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bike share was their catalyst  
to start cycling again ,,

# CoMoUK Annual Bike Share Report

[www.como.org.uk](http://www.como.org.uk)

# 2021



# 2021 report key findings

BIKE SHARE IS A TOOL FOR  
RE-ENGAGING CYCLISTS



50%

OVER HALF OF BIKE SHARE USERS  
SAID THAT BIKE SHARE WAS THE  
CATALYST TO START CYCLING AGAIN

BIKE SHARE  
REDUCES CAR USE



53%

RESPONDENTS WOULD HAVE MADE  
THEIR LAST TRIP BY CAR (DRIVER OR  
PASSENGER) OR TAXI, IF BIKE SHARE  
HAD NOT BEEN AVAILABLE

BIKE SHARE OFFERS A VALUABLE  
OPPORTUNITY TO INCREASE PHYSICAL  
ACTIVITY LEVELS



20%

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

E-BIKES REDUCE CAR  
USE EVEN MORE THAN  
CONVENTIONAL BIKE SHARE



34%

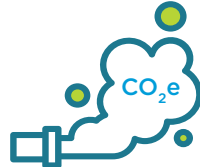
OF RESPONDENTS USING E-BIKES  
SAID THEY WERE REPLACING CAR  
OR TAXI TRIPS OF MORE THAN 5 MILES  
PER WEEK AS OPPOSED TO 24% OF  
NON-E-BIKE USERS



31%

OF THOSE SURVEYED USE BIKE  
SHARE FOR COMMUTING AT  
LEAST ONCE A WEEK

BIKE SHARE USERS REDUCE  
CARBON EMISSIONS



ON AVERAGE, PER USER, THERE MAY  
BE A REDUCTION OF ABOUT 3.7 CAR  
MILES AND 1KG OF CO<sub>2</sub>e EVERY WEEK





# Foreword

The CoMoUK annual bike share report is a key tool for understanding the performance and impacts of the UK's bike share schemes. This is our sixth annual report. We find that bike share re-attracts people into cycling, supports health and wellbeing, triggers sustainable travel behaviours, cuts car miles and works alongside bike ownership.

At the end of September 2021, there were 39 locations served by bike share in the UK, noting that this counts London as one location. New schemes that launched in the previous 12 months include Cambridge and York. It was disappointing to see the closure of the Edinburgh scheme, although it is pleasing to see the renewed commitment from the city authorities to re-launch it.

There is a gradual increase in schemes offering a mix of shared bikes and e-bikes (now in nine locations) and many new operators have launched with e-bikes only (12 locations). E-bikes are now firmly established as a popular component of bike share and cycling more generally.

Utilisation has picked up across schemes in 2021. Some sites dominated by use by university students had suffered significant drops in usage but have seen a strong recovery in the second half of 2021, such as Swansea and Guildford.

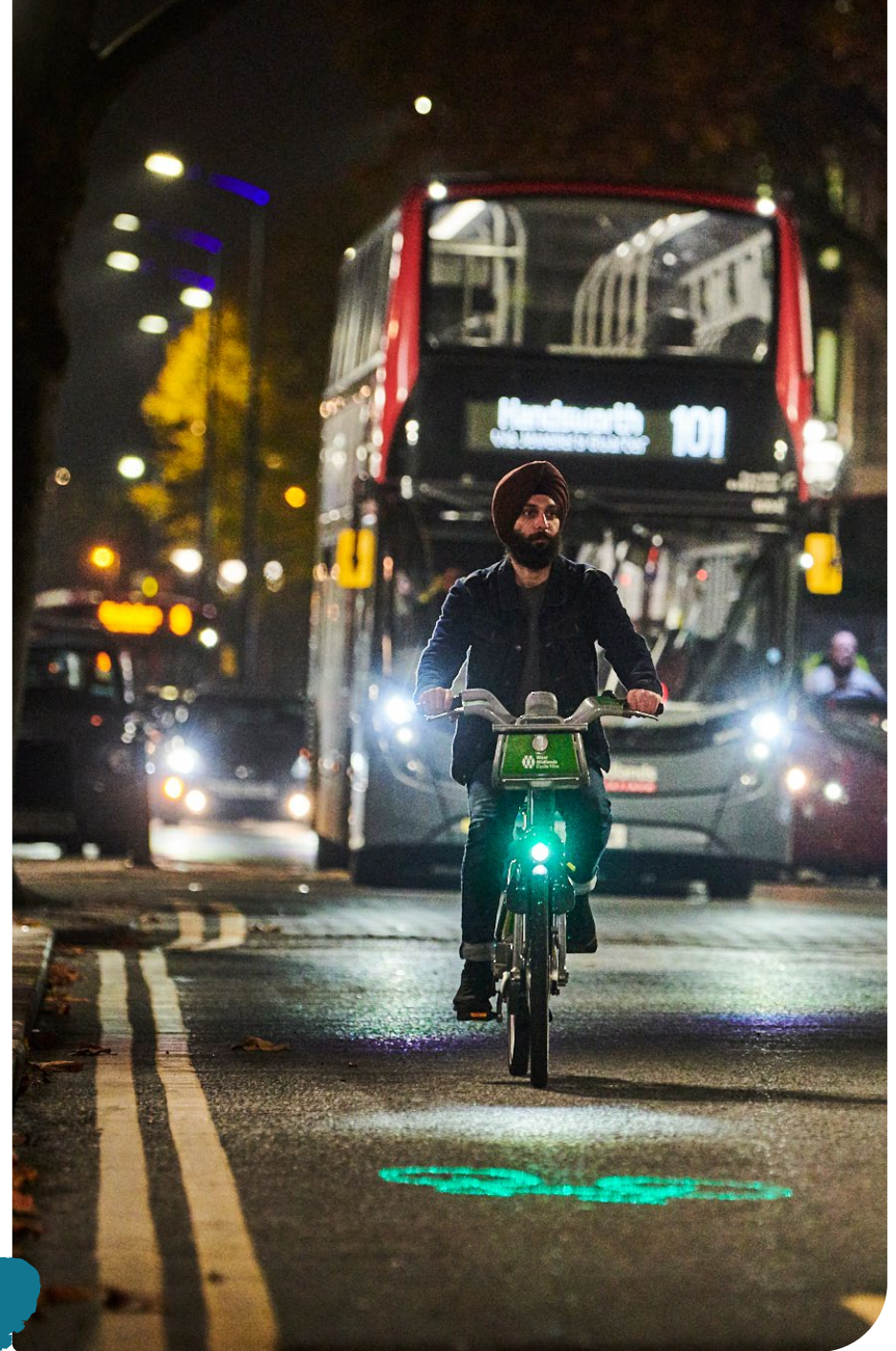
Eight schemes are operating alongside a shared e-scooter trial. Half of these are managed by the same company that operates the e-scooter trial, whilst half are managed by separate operators.

## Bike share metrics September 2021

**39**  
schemes

**22,789**  
bikes

**41,599**  
average trips  
per day



# Methodology

The CoMoUK annual bike share report is produced by CoMoUK, the charity dedicated to the public benefit of shared transport, in conjunction with accredited UK bike share operators and local authority representatives.

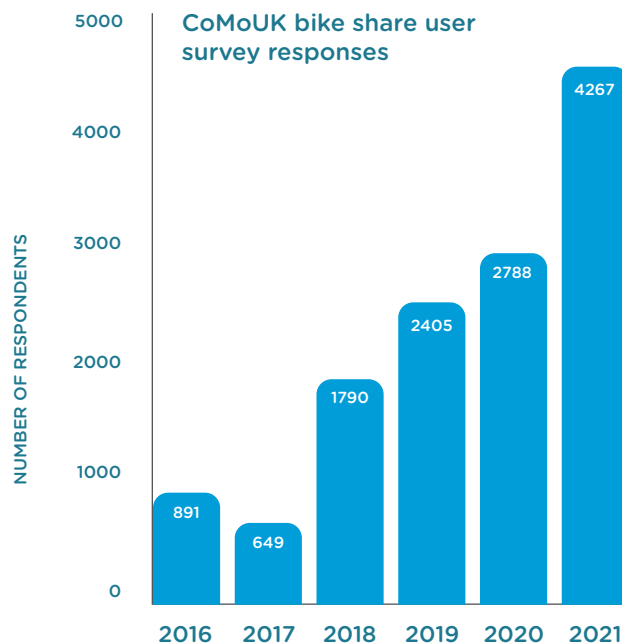
It was distributed via email and social media, to users of 39 schemes run by: Hourbike, Nextbike, Serco, Beryl, Lime, Ride-on, HumanForest, Co-Bikes and TfL, for completion between 10 September and 25 October 2021.

As in previous years, respondents were given the opportunity to enter a prize draw to win one of five £50 food shopping vouchers as an incentive. For the first time, the majority of operators offered rider credit as an additional incentive.

In all cases, where questions were left blank, responses are reported as the percentages of those who answered the question.

In total, a record 4,267 responses were received, compared to 2,788 in 2020, 2,405 in 2019 and 1,790 in 2018. 927 respondents (up from 603 in 2020) reported that they used an e-bike through a bike share scheme.

The results were analysed and verified in conjunction with Dr Sally Cairns of Sally Cairns & Associates Ltd.



# Survey responses

Overall, the response rate was the highest received and covered many geographical areas.

However, the numbers do not always reflect the size of the schemes, with London and some other larger cities rather under-represented. The closure of the Edinburgh scheme reduced responses there significantly.

Brighton continued to return a high response rate, with responses comprising 26% of the total sample.

The remainder was spread across many of the newer schemes including Cardiff (6%), Birmingham (7%), Cambridge (7%), Bournemouth (6%), Norwich (6%), and Coventry (3%), with many respondents taking part in the survey for the first time.

The majority of 346 respondents from London were using the TfL Cycle Hire scheme (142), with Lime (88) and HumanForest (72) making up most of the rest.

Respondents stating they used an e-bike came from a wide variety of locations with the majority from Cambridge, Glasgow, Norwich or London.

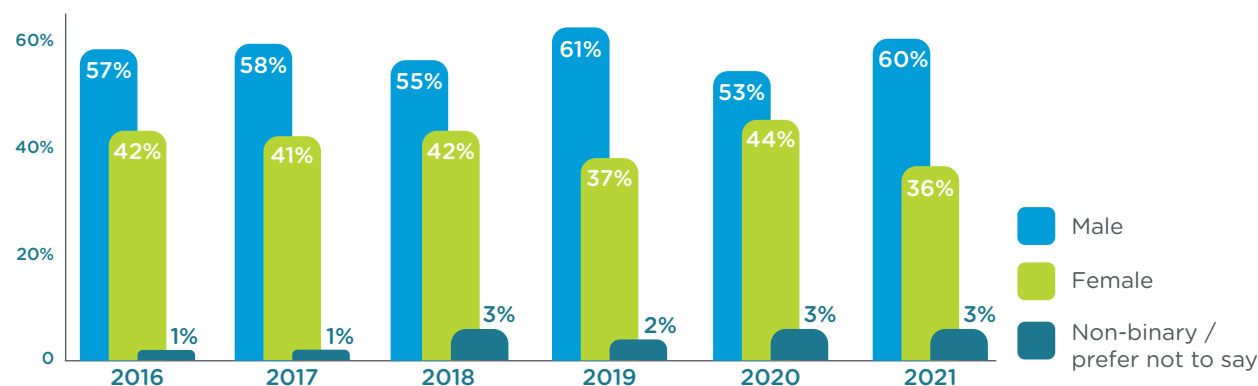




# Demographic of bike share users

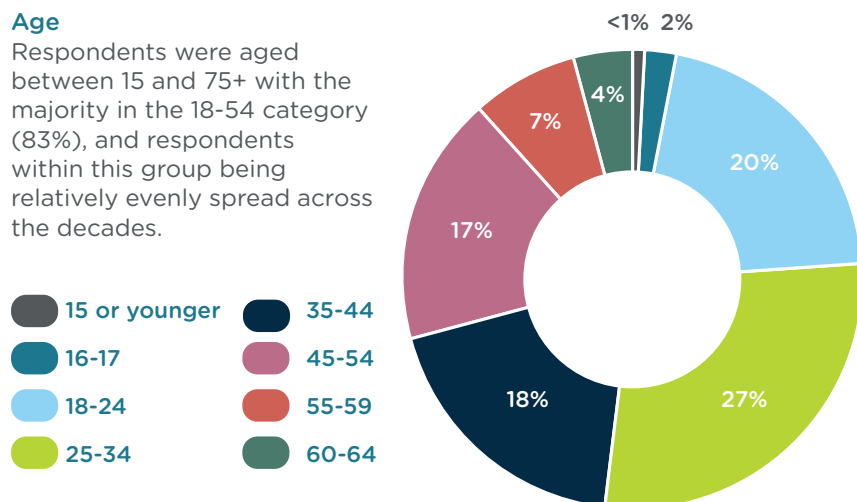
The gender split for bike share users, as indicated from the 2021 survey, was the least even of the results obtained over the last 6 years: 36% female, 60% male, 2% non-binary or other and 1% prefer not to say.

These figures can be compared to the 2020 National Travel Survey on this area, where, on average, men made more than double the number of cycle trips compared with women.



## Age

Respondents were aged between 15 and 75+ with the majority in the 18-54 category (83%), and respondents within this group being relatively evenly spread across the decades.



## Ethnicity

The percentage of respondents who identified as 'White British' was 76%, whilst 9% identified as 'Asian / Asian British' (4% in 2019); 4% as 'Black (African, British, Caribbean)'; 4% as 'mixed multiple ethnicity'; and 3% as other ethnic groups (with the remainder 'prefer not to say'). This shows that bike share schemes are attracting a relatively diverse group of users, given the ethnic profile of Britain.

## Income levels

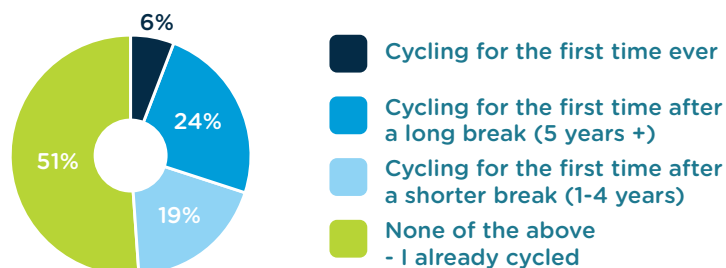
72% of respondents stated they were employed; 12% were students; and 3% were retired. 4% were unemployed, an increase from 1% in 2019. (The remaining 9% indicated 'other' or 'prefer not to say').

Responses were received from all income groups. Of those who answered the question about individual personal income (66% of all respondents), 43% (up from

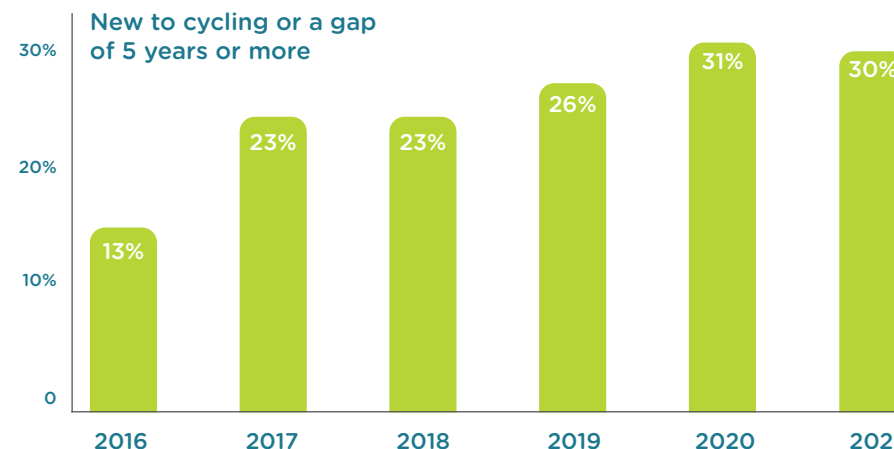
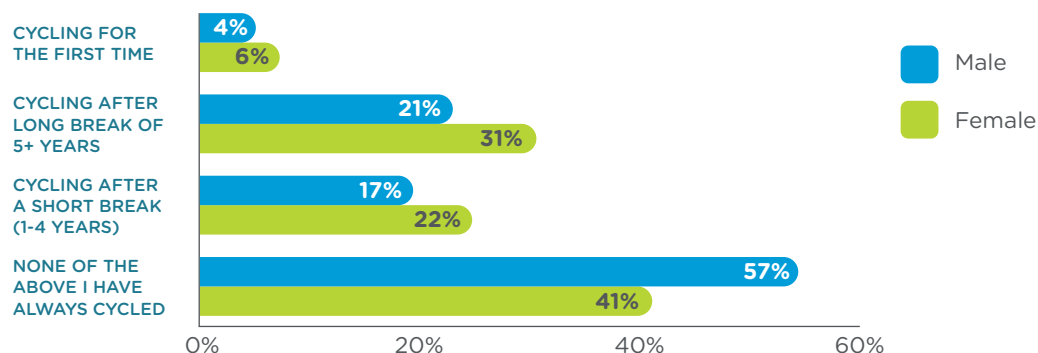
26% in 2020) were on an income of less than £20,000, including 13% of the total who were on an income of less than £10,000. These statistics could reflect the economic changes being felt as a result of the Covid pandemic and indicate that bike share is an affordable transport option for many people.

# Potential to attract new cyclists

The CoMoUK annual bike share research has consistently found that bike share is a catalyst to re-engaging with cycling. In the 2021 results, 49% of respondents (55% in 2020 and 44% in 2019) said that joining the scheme was a catalyst to them cycling for the first time in at least a year. This included 24% of people who hadn't ridden for 5 years or more, and 6% (2% in 2020) who were new to cycling. Meanwhile, the number stating that they were already cycling was 51% (45% in 2020 and 55% in 2019).



When looking at the gender split of responses to the question, a higher proportion of women compared to men (37% vs 25%) were more likely to have started cycling for the first time or after a 5+ year break.



“The e-bikes and scooters have been fantastic for trips where parking would otherwise be an issue and walking would take too long, such as trips into town, or delivering leaflets to residents around my ward.”

BIKE SHARE IS A TOOL FOR RE-ENGAGING CYCLISTS



50%

OVER HALF OF BIKE SHARE USERS SAID THAT BIKE SHARE WAS THE CATALYST TO START CYCLING AGAIN

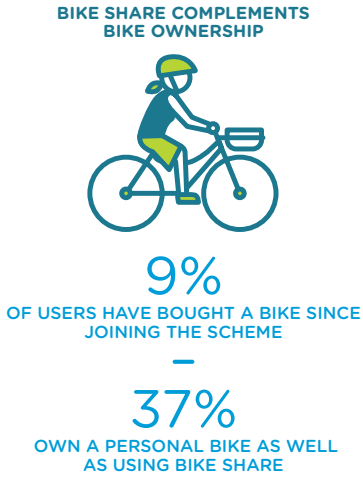
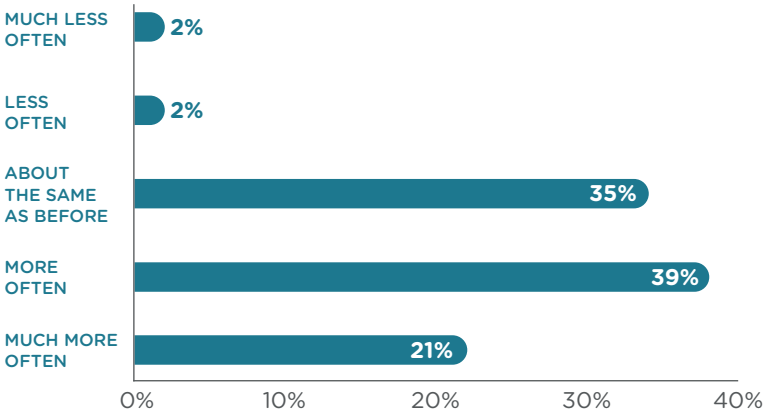
# Increasing cycling trips

The survey asked users whether they had changed the amount that they cycle since they started using the scheme. Consistent with previous years, well over half (60%) reported an increase, with 39% stating that they are cycling more often and a further 21% choosing the option indicating that they are cycling ‘much more often.’ When looking at just those who reported that they have used an e-bike, the proportion indicating they were riding much more often rises to 29%.

In some cases, bike share triggers users to go on to buy their own bike – 9% (314 people) of respondents said they had bought a bike since joining (including 88 people buying e-bikes). Given that a further 44% reported that they already own a bike, it is clear 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.

Meanwhile, 8% of respondents said they owned a bike but it was in disrepair, a further 8% had got rid of a bike and 28% don’t own a personal bike. In the ‘other’ category (3%), many people reported that they owned a bike in another location, indicating that the scheme was an alternative to transporting their bike to their current area. Another common response was “I used to own a bike but it got stolen”, indicating that people value bike share because it reduces their personal risk.

Change in cycling levels since using bike share



# Health benefits

70% of respondents said that the bike share scheme had contributed to their total physical activity in the last week, with 20% reporting that it was 'all' or a 'major part' of the physical activity they had done.

61% specifically chose the options of gaining exercise/ physical health benefits, and 41% mental health benefits, in answer to the question about the benefits of using bike share schemes.

BIKE SHARE OFFERS A VALUABLE OPPORTUNITY TO INCREASE PHYSICAL ACTIVITY LEVELS



20%

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

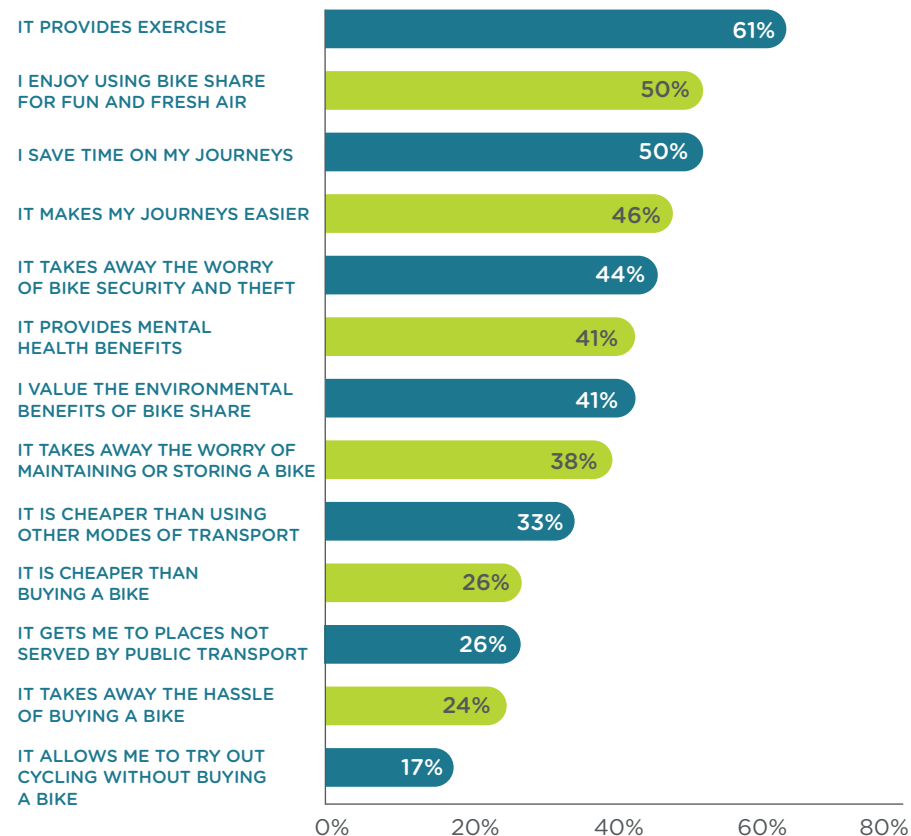
“ I enjoy the bike scheme as it helps me know I'm reducing CO<sub>2</sub> emissions and get to work quickly without having to use a car. ”

“ I enjoy running outside, yet I don't have more than about 90 minutes per day that I can do it. The electric bikes and scooters meant that I could go on a greater variety of runs by taking the bike to the beginning of the run and returning with it after the run. ”

“ I'm a student and I love cycling to uni every day! Electric cycling through the meadows nearby is so peaceful and beautiful! ”

# Personal benefits of opting to travel by bike share

Respondents were asked to choose 'all that applied' from a list of statements for the benefits they gain from using the bike share scheme. The most popular options were exercise, time savings and for fun and fresh air.





# Trip purpose

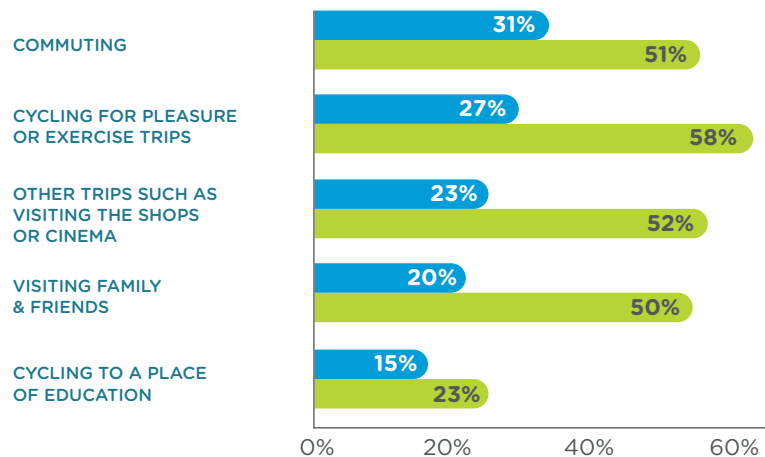
Respondents were asked how often they use bike share for a range of different journey purposes. The most common trip purposes were commuting and trips for pleasure, although at least 15% of people were using bike share regularly for all trip purposes listed. 31% of respondents were using a bike to travel to work at least once a week. In comparison, this was only 17% in 2020, down from 30% in 2019, likely illustrating a temporary dip due to Covid-19. About half of all respondents use bike share for commuting at least once a month.



31%

OF THOSE SURVEYED USE BIKE SHARE FOR COMMUTING AT LEAST ONCE A WEEK

- % using bike share for this purpose at least once a week
- % using bike share for this purpose at least once a month (including weekly users)



“

I have a knee problem so can no longer cycle using a regular bike. I have my own e-bike but I am very worried about it getting stolen so tend to only use it when I know that I have secure cycle parking available. Being able to hire an e-bike or scooter makes getting to the train station, or evening meals out, much more convenient and without the worry of theft.”



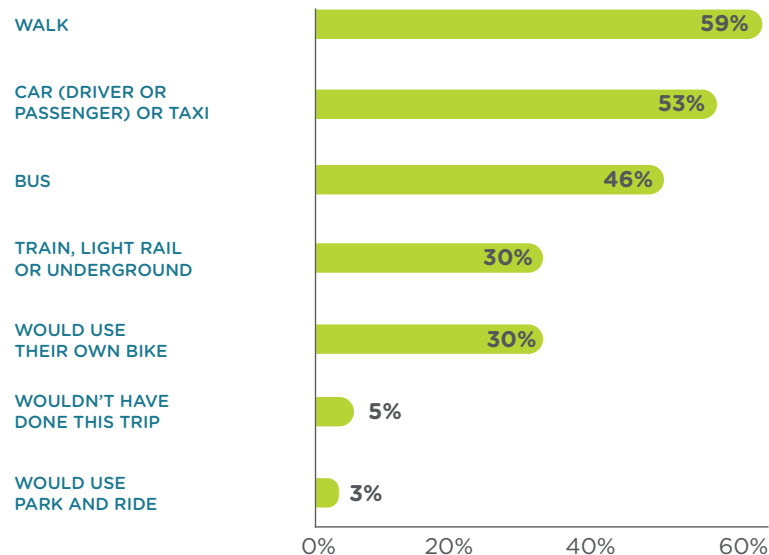
# Car use and alternative modes

Users were asked which modes they would use for their 'most common trip' if bike share wasn't an option. Respondents could choose more than one option, partly to cover multi-modal trips.

## The results for all cities combined were:

- 53% said they would travel by car (driver or passenger) or taxi, (up from 29% in 2020)

- 59% would walk
- 46% would use the bus
- 30% would use the train, light rail or underground
- 5% wouldn't have done this trip
- 30% would use their own bike (only 10% in 2020)
- 3% would use Park and Ride



There is a significant increase in the proportion saying that they might have used a car, with 53% saying they might have travelled by car (driver or passenger) or taxi in 2021 and 29% in 2020. The difference is likely to reflect a mix of increased popularity of schemes and the reduction of use of public transport due to Covid-19. (Note that there was also a wording change from asking about 'last trip' to now asking about 'most common trip').

Respondents were also asked about car ownership. About a third were non-car owners, whilst most were car owners, who didn't sell or gain a car since joining the bike share scheme. 2% (73 people) had gained a car since joining, whilst 4% (140 people) had got rid of a car. However, the numbers are too small to clearly assess whether the bike share scheme has contributed to this net reduction.

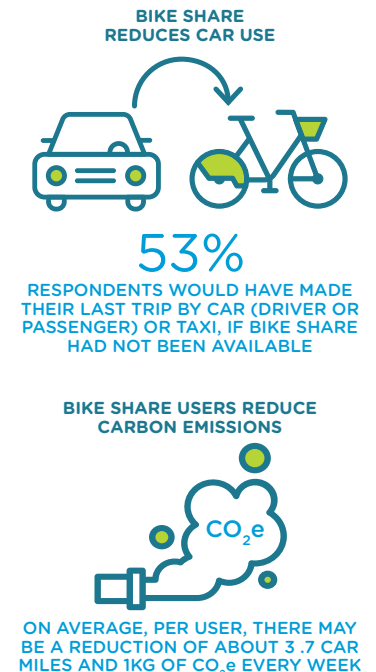
A separate question asked respondents: "If any bike share trips are replacing car or taxi trips - how many miles a week do they add up to

approximately?" Just over half (59%) of survey respondents answered this question. Of these, 55% were replacing up to 5 miles a week of car or taxi travel, 25% said >5-10 miles, 11% said >10-15 miles, and 9% said over 15 miles.

As a rough calculation, using the mid-points of each range (and conservatively assuming that >15 miles may average 17.5 miles per week), and leaving out those responding 'other', the implication is that, on average, those replacing car or taxi trips may, on average, be replacing about 6.2 miles of travel each week – equivalent to 3.7 miles of car/taxi travel per week for each bike share scheme member – although the savings will be considerably greater than this for some people (whilst others would never use a car/taxi).

If we take the greenhouse gas emission of an average car in the UK to be 277g CO<sub>2</sub>e/mile, and assume a straightforward reduction, this would result in savings in the order of 1kg of carbon dioxide equivalent per week or (assuming survey results

were representative of annual average cycling levels) 53kg of CO<sub>2</sub>e per bike share user per year. Obviously, this is a very rough estimate but indicates that bike share is making an important contribution to reducing car mileage, with all the environmental, health and congestion benefits implied, particularly given that many bike share trips are made in busy urban areas.





# Multi modal trips

Bike share is a useful tool to add flexibility and convenience to journeys and is often used either side of public transport to start or complete the trip. 30% reported that they did not combine their use of bike share with other modes, whilst 70% reported that they did. 39% of users stated they used a bus and 28% stated that they used a train as part of their overall journey with bike share.

These figures have returned to pre-pandemic levels. Over the 4 years of previous surveys (2016-2019), on average, 23% of users combined their trip with bus and 35% with train travel.

34% of users reported that they combine bike share with car use (driver or passenger), possibly implying that bike share is functioning as a form of park-and-ride.



# Electric bikes in bike share

The number of e-bikes in bike share schemes is increasing each year. There are now 9 schemes including e-bikes as an option alongside pedal bikes and 12 which are purely e-bikes. The majority of the responses in this survey from people using bike share e-bikes were from schemes with both types of bikes.

We asked those who rode e-bikes to give their reasons for choosing them. 915 people responded and the most popular reasons picked out were to shorten journey times, to tackle hills, and to avoid getting tired or sweaty from cycling. It is interesting to note that 18% said that the choice of an e-bike helped them to overcome health

difficulties or low fitness levels showing it is a tool to wider participation. In addition, 12% of people were trying them because they were considering buying one. Most of the comments in the 'other' category were variations on the reasons given in the table, with 'fun', 'because I was curious' and 'easier to ride' being mentioned multiple times.

REDUCE MY JOURNEY TIME

CYCLE UP HILLS

AVOIDING FATIGUE OR GETTING SWEATY

TO TRAVEL LONGER DISTANCES

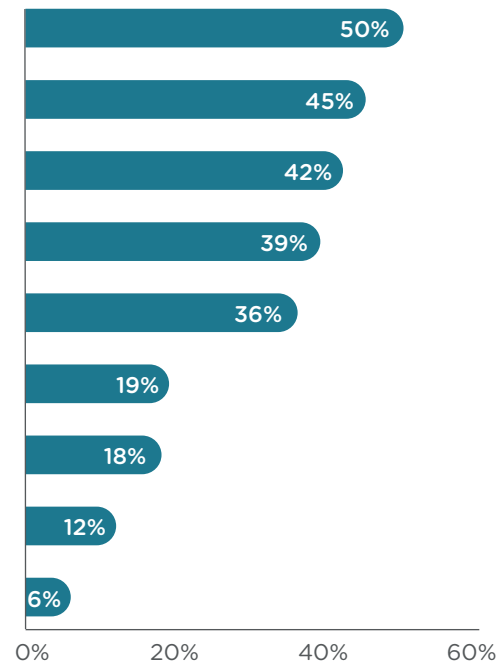
TO MAKE CYCLING MORE ENJOYABLE

THERE ARE ONLY E-BIKES IN MY SCHEME / NO CHOICE

OVERCOME FITNESS LEVELS OR HEALTH DIFFICULTIES

TO TRY-BEFORE-YOU-BUY

OTHER



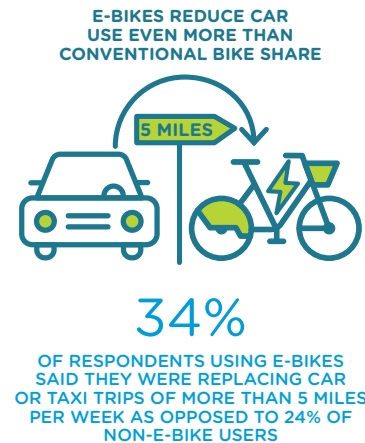
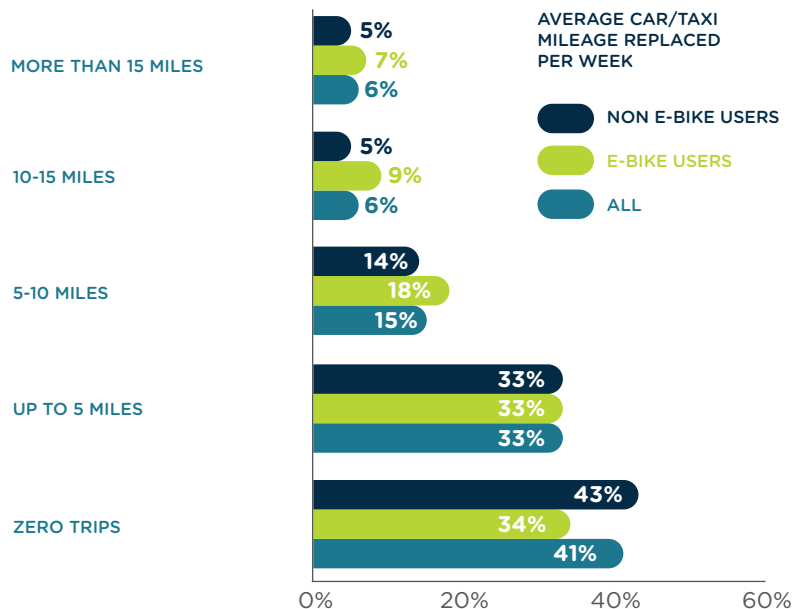
“  
An e-bike helped me in reducing my efforts to cycle and getting around the city seamlessly without sweating.”

The demographics showed that there were no significant age differences between e-bike riders and the whole group, indicating their appeal to all generations.

# Electric bikes and car use

The extent to which people were able to replace car trips was slightly higher for people who used e-bikes in their scheme. 34% of these respondents reported that they were replacing more than 5 miles of car travel per week, compared to 24% of non e-bike users. (Those who chose the 'other' response option were excluded from the calculations in the table.)

Using the same estimation method as described before (i.e. using the mid-points of each range and conservatively assuming that >15 miles may average 17.5 miles per week), the implication is that, on average, e-bike users were replacing 34% more car miles than non e-bike users (with an average of 4.5 miles per week, compared to 3.4 miles for non e-bike users, and 3.7 miles for the sample as a whole).



“As a bicycle rider, I didn't much like the idea of electric bikes. Then I tried one and I loved it. Riding on electric bikes is a lot of fun.”

“The electric bike share has been a great option if I have a migraine, which makes it difficult for me to ride my bike (due to the physical effort required). The electric bike has allowed me to travel places for a lower cost when I just wouldn't have because of my migraines.”

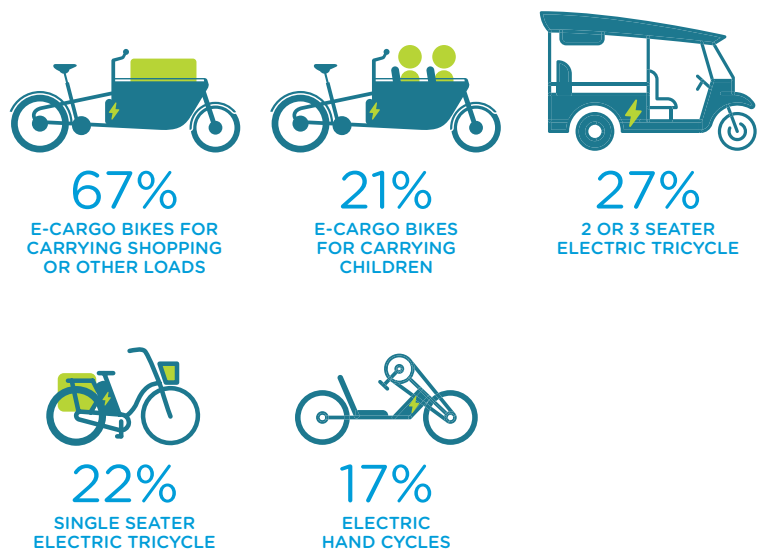




# Specialist and adapted bikes

In the year in which we saw the first cargo bikes added to bike share fleets, we asked people about their interest in specialist and adapted bikes. Just over half (58%) of people indicated that they would be interested in using at least one of the options offered.

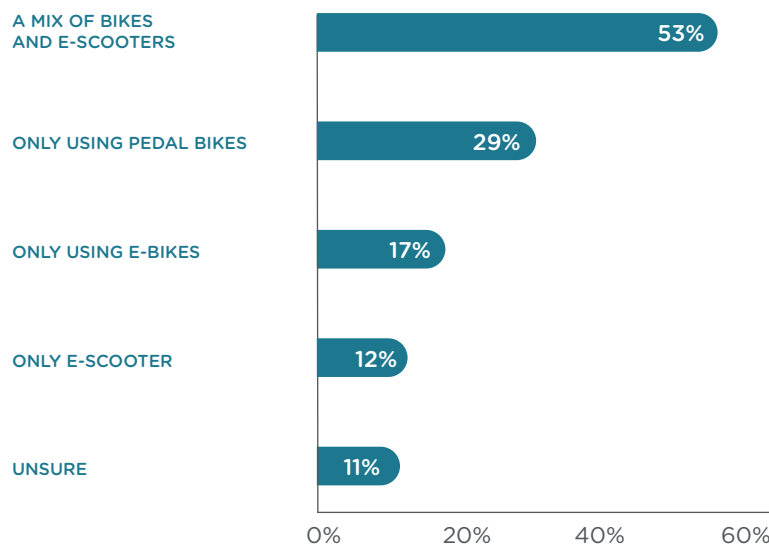
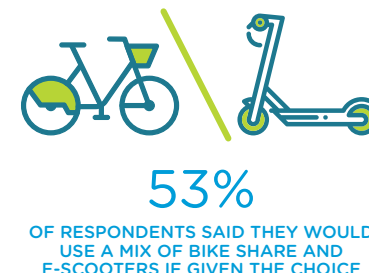
Of these people, 67% supported the introduction of electric cargo bikes for carrying shopping or other loads. 21% showed interest in e-cargo bikes for carrying children and 27% would like to hire a 2 or 3 seater electric tricycle. A further 22% chose electric tricycles and 17% electric hand cycles.



# Bike share and shared e-scooters

Shared (stand up) e-scooter trials were introduced into some UK cities over 2020/21. Respondents were asked which they would choose, if they had the choice of using bike share or e-scooter. 53% opted for using a mix of bikes and e-scooters, which is something which has been seen in other countries depending on factors like the length of the trip.

This figure has increased from 28% in 2020, indicating more people may have had a chance to try using shared e-scooters. Bike share remained popular with 29% opting for only using pedal bikes (17%) or only using e-bikes (12%), although these figures are reduced from the previous year, given the increase in people choosing a mix of modes. 6% opted for an e-scooter only, whilst 11% were unsure.



“It’s easier to get from A to B in the city and cuts down travel time during rush hour too.”

“It helps me get to town quicker without worrying about where to lock my bike or worrying about it being stolen.”

# Customer Satisfaction

There is a significant increase in the proportion saying that they might have used a car, with 53% saying they might have travelled by car (driver or passenger) or taxi in 2021 and 29% in 2020. The difference is likely to reflect a mix of increased popularity of schemes and the reduction of use of public transport due to Covid-19.



“ I got home safer late at night. As a woman on her own late at night in a city, it renders me a bit less vulnerable. ”

“ It has really helped me feel good, mood-wise, in the morning. :- ) ”

“ Absolutely great service has helped me in emergency travelling situations, boosted my exercise and has saved me time for my journeys :- ) ”

“ Has helped with my regular commute to work and my general inability to arrive on time to things! ”

Really get enjoyment out of using them as well and have had some fun using them with friends. ”

“ Helps me get in and out of city fast, much better than waiting for a bus or trying to park a car. ”





#### Acknowledgements

Thanks to Sally Cairns of Sally Cairns Associates for her support with survey design and analysis