

Bicycling Perceptions and Experiences in Oregon and Southwest Washington

Presented to:
The Bicycle Transportation Alliance
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BICYCLING IN OREGON AND SW WASHINGTON

KEY FINDINGS:

- Eighty-nine percent of cyclists also own at least one automobile. (Page 6)
- Automobile ownership does not differ by cycling experience level, but usage drops significantly as cyclists become more comfortable riding. (Page 8)
 - Advanced cyclists use their automobile for roughly 25 percent of trips taken throughout the week, compared to 63 percent for noncyclists. (Page 8)
- As bicyclists become more comfortable, the number and percentage of weekly trips taken by bike increase significantly. (Page 9)
- There is a direct correlation between feelings of personal safety and the number and percentage of weekly trips that are taken by bike. (Page 10)
- Eugene riders take the highest percentage of their weekly trips by bicycle. (Page 11)
- North, Northeast and Southeast Portland travel more by bike than other Portland Metro areas. (Page 11)
- Commuting is the most common purpose of bicycle trips made by intermediate and advanced cyclists. (Page 12)

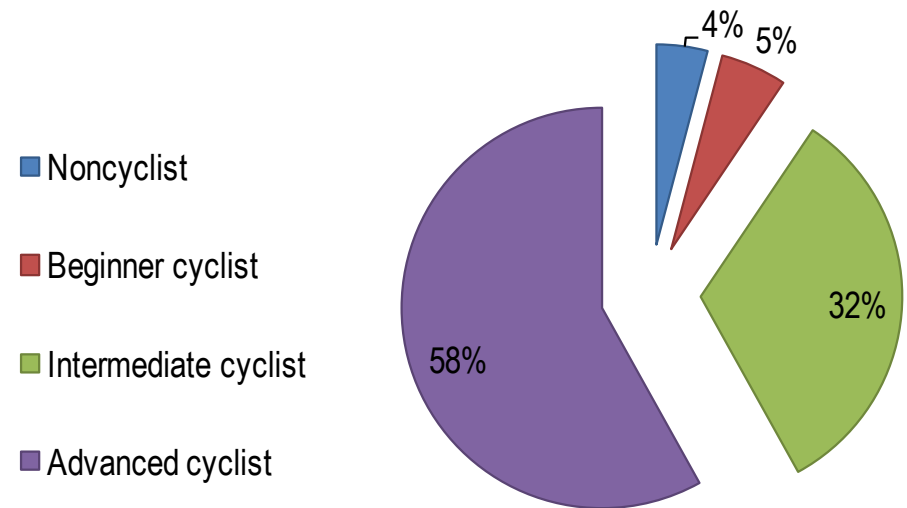
A BTA PERSPECTIVE

KEY FINDINGS:

- The BTA currently serves affluent intermediate and advanced cyclists, 35 years or older. (Page 15)
- Although former BTA members and those who aren't members rate the BTA slightly lower, overall the ratings of the BTA are reasonably strong. (Page 16)
- The BTA is currently viewed as a strong and effective advocate, but some would like the organization to be even more effective, inclusive and focused. (Page 17)
- Advocacy and safe bicycle routes dominate the reasons current BTA members joined the organization (Page 18)
- Pedestrian safety is not a “hot-button” issue for most of the BTA audience. (Page 18 & 21)
- The majority of members who leave the BTA do so for financial or “value” related reasons. (Page 19)

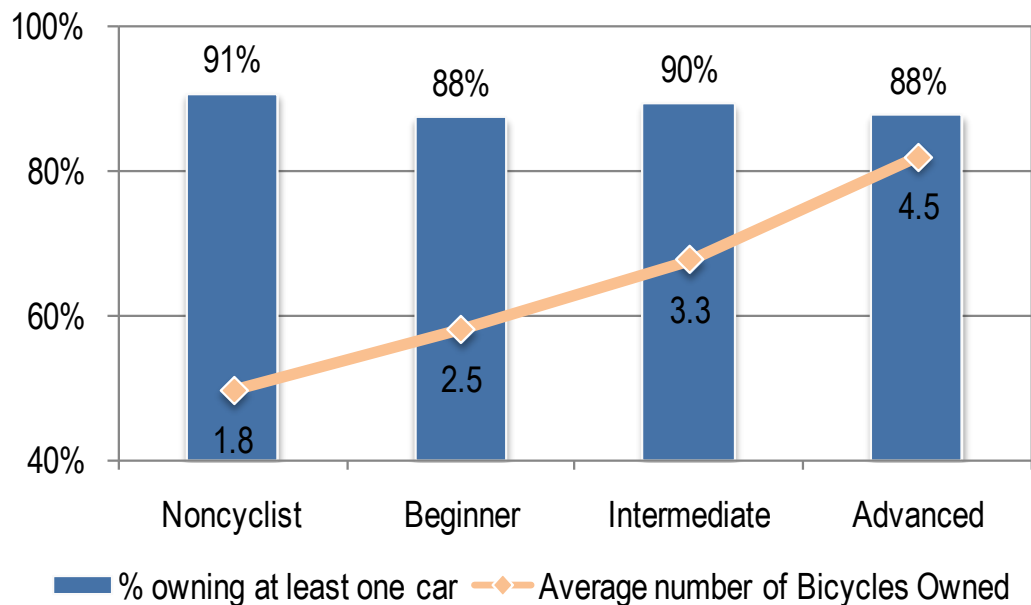
MORE THAN 2,000 PEOPLE TOOK PART IN THE SURVEY

- Fifty-eight percent rate themselves as an “experienced” or “advanced” cyclist.
- Nearly half (49 percent) are current BTA members.
- Thirty-seven percent are female and 60 percent are married.
- The majority (57 percent) are younger than 45, though 21 percent are 55+.
- Nearly 9 out of 10 (85 percent) have a 4-year college degree or higher.
- Many survey participants are affluent, with more than one-third reporting income above \$90,000.



NEARLY 9 OUT OF 10 CYCLISTS ALSO OWN AT LEAST ONE AUTOMOBILE

Automobile and bicycle ownership by cycling skill level



- The average number of bicycles owned increases as skill level improves.
- The skill level of the cyclist does not have a direct impact on whether someone owns an automobile, but
- Noncyclists are nearly twice as likely to own 3 or more cars than any other group (17 percent compared to 9 percent of cyclists)
- More than 14 percent of participants from Southeast, Northeast and North Portland report not owning a single automobile, significantly higher than other neighborhoods or regions.

AUTOMOBILE OWNERSHIP DIFFERS SIGNIFICANTLY BY REGION

- Survey participants from Eugene were most likely to report not owning an automobile at 20 percent.
- All of the people participating from the Bend/Sisters area reported owning at least one automobile.
- Within the Portland Metro area, residents of Southeast, Northeast and North Portland report the lowest car ownership.

The Region's Least Car-Centric Areas

	% Who Don't Own a Car	Avg Number of Cars Owned
Eugene	20%	1.2
Portland Metro	13%	1.4
Other areas in OR and Southwest WA	3%	2.0
Bend/Sisters	0%	1.9

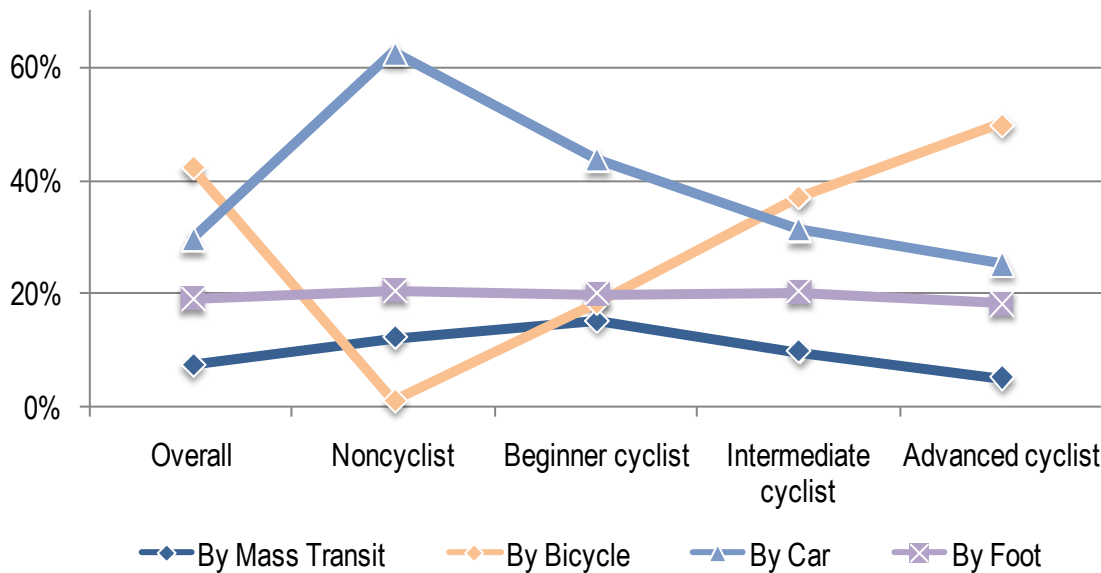
Portland Metro's Least Car-Centric Neighborhoods

	% Who Don't Own a Car	Avg Number of Cars Owned
Southeast Portland	15%	1.3
Northeast Portland	15%	1.3
North Portland	14%	1.2
Northwest Portland	12%	1.4
Vancouver	10%	1.9
Beaverton/Hillsboro	9%	1.7
Southwest Portland	7%	1.6



AS BICYCLING INCREASES, CAR AND MASS TRANSIT USAGE DECLINE

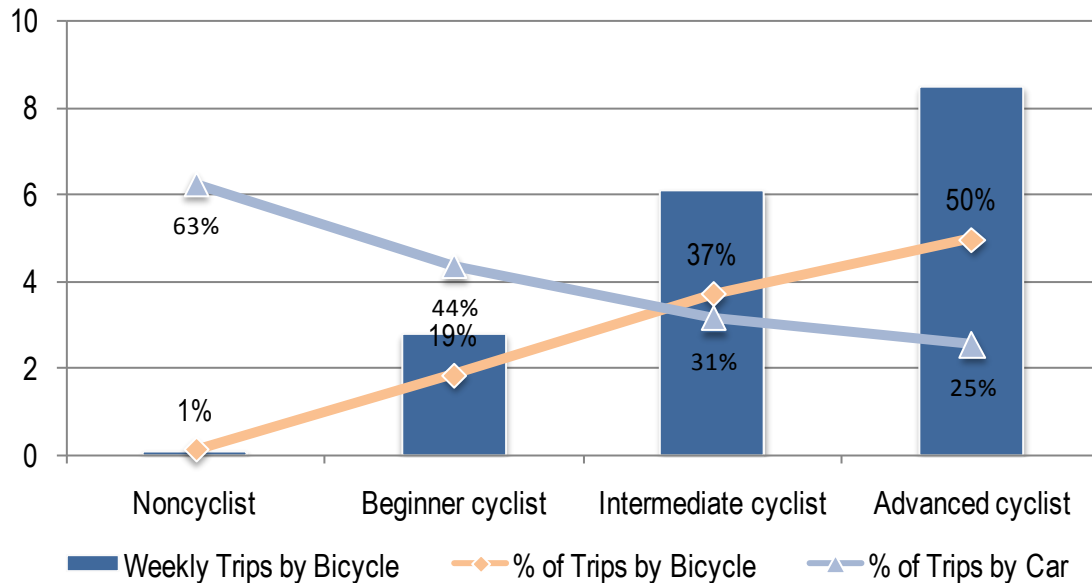
Percentage of Weekly Trips Taken By....



- Noncyclists rely on travel by automobile for nearly two-thirds of their weekly trips.
- Advanced cyclists take roughly half of their trips by bike.
- The percentage of trips taken on mass transit drops as the level of cyclist increases.
- Roughly 20 percent of trips are taken by foot each week – regardless of propensity to ride a bicycle.

ADVANCED CYCLISTS TAKE 3 TIMES AS MANY TRIPS BY BICYCLE AS BEGINNERS

Weekly Trips Taken by Bicycle and Car



- As cycling experience levels increase, so do the number and percentage of trips that occur by bicycle.
 - Advanced cyclists take 9 trips per week by bike, on average, compared to only 3 trips by beginners.
- Automobile usage decreases significantly as the experience level of the cyclist increases.
 - Experienced cyclists use their cars roughly half as often as noncyclists (4.2 trips per week, compared to 8, on average).
- Use of mass transit and walking do not change significantly based on experience level of the cyclist.

EUGENE LEADS IN PERCENTAGE OF WEEKLY TRIPS TAKEN BY BICYCLE

- More than half of all weekly trips by study participants from Eugene were by bike, higher than any other area.
- North and Southeast Portland have the highest percentage of weekly trips that occur by bicycle (47 percent).
- Southwest Portland has the lowest percentage of weekly trips conducted by bicycle, followed by the Beaverton/Hillsboro area.

The Region's Most Bike-Centric Areas

	% of Trips that are by Bicycle	Avg Weekly Trips by Bicycle
Eugene	55%	8.3
Bend/Sisters	46%	6.9
Portland Metro	43%	7.4
Other areas	37%	5.6

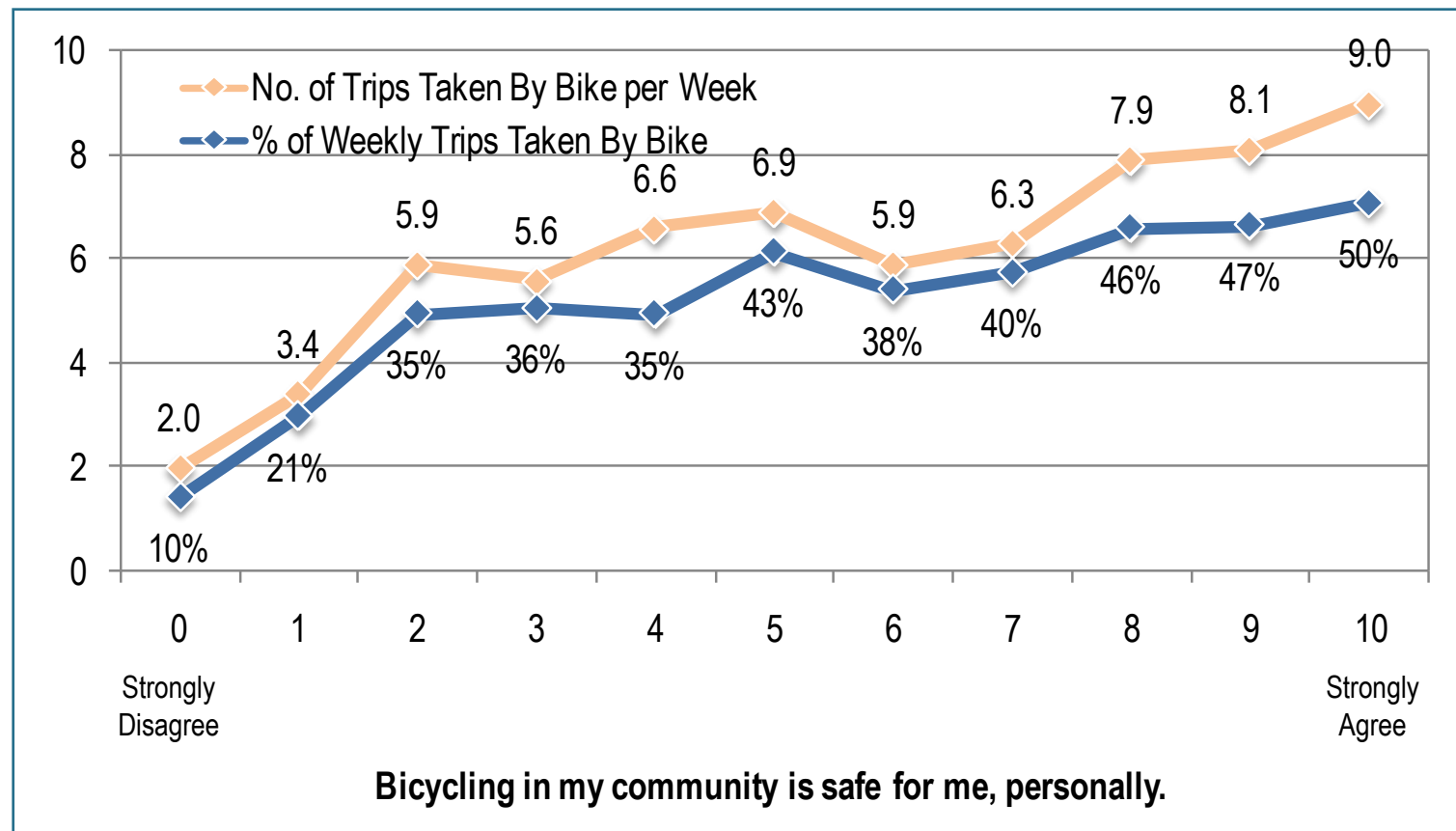
Portland Metro's Most Bike-Centric Neighborhoods

	% of Trips that are by Bicycle	Avg Weekly Trips by Bicycle
North Portland	47%	8.2
Southeast Portland	47%	8.0
Northeast Portland	45%	8.3
Vancouver	42%	6.7
Northwest Portland	37%	6.6
Beaverton/Hillsboro	35%	5.1
Southwest Portland	32%	4.7

PERCEIVED SAFETY DIRECTLY IMPACTS PERCENTAGE OF TRIPS TAKEN BY BIKE

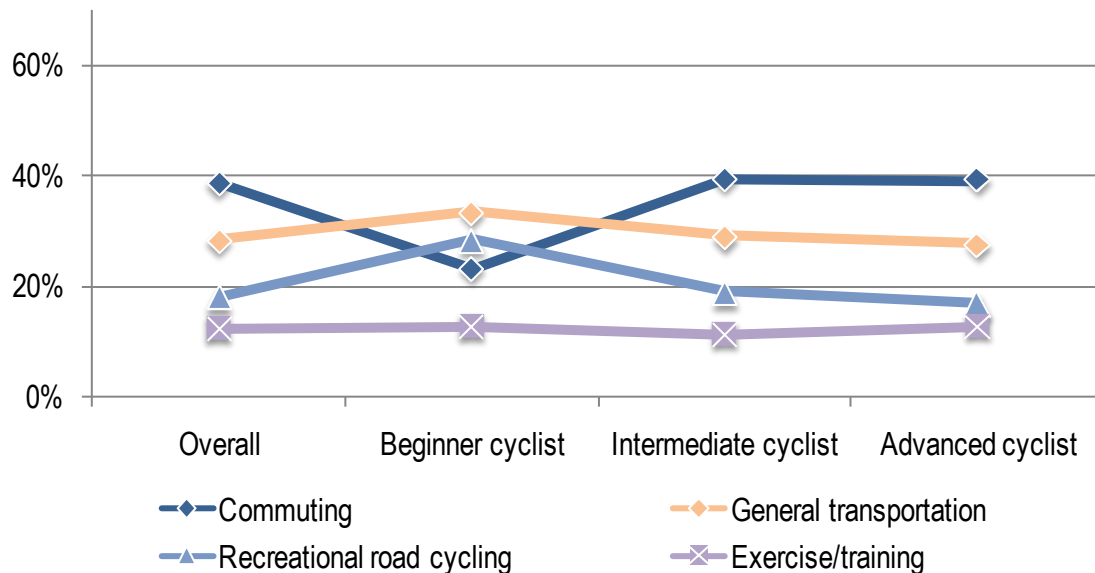
- Those who rate bicycling safety in their community a 10 (out of 10) ride their bike more than twice as often in an average week compared to those who rate safety a 0 or 1.

The Impact Perceived Safety has on Bicycle Ridership



BIKE COMMUTING IS THE MOST COMMON TYPE OF BICYCLE TRIP TAKEN

Purpose of Weekly Bicycling Trips

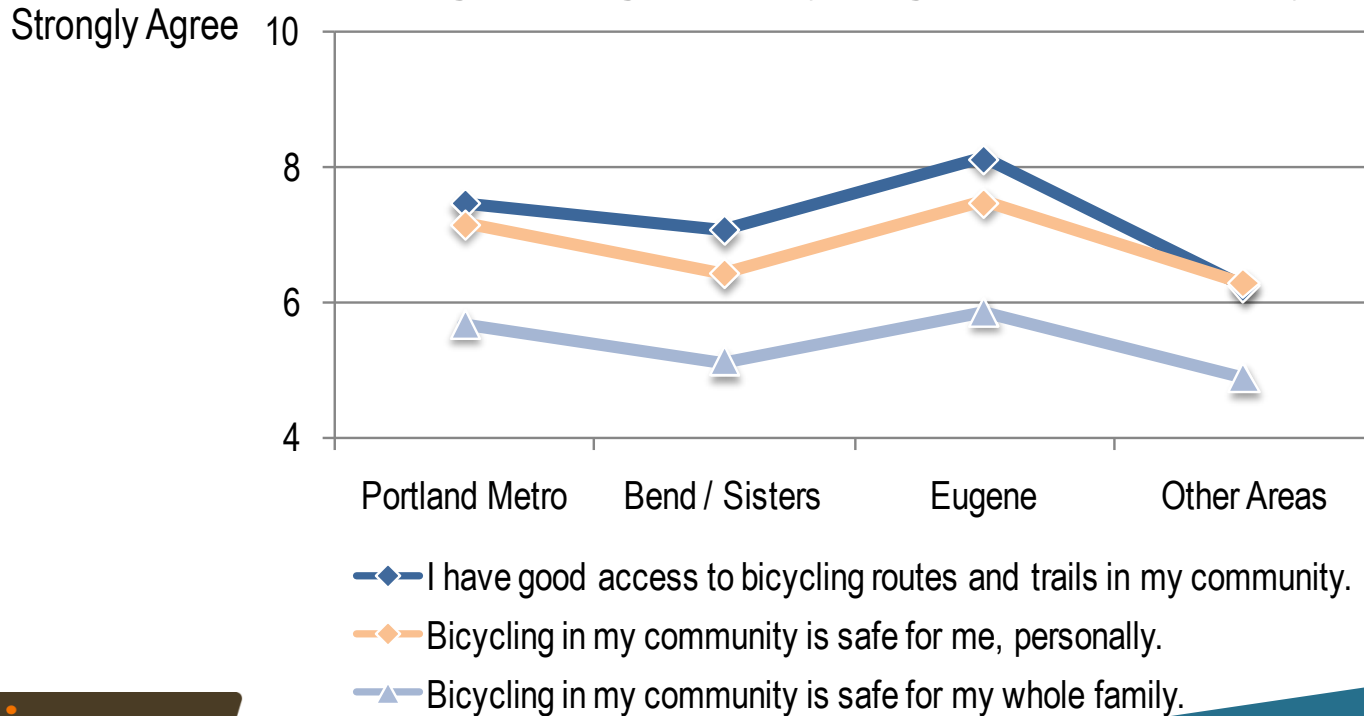


- Nearly 40 percent of all bicycling trips are for commuting purposes.
- Beginning cyclists bike commute roughly half as often as more advanced cyclists.
- Those who rate themselves as intermediate or advanced, use their bicycles in very similar fashion.
- A higher percentage of beginning cyclists rides are for recreational purposes.

EUGENE RATES THEIR ACCESS TO ROUTES AND SAFETY HIGHEST IN AREA

- Eugene residents rate their access to routes and overall safety higher than other regions included in the study.
- Access to routes is rated consistently higher than overall safety.

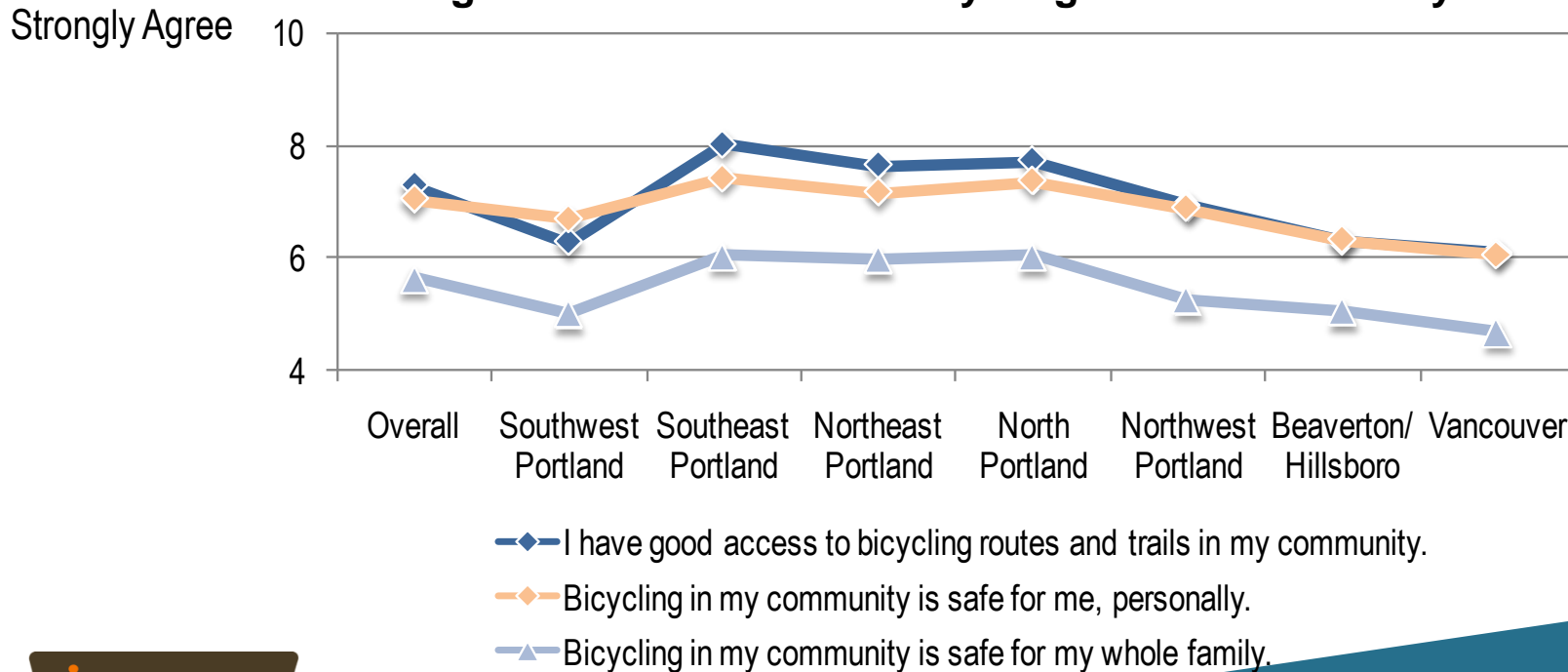
Rating the Regions Bicycling Routes and Safety



ACCESS TO ROUTES AND SAFETY RATED HIGHEST IN EAST AND NORTH PORTLAND

- Residents of Southeast, Northeast and North Portland rate access to bicycling routes and safety higher than in other neighborhoods.
- Family bicycling safety is rated significantly lower than personal safety in each neighborhood included in the study.

Rating Portland Metro Area Bicycling Routes and Safety



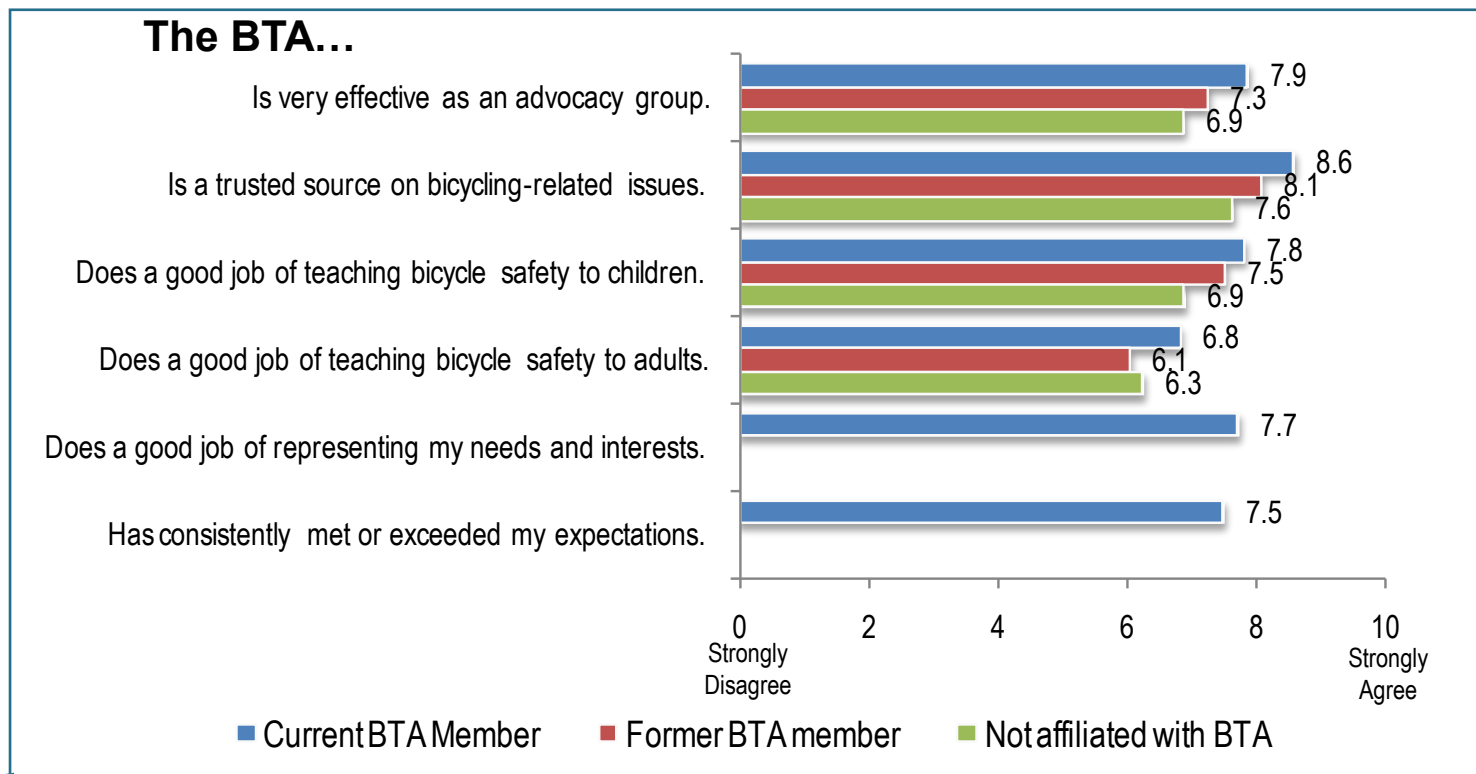
A PROFILE OF BTA MEMBERS

- Current and former BTA members rate their skill levels higher than nonmembers.
- Females responding to the survey were more likely to be former members.
- BTA Members are significantly older and more likely to have incomes greater than \$50,000.

% Who....	BTA Membership		
	Current	Former	Nonmembers
Rate Their Skill as Intermediate or Advanced	96%	92%	83%
Are Considering Joining the BTA	N/A	N/A	53%
Are Female	36%	42%	36%
Are Less than 35 Years Old	16%	22%	43%
Have a 4-Year College Degree or Higher	89%	83%	80%
Are Married	65%	56%	56%
Have Children in Household	21%	22%	27%
Have a Household Income Above \$50,000	81%	73%	66%
% Of....			
Weekly Trips Taken by Bicycle	45%	43%	39%
Bicycle Trips Taken While Commuting	40%	36%	38%

PERCEPTIONS OF THE BTA ARE LOWER FOR NONMEMBERS IN ALL AREAS

- Nonmembers rate the BTA significantly lower in each of the areas listed, compared to current members.
- The BTA is much higher rated for advocacy than for its education of children and adults.
- The minor drop in rating from current to former members indicates limited loss of membership due to satisfaction-related issues.



PEOPLE VIEW BTA AS AN EFFECTIVE AND EDUCATIONAL BICYCLE ADVOCATE

- Advocacy is the most common word used to describe both the current BTA, as well as the ideal version of the organization.
- Although “effective” was used by a large percentage to describe the BTA, almost twice as many listed it as their ideal version of the organization.
- A much higher percentage of people described their ideal BTA as “inclusive” and “focused” compared to those who described the current BTA with those terms.



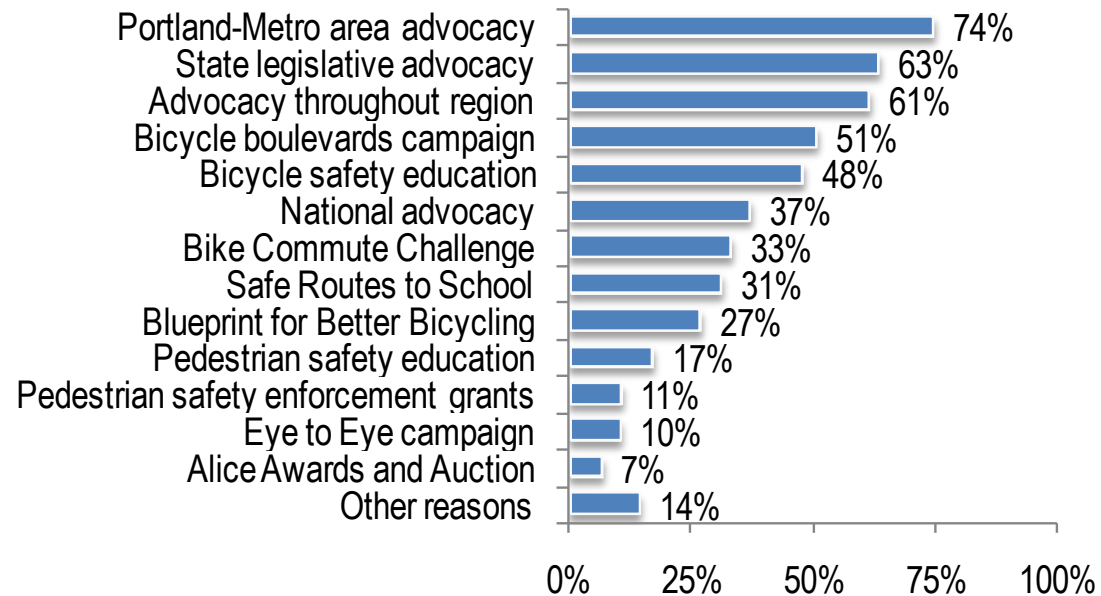
Strongly
Disagree

Strongly
Agree

ADVOCACY DRIVES BTA MEMBERSHIP FOR MAJORITY OF CURRENT MEMBERS

- Local and regional advocacy are the most common reasons current members joined BTA
- Roughly half of current members joined because of interest in the Bicycle Boulevards campaign, or bicycle safety education.
- Pedestrian safety issues are important to a much smaller percentage of BTA members than other campaigns.
- The Bike Commute Challenge (ran annually) is a good campaign to create interest in the BTA among nonmembers.

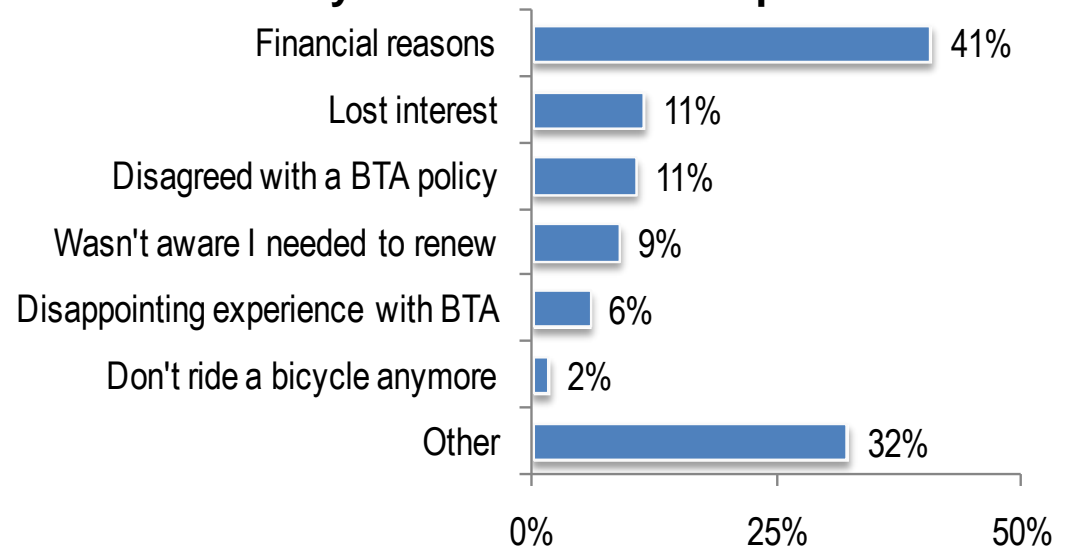
I joined the BTA because I am interested in:



FINANCIAL CONCERNS ARE PRIMARY REASON PEOPLE DROP MEMBERSHIP

- Financial reasons was mentioned nearly four times as often as any other reason for people dropping their BTA membership
- Nearly 1 in 10 reported that they weren't aware they needed to renew.
- Very few (2 percent) indicate they no longer ride their bicycle.
- The "Other" category contains a variety of reasons, such as:
 - Moved out of area
 - Fail to see the ongoing benefit
 - Feel it is only focused on Portland area
 - Procrastinated and plan on renewing

Why did you decide not to renew your BTA membership?

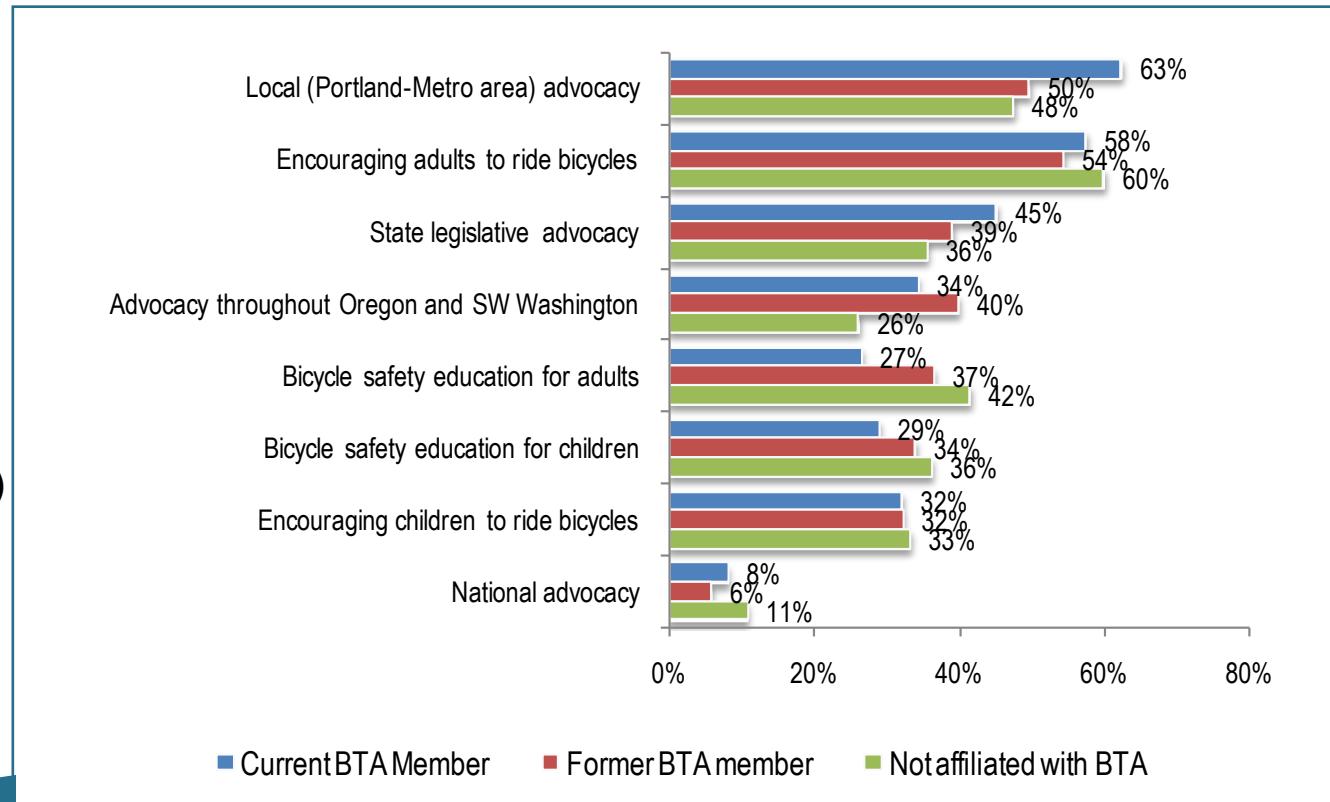


ADVOCACY AND ENCOURAGING ADULT RIDERS ARE TOP MEMBER PRIORITIES

- Members clearly want BTA to focus on local and regional advocacy and encouraging adults to ride bicycles.
- Bicycle safety education is more of a priority for former BTA members and nonmembers.
- Advocacy throughout Oregon and SW Washington is significantly more important to former BTA members.

Please rank the following items in terms of the priority you would like the BTA to give them.

(% Ranking Item in Top 3)



LOCAL AND STATE-LEVEL ADVOCACY ARE MOST IMPORTANT TO MEMBERSHIP

- The Bicycle Boulevards campaign is significantly more important to nonmembers, while state advocacy is more important to current members.
- Safety related issues are more important to former BTA members and nonmembers.

Please rank the 3 activities that you believe are most important for supporting bicycling in your community.

(% Ranking Item in Top 3)

