Research Report

ACCS 2011 BikeArlington Study

October 2011
Study Goals and Objectives
Study Goals and Objectives

• Gauge awareness and satisfaction of BikeArlington and its individual services

• Understand where bikers are getting their information about biking in Arlington County

• Understand the impact that BikeArlington has had among those biking in Arlington County

• Investigate the potential for new services

• Make comparisons, where possible, to the 2008 BikeArlington study
Methodology
Methodology

There were two main approaches for gathering respondents for this study: trail intercepts and the online survey.

Trail intercepts – Bikers were approached on biking and walking trails and asked if they would be willing to participate in a very brief survey. After completing the intercept survey, respondents were asked if they would be willing to participate in a follow-up online survey.
  - Trail intercepts were conducted on Wednesday, July 6 and Saturday, July 9.

Online survey – The online survey was used for both those who participated in the intercept survey and those whose email addresses BikeArlington had on file. Additionally, online banner ads for the survey were placed on Arlington County websites to drive people to the online survey.
  - The online survey was available from June 21 to July 30.

There were 868 respondents, making the margin of error +/- 3.32%.
Nearly Six in Ten Were Driven to the Survey by an Email from SIR

Q56a. From which of the following sources did you learn about this survey?

- Email from SIR Research: 59%
- Trail intercept with SIR Research: 13%
- BikeArlington: 8%
- ARLnow.com: 6%
- Other Arlington Transportation website: 3%
- Arlington County website: 3%
- Arlington County Commuter Services: 2%
- Google: 1%
- Other: 8%
- Not sure: 7%

n = 850
The respondent profiles for the 2008 wave and the 2011 wave of the study are very different. Making any comparisons between the two waves is risky and any such conclusions should be considered directional only.
Respondent Profile
# Demographic Profile

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arlington resident</td>
<td>63%</td>
</tr>
<tr>
<td>Employed full-time</td>
<td>88%</td>
</tr>
<tr>
<td>Work in Arlington</td>
<td>35%</td>
</tr>
<tr>
<td>Primary mode of transportation to work</td>
<td></td>
</tr>
<tr>
<td>Drive alone</td>
<td>25%</td>
</tr>
<tr>
<td>Bike</td>
<td>46%</td>
</tr>
<tr>
<td>Mean Age</td>
<td>43</td>
</tr>
<tr>
<td>Caucasian</td>
<td>80%</td>
</tr>
<tr>
<td>Mean income</td>
<td>$108K</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>64%</td>
</tr>
<tr>
<td>Female</td>
<td>32%</td>
</tr>
</tbody>
</table>
## Demographic Profile Comparison

<table>
<thead>
<tr>
<th>Demographic</th>
<th>2008</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arlington resident</td>
<td>64%</td>
<td>63%</td>
</tr>
<tr>
<td>Employed full-time</td>
<td>93%</td>
<td>88%</td>
</tr>
<tr>
<td>Primary mode of transportation to work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drive alone</td>
<td>18%</td>
<td>25%</td>
</tr>
<tr>
<td>Bike</td>
<td>39%</td>
<td>46%</td>
</tr>
<tr>
<td>Mean Age</td>
<td>42</td>
<td>43</td>
</tr>
<tr>
<td>Caucasian</td>
<td>81%</td>
<td>80%</td>
</tr>
<tr>
<td>Mean income</td>
<td>107k</td>
<td>108k</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>Female</td>
<td>31%</td>
<td>32%</td>
</tr>
</tbody>
</table>
The Majority of Respondents Are Employed Full-time

- Employed full-time: 88%
- Employed part-time: 5%
- Not employed: 7%

Q1. Are you currently employed outside your home, either part-time or full-time?

n = 868
About Two-Thirds Live in Arlington County

Of Those Who Live in the County, Nearly Half Have Lived There for More Than 10 Years

- Less than 2 years: 15%
- 2-5 years: 25%
- 6-10 years: 16%
- More than 10 years: 44%
- Arlington resident: 63%
- Non-resident: 37%

Q43. What is your home zip code?
Q44. How long have you lived in the county?
Nearly One-Third Work in Arlington County

Works in Arlington: 35%
Does not work in Arlington: 65%

Q48. What is your work zip code?
n = 803

Southeastern Institute of Research
Half of Respondents Live Seven or More Miles Away from Their Work

The Mean Distance from Work Is Eight Miles

- Less than 1 mile: 4%
- 1 to 3 miles: 19%
- 4 to 6 miles: 30%
- 7 to 9 miles: 20%
- 10 or more miles: 30%

n = 786

Q49. About how far is it from your home or work?
More Than Three-Fourths Live Within Five Blocks of a Bus Stop or Train Station

- 1-2 blocks: 54%
- 3-5 blocks: 23%
- 6-10 blocks: 12%
- More than 10 blocks: 9%
- Don't know: 0%
- Other: 2%

Q50. How far from your home is the nearest bus stop or train station?

n = 864
The Mean Age for Respondents is 43

- Millennials: 14%
- Generation X: 47%
- Baby Boomers: 35%
- Silent/GI: 3%

Q51. In what year were you born?

n = 841
Eight in Ten Respondents Are Caucasian

Nearly all (97%) speak English at home. One percent speak Spanish and 3% speak another language.

Q52. Which of the following best describes your racial background?

- White, non-Hispanic: 80%
- Asian: 4%
- Hispanic/Latino: 3%
- African American/Black: 1%
- American Indian/Alaska Native: 0%
- Native Hawaiian/Other Pacific Islander: 0%
- Other: 3%
- Prefer not to answer: 8%

Q53. What is the primary language spoken in your household?

n = 868

Southeastern Institute of Research
The Mean Income Is $108,000

<table>
<thead>
<tr>
<th>Income Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $30,000</td>
<td>1%</td>
</tr>
<tr>
<td>$30,000-$59,999</td>
<td>11%</td>
</tr>
<tr>
<td>$60,000-$99,999</td>
<td>16%</td>
</tr>
<tr>
<td>$100,000-$120,000</td>
<td>14%</td>
</tr>
<tr>
<td>More than $120,000</td>
<td>38%</td>
</tr>
<tr>
<td>Don't know</td>
<td>1%</td>
</tr>
<tr>
<td>Prefer not to answer</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q55. Which category best represents your household’s total annual income? 

n = 867
Nearly Two-Thirds of Respondents Are Male

- Male: 64%
- Female: 32%
- Prefer not to answer: 4%

Q56. Are you:

n = 868
Most respondents bike at least a couple times a week and most bike on multi-use trails most often. Exercise and recreation make up a large number of biking trips and are large motivators for biking. Millennials tend to have slightly different motivations for biking, primarily to save money and as an efficient means of transportation.
More Than Eight in Ten Respondents Bike at Least a Couple of Times a Week

- Daily: 42%
- A couple of times a week: 41%
- Once a week: 6%
- At least once a month, but not weekly: 7%
- Less than once a month: 3%

Males are significantly more likely than females to bike daily.

Q2. How often do you bike for any purpose?

n = 868
Respondents in 2011 Bike About as Frequently as They Did in 2008

How often do you bike for any purpose?

- Less than once a month/Seldom
- At least once a month, but not weekly
- Once a week
- A couple of times a week
- Daily

<table>
<thead>
<tr>
<th>Frequency</th>
<th>2008</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than once a month/Seldom</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>At least once a month, but not weekly</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Once a week</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>A couple of times a week</td>
<td>44%</td>
<td>41%</td>
</tr>
<tr>
<td>Daily</td>
<td>38%</td>
<td>42%</td>
</tr>
</tbody>
</table>
Nearly Three-Fourths Say They Bike on Multi-use Trails Most Often

<table>
<thead>
<tr>
<th>Multi-use trails</th>
<th>Arlington Residents</th>
<th>Non Arlington Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarendon</td>
<td>27%</td>
<td>49%</td>
</tr>
<tr>
<td>Rosslyn</td>
<td>49%</td>
<td>47%</td>
</tr>
<tr>
<td>Ballston</td>
<td>37%</td>
<td>49%</td>
</tr>
<tr>
<td>Court House</td>
<td>26%</td>
<td>42%</td>
</tr>
<tr>
<td>Virginia Square</td>
<td>10%</td>
<td>29%</td>
</tr>
<tr>
<td>East Falls Church</td>
<td>27%</td>
<td>40%</td>
</tr>
<tr>
<td>Shirlington</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Crystal City/National Airport</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td>North Arlington</td>
<td>15%</td>
<td>23%</td>
</tr>
<tr>
<td>South Arlington</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Columbia Pike</td>
<td>7%</td>
<td>18%</td>
</tr>
<tr>
<td>Pentagon/Pentagon City</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>West Arlington</td>
<td>8%</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Note: Values do not add to 100%. Respondents were able to choose more than one response.

Q6. In what Arlington area(s) or location(s) do you bike most often?

Arlington = 564
Non-Arlington = 304

Southeastern Institute of Research
More Than One-Third Say the Weather or Their Busy Schedule Keep Them from Biking More Often

Q3. What factors prevent you from biking?

- Busy schedule: 38%
- Heat/weather: 35%
- Doesn't fit with my commute: 19%
- Car traffic: 17%
- Family/other hobbies: 13%
- Bike Access (do not own a good bike, …): 7%
- Laziness: 4%
- Other: 12%
- Nothing in particular: 1%

Note: Question was only asked of those who bike once a week or less.

n = 142
Exercise and Recreation Are the Main Types of Biking Trips Taken
Many Also Bike as Part of or All of Their Commute

Q4. For what types of trips do you typically bike?

- Exercise or recreation: 89%
- To get to and from work: 65%
- To run errands: 51%
- For social activities: 37%
- To visit friends or family: 26%
- As part of my commute to and from work: 21%
- To go to lunch during the work day: 9%
- To attend business meetings: 9%
- Other: 6%

Note: Values do not add to 100%. Respondents were able to choose more than one response.

n = 868

Southeastern Institute of Research
Respondents Are Taking Similar Types of Trips in 2011 as in 2008

For what types of trips do you typically bike?
Exercise Is the Main Motivation for Biking

- Exercise: 94%
- Enjoyment/Recreation: 89%
- Health: 80%
- Help the environment: 64%
- Save money: 55%
- Faster than driving: 39%
- No access to other transportation: 4%
- Other: 9%

Note: Values do not add to 100%. Respondents were able to choose more than one response.

Younger and lower income respondents are significantly more likely to say saving money is their motivation for biking.

Q5. For those trips that you choose to bike, what is your motivation to bike?

n = 868
Millennials Are More Likely to Bike to Save Money, Get to Their Destination Faster and Because They Have No Access to Other Transportation

Note: Values do not add to 100%. Respondents were able to choose more than one response.

Q5. For those trips that you choose to bike, what is your motivation to bike?
Implication

In general, messaging should highlight exercise and recreation benefits. Messaging directed at younger bikers, however, should also highlight cost savings and efficiency.
Three-quarters of respondents report biking to work at least some of the time. Mean travel time is 39 minutes and mean travel distance is eight miles.
Recall, Three-Quarters Bike for Part or All of Their Commute to and from Work at Least Sometimes

Q4. For what types of trips do you typically bike?

- Exercise or recreation: 89%
- To get to and from work: 65%
- To run errands: 51%
- For social activities: 37%
- To visit friends or family: 26%
- As part of my commute to and from work: 21%
- To go to lunch during the work day: 9%
- To attend business meetings: 9%
- Other: 6%

Note: Values do not add to 100%. Respondents were able to choose more than one response.

n = 868

Southeastern Institute of Research
More Than Two-Thirds of Employed Respondents Bike to Work at Least Once a Week

Q10. How often do you bike to work?

- Daily: 35%
- A couple times a week: 27%
- Once a week: 6%
- At least once a month, but not weekly: 8%
- Less than once a month: 7%
- Never: 17%

Note: Question was only asked of those who are currently employed.

n = 803
Nearly Two-Thirds Commute Entirely by Bike

Q13. What percentage of your total commute time is spent biking?

n = 666
And Nearly Half Report That the Longest Part of Their Trip to/from Work Is Typically Made on Bicycle

Q45. What type of transportation do you use to get to/from work most days in a typical week? (Please check only one. If you use more than one type on a particular day, count the one you use for the longest distance part of your trip.)

n = 722
Nearly Half Use Other Modes of Transportation at Least Once a Week

Q46. How often do you typically use any other type of transportation to get to work, other than the one you just indicated?

n = 801

Don't know 1%
Other 1%
Never 8%
A few times a year 14%
Once per month 8%
A few times per month 24%
One day a week 12%
Two days per week 20%
More often than two days per week 12%

44%
Over Half of Respondents Bike Seven or More Miles One Way to Work

The Mean Distance for Biking to Work Is Eight Miles

- Less than 1 mile: 1%
- 1 to 3 miles: 20%
- 4 to 6 miles: 28%
- 7 to 9 miles: 23%
- 10 or more miles: 28%

Q11. How long is your typical one way bike to work from work?

n = 665
Half of Respondents Travel Between 21 and 45 Minutes by Bike to Get to Work

The Mean Travel Time is 39 Minutes

Q12. How much time does the biking part of your entire commute take?

n = 668
Implication

Encourage bikers to bike to work more frequently. Many of them are trying it but not all are doing it on a regular basis.
Nearly three-quarters of respondents report that their employer offers assistance, information or facilities to encourage biking to work. Showers at the workplace motivate many to bike.
Nearly Three-Fourths Report That Their Employers Offer Assistance, Information or Facilities to Encourage Biking to Work

Q14. Does your employer or your building offer any facilities, information or assistance to encourage biking to work?

- Yes: 74%
- No: 22%
- Don't know: 4%

n = 666
Respondents Whose Employers Offer Biking Assistance Bike About as Often as Those Whose Employers Do Not Offer Assistance

- **Daily**: 44% (Employer encourages biking) vs. 41% (Employer does not encourage biking)
- **A couple times a week**: 32% vs. 35%
- **Once a week**: 7% vs. 5%
- **At least once a month, but not weekly**: 8% vs. 11%
- **Less than once a month**: 8% vs. 8%

**Frequency of biking to work by employer assistance.**

n = 666

Southeastern Institute of Research
Employers Most Often Provide Assistance to Bikers in the Form of Showers and Protected Bike Racks

<table>
<thead>
<tr>
<th>Facility</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Showers for use after biking to work</td>
<td>70%</td>
</tr>
<tr>
<td>Bike racks protected from the weather</td>
<td>66%</td>
</tr>
<tr>
<td>Connection to bike lanes</td>
<td>54%</td>
</tr>
<tr>
<td>Unsheltered bike racks</td>
<td>40%</td>
</tr>
<tr>
<td>Connection to bike trails</td>
<td>37%</td>
</tr>
<tr>
<td>Enclosed bike lockers</td>
<td>30%</td>
</tr>
<tr>
<td>Personal storage lockers for overnight</td>
<td>30%</td>
</tr>
</tbody>
</table>

Q17. Following is a list of biking facilities that might be available at your workplace. In the first column, check all the facilities that are available. For those that are not available, please indicate if you would like to have the facility.

n = 663
Of Respondents Who Do Not Have These Services at Work Currently, 87% Say They Would Like Showers and 83% Would Like Connections to Bike Lanes

<table>
<thead>
<tr>
<th>Facility</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Showers for use after biking to work</td>
<td>87%</td>
</tr>
<tr>
<td>Connection to bike lanes</td>
<td>83%</td>
</tr>
<tr>
<td>Connection to bike trails</td>
<td>74%</td>
</tr>
<tr>
<td>Bike racks protected from the weather</td>
<td>71%</td>
</tr>
<tr>
<td>Personal storage lockers for overnight</td>
<td>60%</td>
</tr>
<tr>
<td>Enclosed bike lockers</td>
<td>56%</td>
</tr>
<tr>
<td>Unsheltered bike racks</td>
<td>15%</td>
</tr>
</tbody>
</table>

Note: Graph represents the percentage of respondents who would like to have the facility at their workplace among those who currently do not have it.

Q17. Following is a list of biking facilities that might be available at your workplace. In the first column, check all the facilities that are available. For those that are not available, please indicate if you would like to have the facility.
Showers Have Influenced More Than Half of Those Who Currently Bike to Work to Make That Decision

Q18. Which of these facilities influenced your decision to bike to work?

- Showers for use after biking to work: 56%
- Bike racks protected from the weather: 34%
- Connection to bike lanes: 28%
- Connection to bike trails: 21%
- Enclosed bike lockers: 18%
- Personal storage lockers for overnight: 14%
- Unsheltered bike racks: 3%
- None of the above: 22%

n = 632
Note: Enclosed bike lockers were not included in the 2008 survey.

Connection to Bike Lanes is More Influential in 2011

Which of these facilities influenced your decision to bike to work?
When working with employers, encourage them to offer shower facilities to their employees. Doing so will greatly encourage the usage of biking as a means to get to work.
About half of respondents would consider biking to a Metro Station and taking the Metro to work. Respondents would be most likely to use bike trail/lane connections and bike racks protected from the weather.
About Half of Respondents Would Consider Biking to a Metro Station and Taking the Metro to Work

Q19. Would you consider riding your bike to a metro station, parking your bike, and riding the Metro to work?

Yes: 47%
No: 46%
Don't know: 7%

n = 666

Note: Distance away from the Metro did not affect respondent interest in biking to the Metro station and then taking the Metro to work.
Q20. Which of the following facilities would you use at a Metro station?

- Connection to bike trails: 15% 72% 87%
- Connection to bike lanes: 16% 67% 83%
- Bike racks protected from the weather: 16% 58% 74%
- Enclosed bike lockers: 19% 27% 46%
- Unsheltered bike racks: 17% 22% 39%
- Showers for use after biking to work: 12% 20% 32%
- Personal storage lockers for overnight use: 13% 17% 30%

n = 517
Half of Respondents are Willing to Pay Between $3.50/Day and $5.00/Day to Use an Enclosed Bike Locker at a Metro Station

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Payment Frequency</th>
<th>Mean</th>
<th>Mode</th>
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</thead>
<tbody>
<tr>
<td>5%</td>
<td>Per Hour</td>
<td>$0.90</td>
<td>$1.00</td>
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<tr>
<td>50%</td>
<td>Per Day</td>
<td>$3.50</td>
<td>$5.00</td>
</tr>
<tr>
<td>2%</td>
<td>Per Week</td>
<td>$8.75</td>
<td>$5.00</td>
</tr>
<tr>
<td>29%</td>
<td>Per Month</td>
<td>$27.79</td>
<td>$25.00</td>
</tr>
<tr>
<td>15%</td>
<td>Per Year</td>
<td>$90.00</td>
<td>$100.00</td>
</tr>
</tbody>
</table>

n = 216

Respondents prefer to pay a daily fee regardless of how frequently they bike to work.
Implication

Encourage workers to bike to Metro stations and take the Metro to work—particularly those who live near Metro stations that are easily accessible by bike trails and lanes. The availability of bike lockers, with multiple pricing options, will further encourage this behavior.
The largest safety concern for cyclists is sharing the way with vehicles, both day and night. Women are more likely than men to feel unsafe at all times of day and from all types of dangerous situations. More than half of respondents specifically noted aggressive or inattentive drivers as a safety concern in verbatim comments.
Respondents Generally Feel Safe Biking in the Day

The Most Concern About Safety in the Day Is Sharing the Way with Vehicles

Q7. How safe you feel in regards to each of the following when you bike during the day?

- **Sharing the way with vehicles**
  - Safe: 39%
  - Unsafe: 50%

- **Navigating hazards**
  - Safe: 15%
  - Unsafe: 70%

- **Crime**
  - Safe: 3%
  - Unsafe: 91%

n = 868

Southeastern Institute of Research
Women are significantly more likely to feel unsafe during the day than men.

- **Sharing the way with vehicles**
  - Women: 47%
  - Men: 33%

- **Navigating hazards**
  - Women: 21%
  - Men: 12%

- **Crime**
  - Women: 2%
  - Men: 5%

**Note:** Percentages indicate those reporting they feel unsafe.

Q7. How safe you feel in regards to each of the following when you bike during the day?
Concerns About Safety Intensify Slightly When Biking at Night

Q8. How safe do you feel in regard to each of the following when you bike during the evening or at night?

- Sharing the way with vehicles
  - Safe: 56%
  - Unsafe: 30%
- Navigating hazards
  - Safe: 36%
  - Unsafe: 43%
- Crime
  - Safe: 17%
  - Unsafe: 64%

n = 868

Southeastern Institute of Research
Women are Significantly More Likely to Feel Unsafe at Night than Men

Q8. How safe do you feel in regard to each of the following when you bike during the evening or at night?

- **Sharing the way with vehicles**
  - Women: 60%
  - Men: 47%

- **Navigating Hazards**
  - Women: 46%
  - Men: 28%

- **Crime**
  - Women: 29%
  - Men: 9%

Note: Percentages indicate those reporting they feel unsafe.
More than Half Say Encounters with Aggressive or Inattentive Drivers are a Safety Issue when Biking

<table>
<thead>
<tr>
<th>Safety Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aggressive or inattentive drivers</td>
<td>55%</td>
</tr>
<tr>
<td>Pedestrians and other trail users</td>
<td>30%</td>
</tr>
<tr>
<td>Road/trail conditions</td>
<td>27%</td>
</tr>
<tr>
<td>Limited bike lanes</td>
<td>12%</td>
</tr>
<tr>
<td>Traffic/bad intersections</td>
<td>12%</td>
</tr>
<tr>
<td>Buses or cars in bike lanes</td>
<td>10%</td>
</tr>
<tr>
<td>Car doors</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
</tr>
<tr>
<td>Nothing in particular</td>
<td>3%</td>
</tr>
</tbody>
</table>

Note: Values do not add to 100%. Respondents were able to choose more than one response.

Q9. What safety issues, if any, do you encounter when biking?

n = 751
Implication

Continue to encourage drivers and cyclists to share the road and educate them on ways to do so.
Three-fourths of bikers have noticed sharrows, but fewer are certain of an increase in safety for bikers due to the sharrows.
About Three-Fourths Have Noticed the Sharrows in Arlington

Q31. Have you noticed any sharrows in Arlington?

- Yes: 76%
- No: 18%
- Don't know: 6%

n = 868
Four in Ten Say Sharrows Make Streets Safer for Bicyclists

Q32. To what extent are sharrows making the streets safer for bicyclists?

5-very much: 10%
4: 31%
3: 30%
2: 22%
1-not at all: 7%

n = 663
Implication

Continue to promote the benefits of sharrows. Many already believe they are making the roads safer for cyclists, but not all are convinced.
More than three-quarters are aware of BikeArlington and slightly more than a third of those consider themselves familiar with it. Awareness, however, is slightly lower among the trail intercept respondents. Among those who are aware of BikeArlington, many use their services.
A Quarter Regularly Get Their Biking Information from WABA and a Fifth Get it from BikeArlington

Q22. What information sources do you commonly use to get information on biking in Arlington County?

- WABA: 25%
- BikeArlington: 20%
- Bike maps/brochures: 19%
- Internet: 15%
- Google: 14%
- Other county websites: 10%
- Word of mouth: 7%
- E-mails: 7%
- Arlingtonva.org: 6%
- Arlington County Commuter Services: 3%
- ARLnow.com: 2%
- Capital Bike Share: 1%
- Other: 16%
- Nothing in Particular: 10%

Note: Values do not add to 100%. Respondents were able to choose more than one response.

n = 715
More Than Three-Quarters Are Aware of BikeArlington

- Capital BikeShare: 91%
- BikeArlington: 77%
- Washington Area Bike Forum: 53%
- BikeArlington Twitter Feed: 26%
- E-Newsletter: 25%
- E-blast: 12%

Q23. Following is a list of transportation organizations and services available in Arlington.

Note: Graph represents the percentage of respondents who “have used” services and who “have not used services, but are aware” to demonstrate awareness.

n = 868
Not Surprisingly, Those Who Received an Email to Take the Survey are more Aware of BikeArlington Than those Contacted Through the Trail Intercepts

Note: Graph represents the percentage of respondents who “have used” services and who “have not used services, but are aware” to demonstrate awareness.

<table>
<thead>
<tr>
<th>Service</th>
<th>Emailed Survey</th>
<th>Trail Intercept</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital BikeShare</td>
<td>92%</td>
<td>86%</td>
</tr>
<tr>
<td>BikeArlington</td>
<td>81%</td>
<td>65%</td>
</tr>
<tr>
<td>Washington Area Bike Forum</td>
<td>55%</td>
<td>42%</td>
</tr>
<tr>
<td>BikeArlington Twitter Feed</td>
<td>28%</td>
<td>19%</td>
</tr>
<tr>
<td>E-Newsletter</td>
<td>27%</td>
<td>16%</td>
</tr>
<tr>
<td>E-blast</td>
<td>11%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Awareness by how the survey was received.

n = varies
Those Who Received an Email Invitation to the Survey Are Significantly More Likely to Be Aware of Online and Social Media Service

Emailed Respondents Are No More Likely to Be Aware of E-blasts than Intercepted Respondents

- BikeArlington.com Website: 69% Emailed vs. 55% Intercepted
- Washington Area Bike Forum: 55% Emailed vs. 42% Intercepted
- BikeArlington Twitter Feed: 28% Emailed vs. 19% Intercepted
- E-newsletter: 27% Emailed vs. 16% Intercepted
- E-blasts: 11% Emailed vs. 8% Intercepted

Note: Graph shows respondents who “have used” and “have not used, but are not aware” of the services to gauge awareness.
And of Those Who Are Aware of BikeArlington, More Than One-Third Are Familiar with It

Q24. How familiar are you with BikeArlington?

- 5-Very familiar: 13%
- 4: 24%
- 3: 30%
- 2: 26%
- 1-Not at all familiar: 9%

n = 671

Note: Data represents the level of familiarity among those who are aware of BikeArlington.
Those Who Were Emailed the Survey Are Slightly More Familiar with BikeArlington Than Those at the Trail Intercepts

Familiarity by how the survey was received.

- 5-Very familiar: 13% (Emailed) vs. 7% (Trail Intercept)
- 4: 24% (Emailed) vs. 16% (Trail Intercept)
- 3: 31% (Emailed) vs. 32% (Trail Intercept)
- 2: 26% (Emailed) vs. 27% (Trail Intercept)
- 1-Not at all familiar: 7% (Emailed) vs. 18% (Trail Intercept)

n = varies
Respondents in 2011 Are Significantly More Likely to Be Familiar with BikeArlington

Note: For continuity, data for 2011 represents only those who received an email from SIR to take the survey.

Q24. How familiar are you with BikeArlington?
## More Than Half Have Used BikeArlington Services

<table>
<thead>
<tr>
<th></th>
<th>Have used in the past</th>
<th>Have not used, but am aware</th>
<th>Am not aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro/WMATA</td>
<td>85%</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>BikeArlington</td>
<td>53%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Arlington Transit (ART)</td>
<td>39%</td>
<td>47%</td>
<td>14%</td>
</tr>
<tr>
<td>The Commuter Store</td>
<td>35%</td>
<td>37%</td>
<td>28%</td>
</tr>
<tr>
<td>Washington Area Bike Forum</td>
<td>28%</td>
<td>25%</td>
<td>47%</td>
</tr>
<tr>
<td>CommuterPage.com</td>
<td>22%</td>
<td>25%</td>
<td>53%</td>
</tr>
<tr>
<td>Commuter Connections</td>
<td>21%</td>
<td>37%</td>
<td>42%</td>
</tr>
<tr>
<td>Capital BikeShare</td>
<td>19%</td>
<td>71%</td>
<td>9%</td>
</tr>
<tr>
<td>Arlington County Commuter Services</td>
<td>16%</td>
<td>29%</td>
<td>55%</td>
</tr>
<tr>
<td>WalkArlington</td>
<td>15%</td>
<td>29%</td>
<td>56%</td>
</tr>
<tr>
<td>Arlington’s Car Free Diet</td>
<td>15%</td>
<td>46%</td>
<td>39%</td>
</tr>
<tr>
<td>E-newsletter</td>
<td>10%</td>
<td>14%</td>
<td>75%</td>
</tr>
<tr>
<td>CommuterDirect.com</td>
<td>9%</td>
<td>22%</td>
<td>69%</td>
</tr>
<tr>
<td>Virginia Railway Express</td>
<td>7%</td>
<td>71%</td>
<td>21%</td>
</tr>
<tr>
<td>BikeArlington Twitter Feed</td>
<td>7%</td>
<td>19%</td>
<td>74%</td>
</tr>
<tr>
<td>Car Free Diet YouTube Channel</td>
<td>6%</td>
<td>18%</td>
<td>77%</td>
</tr>
<tr>
<td>E-blast</td>
<td>3%</td>
<td>9%</td>
<td>88%</td>
</tr>
<tr>
<td>Telework VA!</td>
<td>1%</td>
<td>11%</td>
<td>88%</td>
</tr>
</tbody>
</table>

**Q23.** Following is a list of transportation organizations and services available in Arlington.

n = 868
Demographic Differences do not Appear to Drive Whether or Not Someone has used BikeArlington Services

<table>
<thead>
<tr>
<th>Demographic Category</th>
<th>% Using BikeArlington Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>54%</td>
</tr>
<tr>
<td>Female</td>
<td>54%</td>
</tr>
<tr>
<td>Generation</td>
<td></td>
</tr>
<tr>
<td>Millennials</td>
<td>56%</td>
</tr>
<tr>
<td>Gen X</td>
<td>57%</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>49%</td>
</tr>
<tr>
<td>Income</td>
<td></td>
</tr>
<tr>
<td>Less than $60K</td>
<td>51%</td>
</tr>
<tr>
<td>$60K to $120K</td>
<td>54%</td>
</tr>
<tr>
<td>$120K or higher</td>
<td>54%</td>
</tr>
<tr>
<td>Employment</td>
<td></td>
</tr>
<tr>
<td>Employed</td>
<td>53%</td>
</tr>
<tr>
<td>Not employed</td>
<td>55%</td>
</tr>
</tbody>
</table>
Seven in Ten of Those Who have Heard of BikeArlington, have Used its Services
Respondents First Learned About BikeArlington from a Variety of Sources

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community event</td>
<td>16%</td>
</tr>
<tr>
<td>BikeArlington.com</td>
<td>9%</td>
</tr>
<tr>
<td>Brochure</td>
<td>8%</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>8%</td>
</tr>
<tr>
<td>Advertisement</td>
<td>3%</td>
</tr>
<tr>
<td>Media coverage</td>
<td>2%</td>
</tr>
<tr>
<td>CommuterPage.com</td>
<td>2%</td>
</tr>
<tr>
<td>The Commuter Store</td>
<td>2%</td>
</tr>
<tr>
<td>Calendar listing</td>
<td>0%</td>
</tr>
<tr>
<td>Other website</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>18%</td>
</tr>
<tr>
<td>Don't know/Don't remember</td>
<td>28%</td>
</tr>
</tbody>
</table>

Note: Data represents those who are aware of BikeArlington.

Q27. How did you first learn about BikeArlington?

n = 667
Implication

There is still some room for increasing awareness of BikeArlington among bikers in Arlington. Doing so should increase usage because most of those who have heard of BikeArlington have also used its services.
Overall satisfaction with BikeArlington is high and up significantly from the previous study. Respondents are likely to use and recommend BikeArlington services and nearly half have already recommended BikeArlington.
Nearly Eight in Ten are Satisfied with BikeArlington Services

Q34. How satisfied have you been overall with the services that you have used from BikeArlington?

n = 463

- 5-Very satisfied: 31%
- 4: 48%
- 3: 15%
- 2: 1%
- 1-Not at all satisfied: 0%
- Don't know: 5%
Respondents in 2011 are About as Satisfied with BikeArlington as Respondents in 2008

How satisfied have you been overall with the services that you have used from BikeArlington?
Nearly Eight in Ten of Those Who Have Used BikeArlington are Likely to Continue to Use its Services

About Half of those who Have Not Used BikeArlington Services Are Likely to Start

Note: Data represents the likelihood to use BikeArlington services among those who are aware of BikeArlington.

Q35. How likely are you to use the services of BikeArlington?

n = 666

Southeastern Institute of Research
Nearly Eight in Ten of Those Who Have Used BikeArlington Services are Likely to Recommend BikeArlington Services

Q36. How likely are you to recommend the services of BikeArlington to a friend, family member or co-worker?

n = 666

Note: This question was asked only of those who are aware of BikeArlington.
More Than Half of Those Who Use BikeArlington Have Already Recommended BikeArlington Services to Someone

Q37. Have you ever recommended BikeArlington services to someone?

- Yes: 54%
- No: 40%
- Don't know: 6%

n = 666

Note: This question was asked only of those who are aware of BikeArlington.
Encourage BikeArlington users to recommend BikeArlington services to others. Many have already done so and many more report they would.
Usage of many specific BikeArlington services is high among those who have heard of them. In general, satisfaction with specific services is high across the board.
Nearly Three-Quarters of Respondents Have Participated in the Bike to Work Day and Nearly Half Have Used BikeArlington.com

Note: The BikeArlington database contains a list of those who have participated in Bike to Work day. It is thus not surprising that this number is so high.

<table>
<thead>
<tr>
<th>Service</th>
<th>Have used</th>
<th>Have not used, but am aware</th>
<th>Am not aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bike to work day</td>
<td>74%</td>
<td>22%</td>
<td>4%</td>
</tr>
<tr>
<td>BikeArlington.com</td>
<td>44%</td>
<td>24%</td>
<td>32%</td>
</tr>
<tr>
<td>Bike DC, Washington and Arlington Community Bike Ride</td>
<td>26%</td>
<td>42%</td>
<td>32%</td>
</tr>
<tr>
<td>Capital Bikeshare</td>
<td>17%</td>
<td>73%</td>
<td>10%</td>
</tr>
<tr>
<td>Confident City cycling classes</td>
<td>6%</td>
<td>42%</td>
<td>53%</td>
</tr>
<tr>
<td>Bike to work classes for employees</td>
<td>2%</td>
<td>31%</td>
<td>67%</td>
</tr>
</tbody>
</table>

Q28. Following is a list of services and information that BikeArlington provides or supports.

n = 868
Usage is Very High Among Those Who are Aware of Bike to Work Day and BikeArlington.com

- Bike to Work Day: 77%
- BikeArlington.com: 65%
- Bike DC, Washington and Arlington Community Bike Ride: 39%
- Capital Bikeshare: 19%
- Confident City cycling classes: 12%
- Bike to Work classes for employees: 7%

n = 868

Note: Graph represents the percentage of respondents who have used services among those who have heard of the services.

Q28. Following is a list of bike services and information that BikeArlington provides or supports.
There is a Gap in Knowledge of What Programs Are Supported by BikeArlington

41% of Those Who Attend Bike to Work Day Say They Have Never Used BikeArlington

Note: Those who say they have never used BikeArlington.

Note: Graph represents those who say they have used the particular service and say they do not use BikeArlington.

Bike to Work Day: 41%
Bike DC, Washington and Arlington Community Bike Ride: 38%
Confident city cycling classes: 33%
Capital Bikeshare: 30%
BikeArlington.com: 12%

n = varies
More Than Nine in Ten Respondents Have Used Bike Lanes and Trails

<table>
<thead>
<tr>
<th>Service</th>
<th>Have used</th>
<th>Have not used, but am aware</th>
<th>Am not aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bike lanes and trails</td>
<td>92%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Bike maps</td>
<td>76%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Public Bike Racks</td>
<td>58%</td>
<td>28%</td>
<td>14%</td>
</tr>
<tr>
<td>Wayfinding signs</td>
<td>43%</td>
<td>12%</td>
<td>45%</td>
</tr>
<tr>
<td>Safe Bicycling in the Washington Area booklet</td>
<td>19%</td>
<td>25%</td>
<td>56%</td>
</tr>
</tbody>
</table>

Q28. Following is a list of services and information that BikeArlington provides or supports.

n = 868
Almost All of Those Who are Aware of the Bike Lanes and Trails Use Them

- Bike lanes and trails: 96%
- Bike maps: 87%
- Wayfinding signs: 79%
- Public bike racks: 68%
- Safe Bicycling in the Washington Area booklet: 43%
- Bike to Work classes for employees: 7%

Note: Graph represents the percentage of respondents who have used services among those who have heard of the services.

Q28. Following is a list of bike services and information that BikeArlington provides or supports.

n = 868
More Than Half Have Used BikeArlington Services More Than 10 Times in the Past Year

More than 20 times, too many to count: 42%
11 to 20 times: 9%
6 to 10 times: 12%
3 to 5 times: 14%
1 or 2 times: 13%
Have never used: 3%
Don't know/Don't remember: 8%

Q29. In the past year, about how many times have you used at least one of the BikeArlington services listed? n = 836
Respondents Are Most Satisfied with Bike to Work Day, Bike Maps, and Bike Lanes and Trails

Q30. Based on your experience, how satisfied are you with each of the following BikeArlington services and resources?

- Bike to work day: 27% Very Satisfied, 61% Somewhat Satisfied, 12% Neither Satisfied nor Dissatisfied, 2% Somewhat Dissatisfied, 2% Very Dissatisfied
- Bike Maps: 40% Very Satisfied, 46% Somewhat Satisfied, 7% Neither Satisfied nor Dissatisfied, 2% Somewhat Dissatisfied, 1% Very Dissatisfied
- Bike lanes and trails: 45% Very Satisfied, 36% Somewhat Satisfied, 5% Neither Satisfied nor Dissatisfied, 2% Somewhat Dissatisfied, 2% Very Dissatisfied
- Confident City Cycling classes: 33% Very Satisfied, 47% Somewhat Satisfied, 12% Neither Satisfied nor Dissatisfied, 2% Somewhat Dissatisfied, 2% Very Dissatisfied
- Capital Bikeshare: 31% Very Satisfied, 48% Somewhat Satisfied, 5% Neither Satisfied nor Dissatisfied, 2% Somewhat Dissatisfied, 2% Very Dissatisfied
- Bike DC, Washington and Arlington Community Bike Ride: 32% Very Satisfied, 43% Somewhat Satisfied, 8% Neither Satisfied nor Dissatisfied, 2% Somewhat Dissatisfied, 1% Very Dissatisfied
- BikeArlington.com website: 42% Very Satisfied, 28% Somewhat Satisfied, 6% Neither Satisfied nor Dissatisfied, 2% Somewhat Dissatisfied, 2% Very Dissatisfied
- Safe Bicycling in the Washington Area booklet: 46% Very Satisfied, 23% Somewhat Satisfied, 7% Neither Satisfied nor Dissatisfied, 2% Somewhat Dissatisfied, 2% Very Dissatisfied
- Public bike racks: 37% Very Satisfied, 24% Somewhat Satisfied, 8% Neither Satisfied nor Dissatisfied, 2% Somewhat Dissatisfied, 2% Very Dissatisfied
- Wayfindings signs: 41% Very Satisfied, 19% Somewhat Satisfied, 7% Neither Satisfied nor Dissatisfied, 2% Somewhat Dissatisfied, 2% Very Dissatisfied

n = varies by service

Note: Services and resources with an “n” less than 30 are excluded due to small sample size.

Note: Respondents were only asked to rate the services they have used.
Implication

Continue to promote specific BikeArlington services. Usage and satisfaction is very high among those who are aware of them. Many respondents, however, do not associate BikeArlington’s programs with BikeArlington.
Nearly half of those who use BikeArlington services report making a change in their biking behavior since beginning to use BikeArlington services.
Nearly Half Made a Change to Their Biking Behavior Since Using BikeArlington Services

Note: This question was asked only of those who have used BikeArlington services.

Q38. Since you first started using BikeArlington services, have you made any of the following changes in your biking behavior?

- Ride my bike more often for non-work trips: 25%
- Ride my bike more often for at least some portion of trip to work: 24%
- Started riding my bike for non-work trips: 16%
- Started riding my bike for at least some portion of trip to work: 14%
- Don't know: 7%
- I have not used BikeArlington services: 2%
- No, I did not make any of these changes: 44%

47% of respondents report making at least one of these changes to their biking behavior.

n = 463
More Respondents Made Changes to Their Biking Behavior in 2011

Q38. Since you first started using BikeArlington services, have you made any of the following changes in your biking behavior?
Keep up the good work! The BikeArlington programs are working to encourage respondents to change their transportation behavior.
Summary of Strategic Implications
• In general, messaging should highlight exercise and recreation benefits. Messaging directed at younger bikers, however, should also highlight cost savings and efficiency.

• Encourage bikers to bike to work more frequently. Many of them are trying it but not all are doing it on a regular basis.

• When working with employers, encourage them to offer shower facilities to their employees. Doing so will greatly encourage the usage of biking as a means to get to work.

• Encourage workers to bike to Metro stations and take the Metro to work—particularly those who live near Metro stations that are easily accessible to bike trails and lanes. The availability of bike lockers, with multiple pricing options, will further encourage this behavior.

• Continue to encourage drivers and cyclists to share the road and educate them on ways to do so.
• Continue to promote the benefits of sharrows. Many already believe that they are making the roads safer for cyclists, but not all are convinced.

• There is still some room for increasing awareness of BikeArlington among bikers in Arlington. Doing so should increase usage as well, as most of those who have heard of BikeArlington have also used its services.

• Encourage BikeArlington users to recommend BikeArlington services to others. Many have already done so and many more report that they would.

• Continue to promote specific BikeArlington services. Usage and satisfaction is very high among those who are aware of them. Many respondents, however, do not associate BikeArlington’s programs with BikeArlington.

• Keep up the good work! The BikeArlington programs are working to encourage respondents to change their transportation behavior.
Follow-up research can make use of the growing research panel...
More Than Half Say They Would Be Willing to Participate in a Research Panel

Q57. From time to time, we would like to test new ideas with an informal research panel made of people like you…would you be interested in participating on such a panel?

- Yes: 56%
- No: 44%

n = 868
Thank You

If you would like any additional information about this study, please contact Anna MacIntosh at SIR Research.
Anna@SIRresearch.com