



City of Santa Monica
Shared Mobility Device Pilot Program
Public Survey Results
Conducted 07-16-2019 to 08-02-2019

October 28, 2019

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Public Survey Background

On June 26, 2018, the Santa Monica City Council unanimously approved a 16-month pilot program for dockless shared mobility devices, including electric scooters and bicycles. The pilot program launched on September 17, 2018 with four permitted operators—Bird, Jump, Lime, and Lyft—that were selected through a competitive procurement process.

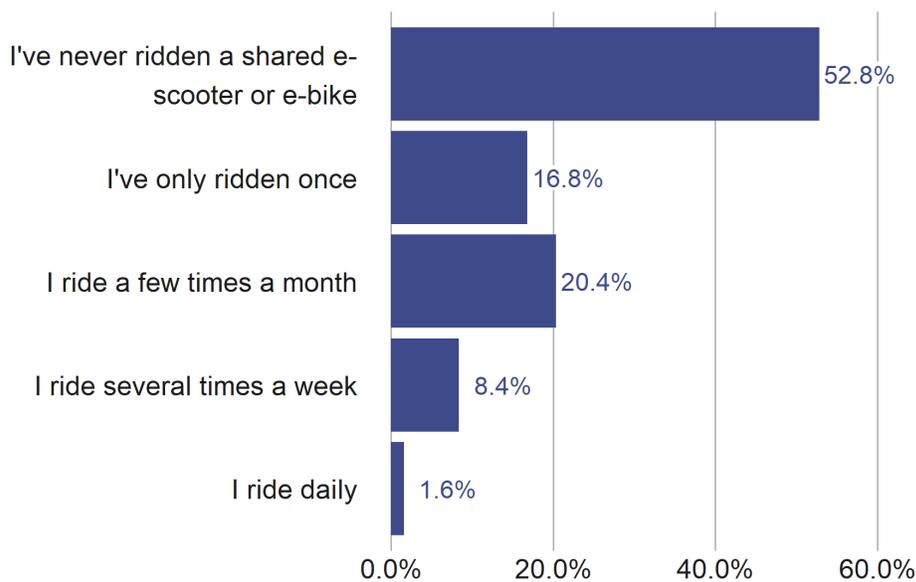
As a part of the program the City conducted a general community survey in order to better understand perceptions of the pilot program, community awareness of shared mobility rules, and community sentiment toward issues specific to shared mobility. The community survey was created and hosted by the City, and distributed on City of Santa Monica social media feeds, *Nextdoor*, City email, and emailed to neighborhood associations to be distributed to their membership. The survey was open to responses from July 16, 2019 to August 2, 2019. A total of 1,261 community members self-selected to respond to the survey. No rewards or incentives were offered to respondents of the survey.

Below is a summary of the public survey responses, key takeaways, and total survey response data.

Who Responded to the Shared Mobility Survey?

Respondents were asked how often they use shared e-scooters/e-bikes, where in Santa Monica they live, how old they are, their gender, and the other travel modes they use on a weekly basis. Overall, about 30 percent of respondents use shared e-scooters/e-bikes on a regular basis. This number is substantially higher among younger respondents, who are under-represented relative to the full Santa Monica population. While shared mobility usage is higher among non-resident respondents, it is also higher among respondents who live in Santa Monica zip codes that are under-represented in the survey response.

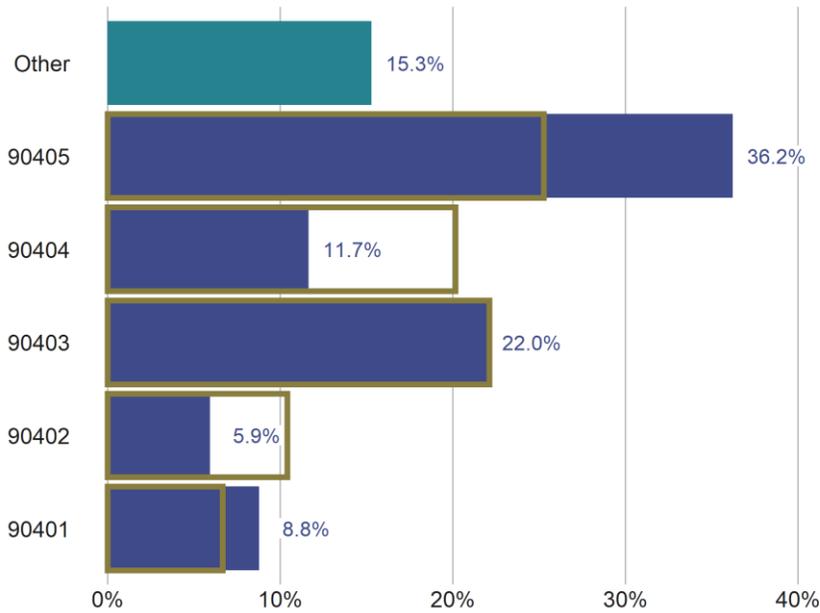
Figure 1 Percentage of Respondents by Shared Mobility Use



Key Takeaways

- Just over half of survey respondents have never taken a shared e-scooter/e-bike trip, and another 17 percent have only taken one trip. In further analyses, these respondents are grouped into a single category – Once or Never Ridden – which comprises 70 percent of total survey responses.
- About one in five respondents report taking shared mobility trips several times a month, with another one in ten taking trips either several times a week or daily. In further analysis, these respondents are grouped into a single category labeled Habitual Riders, which comprises 30 percent of total survey responses.

Figure 2 Percentage of Respondents by Home Zip Code

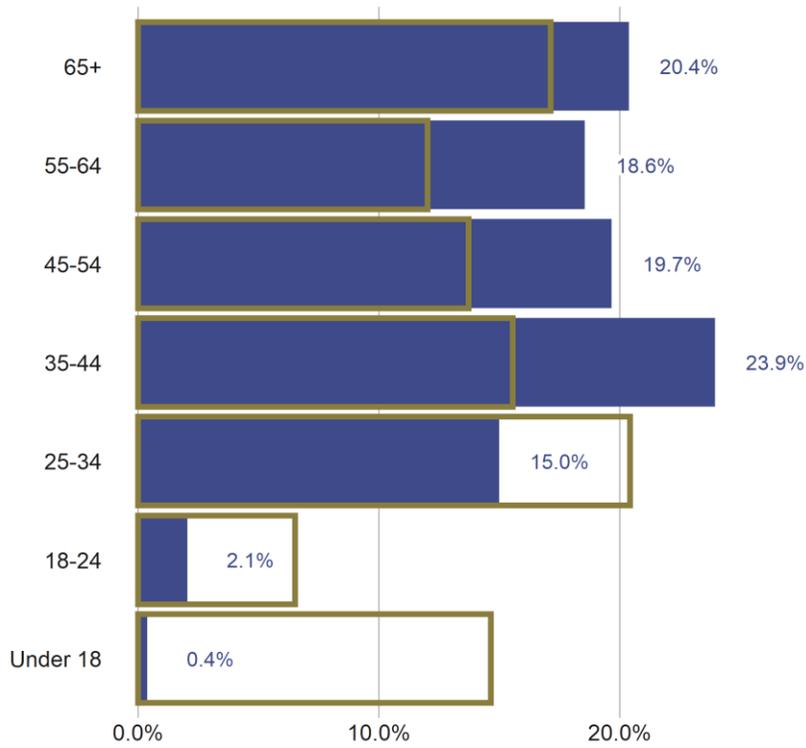


Gold outlines give the percentages of respondents by Santa Monica zip codes if the respondents were perfectly proportional to zip code population as recorded in the US Census.

Key Takeaways

- Survey respondents were asked to report the zip code in which they live. The 15 percent of respondents who did not provide a Santa Monica zip code provided one that was either out of town (most common) or invalid.
- Among Santa Monica zip codes, residents of 90405 were somewhat over-represented relative to underlying populations, while residents of 90404 and 90402 were under-represented.

Figure 3 Percentage of Respondents by Age

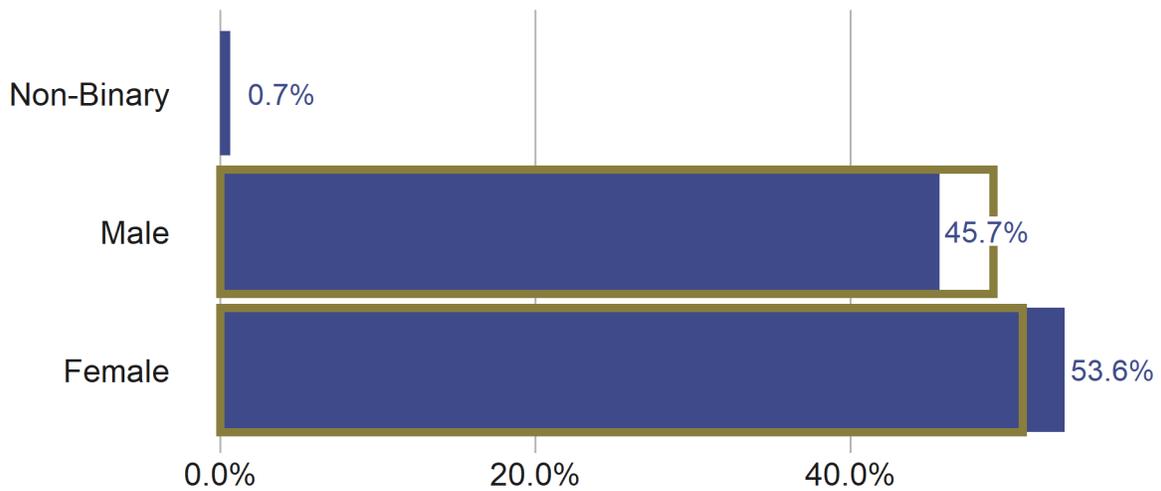


Gold outlines give the percentages of respondents by age if respondents were perfectly proportional to Santa Monica population as recorded in the US Census.

Key Takeaways

- Relative to the underlying Santa Monica population, survey respondents skewed older, with residents younger than 35 – and particularly those younger than 25 – under-represented, and those 35 and older over-represented.

Figure 4 Percentage of Respondents by Gender

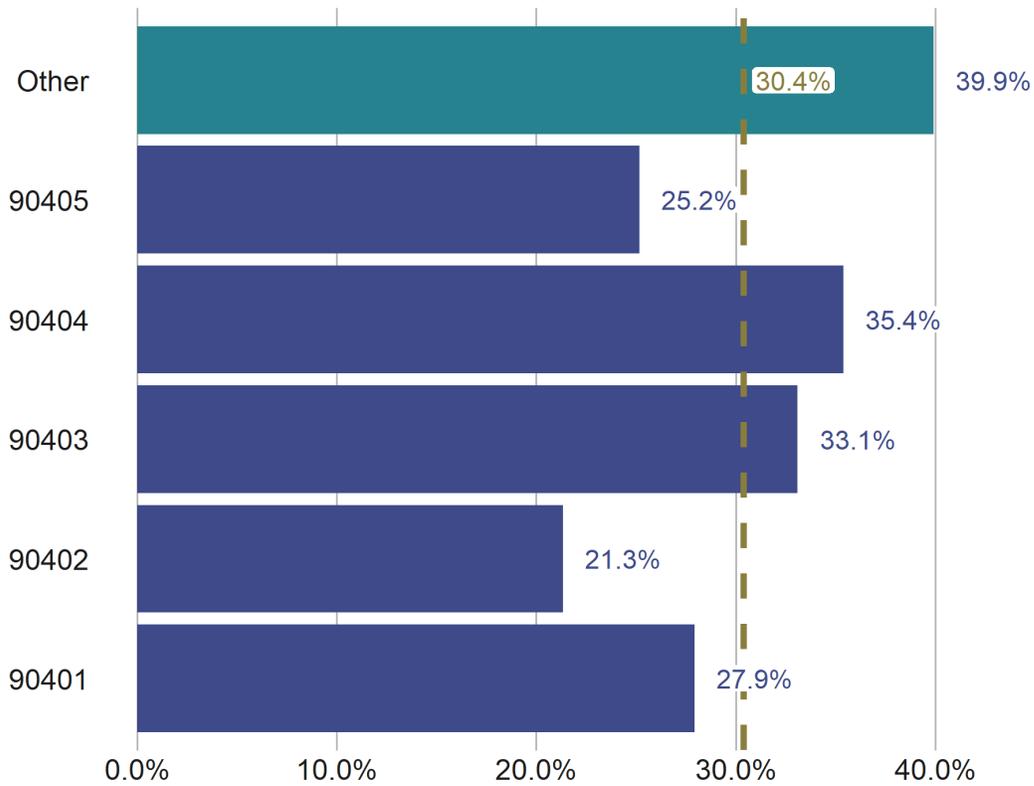


Gold outlines give the percentages of respondents by gender if respondents were perfectly proportional to Santa Monica population as recorded in the US Census.

Key Takeaways

- The gender representation of survey respondents was balanced and matched closely to the underlying population, with a slight over-representation of female respondents.

Figure 5 Percentage of Respondents Who Are Habitual* Shared Mobility Users by Zip Code

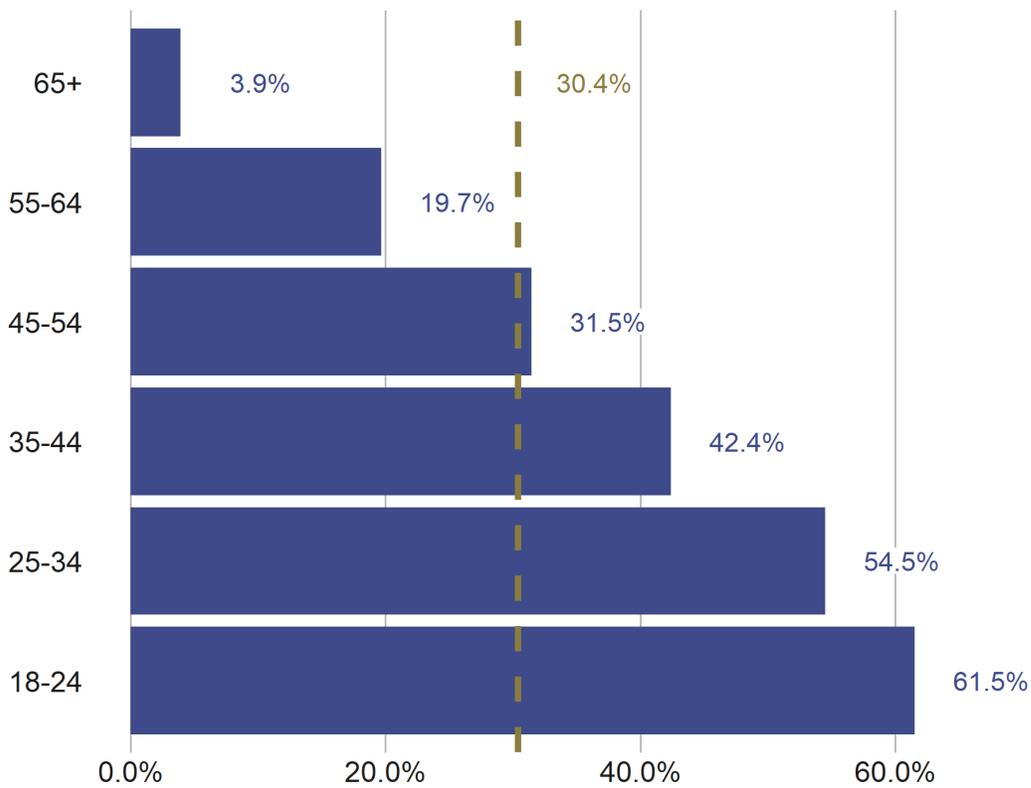


*"Habitual" use is defined as riding a few times a month or more; overall survey average shown by dashed gold line.

Key Takeaways

- While 30 percent of total respondents reported being Habitual Riders – taking several trips a month or more – this number varied considerably by zip code.
- Respondents from zip codes 90403 and 90404 were more likely to be Habitual Riders.

Figure 6 Age Distribution of Habitual Shared Mobility Users

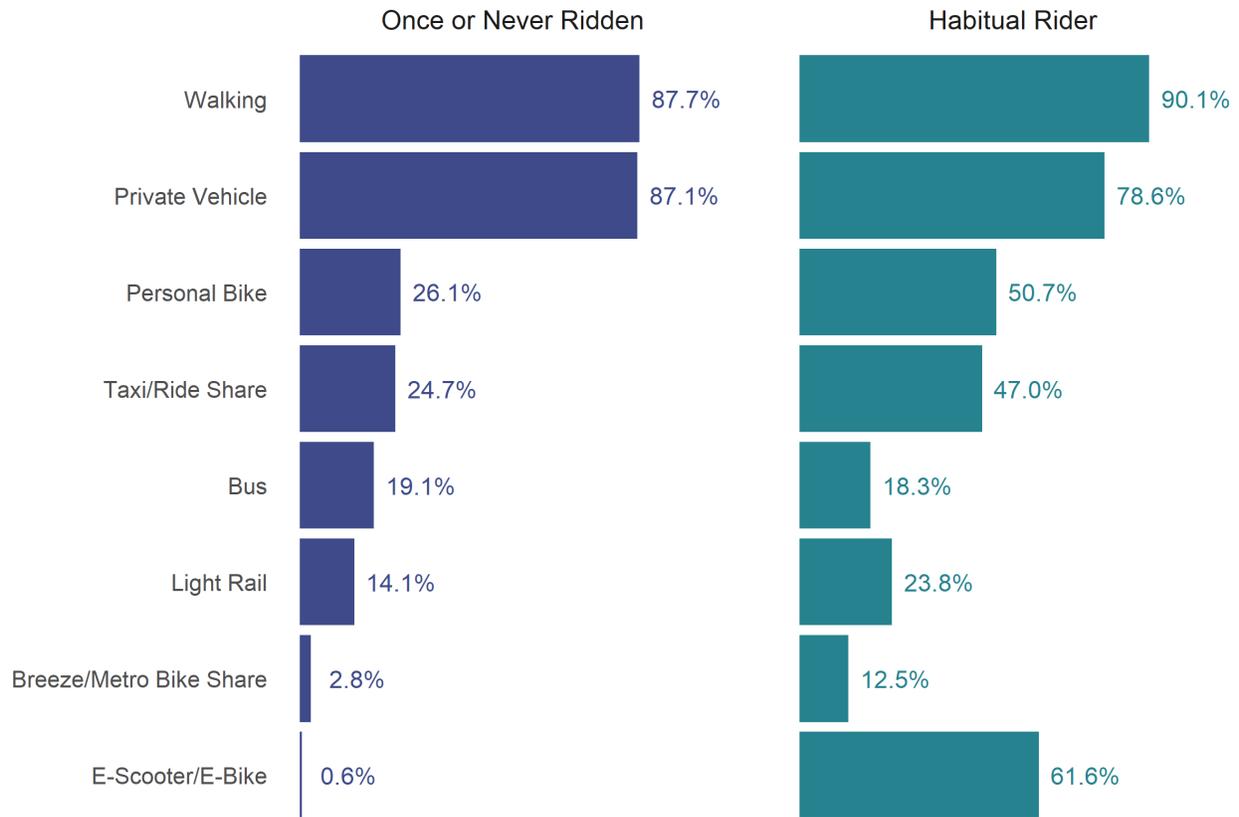


*"Habitual" use is defined as riding a few times a month or more; overall survey average shown by dashed gold line.

Key Takeaways

- The rate of habitual ridership varied even more by age, with a progressive decrease in e-scooter/e-bike ridership as respondents increase in age.

Figure 7 Percentage of Respondents Who Use the Following Travel Modes Weekly, Split by Respondents Who Habitually Use Shared Mobility and Those Who Have never/once Used Shared Mobility



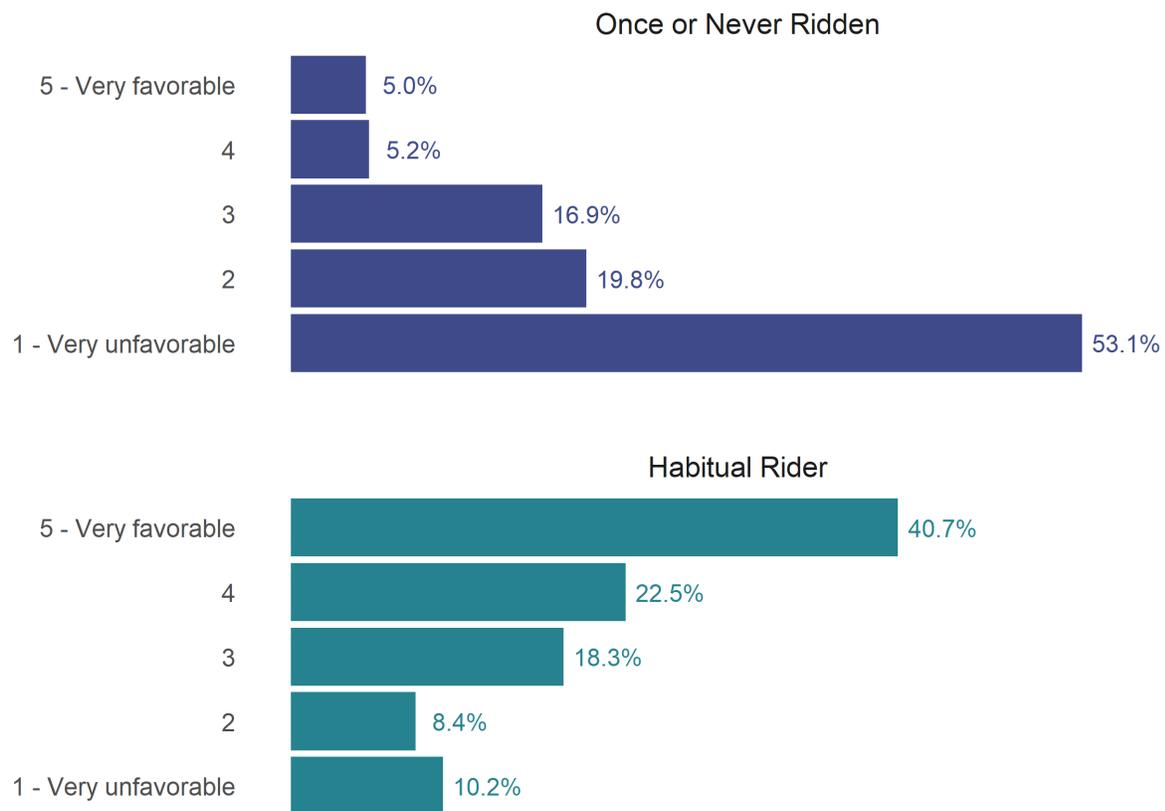
Key Takeaways

- The full body of respondents uses a variety of travel modes on a weekly basis, with walking and private vehicles predominating.
- A sizeable minority of respondents report riding a personal bike and using ride share services or taxis, though these modes are much more common among habitual shared mobility users.
- Bus transit use rates are similar among shared mobility users and non-users.

What Is General Perception about the Shared Mobility Pilot Program?

Respondents expressed divergent opinions on the overall impact of shared e-scooters/e-bikes, depending on whether or not they use these vehicles. Habitual users tend to think that e-scooters/e-bikes have had a positive effect on Santa Monica transportation, and that their operation and use has improved since the summer of 2018. Non-users tend to believe that shared e-scooters and e-bikes have had a negative impact, and that their operation has not improved.

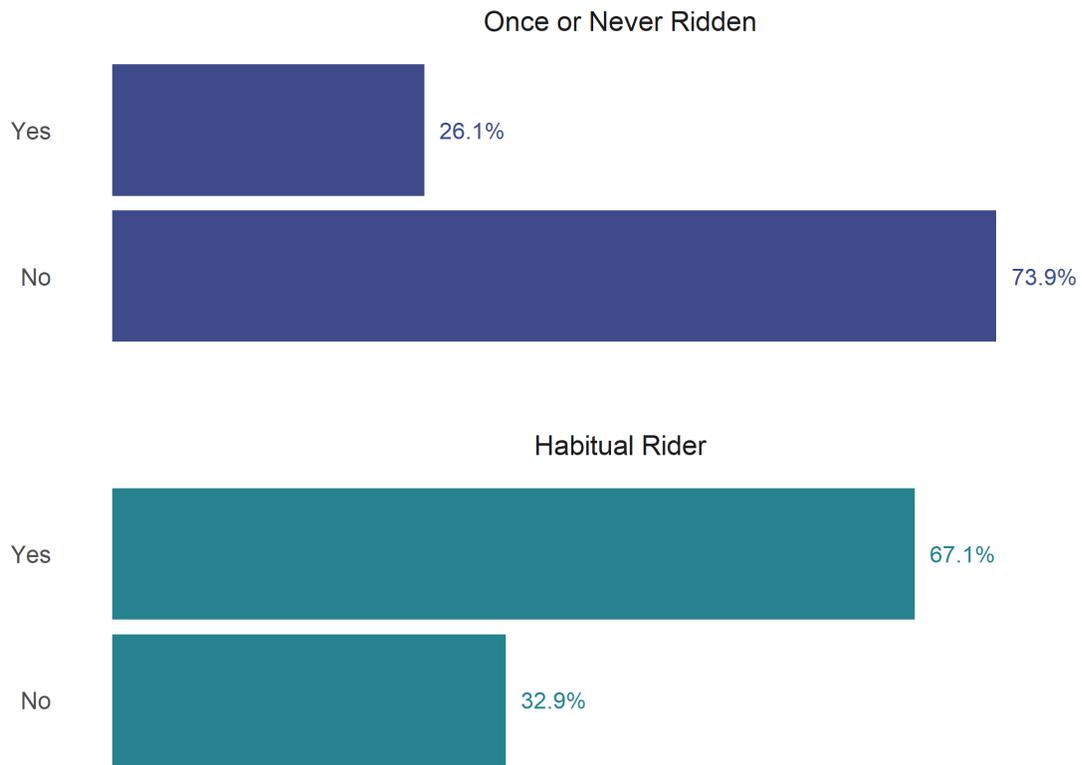
Figure 8 Percentage of Respondents with Favorable View of Shared Mobility Services' Impact on Santa Monica Transportation



Key Takeaways

- 63 percent of Habitual Users think that e-scooters/e-bikes have had a favorable or very favorable impact on Santa Monica transportation.
- Only 9 percent of non-users think that e-scooters/e-bikes have had a favorable or very favorable impact, while 73 percent think that they've had an unfavorable or very unfavorable impact.

Figure 9 Percentage of Respondents Who Believe that Operations and Use of E-Scooters/E-Bikes Has Improved Since Last Summer



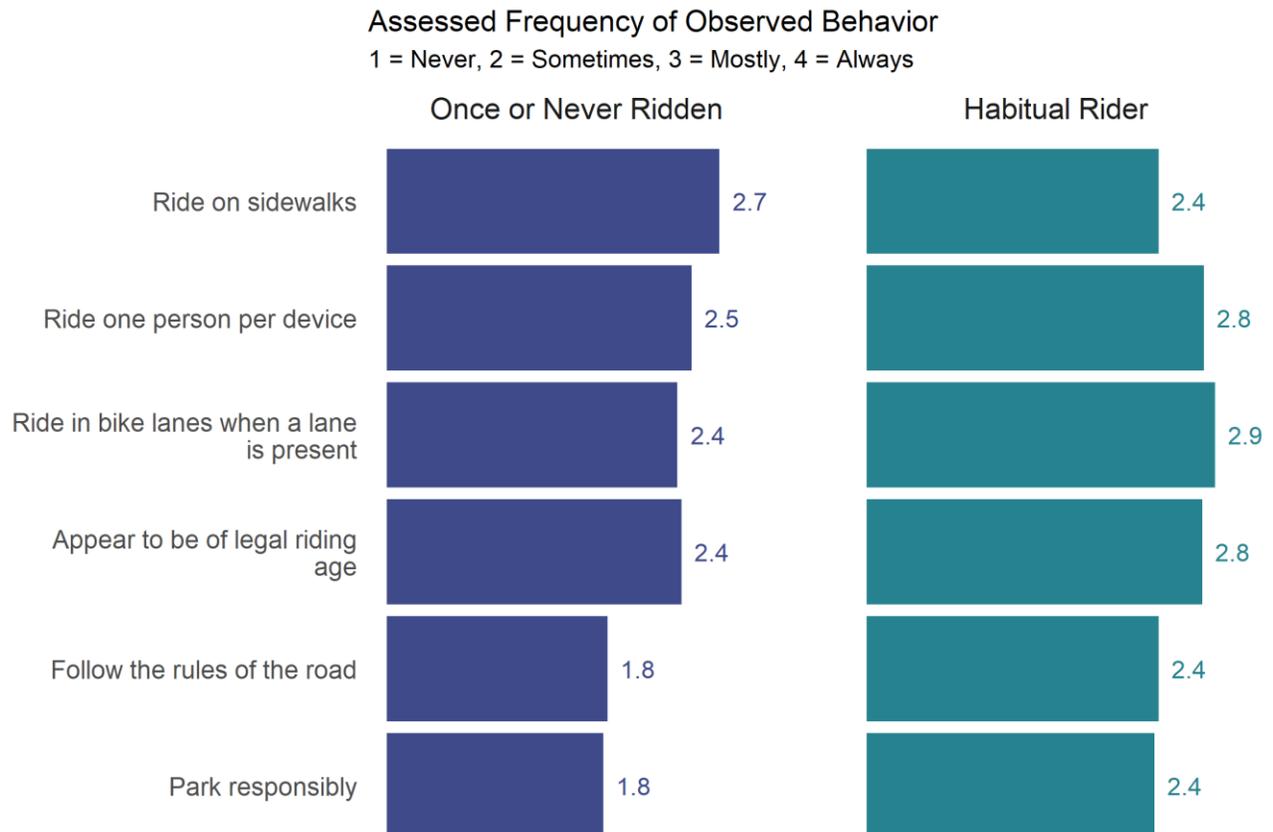
Key Takeaways

- Assessment of the improvement of shared mobility operation and use mirrors overall opinions of shared mobility's impact.
- Habitual riders are inclined to say that operations have improved, while non-riders are inclined to say that they haven't. Overall responses reflect the larger body of non-users in the full pool of survey respondents.

What Are Perceptions about Shared Mobility Operations and Issues of Importance?

Survey respondents were prompted for their opinions on a wide range of shared-mobility-related issues.

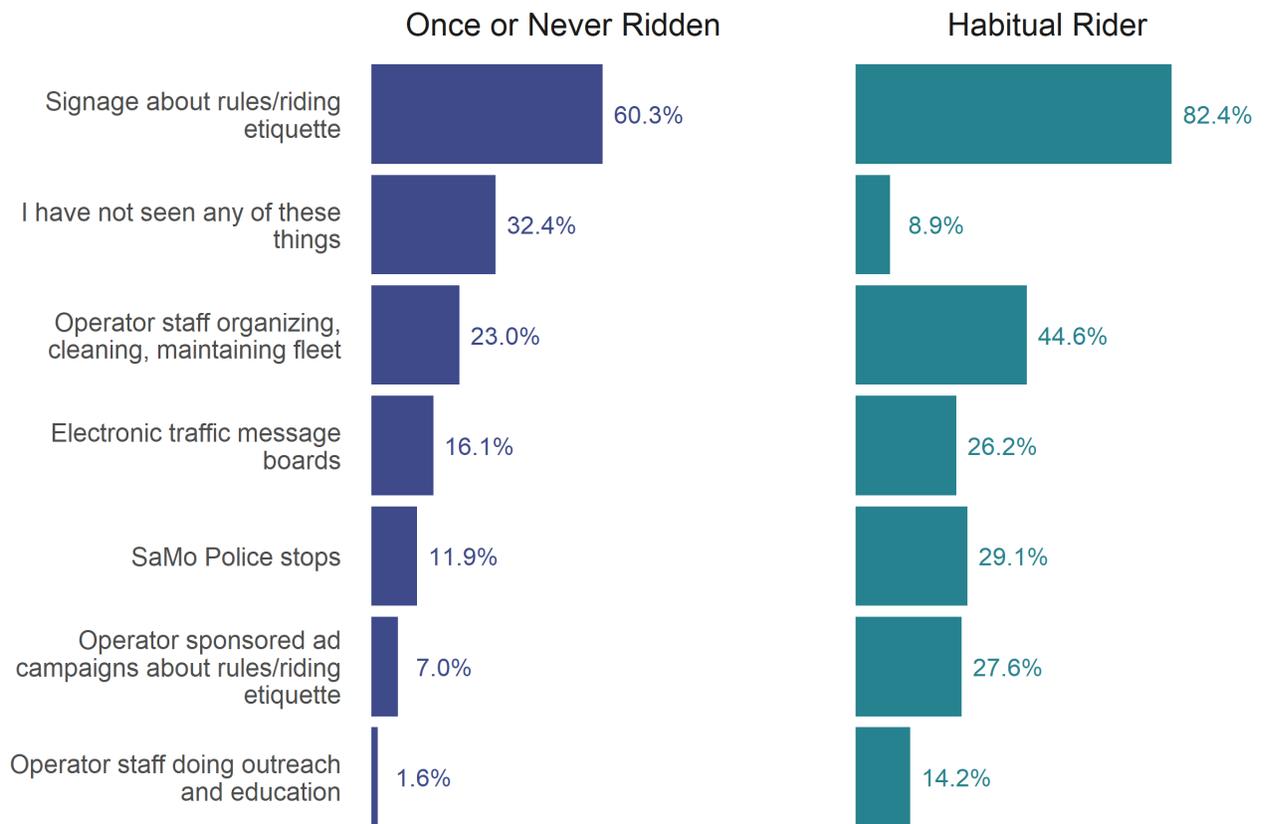
Figure 10 Average Frequency with which Respondents Observed Rider Behavior



Key Takeaways

- Issues of sidewalk safety and clutter tended to emerge as the most pressing among the full body of respondents.
- Survey respondents regularly notices a wide range of e-scooter/e-bike user behavior, both good and bad.
- Non-users are slightly more likely to notice the bad (riding on sidewalks) and unlikely to notice the good (riding in bike lanes when present, following rules of the road, parking responsibly).
- Even among Habitual Riders, respondents tend to only “sometimes” notice shared mobility users parking responsibly and following the rules of the road.

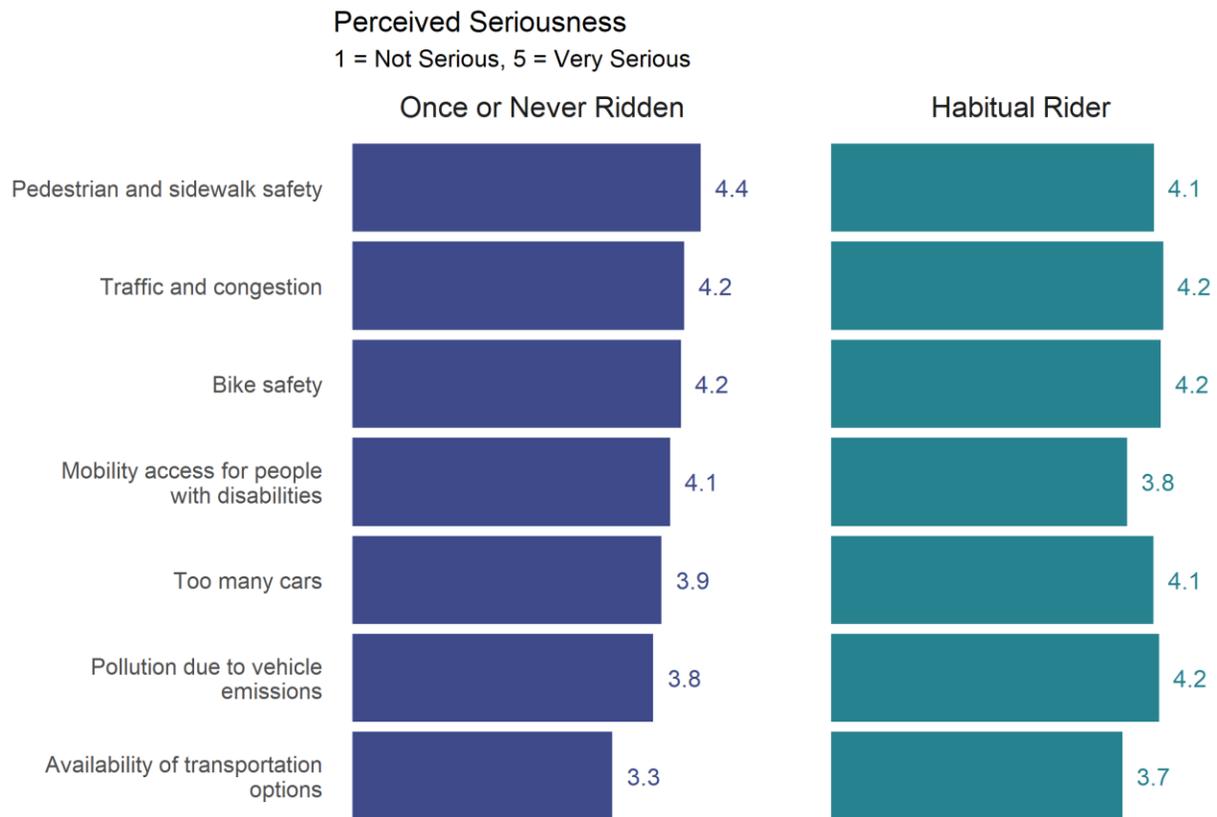
Figure 11 Percentage of Respondents Who Have Witnessed the Following Operations



Key Takeaways

- Habitual riders are more likely to report noticing the full range of shared mobility communications and operational actions.
- Across the board, respondents are more likely to notice signage about rules and etiquette, and less likely to notice police stops or operator maintenance and outreach efforts.

Figure 12 Average Seriousness with which Respondents Regard Transportation Issues

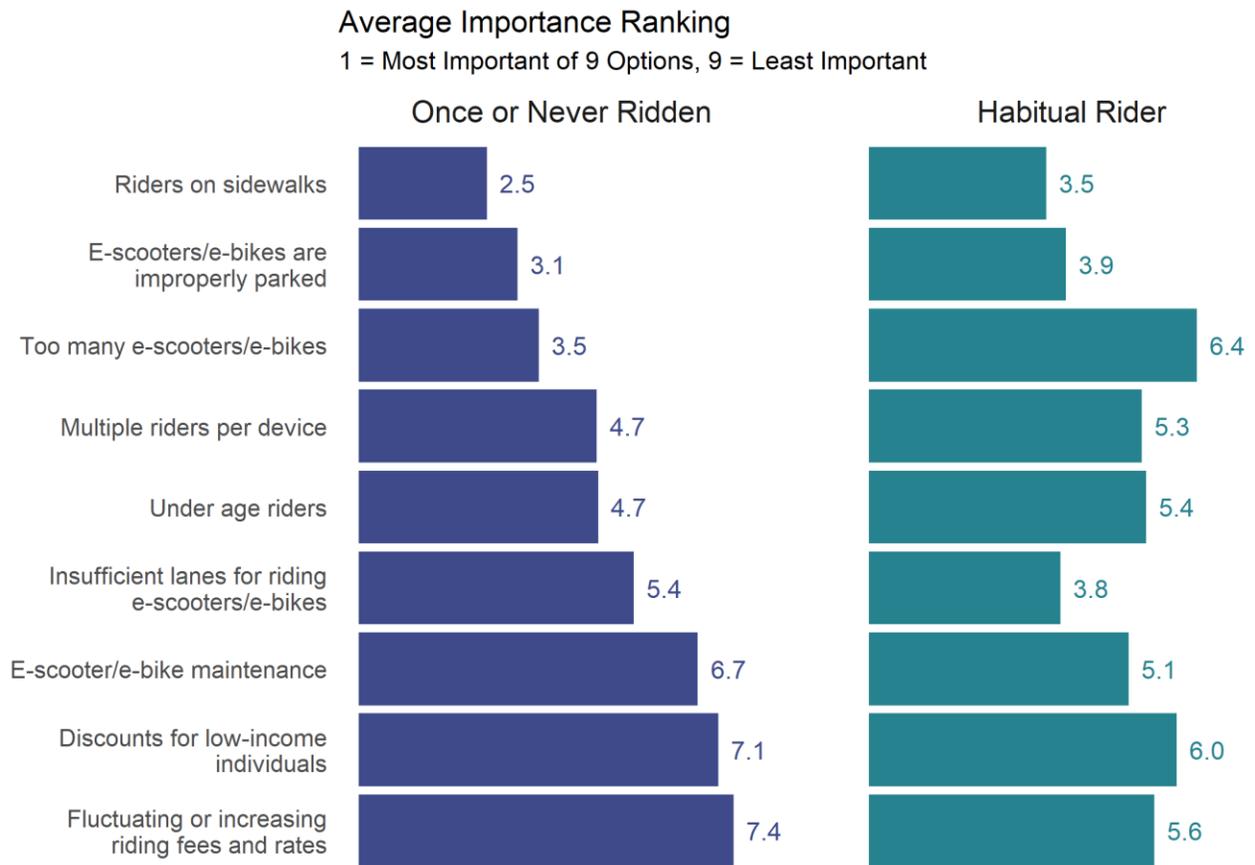


Key Takeaways

- All respondents tend to take seriously the entire set of transportation issues presented to them. Overall, pedestrian safety and traffic congestion were seen as the most important.
- The difference between users and non-users was relatively small for this prompt, though Habitual Users were more likely to be concerned about the availability of transportation options and about vehicle pollution, and less likely to be concerned about pedestrian safety.

Figure 13 Average Ranked Importance of Issues Surrounding Shared Mobility Program

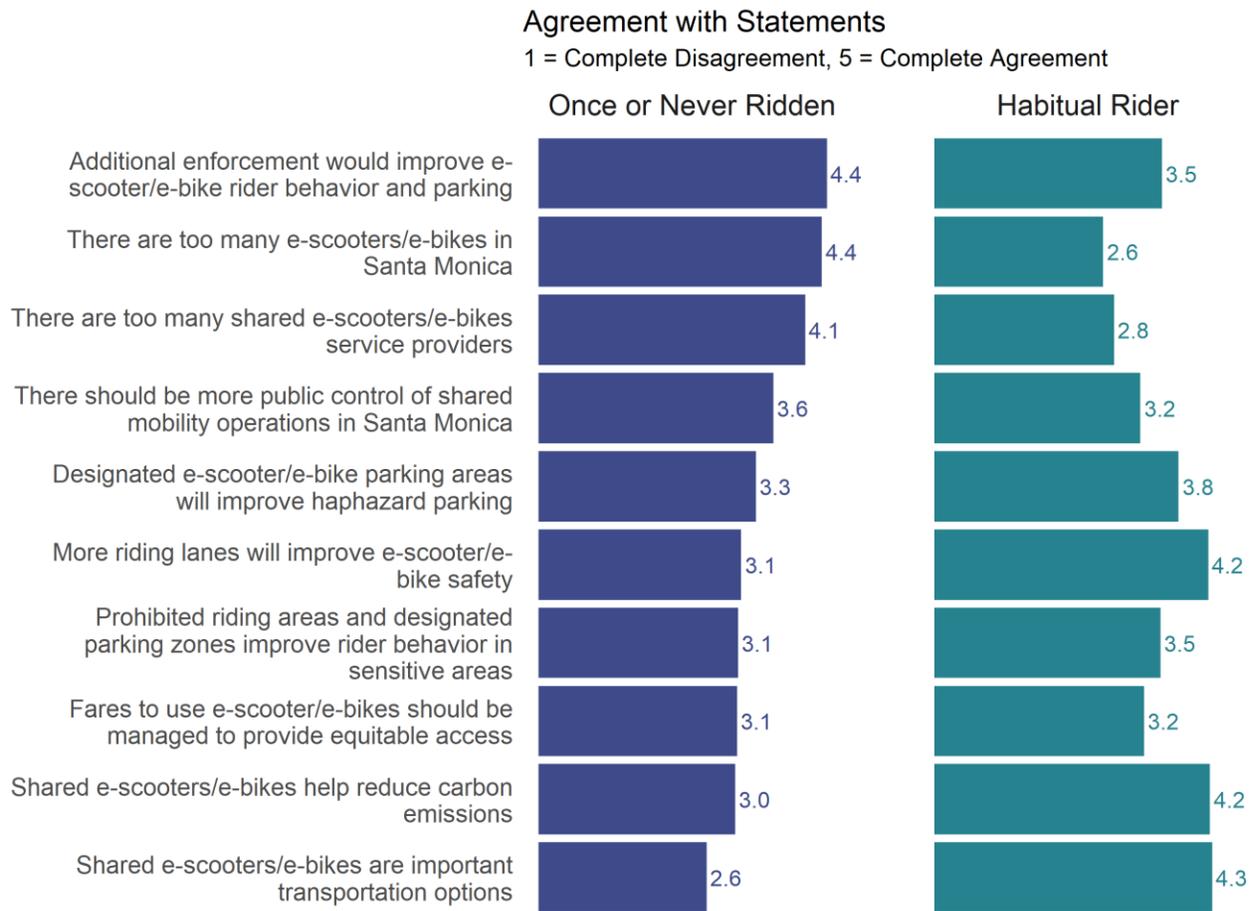
(Lower numbers correspond to greater importance.)



Key Takeaways

- In reading this graph, note that lower numbers correspond to greater importance.
- The most important shared mobility issue among all respondents was riders on sidewalks, followed closely by improper e-scooter/e-bike parking, and an over-abundance of vehicles.
- Habitual users broadly agreed about sidewalk riding and improper parking, but differed sharply about the over-abundance of vehicles. They also regarded a lack of lanes for e-scooters/e-bikes as one of the most important issues regarding the shared mobility program.

Figure 14 Average Agreement with Statements About Shared Mobility Program



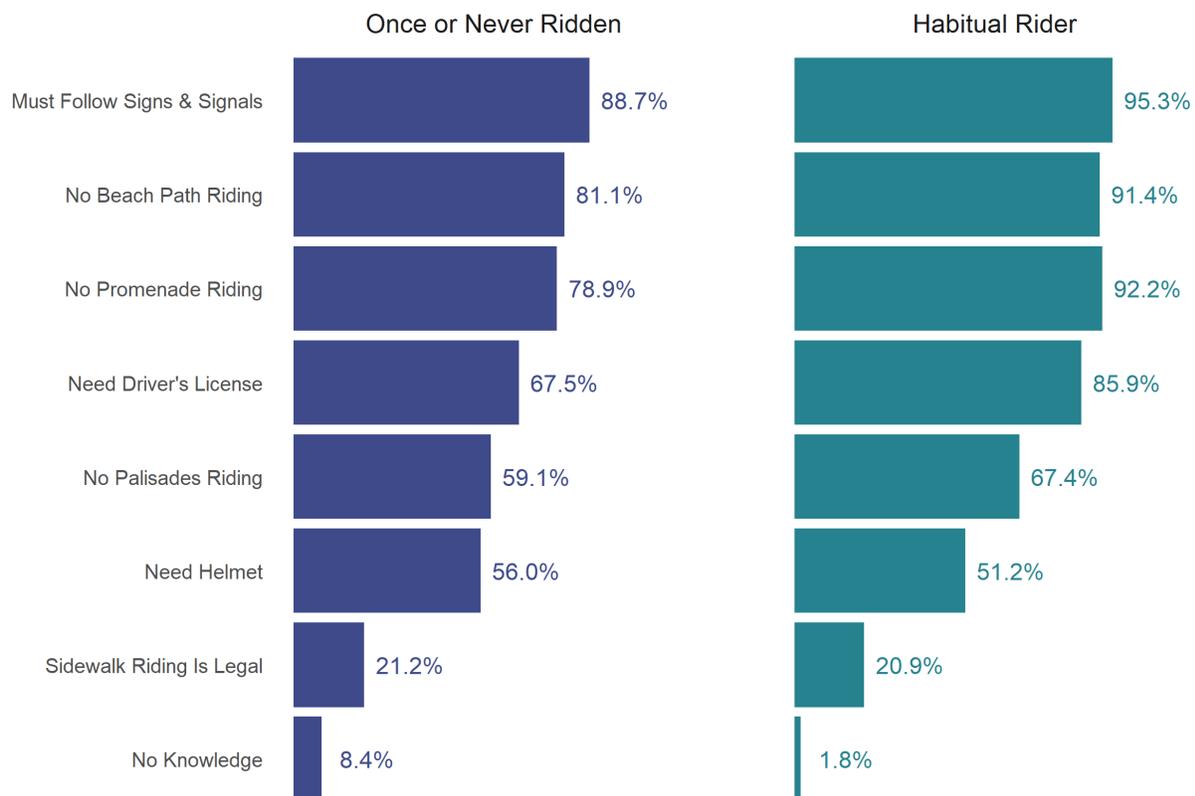
Key Takeaways

- Overall, respondents tend to agree that more enforcement would improve shared mobility use and parking.
- Shared mobility users and non-users differed sharply on a number of issues. While non-users strongly agreed that there are too many e-scooters/e-bikes in Santa Monica, users tended to disagree with this statement.
- Conversely, users strongly agreed that more riding lanes would improve e-scooter/e-bike safety, that shared e-scooters/e-bikes help reduce carbon emissions, and that they are important transportation options. Non-users were neutral or slightly negative toward each of these statements.

What Does the Public Know about Shared Mobility Rules and How Do They Learn It?

Survey respondents were asked whether or not they believed that a given rule applied to shared e-scooter/e-bike users in Santa Monica. Separately, respondents were asked how they have learned about rules for shared mobility users.

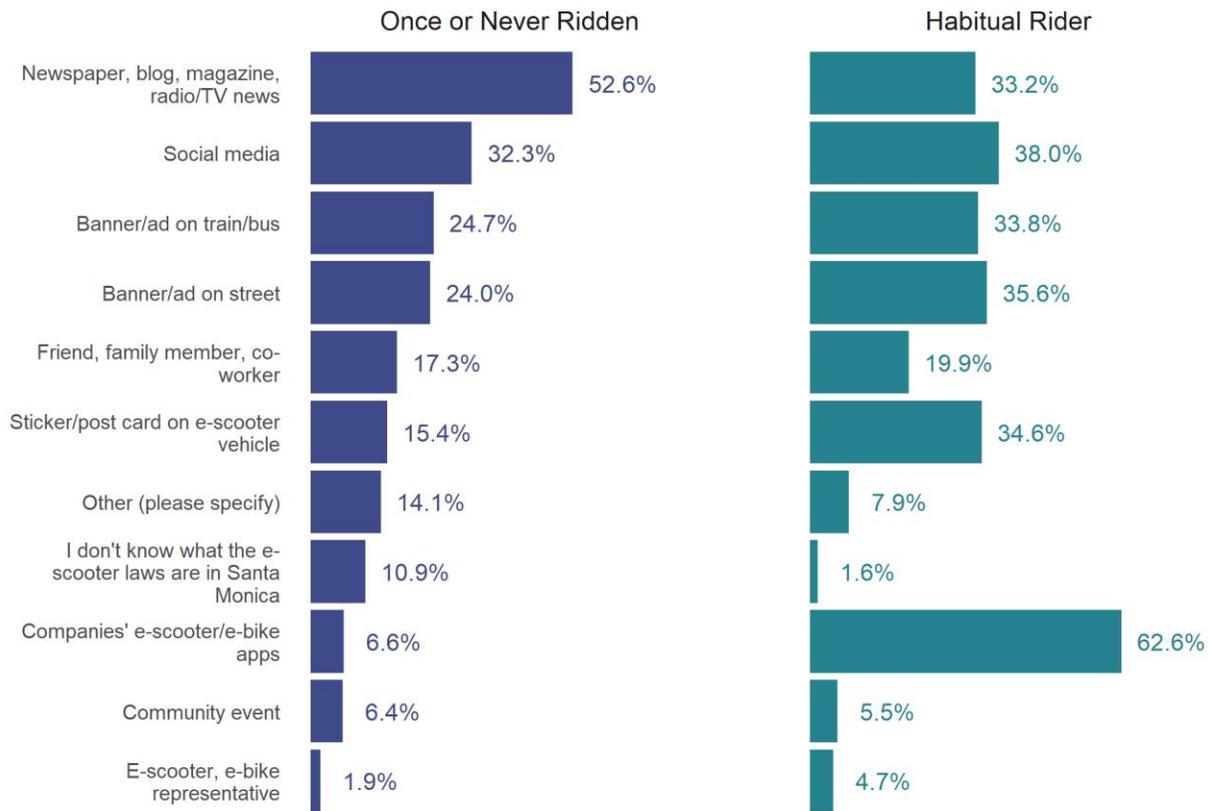
Figure 15 Percentage of Respondents Who Believe that the Following Rules Apply to Shared Mobility Users



Key Takeaways

- Overall, respondents showed a relatively strong grasp of rules, with 80 to 90 percent correctly identifying the applicability of rules mandating following rules of the road and prohibiting Beach Path, Promenade, and sidewalk riding.

Figure 16 Percentage of Respondents Who Report Learning about Shared Mobility Rules from the Following Sources



Key Takeaways

- Uses and non-users displayed a sharp divide in the medium through which they were most likely to learn about e-scooter/e-bike rules – non-users from the news, users from e-scooter/e-bike apps.
- Users were disproportionately likely to learn from public banners and social media.
- Few users or non-users report learning from community events or provider reps.

Santa Monica Shared Mobility Pilot Program Public Survey Responses

Below are the questions asked, and total count and percent of responses.

Where do you live? (Zip Code)

Response	Count	Percent
90401	111	8.8%
90402	75	5.9%
90403	278	22.0%
90404	147	11.7%
90405	457	36.2%
Other	193	15.3%
<i>Total</i>	<i>1,261</i>	<i>100.0%</i>

What is your gender?

Response	Count	Percent
Female	554	53.6%
Male	472	45.7%
Non-Binary	7	0.7%
<i>Total</i>	<i>1,033</i>	<i>100.0%</i>

What is your age?

Response	Count	Percent
18-24	26	2.1%
25-34	189	15.0%
35-44	302	23.9%
45-54	248	19.7%
55-64	234	18.6%
65+	257	20.4%
Under 18	5	0.4%
<i>Total</i>	<i>1,261</i>	<i>100%</i>

What mode(s) of transportation do you use on a weekly basis?

Response	Count	Percent
Walking	1,115	88.4%
Personal Bike	423	33.5%
Breeze/Metro Bike Share	73	5.8%
E-Scooter/E-Bike	241	19.1%
Private Vehicle	1,066	84.5%
Taxi/Ride Share	397	31.5%
Bus	238	18.9%
Light Rail	215	17.0%
<i>Total</i>	<i>1,261</i>	<i>100.0%</i>

On a scale of 1-5, how would you rate the following issues?

Issue	Response	Count	Percent
Too many cars	1 - Not Serious	29	2.3%
	2	70	5.6%
	3	294	23.3%
	4	353	28.0%
	5 - Very Serious	515	40.8%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
Traffic and congestion	1 - Not Serious	13	1.0%
	2	50	4.0%
	3	189	15.0%
	4	386	30.6%
	5 - Very Serious	623	49.4%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
Pollution due to vehicle emissions	1 - Not Serious	57	4.5%
	2	93	7.4%
	3	264	20.9%
	4	297	23.6%
	5 - Very Serious	550	43.6%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
Bike safety	1 - Not Serious	34	2.7%
	2	52	4.1%
	3	197	15.6%
	4	329	26.1%
	5 - Very Serious	649	51.5%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
Pedestrian and sidewalk safety	1 - Not Serious	38	3.0%
	2	50	4.0%
	3	140	11.1%
	4	244	19.3%

	5 - Very Serious	789	62.6%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
Mobility access for people with disabilities	1 - Not Serious	60	4.8%
	2	74	5.9%
	3	267	21.2%
	4	302	23.9%
	5 - Very Serious	558	44.3%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
Availability of transportation options	1 - Not Serious	148	11.7%
	2	167	13.2%
	3	319	25.3%
	4	238	18.9%
	5 - Very Serious	389	30.8%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>

Have you ever ridden a shared e-scooter or e-bike in Santa Monica?

Response	Count	Percent
I've never ridden a shared e-scooter or e-bike	666	52.8%
I've only ridden once	212	16.8%
I ride a few times a month	257	20.4%
I ride daily	20	1.6%
I ride several times a week	106	8.4%
<i>Total</i>	<i>1,261</i>	<i>100.0%</i>

On a scale of 1 – 5, how would you rate shared mobility services' (e-scooters and e-bikes) impact on transportation in Santa Monica?

Response	Count	Percent
1 - Very unfavorable	505	40.0%
2	206	16.3%
3	218	17.3%
4	132	10.5%
5 - Very favorable	200	15.9%
<i>Total</i>	<i>1,261</i>	<i>100.0%</i>

To your knowledge, which of the following rules apply to e-scooters/e-bikes in Santa Monica?

Response	Count	Percent
Need Driver's License	922	73.1%
Need Helmet	688	54.6%
Sidewalk Riding Is Legal	266	21.1%
No Beach Path Riding	1062	84.2%
No Promenade Riding	1046	83.0%
No Palisades Riding	777	61.6%
Must Follow Signs & Signals	1,144	90.7%
No Knowledge	81	6.4%
<i>Total</i>	<i>1,261</i>	<i>100.0%</i>

How did you learn about e-scooter/e-bike rules in Santa Monica?

Response	Count	Percent
Companies' e-scooter/e-bike apps	297	23.6%
Community event	77	6.1%
Banner/ad on street	347	27.5%
Banner/ad on train/bus	346	27.5%
Sticker/post card on e-scooter vehicle	267	21.2%
Social media	429	34.0%
Newspaper, blog, magazine, radio/TV news	589	46.7%
Friend, family member, co-worker	228	18.1%
E-scooter, e-bike representative	35	2.8%
I don't know what the e-scooter laws are in Santa Monica	102	8.1%
Other (please specify)	154	12.2%
<i>Total</i>	<i>1,260</i>	<i>100.0%</i>

In your opinion has the operations and use of e-scooters/e-bikes improved since last summer (2018) in Santa Monica?

Response	Count	Percent
No	775	61.5%
Yes	486	38.5%
<i>Total</i>	<i>1,261</i>	<i>100.0%</i>

Have you seen the following?

Response	Count	Percent
Signage about rules/riding etiquette	841	67.0%
Electronic traffic message boards	241	19.2%
SaMo Police stops	215	17.1%
Operator staff organizing, cleaning, maintaining fleet	371	29.6%
Operator staff doing outreach and education	68	5.4%
Operator sponsored ad campaigns about rules/riding etiquette	166	13.2%
I have not seen any of these things	317	25.3%
<i>Total</i>	<i>1255</i>	<i>100.0%</i>

How would you rate each of the following statements? E-scooter/ e-bike riders:

Statement	Response	Count	Percent
Park responsibly	Always	35	2.8%
	Mostly	214	17.0%
	Never	345	27.4%
	Sometimes	665	52.8%
	<i>Total</i>	<i>1,259</i>	<i>100.0%</i>
Ride on sidewalks	Always	205	16.4%
	Mostly	420	33.5%
	Never	47	3.8%
	Sometimes	581	46.4%
	<i>Total</i>	<i>1,253</i>	<i>100.0%</i>
Ride in bike lanes when a lane is present	Always	126	10.0%
	Mostly	431	34.3%
	Never	23	1.8%
	Sometimes	675	53.8%
	<i>Total</i>	<i>1,255</i>	<i>100.0%</i>
Ride one person per device	Always	75	6.0%
	Mostly	598	47.5%
	Never	21	1.7%
	Sometimes	565	44.9%
	<i>Total</i>	<i>1,259</i>	<i>100.0%</i>
Appear to be of legal riding age	Always	84	6.7%
	Mostly	518	41.4%
	Never	41	3.3%
	Sometimes	607	48.6%
	<i>Total</i>	<i>1,250</i>	<i>100.0%</i>

	Always	45	3.6%
	Mostly	227	18.0%
Follow the rules of the road	Never	334	26.5%
	Sometimes	653	51.9%
	<i>Total</i>	<i>1259</i>	<i>100.0%</i>

Please rate in order of priority which of the following statements regarding e-scooters/ e-bikes are the most important to address?

Response	Average Rating: 1 = Highest Priority, 9 = Lowest Priority
E-scooters/e-bikes are improperly parked	3.3
Too many e-scooters/e-bikes	4.4
Riders on sidewalks	2.8
Insufficient lanes for riding e-scooters/e-bikes	4.9
Multiple riders per device	4.9
Under-age riders	4.9
Fluctuating or increasing riding fees and rates	6.8
Discounts for low-income individuals	6.7
E-scooter/e-bike maintenance	6.2

How would you rate each of the following statements?

Statement	Response	Count	Percent
Shared e-scooters/e-bikes are important transportation options	1 - Complete Disagreement	280	22.2%
	2	214	17.0%
	3 - Neutral	206	16.3%
	4	222	17.6%
	5 - Complete Agreement	339	26.9%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
Shared e-scooters/e-bikes help reduce carbon emissions	1 - Complete Disagreement	177	14.0%
	2	152	12.1%
	3 - Neutral	296	23.5%
	4	267	21.2%
	5 - Complete Agreement	369	29.3%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
There are too many e-scooters/e-bikes in Santa Monica	1 - Complete Disagreement	177	14.0%
	2	93	7.4%

	3 - Neutral	169	13.4%
	4	157	12.5%
	5 - Complete Agreement	665	52.7%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
	1 - Complete Disagreement	156	12.4%
	2	92	7.3%
There are too many shared e-scooters/e-bikes service providers	3 - Neutral	298	23.6%
	4	148	11.7%
	5 - Complete Agreement	567	45.0%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
	1 - Complete Disagreement	151	12.0%
	2	171	13.6%
Designated e-scooter/e-bike parking areas will improve haphazard parking	3 - Neutral	224	17.8%
	4	364	28.9%
	5 - Complete Agreement	351	27.8%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
	1 - Complete Disagreement	222	17.6%
	2	203	16.1%
Prohibited riding areas and designated parking zones improve rider behavior in sensitive areas	3 - Neutral	254	20.1%
	4	273	21.6%
	5 - Complete Agreement	309	24.5%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
	1 - Complete Disagreement	82	6.5%
	2	86	6.8%
Additional enforcement would improve e-scooter/e-bike rider behavior and parking	3 - Neutral	127	10.1%
	4	228	18.1%
	5 - Complete Agreement	738	58.5%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
	1 - Complete Disagreement	179	14.2%
	2	132	10.5%
More riding lanes will improve e-scooter/e-bike safety	3 - Neutral	295	23.4%
	4	249	19.7%
	5 - Complete Agreement	406	32.2%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>
	1 - Complete Disagreement	123	9.8%
	2	110	8.7%
There should be more public control of shared mobility operations in Santa Monica	3 - Neutral	444	35.2%
	4	209	16.6%
	5 - Complete Agreement	375	29.7%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>

	1 - Complete Disagreement	190	15.1%
	2	114	9.0%
Fares to use e-scooter/e-bikes should be managed to provide equitable access	3 - Neutral	541	42.9%
	4	200	15.9%
	5 - Complete Agreement	216	17.1%
	<i>Total</i>	<i>1,261</i>	<i>100.0%</i>