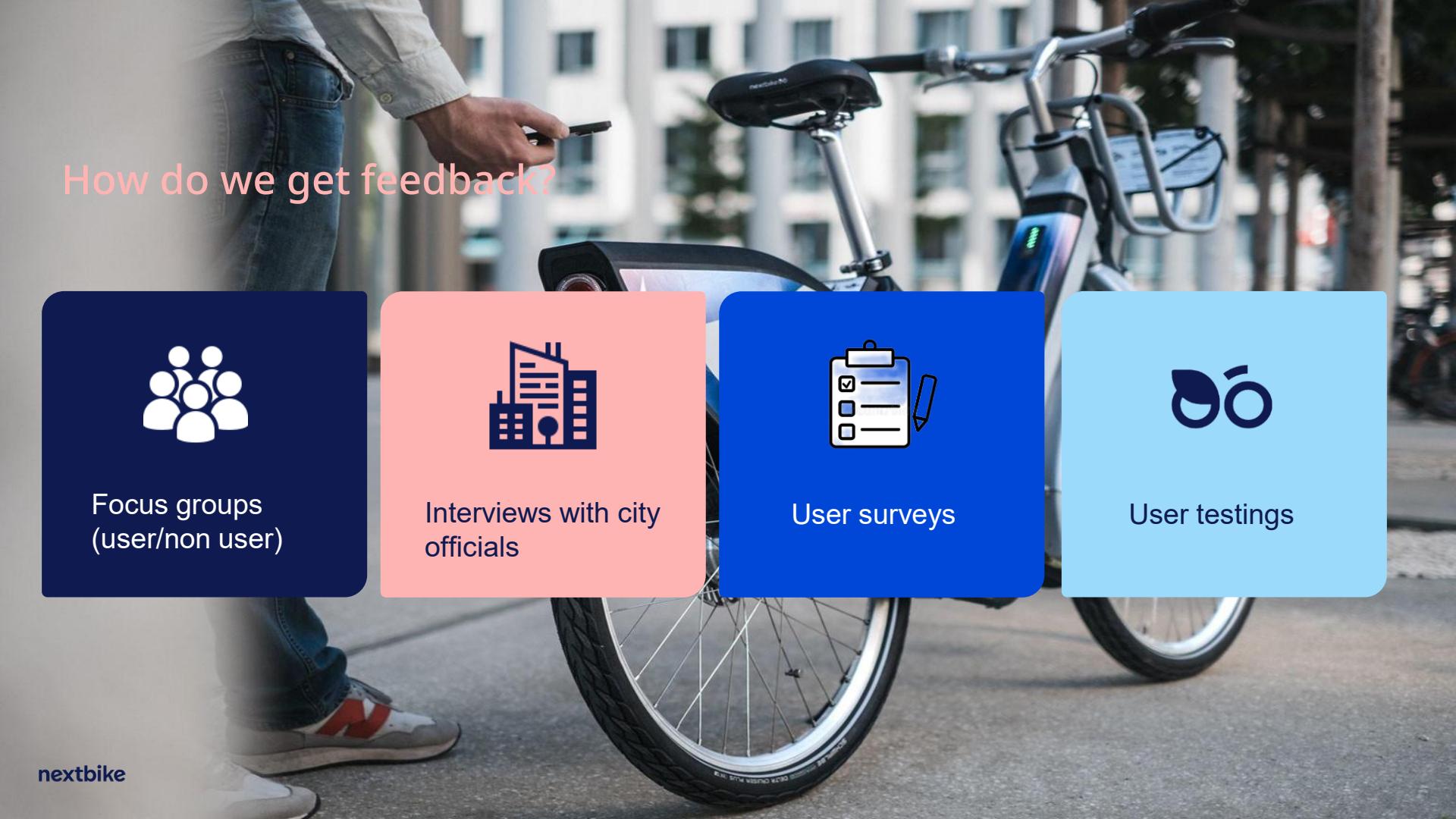


# Listening to clients and users

Designing a public bike sharing scheme based on professional B2C and B2B research!



## How do we get feedback?



Focus groups  
(user/non user)



Interviews with city  
officials



User surveys

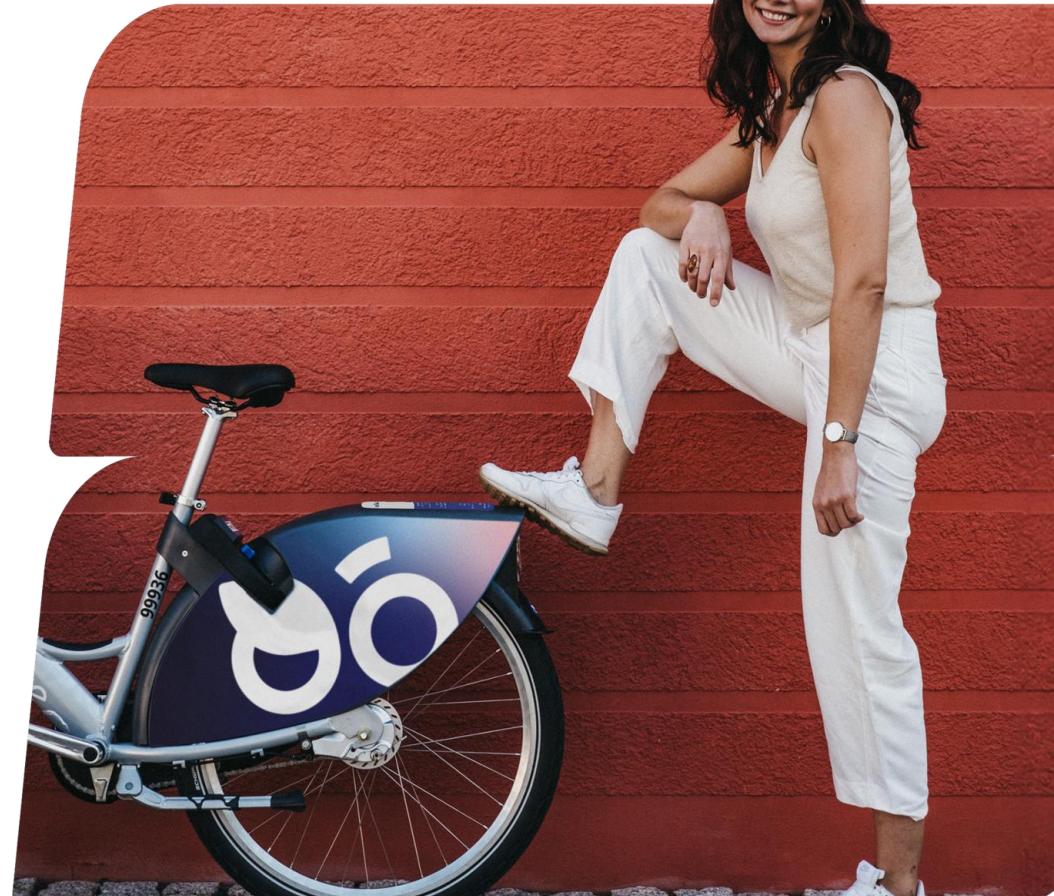


User testings

# User Feedback

# Mobility Survey

- 3 min online questionnaire
- 1 week duration
- via app news in Germany
- 1053 participants



# Mobility Survey

## Results

- 60% travel on foot or by PT  
no cannibalization -> complemetation
- 58% use nb if there is no bus/tram
- 80% combine bike sharing with PT
- 38% prefer MaaS integration
- 66% would pay more for PT subscription if bike sharing incl.
- Average trip 2-6km

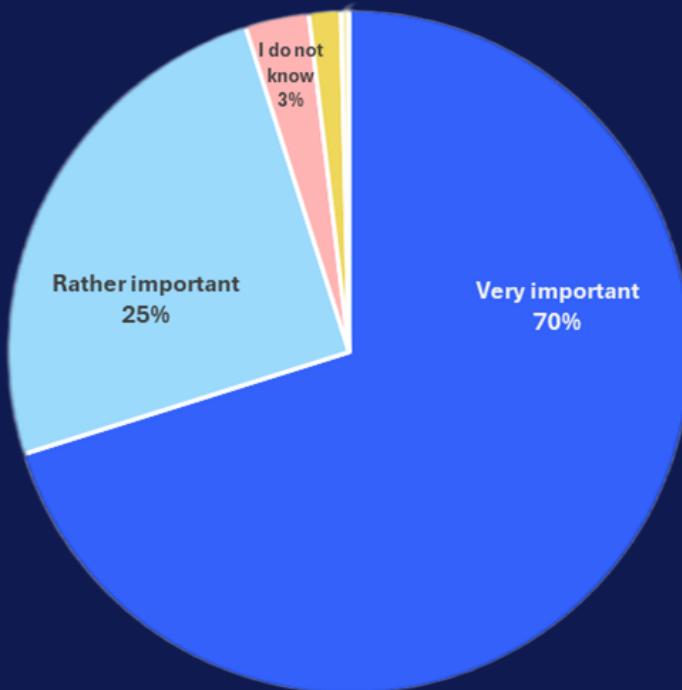


**Bike Sharing part of public transport**



# Mobility Survey

How important is a Bike Sharing Service in your city to you?



# Focus Group Interviews

Placing users at the heart of developing process

- Market research non-users and users
- Test studios Paris, Barcelona, Mannheim, Warsaw
- Two groups per city
- 6 frequent & infrequent bike sharing users
- 6 interested and lapsed users
- Good mix of gender, age, education level and living situation (city area / suburbs or village)
- Online diaries and mini group discussions



## Results

- Simple transparent pricing
- Well maintained
- Comfort
- Public transport Integration
- Quick check in and check out
- High dense availability
- Add ons (Basket, phone holder)

# User Testing

Slight adjustments high impact on comfort!

- 60 participants, all users
- Call for shorter persons under 1,70m
- Live testing of several bike types (reach, frame size, handle bar, seat position etc.)
- Focus on bike geometry and positioning ➔ Women prefer more upright, men bent position



# What Really Matters to Users



Price



Accessibility



Reliability



Integration



Comfort

# City Feedback

# 121 Interviews

Placing clients at the heart of operating

- Excl. online interviews 1hr with 25 city officials
- France, Germany, Poland, Spain, Italy, Cyprus, Belgium, Bosnia, Slovenia
- Partners and non partners
- Diverse mix of city sizes and bike-sharing maturity levels
- Focus on operational experience and strategic planning



## Results

- Reliable collaboration
- Responsibility
- Monitoring and Reports
- User Data
- Well maintenance and rebalancing
- MaaS Integration
- Marketing and Planning Support
- City Corporate Design



## What Cities Want



Transparency



Responsibility

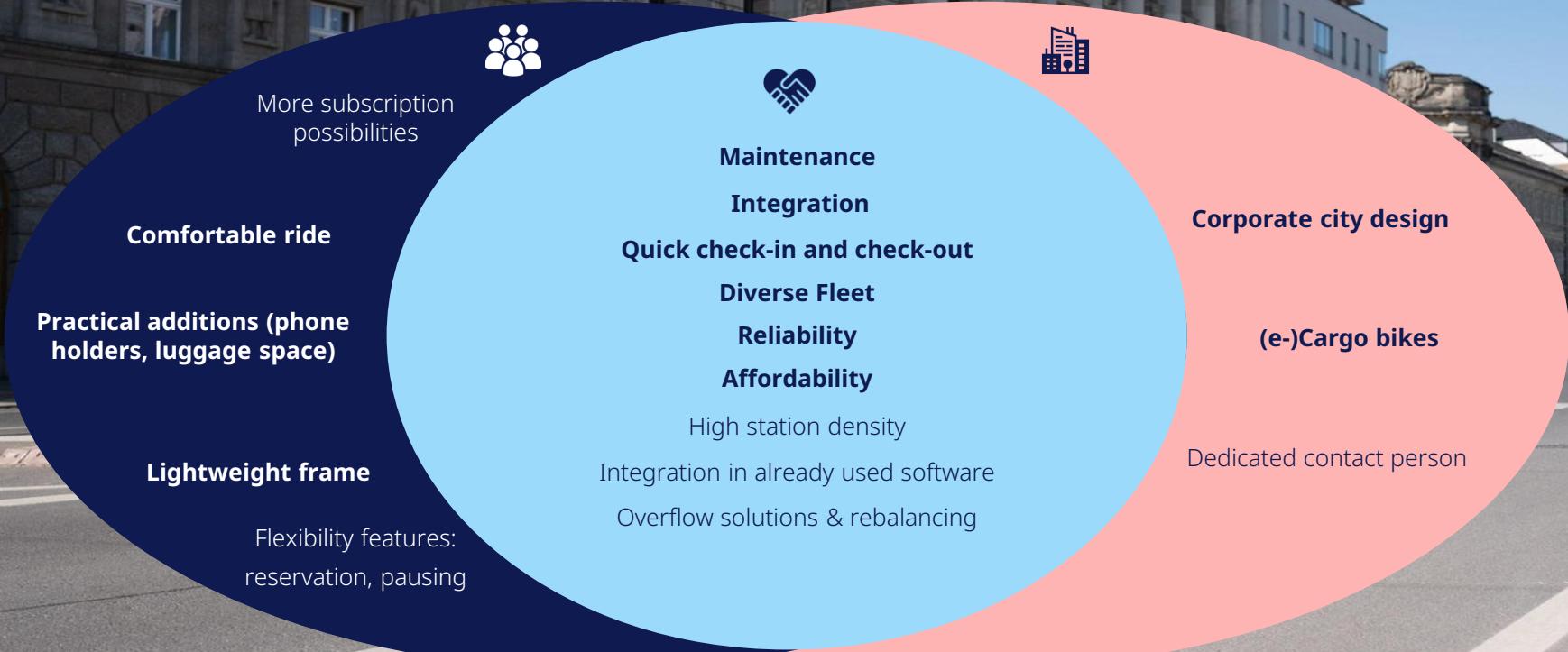


Reliability



Data

# User and city needs match in most perspectives



## Conclusion

- Users first (Cities+Operators)
- Contract based collaboration (subsidies) ➔ SLAs, Reliability, Availability, Social Tariffs
- Integration in urban planning ➔ mobility concept, climate concept (Public Service, Public Space, Public Transport)



# Let's get in touch

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