

Barclays Cycle Hire
Membership Profile
Report
Job number: 11209
March 2012

Summary

Background and objectives

Barclays Cycle Hire is a well liked addition to the London transport network, however little is known about scheme members

- Since its launch in 2010, Barclays Cycle Hire (BCH) has proved a popular and efficient means of enabling Londoners and visitors to travel around the Capital in an enjoyable and healthy way
- Research objectives were to:
 - Form a better picture of who uses the BCH cycles in order to inform service development
 - Provide evidence around BCH app use by members
 - Understand BCH members' behaviour in terms of wearing a helmet and cycle specific clothing
 - Assess BCH members' likelihood to attend the London 2012 Games, and their plans to use BCH cycles as a mode of transport to get to the Games
- A short online survey of BCH members was undertaken between 16th and 30th March 2012
 - A total of 29,086 survey invitations were sent
 - 4,789 members responded to the survey (a response rate of 17%)
- In addition, a successful small-scale trial was undertaken using an SMS survey approach
 - A total of 1,500 SMS invitations were sent
 - 88 members responded to the survey by SMS (a response rate of 6%)
 - Results from the SMS trial are included in the appendix to this report

Key findings

Member profile

- The typical BCH member who responded to the survey is male, 25-44 years old. Men are more likely than women to use the scheme when aged over 34 years.
- White males make up the majority of the members who responded (72%)
- Almost three quarter of members live in London (most commonly in central London). 28% are from elsewhere in the UK
- The majority work full-time and have household incomes in excess of £75,000 pa
- 8% are disabled or have a long-term health condition

Key findings

BCH members' use of the scheme

- Most have been members for at least one year and use BCH cycles at least once a week. The largest group of members report using the scheme 3-4 days per week and over one quarter use the scheme 5 or more days per week
- Approximately half of all members plan to use the scheme in the expansion area. This number is significantly higher if members live (97% plan to use scheme in expansion area) or work (91%) in the area
- The majority never wear a helmet or cycle-specific clothing, but one third wear a helmet and or cycle-specific clothing at least occasionally
- Half of the members surveyed are planning on attending the London 2012 Games. 27% of these members expect to use the BCH scheme to get to the Games
- Overall, the scheme is very well received. The SMS survey revealed high levels of satisfaction. Key suggestions for improvements from those responding by SMS centre around having more, better maintained bikes available and more free space at docking stations, with up-to-date information about this available through apps

Key findings

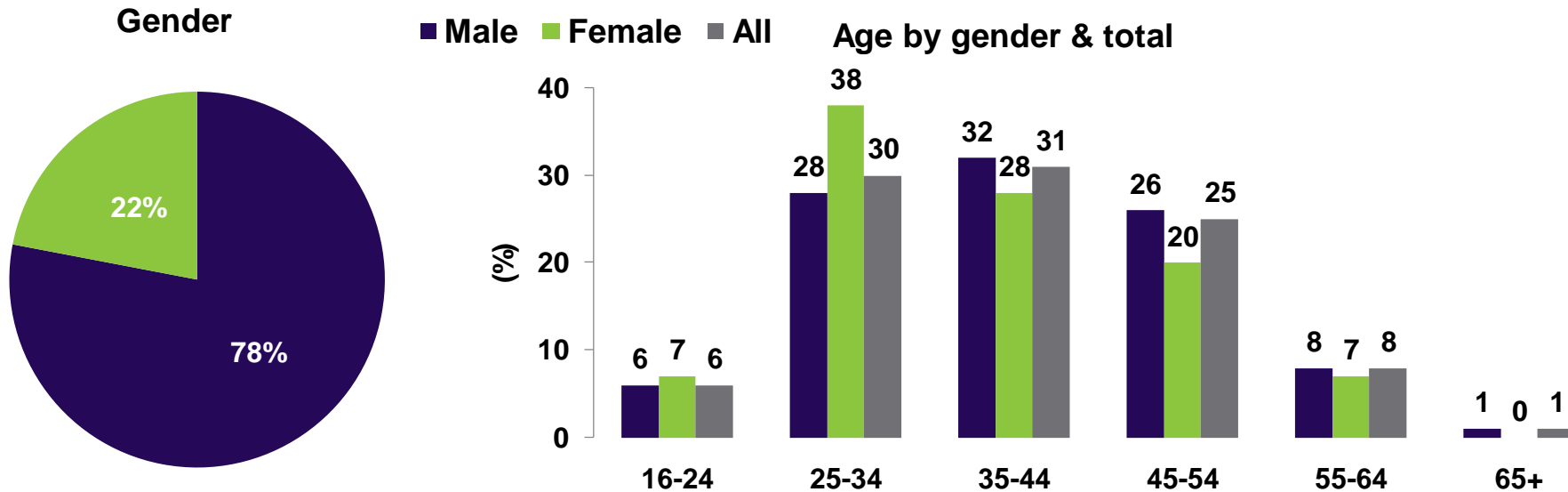
BCH members' use of technology

- Apps are commonly used by members and appear to be more heavily relied upon than the TfL website. The two most used apps were BarclaysBikes, the official Barclay's Cycle Hire app, and London Cycle
- Regardless of the app used, the most commonly requested improvement was more up-to-date information about availability of bikes and empty spaces at docking stations
- Awareness of the @BarclaysCycle Twitter feed is low among members
 - 3% of members follow the feed, but 78% have not heard of it

Member profile

Age and gender

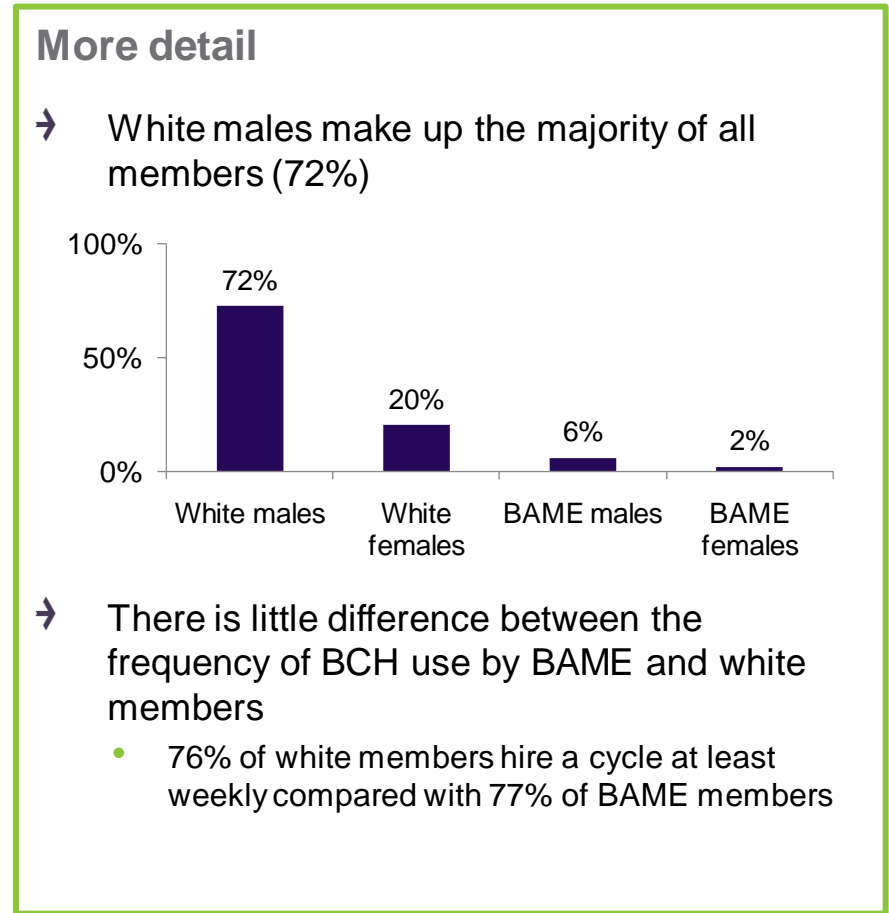
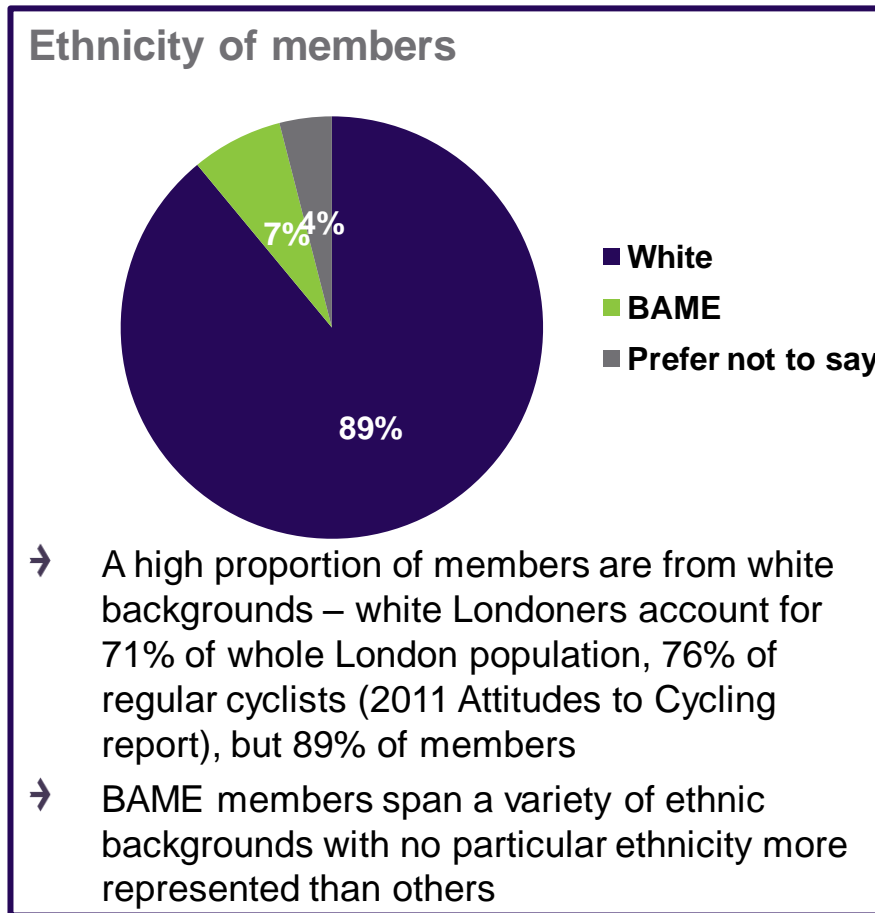
The majority of members are male aged 25 - 54



- Over three quarters of Barclays Cycle Hire members are male, this is a high proportion even after accounting for the greater proportion of regular cyclists generally who are male (The 2011 Attitudes to Cycling survey recorded 71% of regular cyclists as male)
 - This is in line with the database of members provided by TfL where 79% are male
- The majority of members are aged between 25 and 54 years old

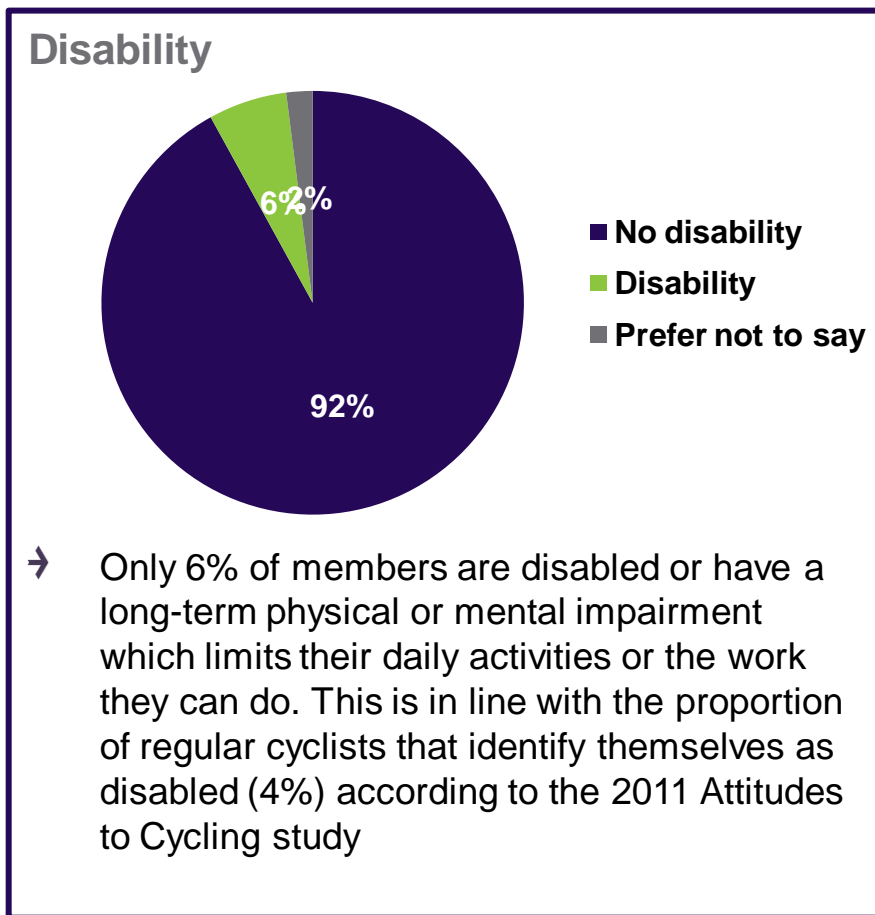
Ethnicity

Members are more likely than general Londoners and Londoners that are regular cyclists to be white



Disability

The proportion of disabled members or those with a long-term health condition is low, but in line with profile of all regular cyclists (not just BCH members)



More detail

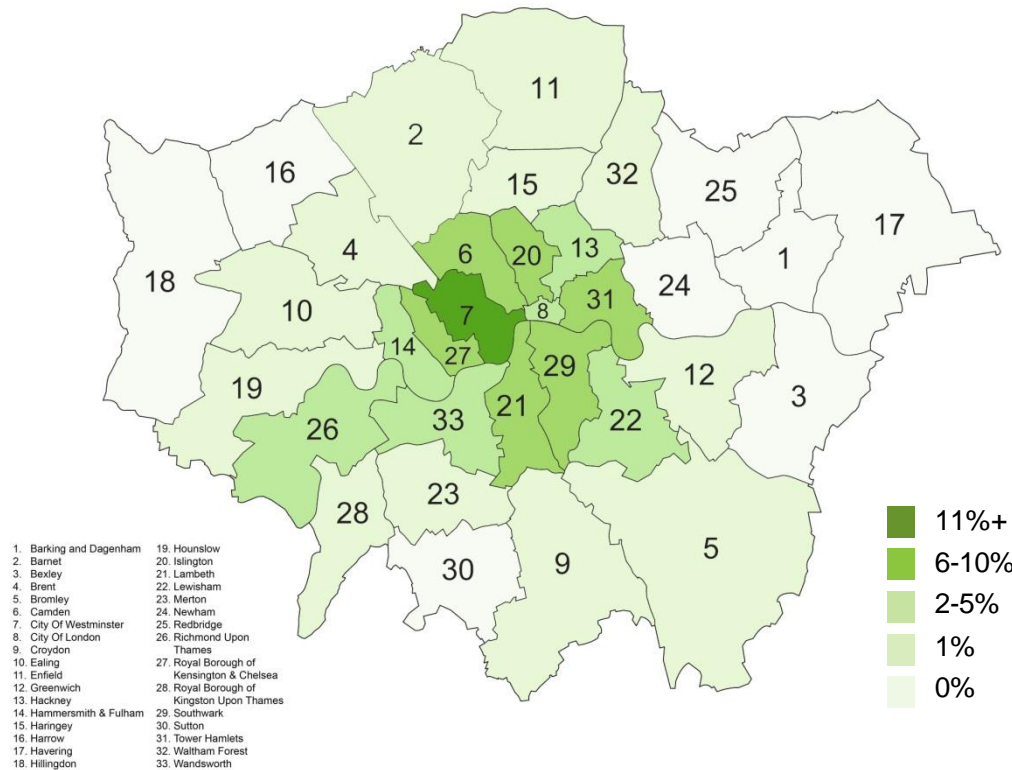
- Asthma is the most common impairment – noted by 3% of members
- There is little difference in frequency of use by disabled and non-disabled members
 - 76% of non-disabled members use a BCH cycle at least weekly, compared with 73% of disabled members

Q8E: Do you have any long-term physical or mental impairment which limits your daily activities or the work you can do, including problems due to old age? (Base: all 4,789)

Where members live

Three in ten members live outside London

→ 71% of members live in London



→ Members most commonly live in central London

- 16% of London members live in Westminster
- 10% live in Islington
- 10% live in Southwark

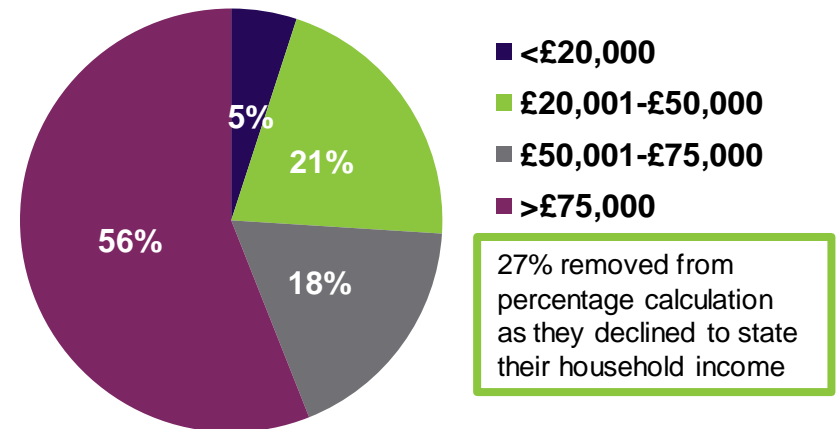
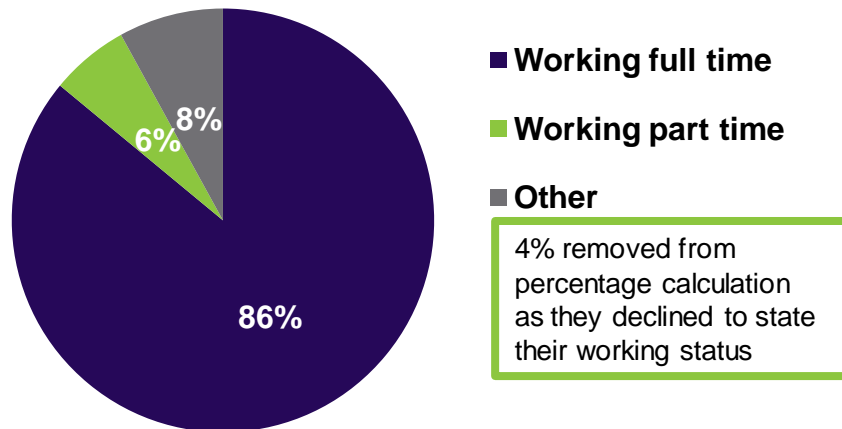
→ 28% elsewhere in the UK – mainly home counties

→ 1% live overseas – including European countries and further afield

Income and working status

Members generally work full time and have a high household income

- Almost two-thirds (63%) of members live as a couple
 - 30% do not
 - 1% prefer not to say
- On average, members live in households with 2.1 adults
 - 19% live alone, 56% live with one other adult, 18% 3+ adults, 8% prefer not to say



- The majority are working full time, and have high household income levels – in-excess of £75,000 pa

Q11. Are you living with someone else as a couple? (Base: all 4,789)

Q12. How many adults, including yourself, live in your household? (Base: all 4,789)

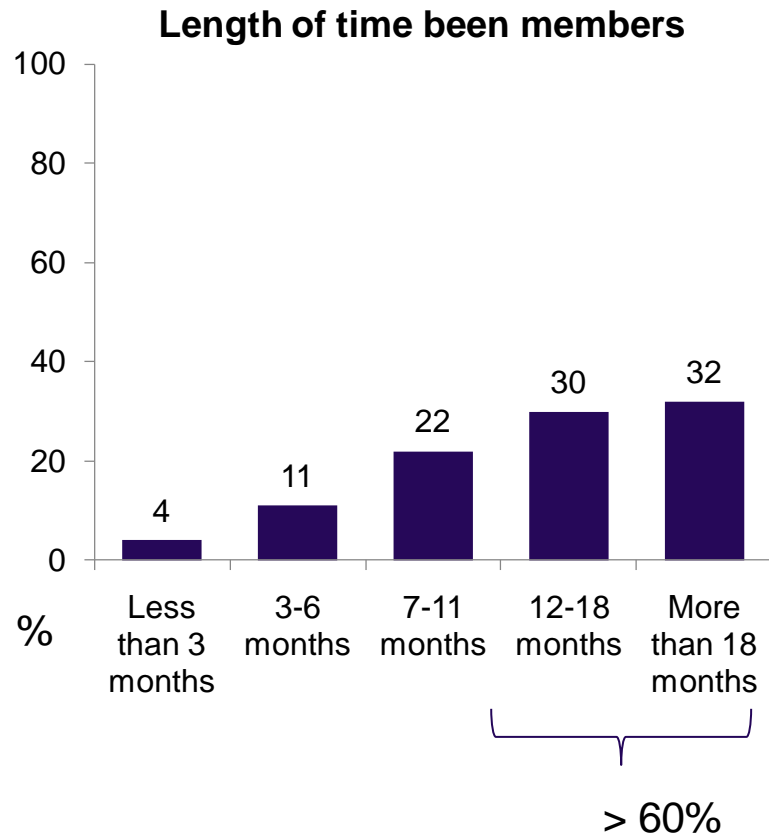
Q13. What is your total gross annual household income? This is income from work and any other sources such as benefits and pensions, before deductions e.g. income tax, National Insurance. (Base: all 4,789)

Q14. Are you...[working status]? (Base: all 4,789)

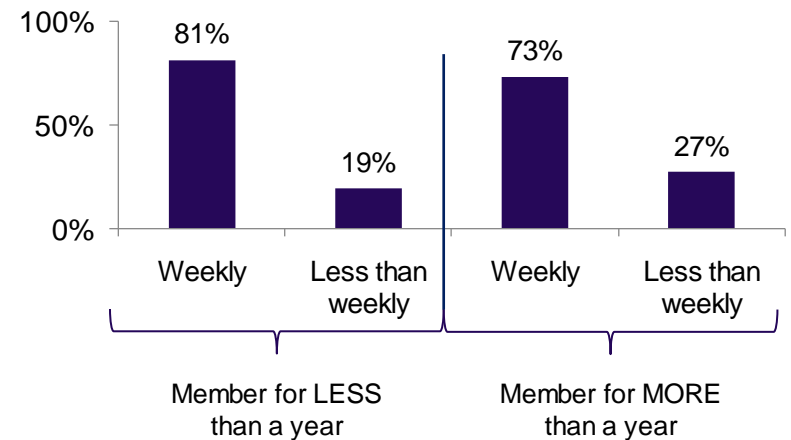
How members use BCH

Length of membership

Most have been members for at least a year and use BCH cycles at least once a week



→ The majority of members have been with the scheme for over a year taking them past their renewal date



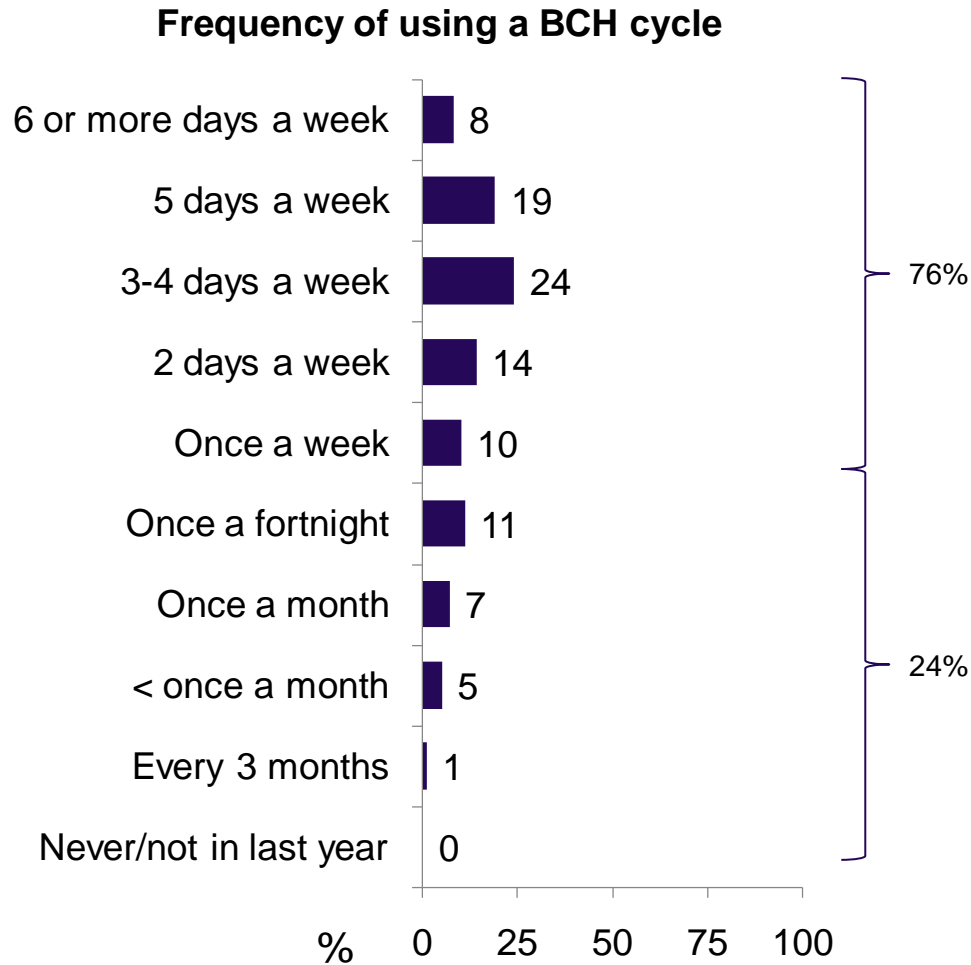
→ Those that have been members for over a year are slightly less likely to use a BCH cycle each week; but still three quarters do use the scheme at least weekly

Q1. How long have you been a Barclays Cycle Hire member? (Base: all 4,789)

Q2. How frequently do you use Barclays Cycle Hire bicycles? (Base: all 4,789)

Frequency of use

The largest proportion say they use the scheme 3-4 days per week. Over one quarter 5 days a week or 6 or more days a week



→ The sample provided by TfL indicted members use of the scheme. The table compares a calculation based on the stated frequency and the actual hires from the TfL database – the figures are broadly in line given that the questionnaire based estimate is calculated form bands

Frequency in last 3 months	From questionnaire	From sample
Mean	21	18

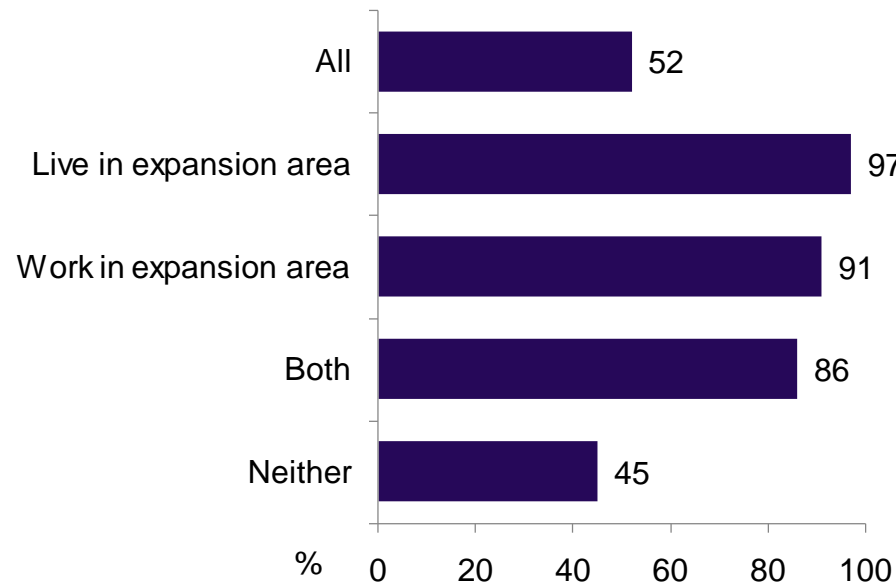
→ 13% of the BCH member database supplied by TfL have used the scheme only once in the last 3 months – indicating a slight over reporting of use

BCH expansion

High expectation amongst those living and working in the expansion area that they will use the scheme there

- ➔ Most current BCH members do not live or work in the expansion areas
 - 6% live in the area
 - 5% work in the area
 - 1% both live and work in the area
- ➔ Almost all of those living and working in the expansion area will definitely or probably use the BCH scheme in these areas

Probably or definitely will use BCH in expansion area



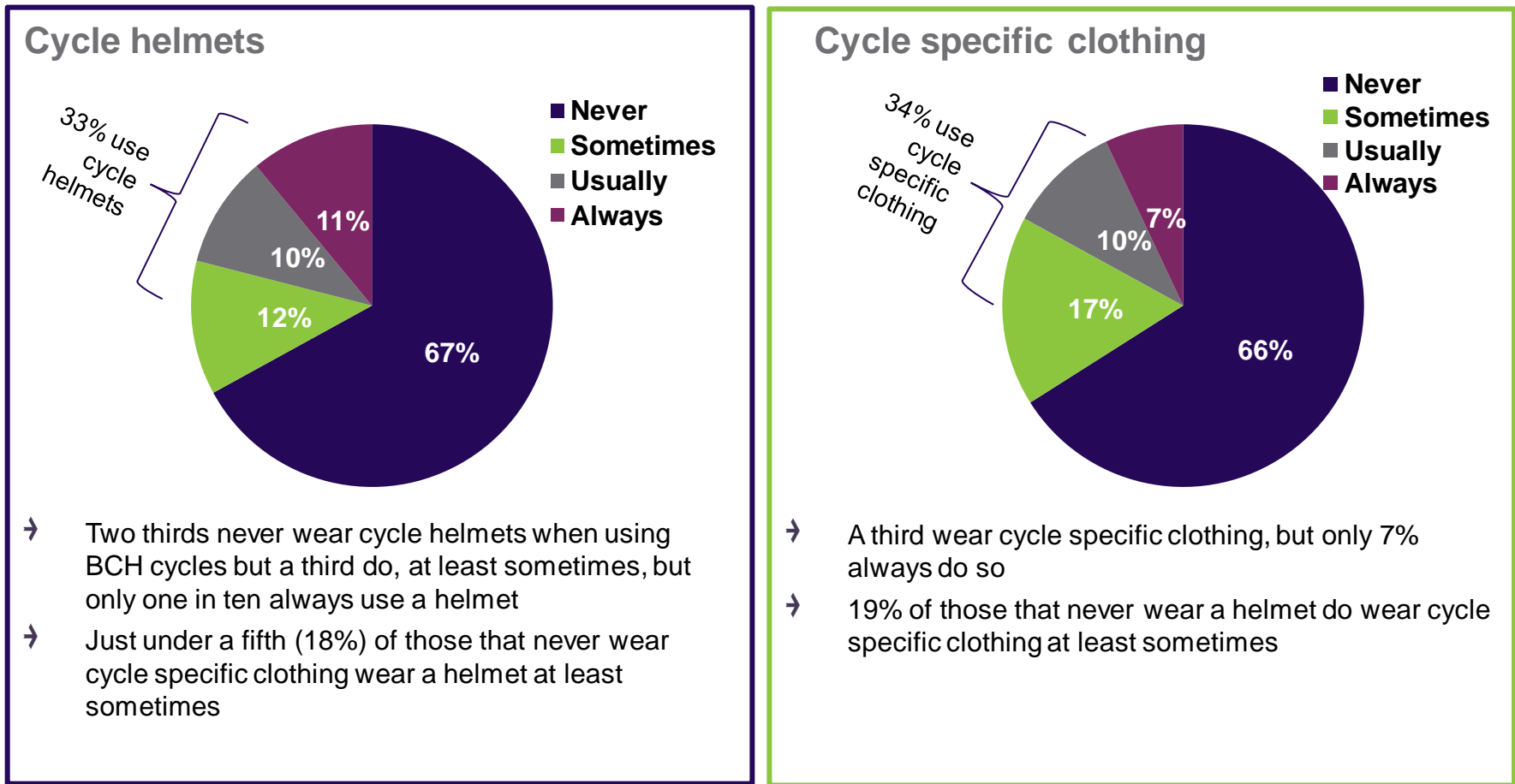
Q5a. Now that Barclays Cycle Hire has expanded to the East and West, how likely are you to use it in the Expansion Area? (Base: all 4,789)

Q5b. Do you...[live in the expansion area]? (Base: all 4,789)

Cycle safety equipment

Almost half of Londoners wear a helmet or cycle specific clothing at least sometimes

54% of members never wear a helmet or any cycle specific clothing



Q4a. How often, if ever, do you wear a cycle helmet when using Barclays Cycle Hire bikes? (Base: all 4,789)

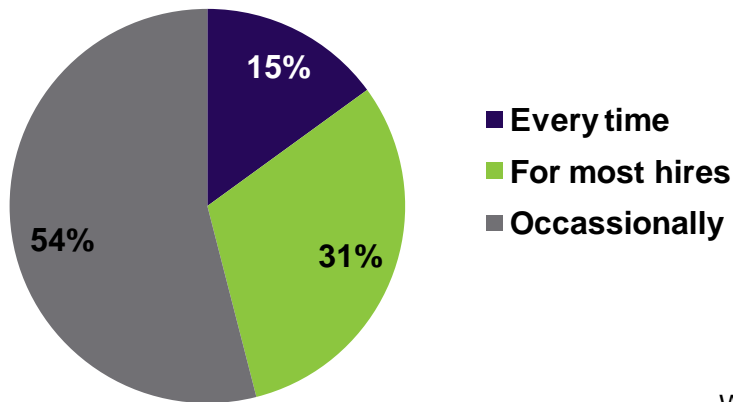
Q4b. And how often do you wear any cycling-specific clothing or accessories when using Barclays Cycle Hire bikes (e.g. cycling jacket/ tabard for high visibility) (Base: all 4,789)

Mobile phone apps

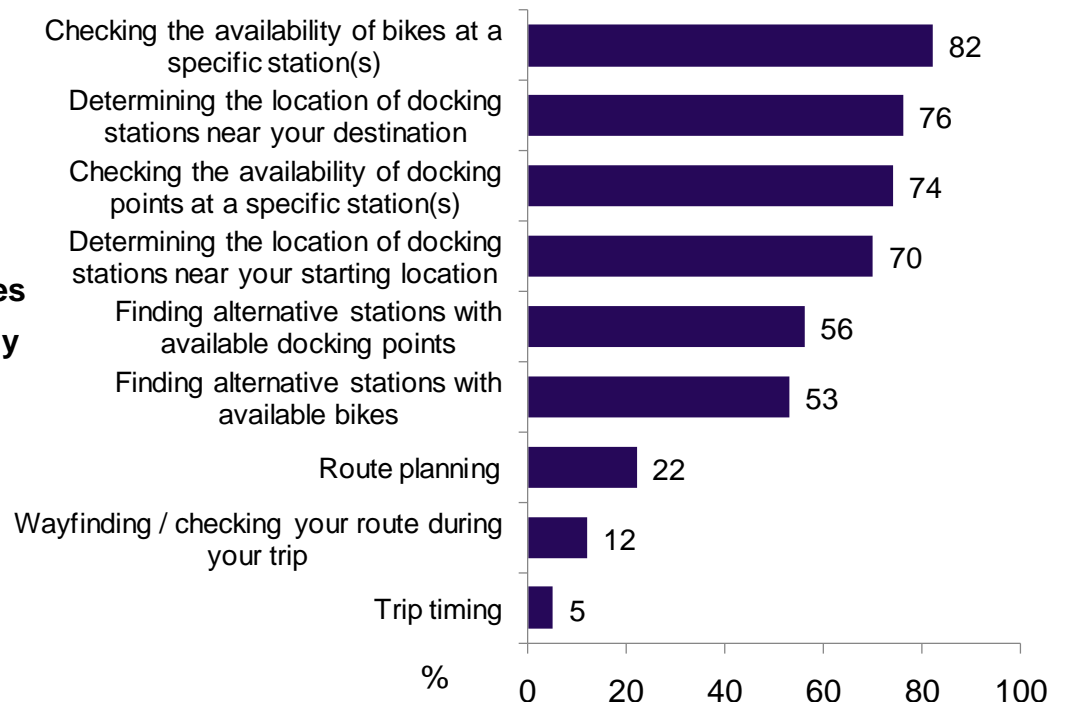
Apps are commonly used by members

- Over half (55%) of members use a mobile phone app in relation to Barclays Cycle Hire
 - 14% reported that they do not have a smartphone
- Almost half use apps for most or all hires
- Main features used are checking nearby availability of bikes and docking stations

Frequency of using app



Features/functionality regularly used



Q2A. Do you use any mobile phone apps in relation to Barclays Cycle Hire? (Base: all 4,789)
 Q2C. How frequently do you use an app when hiring a Cycle Hire bike? (Base: all those using apps 2,484)
 Q2D. What features / functionality of these apps do you use? (Base: all those using apps 2,484)

Most frequently used apps

At least half of those using apps use Barclays Cycle Hire App or London Cycle

- The two most mentioned apps are Barclays Cycle Hire App and London Cycle
- Other apps mentioned included:
 - Bixou
 - Boris Bikes
 - Cycle Hire
 - Spot Cycle
 - Yell for Bikes



Other features in an app

Greater accuracy of cycle availability is the most commonly requested improvement; also there were suggestions for personalised interactions (e.g. fun personal facts, account management, favourite stations)

App user suggestions

- Most commonly mentioned was better accuracy on availability of bikes or space at docking stations
 - *“Accurate results as to whether there are any spaces at stations. They are not always up to date.”*
 - *“Accurate real time information of bike availability!”*
- Other suggestions were to introduce some more fun options such as:
 - Distance cycled to date
 - Number of hires to date
 - Favourite docking stations
 - Calories burned*“Have some fun with scoreboards, miles cycled etc”*
- As well as including information about things to do around a docking station

Other suggestions

- There is a desire to be able to provide feedback on the scheme through an app, and to be able to report broken bikes and other malfunctions
- Other suggestions for improvements included:
 - Account management features
 - Route planning, including more routes through parks and ‘safe areas’
 - Integration with official London cycle maps

Further information requested on website

The BCH website is not a significant element of the scheme for members compared to apps and the network itself

- Fewer members either use the website or have feedback that would encourage them to use it more
- Some mentioned finding the site difficult to navigate and the maps difficult to use
- Some also mentioned that information about when and where TfL would be restocking cycles would be useful

*“A better journey planner and docking station finder.
The docking station map is very cluttered.”*

- On top of these suggestions, many said that apps were more useful to them than the website, and others mentioned that to encourage them to use the scheme more attention should be paid to other issues rather than website improvements

“Improving the service itself is more important to me than the website i.e. improving the availability of docking stations/bikes and making sure that bikes are serviced more regularly/replaced when they get too worn.”

Improvements to BCH

The most frequently mentioned improvement was to have a better distribution of the bikes and greater availability of bikes/docking stations. Improved bike maintenance, key reliability and further expansion were also often mentioned.

Bike distribution/ greater availability

- *“Distribution management: so frustrating when you go to drop off but no spaces so it ends up taking longer than it would have to walk or take public transport”*
- *“Increase the availability of cycles AND free spaces in all docking stations, in particular during “rush hour”*
- *“Lower ratio of bikes to docks...Many of the docking stations are full, and you go to the next station and it’s full too. This happens too often!!! :(“*

Bike maintenance/ reliability of key

- *“Keep all the bikes in A1 condition with fully inflated tires and working bells.”*
- *“The brakes and gears are very varied. Sometimes dangerous”*
- *“Better maintenance. Approx. 75% of the bikes are damaged. 10% badly damaged”*
- *“The key cards to use the bikes are terrible. Mine never works when I try to hire a bike...and I am dissuaded from using the bikes.”*

Further expansion

- *“South”*
- *“Southeast to Bermondsey”*
- *“I think the scheme should reach as far as Hammersmith in the West and Kentish Town in the North”*
- *“Extend it Northwards to include Islington!”*
- *“Move it further East”*

Improvements to BCH

Other less common suggestions included better info on next available docking stations and improvements to the customer service

More precise information at docking stations about alternative locations when full

- “The info on the bike hire points could be more helpful in describing where an alternative dock is ‘xxx street’ does not help a lot. Perhaps mark them on the map?”
- “When you arrive at a bike stand that doesn’t have any spaces free, the stand should tell you where the nearest free bike space is. It’s very annoying to cycle around for ages trying to find a free space and not knowing where they are.”

Customer service

- “The call centre is unpredictable and the staff are rude”
- “The customer service on the phone is terrible. I’ve never once got to speak to someone who can help in a reasonable time.”
- “The call centre is **ABSOLUTELY TERRIBLE**, right down to the badly designed automated call handling. Most of the time you get through to a message centre pretending to be a help desk. No one ever calls you back”
- “You absolutely must have better, immediate, customer service.”

@BarclaysCycle

Over 5,000 people follow @BarclaysCycle – but only a small proportion of members

- 3% of members follow the @BarclaysCycle Twitter feed
- 78% of members had not heard of the feed



The screenshot shows the Twitter profile for Barclays Cycle Hire (@BarclaysCycle). The profile includes a header with the account name, handle, and a bio: "The official account for information & updates from Barclays Cycle Hire, a public bicycle sharing scheme for short trips in central London." Below the bio is a location "London" and a website link "http://www.tfl.gov.uk/barclayscyclehire". The profile statistics are: 222 TWEETS, 56 FOLLOWING, and 5,356 FOLLOWERS. There is a "Follow" button and a "View more Tweets" link. The tweet feed shows three tweets from the account, all dated in March.

Account Name	Handle	Tweets	Following	Followers
Barclays Cycle Hire	@BarclaysCycle	222	56	5,356

Barclays Cycle Hire @BarclaysCycle 21 Mar
Enter the Barclays #LondonbyBike photo competition & capture the essence of Barclays Cycle Hire on.fb.me/LondonbyBike

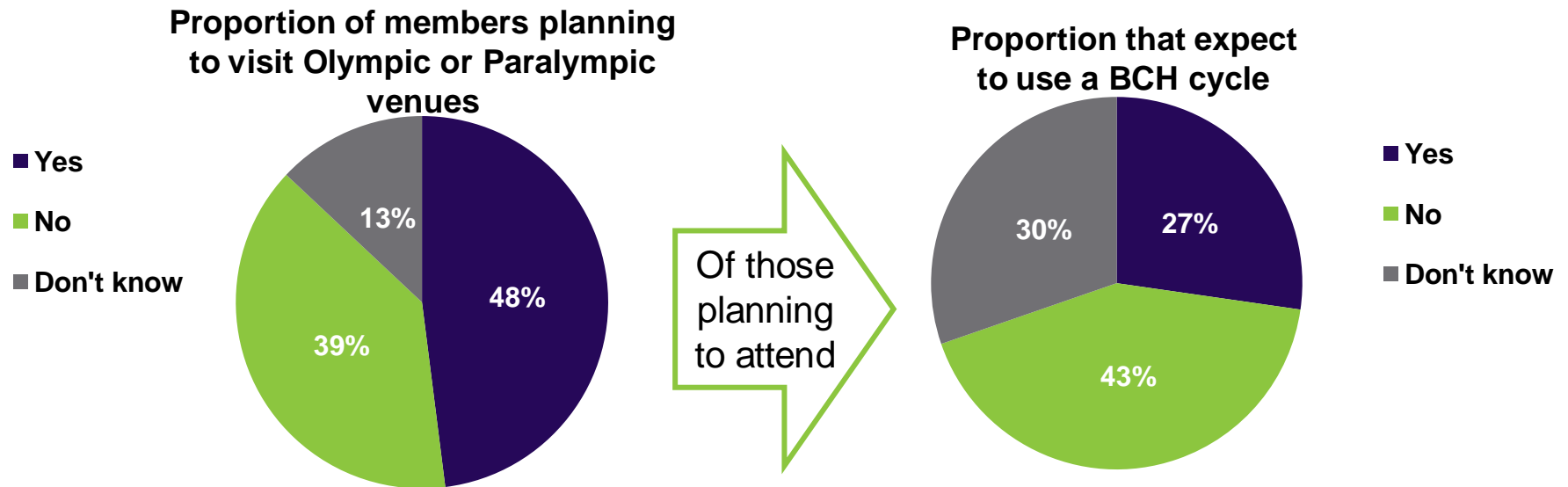
Barclays Cycle Hire @BarclaysCycle 13 Mar
When returning your BCH bike, the green light indicates the journey has ended. Your usage charge is calculated to this point #cyclehire

Barclays Cycle Hire @BarclaysCycle 8 Mar
"Like a kid in a candy store – Barclays Cycle Hire brings out the smiles in east London #cyclehire" twitpic.com/8tlvs2

London 2012 Games

BCH is an important mode for this group to get to the Games

- Half of members are planning to visit an Olympic or Paralympic venue during the London 2012 Games
- Amongst those that are planning to visit a Games site, 27% expect to travel there with the aid of a Barclays Cycle Hire cycle



Q6 - Are you planning to visit any of the Olympic or Paralympic venues during the games? (Base: all 4,789)

Q7 - Do you expect to use a Barclay Cycle Hire bicycle to get to the Games? (Base: those planning to attend 2,296)

Further comments

There are many very satisfied and loyal members.

I am so glad that it has expanded to Camden and think that the scheme has vastly improved over the last 12 months!
Thank you

Keep it up, it's a fab scheme and means I don't have to use the tube or walk!

I think it has been a fantastic success. I really find the cycles useful and it has got me exercising much more

The new '20/21/22' series bikes are a dream to ride but they highlight the need for regular maintenance on the original, older bikes

Absolutely brilliant scheme, please extend everywhere!

Appendix - SMS survey results

Background

Background and Objectives

- As part of the Barclays Cycle Hire (BCH) customer profiling research, TfL undertook a small scale SMS survey.
- TfL supplied an extract of their member database, from which 1,500 customers were sent an SMS inviting them to take part in the study
- The survey requested feedback on members':
 - Age
 - Gender
 - frequency of use
 - satisfaction levels and
 - areas for improvement

Considerations

- A reduced version of the profile survey questionnaire was used in the SMS approach. For SMS surveys there is a limitation of 160 characters per SMS/question and to comply with this survey questions were pared down and standard abbreviations used
- As the reply SMS from the respondent potentially carried a charge (depending on whether this was included within their mobile phone tariff), there was a need to be transparent in the initial approach and make it clear that this is not a 'freephone' service
- In order that this research may form part of TfL's current project to build a database of customers linking survey responses with membership details (Oyster number, BCH number etc) and in keeping with the market research code of conduct the fact that this information would be made available to TfL was also highlighted in the initial SMS message

Method

Approach

- BCH members received an introductory SMS inviting them to participate in the survey. If the member replied '1' the survey was initiated; if they did not send any response no further communications were sent
- The pilot survey invites were sent between the 16th and 20th March
- 1,500 invites were sent in order to achieve a reasonable sample return on the basis of 5-10% response rate
- Both full and partial responses were used in the final analysis

Response rate

- Total number of fully complete surveys 79
- Total number partially complete surveys 9
- Total response rate (88/1,500) 6%

Questionnaire

TEXT 1: Please take a moment to tell TfL about Barclays Cycle Hire - respond 1 to complete a survey. Answers will be available to TfL. Txs charged at your stnd rate.

TEXT 2 How satisfied are you overall with Barclays Cycle Hire scheme? Please use a scale of 0 to 10 where 10 is extremely satisfied and 0 is extremely dissatisfied

TEXT THREE: "How often do you use a BCH bike? Txt 1=5+ days/week, 2=3-4days/wk, 3=2days/wk, 4=once/wk, 5=2-4days/month, 6=less than 1 day/mnth, 7=not in 12 mnths, 8=never."

TEXT FOUR: What one thing would you change about the Barclays Cycle Hire scheme?

TEXT FIVE: Please tell us your gender: Txt '1' if male, '2' if female, '3' if prefer not to say

TEXT SIX: Please tell us your age (if you would prefer not to say - please respond 0)

TEXT SEVEN: Thanks for your help. Survey by SPA Future Thinking. If you want to verify the company call the Market Research Society 0500 396999 number free from landlines

Findings

SMS responses are broadly in line with the results of the main study

Similar demographic and use results are observed

Satisfaction with the BCH scheme is high, although a fifth give ratings of 5 or less out of 10

Age & gender

- 77% of members responding by SMS are male (23% female)
- The most common age groups of members is 25-34 and 35-44:

16-24	5%
25-34	41%
35-44	33%
45-54	14%
55-64	5%
65+	3%

Base: 88

Frequency of use

- The majority, 71% of members report using a BCH at least once a week

5+ days a week	17%
3-4 days a week	31%
2 days a week	13%
Once a week	8%
2-4 days a month	21%
< once a month	7%

Base: 88

Satisfaction

- The most common satisfaction score is 8 out of 10
- 25% rate their satisfaction as 9 or 10
- But, 18% rate their satisfaction as 5 or less



Base: 79

Comments: What should be improved?

'Availability' is the most common area identified for improvement - 62% of members noted this

'Other' comments included:

"Fix the casual user process. It's awful I can never go cycling with visitors. It's unreliable and embarrassing. Luckily I've got a key but without I couldn't use the scheme."

"Use Oyster card as opposed to plastic key. Be able to see journey times without having to print them out. I'd like to find maps in the street where I could see where the docking stations are located"

"Make the gear ratios taller."



SMS summary

Results to the SMS survey mirror those received in the main study

- The typical BCH member is male, 25-44 and uses the scheme frequently – between 3 to 4 days a week
- The majority of BCH members were satisfied with the service - over half scoring 8 or more out of 10
- The availability of cycles and free docking point are the most commonly cited issues for improvement
- While it should be noted that BCH members are generally more likely than most Londoners to reply to survey invitations, the SMS methodology worked well and would be a viable approach for future surveys when appropriate
- The time in field for SMS surveys is relatively short with most surveys being returned within 24hrs