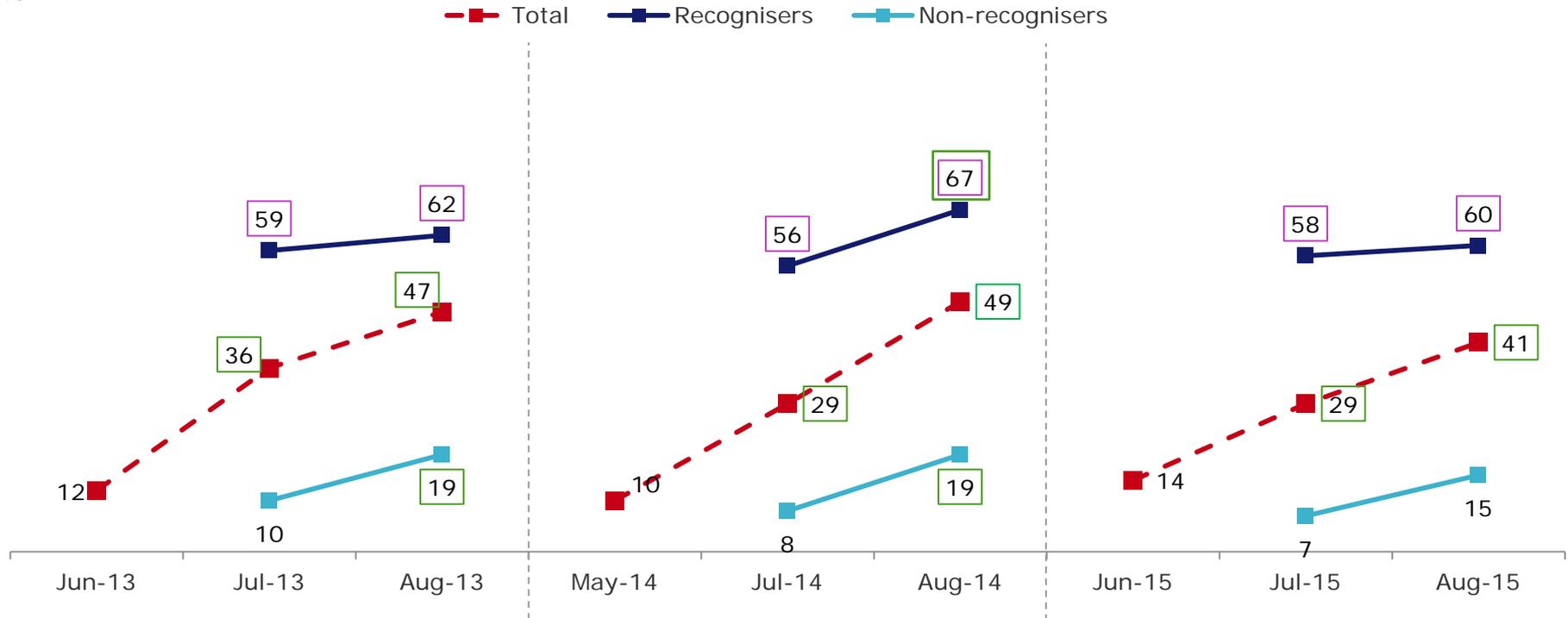
Ad and PR awareness

General ad awareness

The proportion of residents in affected boroughs who said they recalled advertising generally about the road closures or planned changes to transport due to the events increased following the campaign and was higher among ad recognisers. The post event level was however lower than in 2013 and 2014.

Yes

%



Q12. Thinking specifically about advertising, have you seen or heard any advertising about the road closures or planned changes to transport due to the Prudential RideLondon cycle events in 2015 in the past month?

Base: total (residents of affected boroughs) (501 per wave)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

- Significant difference between recognisers and non-recognisers
- Significant increase wave on wave

Campaign recall (open response)

When asked what they could recall about the advertising, the most frequently mentioned topics after the events involved details of the road closures/disruptions (due to the event) with just over a quarter of residents citing this.

Total



(2014 data)

□ Significant decrease wave on wave

□ Significant increase wave on wave

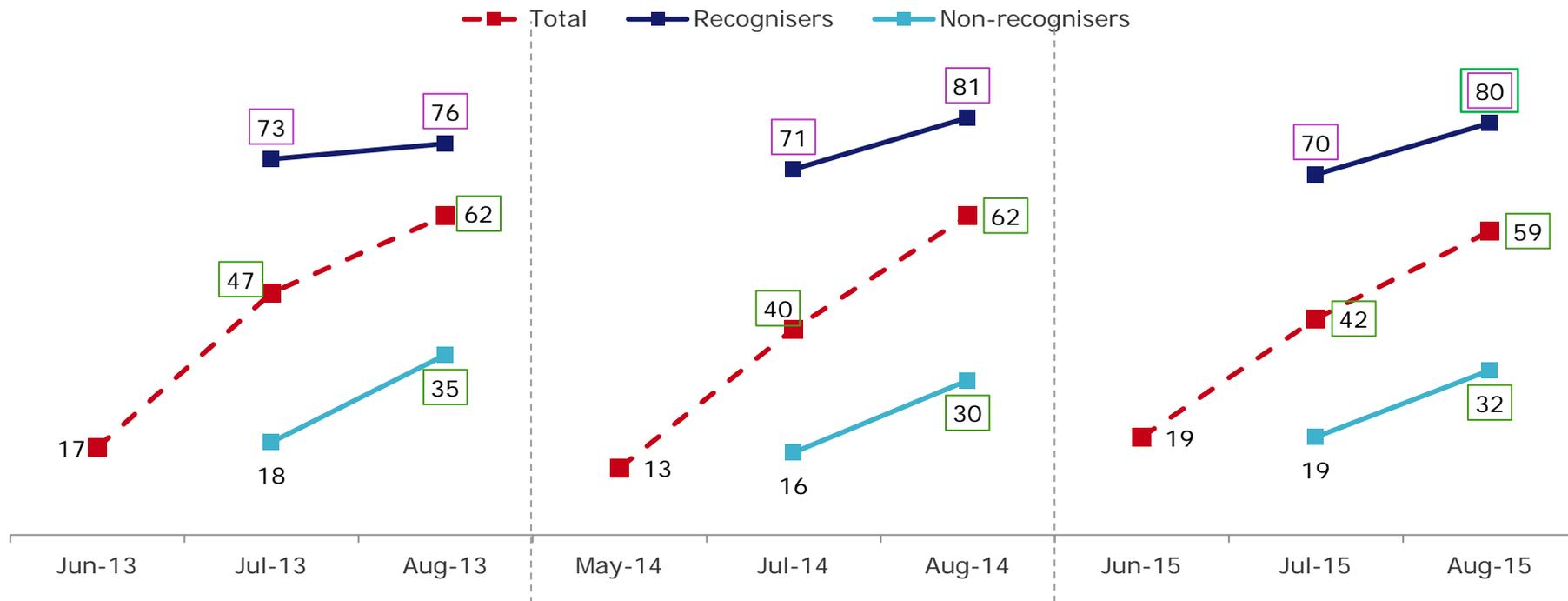
Q13. What can you remember? What did it show or say?
 Base: those who recall advertising, Jun-15 (108), Jul-15 (225), Aug-15 (318)

PR (non-ad) awareness

Recall of other information about the road closures or planned changes to transport (due to the events) also increased significantly following the campaign, to levels fairly similar to 2013 and 2014, and was higher among ad recognisers.

Yes

%



Q10. Have you seen or heard anything about the road closures or planned changes to transport due to the Prudential RideLondon cycle events in 2015 in the past month? By this I mean information in the newspaper, on a TV programme or radio programme, on the internet, comments from your friends or other people you know or anything else.

Base: total (residents of affected boroughs) (501 per wave)

Recognisers, Jul-15 (222), Aug-15 (288)

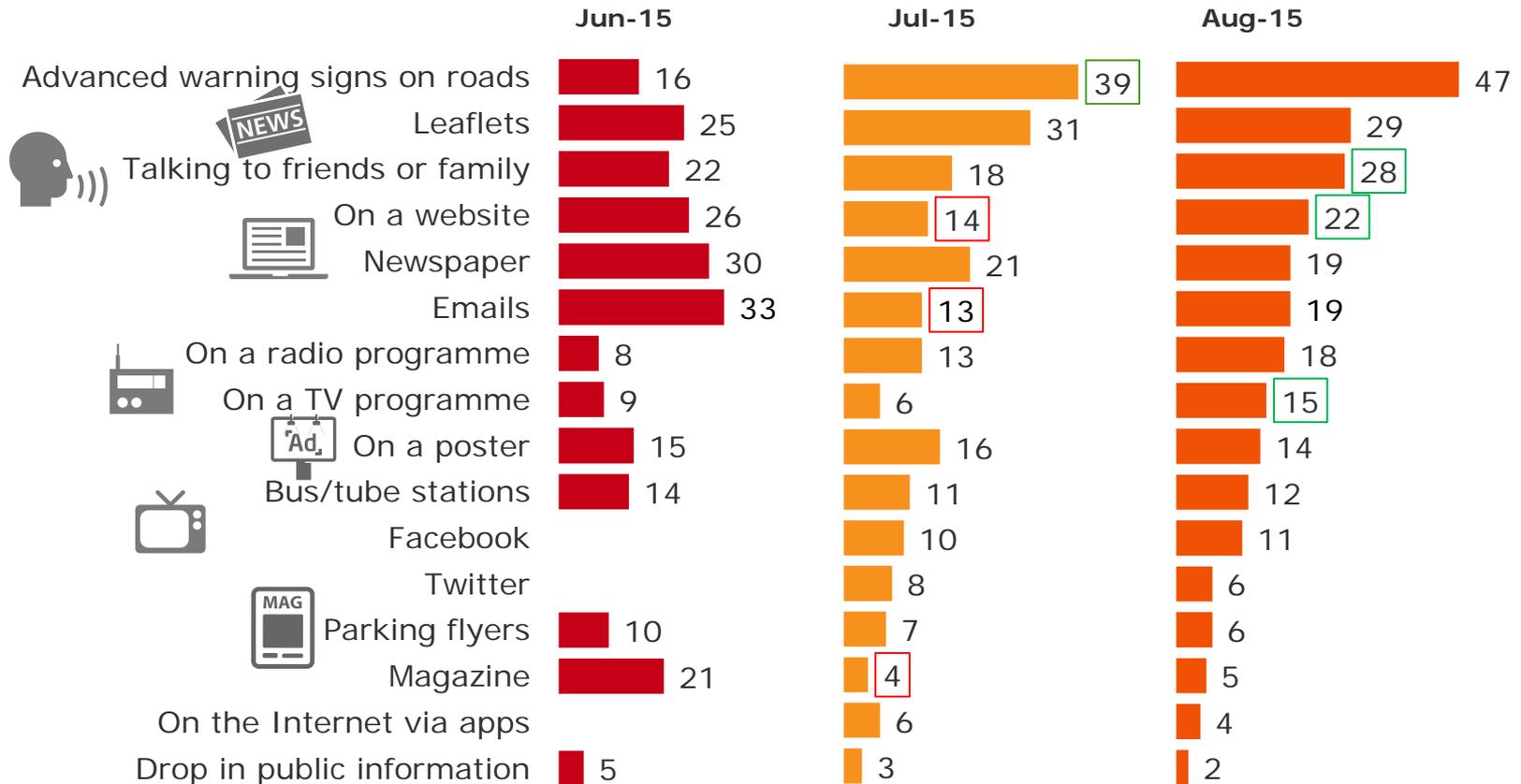
Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Significant increase wave on wave

Source of PR

Advanced warning signs on roads, leaflets and talking to friends/ family were the most frequently recalled forms of information about road closures. There were several increases from July to August: talking to friends/ family, seeing information on a website or on a TV programme.



Q11. Where did you see or hear something about the road closures or planned changes to transport that happen/happened due to the Prudential RideLondon cycle events in 2015?
 Base: those aware of PR, Jun-15 (97), Jul-15 (210), Aug-15 (297)

7

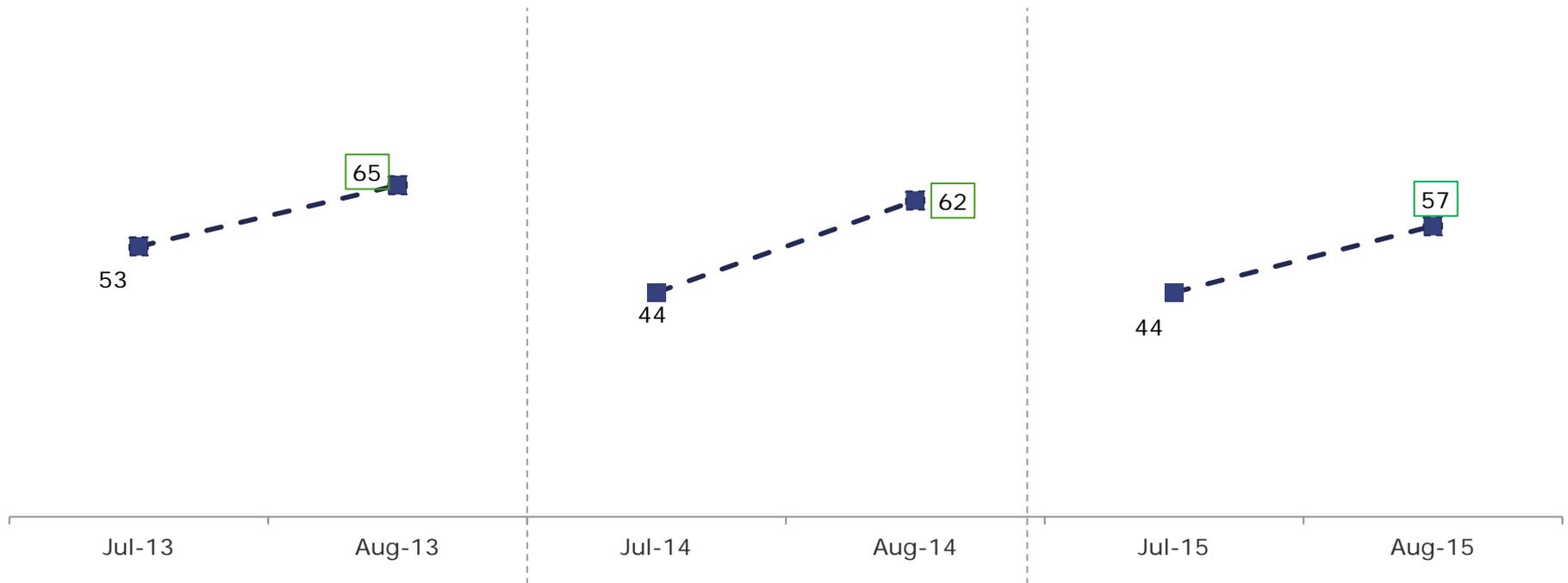
Campaign recognition

Overall campaign recognition

Claimed recognition of any ads increased from 44 to 57 per cent. However post-event campaign recognition is slightly lower than previous year (NB: There were lower spends this year.)

Recognise any ad

%



Significant increase wave on wave

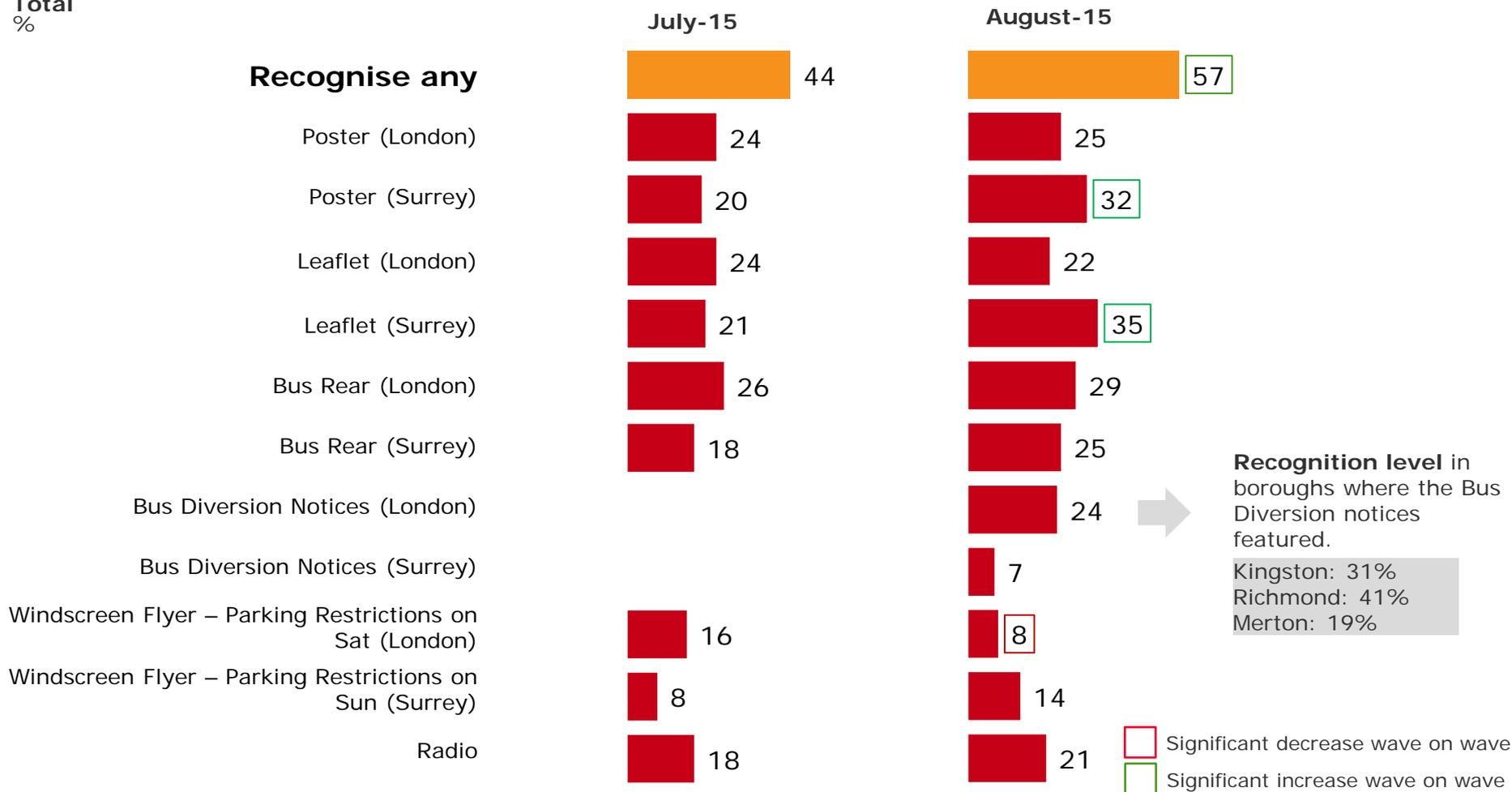


Q14, Q14b & Q15. Have you seen any of these ads before?
Base: total (residents of affected boroughs) (500 per wave)

Campaign recognition (i)

From just before the events took place to the final wave of research just after, recognition of any campaign element rose significantly, to 57 per cent. The main individual elements to increase were posters (Surrey) and leaflets (also Surrey).

Total %

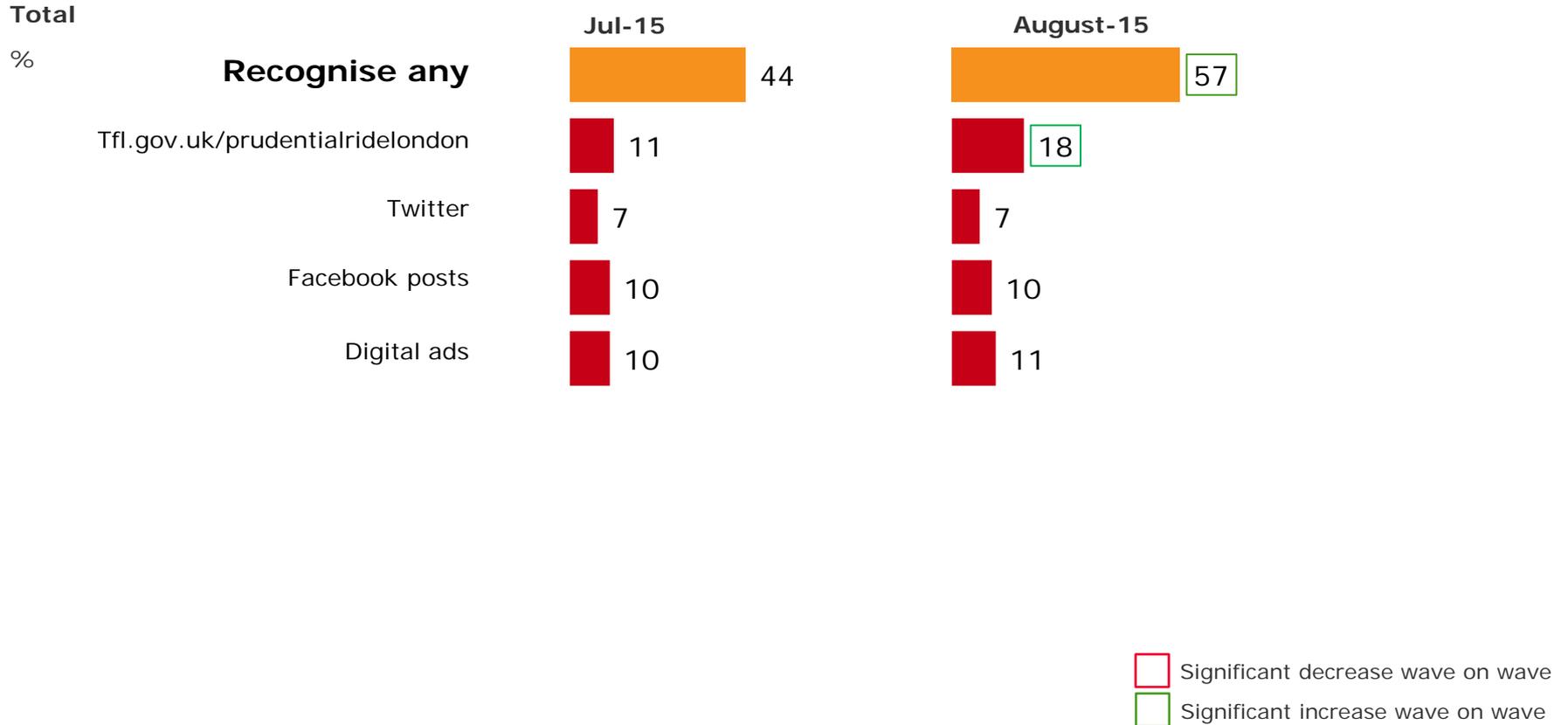


Q14, Q14b & Q15. Have you seen any of these ads before?
 Base: total (residents of affected boroughs) (500 per wave)



Campaign recognition (ii)

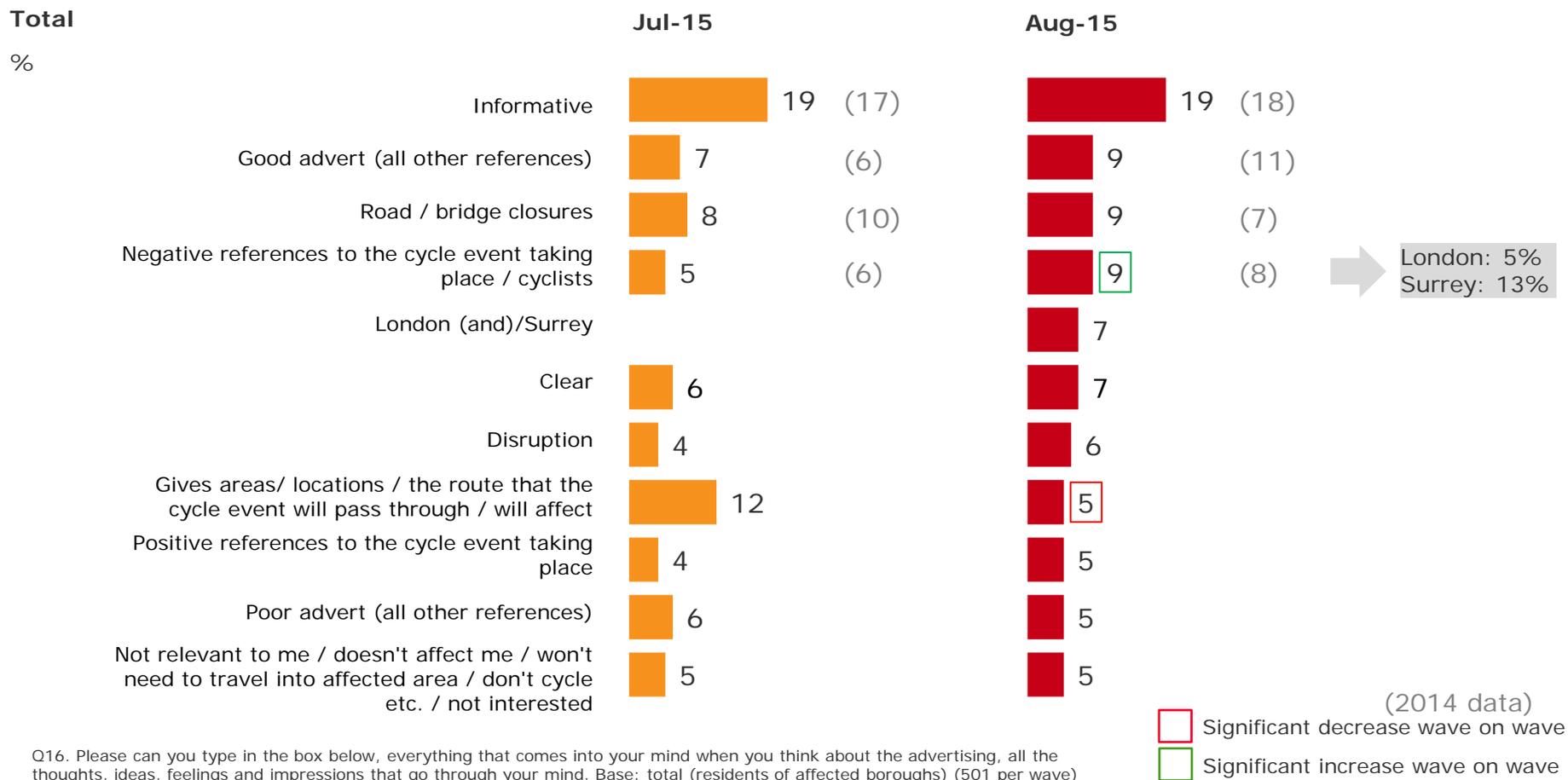
From just before the events took place to the final wave of research just after, recognition of the RideLondon website also increased significantly. Recognition of other social media elements remained stable.



Q14b. Have you seen anything about the 2014 Prudential RideLondon events on social media/internet?
Base: total (residents of affected boroughs) (501 per wave)

Campaign response (open response)

When asked to note down everything that came to mind when thinking about the campaign, being informative was mentioned most frequently. Negative references to the event taking place did increase in August, but remained below 10 per cent.



Q16. Please can you type in the box below, everything that comes into your mind when you think about the advertising, all the thoughts, ideas, feelings and impressions that go through your mind. Base: total (residents of affected boroughs) (501 per wave)

8

Road signs/drop in centres/bus diversion notices

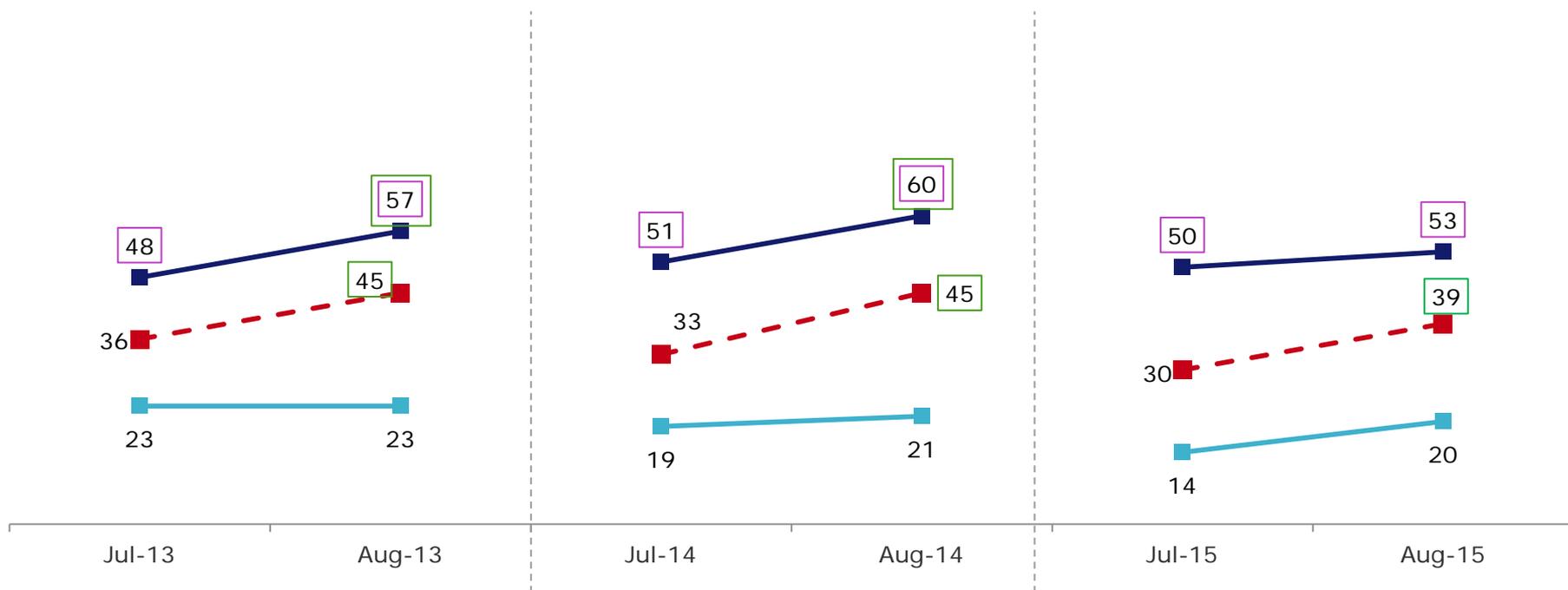
Road signs

The proportion of residents who said they had seen warning signs on the roads increased significantly from July 2015 to August 2015, although it was at a lower level than 12 months previously. Just over half of recognisers saw warning signs post events.

Advanced warning signs on the roads giving information about the likely disruption

%

—■ Total —■ Recognisers —■ Non-recognisers



Q17. Did you see or attend any of the following?
 Base: total (residents of affected boroughs) (501 per wave)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

■ Significant difference between recognisers and non-recognisers
 □ Significant increase wave on wave

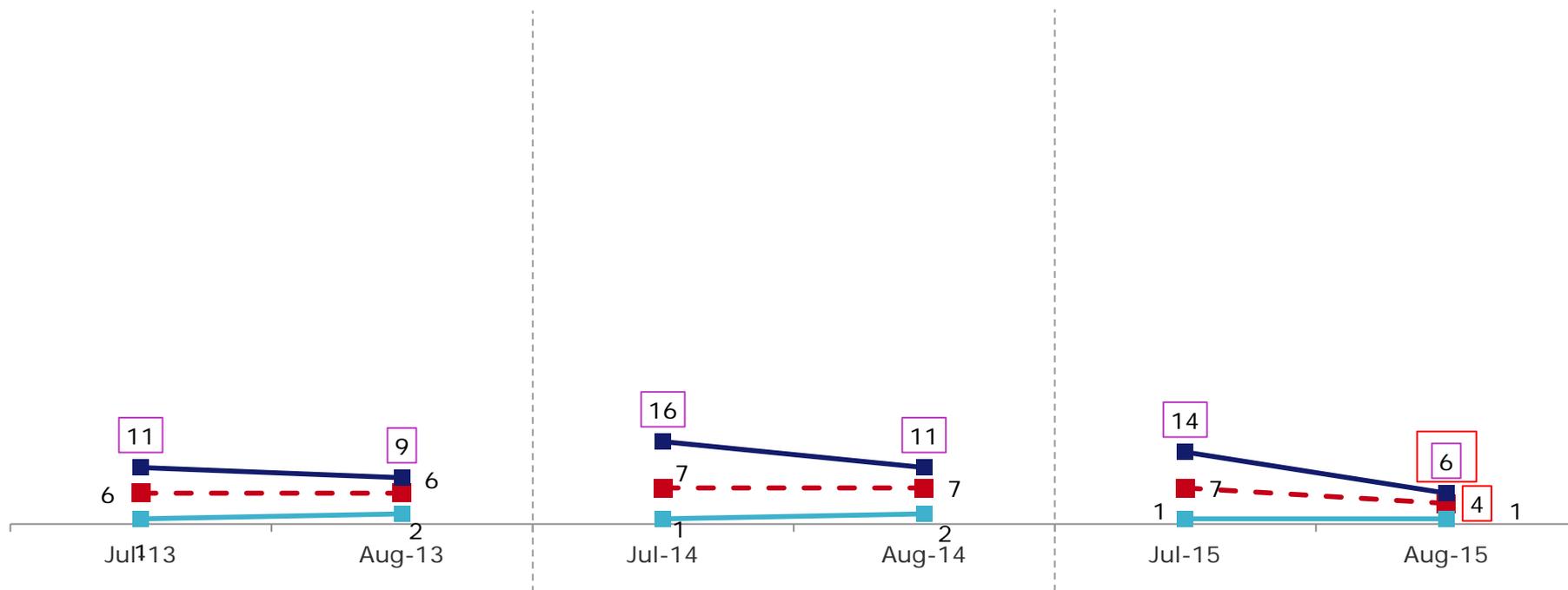
Drop in centres

The attendance for the drop in public information sessions was slightly lower than last year, with 4 per cent of residents saying they had been to these in August 2015, although this was still higher among recognisers.

Drop in public information sessions held in your borough

%

—■ Total —■ Recognisers —■ Non-recognisers



Significant difference between recognisers and non-recognisers

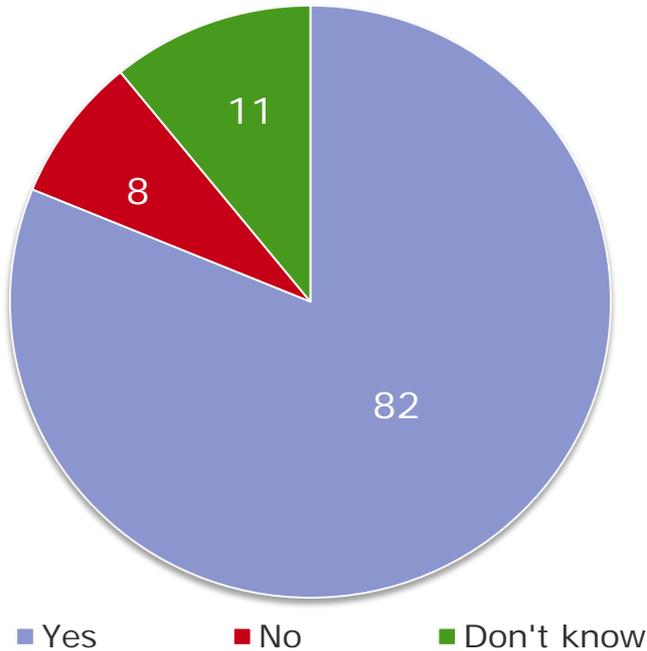
Q17. Did you see or attend any of the following?
 Base: total (residents of affected boroughs) (501 per wave)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Understanding of bus diversion notices

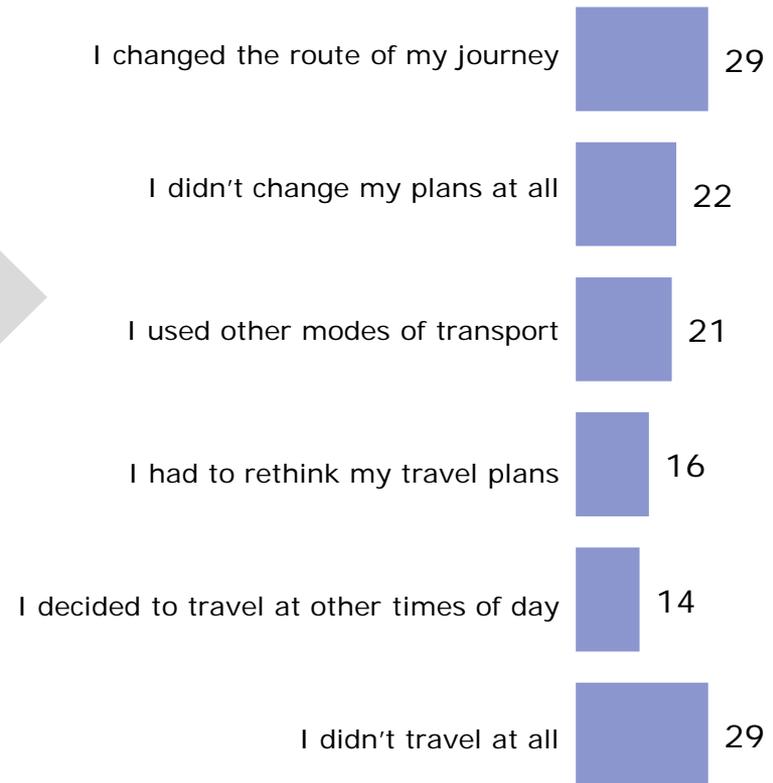
Over eight out of ten who saw the diversion notices in Kingston and Twickenham said they understood them. Of these, nearly three out of ten said they changed the route of their journey. However the same proportion said they did not travel at all as a result.

Understood bus diversion notices

% Yes



Actions after seeing bus diversion notices



Q14a. Did you find the information on the bus diversion notices easy to understand?

Base: All who have seen the bus diversion notices (76 post-wave only)

Q14b After seeing the bus diversion notices which of the following, if any, did you feel encouraged to do during the Prudential RideLondon events?

Base: All who have seen the bus diversion notices (76 post-wave only)

9

Diagnostics

Campaign specific

Empathy

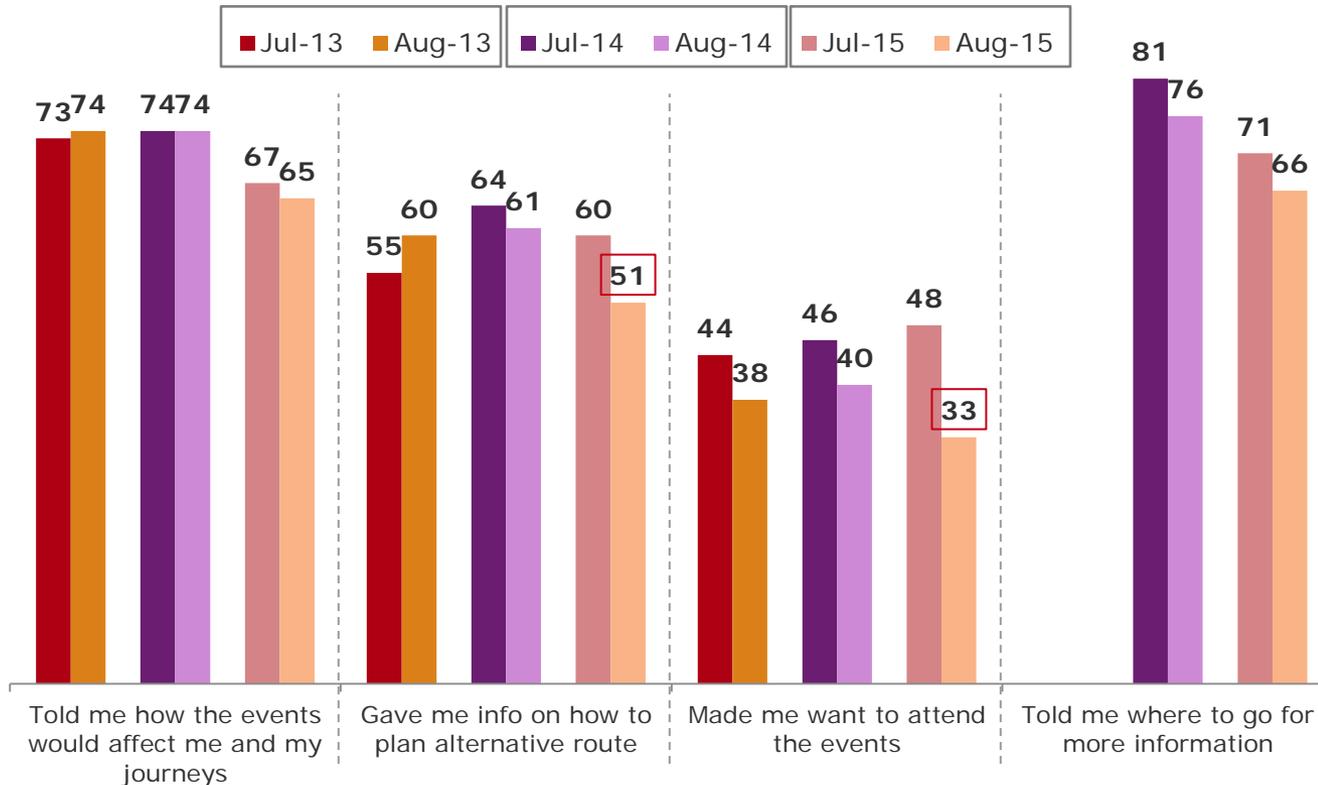
Reputation

Diagnostics – campaign specific

Among campaign recognisers, comparing July 2015 with July 2014, levels of agreement on 'gave me info on how to plan alternative route' were quite similar. However, there was less agreement on 'told me how the events would affect me / my journey' and 'told me where to go for more information'.

Campaign recognisers

Net: agree strongly/ agree slightly that **the ads**
%



Q18 Thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?
Base: campaign recognisers, Jul-15 (222), Aug-15 (288)

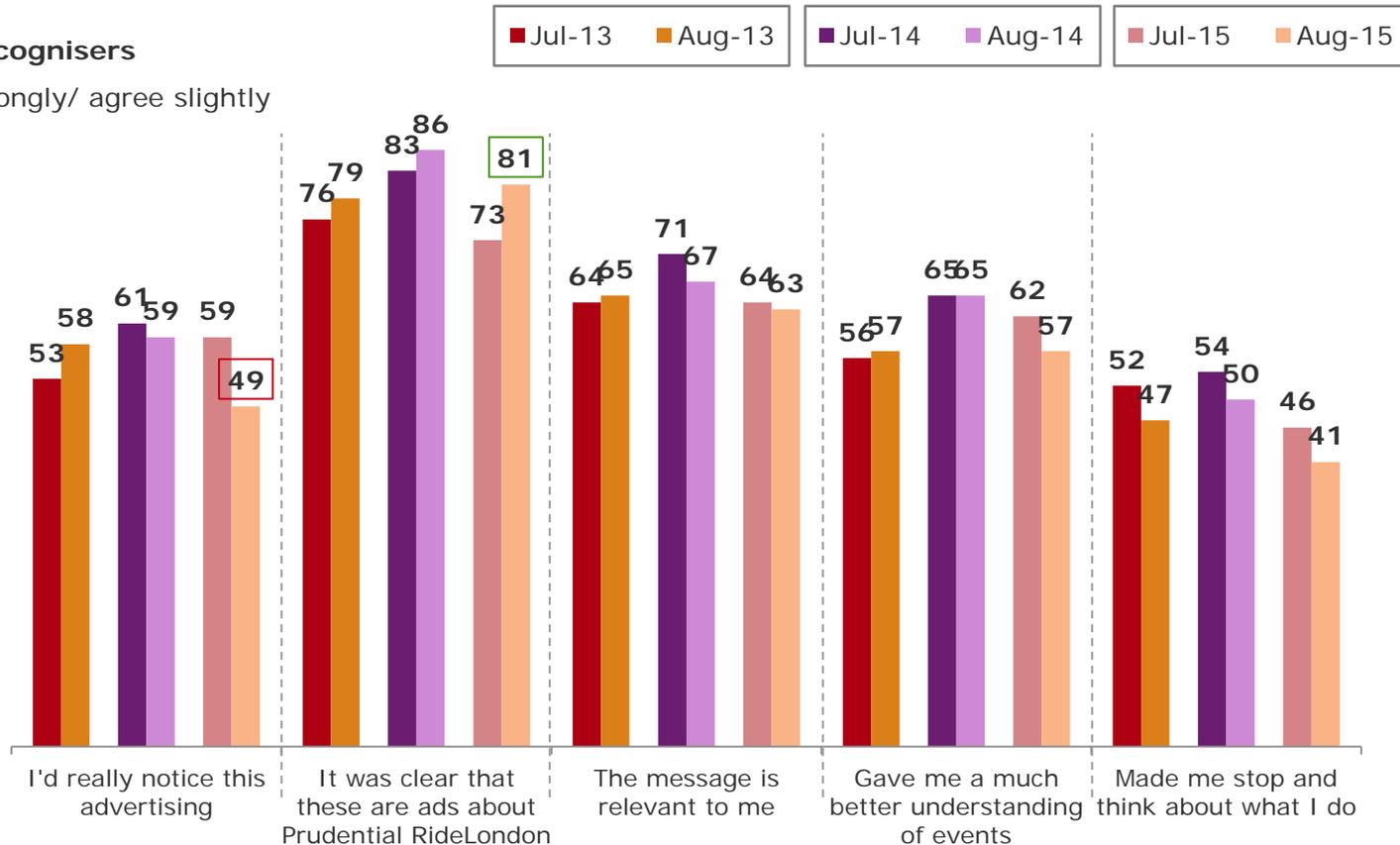
Significant increase/ decrease wave on wave

Diagnostics – Empathy (i)

Compared to July last year, there was less agreement among recognisers on 'clear the ads are about Prudential Ride London', 'the message is relevant to me' and 'made me stop and think what to do'. Noticeability and better understanding of events were however similar to last year.

Campaign recognisers

Net: agree strongly/ agree slightly
%



Q19 Thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?
Base: campaign recognisers, Jul-15 (222), Aug-15 (288)

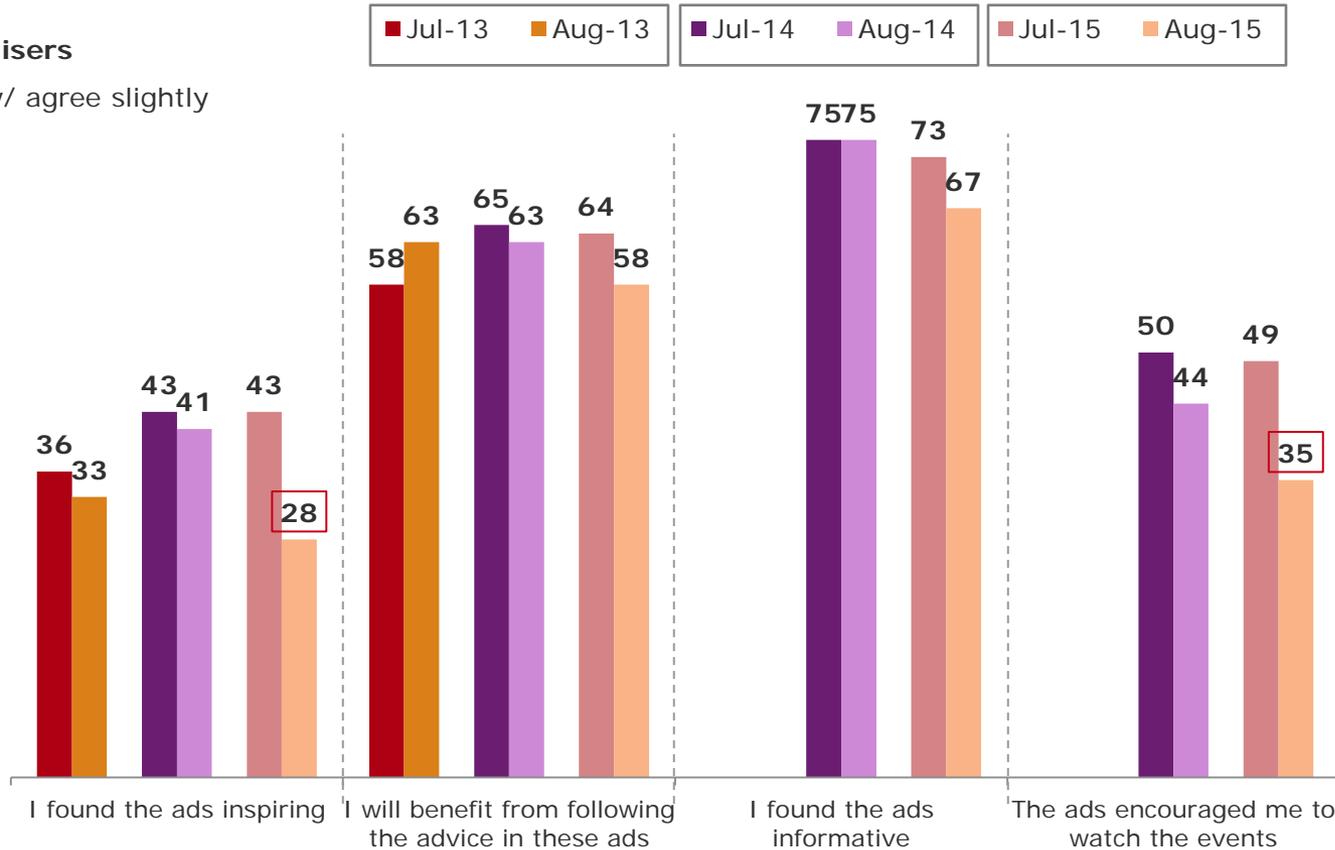
 Significant increase/
decrease wave on wave

Diagnostics – Empathy (ii)

Levels of agreement in July 2015 were similar to those seen last year.

Campaign recognisers

Net: agree strongly/ agree slightly
%



Q19 Thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?
Base: campaign recognisers, Jul-15 (222), Aug-15 (288)

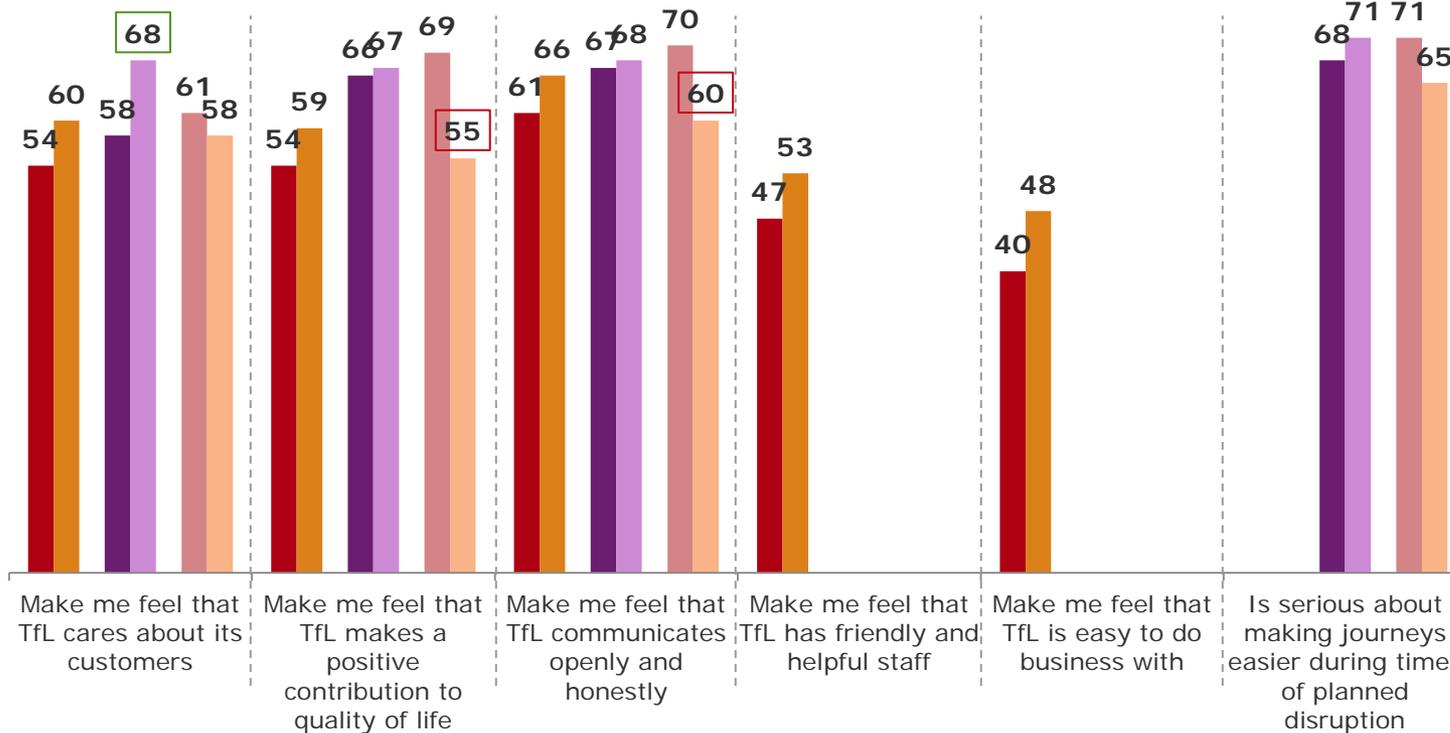
 Significant increase/
decrease wave on wave

Diagnostics – Reputation

Similarly levels of agreement here were similar in July 2015 to those seen at the same time last year.

Campaign recognisers

Net: agree strongly/ agree slightly
%



Q20 Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?
Base: campaign recognisers, Jul-15 (222), Aug-15 (288)

 Significant increase
 Significant decrease
 wave on wave

10

Methodology

Online interviewing using panel

Research timing:

Wave 1: 8th – 12th June 2015

Wave 2: 15th – 23rd July 2015

Wave 3: 3rd – 7th Aug 2015

Sample: online using panels

Base:

Wave 1: 501 residents of affected boroughs aged 16+

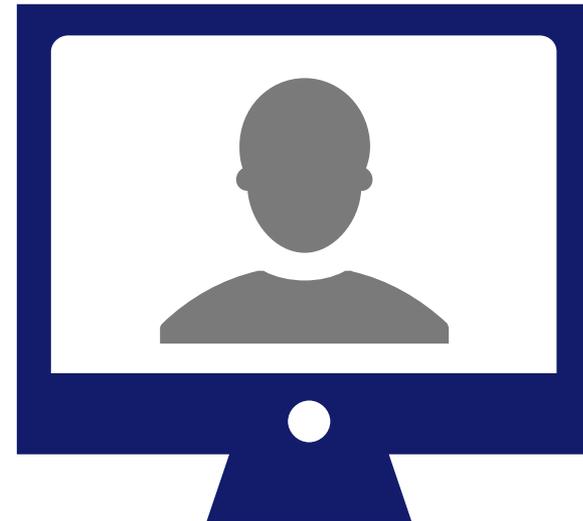
- 250 London residents
- 250 Surrey residents

Wave 2: 501 residents of affected boroughs aged 16+

- 250 London residents
- 249 Surrey residents

Wave 3: 500 residents of affected boroughs aged 16+

- 250 London residents
- 251 Surrey residents



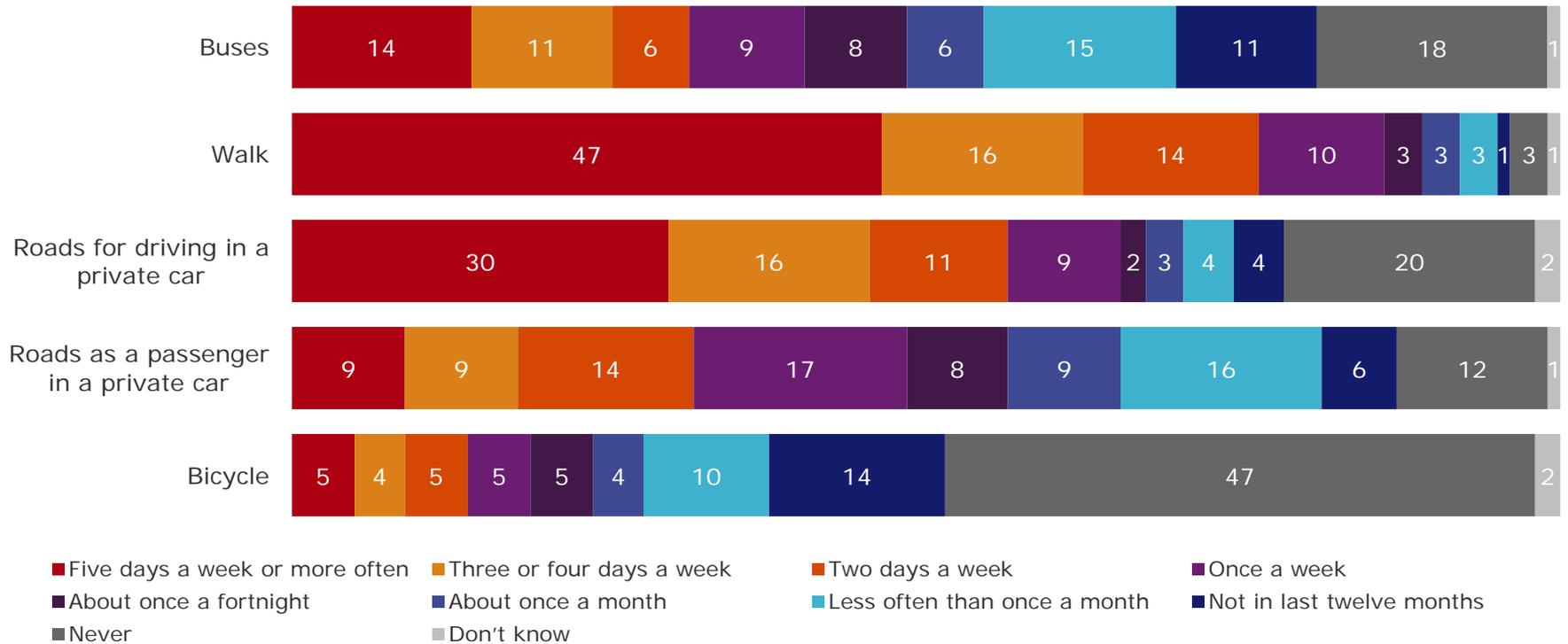
11

Appendix

Modes usage

Aug-15

%

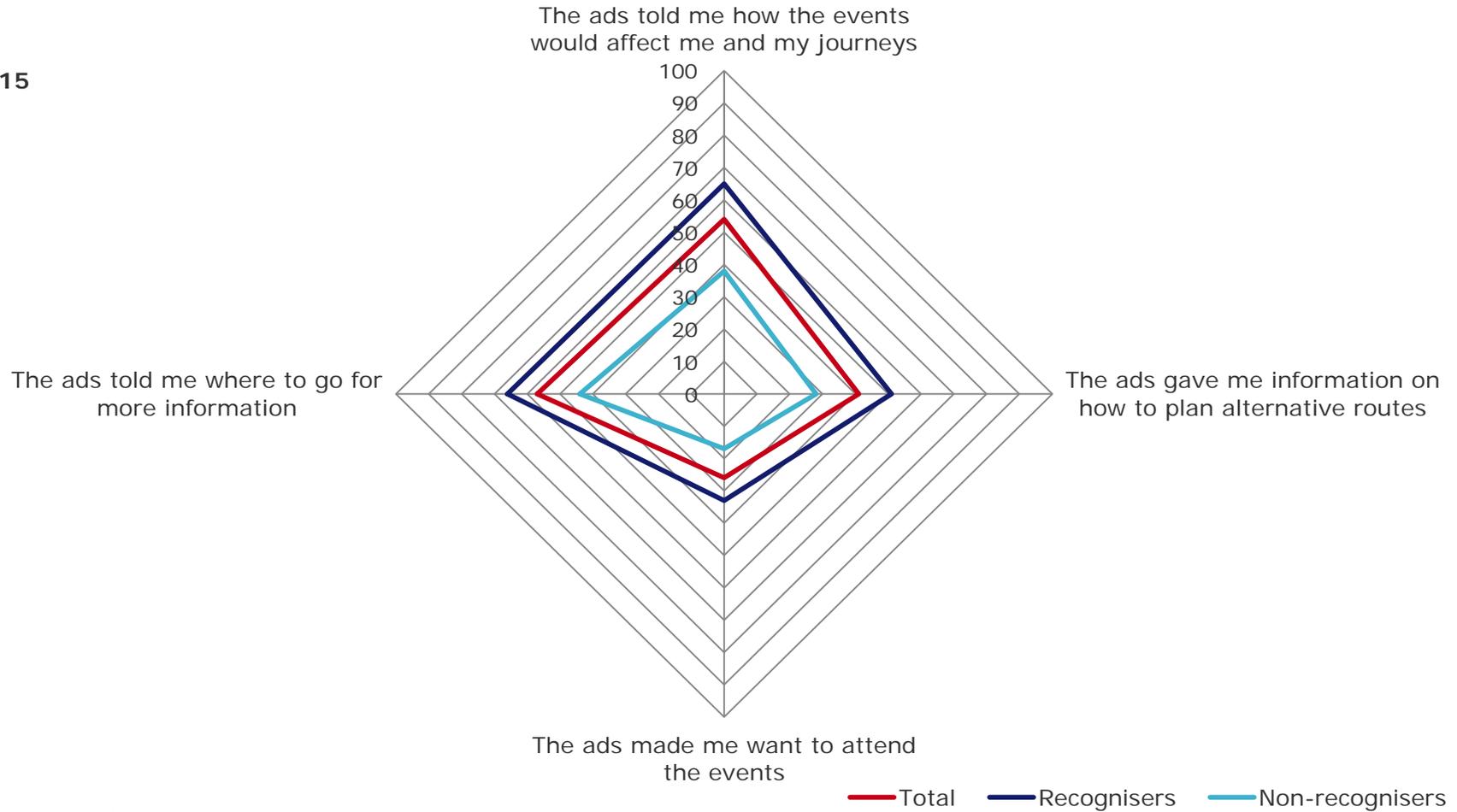


Q3. Typically, how often do you use each of the following modes of transport to get around your local area? wheelchair/ buggy space on buses in the past month?
 Base: total (residents of affected boroughs) (501 per wave)

Diagnostics - Campaign

Aug-15

%



Q18. Thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?

Base: total (residents of affected boroughs) (501 per wave)

Recognisers, Aug-15 (288)

Non-recognisers, Aug-15 (213)

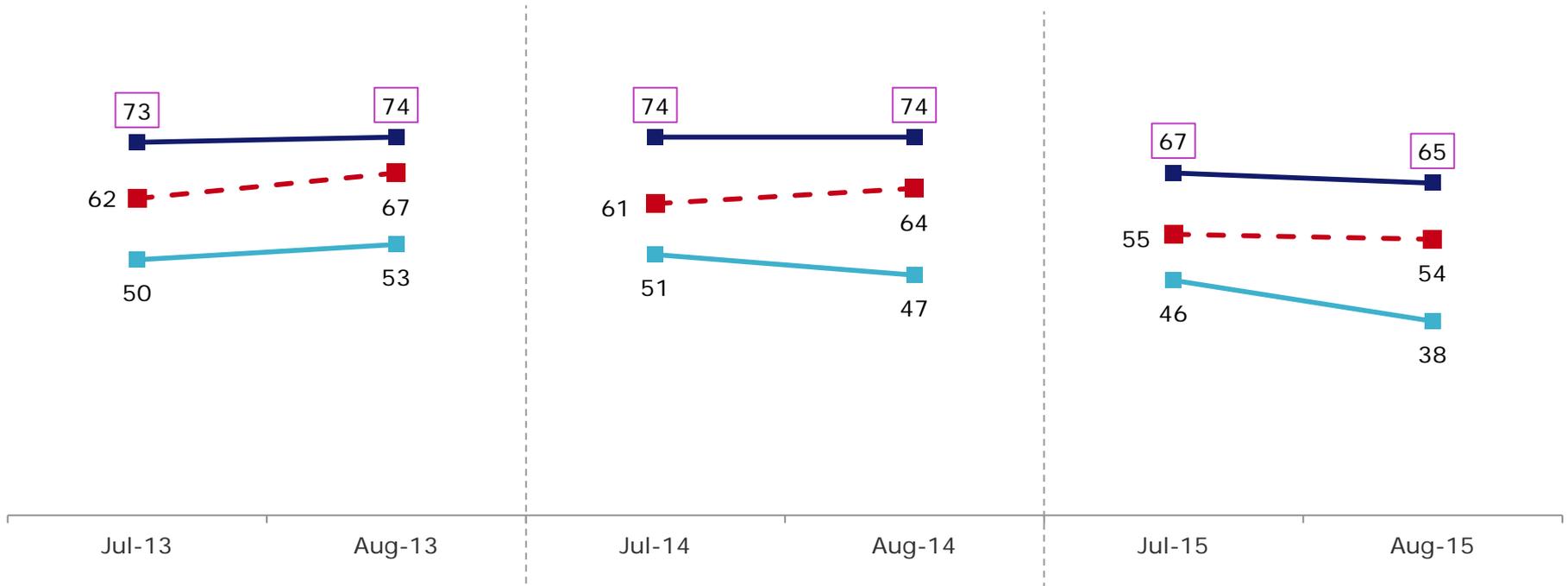


Diagnostics - Campaign

The ads told me how the events would affect me and my journeys

%

■ Total
 ■ Recognisers
 ■ Non-recognisers

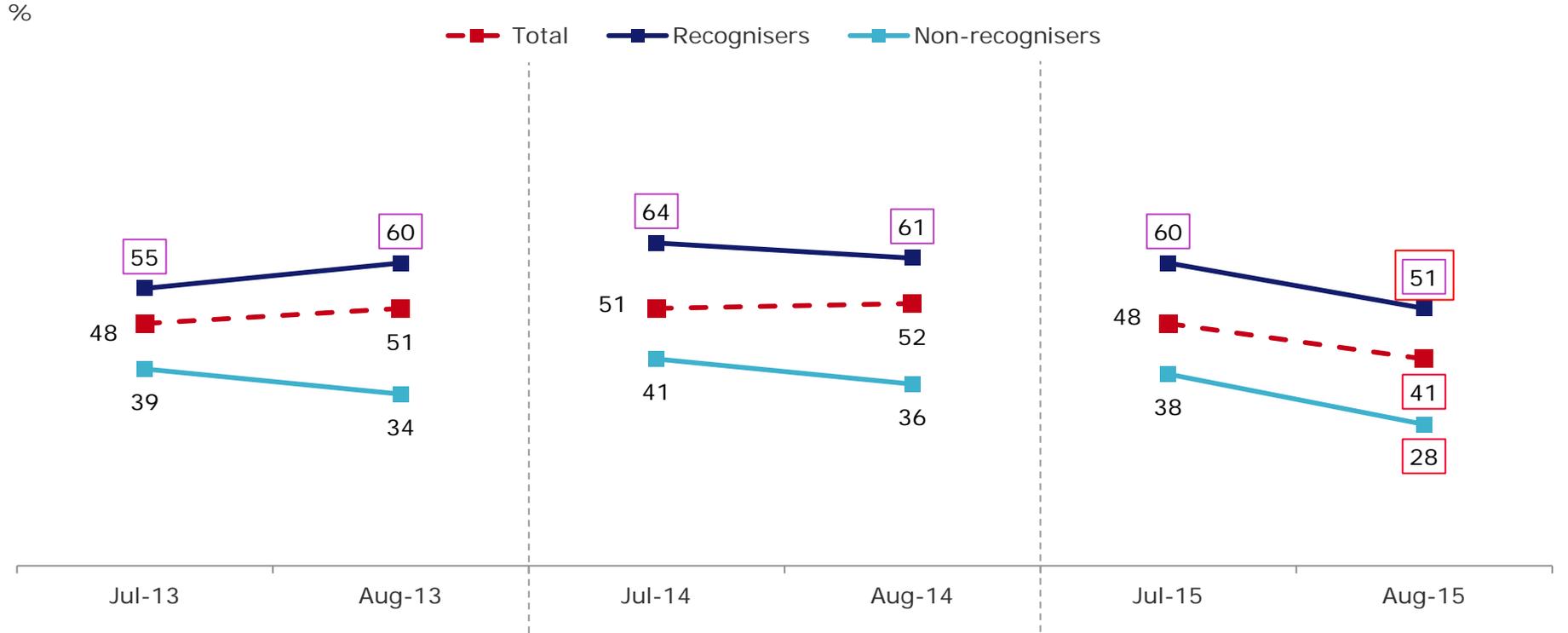


Significant difference between recognisers and non-recognisers

Q18. Thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?
 Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Diagnostics - Campaign

The ads gave me information on how to plan alternative routes



Q18. Thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?
 Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

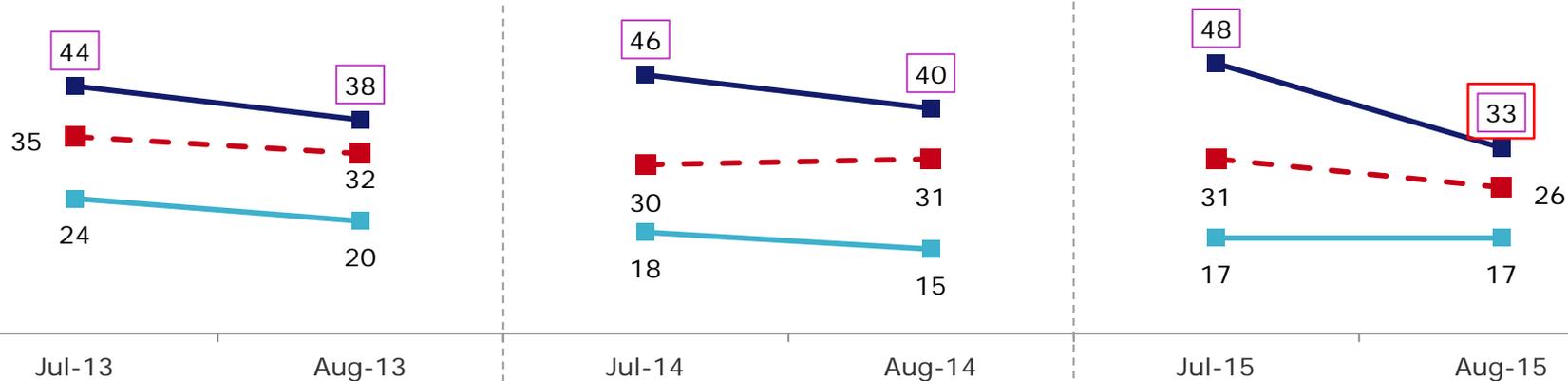
□ / □ Significant increase/decrease wave on wave

Diagnostics - Campaign

The ads made me want to attend the events

%

■ Total
 ■ Recognisers
 ■ Non-recognisers



Q18. Thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?

Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

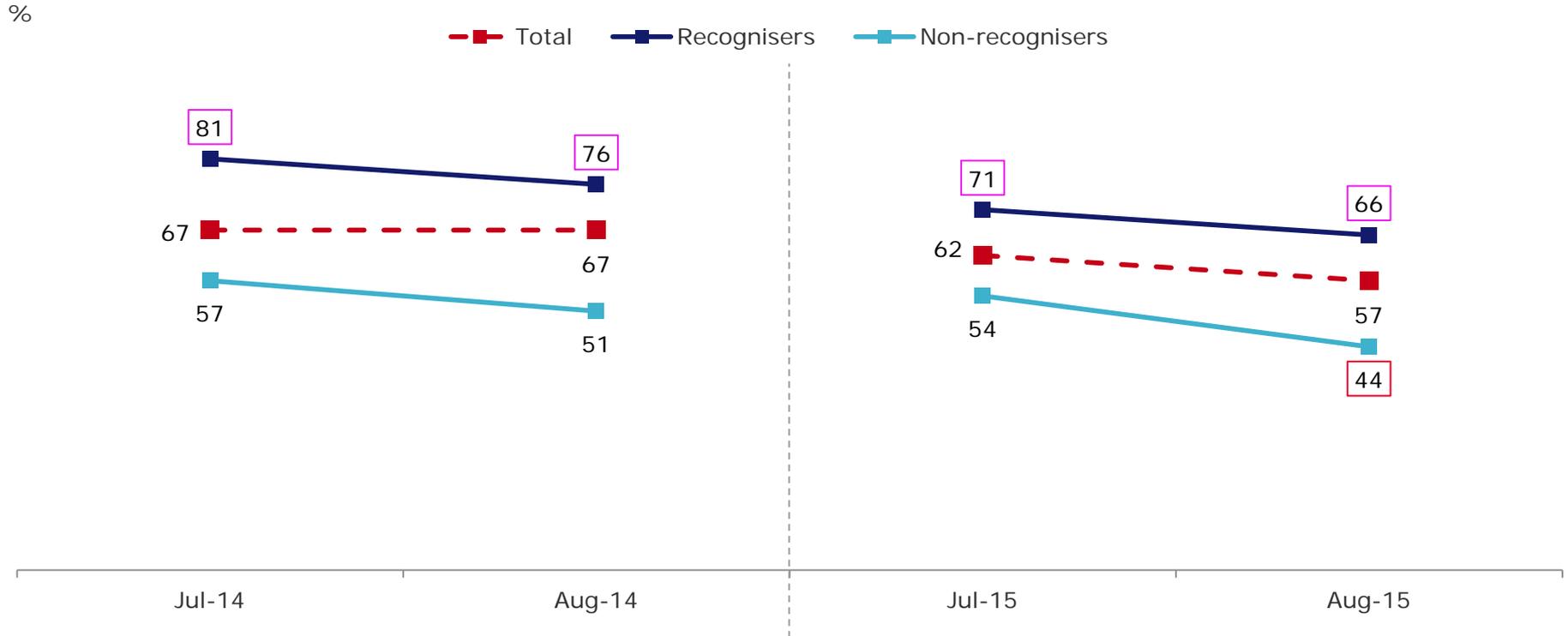
Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

 / Significant increase/decrease wave on wave

Diagnostics - Campaign

The ads told me where to go for more information



Q18. Thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?
 Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

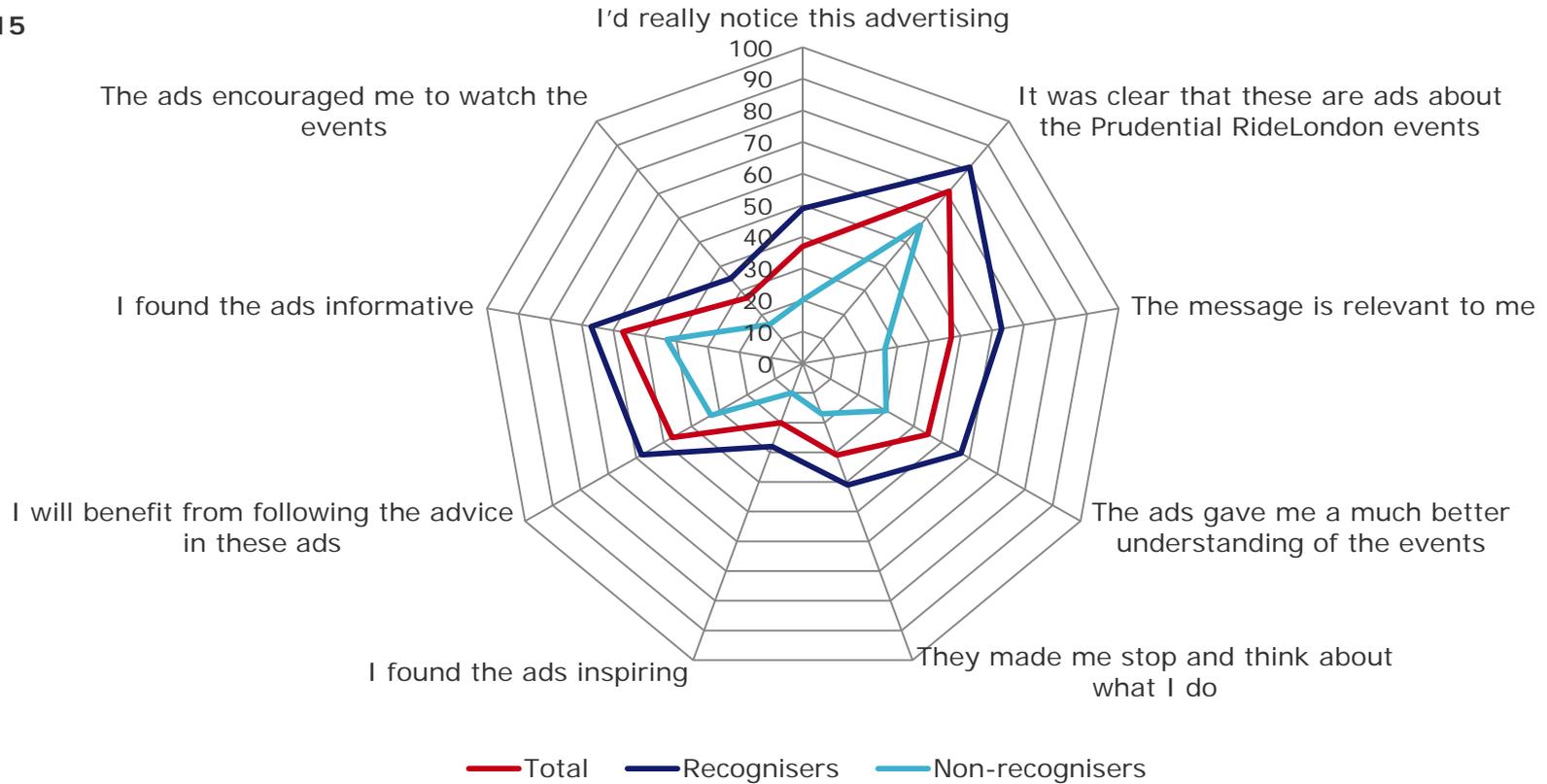
Significant difference between recognisers and non-recognisers

□ / □ Significant increase/decrease wave on wave

Diagnostics - Empathy

Aug-15

%



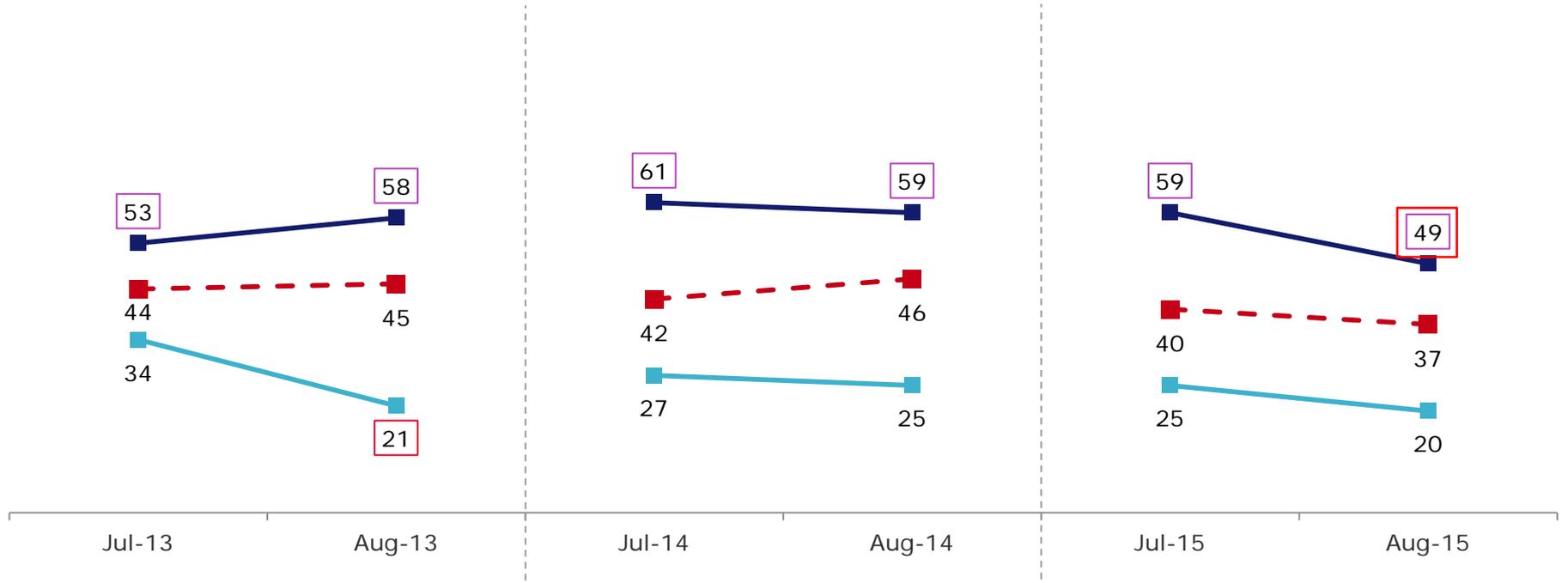
Q19. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?
 Base: total (residents of affected boroughs) (501per wave)
 Recognisers, Aug-15 (288)
 Non-recognisers, Aug-15 (213)

Diagnostics - Empathy

I'd really notice this advertising

%

■ Total
 ■ Recognisers
 ■ Non-recognisers



Significant difference between recognisers and non-recognisers

 / Significant increase/decrease wave on wave

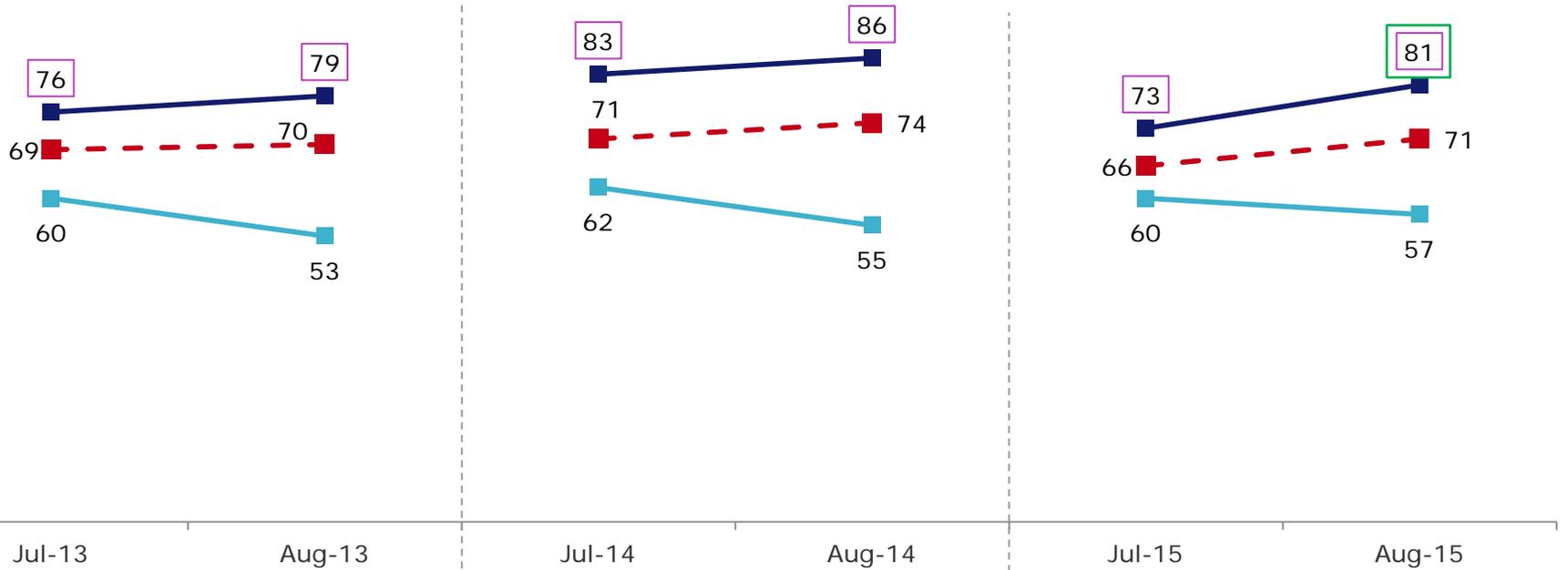
Q19. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements? Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Diagnostics - Empathy

It was clear that these are ads about the Prudential RideLondon events

%

—■ Total —■ Recognisers —■ Non-recognisers



Q19. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements? Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

□ / □ Significant increase/decrease wave on wave



Diagnostics - Empathy

The message is relevant to me

%

■ Total
 ■ Recognisers
 ■ Non-recognisers



Q19. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements? Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

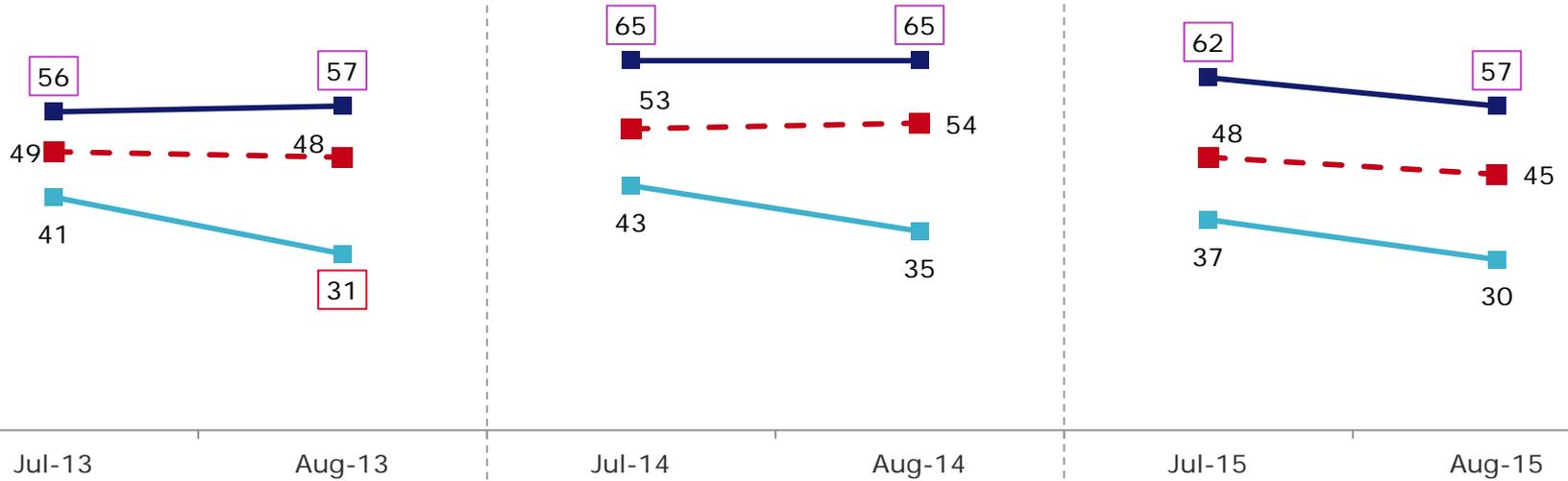
 / Significant increase/decrease wave on wave

Diagnostics - Empathy

The ads gave me a much better understanding of the events

%

■ Total
 ■ Recognisers
 ■ Non-recognisers



Significant difference between recognisers and non-recognisers

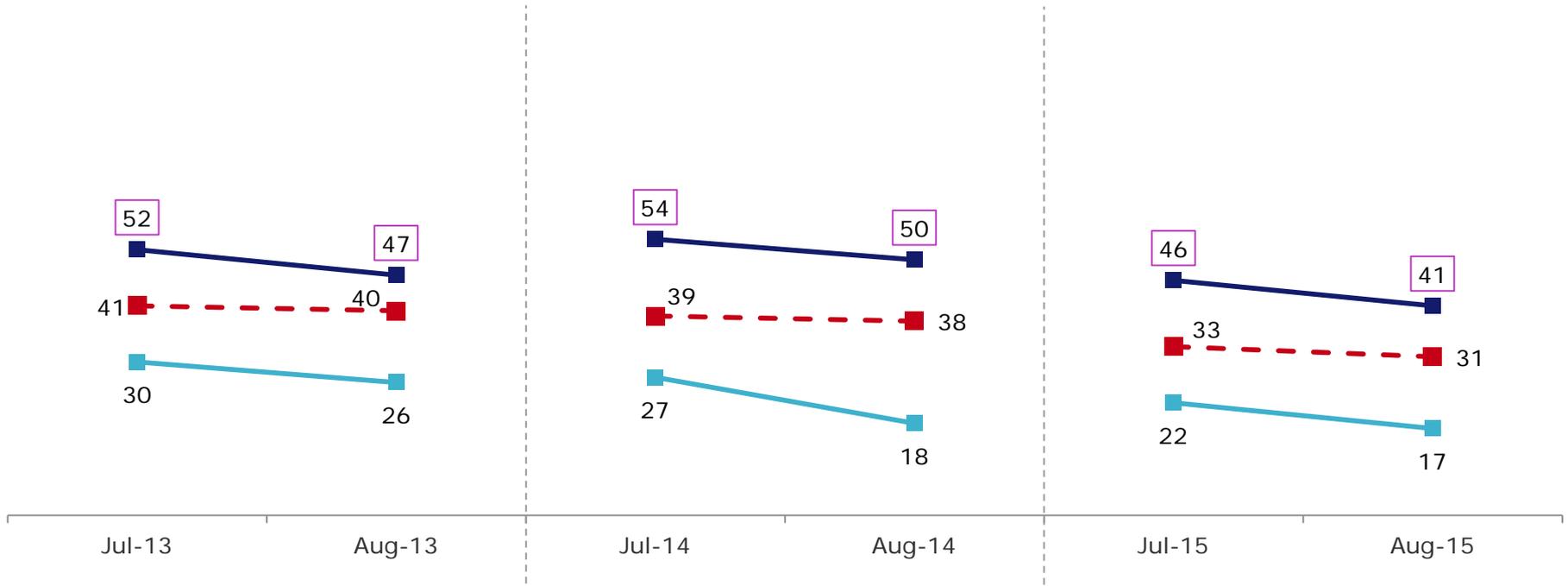
Q19. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements? Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Diagnostics - Empathy

They made me stop and think about what I do

%

■ Total
 ■ Recognisers
 ■ Non-recognisers



Significant difference between recognisers and non-recognisers

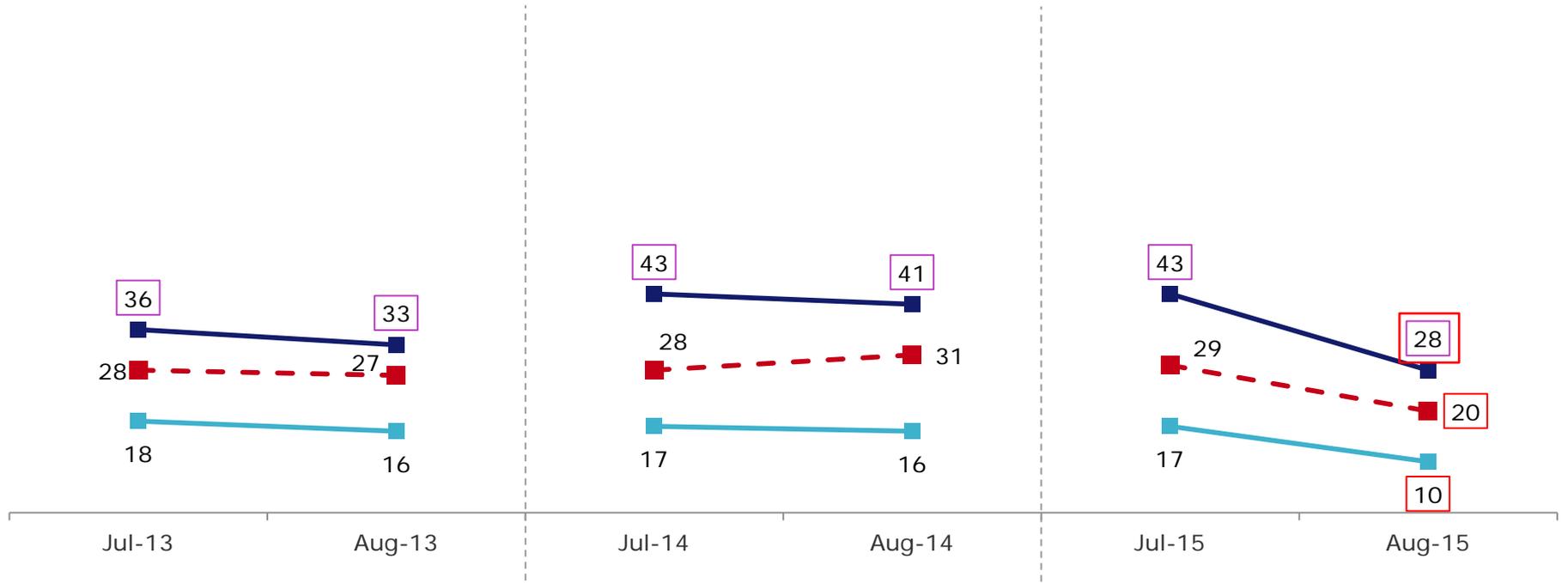
Q19. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements? Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Diagnostics - Empathy

I found the ads inspiring

%

-■- Total
 -■- Recognisers
 -■- Non-recognisers



Q19. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements? Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

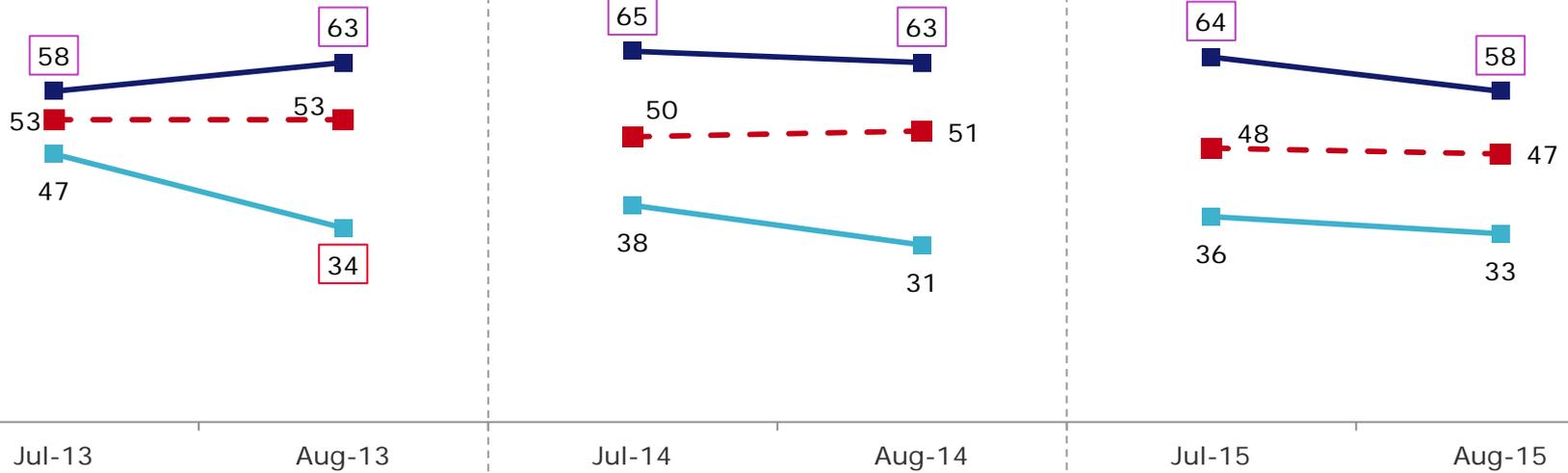
 / Significant increase/decrease wave on wave

Diagnostics - Empathy

I will benefit from following the advice in these ads

%

■ Total
 ■ Recognisers
 ■ Non-recognisers



Q19. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements? Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

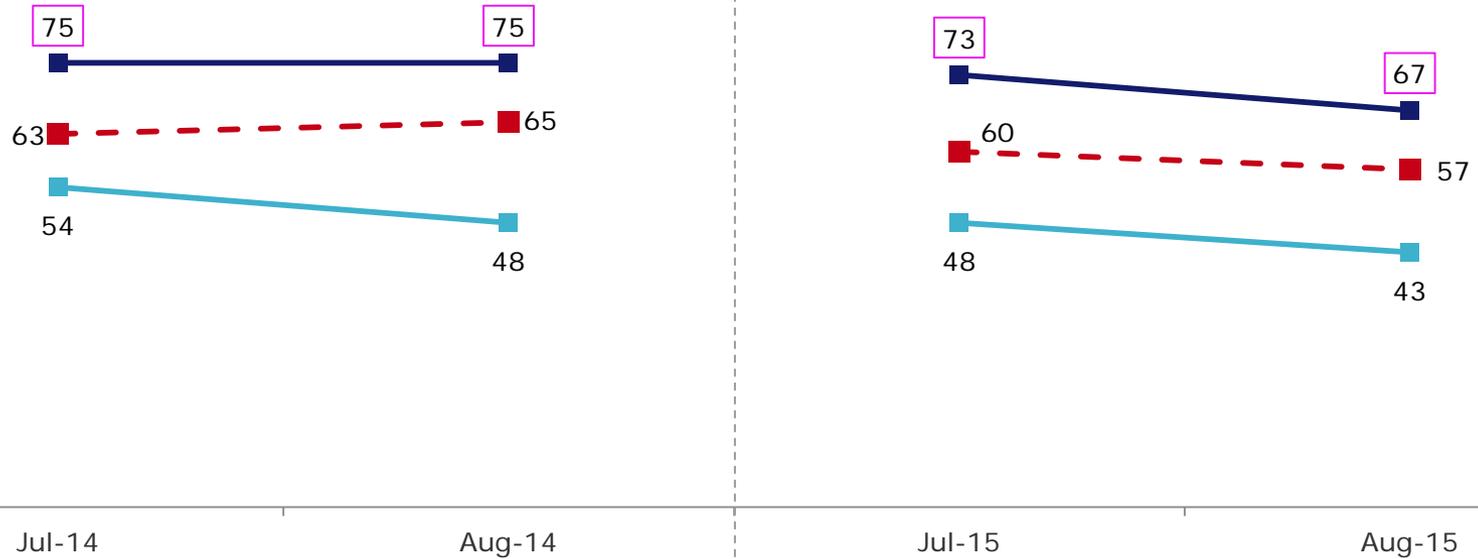
/
 Significant increase/decrease wave on wave

Diagnostics - Campaign

I found the ads informative

%

—■ Total —■ Recognisers —■ Non-recognisers



Q19. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements? Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
Recognisers, Jul-15 (222), Aug-15 (288)
Non-recognisers, Jul-15 (277), Aug-15 (213)

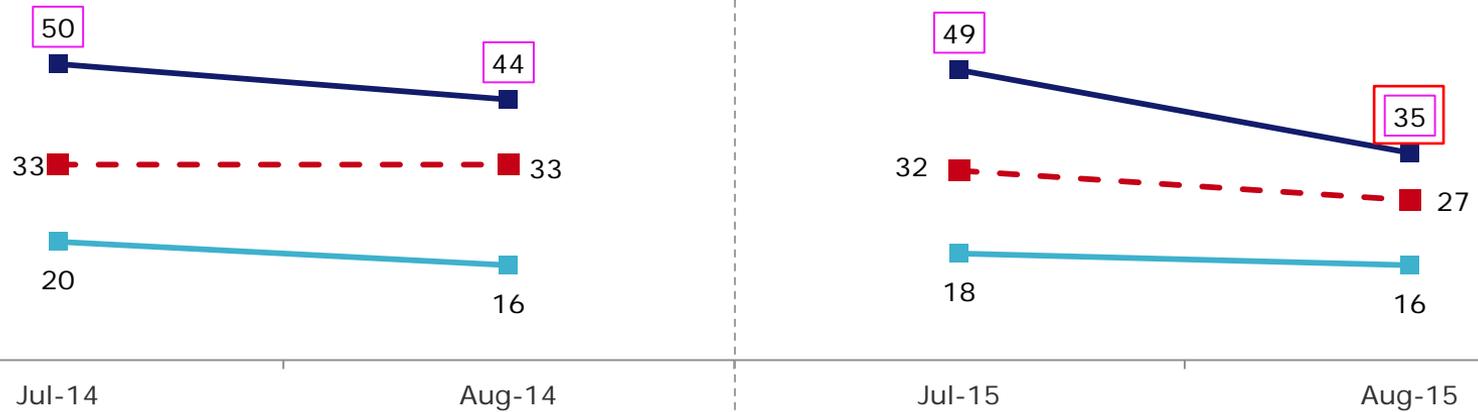
Significant difference between recognisers and non-recognisers

Diagnostics - Campaign

The ads encouraged me to watch the events

%

—■ Total —■ Recognisers —■ Non-recognisers



Q19. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements? Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)
 Recognisers, Jul-15 (222), Aug-15 (288)
 Non-recognisers, Jul-15 (277), Aug-15 (213)

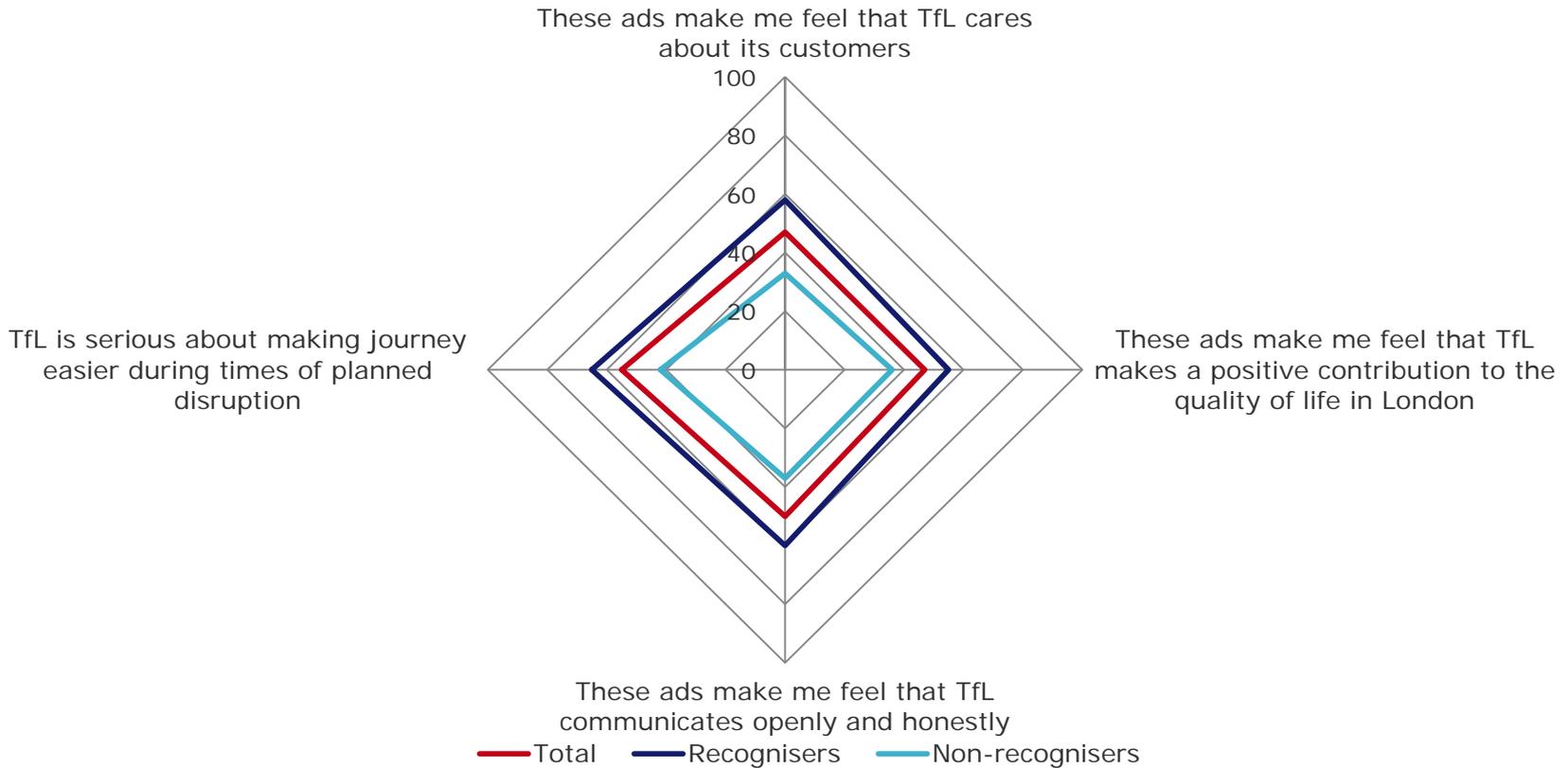
Significant difference between recognisers and non-recognisers

□ / □ Significant increase/decrease wave on wave

Diagnostics - Reputation impact

Aug-15

%



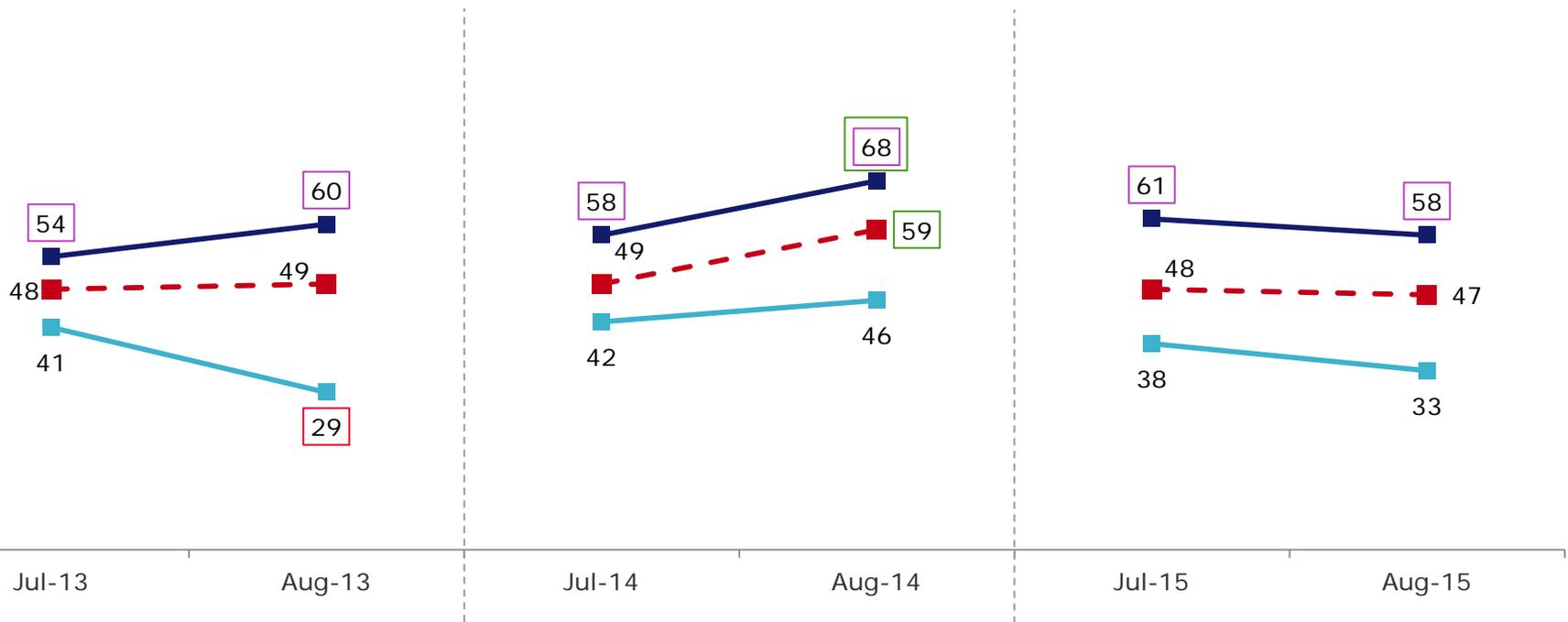
Q20. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?
 Base: total (residents of affected boroughs) (501 per wave)
 Recognisers: Aug-15 (288)
 Non-recognisers: Aug-15 (213)

Diagnostics - Reputation impact

These ads make me feel that TfL cares about its customers

%

■ Total
 ■ Recognisers
 ■ Non-recognisers



Q20. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?

Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

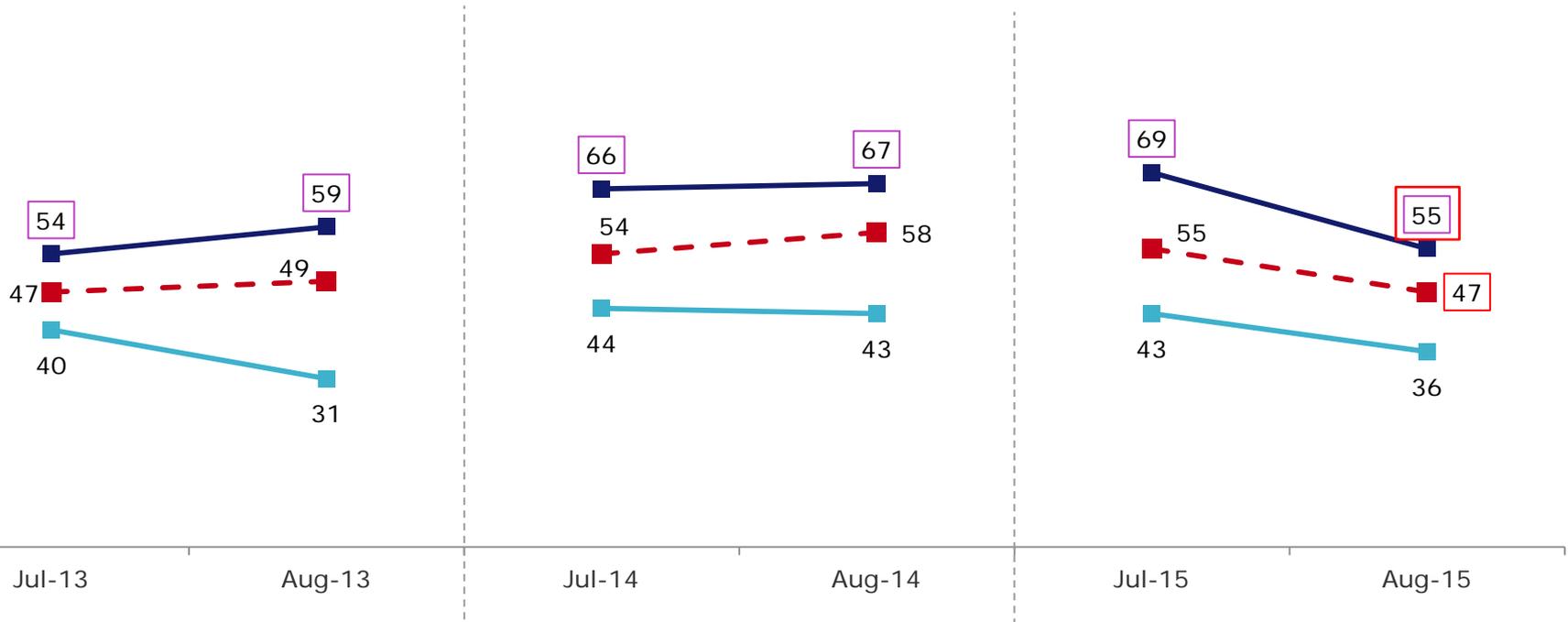
 / Significant increase/decrease wave on wave

Diagnostics - Reputation impact

These ads make me feel that TfL makes a positive contribution to the quality of life in London

%

-■- Total
 -■- Recognisers
 -■- Non-recognisers



Q20. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?

Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

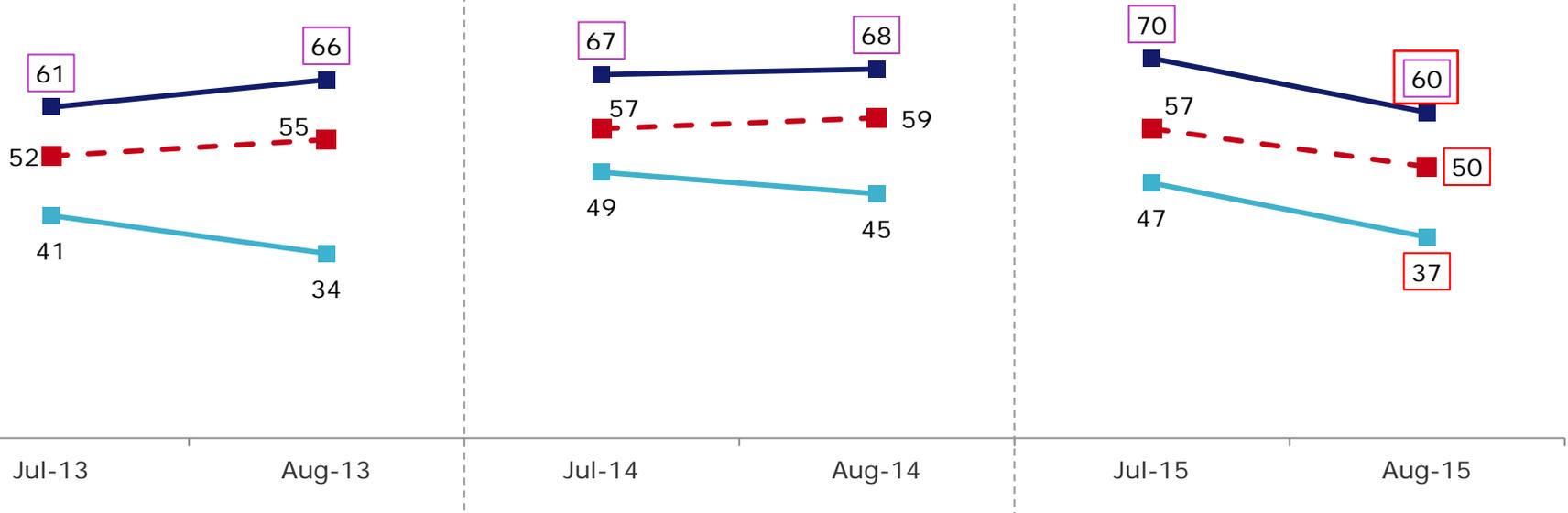
 / Significant increase/decrease wave on wave

Diagnostics - Reputation impact

These ads make me feel that TfL communicates openly and honestly

%

■ Total
 ■ Recognisers
 ■ Non-recognisers



Q20. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?

Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

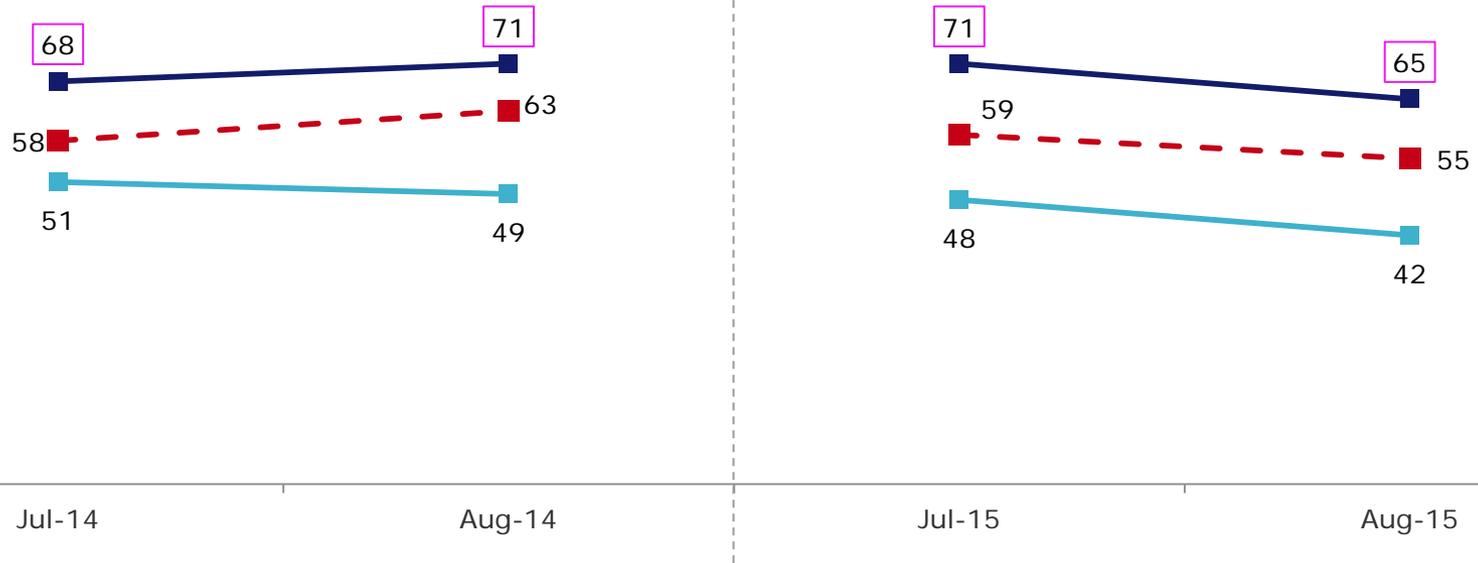
 / Significant increase/decrease wave on wave

Diagnostics - Reputation impact

TfL is serious about making journey easier during times of planned disruption

%

—■ Total —■ Recognisers —■ Non-recognisers



Q20. Again, thinking about the advertising you have just seen and heard, to what extent do you agree or disagree with the following statements?

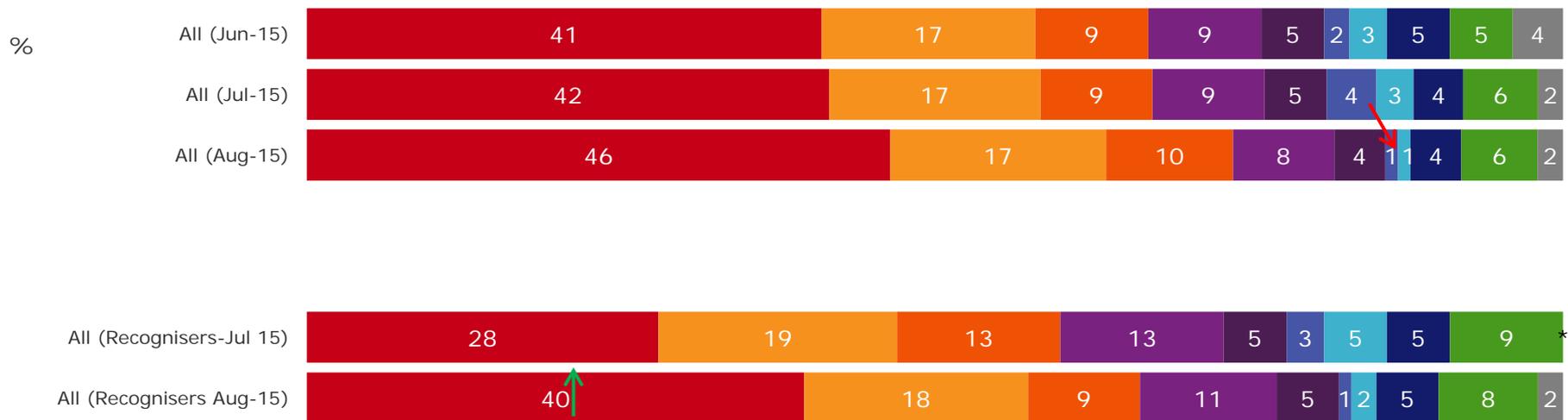
Base: total (residents of affected boroughs) Jul-15 (499), Aug-15 (501)

Recognisers, Jul-15 (222), Aug-15 (288)

Non-recognisers, Jul-15 (277), Aug-15 (213)

Significant difference between recognisers and non-recognisers

Propensity to cycle



- I have never thought about it but would be unlikely to start in the future
- I have never thought of starting but could be open to it
- I have decided to start soon
- I have started recently and am finding it quite easy so far
- I started a while ago and am still doing it regularly

- I have thought about it but don't intend starting in future
- I am thinking about starting soon
- I have started recently but am finding it difficult so far
- I started a while ago and am still doing it occasionally
- I had started doing this but couldn't stick to it

→ Significant increase/decrease
→ wave on wave

Q26a. Which of the following would you say applies to you.....? - When thinking about increasing the amount I cycle in London...
 Not asked in the prewave
 Base: All Londoners: Jun-15 (500), Jul-15 (499), Aug-15 (501)
 Recognisers: Jul-15 (222), Aug-15 (288)