

Tour of Britain

2009

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October 2009



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Research conducted by Synovate

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1 Executive Summary

The research on which this report is based was commissioned by TfL. There were two strands to the project, with the first being a survey prior to the Tour of Britain event coming to London. The objective of the first survey was to measure awareness of the event among Londoners. There was a follow up survey which was conducted on the day of the event with those attending the London leg of the 2009 Tour of Britain. This survey measured awareness and perceptions of the event.

The main findings are reported below:

Awareness on the Tour of Britain Event

Awareness of the Tour of Britain 2009 was higher than that for 2008. In 2009, four in ten reported that they had heard of the impending race whilst in 2008 around a third had heard of it. In 2009 significantly more people (than 2008) were aware that the race was coming to London in September.

The 2008 London leg of the Tour of Britain opened the nationwide tour and this year, London has closed the tour. Therefore, the 2009 increase in the proportion indicating that they had heard of the event could be due to the exposure of the event prior to it arriving in London.

Television coverage was the most mentioned medium by which people found out that the Tour of Britain was coming to London (37%). Other sources of information mentioned include press coverage (26%) and word of mouth (19%). The sources of information mentioned in 2009 were in line with those for 2008.

At the actual event, people were most likely to say they had heard of the event through word of mouth and advertising/press coverage, each mentioned by a quarter of people.

Just 3% of people with whom we spoke prior to the Tour of Britain event indicated that they would be attending the event. There were no significant differences in how people heard of the event in 2008.

On the whole, those attending the 2009 Tour of Britain event were satisfied with it. Seven in ten indicated that they were very or fairly satisfied, this is in line with 2008 where a similar proportion were satisfied.

Perceptions of the Tour of Britain

The Tour of Britain was perceived very positively, with eight in ten reporting that they had enjoyed the event. This is a significant rise in reported enjoyment since 2008 where 70% of people rated the event as enjoyable.

When asked to rate various aspects of the Tour of Britain event the two that were rated highest were the event's ability to appeal to people of all ages (79%) and the entertainment value (71%).

The screens (26%) and the publicity/advertising for the event (19%) were viewed as the two top aspects that could have improved the Tour of Britain event for spectators.

Bicycle use

The Tour of Britain event attracted a high number of cyclists, with the majority of those who attended reporting that they cycle either for leisure and/or to commute. The proportion of people indicating that they cycle more this summer in relation to previous summers has increased.

Background and Objectives

The last leg of the Tour of Britain 2009 event took place in Central London on the afternoon of Saturday September 19th with 10 laps of an 8.5 kilometre course starting and finishing near the Houses of Parliament.

The Tour of Britain attracted many visitors and the event was also shown on television.



The key objectives of the surveys was to evaluate awareness of the 2009 Tour of Britain and the level of enjoyment among those who attended the event.

Other specific objectives were to:

- Profile attendees and identify the methods by which they got to the event
- Identify the reasons for attending
- Measure people's perceptions of the race
- Measure the overall impact on the cycling habits of the attendees

2 Survey methodology

There were 2 phases to this research, a pre-Tour of Britain survey and a follow up survey at the event. The first phase was a telephone survey conducted with a representative sample of London residents. A total of 509 interviews were conducted. The second survey was conducted at the Tour of Britain event using a face-to-face method with a total of 126 event attendees.

The pre Tour of Britain Event survey was conducted with people who are resident in Greater London. The event survey was open to all adults attending the event and there were no quotas set though interviewers were asked to reflect the observed profile of attendees in the interviews that they conducted.

Interviews with Tour of Britain spectators were conducted between 13.00 and 16.00.

The telephone fieldwork was conducted between 11th and 18th September 2009. Interview length was on average 5 minutes. Both questionnaires are included in the Appendix.

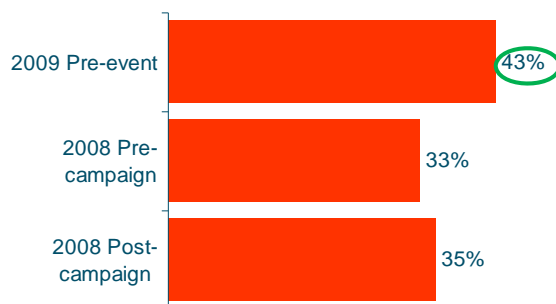
3 Main Findings

This report draws on findings from the telephone research conducted prior to the Tour of Britain professional cycle race 2009 and the findings conducted at the actual event on 19th November 2009. The report will also draw comparisons with surveys from 2008 where a total of 3 surveys were conducted. The first survey was conducted pre marketing campaign and the second post campaign with the final survey being conducted at the Tour of Britain event. Throughout this report, where comparisons are made this is clearly highlighted.

3.1 Awareness of Tour of Britain – Pre event

Prior to the Tour of Britain professional cycle race 2009, around four in ten (43%) Londoners had heard of the impending race. Awareness of the race was significantly greater than in 2008. Pre the Tour of Britain promotional campaign in 2008, a third of Londoners (33%) had heard of the race, and post the campaign there was a very modest increase in the number of people saying they had heard of the race (35%). Therefore, as shown in the chart below, 2009 has seen a significant increase in the proportion of Londoners who had heard of the race. It is worth noting that in 2008, the London leg of the Tour of Britain opened the nationwide tour and this year it has closed the tour. Therefore, the increase in the proportion indicating that they had heard of the event could be due to the exposure of the event prior to it arriving in London.

Chart 1-Have heard of the Tour of Britain professional cycle race prior to the event

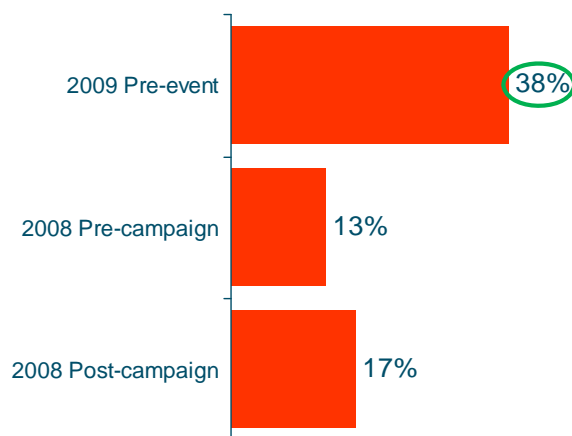


Source: TOB1 Have you heard of the Tour of Britain professional cycle race? 2009 pre-event (n=509); 2008 pre-campaign (n=1007), post campaign (n=500)

In 2009, there were some marked demographic differences. Londoners aged 34 or under (23%) were significantly less likely to say they had heard of the event than those aged 35 or over (54%). Similarly, significantly more Londoners from a white background (47%) were likely to say they had heard of the Tour of Britain 2009 race than those from Black and Minority Ethnic backgrounds (31%).

Awareness that the race was coming to London in September 2009 stood at around four in ten (38%). Awareness levels were consistent across all demographic groups. In 2008, there were significantly fewer Londoners who were aware that the September 2008 race was coming to London than in 2009. At the 2008 pre campaign stage, around one in eight (13%) were aware of the forthcoming event and the post campaign stage saw a rise of +4% (17%).

Chart 2- Awareness of the Tour of Britain coming to London in September 2009



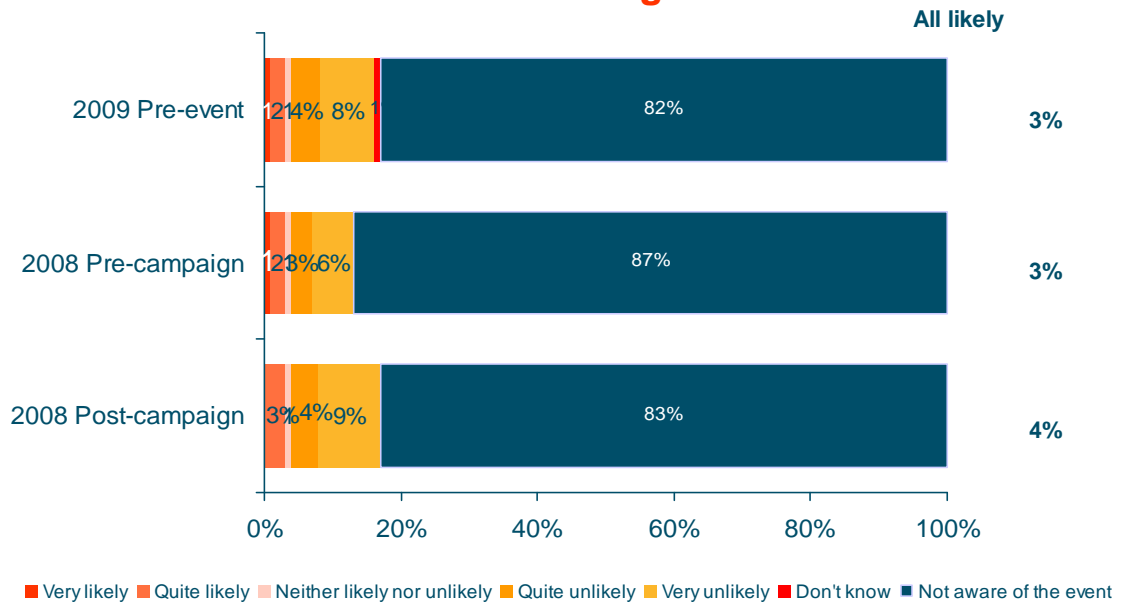
Source: TOB2 Are you aware that the Tour of Britain professional cycle race is coming to London in September 2009? 2009 (n=509); 2008 pre stage (n=1007), post stage (n=500)

Several mediums were mentioned as being the means by which people who were aware the race was coming to London in September 2009 had found out about the event. Television coverage was the most mentioned source of information, with over a third (37%) saying they found out about the race through this medium. A quarter (26%) mentioned press coverage and one in five (19%) found out about the event through word of mouth, including family and friends. Around one in eight found out about the event through radio coverage (13%) or poster advertising (12%). All other information sources were mentioned by 6% or fewer. The

information sources mentioned in 2009 were in line with those from 2008 at both the pre and post campaign stage.

Of all the people interviewed pre the 2009 event, just 3% thought they would attend the event. The proportion who indicated that they would attend the race was in line with that from 2008.

Chart 3-Likelihood of attending the event



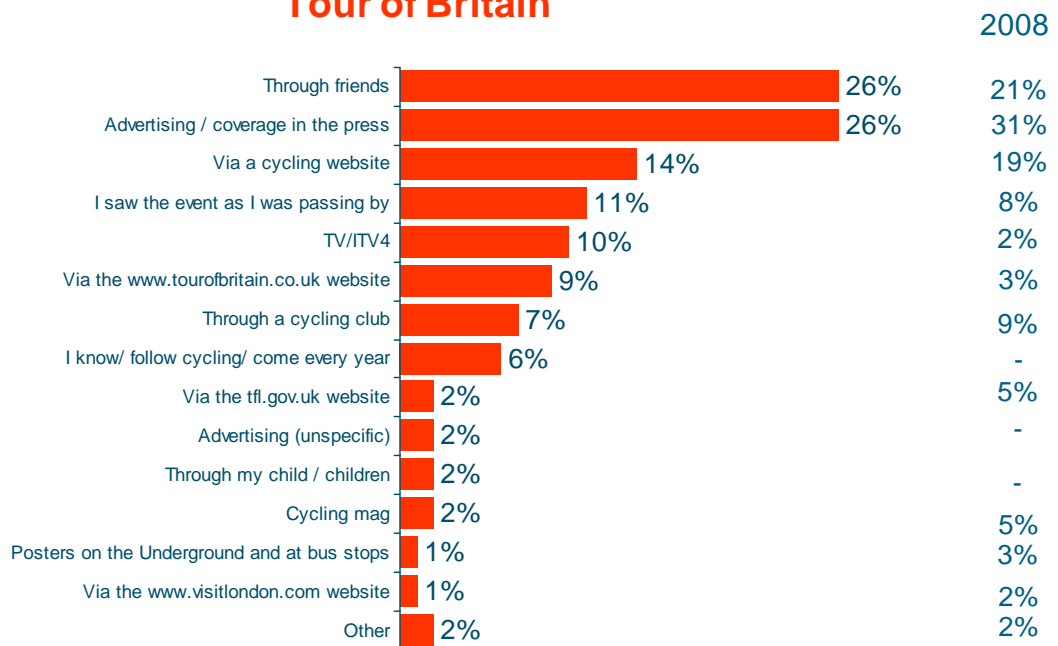
Source: TOB4 How likely do you think you personally are to attend the event? 2009 (n=509); 2008 pre stage (n=1007), post stage (n=500)

3.2 The Tour of Britain event

Compared to the profile of Londoners, those attending the Tour of Britain 2009 event were disproportionately white, male, aged under 45 and were from ABC1 socio background. This is consistent with the profile of London cyclists. The profile of those attending the 2009 event was very much in line with that from 2008.

Those attending the Tour of Britain event were most likely to have heard of it through friends (26%) or advertising/press coverage (26%). One in seven (14%) heard of the event through a cycling website and one in ten (9%) through the official Tour of Britain website. Another one in ten (11%) saw the event as they were passing by and a similar proportion saw it on television (10%). There were no significant differences in how people heard of the event between 2008 and 2009.

Chart 4- Methods of having heard about the Tour of Britain



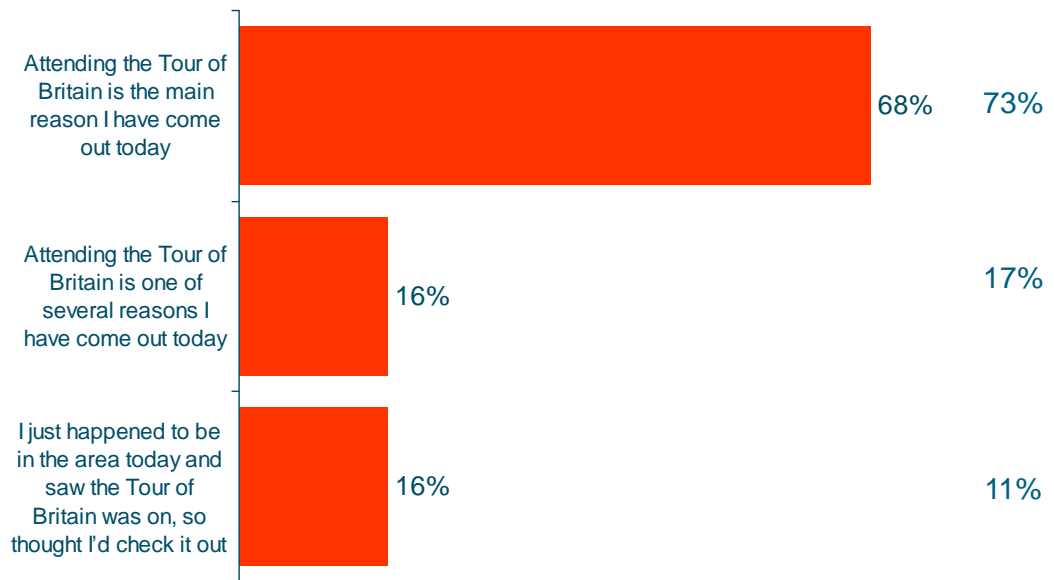
Source: Q4: How did you hear about the Tour of Britain? (n=126)

Nearly seven in ten (68%) attending the Tour of Britain event were out on the day specifically for the event, whilst one in six (16%) were attending the event as well as out and about for other reasons. Another six in ten (16%) were passing by and just happened to see the event.

The reasons for attending the 2009 event were in line with those given in 2008.

Chart 5- Reasons for attending the Tour of Britain

2008

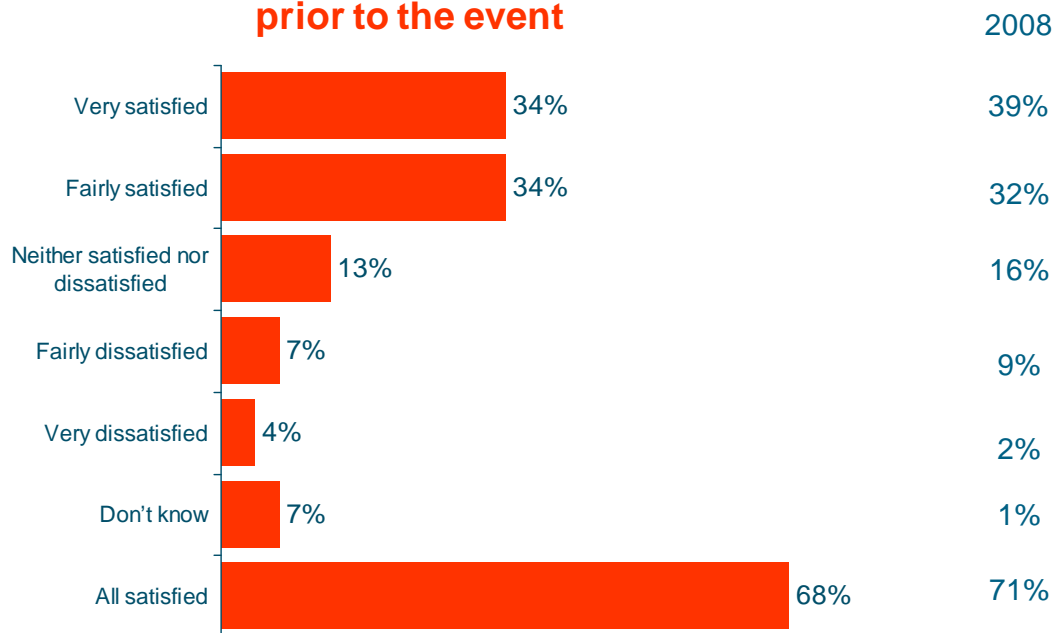


Source: Q3: Which of the following statements best describes why you are here today? (n=126)

On the whole, people attending the event were satisfied with the information they had seen about the tour prior to the event. Nearly seven in ten (68%) were satisfied with the information they received, while one in nine (11%) were dissatisfied.

The 2008 (71%) satisfaction levels for information received prior to the event are in line with those from this year.

Chart 6- Satisfaction with Tour of Britain information prior to the event

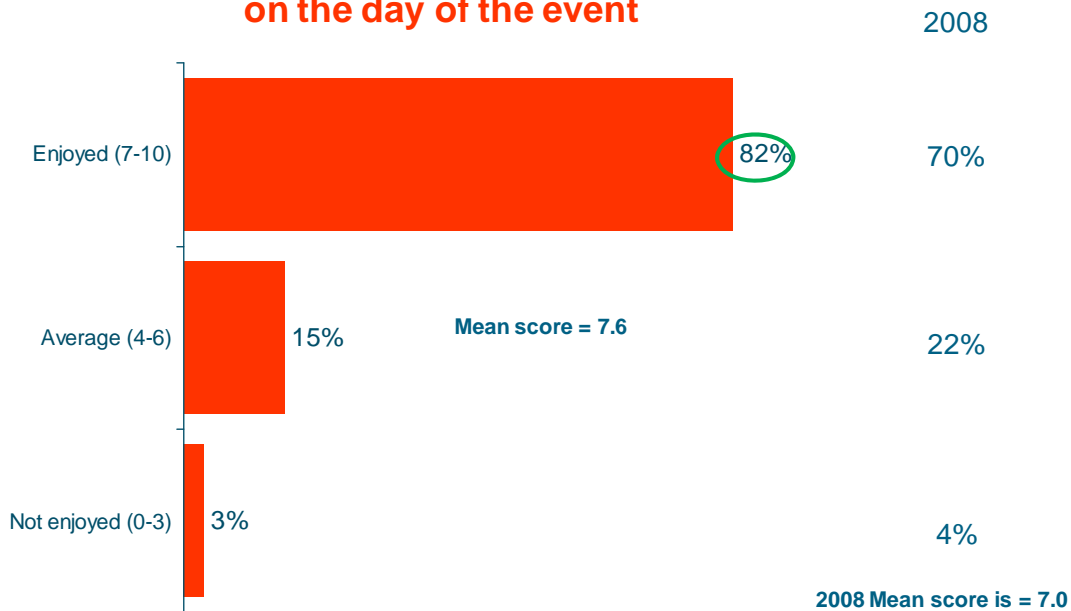


Source: Q5: Overall, how satisfied have you been with the information you have seen about the Tour of Britain prior to the event? (n=126)

3.3 Perceptions of the Tour of Britain Event

Overall, the Tour of Britain event was seen as enjoyable. Eight in ten (82%) gave the event a rating of 7-10 thus indicating that they found it enjoyable. Around one in seven (15%) gave the event a rating of 4-6 indicating that the event was average. Just 3% rated their enjoyment of the event as poor. In 2008, fewer people gave the Tour of Britain event a rating of 7 or above (70%). Therefore, 2009 has seen a 12% rise in reported enjoyment.

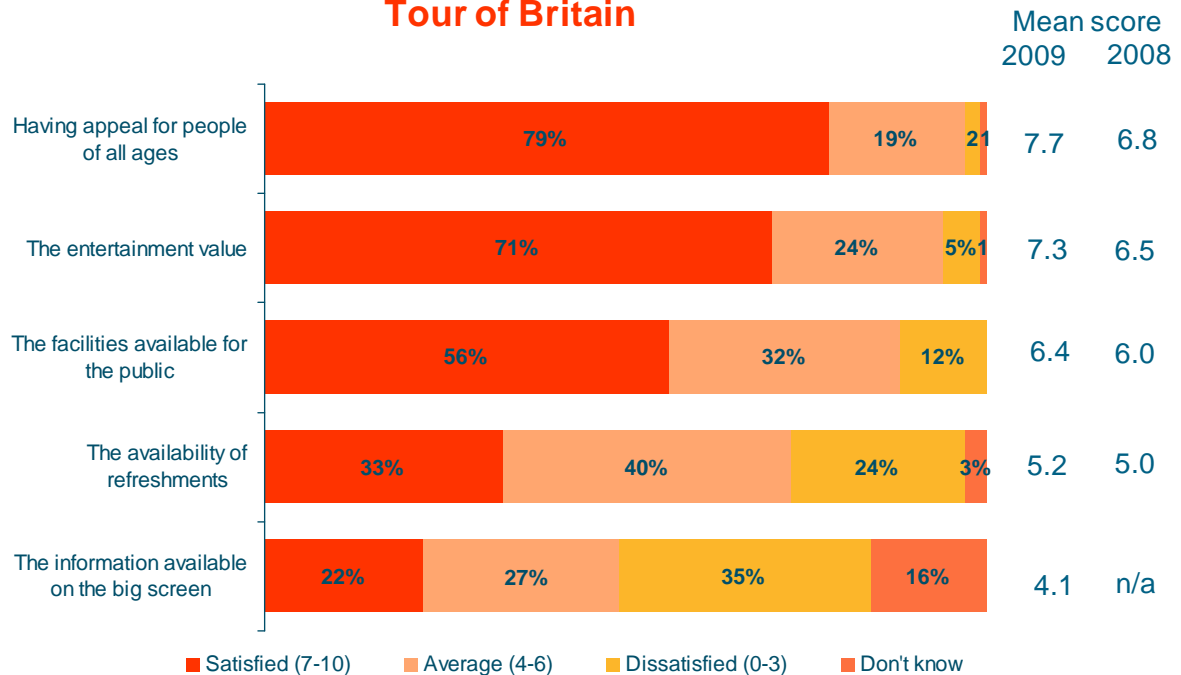
Chart 7- Levels of enjoyment the Tour of Britain on the day of the event



Source: Q7a: How enjoyable you have found the Tour of Britain event today? (n=126)

Tour of Britain attendees were asked the extent with which they were satisfied with various aspect of the event and to rate each aspect using a scale ranging from a scale of 0 to 10, where 0 is extremely dissatisfied and 10 extremely satisfied.

Chart 8 -Satisfaction with individual aspects of the Tour of Britain



Source: Q6: How satisfied you have been with the following (n=126)

As can be seen from the chart above, the two aspects rated highest were the event’s ability to appeal to people of all ages and its entertainment value. The information available on the big screen received the lowest rating. The findings for 2009 are roughly in line with those from 2008.

The rest of this section gives detailed commentary on each aspect rated by attendees.

3.3.1 Having appeal for people of all ages

The event was perceived as having appeal for people of all ages, with eight in ten (79%) giving a rating of 7-10. One in five (19%) gave the event’s appeal for people of all ages a rating of 4-6 therefore thought the appeal was average. Just 2% gave the appeal for all ages a rating of 0-3, therefore thought it was poor. In 2008, three quarters (77%) of attendees

gave the event's ability to appeal to people of all ages a rating of 7-10. Therefore, perceptions of this aspect of the event remain unchanged.

3.3.2 The entertainment value

Seven in ten (71%) gave the entertainment value a rating of 7-10 thus indicating that they were satisfied with this aspect of the event. A quarter (24%) felt this aspect of the event was average. Just 5% gave a rating of 3 or below (poor). In 2008, the entertainment value was given a rating of between 7-10 by seven in ten (70%) people. Again, perceptions of this aspect of the Tour of Britain event remain unchanged.

3.3.3 Facilities available for the public

Over half (56%) of people attending the event gave the facilities available for the public a rating of between 7-10 thus indicating that they were satisfied. A third (32%) of people gave the facilities available to the public a rating of 4-6, (average). One in eight rated the facilities as poor. In 2008 (55%), a similar proportion as in 2009 gave the facilities available to the public a rating on 7 or above.

3.3.4 The availability of refreshments

A third (33%) of attendees gave the availability of refreshments a rating of between 7-10 and four in ten (40%) gave an average rating of 4-6. A quarter (24%) gave the refreshments a poor rating of 0-3. The availability of refreshments was rated higher in 2008, with just fewer than half (46%) giving a rating of 7 or above. This equates to a 13% drop in satisfaction in 2009.

3.3.5 Information available on the big screens

Around one in five (22%) were satisfied with the information available on the big. Over a quarter (27%) thought the information was average and just over a third (35%) rated it as poor. Seven in ten of those who attended the event reported that they had not seen the screens. Therefore, for the majority, the rating of the information available on the big screens is based on no prior knowledge. This aspect of the event was not rated in 2008.

Around one in seven (16%) thought that the screens had a positive impact on their overall enjoyment of the event. Two per cent of event attendees reported that the screens had a negative impact on their overall enjoyment. Seven in ten (71%) event attendees had not seen the big screens.

When asked for ways in which the Tour of Britain could have been improved as an event for spectators, a quarter (26%) of the event attendees indicated that the screens could have been improved. It is worth noting that seven in ten people attending the event had not seen the screens therefore this improvement could be as a result of people not seeing the screens and not necessarily on content.

One in five (19%) felt that better publicity/more advertising would have improved the Tour of Britain as an event for spectators. One in eight (13%) cited more food/refreshment as a way with which the event could have been improved. One in ten (9%) thought the running commentary could have improved the event for spectators. Other areas of improvement are mentioned by 7% or fewer people attending the event.

3.4 Bicycle use

The Tour of Britain event attracted a high proportion of cyclists. Eight in ten (80%) of those attending the event lived in a household with access to a bicycle. The number of people saying they cycle (76%) is in line with that for 2008 where three quarters (74%) of those who attended the event reported that they cycled.

Around four in ten (38%) people attending the event cycle to work everyday and another one in ten (11%) cycle at least once a week. Four in ten (43%) do not cycle to work. Cycling for pleasure was more popular, with one in five (22%) saying they do so everyday. Additionally, nearly six in ten (57%) cycle at least once a week.

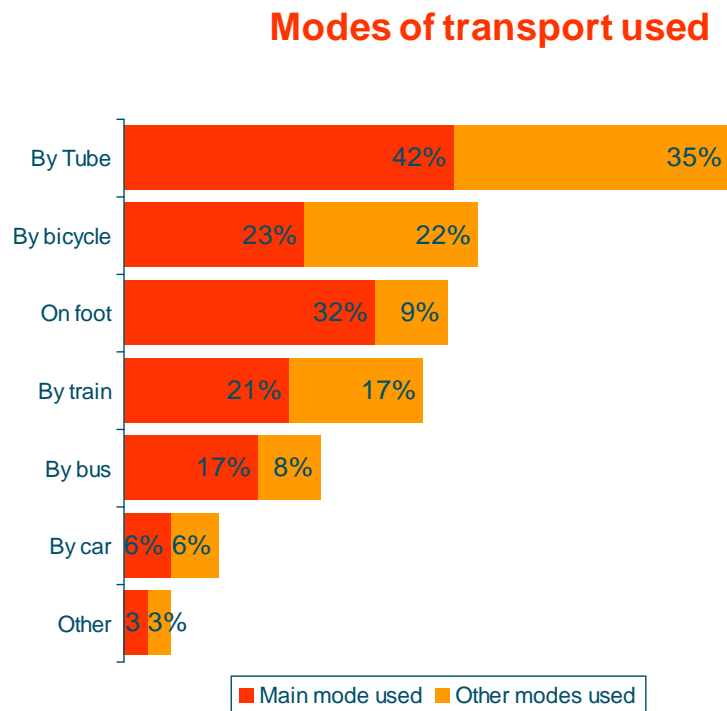
Three in ten (30%) Tour of Britain attendees reported that they cycled more in the summer of 2009 than they have done in previous summers. One in twelve (8%) took up cycling after a period of absence and 1% were completely new to cycling. Six in ten (57%) people reported that their cycling remains unchanged from previous summers. Just 3% of people indicated that they are cycling less than in previous summers.

Although there are no significant differences between 2009 and 2008, it is worth noting that the proportion saying they cycle less is lower in 2009 (3%) than it was in 2008 (11%).

Nearly a half (47%) of Tour of Britain attendees thought that such events are likely to motivate them to cycle more, and for those not already doing so, to take up cycling. However, a quarter (23%) did not think that they would be encouraged. In 2008 a similar proportion (47%) felt that events like the Tour of Britain would encourage them to cycle more or to take up cycling.

4 Appendix

Mode of transport used



Source: Q2a: Which of the following modes of transport did you use to get to the event today? (n=126)
Q2b: Which of the following modes of transport was the main mode which you used to get to the event today? (n=126)

4.1 Profiles

	Pre Event Totals	Event Totals
Total Number of interviews (unweighted base)	509	126
	%	%
Ethnicity		
White	70	87
BAME	28	13
Age		
16-24	15	9
25-44	44	57
45-64	25	26
65+	16	7
Gender		
Male	49	77
Female	51	23
Social Class		
AB	34	38
C1	32	42
C2	10	11
DE	18	6