

Santander Cycles Customer Satisfaction and Usage Survey

Casual Users Only: Quarter 2 2016/17



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 at peak levels for overall experience (86) and recommendation (92).
- This year sees a big increase in those agreeing London is a city for cycling (from 63% to 72%) and Santander Cycles makes London a better place to cycle (from 77% to 88%). The same positive trend was seen in the members survey.
- Ease of use has strengthened as the main reason for a positive experience (from 35% to 42%) and bike availability, bike quality, cost and health benefits are more likely to be mentioned as positives this year.
- Fun and speed, the key reasons for choosing Santander Cycles for this trip, have both increased slightly since last year, and avoiding traffic and cost have both declined slightly.
- 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. However, this wave, there are fewer first timers and fewer very frequent (5+ days per week) users – but more infrequent (2-4 days per week) users.
- Just over half (54%) are aware of the app.

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 2016/17 comprised 93 shifts at Central zone docking stations, 36 in the Eastern zone and 31 in the Western Zone between 4th July and 14th August 2016.

A total of 1022 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: 28%
- Respondent had just **docked** a bike: 72%

Number of interviews:

	Target	Achieved (unweighted)	Achieved (weighted)
Central Zone	700	642	743
Eastern Zone	200	169	120
Western Zone	200	211	159
Total	1100	1022	1022

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

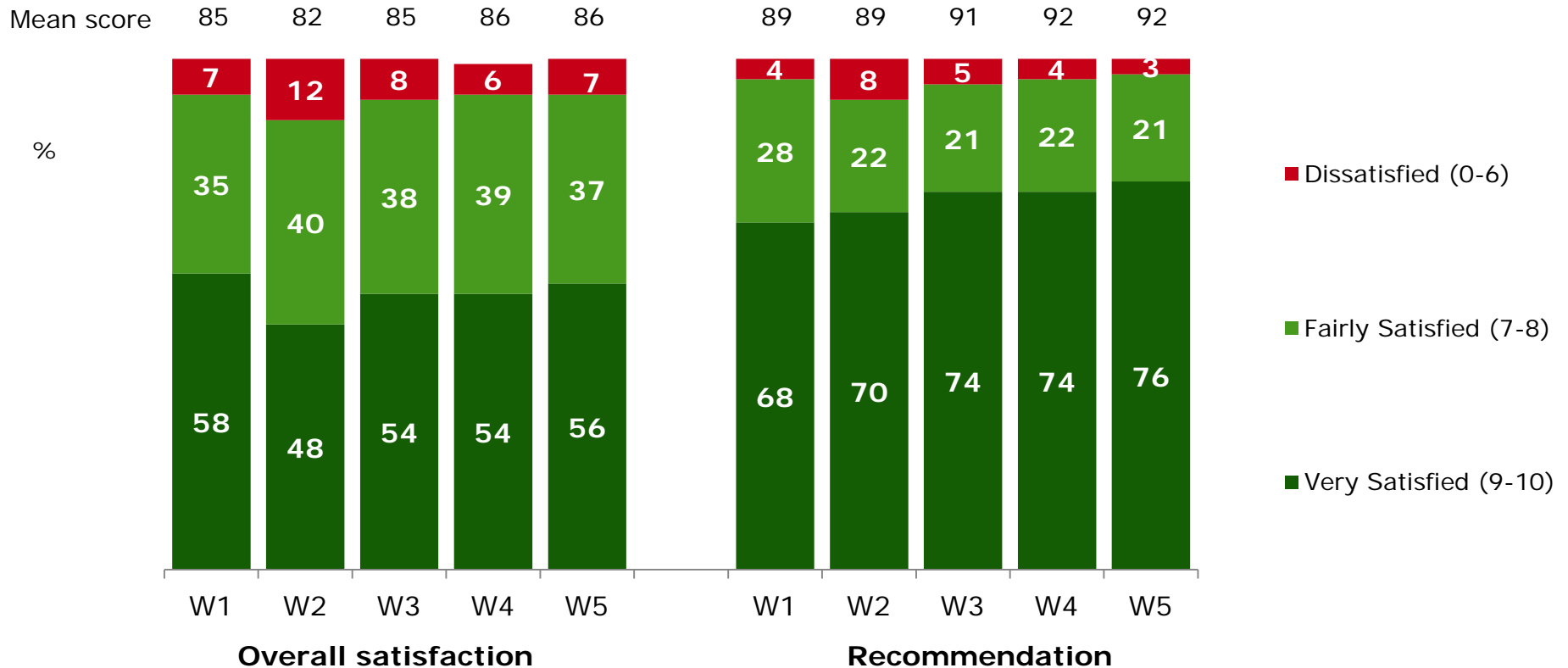
		Weight
Central Zone	Busy (600+ dockings in the month)	54.75%
	Average (300-599 dockings in the month)	14.96%
	Quiet (<300 dockings in the month)	2.98%
Eastern Zone	Busy (600+ dockings in the month)	6.27%
	Average (300-599 dockings in the month)	3.86%
	Quiet (<300 dockings in the month)	1.57%
Western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

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Satisfaction with Santander Cycles/ likes and dislikes



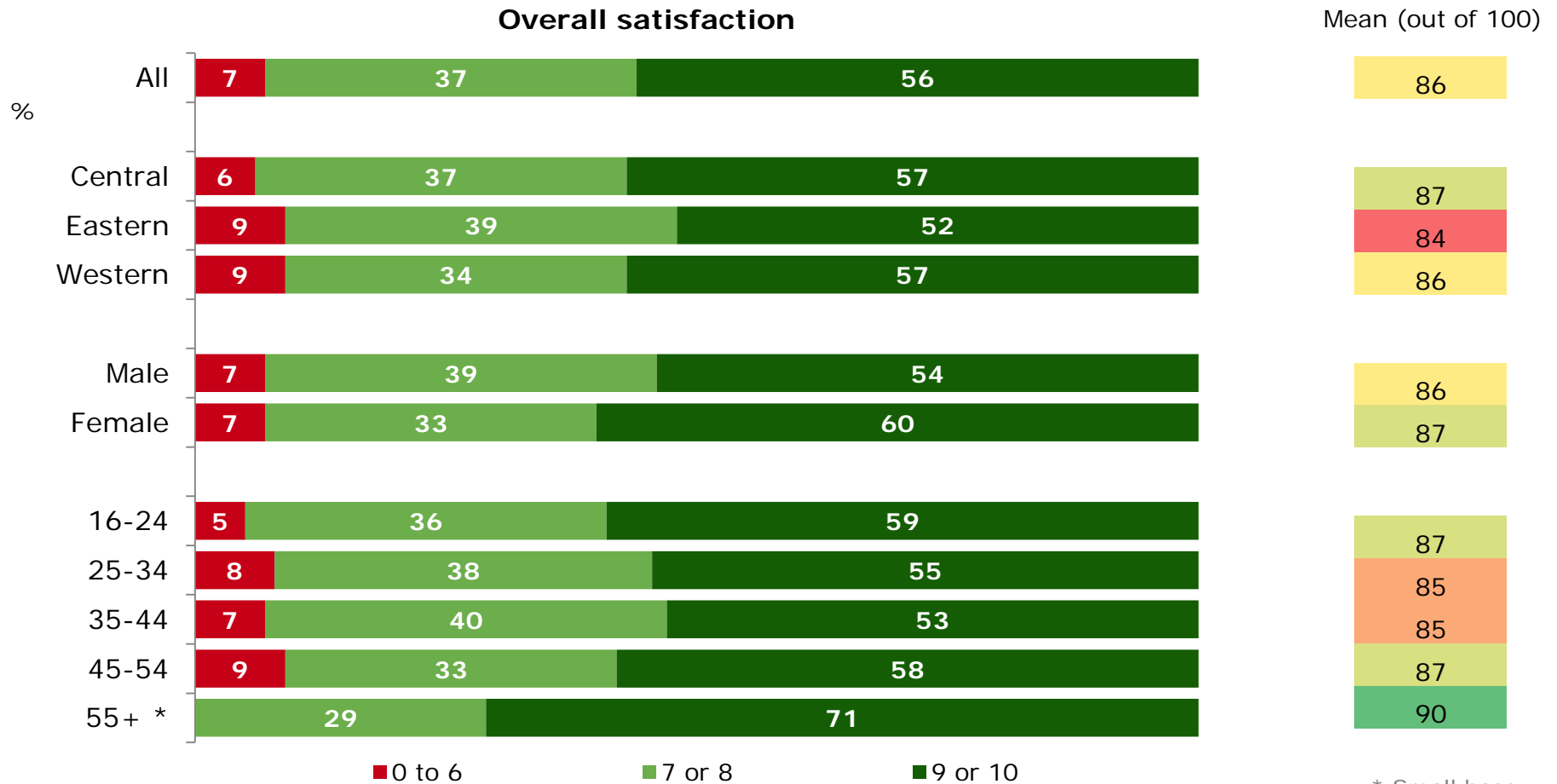
Satisfaction remains at peak levels for overall experience (86) and likelihood to recommend (92).



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: 1022



Eastern zone users are slightly less satisfied than elsewhere. Older users (55+) were more satisfied than other age groups.



* Small base

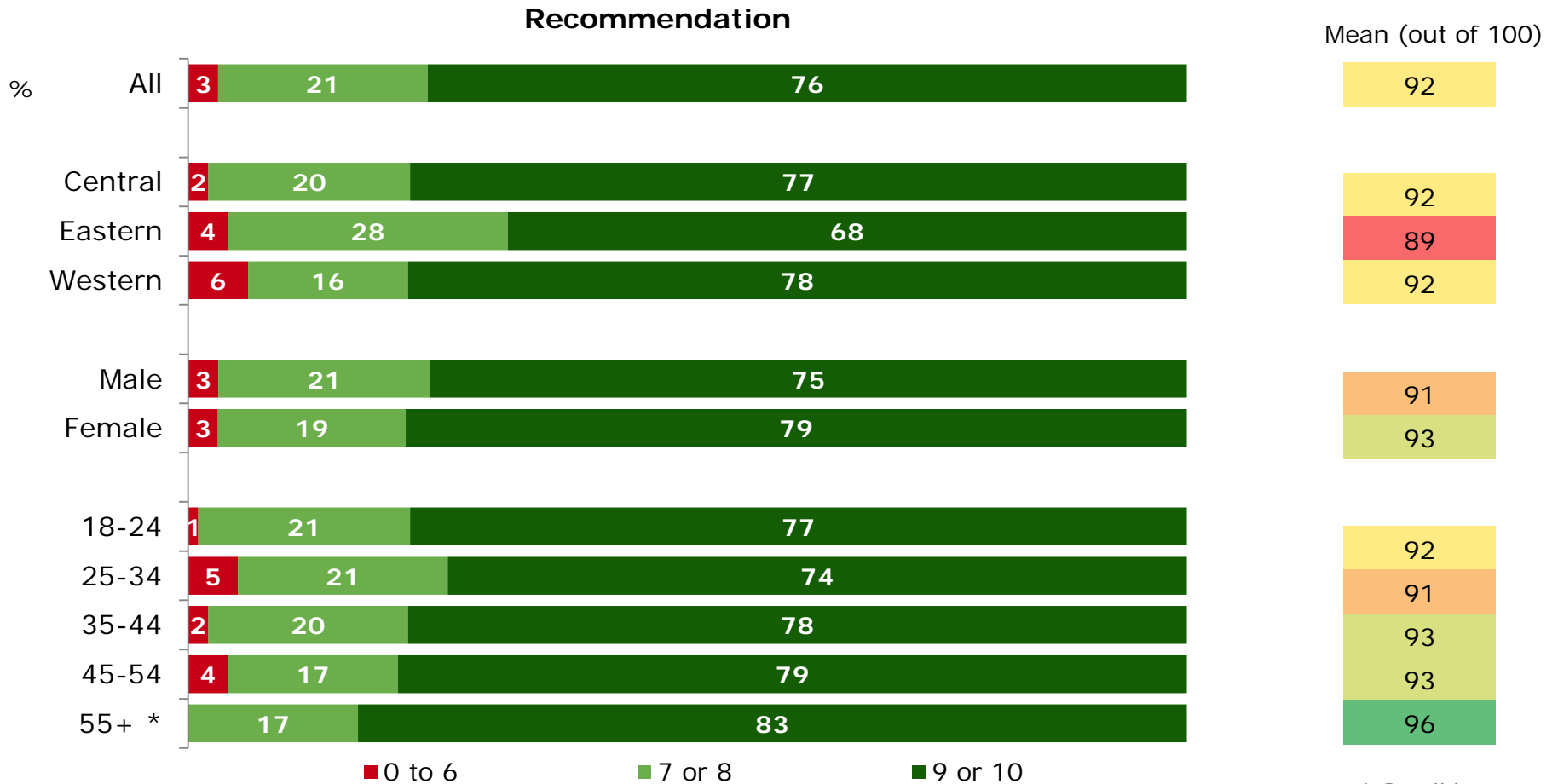
Q12. Taking everything into account, how satisfied are you with your overall experience of Santander Cycles today?

Base: Casual users W5: All:1022; Central: 642; Eastern: 169; Western: 211; Male: 692; Female: 330; 16-24: 315; 25-34: 454; 35-44: 130; 45-54: 98; 55+: 25*

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In line with overall satisfaction, Eastern zone are least likely - and over 55's are most likely - to recommend.



* Small base

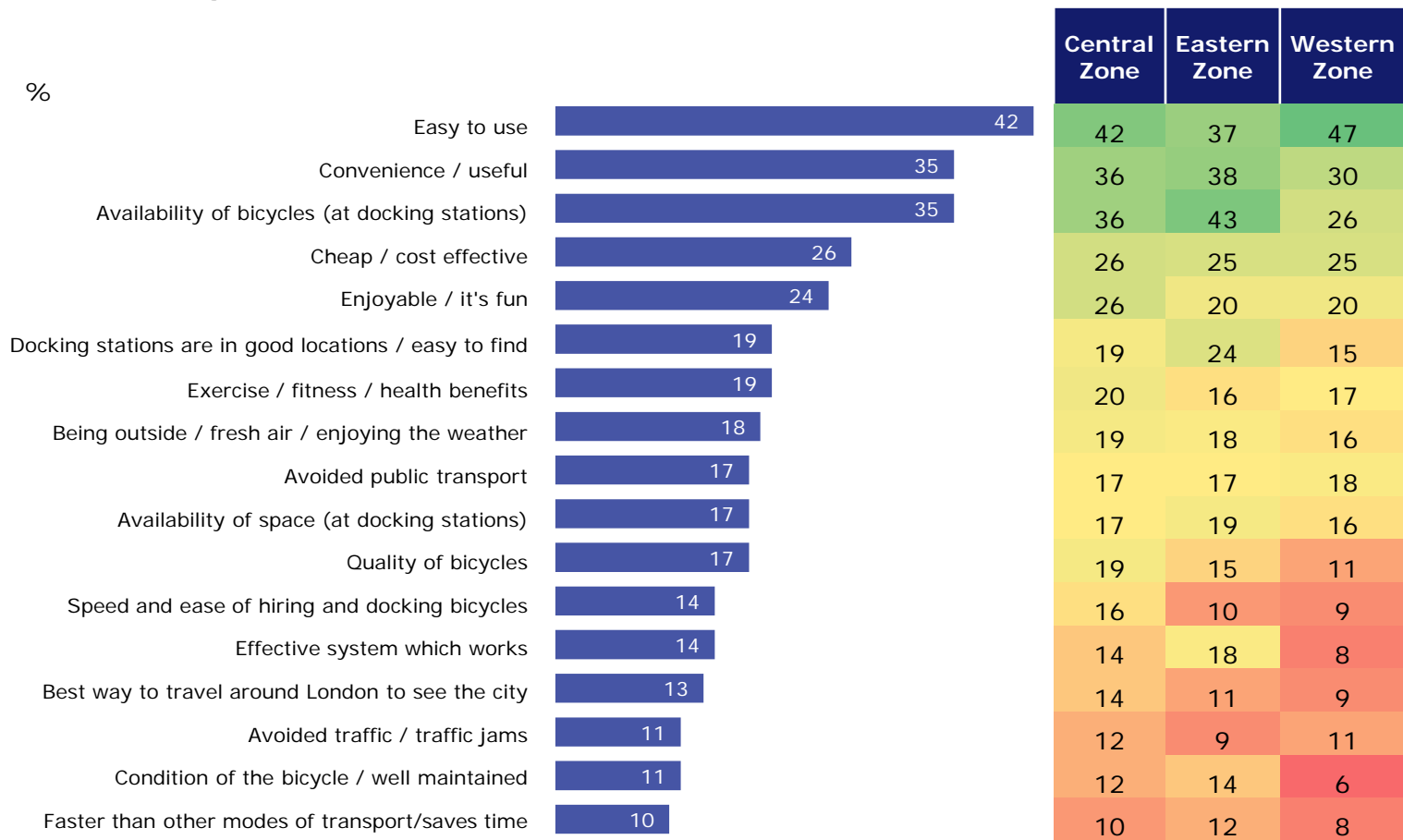
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Ease of use is the main attraction, followed by convenience and bike availability. Eastern zone users are the least positive about ease of use, but more positive about bike availability, well located docking stations and convenience.



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

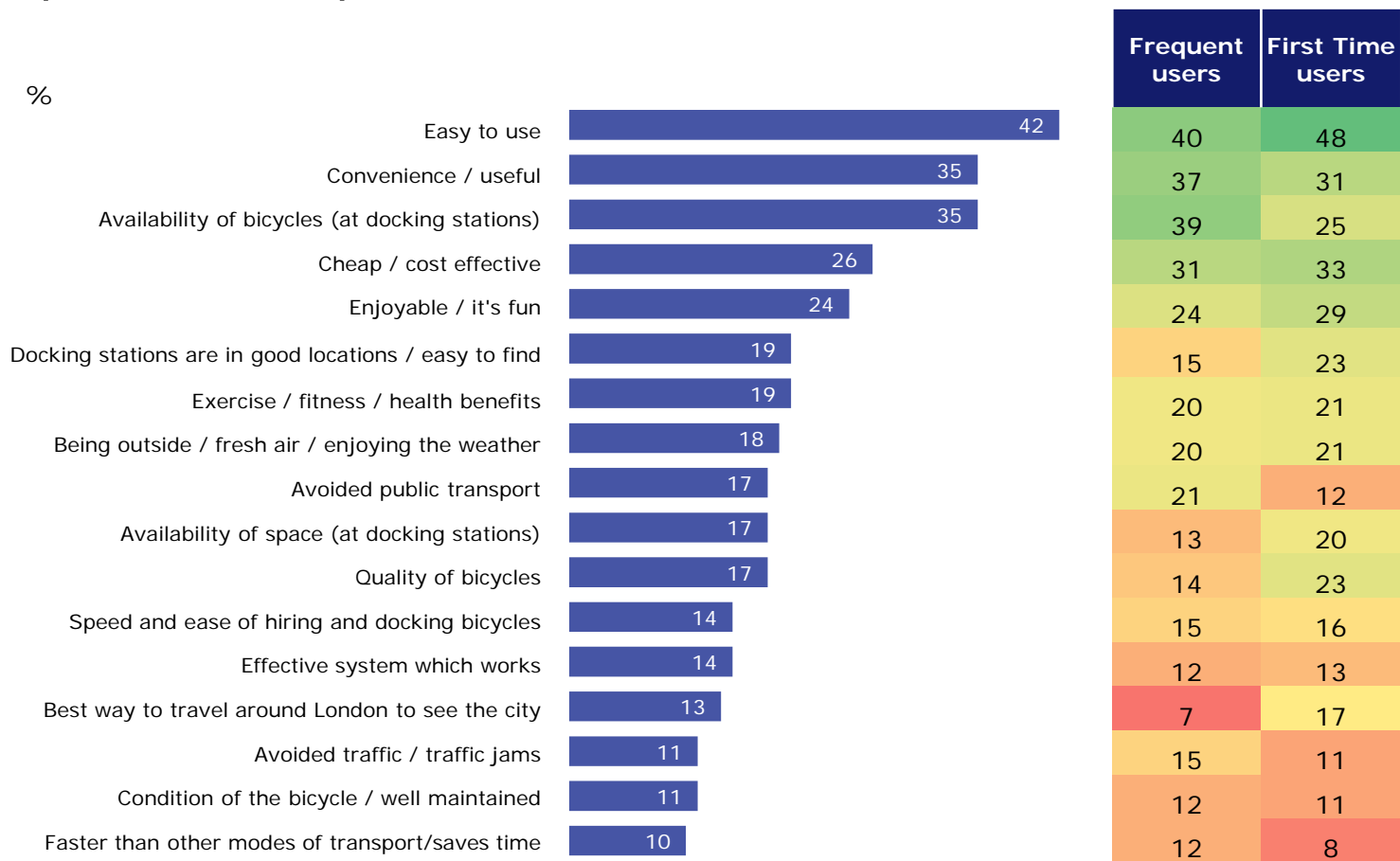
Base: Casual users W5: All 1022, Central: 642; Eastern: 169; Western: 211; Frequent users (3-5 days a week): 218; First time users: 206

©TNS

Mentions above 5% in W5 are shown



First timers are more positive about ease of use, well located docking stations, bike quality and best way of seeing the city, whereas frequent users value the bike availability and avoiding public transport.



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

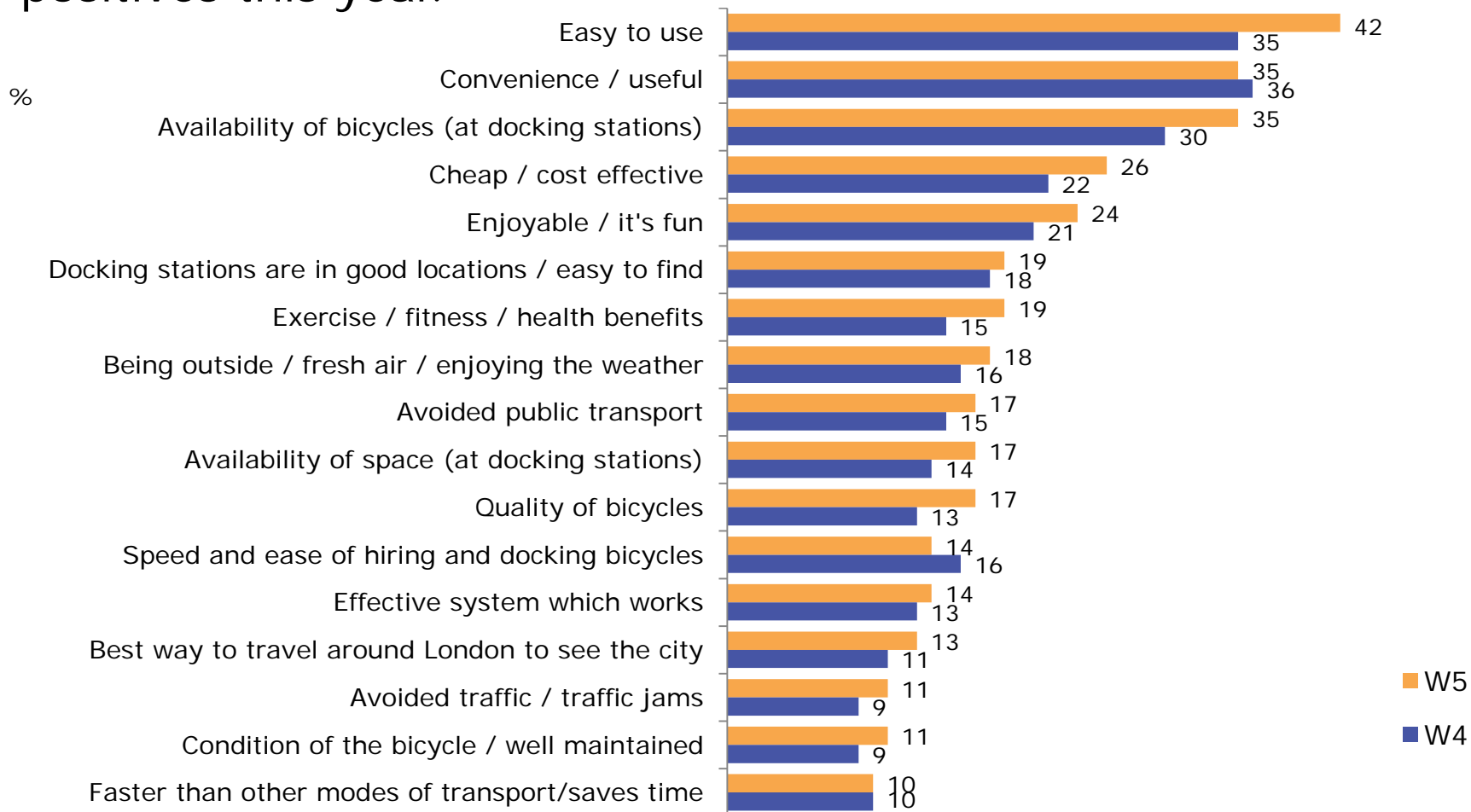
Base: Casual users W5: All 1022, Central: 642; Eastern: 169; Western: 211; Frequent users (3-5 days a week): 218; First time users: 206

©TNS

Mentions above 5% in W5 are shown



Ease of use has strengthened as the main reason for a positive experience (from 35% to 42%) and bike availability, bike quality, cost and health benefits are more likely to be mentioned as positives this year.



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

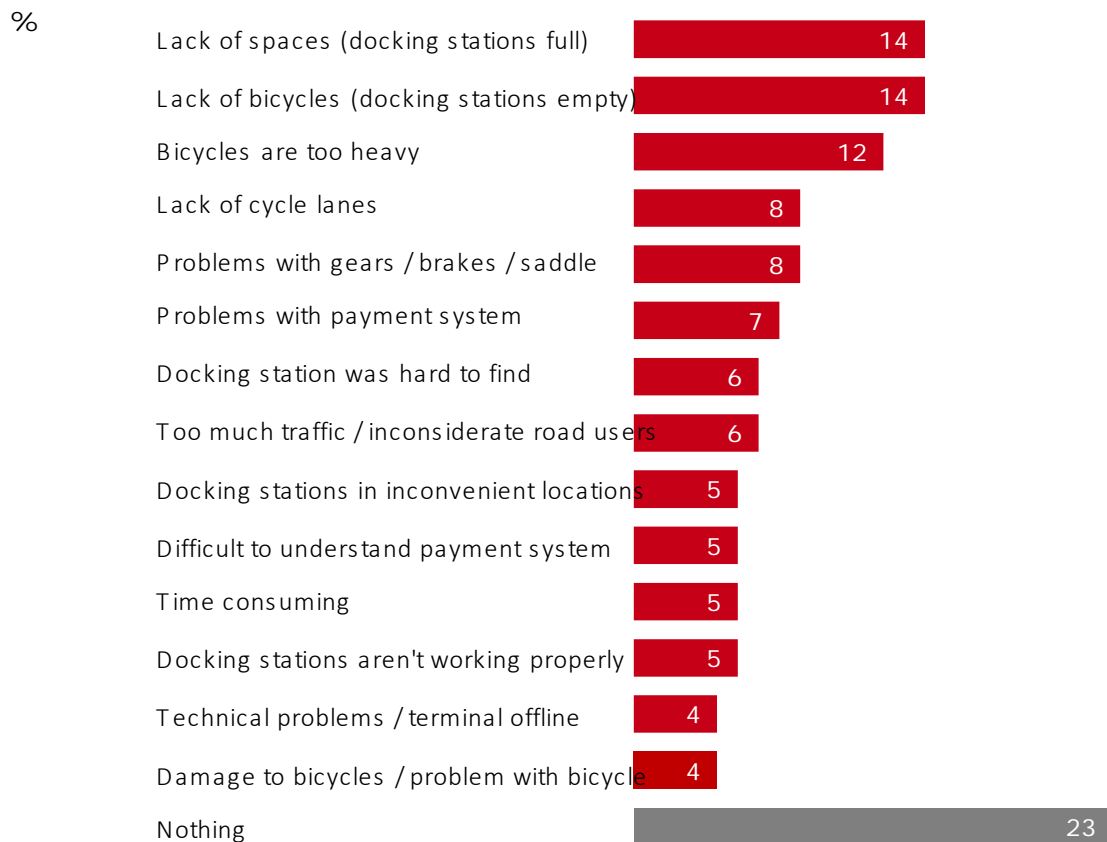
Base: All casual users: W4 1051, W5 1022

Mentions above 4% in W3 are shown

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Overall, the main concerns are lack of bikes and spaces at docking stations. Eastern zone users raised more issues (only 12% had none), particularly lack of spaces (21%, compared to 12-13% elsewhere). Western Zone users mentioned the lack of cycle lanes.



	Central Zone	Eastern Zone	Western Zone
Lack of spaces (docking stations full)	13	21	12
Lack of bicycles (docking stations empty)	13	14	15
Bicycles are too heavy	10	19	16
Lack of cycle lanes	7	6	13
Problems with gears /brakes /saddle	8	5	7
Problems with payment system	7	5	6
Docking station was hard to find	7	7	3
Too much traffic /inconsiderate road users	6	4	4
Docking stations in inconvenient locations	5	8	4
Difficult to understand payment system	6	4	4
Time consuming	6	4	3
Docking stations aren't working properly	5	7	3
Technical problems / terminal offline	3	5	8
Damage to bicycles / problem with bicycle	4	7	2
Nothing	25	12	23

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

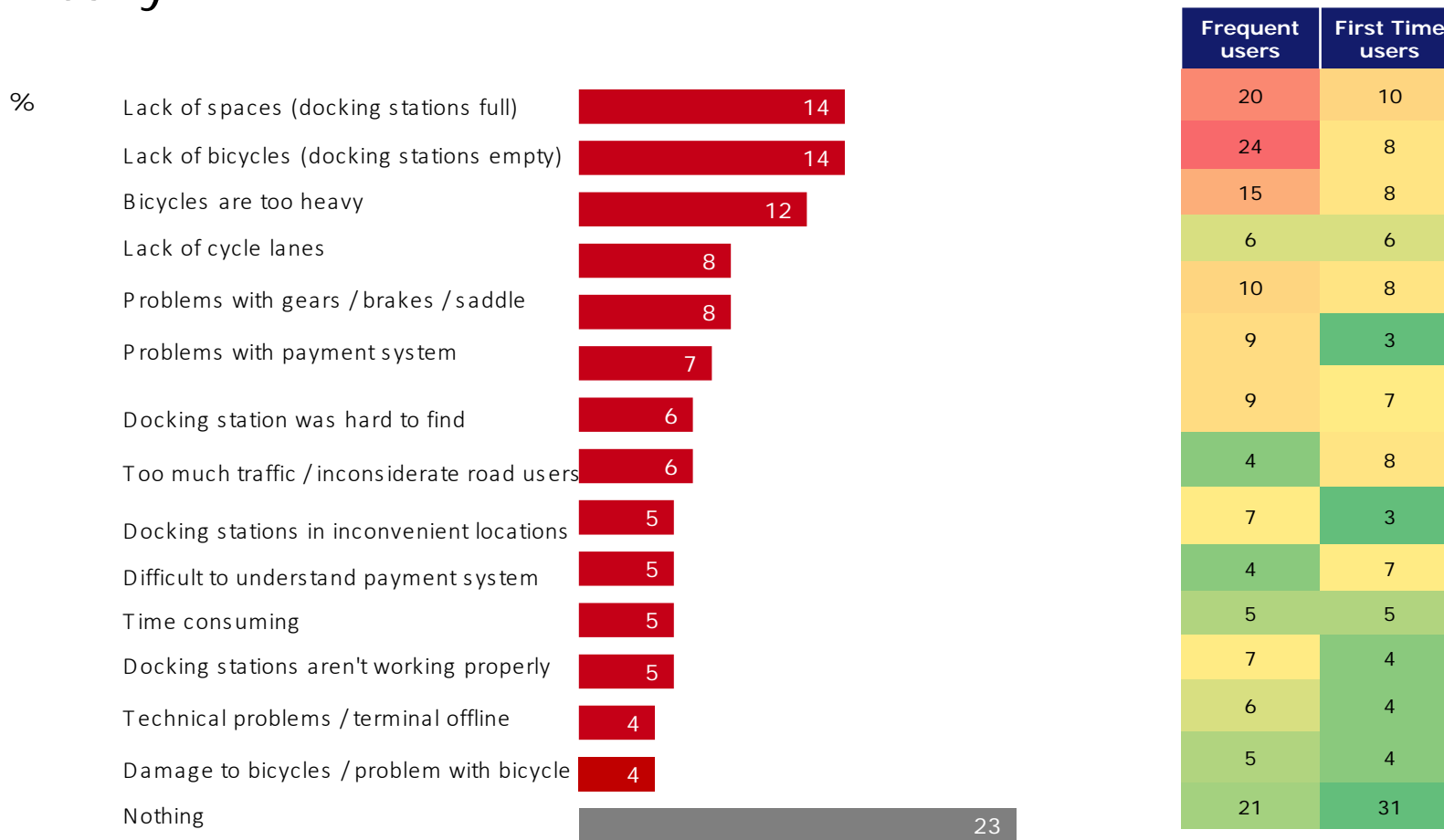
Base: Casual users W5: All 1022, Central: 642; Eastern: 169; Western: 211; Frequent users (3-5 days a week): 218; First time users: 206

©TNS

Mentions above 4% in W5 are shown



First timers are less likely to raise concerns (31% had none compared to 21% of frequent users). Frequent users were more concerned about lack of bikes and spaces, and bikes are too heavy.



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

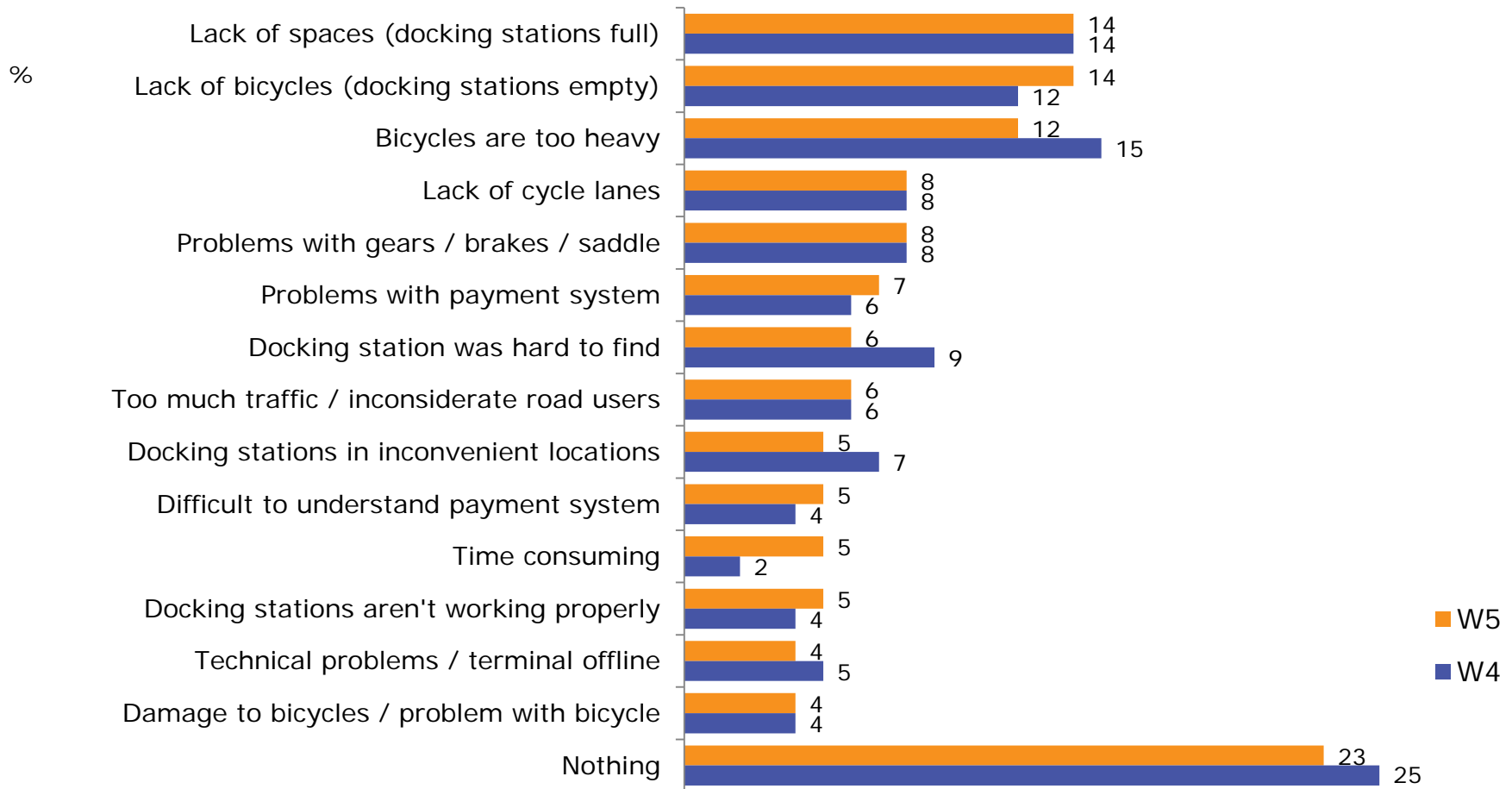
Base: Casual users W5: All 1022, Central: 642; Eastern: 169; Western: 211; Frequent users (3-5 days a week): 218; First time users: 206

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Mentions above 4% in W5 are shown



There are slightly fewer mentions bikes being too heavy and docking stations being hard to find this wave.



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

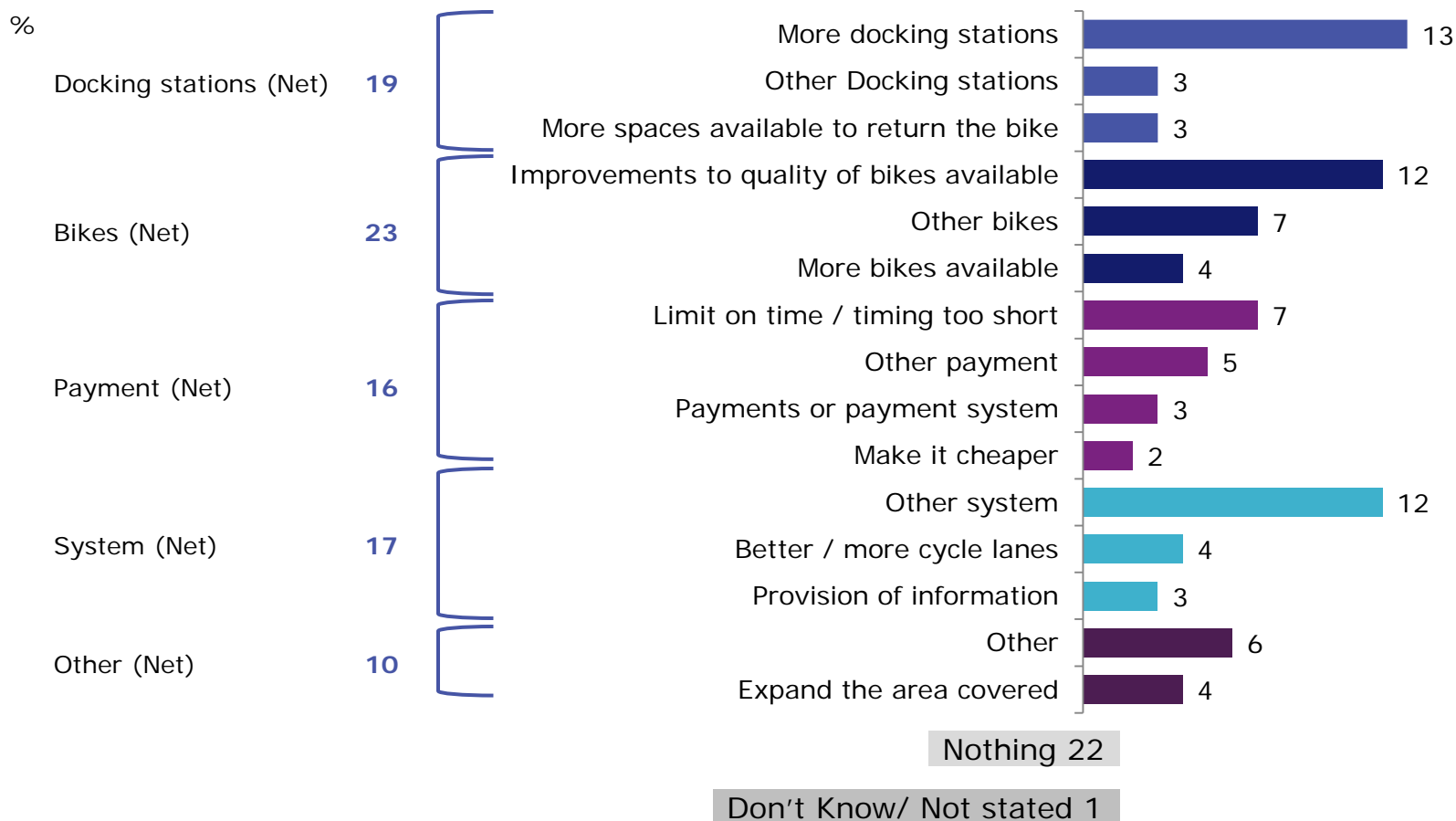
Base: All casual users: W4: 1051, W5 1022

Mentions above 4% in W5 are shown

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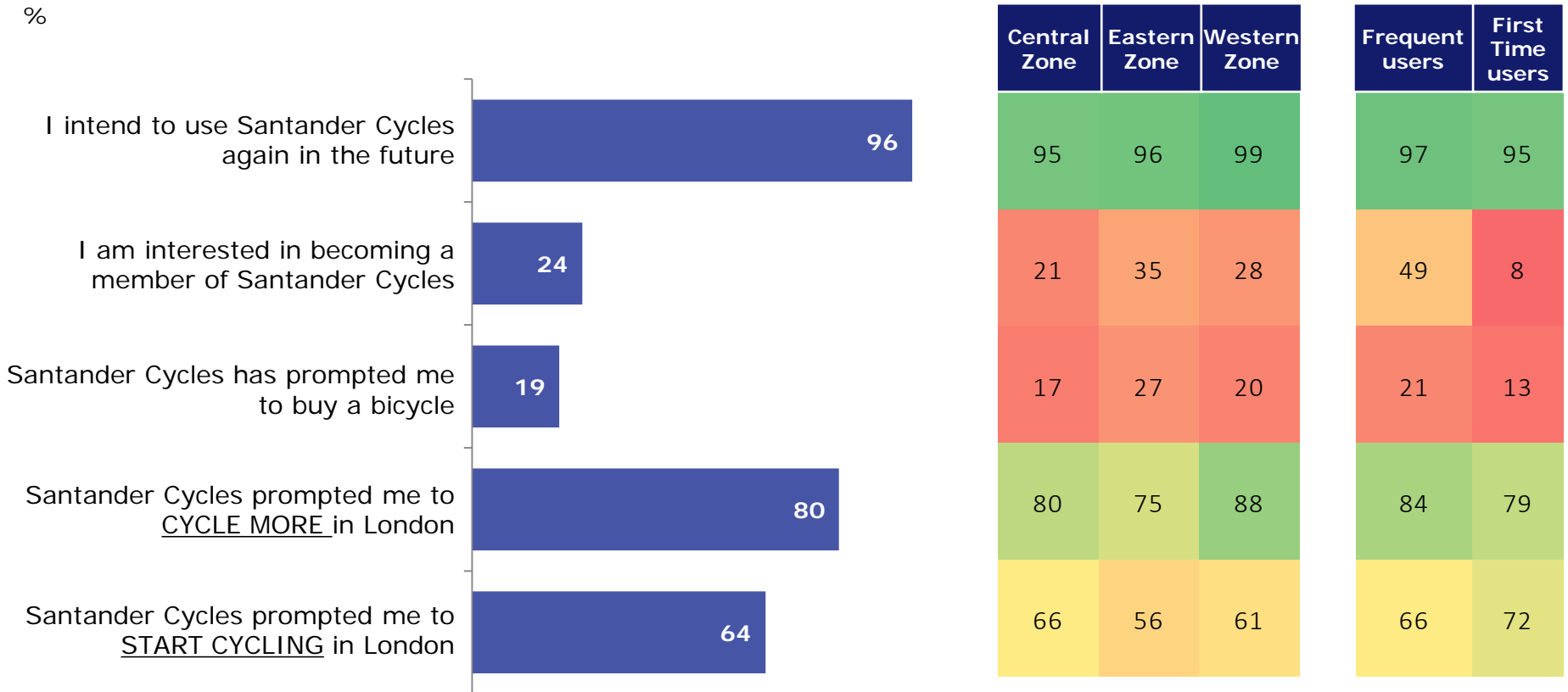
The number of docking stations and bike quality are the main suggested improvements.



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

Base: Casual users W5: All 1022

Almost all casual users intend to use Santander Cycles again, two thirds say it prompted them to start cycling in London and 8 in 10 say it has encouraged them to cycle more in London. About half of frequent users expressed interest in membership and interest was slightly higher in the Eastern Zone.



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

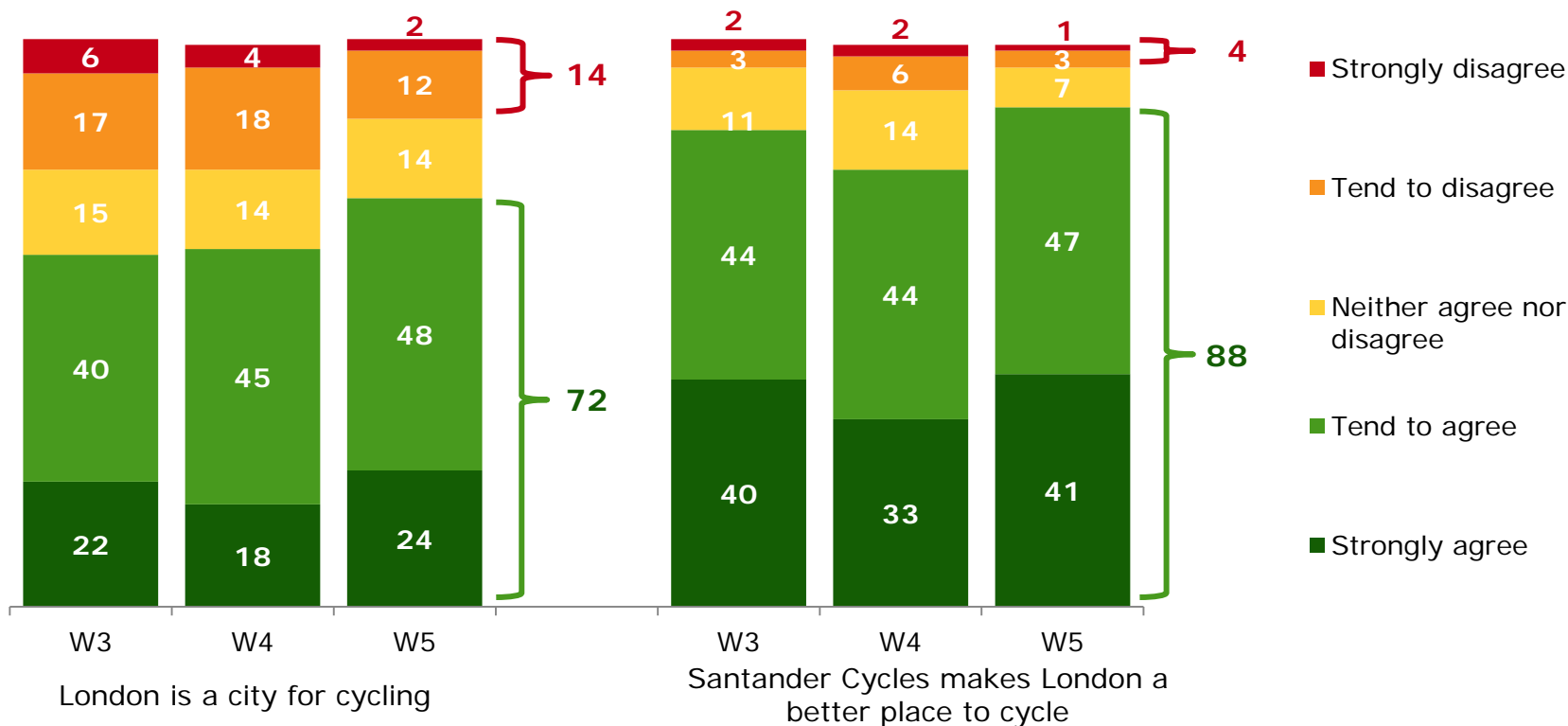
Base: Casual users W5: All 1022, Central: 642; Eastern: 169; Western: 211; Frequent users (3-5 days a week): 218; First time users: 206

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This wave sees a big increase in those agreeing London is a city for cycling (from 63% to 72%) and Santander Cycles makes London a better place to cycle (from 77% to 88%). The same positive trend was seen in the members survey.

%

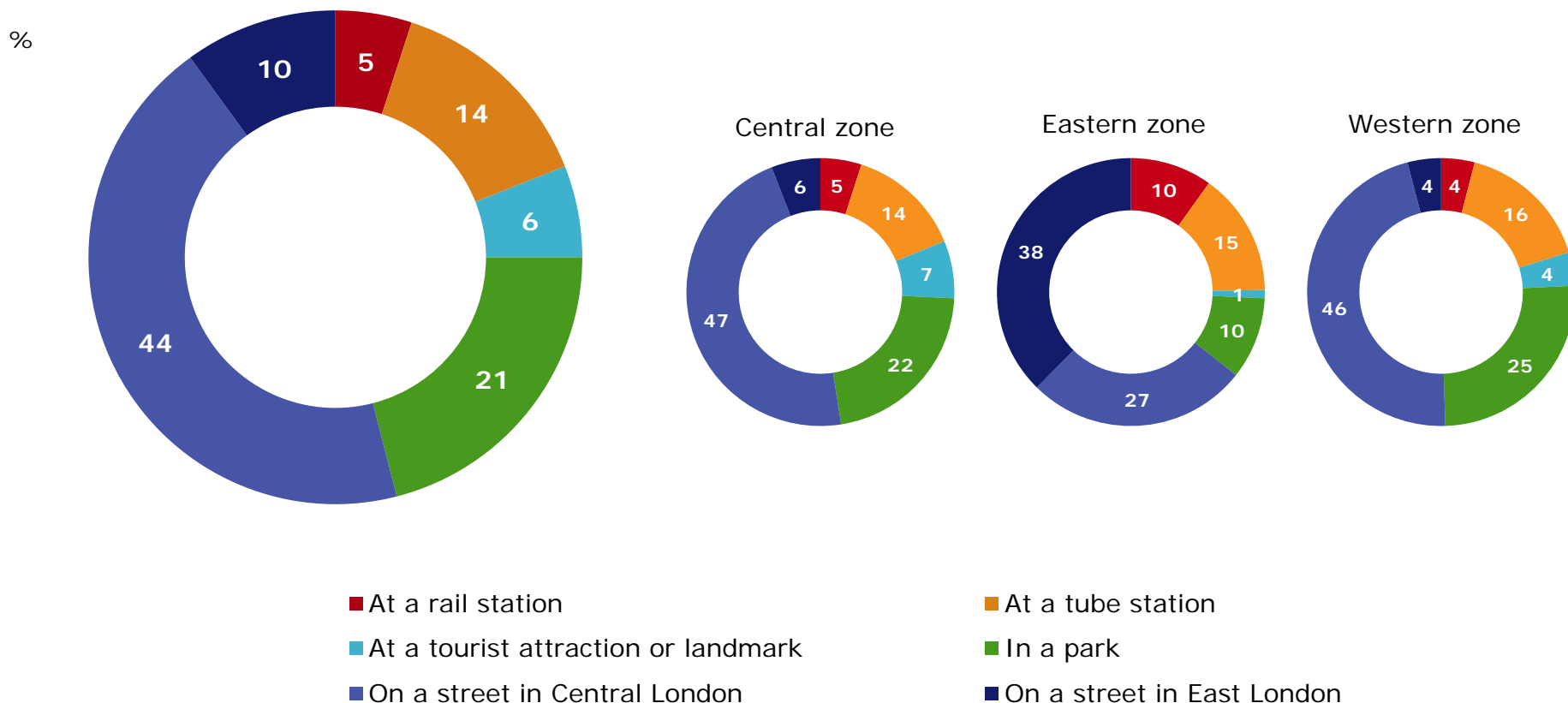


Q20.To what extent do you agree with the following statements?

Base: Casual users W3: All 1179; W4: All 1051; W5: All 1022



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 W5: All 1022, Central: 642; Eastern: 169; Western: 211

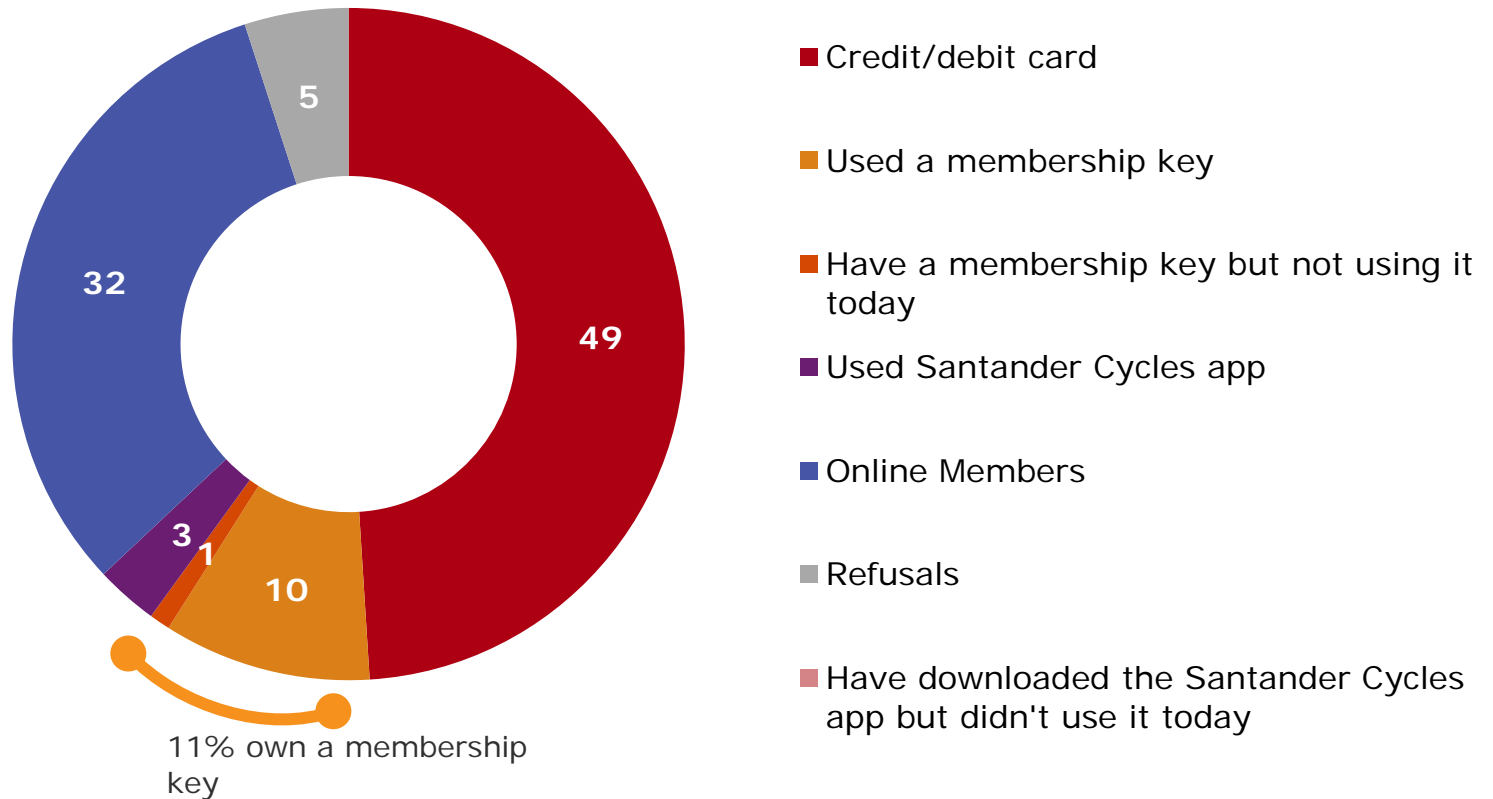
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Profile of casual users, and comparison with member profile



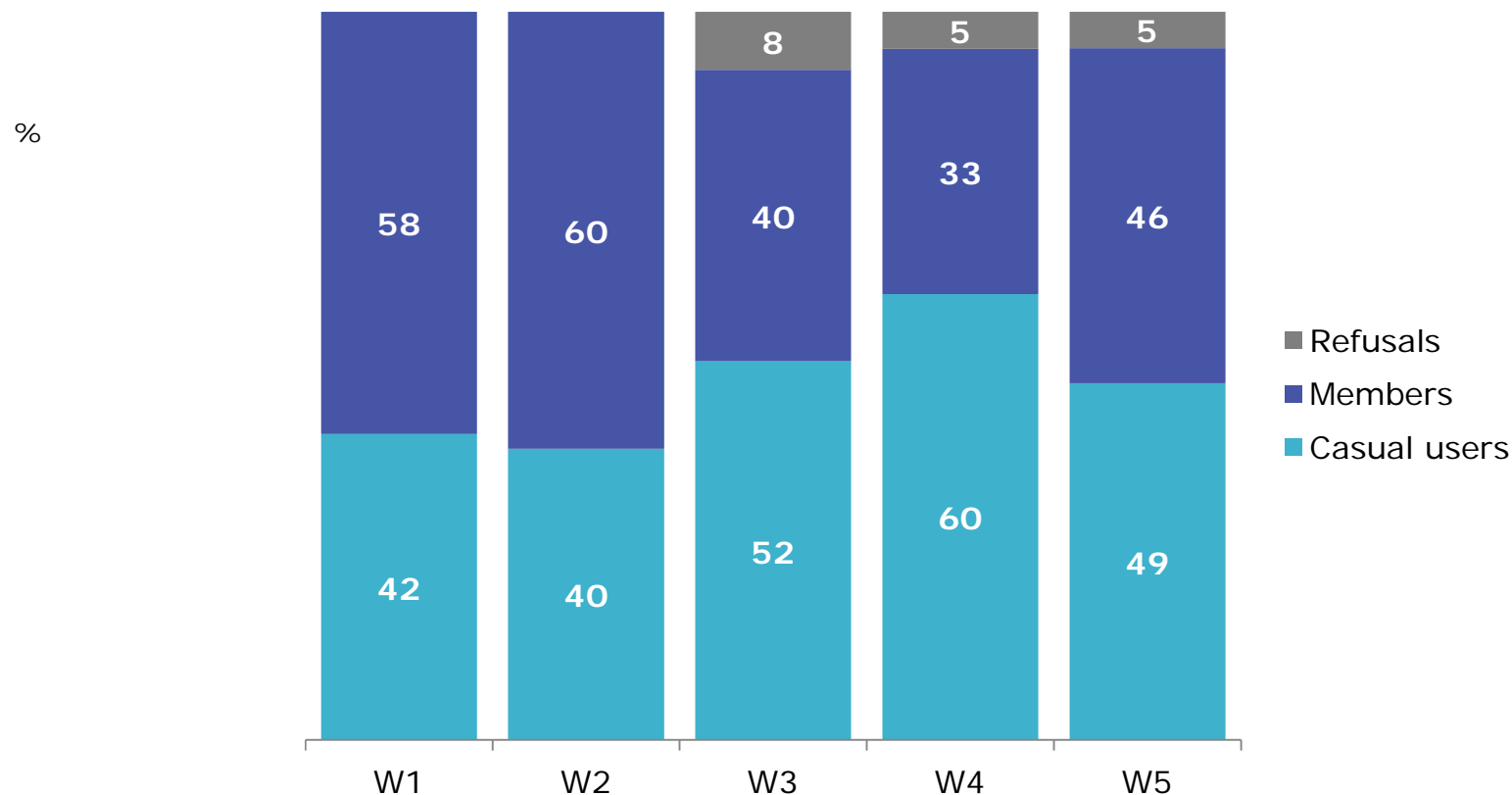
Of those approached, 46% identified themselves as members rather than casuals (32% said they had an online account, 11% said they own a membership key and another 3% had the app). All these members were excluded from the survey, leaving 49% who qualified for the survey as casuals (and paid by credit/debit card).

%



11% own a membership key

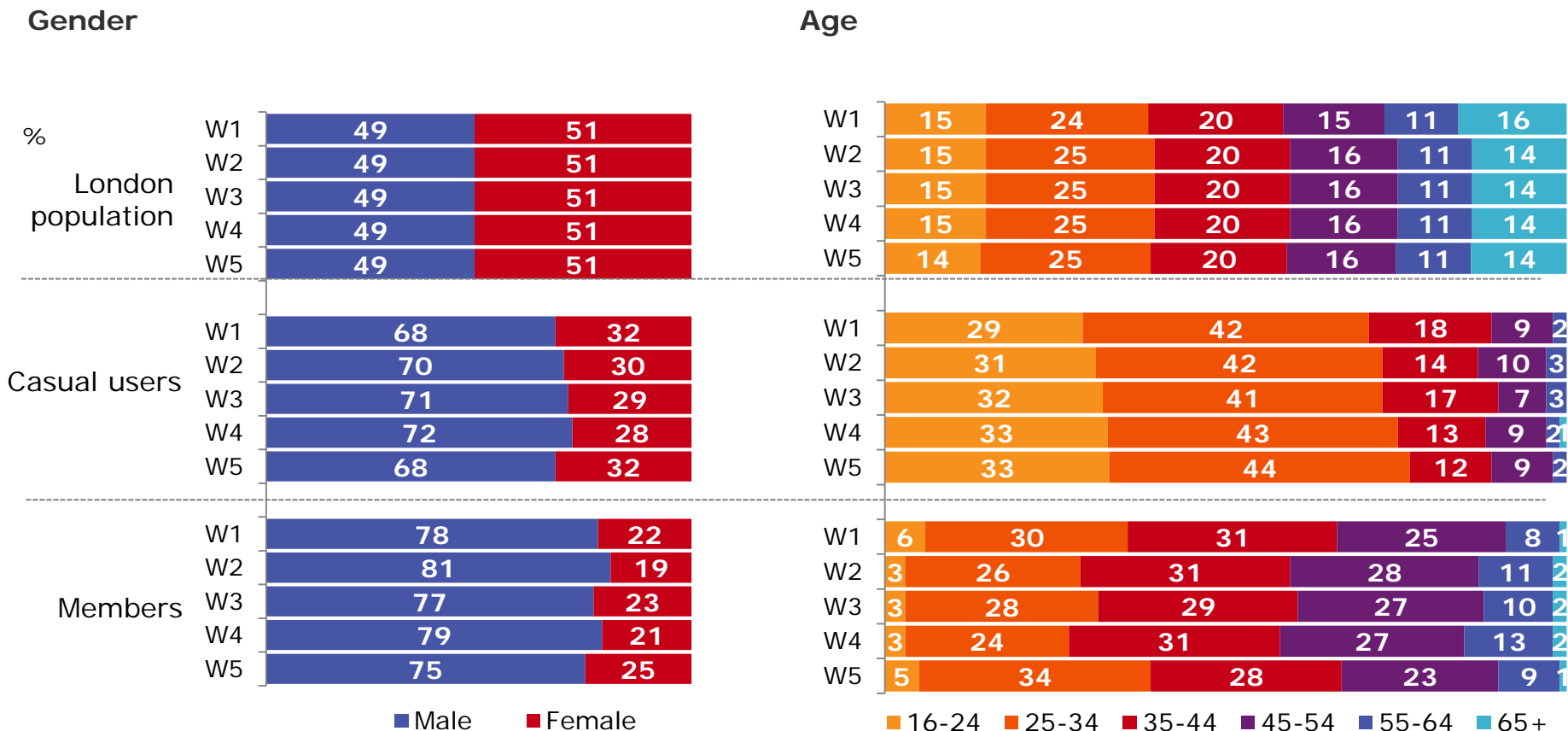
Compared to last wave, the proportion of casuals has decreased from almost two-thirds (60%) to just under half (49%).



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



There are higher proportions of males among both Santander Cycles members and casual users compared to the London population. A third of casual users are aged 16-24, compared to 14% of the population and only 5% of members.

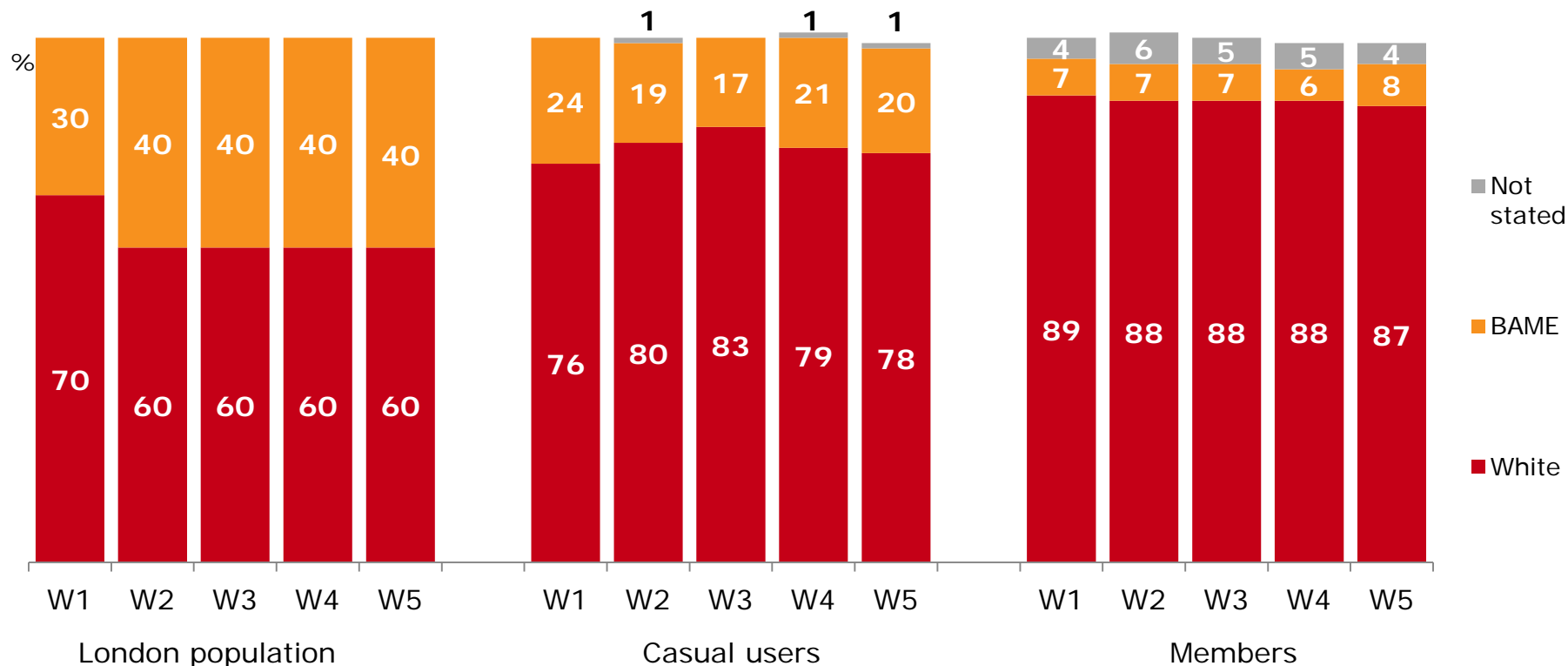


Q30. Interview: code respondent's gender / QK1 Gender. Are you...?
 Q3.And which of these age categories do you fall into? / S2.How old are you?

Base: Casual users W1: 1111; W2 1109; W3 1179; W4: 1051; W5: 1022 members W1: 4789; W2: 371; W3: 2998; W4: 2935; W5: 2266 London population Source 2011 census.



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

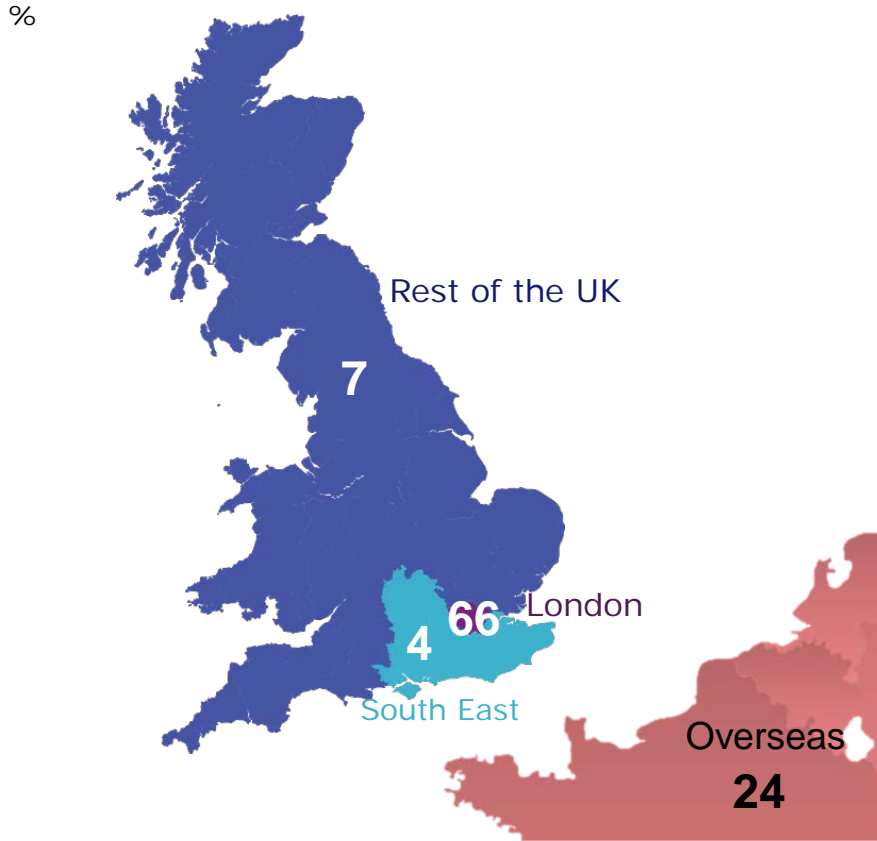


Q25.How would you describe your ethnicity? / QK3 And are you...?

Base: Casual users W1: 1111; W2 1109; W3 1179; W4 1051; W5 1022 members W1: 4789; W2: 3717; W3: 2998; W4: 2935; W5: 2266 London population Source 2011 census.



Two thirds of casual users are London residents, and almost a quarter live overseas. Of the overseas users, USA is most commonly mentioned, followed by France, Spain and Italy.



Country*	%
USA	15
France	9
Spain	9
Italy	9
Australia	6
Germany	5
Canada	5
UAE	5
Netherlands	4
Switzerland	4
Other	31

* All quoted by more than 3% of overseas respondents

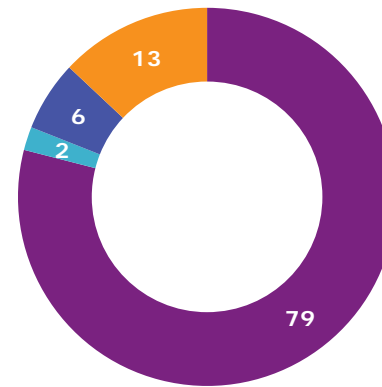
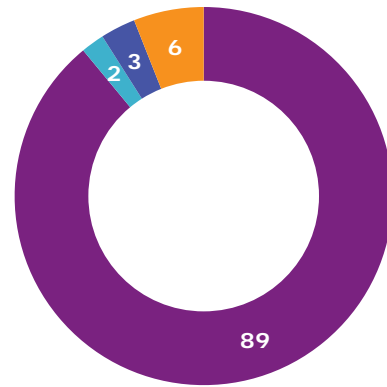
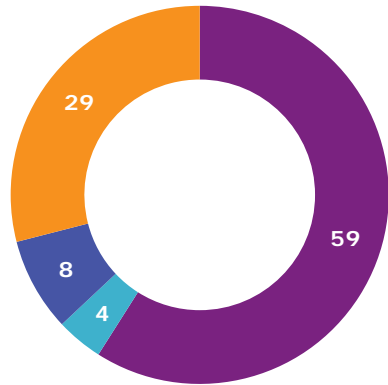
Q4. Where do you live? Q34 Which country do you normally live in?
 Base W5: Casual users: All 1022; Overseas resident: 234

The Central zone has the most overseas users (29%), consistent with last wave. However, there are fewer overseas users in the Eastern zone this wave (6%, down from 21% last wave).

Central zone

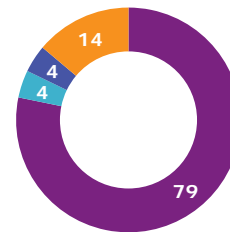
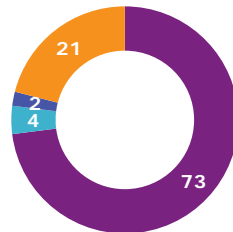
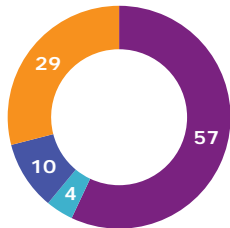
Eastern zone

Western zone



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

W4

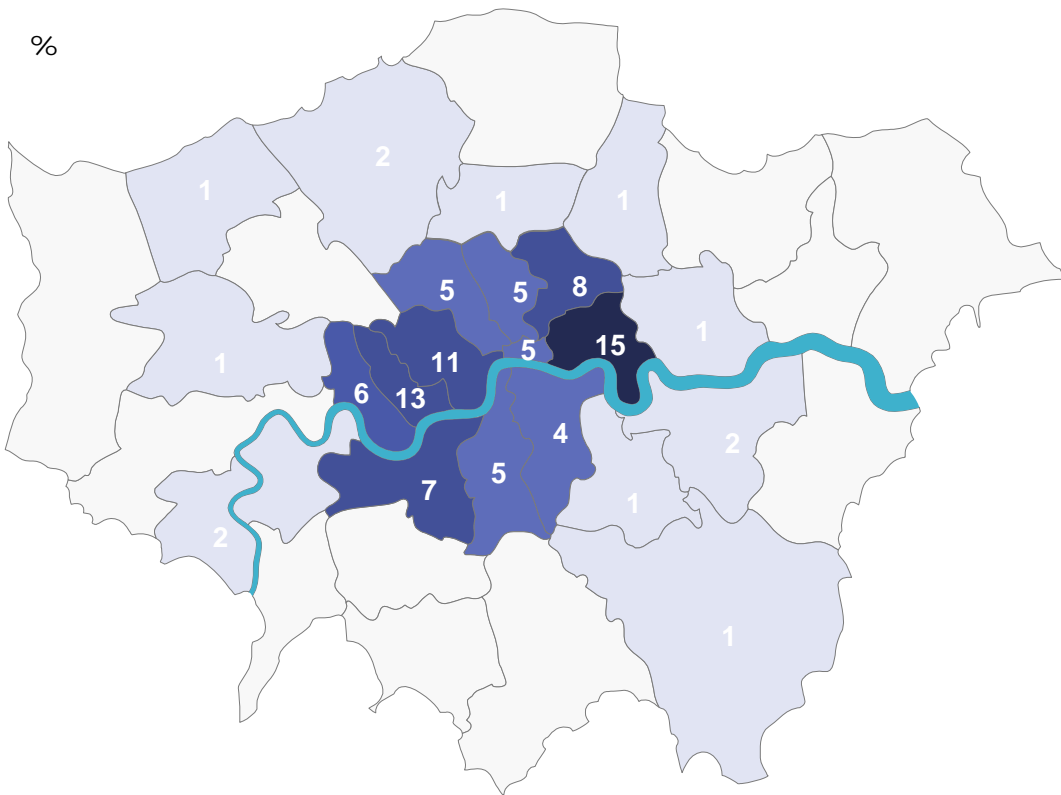


Q4. Where do you live?

Base: Casual users W5: All 1022; Central: 642; Eastern: 169; Western: 211

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

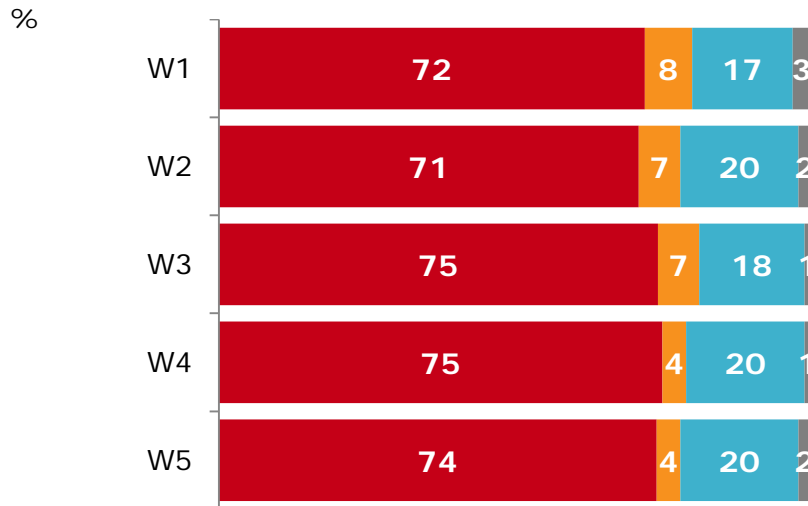
Q5. In which borough do you live?

Base: Casual users living in London: W1: 728; W2: 694; W3: 794; W4: 678; W5: 681

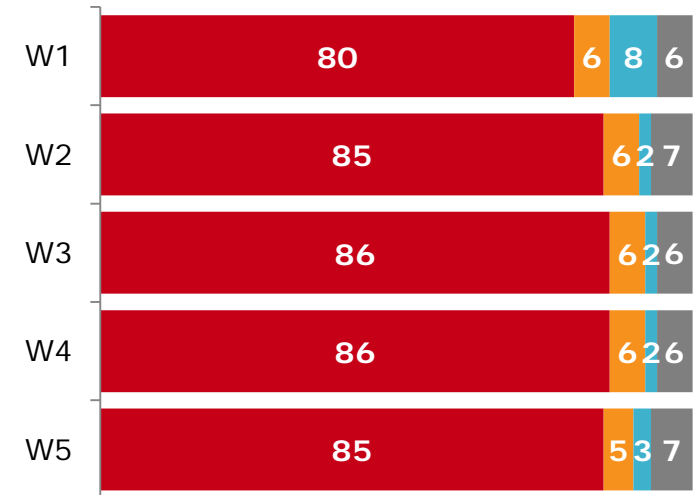


Reflecting their different age profiles, there are more full time workers among members and more students among casuals – consistent with previous waves.

Casual users



Members



■ Full time ■ Part time ■ Student ■ Other

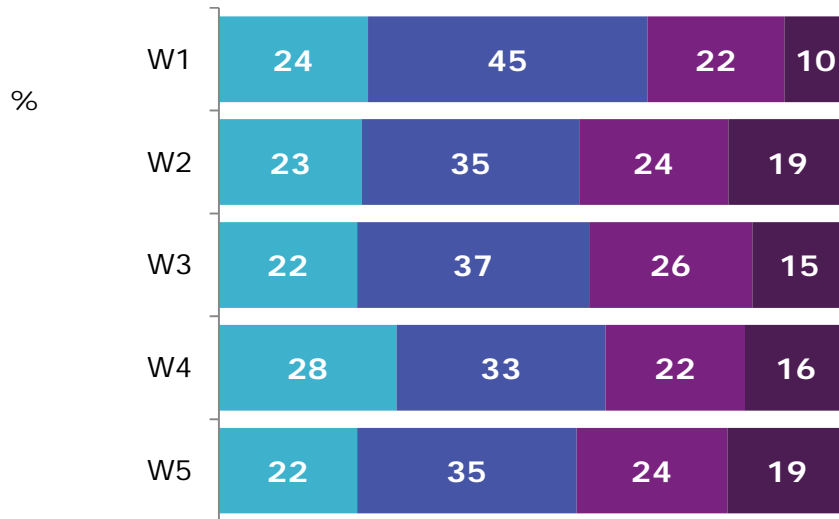
Q27. Are you...? / QK4. Are you?

Base: Casual users W1: 1111; W2 1109; W3 1179; W4 1051; W5 1022 members W1: 4789; W2: 3717; W3: 2998; W4: 2935; W5: 2266

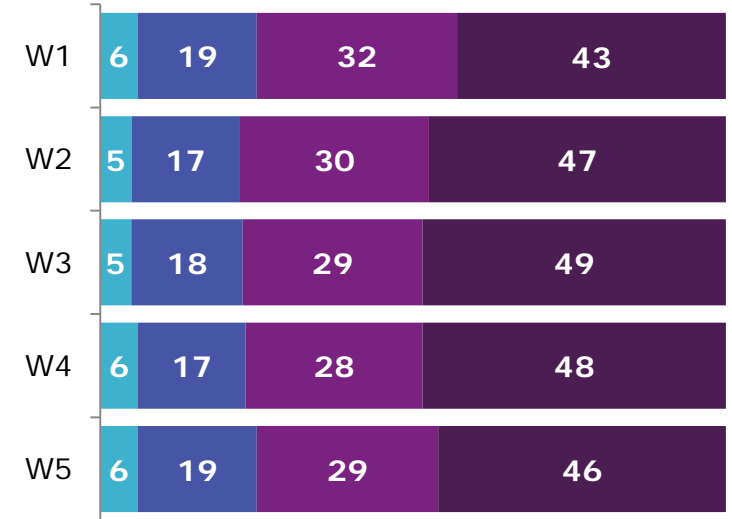


Reflecting their age profiles, casual users generally have lower incomes than members; over a fifth have a household income of less than £20k, compared to just 6% of members.

Casual users



Members



■ < £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; W5: 689 members W1:2164; W2: 2907; W3: 2410; W4: 2339; W5: 1813

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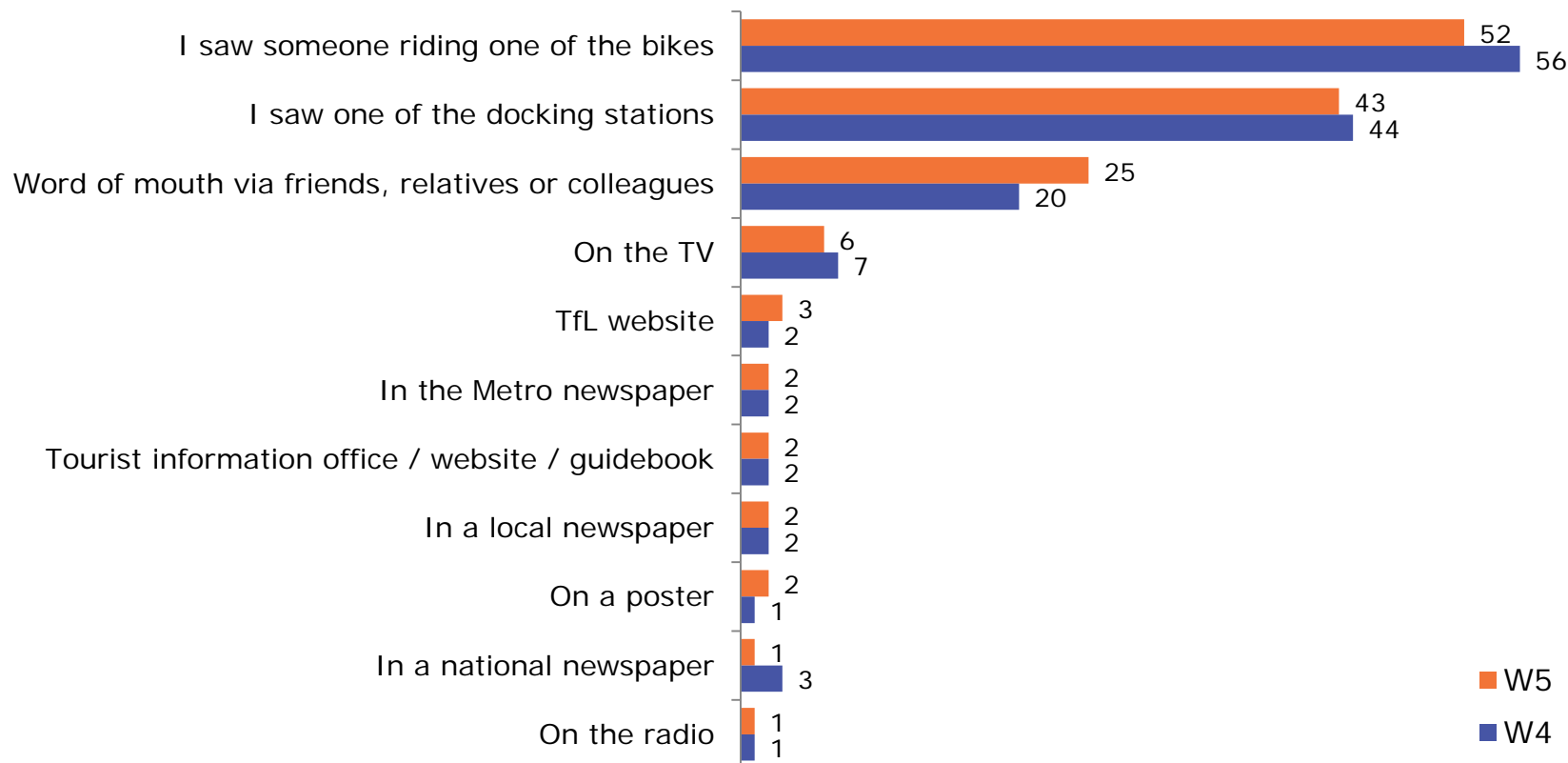


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How casual users use Santander Cycles

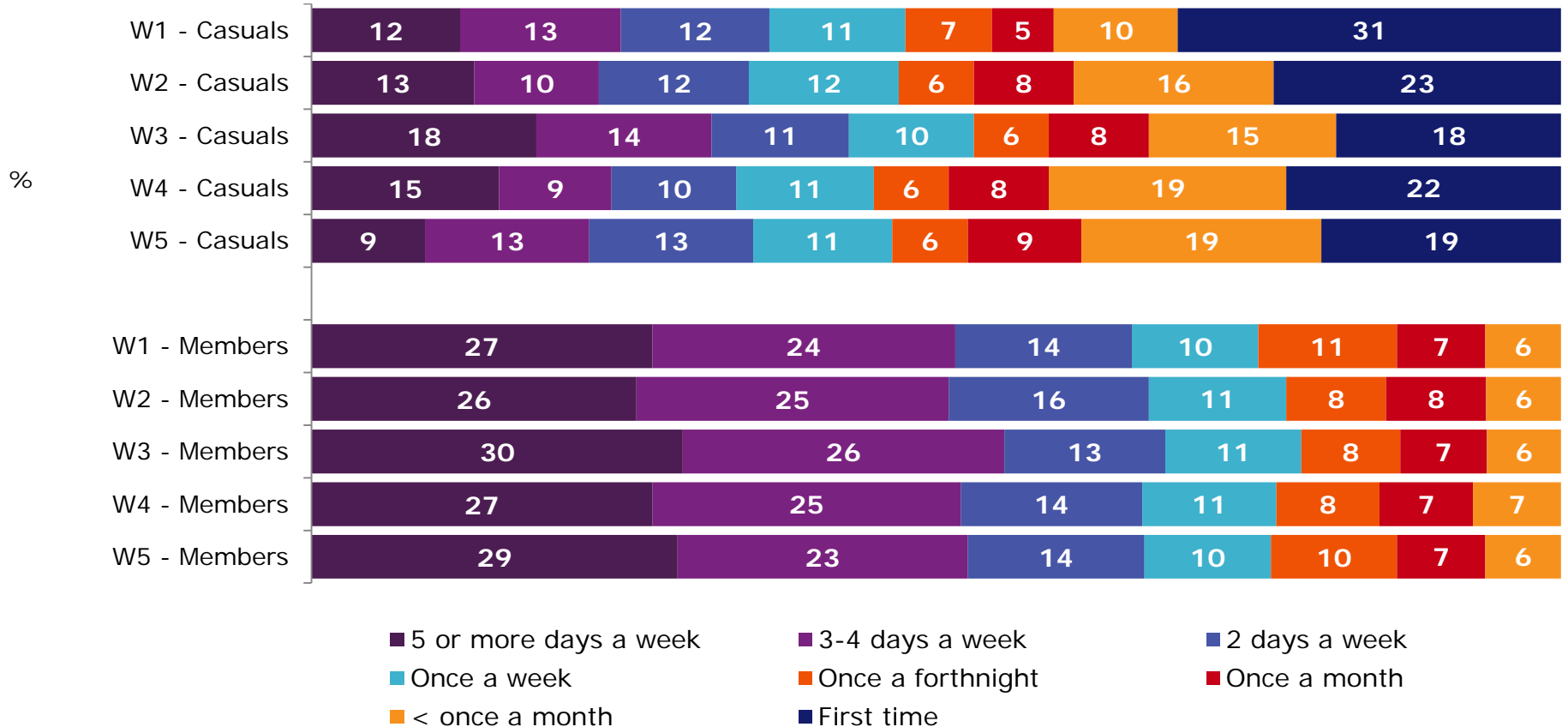


Word of mouth is up from 20% to 25%, the largest increase in how they heard about the scheme.



Q22.How did you first hear about the Santander Cycles scheme?
Base: Casual users W4: 1051; W5: 1022

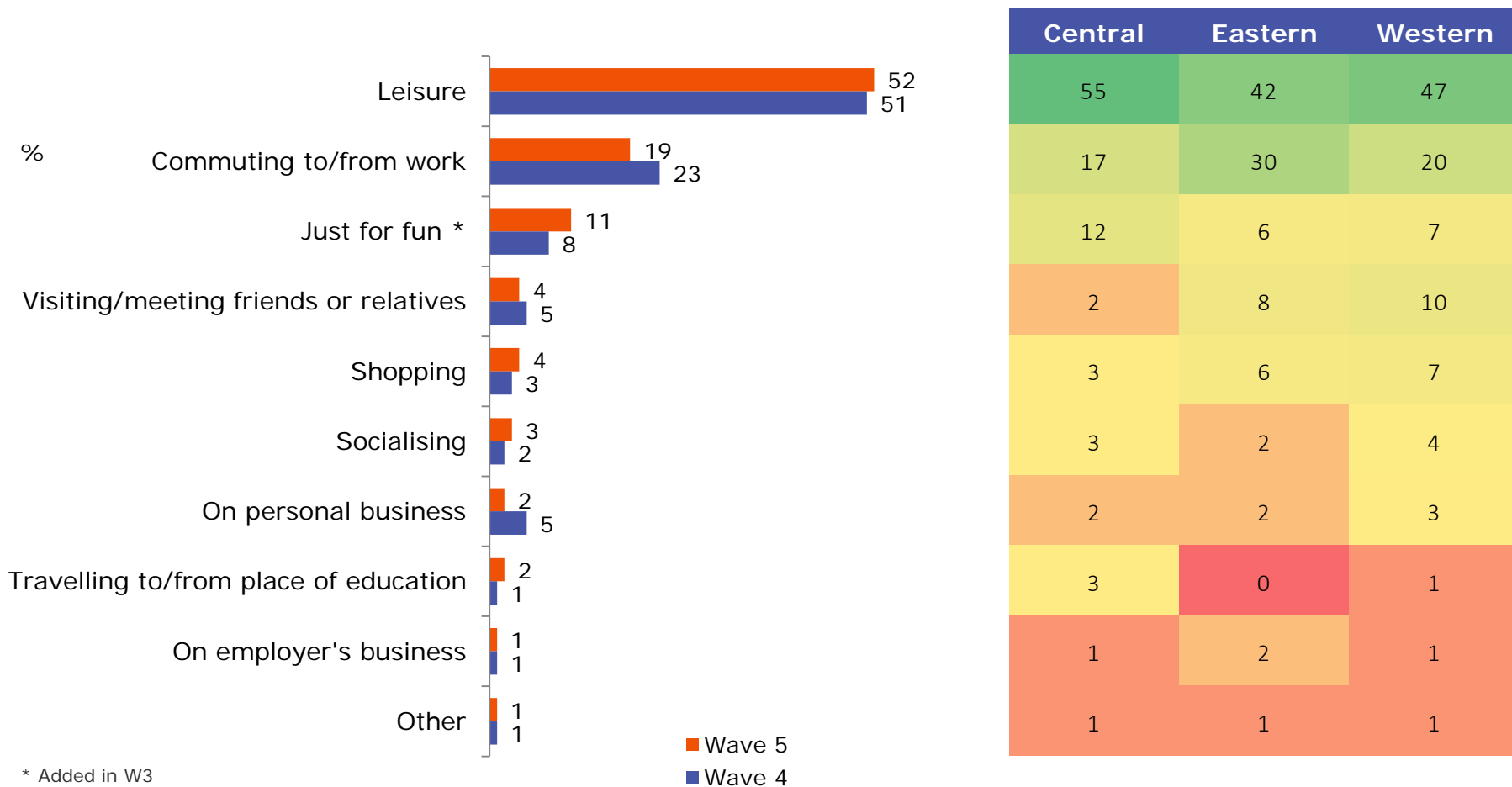
There are fewer first timers and fewer very frequent (5+ days per week) users – but more infrequent (2-4 days per week) users.



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: 1022 members W1: 4789; W2: 3717; W3: 2998; W4: 2801; W5: 2266 ©TNS



Leisure remains the main reason for using Santander Cycles, highest in the Central zone (55%). Commuting was relatively high in the Eastern zone (30%, compared to 20% or less elsewhere).



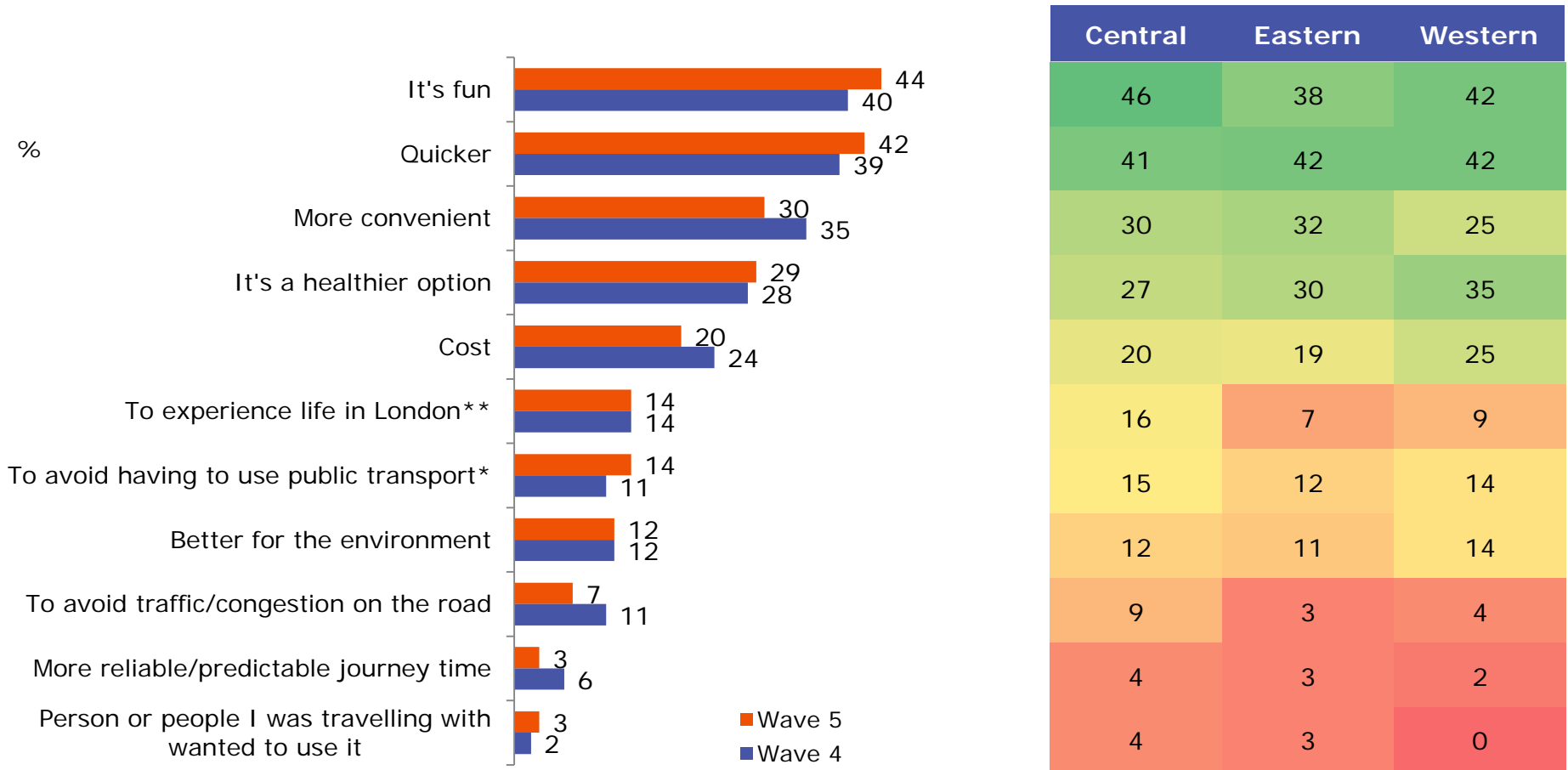
* Added in W3

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

Base: Casual users W4: All 1051 / W5: All 1022; Central: 642; Eastern: 169; Western: 211



Fun and speed, the key reasons choosing Santander Cycles for this trip, have both increased slightly since last wave, and avoiding traffic and cost have both declined slightly. Fun and experiencing London life are more important in the Central zone.



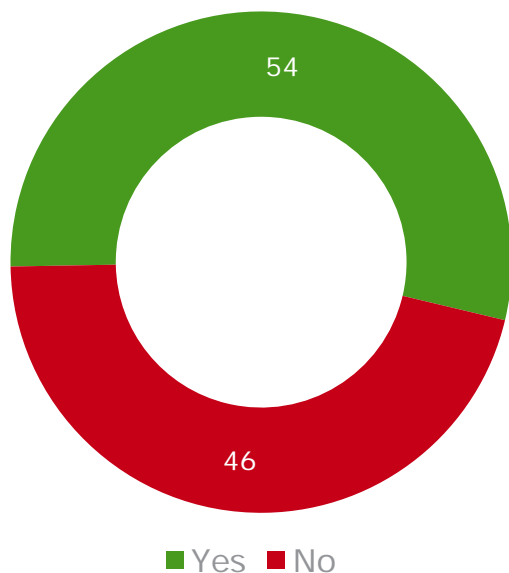
Q10. Why did you choose to make this trip using Santander Cycles?
 Base: Casual users W4: All 1051; W5: All 1022 Central: 642; Eastern: 169; Western: 211



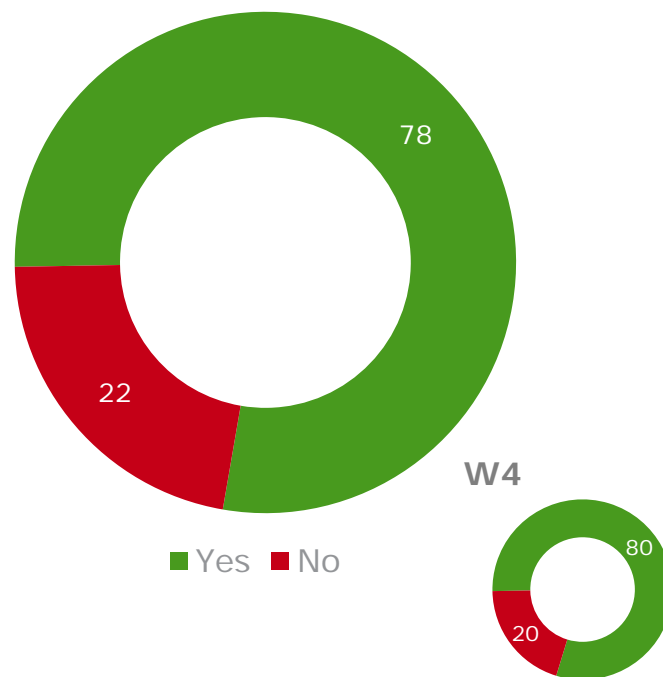
Just over half of casual users are aware of the Santander Cycles app. Almost eight in ten UK residents who use the scheme at least fortnightly are aware of Santander Cycles membership.

Are you aware of the Santander Cycles App?

%



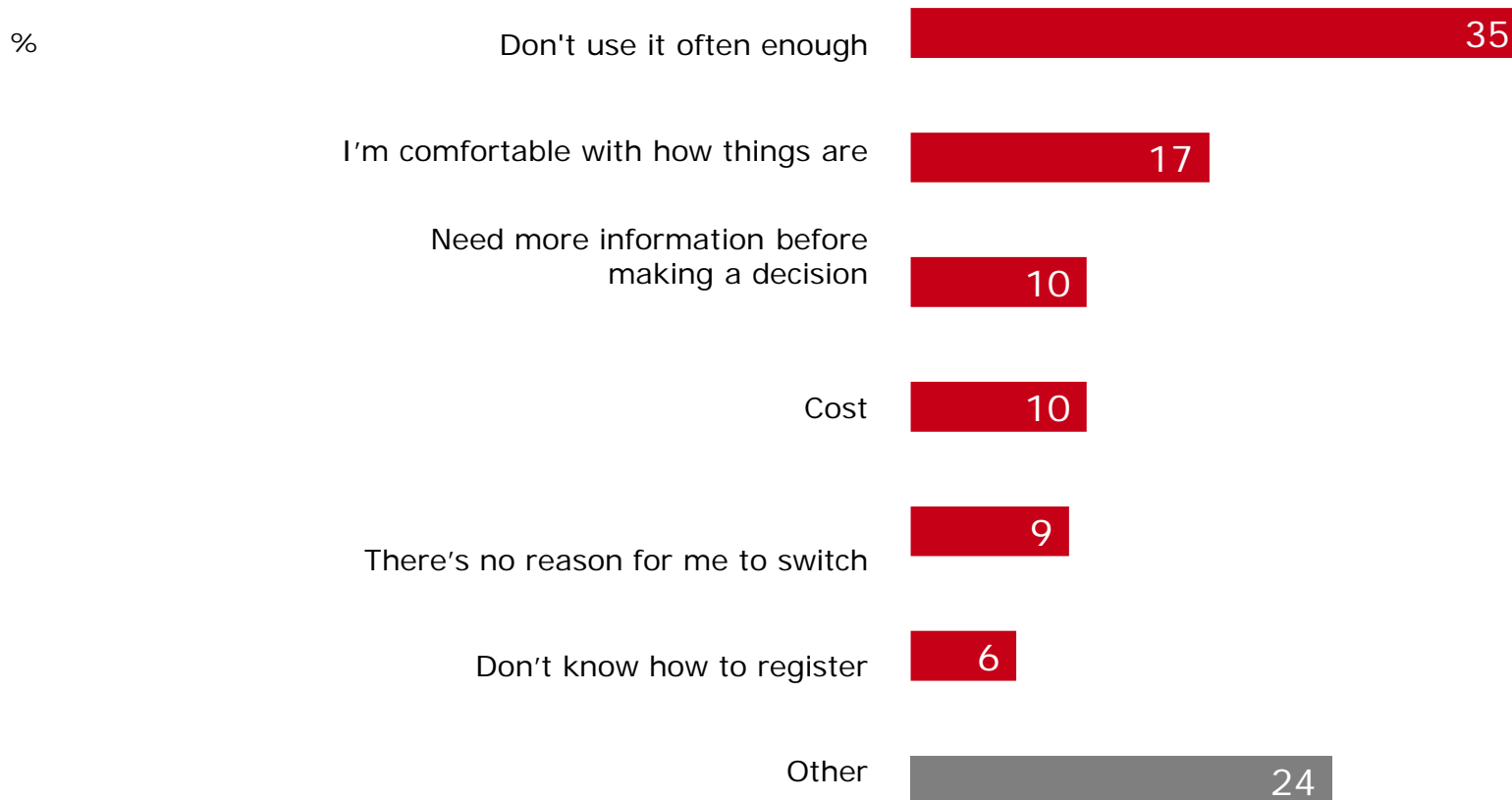
Awareness of membership
(among UK residents using Santander Cycles at least once a fortnight)



Q37. Are you aware of the Santander Cycles app? Base: Casual users W5: 1022

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: W4: 476; W5: 464

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.

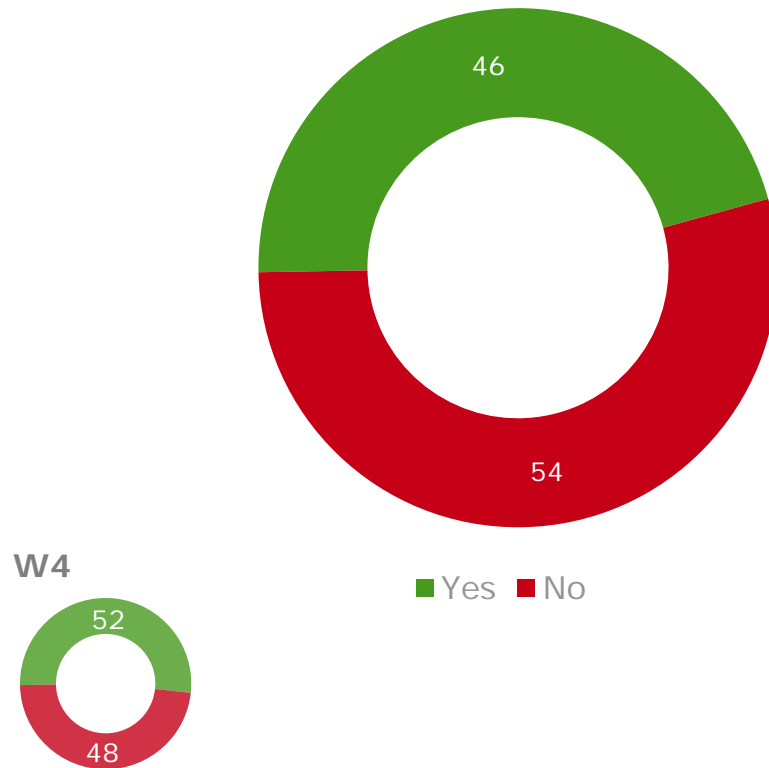


Q38. What are the factors stopping you from registering as a member? Base: All those aware that registering as a member gets you a key: W5: 360

Just under half of all casual users own a bicycle, (46%, down from 52% last wave).

Ownership of a bicycle (among all casual users)

%



Q24. Do you own a bicycle? Base: Casual users: W4: 1051; W5: 1022