



2013 Bike to Work Day Survey Highlights

Bike to Work Day Steering Committee

March 12, 2014

LDA Consulting

with CIC Research

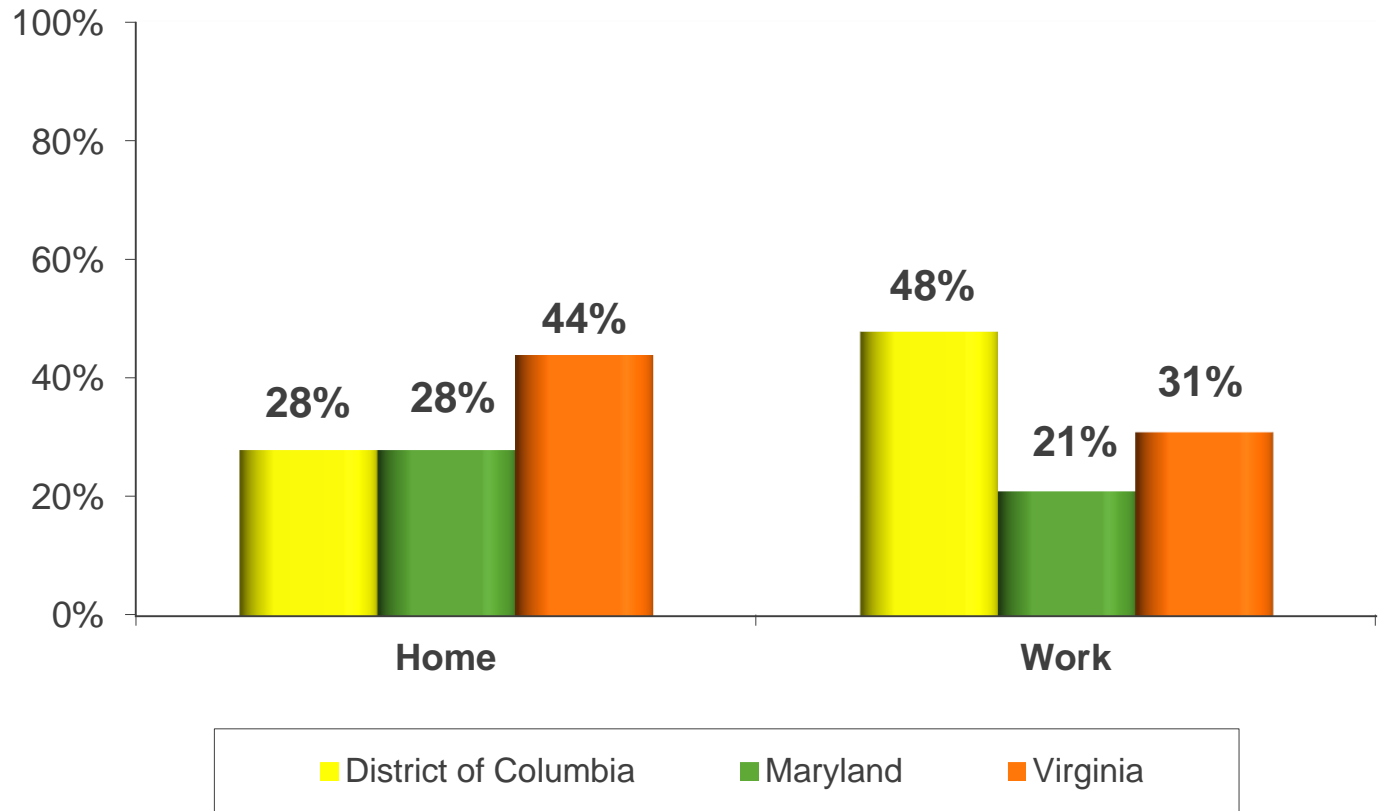


Methodology

Survey Methodology

- Internet survey of BTW Day participants
 - November 2013
 - Emailed 14,643 invitations, 4,255 responses, 30% response rate
- Collect data for analysis of Mass Marketing TERM
 - Define new and increased bike commute use
 - Bike commuting before BTW
 - Bike commuting in summer after BTW
 - Bike commuting in fall after BTW
 - Estimate vehicle trips and VMT reduced by biking using mode and commute distance on non-bike days
- Added new demographic questions in 2013

Four in Ten BTW Day Participants Live in Virginia; But Five in Ten Work in the District of Columbia



Home location
n = 4,032

Work location
n = 4,049

Q16 In what zip code is your workplace?
Q17 In what zip code is your home?



BTW Participant Demographics vs Region

- **Predominantly male** - 66% vs 45% regionally
- **Overwhelmingly White** – 86% vs 50% regionally
- **Young** – 51% under 45 years vs 39% regionally
- **Work for large org** – 53% 250+ empl vs 39% regionally
- Similar HH income – 74% \$80,000+ vs 71% regionally

Regional stats from 2013 SOC

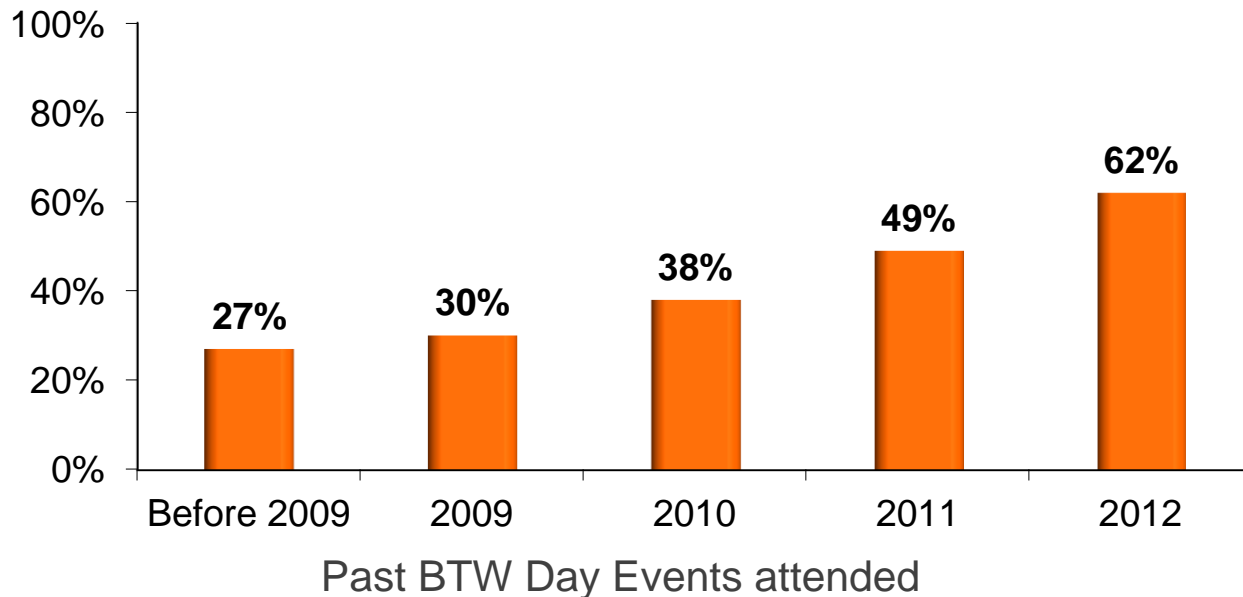
Event Information and Participation



Joan M. Mas 2/2007

2013 was First BTW Day for 26% of Respondents

More than six in ten 2013 riders also participated in BTW 2012 and 49% participated in 2011. More than a quarter participated in a BTW event before 2009.



34% Heard about BTW Day through Internet and 22% from a Personal Referral

Results similar to 2010, but social media displaced some Internet /email

Age differences noted for:

Social media

Under 35 – 15%

45+ – 6%

Referrals

Under 35 – 32%

45+ – 18%

WABA

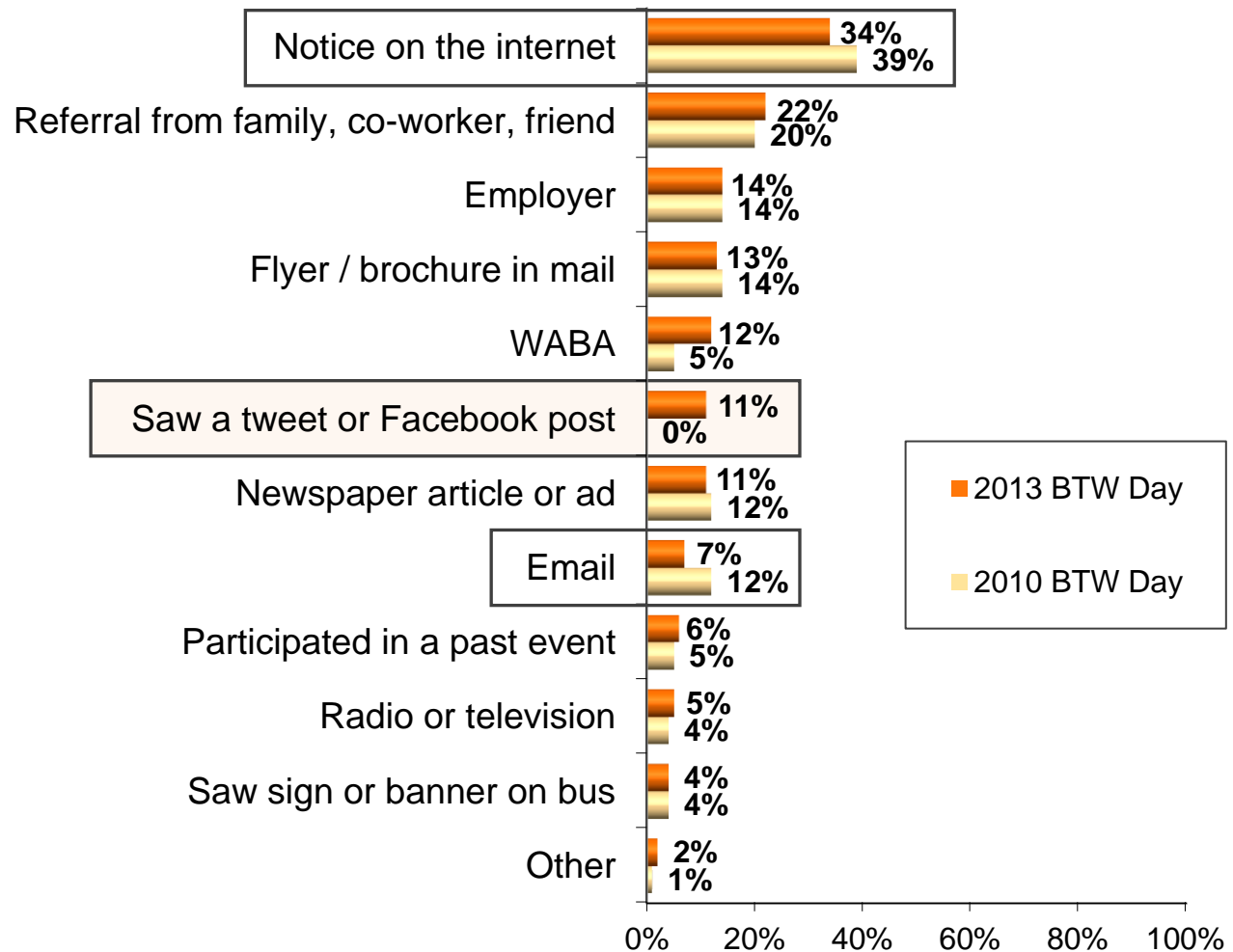
Under 35 – 2%

45+ – 15%

Internet

Under 35 – 26%

55+ – 40%



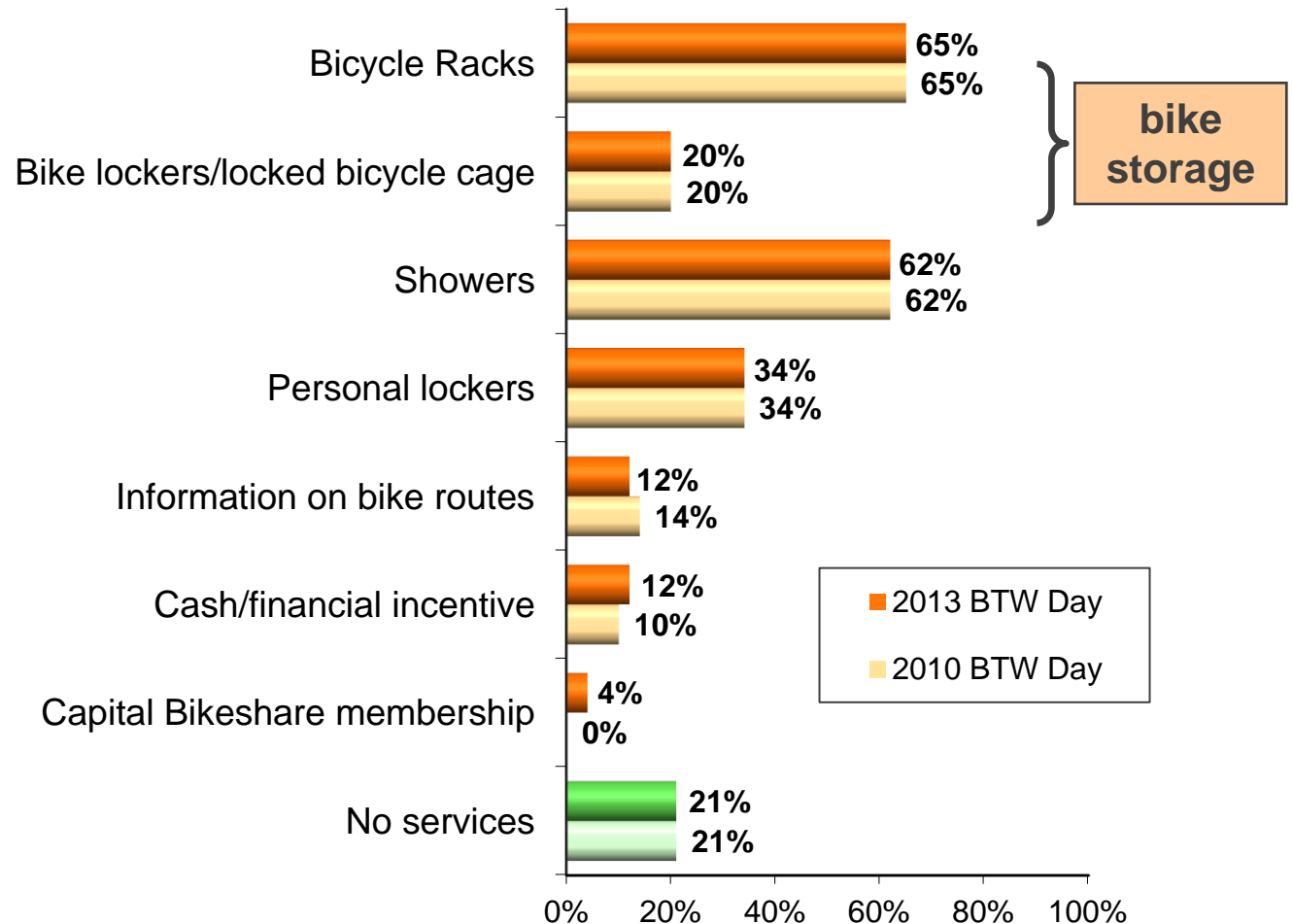
2013 BTW
n = 4,253

2010 BTW
n = 3,015

Q1 How did you hear about the 2010 Bike-to-Work Day?

79% of Respondents said Employer Offers Bike-Commute Assistance – Same as in 2010

Bicycle racks – 65%, Showers – 62%, Personal lockers – 34%



2013 BTW
n = 4,149

2010 BTW
n = 2,991

Q12 Does your employer offer any of the following commute assistance information or services to employees who bike to work?

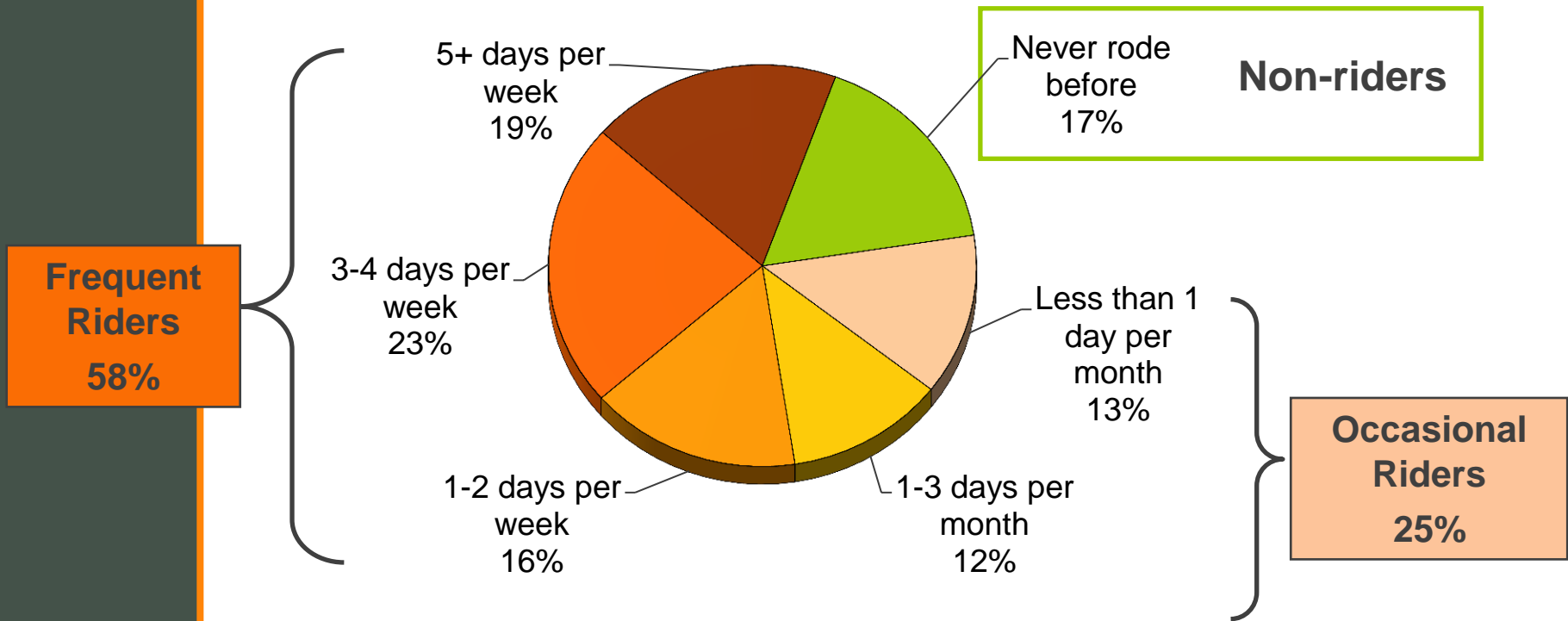


Travel Before / After BTW Day



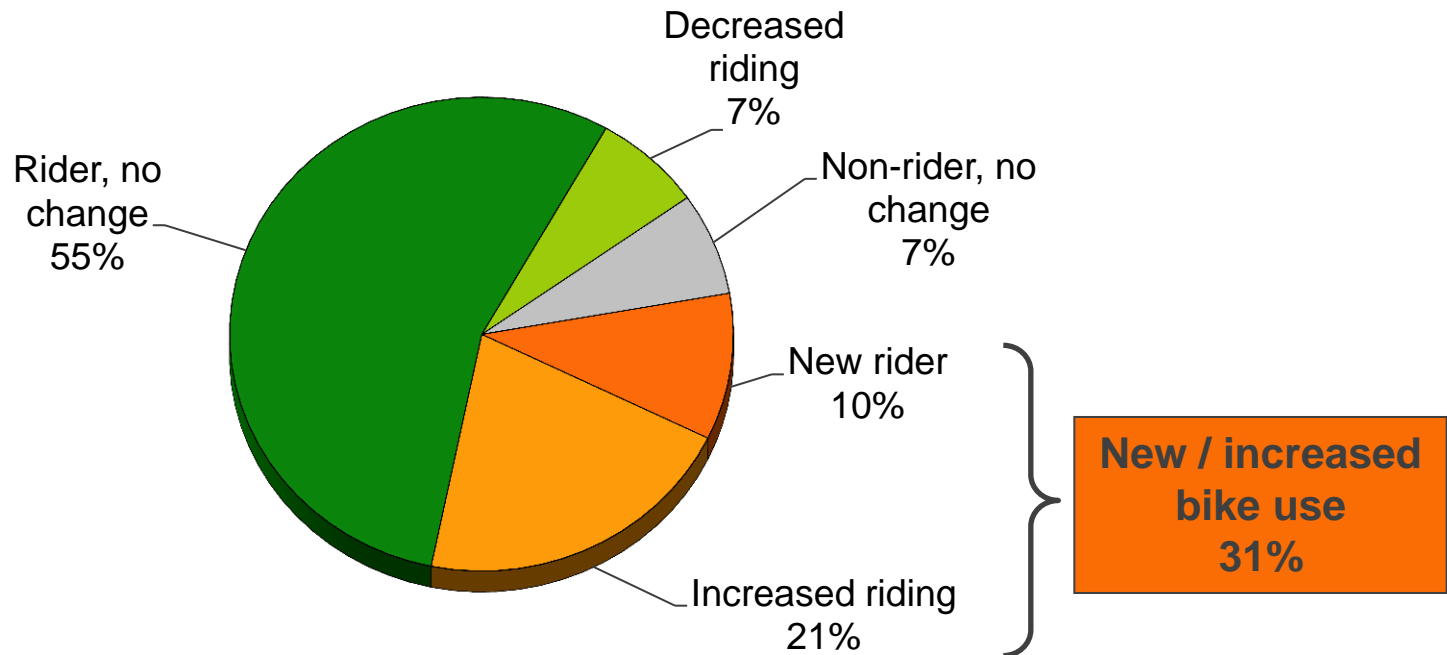
Before their First BTW Day - 83% of Respondents Biked to Work at Least Occasionally

58% were frequent riders (1+ days per week); 25% rode, but less than 1 day per week; 17% never rode before BTW Day.



10% Started Biking to Work and 21% Increased Bike Frequency after 2013 BTW Day

About half of respondents rode before and didn't change how often they rode, 7% decreased their biking frequency; 7% didn't ride before and didn't start riding.

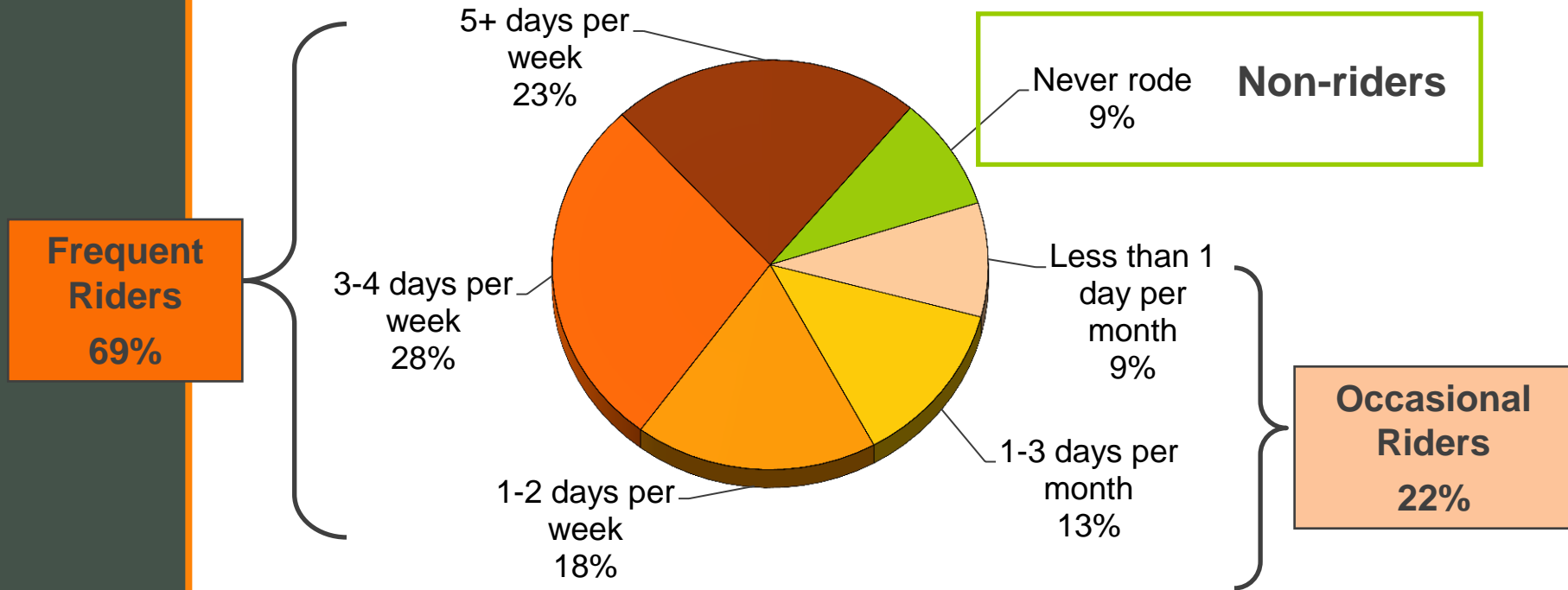


Q3 On average, how often did you ride your bicycle to work **before** your first Bike-to-Work Day event?

Q4 On average, how often did you ride your bicycle to work during May – September, 2013, **after** the 2013 Bike-to-Work Day event?

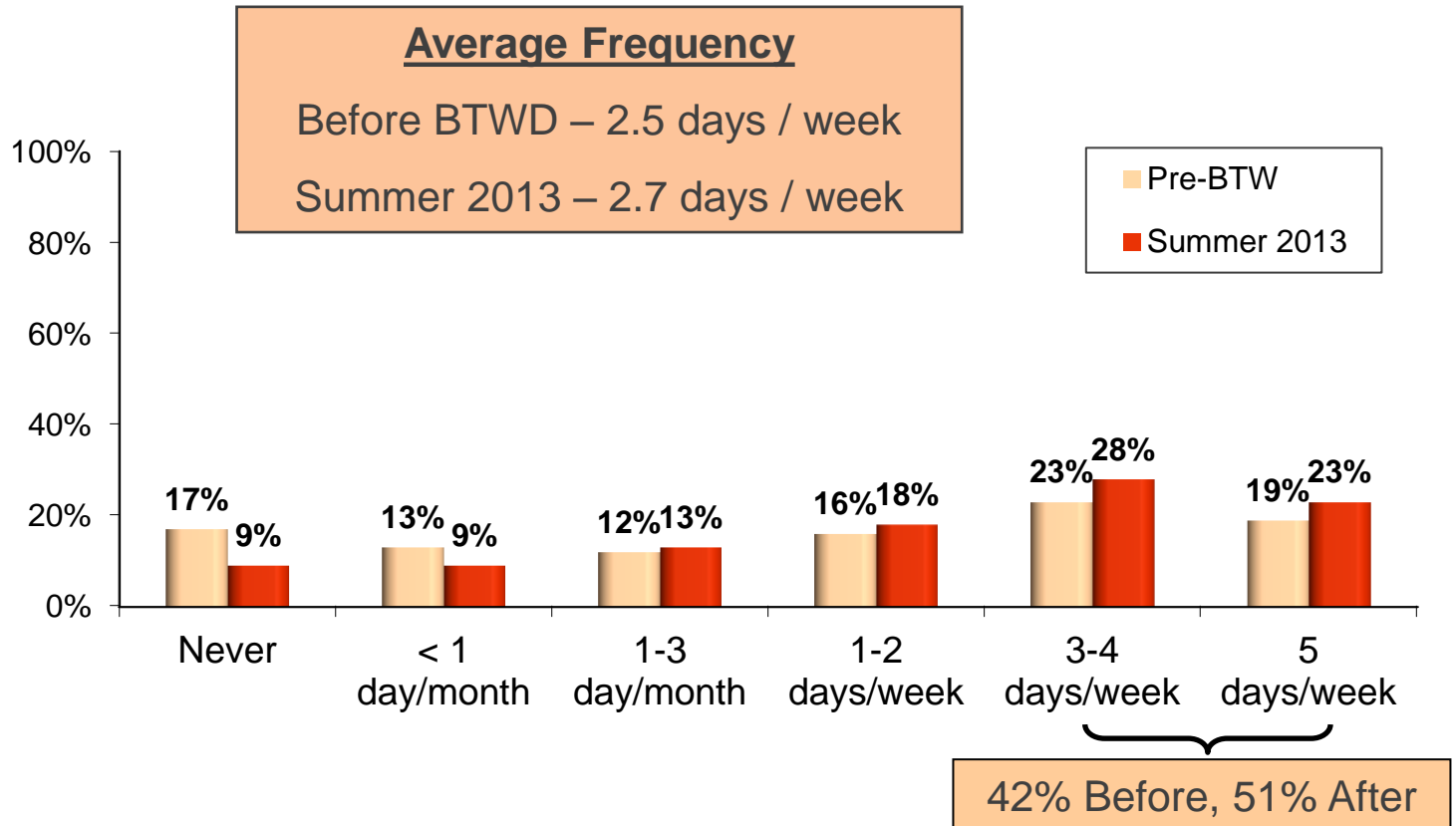
In Summer, after BTW 2013 - 91% of Respondents Biked to Work at Least 1 Day / Month

The share of “non-riders” fell from 17% before BTW Day to 9% after BTW Day. Frequent riders grew by 11% to 69%.



Average Bike Frequency Rose 0.2 Days / Week From Before BTW Day to Summer 2013

Respondents who biked before BTWD rode an average of **2.5** days then. Respondents who biked during summer 2013 rode **2.7** days per week. Bike use rose most in frequent ride categories (3-4 d/wk and 5 d/wk).

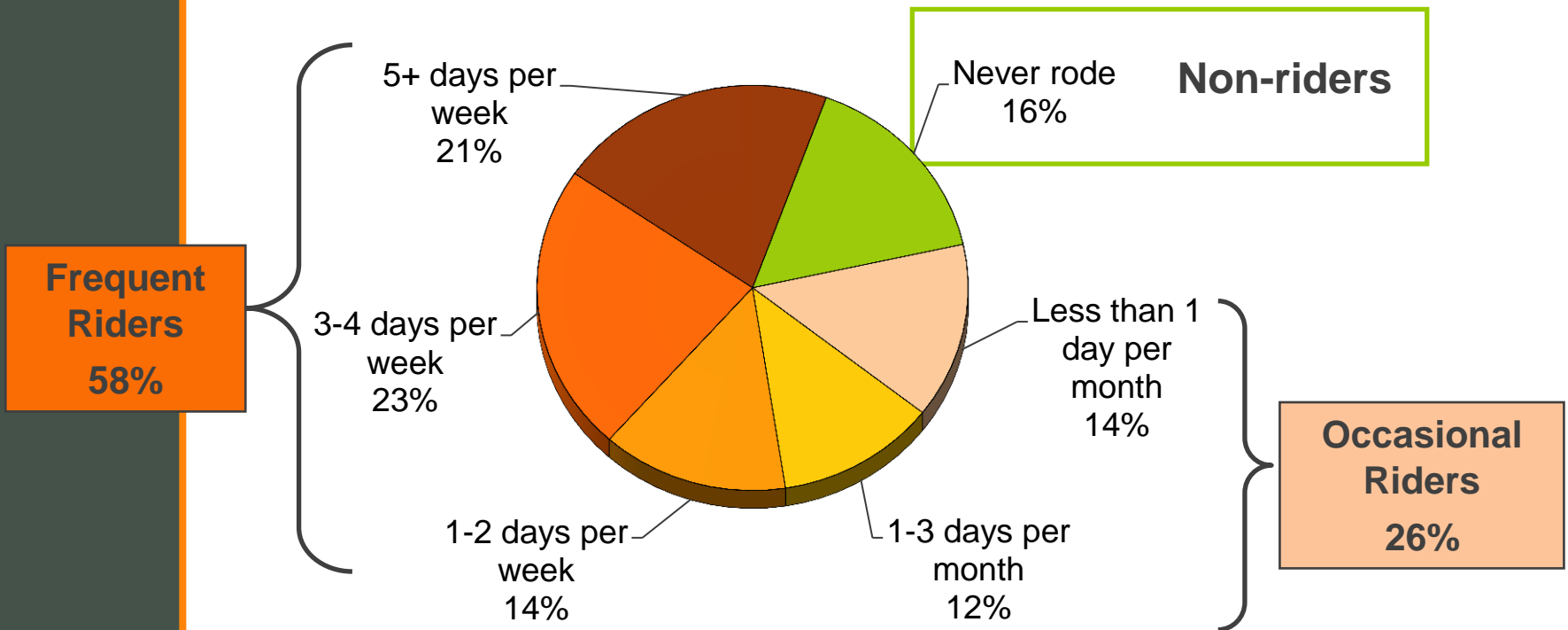


Pre BTW
n = 4,200,

Summer 2013
n = 4,163

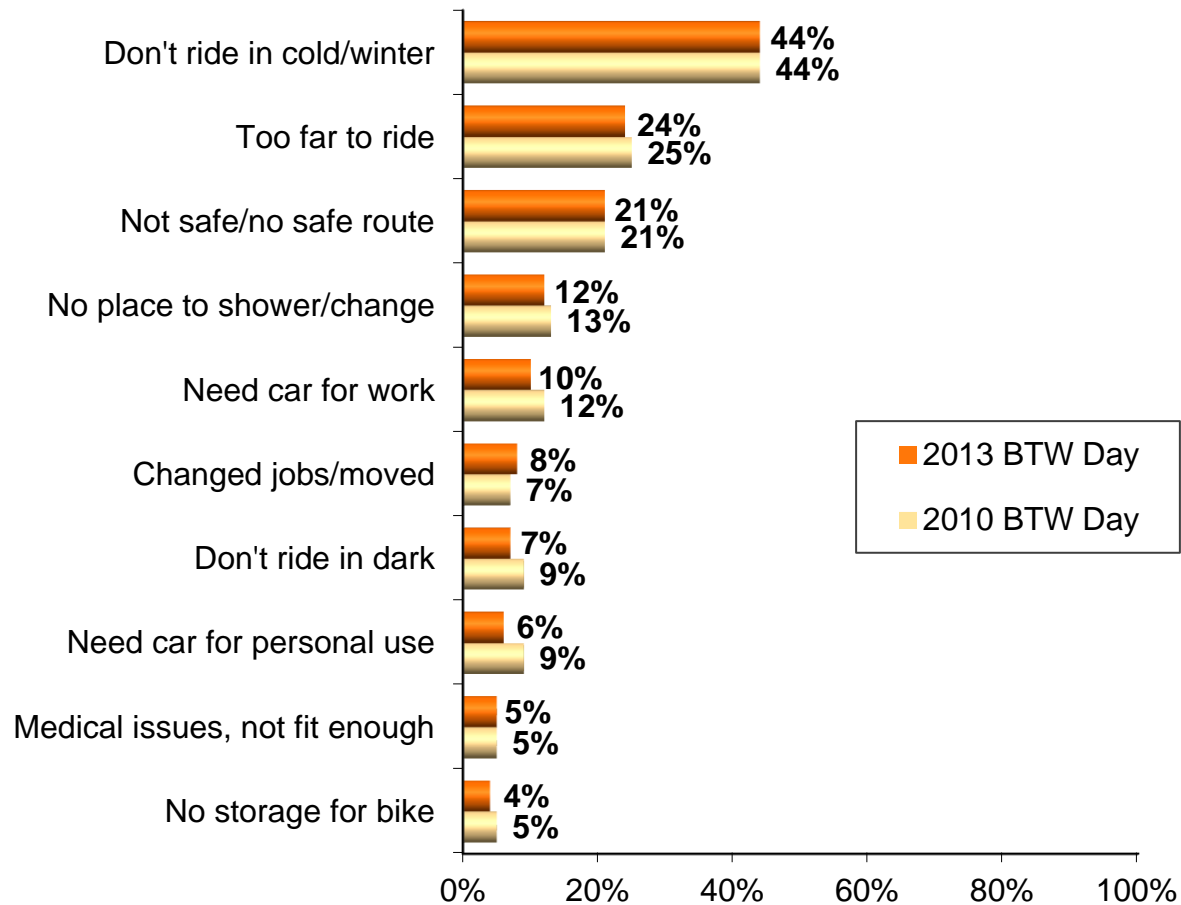
In **Fall 2013**, Riding Declined from Summer Level, but 84% of Respondents Still Biked at Least Occasionally

58% rode 1+ days per week, 26% rode less than 1 day per week; 16% never rode in fall 2013



Primary **Barriers** to Continued Bike Use were Cold Weather, Distance, and Safety Concerns

44% of respondents who didn't ride to work during fall 2013 said they didn't like to ride in cold weather, 24% said they lived too far from work to ride to work regularly, 21% cited safety issues.



2013 BTW
n = 2,444

2010 BTW
n = 1,802

Multiple responses
permitted

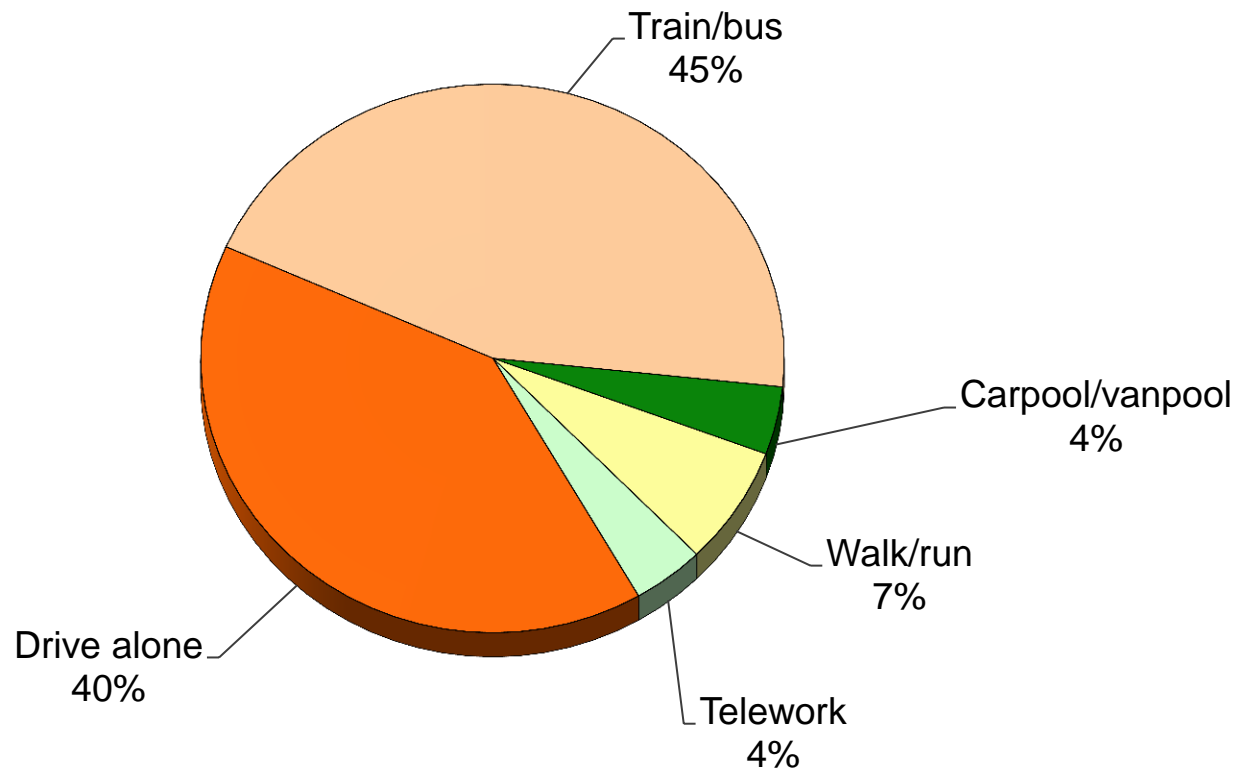
Q6 Why do you not ride your bicycle to work or not ride more often now?

On Days they Don't Bike to Work, 40% of Respondents Drive Alone; 45% Ride a Train or Bus

The 2013 drive alone share is lower than the 48% share measured in the 2010 BTWD Survey; transit and telework use have increased

Used
Capital
Bikeshare
to commute
to or from
work during
the past year

15%



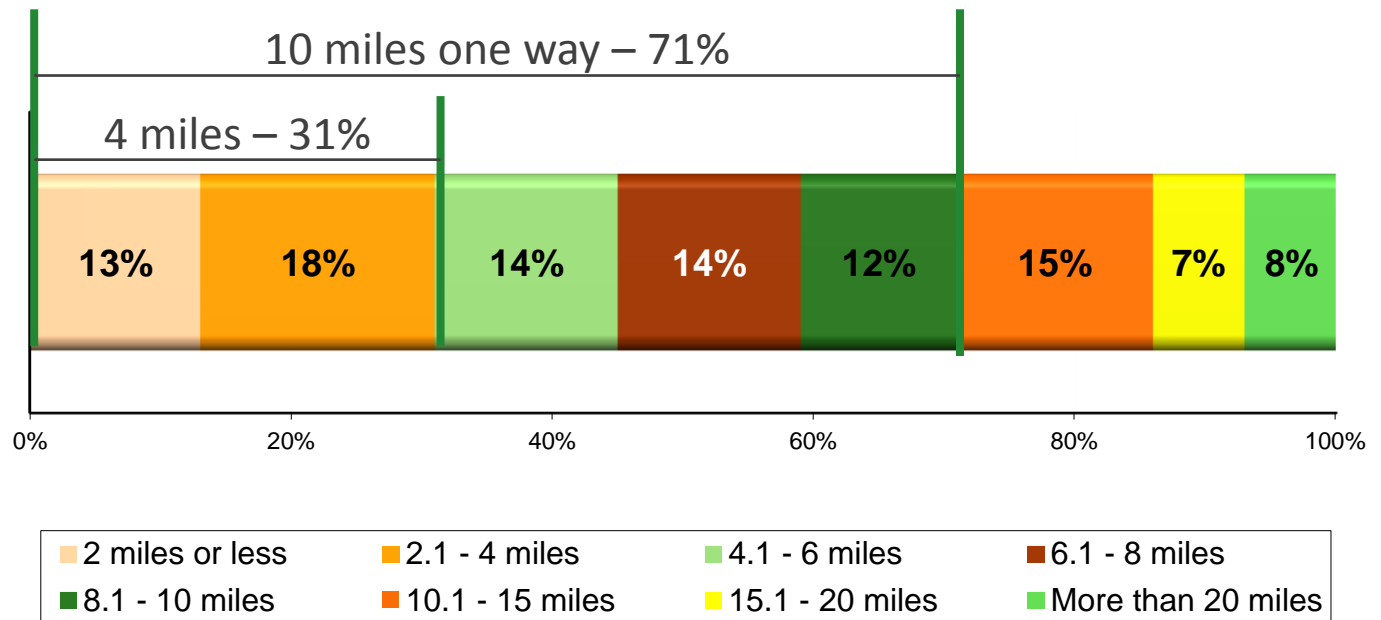
Q7 On days you do not ride your bicycle, how do you usually commute to work? (If you use more than one method, check the one you use MOST OFTEN)

Q11 Have you used Capital Bikeshare to commute to or from work within the past 12 months?

n = 4,232

Respondents Travel an Average of **9.2 Miles** One-way to Work

31% live within 4 miles of work and 71% live within 10 miles.
15% commute more than 15 miles to work.



Average regional distance

All commuters: 16.0 miles

Bike commuters: 4.6 miles

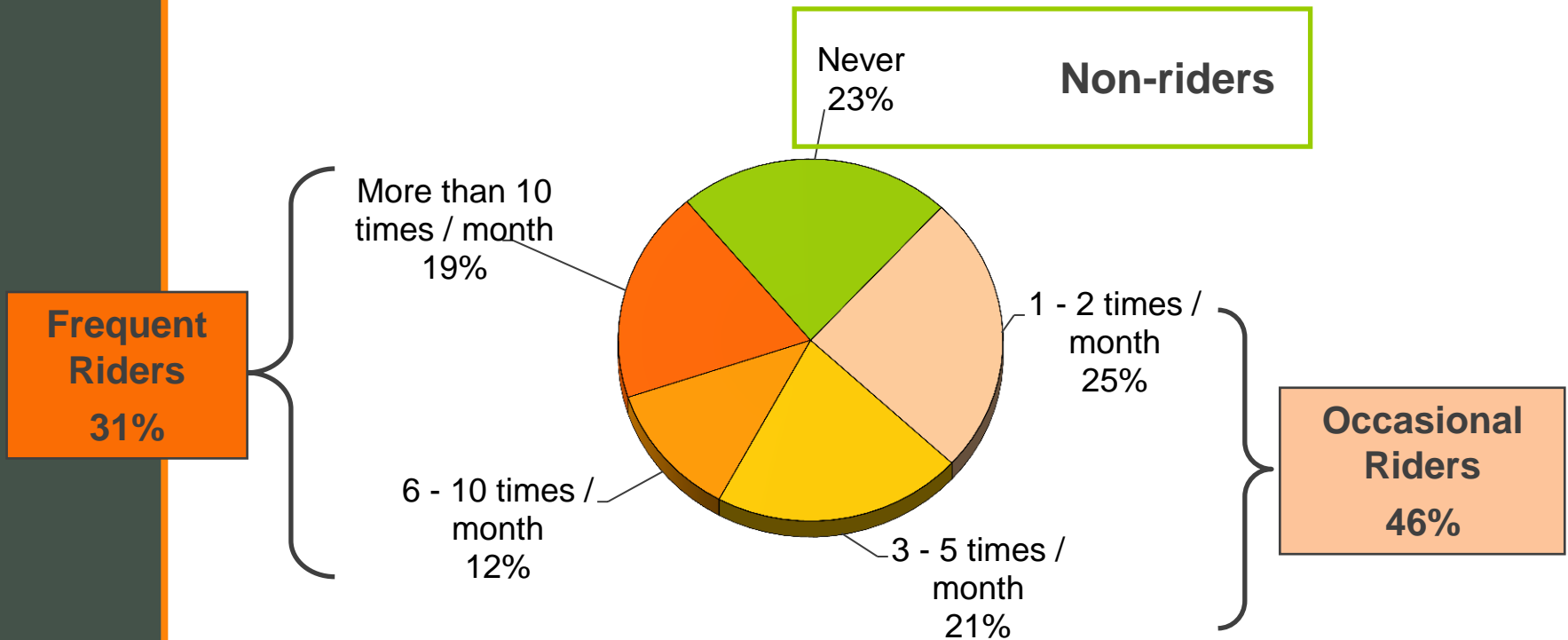
2013 SOC

n = 4,114

Q8 How many miles do you travel from your home to work (one-way)?

More than Three-quarters of Respondents Rode a Bike for a **Non-Commute** Trip Last Month

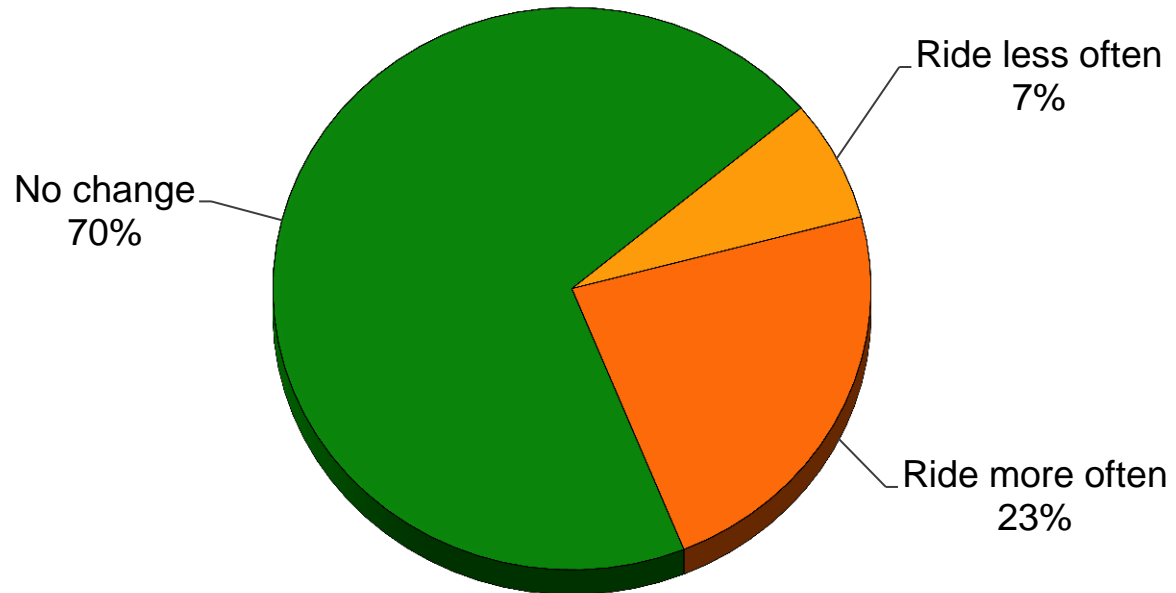
31% were frequent riders (6 or more times); 46% rode 1 to 5 times; 23% didn't ride any days.



Q9 In the past month, how many times did you ride your bicycle for a trip other than getting to or from work, such as trips for errands, shopping, social visits, meetings, or personal appointments? (Please also exclude trips you made SOLELY for exercise or recreation)

23% Increased Use of Bicycle for **Non-Commute Trips** Since their First BTW Day

23% of respondents said they ride more often now for non-work trips than before they first participated in BTW; 7% ride less often; and 70% made no change in riding



Q11 Do you ride your bicycle for non-commute trips more often, less often, or about same as before you first participated in a Bike-to-Work Day event?



Questions?

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