

Keeping Pace with Dockless:

How Capital Bikeshare Can Compete with Private Micromobility

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Executive Summary

- Capital Bikeshare competes with private micromobility.*
- Micromobility ridership is higher than Capital Bikeshare's.
- Capital Bikeshare's new e-bikes have driven ridership growth.
- E-bike deployment is key to competing with micromobility.

*Micromobility here refers to private companies providing dockless, electronically assisted rideables.

Background

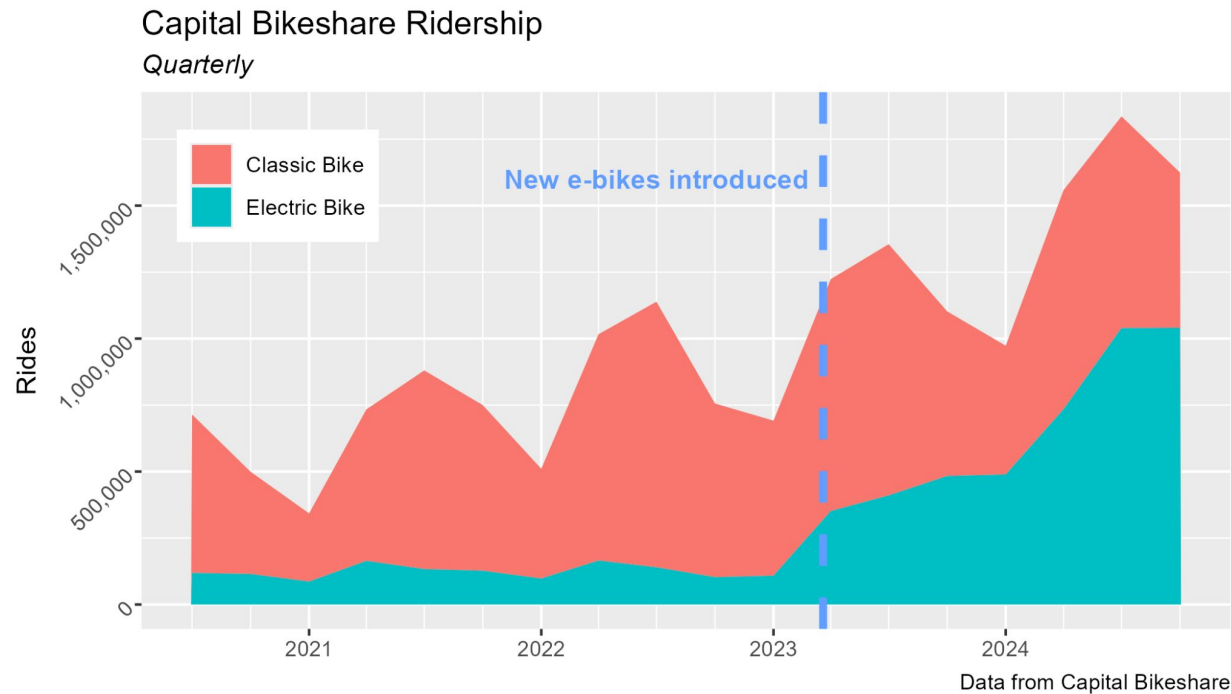
- Since 2017, DC and other local governments have allowed micromobility companies to operate dockless e-bikes and scooters.
- In 2023, DC raised its cap on micromobility rideables to 10,000 e-bikes and 20,000 scooters.
- Capital Bikeshare first introduced e-bikes in 2018.
- In 2023, Capital Bikeshare introduced a new e-bike model with improved performance and durability.
- Capital Bikeshare has stated it will greatly increase the proportion of new e-bikes in its fleet.

Analysis Objectives

- Analyze the popularity of Capital Bikeshare's new e-bikes.
- Compare Capital Bikeshare and micromobility ridership.
- Analyze differences in how riders use Capital Bikeshare and micromobility.

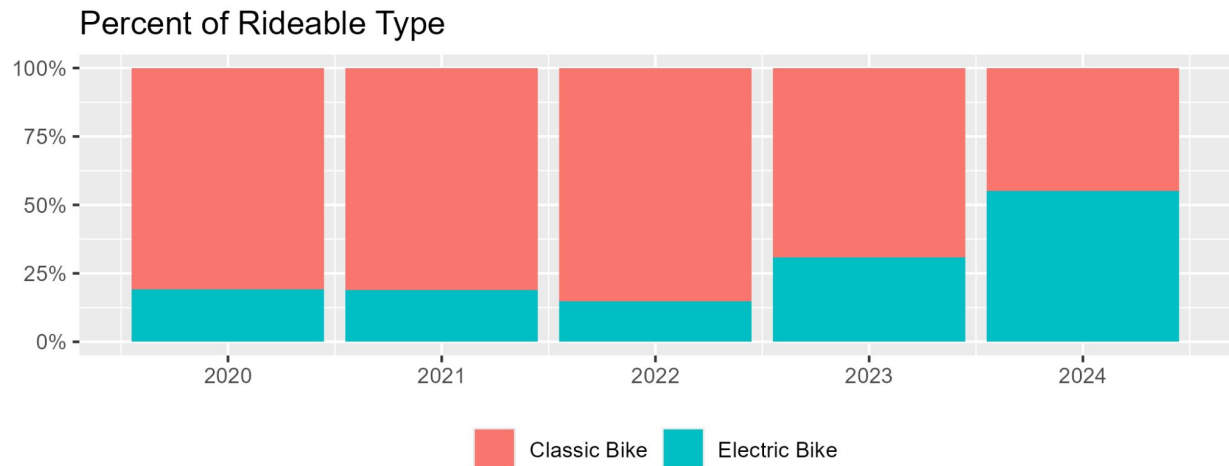
E-bikes Propel Ridership

Total ridership has grown steadily in recent years, with e-bikes driving the increase.



Majority Electric

The **proportion of e-bike rides increased** after introducing the new e-bikes, and accounted for **the majority of rides in 2024**.



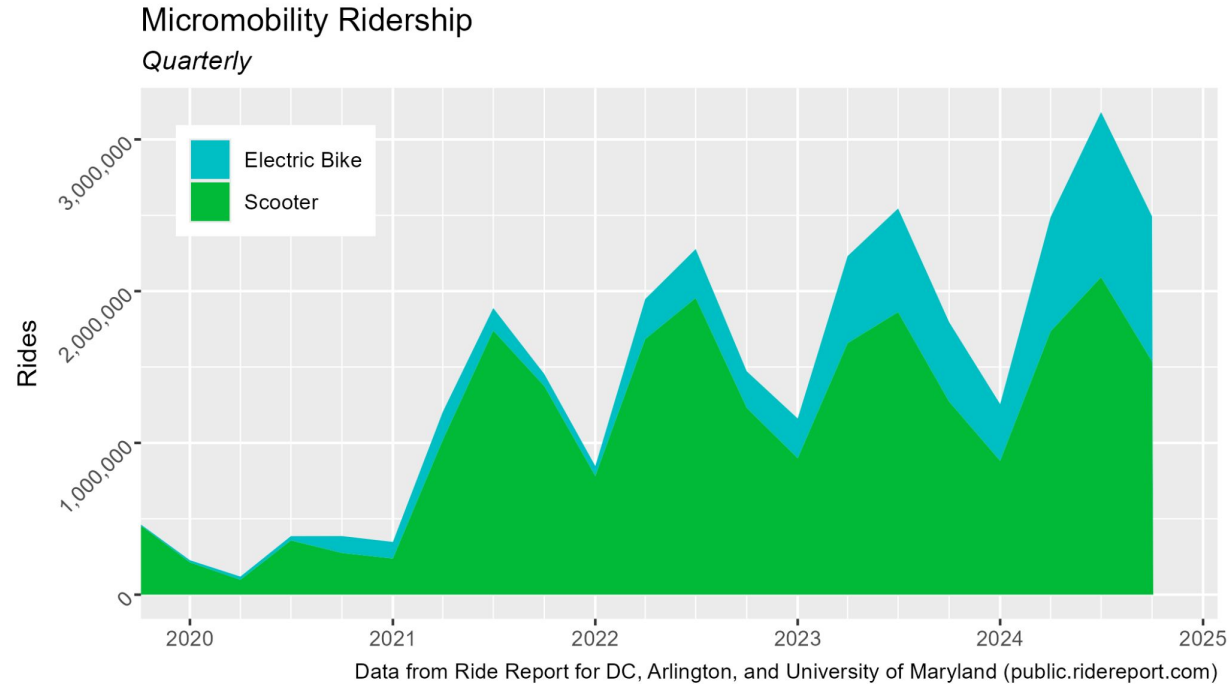
Data from Capital Bikeshare

61%

Of Capital Bikeshare rides were e-bikes in October 2024, the highest ridership month ever.

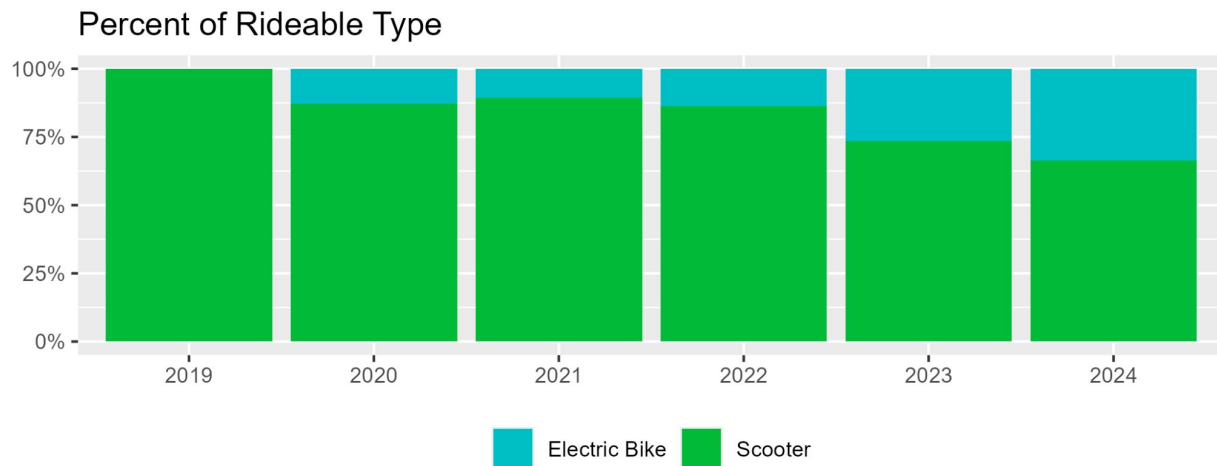
A Flood of Micromobility

Micromobility ridership has grown steadily in recent years, with **e-bikes driving growth since 2022**.



E-bikes Gaining on Scooters

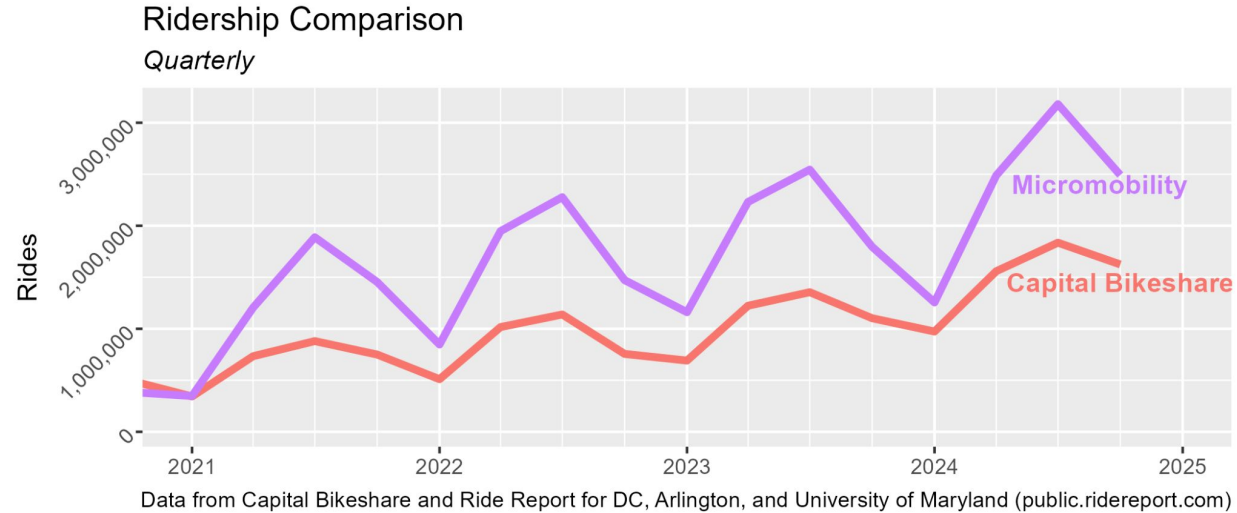
Scooters dominate ridership, but the proportion of e-bike rides is growing.



Data from Ride Report for DC, Arlington, and University of Maryland (public.ridereport.com)

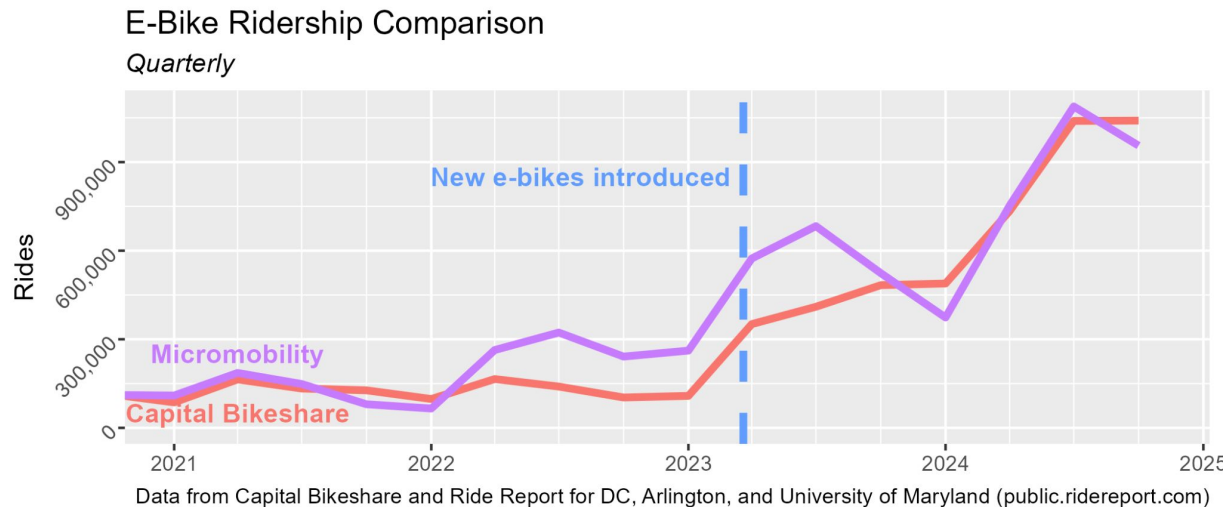
Stiff Competition

Micromobility ridership has been **consistently higher** than Capital Bikeshare since 2021.



Overtaking the Competition?

Micromobility e-bikes overtook Capital Bikeshare e-bikes in 2022, but Capital Bikeshare **closed the gap after introducing the new e-bikes.**



15,000

Average number of micromobility rideables available in DC per day in Q3 2024.

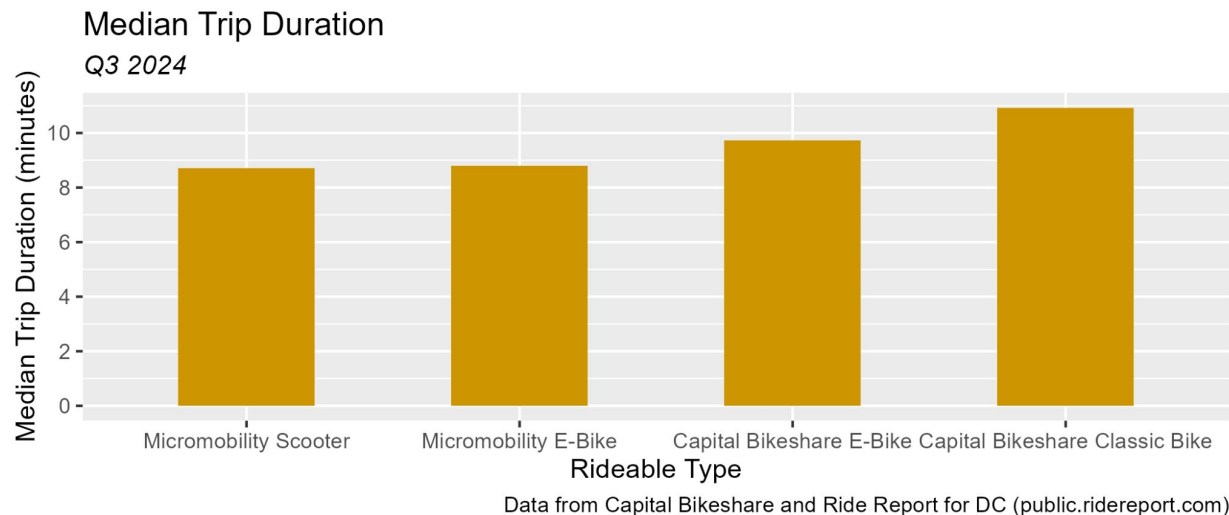
6,000

Rideables in Capital Bikeshare's fleet in 2024.

Different Rideables, Similar Trips

Median trip time is **similar for all rideable types**.

This suggests riders do not choose a rideable based on their expected trip time.



Findings

- The market is growing for both Capital Bikeshare and micromobility.
- E-bikes are growing in popularity, regardless of provider.
- Riders likely select the most available option, regardless of rideable type or provider.

Recommendations

- **Invest in e-bikes.** E-bikes drove Capital Bikeshare to its highest-ever ridership. Add more e-bikes to the fleet and keep them in a state of good repair.
- **Continue system expansion.** Riders choose the service that is most convenient. Continue building out stations where demand exists.
- **Compete on price.** As a subsidized system, a Capital Bikeshare e-bike ride is generally cheaper than a micromobility ride. Make customers aware of the price difference.