

Barclays Cycle Hire Casual Users Profile – Q2 2014/15



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1

Key findings



Summary

- Overall satisfaction has increased (from 82 to 85), regaining the same level as two years ago. Recommendation has reached a record high level (from 89 to 91).
- Practical aspects (convenience, ease of use and availability of bikes) remain the main attraction of the scheme. The fun aspect, although still a major incentive, is slightly less important than before (fewer first timers). On the negative side, the lack of spaces and bikes are most commonly mentioned, but this year there were fewer comments about technical problems at terminals and payment issues.
- There has been a steady decline in first time users and a corresponding increase in casual users using the scheme at least once a week.
- Awareness of BCH membership was very high, but only a quarter were aware of the new self-guided bike rides available online.
- Although the BCH scheme has been extended to the West since last year, the profile of Casual users has remained very similar: they are mainly male, young, white and living in London.

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Background and objectives



Background and objectives

Research objectives are to:

- Form a better picture of who BCH casual users are in order to inform service development – What is their profile? Where do they live? Are they travelling alone or with others? Frequency of using Barclays Cycle Hire?
- Understand journey purpose, reasons for deciding to hire a bicycle.
- Satisfaction with the scheme and likelihood to recommend.

Wave 3 interviewing took place with 90 shifts at Central zone docking stations, 34 in the Eastern zone and 36 in the Western Zone between 7th July and 13th August 2014.

A total of 1179 interviews were completed with casual users bringing their bicycles back to the docking station after making a journey. If the docking station was full, interviewers approached individuals hiring a bicycle, but only if they have previously hired a bike that same day.



Background and objectives

The proportion of respondents about to hire a bike and who had just docked a bike is:

- Respondent just about to **hire** a bike: 27%
- Respondent had just **docked** a bike: 73%

Number of interviews:

	Target	Achieved (unweighted)	Achieved (weighted)
Central Zone	700	767	857
Eastern Zone	200	213	138
Western Zone	200	199	184
Total	1100	1179	1179

Weighting was applied on busy/average/quiet stations within Central, Eastern and Western zones to represent casual bike usage :

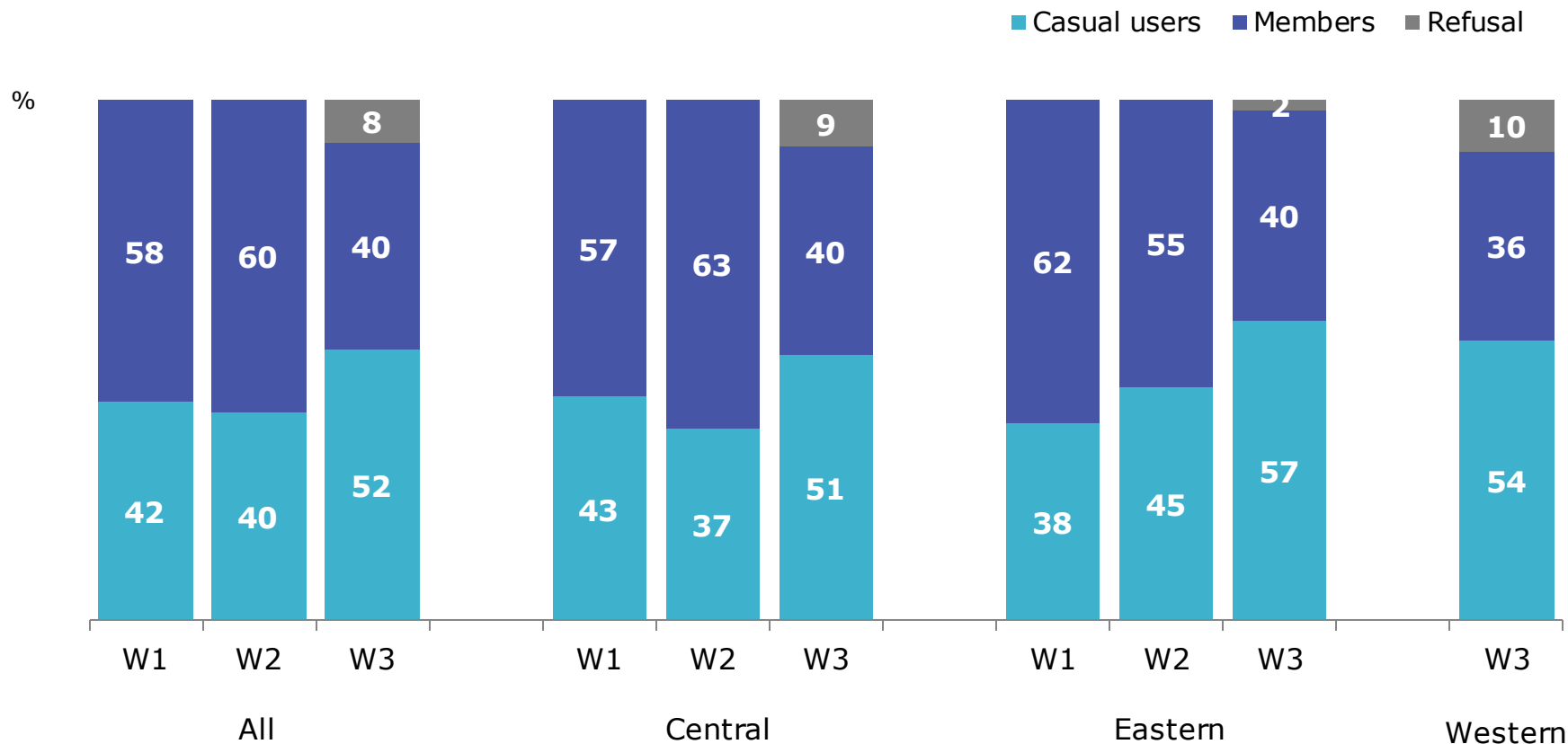
	Weight	
Central Zone	Busy (600+ dockings in the month)	54.75%
	Average (300-599 dockings in the month)	14.96%
	Quiet (<300 dockings in the month)	2.98%
Eastern Zone	Busy (600+ dockings in the month)	6.27%
	Average (300-599 dockings in the month)	3.86%
	Quiet (<300 dockings in the month)	1.57%
Western Zone	Busy (600+ dockings in the month)	7.19%
	Average (300-599 dockings in the month)	6.54%
	Quiet (<300 dockings in the month)	1.87%
TOTAL	100%	

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Profile of casual users, and comparison with Member profile



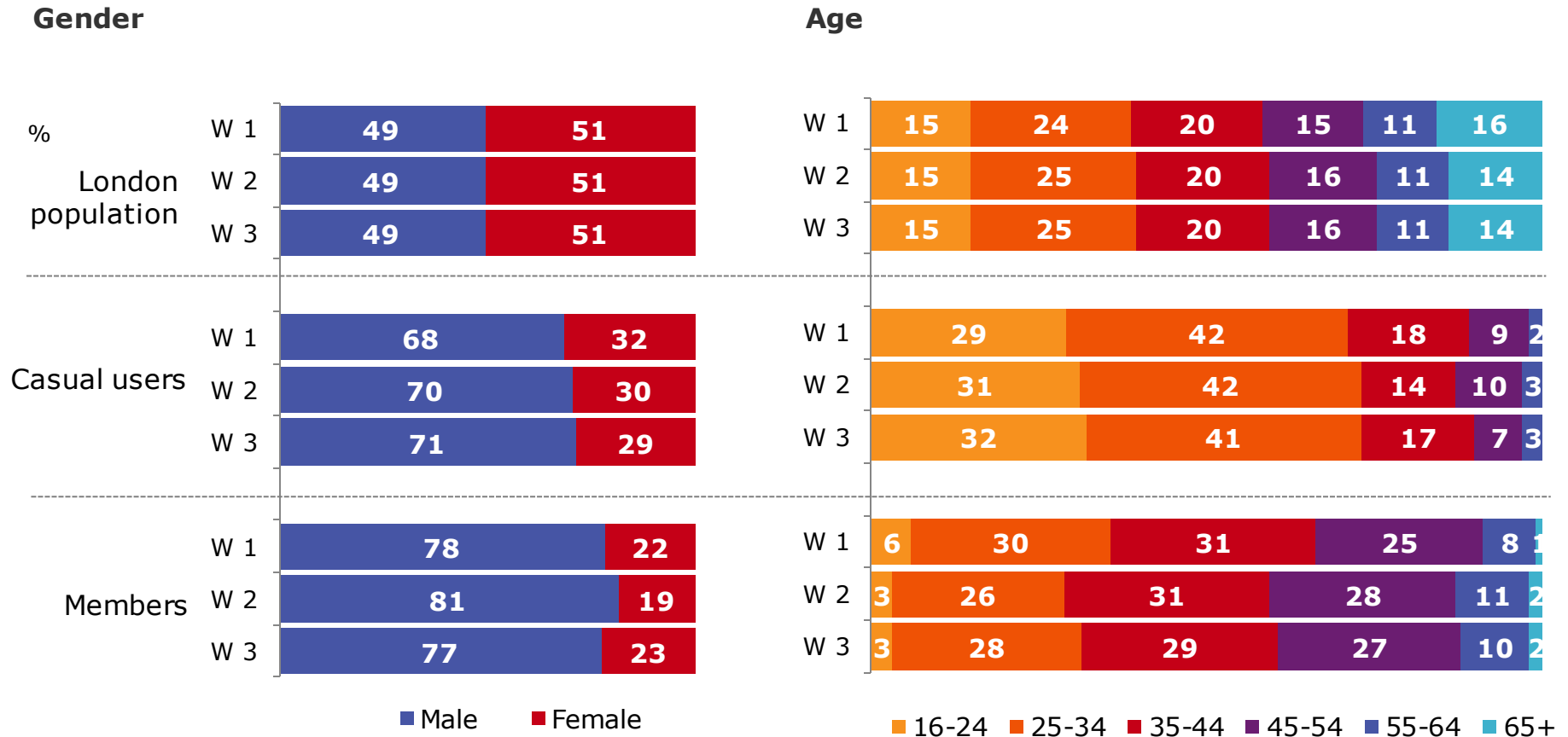
During the fieldwork at docking stations, interviewers recorded the number of BCH members and casual users they approached. Casual users accounted for 52% of all those approached in wave 3.



Base: in W1, the counts were based on about half the fieldwork, in W2 counts were based on all fieldwork recorded manually on paper by interviewers. In W3 counts were including the the survey script: 2546.



BCH members and casual users are more likely to be male than female. Compared to the general London population, and to members, casual users are younger.

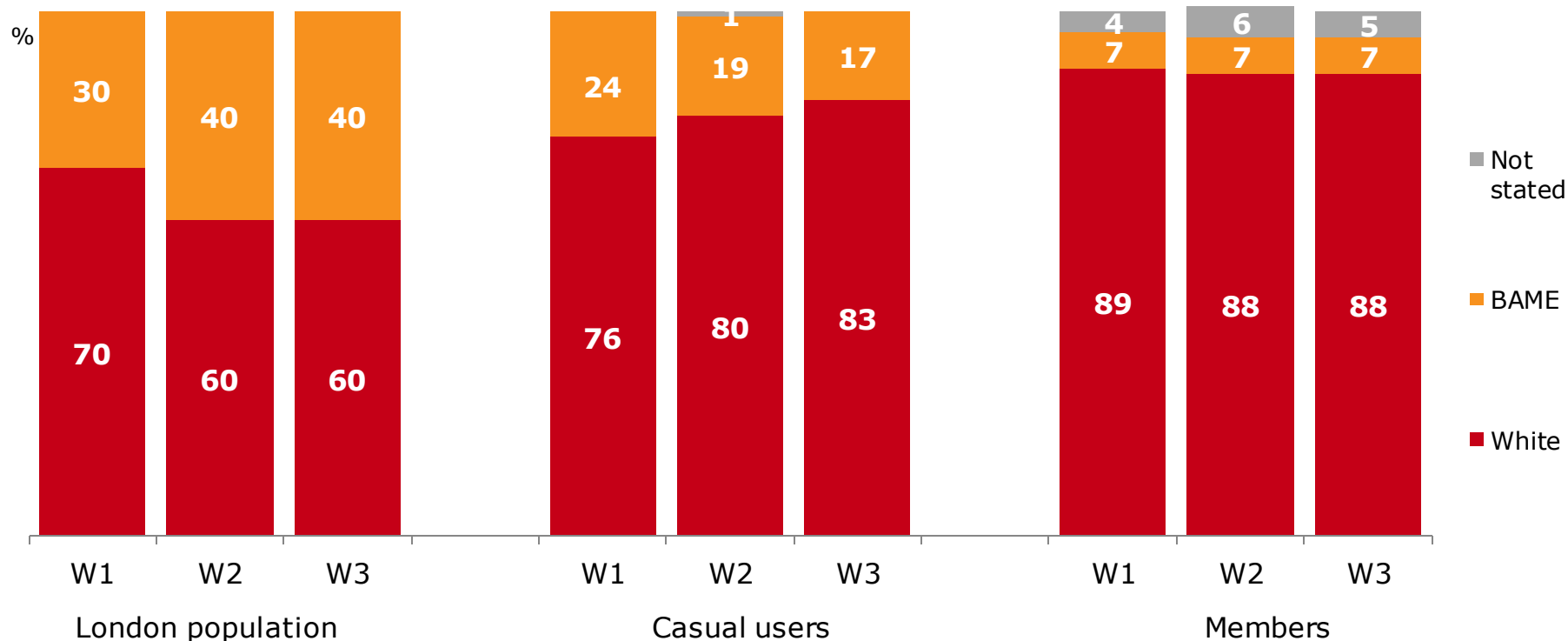


Q30. Interview: code respondent's gender / QK1 Gender. Are you...?
 Q3.And which of these age categories do you fall into? / S2.How old are you?
 Base: Casual users W1: 1111; W2 1109; W3 1179; members W1: 4789; W2: 371; W3: 2998; London population W2 Source 2011 census.

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In comparison to the general London population, BAME people continue to be under-represented among both BCH members and casual users.

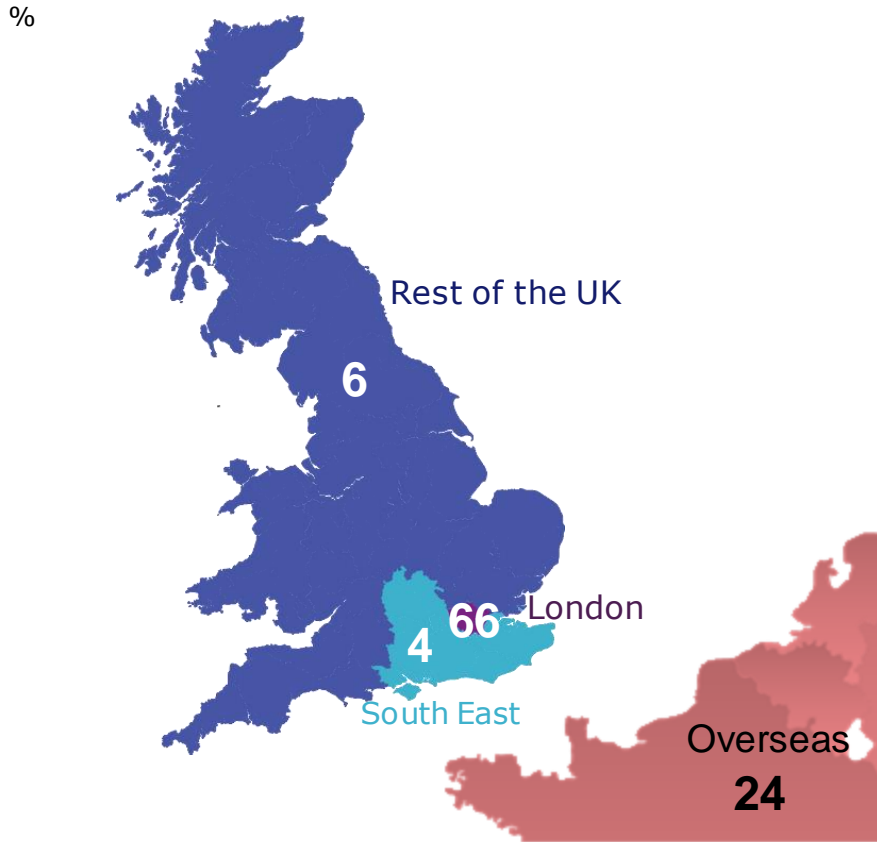


Q25.How would you describe your ethnicity? / Q8d And are you...?

Base: Casual users W1: 1111; W2 1109; W3 1179; members W1: 4789; W2: 3717; W3: 2998; London population W2 Source 2011 census.



Most casual users are London residents, but a quarter live overseas (although not shown, this has changed very little over time). Of the overseas users, USA is most common, followed to a lesser extent, by Australia and Italy.



Country*	%
USA	15
Australia	9
Italy	8
Canada	7
Spain	7
France	6
Germany	6
China	4
Netherlands	4
United Arab Emirates (UAE)	3
Other	12

* All quoted by more than 3% of overseas respondents

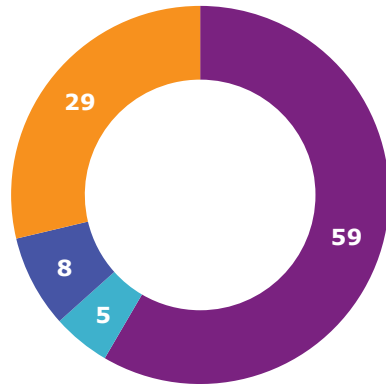
Q4. Where do you live?

Base W3: Casual users: All 1179; Overseas resident: 276

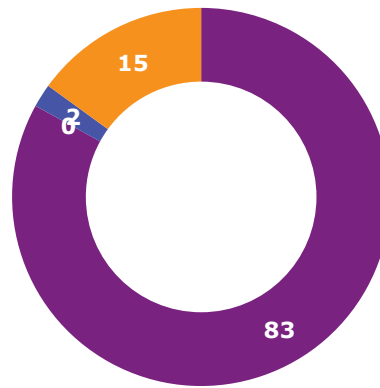


The Central zone has the highest proportion of overseas visitors (29%), compared to only 15% in the Eastern zone and 10% in the Western zone. The number of overseas visitors in the Eastern zone has increased (from 7%) since wave 2.

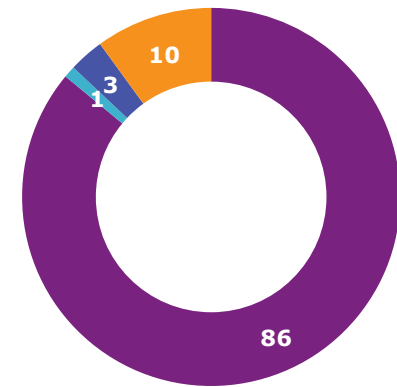
Central zone



Eastern zone



Western zone

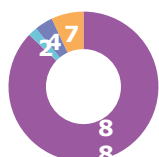
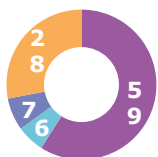


Central zone

Eastern zone

- London, including Greater London
- South East England but not London
- Elsewhere in the UK
- Overseas

W2

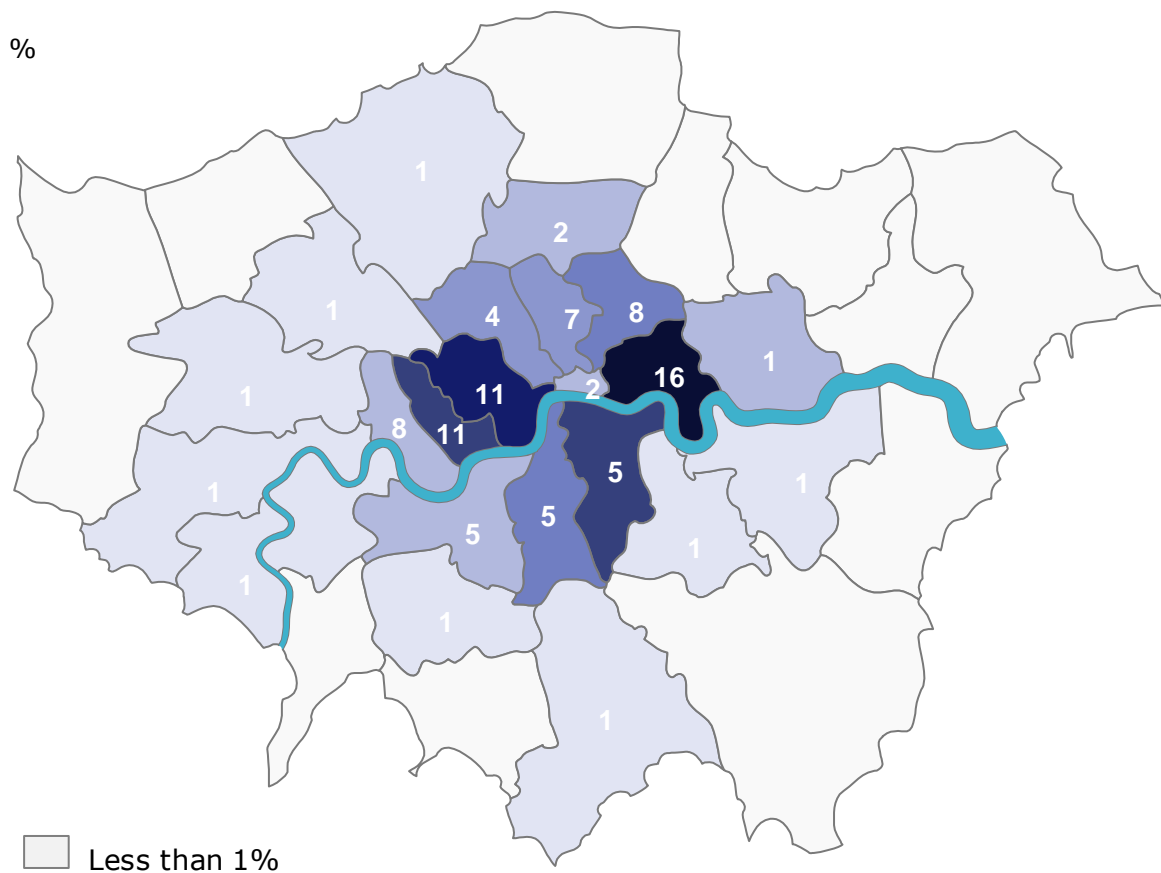


Q4. Where do you live?

Base: Casual users W3: All 1179; Central: 767; Eastern: 213; Western: 199



Casual users living in London mainly reside in the most central boroughs. Since wave 1, there has been an increase in the proportion of users living in the Western zone - Kensington & Chelsea, Hammersmith & Fulham and Wandsworth boroughs.



Borough	% residents W1	% residents W2	% residents W3
Tower Hamlets	19	18	16
Kensington and Chelsea	6	9	13
City of Westminster	14	12	11
Hackney	7	7	8
Hammersmith and Fulham	1	4	8
Wandsworth	2	3	8
Lambeth	6	7	7
Islington	3	6	7
Southwark	10	9	5
Camden	7	6	4
City of London	3	3	2
Newham	1	2	1
Barnet	1	1	1
Brent	2	1	1
Ealing	1	1	1
Greenwich	2	1	1
Lewisham	2	1	1
Haringey	2	2	0
Croydon	1	1	0
Hounslow	0	1	0
Merton	0	1	0
Richmond-upon-Thames	1	1	0

Q4. Where do you live?

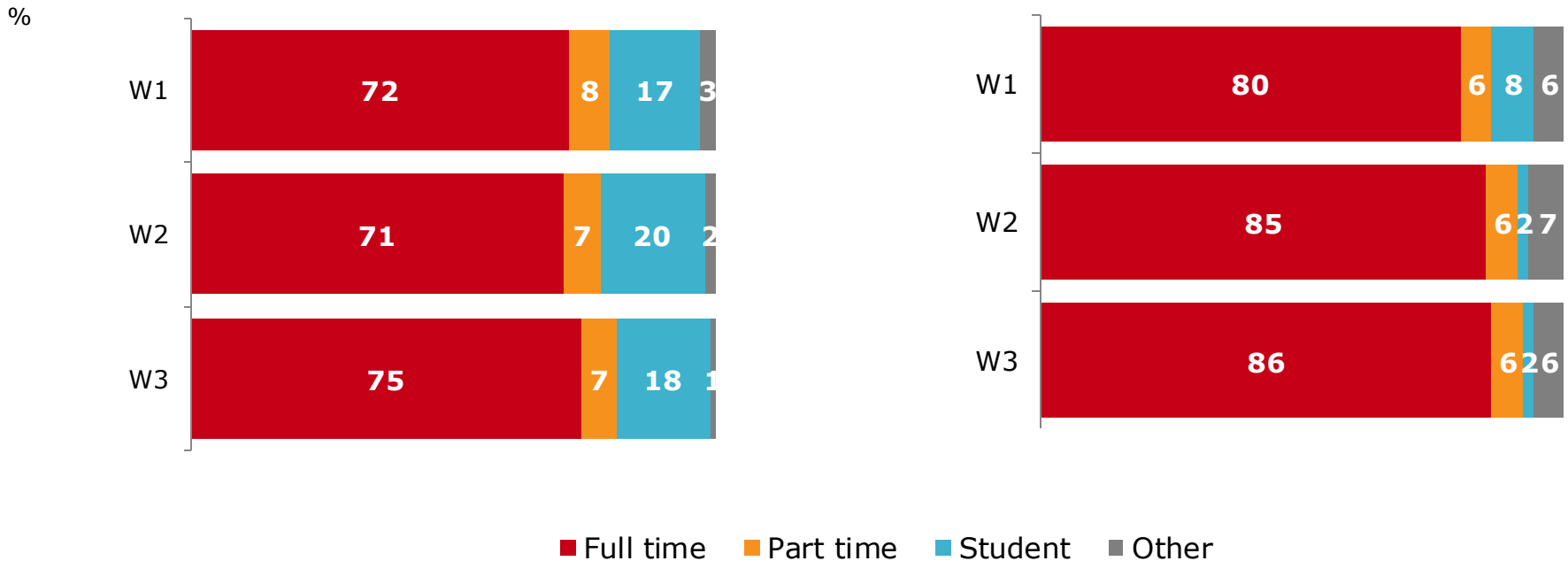
Base: Casual users living in London: W1: 728; W2: 694; W3: 794



BCH members are more likely to work full time than casual users. Although decreasing slightly since last wave, there is a much higher proportion of students among casual users than members.

Casual users

Members



Q27. Are you...? / QK4. Are you?

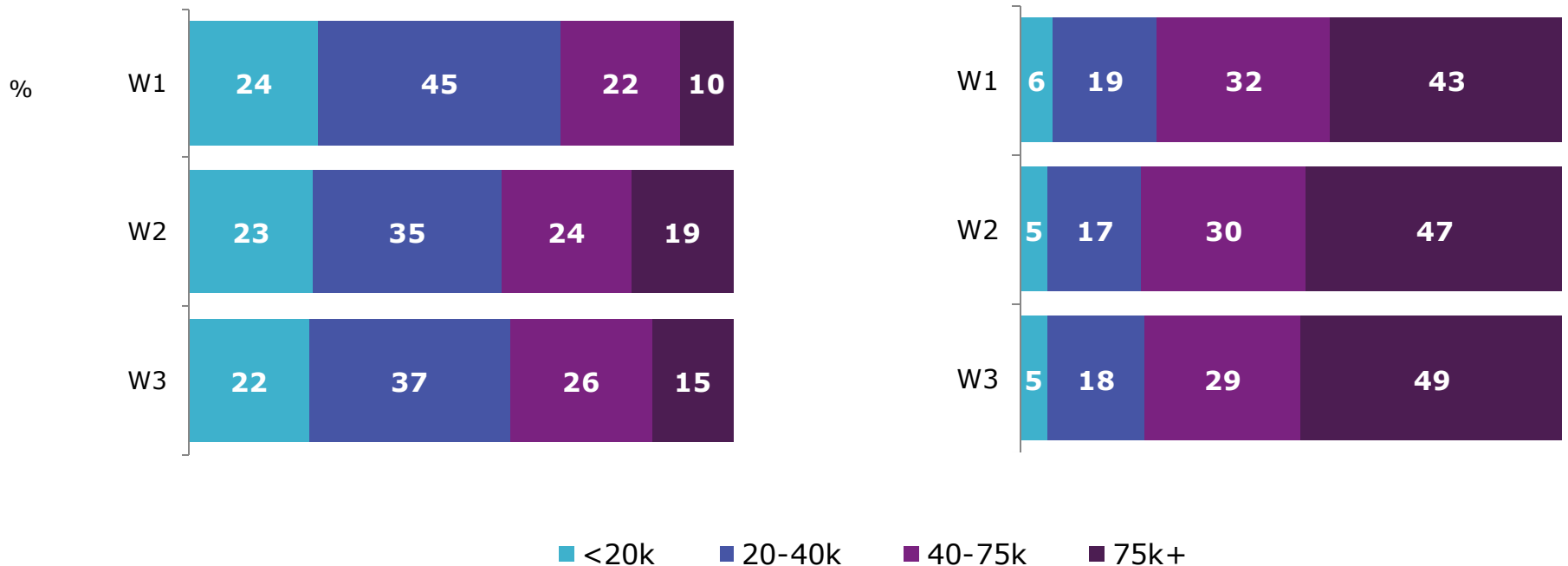
Base: Casual users W1: 1111; W2 1109; W3 1179; members W1: 4789; W2: 3717; W3: 2998



Casual users generally have lower incomes than members; nearly half of members have a household income of £75,000 or more, compared to 15% of casual users. Over time, there has been a shift towards higher incomes among both groups.

Casual users

Members



Q28.What is your total gross annual household income? / QK5. Please indicate your approximate annual household income, before tax and other deductions.

Base: All who provided an answer: Casual users W1:645; W2 759; W3:947; Members W1:2164; W2: 2907; W3: 2410

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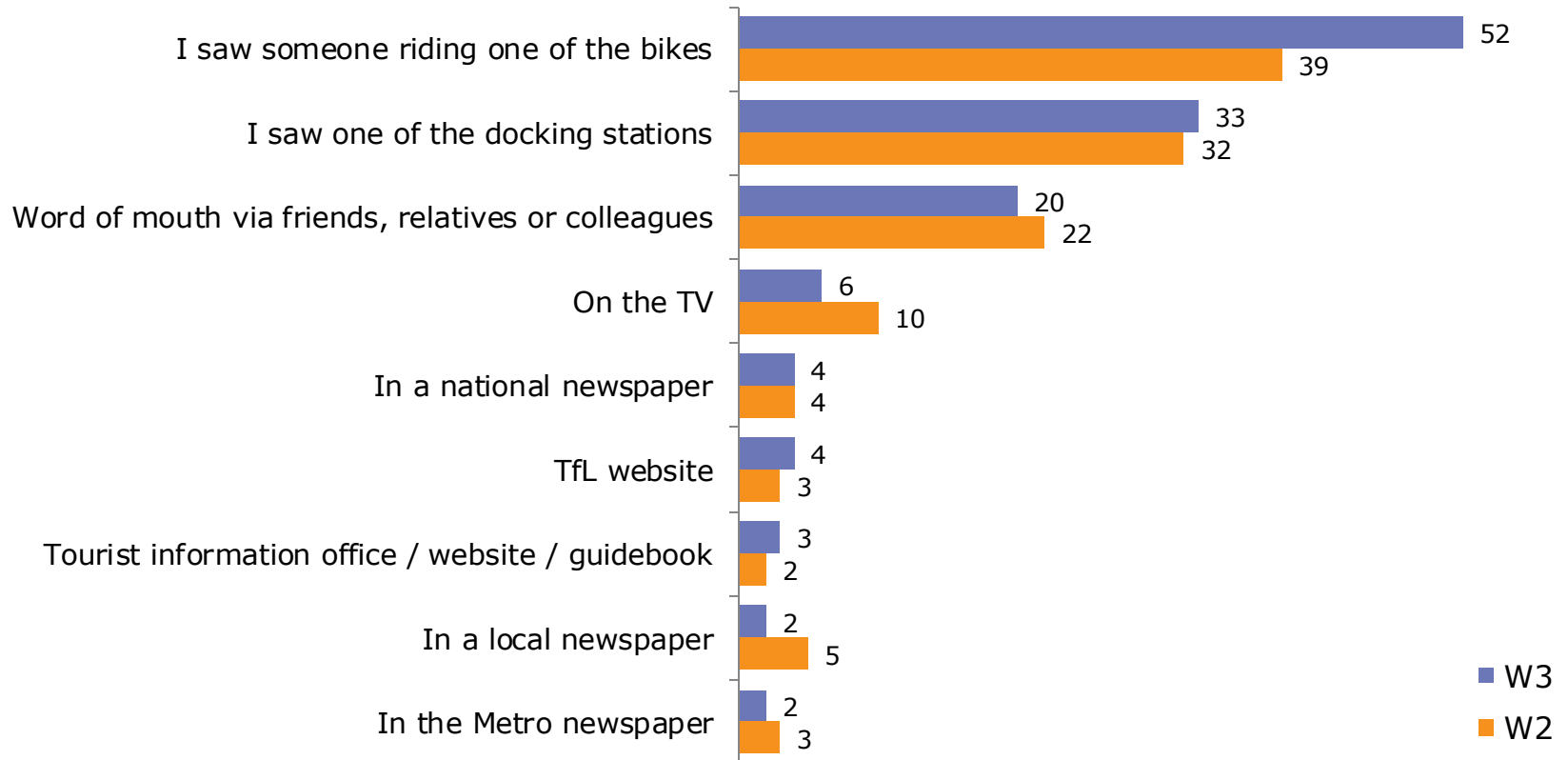


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How casual users use BCH

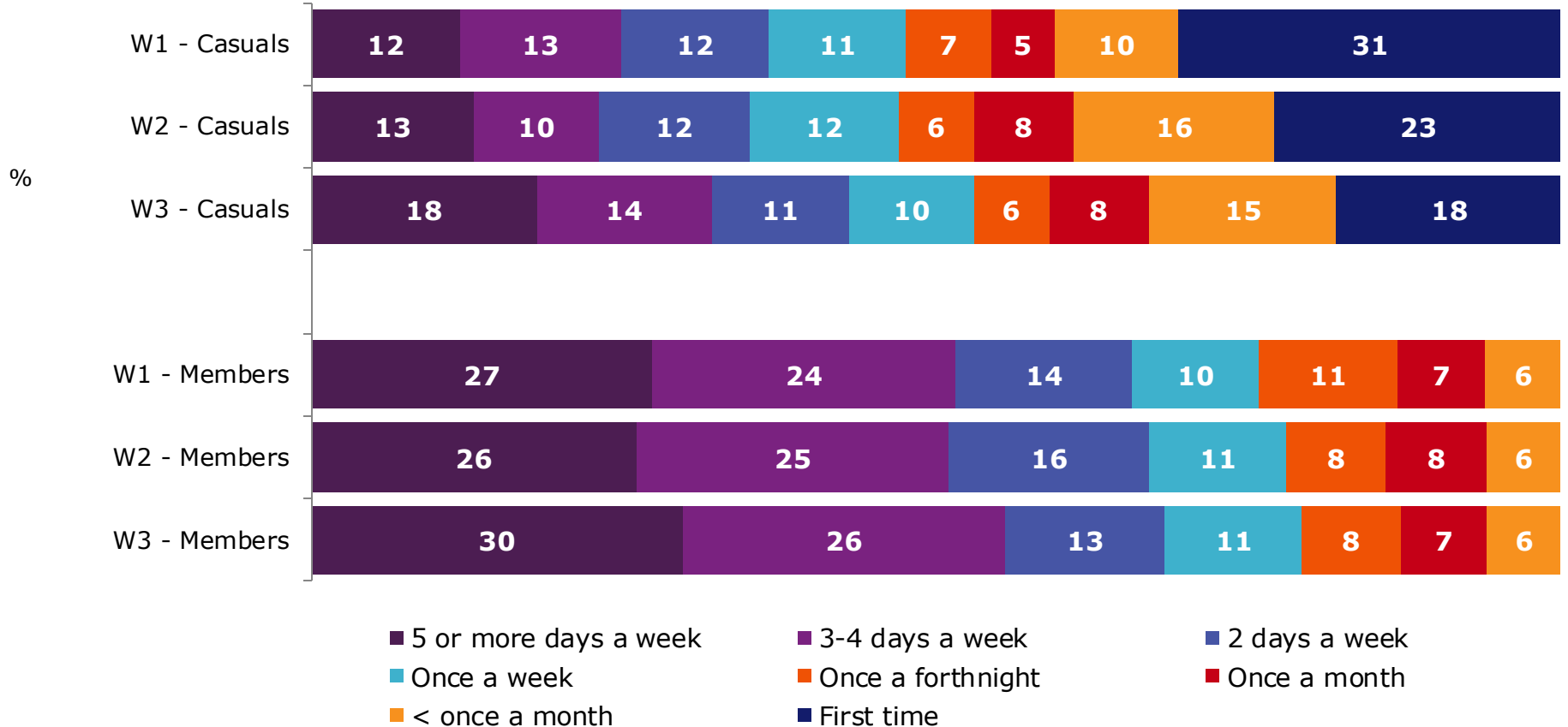


The majority of casual users first heard about the BCH scheme by seeing a bike, while a third saw one of the docking stations. Compared to wave 2, there is a general decrease in the number who heard of the scheme via other sources.



Q22.How did you first hear about the Barclays Cycle Hire scheme?
Base: Casual users W2: All 1109; W3: 1179

Over time, the proportion of first time casuals has decreased and they now account for less than a fifth of all casual users (compared to almost a third two years ago).

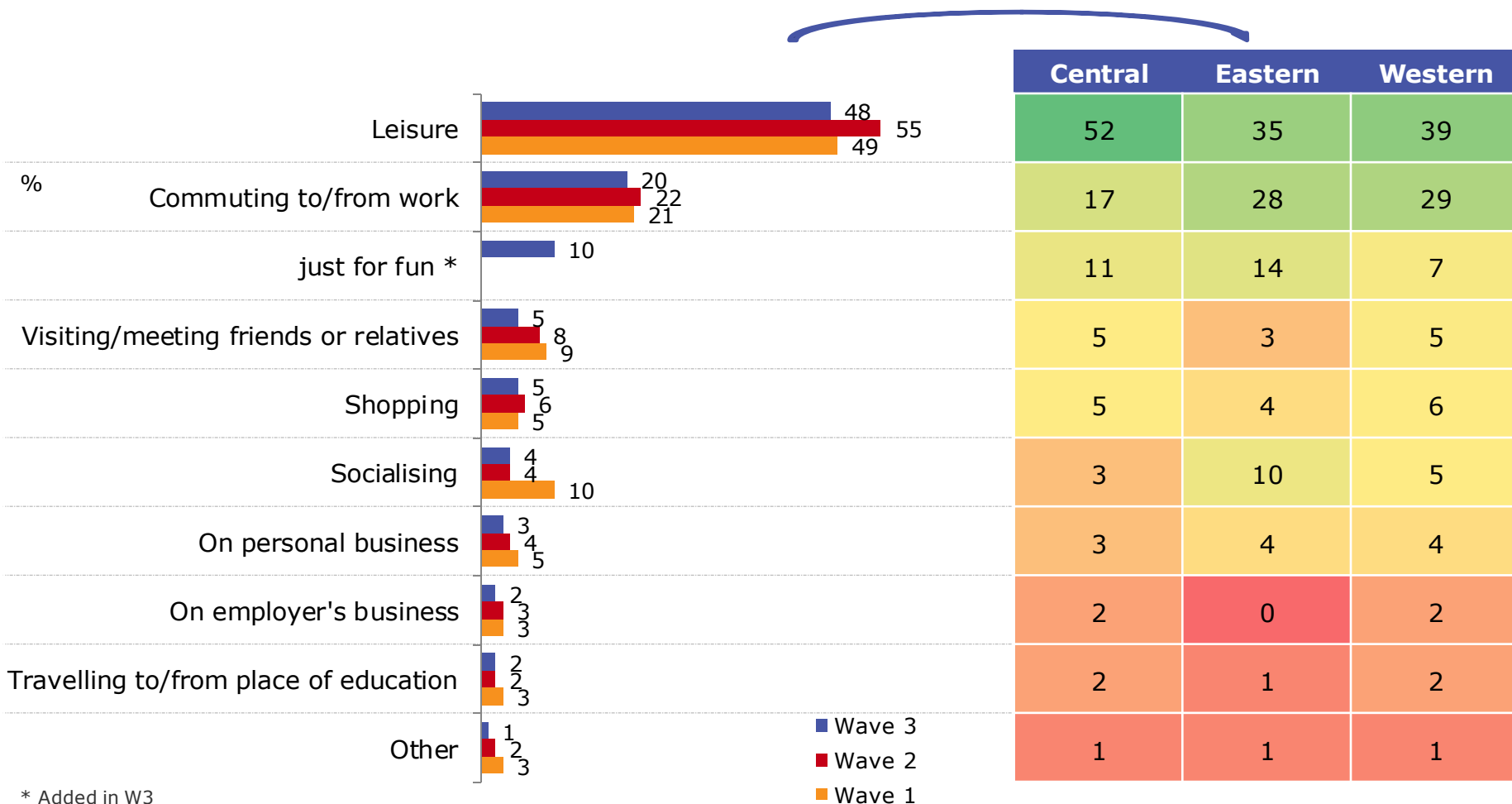


Q23.How often do you use Barclays Cycle Hire to get around London? / QJ2a.How frequently do you make each of the following type of trips using Barclays Cycle Hire?

Base: All casual users W1: 1111; W2 1109; W3 1179; members W1: 4789; W2: 3717; W3: 2998 ©TNS



Leisure remains the main reason for using BCH (particularly in the Central zone), followed by commuting (particularly in the Western and Eastern zones).



* Added in W3

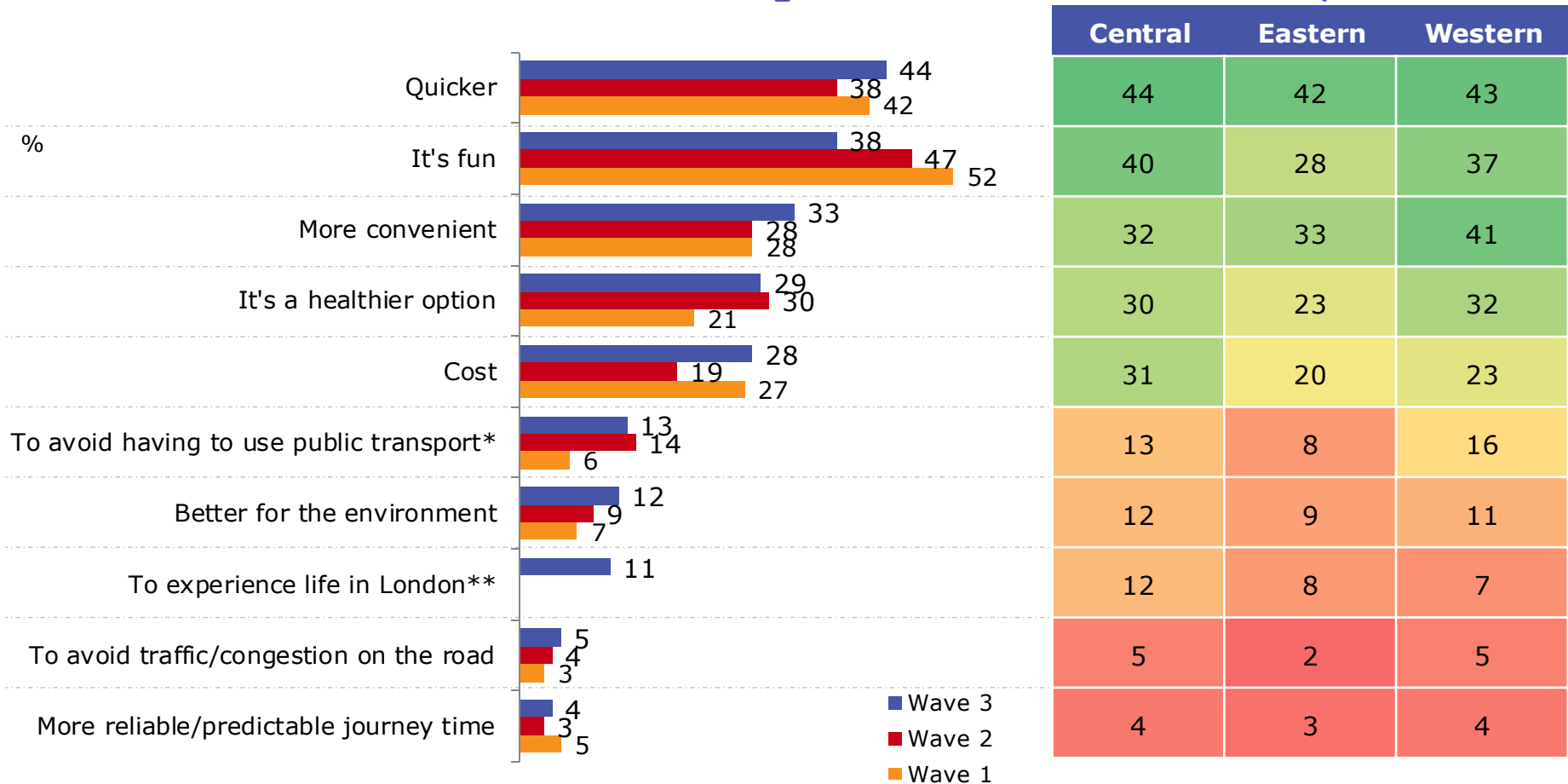


Q9. What is the main purpose of the current trip that you are making today using Barclays Cycle Hire?

Base: Casual users W1 All: 1111/ W2 All: 1109/ W3: All 1179; Central: 767; Eastern: 213; Western: 199



Practical aspects drive users to choose BCH i.e. quicker (44%), more convenient (33%) and cost (28%). Since wave 1 there has been a decrease in users choosing BCH because 'it's fun' (52% to 38%).



Q10. Why did you choose to make this trip using Barclays Cycle Hire?

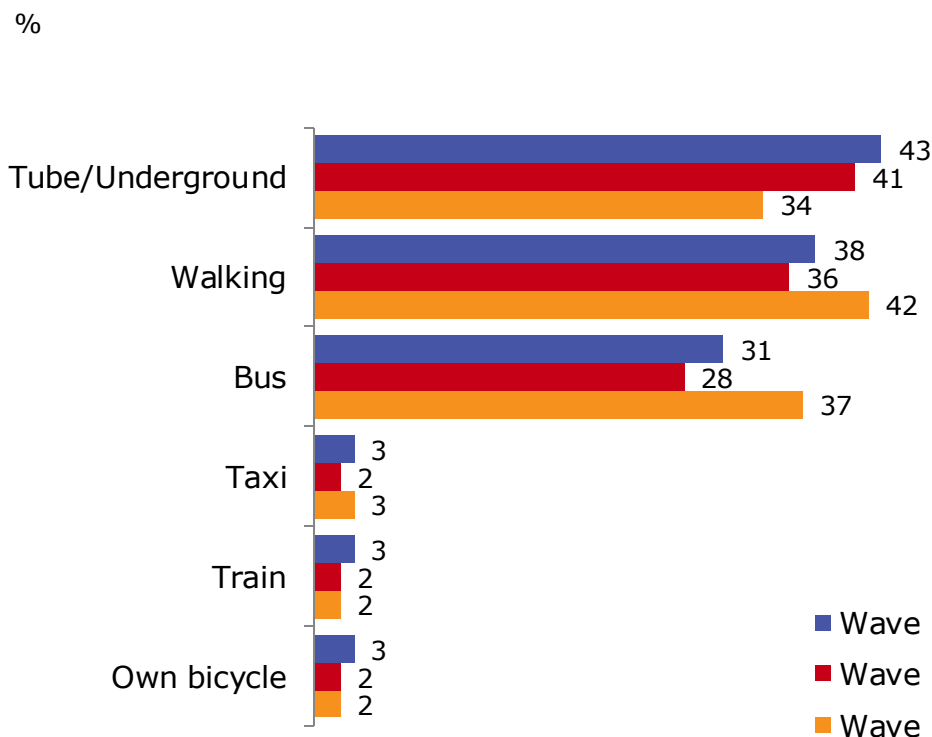
Base: Casual users W1 All: 1111/ W2 All: 1109/ W3: All 1179; Central: 767; Eastern: 213; Western: 199

* W1 wording: To avoid crowding on public transport

** Added in W3



If BCH hadn't been used to make the journey, the underground, walking or bus would have been used instead. In the Central zone, the underground is the main alternative to BCH. In the Eastern zone, walking is the main alternative and in the Western zone the main alternative is the bus.



	Central	Eastern	Western
Tube/Underground	47	35	31
Walking	38	41	34
Bus	29	28	44
Taxi	3	0	5
Train	2	3	4
Own bicycle	2	2	6



Q11. If you hadn't used Barclays Cycle Hire to make the journey, how would you have made it otherwise?

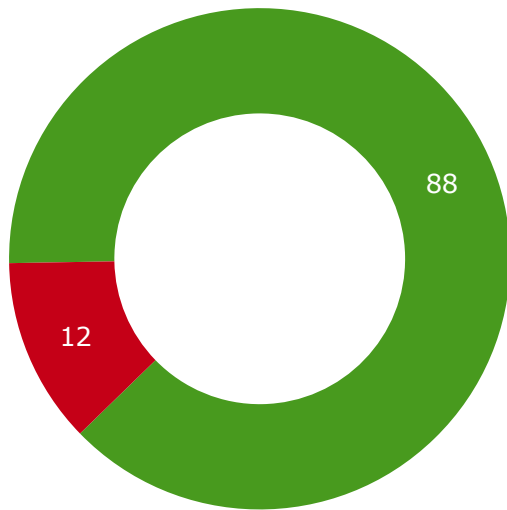
Base: Casual users W1 All: 1111/ W2 All: 1109/ W3: All 1179; Central: 767; Eastern: 213; Western: 199



Almost nine out of ten casual users who live in the UK and travel at least once a fortnight are aware of the membership scheme (increased from 80% last year) and almost half of them are interested in membership. Three quarters of casual users are not aware of the 'self guided bike rides' available online.

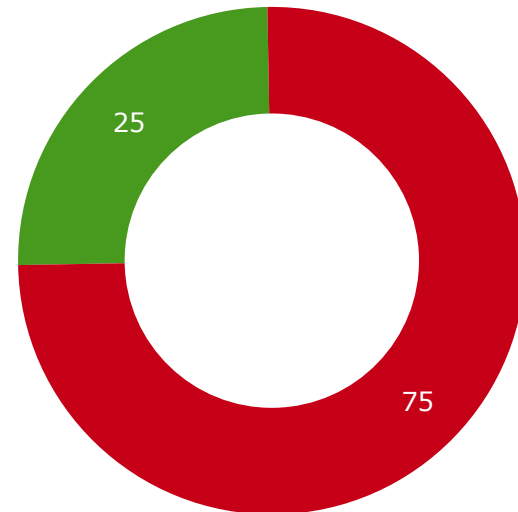
Awareness of membership
(among UK residents using BCH
at least once a fortnight)

%



■ Yes ■ No

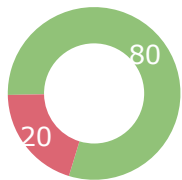
Awareness of BCH self-guided bike rides



■ Yes ■ No

44% of UK residents using BCH at least once a fortnight are interested in becoming a member

W2

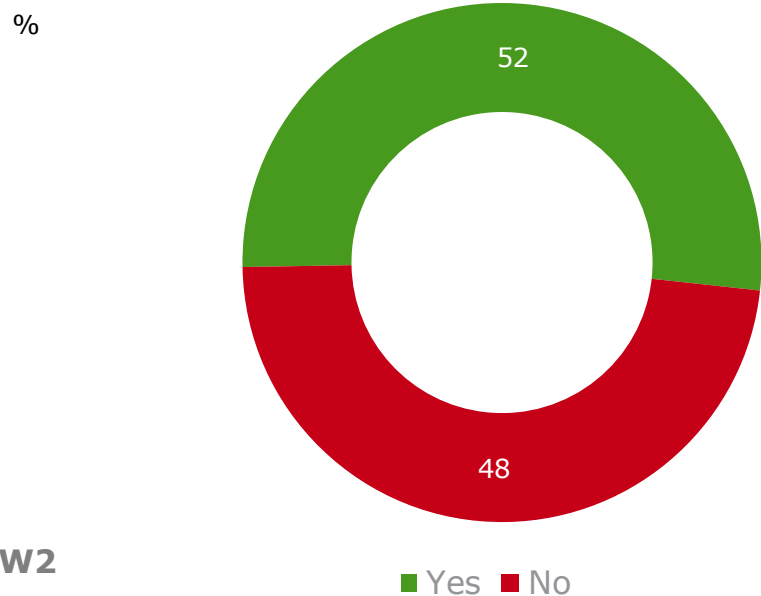


Q23a. Are you aware that you can register as a member to get a key for quicker access to the bikes, and it could save you money?/ Q19. Which, if any, have you done as a result of the introduction of the Barclays Cycle Hire scheme? Base: living in the UK and using BCH once a fortnight or more: W2: 538; W3: 613 Q36. Are you aware of the Barclays Cycle Hire self-guided bike rides, available online? Base: Casual users W3: 1179

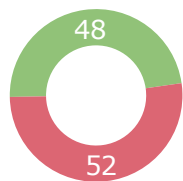


More than half of all casual users own a bicycle and almost two thirds own an Oyster Card. Less than 10% say they do not use public transport in London.

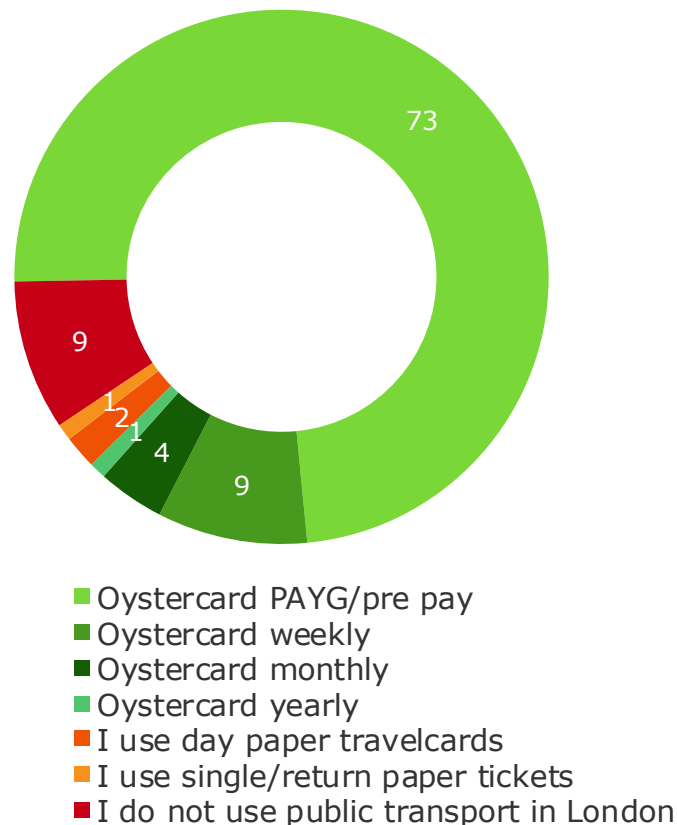
Ownership of a bicycle
(among all casual users)



W2



Ownership of an Oyster Card



Q24. Do you own a bicycle? / Q36. Are you aware of the Barclays Cycle Hire self-guided bike rides, available online? Base: Casual users W2: 1109, W3: 1179
 Q35. Do you have an Oyster card? Base: Casual users W3: 1179

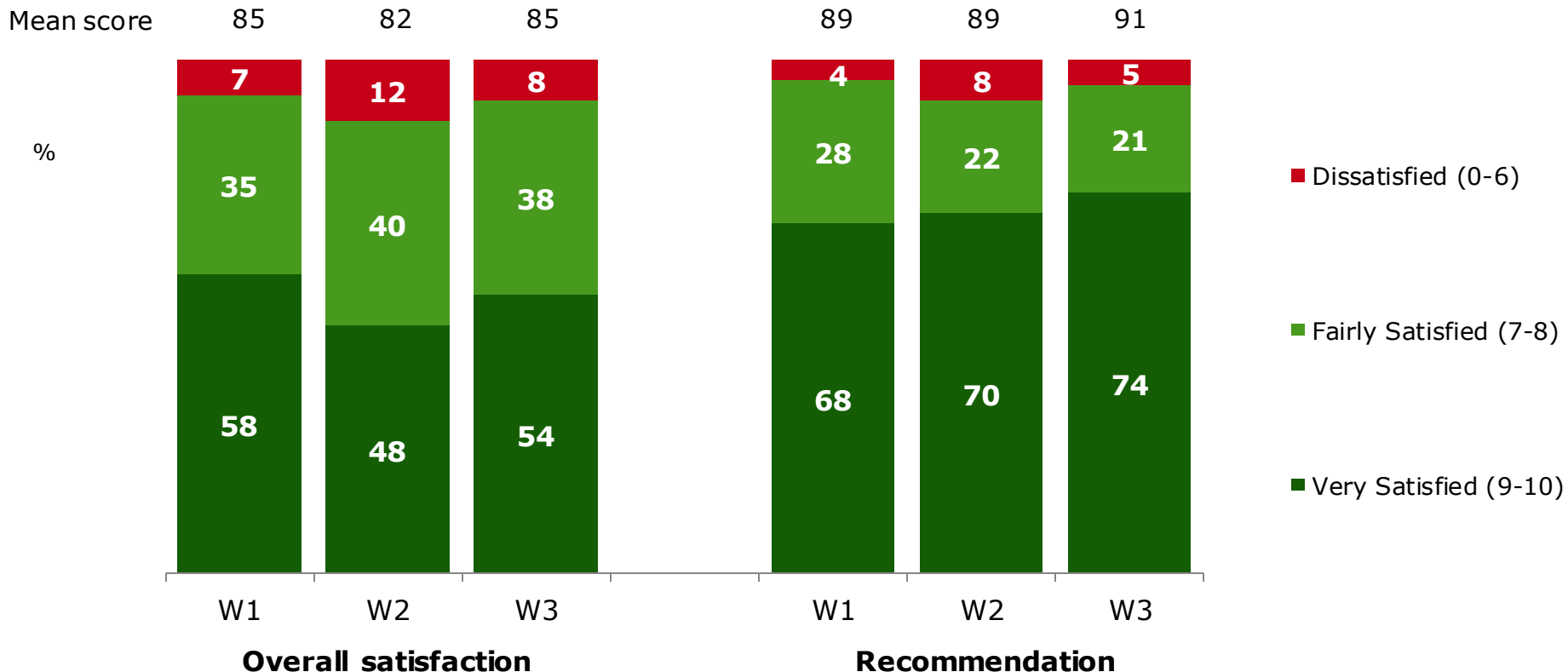


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Satisfaction with BCH/ likes and dislikes



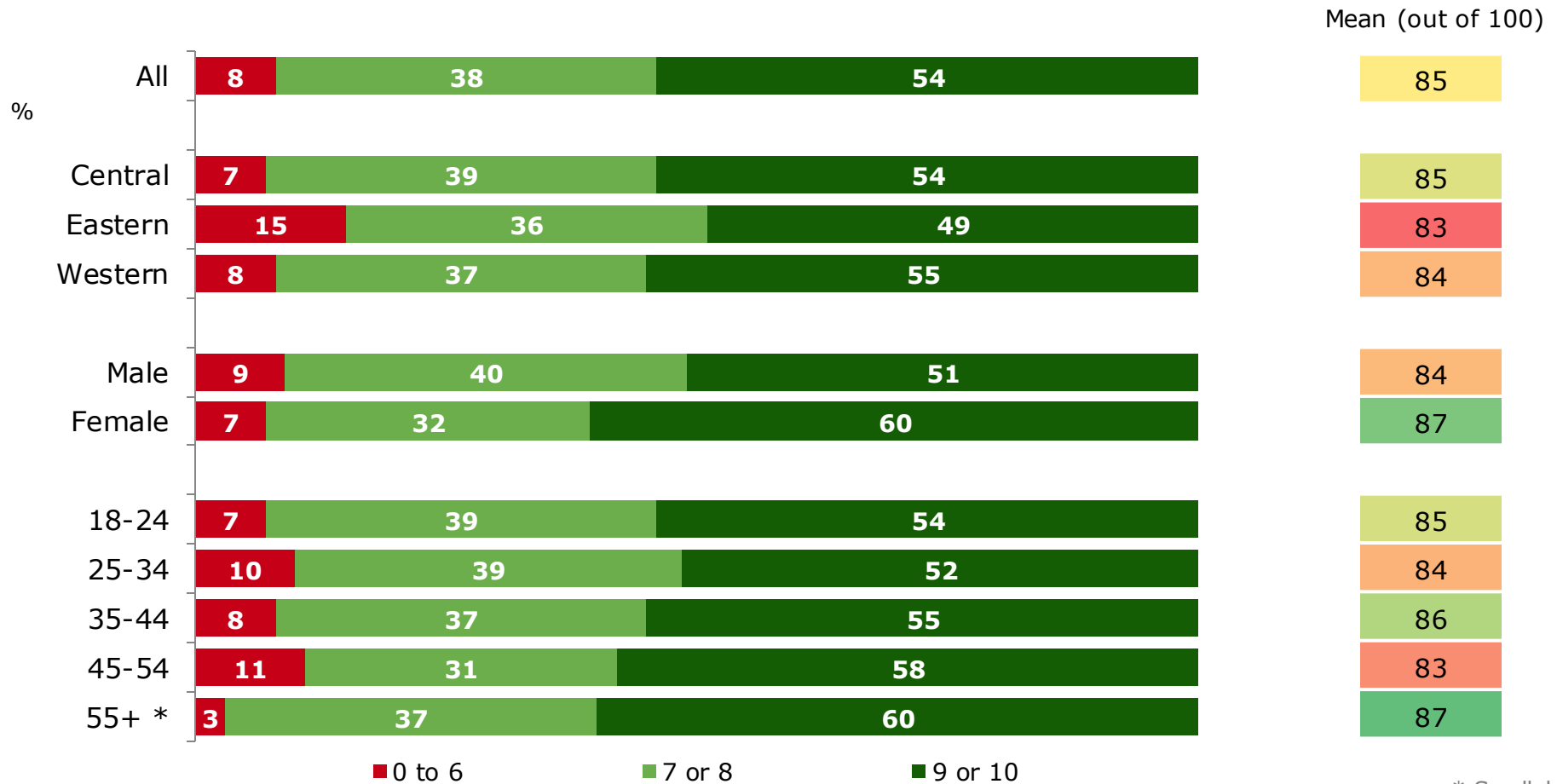
Compared to last wave, BCH casual users are more satisfied with their overall experience (85). Recommendation has also improved, achieving a new high level (91).



Q12. How satisfied are you with your overall experience of Barclays Cycle Hire today? / Q13. How likely would you be to recommend Barclays Cycle Hire to friends or family? Base: All Casual users W1: 1111; W2: 1109; W3: 1179



Satisfaction with BCH is highest in the Central and Western zones, where more than half of casual users gave a score of nine or ten. The highest proportion of dissatisfied users (scoring six or less) are in the Eastern zone.



* Small base



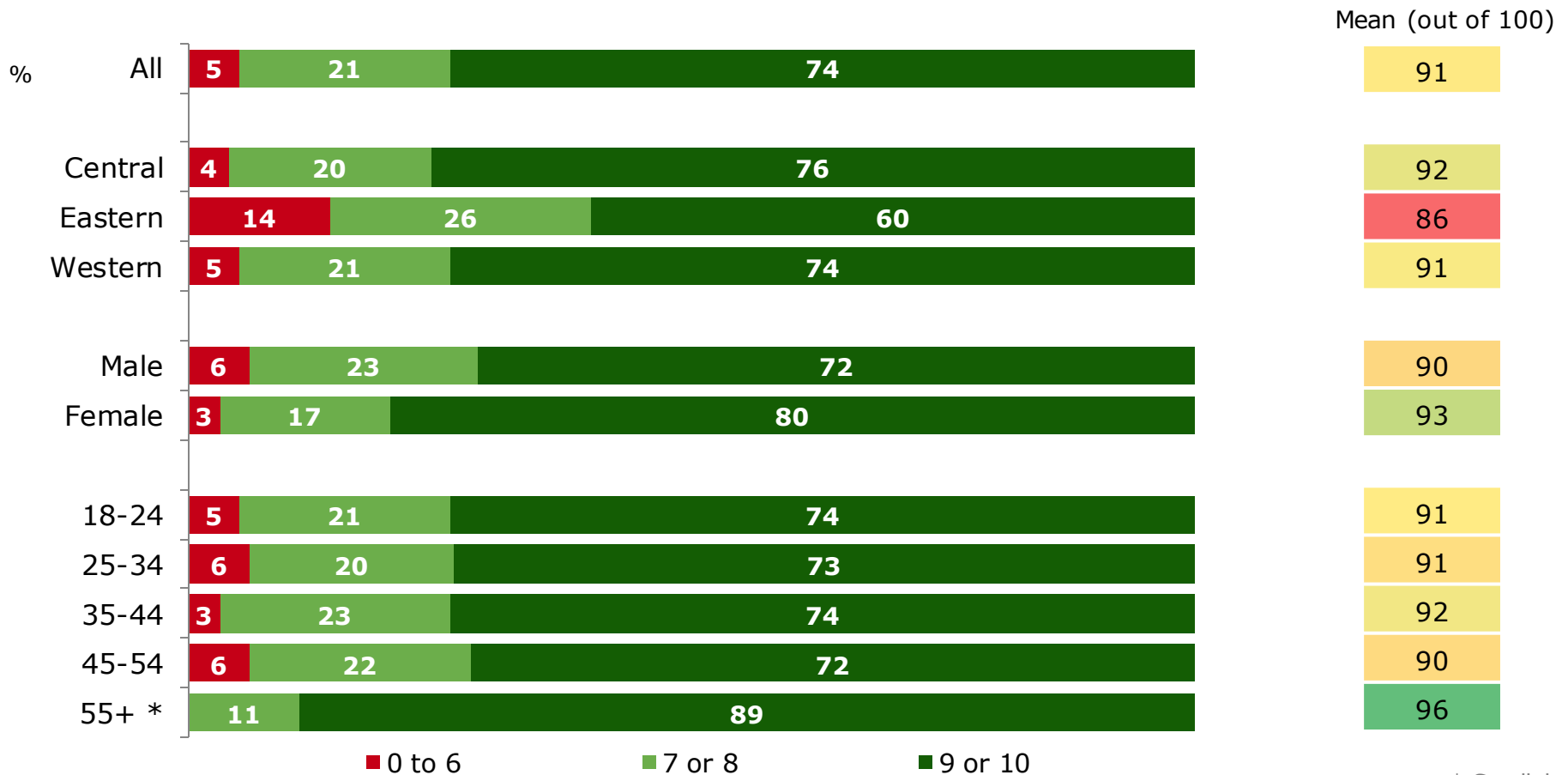
Q12. Taking everything into account, how satisfied are you with your overall experience of Barclays Cycle Hire today?

Base: Casual users W3: All:1179; Central Zone: 767; Eastern Zone: 213; Western Zone: 199; Male: 815; Female: 364; 16-24: 379; 25-34: 499; 35-44: 186; 45-54: 79; 55+: 36

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Casual users using the scheme in the Central and Western zone are more likely to recommend BCH. Females are most likely to recommend the scheme than males, but there is very little variation in recommendation by age.



* Small base

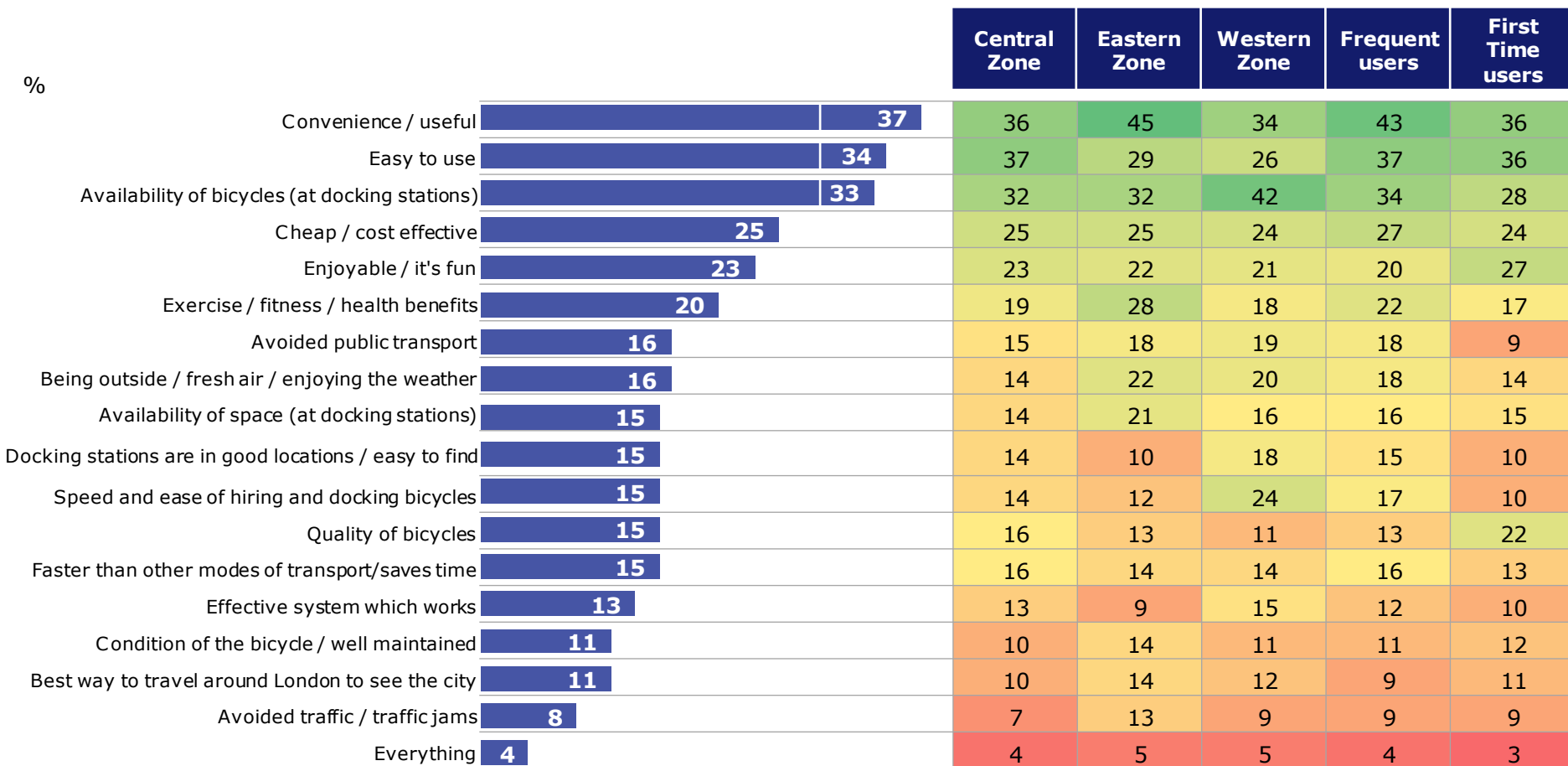
Q13. How likely would you be to recommend Barclays Cycle Hire to friends or family?

Base: Casual users W3: All:1179; Central Zone: 767; Eastern Zone: 213; Western Zone: 199; Male: 815; Female: 364; 16-24: 379; 25-34: 499; 35-44: 186; 45-54: 79; 55+: 36

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The main attraction of BCH is convenience followed by the ease of use and the availability of bikes. Frequent users are more focused on practical and health benefits than first time users.



Q14. Thinking about your experience of using Barclays Cycle Hire, what was particularly good about your experience?

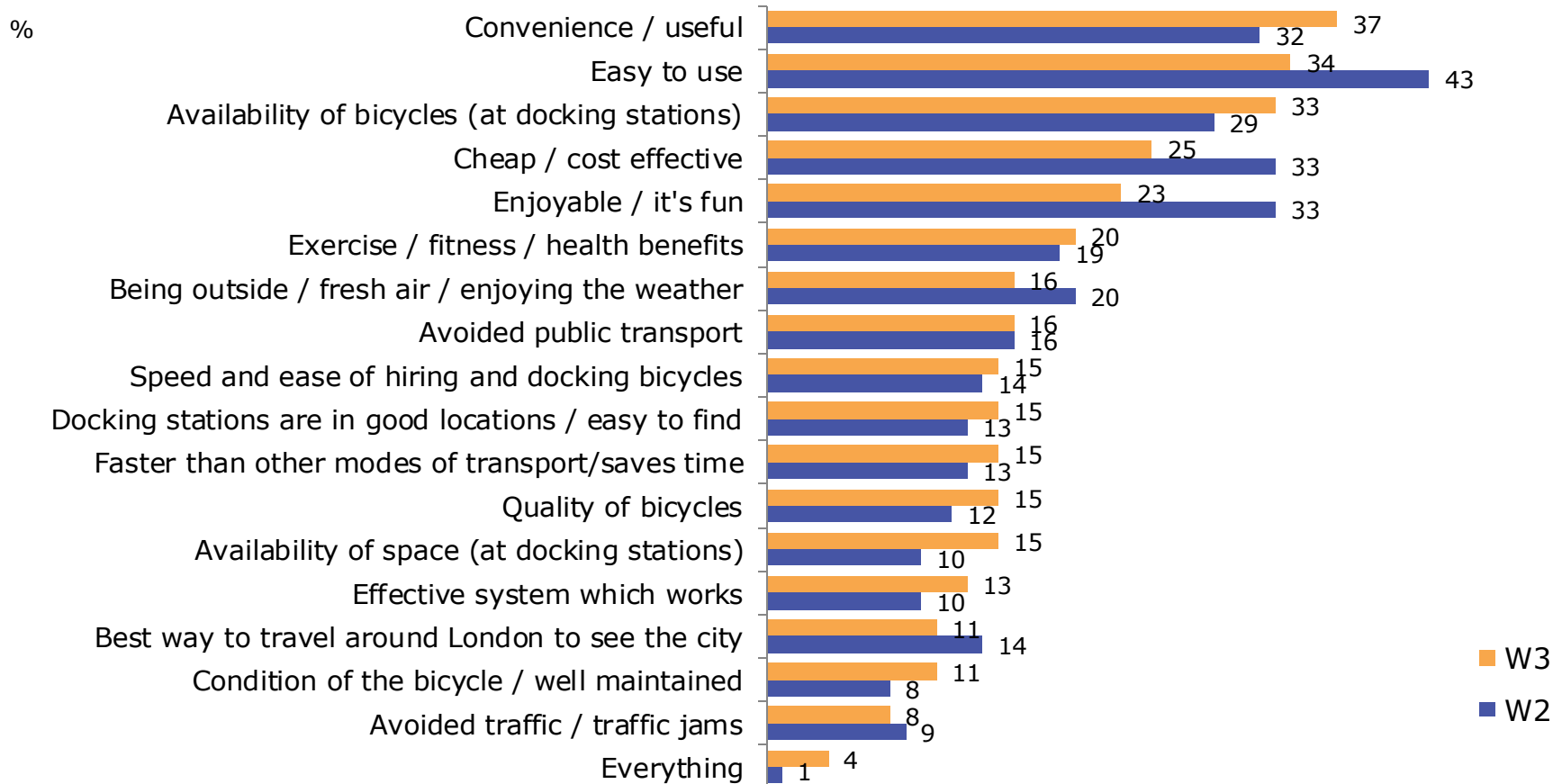
Base: Casual users W3: All 1179, Central Zone: 767; Eastern Zone: 213; Western Zone: 199; Frequent users (3-5 days a week): 358; First time users: 202

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Mentions above 4% in W3 are shown



Compared to last wave, a higher proportion of casual users gave positive feedback on convenience, availability (of bicycles and space at docking stations) and location. A lower proportion commented on cost, ease of use and the fun aspect of the scheme.



Q14. Thinking about your experience of using Barclays Cycle Hire, what was particularly good about your experience?

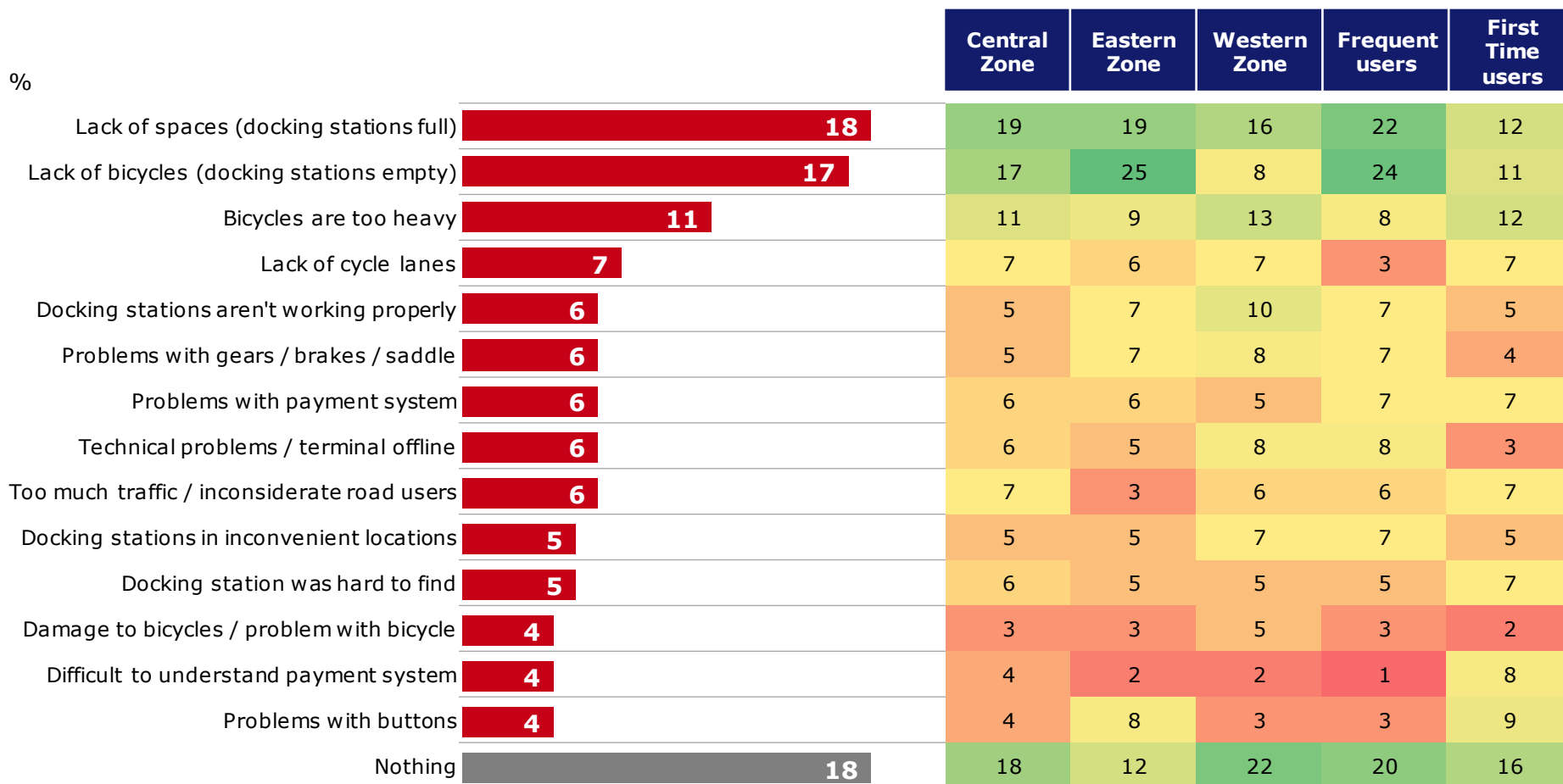
Base: All Casual users W2: 1109; W3 1179

Mentions above 4% in W3 are shown

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Users in the Eastern zone generally have more concerns (only 12% said nothing was bad). Frequent users were predominantly concerned about lack of bikes and spaces.



Q15. Thinking about your experience of using Barclays Cycle Hire, what was particularly bad about your experience?

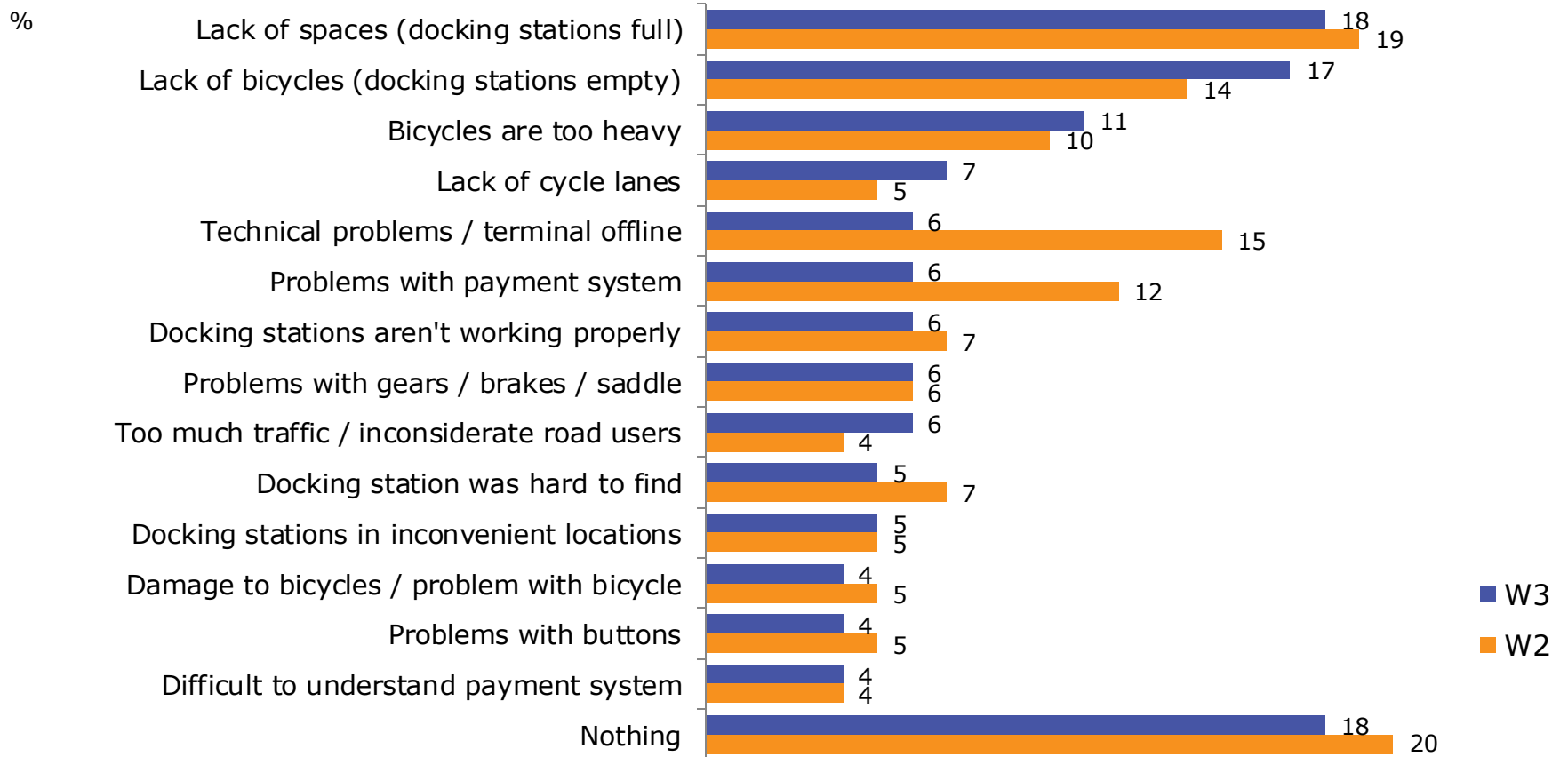
Base: Casual users W3: All 1179, Central Zone: 767; Eastern Zone: 213; Western Zone: 199; Frequent users (3-5 days a week): 358; First time users: 202

©TNS

Mentions above 4% in W3 are shown



Around one in five said there was nothing bad about the experience, in line with last year. However, far fewer mentioned technical problems with the terminals or payment issues. Slightly more mentioned bike availability, traffic and lack of cycle lanes.



Q15. Thinking about your experience of using Barclays Cycle Hire, what was particularly bad about your experience?

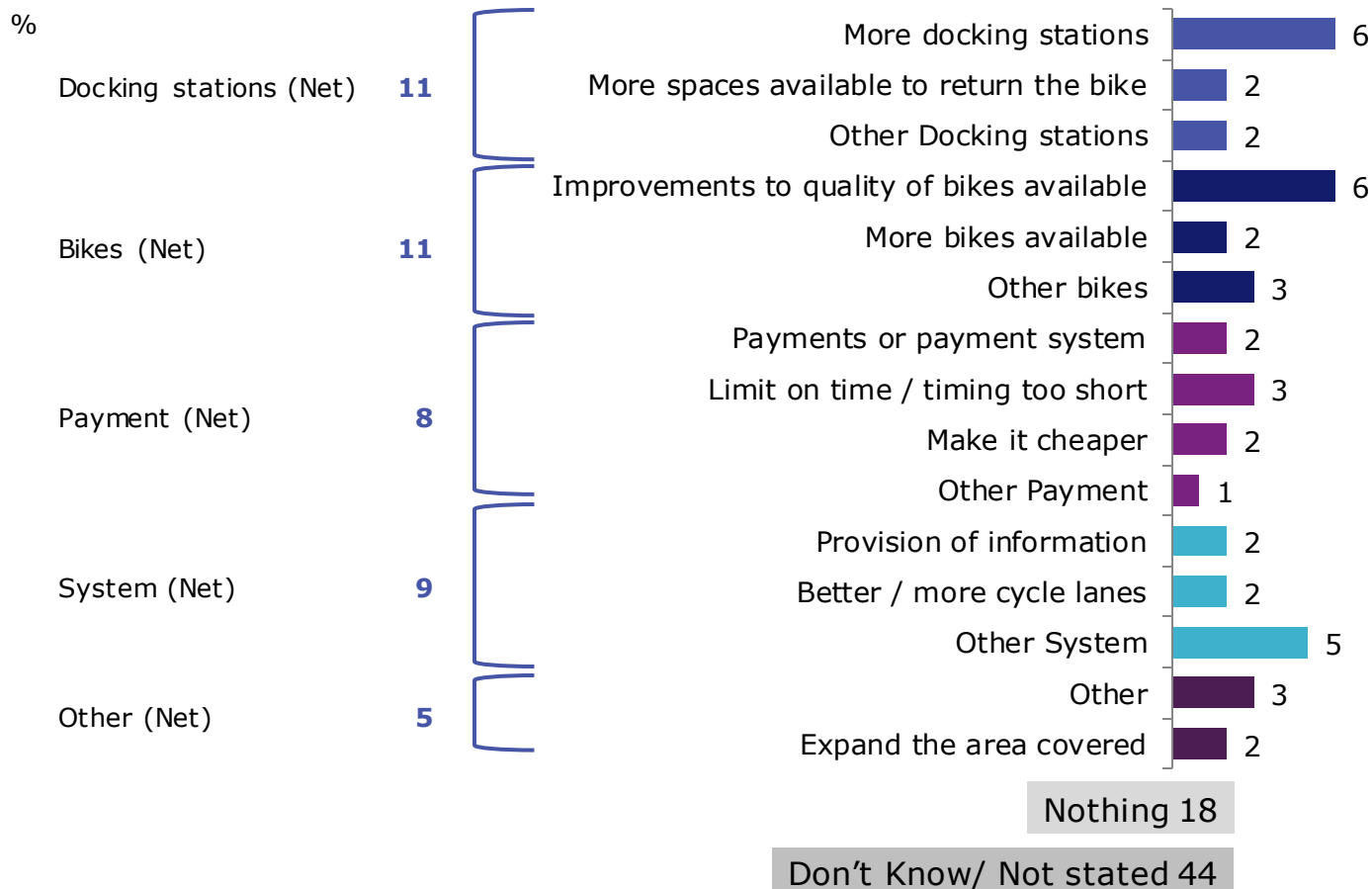
Base: All Casual users W2: 1109; W3 1179

Mentions above 4% in W3 are shown

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Docking stations and bikes are proposed as the main area of improvement by casual users. However, more than half did not make any suggestions for improvement.

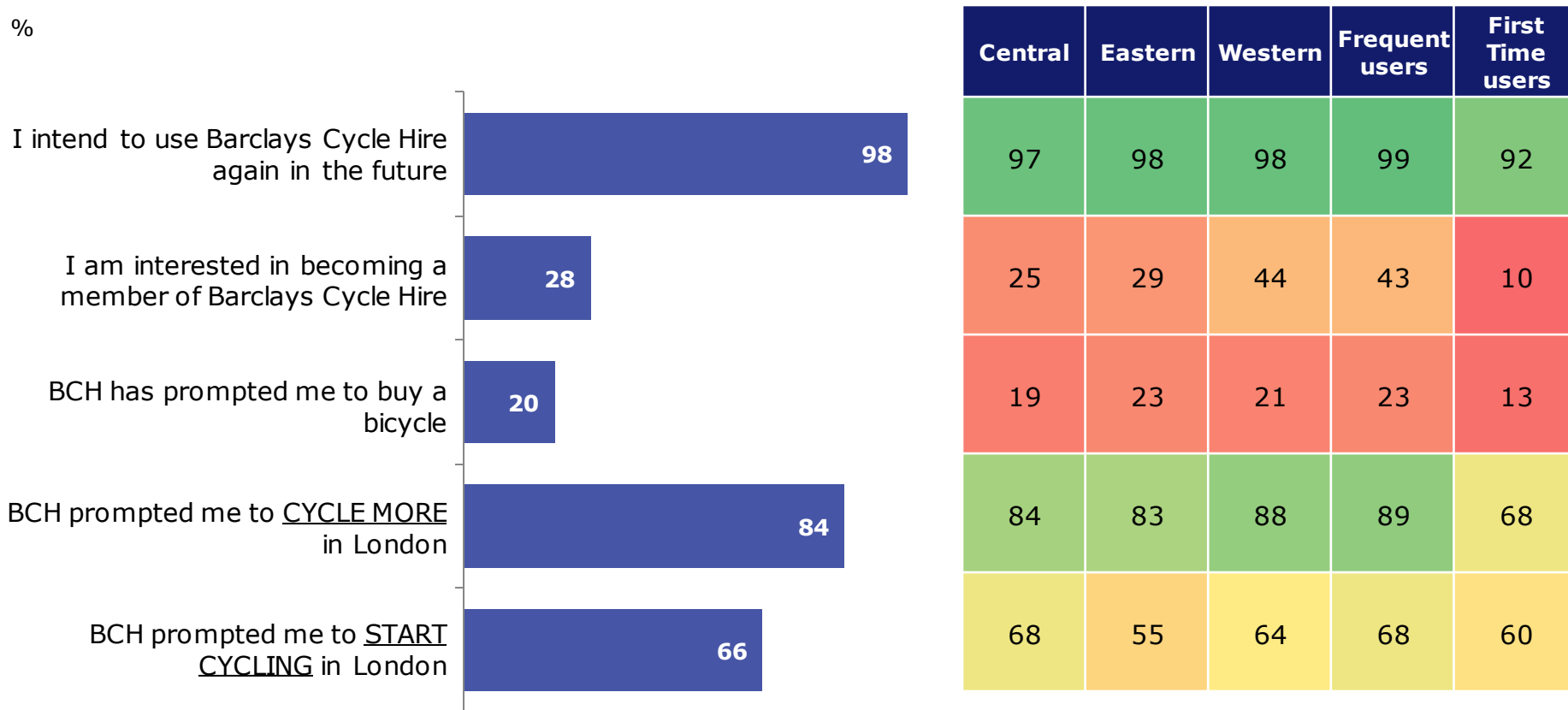


Q16.If there was one thing you would improve about the Barclays Cycle Hire scheme, what would it be?

Base: Casual users W3: All 1179



Almost all casual users intend to use BCH again. Over a quarter intend to become a member (a slight decline from last year where it was a third). Western zone users are those most interested in membership. BCH prompted two thirds to start cycling and 84% to cycle more. First time users are less encouraged to cycle more.



Q19. Which, if any, have you done as a result of the introduction of the Barclays Cycle scheme?

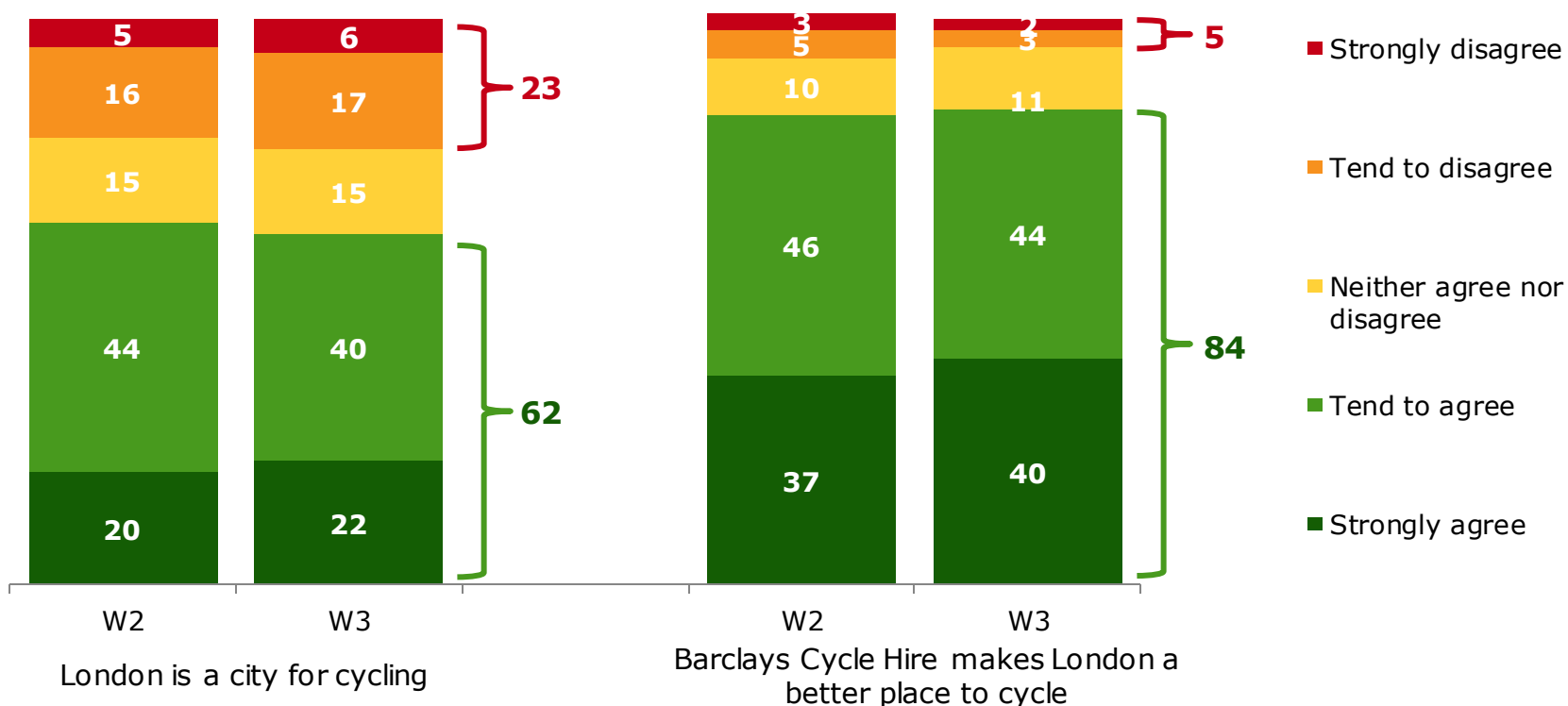
Base: Casual users W3: All 1179, Central Zone: 767; Eastern Zone: 213; Western Zone: 199; Frequent users (3-5 days a week): 358; First time users: 202

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Almost two thirds perceive London as a city for cycling and over 80% agree that BCH makes London a better place for cycling. This is similar to last year.

%

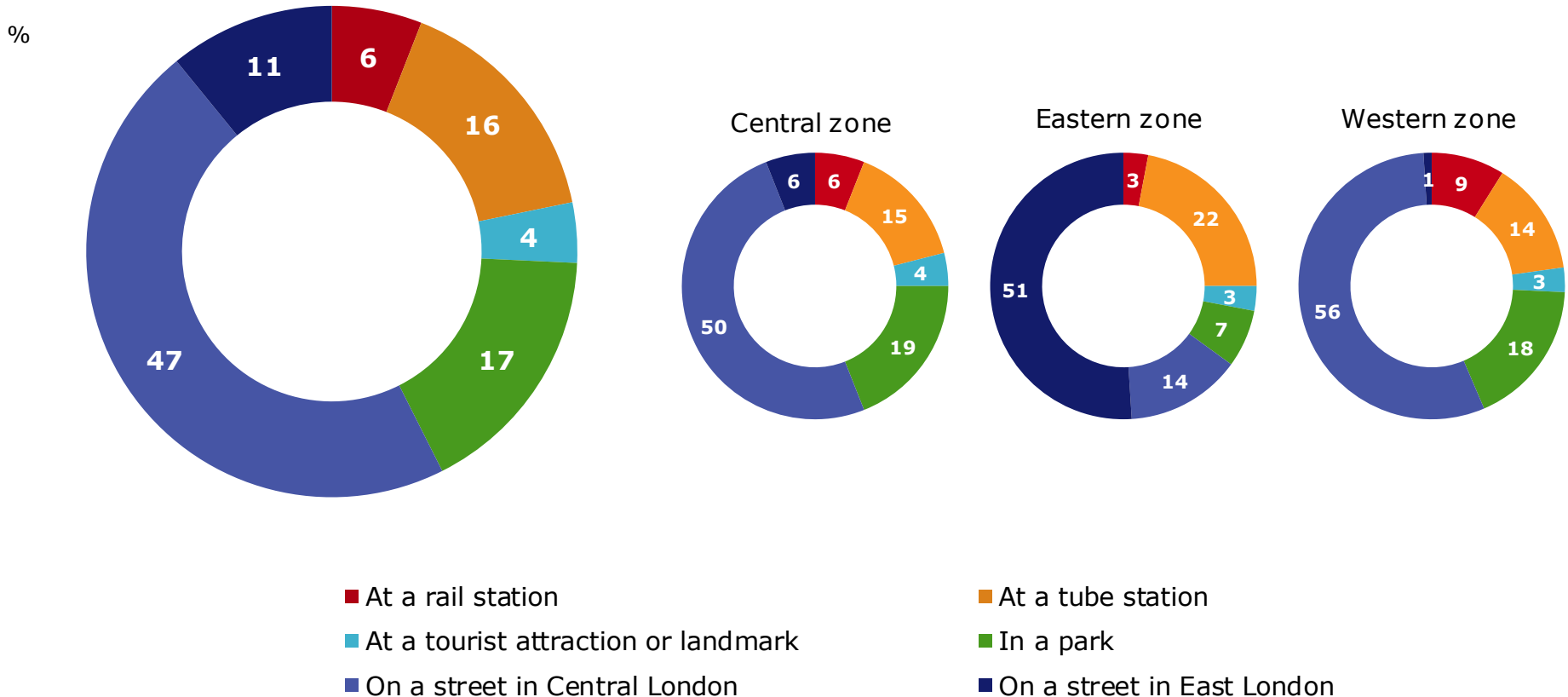


Q20.To what extent do you agree with the following statements?

Base: Casual users W3: All 1179



Casual users are more likely to use docking stations located on a Central London street (47%). Parks are mentioned more in the Central and Western zones and tube stations are mentioned more in the Eastern zone.



Q3c. Thinking of the docking station you used to hire the bike for your most recent trip, was it located ...?

Base: Casual users W3: All 1179, Central Zone: 767; Eastern Zone: 213; Western Zone: 199