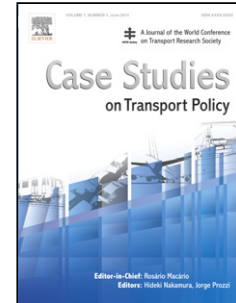


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Author: Craig Morton



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# Appraising the Market for Bicycle Sharing Schemes: Perceived service quality, satisfaction, and behavioural intention in London

## Author

Craig Morton <sup>A\*</sup>

<sup>A</sup> Institute for Transport Studies, University of Leeds, 34-40 University Road, Leeds, LS2 9JT, United Kingdom

\*: correspondence author

## Highlights

- A market segmentation of the London bicycle sharing scheme identifies 4 distinct groups of members
- Each segment is defined according to their perceived quality of service, level of satisfaction, behavioural intention, and demographics
- The segment profiles are used to inform sub-market strategies to retain existing members and attract new members

## 1. Introduction

The rate of global urbanisation is expanding rapidly as an increasing proportion of the population is born in or moves to cities. As a result of this, more attention is being paid to the design, operation, and management of urban transport systems in an effort to address the existing issues that the system faces (Banister, 2005; Goldman and Gorham, 2006). These issues include low levels of air quality, high levels of road congestion, and high levels of traffic noise, which mostly stem from the use of private motorised vehicles to service mobility needs.

Urban governments are in the process of developing strategies that aim to rebalance the transport system by diminishing the benefits of private motorised vehicles, restructuring urban forms to reduce car reliance, and enhancing the performance of public and active transport modes. One such strategy which has advanced rapidly since the millennium is the installation of bicycle sharing schemes (Fishman et al. 2013; Parkes et al. 2013), which have taken hold in cities with varying environmental and economic conditions. Such schemes provide flexible access to bicycles, with users generally being able to collect and return bicycles at stations located throughout the city for a set fee. These schemes respond to a number of prominent societal objectives including promoting a shift to active travel in urban environments, improving the health and wellbeing of citizens, and enhancing the urban realm by making cities more attractive places to live and do business. As such, the continued founding of new schemes and the expansion of existing schemes is viewed as an important element of local transport policy. These objectives are in turn reliant on a detailed understanding of the consumer structure in this burgeoning market so that schemes can be tailored to best meet user needs and expectations.

To date, research on bicycle sharing schemes has focused on issues such as the factors that underpin user adoption (Shaheen et al. 2011; Fishman et al. 2015; Nikitas et al. 2016; Kim et al. 2017; Chardon

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