

HONOLULU BIKESHARE REPORT

Bikeshare Hawaii: Biki Pilot Phase through January 2020



Figure 1: Biki Street Art Tours, Shaka Guide



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Prepared September 2020

BIKESHARE HAWAII'S MISSION & VISION

Bikeshare Hawaii is a **501(c)(3)** non-profit organization that oversees the bikeshare contract providing an automated, 24/7 public bikesharing system in Honolulu known as 'Biki.' In 2019, the system included up to 1288 bicycles and 136 stations located in the urban core of Honolulu from Iwilei to the slopes of Diamond Head and from Manoa to Waikiki.



MISSION

Bikeshare Hawaii's mission is to provide the public with high quality, convenient, reliable, and affordable bikeshare services that enhance community health and livability, strengthen our public transportation system, and connect people to more places where they live, work and play throughout Hawaii nei.

VISION

Biki is a world-class bicycle transit system, is well-utilized and fun, and helps meet Hawaii's local community and visitor mobility needs. Bikeshare makes it easier to affordably and safely navigate our neighborhoods, unlocking myriad health, economic, and environmental benefits for the broader community, including:

- Providing an affordable, convenient, fun and flexible transportation option for residents and visitors
- Making the mental and physical health benefits of active transportation more accessible
- Putting more people on bikes, calming traffic and increasing traffic safety for pedestrians, motorists and cyclists
- Stimulating the local economy at the street level
- Connecting users to other forms of public transportation such as TheBus and soon, the 'Rail', both day and night
- Creating new jobs
- Reducing the use of fossil fuels and their air pollution
- Increasing access to neighborhoods where concerns about a lack of parking has reduced resident visits
- Reducing parking, gas and other personal car expenses
- Enabling users to enjoy the benefits of having a bike without the hassle of ownership or the worry about theft





BOARD OF DIRECTORS

Chair: Greg Gaug

Ulupono Initiative
Senior Vice President of Investments & Analytics

Bruce Coppa

Capitol Consultants of Hawaii
President

Rick Egged

Waikiki Improvement Association
President

Josh Feldman

Tori Richard Ltd.
President / CEO

Marcy Fleming

Kamehameha Schools
Director of Transactions

Danielle J. Harris

Elemental Exclerator
Director of Innovation, Mobility

Randolph Moore

University of Hawaii
Regent

Michael Robinson

Hawaii Pacific Health
Vice President of Government Relations & Community Affairs



Photo Credit: Fidel Hart, Biki Rider

EXECUTIVE DIRECTOR'S LETTER

Aloha Biki ohana and supporters,

Over seven years ago, our island started down this route to bring bikeshare to Honolulu with a broad-based group of community and government representatives who saw the missing opportunity that Honolulu could be for year-round cycling. Shared bicycles were the change needed to provide dependable bike transport for riders who simply wanted to ride bikes and not think about fixing a flat tire, oiling a chain or bike theft.



Since then, Biki's progress has evolved into a new Private Public Partnership (P3) which de-risked the startup phase that relied on the close cooperation with Secure Bike Share (operator), the City and County of Honolulu's Department of Transportation Services, the State of Hawaii's Department of Health, Hawaii Bicycling League, and many other community organizations. Both the Mayor and City Council have continued to promote a healthier Honolulu through improving the safety of our streets for cyclists. In 2019, Biki added almost 1.38 million bicycle trips to these streets, many of which were once car trips!

As key indicators of Biki's contribution to the community's increased health, we can refer to the cycling activities of our monthly members. Our kamaaina members took over 64% of all Biki trips in 2019. The majority of these residents reported that Biki allowed them to exercise more, which led to weight loss. The average cost for a Biki ride was less than 70 cents per trip for members with Commuter plans (2019). This monthly membership option provides for an unlimited number of rides under 30 minutes and costs about the same as a single plate lunch.

The past year brought new records to bikeshare in Honolulu, along with challenges common in our service industry. Seeing the national growth in micro-mobility, including electric scooters, legislation was passed creating fees and regulations to manage and safely enable new profit-based shared micro-mobility services in Honolulu. Biki is now grandfathered in to City Ordinance 19-29 under its existing service agreement.

Our bikeshare pilot program is a success given its ridership growth, significant leverage of private funds and proven benefits to the community!

Mahalo for your continued patronage of Biki and your vocal support for Bikeshare Hawaii.

Todd Boulanger
Executive Director



LOOKING BACK: HOW DID WE GET TO BIKI?

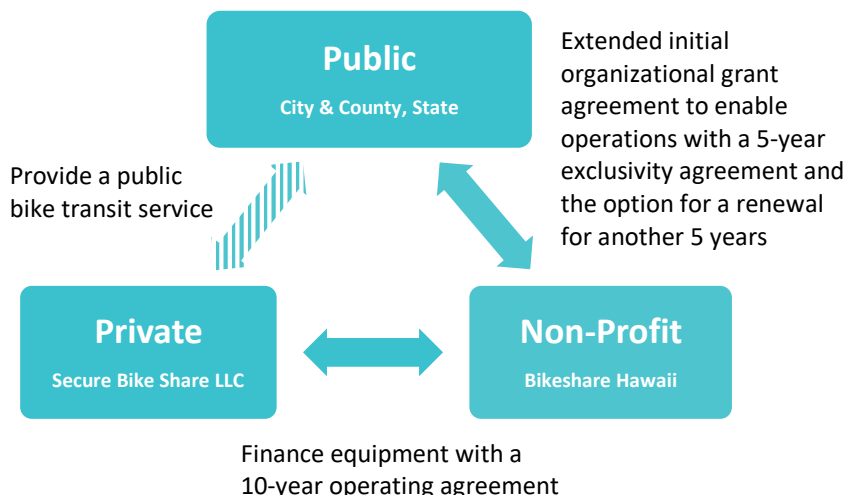
- 2007 — Paris launches Velib, the first ‘modern’ large public bikeshare system. The first known system, “White Bikes,” launched in 1965 in Amsterdam.
- 2008 — Washington DC starts the first modern bikeshare system in the US. Other cities follow including Nice Ride (MN, 2010), B-Cycle (CO, 2010) and Citibike (NY, 2013).
- LAYING THE FOUNDATION**
- 2008 – 2014 — Bikeshare makes its way to Hawaii! The State Department of Health funds Hawaii B-Cycle in Kailua as a pilot project on Oahu (2011 - 2014). B-Cycle offers two stations and 12 bikes for riders 18 and older.
- 2009 — The State requires all jurisdictions in Hawaii to adopt a Complete Streets policy.
- 2011 — The Hawaii Clean Energy Initiative working group is formed. The State Department of Health identifies bikeshare in Urban Honolulu as a strategy to decrease vehicle miles traveled.
- 2012 — The Bikeshare Working Group is formed to develop a bikeshare program for Hawaii. Representation from the City and County of Honolulu, State of Hawaii, Environmental Protection Agency, Hawaii Bicycling League, Ulupono Initiative, University of Hawaii, etc.
- 2013 – 2014 — C&C DPP completes the Honolulu Bikeshare Organizational Study recommending that Honolulu set up an administrative non-profit to run the City’s future bikeshare program.
- 2014 — The South King Street Protected Bikeway is completed.
- The City Council approves Resolution 14-35 in support of bikeshare as a public-private-non-profit model.
- **Bikeshare Hawaii is established as a 501(c)(3) non-profit.**
- OPERATIONALIZING BIKESHARE HAWAII**
- 2014 – 2015 — Bikeshare Hawaii is organized, a board of directors is formed and executive leadership is hired.
- 2015 – 2016 — US Environmental Protection Agency funds a Bikeshare Planning Study for station planning with the Department of Transportation Services as the technical lead.
- 2015 – 2017 — Bikeshare Hawaii engages the community in its design process, puts out a RFP for an operator with technology and equipment selection, and raises initial project planning funding from sponsors.
- 2016 — Bikeshare Hawaii receives four complete proposals and selects Secure Bike Share as equipment supplier and operator, Secure finances the initial \$4.5 million in equipment and startup costs.
- 2017 — The South Street Protected Bikeway is completed.
- **Biki launches Phase 1 in June: 1,000 bikes and 100 stations.**
- 2018 — 1 MILLION BIKI RIDES! Also, Biki is named the sixth most used bikeshare system in the nation by NACTO.
- Lime suspends service after one week in Honolulu, as many of its scooters were impounded by the City.
- Local, for-profit organization, Ride Sharee, launches dockless program with ~250 bikes.
- Biki expands to 1,288 bikes and 136 stations after eight months of community outreach. This is funded by TAP and matching funds and increases the service area to Diamond Head, Manoa, Makiki, and Iwilei.
- 2019 — 2 MILLION BIKI RIDES!
- Biki launches a low-income fare and initiates its first fare increase (limited to visitor-focused rates).
- State Act 134 (2019) is signed into law requiring state and all county transportation departments to adopt a Vision Zero policy.
- City Ordinance 19-29 is signed into law allowing businesses the opportunity to manage new forms of shared micro-mobility vehicles, helping to reduce our reliance on fossil-fuel based vehicles on Oahu.

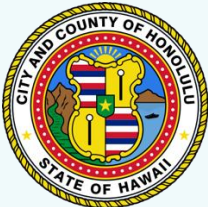


BIKI IS A P3: PUBLIC & PRIVATE & NON-PROFIT PARTNERSHIP

BIKESHARE IN HONOLULU: A UNIQUE ORGANIZATIONAL MODEL

Biki is a P3 relationship managed by an administrative non-profit. This structure was strongly recommended by the City’s 2014 Honolulu Bikeshare Organizational Study, though it is rare in the US for larger systems, as most are either fully public or privately owned.

A P3 was identified as the best path forward to quickly establish and test if bikeshare would work as a shared mobility service in Honolulu and later potentially statewide.



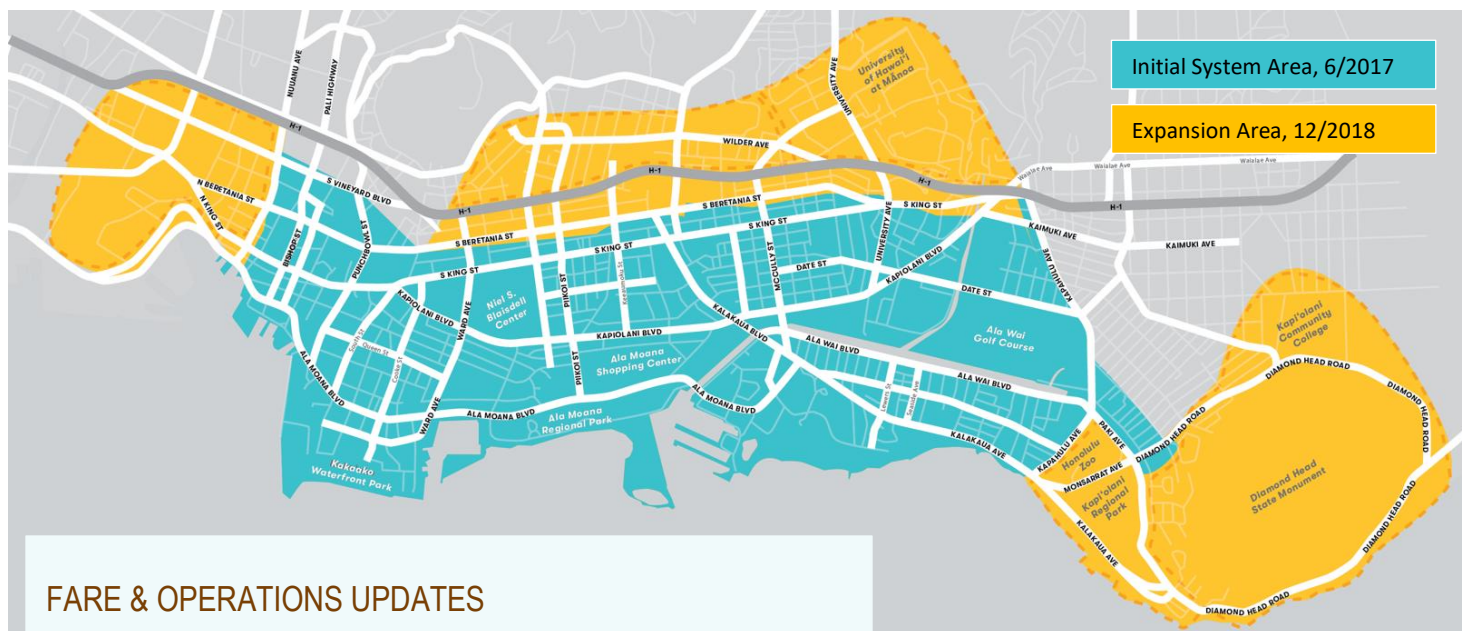
		
<p align="center">PUBLIC</p> <p align="center">City and County of Honolulu</p> <p align="center">Client and Partner</p>	<p align="center">NON-PROFIT</p> <p align="center">Bikeshare Hawaii</p> <p align="center">Contract Holder</p>	<p align="center">PRIVATE</p> <p align="center">Secure Bike Share LLC</p> <p align="center">Operator and System Co-Owner</p>
<p>The City and County of Honolulu provides the overarching vision for improved mobility of its citizen and visitor populations.</p> <p>The City owns approximately a third of the system equipment, purchased via FHWA’s Transportation Alternatives Program (TAP) grant with a cash match provided by Bikeshare Hawaii.</p> <p>The City also hosts the majority of the Biki bikeshare docking stations, issues street use permits after a traffic engineering review, and provides technical support for federal and state grants.</p>	<p>Bikeshare Hawaii holds a contract with each partner and leads the planning for the development of bikeshare with the community during the pilot period. This included facilitating all public dialogue to select the system hardware, docked vs. dockless operations, station locations, branding, and developing the Biki mobile applications (the Biki App).</p> <p>The involvement of a non-profit opened up the opportunity for businesses and foundations to sponsor and donate resources to complete the mission of bringing bikeshare to Honolulu.</p>	<p>Secure provides the operations, customer support and system billing that keeps over 100,000 bikeshare trips moving across Honolulu each month.</p> <p>Secure provided the initial investment and technical capacity to ‘de-risk’ the establishment of one of the largest North American bikeshare services west of the Rocky Mountains.</p> <p>PBSC Urban Solutions is a minority partner with Secure and provides technical resources related to the system hardware and back-end software.</p>

HONOLULU BIKESHARE SUCCESSES FOR 2019

SYSTEM EXPANSION

Biki grew in 2019 with more stations, bikes, customers, and new districts as it successfully implemented the first system expansion.

- The Biki fleet grew from 1,000 bikes to 1,288 bikes
- The Biki service network grew from 100 stations to 136 stations
- Total trips-to-date milestone went from over one million rides to almost three million rides
- Service spread into new neighborhoods: Iwilei, Makiki, Manoa, and Diamond Head
- New stations drew the University of Hawaii at Manoa and Kapiolani Community College communities directly into the bikeshare network
- Expansion added value for local companies/private property owners to host on-site Biki Stops, such as HSMA, Alexander & Baldwin, Kamehameha Schools, Castle & Cooke, Greystar, Victoria Ward, etc.
- The Phase 2 expansion's 20% 'local match' for TAP was funded through individual and business donations



FARE & OPERATIONS UPDATES

- In August 2019, Biki implemented its first change in fare structure, and updated its membership plan names
- Customer terms and conditions were revised, based on lessons learned from the previous two years
- All 136 station kiosks were updated to include more safety and enrollment information in both English and Japanese
- Additional languages were added to kiosk screens to reflect the diversity of our island, which is especially important given Waikiki's tourist economy
- The system's backend software underwent its first comprehensive overhaul since its 2017 launch



Figure 2: Biki Station at Hale Mahana Student Apartments

DEEPENED EXPERIMENTATION & REFINEMENT

- Biki initiated a \$10 monthly plan and a cash payment pilot effort to evaluate if monthly membership fees and/or banking were barriers to greater service adoption
- The Biki mobile app tested innovative features that included offering customer discounts by supporting merchants with optional route-finding prompts that direct riders from Biki Stops to their establishments
- Biki continues to seek opportunities to improve access and services, including evaluating new technologies and product offerings

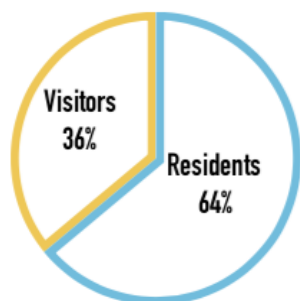


Figure 3: Biki Members unlocking bikes with ease using the Biki Mobile App

BIKI BIKESHARE RIDERSHIP DATA 2019

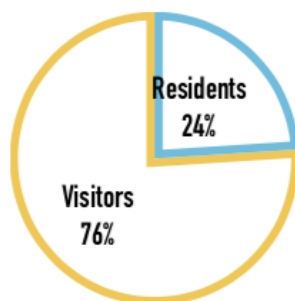
1.37 million rides

24% increase from 2018
Over 3 million rides to date



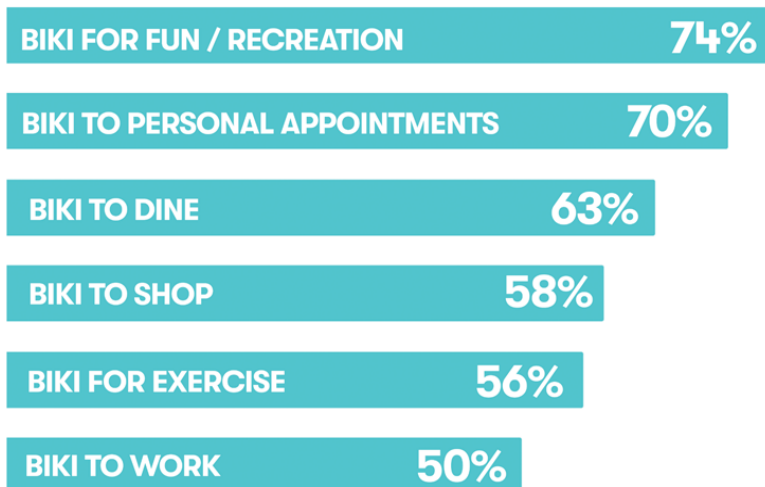
121,270 unique riders

17% increase from 2018



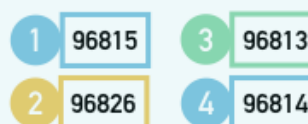
Oahu residents make up 24% of riders, but take 64% of all trips. 63% of all system revenue comes from casual “walk-up” users.

PURPOSE OF BIKI TRIPS:

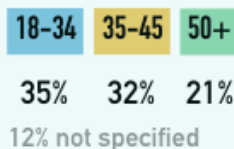


MEMBER DEMOGRAPHICS

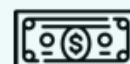
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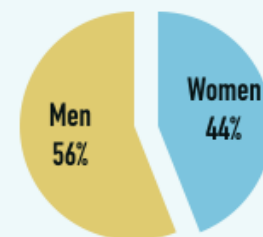
Age



Household Income



Gender



34% of US bikeshare users are female.

Source: Biki Member Survey, May 2018



Busiest Month: July
Busiest Day: Friday
Busiest Time: 4-5 PM
Record Day: 4993
Monday, December 9

BENEFITS OF BIKI BIKESHARE

CLIMATE IMPACT: REDUCING VEHICLE MILES TRAVELED

3.3 million pounds of CO₂
emissions avoided by Biki'ing instead of driving in 2019

Equivalent to...



323 passenger vehicles driven for one year



168,432 gallons of gasoline consumed



173 homes' electricity use for one year



2.7 million miles
traveled by Biki riders in 2019

Source: <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>

Since joining Biki, members reported driving or carpooling less



Used Biki to connect to TheBus



Reduced the number of vehicles in their household



HEALTH IMPACT: LOW-IMPACT CARDIOVASCULAR EXERCISE THAT BENEFITS THE BODY & MIND

22 million minutes
spent riding a Biki bike in 2019

Exercise more often



Reported losing weight



110 million calories
burned riding Biki in 2019

70% of Biki members do not consider themselves to be "cyclists".

ECONOMIC IMPACT: SAVING RIDERS MONEY & STIMULATING THE LOCAL ECONOMY

\$900 per year
average savings reported by Biki Members

Reported saving money



Discovered or visited a new business



(Bar Graphs) Source: Biki Member Survey, May 2018

On an average day in low-density areas like Makiki, one parking stall will see more than **6x more Biki users than drivers.**



13
Biki riders docking their bikes

vs.



2
Drivers parking their vehicles

In high-density areas like Waikiki, one parking stall will see more than **9x more Biki users than drivers.**



77
Biki riders docking their bikes

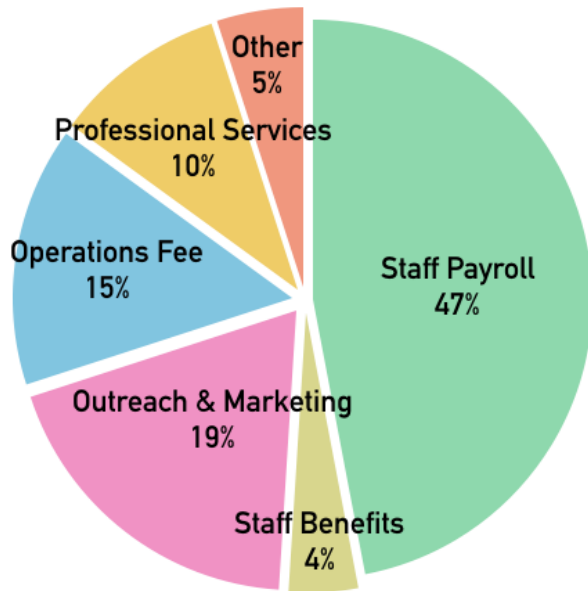
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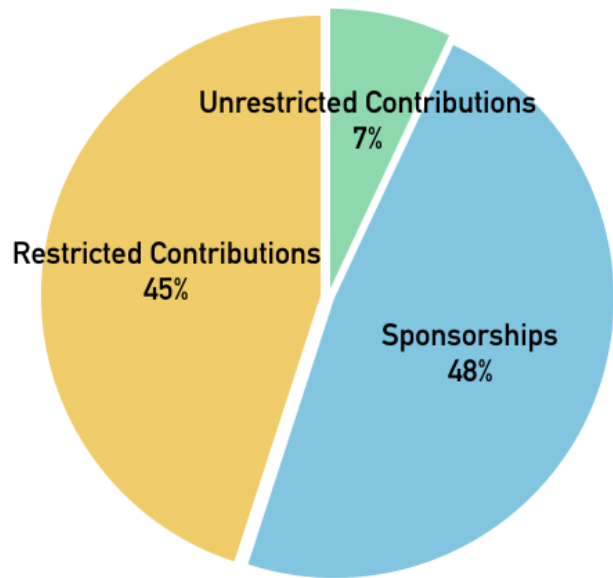
8
Drivers parking their cars

2019 FINANCIAL SUMMARY – BIKESHARE HAWAII

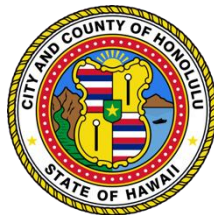
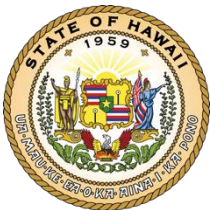
OPERATING EXPENSES



INCOME / FUNDING



MAHALO NUI LOA TO OUR PARTNERS AND SUPPORTERS



BIKI OHANA HUI – MEMBER TESTIMONIALS

Biki is doing bikeshare the right way. Using docking stations, Biki has kept the City from having to deal with bicycles littered about, as is the case with dockless systems I've seen on the mainland; what a mess. Biki adds value to our community and saves the City money with their well-run system. Go Biki! - Daniel D.

[Biki] does not take away from parking, it creates more by taking cars off the road. The world is changing. [We cannot be] stuck in the past and unable to recognize the changes we need to make when it comes to cars being the default mode of transport. - Jon F.



We have been coming to Honolulu for seven years. Each year we see Waikiki improve. This new initiative, Biki is an awesome way to travel and see the best of Waikiki. So easy to use and with so many locations it really is the best alternative. - Tony M.

One very important benefit I've noticed from Biki is that motor vehicle drivers in general have had to become better, more attentive, and more considerate drivers when sharing the PUBLIC roads with bicycles, due to the great popularity of the Biki bikes. - Jonathan L.

My husband and I both use Biki on a daily basis for our commutes and many travel needs around the city. Daily, Biki continues to grow its membership as more and more people become introduced to the ease and convenience of these services. More people riding means less traffic congestion, less competition for parking, healthier citizens, and a safer city. - Lisa B.

Imagine if Biki only serviced Waikiki and was nothing but a tourist amenity - that is what bikeshare would look like if it were just a business. - Chad T.

I bike to work now because Biki made it easy. Bikeshare made it so convenient that I no longer had an excuse to be one more car on the road. - Michelle M.



REPORT ADDENDUM: SHARED MICRO-MOBILITY WITH COVID-19 IN HONOLULU

COVID-19 WORLD PANDEMIC

The Honolulu Bikeshare Report on the status of Honolulu’s Biki Pilot project was written before the true effect of the COVID-19 pandemic on the Hawaiian Islands was well understood. This addendum has been added to reflect on how the system has been tested and the state of the market has changed due to the COVID-19 pandemic.

SHARED MICRO-MOBILITY INDUSTRY ACROSS THE US

COVID-19 was the market dynamic never expected by the Shared Micro-Mobility industry. Initially, some systems like Citi Bike (NY) saw rapid growth in ridership as commuters shifted from enclosed transit to socially distant options like bikes for essential trips. Most markets just fell into closure, including Bird and Lime and major dockless bikeshare operators, while many seasonal docked bikeshare systems postponed their spring reopening.

BIKI BIKESHARE AND HONOLULU

Honolulu did not escape the pandemic, even with its geographic isolation. The necessary closure of non-essential services such as bars, hotels and businesses resulted in empty streets and few commuters. The City declared Biki as an ‘essential’ service during the mandatory quarantine, so Biki continued to provide full 24/7 service while shifting resources from rebalancing to sanitizing equipment. The tourism travel ban and resident quarantine removed two of the three major pillars of Biki’s main user base and income: visitors and daily commuters. Based on early data, April was the worst month on record with a 68% decrease in rides from April 2019 (see below for more details). Since then, ridership and income have slowly increased but ridership is still 50% lower than a year ago. This pandemic has made it apparent that a core of our existing ridership relies on bikeshare as an affordable and essential means of transportation and exercise.



CALL TO ACTION FOR THE FUTURE OF BIKI AND BIKESHARE IN HONOLULU

The long-term effects of COVID-19 on ridership and income is not sustainable financially for Biki [and bikeshare] to fulfill its mission set forth by the City in the *Honolulu Bikeshare Organizational Study – Final Report (2014)*. In addition to experiencing the worst consecutive months of revenue, there is strong doubt as to the ability of our philanthropic supporters to continue providing financial support in 2021 or find new sponsors.

APRIL 2019	APRIL 2020
118,016 Total Rides	38,165 Total Rides
69% of rides taken by Biki Members	82% of rides taken by Biki Members

Honolulu’s bikeshare system will need support from elsewhere if it is to continue to successfully deliver significant health, economic and environmental benefits to Oahu residents and visitors. Otherwise, the outlook remains bleak and the system may be forced to either shut down or prioritize profits over community service and benefits.

At this point the City seems best positioned to ensure such services and benefits continue to improve for years to come.