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%

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.
CB Members’ Gender and Race/Ethnicity Distributions Also Differed from those of Regional Commuters

<table>
<thead>
<tr>
<th></th>
<th>2014 CB</th>
<th>2013 SOC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>59%</td>
<td>45%</td>
</tr>
<tr>
<td>Female</td>
<td>41%</td>
<td>56%</td>
</tr>
<tr>
<td><strong>Race/Ethnicity</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>84%</td>
<td>50%</td>
</tr>
<tr>
<td>Asian</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Hispanic / Latino</td>
<td>5%</td>
<td>13%</td>
</tr>
<tr>
<td>African-American</td>
<td>3%</td>
<td>25%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Demographics</th>
<th>2011</th>
<th>2012</th>
<th>2014</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>45 or older</td>
<td>14%</td>
<td>17%</td>
<td>20%</td>
<td>(+6%)</td>
</tr>
<tr>
<td>Live outside DC</td>
<td>17%</td>
<td>22%</td>
<td>25%</td>
<td>(+8%)</td>
</tr>
<tr>
<td>Income over $100K</td>
<td>39%</td>
<td>45%</td>
<td>50%</td>
<td>(+11%)</td>
</tr>
<tr>
<td>Male</td>
<td>55%</td>
<td>57%</td>
<td>59%</td>
<td>(+4%)</td>
</tr>
<tr>
<td>White</td>
<td>81%</td>
<td>80%</td>
<td>84%</td>
<td>(+4%)</td>
</tr>
</tbody>
</table>

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

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

2011 CB Survey n = 5,464
2012 CB Survey n = 3,731
2014 CB Survey n = 4,313
CB Information and Motivation
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.

- Saw CB station: 30%
- Referral (friend/family/coworker): 26%
- Newspaper/magazine: 7%
- Saw someone riding CB bike: 6%
- Employer/info at work: 4%
- Social media: 4%
- Don’t recall: 14%
- Other: 8%

2014 Survey
n = 4,307

Q5 How did you first learn about Capital Bikeshare?
CB Visibility and Referrals Increased as Info Sources; Social Media and Print Media Declined Since 2010

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

2014 Survey n = 4,207

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

- **Get around easily, faster, shorter**: Increase with age
- **Save money on transportation**: Decrease with age
- **Fun way to travel**: Increase with age
- **Exercise/fitness**: Increase with age
- **Environment**: Increase with age
- **Health**: Increase with age

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

Q52 What is your age?

2014 Survey

Under 35 years
n = 2,331

35 – 44
n = 804

45 and older
n = 803
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.

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

2012 Survey n = 4,312
# Who Rode CB Frequently?

Members made 6 or more trips in past month …

<table>
<thead>
<tr>
<th>All members</th>
<th>59%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members who …</td>
<td>vs average</td>
</tr>
<tr>
<td>- Were under 25 years</td>
<td>76%</td>
</tr>
<tr>
<td>- Motivated by saving money</td>
<td>69%</td>
</tr>
<tr>
<td>- Had no personal vehicle</td>
<td>68%</td>
</tr>
<tr>
<td>- Had no personal bicycle</td>
<td>64%</td>
</tr>
<tr>
<td>- Were male</td>
<td>65%</td>
</tr>
<tr>
<td>- Joined in 2014</td>
<td>64%</td>
</tr>
</tbody>
</table>

## 2014 Survey

<table>
<thead>
<tr>
<th>Category</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>All members</td>
<td>4,312</td>
</tr>
<tr>
<td>Under 25</td>
<td>316</td>
</tr>
<tr>
<td>Save money</td>
<td></td>
</tr>
<tr>
<td>No vehicle</td>
<td>2,458</td>
</tr>
<tr>
<td>Male</td>
<td>2,338</td>
</tr>
<tr>
<td>No personal bicycle</td>
<td>2,091</td>
</tr>
<tr>
<td>Joined recently Jul – Nov 2012</td>
<td>1,404</td>
</tr>
</tbody>
</table>
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

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

<table>
<thead>
<tr>
<th>Type of Trip</th>
<th>Occasionally, but &lt;3 times / month</th>
<th>1 - 2 times / month</th>
<th>3 - 5 times / month</th>
<th>6 or more times / month</th>
<th>Total Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social / entertainment / visit friends</td>
<td>17%</td>
<td>29%</td>
<td>23%</td>
<td>16%</td>
<td>85%</td>
</tr>
<tr>
<td>Personal appointments</td>
<td>23%</td>
<td>30%</td>
<td>17%</td>
<td>9%</td>
<td>79%</td>
</tr>
<tr>
<td>Shopping / errands</td>
<td>22%</td>
<td>28%</td>
<td>18%</td>
<td>10%</td>
<td>78%</td>
</tr>
<tr>
<td>Restaurant / meal</td>
<td>21%</td>
<td>28%</td>
<td>18%</td>
<td>10%</td>
<td>77%</td>
</tr>
<tr>
<td>Exercise, fitness</td>
<td>24%</td>
<td>15%</td>
<td>9%</td>
<td>6%</td>
<td>54%</td>
</tr>
<tr>
<td>Go to or from work</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
<td>36%</td>
<td>74%</td>
</tr>
</tbody>
</table>
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

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

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

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

Q52  What is your age?

2014 Survey
- Under 35 years: n = 2,358
- 35 – 44 years: n = 821
- 45 and older: n = 830
Members **Without a Personal Vehicle** Used CB More for All Trip Purposes did Members who Had Vehicles

<table>
<thead>
<tr>
<th>Trip Purpose</th>
<th>No vehicle available</th>
<th>Vehicle available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social / entertainment</td>
<td>92%</td>
<td>85%</td>
</tr>
<tr>
<td>Personal appointments</td>
<td>88%</td>
<td>81%</td>
</tr>
<tr>
<td>Restaurant / meal</td>
<td>86%</td>
<td>77%</td>
</tr>
<tr>
<td>Shopping / errands</td>
<td>87%</td>
<td>78%</td>
</tr>
<tr>
<td>Exercise / recreation</td>
<td>60%</td>
<td>55%</td>
</tr>
<tr>
<td>Go to/from work</td>
<td>80%</td>
<td>73%</td>
</tr>
</tbody>
</table>

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

2014 Survey

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

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

- Go to or from work: 46%
- Go to or from school: 3%
- Social / entertainment: 19%
- Personal appointment: 9%
- Shopping/errands: 8%
- Exercise/go to gym: 7%
- Restaurant/meal: 5%
- Other: 3%

Commute purposes – 49%
Non-commute purposes – 51%

2014 Survey
n = 4,292
63% of Weekday Trips were to Go to/from Work or School; 94% of Weekend trips were for Non-work Purposes

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

### Trip Characteristics
- Too far to walk: 42%

### Destination Issues
- Bicycle is faster, easier to destination: 80%
- No bus/train, inconvenient to destination: 23%
- Parking limited / expensive at destination: 21%
- Too much traffic at destination: 15%

### Time of Day Issues
- No bus/train, inconvenient that time of day: 20%
- Don't like to drive to destination that time: 15%

### Personal Reasons
- Bicycling is cheaper than other options: 42%
- Wanted to get exercise: 39%
- Don't have a car: 23%
- Other: 7%

Q15 For what reasons did you choose Capital Bikeshare for your most recent trip, instead of another type of transportation?
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

2014 Survey
n = 4,289

Q16 If Capital Bikeshare had not been available, how would you have made this trip?
Trips “Induced”
By CB Availability
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?”

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 …

<table>
<thead>
<tr>
<th>All members</th>
<th>49%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members who …</td>
<td>vs average</td>
</tr>
<tr>
<td>had income under $75,000</td>
<td>57%</td>
</tr>
<tr>
<td>had no personal vehicle</td>
<td>56%</td>
</tr>
<tr>
<td>were male</td>
<td>53%</td>
</tr>
<tr>
<td>had no personal bicycle</td>
<td>52%</td>
</tr>
<tr>
<td>were younger than 35</td>
<td>51%</td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>2014 Survey</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All members</td>
<td>n = 4,331</td>
</tr>
<tr>
<td>Income under $75,000</td>
<td>n = 1,195</td>
</tr>
<tr>
<td>No personal vehicle</td>
<td>n = 1,855</td>
</tr>
<tr>
<td>Male</td>
<td>n = 2,340</td>
</tr>
<tr>
<td>No personal bicycle</td>
<td>n = 2,091</td>
</tr>
<tr>
<td>Under 35</td>
<td>n = 1,358</td>
</tr>
</tbody>
</table>
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

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

**Trip Characteristics**
- Too far to walk: 65%

**Destination Issues**
- Bicycle is faster, easier to destination: 48%
- No bus/train, inconvenient to destination: 37%
- Parking limited / expensive at destination: 21%
- Too much traffic at destination: 16%

**Time of Day Issues**
- No bus/train, inconvenient that time of day: 23%
- Don't like to drive to destination that time of day: 16%

**Personal Reasons**
- Bicycling I cheaper than other options: 25%
- Don't have a car: 25%
- Wanted to get exercise: 18%
- Other: 3%

Q19 Why would you not have made these trips without Capital Bikeshare?

2012 Survey
n = 2,066
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

2014 Survey  n = 4,298

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?
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”

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”

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?
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

- 10.9 trips* (49%)
- 7.5 trips (24%)
- 8.0 trips (12%)
- 15.3 trips (15%)

0-2 trips 3-5 trips 6-10 trips 11 or more trips

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

<table>
<thead>
<tr>
<th>Travel Option</th>
<th>Somewhat less often</th>
<th>Much less often</th>
<th>About the same</th>
<th>Somewhat / much more often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive a car</td>
<td>-43%</td>
<td>-7%</td>
<td>-44%</td>
<td>41%</td>
</tr>
<tr>
<td>Taxi</td>
<td>-49%</td>
<td>-21%</td>
<td>-31%</td>
<td>45%</td>
</tr>
<tr>
<td>Metrorail</td>
<td>-54%</td>
<td>-20%</td>
<td>-38%</td>
<td>38%</td>
</tr>
<tr>
<td>Bus</td>
<td>-60%</td>
<td>-27%</td>
<td>-32%</td>
<td>40%</td>
</tr>
<tr>
<td>Walk</td>
<td>-60%</td>
<td>-27%</td>
<td>-32%</td>
<td>40%</td>
</tr>
</tbody>
</table>

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 …? …?
Most significant shifts appeared to be from Metrorail and bus

<table>
<thead>
<tr>
<th>CB Trips In Past Month</th>
<th>Percentage of Members who Reduced Use of Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Metrorail</td>
</tr>
<tr>
<td>1-5 trips</td>
<td>46%</td>
</tr>
<tr>
<td>6-10 trips</td>
<td>62%</td>
</tr>
<tr>
<td>11-19 trips</td>
<td>66%</td>
</tr>
<tr>
<td>20 or more trips</td>
<td>74%</td>
</tr>
<tr>
<td>Difference between 20+ and 1-5</td>
<td>28%</td>
</tr>
</tbody>
</table>

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

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.

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

76% said CB was important to decision to sell vehicle
1% - CB was the main factor
24% - CB was major factor
51% - CB was minor factor

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**

- **Reduced HH vehicles**
  - 0 HH vehicles: 52%
  - 1 HH vehicle: 39%
  - 2 HH vehicles: 8%

- **Did not reduce HH vehicles**
  - 0 HH vehicles: 34%
  - 1 HH vehicle: 47%
  - 2 HH vehicles: 19%

**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+

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.

Reduced driving miles = 24%

- More than 2,500 miles: 5%
- 1,001 - 2,500 miles: 3%
- 501 - 1,000 miles: 4%
- 1 - 500 miles: 12%

Increased driving miles = 12%

- No change: 64%
- 1 - 500 miles: 8%
- More than 500 miles: 4%

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

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

48% said it was the main or a major factor.
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>
</tr>
</thead>
<tbody>
<tr>
<td>Annual driving miles Before CB</td>
</tr>
<tr>
<td>Annual driving miles Since CB</td>
</tr>
<tr>
<td>Change in driving miles (each member)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total annual miles reduced</th>
</tr>
</thead>
<tbody>
<tr>
<td>CB members (Nov 2014)</td>
</tr>
<tr>
<td>Change in driving miles per member</td>
</tr>
<tr>
<td>Total annual driving miles reduced</td>
</tr>
</tbody>
</table>
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)

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?

- $0 per week: 17%
- $1 - $20 per week: 63%
- $21 - $40 per week: 16%
- $41 - $60 per week: 4%
- More than $60: 3%

2014 Survey  n = 3,979
CB Members Collectively Save **$19.6 Million Per Year** on Personal Travel Costs

<table>
<thead>
<tr>
<th>Annual travel cost reduced per member</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly travel cost saving</td>
</tr>
<tr>
<td>Weeks per year</td>
</tr>
<tr>
<td>Annual saving (per member)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total travel cost saving</th>
</tr>
</thead>
<tbody>
<tr>
<td>CB members (Nov 2014)</td>
</tr>
<tr>
<td>Cost saving per member</td>
</tr>
<tr>
<td><strong>Total annual travel cost saved</strong></td>
</tr>
</tbody>
</table>

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

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?

2014 Survey
n = 4,080
CB Members Traveled Much Shorter Distances to Work than did Commuters Region-wide

CB average = 6.2 miles
Regional average = 16.0 miles

Less than 5 miles
CB = 61%
All commuters = 17%

5 miles or more
CB = 39%
All commuters = 83%

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

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

2014 Survey
Under 2 miles n = 645
2 – 4.9 miles n = 1,755
5 – 9.9 miles n = 820
10+ miles n = 728
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

Q35 How often do use a different type of transportation to get home FROM work than you used to get TO work?

2014 Survey
n = 4,046
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.

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

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

2012 Report
Change
44% bicycle
13% walk
11% transit
8% TW
2% CP/VP

2014 Survey
n = 4,125
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

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

- Primary bike change: 13%
- Secondary bike change: 19%
- Temporary/occasional use: 4%
- Continued bike use/no change: 35%
- No bike before/after: 29%
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

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

Bicycle-Support Services
- Showers / personal lockers: 40%
- Bike racks / lockers: 39%
- CaBi Corporate Partner Membership: 12%
- Financial incentive / subsidy for bicycling: 10%

Non-Bicycle Support Services
- SmartBenefits transit / vanpool subsidy: 44%
- Telework: 39%
- Flextime: 37%
- Alternative work schedule: 26%
- Zipcar membership: 4%

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

<table>
<thead>
<tr>
<th></th>
<th>CB</th>
<th>SOC</th>
</tr>
</thead>
<tbody>
<tr>
<td>All members</td>
<td>56%</td>
<td>27%</td>
</tr>
<tr>
<td>Members who work in</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alexandria</td>
<td>56%</td>
<td>22%</td>
</tr>
<tr>
<td>Arlington</td>
<td>59%</td>
<td>35%</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>67%</td>
<td>40%</td>
</tr>
<tr>
<td>Montgomery/Prince George’s</td>
<td>49%</td>
<td>17%</td>
</tr>
<tr>
<td>Other</td>
<td>43%</td>
<td>22%</td>
</tr>
</tbody>
</table>

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%)
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.

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)

- Safety of stations
  - 1 (Poor) - 2
  - 3
  - 4
  - 5 (Excellent)

- Capital bikeshare website

- Call center

- Mechanical repair of bikes

- Map at Capital Bikeshare

- Nighttime lighting at stations

- Availability of bikes at docks

- Availability of open docks

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

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

- Mechanical issues with bike
  - 2014 CB Survey: 35%
  - 2012 CB Survey: 26%
  - 2011 CB Survey: 24%

- Issues with bike dock
  - 2014 CB Survey: 34%
  - 2012 CB Survey: 17%
  - 2011 CB Survey: 22%

- Issues with membership key
  - 2014 CB Survey: 28%
  - 2012 CB Survey: 18%
  - 2011 CB Survey: 17%

- Had any issue
  - 2014 CB Survey: 68%
  - 2012 CB Survey: 40%
  - 2011 CB Survey: 43%

2014 Survey n = 4,118
2012 Survey n = 3,731
2011 Survey n = 5,260
Frequent CB Users had Encountered More Problems than had Infrequent Riders

This is likely due to their greater exposure

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

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

- More docks at existing stations: 54%
- More stations in residential neighborhoods: 44%
- Expansion to areas CB operates now: 43%
- Expansion to areas CB doesn't operate now: 32%
- More stations in commercial/employment areas: 23%
- More stations near Metrorail: 15%

2014 Survey
n = 4,079
DC Residents Preferred Infill / Expansion in Existing Areas; Members Outside DC Want Greater Coverage

2014 Survey

<table>
<thead>
<tr>
<th>Capital Bikeshare Expansion Options</th>
<th>Home Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DC</td>
</tr>
<tr>
<td>More docks at existing stations</td>
<td>60%</td>
</tr>
<tr>
<td>Greater density / infill (existing areas)</td>
<td>48%</td>
</tr>
<tr>
<td>Residential neighborhoods</td>
<td>47%</td>
</tr>
<tr>
<td>Greater coverage (unserved areas)</td>
<td>26%</td>
</tr>
<tr>
<td>Commercial / employment areas</td>
<td>22%</td>
</tr>
<tr>
<td>Near Metrorail stations</td>
<td>12%</td>
</tr>
</tbody>
</table>

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

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

- **Bike Paths / Lanes**
  - Lack of dedicated bicycle lanes or paths: 52%
  - Bike paths/lanes don't connect to...: 43%
  - Bike lanes on street are not...: 30%
  - Insufficient lighting on bike paths/lanes: 10%

- **Drivers**
  - Drivers are inconsiderate of bicyclists: 48%
  - Drivers are not aware of bicyclists: 39%

- **Roads / Traffic**
  - Road surface is poorly maintained: 40%
  - Too much car traffic on local roads: 35%
  - Car traffic moves too fast: 22%
  - Don't like to ride after dark: 18%
  - Terrain is too hilly: 14%

- **Bike Services**
  - Not enough bike lockers or racks: 21%
  - No place to shower after riding to work: 15%

2014 Survey
n = 4,082
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

<table>
<thead>
<tr>
<th>Barrier to Bicycling</th>
<th>Capital Bikeshare Trips in Past Month</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0 Trips</td>
</tr>
<tr>
<td><strong>Infrequent CB Rider Concerns</strong></td>
<td></td>
</tr>
<tr>
<td>Too much car traffic on local roads</td>
<td>39%</td>
</tr>
<tr>
<td>Car traffic moves too fast</td>
<td>24%</td>
</tr>
<tr>
<td>Lanes not separated from traffic</td>
<td>33%</td>
</tr>
<tr>
<td>Don’t like to ride after dark</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Frequent CB Rider Concerns</strong></td>
<td></td>
</tr>
<tr>
<td>Lack of dedicated bike lanes</td>
<td>48%</td>
</tr>
<tr>
<td>Paths / lanes don’t connect</td>
<td>36%</td>
</tr>
<tr>
<td>Road surface poorly maintained</td>
<td>27%</td>
</tr>
<tr>
<td>Not enough bike lockers / racks</td>
<td>17%</td>
</tr>
</tbody>
</table>

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?

2014 Survey

CB trips made last month:

<table>
<thead>
<tr>
<th>Trips</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 trips</td>
<td>289</td>
</tr>
<tr>
<td>1-5 trips</td>
<td>1,480</td>
</tr>
<tr>
<td>6-10 trips</td>
<td>816</td>
</tr>
<tr>
<td>11 or more trips</td>
<td>1,727</td>
</tr>
</tbody>
</table>
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.
- 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.
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