

88% OF RESPONDENTS AGREED
WITH THE STATEMENT THAT

“ bike share makes
the city a better
place to cycle „

Scotland Bike Share Users Survey

www.como.org.uk

2019/20

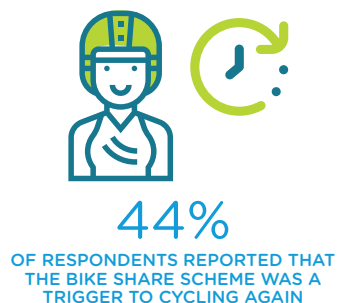
comouk 
supporting shared transport

2019 Survey Key Findings

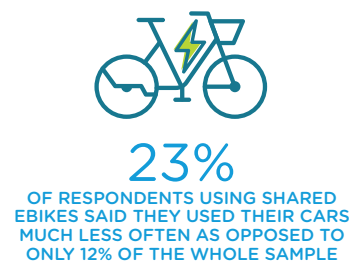
THE GENDER SPLIT OF BIKE SHARE
USERS IS MUCH MORE EVEN THAN FOR
GENERAL CYCLING



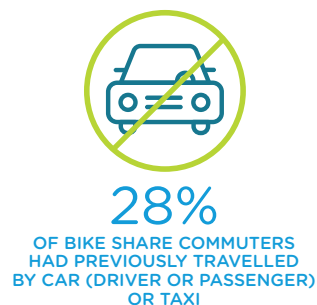
BIKE SHARE IS A TOOL FOR
RE-ENGAGING CYCLISTS



SHARED EBIKES REDUCE CAR USE
EVEN MORE THAN CONVENTIONAL
BIKE SHARE



BIKE SHARE
REDUCES CAR USE



CoMoUK has published the annual UK Bike Share Users Survey since 2016. This is the first year that Scottish data has been extracted to create the 2019 Scottish Bike Share Users Survey, completed by 799 users of Scottish schemes. The majority of results were from Glasgow (69%), Edinburgh (17%) and Stirling (14%).

Overall the survey shows a growth in bike share with 59% of users joining a scheme in the last two years. It also demonstrates how it is a catalyst for active travel and that the majority of respondents think it enhances public transport. The report has been broken down into themes such as demographics of bike share users, purpose of journeys and the potential for modal shift.

Key findings from the survey show:

An increase in cycling:

- 64% reported an increase in cycling trips due to bike share.
- 44% said bike share was the trigger to start cycling again.

Potential for modal shift:

- 28% said they previously travelled by car (driver or passenger) for commuting.
- 36% said they were using their car much less overall.

Health benefits:

- 52% of survey users reported on exercise and health benefits.
- 31% said they chose to use bike share to help with mental health.

Demographics and social inclusion:

- The gender split in bike share is more even than in general cycling (38% women, 59% male).
- By reducing membership costs and providing cycling support, underrepresented groups in cycling become more represented. In Glasgow's Bikes for All project, 61% of users are from the most deprived areas of Glasgow and 49% were from Black Minority ethnic groups.

The impact of ebikes on bike share:

- The proportion of users commuting by bike share more than doubled, when respondents had access to ebikes.
- The extent to which people were able to reduce their car use was higher for those with access to electric bikes in their scheme.

Methodology

The Bike Share User Survey was produced by CoMoUK in conjunction with UK bike share operators, and local authority representatives. It was distributed via email, and social media, across the UK to users of schemes in 35 towns and cities.

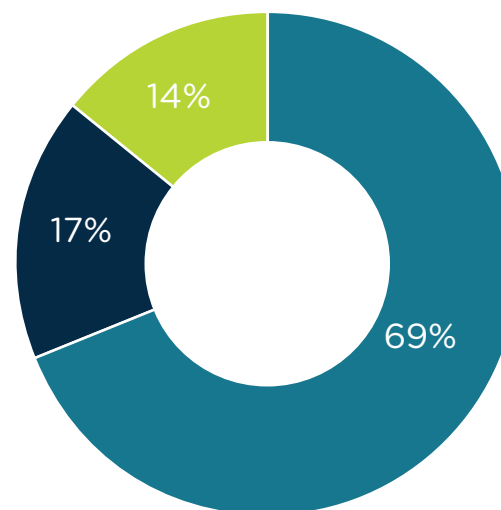
There was a total of 2405 responses with 799 responses from Scottish schemes. These have been extracted to form the Scottish survey.

The majority of survey results were from Glasgow (69%) then Edinburgh (17%) and Stirling (14%). Nextbike run both the Glasgow and Stirling schemes and Serco manage the Edinburgh system. Of those responding, 59% of users had joined a scheme in the last 2 years and 17% in 2017.

As in previous years, as an incentive, respondents were given the opportunity to enter a prize draw to win one of 5 £50 shopping vouchers.

The results were analysed by independent consultant Conor Walsh and verified by Dr Sally Cairns, of Sally Cairns & Associates Ltd.

799 responses from Scottish schemes



Demographic of bike share users

The gender split for bike share users, as indicated from the 2019 survey, was 59% male compared to 38% female (with 3% of the sample not responding, 'other' or 'prefer not to say').

These figures can be compared to the Scotland Household Survey which indicates that far fewer women cycled in the last 4 weeks than men (woman 9%, men 17%).

THE GENDER SPLIT OF BIKE SHARE USERS IS MUCH MORE EVEN THAN FOR GENERAL CYCLING



Age

The age spread of bike share users was from 15 to 75 with the majority in the 25-54 category (74%), including 33% in the 25-34 group, 26% in the 35-44 group and 15% in the 45-54 group.

Ethnicity

The percentage of White British respondents was 65%, 23% selected the category "white other", 3% identified as Asian / Asian British and 2% as "mixed multiple ethnicity".

Employment

66% of respondents stated they were employed; 17% were students; and the remainder were retired or unemployed. Responses were received from all income groups, 26% were on an income of less than £20,000 including 12% of the total who were on an income of less than £10,000.

Bikes for All

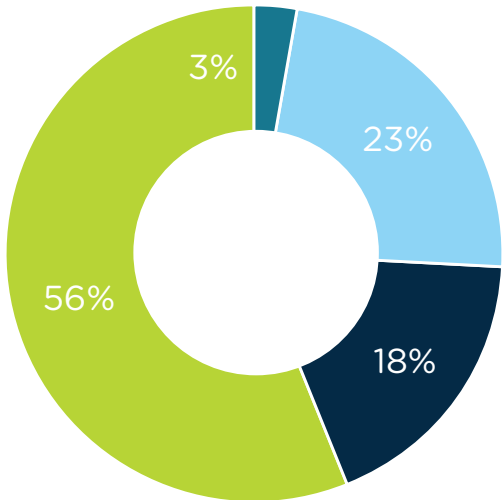
It is worth highlighting results from the Glasgow Bikes For All project where CoMoUK has worked with nextbike and Glasgow Bikes for Good to carry out targeted interventions to support cycling amongst disadvantaged, marginalised and low income communities. Here the demographic makeup was more diverse. Of all the respondents to the Bikes for All survey, 61% of those are from most deprived areas of Glasgow, 28% are unemployed, 49% were from Black Minority ethnic groups and 36% were seeking asylum or had refugee status.

For the full report see www.como.org.uk/shared-mobility/shared-bikes/why/

Potential to attract new cyclists

As with the survey responses from previous years, the data indicates that bike share is a catalyst to re-engaging with cycling. 26% of respondents said they had begun cycling after a gap of 5 years or more, and a further 18% hadn't ridden a bicycle for between 1 and 4 years.

- Cycling for the first time ever
- Cycling for the first time after a long break (5 years +)
- Cycling for the first time after a shorter break (1-4 years)
- None of the above - I already cycled



BIKE SHARE IS A TOOL FOR RE-ENGAGING CYCLISTS



44%

OF RESPONDENTS REPORTED THAT THE BIKE SHARE SCHEME WAS A TRIGGER TO CYCLING AGAIN



Increasing cycling trips

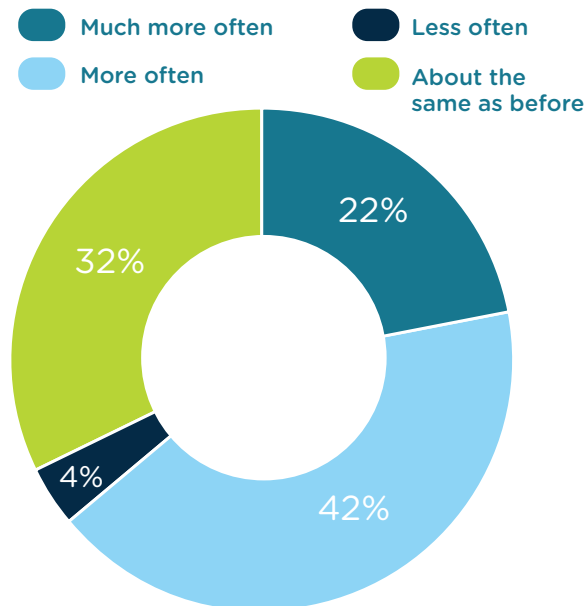
The survey asked whether users had changed the amount that they cycle since they started using the scheme. Well over half (64%) reported an increase, with 42% stating that they are cycling more often and a further 22% choosing the option indicating that they are cycling “much more often.”

In some cases, bike share triggers users to go on to buy their own bike - 12% of respondents said they had bought a bike since joining. Given that a further 47% reported that they already own a bike, it appears that, for many people, personal

bike ownership and use of a bike share scheme are complementary and used for different types of trips rather than being alternatives to each other. Bike share is particularly useful for last mile trips from public transport or Park and Ride interchanges but also for when people only need to cycle for one section of their days travel.

Meanwhile, 9% of respondent’s said they owned a bike but it was in disrepair and 3% had got rid of their personal bike.

Change in cycling levels since using bike share



BIKE SHARE IS A COMPLEMENT TO OWNERSHIP



12%
OF USERS IN SCOTLAND WENT
ON TO BUY A BIKE
—
47%
USE A PERSONAL BIKE AS WELL
AS BIKE SHARE.



Health benefits

There is a large amount of evidence to support the theory that bike share increases physical activity, and has positive impacts on both mental and physical health.

When asked about the total amount of moderate or vigorous exercise done in the last week through using bikeshare :

- 10% said they had done the Government's recommended 2.5 hours a week or more
- 22% had done between 1 and 2.5 hours
- 33% less than 1 hour
- 36% reported that they had done none. This is presumably because they had not used the scheme.
- 12% of respondents reported that use of bikeshare is the only moderate to vigorous exercise they get on a regular (weekly) basis.

BIKE SHARE OFFERS A VALUABLE OPPORTUNITY TO INCREASE PHYSICAL ACTIVITY LEVELS



12%

OF RESPONDENTS REPORTED THAT THIS WAS THE ONLY MODERATE TO VIGOROUS EXERCISE THEY GET ON A REGULAR (WEEKLY) BASIS

AS HIGHLIGHTED IN THE NEXT SECTION



52%

SPECIFICALLY REPORTED ON EXERCISE/PHYSICAL HEALTH BENEFITS

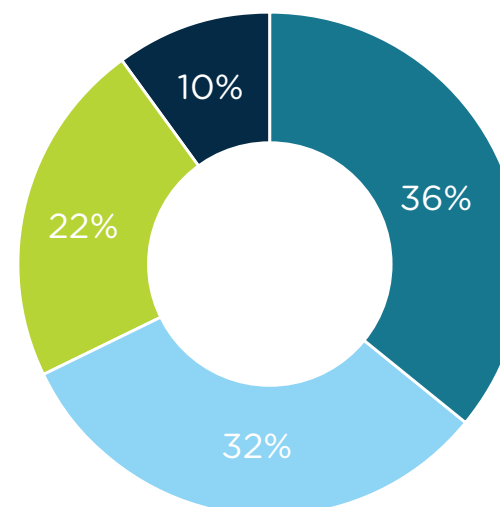


31%

REPORTED ON MENTAL HEALTH BENEFITS, AS REASONS WHY THEY CHOOSE TO USE BIKE SHARE SCHEMES

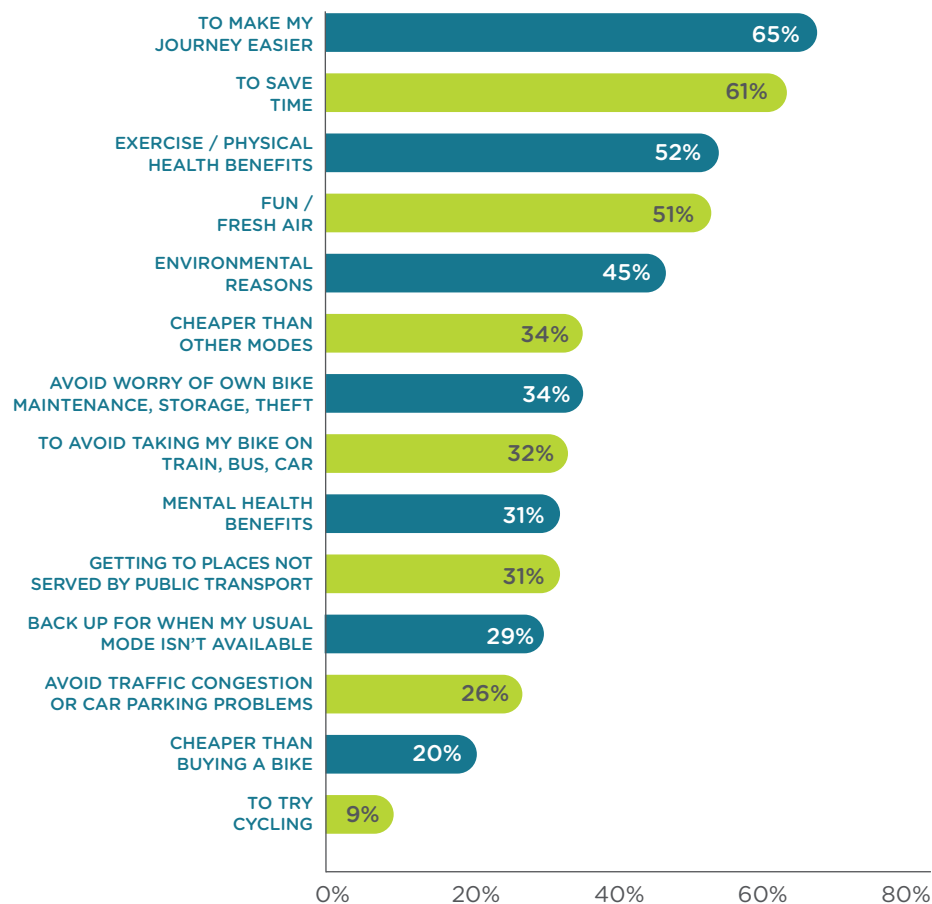
Amount of moderate or vigorous exercise done in the last week through using bikeshare

- None
- Less than 1 hour
- 1 hour to less than 2.5 hours
- 2.5 hours or more



Personal benefits of opting to travel by bike share

Respondents were asked to choose 'all that applied' from a list of reasons for using the bike share scheme. The 2019 survey results for Scotland schemes show that convenience (time savings and ease), exercise and fresh air were the top reasons for choosing bike share.



Trip purpose

Respondents were asked how often they use bike share for a range of different journey purposes. 31% of respondents used a bike to travel to work at least once a week, and a further 9% of respondents used a bike for a business trip at least once a week.

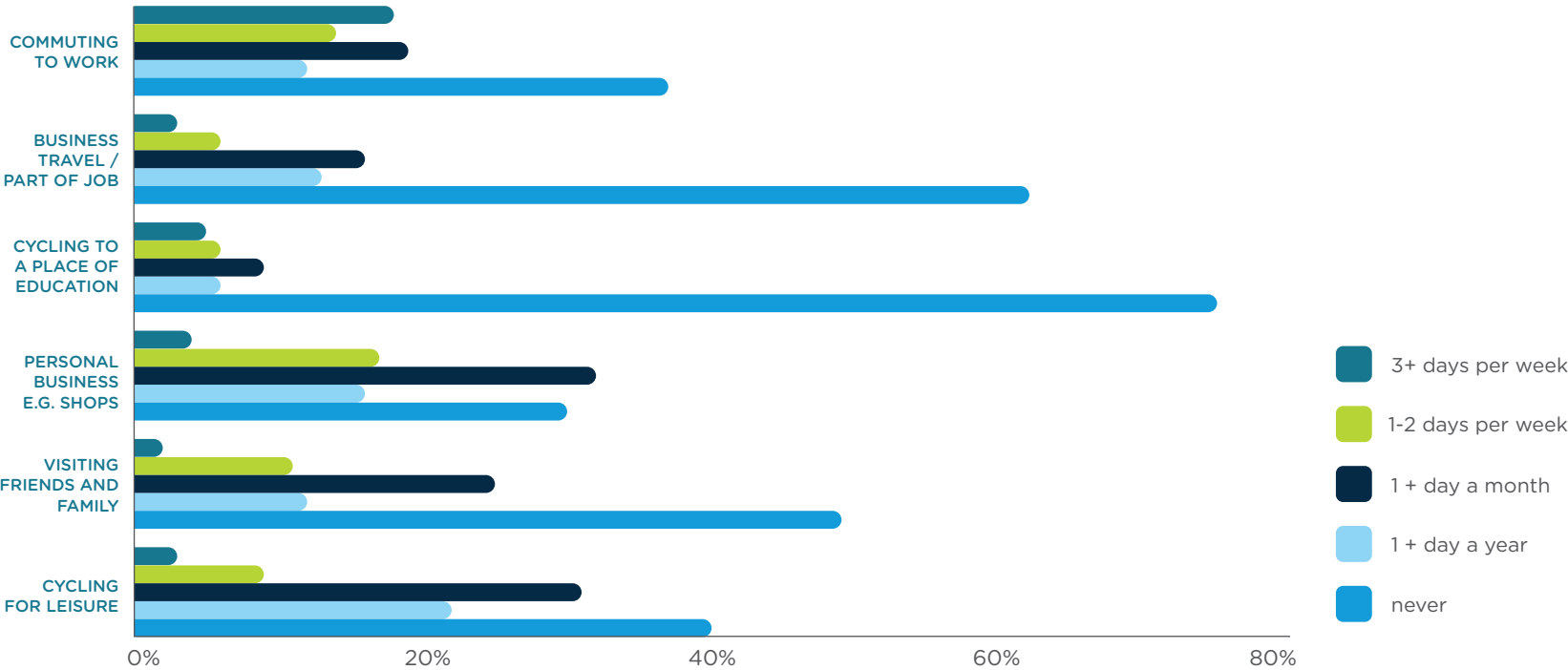
Other trip purposes included: cycling for leisure (38% >1 trip per month); personal business trips, (53% >1 trip per month) and visiting friends and family (39% >1 trip per month).

The proportion of users commuting by bike share more than doubled, when looking at the sub-sample (610 respondents) with access to electrically-assisted bikes.

SHARED EBIKE SCHEMES SUPPORT USERS TO CYCLE TO WORK MORE FREQUENTLY



60%
OF THOSE USING EBIKES SHARE REPORTED THAT THEY WERE COMMUTING



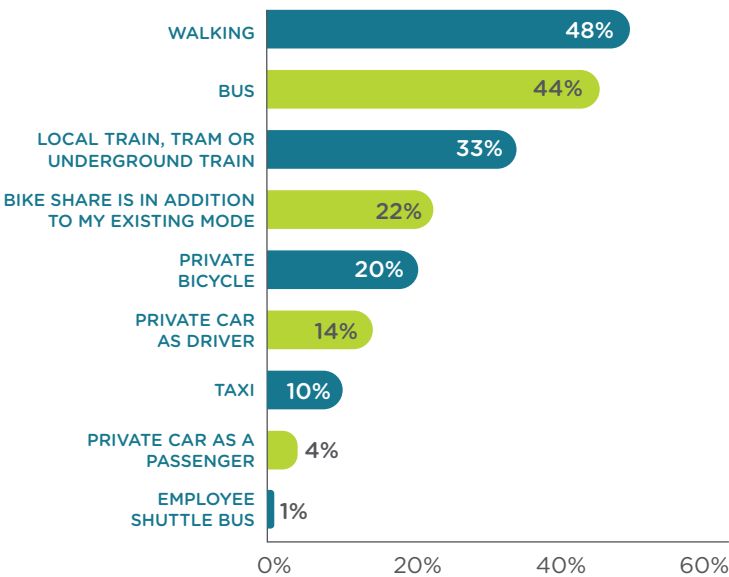
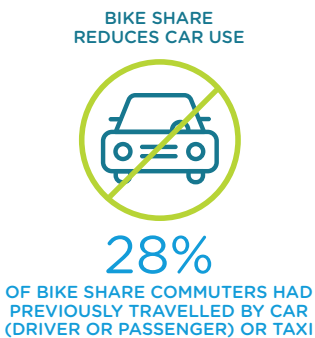
Mode shift for commuting

Bike share commuters in Scotland were asked how they previously travelled to work. Respondents could choose more than one option.

The results for all cities combined were:

- 48% previously walked
- 44% were using the bus
- 33% switched from the train /tram or underground
- 20% previously used their own bike
- 28% said they previously travelled by car (driver or passenger) or taxi, suggesting the potential for bike share to reduce congestion and pollution.

A separate question asked whether bike share commuters had changed the amount they use their car. 36% said they were using their car either much less (12%) or less (24%). The remaining respondents were using their car about the same amount. (Respondents were given the option to choose more often, or much more often, but did not do so).

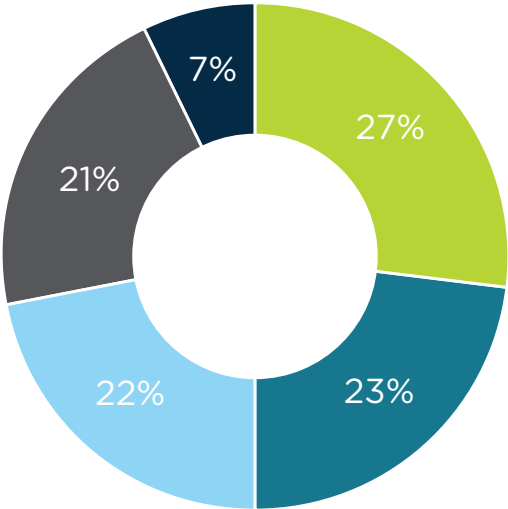


Electric bikes in bike share

The extent to which people were able to reduce their car use was higher for those with access to electric bikes in their scheme.

There are many reasons for using an ebike, the most popular by respondents was to make it easier riding up hills. Closely followed by, avoiding fatigue or getting sweaty and travelling longer distances.

- Cycling up hills
- Avoiding fatigue or getting sweaty
- Travelling longer distances
- Faster journey times
- Health difficulties



SHARED EBIKES REDUCE CAR USE
EVEN MORE THAN CONVENTIONAL
BIKE SHARE



23%
OF RESPONDENTS USING SHARED
EBIKES SAID THEY USED THEIR CARS
MUCH LESS OFTEN AS OPPOSED TO
ONLY 12% OF THE WHOLE SAMPLE



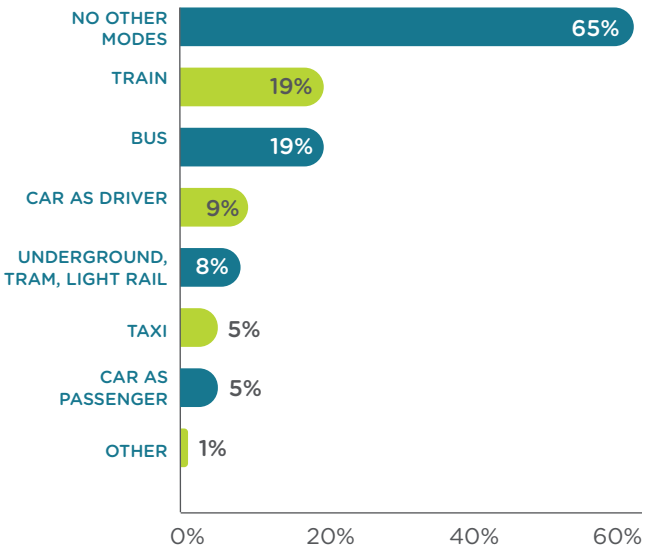
Multi modal trips

Bike share adds flexibility and convenience to journeys, and is often used for either the first or last mile.

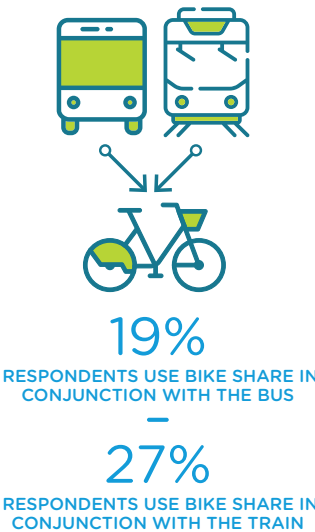
When asked about their views on the statement “bike share enhances public transport”, 90% of people agreed.

For their most recent trip using bike share, 19% of respondents used bike share in conjunction with the bus, 19% with the train, 8% with underground or tram and 14% with car and 5% with taxi.

Bike share used in conjunction with other forms of transport



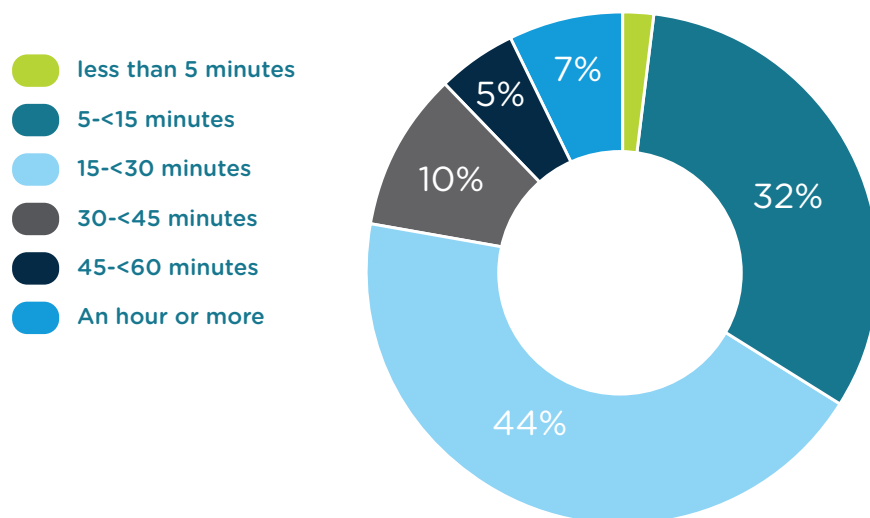
BIKE SHARE ENABLES USE OF PUBLIC TRANSPORT BY OFFERING A LAST MILE SOLUTION.



Trip length

In terms of the trips made using bike share, around a third (32%) of respondents reported their most recent ride was between 5-15mins and just under half (44%) said 15-30mins.

When looking at the time taken to walk to a bike, most people (63%) said it was a less than a 5-minute walk while a quarter said it took them 5-10mins. A similar number (66%) reported a time of less than 5mins from the drop-off location to final destination.



Customer satisfaction

When asked to rate the different aspects of the public bike share service, the majority of elements were rated as 'very' or 'fairly satisfactory' by at least 70% of respondents. Station coverage remained as one of the lowest rated areas, with 25% of respondents saying they were very or fairly dissatisfied. This was also the main topic raised in free comments.

The Impact of bike share stations and models on users

Around half of respondents indicated that they preferred hybrid models of bike share, where bikes are mostly found in stations but can also be found and parked elsewhere. The remainder were split between those who preferred 'free-floating' bike share and those who preferred fully station-based options.

The survey showed that a lack of bikes in particular areas discouraged many users from trying a bike share scheme. Not being able to guarantee an available bike also resulted in many riders giving up on using a scheme prematurely. Lack of coverage at transport hubs, including stations, also made many journeys impractical.

Of those respondents who indicated that they hadn't used a scheme yet (323 respondents), around one third mentioned that this was due to a lack of convenient stations, whilst another 20% said they preferred to use their own bike. Disappointingly, 13% said they hadn't hired a bike as they had encountered a specific problem with the service when trying to hire a bike.



Use of co-mobility services

Respondents were asked how likely they were to use other shared mobility services, with the options of 'already using it', 'likely to use', 'unlikely to use' and 'unsure/don't know'.

68% said they were 'likely to use' shared electric bikes. 46% were likely to use a monthly account / contract giving use of a range of

transport services (Mobility as a Service), whilst 39% said they were likely to hire shared e-scooters if they were made legal on UK roads. There was also considerable interest in the use of car clubs (28%), ride share (27%), shared taxis (31%) and demand responsive bus services (22%).

BIKE SHARE USERS ARE LIKELY TO USE OTHER SHARED MOBILITY SERVICES



68%
SHARED
ELECTRIC BIKES



46%
MOBILITY AS
A SERVICE



27%
RIDE SHARE
(PRIVATE CAR)



39%
SHARED
ELECTRIC SCOOTERS



28%
SHARED CARS
(CAR CLUBS)

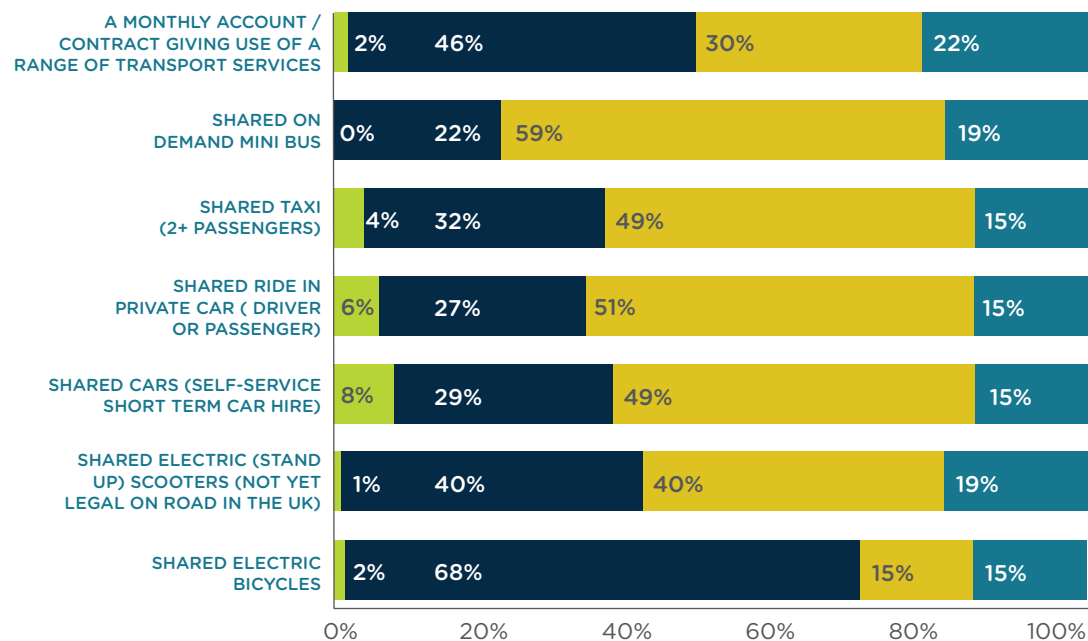


31%
SHARED
TAXIS



22%
SHARED ON
DEMAND MINI BUS

How likely are you to use the following types of transport (if they were available in your area)?



■ Already using
 ■ Unlikely to use
■ Likely to use
 ■ Unsure or don't know



Find out more about bike share online at
www.como.org.uk | scotland@como.org.uk

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