

Bike to Work Day & *Get Rolling* Campaign  
Assessment Report

*Summary of Findings and Recommendations*

Prepared for  
Alameda County Transportation Commission  
(Alameda CTC)



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**DRAFT 12/13/11**

# Methodologies

## Residents surveys:

- ▶ Representative telephone surveys of adult residents of Alameda County
- ▶ Random-digit-dial methodology; both landline & cellular phones
- ▶ 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
- ▶ 2011 survey conducted June 20-26, 2011
  - ▶ 402 completed interviews, margin of error  $\pm$  4.9 points
- ▶ 2010 survey conducted Nov. 30 – Dec. 5, 2010
  - ▶ 400 completed interviews, margin of error  $\pm$  4.9 points

## Bicyclists surveys:

- ▶ Web survey of bicyclists in Alameda County
- ▶ Survey link was broadcasted to a variety of on-line lists and forums, including the EBBC listserv, Team Bike Challenge & Bike to Work Day 2011 participant lists, and local bicycling shop and group lists.
- ▶ Respondents self-selected
- ▶ 2011 survey open July 26 – Aug. 25, 2011
  - ▶ 679 completed interviews
- ▶ 2010 survey open Dec. 7, 2010 – Jan. 17, 2011
  - ▶ 656 completed interviews

*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%*

# Alameda County Map and Planning Areas





# Key Findings: Summary

# Key Findings: Bicycling in Alameda County

- ▶ About half of Alameda County residents (48%) have access to a working bicycle, while 83% have access to a car.
- ▶ One in five Alameda County residents (20%) report riding a bicycle at least once a week for any purpose, while another 15% say they ride less frequently (but more than never).
  - ▶ North County has the highest concentration of cyclists using their bicycles for transportation, while East county residents are most likely to ride for health and recreation.
- ▶ More people ride bicycles for health and recreation than for any other purpose, and the health benefits are the most compelling reason to ride for both overall residents and cyclists.
  - ▶ Environmental benefits, reduced energy usage, air quality improvements, and reduced greenhouse gas emissions are also strong motivators for bicycle riding.
  - ▶ Reduction in traffic congestion and avoidance of traffic do not rank as highly as motivators for bicycle riding.
- ▶ One in ten (11%) working residents in the county say they ride their bicycle for at least part of their trip to work at least once a week.

# Key Findings: Bicycling in Alameda County

*(continued)*

- ▶ One out of four Alameda County residents who drive (or 21% of the county adult population) say it would not be difficult to replace at least one car trip per week with bicycling.
- ▶ The safety of riding a bicycle is a top concern for many current and would-be bicyclists, particularly with cars on roadways – 66% are worried about riding with cars on the road, 65% believe there aren't enough bike lanes on their route, 64% are worried about personal safety, and 63% are worried about getting home in an emergency. Trip distance is also a significant barrier for many residents, with 65% saying they go places that are too far away to ride.
  - ▶ The top concerns remained consistent over the two-year study period.
- ▶ Residents are most likely to ride more often if they have more places where bikes can ride away from cars, like bike paths (56% much more likely to ride), followed by safety improvements at major intersections (54% much more likely to ride), more secure bike parking (51%), more dedicated bike lanes (49%), and more secure parking at transit stations (47%).

# Key Findings: Bike to Work Day

- ▶ Nearly two-thirds (72%) of adult residents of Alameda County, and 89% of those from the bicyclists' web survey, have heard of Bike to Work Day (BTWD).
- ▶ In the 2011 telephone survey, 9% of adult residents said they have participated in Bike to Work Day at some point, with 2% participating in 2011.
  - ▶ In 2010, 5% of residents reported participating in BTWD, which is within the 5 point margin of error for the surveys.
  - ▶ Three quarters of those who took the bicyclists' survey participated in BTWD 2011, up from 62% in 2010.
- ▶ Three quarters (74%) of 2011 BTWD participants from the bicyclists' web survey rode their bikes the entire distance to work on Bike to Work Day; 20% combined biking and public transit; 2% combined biking and driving a car.
  - ▶ Two out of three bicyclists who participated in Bike to Work Day were likely to have ridden their bicycles anyway, but 30% would have driven in a car alone.
- ▶ In the two years studied, according to self-reported participation and mileage figures, and understanding that survey data is subject to known and unknown sources of sampling and other margins of error, Alameda County residents drove about one hundred thousand to one hundred fifty thousand miles less on Bike to Work Day.
  - ▶ **2010:** 15,210 solo trips replaced x 10.25 average miles traveled by bicycle = 156,358.8 reduced VMT.
  - ▶ **2011:** 7,005 solo trips replaced x 13.17 average miles traveled by bicycle = 92,250 reduced VMT.

# Key Findings: Bike to Work Day

*(continued)*

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- ▶ Participants in the 2011 bicyclists' survey heard about Bike to Work day from a variety of sources, including the EBBC website (33%), their employer (32%), a coworker (32%), a poster or billboard (18%), 511.org (16%), a local bicycle organization newsletter (16%), or [www.youcanbikethere.com](http://www.youcanbikethere.com) (the Bay Area BTWD website) (15%).
- ▶ Almost all Bike to Work Day participants are likely to participate again. In 2011, 67% of adult residents and 94% of bicyclists who participated in Bike to Work Day say they are very likely to participate in 2012, with most of the remainder saying they are somewhat likely to participate in 2012.
- ▶ Twenty-seven percent (27%) of participants from the bicyclists' web survey who participated in BTWD 2011 say they ride their bicycles more often since participating, with 11% of this group saying they ride a lot more often.
- ▶ Those residents whose employers generally support bicycling to work report a higher level of participation in BTWD than those who have less supportive employers.

# Key Findings: Team Bike Challenge

- ▶ One in ten adult residents of Alameda County (9%) have heard of the Team Bike Challenge, while three-quarters (73%) of those from the bicyclists' web survey have heard of it.
  - ▶ Amongst bicyclists from the web survey, awareness of and participation in the Team Bike Challenge (TBC) is highest in Central County: 80% are aware of TBC, and 45% participated.
- ▶ Nearly half of bicyclists who participated in the Team Bike Challenge did so due to workplace support or peer relationships.
  - ▶ Fifteen percent (15%) of past participants who did not participate in TBC in 2011 couldn't find a team/teammates.
- ▶ Thirty-five percent (35%) of 2011 Team Bike Challenge participants from the web survey of bicyclists say they ride more after participating in the TBC (with 9% saying a lot more).
- ▶ Compare this with BTWD participants, 27% of whom say they bicycle more after participating in BTWD (11% a lot more).

# Key Findings: Walk & Roll to School Day

- ▶ One in five adult Alameda County residents (21%) have heard of Walk & Roll to School Day, with awareness slightly higher amongst those who took the bicyclist survey (30%).
  - ▶ Participation in Walk & Roll to School Day is consistent across surveys as well, as well, with 9% of adult residents in the 2011 telephone survey and 10% of bicyclists in the web survey reporting participation.
  - ▶ Participation in Walk and Roll to School Day 2011 by adult residents was highest in East County (17%), followed by South (12%) and North (11%). Just 2% of Central County adult residents participated in Walk & Roll to School Day.

# Key Findings: Advertising

- ▶ While advertising penetration is low in Alameda County, people that have seen the advertisements find them effective, and the campaign gets the message of riding a bicycle as a regular form of transportation across to those who have seen it.
  - ▶ Bicyclists are more likely than the overall population to recall the ads: 4% of adult residents recall the ads in 2011, while 13% of bicyclists recall them.
  - ▶ Buses and bus shelters were the most visible placements for ads in 2010, while flyers and handouts were more visible in 2011.
- ▶ Four out of five (81%) of those from the 2011 bicyclists survey who said they had seen *Get Rolling/Ride Into Life* ads thought they had something to do with bicycling.

# Key Findings: Advertising

*(continued)*

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- ▶ Upon viewing a sample of the ads in the 2011 web survey, 60% of bicyclist respondents thought the ads were either very or somewhat effective, while 34% thought they were not very effective, and 5% thought they were not at all effective.
- ▶ The image that recalls gas prices and suggests that money could be saved by cycling was cited most often as the most effective component, with 37% finding that imagery effective in 2011, as compared to 22% in 2010. (The 2011 survey was taken more shortly after Bike to Work Day than the 2010 survey.)

# Key Findings: Segmentation of Bicyclists and Potential Targets

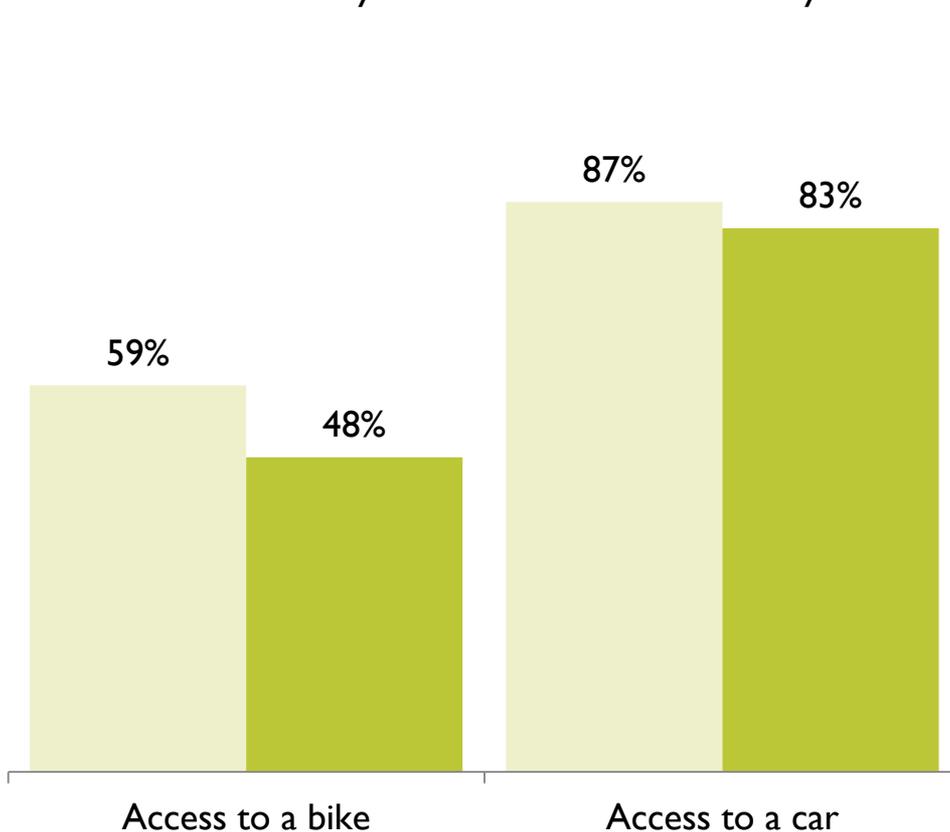
- ▶ Committed bicyclists who already use a bicycle as transportation with frequency are largely men in North County. Whites (36%) and Hispanics (28%) make up a majority of this group.
- ▶ While encouraging bicycling as a means of transportation for all residents and workers in Alameda County is a goal, several potential bicycling groups were identified for future targeting as having the highest potential for increasing bicycle ridership:
  - ▶ One of the groups with the highest potential to increase bike ridership is white men in North County who ride bicycles as transportation occasionally, but could be encouraged to ride more. They tend to be solo drivers who are concerned about safety issues and ride logistics (like weather, secure bicycle parking, and showers).
  - ▶ Another potential target group to increase bike ridership is those who frequently ride recreationally, but do not use their bicycles as a mode of transportation. Two-thirds of this group are men, with East County residents having the largest share (as compared with the overall population). This group also tends to drive alone most often, with safety and distance to travel ranking high on their list of concerns.
  - ▶ A third target group was created from those who drive regularly but say they can replace a car trip with a bike trip with relative ease. Half of this group are women, and they tend to be from North or Central County. This group equally cites safety concerns and difficulty as reasons they don't ride more often as transportation.



# Key Findings: Bicycling in Alameda County

# Half of county residents have access to a bicycle; most have access to a car

■ Residents Survey 2010    ■ Residents Survey 2011



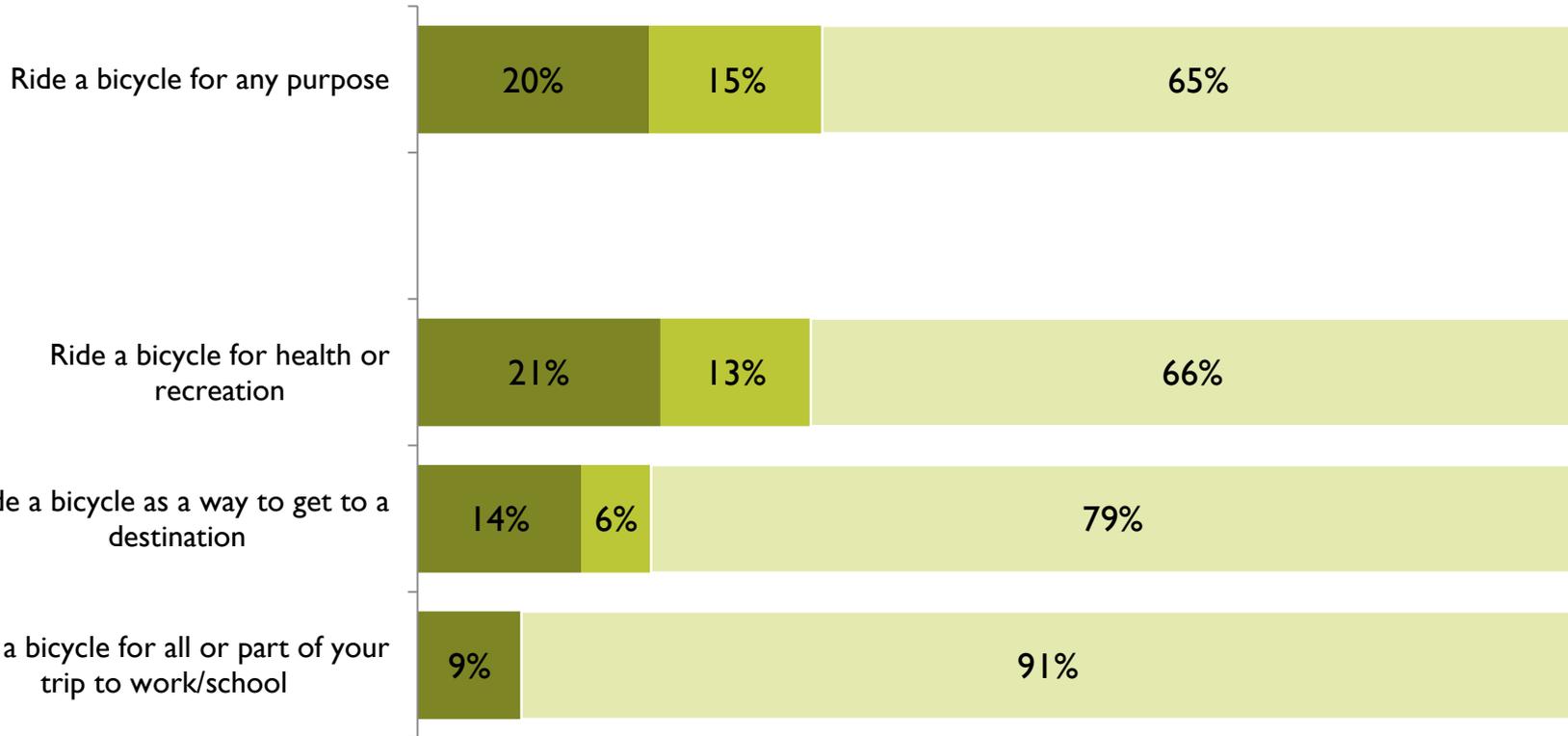
| Access to...          | Residents Survey 2010 | Residents Survey 2011 |
|-----------------------|-----------------------|-----------------------|
| Both a bike and a car | 53%                   | 44%                   |
| Only a bike           | 7%                    | 4%                    |
| Only a car            | 34%                   | 39%                   |
| Neither               | 7%                    | 13%                   |

# One in five ride a bicycle at least once a week, with more riding for health or recreation than for other purposes

**(Residents) In general, how many days per week would you say you...**

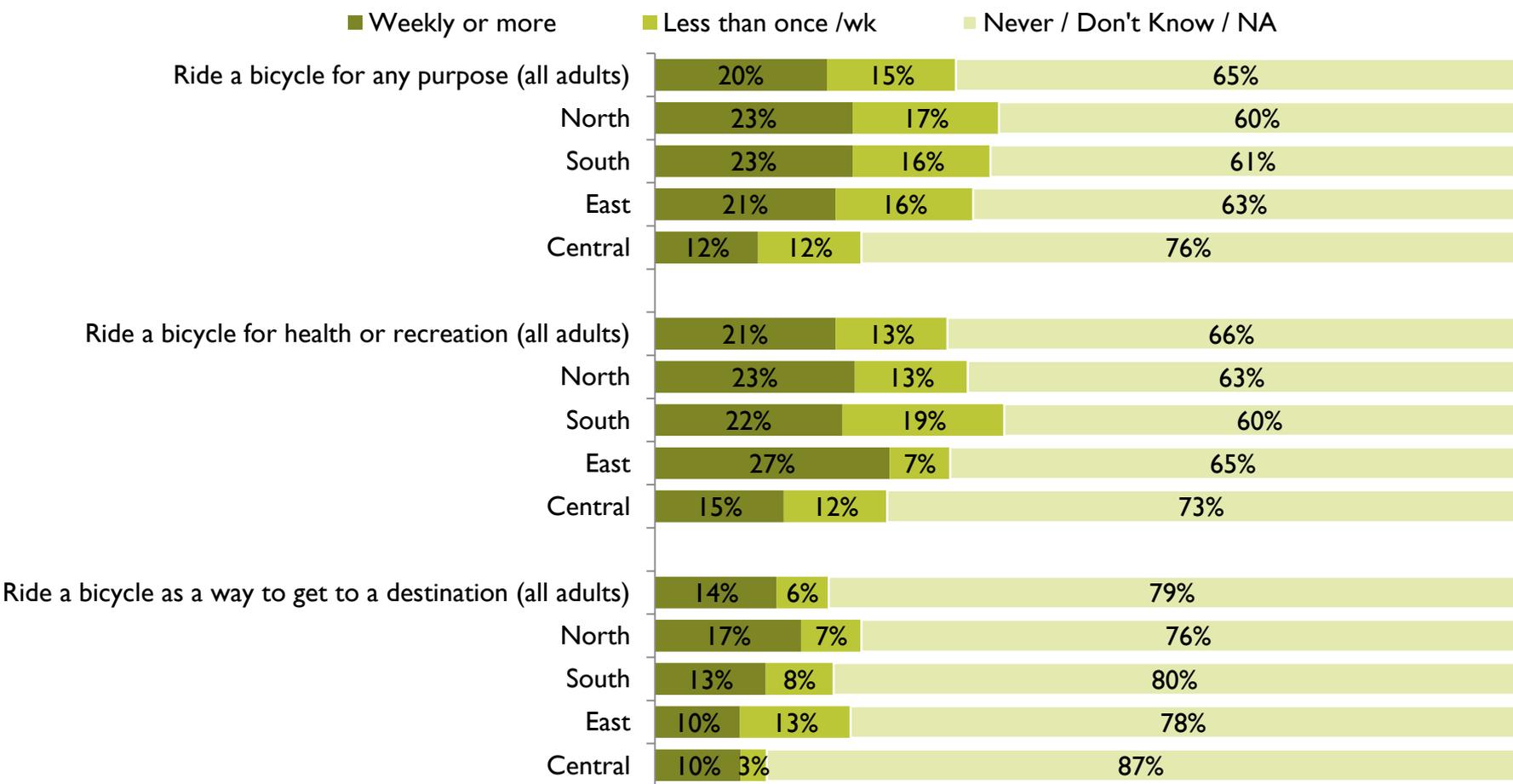
*(IF THEY SAY LESS THAN ONCE A WEEK: "Would you say you do that one to four days a month, one to eleven days a year, or just about never?")*

■ Weekly or more   ■ Less than once /wk   ■ Never / Don't Know / NA



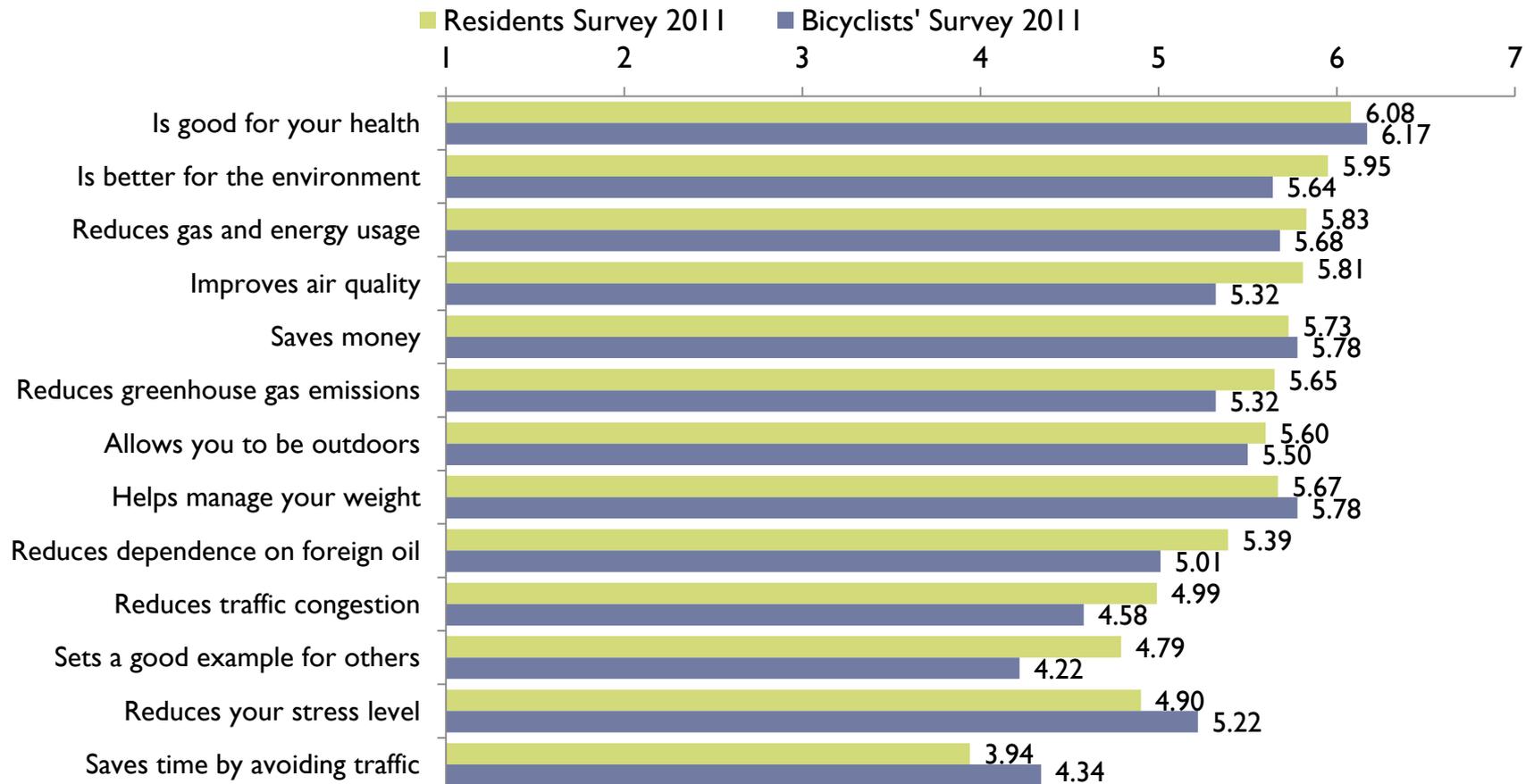
# East County residents are most likely to ride at least once a week for health and recreation; North County residents are the most frequent users of bicycles as transportation

**(Residents) In general, how many days per week would you say you...**



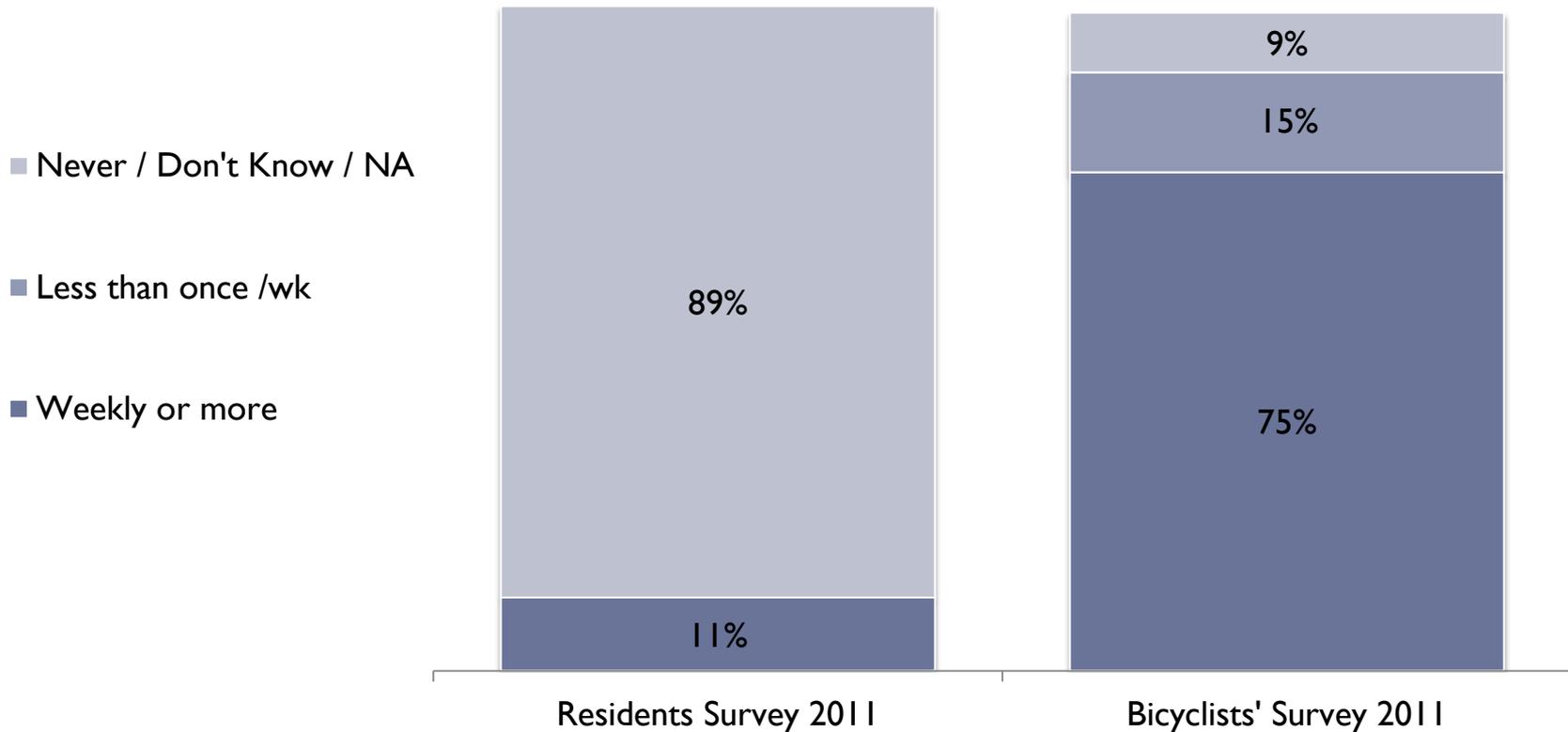
# Health benefits are the most compelling reasons to ride for both residents and bicyclists

I'm going to read you a list of reasons some people ride their bicycles as a form of transportation. After each one, on a scale of 1 to 7 please rate how convincing that reason is to ride a bicycle as a form of transportation, where **1 means not at all convincing, and 7 means very convincing.**



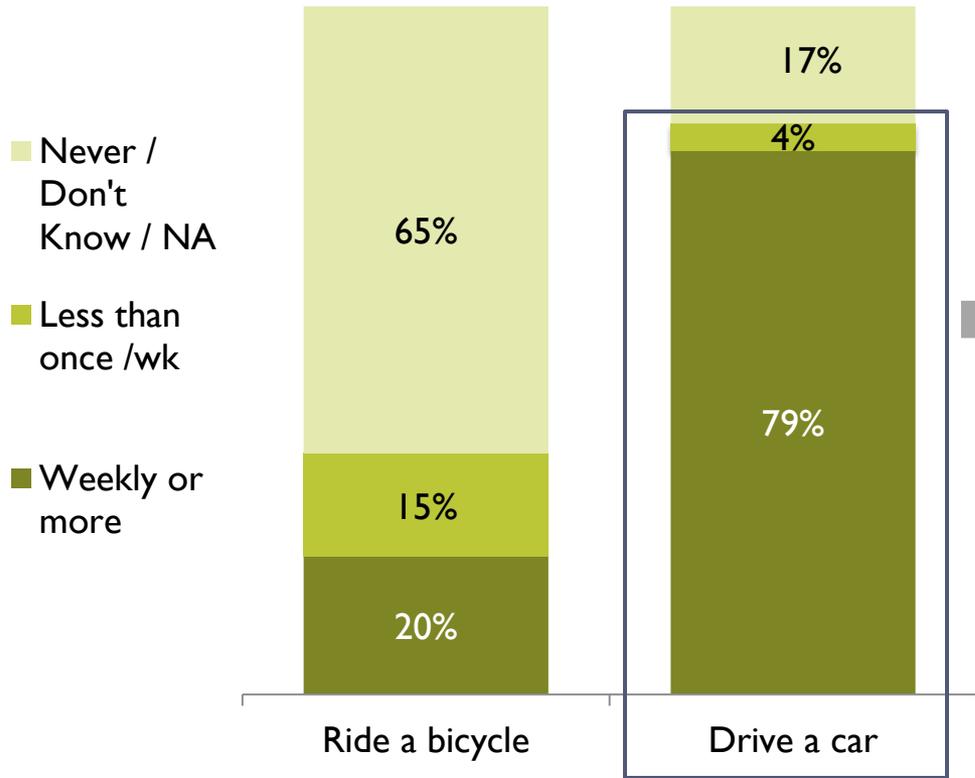
# One in ten Alameda County residents report that they ride their bicycle for at least part of their trip to work once a week or more

*In a typical week, how many days would you say you ride your bicycle for all or part of your trip to work, if at all?*



A quarter of those who drive (21% of entire adult population) say it would NOT be difficult to switch to biking as part of a trip

**(Residents)** In general, how many days per week would you say you...



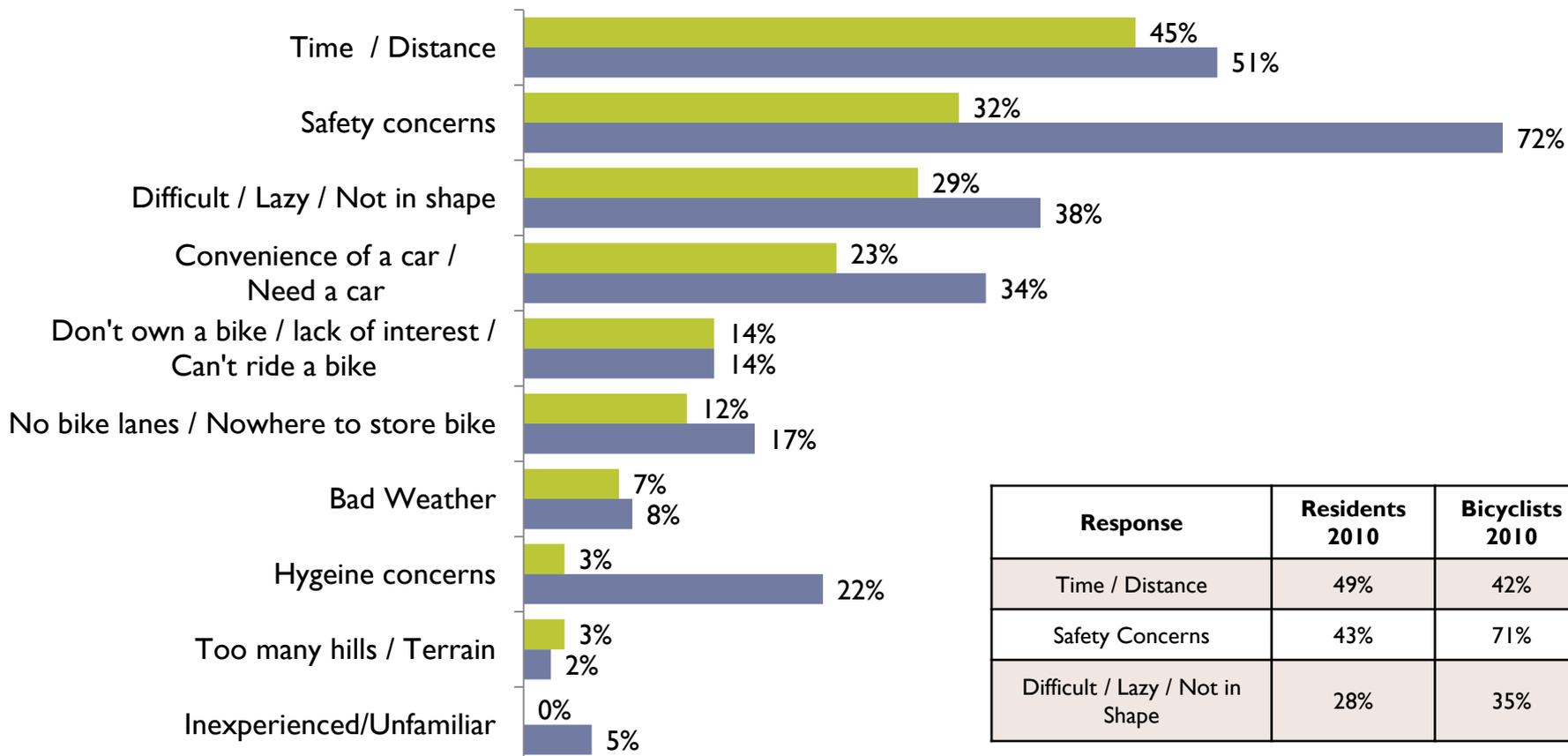
**(Residents)** Thinking about all of the trips you take in a car each week, how difficult would it be to instead ride a bicycle for at least one of those trips? Would it be...

| Difficulty Level     | Percentage | n=334 |
|----------------------|------------|-------|
| Very Difficult       | 55%        |       |
| Somewhat Difficult   | 19%        |       |
| Not Very Difficult   | 11%        |       |
| Not At All Difficult | 14%        |       |
| Don't Know / NA      | 1%         |       |

# In an open-ended question, the safety of riding a bicycle is a top concern for many current and potential bicyclists; amongst adult residents, time and distance eclipse safety concerns

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 – Accept up to 3 responses**)

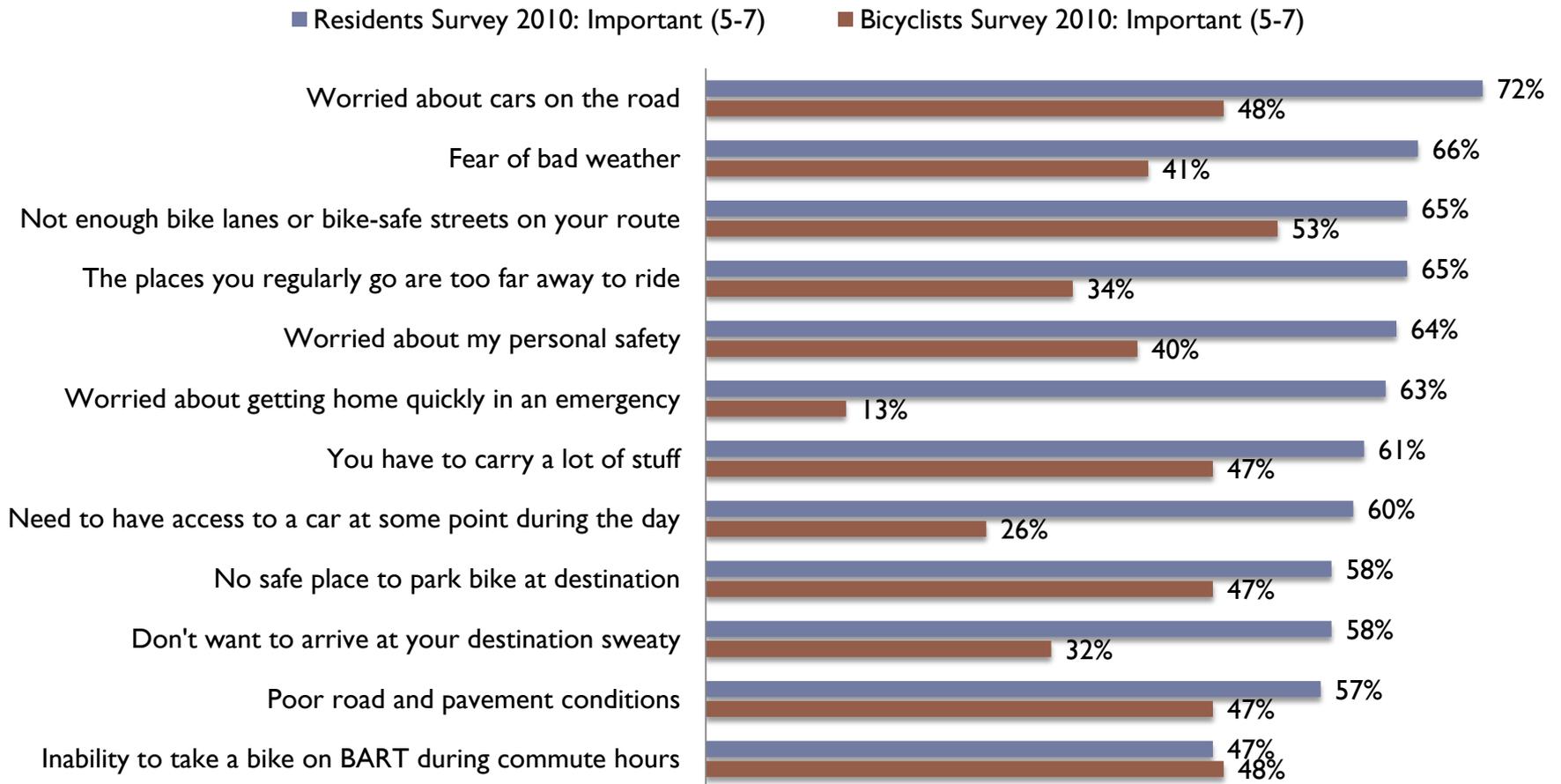
■ Residents Survey 2011   ■ Bicyclists Survey 2011



| Response                        | Residents 2010 | Bicyclists 2010 |
|---------------------------------|----------------|-----------------|
| Time / Distance                 | 49%            | 42%             |
| Safety Concerns                 | 43%            | 71%             |
| Difficult / Lazy / Not in Shape | 28%            | 35%             |

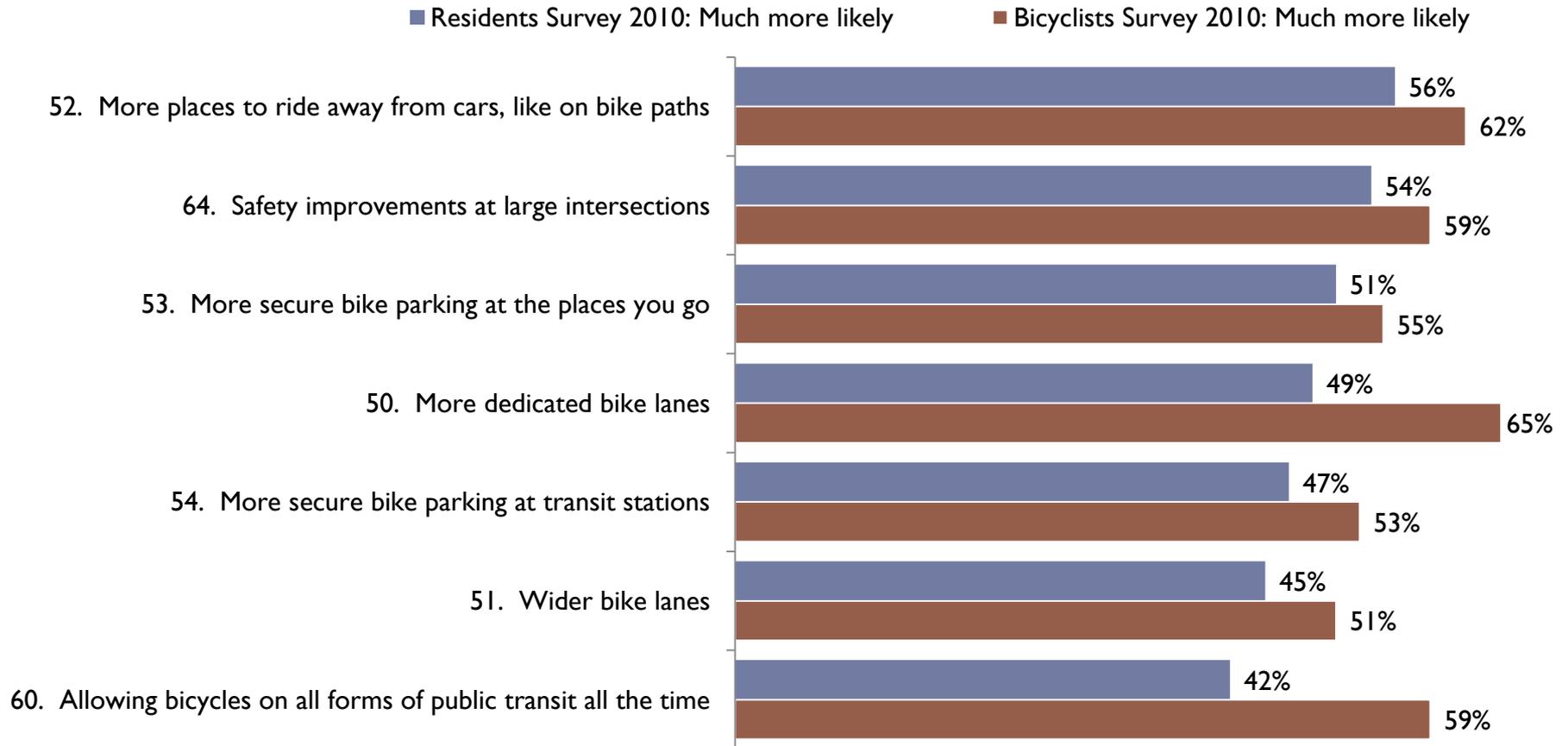
# Concern about riding with cars on the road ranked at or near the top for residents and bicyclists in 2010

Whether or not you regularly ride your bicycle to get where you are going, please indicate how important of a factor each of the following 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.  
**(Top responses)**



# Riding safety and parking improvements are the most appealing improvements to encourage riding

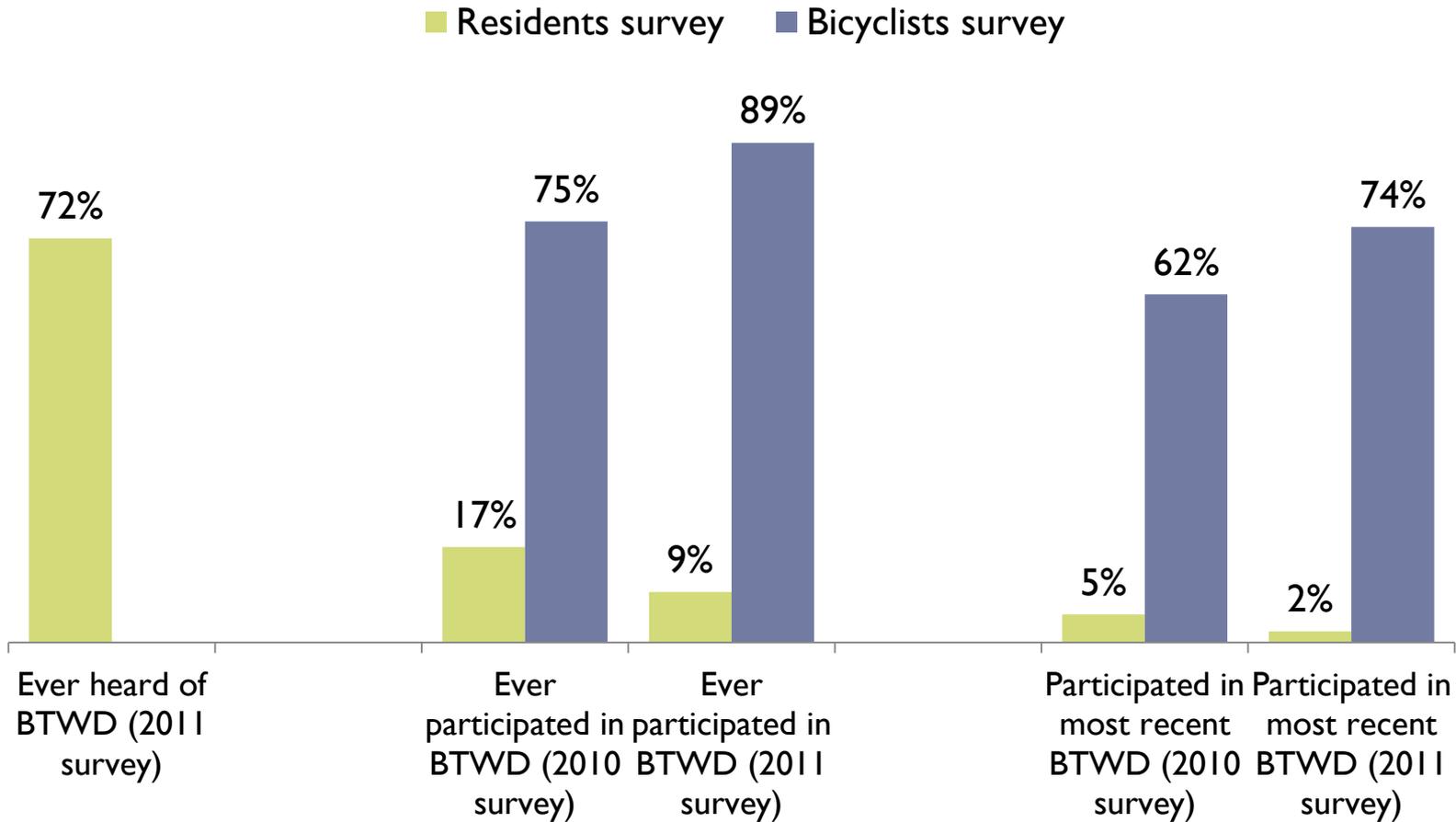
Following is a list of things that might make it easier for people to ride their bicycles as transportation. For each, please indicate if it would make you more likely to ride your bicycle more often for transportation. **(Top responses)**





# Key Findings: Bike to Work Day

# Nearly two-thirds of adult residents of Alameda County have heard of Bike to Work Day, but just two percent participated in 2011; Participation rates amongst bicyclists are high



*Note that the web link for the bicyclists' survey was distributed largely through Bike to Work Day participant lists, which may lead to some overrepresentation of BTWD participants in bicyclists' web survey results.*

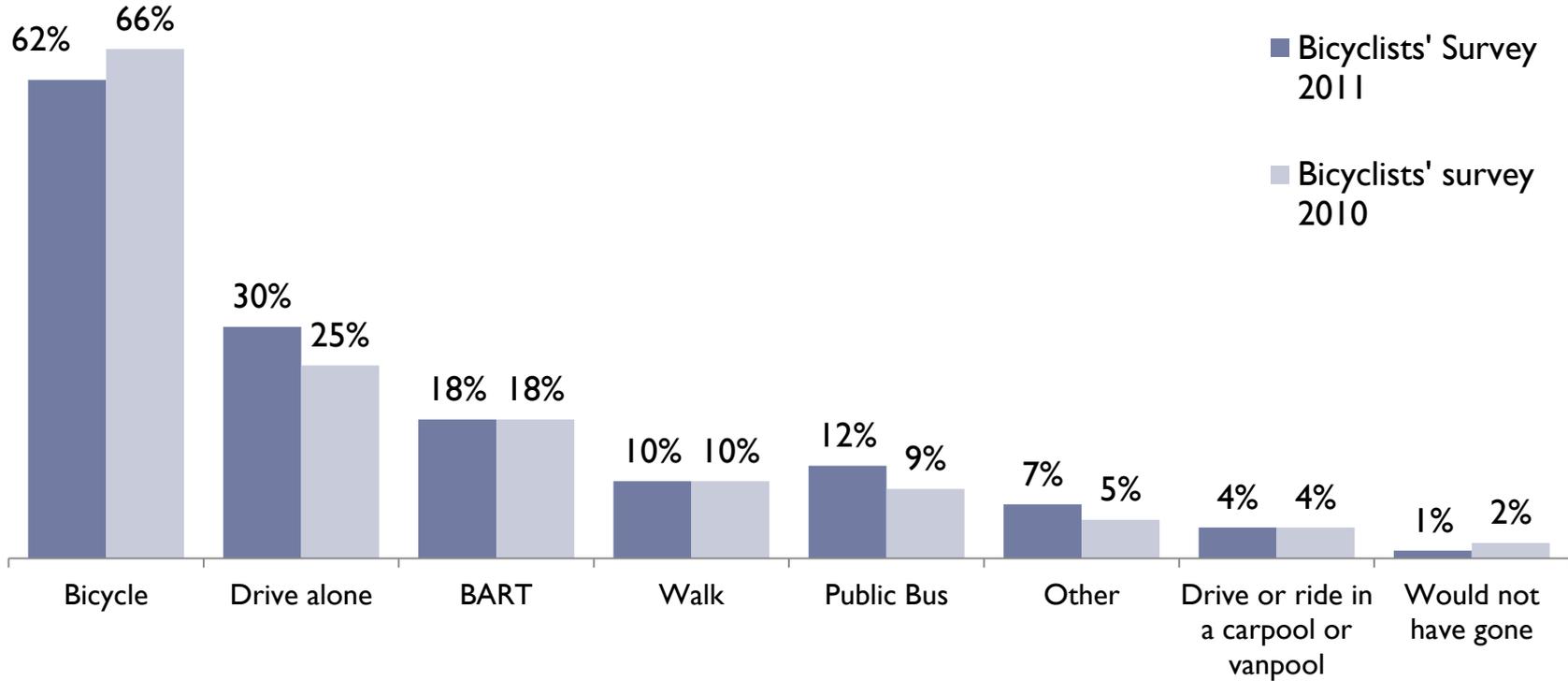
Three-quarters (74%) of BTWD participants from the bicyclists' web survey rode their bike the entire way; one in five combined biking and public transit; 2% combined biking with driving

**(Bicyclists) On Bike to Work Day, did you... (select one)**

| Bicyclists Survey 2011 (n=606)  | %   |
|---|-----|
| Ride your bike all the way from home to your destination                                      | 74% |
| Ride your bike some of the way and take transit some of the way from home to your destination | 20% |
| Ride your bike some of the way and drive some of the way from home to your destination        | 2%  |
| Something else/ Don't Remember  | 4%  |

# Two out of three BTWD participants from the bicyclists' survey would have biked to work that day anyway; 30% would have driven alone

**(Bicyclists)** *If it had not been Bike to Work Day, what mode or modes of transportation would you likely have taken to get where you were going that day? Please select all of the modes you would have used.*



# The two BTWDs under study reduced solo vehicle miles by anywhere from 92,000 to 150,000

## *(Bicyclists) Estimate of reduction in Vehicle Miles Traveled*

|      | Self-reported BTWD participation rate | Estimated number of BTWD participants | Percent who would have traveled alone in a car | Average miles traveled by bike | Estimate of solo vehicle miles reduced on BTWD |
|------|---------------------------------------|---------------------------------------|--|--------------------------------|--|
| 2010 | 5%                                    | 58,500                                | 25%  | 10.28 miles                    | 150,345 miles                                  |
| 2011 | 2%                                    | 23,350                                | 30%  | 13.17 miles                    | 92,256 miles                                   |

*Please note that each survey has a total sample size of about 400 interviews and a margin of error of about plus or minus 4.9 percentage points.*

# The EBBC and the workplace or colleagues are the most frequent sources of information for Bike to Work Day

## **(Bicyclists)** How did you learn about Bike to Work Day? (Open-ended)

| Bicyclists Survey 2011                                      | %   |
|---|-----|
| East Bay Bicycle Coalition website                          | 33% |
| Employer  | 32% |
| Coworker (other than on Facebook or Twitter)                | 32% |
| Poster or billboard   | 18% |
| 511.org   | 16% |
| www.youcanbikethere.com                                     | 15% |
| Local bicycle organization email newsletter                 | 16% |
| Friend or family member (other than on Facebook or Twitter) | 15% |
| Other bicycle organization website                          | 12% |
| Facebook/Twitter  | 9%  |
| Radio advertisement or announcement                         | 7%  |
| Local bicycle organization paper newsletter                 | 5%  |
| Other   | 13% |
| Don't remember  | 6%  |

*Note that the web link for the cyclists survey was distributed largely through Bike to Work Day participant lists by the East Bay Bicycle Coalition.*

# Nearly all BTWD participants from the residents' and bicyclists' survey plan to repeat

How likely are you to participate in Bike to Work Day in May 2012? (BTWD participants only)

■ Very likely   
 ■ Somewhat likely   
 ■ Don't Know   
 ■ Somewhat unlikely   
 ■ Very unlikely



2010 Residents' Survey: Participant likelihood to participate in BTWD 2011

2011 Residents' Survey: Participant likelihood to participate in BTWD 2012

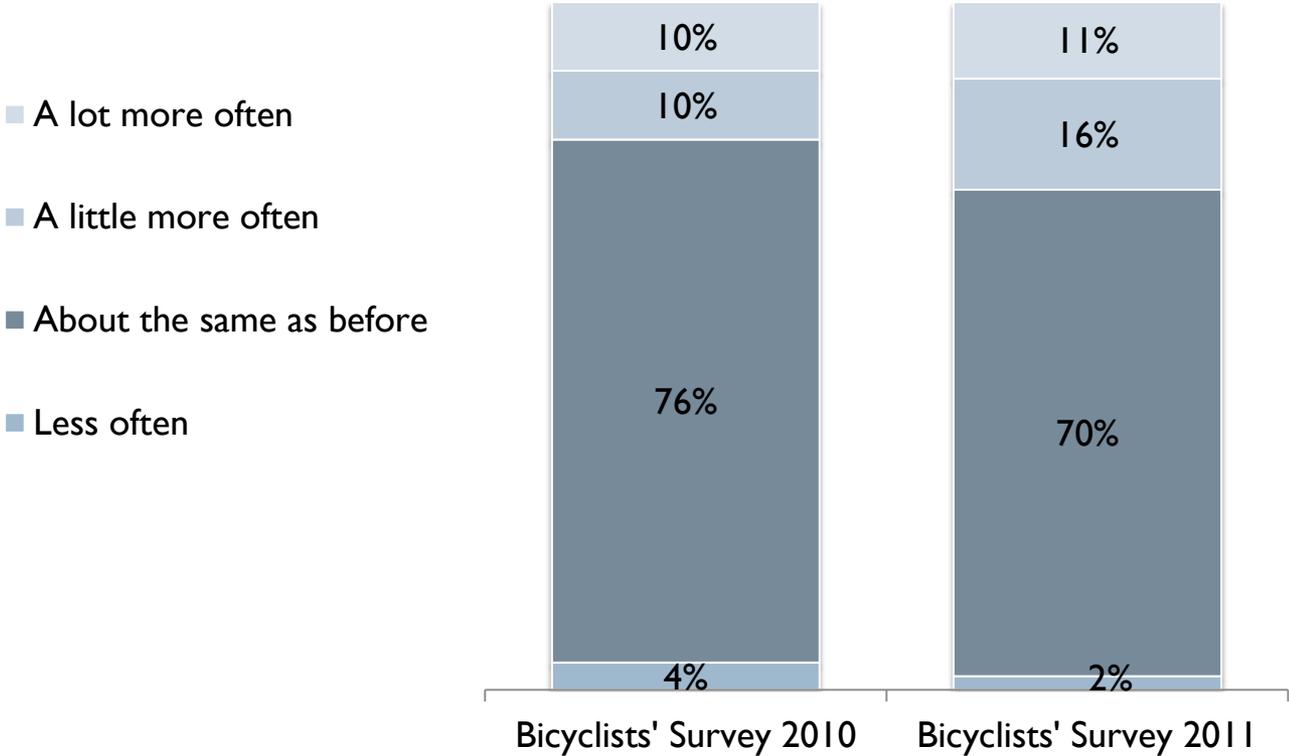
2010 Bicyclists: Likely BTWD 2011 Participation

2011 Bicyclists' Survey: Participant likelihood to participate in BTWD 2012



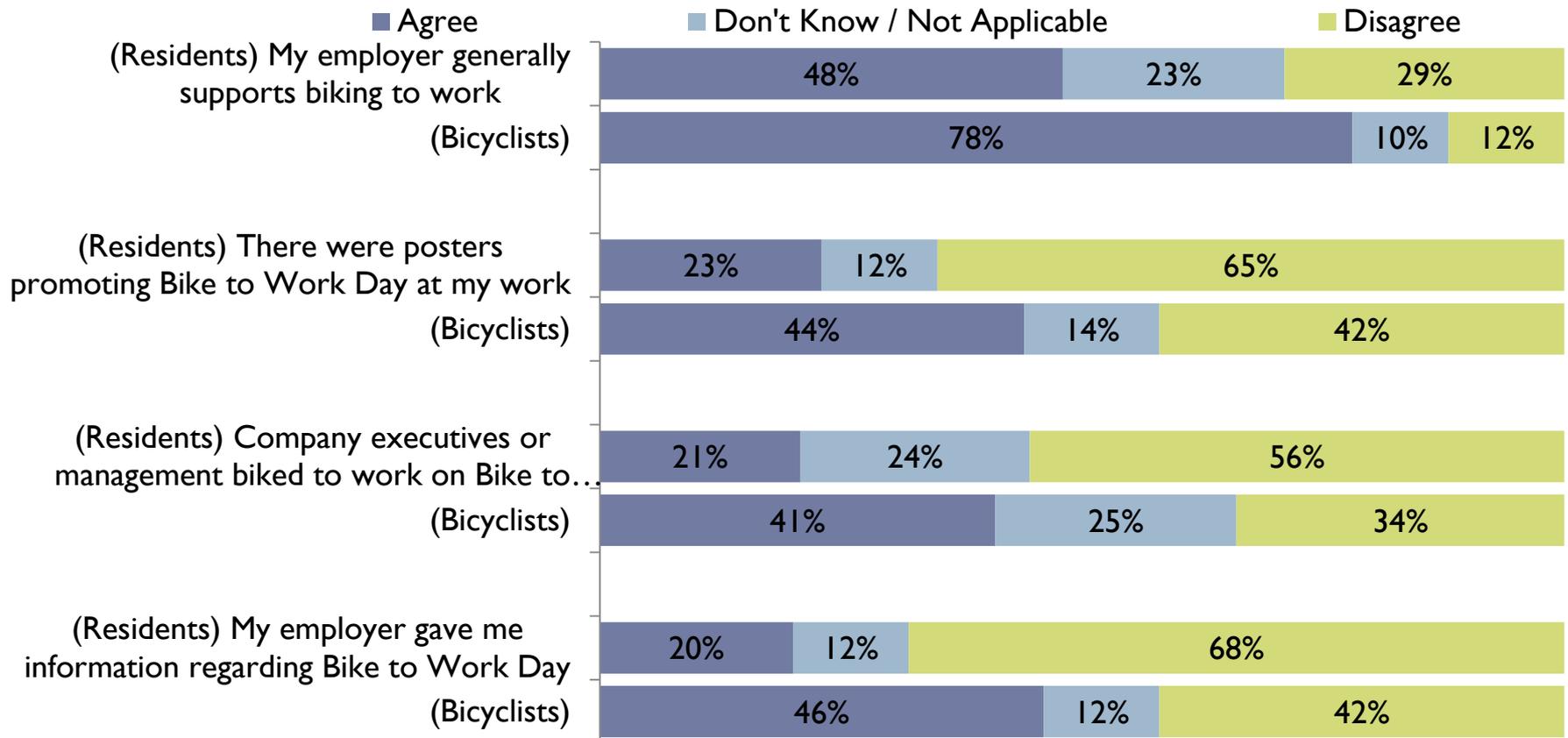
# One quarter of BTWD 2011 participants say they ride their bicycle a little or a lot more often than before they participated

## Since participating in Bike to Work Day, would you say you ride your bicycle...

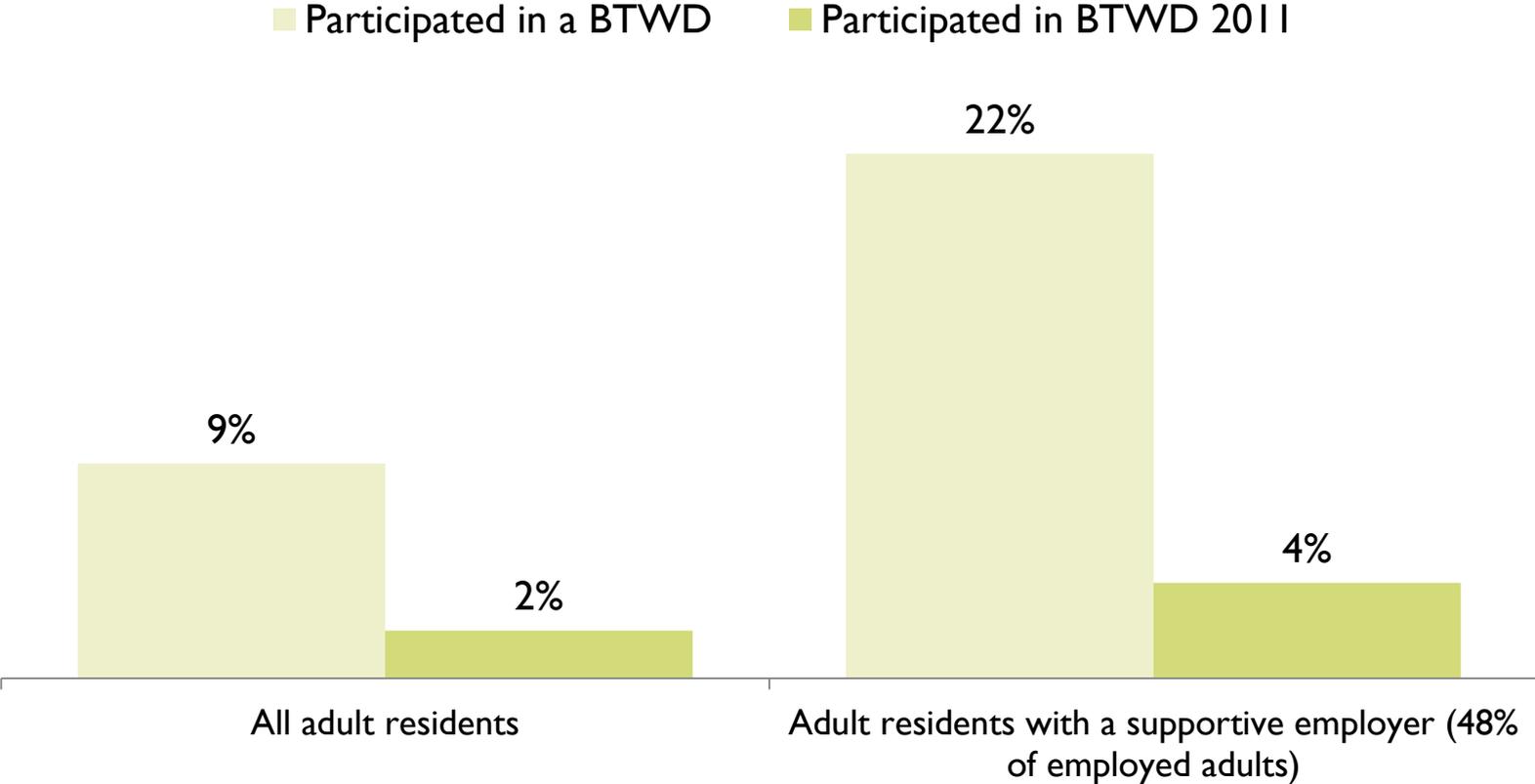


# Employer support for biking as a commute mode, and for BTWD in particular, is higher for bicyclists than residents in general

*I'm going to read you some statement regarding your employer's involvement in Bike to Work Day. For each one, please say if you agree or disagree with that statement. If the statement does not apply to you, please say so and we will move on*



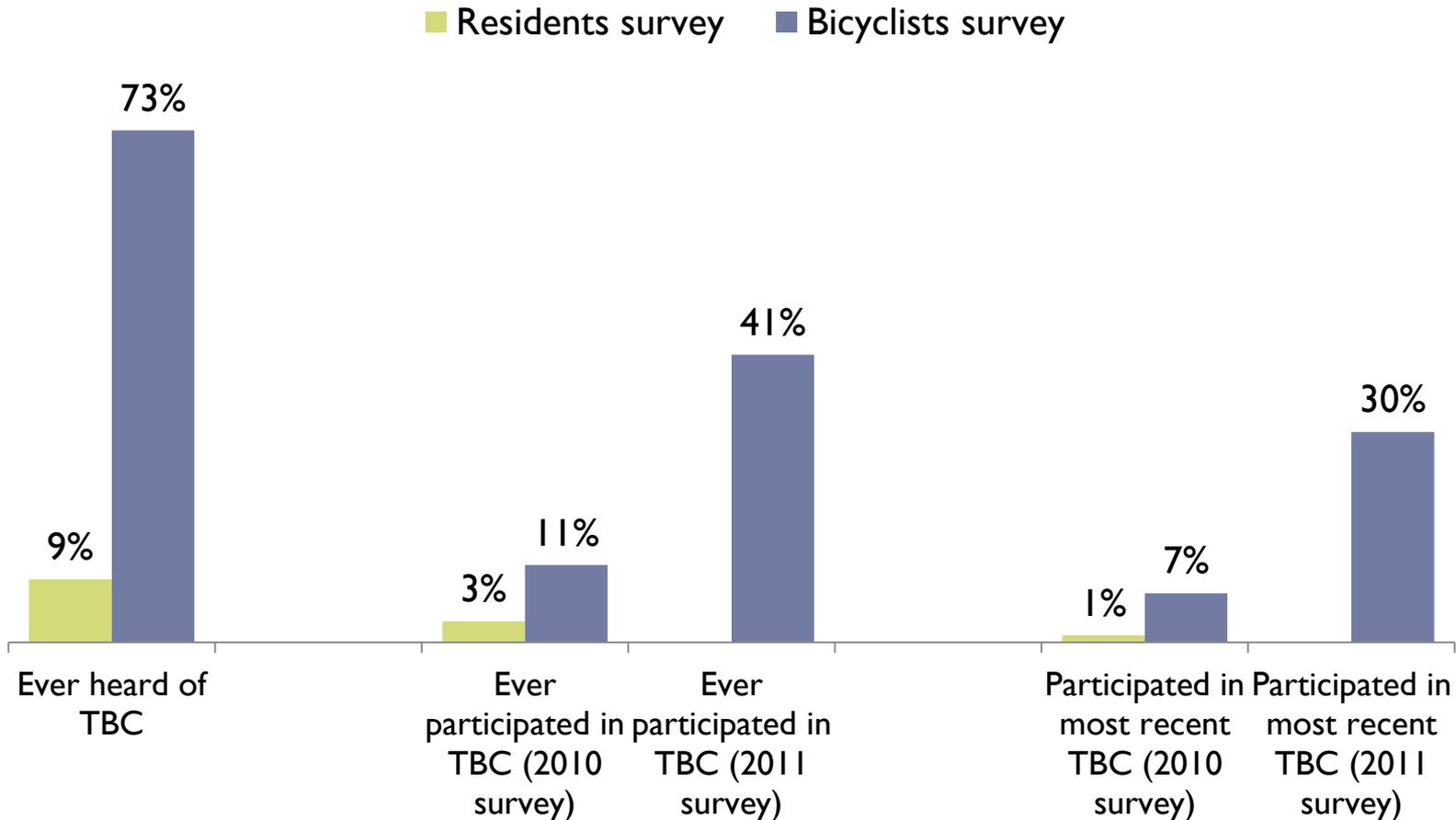
# Those residents whose employers generally support bicycling to work report higher BTWD participation





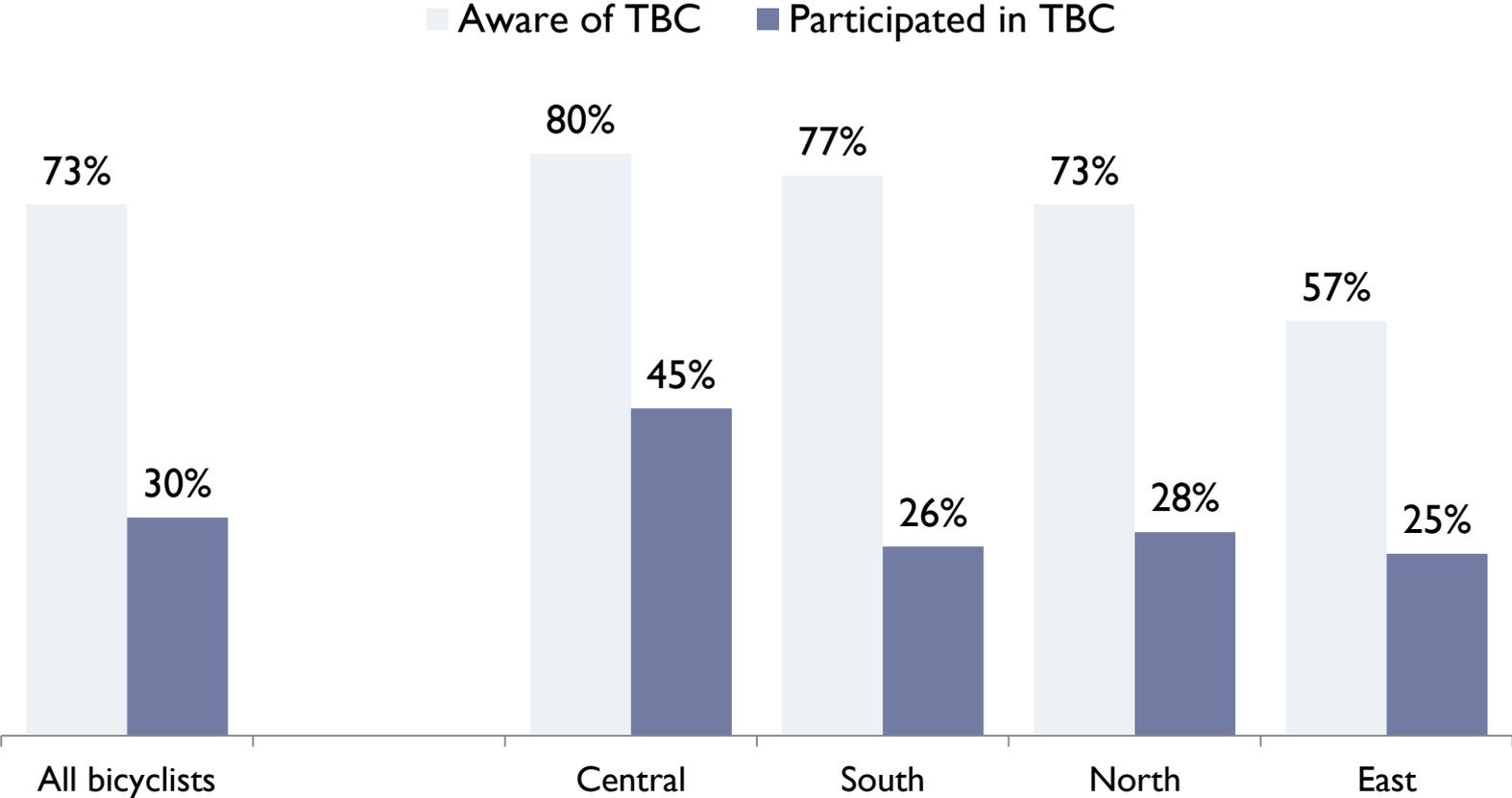
# Key Findings: Team Bike Challenge

# One in ten adult residents and three-quarters of bicyclists have heard of the Team Bike Challenge; Participation amongst bicyclists grew in 2011



*Note that the web link for the 2011 cyclists survey was distributed partly through Team Bike Challenge participant lists, which may lead to some overrepresentation of TBC participants in survey results.*

# Central County bicyclists are most likely to be aware of and participate in the TBC; Awareness is lowest in East County



*Note that the web link for the 2011 cyclists survey was distributed partly through Team Bike Challenge participant lists, which may lead to some overrepresentation of TBC participants in survey results.*

# Nearly half of TBC participants were motivated by their workplace or work peers; Finding a team can be challenging

**(Bicyclists)** What would you say is the main reason you decided to participate in the 2011 Team Bike Challenge?  
**(Open-ended)**

**(Bicyclists)** Why did you choose not to participate in the 2011 Team Bike Challenge? (Open-ended)\*\*\*For those who have heard of TBC but did not participate in 2011

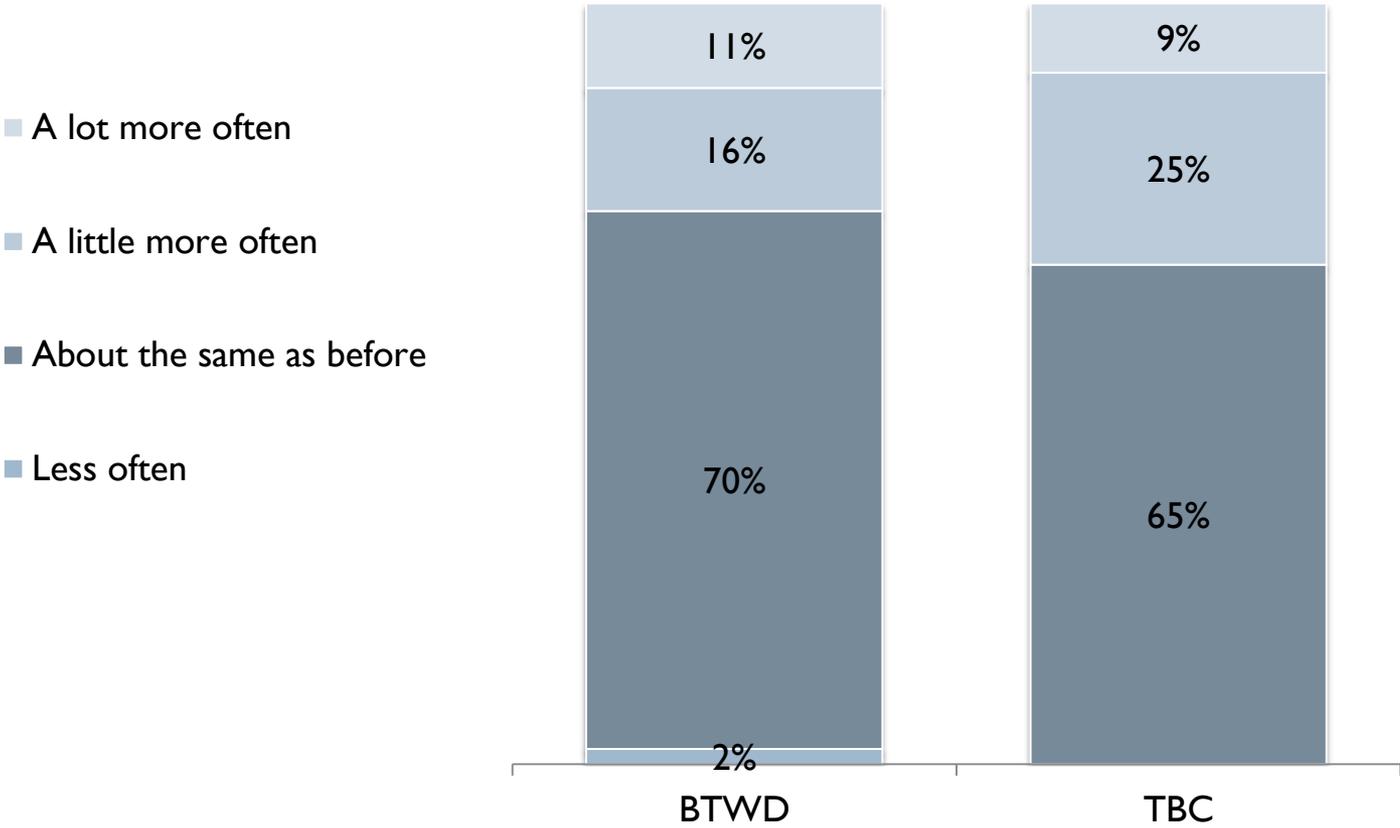
| Bicyclists (n=192)  | %   |
|---|-----|
| Work-sponsored/ Build coworker relationships/ Peer pressure | 46% |
| For fun/ love to ride                                       | 15% |
| To encourage/motivate coworkers to ride more regularly      | 11% |
| Competition aspect/ Teamwork                                | 7%  |
| To start biking more often                                  | 3%  |
| Join with friends   | 3%  |
| I would have biked anyway                                   | 2%  |
| To be an example to others                                  | 2%  |
| Raffle/ prizes  | 2%  |
| A challenge   | 2%  |
| Previous TBC were great                                     | 1%  |

| Bicyclists (n=67)                             | %   |
|---|-----|
| Did not have time to organize a team/busy     | 22% |
| Could not find teammates/not in a team        | 15% |
| Out of town/vacation                          | 9%  |
| Do not like event                             | 6%  |
| Health reasons/injured                        | 6%  |
| Telecommuter/works from home                  | 6%  |
| Team forgot                                   | 5%  |
| Lack of involvement with a local organization | 5%  |
| Company did not put team together             | 3%  |
| Too much effort                               | 3%  |
| Changed rules/could not participate           | 3%  |
| BART not allowing bikes during rush hour      | 3%  |
| Unemployed                                    | 3%  |
| Unaware                                       | 3%  |
| Website too difficult to use/log in to        | 3%  |
| Other   | 3%  |
| Don't Know                                    | 3%  |



# One-third of those who participated in the TBC now ride more often, as compared with one-quarter of those who participated in BTWD

**2011: Since participating in \_\_\_\_\_, would you say you ride your bicycle... (Bicyclists)**

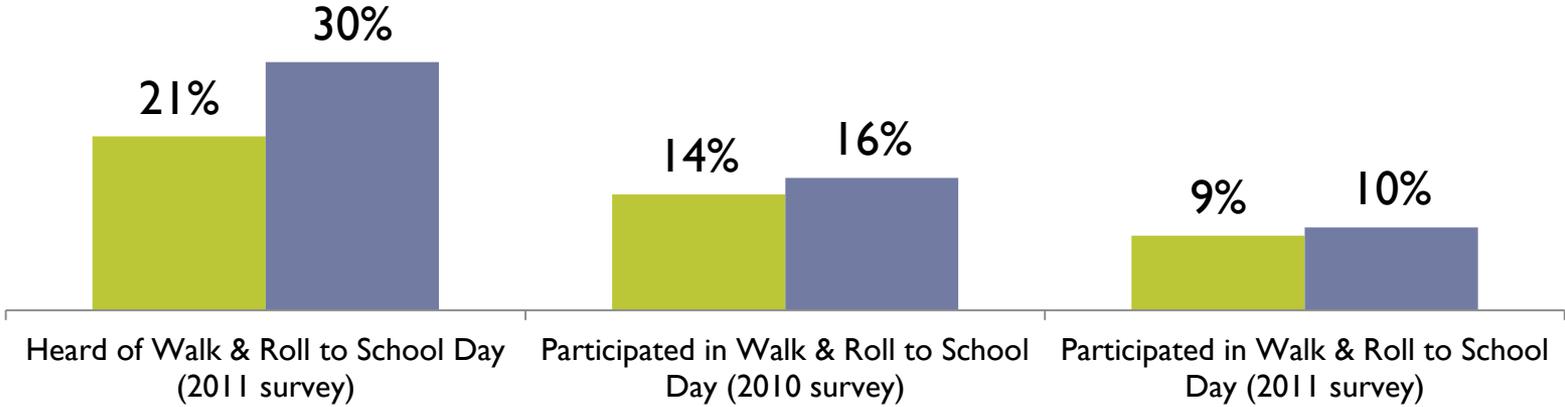




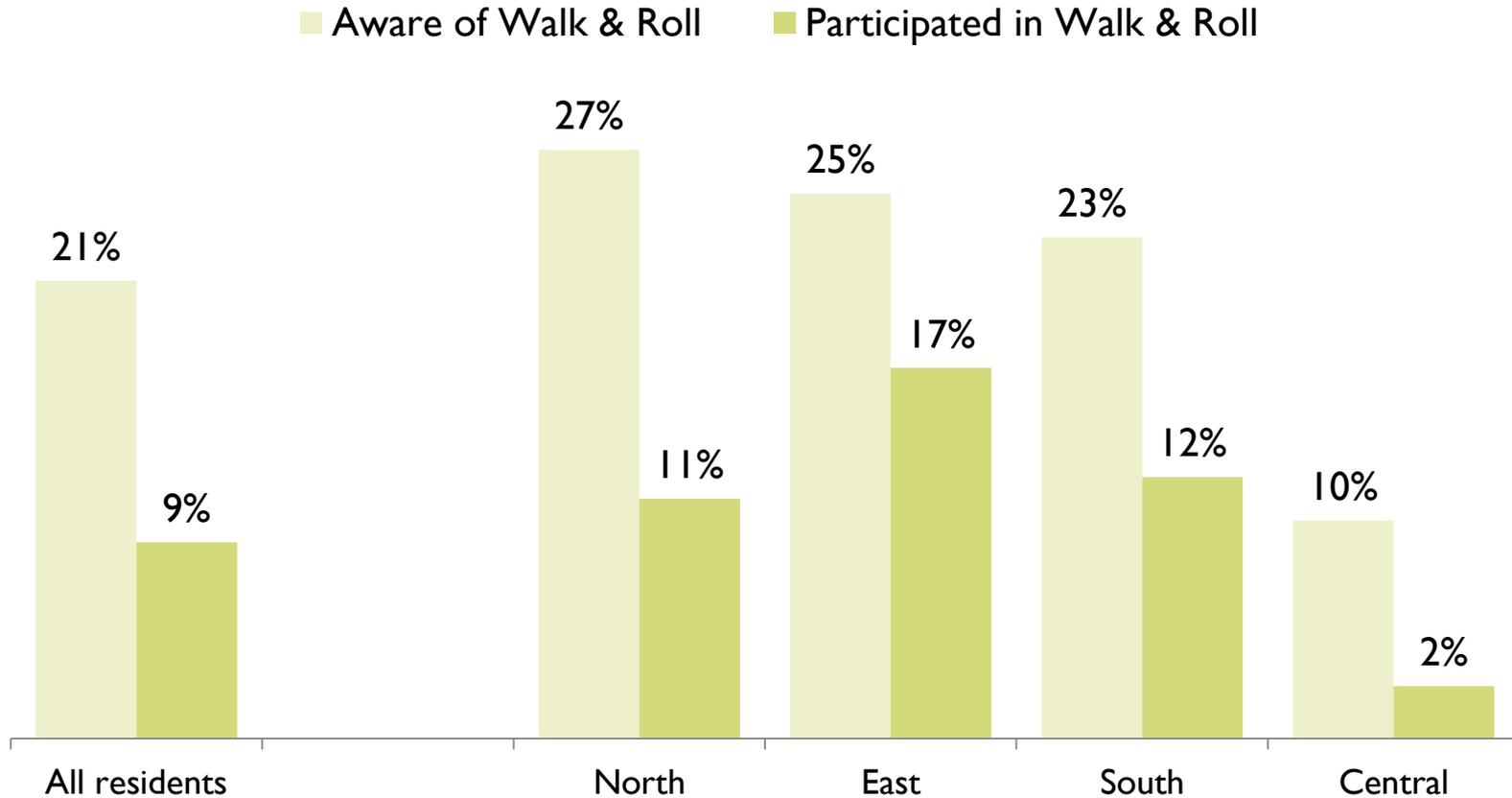
Key Findings:  
Walk & Roll to School Day

# Participation in Walk and Roll to School Day is consistent across both residents and bicyclists

■ Residents survey   ■ Bicyclists survey



# Walk & Roll to School Day awareness is highest in North and East County; Participation is highest in the East



*Note that the web link for the 2011 cyclists survey was distributed partly through Team Bike Challenge participant lists, which may lead to some overrepresentation of TBC participants in survey results.*



# Key Findings: Advertising

# Recall of the campaign is consistent; Bicyclists are more likely to remember seeing ads

*In the past year, do you recall seeing or hearing any advertising with the text “Ride into Life” or “Get Rolling”?\*\**



**\*\*2010 Poll only included “Get Rolling”. “Ride into Life” was added in the 2011 ad campaign.**

Most bicyclists knew the campaign was about bicycling, and one-third in 2011 were able to say without prompting that they were about using a bicycle for every day transportation

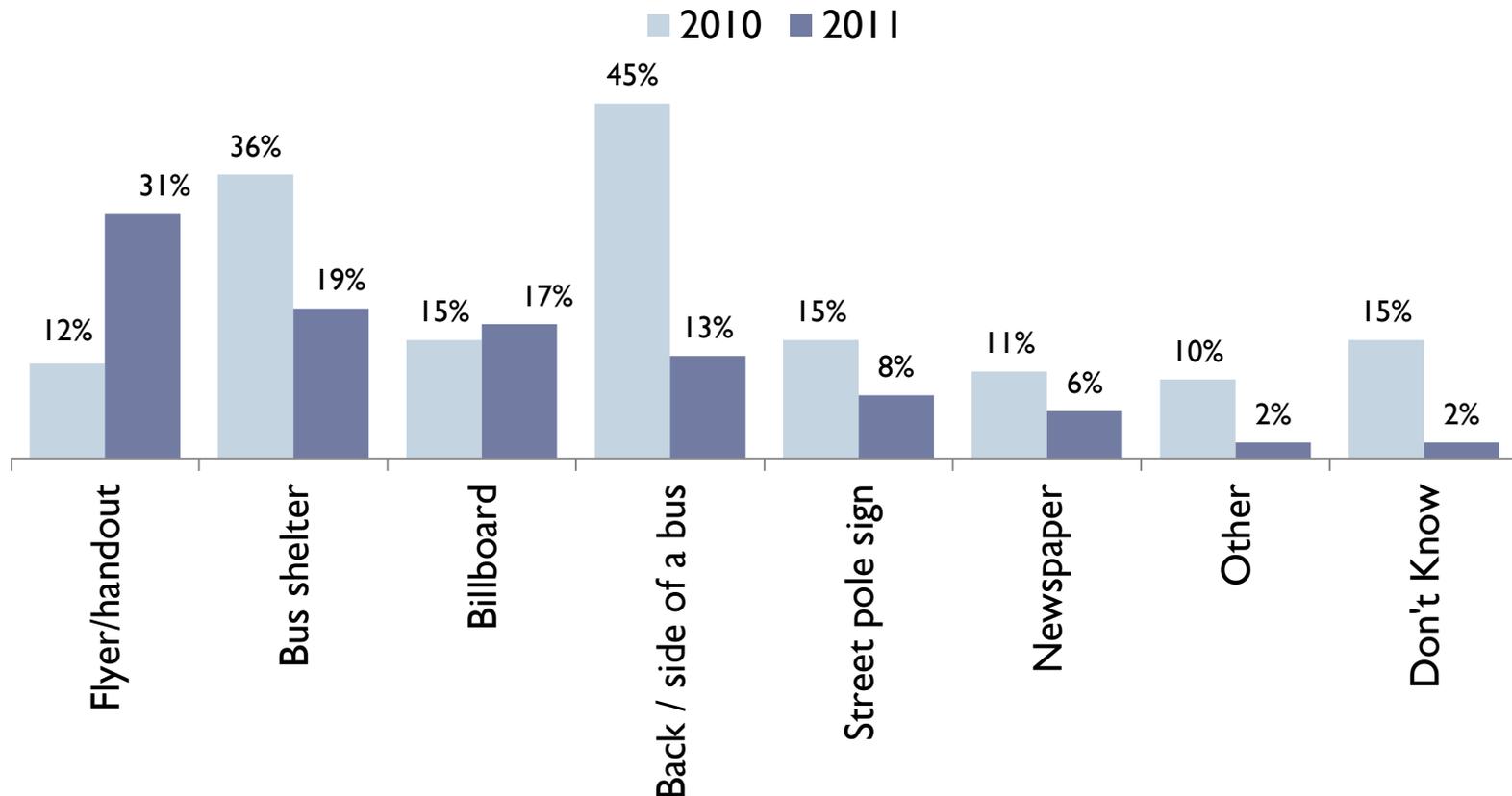
**(Bicyclists)** As far as you can recall, what was the Ride into Life or Get Rolling advertising about? **(Unaided, Open-ended)**

|   | 2010<br>(n=89) | 2011<br>(n=85) |
|---|----------------|----------------|
| Using bike as everyday transportation/multiple purposes | 21%            | <b>33%</b>     |
| Biking  | 28%            | 27%            |
| Bike to Work Day/Month/<br>Biking to work               | <b>32%</b>     | 20%            |
| Using bikes on public transit                           | 6%             | 4%             |
| Recreational biking                                     | 3%             | -              |
| Other/ Don't Know                                       | 19%            | 16%            |

\*\*2010 Poll only included "Get Rolling". "Ride into Life" was added in the 2011 ad campaign.

# Bus and bus shelter advertising was the most visible to bicyclists in 2010; In 2011 flyers and handouts were most visible

**(Bicyclists)** And where do you recall hearing or seeing the Ride into Life or Get Rolling advertisement?  
**(Open-ended – Up to 3 Responses)**



\*\*2010 Poll only included "Get Rolling". "Ride into Life" was added in the 2011 ad campaign.

# Ad Images Shown in Bicyclists' Web Survey

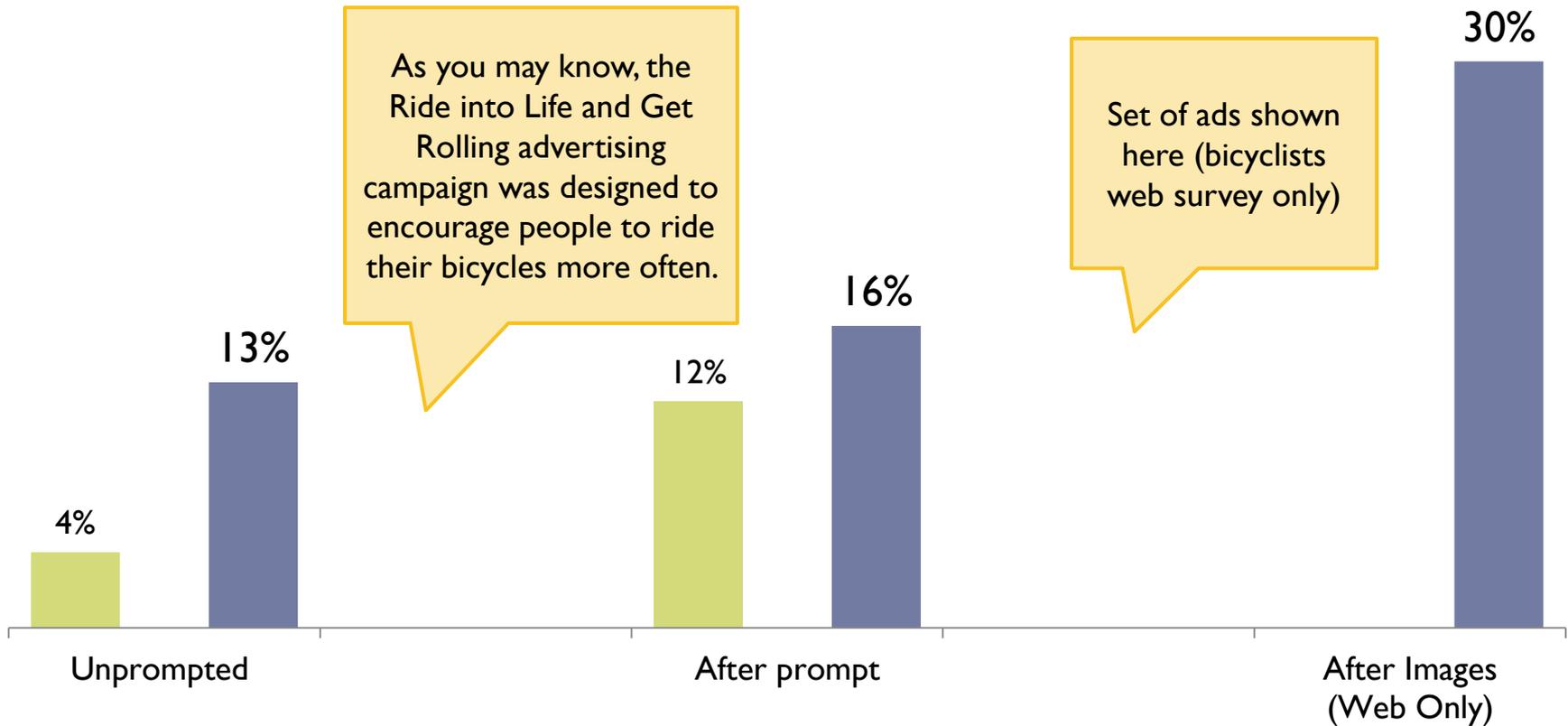
2010

2011

# Recall after prompts remain consistent since 2010

## Recall Seeing Advertisements

■ Residents 2011   ■ Bicyclists 2011

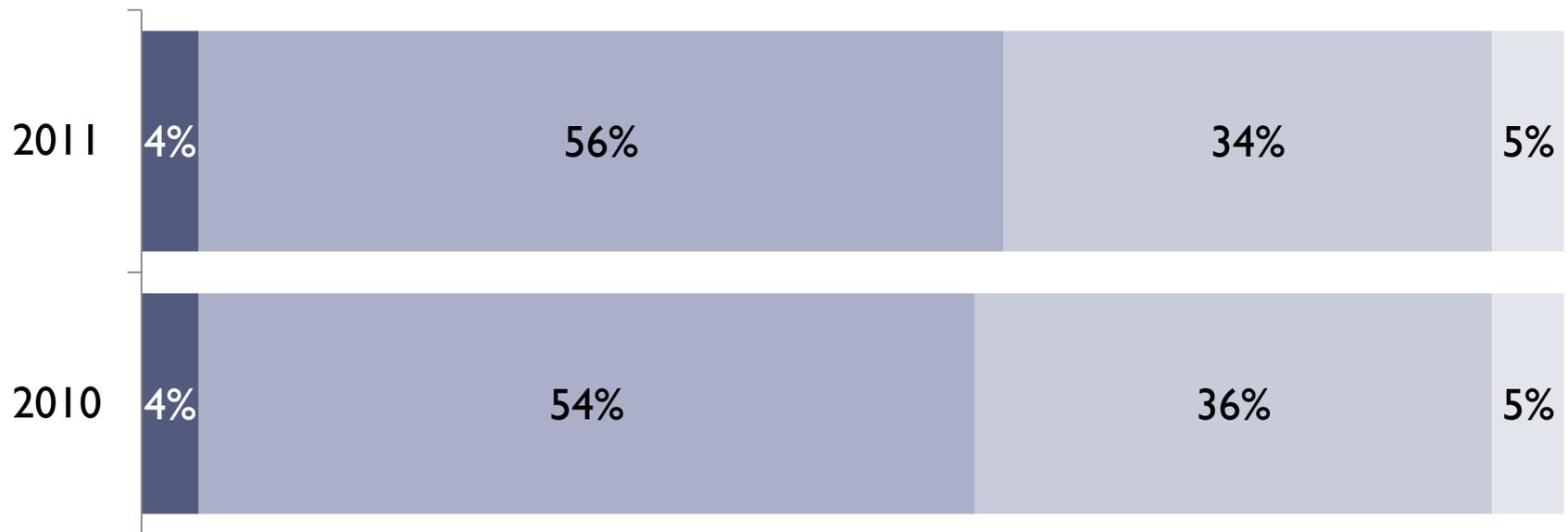


\*\*2010 Poll only included "Get Rolling". "Ride into Life" was added in the 2011 ad campaign.

# A majority of bicyclists find the ads effective

**(Bicyclists, after viewing a sample of the ads)** Thinking about the advertisements shown here, how effective do you believe they are in motivating people to ride their bicycles more often?

■ Very effective ■ Somewhat effective ■ Not very effective ■ Not at all effective



# Gas price images are more compelling in 2011

## (Bicyclists) Most & least compelling parts of ads

| Most effective about ads<br>(Open-ended)<br><b>**Top 6 Responses from 2011</b> | 2010       | 2011       |
|--|------------|------------|
| Images of gas prices/suggestions of saving money                               | <b>22%</b> | <b>37%</b> |
| Images of happy looking people/having fun                                      | 18%        | 9%         |
| Images of using bikes with public transit                                      | 9%         | 9%         |
| Images of average-looking people/regular clothing/no bike gear                 | 7%         | 8%         |
| Commuters biking to work / biking in work clothes                              | 7%         | 7%         |
| Looks easy/normal/fun  | -          | 5%         |

| Least effective about ads<br>(Open-ended)<br><b>**Top 6 Responses from 2011</b> | 2010       | 2011       |
|---|------------|------------|
| Bus ad/lifting bike on bus rack   | -          | <b>12%</b> |
| Not diverse enough/excludes certain groups like seniors/unathletic              | 3%         | 10%        |
| Uninspiring/not enough motivation/unrelatable                                   | 11%        | 9%         |
| Not direct enough/too subtle/ unclear message/ not enough focus on bikes        | <b>15%</b> | 7%         |
| Logos/slogans   | 8%         | 6%         |
| Doesn't address actual reasons people don't bike                                | 10%        | 6%         |

**Bold text** indicates top response



Key Findings:  
Segmentation of Bicyclists &  
Potential Targets

Thirteen percent of county adults in 2010 were identified as committed to bicycling as transportation; One in five are potential targets to increase bicycling behavior

### 2010 Adult Population Segmentation

- Committed Bicyclists
- Stronger likely bicyclists
- Weaker likely bicyclists
- Less Likely Bicyclists
- Unlikely Bicyclists



- ▶ **Committed Bicyclists (13%):** Currently ride a bicycle three or more times per week as transportation to a destination.
- ▶ **Stronger Likely Bicyclists (9%):** Currently ride a bicycle one or two times per week as transportation to a destination.
- ▶ **Weaker Likely Bicyclists (10%):** Currently ride a bicycle less often than once per week as transportation to a destination AND own a working bicycle AND ride a bicycle for health or recreation AND have relatively lower levels of concern about potential barriers to bicycling.
- ▶ **Less Likely Bicyclists (12%):** Currently ride a bicycle less often than once per week as transportation to a destination AND own a working bicycle AND ride a bicycle for health or recreation AND have relatively higher levels of concern about potential barriers to bicycling.
- ▶ **Unlikely Bicyclists (57%):** Do not own a working bicycle OR do own a bicycle BUT do not ride as transportation or for health or recreation.

# 2010 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

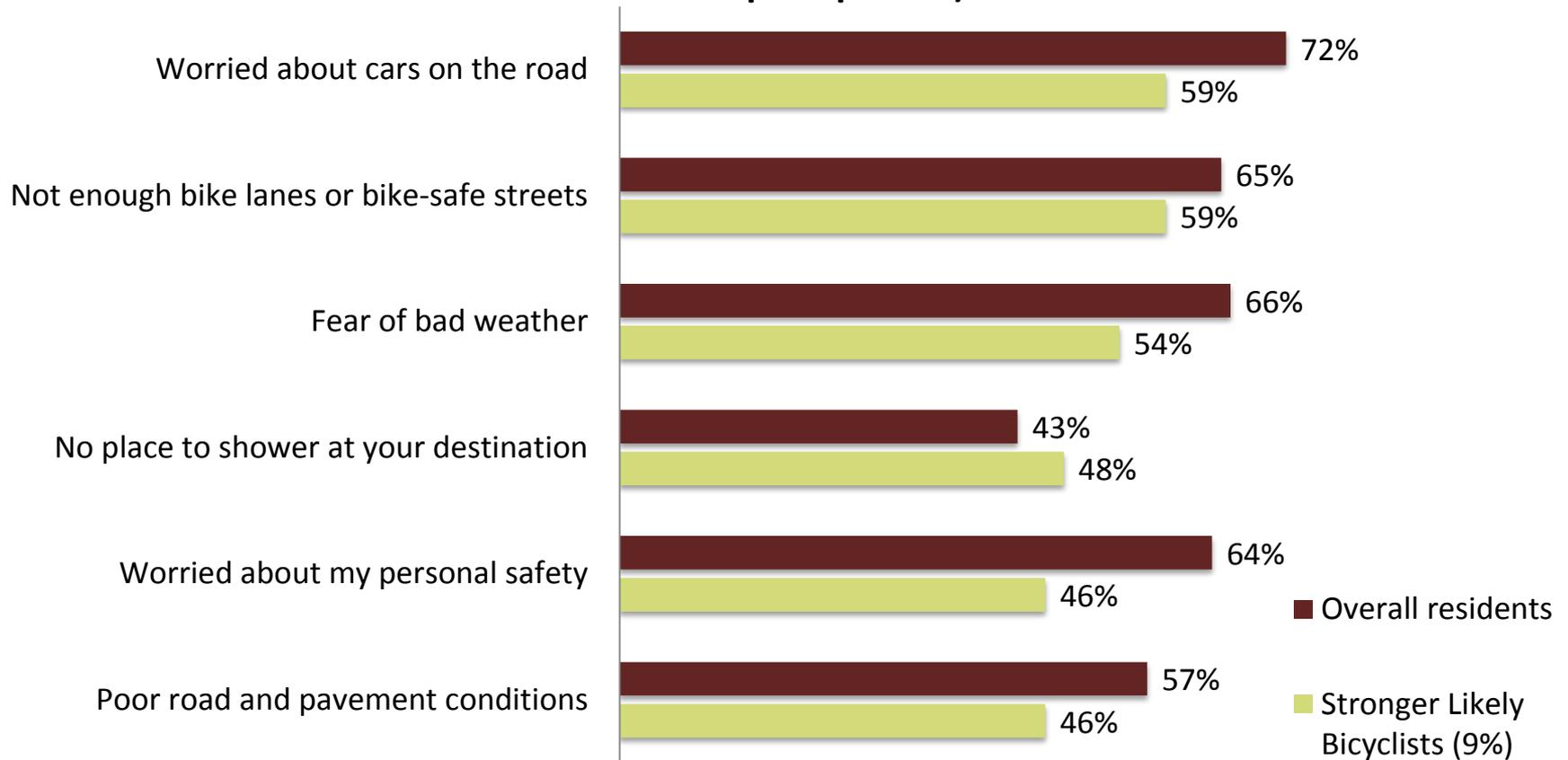
# 2010 Segmentation Demographics

| 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

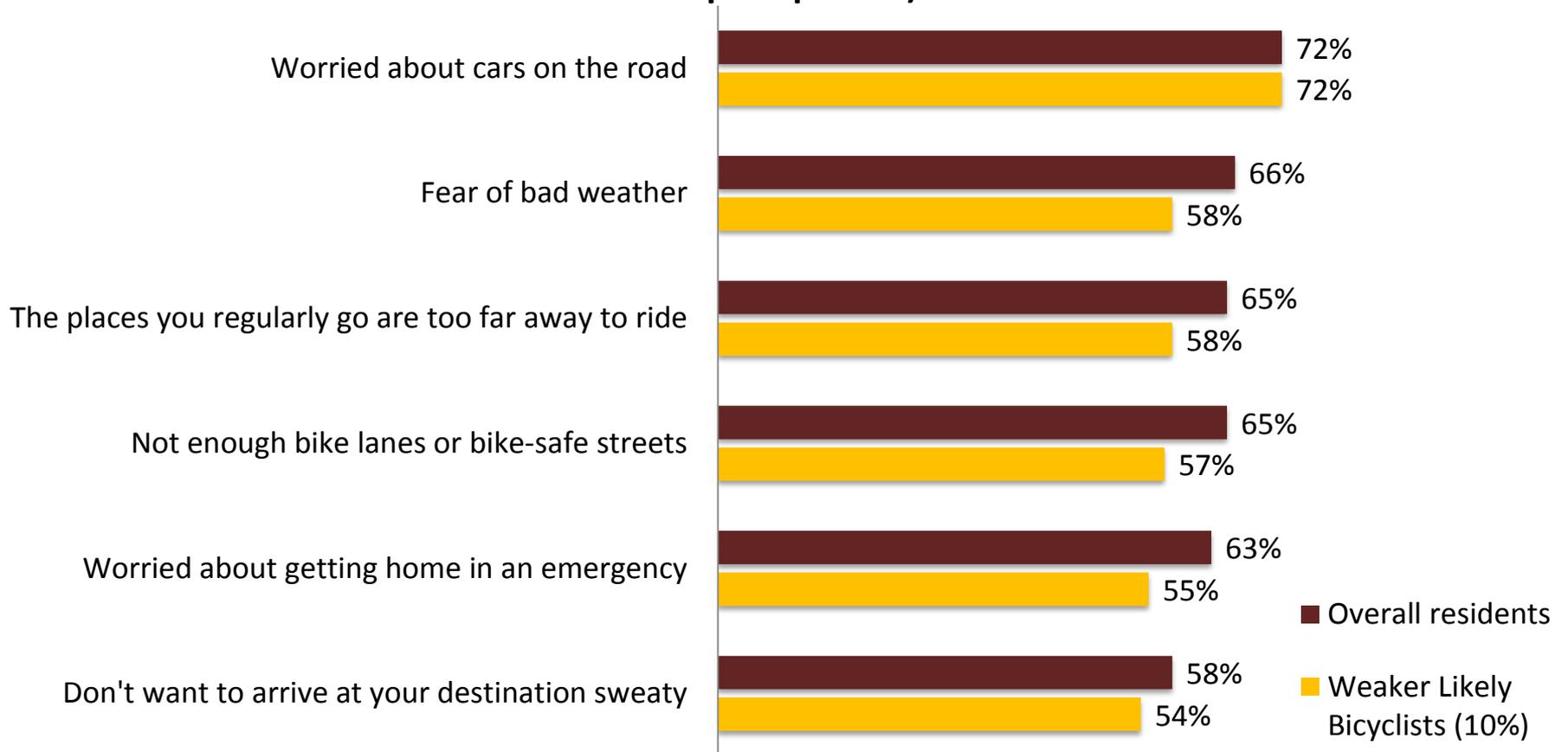
# The most likely group identified to increase bicycling behaviors from the 2010 adult residents survey is most concerned about safety and trip logistics

### Importance of factors in choosing to not ride a bicycle (% Rated Important, Top Responses)



The second most likely group identified to increase bicycling behaviors from the 2010 adult residents survey shares the safety concerns of the first group, but adds distance to the list

### Importance of factors in choosing to not ride a bicycle (% Rated Important, Top Responses)



# In 2011, driving behavior and ease of car trip replacement were used to create a group to focus on for increased ridership

■ Target: Drive a car at least once a week, not difficult to replace one trip with a bike trip   ■ Other



# Those who say it would not be difficult to replace a car trip with a bike trip are more likely to be aged 40-64, minorities, and have children

## **(Residents)** Profile of those who say it would not be difficult to replace one car trip per week with a bicycle trip

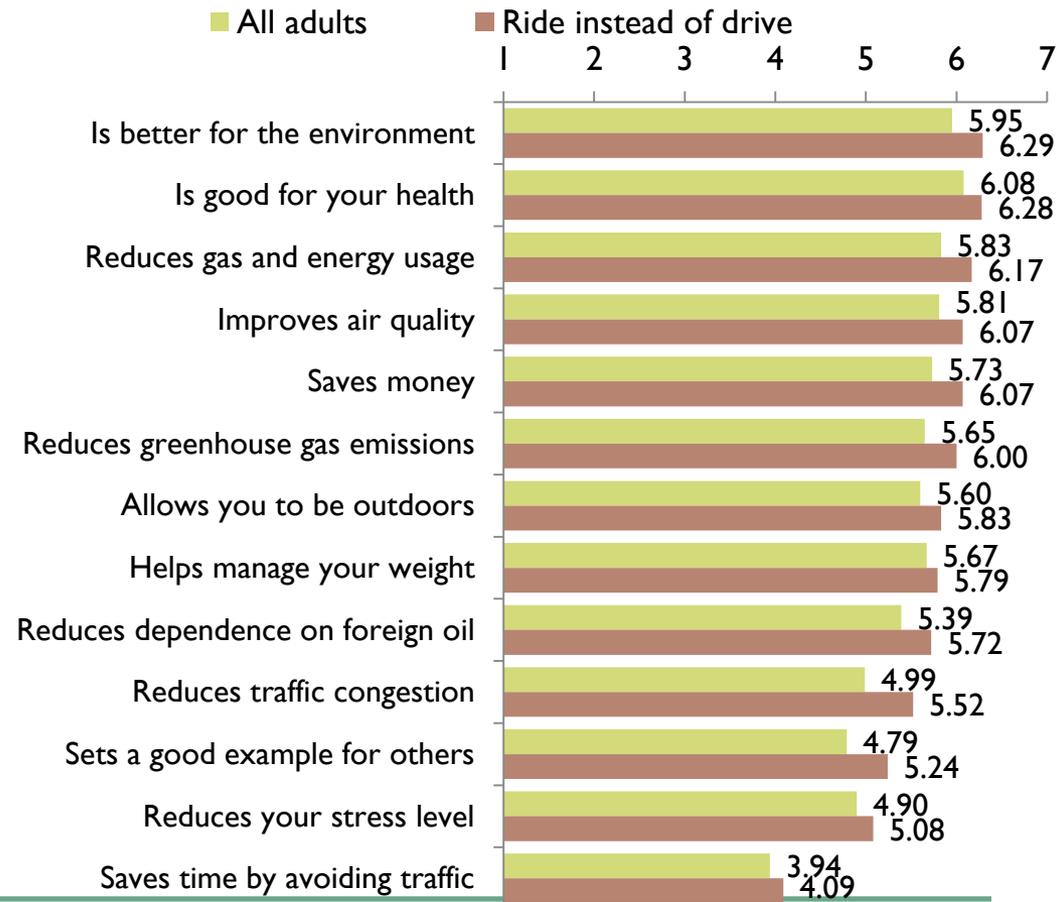
| Group    | All adults | Ride instead of drive (n=83) | Group  | All adults | Ride instead of drive (n=83) |
|----------|------------|------------------------------|--|------------|------------------------------|
| North    | 44%        | 42%                          | Male   | 48%        | 49%                          |
| Central  | 29%        | 32%                          | Female   | 52%        | 51%                          |
| South    | 16%        | 18%                          |  |            |                              |
| East     | 11%        | 8%                           | Kids under 18                                  | 35%        | <b>43%</b>                   |
|          |            |                              |  |            |                              |
| 18-29    | 19%        | 16%                          | Ride a bike at least once a week               | 20%        | 23%                          |
| 30-39    | 21%        | 17%                          | Work outside home at least once/week           | 64%        | <b>71%</b>                   |
| 40-49    | 19%        | <b>24%</b>                   | Ride a bike to work at least once a week       | 7%         | 8%                           |
| 50-64    | 26%        | <b>30%</b>                   | Go to school at least once/week                | 18%        | 20%                          |
| 65+      | 14%        | 12%                          | Ride a bike to school at least once a week     | 4%         | 2%                           |
|          |            |                              | Seen Get Rolling/Ride into Life ads            | 4%         | 4%                           |
| White    | 41%        | 34%                          | Participated in BTWD 2011                      | 2%         | <b>7%</b>                    |
| Asian    | 19%        | <b>24%</b>                   | Ever participated in Walk & Roll to School Day | 9%         | <b>17%</b>                   |
| Hispanic | 17%        | 17%                          |  |            |                              |
| Black    | 11%        | <b>18%</b>                   |  |            |                              |
| Other    | 12%        | 7%                           |  |            |                              |

# Those who say it would not be difficult to replace a car trip with a bike trip tend to find their management less supportive of biking to work

**(Residents)** Profile of those who say it would not be difficult to replace one car trip per week with a bicycle trip

| Group                                      | All adults    | Ride instead of drive (n=83)               |
|--|---------------|--|
| Employer generally supports biking to work | 48%           | 40%  |
| Employer gave out BTWD info                | 20%           | 16%  |
| Management biked on BTWD                   | 21%           | 24%  |
| Posters at work promoting BTWD             | 23%           | 13%  |
| Top reason people don't bike (open-ended)  | Too far (37%) | Difficult/takes too much energy/lazy (32%) |

**(Residents)** How convincing is reason to ride a bicycle as a form of transportation, where **1 means not at all convincing, and 7 means very convincing.**





# Recommendations

# Recommendations: Bike to Work Day

- ▶ **Provide support for employers to promote Bike to Work Day at the workplace, encourage employers to provide bicycle support facilities such as bike parking and showers, and promote communications about bike routes between work and home.** These efforts can all help increase bicycling as a regular commute mode. The workplace is the most common place people got information about Bike to Work Day, most likely reflecting the heavy outreach to employers throughout Alameda County and the region. Bike to Work Day participants had most often heard of Bike to Work Day from their employer. People who did not participate did not receive much information about it from their employers. Workplaces are key partners in supporting biking to work and Bike to Work Day. Helping more employers create a culture where cycling can be easily integrated into worker commutes could help increase cycling in the county.
- ▶ **Build on people's enthusiasm for sharing about their participation in Bike to Work Day with friends, co-workers and classmates.** Many participants felt pride in their Bike to Work Day participation, shared it through social media, and discussed it with friends and coworkers. Encouraging this type of sharing can help spread the word about Bike to Work Day.

# Recommendations: Bike to Work Day

*(continued)*

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- ▶ **Spread more Bike to Work Day activities and advertising to South and East Alameda County.** There is a good deal of potential for increasing bike riding and participation in Bike to Work Day in the South and East County, where riding a bicycle is not as common as a form of transportation as it is in North County.
  
- ▶ **Team Bike Challenges and Walk and Roll to School Day are opportunities to reach throughout Alameda County.**
  - ▶ Participants in the Team Bike Challenge (TBC) are more likely to increase future bicycling frequency than the rest of Bike to Work Day participants; however, finding a team or teammates has been a challenge for some past TBC participants. Facilitating TBC team formation can encourage more people to bike ride more often.
  - ▶ Walk and Roll to School Day participants come from throughout the county, with the highest participation rates coming from East Alameda County. The Walk and Roll to School Day event presents an opportunity to communicate about bicycling with a group that sometimes sees it as too difficult to fit into their daily lives.

# Recommendations: Advertising

- ▶ **Continuing to run image-based advertising similar to the current approach, at least at the current funding levels, increasing the number and placements of advertisements, and using a variety of messages and tactics to target most likely bicyclists throughout the county should help put cycling in mind as a viable option for transportation.** The current image-based advertising campaign is effective at communicating about bicycling as a mode of transportation, for those that have seen the ads. Delivering more ads to the populations most likely to increase their bicycling behavior is the most cost-efficient way to use limited resources to the greatest potential benefit.
- ▶ **Continue to place ads in highly visible places. Ads on buses** were highly visible in 2010, and flyers and handouts were most commonly recalled in 2011.
- ▶ **In areas of the county where there bus service is not as prevalent, such as the East and South County, other locations for ads or approaches for different types of marketing should be sought.** Ads in these areas could also be complemented by other marketing approaches, such as increasing outreach to businesses and schools through the Team Bike Challenge and Walk and Roll to School Day.

# Recommendations: Advertising

*(continued)*

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- ▶ **The most compelling messaging and images about bicycling are those that communicate the potential to save money and the environment while improving personal health.** While some of the current images are communicating the money-saving potential (such as the image with high gas prices), more clearly connecting bicycle riding with money savings, the environment, and a healthy lifestyle would encourage more people who are “on the fence” to integrate cycling more into their regular travel habits.
- ▶ **A focus on increasing riding by people who are currently bicycling is likely to be a more effective strategy for reducing vehicle traffic and increasing bicycling than attempting to convert non-cyclists.** Those who are already bicycling on occasion, for any reason, are more likely to view cycling as a viable mode of transportation than those who are not currently bicycling.

# Recommendations: Advertising

*(continued)*

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- ▶ **Communications about bicycling logistics and using the right gear can help make those in the identified target groups to feel more comfortable thinking of bicycling as a form of transportation.** Many in the target groups are concerned about safety riding with cars, distance, weather, and showering issues. These issues can be addressed in communications about gear (for safety and visibility, for bad weather, and for staying cool and sweat-free during the commute) and logistics (to help those concerned about effort or distance find solutions that allow them to commute more easily by bicycle). These types of messages could either be incorporated into the overall ad campaign, which focuses on potential savings, environmental benefits, and healthy lifestyles, or they could be addressed through events or promotions about biking throughout the year and during Bike Month in May.

# Recommendations: Additional Approaches

- ▶ **Bicycle safety infrastructure improvements should be pursued to encourage more cycling.** The safety of cycling is a major concern across the board. This concern appears to be related more to riding with cars on the roads and lack of bicycle facilities (like bicycle lanes and bicycle paths) than it is to the bicyclists' concern of their bike riding skills. Facilities that separate cars from bicyclists, such as bike lanes and bike paths, were more frequently mentioned as making people more likely to ride than other facility improvements. The need for safe and secure bicycle parking also rose to the top as a major barrier to biking to work.
- ▶ At the same time, **finding ways to help cyclists be more comfortable on the road**, such as through bicycle safety education classes for all ages, would help lower one major barrier to cycling.
- ▶ **When marketing bike safety classes, a greater focus on riding confidently and safely with cars on the road, with less focus on how to handle a bike, would appeal to a wide range of potential participants and address some of the barriers felt by the target groups.** Some of the target groups report that riding with cars on the road is one of their greatest concerns about bicycling more often as a form of transportation. Communicating that bike safety classes will give them tools and strategies for safely sharing roadways with cars can boost participation in classes, and lead to increased bicycling.