



Rider Report

2024



Contents

- 2 Introduction by Phil Ellis
- 4 Methodology
- 5 Key findings
- 7 Motivation
- 9 Cost of living
- 11 Purpose
- 12 Behaviour change
- 14 Electric vehicles
- 16 Accessible transport
- 18 Safety
- 21 Rider demographics
- 23 Rider testimonials



Introduction from Phil Ellis, Beryl CEO and Co-founder

It's been another year of progress and expansion for Beryl, with our hard work, experience and innovation enabling us to thrive and grow as the UK's leading micromobility operator. We are privileged to serve customers all over the country.

We've opened several new shared transport schemes, extended many of our existing ones and seen some of our most-established ones achieve significant milestones, with ridership well into the millions. We also became the first shared transport operator to win a prestigious [King's \(formerly Queen's\) Award for Enterprise](#), recognising our commitment to sustainable development.

Our holistic approach means that we strive to fully integrate with the towns and cities that we serve. Not only do we ensure that our vehicles interconnect with existing transport and physical infrastructure, we also try to go beyond mere service provision and contribute positively to community life*.



In social value terms, we have contributed more than an estimated £9m across our schemes since launch, which is significant**.

*Zag Daily - [Beryl and Social Value: Beyond the schemes](#)

I feel that this approach is reflected in the results of our fifth annual Rider Report, which is by far our biggest one yet. At more than four times the sample size of its predecessor, the data provides an even more accurate insight into what makes our riders tick.

One of the most encouraging trends this year is the decreasing reliance on private car, van, taxi and motorbike journeys. It's great to see that, by breaking down the barriers to active travel for many, we are encouraging the more widespread adoption of sustainable transport habits. That will only have positive effects on traffic congestion levels, riders' mental and physical health and carbon emissions.

We can see that our vehicles are becoming less of a novelty, both in terms of journey type and frequency. Commuting is now firmly established as the main reason for use while more users are riding monthly, suggesting that shared transport has become part of their routine.

**Social value calculation comprises elements such as, but not limited to, local employment, subcontractor (MSME) spendings, carbon reduction, car miles saved through using e-vehicles and donations to community groups.





Electric transport is more popular than ever and generating increasing demand. In September, we released our brand new, industry-leading [BBE2 e-bike](#) and have already seen excellent ridership and really positive feedback from both of its initial launch schemes - Guildford and Stevenage.

I'm excited to see what 2025 brings for e-scooters, after the government's recent indication that they will look to introduce legislation. We know that people love the fun, convenience and flexibility of e-scooters and that is why they are so well used. The correct legislation would have a chain effect, making them more accessible, boosting their popularity, getting more people out of their cars and amplifying calls for better infrastructure.

As I mentioned earlier, our focus has always been and will continue to be on ensuring schemes are as integrated, convenient and easy to use as possible. We achieve that by listening to feedback and using it to drive improvement and progress. I promise you that we will continue to adopt this approach for a successful 2025 and beyond.

A handwritten signature in black ink, appearing to read 'P. N. Ellis' with a stylized flourish at the end.

Phil Ellis
CEO and Co-founder

Methodology

The 2024 Rider Report is an annual survey of people who have signed up to use Beryl, including both those who have taken a ride and those who have yet to (hereafter, non-riders). The report is compiled to help us identify and understand trends, patterns, demographics, motivations and obstacles to using shared sustainable transport. **This year's survey is by far the biggest report to date**, with over 13,000 responses (7,921 riders and 5,250 non-riders) across 16 schemes. The data was obtained between Friday 22 November and Tuesday 10 December 2024.



Key findings



Commuting is key

Commuting is the primary purpose for using Beryl vehicles and accounted for 34% of rides, a 3% increase on last year.



E-bikes are the go-to mode

E-bikes are riders' preferred mode, with 75% riding them in the last 6 months, showing the attraction of convenience and reduced physical effort.



62%

of riders replaced a car, van, taxi or motorbike trip with a Beryl trip

representing a 6% increase from 2023 that shows Beryl's growing impact on reducing congestion, cutting carbon emissions and getting people more active.

More important to riders than in 2023:

- ↗ 9% Convenience
- ↘ 16% Novelty
- ↗ 3% Speed

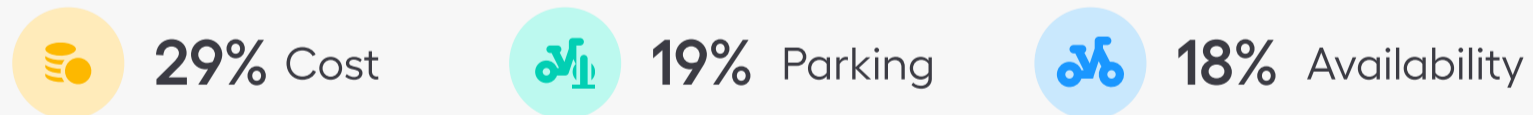
Novelty is down 16% this year as a reason for riders signing up to Beryl, suggesting that Beryl is transitioning from an innovative concept to an established and reliable transport option.



Other key findings

- Beryl is expanding mobility options, enabling 63% of riders to undertake journeys they wouldn't have otherwise taken.
- Beryl is becoming a more established part of transport routines, with 70% riding vehicles at least monthly.
- The number of riders with a disability increased for the second year in succession.
- There is a greater gender imbalance this year. Safety concerns and infrastructure are around twice as likely to stop women taking their first Beryl ride compared to men.

For non-riders, cost is the **most significant barrier to first-time use**, followed by parking bay availability and vehicle availability.

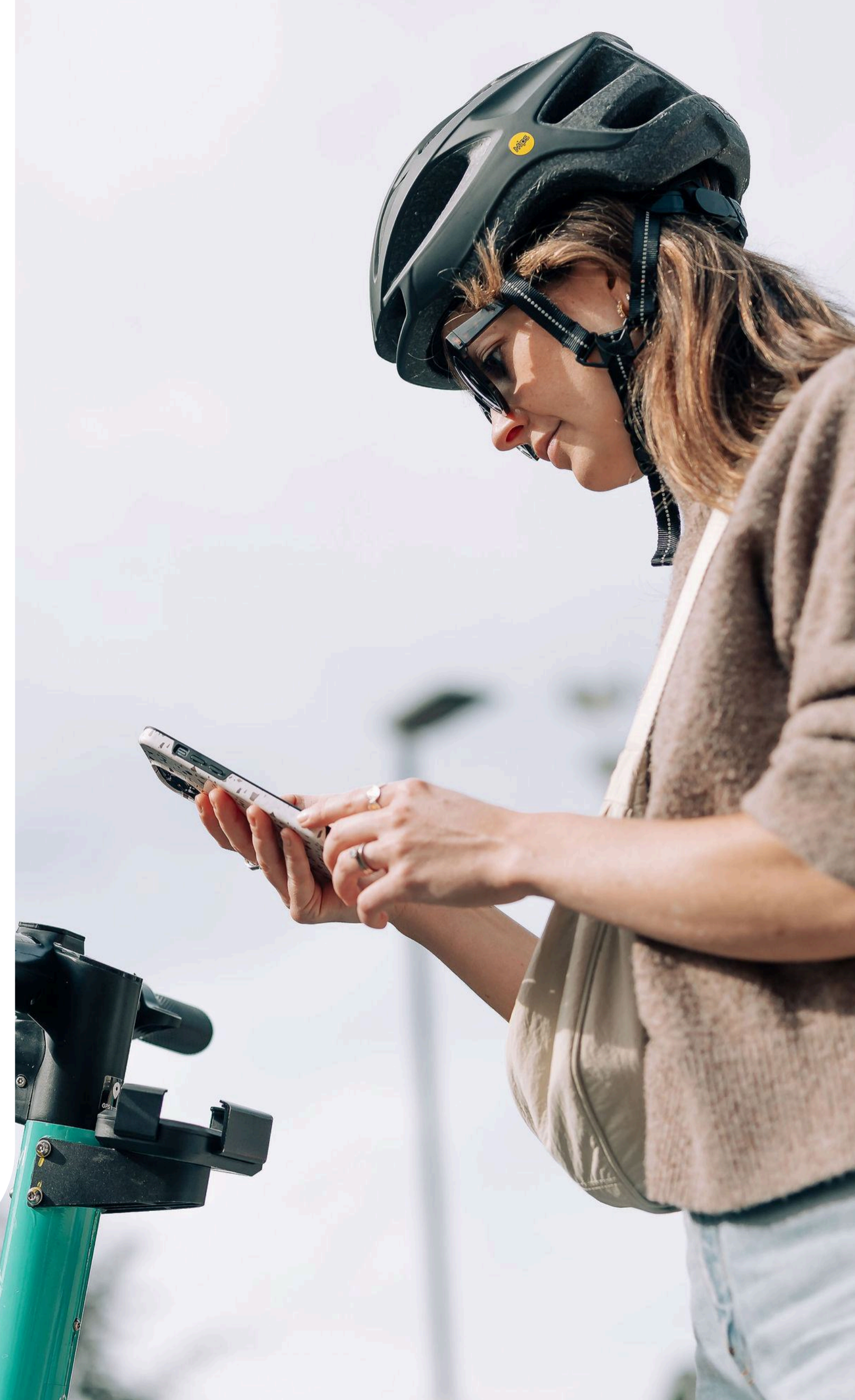


Top factors affecting cycling confidence for non-riders:

52% The attitudes of other road users

43% Road conditions

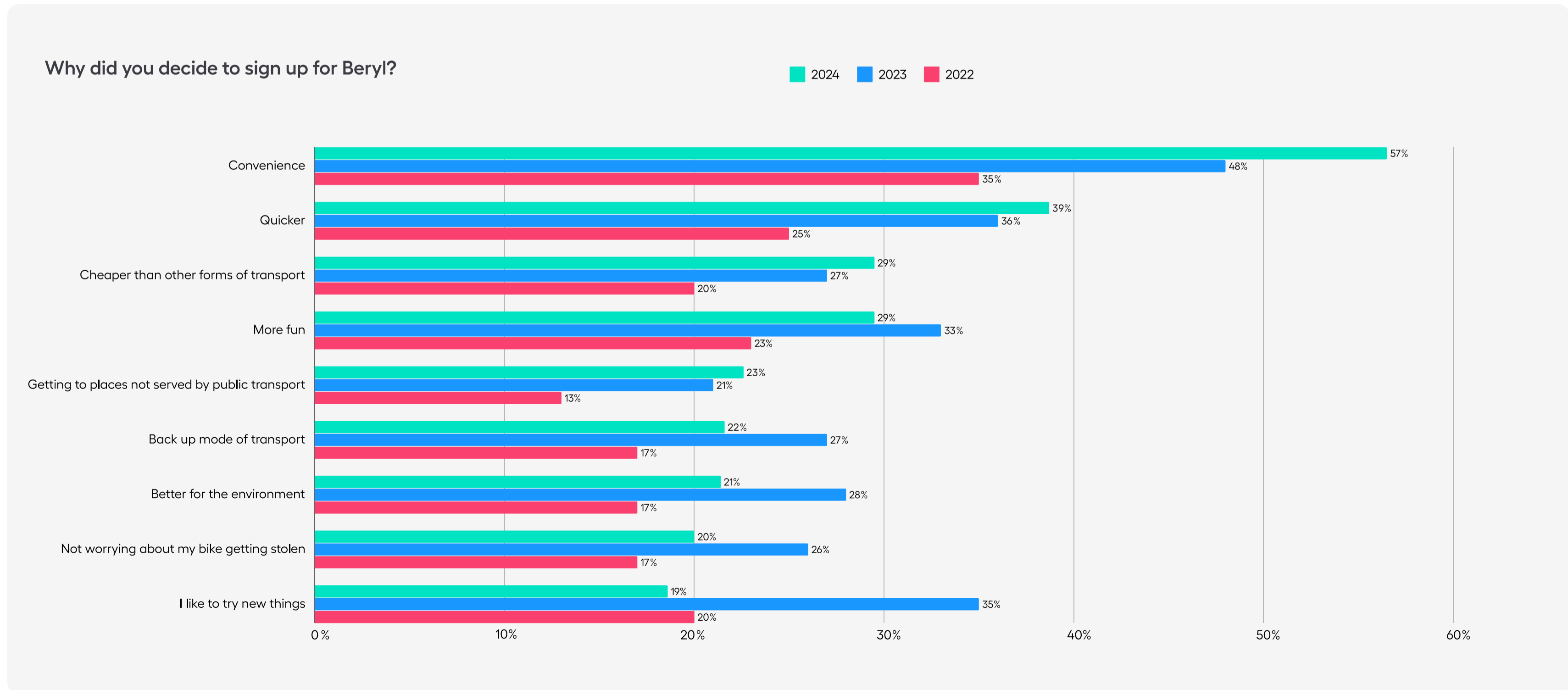
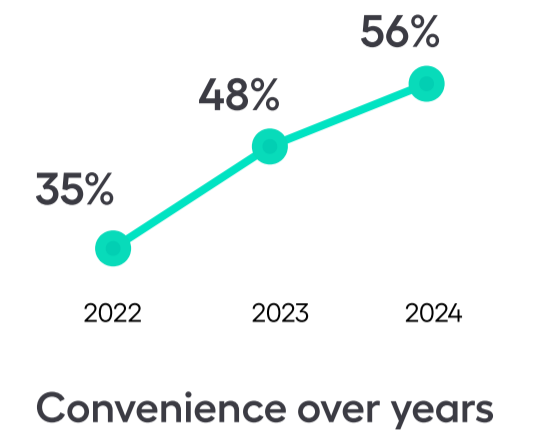
Non-riders feel least confident in traffic on main roads (only 37% feel very confident).



Motivation: Why do people sign-up?

Convenience is king once again for Beryl riders this year, with 9% more riders citing it as the top motivation for using Beryl compared to 2023. This is the second year in a row that convenience has seen a significant hike as a motivating factor, having previously increased by 13% between 2022 and 2023. The second most popular factor is the short timespan in which Beryl allows riders to complete a journey (Quicker, in the report) which, at 39%, is also up 3% on last year.

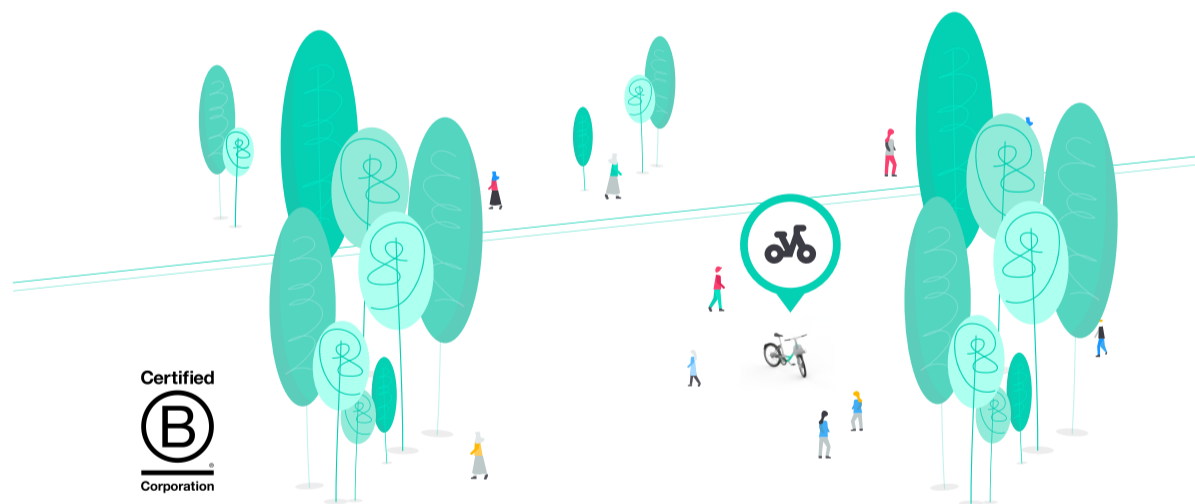
With its lack of reliance on timetables and set-routes, Beryl can often prove to be a time-saving alternative to buses, trams or trains. This is appealing to those with busy lifestyles or living in areas with high congestion levels or poor public transport links.



Motivation: Why do people sign-up?

↓ ★ 16% Novelty ↑ 🚲 2.5% Cheaper

Fewer riders have cited novelty purposes as a reason for signing up to Beryl in 2024, a significant 16% decrease on last year. This is despite the launch of the aforementioned new schemes, which can often stimulate curiosity or 'novelty' use. This suggests that Beryl is transitioning from an innovative concept to an established and reliable transport option.



Nearly a quarter (24%) of non-riders cited the environmental benefits of shared transport as a reason for signing up. This shows that, as a B-corp registered company and sustainable transport operator, Beryl's eco-friendly image resonates with potential riders.



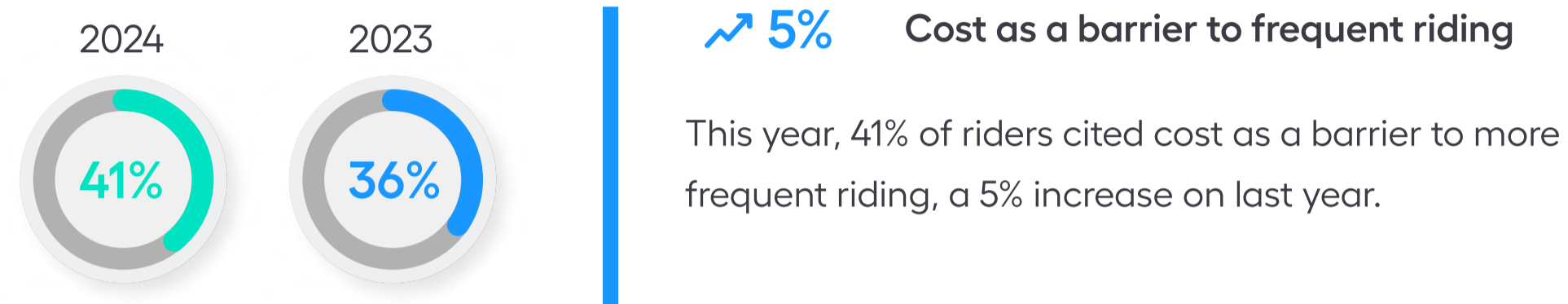
Rider quote

“I started using Beryl two years ago. I live independently... Beryl allows me to be able to complete errands quickly and without unnecessary worry.”



Cost of living

The cost of living shows no sign of decreasing, meaning financial resources continue to have a significant impact on people's transport choices.



29%

Similarly, 29% of non-riders cited cost as a barrier to taking their first ride, which makes it the most common reason. For those non-riders, the lower the household income, the more likely they were to cite cost as a reason not to take their first ride, further reflecting a growing economic pressure.

30% **of all respondents still cited cost-effectiveness compared to other transport as a reason for signing-up.**

↗ 3%

This is a 3% increase on last year, making it the third most popular reason and suggesting Beryl still offers value compared to other transport options. This is especially true in relation to private vehicles, which require fuel, tax, MOT, storage, insurance and maintenance costs.



Cost of living

Beryl has been proactive during 2024 in this respect, running low cost accessibility projects, decreasing prices in some schemes and introducing discounted payment options across several others. With the cost of living in the UK showing no signs of decreasing, financial factors will continue to impact use over the coming years.

Rider quote

“It is cheaper than any other transport option for the distance I have to travel.”



Low cost access projects:



Student Discount

Those in higher education can get 25% off Minute Bundles and Rider Passes for the entire academic year.



CycleSaver

Can save people between £18 to £30 per month on an annual e-bike subscription.



Community Champions

Charities and community groups can apply for up to £150 of Minute Bundles to distribute to volunteers or those in need.



Job Seekers

We work with job centres across the UK to offer Minute Bundles to new placements (and 50% discount going forward).



Social Prescription

We work with GP surgeries to offer Minute Bundles for distribution via social prescription programmes.

Purpose: What do people use Beryl for?

Commuting has replaced leisure rides as the most popular primary journey type in 2024, with 34% of riders stating it is their primary purpose for using Beryl vehicles.

In 2024 Beryl partnered with several universities, providing discounted rates, on-campus infrastructure and scheme management. This is reflected in the 8% increase in the number of riders citing university as the primary purpose for riding.



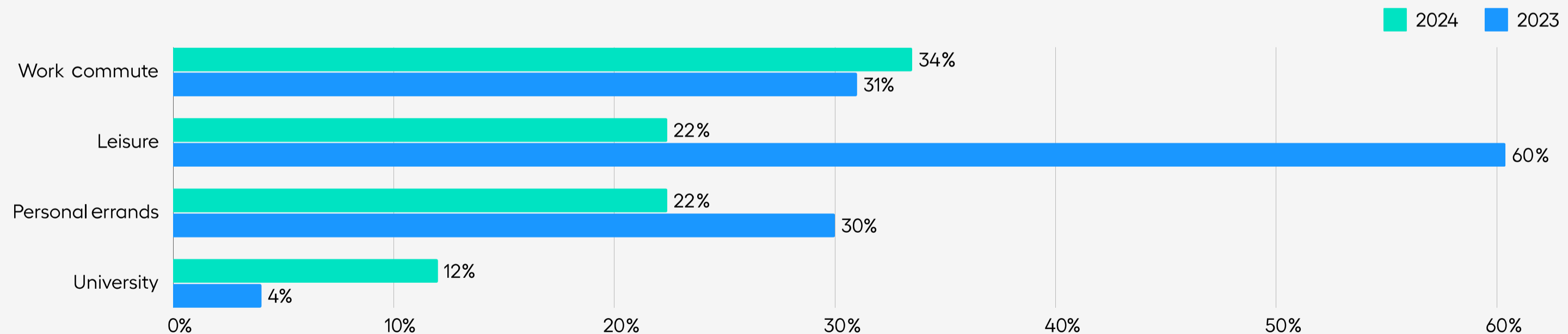
Nearly two thirds (63%) of riders who have commuted with Beryl, have done so for 1-3 days per week. This could indicate that Beryl is used to supplement other commuting methods and that many take an **evolution not revolution** approach to adopting more sustainable habits.

Rider quote

“I use beryl e-bikes in Brighton as part of a commute to London via train... shaves off about 25-30 minutes a day.”

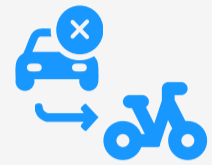


Beryl vehicles: Top four uses 2024



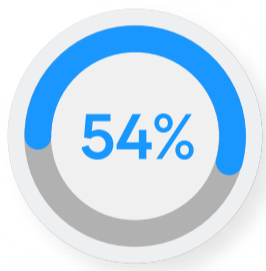
Behaviour change

Beryl's core aim is to break down the barriers to active travel use and several responses highlight significant success in this mission.



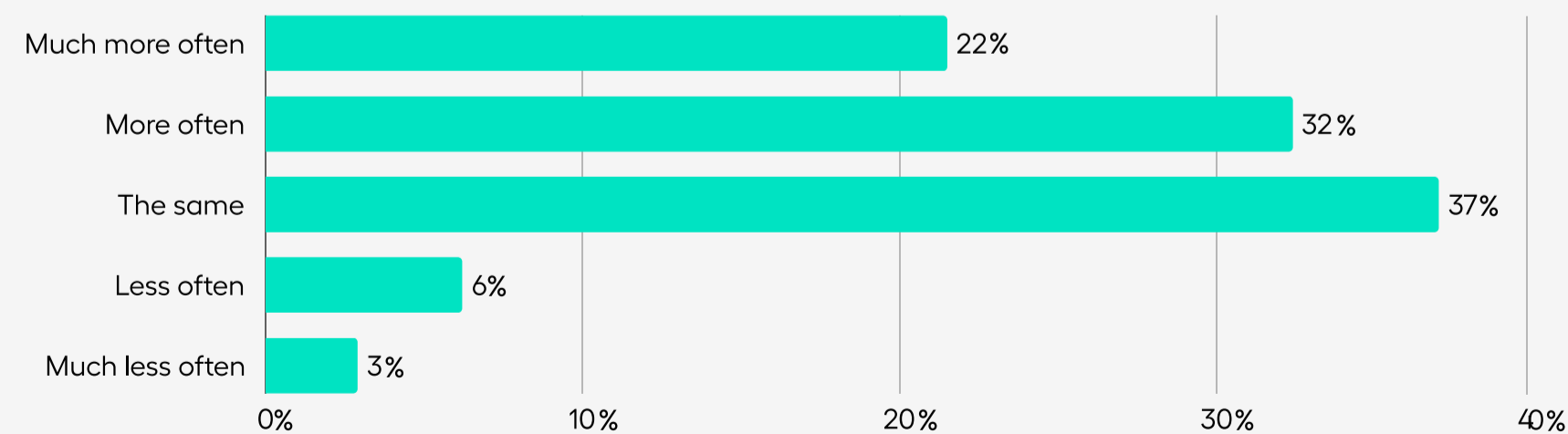
Beryl is reducing reliance on private vehicles, with 62% replacing a private car, van, taxi or motorbike trip with a Beryl trip.

This is a significant 6% increase from 2023 and shows a growing acceptance of shared mobility services as a viable and preferred mode of transport. By providing a convenient, cost-effective and easy-to-use alternative for shorter journeys, we are helping encourage people to adopt more sustainable transport habits.



It's encouraging that Beryl continues to positively influence riders' wider cycling habits, with 54% of riders cycling more often since using the service, a 1% increase from 2023.

Since using Beryl Bikes, how often have you been cycling?



Behaviour change

43% of riders either first started cycling or resumed regular cycling after a break when they started using Beryl.

Of these:

19% had resumed following a break of five years or longer.

19% had resumed following a break of under five years.

5% had first started.

Rider quote

“I've started cycling way more since, first on Beryls and now on my own bike... showing me new parts of the city.”



More than 53% had either already bought a bike/e-bike or would consider buying their own since using Beryl.

These factors demonstrate how shared transport can serve as a catalyst for active travel.

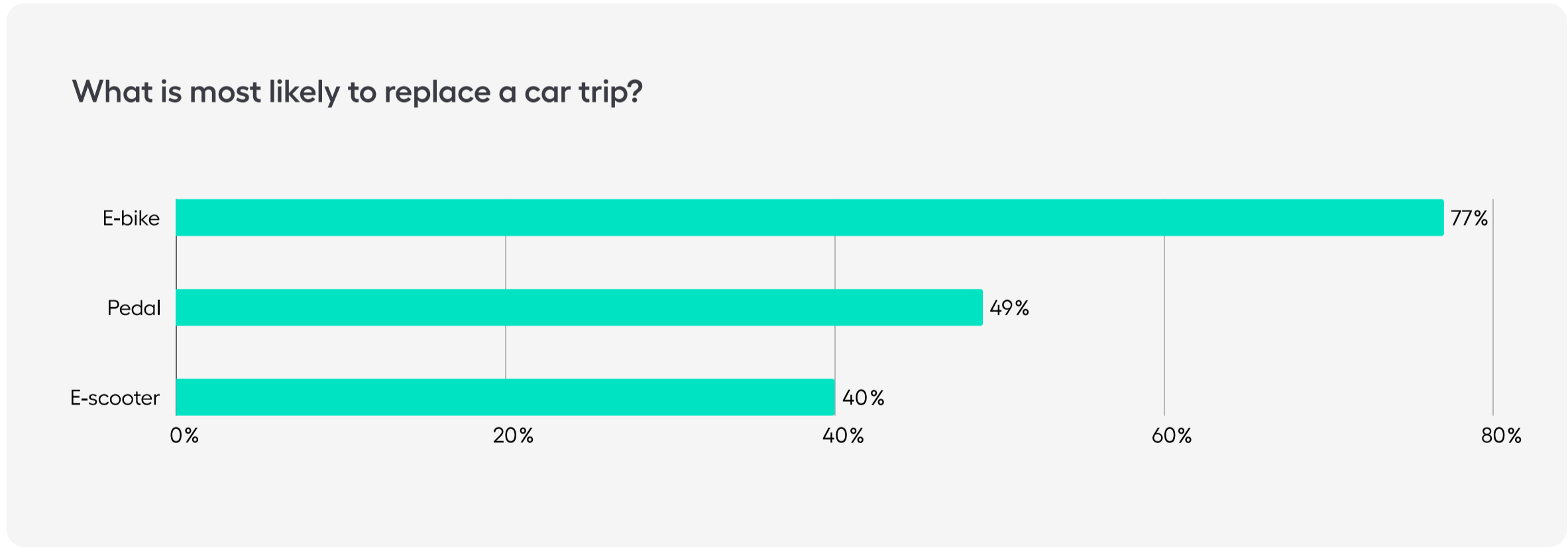
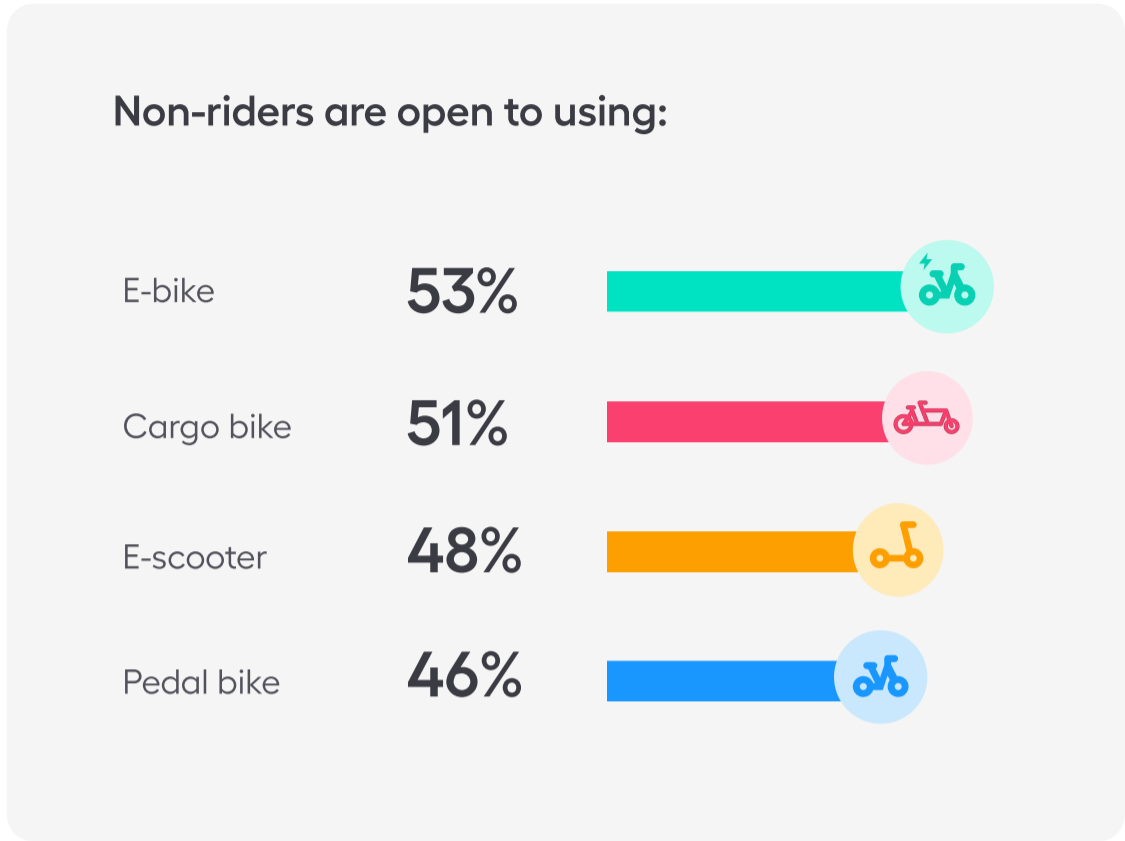


Electric vehicles

This year, e-bikes are by far the mode most likely to replace a car journey, with 77% of riders. This makes them 28% more likely than pedal bike riders.

Riders would also be most likely to choose an e-bike if all Beryl modes (bike/e-bike/e-scooter/e-cargo bike) were available. More than half of those asked chose the e-bike, with e-scooters the next most popular at 32%.

E-bikes are also the most desired mode for non-riders with 53% open to using them.

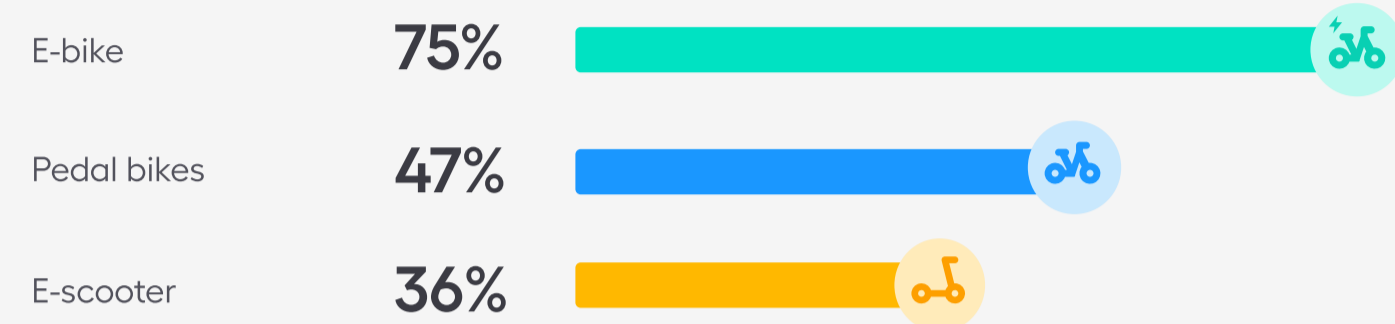


Rider quote

“I enjoy the e-scooters as they give me more freedom and convenience than public transport or driving, as I have chronic health conditions which prevent me from cycling.”



Modal popularity:



Of all riders asked, 75% had used an e-bike in the last six months, making it the preferred mode by some distance. This could reflect the increasing influence of the mode, with e-bike schemes launched in Dorset, Worcester, Stevenage and Guildford this year, as well as the launch of Beryl’s brand new, industry-leading BBE2 e-bike.

75% of riders said they would commute more if more electric vehicles were available.

E-bikes are ideal for commuting, with the electric assist helping to reduce effort and better tackle hilly terrain, allowing riders to arrive both fresher and in less time. The popularity of electric vehicles also further indicates that appropriate e-scooter legislation would make the mode more accessible and, subsequently, more widely used.

Rider quote

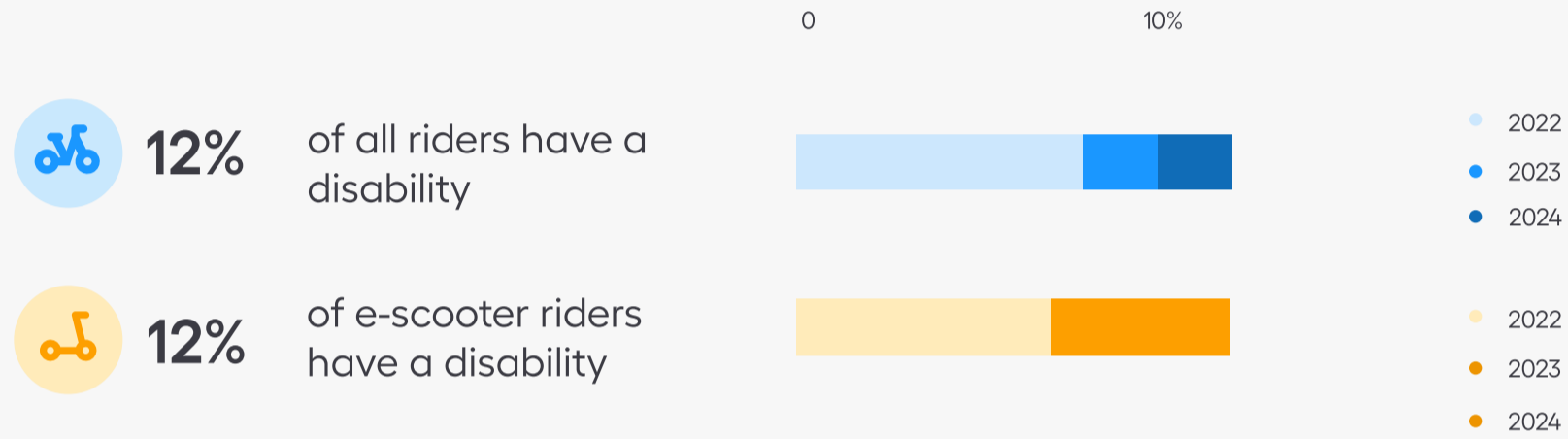
“I am a care worker and I have to cycle to and from work every day... an electric beryl bike is way less tiring.”



Accessible transport

63% of riders said Beryl has enabled them to take journeys they wouldn't have otherwise taken. This reflects anecdotal feedback obtained from riders that suggests electric vehicles can be helpful with certain mobility issues.

Beryl riders with disabilities:



There was a 1% increase in the number of respondents who identify as having a disability this year. Although a modest rise, it builds on the 2% increase in 2023 and indicates that our services are gradually becoming more accessible and appealing to individuals with disabilities.

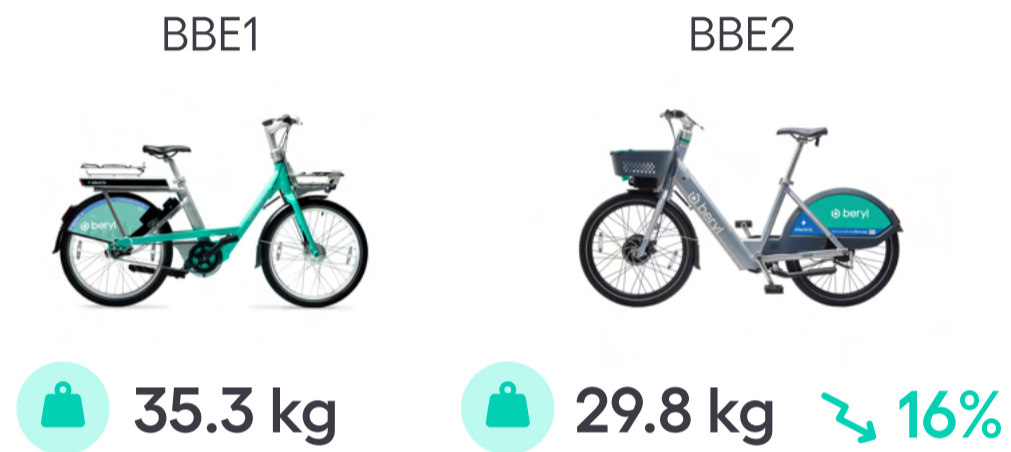
Rider quote

“I have COPD and was very depressed. Being able to cycle... has been instrumental in clearing my head, giving me a more positive outlook.”



Accessible transport

Beryl works hard to ensure this and launched the brand new BBE2 e-bike in September this year. The culmination of a well-established feedback loop between riders and local authorities, in-house mechanics and the Beryl design team, the e-bike is 16% lighter than the previous model.



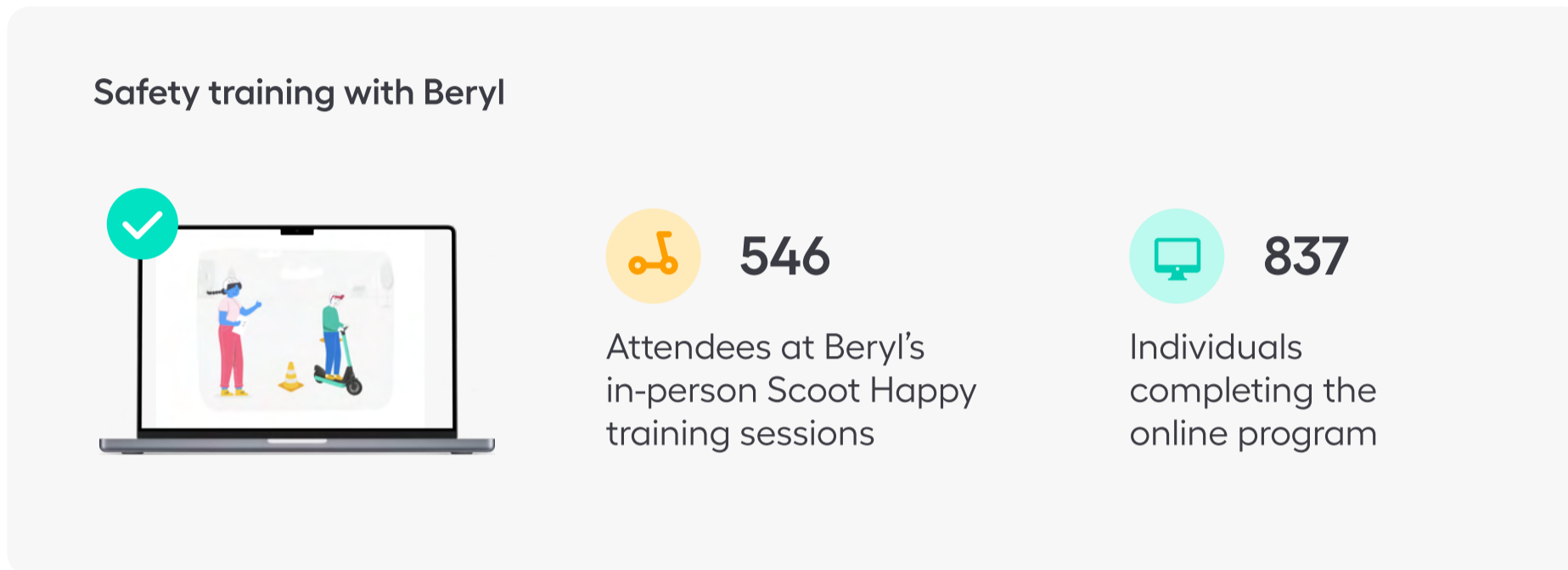
This is to help redress the gender imbalance, after vehicle weight was highlighted by women as a barrier to riding in previous surveys. Other accessibility features include a low-step through frame, an adjustable seat clamp and ‘safe start’ technology, ensuring a smooth first few pedals as the ride begins. A two-speed gear hub also provides automatic gear shifting throughout the journey, helping less familiar riders to always be in the right gear.

Rider quote

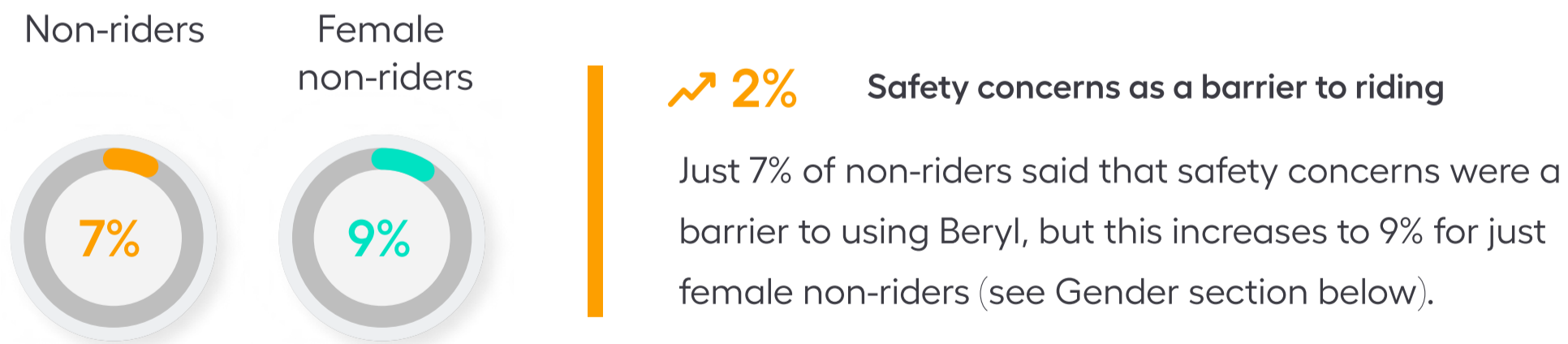
“I had a heart attack and two stents put in, the e-bikes make so much difference getting around town.”



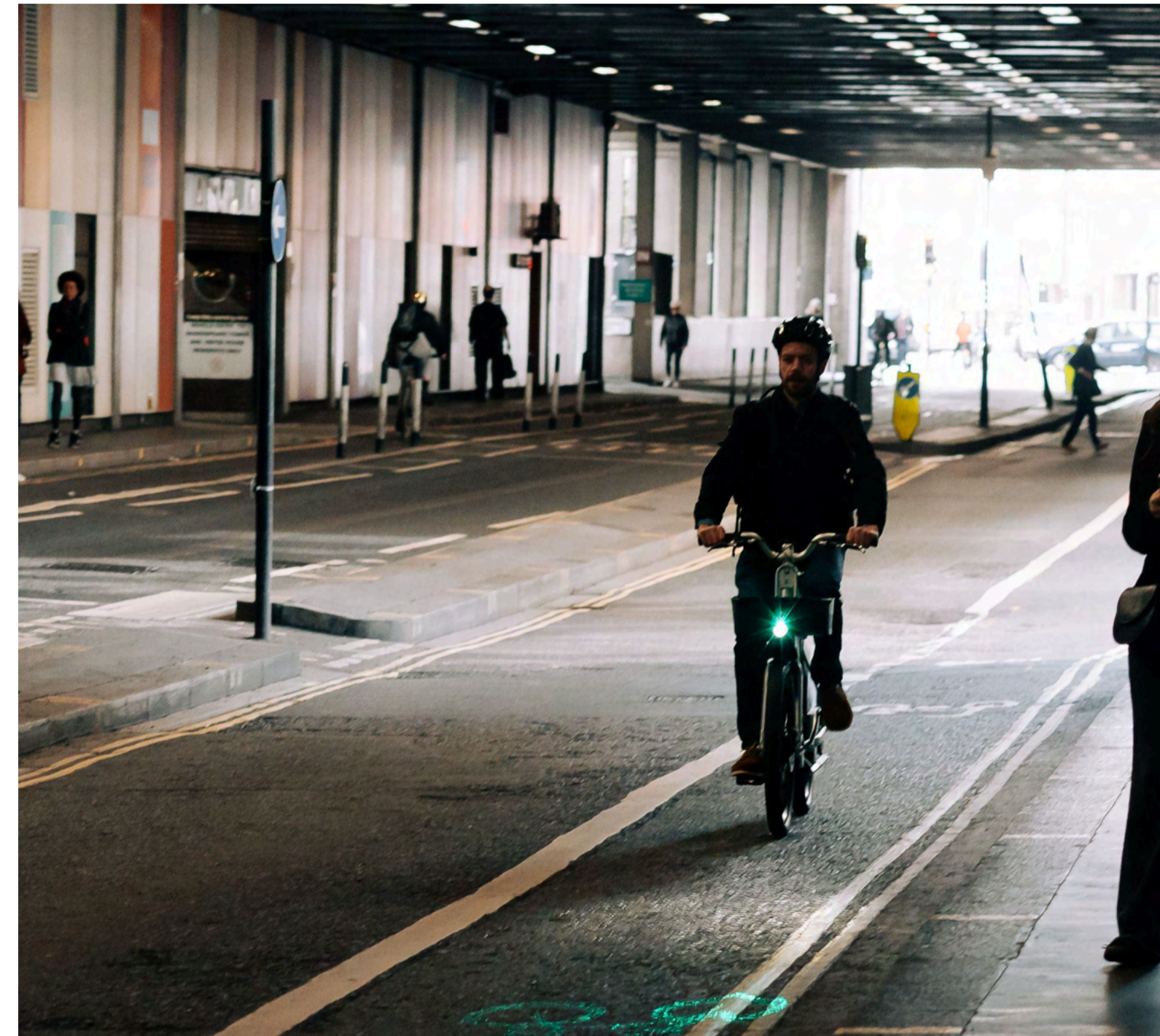
Safety is paramount to Beryl and the company works tirelessly alongside local authority partners and sponsors to ensure schemes remain as safe and as user-friendly as possible.



This year saw a record 546 attendees at the company's regular in-person Scoot Happy training sessions, with a further 837 individuals completing the online program. This strong uptake emphasises the effectiveness of providing accessible and multi-format resources in promoting responsible e-scooter use.



Safety concerns are a barrier to riding more often for just 5% of riders, a 1% drop on the previous year.



Rider quote

“The Beryl scheme has helped me get back from university quickly in the dark, helping me feel safer as a woman.”



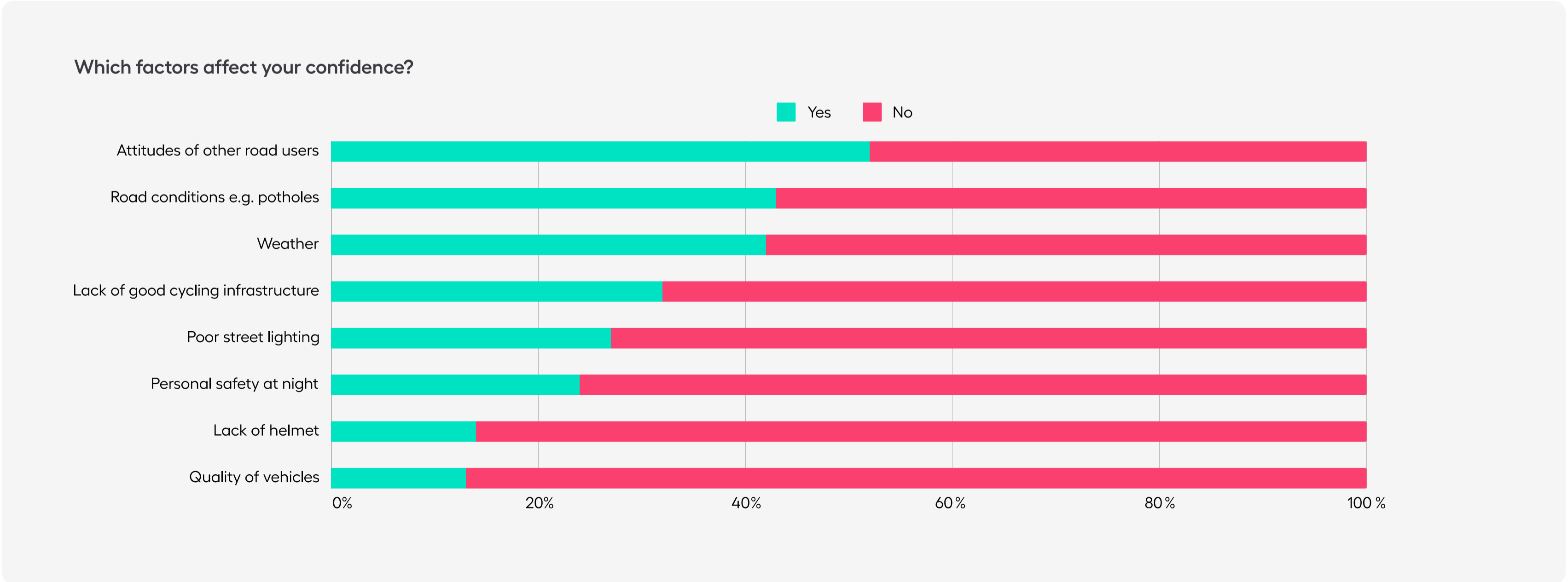
The attitudes of other road users (52%) and road conditions (43%) were the top factors affecting cycling confidence for non-riders, who also feel least confident in traffic on main roads (only 37% very confident).

Similarly, for all respondents who identified as having a disability, the attitudes of road users and road conditions were two of the biggest factors affecting confidence. Those factors increased by 5% and 7% respectively compared to last year.

This suggests a need for improved cycling infrastructure and safety measures on busy roads to increase user confidence. Beryl will continue to push for better cycling infrastructure across the UK, which will not only improve safety but also the perception of safety and could be key to getting more people out of their cars.

Non-riders say their confidence is most affected by:

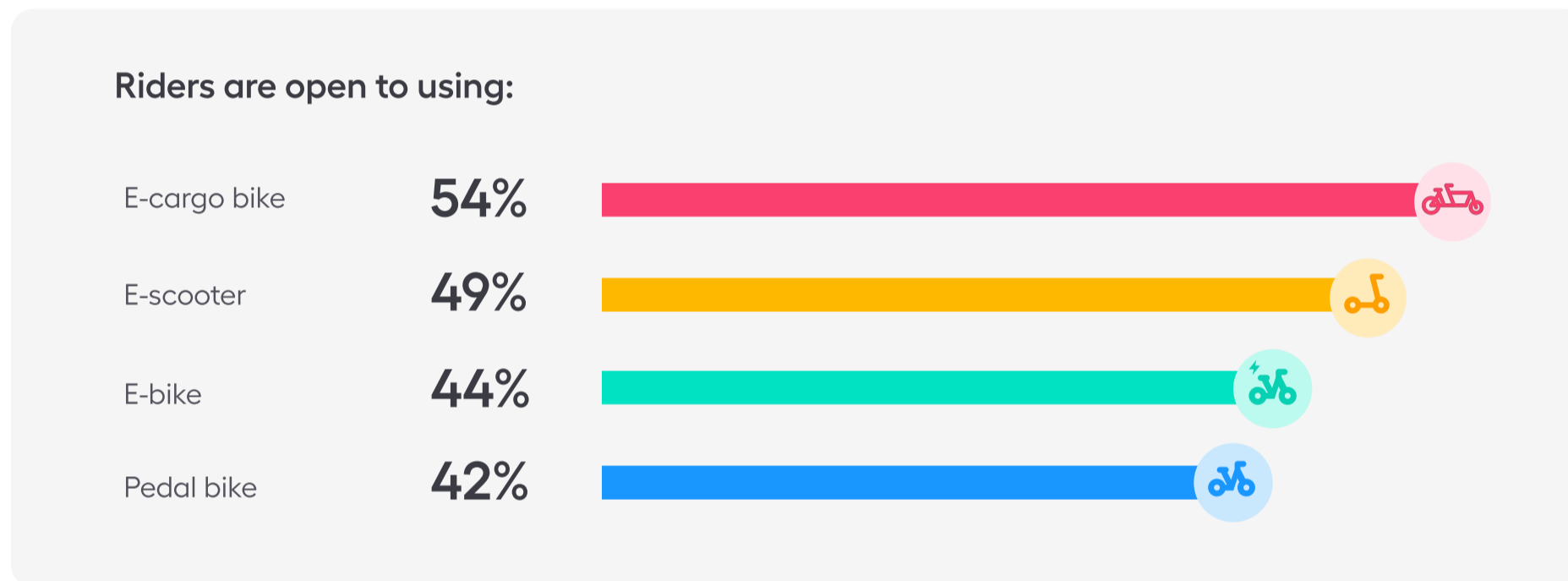
- 1 **52%** attitude of other road users
- 2 **43%** road conditions
- 3 **42%** weather



Multimodality

Riders and non-riders are curious about emerging transport technologies, with 54% on average willing to use e-cargo bikes. However, while 49% of riders are willing to use e-scooters, this drops to 31% for non-riders. The correct government legislation for e-scooters would help us to better meet this demand.

There is a general openness to using other modes of sustainable transport, with 44% of riders open to using e-bikes and 42% open to using pedal bikes.



The service is contributing to reduced car dependency, with 34% of riders reporting less frequent private car use.

 **900t** of carbon emissions prevented

 **445,000** litres of unleaded petrol saved

According to industry calculations, Beryl has helped prevent nearly 900 tonnes of carbon emissions since launch - the equivalent of more than 445,000 litres of unleaded petrol - and getting people to swap four wheels for two is a big part of this.



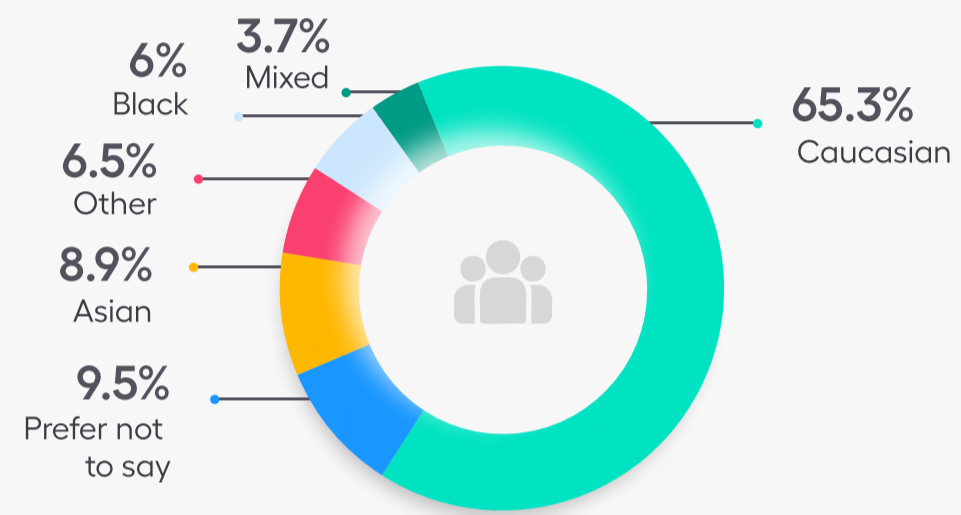
Using Beryl as part of a multimodal commute is something that appeals to 27% of non-riders, which demonstrates a high potential for integration with existing transport modes. This is important to Beryl, who prioritise integration with existing transport infrastructure when designing and delivering new schemes.

Rider demographics

Ethnicity

Beryl ridership is more ethnically diverse this year, with increases in the number of Asian (2%+), Black (3%+) and Mixed (3%+) riders.

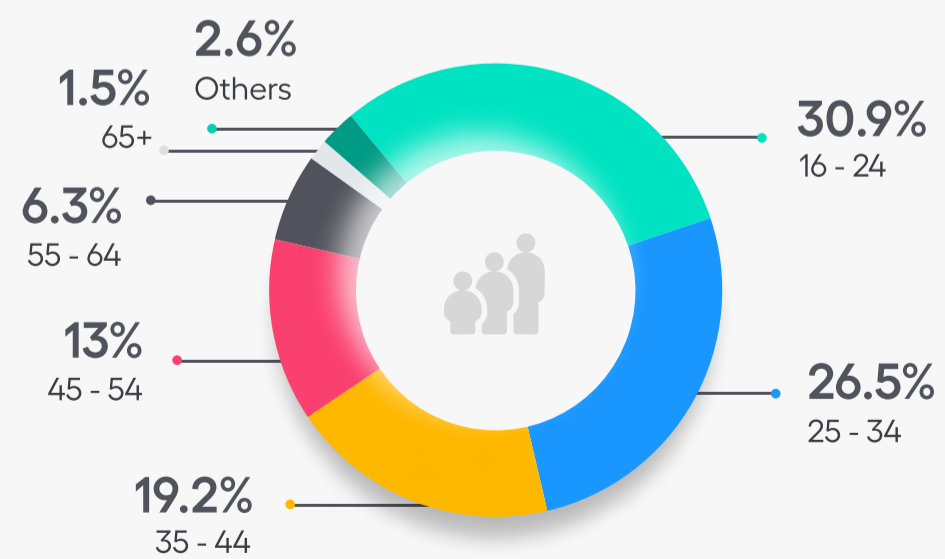
Rider's ethnicity:



Age

Beryl's user base is predominantly young, with 57% of riders being under 35 indicating a strong appeal to younger demographics.

Rider's age:

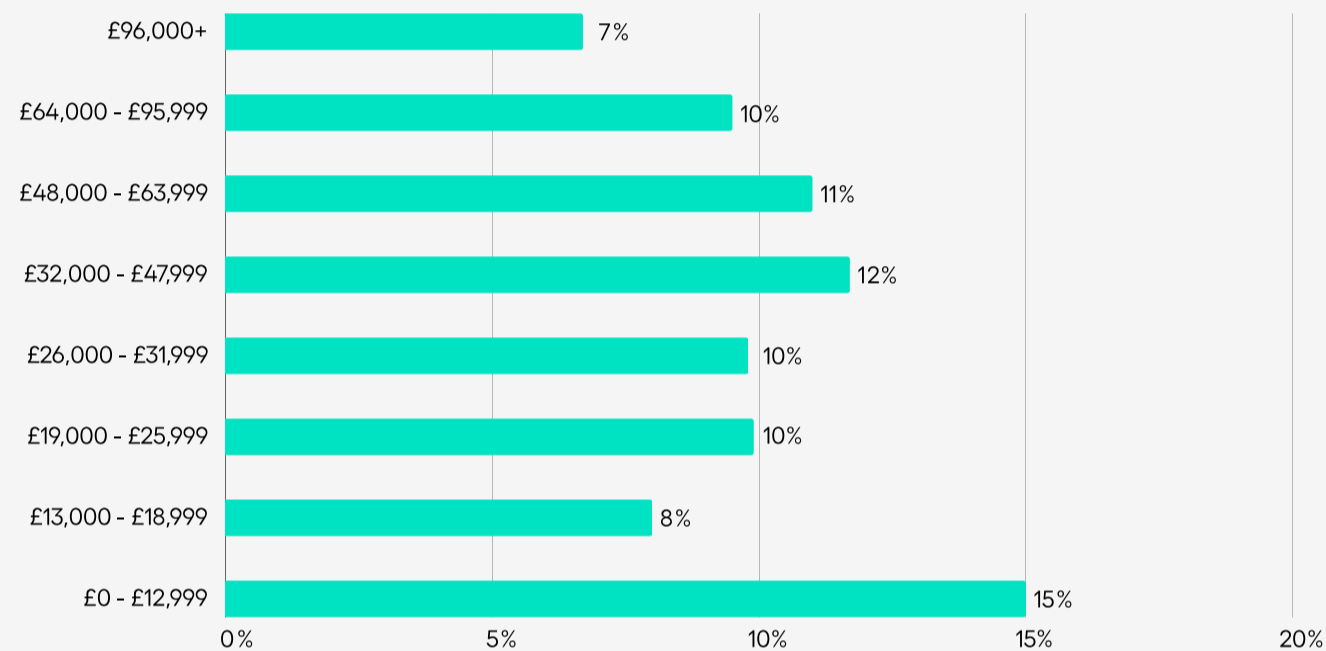


Rider demographics

Income

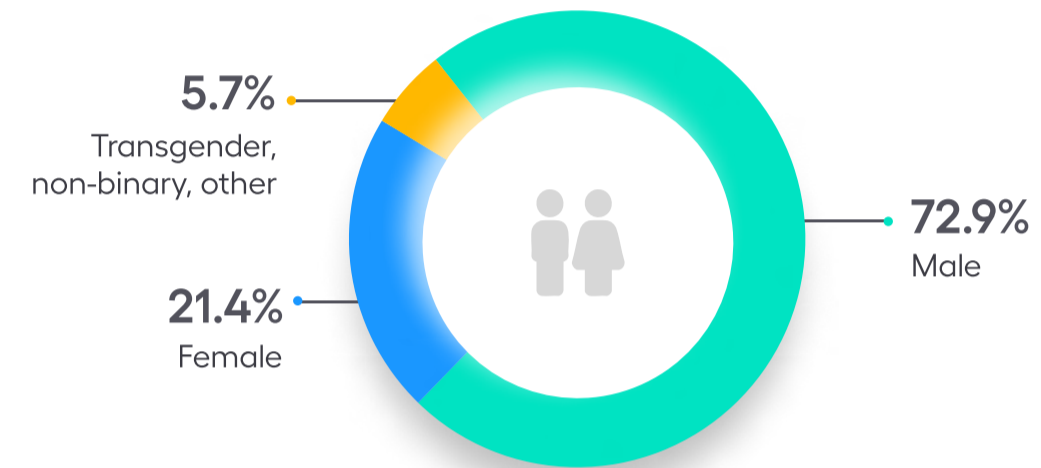
Riders also represent a fairly even split across all household income levels, with 15% earning less than £13,000 and 10% earning between £64,000 and £95,999.

Rider household income:



Gender

There is a greater gender imbalance for riders this year, with 73% male riders representing a 9% increase on the previous year. This mirrors national trends, with the latest CoMoUK Bike Share survey data showing a 5% increase in male respondents compared to the previous year.



There are 10% fewer female non-riders this year, but they do express higher safety concerns than males. More than twice as many female non-riders cite safety concerns as a barrier than male non-riders, suggesting that safety is more of a priority for women.

9% of female non-riders citing safety concerns as a barrier to taking a first ride.

4% of male non-riders citing safety concerns as a barrier to taking a first ride.

The survey also reveals a gender gap in perceptions of cycling infrastructure, with 9% of female non-riders citing a lack of suitable cycling infrastructure as a barrier, compared to just 5% of male non-riders. This suggests that women may be more sensitive to the quality and availability of safe cycling routes.



Rider quote



"Due to social anxiety, I sometimes avoid going to places as certain situations can trigger an anxiety attack, and so I have to get home as quickly as possible. But since I've started using Beryl e-scooters, I'm able to travel quickly to places and avoid busy areas, and I'm able to quickly jump on an e-scooter and go home if I become overwhelmed."



"When I couldn't get to see my daughter due to having no transport I used an e-scooter and it got me to see my daughter quicker than public transport would have."



"My disability makes public transport difficult and taxis are too expensive. Using Beryl vehicles has allowed me to be much less isolated."



"Using a Beryl bike just makes my day better."



"My health has also really improved as I exercise more and get more fresh air."



"I have severe mental health issues including severe anxiety and PTSD. Beryl is useful when I don't want to be crammed on a bus full of loads of people, then causing me to have an anxiety attack."



"Beryl has enabled me to get around my city with ease and is a good supplement for a patchy public transport system."



"It's saving me money and time."

Rider quote



"With ADHD I have had trouble getting to work on time... Now I can be occasionally late without having to plan ahead."



"I use a bicycle to provide care. When shifts make it inconvenient to use my own bicycle or I have mechanical problems, they are an affordable alternative."



"Beryl has enabled me to get to work more safely when I start at 4am, as I don't have to worry about walking for 25 minutes in the dark."



"Using Beryl has revolutionised my commute to and from work, making it easier, quicker, more efficient and more green!"



"Great fun to use and get about on while on holiday, without the worry of finding somewhere to park."



"I have chronic fatigue after brain surgery... using beryl e-scooters and bikes allows me to reserve my energy."





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