

LES MILLS

CYCLING: INNOVATION IN THE PHYSICAL ACTIVITY SECTOR

Examining the role of cycling in the physical activity sector, and the drivers, barriers, and opportunities of indoor and outdoor cycling across demographics

With a foreword by Wendy Coulson,
CEO, Les Mills UK & Ireland

Supported by ukactive

contents.

Foreword: Wendy Coulson, CEO, Les Mills UK & Ireland	(p4)
Introduction:	(p5)
<hr/>	
Part One: On Two Wheels: Who Is Currently Cycling In The UK?	(p7)
Part Two: Cycling: Problems, Barriers, Solutions	(p10)
Part Three: Lessons To Be Learned From Overseas & Regional Success	(p13)
Part Four: How Can We Get More People Cycling: Messaging, Innovations, Opportunities, and Challenges	(p15)
<hr/>	
Summary: The Future Of Cycling Campaigns & Messaging	(p17)
<hr/>	
Feature Interview: Bryan Steel, former professional cyclist.....	(p19)
<hr/>	
References & resources	(p22)

participants.

Chair

Steven Scales - Client Services Director, ukactive

Participants

B Hunter - Digital Strategy & Product Manager, British Cycling

Dr James Steele - Associate Professor in Sport & Exercise Science at the Centre for Health, Exercise and Sport Science, Solent University

Chris Phillips - Director, DataHub

Matthew Pearce - Area Fitness Manager, Places Leisure

Paul Street - National Health & Fitness Manager, Serco Leisure

Paul Harpham - General Manager, Places Leisure, Rochdale

Jean-ann Marnoch – Instructor Experience Director, Les Mills UK

Erin Myers - Marketing Director, Les Mills

Andy Bourne - Former Managing Director, Xpect Leisure

Chris Billington - Principal Technical Specialist (Health), Transport for London

Simon Laumet - Co-founder & COO, Honor Cycles Ltd

Ian Cousins - MD London Cycle Hire Scheme, Serco

Russell Gundry - Head of Innovation Strategy, Plexal

foreword.



Wendy Coulson,
CEO, Les Mills UK & Ireland

I'm delighted to be introducing this whitepaper, supported by ukactive, which explores the state of cycling in the physical activity sector. It is fantastic to have had the involvement of such a wide and diverse range of industry experts, academics, operators and the wider cycling community to contribute to this important discussion.

Cycling has grown exponentially as both an indoor and outdoor sport over the past few years, with indoor cycling topping ukactive's "Moving Communities" leisure trends report as the most popular group workout from 2016-2018. Indeed, within our own business, Les Mills indoor cycling classes grew by a huge 79% between 2016 and 2017. Our roundtable discussion highlighted that, whether cycling indoors, outdoors or using a cycle hire scheme, cycling provides a great means of maintaining an active lifestyle.

We know that 29% of Millennials are interested in or participating in indoor group cycling, presenting us with the opportunity to support young people in getting active and staying active. This all comes down to being able to provide the right programming and amazing inspirational instructors in clubs. With cycling representing 12% of overall class attendance in 2018, we're working hard to support our club partners to produce the best cycle offering for members. Our superstar clubs have full cycle studios which account for 20% of member attendance, versus the average club attendance of only 7%.

Our job is to break down the barriers of entry to cycling, particularly around indoor solutions, by addressing the perception that indoor cycling is 'tough' and that time and cost can be prohibitive.

Cycling is entering an exciting period; with cycle hire becoming more accessible, improvements in cycling infrastructure making outdoor cycling increasingly attractive, exciting new innovation from e-bikes to immersive studio cycling and the significant growth of indoor cycling. We must work together to harness this opportunity to inspire and influence more people to take up cycling.

introduction.

On 25th October 2018, Les Mills hosted a group of industry experts at a roundtable discussion looking at the opportunities represented by indoor and outdoor cycling in the physical activity sector. Participants included representatives from leisure operators, national governing bodies of sport, transport, academia, public health, innovation, and the wider cycle community. The aim of the roundtable was to examine the role of cycling, the differences between indoor and outdoor cycling, and the barriers and opportunities presented by all types of cycling.

The first half of the roundtable set the scene, looking at who is currently accessing cycling opportunities (indoor and outdoor) in the UK. Roundtable participants discussed perceived differences between indoor cycling, group cycling, and outdoor cycling in all its forms. The group debated real and perceived barriers to cycling across demographics, and brainstormed opportunities that could be opened up to encourage more people to enter cycling, or to move from indoor to outdoor (or outdoor to indoor).

The second half of the roundtable looked more closely at the current and future opportunities for cycling to increase physical activity, and the role cycling could play in tackling some of the health and fitness issues in the UK. The group looked at potential messaging and marketing which could benefit cycling as an activity, and explored possible innovations that could increase awareness and participation. The discussion ended with in-depth talk about the opportunities offered by cycling, and the ways the industry needs to step up to overcome challenges and offer cycling as an appealing solution for more people.

This white paper, produced by Les Mills and supported by ukactive, documents the roundtable discussion, summarises the agenda, and reports on the conclusions of the day. We hope you enjoy reading the range of expert opinion shared on the day, and we look forward to being a central part of future debate, innovation, and developments around cycling in the physical activity sector.

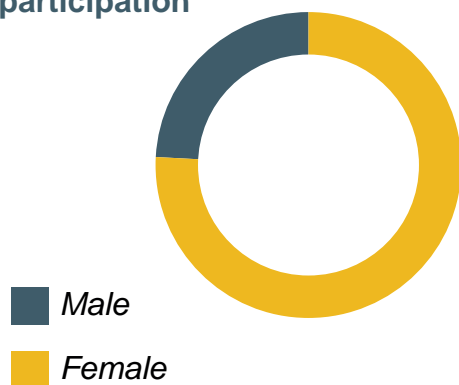
part one.

**On Two Wheels:
Who Is Currently
Cycling In The UK,
And What Are The
Barriers &
Opportunities?**

On Two Wheels: Who Is Currently Cycling In The UK, And What Are The Barriers & Opportunities?

It is clear the UK boasts strong cycle numbers across indoor and outdoor cycling, although the clear split in male/female participation suggests underlying barriers (and opportunities for the sector to do more). 73% of indoor group cycling participants are female (with an even spread across age groups). In England road cyclists are predominantly male with the 40-49 year old age group making the most cycling trips.

indoor cycling participation



Looking at the indoor landscape, we know that globally 29% of millennial exercisers are either currently participating in indoor cycling group exercise, or are considering it. Between 2016 and 2017, participation in Les Mills indoor cycling classes grew by a huge 79%.

In the UK, there is a vast offering under the indoor group cycling umbrella, including experience-led boutique classes, home-based or virtual-led (Sufferfest, Peloton, turbo trainer workouts), and performance-based classes (Wattbike, Stages flight).

But most clubs globally service only 7% of their membership with their cycle offering. Great clubs understand different types of cycle programmes appeal to different target audiences. These clubs have full cycle studios which are responsible for up to 20% of member attendance.

The 2018 “Moving Communities” active leisure trends report, produced by the ukactive Research Institute with DataHub, assessed consumer behaviour across 396 UK sites with data for six million members across three financial years. This represents nearly 150 million visits by members and casual users in 2016, 2017, and 2018. This report cites indoor cycling as the most popular group workout for the third year in a row - In 2018, it represented 12% of all class attendances.

“**Indoor group cycling therefore represents a powerful opportunity for bringing new people into cycling, helping the sector reach new markets and close some significant gaps**”

Indoor cycling has the capacity to pull people in from complete beginners through to athletic and elite performers from road cycling and triathlon. Benefits of group cycling over outdoor cycling include safety, standardised conditions, and minimal investment in kit. Indoor group cycling therefore represents a powerful opportunity for bringing new people into cycling, helping the sector reach new markets and close some significant gaps.



Our industry must innovate to successfully get the message out to these new demographics, and design an appealing package which delivers the solution these customers need.

Transport for London supplied interesting insight regarding outdoor cycling in the capital, with current participation dominated by white middle class males. More must be done to promote cycling as a safe, sensible transport solution for more diverse groups. This action point is high on the agenda for TfL, the goal being a cycling population which reflects the actual population of London.

As an industry, we can see there are opportunities for moving participants from indoor cycling to outdoor, and from outdoor to indoor group cycling classes. But the wider public may not see as many opportunities, because of the real and perceived barriers that currently stand in their way.

Roundtable participants from the sport and transport sides of the industry commented that these barriers include cycling fitness, investment in kit, road cycling confidence, outdoor safety, road safety and infrastructure. We were encouraged to hear from TfL who state cycling in London is getting safer (thanks in part to the commitment to Vision Zero). But public perception of road cycling does not yet reflect the reality of improved safety and better road infrastructure for cyclists.

At present, group indoor cycling and outdoor cycling participants represent diverse groups, but the two activities are not mutually exclusive. The group discussed the major benefits of moving from one activity to the other, and debated ways to communicate these benefits in fresh, clear messaging across user groups.

What can we learn from areas where outdoor cycling participation is higher and more evenly spread across genders, age groups, and

range of factors (including road infrastructure, resources, and long-standing bias towards cycling) results in an unsurprising bump in cycling participation statistics. Around 1/3 of commuters in Cambridge commute by bike, with an equal gender balance and a strong level of cycling in the over 65 age group.

These encouraging statistics were balanced by more troubling numbers: according to a YouGov poll commissioned by British Cycling, 33% of parents say their child cannot ride a bike. More must be done to encourage participation in cycling, not just current participants, but the next generation of active adults. Increasing numbers of participants will give a valuable sense of confidence, and greater participation will give the industry plenty of social proof for future campaigns.

“ 33% of parents say their child cannot ride a bike ”



part two.

**Cycling: Problems,
Challenges,
Solutions**

Cycling: Problems, Challenges, Solutions

As the discussion turned to childhood and grassroots experiences of cycling, the roundtable participants debated the various (real and perceived) barriers to cycling in all its forms.

Road safety remains a major barrier for outdoor cycling amongst new and experienced road cyclists.

Bike theft and inadequate storage facilities (on the street, at offices, and at leisure centres) was cited as another barrier. Bikes are significant investments, and people are understandably reluctant to use their bikes for everyday commuting if their security or storage is in question.

Scheme bikes remove the barriers of investment, security, and maintenance costs. Honor Cycles introduced its innovative solution to tackle the barrier of bike maintenance: offering on-site maintenance for busy professionals, women, and other demographics for whom bike upkeep could be prohibitive.

People who have previously only done indoor cycling may feel ill-equipped to head out on the road, lacking the road skills, confidence, and even the fitness to go on a longer outdoor bike ride under variable conditions.

Conversely, people who ride outdoor for leisure or commuting may feel indoor cycling will be too intense (the group noted spinning's traditional "hardcore" messaging and marketing visuals).

“**Virtual represents a key opportunity for breaking down barriers**”

Virtual represents a key opportunity for breaking down barriers, and Places Leisure cited their success using this model. On-demand for virtual could be a relatively easy solution for operators, with beginner classes enabling new clients to take sessions in their own time and at their own pace.

And then there is the stickier problem of transference of skills from indoor to outdoor



cycling (and, to a lesser extent, from outdoor to indoor). Although there are plenty of similarities between riding an indoor group cycling machine, and riding a bike on the road, the skills gap can be prohibitive. Indoor cycling instructors are well placed to play an important role in teaching skills, improving fitness, and imparting confidence on the bike.

In what other ways can we fill this gap (perhaps with skills sessions, coaching, clubs, and a better grassroots cycling movement for children and adult learners)?

Despite the overwhelming popularity of indoor group cycling, more can be done to communicate with inexperienced or new participants. Operators and instructors have a duty to communicate the structure, level, and intensity of class so participants feel better equipped to choose between types of class.

More could be done to cater for time-poor participants, or parents taking their children to activity classes. Could operators respond with new formats of indoor cycling class (20-30 minute sessions) to fill relevant slots on the timetable and to put empty studios to better use?

How can we facilitate more effective partnerships between indoor group cycling and outdoor cycling? Ideas from roundtable participants included clearly communicating local links, from facilities to cycle groups to cycle hire and bike maintenance.



What other activities do fans of indoor cycling enjoy? Could operators design packages of sessions, or new types of membership, to appeal to these customers and attract them into the facility? With so many people citing time as the biggest barrier to exercise (whether or not this is factual), we should do all we can do create attractive options to fit people's schedules.

The roundtable group agreed a key barrier to cycling was cultural: cycling is seen as difficult, expensive, and high-risk. For example, research from Cycling Scotland found 60% of people living in Scotland have an "entrenched reluctance" to cycling more frequently, even though the vast majority of people acknowledged the benefits of cycling. Cycling participation is tied up with perceptions and learned behaviour. So, alongside immediate initiatives, do we need longer term strategies to educate and inspire upcoming generations?

“**Research from Cycling Scotland found 60% of people living in Scotland have an “entrenched reluctance” to cycling more frequently**”

Acquisition and retention are two very different parts of a commercial agenda. Cycling suffers from a narrow sphere of influence. It doesn't feature strongly in the lives of minority demographics including younger women, inactive populations, deprived parts of the UK, and harder to reach areas. Who are the influencers creating excitement in the cycling sector? Is the current messaging around indoor and group cycling motivating, or does it turn a large percentage of people away?

British Cycling reported on its facilities strategy where the focus is on developing multi-use sites to open up more opportunities for crossover between different types of cycling, different sports and other leisure activities.

part three.

**Lessons To Be
Learned From
Overseas &
Regional Success**

Lessons To Be Learned From Overseas & Regional Success

Looking further afield, could we model the success stories of overseas countries and some regions of the UK? As previously discussed, Cambridge is a great example of how city planning, road infrastructure, and ingrained attitudes to cycling can boost participation.

- 1** **Tokyo** boasts one of the highest percentages of bike use in Asia (around 16% of journeys in the city take place on bikes), and has a culture of “mamachari” (mum’s bicycles).
- 2** In the **Netherlands**, more than one-quarter of all trips made by Dutch residents are by bicycle. Cycling is largely normalised in cities like Amsterdam, removing the “us and them” attitude to cycling that prevails in other parts of the world.
- 3** In **Copenhagen** bike racks can be found on taxis.
- 4** **Bologna** has a voucher scheme where cyclists can be rewarded for riding their bikes, as a way to encourage sustainable forms of transport.
- 5** Closer to home, **Manchester** has unveiled plans for ‘Beelines’ - a city-region-wide cycling and walking network which will have more than 1,000 miles of routes, including 75 miles of segregated bike lanes. This will be the largest joined-up system of walking and cycling routes in the UK and is the result of partnership between all 10 Greater Manchester local authorities, led by Greater Manchester’s Cycling and Walking Commissioner (Chris Boardman).



part four.

**How Can We Get
More People
Cycling?**

**Messaging,
Innovation,
Opportunities, and
Challenges**

How Can We Get More People Cycling? Messaging, Innovation, Opportunities, and Challenges

How can the industry use technology and innovation to get more people cycling, more often?

Virtual is the ideal opportunity to fill empty studios, plug gaps in timetables, and educate beginners in a safe, non-threatening environment.

Experience-led classes, with their exciting visuals, reduce levels of perceived exertion and provide audio visual distraction.

enjoyment, higher retention, better results, and less intimidation factor for newcomers. Les Mills are leading the way with immersive class experience “THE TRIP™”, which is hugely successful in attracting and retaining first timers.

Use of pedal-assist ebikes could open up cycling to a much larger amount of people, including harder to reach demographics like older people, the less fit, and those intimidated by exercise.

Bristol has already started educating people via a cycling proficiency style scheme using ebikes. Research supports the use of ebikes for health improvement and fitness: The University of Bristol’s School for Policy Studies with the NIHR Bristol Biomedical Research Centre conducted a pioneering study into the health benefits of ebikes for people with Type 2 diabetes. The 2018 study - PEDAL - showed encouraging improvements in health markers including weight loss, and a number of the participants chose to purchase their ebike at the end of the study.

Innovation occupies the space between academia and the user experience, and has an important role to play in getting more people involved in cycling. It is up to us to decide what is an acceptably robust “imperfect step” to push cycling forwards into the future of physical activity.



summary.

Summary: The Future of Cycling Campaigns & Messaging

With so many different kinds of cycling styles, indoor group classes, and offerings, it's clear operators must segment their audiences in order to be successful with marketing. This is a key learning point for clubs, leisure centres, and other operators. There should be no one-size-fits-all solution for indoor cycling. Attraction, retention, and referral rates will be much higher if the timetable reflects the range of people who could benefit from indoor cycling. More needs to be done to educate and introduce newcomers, less conditioned, or unconfident customers. Virtual and short intro sessions could fill this need, as well as filling gaps on timetables and in empty studio spaces.

The group agreed cycling should be increasingly promoted as a life skill to children (with messaging directed at parents, too). Swimming has traditionally benefitted from this perception, so why not riding a bike? British Cycling have developed 'HSBC UK, Ready Set Ride', a set of learn to ride resources hosted online and The Department of Transport administers the Bikeability programme.

More could be done to encourage movement from indoor to outdoor cycling, and to keep people active within the sport. This needs partnerships and innovation between operators, leisure facilities, local bike clubs, bike shops, and cycle hire schemes. If we can engage people in cycling and show a clear pathway with signposting from indoor to outdoor (and back again), from leisure to fitness, including commuting and cycle hire schemes, and friendly events (similar to the parkrun model in running) then we would lose fewer people from cycling. And that would benefit the health of the population, the next generation, and the environment.

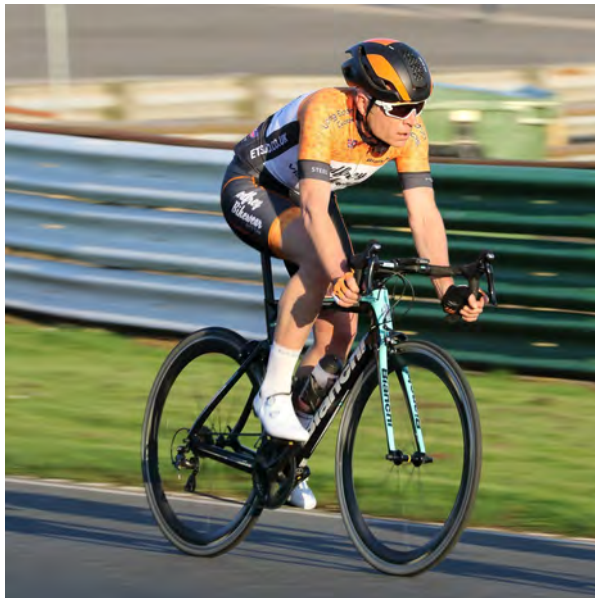
“
If we can engage people in cycling and show a clear pathway with signposting from indoor to outdoor (and back again), from leisure to fitness, including commuting and cycle hire schemes, and friendly events (similar to the parkrun model in running) then we would lose fewer people from cycling.”



featured interview.

With Bryan Steel

Featured Interview With Bryan Steel



Bryan Steel represented Great Britain at the 1992, 1996, 2000 and 2004 Summer Olympics. A double Olympic Medallist – Bryan has developed a range of programmes to support and encourage people with cycling at all levels.

How would you describe the state of cycling in the UK?

I think the UK cycle space is really strong at the moment and entering a bit of a golden period. People aren't only viewing cycling as an elite level sport, but as a sport everyone can get involved in. We're recognising the many positive elements of cycling that aren't common across all sports. These include active and efficient commuting, and cycling's ability to connect people socially to the sheer number of environments, terrains and styles of cycling available.

How do you think things have changed over the last decade?

Not only has the indoor (studio) cycling space grown considerably in the last few years (which will only benefit the pathways into the sport in the long run), but we're seeing a lot of people 40+ cycling outdoors which has been a massive growth area. At that age people who previously did high impact sports or have existing injuries may be attracted to cycling as it's relatively low impact but can provide a strong social aspect and an excellent workout.

How do you think group cycling can pull new people in to cycling?

I see studio cycling as a great pathway into the sport. Participants can get a feel for cycling and enjoy the benefits. The social elements are great too, from working out together to going for a coffee afterwards. Indoor is offering people a way of connecting and feeling part of a bigger movement. I don't think this is truly appreciated in the wider cycling community.

What are the biggest barriers stopping people from cycling? And how can we overcome these?

In terms of Indoor cycling, there's a perception the intensity is going to be too much and you'll get 'beasted'. People need to be made aware there are loads of different programmes and providers. It's about finding what's best for you. Indoor cycling can sometimes be presented under the banner of spin, but we need to explain whether the class is performance focused, endurance or sprint focused session, so they can make the right choice for their needs.

Instructors also play a hugely important role. Just taking the time to ensure participants have their bikes set up properly (saddle at the right height and handle adjusted specifically) could make the world of difference to how someone feels in the class. A lot of indoor cycling involves fitness instructors teaching cycle. I think as an industry we can do more to help these great instructors understand some of the performance-specific nuances in cycling. It's this attention to instructor education and performance that makes the likes of Les Mills so strong.

In outdoor cycling, the barriers are usually road safety or perceptions about cycle speed. The rules of the road have changed (in favour of cyclists), but messaging and the quality of road safety information needs to improve. We need to highlight that all road users must share the road and being considerate is key – whether you're a cyclist, driver or pedestrian. The environment makes a huge difference. The increasing number of cycle lanes in the UK must be welcomed. I urge new cyclists to increase their speed gradually and start at a pace that's right for them – rather than trying to keep up with the fastest in the group.

How can we strengthen the pathways between indoor cycling and outdoor cycling?

We really need to deepen links between indoor and outdoor cycling! As Winter approaches and the weather gets poorer and the evenings darker it's a perfect opportunity. Let's make sure outdoor cyclists are aware of indoor cycle programmes and opportunities. And when the weather is warm there may be opportunity to migrate indoor groups outside for some sessions. It would be good to link indoor studios with outdoor cycling clubs, and support leisure facilities to investigate links between these forms of cycling. Representative bodies like ukactive and British Cycling could help by using their reach to deepen connections indoor and outdoor.

The aim for everyone - whether an indoor cycling provider, an outdoor club or even a cycle hire scheme - must be to keep people cycling. There's a big threat of losing people to other activities or sports, so we should work more closely together.

Are there any examples of excellent practice we can learn from to get more people cycling in the UK?

The Netherlands and Belgium are far ahead of us when it comes to cycling infrastructure - and cycling has become part of the culture. We're still a way off getting full cultural change in the UK, although the work been done in cities like Cambridge is encouraging.

I think we can make better use of design to support cycling efforts in the UK. I often see bike lanes put in place that take up a proportion of the road (and other road users don't like this and often disregard it completely). Protected cycle lanes like you see in the Netherlands could be really useful here - where and when it's possible to incorporate them.

What innovations can help get more people cycling?

I really love the virtual and immersive indoor cycling movement. Following the music on screen



can have a really distracting effect, time stands still, and it almost makes you forget about how much effort you're exerting. I recently tried "THE TRIP™"- Les Mills immersive cycling product. It was so realistic and fun to take part in! I also like Zwift, and have heard local youth cycle groups are cycling with it at home and can connect with each other and organise routes through it.

I recently worked with British Bike Hire who will hire you a bike for the day tailored to your needs. This is useful when the cost of purchase can be an issue. The likes of Santander cycles are also making cycling a consistent travel option. I urge big companies to ensure they have shower facilities where people can get changed, along with good bike storage areas to make cycling safer and more accessible.

We could even have safe school cycle routes where children and parents can join en route.

It's not a one size fits all approach. We need a range of innovative ideas to support the growth of cycling.

How would you like to see cycling messaging/campaigns positioned in the UK market?

There has been a big social media campaign to highlight that drivers must (by law) give cyclists 1.5 metres distance when overtaking. I think the key is market penetration, especially with younger people who are more likely to be using social media. But people in older age groups may be missing out on some of this messaging. So it's important to use a broad range of media channels.

'Bikeability' is a very good programme educating children about cycling and road safety. I think children are more safety conscious than previously (we used to be teased for wearing helmets!). It's heartening to see children rushing out of my daughter's school with their helmets on, and such behaviour being increasingly normalised by young people.

While the UK has celebrated the inspiring stories and remarkable feats of some fantastic elite cyclists in recent years – from Sir Chris Hoy to Geraint Thomas – I'd like to see us also champion the stories of everyday cycling heroes. How about people who have never cycled before, then

completed a 60 mile challenge? Or a community cyclist of the year award? Most people know they'll never win the Tour de France, so highlighting everyday achievements could have a great impact. It's important to note that the top end of the sport is well funded (the world class performance programme), but at grassroots level cycling is not so well funded. But the perception is that grassroots cycling has a healthy level of funding because of the elite level success.

What are your hopes for the future of cycling in the UK?

I think we're on the cusp of exciting times for cycling, so let's keep the momentum going. There's a boom in indoor group cycling, exciting innovations entering the market, accessible cycle hire is becoming more widespread, and we're getting better at educating young cyclists. We have a collective responsibility to make sure this all comes together. I'd like to see fewer programmes running independently, and more joined-up working together - for the greater good of cycling.

More could be done to cater for time-poor participants, or parents taking their children to activity classes. Could operators respond with new formats of indoor cycling class (20-30 minute sessions) to fill relevant slots on the timetable and to put empty studios to better use?

How can we facilitate more effective partnerships between indoor group cycling and outdoor cycling? Ideas from roundtable participants included clearly communicating local links, from facilities to cycle groups to cycle hire and bike maintenance.



references.

The following resources are mentioned in this white paper.

Moving Communities Report <http://research.ukactive.com/movingcommunities2018/>

International Society of Physical Activity & Health 2018
<http://www.ispah.org/london-2018/>

Cycling Scotland research
<https://www.cycling.scot/mediaLibrary/other/english/4209.pdf>

British Cycling facilities strategy
<https://www.britishcycling.org.uk/road/article/20180926-road-%C2%A315-million-government-investment-to-transform-community-cycling-facilities-one-year-out-from-Yorkshire-2019-0>

University of Bristol PEDAL ebike study
<http://www.bris.ac.uk/sps/news/2018/e-bikes.html>

British Cycling Ready Set Ride <https://www.readysetride.co.uk/>

Millennial exercisers
Les Mills Global Consumer Study 2019

Tokyo cycling culture
<https://www.theguardian.com/cities/2016/jan/05/where-world-most-cycle-friendly-city-amsterdam-copenhagen>

Netherlands cycling culture
<https://english.kimnet.nl/publications/publications/2018/04/06/cycling-facts>

Department for Transport: Walking and Cycling Statistics: England 2017
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/736909/walking-and-cycling-statistics-england-2017.pdf