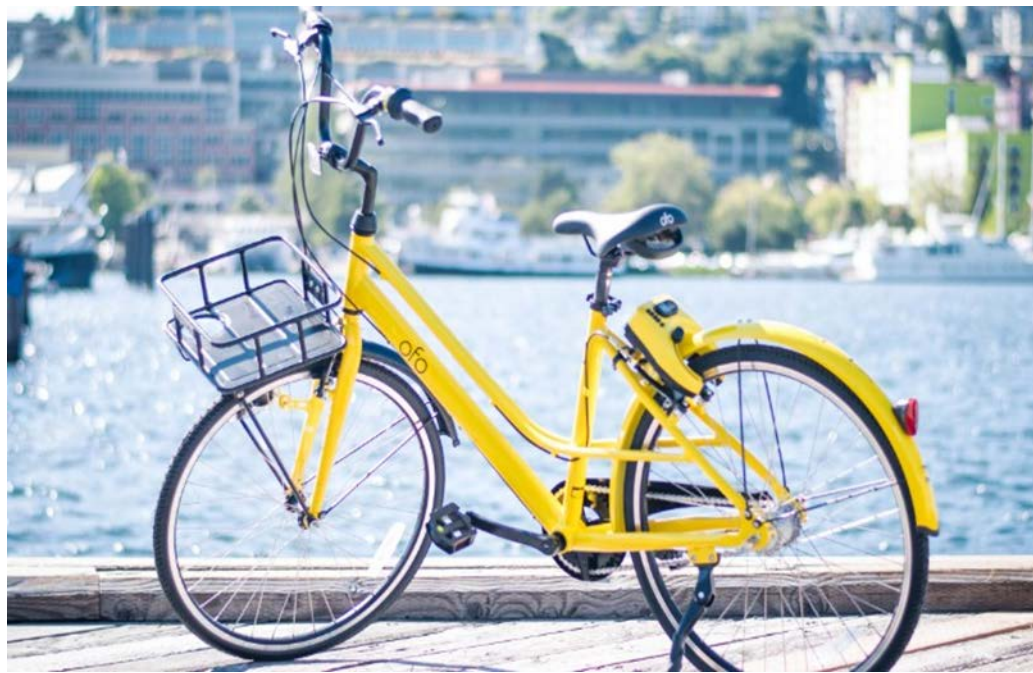


# APPENDIX C

## EMC Survey Report





# Seattle Department of Transportation Web Panel Survey February 2018

- ▶ Web panel survey of residents age 18+ in Seattle, Washington
  - Conducted February 13-24, 2018
- ▶ A total of 601 interviews were conducted citywide
- ▶ Data weighted to reflect the overall demographic makeup of adult residents of Seattle on gender, age, race/ethnicity, and region of the City
  - Because web panel surveys rely on non-probability samples, a classical margin of error cannot be calculated. However, every effort was made to collect data that looks representative of the population. If we assume the sample is representative, for a comparable random sample survey, the margin of error for 601 completed surveys would be +/- 4.0 percentage points

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

- ▶ Web panel surveys are an efficient and cost-effective alternative to traditional methods of obtaining a representative sample of residents
  - Web panel surveys are far less expensive than RDD (Random Digit Dialing) and can be completed much more quickly than ABS (Address-Based Sampling), making it an ideal methodology for projects with time and budget constraints
- ▶ Web panel surveys draw a representative sample from panel databases of individuals who have been recruited to participate in occasional research studies
  - EMC uses *Research Now*, which is a recruit-only (not opt-in) panel vendor recognized by the market research industry as a leading digital data collection provider and which maintains one of the largest representative and highest quality audiences in the industry
- ▶ Panelists receive small incentives, like points toward restaurant gift certificates, for taking surveys; respondents are *not* given an incentive to respond in a certain way
- ▶ Multiple methods are used to ensure quality responses including participation limits and removal of speeders



- ▶ To obtain a representative sample, invitations are sent to a random sample of qualified respondents (in this case, adult residents of Seattle) from the larger panel
  - To avoid self-selection bias, invitations do not reveal the survey topic
- ▶ Throughout the fielding period, demographics are monitored to ensure we achieve a sample that is representative of the broader population of adults in Seattle with minimal weighting adjustments
  - Additional invitations are sent to specific demographic subgroups as needed to achieve a final sample that is demographically and geographically representative
- ▶ In considering the results, it is important to keep in mind that online surveys by nature exclude people without internet access from participating; therefore, the sample cannot be considered a perfect representation of all adult residents of Seattle

# Demographic Comparison

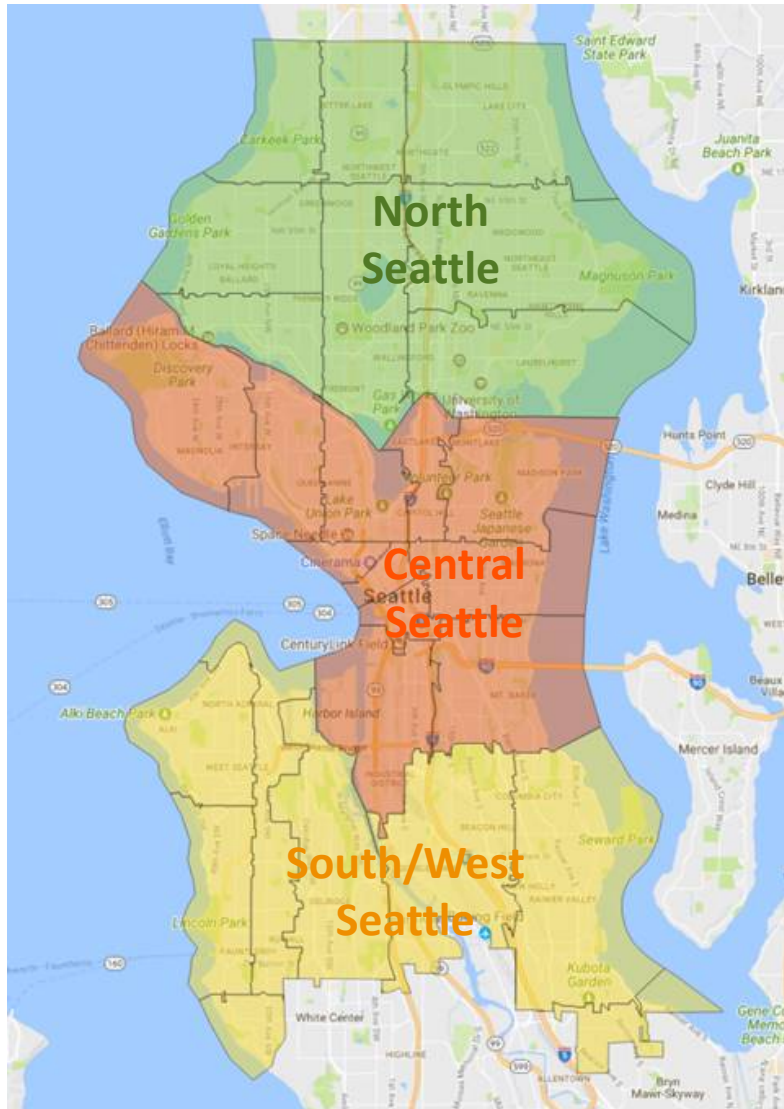
		2016 ACS Estimates (Seattle Adults)	Survey Respondents
Gender	Men	50%	49%
	Women	50%	50%
	Non-binary	NA	1%

Age	18-24	13%	12%
	25-34	26%	26%
	35-44	19%	19%
	45-54	15%	15%
	55-64	13%	13%
	65+	14%	15%

		2016 ACS Estimates (Seattle Adults)	Survey Respondents
Race/Ethnicity	White/Other	66%	67%
	Hispanic	7%	7%
	Asian	15%	15%
	African American	13%	11%

Region	North Seattle	41%	41%
	Central Seattle	36%	36%
	South/West Seattle	23%	23%

# Regions of Seattle



Region	Included Zips	% of Responses
North Seattle	98103, 98105, 98107, 98115, 98117, 98125, 98133, 98177	41%
Central Seattle	98101, 98102, 98104, 98109, 98112, 98119, 98121, 98122, 98134, 98144, 98164, 98199	36%
South/West Seattle	98106, 98108, 98116, 98118, 98126, 98136, 98146, 98178	23%

# Key Findings

- ▶ About half of Seattle residents have been on a bike at least once in the last six months — most commonly for exercise or recreation.
  - At the same time, a quarter can ride but aren't comfortable riding in Seattle, and another quarter are only comfortable separated from traffic.
- ▶ There is widespread (70%) familiarity with the bike share program, and perceptions of the program are positive (74% Favorable).
- ▶ A third have already taken advantage of the current bikeshare program and another third are open to using it in the future, seeing it as a carbon-reducing and fun way to get around.
- ▶ Regardless of their own interest in becoming bike share users, Seattleites recognize the positive impacts to the broader community of having bike sharing (e.g. environmental benefits and reduced traffic), as well as the benefits to users themselves.
- ▶ Seattleites feel the program's biggest drawbacks are bike shares in places where they don't belong or in the way of others, as well as concern for riders not wearing helmets or following the rules.
- ▶ A host of potential improvements to the bike share system have the potential to draw in new users; electric assist bikes are clearly the top feature.

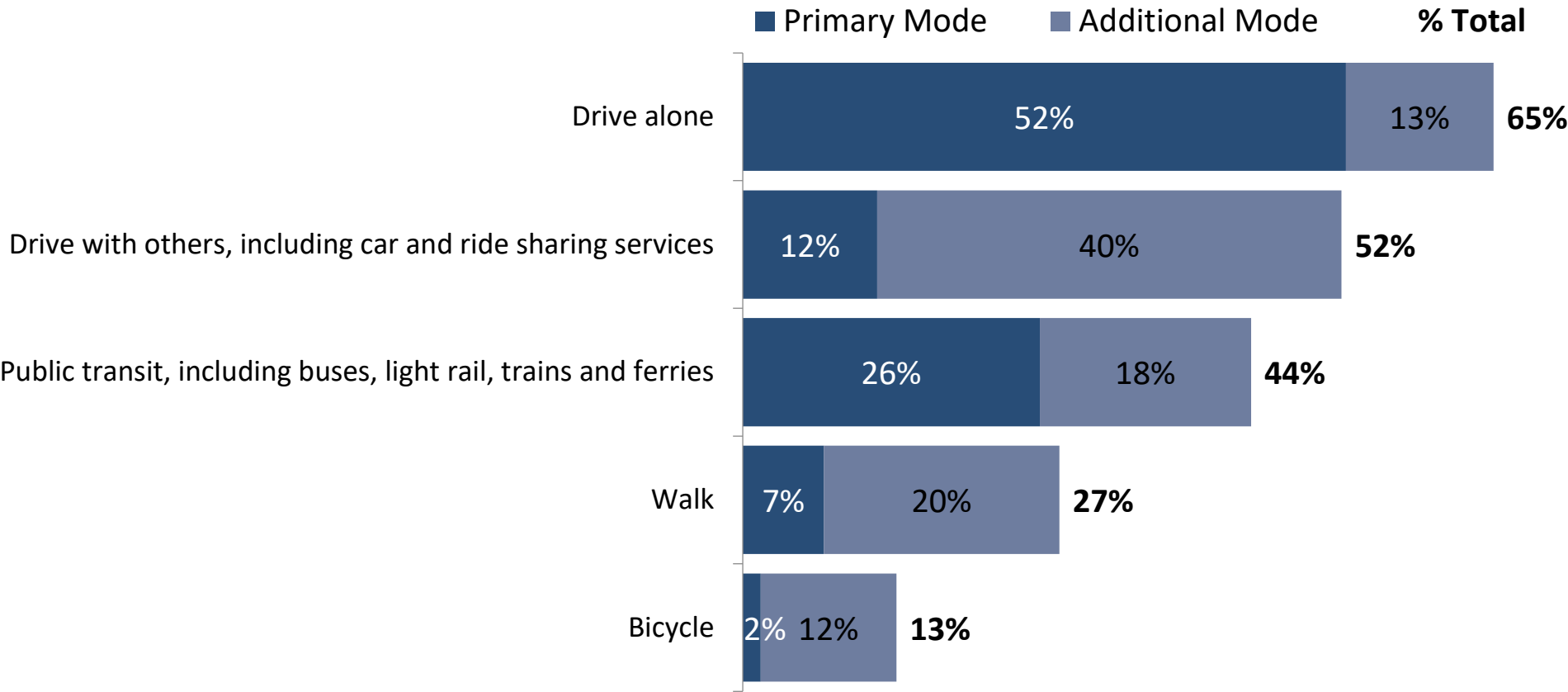




## **Bike Use & Attitudes**

# Modes of Transportation

*Just over half cite driving as their primary mode of transportation and a quarter primarily use public transit. Only two percent rely on biking as their primary mode, and just thirteen percent regularly commute by bike.*

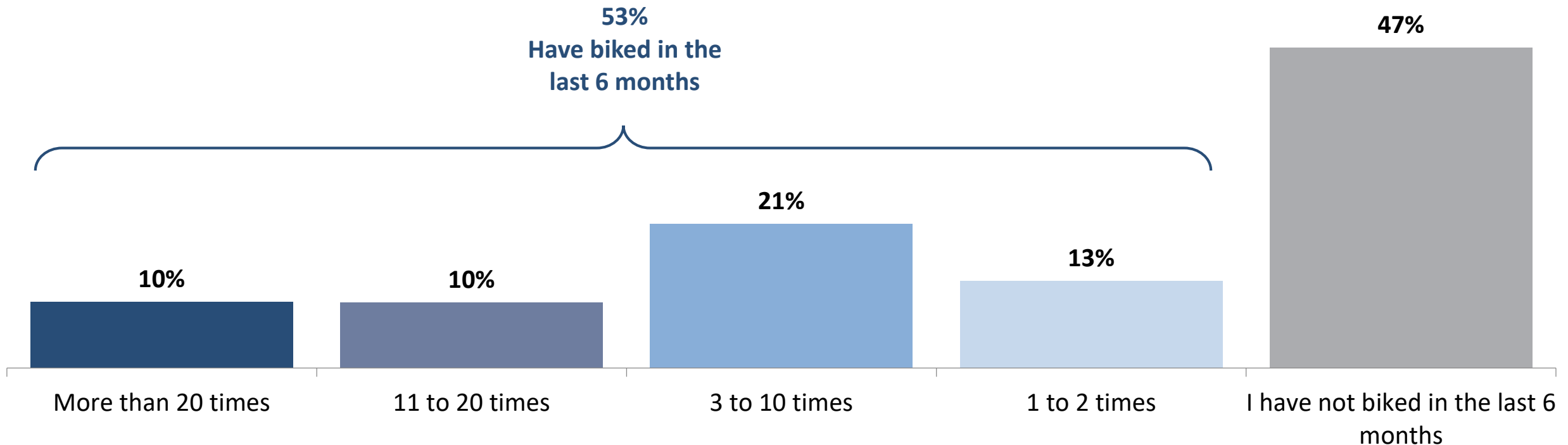


Q5. In general, how do you typically get to work, school, or other places that you travel to regularly? (Multiple Responses Accepted)  
Q6. Of all the ways you get around, which one would you consider your primary mode, meaning the one you use the most often?

# Biking Frequency

*Just over half say they've biked at least once in the last six months.*

In the last six months, about how many times have you ridden a bicycle (including your own bike or a bicycle that was part of a bike share program)?



# Bike Use

*Just over half ever bike within Seattle, for any purpose. A plurality of residents have biked for exercise/recreation at some point, while the percentage that bikes for utilitarian purposes is smaller.*

## Do you ever ride a bicycle within Seattle...

For exercise/  
recreation  
(round trip  
without a  
specific  
destination)  
41%



To run  
errands, like  
go to the  
store or the  
bank  
19%



To go to  
work  
16%



To go to  
restaurants,  
bars, or  
parties  
11%



To go to  
school  
8%

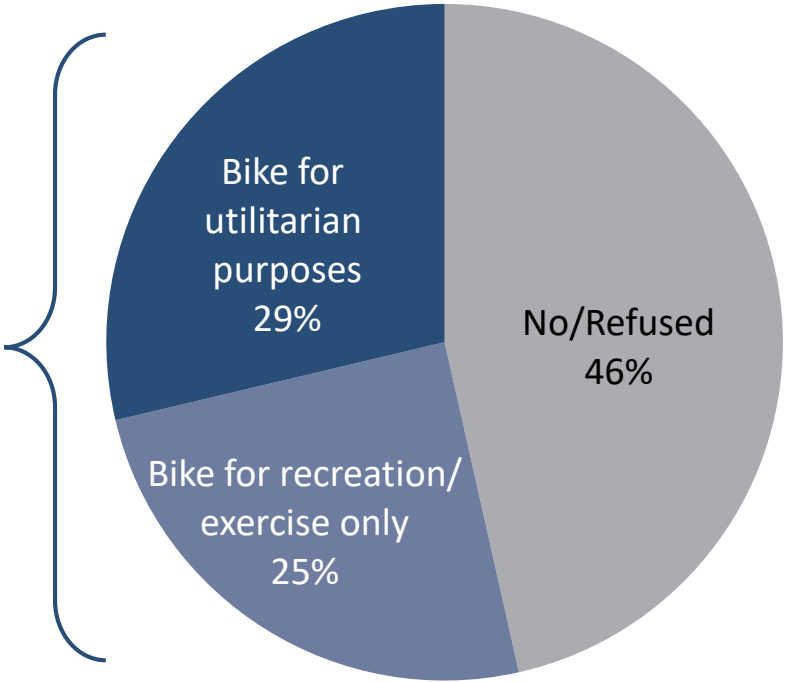


I never ride a  
bicycle within  
Seattle  
46%



Ever bike  
in Seattle  
(for any  
reason)  
54%

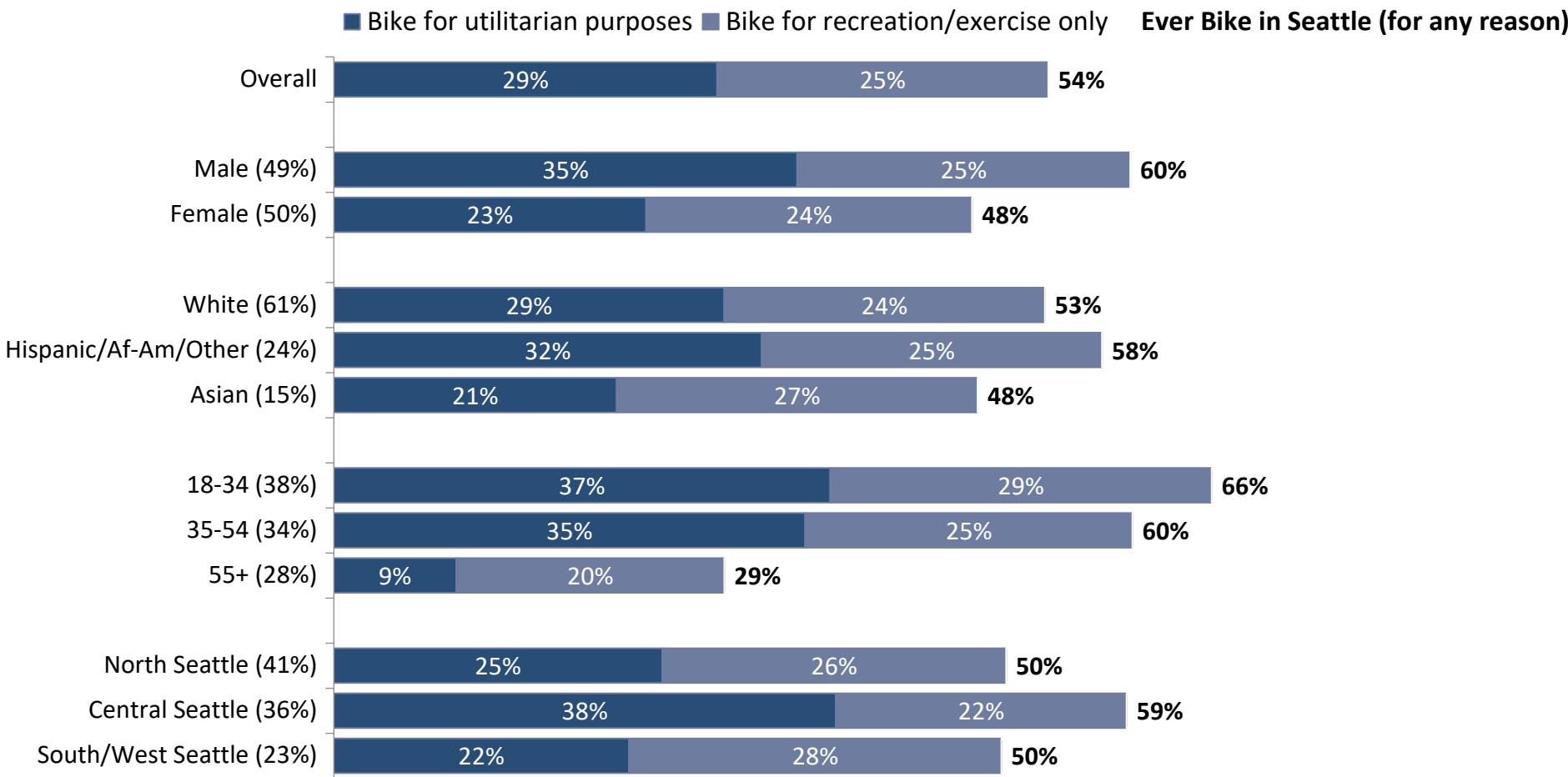
## Ever Bike in Seattle



Q7. (Multiple Responses Accepted)  
\*“Yes, for utilitarian purposes” reflects the percent of residents who ever bike to run errands, go to work, go to restaurants, or go to school.  
“Yes, for recreation/exercise only” reflects the percent who bike for exercise/recreation, but not for any utilitarian purposes. The combined percent for both “Yes” categories is less than the sum of each individual response because Q7 allowed for multiple responses.

# Bike Use by Demos

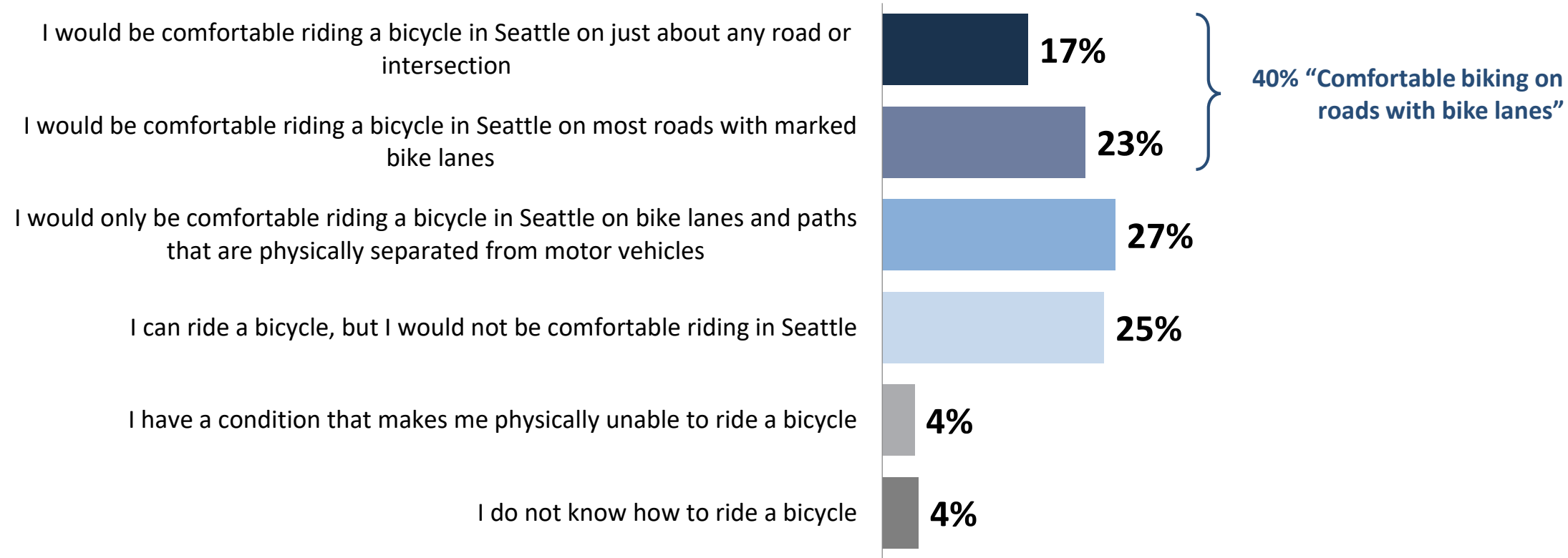
*Men, those in Central Seattle, and younger residents are those most likely to bike for utilitarian purposes in Seattle.*





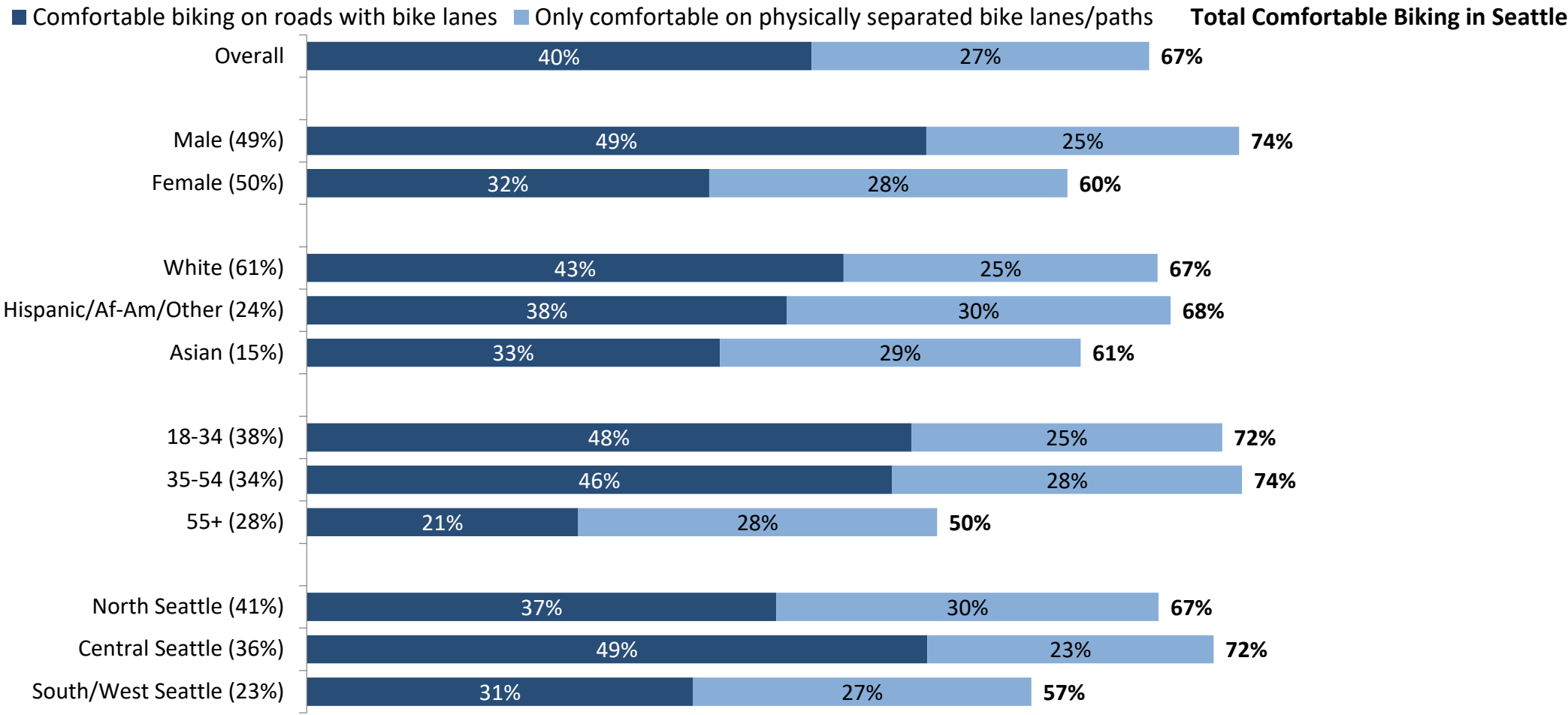
# Comfort with Biking

*Forty percent are comfortable biking in Seattle at least on roads with marked biked lanes. A quarter are only comfortable on physically separated bike lanes and paths and another quarter say they aren't comfortable riding in Seattle at all.*



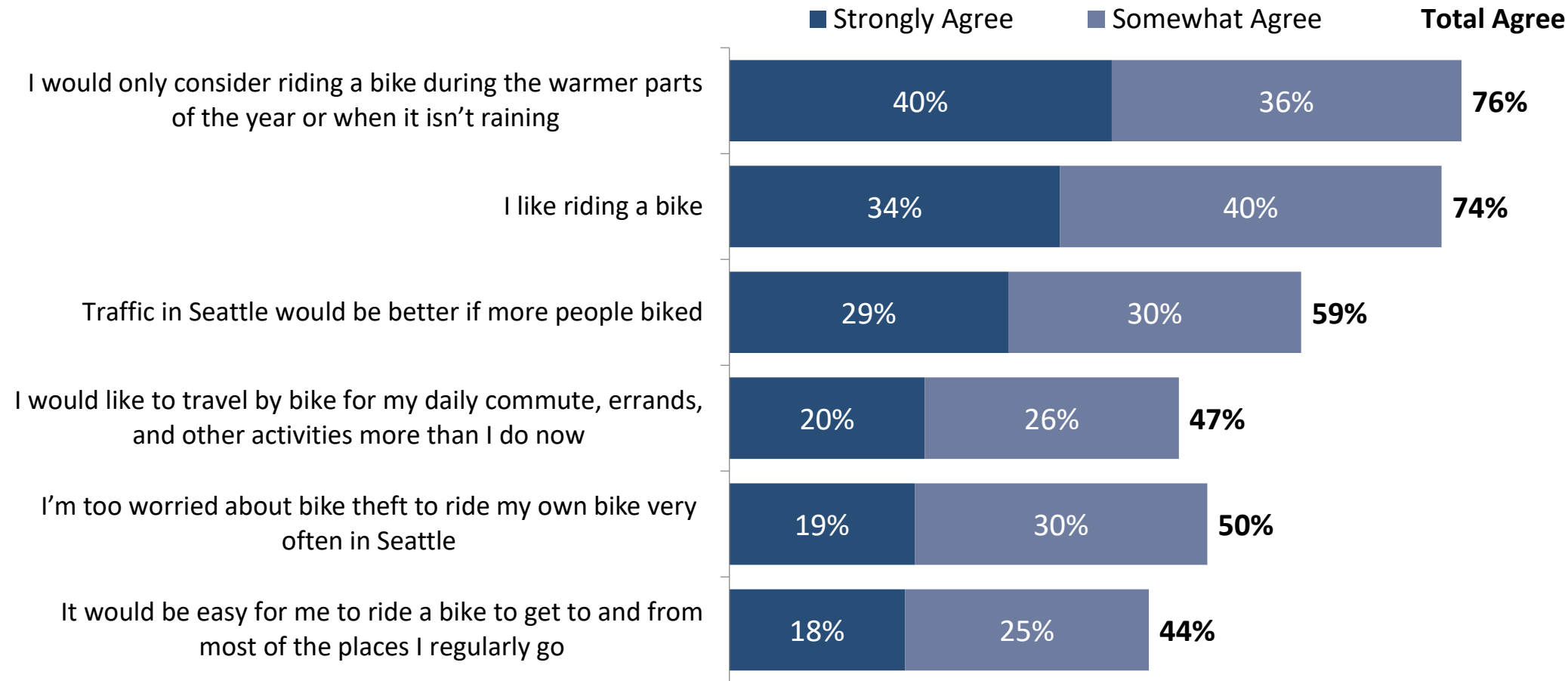
# Comfort with Biking by Demos

*Men and younger Seattleites are more comfortable on roads with bikes lanes than women and those over fifty five.*



# Biking Perceptions

*Most say they like riding a bike, but the vast majority are fair-weather bikers and only a minority believe it would be easy to bike for many of their regular trips.*



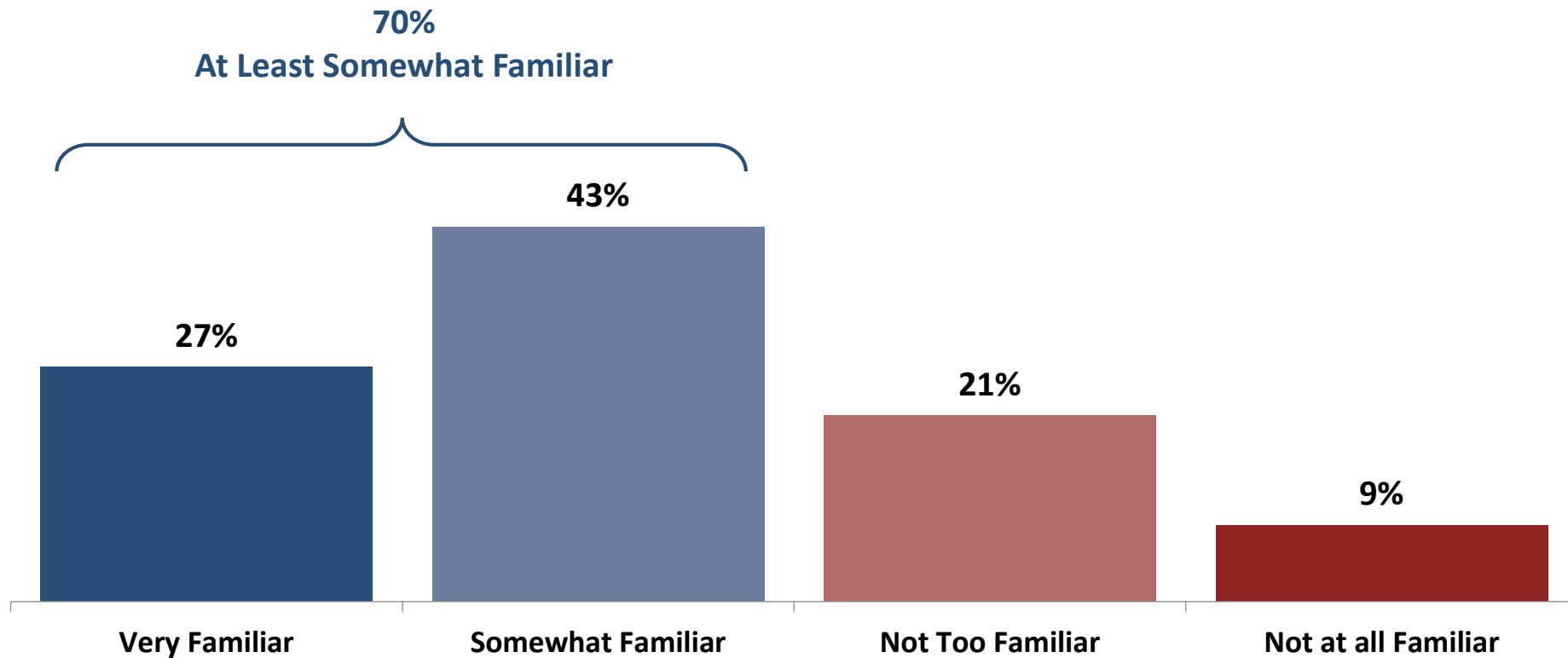
Q9-14. Please indicate whether you agree or disagree with each of the following statements, regardless of if you currently own a bike or ride frequently.



# Perceptions of Bike Share Programs

# Familiarity with Bike Share Programs

*Most are at least somewhat familiar with Seattle's bike share programs.*

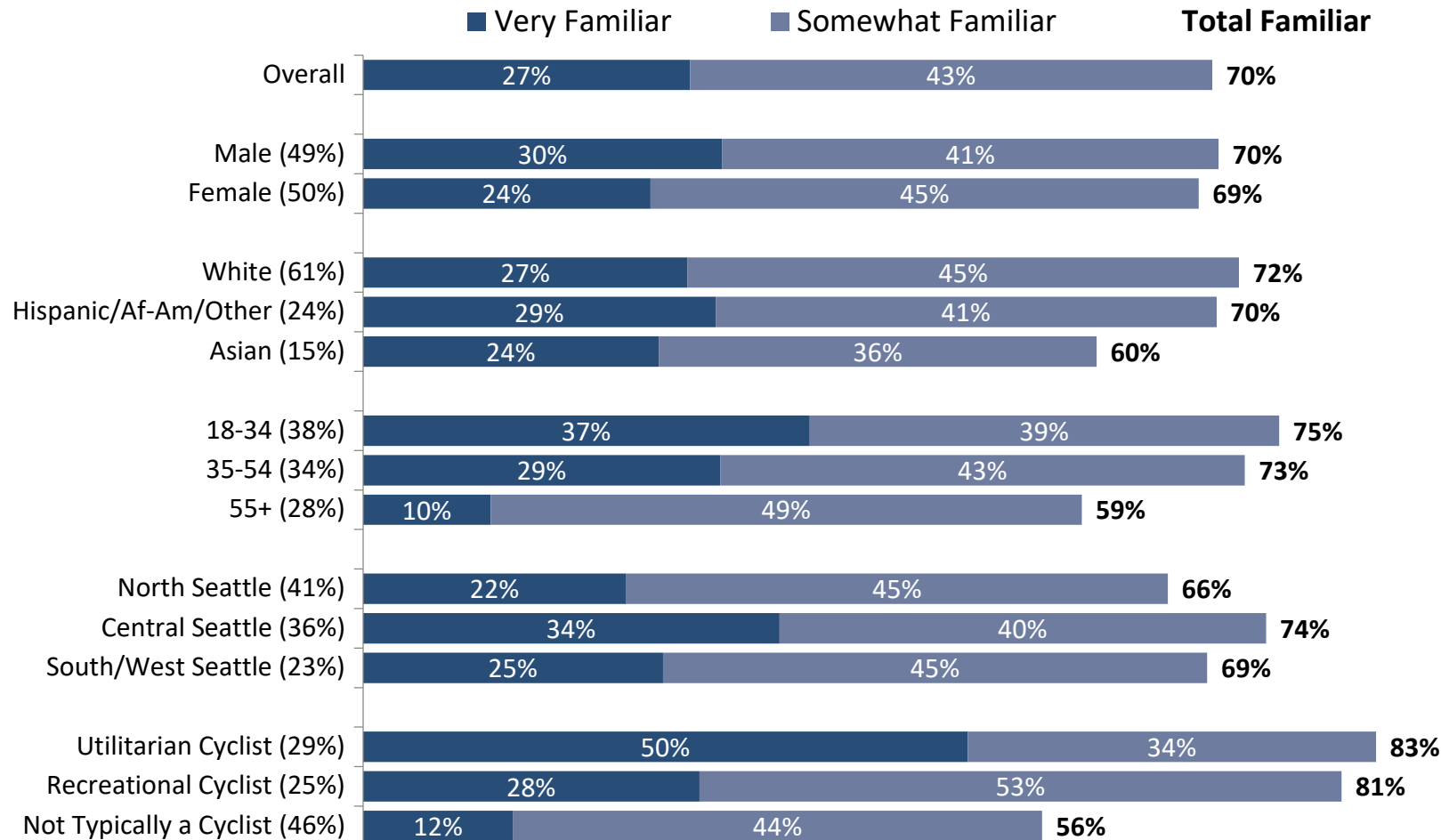


Q15. Currently, three companies — LimeBike, ofo, and Spin — operate free-floating, dock-less bike share programs in Seattle, where riders can rent one of the green, yellow, or orange bikes you may have seen around town using a smartphone app. How familiar would you say you are with these bike share programs?



# Familiarity with Bike Share Programs by Demos

*Familiarity is highest among younger residents and those who are bike for utilitarian purposes.*



Q15. Currently, three companies — LimeBike, ofo, and Spin — operate free-floating, dock-less bike share programs in Seattle, where riders can rent one of the green, yellow, or orange bikes you may have seen around town using a smartphone app. How familiar would you say you are with these bike share programs?

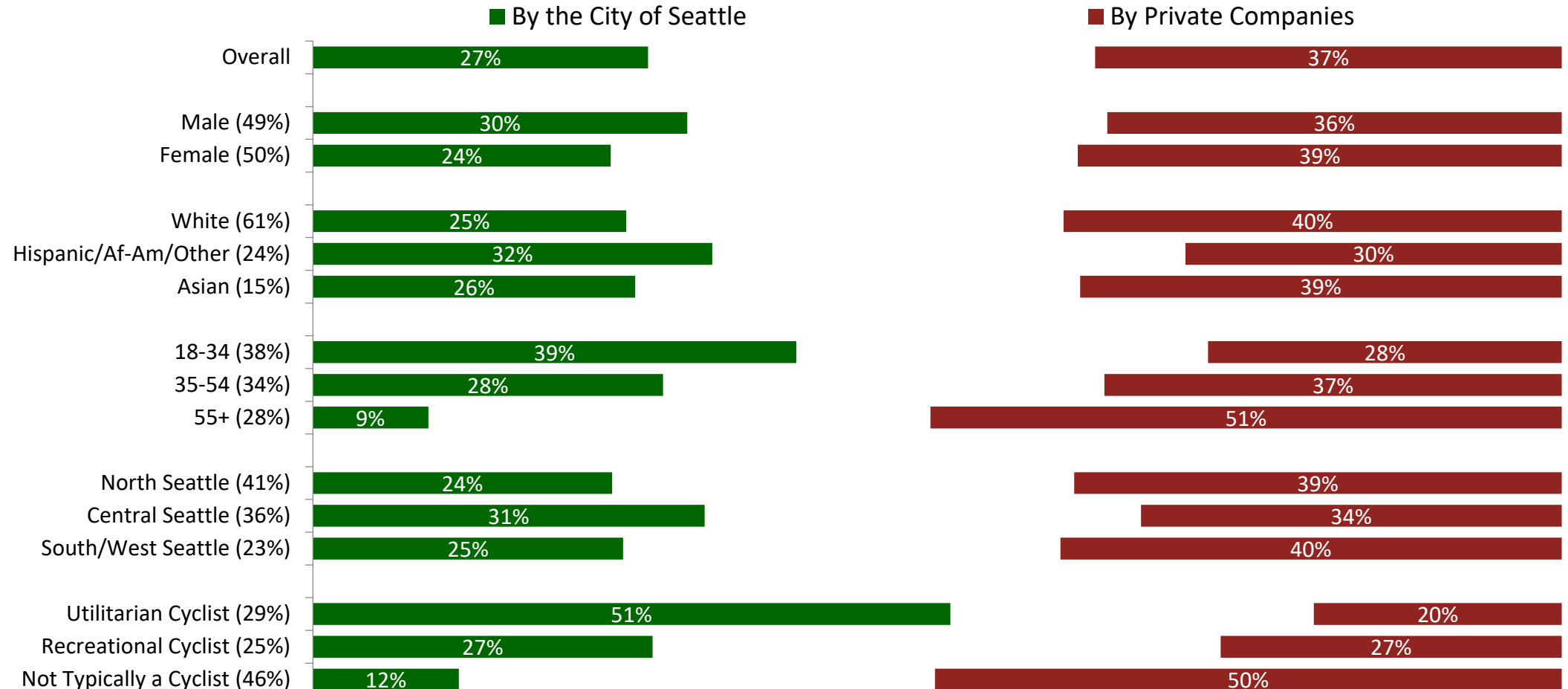
# Familiarity with Bike Share Funding

*There is a great deal of confusion about how Seattle's existing programs are funded. A third aren't sure and over a quarter believe they are funded by the City.*



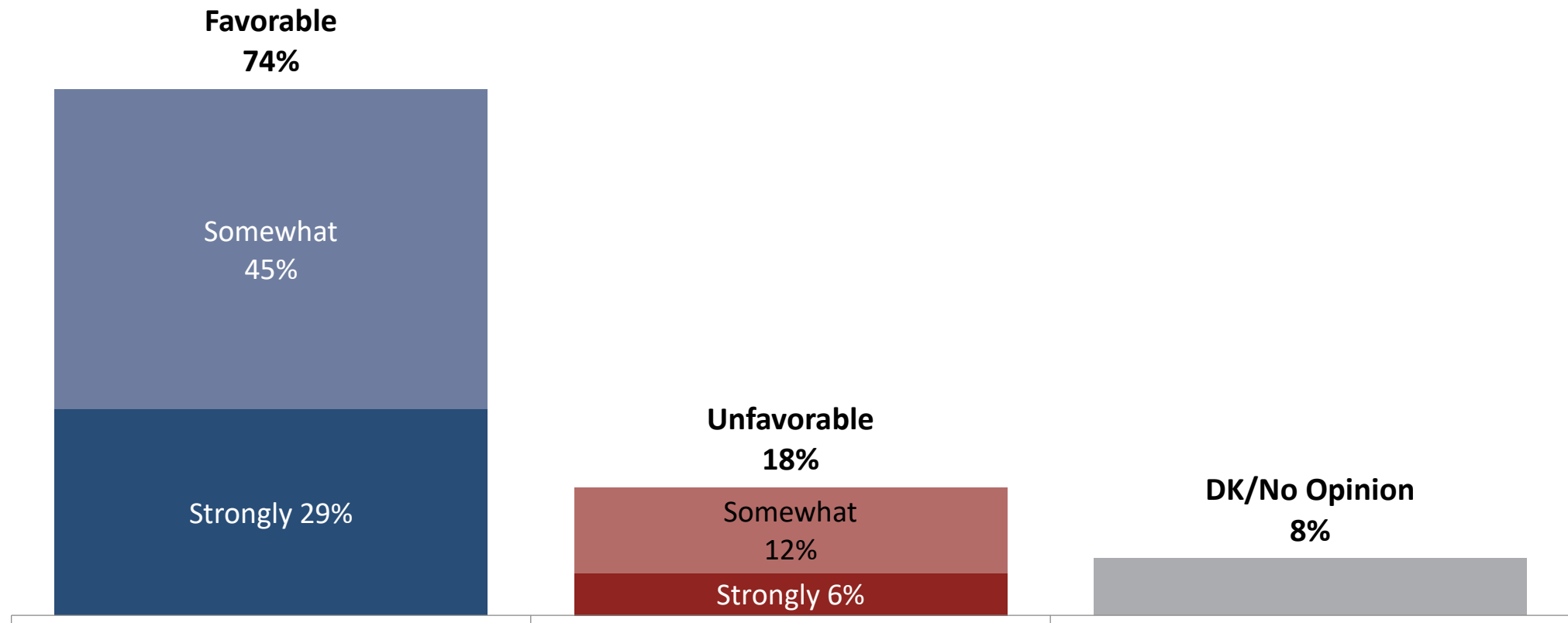
# Familiarity with Bike Share Funding by Demos

*Older residents are more likely to believe bike share programs are operated by private companies. Residents under thirty-five are far more likely to think they're funded by the City.*



# Bike Share Favorability Rating

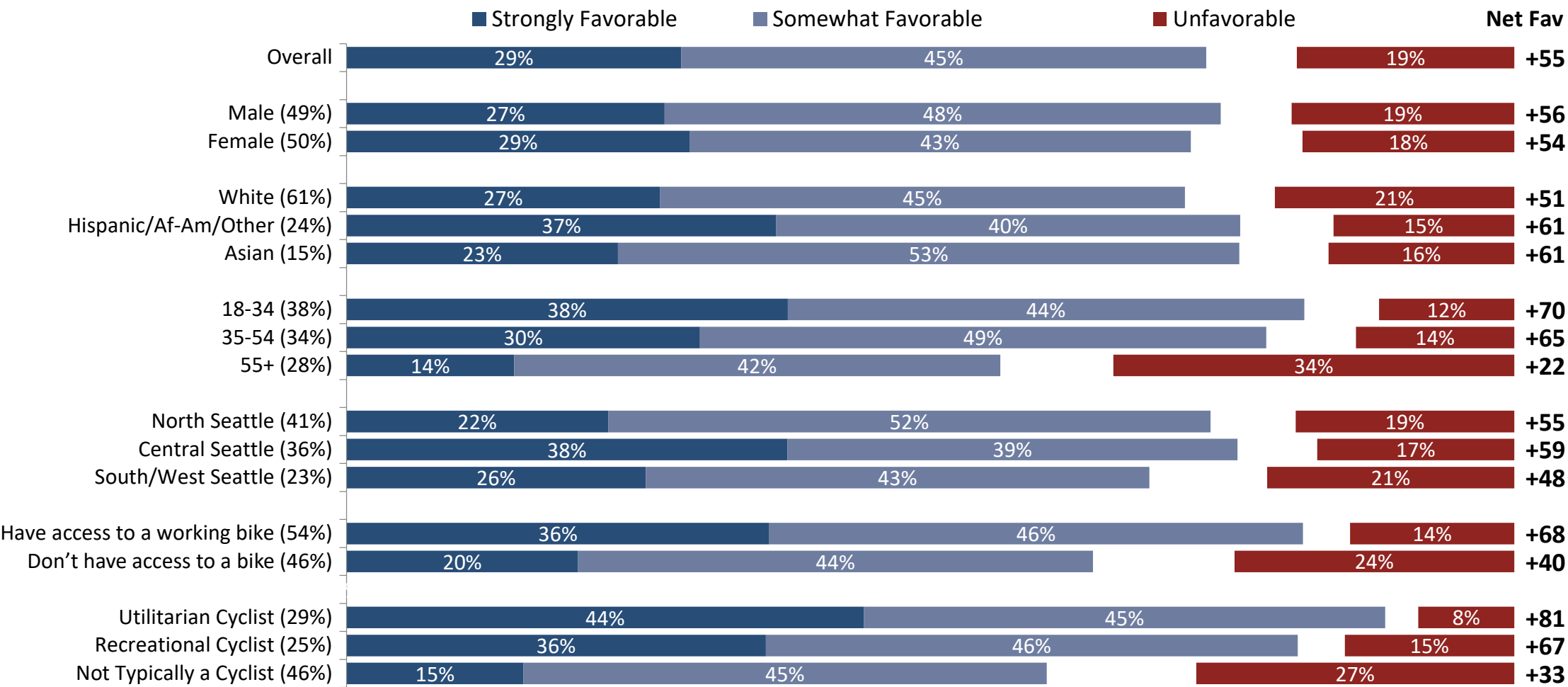
*The vast majority view Seattle's bike share programs favorably, with more viewing them strongly favorably than have an unfavorable impression.*



Q17. What is your opinion of the bike share programs currently operating in Seattle where riders can rent one of the green, yellow, or orange bikes you may have seen around town using a smartphone app?

# Bike Share Favorability by Demos

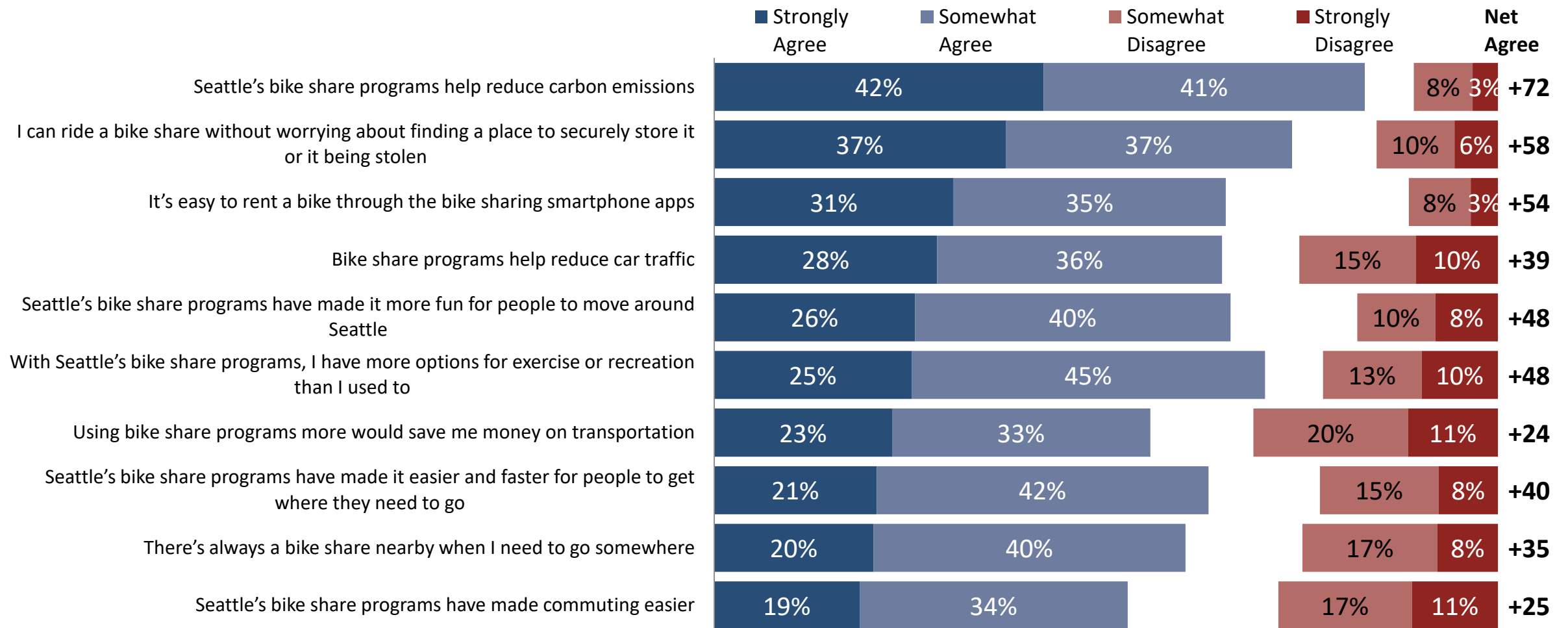
*While those who already bike have the most favorable views, even those in groups less likely to bike have overwhelmingly favorable views of Seattle’s bike share programs.*





# Positive Features

*Majorities agree with all tested positive bike share attributes, but reducing carbon emissions is the most widely-agreed upon benefit.*

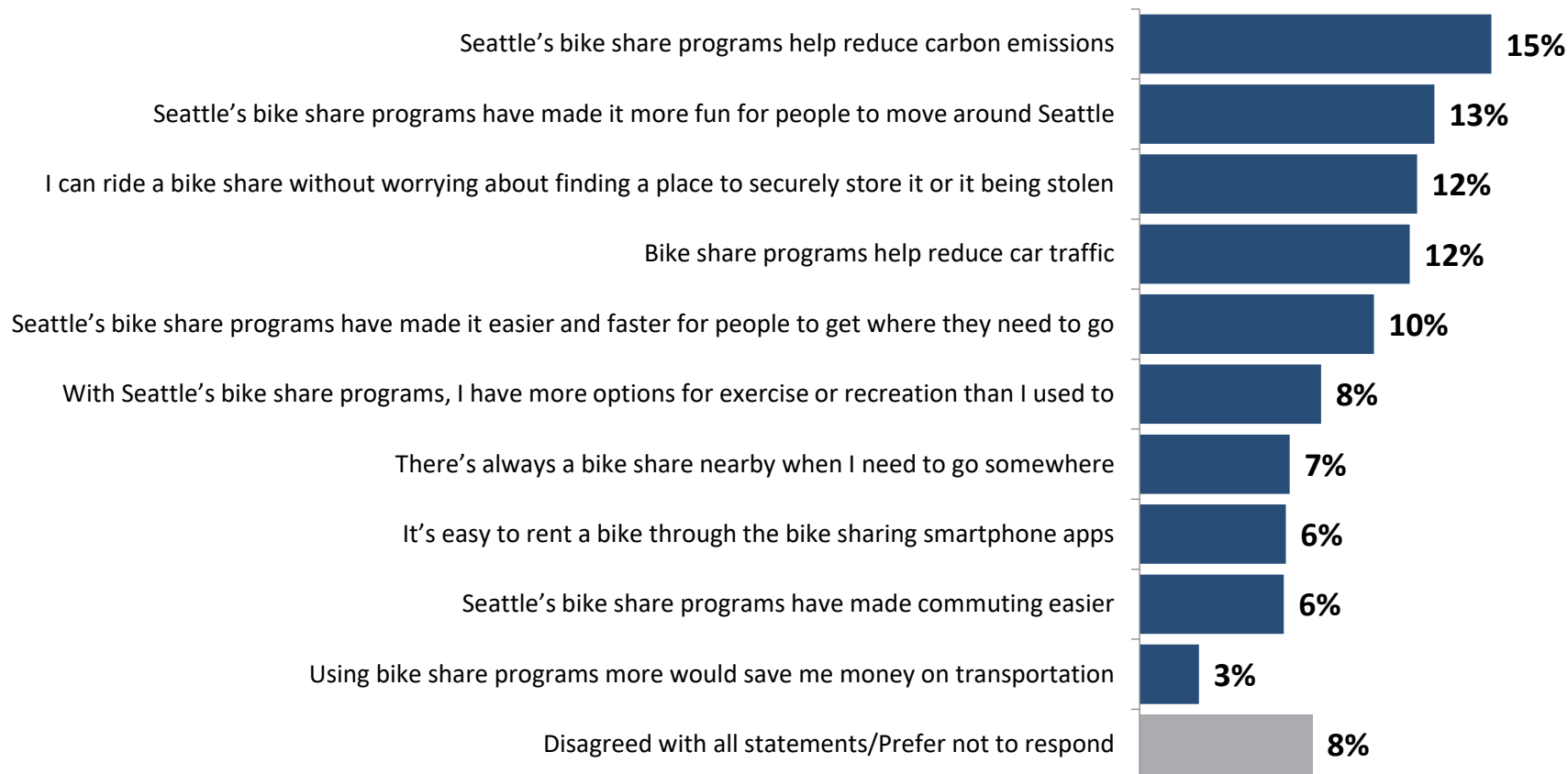


Q20-29. Regardless of how often you use these bike share programs personally, please indicate how strongly you agree or disagree with the following statements.

# Best Liked Positive Features

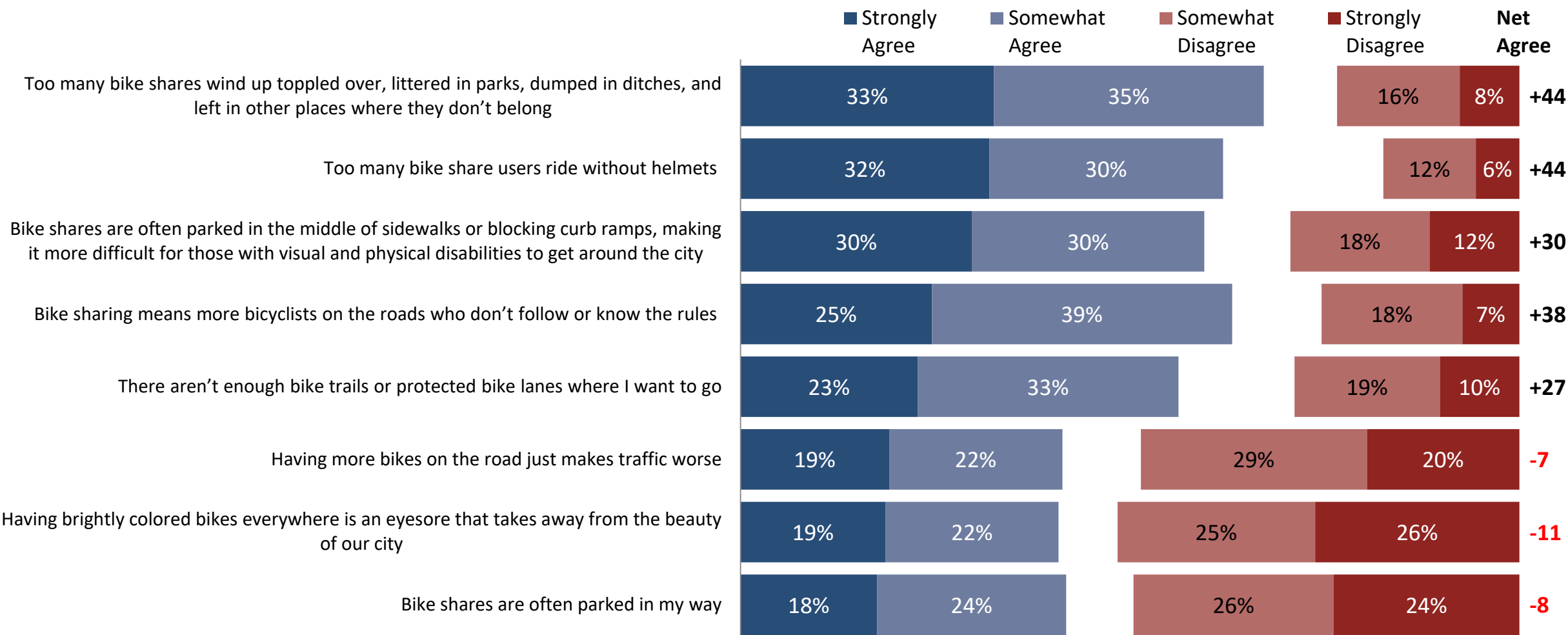
*When forced to choose the top benefit, reducing carbon emissions again comes in first, followed by making it more fun for people to get around Seattle.*

Looking at this list as a whole, which is the one feature that you like the **most**?



# Top Drawbacks

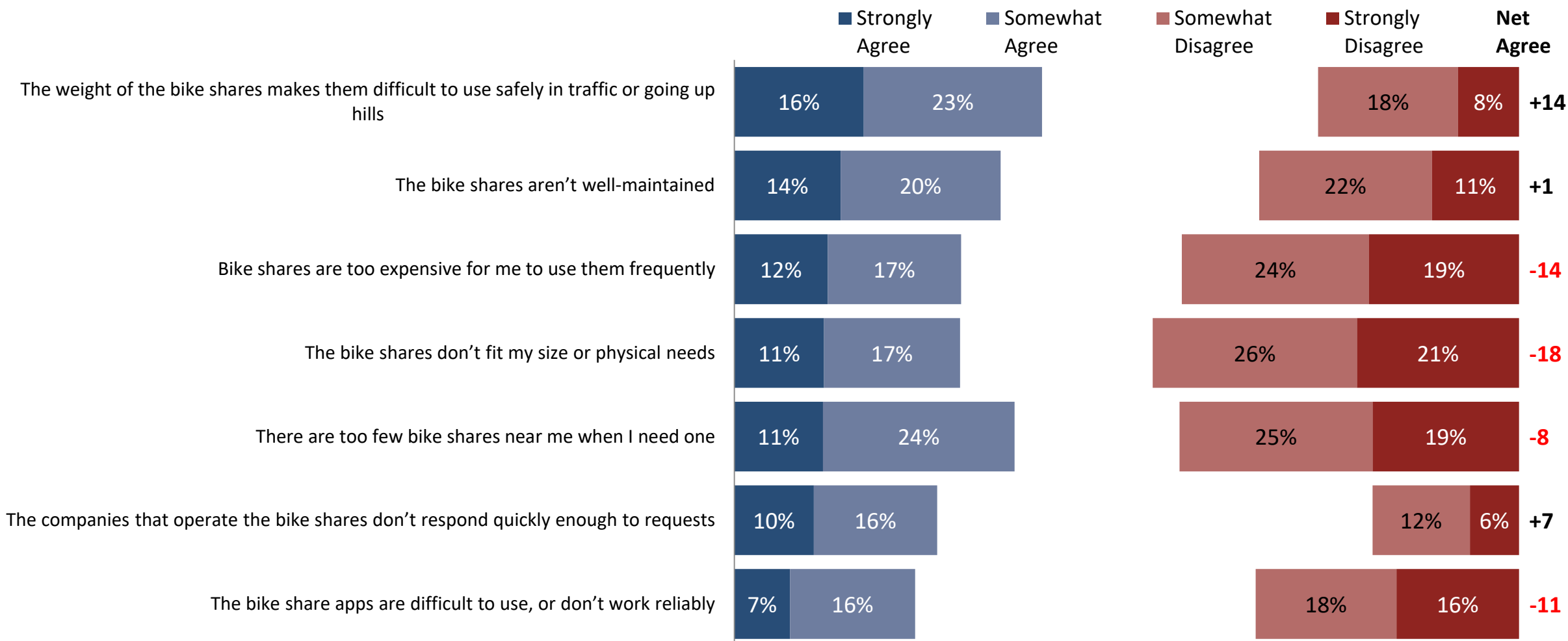
*While there is not a single clear drawback that stands out from the rest, there is a high level of agreement that too many bikes wind up scattered around the City, block access, and result in riders without helmets and who don't know the rules.*



Q31-45. Regardless of how often you use these bike share programs personally, please indicate how strongly you agree or disagree with the following statements.

# Top Drawbacks, Cont.

*Fewer agree that maintenance, app reliability, and customer service are problematic for them. Notably, over a quarter agree the bikes do not fit their size or physical needs.*

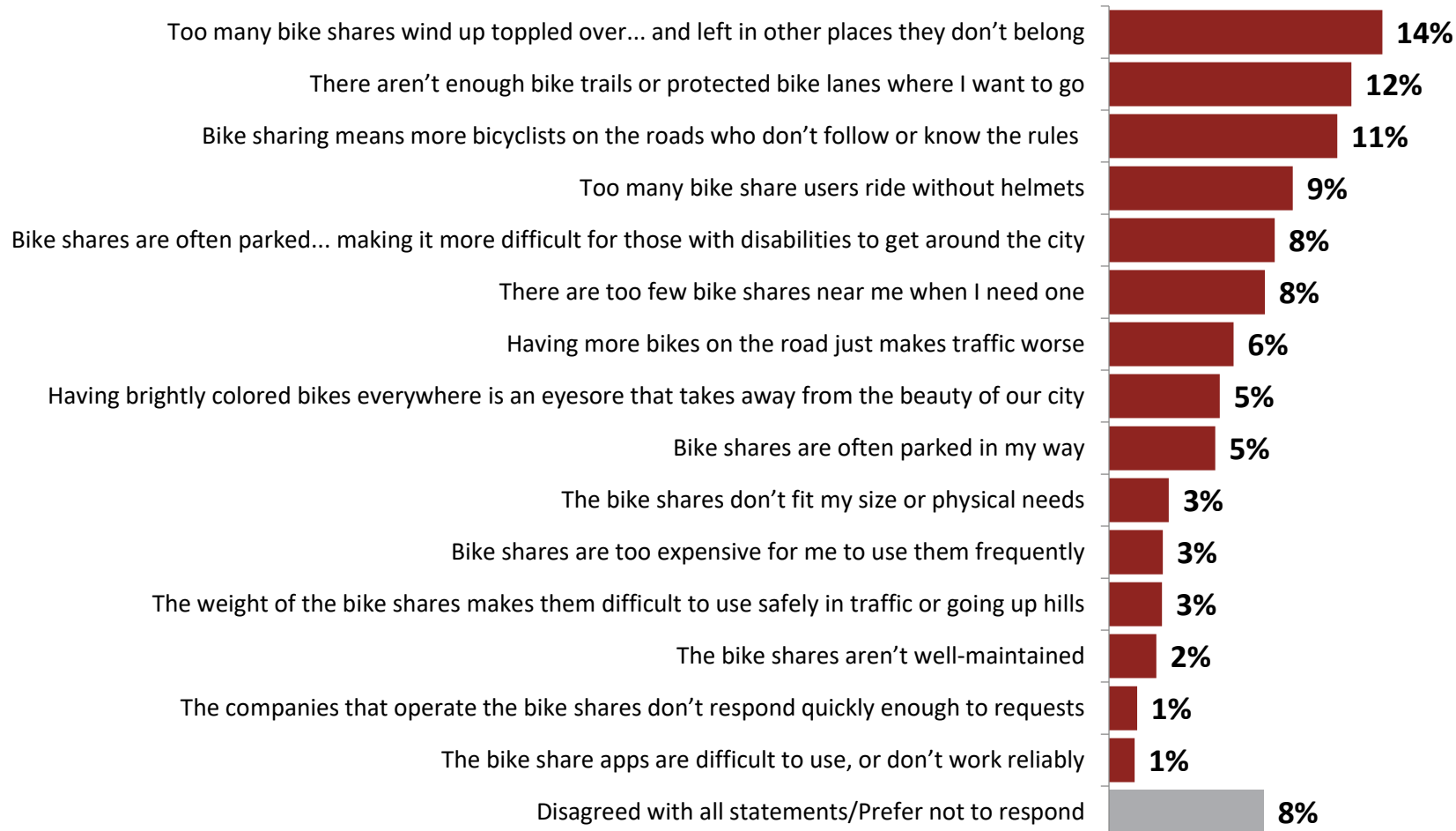


Q31-45. Regardless of how often you use these bike share programs personally, please indicate how strongly you agree or disagree with the following statements.

# Most Disliked Drawbacks

*No one single drawback stands out from the pack. Bikes winding up places where they don't belong rises to the top, but just edges out lack of protected bike lanes and trails.*

Looking at this list as a whole, which is the one drawback that you dislike the **most**?





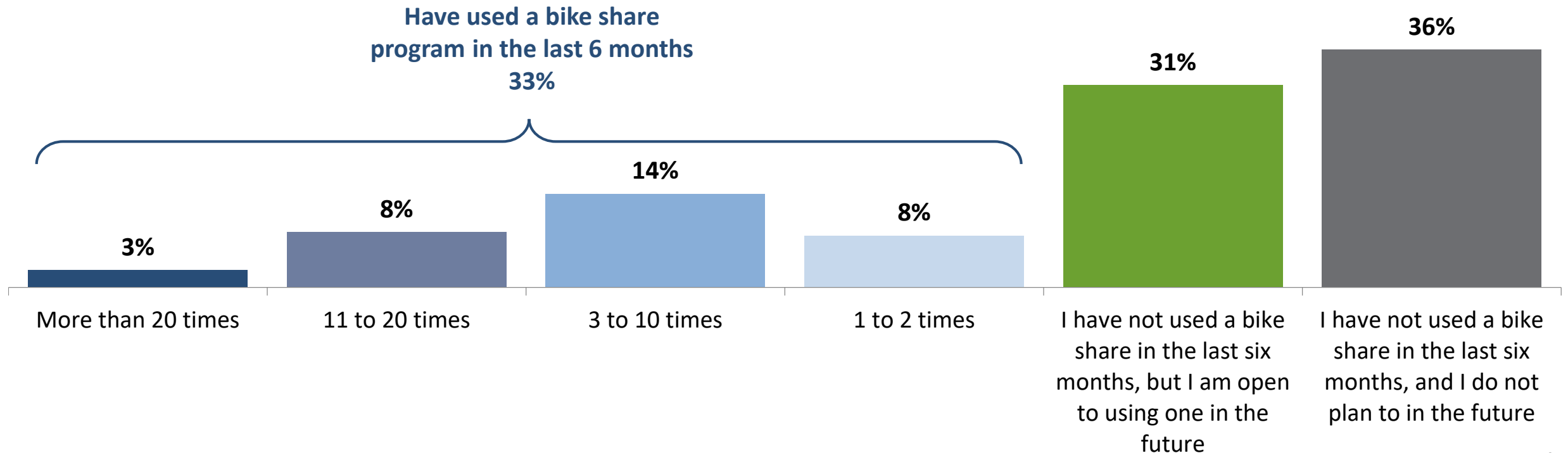


**Bike Share Use**

# Frequency of Bike Share Use in Last 6 Months

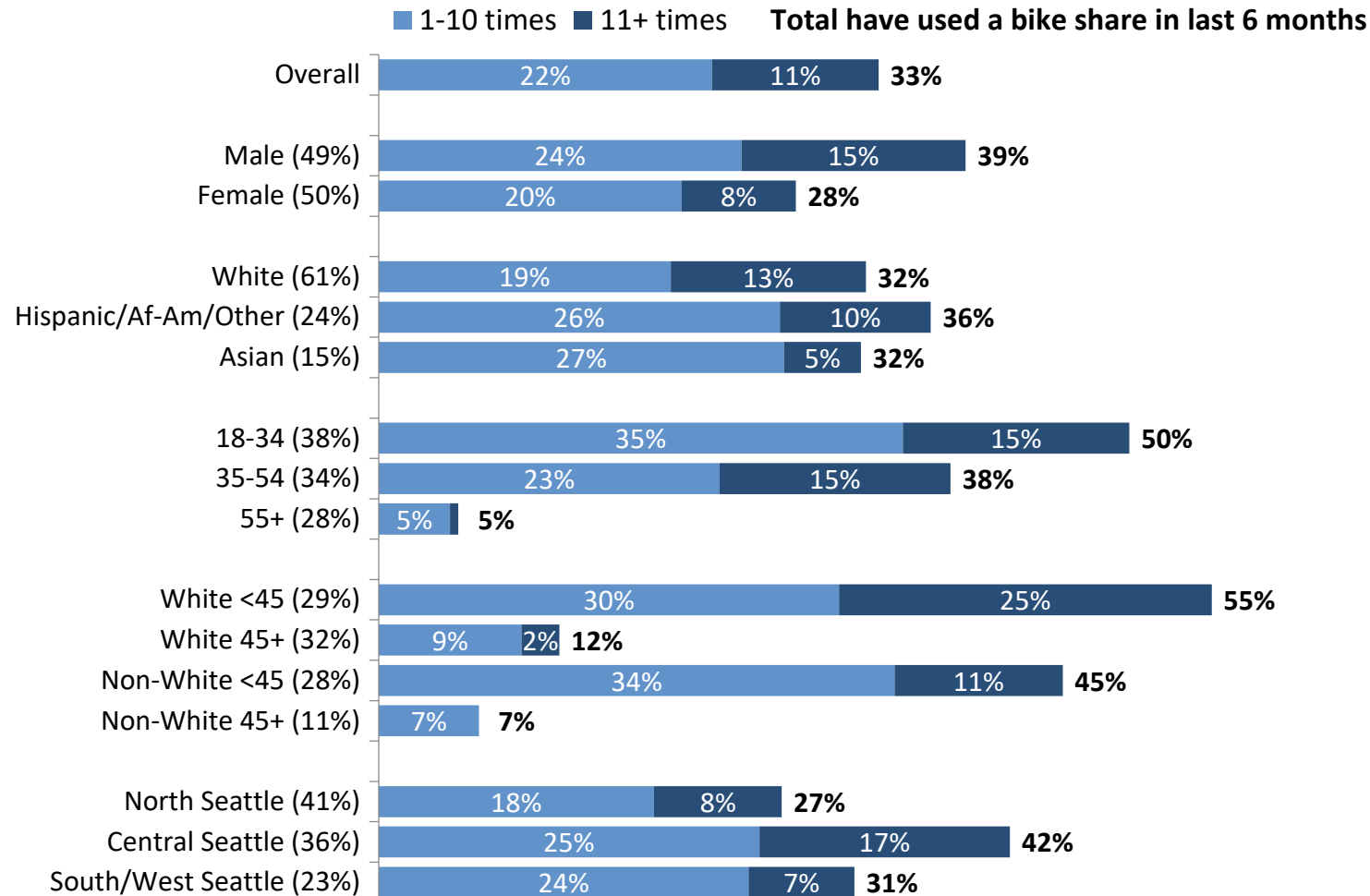
*A third have used one of Seattle's bike share programs at least once in the last six months. Another third have not used them yet but are open to doing so in the future.*

In the last six months, about how many times have you ridden one of the green, yellow, or orange bikes **that are part of one of the bike share programs** currently operating in Seattle?



# Frequency of Bike Share Use by Demos

*Half of those under thirty-five have tried bike sharing. Men are more likely to have tried bike sharing than women. Younger white residents are the most likely to have used bike sharing more than ten times.*

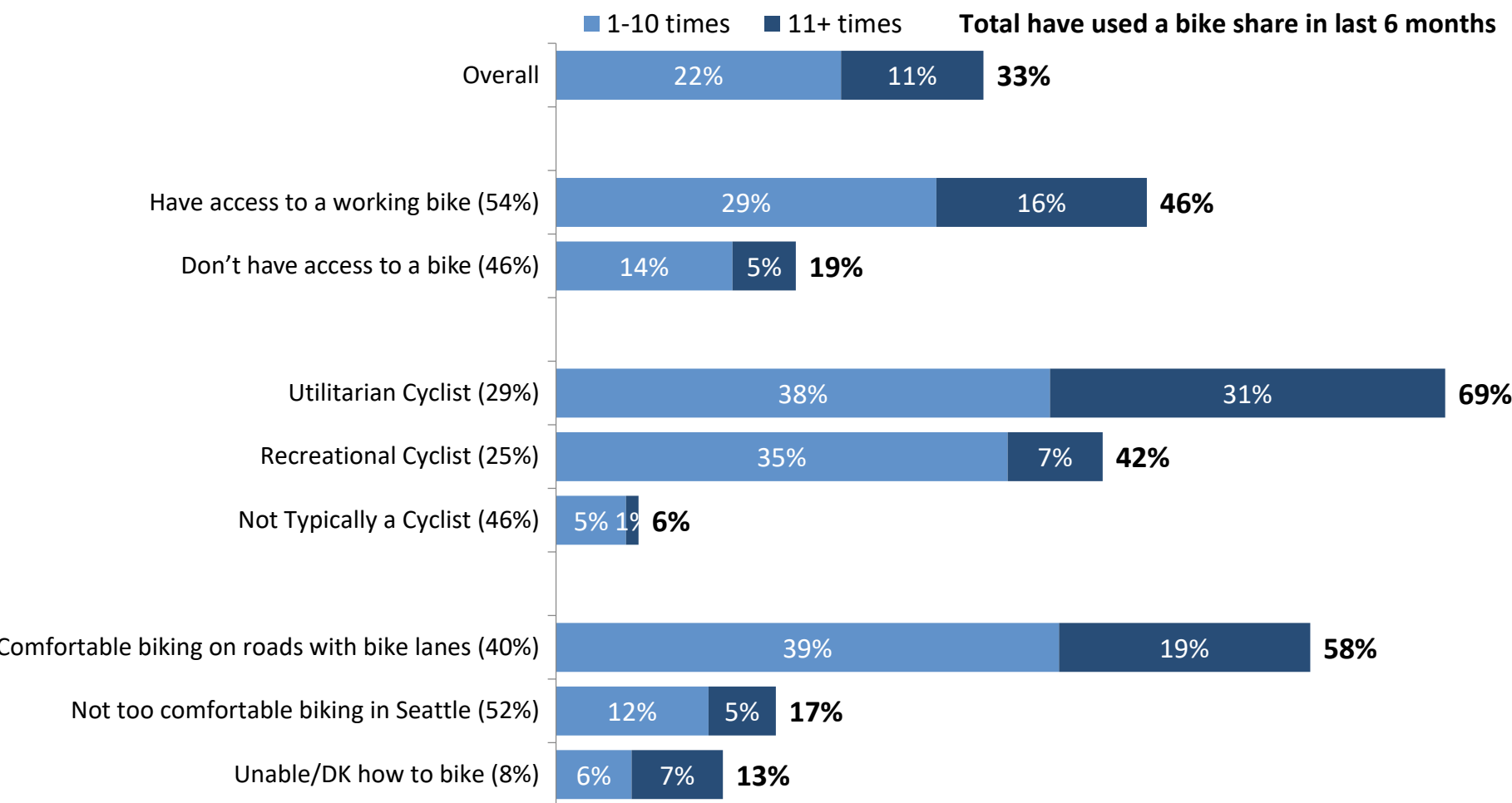


Q19. In the last six months, about how many times have you ridden one of the green, yellow, or orange bikes that are part of one of the bike share programs currently operating in Seattle?

# Frequency of Bike Share Use by Demos, Cont.



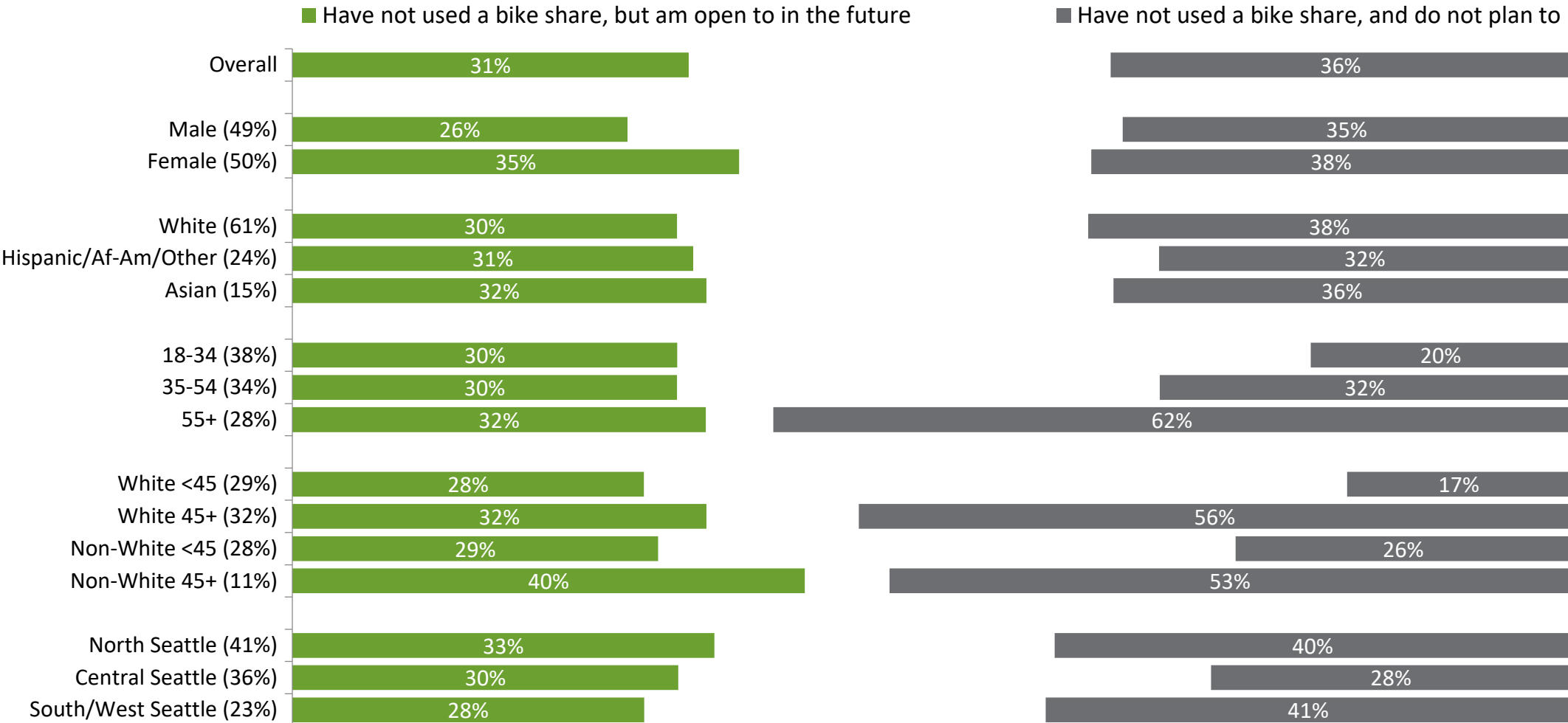
*Bike share use is more common among those who already bike in Seattle, especially those who bike for utilitarian purposes.*



Q19. In the last six months, about how many times have you ridden one of the green, yellow, or orange bikes that are part of one of the bike share programs currently operating in Seattle?

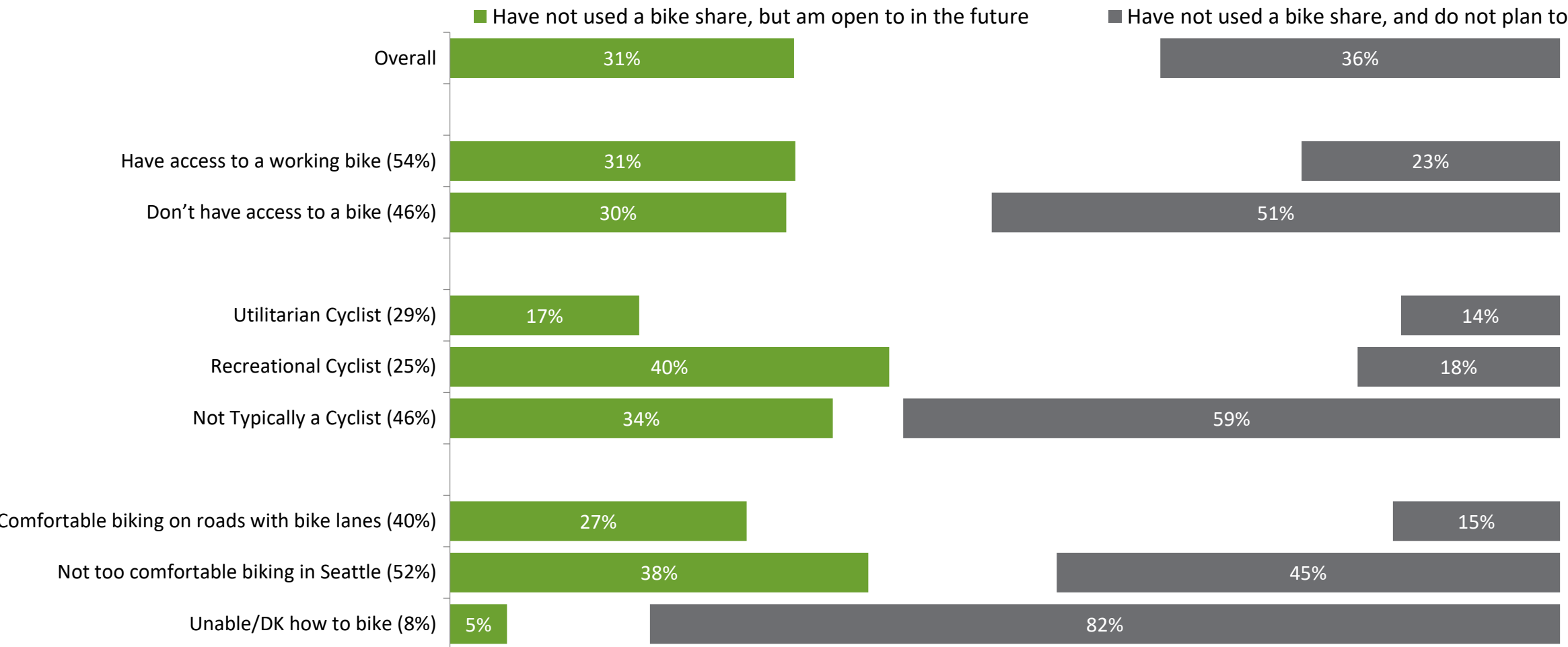
# Openness to Future Use by Demos

*Women and older, non-White Seattleites are the most open to using bike sharing in the future.*



# Openness to Future Use by Demos, Cont.

*Four-in-ten recreational cyclists are open to trying bike share in the future.*

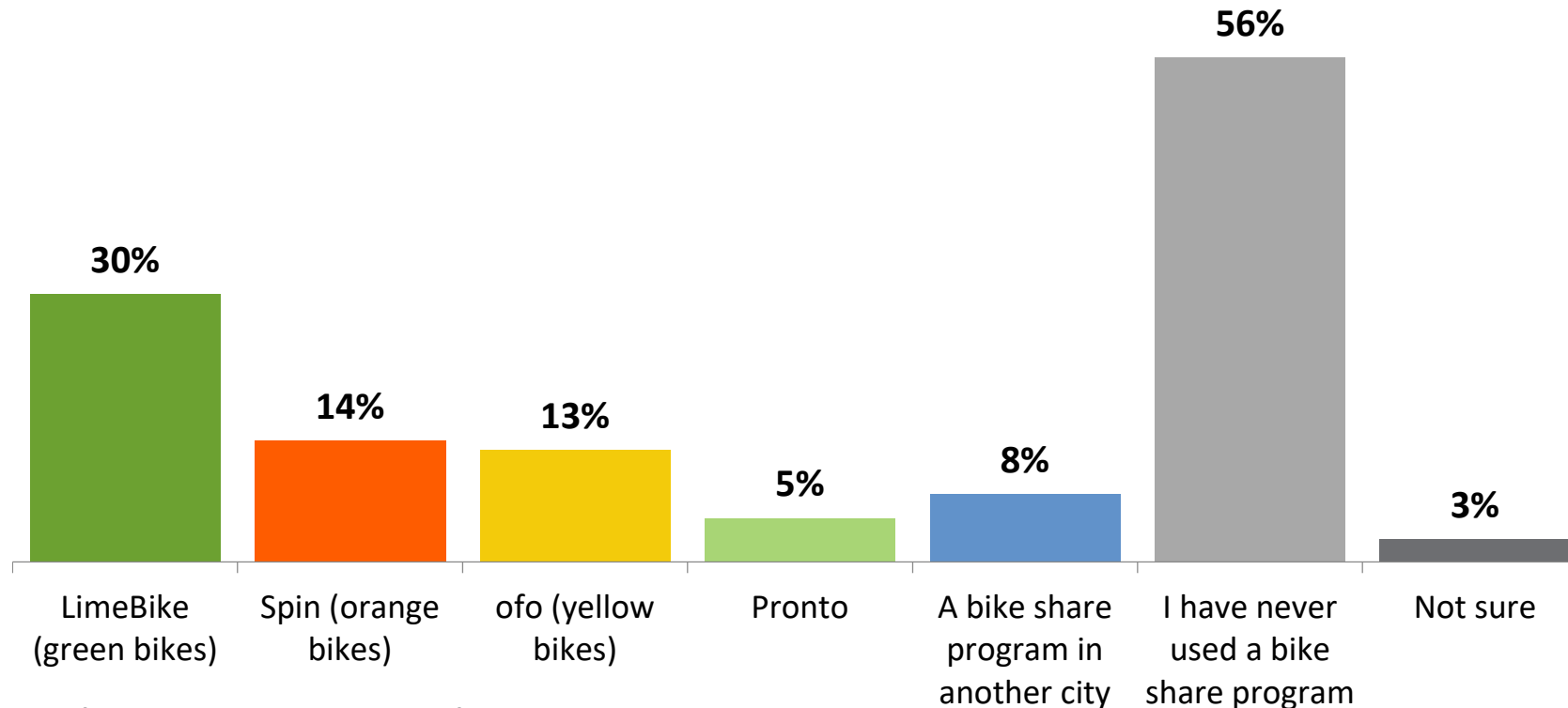


Q19. In the last six months, about how many times have you ridden one of the green, yellow, or orange bikes that are part of one of the bike share programs currently operating in Seattle?

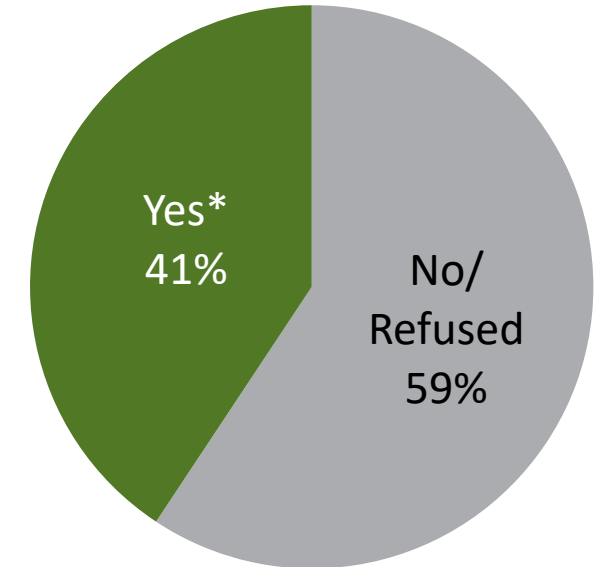
# Past Bike Share Usage by Company

*Nearly a third have used LimeBike, and just over forty percent have used a bike share program of some kind (including Pronto and programs in other cities)*

Which of the following bike share programs have you used before, if any?



Ever Used a Bike Share Program



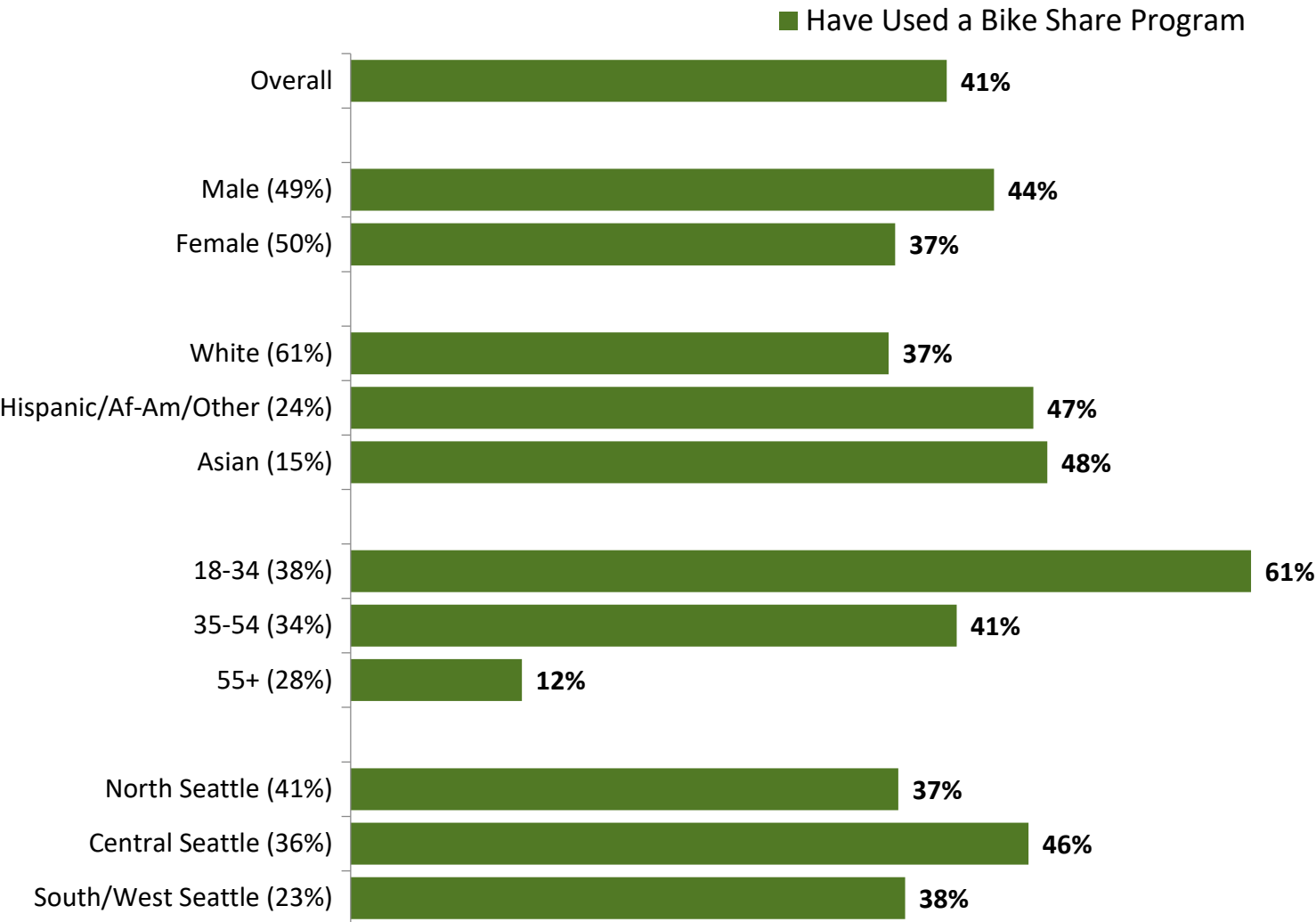
Q60. (Multiple Responses Accepted)

\*"Yes" reflects the percent of residents who indicate that they have used at least one bike share program.

Percentage is less than the sum of each individual responses because Q60 allowed for multiple responses.

# Past Bike Share Usage by Demos

*Younger Seattleites are more likely to have used a bike share program before.*

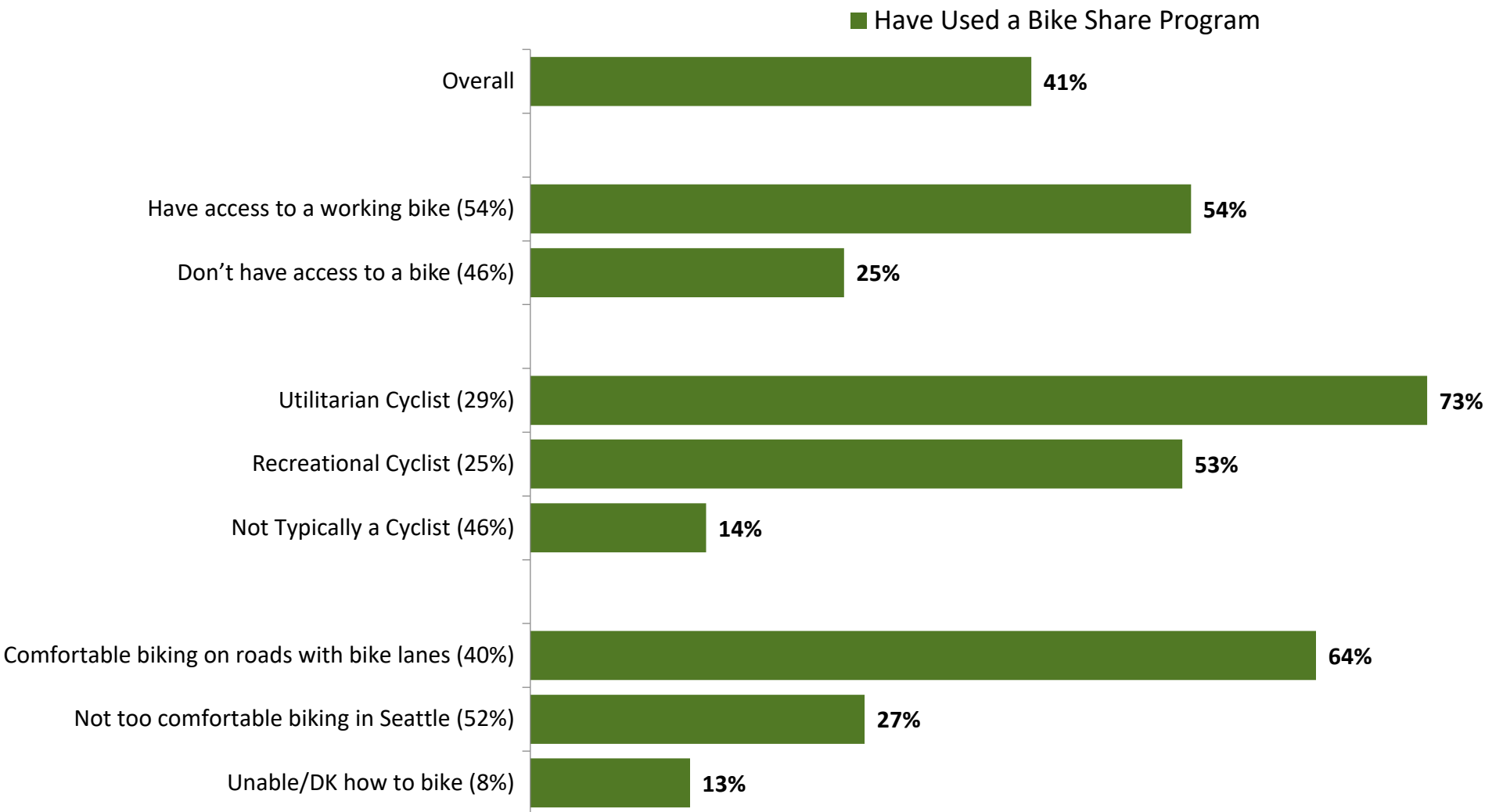


Q60. Which of the following bike share programs have you used before, if any? (Multiple Responses Accepted)



# Past Bike Share Usage by Demos, Cont.

*Three-quarters of utilitarian cyclists have tried a bike share program before*



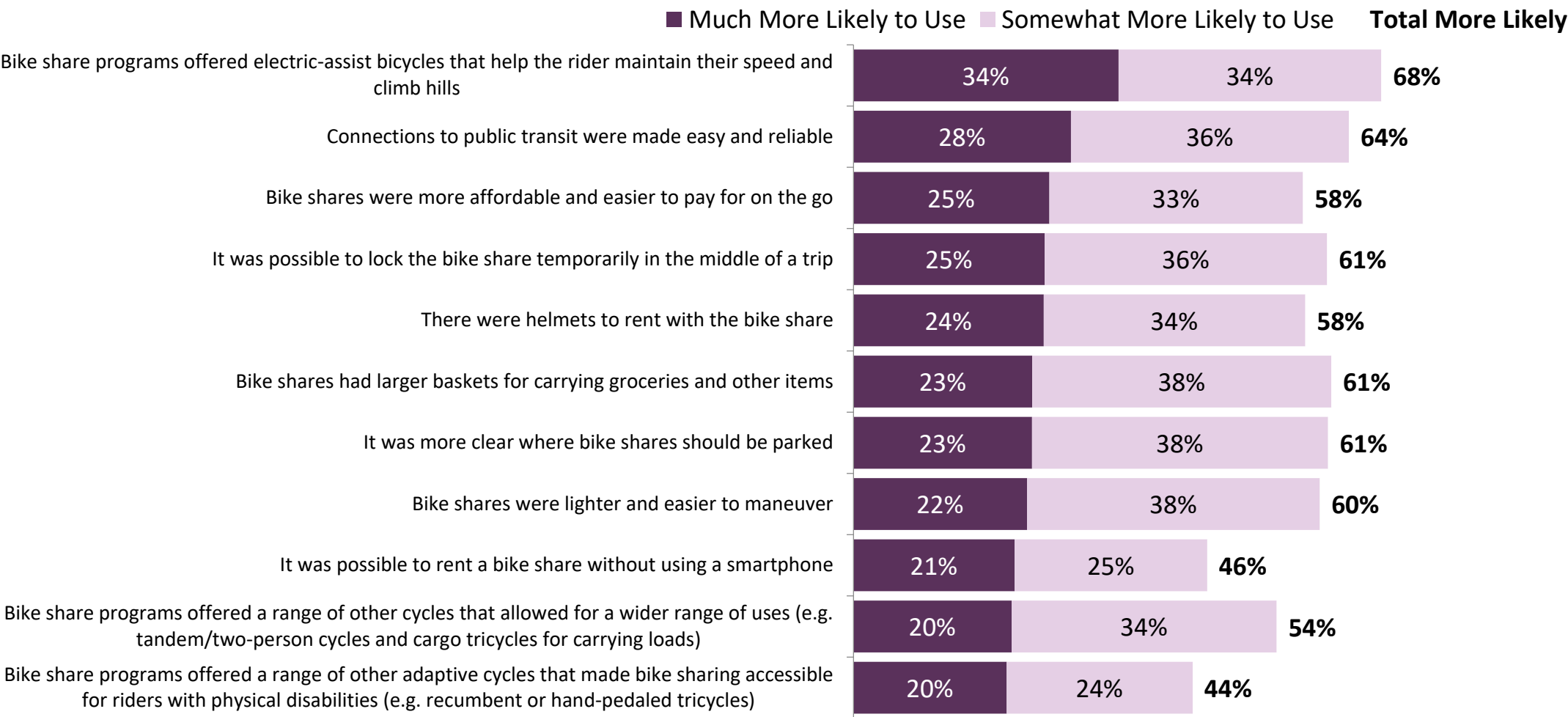
Q60. Which of the following bike share programs have you used before, if any? (Multiple Responses Accepted)



**Additional Features**

# Features That Could Expand Ridership

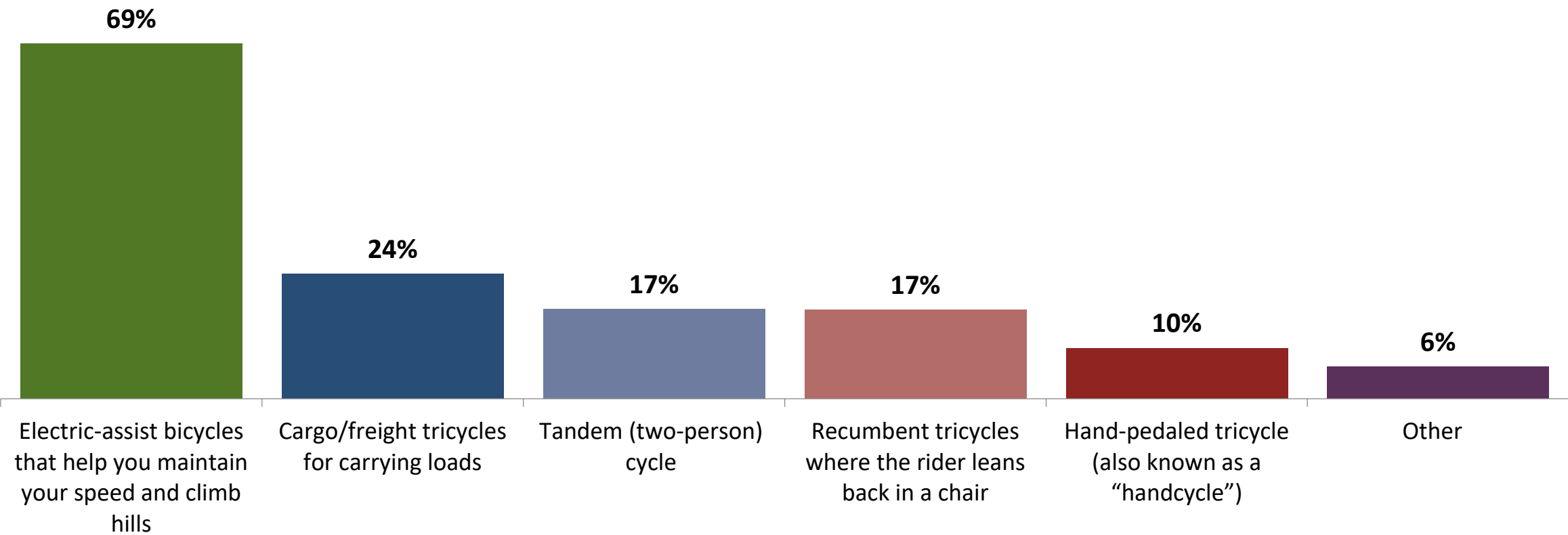
*Electric-assist bikes and reliable transit connections are the changes Seattleites are most likely to say would make them more likely to use bike sharing. Just under half express interest in adaptive cycles.*



Q47-57. Regardless of how often you use bike share programs currently, for each statement below, please indicate the impact it would have on your likelihood of using a bike share program.

# Alternative Bikes

*While electric-assist bikes generate the most interest, there is also significant interest in cargo tricycles, tandem cycles, and other alternatives.*



Q58. In addition to conventional two-wheeled bicycles, there are several other kinds of bikes out there. If some of these other models were added to Seattle’s bike share system, which ones would you be likely to use? (Multiple Responses Accepted)



**Ian Stewart**

**ian@emcresearch.com**

**206.204.8032**

**Sianna Ziegler**

**Sianna@emcresearch.com**

**206.204.80**

**Ben Richter**

**Ben@emcresearch.com**

**202.686.5903**