

**Barclays Cycle Hire customer
satisfaction and behaviour
Autumn 2010 (Wave 1 –
cycle hire members only)
10102
December 2010**

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What we will be covering today

1. Survey methodology
2. Key findings
3. Who is using the scheme and when
4. Overall attitudes to Barclays Cycle Hire
5. Key touch points of the scheme
 - 5.1. Information about the scheme
 - 5.2. The registration process
 - 5.3. The docking stations
 - 5.4. Bicycles
 - 5.5. Contact centre
6. Impact of the key touch points and areas to focus on
7. Travel behaviour change as a result of Barclays Cycle Hire
 - Travel patterns and change to travel

1. Survey methodology

Methodology and approach

All interviews were conducted online

- Customer Satisfaction Survey (CSS) fieldwork was carried out between 20 September and 4 October 2010
- Travel Behaviour fieldwork was carried out between 28 October and 4 November
- All data is un-weighted

Sample was taken from TfL's database of registered users

- All those invited to take part in the CSS survey had used the scheme at least once
- All CSS interviewees who agreed to be re-contacted were then invited to take part in the Travel Behaviour study
- A prize draw for the chance to win £250 was offered to encourage participation in the survey
- A profile of those who took part in the travel behaviour survey is shown in the Travel Behaviour section

3754 interviews were completed for CSS

1350 Interviews were completed for Travel Behaviour

- Just over 18,000 invitations were sent, giving a CSS response rate of 20%
- Of 2618 travel Behaviour invitations, the response rate was 52%

2. Key findings

Key findings – overall attitudes

- Overall satisfaction is fairly good - almost half are satisfied with the scheme – there is scope to improve, however...
 - Advocacy is much higher – more than two-thirds would recommend BCH to friends and family
 - 97% would be likely to use the scheme again (87% very likely)
- Six in ten Cycle Hire trips have replaced a public transport trip, four percent have replaced a car or taxi trip. Only 5 percent of trips were already cycled.
- The most popular reasons for using the scheme are that it is quicker, healthier and more convenient than other modes of transport
- The scheme has encouraged people who don't usually cycle in London to try it.
- A high proportion are satisfied with value for money of the BCH Scheme
 - Possibly linked to a high proportion of annual access and trips shorter than half an hour
- It's a positive picture in terms of the impact for London
 - 95% see it as making a positive contribution
 - Nine in ten consider it an alternative mode of transport

It's faster than other modes of transport, it's easy to use and it's fun

Docking stations are full, lack of bicycles, issues with other road users and problems with using the docking stations

Key findings – customer journey touch points

- Registration is not as smooth as it could be
 - Website is a key source of information but half experienced technical issues
 - Information surrounding fees and additional keys is confusing
- Quarter of members are dissatisfied with docking stations
 - Either full, so unable to dock their bicycles
 - Or empty, so no bicycles available
- Over half are satisfied with the bicycles
 - Only a small proportion are dissatisfied (6%) despite over a quarter experiencing problems with the bicycles (gears, brakes or saddle)
- Key area for focus should be the docking station
 - This element of the experience is a key driver of overall satisfaction

Increased satisfaction
with the
docking station

Leads to

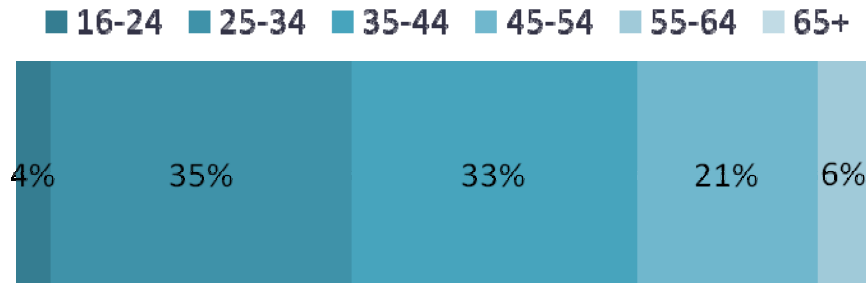
Increased overall
satisfaction

As this is a new scheme, and is seen as having many positives for both London and the individual, members may have been more forgiving of initial 'teething problems'. This tolerance is unlikely to last and it is important that highlighted issues are resolved so as not to impact scores in later waves

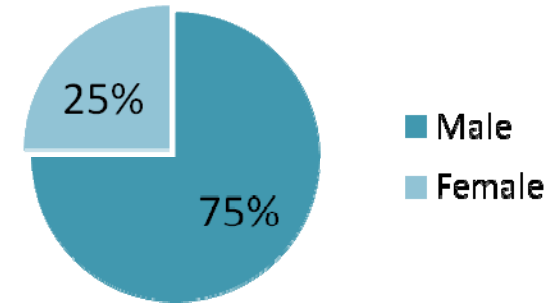
3. Who is using the scheme
and how often?

In line with existing cyclists in London, the majority of users are aged between 25 and 44, male, London residents, white ethnic origin and working

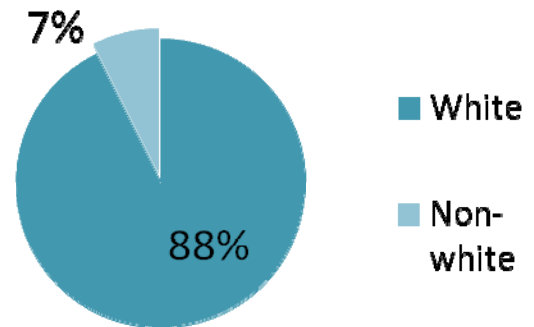
Age



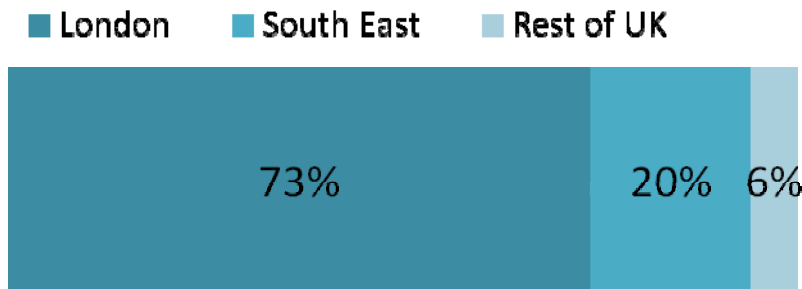
Gender



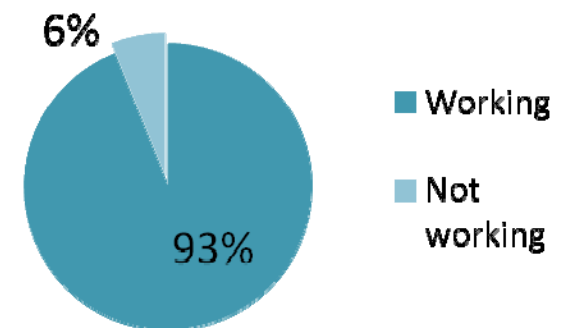
Ethnicity



Region



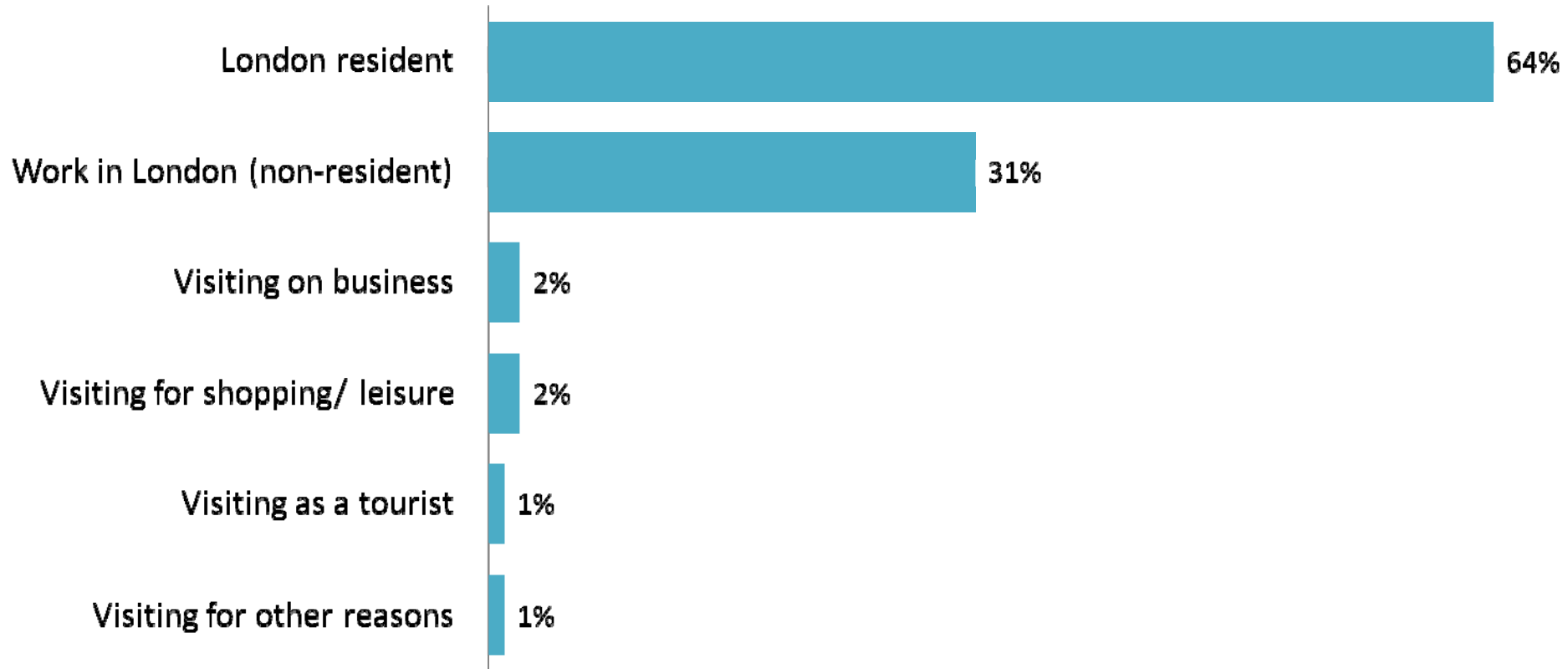
Working status



* 8 people from outside of the UK completed the survey. Data not shown in this chart as this represents less than 1% of the sample

Two thirds of users are London residents, with a further three in ten working in London

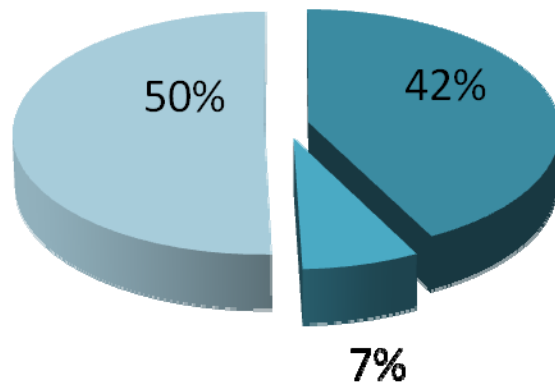
Q What was the main reason you were in London on the day you last made this trip using Barclays Cycle Hire?



Base: All users: 1350

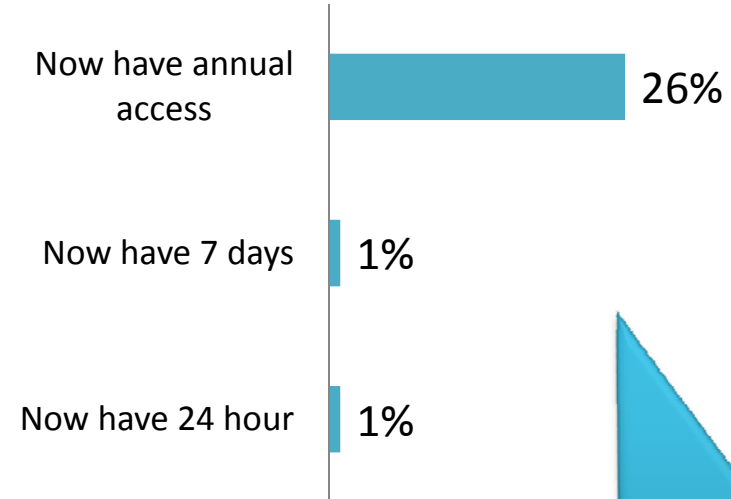
Half of users have annual access and a quarter of those who didn't have this originally have now changed access level

Q What access level did you have when you first registered for Barclays Cycle Hire?



■ 24 hours
■ Seven days
■ Annual

Q Do you now have a different level of access?



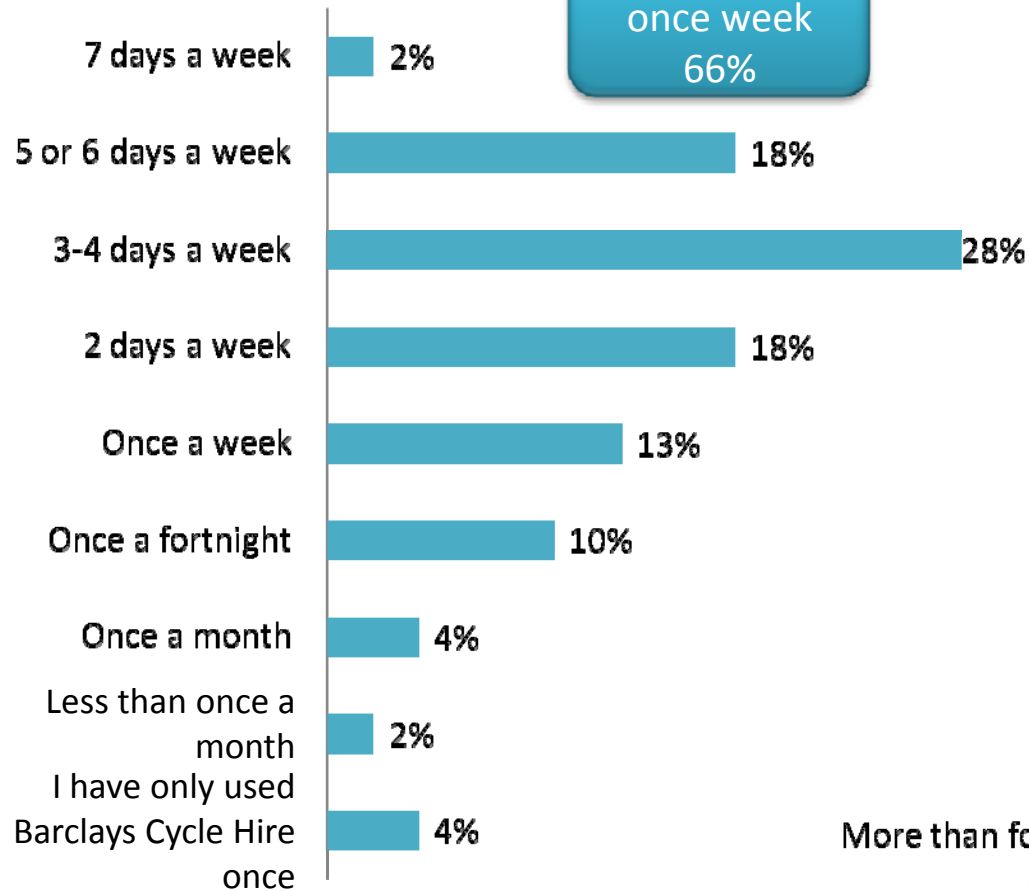
Amongst those with 7 day or 24 hour access when registering **28%** now have different level of access

Those who started cycling in London in the last 6 months are more likely to have moved to annual access (32%)

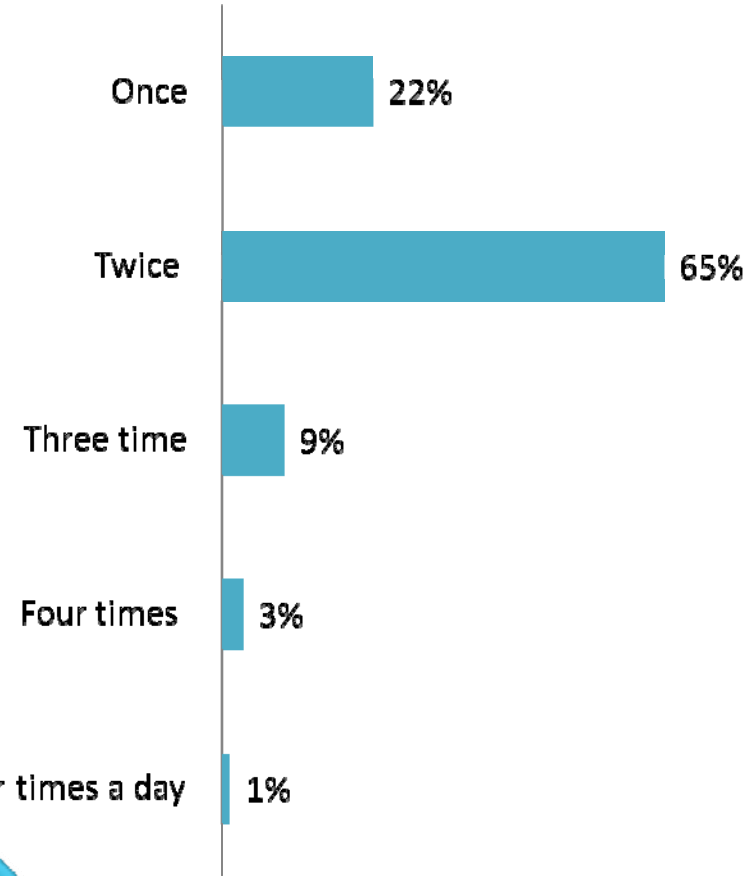
Base: All users: 3754, All who had 24 hour or 7 day access when joining: 1844

Two-thirds of members use the scheme more than once a week, and the same proportion hire a bicycle twice in one day

Q On average, how frequently do you use Barclays Cycle Hire for any trips?



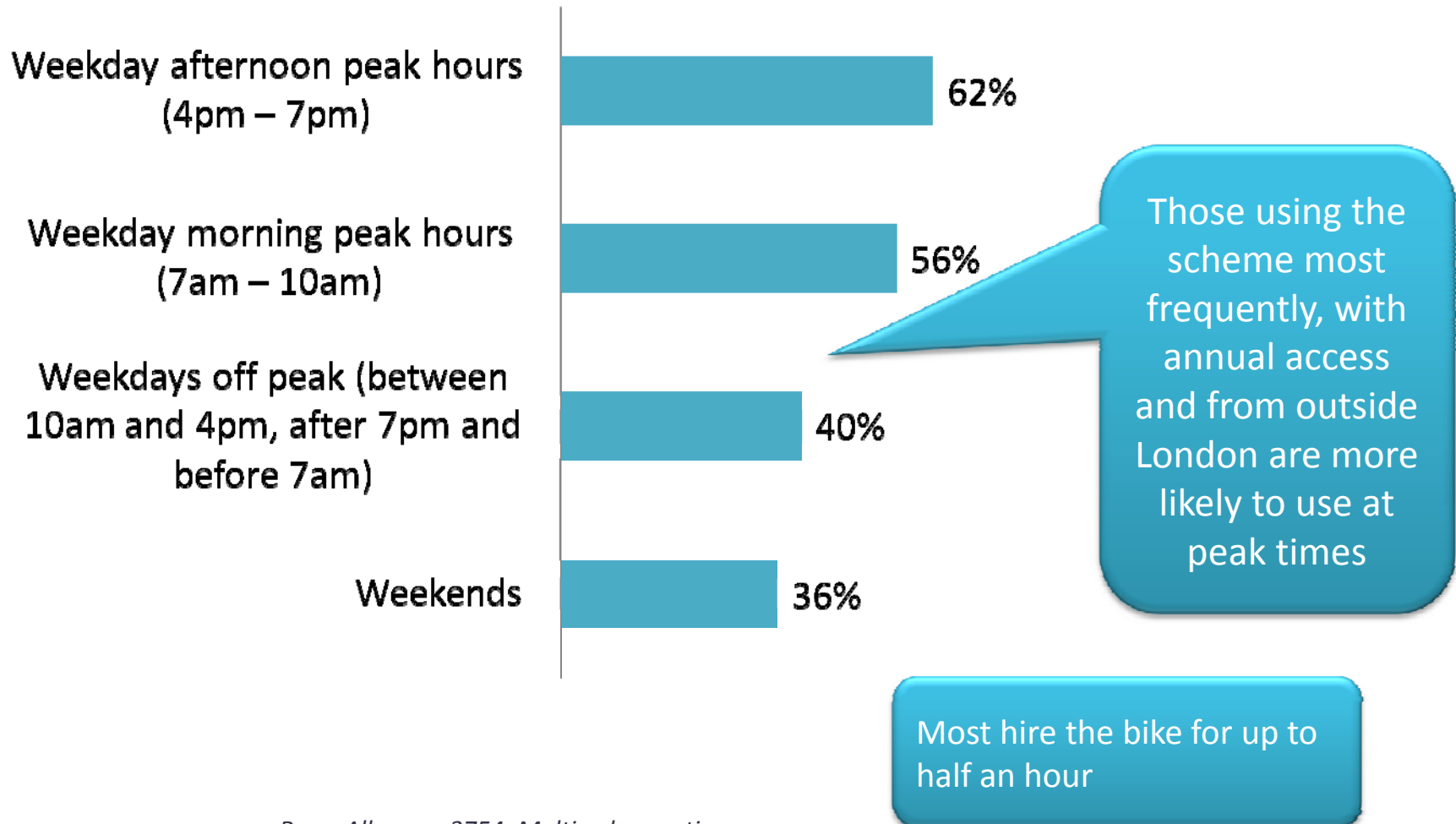
Q On days when you use Barclays Cycle Hire, how many times do you generally hire a bicycle



Those who have used the scheme more than once

Bicycles are used at all times of the day and week but the afternoon rush hour is the most popular

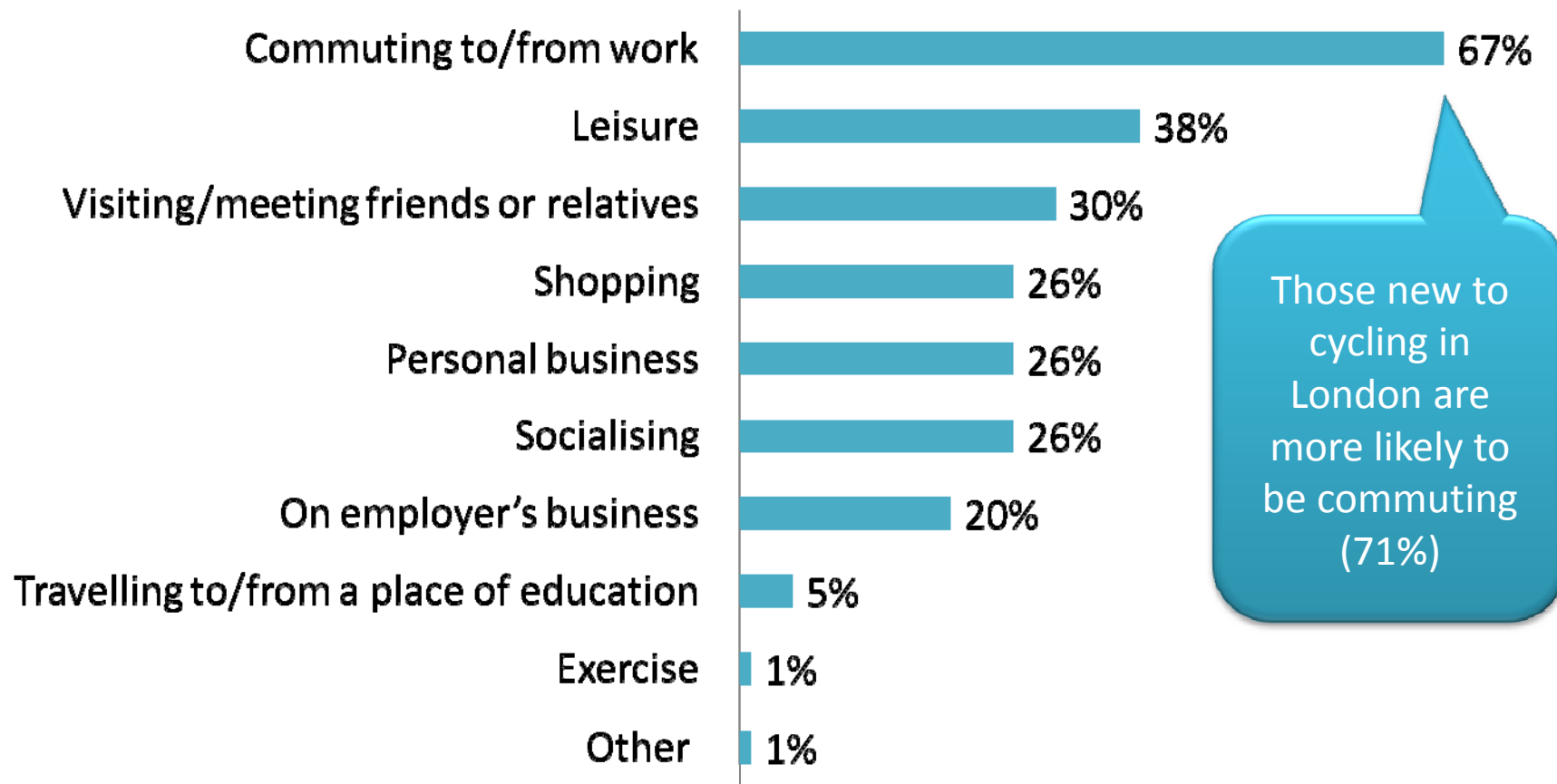
Q At what times do you typically use Barclays Cycle Hire?



Base: All users: 3754. Multicode question

Commuting is most likely journey purpose

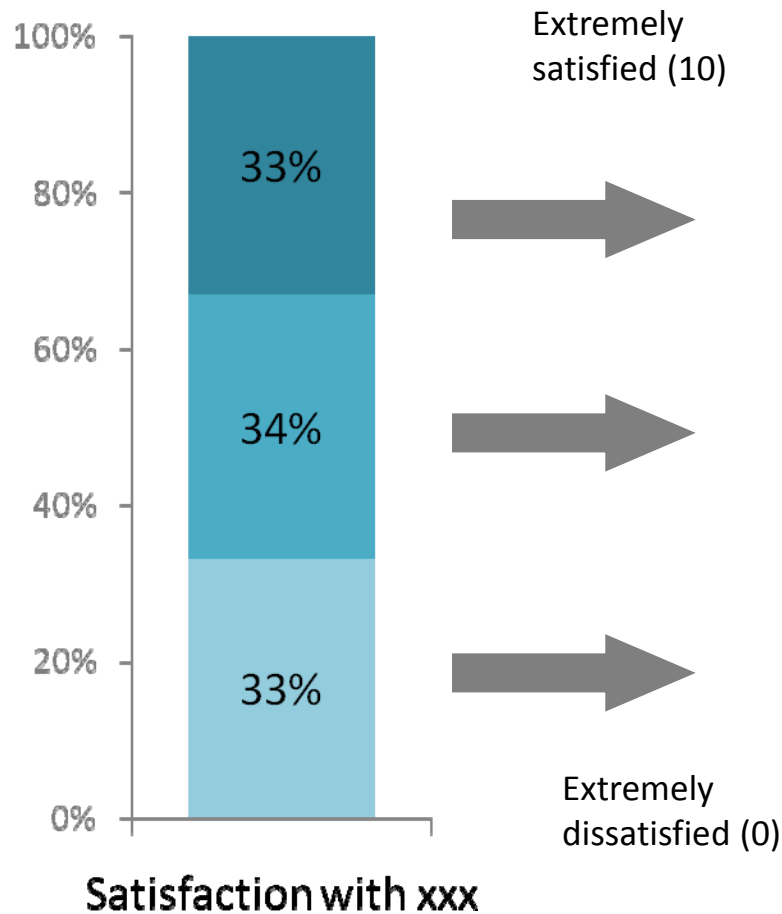
Q And what types of trips do you make using Barclays Cycle Hire?



4. Overall attitudes to Barclays Cycle Hire

Reporting 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

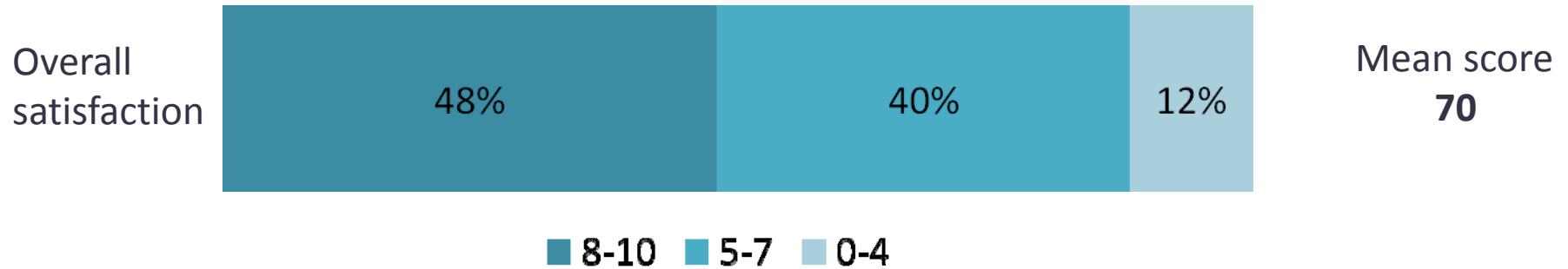
The 'top box' includes those who are very satisfied – i.e. those giving answers of 8 or 10.

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

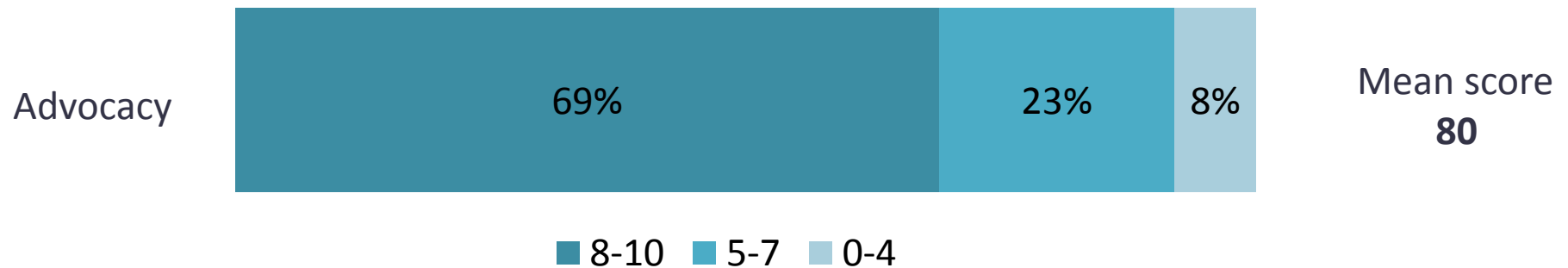
the 'bottom box' comprises those who are dissatisfied – i.e. those saying 0-4

Overall satisfaction with BCH is high and advocacy is even higher

Q . How satisfied are you with your overall experience of Barclays Cycle Hire (including paying the access fee and or usage charge if applicable)?



Q . How likely would you be to recommend Barclays Cycle Hire to friends and family?



Base: All users: 3754

Value for money scores are good – 70% are satisfied. For those who aren't, operational issues with the scheme are important

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

Satisfaction
with value
for money

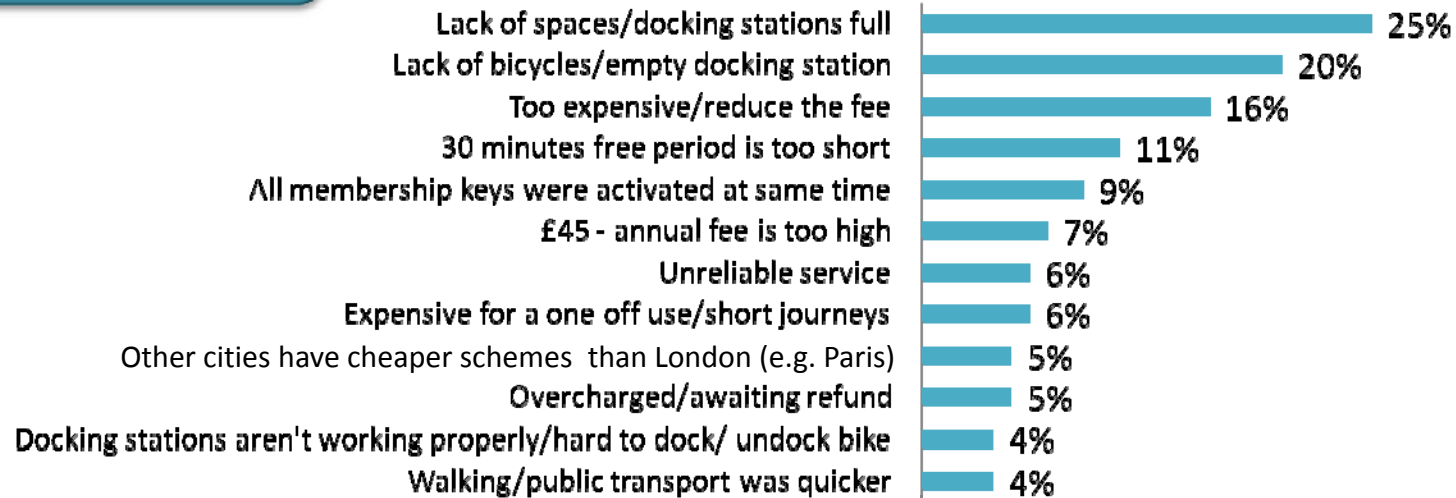


Mean score
81

■ 8-10 ■ 5-7 ■ 0-4

Reasons for
dissatisfaction

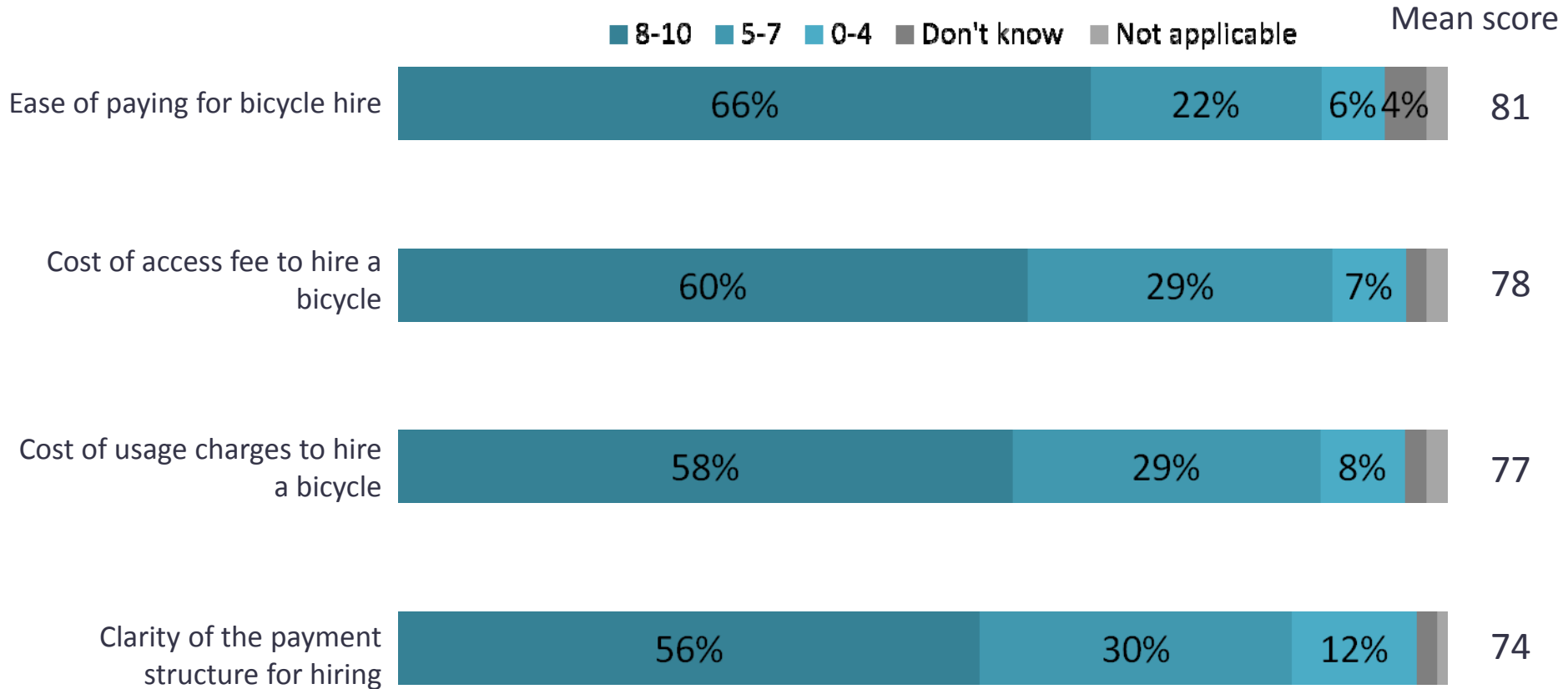
Q Why do you say you are dissatisfied with the value for money of Barclays Cycle Hire?



Base: All users: 3754, all who are dissatisfied with value for money and coded with a valid answer: 294. Why are you dissatisfied: Multicode question

Users are satisfied with how easy it is pay for BCH, but they are less happy with how the payment structure works

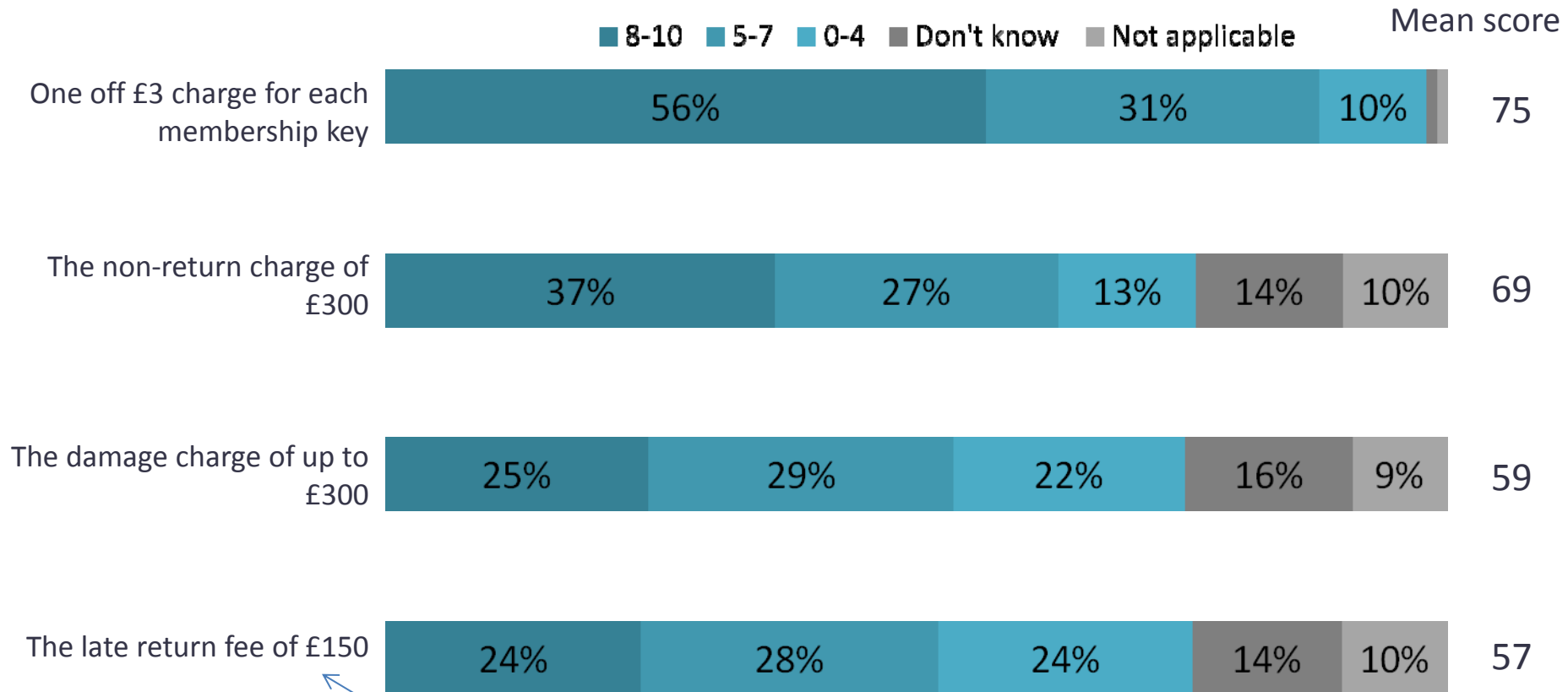
Q And how satisfied are you with the ...?



Base: All users: 3754

Turning to specific charges, users are least happy with the late return fee and damage charge

Q And how satisfied are you with the ...?

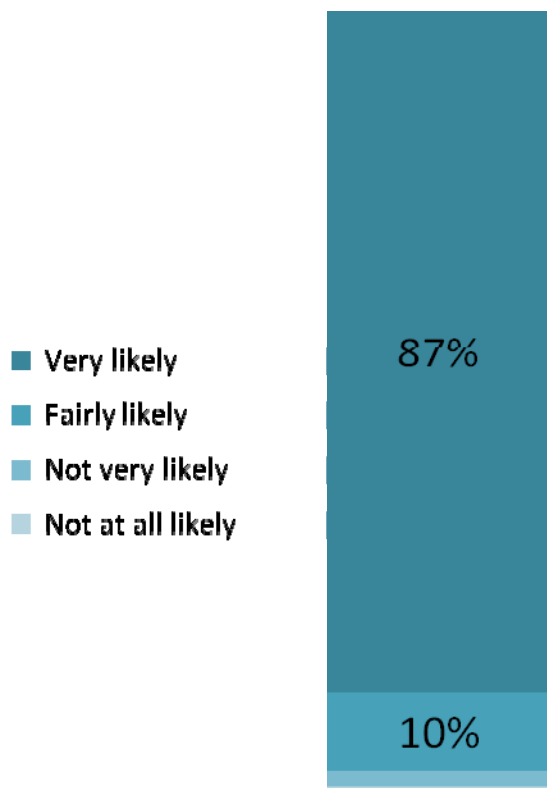


6% of users have been charged a late return fee

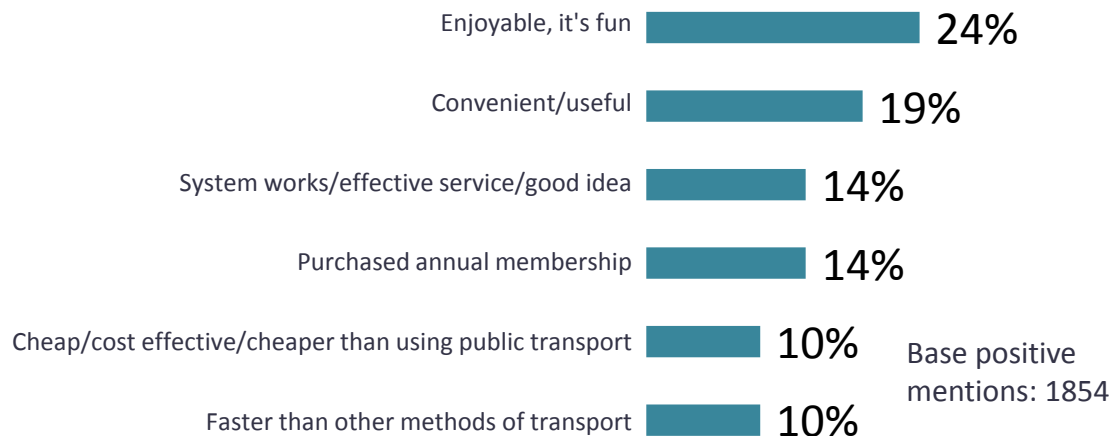
Base: All users: 3754

The majority are likely to use Barclays Cycle Hire again

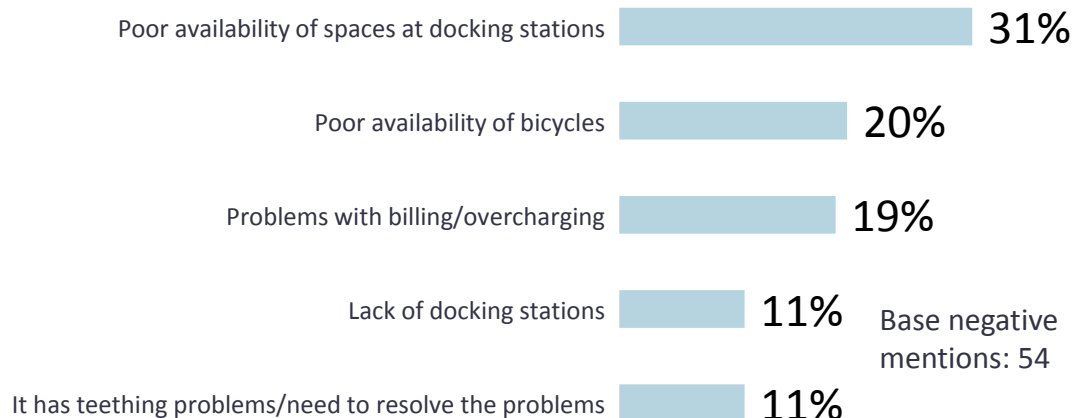
Q How likely, if at all, are you to use Barclays Cycle Hire again?



Q Why do you say that? - Top six positive mentions



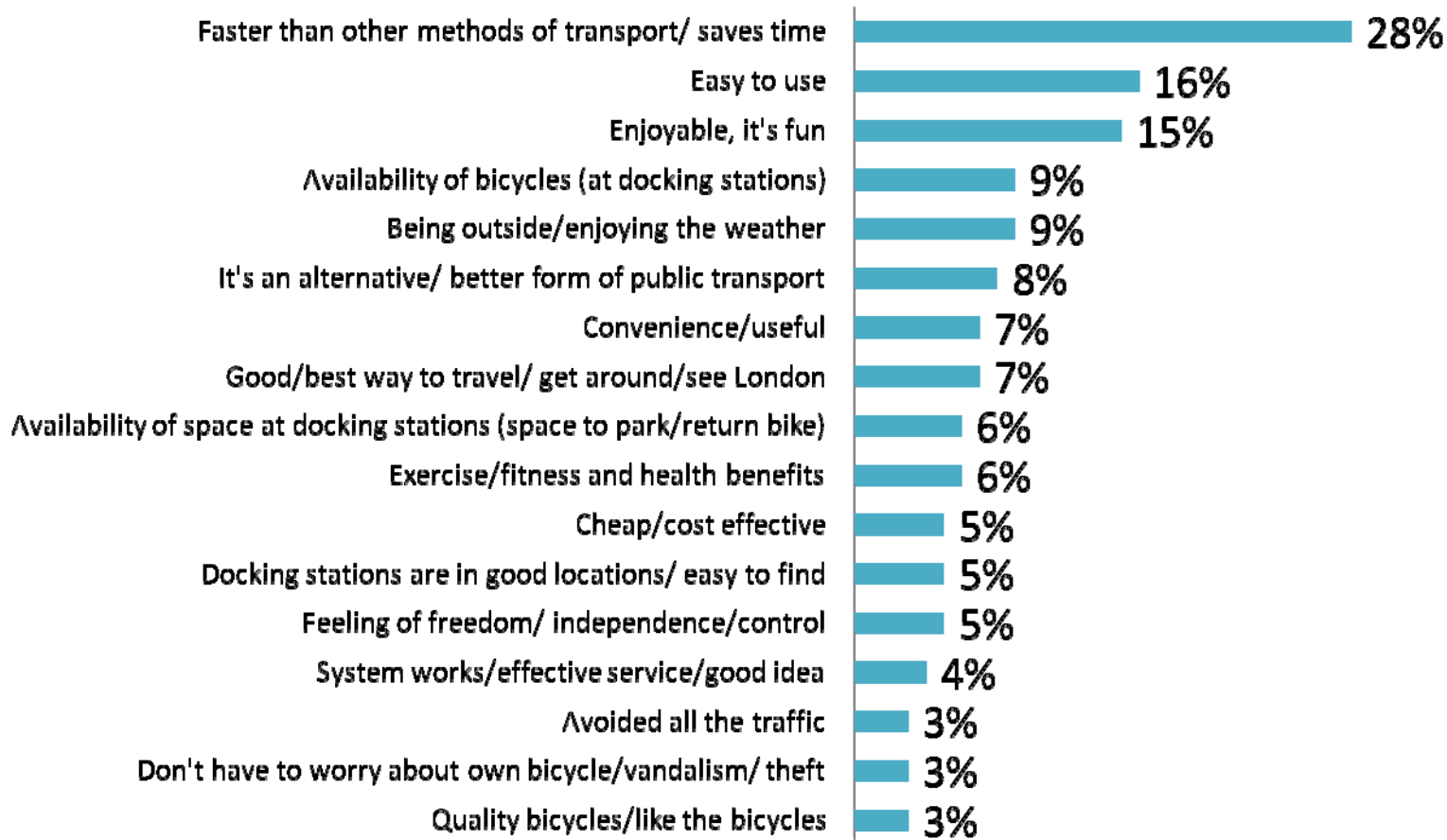
Q Why do you say that? - Top five negative mentions



Q How likely, if at all, are you to use Barclays Cycle Hire again? Base: All users: 3754. Q Why do you say that? Base all coded with a valid answer - positive mentions: 1854, negative mentions: 54 Multicode question

Time saved using BCH, the fun of using and its ease of use are particularly positive aspects

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



Base: All users coded and giving a valid answer: 1923 Multicode question

What users said..... Positive comments

"People asking me about it in the street, and being able to genuinely say that I love it."

Uses Barclays Cycle hire 5-6 days a week and has Annual access - started cycling in London within the last month

"The freedom of choosing the means of transport - cycle on the way in, bus on the way back, or walking + cycle."

Uses Barclays Cycle hire 3-4 days a week and has Annual access - started cycling in London within the last three months

"I like the efficiency and reliability of getting somewhere on time! Much more reliable than the tube, and less stuffy and cramped."

Uses Barclays Cycle hire 5-6 days a week and has 24 hour access - started cycling in London within the last month

"The system worked. Bike available, bike in working condition, docking station available at end of journey - money saved and a little bit fitter than yesterday."

Uses Barclays Cycle hire 5-6 days a week and has Annual access - started cycling in London within the last three months

"Cycling round London is extremely enjoyable way of seeing the city and much preferably to the Waterloo and City line."

Uses Barclays Cycle hire 5-6 days a week and has Annual access - started cycling in London within the last three months

"It was nice to be on the open road and I felt better for it, both environmentally and my well being."

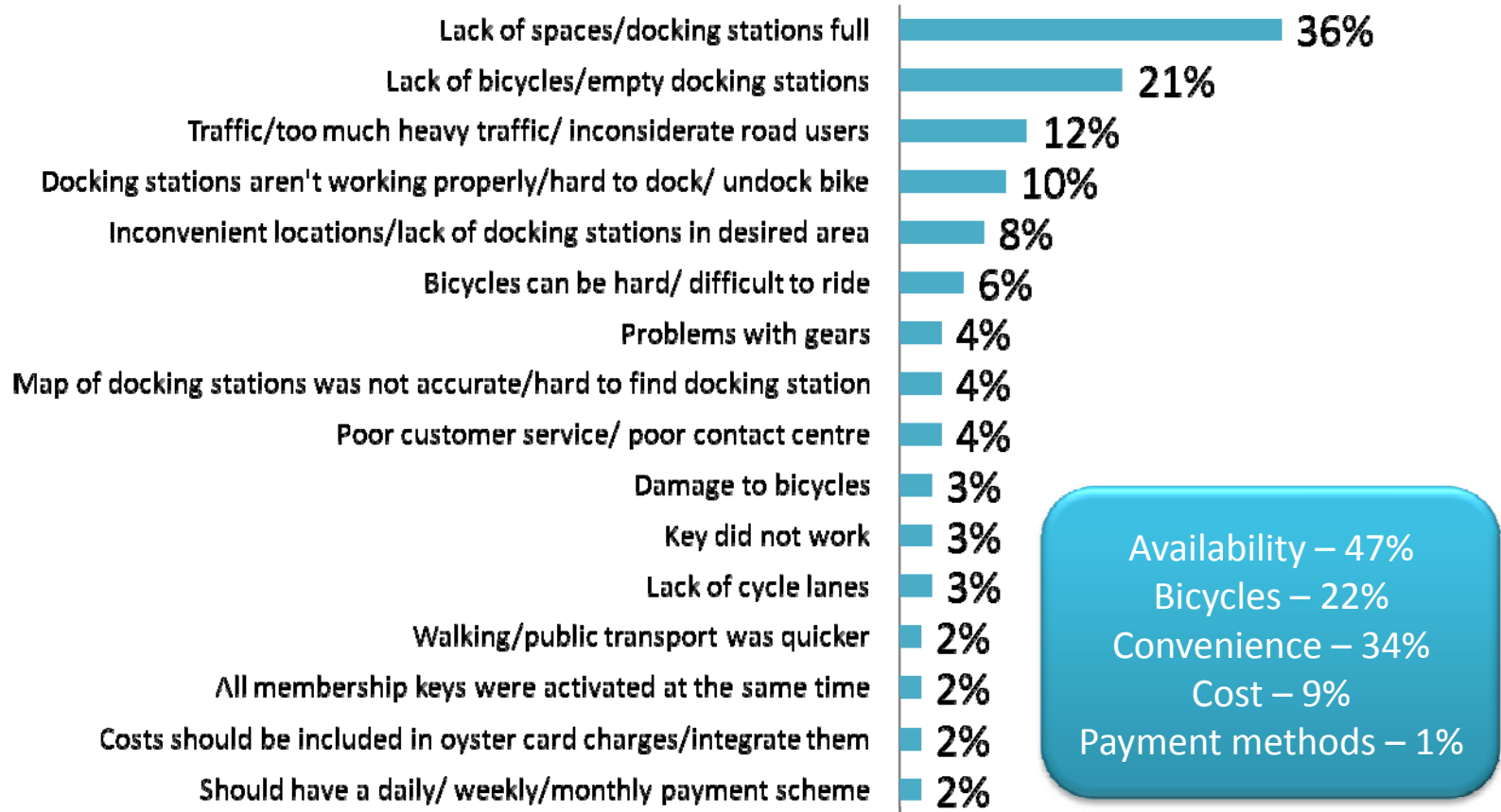
Uses Barclays Cycle hire 3-4 days a week and has 24 hour access - started cycling in London within the last month

"I love being able to leave the bike and simply walk away without a second thought."

Uses Barclays Cycle hire 5-6 days a week and has Annual access - started cycling in London more than a year ago

Problems with docking bicycles and lack of available bicycles are key to a negative experience of BCH

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



Base: All users coded and giving a valid answer: 1937. Multicode question

What users said.....Negative comments

"If you travel from a station to a main business area (eg Mayfair) at rush hour there is nowhere to dock a bike. I had to go to 7 docking stations and now feel like I can't use the scheme because there is no certainty of being able to dock a bike."

Uses Barclays Cycle hire 5-6 days a week and has Annual access - started cycling in London within the last year

"Not enough cycle lanes. Buses are a big problem for cycling - bus drivers and car drivers should be educated in the way that cyclists have to navigate around the roads. Cycling has to be made safer."

Uses Barclays Cycle hire 5-6 days a week and has Annual access - started cycling in London within the last month

"The only thing I think is really misconceived is that multiple keys get activated at the same time. That (for me) completely removes the benefit of having multiple keys at all, and I don't understand under what circumstances it could ever be an advantage."

Uses Barclays Cycle hire 5-6 days a week and has Annual access - started cycling in London more than a year ago

"Takes longer than getting the tube. Getting there is faster, but the docking points are always full so finding another empty one takes as long as the journey itself."

Uses Barclays Cycle hire 5-6 days a week and has Annual access - started cycling in London more than a year ago

"Bikes are heavy if you need to lift them over steps, not enough gears, the difference between 2 and 3 is too much."

Uses Barclays Cycle hire 5-6 days a week and has Annual access - started cycling in London within the last month

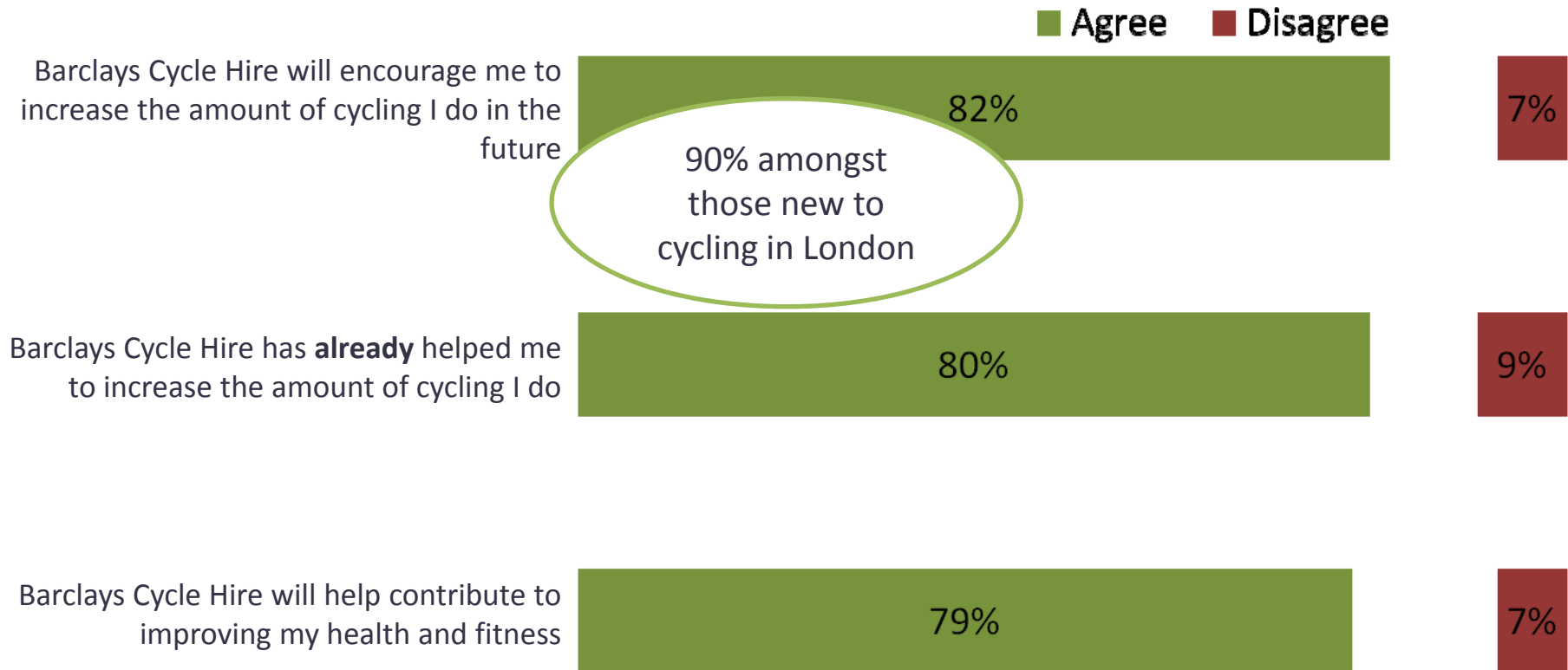
The majority agree that BCH has a positive impact on London and consider it as an alternative form of public transport

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?



There are high levels of agreement that BCH will help increase the amount of cycling people do both now and in the future

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?



5. Satisfaction with key touch points



5.1. Is there enough information about the scheme and where is it coming from?

Over half are satisfied with information provided, but confusion over costs and activating membership keys increase dissatisfaction

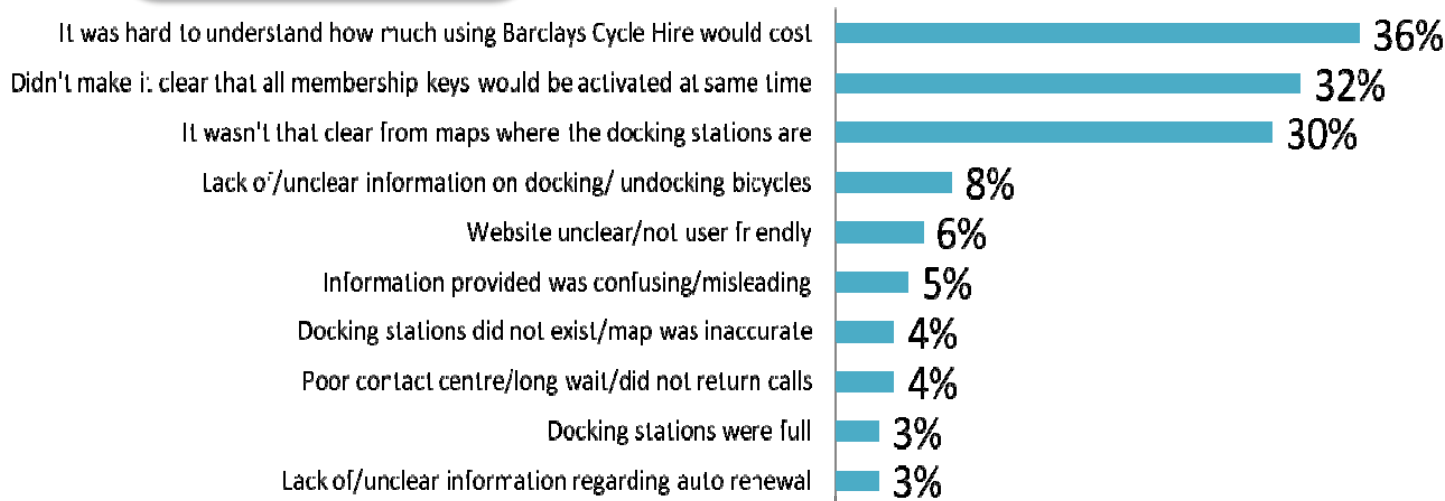
Q How satisfied are you with the information on how Barclays Cycle Hire works?



■ 8-10 ■ 5-7 ■ 0-4

Reasons for dissatisfaction

Q And, why do you say you are dissatisfied with the information you have obtained or received on Barclays Cycle Hire?

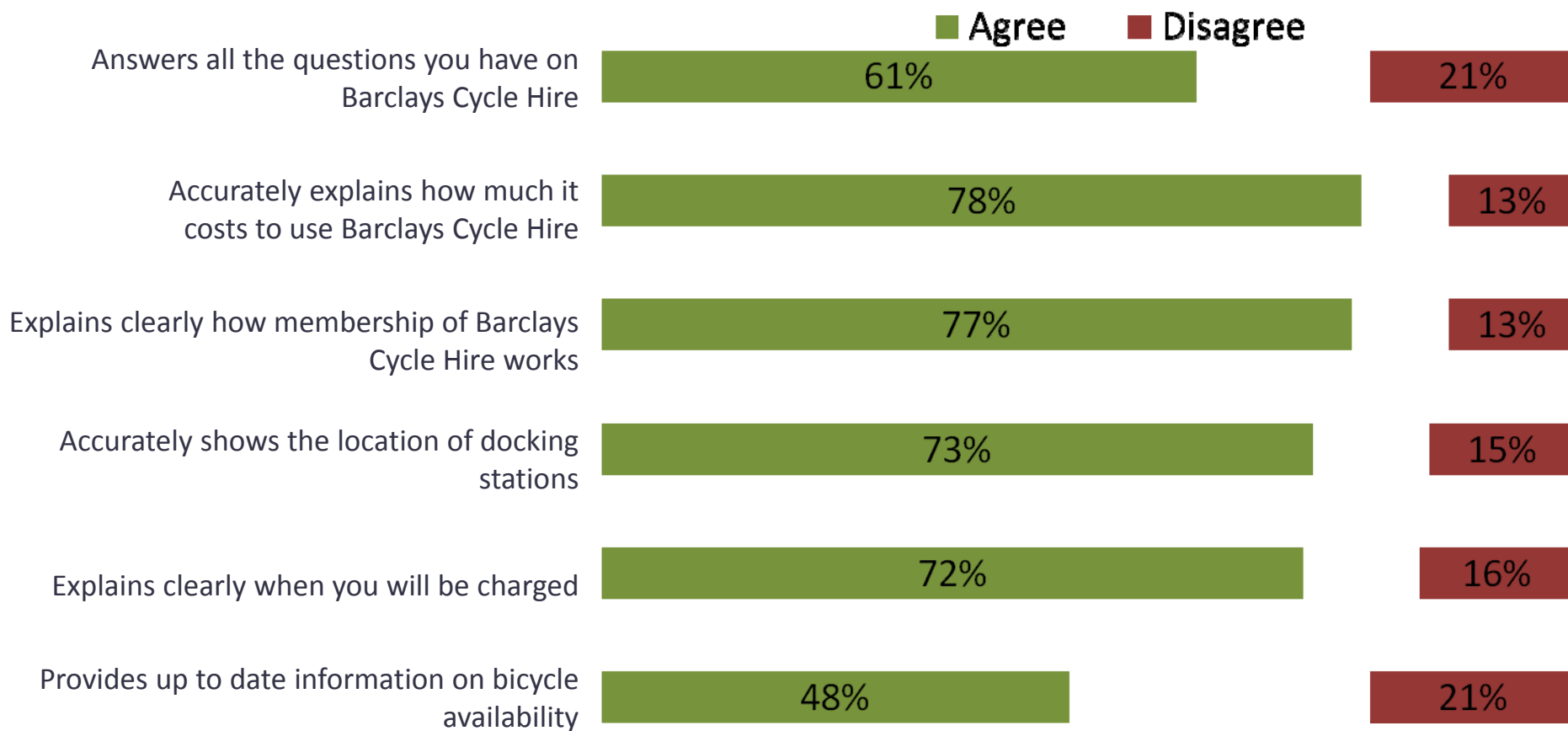


Base: All users: 3754, all who are dissatisfied with information on BCH:

913. Q Why are you dissatisfied: Multicode question

Accurate information on bicycle availability is lacking

Q And, to what extent do you agree or disagree that information on Barclays Cycle Hire, including the information on the website....?



Base: All users: 3754



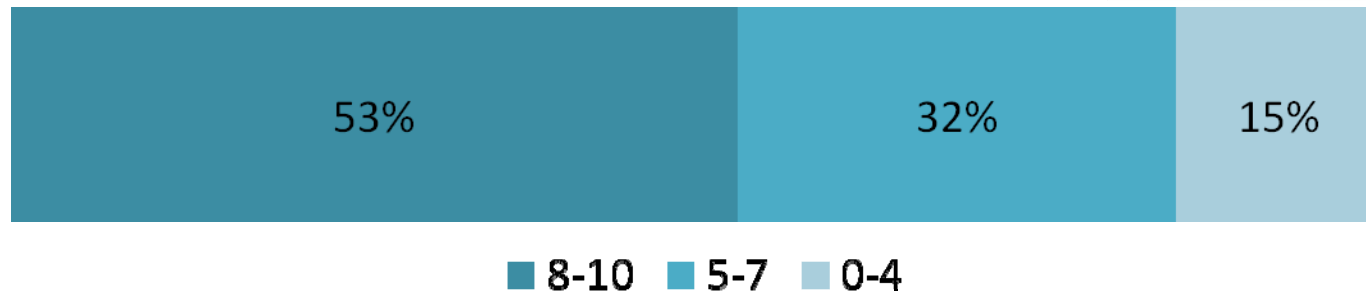
5.2. How did users find the registration process?

Over half are satisfied with the process of registering, technical problems with the website are a key source of dissatisfaction

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

90% registered online

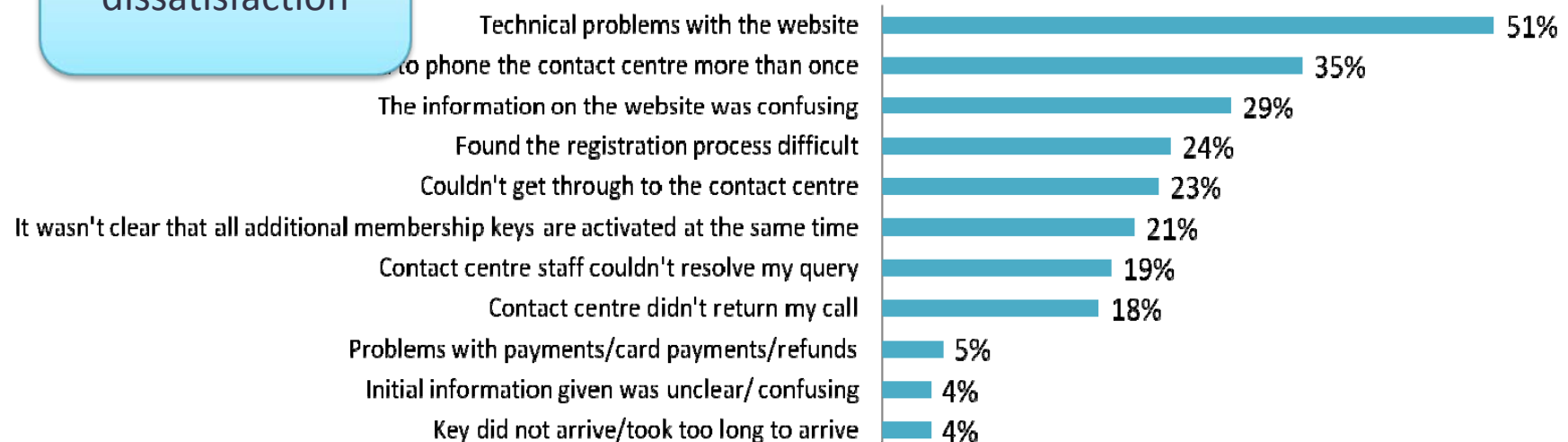
Satisfaction with registering as a member



Mean score
71

Reasons for dissatisfaction

Q why do you say you are dissatisfied with the registration process?



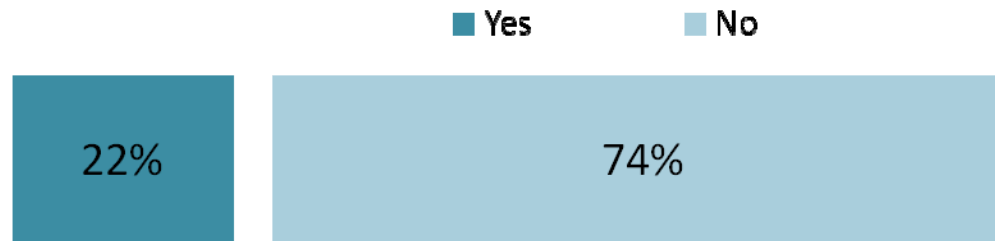
Base: All users: 3754, all who are dissatisfied with the process of registering as a member: 1109. Q Why are you dissatisfied: Multicode question



5.3. Additional membership keys

There are low levels of awareness about simultaneous access periods, and satisfaction with information about additional keys is luke warm

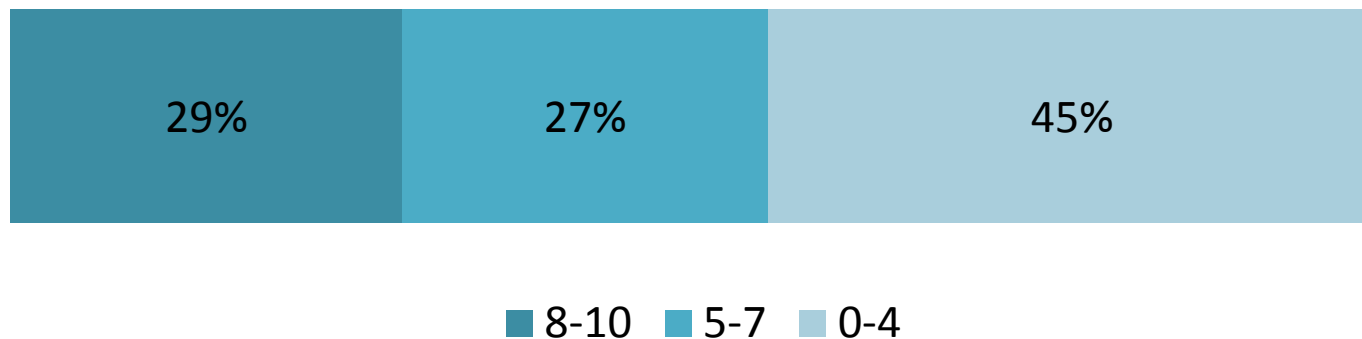
Q Were you aware that starting an access period for one membership key starts the access period for all your additional keys?



18% have an additional key – in most cases this was for other family members to use (82%)

Q When you joined Barclays Cycle Hire how satisfied were you with the information provided about having an additional membership key?

Satisfaction
with info
about
additional
membership
keys



Mean score
48

Base: All users who have more than once membership key: 692

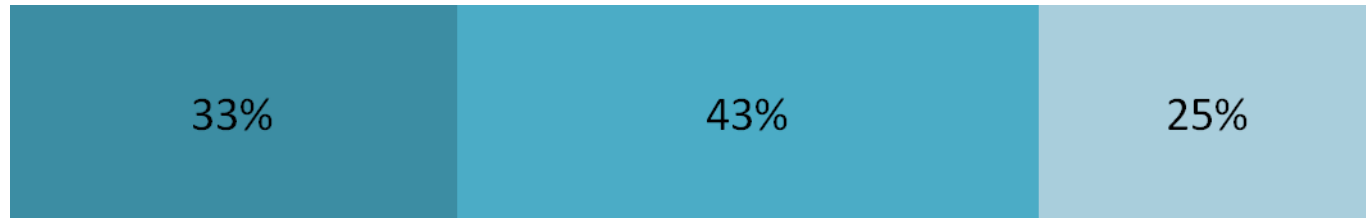


5.4. Experience of using docking stations

A quarter are not happy with docking stations and lack of spaces and bicycles are top reasons for this

Q How satisfied are you with the docking stations overall

Satisfaction
with
docking
stations

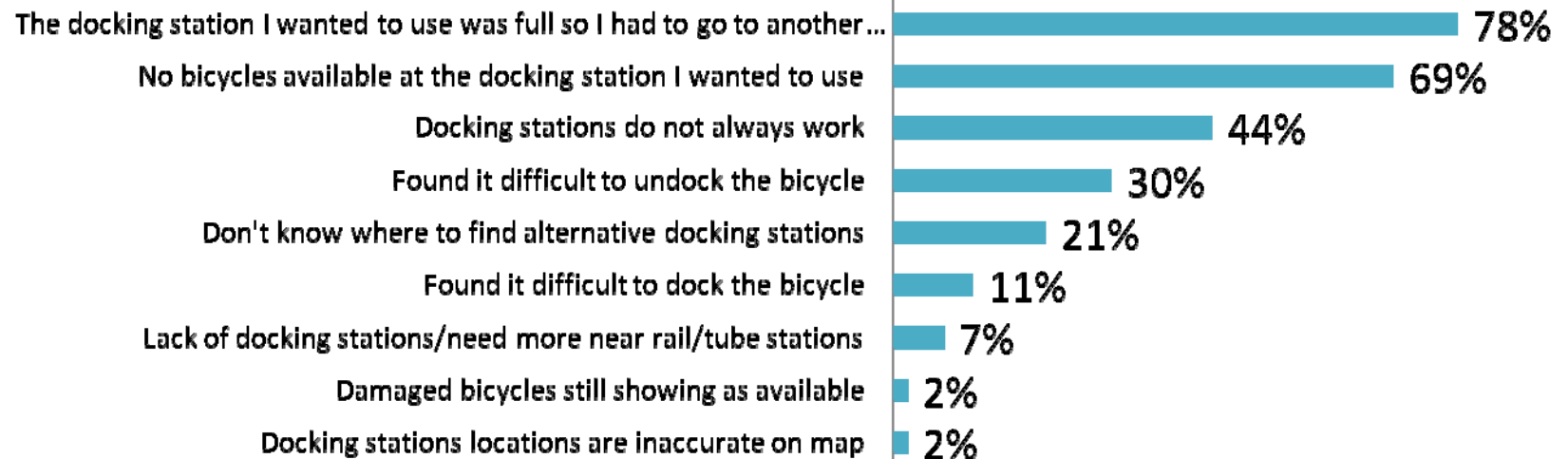


Mean score
61

■ 8-10 ■ 5-7 ■ 0-4

Reasons for
dissatisfaction

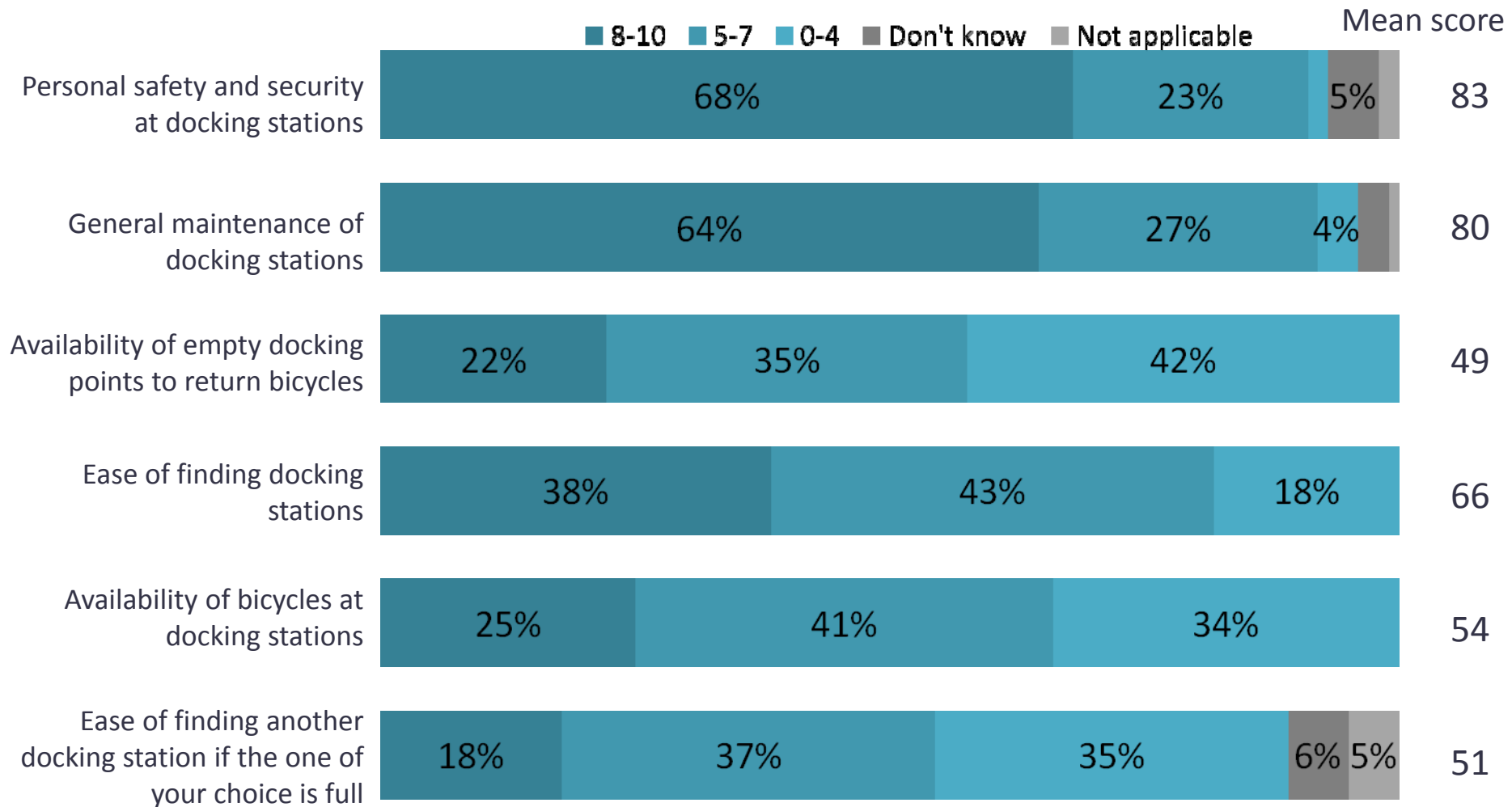
Q And, why do you say you are dissatisfied with the docking stations?



Base: All users: 3754, all who are dissatisfied with docking stations: 1816. Q Why are you dissatisfied: Multicode question

Users are satisfied with their security when using docking stations, but finding another docking station causes dissatisfaction

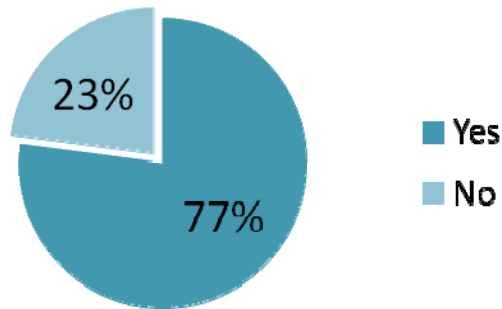
Q And how satisfied are you with ...?



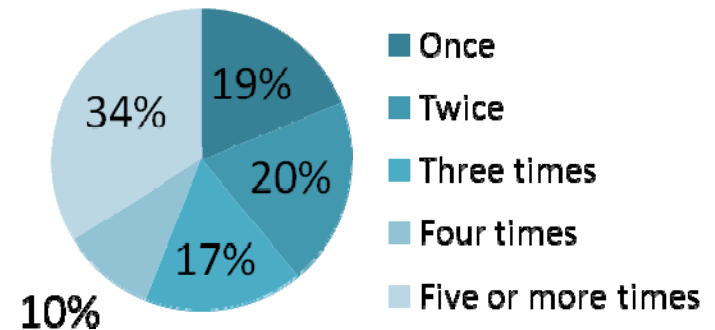
Base: All users: 3754

Majority of users have had to go to another docking station and are dissatisfied with the experience

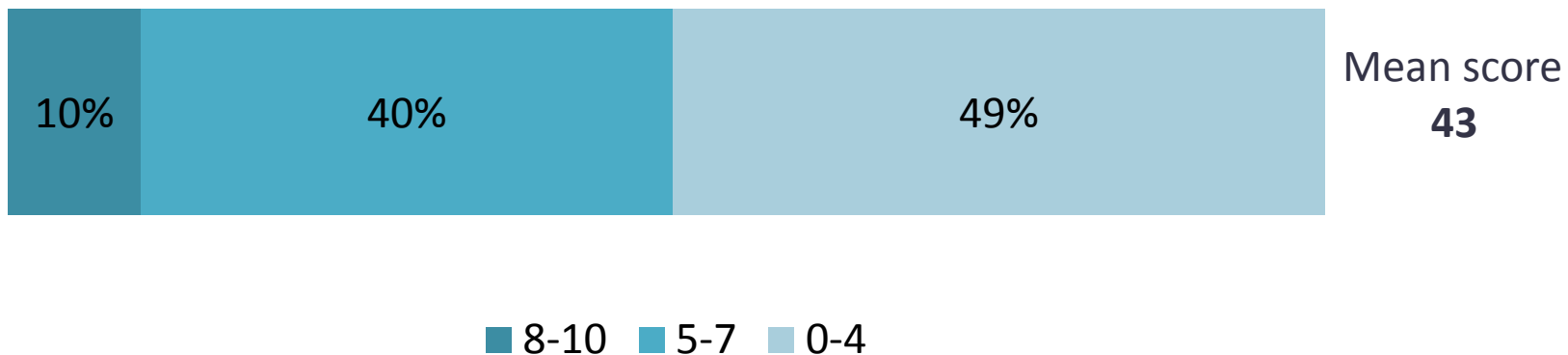
Q Have you at anytime had to go to another docking station as there were no spaces available at your docking station of choice?



Q How many times have you had to do this in the last month?



Q How satisfied are you with the ease of doing this?



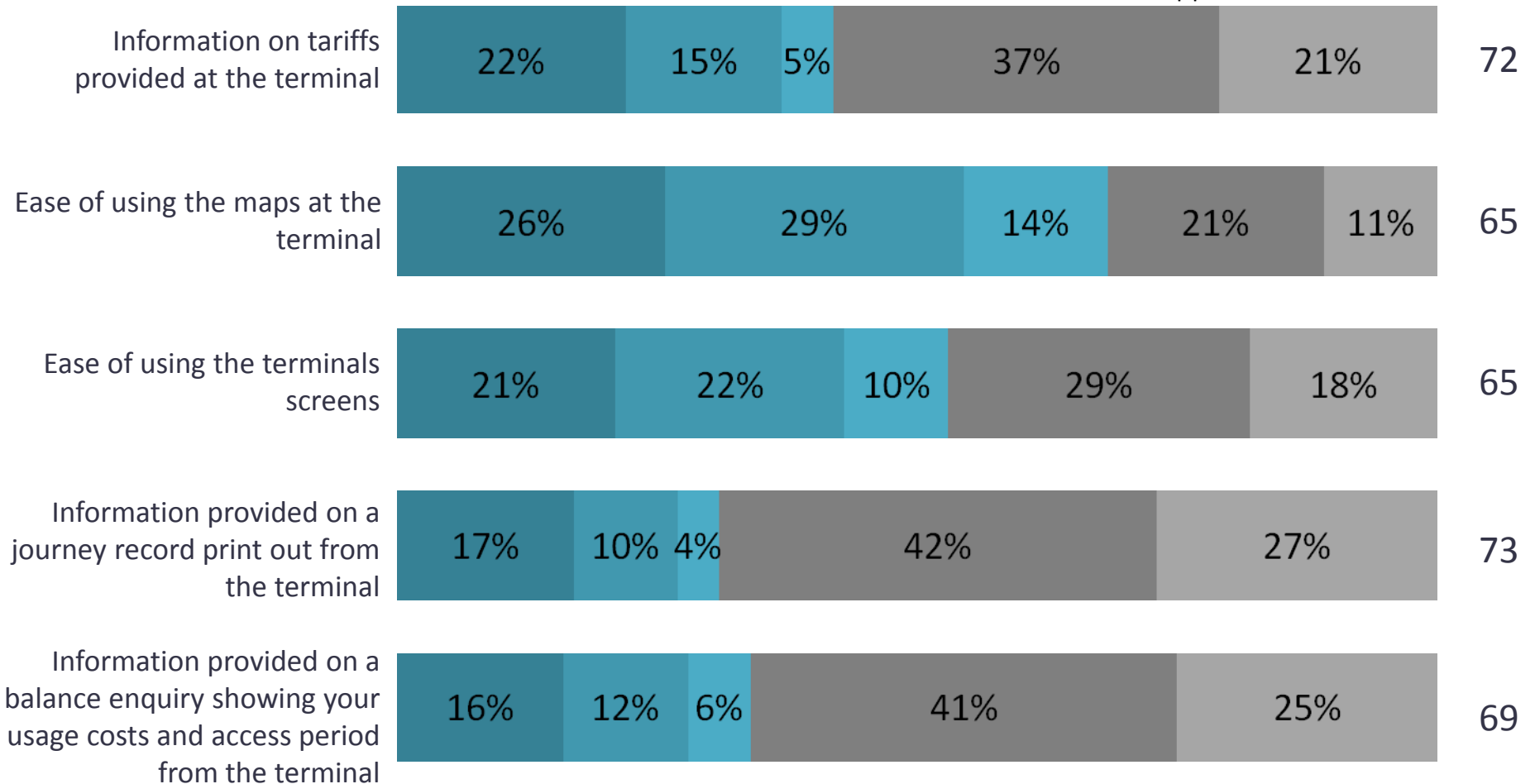
Base: All users: 3754, all who have to go to another docking station: 2878

The majority of users haven't used the terminals or don't know about what services they offer

Q And how satisfied are you with ...?

Mean score

8-10 5-7 0-4 Don't know Not applicable



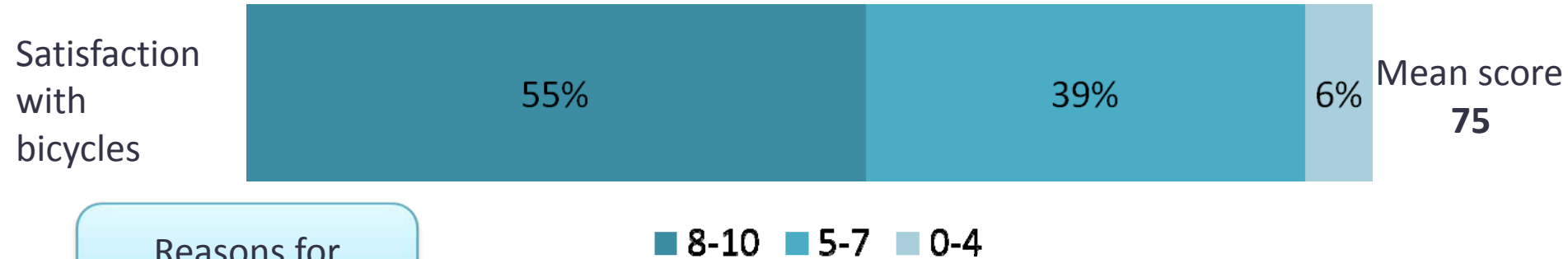
Base: All users: 3754



5.5. Using the bicycles

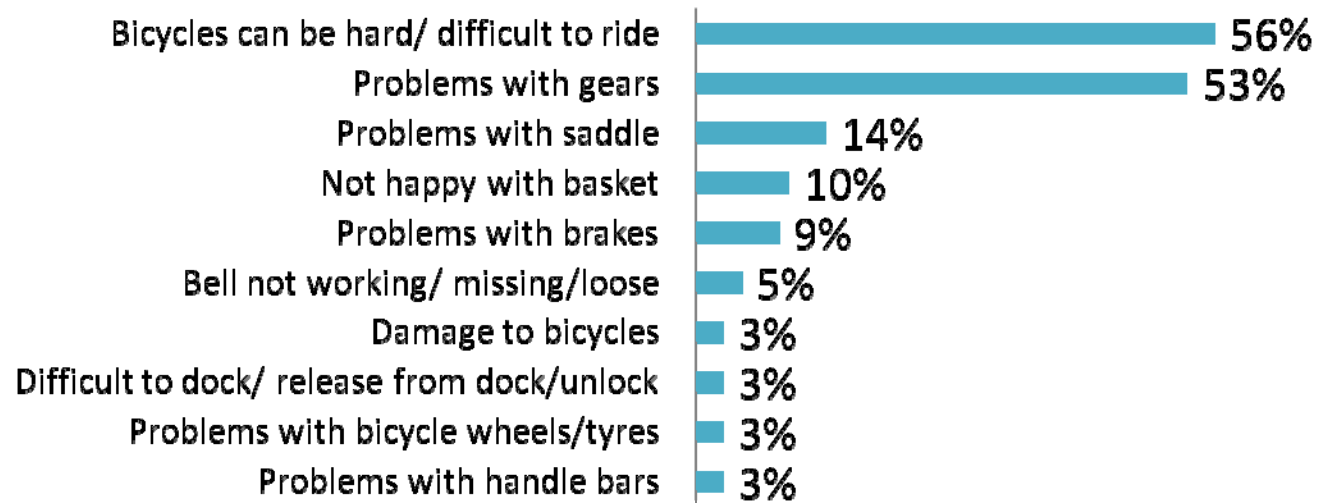
Satisfaction with bicycles is high, but difficulties riding bicycles and the gears cause issues

Q Firstly, in general how satisfied are you with the bicycles you have hired through Barclays Cycle Hire



Reasons for dissatisfaction

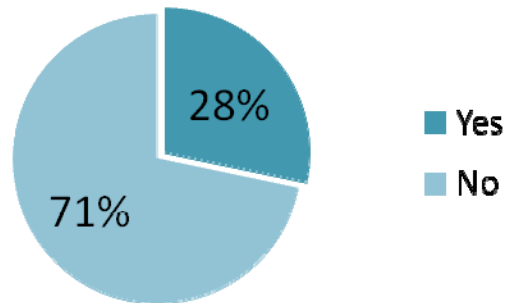
Q And, why do you say you are dissatisfied with the bicycles?



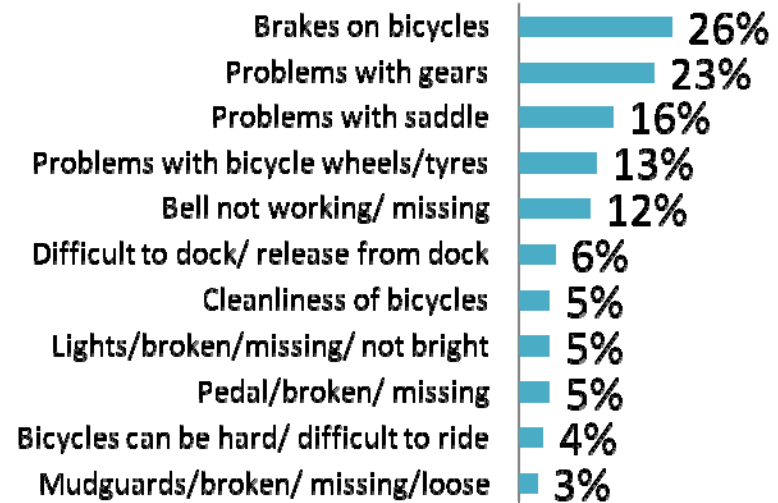
Base: All users: 3754, all who are dissatisfied and coded with a valid answer. 427 Q Why are you dissatisfied: Multicode question

Just over a quarter of users have experienced a problem with bicycles

Q Have you experienced any problems with the bicycles you have hired through Barclays Cycle Hire?



Q . What types of problems have you experienced with the bicycles?



Those who have had a problem

52% reported the problem with the bicycle:
47% by pushing the fault button
5% by calling the contact centre

Base: All users: 3754, all who had problems with bicycles: 1059 Q What types of problems have you experienced with the bicycles : Multicode question



5.6. Experience of speaking to the contact centre

Three in five have rung the contact centre – problems with docking stations and membership keys are main reasons

63% of users have rung the contact centre

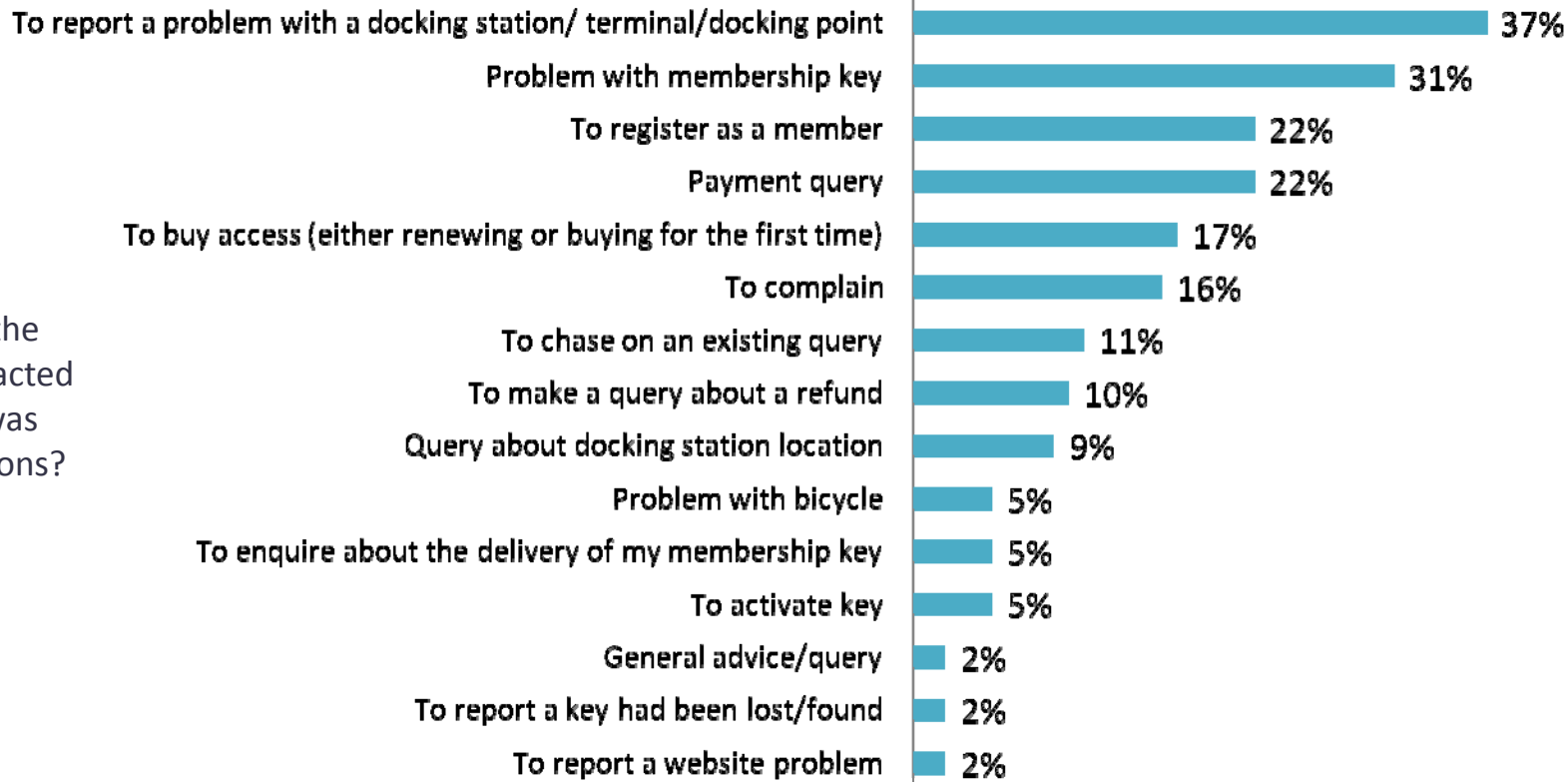


An average of 2.6 times



56% of queries were resolved during first phone call

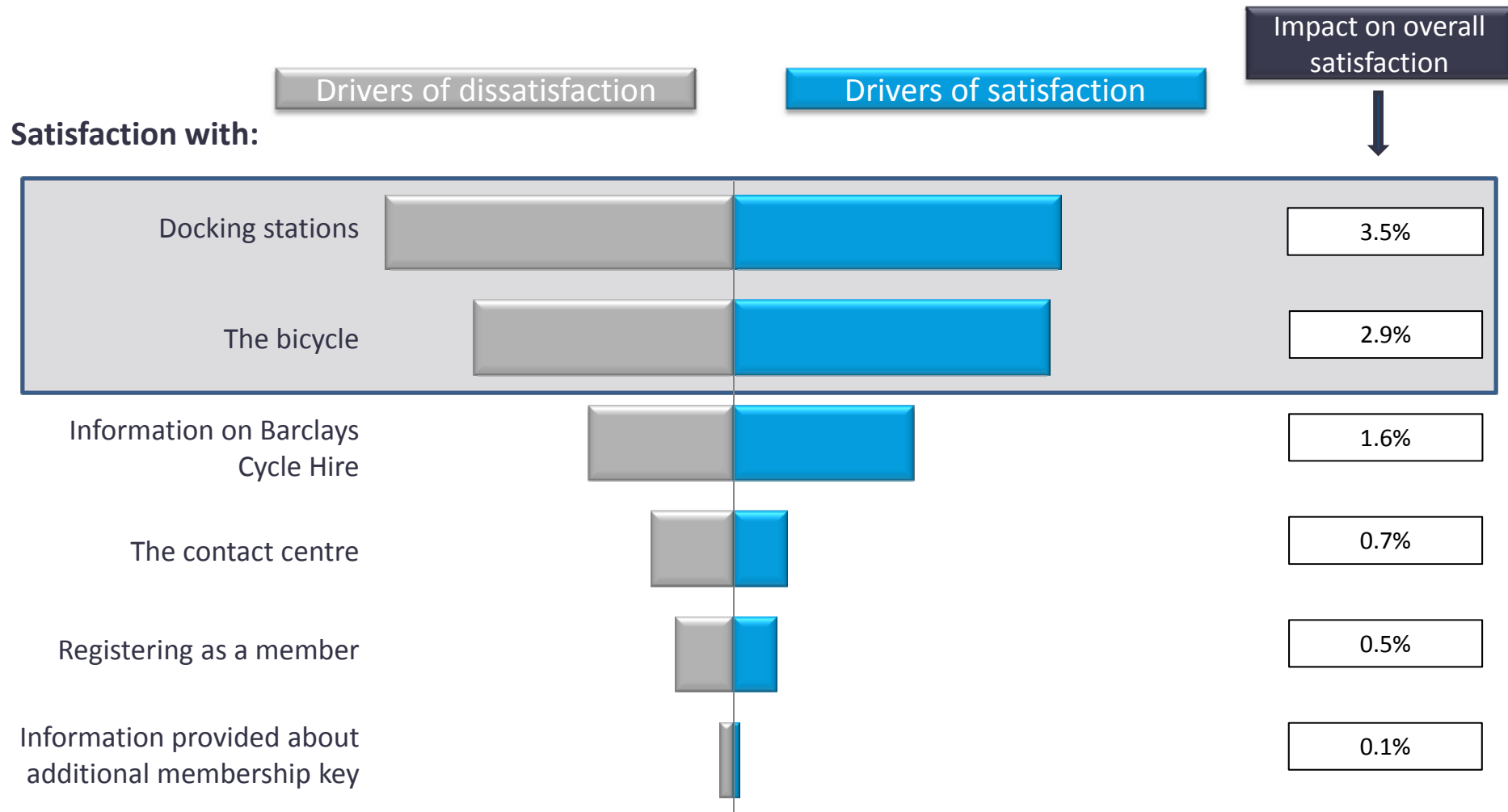
Q Thinking about the last time you contacted the centre, what was the reason or reasons?



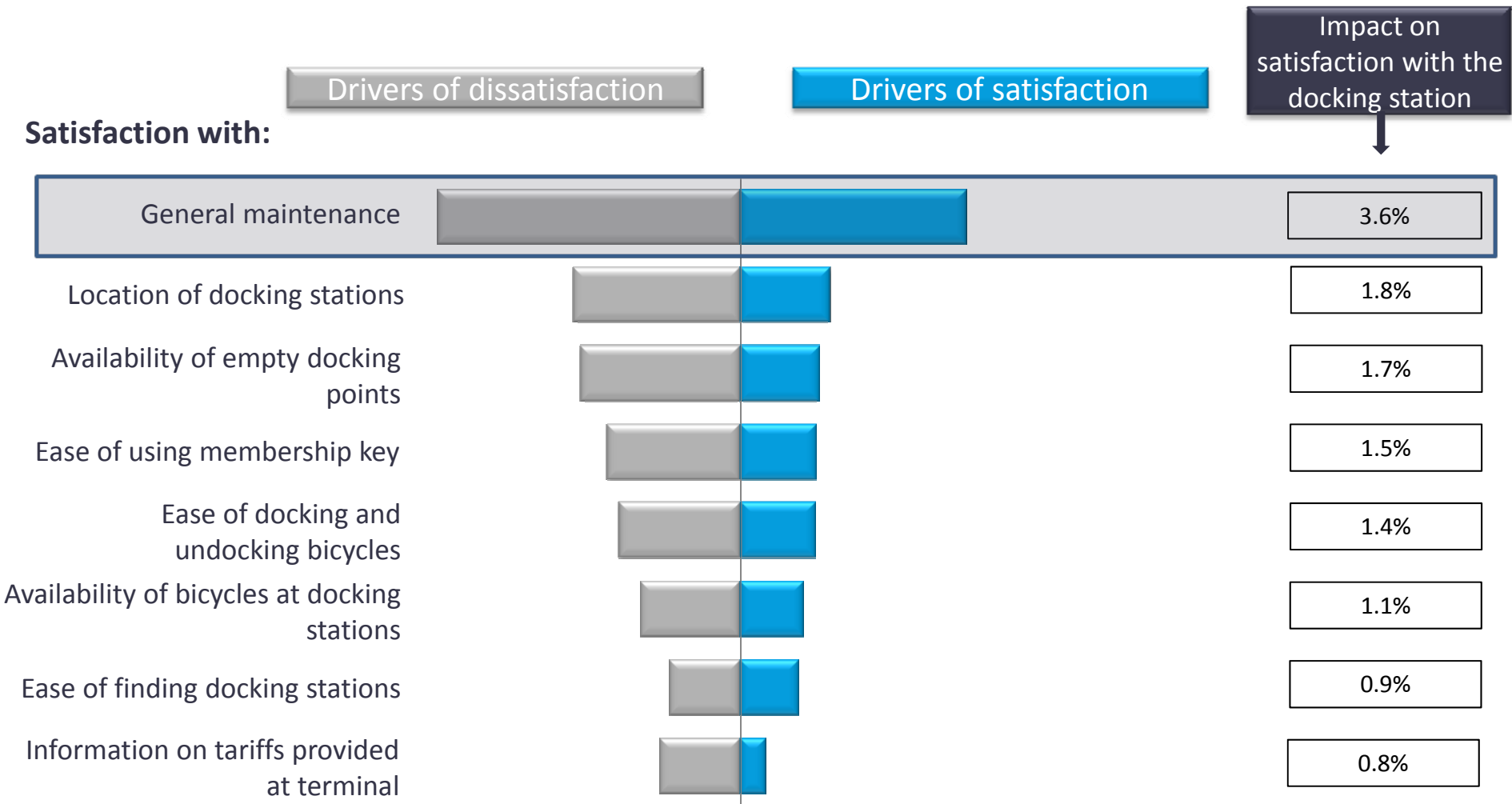
Base: All users: 3754, All who have rung the contact centre: 2350. Q Thinking about the last time you contacted the centre, what was the reason or reasons: Multicode question

6. Impact of the key measures on overall satisfaction and areas to focus on

Focus on docking stations and the bicycles to drive overall satisfaction up

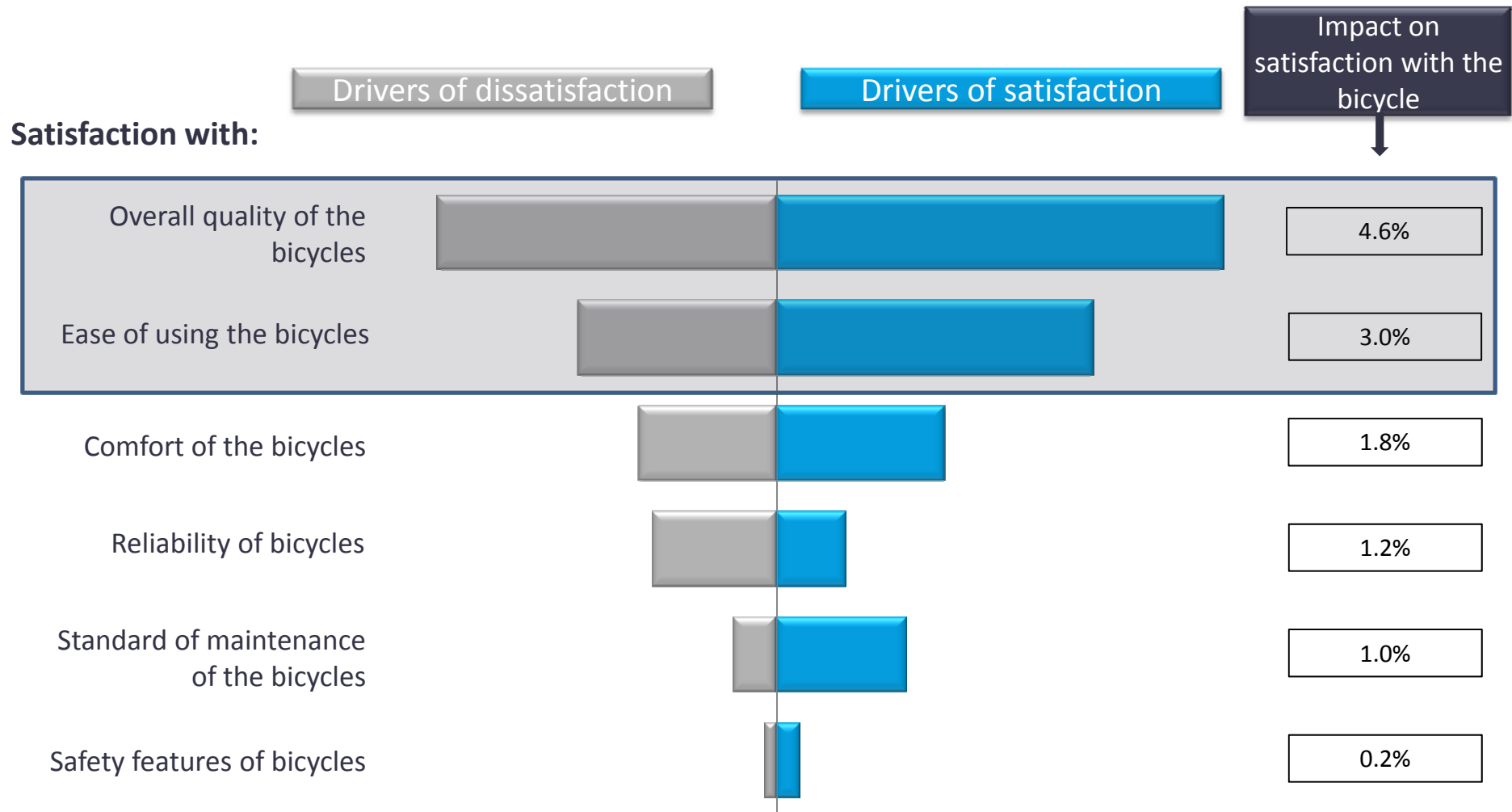


General maintenance is the key element to get right in order to drive satisfaction with this touchpoint

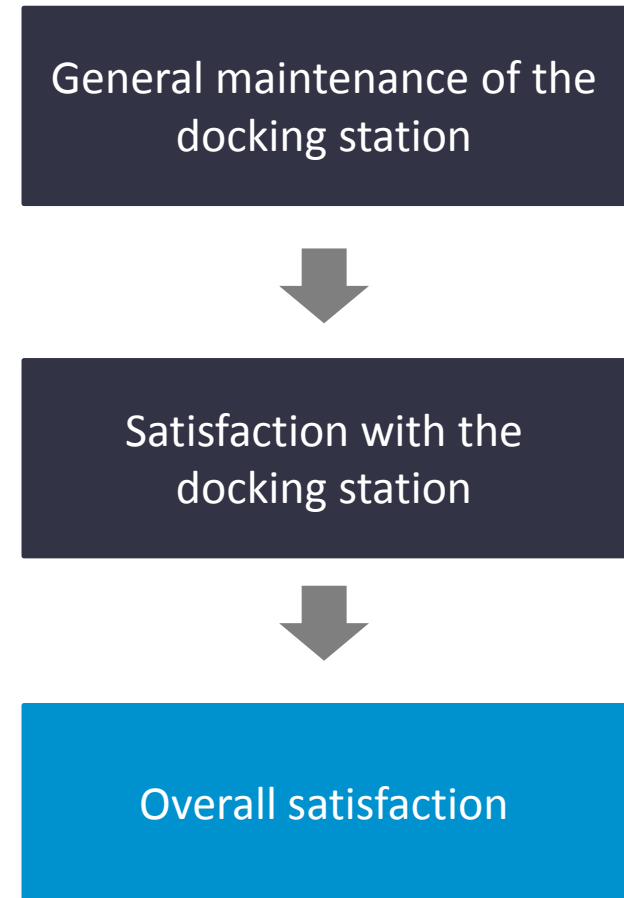
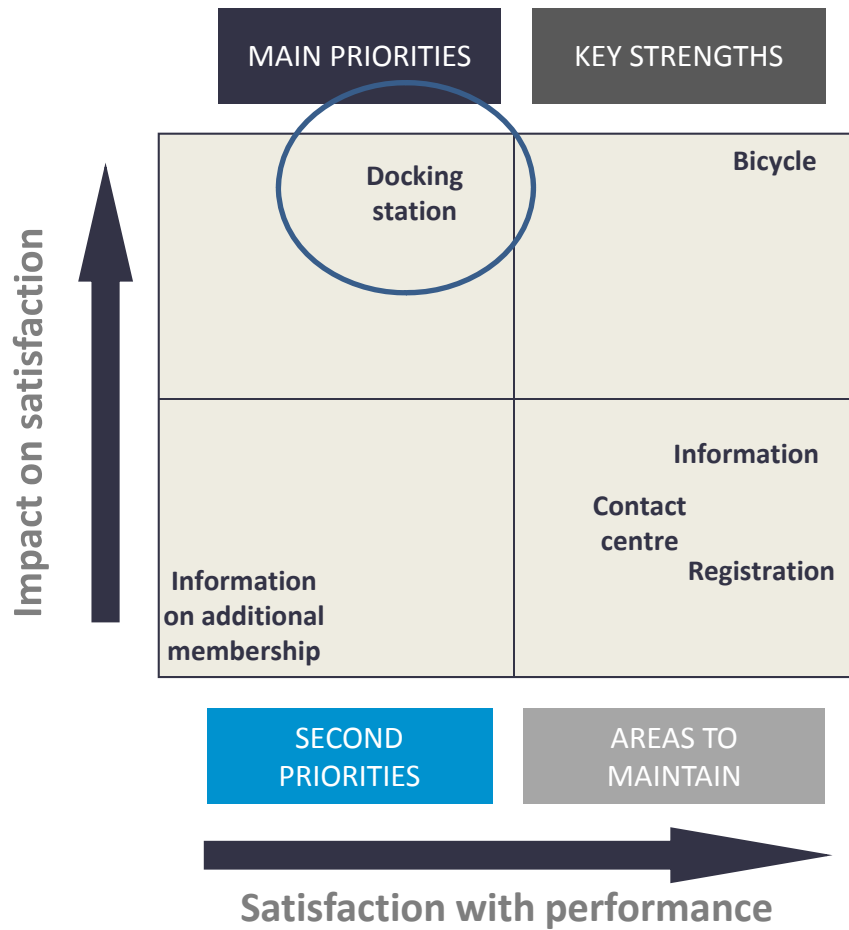


Quality of the bicycles and ease of use are key elements to get right in order to drive satisfaction with this touchpoint

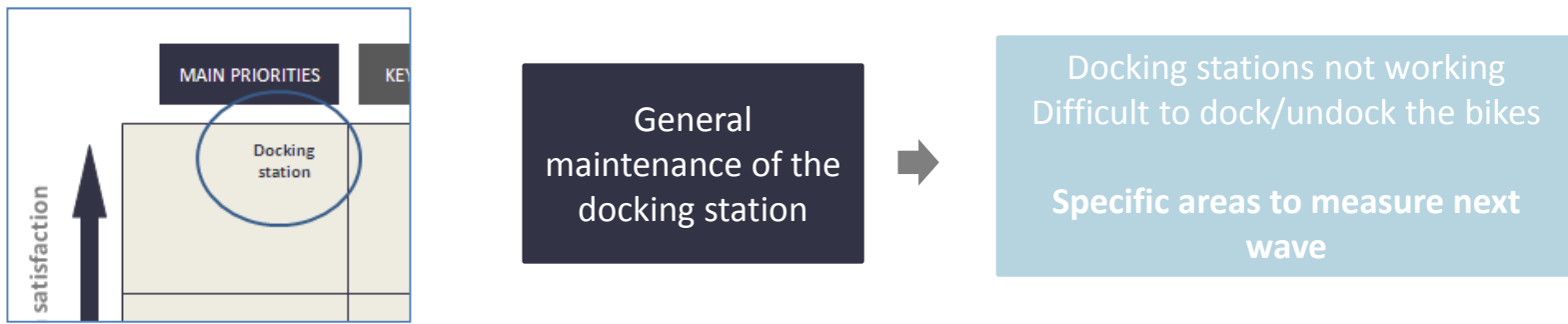
50



Where to focus



Why is general maintenance of docking stations an area to focus on?



General maintenance has relatively high levels of satisfaction (64%) vs availability of empty docking points (22%) – so why has this come out as a driver?

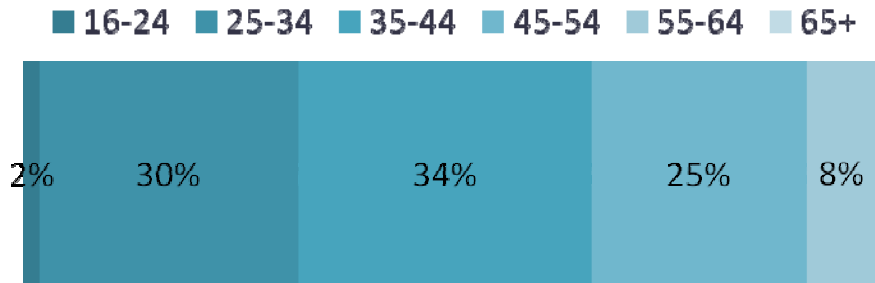
- Those with **different** levels of satisfaction with availability of empty docking points may still have similar levels of overall satisfaction HOWEVER –
 - Satisfaction with general maintenance is more closely correlated to overall satisfaction i.e. high satisfaction with general maintenance = high overall satisfaction and vice versa
- Early days in the scheme so users may be willing to overlook teething problems such as distribution of bicycles but NOT what they perceive as preventable problems
 - Tolerance of teething problems may reduce over time so still key to monitor

NOTE: Based on the findings and verbatim remarks, we would suggest that respondents understand 'general maintenance' to be factors such as ease of being able to dock and undock a bike and the docking station working as they expect it to be. In many instances if respondents had problems in these areas then they felt the docking station was not working properly.

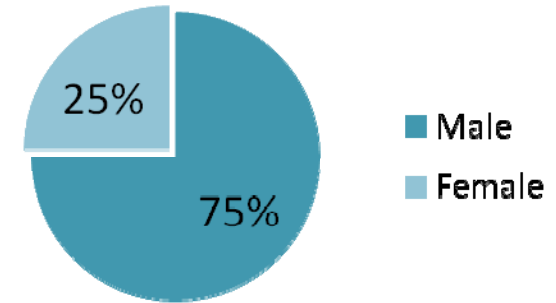
7. Travel behaviour

The profile of those taking part in the Travel behaviour questions is largely similar to those in the CSS (see slide 9)

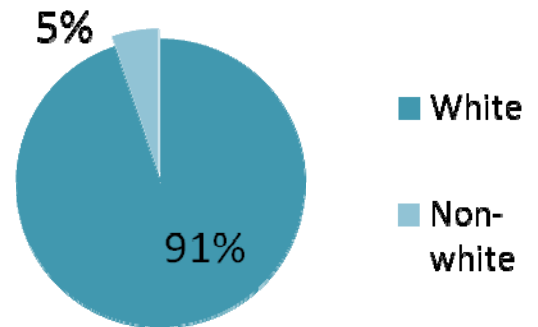
Age



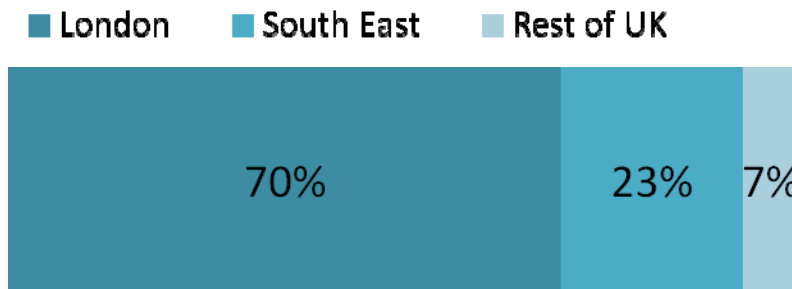
Gender



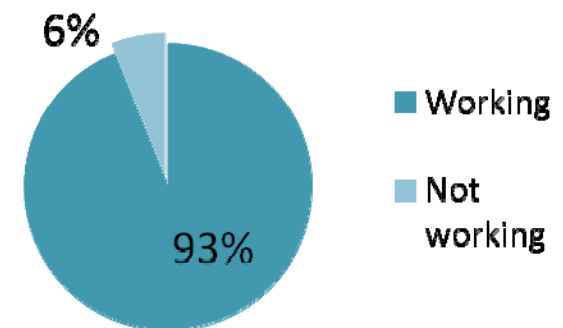
Ethnicity



Region



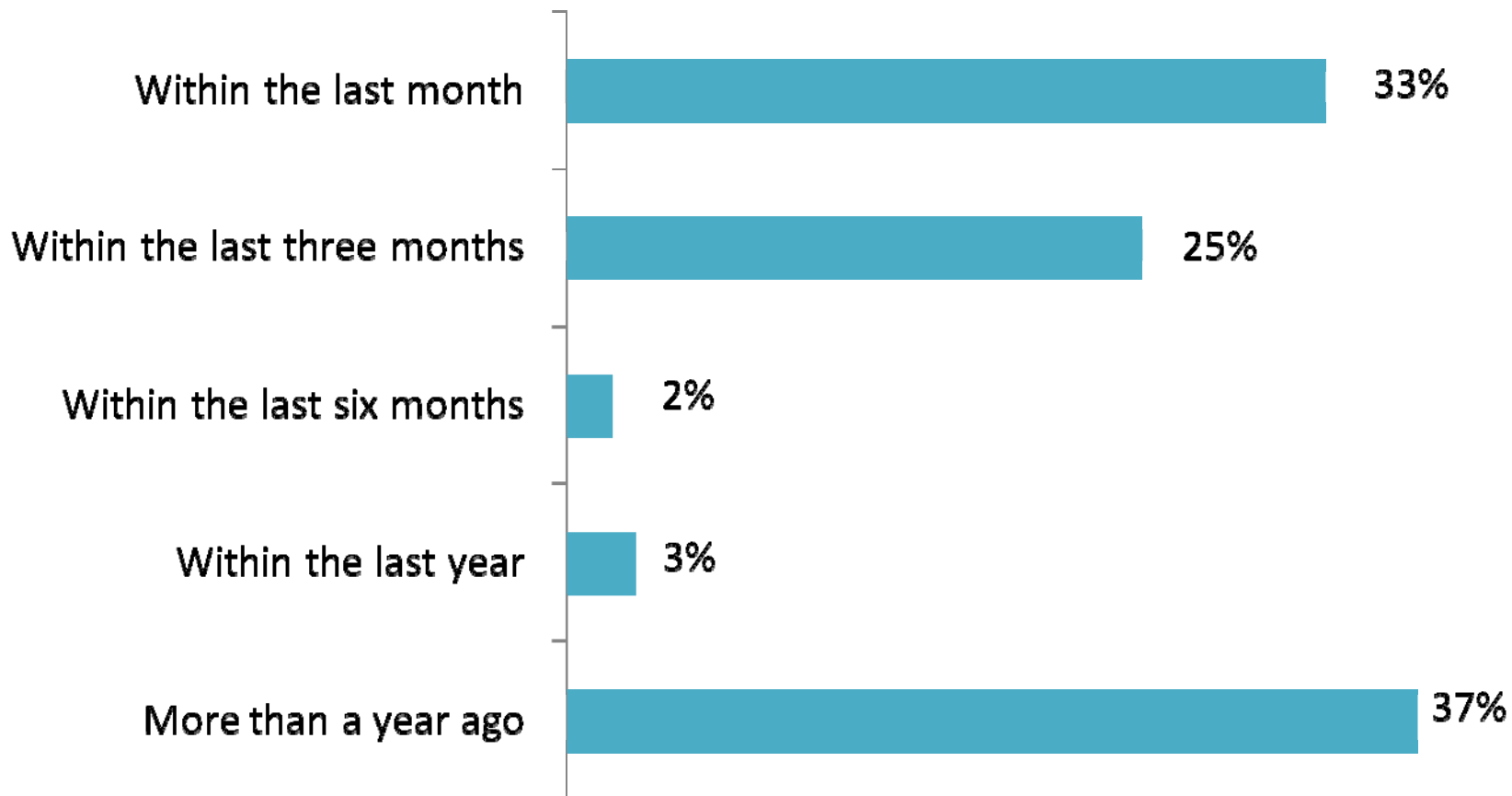
Working status



* 8 people from outside of the UK completed the survey. Data not shown in this chart as this represents less than 1% of the sample

Two thirds have started cycling in London in last 3 months

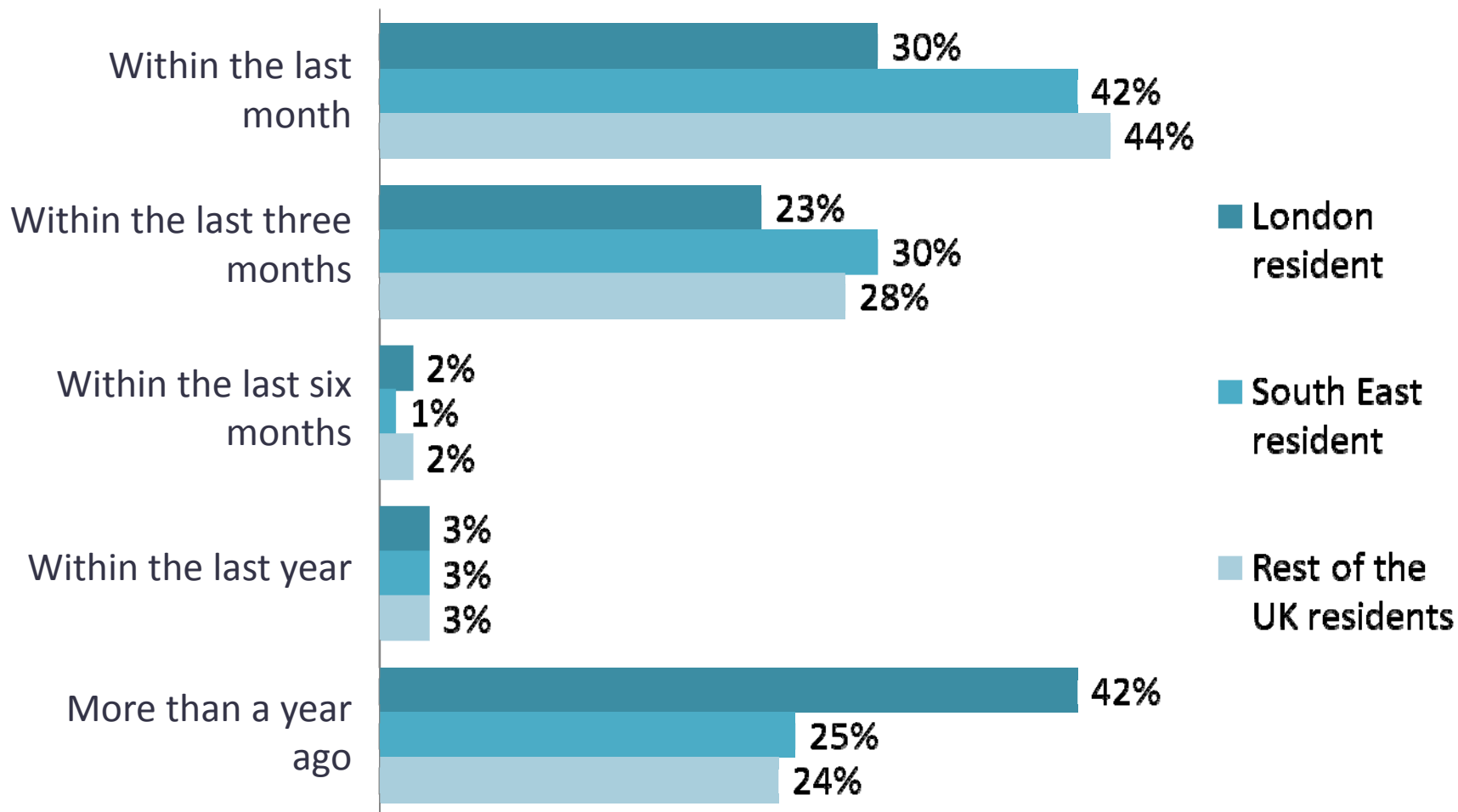
Q When did you start cycling in London?



Base: All users: 3754

Those living in the South East are more likely to have started cycling in London in the last three months

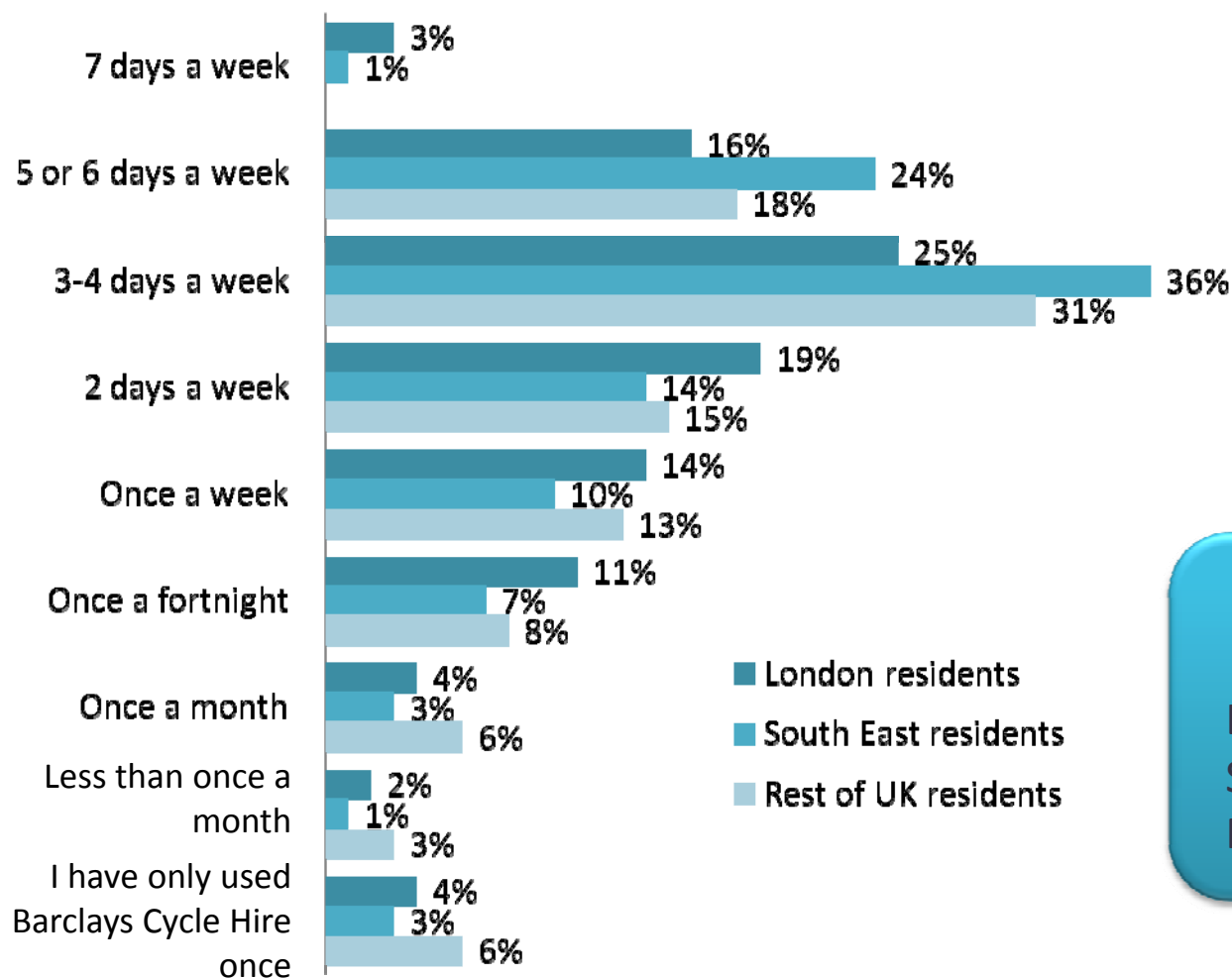
Q When did you start cycling in London?



Base: All users: 3754, London residents: 2752, South East residents: 762, Rest of the UK residents: 232

Those living in the South East are more likely to use the scheme more than once a week

Q On average, how frequently do you use Barclays Cycle Hire for any trips?



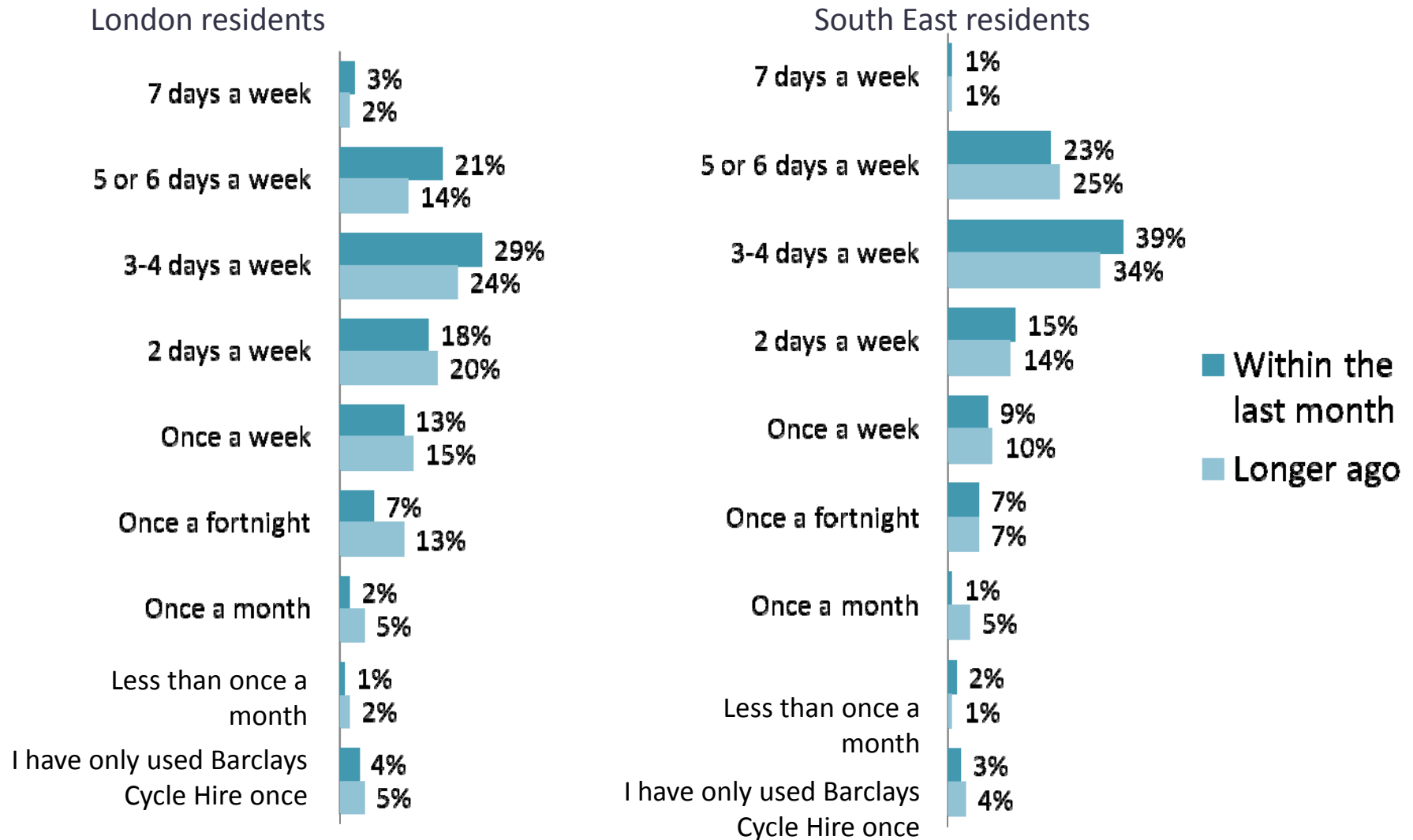
Use the scheme more than once a week

London residents	64%
South East	75%
Rest of the UK	64%

Base: All users: 3754, London residents: 2752, South East residents: 762, Rest of the UK residents: 232

London residents who started cycling in the last month are more likely to use the scheme between 3 and 6 days a week

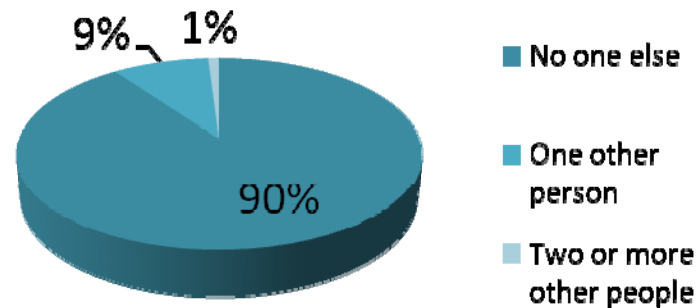
Q On average, how frequently do you use Barclays Cycle Hire for any trips?



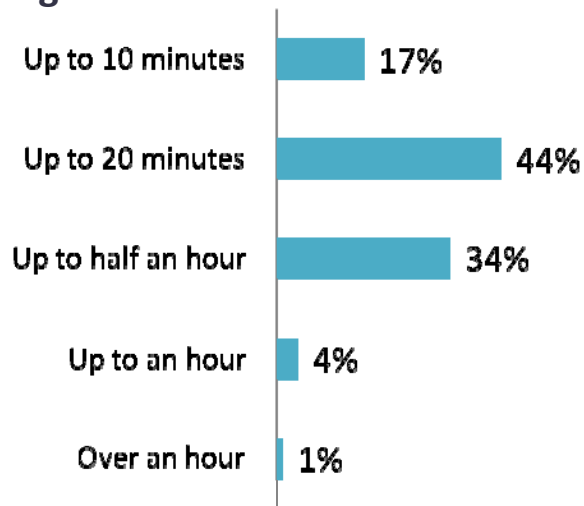
Base: All users: 3754, London residents: 2752, South East residents: 762

Most recent frequently-made journey was most likely to be a commute, half an hour or less in length, during the morning rush hour and made alone

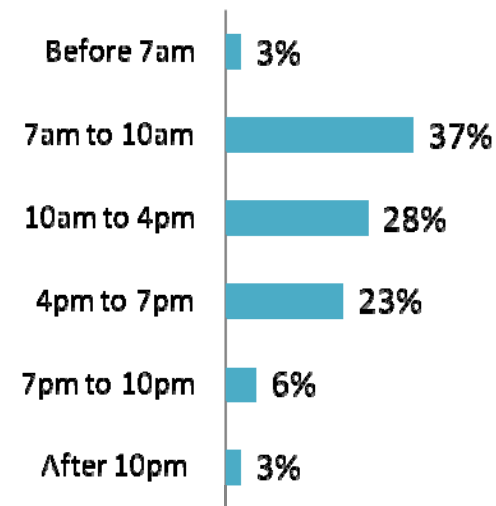
Travelled with other people



Length of hire



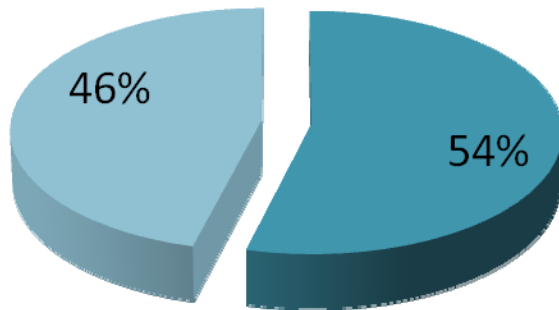
Time of day



Base: All users: 1350

Users' trips are split equally between those using BCH as part of a longer journey and those not. The train is the most popular other mode of transport

Q The last time you made this trip using a Barclays Cycle Hire bicycle, did you use the Barclays Cycle Hire bicycle:

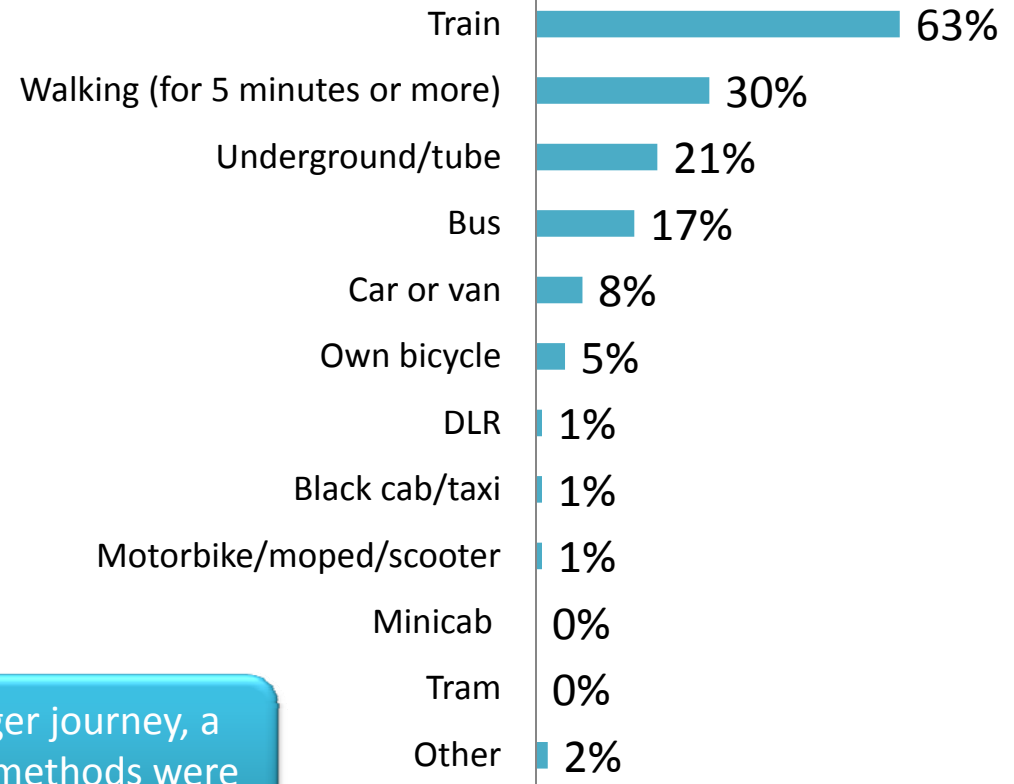


■ To travel all the way

■ As part of a longer journey



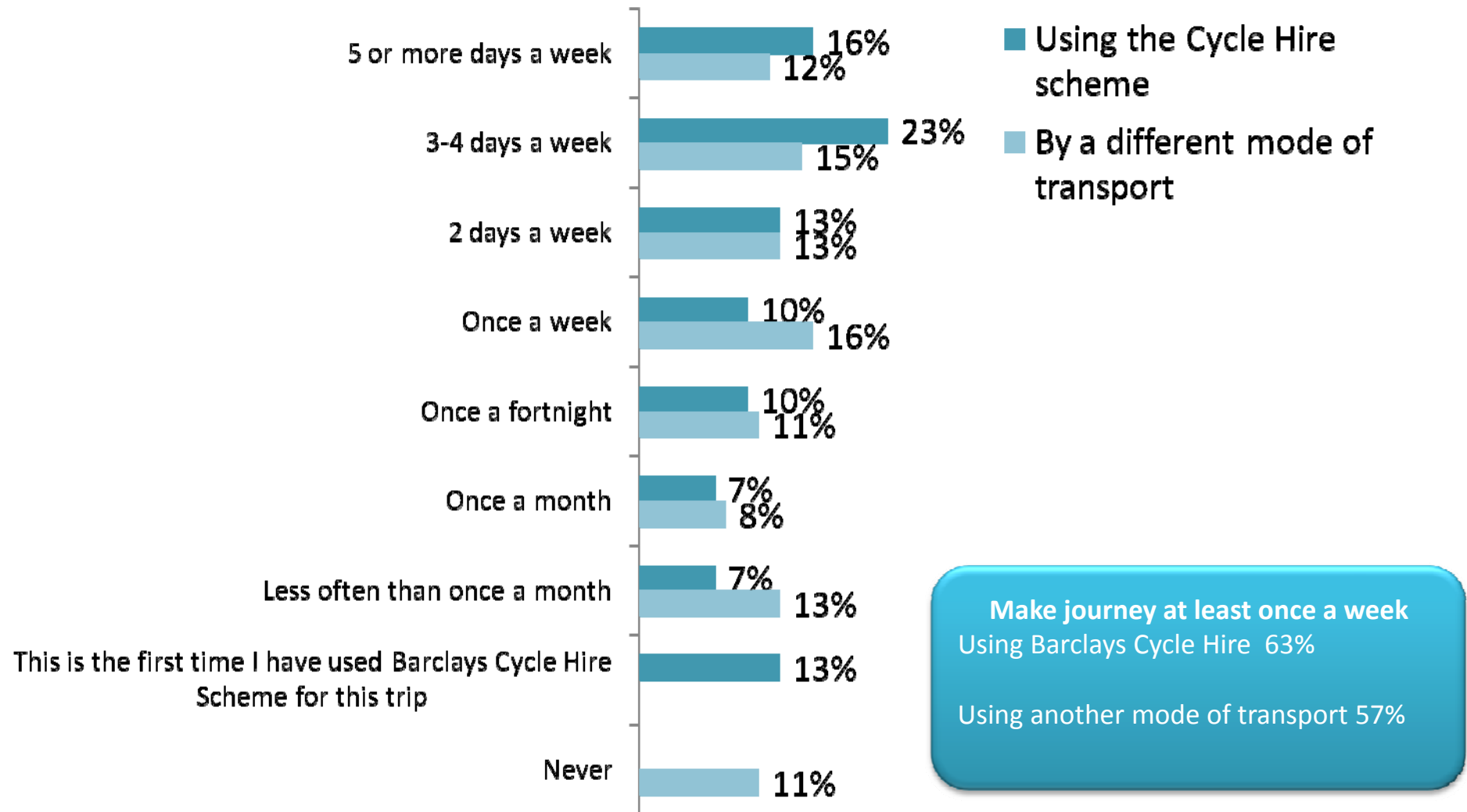
Q What other methods of transport did you use on this journey?



Among those making a longer journey, a range of different transport methods were used

The most recent journey is made more frequently using BCH than other modes of transport

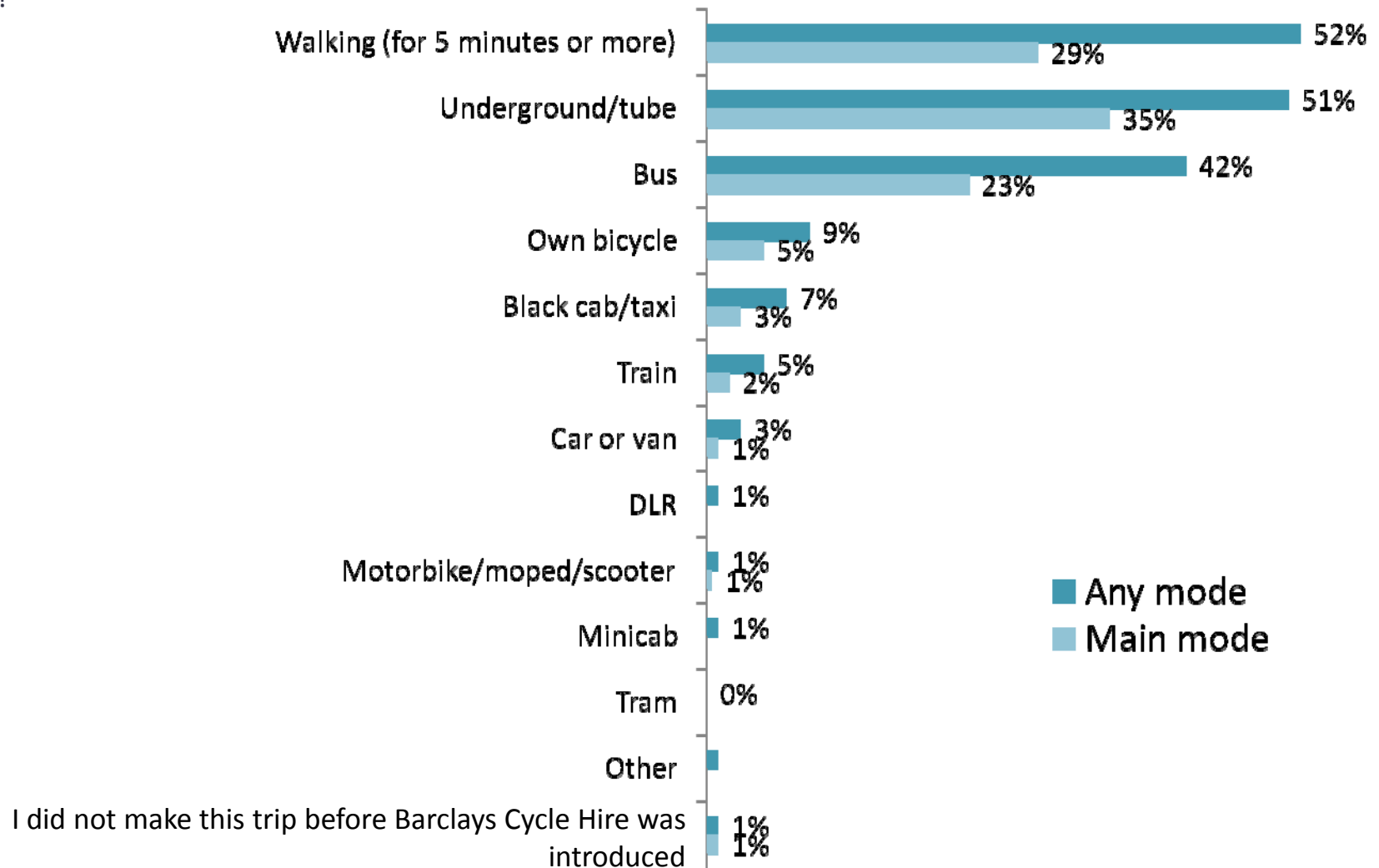
Q How frequently do you make this trip....



Base: All users: 1350

BCH is most likely to have replaced the tube as the main mode of transport on a trip

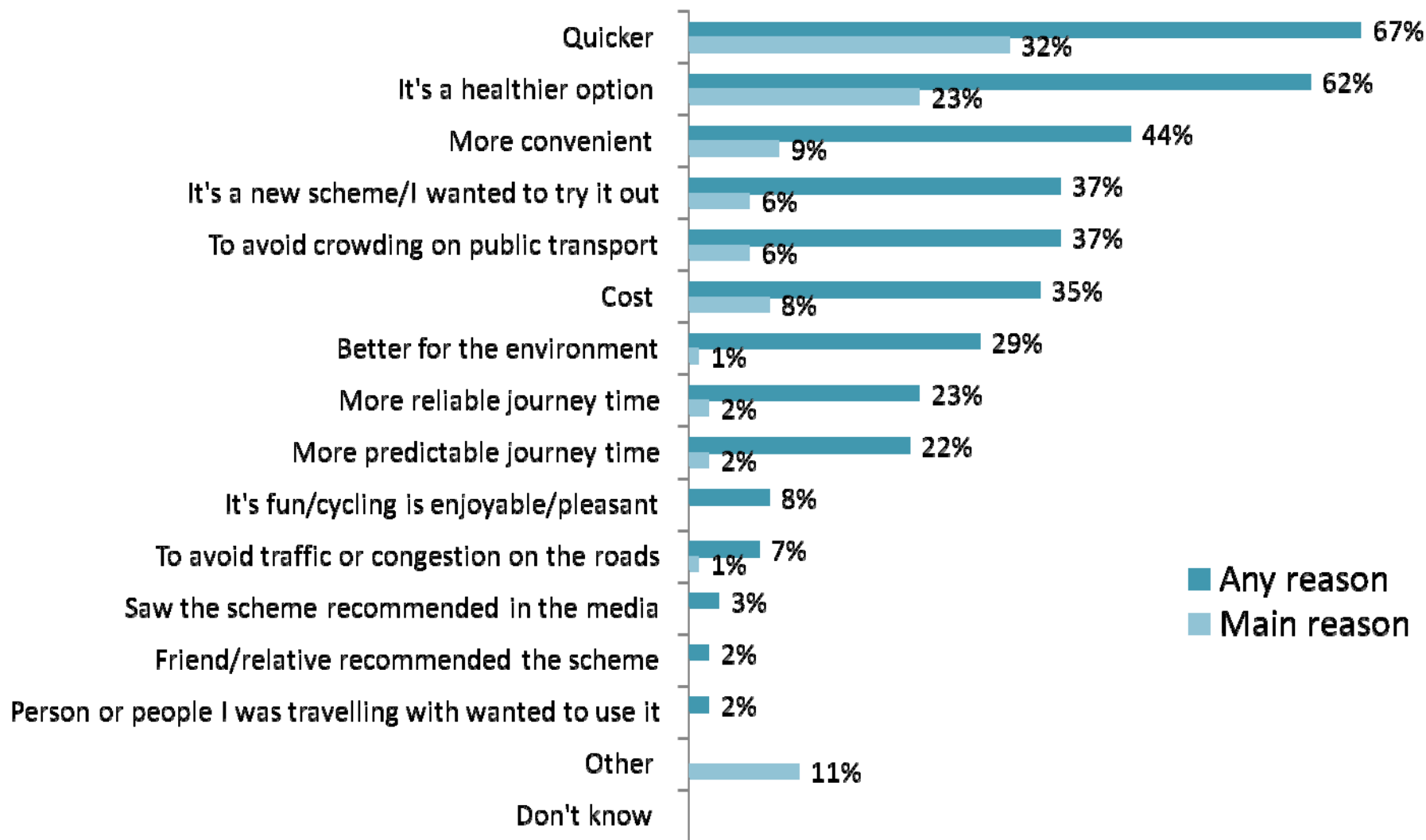
Q Before the Barclays Cycle Hire Scheme was introduced in July this year, how would you typically have made this trip?



Base: All users who have made this trip before using Barclays Cycle Hire: 1199

The health and time saving benefits of BCH are most likely to have prompted a move to this transport mode

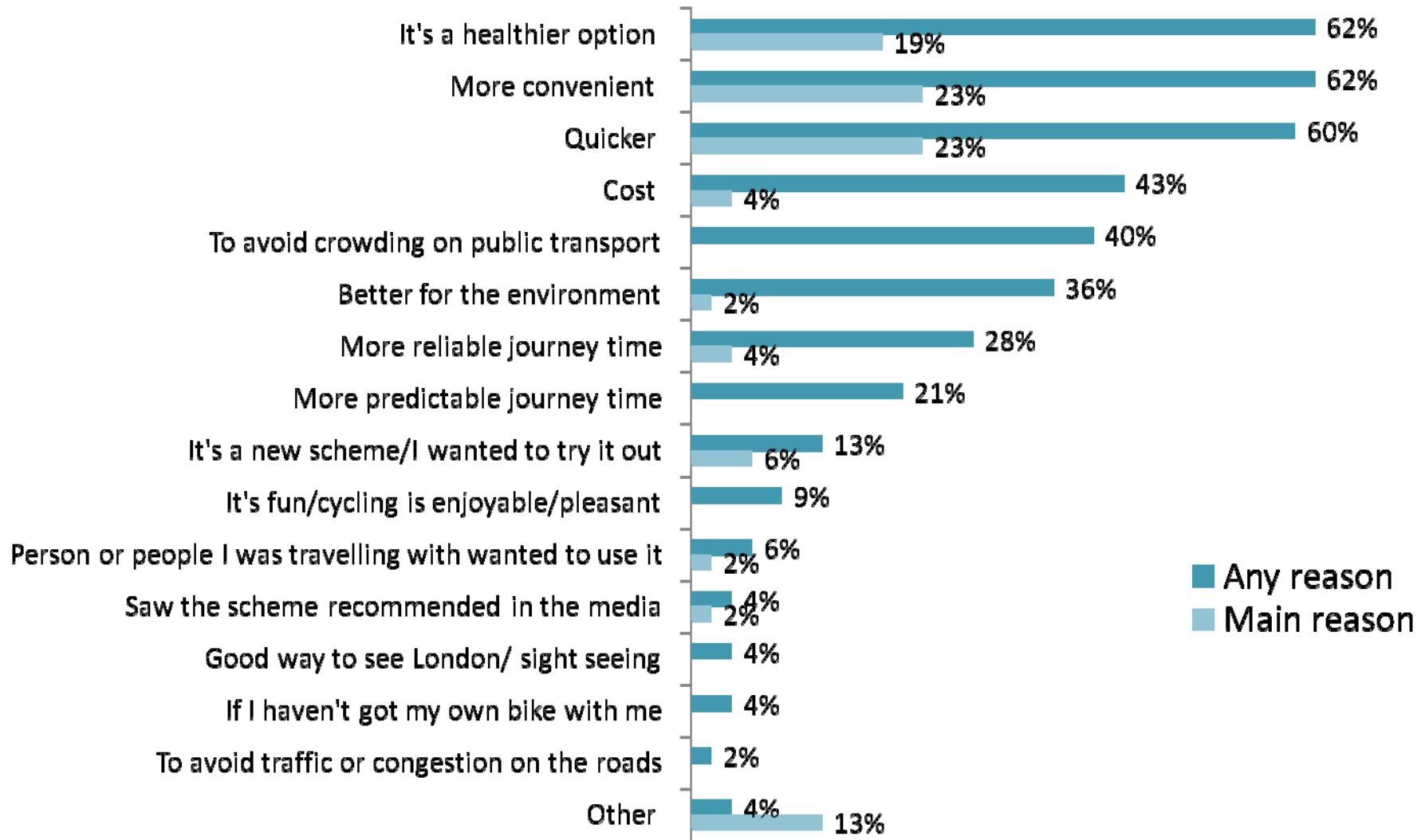
Q Why have you switched from travelling by [MAIN MODE] to using a Cycle Hire bicycle for this trip?



Base: All users who have made this trip before using Barclays Cycle Hire and made the trip before July: 1183

For those not having made the journey before, health benefits, speed and convenience prompted them to use BCH

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



Base: All users who have not made the journey before: 47