BIKEPLUS
Public Bike Share
Users Survey Results
2017

September 2017
Public Bike Share Users Survey Results 2017

The second annual Bikeplus survey combines robust data, and expert opinion to provide a snapshot of how the UK’s* bike share sector is performing.

Bike share as a mode of transport is becoming more popular. The survey explores how individuals use, and engage with bike share schemes, the perceived health and wellbeing benefits of cycling, and how schemes can influence travel choices by encouraging more sustainable travel behaviours.

This year, the survey looks at a wider demographic area, and includes new questions about electric bike share usage, and the motivations of new riders. Dock-less scheme data will be covered in the 2018 survey.

* Excluding London

23% chose a bike share bike instead of a car for their most frequent trip

23% started or re-started cycling (after a gap of at least 5 years)

43% started riding more as a result of joining the bike share scheme

68% of bike share users stated their main reason for using bike share was exercise, 79% convenience, and 56% time savings

25% used bike share bikes in combination with the bus

40% used bike share bikes in combination with the train

58% MEN

41% WOMEN

56% TIME SAVING

68% EXERCISE AND FRESH AIR

79% CONVENIENCE
The survey shows that at least 66% of riders have begun cycling, or are cycling more as a result of using a bike share scheme. It’s important to note that results vary across the country.

- 23% of survey respondents outside of London said they have either begun or restarted cycling after a break of at least 5 years, as a result of the bike share scheme. In addition, a further 43% of respondents in the UK have increased their use of bikes. So in total 66% of bike share members are riding bikes more as a result of using bike share schemes.

- 46% of bike share members surveyed by TfL in 2016 say they started cycling as a result of the scheme.

- 60% of casual bike share users in London started cycling as a result of using the scheme.

Active bike share users were asked what encouraged them to try a scheme. Convenience, and the opportunity to try cycling without the need for a purchase, along with the benefits of accessing bikes near workplaces, and safe traffic free routes were popular responses. Some respondents noted that they felt the scheme looked fun, and that the low-cost element was a primary factor in choosing bike share over another mode of transport, including a similarly priced bus fare.

18% of respondents indicated that they had purchased a personal bike as a direct result of joining a bike share scheme. Results from TfL confirm this, showing that a scheme can act as an introduction to ownership. For those that already own a bike, or those new to the concept of cycling regularly, the convenience of sharing, and accessibility are key drivers.

The 2016 UK National Travel Survey shows many more men cycling than women (average 22 vs 8 trips per year). The bike share user survey results show a much more even gender balance amongst users, with 58% male and 41% female.
Employment status

The vast majority of respondents were in full or part time employment with less than 1% being unemployed. Those using the scheme typically fell into the income bracket £21-40,000, although 15% of users earned less than £10,000 a year which matches the proportion of students and retired customers.

Gender vs Experience

The data suggested that males were more likely to use a bike share scheme. 58% compared to 41% of females. However, the gender split of those who have started cycling for the first time, or after a break of five years is interesting. Almost 55% of respondents in this category were female. This supports previous Bikeplus survey results which showed that bike share is an attractive option for many underrepresented groups, including women.

Age

There is a wide age spread amongst users with respondents represented in age groups from 18 to 60+. The highest number of respondents (29%) fell in the 31-40 age group but a further 20% were 41-50. It appears that bike share can appeal to all age brackets.
There is a large amount of evidence to support the theory that bike share, and subsequent improved physical activity impacts both mental, and physical health positively. Respondents told us that cycling helped them feel happier, healthier, and more confident. Although the 2017 results aren’t as pronounced as the 2016 survey results, the data allows us to confidently state that active travel helps create a better all-round sense of well-being.

When looking at ethnicity 76% of users were white British, 2% Black, 4% Asian and 14% mixed ethnicity or belonged to another unlisted ethnic group.

Physical and mental health benefits

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Multi modal trips

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

25% of respondents used bike share in conjunction with the bus, and 40% with the train.
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A noticeable change in year on year results indicate that as per recent reports from operators, bike share schemes are being used more, and more to support commuting trips. 22% of respondents used a bike to travel to work at least once a week, and a further 8% of respondents used a bike for a business trip. 12% of those surveyed used a bike at least three times per week to travel to work.

Cycling for pleasure, or fitness remained high on the list of reasons to use a bike share scheme, along with leisure trips, and shopping.

### Trip purpose

<table>
<thead>
<tr>
<th>Trip purpose</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting a friend</td>
<td>8%</td>
</tr>
<tr>
<td>Cycling to the shops</td>
<td>12%</td>
</tr>
<tr>
<td>Personal business</td>
<td>8%</td>
</tr>
<tr>
<td>For pleasure or fitness</td>
<td>18%</td>
</tr>
<tr>
<td>A place of leisure</td>
<td>10.5%</td>
</tr>
<tr>
<td>Cycling to a place of education</td>
<td>5%</td>
</tr>
<tr>
<td>Business travel not commuting</td>
<td>8%</td>
</tr>
<tr>
<td>Commuting</td>
<td>21.5%</td>
</tr>
</tbody>
</table>

### Trip distance

The survey asked respondents to answer a number of questions about their most frequent trip. The typical distance of this trip travelled was between 2 – 4 miles. Most ebike trips showed a similar distance, although this is to be expected as part of a docking station scheme. However, the results did show that ebike users travelling over seven miles make up approx. 16% of respondents, compared to 6% of all users.

### Mode shifts

Users were asked how they previously travelled for the trip that they now most frequently complete by bike share:

- 44% previously walked
- 23% were using the bus before, and 8% switched from the train
- 23% said they previously travelled by car or taxi suggesting potential for bike share in reducing congestion and pollution. This is backed up by question 23 which asks what percentage of short local car trips were replaced by bike share. 47% of respondents said they were replacing at least some trips
- 16% previously used their own bike
- 13% previously didn’t carry out this journey suggesting public bike share is providing new opportunities
Reasons for opting to travel by bike share

As with the 2016 Bikeplus and TFL survey results, convenience, exercise and fresh air were the top reasons for choosing bike share. When analysing results from responses rated important, or very important, we noticed:

- 68% said gaining exercise, 79% said convenience, and 69% said fresh air. The top three reasons for joining were echoed in the London TFL survey.
- Environmental reasons have become more important, with 68% of respondents choosing this option. This could possibly be due to an increased awareness of air quality issues.
- Avoiding congestion / parking problems (new category) was joint 5th place, along with time saving at 56%.

- 51% of respondents experienced a direct time saving benefit as part of their most typical bike share trip. 10% experienced an increase, and 39% reported that their journey time remained the same.
- 55% of respondents reported that using a bike share scheme saved them money.
- A significant number liked being able to avoid the worry of maintenance (36%), storage (44%), and theft (45%).
- An additional new question was added to the 2017 survey asking how important bike share was as a back up to a usual mode of transport. For example, a car being out of action, or a bus strike.

Electric bike users

Two public bike share schemes now offer electric bikes. Oxford has a mixed fleet, and Exeter has a fully electric ebike scheme. We hope to learn more about the impacts of convenient low-cost access to this emerging technology as more schemes add ebikes. It should be noted that initial results are based upon the answers of 57 respondents. We recognise that this is a small sample, and would encourage readers to consult other studies including the Department for Transport funded Shared Electric Bike Programme information, all available on the Carplus Bikeplus website.

Preliminary results suggested that the primary reasons for choosing an ebike over a normal bike include: cycling up hills (71% of users), avoiding fatigue or getting sweaty (60%) followed by travelling longer distances (59%). 34% said they were using it as a tool to decide whether to buy an ebike.
Customer satisfaction

When asked to rate the different aspects of the public bike share service, the majority of respondents (at least 75%) rated all aspects of the service as either ok, good, or excellent. Station coverage continued to be one of the lowest rated areas, with 15% of respondents rating facilities as poor. Bike gears were also rated as poor.

Over 90% of respondents rated value for money as either ok, good, or excellent. Compared to the Passenger Focus National survey 2017, regional rail services scored an average of only 60%.

Barriers to scheme usage

The survey showed that a lack of bikes in particular areas discouraged many users from trying a bike share scheme.

Survey methodology

This survey was produced in conjunction with Bikeplus, UK bike share operators, and Local Authority representatives. It was distributed via email, and social media to all Hourbike, nextbike, and Smoove / ITS schemes in the UK between the 5th May and the 18th June 2017. In total, 649 responses were received, and results span 18 schemes across areas including, but not limited to Liverpool, Reading, and Glasgow. 56% of respondents used a scheme on a casual tariff, and 36% on an annual membership. The survey excludes London, but has four overlapping questions with the TfL survey for comparison.

The survey questions and full responses are available on the Bikeplus website.

Technology

94% of respondents owned a smartphone. 87% joined a scheme via a mobile or laptop device, rather than by phone, or terminal. However, 55% of respondents were prompted to join a scheme from an on-street docking presence. 61% of those surveyed were interested in using an e-bike in the future, and three quarters indicated a willingness to pay a higher tariff for this option (a 50% increase from last year).

References

TFL Members Survey 2016

TFL Casual Users Survey 2016

National Travel Survey 2016