



Barclays Cycle Hire customer satisfaction and usage survey: Wave 3 Members Only Results

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Today's presentation...

1. Survey methodology
2. Key findings
3. Key measures
4. Satisfaction with Barclays Cycle Hire
5. Drivers of satisfaction and recommendation
6. General attitudes to Barclays Cycle Hire

1. Survey methodology

Methodology and approach

- 947 interviews completed online
- 24-31 October 2011

2011			
January	February	March	April
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September	October	November	December
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- 7,984 invites sent - response rate of 12%
- Active only members invited to take part
- Sample was taken from TfL's database of registered users
- Data is unweighted

Transport for London Ipsos MORI

0% 25% 50% 75% 100%

USING BARCLAYS CYCLE HIRE

Taking everything into account, how satisfied are you with your overall experience of Barclays Cycle Hire? Please give your answer on a scale from 0 to 10 where 10 is extremely satisfied and 0 is extremely dissatisfied.

Please give your answer on a scale from 0 to 10 where 10 is extremely satisfied and 0 is extremely dissatisfied.

Extremely dissatisfied 0 1 2 3 4 5 6 7 8 9 10 Extremely satisfied

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How satisfied are you with the availability of bicycles at docking stations, on a scale from 0 to 10 where 10 is extremely satisfied and 0 is extremely dissatisfied?

Please give your answer on a scale from 0 to 10 where 10 is extremely satisfied and 0 is extremely dissatisfied.

Extremely dissatisfied 0 1 2 3 4 5 6 7 8 9 10 Extremely satisfied

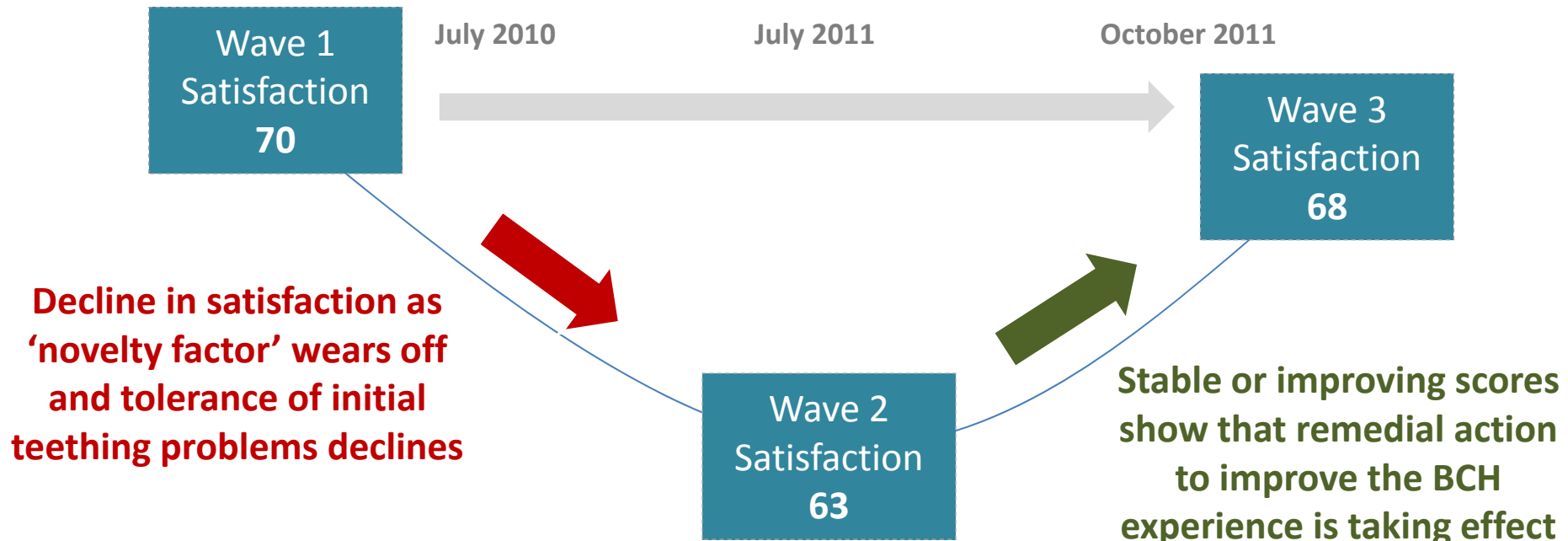
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2. Key findings

Key headlines

- Overall satisfaction and advocacy have increased
 -although not quite back to wave 1 levels
- Satisfaction with the ease of using the membership key is the most improved touchpoint
- Satisfaction with the working condition and general maintenance of the docking station has also improved by three points since wave 2 to 70



Where to focus? – availability of bicycles OR
availability of docking points



They are the lowest performing touchpoints –
both have below average satisfaction

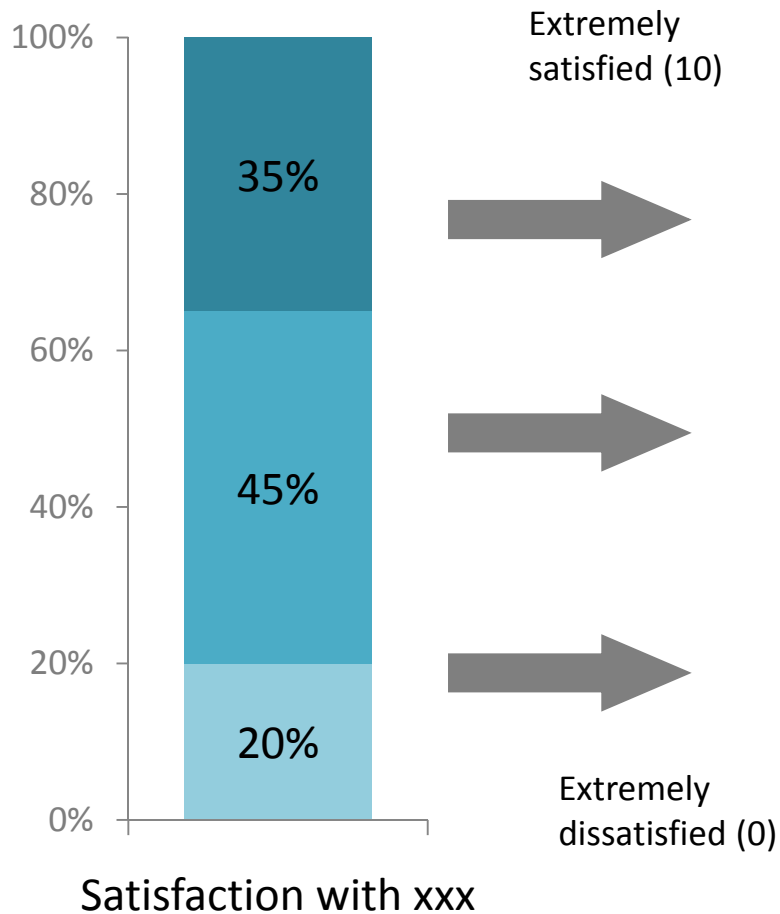
Both have a significant impact on overall
satisfaction and recommendation

**BUT availability of the bicycles has more of an
impact on overall satisfaction and should be the
primary focus**

3. 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



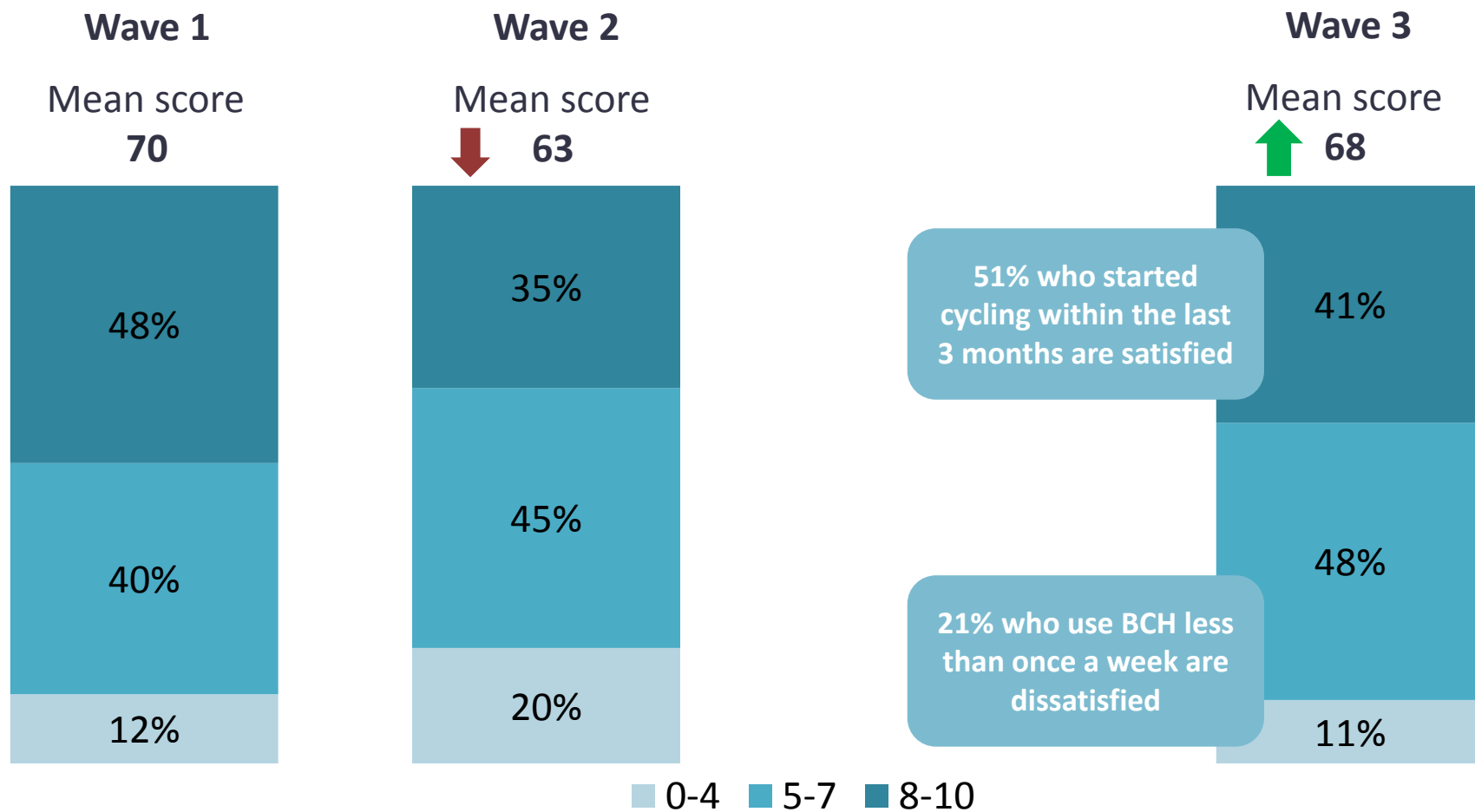
or



Indicates significant change in mean score since wave 1

Overall satisfaction has improved, but remains below wave 1

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



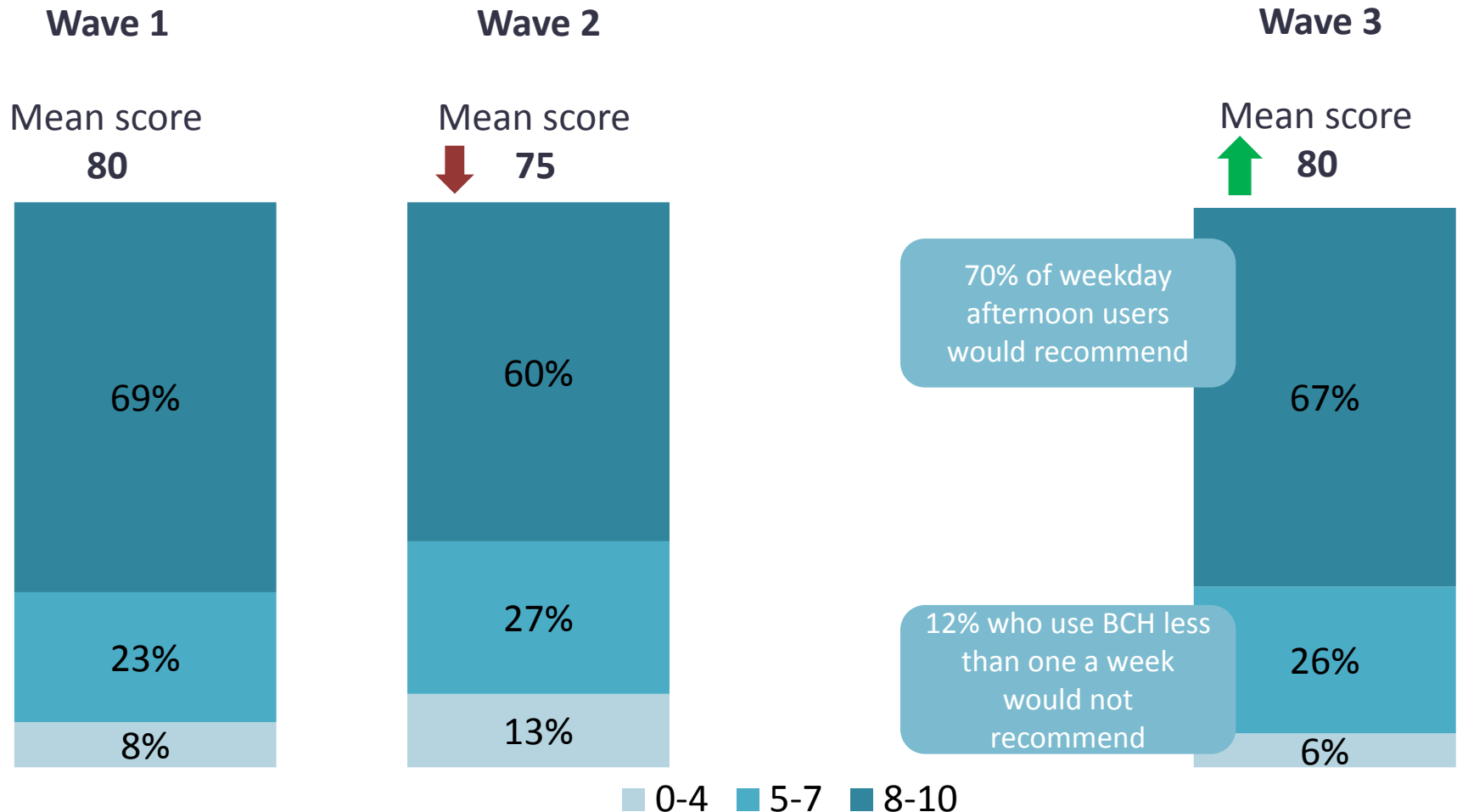
Other scores for comparison: Buses 80¹ LU 79¹ London Overground 82¹ Car 72² Cycle 67²

Source: ¹ TLRN user CSS and modal CSS surveys qtr1 (April – June); ²TLRN Autumn 2010

Ipsos MORI Base: All members: W1: 3,754, W2: 2,652; W3: 947

Advocacy has also improved but top box scores remain marginally lower than wave 1 ¹¹

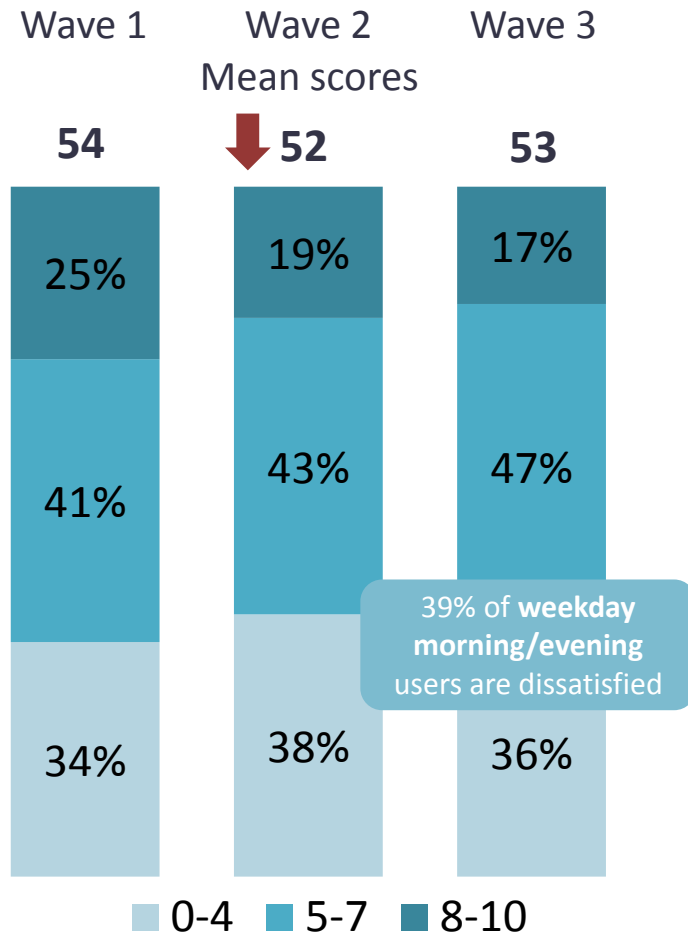
Q How likely would you be to recommend Barclays Cycle Hire to friends or family



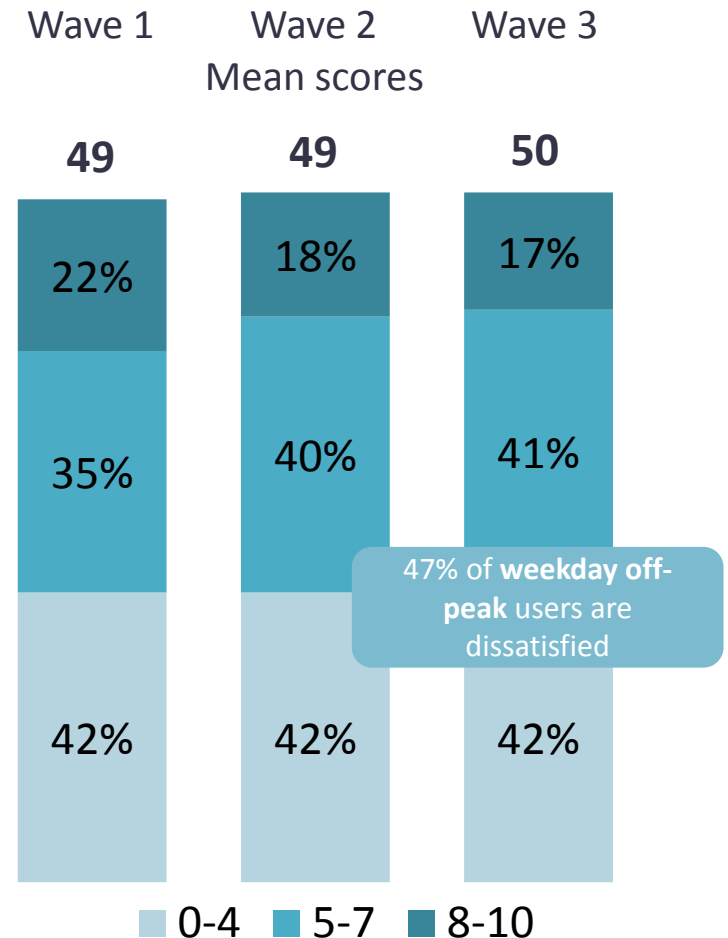
4. Satisfaction with Barclays Cycle Hire

In general, the proportion satisfied with availability of bicycles and spaces at docking stations remains lower than wave 1.....

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? *

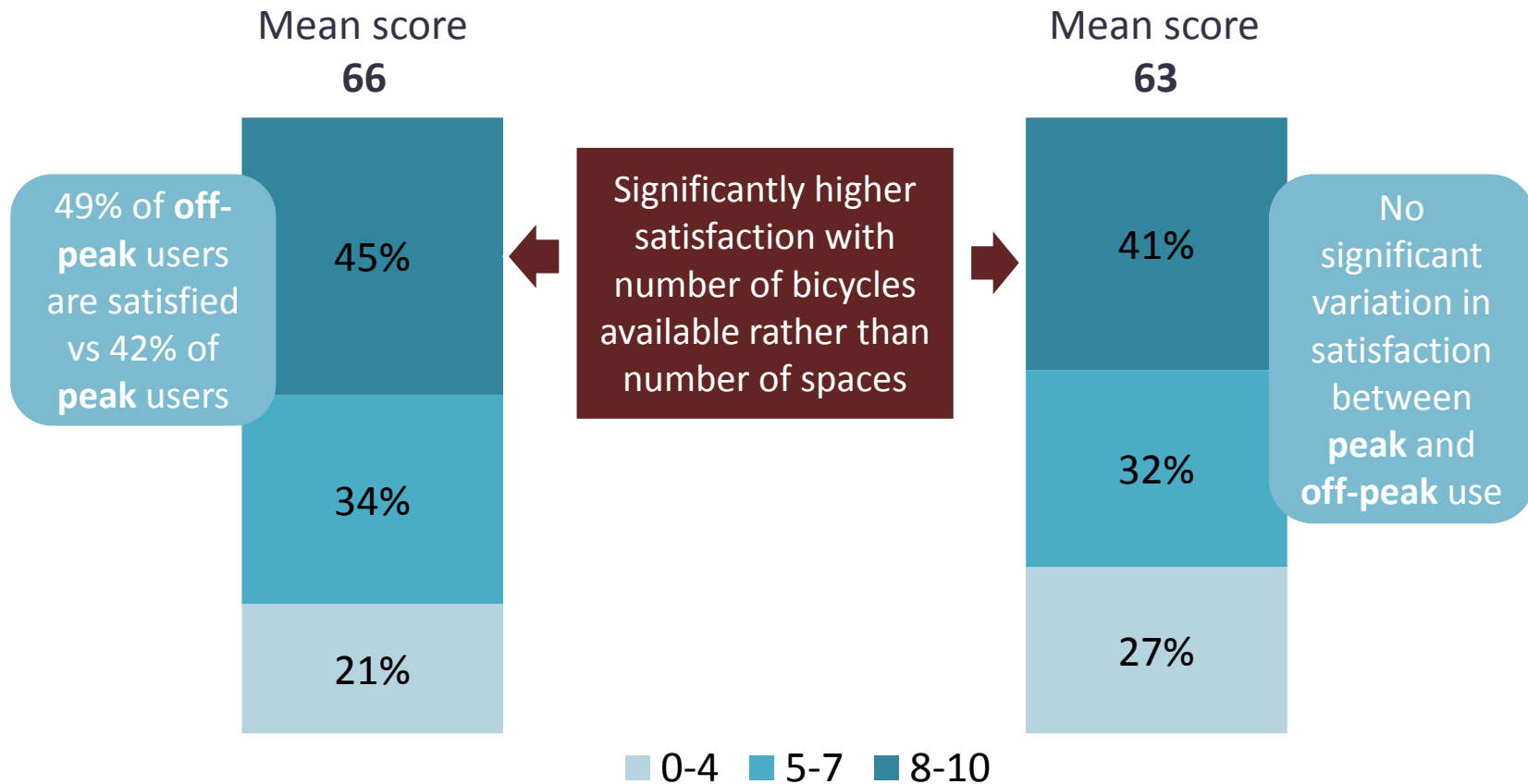


...but when asked about a specific trip, satisfaction scores are higher

Q Still thinking specifically about this most recent trip using Barclays Cycle Hire, how satisfied are you with the following on a scale of 0 to 10 where 10 is extremely satisfied and 0 is extremely dissatisfied?

The number of bicycles available to hire at docking stations

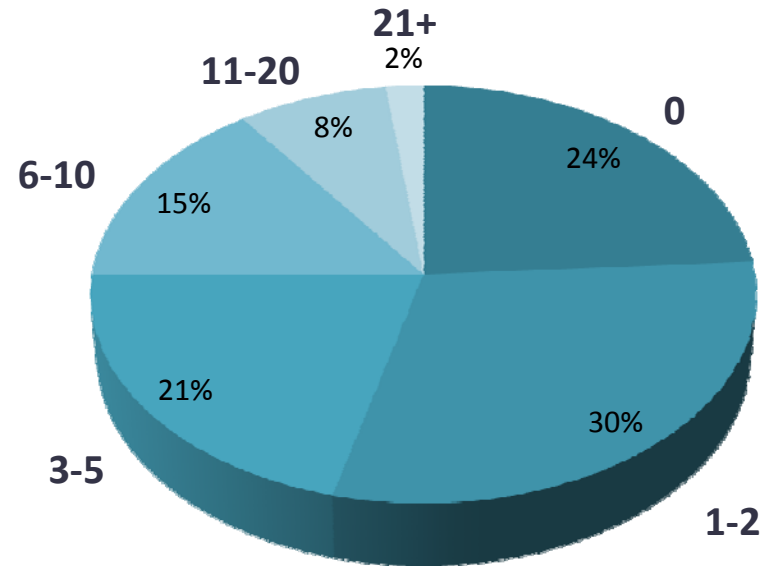
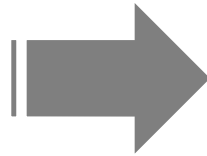
The number of available spaces to return bicycles at docking stations



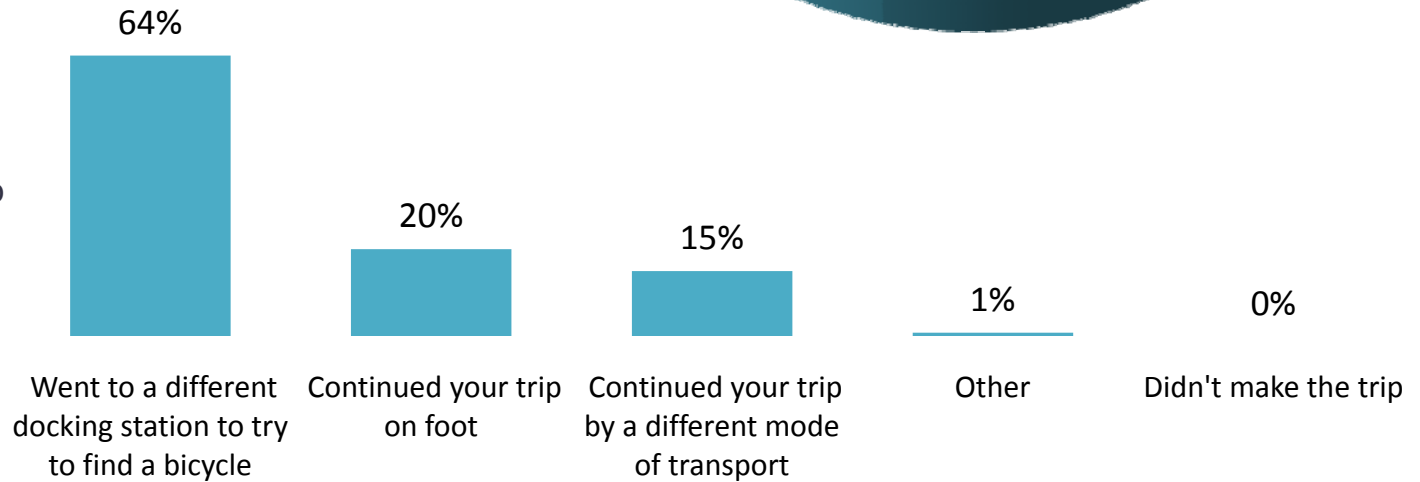
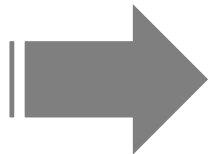
Only a quarter have never failed to find a bicycle at their first chosen docking station

851 members
attempted to hire
a bike in the last
month

Q On how many of these occasions have you **failed** to find an available bicycle at your first choice of docking station?



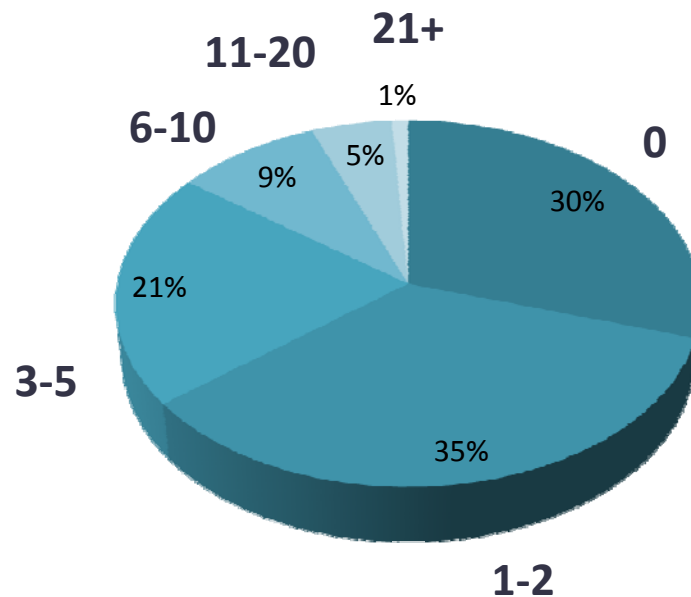
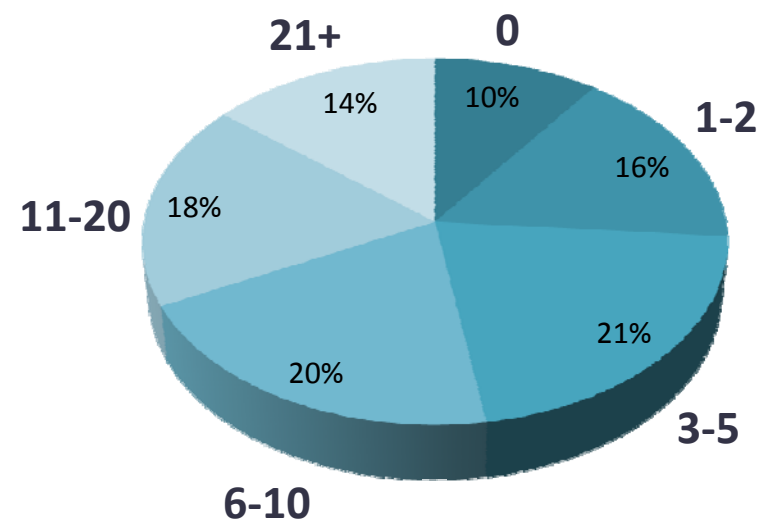
Q The last time you failed to find an available bicycle at your first choice of docking station, what did you do next?



One-in-ten have not hired a bicycle successfully in the last month

Q How many times in the last month have you successfully hired a bicycle using the Barclays Cycle Hire Scheme?

Q On how many of these occasions have you failed to find an available space to return the bicycle at your first choice of docking station?



6% of **weekday morning users** have not hired successfully in the last month

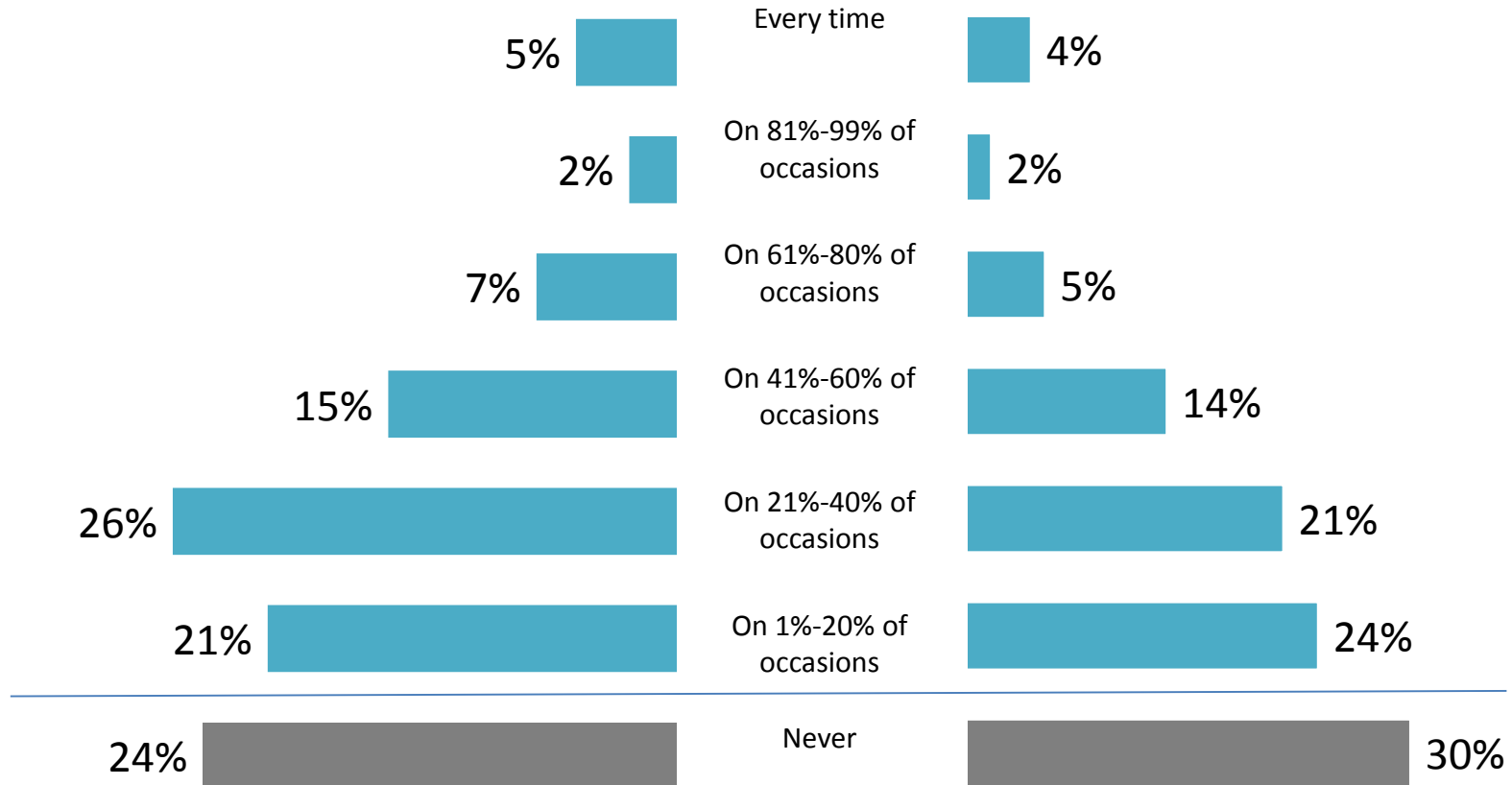
Satisfaction is significantly higher among members who have hired successfully in the last month than those who haven't

32% of **weekend users** have never failed to find a space

Failure to find bikes more frequent than failure to find docking points

Proportion of attempts that users have failed to find an available bicycle at their first choice of docking station?

Proportion of attempts that users have failed to find an available space to return the bicycle at their first choice of docking station

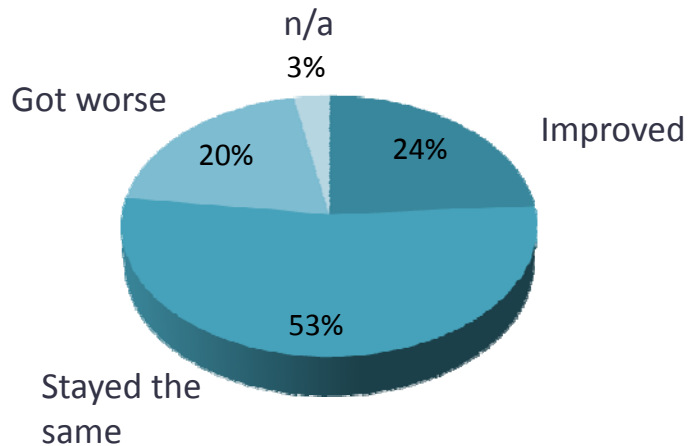


Base: All who hired a bicycle at their first choice of docking station in the last month: 851; all who failed to find a space at their first choice of docking station in the last month: 850

About half think availability of bicycles and docking points has stayed the same

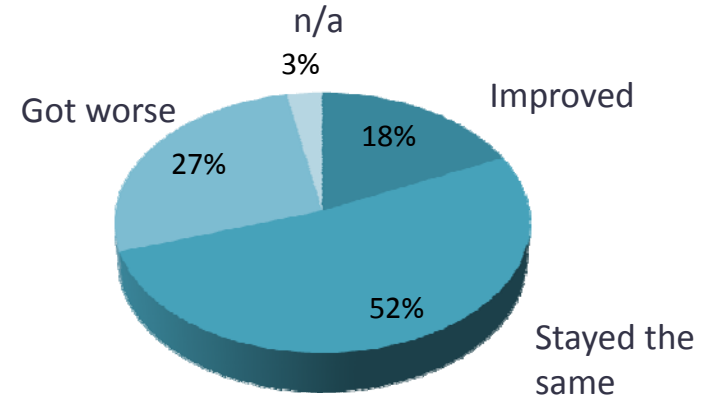
Q Thinking specifically about the following areas, generally would you say things have improved, stayed the same or got worse

The availability of bicycles at docking stations



62% who started using BCH within the last 6 months say availability of bicycles

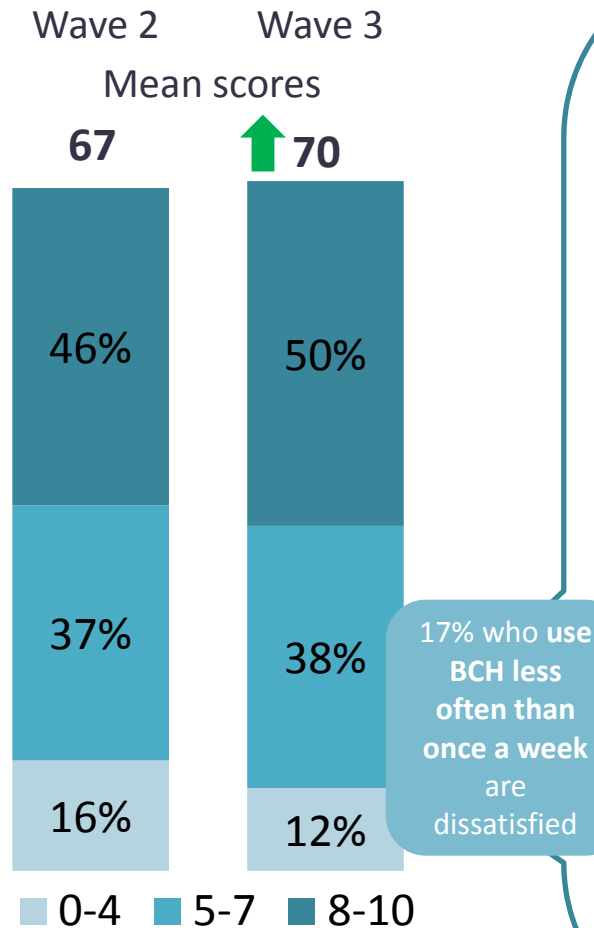
The availability of free docking points



29% of **weekday afternoon** users and 30% of **weekday off-peak** users say availability of free docking points has got worse

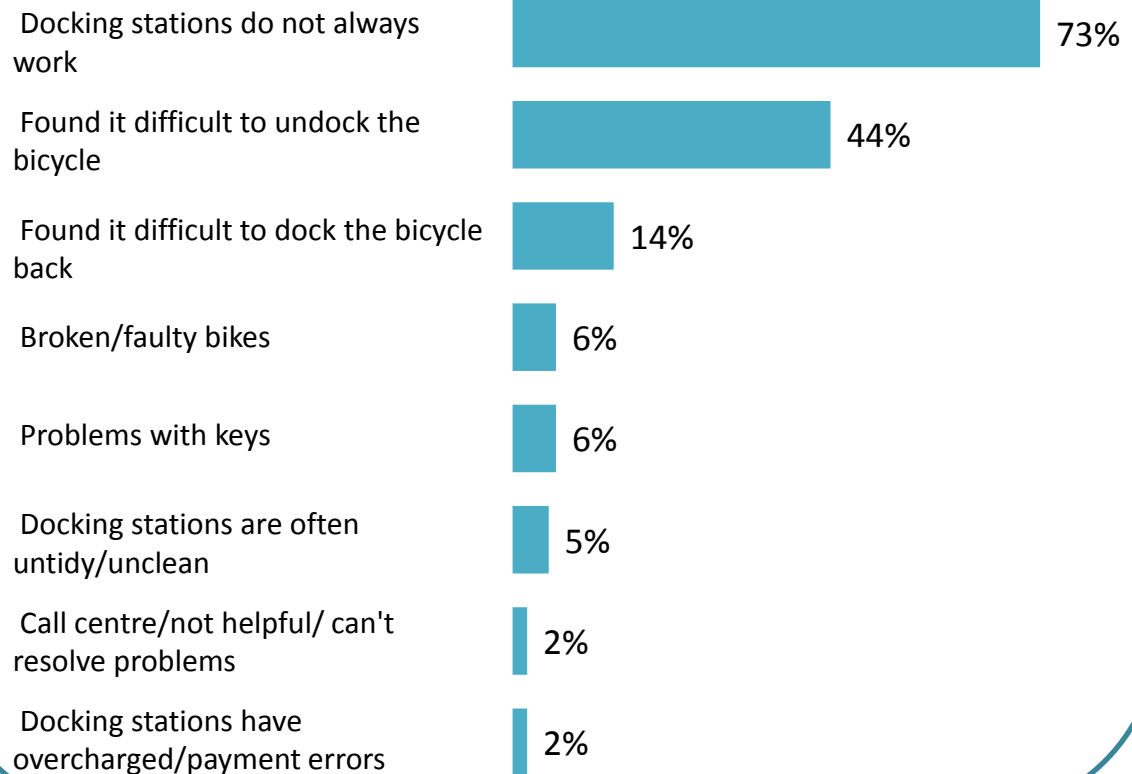
Small growth in satisfaction with general maintenance and working condition of docking stations

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



(Asked of 265 rating 0-6)

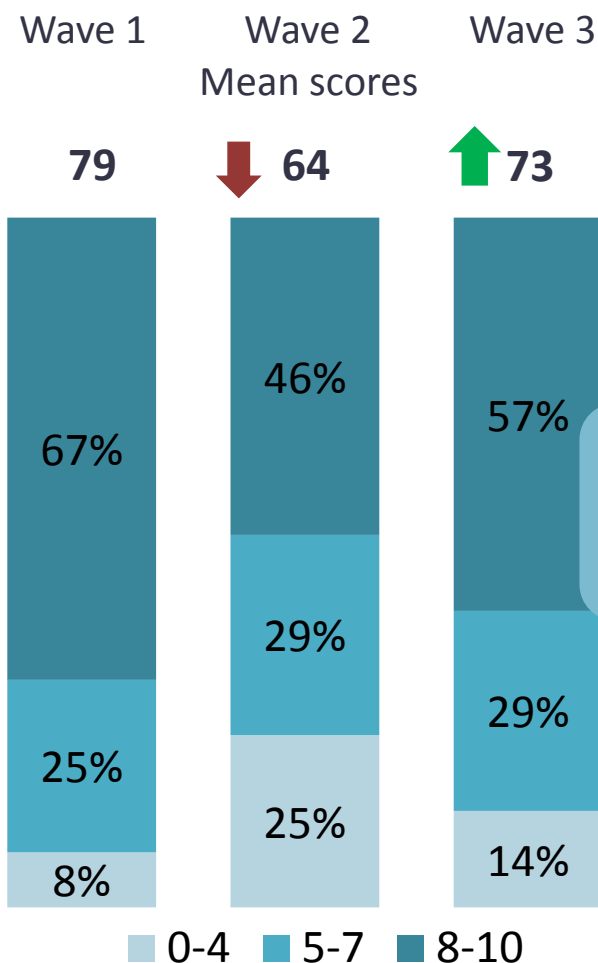
Q Why do you say you are not satisfied with the working conditions and general maintenance of the docking stations? (Mentions above 1%)



Satisfaction with ease of using the membership key has improved significantly....

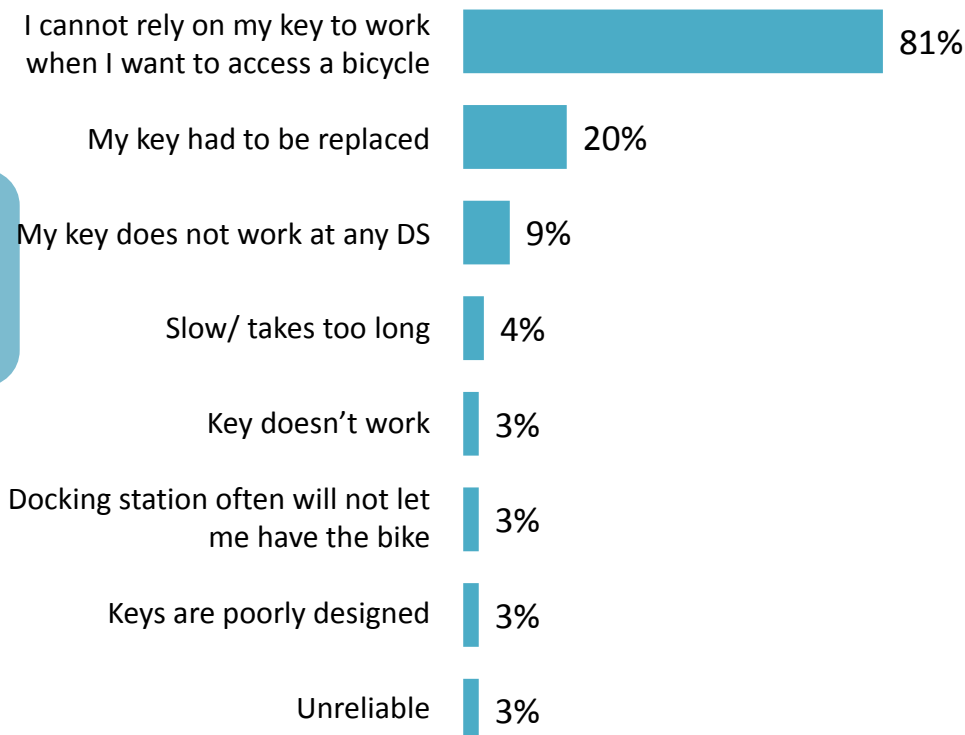
20

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



63% of
weekday
morning
users are
satisfied

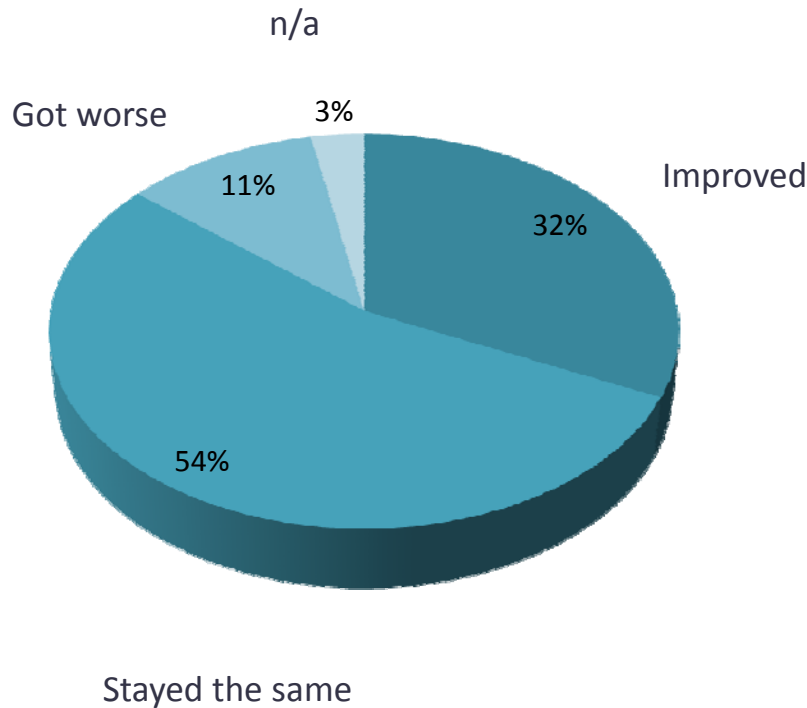
(Asked of 257 rating 0-6)
Q Why do you say you are not satisfied with the ease of
using the membership key to access a bicycle?
(Mentions above 1%)



...but over half think their membership key working at the docking point has stayed the same

Q Thinking specifically about the following areas, generally would you say things have improved, stayed the same or got worse

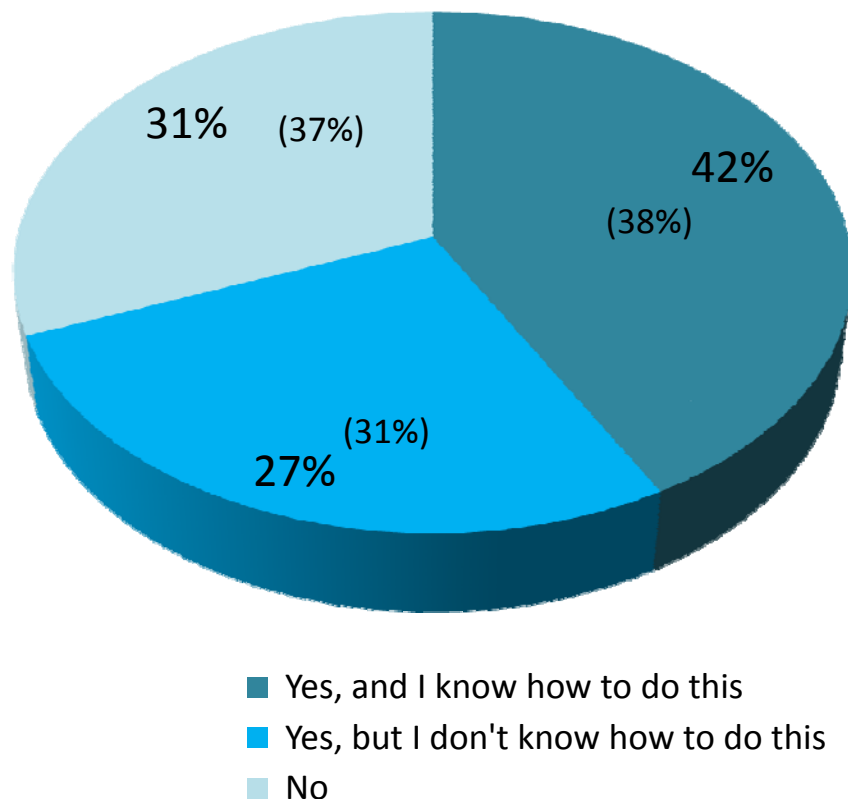
Your membership key working at a docking point



37% of **weekday morning** and 35% of **weekday afternoon** users say the membership key working has improved

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?



44% of **weekday afternoon** users know how to do this



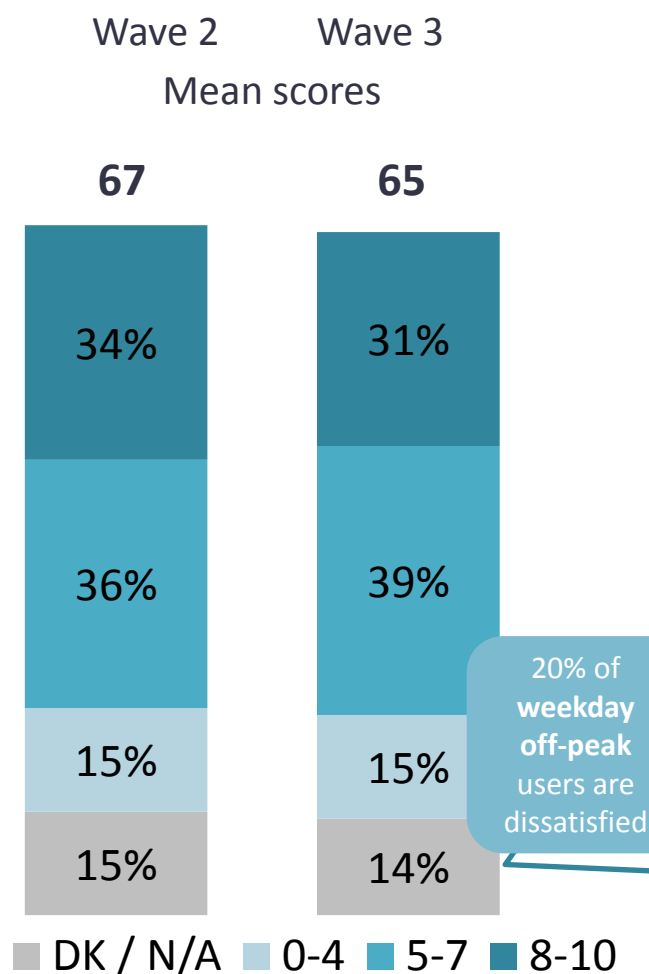
45% of **weekday-off peak** users know how to do this



37% who use BCH **less than once a week** are not aware of this

Ease of use a cause of dissatisfaction with the terminal

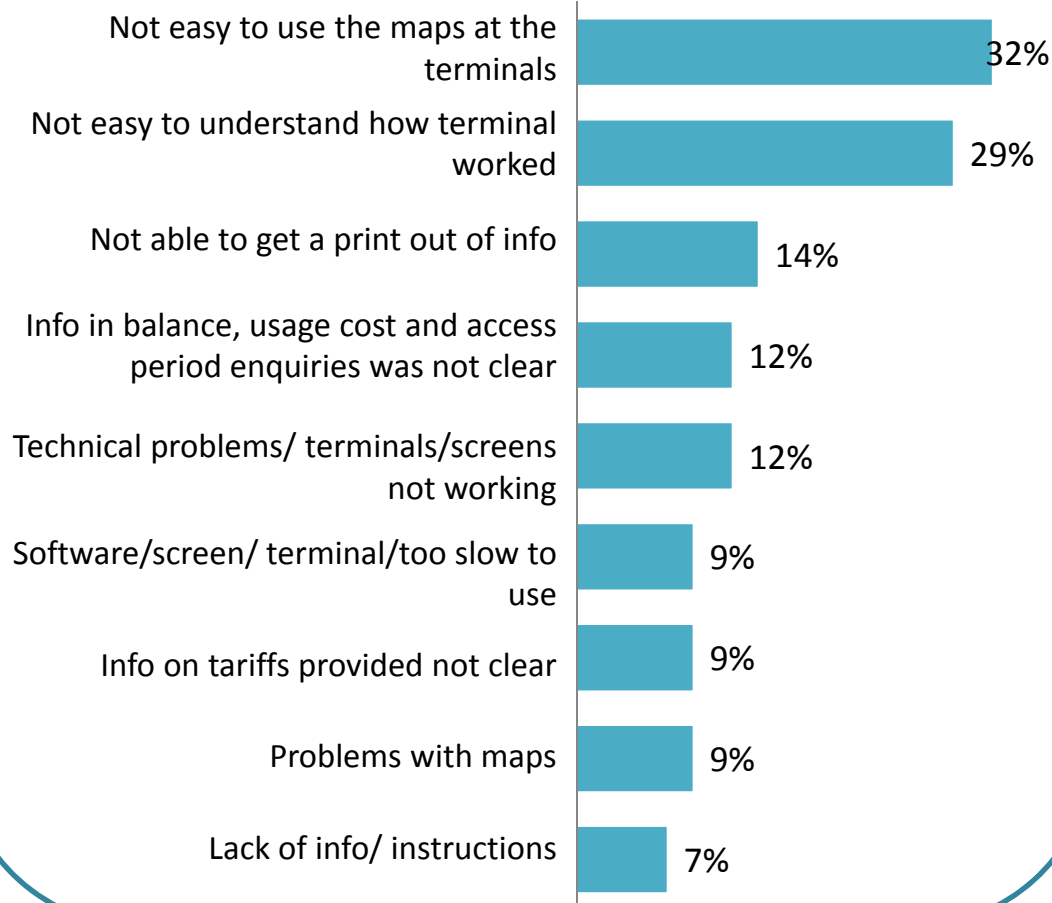
Q How satisfied are you with the information panels, print outs, screens and ease of using the terminals?



20% of
weekday
off-peak
users are
dissatisfied

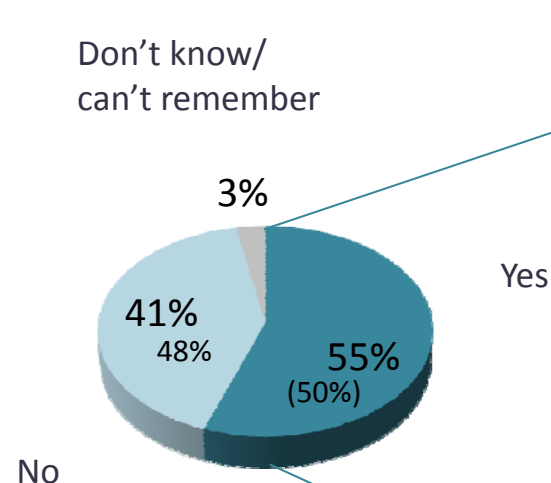
(Asked of 340 rating 0-6)

Q Why do you say you are not satisfied with the terminals? (mentions over 6%)



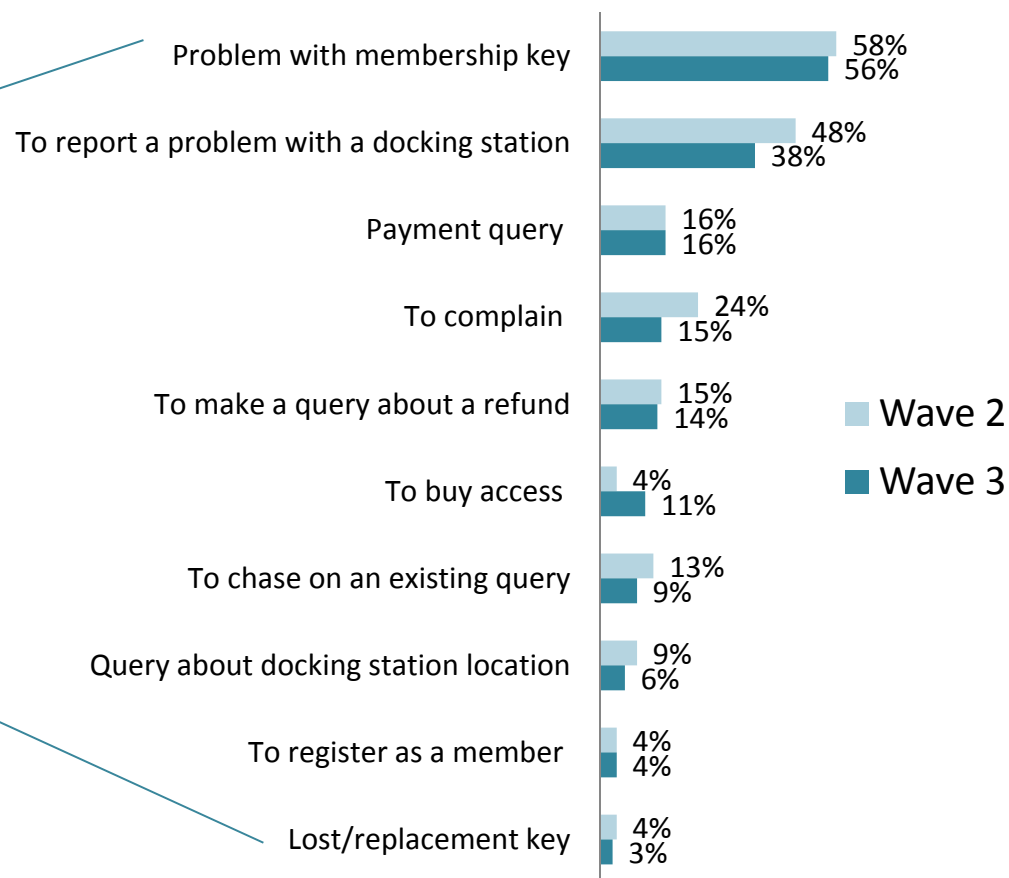
Over half have contacted the BCH contact centre in the last two months

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



66% who use BCH less than once a week made contact about a problem with the membership key;
42% who use BCH at least once a week made contact to report a problem.

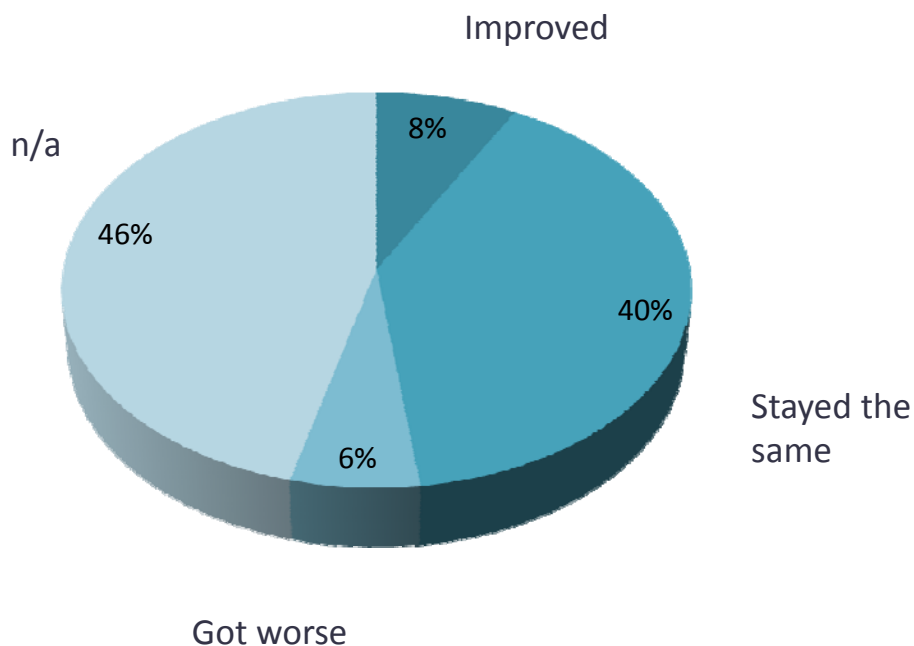
(Asked of 525 that contacted the centre in the last 2 months)
Q Thinking about the last time you contacted the centre, what was the reason or reasons? (Mentions above 3%)



Two-fifths think call centre responsiveness has stayed the same

Q Thinking specifically about the following areas, generally would you say things have improved, stayed the same or got worse

Call centre responsiveness (i.e. not setting up a call back)



9% of **weekend users** think call centre responsiveness has got worse



Men are **more** likely than **women** to think call centre responsiveness has got worse (7% vs 3% respectively)

Speed, convenience and fun are key reasons for positive experience

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

I think this is an amazing scheme. As a person who lives in central London without a secure place to store a bike and with no car it gives me the ability to get quickly from A to B without having to pay for buses or tubes, which are too expensive for short journeys.

- 19% - faster
- 11% - convenient
- 9% easy to use

Gives freedom getting around central London at low cost, makes it easier to get to certain locations, offers an alternative to tube or bus.

- 8% - alternative public transport
- 7% - enjoyable, it's fun
- 4% - best way to get around London

Q Why do you say that [you are likely to use BCH again]?

Cycling is enjoyable and the best way to commute around London.

- 15% - enjoyable, it's fun
- 7% - best way to get around London

It's an excellent scheme. It's cheap, it's convenient, it's fast, and it's flexible. The annoying things about it are massively outweighed by the benefits.

- 14% - convenient
- 8% - cheaper
- 7% - effective service

Availability, convenience and bicycle issues main reasons for bad experiences ²⁷

Q And what was particularly bad about your experience?

Issues regarding "tidal" flow not properly dealt with. E.g. in the mornings, hard to find docking stations available in the City, as most are full. And in the evenings hard to find bikes in City or West End, and hard to find docking points free near stations or in residential areas.

- 32% - availability
- 30% - convenience

Bikes are too heavy. Not enough gears. Breaks are not sharp enough. Bikes are not maintained well enough (damage to wheels etc).

- 27% - bicycles

Q Why do you say that [you are unlikely to use BCH again]?

Availability of free bikes and free docking points is extremely poor at St. Pancras at rush hour.

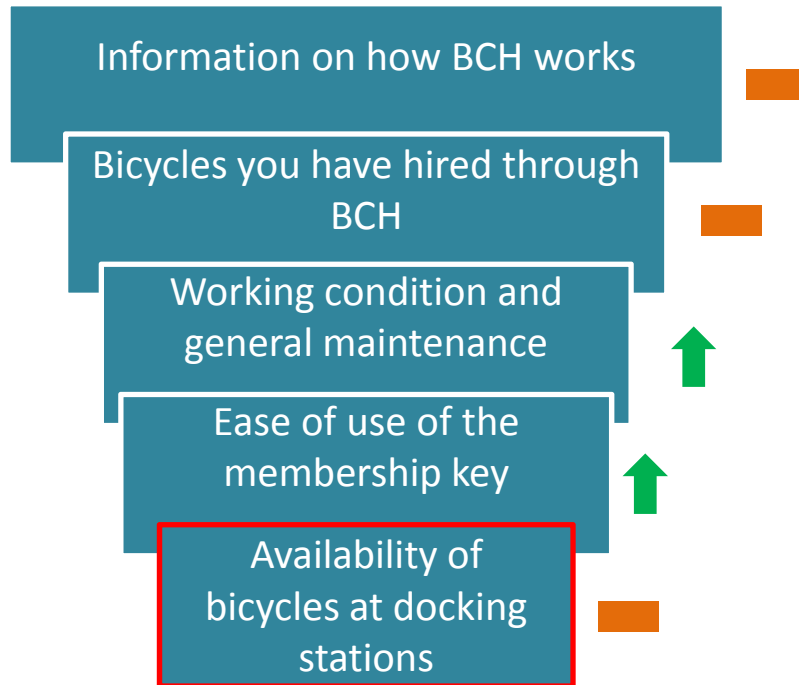
- 20% - poor availability of spaces at DS
- 16% poor availability of bicycles

5. Drivers of satisfaction and recommendation

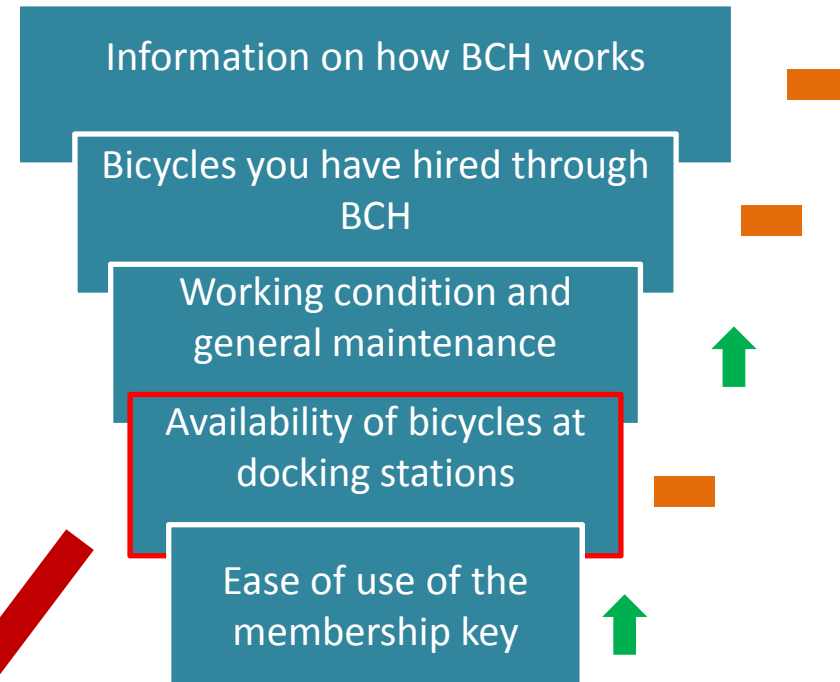
Top drivers of satisfaction and recommendation are the same (although the order is slightly different); priority area is also the same

Five touchpoints have **above average impact** on overall satisfaction and recommendation (in order of impact; i.e. information on how BCH works has the biggest impact on both):

Satisfaction



Recommendation



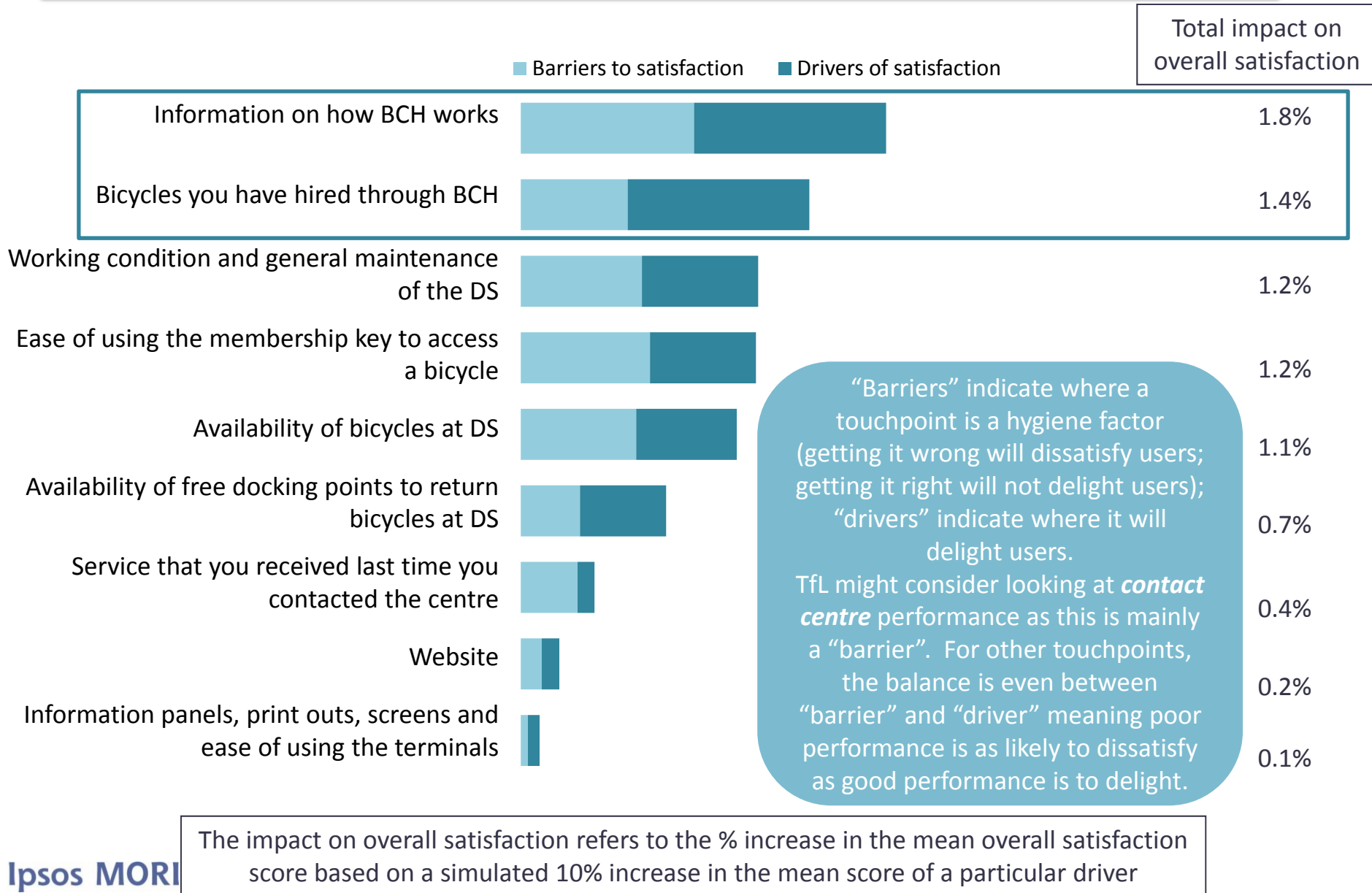
↑ Indicates increase in score vs last wave

■ Indicates no change in score vs last wave

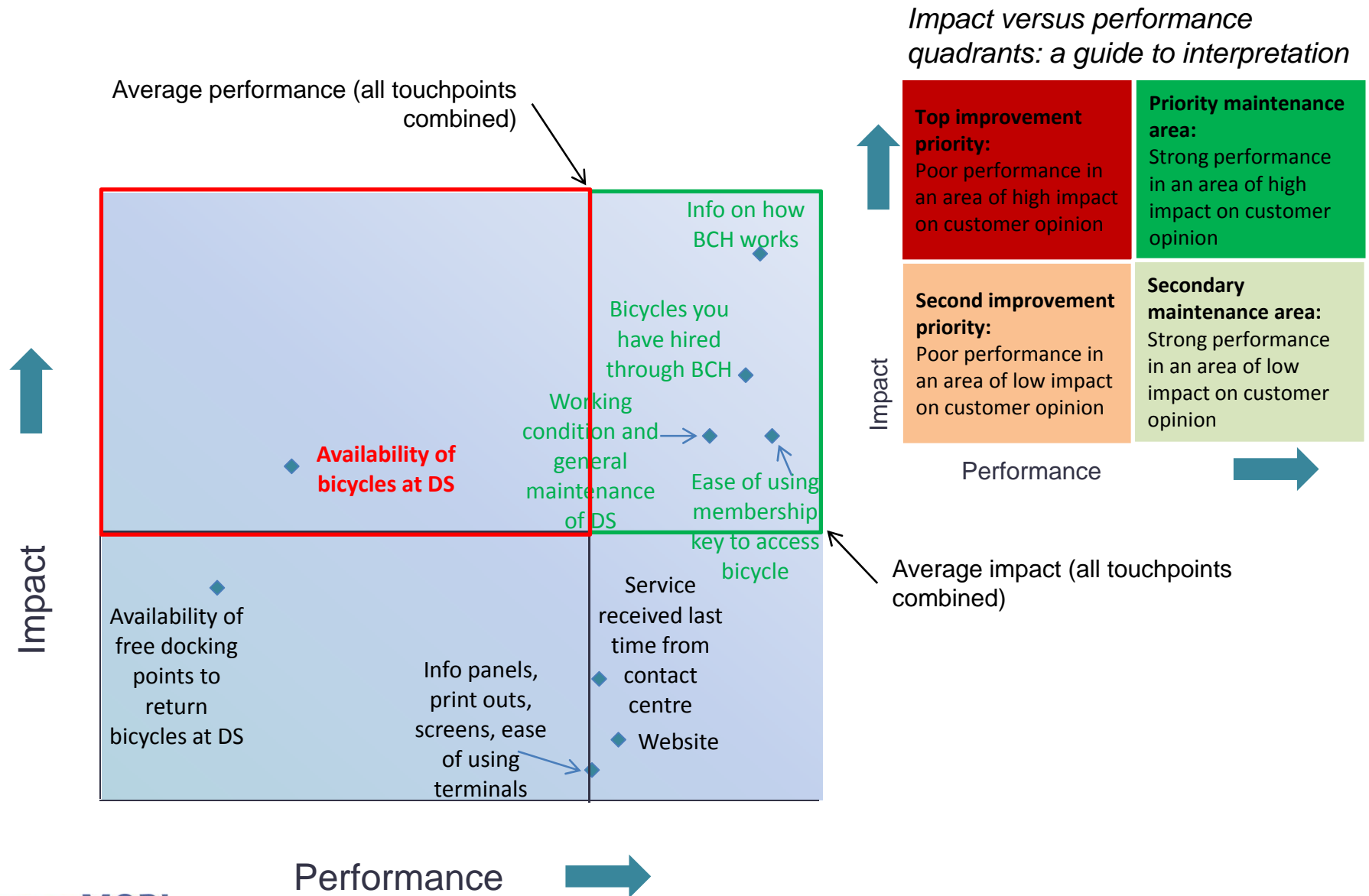
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Priority area for improvement for satisfaction and recommendation as performance remains below average compared to the other touchpoints

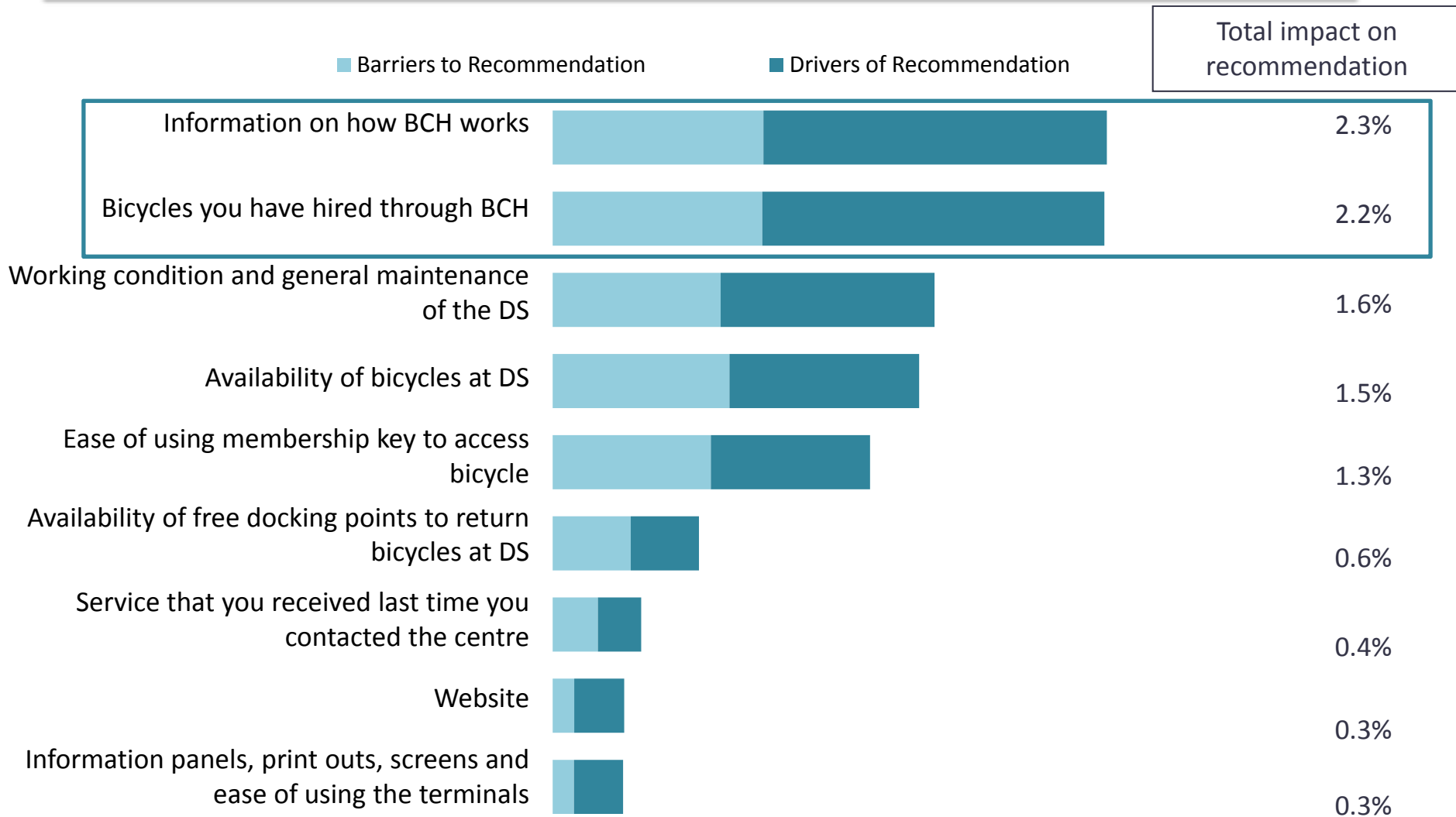
Overall satisfaction: information on how BCH works and the bicycles themselves have biggest impact



Overall satisfaction: availability of bicycles at DS is the main priority area for improvement for members

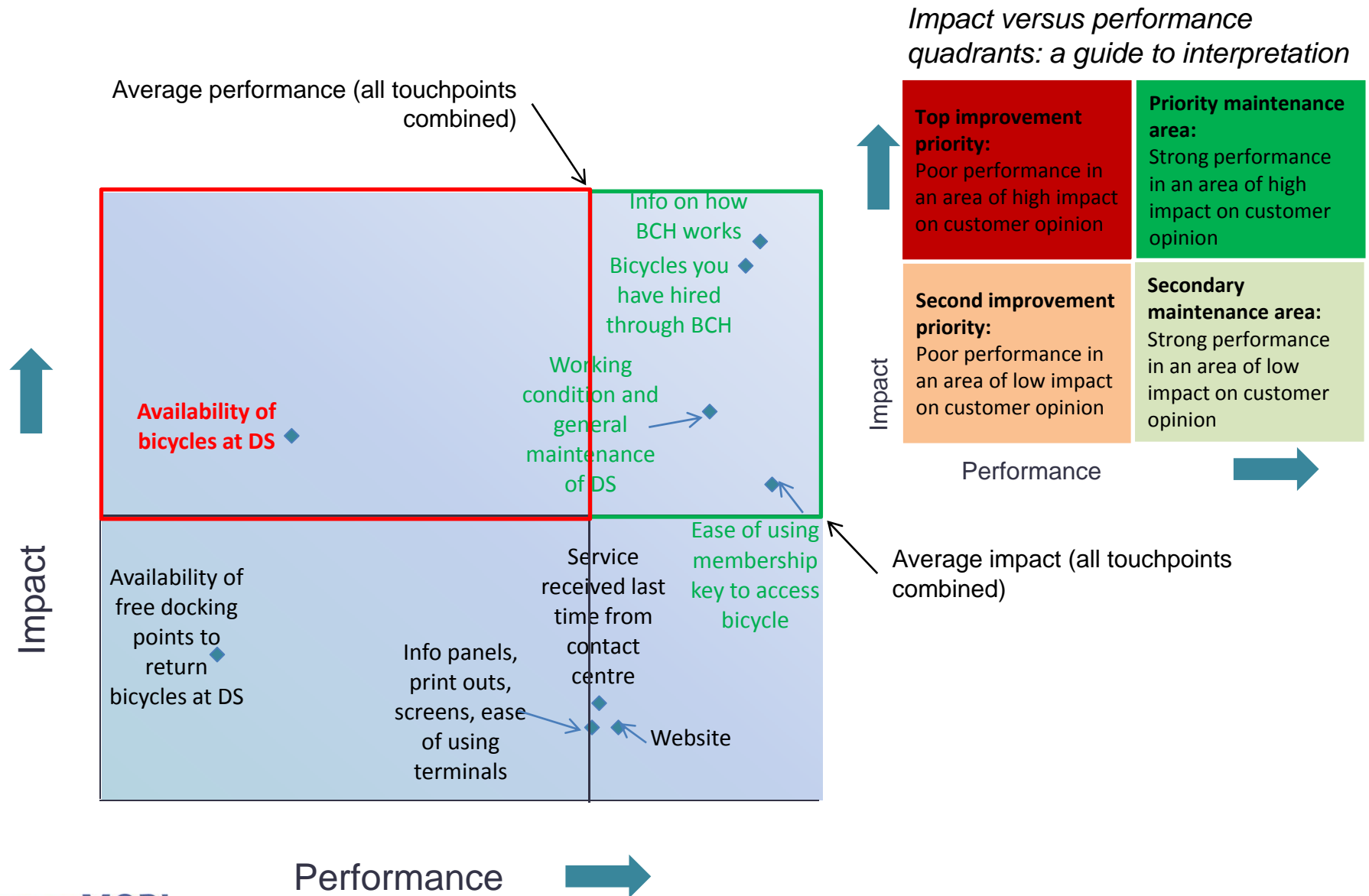


Recommendation: information on how BCH works and the bicycles themselves have biggest impact here too



The impact on recommendation refers to the % increase in the mean recommendation score based on a simulated 10% increase in the mean score of a particular driver

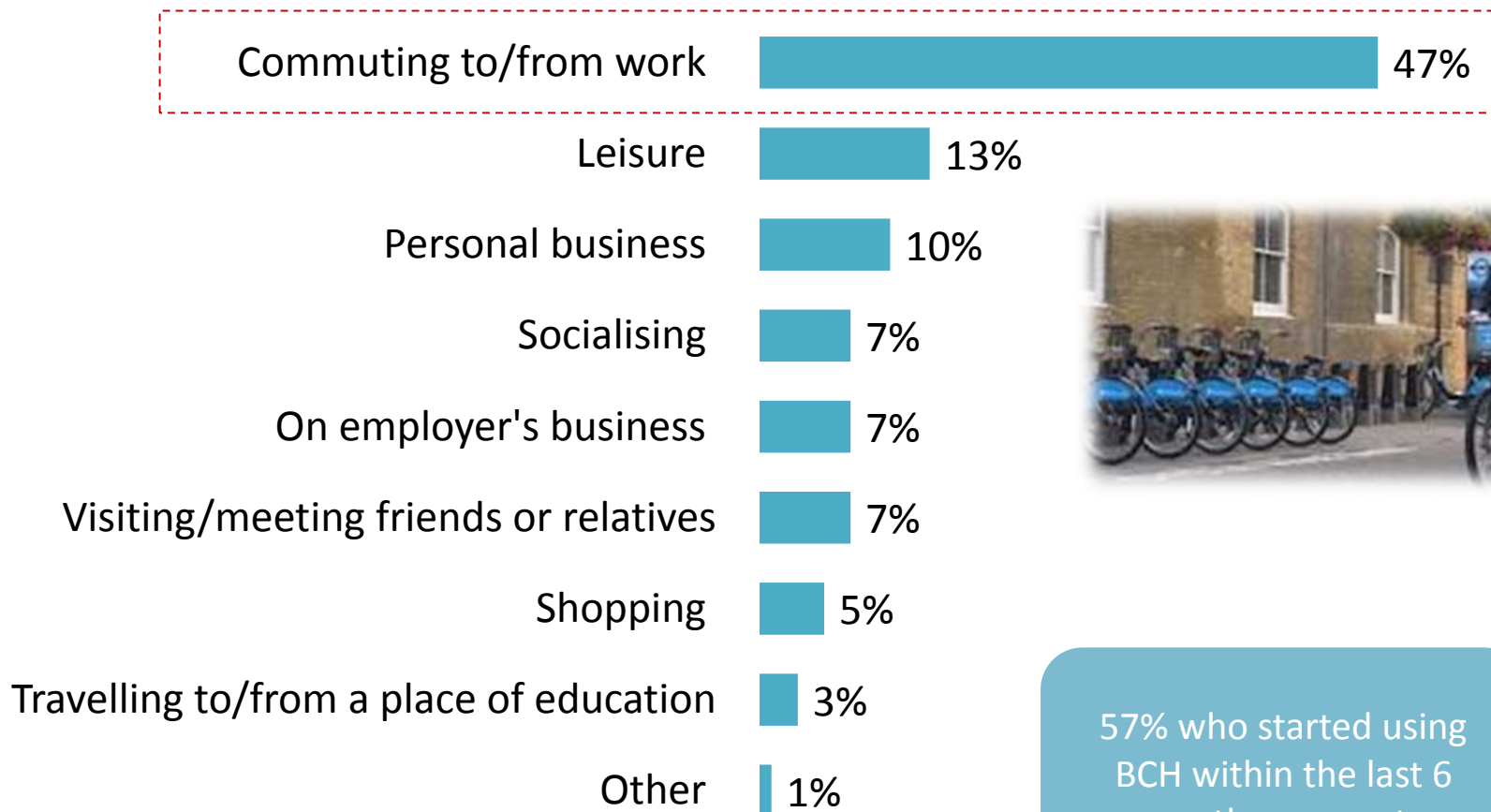
Recommendation: availability of bicycles at DS is the main priority area for improvement for members



6. General attitudes to BCH

Commuting is main purpose of trip for almost half

Q What was the main purpose of your most recent trip?



57% who started using
BCH within the last 6
months commute

Poor availability at docking stations affecting membership renewal

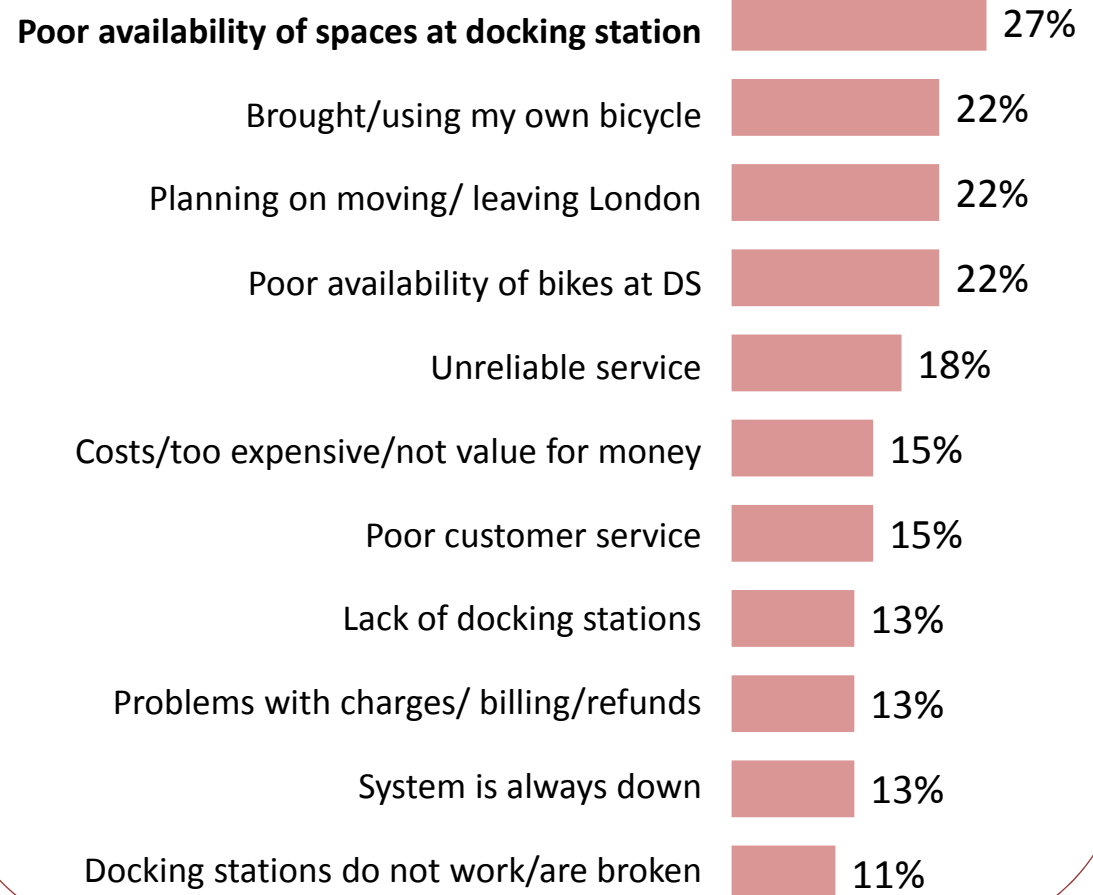
Q Thinking about your membership, are you intending to renew your membership when it runs out?

61% intend to renew their membership (54% in Wave 2)

6% do NOT intend to renew their membership (9% in Wave 2)

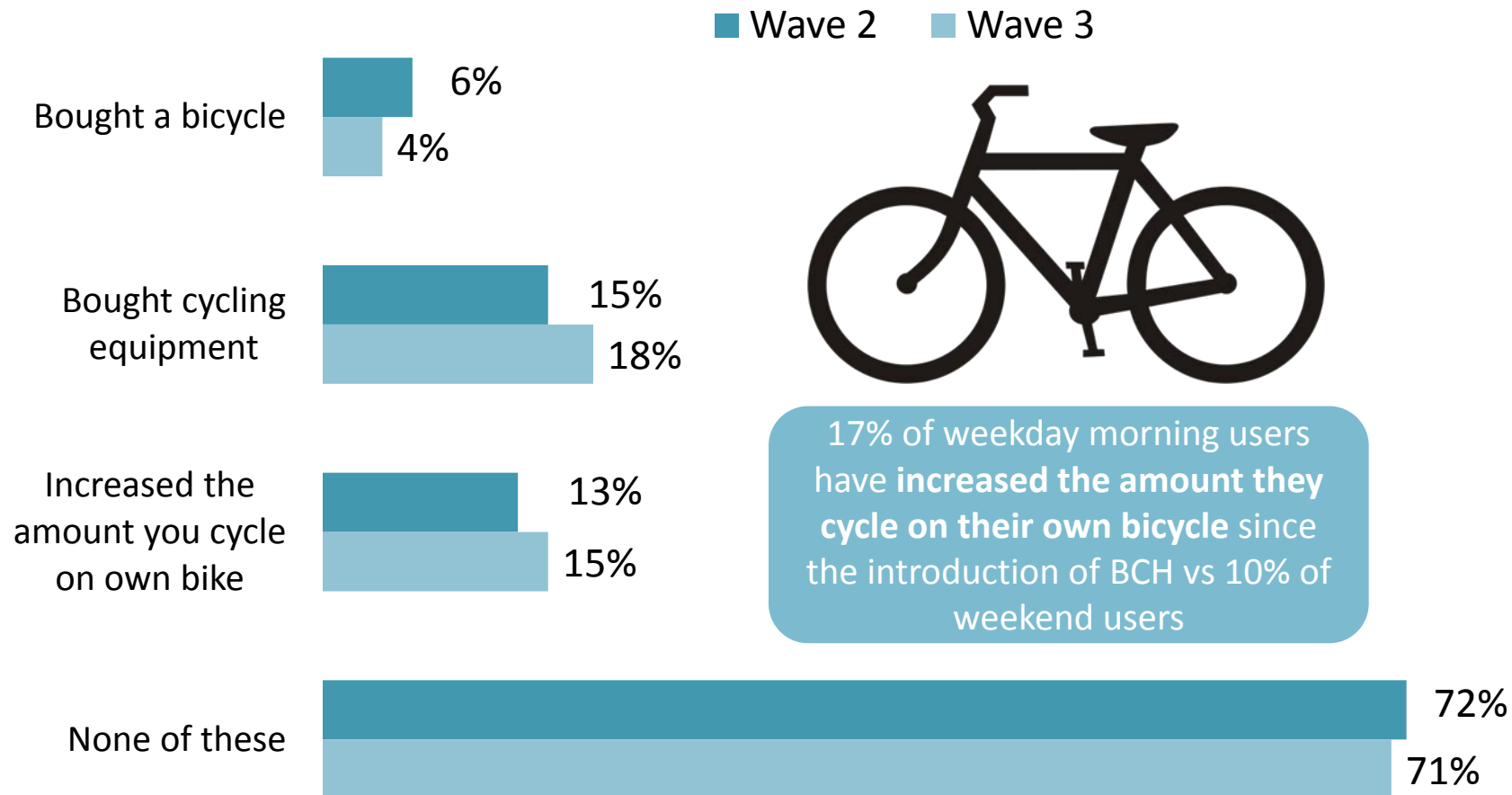
(Asked of 55 not intending to renew)

Q Why are you not intending to renew your membership when it runs out? (Mentions above 10%)



Nearly a fifth (18%) have bought cycling equipment 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?



Thank you