

86% OF RESPONDENTS AGREED
WITH THE STATEMENT THAT

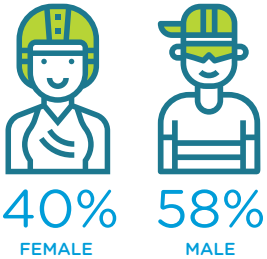
“ bike share makes
the city a better
place to cycle „

Bike Share Users Survey

2019

2019 Survey Result Key Findings

THE GENDER SPLIT OF BIKE SHARE
USERS IS MUCH MORE EVEN THAN FOR
GENERAL CYCLING

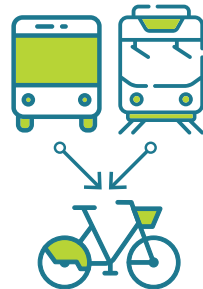


DATA AVERAGED OVER 4 YEARS OF RESULTS

SHARED EBIKE SCHEMES
SUPPORT USERS TO CYCLE TO WORK
MORE FREQUENTLY



BIKE SHARE ENABLES USE OF
PUBLIC TRANSPORT BY OFFERING
A LAST MILE SOLUTION.



23%

RESPONDENTS USE BIKE SHARE IN
CONJUNCTION WITH THE BUS

35%

RESPONDENTS USE BIKE SHARE IN
CONJUNCTION WITH THE TRAIN

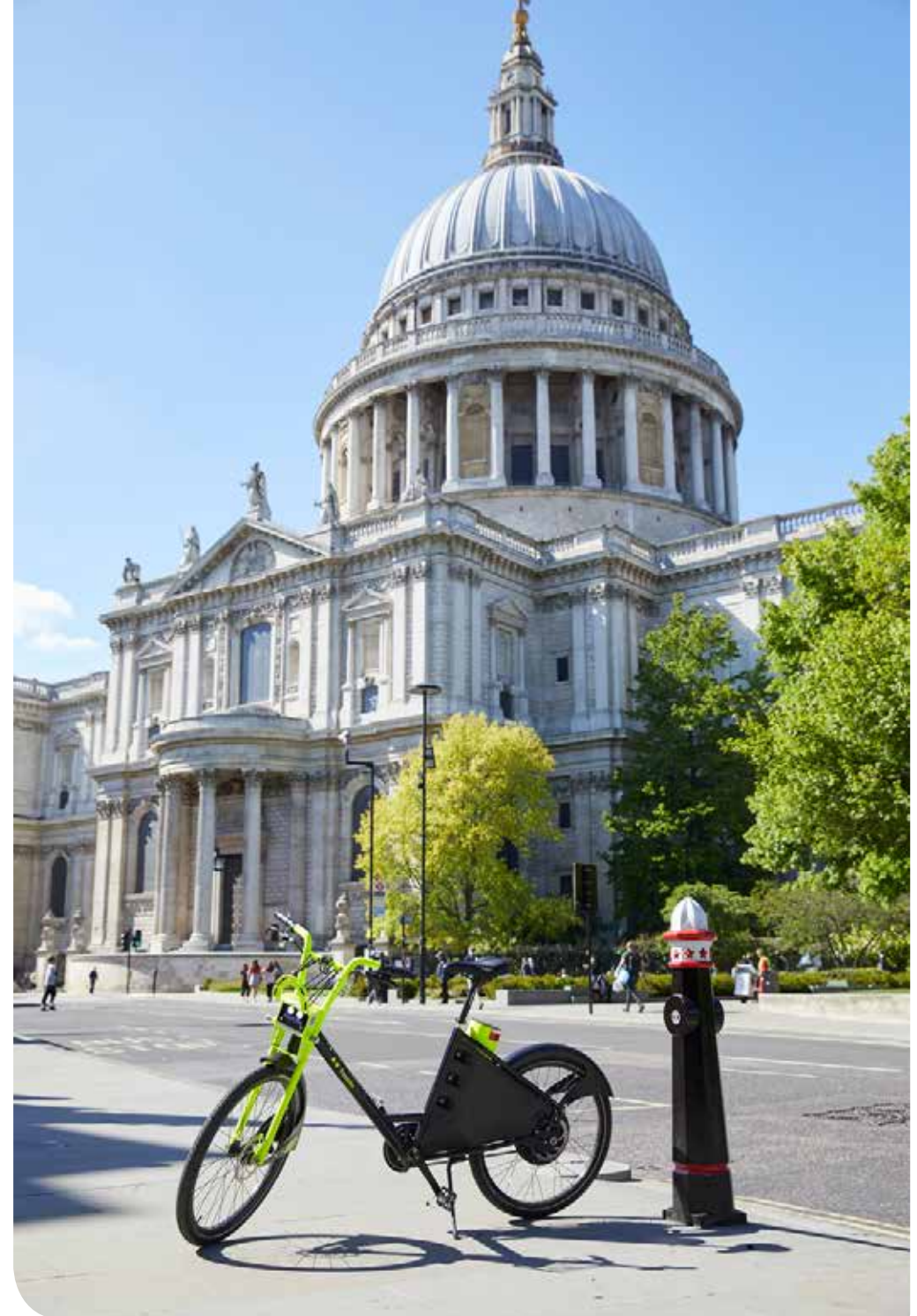
DATA AVERAGED OVER 4 YEARS OF RESULTS

BIKE SHARE IS A TOOL FOR
RE-ENGAGING CYCLISTS.



46%

BIKE SHARE USERS SAID THE BIKE
SHARE SCHEME WAS THE CATALYST TO
CYCLING (AGAIN)



This report presents the results of the fourth annual Bike Share Users Survey; the only such research being carried out across the UK. The survey is key to providing the evidence of the social and environmental impacts of public bike share.

The data has been reviewed by an independent analyst and it is presented in the context of the previous three years of results years to create a robust assessment of the sector.

The survey is a key tool for understanding the impacts of bike share schemes, and how the UK's bike share sector is performing.

It has been a year of mixed fortunes for bike share. New schemes have developed in Edinburgh, and Cardiff plus there are many new operations in London. However, the year has also seen several schemes closing (Derby, Reading and Northampton).

The problems experienced are mainly due to business models and vandalism, and do not negate the benefits that providing on-street public bike hire can provide.

It can be argued that now, more than ever, there is a need to understand the scale and range of impacts of bike share.

This report looks at key policy areas such as whether bike share can support health and wellbeing, and trigger sustainable travel behaviours, as well as assessing differences due to gender, geography and e-bikes.

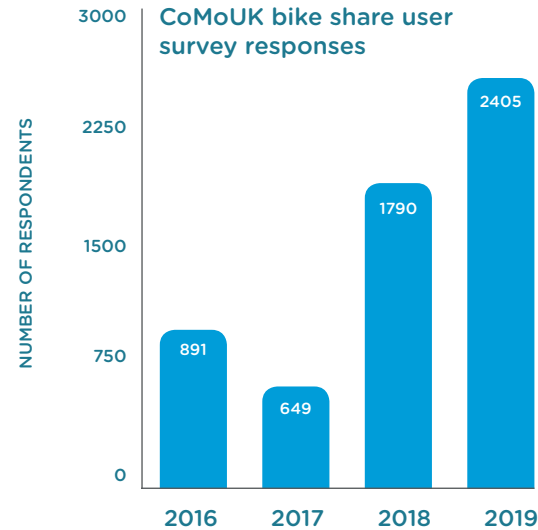
Methodology

The Bike Share User Survey was produced by CoMoUK (previously Carplus Bikeplus) in conjunction with, UK bike share operators, and local authority representatives. It was distributed via email, and social media, to users of schemes in 35 towns and cities, run by: Hourbike, nextbike, Serco, Beryl, Lime, Jump, Freebike, Mobike, Smoove / ITS, Brompton Bike Hire, Co-bikes and Liverpool City Cycles. between the 10th June and 22nd July 2019. As in previous years, as an incentive, respondents were given the opportunity to enter a prize draw to win one of 5 £50 shopping vouchers.

In total, 2,405 responses were received, comparing to 1,790 in 2018. It is difficult to assess the number of bike share users due to their transient nature but data collected by CoMoUK estimates that there are over 600,000 current active users, in the UK and over 100,000 outside London. Responses from the London Santander Cycle scheme are low as this scheme has its own survey. Taking the response numbers of the users in relation to user of other schemes it is estimated the response rate is around 2%.

610 respondents reported that they used an electric bike when bike sharing, and their responses are analysed separately in some instances.

The results were analysed by independent consultant Conor Walsh and verified by Dr Sally Cairns, of Sally Cairns & Associates Ltd.



There was a more even geographical spread of responses this year (albeit that response numbers do not reflect the size of the schemes, with London under-represented). Response numbers broke down as: Glasgow 26%, Brighton 20%, Cardiff 10%, Edinburgh 7%, London 16%, Milton Keynes 5% and Stirling 5%.

Of those responding, 70% of users had joined a scheme in the last 2 years - 34% in 2019 and 36% in 2018

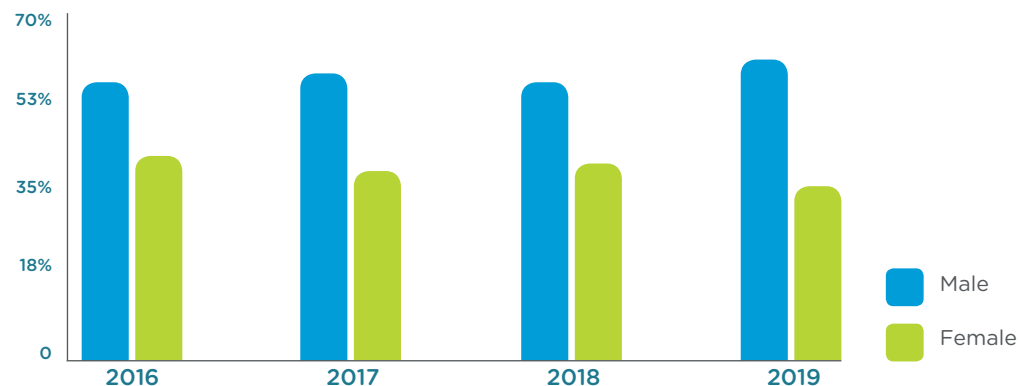


Demographic of bike share users

The gender split for bike share users, as indicated from the 2019 survey, was 61% male compared to 37% female (with 2% of the sample not responding, 'other' or 'prefer not to say'). The proportion of women was somewhat lower than in previous years.

Results averaged for 2016-2019 give a ratio of 58:40% (with the remaining 2% classified as 'prefer not to say').

These figures can be compared to the latest National Travel Survey (England 2018), where, on average, only 29% of cycle trips were carried out by women.



Age

The age spread of bike share users was from 15 to 75 with the majority in the 25-54 category (78%), including 30% in the 25-34 group, 29% in the 35-44 group and 19% in the 45-54 group.

Ethnicity

The percentage of White British respondents was 66% in 2019, down from 73% in 2018, and there was a subsequent slight increase in the percentage of other ethnic backgrounds: 20% selected the category "white other", 4% identified as Asian / Asian British, 3% as "mixed multiple ethnicity" and 7% as other ethnicities.

Employment

82% of respondents stated they were employed; 11% were students; and 2% were retired. Less than 1% were unemployed. The remaining chose "other" or "prefer not to say". Responses were received from all income groups. Of those who answered the question about individual personal income (50%), 21% were on an income of less than £20,000 including 9% of the total who were on an income of less than £10,000.

THE GENDER SPLIT OF BIKE SHARE USERS IS MUCH MORE EVEN THAN FOR GENERAL CYCLING



40% 58%

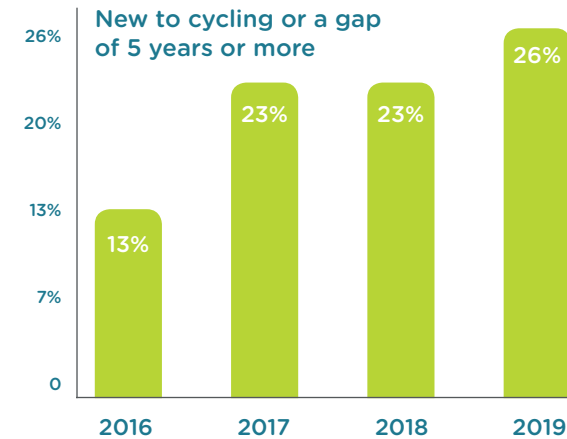
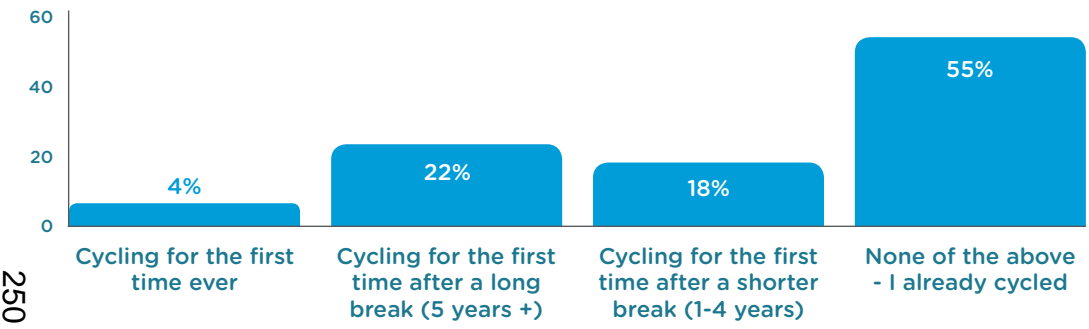
FEMALE MALE

DATA AVERAGED OVER 4 YEARS OF RESULTS

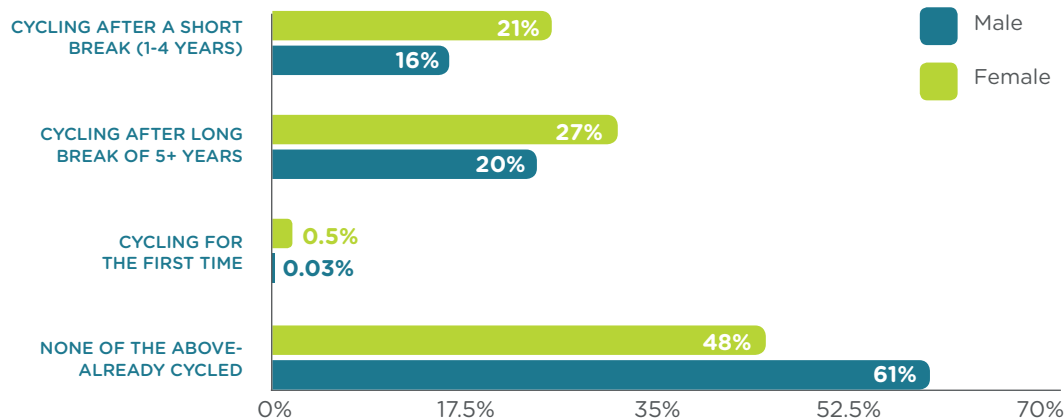
Potential to attract new cyclists

As with the survey responses from previous years, the data indicates that bike share is a catalyst to re-engaging with cycling. A total of 46% said that bike share was a trigger to them cycling again - 26% of respondents said they had begun cycling after a gap of 1 year or more, and a further 18% hadn't ridden a bicycle for between 1 and 4 years.

Looking back at the data from the four years of surveys, on average, over 20% of respondents reported that the bike share scheme was a trigger to cycling (again).



When looking at the gender split of responses to the question, a higher proportion of women were more likely to have started cycling for the first time or after a 5+ year break.



BIKE SHARE IS A TOOL FOR RE-ENGAGING CYCLISTS.

46%

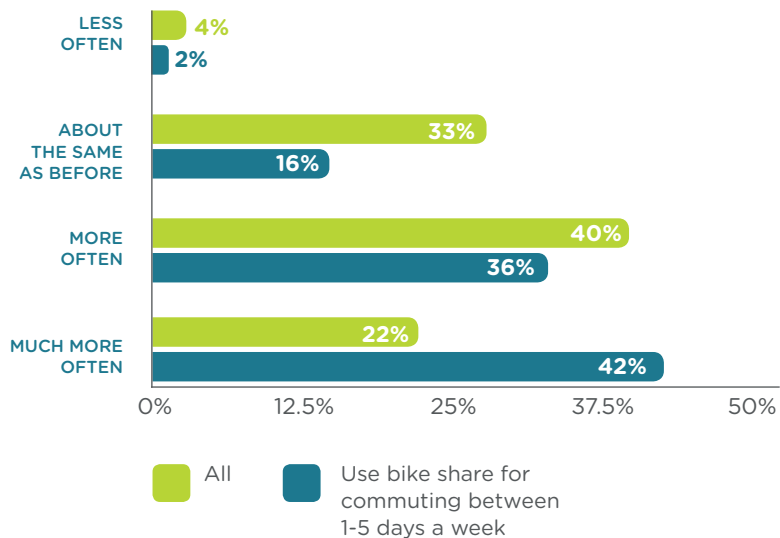
BIKE SHARE USERS SAID THE BIKE SHARE SCHEME WAS THE CATALYST TO CYCLING (AGAIN)

Increasing cycling trips

The survey asked whether users had changed the amount that they cycle since they started using the scheme. Well over half (63%) reported an increase, with 40% stating that they are cycling more often and a further 23% choosing the option indicating that they are cycling “much more often.”

Results for those who use bike share for commuting (between 1-5 days a week) increases the proportion of those cycling much more often to 42% indicating that providing bike share in locations which support commuting may particularly increase the amount that people cycle.

Change in cycling levels since using bike share



BIKE SHARE IS A COMPLEMENT TO OWNERSHIP



12%
OF USERS WENT ON TO BUY A BIKE
-
47%
USE A PERSONAL BIKE AS WELL AS BIKE SHARE.



Health benefits

There is a large amount of evidence to support the theory that bike share increases physical activity, and has positive impacts on both mental and physical health.

When asked about the total amount of moderate or vigorous exercise done in the last week through using bike share - 12% said they had done the Government's recommended 2.5 hours a week or more, whilst 23% had done between 1 and 2.5 hours. 37% reported that they had done none, presumably because they had not used the scheme, whilst 29% had done less than an hour.)

13% of respondents reported that use of bike share is the only moderate to vigorous exercise they get on a regular (weekly) basis

BIKE SHARE OFFERS A VALUABLE OPPORTUNITY TO INCREASE PHYSICAL ACTIVITY LEVELS



13%

OF RESPONDENTS REPORTED THAT THIS WAS THE ONLY MODERATE TO VIGOROUS EXERCISE THEY GET ON A REGULAR (WEEKLY) BASIS



48%

SPECIFICALLY REPORTED ON EXERCISE/PHYSICAL HEALTH BENEFITS AS REASONS WHY THEY CHOOSE TO USE THE BIKE SHARE SCHEME



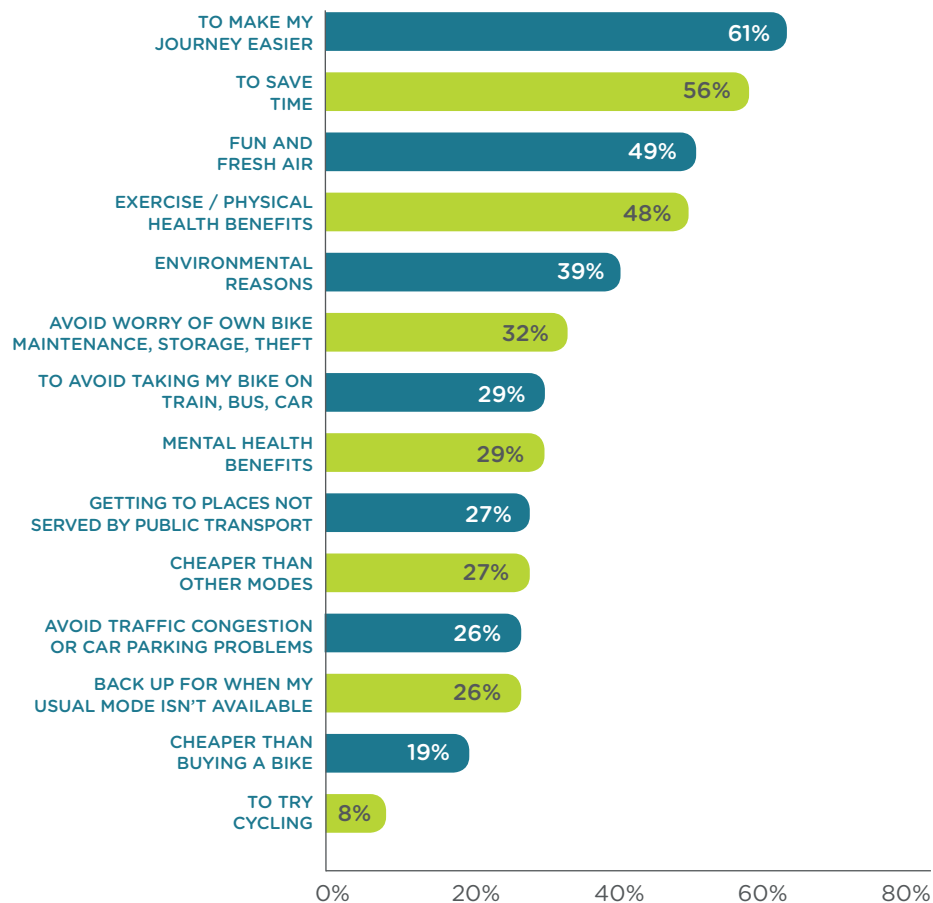
29%

REPORTED ON MENTAL HEALTH BENEFITS, AS REASONS WHY THEY CHOOSE TO USE BIKE SHARE SCHEMES



Personal benefits of opting to travel by bike share

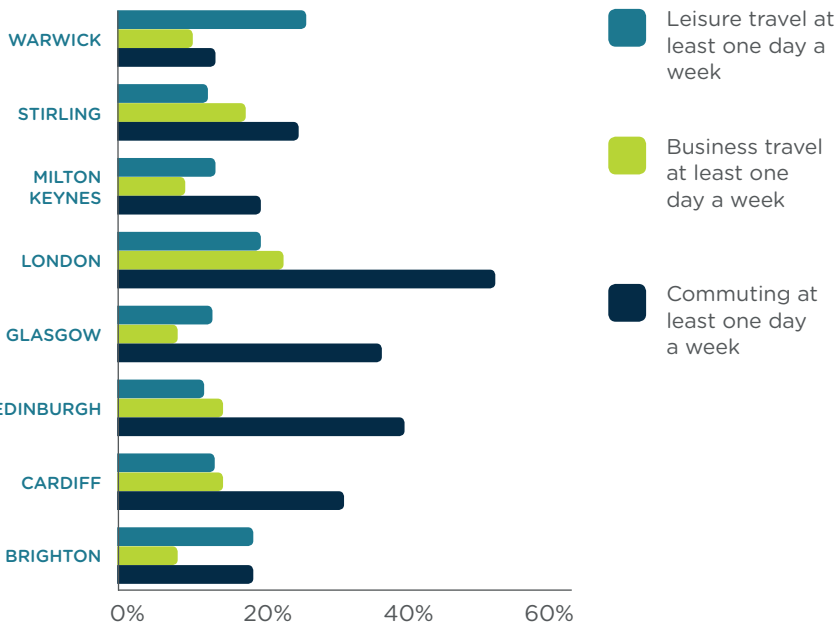
Respondents were asked to choose 'all that applied' from a list of reasons for using the bike share scheme. The 2019 survey results reinforce previous results, showing that convenience (time savings, and ease), exercise and fresh air were the top reasons for choosing bike share.



Trip purpose

Respondents were asked how often they use bike share for a range of different journey purposes. 30% of respondents used a bike to travel to work at least once a week, and a further 12% of respondents used a bike for a business trip at least once a week. Other trip purposes included: cycling for leisure (41% >1 trip per month); personal business trips, (52% >1trip per month) and visiting friends and family (35% >1trip per month).

There was some regional variation in trip purpose. In the larger cities, commuting was more commonly reported, whilst the areas with more nice cycle rides along the sea front, in the country or parks had a higher proportion of leisure trips



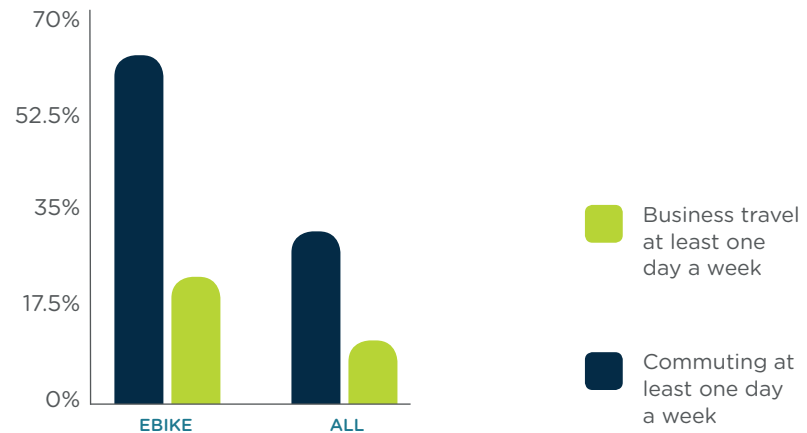
The proportion of users commuting by bike share more than doubled, when looking at the sub-sample (610 respondents) with access to electrically-assisted bikes.

SHARED EBIKE SCHEMES SUPPORT USERS TO CYCLE TO WORK MORE FREQUENTLY



60%

OF THOSE USING EBIKES SHARE REPORTED THAT THEY WERE COMMUTING



Mode shift for commuting

Bike share *commuters* (1,220 respondents) were asked how they previously travelled to work. (Respondents could choose more than one option and a significant proportion indicated that they used bike share in addition rather than instead of to their usual mode).

The results for all cities combined were:

- 32% previously walked
- 21% were using the bus, and 9% switched from the train
- 6% previously used their own bike
- 17% said they previously travelled by car (driver or passenger) or taxi, suggesting the potential for bike share to reduce congestion and pollution.

A separate question asked whether bike share commuters had changed the amount they use their car. 37% said they were using their car either much less (12%) or less (25%). The remaining respondents were using their car about the same amount. (Respondents were given the option to choose more often, or much more often, but did not do so.)

BIKE SHARE REDUCES CAR USE

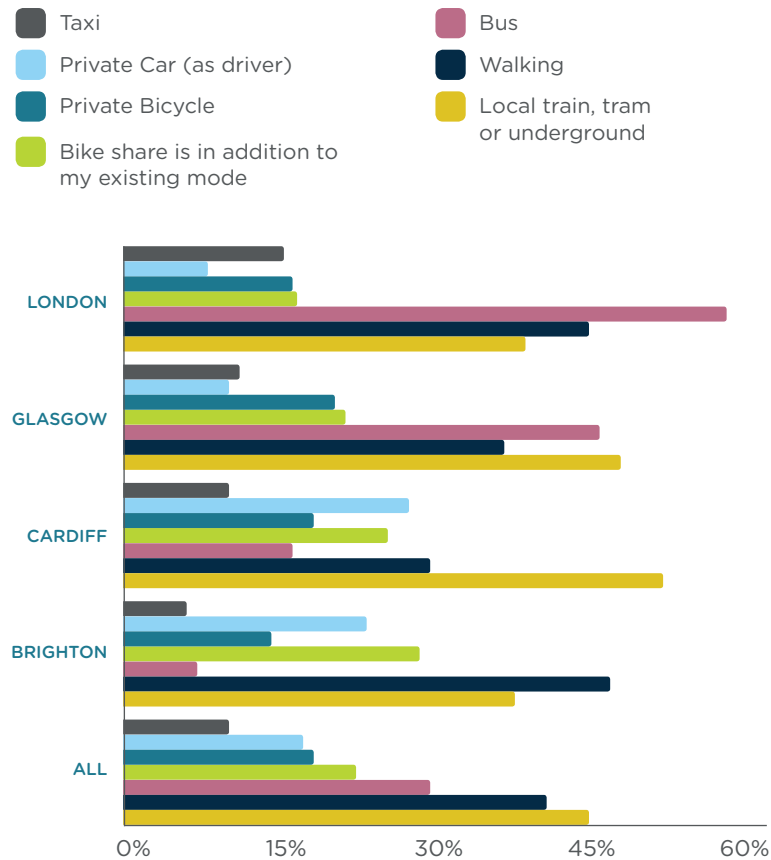


17%

OF BIKE SHARE COMMUTERS HAD PREVIOUSLY TRAVELLED BY CAR (DRIVER OR PASSENGER) OR TAXI

Split out by city, there are more respondents switching from car in less dense cities such as Cardiff and Brighton.

If you use bike share for commuting, which mode(s) did bike share replace? (Selected cities)



Electric bikes in bike share

The extent to which people were able to reduce their car use was higher for those with access to electric bikes in their scheme.

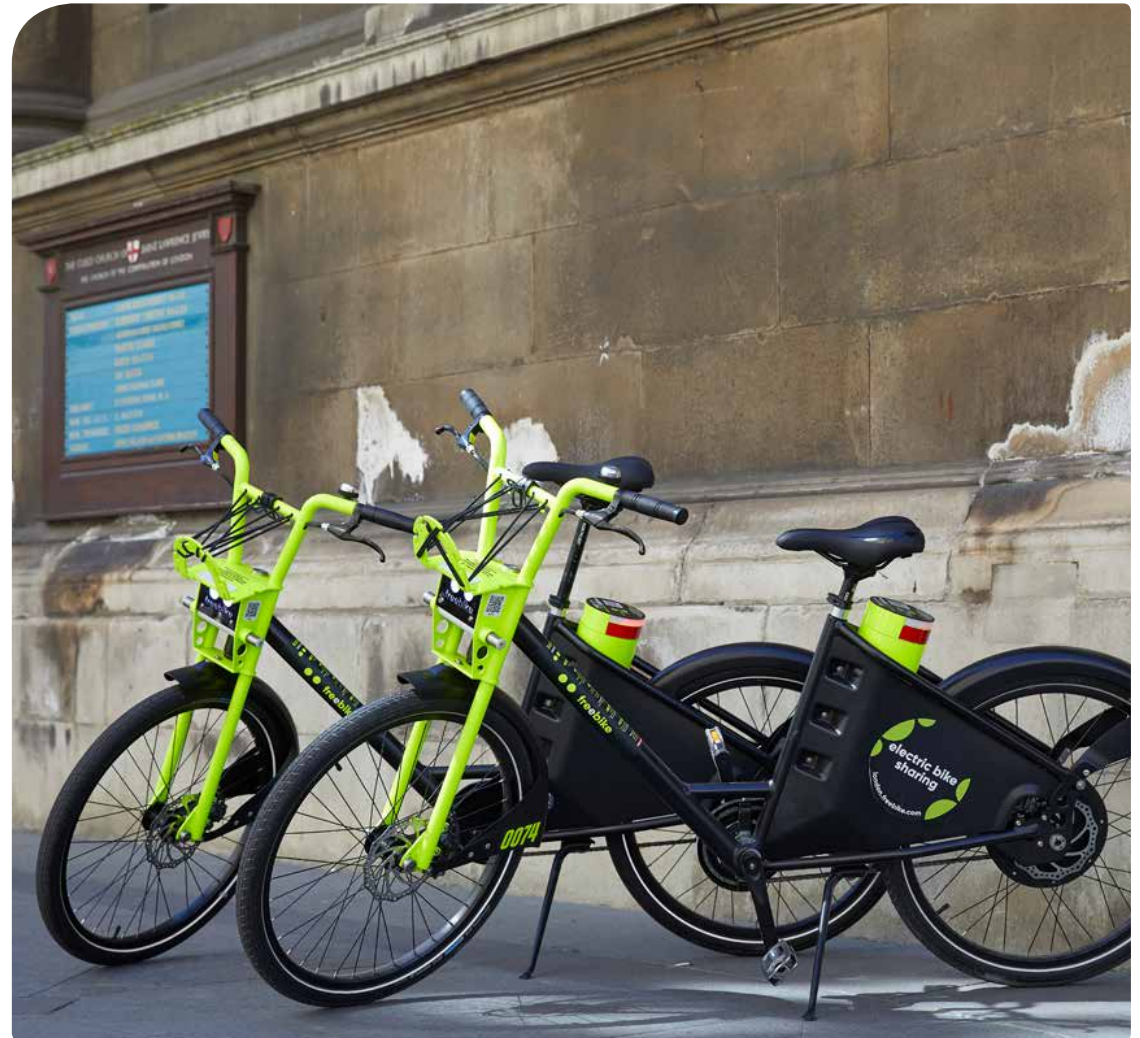
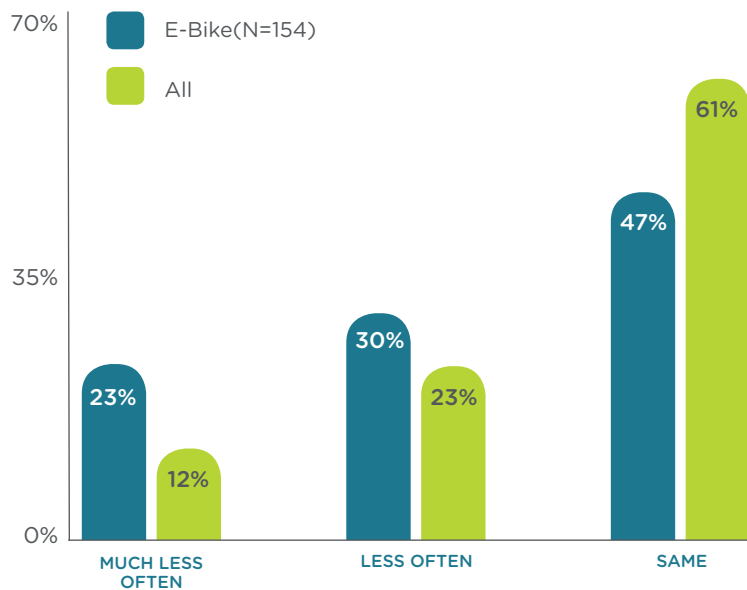
Around a quarter of respondents using e-bikes said they used their cars 'much less often' as opposed to only 12% of the whole sample, and figures were also higher for those saying 'less often'

SHARED EBIKES REDUCE CAR USE EVEN MORE THAN CONVENTIONAL BIKE SHARE



23%

OF RESPONDENTS USING SHARED EBIKES SAID THEY USED THEIR CARS MUCH LESS OFTEN AS OPPOSED TO ONLY 12% OF THE WHOLE SAMPLE



Multi modal trips

Bike share adds flexibility and convenience to journeys, and is often used for either the first or last mile.

For their most recent trip using bike share, 19% of respondents used bike share in conjunction with the bus, and 28% with the train. Looking at this data over 4 years the average is 23% bus / 35% train. The extent to which the car is part of trip

chaining with bike share has varied considerably, as the survey has been influenced by geographical differences in responses. This year, it is only 11% of responses but it has been as high as 40%. The average is 26%.

When asked about their views on the statement "bike share enhances public transport", 89% of respondents agreed.



BIKE SHARE ENABLES USE OF PUBLIC TRANSPORT BY OFFERING A LAST MILE SOLUTION.



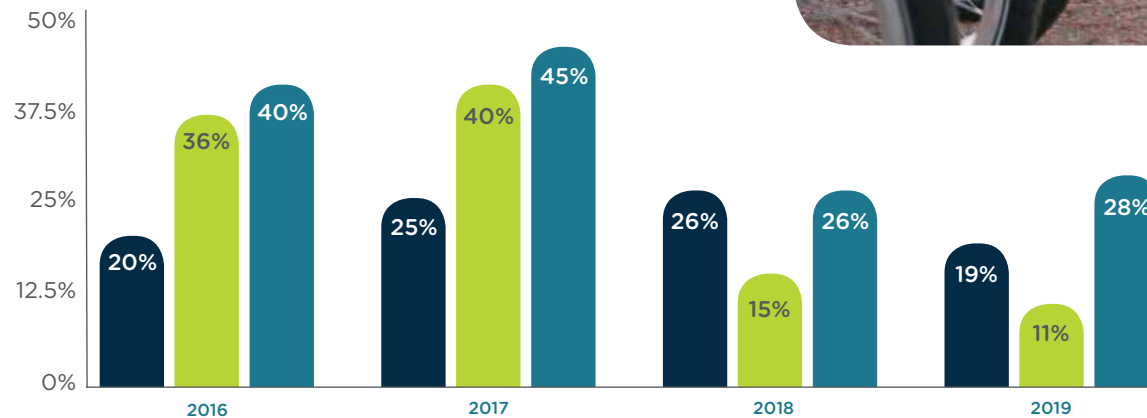
23%

RESPONDENTS USE BIKE SHARE IN CONJUNCTION WITH THE BUS

35%

RESPONDENTS USE BIKE SHARE IN CONJUNCTION WITH THE TRAIN

DATA AVERAGED OVER 4 YEARS OF RESULTS



Trip length

In terms of the trips made using bike share, around a third (32%) of respondents reported their most recent ride was between 5-15mins and just under half (43%) said 15-30mins.

When looking at the time taken to walk to a bike, most people (62%) said it was a less than a 5-minute walk while a quarter said it took them 5-10mins. Slightly lower times were reported from the drop-off location to final destination.

The most common comment from respondents remains requests for wider coverage areas.

Customer satisfaction

When asked to rate the different aspects of the public bike share service, the majority of elements were rated as 'very' or 'fairly satisfactory' by at least 70% of respondents.

A few aspects had lower levels of endorsement such as gears (66% rated these as 'very' or 'fairly' satisfied), customer service (62%) and communications (59%).

Station coverage remained as one of the lowest rated areas, with 27% of respondents saying they were very or fairly dissatisfied. This was also the main topic raised in free comments.

Dockless vs station based

Around half of respondents indicated that they preferred hybrid models of bike share, where bikes are mostly found in stations but can also be found and parked elsewhere. The remainder were split between those who preferred 'free-floating' bike share and those who preferred fully station-based options.

The survey showed that a lack of bikes in particular areas discouraged many users from trying a bike share scheme. Not being able to guarantee an available bike also resulted in many riders giving up on using a scheme prematurely. Lack of coverage at transport hubs, including stations, also made many journeys impractical.

Of those respondents who indicated that they hadn't used a scheme yet (323 respondents), around one third mentioned that this was due to a lack of convenient stations, whilst another 20% said they preferred to use their own bike. Disappointingly, 13% said they hadn't hired a bike as they had encountered a specific problem with the service when trying to hire a bike.



Use of co-mobility services

Respondents were asked about how likely they were to use other shared mobility services, with the options of 'already using it', 'likely to use', 'unlikely to use' and 'unsure/don't know'. 60% said they were 'likely to use' shared electric bikes. 44% were likely to use a monthly account / contract giving use of a range of transport services (Mobility

as a Service), whilst 42% said they were likely to hire shared e-scooters if they were made legal on UK roads. Around a quarter of people said they were likely to use car clubs, ride share, shared taxis and demand responsive bus services.

BIKE SHARE USERS ARE LIKELY TO USE OTHER SHARED MOBILITY SERVICES



60%
SHARED ELECTRIC BIKES



23%
RIDE SHARE (PRIVATE CAR)



42%
SHARED ELECTRIC SCOOTERS



28%
SHARED CARS (CAR CLUBS)

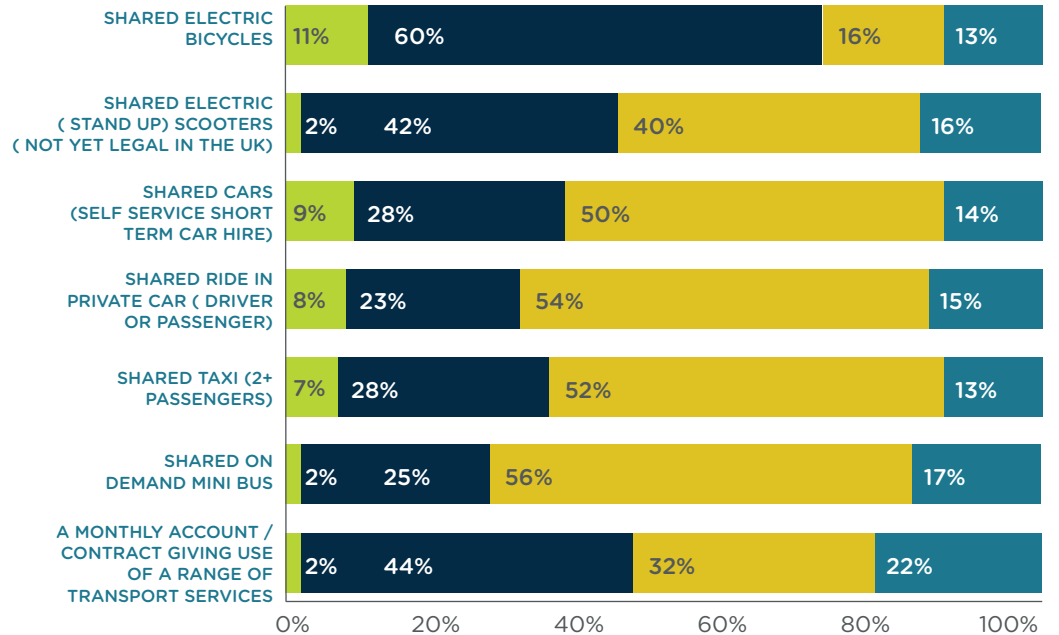


28%
SHARED TAXIS



25%
SHARED ON DEMAND MINI BUS

How likely are you to use the following types of transport (if they were available in your area)?



■ Already using ■ Unlikely to use
■ Likely to use ■ Unsure or don't know



Acknowledgements

Thanks to Conor Walsh and Sally Cairns of Sally Cairns Associates for their support with survey design and analysis.