A stylized bicycle icon in blue and black, positioned to the left of the main text. It features a blue frame, black wheels, and a black seat.

BOULDER BIKE SHARING

2018 ANNUAL REPORT

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MISSION:

To implement and operate a community-supported bike-share program that provides Boulder's residents, commuters and visitors with an environmentally friendly, financially sustainable, and affordable transportation option that's ideal for short trips resulting in fewer vehicle miles traveled, less pollution and congestion, more personal mobility and better health and wellness.

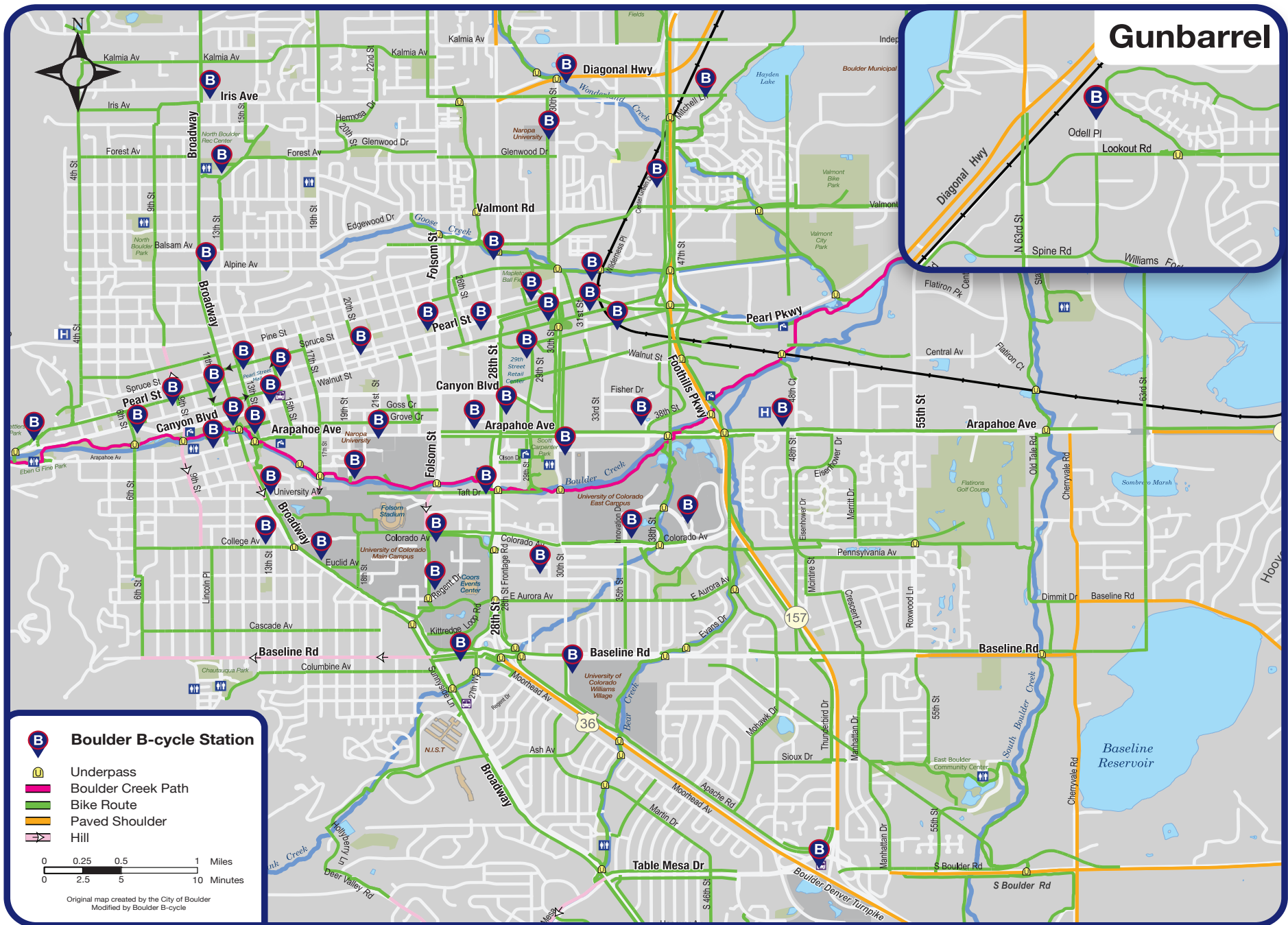
VISION:

A viable, sustainable bike-share system that serves and benefits all reaches of the Boulder community.

GOALS:

- Provide Boulder's residents, commuters and visitors with a transportation option that's green, convenient and affordable—and that utilizes and enhances Boulder's existing transportation infrastructure.
- Encourage more people in Boulder to ride a bike—or to bike more often—to promote their personal health as well as our community's quality of life.
- Make our community healthier, stronger, friendlier, more mobile and more vital.
- Be a financially sustainable operation that contributes to an environmentally sustainable community.
- Show how the application of new technology (wireless networks, RFID, GPS, mobile applications) can enhance simple, time-tested technology (bicycles).
- Nurture and promote Boulder B-cycle as a unique community initiative, so the system becomes a beloved Boulder institution—and so people can't imagine the days before bike sharing in Boulder!

SYSTEM MAP AS OF 12/31/18



2018 PASS OFFERINGS

30
MIN
TRIPS



DAY TRIPPER \$8/24 hours

Purchase at any B-station, in the BCycle app, or at boulderbcycle.org

Just visiting?
It's the best way to see Boulder.

30
MIN
TRIPS



PEOPLE'S PEDALER \$11 monthly

Purchase in the BCycle app or at boulderbcycle.org

It's like Netflix.
For bikes.

Adam M.—Member since 2011

60
MIN
TRIPS



REPUBLIC RIDER \$88 annually

Purchase in the BCycle app at boulderbcycle.org

Business Savvy?
Get the most for your money.

Margie T.—Member since 2015

PAY
PER
TRIP



CASUAL CRUISER \$0 to join

Purchase in the BCycle app or at boulderbcycle.org

For the free spirits:
only pay for what you use.

Jeff P.—Member since 2011

2018 At A GLANCE—OUR IMPACT



108,274 *TRIPS TAKEN*

PASSES REGISTERED

2,823

REPUBLIC RIDER
(ANNUAL)

1,316

PEOPLE'S PEDALER
(MONTHLY)

1,869

CASUAL CRUISER
(PAY-PER-TRIP)

11,352

DAY TRIPPER
(24-HOUR)

279,340
MILES
RIDDEN

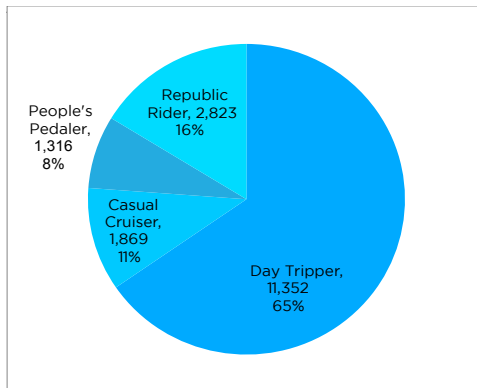
264,614
POUNDS OF
CARBON
EMISSIONS
SPARED

11.1 MILLION
CALORIES
BURNED

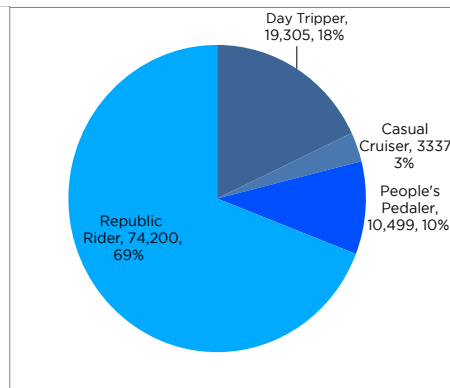
TRIP STATISTICS:

Boulder B-cycle riders took a total of **108,274** trips in 2018, an increase of **4.5%** over 2017. The system's use by annual members increased, while trips from 24-hour pass riders decreased, which is consistent with Boulder's slight decline in visitors. The single-greatest day of system use was on June 29th, when riders took 672 trips, and throughout 2018 every one of the system's bikes in service averaged more than one daily trip.

Types of Passes Purchased



Trips by Pass Type



- A peak of **672** trips on **6/29/18**
- An average of **297** trips per day

USAGE PATTERNS

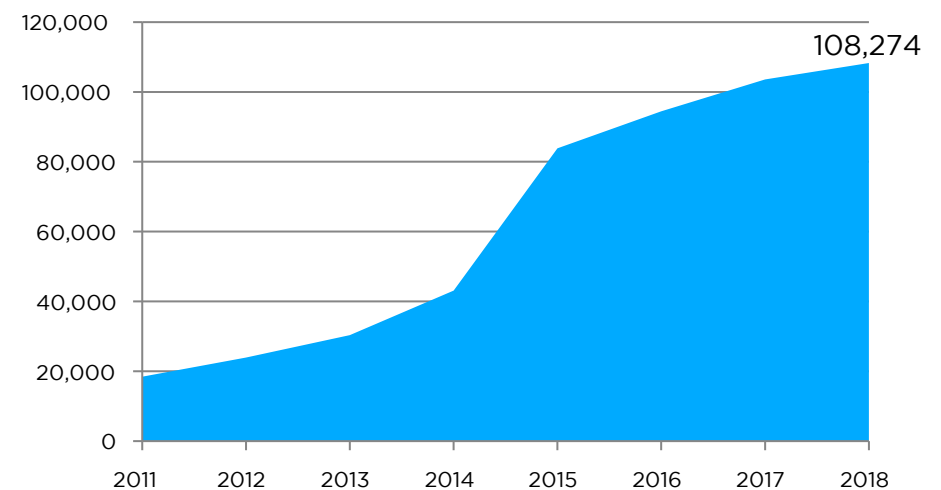
On weekdays, rush hour and lunchtime peak use periods carried over from 2017, though the most popular station-to-station routes changed significantly.

The most popular station to station routes ridden in 2018 were as follows:

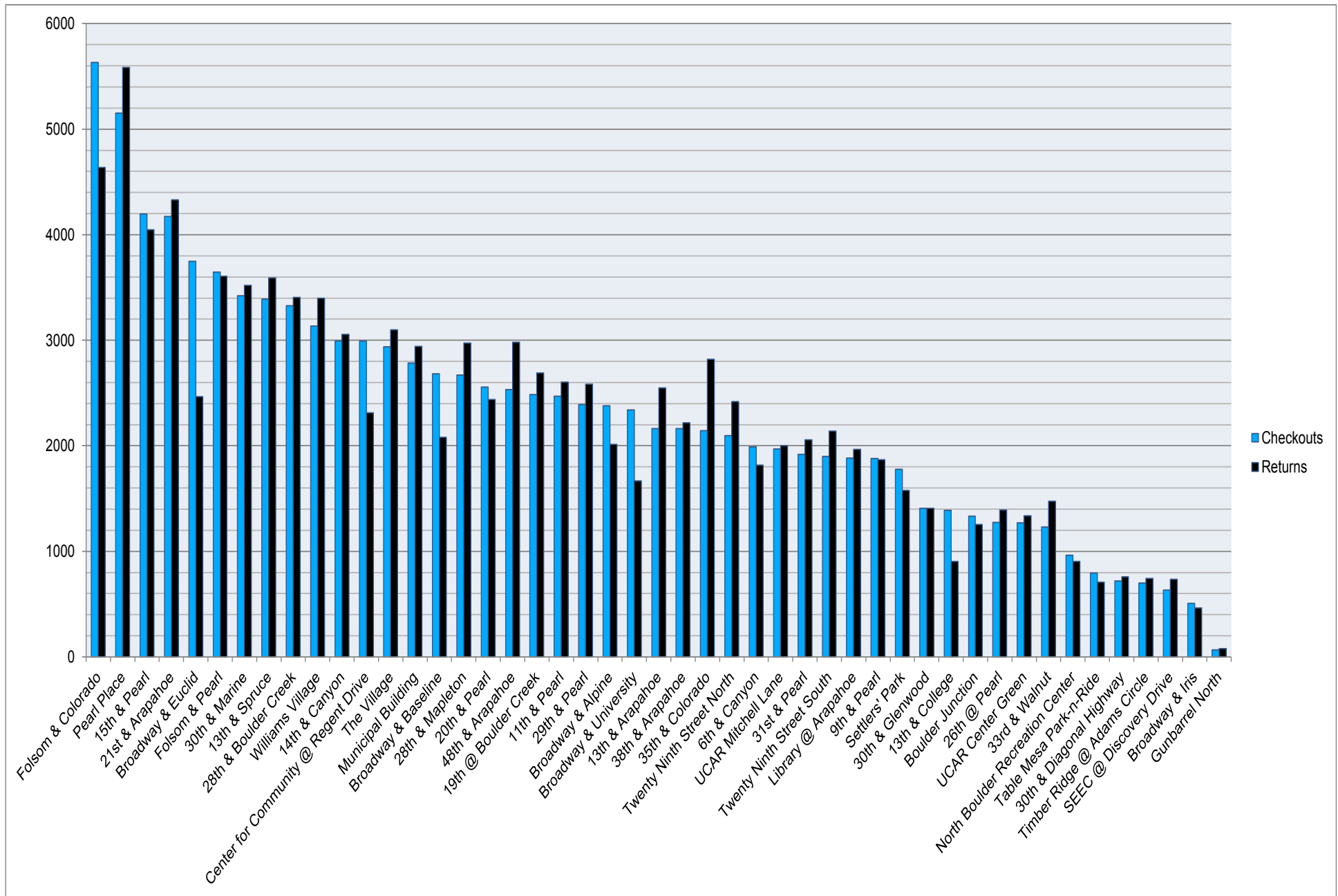
- Pearl Place to 33rd & Walnut
- Broadway & Euclid to Broadway & Euclid
- 21st & Arapahoe to 21st & Arapahoe
- 33rd & Walnut to Pearl Place
- Folsom & Pearl to Folsom & Pearl
- 31st & Pearl to 31st & Pearl
- 28th & Mapleton to Pearl Place
- Municipal Building to Municipal Building
- 38th & Arapahoe to 48th & Arapahoe
- Pearl Place to Pearl Place

Full trip data can be explored on the [Data & Reports](#) page of our website. The following page details a full comparison of checkouts and returns by station.

TOTAL ANNUAL SYSTEM TRIPS:



CHECKOUTS AND RETURNS BY STATION:



Note: Center for Community / Timber Ridge / SEEC stations were installed mid-way through 2018, thus don't reflect a full year of station use.

THE STATE OF THE MICRO-MOBILITY INDUSTRY

Welcome to the 2018 state of the industry section of Boulder Bike Sharing's annual report! It was a year of immense change, including the explosion of electric kick scooters and the dawn of novel micro-mobility devices, the near-collapse of the dockless bike-sharing bubble internationally, and consolidation across transportation modes as companies race to offer the most comprehensive single-app trip planning ecosystem.

SCOOTERS:

The first thing to discuss in the 2018 State of the Industry section is not bikes at all, but electric kick scooters. These new electric micro-mobility devices from companies like Bird, Lime (formerly LimeBike), Lyft, and Jump (Uber) arrived on the streets of US cities in huge numbers last year and experienced rapid adoption, generating impressive use statistics: Bird and Lime each served more than 10 million rides in the first year of operation¹. In general, these scooters are parked in the furniture zones of city sidewalks, located and unlocked using mobile applications, and are ridden standing up with charges starting at \$1.00 plus additional costs for each minute of use. At the end of trips the scooters are self-locking, though they are generally not tethered to any fixed object.



This exciting new form of transportation has been met with enthusiasm, with the North American Bikeshare Association (NABSA), comprising 80 member organizations across 9 countries announcing that it would "widen our scope to include other shared micro-mobility devices. If it fits in a bike lane, it fits in the North American Bikeshare Association."² Regionally, Bicycle Colorado and BikeDenver opined that scooters "...can play a pivotal role in achieving the goals laid out in Denver's Mobility Action Plan,"³ and indeed, the potential for scooters to replace some automobile trips is high. In response to the phenomena of scooters, Denver City Council updated city regulations to permit their use in bike lanes and to deter sidewalk riding, though cities are also generally limiting the hours of operation and the numbers of devices companies can operate in order to protect the right-of-way.⁴ These regulations, as well as growing awareness of and concern for injury trends linked to scooters, are likely to affect the ongoing adoption of this transportation mode in 2019.

As of early 2019, the City of Boulder does not define scooters and so defers to the State of Colorado's definition of these devices as toys. They are therefore not permissible on sidewalks, streets, or public property, but proposed legislation at the state level could compel Boulder to regulate if, where, and how electric kick scooters could be operated.⁵

INDUSTRY MATURATION AND CONSOLIDATION:

While most scooter rides in 2018 were taken on scooters deployed by independent startup companies Lime and Bird, last year also saw the acquisition of newer micro-mobility businesses by much larger mobility companies. In 2018 alone, ride-hailing giant Uber purchased electric dockless bike company Jump (formerly a product of Social Bicycles, or SoBi), Lyft purchased Motivate (the for-profit and exclusive operator of docked bike sharing systems in most large US cities), and Ford Motor Company purchased Spin, another bike-share startup that, like LimeBike, quickly adjusted its primary offering to electric kick scooters. For ride-hailing companies, the race is on to offer shared rides, autonomous vehicle rides, transit, bikes, and scooters on a single platform, with subscriptions and promotions that will invite customers to effectively choose single transportation provider.

Plenty of other companies have taken notice of the proliferation of novel devices, with product manufacturers like Razor and Segway launching their own scooter services, and the OjO sit-down electric scooter company deploying its products as a shared mode. Boosted, the company known for offering electric skateboards, even raised \$60 million for research into "light electric vehicles" as this segment of the micro-mobility industry continues to grow.⁶



DOCKLESS COLLAPSE:

If the enthusiasm around scooters sounds familiar, it's because similar praise was lauded on dockless bike-sharing companies such as ofo and Mobike when they exploded in the US in 2017. However, the fate of this industry segment changed rapidly, with many of the millions of bikes launched now out of service and Forbes profiling how ofo went from "...billion-dollar startup to the verge of bankruptcy in less than four years."⁷ Regionally, the Ofo pilot program at the University of Denver folded, and the companies participating in the City of Aurora's dockless bike sharing program have ceased operations there. Boulder's City Council approved an emergency dockless bike-sharing ordinance in June 2018 in an effort to mitigate the potential negative impacts of dockless bikes, though as of February 2019 no companies have applied for permits to operate under this regulation.

While dockless untethered bikes are no longer available in most US cities, tethered electric bikes, which lock to fixed objects in order to prevent theft or damage from tipping over, are still increasing in number. Specifically, Jump's electric bikes operate in 15+ US cities and are emerging as preferable to parent company Uber's riding-hailing options in certain cases.⁸ As Uber and Lyft continue to face scrutiny for data showing that the services have so far increased congestion in urban areas, both companies are eager to diversify their product offerings, especially low-carbon modes. As these companies near public offerings they also seek to operate micro-mobility services profitably, which may have inspired Uber to launch a "new 'micromobility' department to bring self-driving technology to electric scooters and bikes."⁹



Jump Electric Shared Bike System

LOCAL UPDATE:

Here in Boulder, the dock-based B-cycle system established another annual record, with more than 108,000 trips in 2018. Collectively, the system's 300 hard-working bikes have accumulated more than 500,000 lifetime trips and have been ridden more than a million miles – meaning that the average bike in the fleet is well into its second trip across the US! In order to keep operating the Boulder B-cycle as efficiently as possible while maximizing the impact of a dock-based system, Boulder Bike Sharing's 2019-2021 strategic plan calls for the relocation of low-use stations to higher-density areas of the city and the advancement of partnerships to introduce as many riders as possible to bike sharing in conjunction with other shared modes.



Sources

- ¹ <https://techcrunch.com/2018/09/20/bird-hits-10-million-scooter-rides/>
- ² <https://nabsa.net/2018/12/13/nabsa-rolls-forward-with-strategic-vision-for-2019/>
- ³ <https://www.bicyclecolorado.org/bike-news/dockless-mobility-technology-arriving-on-denvers-streets/>
- ⁴ <https://www.denverpost.com/2019/01/07/denver-dockless-scooter-rule-changes/>
- ⁵ <https://leg.colorado.gov/bills/hb19-1221>
- ⁶ <https://electrek.co/2018/12/20/boosted-60m-light-electric-vehicles/>
- ⁷ <https://www.forbes.com/sites/ywang/2018/12/20/how-chinas-bike-sharing-startup-fo-went-from-tech-darling-to-near-bankruptcy/#4ae2b02266e6>
- ⁸ <https://www.engadget.com/2019/02/08/uber-jump-bikes-lead-to-fewer-car-rides/>
- ⁹ <https://www.techradar.com/news/uber-e-bikes-could-drive-park-and-charge-themselves>

Suggested Reading

MobilityLab: Are scooters here to stay? Here's our take (and suggestions for future research)
Inc: Are Investors in Scooter Platforms Betting on a Fad?
Quartz: Simple math shows how scooters could make big money

FINANCIAL OVERVIEW

As a 501(c)(3) nonprofit organization, Boulder Bike Sharing relies on community support to sustain and grow our bike-share program.

Capital Funding—Historically, most bikes and stations were purchased using federal, state, and local government grants. However, since 2017, new station locations have been funded privately or by Boulder Bike Sharing.

Operational Funding—Our operating and general & administrative expenses are funded through sponsorships, memberships, overtime fees and operating grants.

CAPITAL

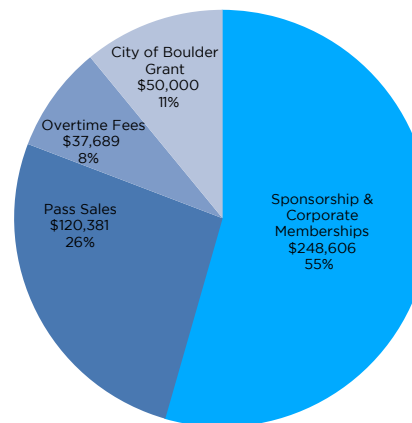
Revenue	\$46,264
Expenses	\$20,871
Surplus	\$25,393



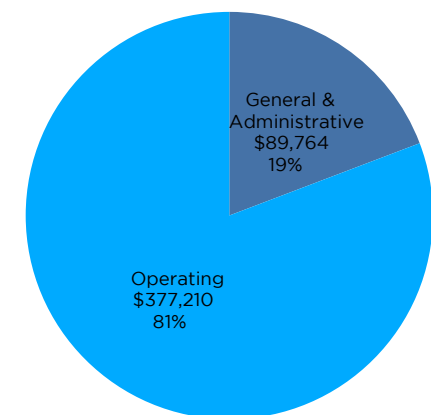
OPERATING

Revenue	\$456,676
Expenses	\$466,974
Deficit	\$10,298

Revenue



Expenses



Net Surplus \$15,095

SPONSORS & PARTNERS

Kaiser Permanente continued as the system's presenting sponsor for 2018, and the company was recognized on every bike and station.

In addition, many other sponsors and corporate members supported Boulder Bike Sharing's mission, making sustainable and fun transportation in Boulder possible!



Kaiser Permanente Triangle Badge



Hyatt Place Skirt Guard



Lems Basket



Kaiser Permanente Station End Cap



Made in Nature Basket



Kaiser Permanente Wrapped Bikes



Google Station



Elevations Basket



eGo CarShare handlebar

2018 SPONSORS & PARTNERS

Presenting
Sponsor



**KAISER
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STAFF



Kevin Crouse



Kevin Bell



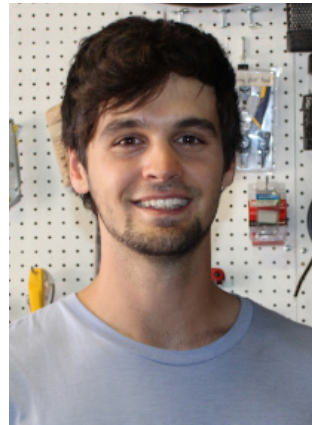
Erica Congelli



Sara Michaels



Todd Root



Dakota Beck



Bill Chait



Sean Fitzgerald

STAFF

Kevin Crouse / Executive Director

Kevin Bell / Marketing & Sales Director

Sara Michaels / Marketing, Sponsorship & Communications Manager

Erica Congelli / Member Services Manager

Todd Root / Fleet Technician

Dakota Beck / Field Technician

Bill Chait / Field Technician

Ricchi Machado / B.E.A.S.T. Master

Sean Fitzgerald / Field Technician

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