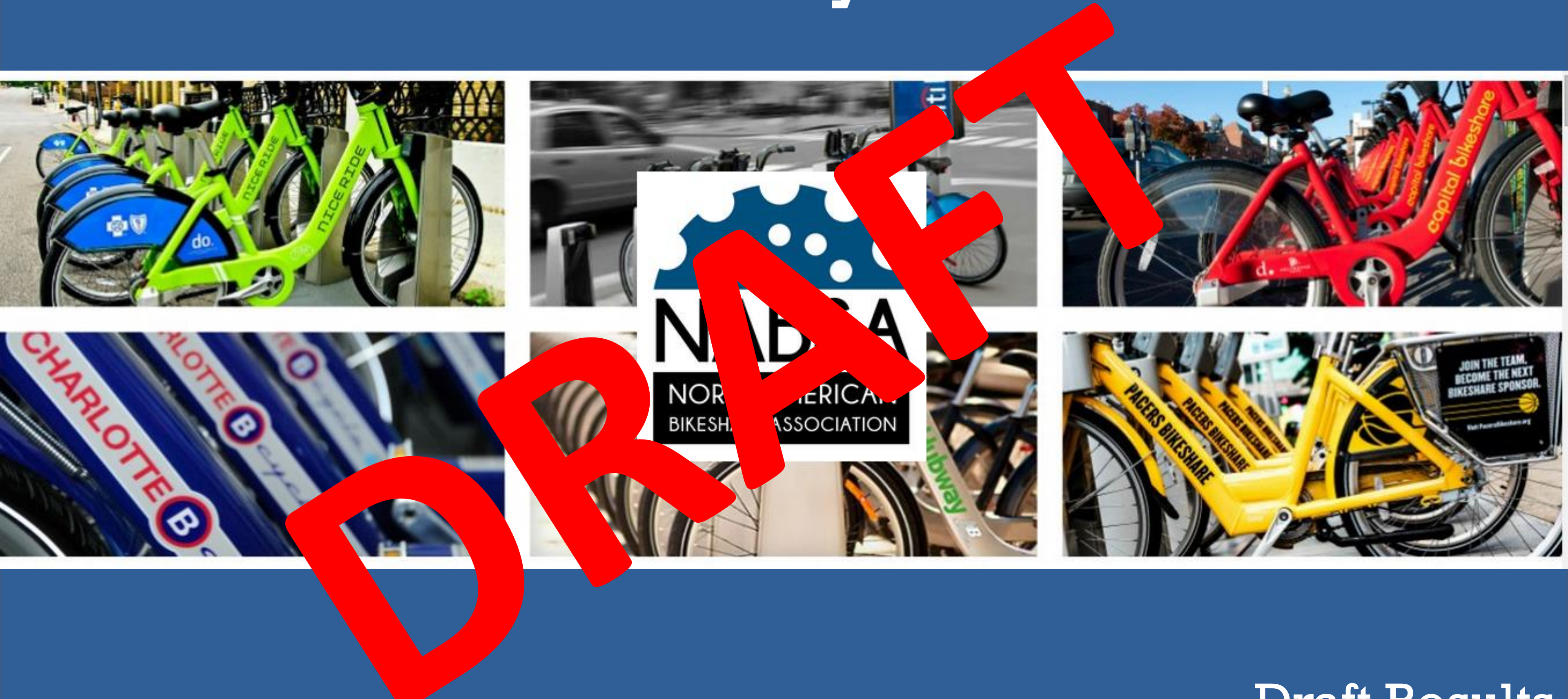
NABSA Annual Survey Summary 2015



Draft Results

March 4, 2016

TrueBearing see further.

Produced by NABSA with support from TrueBearing Consulting

About Respondents

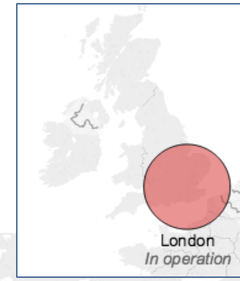
Governance Structure

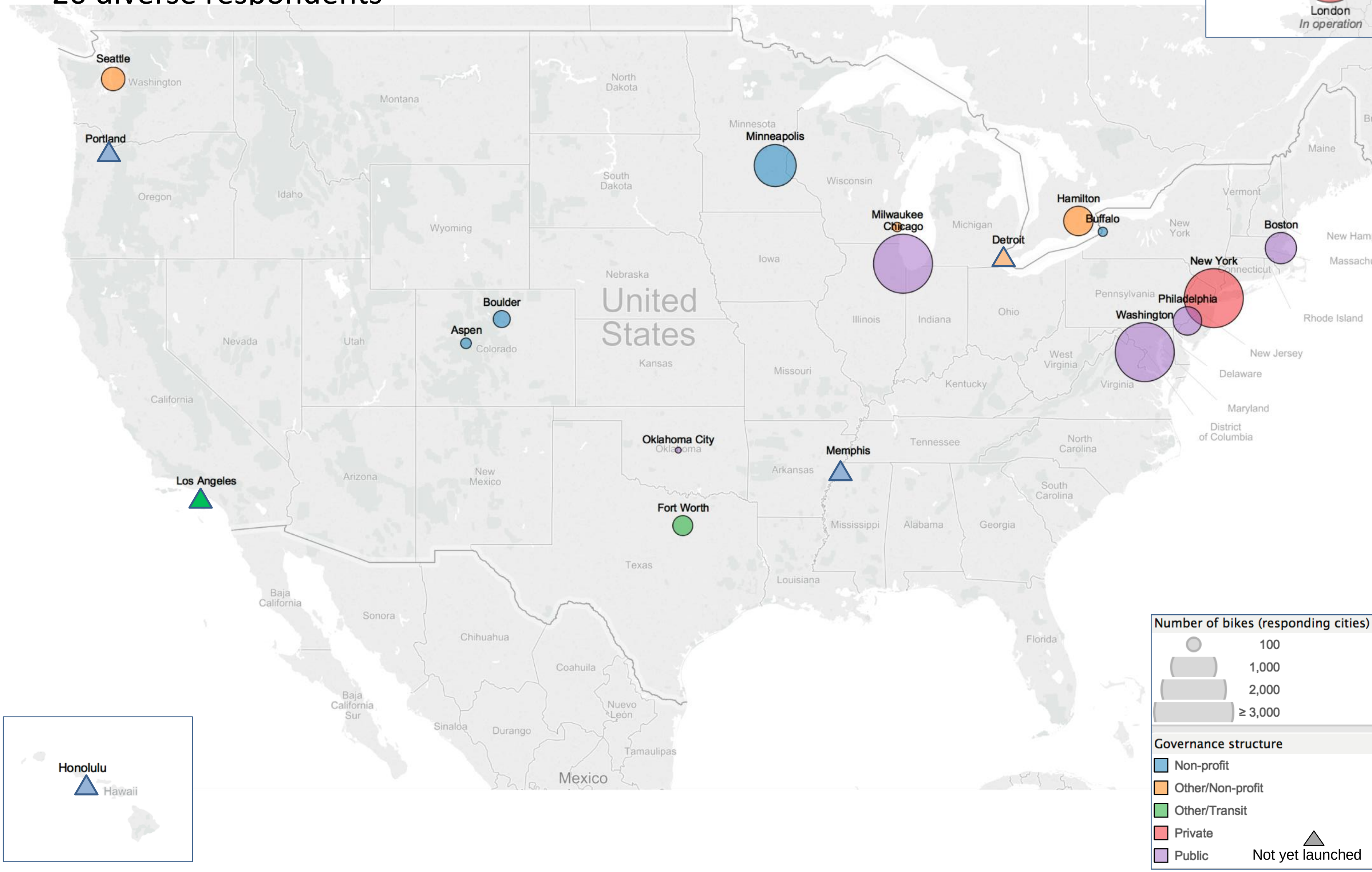
Variety of governance structures

Governance Structure	City
Non-Profit (Non-profit owns and operates)	Aspen Boulder Buffalo Honolulu Memphis Minneapolis
Private/For-Profit (For-profit owns and operates)	New York City
Public (City owns/third party operates)	Boston Chicago London Oklahoma City Philadelphia Portland Washington DC
Other/ Non-Profit Public -Non Profit (Public owned/Non-profit operated) Public -Non Profit (City owned/non-profit operated) Public/non-profit partnership Non-Profit owns, for-profit operates	 Hamilton Detroit Milwaukee Seattle
Other /Transit City & Transit Authority own/third party operates Transit Authority owns, non-profit operates	 Los Angeles Fort Worth

Respondents

20 diverse respondents

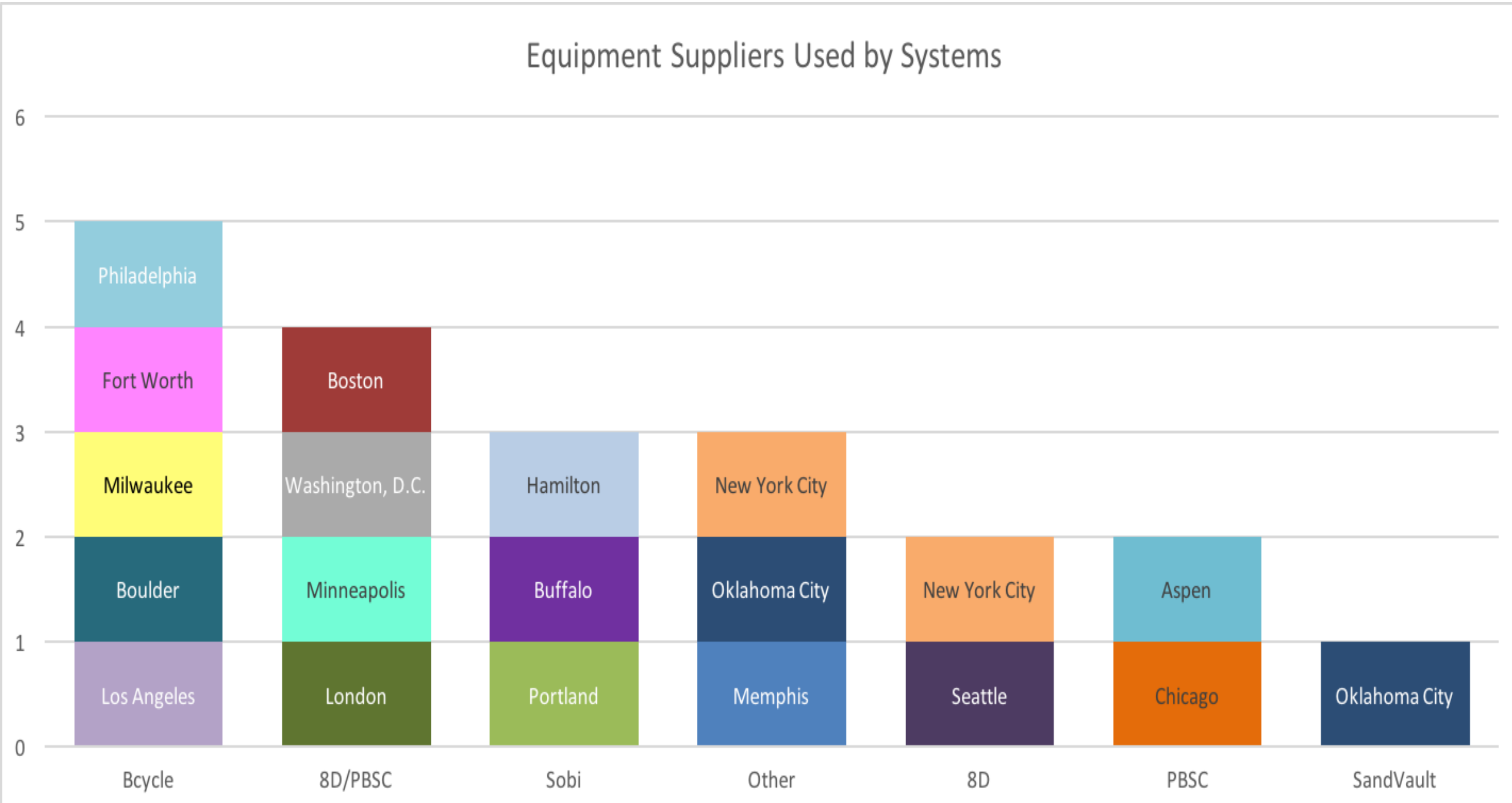




Equipment & Operations

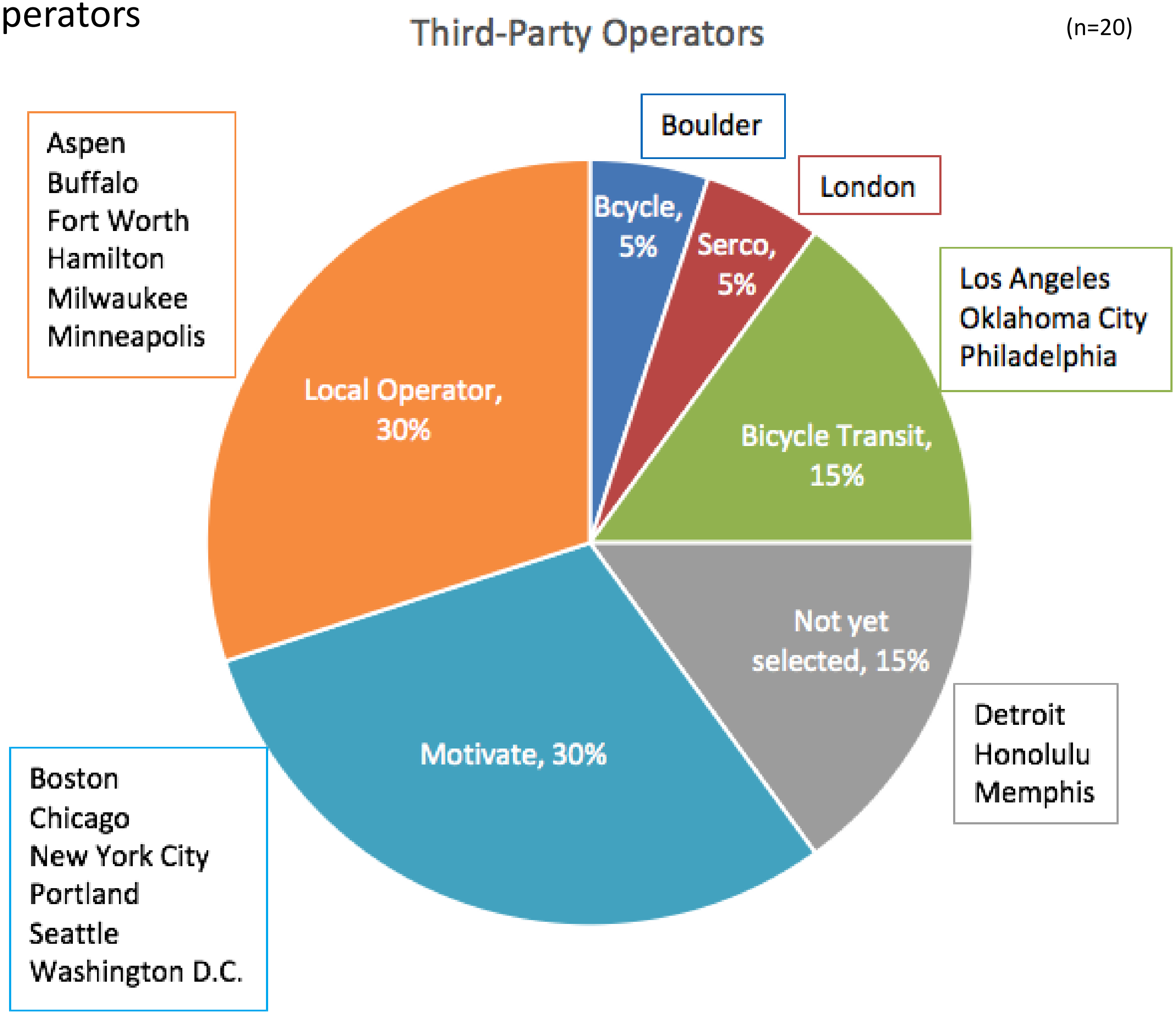
Equipment Suppliers

Variety of equipment suppliers



Operators

Variety of operators

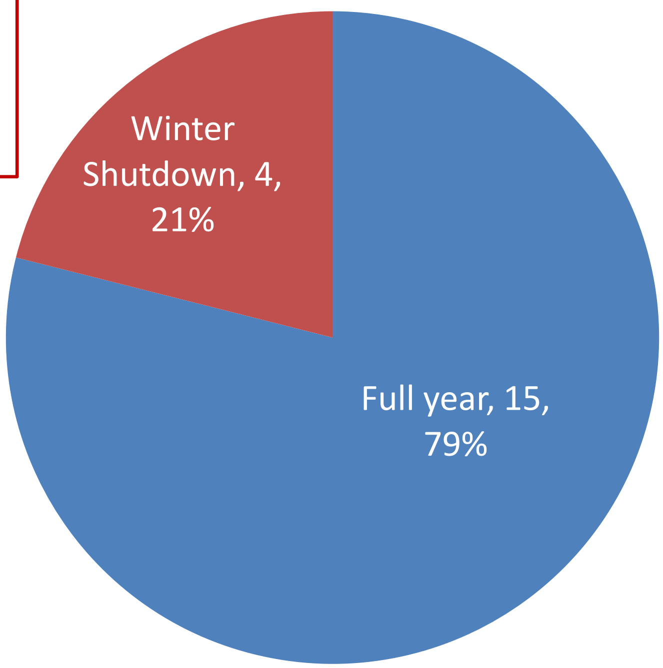


Seasonality

Winter Operations

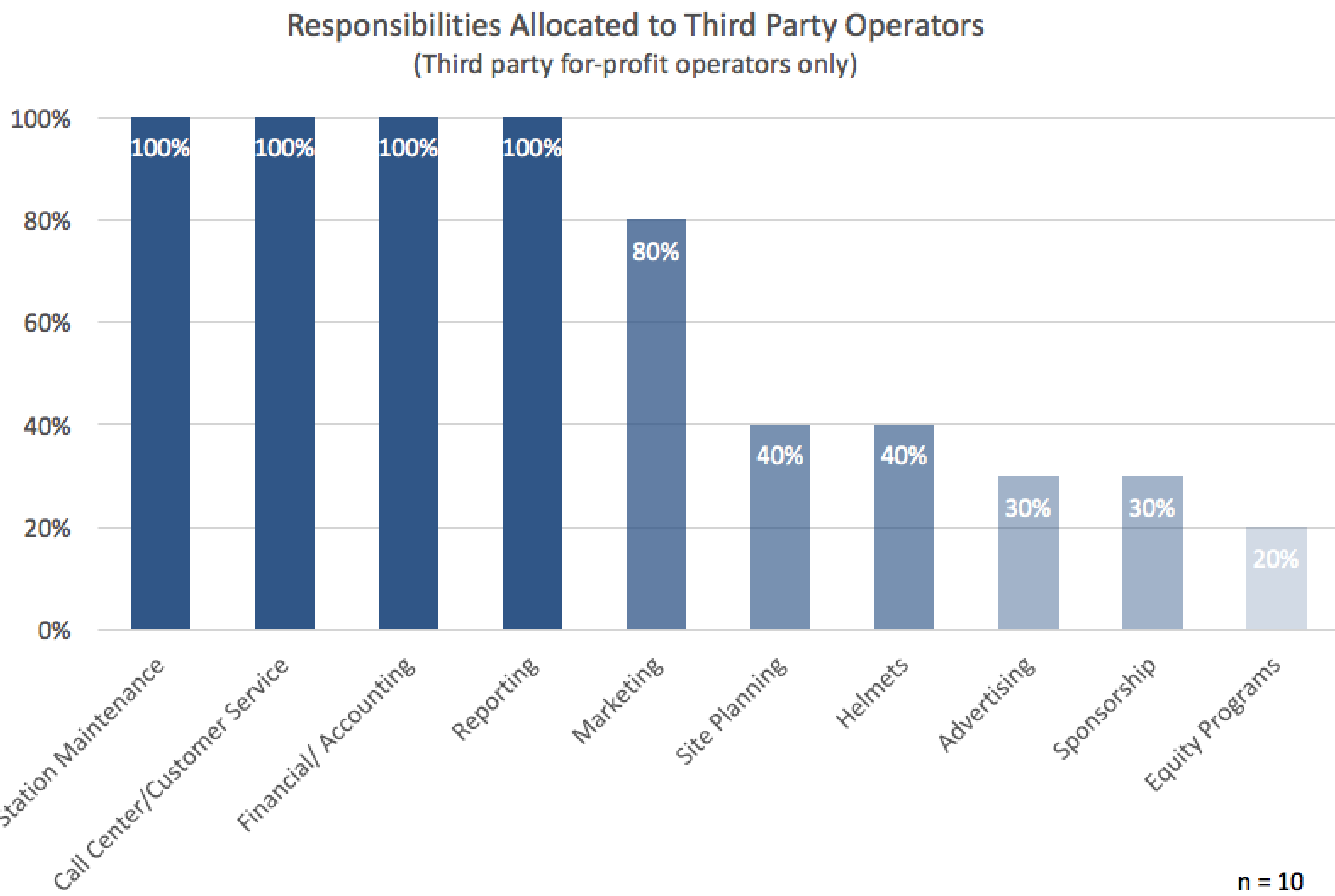
(n=19)

Detroit
Boston
Aspen
Minneapolis



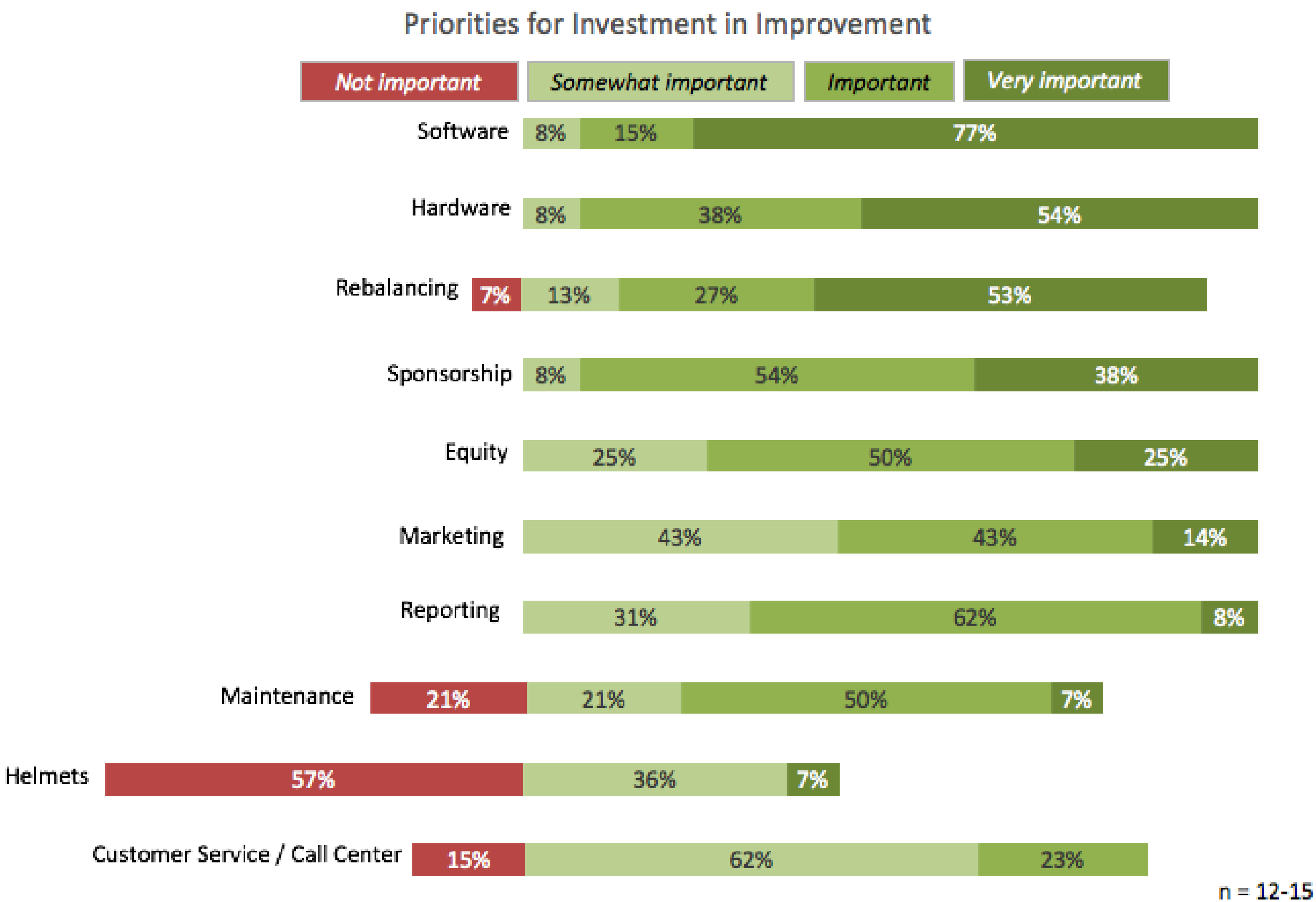
Boulder
Los Angeles
Oklahoma City
Philadelphia
Chicago
New York City
Portland
Washington DC
London
Fort Worth
Hamilton, ON
Milwaukee
Memphis
Honolulu

Operations



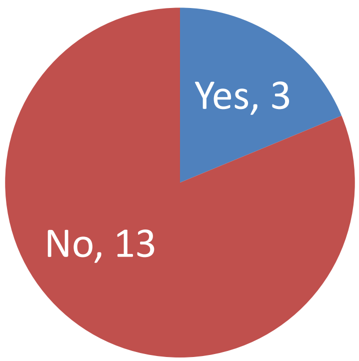
Responsibilities Allocated to Third Party Operators
(Third party for-profit operators only)
100%
80%
60%
40%
20%
0%
100%
100%
100%
100%
80%
40%
40%
30%
30%
20%
Bike and Station Maintenance
Call Center/Customer Service
Financial/ Accounting
Reporting
Marketing
Site Planning
Helmets
Advertising
Sponsorship
Equity Programs
n = 10

Priorities for Improvement

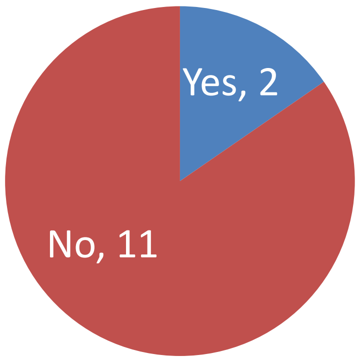


Helmets

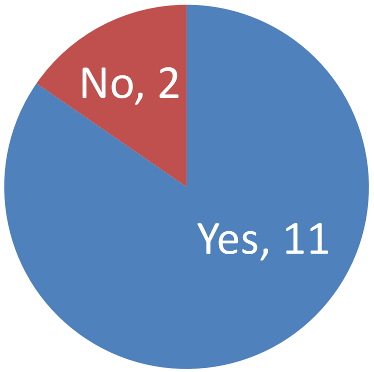
Are helmets required to ride your bikes?



Can members purchase helmets via the website?



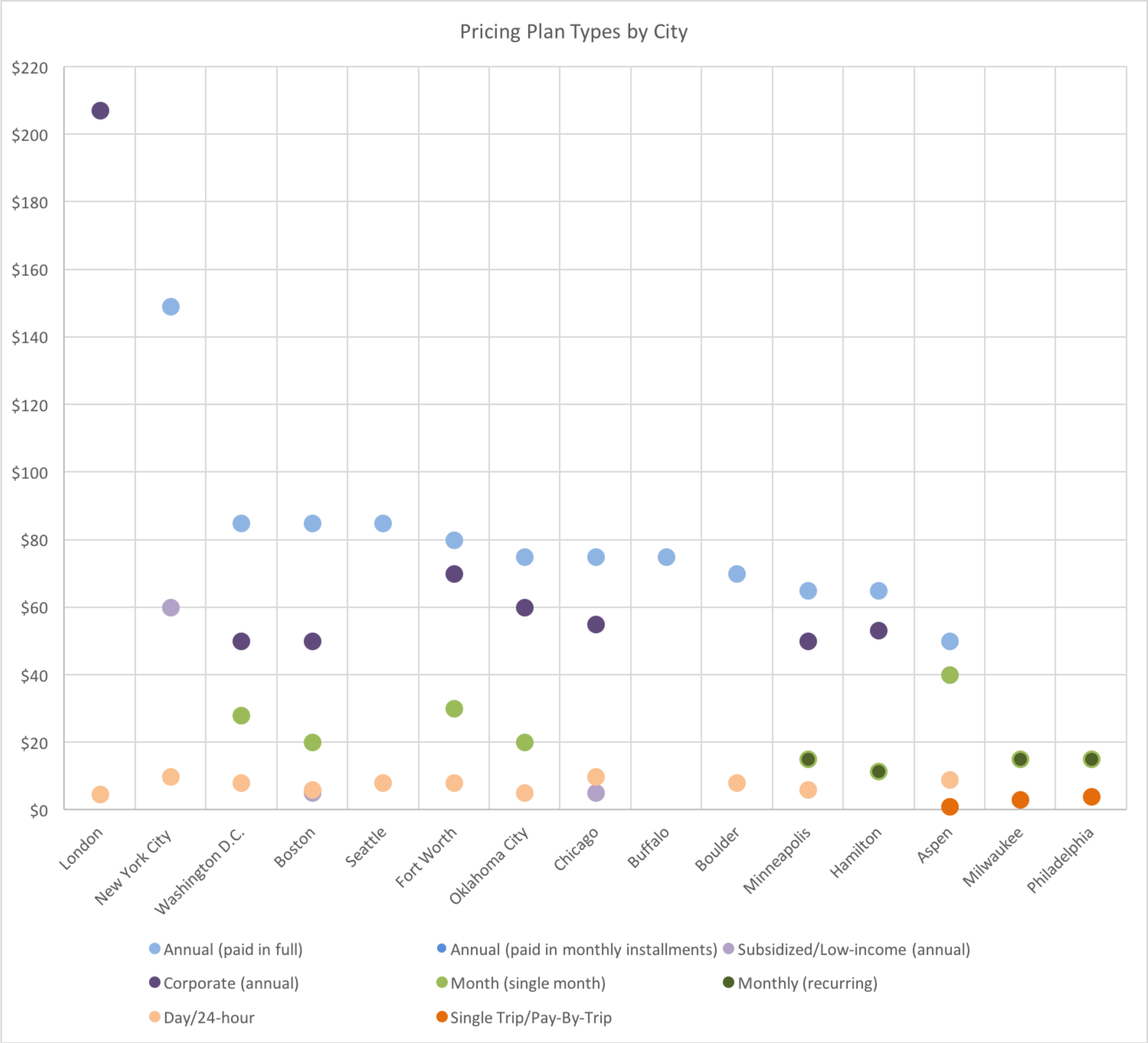
Can members purchase helmets at partner locations?



Highlights
Most cities make some effort to make helmets available
Seattle has a mandatory helmet law and has self-service bins at all stations
A few cities have no program and do not believe helmets should be promoted

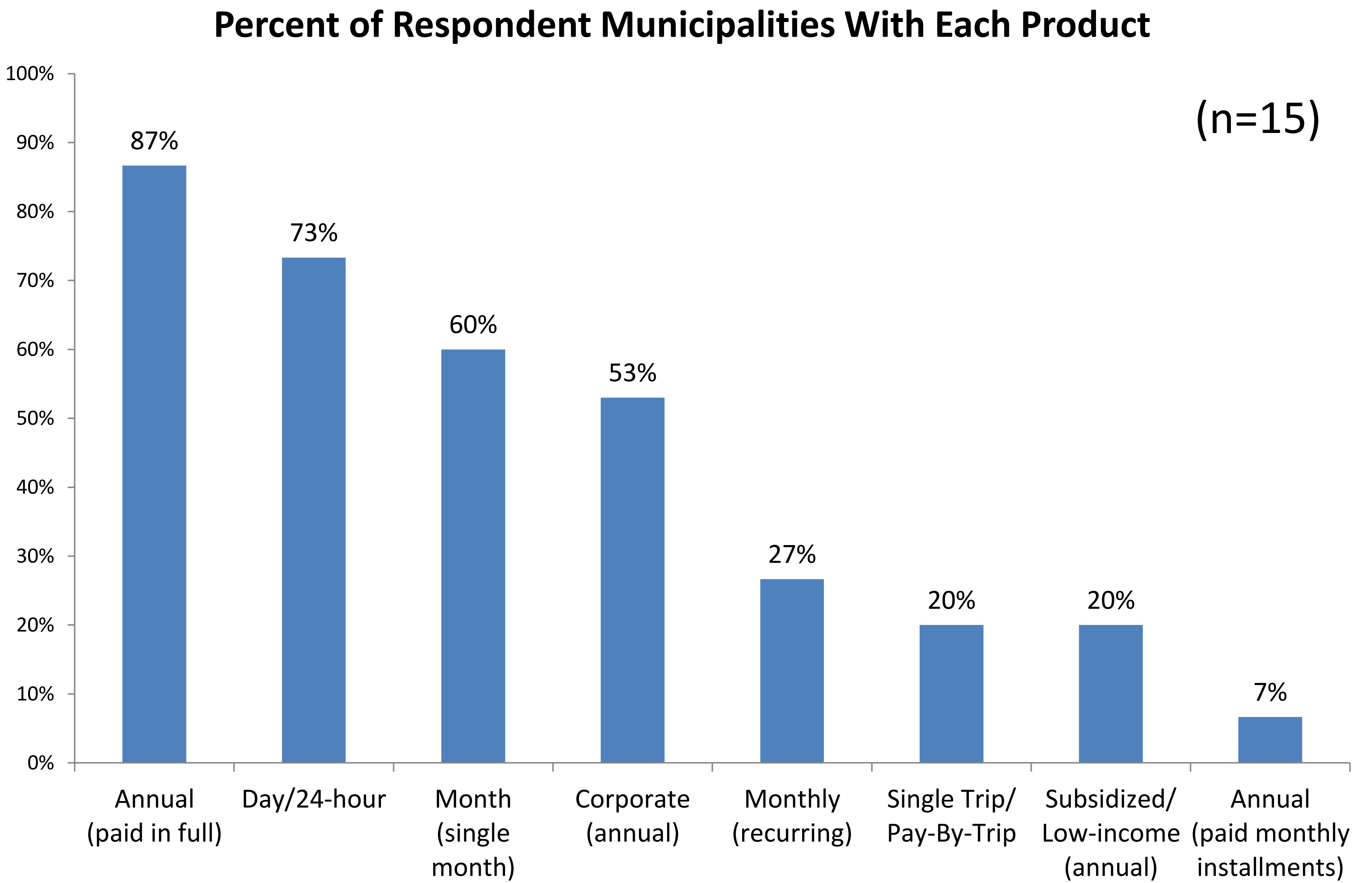
Pricing

Pricing



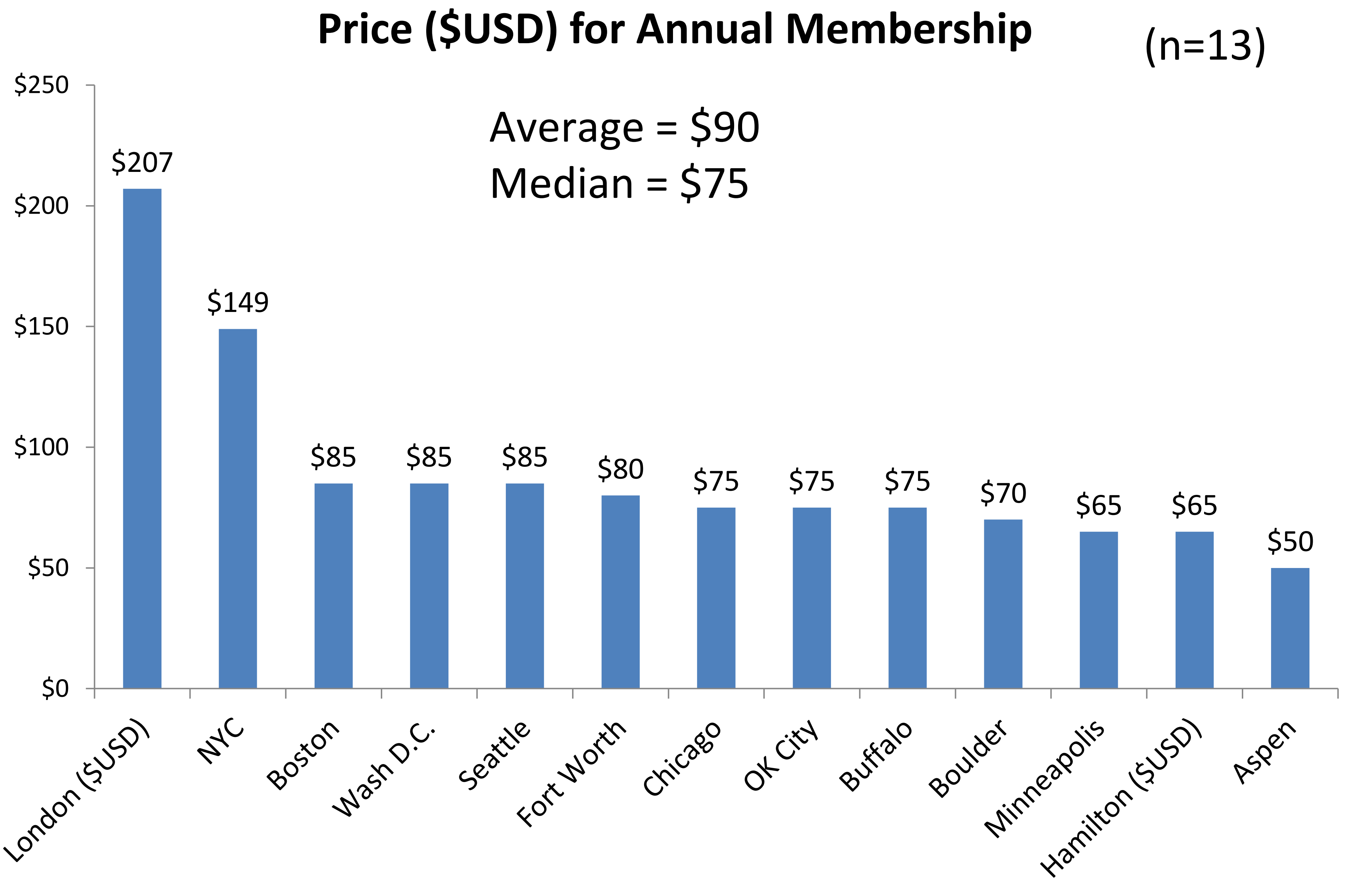
Pricing Plan Types by City
$220
$200
$180
$160
$140
$120
$100
$80
$60
$40
$20
$0
London
New York City
Washington D.C.
Boston
Seattle
Fort Worth
Oklahoma City
Chicago
Buffalo
Boulder
Minneapolis
Hamilton
Aspen
Milwaukee
Philadelphia
Annual (paid in full)
Annual (paid in monthly installments)
Subsidized/Low-income (annual)
Corporate (annual)
Month (single month)
Monthly (recurring)
Day/24-hour
Single Trip/Pay-By-Trip

Pricing

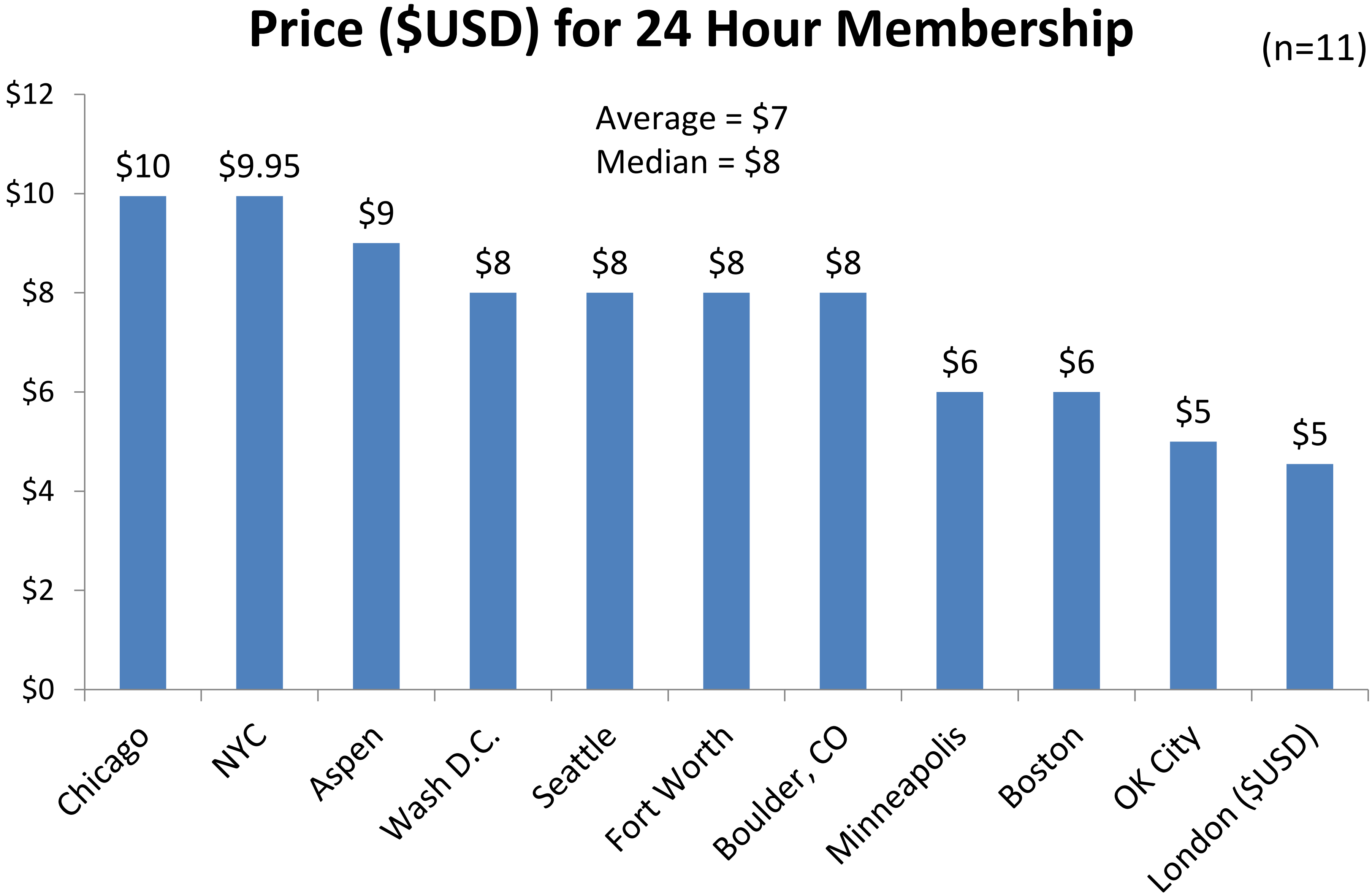


Percent of Respondent Municipalities With Each Product
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
(n=15)
87%
73%
60%
53%
27%
20%
20%
7%
Annual (paid in full)
Day/24-hour
Month (single month)
Corporate (annual)
Monthly (recurring)
Single Trip/ Pay-By-Trip
Subsidized/ Low-income (annual)
Annual (paid monthly installments)

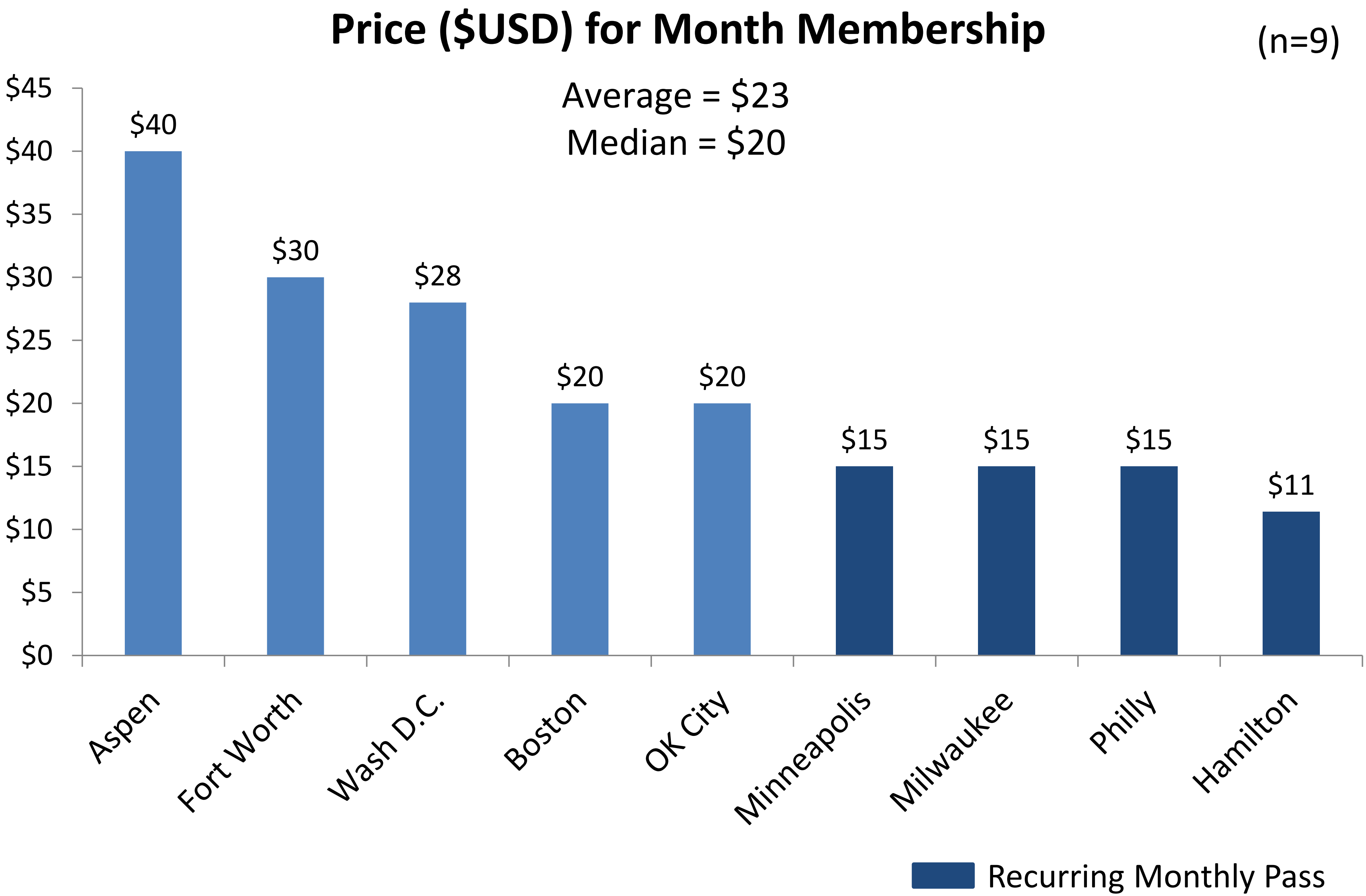
Pricing


Price ($USD) for Annual Membership
(n=13)
Average = $90
Median = $75
$250
$200
$150
$100
$50
$0
$207
$149
$85
$85
$85
$80
$75
$75
$75
$70
$65
$65
$50
London ($USD)
NYC
Boston
Wash D.C.
Seattle
Fort Worth
Chicago
OK City
Buffalo
Boulder
Minneapolis
Hamilton ($USD)
Aspen

Pricing


Price ($USD) for 24 Hour Membership
(n=11)
Average = $7
Median = $8
$12
$10
$8
$6
$4
$2
$0
$10
$9.95
$9
$8
$8
$8
$8
$6
$6
$5
$5
Chicago
NYC
Aspen
Wash D.C.
Seattle
Fort Worth
Boulder, CO
Minneapolis
Boston
OK City
London ($USD)

Pricing


Price ($USD) for Month Membership
(n=9)
Average = $23
Median = $20
$45
$40
$35
$30
$25
$20
$15
$10
$5
$0
$40
$30
$28
$20
$20
$15
$15
$15
$11
Aspen
Fort Worth
Wash D.C.
Boston
OK City
Minneapolis
Milwaukee
Philly
Hamilton
Recurring Monthly Pass

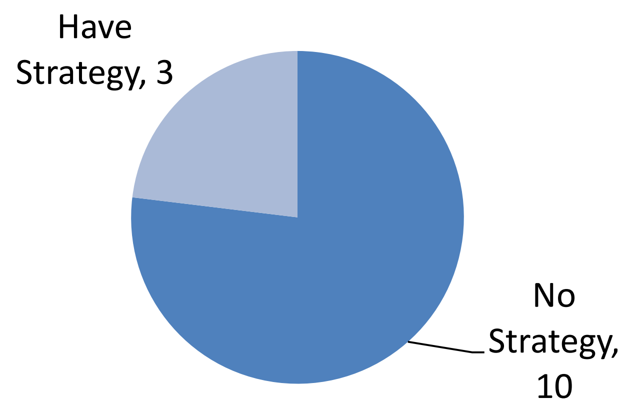
Pricing

Other Products	City
Hourly/ Pay as you Go Hamilton - $4/hour, prorated by the minute; Philly – price per 30 minutes Buffalo – Option to pay $.04/minute with $10 activation	Philadelphia, Hamilton, Buffalo
Single Trip $1 Aspen; $3 Milwaukee, $4 Philly	Aspen, Milwaukee, Philly
Corporate Memberships Most cities $50-$70, London is the exception at $207	London, DC, Boston, Ft Worth, Seattle, OK City, Chicago, Hamilton, MN
Day Key Washington - $10 initial fee + $7/day	Washington DC
Recurring 30 Day	Minneapolis, Hamilton, Milwaukee, Philly
Targeting Students Ft Worth – 6 month for $50; Boulder 150 days for $45, Buffalo - discount	Ft Worth, Boulder, Buffalo
Premium Membership Hamilton – "Power User" gets 90 minutes; Seattle - $125 with Tee shirt and bag	Hamilton, Seattle
Low-Income Membership $5 for Chicago and Boston. NYC $60	Chicago, Boston, NYC

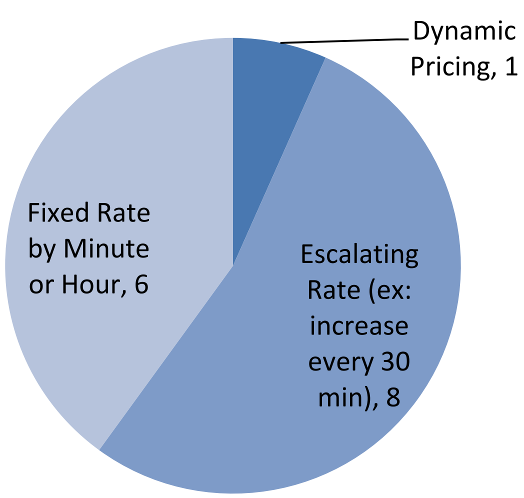
Price Changes

City	Strategy for Price Increase
DC	Every other year, based on CPI & public input
London	Regular price increases are planned for every two years in line with inflation. This is what is included in the business plan but we can choose to change tariff with required approvals whenever we want. Tariff changes have always been done in January.
Philly	We will reassess on an annual basis. Goal is for static price as long as possible.

Do you have a Strategy for Regular Price Increases? (n=13)



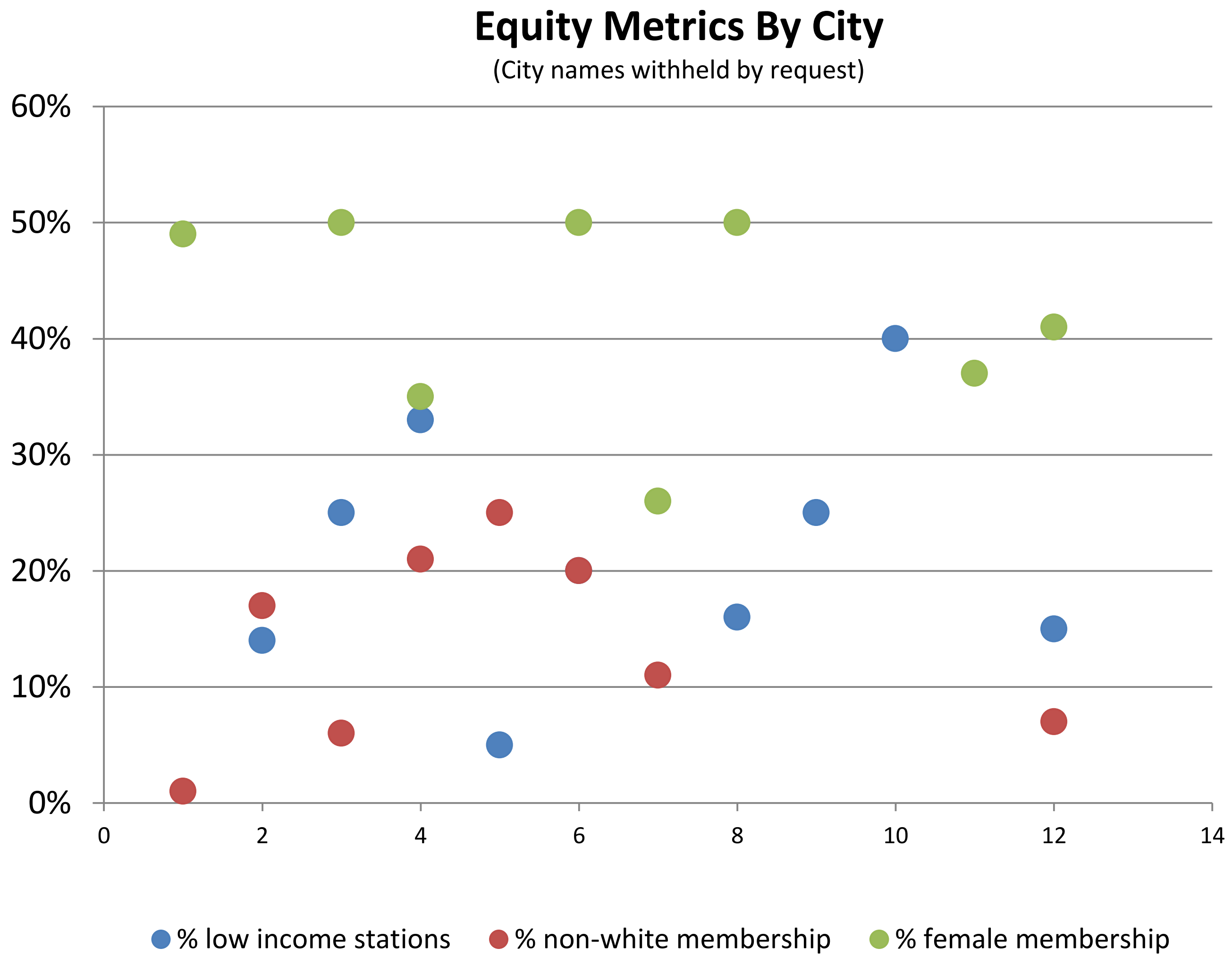
Approach to Overage Fees (n=15)



Themes	Cities & Description
Increased Daily Pass	Boston - Increase \$5-\$6 Boulder - Increased \$5-\$8 Chicago - Increase \$7-\$9.95 London - Increased £1 to £2
Changed Free Period	Aspen - Changed from 15 to 30 min increments Boulder - Reduced from 60 to 30 min Minneapolis - Member 60 min, casuals 30 min free
Corporate Memberships	Boston - Created corporate membership Minneapolis - Reduced Price \$65-\$50
Increased Annual Pass	London - Doubled £45 to £90 Washington DC - Increased 14%

Equity

Equity



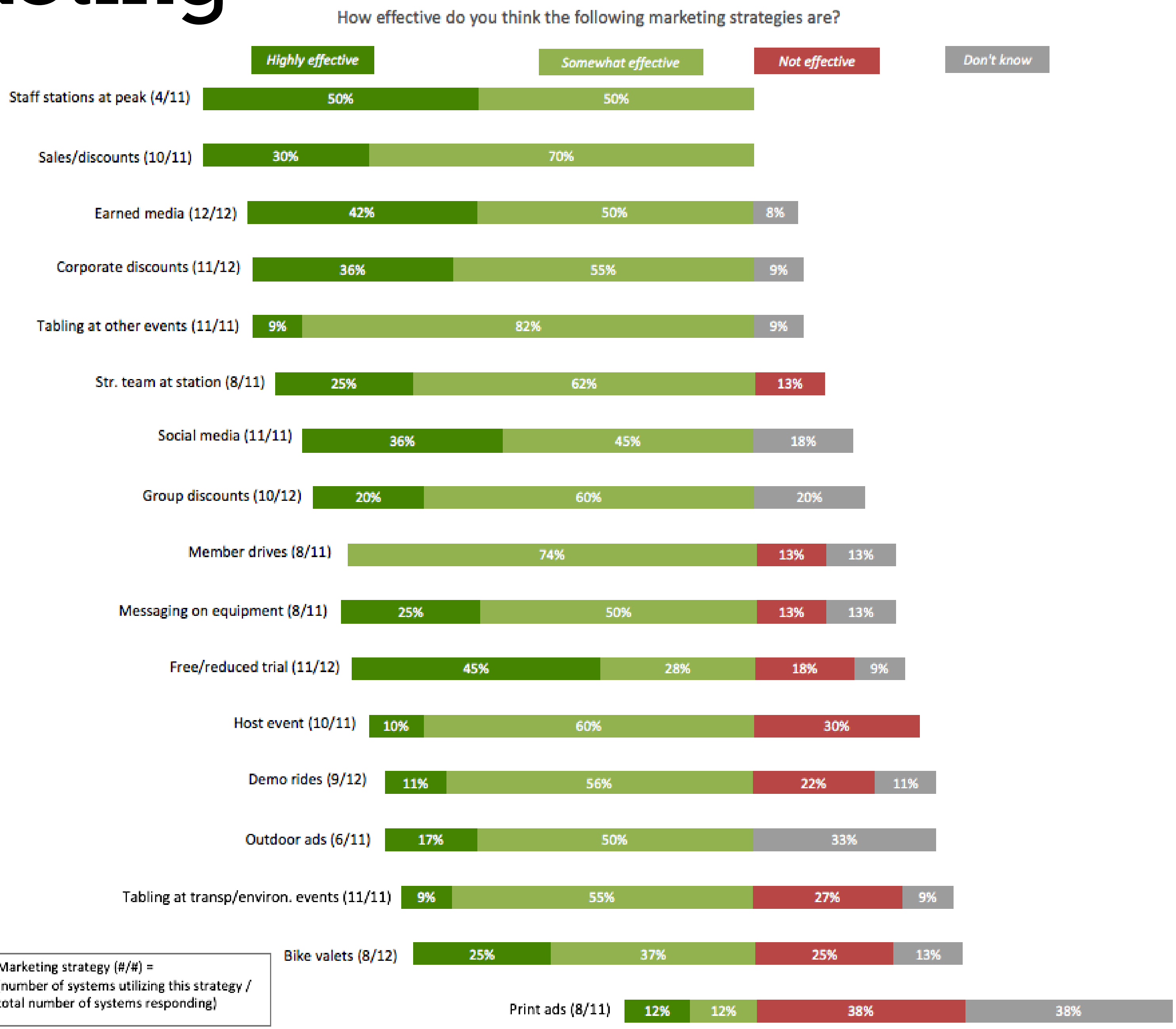
Equity Metrics By City
(City names withheld by request)
60%
50%
40%
30%
20%
10%
0%
0
2
4
6
8
10
12
14
% low income stations
% non-white membership
% female membership

Equity

Strategy	Cities
Credit Card Alternative	Washington DC – “Bank on DC” program Portland – Exploring cash fare service Philadelphia – Allows cash payment at 7-eleven Boston – In-person registration accommodates unbanked
Low-Income Membership	Washington DC – Free or $25 for eligible residents Boston - $5 membership for 400% of poverty line. Going to two tier system with $50 for 200-400%. Seattle –$5 membership program in planning phase Portland – Single ticket fare, $2.50/30 minutes for 150% of poverty Hamilton – Free memberships through “Everyone Rides” initiative Minneapolis – Free memberships neighborhood based and/or targets students
Pricing	Philadelphia – Flexible payment with monthly billing option Buffalo NY – Dynamic pricing better suits low-income
Public Housing Partnership	Seattle – Sold 35 low-income memberships Boulder – Distributed 80 free passes to Boulder Housing Partnership

Marketing

Marketing



Marketing strategy (#/#) =
(number of systems utilizing this strategy / total number of systems responding)

Marketing

Recurring Strategies Cited as Most Successful	Cities
Corporate Discount	"Most effective was this year's marketing program for employers …Half of our annual members are now through the employer partnership/discount program. We reduced the price of a membership from $65 to $50 for these groups, and expect the partner to pay at least $15 towards the cost of each membership." - Minneapolis "$25 off for corporate members. Effective." - Washington DC
Earned Media	"…We saw a massive increase in casual usage (This was the year after NYC, CHI, launched and captured a good deal of mainstream media attention" - Minneapolis
The Stations and Bikes	"The best marketing is bikes being ridden! " - Aspen
Free Bike Share Day/Weekend/ etc	"…The free weekend promotion where free access (£2) over one weekend is given to encourage users to trial the scheme, drove over 10k new users "- London

Marketing

Other Interesting Strategies	Description	City
“Cross-Pollination” Events	Large events to very like-minded demographic	Aspen
Abutter Promotion	Sending postcards to neighbors of station	Washington DC
Unicorn Bike	Specially decorated bike added to fleet. Attracts social media.	Minneapolis, Boston
Premium/Founding Membership	Extra benefits given with membership for additional fee	Seattle, Hamilton
Hotel Promotions	Hotel concierges as ambassadors	Aspen
Office/Software Changes	Hired staff, made coupons available online	Minneapolis
Great Customer Service		Philadelphia

Marketing

What Respondent Say Doesn't Work	Description
Random Free Passes	Free passes disseminated to general population not do much and are not redeemed.
Student Marketing	Student nut is hard to crack! Discounts have some promise
Discounts to wrong demo	Discounts to general population do not work. Need to promote to like-minded demo.

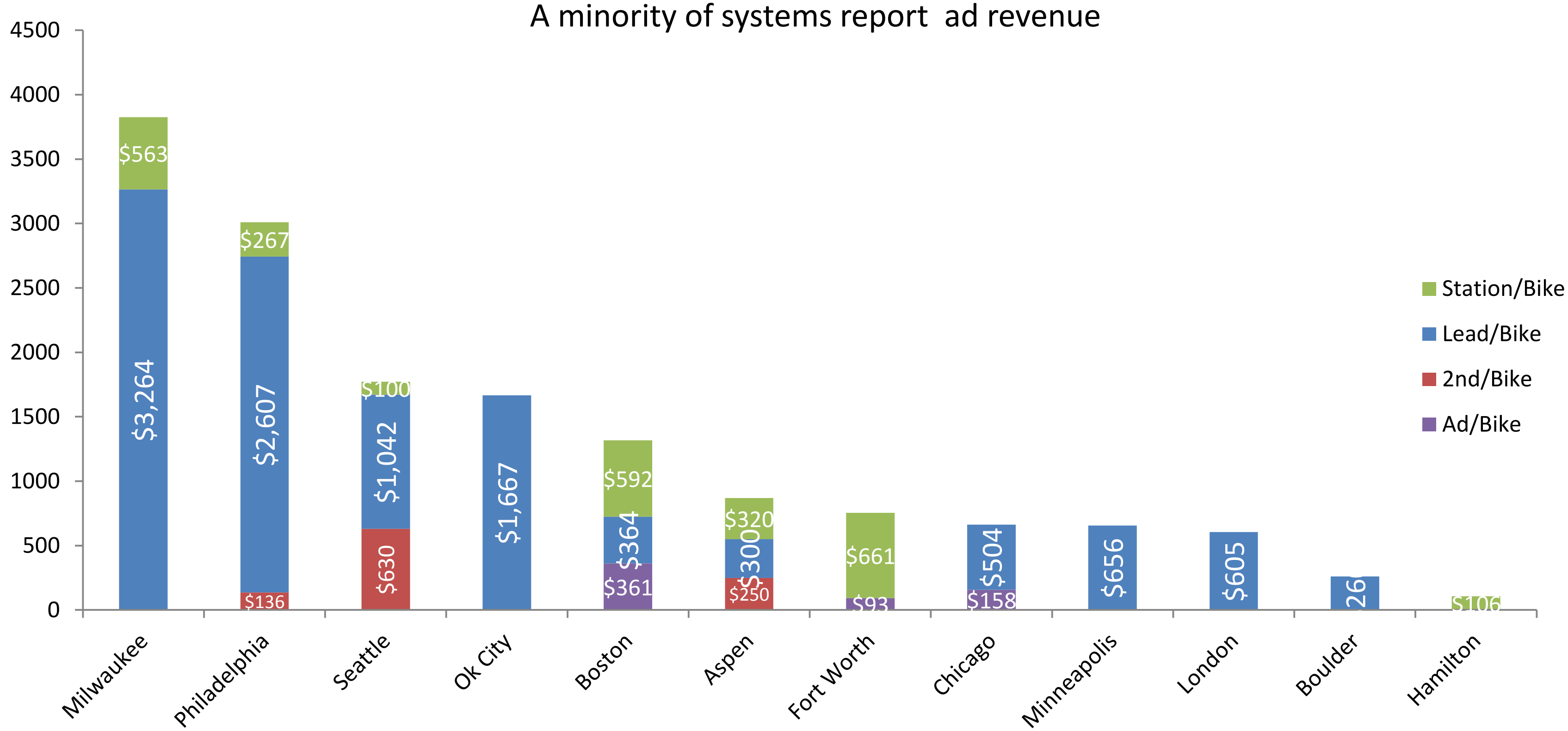
Sponsorship & Ads

Sponsorship & Ads

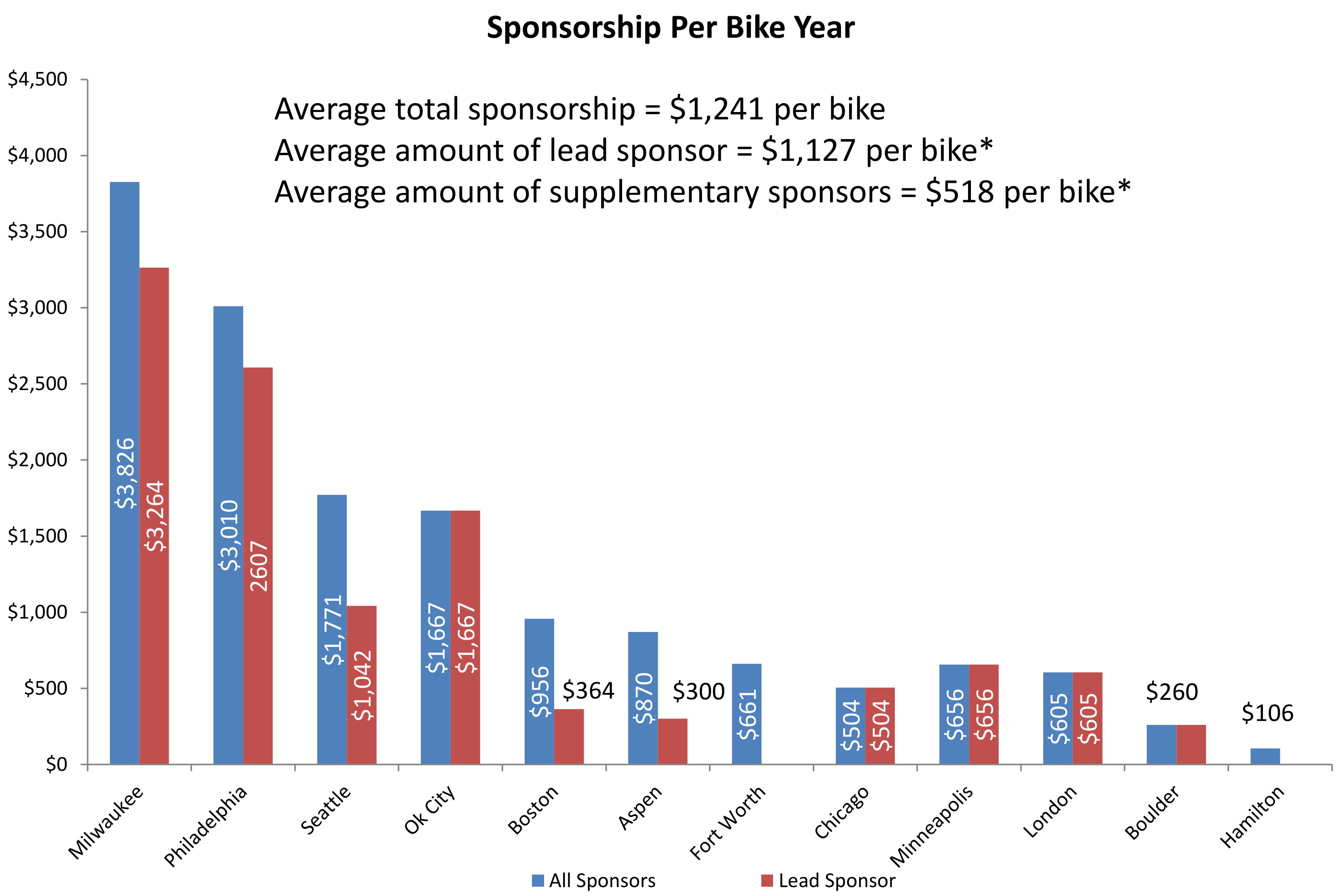
Total Sponsor and Ad Revenue Per Bike Year

Average Total, All Respondents = $1,292
Average Total, US Respondents = $1,479

Station and 2ndary sponsors substantially supplements lead sponsor
A minority of systems report ad revenue

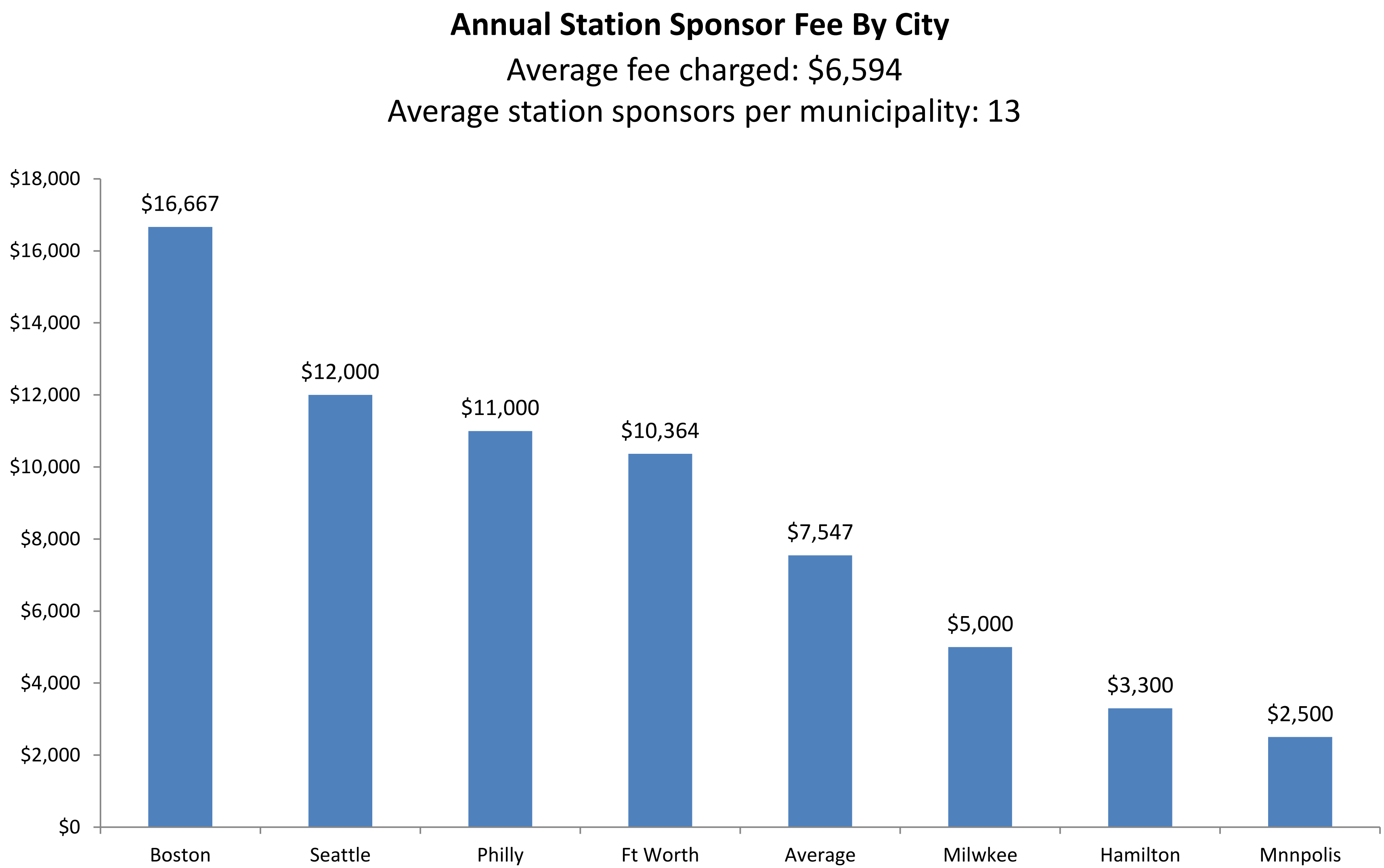


Sponsorship

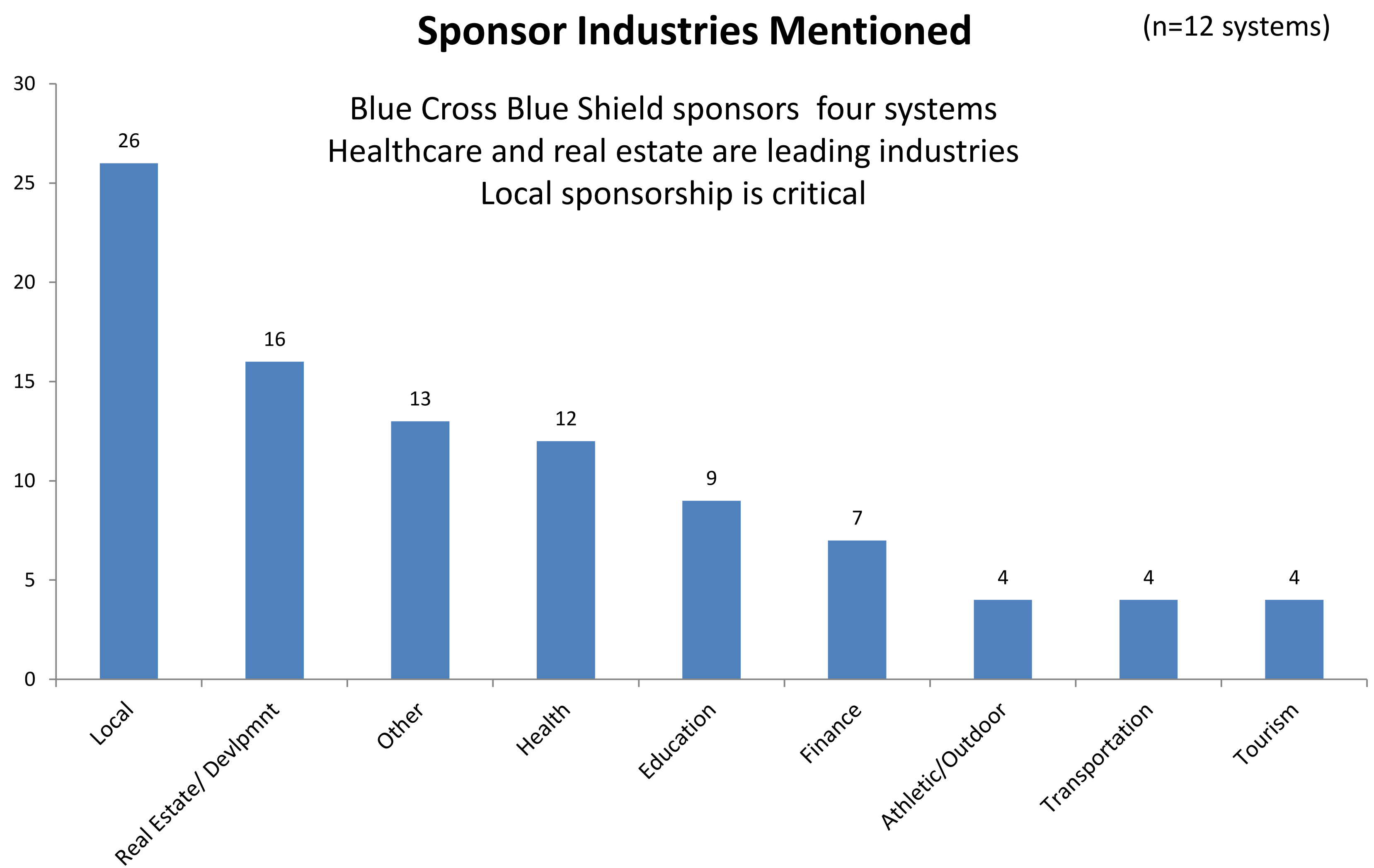


*Includes only those cities with lead and/or supplementary sponsors

Sponsorship



Sponsorship

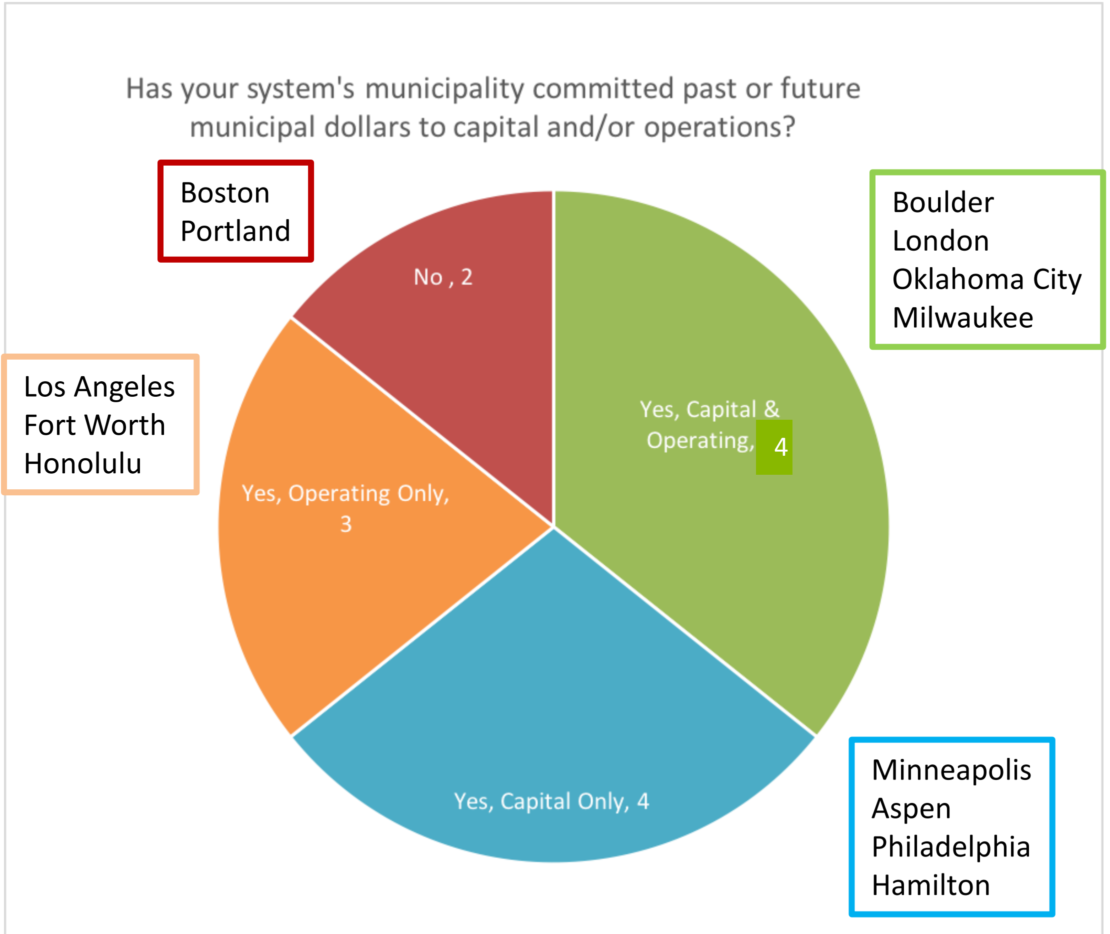


Public Funding

Public Funding Sources

Level	City	Type	Amount
City/County	Honolulu	City	$1M
City/County	Philadelphiia	City	$3M
City/County	Seattle	City	$5.6M
Federal	Boston	CDC Communities Putting Prevention to Work	$450k
Federal	Aspen	CMAQ	$235k
Federal	Boston	CMAQ	$1.5M
Federal	Washington, DC	CMAQ	
Federal	Chicago	CMAQ	$3M
Federal	Seattle	CMAQ	$1M
Federal	Washington, DC	Federal Land Access Program	$286k
Federal	Fort Worth	FHWA Bus Livability/State of Good Repair	$1M
Federal	Boston	FTA Bus Livability	$3.1M
Federal	Fort Worth	TE/FHA	$500,000
Federal	Chicago	TIGER	<$20M
Local	Boston	Barr Foundation	$450k
Local	Milwaukee	Department of City Development	
Local	Philadelphiia	Local foundations	$2.5M
Local	Philadelphiia	TAP Program (Regional)	$1.5M
Local	Honolulu	Ulupono	$260k
State	Washington, DC	VDOT	
Transit	Hamilton	Metrolinx	$1.6M
State	Boston	Public Works Economic Development	$250k
State	Seattle	WSDOT	$650k
State	Honolulu	State Department of Health	$1M

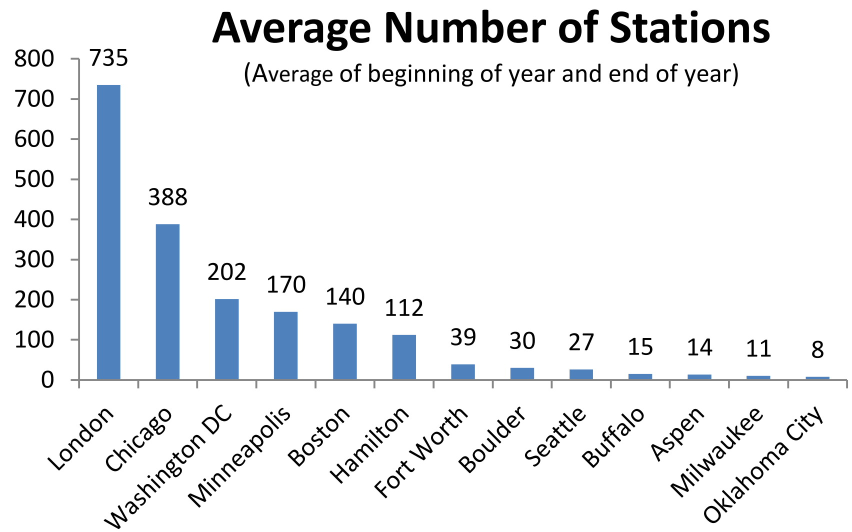
Public Funding

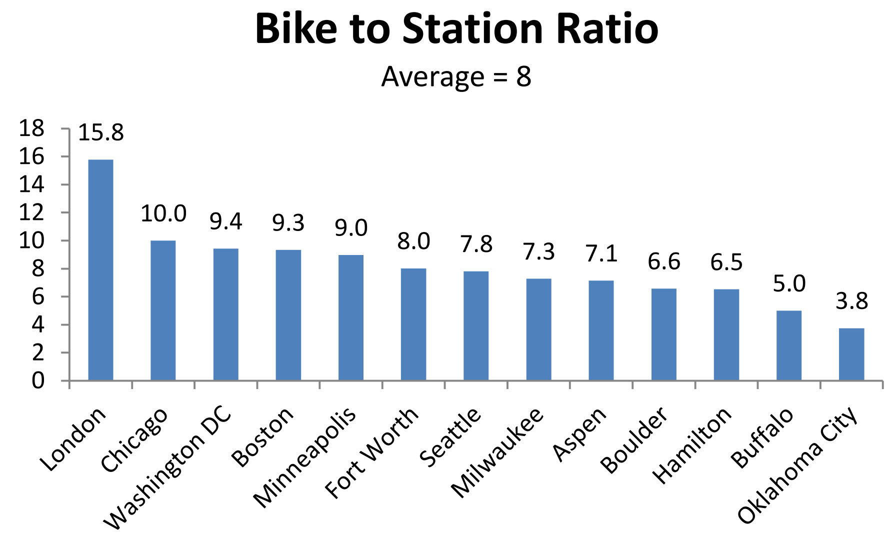


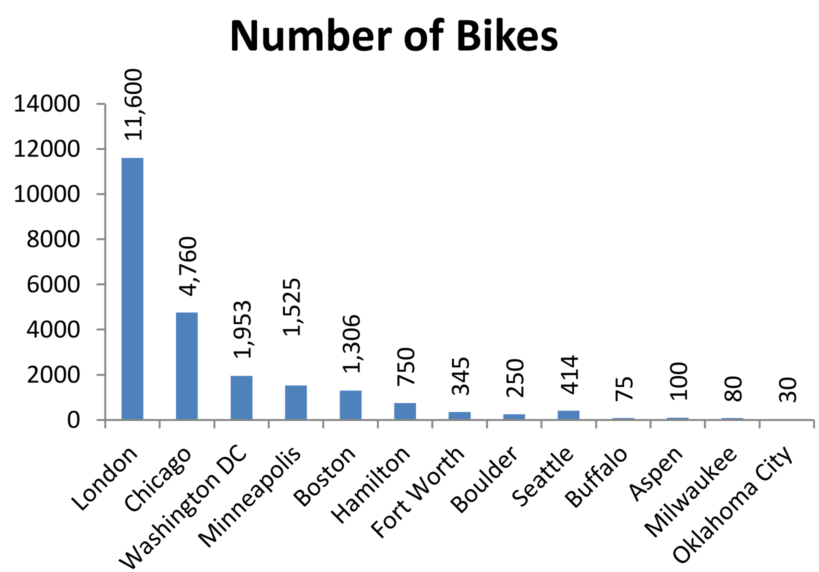
System & Financial Data*

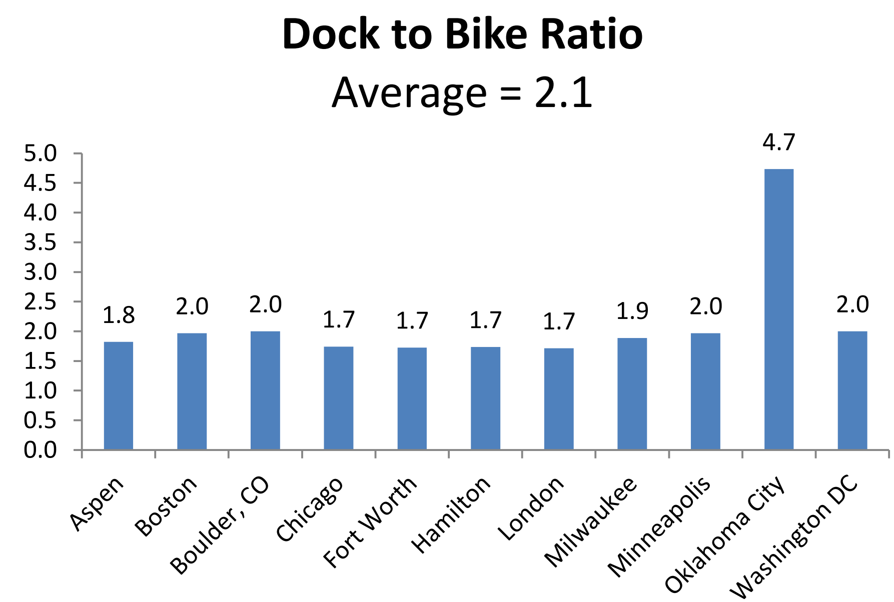
*Data for this section based on "last year" defined by the respondent as CY2014, FY2015, 12 months leading up to 9/2014 . Data for Boston is for Boston proper only, not full system. Boston represented about 66% of system during period.

Stations, Bikes, Docks

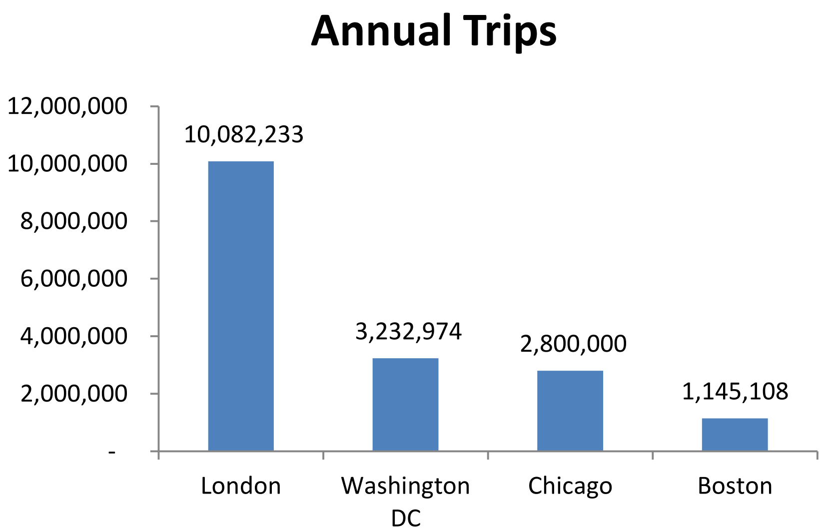


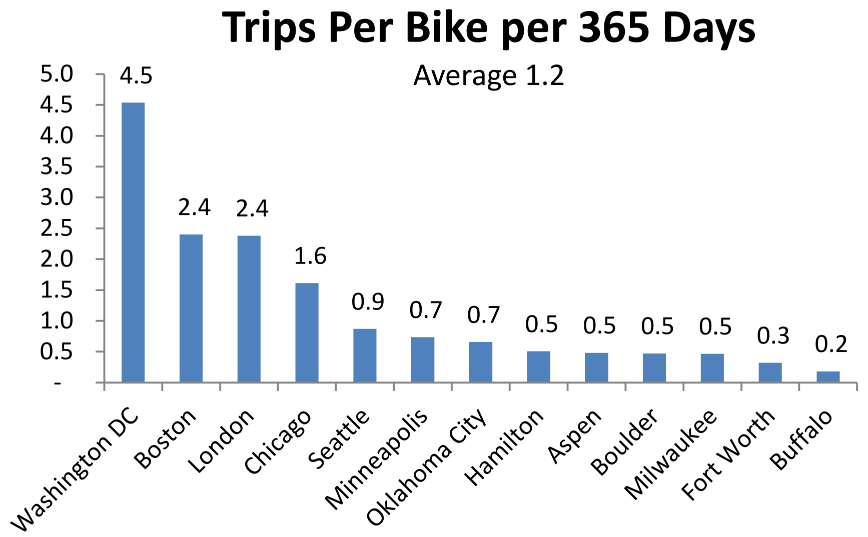


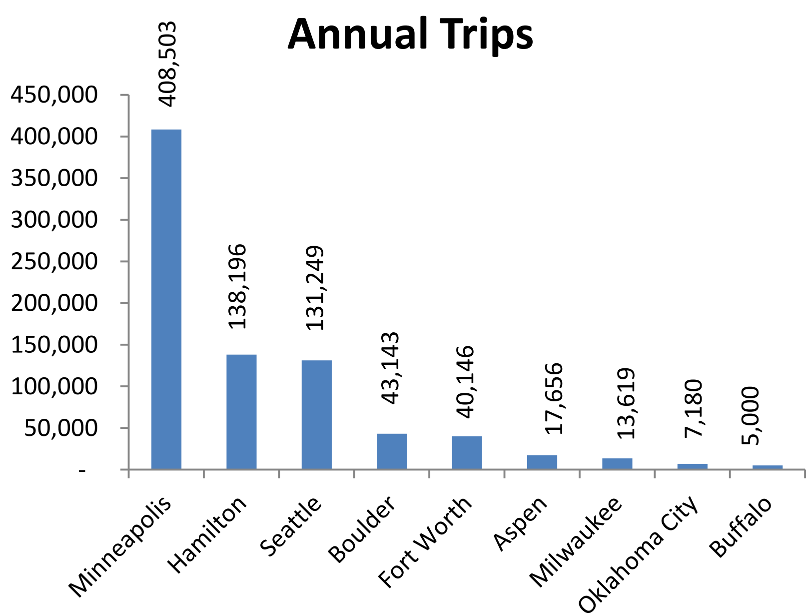


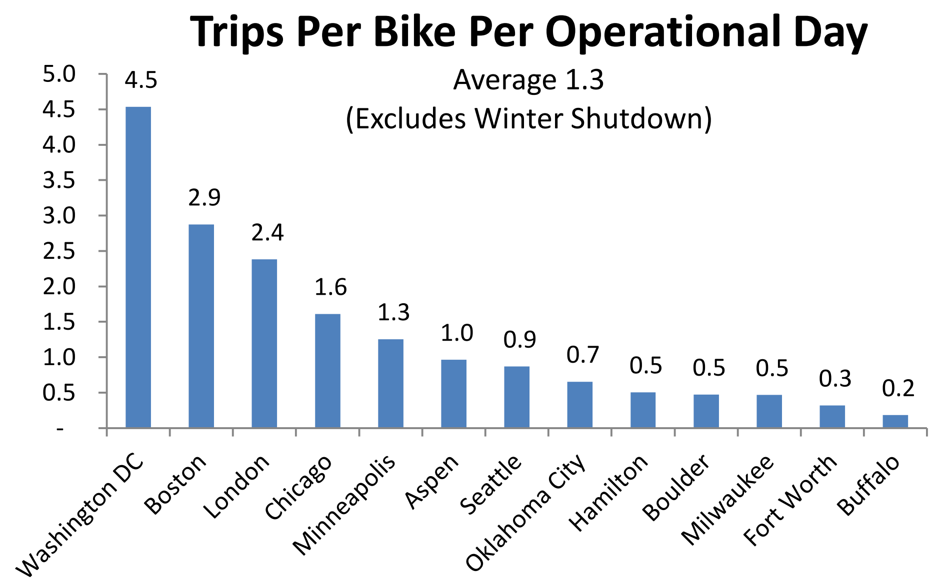


Annual Trips

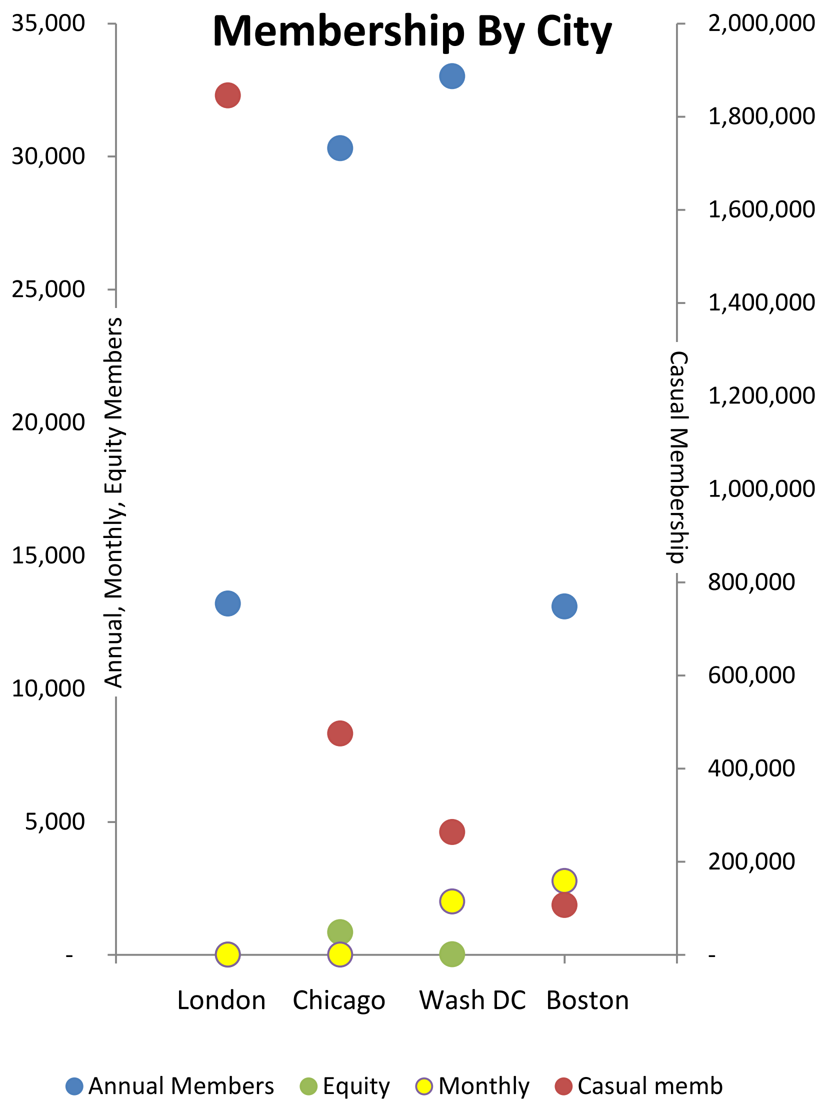




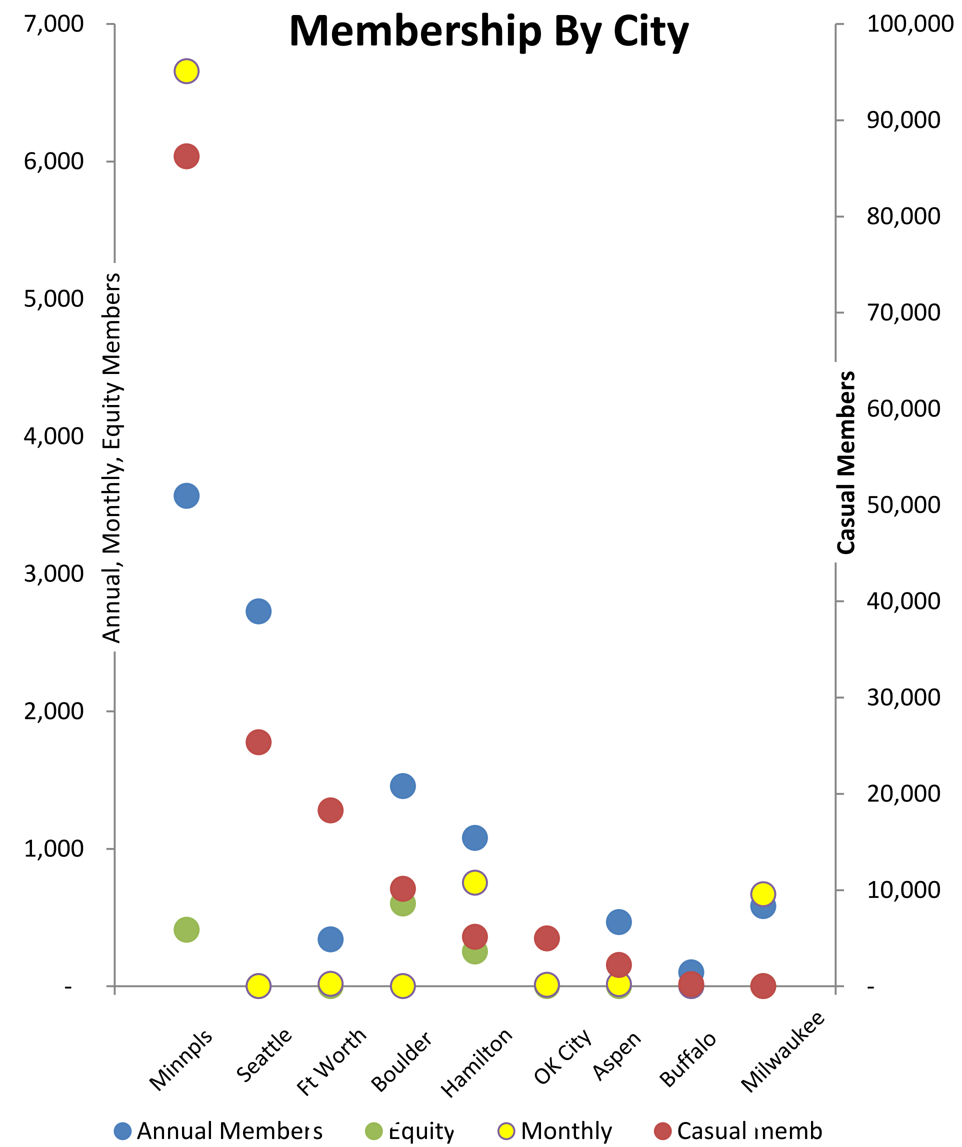




Membership



Membership By City
35,000
30,000
25,000
20,000
15,000
10,000
5,000
-
Annual, Monthly, Equity Members
2,000,000
1,800,000
1,600,000
1,400,000
1,200,000
1,000,000
800,000
600,000
400,000
200,000
-
Casual Membership
London
Chicago
Wash DC
Boston
Annual Members
Equity
Monthly
Casual memb

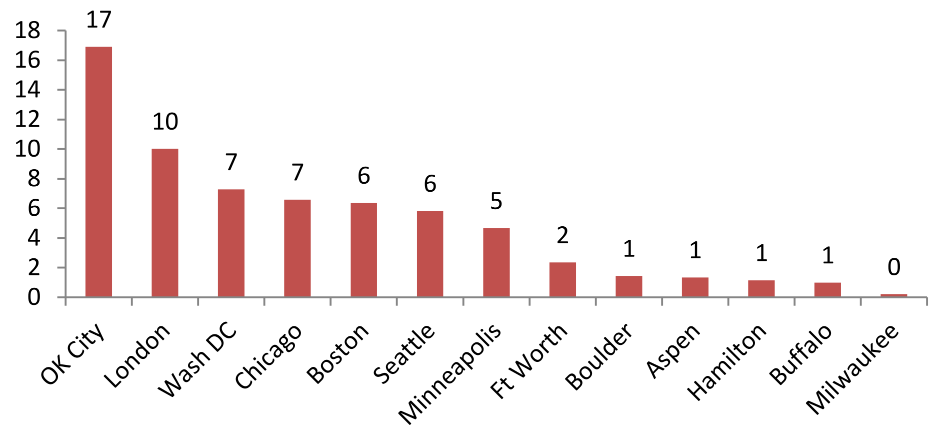


Membership By City
7,000
6,000
5,000
4,000
3,000
2,000
1,000
-
Annual, Monthly, Equity Members
100,000
90,000
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
-
Casual Members
Minnpls
Seattle
Ft Worth
Boulder
Hamilton
OK City
Aspen
Buffalo
Milwaukee
Annual Members
Equity
Monthly
Casual memb

Membership per Bike

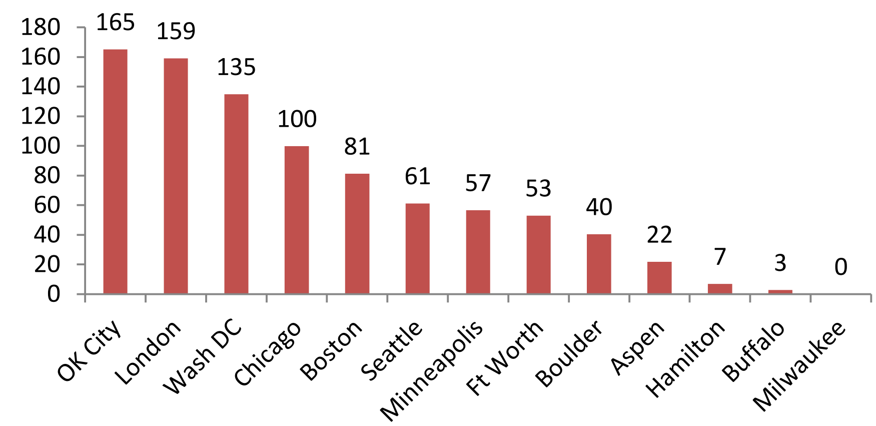
Annual Membership per Bike

Average = 5



Casual Membership per Bike

Average = 69



Total Trips by Annual and Casual Members

City	Trips By Annual Members	Trips By Casual Members	Trips Ratio: Trips by Annual to Casual Users
London	5,384,764	4,697,469	1.1
Washi DC	2,572,661	660,313	3.9
Chicago	1,900,000	900,000	2.1
Boston	892,082	253,026	3.5
Minneapolis	150,738	201,274	1.0
Seattle	79,373	51,876	1.5
Boulder	23,728	19,414	1.2
Aspen	11,147	-	
Fort Worth	10,537	29,409	0.4
Buffalo	3,000	-	
Average	**1,102,581**	**681,278**	**1.9**

Annual Trips Per Annual and Casual Members

City	Trip Per Annual Member	Trips Per Casual Member
London	408	2.5
Washington DC	8	2.5
Boston	68	2.4
Chicago	63	1.9
Minneapolis	42	2.3
Fort Worth	31	1.6
Buffalo	30	-
Seattle	29	2.0
Aspen	24	-
Boulder	16	1.9
Average (ALL)	**79**	**1.73**
Average (w/o London)	**42**	**1.73**

System Revenue Per Bike

City (# bikes)	System revenue per bike
Washington DC (1953)	$3,171
London (11,600)	$1,385
Seattle (480)	$1,418
Boston (844)	$1,265
Oklahoma City (30)	$1,066
Chicago (4,760)	$1,039
Milwaukee (80)	$833
Minneapolis (1,525)	$639
Boulder (250)	$636
Fort Worth (345)	$558
Aspen (100)	$456
Hamilton (750)	$177

Quartile 1

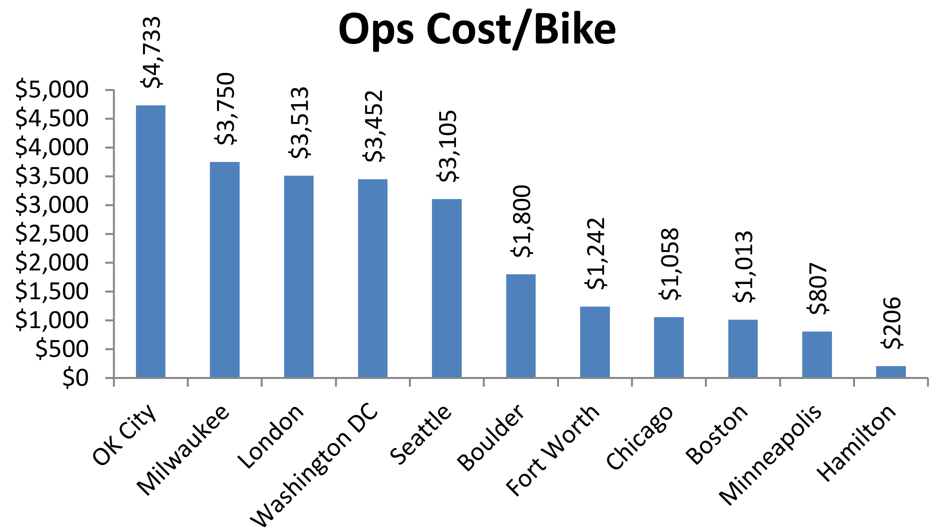
Quartile 2

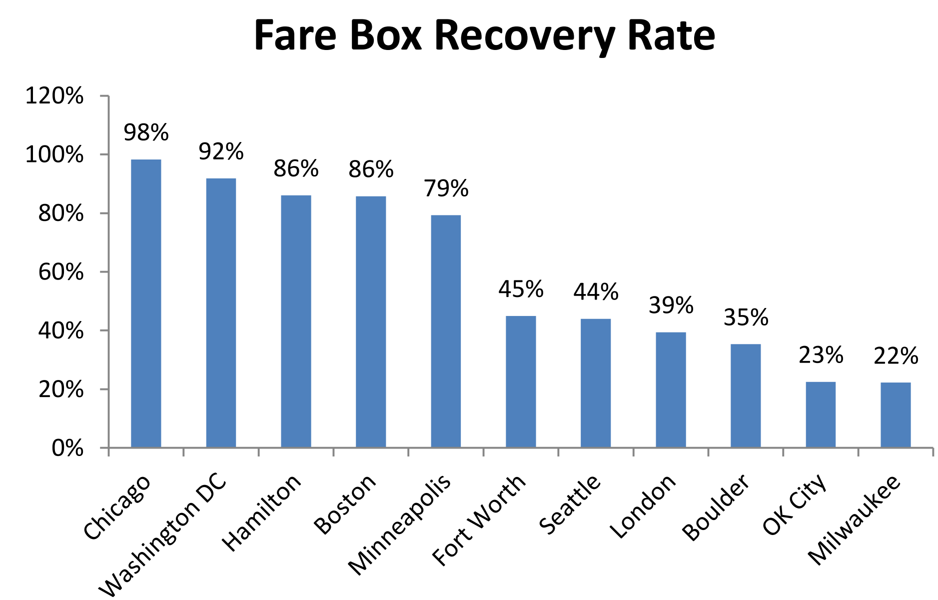
Quartile 3

Quartile 4

Operations Cost/ Recovery Rates

City	Ops Cost/Bike	System Revenue Per Bike	Fare Box Recovery Rate Per Bike
Chicago	$1,058	$1,040	98%
Wash DC	$3,452	$3,171	92%
Hamilton	$206	$177	86%
Boston	$1,013	$869	86%
Minneapolis	$807	$639	79%
Fort Worth	$1,242	$559	45%
Seattle	$3,105	$1,367	44%
London	$3,513	$1,386	39%
Boulder	$1,800	$636	35%
OK City	$4,733	$1,067	23%
Milwaukee	$3,750	$834	22%
Average	**$2,244**	**$1,179**	**88%**





Appendix

Price Changes

City	Have you changed any of the prices or products since launch? What changes did you make and why? How effective have the changes been?
Aspen	1. Removed **7-day pass**. Wasn't utilized. 2. Significantly increased season passes thru sponsorship partners. Employees get free passes. 3. Change overtime fee/**free period** from 15 to 30 minute increments. Much easier to describe. 4. Refined sign up process. Now can be done quick and by phone. Gets new riders into system. 5. Debuted Bike Shuttle Pass in 2015 with 6 hotel partners. Hotel gives branded pass RFID cards to guests upon check in. Pass includes 4 free rides, courtesy of the hotel, and then the rider pays $1/additional ride. 6. Event Passes remain important.
Boston	1. Increased **daily pass** $1 from $5 to $6. Does not seem to be a decrease in sales, but haven't analyzed. 2. Added **corporate membership** of $50 and lead to strong increase in sales.
Boulder, CO	1. Increased **daily pass** price from $5 in 2011 to current price of $8 2. Reduced free period/ **free period** for each trip from 60min to 30min 3. Added semester (150day) pass targeted at the University (of Colorado) population 4. Went year round in 2012 and 24/7 in 2014 Trips 5. Have increased from 18k in 2011 to 43k in 2014 (increase of 138%) System generated revenue increased from $74k in 2011 to $159k in 2014 (increase of 114%)
Chicago	1. Increase **daily pass** price from 7 to $9.95. We have seen reduced pass purchases on Sundays with no change on Saturdays. We've seen an overall increase in net revenue.
Fort Worth	1. Added **sales tax** to all but Annual Membership. Zero complaints.
London, United Kingdom	1. Jan 2013 - Doubled **annual membership** fee from £45 to £90 and **daily pass** from £1 to £2. Rationale was revised tariff was chosen as it optimised the loss of demand against an increase in revenue improving the financial sustainability of the scheme. Not such whether the effectiveness has been looked at. I would assume it has improved our revenue but many people stopped using the scheme or were increasingly negative towards the scheme as a result of the increases 2. Jan 2015 tariff/ **free period** change moved to £2 for every additional 30 mins after the free period. Rationale was simplifying the tariff change for customers by removing the uneven bandings of duration. Also strategically makes it easier to introduce further changes down the line such as charging for first 30mins and PAYG models ii. No impact on demand for the scheme, reduction in the number of calls to the CC.
Wash D.C.	We increased prices after 2 years. Roughly 14% on most **annual membership** fares.
Milwaukee	1. Eliminated **daily pass** because confusing. Now two options - month pass ($15/month) and pay-as-you-go pass ($3/30 min). Worked awesomely. Very few calls with pricing confusion.
Hamilton	1. Removed our Founding Membership (system was founded!) 2. Replaced Founding Membership with Power User membership/ **premium membership** at a lower rate. The Power User membership provides more daily ride time and is an annual membership ($125). The Founding Membership had included a special tshirt and the privilege to name a bike in our fleet. 3. Changed **out-of-hub fee** from $0 during a trial period to $1 for the option to lock out of hub (and a $0.67 credit to return out of hub bikes to a hub). By offering it for free for a time we were able to measure how often people were using it. Originally we were going to charge $3 for the option to lock out of hub. Our users were pleased with the reduced out of hub fee, and it is still helpful in generating revenue to cover our operational costs to recover out of hub bikes and return them to hubs.
Minneapolis	1. Changed from plus **sales tax** to tax included afer 1st year 2. Different **free period** for members vs casuals. Members get 60 minutes free, casuals 30 minutes. Made change beginning 2014. We did this in an effort to increase annual membership sales and convert users form casual use. This did not significantly change our annual membership sales or the average length of trips by our annual members 3. Added **30 day recurring membership**. We've had a 30 day membership in the past priced at $30 which we sold very few of. Our current 30-day membership is $15. This membership is set to renew the next time the user rents a bike after their initial 30 days has lapsed so users only pay if they use the system. This 30 day recurring membership was an attempt to appeal to users for whom the $65 for an annual membership was a barrier. We added a 30 day (casual) pass for sale at the station also priced at $15. Our expectation was that these would eventually convert to a 30 day recurring membership to get the longer ride time but that hasn't happened in any significant number. The 30 day pass has been more popular than the 30 day membership. 4. Reduced **corporate memberships** from $65 to $50 before the employer subsidy in 2015. We saw a very large increase in the number of employers in the program as well as the number of memberships sold, however the change in pricing was just one factor in the increased sales.

Equity

Highlighted Program – Philadelphia

Philadelphia's goal is to demonstrate an equitable, replicable model of bike share for the US. Programs are diverse but stress the following concepts 1) Eliminate barriers to entry where possible (allow cash payment, flexible payment, monthly rather than annual bills), 2) Partner with strong organizations to understand needs of lower income individuals, 3) market Indego in a way that makes sense Demonstrate through materials and marketing program the way that Indego is 'for you' to diverse populations - Listen first, learn first, act later

Highlighted Program – Boston

Boston provides $5 subsidized memberships to residents within 400% of the poverty line (this will change to 200% in 2015). To date the program has sold almost 2,000 memberships, which represents 18% of the Boston Hubway membership. The key to success has been creating a simple, straightforward program with 1) honor system eligibility, 2) people self-register online, 3) free helmet and helmet is mailed to their address 3) significant grassroots outreach to a high volume, more than 100 , partners.

The unbanked can come in directly to office. Only 9% of subsidized memberships are for the unbanked. 13 of 90 stations in very low income neighborhoods. 21 in neighborhoods with substantial low-income populations

Highlighted Program – Minneapolis

Nice Ride has an extensive program around equity & outreach. We have programs offering free yearly memberships to people in need. Some of these are neighborhood based and others are targeted at students through their college or university. … In addition to the standard bike share system we have piloted long term loan programs of non-bikeshare bikes in communities where the type of urban bike share system we provide in the rest of the city may not be the best fit. The programs work well in places where we can find good partner advocates. Finding champions for your project within the communities you're trying to serve seems to be essential to these programs. The metrics we're looking at are things like number of program participants, attendance at scheduled program events, rides by program participants etc. ..We've also done followup with focus groups and individual interviews.

Marketing

Other Intriguing Strategies	Description	City	Quotes
“Cross-Pollination” Events	Large events with like-minded demographic	Aspen	“Aspen held a Drive Less Campaign …and donated free 25 ride passes to anyone who pledged. We had a 50% redemption rate of these passes. … Very effective for conversion as already an audience interested in transit” - Aspen
Abutter Promotion	Outreaching neighbors	Washington DC	“Postcards sent to residents on postal routes near newly installed stations. Effective. “ – Washington DC
Unicorn Bike	Specially decorated bike added to fleet. Attracts social media.	Minneapolis, Boston	“…Our unicorn bike with the #gnarlyride hashtag was a very successful social media campaign. We see daily usage of the hashtag from people finding the bike and …engaging with the Nice Ride brand. - Minneapolis
Premium Membership	Extra benefits given with membership for additional fee	Seattle, Hamilton	“Our most effective marketing campaign was our Founding Membership drive that allowed someone to name a bike. That was effective for selling the memberships and continues to provide an engaging and fun way for riders to connect with us and give earned media. “ - Hamilton
Hotel Promotions	Hotel concierges as ambassadors	Aspen	“Hotel concierges have been important ambassadors” - Aspen
Technical Improvements	Hired staff, made coupons available online	Minneapolis	“We made the change from a physical coupon based system to a code-based online registration. This removed any delay in printing coupons, or having to constantly check with the businesses to see if they needed more coupons.
Great Service		Philadelphia	“Delivering … high quality customer service is key to maintaining members” - Philadelphia

Select Raw Data

Largest City/Town in System	Please confirm how you will fill out the form?	Launch Status	Which best describes your overall structure?	How many operatoinal months a year?	Who operates the system?
Aspen	My Municipality only	06/2013	Non-Profit (Non-profit owns and operates)	6	Self-Operated
Boston	My Municipality only	07/2011	Public (City owns/third party operates)	10	Motivate
Boulder, CO	Entire System	April 2010	Non-Profit (Non-profit owns and operates)	12	Bcycle
Buffalo New York	Entire System	2012	Non-Profit (Non-profit owns and operates)		Local Operator
Chicago	Entire System	June 2013	Public (City owns/third party operates)	12	Motivate
Detroit	Entire System	Planning Phase	Non-profit operated, but owned by city	~8 months	Have not yet selected a vendor
Fort Worth	Entire System	April 2013	Federally-funded, equipment owned by Transit Authority (grantee), non-profit operates	12	Local Operator
Hamilton	Entire System	03/2015	Public Owned/Non-profit operated	12	Local Operator
Honolulu	Entire System	To Launch 2015/2016	Non-Profit (Non-profit owns and operates)	12	Undecided
London, United Kingdom	Entire System	07/2010	Public (City owns/third party operates)	12	Serco
Los Angeles	My Municipality only	To Launch 2015/2016	City & Transit Authority own/third party operates	12	Bicycle Transit
MEMPHIS	Entire System	To Launch 2015/2016	Non-Profit (Non-profit owns and operates)	12	TBD
Milwaukee	Entire System	08/2014	Public non-profit partnership	12	Local Operator
Minneapolis	Entire System	06/2010	Non-Profit (Non-profit owns and operates)	7	Local Operator
New York City	Entire System	May / 2013	Private/For-Profit (For-profit owns and operates)	12	Motivate
Oklahoma City	Entire System	May 2012	Public (City owns/third party operates)	12	Bicycle Transit
Philadelphia, PA	Entire System	4-15	Public (City owns/third party operates)	12	Bicycle Transit
Portland	My Municipality only	To Launch 2015/2016	Public (City owns/third party operates)	365	Motivate
Seattle	Entire System	10/2014	Non-Profit owns/ 3rd party operates	12	Motivate
Washington, D.C.	Entire System	9/2010	Public (City owns/third party operates)	12	Motivate

Select Raw Data

Largest City/Town in System	Annual Members	Casual members	Equity	Monthly	ST Memberships
Aspen	465	2174	0	14	0
Boston	13,082	106,047		2,765	0
Boulder	1455	10094	600	0	0
Buffalo	100	200	0	0	0
Chicago	30300	475000	840	0	0
Fort Worth	339	18261	0	16	0
Hamilton	1077	5104	250	751	0
London	13194	1844753	0	0	0
Milwaukee	582	0	0	667	8610
Minneapolis	3566	86238	409	6654	0
Oklahoma City	6	4954	0	9	0
Seattle	2726	25323	0	0	0
Washington DC	33000	263296	5	2000	0

City	Days/ Yr	Year Definition	Stations (Begin)	Stations (Edn)	Station Avg	Bikes	Docks
Aspen	183	Calendar Year 2014	13	14	13.5	100	182
Boston	305		140	140	140	1306	2568
Boulder	365	Last 12 Months	22	38	30	250	500
Buffalo	365	Last 12 Months	15	15	15	75	0
Chicago	365	Last 12 Months	300	476	388	4760	8300
Fort Worth	365	Last 12 Months	35	43	39	345	595
Hamilton	365	FY2015	109	115	112	750	1300
London	365	FY Apr14-Mar15	735	735	735	11600	19863
Milwaukee	365	Last 12 Months	10	11	10.5	80	151
Minneapolis	213.5	Calendar Year 2014	170	170	170	1525	3000
Oklahoma City	365	Last 12 Months	7	8	7.5	30	142
Seattle	365		53	0	26.5	414	0
Washington DC	365	Last 12 Months	196	207	201.5	1953	3906

Select Raw Data

City	Total Trips	Trips by Annual Members (for year)	Trips by " Single Trip"	Trips by Casual	Trips by Monthly
Aspen	17,656	11,147	6,509	-	415
Boston	1,145,108	892,082	-	253,026	-
Boulder	43,143	23,728	-	19,414	-
Buffalo	5,000	3,000	2,000	-	-
Chicago	2,800,000	1,900,000	-	900,000	-
Fort Worth	40,146	10,537	-	29,409	200
Hamilton	138,196		-		-
London	10,082,233	5,384,764	-	4,697,469	-
Milwaukee	13,619	361	8,878	-	4,380
Minneapolis	408,503	150,738	-	201,274	56,453
Oklahoma City	7,180	-	-		-
Seattle	131,249	79,373	-	51,876	-
Washington DC	3,232,974	2,572,661	-	660,313	-

Select Raw Data

City	How much did you receive for each of the following last year? For any lump sum payments on multi-year contracts, please put in annualized amount. Title Sponsor, annualized (Primary sponsor, includes name. Ex; Citibike)	Lead Sponsor, annualized (Primary sponsor, does not include name)	Secondary Sponsor, annualized	Station Sponsor, per station annualized	Advertising Partner, annualized (Total system)	Other/Clarification	How many stations have a station sponsor?
Aspen	0	30000	25000	2000	0	Basket Sponsors, sold per season: $250 - $300 per basket. Map Panels on all system, sold per 2 weeks: $1,500 per week	16
Boston	307000	0	0	16,667	305000		30
Boulder, CO	65000	0	0	0	0	We seek 15% of overall operating revenue/costs from our Presenting sponsor and 15% from the City.	20
Buffalo New Yoork	0	0	0	0	0	We are currently in negotiations with Title Sponsor	0
Chicago	0	2400000	0	0	750000		0
Detroit	0	0	0	0	0		0
Fort Worth	0	0	0	10363.64	32212		22
Hamilton	0		0	3300	0	$25,000 from Union Gas to purchase 250 subsidized annual memberships	24
Honolulu	0	0	0	0	0		0
London, United Kingdom	7015440	0	0	0	0		0
Los Angeles	0	0	0	0	0		0
MEMPHIS	0	0	0	0	0		0
Milwaukee	0	0	261100	5000	0		9
Minneapolis	850000	150000	0	2500	0	Stations spronsors typically enter into a $10,000 annual contract for 4 stations	0
New York City	0	0	0	0	0		0
Oklahoma City	0	50000	0	0	0		1
Philadelphia, PA	1825000	0	95000	11,000	0		17
Portland	0	0	0	0	0		0
Seattle		500000	302300	12000	0	helemt sponsor, , listed as secondary	4
Washington, D.C.	0	0	0	0	0	Station sponsorships have ranged in price.	5

Select Raw Data

City	(If third party operator) How much did you pay last year total for operations? If non-profit) What were your total operating costs related to bike share. Please include all costs such as marketing, administration, helmets, spare parts. Please do not include costs for new stations. TOTAL COSTS	Your operators actual costs, if reported?
Aspen	-	0
Boston	1,415,000	In 2014, operating expenses per dock month were listed as $72.
Boulder, CO	450,000	0
Buffalo New Yoork	-	0
Chicago	5,035,000	0
Detroit	-	0
Fort Worth	428,588	0
Hamilton	154,502	151011
Honolulu	-	0
London, United Kingdom	40,750,498	35941113.51
Los Angeles	-	0
MEMPHIS	-	0
Milwaukee	300,000	125000
Minneapolis	1,230,000	0
New York City	-	0
Oklahoma City	142,000	142000
Philadelphia, PA	769,000	711000
Portland	-	0
Seattle	1,528,054	
Washington, D.C.	-	0

Select Raw Data - Conclusions

City	Best and Worst decision(s)	Changes want to see?	Important thing for others	What information from other cities would be useful to you?
1	Best Decisions: Adding stations in strategic locations that serve as important connections to other forms of transit, partnering with large events and having them offer WE-cycle bike share as one of their shuttle / transportation services and to promote, working closely and collaboratively with our manufacturer, being willing to be flexible and make adjustments to offerings. Worst Decision: Thinking that we could be financially sustainable through user generated fees and sponsorship revenue .	1. Continued integration with other modes of transit to provide seamless connectivity in the user experience and thereby reduce the barriers of entry. 2. Simplify the bike share concept to reduce confusion with pass periods and user fees which most likely means introducing different pricing models. 3. Cross-promotion between different programs to passholders so that when passholders travel they ride bike share in the place they are visiting, to this end, reciprocal pass offerings would make passholders very happy.	DIRECT TO BIKE PASS - Allowing our casual passholders to ride like annual/season passholders by providing them with RFID cards whenever possible. We have developed a very streamlined pass sign up process see www.ridewe.org/ridemore in which someone can receive an RFID card with a custom link to a custom sign up page and only have to complete a few fields to sign up rather than the lengthy passholder sign up process. Once they have completed sign up they enter the pass # from the back of their RFID card and the card self-activates and they are ready to ride... skip the kiosk and go straight to the dock. The URL we use can be easily customized. - We find that people are discouraged from riding if they have to wait in line at a kiosk to check out another bike. With the card, skip the kiosk and ride on! - This pass innovation is incredibly valuable for events as participants can receive sponsor branded cards in their welcome bags and activate them in the comfort of their own room and be riding as soon as the want to without waiting in a line to buy a pass. - We are committed to this innovation because it allows for custom experiences for sponsors for example as well as doesn't take too long. THE BIKE SHUTTLE PASS: A great way to partner with hotels and to get hotels to pay for rides upfront even if their guests don't use them. Furthermore, an excellent way to introduce new riders to bike share with a few free courtesy rides. See earlier description.	Would like the industry to have a standardized budget line items as to what is included in operating and what in G&A so that we can have better standardization in cost recovery and cost per ride.
2	Best Decisions 1. city owned 2. hort contract term to keep operator in check 3. rebid operating contract instead of renewing it, got excellent deal 4. subsidized member program		Prescribe a bike	Actual operating costs

Select Raw Data - Conclusions

City	Best and Worst decision(s)	Changes want to see?	Important thing for others	What information from other cities would be useful to you?
3	Best: 1. Going from a seasonal 9 month program and staying open 365/24/7. 2. Hiring full time marketing/communications manager and full time operations manager 3. Bringing all bike/station operations in house Accepting a $550k federal grant via City to expand system by 70% in 2014 Worst: Accepting the $550k federal grant without a plan to get the $110k local match!	1. I'd like to see our system continue to expand in size. 2. I want to see the software technology provided by our vendor keep pace with other innovative vendors. 3. I want to see the pass purchase and bike checkout process streamlined and capable of being performed by a mobile device at the bike. I'd like to see the hardware, equipment and software costs come down. 4. Motivation of vendors more aligned with those of operators. 5. Bike sharing to be officially viewed by federal funding agencies as transit.	Going from a seasonal 9 month program closing between 12pm - 5am to staying open 365/24/7.	How to incorporate bike sharing pass hardware/technology with other passes ie transit pass, student pass?
4	We have been operating for 4 years and the public wants a more robust system. We hope we can deliver one by 2016	In every community in Buffalo	We operated a car share and bike share system at the same time. We have done demonstration projects in multiple cities that are not traditional markets.	Operation general questions
5	Best: aggressively pursuing sponsorships Worst: not putting performance metrics (with consequences) in our contract with B-Cycle to account for system outages that are out of our control	Like to see bikeshare gain further recognition at all levels of government as a form of public transportation, whether its a tax subsidy for commuters or an operational subsidy for systems based on trips.	Formed a working partnership with our local transit authority.	Public and private funding sources, successful marketing practices
6	Best- 1. naming our bikes to create an engagement tool and personalize the system; 2. bringing McMaster University hubs onto campus (from perimeter); 3. hiring a good team of people excited about bike share! Worst-expanding service area early on and bending to political pressure.	1. Government subsidies for operating bike share systems, like what other transit systems have. 2. We would like to see the bike share industry actively fighting mandatory helmet laws. We are the #1 industry that should be encouraging improved infrastructure and emphasizing the need for greater number of cyclists as the primary determinant of reduced safety risks for cyclists. The problems with shared helmets are never going to have an easy solution and there is a risk that we will spend far too many resources pandering to that requirement when we could be focusing on increasing ridership- which is the best way to improve safety. 3. We'd also love to see a departure from dock-based systems in North America and a general move towards more dynamic systems that give users greater flexibility (i.e. smart-bike systems or other designs that may come along).	Successful large scale implementation of a smart-bike system.	How to best calculate staffing requirements? What is it based on (i.e. number of systems, number of rides, system area)? What is the impetus for changing staff hours or numbers? If we had aggregate data then it would help to plan based on system size.

Select Raw Data - Conclusions

City	Best and Worst decision(s)	Changes want to see?	Important thing for others	What information from other cities would be useful to you?
7		better walk-up customer intelligibility. Point of sale at bikes. Solution to dock blocking		
8	Worst was agreeing to small docking stations in boroughs. Time pressure and borough resistance acknowledged, but still a big mistake. Also going in with low pricing, which then becomes very hard to increase. One of the best is retaining ownership/responsibility for the scheme, including holding revenue risk, rather than franchising it out. Others might include not supplying locks on the bikes, not offering tariff discounts to attract business	Bikes must get cheaper to buy and maintain, along with street furniture. Also need to find a way to make using the bike far more intuitive (using colours to indicate shifter, brake bell, etc., ratcheted seat posts, and so on). Would also like to see integrated docking points allowing pedal or e-bikes to use the same bollard.	Recently it would be the App and Blaze	Any cost information is helpful, customer churn data, maintenance data
9		Full transit integration both at federal and regional level, interoperability with different vendors		
10				
11	Best decision: changing our pricing Worst decision:	More stable electrical equipment with better and more stable internet connectivity. Better mobile integration, more technological options.	Simplified pricing	How they handle the operations side of everything, any heuristics they use for rebalancing, standards and metrics they use.
12	Best: 1. We've simplified our fees from an escalating fee structure ($0, $1.50, $3, $6) to a flat rate of $3 per half hour after the initial free period. As a result we have fewer disputes about billing and happier customers. Casual sales are up with no loss in fee revenue. 2. This year we had a dedicated person on staff to pursue corporate membership sales. This resulted in the first major increase in annual membership sales in 4 years. 3. We also made significant software improvements to facilitate groups memberships. While numbers are way up with corporate sales, this hasn't held true for all programs using the new software. Worst: 1. We purchased and deployed a lot of equipment that was first of it's kind and wasn't ready to stand up to public use. this resulted in a lot of technical and other issues that made for bad customer experiences. 2. In the past two years we've made a very big push to promote membership and put keys in people's pockets. We've given away or sold at greatly reduced price almost 5,000 monthly memberships but this had resulted in few long term repeat users with 85% or more of accounts inactive after the initial month or two.	New forms of payment and authentication for example Apple Pay/Android Pay. Contactless payments and/or unlocking via mobile phone. Integration with other transit providers like bus, train and car or ride share. Referral sales through aggregator apps or other transportation providers. Single sign-on for user authentication so that users don't need to be members / account holders with multiple transportation providers. Better, more efficient bike redistribution tools and methodologies. Better system reliability measurement - in other words better ability to measure our ability to supply bikes and open dock points to our users. Improved next generation bicycles. Simplified, quicker user experience for both casuals and members. Pricing structure that is easier to understand and competitive with other modes of transit but preserves current revenue.	This past season we implemented an incentive compensation program based on system reliability. We're paying our rebalancing staff more for delivering greater reliability to our customers.	I collect job postings form other cities for any bikeshare related positions. I'd like to know more about what systems look for in terms of staffing and qualifications to aid in our own hiring. This could be position profiles, org charts etc.

Select Raw Data - Conclusions

City	Best and Worst decision(s)	Changes want to see?	Important thing for others	What information from other cities would be useful to you?
13				
14	Best decisions: hiring Bicycle Transit Systems for operations, rebranding Spokies, plan for new equipment. No bad decisions.	We'd like to change our system and expand it. We'd like to revise our pricing structure. We'd like to see system compatibility among vendors. Software compatibility among vendors. Options for electric-assisted bikes. Better solar capabilities. Trikes. Child-size bikes. More helmet vending options. Multi-modal RFID capabilities.	Rebranding - complete refurbish and rebranding bikes, stations and website.	Marketing and sponsorship best practices. Membership drive best practices.
15	Best! - Do a focus group to inform pricing decisions - Hire a sponsorship broker - do full on 'retail' push in station planning - become members of NABSA, listen to our peers - Pick Bike Transit Systems & B-Cycle Worst! - Missed opportunity to provide good 'how to' information on kiosks prior to launch	For Indego - Improve system robustness with better balancing, station redundancy etc. - Grow in service area, trips per bike etc. - Provide different membership options at kiosk (multiple options purchased at kiosk) - Investigate different payment schemes, look into providing member credit for customers, gift certificates, etc. - Develop web store for things like swag, helmets, gift certificates, etc. For bike share - Develop a bike or system that works equally well when station-based or non station based - Understand full potential for sponsorship, help 'bike people' properly align incentives with 'business people' - Define bike share as Transit in legislation - Investigate e-bikes, determine how or if to incorporate them into existing systems, into city traffic - Develop stable business models that fully fund operations and provide for system replacement and expansion	We've developed a pricing structure that is easy to understand and non-threatening and developed a way for anyone to purchase a membership using cash at common retail outlets.	Would like to learn more about making bike share integral transportation in communities of color.
16	Best: go with SoBi Worst: State in grant applications that we have a private match before the agreement was sent.	More stability with equipment providers. Universal specs that allow cities and system owners to measure success by. Standards with third party vetting (e.g., station placement). Better planning by system owners on equipment replacement. The unicorn: fare integration/reciprocity w/ transit. A lot more funding dedicated to the service by local, state and federal government.	All theoretical until we get our asses launched! -Reducing our motorized rebalancing fleet by 75% through smart bike system architecture, pricing, gamification and bike trailers. Adding an additional 150 bikes to our fleet by utilizing our existing bike parking corrals as auxillary stations (hybrid of bike share and private bike parking). -Billing and marketing our annual pass solely as a 12 month contract, making it more attractive and accessible to more people. - Selling the annual membership at what we see as its true value (~$150) and utilizing the monthly billing (since that's how we all budget) to provide people a more apples-to-apples comparison.	

Select Raw Data - Conclusions

City	Best and Worst decision(s)	Changes want to see?	Important thing for others	What information from other cities would be useful to you?
17	Our overall business model is a struggle. We currently have a non-profit that contracts with Motivate. We are a less dense city, our system is 50 stations, we don't allow advertising and the city seeks a system that has no ongoing operating costs, ie financially sustainable. Due to our limitations, we recover less than 50% of ops costs. Our operations fee is quite high, $125/dock month. The city is trying to expand to 250 stations and add electric which could help, but there is still a reluctance to commit to ongoing operations costs. I guess I would like to see how it might be possible to reduce operating costs and maintain service levels, if possible. Launching in October -very costly. Launching with unproven equipment with suboptimal design requiring retrofits.	Increase revenue, add stations. I would like to see Citys adopt bike share as real public transportation, which means a commitment to ongoing funding. Sometimes I wonder if the early excitement about systems being "free" to the city's is haunting us a bit now. If we truly want to expand into ever less dense areas of the city, which is essential up to a point for a public transportation system, perhaps this requirement of no city funding is limiting. Launnching e-bike system	Our helmet system is an excellent model. Helmets available at every station. At first we just had bins on an honor system. And it worked! We recently added locks so we can charge, and this still works. The relatively low-tech solution is sufficient and people do not in fact seem disinclined to wear "used" helmets since we clean them.	operating fees