

# THE 'OLYMPIC CYCLING EFFECT'

A REPORT PREPARED FOR  
SKY AND BRITISH CYCLING  
SEPTEMBER 2012



## **APPROACH**

The continued successes of Team GB's cyclists have been mirrored by an increasing participation in cycling in the UK, but little research exists quantifying its possible influence. This paper attempts to bridge this gap, incorporating both secondary and primary research, with the latter carried out before and after the London 2012 Olympics via a nationally representative sample. This measured the impact of London 2012 on cycling in the UK across a number of key variables: participation, consumer spending and factors inspiring the UK to take embrace two-wheels. The 'before and after' results were compared to assess if the 'Olympic Effect' appeared to be influencing these elements of UK cycling.

## **SUMMARY**

This research is one of the first attempts to measure the 'Olympic Cycling Effect' of Team GB's medal winning success in the build up to and post London 2012. This includes measuring the potential impact from increased participation by existing cyclists, the up-take by inspired new groups, and increased consumer spending and support for better cycling facilities across the country. The results indicate a significant up-lift in the number of non-cyclists who have been motivated to take up the activity as a result of Team GB's golden summer. This appears to be particularly evident amongst parents willing to support their children in taking up cycling. Another consistent theme emerging throughout the research has been the increased level of cyclists across all segments taking up the activity for fun with family and friends, providing further evidence that elite sporting success has increased awareness of cycling: a pre cursor to influencing participation.

The report indicates that the 'Olympic Cycling Effect' is well positioned to have a lasting positive influence on participation, with wide support evident for the sustained growth of cycling in the UK. With an increasing number of UK businesses and organisations also helping to make cycling part of the fabric of everyday life, this report supports a new reality that, thanks in no small part to the 'Olympic Cycling Effect', cycling is now a mainstream activity in the UK.

### ***"A FRESH BOOST FOR BRITAIN'S CYCLING MARKET"***

The 'Olympic Effect' appears to have influenced multiple aspects of UK cycling, including retail sales, which have been a visible indicator in the lead up and during the London 2012 Olympic and Paralympic Games.

Halfords, the UK's largest cycle retailer, reporting a 5.7 per cent increase in like-for-like sales from cycling in the first quarter of 2012, driven by Premium and Children's Bikes.<sup>1</sup> Preceding this, Tesco reported a 130 per cent increase in bicycle sales following the 2008 Beijing Olympics, Team GB's medal success, and the 'feel-good' factor that ensued thereafter as the London 2012 Games approached.<sup>2</sup> The overall market is forecast to increase by around 5 per cent in 2012, propelled by shifting purchase patterns and 'the Team GB effect', including continued sporting cycling success preceding the Games.

Twenty eight per cent of all respondents indicated that the Olympic Effect inspired them to acquire bikes and accessories in the lead-up to the Games. This effect was greatest amongst existing cyclists, as indicated in Chart 1.

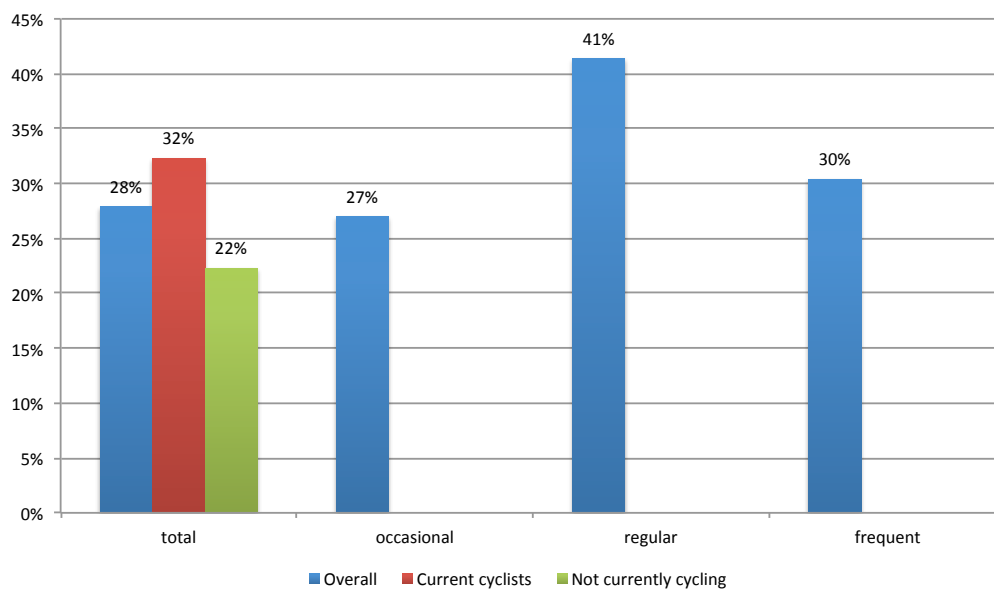


Chart 1: The Olympic Effect on bike and accessory purchases

Ten per cent more current cyclists bought bikes and accessories than non-cyclists, with almost one third influenced to do so. The effect was greatest amongst Regular Cyclists, with 41 per cent accounted for by this segment. This was followed by Frequent and Occasional Cyclists, with 30 and 27 per cent influenced to acquire bikes and accessories from these segments respectively. These results indicate that the Olympic Effect flowed through to cyclists' *purchasing* habits.

<sup>1</sup> <http://road.cc/content/news/56276-halfords-continues-grow-bicycle-sales-and-expects-olympic-boom>

<sup>2</sup> <http://www.guardian.co.uk/lifeandstyle/2012/jan/29/cycling-boom-olympics>

Retailers such as Cycle Surgery, with 28 UK shops, reported a 'record turnover week' for road bikes for the second week of the Olympic Games,<sup>3</sup> whilst some of the largest online bike retailers such as Wiggle reported UK traffic to its site leap by 71 per cent during the Olympic period,<sup>4</sup> and online store Very.co.uk reported a 73 per cent jump in sales of bikes to women as a result of the Olympic Effect.<sup>5</sup> Other online sites such as Gumtree.com saw bike searches leap by 34 per cent in the last week of the Games.<sup>6</sup> Evans Cycles, one of the UK's largest bike chains reported a 35 per cent surge in sales and website traffic following Bradley Wiggins' Tour de France win in the lead up to the Olympics, citing sports cyclists as being responsible for the biggest increase in bike sales in the £700-2,000 range.<sup>7</sup> These figures for elite cyclists do not reflect average prices however. Halfords, another of the UK's largest bike chains reported that the lead up to the Games, saw sales of its Boardman and Carrera Tour De France road bike increase by 12 and 18 per cent respectively.<sup>8</sup> Overall, it appears that the Olympic Effect, driven by cycling successes in the lead-up to the Games, and the subsequent cycling medal tally, continue to assist the sale of bikes and accessories, with some adjustments made by portions of the cycling segments for the recession.

### ***"TO TOUR AND TO WATCH"***

The UK cycle tourism market was worth an estimated £635m per annum in 1997, with no accurate figures appearing to exist subsequently.<sup>9</sup> This figure is now likely to be over £1bn, with estimates that by 2019 the European cycle tourism market could be worth £20bn a year.<sup>10</sup> National organisations such as Sustrans continue to promote the benefits of cycle tourism, both for health and to local economies.<sup>11</sup> This theme is topical, with the National Cycle Network now covering 12,000 miles,<sup>12</sup> and an ever increasing number of individuals, families, groups, clubs and others cycling in and around their local

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<sup>3</sup> <http://www.telegraph.co.uk/finance/newsbysector/retailandconsumer/9501006/Cycle-Surgery-sees-Olympics-sales-boost.html>

<sup>4</sup> <http://www.marketingweek.co.uk/news/retailers-and-gyms-tap-into-olympic-success/4003155.article>

<sup>5</sup> <http://road.cc/content/news/66177-successes-female-gb-cyclists-give-womens-bike-market-big-boost>

<sup>6</sup> <http://www.sales-initiative.com/articles/bicycle-sales-soar-thanks-to-gb-stars'-medal-success-in-the-london-olympics>

<sup>7</sup> Evans Cycles Press Release: 'Wiggins Factor' Delivers Boom in UK Bike Sales

<sup>8</sup> <http://www.retail-week.com/sectors/general-merchandise/cycling-retailers-enjoy-sales-boost-after-wiggins-win/5039044.article>

<sup>9</sup> Sustrans, Cycle Tourism. Information Pack TT21

<sup>10</sup> Ibid.

<sup>11</sup> <http://www.sustrans.org.uk/resources/in-the-news/Connect2-scheme-boosts-local-economy>

<sup>12</sup> <http://sustransbikerace.org.uk/national-cycle-network>

areas and beyond for leisure and sport.<sup>13</sup> Individuals from the second sample were asked if they were more inclined to undertake cycling holidays as a result of the 2012 London Olympics. Chart 2 depicts the wide distribution of responses.

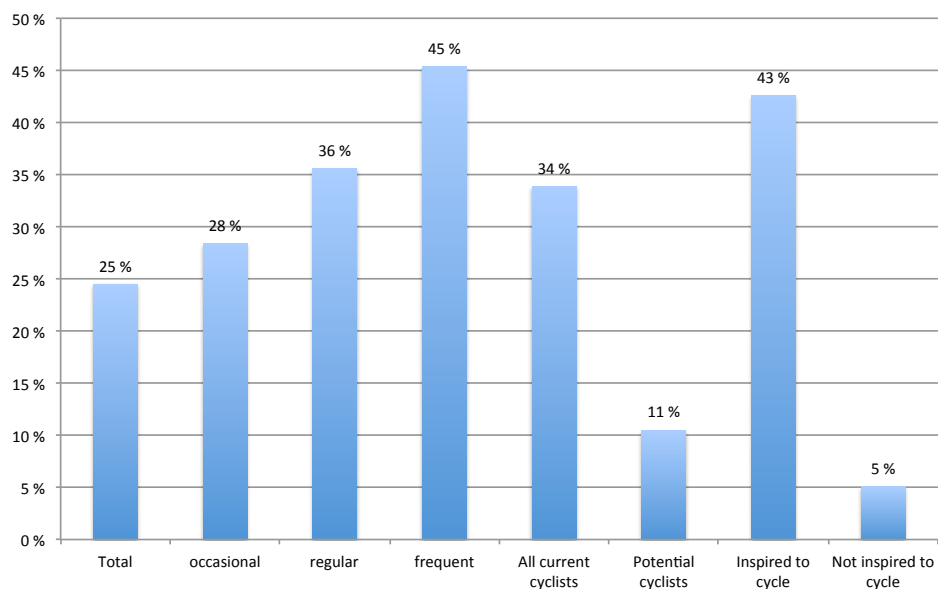


Chart 2: People likely to UK cycling holidays as a result of the London 2012 Olympics

One quarter of the sample indicated that they were more likely to take a UK cycling holiday as a result of the London 2012 Games, with this rising to 45 per cent for Frequent Cyclists, and 43 per cent for those inspired to cycle. This was followed by Regular and all current cyclists at 36 and 34 per cent respectively, and 28 per cent for Occasional Cyclists. In contrast, 11 per cent and 5 per cent of potential cyclists and those not inspired to cycle respectively indicated that they were likely to cycle for holidays. These results confirm that cycling enthusiasm is not confined to local leisure or commuting activities, or sports. Rather, interest exists for cycling for holidays. This potential demand indicates that if policy makers, Local Authorities and other organisations can commence or continue to enhance cycling infrastructure and reduce the ‘fear to cycle’, an ever increasing group may take to their bikes to holiday in the UK.

Around forty per cent of the sample indicated that the London 2012 Olympics had inspired them to visit a Velodrome and organized cycle events as a spectator. There appeared to be some direct relationship between cycling frequency and the motivation to do so: Frequent Cyclists displayed the highest segment motivation, followed by Regular

<sup>13</sup> [http://corporate.sky.com/media/press\\_releases/2012/sky\\_british\\_cycling\\_partnership](http://corporate.sky.com/media/press_releases/2012/sky_british_cycling_partnership)

and Occasional Cyclists respectively. In addition, cyclists who were inspired by the Games to cycle more displayed the highest inclination to visit both of these. These results confirm that the crescendo of interest in cycling in the UK, as reflected by cycle membership increases, British Cycling membership growth, Sport England participation figures, Sky Ride attendance and others in the lead up to the London 2012 Olympics, extends to the passive 'consumption' of cycling.<sup>14</sup> In addition, more than 11 million people watched the Paralympics Opening Ceremony, making it the largest audience in more than a decade,<sup>15</sup> inspiring Team GB's para-cyclist to go on and win 5 Gold, 7 Silver and 3 Bronze medals.

### ***"THE OLYMPIC EFFECT - INSPIRED TO PARTICIPATE"***

One of the most notable results to be obtained was the 'before and after' comparison of the effect of the Olympics on the motivation to cycle on the two samples. In the lead up to the Games, 20 per cent of the first sample indicated that they were motivated to cycle more as a result of the Olympics and other Team GB activities occurring. Immediately following the 2012 Olympic Games, this figure had increased by a factor of over two and a half, with 52 per cent of the second sample indicating that they were motivated to cycle as a result of the achievements of Team GB.

The significant upsurge in motivation has the potential to result in many a new cyclist added to the UK cycling population, in addition to migrating others between segments, if the Olympic Effect is capitalised on by individuals. Chart 3 presents the results by segment, with all of these reflecting major jumps in results after the Olympics.

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<sup>14</sup> <http://www.poplarblog.co.uk/residents-news/1085-more-bums-on-saddles-why-britains-cycling-clubs-are-thriving/>

<sup>15</sup> <http://www.channel4.com/news/paralympic-games-shifts-attitudes-towards-disabilities>

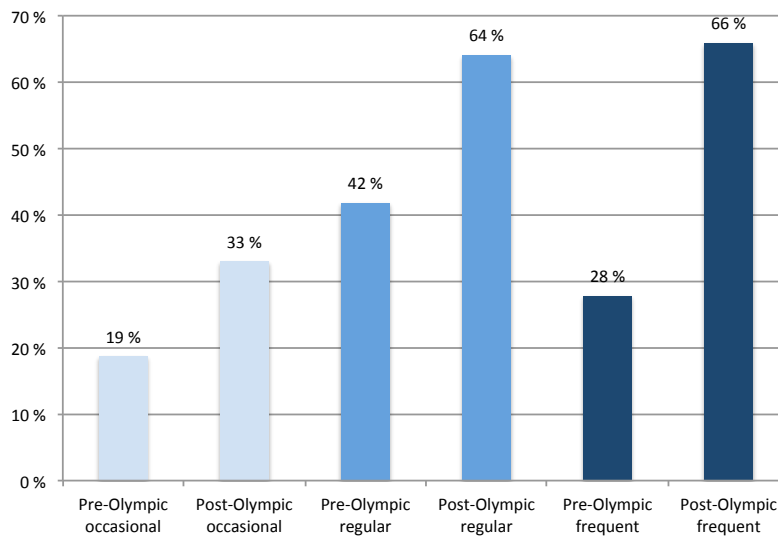


Chart 3: The Olympic Effect by segment before and after the Games

Frequent cyclists displayed the most substantial increase, with the figure more than doubling to 66 per cent. This was followed by Regular Cyclists, who displayed a 22 per cent increase, and Occasional Cyclists, who displayed a 14 per cent increase. The surge in motivation to cycle was not confined to existing cyclists. The potential pool of cyclists also showed a major uplift in their inclination to cycle as a result of Team GB's achievements. This segment of the sample almost tripled in size after the Olympics, with a rise from 14 to 41 per cent. This confirms that the Olympic Effect was not confined to existing cyclists, and was ubiquitous in its influence. This represents an opportunity for the conversion of both this group of potential cyclists, and in the migration of existing cyclists.

Many potential cyclists are likely to commence cycling with activities congruent with an absence from riding. For many 're-entering' cyclists, this will occur through lower-intensity cycling. Chart 4 depicts the intended activities for non-cyclists sampled before and after the 2012 London Olympics.

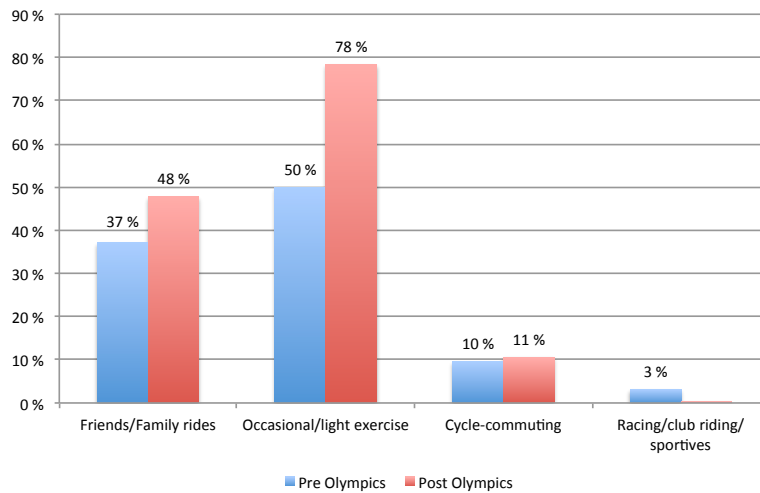


Chart 4: Intended cycling activities for non cyclists

The largest influence of the Olympics has been indicated amongst social riding and occasional rides for light exercise. The latter reflected an increase of almost 30 per cent in cyclists motivated to undertake the activity, whilst the potential for social cycling increased by 11 per cent. In contrast, the commuting effect was comparable before and after the Olympics, with around 10 per cent of people indicating that they were influenced to start commuting by bike.

Thirty six per cent of the post-Games sample had children under the age of 16. Almost 60 per cent of the total sample indicated that they were motivated by the Games to encourage their children to cycle, as indicated in chart 5.

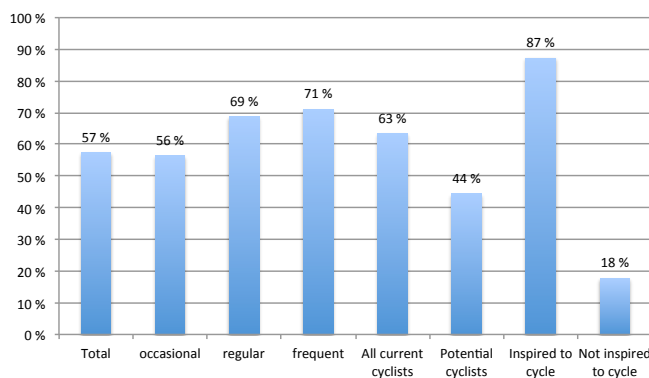


Chart 5: Proportion of those responsible for children under 16 encouraging them to cycle



The pattern of motivation amongst segments mirrored the intensity of cycling, with more frequent cyclists indicating a greater degree of motivation than Regular and Occasional Cyclists with 71, 69 and 56 per cent responding positively respectively. Eighty seven per cent of those inspired to cycle by the Games also encouraged their children to cycle, whilst almost one in five of those not inspired by the Games also did so. This confirmed the ubiquity of the Olympic Effect in this area of activity in addition to others already highlighted.

### **“A GOLDEN OUTLOOK FOR PARTICIPATION”**

The surge in cycling’s popularity is not an isolated event or confined to an elite sports segment: it is consistently being reflected across the UK at all levels ranging from social; occasional and regular; commuting; frequent and increasingly, tourism and holiday cycling. British Cycling has doubled its membership in the past five years alone to 50,000,<sup>16</sup> whilst ‘sportives’, weekend cycling races, have increased by 900 per cent since 2002 to over 300 a year.<sup>17</sup> The success of mass participation programmes such as Sky Ride have continued, with 200,000 people taking part in major city events and 835 local events in 2011. 700,000 new people are now riding their bikes once a month as a result of the British Cycling and Sky partnership since 2008<sup>18</sup>.

British Cycling has also continued its efforts to encourage younger cyclists to enter competitive events through its *Go-Ride Racing* collaboration with Sky, which entered its second year in 2011. Over 13,000 children have taken part in 800 racing events to date that are seen as a stepping-stone between school or club cycle coaching sessions, and regional level cycling competitions.<sup>19</sup> These organisations are joined by Local Authorities, Sport England, Sustrans, employers and others, that are continuing to create the infrastructure and facilities required to encourage a greater degree of cycling. Concomitant to, or perhaps as a result of, the 2012 London Olympic and Paralympic Games, these factors are dovetailing with wider socio-cultural factors that are spurring cycling’s inclusiveness and its popularity. The ‘reach’ of Team GB’s Olympic Effect is wide and appears to be assisting in the achievement of cycling targets by a range participants. The 2012 Games have continued the cycling success achieved in Beijing in 2008, but this

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<sup>16</sup> British Cycling, 2012.

<sup>17</sup> <http://www.guardian.co.uk/lifeandstyle/2012/jan/29/cycling-boom-olympics>

<sup>18</sup> [http://www.britishcycling.org.uk/zuvvi/media/bc\\_files/corporate/Facts\\_about\\_participation.pdf](http://www.britishcycling.org.uk/zuvvi/media/bc_files/corporate/Facts_about_participation.pdf)

<sup>19</sup> <http://corporate.sky.com/thebiggerpicturereview2011/sport-priorities.aspx#tab4>

has also occurred against a backdrop of continued activity to embed cycling further into mainstream UK.

Twenty per cent of all the people indicated that they had been influenced to cycle more in the lead up to the 2012 London Olympics; the 'Olympic Effect'. Seventy per cent of these cyclists were existing cyclists, with the remaining 30 per cent non-cyclists. Of the existing cycling segments, the lowest segment confirming an influence of the Olympic on cycling habits was Occasional Cyclists: 19 per cent indicated that they were cycling more due to the influence of the 2012 Games. Although lower than the other two segment increases, this result represents an increase for around one in five cyclists. These cyclists represent a key group that can migrate to regular or even frequent cycling. If this increase was sustained, the effect on the base of all three cycling segments in the UK can be significant.

Twenty eight per cent of Frequent Cyclists and 33 per cent of Regular Cyclists were also cycling more due to the influence of the Olympics. These increases indicate that around one in three cyclists in active segments cycled more in the lead up to the Olympics. These are key target segments for both the Government and Cycling Organisations, which in addition to encouraging more people to cycle, are also active in encouraging greater frequency and competitive cycling.

Chart 6 indicates that existing Frequent Cyclists were distributing their increased Olympic-driven participation evenly across a range of activities:

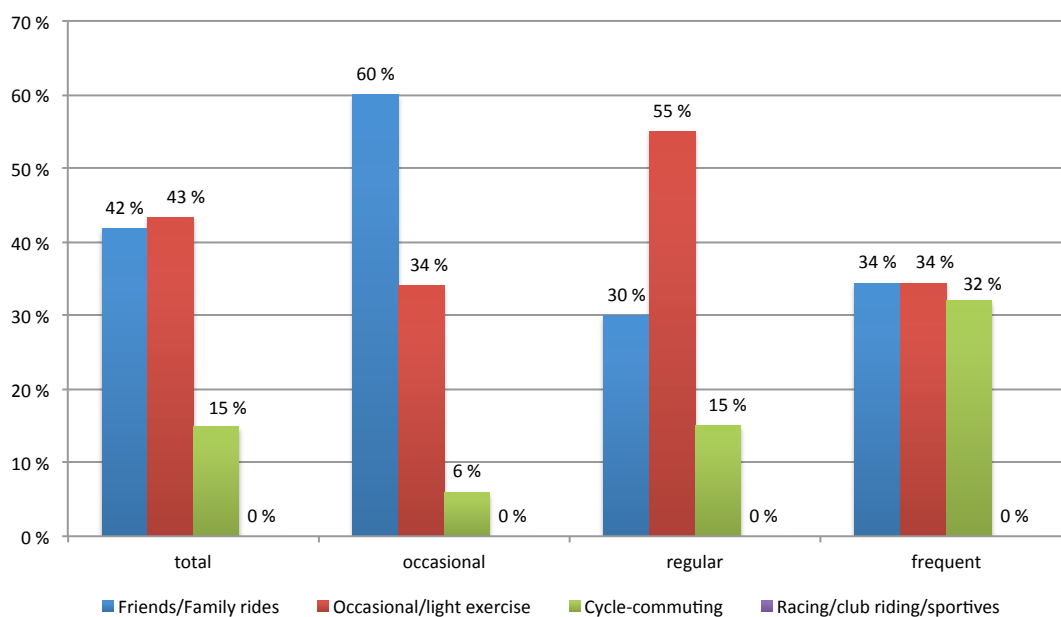


Chart 6: The distribution of increased cycling activity by current cyclists due to the Olympic Effect

Events such as Sky Ride have confirmed that mass cycling enhances cycling in a social context, in addition to being a springboard for encouraging smaller rides, both organised and solo.<sup>20</sup> The largest increase in Olympic-driven cycling in the existing cycling group was for friends and family rides and for occasional and light exercising. The overall boost in commuting cycling of 15 per cent reflected a wide variation amongst the three segments, with frequent cyclists increasing this activity by 32 per cent, and even the most occasional cyclists commuting by bike 6 per cent more frequently than before the Olympics.

Thirty per cent of respondents inspired to cycle as a result of the lead-up to the 2012 London Olympics were non-cyclists. These represented 14 per cent of non-cyclists in the sample, with the remainder not motivated to cycle as a result of the London Games. Due to this group not cycling at present, respondents were not able to be divided across the three major cycling segments. Chart 7 summarises the distribution of intended cycling participation for this group across *activities*.

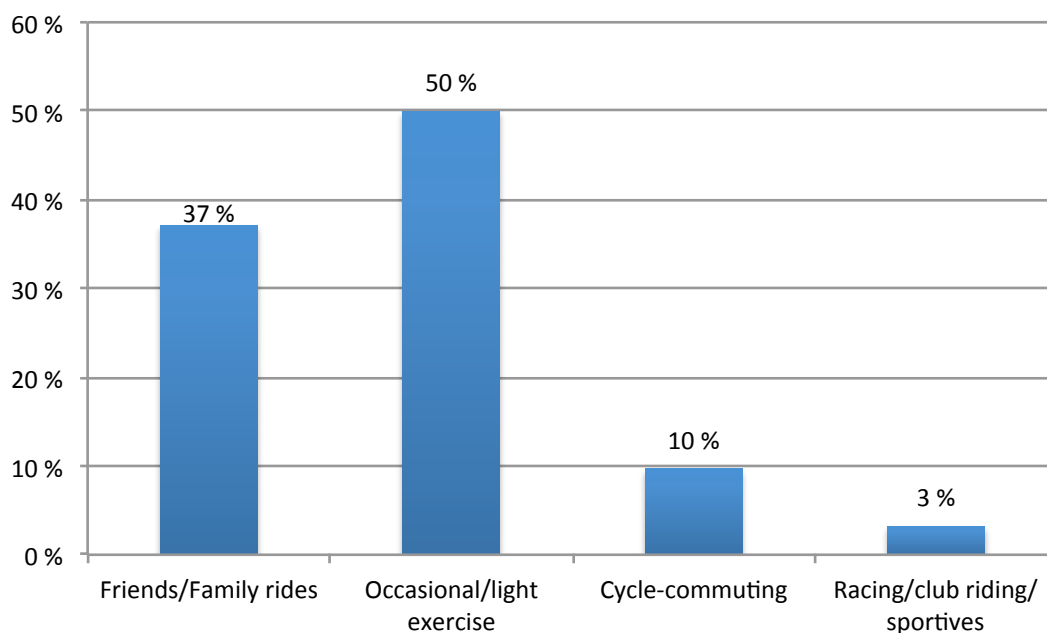


Chart 7: Proportion of non-cyclists likely to cycle more by the Olympic Effect across activities.

<sup>20</sup> <http://www.preston.gov.uk/news/2012/jul/preston-s-sky-ride-success-boots-cycling-guild-year/>

Over forty per cent of respondents indicated that the Olympic Effect had inspired them to participate in mass cycle events such as Sky Ride. This was greatest amongst current cyclists, as indicated in Chart 8.

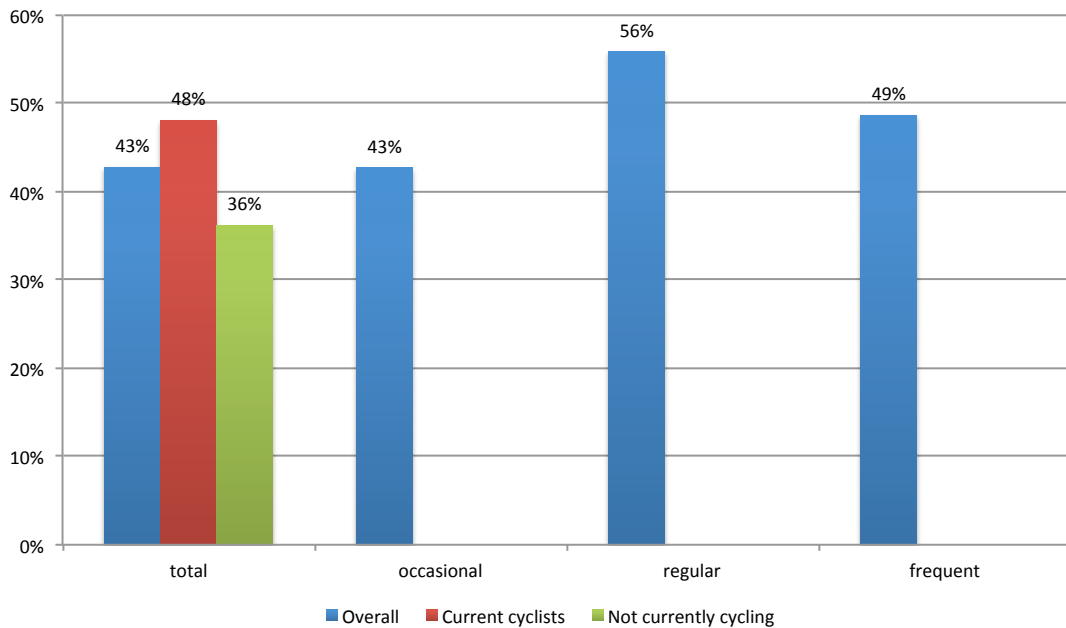


Chart 8: The Olympic Effect on mass ride participation

Almost half of current cyclists had taken part in mass rides as a result of the Olympic Effect. The largest influenced segment was Regular Cyclists, with 56 per cent inspired to do so. In contrast, 43 per cent of Occasional Cyclists were motivated to do so, and 49 per cent of Frequent Cyclists. It appears that the influence of cycling amongst more frequent, elite and enthusiast cyclists is no longer confined to just 'their' cycling activities, but is permeating to involve others around them. Sky and British Cycling have confirmed that often, such experienced cyclists will assist by taking on Leader roles, or engage in Sky Local rides in a similar capacity, in addition to also cycling with others such as family in non-organised rides.<sup>21</sup>

***“TEAM GB INSPIRING A REAL LONDON LEGACY”***

The success of Team GB both at the Olympics and in cycling in particular further affirmed the sport as a key strength for the UK. Respondents were asked to indicate their

<sup>21</sup> <http://www.goskyride.com/SkyRideLocal>

impression of two GB-related factors: (1) the longevity in getting more people cycling, and; (2) medal expectations at the next Olympics. Chart 9 indicates that with the exception of those not inspired to cycle, the overwhelming majority of people believed that the London 2012 Olympic Games will have a lasting effect on cycling participation in the UK, including almost 100 per cent amongst those inspired to cycle, and over 90 per cent amongst Frequent Cyclists. In addition, almost 70 per cent of those not inspired to cycle shared this view. These results confirm a resounding degree of support for the sustained growth of cycling in the UK, with individuals iterating a perception that if rooted in a firm belief holds a higher chance of being translated into greater cycling participation.

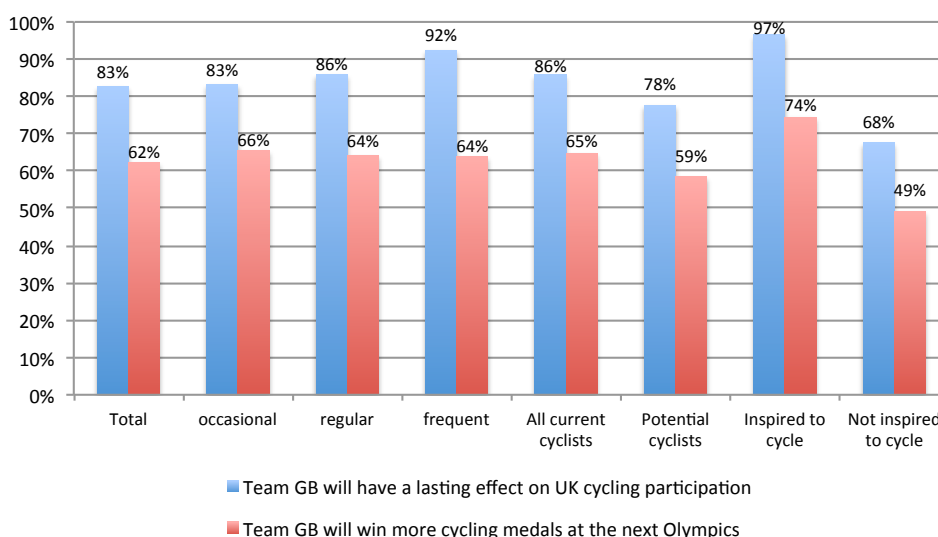


Chart 9: People responding positively on Team GB influence and further medal prospects

Sixty two per cent of the sample believe that Team GB will win more cycling medals at the 2016 Olympics, with this figure varying upwards by 2-4 per cent across the three cycling segments. Respondents inspired to cycle once more had the highest positive response, with almost three quarters believing this would occur, whilst around half of those not inspired to cycle still believed that the GB Team would win more medals.

**“PARA-BRILLIANCE FOR EVERYONE”**

Britain’s dominance in cycling in the Olympic Games was mirrored in the Paralympics: Team GB’s Paralympic track cyclists won 15 medals including 5 Gold, 7 Silver and 3 Bronze.<sup>22</sup> In combination with a further 7 medals won in road cycling, including 3 Gold, 2 Silver and 2

<sup>22</sup> <http://www.london2012.com/paralympics/cycling-track/medals/>

Bronze,<sup>23</sup> Team GB's Paralympic cycling team reinforced the UK as being at the pinnacle of the Sport. Success on the track appears to be filtering out, with British Cycling estimating that participation in cycling has increased by 20 per cent since the 2008 Beijing Olympic Games, with over 200,000 people with a disability cycling at least once per week.<sup>24</sup> Sarah Storey's British female record of 11 Gold Paralympic cycling medals and 22 career medals,<sup>25</sup> could provide further motivation for increased participation. Paralympic Cycling was explored with the second post-Olympic sample and the view of this group of cycling in both Games.

The success of the London 2012 Paralympics Cycling was explored as a possible motivating factor in spurring people to watch or visit other para-cycling events. Almost two thirds of those inspired to cycle indicated that they were motivated to do so, with Frequent, Regular and Occasional Cyclists following with 56, 52 and 42 per cent respectively indicating that this has been a motivating factor.

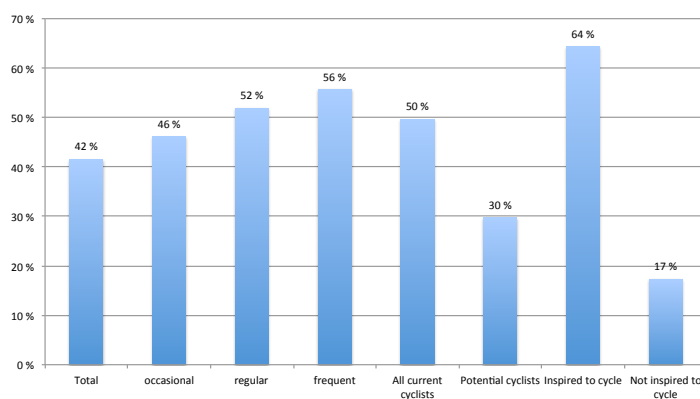


Chart 10: London 2012 Games cycling success inspiration to watch or visit other para-cycling

Potential Cyclists and those not inspired to cycle indicated the lowest motivation to attend other para-cycling events, with 30 and 17 per cent respectively confirming such a preference. A motivation to support para-cycling further, beyond attending competitive events, was evident across the sample, with this theme explored to assess the degree to which Team GB's cycling success across both Games influenced people to support new investment in cycling and para-cycling. Chart 11 compares the responses, with those inspired to cycle once more indicating the highest degree of support.

<sup>23</sup> <http://www.london2012.com/paralympics/cycling-road/medals/>

<sup>24</sup> <http://www.bikebiz.com/news/read/cycling-participation-on-the-up-for-those-with-long-term-disabilities/013611>

<sup>25</sup> <http://www.espn.co.uk/london-olympics-2012/sport/story/168920.html>

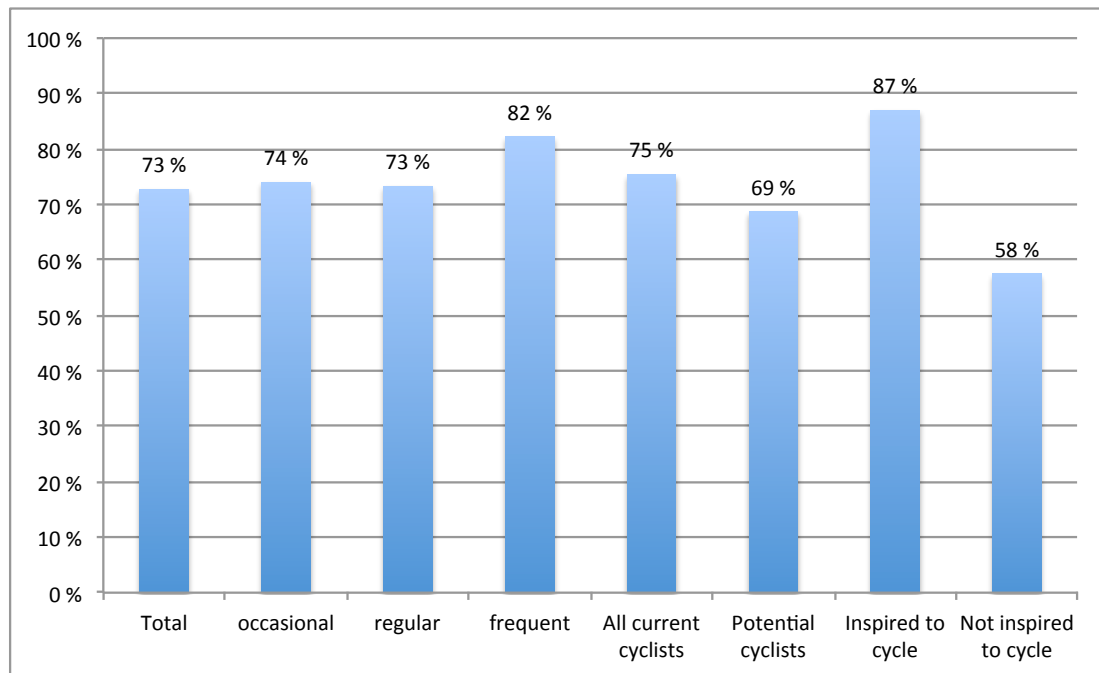


Chart 11: London 2012 Games cycling success inspiration to support new local investment in cycling and para-cycling.

Although the difference in the motivation to support local investment in cycling and para-cycling between the segments and other categories was flatter than in the previous chart, the trend was similar: more active participants displayed the greater motivation for participating as a result of the influence of the 2012 Games. A key upturn was the non-inspired cyclists, with almost 60 per cent motivated to support new investment. Overall, around three quarters of the sample were supportive.

The final area explored with this sample was the degree to which respondents were motivated to volunteer in supporting people with a disability to cycle in their local area. Just over half of the sample indicated a motivation to do so, with Regular and Frequent Cyclists located on either side of this with 47 and 58 per cent respectively indicating their willingness to participate. In contrast, no Occasional or Potential Cyclists indicated a willingness to assist. Twenty nine per cent of participants who were not inspired to cycle indicated that they would volunteer to support people with a disability ride in their local area.

## **CONCLUSION**

Since 2008 Sky and British Cycling's aim has been to increase participation, support leading riders and inspire the next generation onto two wheels. This research has provided useful evidence that the Olympics have given a boost to this work. The outlook for the British cycling landscape is positive, with strong drivers pushing participation and an uplift in the breadth of people inspired to cycle, but a sustained approach is needed to fully cement cycling into the fabric of British life.



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## ABOUT THE AUTHOR

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Dr Alexander Grous is a productivity and innovation specialist in the Centre of Economic Performance (CEP) at the London School of Economics. He has an interest in sports and sponsorship economics including how corporate participation in sports can foster social, economic and health benefits. Dr Grous has also been engaged in leading research at the CEP in partnership with McKinsey and Company across 5,000 firms in ten countries on how managerial practices affect firm performance. He has considerable research experience in other sectors including digital media, broadcasting, banking and finance and high technology, and continues to advise FTSE 100 organisations and others in these sectors, as well as government. Dr Grous has taught in postgraduate courses within the Department of Management and currently teaches within the LSE's Executive Programmes. He is the Academic Director for a number of innovation programmes in Europe, and has led advisory teams for digital political campaign strategies. Dr Grous has previously held industry roles internationally, permitting him to provide an applied focus to his research. He is also a keen triathlete and cyclist.

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