

Santander Cycles Casual Users Profile – Q2 2015/16



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Key findings



Summary

- Overall satisfaction has increased to a peak score of 86. Similarly, recommendation has also reached a record high level (from 91 to 92).
- The demographic profile of casual users has remained very similar over the past few years: the scheme is particularly used by those who are young, white, male and living in London.
- There has been a slight increase in first time users (now over one in five), but a decrease in the proportion of regular casual users (3 or more days a week).
- Awareness of Santander Cycles membership has slightly decreased since last year, although remains at a high level with eight out of ten people aware, whilst awareness of the new self-guided bike rides available online is lower at 22%.
- The key attractions of the scheme are the convenience and ease of use, however, the speed and enjoyment of cycling are the main reasons for using the scheme. On the negative side, the lack of spaces and the heaviness of the bikes are the most commonly mentioned reasons for dissatisfaction with the scheme.

2

Background and objectives



Background and objectives

Research objectives are to:

- Form a better picture of who Santander Cycles casual users are in order to inform service development – What is their profile? Where do they live? Are they travelling alone or with others? Frequency of using Santander Cycles?
- Understand journey purpose, reasons for deciding to hire a bicycle.
- Measure satisfaction with the scheme and likelihood to recommend.

Wave 4 interviewing took place with 87 shifts at Central zone docking stations, 36 in the Eastern zone and 37 in the Western Zone between 6th July and 9th August 2015.

A total of 1051 interviews were completed with casual users bringing their bicycles back to the docking station after making a journey. If the docking station was full, interviewers approached individuals hiring a bicycle, but only if they had previously hired a bike that same day.



Background and objectives

The proportion of respondents about to hire a bike and who had just docked a bike are:

- Respondent just about to **hire** a bike: 24%
- Respondent had just **docked** a bike: 76%

Number of interviews:

	Target	Achieved (unweighted)	Achieved (weighted)
Central Zone	700	670	764
Eastern Zone	200	189	123
Western Zone	200	192	164
Total	1100	1051	1051

Weighting was applied on busy/average/quiet stations within Central, Eastern and Western zones to represent casual bike usage :

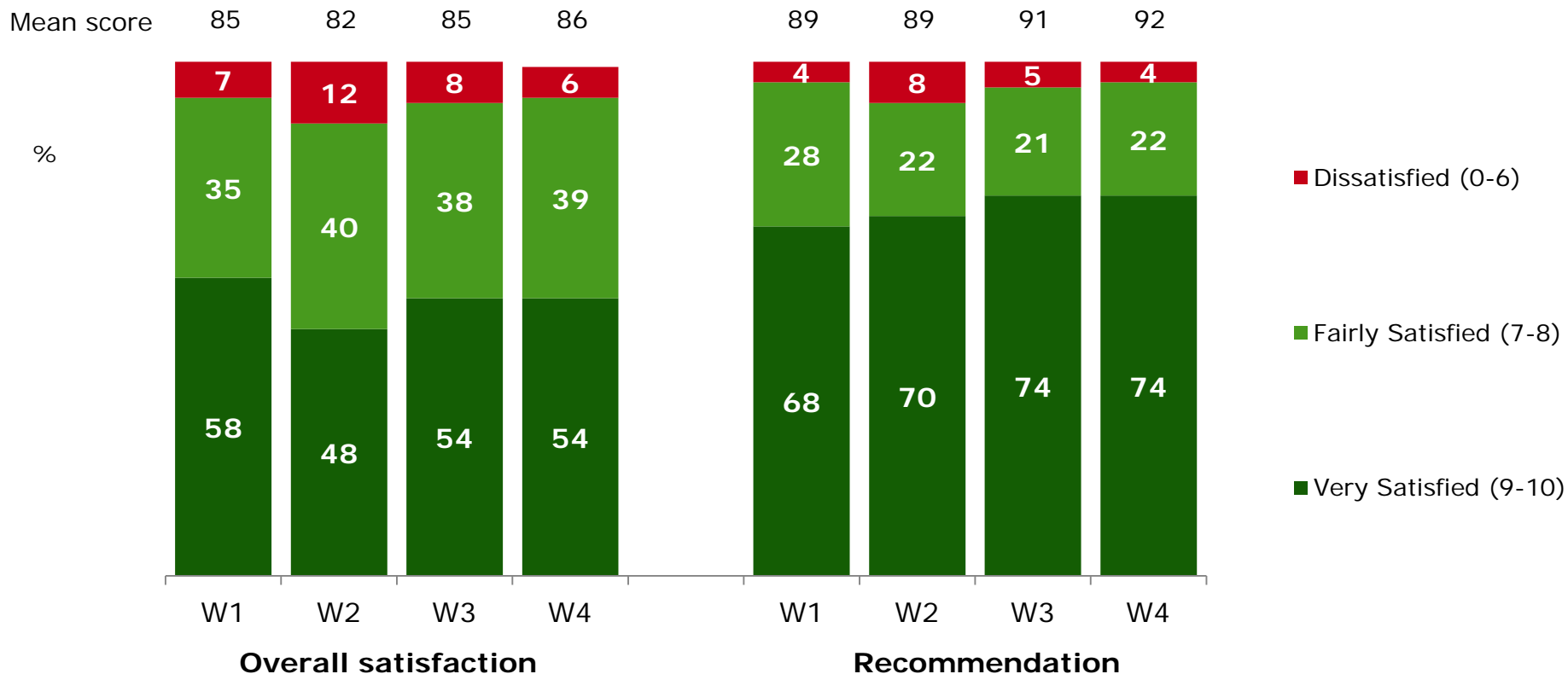
		Weight
Central Zone	Busy (600+ dockings in the month)	54.75%
	Average (300-599 dockings in the month)	14.96%
	Quiet (<300 dockings in the month)	2.98%
Eastern Zone	Busy (600+ dockings in the month)	6.27%
	Average (300-599 dockings in the month)	3.86%
	Quiet (<300 dockings in the month)	1.57%
Western Zone	Busy (600+ dockings in the month)	7.19%
	Average (300-599 dockings in the month)	6.54%
	Quiet (<300 dockings in the month)	1.87%
TOTAL		100%

3

Satisfaction with Santander Cycles/ likes and dislikes



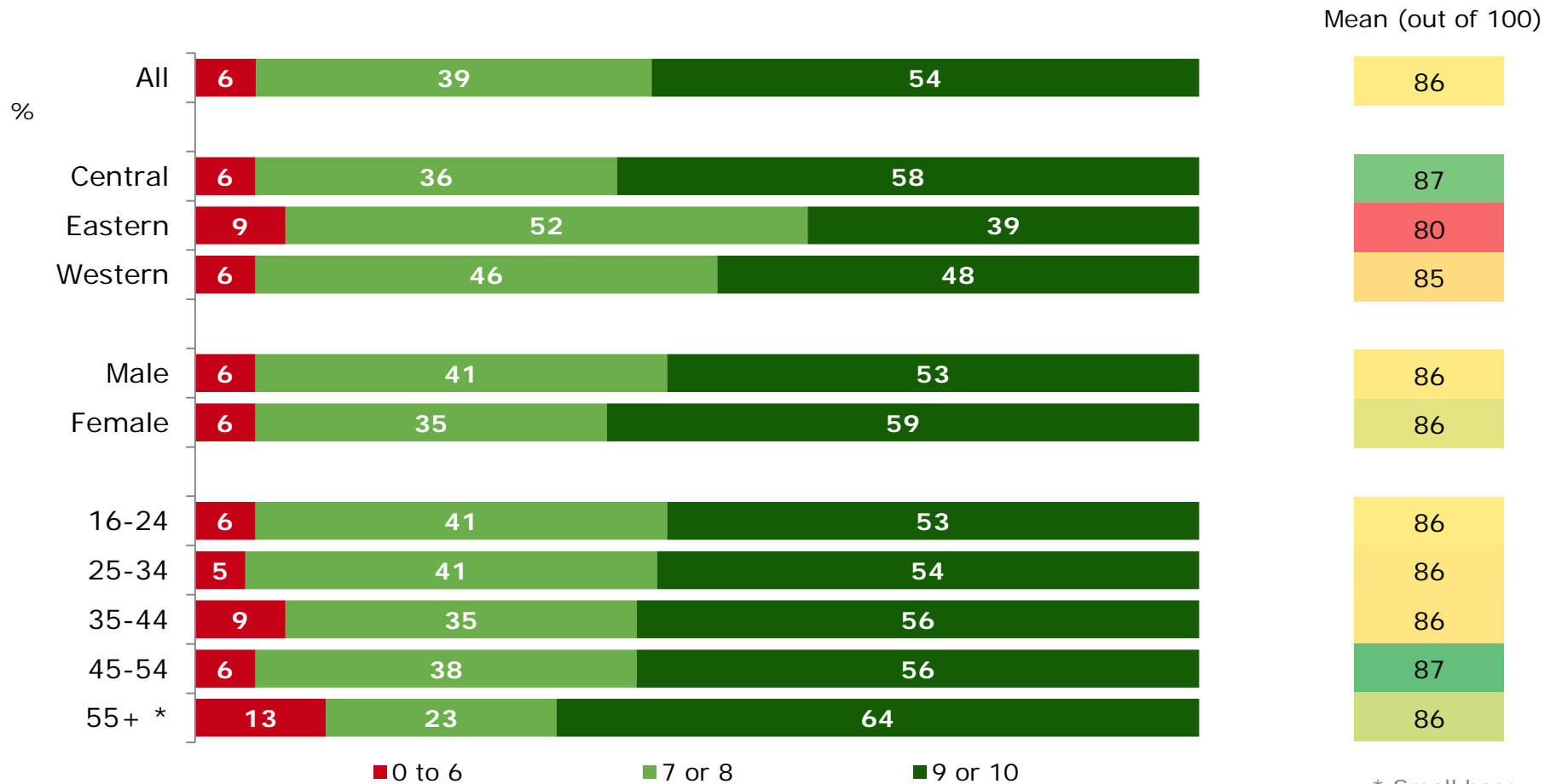
Casual users are more satisfied with their overall experience (86) and more likely to recommend (92) than ever before.



Q12. How satisfied are you with your overall experience of Santander Cycles today? / Q13. How likely would you be to recommend Santander Cycles to friends or family? Base: All casual users W1: 1111; W2: 1109; W3: 1179; W4: 1051



Satisfaction with Santander Cycles is highest in the Central zone, where nearly six out of ten users gave a score of nine or ten, and lowest in the Eastern zone (only four out of ten).



* Small base

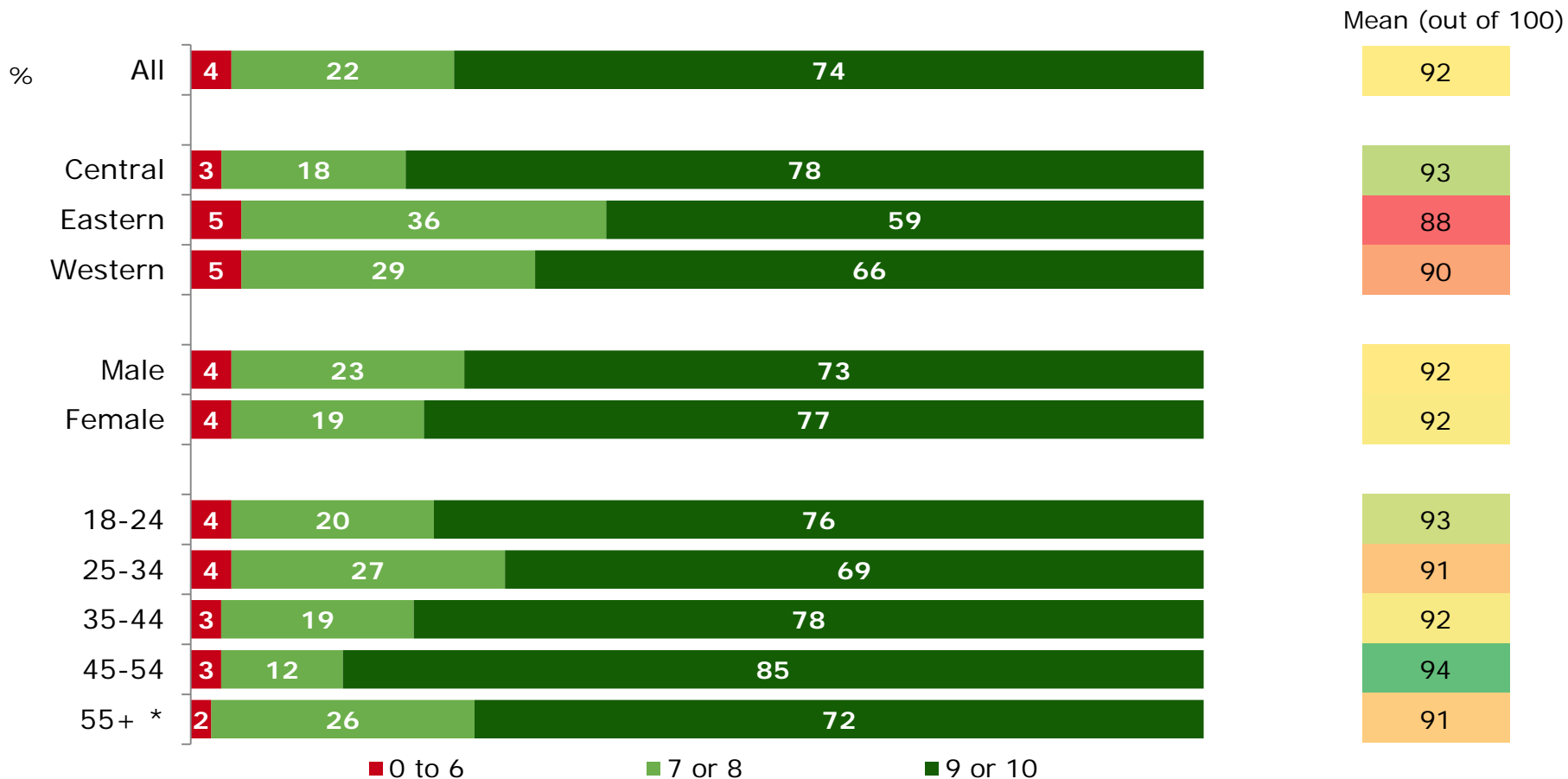
Q12. Taking everything into account, how satisfied are you with your overall experience of Santander Cycles today?

Base: Casual users W4: All:1051; Central: 670; Eastern: 189; Western: 192; Male: 750; Female: 301; 16-24: 348; 25-34: 438; 35-44: 139; 45-54: 100; 55+: 26

©TNS



Casual zone users are most likely to recommend Santander Cycles, with users in the Eastern zone least likely to recommend.



* Small base

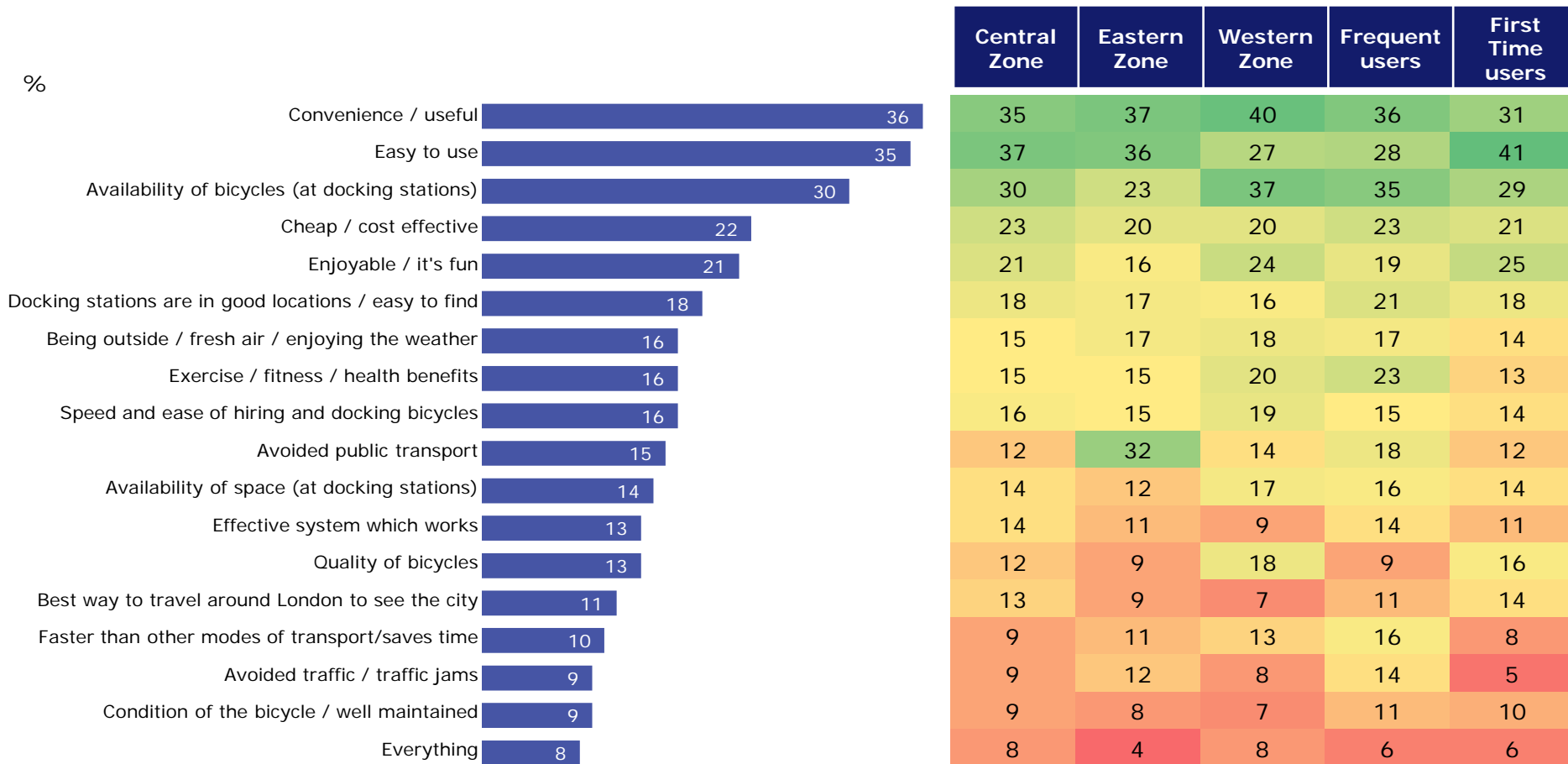
Q13. How likely would you be to recommend Santander Cycles to friends or family?

Base: Casual users W4: All:1051; Central: 670; Eastern: 189; Western: 192; Male: 750; Female: 301; 16-24: 348; 25-34: 438; 35-44: 139; 45-54: 100; 55+: 26

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The main attractions of Santander Cycles are ease of use and convenience. The ease of use is particularly important among first time users with four in ten citing this.



Q14. Thinking about your experience of using Santander Cycles, what was particularly good about your experience?

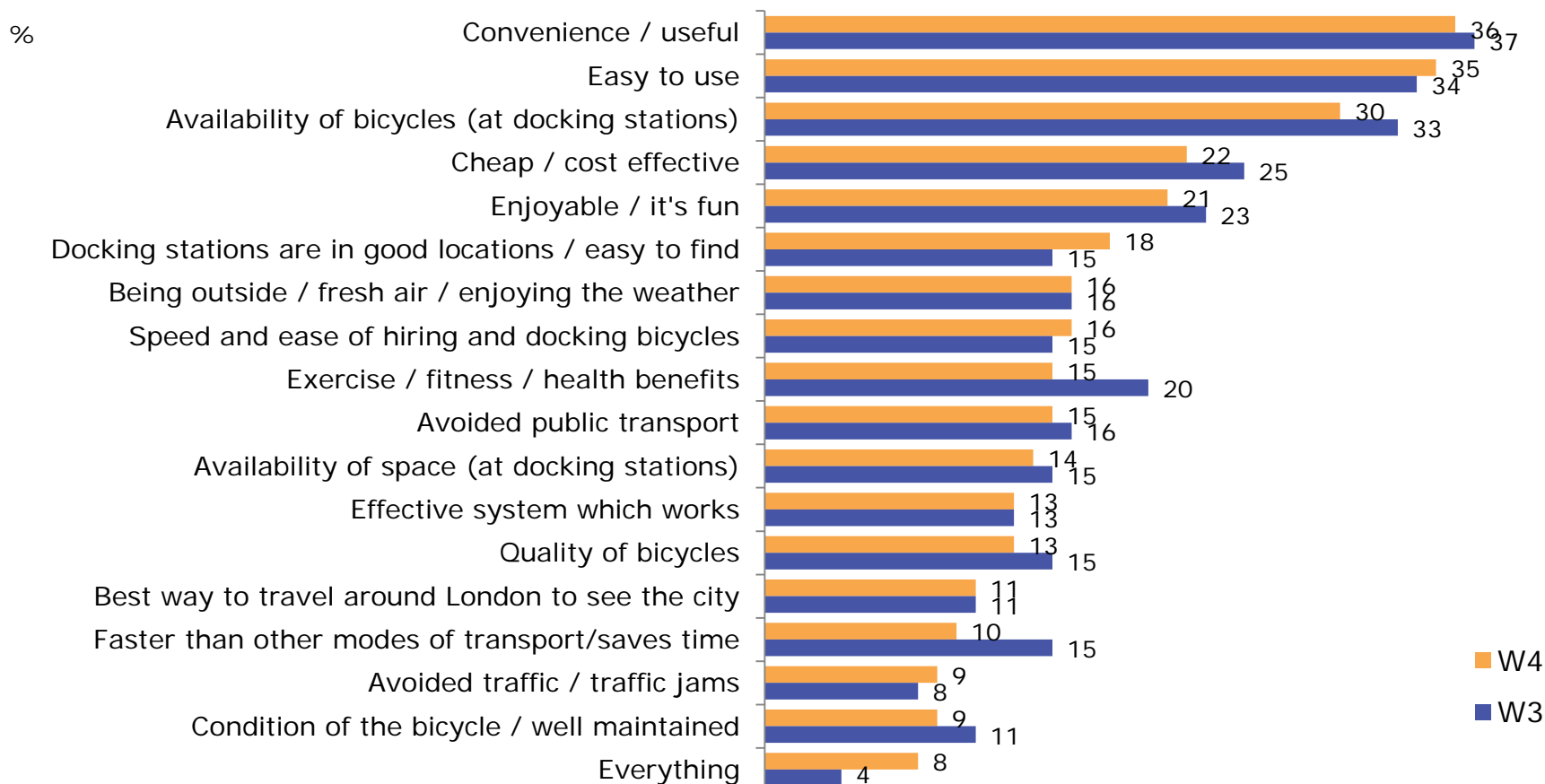
Base: Casual users W4: All 1051, Central: 670; Eastern: 189; Western: 192; Frequent users (3-5 days a week): 247; First time users: 230

©TNS

Mentions above 5% in W4 are shown



Compared to the previous wave, most aspects have remained stable, with convenience and ease of use remaining the most cited reasons for a positive experience.



Q14. Thinking about your experience of using Santander Cycles, what was particularly good about your experience?

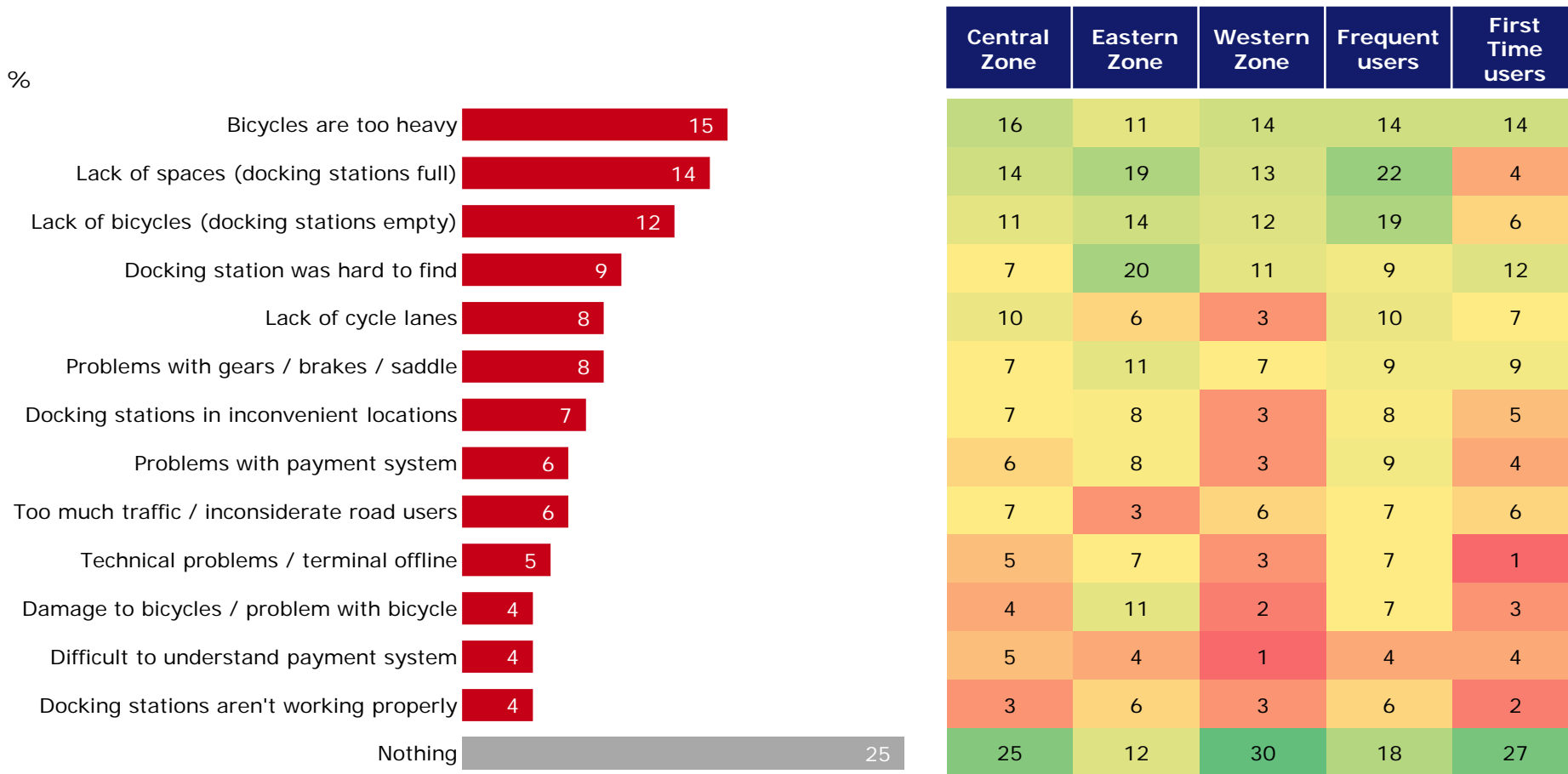
Base: All casual users: W3 1179; W4 1051

Mentions above 4% in W3 are shown

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Users in the Eastern zone generally have more concerns (only 12% had none). The main concerns overall were the heaviness of the bicycles and the ongoing issues of lack of bicycles and spaces at docking stations.



Q15. Thinking about your experience of using Santander Cycles, what was particularly bad about your experience?

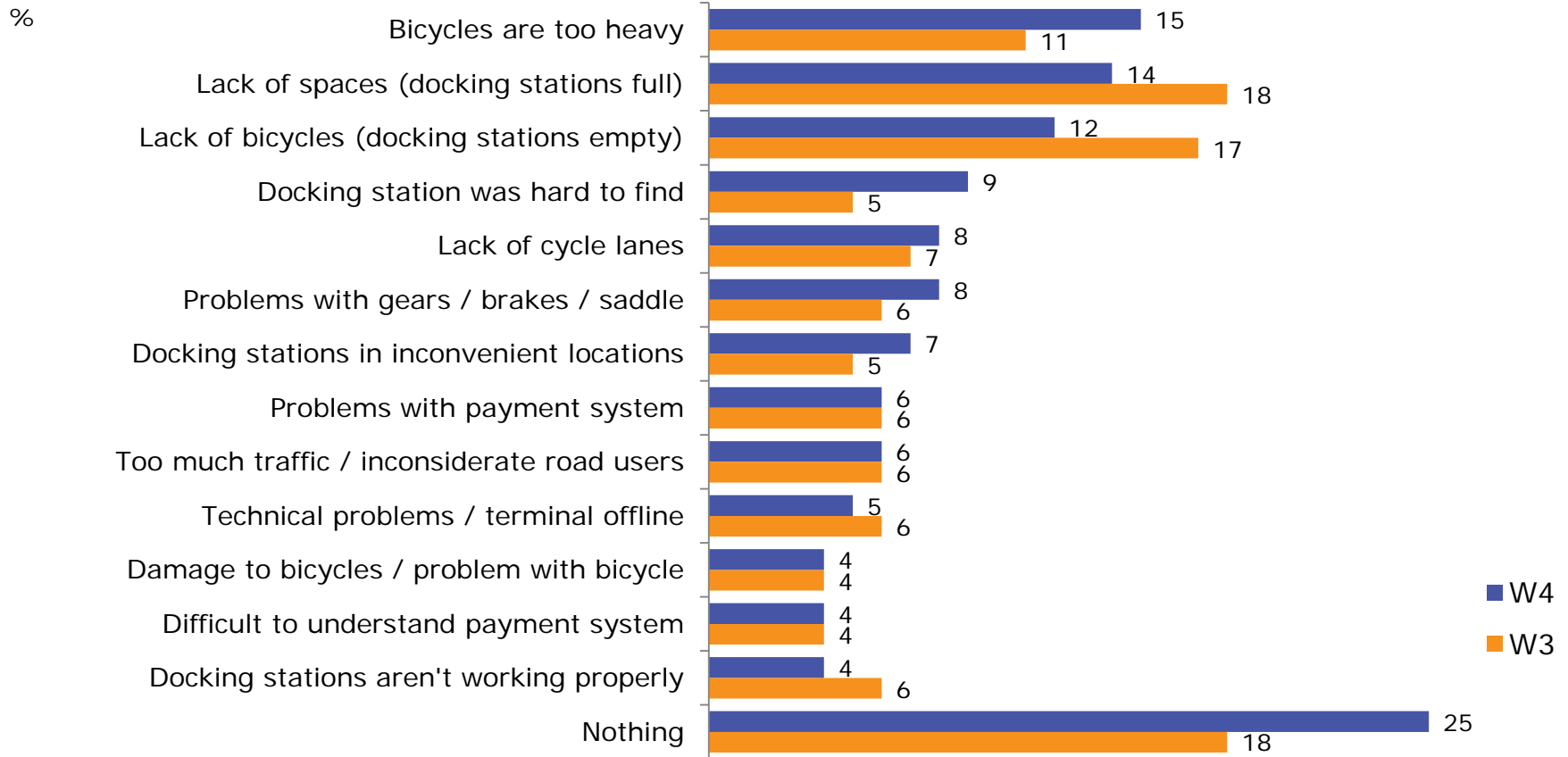
Base: Casual users W4: All 1051, Central: 670; Eastern: 189; Western: 192; Frequent users (3-5 days a week): 247; First time users: 230

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Mentions above 4% in W3 are shown



Over a quarter said there was nothing bad about the experience, an increase on the previous wave. This is driven by improvements in the availability of spaces and bicycles, although the heaviness of the bicycles has become a more prominent issue.



Q15. Thinking about your experience of using Santander Cycles, what was particularly bad about your experience?

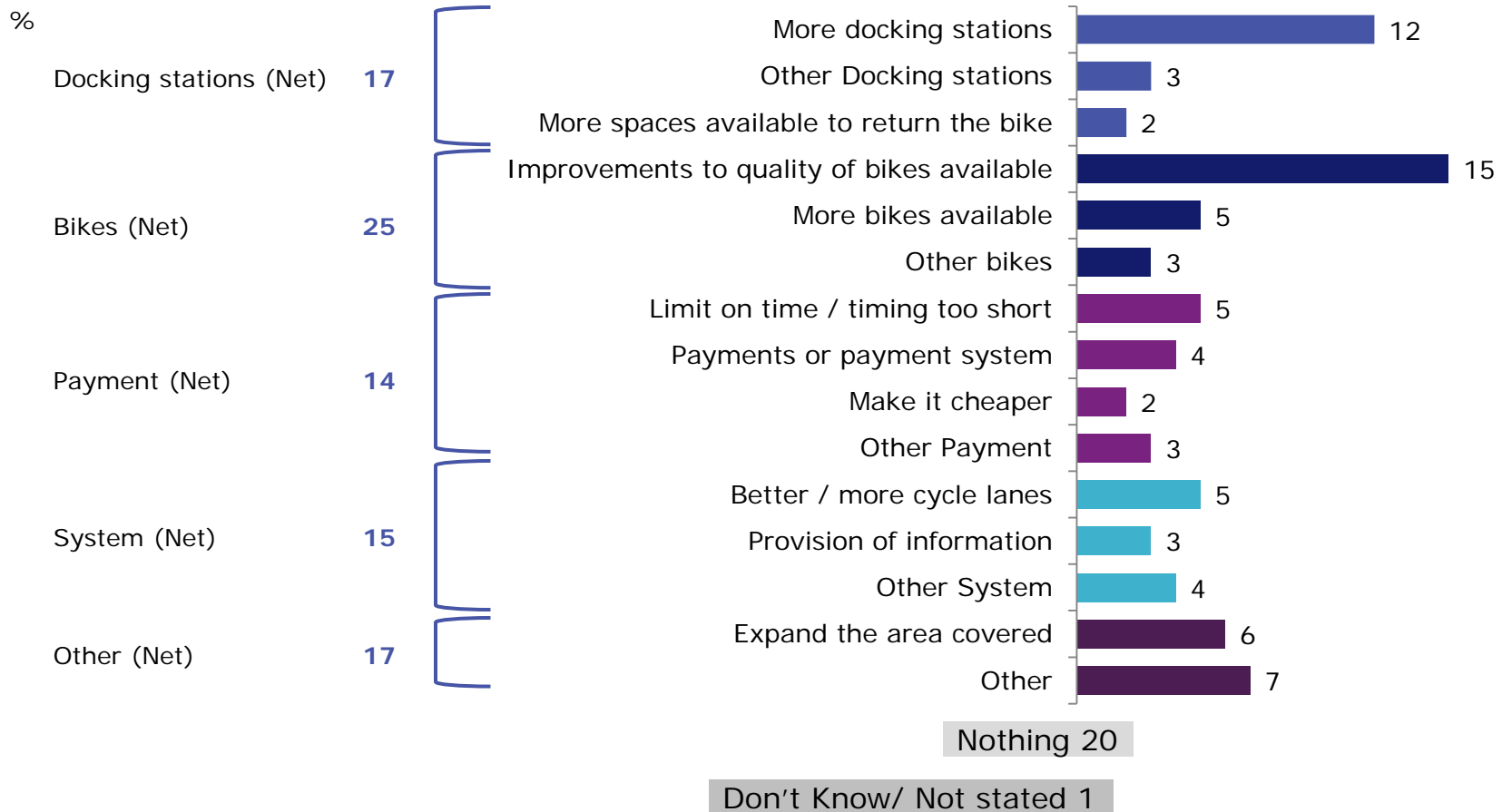
Base: All casual users; W3 1179; W4: 1051

Mentions above 4% in W4 are shown

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The quality of the bikes are the main area that users would seek to improve. Increasing the number of docking stations is another popular improvement.

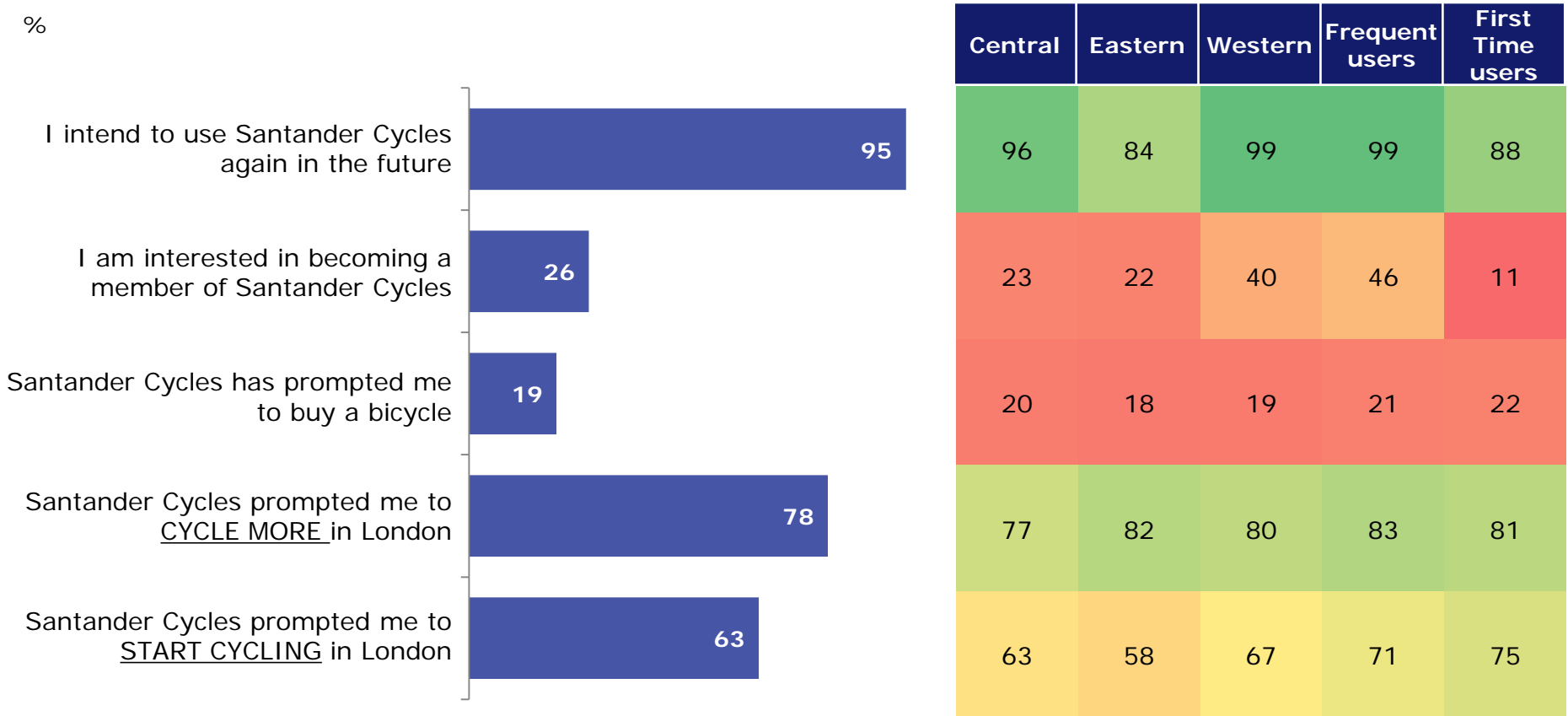


Q16.If there was one thing you would improve about the Santander Cycles scheme, what would it be?

Base: Casual users W4: All 1051



Almost all casual users intend to use Santander Cycles again, with over three quarters encouraged to cycle more in London as a result of the scheme. Whilst first time users are least likely to be interested in becoming members of the scheme, nearly three quarters claim that the scheme encouraged them to start cycling in London.



Q19. Which, if any, have you done as a result of the introduction of the Santander Cycles scheme?

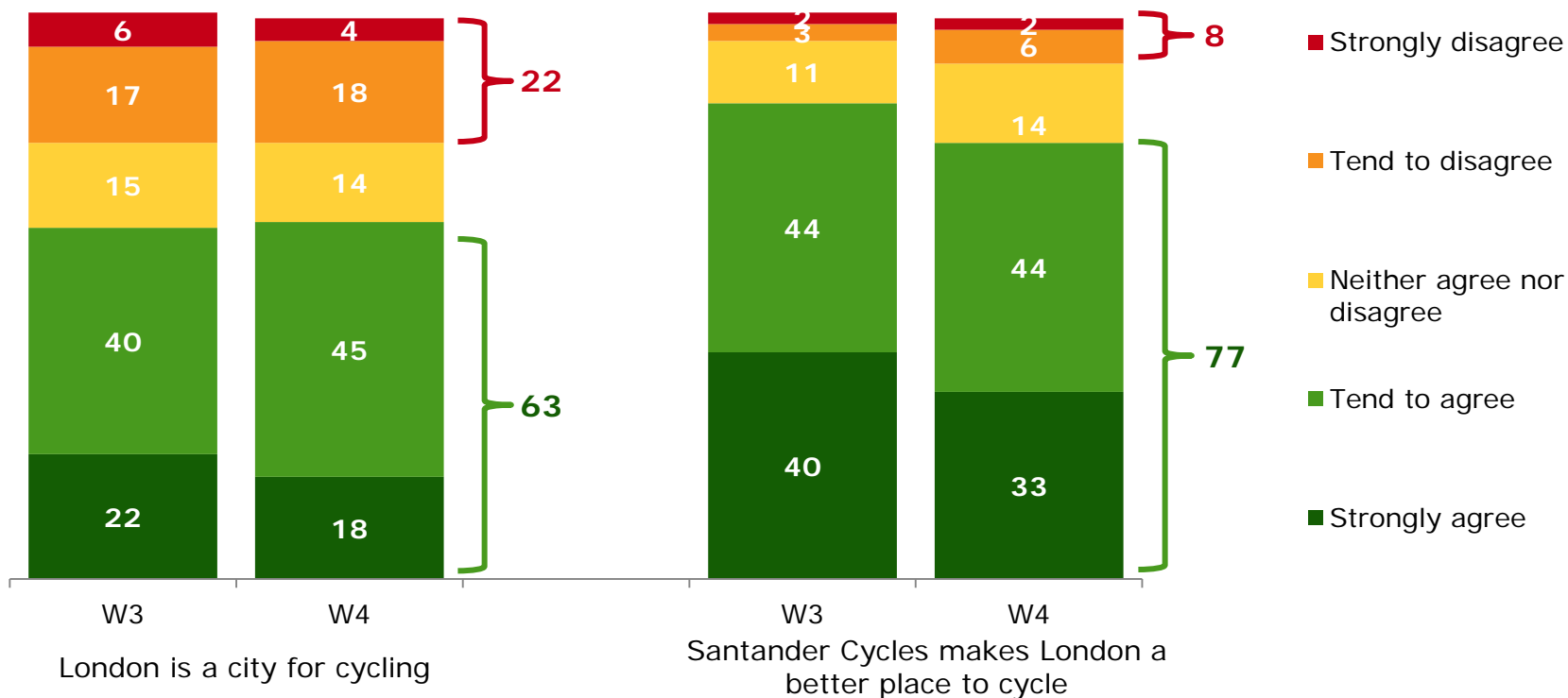
Base: Casual users W4: All 1051, Central: 670; Eastern: 189; Western: 192; Frequent users (3-5 days a week): 247; First time users: 230

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Nearly two thirds of casual users think London is a city for cycling, whilst more than three quarters agree that Santander Cycles makes London a better place for cycling.

%

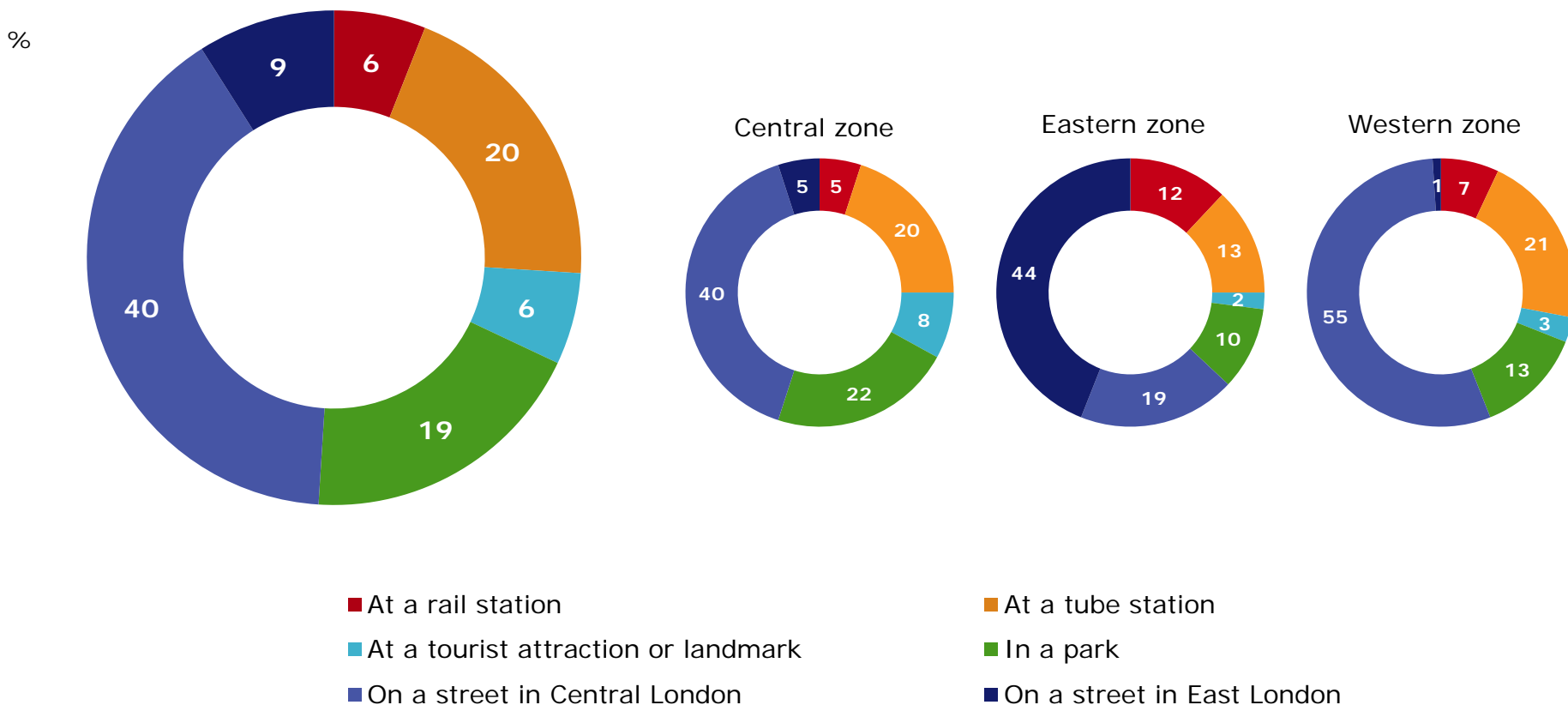


Q20.To what extent do you agree with the following statements?

Base: Casual users W3: All 1179; W4: All 1051



Four in ten docking stations used by respondents were located on a Central London street.



Q3c. Thinking of the docking station you used to hire the bike for your most recent trip, was it located ...?

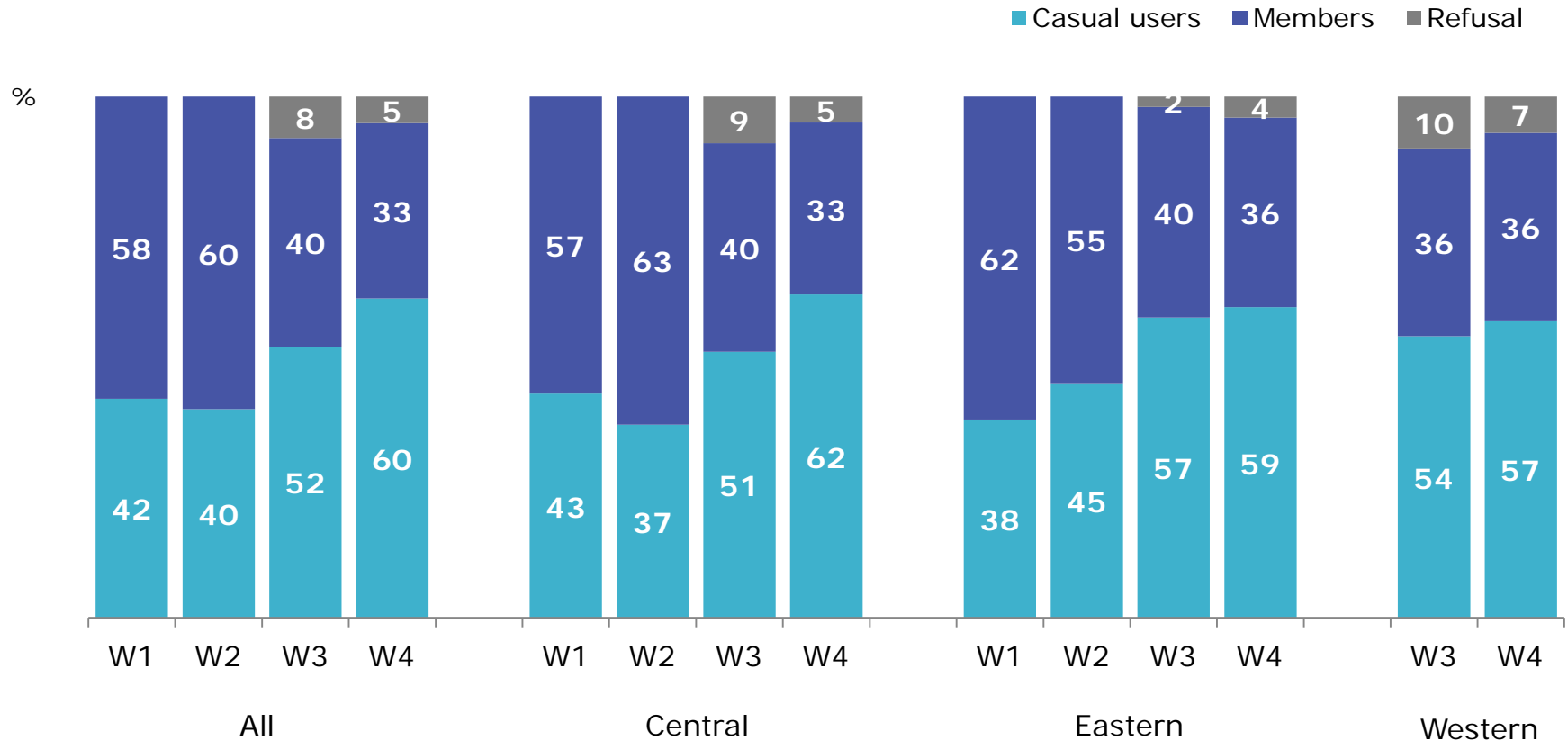
Base: Casual users W4: All 1051, Central: 670; Eastern: 189; Western: 192

4

Profile of casual users, and comparison with member profile



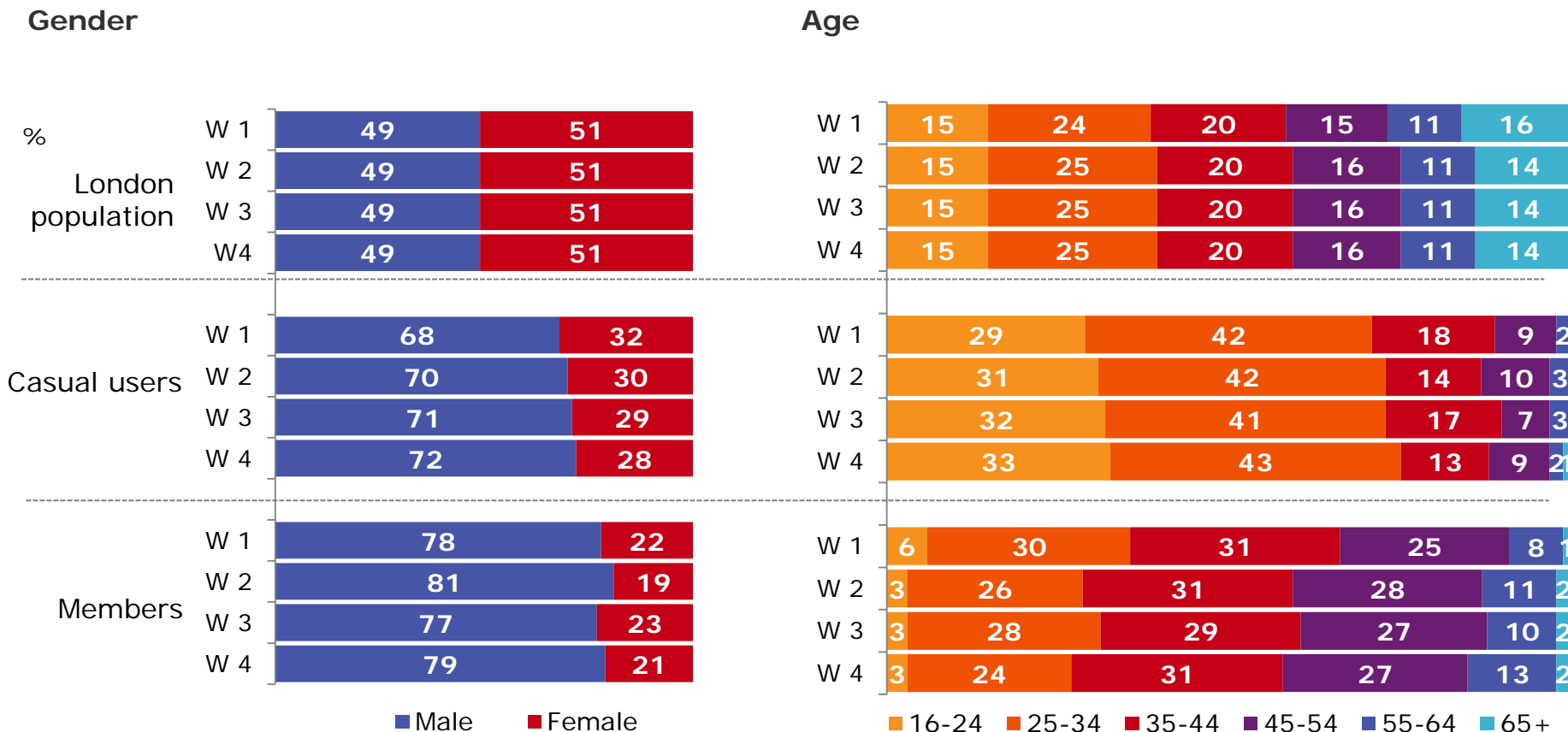
During the fieldwork at docking stations, interviewers recorded the number of Santander Cycles members and casual users they approached. Casual users accounted for 60% of all those approached in wave 4.



Base: in W1, the counts were based on about half the fieldwork, in W2 counts were based on all fieldwork recorded manually on paper by interviewers. In W3 counts were including the the survey script.
W4: 2239



There are higher proportions of males among both Santander Cycles members and casual users compared to the London population. Around a third of casual users are aged 16-24, compared to 15% of the population and only 3% of members.



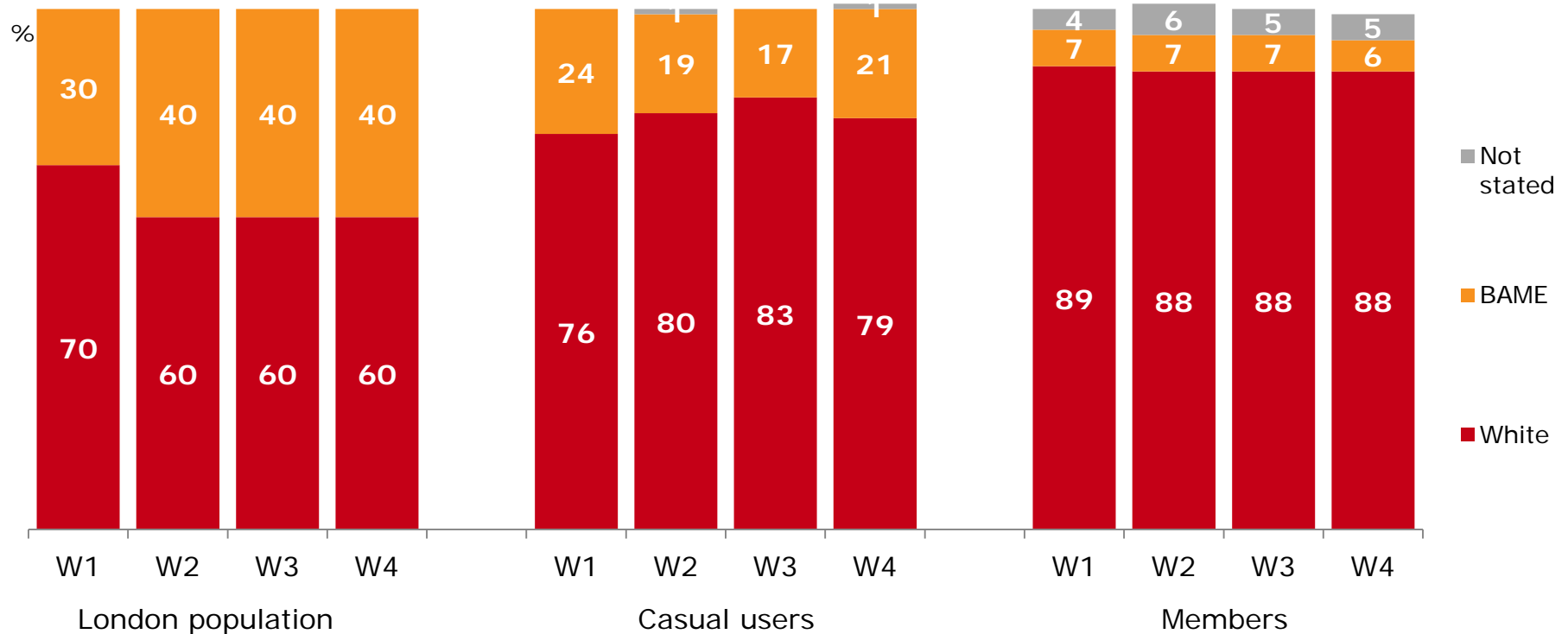
Q30. Interview: code respondent's gender / QK1 Gender. Are you...?

Q3. And which of these age categories do you fall into? / S2. How old are you?

Base: Casual users W1: 1111; W2 1109; W3 1179; W4: 1051; members W1: 4789; W2: 371; W3: 2998; W4: 2935; London population Source 2011 census.



In comparison to the general London population, BAME people continue to be under-represented, especially among Santander Cycles members.

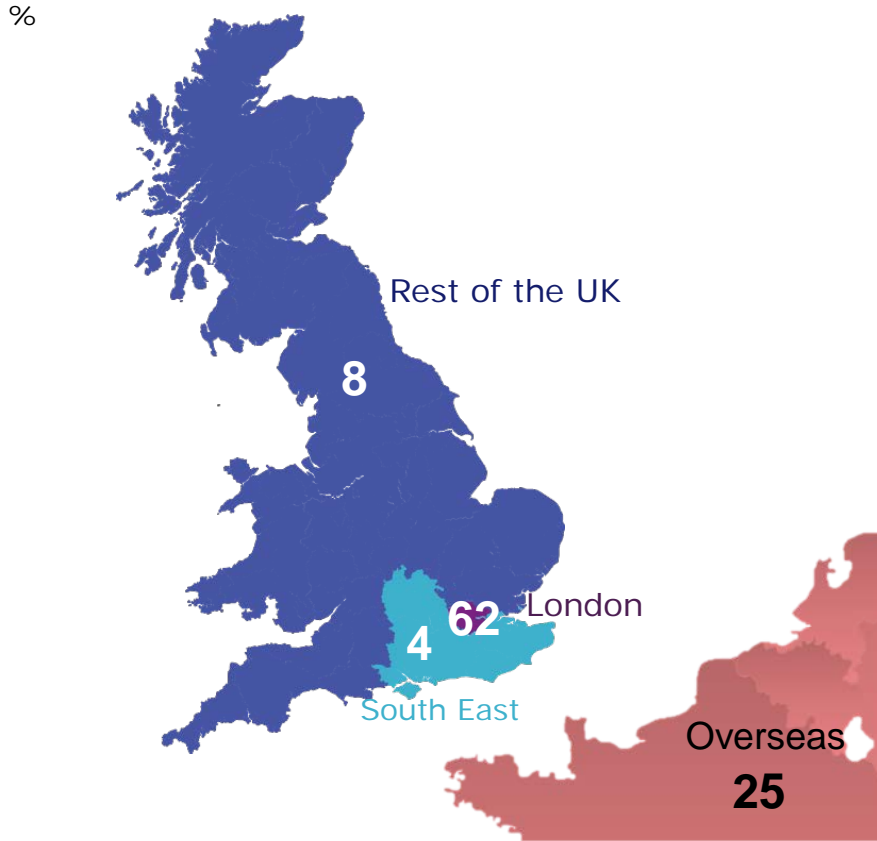


Q25.How would you describe your ethnicity? / Q8d And are you...?

Base: Casual users W1: 1111; W2 1109; W3 1179; W4 1051; members W1: 4789; W2: 3717; W3: 2998; W3: 2935; London population W2 Source 2011 census.



Around six in ten casual users are London residents, but a quarter live overseas. Of the overseas users, those from Australia are most common, followed to a lesser extent, by USA and France.



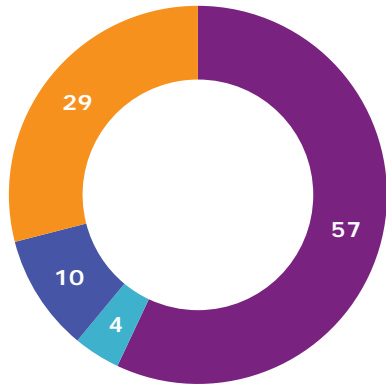
Country*	%
Australia	17
USA	13
France	10
Spain	5
Germany	4
Brazil	4
Italy	4
China	3
Other	40

* All quoted by more than 3% of overseas respondents

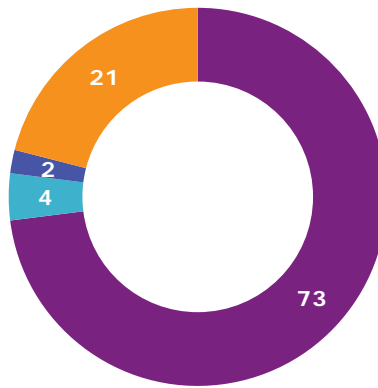
Q4. Where do you live? Q34 Which country do you normally live in?
 Base W4: Casual users: All 1051; Overseas resident: 250

The Central zone has the highest proportion of overseas visitors (29%). The proportions of overseas visitors in the Eastern and Western zones have increased since the previous wave.

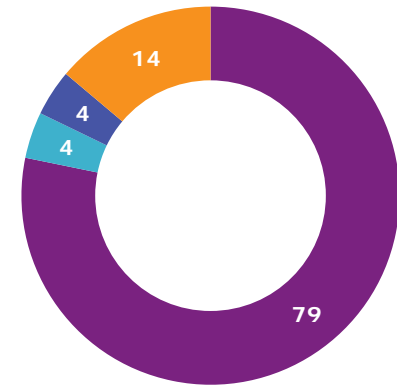
Central zone



Eastern zone



Western zone



Central

Eastern

Western

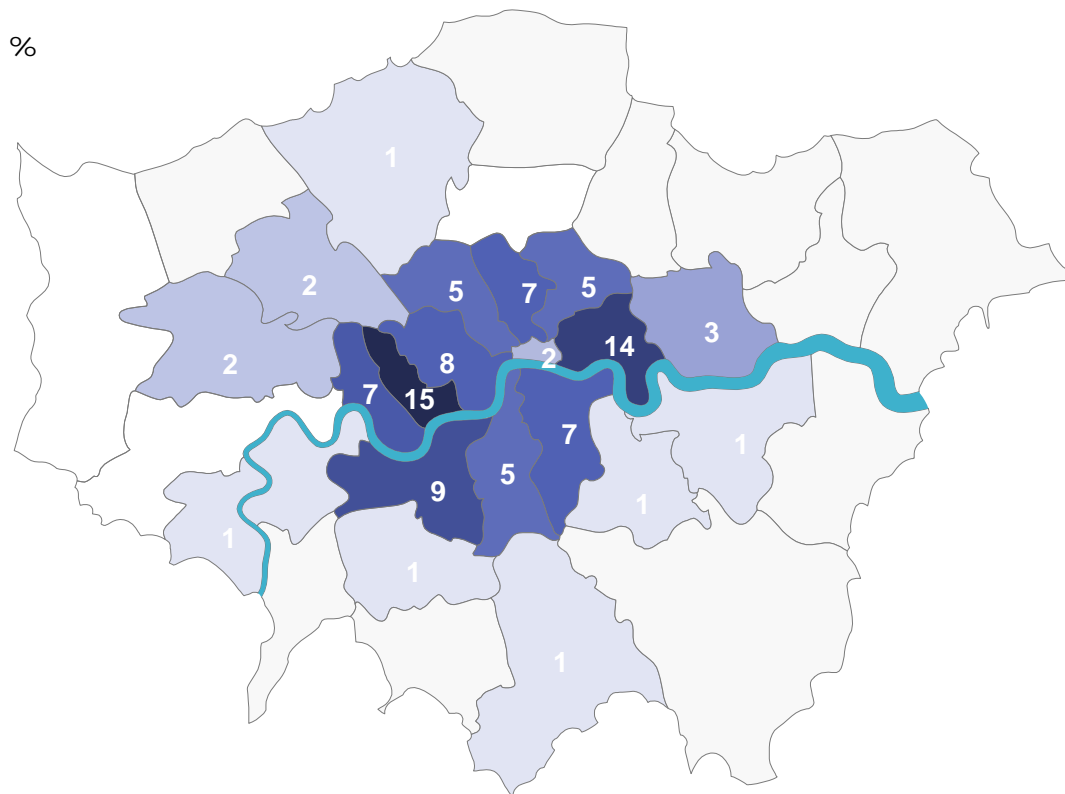
- London, including Greater London
- South East England but not London
- Elsewhere in the UK
- Overseas



Q4. Where do you live?

Base: Casual users W4: All 1051; Central: 670; Eastern: 189; Western: 192

Whilst casual users living in London mainly reside centrally, there has been an increase in the proportion of users living in Western boroughs such as Kensington & Chelsea, Hammersmith & Fulham and Wandsworth since wave 1, a result of the Western expansion.



Less than 1%

Borough	% residents W1	% residents W2	% residents W3	% residents W4
Kensington and Chelsea	6	9	13	15
Tower Hamlets	19	18	16	14
Wandsworth	2	3	8	9
City of Westminster	14	12	11	8
Hammersmith and Fulham	1	4	8	7
Islington	3	6	7	7
Southwark	10	9	5	7
Hackney	7	7	8	5
Lambeth	6	7	7	5
Camden	7	6	4	5
Newham	1	2	1	3
City of London	3	3	2	2
Ealing	1	1	1	2
Brent	2	1	1	2
Barnet	1	1	1	1
Greenwich	2	1	1	1
Lewisham	2	1	1	1
Croydon	1	1	0	1
Merton	0	1	0	1
Richmond-upon-Thames	1	1	0	1
Haringey	2	2	0	0
Hounslow	0	1	0	0

Q4. Where do you live?

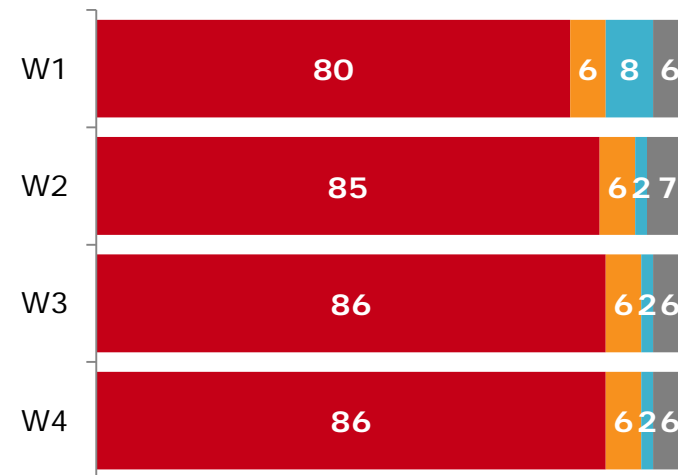
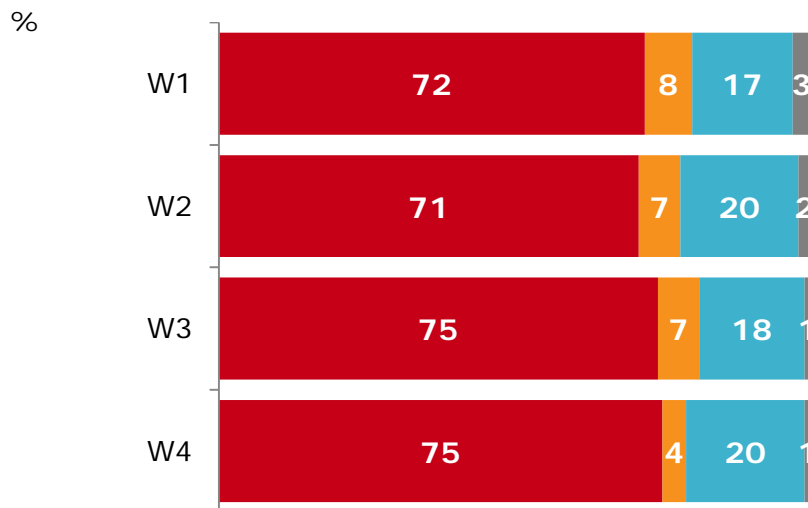
Base: Casual users living in London: W1: 728; W2: 694; W3: 794; W4: 678



Reflecting their age profiles, Santander Cycles members are more likely to work full time than casual users. One in five casual users is a student, compared to just one in fifty members.

Casual users

Members



■ Full time ■ Part time ■ Student ■ Other

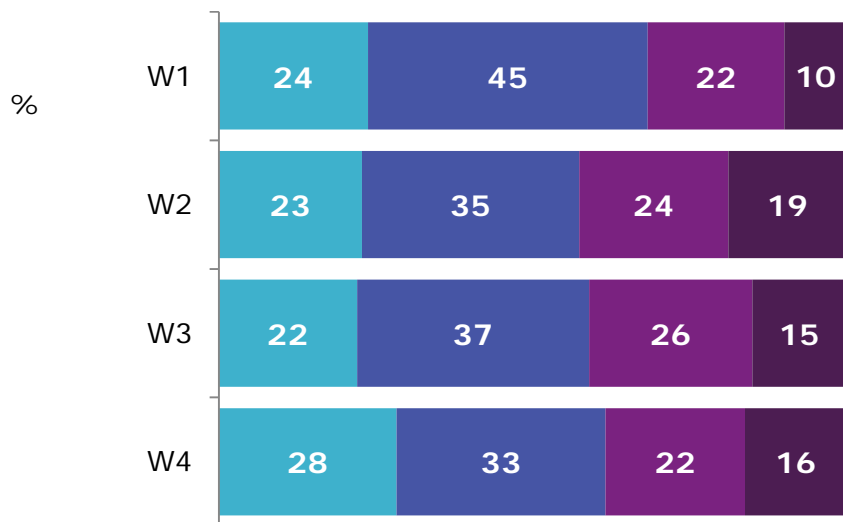
Q27. Are you...? / QK4. Are you?

Base: Casual users W1: 1111; W2 1109; W3 1179; W4 1051; members W1: 4789; W2: 3717; W3: 2998; W4: 2935

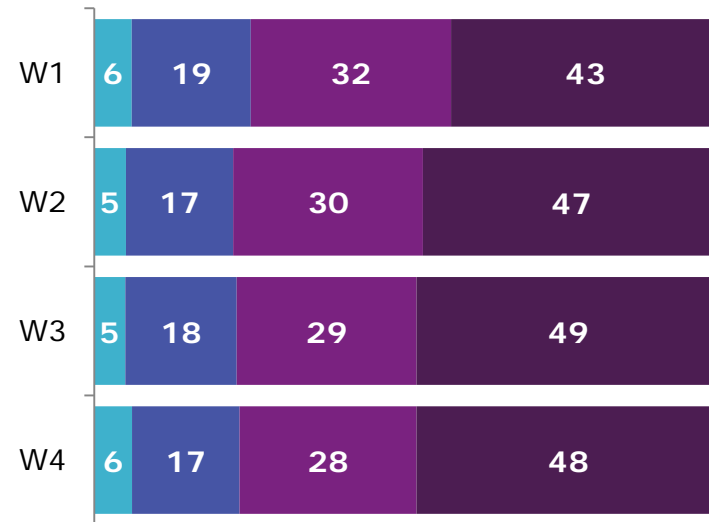


Reflecting their age profiles, casual users generally have lower incomes than members; over a quarter have a household income of less than £20k, compared to just 6% of members.

Casual users



Members



■ <£20k ■ £20-£40k ■ £40-£75k ■ £75k+



Q28.What is your total gross annual household income? / QK5. Please indicate your approximate annual household income, before tax and other deductions.

Base: All who provided an answer: Casual users W1:645; W2 759; W3:947; W4: 766; members W1:2164; W2: 2907; W3: 2410; W4: 2339

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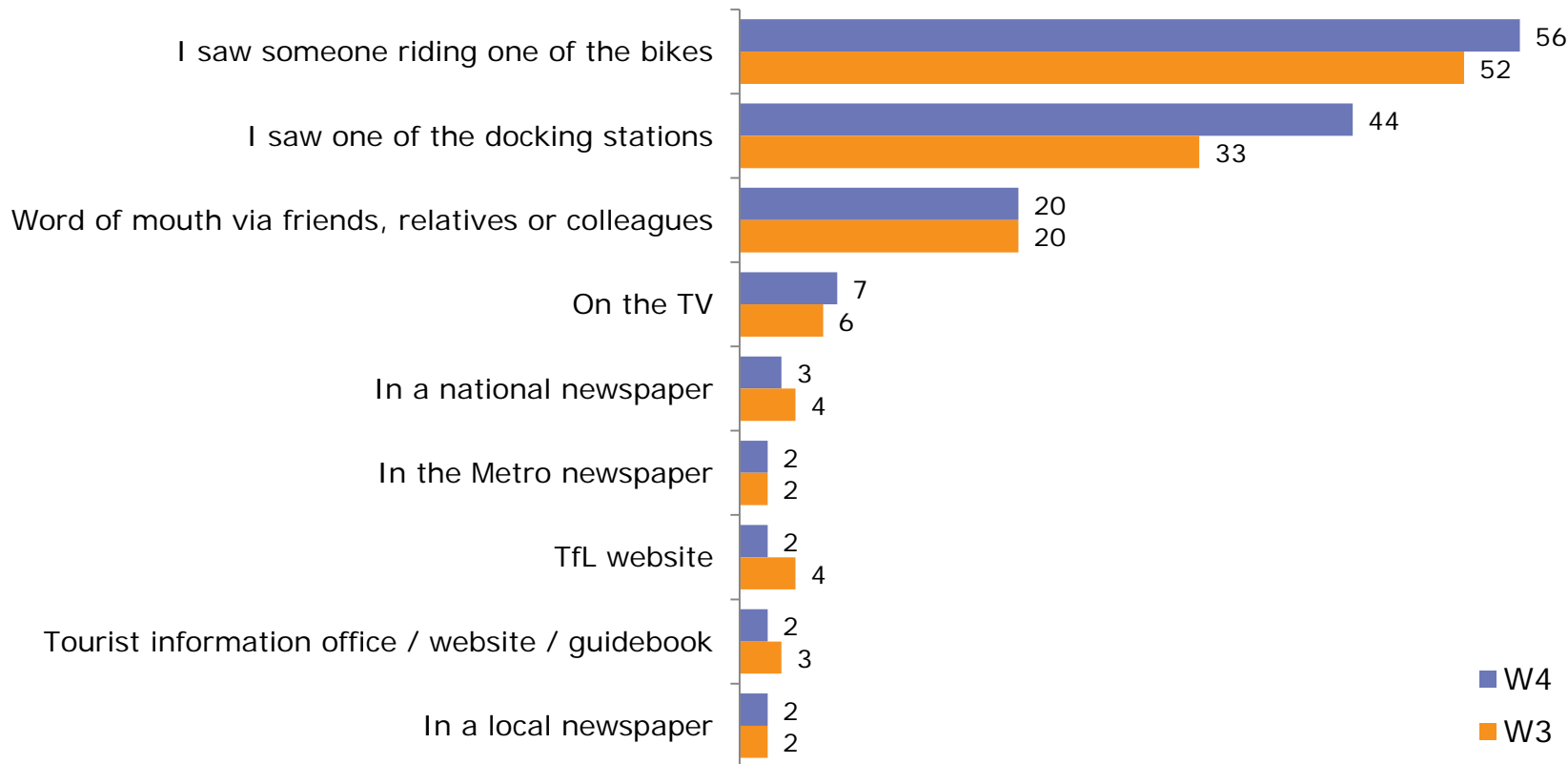


5

How casual users use Santander Cycles

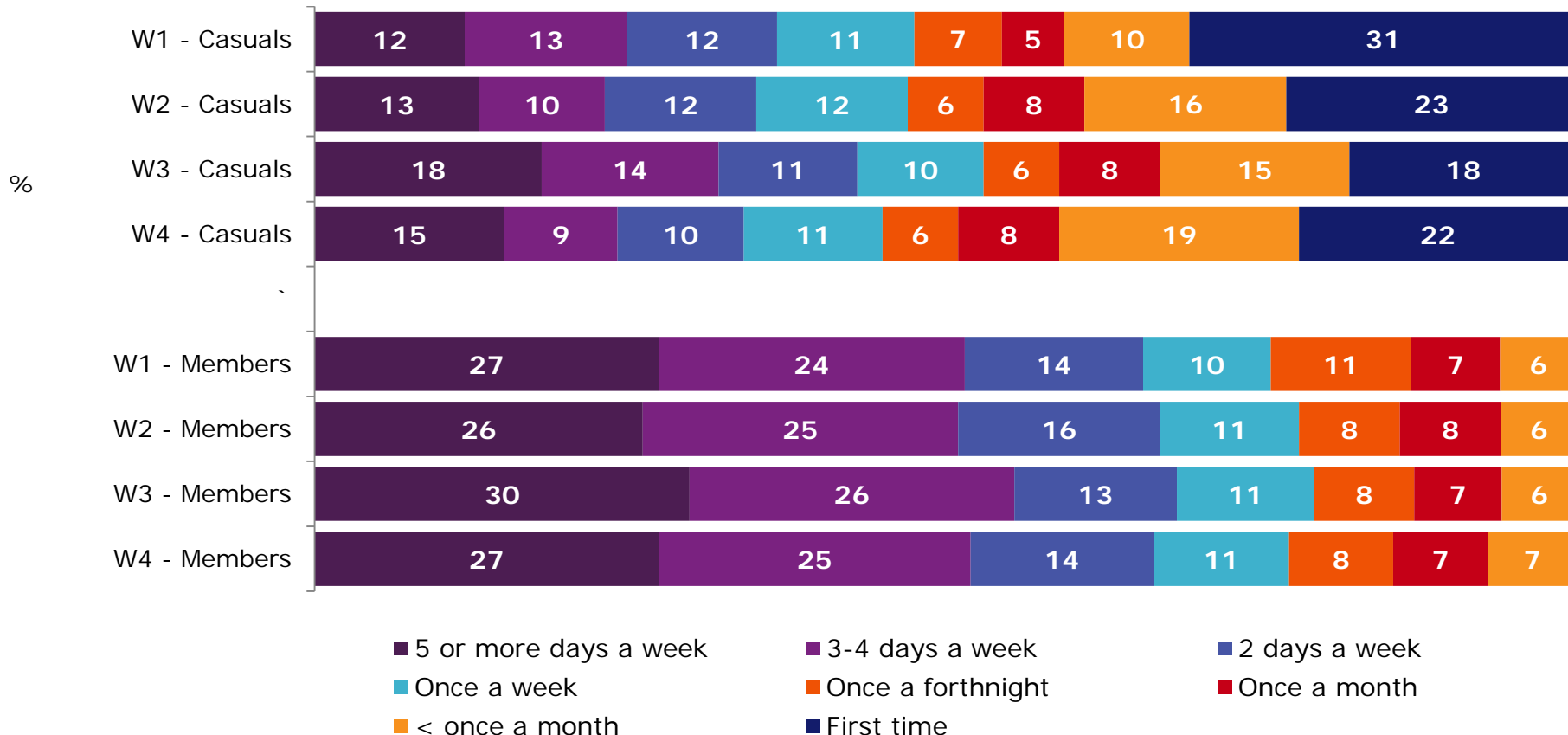


Since wave 3, there has been an increase in the proportion of casual users who found out about the scheme by seeing one of the docking stations (up from 33% to 44%), in line with the ongoing expansion of the Santander Cycles scheme.



Q22.How did you first hear about the Santander Cycles scheme?
Base: Casual users W3: 1179; W4: All 1051

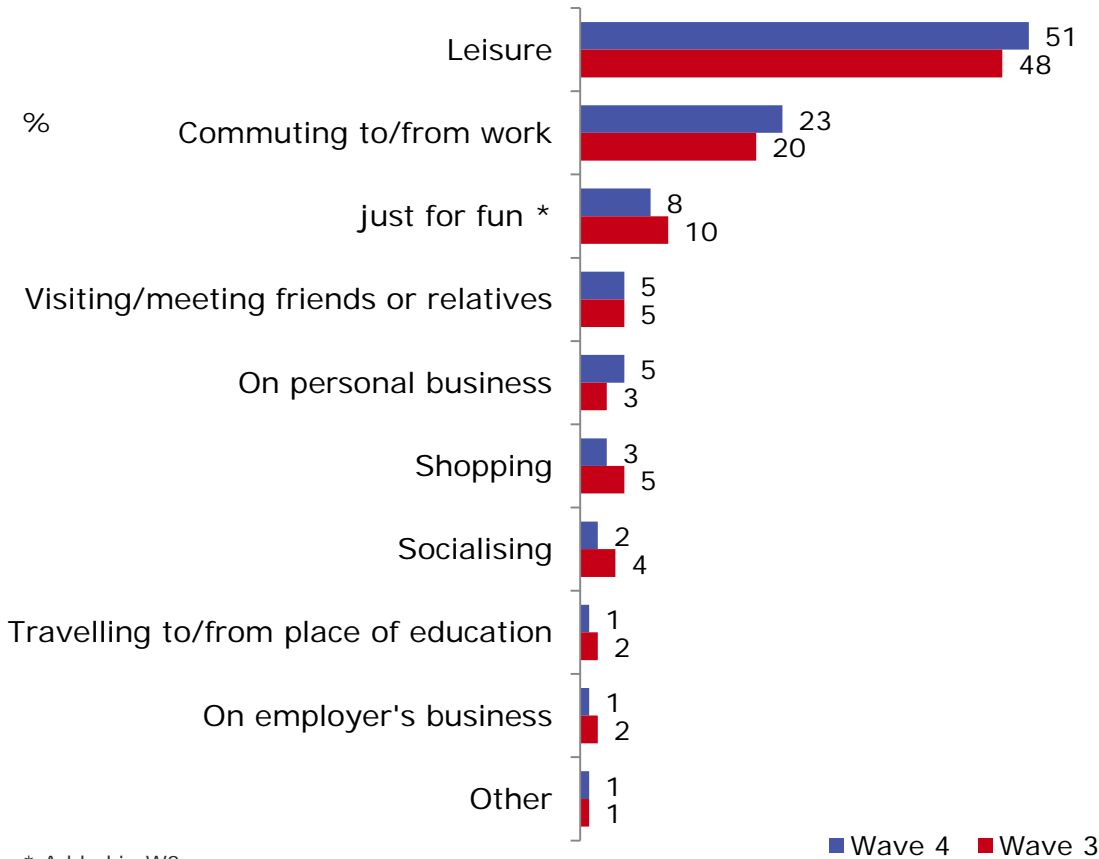
The proportion of first time casual users has increased this wave (now more than one in five) and is comparable to 2 years previously. Conversely, the proportion of regular users (3+ days per week) has declined.



Q23.How often do you use Santander Cycles to get around London? / QJ2a.How frequently do you make each of the following type of trips using Santander Cycles? Base: All casual users W1: 1111; W2 1109; W3 1179; W4: 1051; members W1: 4789; W2: 3717; W3: 2998; W4: 2801 ©TNS



Leisure remains the main reason for using Santander Cycles with around half using for this purpose. The scheme is also used for commuting, particularly in the Eastern zone.



	Central	Eastern	Western
Leisure	51	40	58
Commuting to/from work	22	36	19
just for fun *	9	5	5
Visiting/meeting friends or relatives	5	6	6
On personal business	5	3	5
Shopping	3	4	3
Socialising	1	1	4
Travelling to/from place of education	2	2	0
On employer's business	1	1	1
Other	1	1	0

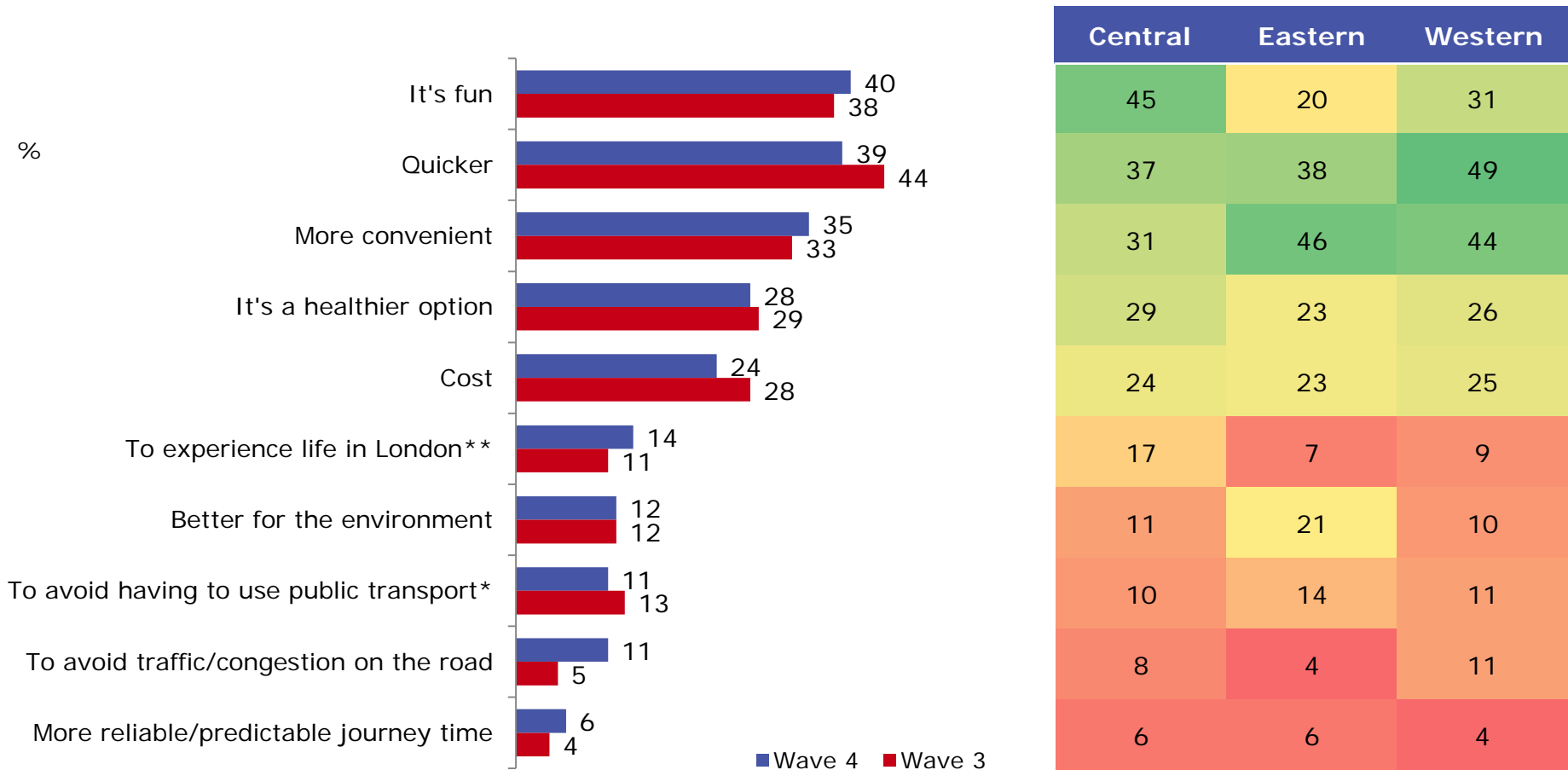
* Added in W3

Q9. What is the main purpose of the current trip that you are making today using Santander Cycles?

Base: Casual users W3: All 1179 / W4: All 1051; Central: 670; Eastern: 189; Western: 192



Fun and speed are the key reasons for using the scheme. Fun is particularly important in the Central zone, whilst speed is cited more as a factor in the Western zone.

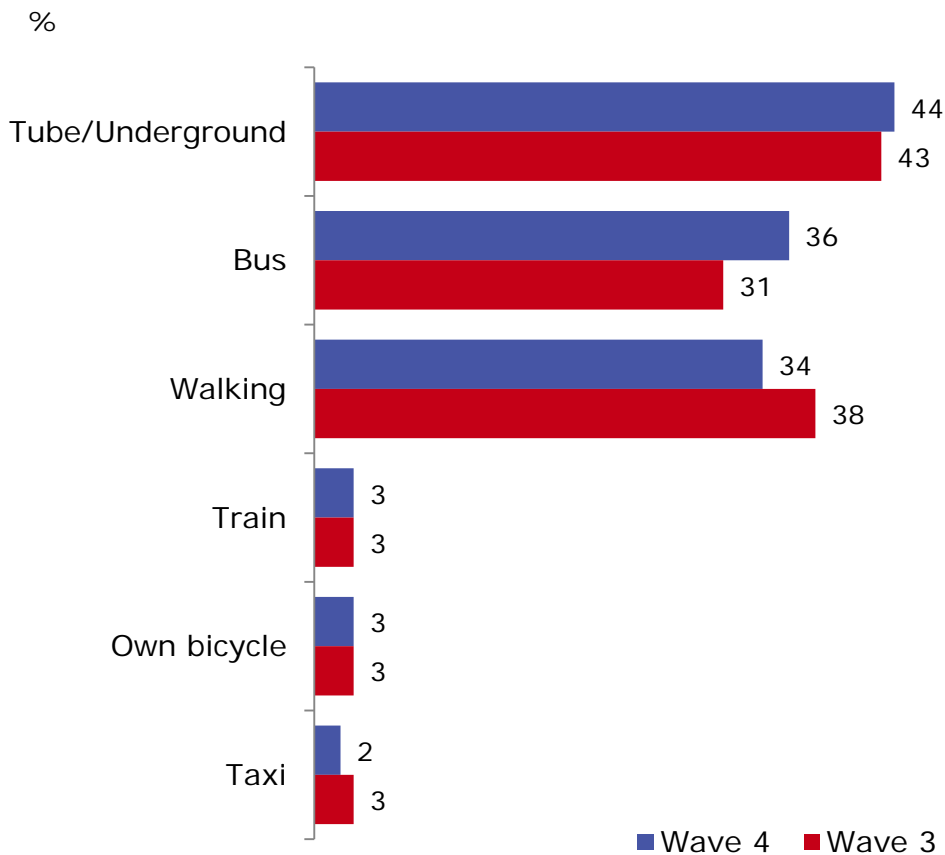


Q10. Why did you choose to make this trip using Santander Cycles?

Base: Casual users W3: All 1179 / W4: All 1051; Central: 670; Eastern: 189; Western: 192



If Santander Cycles had not been used to make the journey, London Underground, walking or bus would have been used instead.



	Central	Eastern	Western
Tube/Underground	43	44	44
Bus	35	45	36
Walking	36	30	28
Train	3	7	1
Own bicycle	3	4	5
Taxi	3	2	1

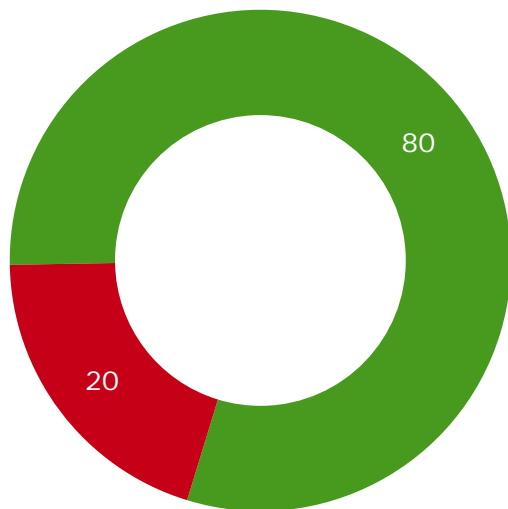
Q11. If you hadn't used Santander Cycles to make the journey, how would you have made it otherwise?

Base: Casual users W3: All 1179 / W4: All 1051; Central: 664; Eastern: 186; Western: 190

Eight in ten UK residents who use the scheme at least fortnightly are aware of Santander Cycles membership, down from 88% last year. Awareness of the Santander Cycles self-guided bike rides is lower, with just over a fifth of users aware.

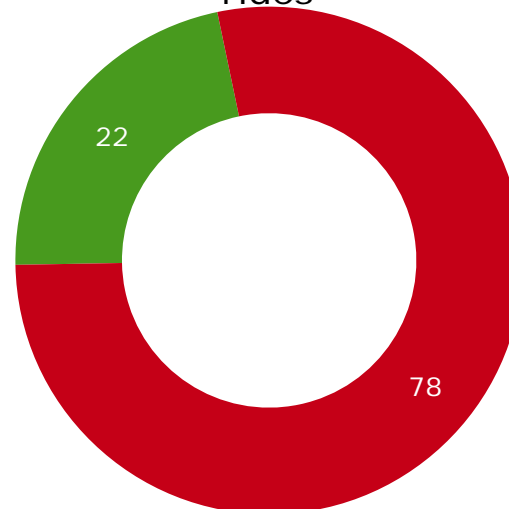
Awareness of membership
(among UK residents using Santander Cycles at least once a fortnight)

%



■ Yes ■ No

Awareness of Santander Cycles self-guided bike rides

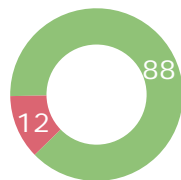


■ Yes ■ No

40% of UK residents using Santander Cycles at least once a fortnight are interested in becoming a member

Q23a. Are you aware that you can register as a member to get a key for quicker access to the bikes, and it could save you money?/ Q19. Which, if any, have you done as a result of the introduction of the Santander Cycles scheme? Base: living in the UK and using Santander Cycles once a fortnight or more: W3: 613; W4: 476 Q36. Are you aware of the Santander Cycles self-guided bike rides, available online? Base: Casual users W4: 1051

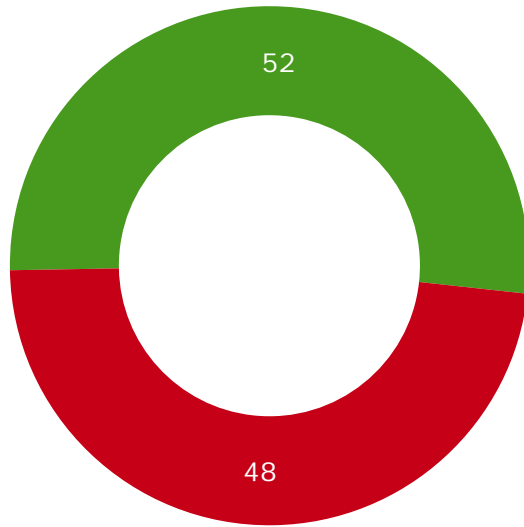
W3



Just over half of all casual users own a bicycle and almost nine in ten have an Oyster Card. A further 10% say they do not use public transport in London.

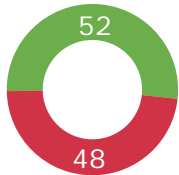
Ownership of a bicycle
(among all casual users)

%

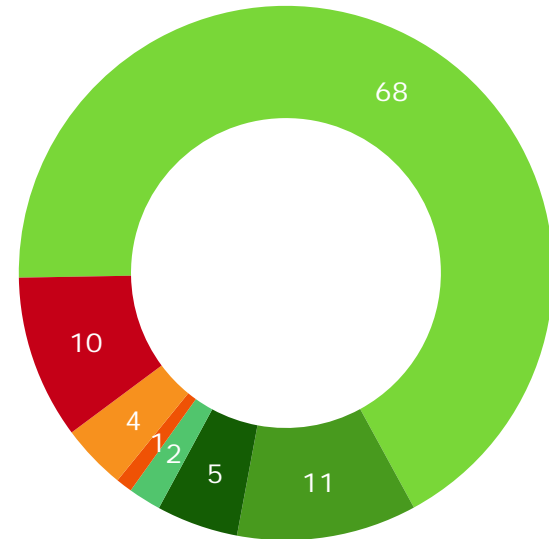


■ Yes ■ No

W3



Ownership of an Oyster Card



- Oystercard PAYG/pre pay
- Oystercard weekly
- Oystercard monthly
- Oystercard yearly
- I use day paper travelcards
- I use single/return paper tickets
- I do not use public transport in London

Q24. Do you own a bicycle? / Q36. Are you aware of the Santander Cycles self-guided bike rides, available online? Base: Casual users: W3: 1179; W4: 1051
 Q35. Do you have an Oyster card? Base: Casual users W4: 1051

