

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 -> complementation
- 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

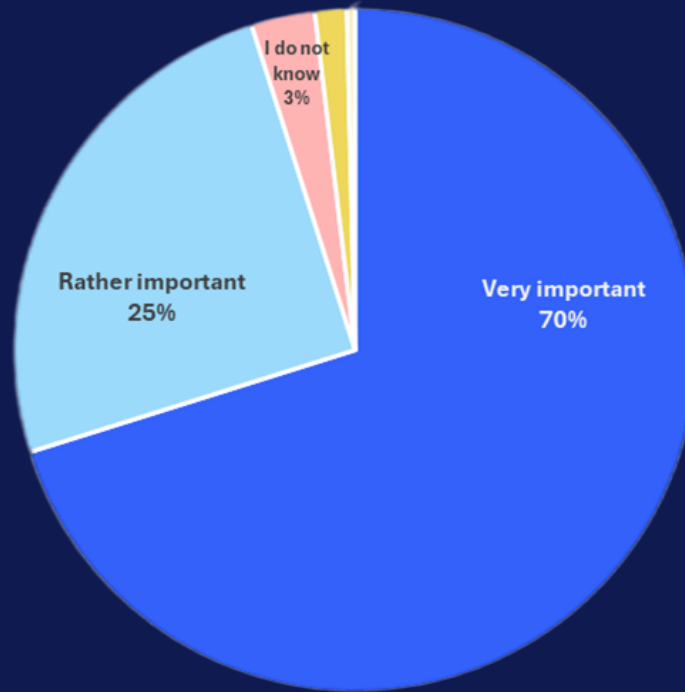


Bike Sharing part of public transport



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



More subscription possibilities

Comfortable ride

Practical additions (phone holders, luggage space)

Lightweight frame

Flexibility features:
reservation, pausing



Maintenance

Integration

Quick check-in and check-out

Diverse Fleet

Reliability

Affordability

High station density

Integration in already used software

Overflow solutions & rebalancing



Corporate city design

(e-)Cargo bikes

Dedicated contact person

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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