

KANTAR PUBLIC

THINK! Cycling Evaluation 2016



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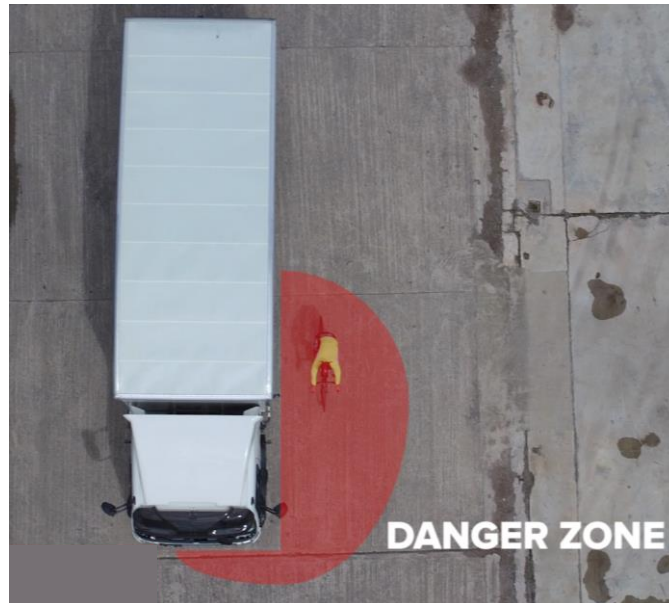
Introduction

Campaign: what?

New campaign aimed at reducing the number of cyclists killed and seriously injured in collisions with HGVs

HGVs are disproportionately more likely to be involved in a pedal cyclist death: between 2011 and 2015 they were involved in approximately one quarter of deaths despite comprising only 5 per cent of traffic in Great Britain. The most common manoeuvre is when an HGV is making a left turn.

A THINK! campaign therefore aimed to raise awareness of the 'danger zone' among cyclists and HGV drivers.

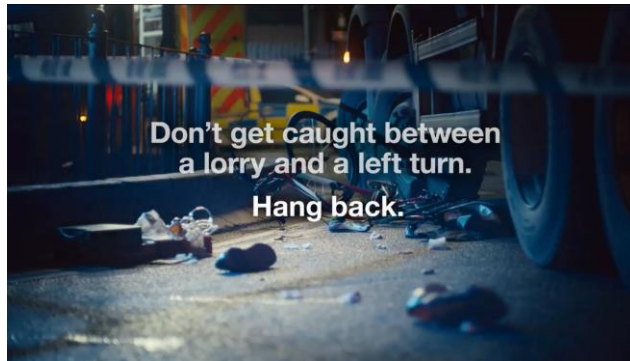


Campaign: who?

The campaign specifically targets **urban commuter cyclists** aged 25-44 (who are overrepresented in cycling fatalities involving HGVs), and **HGV drivers** in London and Manchester (cities with the highest cyclist casualty rates involving HGVs).

Advertising was used to communicate with cyclists, using the message ‘Don’t get caught between a lorry and a left turn – Hang back’, and partnerships were used to connect with HGV drivers. This evaluation focuses on the impact of the paid-for advertising activity.

Facebook / YouTube ad






Poster ad



Campaign: how?

Facebook and YouTube-led campaign supported by Outdoor advertisement (OOH) in London and Manchester. A film was co-developed with The Global Cycling Network (GCN) retargeting people on Facebook who had seen the main campaign video.

	Activity	Spend	Start date	End date
 	Facebook, YouTube	£75k	26 th September	23 rd October
	OOH 6 Sheets	£54k	26 th September	9 th October
	OOH Bus Rears	£46k	3 rd October	16 th October
	GCN Video Production	£20k	26 th September	23 rd October
	Total media	£195k		

Methodology

Approach: online survey among cyclists in London and Manchester pre- and post-campaign to measure attitudes, knowledge, awareness, message take out and claimed behaviour.

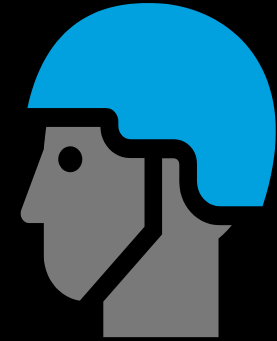
Sample Size: 400 in London and 100 in Manchester at each wave. Post-wave data were weighted to match the demographic profile of the pre-wave sample for accurate comparison.

Fieldwork dates:

- Pre wave: 30th June – 5th July 2016
- Post wave: 24th – 28th October 2016

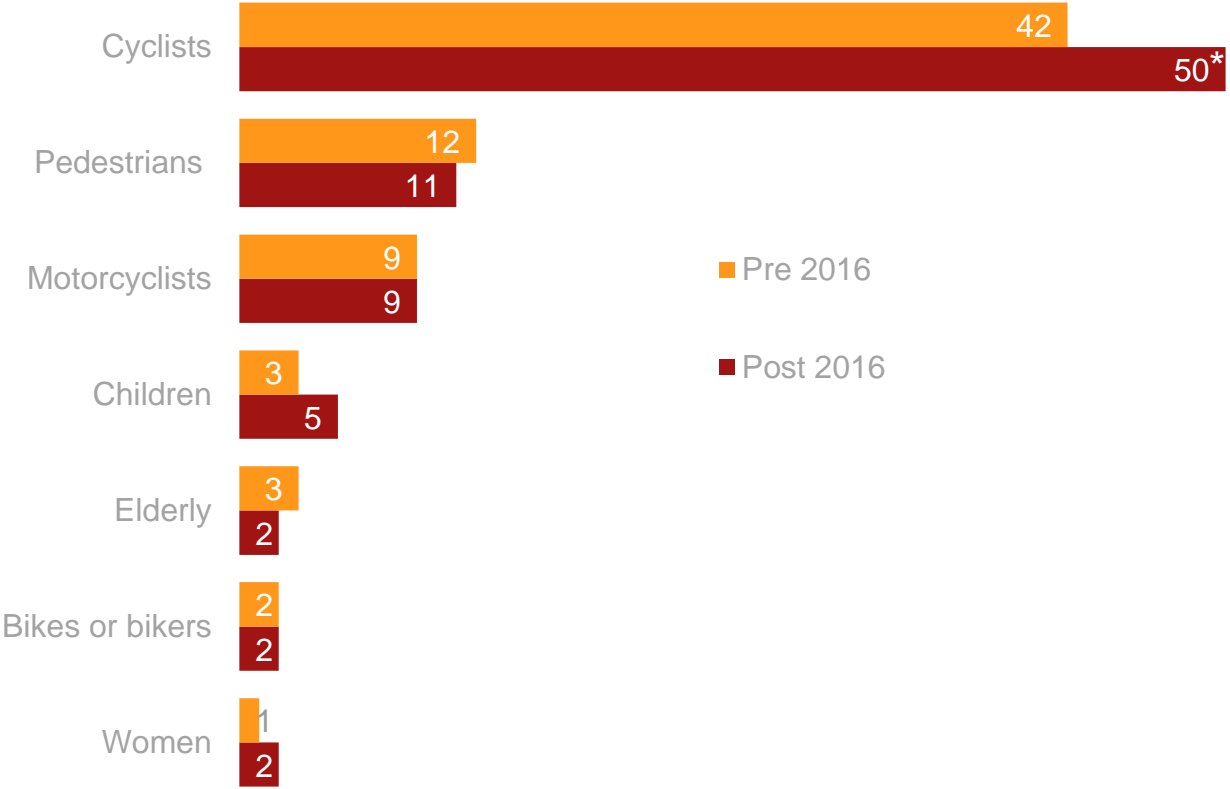
Throughout the presentation * is used to denote a statistically significant difference

2 Perceptions of cycling safety



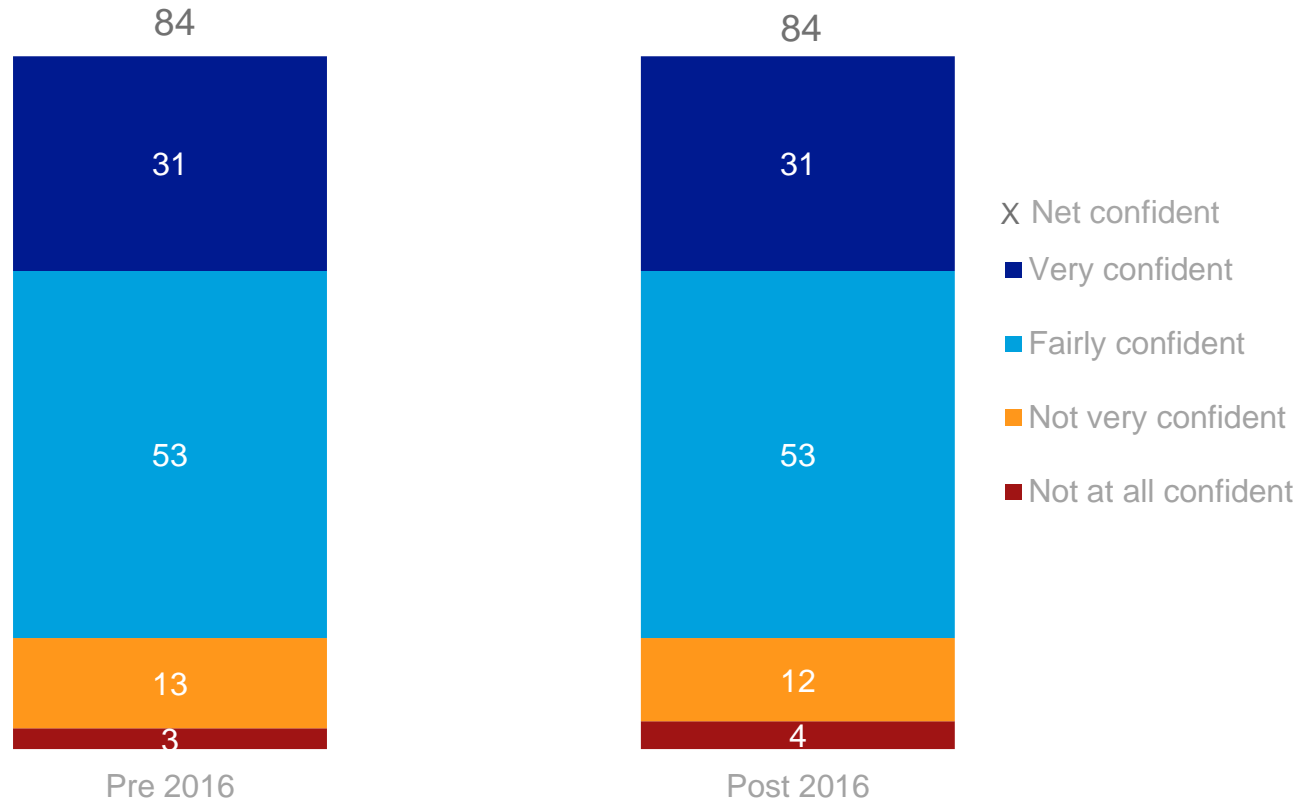
Overall, cyclists see themselves as the most vulnerable road users, and this increases following the campaign to half of cyclists

% spontaneously saying most vulnerable



Despite this perceived vulnerability, confidence in cycling on the roads is relatively high – with one in three cyclists considering themselves very confident

% selecting ...

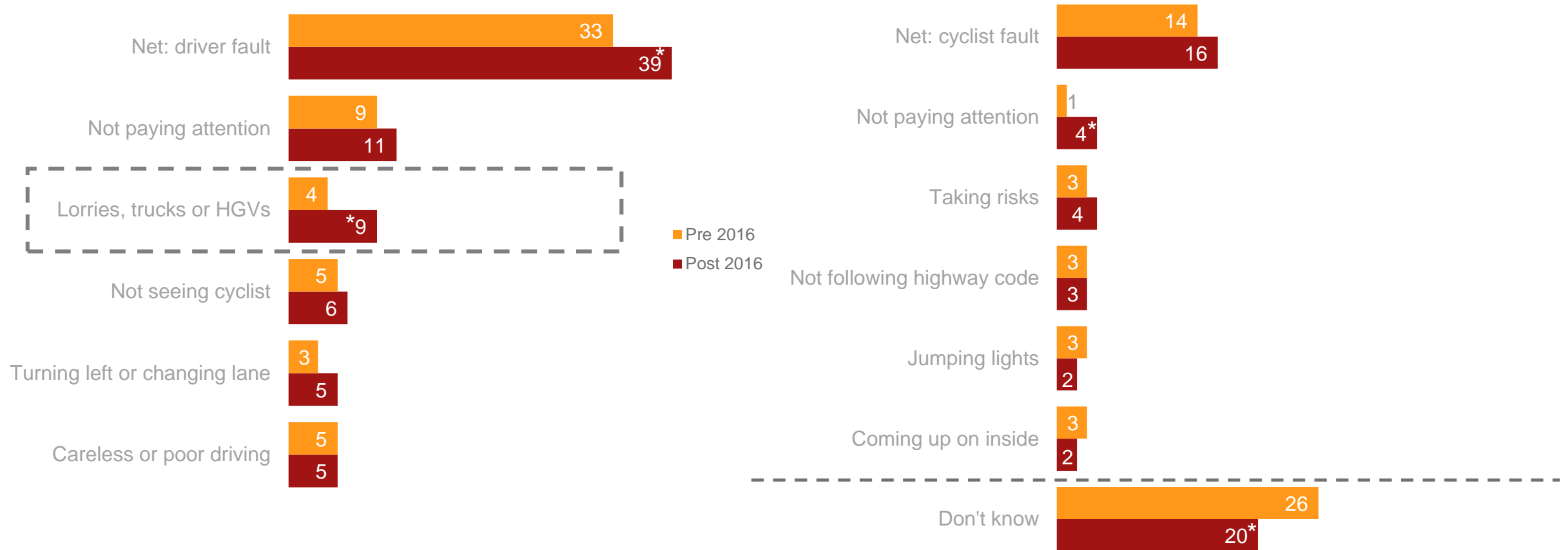


Men more confident than women

Net confident (post)
Men: 89%
Women: 77%

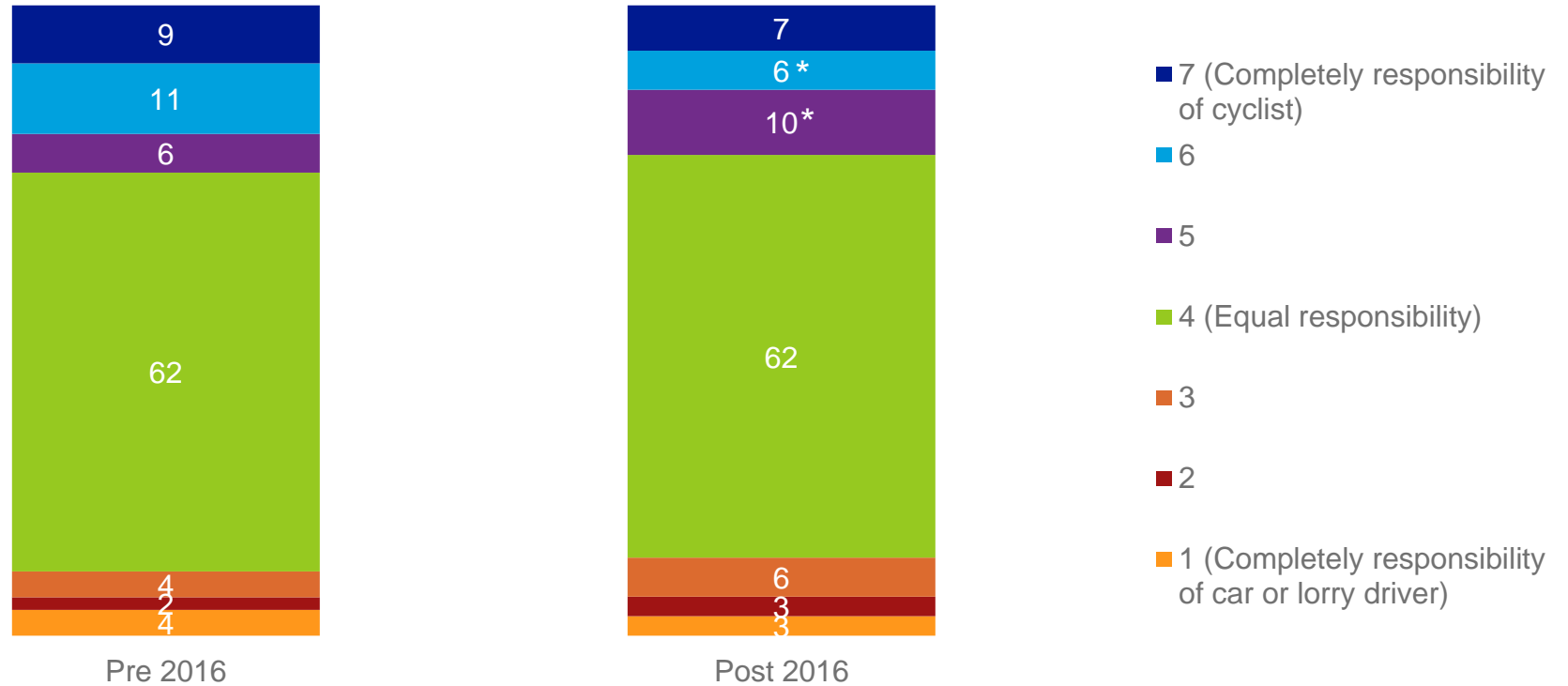
Reflecting perceptions of vulnerability, cyclists are most likely to say that drivers cause cycling accidents – this increased at the post stage, driven largely by an increase in those attributing lorries and HGVs as the cause of accidents

% saying spontaneously ...

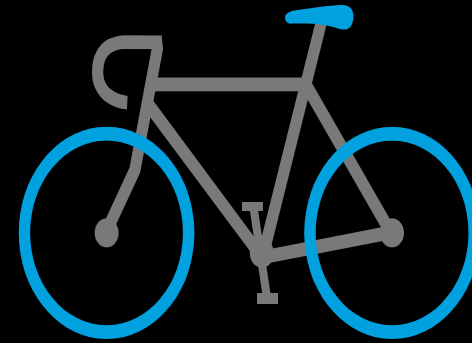


The majority said it is equally the responsibility of both drivers (car and lorry) and cyclists for preventing accidents

% saying responsibility for preventing accidents is ...

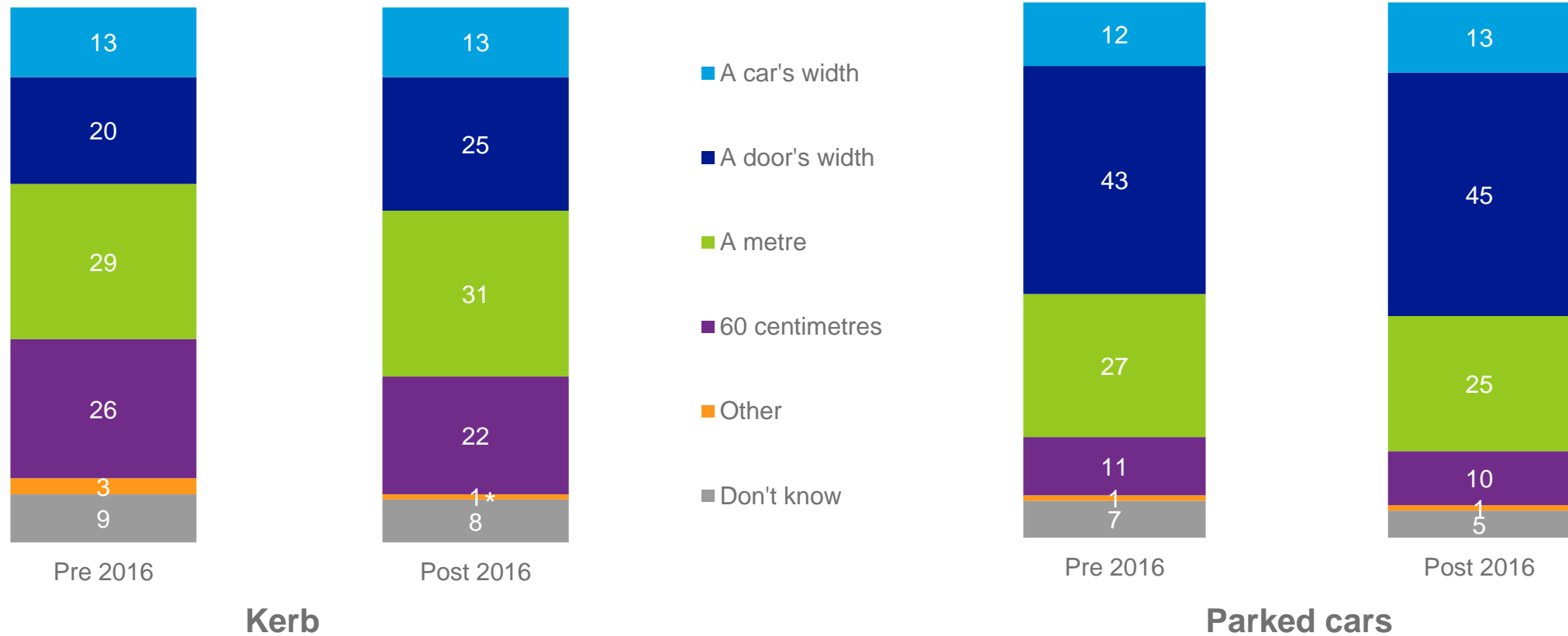


3 Reported cycling behaviours



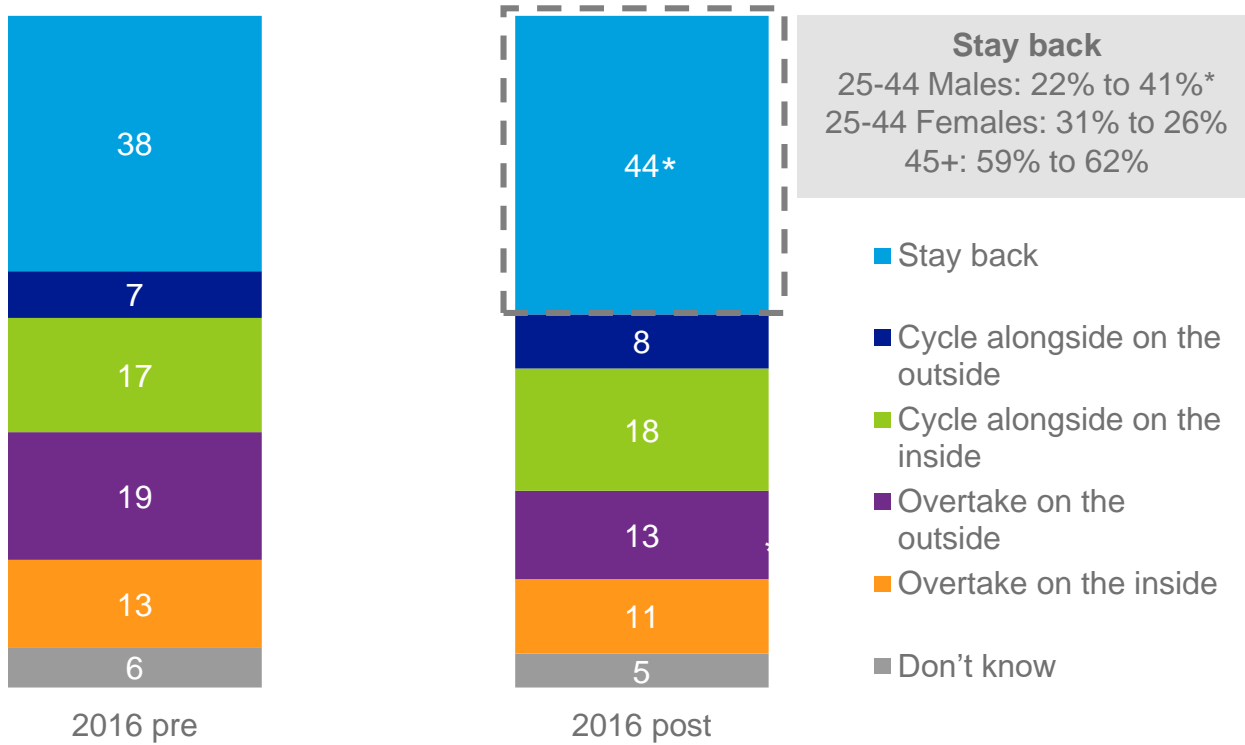
There were no significant differences from pre to post stage in perceptions of broader cycling behaviours, such as how much space to leave between the kerb or parked cars

% selecting different positions in relation to...



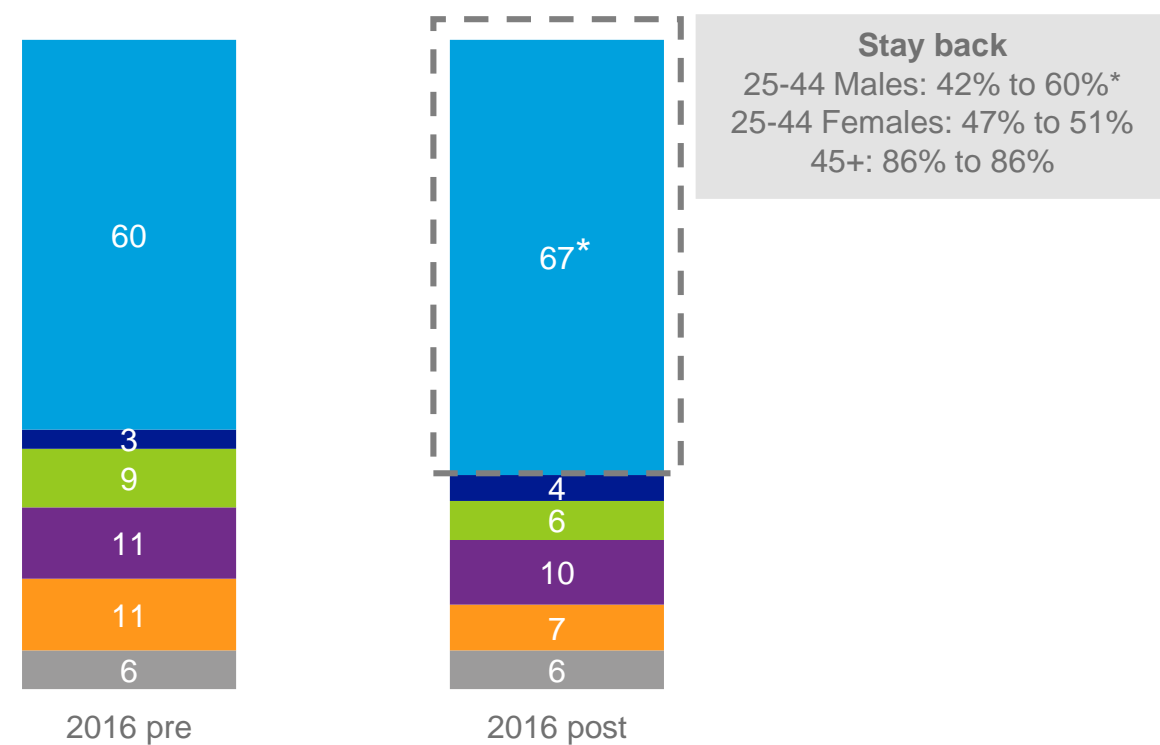
However, there were significant changes to reported behaviours in relation to approaching a junction, with cyclists more likely to say hanging back is the best thing to do and this was driven by the target group of males aged 25-44

% in relation to other traffic



Other traffic

% in relation to trucks and lorries



Trucks and lorries

This caution regarding HGVs is reflected in the small proportion who considered Position E below to be dangerous compared to more than seven in ten who said the same for Position B or D. Also significant reduction in those viewing position E as very dangerous post campaign

% selecting ... (ranking shown alongside)

1

Position B	Pre 2016	Post 2016
Dangerous (net)	74%	74%
Very dangerous	49%	50%

2

Position D	Pre 2016	Post 2016
Dangerous (net)	71%	74%
Very dangerous	45%	49%

5

Position E	Pre 2016	Post 2016
Dangerous (net)	21%	16%*
Very dangerous	11%	8%



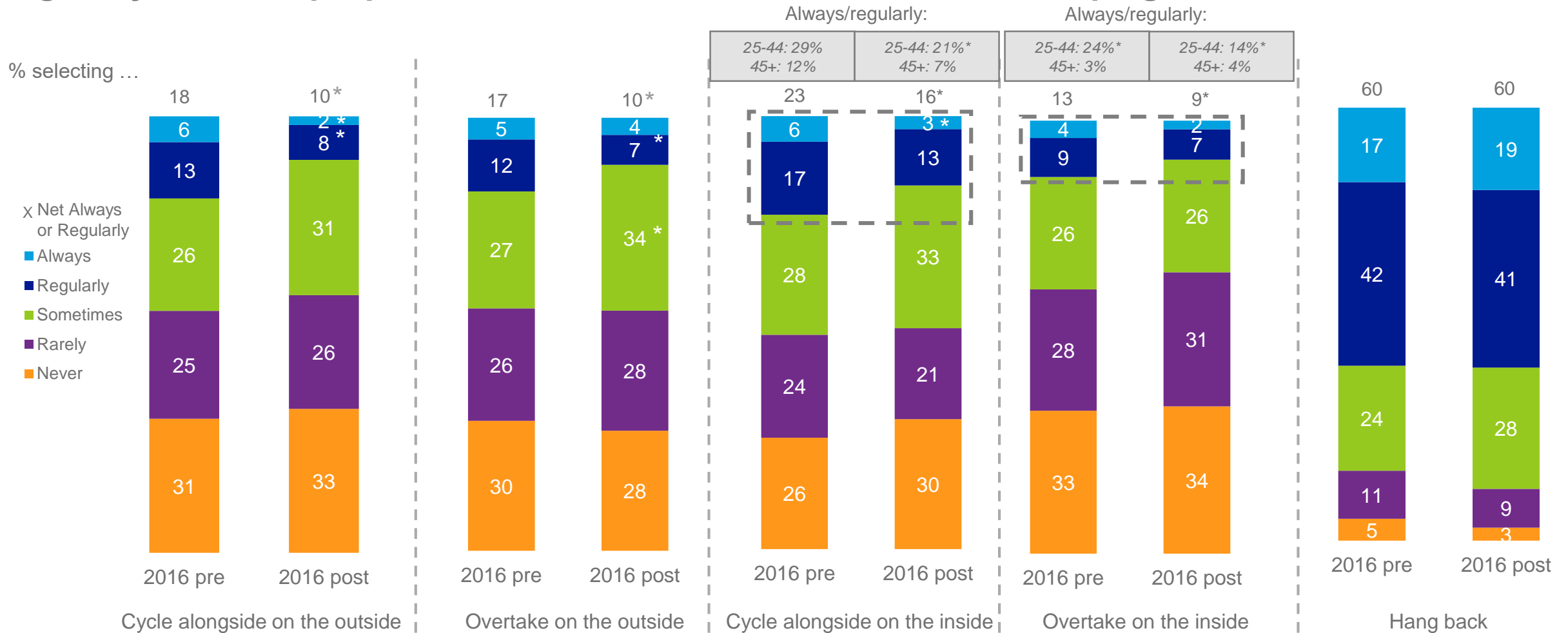
Position A	Pre 2016	Post 2016
Dangerous (net)	41%	38%
Very dangerous	26%	23%

4

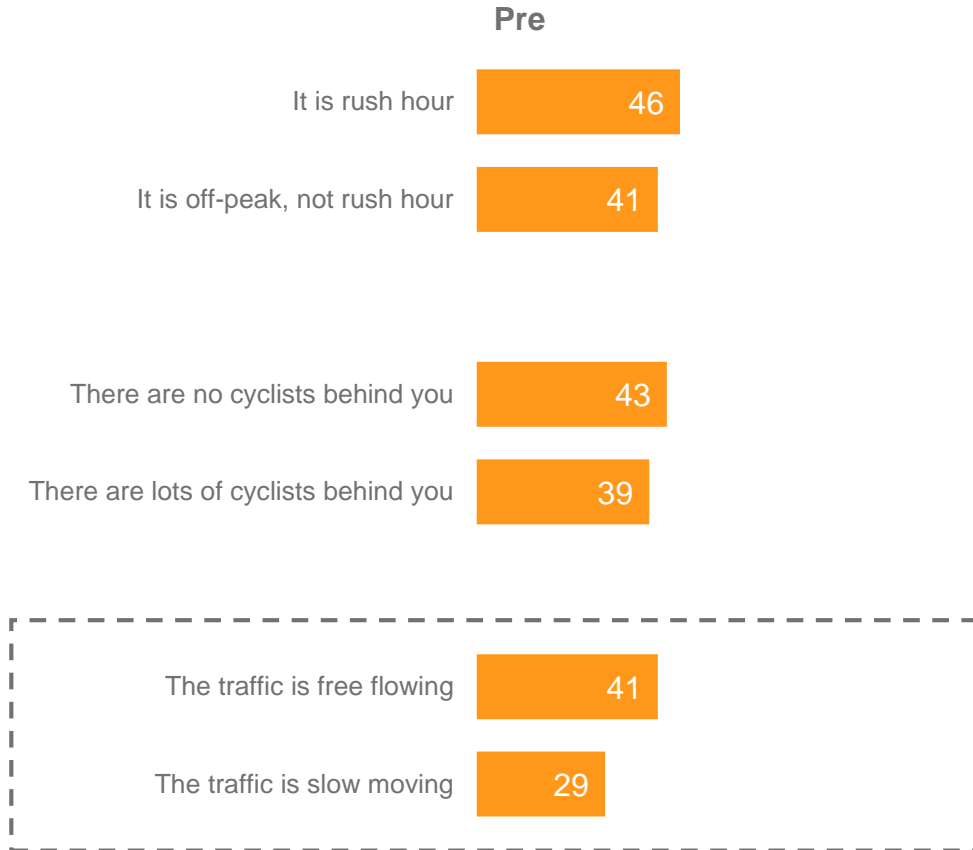
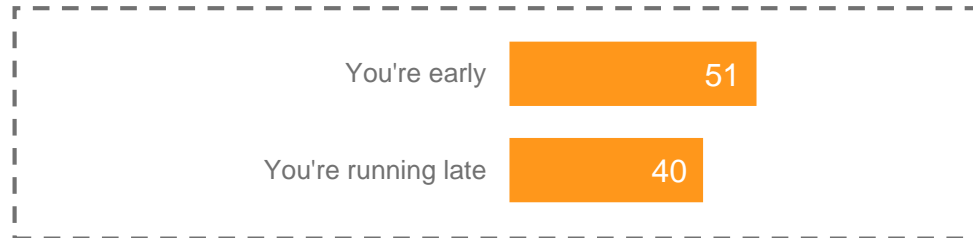
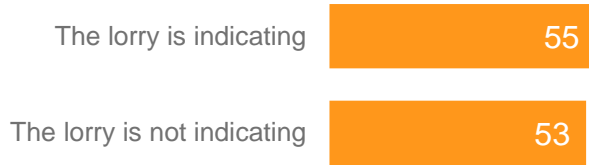
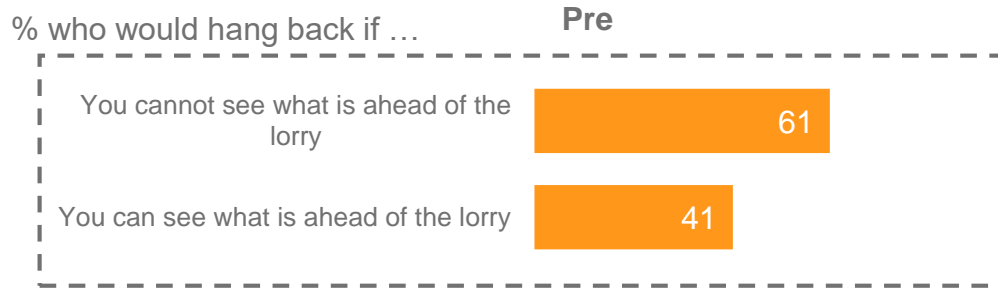
Position C	Pre 2016	Post 2016
Dangerous (net)	57%	55%
Very dangerous	28%	28%

3

Similarly the majority of cyclists do not report taking up those dangerous positions 'always' or 'regularly', and the proportion who do has declined across the campaign

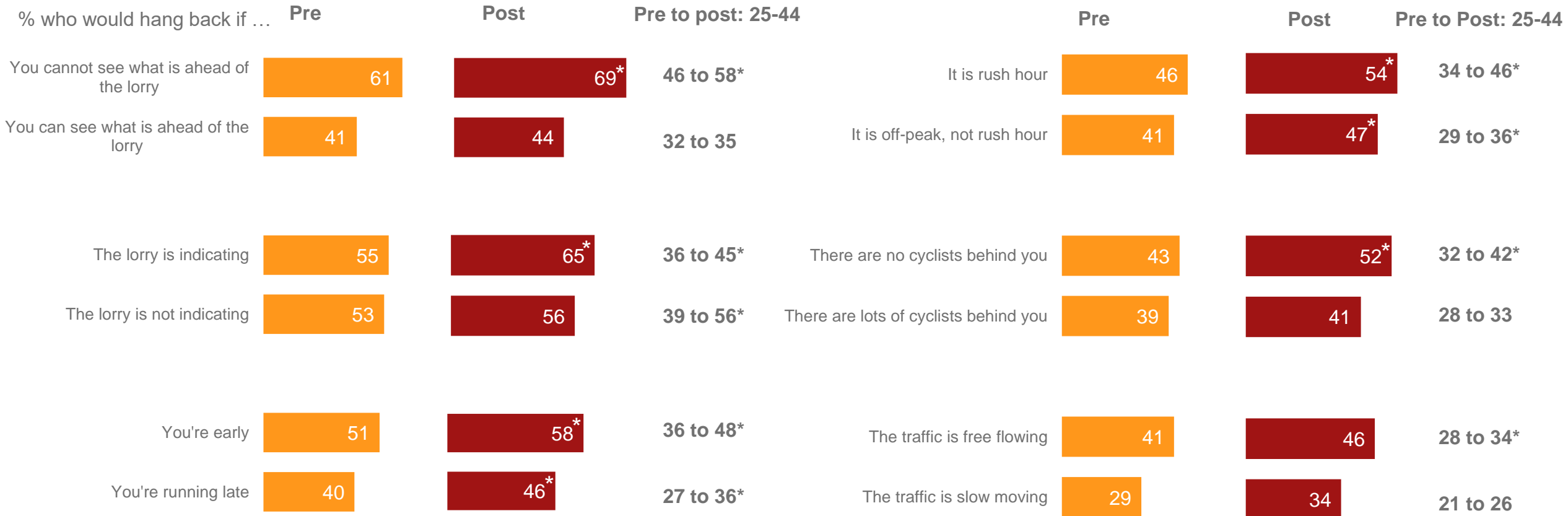


There are many different factors that can influence whether cyclists say they would hang back behind lorries – with ability or inability to see in front of the lorry making the greatest difference, alongside other factors like lateness



Q14. Imagine you are cycling on the road and there is a truck or lorry approaching the same junction as you. We're now going to introduce several factors which may or may not affect what you do. For each, please indicate what you would do.
 Base: All respondents. (2016 Pre stage 573; 2016 Post stage 500)
 Significant difference pre 2016/ post 2016 (*)

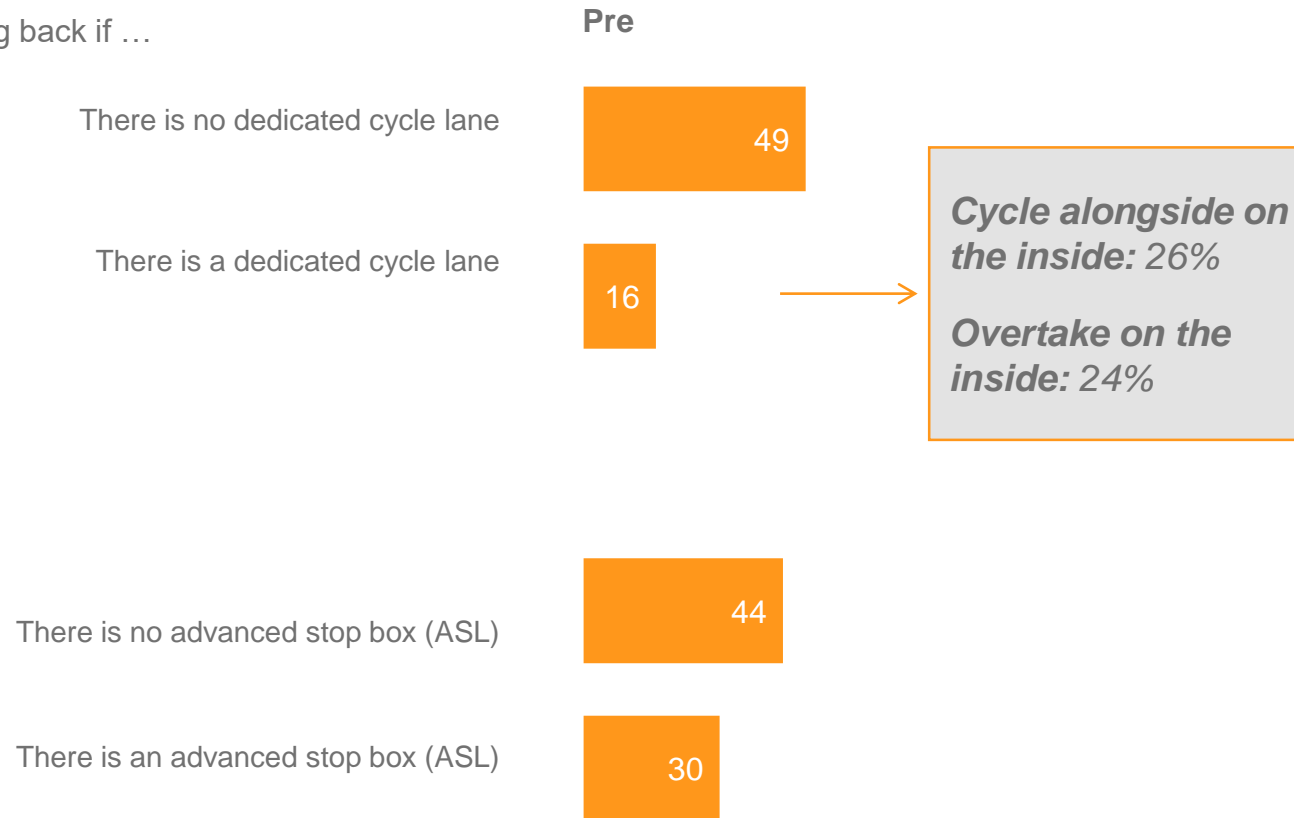
After the campaign, cyclists are more likely to report hanging back on almost every measure



Q14. Imagine you are cycling on the road and there is a truck or lorry approaching the same junction as you. We're now going to introduce several factors which may or may not affect what you do. For each, please indicate what you would do.
 Base: All respondents. (2016 Pre stage 573; 2016 Post stage 500)
 Significant difference pre 2016/ post 2016 (*)

Hanging back is the most common choice in all circumstances, except if there is a dedicated cycle lane

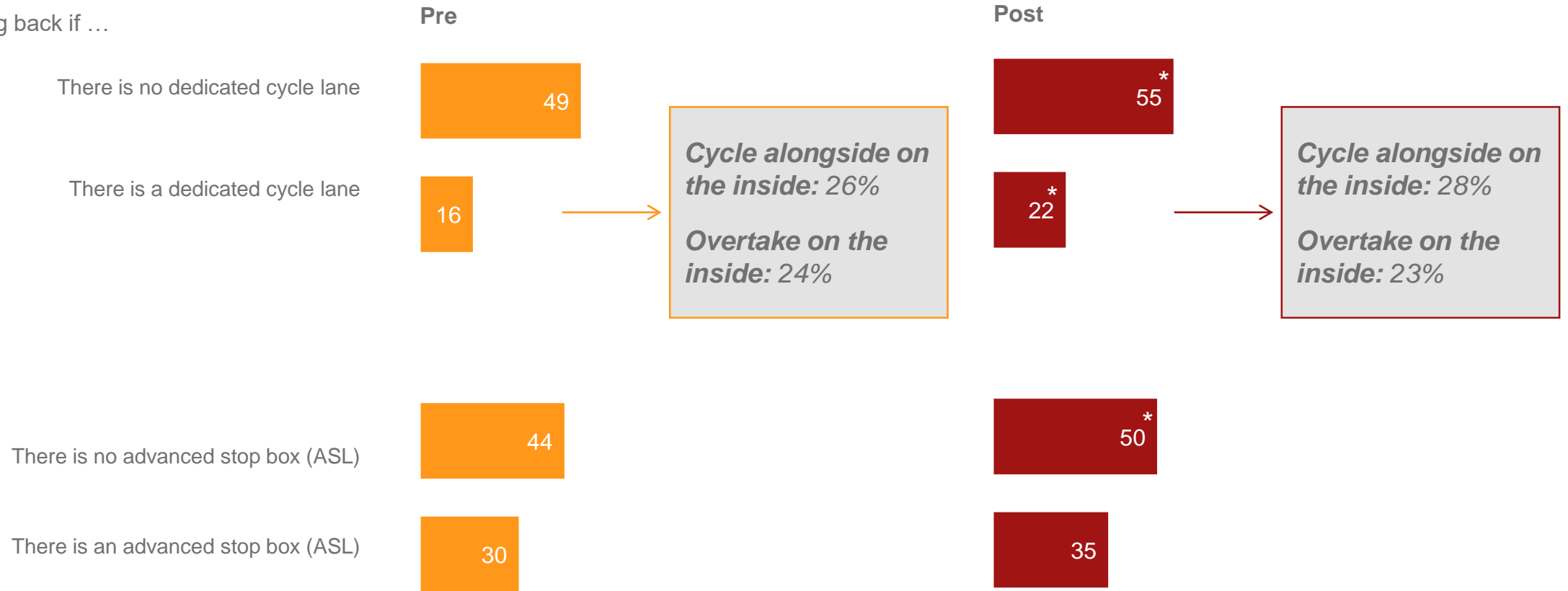
% who would hang back if ...



Q14. Imagine you are cycling on the road and there is a truck or lorry approaching the same junction as you. We're now going to introduce several factors which may or may not affect what you do. For each, please indicate what you would do.
Base: All respondents. (2016 Pre stage 573; 2016 Post stage 500)
Significant difference pre 2016/ post 2016 (*)

Although these scenarios do see some improvement at the post stage, cyclists are still more likely to say they would cycle or overtake on the inside than to hang back if there is a dedicated cycle lane

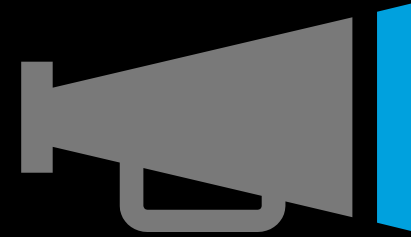
% who would hang back if ...



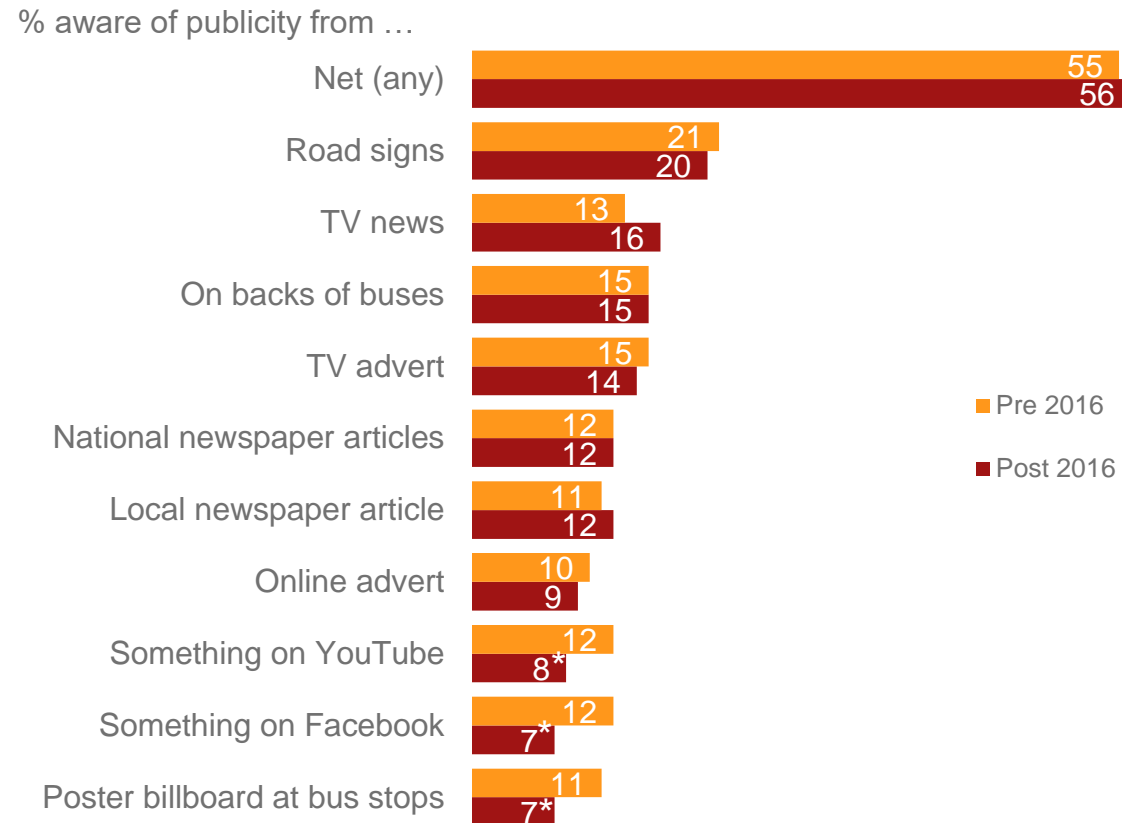
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 Base: All respondents. (2016 Pre stage 573; 2016 Post stage 500)
 Significant difference pre 2016/ post 2016 (*)

4

Campaign awareness, take out and response

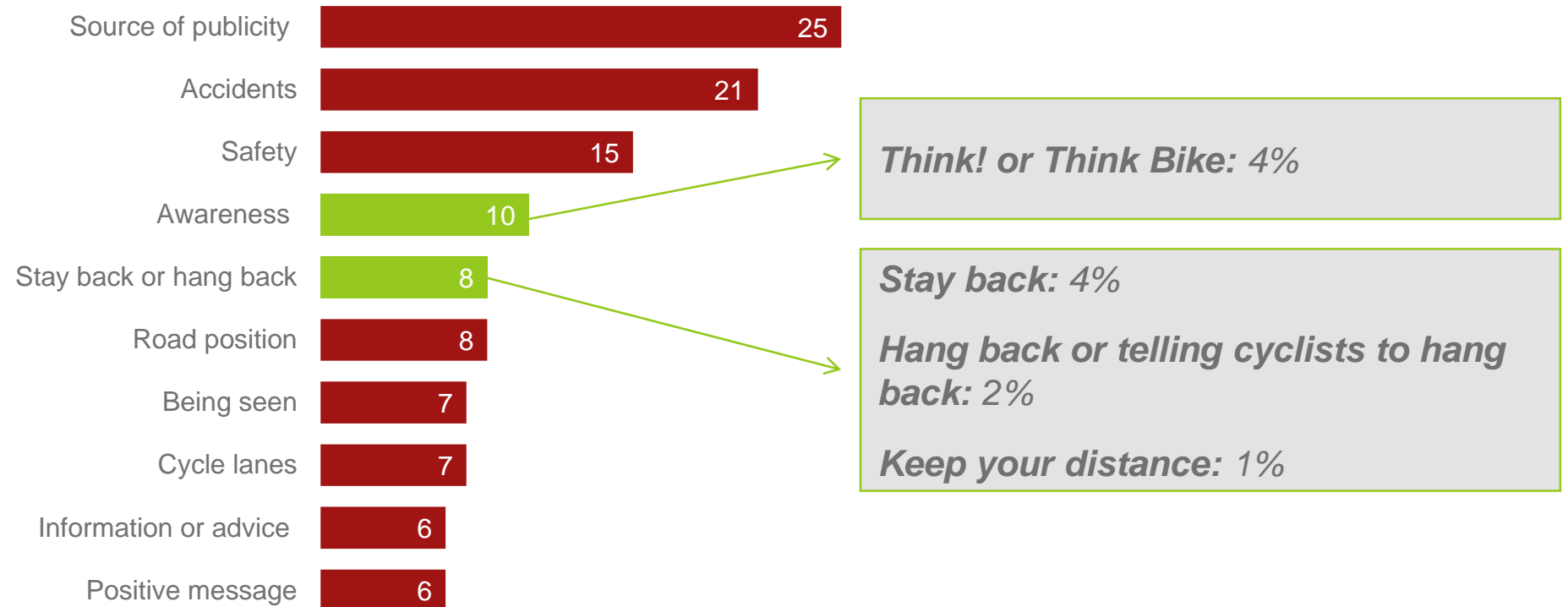


Understandably, awareness of cycling issues among cyclists was high at the pre stage and remained high, with road signs the most commonly reported source of awareness



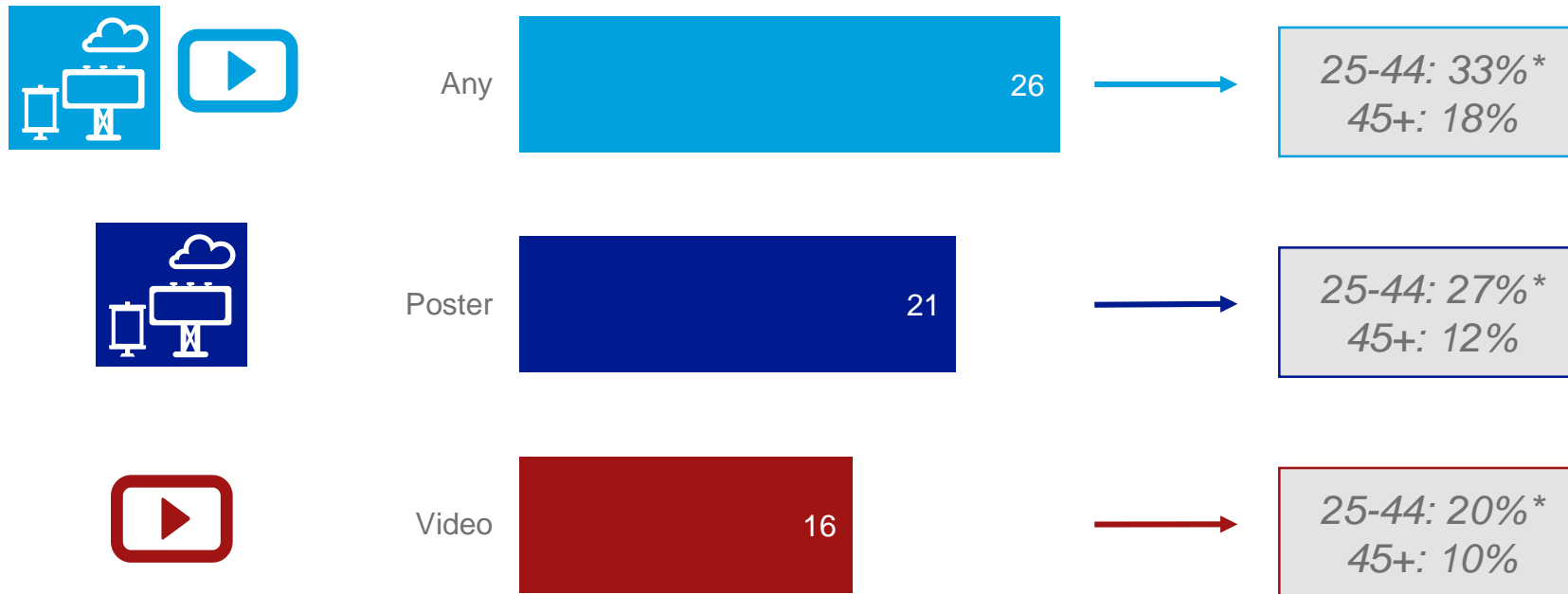
Cyclists were most likely to have seen publicity relating to accidents and other general messages around safety and awareness of surroundings. However, there was some spontaneous recall of stay back or hang back messages following the campaign

% (Nets)



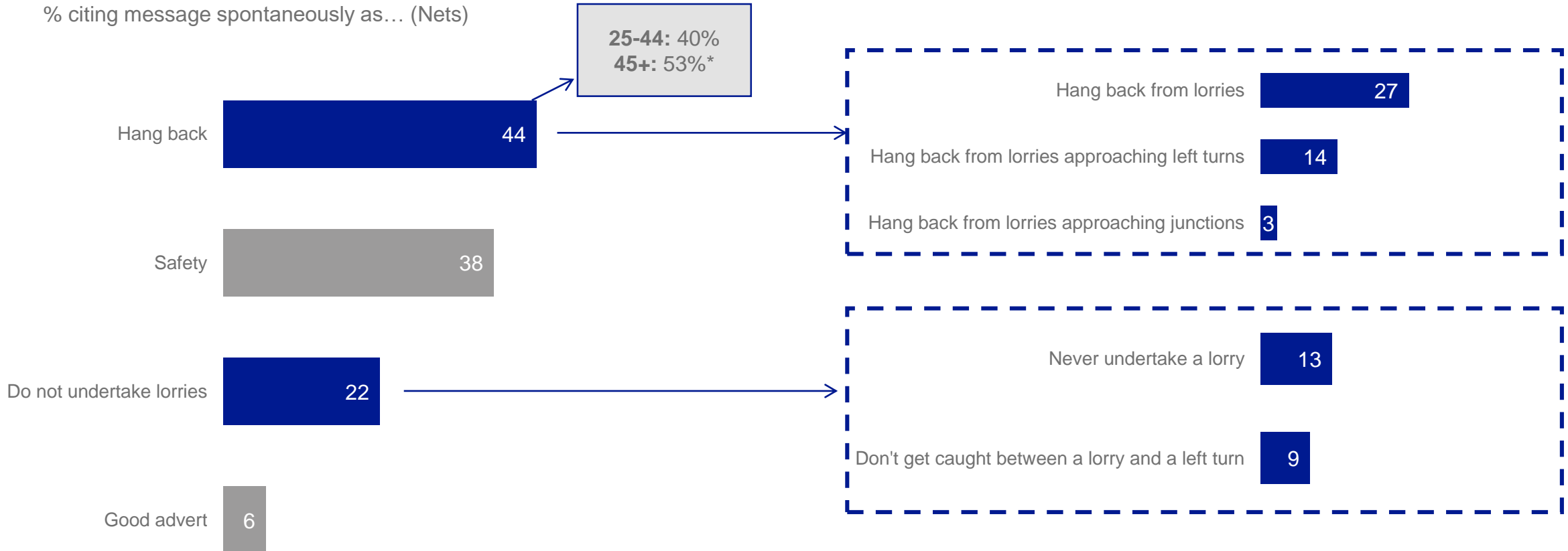
1 in 4 cyclists had seen 1 of the ads, with the poster having higher levels of recognition than the video, with the target age group also more likely to recognise the ads.

% recognising...



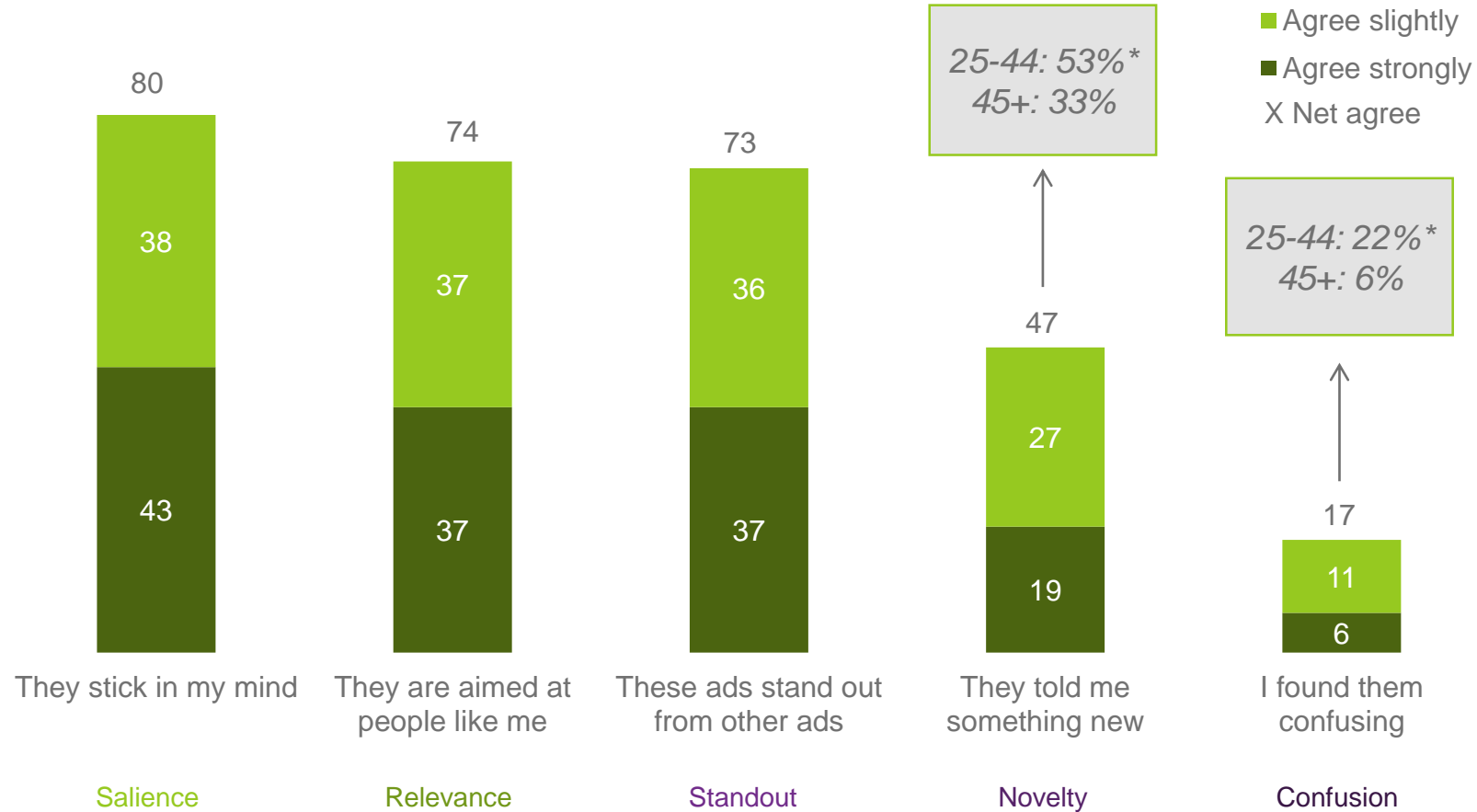
Cyclists were most likely to take out the overall 'hang back' message in relation to lorries specifically, while 1 in 5 took out the 'don't undertake lorries' message.

% citing message spontaneously as... (Nets)



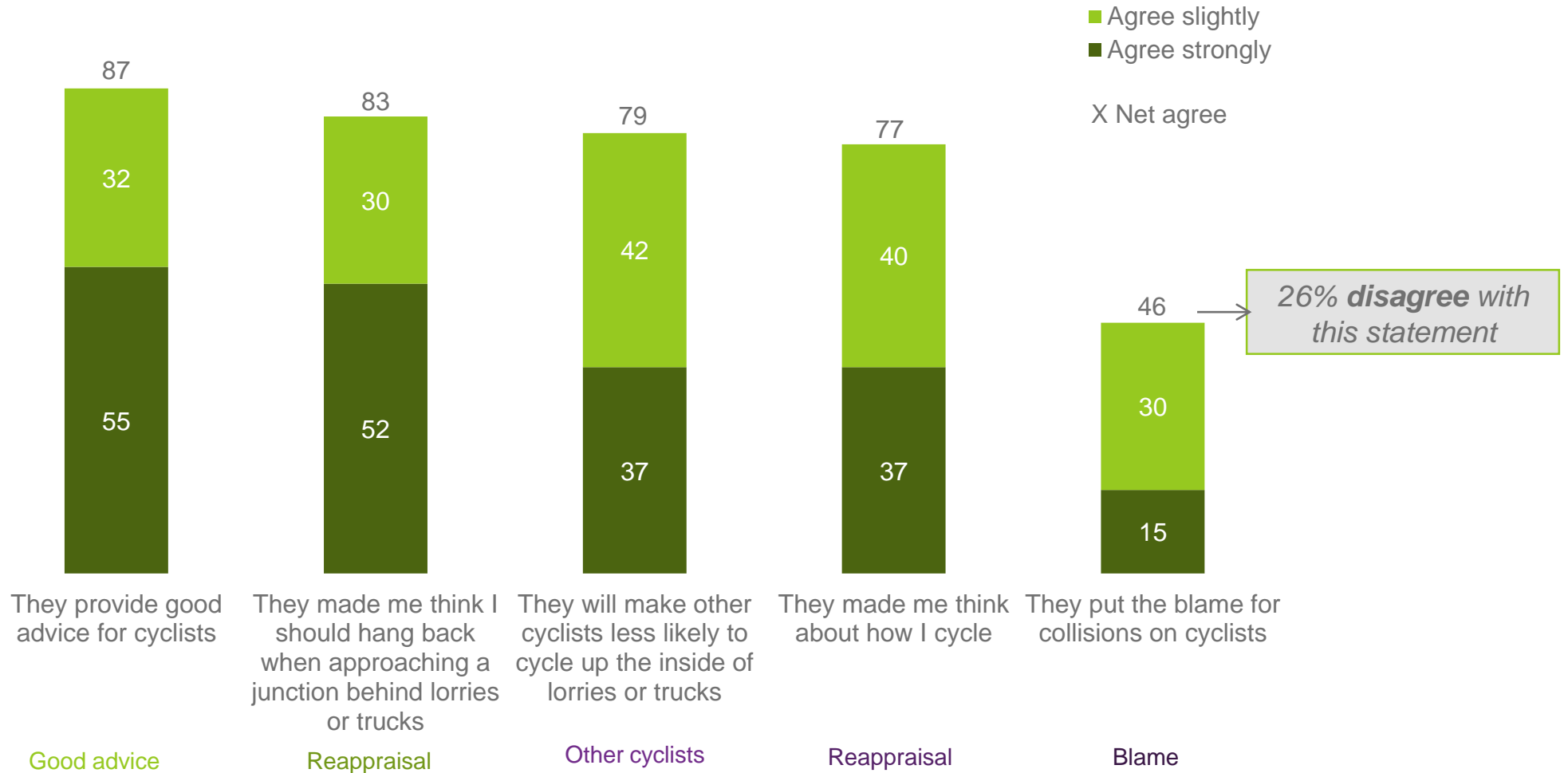
The ads performed well on salience, relevance and standout – just under half of cyclists agreed they offered ‘new news’ and very few said they were confusing.

% agree (Net) for ads in 2016



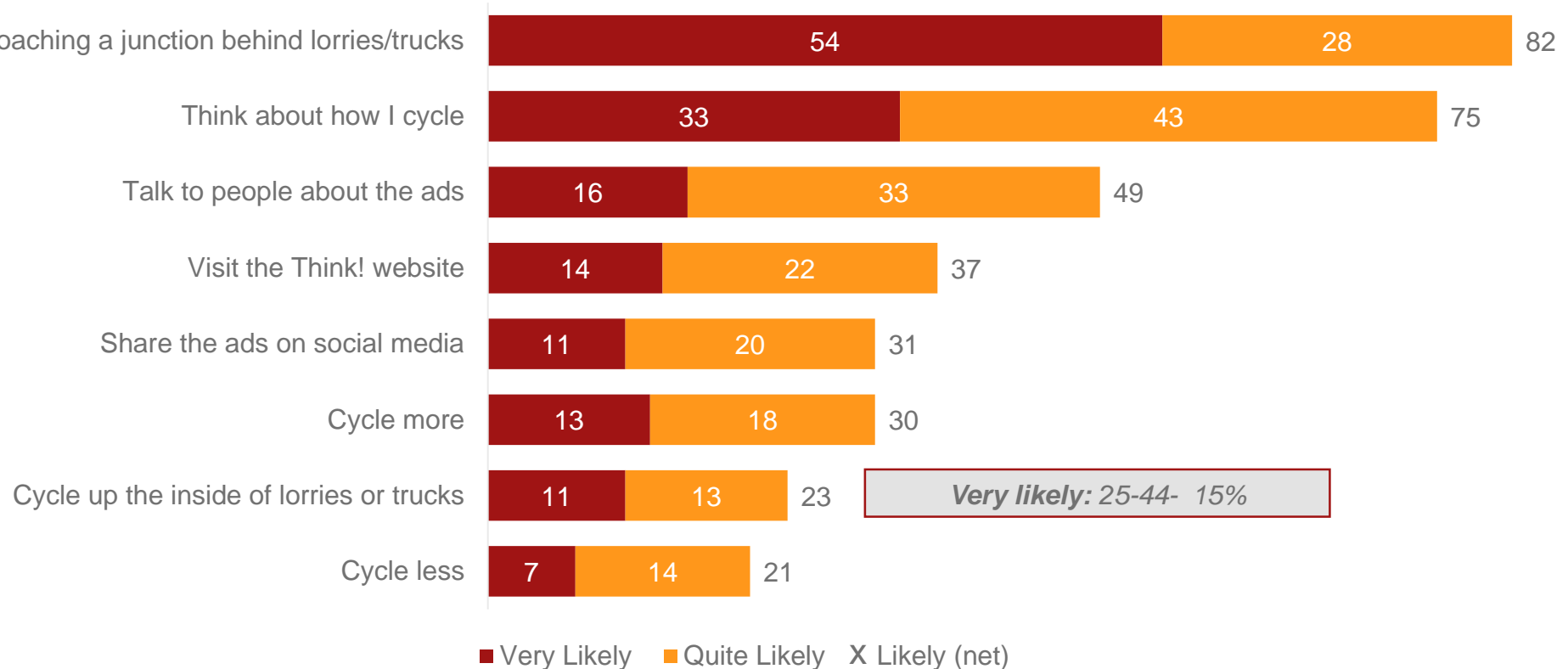
The vast majority of cyclists also agreed the ads gave good advice and made them re-appraise their own cycling behaviours. Importantly, fewer than half agreed the ads put the blame for collisions on cyclists

% agree (NET) for ads in 2016



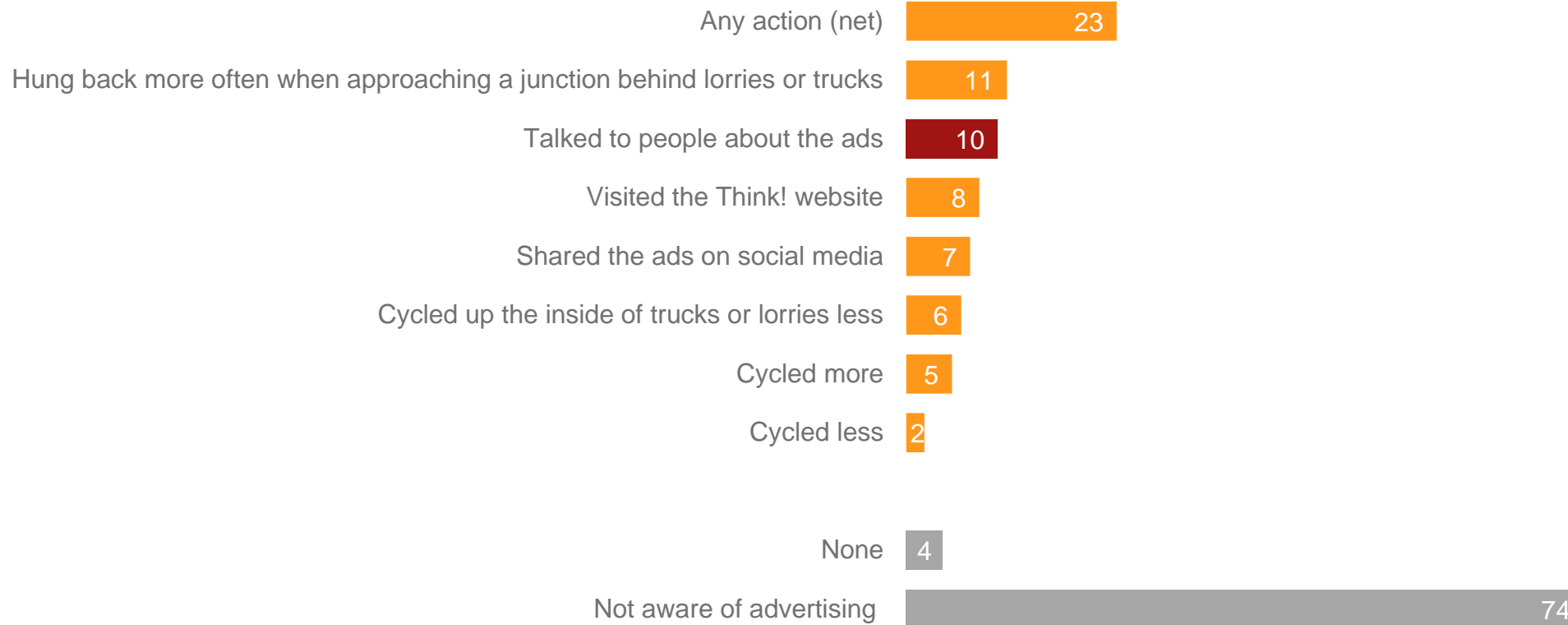
The vast majority of cyclists said they were likely to hang back behind lorries after seeing the ads. The ads also had a reasonable level of ‘talkability’ and ‘sharability’, with minimal negative impact as only one in five say they would be likely to cycle less

% likely to ... after seeing ads



1 in 5 cyclists claimed to have taken action after seeing the ads (nearly all of those who recognised the ads), with the most common action being hanging back more often when approaching junctions behind HGVs

% selecting ...

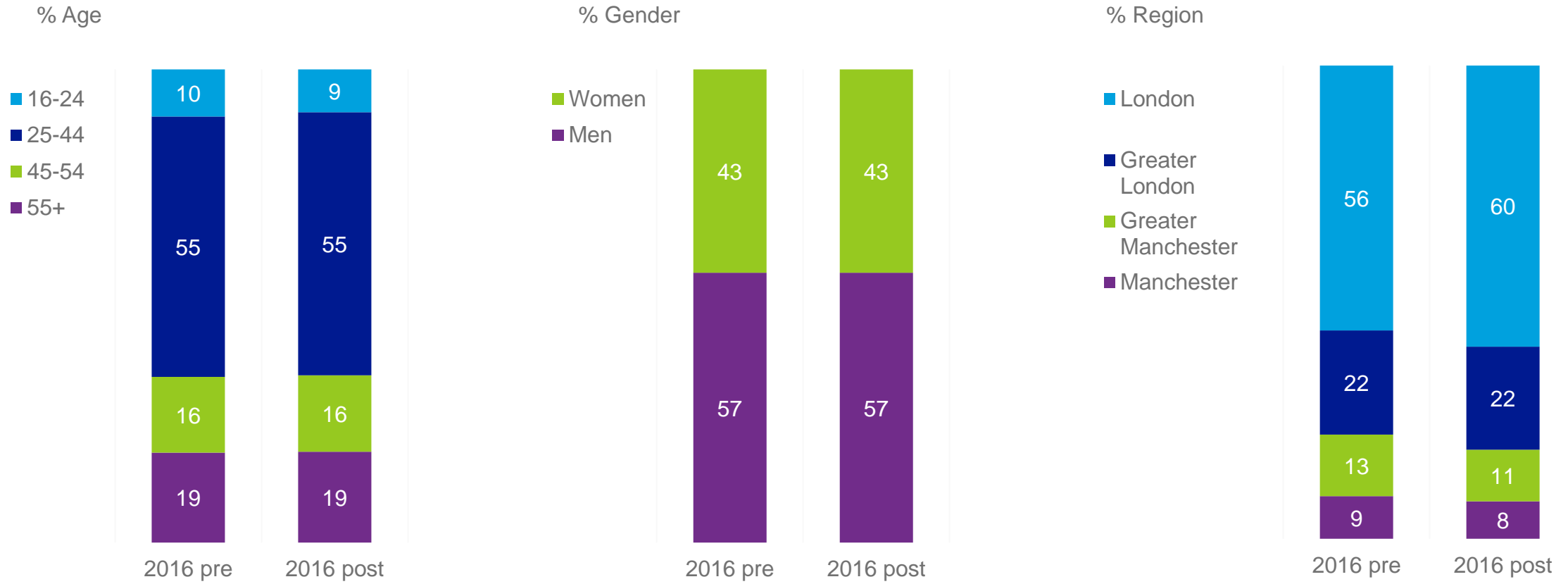


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Appendix

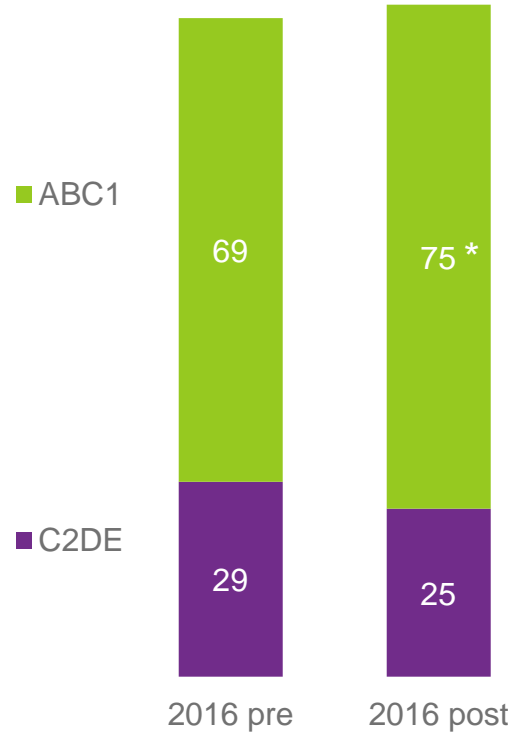
Demographics and additional metrics

Demographics (after weighting at post stage to match by age and gender profile of pre stage)

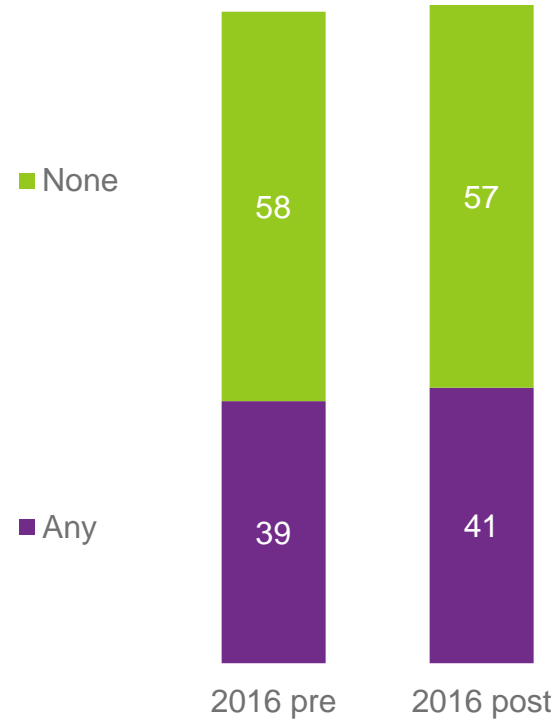


Demographics (after weighting at post stage to match by age and gender profile of pre stage)

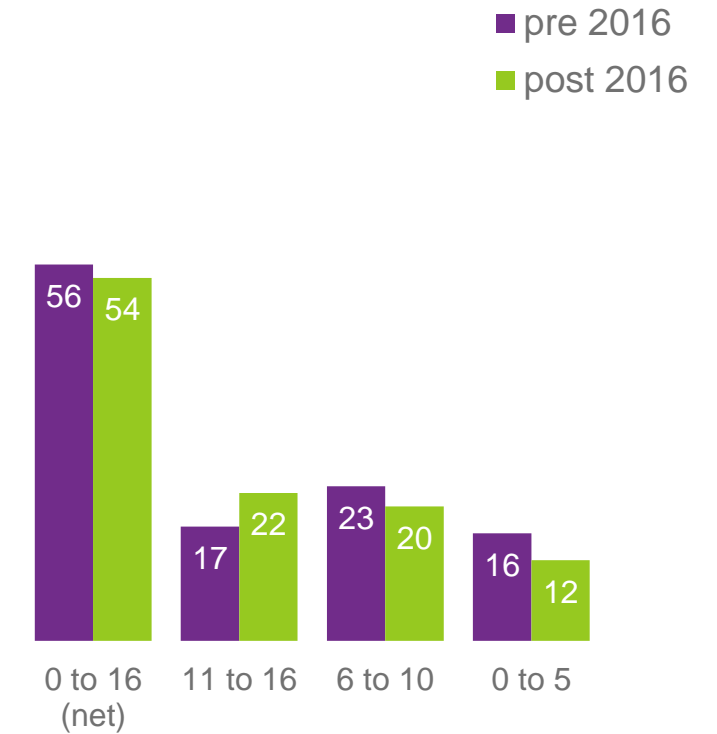
% Social grade



% Kids in household

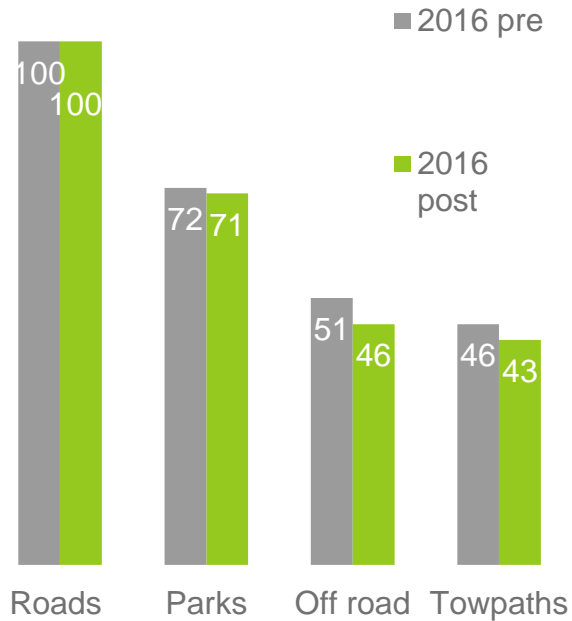


% Age of kids in household

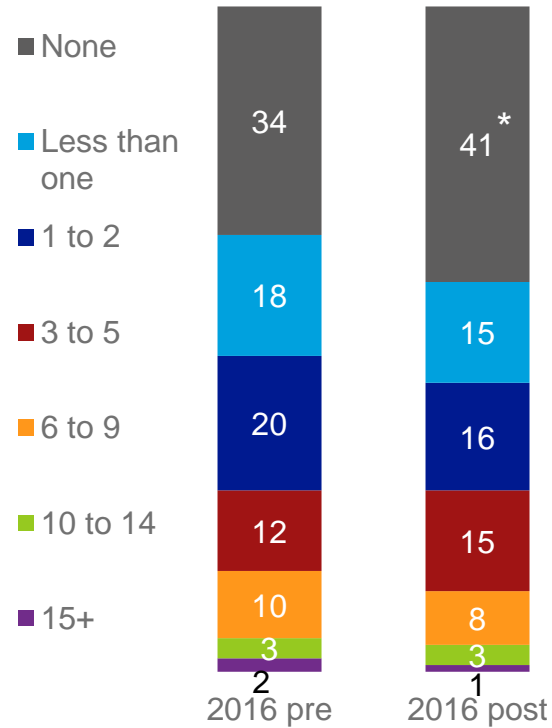


Cycling behaviours

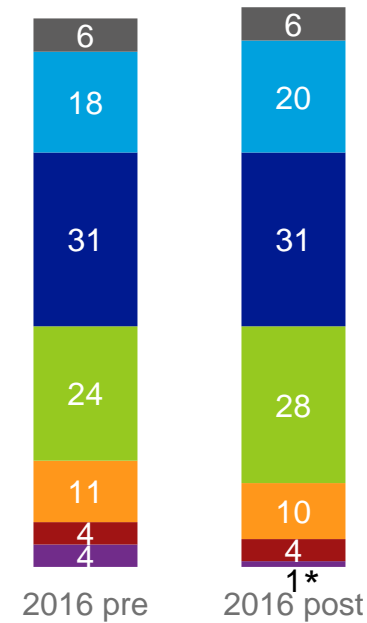
% Where cycle



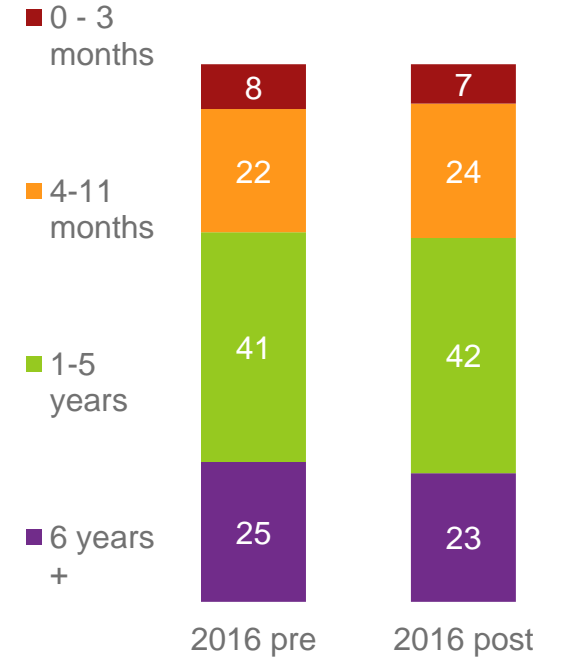
% hours spent ...
... riding bicycle to work



% hours spent ...
... riding bicycle for other reason

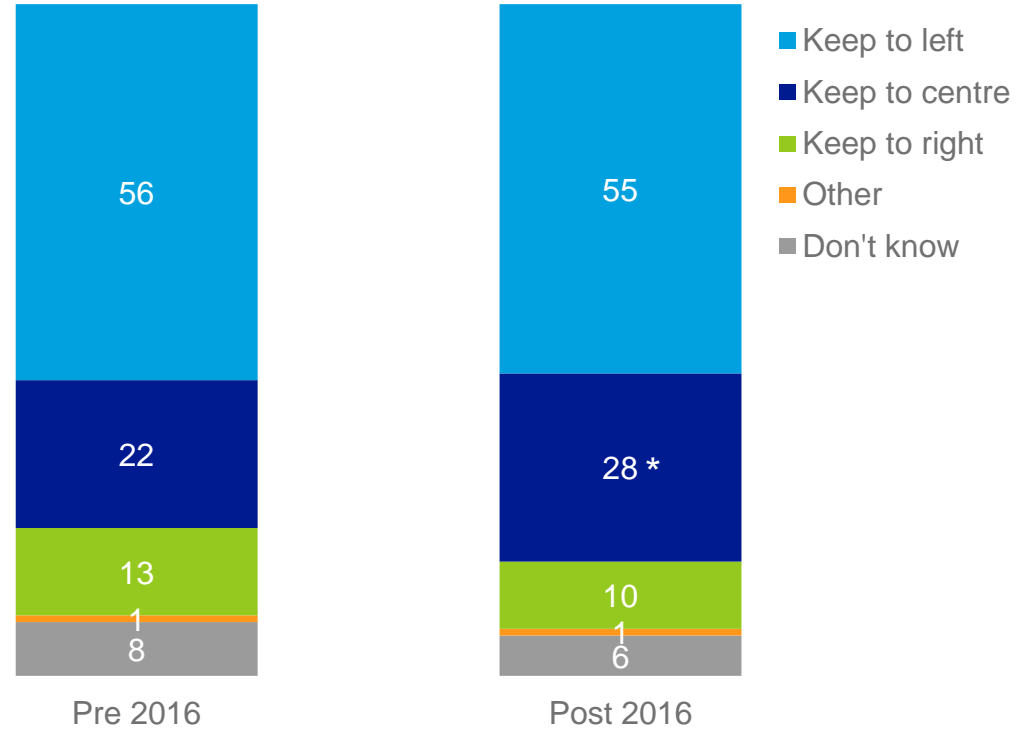


% how long been cycling to work



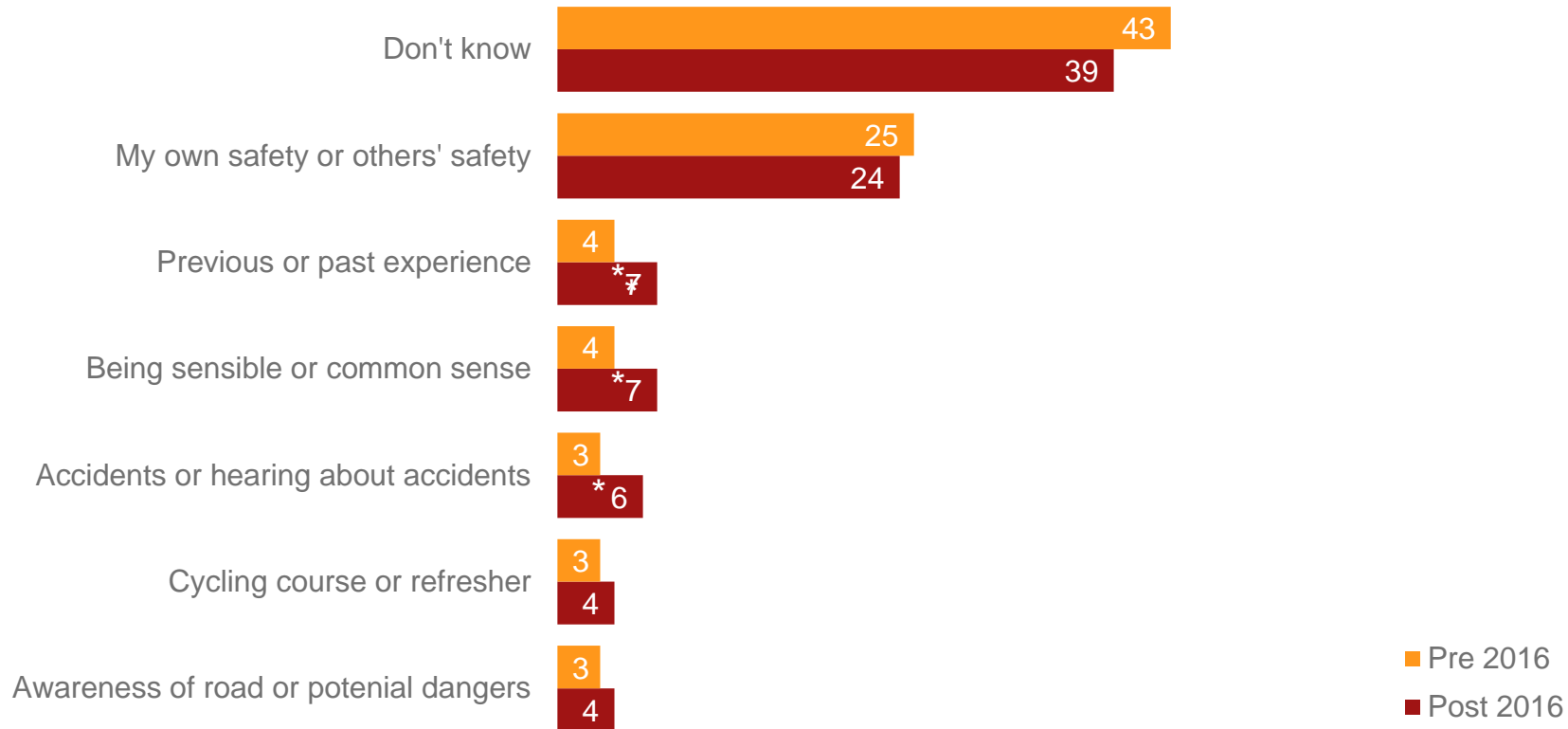
Cycling position on narrow roads

% selecting ...



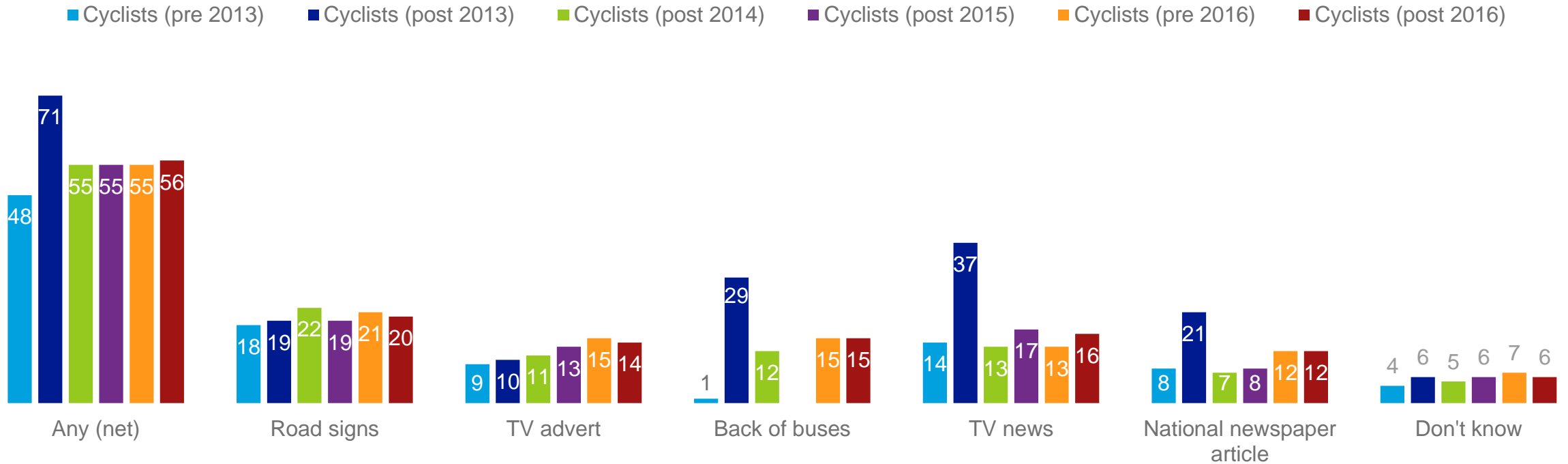
Reason for thinking about cycling behaviours

% saying spontaneously reason was ...



Awareness of cycling publicity – stable from previous two years, driven by road signs, TV ads, bus ads and the news

% aware of publicity in ...



Vulnerable road users still seen to be cyclists even when prompted

% saying most vulnerable after prompting

