

# Alameda CTC *Get Rolling*/BTWD Research

Targeting Deck

Prepared for  
Alameda County Transportation Commission  
(ACTC)



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**DRAFT 1/28/2011**

# Methodology

- ▶ Telephone survey of adult residents of Alameda County
- ▶ 400 completed interviews
- ▶ Random-digit-dial methodology; both landline & cellular phones
- ▶ Margin of error  $\pm 4.9\%$
- ▶ Conducted November 30-December 5, 2010
- ▶ Interviews conducted by trained, professional interviewers
- ▶ Survey conducted in English, Spanish and Cantonese
- ▶ Oversample used to capture adequate interviews from Eastern portion of County, results weighted to reflect true population distribution

*As with any opinion research, the release of selected figures from this report without the analysis that explains their meaning would be damaging to EMC. Therefore, EMC reserves the right to correct any misleading release of this data in any medium through the release of correct data or analysis.*

*Please note that due to rounding, percentages may not add up to exactly 100%*



# Biking Concerns

# Biking Concerns Scale

Following is a list of reasons some people give for not riding their bicycles to work, school and the other places they go regularly. Whether or not you regularly ride your bicycle to get where you are going, please indicate how important of a factor each one is for you personally when considering riding a bike. **Please rate on a scale of 1 to 7, 1 being Not Important & 7 being Extremely Important.**

## Barriers to Biking

11. Don't want to arrive at your destination sweaty
12. Don't want to arrive at your destination with messy hair or flat hair
13. Don't want to carry a change of clothes
14. No place to shower at your destination
15. No safe place to park bike at destination
16. Not confident in your bike riding ability
17. Not in good enough shape
18. Worried about cars on the road
19. Need to have access to a car at some point during the day
20. You have to carry a lot of stuff
21. The places you regularly go are too far away to ride
22. Don't want to ride your bike alone
23. Poor road and pavement conditions
24. Don't know the best way to get where you are going by bike
25. Not enough bike lanes or bike-safe streets on your route
26. Biking takes too much time
27. Fear of a flat tire or other equipment failure
28. Fear of bad weather
29. Inability to take a bike on BART during commute hours
30. Worried about getting home quickly in an emergency
31. Worried about my personal safety



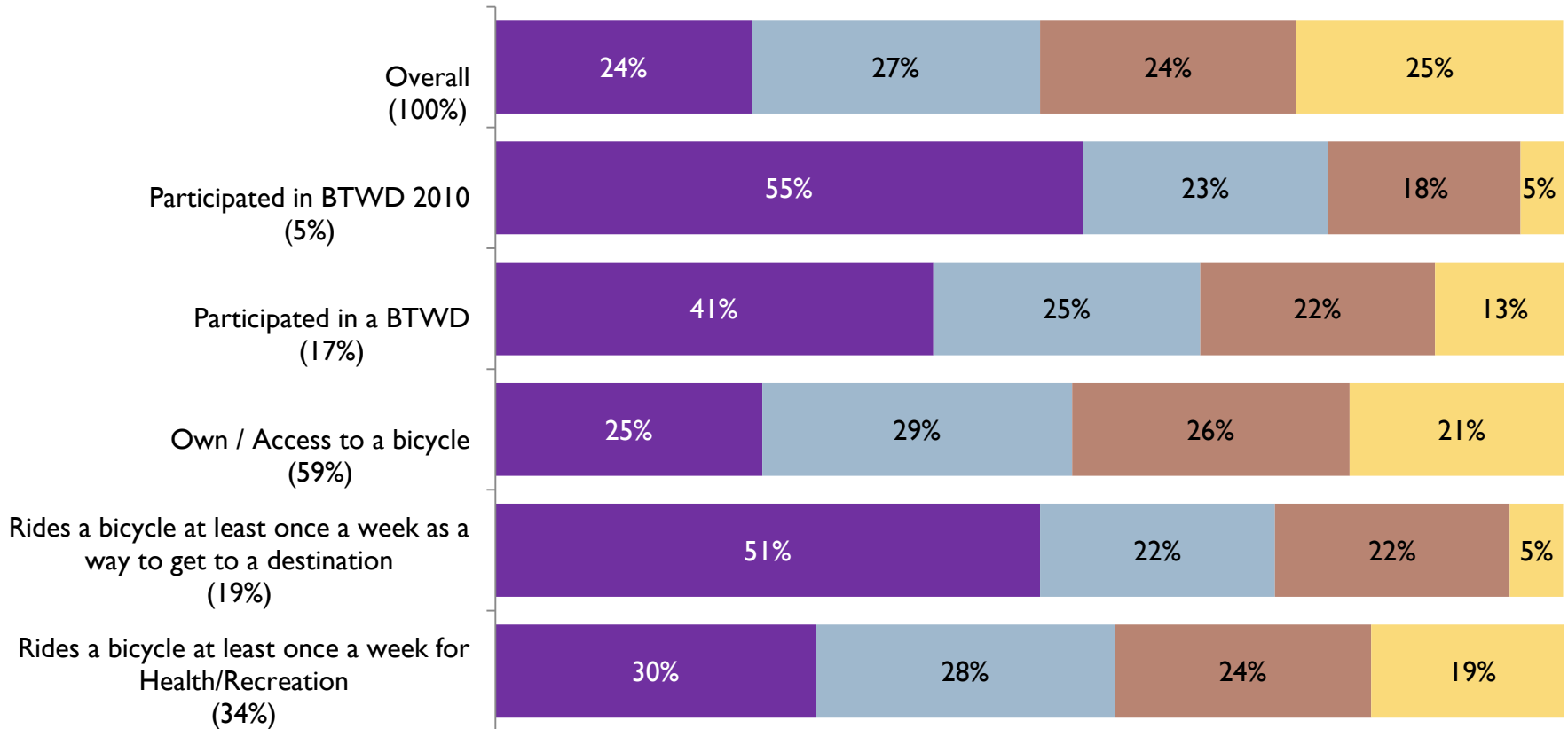
## Using the scale from Q11 - Q31

1 through 5 – Not Concerned  
 6 & 7 – Concerned  
 Each Individual can have 0-21 concerns:  
Minimum – 0 Concerns  
Maximum – 21 Concerns

Concerns	%
0-3 Concerns	24%
4-7 Concerns	27%
8-12 Concerns	24%
13-21 Concerns	25%

# Participation / Ridership Based on Biking Concerns

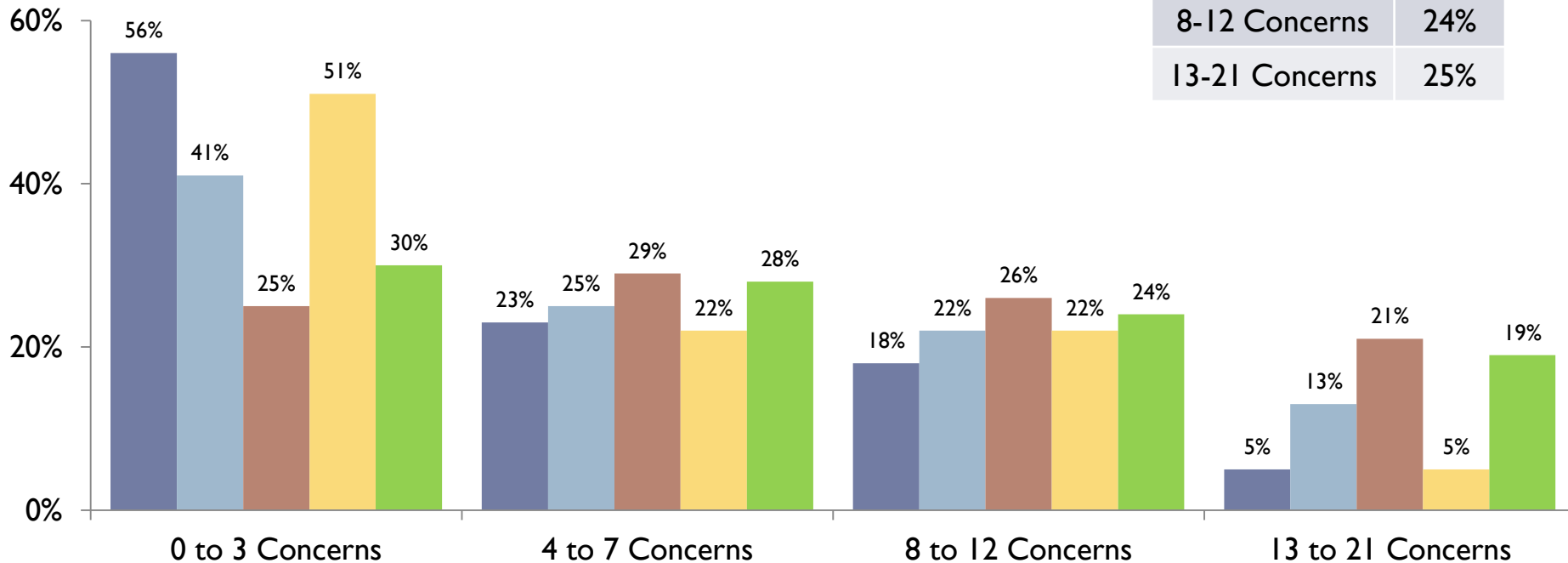
■ 0-3 Concerns    
 ■ 4-7 Concerns    
 ■ 8-12 Concerns    
 ■ 13-21 Concerns



# Participation / Ridership Based on Biking Concerns

- Participated in BTWD 2010 (5%)
- Participated in a BTWD (17%)
- Own / Access to a bike (59%)
- Rides a bicycle at least once a week as a way to get to a destination (19%)
- Rides a bicycle at least once a week for Health/Recreation (34%)

Concerns	%
0-3 Concerns	24%
4-7 Concerns	27%
8-12 Concerns	24%
13-21 Concerns	25%

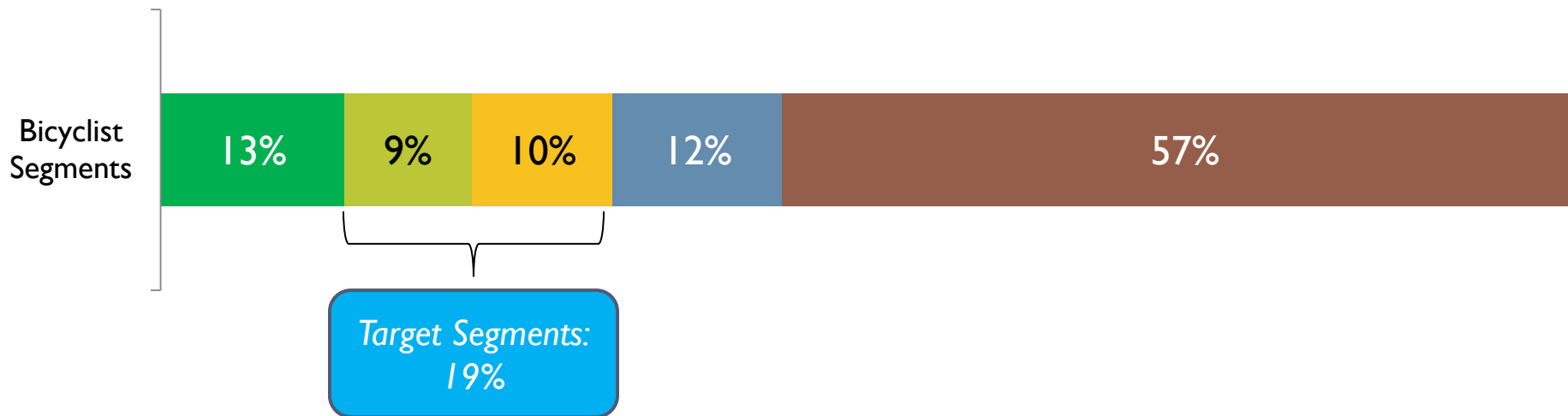




# Targeting

# Bicyclist Segmentation

■ Committed Bicyclists ■ Primary Target ■ Secondary Target ■ Less Likely Bicyclists ■ Non-Bicyclists



**Committed Bicyclists:**

- Currently ride their bikes 3 or more times a week to a destination

**Primary Target:**

- Currently ride their bikes once or twice a week to a destination

**Secondary Target:**

- Currently bike less than once a week to a destination
- Bike for health / recreation
- Have a bike
- Have 8 concerns or less

**Less Likely Bicyclists:**

- Currently bike less than once a week to a destination
- Bike for health / recreation
- Have a bike
- Have 9 or more concerns

**Non-Bicyclists:**

- Do not bike to a destination
- Do not bike for health / recreation
- Do not have a bike



# Segmentation Demographics

Demographic	Survey %	Committed Bicyclists (13%)	Primary Target (9%)	Secondary Target (10%)	Less likely Bicyclists (12%)	Non-Bicyclists (57%)
Male	49%	65%	63%	68%	28%	44%
Female	51%	35%	37%	32%	72%	56%
18-29	18%	31%	19%	12%	15%	16%
30-39	21%	17%	15%	27%	20%	22%
40-49	19%	24%	30%	10%	30%	15%
50-64	28%	26%	32%	38%	24%	28%
65+	14%	2%	4%	12%	11%	19%
Have Kids Under 18	40%	44%	46%	44%	59%	33%
African-American	11%	10%	6%	0%	5%	15%
White	41%	36%	68%	51%	25%	39%
Hispanic	17%	28%	7%	10%	25%	15%
Asian	19%	11%	8%	27%	34%	18%
Other	12%	14%	11%	12%	11%	12%

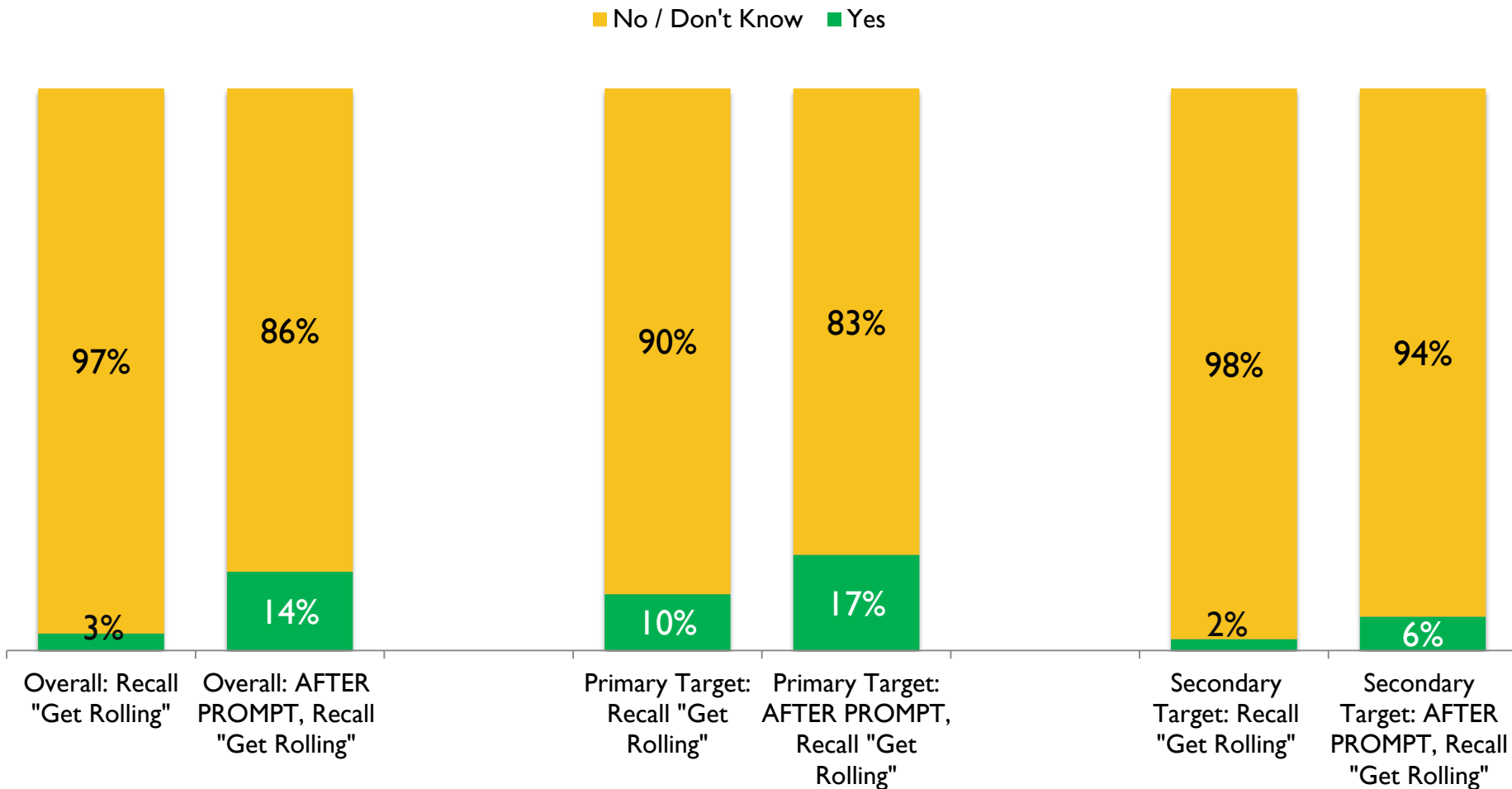
Colored cells indicate an increase that is more than 5 points (Margin of Error) in the Target Group(s) compared to the Overall Population

# Segmentation Demographics

Demographic	Survey %	Committed Bicyclists (13%)	Primary Target (9%)	Secondary Target (10%)	Less likely Bicyclists (12%)	Non-Bicyclists (57%)
North Alameda Co.	43%	67%	51%	34%	20%	42%
Central Alameda Co.	28%	23%	15%	25%	37%	30%
South Alameda Co.	17%	2%	17%	20%	26%	18%
East Alameda Co.	12%	8%	17%	20%	15%	10%
Access to a Car	87%	68%	87%	97%	93%	88%
Goes to Work Outside Home	71%	86%	77%	65%	92%	64%
Mean: Distance to Work	13.49 mi.	11.70 mi.	12.53 mi.	11.53 mi.	16.08 mi.	13.80 mi.
Median: Distance to Work	10.00 mi.	4.52 mi.	9.25 mi.	6.26 mi.	10.88 mi.	10.00 mi.
Goes to School Outside Home	24%	37%	19%	11%	28%	24%
Mean: Distance to School	11.95 mi.	14.11 mi.	11.13 mi.	9.16 mi.	9.03 mi.	12.20 mi.
Median: Distance to School	5.00 mi	4.75 mi.	2.00 mi	2.67 mi.	5.00 mi.	5.00 mi.

Colored cells indicate an increase that is more than 5 points (Margin of Error) in the Target Group(s) compared to the Overall Population

# Target Segments: "Get Rolling" Awareness



# Target Segments' Habits

*In a typical week, how many days would you say you do each of the following?*

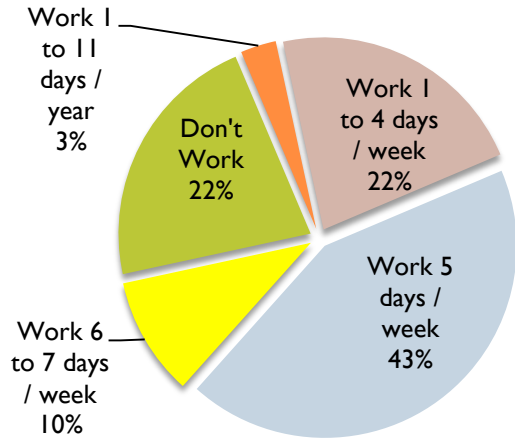
	Mean – days/week (Overall 100%)	Mean - days/week (Primary Target 9%)	Mean - days/week (Secondary Target 10%)
62. Drive a car alone	4.14	4.00	4.83
58. Go to work outside of your home	3.34	3.18	3.16
63. Travel in a car with someone else, whether you are the driver or a passenger	3.21	3.17	3.56
60. Go shopping for food or other household items	2.37	2.31	2.29
61. Take your children to school	2.29	1.59	1.74
59. Go to school	0.87	0.76	0.31
65. Ride BART	0.65	0.73	0.24
70. Ride a stationary bicycle or take a spinning class	0.63	0.68	0.95
64. Ride a bus	0.57	0.61	0.14
66. Take a train other than BART	0.15	0.04	0.02
67. Take a ferry	0.12	0.03	0.02

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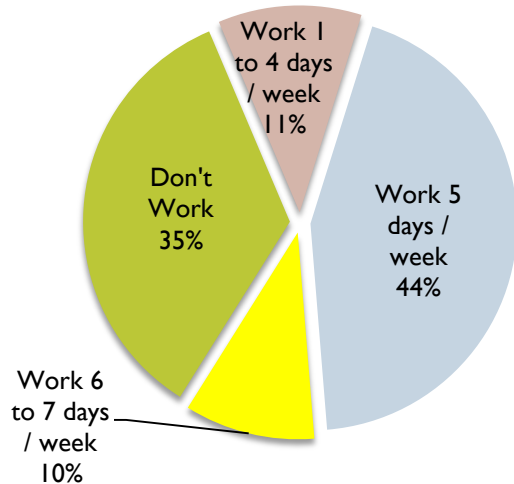
# Target Segments: Workers

In a typical week, how many days would you say you (Q58) Go to work outside of your home? (If any, then respondent works)

**Primary Target**



**Secondary Target**



	Overall (100%)	Primary Target (9%)	Secondary Target (10%)
Those who Work outside their home	71%	78%	65%

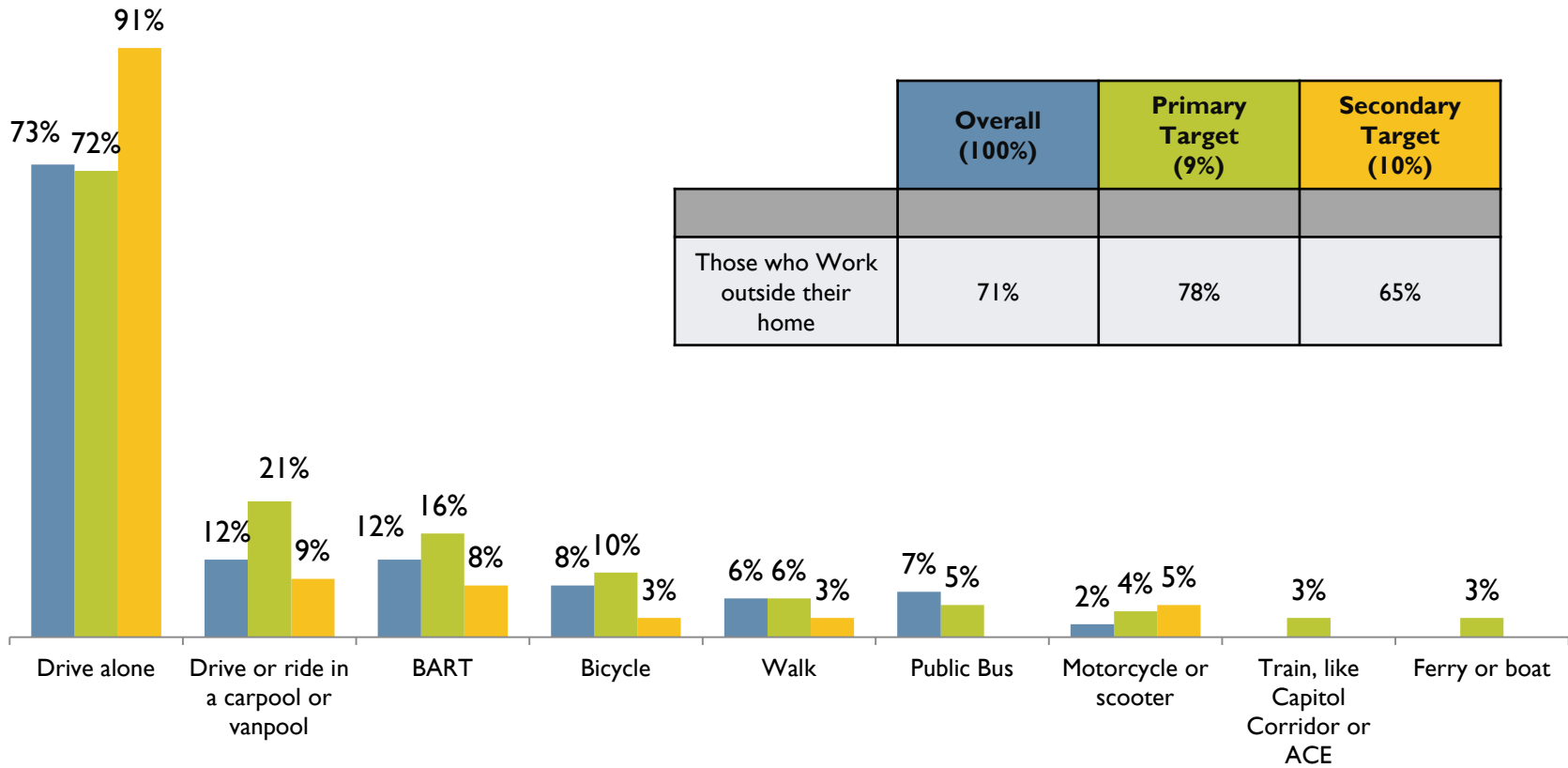
Access at work to changing area, shower, or bike racks / secure bike room or locker

Of those who go to work, access to...	Overall (100%)	Primary Target (9%)	Secondary Target (10%)
	n=273	n=32	n=26
All 3	19%	24%	26%
2 of 3	25%	14%	26%
At least 1	29%	20%	16%
None	28%	42%	31%

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# Target Segments: Workers

And what mode or modes of transportation do you usually use to get to work? If you usually use more than one please list them all.

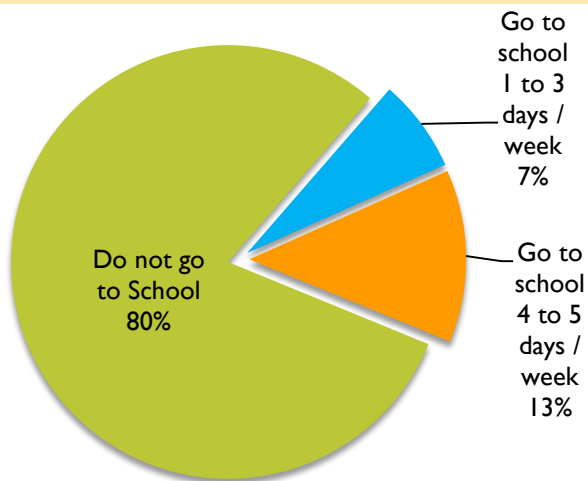


	Overall (100%)	Primary Target (9%)	Secondary Target (10%)
Those who Work outside their home	71%	78%	65%

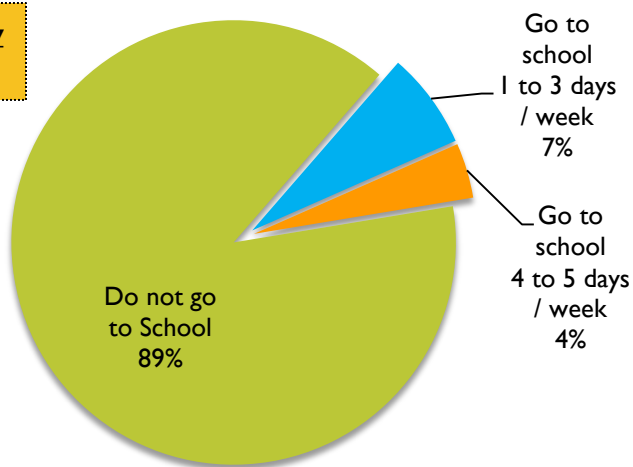
# Target Segments: Those Who Go To School

In a typical week, how many days would you say you (Q58) Go to school outside of your home? (If any, then respondent goes to school)

**Primary Target**



**Secondary Target**



	Overall (100%)	Primary Target (9%)	Secondary Target (10%)
Those who Go to School outside their home	25%	20%	11%

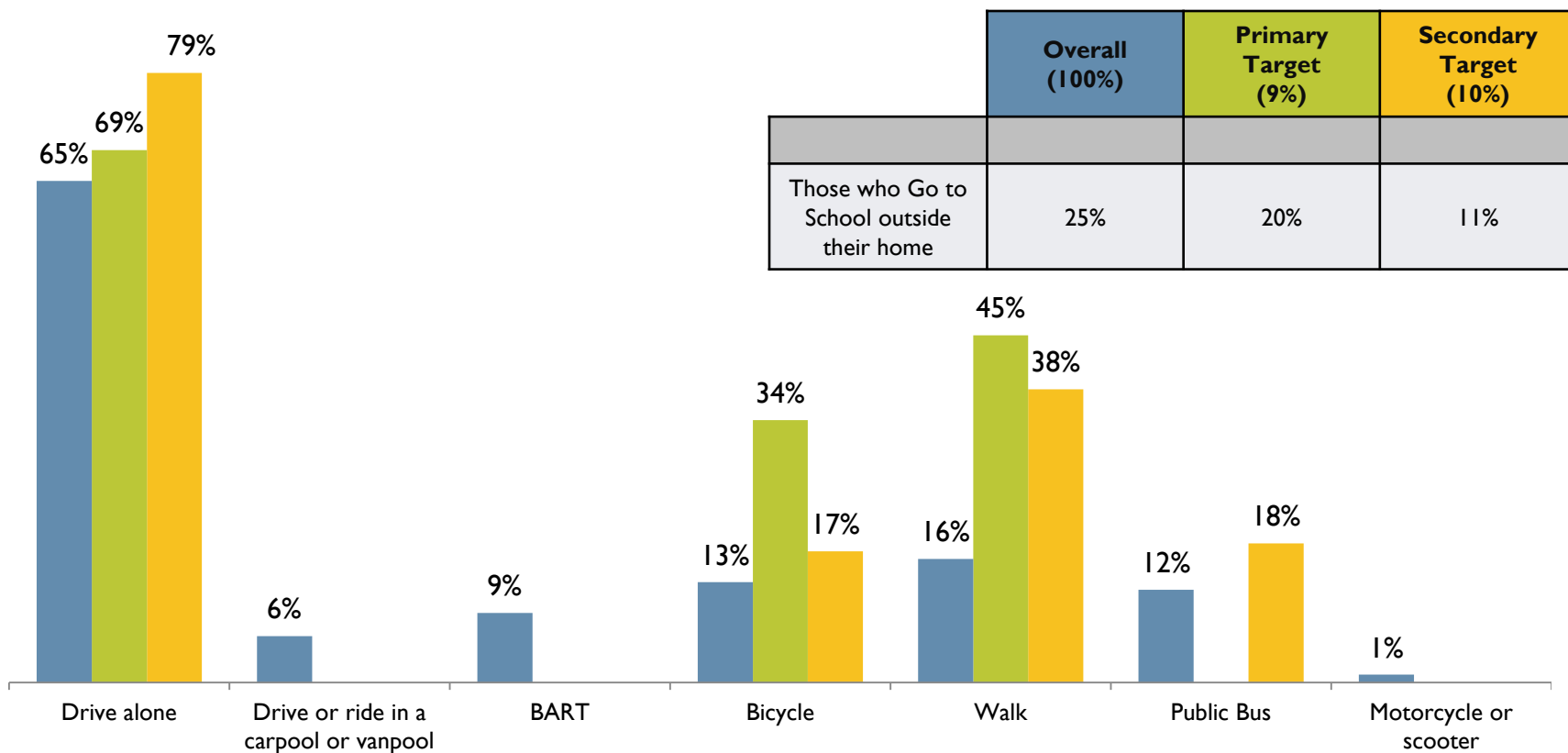
Access at school to changing area, shower, or bike racks / secure bike room or locker

Of those who go to school, access to...	Overall (100%)	Primary Target (9%)	Secondary Target (10%)
	n=82	n=6	n=5
All 3	10%	0%	0%
2 of 3	32%	53%	43%
At least 1	27%	47%	57%
None	31%	0%	0%

Colored cells indicate an increase that is more than 5 points (Margin of Error) in the Target Group(s) compared to the Overall Population

# Target Segments: Those Who Go To School

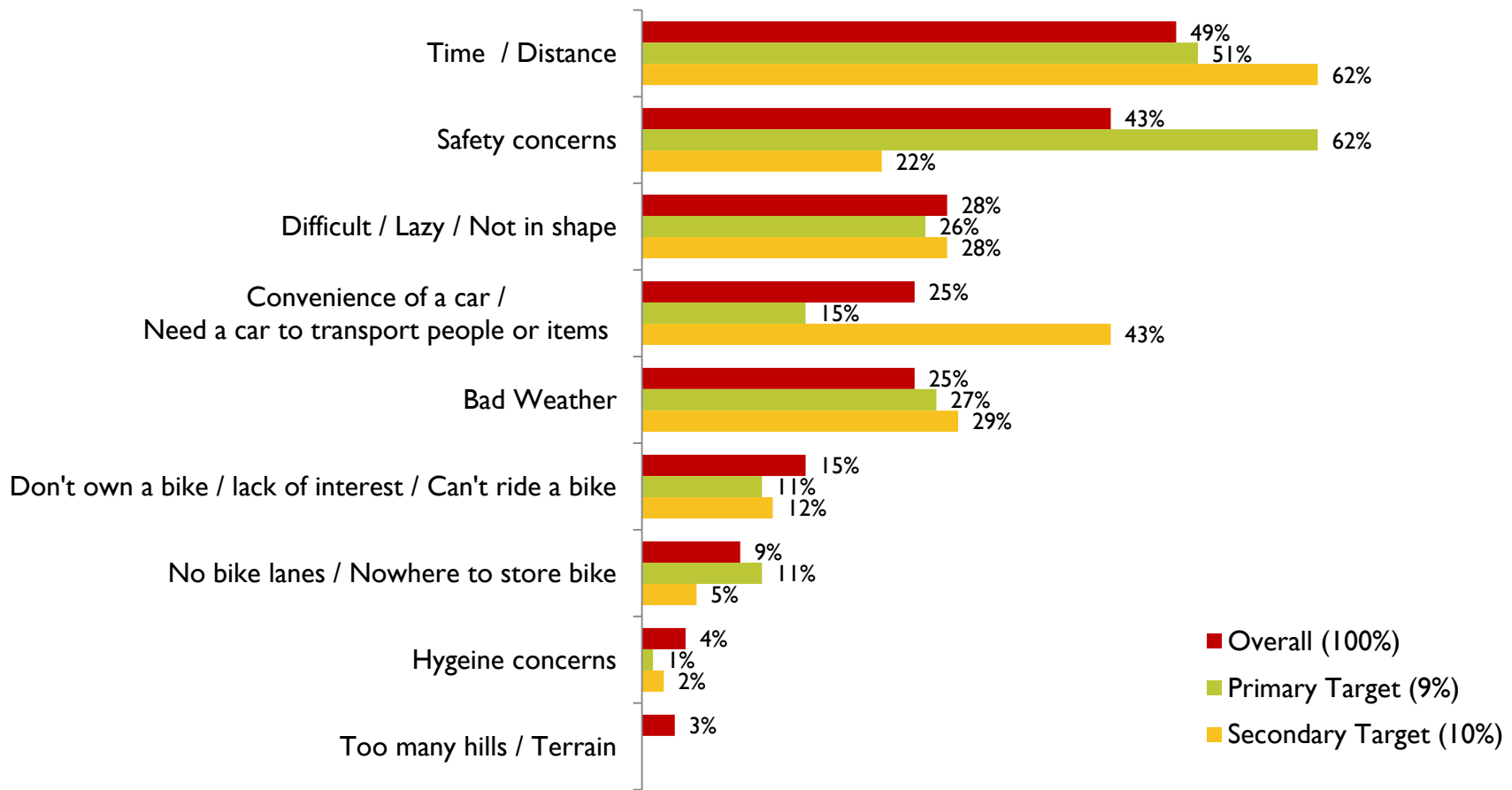
And what mode or modes of transportation do you usually use to get to school? If you usually use more than one please list them all.





# Target Segments: Reasons Not to Ride a Bike

Thinking about riding a bicycle to get to a destination, what would you say are the top three reasons people do not ride their bicycles as a means of getting places more often? (Open-ended)



# Target Segments: Barriers to Biking

I'm going to read you a list of reasons some people give for not riding their bicycles to work, school and the other places they go regularly. Please tell me for each one how important of a factor it is for you personally when considering riding a bicycle. **Please use a scale from 1 to 7, where 1 means it's not at all important, and 7 means it's extremely important.**

*Colored cells indicate an increase that is more than 5 points (Margin of Error) in the Target Group(s) compared to the Overall Population*

	Mean (Overall 100%)	Mean (Primary Target 9%)	Mean (Secondary Target 10%)
	n=400	n=35	n=38
18. Worried about cars on the road	5.33 *	4.83 *	5.09 *
28. Fear of bad weather	5.12 *	4.54 *	4.82 *
21. The places you regularly go are too far away to ride	5.01 *	4.26	4.75 *
25. Not enough bike lanes or bike-safe streets on your route	5.01	4.53 *	4.46
31. Worried about my personal safety	5.00	4.17	4.15
30. Worried about getting home quickly in an emergency	4.94	3.98	4.39
20. You have to carry a lot of stuff	4.80	4.20	4.16
19. Need to have access to a car at some point during the day	4.72	3.70	4.18
23. Poor road and pavement conditions	4.61	4.07	3.86
11. Don't want to arrive at your destination sweaty	4.57	3.61	4.24
15. No safe place to park a bike at your destination	4.48	3.89	3.63
29. Inability to take a bike on BART during commute hours	4.18	3.56	2.80
26. Biking takes too much time	4.09	1.04	3.62
13. Don't want to carry a change of clothes	4.06	3.10	3.20
27. Fear of a flat tire or other equipment failure	4.03	3.84	2.54
14. No place to shower at your destination	3.97	4.27	3.57
17. Not in good enough shape	3.85	3.30	2.99
12. Don't want to arrive at your destination with messy hair or flat hair	3.62	2.76	2.49
24. Don't know the best way to get where you are going by bike	3.47	2.74	2.27
16. Not confident in your bike riding ability	3.37	2.82	2.40
22. Don't want to ride your bike alone	3.22	2.39	2.12



*\*Top Three Responses*

# Target Segments: Ways to Encourage Biking

Now I'm going to read you a list of things that might make it easier for people to ride their bicycles as transportation.

For each one, please tell me if you believe it would make you much more likely to ride your bicycle more often for transportation, somewhat more likely to ride your bicycle more often for transportation, or if it would not make a difference in your decision.

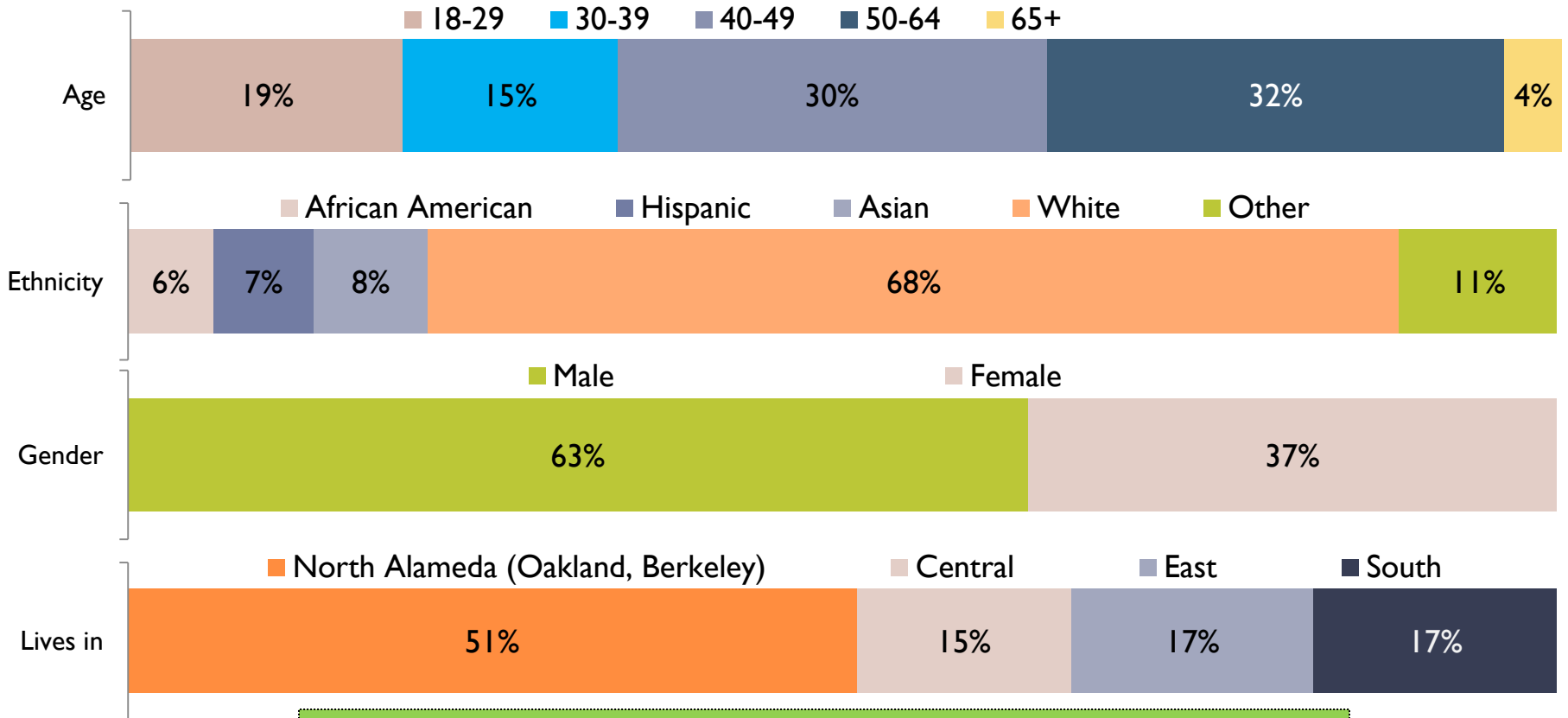
	Much More Likely to Bike (Overall 100%)	Much More Likely to Bike (Primary Target 9%)	Much More Likely to Bike (Secondary Target 10%)
34. More places to ride away from cars, like on bike paths	56% *	57% *	65% *
46. Safety improvements at large intersections	54% *	53%	45% *
35. More secure bike parking at the places you go	51% *	60% *	39%
32. More dedicated bike lanes	49%	58% *	47% *
36. More secure bike parking at transit stations	47%	56%	28%
33. Wider bike lanes	45%	52%	38%
42. Allowing bicycles on all forms of public transit all the time	42%	41%	25%
45. An easy way to find the best bike route to the places you go	37%	30%	37%
38. Access to a shared car at your destination for use while you are there	37%	27%	33%
41. Slower moving cars on the streets	32%	33%	14%
40. Incentives from your work or school, like contests or cash giveaways	29%	20%	32%
37. A shower and changing area at your destination	28%	42%	33%
43. Access to bicycle safety and maintenance classes	27%	26%	15%
39. Organized bicycling groups from near where you live to your destination	26%	16%	20%
44. Access to information about bicycle commuting equipment	24%	12%	10%

*\*Top Three Responses*

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# Primary Target Demographics

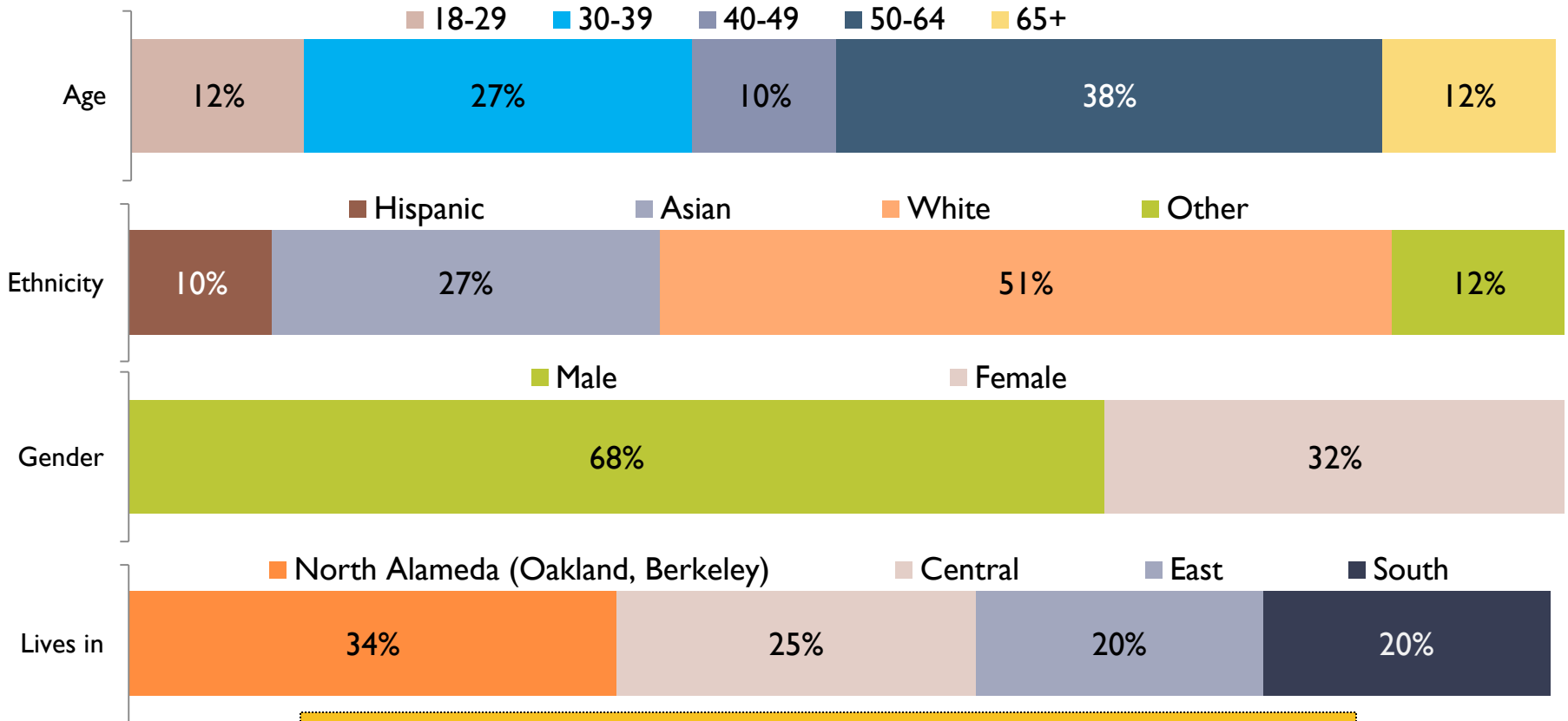
Primary Target (9%)



***Primary Target Typical Profile:***

Age 40-64; Male; White; Lives in North Alameda County

# Secondary Target Demographics



**Secondary Target Typical Profile:**  
 Age 50-64; Male; White; Throughout Alameda County



# Targeting & Messaging

# Primary Target (9%): Targeting & Messaging

## **Primary Target Typical Profile:**

Age 40-64; Male; White; Lives in North Alameda County

## **Primary Target Habits:**

- More Likely to ride transit
  - More Likely to work
  - More Likely to have kids

## **Primary Target Messaging:**

- Top concern about bicycling is safety
- Most attracted to secure bike parking and bike paths & lanes

# Secondary Target (10%): Targeting & Messaging

## **Secondary Target Typical Profile:**

Age 50-64; Male; White; Scattered Throughout Alameda County

## **Secondary Target Habits:**

- Drive Alone; Less likely to work

## **Secondary Target Messaging:**

- Top concern about bicycling are time / distance and having access to a car
  - Most attracted to safety improvements and bike paths & lanes





# Regional Data

# Regional Demographics

Demographic	Survey %	Central Alameda Co. (28%)	East Alameda Co. (12%)	North Alameda Co. (43%)	South Alameda Co. (17%)
Male	49%	45%	49%	53%	46%
Female	51%	55%	51%	47%	54%
18-29	18%	24%	2%	18%	21%
30-39	21%	14%	21%	23%	28%
40-49	19%	17%	35%	15%	18%
50-64	28%	25%	35%	31%	23%
65+	14%	21%	7%	13%	9%
Have Kids Under 18	40%	45%	45%	32%	43%
African-American	11%	7%	1%	19%	4%
White	41%	33%	60%	42%	37%
Hispanic	17%	30%	7%	13%	11%
Asian	19%	20%	20%	13%	32%
Other	12%	10%	11%	13%	16%

Colored cells indicate an increase that is more than 5 points (Margin of Error) in the Regional Group(s) compared to the Overall Population



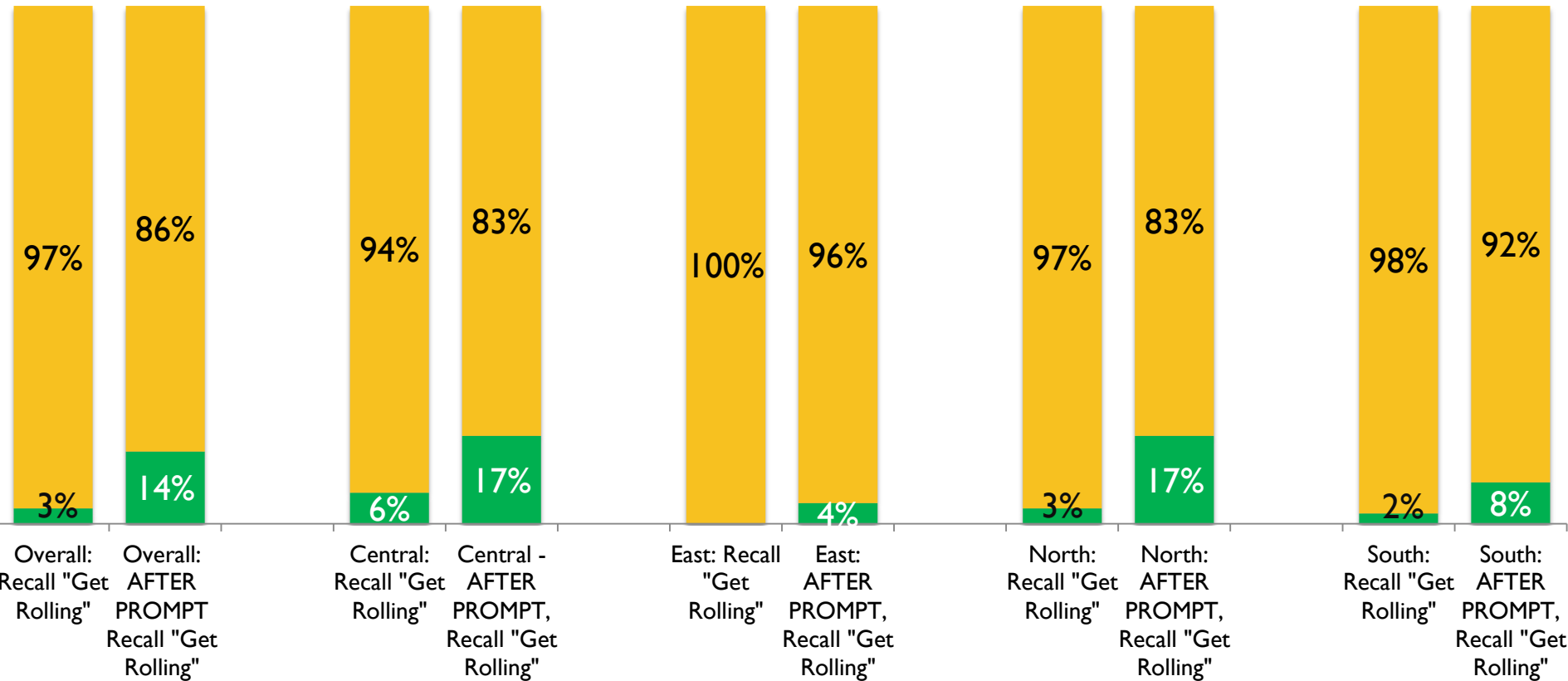
# Regional Demographics

Demographic	Survey %	Central Alameda Co. (28%)	East Alameda Co. (12%)	North Alameda Co. (43%)	South Alameda Co. (17%)
Access to a Car	87%	88%	95%	79%	98%
Goes to Work Outside Home	71%	61%	78%	79%	65%
Mean: Distance to Work	13.49 mi.	14.73 mi.	14.58 mi.	11.92 mi.	15.38 mi.
Median: Distance to Work	10.00 mi.	10.00 mi.	10.00 mi.	7.00 mi.	10.00 mi.
Goes to School Outside Home	24%	26%	15%	22%	33%
Mean: Distance to School	11.95 mi.	8.92 mi.	11.69 mi.	15.06 mi.	10.40 mi.
Median: Distance to School	5.00 mi	5.00 mi.,	8.29 mi.	5.00 mi.	3.00 mi.

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# Regions: "Get Rolling" Awareness

■ No / Don't Know ■ Yes



# Residents' Habits by Region

In a typical week, how many days would you say you do each of the following? **MEAN SHOWN: days/week**

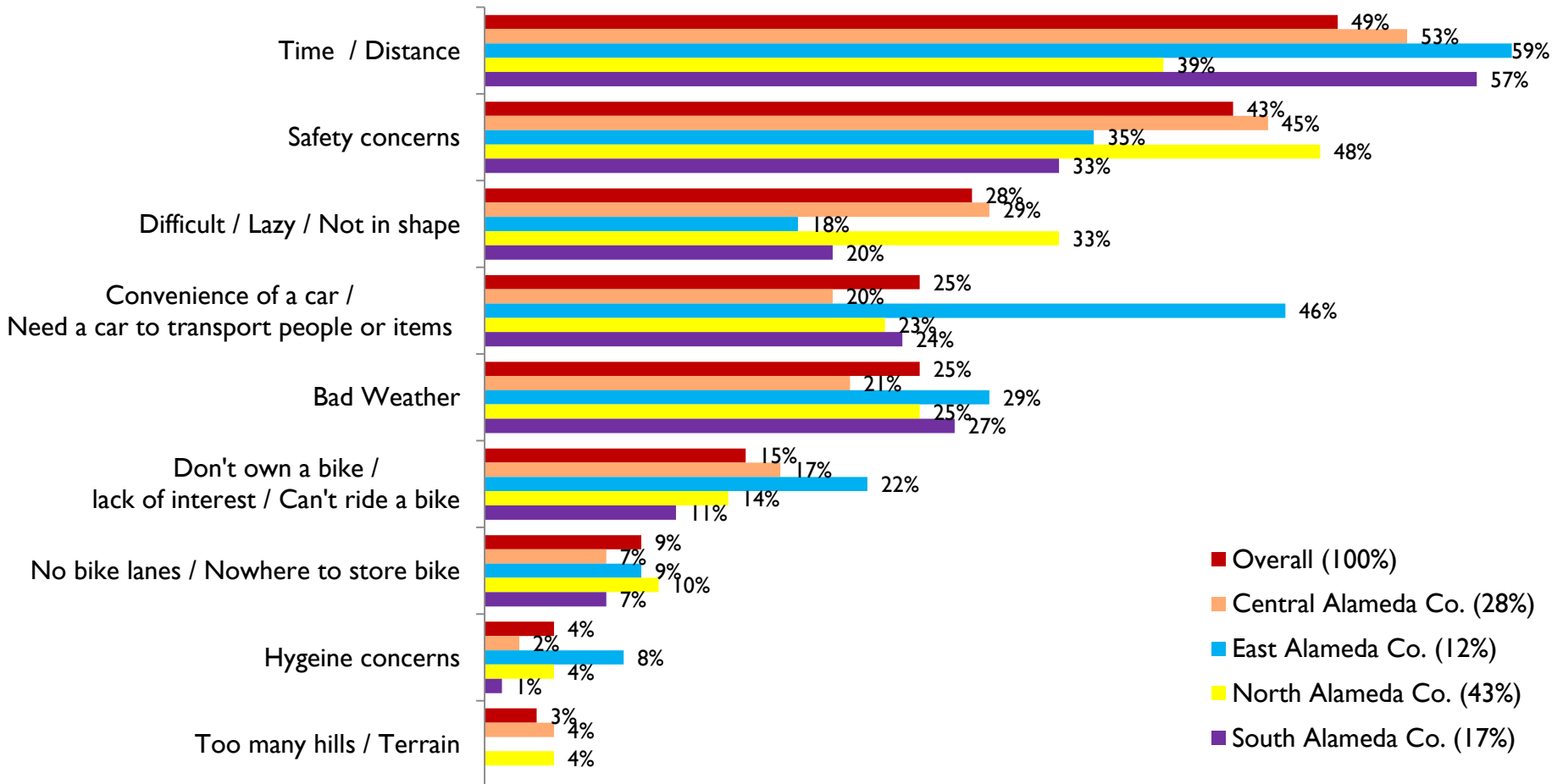
	Overall (100%)	Central Alameda Co. (28%)	East Alameda Co. (12%)	North Alameda Co. (43%)	South Alameda Co. (17%)
62. Drive a car alone	4.14 *	4.20 *	4.78 *	3.69 *	4.72 *
58. Go to work outside of your home	3.34 *	2.80 *	3.54 *	3.75 *	3.09 *
63. Travel in a car with someone else, whether you are the driver or a passenger	3.21 *	3.53 *	2.74 *	2.95 *	3.68 *
60. Go shopping for food or other household items	2.37	2.29	2.43	2.43	2.30
61. Take your children to school	2.29	2.80 *	2.21	2.10	2.00
59. Go to school	0.87	1.06	0.43	0.76	1.13
68. Ride a bicycle for health/recreation	0.83	0.79	0.73	0.97	0.59
69. Ride a bicycle as a way to get to a destination	0.66	0.46	0.54	1.02	0.18
65. Ride BART	0.65	0.39	0.27	1.05	0.35
70. Ride a stationary bicycle or take a spinning class	0.63	0.76	0.78	0.55	0.50
64. Ride a bus	0.57	0.40	0.15	0.99	0.18
66. Take a train other than BART	0.15	0.16	0.11	0.21	0.02
67. Take a ferry	0.12	0.03	0.01	0.24	0.01

Colored cells indicate an increase in the Region(s) compared to the Overall Population

\*Top Three Responses

# Regions: Reasons Not to Ride a Bike

Thinking about riding a bicycle to get to a destination, what would you say are the top three reasons people do not ride their bicycles as a means of getting places more often? (Open-ended)



# Regions: Barriers to Biking

I'm going to read you a list of reasons some people give for not riding their bicycles to work, school and the other places they go regularly. Please tell me for each one how important of a factor it is for you **personally** when considering riding a bicycle. Please use a scale from 1 to 7, where 1 means it's not at all important, and 7 means it's extremely important.

	Mean (Overall 100%)	Central Alameda Co. (28%)	East Alameda Co. (12%)	North Alameda Co. (43%)	South Alameda Co. (17%)
	n=400	n=112	n=48	n=171	n=68
18. Worried about cars on the road	5.33 *	5.77 *	5.34 *	4.99 *	5.44 *
28. Fear of bad weather	5.12 *	5.54 *	5.36 *	4.88	4.89
21. The places you regularly go are too far away to ride	5.01 *	4.95	5.00	4.88	5.44 *
25. Not enough bike lanes or bike-safe streets on your route	5.01 *	5.12	4.79	5.08 *	4.83
31. Worried about my personal safety	5.00	5.14	4.68	4.95 *	5.11
30. Worried about getting home quickly in an emergency	4.94	5.50 *	5.11	4.33	5.42
20. You have to carry a lot of stuff	4.80	4.94	5.29 *	4.62	4.68
19. Need to have access to a car at some point during the day	4.72	5.37	4.55	4.24	4.98 *
23. Poor road and pavement conditions	4.61	4.69	4.61	4.54	4.65
11. Don't want to arrive at your destination sweaty	4.57	4.83	4.69	4.33	4.69
15. No safe place to park a bike at your destination	4.48	4.71	3.51	4.55	4.59
29. Inability to take a bike on BART during commute hours	4.18	4.43	3.92	4.25	3.74
26. Biking takes too much time	4.09	4.26	4.04	3.87	4.38
13. Don't want to carry a change of clothes	4.06	4.21	3.81	4.05	3.99
27. Fear of a flat tire or other equipment failure	4.03	4.60	3.86	3.61	4.25
14. No place to shower at your destination	3.97	4.23	3.86	3.83	3.94
17. Not in good enough shape	3.85	4.32	3.62	3.69	3.65
12. Don't want to arrive at your destination with messy hair or flat hair	3.62	3.79	3.80	3.43	3.68
24. Don't know the best way to get where you are going by bike	3.47	3.80	3.06	3.29	3.68
16. Not confident in your bike riding ability	3.37	3.58	3.25	3.25	3.43
22. Don't want to ride your bike alone	3.22	3.76	3.05	2.96	3.12

Colored cells indicate in the Region(s) compared to the Overall Population

\*Top Three Responses



# Regions: Ways to Encourage Biking

Now I'm going to read you a list of things that might make it easier for people to ride their bicycles as transportation.

For each one, please tell me if you believe it would make you much more likely to ride your bicycle more often for transportation, somewhat more likely to ride your bicycle more often for transportation, or if it would not make a difference in your decision.

	Much More Likely to Bike (Overall 100%)	Central Alameda Co. (28%)	East Alameda Co. (12%)	North Alameda Co. (43%)	South Alameda Co. (17%)
34. More places to ride away from cars, like on bike paths	56% *	52% *	54% *	58% *	58% *
46. Safety improvements at large intersections	54% *	55% *	51% *	53% *	54% *
35. More secure bike parking at the places you go	51% *	53% *	47% *	51% *	52% *
32. More dedicated bike lanes	49%	50%	47% *	49%	49%
36. More secure bike parking at transit stations	47%	50%	40%	47%	44%
33. Wider bike lanes	45%	41%	43%	47%	47%
42. Allowing bicycles on all forms of public transit all the time	42%	42%	42%	39%	48%
45. An easy way to find the best bike route to the places you go	37%	31%	39%	39%	43%
38. Access to a shared car at your destination for use while you are there	37%	36%	40%	33%	45%
41. Slower moving cars on the streets	32%	32%	27%	33%	33%
40. Incentives from your work or school, like contests or cash giveaways	29%	33%	28%	26%	33%
37. A shower and changing area at your destination	28%	23%	28%	31%	30%
43. Access to bicycle safety and maintenance classes	27%	30%	25%	26%	26%
39. Organized bicycling groups from near where you live to your destination	26%	25%	26%	23%	32%
44. Access to information about bicycle commuting equipment	24%	27%	19%	20%	33%

*\*Top Three Responses*

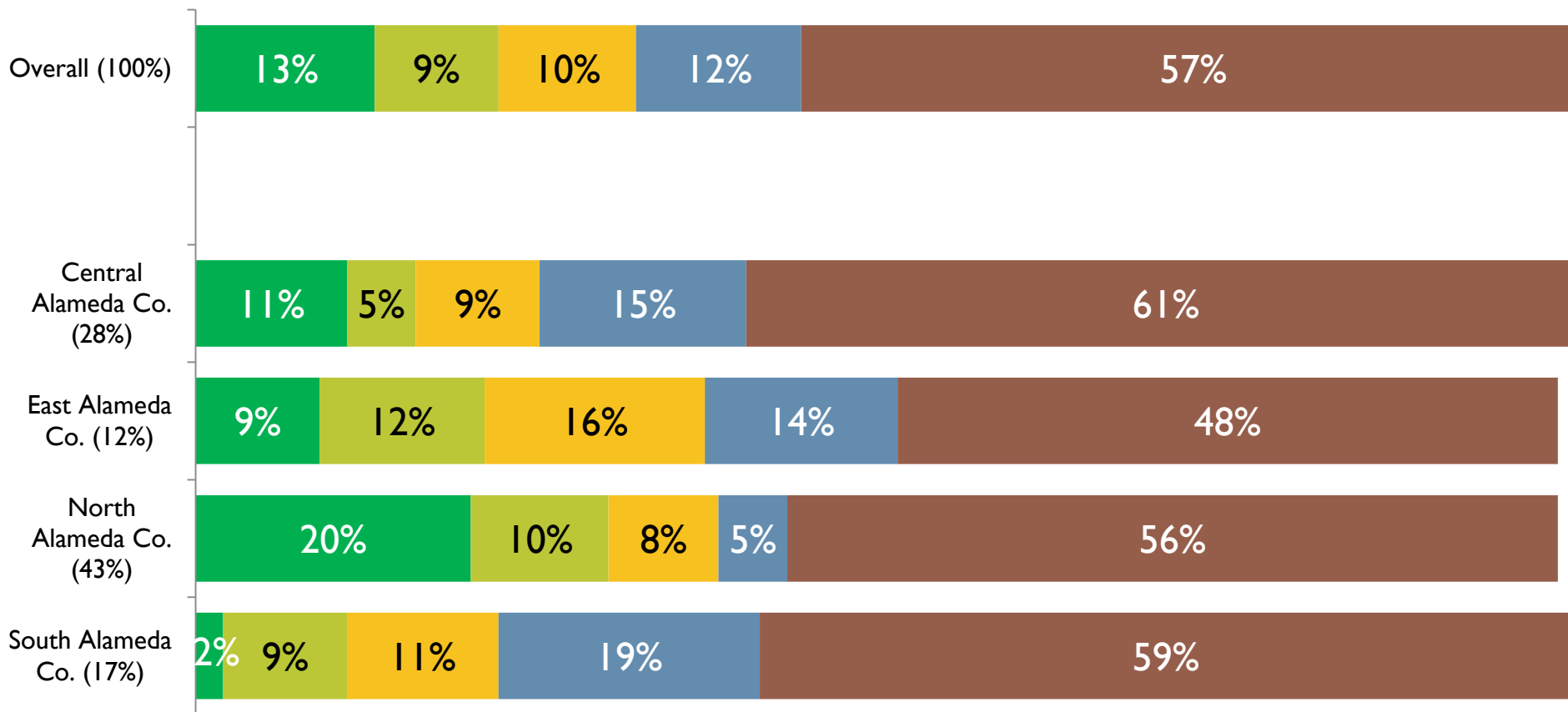
*Colored cells indicate an increase that is more than 5 points (Margin of Error) in the Regional Group(s) compared to the Overall Population*





# Bicyclist Segmentation by Region

■ Committed Bicyclists 
 ■ Primary Target 
 ■ Secondary Target 
 ■ Less Likely Bicyclists 
 ■ Non-Bicyclists





# Regional Findings

# Regional Findings Summary

## Central Alameda County

- Most ethnically diverse
- Take kids to school more often than other regions
- Tied with North County for highest penetration of “Get Rolling” campaign
- High level of concern on many barriers to bicycling
- Most attracted to safety improvements like bike paths and lanes, as well as secure bike parking
- Smallest representation in the target groups

## East Alameda County

- Predominantly 40-64 and white
- Likely to have a car & drive the most frequently
- “Get Rolling” advertising penetration negligible
- Convenience is a critical concern about bicycling
- Most attracted to safety improvements like bike paths and lanes, as well as secure bike parking
- Less likely to be committed bicyclists than the overall, but largest representation in the target groups

## North Alameda County

- Least likely to own or use a car frequently
- Goes to work more frequently than other groups
- Rides a bicycle & takes transit more frequently than other groups
- Tied with Central County for highest penetration of “Get Rolling” campaign
- Safety is the biggest concern about bicycling in this area
- Most attracted to safety improvements like bike paths and lanes, as well as secure bike parking
- Highest penetration of committed cyclists, but targets are not underrepresented

## South Alameda County

- Highest Asian population area
- Highest car ownership and frequent usage, particularly in a carpool
- Limited penetration of “Get Rolling” campaign
- Distance and time are major barriers to bicycle usage
- Most attracted to safety improvements like bike paths and lanes, as well as secure bike parking
- Smallest committed bicyclist population in this region



Next Steps