

Bike share success factors

A guide to the types of locations where bike share can flourish

January 2016



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Acknowledgements

Details compiled from these key industry reports:

- OBIS Report 2011: Optimising Bike Sharing in European Cities
- Institute of Transportation & Development Policy 2013 –Bike Share Planning Guide
- Roland Berger Consultants: Bike Share 4.0
- European Cycling federation Guidance

This document will be reviewed and updated regularly. Please send any comments or feedback to info@bikeplus.org.uk.

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How is success measured?

The document lists factors which have been identified as key to creating a successful bike share scheme. Success can be defined in different ways but in this case we see it as being:

- Sufficient utilisation to cover operating costs alongside additional advertising or sponsorship revenue
- Good customer satisfaction levels

It is also important to know that success is also crucially measured in how the scheme can contribute to key **local policy drivers** which include:

- Relieving pressure on overcrowded public transport routes
- Reducing car use by connecting to public transport and reducing traffic congestion
- Solving the “first and last mile” connectivity issues
- Improving health & wellbeing
- Tackling pollution
- Improving access to jobs and education
- Developing tourism

Exogenous factors

Factors specific to the city which indicate potential for a successful scheme

Key industry reports indicate that the presence of at least some of the following factors are desirable for creating a strong bike share scheme:

- **Residential density**
Population >50,000-100,000
- **Employment**
High employment, large employers such as universities or business parks especially with split sites or a distance from transport interchanges
- **Cycling infrastructure and facilities**
High proportion of routes accessible with visible continuous on or off street cycle lanes to attract new cyclists
- **Attractive tourist destinations connected with cycle paths**
For example Titanic quarter in Belfast, bike stations at the main parks in London
- **Limited or expensive parking**
A lack of convenient and cheap parking reduces the incentive to drive into the city or other destination sites
- **Demographic factors**
Core users are often commuters from transport hubs and tourist but it is beneficial to have a wide the ability to attract a variety of users such as tourists, city residents and students
- **Flat topography**
Flat landscapes make cycling more attractive, although in extreme situations there is the option of adding electric bikes for example Madrid
- **Climate**
A favourable climate is a benefit although schemes are operating in areas with regular snow fall and high rain and winds and some close for the winter

However, in lower density neighbourhoods lacking some of the factors listed above, viable bike share schemes have still been developed with the aid of at least one of the following:

- **A university or college campus (for staff as well as student use)**
- **A strong cycling culture and facilities**
- **Attractive recreational areas**
- **A large employer, business park or government facilities**

These locations can be opportunities for not for profit operators and lower cost systems (for example low tech docking requirements). They often require less rebalancing and with lower density can be more likely to replace car use than just walking and public transport.

Endogenous success factors

These factors are the parts of the strategy and design necessary for bike share to flourish.

Strategic Policy Support

- A long term funding stream to provide a proportion of support after initial start-up grants
- Cycling infrastructure development
- Coordination across public bodies

Diverse funding streams

Private sponsorship or advertising income to complement usage fees and public funding. Where there isn't one overall sponsor, operators can sell advertising space on different areas of the bike and the docking station. Average sponsor income in North America has been around \$1000-\$1400 a bike but Nike's \$10m sponsorship of the Portland scheme is seen as a game changer.

Station density and significant scale

- 300-400m between stations in a minimum area of 10km² with high footfall
- 10-30 bikes per 1,000 population
- The higher the density the higher the market penetration

Quality bikes

Bikes should be durable, attractive and practical, with a front basket to carry bags or groceries, plus easily adjustable seats and good lights. They should also have specially designed parts and sizes to discourage theft and resale.

Simplicity

The process of locating, paying and releasing a bicycle should be user friendly and fast, ideally without pre-registration.

Integration with other transport modes through

- Locations – basing bikes near train and bus interchanges
- Information – providing details of bike hire through via public transport
- Booking and payment technology – in an ideal world city smart cards will include bike access

Attractive pricing

Pricing to encourage short local trips, often £1 or £2 day pass and free first 30 minute hire or a pay by the minute pricing structure.

Operator know-how

With an experienced operator it will be easier to choose the right model to fit the city's needs and tap into experience and share learning from other schemes.

Strong partnerships with a variety of groups

- Businesses users
- Community group or bike shop for maintenance /re-distribution
- Campaign groups for promotion and events
- Links to diverse range of users via community groups

Strong marketing strategy

A targeted comprehensive marketing strategy to raise awareness and encourage take up amongst different user groups.

Resources

The Bikeplus website provides a resource archive including:

- Bike share maps
- Electric bike specifications
- Business planning
- Marketing

www.bikeplus.org.uk