

Santander Cycles Customer Satisfaction and Usage Survey

Casual Users Only: Quarter 2 2017/18



Contents

1

Key findings 3

2

Background and objectives 5

3

Satisfaction with Santander Cycles/
likes and dislikes 8

4

Profile of casual users, and comparison
with member profile 22

5

How casual users use Santander Cycles 32

1

Key findings



Summary

- Satisfaction remains high for overall experience (85) and recommendation (90).
- This year sees a decrease in those aware of the membership scheme (from 78% to 70%).
- Ease of use remains the main reason for a positive experience at 38%. Bike availability, and enjoyability are also attractions of the Cycle Hire Scheme, but they are less likely to be mentioned as positives this year.
- The demographic profile of casual users has remained very similar over the past few years: the scheme is primarily used by those who are young, white, male and living in London.
- Over half (56%) are aware of the app, which is a slight improvement on last wave's 54%.
- Speed continues to be the main reason (38%) for making this journey using a Santander Cycle. Convenience and enjoyability were also key reasons for choosing Santander Cycles to make this journey, but enjoyability was less likely to be mentioned this wave than it was last wave.

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.

Interviewing for 2017/18 comprised 83 shifts at Central zone docking stations, 15 in the Eastern zone and 23 in the Western Zone between 25th June and 12th August 2017.

A total of 604 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: 23%
- Respondent had just **docked** a bike: 77%

Number of interviews:

	Target	Achieved (unweighted)	Achieved (weighted)
Central Zone	511	483	435
Eastern Zone	84	61	70
Western Zone	105	60	99
Total	700	604	604

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

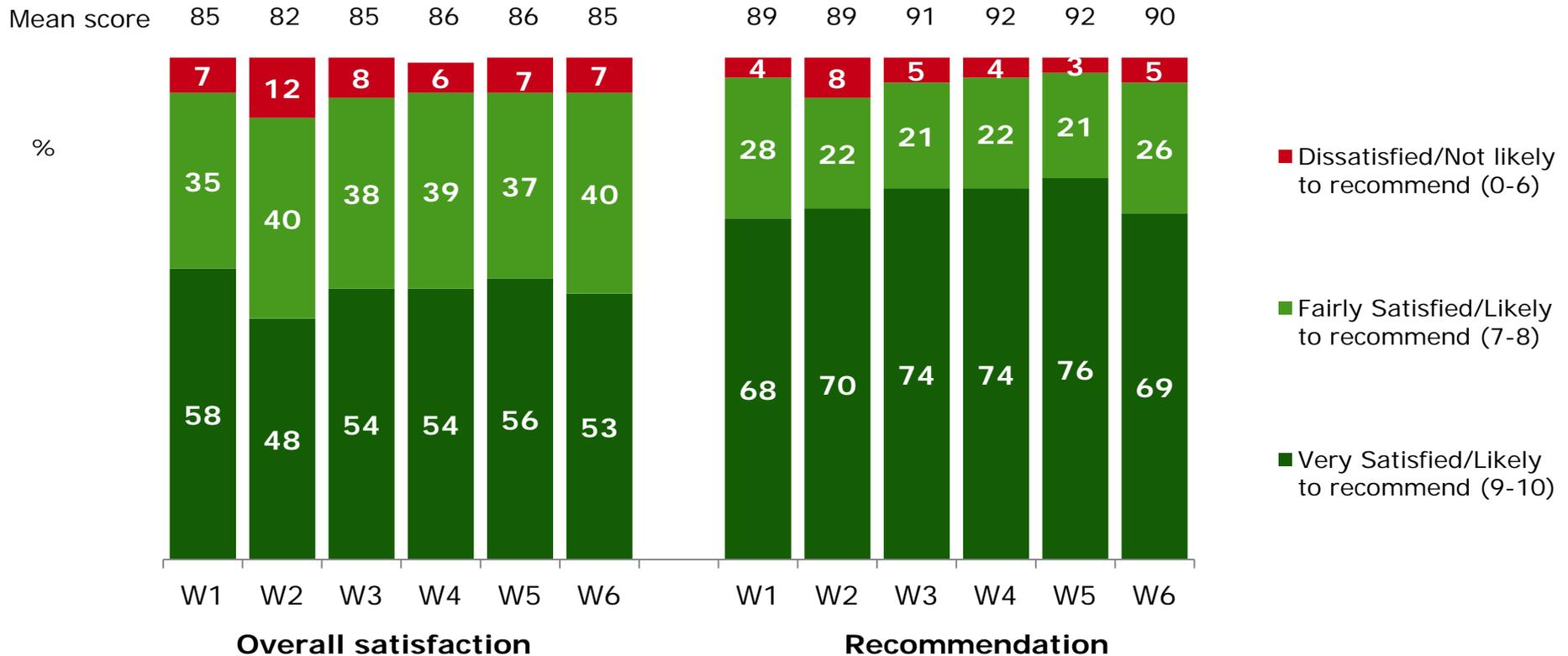
		Weight
Central Zone	Busy (600+ dockings in the month)	54.75%
	Average (300-599 dockings in the month)	14.96%
	Quiet (<300 dockings in the month)	2.98%
Eastern Zone	Busy (600+ dockings in the month)	6.27%
	Average (300-599 dockings in the month)	3.86%
	Quiet (<300 dockings in the month)	1.57%
Western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



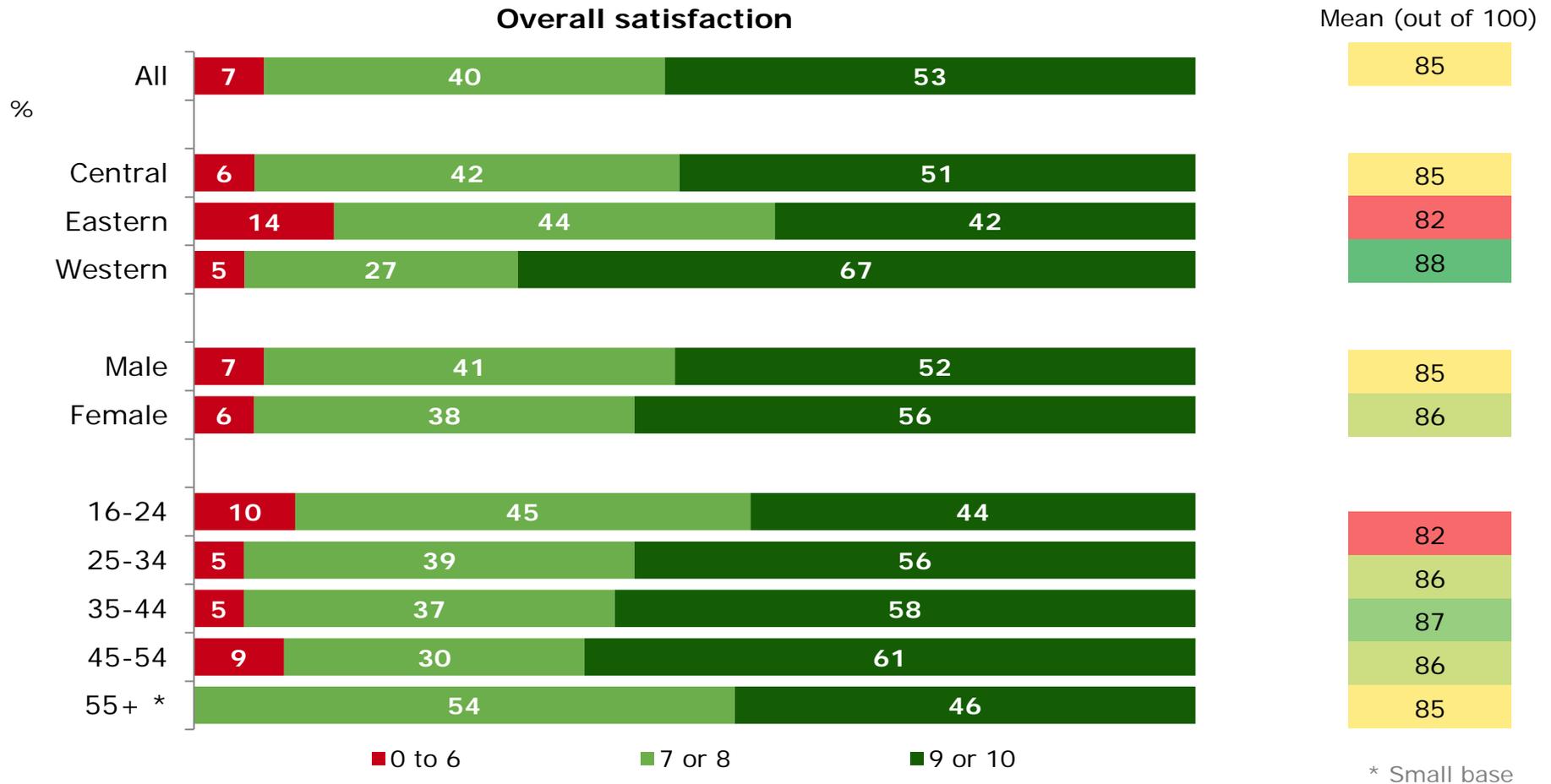
Overall satisfaction (85) and recommendation (90) have decreased slightly this wave but remain high.



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; W5: 1021; W6: 604 ©TNS



Eastern zone users and 16-24s are less satisfied than other groups.



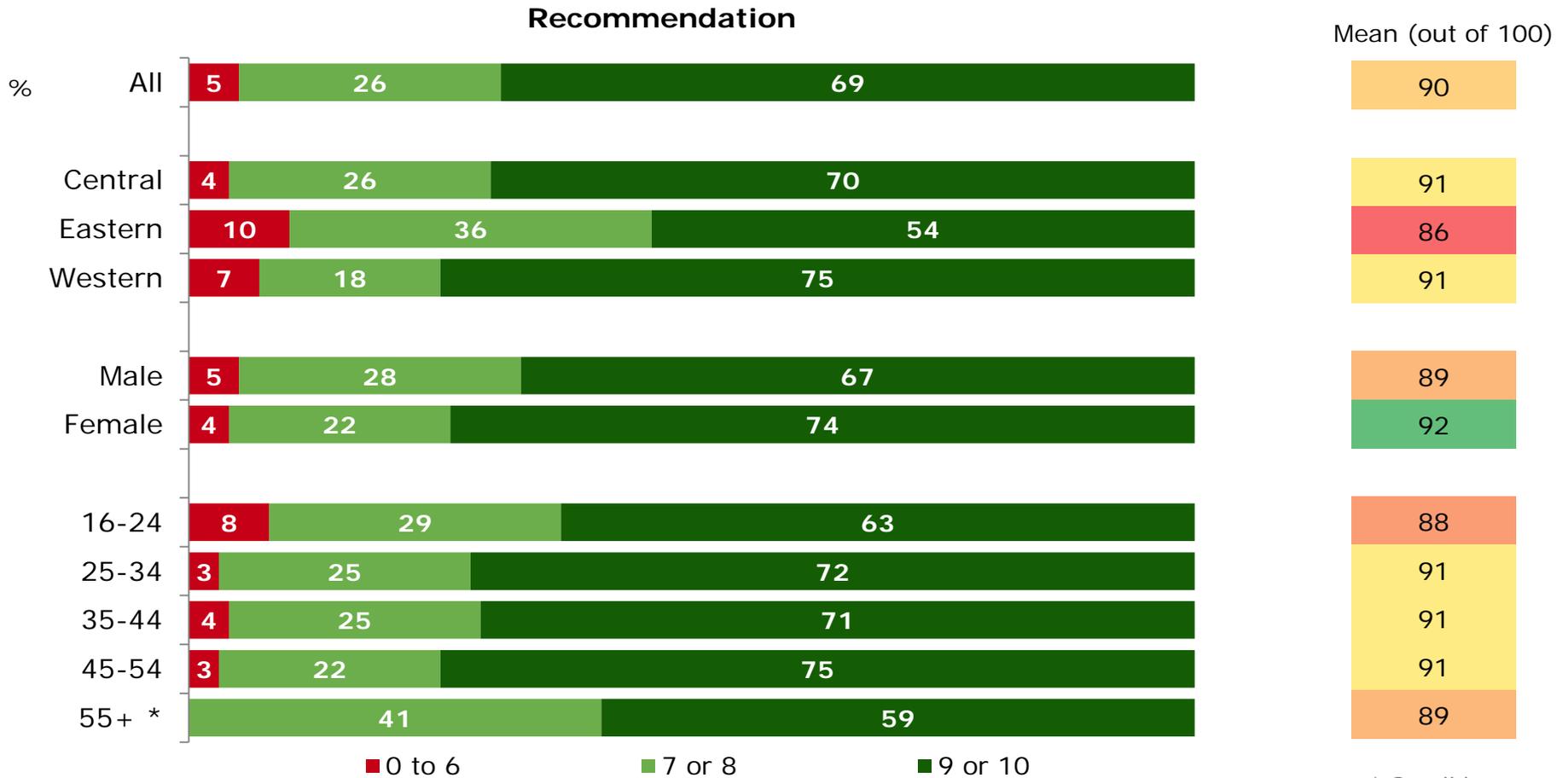
Q12. Taking everything into account, how satisfied are you with your overall experience of Santander Cycles today?

Base: Casual users W6: All:604; Central: 483; Eastern: 61; Western: 60; Male: 424; Female: 180; 16-24: 196; 25-34: 245; 35-44: 90; 45-54: 60; 55+: 13*

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In line with satisfaction, Eastern zone users and 16-24s are also less likely to recommend.



* Small base

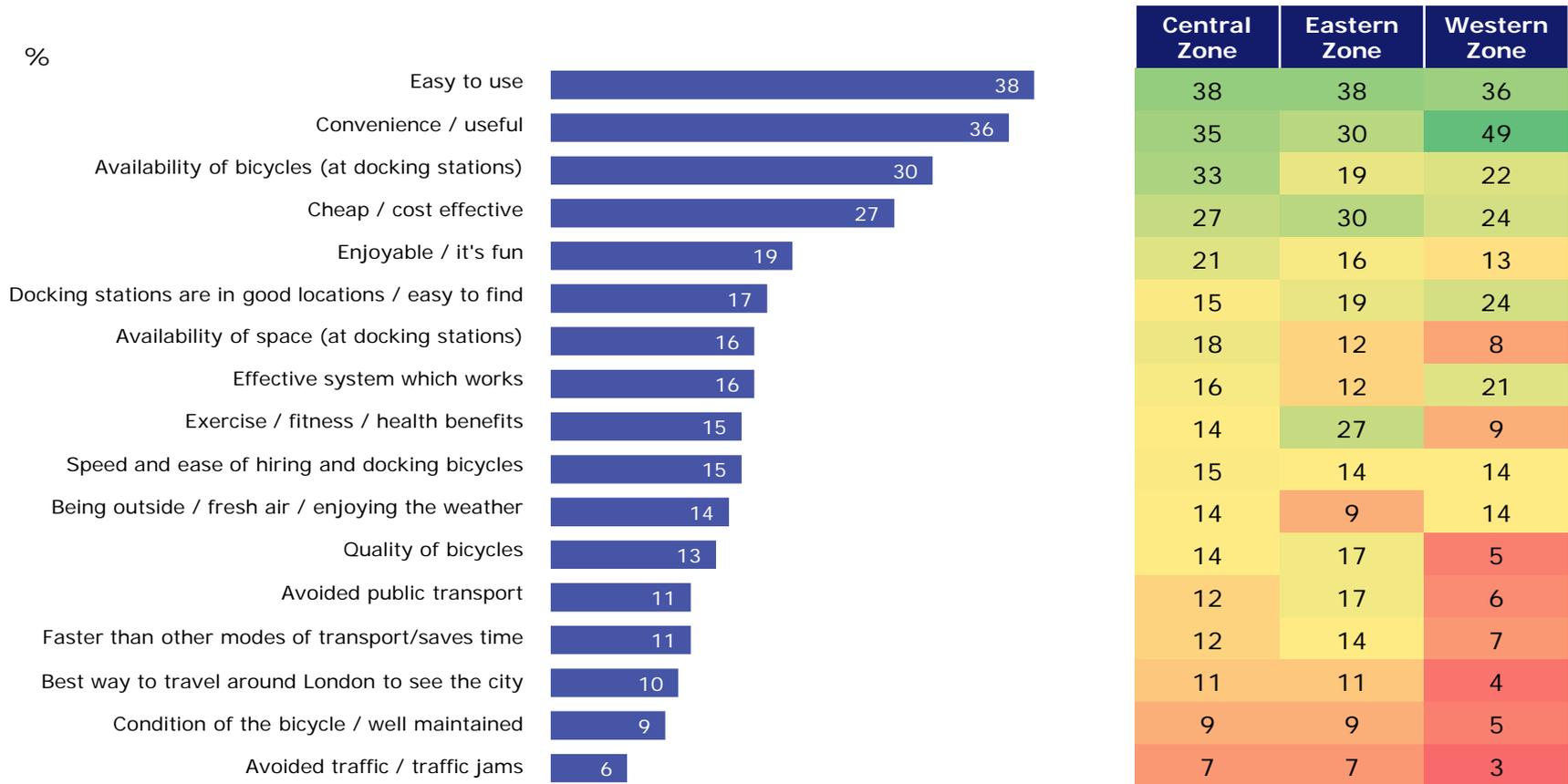
Q13. How likely would you be to recommend Santander Cycles to friends or family?

Base: Casual users W6: All:604; Central: 483; Eastern: 61; Western: 60; Male: 424; Female: 180; 16-24: 196; 25-34: 245; 35-44: 90; 45-54: 60; 55+: 13*

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Ease of use is still the main attraction, followed by convenience and bike availability. Western zone users are the least positive about ease of use, but most positive about convenience and usefulness.

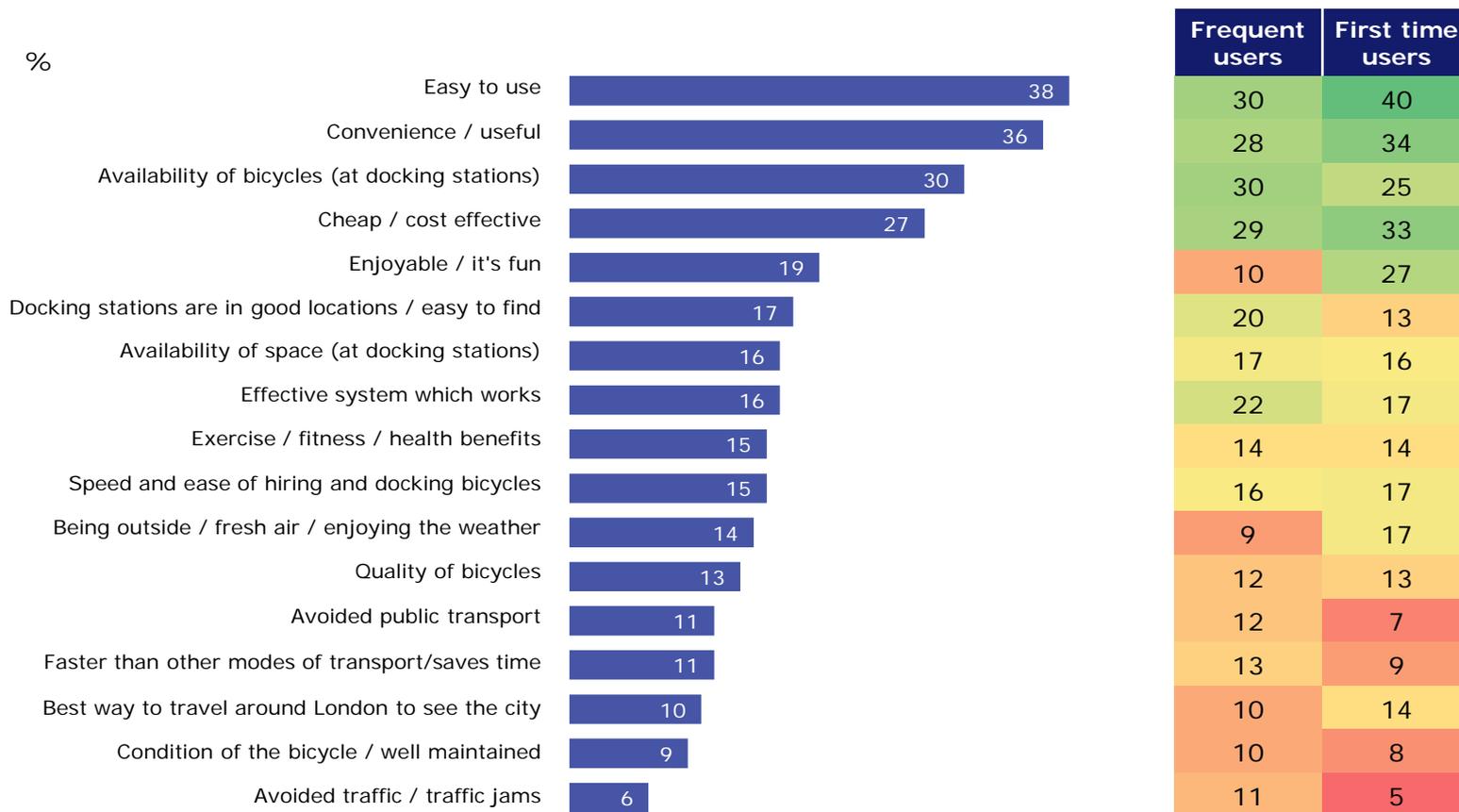


Q14. Thinking about your experience of using Santander Cycles, what was particularly good about your experience?

Base: Casual users W6: All:604; Central: 483; Eastern: 61; Western: 60



First time users are more positive about ease of use, convenience and enjoyment, whereas frequent users value the bike availability and the effectiveness of the system.

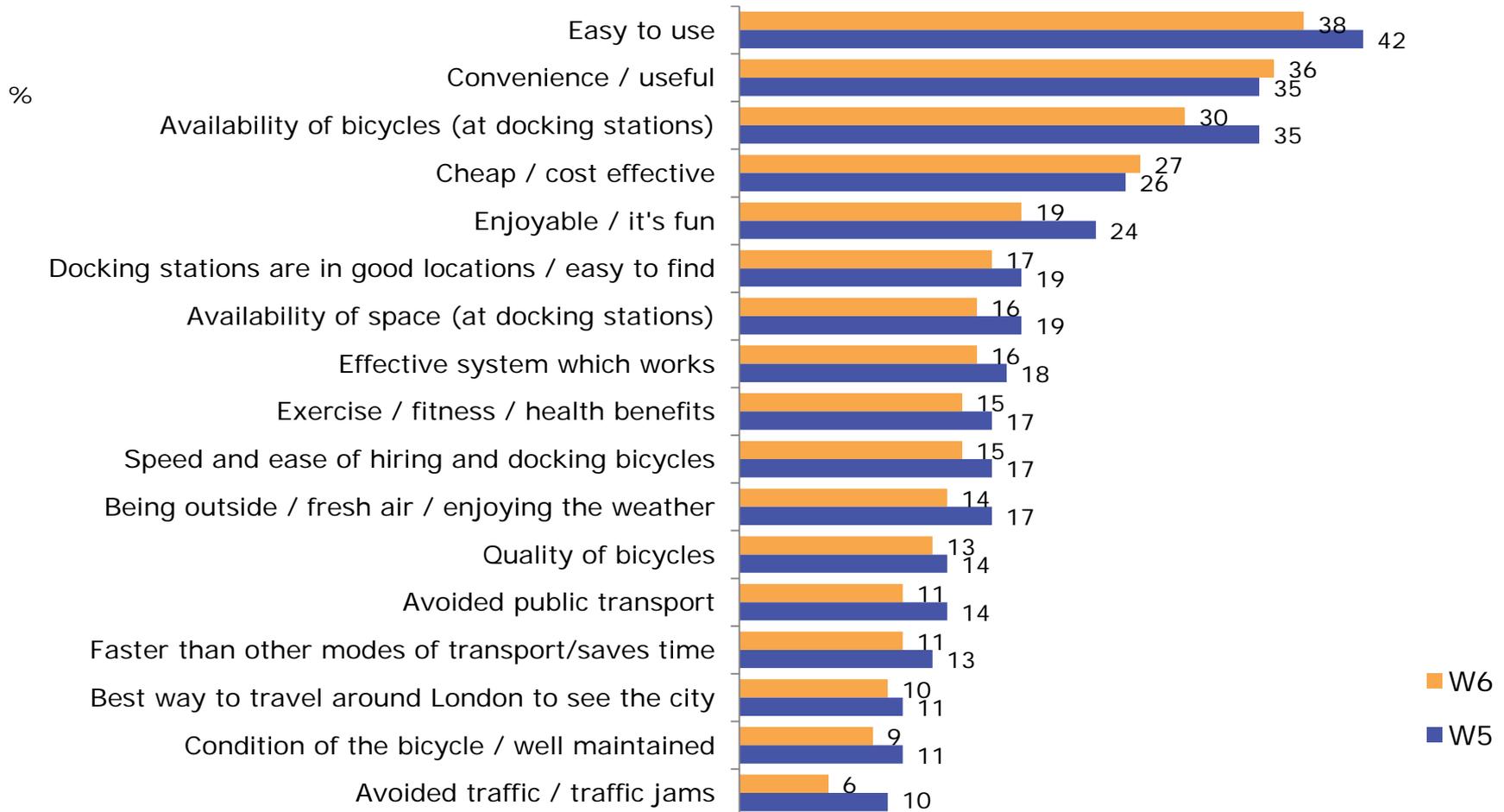


Q14. Thinking about your experience of using Santander Cycles, what was particularly good about your experience?

Base: W6: All: 604, Frequent users (3-5 days a week): 119; First time users: 133



Ease of use and convenience remain key to the experience. Positivity around bike availability has softened this wave.



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

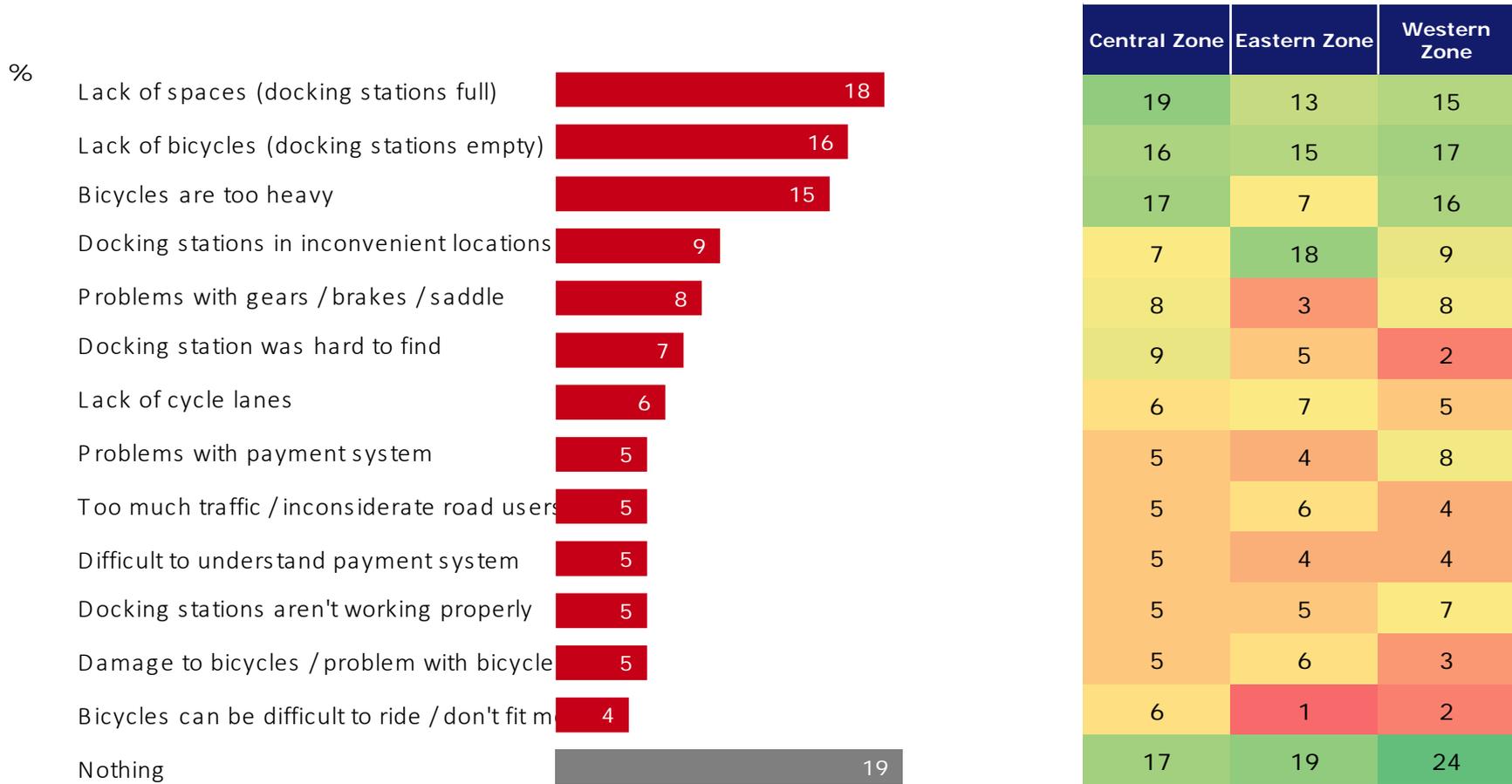
Base: All casual users: W5 1021, W6 604

Mentions above 5% in W6 are shown

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The main concerns are lack of bikes and spaces at docking stations. Central zone users raised more issues, particularly lack of spaces (19% compared to 13-15% elsewhere). Eastern zone users also mentioned the inconvenience of docking stations more.

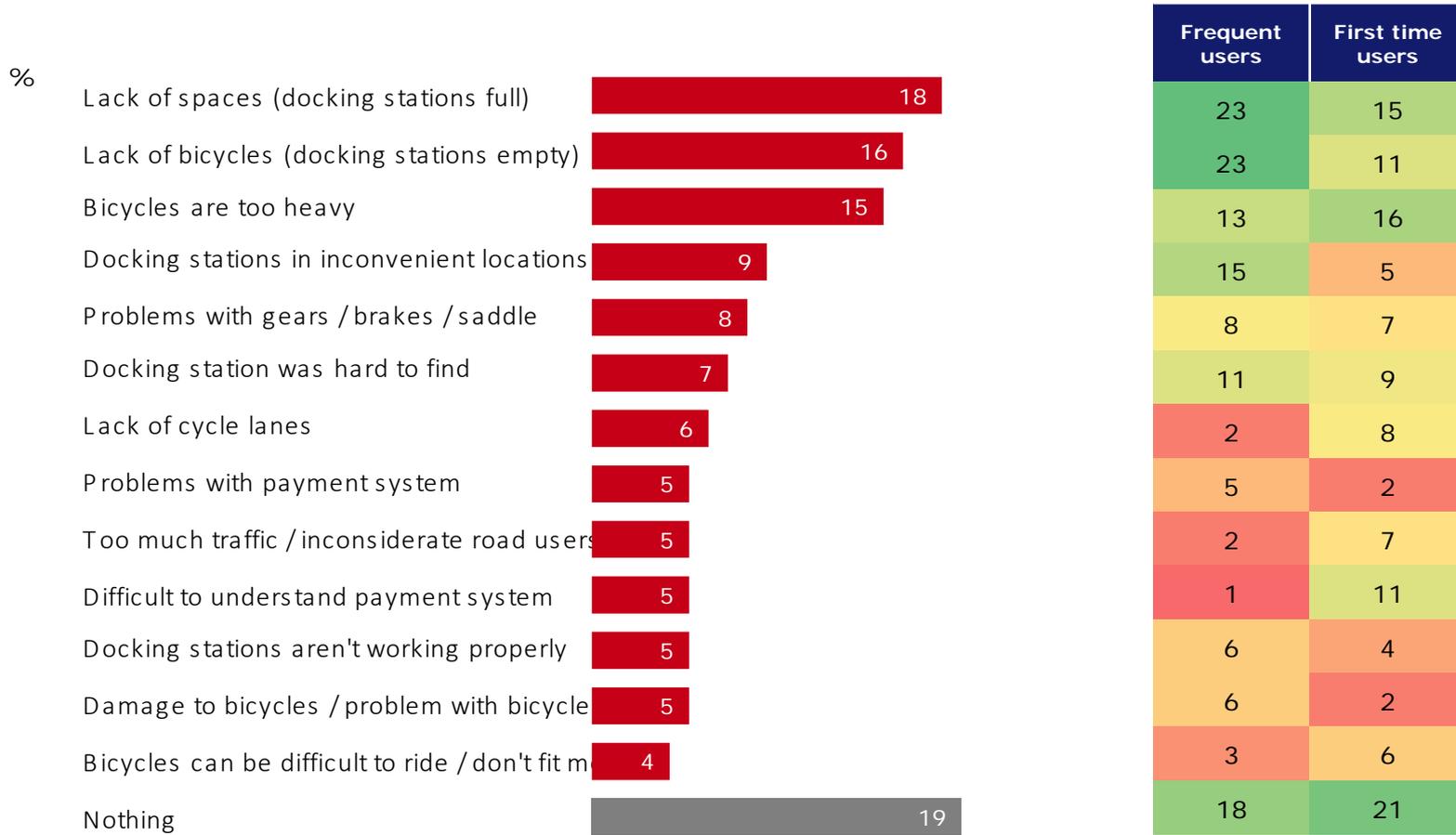


Q15. Thinking about your experience of using Santander Cycles, what was particularly bad about your experience?

Base: W6: All 604, Central: 483; Eastern: 61; Western: 60



First timers are slightly less likely to raise concerns (21% had none compared to 18% of frequent users). Frequent users are more concerned about lack of bikes and spaces and the inconvenient location of docking stations.

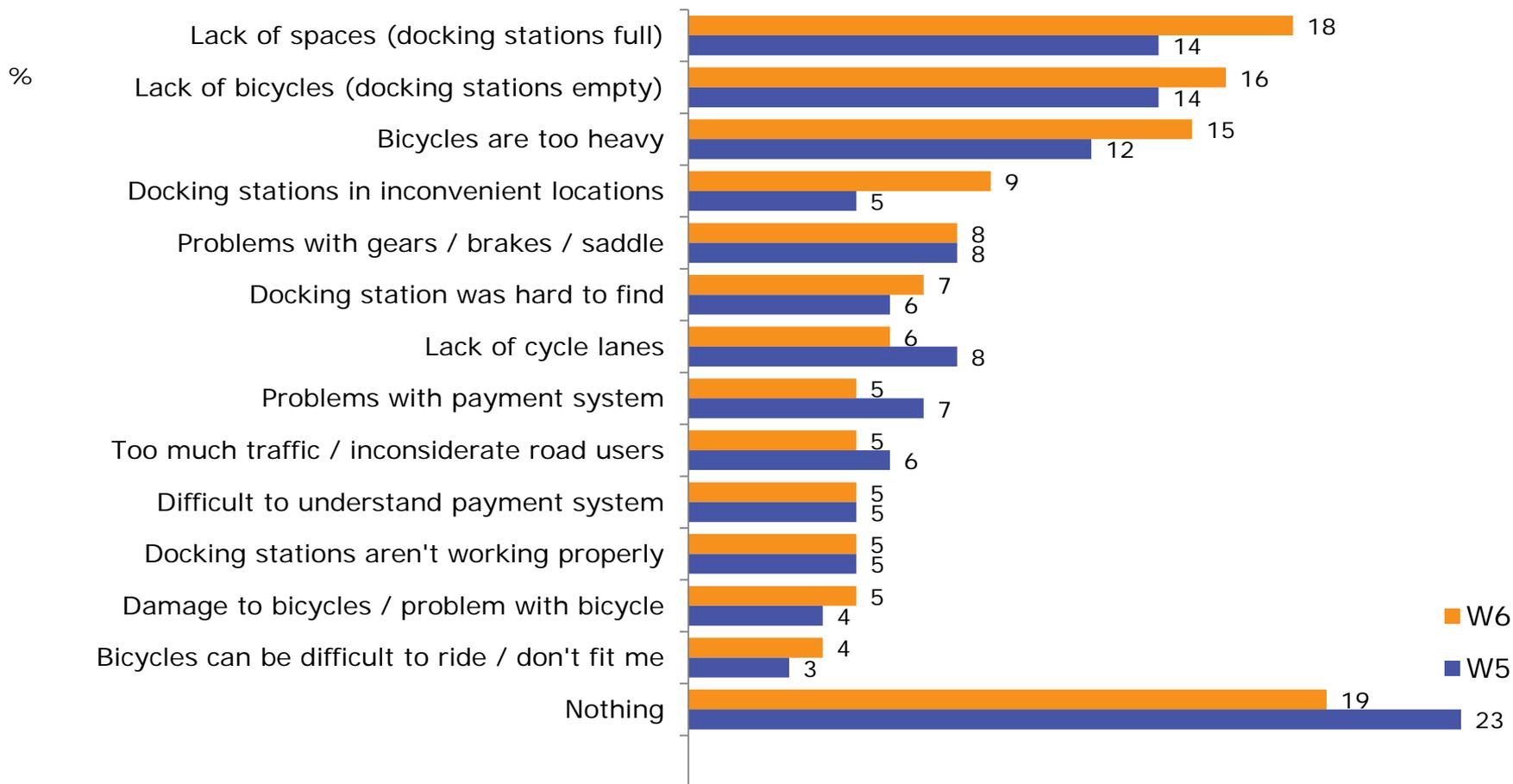


Q15. Thinking about your experience of using Santander Cycles, what was particularly bad about your experience?

Base: W6: All: 604, Frequent users (3-5 days a week): 119; First time users: 133



Concerns around full or empty stations are stronger versus the previous wave.



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

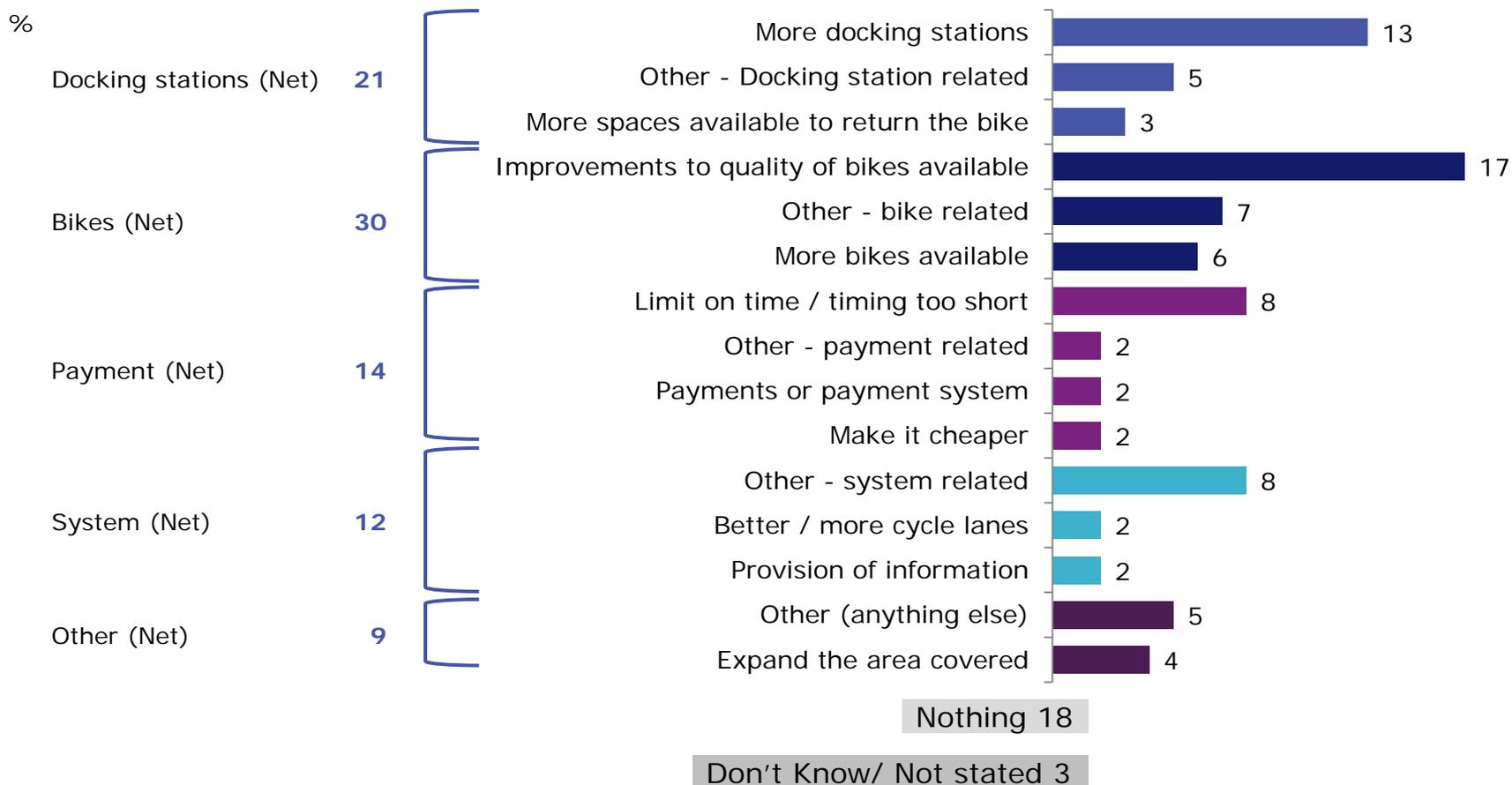
Base: All casual users: W5 1021, W6 604

Mentions above 4% in W6 are shown

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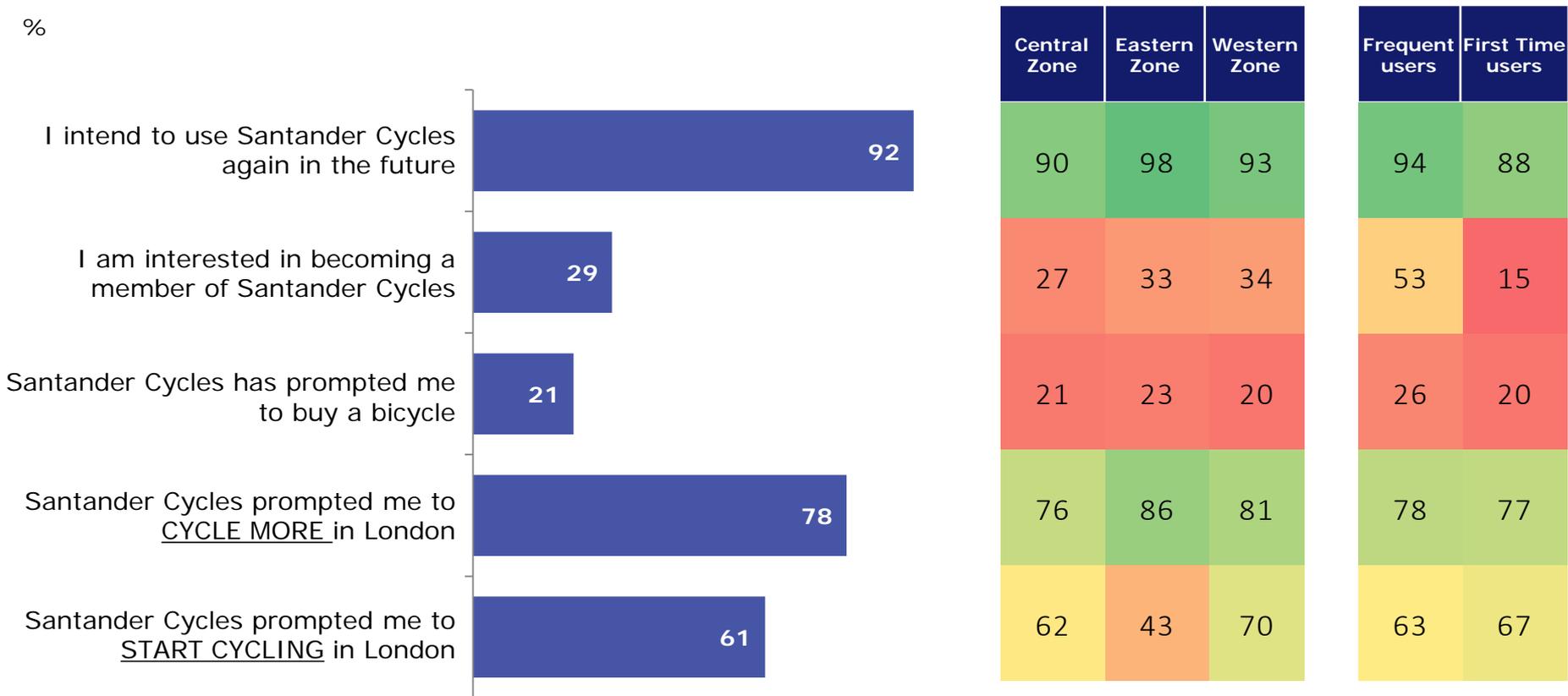
The quality of the bikes and number of docking stations are the main suggested improvements.



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

Base: Casual users W6: All 604

Almost intend to use Santander Cycles again and almost 8 in 10 say it has encouraged them to cycle more in London. Just over half of frequent users express interest in membership.



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

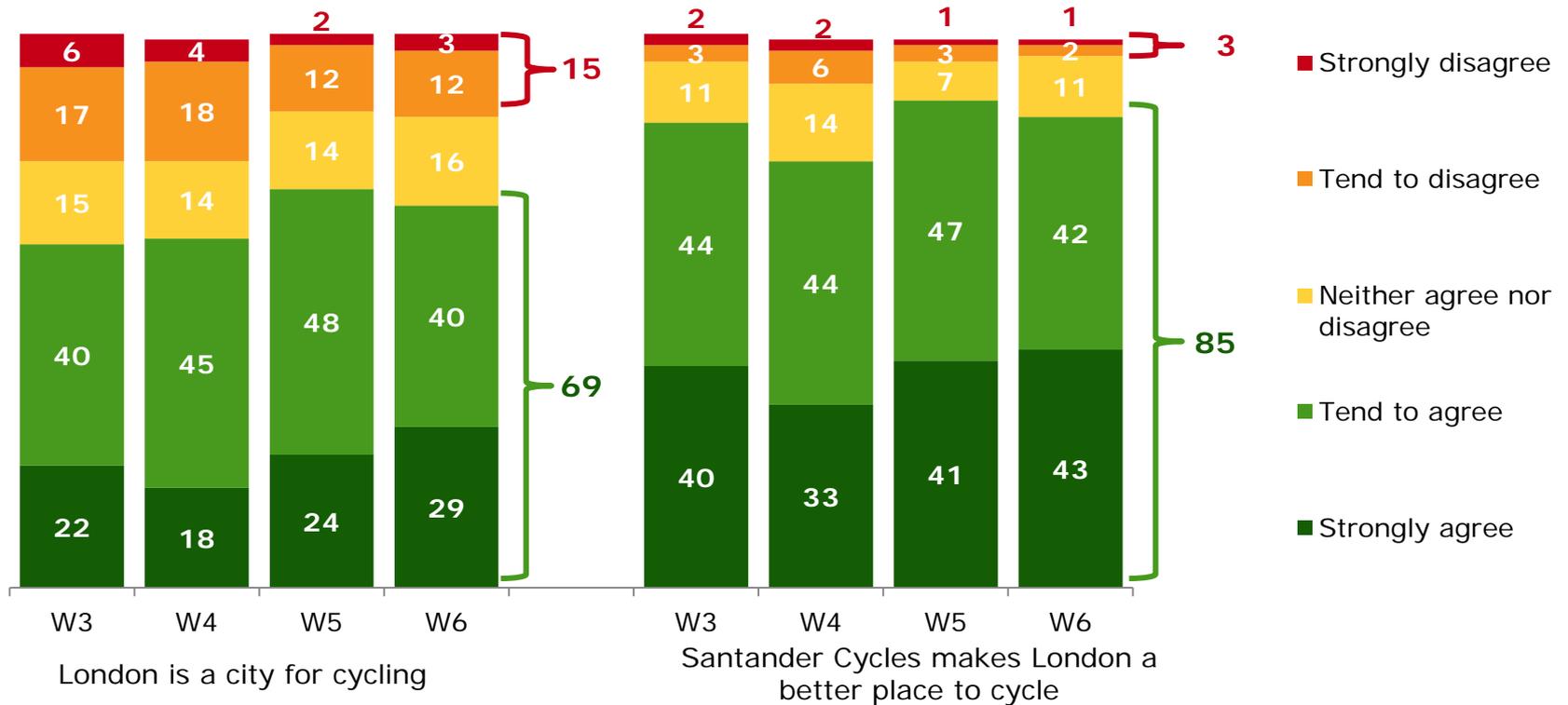
Base: Casual users W6: All 604, Central: 483; Eastern: 61; Western: 60; Frequent users (3-5 days a week): 119; First time users: 133

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This wave sees a slight decrease in those agreeing London is a city for cycling (from 72% to 69%) and Santander Cycles makes London a better place to cycle (from 88% to 85%).

%

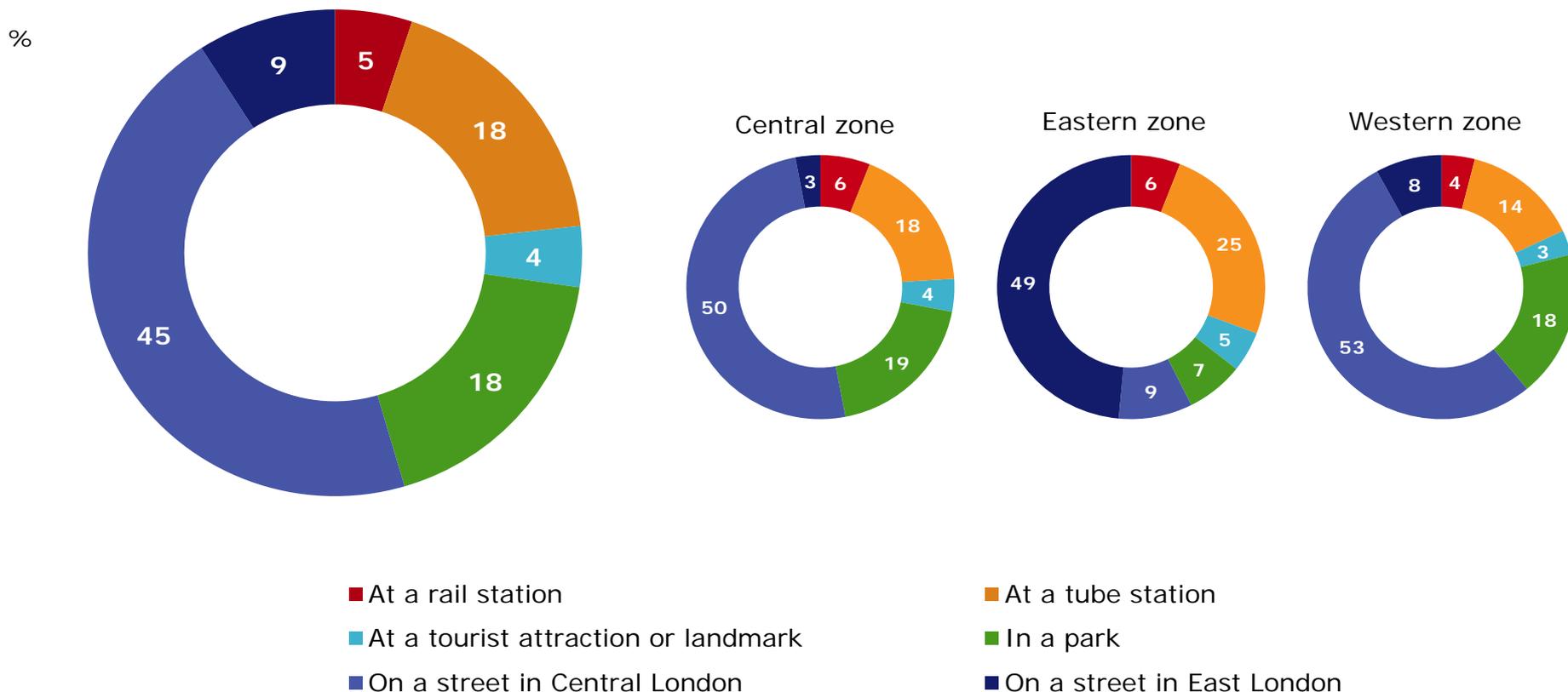


Q20.To what extent do you agree with the following statements?

Base: Casual users W3: All 1179; W4: All 1051; W5: All 1021; W6: All 604



More than four in ten docking stations used by respondents are 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 W6: All 604, Central: 483; Eastern: 61; Western: 60

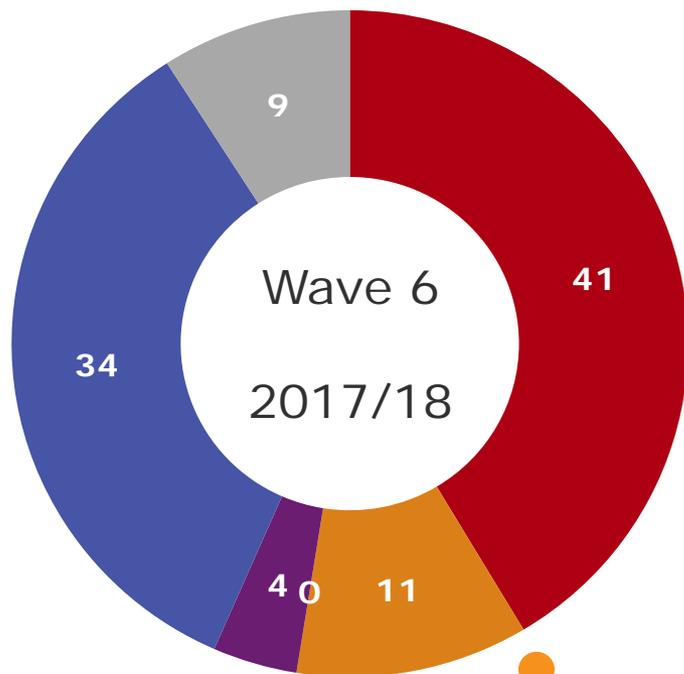
4

Profile of casual users, and comparison with member profile



Of those approached, 49% identified themselves as members rather than casuals (34% said they had an online account, 11% said they own a membership key and another 4% had the app). All these members were excluded from the survey, leaving 41% who qualified for the survey as casuals (and paid by credit/debit card).

%



11% own a membership key

- Credit/debit card
- Used a membership key
- Have a membership key but not using it today
- Used Santander Cycles app
- Online Members
- Refusals
- Have downloaded the Santander Cycles app but didn't use it today

Last wave (%)
49
10
1
3
32
5
0



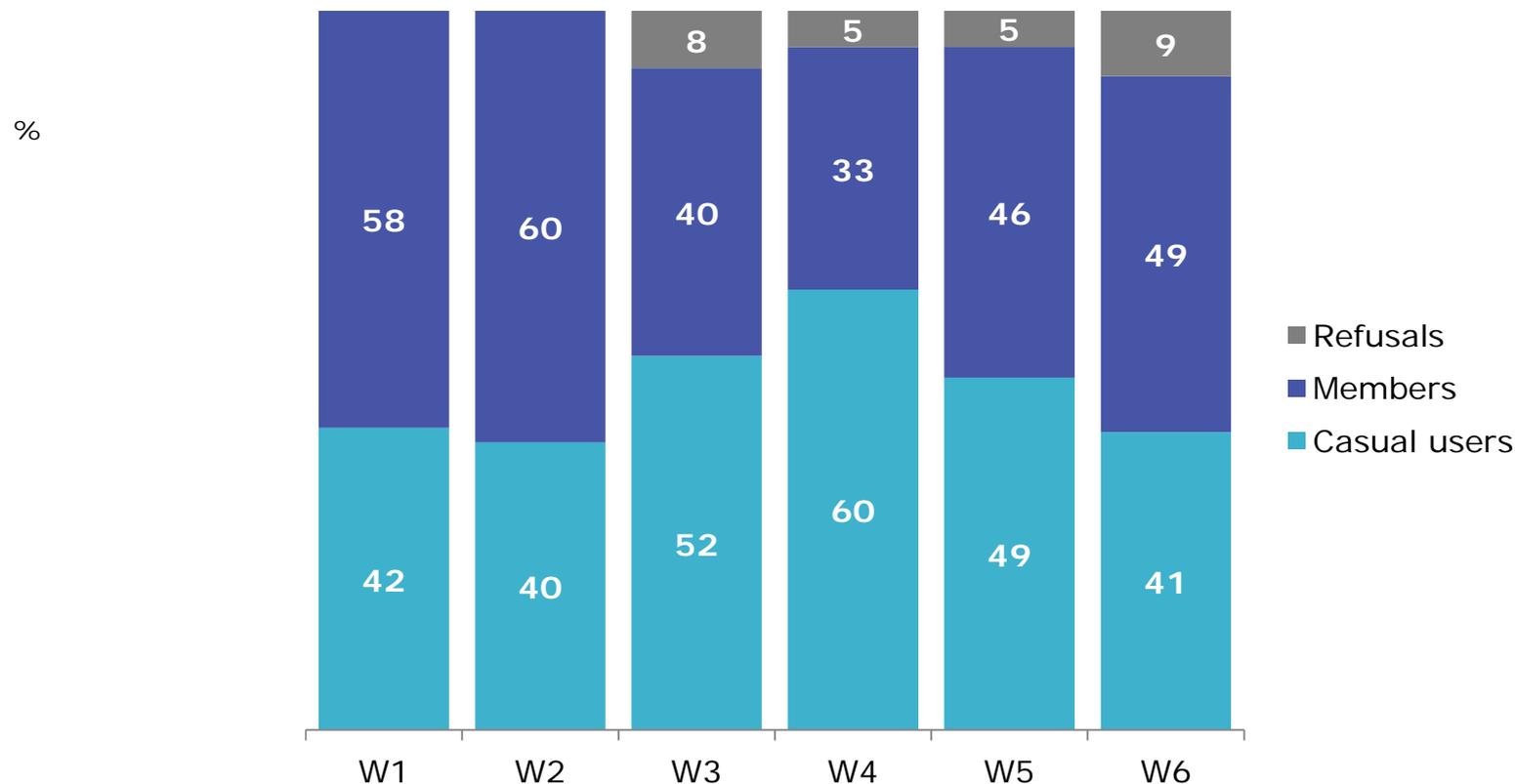
Q1. Can I just check how you paid to use Santander Cycles today? Did you use a membership key, the Santander Cycles app or a credit / debit card?

Base: W6: All those approached - 2072

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Compared to last wave, the proportion of casuals has decreased from 49% to 41%.



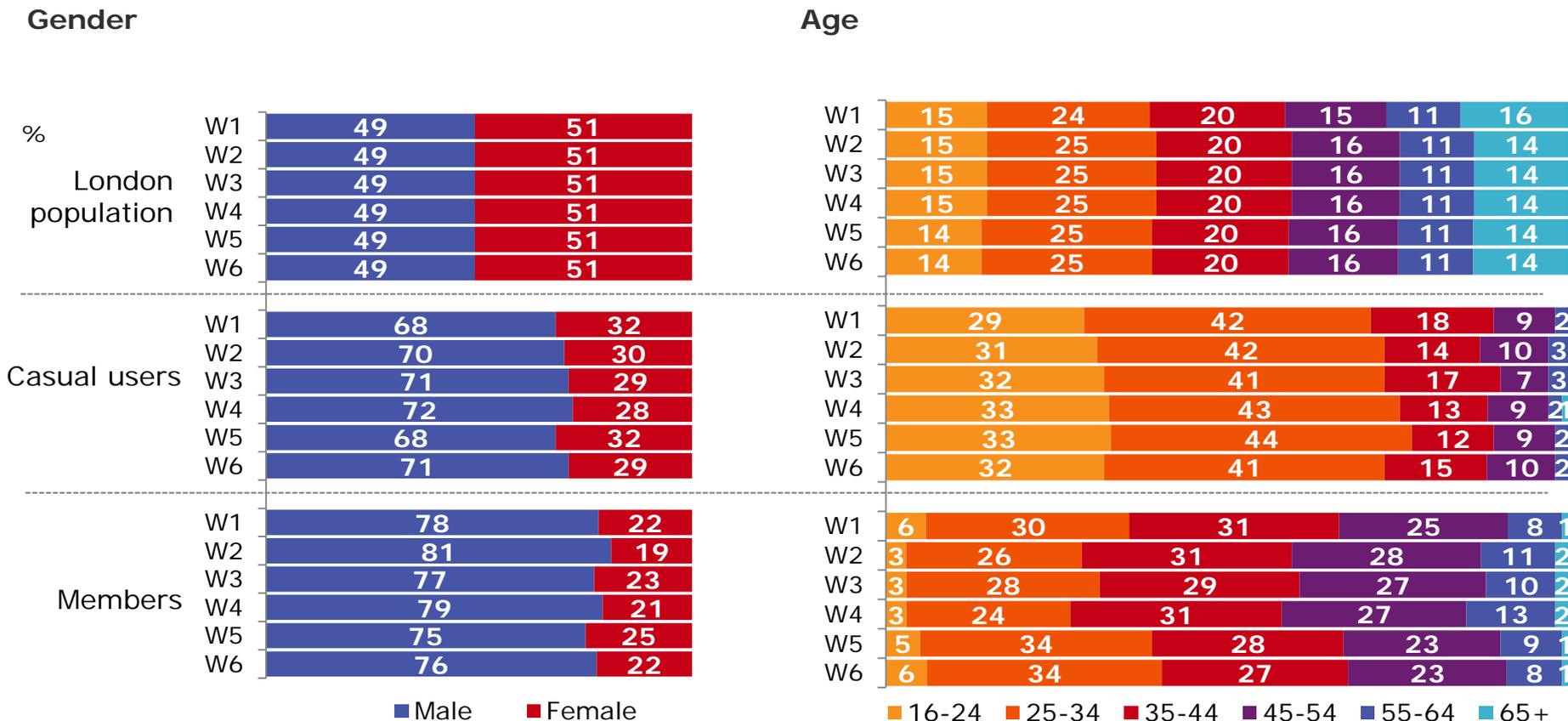
Base: W1, counts based on about half the fieldwork. W2 counts based on all fieldwork recorded manually on paper. W3 counts were included in the survey script.

W4: 2239; W5: 2769

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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 14% of the population and only 6% of members.

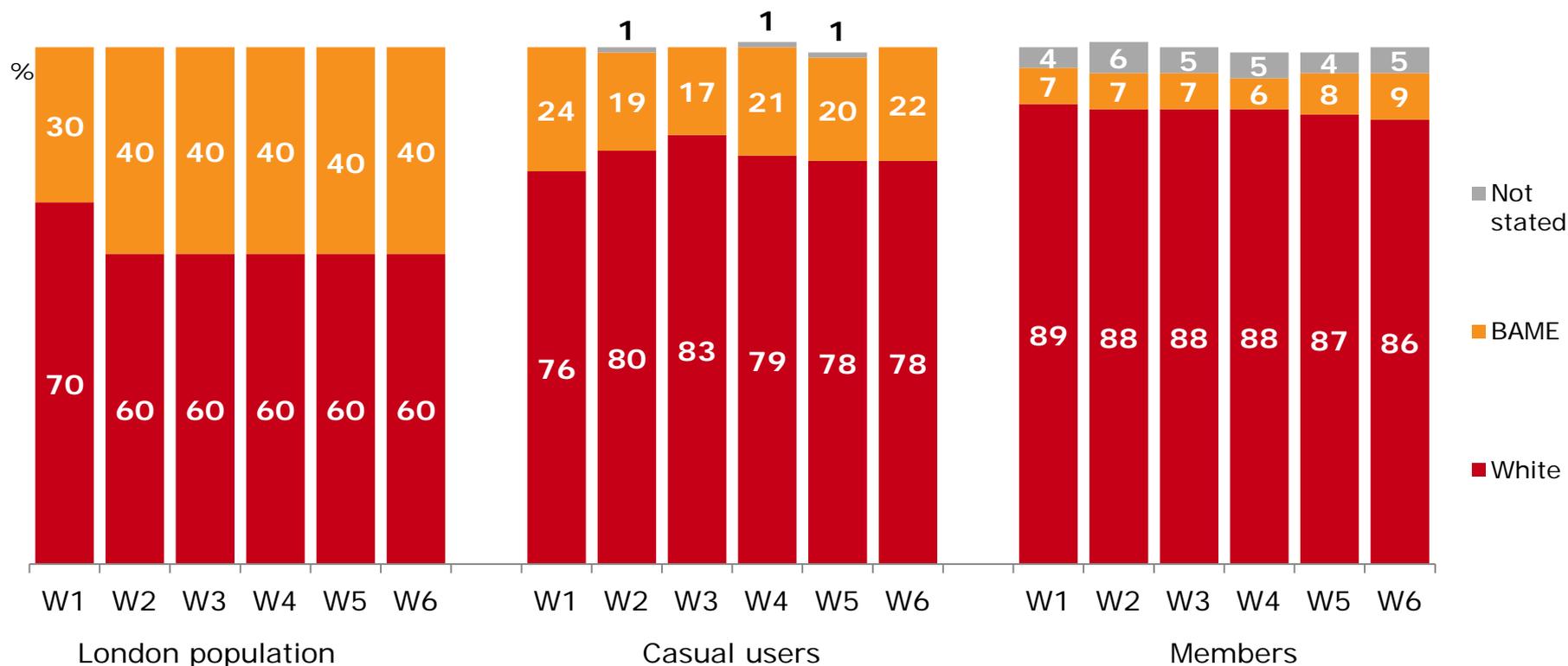


Q30. Interview: code respondent's gender / QK1 Gender. Are you...?
 Q3.And which of these age categories do you fall into? / S2.How old are you?

Base: Casual users W1: 1111; W2 1109; W3 1179; W4: 1051; W5: 1021; W6: 604. Members W1: 4789; W2: 371; W3: 2998; W4: 2935; W5: 2266; W6: 2641 London population Source 2011 census.



Compared to the general London population, BAME continue to be under-represented, particularly among members.

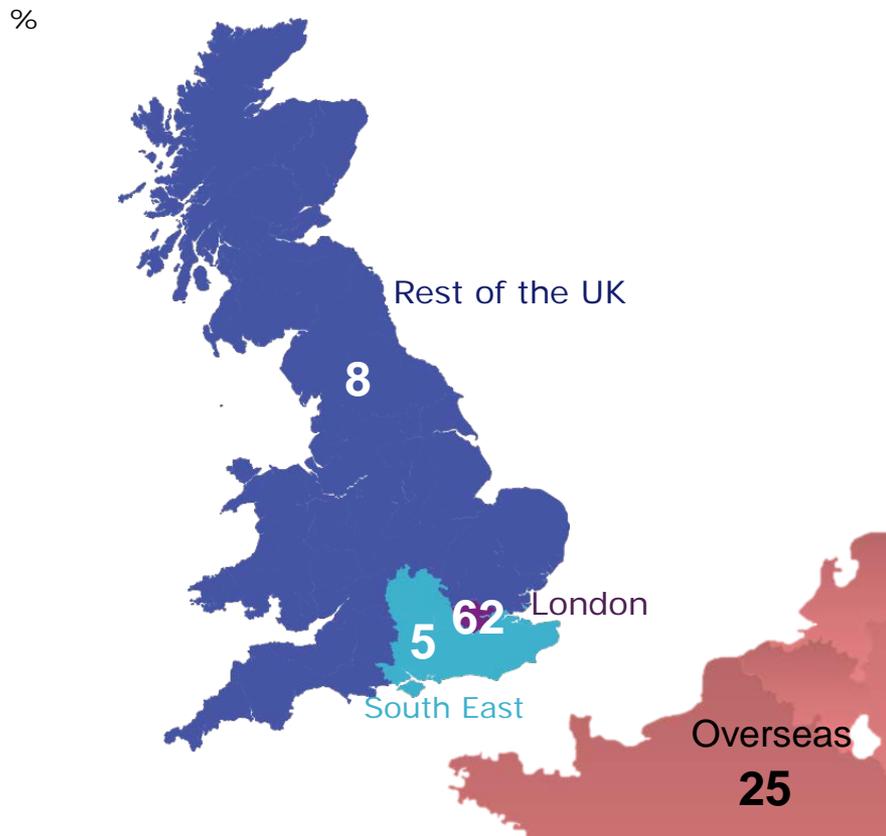


Q25.How would you describe your ethnicity? / QK3 And are you...?

Base: Casual users W1: 1111; W2 1109; W3 1179; W4 1051; W5 1021; W6: 604. Members W1: 4789; W2: 3717; W3: 2998; W4: 2935; W5: 2266; W6: 2642 London population Source 2011 census.



Just under two thirds of casual users are London residents, and a quarter live overseas. Of the overseas users, Australia is most commonly mentioned, followed by France, Germany and the USA.



Country*	%
Australia	11
France	9
Germany	9
USA	9
Brazil	5
Canada	5
Netherlands	5
Spain	4
Other	43

* All quoted by more than 3% of overseas respondents

Q4. Where do you live? Q34 Which country do you normally live in?

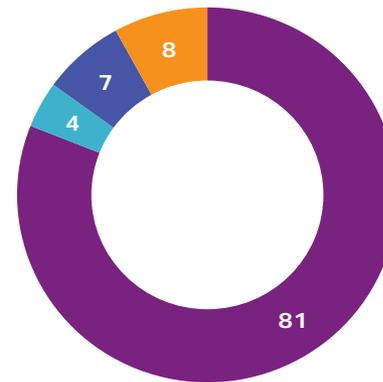
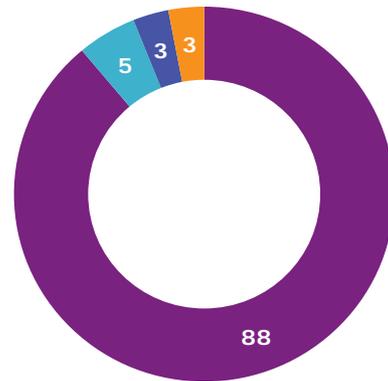
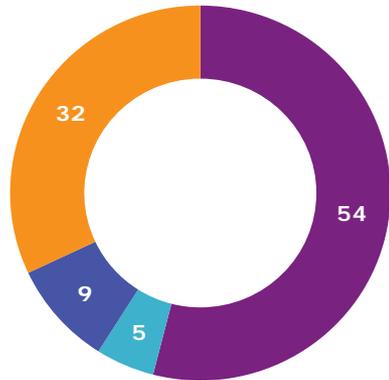
Base W5: Casual users: All 604; Overseas resident: 152

The Central zone has the most overseas users (39%), consistent with last wave. However, there are fewer overseas users in both the Eastern and Western zones this wave (3%, down from 6% and 8% down from 13% respectively).

Central zone

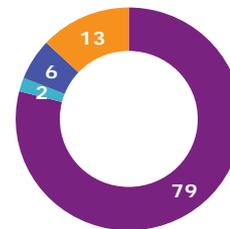
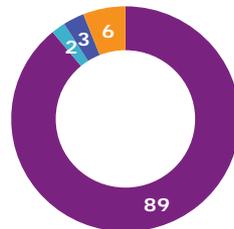
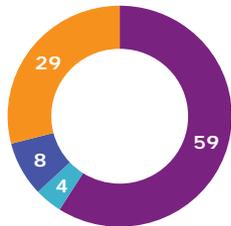
Eastern zone

Western zone



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

W5

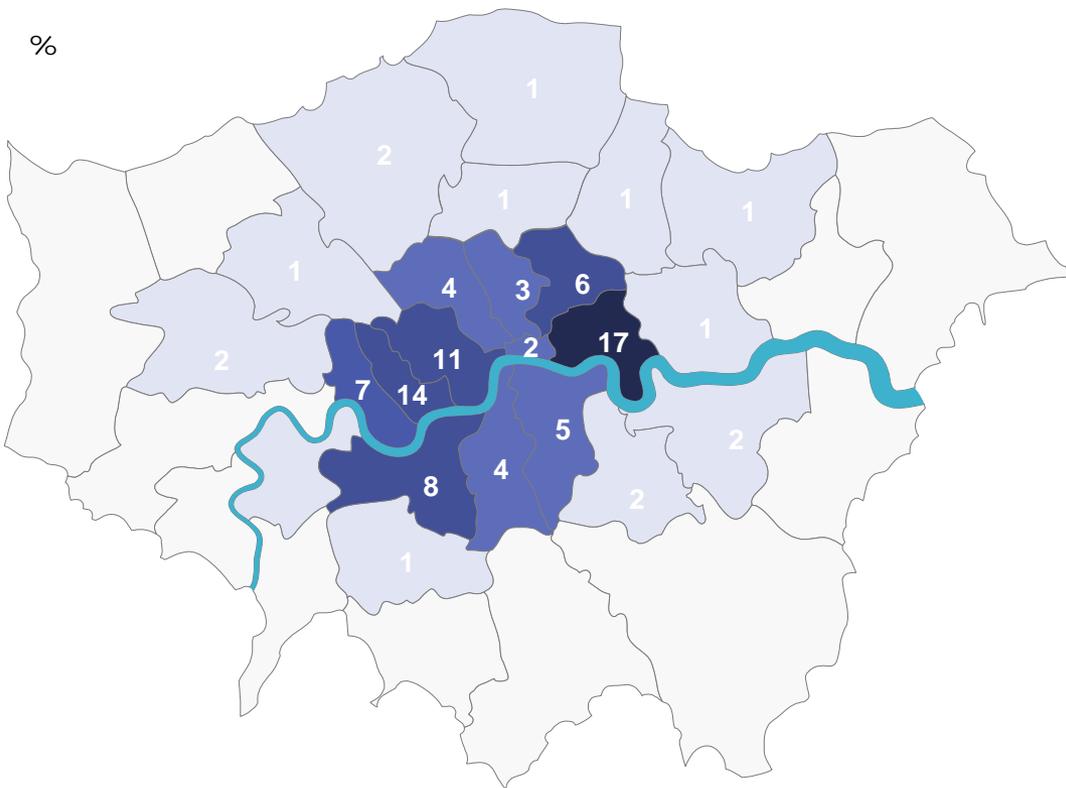


Q4. Where do you live?

Base: Casual users W6: All 604; Central: 483; Eastern: 61; Western: 60

Those living in London mainly reside centrally. Tower Hamlets, Kensington & Chelsea and Westminster remain the most represented boroughs.

%



Less than 1%

Borough	% residents W1	% residents W2	% residents W3	% residents W4	% residents W5	% residents W6
Tower Hamlets	19	18	16	14	15	17
Kensington and Chelsea	6	9	13	15	13	14
City of Westminster	14	12	11	8	11	11
Wandsworth	2	3	8	9	7	8
Hammersmith and Fulham	1	4	8	7	6	7
Hackney	7	7	8	5	8	6
Southwark	10	9	5	7	4	5
Lambeth	6	7	7	5	5	4
Camden	7	6	4	5	5	4
Islington	3	6	7	7	5	3
City of London	3	3	2	2	5	2
Barnet	1	1	1	1	2	2
Greenwich	2	1	1	1	2	2
Ealing	1	1	1	2	1	2
Lewisham	2	1	1	1	1	2
Newham	1	2	1	3	1	1
Haringey	2	2	0	0	1	1
Waltham Forest	1	0	0	1	1	1
Brent	2	1	1	2	0	1
Merton	0	1	0	1	0	1
Richmond-upon-Thames	1	1	0	1	2	0
Bromley	1	0	0	0	1	0
Harrow	1	0	0	0	1	0
Croydon	1	1	0	1	0	0
Hounslow	0	1	0	0	0	0

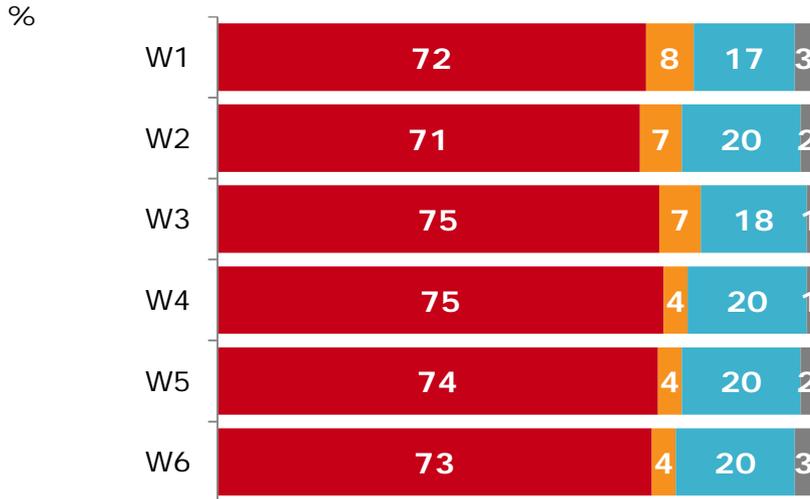
Q5. In which borough do you live?

Base: Casual users living in London: W1: 728; W2: 694; W3: 794; W4: 678; W5: 680; W6: 358



There are more full time workers among members and more students among casuals – consistent with previous waves.

Casual users



Members



■ Full time ■ Part time ■ Student ■ Other

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

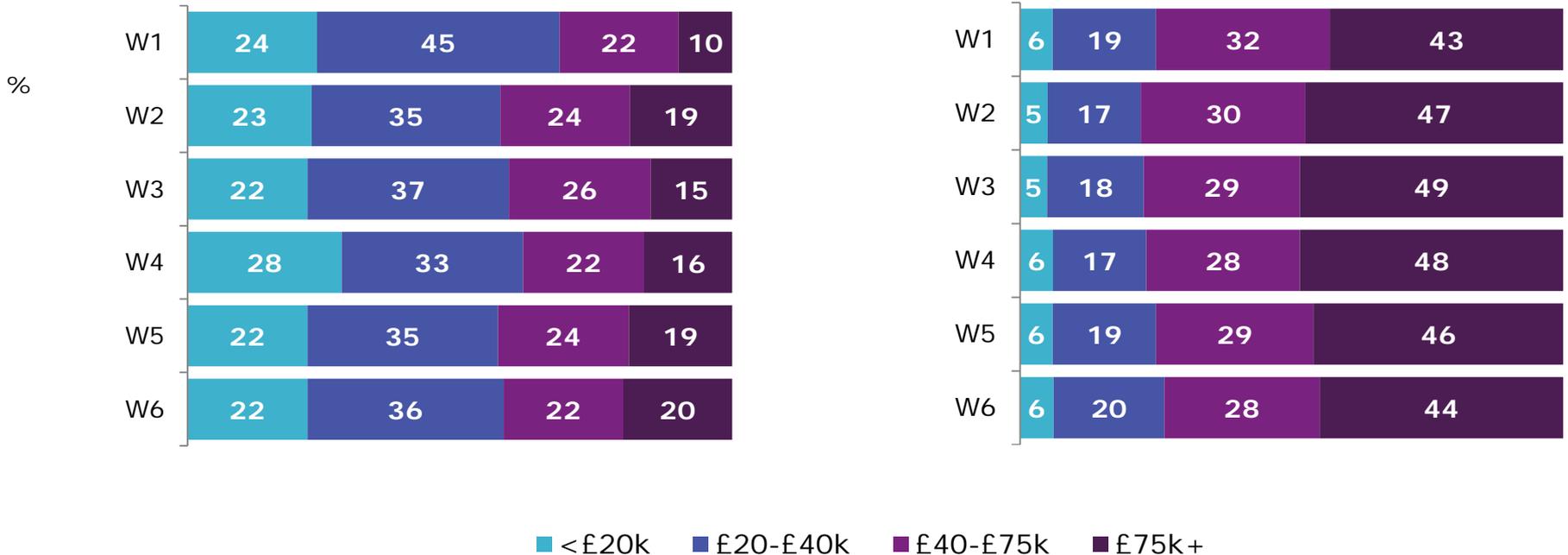
Base: Casual users W1: 1111; W2 1109; W3 1179; W4 1051; W5 1021; W6: 604. Members W1: 4789; W2: 3717; W3: 2998; W4: 2935; W5: 2266; W6: 2642



Casual users generally have lower incomes than members; over a fifth have a household income of less than £20k, compared to just 6% of members.

Casual users

Members



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; W5: 689; W6: 416.
Members W1:2164; W2: 2907; W3: 2410; W4: 2339; W5: 1813, W6: 2178

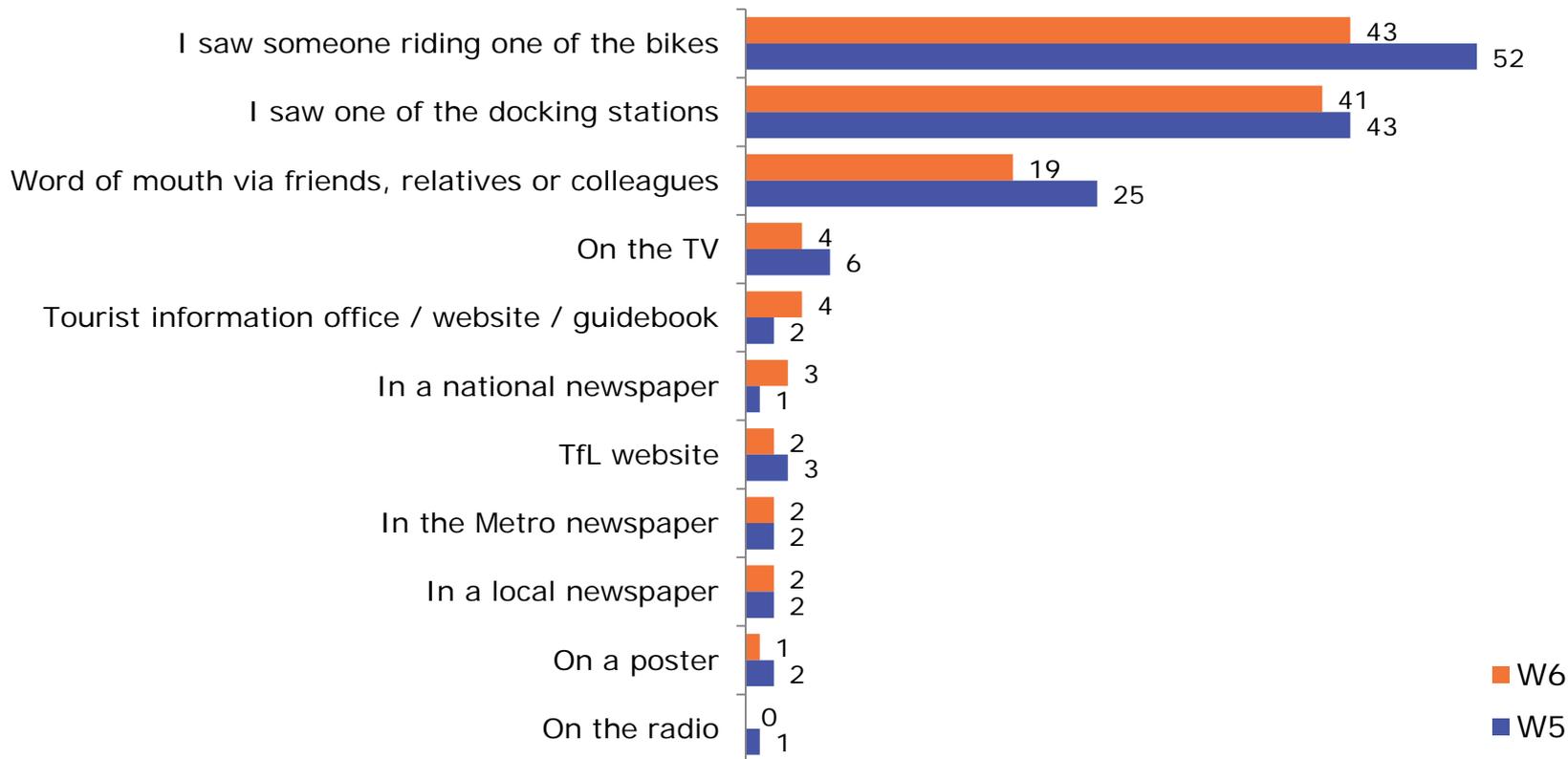


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How casual users use Santander Cycles

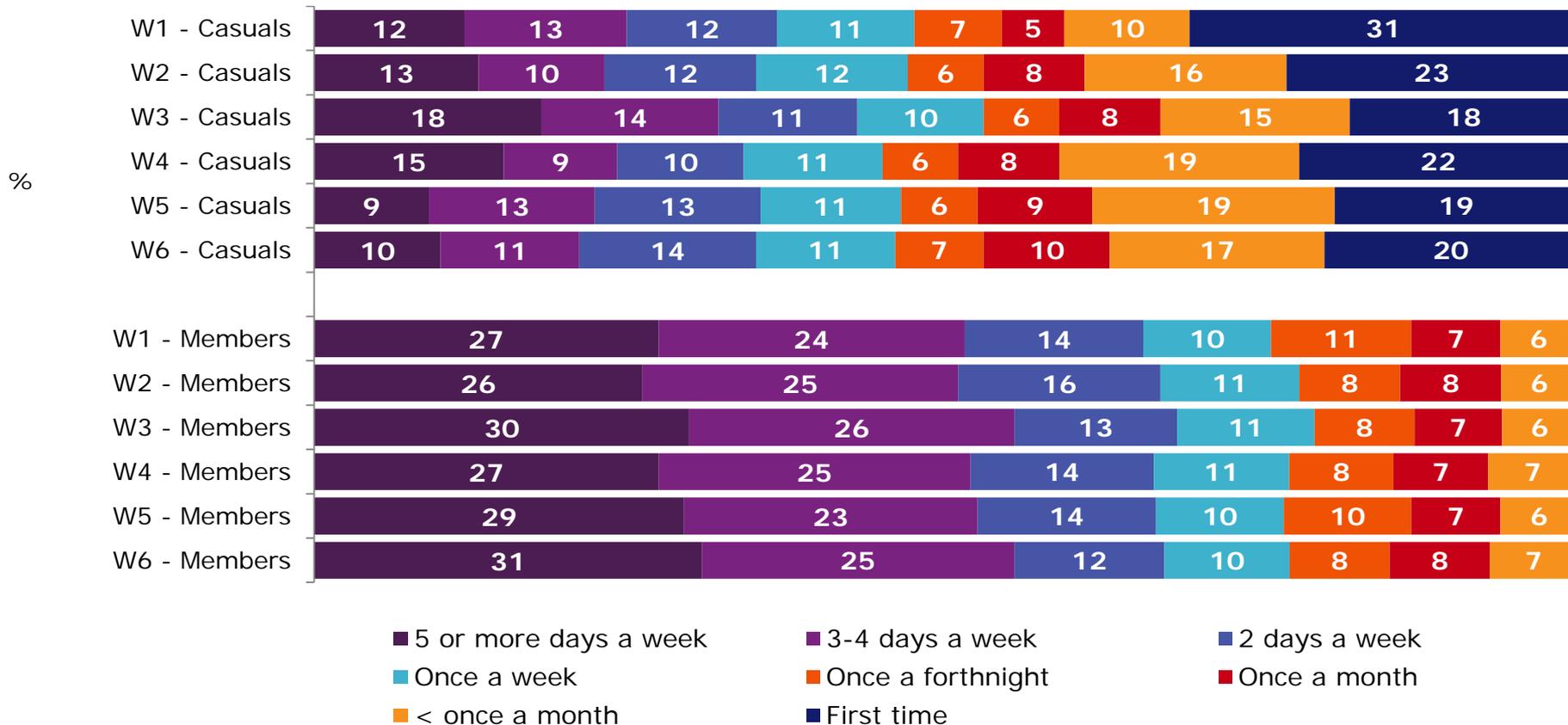


Most ways of hearing about the scheme are down this wave. Seeing somebody riding one of the bikes is down to 43% from 52%, representing the largest decrease in how they heard about the scheme.



Q22. How did you first hear about the Santander Cycles scheme?
 Base: Casual users W5: 1021; W6: 604

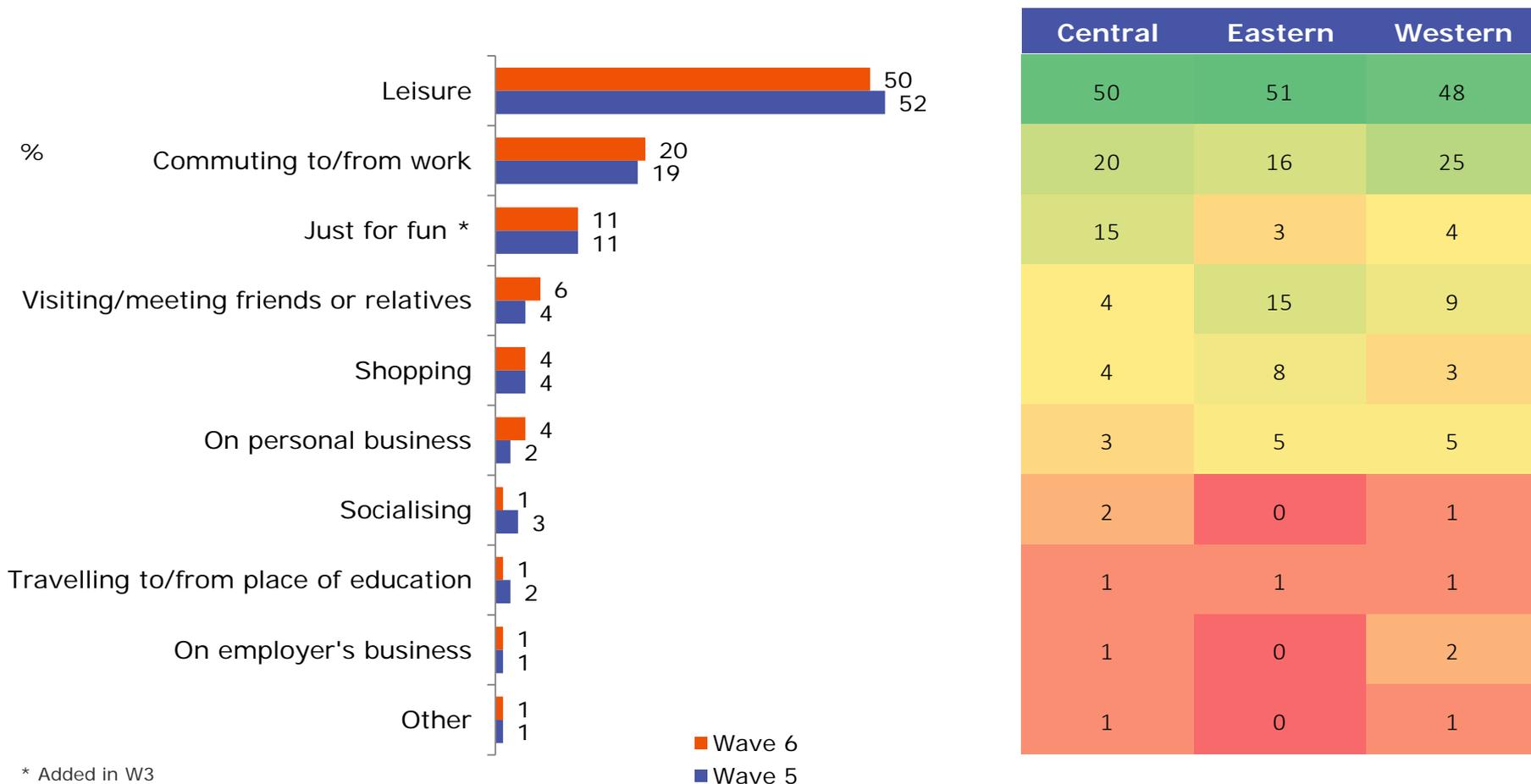
There was very little change from previous waves in frequency of use.



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; W5: 1021 members W1: 4789; W2: 3717; W3: 2998; W4: 2801; W5: 2266 ©TNS



Leisure remains the main reason for using Santander Cycles. Riding just for fun is relatively high in the Central zone (15%, compared to 4% or less elsewhere).

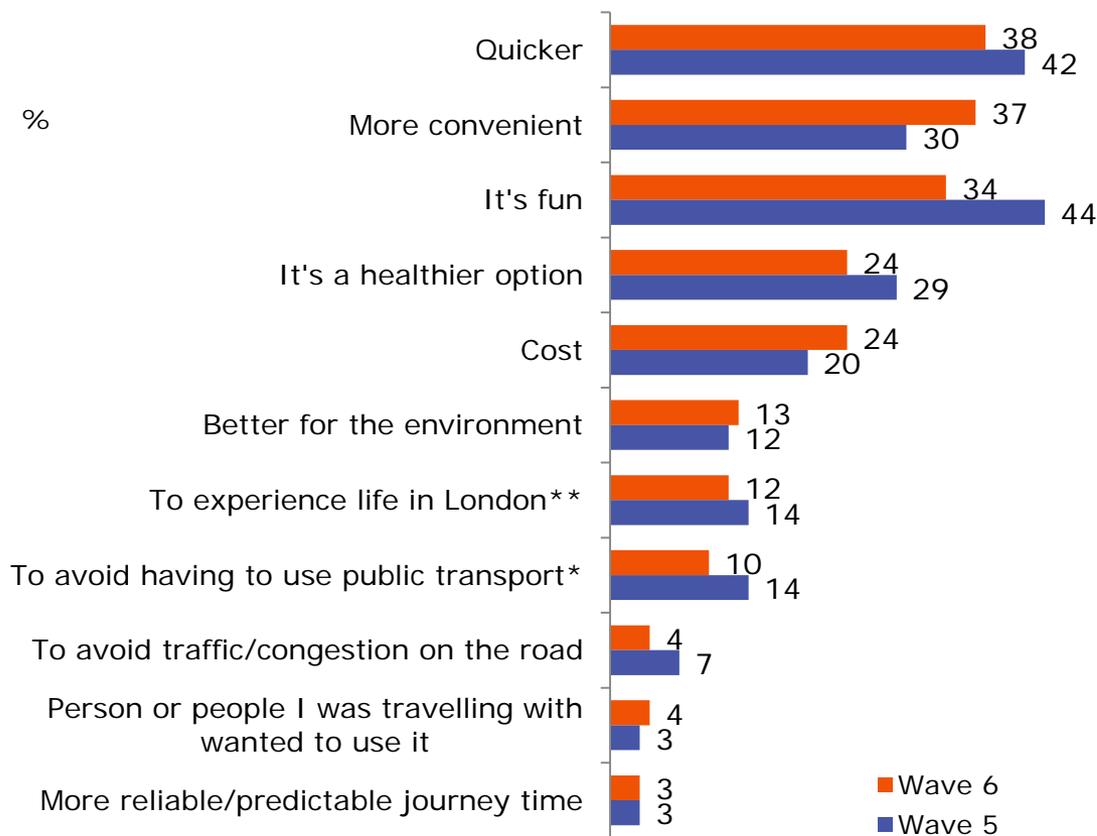


Q9. What is the main purpose of the current trip that you are making today using Santander Cycles?

Base: Casual users W5: All 1021 / W6: All 604; Central: 483; Eastern: 61; Western: 60



Speed and convenience are the key reasons choosing Santander Cycles for this trip; those choosing speed has decreased slightly since last wave whereas those choosing convenience has increased. Using the bikes for fun is most important to those in the Eastern zone.



	Central	Eastern	Western
Quicker	38	38	37
More convenient	36	31	46
It's fun	35	43	26
It's a healthier option	23	32	24
Cost	27	20	16
Better for the environment	13	14	10
To experience life in London**	14	8	7
To avoid having to use public transport*	11	7	9
To avoid traffic/congestion on the road	4	7	3
Person or people I was travelling with wanted to use it	5	5	0
More reliable/predictable journey time	3	6	3

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

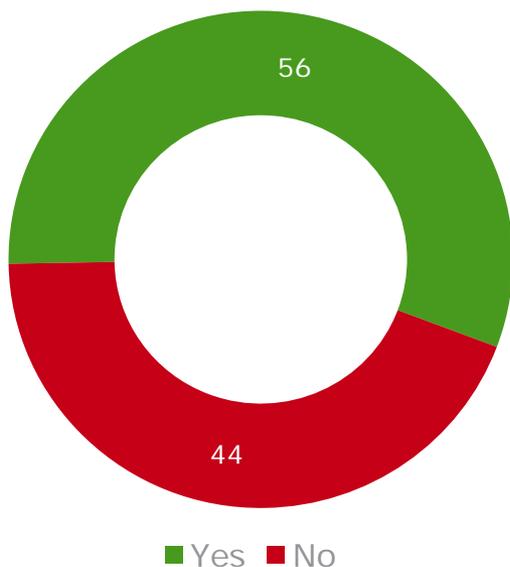
Base: Casual users W5: All 1021; W6: All 604 Central: 483; Eastern: 61; Western: 60



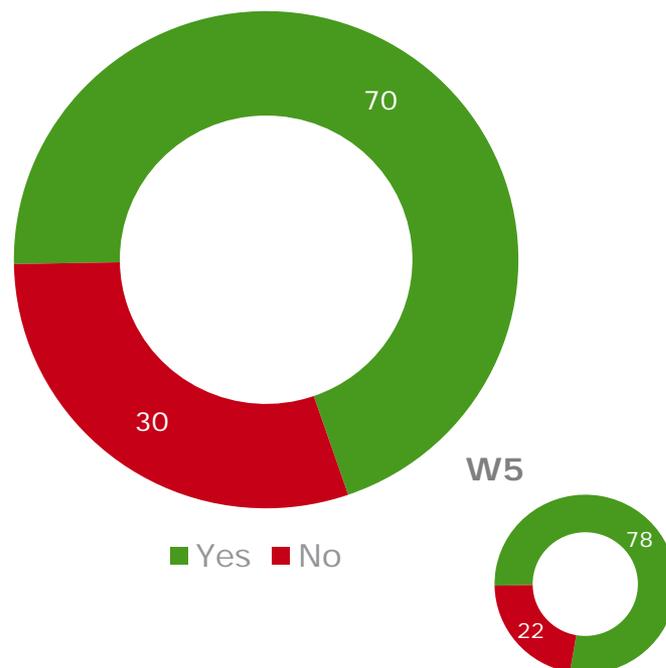
Over half of casual users are aware of the Santander Cycles app. Seven in ten UK residents who use the scheme at least fortnightly are aware of Santander Cycles membership, and this is a decrease compared to last wave (70% this wave, down from 78%)

Are you aware of the Santander Cycles App?

%



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

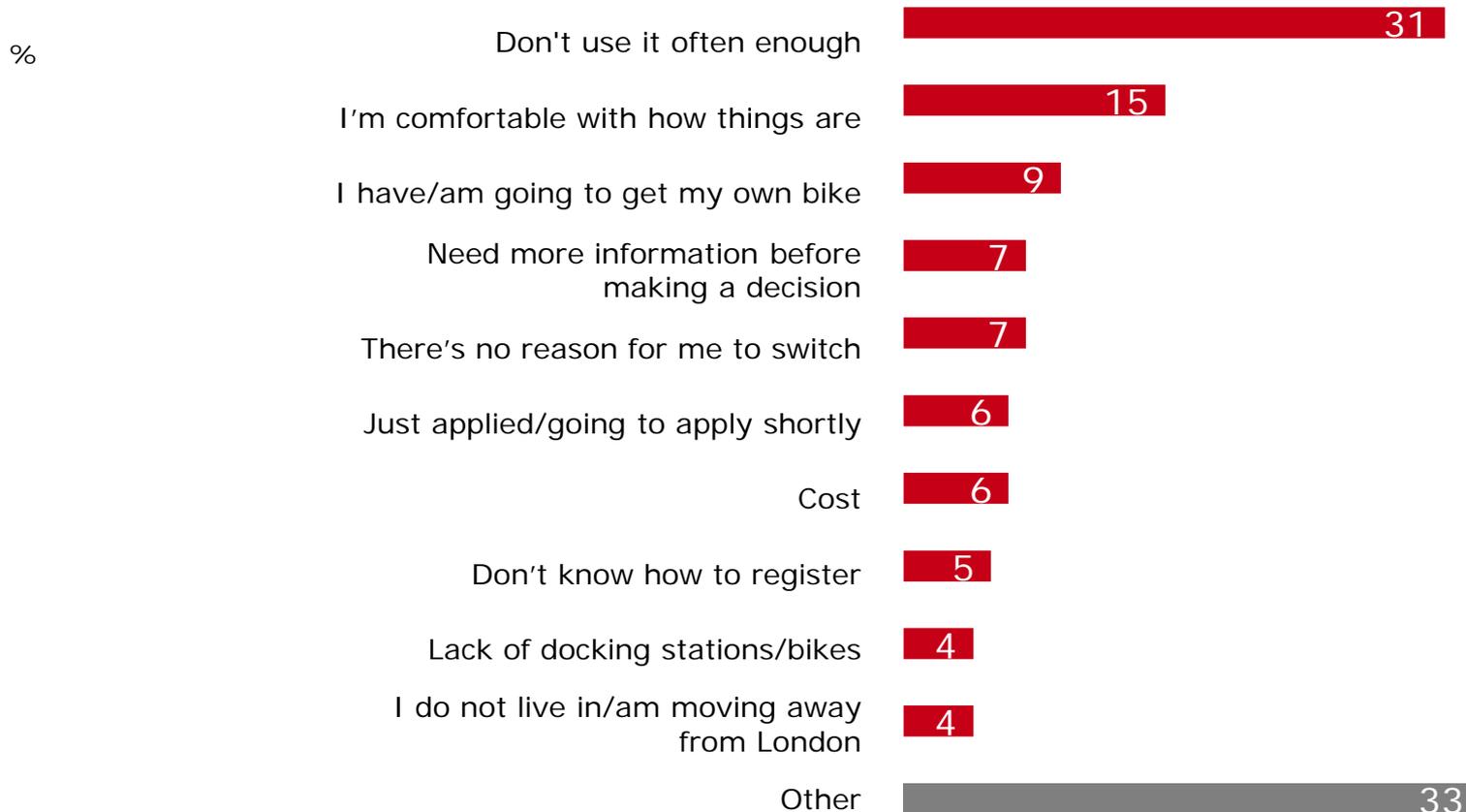


Q37. Are you aware of the Santander Cycles app? Base: Casual users W6: 604

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? Base: living in the UK and using Santander Cycles once a fortnight or more: W5: 476; W6: 267



Among those aware that registering as a member gets you a key, almost a third said they don't use it often enough to be worth registering as a member.

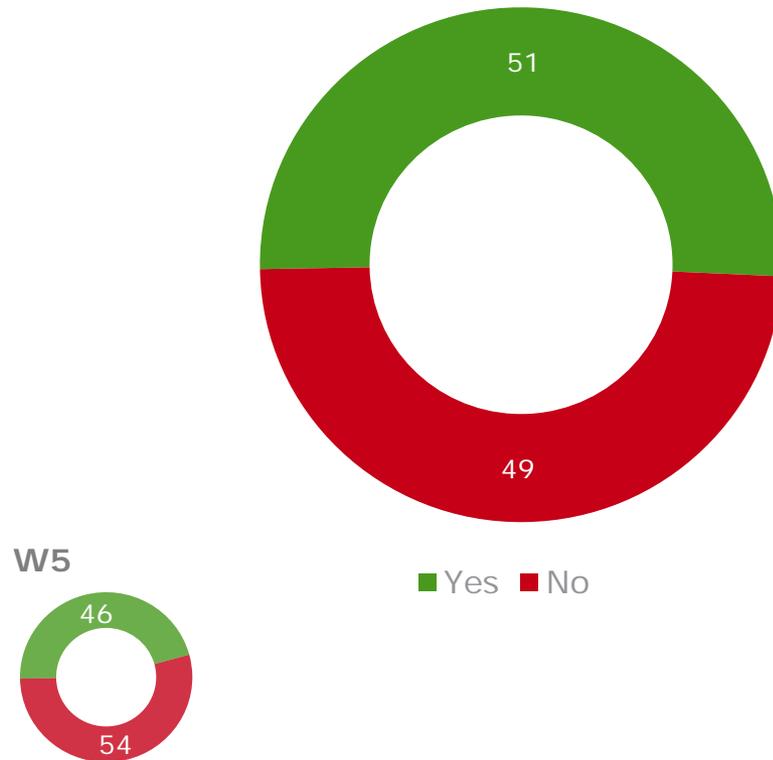


Q38. What are the factors stopping you from registering as a member? Base: All those aware that registering as a member gets you a key: W6: 183

Just over half of all casual users own a bicycle, (51%, up from 46% last wave).

Ownership of a bicycle
(among all casual users)

%



Q24. Do you own a bicycle? Base: Casual users: W5: 1021; W6: 604