



Rider Report 2023



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Introduction

from Phil Ellis, Beryl CEO

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We're really proud of our achievements this year. We've launched more new schemes and deployed more new vehicles than any previous year, all in partnership with some of the country's leading authorities. We've also expanded a number of our existing schemes and delivered a range of important initiatives, such as our Women's Tour.

By working closely with towns and cities and, just as importantly, listening to our riders, we've already contributed significantly to breaking down the barriers to active travel and decarbonising transport networks. Across all of our schemes, we've generated over 5.5m sustainable journeys and saved over 560 tonnes of carbon emissions.

This is our fourth annual Rider Report and, just like the previous three, it is packed full of interesting threads that reflect both the company's progress and external economic and social factors.

Many of our newer schemes are primarily e-bike based. They are fun to use and the extra power provides a lot of benefits, especially in hilly areas such as Brighton and Cornwall. We can see the impact of this when we analyse motivational factors, with fun and novelty more important to riders this year than in 2022. E-bikes are our best tool in the long hard battle to encourage a culture shift toward active travel.

We try to provide more flexibility and choice, so it's great to see that riders value the multimodality we offer and how that can impact positively on getting people out of their private cars.

In our government e-scooter trial areas, riders prefer them to other modes. Proper legalisation would realise their untapped potential, making them more accessible and boosting their popularity. This would amplify calls for better infrastructure, improving safety and the perception of safety. The increased importance of safety this year shows that it could be key to getting people out of their cars.

In January, we launched our Women's Tour events and I am delighted to see this coincide with an increase in women riders this year. We have also seen an increase in disabled riders, although they face the most barriers to riding.

This year, more people feel that there are barriers to riding more often, with availability and cost being the two biggest reasons. With several of our new schemes surveyed during early stages of phased rollouts, I'm confident that the greater numbers of vehicles, increased in service areas and introduction of cheaper pricing options can help to reverse this disappointing trend over the coming months.



Ultimately, a successful operator is one that not only listens to its riders, but also uses their feedback to shape future delivery and improvement. I promise you that Beryl will continue to do this into 2024 and beyond.

Methodology

We surveyed riders across 12 scheme areas that were live, compared to just six areas in 2022. The schemes newly surveyed this year were Brighton, Cornwall, Hertsmere, Plymouth, Portsmouth and Southampton. All of these schemes have been launched since the 2022 survey was undertaken. The survey was sent to riders via email and within the Beryl app and we collected over 3,000 responses. Of these respondents 20% had signed up but not yet taken a ride, while 80% had taken at least one ride.



Key findings

Swapping out four wheels for two



More people are replacing private vehicle trips with Beryl trips, with 56% of respondents having done so, which is up 10% from 2022.

Boosting cycling engagement



Using Beryl has a positive impact on cycling habits for both existing and new riders, with 38% of those that already cycled before signing up cycling more since using Beryl.

Empowering mobility with e-scooters



The number of e-scooter riders with a disability has almost doubled this year, suggesting they are the preferred mode of sustainable transport for people with certain mobility issues.

More important to riders than in 2022:

↗ 13% Convenience

↗ 11% Speed

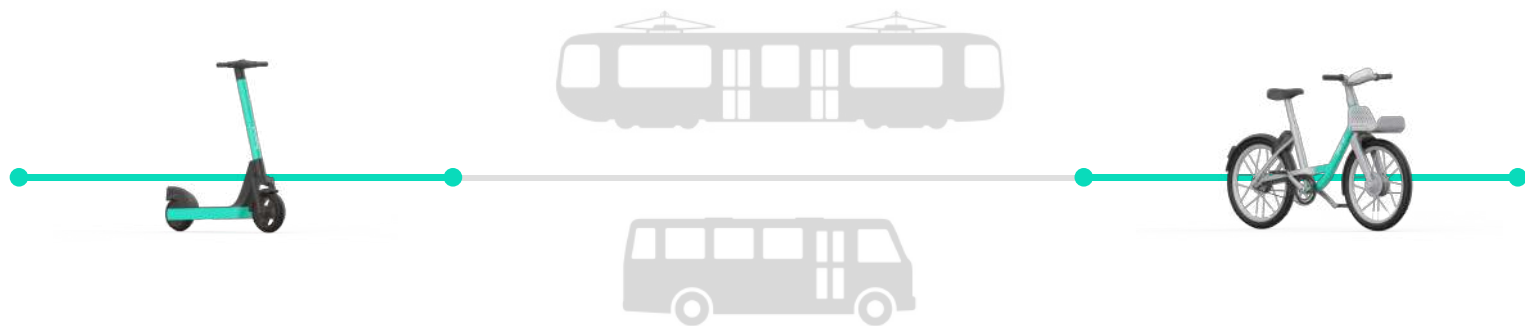
↗ 15% Novelty

↗ 10% Fun

- When choosing to sign up, convenience and speed are more important to users this year than last, increasing by 13% to 48% and 11% to 36% respectively.
- Novelty and fun are a lot more important to riders this year, increasing by 15% to 35% and 10% to 33% respectively, compared to 2022.

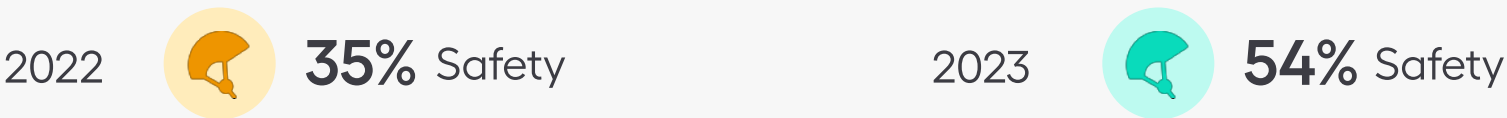


Key findings



First and last mile Beryl journeys are more popular than full commuting this year, suggesting bike share is becoming more integrated within urban transport systems.

Safety is even more important to riders, who cite it as 19% more important than last year:



Offering riders more choice is more likely to get them out of their cars, with 41% of riders that have used three modes having done so, compared to 29% of riders that have used one mode.

There are encouraging demographic changes:

3% increase in female riders

2% increase in riders with a disability



Motivation: Why do people ride?




Shared sustainable transport has a wide variety of benefits. It's flexible, convenient, fun to use and cost-effective compared to private car use. It's often a combination of these factors that encourages people to sign-up and then continue to use our services.

Convenience is the key motivator for people to start using Beryl, with 48% of all respondents that have signed up citing it as the main reason for doing so. That's a 13% increase from 2022.

Convenience continues to be important after signing up, with 97% of those who have signed up and taken a ride citing it as 'very important' or 'somewhat important', compared to 89% in 2022.

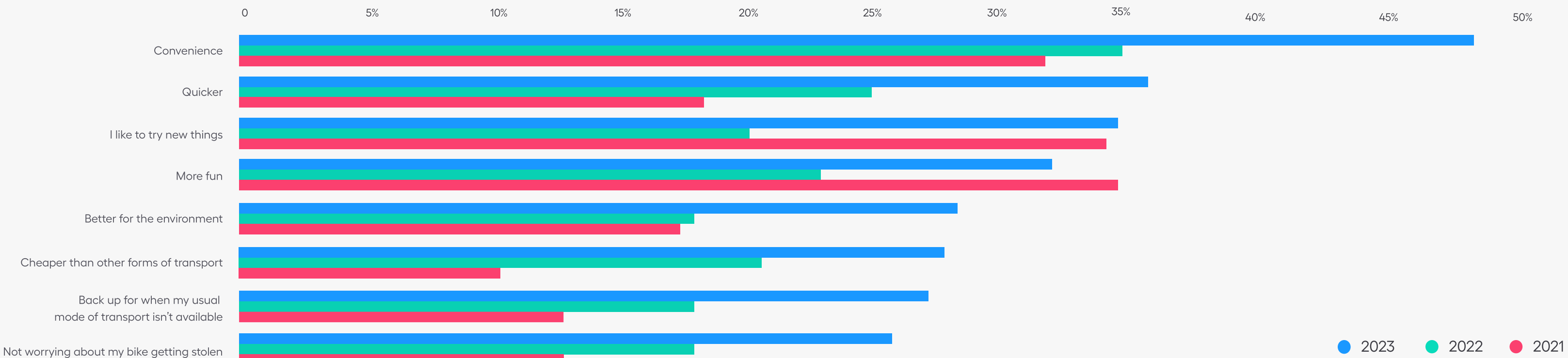
Convenience is an even bigger factor for e-scooter riders, with 99% of them citing it as 'somewhat important' or 'very important' when choosing what mode to use, compared to 90% in 2022.

The top reasons for signing up are:

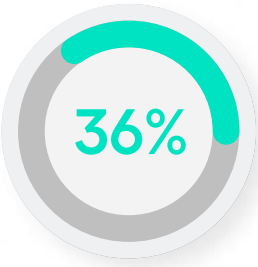
-  **48%** Convenience
-  **36%** Quicker
-  **35%** I like to try new things



Why did you decide to sign up for Beryl?



Motivation: Why do people ride?



Speed is still the second most important factor for signing up to use Beryl and has increased significantly from last year, moving up to 36% from 25% in 2022.

Rider quote

I’m always running late, so having a Beryl bay near my house is absolutely amazing, if there are scooters available I can meet my friends on time AND not be sweaty!

Additionally I live at the top of a steep hill, if I’m tired on the way home or have a heavy bag, getting a scooter home is so much easier, it also makes me feel safer in the dark if I’m coming home by myself to get onto an e-vehicle so I can move more quickly.



↑ ★ 15% Novelty ↑ 😊 10% Fun

Novelty (I like to try new things) and fun have increased by 15% and 10% respectively compared to 2022. Novelty is now the third most important factor overall for signing up, compared to the fifth in 2022. Novelty is also the top reason for those who have signed up but haven't yet ridden and is one of the main motivations for riders to use e-bikes.



Motivation: Why do people ride?



The increase in fun and novelty is being driven by e-bike riders and coincides with the launch of several new e-bike schemes in the past year, including **Solent, Cornwall, Brighton and Plymouth.**

Fun is the top reason for people signing up in the Isle of Wight (52%) scheme, while novelty is the top reason for sign ups in the Cornwall, Plymouth and Southampton schemes.

Rider quote

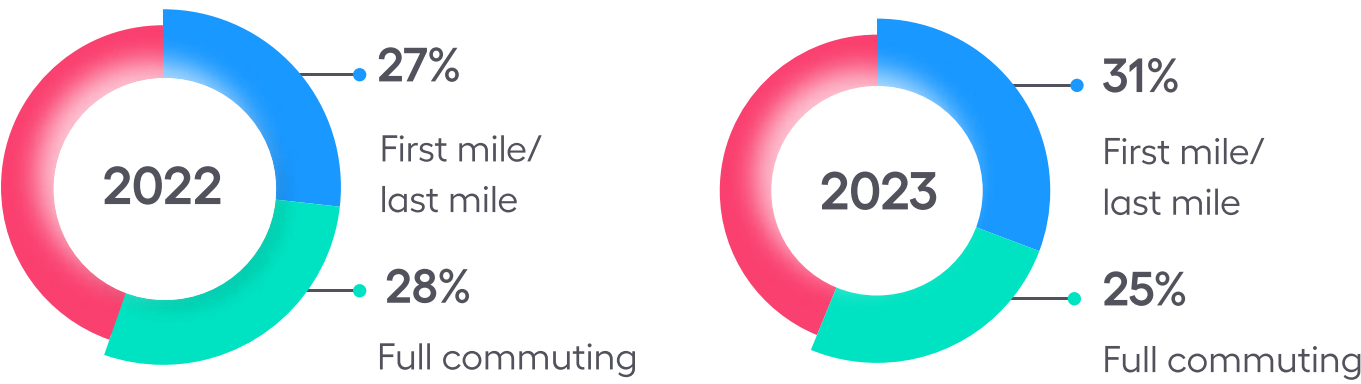
“On a weekend when the traffic was insane and we wanted to go to the beach but not worry about parking or traffic, we decided to take a Beryl and it made it fun. We were like a little convoy of Beryls heading to the beach. Made for quite the giggle!”



Connectivity: First mile, last mile wins

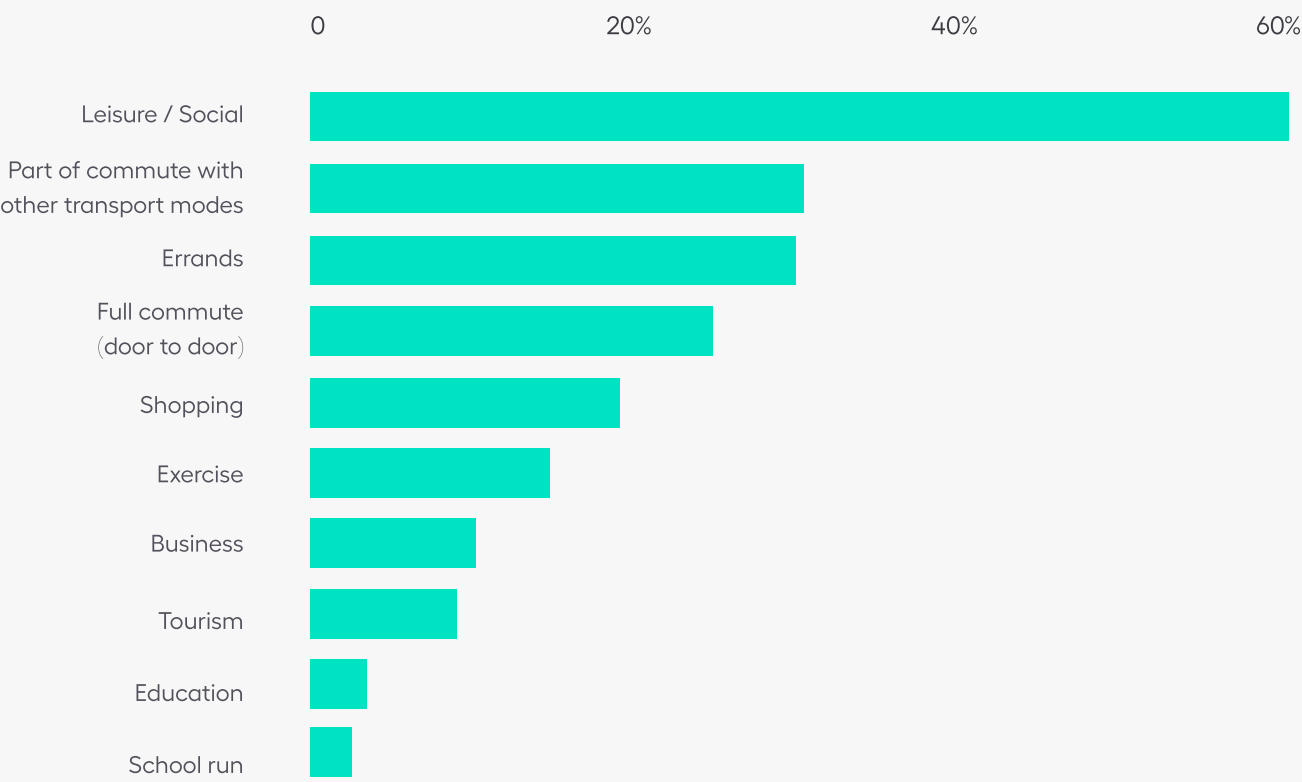
Our schemes are delivered in partnership with local transport authorities to ensure maximum integration with existing public transport services. By ensuring this, we can provide the best service possible and encourage as many people as possible out of their cars.

We already knew that convenient and sustainable transport is an integral part of linking with other modes. We asked riders how they used Beryl to complement other modes when commuting and have seen an increase in this kind of travel over the past year.



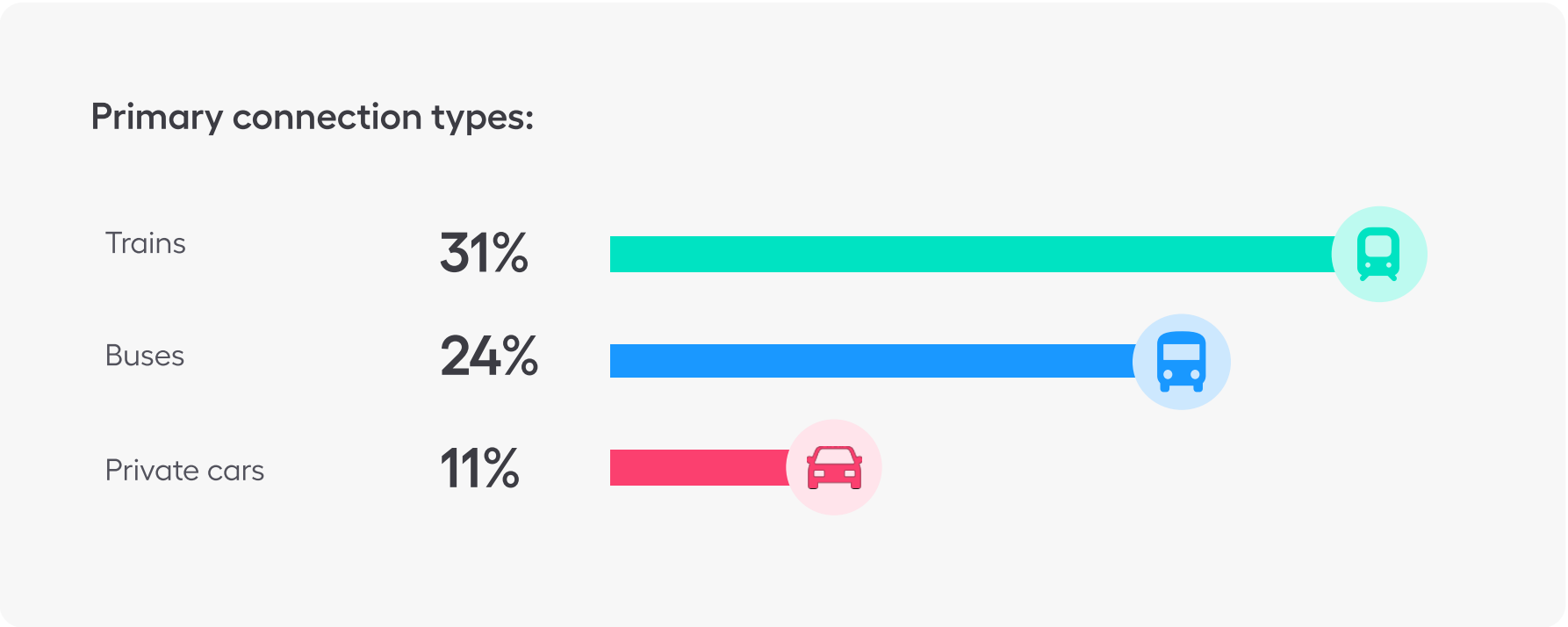
31% of riders now do this, compared to 27% in 2022 and it is more popular than full commuting, which has dropped to 25% from 28% in 2022.


When you ride our vehicles, which types of journeys do you take?



Connectivity: First mile, last mile wins

Partial commutes are the second most popular journey type this year, overtaking errands and full commutes. Our riders are most likely to use Beryl to connect with a train journey, with 31% saying that they had done so. Bus is the second most popular with 24% and private cars the third with 11%.




2.5 km

Users who connect their journeys with public transport take shorter trips, with the average journey distance 2.55km, confirming Beryl vehicles’ suitability for first and last mile journeys.

We work hard with local authorities and stakeholders to ensure that our schemes can form an essential cog in integrated urban transport schemes. These findings demonstrate how we have been largely successful in doing this and prove that shared transport is viewed as a practical option for riders.

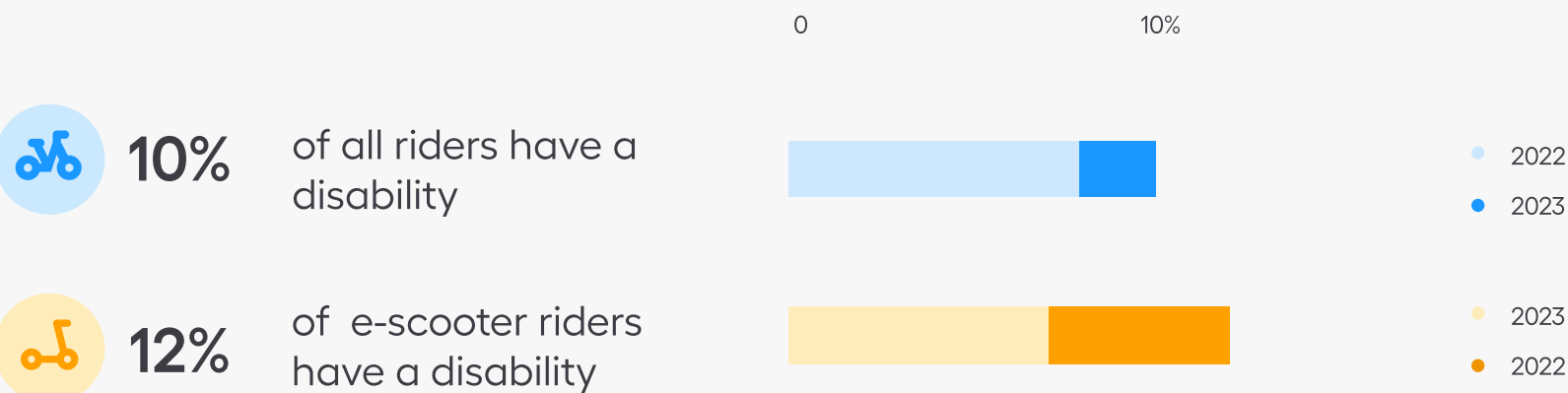


Accessible transport

We believe shared transport should be made as accessible to as many people as possible. As part of the design process, we consult with local charities, stakeholders and disability groups and use the feedback to inform service delivery.

10% of our riders have a disability, an increase of 2% from the 2022 data. This increases to 12% for e-scooter riders, compared to just 7% in 2022. These responses suggest that e-scooters can be a more suitable way of travelling sustainably for people with certain mobility issues, lending more weight to the argument for them to be legalised.

Beryl riders with disabilities:



17% of people that have signed up but haven't yet ridden have a disability. Just 11% of active riders have a disability. This suggests people with a disability face more barriers to riding.

Non-riders with disabilities say their confidence is most affected by:

- 1 58% attitude of other road users
- 2 48% road conditions
- 3 38% the weather



Accessible transport

Riders with a disability are a lot less confident on main roads, with 38% ‘not very confident’ or ‘not confident at all’, compared to just 28% of overall riders. This is also the case on minor roads, with 17% not confident compared to 11% overall and in the dark, with 27% compared to 22% overall.

To help improve rider confidence and knowledge around riding in the colder, wetter weather this winter, we are running an awareness campaign to provide riders with useful advice and information.

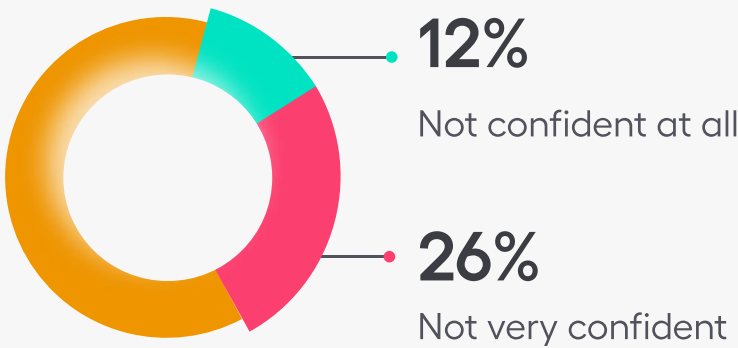
The introduction of e-bikes, with their electric power assist, into areas such as Brighton and Cornwall will help make cycling easier and more accessible in hilly areas.

Rider quote

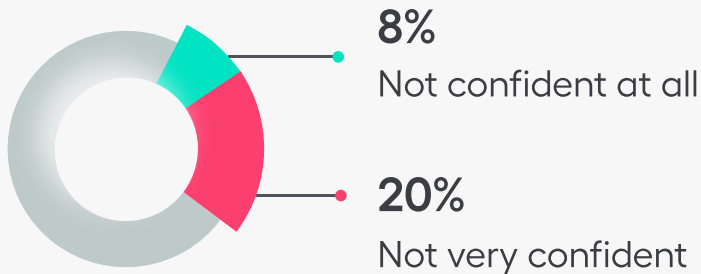
I have several health issues and limited mobility. Your scooters are such a valuable lifeline to me and give me a lot more freedom ❤️



Confidence on main roads:

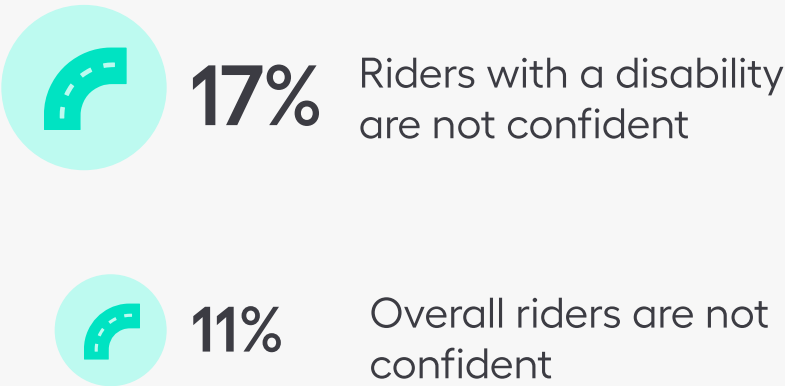


(Riders with disabilities)

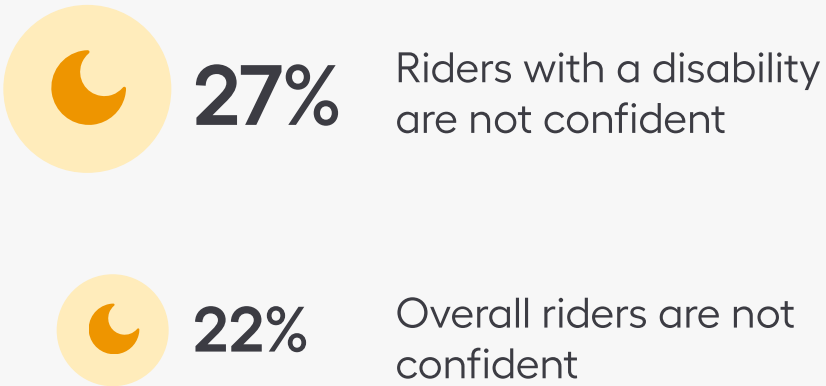


(Overall riders)

Confidence riding in minor roads:



Confidence riding in the dark:



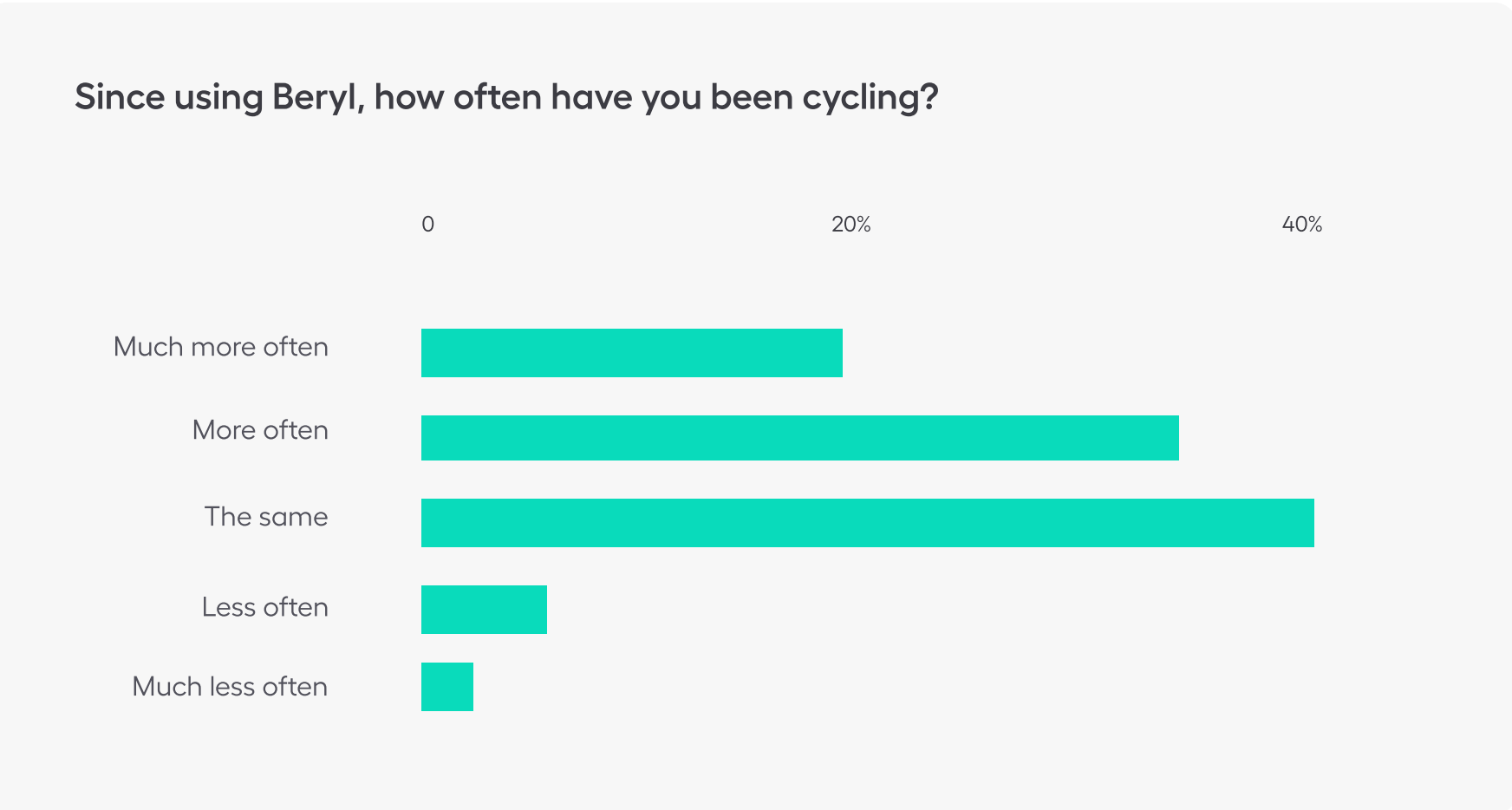
Behaviour change

The introduction of shared transport into a town or city can help remove the barriers to active travel for many riders. This can lead to an increase in the adoption of more sustainable long-term travel habits, helping to reduce traffic congestion and carbon emissions while improving public health.

Riders are cycling more often now than before using Beryl. This doesn't just apply to riders who are new to cycling. This shows that Beryl vehicles complement private bike ownership and have a motivational impact on both new and existing cyclists.

53% are now cycling 'more often' or 'much more often' since they started using Beryl.

56% replaced a car, van or taxi trip with Beryl **↗ 10%** from 2022.



57% of respondents already cycled before signing up.

 **38%** of those are cycling more since using Beryl.

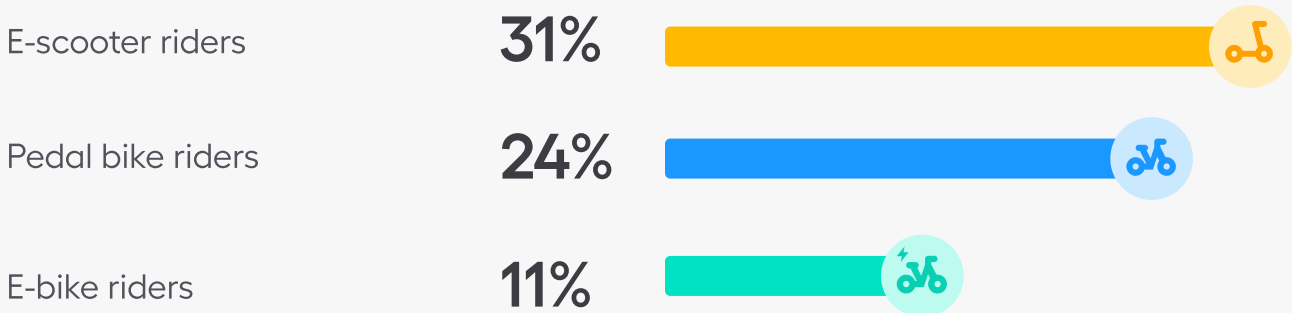
Rider quote

I’m a car driver, who lives on the outskirts of Hereford. I find Beryls a brilliant alternative to driving or catching the bus into town centre at peak times. They’re an amazing concept, glad it’s working out in Hereford. I used my own bike for some rides in the past but Beryl means you don’t have the added stress of locking and leaving bike.



56% of respondents have replaced a car, van or taxi trip (either as a passenger or a driver) with a Beryl trip, which is up 10% from 2022.

Who is most likely to replace a car trip?



71%

of respondents who replace car trips with e-scooter trips are making journeys of less than 4km.

73%

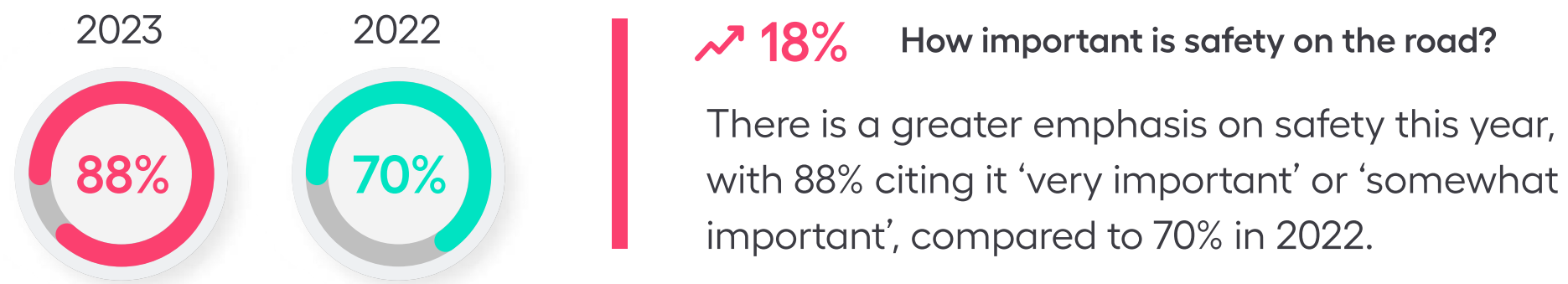
of respondents who use e-scooters for shopping and errands have replaced a car trip.

Although only 3% of Beryl users connect their journey with a shared car or car club, more than half (53%) of those who do say that they have reduced or stopped their private car usage. This is more than any other connection type and coincides with Beryl launching a partnership with Enterprise Car Club in January this year and launching in Plymouth as part of the city’s Connect Plymouth project in March.



How do riders feel on the roads?

16.

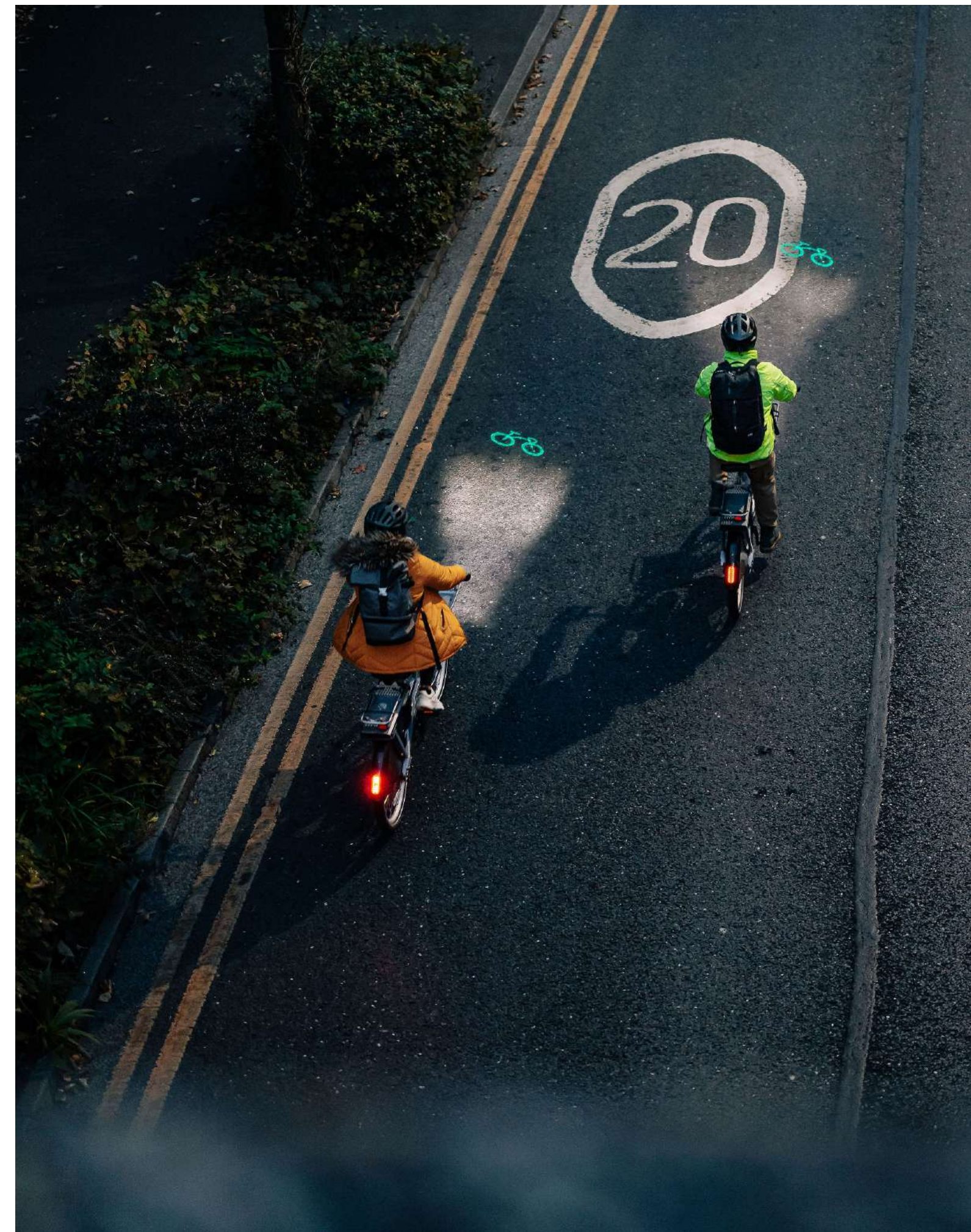


26% of respondents cite 'safety concerns' as the top barrier to trying e-scooters - up from 11% last year. This likely influenced by a number of factors, including the lack of proper e-scooter legislation.

70%

of users overall say they are either 'confident' or 'very confident' riding on the main roads, similar to 2022.

- We work hard to boost our riders' skills and confidence and, by the end of 2023, will have run 33 Scoot Happy events across five areas.
- These free events have provided 198 learners the opportunity to boost their e-scooter riding skills, offering hands-on teaching from qualified instructors.
- Back in March 2023, we also launched our brand new women-only Women's Tour events.



How do riders feel on the roads?

Infrastructure is still important, with 89% of riders feeling 'confident' or 'very confident' on cycle lanes, compared to 72% on main roads.

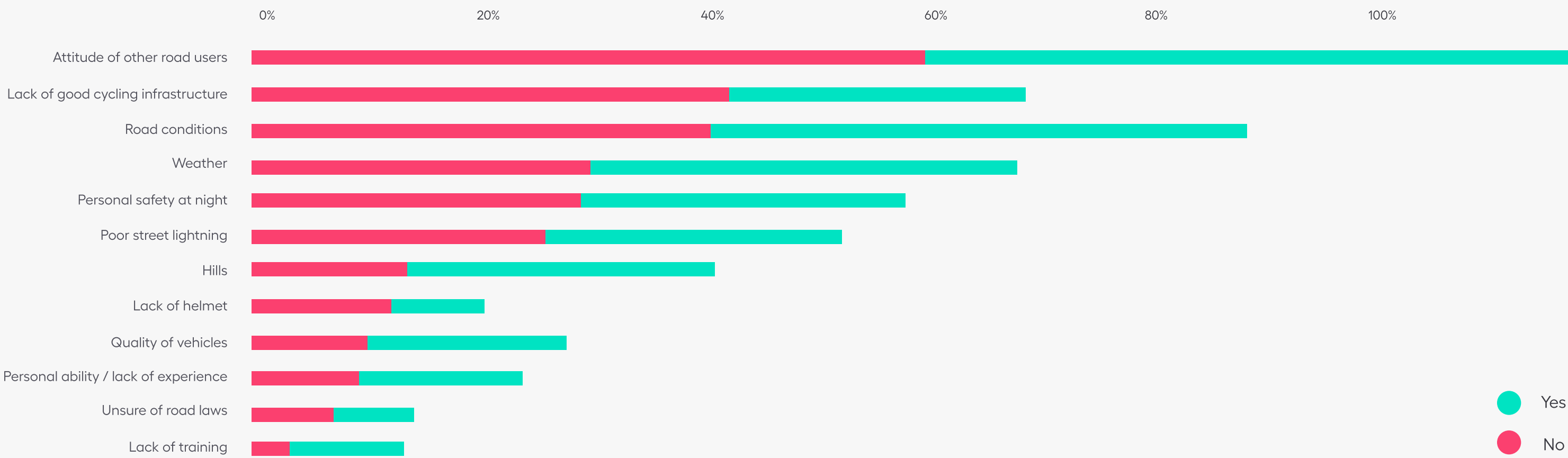
The 'attitude of other road users' is still the main factor affecting confidence for all types of vehicle riders this year. 'Road conditions' concern e-scooter riders slightly more than other modes and also have the biggest impact on non-rider confidence, affecting 56% of non-riders overall and 70% of female non-riders.

Rider quote

I signed up to a Scoot Happy workshop and it was brilliant - for a small donation, you get two hours of tuition plus 400 mins included. I'm now confident to ride an e-scooter and look forward to using them more often.

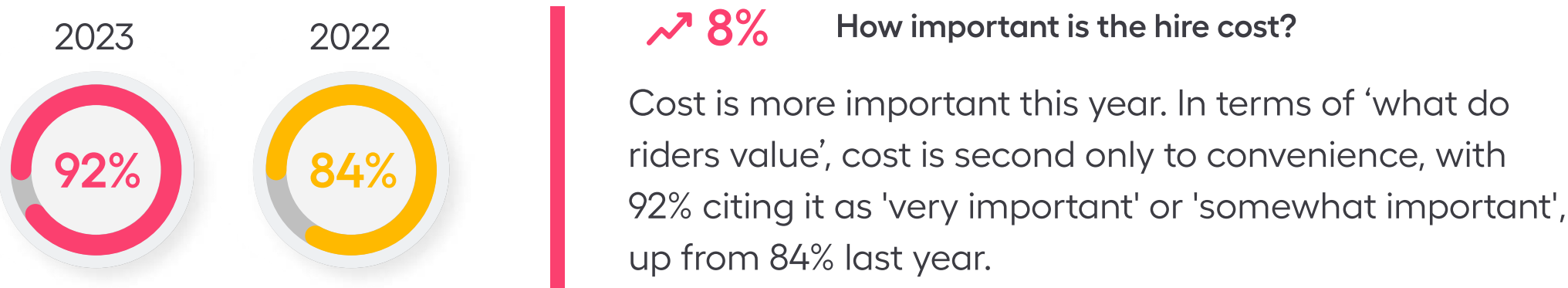


Which factors affect your confidence?



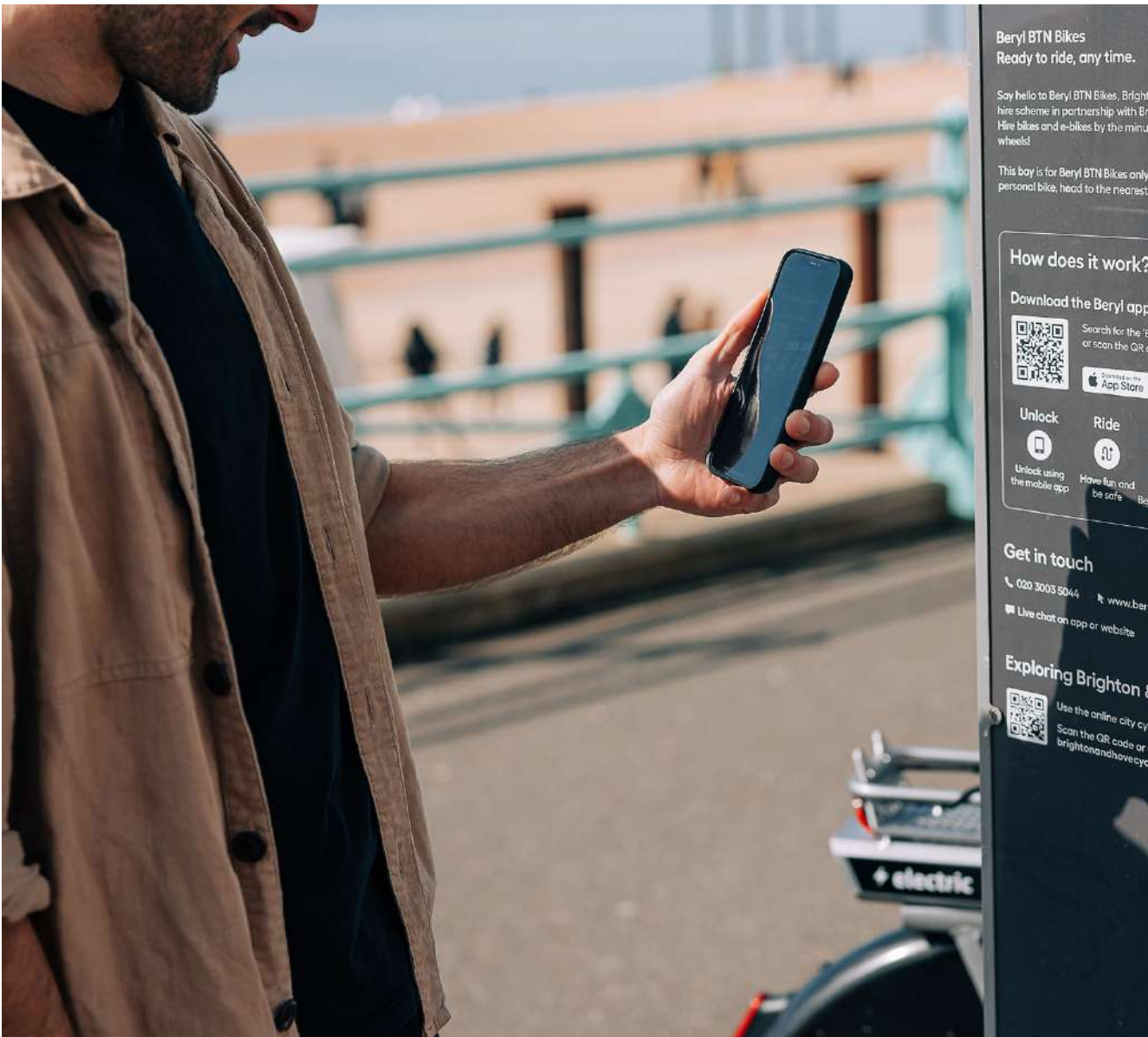
The impact of the cost of living

With the cost of living still high across the UK and showing no signs of reducing anytime soon, it's useful to see what kind of impact this has on riders' motivations and habits.

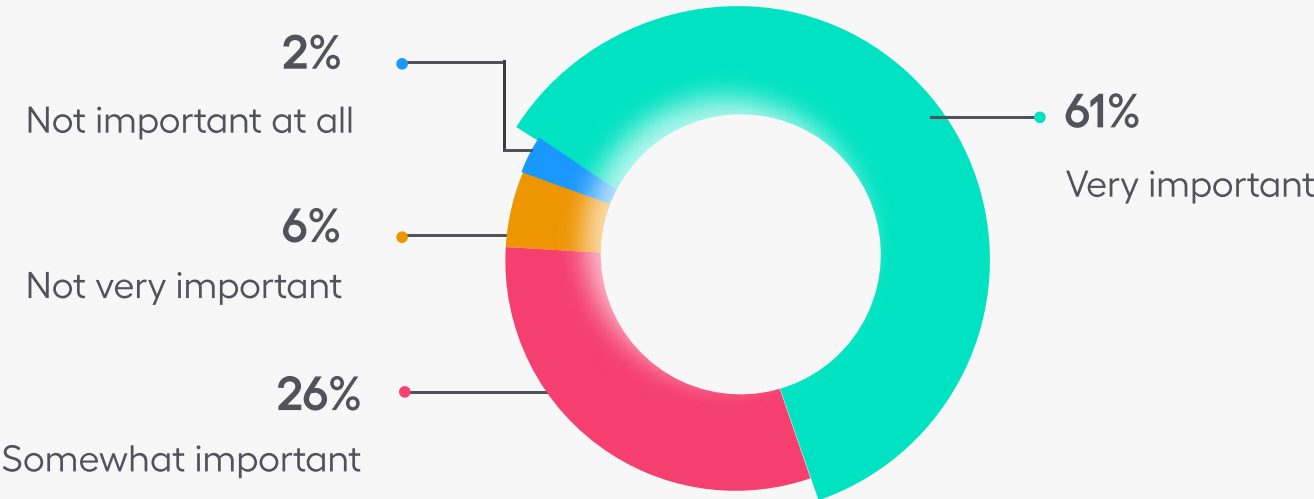


36% of riders said cost stops them from using Beryl more often ↗ 7% from 2022.

30% of non-riders said that cost is a barrier to them taking their first ride, making it the top barrier. ↗ 3% from 2022.



How important is the hire cost?

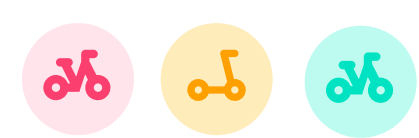


Cost is also much more important to e-scooter riders this year, with 94% of riders citing it as 'somewhat important' or 'very important' when choosing what mode to use.

This shows a considerable increase compared to the 85% that did in 2022.

Multimodal sustainable transport schemes

Beryl operates two award-winning ‘multimodal’ schemes - one in Bournemouth, Christchurch and Poole (BCP) and one in Norwich - where riders can hire all three modes under one app. Multiple mode use is still popular, with 58% of all respondents having ridden more than one mode, exactly the same as in 2022.



Offering riders a choice of vehicles is effective at getting them out of cars.

41%

of riders that have ridden bikes, e-bikes and e-scooters use cars less often or have completely stopped since using Beryl.

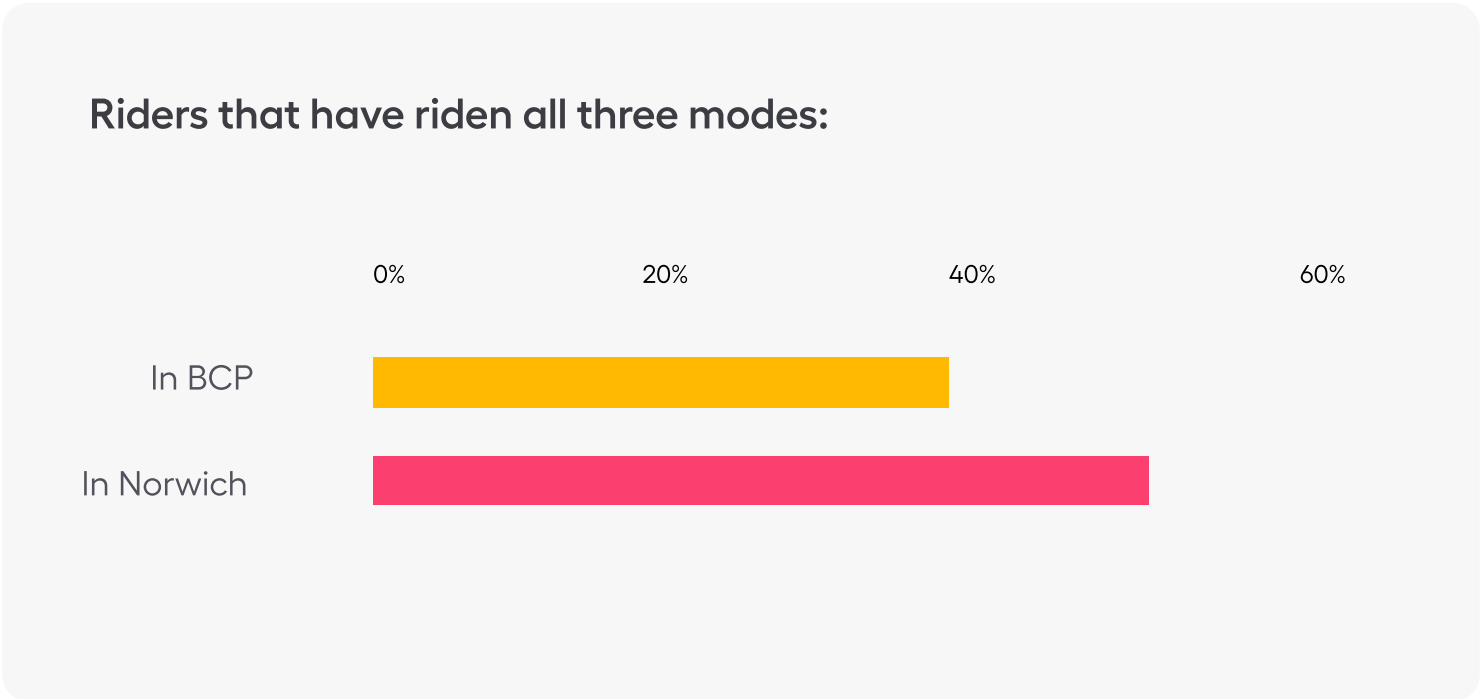
34%

of riders that have ridden two modes.

29%

of riders that have ridden one mode use cars less often or have completely stopped.

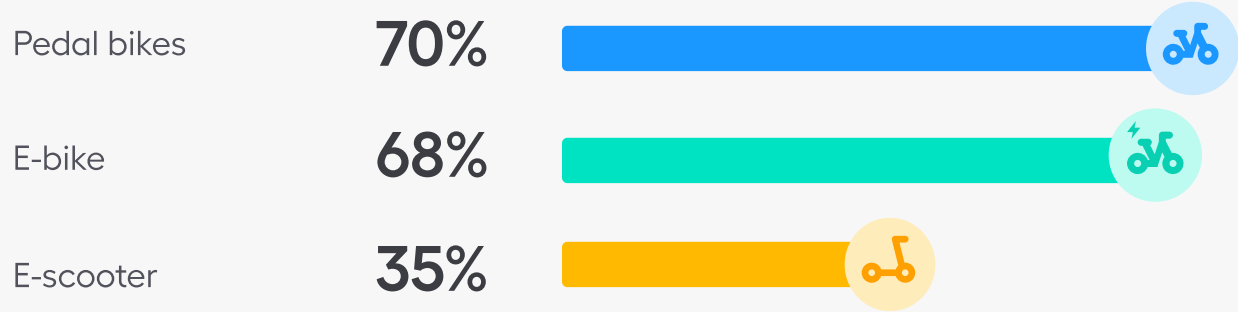
In BCP, 38% have ridden all three, while in Norwich, 51% have ridden all three. Norwich has offered all three modes since September 2020, almost two years longer than BCP has, suggesting that riders are likely to try more modes as schemes mature and become more embedded. In schemes that have both pedal and e-bikes, 58% have ridden both.



Multimodal sustainable transport schemes

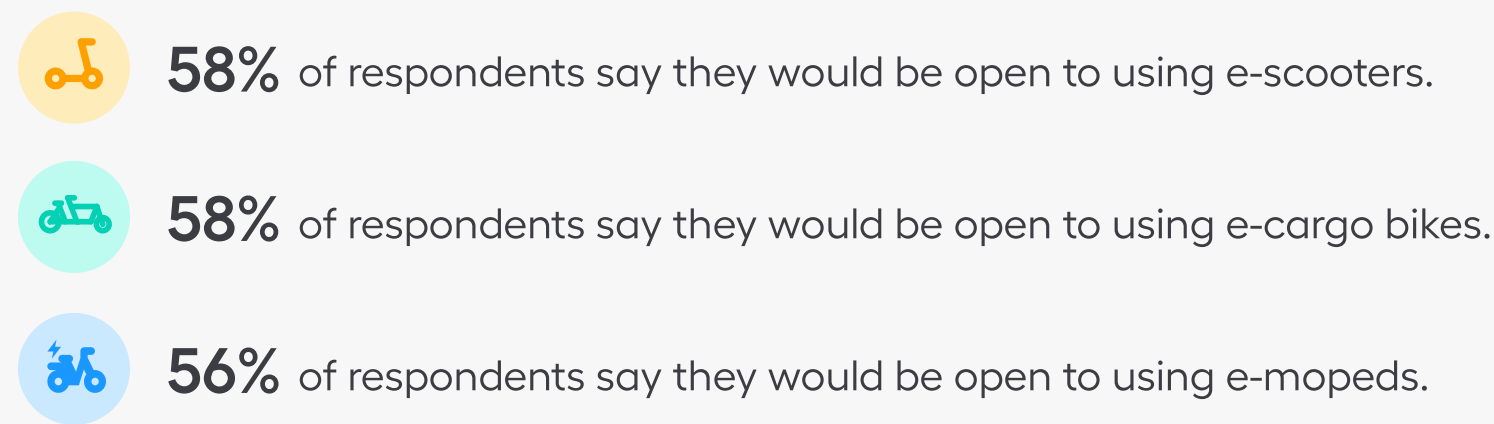
Across all of our schemes, pedal bikes are the mode that the most people have ridden, with 70% of respondents having ridden them at least once. 68% have ridden an e-bike and 35% have ridden an e-scooter.

Modal popularity:



However, across BCP and Norwich, the two areas surveyed where e-scooters are available, 79% of respondents have ridden one. This demonstrates the popularity of e-scooters when available.

Interest in vehicles across schemes that don't currently offer them:

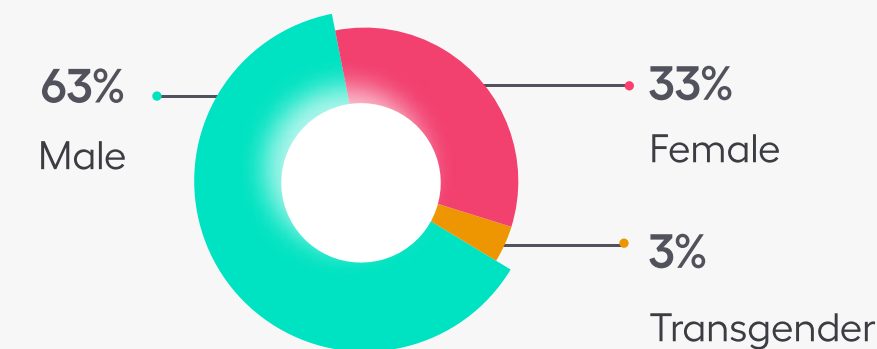


Rider demographics

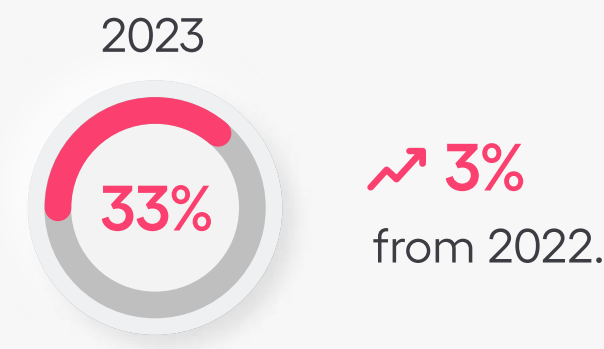
Gender split

There is an encouraging 3% increase in female riders (33%) compared to last year, which brings us in line with the national average for bike share according to the CoMoUK 2022 survey data (2023 data to be published in 2024). This data differs slightly for non-riders, with 60% of respondents male, 36% female and 4% transgender, non-binary or other. This suggests that non-male riders face more barriers to taking their first ride.

Riders gender split:



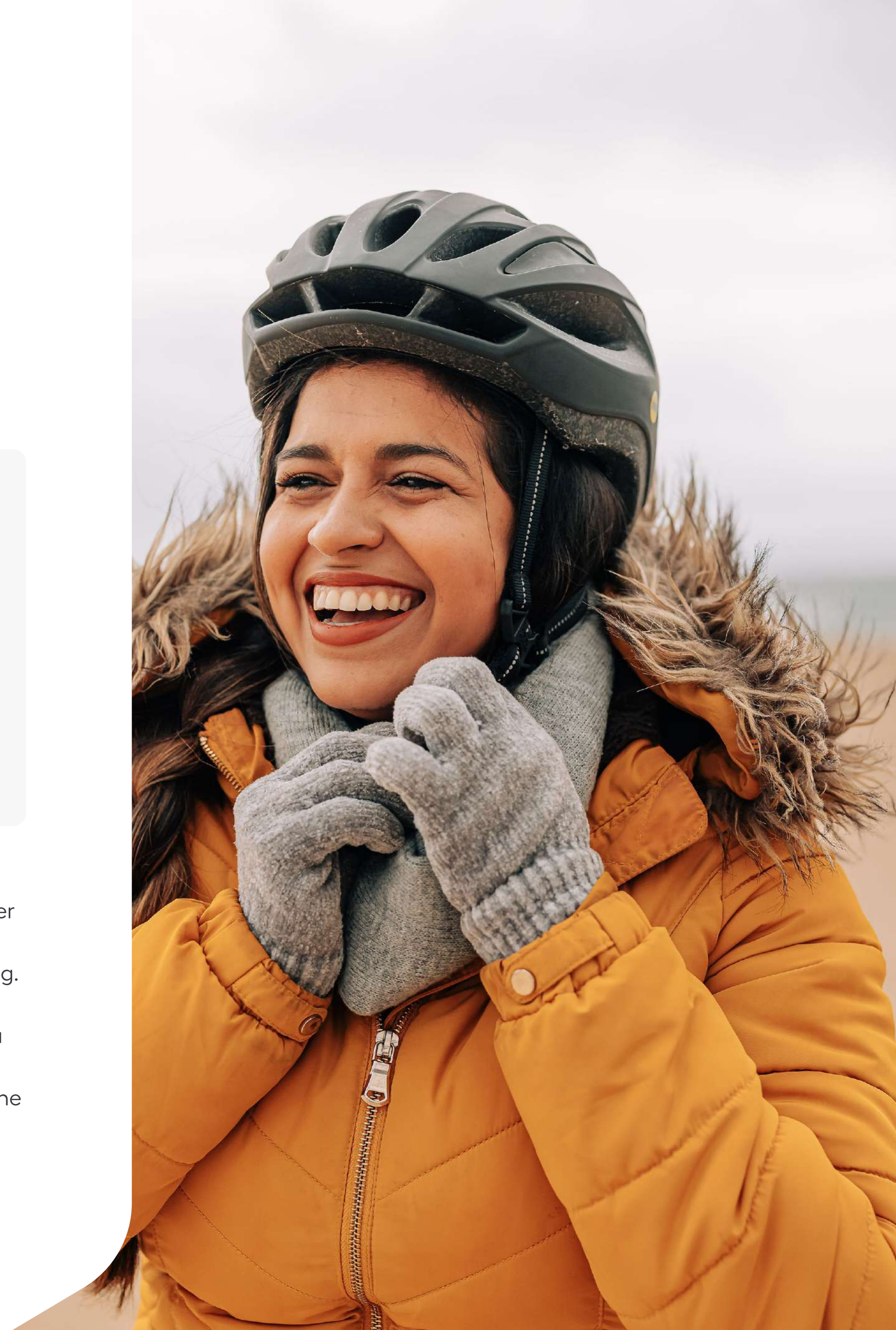
Female riders increase:



Age

The median age of our riders is 35-44, which is the same as 2022. 65% of riders are under 45 years old - a 2% drop compared to 2022. However, of those who have not yet ridden yet, just 57% are aged under 45, suggesting older people also face more barriers to riding.

This year, older users are less likely than younger users to ride after signing up. Almost a quarter (23%) of those that had signed up but not yet taken a ride are in the 45-54 age bracket - making it the most common age range for this behaviour. This is different to the 2022 data, which showed the 25-34 and 35-44 age brackets were the most likely to sign up but not take a ride (both 22%).



Rider demographics

Ethnicity

The ethnicity of our riders is more diverse than last year, where 89.5% of users were White, 4.7% were Asian and 1.8% were Black. While the ethnic breakdown of our respondents broadly reflects that of the populations for our schemes (according to the 2021 census), we still have a slight under-representation of Asian and Black respondents, despite the increases this year.

Employment and income:

59% of our riders are full time employed.

12% of our riders are part-time employed.

9% of our riders are self-employed.

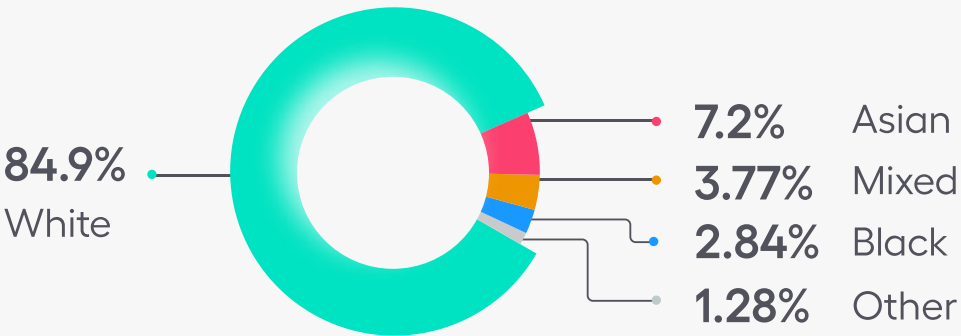
4% are retired (a drop from 5% last year).

7% are students (a drop from 9% last year).

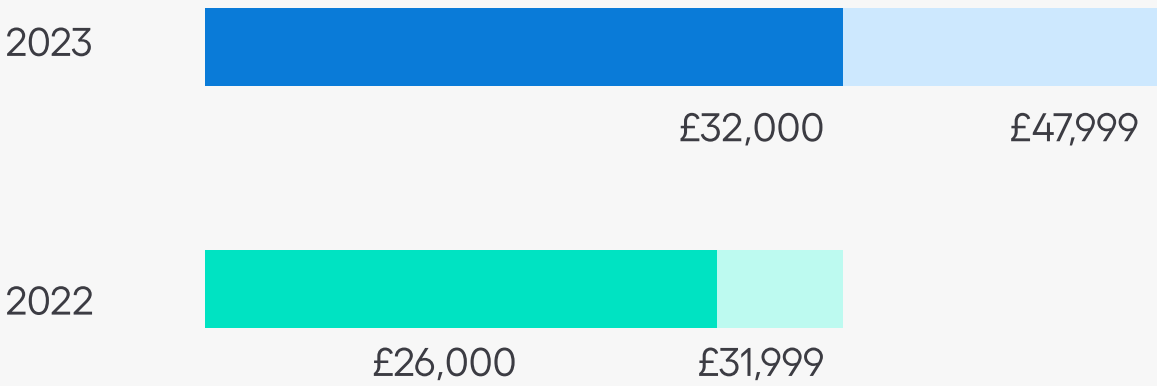
The median household income of our riders is £32,000 - £47,999, which reverts back to 2021 levels after dropping to the £26,000 - £31,999 range in 2022. This could be impacted by the increase in electric vehicle schemes surveyed this year, which cost more to use than pedal bikes.

24% Almost a quarter of our riders are aged between 25 and 34, making it the most popular age range across all schemes.

Ethnicity:



Median household income:



Rider testimonials

23.

Rider quote

My girlfriend had zero interest in cycling when I first met her - she used to get taxis to and from her work in the city. Over time she began to use Beryl bikes for her commute - she slowly became more and more confident when cycling on the roads etc - now she cycles every single day. That is all down to Beryl. I even bought her one of those cute Beryl laser lights for when she is using her own bicycle - as a little tribute to Beryl and what it has given to her.



Beryl is great. Means I can cycle into town in an evening and not worry about bike theft. It's cheaper and better for me and the environment.



I am a university student, and I live not in the city centre. It's 13 mins by bike, so I find it convenient as a replacement for public transport.



I use Beryl to go back and to work. I can enjoy the view, it saves on fuel and I'm very happy with the service and quality of bikes.



Beryl e-scooters have saved me being late to work multiple times. A half hour walk to work is only a nine minute scooter ride.



I love the flexibility. One way trips are the best! You don't have to worry about carrying a lock and having to plan for where you're going to park. I live in a city where it often takes 30 mins via car to get from one side of the river to the other (a mile). I can Beryl in 5!





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