

Capital Bikeshare

2014 Customer Survey

Highlights of Results



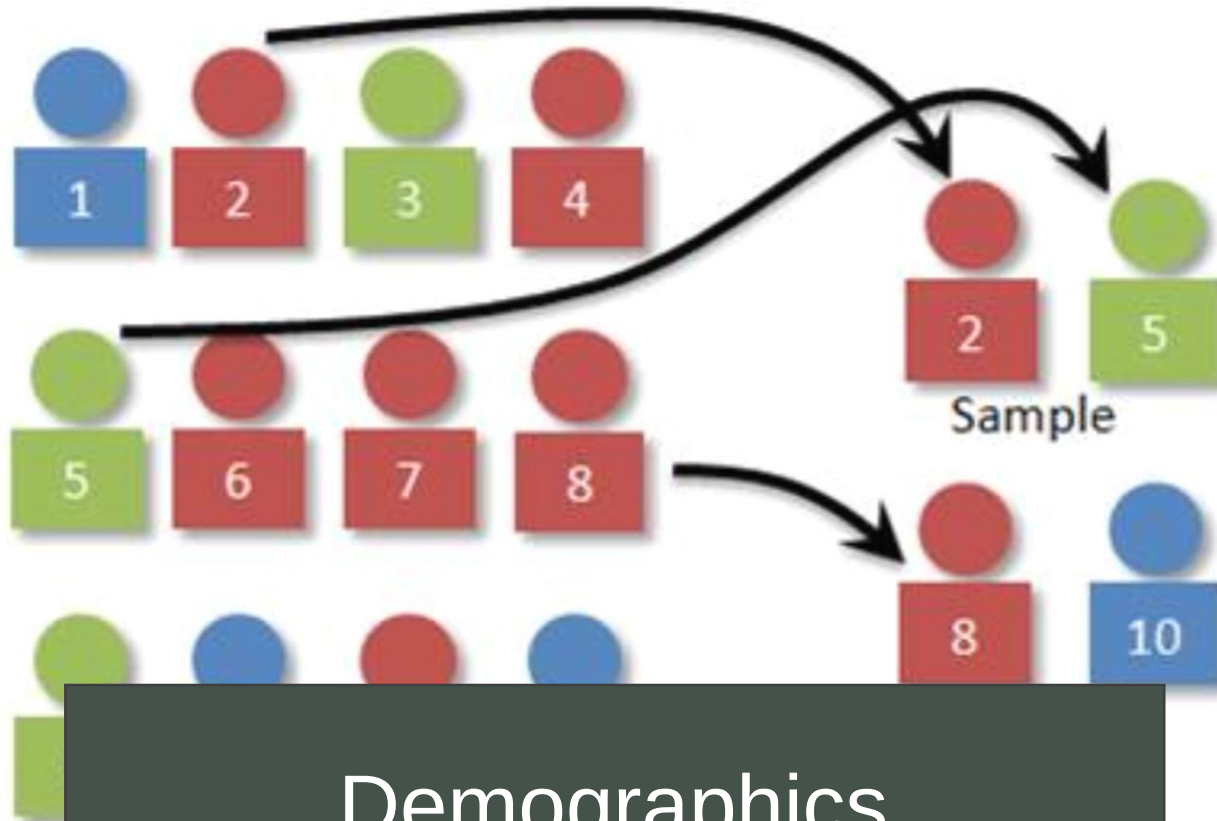
February 25, 2015
Lori Diggins
LDA Consulting



Survey Overview

- Purpose of survey – Examine:
 - Characteristics of CB members
 - Characteristics of bikeshare trips
 - Travel changes in response to bikeshare
 - Auto ownership / use changes with bikeshare
- Online survey method:
 - CB staff sent email invitation to 27,600 registered members
 - Total sample of 4,314 (16% response rate)





Demographics



Demographic Key Findings

Compared to all commuters in the Washington metro region, CB members are:

- Considerably younger
- More likely to be male
- More likely to be White
- Slightly less affluent
- Much more likely to live in urban core

The Majority of Members Lived in DC; Work Locations were Similar to Home Locations

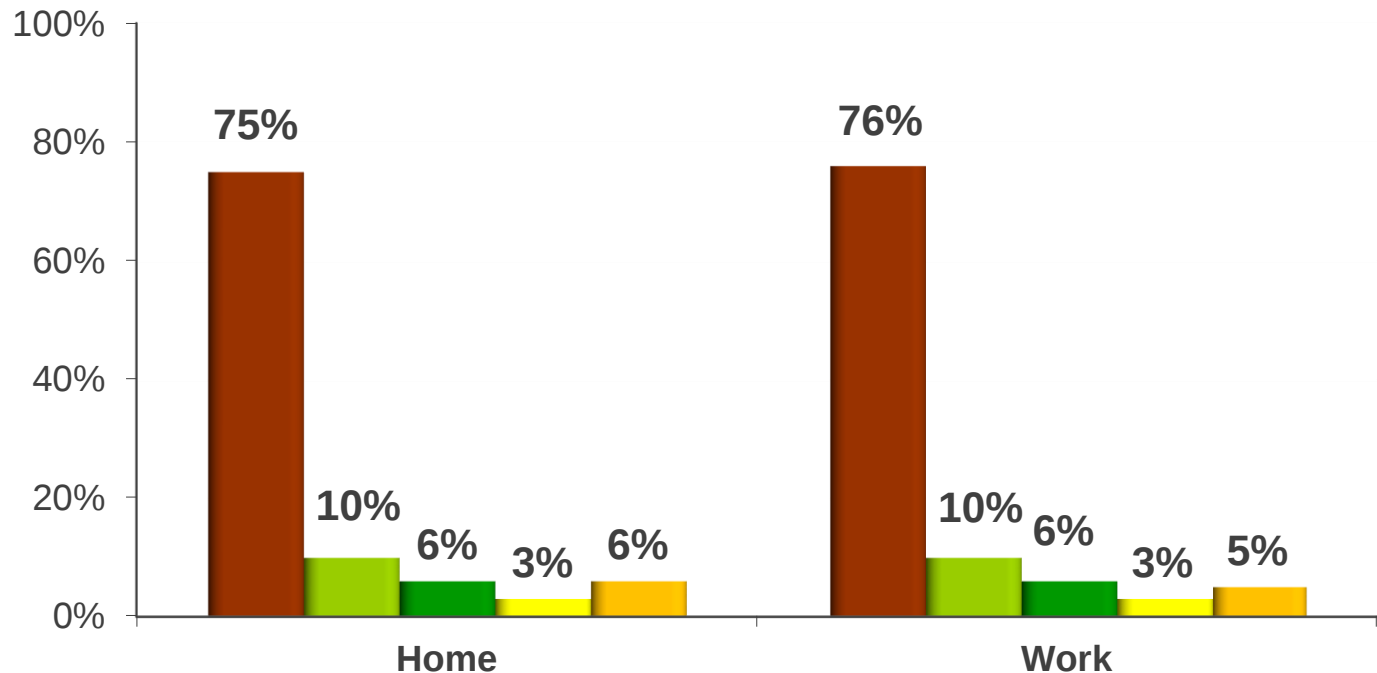
But DC share has declined since 2011

2011-2014

Change

**Home -
DC share
declined
from 83% to
75%**

**Work –
DC share
declined
from 80% to
76%**



■ District of Columbia ■ Arlington Co ■ Montgomery Co ■ Fairfax Co ■ Other

2014 Survey

Home location
n = 3,600

Work
location
n = 3,395

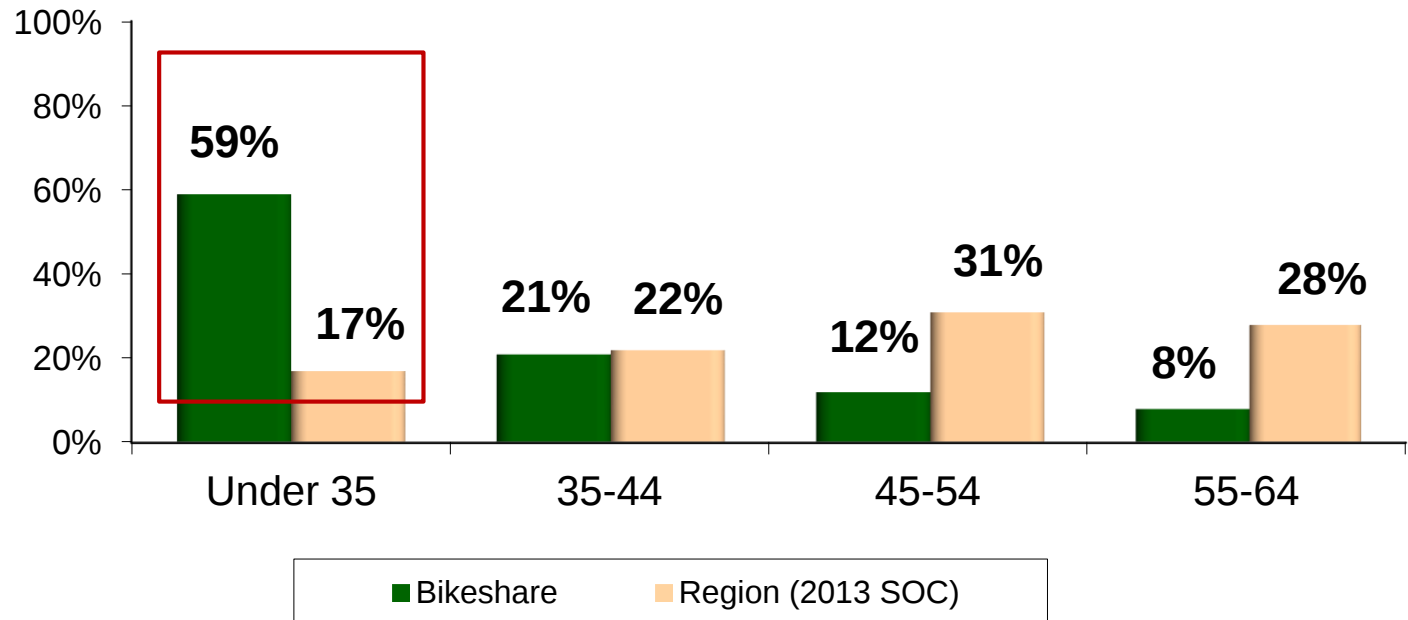
Q33a What is your Zip code at work?
Q49 What is your home Zip code?

CB Members were Considerably Younger than All Regional Commuters

59% of Bikeshare members were under 35, compared with 17% of all regional commuters

Slight increase in age from 2011 to 2014

20% of 2014 members were 45 or older, compared with 14% of members in 2011



2014 CB Survey
n = 54,005

2013 SOC
Survey
n = 6,334

Q52 What is your age?

CB Members' Gender and Race/Ethnicity Distributions

Also Differed from those of Regional Commuters

	<u>2014 CB</u>	<u>2013 SOC</u>
<u>Gender</u>		
■ Male	59%	45%
■ Female	41%	56%
<u>Race/Ethnicity</u>		
■ White	84%	50%
■ Asian	5%	10%
■ Hispanic / Latino	5%	13%
■ African-American	3%	25%

2014 Survey

Gender
CB n = 4,041
SOC n = 6,334

Race/Ethnicity
CB n = 3,743
SOC n = 6,334

Q51 Are you male or female?

Q56 Which of the following best describes your racial or ethnic background?

Membership Profile Continued to Change – Less Young and Less DC-Centered; But More White, Affluent, and Male

<u>Demographics</u>	CB Survey			
	<u>2011</u>	<u>2012</u>	<u>2014</u>	
■ 45 or older	14%	17%	20%	(+6%)
■ Live outside DC	17%	22%	25%	(+8%)
■ Income over \$100K	39%	45%	50%	(+11%)
■ Male	55%	57%	59%	(+4%)
■ White	81%	80%	84%	(+4%)

2011 CB Survey
n = 5,464

2012 CB Survey
n = 3,731

2014 CB Survey
n = 4,313

57% of Members Had a Personal Vehicle Available in 2014, a Slight Increase from 2011

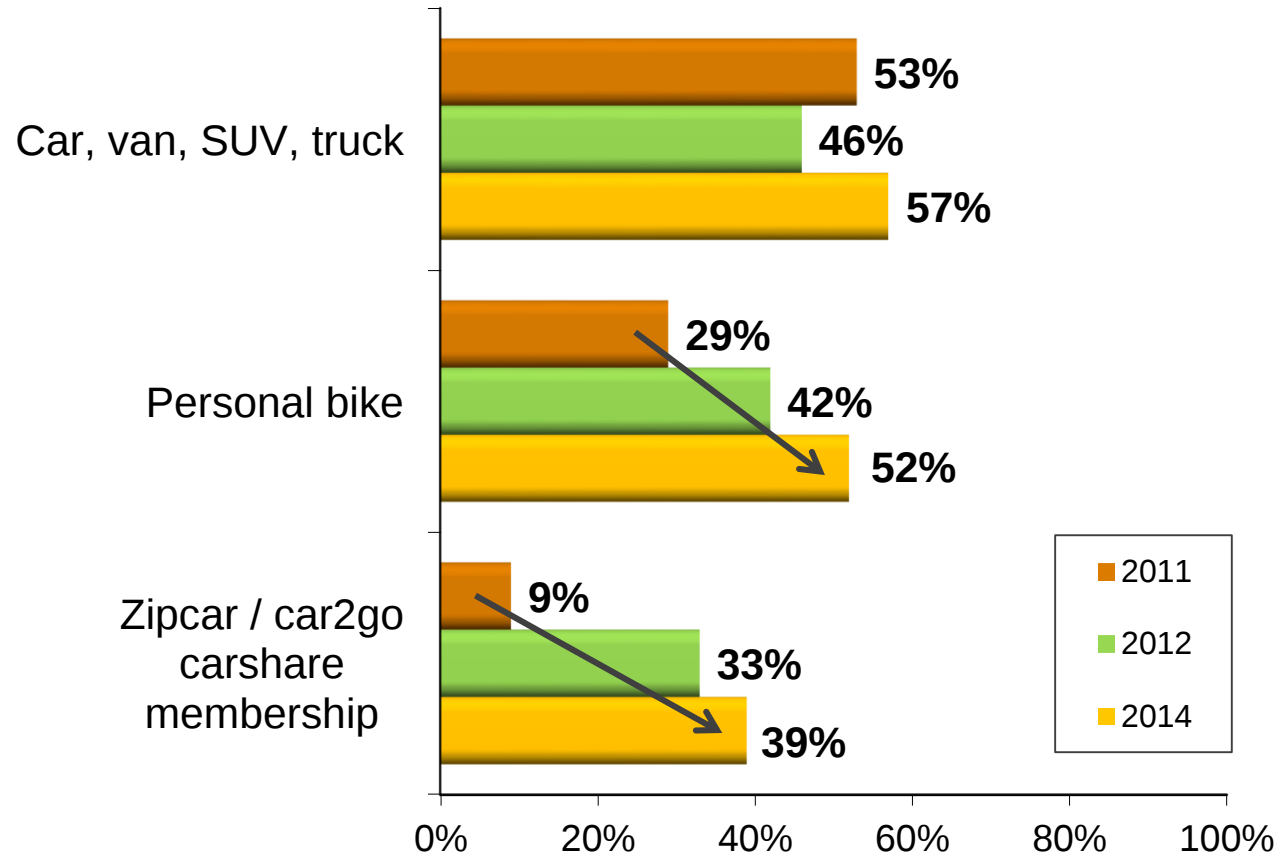
Availability of personal bike has increased substantially

Vehicle availability was greatest for members who:
Lived outside DC and were older, male, more affluent

2011 CB Survey
n = 5,464

2012 CB Survey
n = 3,731

2014 CB Survey
n = 4,313



Q25 Do you have any of the following vehicles available to you on a regular basis for your travel?

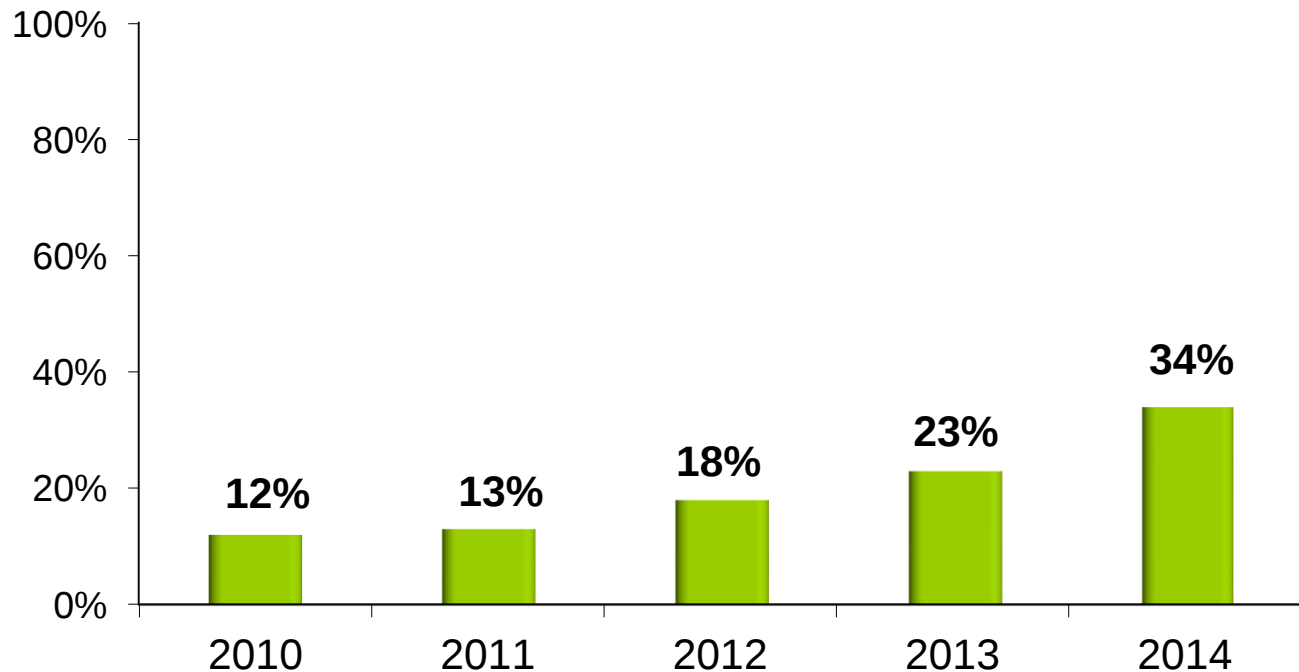
CB Information and Motivation



Joan N. Mas 2/2007

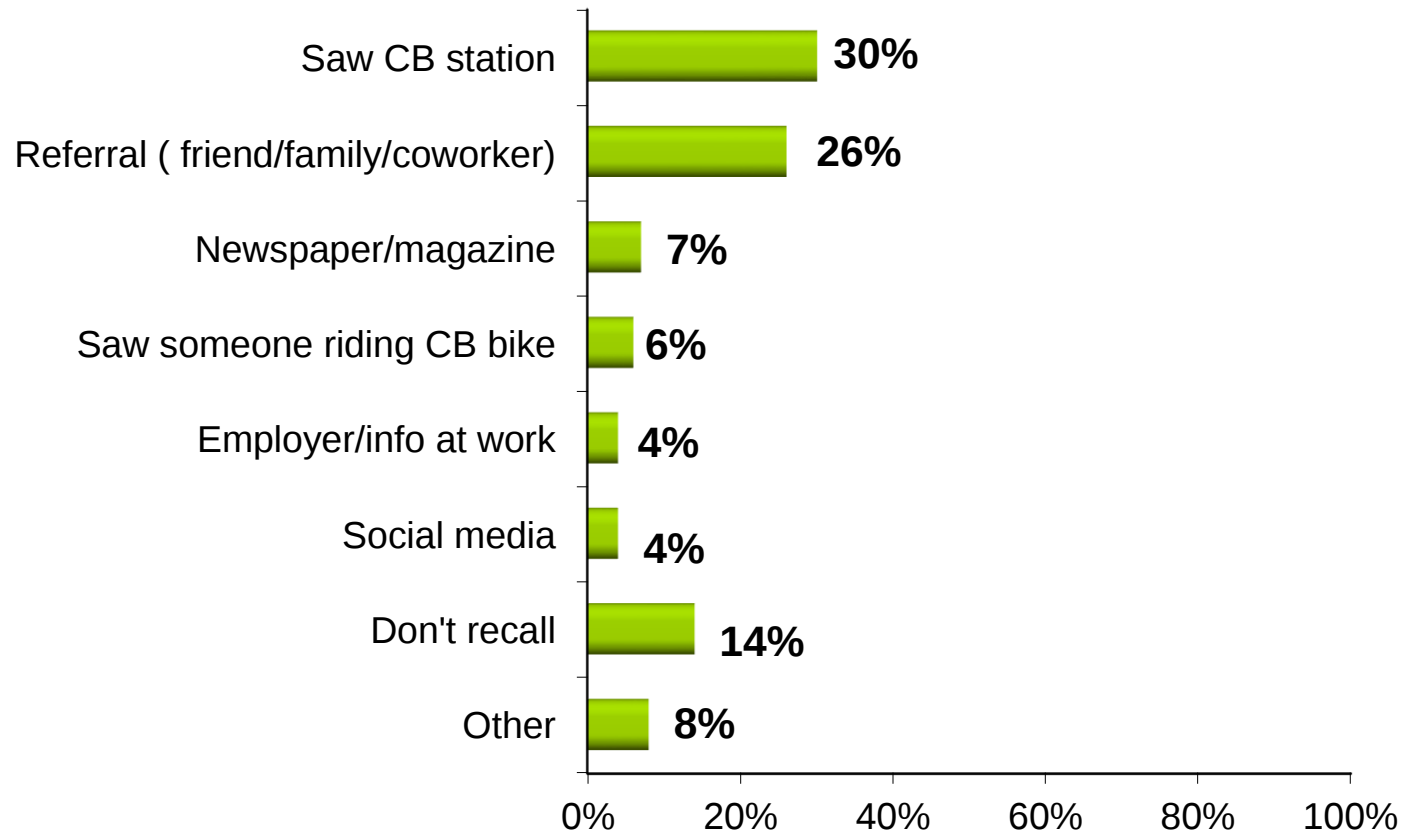
Membership Growth has been Generally Steady Since the August 2010 Start,

But many members have re-registered -
43% first joined CB between 2010 and 2012

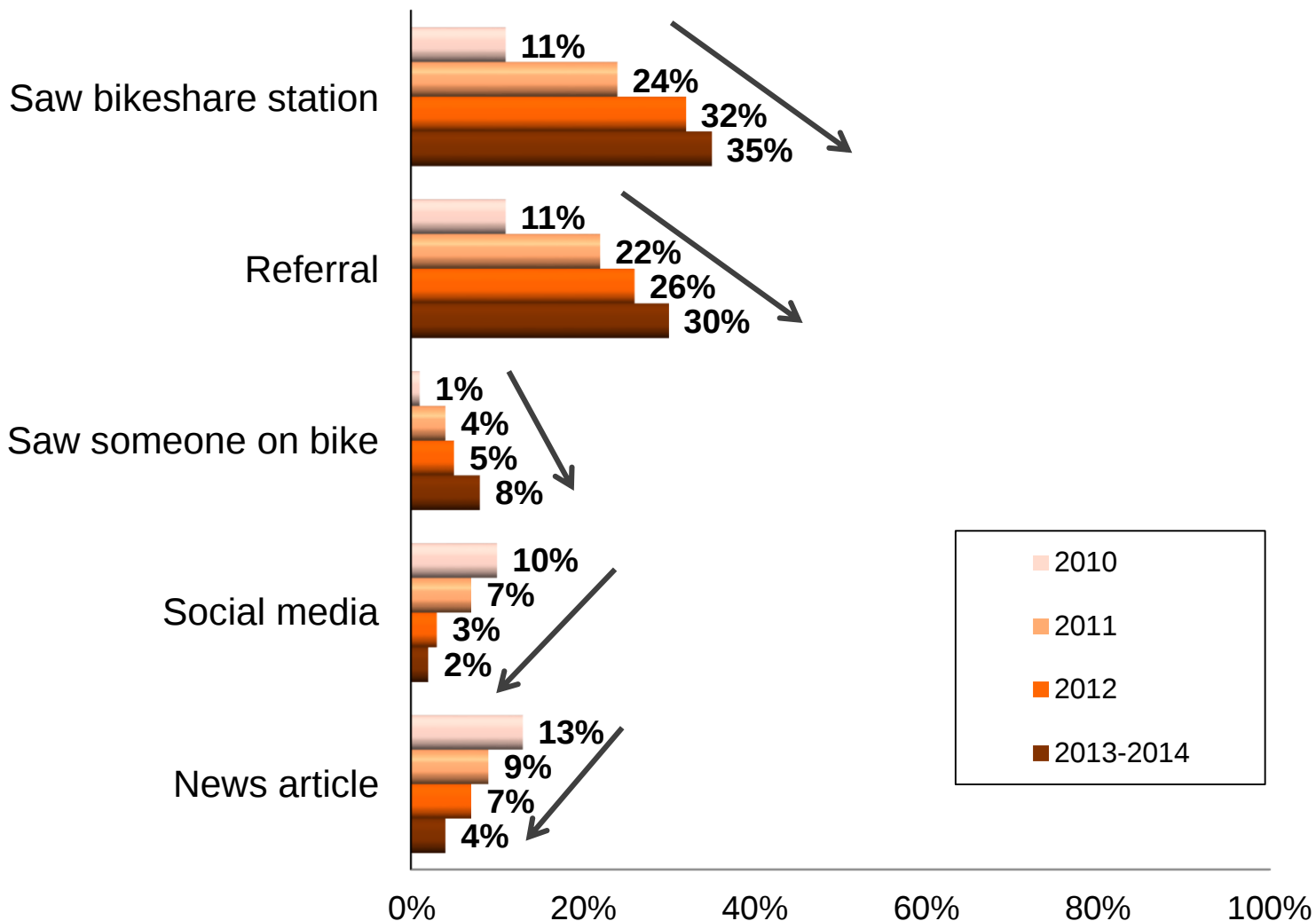


CB's visibility is a significant marketing tool – 30% of members learned about CB by seeing a CB station

Referral were noted by 26% of members



CB Visibility and Referrals Increased as Info Sources; Social Media and Print Media Declined Since 2010



2014 Survey
Members joined
in:

2010
n = 540

2011
n = 551

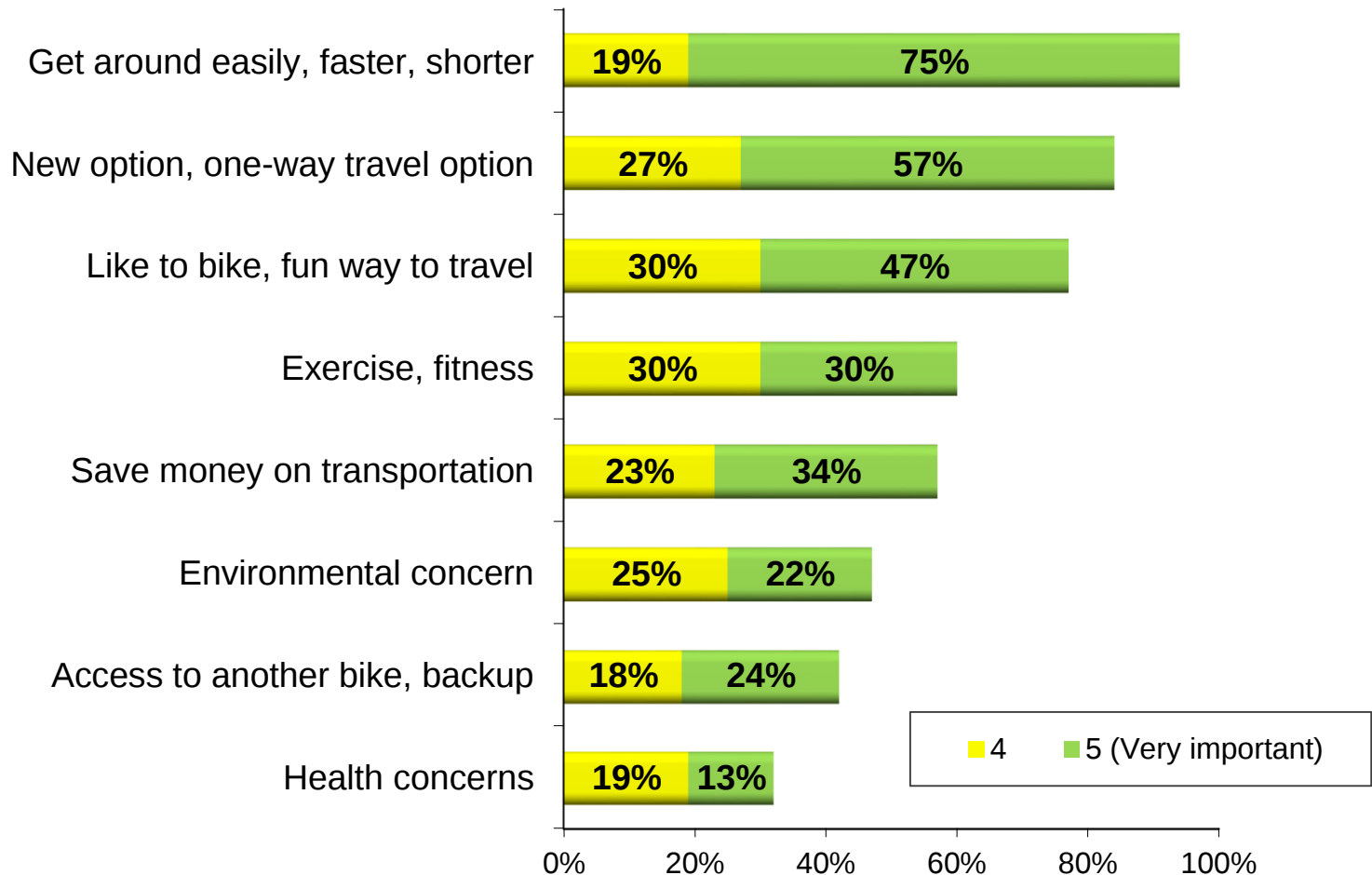
2012
n = 765

2013-2014
n = 2,440

Q1 How did you first learn about Capital Bikeshare? By Q6 When did you join Capital Bikeshare?

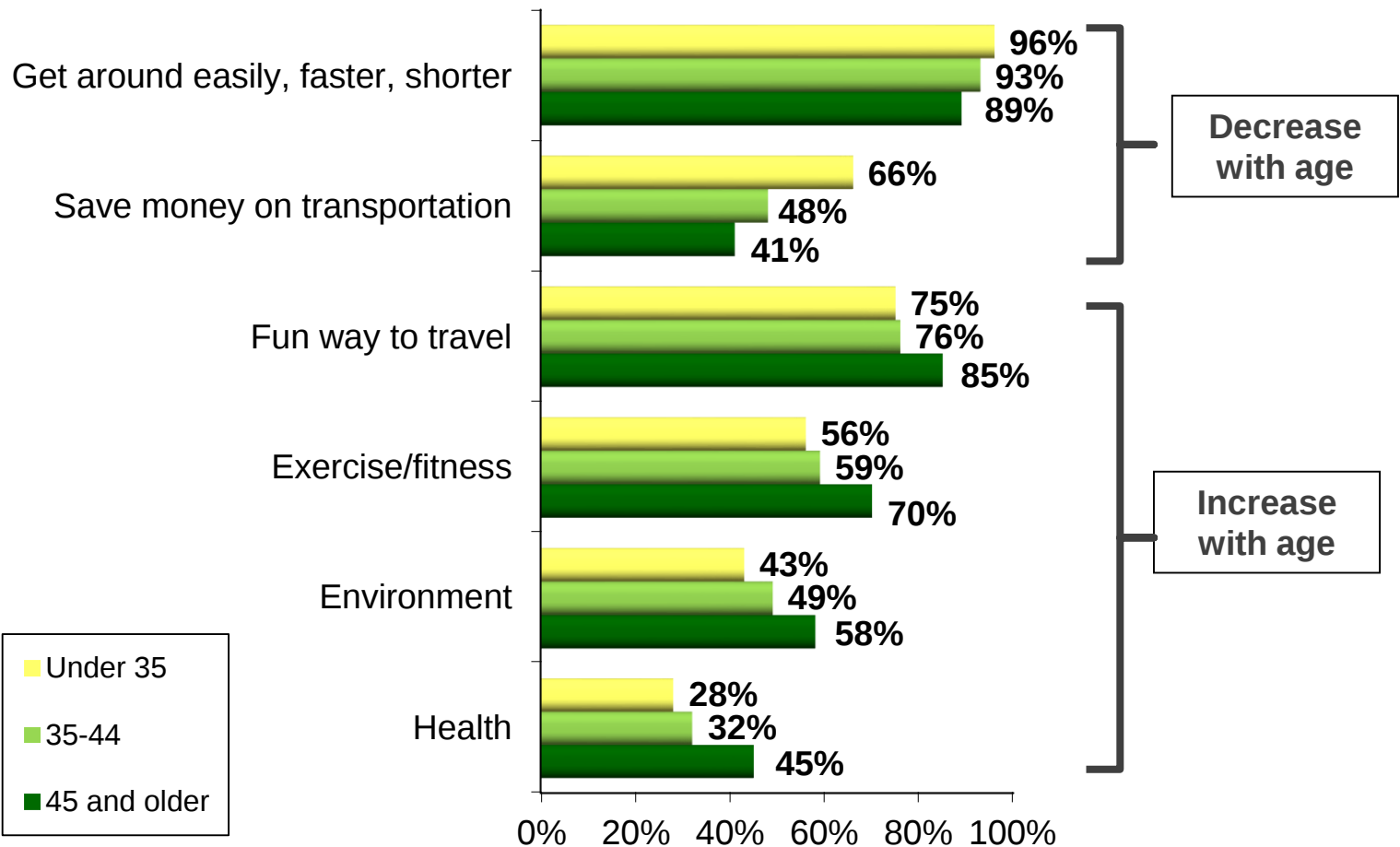
Easier/Faster Travel, New/One-way Option, and Like to Bike were Primary Reasons to Join CB; Other reasons – fitness, save money, and environment

Both order and magnitude of reasons were essentially the same in 2014 as in 2012



Q7 What motivated you to join Capital Bikeshare? Rate each reason on 1-5 scale, where 1 means not at all important and 5 means very important.

Younger Members were Motivated by Ease of Getting Around and Saving Money; Older Members by Exercise, Environment, Health



2014 Survey

Under 35 years
n = 2,331

35 – 44
n = 804

45 and older
n = 803

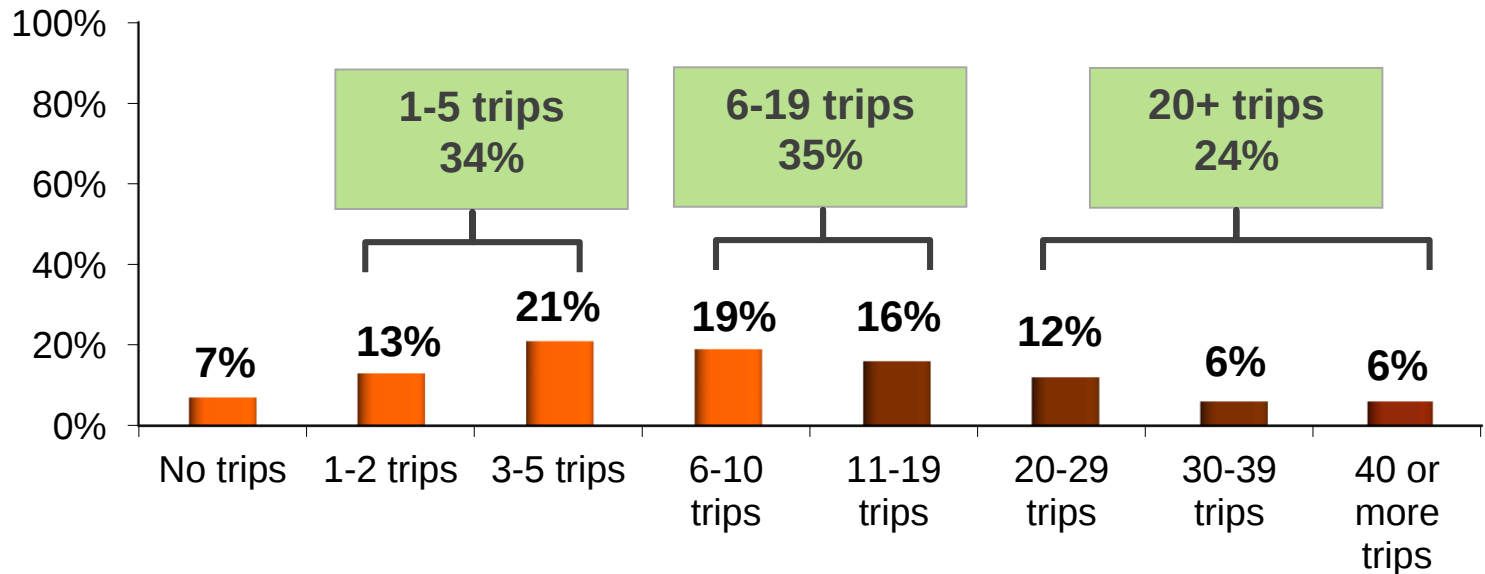
Q7 What motivated you to join Capital Bikeshare? (Percentages giving 4 or 5 (Very important) rating)
Q52 What is your age?

Typical Bikeshare Use



Use Was Well Distributed Across Trip Frequency Categories – Demand Exists for Use at Many Levels

Members made an average of 13.0 CB trips last month;
34% made 1 to 5 trips; 24% made 20 or more trips



Who Rode CB Frequently?

Members made 6 or more trips in past month ...

All members

59%

Members who ...

vs average

- | | | |
|------------------------------------|-----|------|
| ■ Were <u>under 25 years</u> | 76% | +17% |
| ■ Motivated by <u>saving money</u> | 69% | +10% |
| ■ Had <u>no personal vehicle</u> | 68% | +11% |
| ■ Had <u>no personal bicycle</u> | 64% | +5% |
| ■ Were <u>male</u> | 65% | +6% |
| ■ Joined in 2014 | 64% | +5% |

2014 Survey

All members
n = 4,312

Under 25
n = 316

Save money
n =

No vehicle
n = 2,458

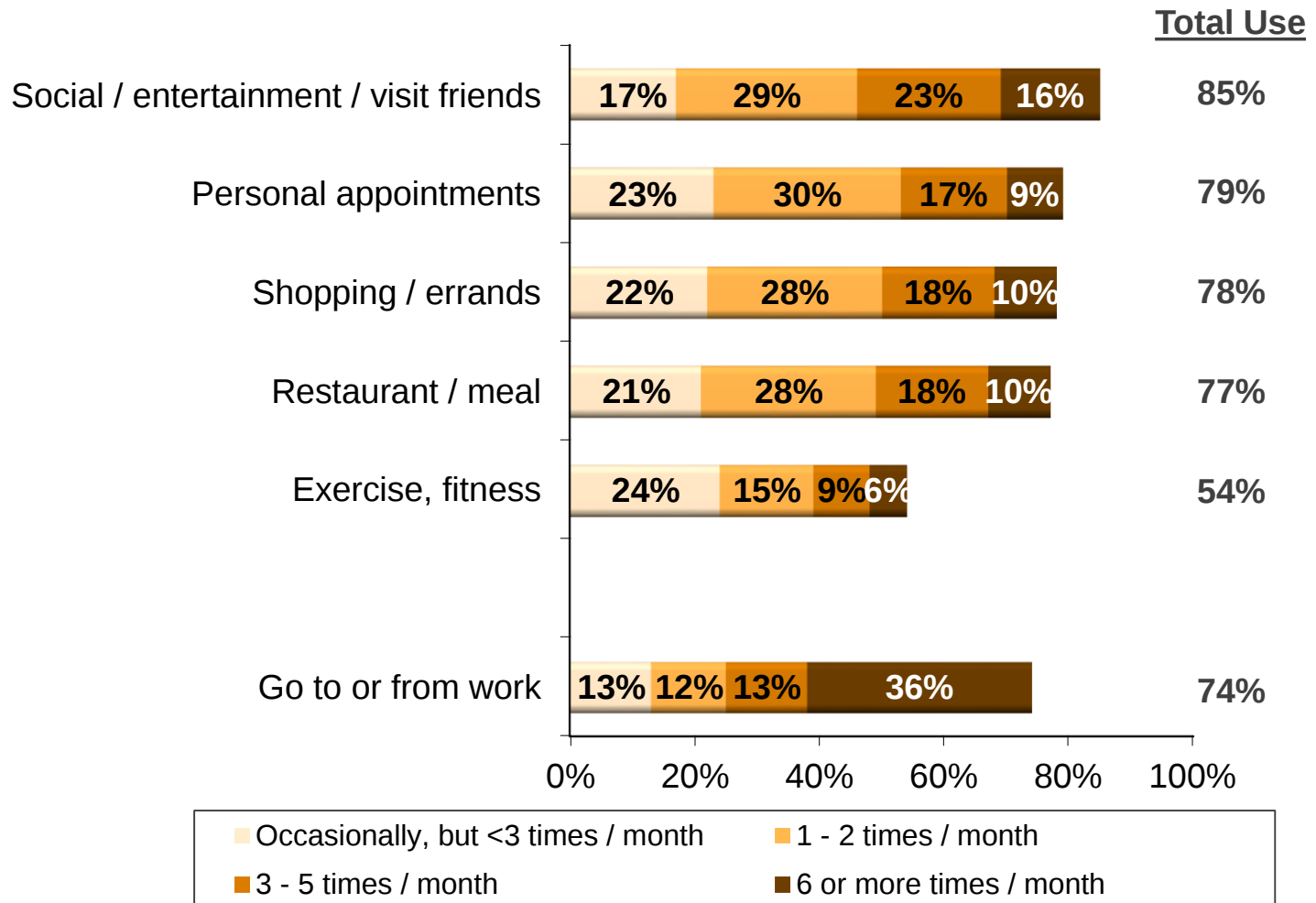
Male
n = 2,338

No personal
bicycle
n = 2,091

Joined recently
Jul – Nov 2012
n = 1,404

Members Used CB Most Often for Non-Work Trips - Social, Errands, Meals were Frequent Uses

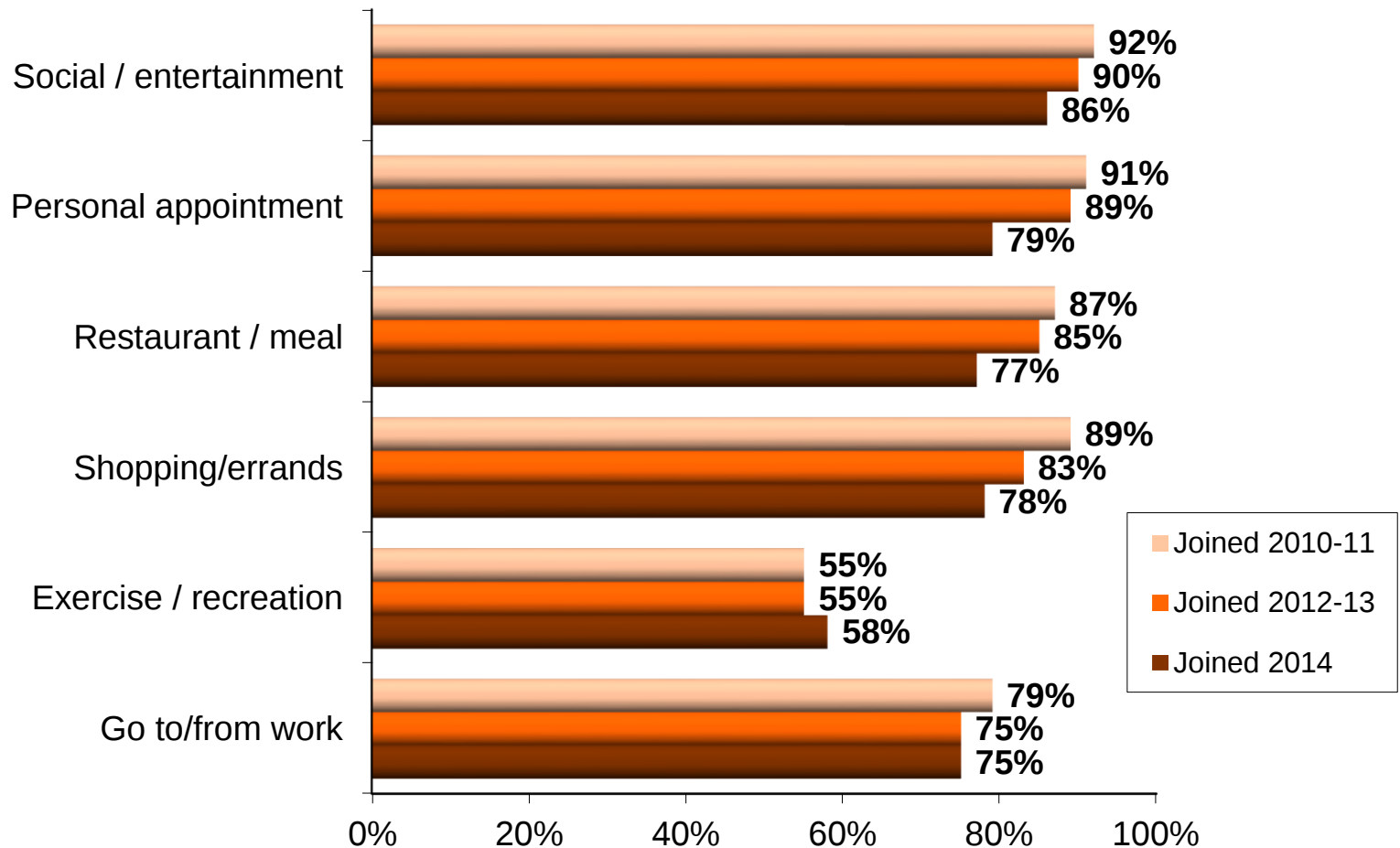
But 74% of members used CB to get to or from work



Long-term Members Used CB for Most Purposes at Higher Rates than Did More Recent Members;

Exercise trips were exceptions

But long-term members' greater use could be due to greater opportunity over time



2014 Survey

Joined CB in:

2010-2011
n = 1,094,

2012-2013
n = 766

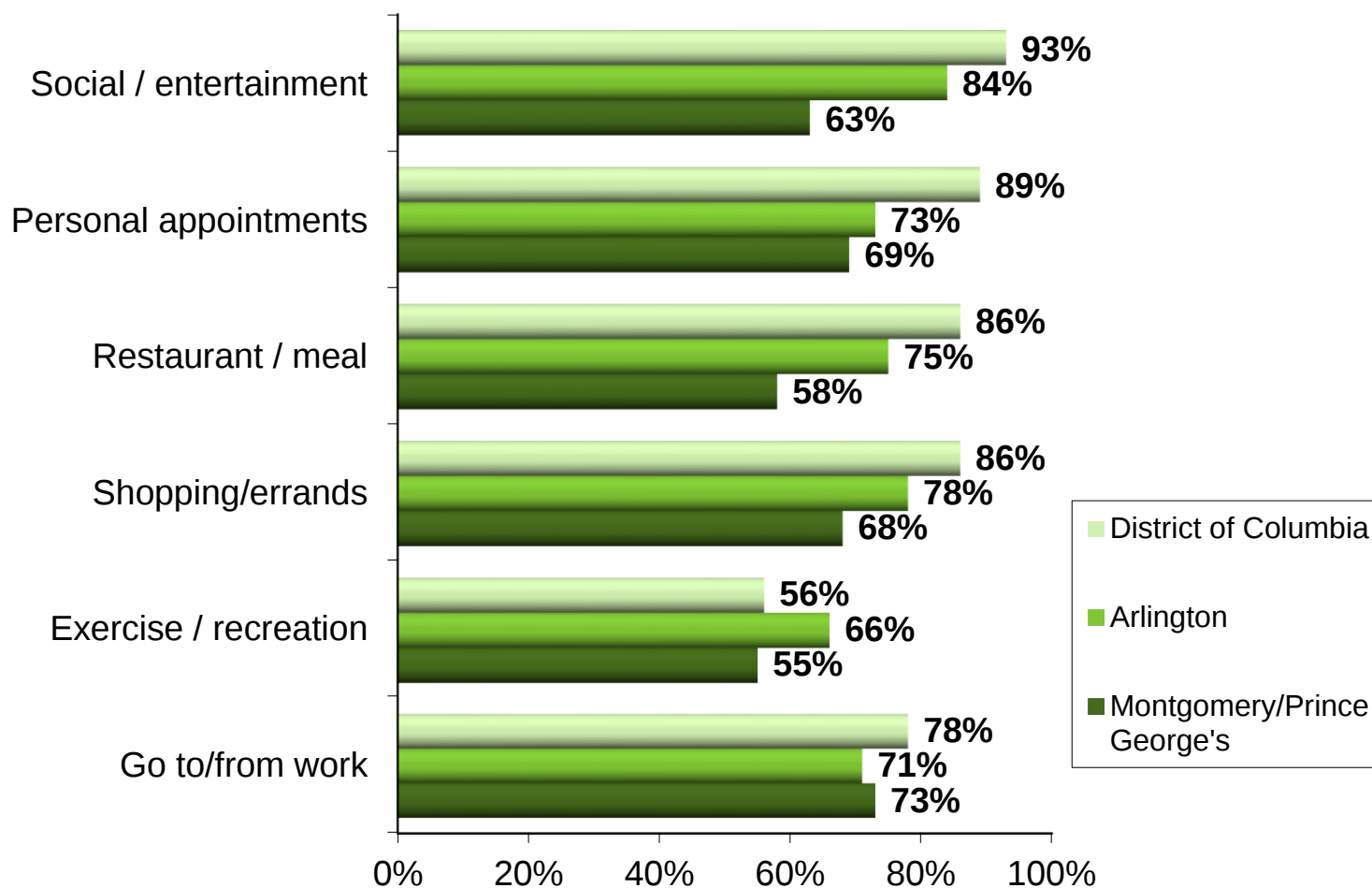
2014 n = 1,474

Q10 How often do you use Capital Bikeshare for each of the following types of trips?

Q6 When did you join Capital Bikeshare?

DC Residents Used CB More Often than did Non-DC Residents for Most Purposes

This was likely related to greater destination opportunities



2014 Survey

District of
Columbia
n = 2,693

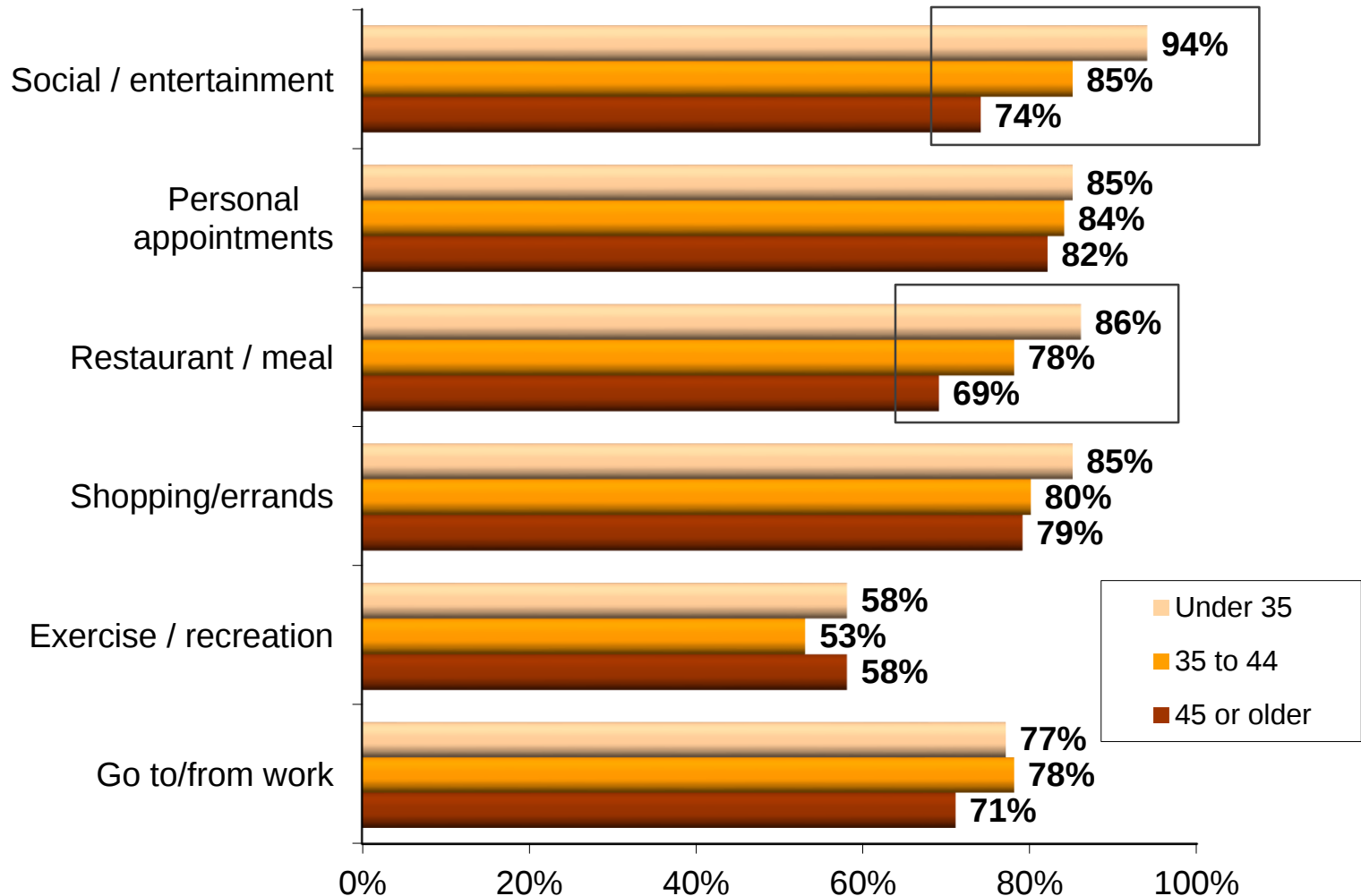
Arlington
n = 361

Montgomery /
Prince George's
n = 251

Note: Data not
shown for other
jurisdictions due
to small sample
sizes

Q10 How often do you use Capital Bikeshare for each of the following types of trips?
Q49 What is your home Zip code?

Young Members Used CB Much More Often than did Older Members for Social and Meal Trips



2014 Survey

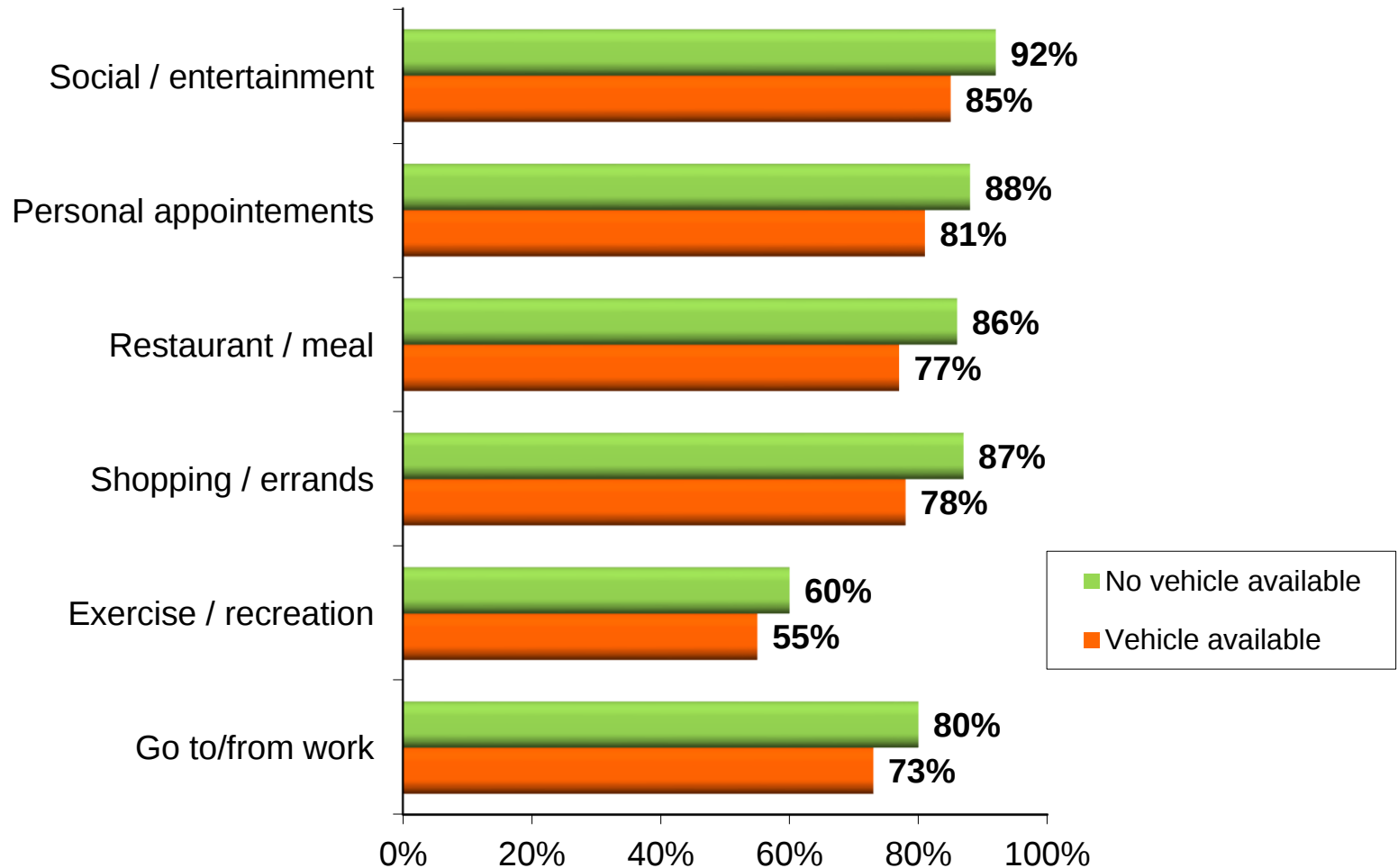
Under 35
years
n = 2,358

35 – 44
n = 821

45 and older
n = 830

Q10 How often do you use Capital Bikeshare for each of the following types of trips?
Q52 What is your age?

Members Without a Personal Vehicle Used CB More for All Trip Purposes did Members who Had Vehicles



2014 Survey

No vehicle
available
n = 1,855

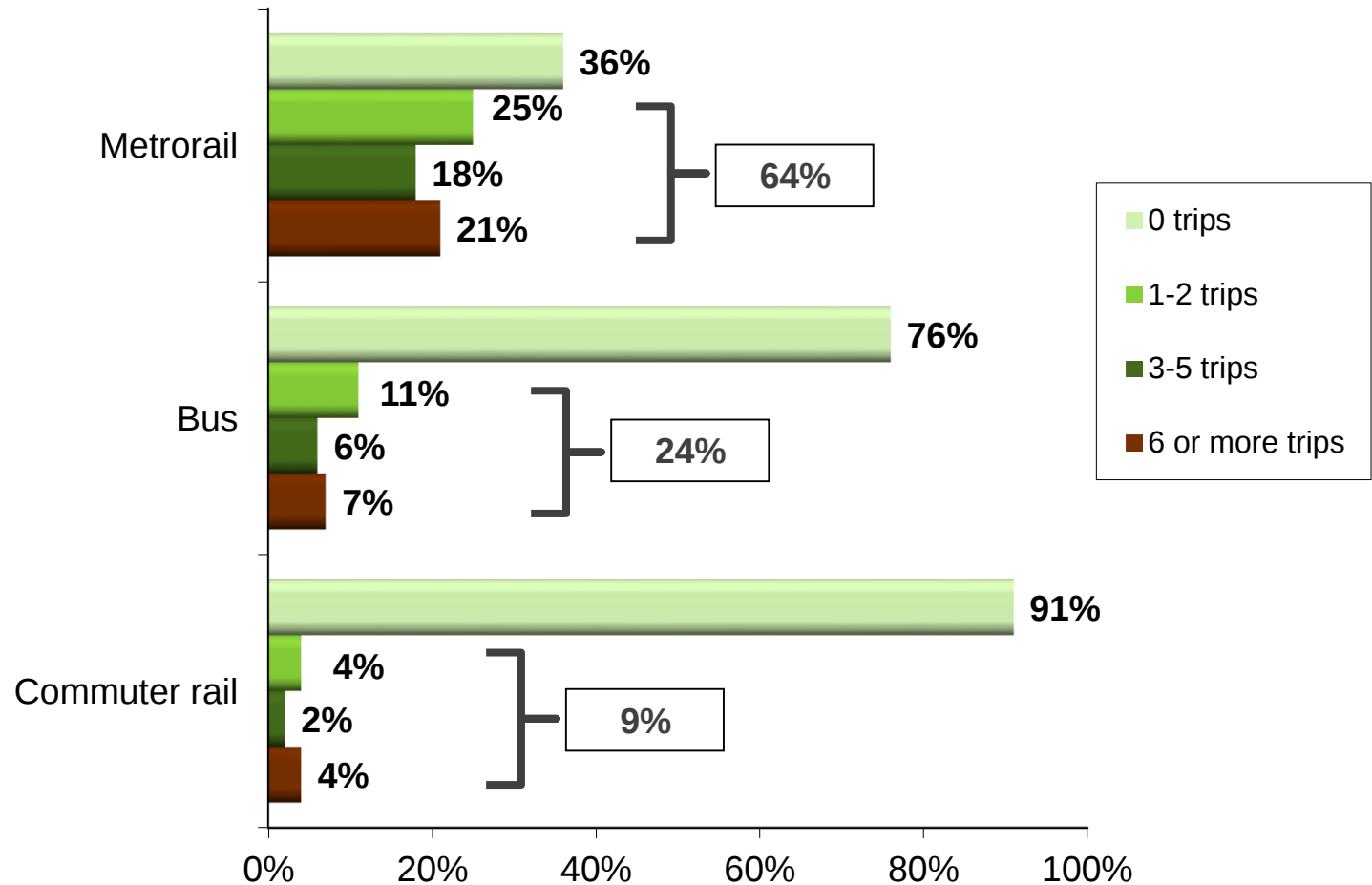
Vehicle
available
n = 2,459

Q10 How often do you use Capital Bikeshare for each of the following types of trips?

Q25 Do you have [a car, van, SUV, truck, or other personal vehicle] available to you on a regular basis for your travel?

CB Also Serves an Important Transit Access Role

64% of members used CB at least once in the past month to access Metrorail; 24% used CB to access bus





Most Recent Bikeshare Trip

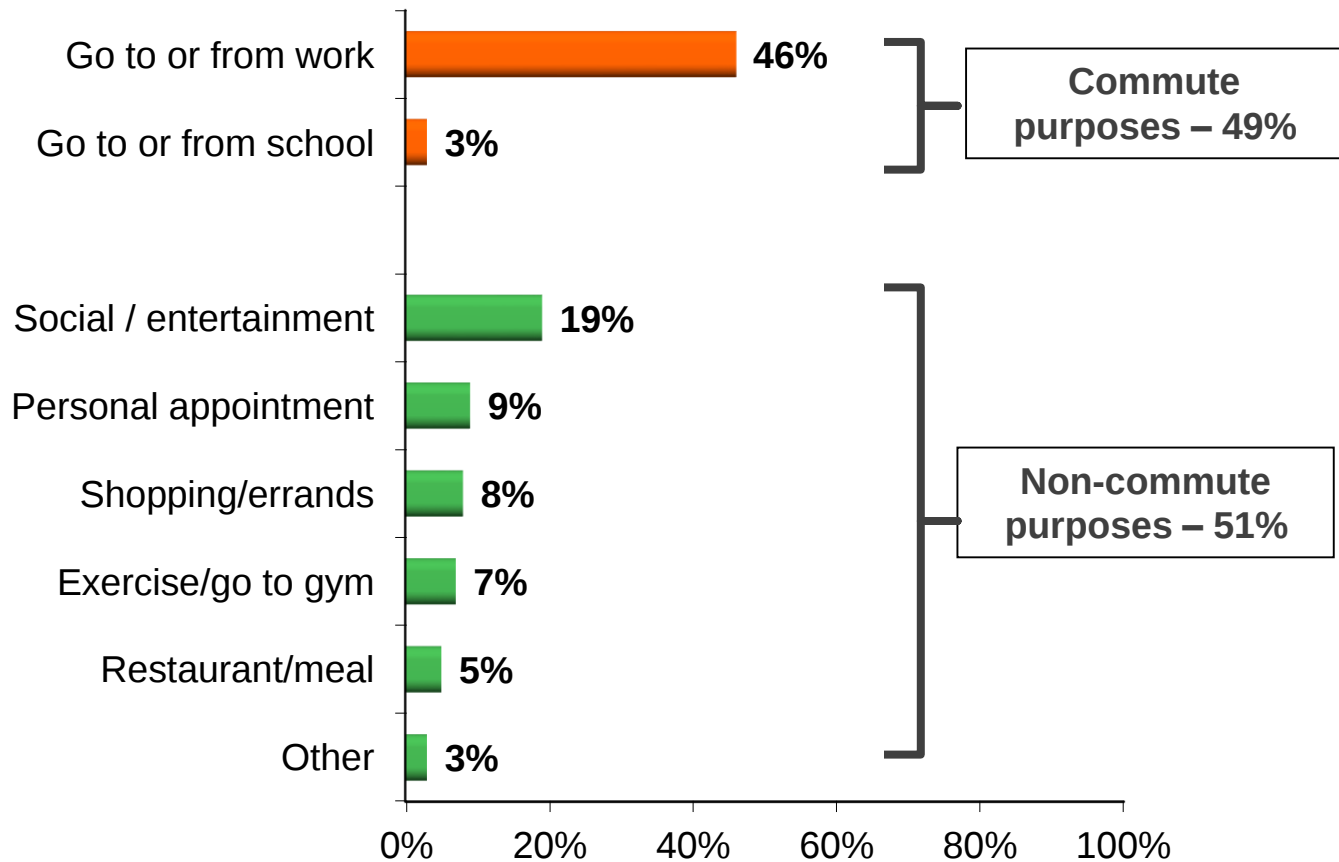


“Most Recent” Trip

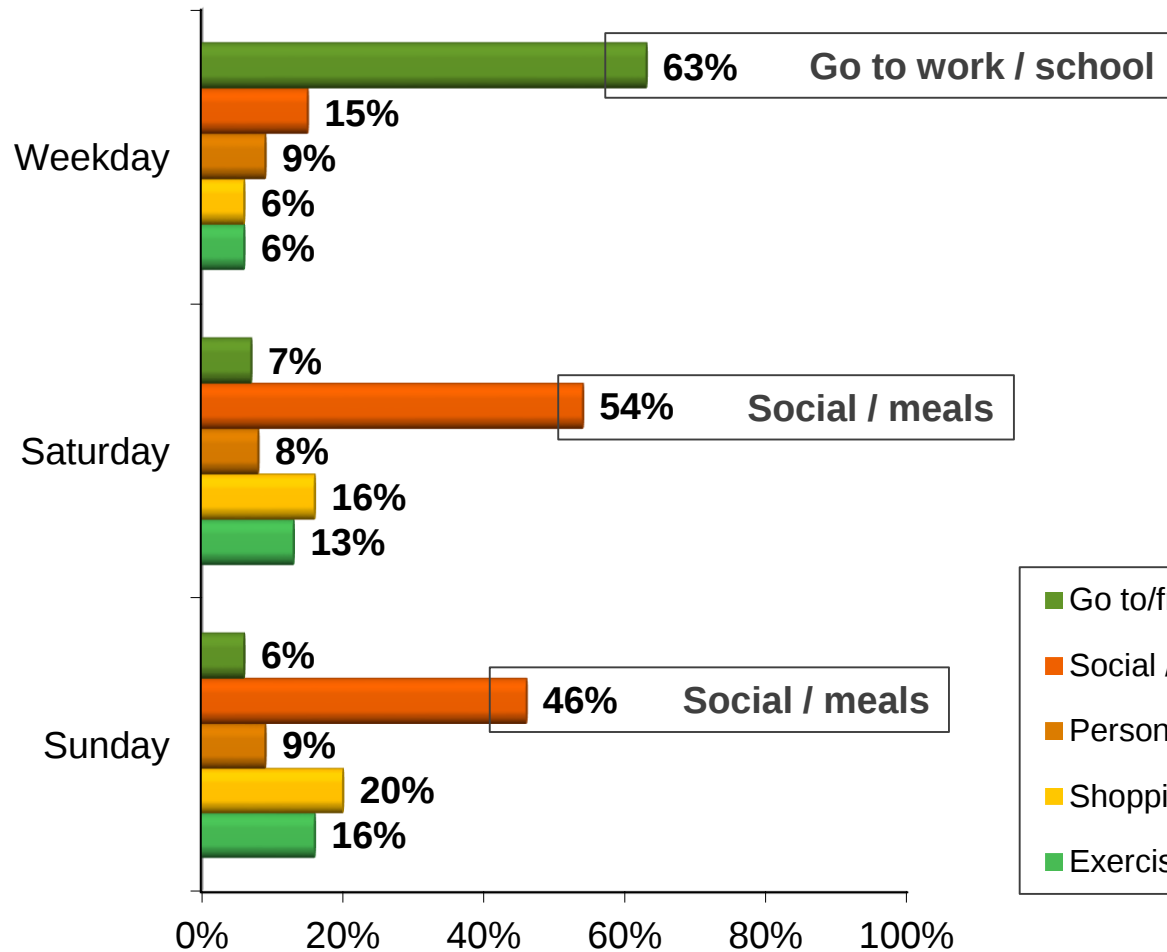
- Analysis examined the characteristics of the **“most recent”** Capital Bikeshare trip. Because each respondent had just one recent trip, the collection of these trips is a close approximation of the “average” trip.
 - Recent trip characteristics:
 - Trip purpose
 - Weekday vs weekend trips
 - Origins and destinations
 - Reasons for using CB
 - Travel option chosen if CB not available
-

Respondents' Recent Trip Purposes Were Evenly Split Between Commute and Non-commute Purposes

The most common trip purpose overall was to go to work;
Non-work trips, while frequent, were more varied



63% of Weekday Trips were to Go to/from Work or School; 94% of Weekend trips were for Non-work Purposes



- Go to/from work/school
- Social / entertainment / meals
- Personal appointments
- Shopping / errands
- Exercise / recreation

2014 Survey
Most recent trip
made on:

Weekday
n = 3,185

Saturday
n = 466

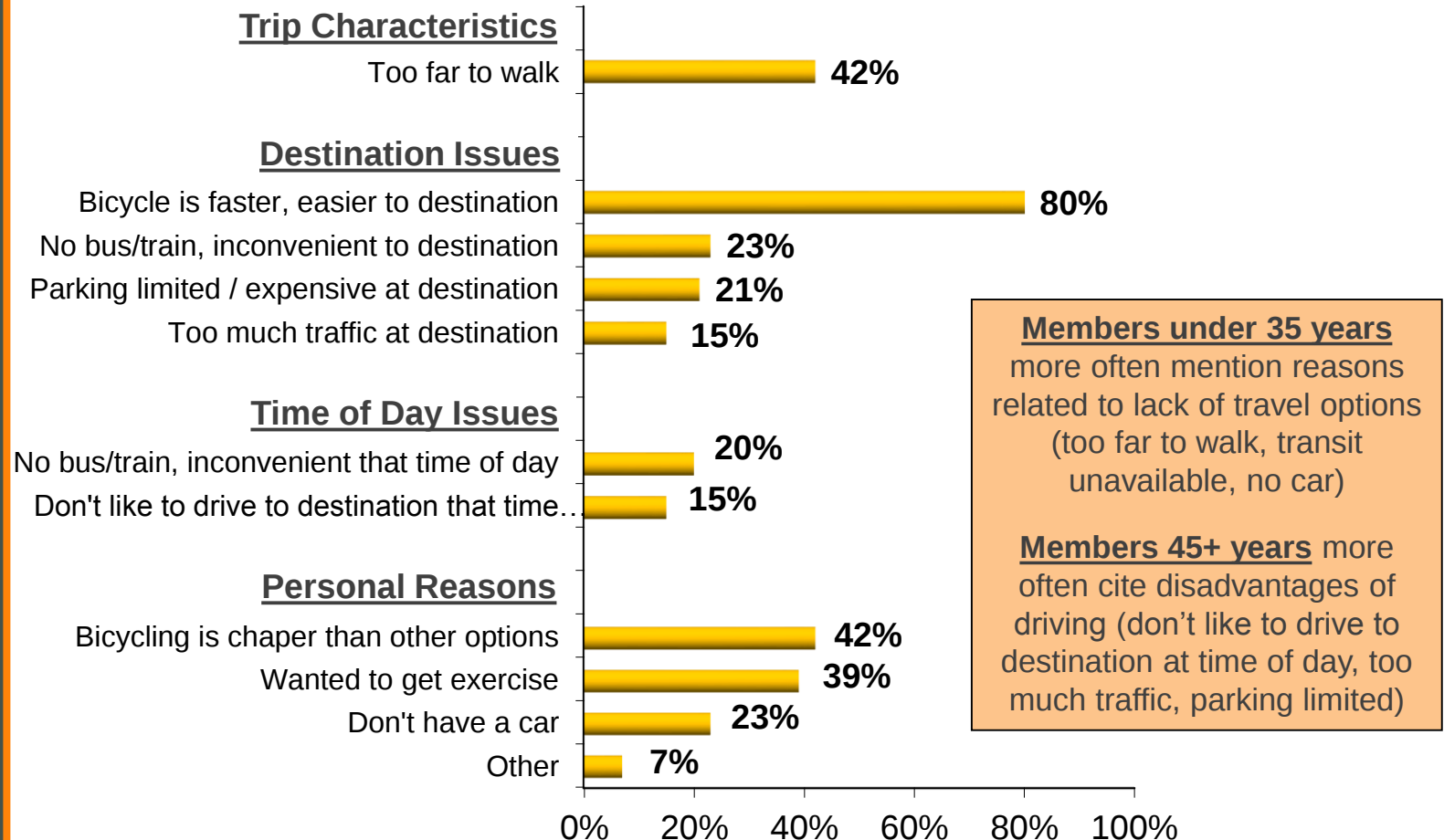
Sunday
n = 356

Q11 What was the primary purpose of your MOST RECENT Capital Bikeshare trip?

Q12 On what day of the week did you make your most recent Capital Bikeshare trip?

CB was Chosen for Most Recent Trips Primarily Because Bicycle was Faster / Easier to Use

Also: too far to walk, cheaper, wanted to get exercise



CB is More Likely to Replace Transit and Walk than Driving – 40% of Members Would have Used Transit for their Last CB Trip and 37% Would have Walked if CB had Not Been Available

Only 6% would have used a personal vehicle

Alternative Mode Options by Purpose:

Taxi (6% overall)

12% of social trips

13% of appointment trips

Transit (40% overall)

51% of go to/from work trips

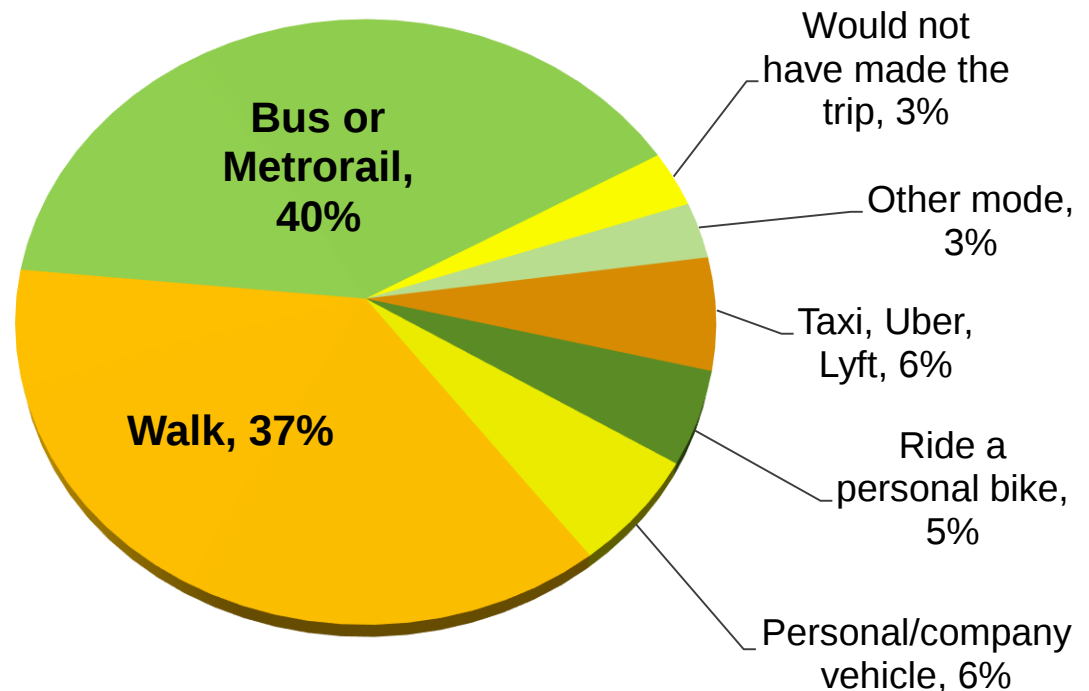
Walk (37% overall)

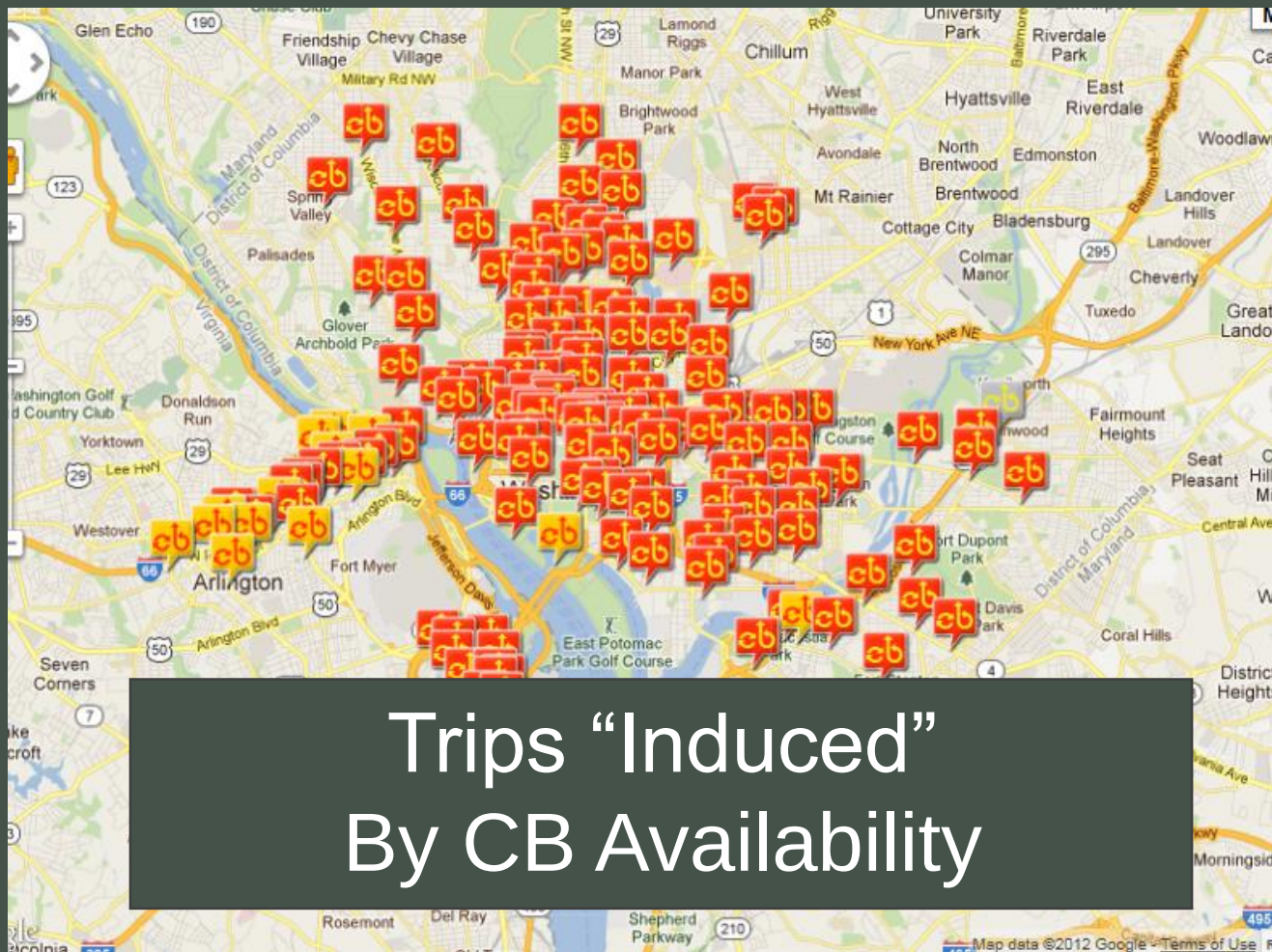
53% of shopping / errand trips

43% of exercise trips

Personal Car (6% overall)

12% of meal trips

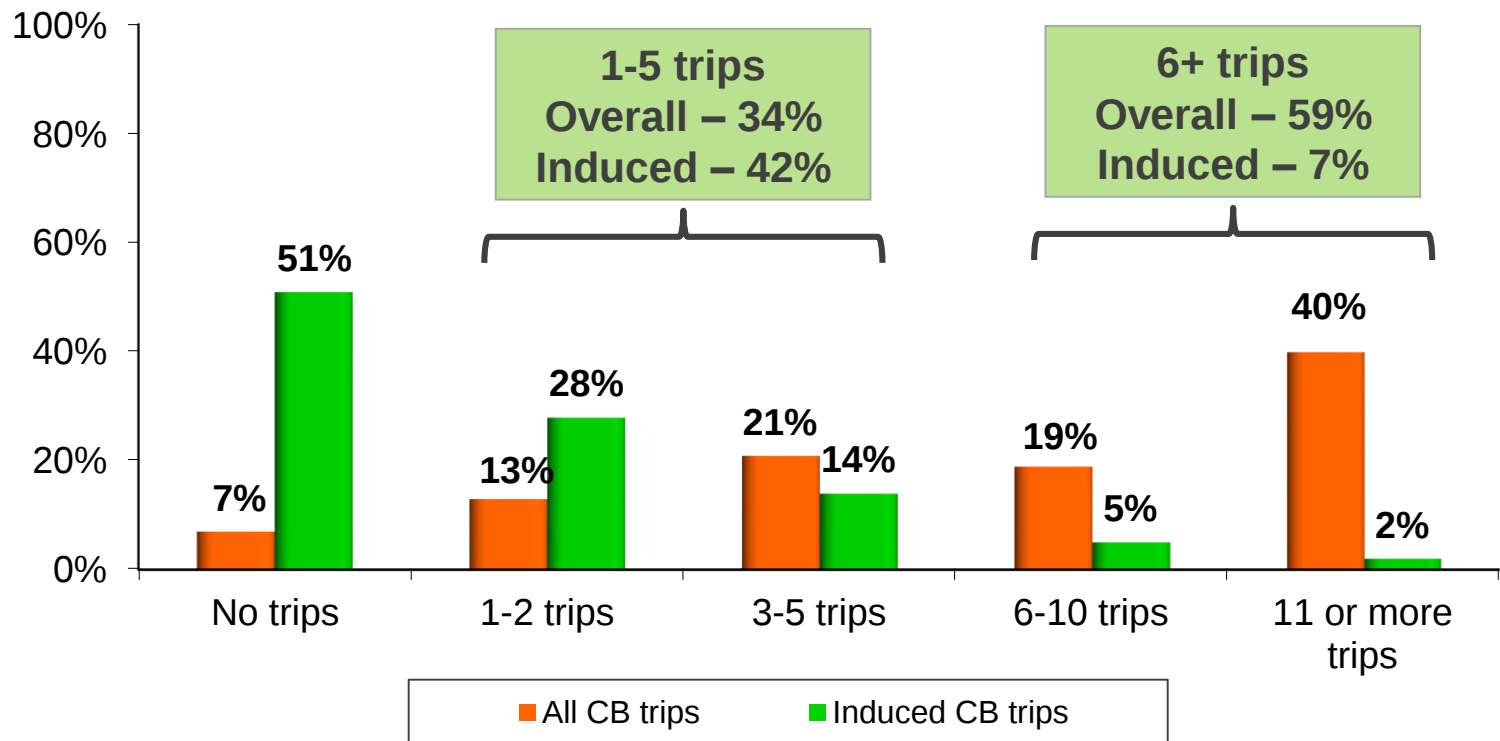




49% of Members Made an Induced Trip in Past Month

7% Made Six or More Induced Trips

“In the past month, how many times did you use Capital Bikeshare to make a trip you would not have made if Capital Bikeshare had not been available?”



2014 Survey

All trips
n = 4,312

Induced trips
n = 4,312

Q8 In the past month, about how many Capital Bikeshare trips did you make?

Q17 In the past month, how many times did you use Capital Bikeshare to make a trip you would not have made if Capital Bikeshare had not been available?

Who was Most Likely to Make Induced Trips ...?

Members Made 1+ Induced Trip in Past Month ...

All members

49%

Members who ...

vs average

- | | | |
|------------------------------------|-----|-----|
| ■ had income <u>under \$75,000</u> | 57% | +8% |
| ■ had <u>no personal vehicle</u> | 56% | +7% |
| ■ were <u>male</u> | 53% | +4% |
| ■ had <u>no personal bicycle</u> | 52% | +3% |
| ■ were <u>younger than 35</u> | 51% | +2% |

2014 Survey

All members
n = 4,331

Income under
\$75,000
n = 1,195

No personal
vehicle
n = 1,855

Male
n = 2,340

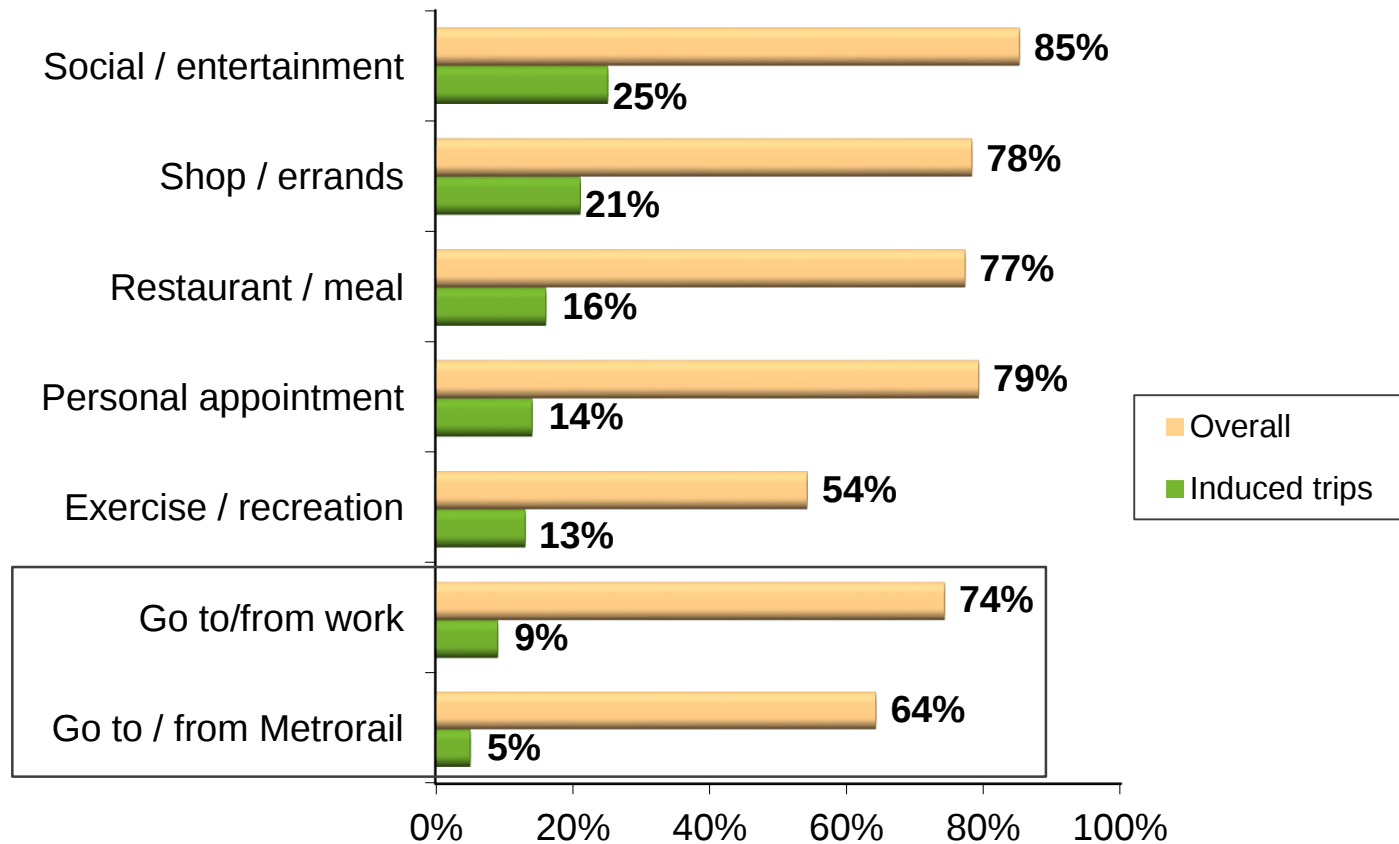
No personal
bicycle
n = 2,091

Under 35
n = 1,358

Q17 In the past month, how many times did you use Capital Bikeshare to make a trip you would not have made if Capital Bikeshare had not been available?

Most Induced Trips were Non-work-related and were Distributed Similarly to Overall Non-work Trip Use

Few induced trips were for commuting or transit access



2014 Survey

Overall
n = 4,236

Induced trips in
past month
n = 4,299

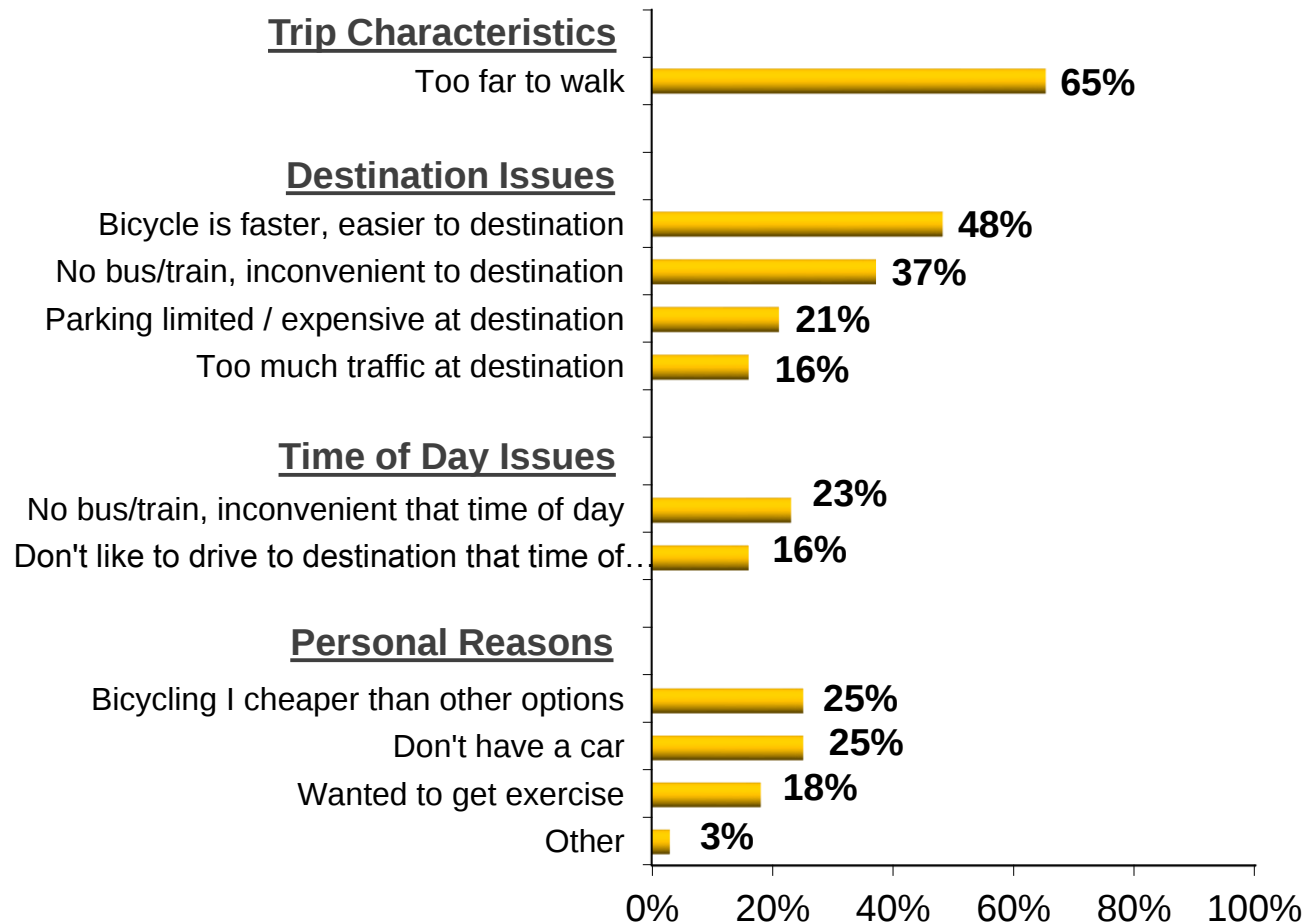
Q10 How often do you use Capital Bikeshare for each of the following types of trips?

Q17 In the past month, how many times did you use Capital Bikeshare to make a trip you would not have made if Capital Bikeshare had not been available?

Q18 For what purposes did you make these trips?

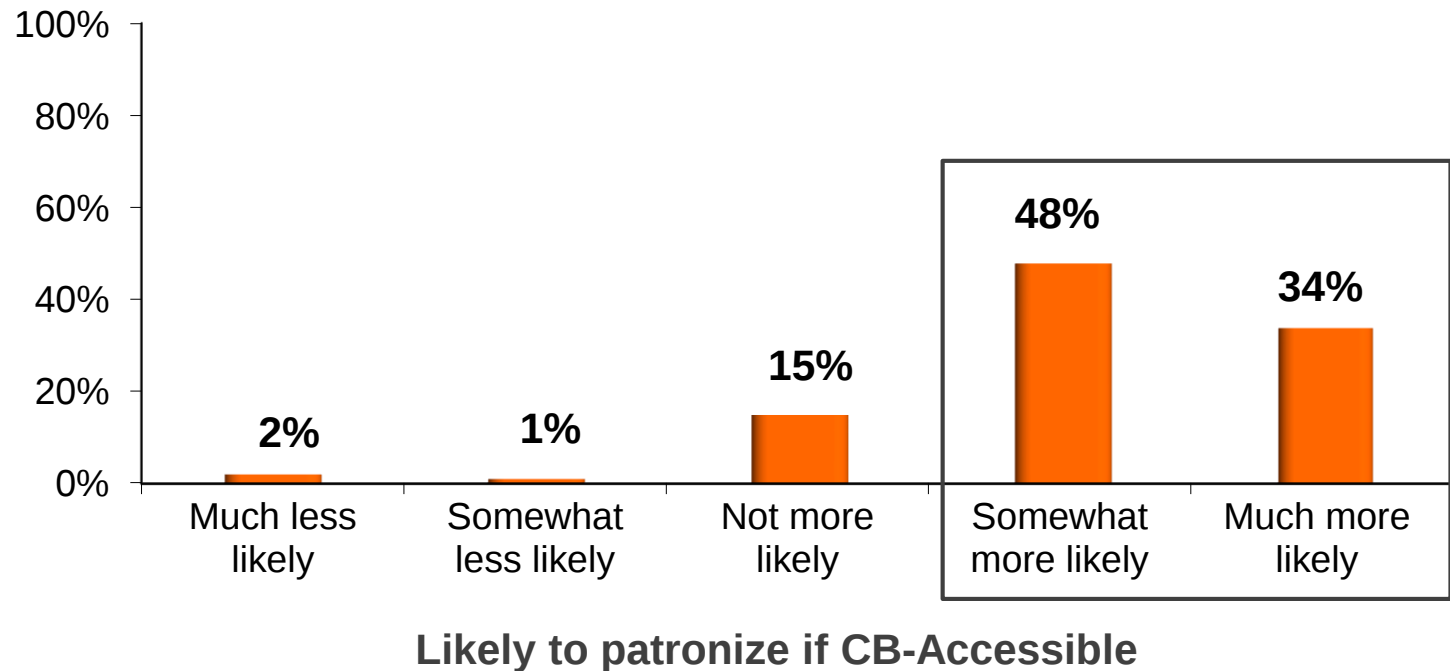
CB was Used for Induced Trips Primarily Because the Destination was Too Far to Walk

Suggests members might have substituted trips to distant locations for trips they would have made closer to home



CB-Access Made Business Establishments More Attractive to 82% of Members

“If a business, restaurant, or shop is easily accessible by Capital Bikeshare, does that access make you more or less likely to patronize that establishment?”



Result of high value of CB-access was consistent across all respondent demographic subgroups

Members who Reported Higher Value of CB-Access Made More Induced Trips

70% who were “much more likely” to patronize made an induced trip in past month, vs 42% who were “somewhat more likely” and 30% who were “not more likely”

Made 6+ CB trips last month: By likely to patronize:

Much more likely – 50%

Somewhat more likely – 36%

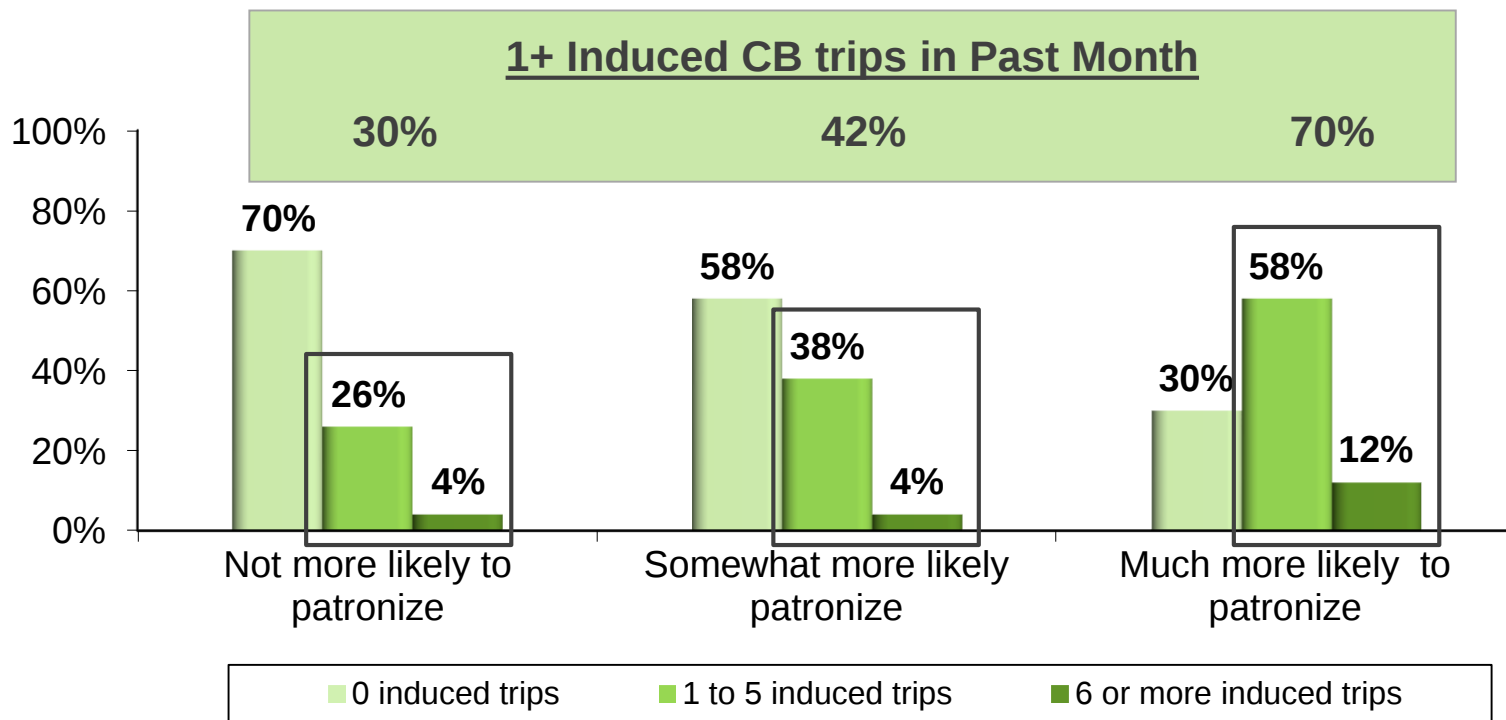
Not more likely – 34%

2014 Survey

Not more likely
n = 721

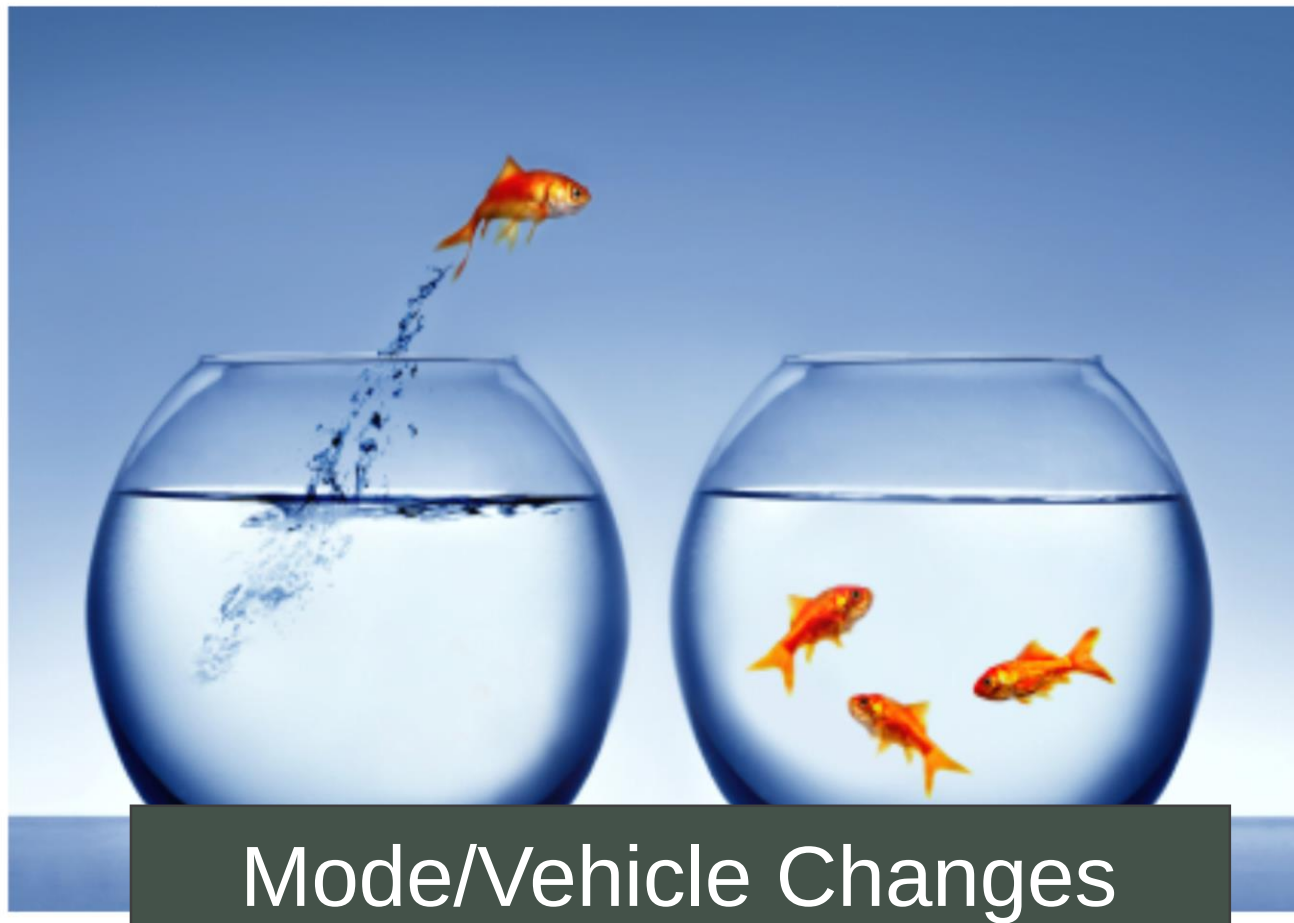
Somewhat more likely
n = 2,018

Much more likely
n = 1,424



Q20 If a commercial / retail business, restaurant, or shop is easily accessible by Capital Bikeshare, does that access make you more or less likely to patronize that establishment?

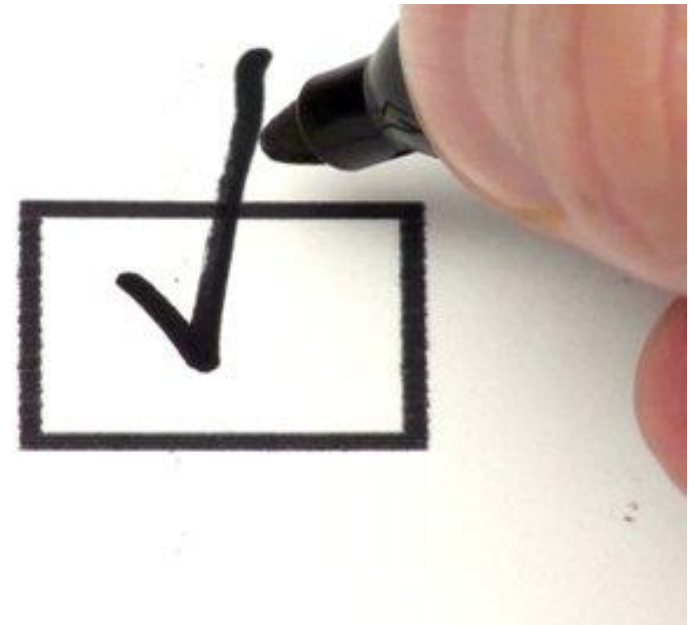
Q17 In the past month, how many times did you use Capital Bikeshare to make a trip you would not have made if Capital Bikeshare had not been available



Mode/Vehicle Changes
Since Joining CB

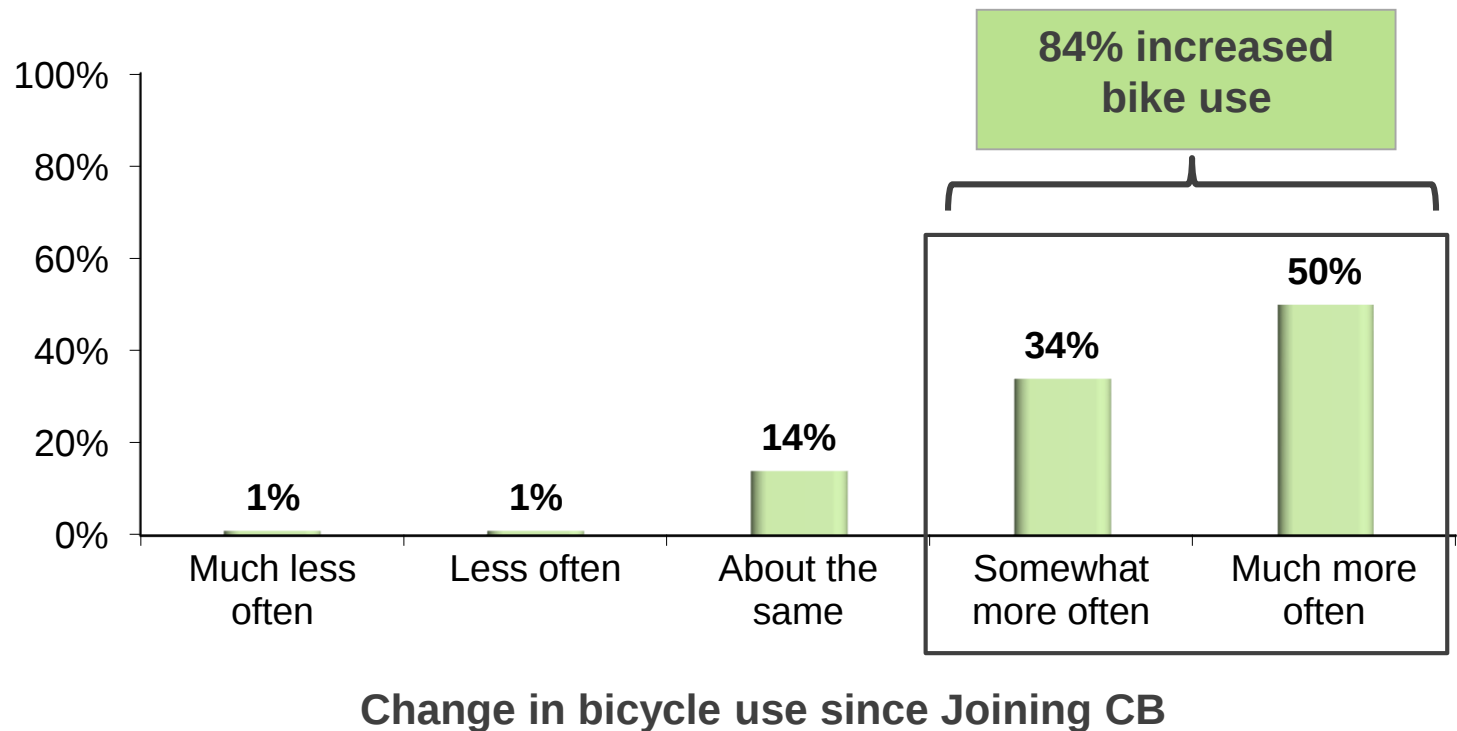
Members were Asked if They Made Changes in Any of Five Aspects of Travel:

- Bicycle use (any bicycle)
- Use of non-bicycle modes
- Vehicle ownership
- Driving miles
- Commute mode



84% of Members Said they Increased their Bicycle Use Since Joining CB

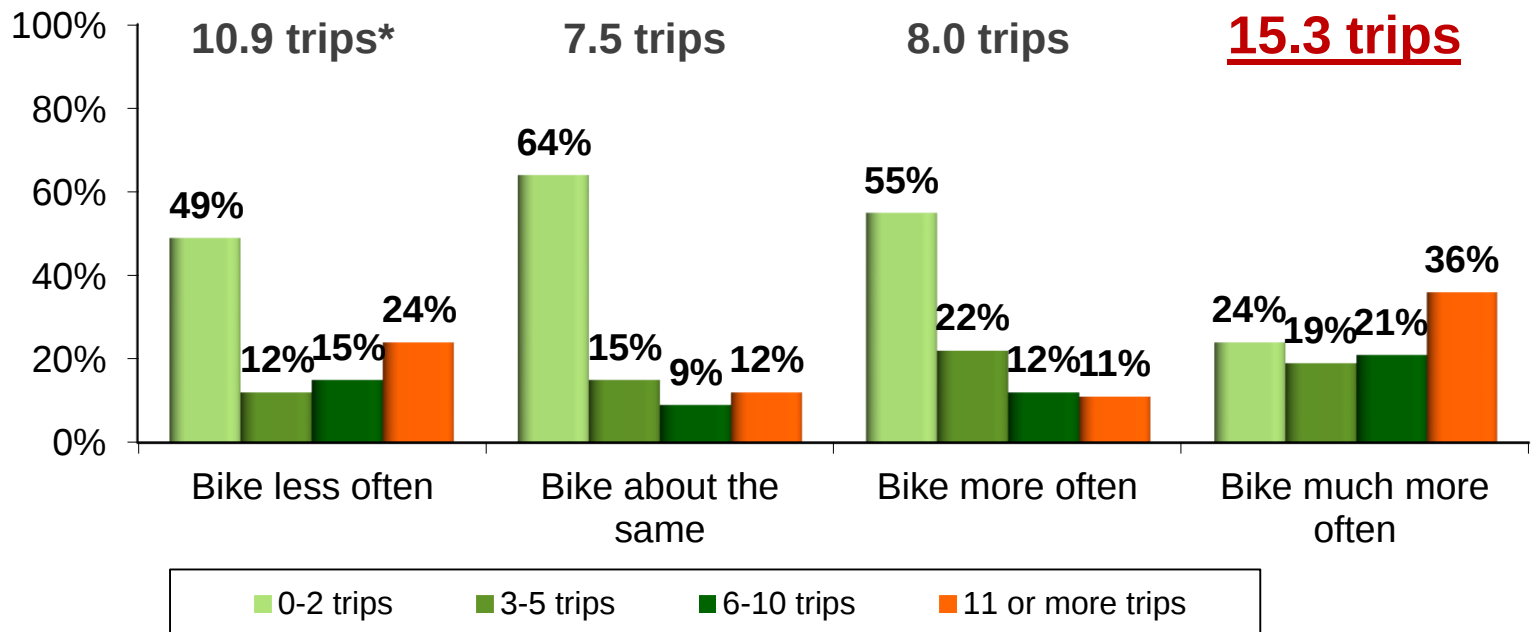
50% reported bicycling “much more often”



Highest CB Use was Reported by Members Who Increased Bike Use the Most

But members who reported biking “less often” also reported high CB use – did they shift from personal bike?

CB trips last month



Bike use compared to before joining CB

* Less often
n = 89 (note small sample)

About the same
n = 607

More often
n = 1,450

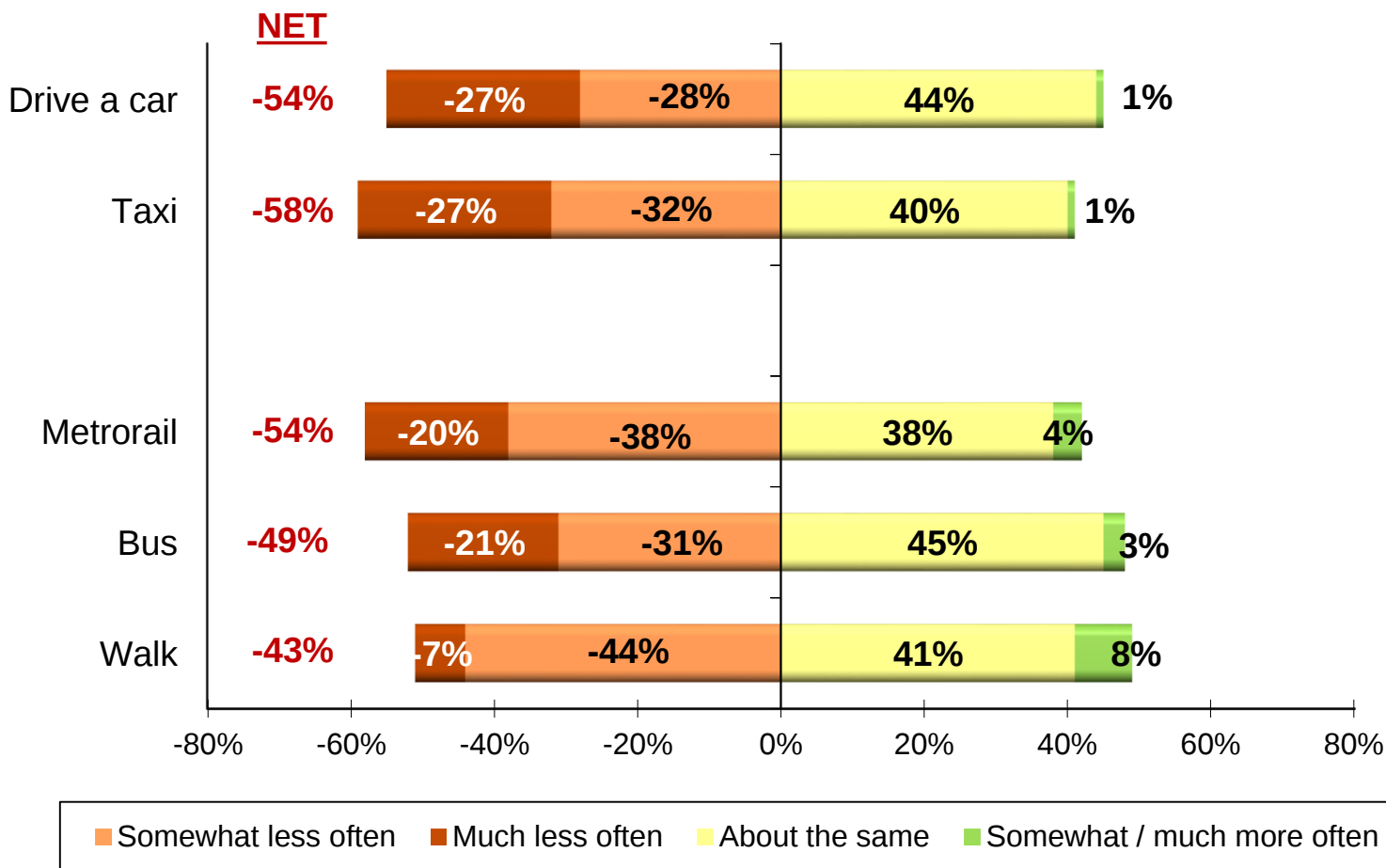
Much more often
n = 2,144

Q22 As a result of your use of Capital Bikeshare, do you ride a bicycle more often, less often, or about the same as before you joined Capital Bikeshare? Please include your use of Capital Bikeshare AND any personal bicycles?

Q8 In the past month, about how many Capital Bikeshare trips did you make?

A Large Share of Members Reduced Car Use, but also Use of Transit, Walk, and Taxi

Indicates likely shifts to bike from all other modes



2014 Survey

Metrorail
n = 4,244

Bus
n = 4,191

Walk
n = 4,219

Drive a car
n = 4,154

Taxi
n = 4,175

Note: Results for
“more often” and
“much more often”
are combined

Q24 As a result of your use of Capital Bikeshare, do you use each of the following types of travel options more often, less often, or about the same as before you joined Capital Bikeshare ...? ...?

Frequent CB Users Reduced Use of Other Modes More than did those who Used CB Less Often

Most significant shifts appeared to be from Metrorail and bus

CB Trips In Past Month	Percentage of Members who Reduced Use of Mode				
	Metrorail	Bus	Walk	Drive a Car	Taxi
1-5 trips	46%	40%	46%	49%	55%
6-10 trips	62%	56%	53%	56%	62%
11-19 trips	66%	60%	57%	62%	65%
20 or more trips	74%	66%	57%	61%	63%
Difference between 20+ and 1-5	28%	26%	11%	12%	8%

2014 Survey

1-5 trips
n = 1,435

6-10 trips
n = 787

11-19 trips
n = 672

20+ trips
n = 983

Q24 As a result of your use of Capital Bikeshare, do you use each of the following types of travel options more often, less often, or about the same as before you joined Capital Bikeshare ...?

Q8 In the past month, about how many Capital Bikeshare trips did you make?

Car-free Members had Greater “Net Reductions” in Use of Taxi, Transit, and Walking than did Members who had a Vehicle

They also reduced car use, but less than did members with a car

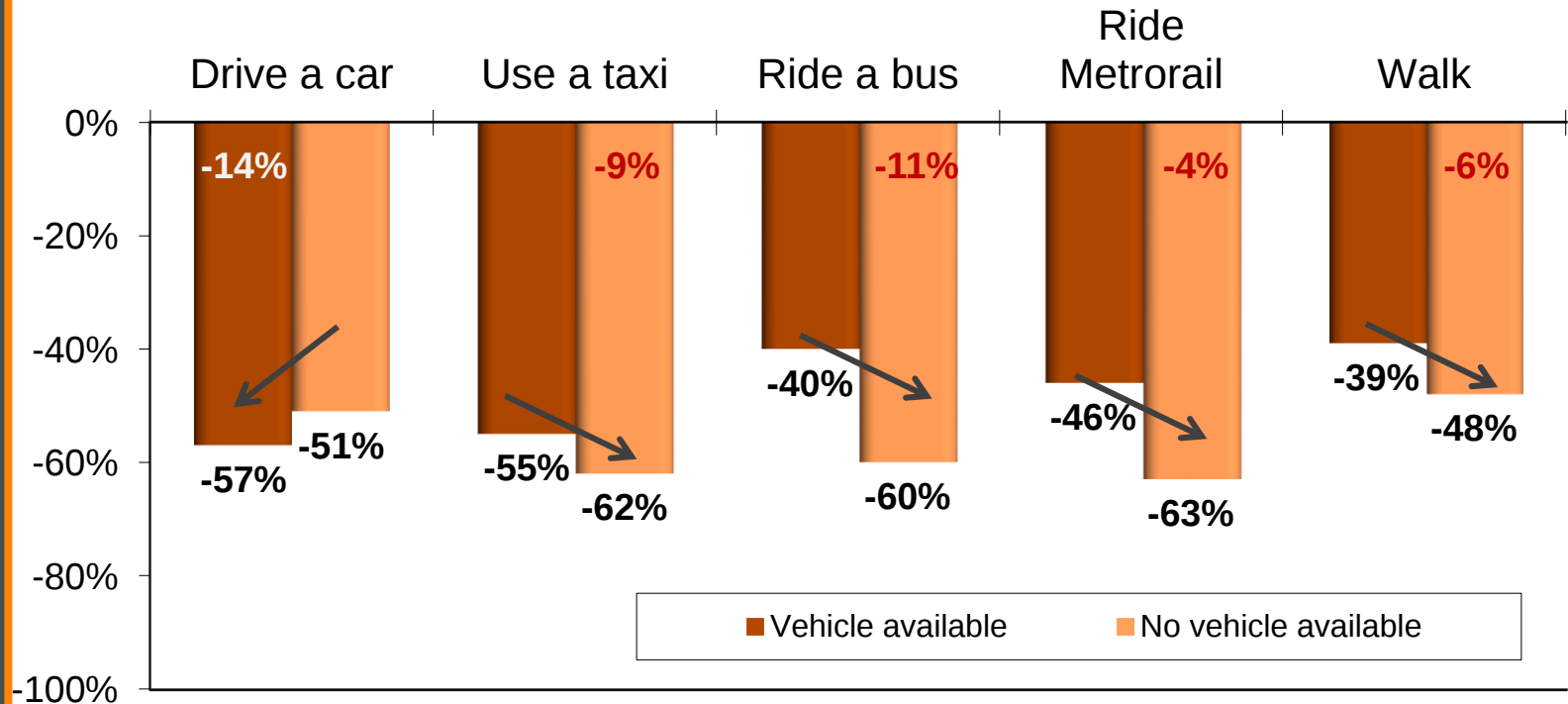
“Net reduction” = percent of members who reduced mode use minus percent who increased mode use

2014 Survey

Vehicle available
n = 2,371

No vehicle available
n = 1,804

“Net reduction” in mode use

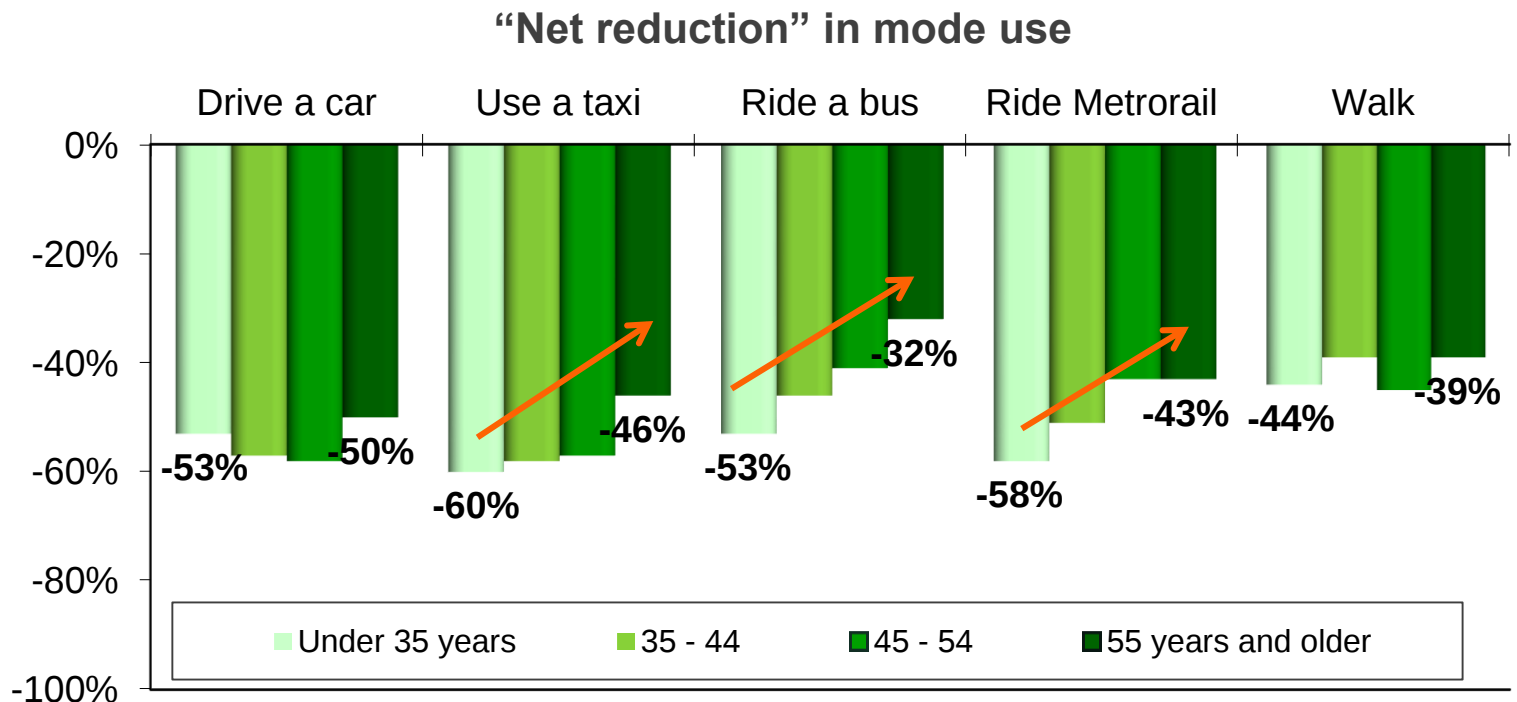


Q24 As a result of your use of Capital Bikeshare, do you use each of the following types of travel options more often, less often, or about the same as before you joined Capital Bikeshare ...?

Q25 Do you have [a car, van, SUV, truck, or other personal vehicle] available to you on a regular basis for your travel?

Young Members had Greater “Net Reductions” in Use of Taxi and Transit than did Older Members

Older members had greater reduction in car use, but this likely reflects their greater car availability



2014 Survey

Under 35 years
n = 2,317

35-44 years
n = 798

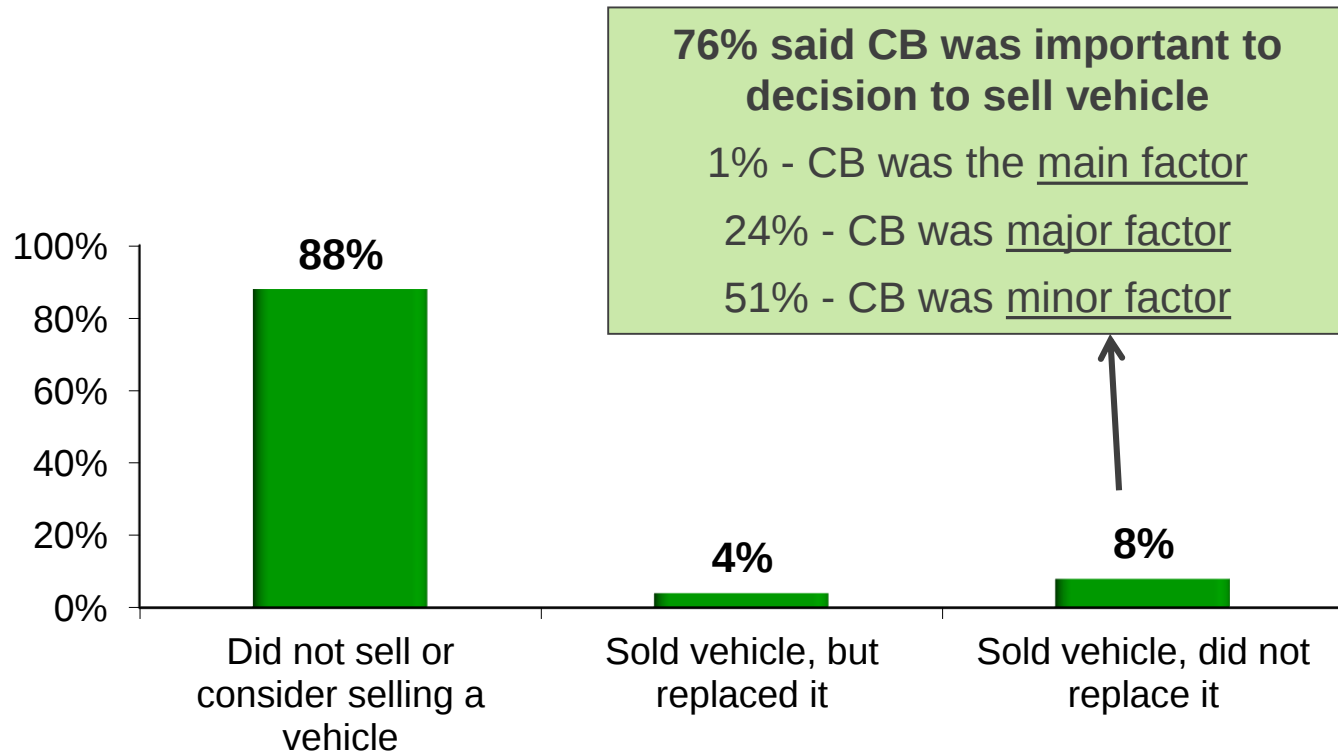
45-45 years
n = 468

55+ years
n = 307

Q24 As a result of your use of Capital Bikeshare, do you use each of the following types of travel options more often, less often, or about the same as before you joined Capital Bikeshare ...?

Q52 What is your age?

8% of Members Reduced their Household Vehicles; 4% Sold a Vehicle but Replaced It



2014 Survey

Sold HH
vehicle
n = 4,101

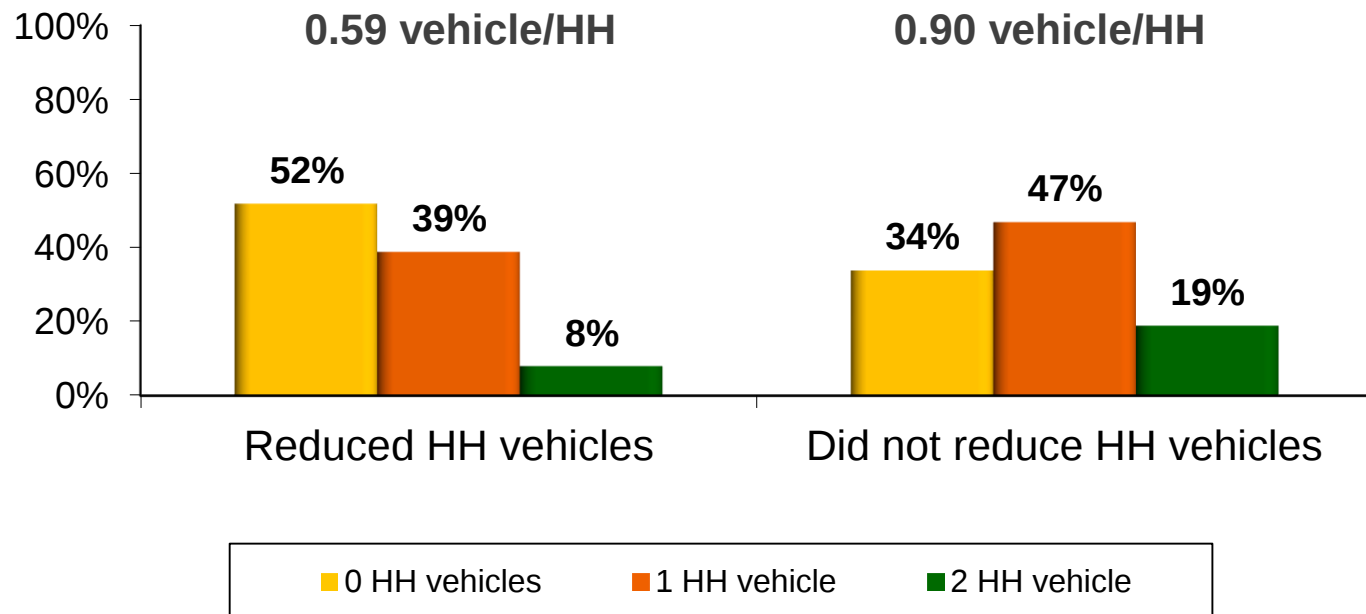
Factor in
decision
n = 248

Q31 Since you joined Capital Bikeshare, have you sold a personal household vehicle?

Q32 To what extent did your membership in Capital Bikeshare contribute to your decision to sell a personal vehicle?

52% of Members who Reduced their Household Vehicles Now Live in a Car-free Household – They Eliminated their Only Vehicle

Average vehicles per household



Drive less?

77% of members who reduced HH vehicles

VS

52% of members who did not reduce HH vehicles

2014 Survey

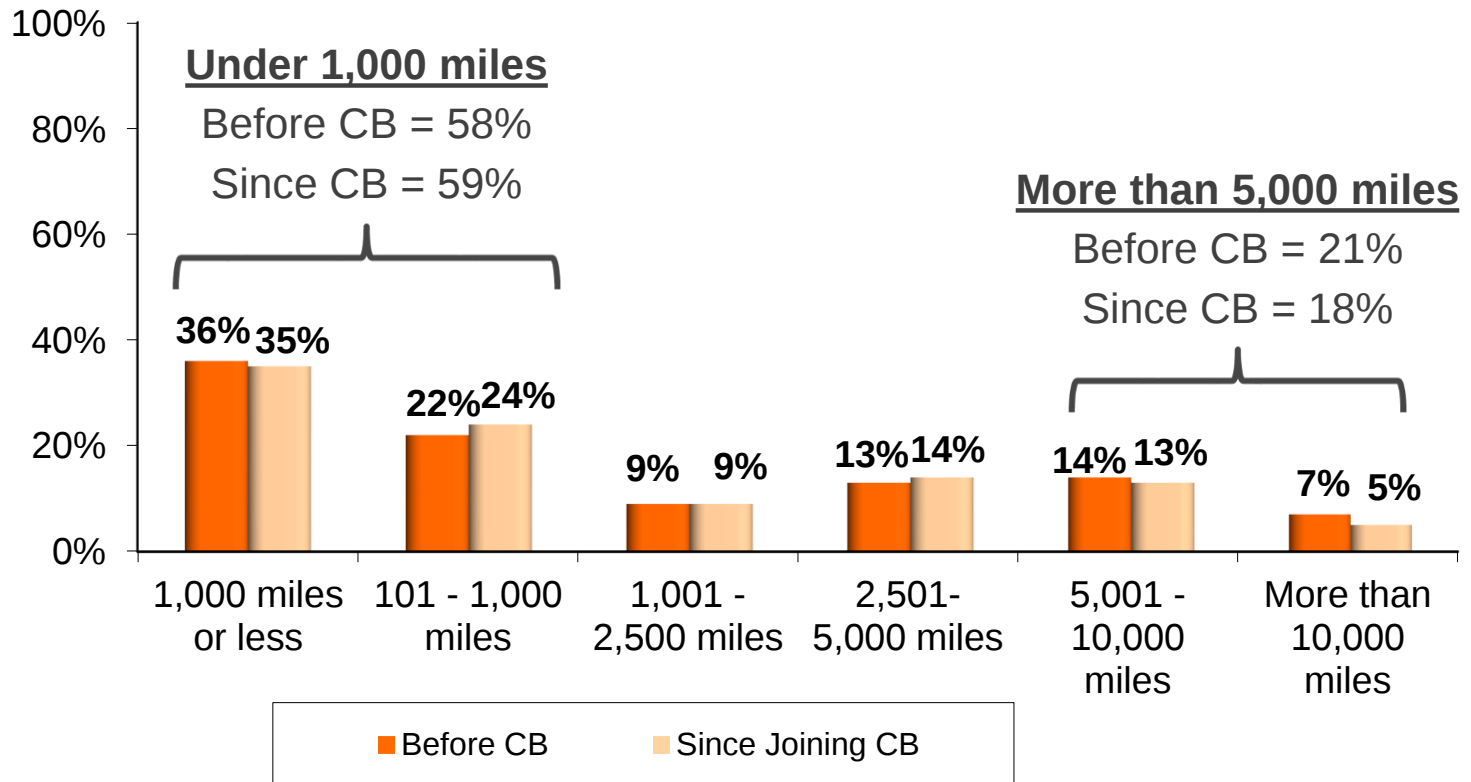
Reduced HH vehicle
n = 309

Did not reduce HH vehicles
n = 3,737

Q31 Since you joined Capital Bikeshare, have you sold a personal household vehicle?

Q29 How many cars, trucks, vans, or other personal vehicles do you or other members of your household own or lease now for household use?

Before CB, 21% of Members Drove at Least 5,000 Miles Annually, Since Joining CB, 18% Drive 2,500+



2014 Survey

Before CB
n = 3,747

Since Joining
CB
n = 3,790

Q26 Approximately how many miles do you drive per year now in the Washington metro region (including miles in vehicles you own, rent, or borrow)?

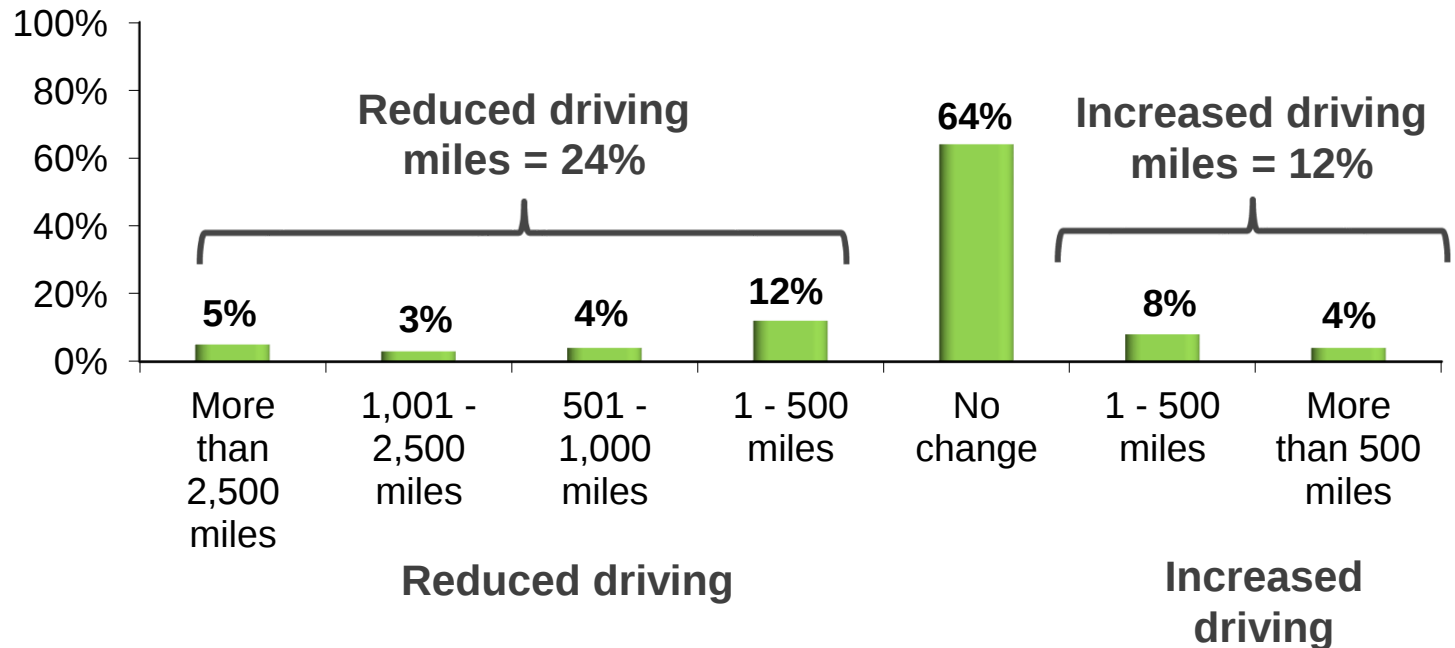
Q27 In the year before joining Capital Bikeshare, approximately how many miles per month did you drive on average in the Washington metro region?

24% of Members Who Reported both Pre-CB and With-CB Mileage Reduced Annual Driving Miles

On average, CB members reduced 158 driving miles per year

88% who reduced driving miles said bikeshare was a factor in their decision

48% said it was the main or a major factor



Q26 Approximately how many miles do you drive per year now in the Washington metro region (including miles in vehicles you own, rent, or borrow)?

Q27 In the year before joining Capital Bikeshare, approximately how many miles per month did you drive on average in the Washington metro region?



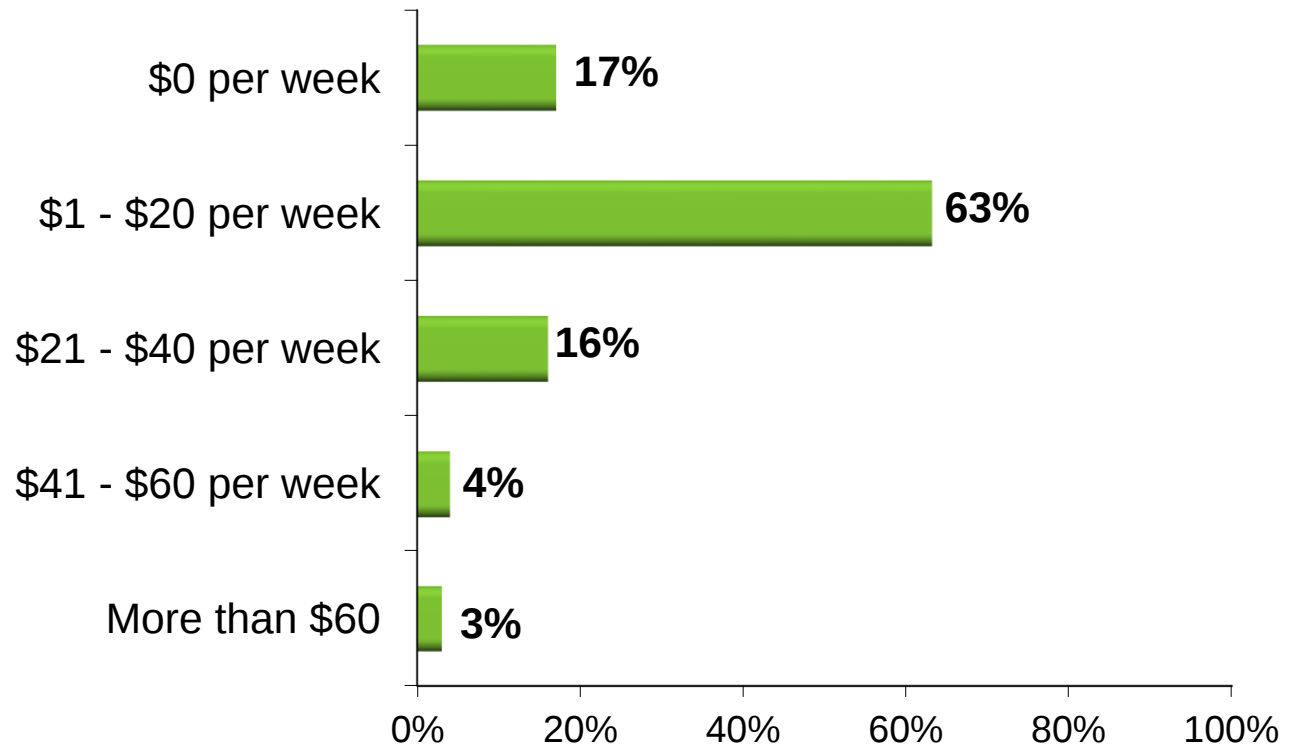
CB Members Reduce 4.4 Million Driving Miles Per Year Compared with their Pre-CB Mileage

Annual miles reduced per member	
Annual driving miles Before CB	2,830
Annual driving miles Since CB	- 2,672
Change in driving miles (each member)	158

Total annual miles reduced	
CB members (Nov 2014)	27,600
Change in driving miles per member	x 158
Total annual driving miles reduced	4.4 million

On Average, Members Save \$13.65 per Week on their Travel Costs = \$710 Per Year

Members who make 11 or more CB trips per month save an average of \$19.26 per week (\$1,002 per year)



CB Members Collectively Save \$19.6 Million Per Year on Personal Travel Costs

Annual travel cost reduced per member	
Weekly travel cost saving	\$13.65
Weeks per year	X 52 =
Annual saving (per member)	\$710

Total travel cost saving	
CB members (Nov 2014)	27,600
Cost saving per member	x \$710
Total annual travel cost saved	\$19,600,000

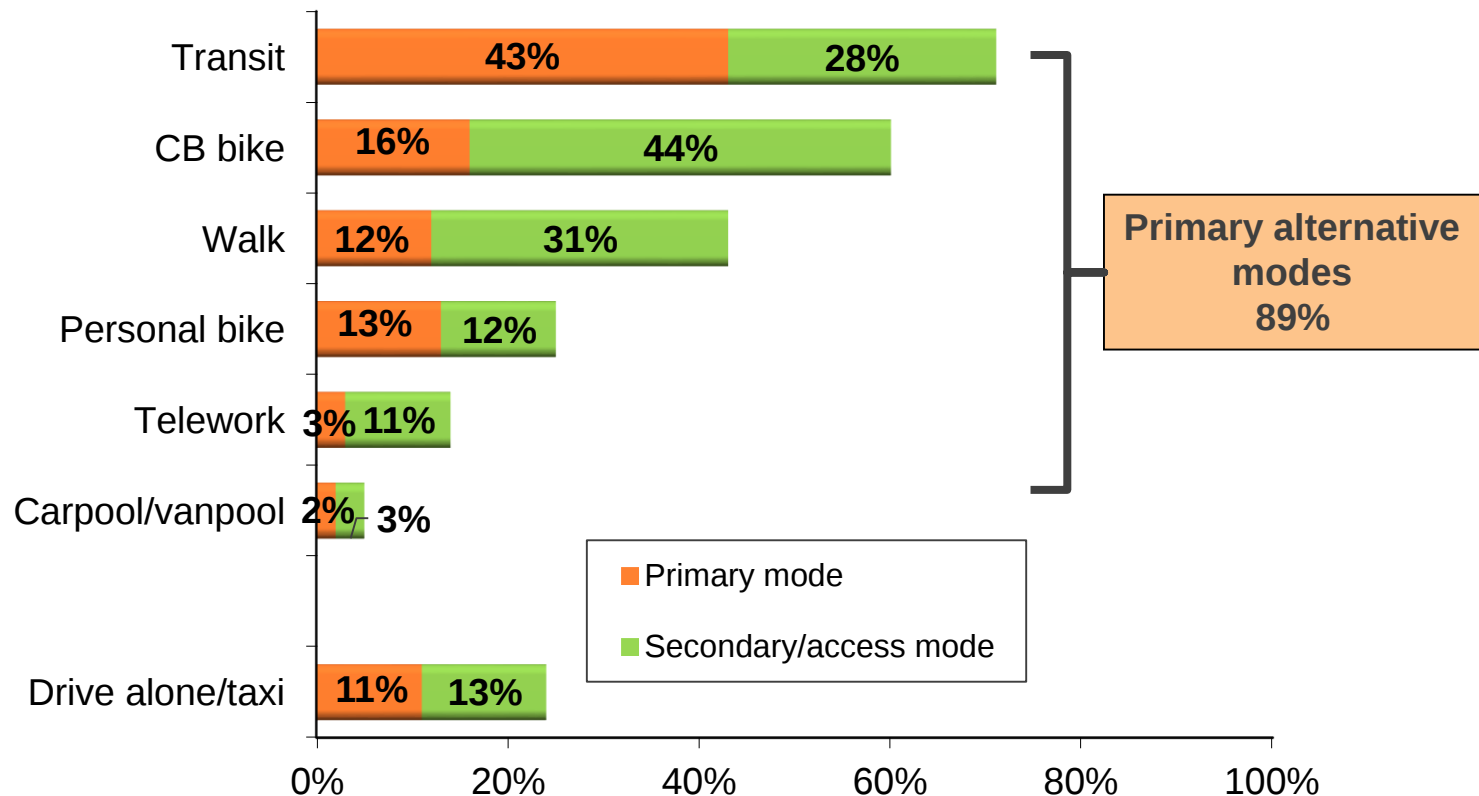
Q21 On a weekly basis, how much money do you think Capital Bikeshare saves you on your travel compared with what you were spending before you joined?



Commute Patterns and Commute Changes

Only 11% of CB Members Primarily Drove Alone to Work – Well Below the 68% Regional Average

29% primarily bicycled to work



Bike use to access other modes

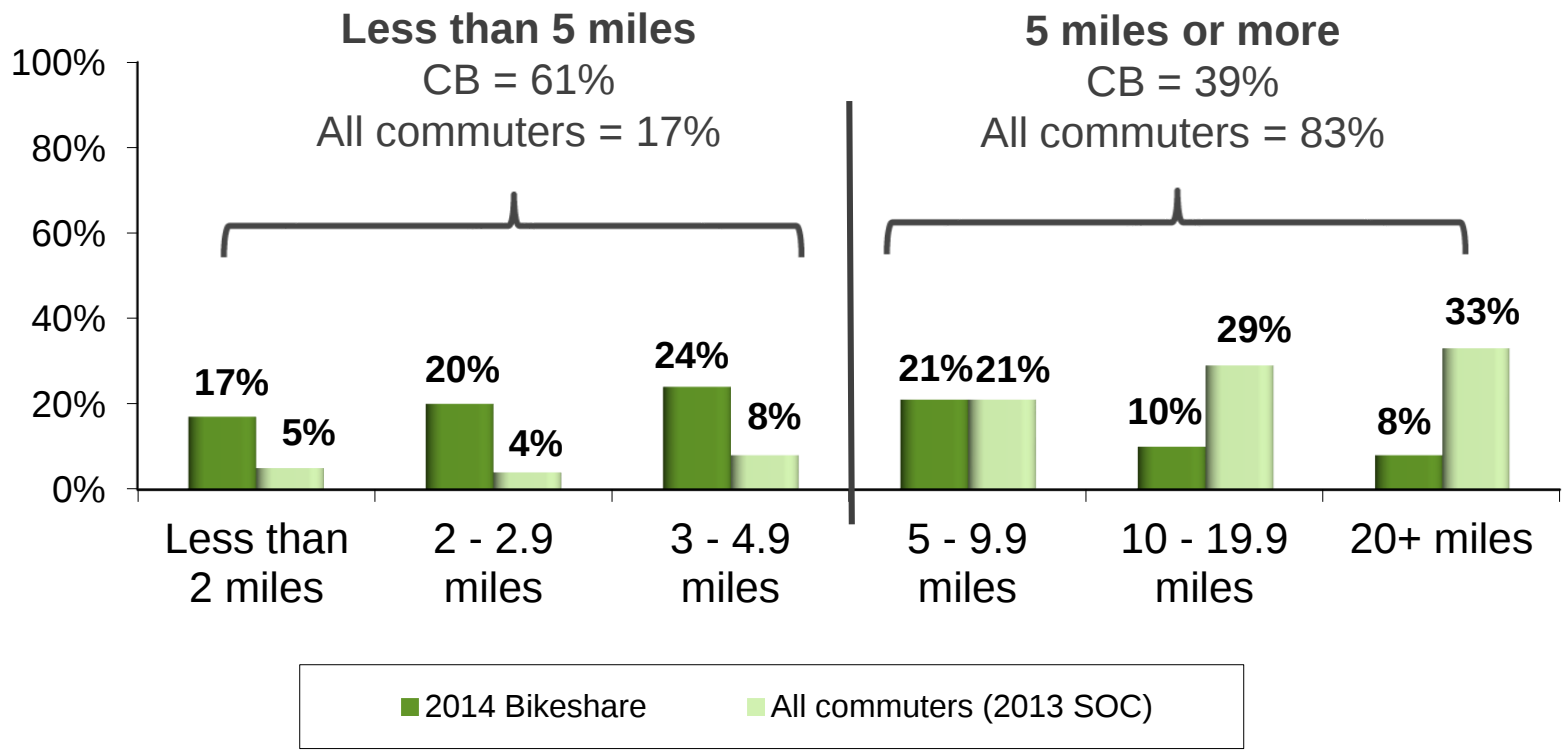
24% used CB to get to transit/CP/VP meeting points

5% used personal bike

CB Members Traveled Much Shorter Distances to Work than did Commuters Region-wide

CB average = 6.2 miles

Regional average = 16.0 miles

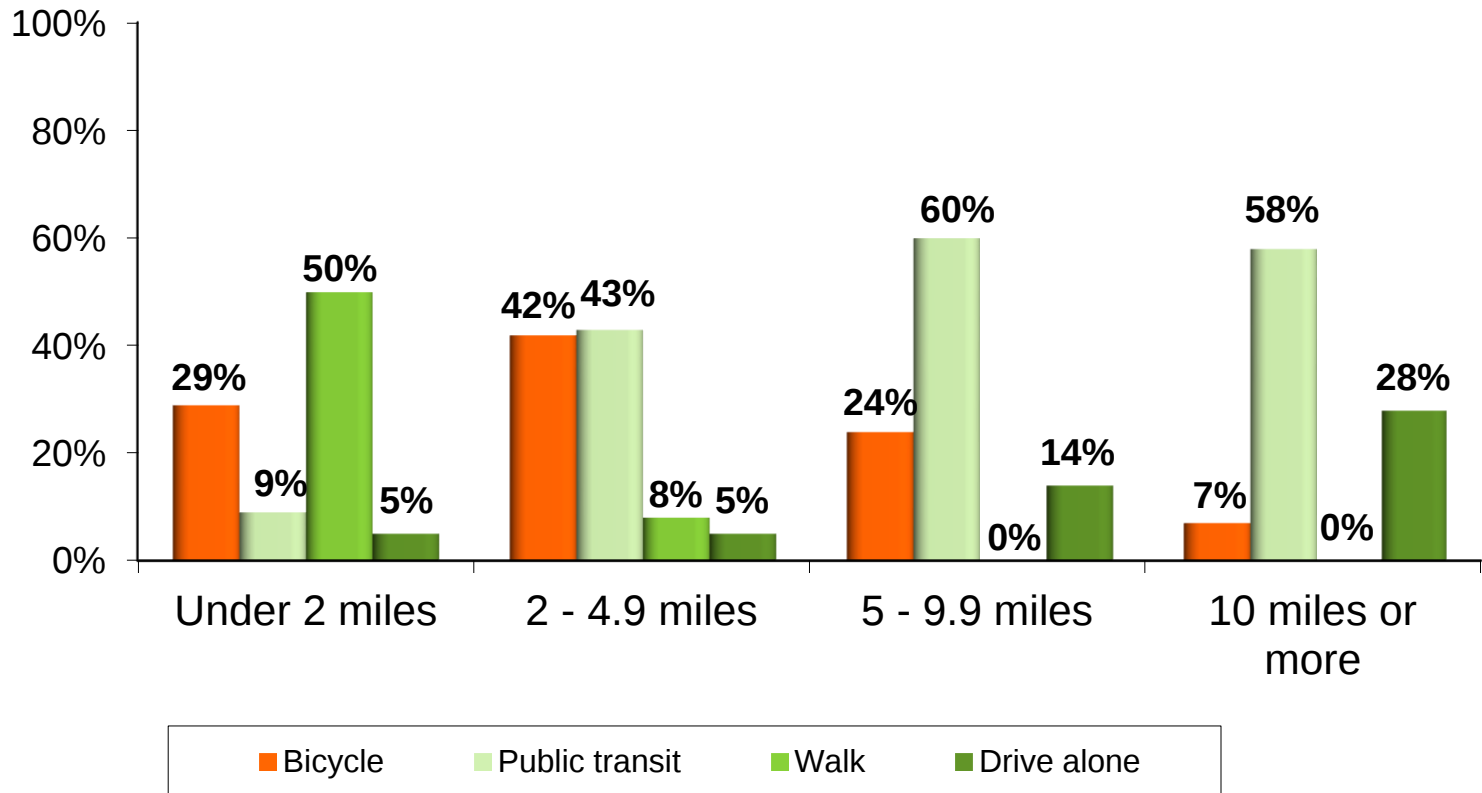


2014 CB
members
n = 3,962

2013 SOC All
Commuters
n = 5,122

Q34 About how many miles is it from your home to your usual work location?

Bike was a Common Primary Mode for Members Who Commuted Fewer than 5 Miles to Work



2014 Survey

Under 2 miles
n = 645

2 - 4.9 miles
n = 1,755

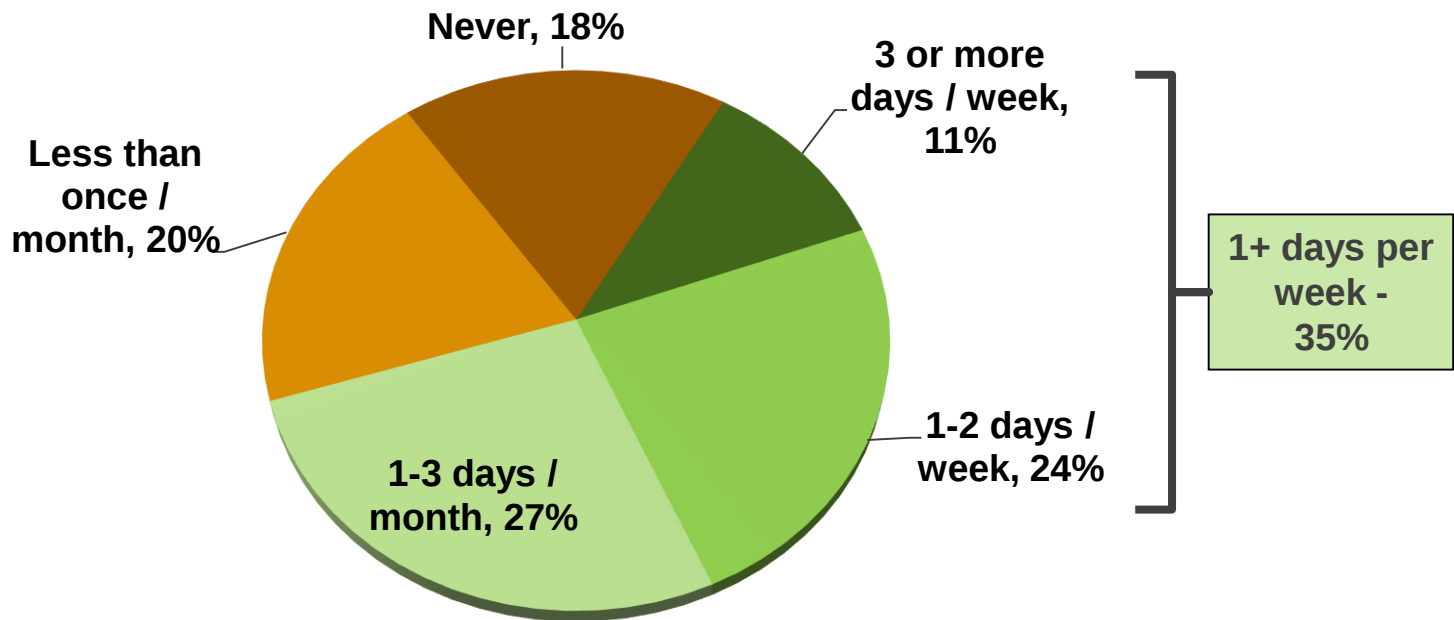
5 - 9.9 miles
n = 820

10+ miles
n = 728

Q35 In a typical week, which of the following types of transportation do you use to get to / from work?
Q35a Of the travel options you just checked, which type do you use MOST OFTEN to get to / from work?
Q34 About how many miles is it from your home to your usual work location

One-third of Employed Respondents Regularly Used a Different Mode to Get Home from Work than They Used to Get to Work

11% used a different return mode three or more times per week



54% of Members Reported a Commute Change, but Change Was “Observed” for Only 44%

Some changes could have been temporary, but it’s likely some changes were for “access modes” rather than primary modes

2012
Reported
Changes

44% bicycle

13% walk

11% transit

8% TW

2% CP/VP

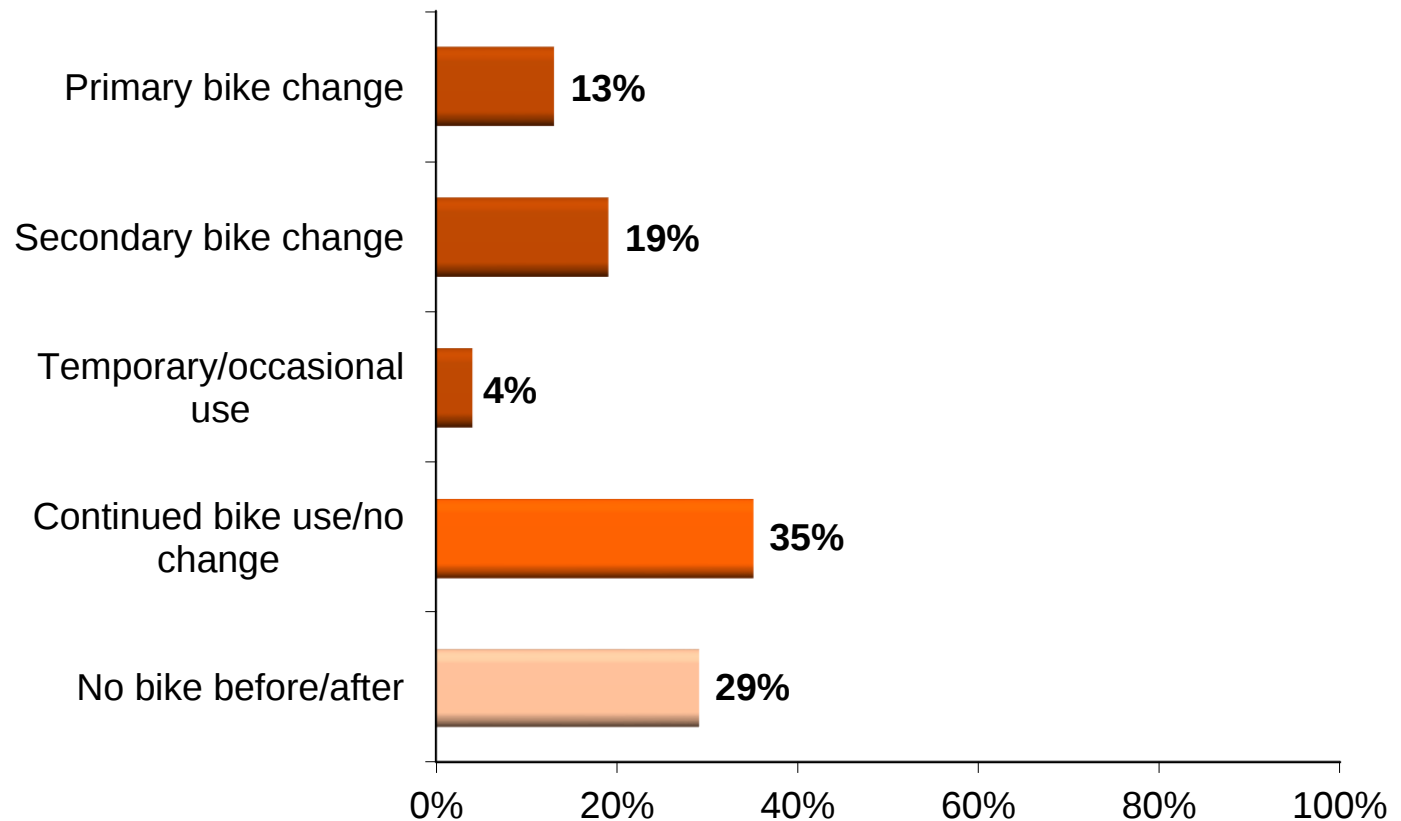
2012 Commute Changes	Reported Change	Observed Change
Change in commute	54%	44%
- Started bicycling / ride a bike more often	41%	32%
- Started walking / walk more often	11%	10%
- Started riding transit / ride transit more often	15%	12%
- Started teleworking / telework more often	6%	6%
- Started car/vanpooling / CP/VP more often	1%	1%

2014 Survey
n = 4,125

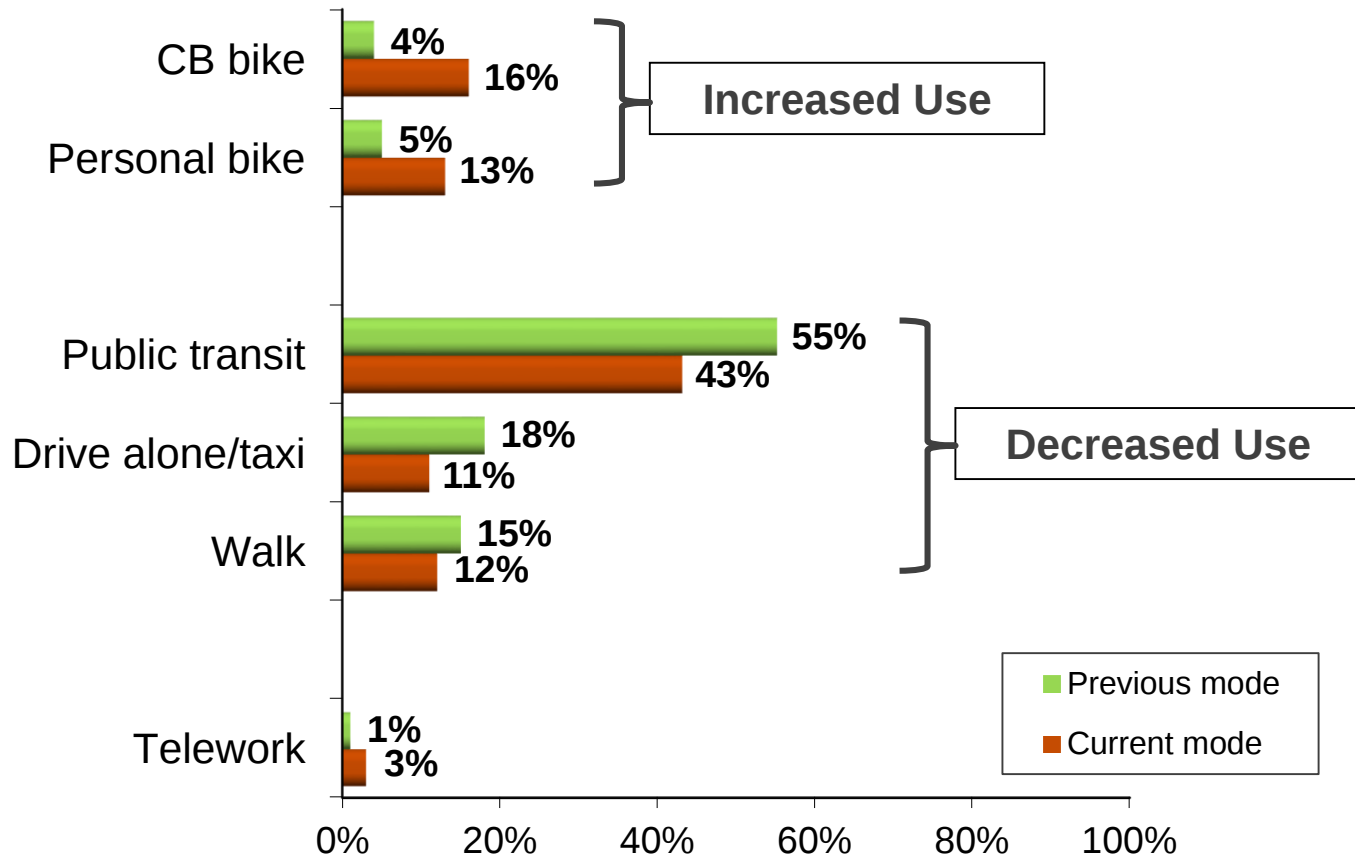
Q36 In the past year, did you make any of the following changes in how you travel TO OR FROM work?

More than One-third of Members Made a Commute Change to Bike

13% started using bike as their primary mode and 19% started or increase use of bike as a secondary or access mode



Comparison of Observed Mode Today vs One Year Ago Showed a Net Increase in Bike Commuting and Net Decreases in Transit, Drive alone /Taxi, and Walking



2014 Survey
n = 4,080

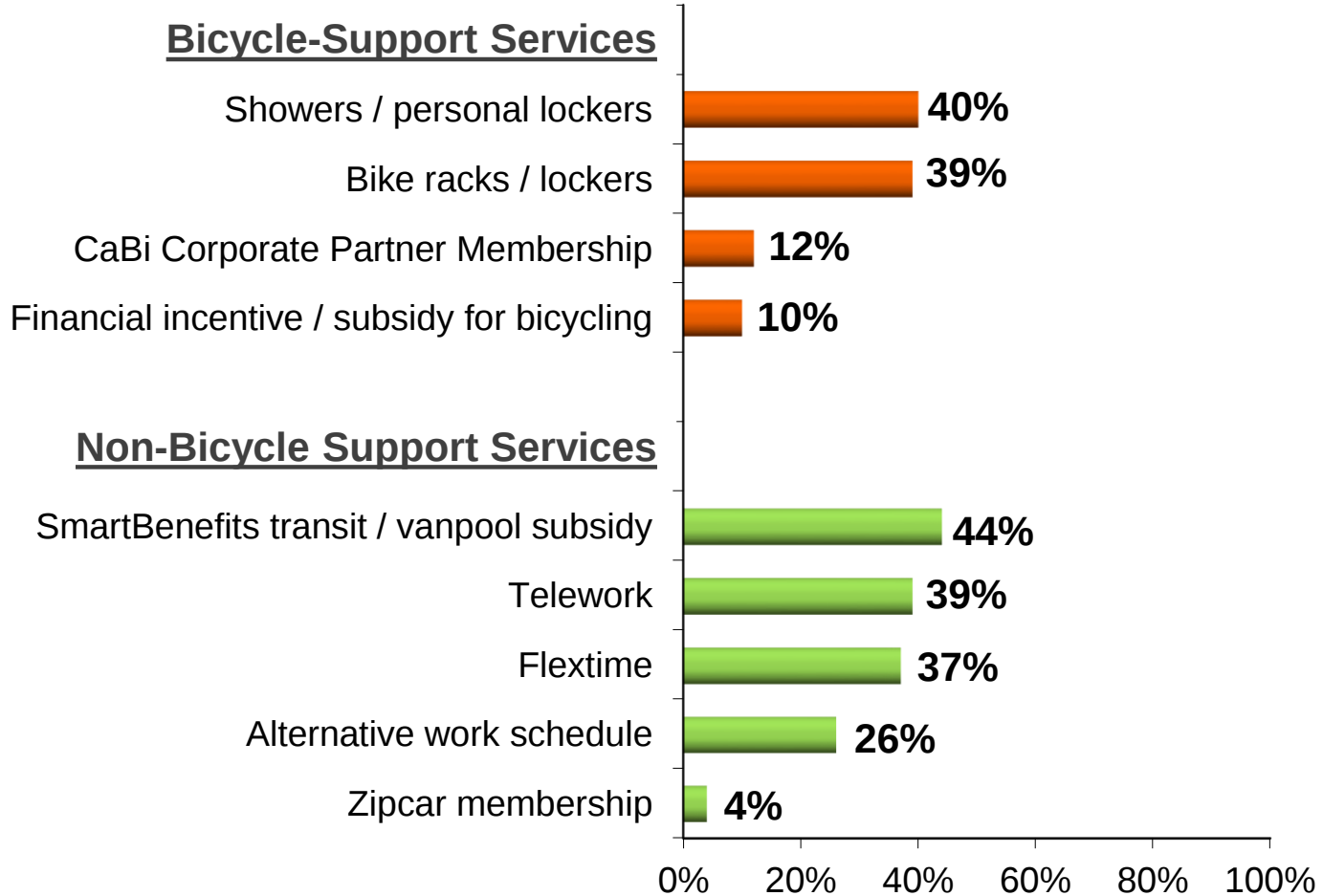
Note,
Carpool/vanpool
not shown; 2%
previous and 2%
current

Q35 In a typical week, which of the following types of transportation do you use to get to / from work?

Q35a Of the travel options you just checked, which type do you use MOST OFTEN to get to / from work?

Q37 Before you made this change, how many days in a typical week did you use each of the following types of transportation to get to work?

54% of Members said their Employers Offered Services to help them Bicycle to Work



CB Members were Twice as Likely to Have Bike Services as were Commuters Region-wide

Also more likely to have services than the average commuters in their work areas

Bike Services Available

	<u>CB</u>	<u>SOC</u>
<u>All members</u>	56%	27%
<u>Members who work in</u>		
▪ Alexandria	56%	22%
▪ Arlington	59%	35%
▪ District of Columbia	67%	40%
▪ Montgomery/Prince George's	49%	17%
▪ Other	43%	22%

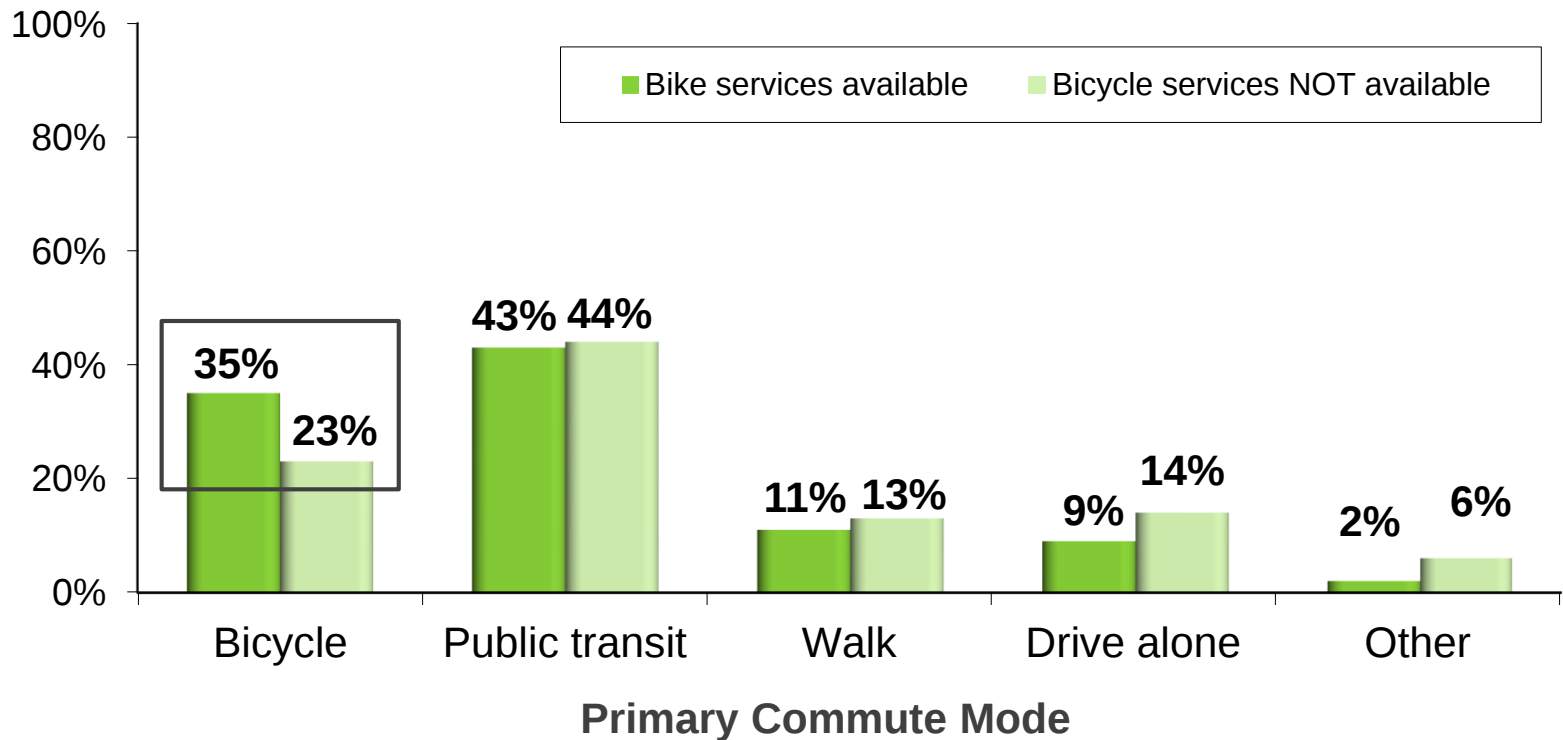
2014 CB Survey
n = 3,979

2013 SOC
n = 5,482

Q33a What is your Zip code at work?

Q41 Does your employer currently offer any of the following employee benefits to help with your trip to work?

CB Members who had Bike Services at Work Used Bike for Commuting More (35%) than did Members without Bike Services (23%)



2014 Survey

Bicycle services
available
n = 2,151

Bicycle services
not available
n = 1,783

Q35 In a typical week, which of the following types of transportation do you use to get to / from work?

Q35a Of the travel options you just checked, which type do you use MOST OFTEN to get to / from work?

Q41 Does your employer currently offer any of the following employee benefits to help with your trip to work?



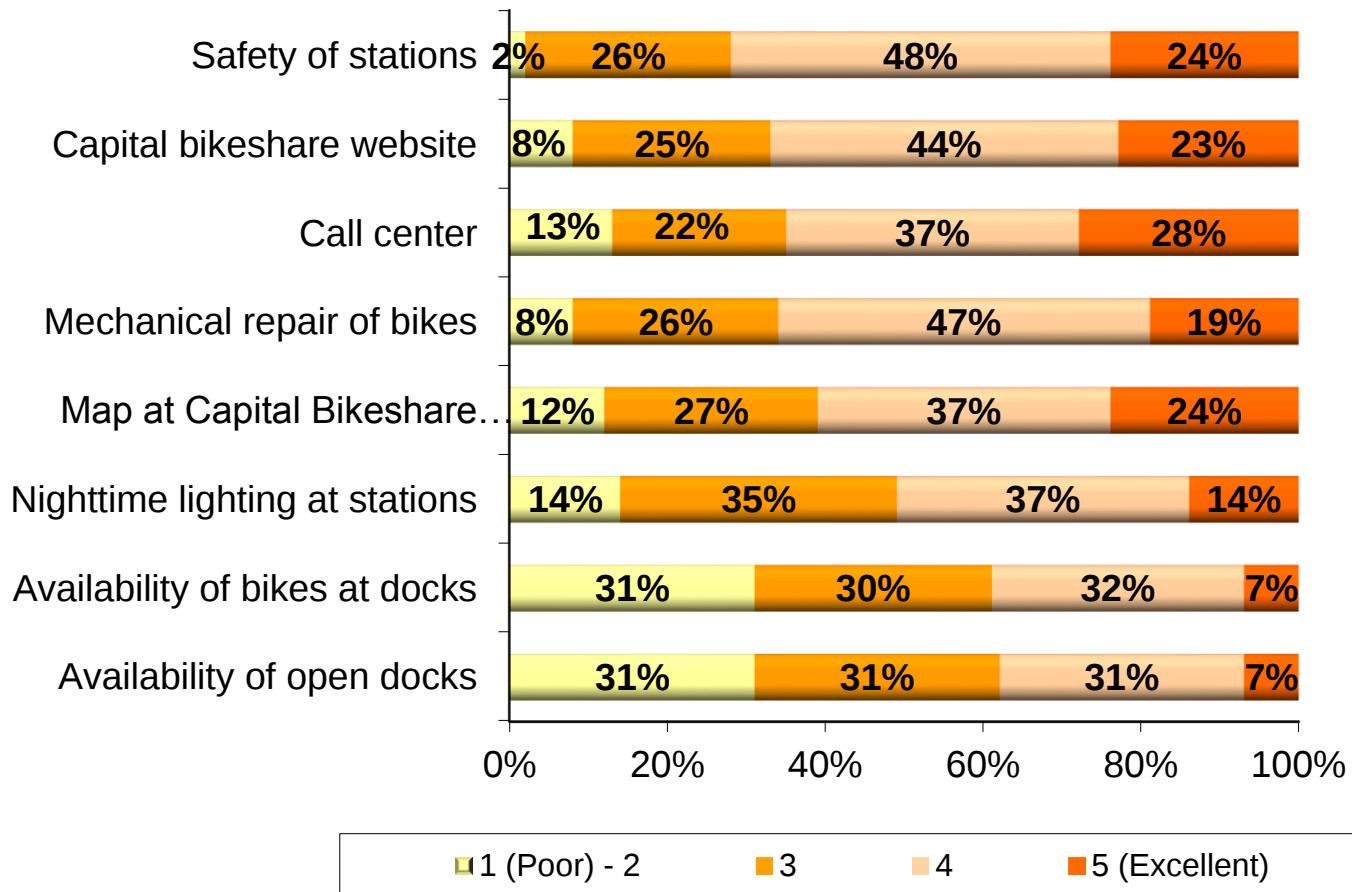
Use and Satisfaction with CB Features



Members Gave Generally High Marks to Most CB Features

At least six in ten respondents rated five features as a 4 or 5

Members who were female and those 45 years or older gave generally higher marks than did male and younger members



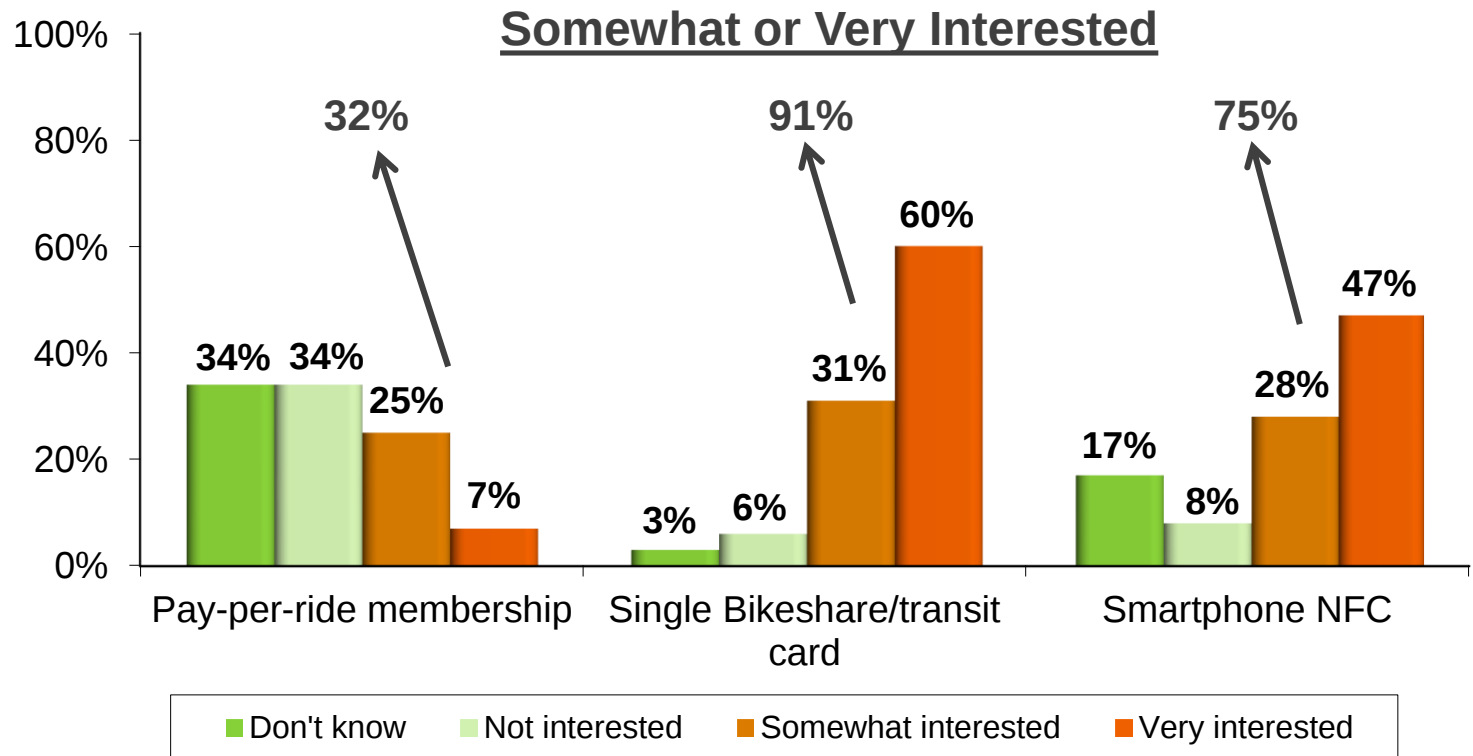
Call center
n = 2,151

Other features
n varies from
3,096 to 4,054

Q42 How do you rate each of the following features of Capital Bikeshare? Rating scale: 1 (Poor) to 5 (Excellent)

Nine in Ten Members were Interested in a Single Bikeshare/Transit Card Option

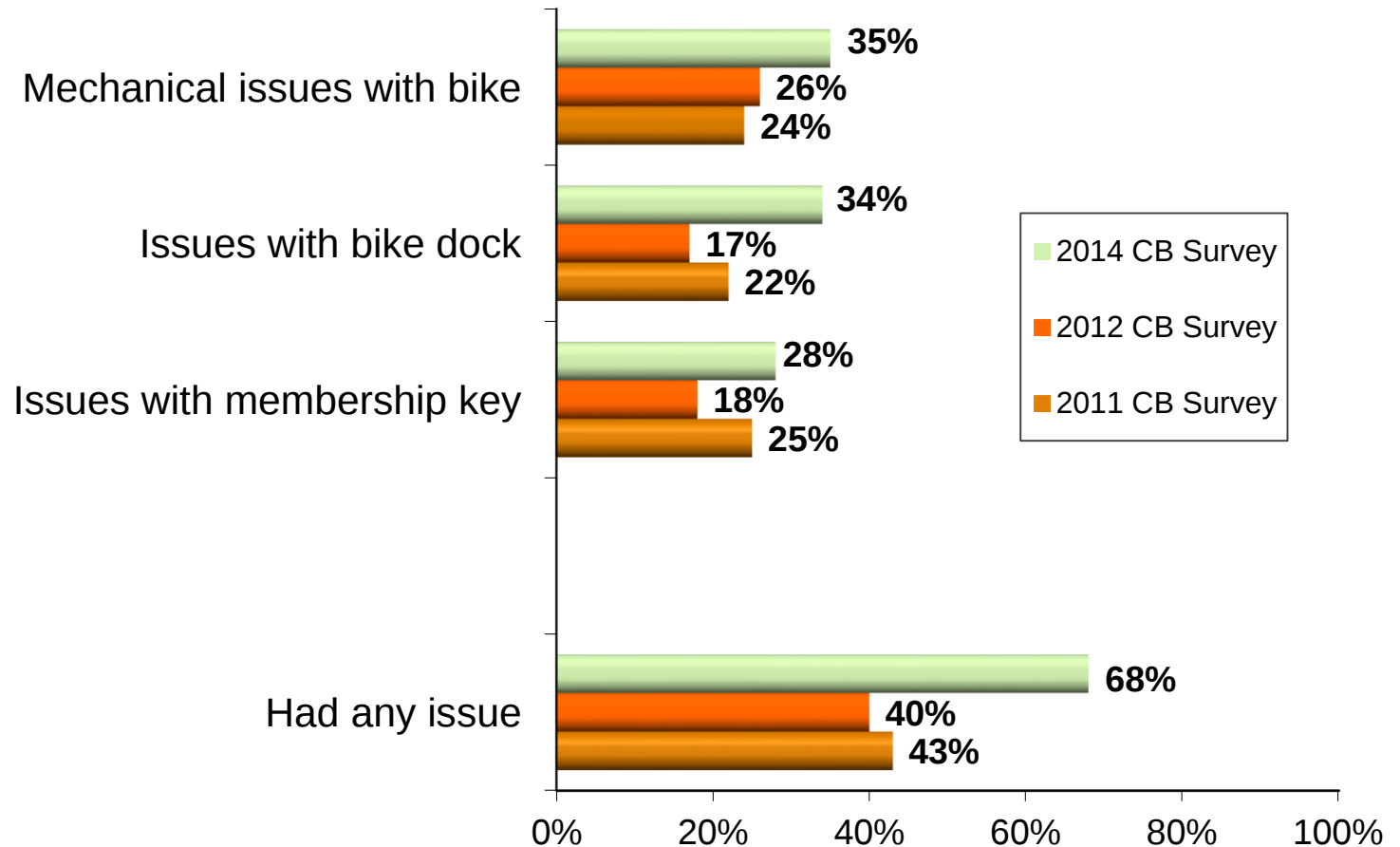
75% of Members would consider using near-field communication on a smartphone to check out CB bikes



- Q44 If Capital Bikeshare offered a low-cost pay per ride option with no membership fee required, how likely would you be to use it?
- Q45 If you could use a single card (e.g., Capital Bikeshare fob or SmarTrip card) to check out Capital Bikeshare bikes and ride public transit service, how interested would you be in using this single card system?
- Q46 If you have a smartphone equipped with near-field communication (NFC) functionality, how interested would you be in using it to check out Capital Bikeshare bikes?

About Two-thirds of Members had Encountered a Problem with a CB Service

Incidence of problems increased since 2012



2014 Survey
n = 4,118

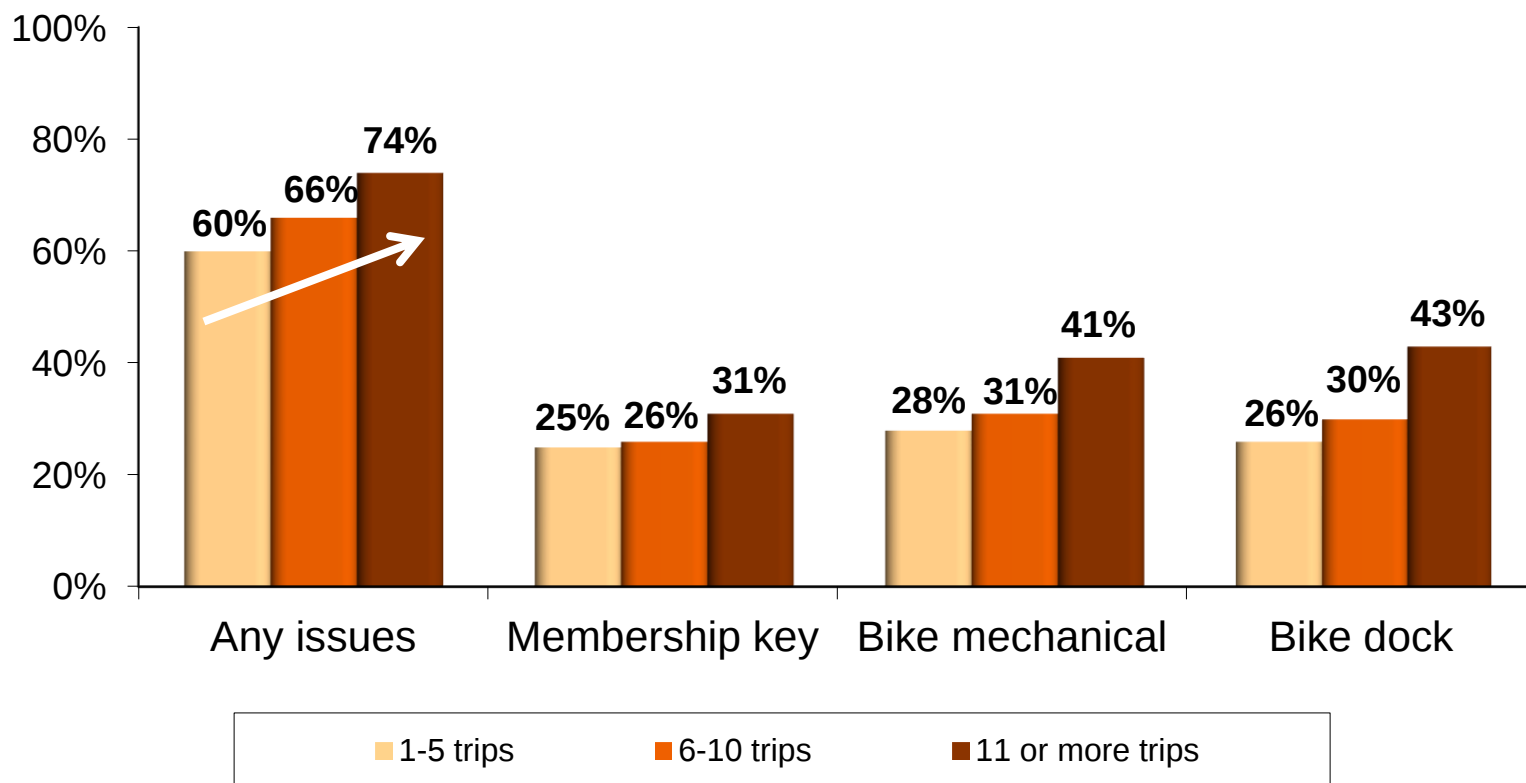
2012 Survey
n = 3,731

2011 Survey
n = 5,260

Q43 Have you had any problems with any of the following?

Frequent CB Users had Encountered More Problems than had Infrequent Riders

This is likely due to their greater exposure



2014 Survey

1-5 trips
n = 1,320

6-10 trips
n = 728

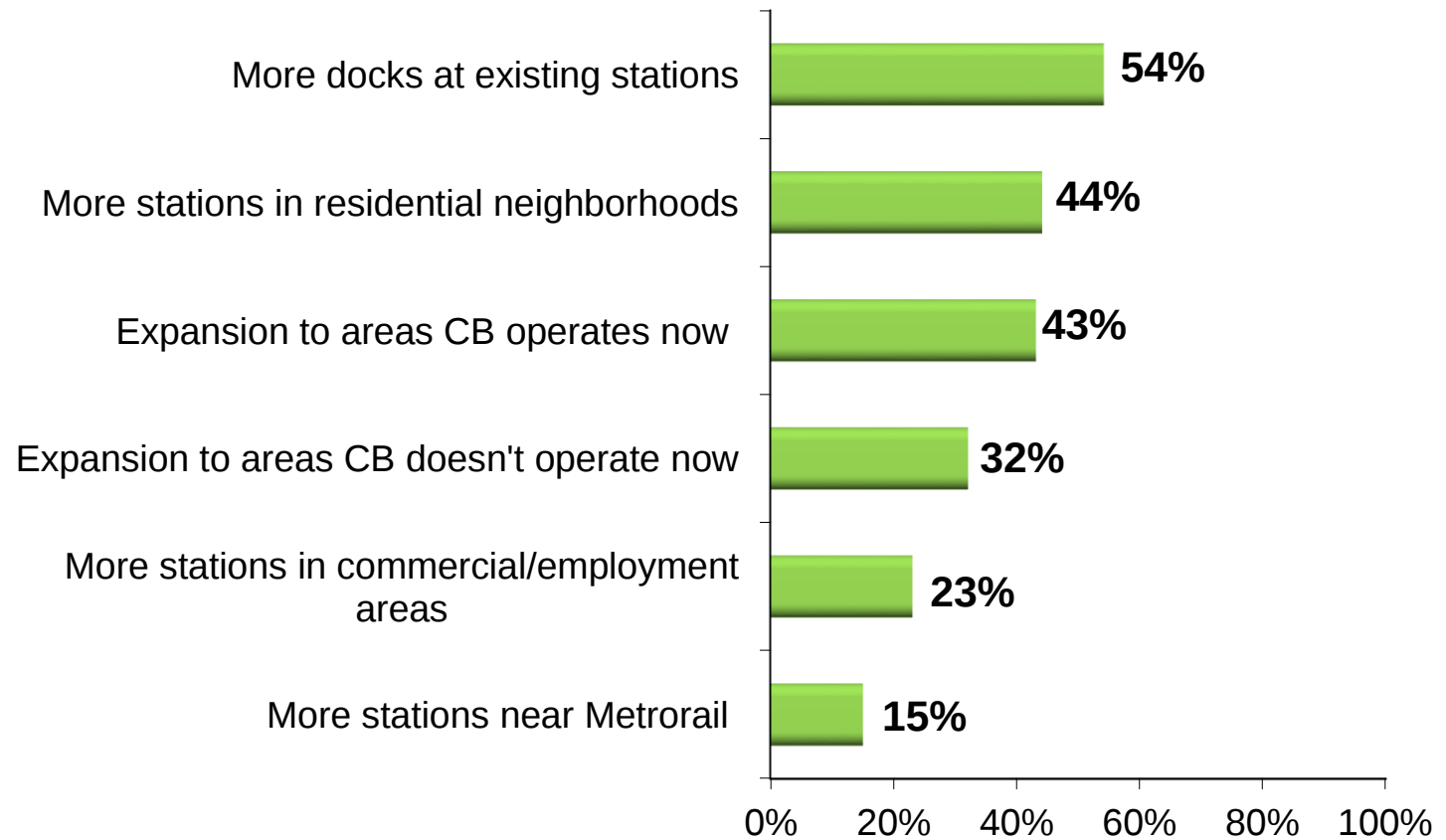
11+ trips
n = 1,563

Q43 Have you had any problems with any of the following?

Q8 In the past month, about how many Capital Bikeshare trips did you make?

Members want More Bikeshare Opportunities

The most requested CB expansions were more docks at existing stations and expansion to residential areas



DC Residents Preferred Infill / Expansion in Existing Areas; Members Outside DC Want Greater Coverage

Capital Bikeshare Expansion Options	Home Location		
	DC	Arlington	Other
More docks at existing stations	60%	24%	36%
Greater density / infill (existing areas)	48%	35%	27%
Residential neighborhoods	47%	56%	38%
Greater coverage (unserved areas)	26%	58%	53%
Commercial / employment areas	22%	21%	25%
Near Metrorail stations	12%	13%	25%

2014 Survey

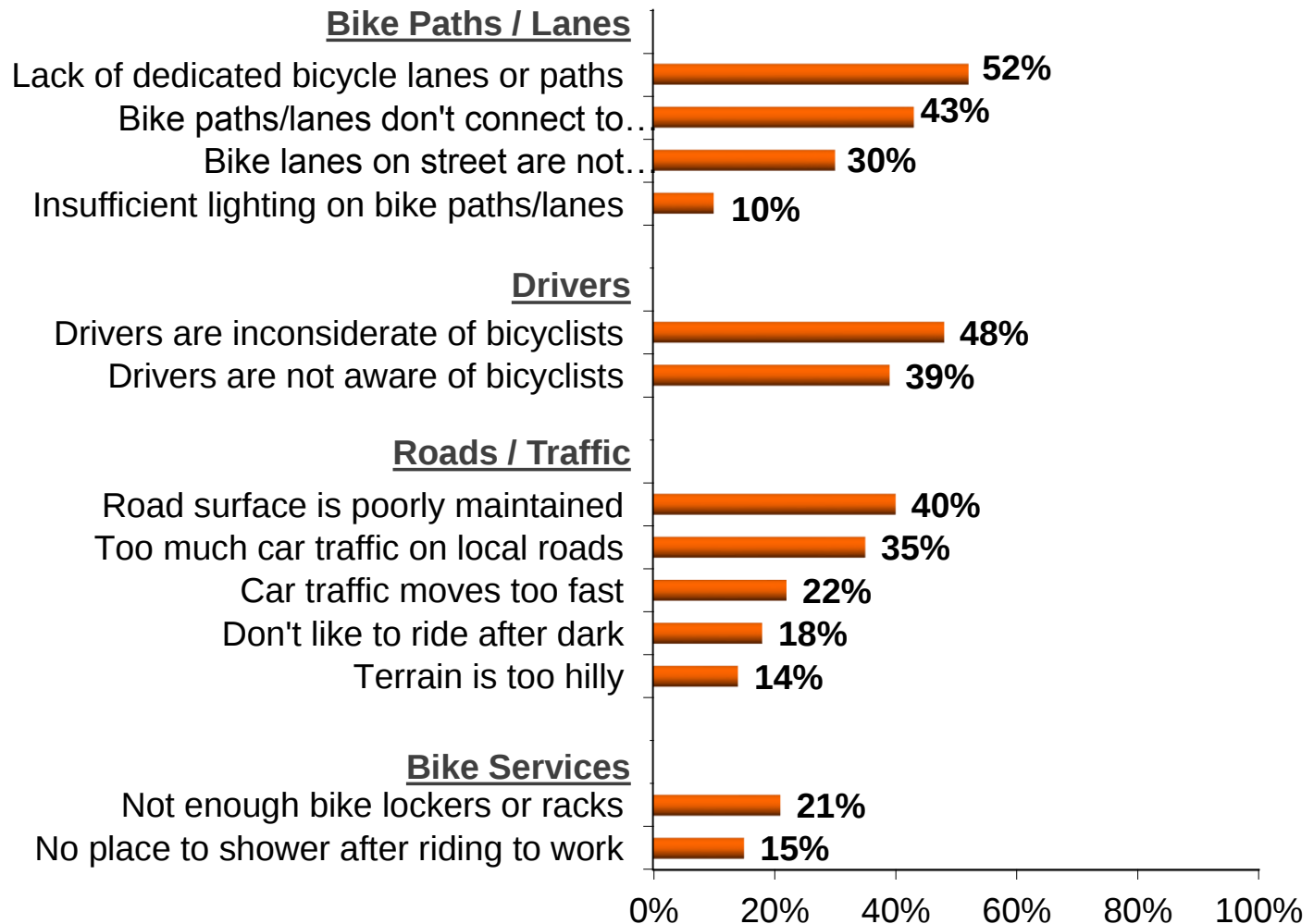
DC
n = 2,693

Arlington
n = 361

Other locations
n = 546

Q48 Which of the following Capital Bikeshare expansion options are most needed? (Multiple response permitted)

Members Cited Many Issues that are “Significant Barriers” to Bicycling in the DC Region



Infrequent CB Riders Primarily Reported Barriers Related to Safety of Riding;

Frequent CB Riders Cited Barriers Related to the Cycling Network, Cycling Comfort, and Bicycle Facilities

Barrier to Bicycling	Capital Bikeshare Trips in Past Month			
	0 Trips	1–5 trips	6–10 Trips	11+ Trips
Infrequent CB Rider Concerns				
Too much car traffic on local roads	39%	38%	33%	28%
Car traffic moves too fast	24%	24%	19%	18%
Lanes not separated from traffic	33%	28%	28%	28%
Don't like to ride after dark	25%	22%	15%	12%
Frequent CB Rider Concerns				
Lack of dedicated bike lanes	48%	45%	47%	53%
Paths / lanes don't connect	36%	39%	41%	43%
Road surface poorly maintained	27%	33%	39%	43%
Not enough bike lockers / racks	17%	17%	21%	23%

2014 Survey

CB trips made last month:

0 trips
n = 289

1-5 trips
n = 1,480

6-10 trips
n = 816

11 or more trips
n = 1,727

Q47 Which of the following are significant barriers to your bicycling in the Washington metro region?

Q8 In the past month, about how many Capital Bikeshare trips did you make?

Summary of Top Survey Findings



Joan M. Mas 2/2007

Top Findings – Motivations / Benefits

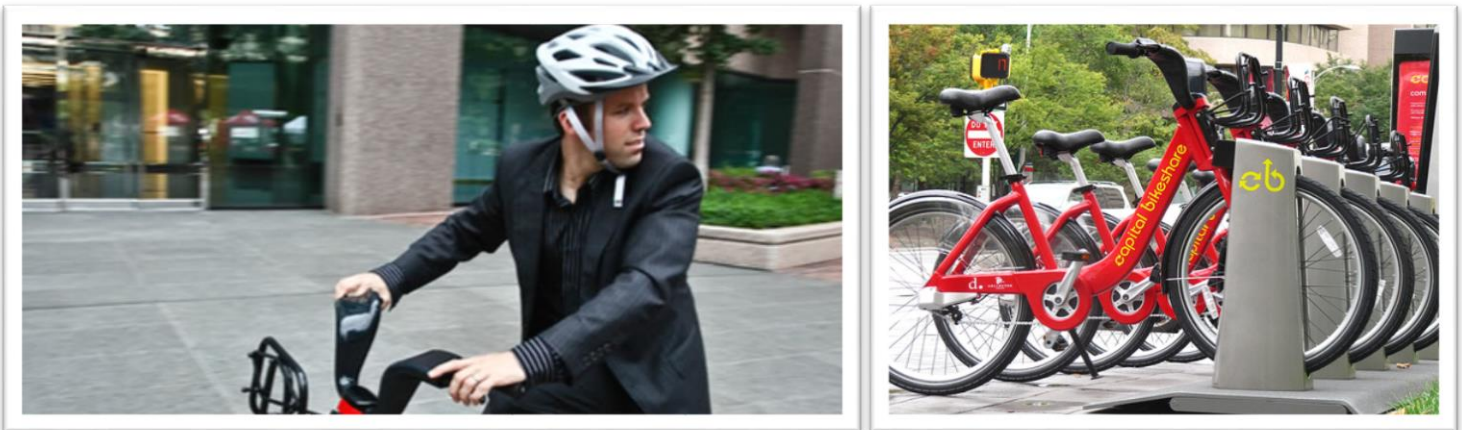


CB offers multiple benefits to appeal to a variety of user groups:

- Easier, faster travel; access to a wider range of destinations
- CB flexibility of bikeshare builds greater opportunities for one-way “best for the moment” travel choices
- Part of bikeshare’s appeal is that it’s a fun way to travel
- CB enables members to reduce the cost and hassle of car ownership and use – reduce personal travel costs
- Bikeshare offers exercise and health opportunities

Top Findings – Bikeshare Use

- Bikeshare use is distributed across frequency categories, showing interest for both frequent and occasional use
- 96% of members had used bikeshare trip for a non-work purpose and 74% made a bikeshare trip to/from work
- Half of “most recent” trips were to go to / from work
- CB is important as a transit access mode – nearly two-thirds of members used CB to access transit in the past month



Top Findings – Accessibility

- **49%** of members made “induced” trips – trips they would not have made if Capital Bikeshare had not been available:
 - Expands range of destinations for car-free members
 - Allows car owners to travel easily and conveniently without their cars to congested / parking-limited areas
- CB makes establishments more attractive;
82% of members said they were more likely to patronize a bikeshare-accessible business establishment
- Respondents who reported higher value of accessibility made more induced trips and more bikeshare trips



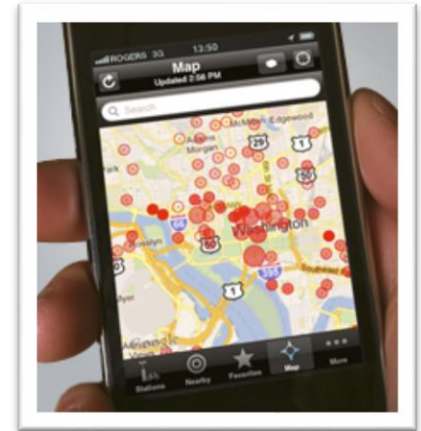
Top Findings – Travel Changes



- **84%** of members increased their bike use since joining
- Bikeshare members have shifted some trips to bicycle from other modes – 55% reduced car use, 59% reduced taxi use, 58% ride Metrorail less often
- **24%** of members reduced driving miles; 5% sold a HH car
- **44%** increased use of non-drive alone modes for commuting – 35% increased use of biking for commuting
- Members reduced **4.4 million** annual driving miles since joining CB

Top Findings – Member Satisfaction

- Bikeshare members save an average of **\$710** per year on personal travel cost; These savings pay for the \$75 membership fee within 2 months
- Collectively, CB members save almost **\$20 million** each year in travel costs
- CB users generally were satisfied with the quality of services. Lowest satisfaction was with availability of bikes at docks and open docks
- Desirable CB expansion appears to be more docks at existing stations and expansion to residential neighborhoods





Questions?

Contact:

Lori Diggins

LDA Consulting

202-548-0205

LDACWDC@aol.com