

**Barclays Cycle Hire
customer satisfaction and
usage – wave 2**

10102

September 2011

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Research conducted by Ipsos MORI

What we will be covering today

1. Survey methodology
2. Key findings
3. Members' and Casuals' profiles
4. Travel behaviour
5. Key measures
6. Satisfaction with Barclays Cycle Hire
7. Drivers of satisfaction

1. Survey methodology

Methodology and approach

Members

- 2,652 interviews completed online
- 4th – 8th July 2011
- 30,000 invites sent
- Response rate of 9%
- Active and inactive members invited to take part
- Sample was taken from TfL's database of registered users
- Data is unweighted
- Combined data for members and casuals is weighted to reflect the population split between members and casuals

Casuals

- 1,034 face to face interviews in two waves
 - W1: 395 f2f interviews of which 26 completed online questionnaire
 - W2: 639 f2f interviews (cut down version of overall set of questions)
- 29th June – 1st August 2011
- Interviews took place at BCH docking stations with casual users docking bicycles
- Data is weighted to match the population of casuals docking bicycles at each DS and to match weekend/ weekday usage

2. Key findings

Key findings – overall attitudes

Satisfaction

- Overall satisfaction for members and casuals combined is 65 out of 100 (versus 69 for casuals and 63 for members).
- Members' overall satisfaction has fallen since last year's score of 70, just over a third (35%) are satisfied.
 - The biggest drop in satisfaction of their key touchpoints was for the ease of using the membership key (from 67% to 46% satisfied).
- Over two-fifths (44%) of casuals are satisfied.

Advocacy

- Advocacy ratings are strong overall. It is higher than satisfaction for both groups, however members ratings have fallen since wave 1.
- Three-fifths (60%) of members would recommend BCH to friends and family vs 63% of casuals.

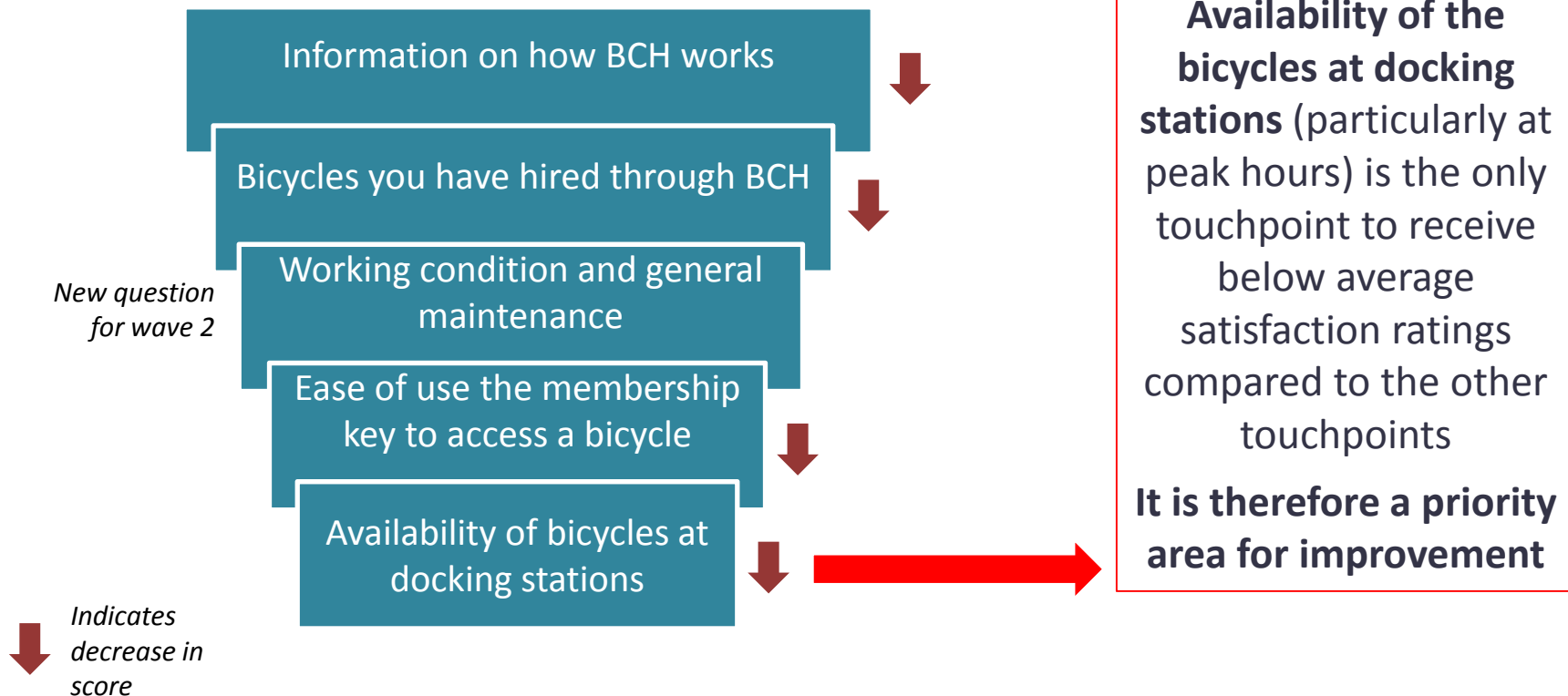
A trend of declining scores across all measures for members suggests BCH novelty has worn off and cyclists are becoming more critical of the BCH offer.



Key findings – key drivers of members' satisfaction

Where asked over both waves of research, member satisfaction with each touchpoint has declined.

Five touchpoints have **above average impact** on overall satisfaction (in order of impact; ie information on how BCH works has the biggest impact on overall satisfaction):



Key findings – overall behaviour

Trip types

- Members make trips with BCH most frequently for commuting (57%).
- Casuals are more likely to use BCH for leisure (62%).

Reasons for use

- BCH being quicker is a key reason for members either making a new trip with BCH or switching to BCH from an existing trip.
 - Health and convenience are also frequently mentioned reasons.
- **'Fun'** is increasingly a reason for using BCH for both members and casuals, in addition to speed, convenience and health. Casuals see fun as a reason for using BCH in itself, while members tend to use BCH for other reasons – but say it is more fun than other transport options available.

Started cycling

- About half (52%) of members started cycling more than a year ago. Seven-in-ten say BCH prompted them either to start cycling or start cycling more in the last year.
- 13% say that as a result of BCH they have increased amount they cycle.

Bicycle ownership

- More members' households now own one or more bikes compared to wave 1.
- Among members, 6% say they have bought a bike as a result of BCH, and 15% have bought more cycle equipment.

Profile of users

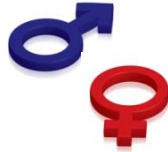
- Members more likely to be aged 35-54; casuals more likely to be aged 16-34.

Despite declining satisfaction ratings, BCH is perceived as quick, convenient and fun by many and is encouraging some to cycle more.

3. Members' and Casuals' profiles

Who are your users (1)

Key demographics



Members:

- **More likely to be aged between 35-54 (54%)**
- Three-quarters (77%) are men*
- 71% live in London, 21% in the South East
- Over 9 in 10 working (mostly full time)

Casuals:

- **More likely to be aged between 16-34 (76%)**
- 60% are men, 37% female
- 62% live in London. A quarter live outside the UK

Residence and reason for being in London



Members:

- Living and/or working in London main reasons for being in London:
 - London resident 39%
 - Live and work in London 29%
 - Work in London (non-resident) 23%

Casuals:

- Living in London main reason for being in London:
 - London resident 57%
 - In London as a tourist 18%
 - Shopping/ leisure 8%
 - Live and work in London 8%



Who are your users (2)

Level of access

Members:

- 58% have annual access
- 40% have a 24 hour access period
- 1% 7 day access



Journey purpose

Members:

- **46% commuting**
- 15% leisure
- 9% employer business
- 9% personal business



Frequency of use

Members:

- At least once a week (59%)
- Between once a week and once every six months (35%)



Casuals:

- At least once a week (24%)
- Between once a week and once every six months (28%)
- For 47% of casuals it was the first time they had used the scheme

Time of use

Members:

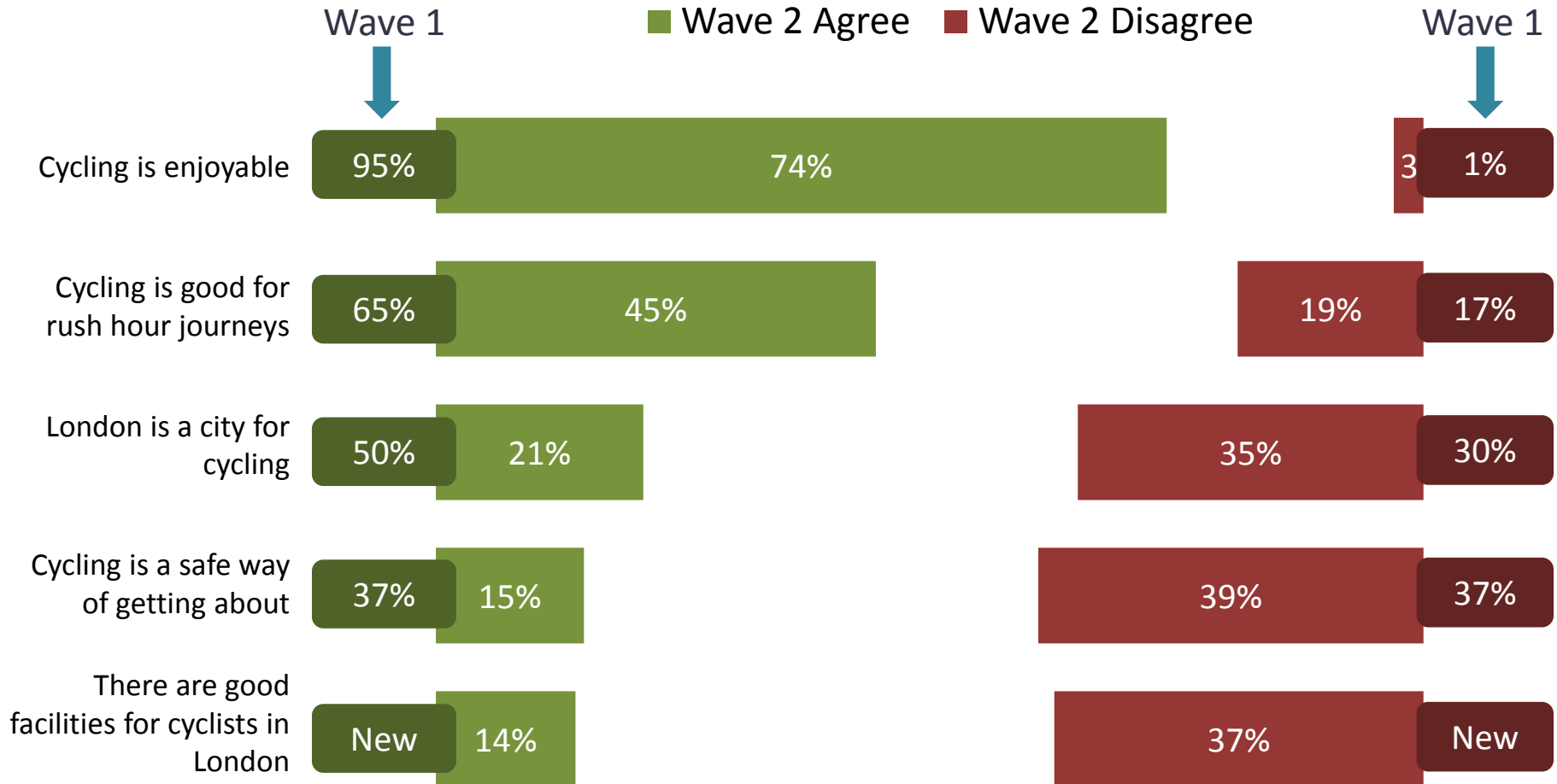
- 7am – 10am 33%
- 10am – 4pm 32%
- 4pm – 7pm 24%



4. Travel behaviour and general attitudes to BCH

Cycling is seen by members as enjoyable and good for rush hour journeys; but fewer agree than last year

Q To what extent do you agree or disagree with the following statements about cycling in general ...?



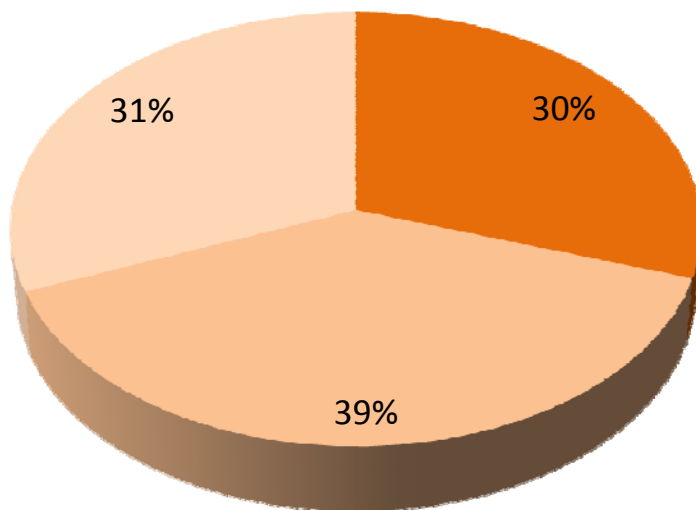
Base: All members: W1: 3,754, W2: 2,652

Mixed views from casuals as to whether London is a city for cycling

Q To what extent do you agree or disagree that London is a city for cycling?

Casuals*

Disagree



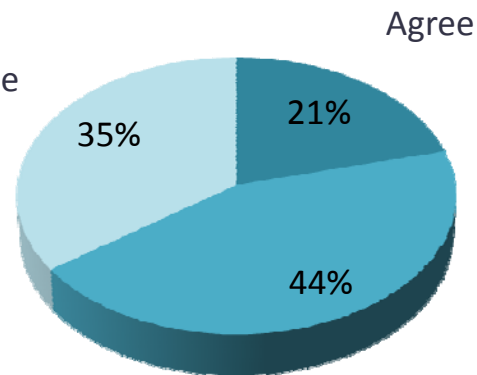
Agree

Neither/
nor



Members*

Disagree



Agree

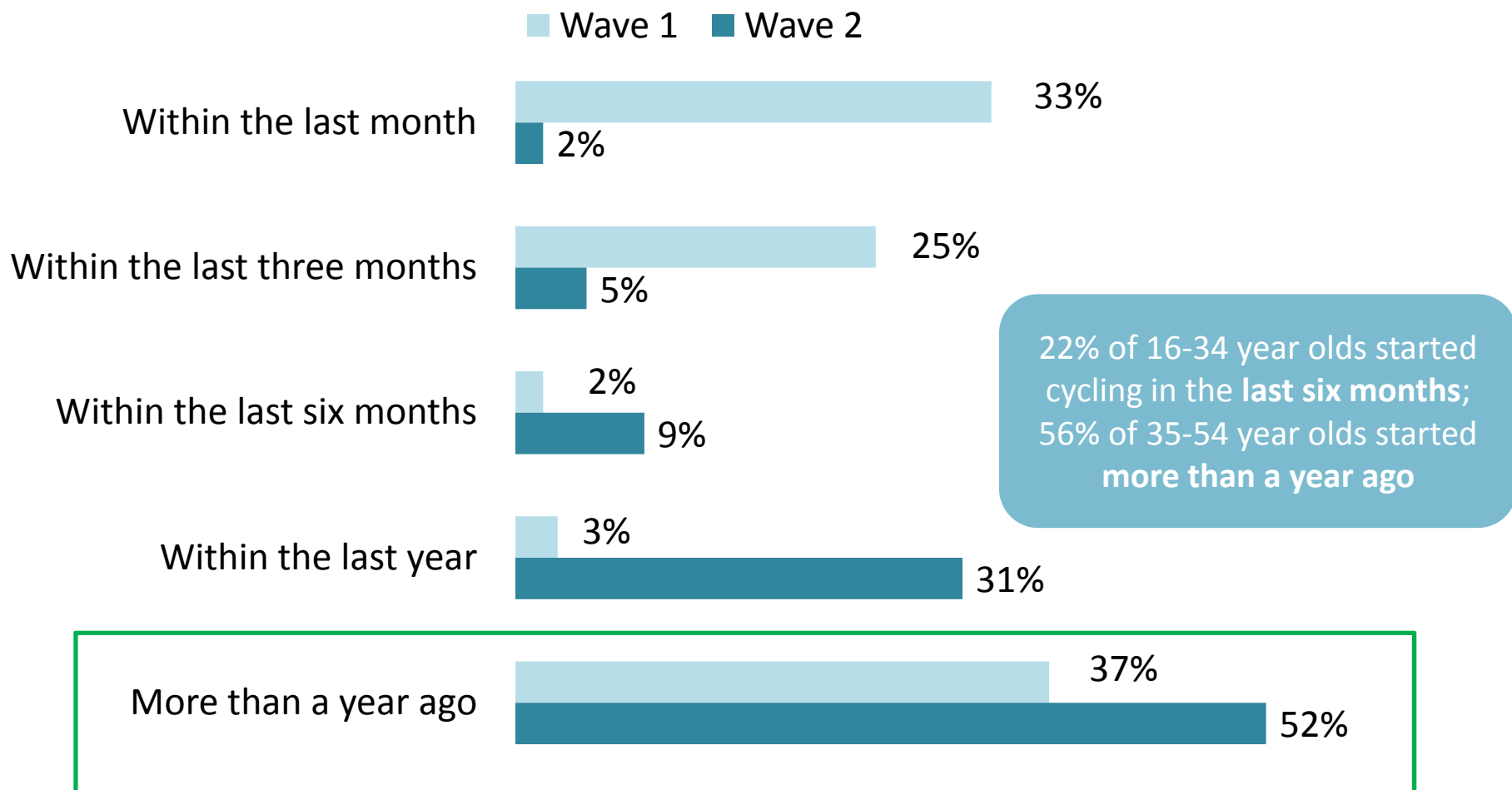
Neither/
nor

Base: All casuals: 665; all members: 2,652

*NB. Casuals were asked on a five point scale, members on a ten point scale

Half of members started cycling in London over a year ago

Q When did you start cycling in Greater London, that is anywhere in the London boroughs?*



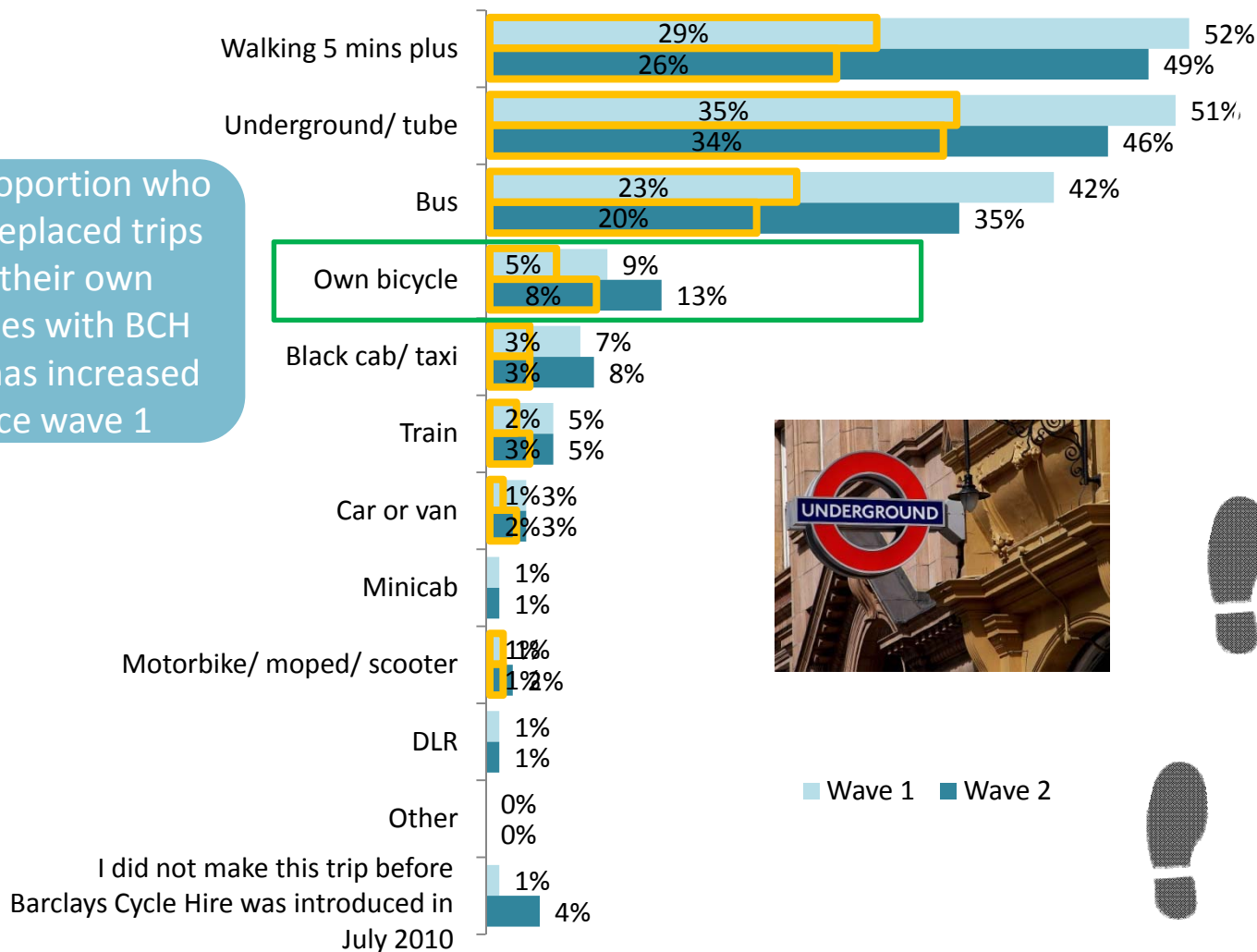
Base: All members: W1: 3,754, W2: 2,652

* Wave 1 question wording: When did you start cycling in London?

BCH most likely to have replaced walking and tube as a journey mode

Q Before the Barclays Cycle Hire Scheme was introduced in July this/last year, how would you typically have made this trip?

Any mode Main mode



The proportion who have replaced trips on their own bicycles with BCH trips has increased since wave 1



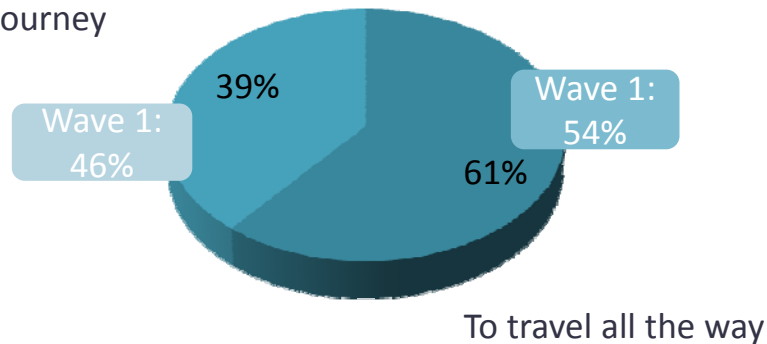
Wave 1 Wave 2

Base: All members who have made this trip before: W1: 1,199, W2: 2,177

Three-in-five use BCH for their whole journey; train is most likely additional transport for multi-mode journeys

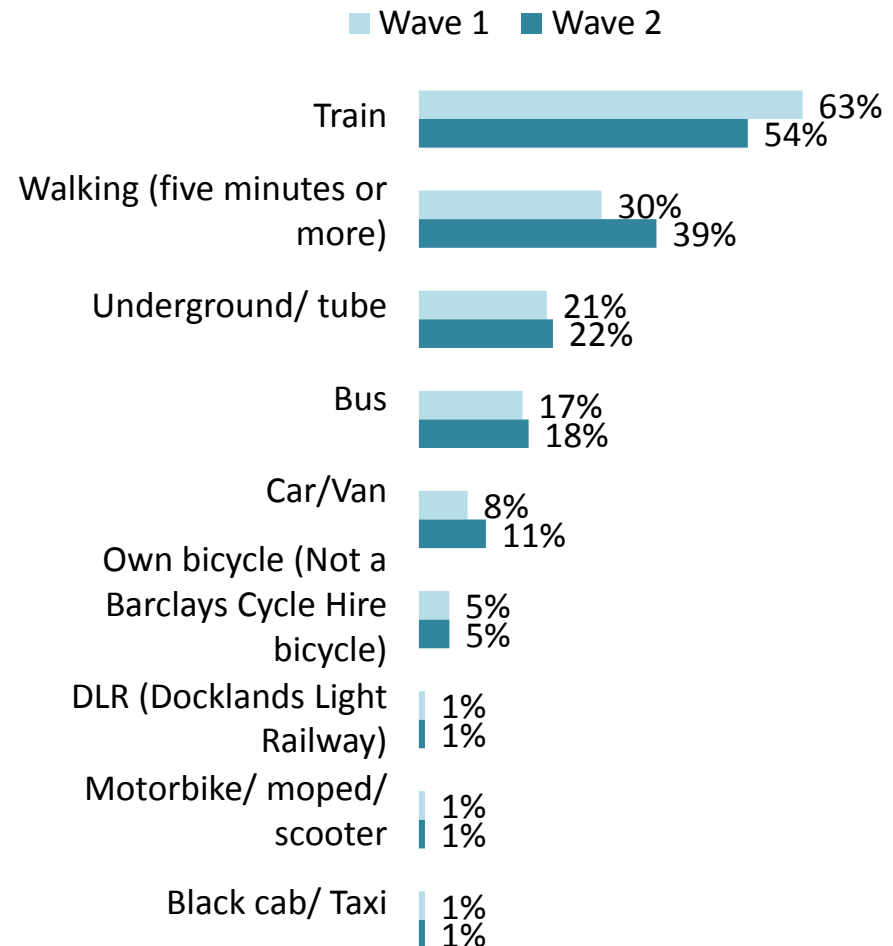
Q Did you use the Barclays Cycle Hire bicycle... ?

As part of a longer journey



68% of weekend users and 67% of off peak users **travel all the way with BCH**

Q What other methods of transport did you use on this journey



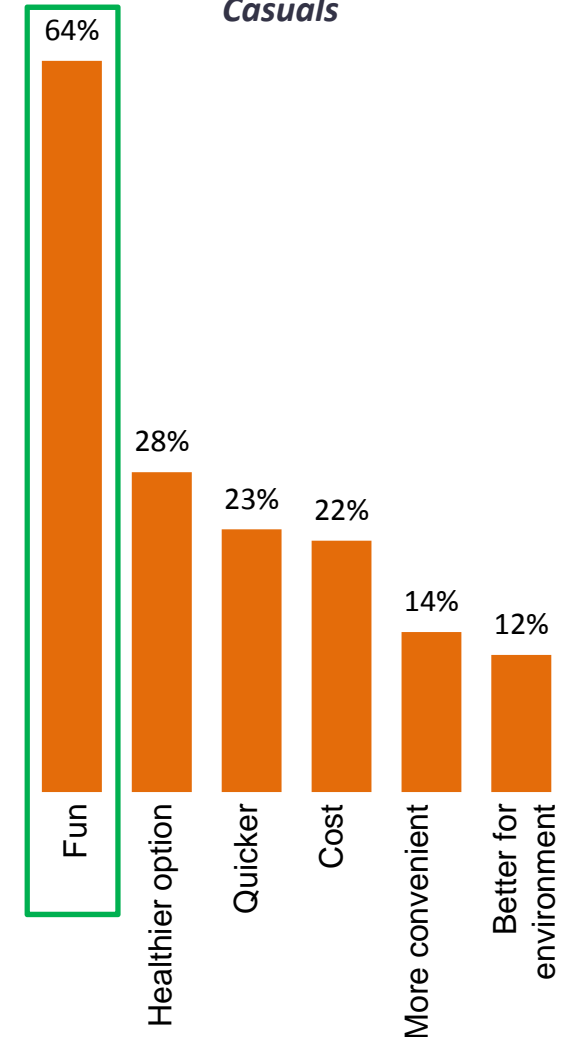
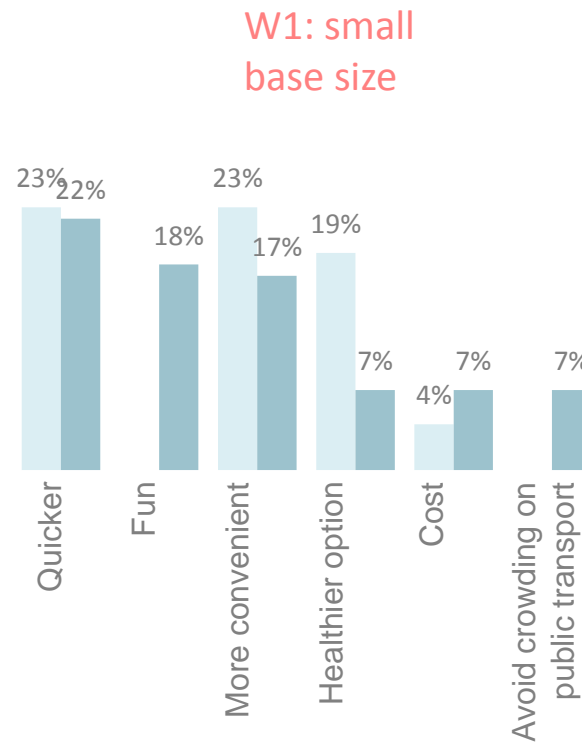
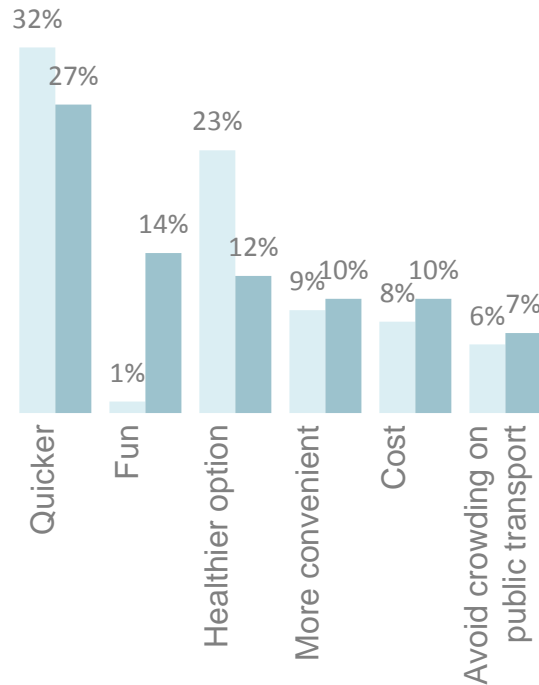
‘Quicker’ key reason for switching; ‘fun’ main reason for use among casuals

Top main reasons for switching to BCH for existing journey
Members

Top main reasons for using BCH for new journey
Members

Top main reasons for using BCH
Casuals

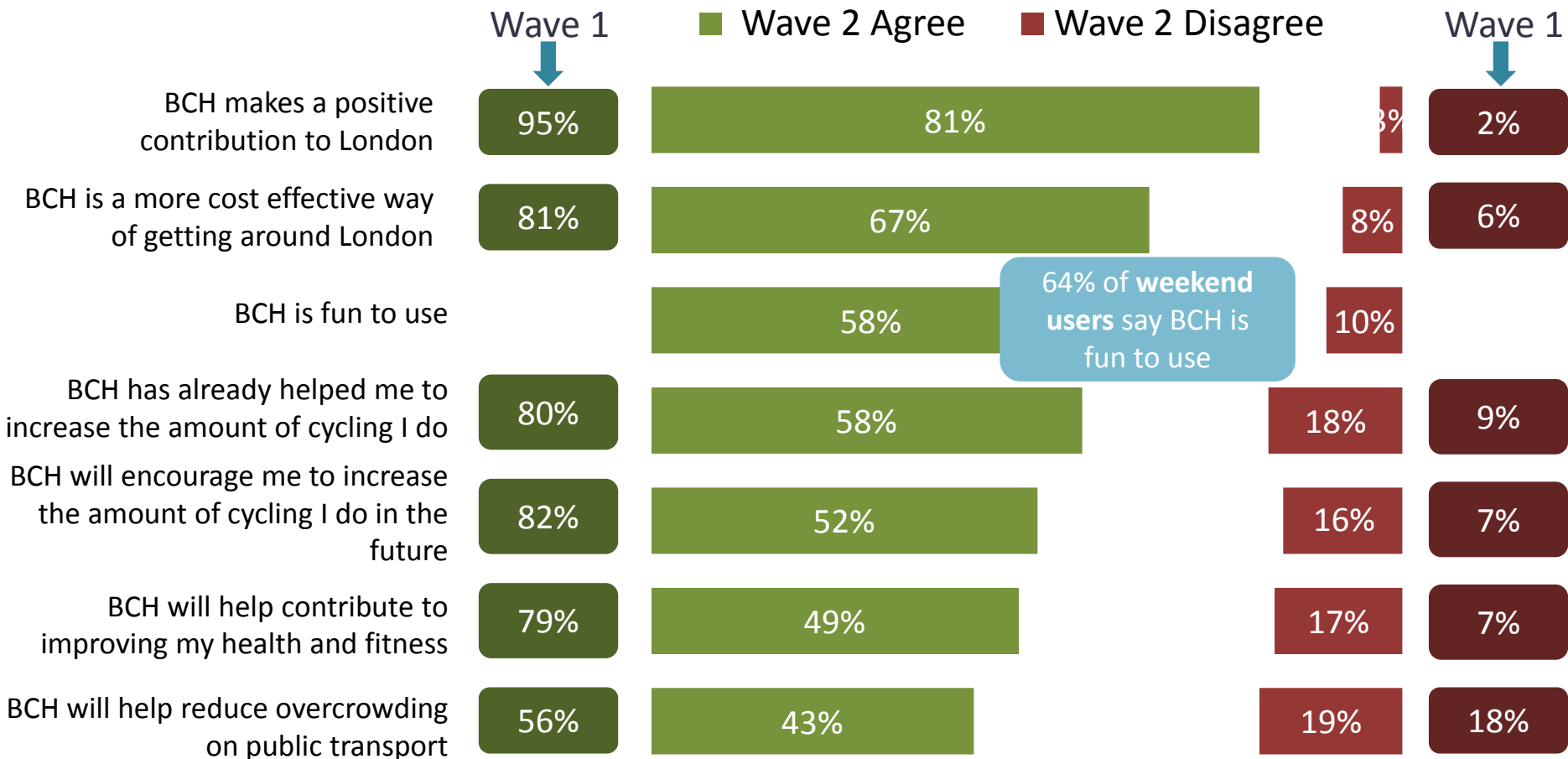
Wave 1 Wave 2



Base: All members who have made this trip before using BCH: W1: 1,183, W2: 2100; all members who have not made this trip before using BCH: W1: 47, W2: 475; all casuals: 639

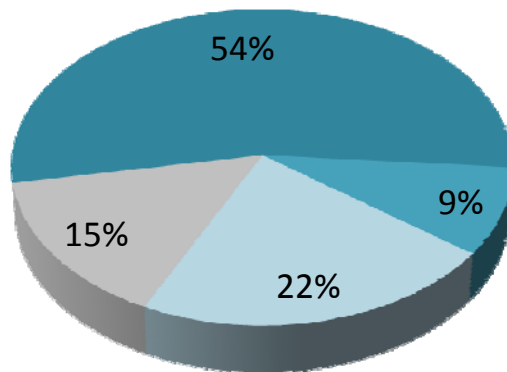
BCH perceived to have a positive impact on London; almost three-in-five members agree BCH is fun to use

Q Here are a number of statements that people have made about the likely effects of Barclays Cycle Hire. How strongly do you agree or disagree with each of these statements?



Over half intend to renew membership; one-in-ten say they will not

Q Thinking about your membership, are you intending to renew your membership when it runs out?



- Yes
- No
- Not applicable - I selected to auto-renew my access fee
- Don't know

Members who do not intend to renew are **less satisfied** across every touchpoint than members who intend to renew or have selected auto-renew.

69% **registered** July to September 2010

15% registered October to December 2010

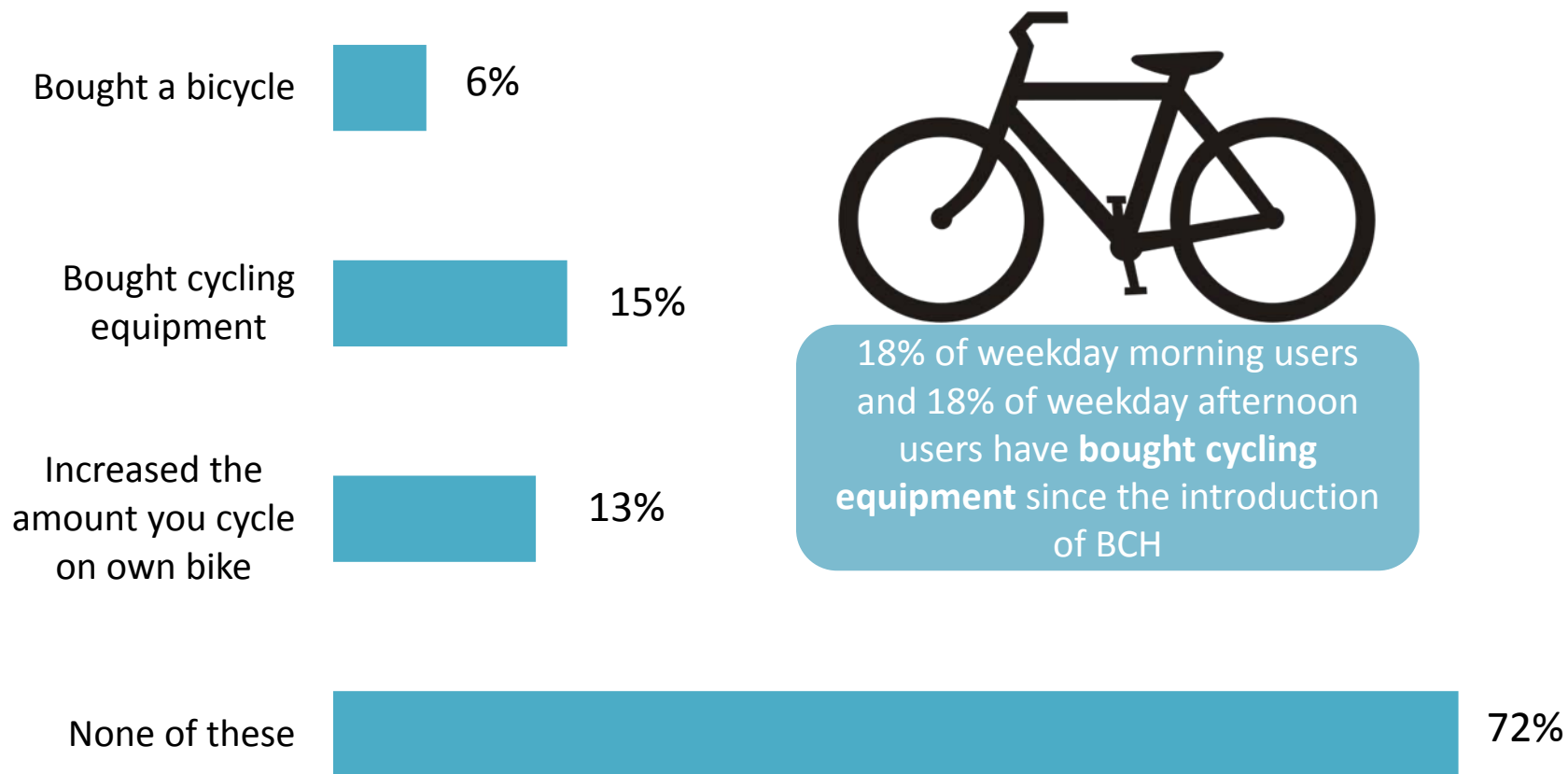
10% registered January to March 2011

7% registered April to May 2011

Base: All members: 2,652

6% have bought a bicycle as a result of the scheme

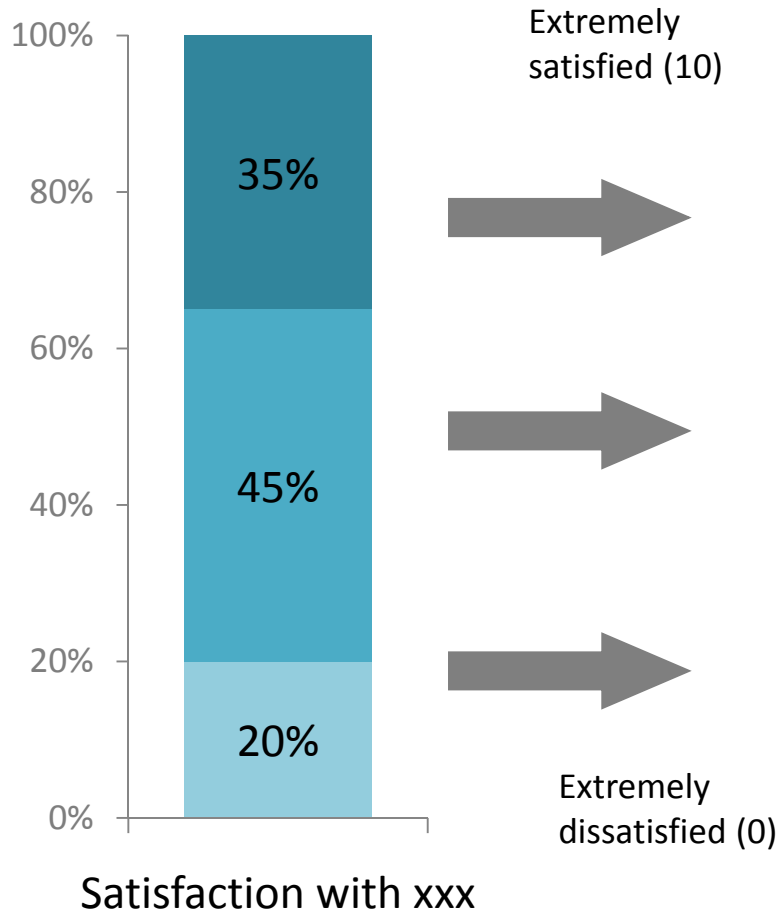
Q Have you done any of the following as a result of the introduction of the Barclays Cycle Hire?



5. Key measures

How we report satisfaction

Q How satisfied are you with xxx on a scale from 0 to 10?



Throughout this survey, satisfaction is asked on a 0-10 scale, where 10 is extremely satisfied and 0 is extremely dissatisfied

Satisfaction scores are broken down into three 'boxes' to distinguish between those who are satisfied, dissatisfied and in the middle

The 'top box' includes those who are very satisfied – i.e. those giving answers of 8 or 10.

The 'middle box' respondents are those saying 5-7

the 'bottom box' comprises those who are dissatisfied – i.e. those saying 0-4



or



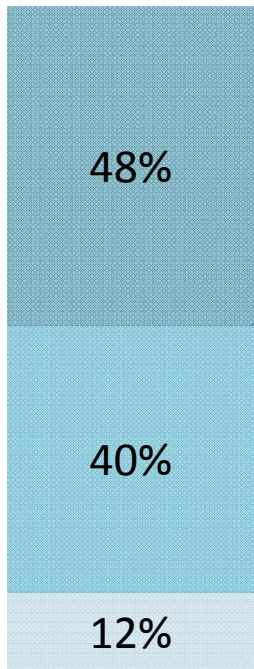
Indicates significant change in mean score since wave 1

Member satisfaction decreasing; casuals more likely to be satisfied than members

Q Taking everything into account, how satisfied are you with your overall experience of Barclays Cycle Hire? *

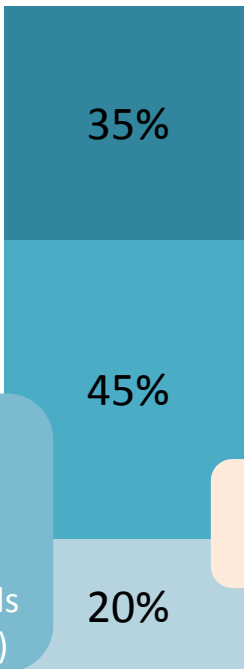
Wave 1

Members
Mean score
70

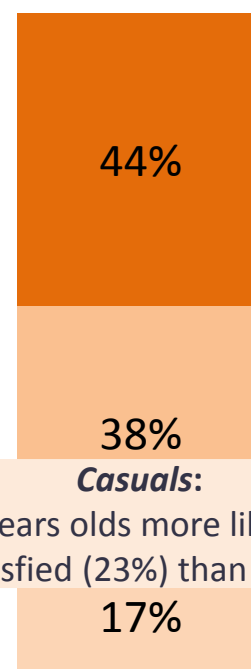


Wave 2

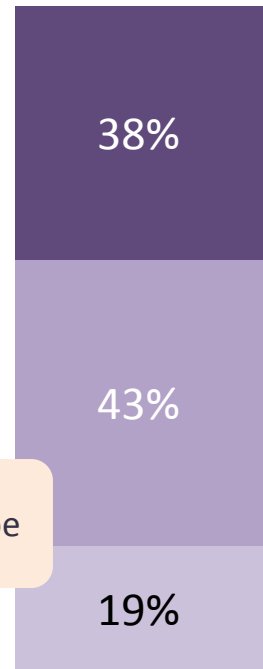
Members
Mean score
63



Casuals
Mean score
69



Overall
Mean score
65



Members:

16-34 years olds more likely to be dissatisfied (22%) than 35-54 year olds (19%) or 55+ (15%)

Casuals:

35-54 years olds more likely to be dissatisfied (23%) than average

0-4 5-7 8-10

Other scores for comparison: Buses 80¹ LU 79¹ London Overground 82¹ Car 72² Cycle 67²

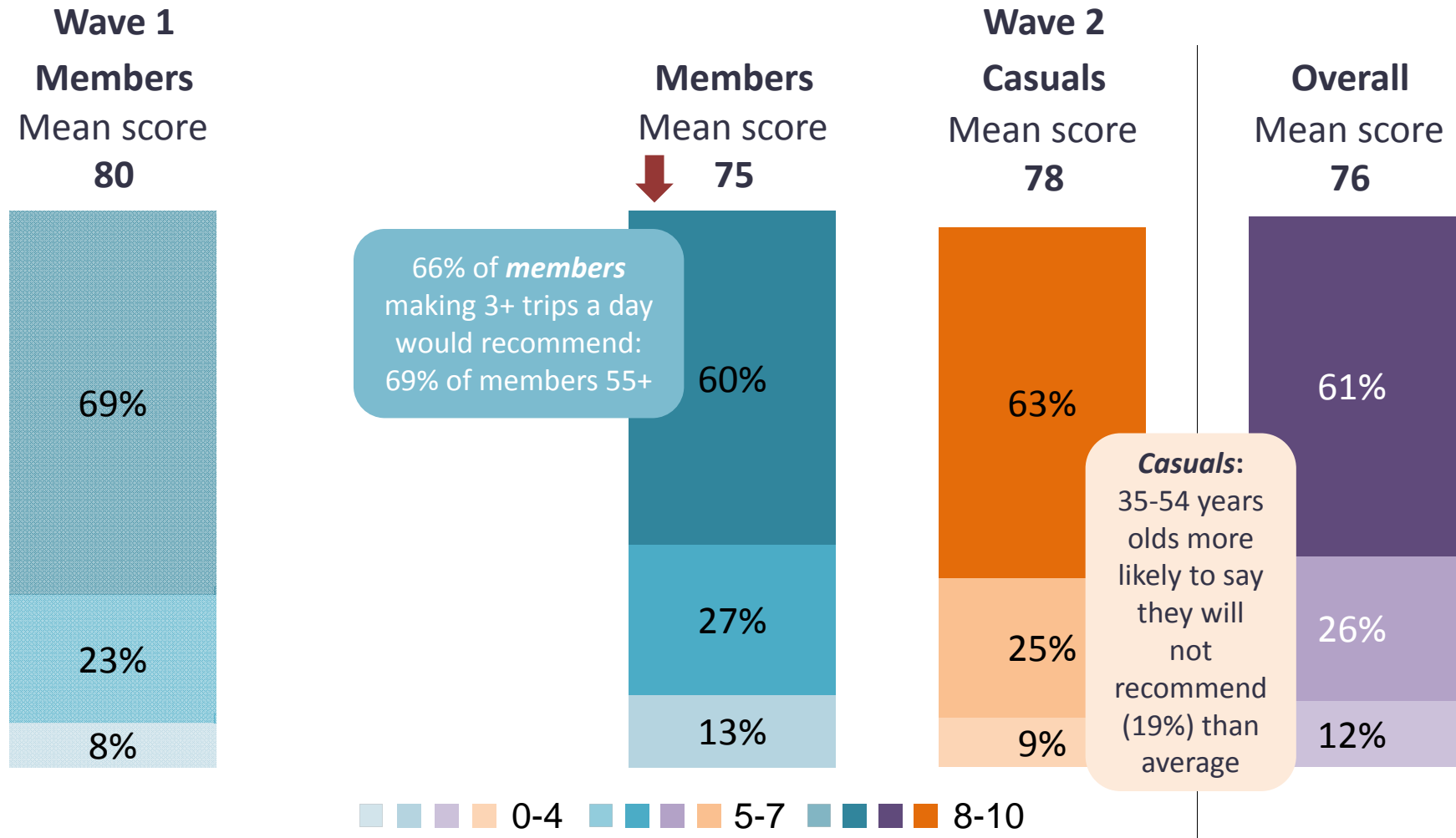
Source: ¹ Modal CSS surveys qtr 1 (April – June) 2011; ²TLRN User CSS Autumn 2010

Base: All users W1: 3,754; W2: 3,686; all members: 2,652; all casuals: 1,034

*Casuals question wording: Taking everything into account, how satisfied are you with your overall experience of Barclays Cycle Hire today?

Advocacy also decreasing among members; similar advocacy levels between members and casuals

Q How likely would you be to recommend Barclays Cycle Hire to friends or family

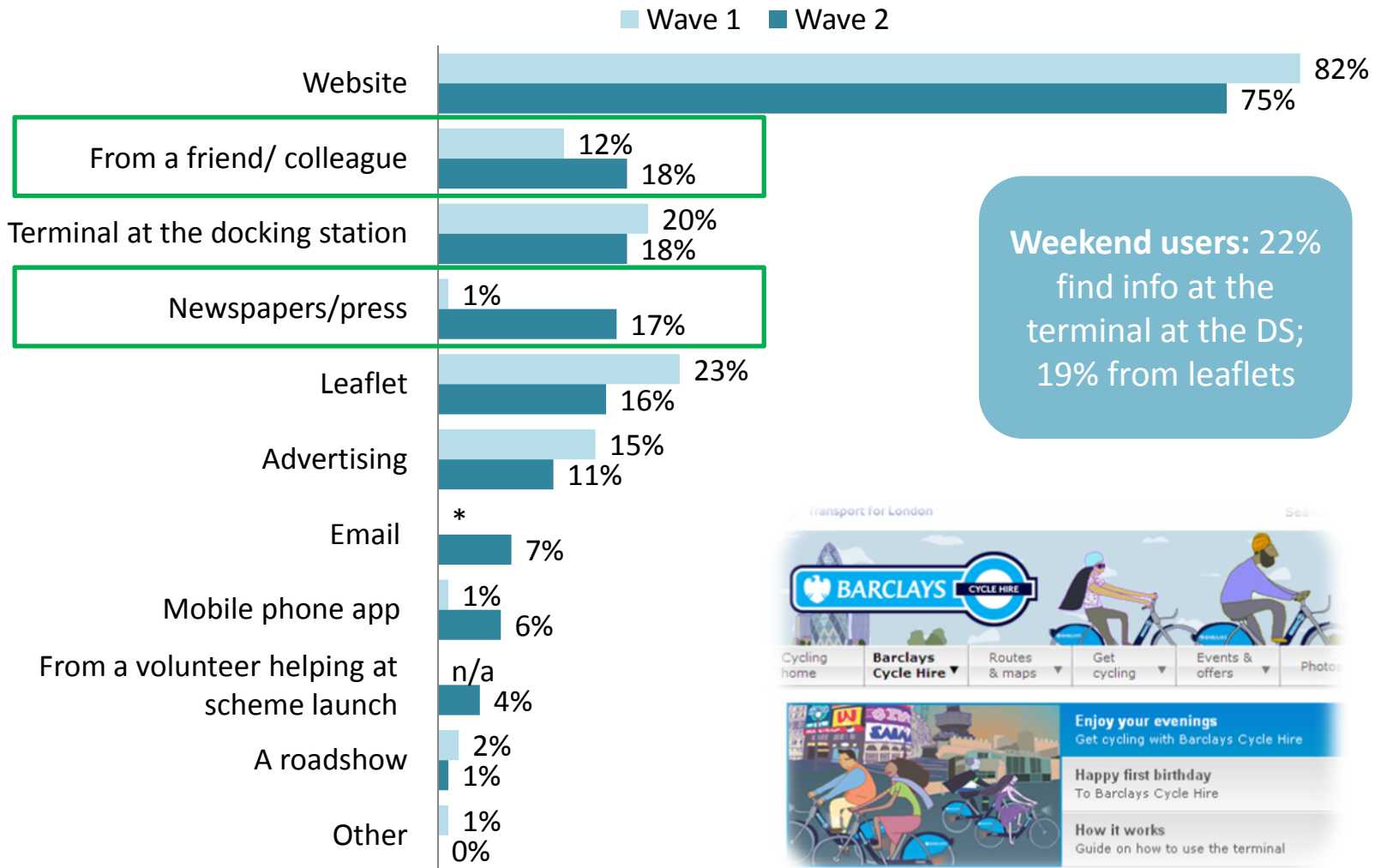


Base: All users W1: 3,754; W2: 3,686; all members: 2,652; all casuals: 1,034

6. Satisfaction with Barclays Cycle Hire

BCH website remains a key source of information for members; friends/ colleagues and the press grow as sources

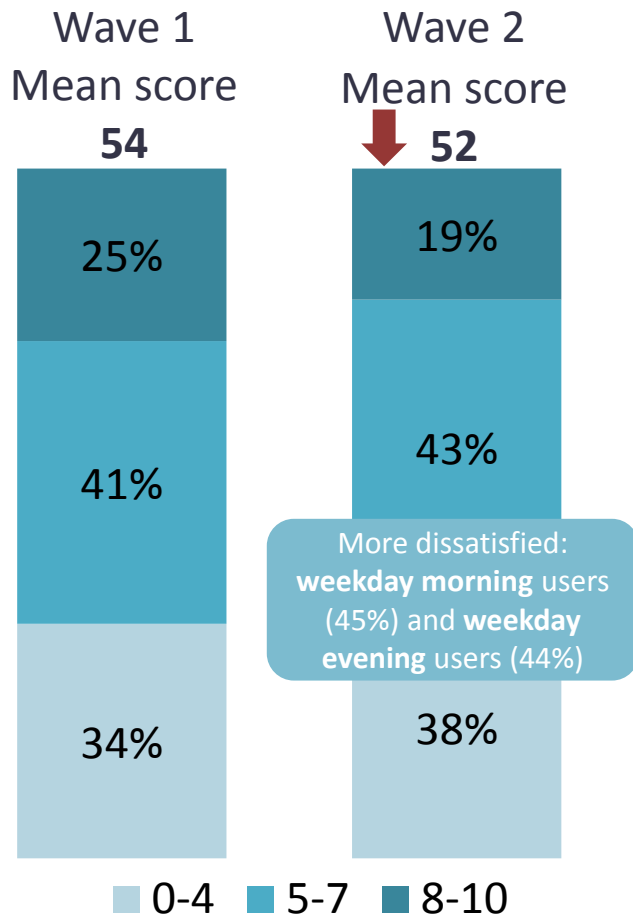
Q From where did you get information on how Barclays Cycle Hire works?



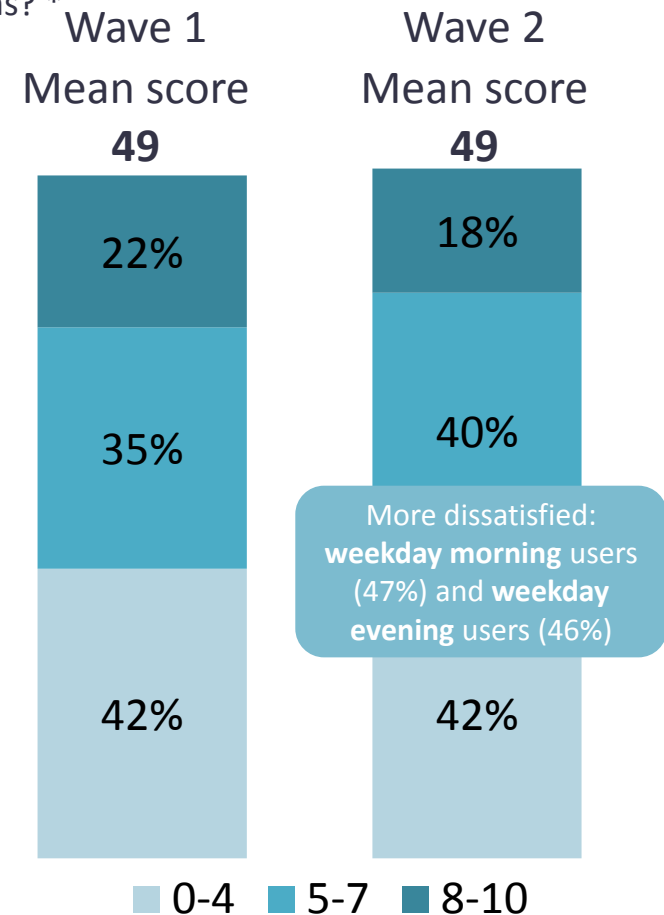
Base: All members; W1: 3,754; W2: 2,652

Members' satisfaction with availability at docking stations is decreasing

Q How satisfied are you with the availability of bicycles at docking stations?



Q How satisfied are you with the availability of free docking points to return bicycles at docking stations? *



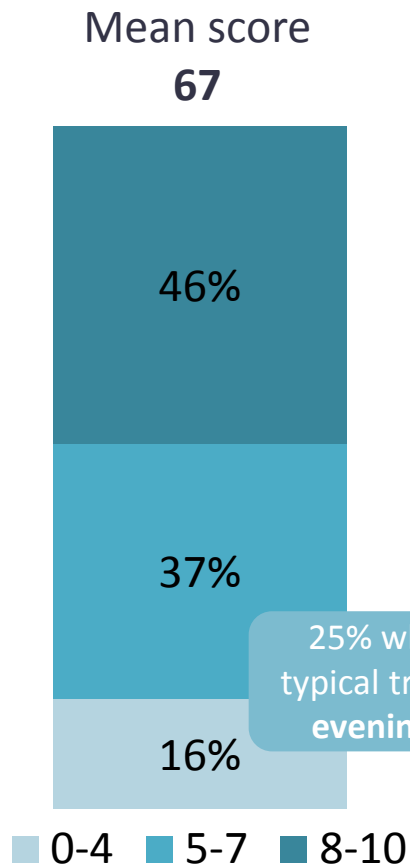
"Rides per bike" figures are on average higher on weekdays than at weekends

Base: All members: W1: 3,754, W2: 2,652

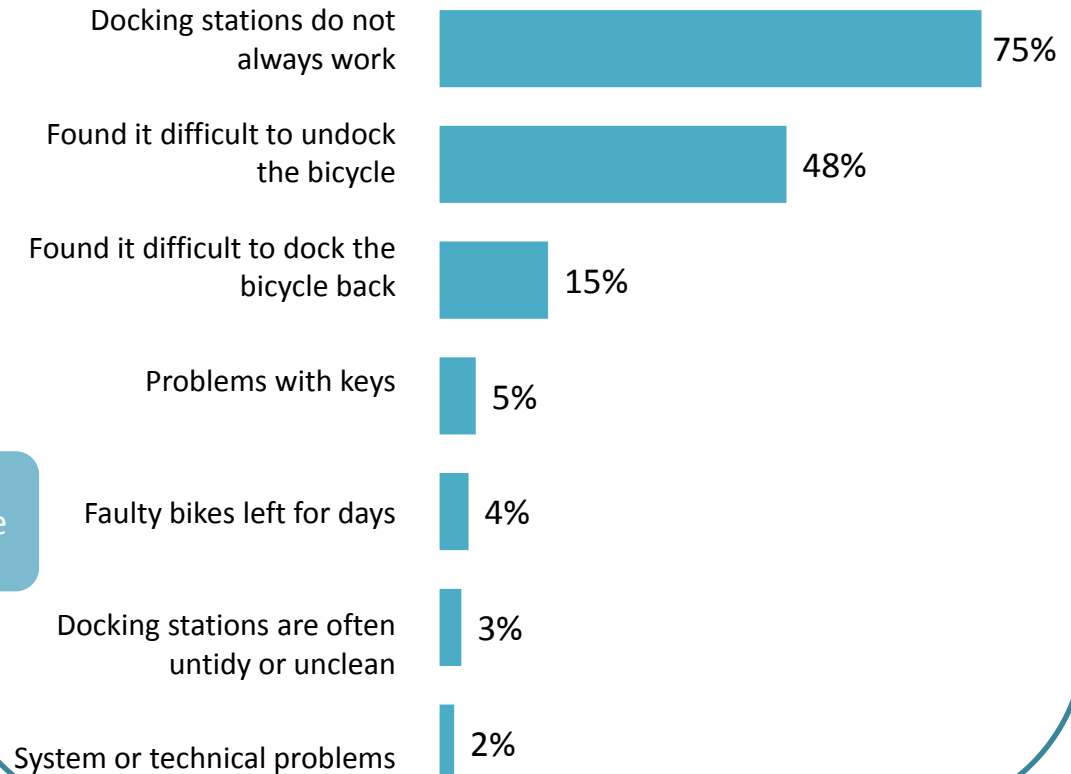
*Asked as "Availability of empty docking points to return bicycles" in wave 1

Not always working - main cause of members' dissatisfaction with general maintenance and working condition of docking stations³⁰

Q How satisfied are you with the working condition and general maintenance of the docking stations overall?



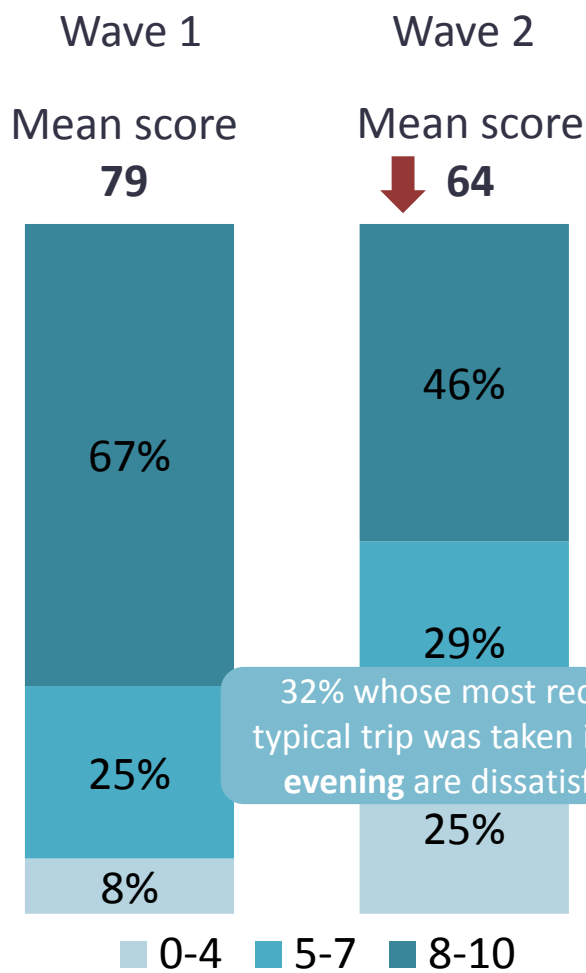
(Asked of 941 rating 0-6)
Q Why do you say you are not satisfied with the working conditions and general maintenance of the docking stations? (Mentions above 1%)



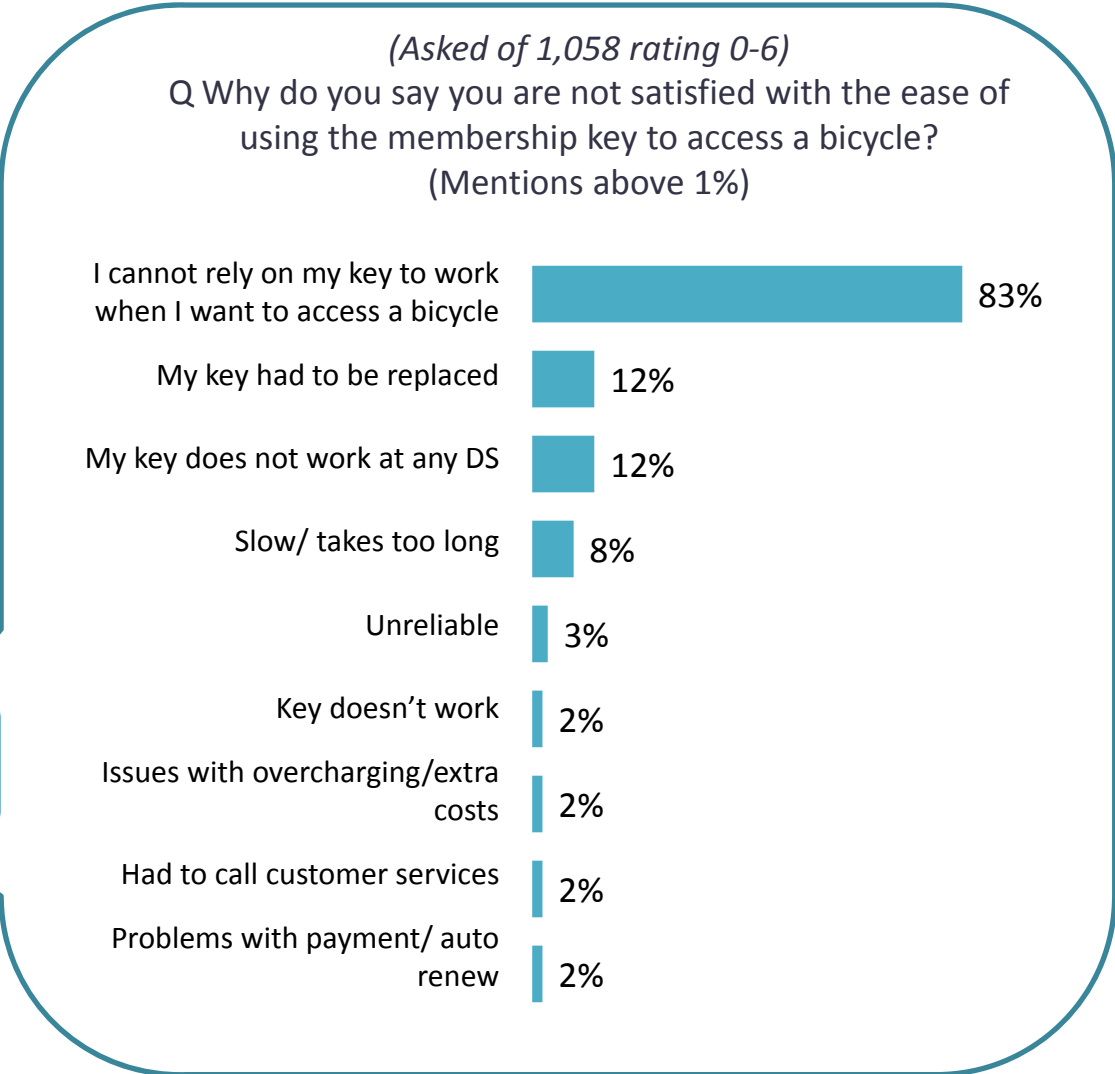
Base: All members: 2,652, all who are not satisfied with the working condition and general maintenance: 941

Under half now satisfied with ease of using the membership key; biggest drop in satisfaction across all touchpoints

Q And how satisfied are you with the ease of using the membership key to access a bicycle?



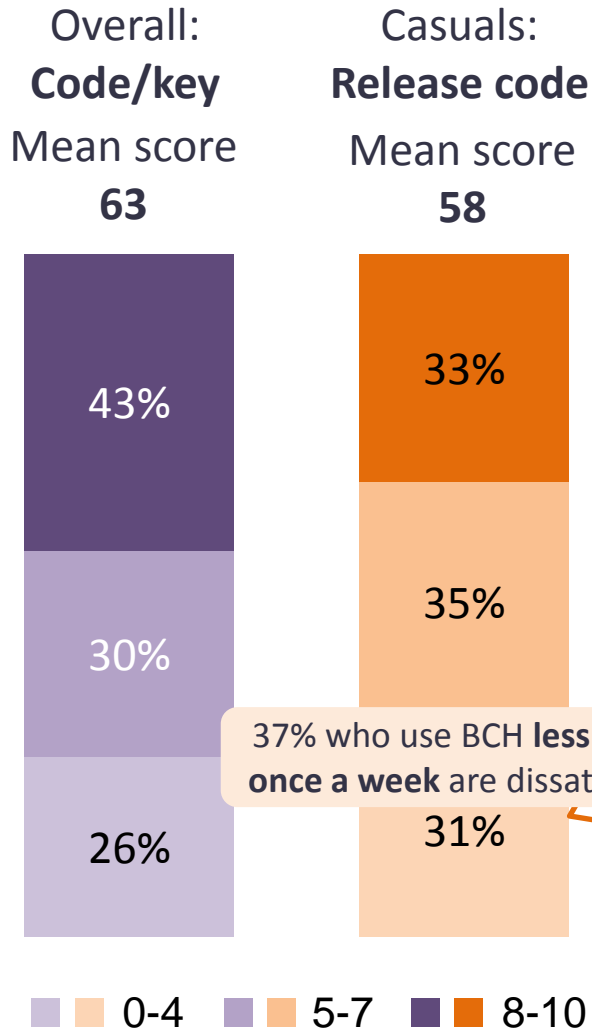
32% whose most recent typical trip was taken in the evening are dissatisfied



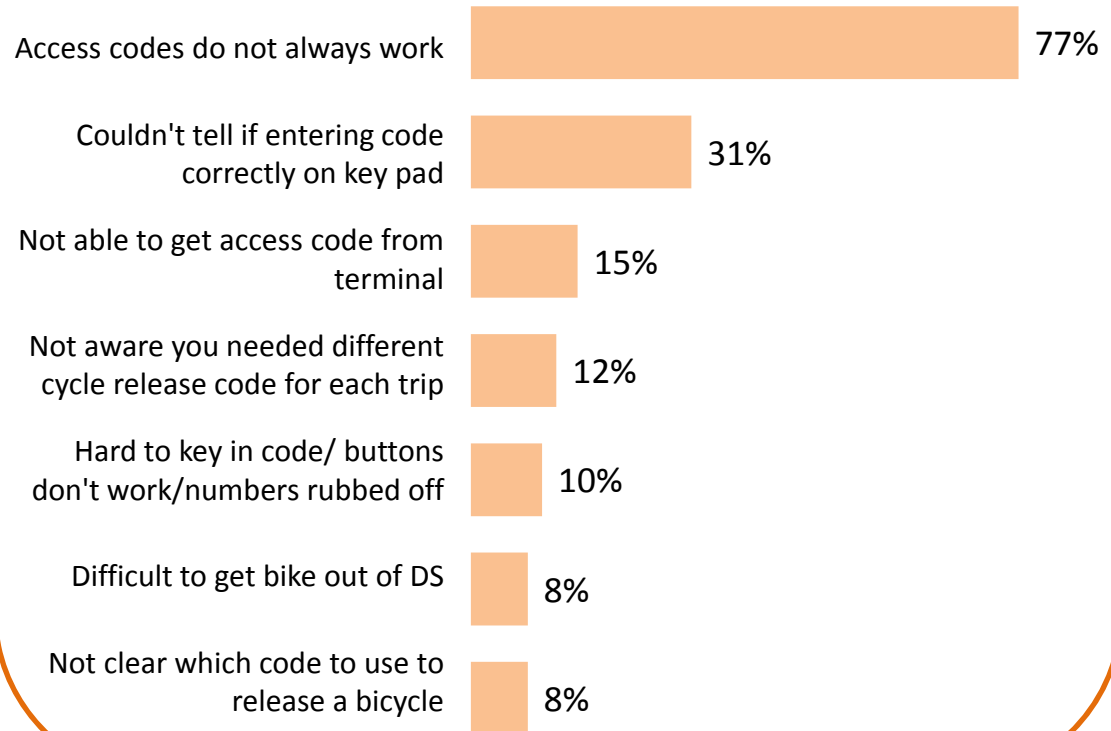
Base: All members: W1: 3,754, W2: 2,652:all who are not satisfied with the ease of using the membership key: W2: 1,058

Only a third of casuals satisfied with the ease of using the bicycle release code

Q How satisfied are you with the ease of using the membership key/bicycle release code to access a bicycle?

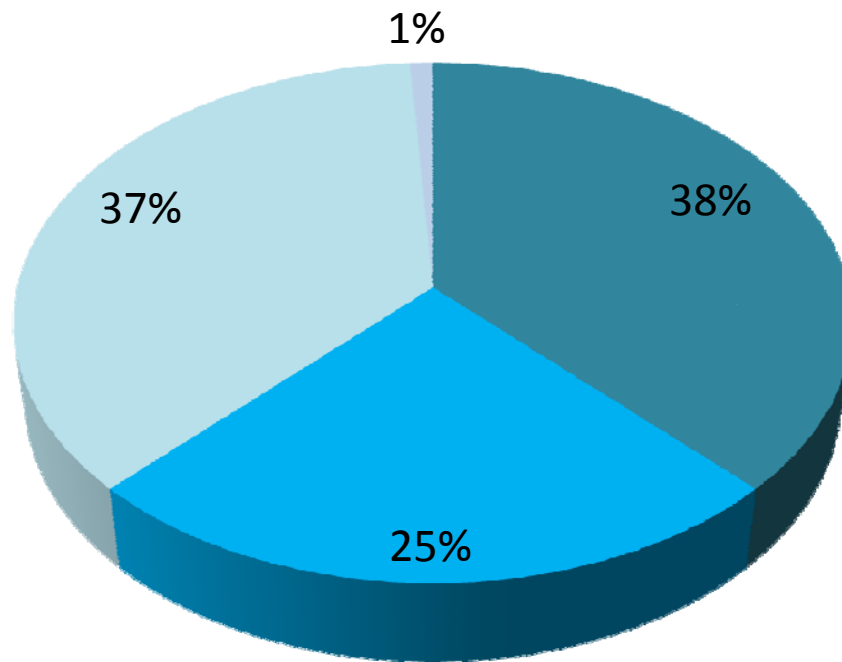


(Asked of 297 rating 0-6)
Q And why do you say you are not satisfied with the ease of using the bicycle release code to access a bicycle?
(Mentions above 2%)



Just under two-in-five members know how to get additional time when docking stations are full

Q 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?



■ Yes, and I know how to do this ■ Yes, but I don't know how to do this
■ No ■ Don't know

Base: All members: 2,652

43% who travel on
weekday mornings
know how to do this



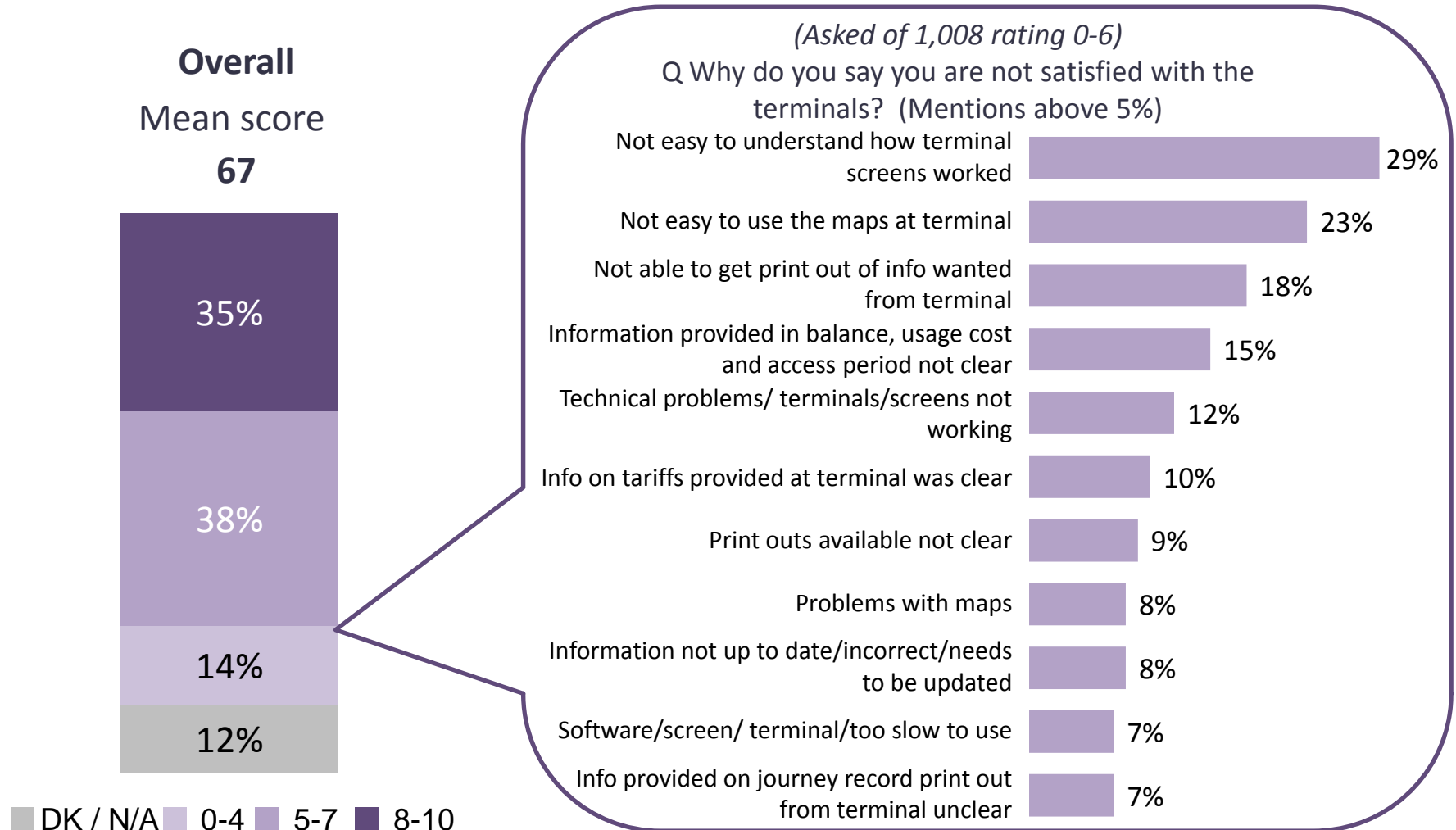
42% who travel on
weekday afternoons
know how to do this



44% who travel at least
once a week know how
to do this compared to
30% who travel less
often than once a week

Just over a third of all users are satisfied with the panels, print outs, screens and ease of use of the terminals

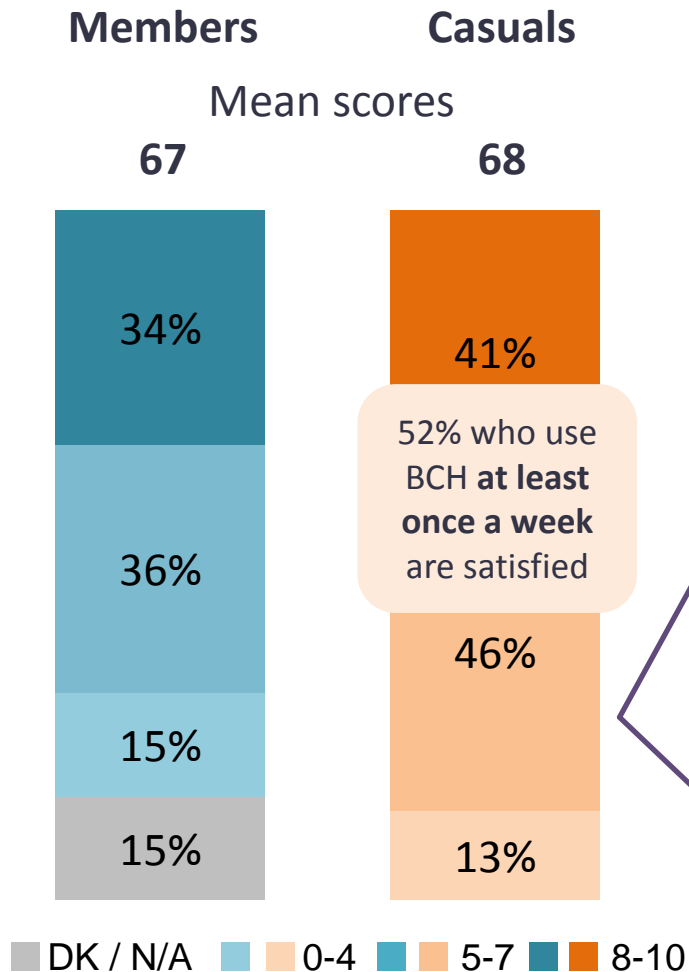
Q How satisfied are you with the information panels, print outs, screens and ease of using the terminals?



Base: All users: 3,317; all users who are not satisfied with the terminals: 1,008

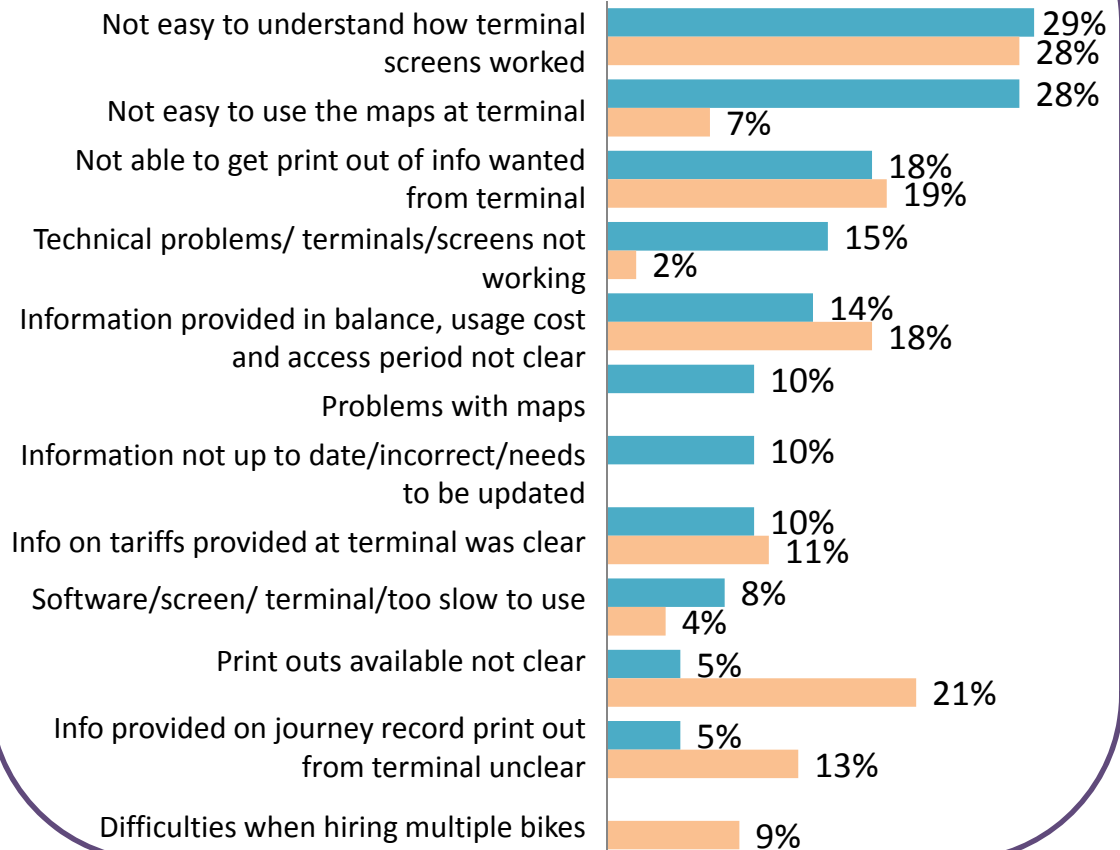
Casuals are more likely to cite problems with print outs as a reason for dissatisfaction with the terminals

Q How satisfied are you with the information panels, print outs, screens and ease of using the terminals?



(Asked of 863 members and 236 casuals rating 0-6)

Q Why do you say you are not satisfied with the terminals? (Top mentions)

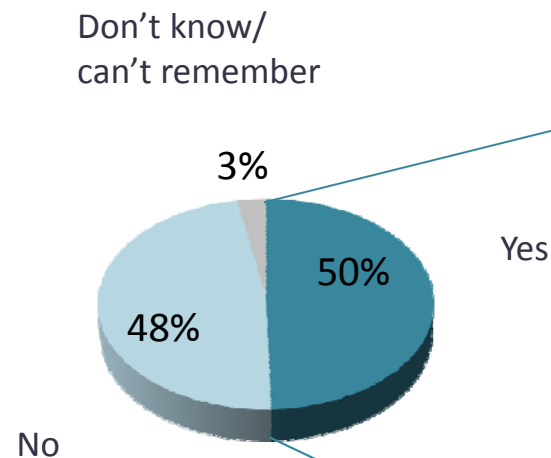


■ Members ■ Casuals

Base: All members 2,652; all casuals: 665; all users who are not satisfied with the terminals: members: 863; casuals: 236

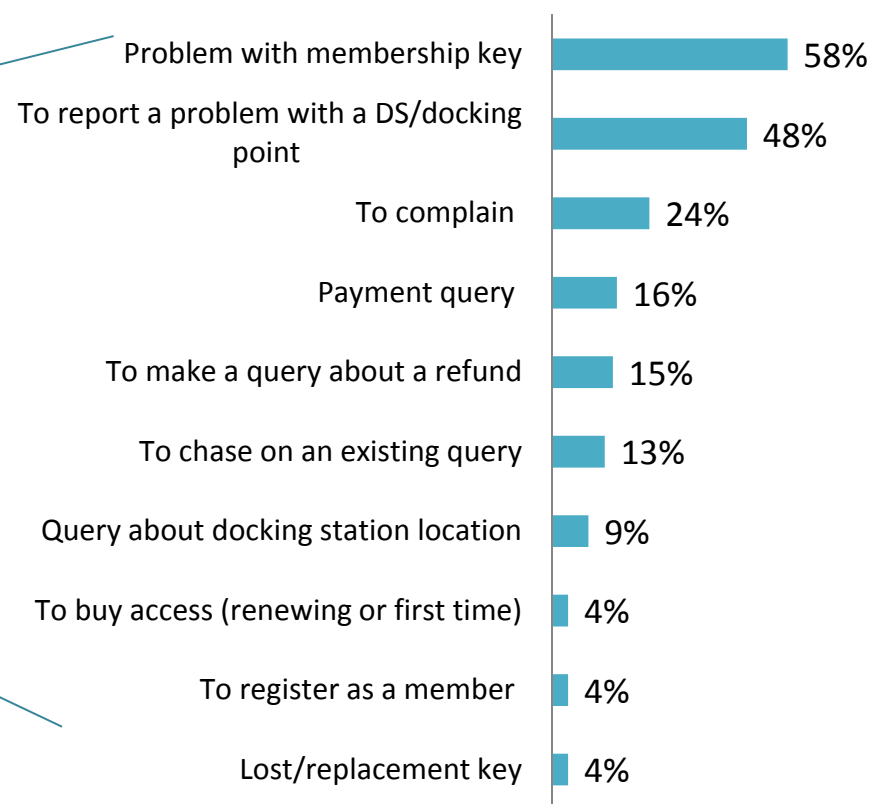
Half of members have contacted the BCH contact centre in the last two months

Q In the last 2 months have you contacted the Barclays Cycle Hire contact centre?



64% who use BCH less than once a week and contacted the contact centre did so because of a **problem with the membership key**

(Asked of 1,314 that contacted the centre in the last 2 months)
Q Thinking about the last time you contacted the centre, what was the reason or reasons? (Mentions above 3%)



Speed, ease, convenience and fun all key reasons for positive experience

Q Thinking about your experience of using Barclays Cycle Hire what was particularly good about your experience?

I love the convenience of Barclays bikes - it's made trips that can be quite long on bus / tube much, much faster - thank you!

- 12% - faster
- 8% - convenient

It's fun, and sociable if done with friends, seeing bits of London I wouldn't normally see, faster than walking and MUCH nicer than the tube

- 9% - enjoyable, it's fun
- 9% - best way to get around London
- 8% - alternative public transport

Very quick to unlock or return a bike - infinitely better than taking escalators to tube station or waiting for bus. [...]

- 10% - easy to use

Q Why do you say that?

When the weather is good it is a fun, healthier and most of the times quicker way to get around

- 15% - enjoyable, it's fun

Whenever I need to travel through London, cycling will be cheaper, faster, and more comfortable than any alternative form of transport!

- 14% - convenient
- 8% - cheaper
- 7% - best way to get around London
- 7% - effective service

The weather was good and the ride around Hyde Park

- 15% - being outside/ enjoying the weather

Whenever I need to travel through London, cycling will be cheaper, faster, and more comfortable than any alternative form of transport!

- 15% - easy to use
- 14% - cheap

It's a different experience to enjoy London on a bicycle.

- 14% - best way to get around London
- 13% - enjoyable, it's fun

Casuals more likely to see “fun” as an end in itself. **Members** more likely to use BCH for other reasons (eg commuting) but see BCH as more fun than the alternatives.

Convenience, availability and technical issues main reasons for bad experiences

Q Thinking about your experience of using Barclays Cycle Hire what was particularly bad about your experience?

Bikes are very heavy, gears are inappropriate, keys sometime fail, docking points are VERY rarely available at my destination, and going to an alternative would take me too far from work to be convenient.

- 42% - convenience
- 34% - availability
- 19% - bicycles

Being charged for hiring a bike when my key didn't work and still not getting refunded. [...]

- 9% - cost

There is no map available to show the different docking stations in London

- 33% - convenience
- 9% - availability

The gears are not good

- 15% - bicycles

The release codes are difficult to access sometimes

- 13% - technical issues

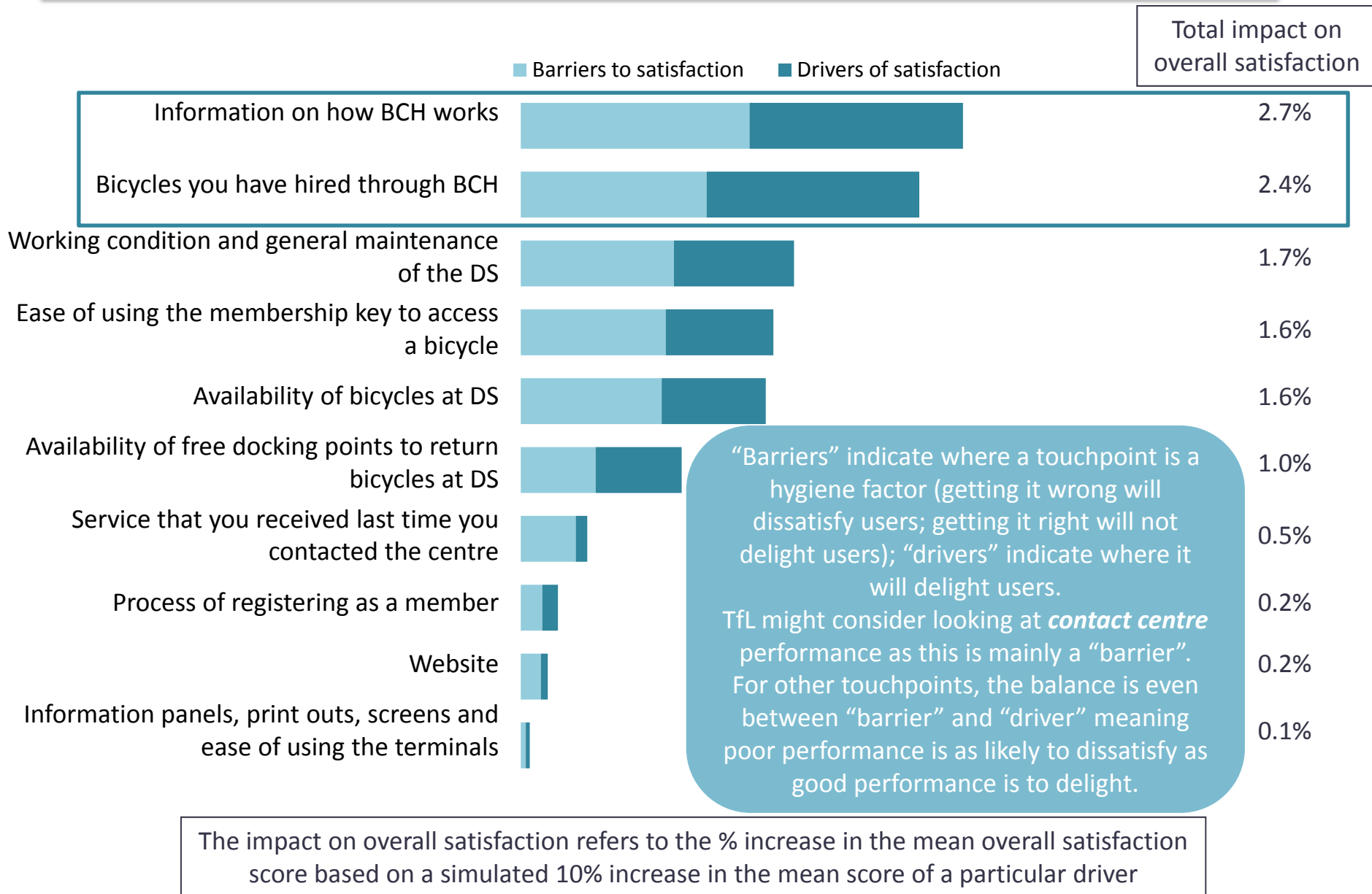
Q Why do you say that?

Lack of cycles available at peak times near Euston. When cycles are available system is let down by not working. System must be reliable for people to be able to trust the transport for regular commutes

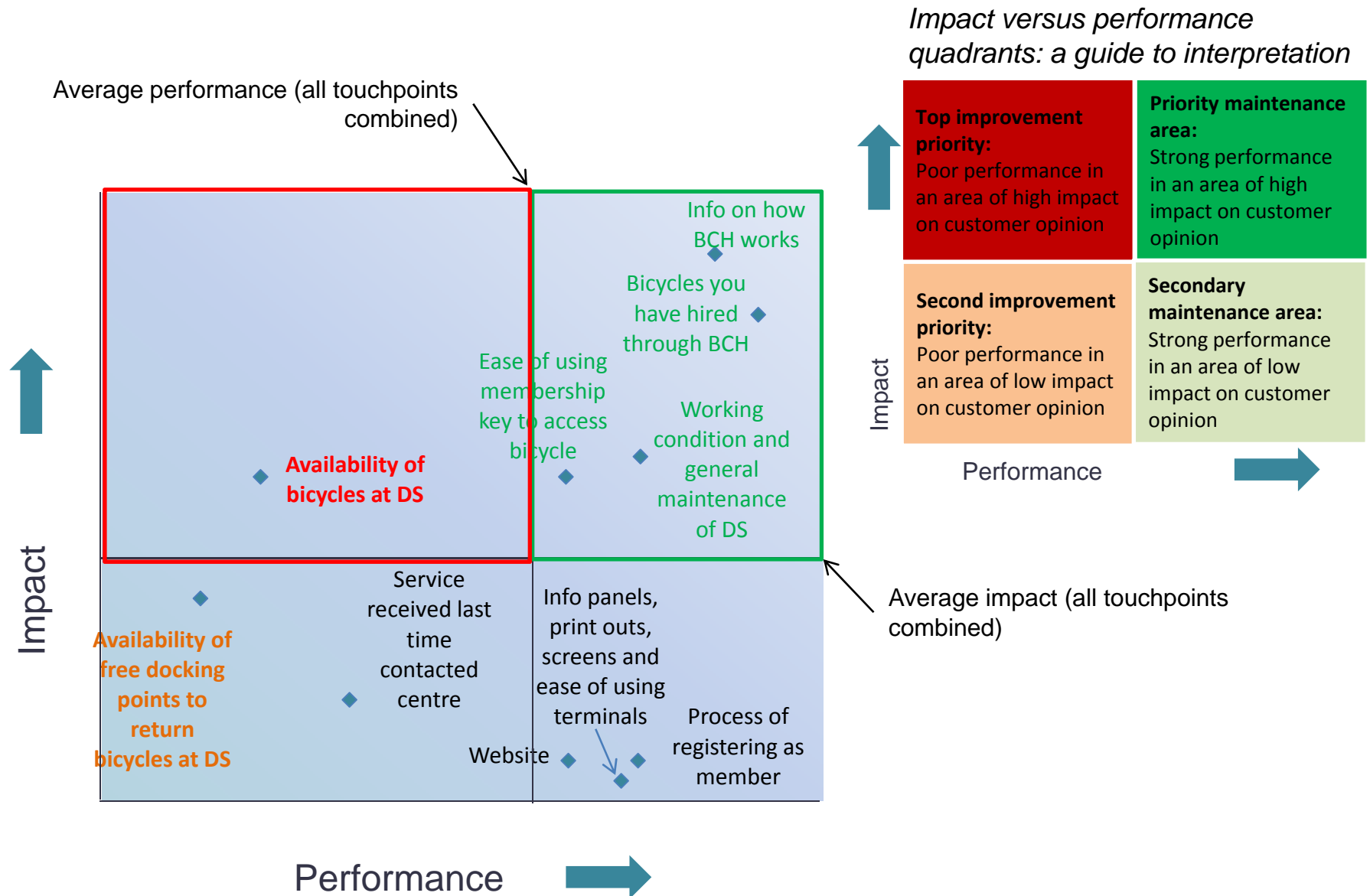
- 3% poor availability of bicycles
- 2% - poor availability of spaces at DS
- 2% - unreliable
- 2% - keys do not work

7. Drivers of satisfaction

Information on how BCH works and the bicycles themselves have biggest impact on members' overall satisfaction



Availability of bicycles at DS is the main priority area for improvement for members; availability of free docking points a close second

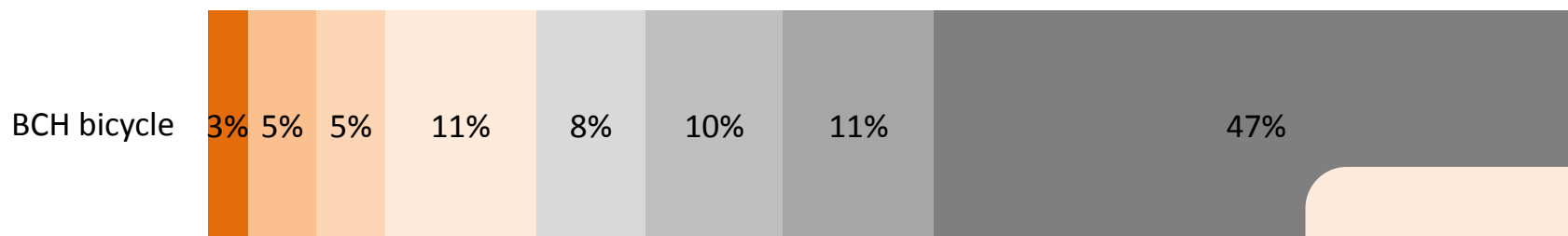


8. Appendix

Almost half of casuals are first time users

Q How often do you use the Barclays Cycle Hire scheme?

- 5 or more days a week
- 3-4 days a week
- 2 days a week
- Once a week
- Once a fortnight
- Once a month
- Less than once a month
- First time



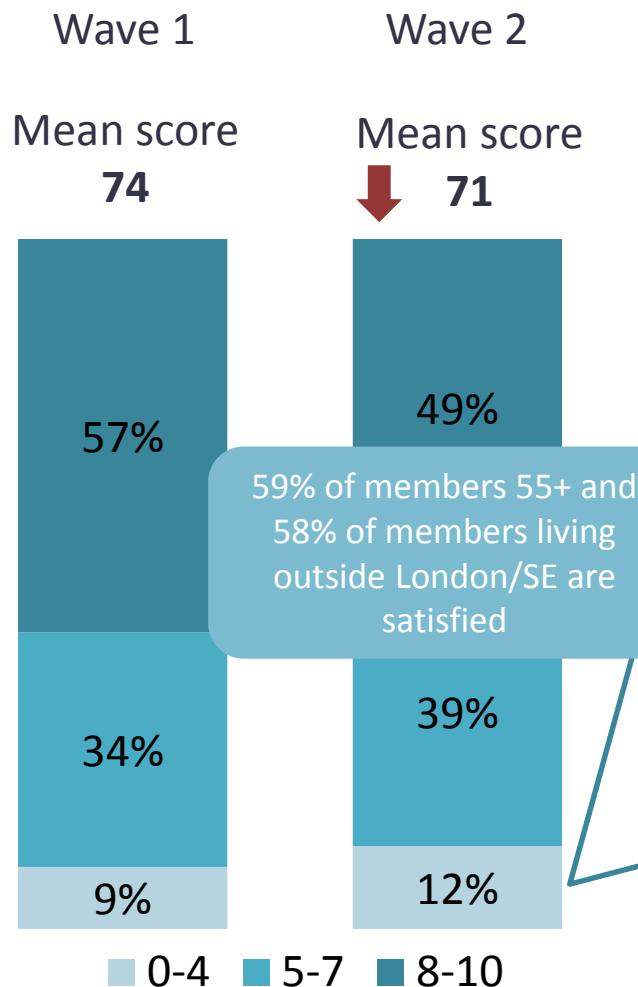
61% of **women** were using BCH for the first time



Base: All casuals: 665

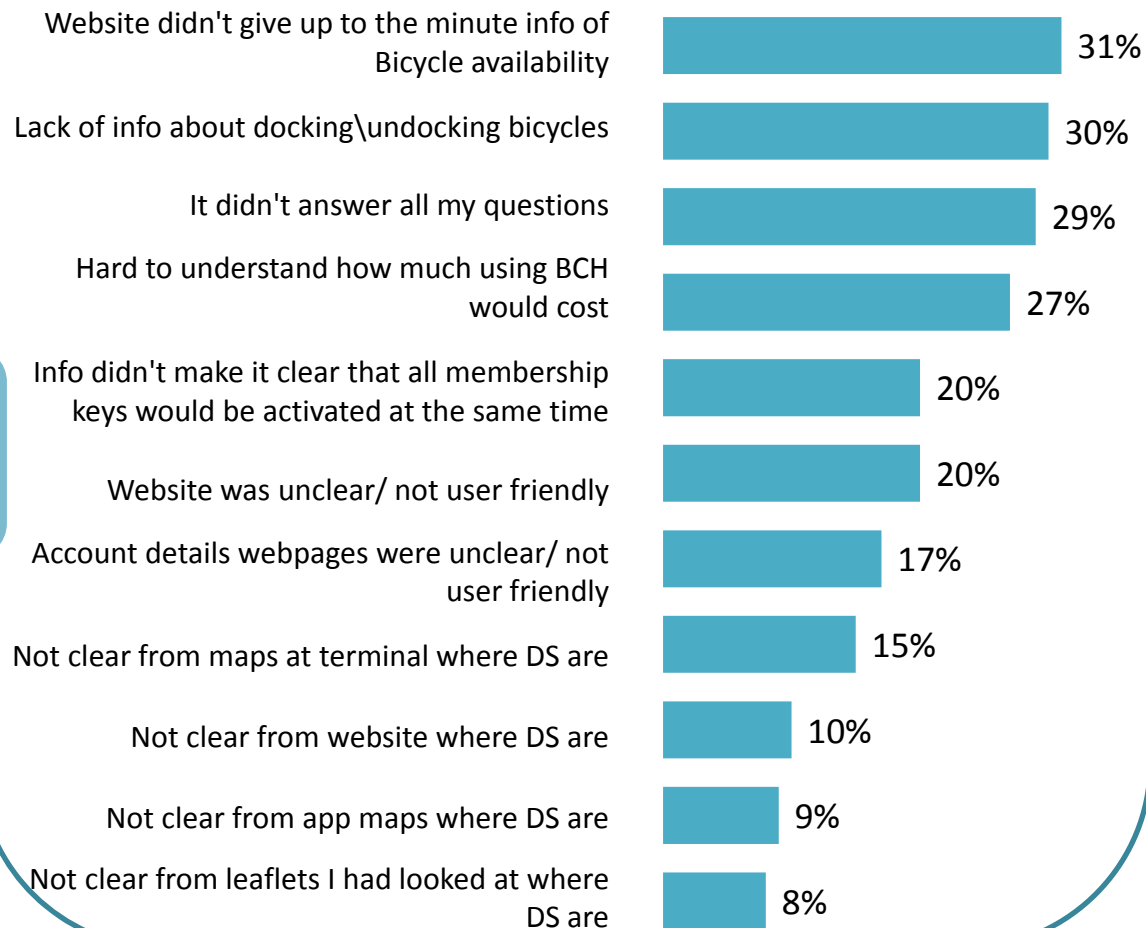
Decreasing satisfaction about information on how BCH works

Q How satisfied are you with the information on how Barclays Cycle Hire works?



(Asked of 799 rating 0-6)

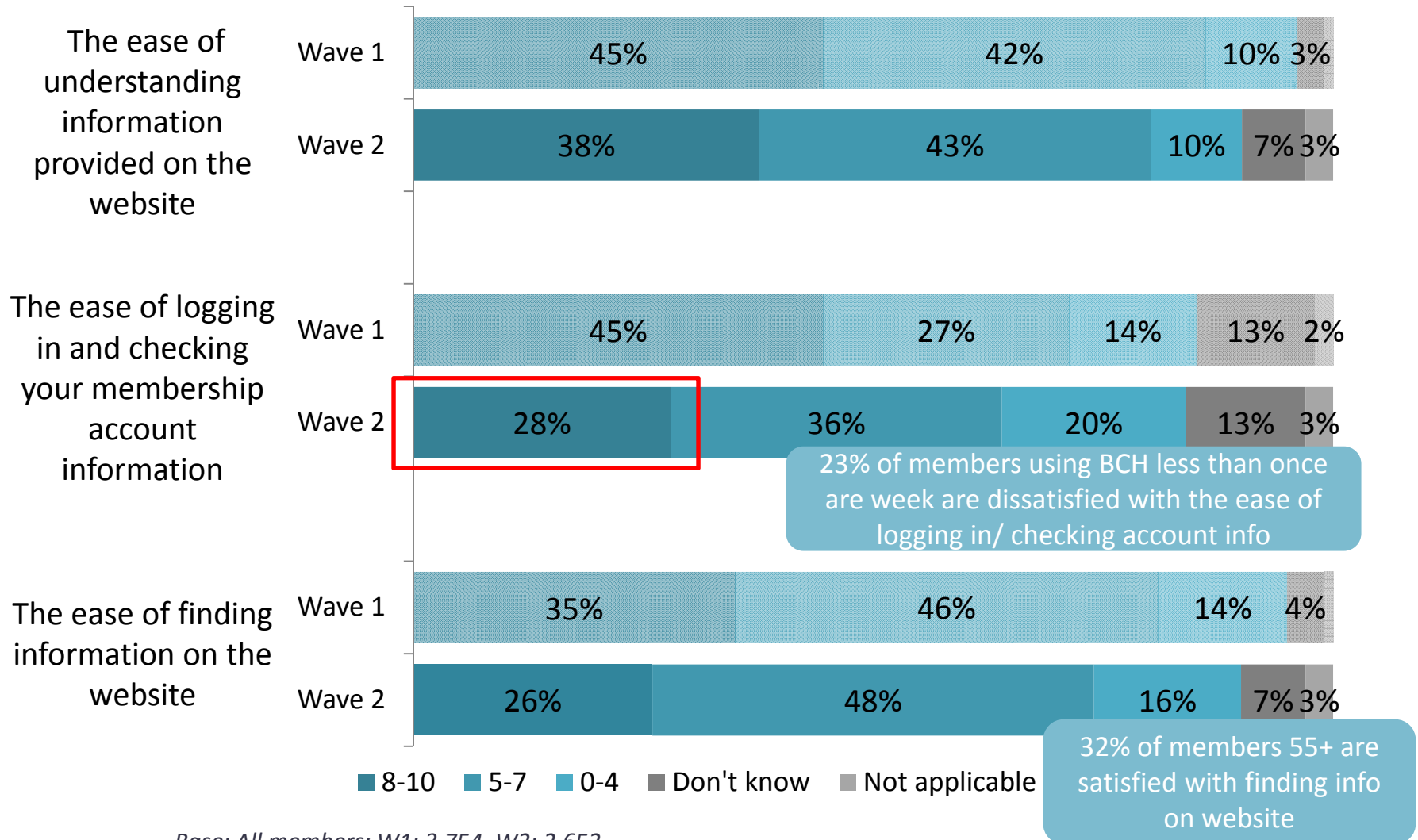
Q Why do you say you are not satisfied with the information you have obtained or received on BCH? (Mentions above 5%)



Base: All members: W1: 3,754, W2: 2,652, all who are not satisfied with the information on how BCH works: W2: 799

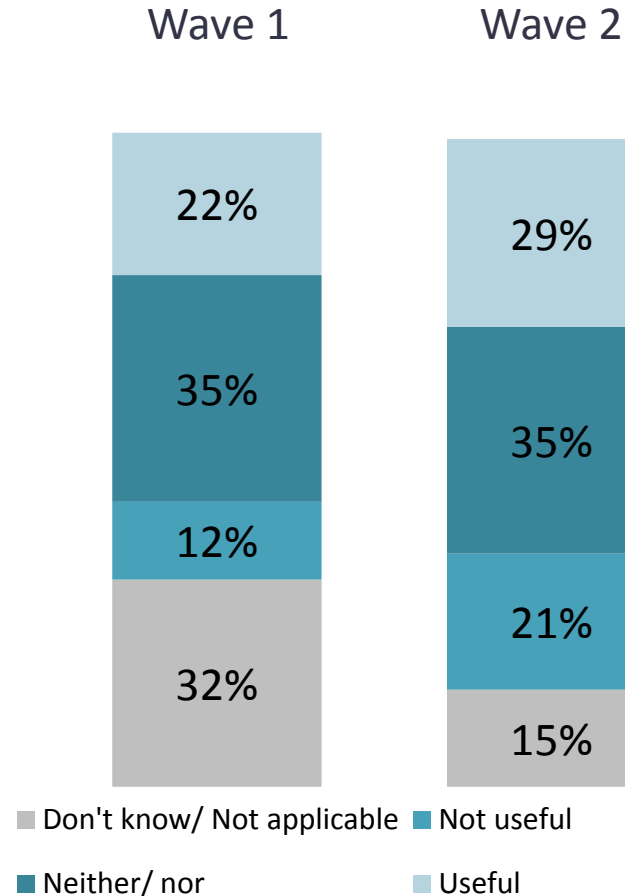
Website less well rated – particularly for checking membership account information

Q Thinking specifically about the Barclays Cycle Hire website, how satisfied are you with ...?

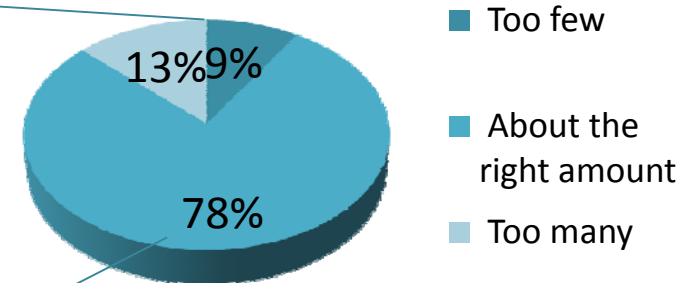


More members find emails useful; and majority say they receive about the right amount

Q How useful is the information contained in the emails you receive from Barclays Cycle Hire?



Q And still thinking about the number of emails that you receive about Barclays Cycle Hire, are there?

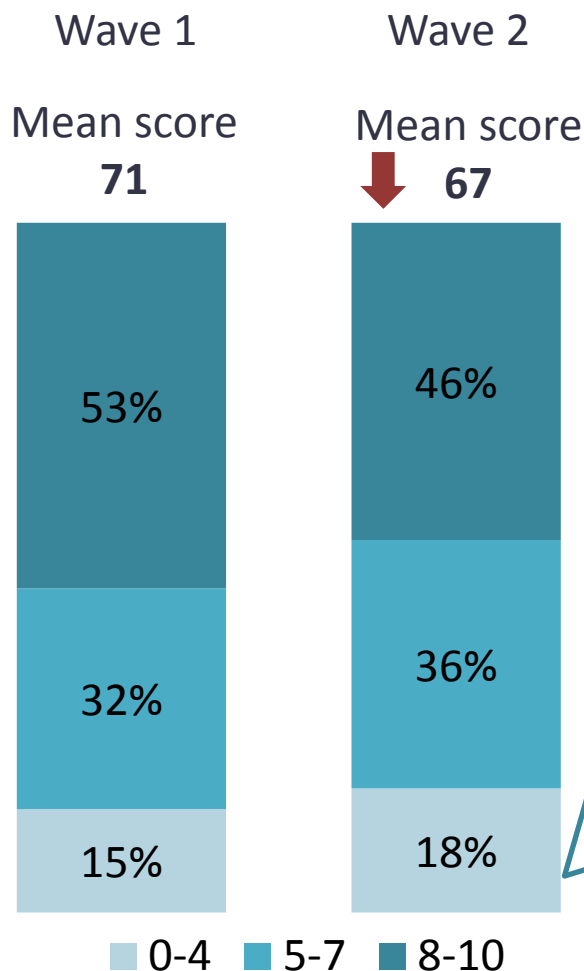


55+ more likely to find the **info in the emails useful** (38%)

16% of members using BCH **less than once a week** say they receive **too many** emails

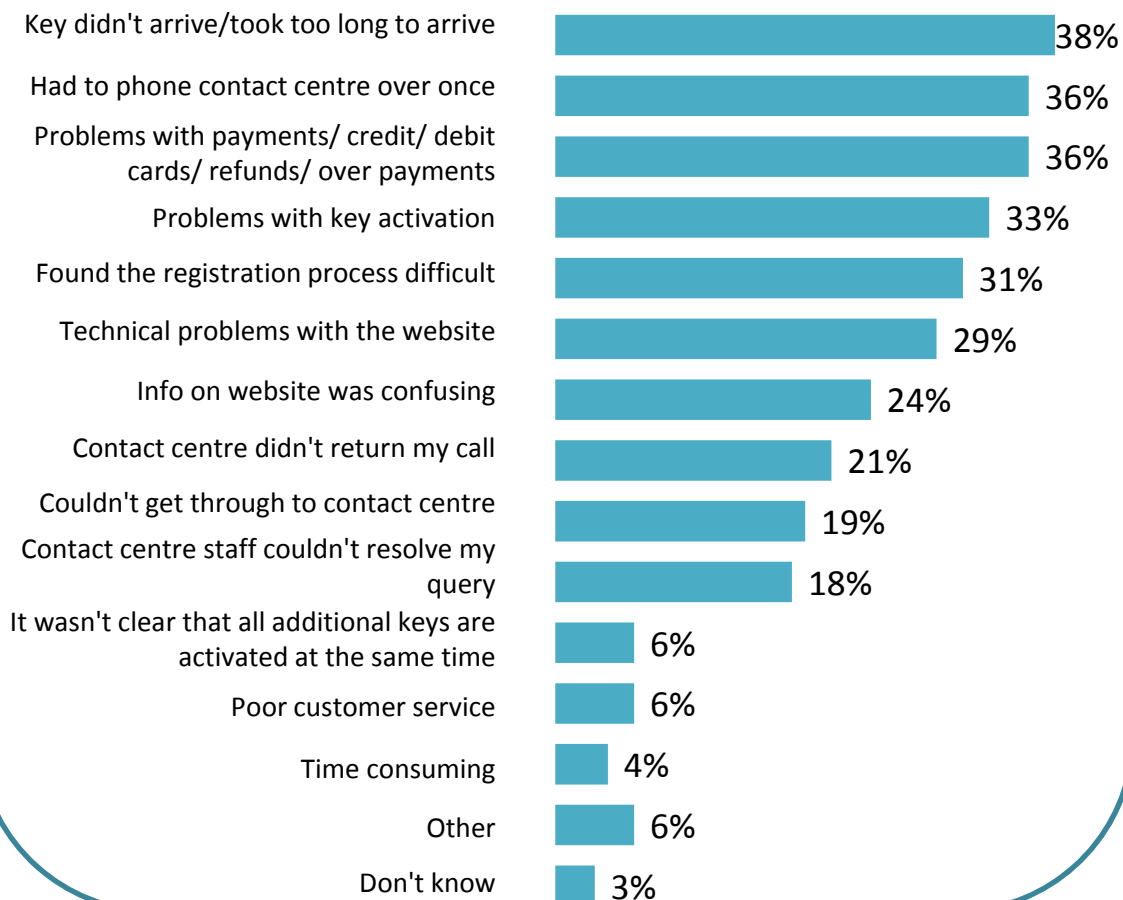
Satisfaction with registering is decreasing

Q How satisfied are you with the process of registering as a member overall?



(Asked of 72 rating 0-6)

Q why do you say you are not satisfied with the registration process?

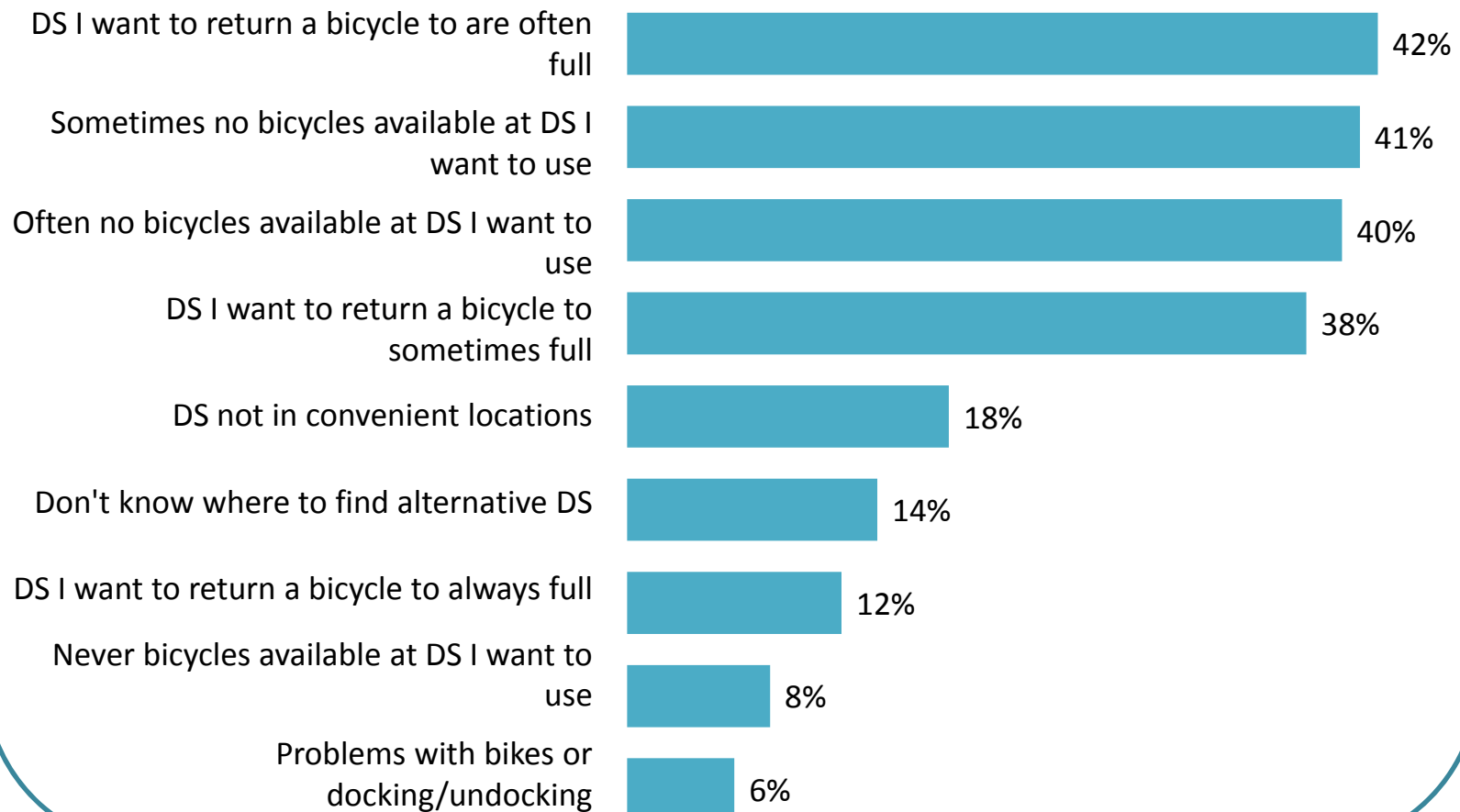


Base: W1: all members: 3,754, W2: All members who have registered in the last 4 months: 233, W2: all who are not satisfied with the registration process: 72

Reasons for dissatisfaction are due to lack of availability of bicycles and docking points

(asked of 2,089 who rated either bicycle or space availability 0-6)

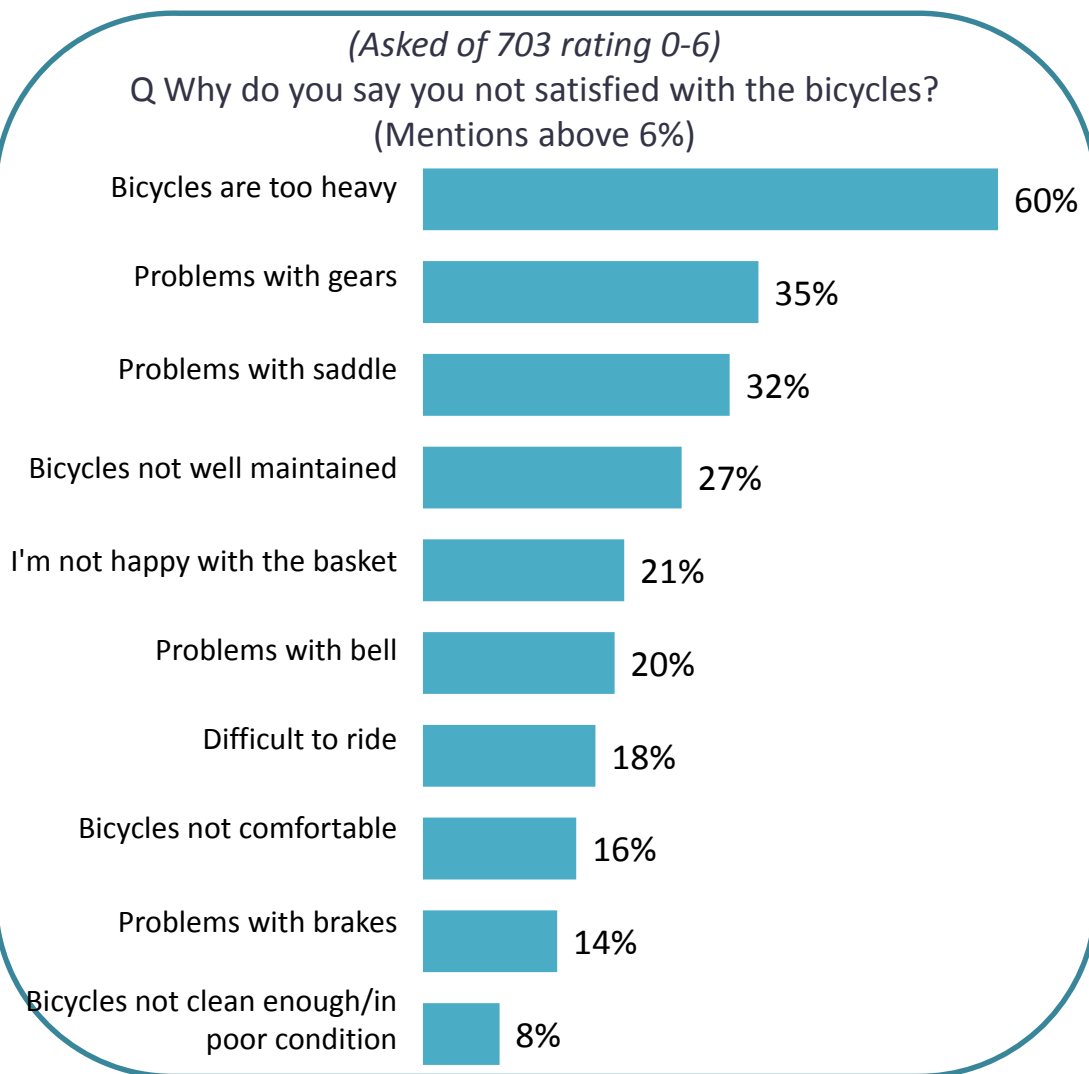
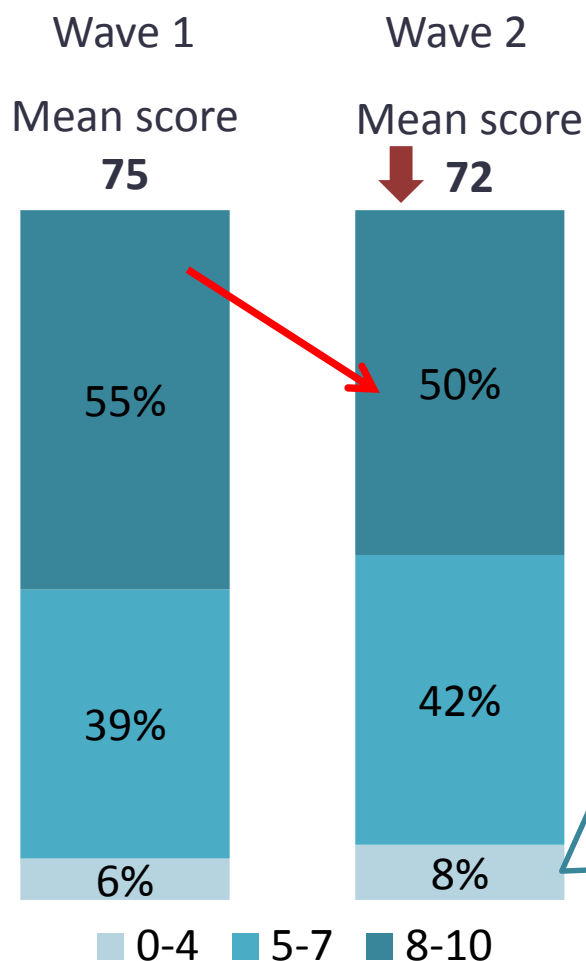
Q Why do you say you are not satisfied with availability at the docking stations? (Mentions above 5%)



Base: All who are not satisfied with the availability of free docking points and/or availability of bicycles: 2,089

Decreasing satisfaction: half now satisfied with BCH bicycles

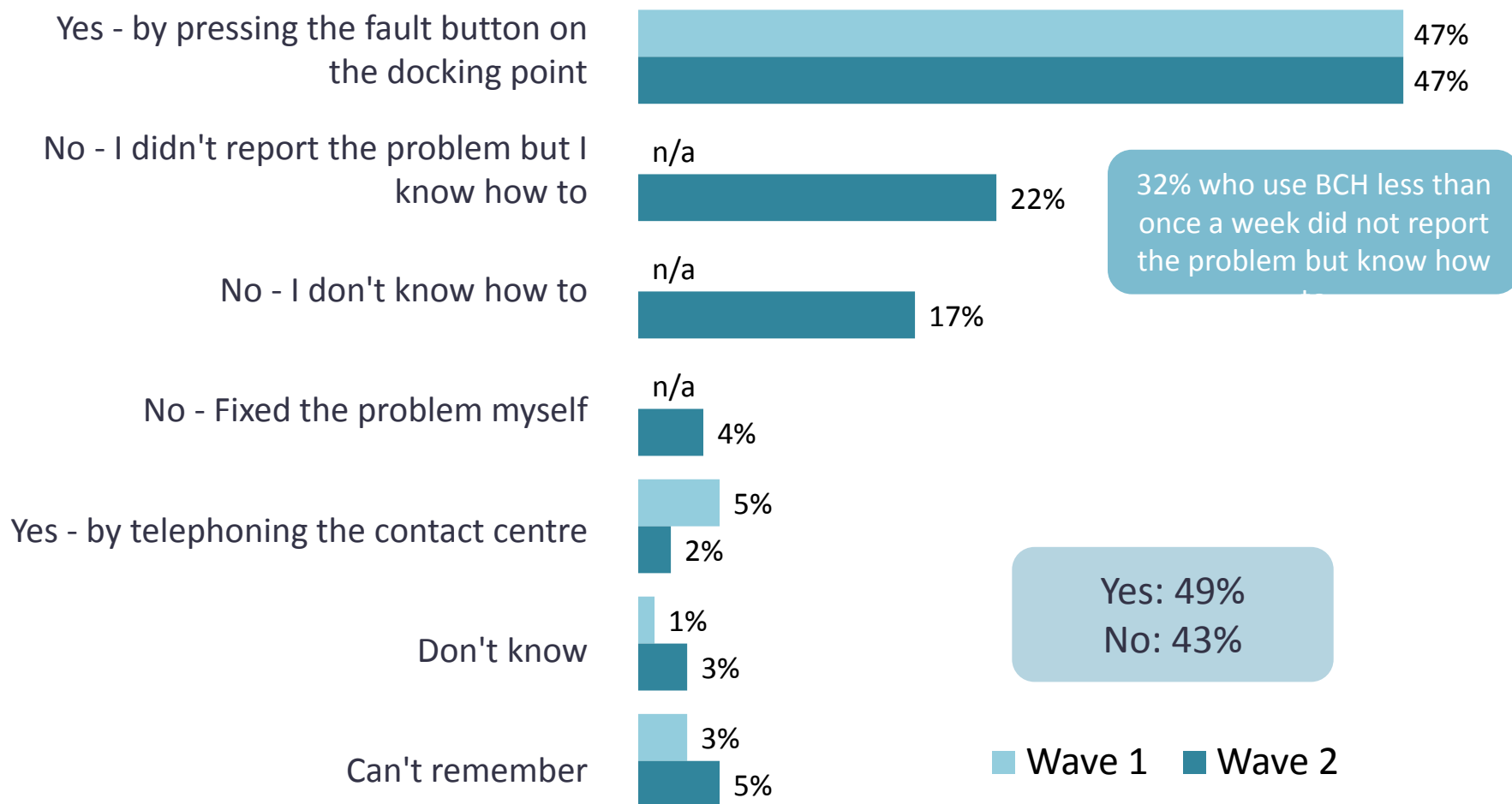
Q In general how satisfied are you with the bicycles you have hired through Barclays Cycle Hire?



Base: All members: W1: 3,754, W2: 2,652: all who are not satisfied with the bicycles: W2: 703

Just under half report problems by pressing the fault button on the docking point

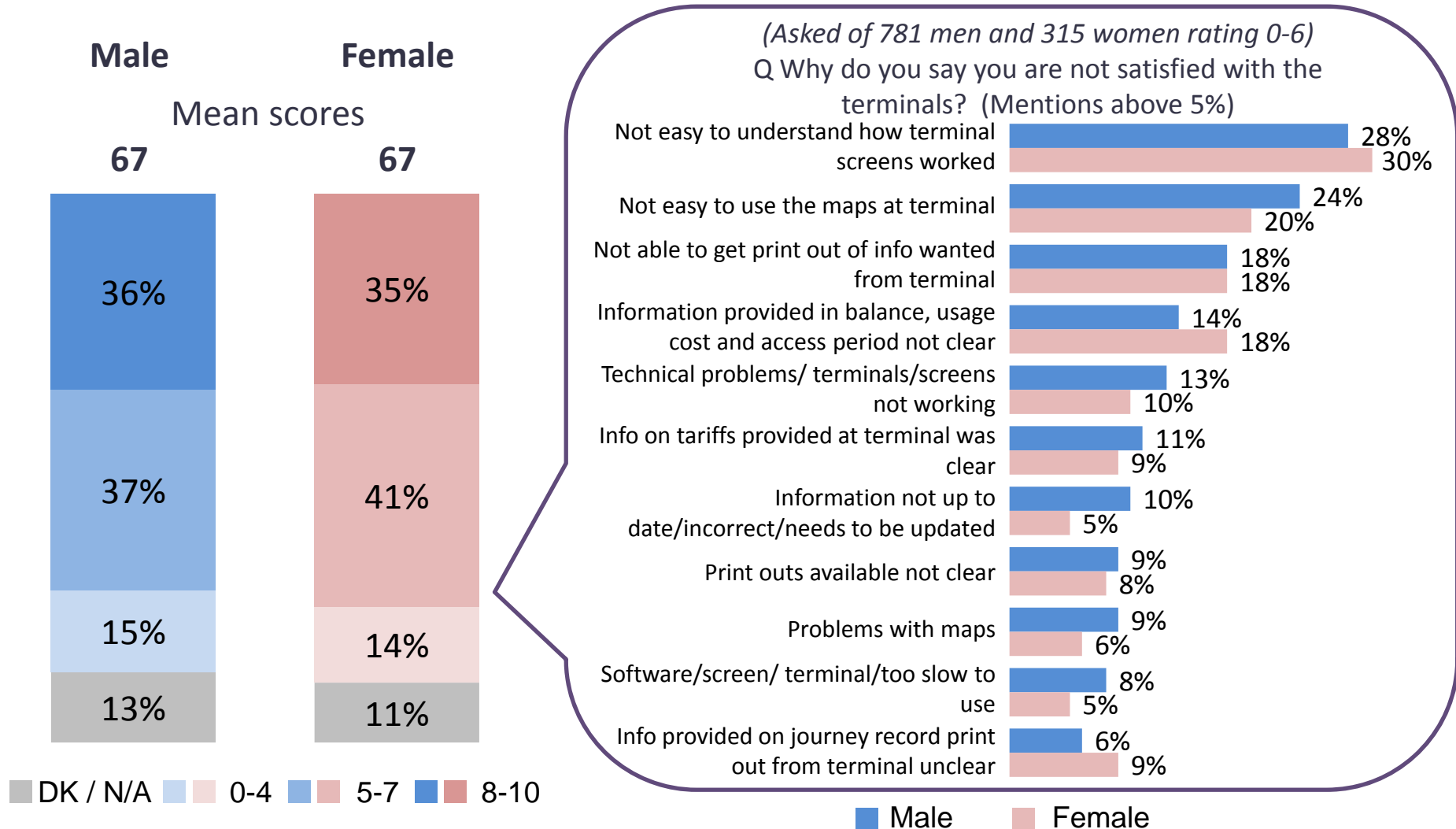
Q Did you report the problems with the bicycle that you used?



Base: All who had problems with bicycles: W1: 1,059, W2: 456

Satisfaction with the panels, print outs, screens and ease of use of the terminals is broadly similar for men and women

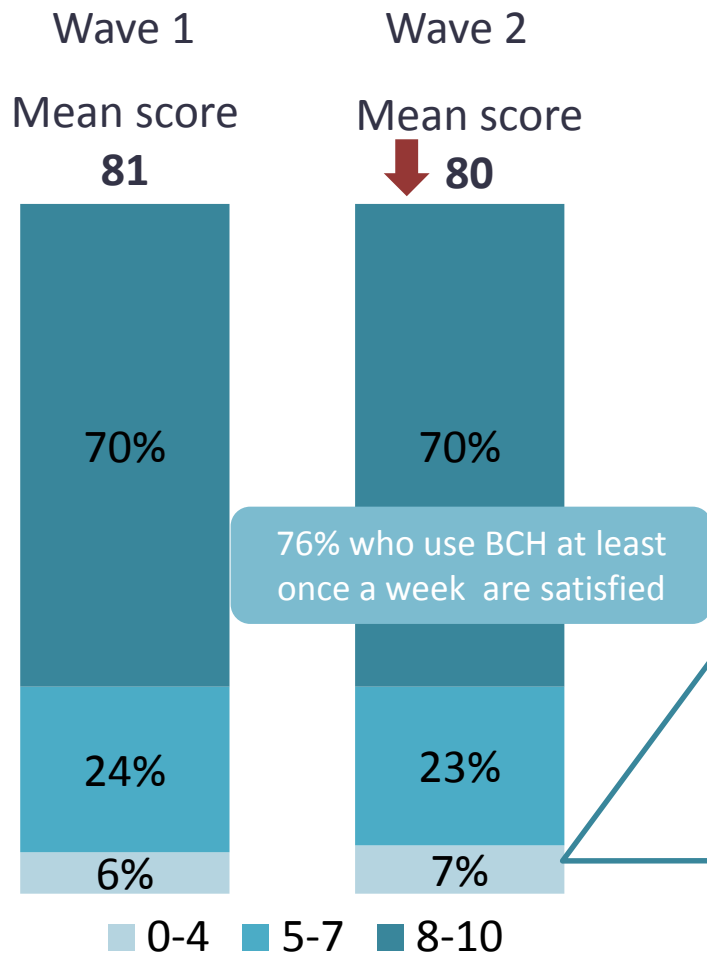
Q How satisfied are you with the information panels, print outs, screens and ease of using the terminals?



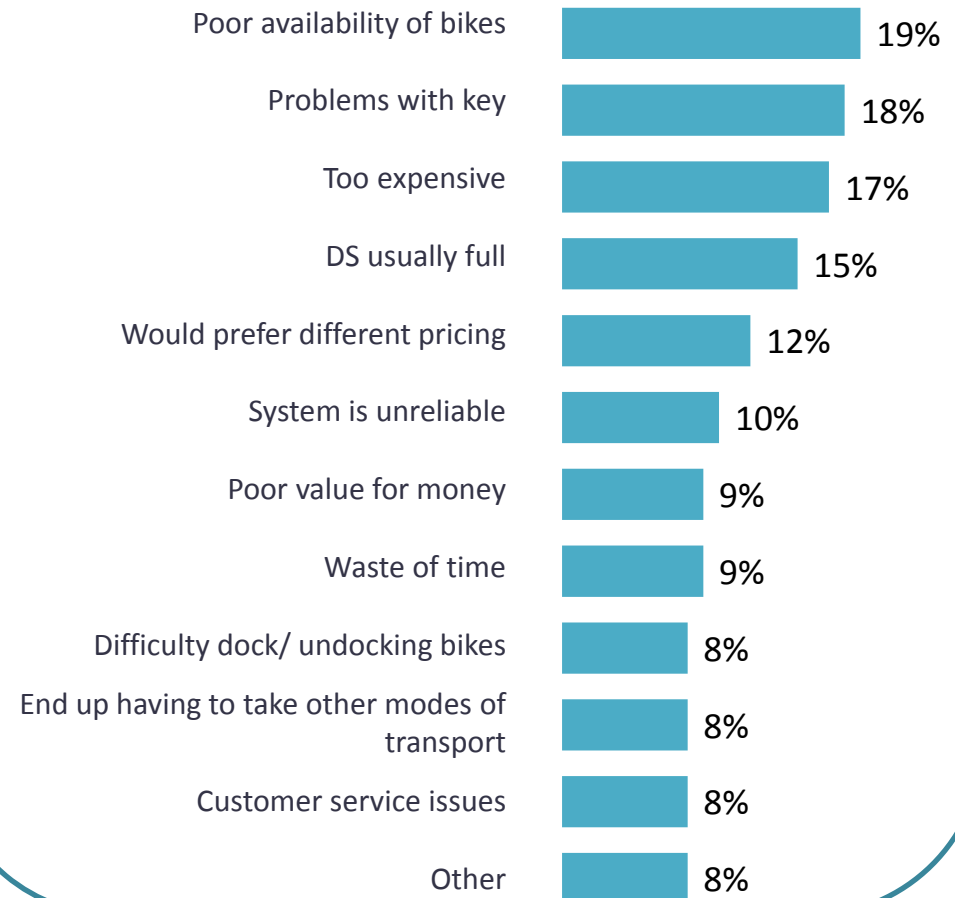
Base: All males 2,425; all females: 879; all users who are not satisfied with the terminals: males: 781; females: 315

Value for money mean score remains higher than for other TfL modes; closest are River Services: 78, DLR: 73 and Overground: 68

Q How satisfied are you with the value for money to you of using Barclays Cycle Hire?



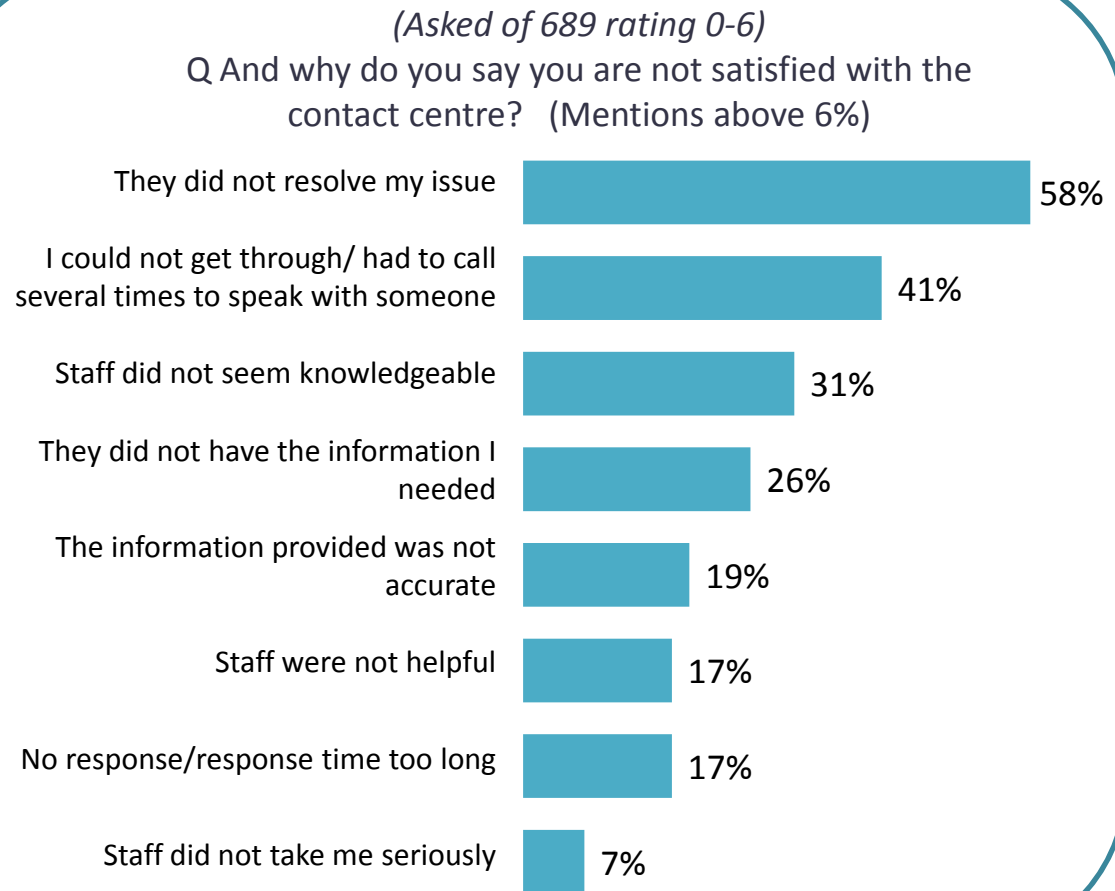
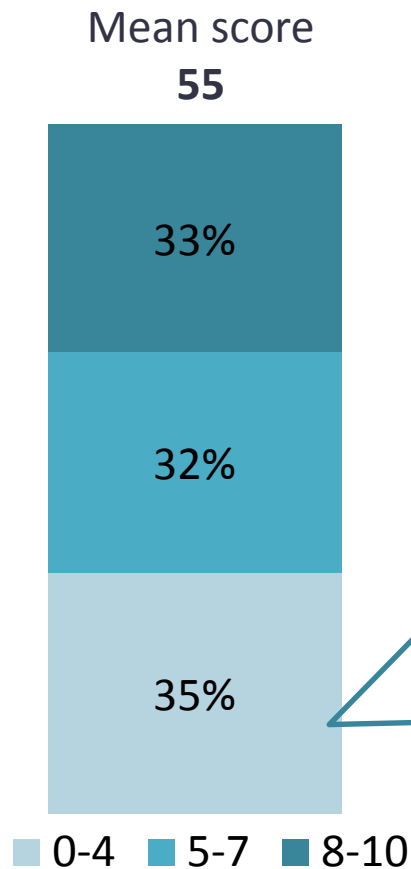
(Asked of 449 who rated 0-6)
Q Why do you say you are not satisfied with the value for money of Barclays Cycle Hire? (Mentions above 7%)



Base: All members: W1: 3,754, W2: 2,652; all who are not satisfied with the value for money of BCH: W2: 449

A third are satisfied with the service received from the contact centre; about a third are not

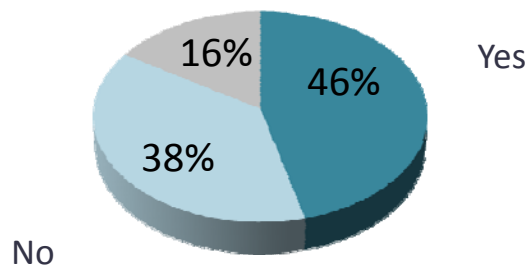
Q And still thinking about the last time you contacted the centre how satisfied were you with the service that you received?



Fewer members have their query resolved first time

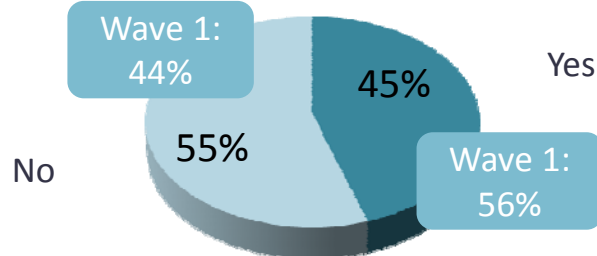
Q Has your query been resolved now?

Don't know



Q Was your query resolved the first time you contacted the centre?

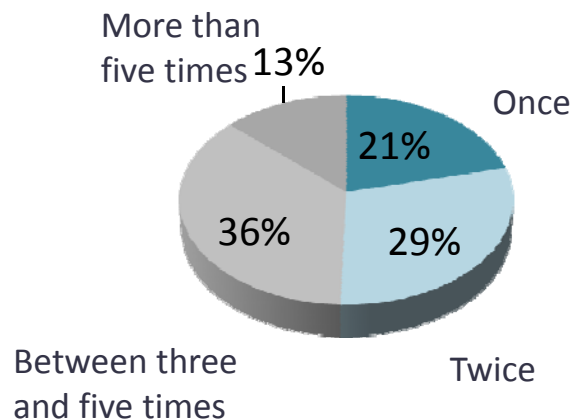
Wave 1:
44%



Q How many times have you had to contact the centre to resolve your query?

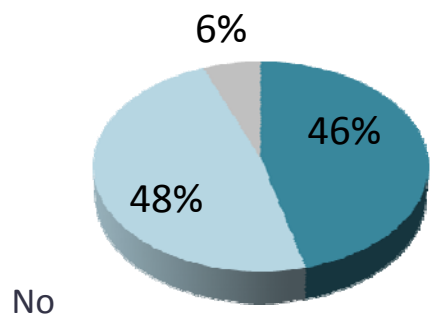
More than five times

Once



Q Did you request a call back from the contact centre?

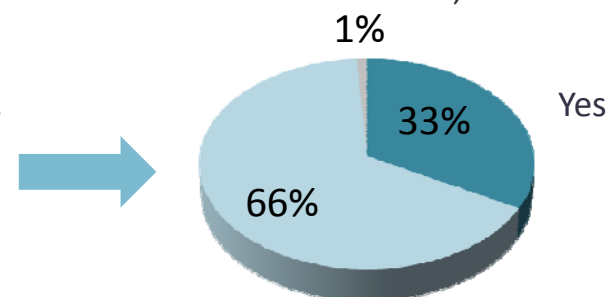
Don't know



Q Did you receive a call back from the contact centre?

No, not needed

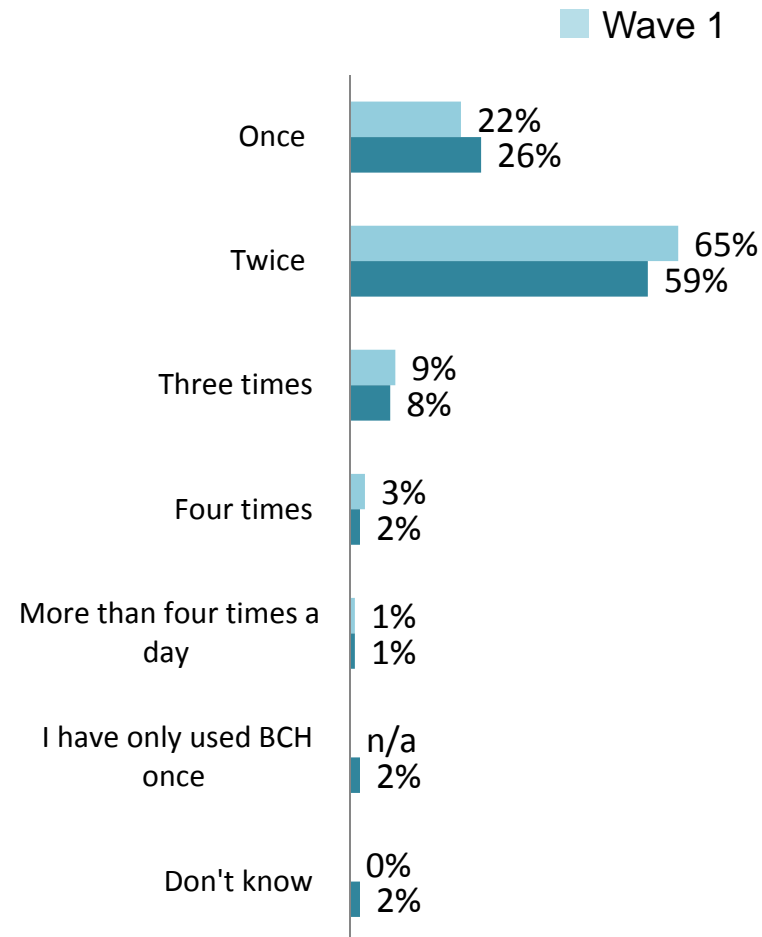
Yes



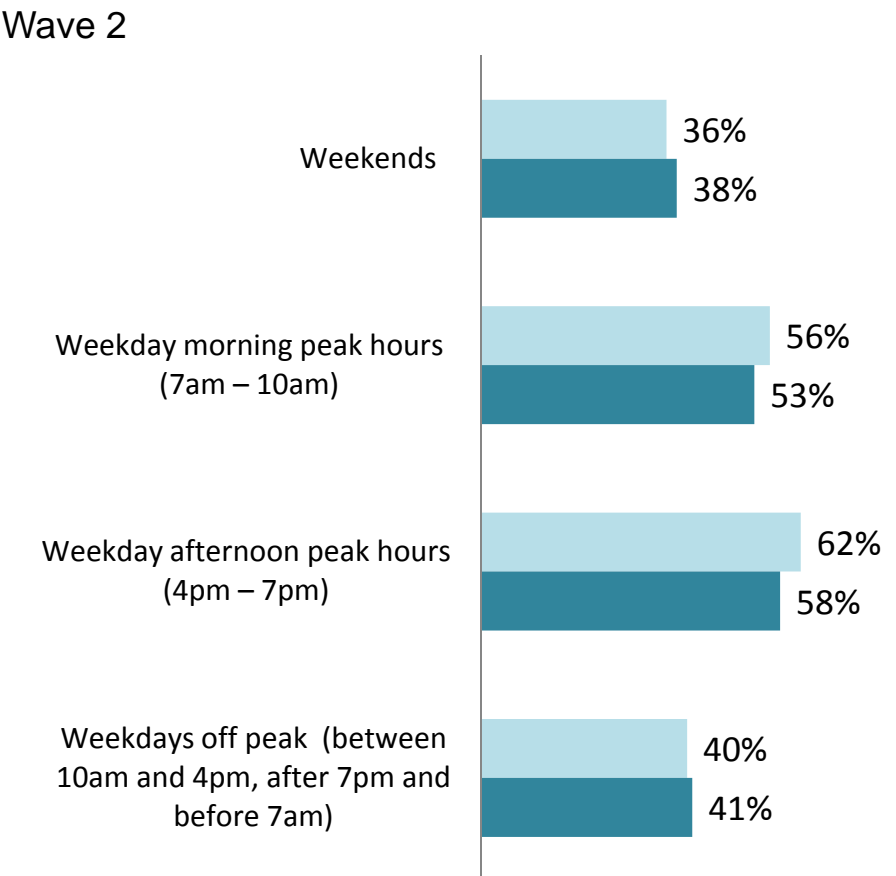
Base: All members who have contacted the contact centre: 1,314; all who requested a call back: 721; all who received a call back: 335

Most hire a Barclays Bike twice in a day; most use the bikes during peak morning and evening hours

Q On days when you use Barclays Cycle Hire, how many times do you generally hire a bicycle?



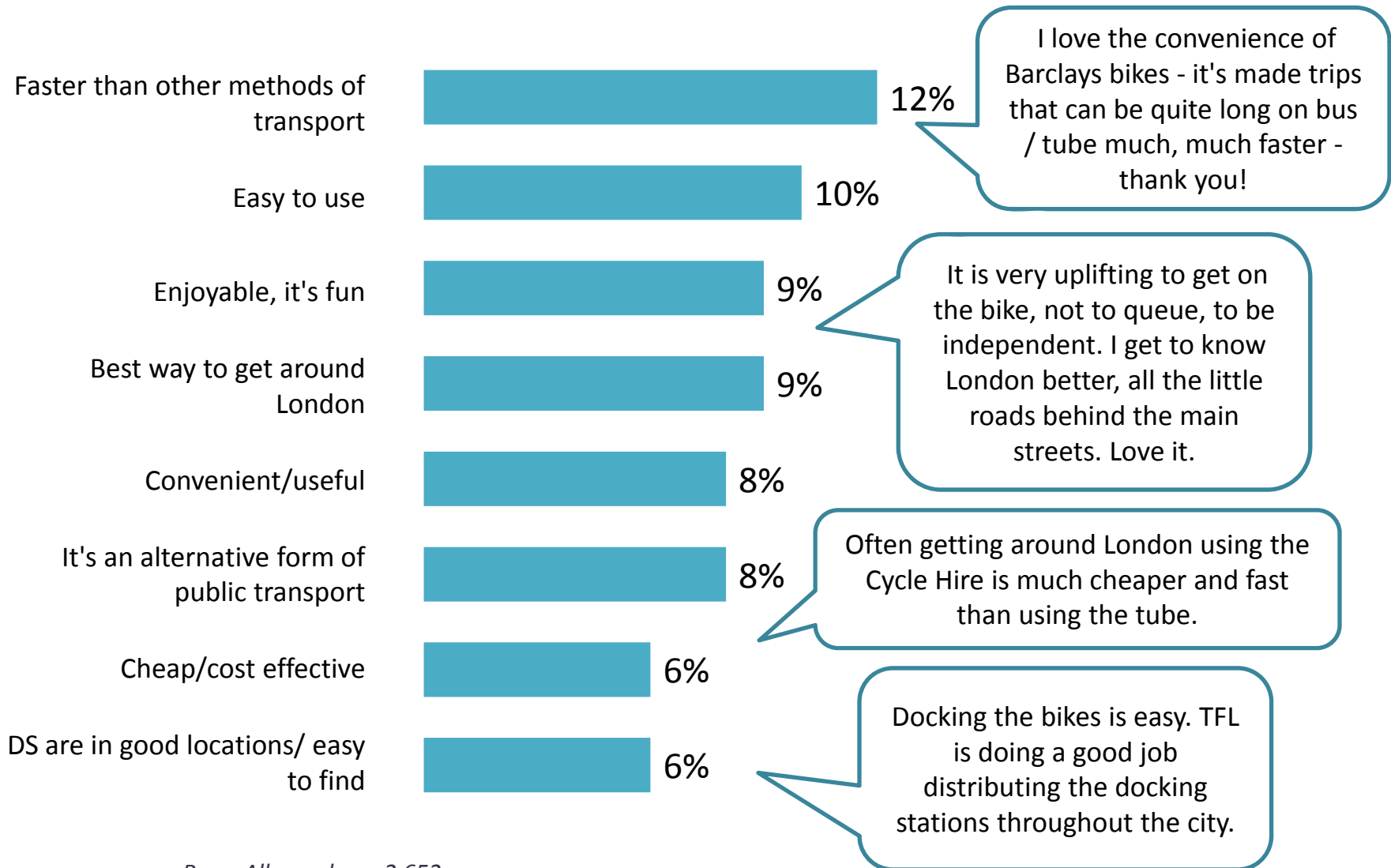
Q At what times do you typically use Barclays Cycle Hire



Base: All members: W1: 3,586, W2: 2,652

Members: speed, ease of use and enjoyment key positives for BCH

Q Thinking about your experience of using Barclays Cycle Hire what was particularly good about your experience? ALL MENTIONS ABOVE 5% ONLY



Base: All members: 2,652

Verbatims: Good Experiences

Getting around the centre of Central London is now much quicker and more pleasant. The 'London Cycle' iPhone app makes this even easier (not the official Barclays Cycle Hire one). Docking stations in the central area are well distributed. It's good value. I think the look of the bikes and docking stations enhances the look of the city. I like that they are environmentally friendly.

Very quick to unlock or return a bike - infinitely better than taking escalators to tube station or waiting for bus. Easy to break up a longer journey by stopping at cafes near the docking stations.

It is nice to be on a bike in London without having to bring one on the commute in (which is a pain, or impossible, in peak hours). I would prefer my own bike, but the Barclays bikes are a good compromise.

Finishing the journey with a quick clunk knowing you've been quicker and cheaper than the tube or bus and knowing you don't have a bike of your own locked up somewhere that you need to return to.

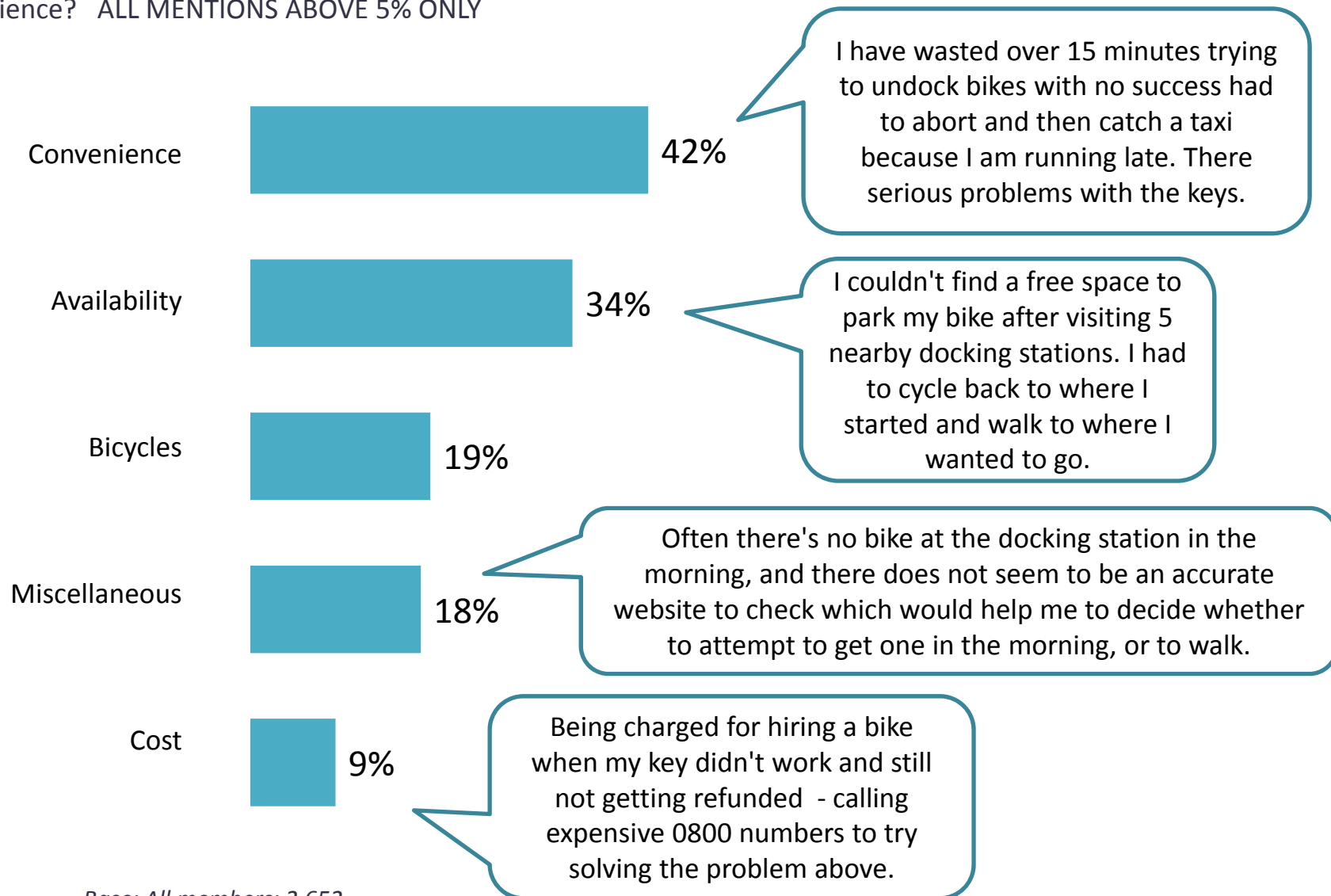
It's fun, and sociable if done with friends, seeing bits of London I wouldn't normally see, faster than walking and MUCH nicer than the tube.

The bicycles are generally in good condition (better than with Velib in Paris). Within the zone, the docking stations are well located. With an annual key, it's easy to use.

Having used an older system in Barcelona, I think the London service is very good. I have a key and I have used it as an occasional user and I decided to go for the annual membership as it is very good value for money in a city where public transport is so expensive.

Members: issues with convenience the key negative

Q Thinking about your experience of using Barclays Cycle Hire what was particularly bad about your experience? ALL MENTIONS ABOVE 5% ONLY



Base: All members: 2,652

Verbatims: Bad Experiences

Some days the keys don't work at certain stations. Often the credit card way won't work if I want a friend to join. WHY NOT: let me use one key with my annual membership and then pay £1 a day for up to two extra cycles on the same day in case friends join? Also, when the scheme started I got two casual use keys for £1 a day when friends joined. HOWEVER, when I used one key, both were charged. That has to be the dumbest system ever invented.

I would say that at least 50% of the time when I try and use cycle hire I am unable to get a bike out. The light goes amber for ages, then goes red. There seems to be no explanation for it at all, because the next day I will try it and it will work fine...I am not the only one who has suffered this either, as I often witness other users experiencing the same problems as me.

The two big issues for me are safety - my normal route home involves crossing Park Lane, which is a hairy experience and the usual cycling hazards are ever present - and unpredictability of spaces at a destination docking station in time critical situations, e.g. getting to a meeting and or catching a train.

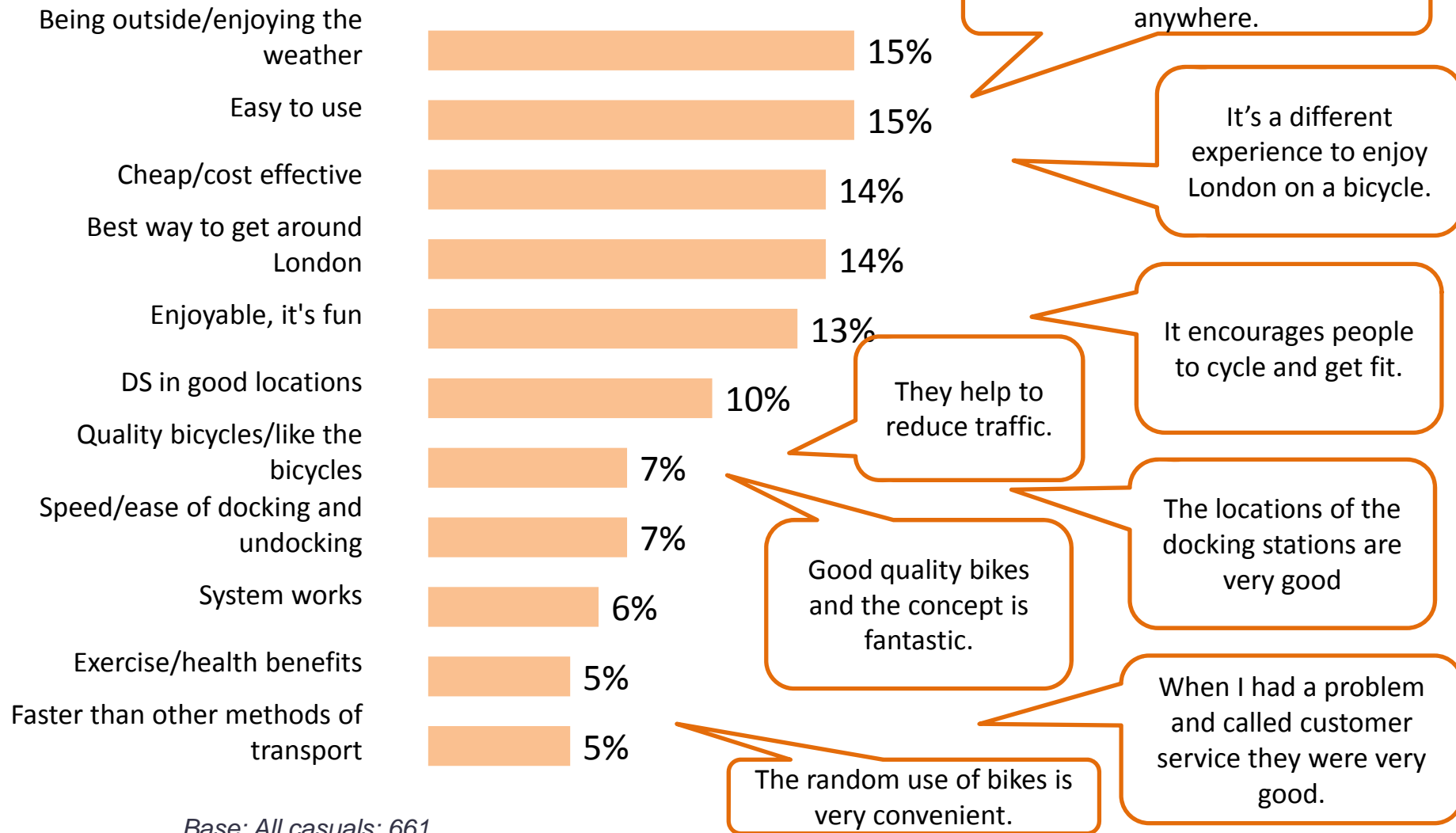
All apps I've tried for my phone which download data from TFL about which stations have bikes/docks are consistently wrong about the bikes available. I suspect it's because the network is slow to update? Even your website is usually wrong.

Surely there must be a predictable pattern of what time you need to fill a station by? Great Titchfield St at 7pm is a great example- EMPTY more often than not at that time. Speed of refill from when reported empty is hours too late.

Bikes are very heavy, gears are inappropriate, keys sometime fail, docking points are VERY rarely available at my destination, and going to an alternative would take me too far from work to be convenient.

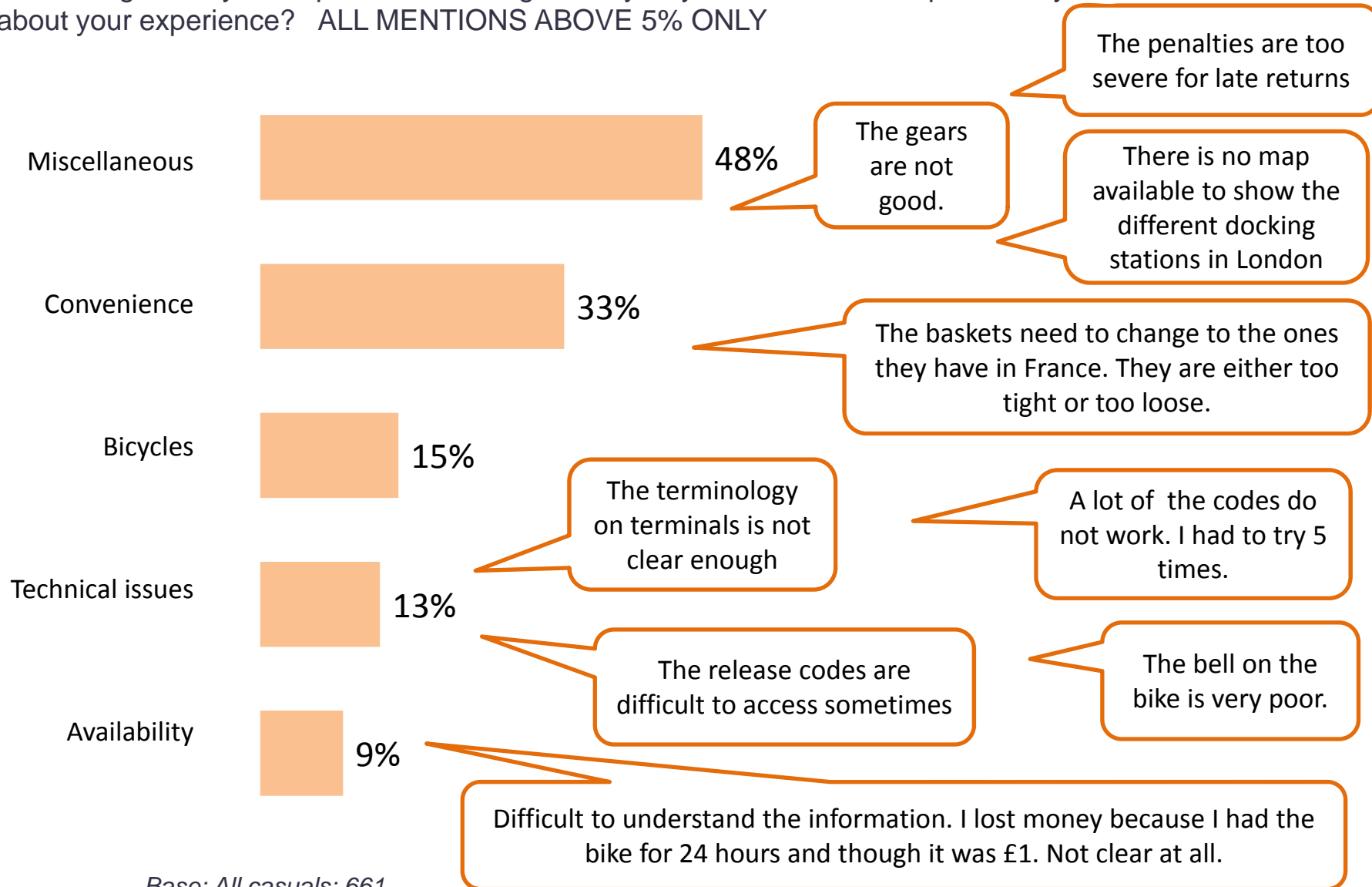
Casuals: being outside and enjoying the weather as well as ease of use are key positives for BCH

Q Thinking about your experience of using Barclays Cycle Hire what was particularly good about your experience? ALL MENTIONS ABOVE 4% ONLY



Casuals: miscellaneous problems the key negative

Q Thinking about your experience of using Barclays Cycle Hire what was particularly bad about your experience? ALL MENTIONS ABOVE 5% ONLY

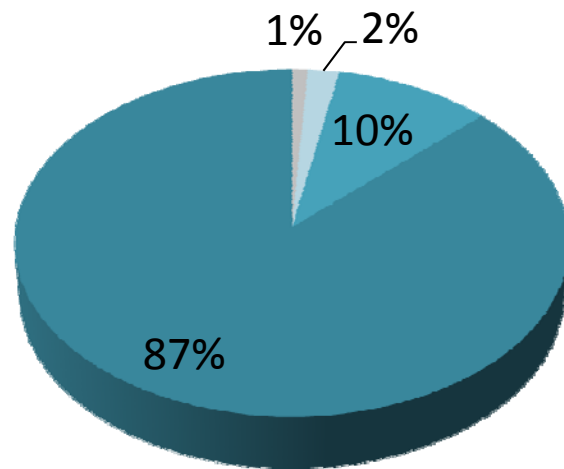


Base: All casuals: 661

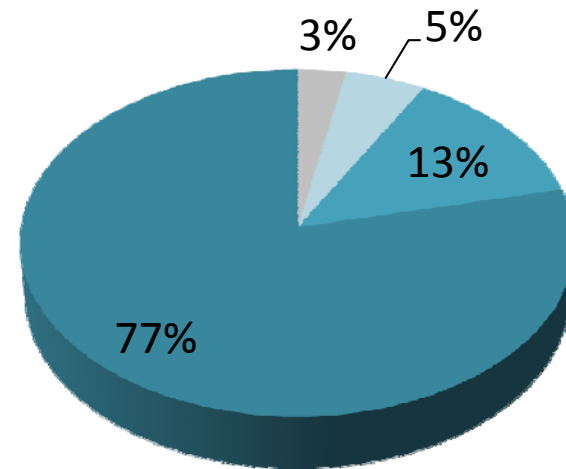
Likelihood to use again is falling

Q How likely, if at all, are you to use Barclays Cycle Hire again?

■ Very likely ■ Fairly likely ■ Not very likely ■ Not at all likely



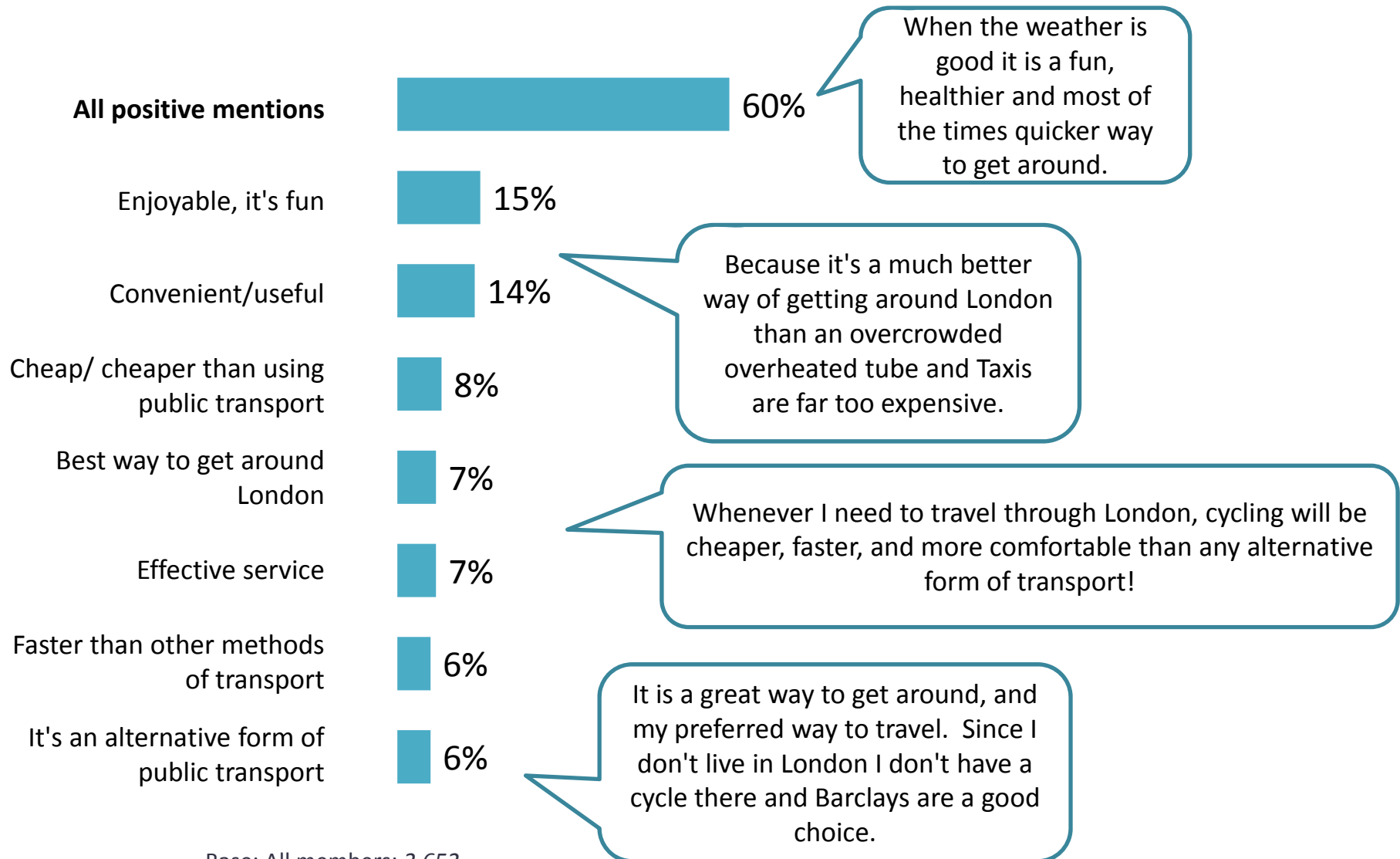
Wave 1



Wave 2

Enjoyment and convenience key reasons to use BCH again

Q Why do you say that? POSITIVE MENTIONS ABOVE 5% ONLY



Base: All members: 2,652

Verbatims: likely to use again

Because it's cheap, and I can pick up and drop off a bike at will. I don't have to struggle with a bike on the train up to London, and I don't have to heave a lock around. And you can wear a skirt riding them!

Because I like to do exercise and keep fit myself...because it is summer and its more comfortable using a bike rather than tube or bus, mainly in rush hours when transport is very crowded. Because it easy to move. Because I can use 30 mins for free. Because I don't have to worry about maintenance.

It is preferable to the tube or any other public transport and is the quickest way for me to commute to work while also keeping fit at the same time.

Because I believe cycling is the most economical, healthiest and convenient way to travel around London, and sometimes it is more convenient to use Cycle Hire than to use my own bike.

Because it is convenient and fun. A nice way to spend the weekend and to get around in London - particularly with friends who visit from abroad.

When it works it is a much better way to get about than standing on a packed and stuffy tube train. The benefit is that you feel like you are doing something healthy as well.

Availability and reliability key reasons not to use BCH again

Q Why do you say that? NEGATIVE MENTIONS

All negative mentions

Other negative

Poor availability of bicycles

Poor availability of spaces at DS

Unreliable form of transport

It has teething problems

Keys do not work

Have my own bike

Lack of DS

Poor contact centre

Problems with billing/
overcharging

Traffic too heavy/ roads
dangerous

Zones need to be extended

13%

4%

3%

2%

2%

2%

2%

2%

1%

1%

1%

1%

1%

At the moment, it is not a reliable source of travelling from A to B if you need to get there within a certain time.

Lack of cycles available at peak times near Euston. When cycles are available system is let down by not working. System must be reliable for people to be able to trust the transport for regular commutes.

I would use it all the time but persistent unlock problems with station/key mean I can't rely on it when I'm in a hurry.

Just fed up walking around London trying to find a bike to ride and find a docking station as apps are not all ways up to date or have closures of bike bays.

Verbatims: unlikely to use again

1. Rubbish hardware: The bicycles are heavy, slow and finding an empty docking station during peak hours is like playing the lottery (you've got no chance). 2. Any public or private service where it takes Customer Services 2 weeks + to contact a customer who has a discrepancy should be a criminal offense.

Have not used it since the time I could not find a docking station; am reluctant to do so again until I hear that the problems with the information given have been acknowledged and addressed.

The service received was disgraceful. Staff were not polite, did not return my calls. Lied to me. Did not solve my issue.

Because the concept is great and I would like to cycle in London, but your system is awful. Often there are no bicycles or no free docking stations. I also can't use my two credit cards in your system...they appear to have been invalidated.

Not for commuting to work - because of unreliability and the 15 minute wait when they fail. Would possibly use for recreational use, but a bit heavy and cumbersome for this. They are far more suitable for commuting, but reliability meant I could not trust them to work when I needed.

You'd have to improve the scheme considerably (see all my previous replies): ease of (un-)docking, the gears, the Helpline and giving people assurance they don't get overcharged.

Three in five use BCH at least once a week

Q Typically how often do you use the following to get around London?

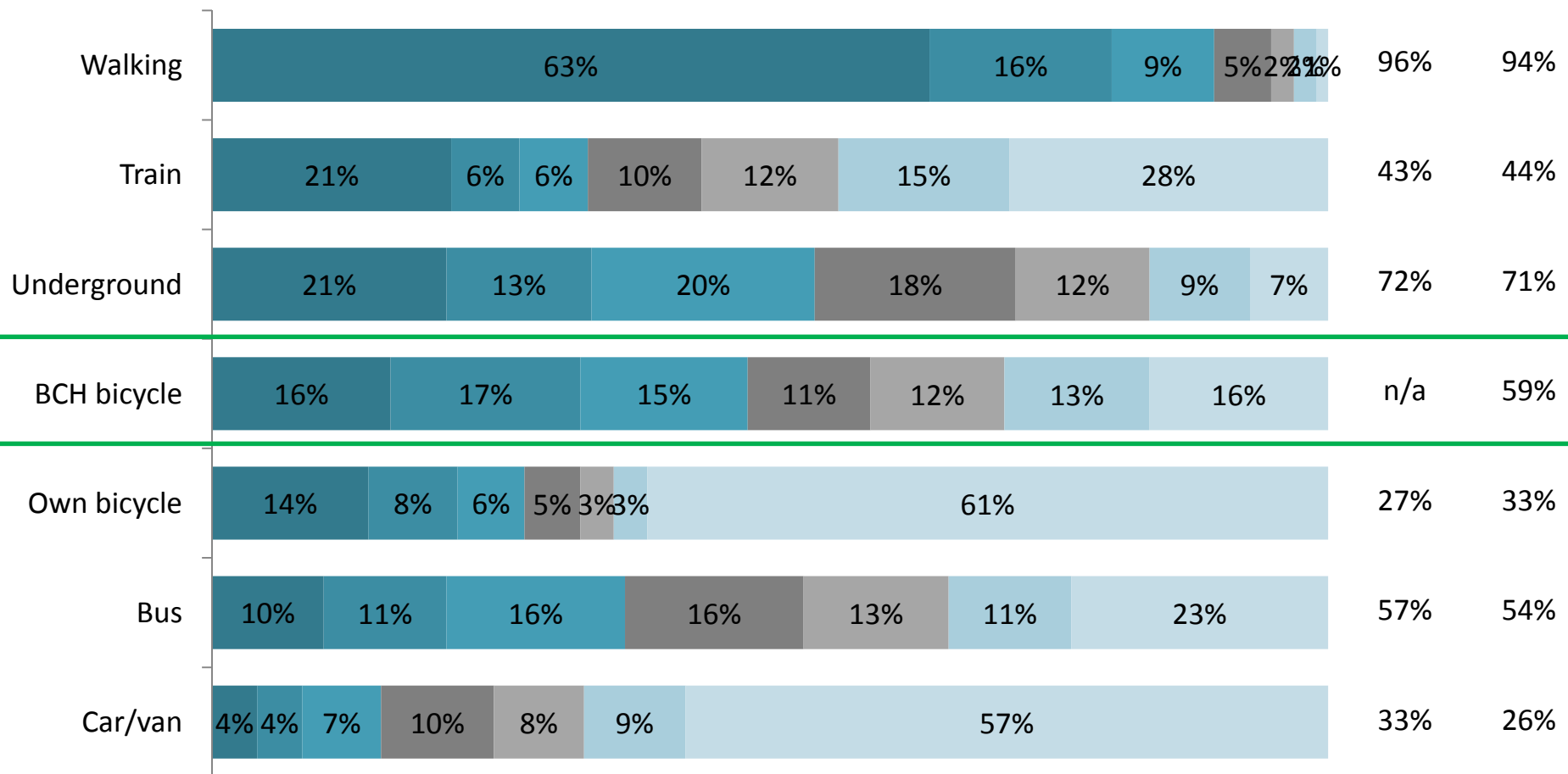
At least once a week

■ 5 or more days a week
■ Once a week
■ Less than once a month

■ 3-4 days a week
■ Once a fortnight

■ 2 days a week
■ Once a month

Wave 1 **Wave 2**

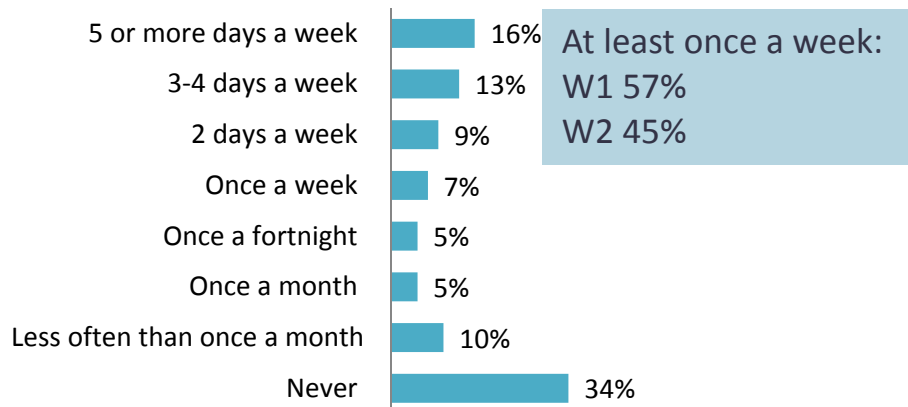


Base: All members: 2,652

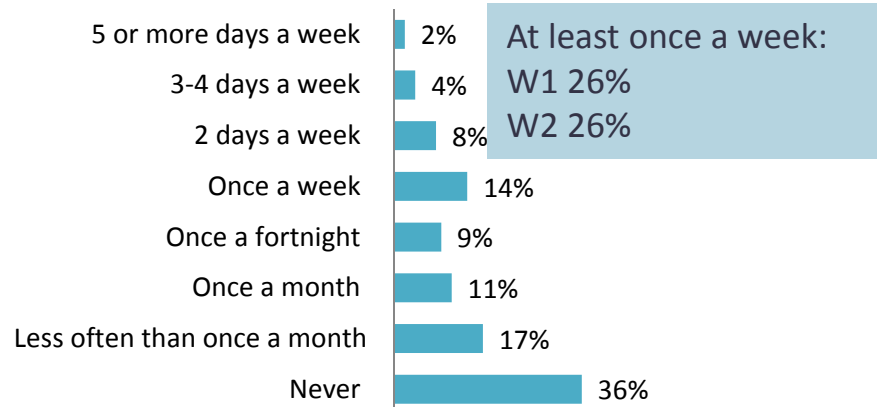
Commuting most frequent with BCH

Q And how frequently do you make each of the following type of trips using Barclays Cycle Hire?*

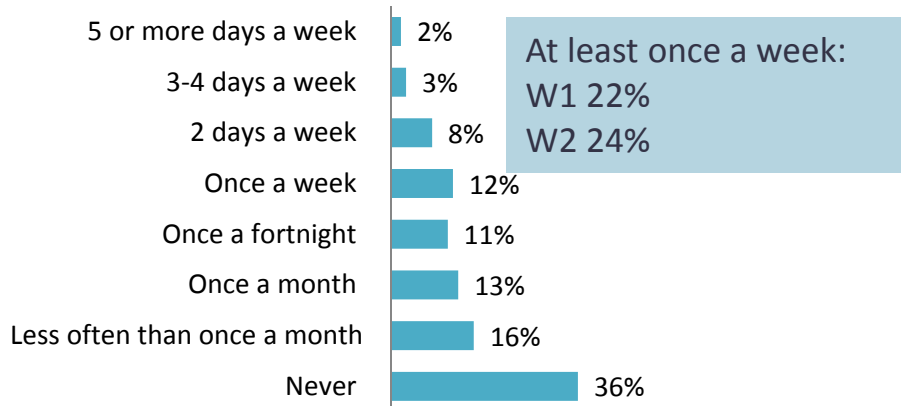
Commuting to or from work



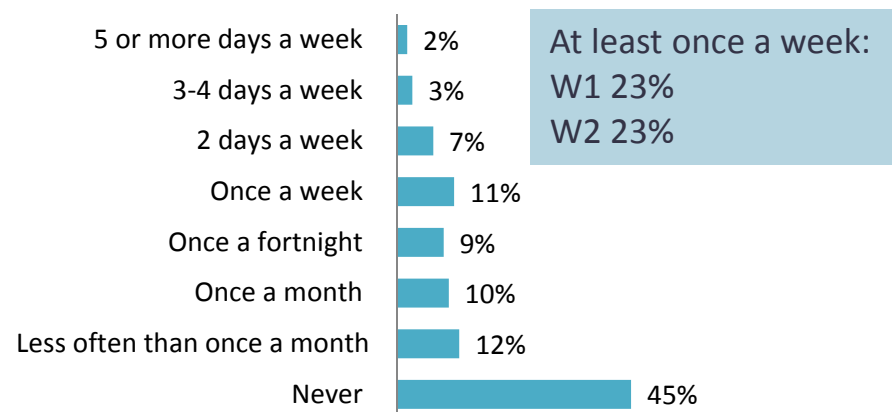
Leisure



Socialising



Personal business

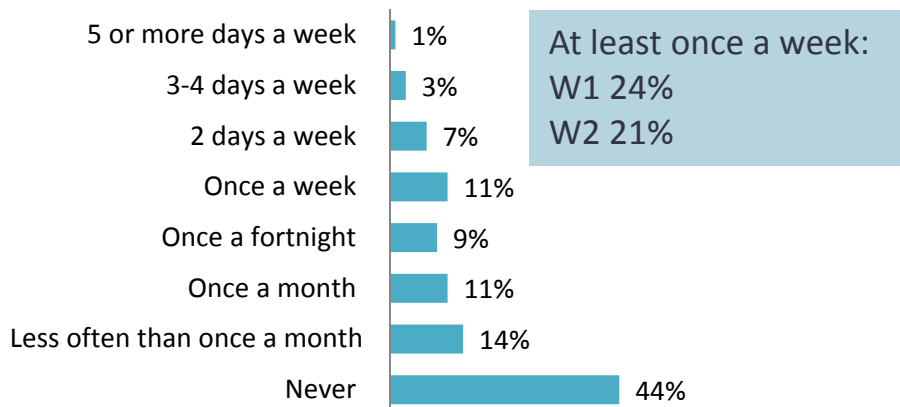


Base: All members: 2,652

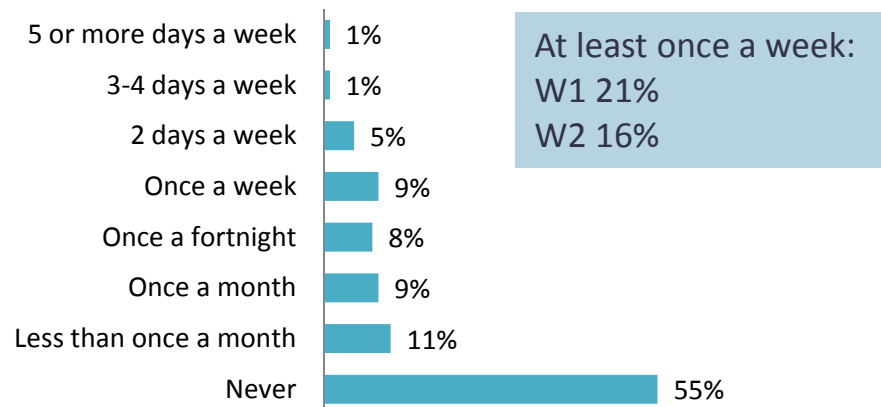
Travelling to/from place of education least frequent with BCH

Q And how frequently do you make each of the following type of trips using Barclays Cycle Hire?*

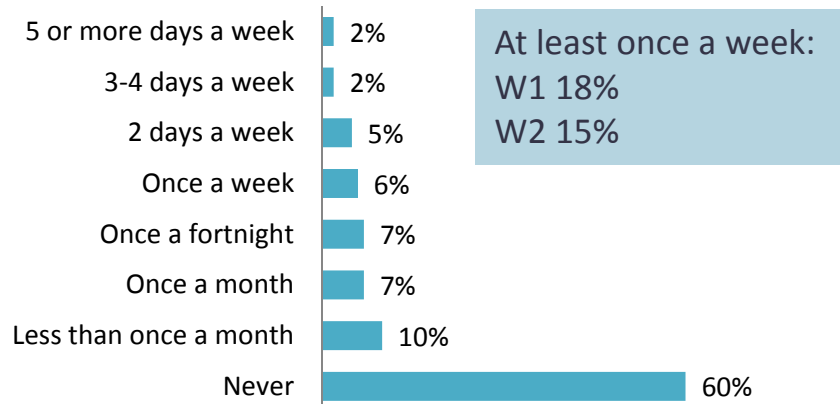
Visiting/ meeting friends/ relatives



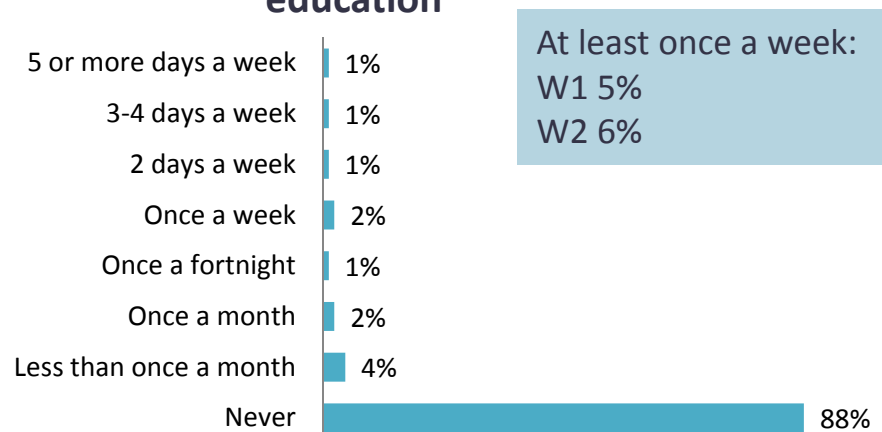
Shopping



Employer's business

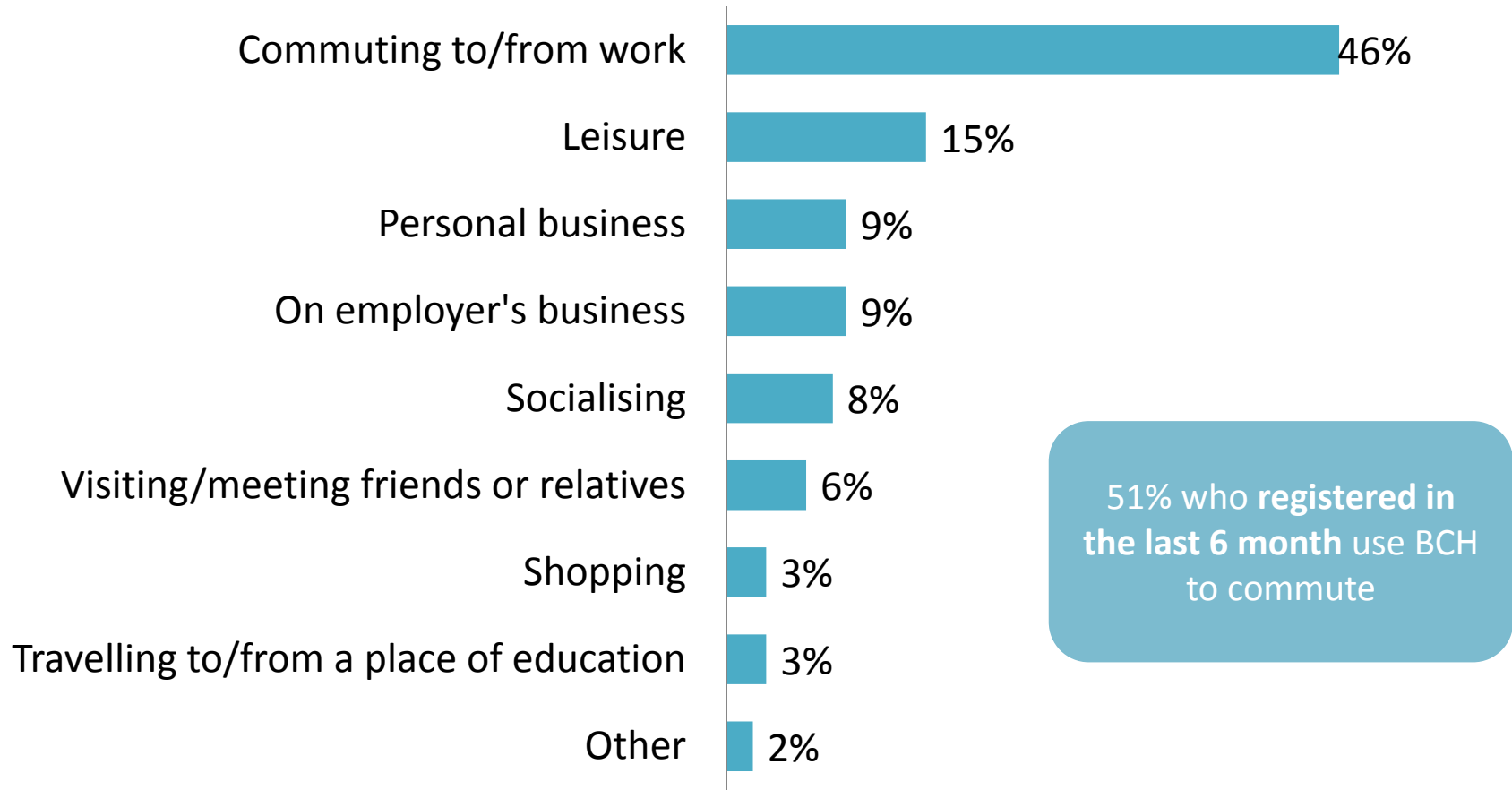


Travelling to/from a place of education



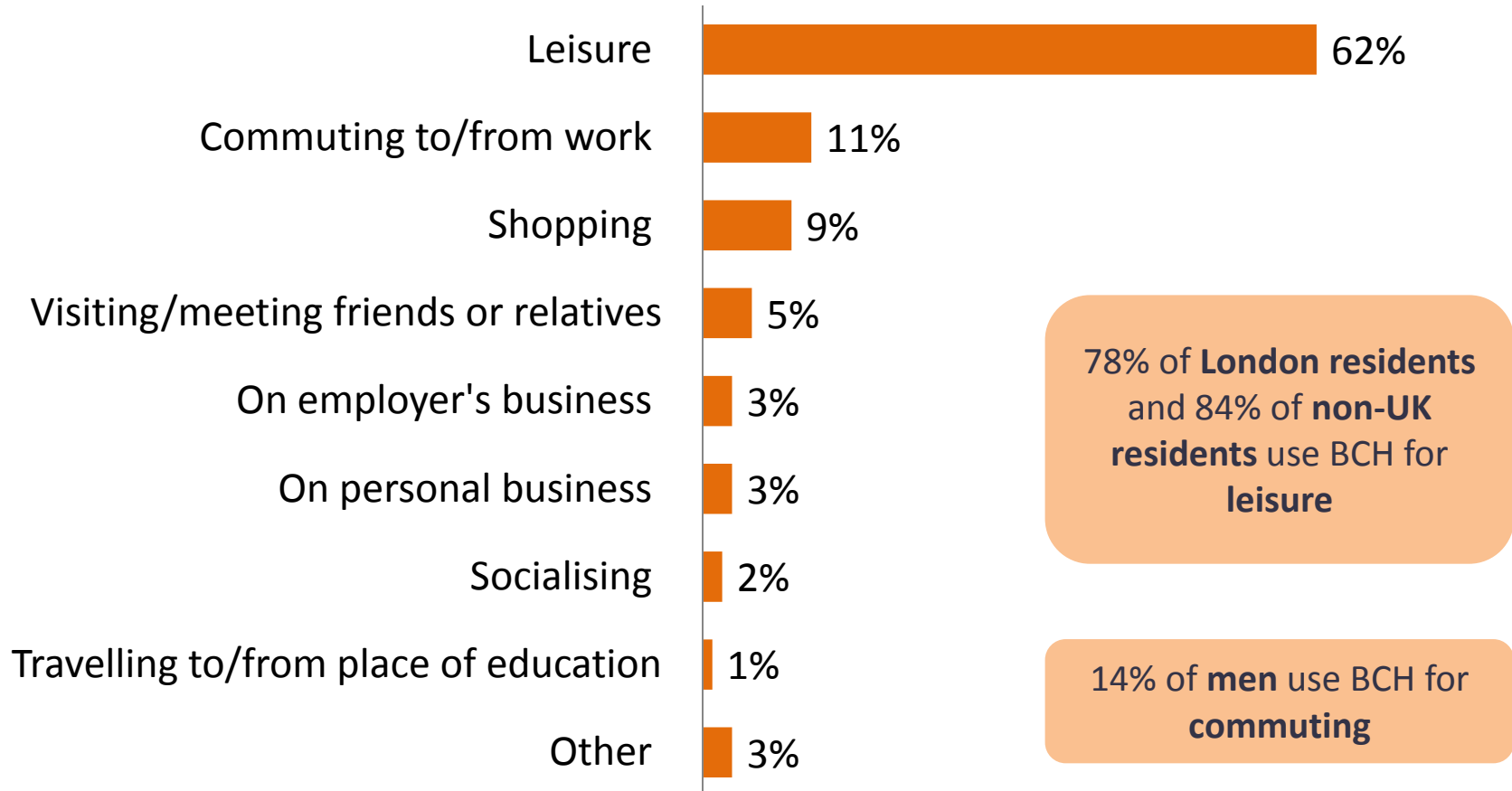
Members: commuting most frequent purpose, followed by leisure; travelling to/ from place of education least frequent purpose⁷⁰

Q And which type of trip do you make most frequently using Barclays Cycle Hire



Majority of casuals use BCH for leisure

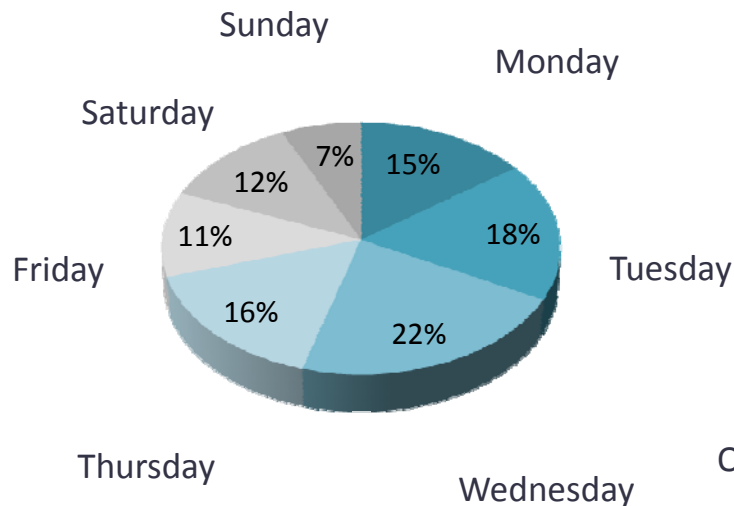
Q What is the main purpose of this trip you are making today using Barclays Cycle Hire?



Base: All casuals: 1,034

Monday to Thursday most likely days to make a BCH trip

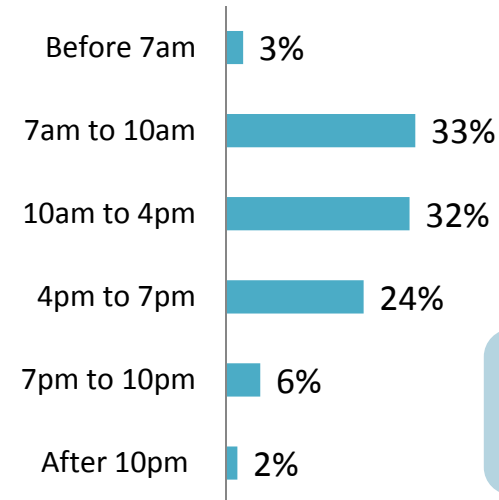
Q On which day of the week did you make this trip?



Weekday: 82%
Weekend: 18%

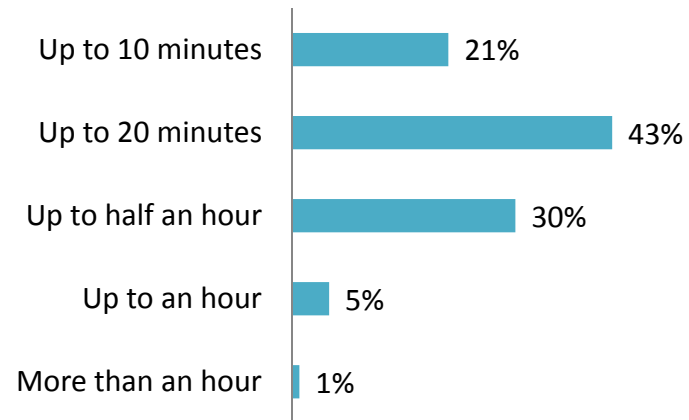
Base: All members: 2,652

Q And at what time of day did you start this trip?



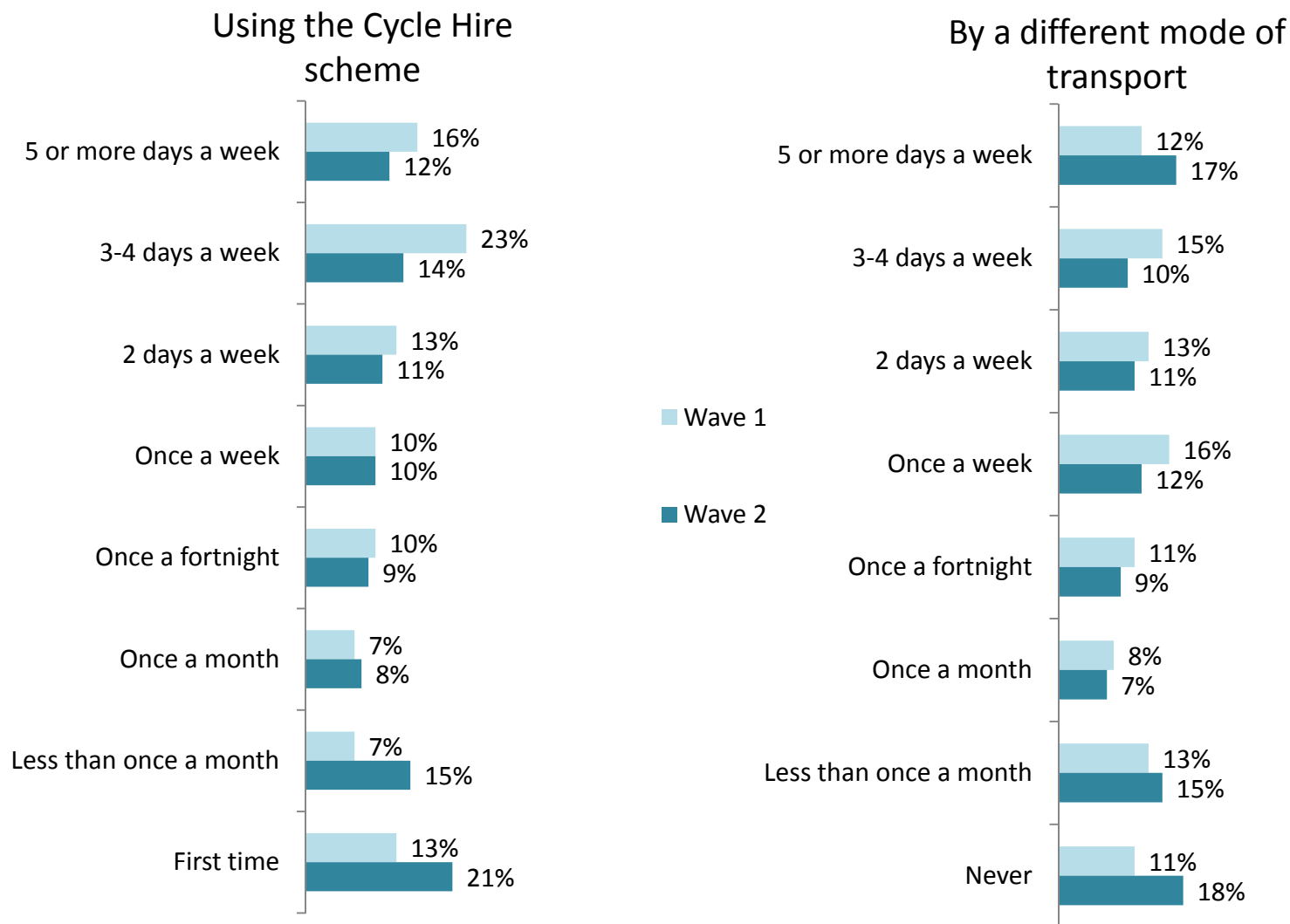
Peak: 57%
Off peak: 43%

Q How long did you hire the bicycle for on this trip?



Just over one in ten use BCH five days or more a week; slightly more make the same trip five days a week or more by a different mode of transport

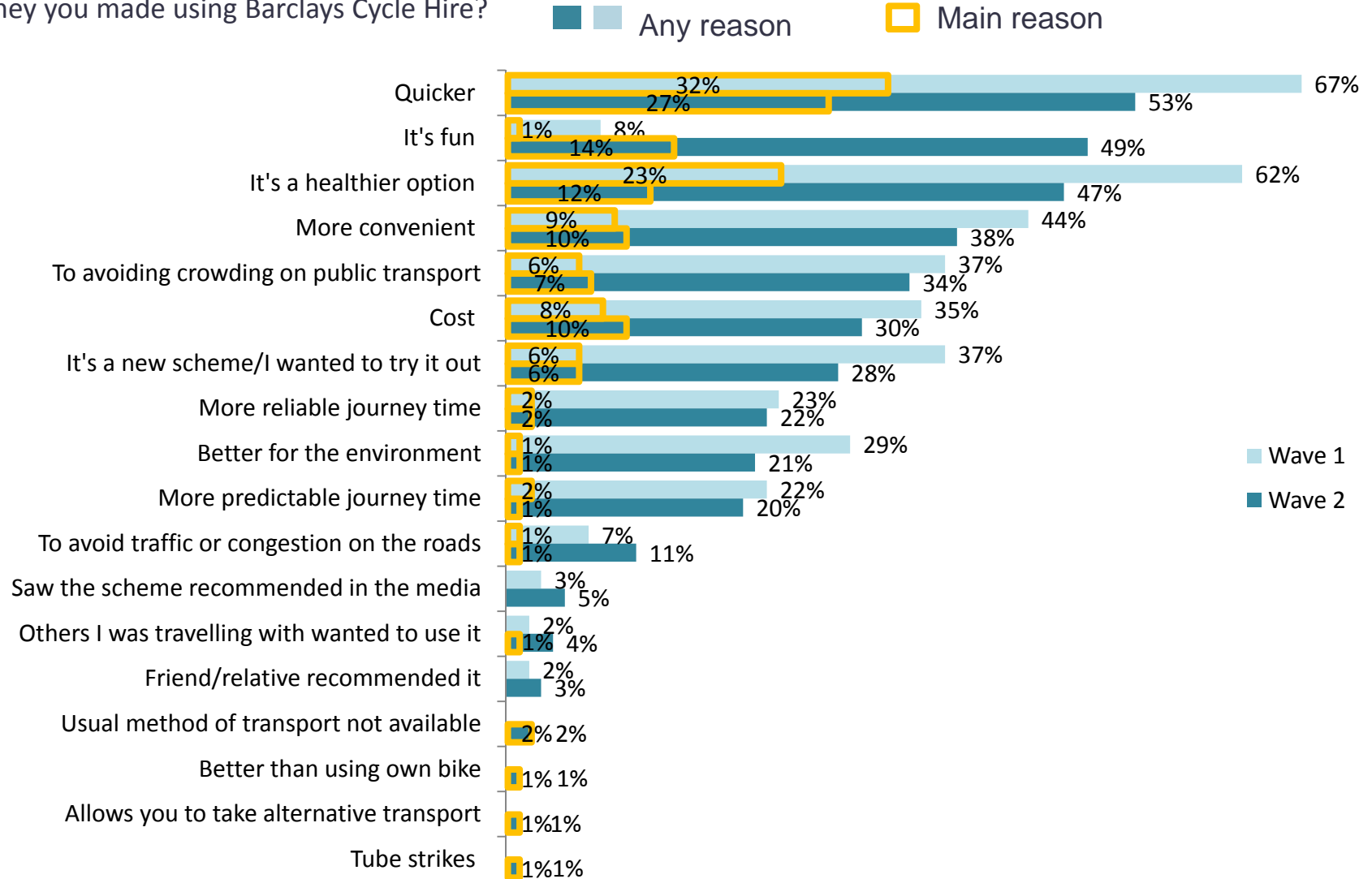
Q How frequently do you make this trip....?



Base: All members: W1: 3,754, W2: 2,652

Speed and fun main reasons to switch to BCH for members who made the journey before

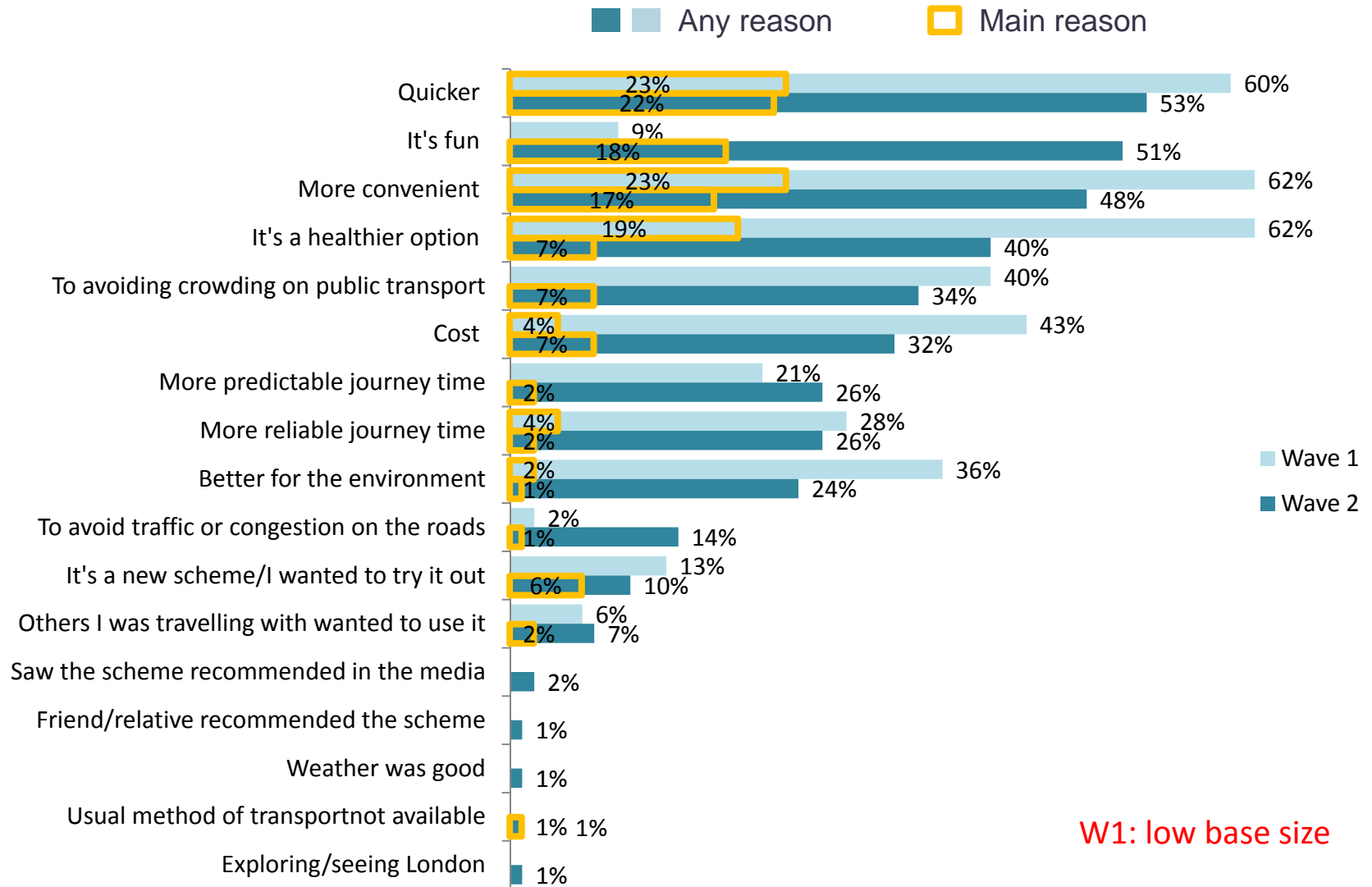
Q Why did you switch from travelling by [transport] to using a Cycle Hire bicycle for this trip/the part of the journey you made using Barclays Cycle Hire?



Base: All members who have made this trip before using BCH: W1: 604, W2: 2100

For members who have made the journey before, speed and fun are also the top reasons to pick BCH

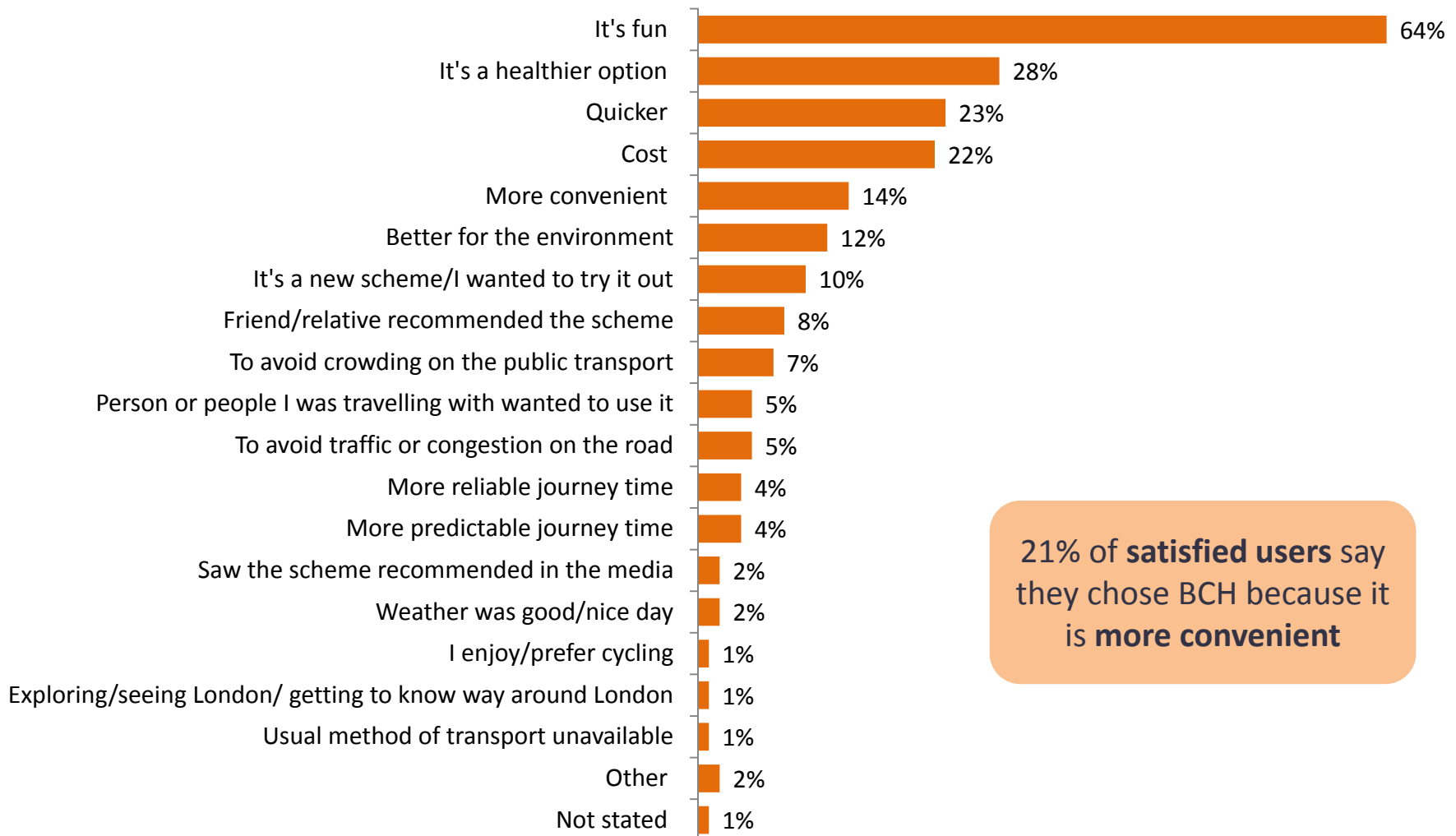
Q Why did you choose to make this trip using a Barclays Cycle Hire bicycle?



Base: All members who have not made this trip before using BCH: W1: 47, W2: 475

Two thirds of casuals users chose to make their trip with BCH because it is fun

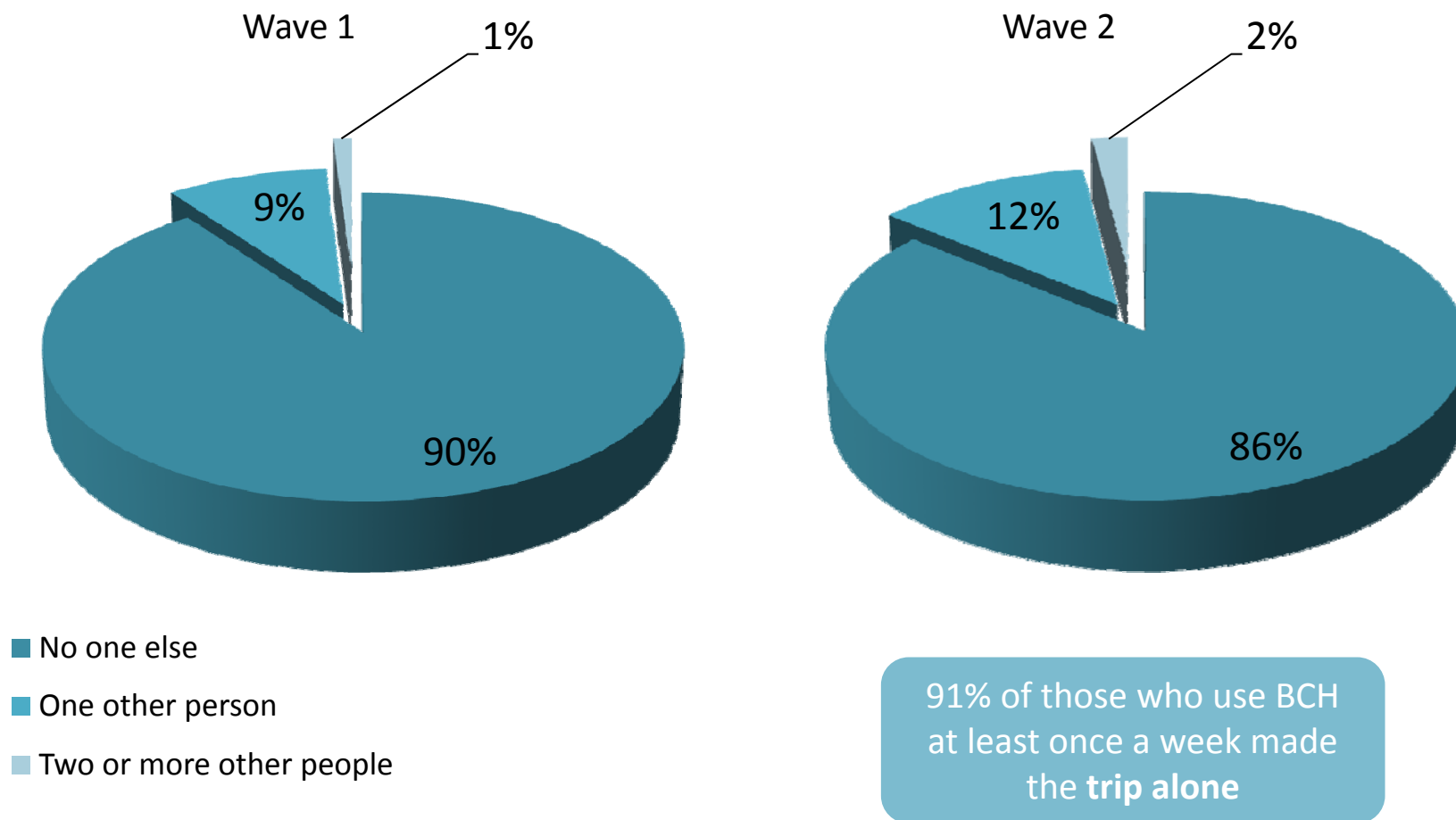
Q Why did you choose to make this trip using a Barclays Cycle Hire bicycle?



Base: All casuals: 639

Most trips still made alone, but trips in pairs increasing

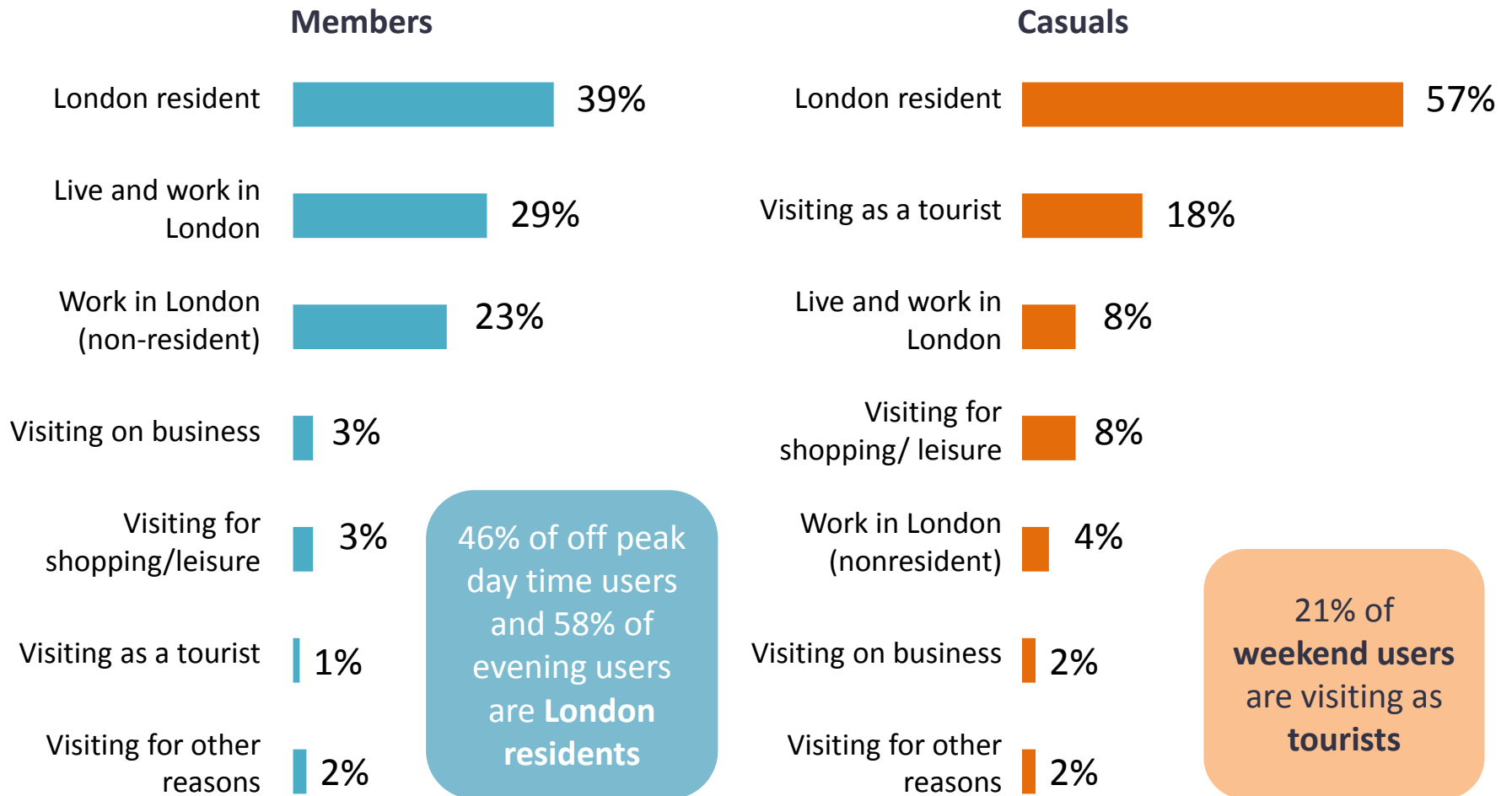
Q How many people made this trip using a Barclays Cycle Hire bicycle with you (i.e. also hired a bicycle and travelled with you)/ the part of the journey you made using Barclays Cycle Hire with you (i.e. also hired a bicycle and travelled with you).



Base: All members: W1: 1,350, W2: 2,652

Two in five casuals are tourists, whereas less than 1% of members are in London for tourism purposes

Main reason for being in London*



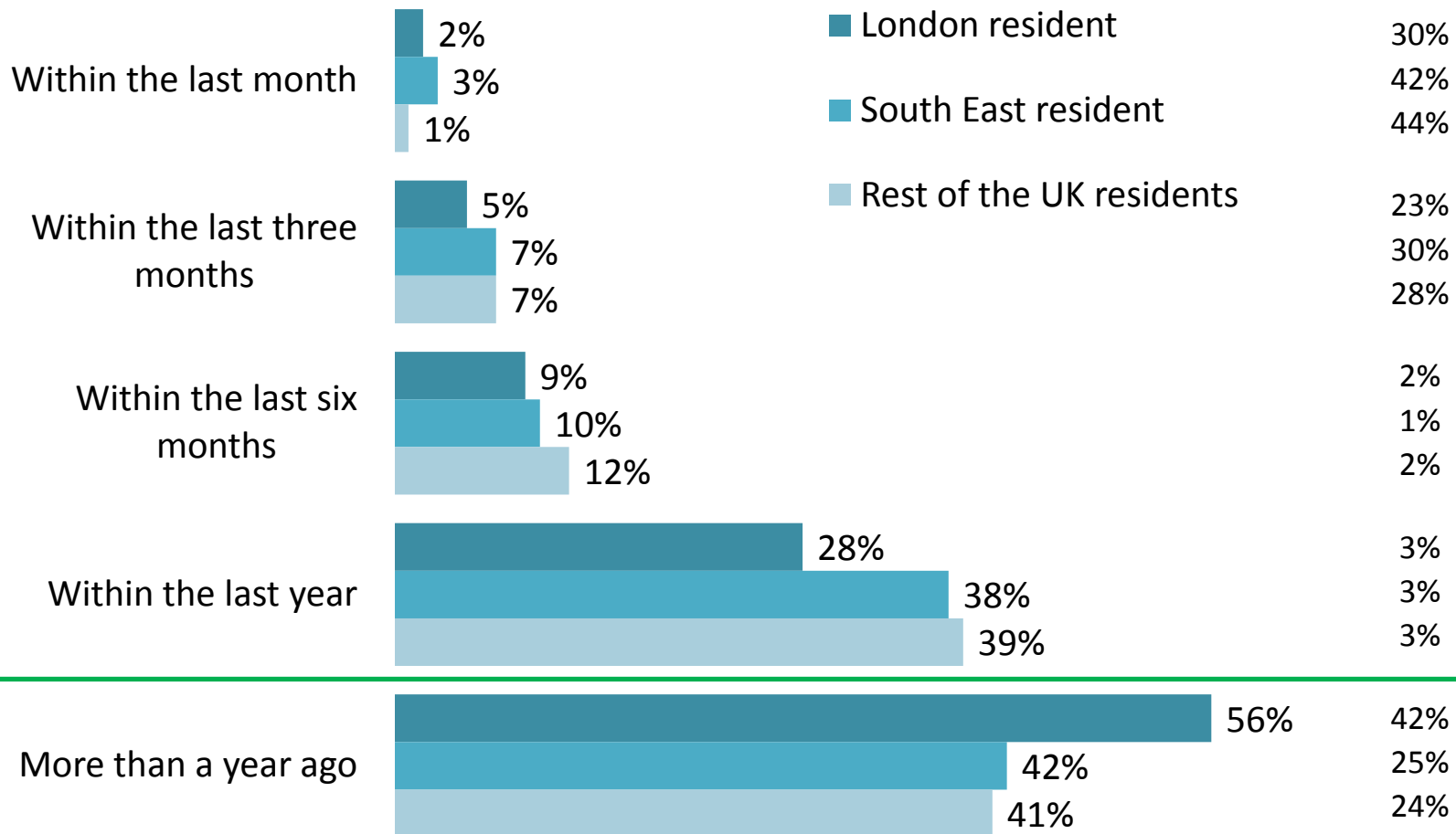
* Question wording; Members: What was the main reason you were in London on the day you last made this trip using Barclays Cycle Hire?; Casuals: And can I just check, what is the main reason you are in London today?

Base: All members: 2,652; All casuals: 1,034

London residents are most likely to have started cycling a year ago

Q When did you start cycling in London?

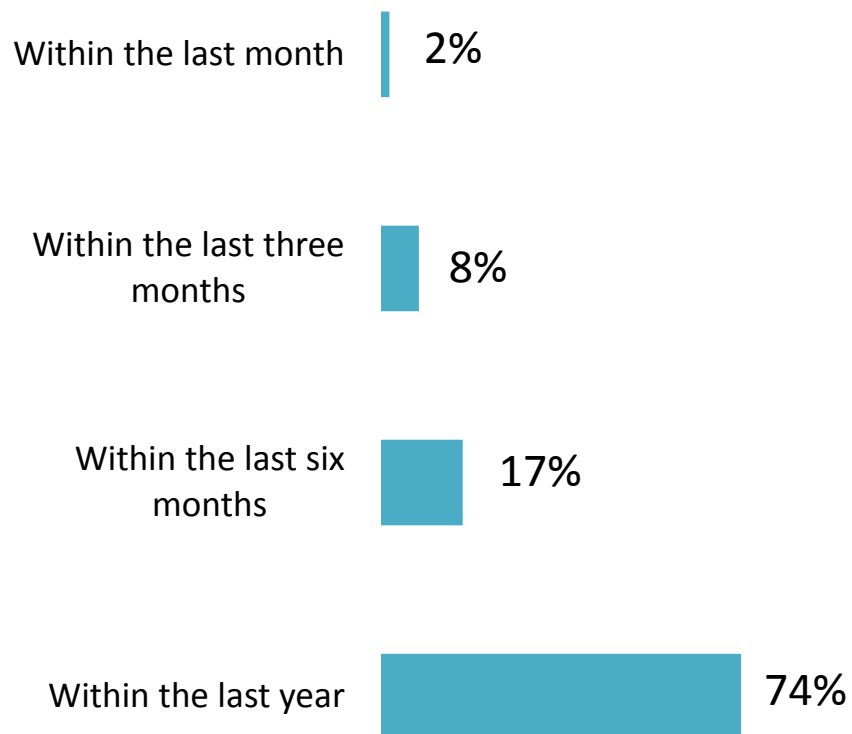
Wave 1



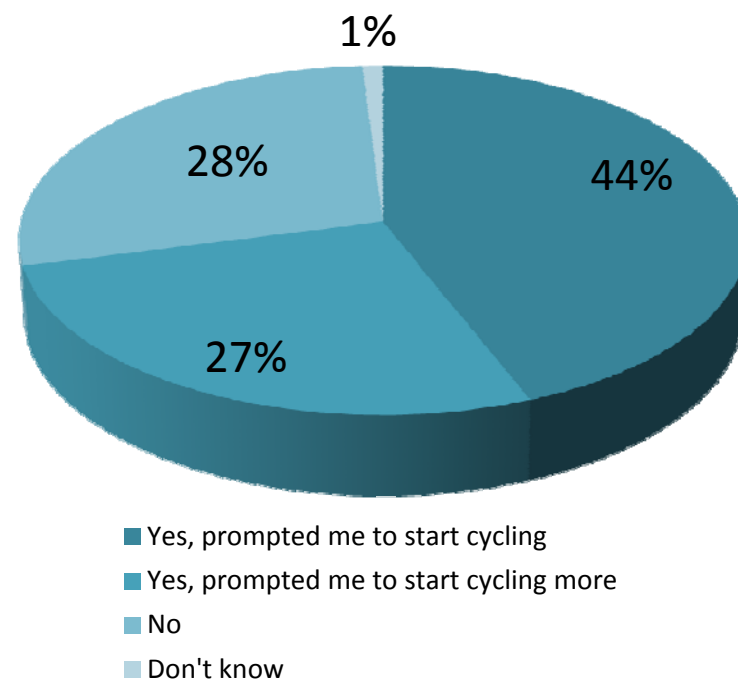
Base: All members who are London residents: 1,873; South East residents: 548; rest of the UK residents: 193

Three quarters started using BCH within the last year

Q When did you start using Barclays Cycle Hire?

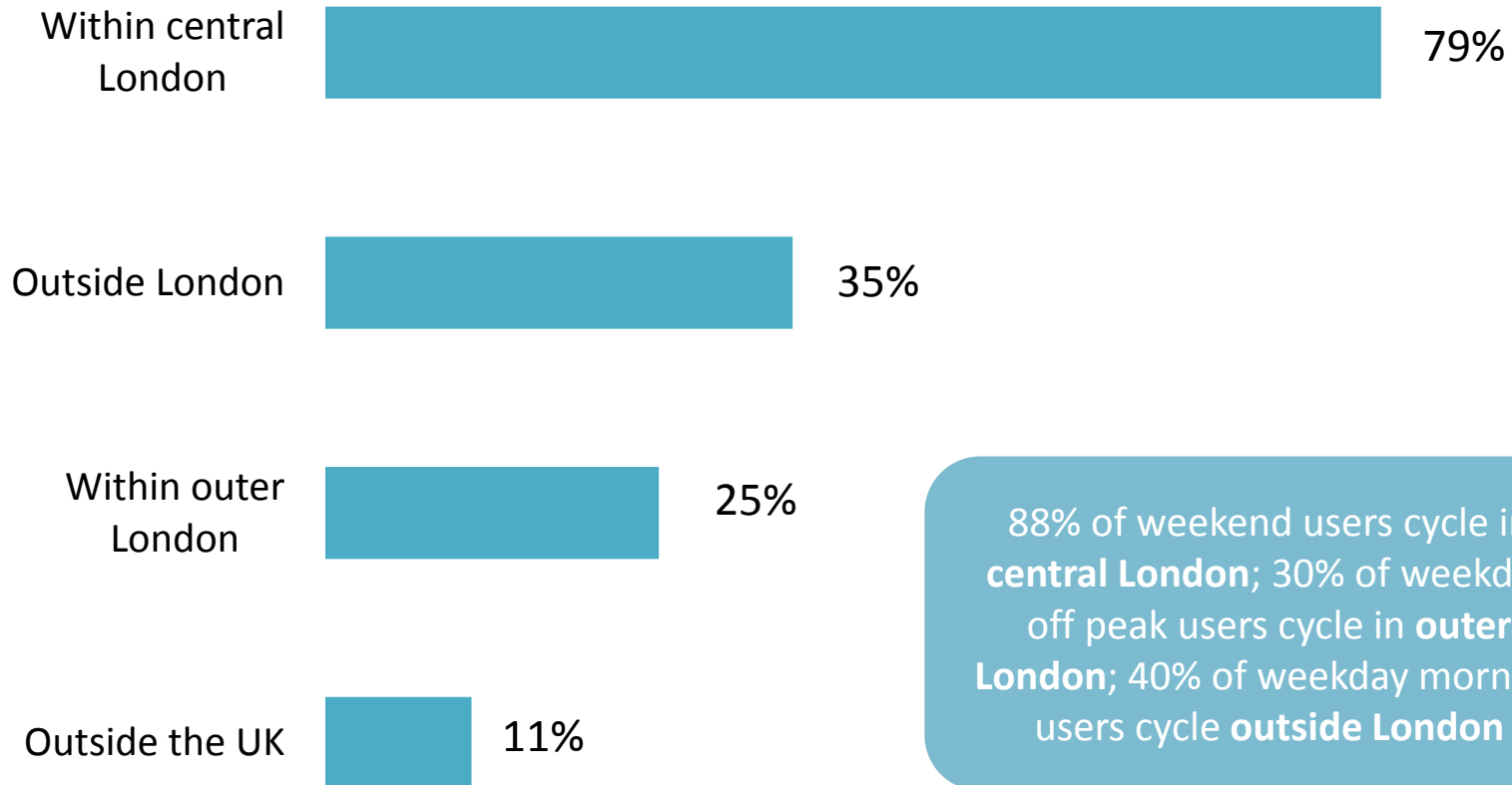


Q Did Barclays Cycle hire prompt you to start cycling/start cycling more in London?



Four in five cycle in central London; only one in ten cycle outside the UK

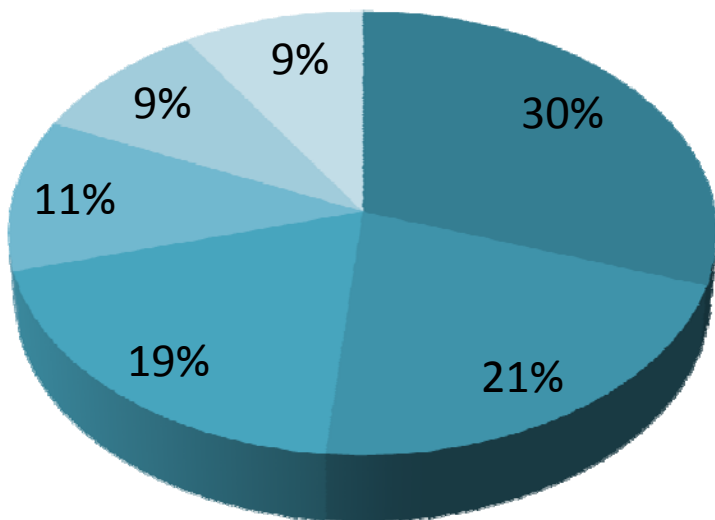
Q Where do you cycle (and by this we mean generally not just using the Barclays Hire)?



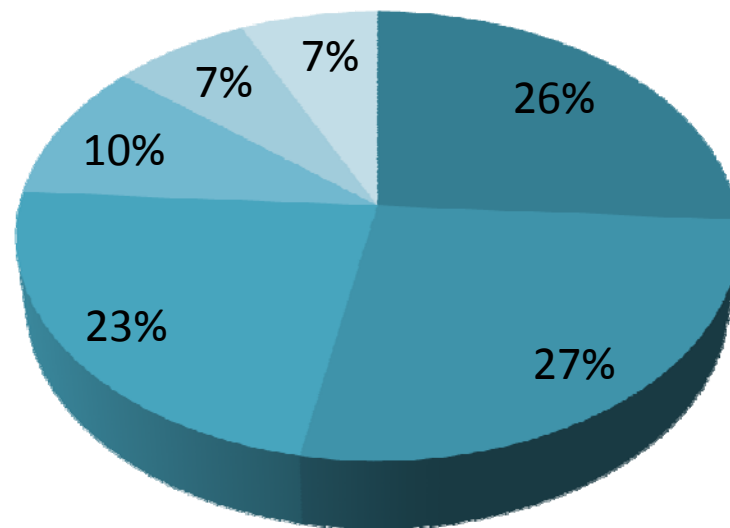
A quarter do not have a bicycle in their household

Q How many bicycles are owned and available for use in your household?

Wave 1



Wave 2



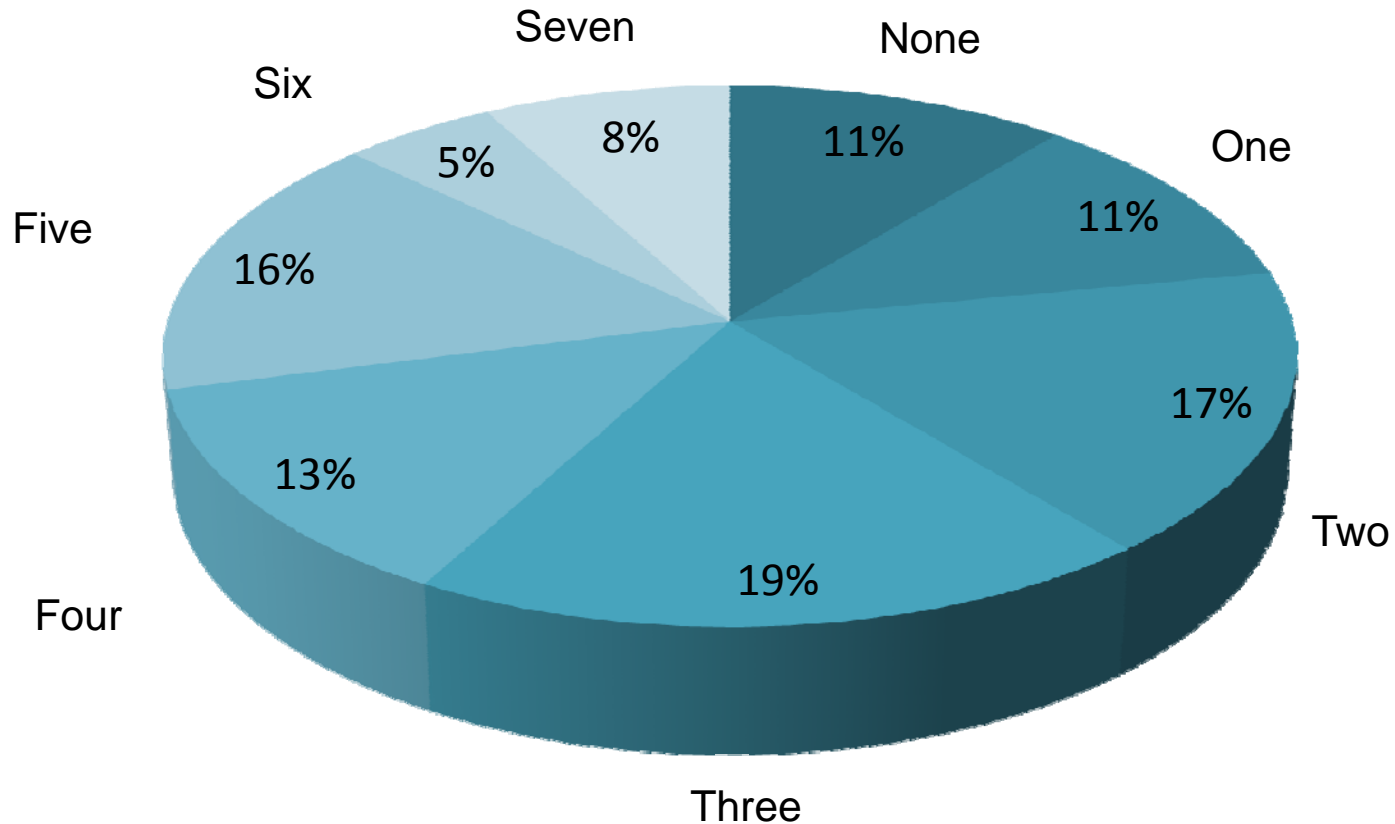
■ None ■ One ■ Two ■ Three ■ Four ■ Five or more

38% of weekend users do
not have their own bicycle

Base: All members: W1: 3,754, W2: 2,652

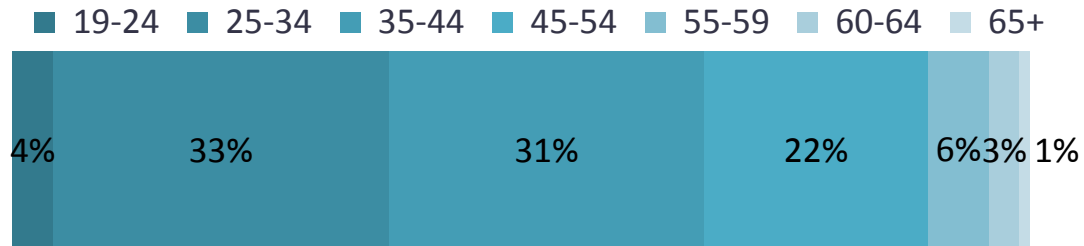
Members most likely to complete 30 minutes of physical activity on three days in the past week

Q In the past week, on how many days have you completed 30 minutes or more physical activity? e.g. brisk running, sport or cycling

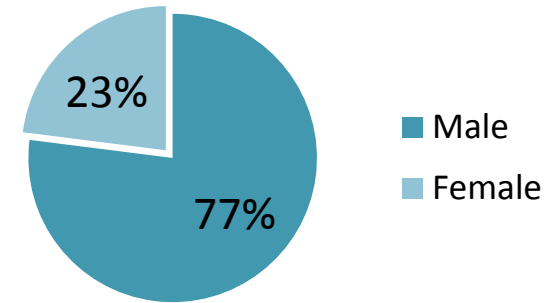


Members: Majority of users are working, white males

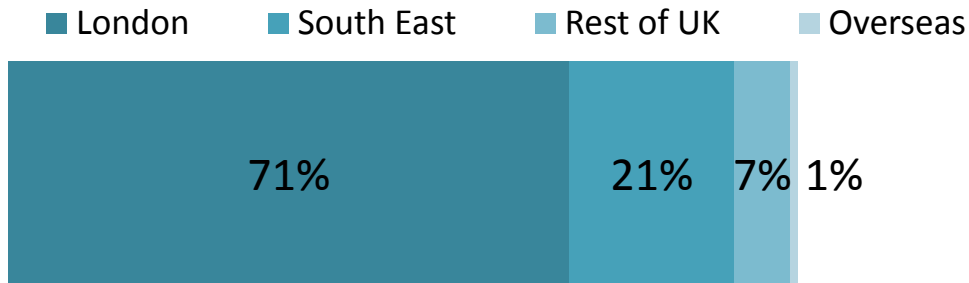
Age



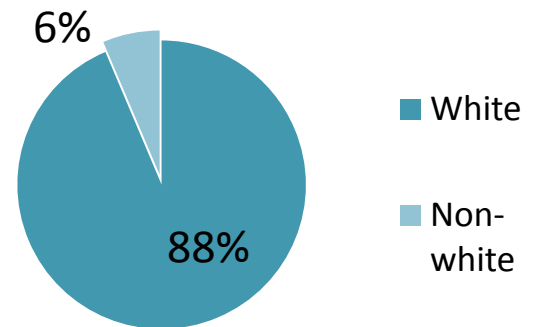
Gender



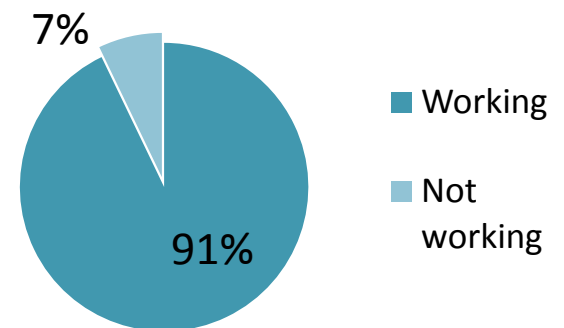
Region



Ethnicity

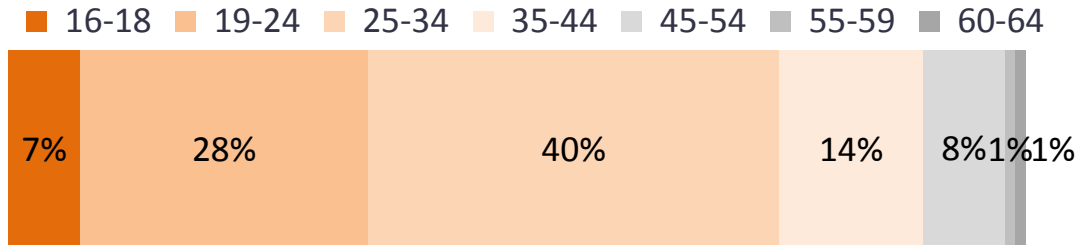


Working status

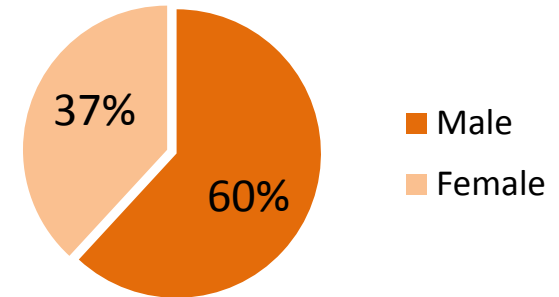


Casual users less likely to live in London and be male than members

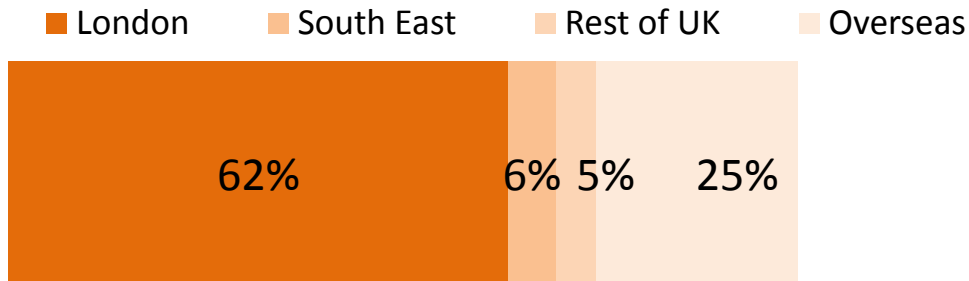
Age



Gender



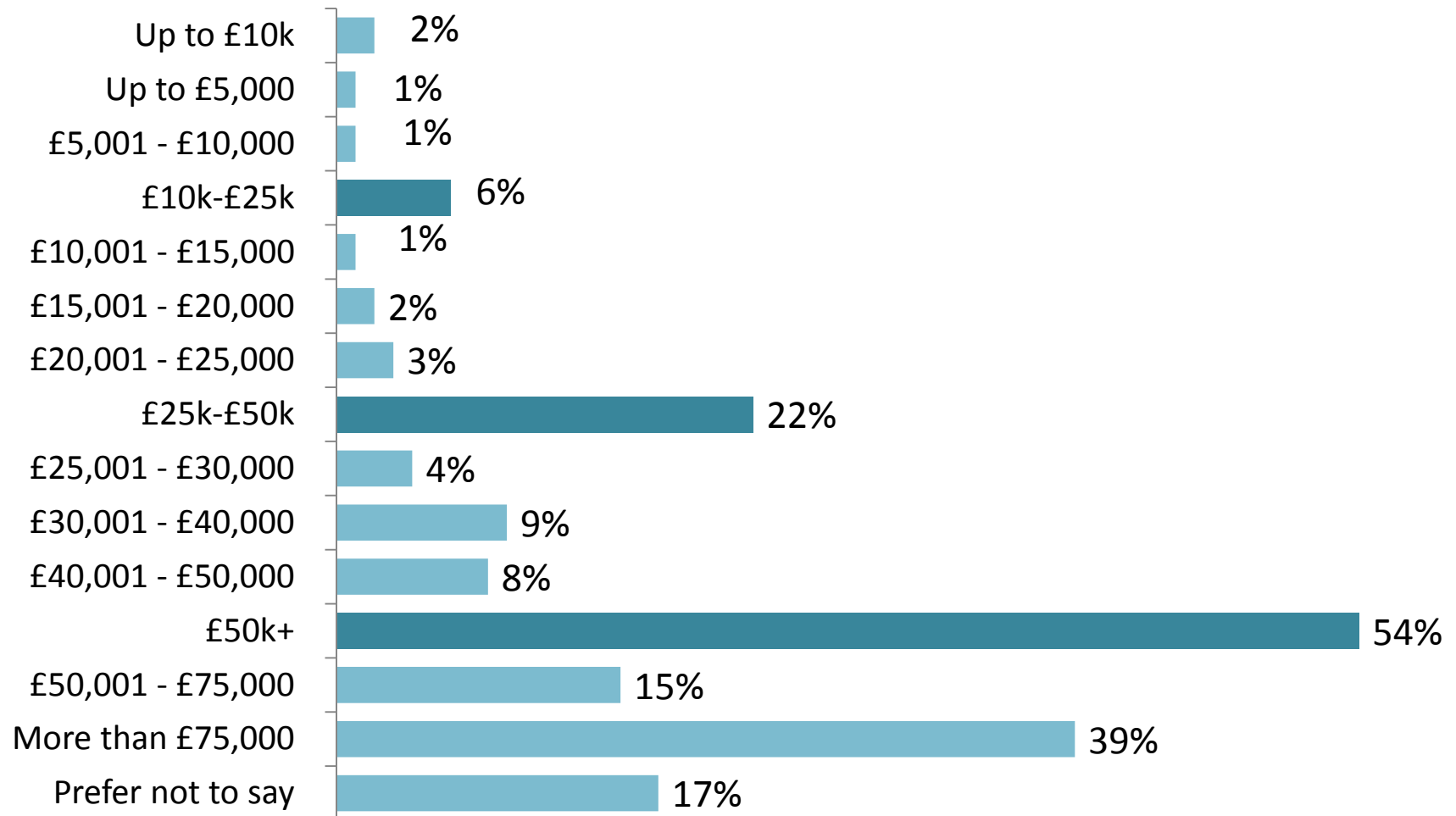
Region



Base: All members: 1,034 (665 for region)

Half of BCH users have a household income of over £50,000

Q Please indicate your approximate annual household income, before tax and other deductions



Base: All members: 2,652

Weighting – our approach

OVERALL

Members and casuals data were weighted to match the population split between members and casual usage in the combined data (usage figures provided by TfL)

CASUALS

- Casual users were interviewed when docking a bicycle. In order to obtain sufficient interviews for analysis we had to interview at the busiest docking stations (DS).
- This approach was pragmatic, but would not give representative results
- To improve the representativeness of the casual results:
 - We weighted casual interviews by DS to match the population of casuals users docking bicycles at each DS (usage figures provided by TfL)
 - In order to minimise the design effect of this approach, some DS were merged where only a handful of interviews were achieved - to avoid excessive weighting of a small number of interviews
 - We also weighted weekend and weekday usage to match the population proportions as the unweighted data showed significant differences in the KPI results between weekend and weekday users.

MEMBERS

- Members data was left unweighted as there was no practical population data to use as a weighting target
- Members data from 2010 was also unweighted so results are comparable

