



City of Santa Monica
Shared Mobility Device Pilot Program
User Survey Results
Conducted 01-25-2019 to 02-15-2019

May 8, 2019

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User 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. The primary goal of the program is to inform the development of long-term policy solutions to expand sustainable mobility options equitably while protecting public safety on city streets and sidewalks.

As a part of the program the City worked with the four permitted operators to conduct a survey of the shared mobility users in order to better understand: who are the users of these systems; where, why, and how often they ride; are the shared mobility trips displacing trips by other modes of transportation; and how familiar are they with the rules/ etiquette of riding shared mobility devices.

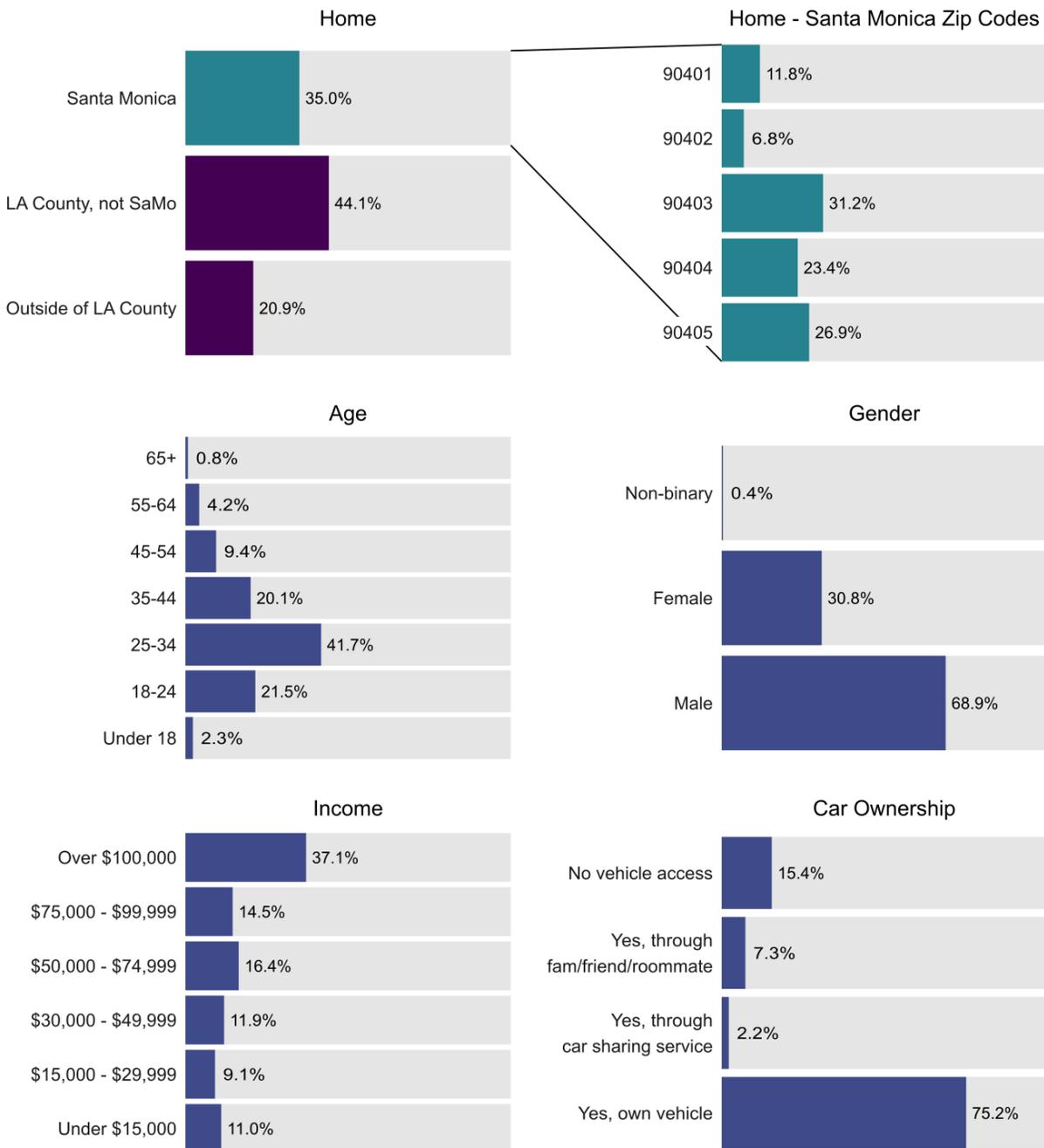
The user survey was created and hosted by the City, and was open to responses from January 25, 2019 to February 15, 2019. All four permitted operators distributed the survey through email newsletters, email blasts, and/or in-app pop-ups. A total of 4,700 users self-selected to respond to the survey, with approximately 3,000 completing all 21 questions. No rewards or incentives were offered to respondents of the survey. Users that responded to be under the age of 18 (Question 3), or to have never ridden a shared mobility device (Question 7), were not permitted to complete the other survey questions.

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

Who is Riding Shared Mobility in Santa Monica?

Respondents were asked about their age, gender, income, home location, and car ownership.

Figure 1 Respondent Attribute Summary: Percentage among all survey respondents*



*Missing and non-valid responses are not figured in these or subsequent percentages

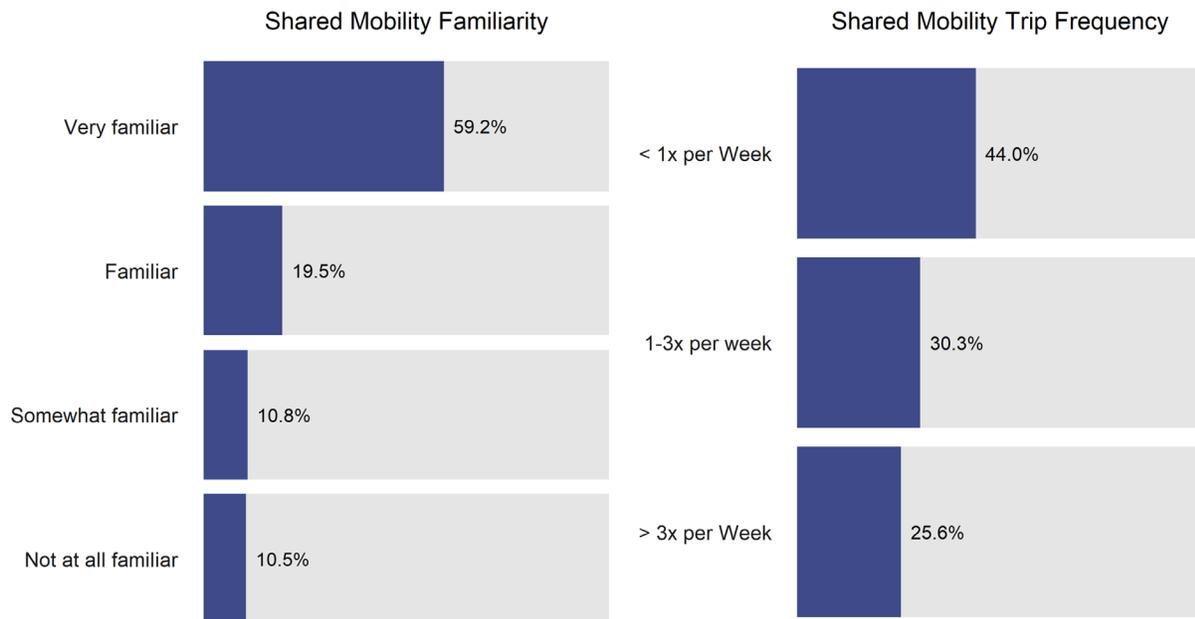
Key Takeaways

- Overall shared mobility ridership skews young, male, and affluent.
- Of respondents to the survey, 35 percent were residents of Santa Monica, and 44 percent were residents of other LA County areas. Out-of-county riders make up 21 percent of total respondents.

Travel Habits and Travel Behavior

Respondents were asked about their familiarity with the Shared Mobility Program, how often they use e-scooters and e-bikes, the purpose of their last shared mobility trip, what mode would have been taken in place of their last shared mobility trip, and to assess changes in their travel behavior/mode preferences since beginning to use shared mobility services.

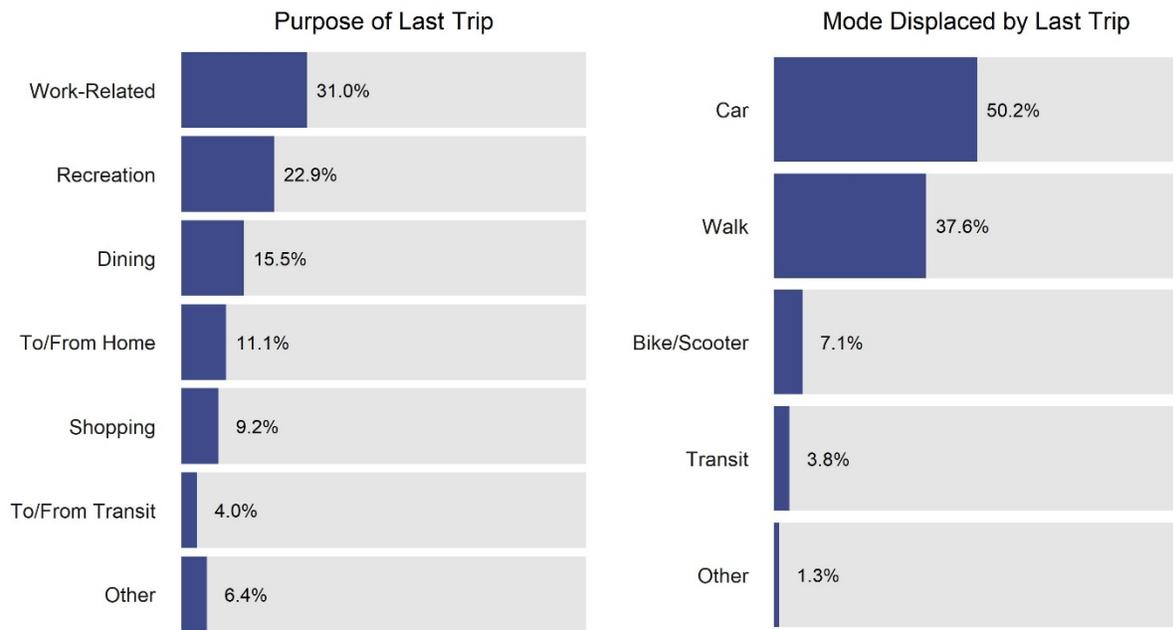
Figure 2 Travel Habits and Travel Behavior: Program familiarity and user frequency



Key Takeaways

- A slight majority (59 percent) of respondents reported to be “very familiar” with the shared scooters/bikes.
- A slight majority (56 percent) of respondents reported to take at least one shared mobility trip per week. 26 percent of respondents reported to take more than 3 trips per week.

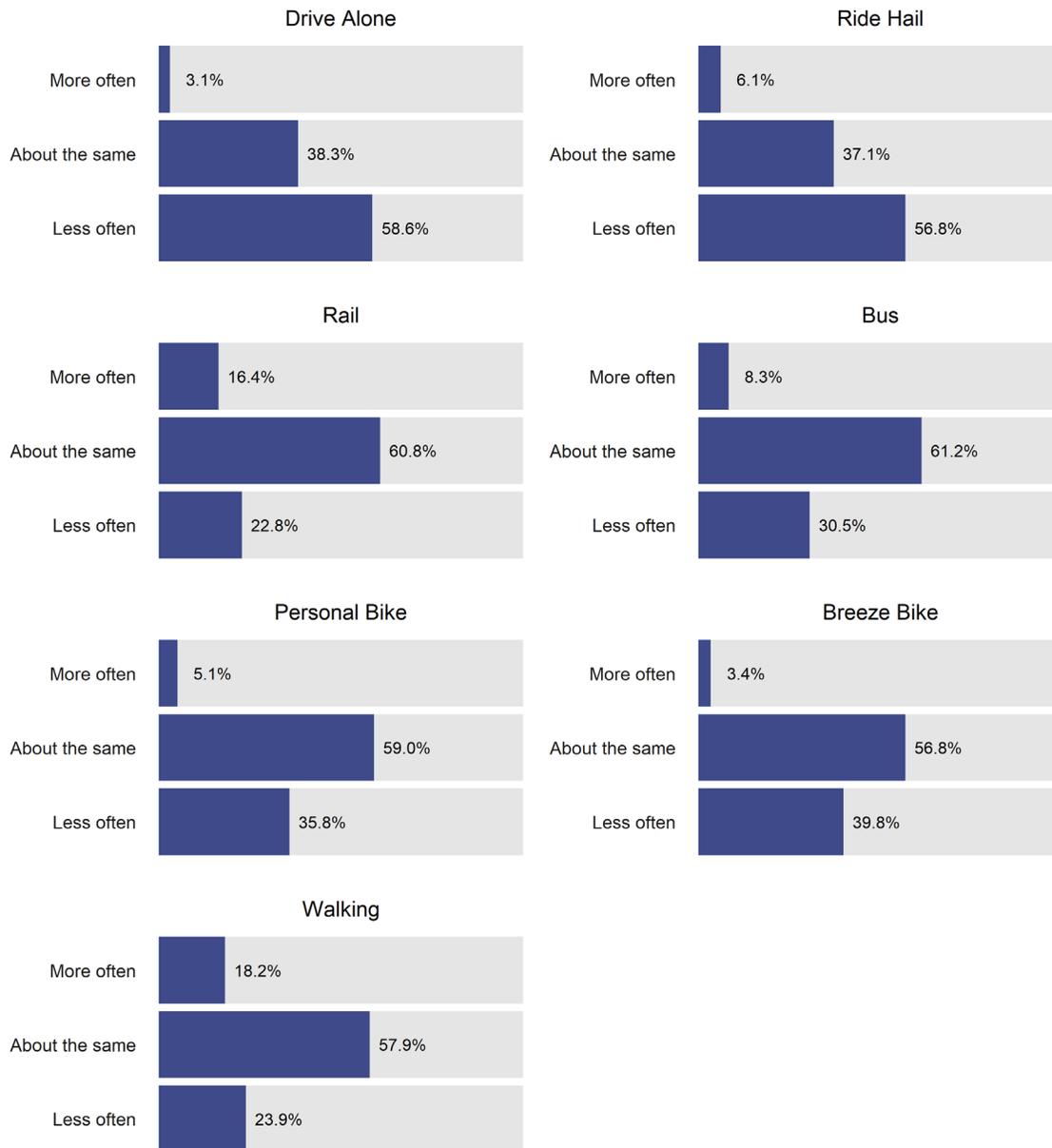
Figure 3 Travel Habits and Travel Behavior: Purpose of last trip and mode displacement



Key Takeaways

- Respondents reported taking shared mobility trips for a wide range of purposes. Work and recreation trips (31 percent and 23 percent respectively) were the most commonly reported trips.
- Respondents reported that 50 percent of their most recent shared mobility trips displaced a car trip (including drive alone, ride share services, taxi, etc.). While 38 percent of shared mobility trips displace a walking trip.

Figure 4 Travel Habits and Travel Behavior: Respondent assessment in changes of other travel modes since beginning to use shared mobility services



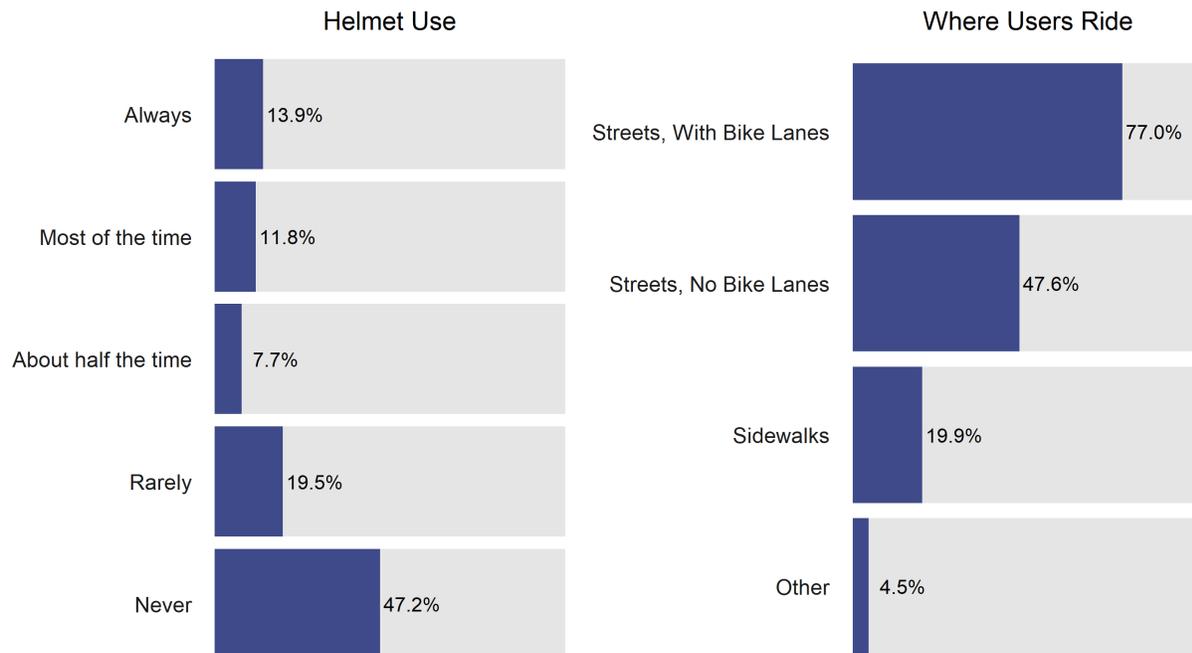
Key Takeaways

- A majority of respondents say that they've been using car modes less.
- A majority of respondents say that their transit use is unchanged, though among those who report changes, more say they take transit less often. This trend is more pronounced for bus than for rail.
- Compared to other the other modes, respondents reported a notable increase in walking and rail transit use (18 percent and 16 percent respectively) since taking up shared scooters/bikes.

Knowledge and Observance of the Rules of the Road

Respondents were asked about their knowledge of the rules of the road, where they typically ride, and barriers to use.

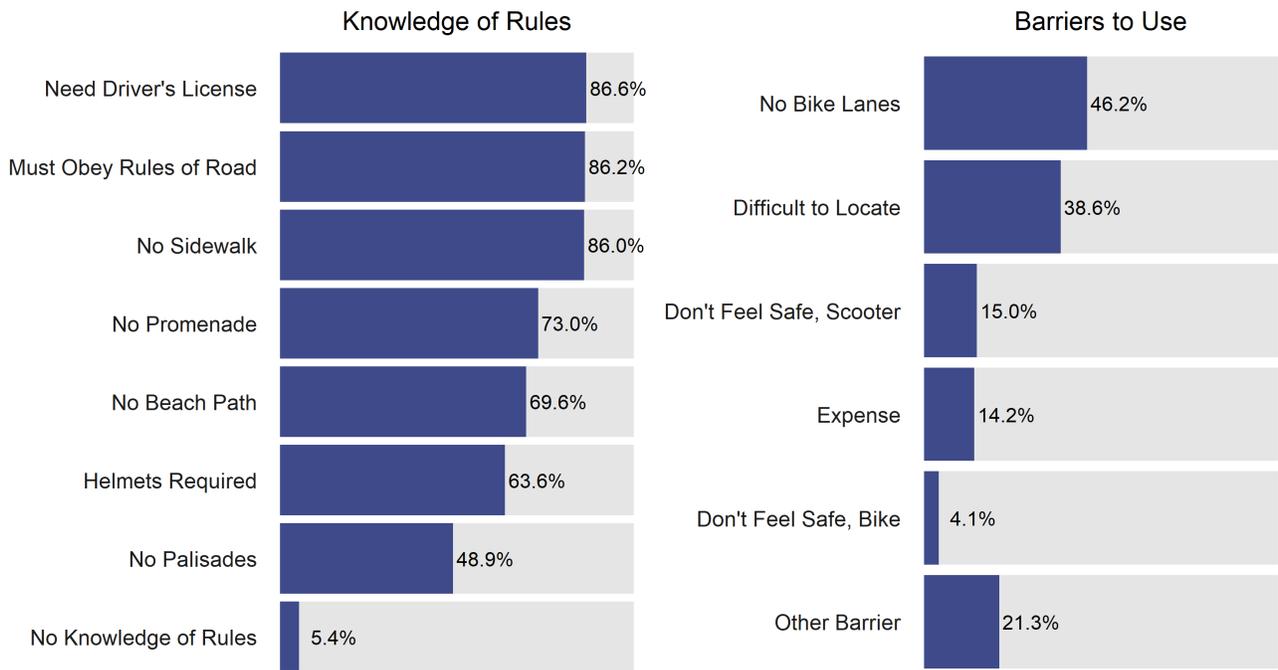
Figure 5 Safety, Rule Understanding, and Rule Following: Helmet Use and riding venue



Key Takeaways

- 67 percent of respondents report rarely or never wearing helmets while they ride.
- 77 percent of respondents report riding on streets with bike lanes, about half (48 percent) report riding on streets without bike lanes, and 20 percent report riding on sidewalks.

Figure 6 Safety, Rule Understanding, and Rule Following: Knowledge of Rules, and Barriers to More Frequent Shared Mobility Use



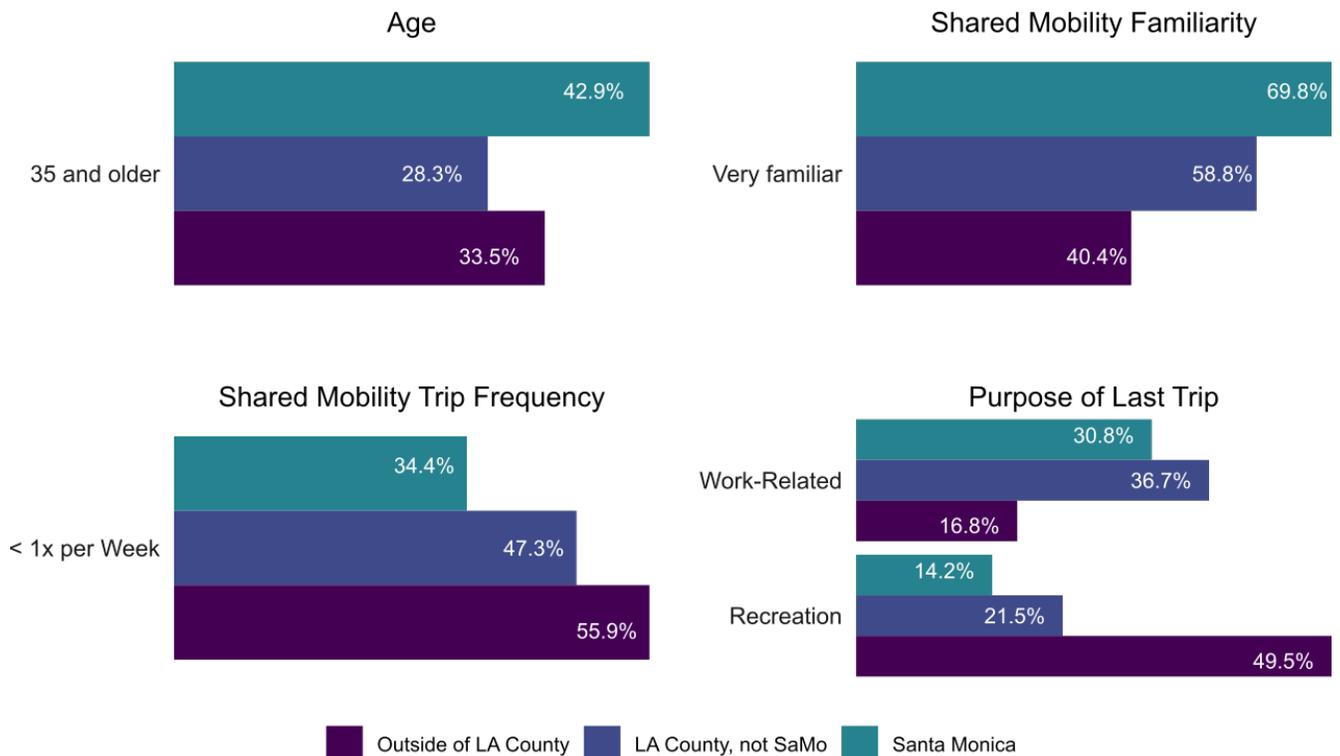
Key Takeaways

- A large majority of respondents (86 percent) say that they know that shared mobility users must follow the rules of the road and aren't allowed on sidewalks.
- A smaller majority recognize that shared mobility devices aren't allowed on the Promenade or Beach Path (73 percent and 70 percent respectively); slightly less than half report knowing that shared scooters/bikes aren't allowed in Palisades Park.

Differences among Respondents from Santa Monica, non-Santa Monica LA County, and Outside of LA County

Question responses were examined by the respondents home locations in order to understand the differences in how Santa Monica residents, LA County (outside Santa Monica), and visitors to the area use the shared mobility systems.

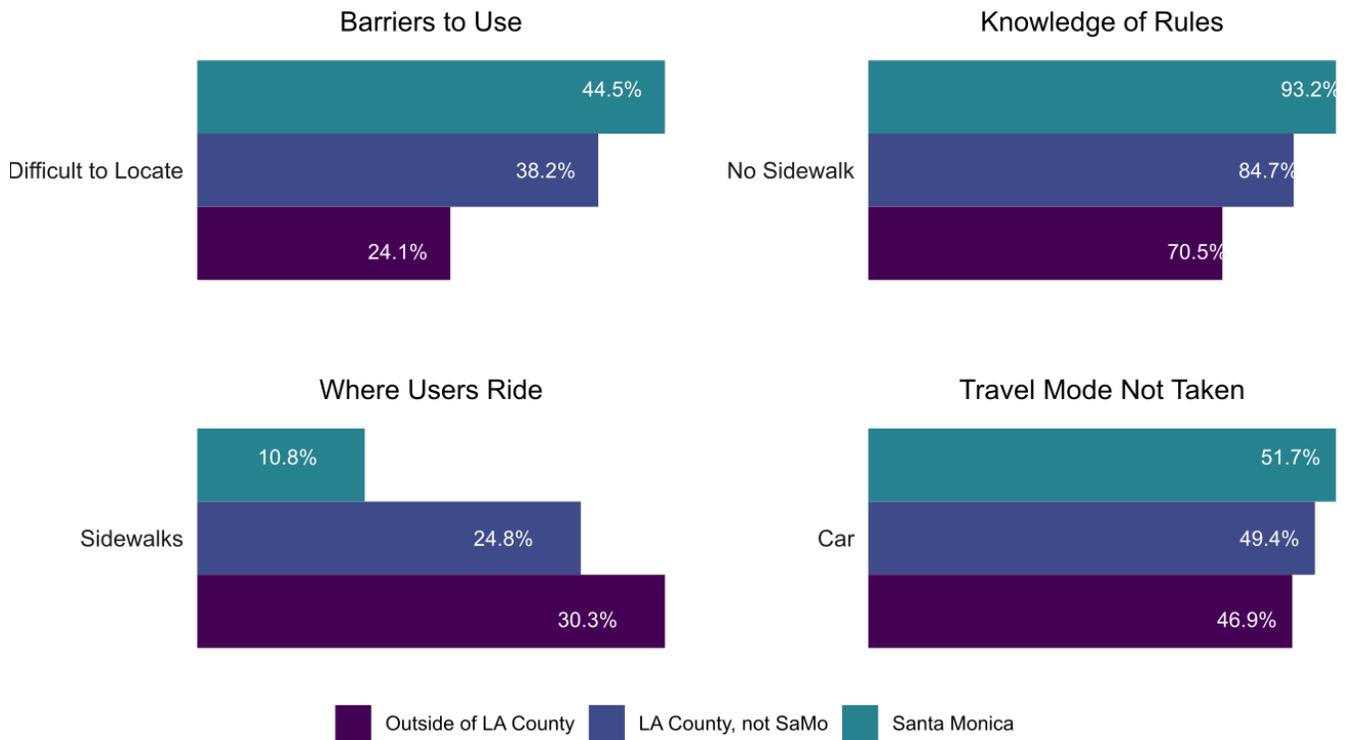
Figure 7 Differences among Santa Monica, LA County, and Visitor Respondents: Age, program familiarity, user frequency, and trip purpose



Key Takeaways

- Santa Monica resident users are more likely to be 35 years-of-age or older and more familiar with the shared mobility pilot program than non-residents.
- Visitors from outside of LA County are the least familiar with the shared mobility program, most likely to use shared mobility devices less than once per week, and most likely to ride for recreation, with recreational trips comprising 50 percent of overall trips for out-of-county users.

Figure 8 Differences among Santa Monica, LA County, and Visitor Respondents: Knowledge of rules, barriers to use, riding venue, and mode displacement



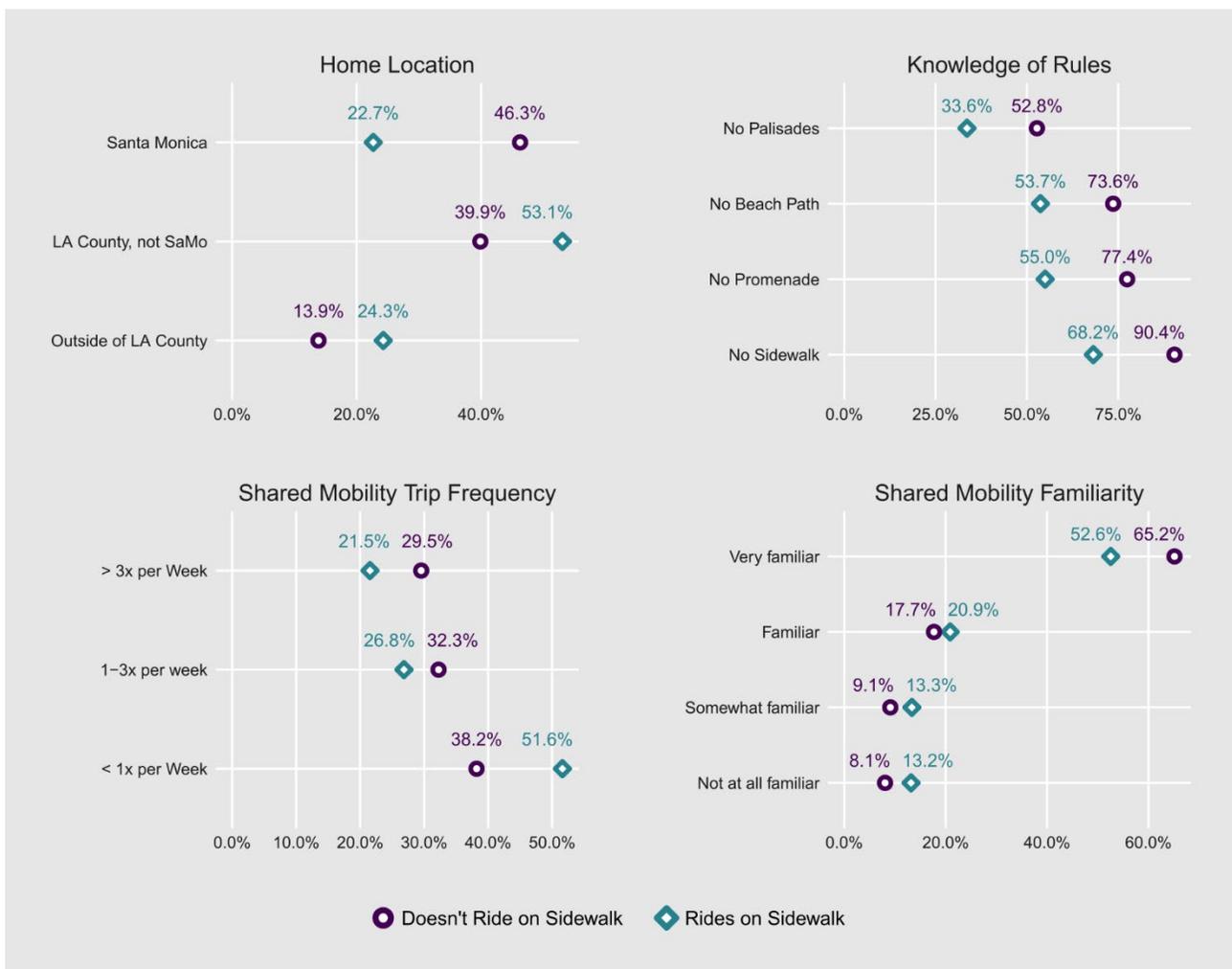
Key Takeaways

- Out-of-county users are also less likely to know that shared mobility devices aren't allowed on sidewalks, and more likely to ride them on sidewalks. On both accounts, Santa Monica residents better understand and follow the *No Sidewalk Riding* rule than non-Santa Monica LA County residents.
- Santa Monica residents are most likely to cite difficulty in locating a vehicle as a barrier to their use of shared mobility devices.
- Across all home locations, about half of shared mobility trips were reported to have displaced car trips (including drive alone, ride share services, taxi, etc.), but this number is highest for Santa Monica residents.

Differences among Respondents Who Report Riding on the Sidewalk and Those Who Do Not

Question responses were examined by whether or not respondents reported riding on the sidewalk.

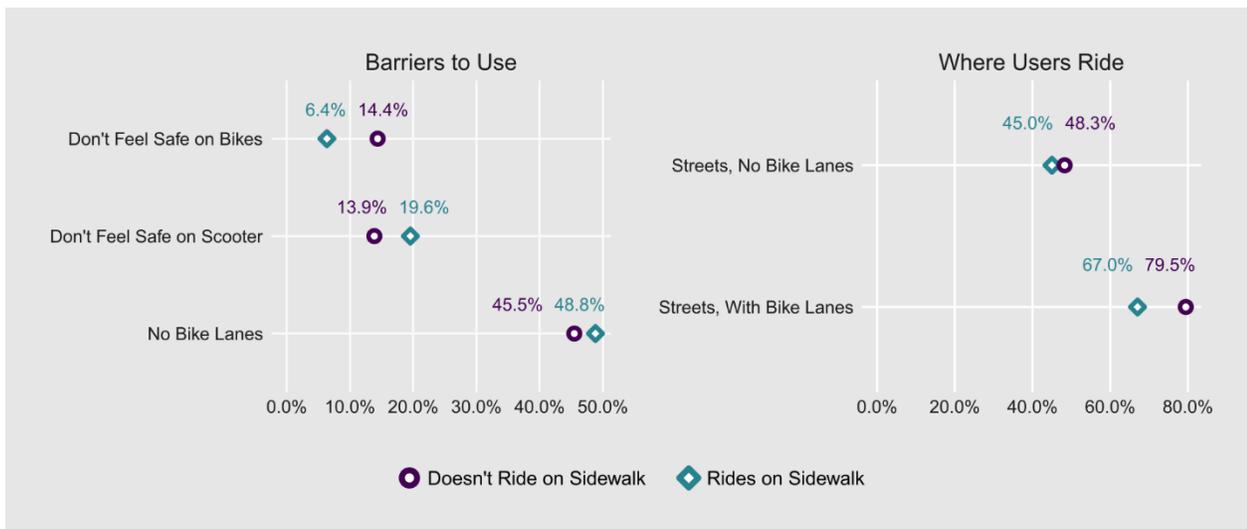
Figure 9 Differences between Respondents Who Report Riding on the Sidewalk and Those Who Do Not: Home location, program familiarity, knowledge of rules, and use frequency



Key Takeaways

- Respondents that reported riding on the sidewalk are likely to come from outside of Santa Monica, either from within LA County (53 percent) or from outside of LA County (24 percent).
- Respondents that reported riding on the sidewalk are less likely to know that sidewalk riding is prohibited, but also much less likely to know about other prohibited riding locations.
- Sidewalk riders are more likely to use shared mobility services infrequently, and less likely to report familiarity with the program.

Figure 10 Differences between Respondents Who Report Riding on the Sidewalk and Those Who Do Not: Barriers to use, riding venue



Key Takeaways

- Respondents that reported riding on the sidewalk and respondents that did not are both likely to cite the absence of bike lanes as a barrier to use.
- Respondents had the option of designating multiple places where they ride. Those who said they ride on sidewalks and those who did not were similarly likely to say that they also ride on streets *without* bike lanes. Sidewalk riders, however, were less likely to say that they also ride on streets *with* bike lanes.

Santa Monica Share Mobility Pilot Program User Survey Responses

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

Where do you live?

Response	Count	Percent
LA County, not SaMo	2099	44.1%
Outside of LA County	993	20.9%
Santa Monica	1668	35.0%
90401	173	3.6%
90402	100	2.1%
90403	459	9.6%
90404	344	7.2%
90405	396	8.3%
Other Santa Monica	196	4.1%
<i>Total</i>	<i>4760</i>	<i>100.0%</i>

What is your income?

Response	Count	Percent
Under \$15,000	413	9.6%
Between \$15,000 and \$29,999	341	7.9%
Between \$30,000 and \$49,999	446	10.3%
Between \$50,000 and \$74,999	615	14.3%
Between \$75,000 and \$99,999	545	12.6%
More than \$100,000	1392	32.3%
Prefer not to say	561	13.0%
<i>Total</i>	<i>4313</i>	<i>100.0%</i>

What is your gender?

Response	Count	Percent
Female	1171	30.8%
Male	2621	68.9%
Non-Binary	14	0.4%
<i>Total</i>	<i>3806</i>	<i>100.0%</i>

What is your age?

Response	Count	Percent
Under 18	107	2.3%
18-24	1003	21.5%
25-34	1948	41.7%
35-44	936	20.1%
45-54	440	9.4%
55-64	198	4.2%
65+	36	0.8%
<i>Total</i>	<i>4668</i>	<i>100.0%</i>

Do you have access to a motor vehicle?

Response	Count	Percent
Yes, own vehicle	3149	75.2%
Yes, through car sharing service	91	2.2%
Yes, through fam/friend/roommate	305	7.3%
No vehicle access	645	15.4%
<i>Total</i>	<i>4190</i>	<i>100.0%</i>

How familiar are you with shared mobility program?

Response	Count	Percent
Very familiar	2555	59.2%
Familiar	839	19.5%
Somewhat familiar	467	10.8%
Not at all familiar	452	10.5%
<i>Total</i>	<i>4313</i>	<i>100.0%</i>

Which brands of shared e-scooter/e-bike have your ridden?

Response	Count	Percent
Bird	3739	86.7%
Jump Scooter	1215	28.2%
Jump Bike	1146	26.6%
Lime	2391	55.4%
Lyft	1536	35.6%
None	68	1.6%
Unsure	85	2.0%
<i>Total</i>	<i>4313</i>	<i>100.0%</i>

In the past month, how often have your ridden shared e-scooter/e-bike?

Response	Count	Percent
< 1x per Week	1815	44.0%
1-3x per week	1250	30.3%
> 3x per Week	1057	25.6%
<i>Total</i>	<i>4122</i>	<i>100.0%</i>

What mode would you have used for your last trip if not for shared e-scooter/e-bike?

Response	Count	Percent
Drive Alone	666	21.3%
Other Car	898	28.7%
Transit	120	3.8%
Bike/Scooter	227	7.3%
Walk	1178	37.6%
Other	41	1.3%
<i>Total</i>	<i>3130</i>	<i>100.0%</i>

Since first using e-scooters/e-bikes, how has your walking frequency changed?

Response	Count	Percent
Less often	743	23.9%
About the same	1800	57.9%
More often	565	18.2%
<i>Total</i>	<i>3108</i>	<i>100.0%</i>

Since first using e-scooters/e-bikes, how has your personal biking frequency changed?

Response	Count	Percent
Less often	1077	35.8%
About the same	1774	59.0%
More often	154	5.1%
<i>Total</i>	<i>3005</i>	<i>100.0%</i>

Since first using e-scooters/e-bikes, how has your Breeze biking frequency changed?

Response	Count	Percent
Less often	1126	39.8%
About the same	1606	56.8%
More often	96	3.4%
<i>Total</i>	<i>2828</i>	<i>100.0%</i>

Since first using e-scooters/e-bikes, how has your solo driving frequency changed?

Response	Count	Percent
Less often	1795	58.6%
About the same	1172	38.3%
More often	95	3.1%
<i>Total</i>	<i>3062</i>	<i>100.0%</i>

Since first using e-scooters/e-bikes, how has your ride hailing frequency changed?

Response	Count	Percent
Less often	1738	56.8%
About the same	1135	37.1%
More often	188	6.1%
<i>Total</i>	<i>3061</i>	<i>100.0%</i>

Since first using e-scooters/e-bikes, how has your rail transit frequency changed?

Response	Count	Percent
Less often	684	22.8%
About the same	1821	60.8%
More often	491	16.4%
<i>Total</i>	<i>2996</i>	<i>100.0%</i>

Since first using e-scooters/e-bikes, how has your bus transit frequency changed?

Response	Count	Percent
Less often	907	30.5%
About the same	1821	61.2%
More often	246	8.3%
<i>Total</i>	<i>2974</i>	<i>100.0%</i>

For your most recent trip, how did you get to the e-scooter/e-bike?

Response	Count	Percent
Breeze Bike Share	10	0.3%
Carpool/Vanpool	42	1.3%
Drive Alone	92	2.9%
Other	20	0.6%
Own personal bike	29	0.9%
Public Transit - Rail	97	3.1%
Public Transit – Bus	39	1.2%
Ride Hail	36	1.2%
Walk	2765	88.3%
<i>Total</i>	<i>3130</i>	<i>100.0%</i>

What was the purpose of your most recent e-scooter/e-bike trip?

Response	Count	Percent
Child care	21	0.7%
Eating out	469	15.0%
Healthcare	75	2.4%
Other activities	97	3.1%
Recreation/Fun	696	22.2%
School-related	96	3.1%
Shopping	279	8.9%
To/from transit	120	3.8%
To/From Home	336	10.7%
Work-related	941	30.1%
<i>Total</i>	<i>3130</i>	<i>100.0%</i>

How often do you wear a helmet when riding an e-scooter/e-bike?

Response	Count	Percent
Never	1478	47.2%
Rarely	610	19.5%
About half the time	240	7.7%
Most of the time	368	11.8%
Always	434	13.9%
<i>Total</i>	<i>3130</i>	<i>100.0%</i>

Which of the following rules apply to use of e-scooters/e-bikes?

Response	Count	Percent
Driver's license required	2711	86.6%
Helmets required	1992	63.6%
No sidewalk riding	2691	86.0%
No beach path riding	2180	69.6%
No Promenade riding	2284	73.0%
No Palisades riding	1532	48.9%
Must follow rules of road	2699	86.2%
No knowledge of rules	169	5.4%
<i>Total</i>	<i>3130</i>	<i>100.0%</i>

What barriers prevent you from using e-scooters/e-bikes in Santa Monica as much as you'd like?

Response	Count	Percent
Expense	426	16.7%
Difficult to locate	1156	45.2%
No bike lanes	1382	54.1%
Don't feel safe, scooter	449	17.6%
Don't feel safe, bikes	124	4.9%
<i>Total</i>	<i>2556</i>	<i>100.0%</i>

How would you rate the follow brands for availability?

Provider	Rating	Count	Percent
Bird	1	128	4.3%
	2	139	4.7%
	3	428	14.5%
	4	853	28.9%
	5	1406	47.6%
	<i>Total</i>	<i>2954</i>	<i>100.0%</i>
Jump Bike	1	158	9.6%
	2	162	9.8%
	3	312	18.9%
	4	435	26.4%
	5	582	35.3%
	<i>Total</i>	<i>1649</i>	<i>100.0%</i>
Jump Scooter	1	208	12.0%
	2	208	12.0%
	3	410	23.7%
	4	464	26.9%
	5	437	25.3%
	<i>Total</i>	<i>1727</i>	<i>100.0%</i>
Lime	1	171	7.1%
	2	171	7.1%
	3	457	19.0%
	4	749	31.2%
	5	855	35.6%

	<i>Total</i>	<i>2403</i>	<i>100.0%</i>
Lyft	1	209	10.9%
	2	277	14.4%
	3	556	29.0%
	4	472	24.6%
	5	404	21.1%
	<i>Total</i>	<i>1918</i>	<i>100.0%</i>

How would you rate the following brands for customer service?

Provider	Rating	Count	Percent
Bird	1	199	6.8%
	2	303	10.4%
	3	681	23.4%
	4	827	28.4%
	5	902	31.0%
	<i>Total</i>	<i>2912</i>	<i>100.0%</i>
Jump Bike	1	129	8.4%
	2	75	4.9%
	3	156	10.2%
	4	396	25.9%
	5	773	50.6%
	<i>Total</i>	<i>1529</i>	<i>100.0%</i>
Jump Scooter	1	137	8.8%
	2	114	7.3%
	3	231	14.8%
	4	476	30.5%
	5	601	38.6%
	<i>Total</i>	<i>1559</i>	<i>100.0%</i>
Lime	1	191	8.4%
	2	227	9.9%
	3	496	21.7%
	4	737	32.3%
	5	632	27.7%
	<i>Total</i>	<i>1744</i>	<i>100.0%</i>
Lyft	1	142	8.1%
	2	134	7.7%
	3	289	16.6%
	4	544	31.2%
	5	635	36.4%
	<i>Total</i>	<i>1744</i>	<i>100.0%</i>

How would you rate the follow brands for maintenance?

Provider	Rating	Count	Percent
Bird	1	183	7.5%
	2	128	5.2%
	3	306	12.5%
	4	571	23.3%
	5	1267	51.6%
	<i>Total</i>	<i>2455</i>	<i>100.0%</i>
Jump Bike	1	164	15.2%
	2	88	8.1%
	3	161	14.9%
	4	246	22.7%
	5	423	39.1%
	<i>Total</i>	<i>1082</i>	<i>100.0%</i>
Jump Scooter	1	175	15.7%
	2	82	7.4%
	3	187	16.8%
	4	250	22.5%
	5	419	37.6%
	<i>Total</i>	<i>1113</i>	<i>100.0%</i>
Lime	1	222	13.1%
	2	139	8.2%
	3	275	16.3%
	4	418	24.7%
	5	635	37.6%
	<i>Total</i>	<i>1689</i>	<i>100.0%</i>
Lyft	1	182	14.2%
	2	83	6.5%
	3	205	15.9%
	4	308	24.0%
	5	508	39.5%
	<i>Total</i>	<i>1286</i>	<i>100.0%</i>

Appendix A: The Survey Instrument

Help the City of Santa Monica evaluate the Shared Mobility Pilot Program by taking this short survey to tell about your experience in using shared e-scooter and e-bike services in Santa Monica.

* 1. Where do you live?

- Outside of LA County
- LA County other than Santa Monica
- Santa Monica (Please enter your home Zip Code)

* 2. I identify my gender as...

- Prefer not to say
- I identify my gender as (please fill in the blank)...

* 3. What is your age?

- | | |
|--------------------------------|---|
| <input type="radio"/> Under 18 | <input type="radio"/> 45-54 |
| <input type="radio"/> 18-24 | <input type="radio"/> 55-64 |
| <input type="radio"/> 25-34 | <input type="radio"/> 65+ |
| <input type="radio"/> 35-44 | <input type="radio"/> Prefer not to say |

* 4. What is your income?

- Under \$15,000
- Between \$15,000 and \$29,999
- Between \$30,000 and \$49,999
- Between \$50,000 and \$74,999
- Between \$75,000 and \$99,999
- More than \$100,000
- Prefer not to say

* 5. Do you own or have access to a motor vehicle (like a car, van, truck, or motorcycle) that you can drive?

- Yes, my own vehicle
- Yes, through a family member/friend/roommate
- Yes, through a car sharing service like Car2Go, IONIC, or Zipcar
- No, I don't have regular access to a motor vehicle that I can drive
- Prefer not to say

* 6. The City of Santa Monica began a shared mobility pilot with shared e-scooter (Bird, Jump, Lime, Lyft) and shared e-bike (Jump). How familiar would you say you are with this program?

- Very familiar
- Familiar
- Somewhat familiar
- Not at all familiar

* 7. Which brand(s) of e-scooter/e-bike have you ridden in Santa Monica? (Select all that apply)

- Bird
- Jump e-scooter
- Jump e-bike
- Lime
- Lyft
- I have never ridden an e-scooter/e-bike
- Not sure

* 8. In the past month, how often do you ride a shared e-scooter/e-bike?

More than 1x per day

Occasionally, but less than once per week

1-3x per week

I've never ridden e-scooters/e-bike

4-6x per week

I've only ridden once

Daily

* 12. Since first using shared e-scooters/e-bikes, how has your use of the following transportation options changed? (If your behavior hasn't changed or if you never used one of the below options, select "About the same".)

	Less often	About the same	More often
Walking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Own personal bike	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Breeze Bike Share	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Driving alone in a private vehicle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taxi/Ride Hail Service (e.g., Uber, Lyft)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public Transit - Rail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public Transit – Bus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 13. Thinking of your most recent trip, how did you get to the e-scooter/e-bike?

- Walk
- Own personal bike
- Breeze Bike Share
- Drive Alone – (Private Vehicle)
- Carpool/Vanpool
- Ride Hail Service (e.g., Uber, Lyft)
- Public Transit - Rail
- Public Transit – Bus
- Other (please specify)

* 14. Again thinking of your most recent trip, what was your primary trip purpose?

- Work or job-related activities
- School or college-related activities
- Shopping
- Dining or eating out
- Healthcare appointment
- Child care activities
- Recreation/Fun
- To/From Home
- To/from connecting to transit
- Other activities

* 15. For your most recent trip, if an e-scooter/e-bike was not available what mode of transportation would you have used instead?

- Walk
- Own personal bike
- Breeze Bike Share
- Drive Alone – (Private Vehicle)
- Carpool/Vanpool
- Motorcycle/moped/scooter
- Taxi/hired car/limo
- Ride Hail Service (e.g., Uber, Lyft)
- Carshare (e.g., Zipcar, Waive Car)
- Public Transit - Rail
- Public Transit – Bus
- Other

* 16. In general, how often do you wear a helmet while riding an e-scooter/e-bike:

- Always
- Most of the time
- About half the time
- Rarely
- Never

* 17. When you ride an e-scooter/e-bike where do you tend to ride? (Select all that apply)

- On-Street without bikelanes
- On-Street but only if there are bicycle facilities (bike lanes, protected bike lanes, greenways etc)
- On sidewalks
- Other

* 18. To your knowledge which of the following rules apply to e-scooters/e-bikes in Santa Monica? (Select all that apply)

- You must have a valid driver's license to ride an e-scooter.
- Helmets are required to ride an e-scooter or e- bike.
- Riding on the sidewalk is not permitted.
- Riding on the Beach Path is prohibited.
- Riding on the Third Street Promenade is prohibited.
- Riding in Palisades Park is prohibited.
- While riding e-scooters/e-bikes you must obey the rules of the road.
- I am not familiar with the rules of riding e-scooters/e-bikes.

* 19. What barriers, if any, prevent you from using e-scooters/e-bikes in Santa Monica as much as you would like? (Select all that apply)

- Too Expensive
- Difficult to locate e-scooters and e-bikes when I need them
- Lack of bike lanes where I want to ride
- I don't feel safe riding e-scooters
- I don't feel safe riding e-bikes
- Other



City of Santa Monica
Shared Mobility Device Pilot Program
User Survey Results, Wave 2
Conducted 05-28-2019 to 06-09-2019

November 5, 2019

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User 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. The primary goal of the program is to inform the development of long-term policy solutions to expand sustainable mobility options equitably while protecting public safety on city streets and sidewalks.

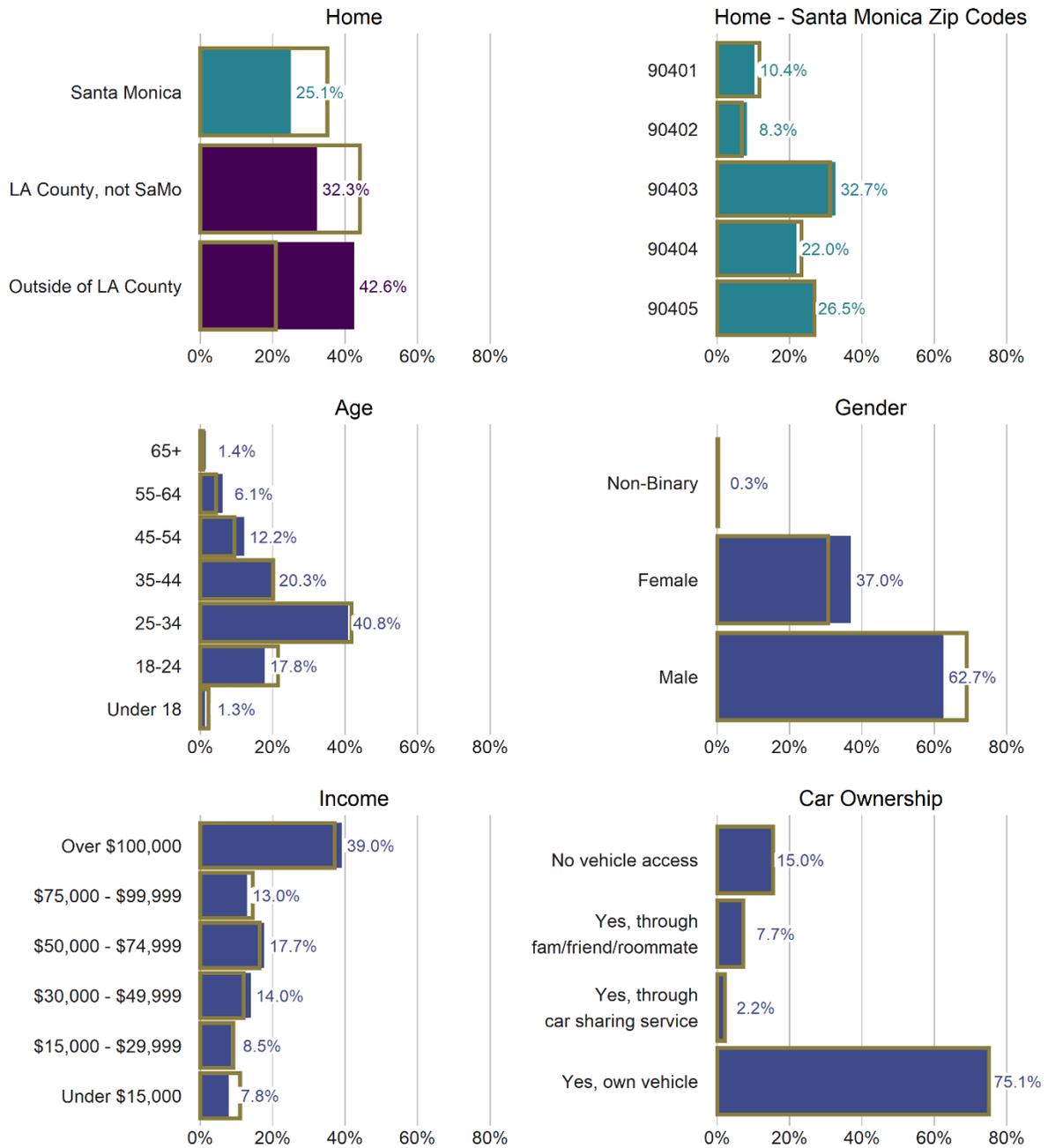
As a part of the program the City worked with the four permitted operators to conduct a survey of the shared mobility users in order to better understand: who are the users of these systems; where, why, and how often they ride; are the shared mobility trips displacing trips by other modes of transportation; and how familiar are they with the rules/ etiquette of riding shared mobility devices. The user survey was created and hosted by the City, and distributed by all four operators through email newsletters, email blasts, and/or in-app pop-ups. Two waves of the survey were conducted to gauge changes over time and seasonality. The first wave was open to responses from January 25, 2019 to February 15, 2019. The second wave was open to responses from May 25, 2019 to June 9, 2019. A total of 1,901 users self-selected to respond to the second wave survey, with approximately 1,260 completing all 21 questions. No rewards or incentives were offered to respondents of the survey. Users that responded to be under the age of 18 (Question 3), or to have never ridden a shared mobility device (Question 7), were not permitted to complete the other survey questions.

Below is a summary of the second wave survey responses, key takeaways, differences found between the two waves, and total survey response data. A summary of the first wave of responses can be found at smgov.net/sharedmobility.

Who is Riding Shared Mobility in Santa Monica?

Respondents were asked about their age, gender, income, home location, and car ownership.

Figure 1 Respondent Attribute Summary: Percentage among all survey respondents*



*Missing and non-valid responses are not figured in these or subsequent percentages.

Wave 1 results represented by outlined bars
 Wave 2 results represented by filled bars

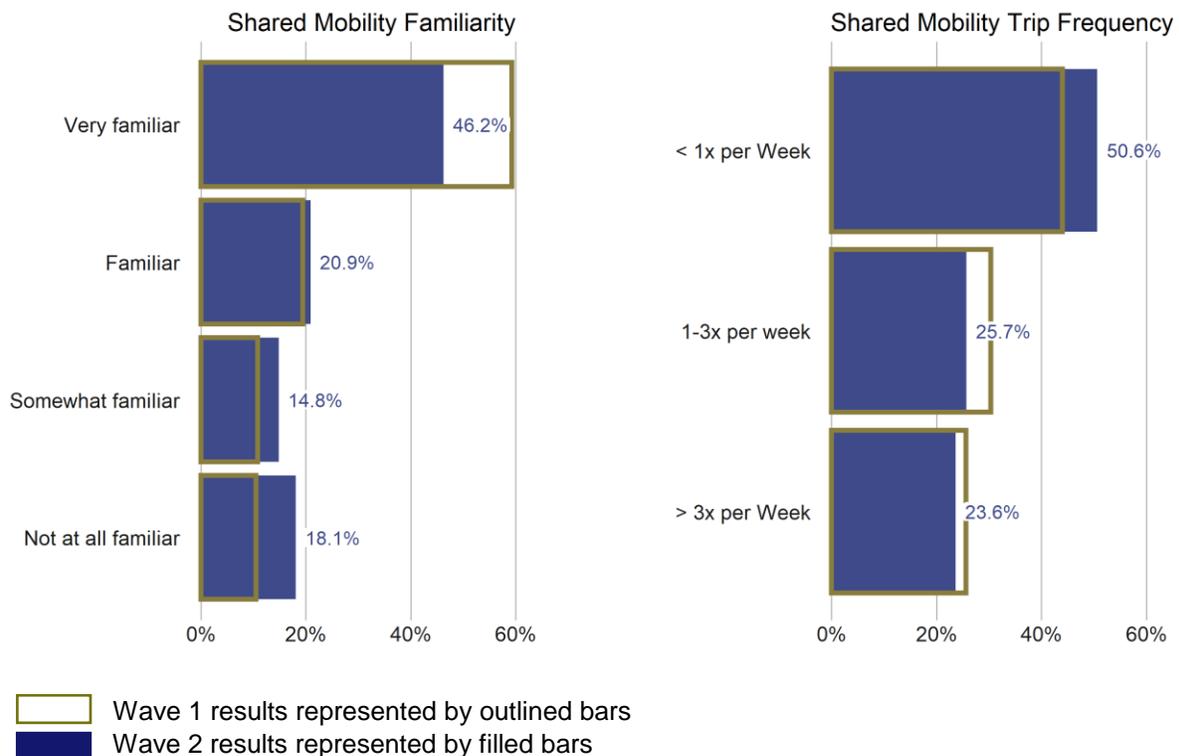
Key Takeaways

- Overall shared mobility ridership skews young, male, and affluent, with this trend holding steady across both survey waves.
- Of respondents to the second survey wave, conducted in June, 25 percent were residents of Santa Monica, and 32 percent are residents of other LA County areas. Out-of-county riders make up 43 percent of total respondents. This represents a substantial shift toward out-of-county ridership since the first survey wave, conducted in February, when only 21 percent of respondents came from outside LA County.

Travel Habits and Travel Behavior

Respondents were asked about their familiarity with the Shared Mobility Program, how often they use e-scooters and e-bikes, the purpose of their last shared mobility trip, what mode would have been taken in place of their last shared mobility trip, and to assess changes in their travel behavior/mode preferences since beginning to use shared mobility services. Given that the first survey wave showed large differences in responses based on out-of-County residence, and that the second survey wave features many more out-of-County respondents, we would expect responses in the second wave to reflect this difference. Namely, we would expect respondents overall to report less frequent trip-making, an increase in recreational trips, and an increase in sidewalk riding.

Figure 2 Travel Habits and Travel Behavior: Program familiarity and user frequency



Key Takeaways

- A plurality (46 percent) of respondents reported to be “very familiar” with the shared scooters/bikes.
- 49 percent of respondents reported to take at least one shared mobility trip per week, with 24 percent of respondents reporting more than 3 trips per week.
- Both measures show a decline in scooter rider familiarity and utilization from February to June, consistent with an increase in visitor responses.
- Figure 2a, below, helps explain this trend. While a declining share of Santa Monica and other Los Angeles County respondents were infrequent (less than once per week) riders, out-of-county respondents in the June survey were substantially more likely to report riding infrequently, resulting in an overall increase in the share of infrequent riders.

Figure 2a Proportion of Respondents Taking Less than One Trip per Week

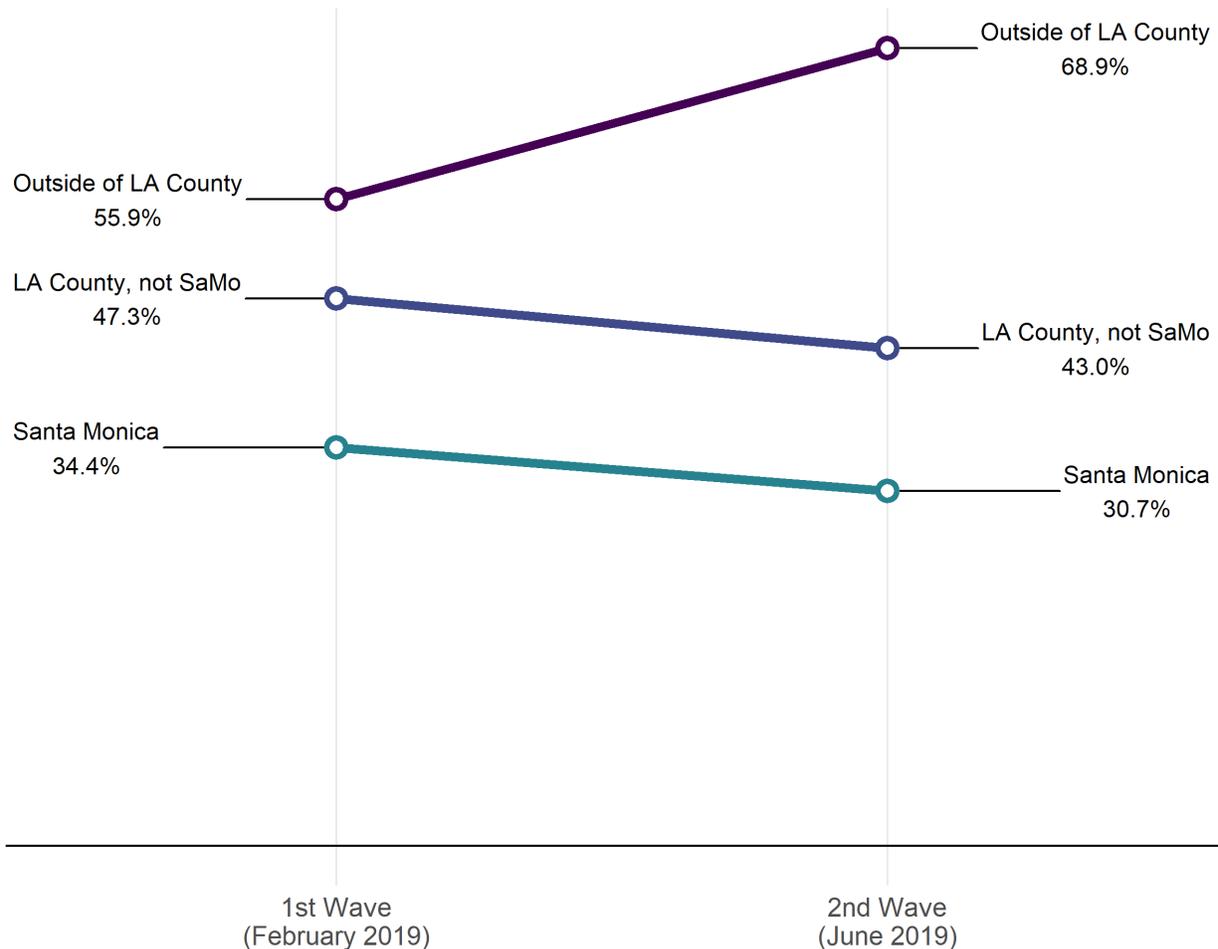
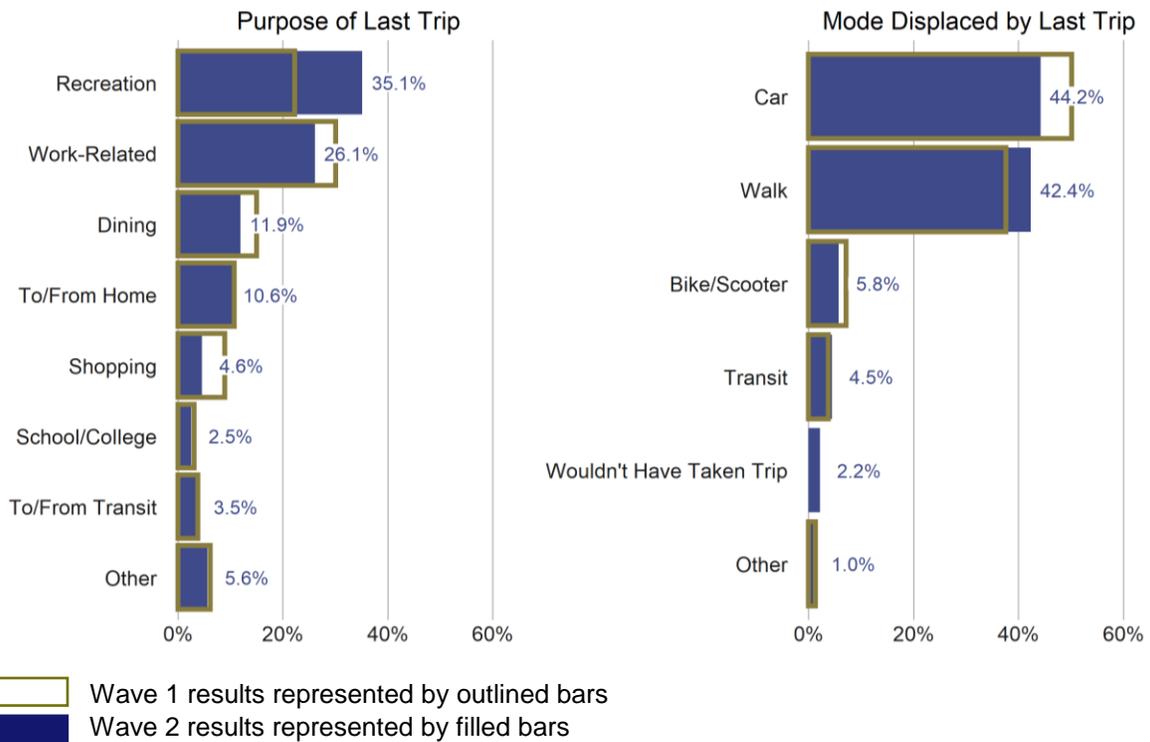


Figure 3 Travel Habits and Travel Behavior: Purpose of last trip and mode displacement



Key Takeaways

- Respondents reported taking shared mobility trips for a wide range of purposes. Work and recreation trips (26 percent and 35 percent respectively) were the most commonly reported trips.
- While work-related and recreational trips remain the most common, their relative proportions have flipped since the survey taken in February.
- The large increase in recreational trips is explained in Figure 3a, below. While the share of recreational trips for Santa Monica and other Los Angeles County respondents remained relatively constant from February to June, out-of-county respondents reported substantially more recreational trips in June, resulting in an overall increase in the proportion of such trips.
- Respondents reported that 44 percent of their most recent shared mobility trips displaced a car trip (including drive alone, ride share services, taxi, etc.), down slightly from a 50 percent figure in the first survey wave. 42 percent of shared mobility trips displace a walking trip.

Figure 3a Proportion of Respondents Who Say that Their Last Trip Was Recreational

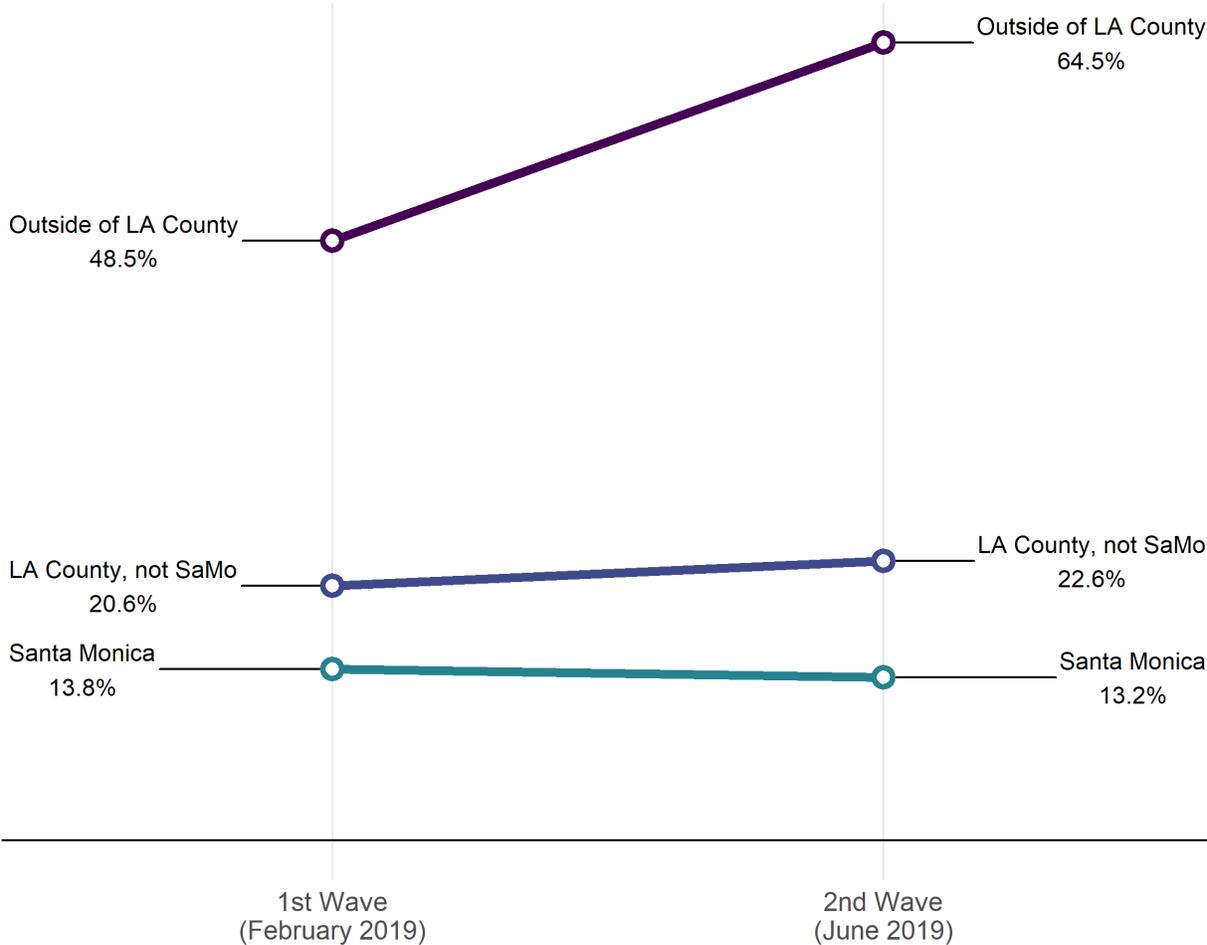
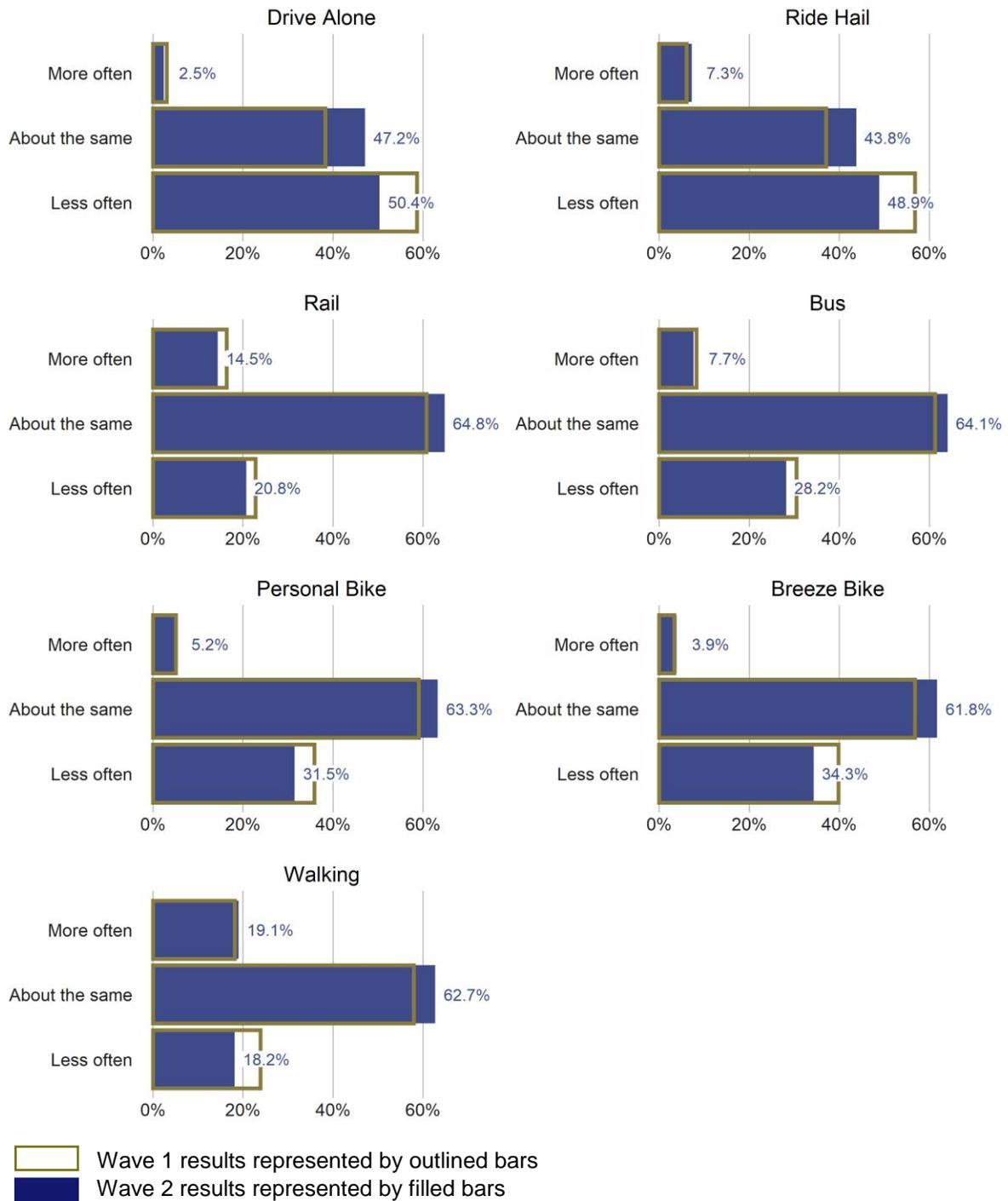


Figure 4 Travel Habits and Travel Behavior: Respondent assessment in changes of other travel modes since beginning to use shared mobility services



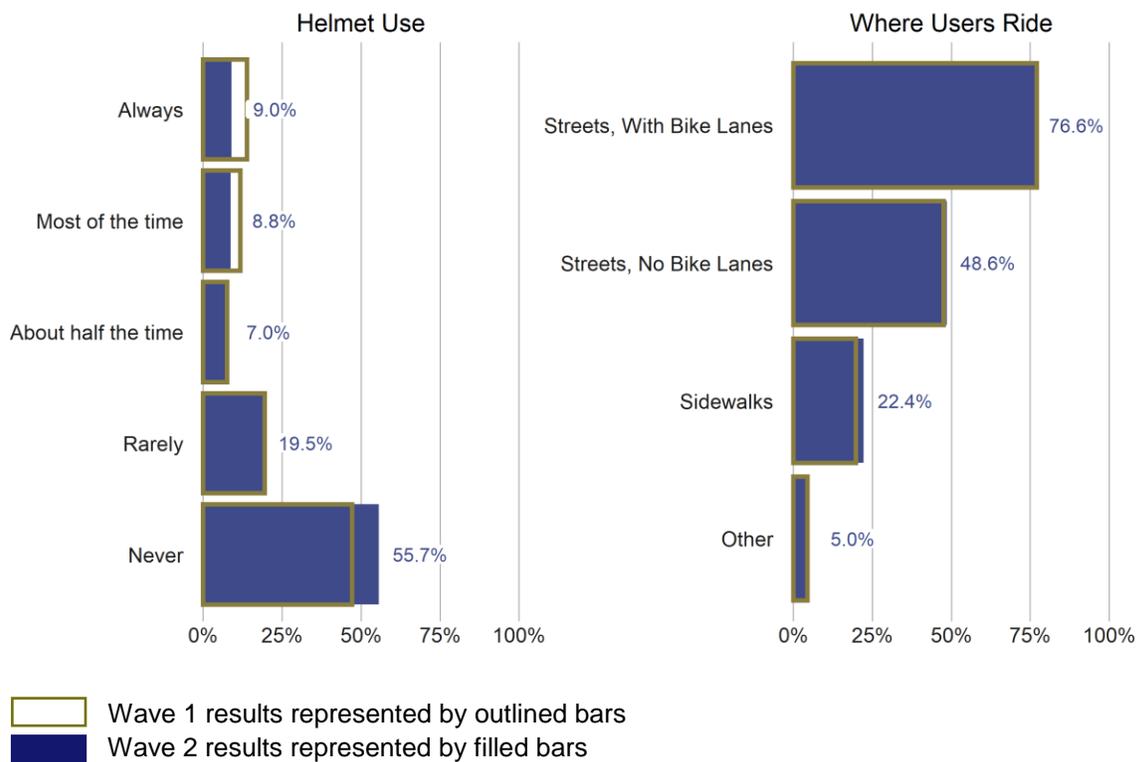
Key Takeaways

- Roughly half of respondents say that they've been using car modes less.
- Most respondents say that their transit use is unchanged, though among those who report changes, more say they take transit less often. This trend is more pronounced for bus than for rail.
- Compared to other the other modes, respondents reported a notable increase in walking and rail transit use (19 percent and 15 percent respectively) since taking up shared scooters/bikes.

Knowledge and Observance of the Rules of the Road

Respondents were asked about their knowledge of the rules of the road, where they typically ride, and barriers to use.

Figure 5 Safety, Rule Understanding, and Rule Following: Helmet Use and riding venue



Key Takeaways

- 56 percent of respondents report rarely or never wearing helmets while they ride.
- 77 percent of respondents report riding on streets with bike lanes, about half (49 percent) report riding on streets without bike lanes, and 22 percent report riding on sidewalks.
- The 22 percent of respondents who say they ride on sidewalks is a slight uptick from the 20 percent who said so in February.
- The slight uptick in sidewalk riding can also be seen as a result of changes in behavior among out-of-county respondents. As shown in Figure 5a, below, reports of sidewalk riding actually decreased among Santa Monica and other Los Angeles County respondents, while sidewalk riding increased modestly among the more prevalent out-of-county riders in June.

Figure 5a Proportion of Respondents Who Report Riding on Sidewalks

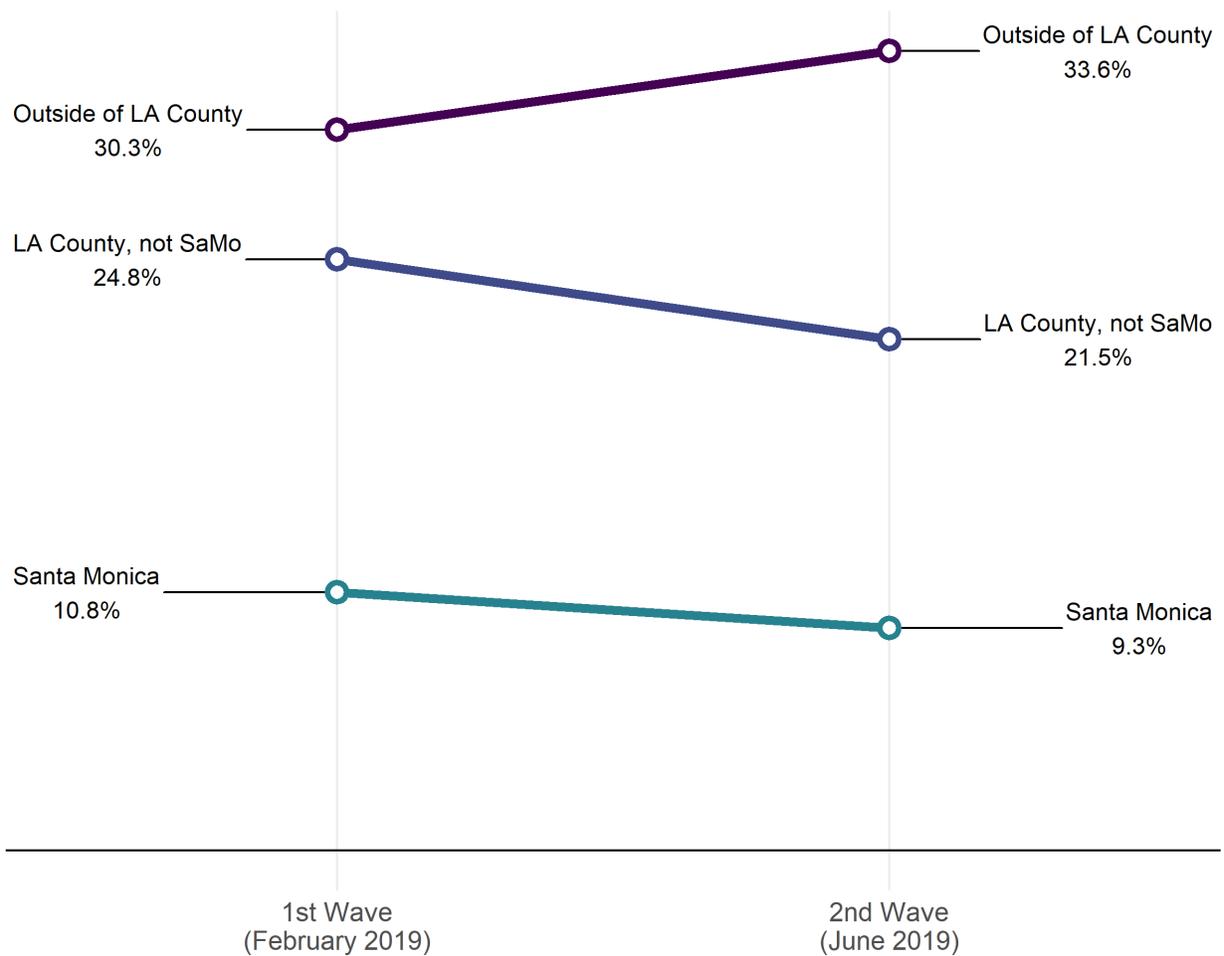
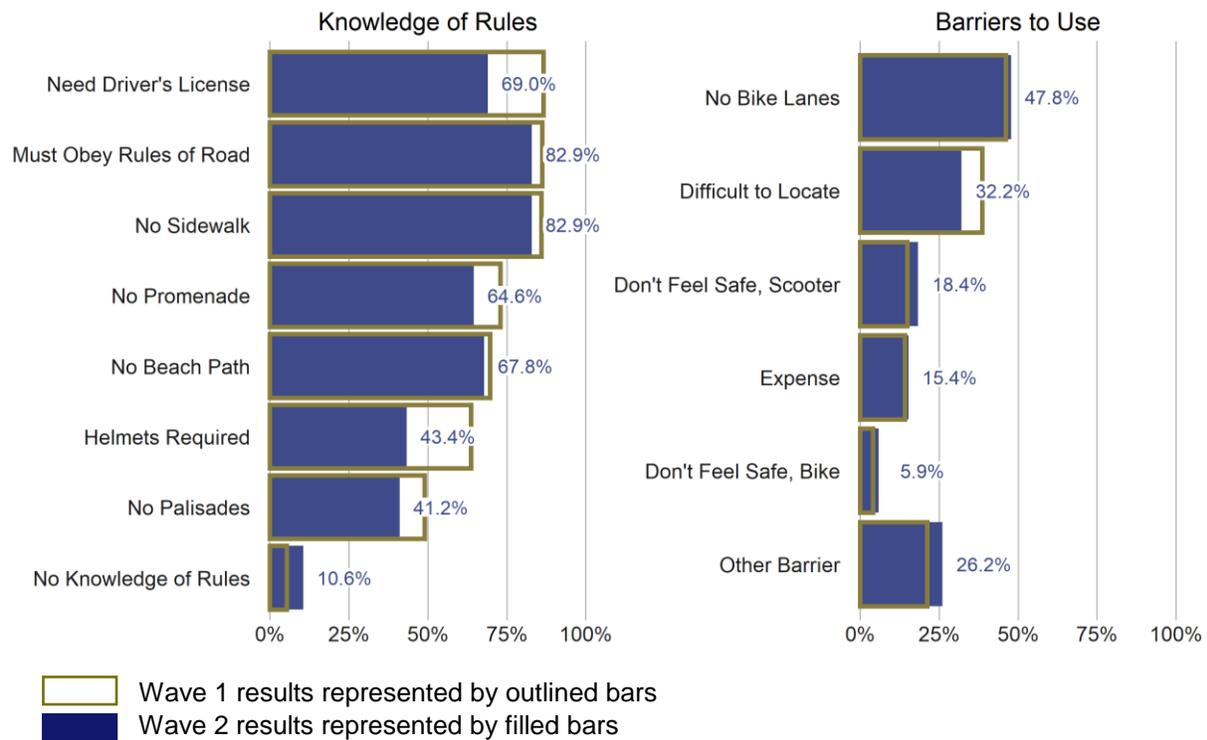


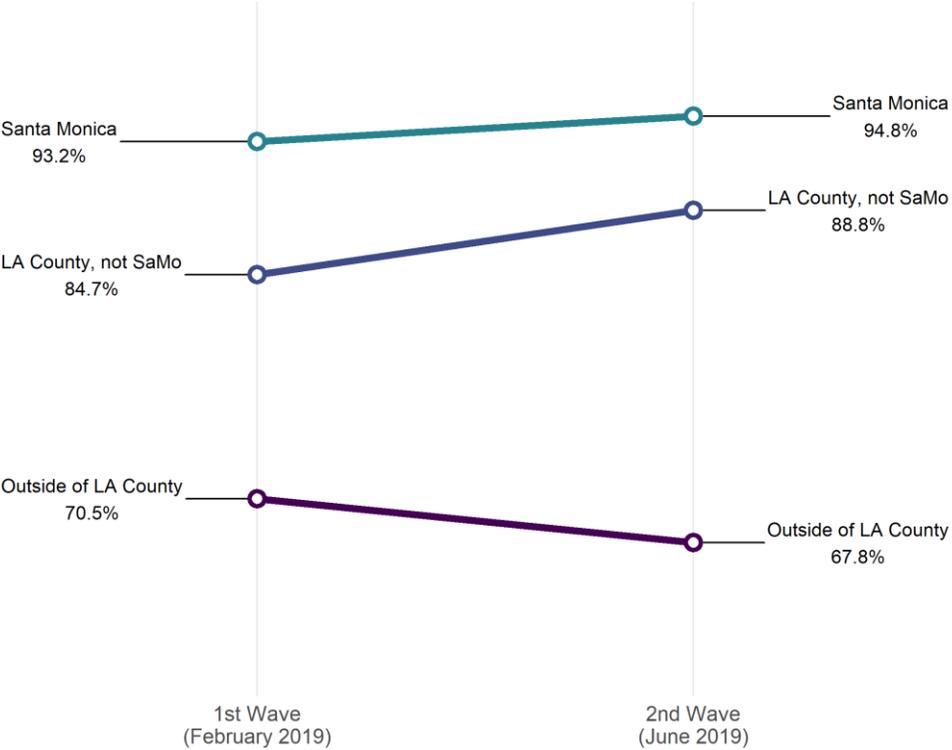
Figure 6 Safety, Rule Understanding, and Rule Following: Knowledge of Rules, and Barriers to More Frequent Shared Mobility Use



Key Takeaways

- A large majority of respondents (83 percent) say that they know that shared mobility users must follow the rules of the road and aren't allowed on sidewalks.
- A smaller majority recognize that shared mobility devices aren't allowed on the Promenade or Beach Path (65 percent and 68 percent, respectively); less than half report knowing that shared scooters/bikes aren't allowed in Palisades Park.
- The slight decline in knowledge of sidewalk rules is very similar to the slight uptick in sidewalk riding. As shown in Figure 6a, below, knowledge of sidewalk rules has improved among Santa Monica and other Los Angeles County respondents, but declined slightly among out-of-county respondents, who made up a much larger share of the survey population in June.

Figure 6a Proportion of Respondents Who Know that Sidewalk Riding Is Not Permitted



Santa Monica Share Mobility Pilot Program User Survey Responses

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

Where do you live?

Response	Count	Percent
LA County, not SaMo	614	32.3%
Outside of LA County	810	42.6%
Santa Monica	477	25.1%
90401	44	2.3%
90402	35	1.8%
90403	138	7.3%
90404	93	4.8%
90405	112	5.9%
Other Santa Monica	55	2.9%
<i>Total</i>	<i>1901</i>	<i>100.0%</i>

What is your income?

Response	Count	Percent
Under \$15,000	119	7.8%
Between \$15,000 and \$29,999	129	8.5%
Between \$30,000 and \$49,999	212	14.0%
Between \$50,000 and \$74,999	268	17.7%
Between \$75,000 and \$99,999	197	13.0%
More than \$100,000	592	39.0%
<i>Total</i>	<i>1517</i>	<i>100.0%</i>

What is your gender?

Response	Count	Percent
Female	603	37.0%
Male	1020	62.7%
Non-Binary	5	0.3%
<i>Total</i>	<i>1628</i>	<i>100.0%</i>

What is your age?

Response	Count	Percent
Under 18	25	1.3%
18-24	333	17.8%
25-34	765	40.8%
35-44	381	20.3%
45-54	228	12.2%
55-64	115	6.1%
65+	27	1.4%
<i>Total</i>	<i>1874</i>	<i>100.0%</i>

Do you have access to a motor vehicle?

Response	Count	Percent
Yes, own vehicle	1315	75.1%
Yes, through car sharing service	38	2.2%
Yes, through fam/friend/roommate	134	7.7%
No vehicle access	263	15.0%
<i>Total</i>	<i>1750</i>	<i>100.0%</i>

How familiar are you with shared mobility program?

Response	Count	Percent
Very familiar	821	46.2%
Familiar	371	20.9%
Somewhat familiar	263	14.8%
Not at all familiar	321	18.1%
<i>Total</i>	<i>1776</i>	<i>100.0%</i>

Which brands of shared e-scooter/e-bike have your ridden?

Response	Count	Percent
Bird	1121	63.1%
Jump Scooter	805	45.3%
Jump Bike	854	48.1%
Lime	781	44.0%
Lyft	636	35.8%
None	15	0.8%
Unsure	56	3.2%
<i>Total</i>	<i>1776</i>	<i>100.0%</i>

In the past month, how often have your ridden shared e-scooter/e-bike?

Response	Count	Percent
< 1x per Week	866	50.6%
1-3x per week	440	25.7%
> 3x per Week	404	23.6%
<i>Total</i>	<i>1710</i>	<i>100.0%</i>

What mode would you have used for your last trip if not for shared e-scooter/e-bike?

Response	Count	Percent
Drive Alone	190	15.1%
Other Car	365	28.9%
Transit	57	4.5%
Bike/Scooter	72	5.7%
Walk	536	42.5%
Other	13	1.3%
<i>Total</i>	<i>1261</i>	<i>100.0%</i>

Since first using e-scooters/e-bikes, how has your walking frequency changed?

Response	Count	Percent
Less often	227	18.2%
About the same	783	62.7%
More often	238	19.1%
<i>Total</i>	1248	100.0%

Since first using e-scooters/e-bikes, how has your personal biking frequency changed?

Response	Count	Percent
Less often	373	31.5%
About the same	749	63.3%
More often	62	5.2%
<i>Total</i>	1184	100.0%

Since first using e-scooters/e-bikes, how has your Breeze biking frequency changed?

Response	Count	Percent
Less often	384	34.3%
About the same	691	61.8%
More often	44	3.9%
<i>Total</i>	1119	100.0%

Since first using e-scooters/e-bikes, how has your solo driving frequency changed?

Response	Count	Percent
Less often	613	50.4%
About the same	574	47.2%
More often	30	2.5%
<i>Total</i>	1217	100.0%

Since first using e-scooters/e-bikes, how has your ride hailing frequency changed?

Response	Count	Percent
Less often	599	48.9%
About the same	536	43.8%
More often	89	7.3%
<i>Total</i>	1224	100.0%

Since first using e-scooters/e-bikes, how has your rail transit frequency changed?

Response	Count	Percent
Less often	247	20.8%
About the same	771	64.8%
More often	172	14.5%
<i>Total</i>	1190	100.0%

Since first using e-scooters/e-bikes, how has your bus transit frequency changed?

Response	Count	Percent
Less often	335	28.2%
About the same	760	64.1%
More often	91	7.7%
<i>Total</i>	1186	100.0%

For your most recent trip, how did you get to the e-scooter/e-bike?

Response	Count	Percent
Breeze Bike Share	3	0.2%
Carpool/Vanpool	16	1.3%
Drive Alone	50	4.0%
Other	6	0.5%
Own personal bike	7	0.6%
Public Transit - Rail	40	3.2%
Public Transit – Bus	8	0.6%
Ride Hail	12	1.0%
Walk	1119	88.7%
<i>Total</i>	1261	100.0%

What was the purpose of your most recent e-scooter/e-bike trip?

Response	Count	Percent
Child care	5	0.4%
Eating out	150	11.9%
Healthcare	29	2.3%
Other activities	37	2.9%
Recreation/Fun	443	35.1%
School-related	32	2.5%
Shopping	58	4.6%
To/from transit	44	3.5%
To/From Home	134	10.6%
Work-related	329	26.1%
<i>Total</i>	1261	100.0%

How often do you wear a helmet when riding an e-scooter/e-bike?

Response	Count	Percent
Never	702	55.7%
Rarely	246	19.5%
About half the time	88	7.0%
Most of the time	111	8.8%
Always	114	9.0%
<i>Total</i>	1261	100.0%

Which of the following rules apply to use of e-scooters/e-bikes?

Response	Count	Percent
Driver's license required	870	69.0%
Helmets required	547	43.4%
No sidewalk riding	1045	82.9%
No beach path riding	855	67.8%
No Promenade riding	814	64.6%
No Palisades riding	519	41.2%
Must follow rules of road	1045	82.9%
No knowledge of rules	134	10.6%
<i>Total</i>	1261	100.0%

What barriers prevent you from using e-scooters/e-bikes in Santa Monica as much as you'd like?

Response	Count	Percent
Expense	187	18.9%
Difficult to locate	391	39.5%
No bike lanes	581	58.7%
Don't feel safe, scooter	224	22.6%
Don't feel safe, bikes	72	7.3%
<i>Total</i>	990	100.0%

How would you rate the follow brands for availability?

Provider	Rating	Count	Percent
Bird	1	49	5.0%
	2	55	5.6%
	3	154	15.8%
	4	264	27.0%
	5	454	46.5%
	<i>Total</i>		976
Jump Bike	1	56	6.3%
	2	84	9.5%
	3	184	20.8%
	4	250	28.2%
	5	311	35.1%
	<i>Total</i>		885
Jump Scooter	1	81	9.5%
	2	114	13.4%
	3	209	24.6%
	4	230	27.0%
	5	217	25.5%
	<i>Total</i>		851

Lime	1	85	10.2%
	2	73	8.7%
	3	188	22.5%
	4	263	31.4%
	5	228	27.2%
	<i>Total</i>	837	100.0%
Lyft	1	78	10.1%
	2	111	14.4%
	3	202	26.1%
	4	214	27.7%
	5	168	21.7%
	<i>Total</i>	773	100.0%

How would you rate the following brands for customer service?

Provider	Rating	Count	Percent
Bird	1	54	7.6%
	2	31	4.3%
	3	106	14.9%
	4	187	26.2%
	5	335	47.0%
	<i>Total</i>	713	100.0%
Jump Bike	1	79	12.2%
	2	48	7.4%
	3	80	12.3%
	4	150	23.1%
	5	292	45.0%
	<i>Total</i>	649	100.0%
Jump Scooter	1	82	14.2%
	2	37	6.4%
	3	99	17.2%
	4	132	22.9%
	5	227	39.3%
	<i>Total</i>	577	100.0%
Lime	1	89	16.5%
	2	48	8.9%
	3	105	19.5%
	4	143	26.5%
	5	154	28.6%
	<i>Total</i>	539	100.0%
Lyft	1	73	15.0%
	2	38	7.8%
	3	85	17.5%
	4	131	27.0%
	5	159	32.7%
	<i>Total</i>	486	100.0%

How would you rate the follow brands for maintenance?

Provider	Rating	Count	Percent
Bird	1	55	5.8%
	2	86	9.1%
	3	206	21.9%
	4	270	28.7%
	5	324	34.4%
	<i>Total</i>	941	100.0%
Jump Bike	1	45	5.3%
	2	50	5.8%
	3	116	13.5%
	4	268	31.3%
	5	378	44.1%
	<i>Total</i>	857	100.0%
Jump Scooter	1	57	7.1%
	2	75	9.3%
	3	159	19.7%
	4	244	30.2%
	5	272	33.7%
	<i>Total</i>	807	100.0%
Lime	1	103	12.7%
	2	81	10.0%
	3	219	27.1%
	4	227	28.1%
	5	178	22.0%
	<i>Total</i>	808	100.0%
Lyft	1	66	9.2%
	2	57	7.9%
	3	138	19.2%
	4	210	29.3%
	5	246	34.3%
	<i>Total</i>	717	100.0%