

Nursery Group Cycle Hire analysis

Profile, motivations and barriers, impact

Peter Lee/Amy Jones
February 2015



Background

The Cycle Hire Team is keen to understand the 'nursery group' (i.e. new users of CH – Casuals or Members)

- **'Nursery group'** * - understanding the nursery group and their behaviour/attitudes towards the scheme so far:
 - what are the behaviours exhibited?
 - what experiences do they have in the early days?
 - what impacts their use of the scheme once they have taken their first trip?
- The **Potential Audiences** will be:
 - CH users* (recently registered in 2015)
 - CH users** in first x number of trips (just starting out) – not covered in this report
 - **Lapsed users (also not covered in this report)**
 - This report took CSS survey data for Q3 2015/16 for 'newly registered' CH Members in 2015 and compares with those registered prior to 2015.

This document aims to summarise the key insights from this area and will help us answer :

- Why did they start using the scheme? i.e. motivations (convenience/fitness/speed etc)
- What characteristics do they display as users? (what journeys do they make, hires in certain locations, times of day etc)
- What is their feedback on their first/ first few trips?
 - How did they hire (member, casual, app)
 - What worked well? What could be improved?
 - What sources of info did they use (web, CC, friends, just figured it out)
- Current likelihood to recommend? What could we do to improve likelihood of recommending?
- How could we help you use it more?
- Why would you/ why have you stopped using the scheme?
- What aspects of the scheme do you most value? (financial – trips taken versus charge, or option always there to use, convenience, can walk up and use etc)

*The Nursery Group is defined as those who registered as a CH Member in 2015 for this report

**Data not analysed by trip frequency in this report – while CH Member CSS asks trip frequencies, base sizes would be too small for analysis purposes amongst the less frequent user base/registered in 2015

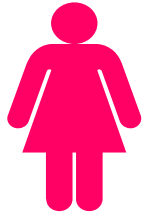
Nursery Group Key Insights

- The main deterrents to taking up cycling or cycling more are primarily linked to **safety concerns** (i.e. fear of being involved in a collision, too much traffic), plus fear of having one's bike stolen, lack of time and lack of confidence
- **Reliability** is at the core of delivering a good customer experience to both Casual users and Members of Santander Cycle Hire
- We must first deliver on the **hygiene factors** for CH i.e. CH payments, docking station availability, bike parking/release & route information)
 - Members who joined in 2015 are less likely to be aware of the additional 15 minutes available (if a dock is full)
- New members are increasingly likely to **use CH for leisure purposes** than longer term members, but overall, commuting is top - ease of use and convenience are the key attractions
- Newer members are more likely than longer term members to **use an App to check for the availability of bicycles and docking stations**
- **Word of mouth/recommendation is increasing** as a source of information about Cycle Hire – almost a third of the 'nursery group' got information from friends/family
- Crucially, **the impact of CH on cycling behaviour is positive**, with 4 in 5 members cycling more in London.

Who are our customers and propensity to use



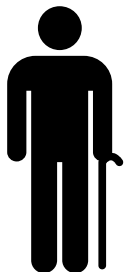
Cyclists	Regular	Occasional	Non-cyclists	Casual users	Members
17%	12%	4%	84%	18%*	4%*



13%	10%	3%	87%	29%	21%
-----	-----	----	-----	-----	-----



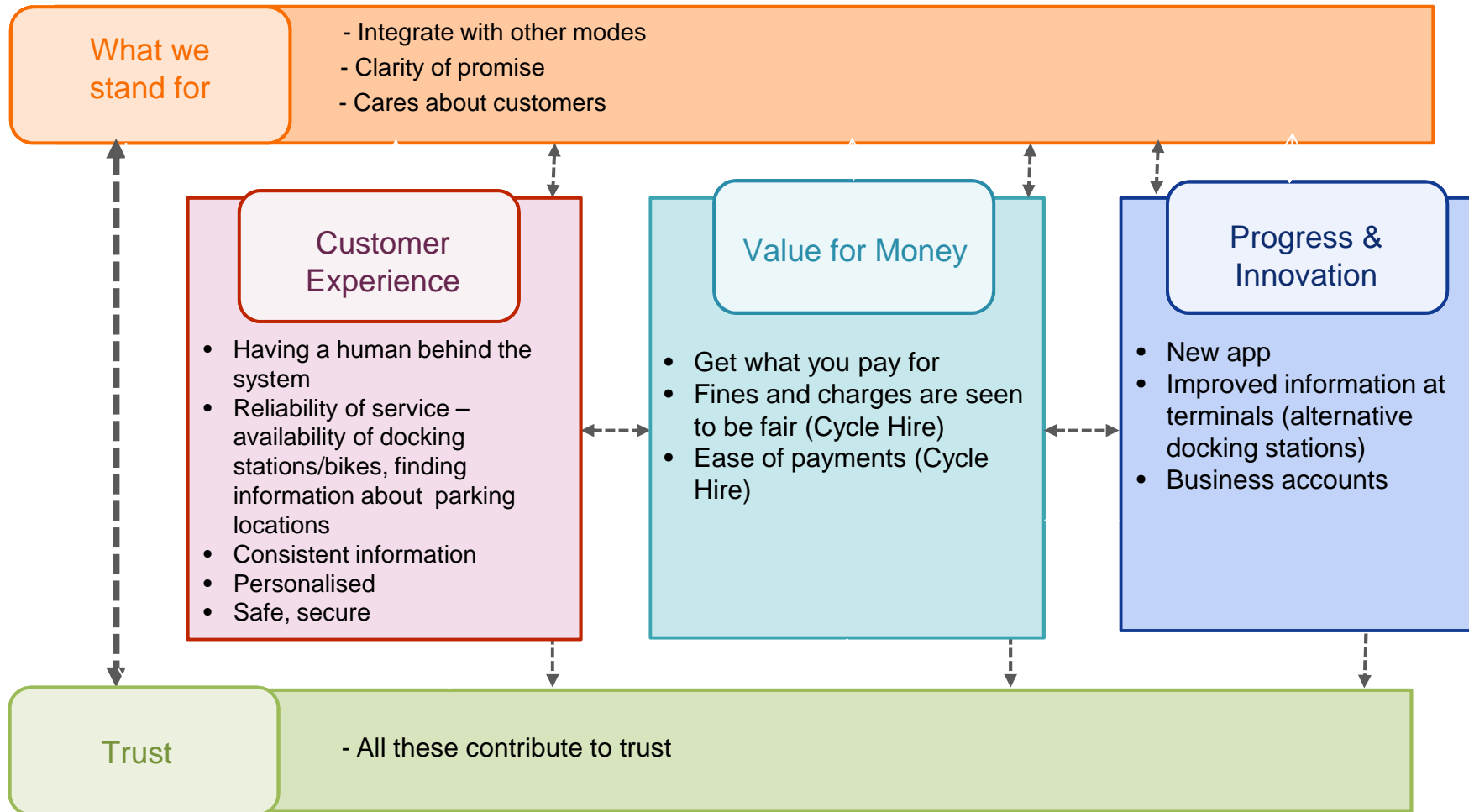
19%	15%	4%	81%	66%	82%
-----	-----	----	-----	-----	-----



9%	5%	4%	91%	3%	14%
----	----	----	-----	----	-----

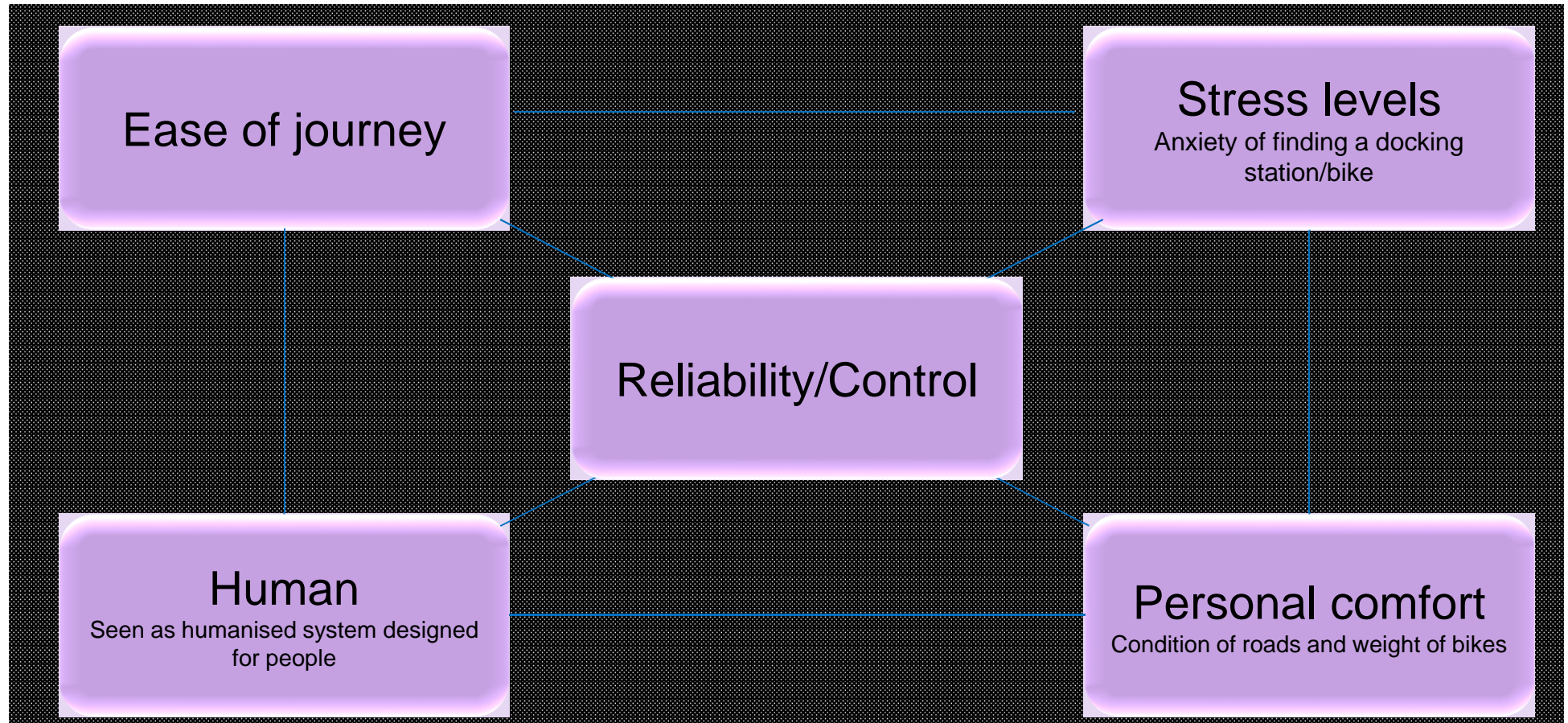
*Source: Attitudes towards Cycling, Future Thinking, September 2015

What our cycling customers want



How our customers think about their journeys

There are five core experience principles that make up the holistic experience



Slide 6

k4

did you ask Rob for his slide to add?

katebarber, 02/02/2016

Pain arises when standards are not met

Address hygiene factors and CSF's first

Red = Cycle Hire factors

Delighters

Critical
Success
Factors

Hygiene
Factors

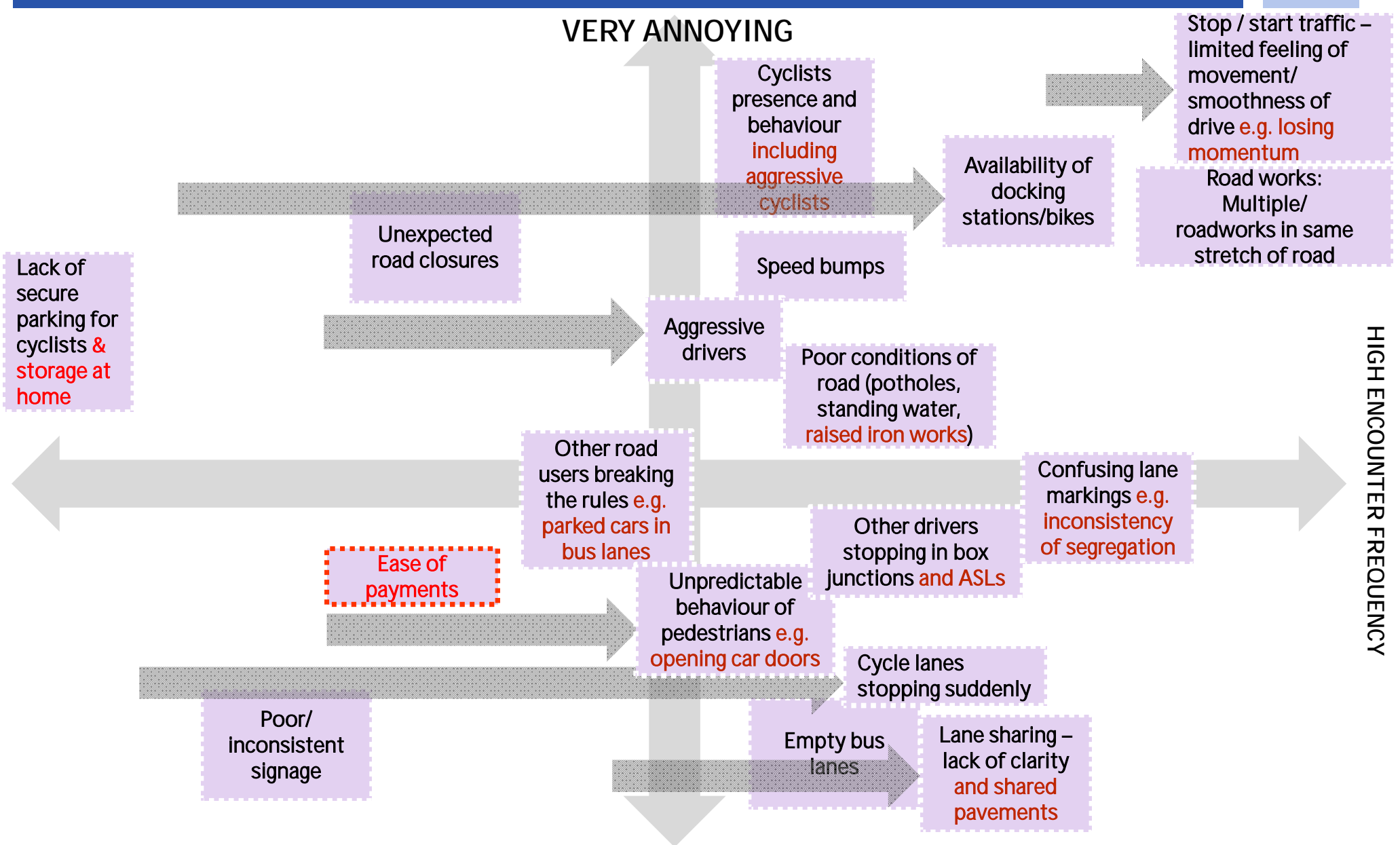
- Segregated cycle lanes
- Culture of sharing the road
- Perfect air quality & life enhancing urban realm
- Secure cycling parking

- Smooth journey
- Urban realm improvements
- Directional information & nicer route info
- Roadworks have evidence of progress / activity
- Information about roadworks' duration & purpose always given

- Road safety
- Ease of CH payment
- Smoothness of pavement, condition of road surface
- Security along with cleanliness, lighting & state of repair
- Road crossing, drop curb, at grade crossing where needed, no obstructions
- CH bike/docking station availability, Availability of cycle parking,
- Release of CH bikes
- Route information (e.g. street names, road signs)

Cycling/Cycle Hire Customer Gain Points

some aspects move to the right for Cycling as they occur more often



Our Customer Strategy

Our strategy is:

We will make customers feel that Every Journey Matters by dramatically improving the consistency of the customer experience

Our 6 strategic priorities are:

1. Remove customers' day to day frustrations, turning everyday pain into gain for them, and for us
2. Support customers better when things go wrong
3. Explain our purpose and priorities so more customers understand what we do, how we reinvest their fares, and the improvements we are making
4. Be open and transparent in everything we do, be honest about our mistakes, and build trust through our words and actions
5. Get better and better by working together
6. Connect our people to our purpose, and allow staff to make decisions at a local level to deliver even better customer service

Nursery Group Summary (1)

- Cyclist gain points are also largely CH gain points (i.e. Traffic congestion, other aggressive cyclists & road users, road works/condition of roads) and so addressing these will also improve the CH experience and encourage usage – as safety is perceived as the key barrier (i.e. fear of collision & too much traffic)
- **Reliability** is at the core of delivering a good customer experience to both Casual users and Members of Santander Cycle Hire
 - Central to this is delivering consistent, accurate information on the availability of docking stations and bikes
 - The Santander App (now doing this) is widely used and contributing to an improved CH customer experience
- We must first deliver on the **hygiene factors** for CH i.e. CH payments, docking station availability, bike parking/release & route information)
- New CH members (i.e. those who registered in 2015) have a greater representation of younger (aged 16-34), middle income (£15k-£75k), BAME, and females than longer standing members. This suggests that a more representative cohort of London are becoming interested in the CH scheme. **The 'nursery group' is evermore diverse**
 - We know that typically cyclists tend to be white males, aged 35-44, so this indicates that Cycle Hire is reaching out to a wider audience of people who might not otherwise cycle
- New members are increasingly likely to **use CH for leisure purposes** than longer term members, but overall, commuting is top - ease of use and convenience are the key attractions.

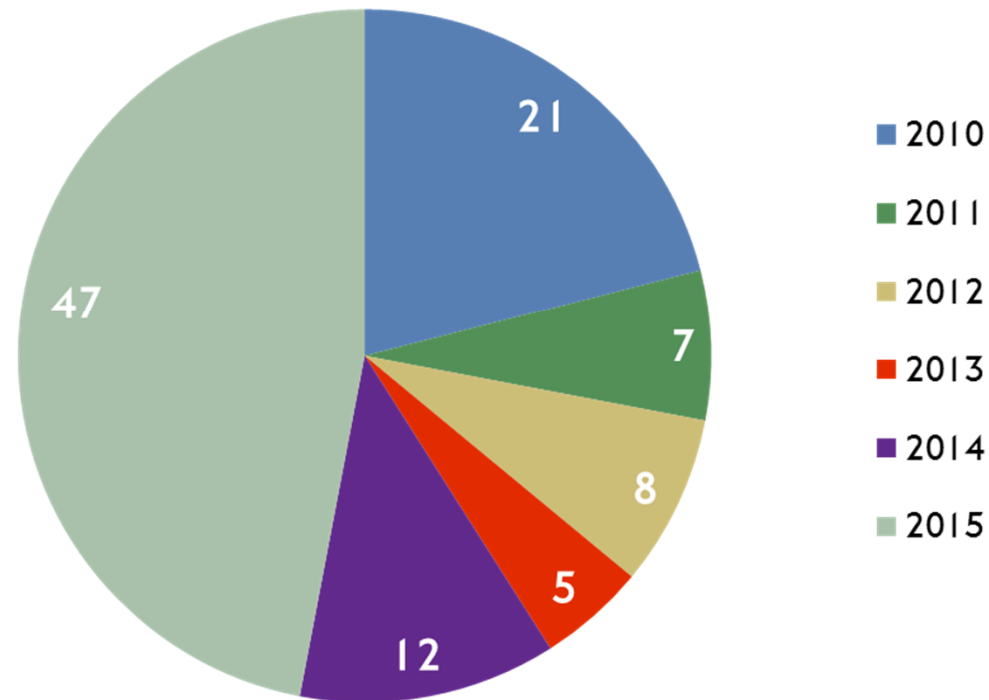
Nursery Group Summary (2)

- Newer members are more likely than longer term members to **use an App to check for the availability of bicycles and docking stations** – they are also more satisfied with the availability of docking stations. Encouraging new members to use these tools could make their experience more pleasurable/convenient
- Awareness of the **15 minute grace period at busy docks is lowest among new members**. It may be that understanding of this benefit comes about when users actually experience an issue with docking their bike
 - As a large proportion of members either aren't aware, or don't know how to use this function, it may be beneficial to communicate this more widely (especially among the 'nursery group'), as 'wanting more docking stations' is currently the biggest barrier to higher use, perhaps due to a fear of the penalty charges if a docking station is full
- **Word of mouth/recommendation is increasing** as a source of information about Cycle Hire – almost a third of the 'nursery group' got information from friends/family
 - A way of promoting WOM (refer a friend schemes?) could be effective
- Crucially, **the impact of CH on cycling behaviour is positive**, with 4 in 5 members cycling more in London.

Profile of Cycle Hire members

Almost half of those interviewed were registered in 2015 and so would classify as the 'nursery group' (for this report)

Member base - year of registration



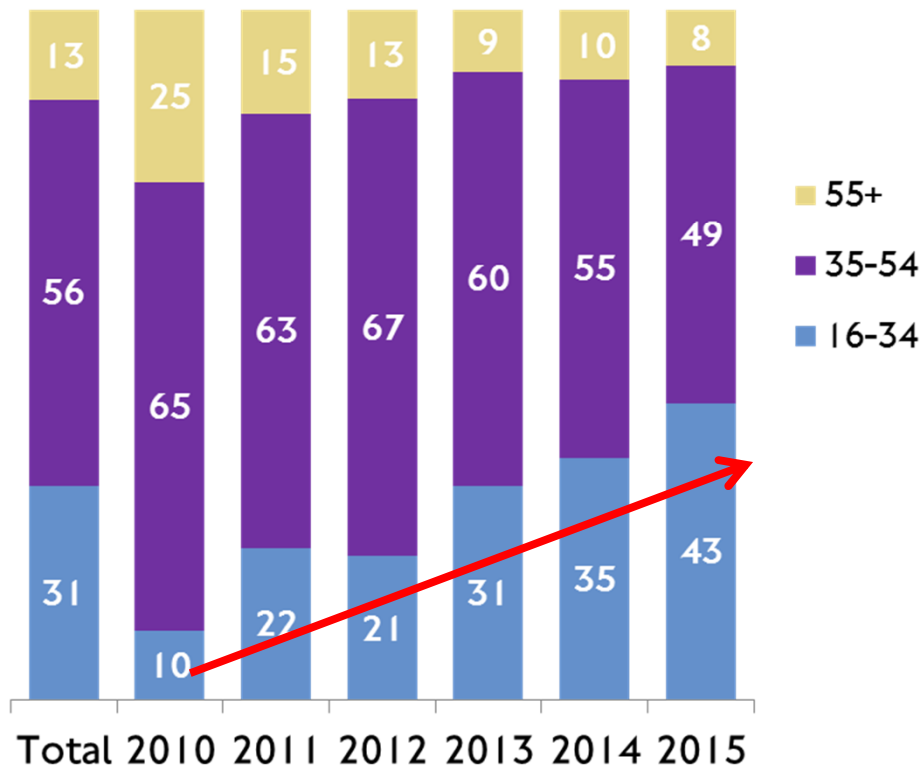
'Nursery group' is defined as those who registered as a CH Member in 2015

Source: Santander Cycles Members CSS, TNS, Q3-2015/16

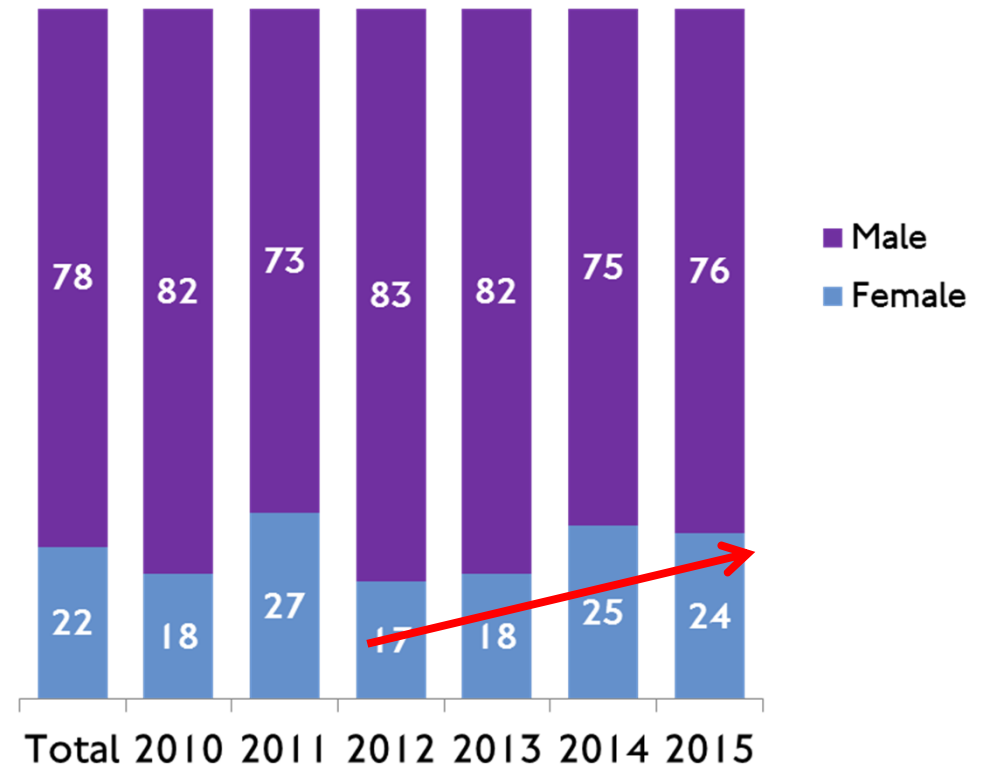
Q. Registration year **Base:** 2455

New members are increasing in the younger age brackets (16-34) and are more likely to be female than longer term members

Age



Gender

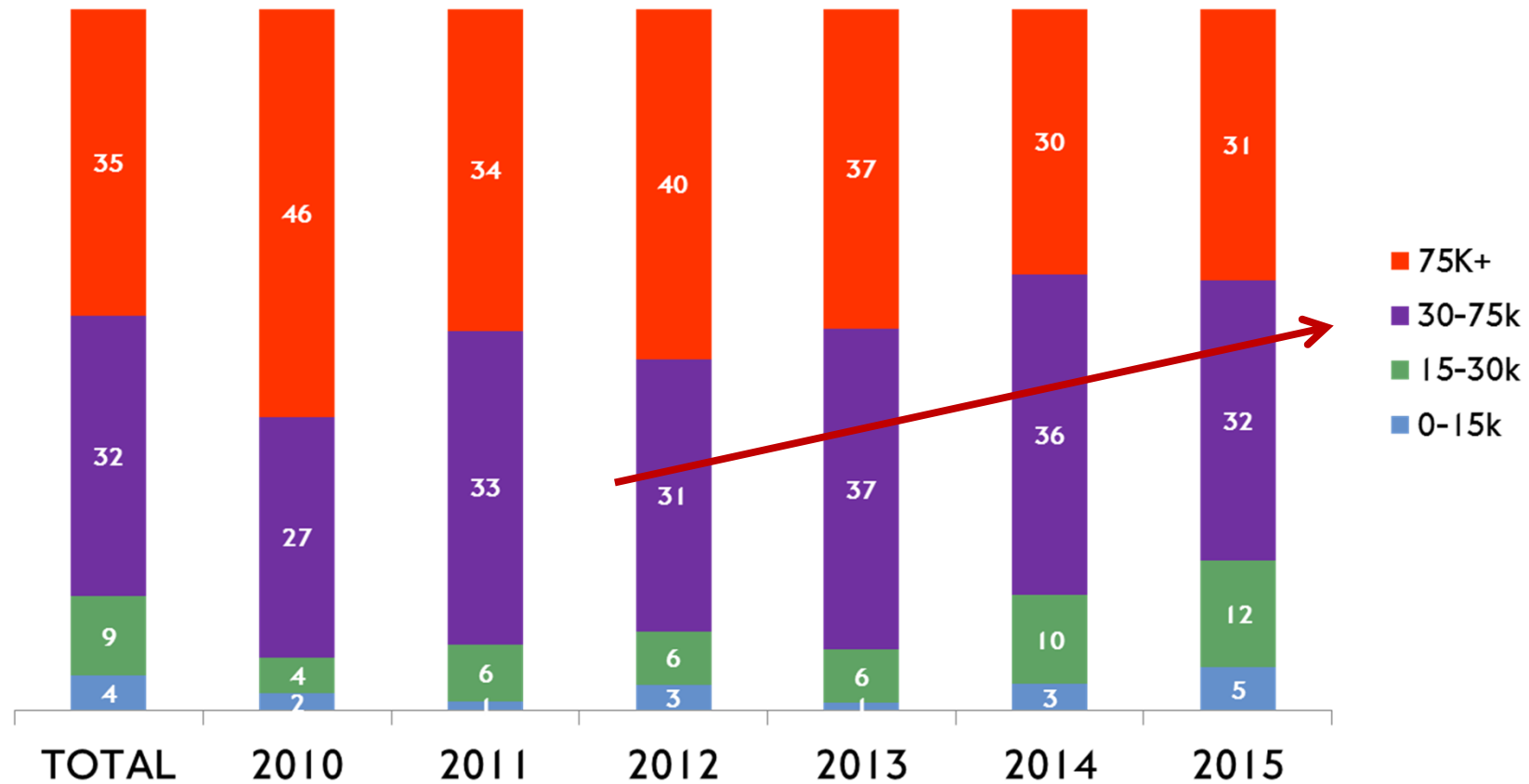


'Nursery group' is defined as those who registered as a CH Member in 2015
 Source: Santander Cycles Members CSS, TNS, Q3-2015/16

Q. Age/Gender Base: 2455

The new members have increasingly lower incomes than longer term members (i.e. who joined in 2010/11)

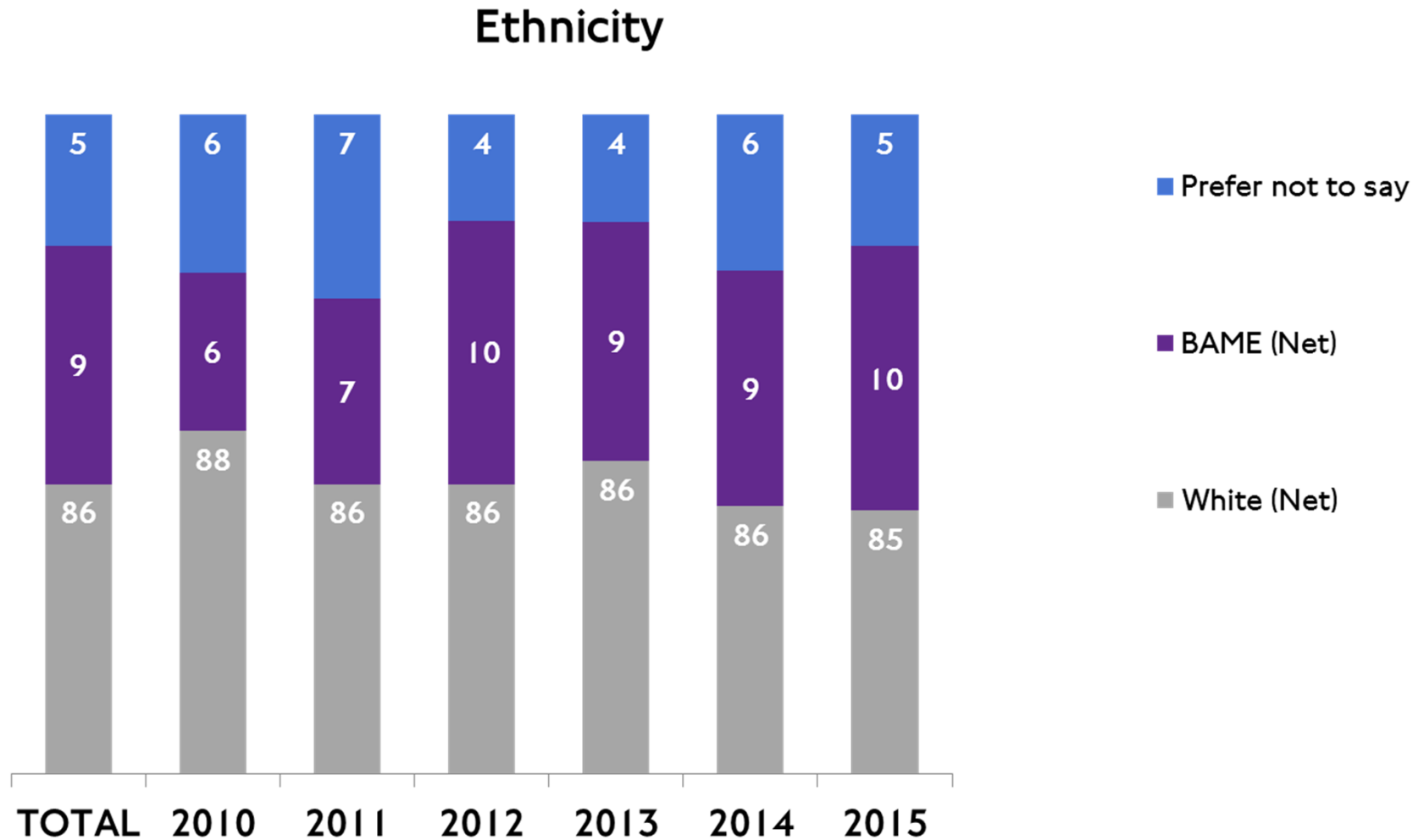
Household income



'Nursery group' is defined as those who registered as a CH Member in 2015

Source: Santander Cycles Members CSS, TNS, Q3-2015/16

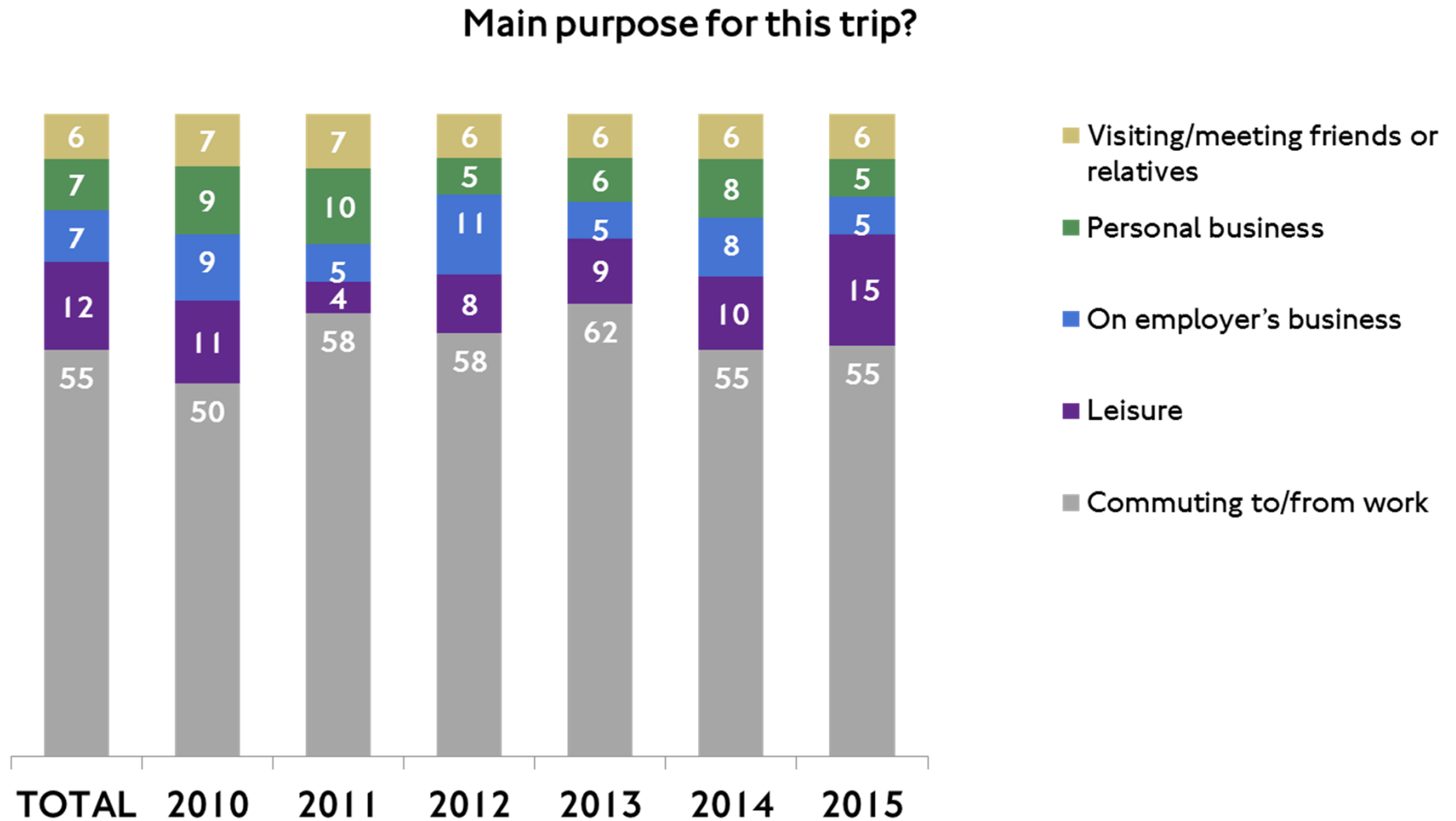
The profile of members is fairly consistent



'Nursery group' is defined as those who registered as a CH Member in 2015
 Source: Santander Cycles Members CSS, TNS, Q3-2015/16

QK3. Ethnicity Base: 2455

New members are increasingly likely to use Cycle Hire for leisure purposes than longer term members, but overall commuting is top



'Nursery group' is defined as those who registered as a CH Member in 2015

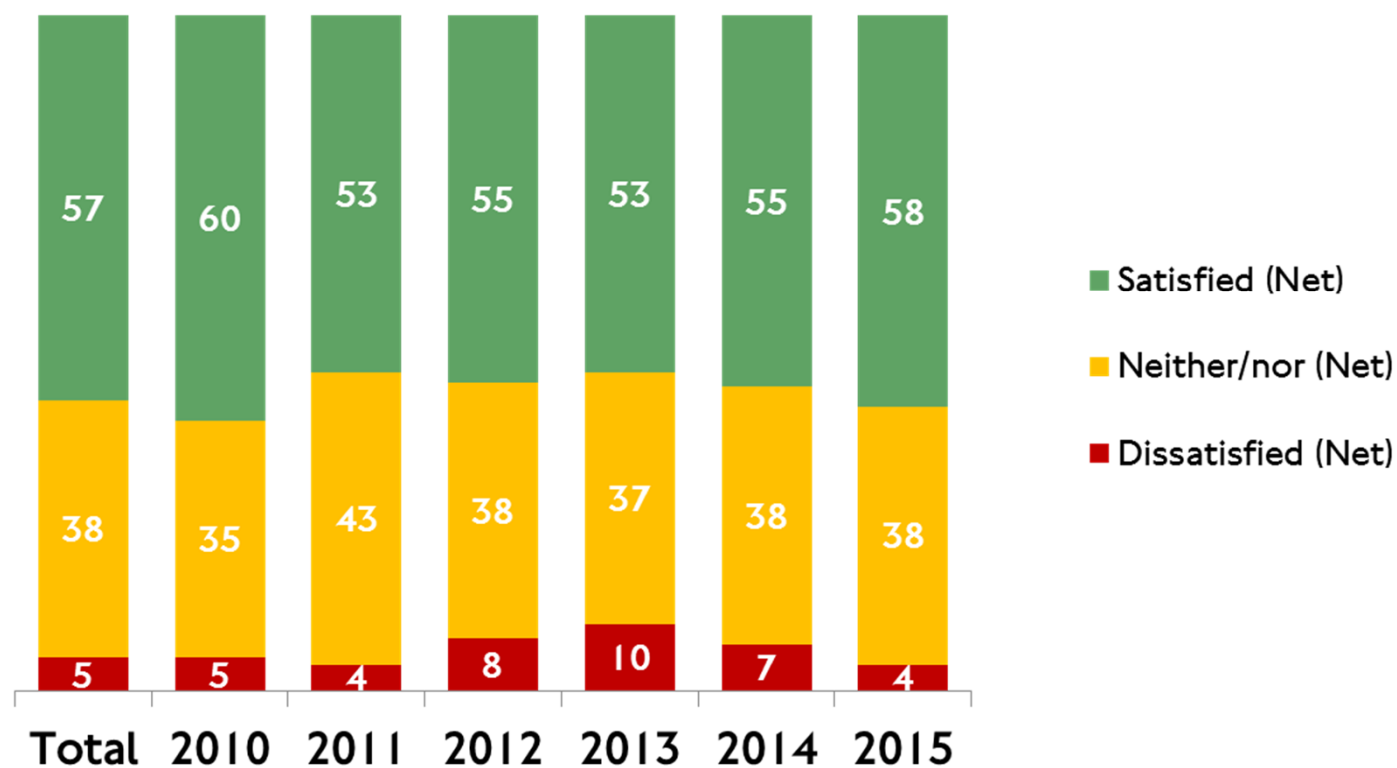
Source: Santander Cycles Members CSS, TNS, Q3-2015/16

QJ7a. What was the main purpose of your journey for this particular trip? **Base:** 2455

Satisfaction

Overall satisfaction with Cycle Hire is consistent across groups

Satisfaction with overall experience with Cycle Hire

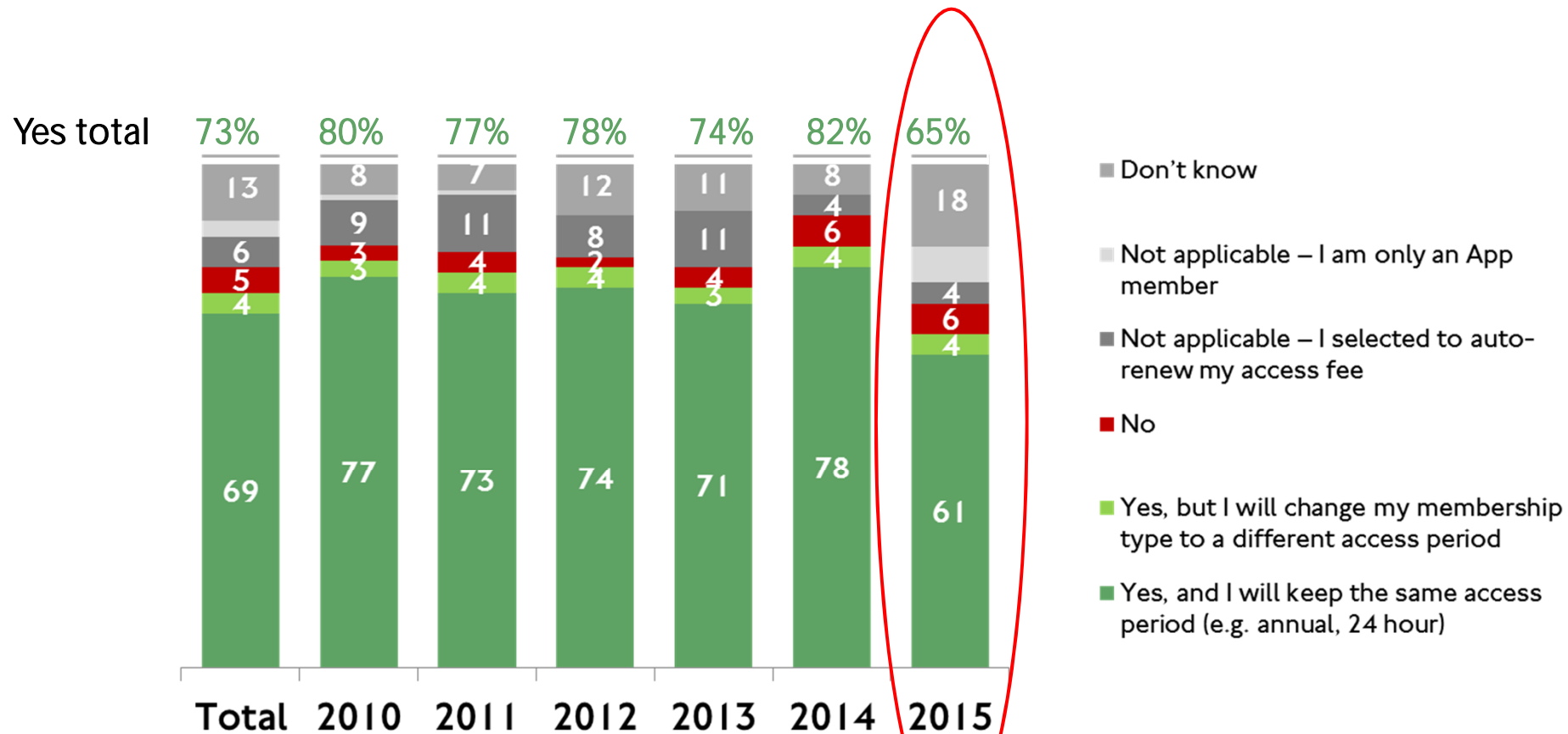


'Nursery group' is defined as those who registered as a CH Member in 2015
 Source: Santander Cycles Members CSS, TNS, Q3-2015/16

QA1. Overall satisfaction Base: 2455

New (2015) members are less certain as to whether or not they intend to renew their membership than longer term members

Are you intending to renew your membership when it runs out?



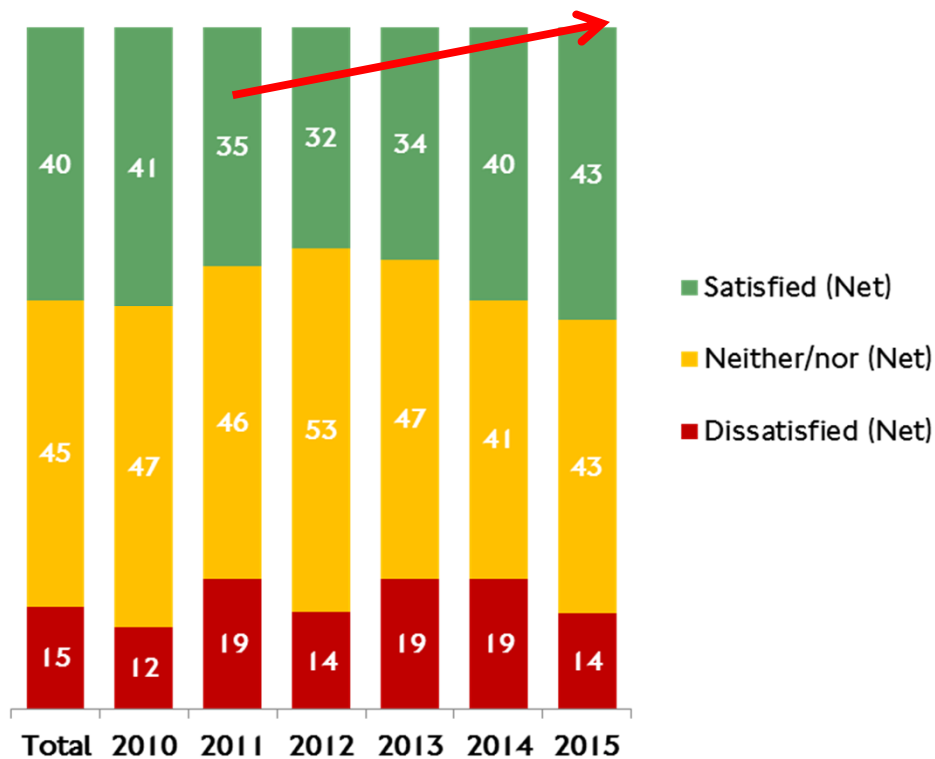
'Nursery group' is defined as those who registered as a CH Member in 2015

Source: Santander Cycles Members CSS, TNS, Q3-2015/16

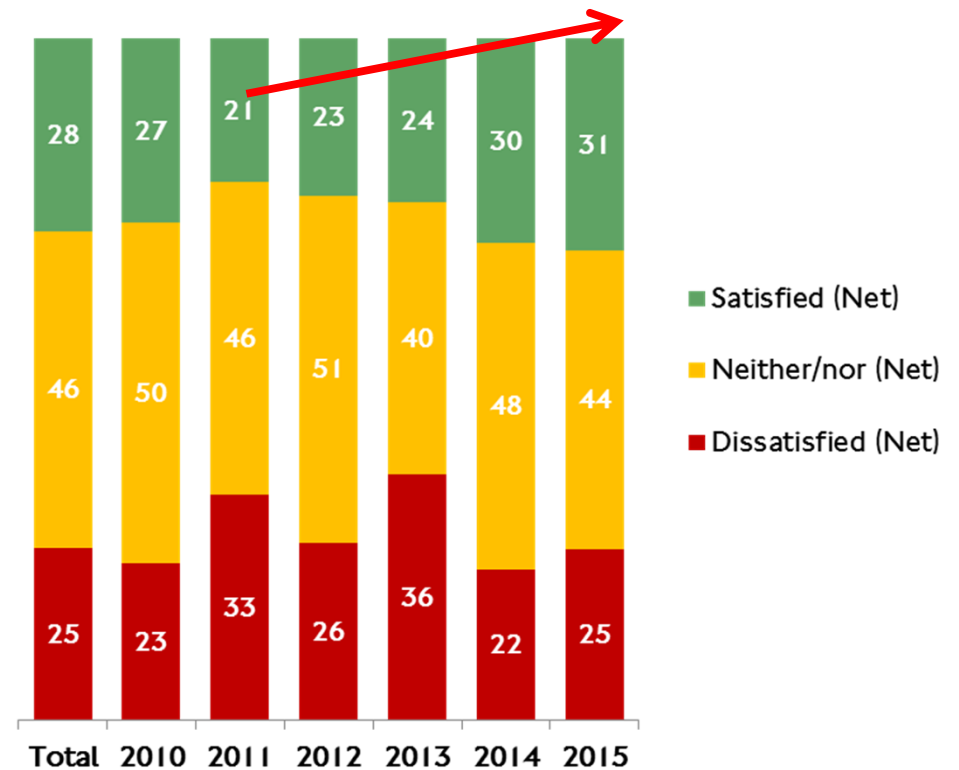
QC1. Are you intending to renew your membership when it runs out? Base: 2455

Satisfaction with both the availability of bikes and docking stations has increased amongst newer members

Satisfaction with availability of bicycles



Satisfaction with availability of docking points



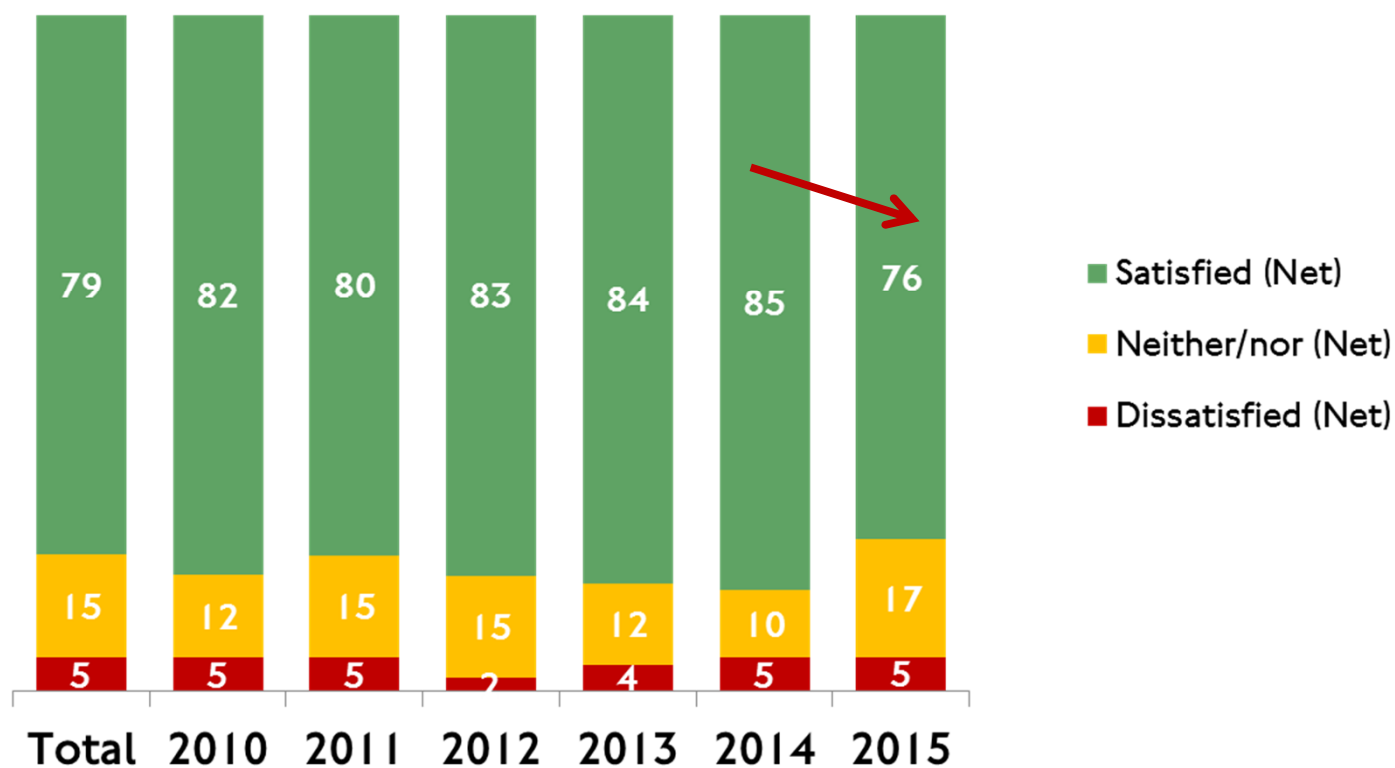
'Nursery group' is defined as those who registered as a CH Member in 2015

Source: Santander Cycles Members CSS, TNS, Q3-2015/16

QD1a/QD1b. How satisfied are you with the availability of bicycles at docking stations/ free docking points to return bicycles at docking stations **Base:** 2455

2015 members are slightly less satisfied with the membership key

Satisfaction with ease of using membership key



'Nursery group' is defined as those who registered as a CH Member in 2015

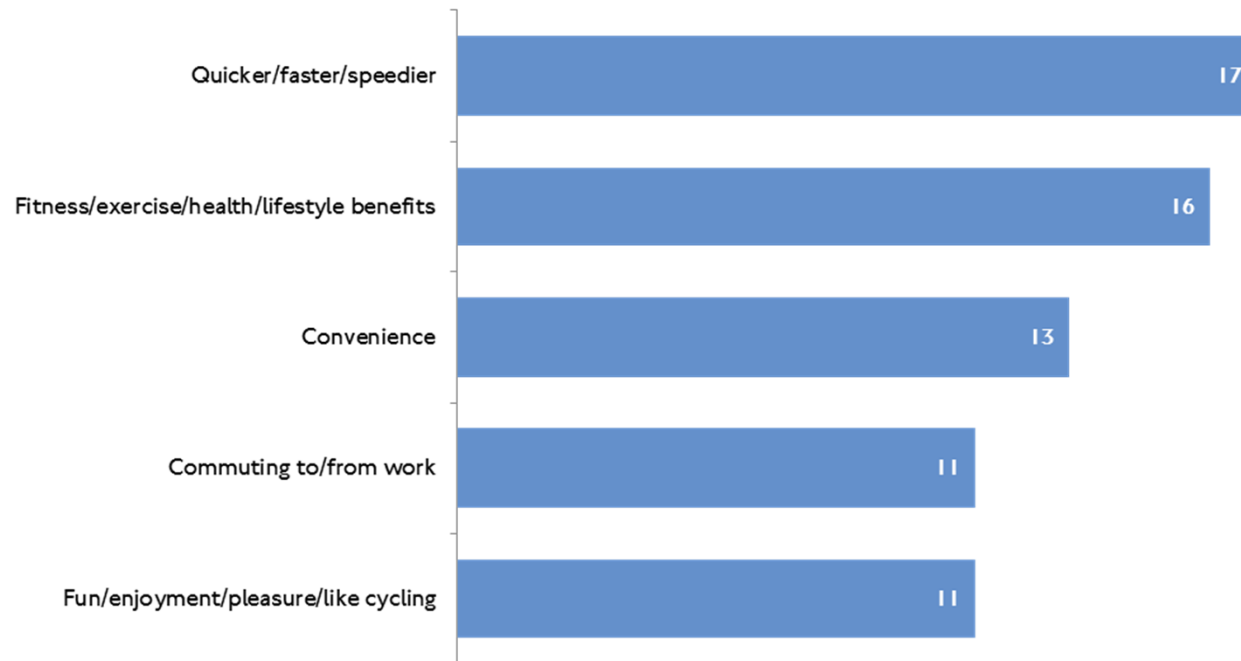
Source: Santander Cycles Members CSS, TNS, Q3-2015/16

QD3. How satisfied are you with the ease of using the membership key to access a bicycle? **Base:** 2362 (all members with membership key)

Attitudes and behaviours

New members were first motivated to start using Cycle hire because it is quicker than other modes and for fitness reasons

Why did you first start using Cycle hire?
Members who've joined in the last 12 months only – top 5

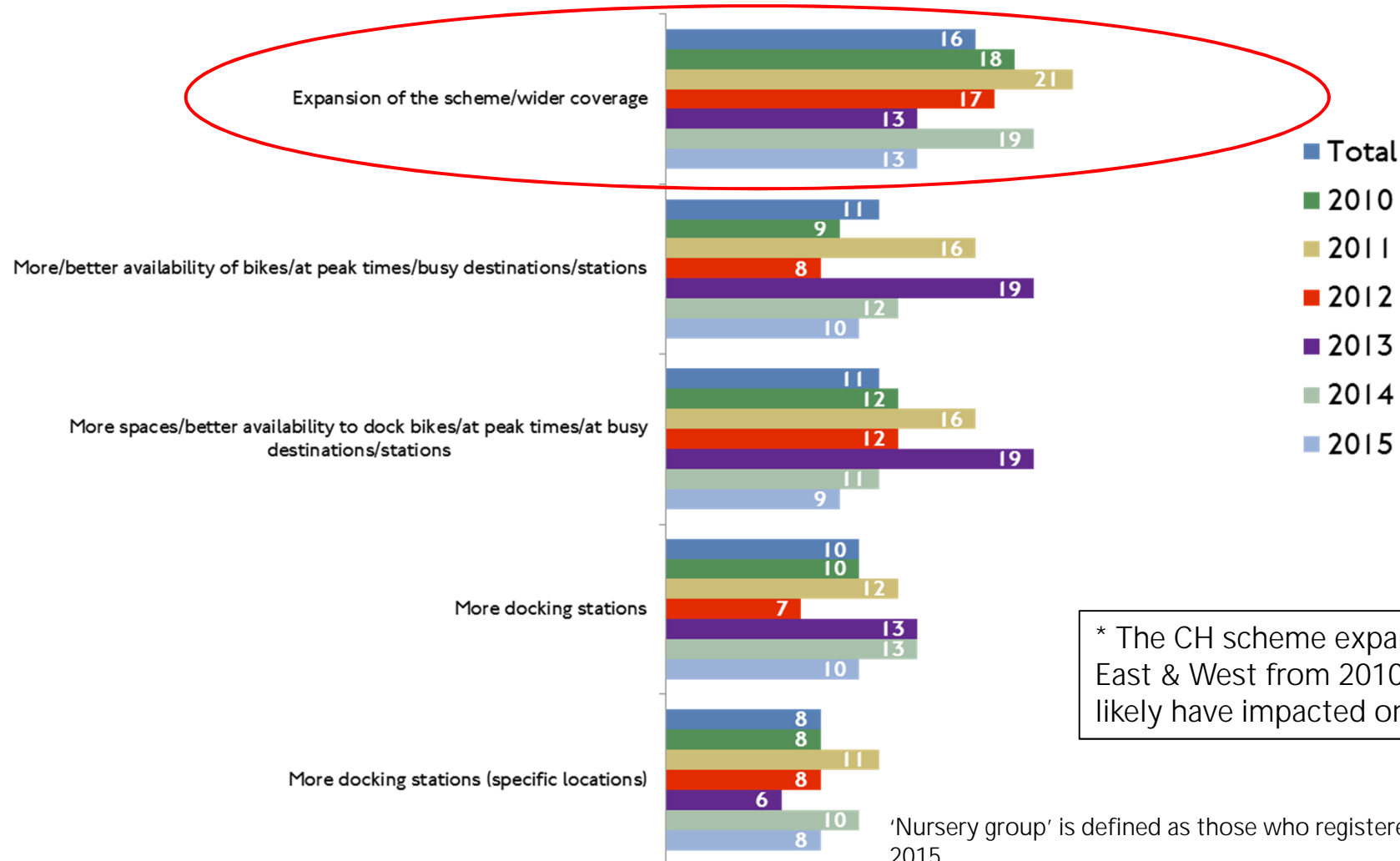


'Nursery group' is defined as those who registered as a CH Member in 2015
Source: Santander Cycles Members CSS, TNS, Q3-2015/16

QH6a. My first motivated to use Cycle Hire **Base:** 1055 (2015 registration only)

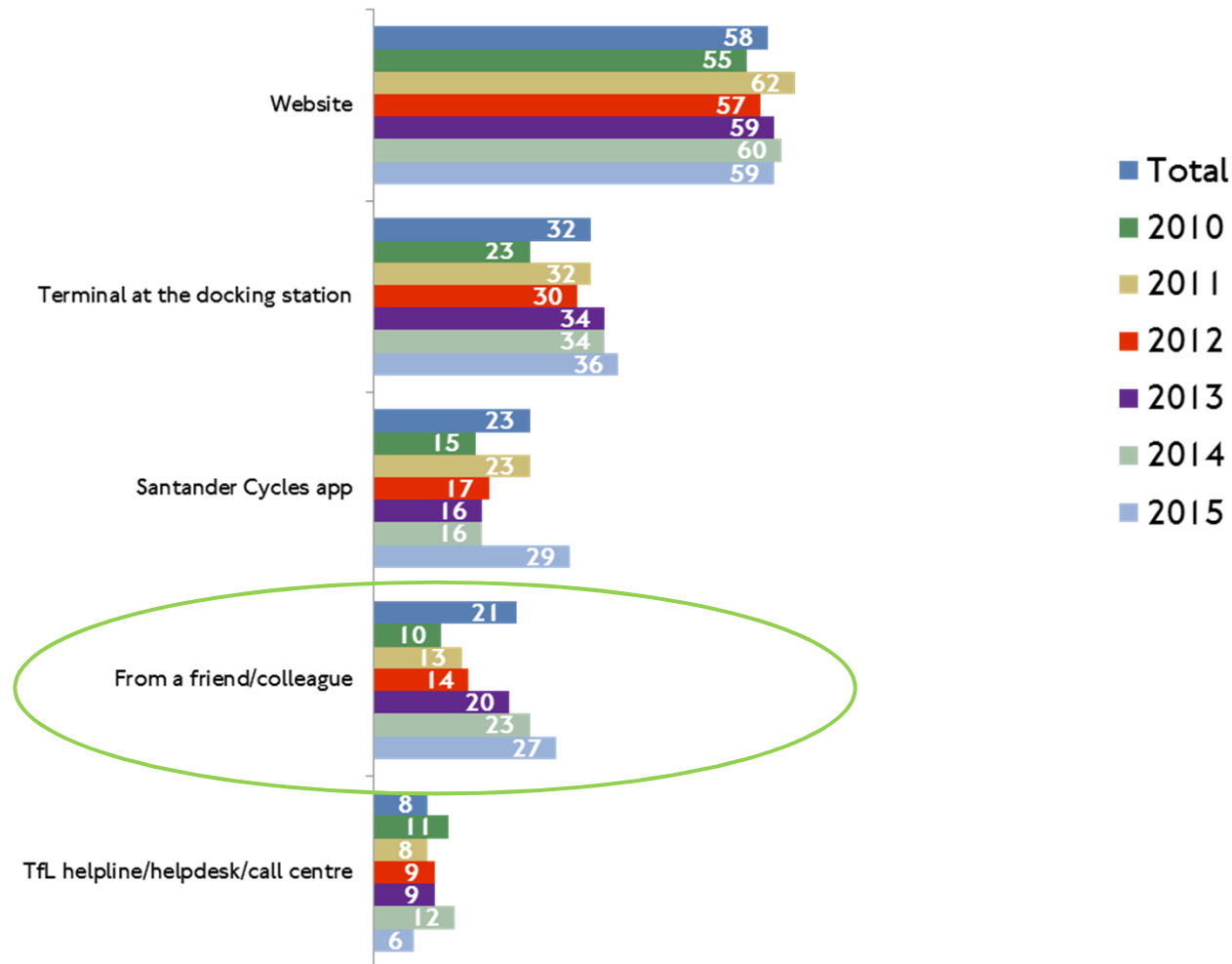
New members would be most encouraged by more docking stations, but to a lesser extent than longer term members*

What would encourage you to use CH more?



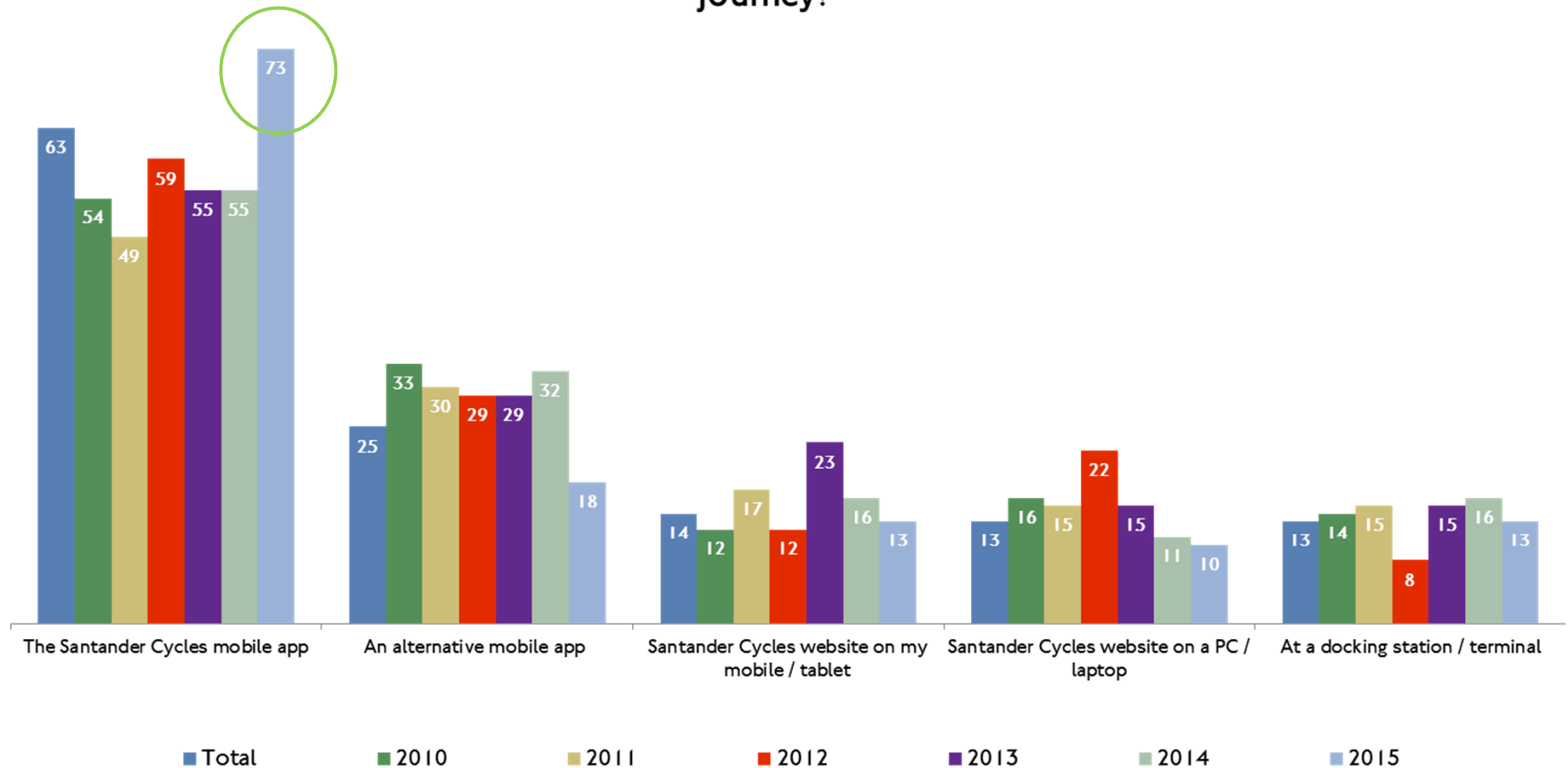
Word of mouth is increasing as a channel of information on Cycle Hire

From where did you get information on how Cycle Hire works?



New members are more likely than average to be using a mobile app to check for the availability of bikes before making a journey

How do you check the availability of BIKES before making a Barclays Cycle Hire journey?



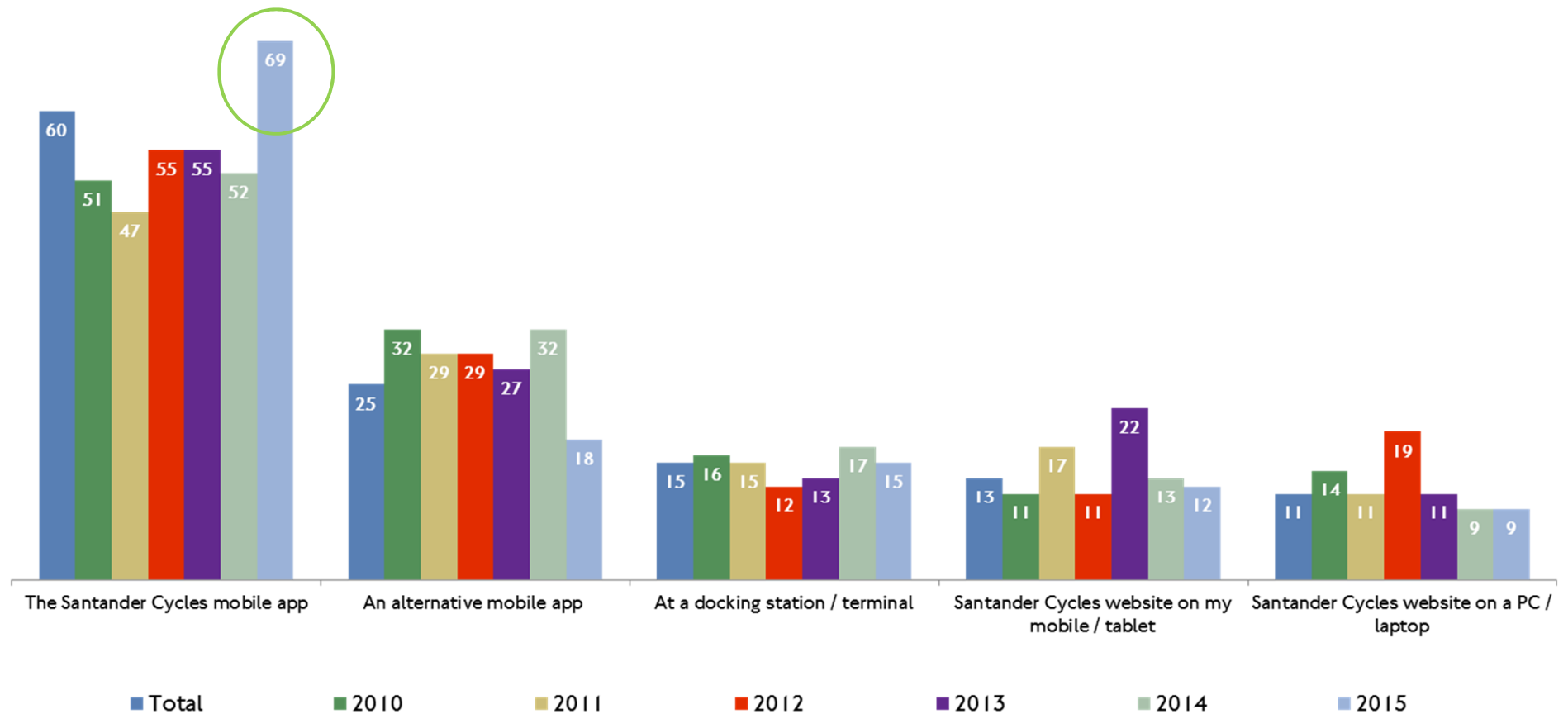
'Nursery group' is defined as those who registered as a CH Member in 2015

Source: Santander Cycles Members CSS, TNS, Q3-2015/16

QD11. How check the availability of BICYLES before making a journey Base: 2071 (all who check availability before making a journey)

And also more likely than average to be using a mobile app to check for the availability of spaces before making a journey

How do you check the availability of SPACES before making a Barclays Cycle Hire journey?



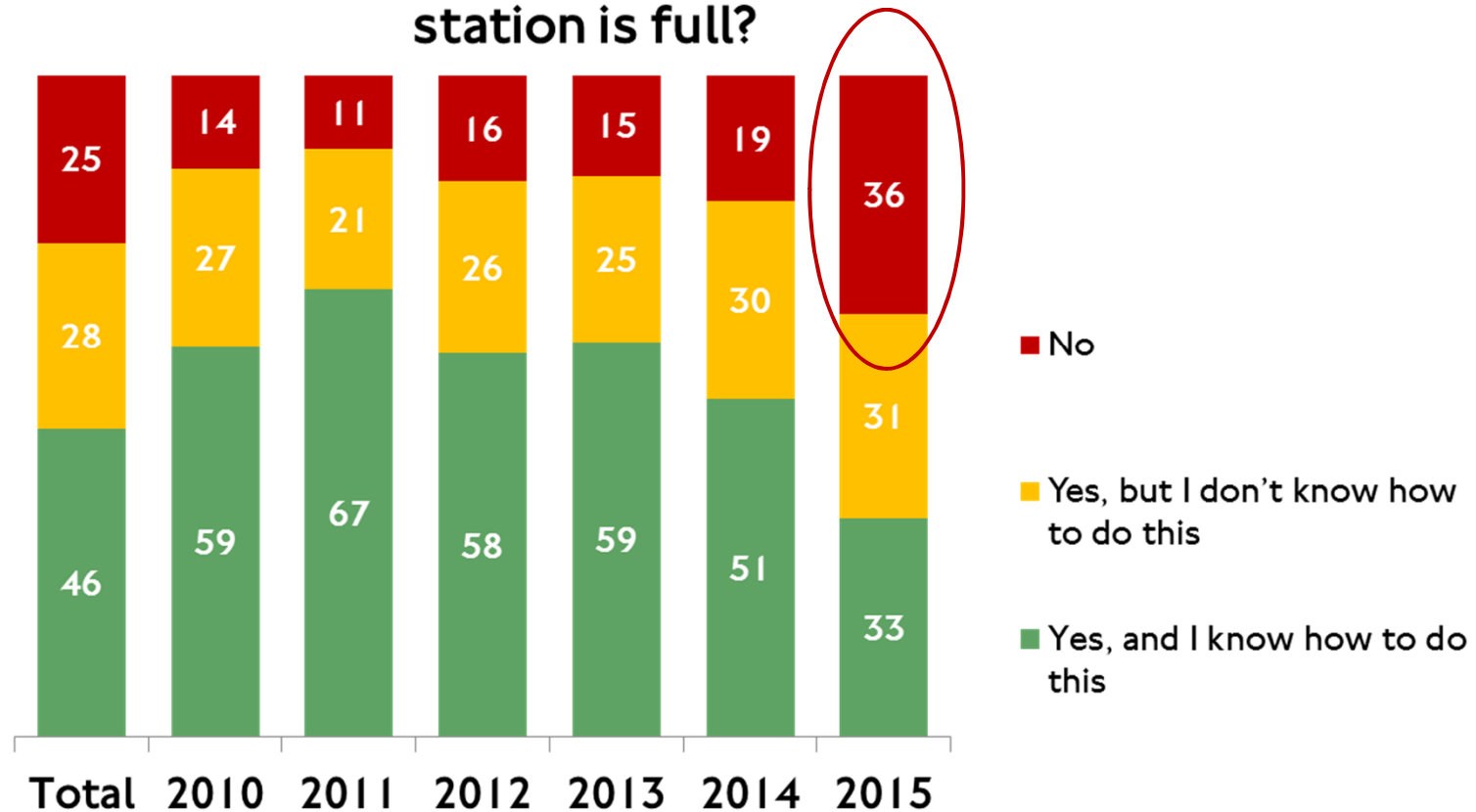
'Nursery group' is defined as those who registered as a CH Member in 2015

Source: Santander Cycles Members CSS, TNS, Q3-2015/16

QD11. How check the availability of SPACES before making a journey **Base:** 2071 (all who check availability before making a journey)

Members who joined in 2015 are less likely to be aware of the additional 15 minutes available (if a dock is full)

Aware of the 15 minutes addition time if docking station is full?



'Nursery group' is defined as those who registered as a CH Member in 2015

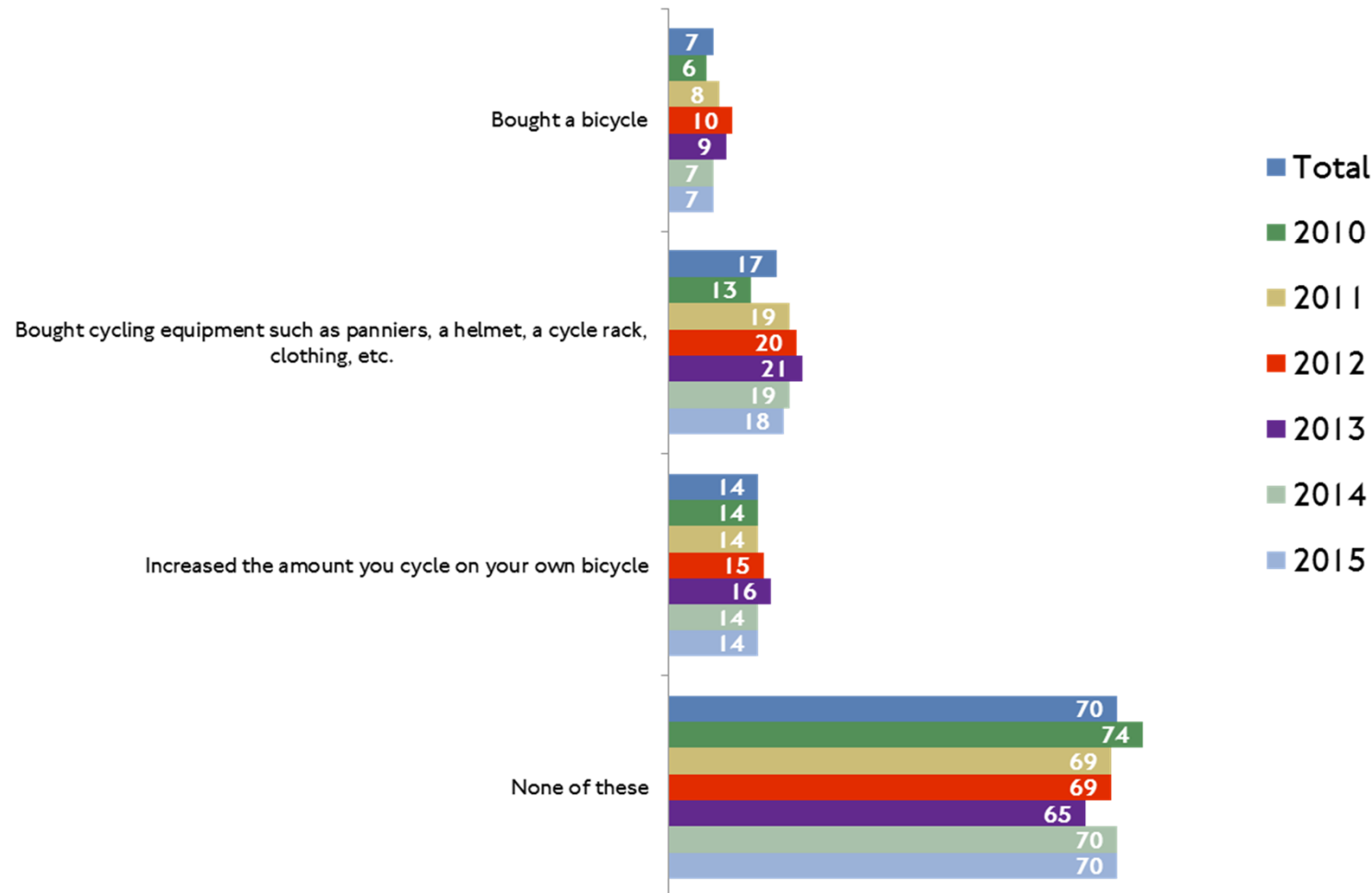
Source: Santander Cycles Members CSS, TNS, Q3-2015/16

QD5. Were you aware that you can get 15 minutes additional time, at no extra cost, if a docking station is full and you are unable to dock a bicycle **Base:** 2455

Impact

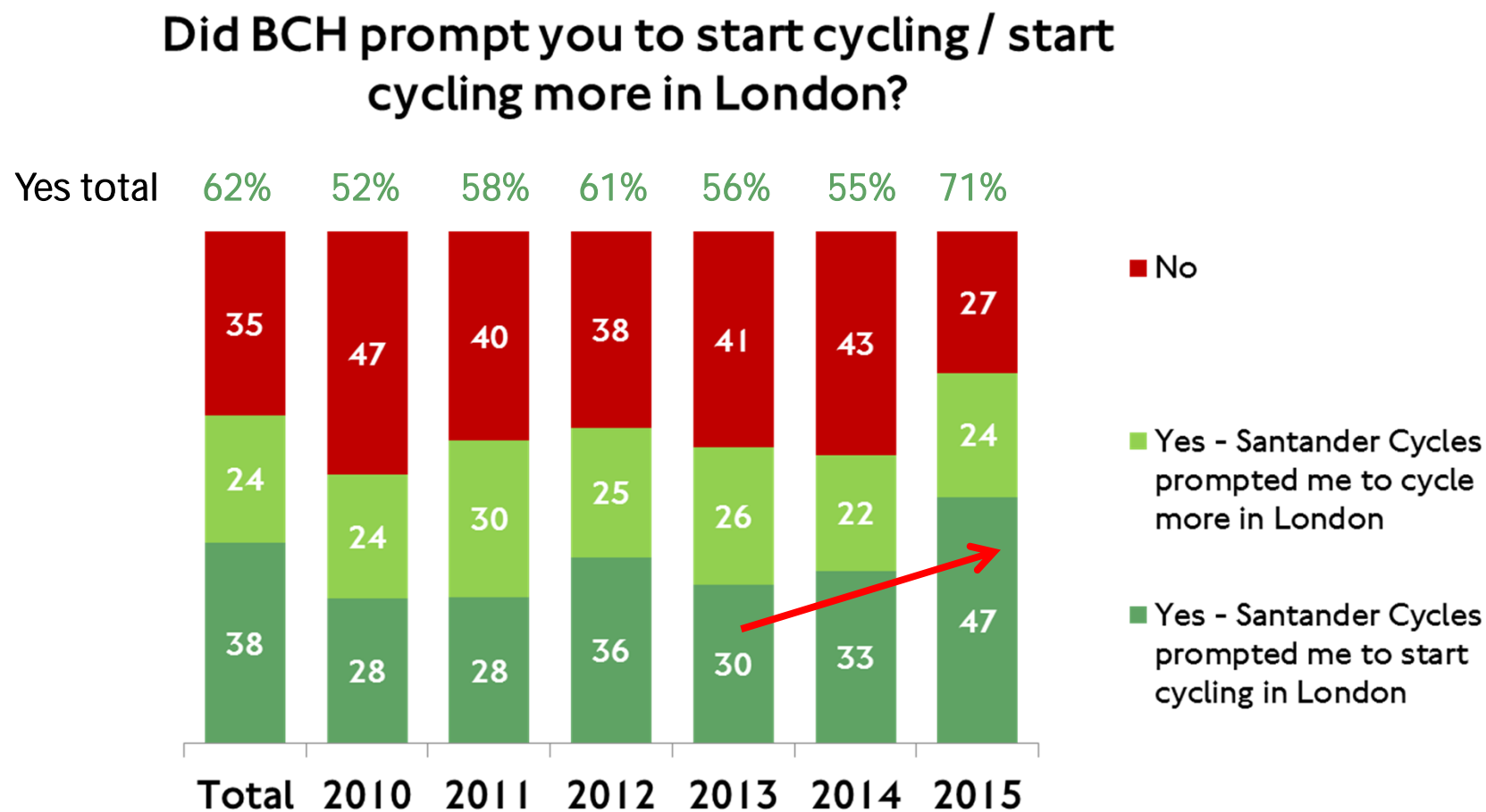
All member are equally likely to claim they have taken steps towards increasing levels of cycling

Have you done any of the following as a result of the introduction of the BCH...



'Nursery group' is defined as those who registered as a CH Member in 2015
 Source: Santander Cycles Members CSS, TNS, Q3-2015/16

Newer members are most likely to claim that CH has prompted them to start cycling/cycle more



'Nursery group' is defined as those who registered as a CH Member in 2015

Source: Santander Cycles Members CSS, TNS, Q3-2015/16

QJ20 Did BCH prompt you to start cycling / start cycling more in London Base: 2455

Bibliography: Nursery Group

- Santander Cycles Customer Satisfaction and Usage Survey (Members), TNS, Q3 2015/16 (W11)
- The role of incentives in cycling & walking behaviour, 2CV, January 2013
- Attitudes towards cycling, Future Thinking, September 2015
- Barriers and tipping points to cycling among low income target groups, 2CV, May 2011
- Understanding the Barclays Cycle Hire Market, SDG, November 2013