

The Tour de France The Grand Depart 2007 Research Summary



REPORT to Transport for London

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EXECUTIVE SUMMARY

This report for Transport for London (TfL) summarises a broad selection of previously commissioned research on the impact of the recent UK Stage One of the Tour de France (TdF), and related activities, which took place in early July in London and Kent.

TfL objectives were:

- to promote cycling in the capital;
- to market London on a world stage and encourage tourism;
- to demonstrate London can bid for and win major sporting events.

The Mayor's objectives included 'making London a city where people of all ages and abilities have the incentive, confidence and facilities to cycle whenever it suits them'.

Overall Satisfaction

Key messages were that a world-class event requires a world-class host, and London scored very well as a host city for major events.

The overall programme generated extensive media coverage in the eighteen month period leading up to the event. Evaluation indicated highly favourable attitudes towards London as the host of both the TdF and the 2012 Olympics.

Eight out of ten people interviewed said the TdF was the main reason for their being out. A survey of satisfaction with the Tour de France and related events produced very high scores for the TdF as a spectacle, the quality of stewarding, the information available, and facilities for the public.

The People's Village and the Cycling Festival (a free celebration in Hyde Park of cycling in London) also produced high satisfaction levels including strong appeal for people of all ages and for entertainment value.

Commercial Impact

The TdF directly generated £73 million in London, £15 million in Kent and a further estimated £35 million from publicity. In addition there were many other related events held by local authorities and other organisations which cumulatively generated substantial additional activities and spending.

Attendance

Estimated attendance was around three million or more in London and Kent. The picture overall is of people treating the TdF and associated events as family and social occasion. More than half came from outside London, and ten per cent came from overseas.

In London, most people travelled to the events by public transport. One in eight in London and around a third in Kent came on foot. Travel by bike was two to three times the normal rate for London.

Knowledge of the TdF

Overall, there is clear evidence of TfL's success in developing and then maintaining a high profile for the TdF in London and the South East. People were also aware that TfL was instrumental in bringing the event to London, and approved of this initiative.

Studies of awareness about the TdF showed that knowledge of the event increased substantially in the run up period, while perceptions of the impact of the TdF on London and the UK continued at a high and positive level throughout the survey period.

Most people found out about the TdF through television, followed by press coverage. Knowledge of the TdF as a major sporting event ranked fourth, behind the FA Cup, Wimbledon and the Ashes, and ahead of Six Nations Rugby.

Cycling behaviour and impact on attitudes

Surveys results indicated that just over half of those attending said they were more likely to cycle as a result of the TdF in particular for leisure.

The Go-Ride 'Come and Try It' sessions, organised by British Cycling (BC) were very successful both in London and Kent in attracting young people with little or no experience of cycling.

Overall, one fifth of cyclists interviewed at the Festival said they already cycled more than in 2006 and 11% had taken up cycling since then. Those most likely to cycle more included younger women, people aged 16-34 and those in social classes ABC1.

Cycling Clubs across the UK were reporting a greater interest in joining.

Summary Profile of Attendees at TdF Events: Mode of Travel and Cycling Intentions

Event	Profile	Cycle to Event?	Will they cycle more?
TdF	Typical cyclists Kent – more average	8% in London	2 in 5 said yes (for London Saturday event 1 in 2)
Festival	Typical cyclists	31%	More women than men said yes
Go-Ride	Young people (events aimed at encouraging young people)	not known	3 in 5 interested in joining a Go-Ride club
London Cycling Campaign (LCC) organised ride to Prologue	Two thirds were women	100%	7 in 10 said yes
London average	13% of Londoners use cycles –	n/a	A third of Londoners said they would consider it mostly for leisure

The wider context

Cycling levels in London have continued to rise substantially in recent years; 83% overall since 2000 with the latest figures showing a 10.5% increase in cycling on TLRN relative to the previous annual period.

TfL's annual monitoring survey of cycling behaviour and attitudes (undertaken in April 2007) indicates that over one third of Londoners have access to a bicycle and of these, two out of five use it to some extent. Most cycling is for leisure. The main reasons given for cycling are: to 'get fit' (just over a quarter); to save money and to save time (about one in ten each).

About one-third of Londoners overall said they would consider cycling more. Again this represents a significant increase in 2007 compared to 2006, suggesting Londoners are becoming more open to the idea of cycling. The most popular modes to be replaced by more cycling are bus (44%) and car (one third) - which might have beneficial effects on congestion. Around one in five would replace tube journeys and one in ten would replace rail journeys.

Walking is by far the most preferred mode of transport overall in London where this is possible, favoured by eight out of ten respondents to the monitoring survey. Cycling and the tube are less popular (rated as popular by two in five). This picture has changed little since 2005. Among children, however, cycling, together with walking is the preferred mode.

Reasons why people do not cycle more include "traffic makes people afraid of cycling in London" (one in eight of all Londoners).

Conclusions

In terms of the economic gains, numbers attending and positive media coverage, the TdF was an extremely successful UK event. The partners' objectives appear to have been fully met; the TdF established London as a premier event location, and the direct economic impact on both Central London and the region surrounding the route is emerging as extremely positive.

The organisation of the TdF in London, and the related events was judged to be extremely good, with very little criticism of any aspect and few suggestions for possible improvements in the future. Overall the TdF event fully met the objectives of TfL.

The Tour de France Grand Depart 2007 Research Summary

1. INTRODUCTION

This report for Transport for London (TfL) summarises a broad selection of previously commissioned research which relates to the impact of the recent Tour de France Grand Depart (TdF) on London in early July 2007.

Social Research Associates (SRA) was commissioned in August 2007:

- To collate the research and monitoring information on the Tour de France on London; and
- To analyse and present it in a concise format for selected audiences.

The report includes summaries of surveys of views of attendees at the various events, economic impacts, and attitudes to the decision to host the Tour de France in London.

1.1 Summary of the Main Events

Tour de France		
Date	Event	Venue
4 th , 5 th , 6 th July	Permanence	ExCeL
Friday 6 th July	Opening Ceremony	Trafalgar Square
Saturday 7 th July	Prologue	Circular route around Westminster, including Hyde Park, Green Park and St James's Park.
Sunday 8 th July	Grand Depart Stage One	Competitors leave Westminster, ride through London and continuing south eastwards towards Canterbury, Kent.
Related Events		
Friday 6 th – Sunday 8 th July	People's Village	A free event in Hyde Park, celebrating cycling in London with a variety of informative exhibits, displays and entertainment related to French and British culture.
Friday 6 th July – Sunday 8 th July	Go-Ride (at People's Village and elsewhere)	Seven events across London boroughs organised by British Cycling (including Hyde Park). In addition other events were held outside London – in total 29 clubs registered events aimed at engaging more people in cycling.
Sunday 8 th July	The Cycling Festival	An event with eight main competitions, also held in Hyde Park.
Saturday 7 th July	LCC Rides to the Prologue	
Friday 6 th July – Sunday 8 th July	Go-Ride clubs throughout UK outside London	29 clubs held registered events as part of the overall programme.
Spread throughout previous six month period as well as during the event	Borough and other organisations' events	A wider range of cycle related events and publicity. See Appendix 2 for full details.

1.2 Objectives of TfL

TfL's objectives were:

- to promote cycling in the capital;
- to market London on a world stage and encourage tourism;
- to demonstrate London can bid for and win major sporting events.

1.3 Objectives of other Funding Bodies

Primary partners included the London Development Agency (LDA), South East Development Agency (SEEDA) as well as UK Sport, Sport England, British Cycling, Kent County Council, Medway Unitary Authority, Canterbury City Council, Mayor of London, Visit London and Royal Parks. Both the LDA and SEEDA supported the programme for important economic development reasons, including regeneration, support for business and employment creation. LDA was also very concerned that this event should be part of the marketing and promotion of London 'as a vibrant place to live, study, visit and do business'.

The Mayor's objectives included 'making London a city where people of all ages and abilities have the incentive, confidence and facilities to cycle whenever it suits them'.



Sources

Prior to the TdF, TfL commissioned a series of research studies to monitor its impact on London, from a range of perspectives. The series began with a public awareness survey, commissioned by TfL and carried out in June 2006, immediately before the 2006 Tour de France, and repeated in January 2007 and again in May 2007. The full list of studies and reports is listed below and expanded at Appendix 1 together with additional data sources.

Table 1: Evaluation Studies Included in this Report

Short Title & Reference	Source/Author	Content	Numbers surveyed/ Participants
1. British Cycling Post Event Summary	British Cycling	Summary of main events	2025 young people participated
2. TdF Event Satisfaction	Synovate	Profile and satisfaction study of the TdF events	870 face to face interviews: 560 London over weekend; 310 in Kent Stage One only
3. Cycling Festival Evaluation	Synovate	Profile and satisfaction study of the Cycling Festival	135 face to face interviews
4a. TdF Grand Depart (1) Aug 2006	Synovate	Part 1 of a multi-part Awareness Study of the TdF coming to London	876 telephone interviews with London and Kent residents June 2006
4b. TdF Grand Depart (2) Feb 2007	Synovate	Part 2 of the Awareness Study	1638 telephone interviews: 837 with London and Kent residents; 801 in Manchester, Leeds, B'ham and Cambridge Jan 2007
4c. TdF Grand Depart (3) June 2007	Synovate	Part 3 of the Awareness Study	874 telephone interviews with London and Kent residents May 2007
5. British Cycling Go-Ride Review	British Cycling	Review of coaching opportunities in primary and secondary schools and clubs	1248 young people involved 2006/7
6. July London Omnibus Summary	TfL	Survey of sample of inner/outer London Residents with views of TdF + management of London's Streets	1003 telephone interviews: weighted sample
7. TfL Omnibus – Attitudes to Cycling Mar 2007	Synovate	Survey of attitudes to cycling among adults and children in London	1208 telephone interviews. Extended part of TfL regular fieldwork.
8. June London Omnibus topline Results	Mori for TfL	Awareness of TfL	1000 telephone interviews July 2007
9. TdF Economic impact	Sports Industry Research Centre, Sheffield Hallam University	Economic importance of the event	3960 face to face interviews: 2636 face to face interviews in London over 3 days with stakeholders and spectators; 1324 face to face interviews Kent Stage One – spectators only.
10. Media Assessment	Carma	Media evaluation – assessment and value of media coverage – press, radio, TV	6000 pieces of news analysed from total of 20,000 generated (1 st Jan 2006 – 31 st August 2007).
11. Case Study of Deptford	Research by Dr Andrew Smith, University of Westminster	Case study based on Deptford of benefits to peripheral urban areas	Interviews with key stakeholders Desk top research including review of media materials.
14. TfL Cycling for Sport Study 3 rd Wave	Synovate	Repeat interviews with Cycling Club Secretaries	Telephone interviews with 61 Cycling Club secretaries Aug/Sept 2007.
15. TLRN Cycling Data Periods 1-6	TfL	Periodic counts of cycling flows	
A. Funder Objectives	TfL	Objectives for LDA; SEEDA, UK Sport; Mayoral Objectives	
B. Equality Impact Objectives & form	TfL		

2. METHODOLOGY

This document has been prepared as an interpretative report suitable for presentation to a stakeholder audience and the media. The Executive Summary consists of both a general summary and a set of individual sheets of particular interest to each of the main partners.

The material analysed and shown above in Table 1, consists of three main types:

- surveys of the public specially commissioned in connexion with the TdF and related activities;
- regular ongoing surveys conducted to provide monitoring information on public attitudes and behaviour, especially in relation to cycling;
- reports submitted by other interested parties such as British Cycling (BC).

The methods used for each of these differ widely, as do the sample sizes, and the time-span over which they were conducted. Detailed correlations between data drawn from different surveys might therefore be potentially misleading. Nevertheless, where possible, reasoned inferences have been made from what the different surveys and reports can tell us about the impact of the TdF. The emphasis has been on identifying key messages for the partners, including some which may require further investigation or confirmation at a later stage.



3. DATA SUMMARY

This chapter provides a summary of the factual information from the sources listed in Table 1. Evaluations of the event are reported in Chapters 4 and 5. The data summarised relates to the Tour de France itself and the associated events.

3.1 Who knew about the Tour de France?

Overall, there is clear evidence of TfL's success in developing and then maintaining a high profile for the TdF in London and the South East.

The findings are drawn from the three Awareness Studies. These studies were carried out in advance of the event to gauge people's developing knowledge of the event, and how they were finding out about it. The research was based on a sample of over 800 respondents, in three 'waves' or stages. The main research was telephone interviews in London and Kent, and there was also a telephone survey of event awareness in Cambridge, Manchester, Leeds and Birmingham.

- | | |
|-----------------|---------------|
| 1. June 2006 | Wave 1 |
| 2. January 2007 | Wave 2 |
| 3. May 2007 | Wave 3 |

Key findings were:

- Event Awareness improved during the study period, from three in a hundred of respondents in London at the outset to one in ten by May 2007 spontaneously able to mention the TdF as a sporting event. For the Kent towns on the route of the TdF, the figures showed a more pronounced increase, from nine in a hundred in wave 1, to over a quarter by wave 3.
- After prompting by the interviewer, these figures improved to two thirds in London and almost nine out ten in the Kent towns in wave 3.
- Knowledge of the forthcoming event was strongest among those aged over 35, in social classes ABC1 and among white people (especially cyclists).
- Television was the most frequently cited way in which people found out about the TdF (almost a third in wave 3), followed by press (one quarter in wave 3).
- Perceptions of the impact of the TdF on London and the UK continued at a high, positive level through the survey period. Eight out of ten respondents in London and even more in Kent thought the TdF would impact positively on London and surrounding area.
- Knowledge of the TdF as a major sporting event ranked fourth, behind the FA cup, Wimbledon, and the Ashes, and ahead of Six Nations Rugby.

These figures compare with the more than half of Londoners who were aware that TfL had brought the TdF to London, while about the same number across London and Kent also felt that the venture fitted very well with TfL's role.

3.2 Who Attended the Tour de France?

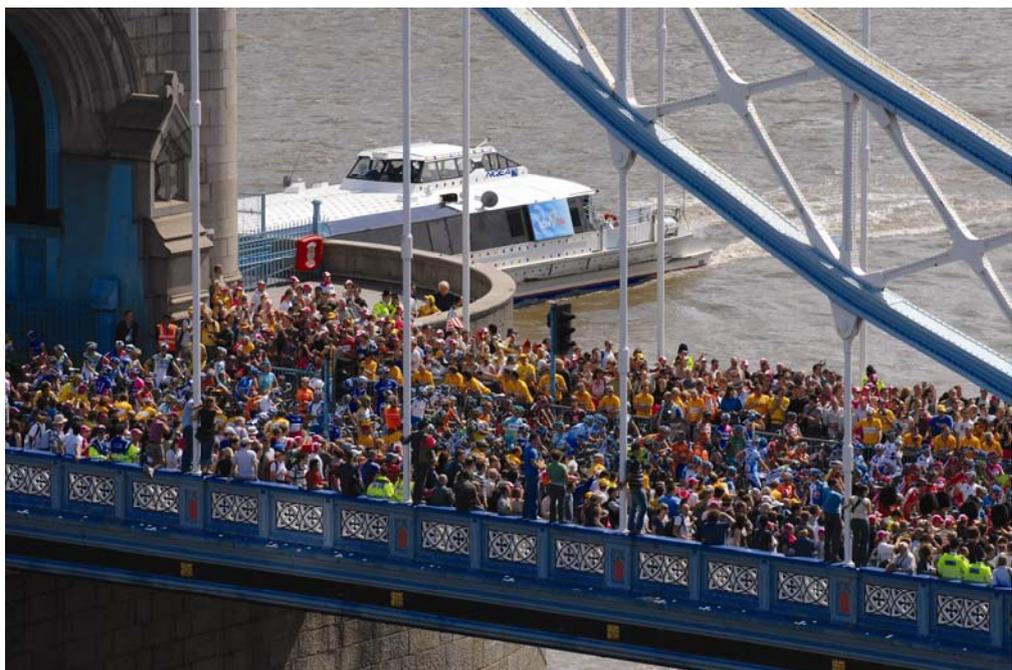
3.2.1 Numbers attending

Overall it is estimated that around three million people watched the TdF in London and Kent, on the Saturday and Sunday. Total estimated numbers attending have been taken from a range of sources including the Police and local authorities.

In addition the July 2007 Omnibus Survey based on a telephone sample of 1,003 people from inner and outer London showed that 7% said they had attended a TdF event (current population estimate for London is 7,512,400, mid 2006 Office for National Statistics). 7% equates to 525,900 Londoners attending over the weekend – that is in the region of 260,000 per day allowing an audience at the opening ceremony and some responders visiting more than one event. Cross referencing this with SIRC figures which report that 28% of the crowd on Saturday was from London, the total crowd equals $100/28 \times 26,000$ which amounts to 928,571. This correlates with police and organisers' estimates.

High rates of London Underground use were reported and are borne out by TfL's own figures for that weekend, showing that an additional 960,000 single or 460,000 return tube journeys on Saturday 7th July compared with the equivalent day in 2006. After allowing for Underground usage to other major events taking place that day, such as Live Earth concert at Wembley, Twickenham and Hampton Court Flower Show, this still results in 330,000 additional return journeys which could be attributed to attendance at the Tour de France Prologue. Since research reported in Table 2A above shows that around 22.5% of people attending this event travelled by tube, the conclusion is that there were 1.46 million spectators on the Saturday, suggesting that the estimated attendance figure of 928,571 was a conservative estimate.

However the estimate of 900,000 on Saturday is the base figure for the data in this report.



3.2.2 Profile of attendees at Tdf and related events in London

Table 2A: Comparative Profile of Attendees

	TdF Prologue and Stage 1 (Sat and Sun) Economics report data London	TdF (Sat and Sun events excluding Cycling Festival) Synovate data London	Cycling Festival only (Sunday) Synovate data London	TdF Stage 1 Economics report data Kent	TdF Stage 1 Synovate data Kent
Male	70%	64%	62%	56%	50%
Female	30%	36%	36%	43%	50%
Age	16-29 22% 30-59 69% 60+ 10%	16-34 40% 35-54 48% 55+ 11%	16-34 39% 35-54 46% 55+ 15%	16-29 17% 30-59 69% 60+ 14%	16-34 31% 35-54 48% 55+ 21%
Socio economic profile		ABC1 81% C2DE 15%	ABC1 73% C2DE 24%		ABC1 71% C2DE 28%
Disability	4%	4%	5%	n/a	5%
Ethnicity	n/available	82% white 18% BAME	86% white 14%BAME	n/a	97% white 3% BAME
Residence Greater London	28%	53%	49%	Residence Kent 66%	Residence Kent 61%
Residence elsewhere UK	62%	34%	38%	34%	34%
Residence outside UK	10%	13%	13%	4%	5%
Method of travel					
Foot	13%	13%	9%		37%
Bike	7%	9%	16%		5%
Car	5%	17%	10%		38%
Train	33%	28%	28%		15%
Tube	24%	21%	28%		n/a
Bus	4%	9%	10%		2%
Other/mixed	14%	n/a	n/a		

Table 2B: Summary Profile of Attendees at TdF Events: Mode of Travel and Cycling Intentions

Event	Profile	Cycle to Event?	Will they cycle more?
TdF	Typical cyclists Kent – more average	8% in London	2 in 5 said yes (for London Saturday event 1 in 2)
Festival	Typical cyclists	31%	More women than men said yes
Go-Ride	Young people (events aimed at encouraging young people)	not known	3 in 5 interested in joining a Go-Ride club
LCC organised ride to Prologue	Two thirds were women	100%	7 in 10 said yes
London average	13% of Londoners use cycles – mostly for leisure	n/a	A third of Londoners said they would consider it.

3.2.3 Who people came with

There was a good spread of types of groups attending, showing a wide appeal. Overall, the picture is of a family and social event with people arriving with family and friends. However the solo attendance is also quite significant.

Table 3: Did you attend in the company of others?



3.3 Economic Impact: Amounts Spent by People in Connexion with the TdF

The total spend arising from TdF was £73 million in London, £15 million in Kent and a further £35 million of value generated by the extensive and favourable press coverage.

There is also evidence that the associated events of the TdF encouraged people from outside the UK to spend longer in London and that this need was well met by the hospitality industry.

As noted above in Table 2A the event attracted a large number of visitors from outside London. Some were day visitors, while others stayed in London, either commercially or with family and friends.

Access to the TdF and related activities was free, since the events took place on-street or in public open spaces. Expenditure by attendees therefore arose from ancillary needs, principally accommodation and food and drink.

For attendees from outside the UK, numbers of nights away from home were typically higher: One third expected to be away for 4 – 6 nights, a quarter for 5 – 7 nights, 16% for 8 – 10 nights and almost a quarter for more than ten nights.

Table 4: Analysis of Spectator Expenditure - London

Spectators	%	Expenditure per day	Total
Commercial accommodation	25	£116.33	£40.8 million
Staying with family/friends	9	£45.48	£ 5.9 million
Day visitors	20	£26.15	£ 7.2 million
London residents	45	£19.71	£ 12.4 million
Total spectator expenditure (rounded)			£65.6 million (adjusted)

Expenditure from other groups, including cyclists, media, officials and other sponsors, amounted to more than £2.6 million. The organisational spend of £5 million brought the total up to more than £73 million in London.

Table 5: Analysis of Spectator Expenditure - Kent

Spectators	%	Expenditure per day	Total
Commercial accommodation	13	£61.84	£5.9 million
Staying with family/friends	7	£20.99	£1 million
Day visitors	20	£18.82	£2.9 million
Kent residents	61	£9.42	£4.3 million
Total spectator expenditure (rounded)			£14.1 million plus adjustment £14.8 million

The overall expenditure in Kent was estimated at around £15 million averaging £20 per person. Kent expenditure has a rather different profile as fewer spectators were from outside Kent.

3.4 Media

3.4.1 Media coverage

Media coverage was unprecedented and highly favourable to the TdF and the UK. An estimated £35 million worth of free publicity was generated from the 20,000 or so articles and news items in the period 1st January 2006 – 31st August 2007. The key messages received were that a world class event requires a world class host, and London scored well as in this respect.

In addition to the high overall level of media coverage there was also a much higher than average level of positive mentions (68% compared to an average of 50% for similar events).

The news coverage was especially favourable towards London as the host of both the TdF and the 2012 Olympics. The Spanish press, in particular, cited London as a premier host city. Overall, there was a broad geographical spread of news sources, including France, the US and the Netherlands. In addition, specific key messages were well targeted, for example the message emphasising TfL's commitment to cycle training, and the benefits of cycling to both the environment and health.

Inevitably, doping was an issue, but in general the media clearly separated this issue from any responsibility by the event organisers.

The London media was overwhelmingly favourable, and the small proportion of unfavourable comment was about doping. This was far outweighed by positive coverage including, cycling's health and environmental benefits.

Kent media also strongly and positively supported the event, although the build up to the event was short in duration compared with London. Kent had very high turn-outs, which were commented on by competitors, and reflected a close involvement with sponsors and partners to the event. High levels of enjoyment were noted, and a carnival-like atmosphere prevailed.

An interesting difference between British press coverage and elsewhere is the significantly higher levels of national press coverage in the UK compared with other countries (including France) where coverage tended to be in either Regional papers or concentrated in the specialist sports publications.

3.4.2 How people heard about the TdF

More than 4 out of 5 Londoners saw or heard media coverage of some kind about the TdF. Of those, a total of more than a quarter said that it had encouraged them to attend an event.



Media coverage included a wide range of audio, electronic and printed sources.

Advertising and additional news coverage in the press and television were the means by which the majority in both Kent and London heard about the TdF. Individual websites by contrast were less well used but cumulatively, they were still an important source of information, particularly in London. The Internet was the most important source of information for cycling club secretaries who reported using it more frequently than cycling magazines.

Direct contact with friends was also an important means of information and interestingly billboards featured as another prominent source especially in Kent.

Table 6: How people heard about the TdF

Media	Londoners	Kent Residents
Advertising/printed press	54%	59%
Advertising/TV coverage	45%	57%
Through Friends	23%	17%
Billboards	15%	26%
Via a website	26%	9%
Local Council	2%	13%

In addition to the main sources of information shown here, there were a range of other methods but none was mentioned by more than 7%.

Table 7 provides further information from TfL's own advertising about the sites and numbers of people reached. A further interesting finding is that the publicity caravan which preceded the race on Saturday 7th July was seen by three in five people and was thought to be impressive by almost two thirds, of those who saw it.

However those outside London and Kent were more likely to have heard about the TdF from other sources than advertisements, press reports or television.

Table 7: Summary of advertising impacts

Media	Estimated individual adults reached
TV	5,718,000
Advertising on Buses	1,210,310
Road Facing Bus Routes	1,141,609
Underground Sites	90,276
Tube Car End Panels	691,028
Poster Advertising	372,350
Transvision: Large Screen Displays	1,155,573
Press Advertising	1,622,062

3.5 Related Activities

3.5.1 Cycling Festival

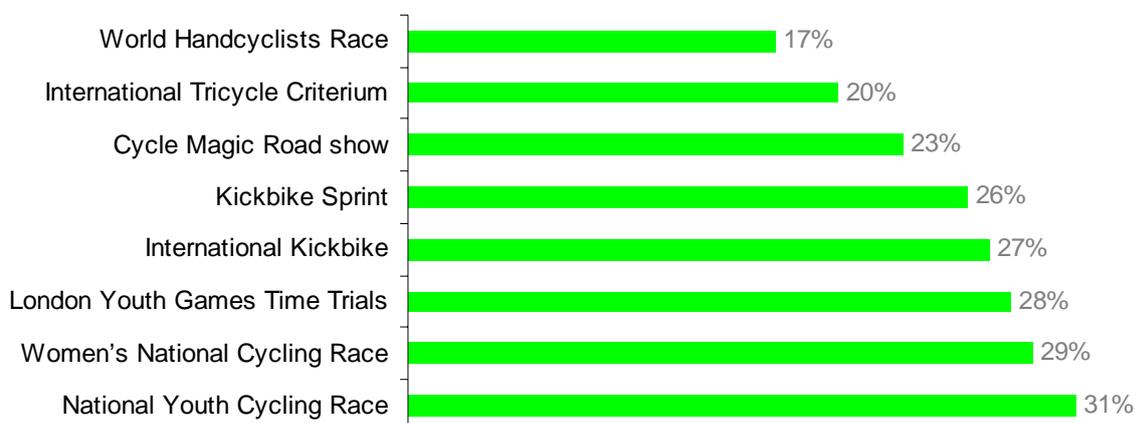
The Hyde Park Cycling Festival was held on Sunday 8th July 2007, the same day as the Grand Depart. The Festival was independent of the TdF itself, but strongly linked to it. The programme included over 350 elite international athletes competing in a wide variety of races. Competitions included Kick Bike races (showcasing footbikes without pedals), as well as Youth and Junior Time Trial Championships and a Women’s National Cycling race. These races took place over 3.5km of the course which had, the previous day, formed part of the Prologue course.

The aim of the Festival was ‘to further promote cycling in the capital in order to encourage greater fitness levels and to aid in reducing car use’. Data about the Festival attendance were drawn from 135 face-to-face interviews conducted in Hyde Park throughout the day of the event.

As with the TdF, most people (almost three quarters) came to the Festival with someone else. It seems that this was very much a social occasion, with potential for all the family to enjoy, since almost one in six came with their children.

Interviewees at the Festival were asked which parts of the programme they had or specifically intended to see.

Table 8: What did they see or plan to see at the Cycling Festival?



Interestingly about half of those interviewed *'had no specific intention to attend any particular event and presumably therefore, were there to wander around and to attend the events which caught their eye'*.

3.5.2 Go-Ride

Over the weekend of 7-8 July, BC supported 'Come and Try It Events' across London and Kent through its Go-Ride development programme.

As the bullet points below indicate, the events were very successful at reaching out and engaging young people who were not currently engaged in the sport.

- Overall almost two thirds of young people that took part in the Go-Ride activities are now interested in joining a Go-Ride Club.
- Over 900 young people attended 'come and try it' sessions at the People's Village. Fully qualified BC coaches delivered all sessions.
- Of the young people attending, 790 were not previously Go-Ride club members, but over half of them subsequently said they were now keen to join a club.
- Across the London Boroughs 1193 young people were engaged in various cycle related events.
- Attendance by young people at other community-orientated cycling events in the South East were:

• Canterbury	237
• Maidstone	80
• Gravesend	229
• Tonbridge	68
• Greenwich Park	151
• Bexley	118
- Across all events that weekend a total of 2025 young people were involved.
- Away from the south-east, 27 other cycling clubs ran events to coincide with the TdF, attracting an average of 40 participants. BC estimate that a further 1500 young people additional to the numbers given above had the opportunity to try a Go-Ride session.

3.5.3 LCC Rides to the Prologue Event

TfL teamed up with the London Cycling Campaign (LCC) to deliver a series of guided rides, targeted at up to 2,000 novice, returnee, family and child cyclists, led by the LCC's borough groups members from different locations in outer London. The rides converged on an exclusive access enclosure alongside the Prologue course for a track-side viewing experience. Riders were led home again at the end of the day.

Preliminary analysis of the evaluation forms indicates that this event attracted a range of age groups, and a substantial majority of women. This suggests that an organised and safe environment may encourage more women to participate. This is underlined by the finding that three quarters said that the event had encouraged them to cycle more. These are preliminary estimates as LCC were unable to provide the data in time for this report.

3.5.4 TfL Cycling for Sport

Synovate interviewed the secretaries of cycling clubs on a regular basis, and the latest interviews, which took place in August and September 2007 have provided the following findings:

- Two thirds of clubs organised parties for members to attend the event.
- More than half the club secretaries interviewed believed that the London Event has stimulated interest in the sport.
- One quarter believe that the event has had a positive impact on membership.
- Following the TdF the proportion of under 25s who are very interested in cycling has increased.
- Cycling club membership is overwhelmingly male, but the greater media coverage has helped to increase interest in cycling. More than a third of club secretaries reported increased expressions of interest in joining their clubs, while a quarter had already gained new members.

While these findings are an encouraging start, it raises the issue of ensuring cycling clubs do actually build on and consolidate the boost given to cycling by the success and public participation in the TdF.

3.5.5 Local Authority and other organisations' activities

Apart from the key events in Central London, London Boroughs and Kent Councils along the route also set up a wide range of associated events which added to the cumulative impact of the TdF. A summary of some of the activities is given at Appendix 2.

4. SATISFACTION WITH THE TdF AND RELATED EVENTS

Overall 8 out of 10 people interviewed said that the TdF was the main reason for being out on the day. A related finding was that just over half of attendees at the Festival said they would have been unlikely to come to the Festival if the TdF had not been held over the same weekend.

It seems evident from the surveys that the combination of cycling and community related events in Hyde Park, and the arrangements for the TdF, including the Prologue on Saturday 7th July, worked well together to produce an overall event that was both well attended, and received high levels of approval from those attending.

4.1 Assessment Ratings for the Tour de France and Related events

A range of features were surveyed at the TdF, the People's Village and the Cycling Festival in order to assess the satisfaction of attendees. The results showed high levels of satisfaction with very few being dissatisfied. Of those who were satisfied most were very satisfied.

Table 9: Assessment ratings

	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied
The TdF as a spectacle	60%	34%	4%
The Cycling Festival as a spectacle	67%	30%	3%
Information available on the day - TdF	49%	37%	12%
Information available on the day – Cycling Festival	50%	41%	7%
Facilities available for the public - TdF	44%	47%	8%
Facilities available for the public - People's Village	47%	45%	8%
Facilities available for the public - Cycling Festival	53%	40%	6%
Stewarding -TfL (taken to mean general organisation and management)	60%	34%	4%
Stewarding – Cycling Festival	61%	31%	4%
Entertainment value - People's Village	52%	40%	8%
Entertainment value - Cycling Festival	64%	33%	2%
Availability of refreshments – People's Village	56%	36%	8%
Having appeal for people of all ages – People's Village	62%	35%	3%
Having appeal for people of all ages – Cycling Festival	74%	23%	2%

Large screens were erected along the route to add to people's view of the event at a distance. One-third of attendees in London on Saturday 7th July and four in ten Kent attendees on Sunday said they had seen the screens. The majority thought they impacted positively on their enjoyment.

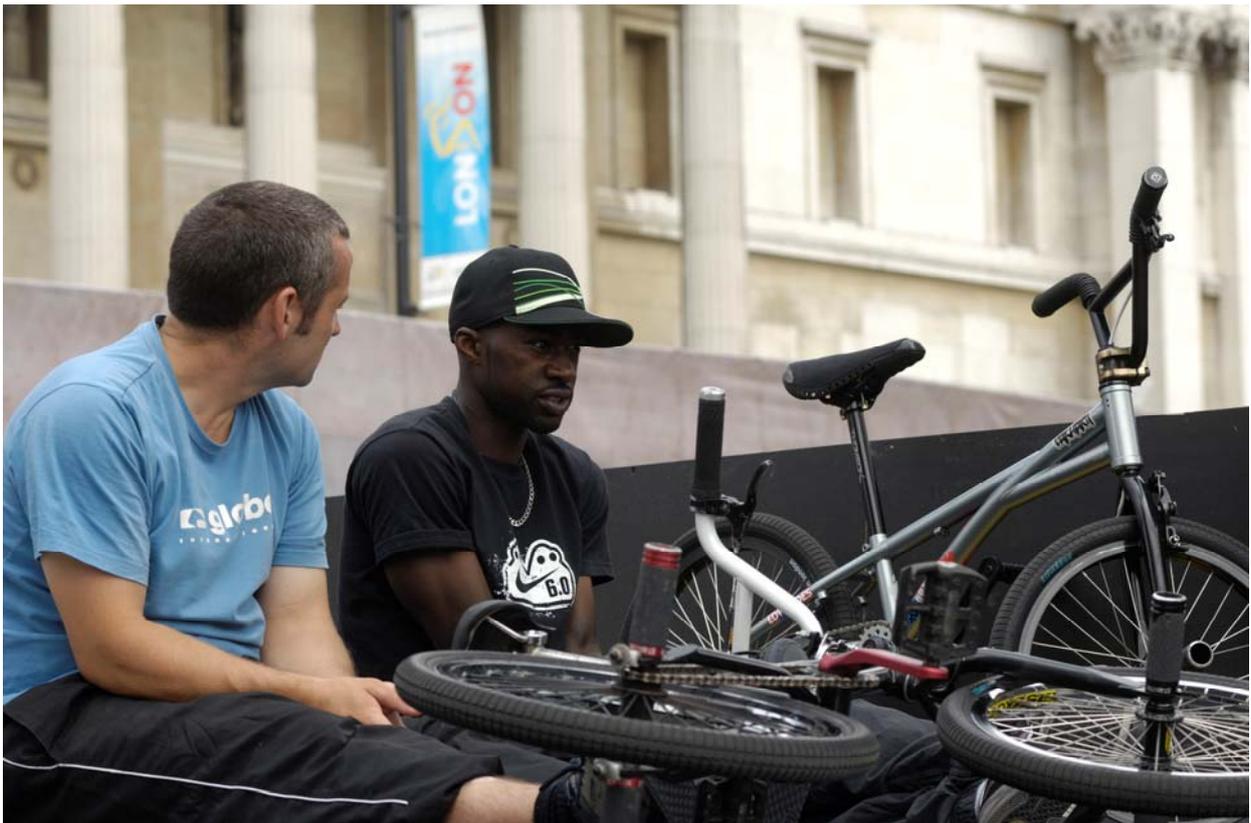
4.2 Scope for Improvements

Almost two in five of attendees at the Festival and half of those attending the TdF could not think of anything they would like improved. This indicates a very high level of satisfaction.

There is some information available from the event satisfaction surveys about what people would like to see at similar events in the future, although no dominant pattern emerges either among the TdF or the Cycling Festival attendees:

Suggestions made included: - all supported by typically by around 5% of respondents.

- Have a repair shop/repair demonstration/information about cycle maintenance
- Different racing – track/road/trials/international
- Different cycling for disabled/blind/veterans
- More publicity or information
- Better advertising
- More food stalls/different food
- More public lavatories



5. CYCLING BEHAVIOUR AND IMPACT ON ATTITUDES

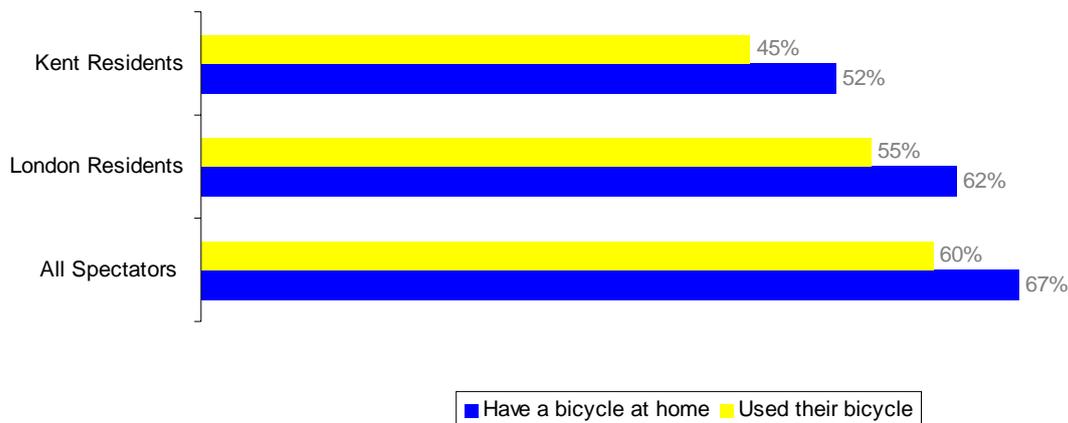
A diversity of information is available about present patterns of cycling behaviour. From the studies commissioned by TfL there is clear indication of people's willingness to consider increasing their journeys by bike. Analysis of cycle flows show an 83% increase in cycling since 2000.

The most recent TLRN data shows that cycling levels continue to be maintained above TfL's target. Although, cycle flows are seasonally variable and despite a cold summer there is still a 10.5% increase in cycle levels on TLRN relative to the previous year.

One major caveat is that it is difficult to know whether cyclists would, given the right incentives, make more trips than they do now, and whether their trips by bike would replace journeys by other modes. Similarly, if more people take up cycling regularly, would this mean a net addition to their total trips or would they substitute cycling for other modes? From a health point of view, these distinctions may not matter, but as part of reducing congestion they are much more important.

What is also not known is how and whether greater interest in cycling for sport translates into the greater use of a bike for other types of journey. In this context it is interesting to note that spectators at the TdF had much higher rates of bike ownership and use than the general population of London.

Table 10: Did the spectators at the Tour de France have, or use, a bicycle?



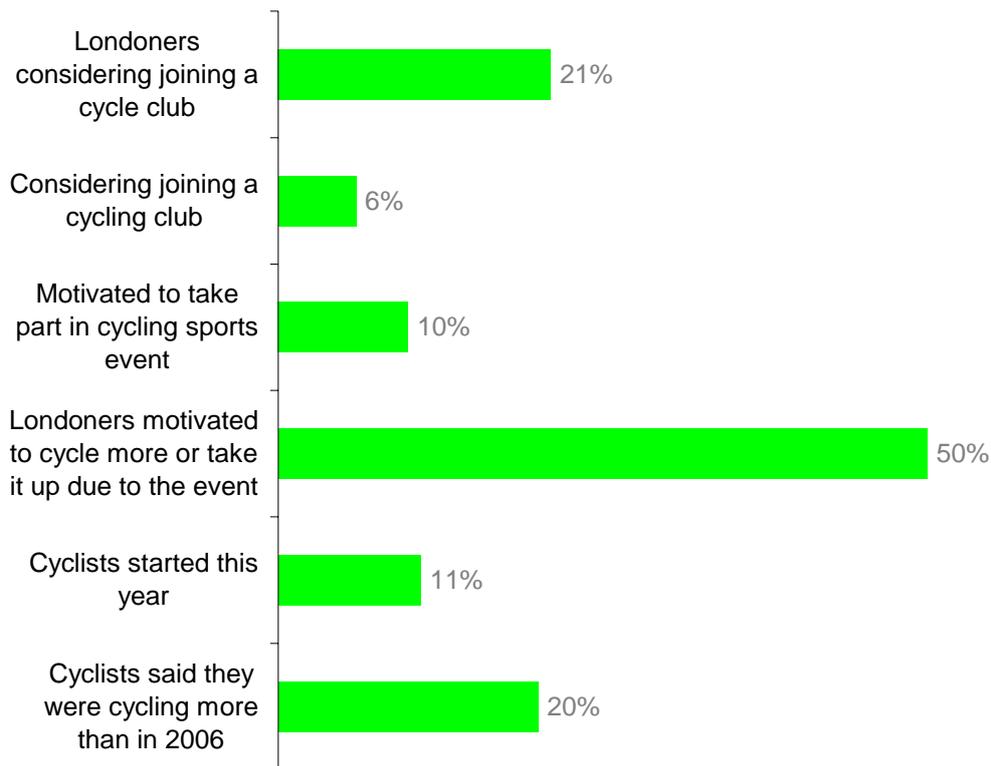
This contrasts with one third among Londoners as a whole.

Will those who attended TdF cycle more?

Some indication of trends may be seen from a projection of cycling activity levels over time and the stated intentions of respondents. The Satisfaction Survey of attendees at the TdF showed that four out of ten thought they were likely to cycle more after seeing the event.



Table 11: Future intentions?



- Those who thought they would be motivated to cycle more were also asked, as part of the Satisfaction Survey, what kind of cycling they would choose. Almost two thirds thought this would be for leisure purposes.
- In contrast, very low percentages in either location thought they would cycle more to work, university, college or school (4% overall) or to go shopping (2% overall).
- Women, those aged 16 – 34 and social classes ABC1 were the most likely among cyclists to say that their participation rate had gone up.

These results raise the important question of how best to capitalise on the success of the TfL event. In particular, how the greater enthusiasm for cycling as a leisure activity expressed by those attending the TdF can be transformed into a substitute for journeys by car or public transport. Further information about the wider context of cycling in London which is relevant to this question is given at Appendix 3.

Appendix 1: List of reports

1. Cycling Numbers Post Event Summary
 - 1a Go-Ride and Tour de France
2. Customer Event Satisfaction
3. Cycle Festival Evaluation
4. Customer Awareness Reports:
 - 4a 8/06, 4b 2/07, 4c 6/07
5. British Cycling Review (5a) and Summary (5b)
6. Omnibus summary with data
7. Attitudes to Cycling
8. Event awareness
9. Economic Importance
10. Media Assessment
11. Borough Studies
12. Kent County Council Canterbury data
13. London Cycling Campaign
14. Cycling for Sport
15. TLRN Cycling Data Periods 1-6

Other documents

- A Funder Objectives
- B Equality Impact Assessment and form

Other Sources of Information

London Cycling Campaign 'Grand Depart, Tour de France 2007: Associated Events – Community Activities. Appendix A'

Amaury Sport Organisation 'Debriefing Tour de France 2007;'; Debriefing Tour de France 2006'

TfL - Media Plan for Tour de France

TfL supplied data on Tube journeys weekend of Saturday 7th and Sunday 8th July 2007

Appendix 2: Local Authority and other organisations' activities

Bexley	French markets on six separate occasions, open days at leisure centres, local roadshow and fun day at Danson Park promoting cycling and TdF, sponsored cycle rides, extended pub opening, barbeque for spectators. Artist in residence worked with schools and artwork displayed along TdF route.
Bromley	'Tour de Penge' (May) – traffic free bike ride included information about TdF and police tagging of bikes.
City of London	Extreme Mountain Bike stunts, fun bikes and tryouts on Sunday 8 th outside St Paul's – over 600 people tried out a bike and 1,000 saw the stunt shows.
Deptford	French themed events over TdF weekend including French market, cultural exchange with Dutch and French dignitaries, bike roadshow with bands and food. Roadshow (June 10 th) at Horniman Gardens with stalls from local businesses and community groups offering advice on cycling in general and TdF.
Greenwich	French atmosphere created in town centre during Stage 1. French street theatre, market stalls, cycling activities and French picnic.
Hackney	Community cycle training in three months before TdF. Family Cycle Club set up training and fun bike event with information, refreshments and puppet shows.
Hillingdon	Minet Country Park Cycling Festival (16 th June) as lead-up to TdF. Bike trying events, security coding, cycle maintenance and safety checks, inter-schools skill challenge, quiz and demonstrations. 'Bike Snakes' to get school children from Hounslow to the Minet event.
Kingston upon Thames	Women on wheels rides – women-only bike rides to increase confidence. Circular bike rides in preparation for led rides to TdF. Cycling treasure hunts for four different parts of the Borough with TdF tee shirts as prizes. Cycle marking sessions.
Islington	Cycling road show (June 16 th) including cycle training demos, pedal powered entertainment and stunt cyclists.
Lambeth	"I love my bike" activities, library displays on history of TdF, floral displays, commemorative map and children's art competition 'I love to Cycle'. In addition, children's 'try-out' sessions were held at the Herne Hill Velodrome Cycle Track over 8 weeks prior to the TdF involving practical cycling sessions with different types of bike. Over 2,000 children from six London Boroughs took part and were also given information packs and guidance on how to watch the first stage of the TdF. Bike festival on Streatham Common (16 June).
Southwark	Carnival and family picnic themed on 'Great Journeys' to tie in with TdF – parade included sustainable vehicle options including cycling, 'green' roadshow, French market and street performers. Pre-workshops to decorate bikes themed around French and British flag colours. Sculpture of cyclist and large screen to show TdF all way to Canterbury.
Sutton	Women's cycle race weekend designed to coincide with finish of TdF in Paris.
Tower Hamlets	Taster cycling training, bike games and secure schools viewing area to watch TdF by the Tower of London.
Waltham Forest	'Tour de Waltham Forest' rides, cycling road show in town centre including information about TdF, BMX and Mountain Bike displays and bike try-outs, bike assessments, competitions and music.

Canterbury	Special exhibition putting TdF in the context of the history of cycling. <i>(More detail to come – information received too late to be included in time for this report.)</i>
Tunbridge Wells	Cycling try-out sessions at Bedgebury Forest Visitor Centre.
Ashford	Tour de Homewood event, slow bicycle race and fete.
London in Bloom	This was a TfL Special Projects sponsored competition encouraging Boroughs along the Stage 1 route to enter displays. The winners included cycling themed flower and art displays at Rotherhithe and Deptford. In Deptford the Council also encouraged residents to display yellow flowers along the route including distributing packets of seeds.
Pub Quiz	In June TfL compiled over 2,000 pub packs themes around the TdF together with additional information including maps and road closures. Feedback was very positive with many pubs displaying posters and running quizzes.
Sustrans	A programme to encourage cycling to school linked to the TdF mileage. Over 3,000 school journeys were made by bike during the three week period involving 10 schools, 500 pupils as well as parents and teachers.
School Environmental Awards Programme	The GLA provided 800 primary and secondary schools with TdF materials and set up a competition to win a limited edition cycle jersey.
Design Museum	Ben Wilson (famous for Lowrider bike designs) and public encouraged to bring bikes to the Museum and explain their 'love of their bike' on camera. Footage being made into a unique archive of memories.
Children in Crisis	Sponsored cycle event along Stage One route.

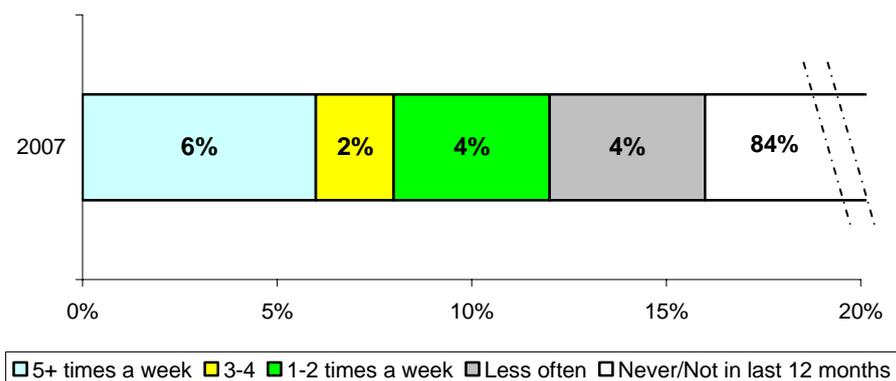


Appendix 3 The wider context of cycling in London

Apart from the TdF itself, related research gives a broader picture of cycling in London. The main source used is the annual monitoring survey of cycling behaviour and attitudes commissioned by TfL.

Who cycles?

Cycling frequency for Londoners with access to a bike
(35%) (84% with access have not cycled in the last 12 months)



The proportion of cyclists making 5 or more journeys a week is up slightly year on year with both 2006 and 2005.

- A profile of the typical cyclist suggests that they:
 - tend to be more often male than female;
 - belong to the 16 – 34 age group and social classes ABC1;
 - live in Inner rather than Outer London.
- They are more likely to be white than the general population of London as a whole.
- This profile has changed over the past few years, becoming less skewed towards under-35s and cycling is now more likely among inner Londoners than previously.

What journeys are made by bike?

- Cycling for leisure or personal business is the most likely type of journey.
- Around half of cyclists have cycled to work or college and this proportion has significantly increased since 2005.
- The proportions cycling for shopping or personal business have also increased since 2006.
- Among children, a high proportion (eight out of ten) cycle for sport or leisure, six in ten cycle for shopping or visiting friends, but less than one-third cycle to school.

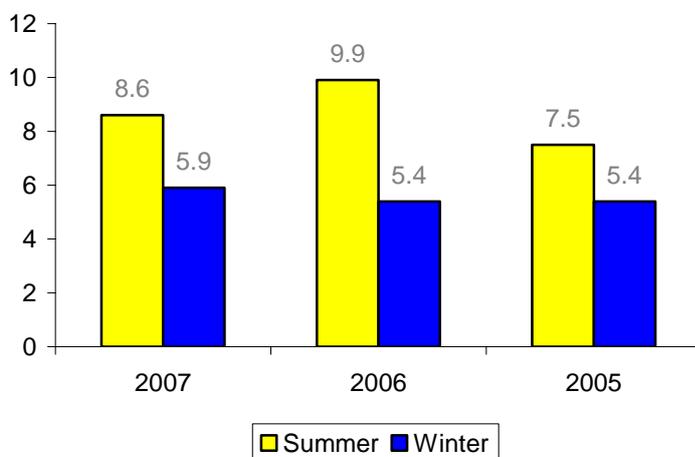
How often?

- Since March 2000, measured cycle flows in London indicate a growth of 83%, which has already surpassed the ambitious mayoral target of an 80% increase

by 2010. Of those surveyed, over half agreed that they are cycling at least the same amount as last year.

- The most recent TLRN data shows that cycling levels continue to be maintained above TfL's target. Although, cycle flows are seasonally variable and despite a cold summer there is still a 10.5% increase in cycle levels on TLRN relative to the previous year.
- Cycling is weather dependent: Average numbers of cycle trips are lower in winter months than during summer, with about one-quarter of cyclists not making any trips in winter.
- Overall, one-third of cyclists make more than ten trips per week during the summer.

Average number of cycle trips per week



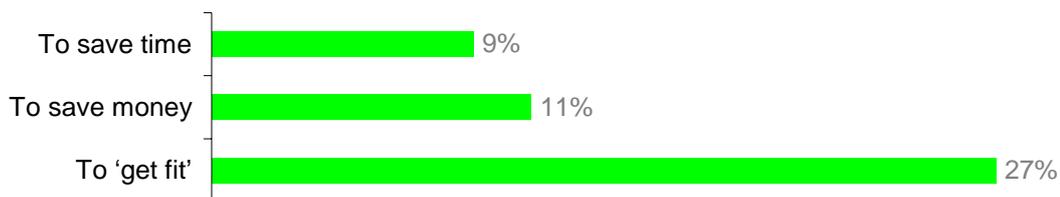
The slight drop for the summer of 2007, relative to 2006 is probably due to the poor summer weather, as the winter figures represent an increase over 2006, in line with the upward trend in cycling noted above.

Are they trained?

- One-quarter of Londoners have received some form of cycle training, with just 1% of adults and 7% of children having done so in the past year - little change from 2006.
- The implication is that few Londoners are taking up the various cycling training schemes on offer. When asked very few (7%) thought they were likely to do so in the next 12 months.

Why cycle?

The main reasons given for cycling

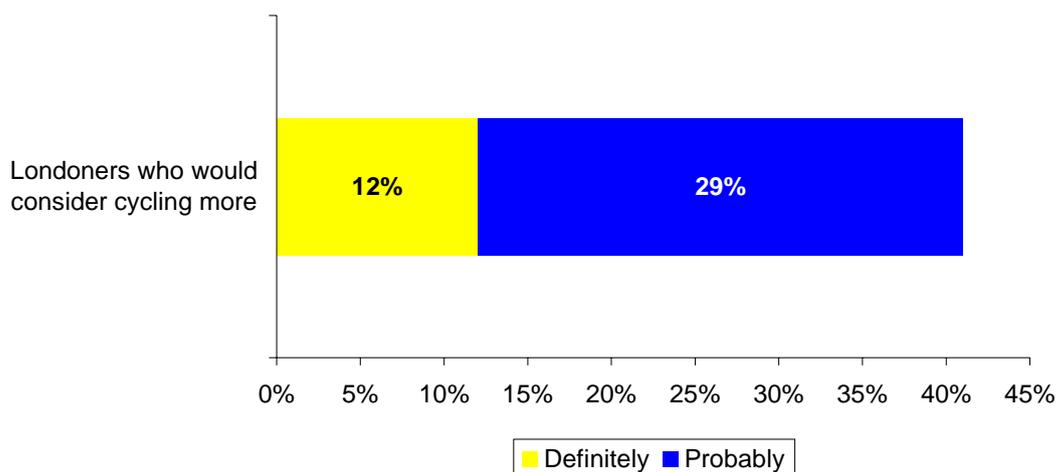


Reasons for cycling less



Will they cycle more?

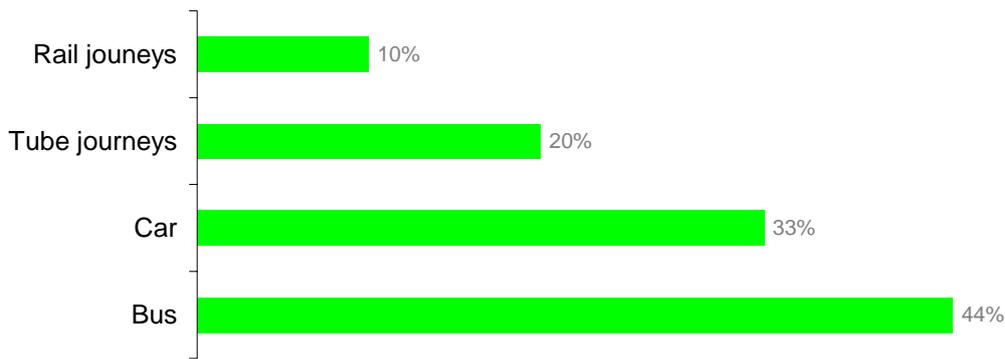
Would you consider cycling more?



This represents a significant increase in 2007 compared to 2006, (in line with TfL's analysis of cycle flows) and suggesting Londoners are becoming more open to the idea of cycling. However, of those who would consider cycling more, over a quarter already currently cycle in and around London.

- About one fifth of Londoners commute a distance of less than 2km but only 1% usually does this by bike.
- Men, younger people (under 45s) and those living in inner London were all more likely to consider cycling in the future.

The most popular modes to be replaced by more cycling

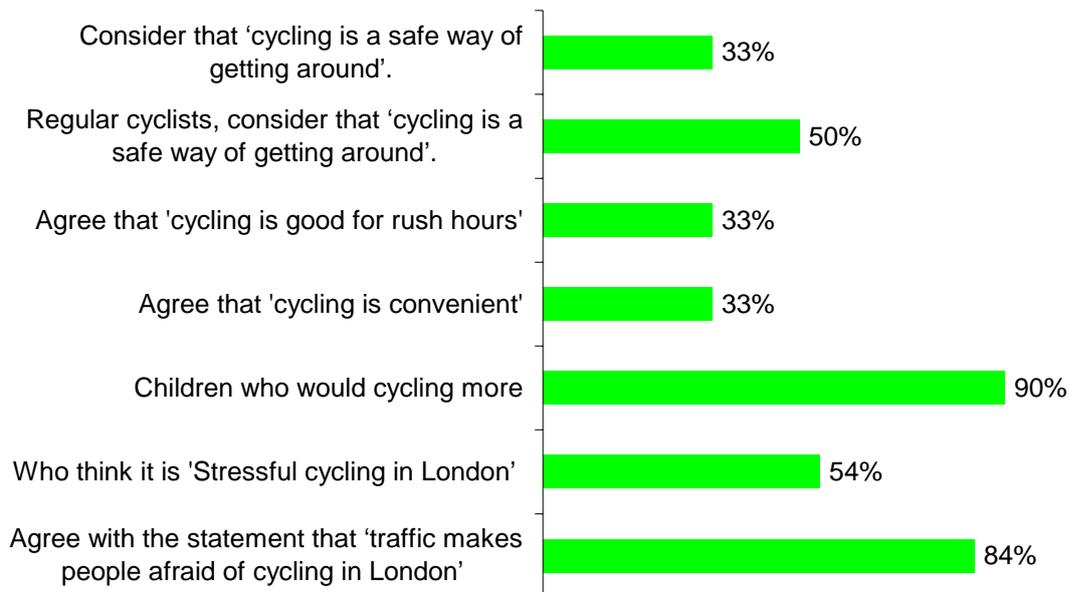


How does cycling compare with other modes?

- Walking is the preferred mode in London where possible, favoured by eight out of ten of respondents to the monitoring survey.
- Cycling and the tube are less highly rated, with around four out of ten Londoners favouring it. This picture has changed little since 2005.
- Among those who cycled at least once a month, cycling was seen as 'a modern form of transport' by half, while the car was seen as the most modern form by two thirds.
- Among children, cycling was the most attractive mode (together with walking).

Why people do not cycle more?

Why Londoners do not cycle more?



How secure is cycling?

- Half of London cyclists feel safe from anti-social behaviour or crime when cycling
- Children feel safer – three quarters feel very safe or quite safe.
- Feelings of personal security drop significantly at night, when only one fifth of adults and children think they would feel safe.