Beryl Demographic Survey 2021

We ran our demographic survey in August 2021. We received over 1000 responses.

Survey results provide insight into who our users are, what they care about, and their behaviour before, during and after riding a Beryl vehicle.

Introduction from Philip Ellis, Beryl CEO

The world is changing and recent events such as the COP26 conference have put sustainability and carbon reduction at the top of the news agenda; meaning there has never been a better time to change the way we travel in our towns and cities.

We're also seeing more investment in cycling infrastructure nationally and the development of some truly excellent schemes designed to encourage people out of their car and onto two wheels. It's also exciting to see major cities placing cycling at the heart of their transport revolutions.

We're here to help enable that change effectively by listening to our users, understanding their motivations and learning more about their behaviour before, during and after riding our vehicles.

This is our second Annual Demographic Survey, undertaken in August this year just after the lifting of all COVID-19 restrictions, and it shows some interesting finds. Convenience is the most important factor to people when choosing a micromobility service. We will continue to adopt a data-driven approach to ensure our services are accessible in the areas they're needed the most.

Another finding from this year's data that struck me was the drop in people's confidence when cycling in traffic. Last year's data was obtained during the height of the pandemic, when quieter roads and an increase in, albeit temporary, designated cycle lanes created a more reassuring environment for people to get out on a bike.

What this shows is that quieter roads and better infrastructure are important in encouraging people to adopt active travel measures. This is amplified when it comes to female and other group users and we will continue to advocate for the development of greater infrastructure.

Our first annual demographic survey was conducted in July 2020 at the initial peak of the COVID-19 pandemic and shortly after the full national lockdowns. This year, although lockdowns are no longer in place, higher prevalence of working from home and holidaying within the UK will have an effect on the behaviour of users.

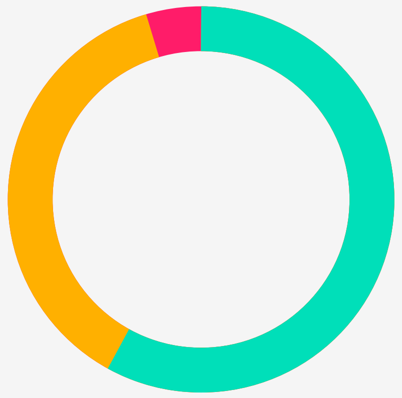
Ultimately, what we can take from the survey is that the public is ready to embrace change, but they need help and support. We can do that by continuing to listen to what they tell us and using it to shape how we provide as many people as possible with access to convenient, safe and enjoyable forms of active travel.

Methodology

We surveyed our users in the schemes we operate (BCP, Hereford, Norwich, Watford and Isle of Wight) in August 2021. The survey was sent to users via email, and we collected over 1000 responses. Of these respondents, 22% had signed up but not yet taken a ride, while 78% had taken at least one ride.

The survey allows us to understand users' motivations, as well as their behaviour before, during and after riding our vehicles.

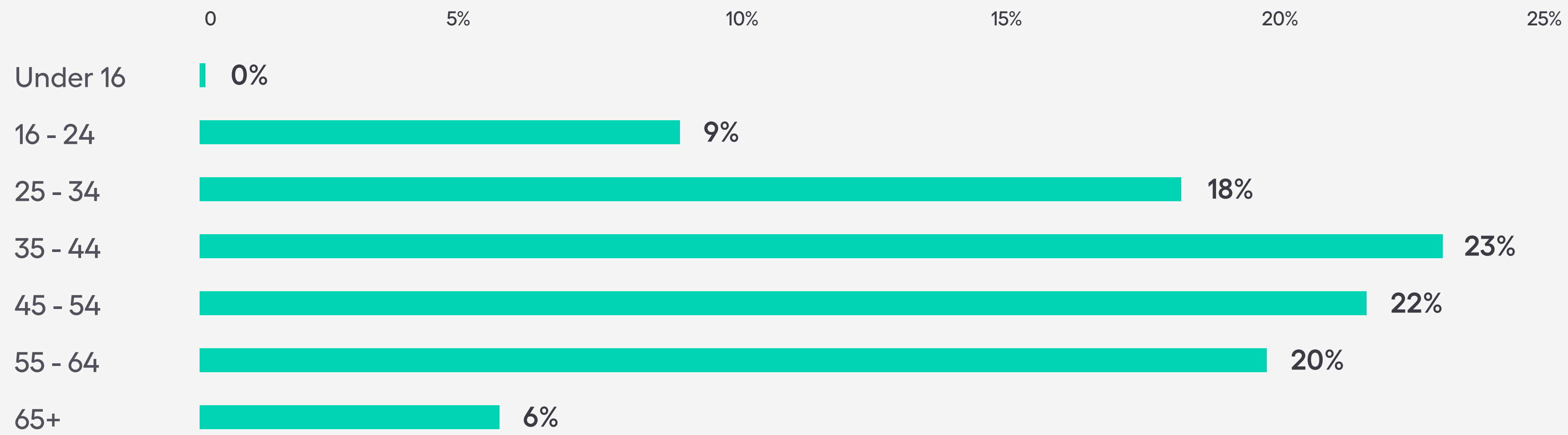
Key Findings



Gender split

- Male 58%
- Female 38%
- Non-binary or other 4%

Age



The median age of our riders is 35-44

The top reasons given for signing up are

34% I like to try new things

30% More fun

27% Convenience

Last year, soon after the initial peak of the pandemic, the number one reason was 'health benefits' at 33%. This year it has dropped to 9%.

The top ways users find out about Beryl

71% Saw vehicles on street

22% Word of mouth

19% Social media

55% of our users are now cycling 'more often' or 'much more often' since they started using Beryl.

49% of users would have driven a car or van instead of using a Beryl vehicle, and 21% would have been a passenger in a car or van

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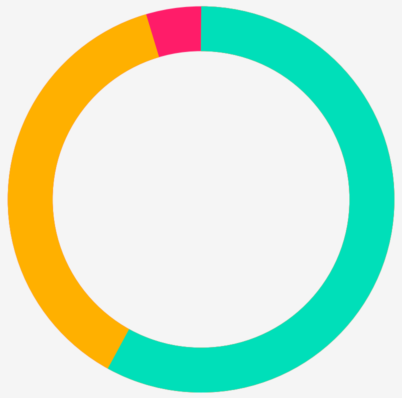
29% have reduced their usage of private cars

Demographics



Gender split

- Male 58%
- Female 38%
- Non-binary or other 4%

Our proportion of male riders is slightly higher than the national average for bike share[1].

Last year it was 48% male and 51% female - why has this changed?

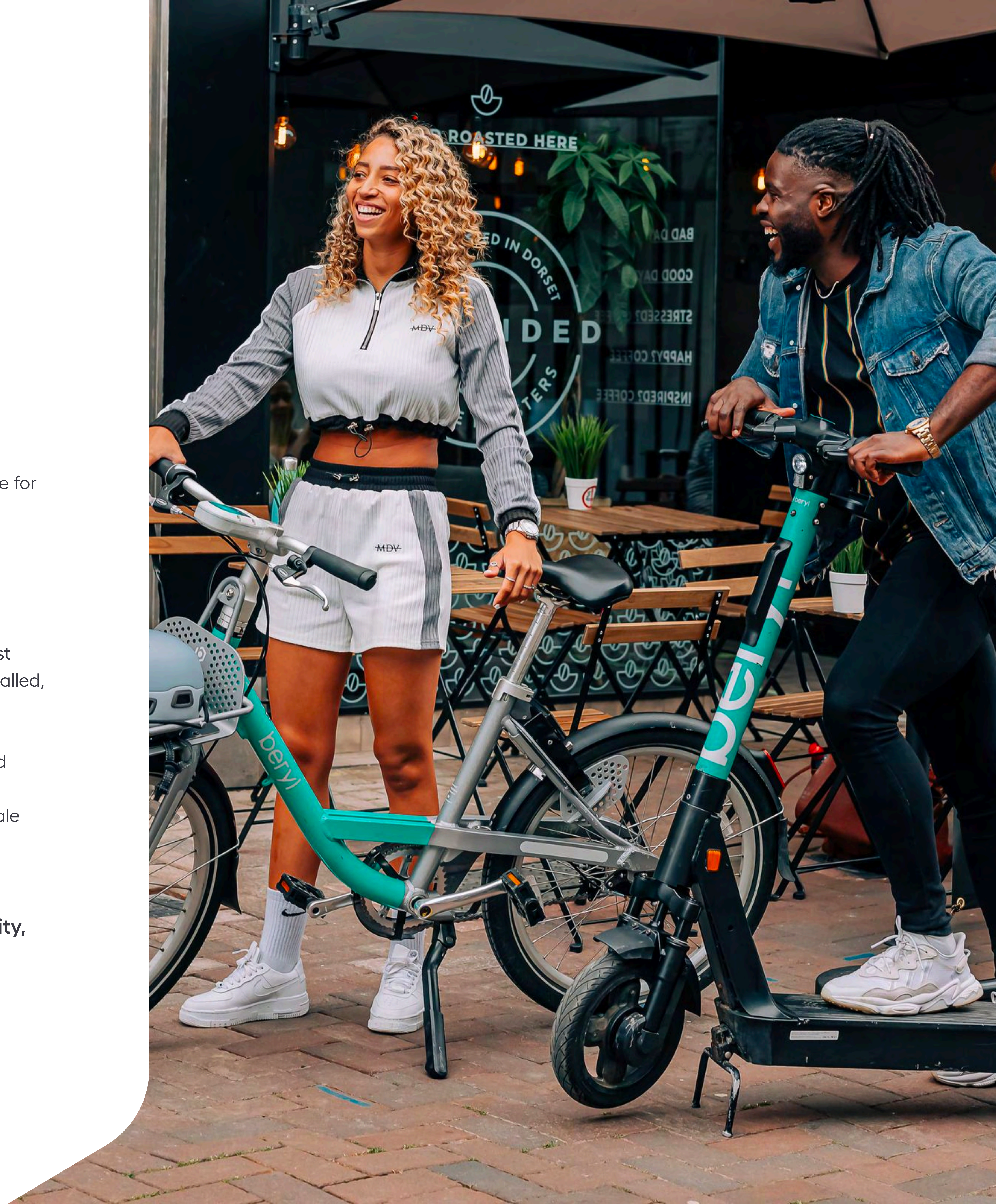
The importance of proper cycling infrastructure

We have seen a noticeable drop in confidence cycling in traffic since last year, when roads were quieter and temporary cycle lanes had been installed, which have subsequently been removed in many areas.

Cycling confidence is much lower in female respondents than male, and female respondents who cycle less often are less confident.
We asked our users how confident they felt cycling after dark, and female respondents are far less confident than male.

82% of female respondents said safety was 'very important' or 'somewhat important' when deciding to use shared micromobility, compared to 71% of male respondents.

[1] CoMoUK Bike Share Survey, 2020

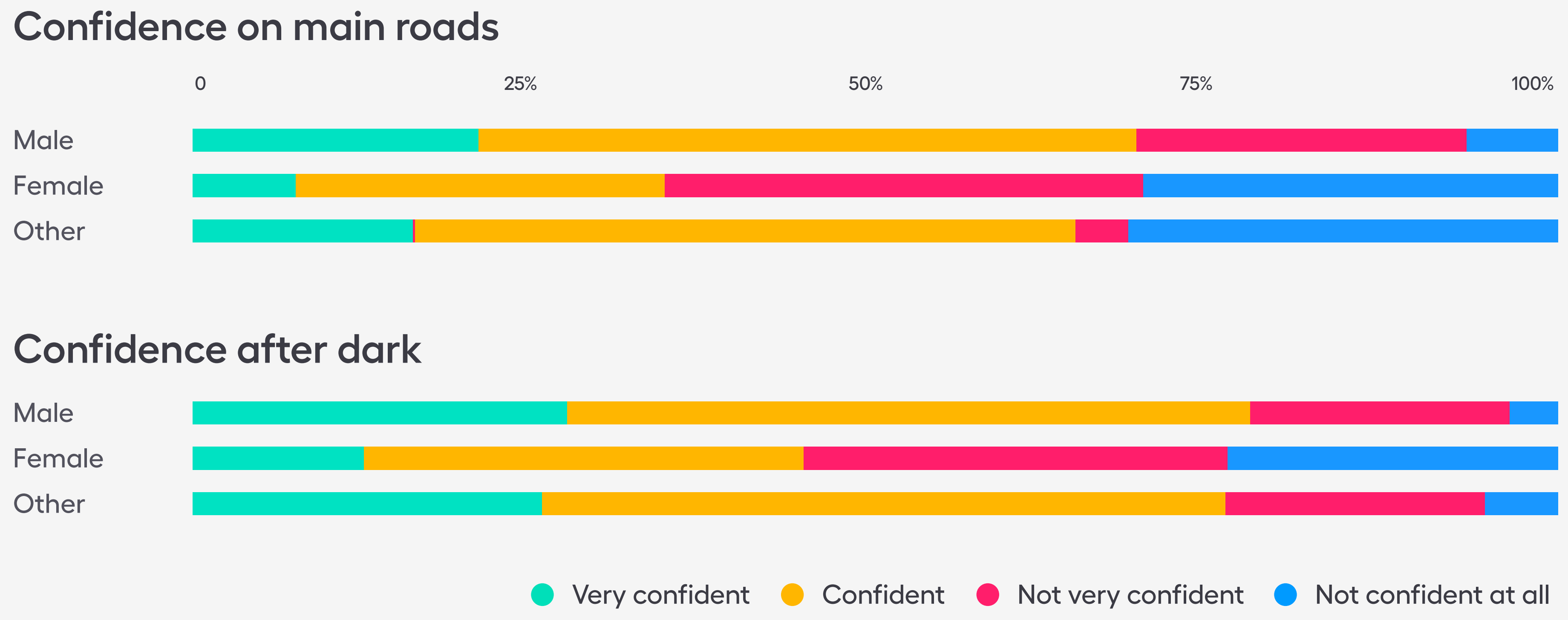


Demographics

Female respondents are much more likely to ride for leisure and exercise purposes, and less likely to use our vehicles as a mode of transport. This is reflected in the fact that female respondents are less likely to have reduced their car usage than male respondents.

Our findings demonstrate the detrimental effects of poor cycle infrastructure, and the barrier it creates for female riders. This barrier limits the potential for reducing car trips and helping residents switch to more sustainable transport options.

At Beryl we will continue to advocate for safe cycling infrastructure such as segregated and well lit cycle lanes.



Demographics

Disability
Nearly 10% of our users consider themselves to have a disability. This increases to nearly 12% of scooter users.

Those with disabilities are much more likely to use electric vehicles, especially scooters. Electric vehicles help provide access to shared micromobility for disabled users.

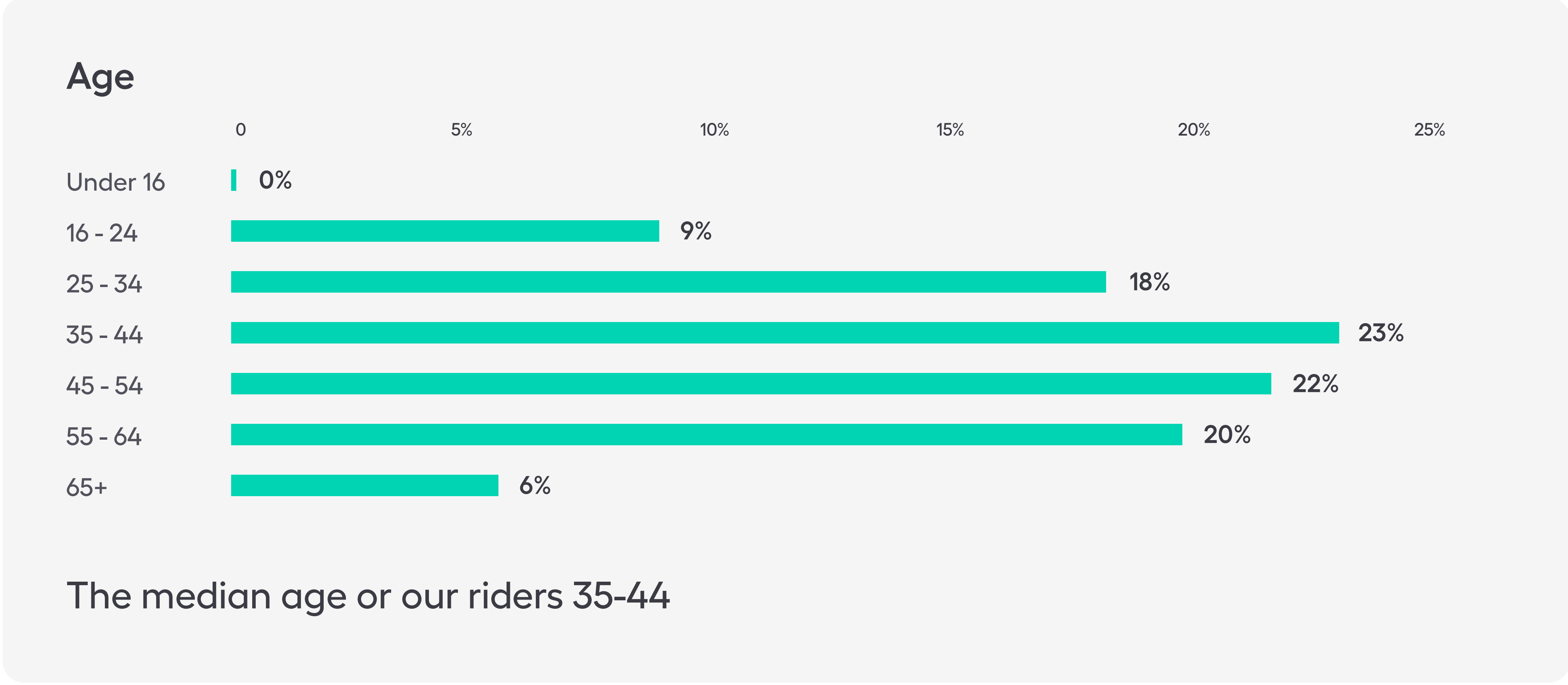
Age
The median age of our users is 35-44. 72% are under 54.

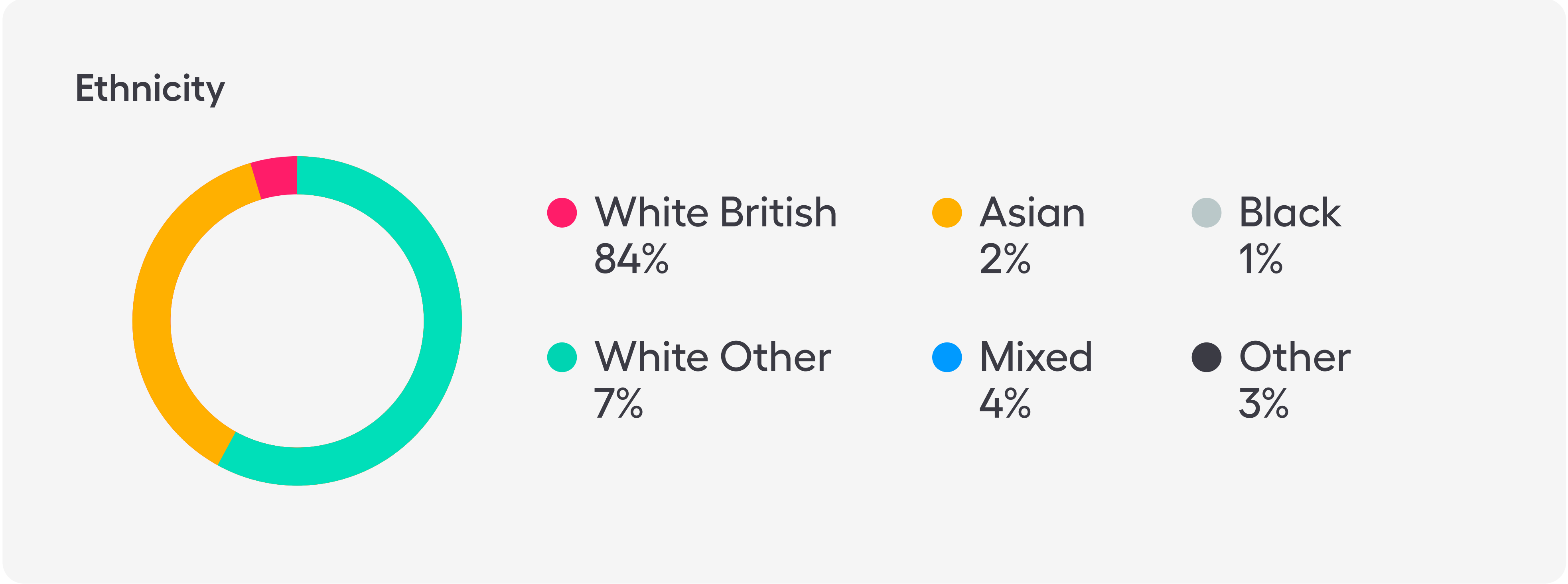
Ethnicity
Our users have a slightly higher makeup of mixed and other ethnicities than the general populations of our schemes[2].

Employment status
58% of our users are full time employed. 9% are retired, and 4% are students.

Household income
The median household income of our users is £32,000 - £47,999

[2] England and Wales 2011 Census





Why do users ride?

The top reasons given for signing up are

34% I like to try new things

30% More fun **27%** Convenience

Last year, soon after the initial peak of the pandemic, the number one reason was 'health benefits' at 33%. This year it has dropped to 9%.

What do our users care about?

The most important factor when choosing a micromobility service is convenience, with 91% of users citing this as 'very important' (72%) or 'somewhat important' (19%).

This was followed by cost (88%), and safety (75%).

How does Beryl impact behaviour?

52% of our users are now cycling 'more often' or 'much more often' since they started using Beryl.

64% of existing cyclists now cycle 'more often' or 'much more often', and 45% of riders said they started cycling again after a break.

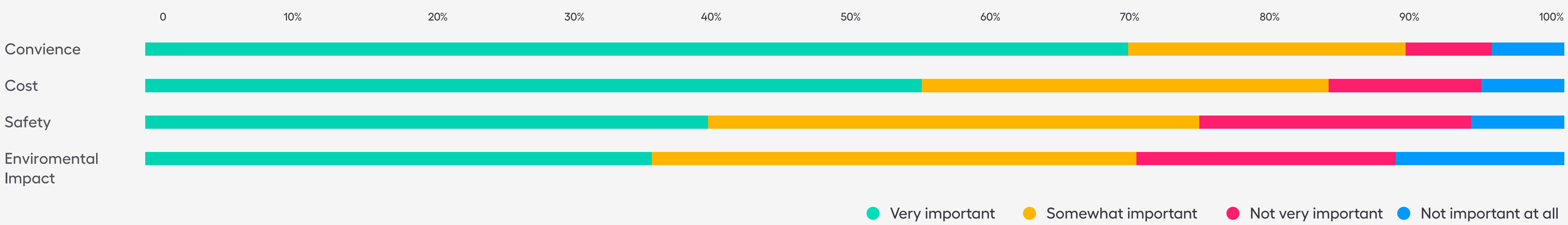
2% started cycling for the first time ever.

29% of riders have reduced their use of private cars.

36% have reduced their use of public transport, and 39% have reduced their use of taxis.

67% of users have ridden our vehicles to replace a car, van or taxi journey (either as a driver or a passenger).

Most important factors



The case for multimodality

Driving behavioural shift:

Providing a range of transport options has a greater effect in changing user behaviour to increase cycling and reduce usage of cars.

Those who use e-bikes or multiple vehicle types are more likely to be cycling more often than they were before. They are also more likely to have reduced their usage of cars.

46% of riders who ride both pedal and e-bikes have reduced their car use, compared to 25% of those who only ride pedal bikes

Users who ride both bikes and e-bikes are the most likely to use them for work purposes, at 26% compared to 16% of those who only use bikes and 19% of those who only use e-bikes.

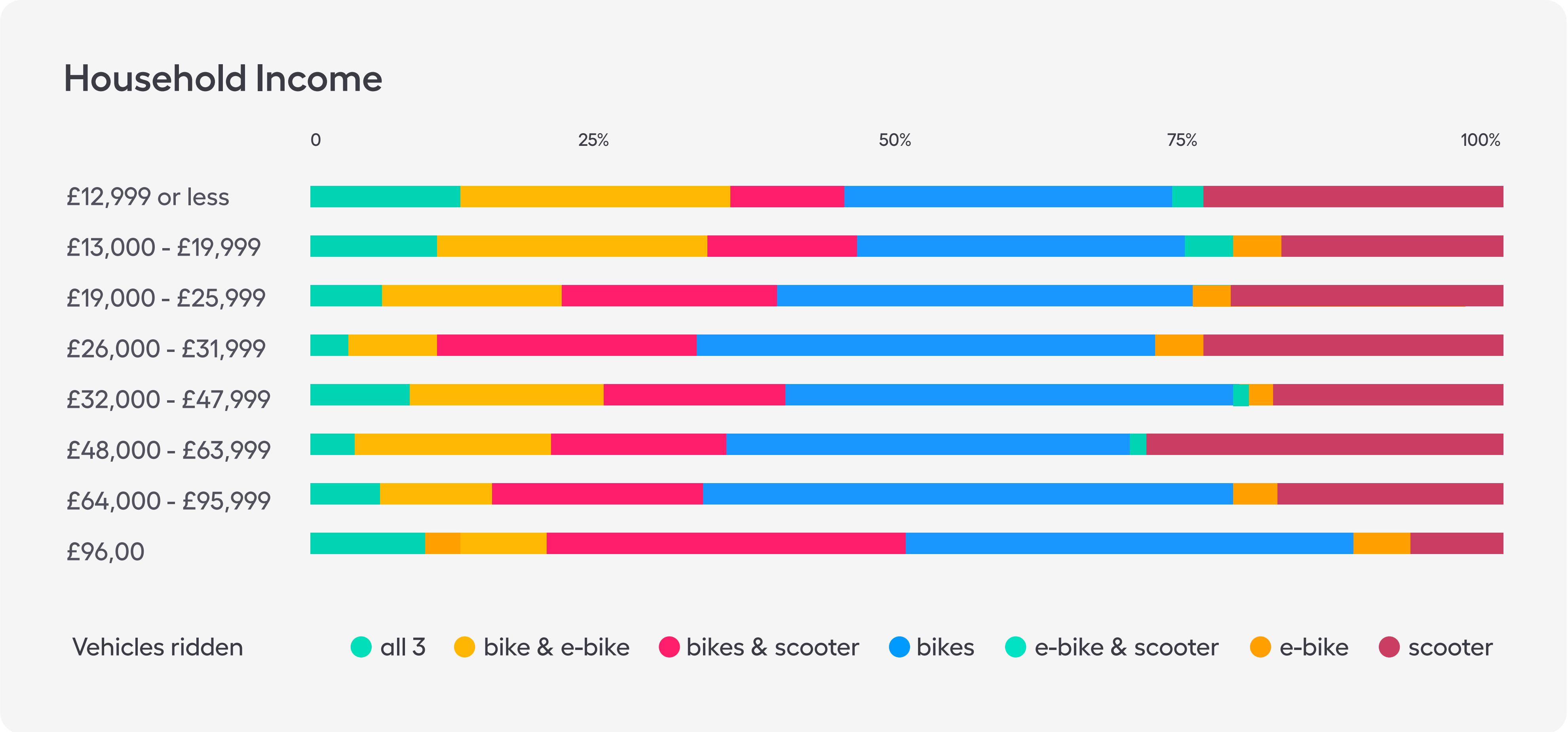
Users who ride multiple vehicle types ride further and more frequently, with an average distance per journey of 2.5km and 1.45 journeys per month compared to 1km and 0.45 journeys per month for users who only ride one vehicle type.

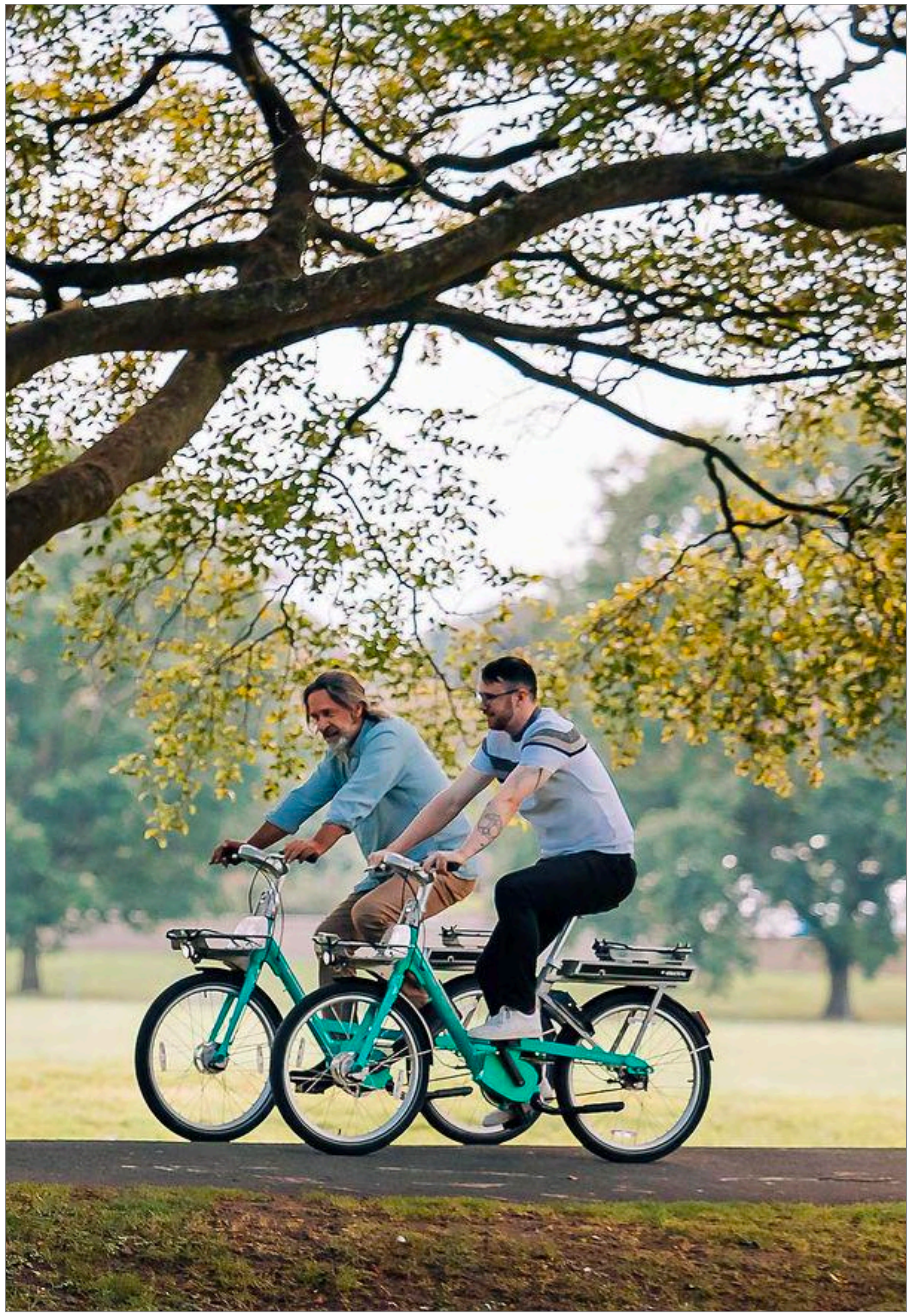
Expanding the transport mix

Users who ridden multiple vehicle types are more open to trying new micromobility services.

70% of users who have ridden multiple vehicles are using or are open to using shared cargo bikes and 65% have used or are open to using shared e-mopeds, compared to 56% and 47% of users who have only ridden one vehicle type.

The case for multimodality





Creating a more accessible scheme

Lower income users are more likely to use multiple vehicle types. 46% of those with a household income under £26,000 use pedal bikes for shopping, errands and work purposes compared to 41% of those with a higher income.

Pedal bikes serve as an access vehicle to multimodal schemes. In our schemes where they are available alongside other vehicle types, 81% of users have ridden them.

With lower income users less likely to use the vehicles for leisure purposes, and more likely to use them as a mode of transport for shopping, errands and work purposes, a multimodal scheme is all the more important to provide them with access to sustainable transport.

Supporting and complementing local infrastructure and transport mix

Micromobility services can complement and enhance local public transport, rather than taking away from it. This serves to help get cars off our streets in urban areas, allowing users to make more affordable and more sustainable choices when travelling around their towns and cities.

34% of users have connected with other modes of public transport when riding our vehicles

Our riders are using our vehicles to make first mile/last mile trips, with 61% of trips connecting with trains and 71% of trips connecting with buses under 3km.

Last mile trips are replacing car, van and taxi trips.

31% of last mile commutes by bike, 33% of last mile commutes by e-bike and 38% of last mile commutes by scooter.

6% of riders use public transport more often, and these users are more likely to connect with public transport than other groups - 21% connecting with buses and 22% connecting with trains.

Last mile commutes

31% Bike

33% E- Bike

38% Scooter

Replace car, van or taxi trips.

Connecting with public transport