Capital Bikeshare
2013 Customer Survey
Highlights of Results

May 22, 2013
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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
  - CB customer satisfaction

- Online survey method
  - Email invitation for travel survey sent to 11,100 members
  - Total sample of 3,731 (34% response)
  - Parallel health survey was sent to remaining 11,100 members, with 3,111 completed surveys (28% response)
  - Data from the two surveys combined for some questions
Typical and Recent Bikeshare Use
Members Averaged 8.6 CB Trips Last Month; 37% Made 1 to 5 Trips; 35% Made 11 or More
Use was well distributed across trip frequency categories – suggests demand exists for use at many levels

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

Average trips per month increased from 8.1 in 2011.
Members Use CB Most Often for Non-Work Trips - Social, Errands, Meals are Frequent Uses
But nearly 6 in 10 members use CB to get to or from work

Q10 What are the primary trips for which you use Capital Bikeshare? Rate from 1 (never use CB) to 5 (Very often use CB) for this type of trip

Non-work Trips
- Social / entertainment: 27% (2 or 3) / 43% (4 or 5)
- Errands / personal: 31% (2 or 3) / 39% (4 or 5)
- Restaurant / meal: 33% (2 or 3) / 33% (4 or 5)
- Shopping: 35% (2 or 3) / 20% (4 or 5)
- Exercise / recreation: 33% (2 or 3) / 17% (4 or 5)

Work-related Trips
- Go to / from work: 18% (2 or 3) / 40% (4 or 5)
- Go to a meeting: 26% (2 or 3) / 14% (4 or 5)
- Go to / from school: 4% (2 or 3) / 6% (4 or 5)
More than Half of Members Used CB at least Once in the Past Month to Access Metrorail

Q9 Of the Capital Bikeshare trips that you made last month, approximately how many started or ended at the following public transit locations:

- **Commuter Rail**
  - 0 trips: 91%
  - 1-2 trips: 5%
  - 3-5 trips: 22%
  - 6 or more trips: 7%

- **Bus**
  - 0 trips: 77%
  - 1-2 trips: 6%
  - 3-5 trips: 17%
  - 6 or more trips: 4%

- **Metrorail**
  - 0 trips: 46%
  - 1-2 trips: 15%
  - 3-5 trips: 22%
  - 6 or more trips: 17%

n = 3,731
The Most Common **Recent Trip** Purpose was to Go to Work, but Work is a Less Common Purpose Overall

This suggests work trips are made more frequently, but are concentrated among a smaller number of members

The “most recent trips” are evenly divided between work-related (51%) and non-work (49%) trips

Q10  What are the primary trips for which you use Capital Bikeshare?

Q11  What was the primary purpose of your **MOST RECENT** Capital Bikeshare trip?
CB was Chosen for Most Recent Trips Primarily Because Bicycle was Faster / Easier to Use

Other common reasons: Too far to walk, wanted to get exercise

Q15 For what reasons did you choose Capital Bikeshare for this particular trip, instead of another type of transportation?
Trips “Induced”
By CB Availability
40% of Members Made an Induced Trip in the Past Month - Average of 1.8 Trips
Most Induced Trips are Non-work-related and are Distributed in Proportion to Overall Non-work Trip Use

Q10 What are the primary types of trips for which you use Capital Bikeshare?
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 Most Induced Trips 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

**Trip Characteristics**
- Too far to walk: 61%

**Destination Issues**
- Bicycle is faster, easier to: 44%
- No bus/train, inconvenient to: 31%
- Parking limited / expensive at: 20%
- Too much traffic at destination: 15%

**Time of Day Issues**
- No bus/train, inconvenient that: 24%
- Don’t like to drive to destination: 12%

**Personal Reasons**
- Don’t have a car: 21%
- Wanted to get exercise: 17%
- Friends wanted to bicycle: 4%
- Other: 5%

Members under 35 years more often mention reasons related to lack of transportation (too far to walk, transit unavailable, no car)

Members 45+ years more often cite disadvantages of driving (don’t like to drive to destination at time of day, too much traffic, parking limited)

Q20 Why would you not have made these trips without Capital Bikeshare?
CB-Access Makes Business Establishments More Attractive to 85% 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?”

<table>
<thead>
<tr>
<th></th>
<th>Much less likely</th>
<th>Somewhat less likely</th>
<th>Not more likely</th>
<th>Somewhat more likely</th>
<th>Much more likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely to patronize if CB-Accessible</td>
<td>2%</td>
<td>2%</td>
<td>11%</td>
<td>48%</td>
<td>37%</td>
</tr>
</tbody>
</table>

Q21 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?
Members who Report Higher Value of CB-Access Make More Induced Trips

67% who are “much more likely” to patronize made an induced trip in past month, vs 48% who are “somewhat more likely” and 33% who are “not more likely”

Q21 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
Travel Changes Since Joining Capital Bikeshare
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
27% of Members Said they Increased their Bicycle Use Since Joining CB

High CB use was reported by members who increased bike use, but also by members who reported biking less often – Suggests they might have shifted bike use from personal bike to CB

n = 2,527

Q25 As a result of your use of Capital Bikeshare, do you use a bicycle (any bicycle) more often, less often, or about the same as before you joined Capital Bikeshare …?
A Large Share of Members Reduced Car Use, also Use of Transit, Walk, and Taxi; Indicates likely shifts to bike from all modes

“Much less” Use
Metrorail – 21%
Bus – 19%
Walk – 8%
Drive car – 30%
Taxi – 31%

Q25 As a result of your use of Capital Bikeshare, do you use a bicycle (any bicycle) more often, less often, or about the same as before you joined Capital Bikeshare…?
5% of Members Reduced their Household Vehicles; 7% Considered Doing So

50% of members who reduced their HH vehicles now are car-free – They eliminated their only vehicle

75% said CB was important to decision to sell vehicle
- 5% - CB was the main factor
- 22% - CB was major factor
- 48% - CB was minor factor
- 25% - CB was not a factor

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

Q32 To what extent did your membership in Capital Bikeshare contribute to your decision to sell or consider selling a personal vehicle?
26% of Members Who Reported both Pre-CB and With-CB Mileage Reduced Annual Driving Miles

On average, CB members reduced 198 driving miles per year

Q27 Approximately how many miles do you drive per month now in the Washington metro region (including miles in vehicles you own, rent, or borrow)?

Q28 During the year before joining Capital Bikeshare, approximately how many miles per month did you drive on average in the Washington metro region?

Q29 If you have reduced your driving miles since you joined Capital Bikeshare, to what extent did Capital Bikeshare contribute to the reduction?

n = 2,373
CB Members Reduce **4.4 Million Driving Miles** Per Year Compared with their Pre-CB Mileage

<table>
<thead>
<tr>
<th>Annual miles reduced per member</th>
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<tbody>
<tr>
<td>Annual driving miles Before CB</td>
<td>1,805</td>
</tr>
<tr>
<td>Annual driving miles Since CB</td>
<td>- 1,607</td>
</tr>
<tr>
<td>Change in driving miles (each member)</td>
<td>198</td>
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</table>

<table>
<thead>
<tr>
<th>Total annual miles reduced</th>
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<tbody>
<tr>
<td>CB members (Nov 2012)</td>
<td>22,205</td>
</tr>
<tr>
<td>Change in driving miles per member</td>
<td>x 198</td>
</tr>
<tr>
<td>Total annual driving miles reduced</td>
<td>4.4 million</td>
</tr>
</tbody>
</table>
Only 12% of CB Members Drive Alone to Work – Well Below the Regional Average
41% primarily ride transit and 30% primarily bicycle

Q35 In a typical week, how many days do you use each of the following types of transportation to get to work? If you use more than one on a single day, report the type you use for the longest distance part of your trip.
Overall 38% of Members Made a Continued Commute Change

25% Made their “Most Significant Change” to Bike

No changes 62%
Increased bike 25%
Increased transit 6%
Increased walk 4%
Increased other mode 3%

Made any continued change = 38%

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

Q35 In a typical week, how many days do you use each of the following types of transportation to get to work?
CB Members Collectively Reduced More than $2.1\text{ Million VMT}$ Annually from Commute Changes – Almost Half of the Total 4.4 VMT Reduced Overall

<table>
<thead>
<tr>
<th>Employed CB members with mode change</th>
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</thead>
<tbody>
<tr>
<td>CB members (Nov 2012)</td>
<td>22,205</td>
</tr>
<tr>
<td>Employed members (95%)</td>
<td>X 95%</td>
</tr>
<tr>
<td>Members with mode change (38%)</td>
<td>X 38%</td>
</tr>
<tr>
<td><strong>Total employed “changers”</strong></td>
<td>8,016</td>
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</table>

Annual commute VMT reduced per “changer” 265

Total annual commute VMT reduced 2,124,200
Motivation and Satisfaction with 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 help the environment.

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.

- Get around easily, faster, shorter: 91% very important (5), 69% important (4), 22% less important (2), n = 5,588
- New option, one-way travel option: 80% very important (5), 51% important (4), 29% less important (2), n = 5,588
- Like to bike, fun way to travel: 76% very important (5), 44% important (4), 32% less important (2), n = 5,588
- Exercise, fitness: 57% very important (5), 27% important (4), 30% less important (2), n = 5,588
- Save money on transportation: 52% very important (5), 29% important (4), 23% less important (2), n = 5,588
- Environmental concern: 48% very important (5), 22% important (4), 26% less important (2), n = 5,588
- Access to another bike, backup: 30% very important (5), 21% important (4), 19% less important (2), n = 5,588
- Health concerns: 17% very important (5), 17% important (4), 10% less important (2), n = 5,588
Younger Members were Motivated by Ease of Getting Around and Saving Money; Older Members by Exercise, Environment, Health

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

Q52 What is your age?

Under 35 years
n = 3,411

35 – 44
n = 1,067

45 and older
n = 699
On Average, Members Save $15.39 per Week on their Travel Costs = $800 Per Year

Members who make 11 or more CB trips per month save an average of $21.63 per week ($1,125 per year)

Q22 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?

- $0 per week: 13%
- $1 - $20 per week: 63%
- $21 - $40 per week: 17%
- $41 - $60 per week: 4%
- More than $60: 3%

n = 2,752
CB Members Collectively Save More than $17.7 Million Per Year on Personal Travel Costs

<table>
<thead>
<tr>
<th>Annual travel cost reduced per member</th>
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<tbody>
<tr>
<td>Weekly travel cost saving</td>
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<tr>
<td>Weeks per year</td>
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<tr>
<td>Annual saving (per member)</td>
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<table>
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<tr>
<th>Total travel cost saving</th>
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<tbody>
<tr>
<td>CB members (Nov 2012)</td>
</tr>
<tr>
<td>Cost saving per member</td>
</tr>
<tr>
<td>Total annual travel cost saved</td>
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</tbody>
</table>

Q22 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?
CB Members Spend More Time Exercising Since Joining CB

37% of members say they have “somewhat increased” and 5% have “greatly increased” their physical activity

48% of members say they use CB as one form of exercise

**Weekly hours of exercise before and after joining CB**

Q12 In a typical week, how many hours do you exercise or engage in moderate to strenuous physical activities?

Q15 Before you joined Capital Bikeshare, how many hours a week did you exercise or engage in moderate to strenuous physical activities?
And they Rate their Health to Be Better Since Joining

Health self-assessment before and since Joining CB

Q17 In general, how would you rate your general health?
Q18 How would you rate your general health at the time you joined Capital Bikeshare?
Members Give Generally High Marks to Most CB Features

At least two-thirds gave ratings of 4 or 5 to all features except nighttime lighting at stations.
What Members Like Most About CB – CONVENIENCE!

Q58 What do you like best about using Capital Bikeshare bikes?
Some Quotes – **What Members Like**

“Freedom!” “Flexibility” “Convenient” “Spontaneous”

“Eco-friendly” “Fun” “Get exercise” “Faster commute”

“Great for one-way or unexpected trips” “Dock it and forget it”

“Flexibility of one-way drop-off”

“Not having to worry about bike parking and theft”

“Nice to have an option to bike rather than walk or drive”

“I use CB when Metro is slow or when I’ve just missed a bus”

“Love to pick it up and go – not have to maintain the bike”

“Riding makes me happy“ “Cruising around feeling the wind in my face!” “It adds an element of fun to errands around town”

“Access to areas not served by buses/Metro”

“Reduces 10-minute walk from Metro to my office to 90 seconds”
Members want More Bikeshare Opportunities

The Most Requested CB Expansions Appear to be More Docks at Existing Stations and Expansion to Residential Areas

<table>
<thead>
<tr>
<th>Expansion Option</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>More docks at existing stations</td>
<td>47%</td>
</tr>
<tr>
<td>More stations in residential neighborhoods</td>
<td>43%</td>
</tr>
<tr>
<td>Expansion to areas CB doesn't operate now</td>
<td>36%</td>
</tr>
<tr>
<td>Expansion to areas CB operates now</td>
<td>34%</td>
</tr>
<tr>
<td>More stations in commercial/employment areas</td>
<td>23%</td>
</tr>
<tr>
<td>More stations near Metrorail</td>
<td>17%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
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</table>

n = 2,976

Q48 Which of the following Capital Bikeshare expansion options are most needed? (Multiple response permitted)
Summary of Top Survey Findings
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.

- 90% of members had used bikeshare trip for a non-work purpose and 58% made a bikeshare trip to/from work.

- Overall, most bikeshare trips are for non-work purposes, but 42% of “most recent” trips were to go to / from work.

- CB serves an important transit access function – over half of members used CB to access transit in the past month.
Top Findings – Accessibility

- **40%** 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;
  - **85%** 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

- 27% of members increased their bike use since joining.
- Bikeshare members have shifted some trips to bicycle from other modes – 50% reduced car use, 61%, reduced taxi use, 61% ride Metrorail less often.
- 25% of members reduced driving miles; 5% sold a HH car.
- 38% reduced commute vehicle trips – bike/transit/walk.
- Members reduced 4.4 million annual driving miles since joining CB – half during peak commuting periods.
Top Findings – Member Satisfaction

- Bikeshare members save an average of $800 per year on personal travel cost; These savings pay for the $75 membership fee within 2 months

- Collectively, CB members save almost $18 million each year in travel costs

- More than three-quarters of members gave ratings of 4 or 5 (Excellent) to the website, safety of stations, map at stations, and mechanical repair of bikes.

- Desirable CB expansion appears to be more docks at existing stations and expansion to residential neighborhoods
Questions?

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For those on the webinar – please type your questions