

CoMoUK Annual Bike Share Report

UK

2022



Contents

2022 key findings.....	3
Foreword.....	4
Methodology.....	5
Demographic of bike share users.....	6
Potential to attract new cyclists.....	7
More cycling leads to healthier and more equal communities.....	8
Increase in cycling trips.....	8
Physical and mental health benefits.....	9
Economic and social benefits.....	10
Trip purpose.....	12
Bike sharing is a motor for mode shift.....	13
Boosting efficient transport.....	15
Multi modal trips.....	16
E-bikes, specialised bikes & inclusivity.....	16
Consistently high demand for micro-mobility and specialised bikes.....	18
User satisfaction.....	19
Next steps.....	20



BIKE SHARE MOTIVATES PEOPLE TO PICK UP CYCLING



53%

of bike share users started cycling again after at least one year

7%

used bike share to cycle for the first time ever

BIKE SHARE SERVES AS AN ESTABLISHED MODE OF TRANSPORTATION



35%

use it for commuting at least once a week

BIKE SHARE INCENTIVISES MORE FREQUENT CYCLING



66%

of users have been cycling more frequently since joining a bike share scheme

BIKE SHARE IS PART OF MULTI MODAL TRIPS



64%

of users combine bike share with other means of transport, mainly with bus or train rides

BIKE SHARE INCREASES LEVELS OF PHYSICAL ACTIVITY



84%

of users agree that bike share provides them with exercise

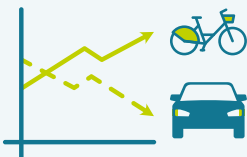
BIKE SHARE IS A COST EFFICIENT WAY OF TRAVELLING



61%

of users agree that bike sharing saves them money

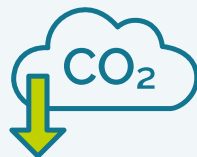
BIKE SHARE REDUCES CAR USE



37%

would have made their most common bike share trip by car (as driver, passenger, or by taxi or hire vehicle), had bike share not been available

BIKE SHARE REDUCES CARBON EMISSIONS



71kg

of CO₂ emissions are reduced on average by every bike share user each year as a result of the mode shift caused by shared bikes

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 seventh annual report. It provides new evidence for the positive environmental, economic and social effects of bike share schemes on individuals and communities.

Bike share re-attracts people into cycling, supports health and wellbeing, triggers sustainable travel behaviours, cuts car miles and presents an affordable travel option.

One-third of bike share users in the UK, for example, use shared bikes to cycle for the first time ever or for the first time in five years or more. Two-thirds of bike share users say that they have been cycling more frequently since joining a bike share scheme.

By the end of September 2022, 43 locations in the UK were served by bike share schemes, counting London as one location. This compares to 39 locations in 2021.

The number of e-bikes that are available via bike share schemes in the UK has multiplied since our last report. While there were close to 5,000 e-bikes available in September 2021, this number has grown to almost 12,000 e-bikes in 2022. E-bikes

are now available as part of 12 e-bike-only share schemes and as part of 13 mixed (pedal and e-bike) schemes across the UK.

Bike share schemes in the UK recorded close to 20 million hires per year (between September 2021 and September 2022). This equals an average of 54,285 rides per day.

This report is structured as follows. First, it gives an overview of the methodology used in gathering the presented data. Second, it presents key demographic indicators of bike share users. Third, the main part of the report zooms in on several aspects of bike sharing in the UK such as its potential to attract new cyclists and its positive economic, social and environmental impacts. Fourth, this report includes a dedicated section on e-bikes and other specialised bikes. The report concludes with findings on user satisfaction and an outlook to future developments and challenges for bike sharing in the UK.



HumanForest, London

Methodology

The CoMoUK annual bike share report is produced by CoMoUK, the charity dedicated to the social, economic and environmental benefits of shared transport. It is compiled in conjunction with accredited UK bike share operators and receives feedback from local authority representatives and operators. A questionnaire was distributed via email and social media to members of UK bike share schemes between the 22 August and 24 October 2022. All respondents were entered into a prize draw with a chance to win one of five high street vouchers.

Some of the operators offered additional rider credit and prizes to survey respondents. Operators also provided CoMoUK with statistics on membership numbers, bike fleets and other indicators to highlight the latest trends in the sector. When referring to data provided by operators, this is made explicit throughout this report.

100 responses to our survey were excluded from our analysis due to validity concerns or lack of consent, leading to a total of 2,824 valid responses. Respondents had the option to skip individual answers, and there was some routing, leading to varying response rates across survey questions. Unless otherwise stated, the percentages presented in this report are calculated as the share of all responses to a question, excluding those who skipped a question. Percentages were rounded to integers, so the sum of percentages for some questions might deviate from 100%.

Our sample includes 2,233 active users of bike share schemes: that is, users who have already hired a bike through the scheme since they joined it. These numbers compare to 1,308,007 users in the UK who, according to operators, have used, joined or renewed membership in a bike share scheme in the 12 months before 30 September 2022. The non-users who completed the bike share survey were not asked about their use of the scheme, but were redirected to questions about more general travel behaviour and attitudes on transportation. Similarly, bike share users who had only rented conventional pedal bikes were not asked specific questions about e-bikes or cargo bikes.

The number of responses in our survey from each location does not reflect the size of the bike share schemes. Users from London and other bigger cities are underrepresented. While this affects the representativeness of our overall sample, it also avoids the larger schemes dominating all the results, and means that findings from the survey are likely to hold true across a wider range of schemes. These are the ten locations with the highest absolute number of respondents:

Locations	Number of respondents
London	11% (305)
Exeter	10% (266)
Birmingham	9% (241)
Leicester	8% (209)
Bournemouth	7% (183)
Norwich	6% (167)
Coventry	5% (131)
Glasgow	5% (125)
Dundee	4% (112)
Greater Manchester	4% (105)

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

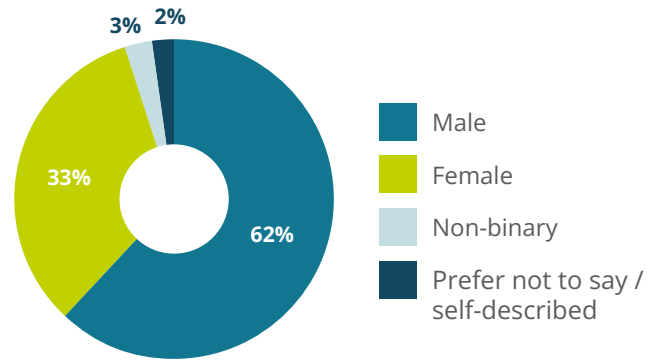


OVO Bikes (nextbike), Cardiff

Demographic of bike share users

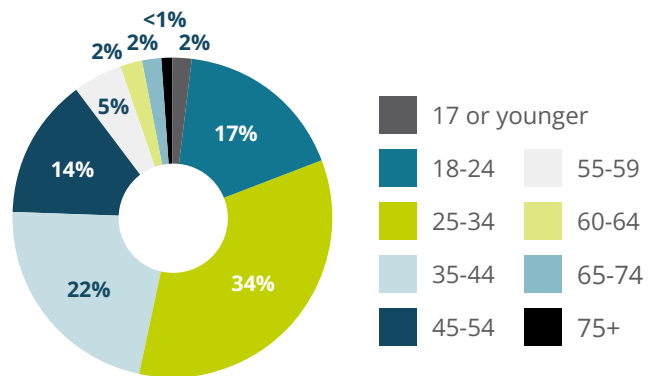
Gender

There is a marked gender difference in the utilization of bike share schemes. In 2022, 62% of all respondents were male, 33% were female, 3% were non-binary and 2% preferred not to answer or self-described. This gender difference is also reflected in the 2021 National Travel Survey for England where men are reported to have made more than three times as many trips by pedal bike per year as women.¹



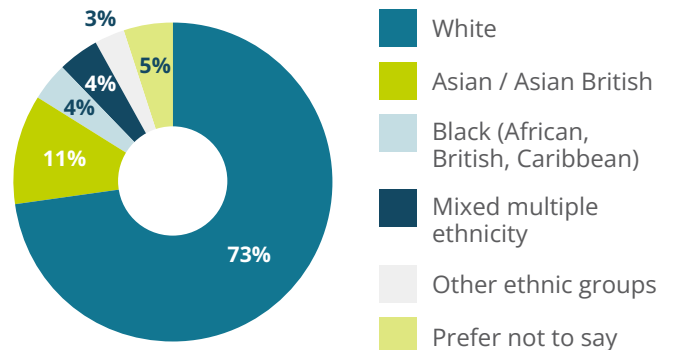
Age

Bike sharing is used across all age groups. Around a third of users (34%) are aged between 25 and 34, which makes this the largest cohort of bike share users. All age groups under 35 combined represent a majority of bike share users (53%). However, age groups 35-44 and 45-54 make up 22% and 14% of the bike share usership, respectively. Users aged 55 and over constitute 10% of all bike share users.



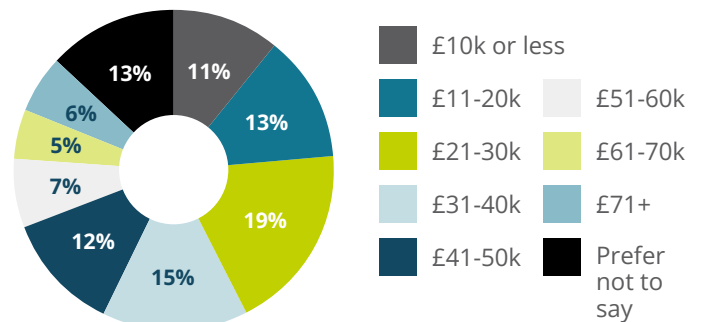
Ethnicity

The percentage of respondents who identified as White was 73%, whilst 11% identified as Asian / Asian British; 4% as Black (African, British, Caribbean); 4% as "mixed / multiple ethnicity"; and 3% as other ethnic groups (with the remainder 'prefer not to say'). According to the 2021 Census, equivalent figures for England and Wales were 82%; 9%; 4%; 3% and 2% respectively.² This suggests that bike share schemes are attracting a relatively diverse group of users, compared to Britain's general population.



Income

Responses were received from all income groups. Almost a quarter of respondents (24%) were from low income groups with a gross annual income of £20,000 or less. This demonstrates that bike sharing, like other forms of micro-mobility,³ can provide improved access to mobility for socioeconomically disadvantaged communities.



1 2021 data suggests 24 bike trips p.a. for men and 7 for women. <https://www.gov.uk/government/statistical-data-sets/nuts03-modal-comparisons#mode-by-age-and-gender>

2 <https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/ethnicity/bulletins/ethnicgroupenglandandwales/census2021> Ethnic group, England and Wales - Office for National Statistics (ons.gov.uk)

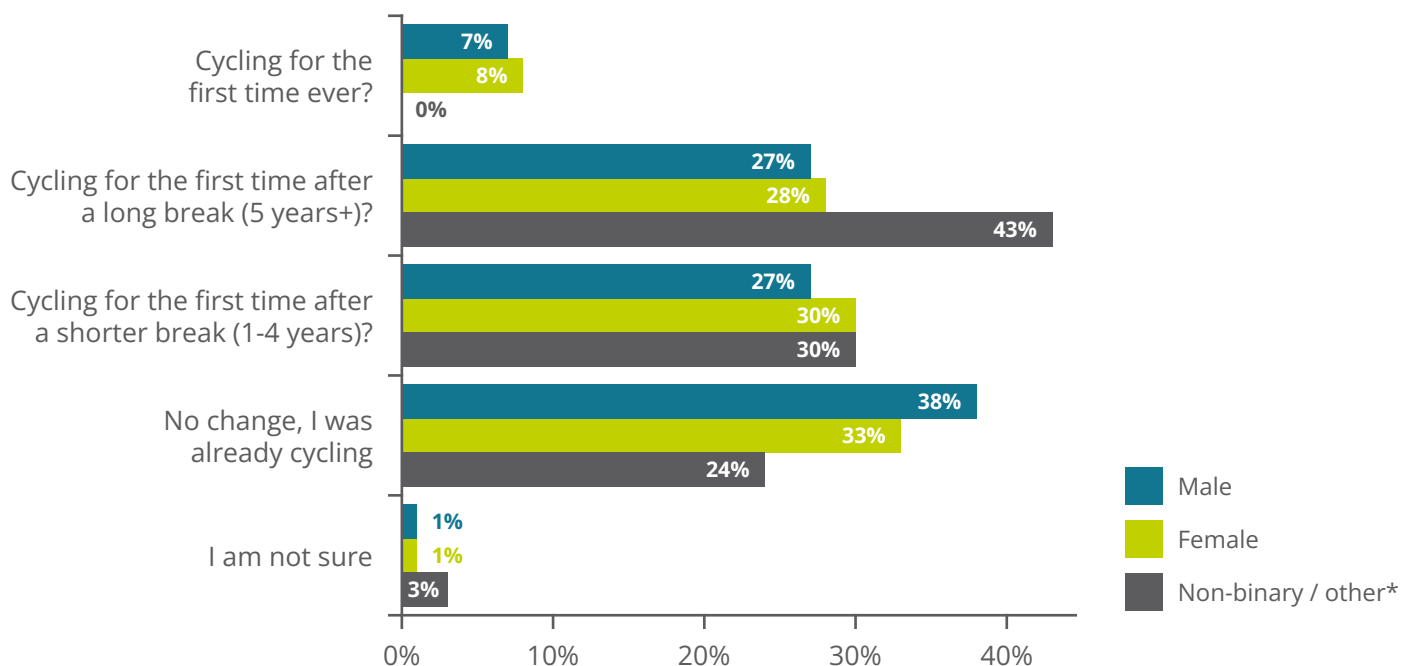
3 <https://www.gov.uk/government/publications/national-evaluation-of-e-scooter-trials-report>

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 2022, 60% of respondents (49% in 2021 and 55% in 2020) said that joining the scheme was a catalyst to them cycling for the first time in at least a year or ever. This

included 26% of people who hadn't ridden for 5 years or more, and 7% who were new to cycling. Meanwhile, the number stating that they were already cycling was 38% (51% in 2021 and 45% in 2020). About 1% of respondents answered 'not sure' to this question.¹

Did hiring a bike in the bike share scheme lead to you...



* Results included for completeness, but small sample size means that they may not be representative

A higher percentage of women are incentivised to pick-up cycling again after a break of one year or more (66%), compared to men (61%).

Our qualitative data suggests one reason that could explain the higher rate of re-engagement with cycling among non-male users, thanks to bike sharing. Specifically, women are significantly more likely to conduct trips that combine multiple stops and purposes ("trip-chaining")² and several female respondents commented on the

value of using bike share to accommodate such complex travel patterns:

"To and from the nursery to my workplace, I always hire an e-bike every day. I can't buy a cycle due to my nursery trip, and not feeling safe enough cycling with my son, but this is so convenient for me."

Female user from Leicester, 25-34

1 Note that numbers in this paragraph include respondents who skipped the gender question, and therefore don't match entirely to those in the table.

2 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/509447/nts-trip-chaining.pdf

More cycling leads to healthier and more equal communities

Increase in cycling trips

Bike share schemes increase the amount of times that people cycle, improving users' physical and mental health and connecting communities in environmentally friendly ways. Two-thirds of respondents (66%) stated that they have been cycling more often (40%) or much more often (26%) since they joined a bike share scheme. Among those who have hired an e-bike as part of a bike share scheme, 33% claim to be cycling much more often than before joining the scheme and 36% of e-bike users cycle more often (a total of 69%).

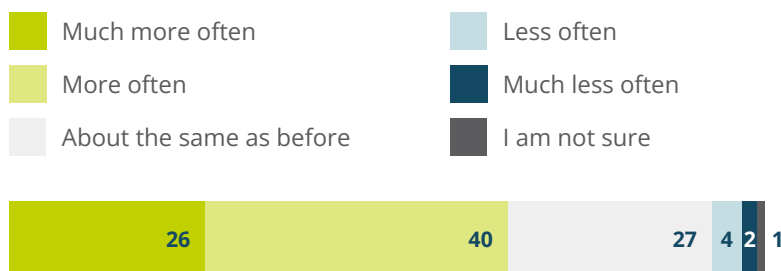
BIKE SHARE INCENTIVISES MORE FREQUENT CYCLING



66%

of users have been cycling more frequently since joining a bike share scheme

Since joining the bike share scheme, do you now cycle...? (values in %)



West Midlands Cycle Hire (Serco)

Physical and mental health benefits

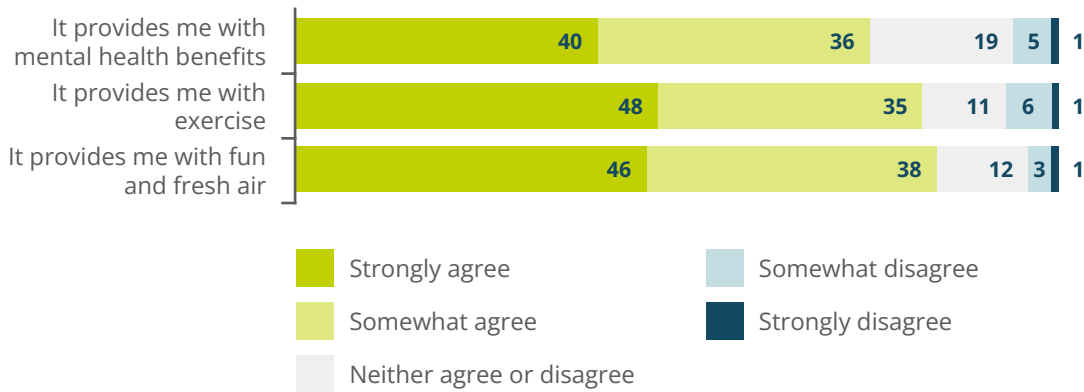
When asked about the benefits of bike share schemes, the statement that most respondents agreed with (either strongly, 46%, or somewhat, 38%) was that bike sharing provides them with exercise. Overall, 84% of respondents agreed with this statement. 1% strongly disagreed, 3% somewhat disagreed and 12% neither agreed nor disagreed.

Regarding mental health, 40% of respondents strongly agreed and 36% somewhat agreed with the statement that bike share provides them with mental health benefits. In other words, more than three-quarters of bike share users report a positive impact on their mental

health. This share increases when singling out those respondents who have used an e-bike as part of a bike share scheme. 45% of all e-bike users strongly agree and 35% somewhat agree with the statement on bike share’s positive mental health impact. Similarly, 83% of all respondents agreed (strongly or somewhat) that bike sharing provides them with fun and fresh air.

Hence, bike share schemes can help local authorities, employers and other stakeholders to realise Health in All Policies (HiAP) and to create social value benefits, by improving the health and wellbeing of individuals.

How far do you agree with the following statements about how bike share helps you personally? (values in %)



BIKE SHARE PROVIDES SUBSTANTIAL MENTAL HEALTH BENEFITS



76%

of users agree that that bike share provides them with mental health benefits



Beryl

Economic and social benefits

The economic benefits provided by bike share schemes were also widely acknowledged among users. 30% of respondents strongly agreed with the statement that bike sharing saves them money, and 31% somewhat agreed, leading to overall agreement with this statement by 61% of respondents. 21% neither agreed nor disagreed, 13% somewhat disagreed and only 6% strongly disagreed.

In locations where more than one bike share scheme are available, price was the second most mentioned reason for choosing a particular scheme (mentioned by 30%), only surpassed by availability (mentioned by 39%).

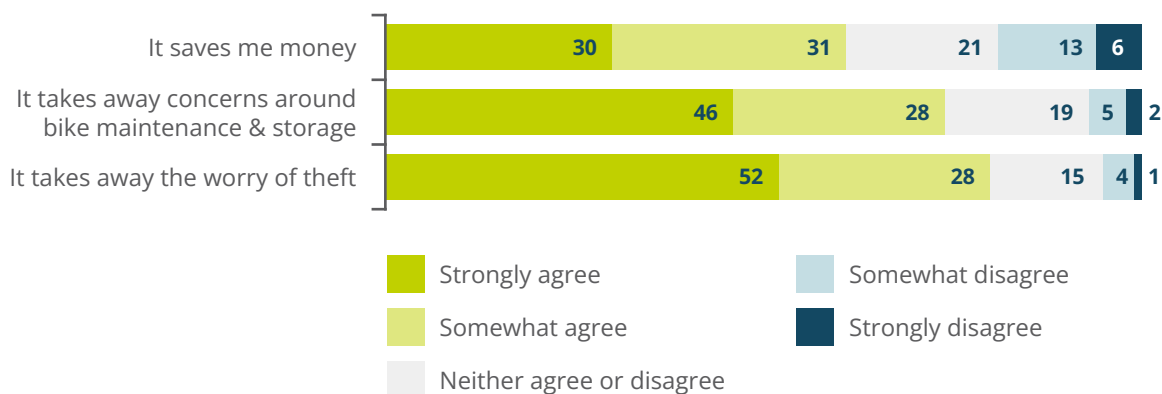
These findings indicate that bike sharing is an inclusive travel option that helps overcome economic barriers to accessing mobility.

"It's the most convenient form of transportation and, as I am a fresher, it also helps me save money for travelling and is also a fast mode of travelling."

Male user from Worcester, 18-24

Bike share schemes also collectivise the costs and risks linked to the usage and ownership of privately owned bikes. This particularly supports individuals who are unable or unwilling to bear these costs and risks themselves. 52% of respondents, for instance, strongly agree with the statement that bike sharing takes away the worry of theft, whilst 28% somewhat agree with this. Similarly, bike share takes away concerns around bike maintenance and storage for a vast majority of users: 46% of respondents strongly agree and 28% agree with this statement.

How far do you agree with the following statements about how bike share helps you personally? (values in %)



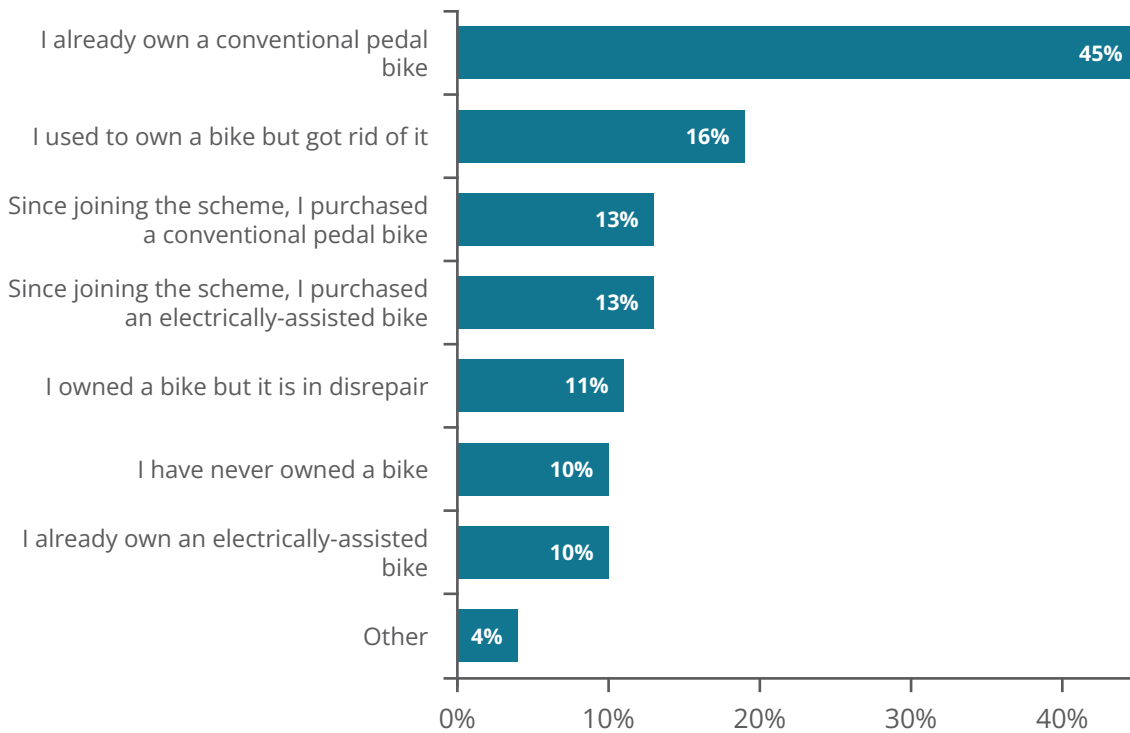
"I already cycle but the scheme allows me to travel where I would be reluctant to leave my bike for fear of theft."

Male user from Leicester, 45-54

However, in many instances, the use of bike share schemes and individual ownership of bikes are complementary rather than mutually exclusive. In a question where people could choose more than one option, 45% of respondents

stated that they already owned a pedal bike when they joined the scheme, whilst 10% already owned an e-bike. Furthermore, bike sharing may lead some people to purchase their own bike. 13% of respondents stated that they had bought a pedal bike since joining a bike share scheme, whilst an equally big proportion had bought an e-bike since joining. Only 16% got rid of a bike, 10% have never owned a bike and 11% own a bike that is in disrepair.

Please tell us about your current bike ownership



The complementary nature of participating in bike sharing and owning one's own bike is also evidenced by the 76% of survey respondents who strongly agreed or somewhat agreed with the statement that they can rely on bike sharing as a back-up, and by the 66% of respondents who strongly or somewhat agree that bike sharing makes their trips more reliable. Some respondents also pointed towards the social aspect that bike sharing provides them with, thanks to being able to cycle

with people who do not have their own bike:

"The scheme is really useful for when my son comes home, because we have no storage space for a second bike and it means we can just grab a bike as and when."

Female user from Cardiff, 45-54



VOI

Trip purpose

Bike sharing is used for diverse purposes. The most common regular purpose for trips made with shared bikes is commuting and work-related travel. 35% of respondents claim to use bike sharing for this purpose at least once a week. This includes 16% of respondents who use bike sharing at least three times per week for this purpose. In total, 62% of respondents use bike sharing at least once a month for their commute or work-related travel (including more frequent users). Other functional purposes, such as using bike sharing to access shops, doctors or entertainment facilities like cinemas are also very common, with 24% of respondents using bike sharing for these purposes at least once a week and a further 33% doing so at least once a month.

"I enjoy taking a bike to work across the city, especially when I'm late and I would otherwise get a taxi. Taking a bike is more enjoyable, cheaper, and actually quicker than sitting in the taxi in traffic!"

Female user from Manchester, 25-34

A majority of respondents also use bike share schemes at least once a month for leisure or social activities. 56% use the schemes for pleasure or exercise at least monthly, including 27% doing so at least once a week. 52% of respondents also

state that they use bike sharing at least once a month to visit friends and family, including 24% who use it for this purpose at least once a week.

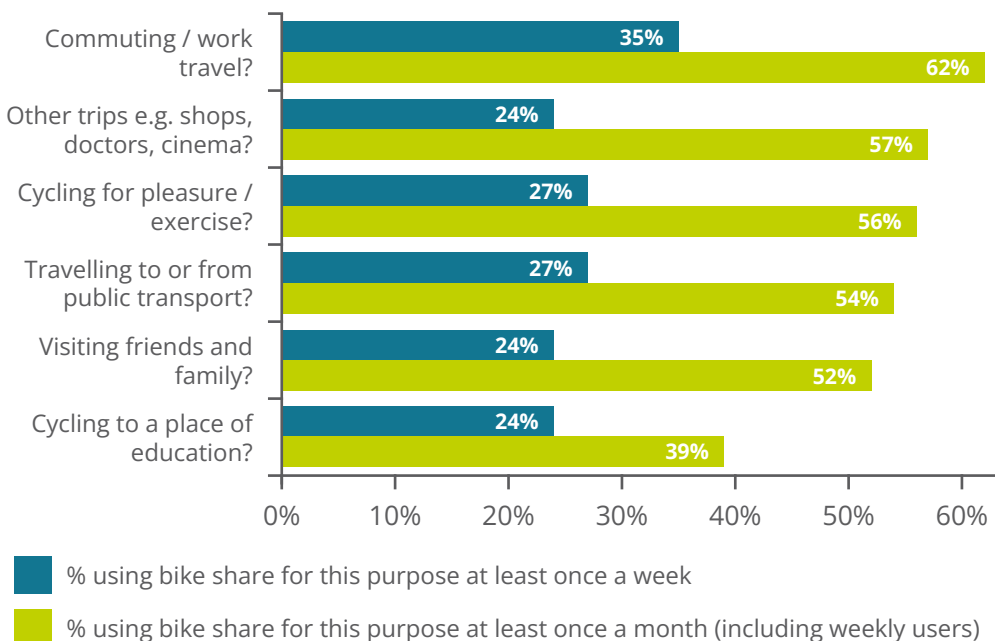
These findings demonstrate that bike share schemes are an established means of accessing sites of economic activity and social interaction. Hence, they create social value by fostering community cohesion and by supporting the economic recovery post-pandemic.

Social value

The social value of public services is determined by their contribution to economic, social and environmental wellbeing. Public sector organisations and their providers in all UK nations are legally obliged to consider the social value of the services that they provide. Bike sharing can foster each dimension of social value by providing affordable, socially inclusive and sustainable access to mobility.

What is more, bike sharing is regularly (at least monthly) used by a majority of respondents (54%) to access public transport, indicating bike sharing's wider potential to support individuals making sustainable travel choices.

How often do you use bike sharing for...?



Bike sharing is a motor for mode shift

Bike sharing replaces many trips that would otherwise have been made by car. Consequently, bike sharing schemes can play a key role in achieving policy goals that include a reduction in car mileage, such as the Scottish Government's commitment to reduce car kilometres by 20% by 2030.¹

When asked which mode of transport survey respondents would be mostly likely to use for their most common trip if bike share wasn't available. 37% chose the car, either as the driver (21%) or passenger in a privately owned vehicle (6%), or by using taxi or private hire vehicle (10%).

This percentage is higher than the combined share of all responses that indicate that a means of public transport would have been replaced: 15% of respondents would most likely take a bus instead of bike sharing, 9% a train, 7% an

underground, light rail or tram and 4% other public transport options like park and ride or employer shuttles. 15% would most likely walk instead of bike sharing, 10% would use their own bike and 2% would use an e-scooter. Only 1% claimed that they wouldn't do the trip.

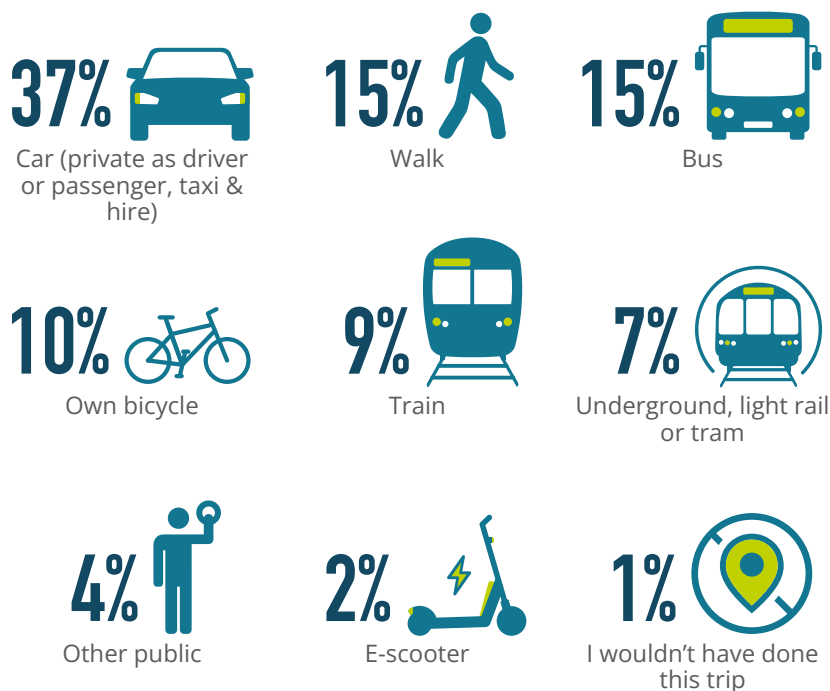
"I have swapped my car journeys to work with the bike hire scheme. This is helping to improve my health with small steps that I'm able to maintain"

Female user from Exeter, 35-44

"It's a great way to get about and avoids having to take the car into the city centre"

User from Coventry, gender and age unknown

Which mode(s) of transport would you be most likely to use for your most common trip, if the bike share scheme was not available? Please choose just one main mode.



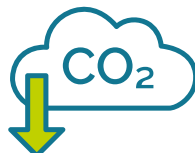
¹ <https://www.transport.gov.scot/media/50872/a-route-map-to-achieve-a-20-per-cent-reduction-in-car-kms-by-2030.pdf>

The mode shift brought about by bike sharing was also assessed by asking respondents "How many miles a week, previously taken by car or taxi, have been replaced by use of the bike share scheme, if any?". 28% of respondents reported that they had not replaced any car or taxi trips. 29% of respondents stated that they replaced up to five miles per week; 21% replaced between 5 and 10 miles; 13% replaced between 10 and 15; 6% replaced more than 15 miles. 3% indicated 'other'.

Based on these numbers, we estimate that each bike share user who replaces car trips with bike sharing, reduces their car mileage on average by 7.2 miles per week, and that, averaged across the sample as a whole, there is a reduction of 5.0 car miles per week per bike share user.¹ This equates to a 7.4% reduction in the typical mileage travelled by car by the average person, given that, in 2021, the average person in England travelled 3,483 miles in a private car or taxi;² or, potentially, an annual

reduction of CO₂ emissions of 71kg, given that an average car in the UK emits 0.275kg CO₂ per mile.³ While there are numerous limitations to this crude estimate, the overall finding is clear: bike sharing is playing a fundamental role in a shift towards a more sustainable transportation system.

BIKE SHARE REDUCES CARBON EMISSIONS



71kg

of CO₂ emissions are reduced on average by every bike share user each year as a result of the mode shift caused by shared bikes



Tier

- 1 We calculate this using the mid-points of each range and conservatively assuming that >15 miles may average 17.5 miles per week, and assuming that those specifying 'other' did not replace any car miles.
- 2 Combined figure for car driver, car passenger and taxi use. <https://www.gov.uk/government/statistical-data-sets/nts03-modal-comparisons#mode-by-age-and-gender>
- 3 <https://www.gov.uk/government/publications/greenhouse-gas-reporting-conversion-factors-2022>

Boosting efficient transport

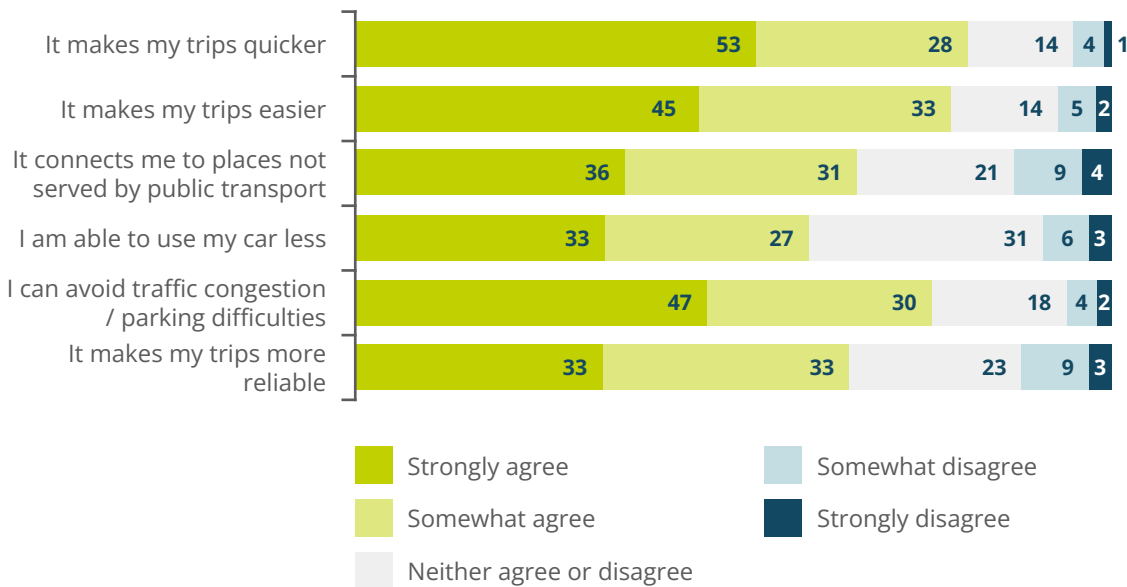
Bike sharing can have a transformative impact on how individuals travel. The efficiency of bike sharing, for instance, is acknowledged by a vast majority of users on several dimensions. 53% of respondents strongly agreed with the statement that bike sharing makes their trip quicker, whilst 28% somewhat agreed with this statement. Similarly, 45% strongly agreed and 33% somewhat agreed that bike sharing makes their trips easier. 33% each strongly agreed and somewhat agreed that bike sharing makes their trips more reliable.

Regarding the mode shift from car to bike, 47% strongly agreed and 30% somewhat

agreed that bike sharing helps them avoid traffic congestion/parking difficulties. These numbers are 33% and 27%, respectively for the statement that bike sharing means 'I am able to use my car less'.

Bike share schemes can also compensate for a lack of other available transport options and hence increase the overall capacity of a transport system. The statement that bike sharing connects users to places that are not served by public transport was strongly agreed with by 36% of respondents, and somewhat agreed with by 31%.

How far do you agree with the following statements about how bike share helps you personally? (values in %)



Dott

Multi modal trips

Bike sharing is frequently combined with other means of transport, adding flexibility and convenience to journeys. 64% of respondents reported that they

BIKE SHARE IS PART OF MULTI MODAL TRIPS



64%

of users combine bike share with other means of transport, mainly with bus or train rides

combine their most common bike share trip with other means of transport, whilst 36% do not. Of those reporting that they do combine their most common trip in a multiple choice question, respondents were most likely to state that bike share is used to connect with public transport. 23% of respondents stated that they combine their most common bike share trip with a bus, 22% with a train, and 10% with underground, tram or light rail. 4% of respondents reported combining their most common bike share trip with the use of an e-scooter, another mode that is currently only available as a shared transport option in England. 13% reported combining bike share trips with taxis, another 13% reported combining it with car driving, and 6% combined it with being a car passenger.

E-bikes, specialised bikes & inclusivity

The number of e-bikes in bike share schemes is increasing each year. There are now 13 schemes that include e-bikes as an option alongside pedal bikes and 12 which are purely e-bikes. Over the course of one year, the number of e-bikes in the UK's bike share schemes has more than doubled, from 4,835 in September 2021 to 11,696 in September 2022. In the same period, bike share operators recorded a total of over 6 million e-bike hires: this equals about 45% of all bike share hires in the UK. At a smaller scale, the number of e-cargo bikes that are included in UK bike share schemes is also growing. By the end of 2022, 33 e-cargo bikes were available via bike sharing.

More than half the respondents of our survey, 52%, have already hired an electric bike as part of a bike share scheme, whilst 13% have hired an e-cargo bike and an additional 8% have hired both electric and e-cargo bikes.

When asked for the reasons for renting an e-bike or an e-cargo bike (in a question that allowed for multiple answers), 48% of respondents claimed that this option reduced their journey time. Around a third of respondents claimed that e-bikes or

e-cargo bikes helped them tackle a number of physical barriers regarding cycling such as cycling up hills (36%), avoiding fatigue or getting sweaty (34%) or travelling longer distances (30%).

"I don't have an e-bike so hiring one is great fun!"

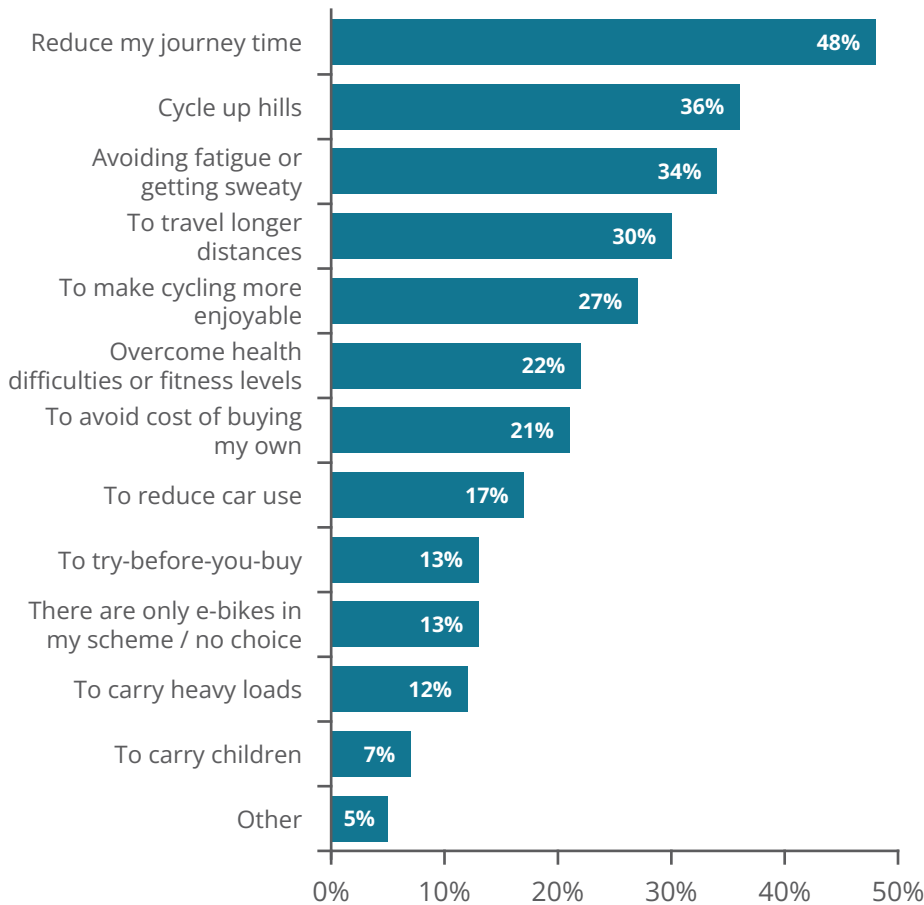
Female user from Leicester, 55-59

22% said that the choice of an e-bike helped them to overcome health difficulties or low fitness levels. 21% of respondents stated that using a shared e-bike or e-cargo bike helped them avoid the cost of buying such a bike. This demonstrates that e-bikes and e-cargo bikes in bike share schemes make cycling more inclusive, and can provide more equitable and affordable access to active travel options.

"It's nice to be able to use an electric bike if there are hills or you're tired"

Female user from Dundee, 25-34

Which of the following reasons apply for why you use electric bikes (e-bikes) and electric cargo bikes (e-cargo bikes)?
(Tick all that apply)



Consistent with the finding that e-bikes and e-cargo bikes help overcome physical barriers to cycling, these types of bikes also result in greater reductions in the amount of miles driven by car. The difference is particularly stark among respondents who claim to reduce between 5 and 15 car miles per week by using a bike share scheme. 39% of all those who have hired an e-bike and/or e-cargo bike say that their weekly car mileage reduction falls into this range, while this is only true for 19% of all pedal bike only users. Accordingly, the estimated reduction in weekly car miles per bike share user is substantially higher among e-bike and e-cargo bike users. For users of these bikes, the estimated average car mile reduction lies at 5.5 miles per week, whereas for pedal bike users it is estimated to be at 3.5 miles.¹

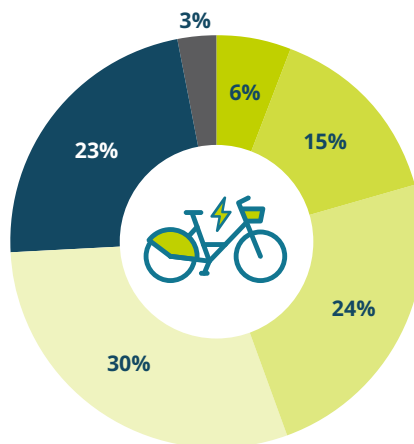


Cargo Bike Share (Beryl), Hackney

¹ We calculate this using the mid-points of each range and conservatively assuming that >15 miles may average 17.5 miles per week, and assuming that those specifying 'other' did not replace any car miles.

How many miles a week, previously taken by car or taxi, have been replaced by use of the bike share scheme, if any?

- More than 15 miles per week
- Greater than 10 and up to 15 miles per week
- Greater than 5 and up to 10 miles per week
- Up to 5 miles per week
- I have not replaced any car or taxi trips
- Other



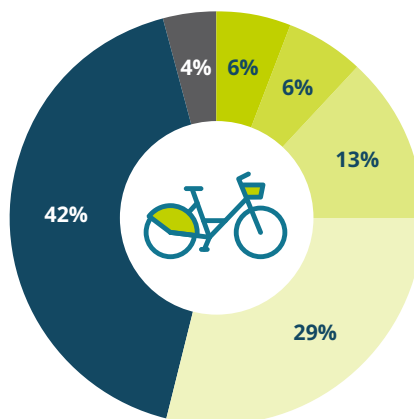
Users who have hired e-bikes or e-cargo bikes

E-BIKE USERS DRIVE EVEN LESS THAN OTHER BIKE SHARE USERS



5.5miles

is the average weekly vehicle mileage reduction per e-bike user after joining a bike share scheme, compared to 3.6 miles per pedal bike only user



Pedal bike only users

Consistently high demand for micro-mobility and specialised bikes

While the supply of e-bikes, e-cargo bikes and other specialised bikes has grown significantly in recent years, the demand for such bikes continues to be high. When asked if they would be interested in using specialised types of bikes, 61% of respondents stated that they would be interested in using an electric cargo bike for carrying shopping. 26% would be interested in using electric tricycles, 24% would be interested in electric two or three seater tricycles, 19% would be interested in hand powered cycles and 19% would be interested in electric cargo bikes for carrying children.

Simultaneously, trials for shared e-scooter schemes continue to run in multiple locations in England. Shared e-scooter were available in 50 locations across

England by late 2021. Of our bike share survey respondents, 38% stated that they have hired an e-scooter from a trial scheme, showing that multiple forms of shared transport and micro-mobility are mutually compatible for a substantial number of users.



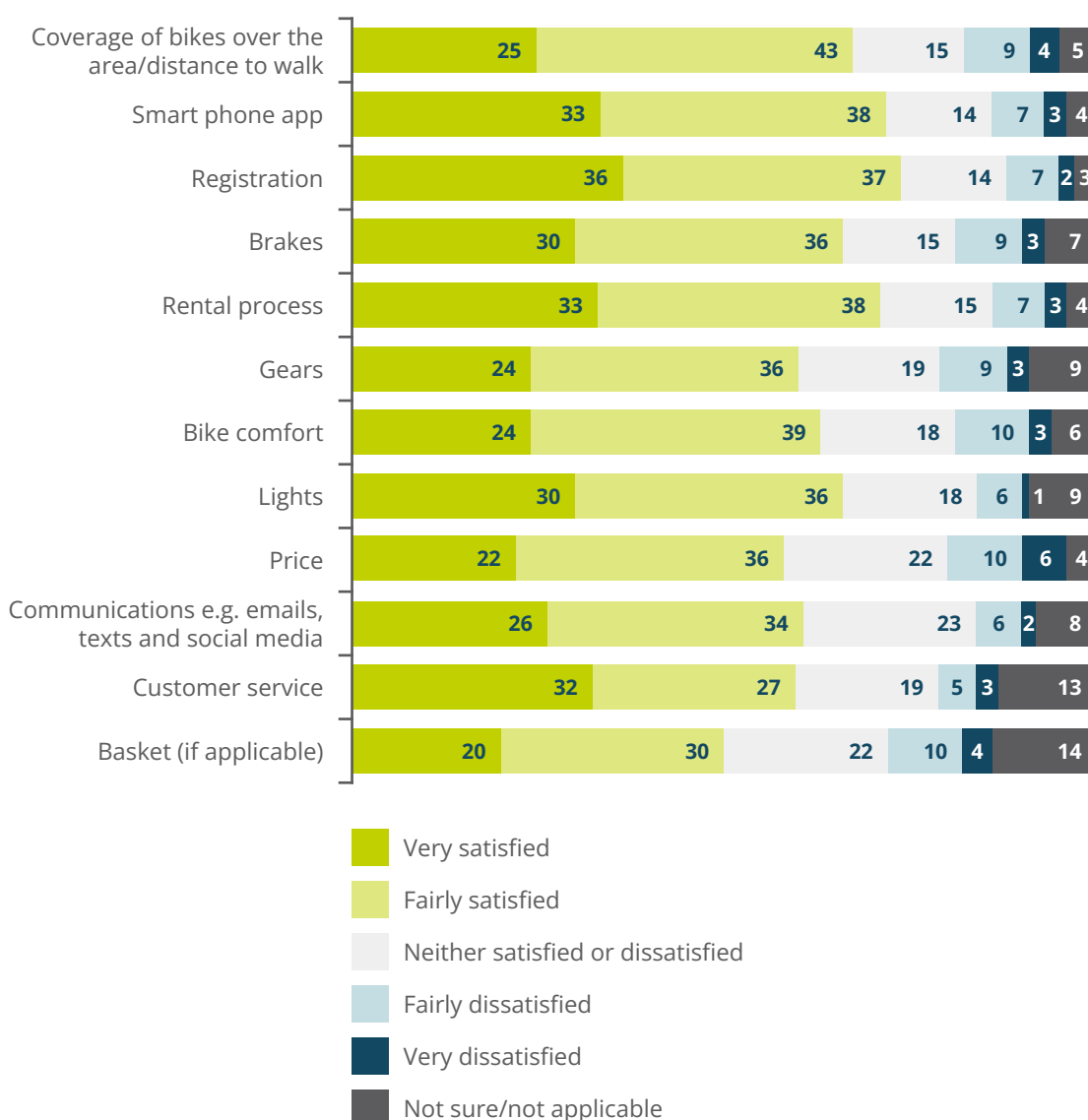
Lime adaptive bike

User satisfaction

The experience of bike share users has been overwhelmingly positive. For all aspects of user satisfaction included in the survey, a majority of users state that they are very satisfied or fairly satisfied. There is particularly high satisfaction with the digital component of bike share schemes: with registration, the smart phone app and the rental process all scoring over 70% as the combined share of very satisfied and

fairly satisfied users. Around two thirds of all users are also very satisfied or fairly satisfied with key physical components of bike share schemes, namely the coverage of bikes over an area, the bikes' brakes and the bikes' lights. Bike baskets generate the lowest rate of very or fairly satisfied respondents, although this is partly due to the higher proportion stating 'not applicable'.

Please rate your experience of the following aspects for the bike share scheme you use most often? (values in %)



Next steps

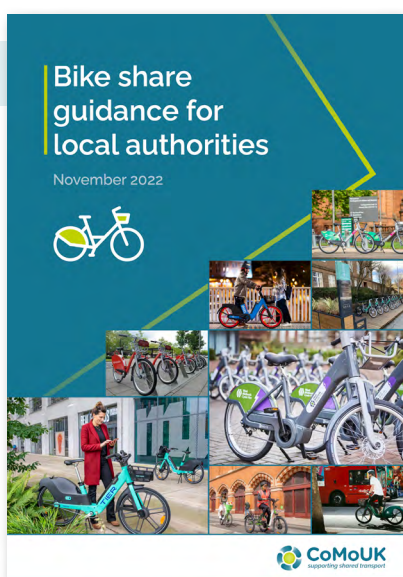
This report clearly demonstrates the positive impact that bike sharing has on the UK's transportation system and the social value that bike sharing creates through its economic, environmental and health benefits. To maximise these benefits and to manage the growing demand for bike sharing, it is important to understand potential challenges that bike share schemes might be facing

When asked about the main barriers to using bike share, via a question that allowed for multiple responses, the largest share of respondents, 56%, chose availability/bike locations. This was followed by concerns around personal safety, busy roads and a lack of safe cycling infrastructure (38%), and a lack of awareness (27%). Interestingly, price was also mentioned by 38% of respondents, even though bike share is relatively cheap compared to many other transport modes.

The findings suggest that there is a clear demand for bike share schemes, even where availability is currently limited. Additionally, as bike share schemes grow, the physical infrastructure for safe cycling needs to grow with them. In the survey, respondents were also asked about potential parking options for shared bikes. There was greater support for designated parking areas for shared bikes (either with docks or physically or virtually designated parking bays) rather than for the option of being able to park shared bikes anywhere. A clear majority of 60% of respondents also argued that parking bays for shared bikes should come from converting areas of on-street car parking rather than using pavement space. This finding is striking since bike share use and car ownership are not mutually exclusive. 52% of respondents stated that they currently own a car, with another 18% using a car club vehicle or sharing a car in some other way.

Bike share guidance

Please see [CoMoUK's Bike share guidance for local authorities](#) for our latest planning and policy recommendations on bike sharing.



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