

Some Issues Arising from the TfL/ClearZones London Cycle Hire Scheme Feasibility Study

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[This note is based on a reading of the final study report dated November 2008.]

There are two main issues:

1. The demand analysis is weakened by some very unconvincing statistics. This is important because it is the basis for the conclusion that "There appears to be a substantial market for a Central London cycle hire scheme with around 55,000 potential daily trips by cycle hire...". If our criticisms of the statistics (see below) are correct, the demand within the Zone 1 travelcard area proposed for the scheme could turn out to be much lower (perhaps as small as 20,000 potential daily trips). We believe a larger zone should be chosen to ensure success.

2. The significance of the information technology used in Paris, Barcelona and all the other French schemes is not adequately discussed. This leads the study's authors to the conclusion that "There is a wide range of compatible scheme types, management systems and technologies from which to choose". With the proposed short timescale to implementation we think it would be folly to go for any unproven hardware or software technology and only the JC Decaux (Paris and other French cities) and ClearChannel (Barcelona) schemes are proven on anything like the required scale.

Point 2 stands by itself, but Point 1 requires justification which we give below.

Relevant text from the report

[Para numbers refer to the October draft of the study report. *Italics* added for emphasis by us.]

para 165:

The main differences between the study in London and the existing scheme in Paris are as follows:

- Smaller deployment area – 40 km² in London compared with 87 km² in Paris
- Lower population within the deployment area – *400,000 in London compared with 6,500,000 in Paris.*
- Lower population density – 12,000 people per km² in Central London compared to 24,000 in Paris.
- Fewer trips are made by inhabitants of the metropolitan area – *815,000 (Zone 1 to Zone 1) in London compared to 6.5 million in Paris.*
- Fewer trips above 1km – *256,000 trips in London compared to 3.25 million in Paris (average weekday).*
- Higher cycling mode share in Central London (increase of 86 per cent since 2000 in London compared to 46 per cent in Paris in the same period up to the introduction of Vélib').

para 123:

Table 1.2.1 Cycle trips made by inhabitants of Greater London (2001)

Number of cycle trips:	Trips	%
<i>Within Central London</i>	<i>5,934</i>	<i>2</i>
<i>Within Inner London</i>	<i>84,430</i>	<i>30</i>
Within Outer London	117,145	41
<i>Between Central and Inner</i>	<i>43,194</i>	<i>15</i>
Between Central and Outer	7,268	3
Between Inner and Outer	20,711	7
Between Greater London and rest of UK	6,483	2

Source: LATS 2001

para 179:

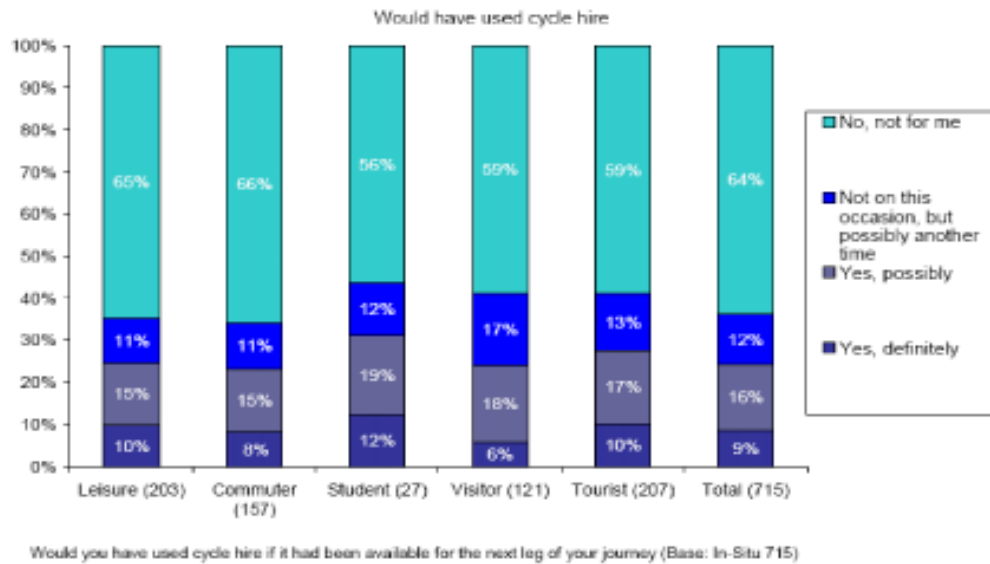
Table 2.4.1 – Uptake predicted by customer research for different user groups who would 'definitely' use the system:

	Leisure	Commuter	Student	UK Visitor	Overseas visitor	Average
% Uptake predicted in customer research	<i>10%</i>	<i>8%</i>	<i>12%</i>	<i>6%</i>	<i>10%</i>	<i>9%</i>

para 178:

The market research involved two complementary surveys: 720 face-to-face interviews conducted "in-situ" (on-street or at-station in Central London) and 2,009 on-line / web surveys. The research was carried out in December 2007. Figure 2.4.1 and table 2.4.1 show the potential uptake of trips as predicted by the market research.

Figure 2.4.1 Market research results



para 180:

The uptake is fairly consistent across all the different user groups. *The average percentage uptake, nine per cent, is significantly higher than the observed uptake in Paris of approximately three per cent.*

paras 181-2:

The reason for a higher uptake in London could be explained by the following factors:

- The cost and level of congestion on the public transport network is higher in London than in Paris and hence a mode shift to bike might be a more attractive option. A weekly Travelcard in London costs approximately 50 per cent more than in Paris
- From the recent increase of levels of cycling in London it could be said that Londoners have a better disposition to cycling than Parisians
- The age profile for the comparable metropolitan populations of Ile de France and Greater London shows that 50 per cent of the population of Greater London, compared to 45 per cent of the population of Ile de France is between 15 and 44 years old – the age group most likely to cycle

Although there is a natural tendency to be affirmative in stated preference surveys, only those respondents that said they would “definitely” use the system were included in the uptake figures. Also the study was conducted during the winter months, so figures are considered to be realistic. The following figure (2.4.2) shows the mode of transport which the cycle hire journey would have replaced in both the in-situ and web survey. Both surveys show that the majority of the mode shift would be likely to come from bus and the underground. The vast majority of the ‘none of these’ responses are referring to trips which are currently walked.

Discussion

Our *emphasis* in the paras quoted makes the point. On the basis of a small survey on a hypothetical question, it is stated that the uptake will exceed the Paris uptake by a multiple of 3. Some arguments are advanced (in paras 181-2) as to why this might be the case, but they are not of sufficient weight to make the case.

If the actual take-up proves to be similar to the Paris figure of 3%, then the number of potential cycle hire trips reduces to a level at which the scheme is likely to be considered a failure.

Remedies

There appear to be only two possible steps to mitigate the risk predicted above:

1. Go all-out to provide for the 'after rail' market, which the report seeks to exclude, by positioning several hire stations near mainline stations. But as the study points out, this would only add an extra two daily journeys per hire bike and would position many of the bikes at inconvenient points for other users, so this is probably not an attractive solution.
2. Enlarge the area covered so as to include areas with a more substantial residential population. The differences in demographics between the London and Paris areas studied are immense (see para 165). It seems intuitively unlikely that an area with so few residents will generate the required number of hire cycle journeys. Travelcard Zone 2 or a substantial part of it seem much more likely to support a successful deployment.