

University Circle Shared Mobility Survey Summary

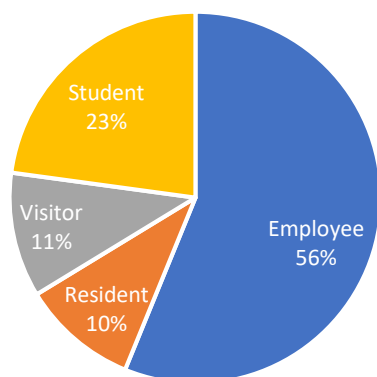
Survey conducted 12/1/19 – 1/17/20

In August 2019, the City of Cleveland launched a shared mobility pilot program, distributing permits to five shared mobility vendors to operate in the City of Cleveland. Between December 2019 and January 2020, University Circle Inc., in partnership with the University Circle Sustainable Transportation Advisory Committee, issued an online survey to collect public feedback. There were 270 responses to the survey. The following pages summarize the responses.

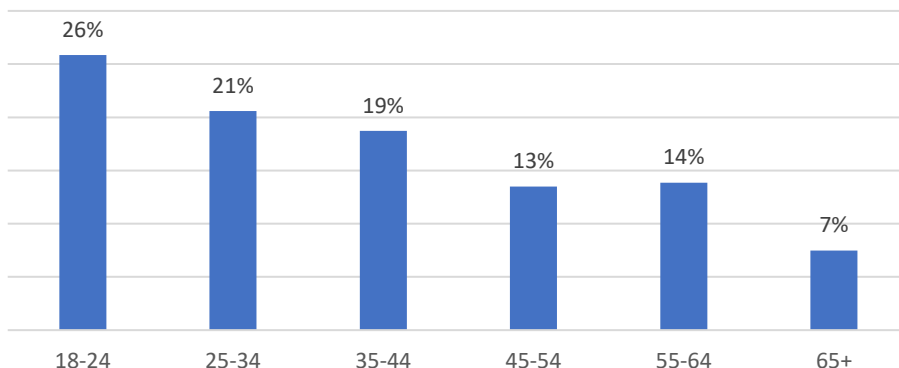
Who responded to the University Circle Shared Mobility Survey?

Respondents were asked how often they use shared e-scooters/e-bikes, where they live and how old they are. Most of the respondents to the survey are people who work in University Circle, and we received responses from students, visitors and residents in University Circle as well. Overall, about 18% of respondents use shared e-scooters/e-bikes on a regular basis.

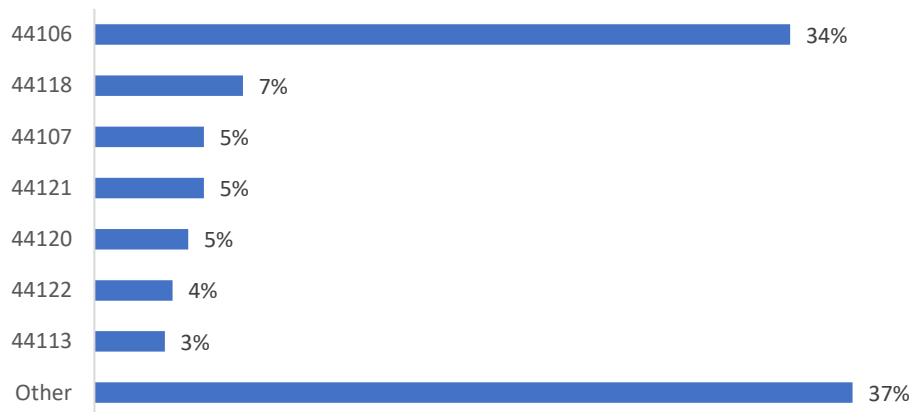
Q1: I most closely identify as a _____ in University Circle.



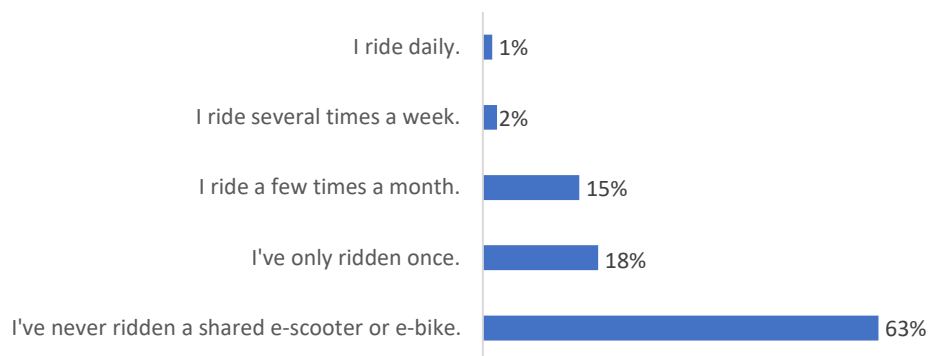
Q2: What is your age?



Q3: What is your home zip code?



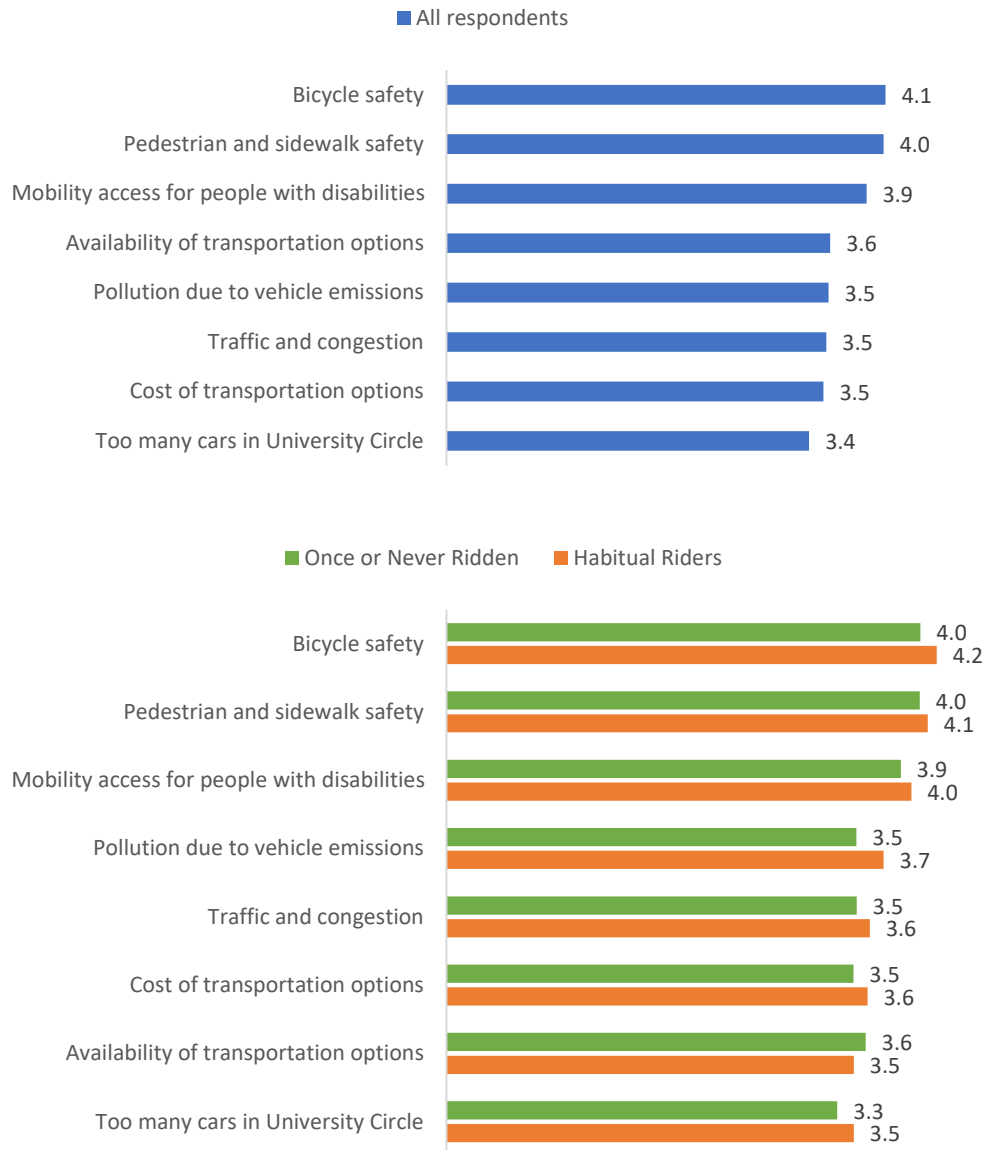
Q4: How often do you use shared e-scooters/e-bikes?



Key Takeaways

- Over half of survey respondents have never taken a shared e-scooter/e-bike trip, and 18 percent have only taken one trip. Further in this report, these respondents are grouped into a single category – ‘Once or Never Ridden’ – which comprises 81 percent of total survey responses.
- 1.5 in 10 respondents report taking shared mobility trips several times a month, with 3% of respondents taking trips either several times a week or daily. In this report, these respondents are grouped into a single category labeled ‘Habitual Riders’, which comprises 19 percent of total survey responses.

Q5. On a scale of 1-5 (1 = not serious, 5 = very serious) how do you rate the seriousness of the following issues?



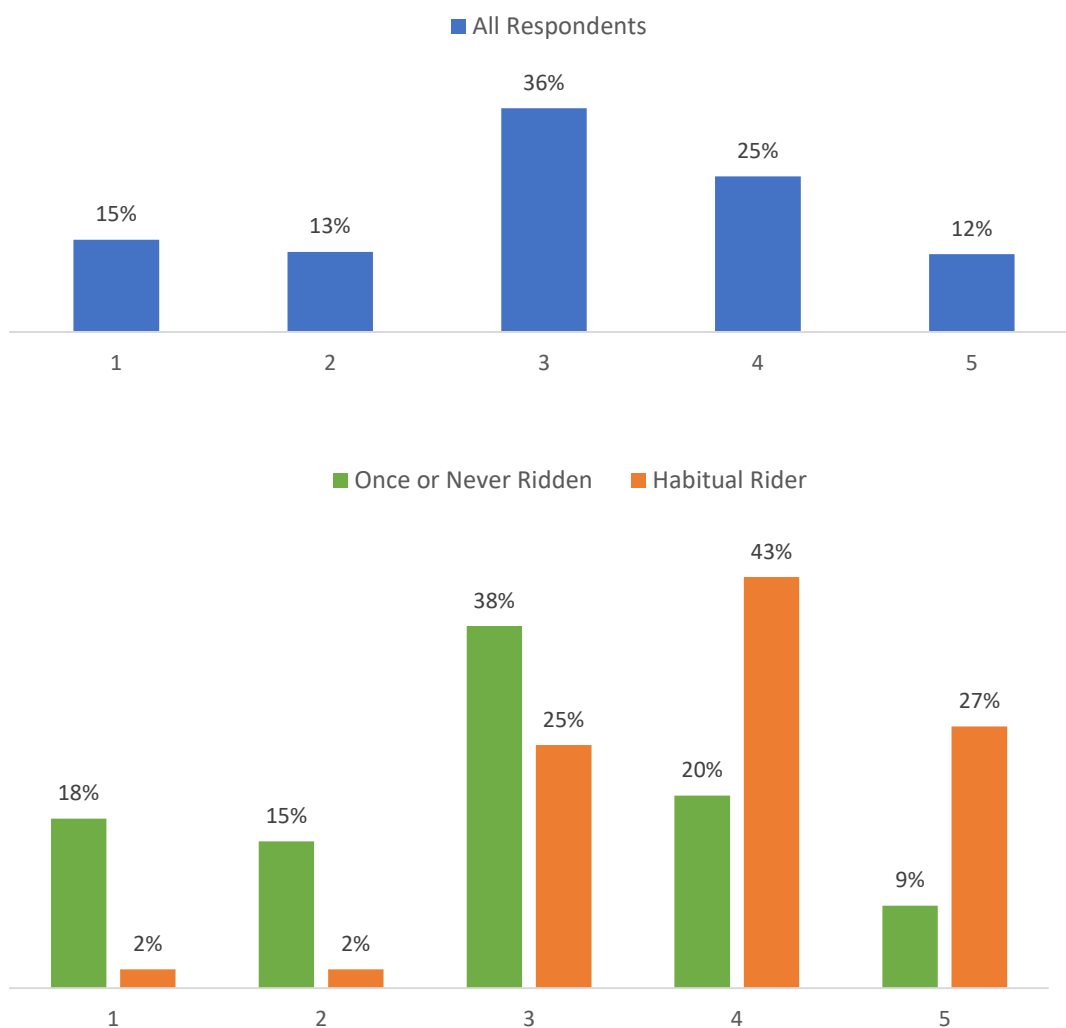
Key Takeaways

- All respondents tend to take seriously the entire set of transportation issues presented to them. Overall, bicycle and pedestrian safety 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 bicycle safety, pollution due to vehicle emissions, and the total number of cars in University Circle, and slightly less likely to be concerned about the availability of transportation options.

What Is General Perception about the Shared Mobility Pilot Program?

Respondents expressed divergent opinions on their satisfaction levels with shared e-scooters/e-bikes, depending on whether or not they use the devices. Habitual users tend to have a more favorable impression of e-scooters/e-bikes with the 3.9 star satisfaction score. Non-users have a less favorable impression with an average 2.9 star satisfaction score.

Q6. Regardless of how frequently you ride, using a five star rating system, how would you rate Cleveland's shared scooter and e-bike program so far?



Overall Rating by Age Group

	1 star	2 stars	3 stars	4 stars	5 stars	Average Star Rating
18-24	21%	17%	29%	18%	15%	2.89
25-34	11%	18%	33%	27%	11%	3.09
35-44	12%	10%	31%	33%	14%	3.27
45-54	6%	17%	36%	28%	14%	3.28
55-64	18%	3%	50%	21%	9%	3.00
65+	22%	0%	50%	22%	6%	2.89
TOTAL	15%	11%	38%	25%	11%	3.07

N = 258

Overall Rating by Identification

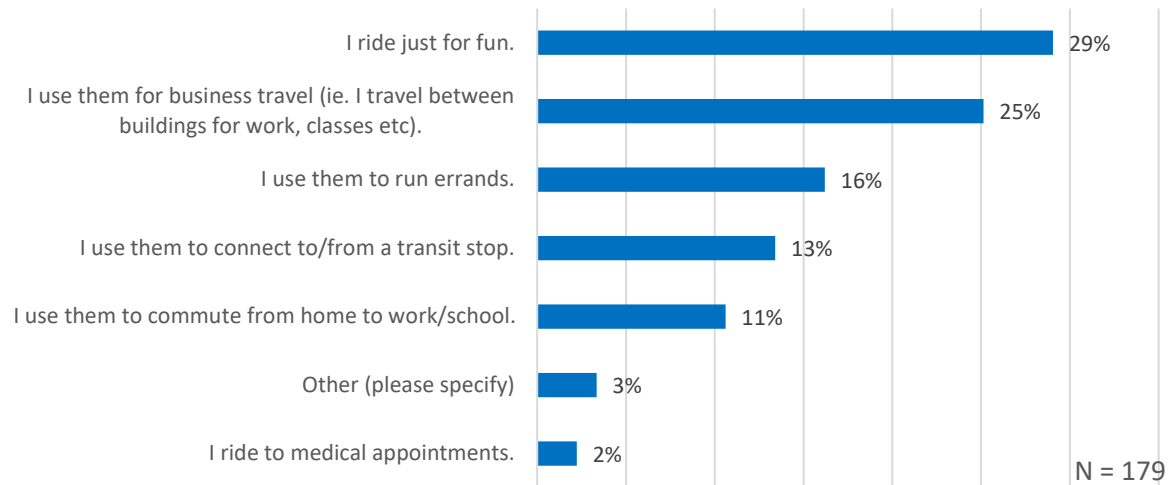
	1 star	2 stars	3 stars	4 stars	5 stars	Average Star Rating
Employee	13%	13%	35%	27%	12%	3.11
Resident	19%	8%	31%	27%	15%	3.12
Student	22%	16%	31%	17%	14%	2.84
Visitor	3%	10%	52%	24%	10%	3.28
TOTAL	15%	12%	37%	24%	13%	3.09

N = 258

Key Takeaways

- 70 percent of habitual riders give the shared mobility program a four or five star rating.
- Only 4 percent of habitual users give Cleveland’s shared mobility program a one or two star rating.
- People age 45-54 had the overall highest satisfaction average, with people on either end of the age spectrum (18-24 and 65+) having the lowest satisfaction scores.
- People who identified as visitors had the highest satisfaction rate (3.28) with people who identified as students (2.84) having the lowest.

Q7: What types of trips do you typically use shared e-scooters or e-bikes for? Select all that apply.



Those who responded with “Other” specified:

- My son & I used scooter once, it was fun. We rode the regular UH bikes a lot downtown and were surprised how easy they were to ride.
- I don't know enough about them to use them. had opportunities, didn't take them. would like to try one out to use it
- Used downtown to commute for leisure or after using rideshare
- I used e-scooters in Nashville and Virginia Beach. Would like to see them more around town - for tourism and locals.
- Ride from affordable parking to events in congested areas

Key Takeaways

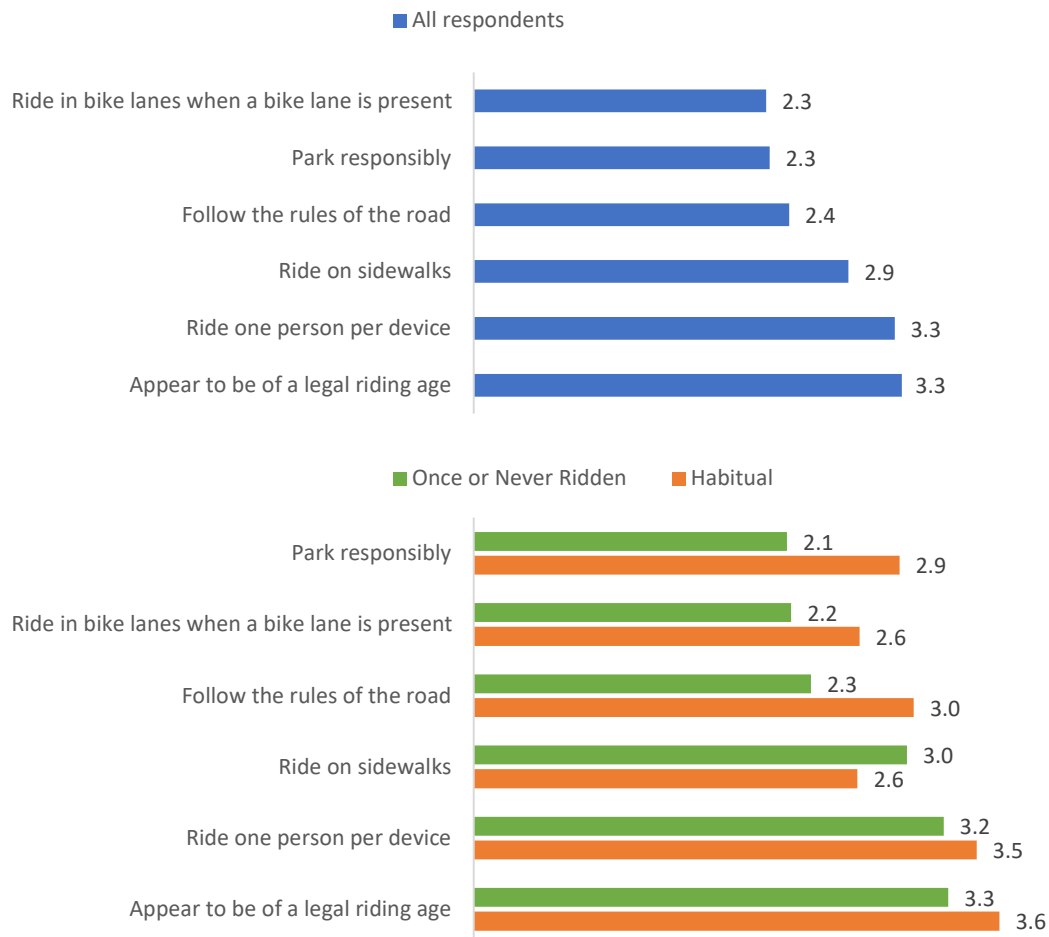
- This chart just shows the trip breakdown for people who indicate they use shared e-scooters/e-bikes.
- A quarter of trips are made for business purposes while an additional 13 percent are used to connect to or from a transit stop.
- Most respondents indicated that they don't use shared e-scooters or e-bikes (63%), but of those who do use them, 29 percent say they ride for fun.

Q8: How would you rate each of the following statements? Shared e-scooter/e-bike riders:

Average Frequency with which Respondents

Observed Rider Behavior

1 = Never, 2 = Sometimes, 3 = Mostly, 4 = Always

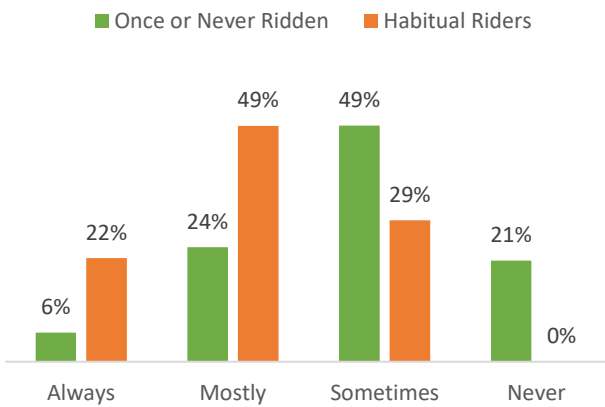


Key Takeaways

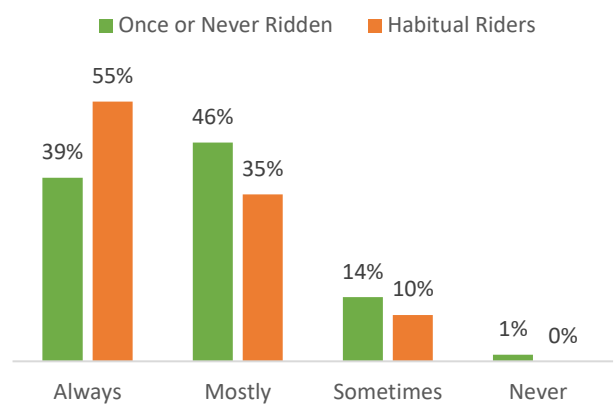
- Survey respondents regularly notice a wide range of e-scooter/e-bike user behavior, both good and bad.
- The issue of sidewalk clutter (irresponsible parking and not using bike infrastructure when it exists) emerged as most visible behaviors among the full body of respondents, although both are more noticeable among non-users.
- Whether shared e-scooter and e-bike users follow the rules of the road and park responsibly were the most polarizing behaviors observed between users and non-users.
- The issue of legal riding age and riding more than one person per device were the least frequently noticed.
- The graphs on the next page (p. 8) break down each category by user type.

Q8 (cont.): How would you rate each of the following statements?
Shared e-scooter/e-bike riders:

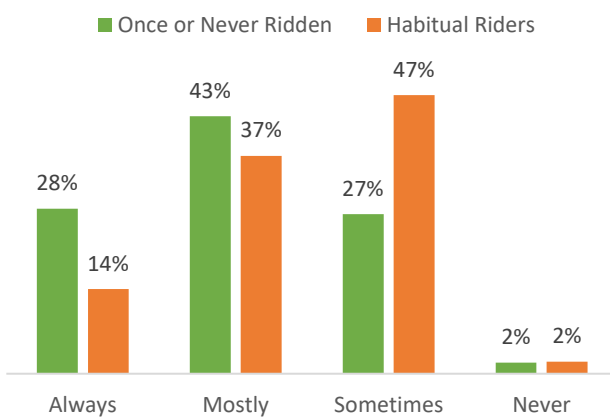
Park Responsibly



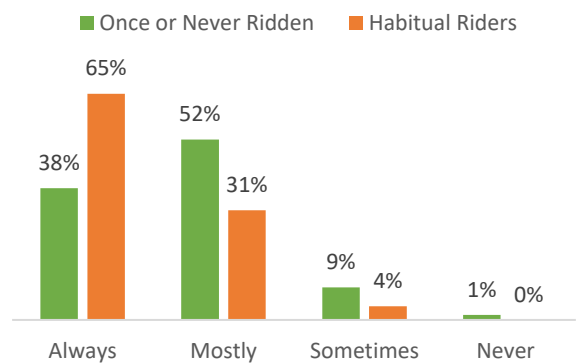
Ride one person per device



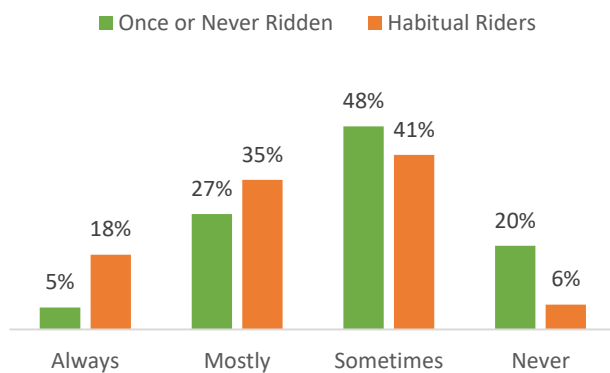
Ride on sidewalks



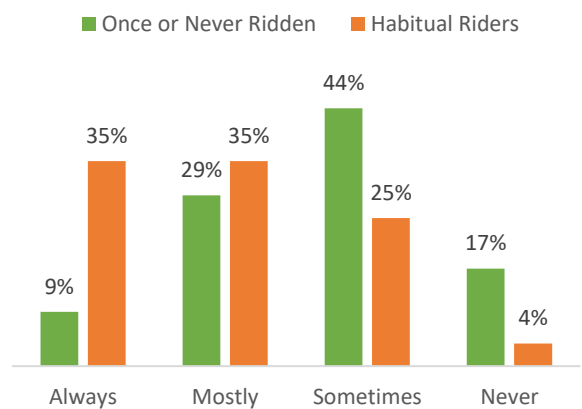
Appear to be of a legal riding age



Ride in bike lanes when a bike lane is present



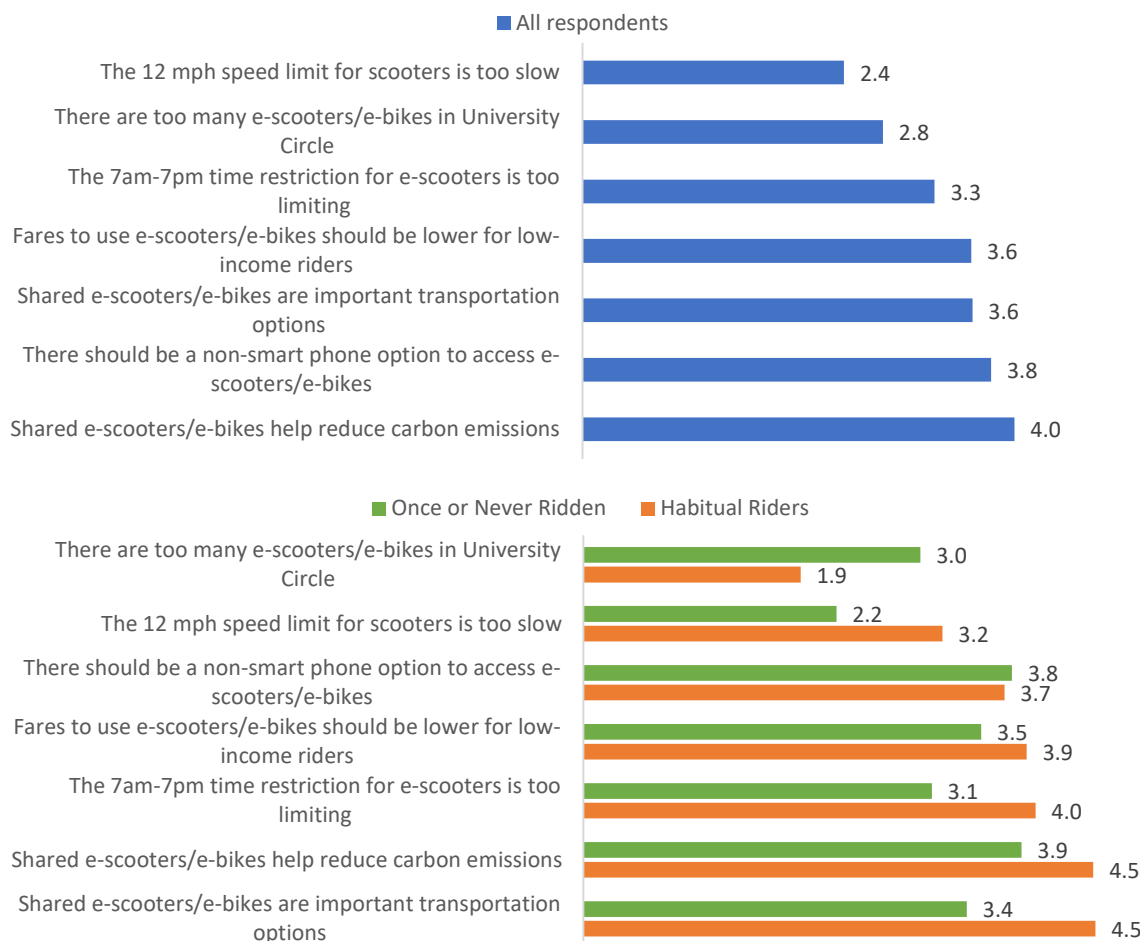
Follow the rules of the road



Q9: How would you rate each of the following statements?

Agreement with Statements

1 = Complete Disagreement, 5 = Complete Agreement

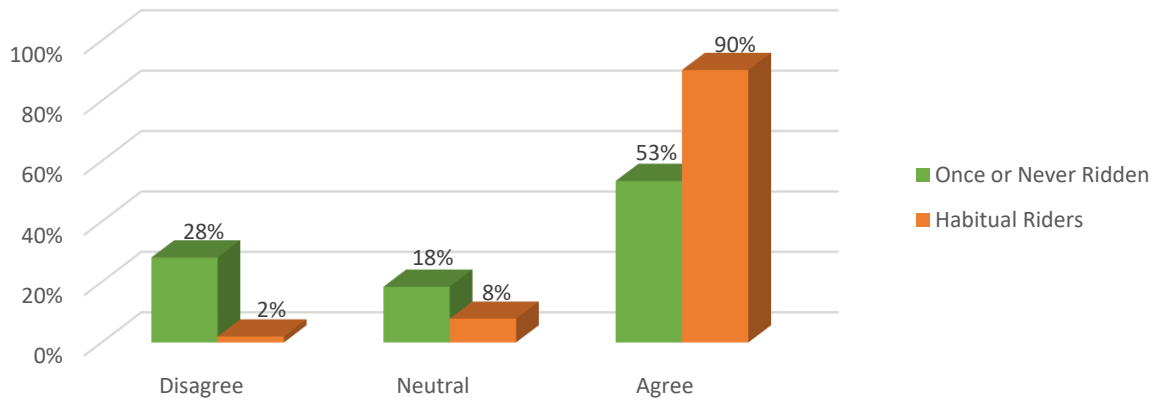


Key Takeaways

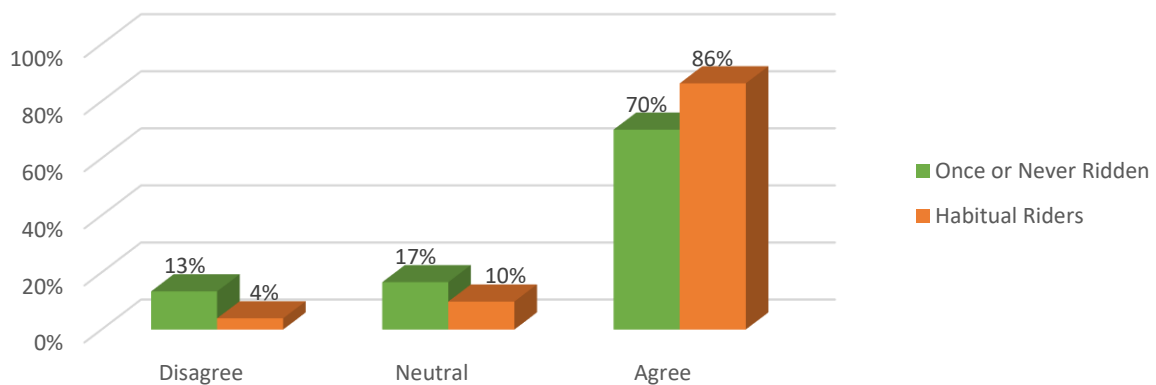
- Most people agree that shared e-scooters and e-bikes are important transportation options, although regular users feel stronger about it (90% agree) while just over half (53%) of non-users agree.
- Users and non-users agree that equity accommodations for shared e-scooters and e-bikes should be made such as non-smart phone options and lower fares based on income.
- Over 70 percent of habitual riders think the 7am-7pm time limit is too restricting, while non users are more split between agreement (40%), neutral (30%) and disagreement (30%).
- Over 70 percent of habitual riders disagree that there are “too many scooters in University Circle” while non-users are split more evenly between agreement (33%), neutral (31%) and disagreement (35%).
- Regarding the 12mph speed limit being too slow, 49 percent of habitual riders agree while 56 percent of non-users disagree.

Q9 (cont.): How would you rate each of the following statements?

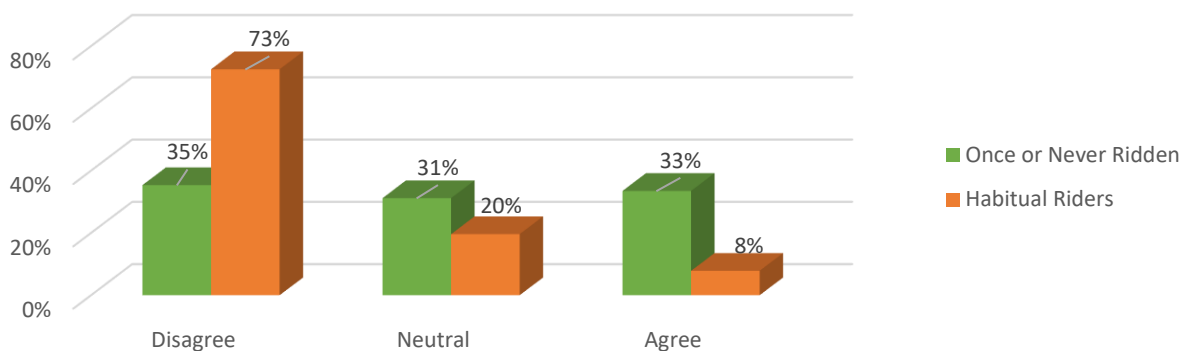
Shared e-scooters/e-bikes are important transportation options



Shared e-scooters/e-bikes help reduce carbon emissions

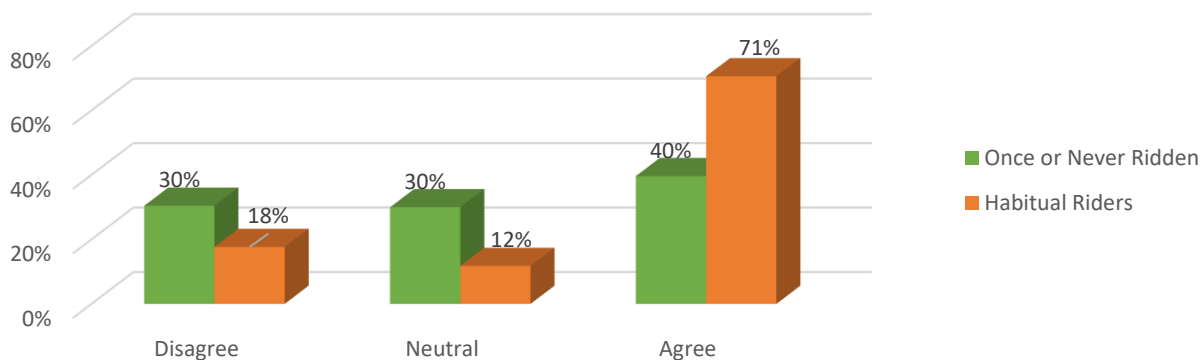


There are too many e-scooters/e-bikes in University Circle

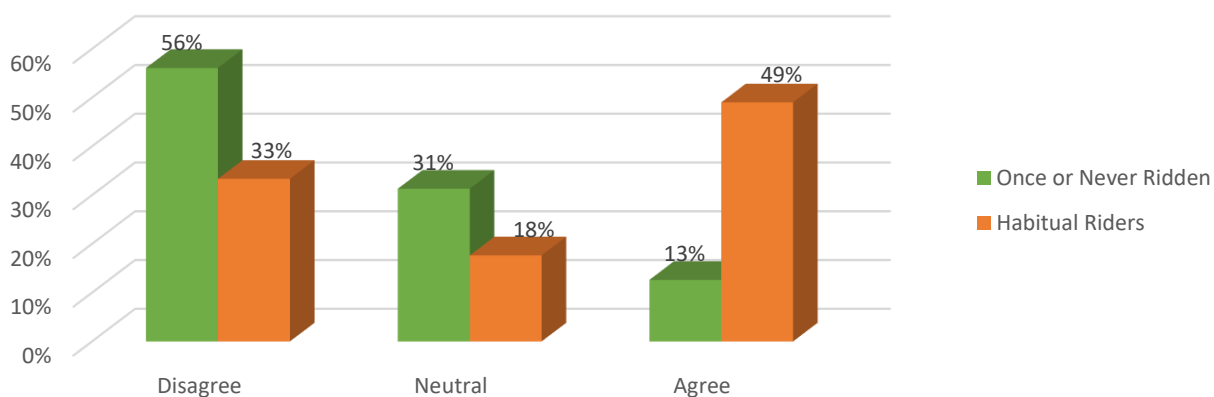


Q9 (cont): How would you rate each of the following statements?

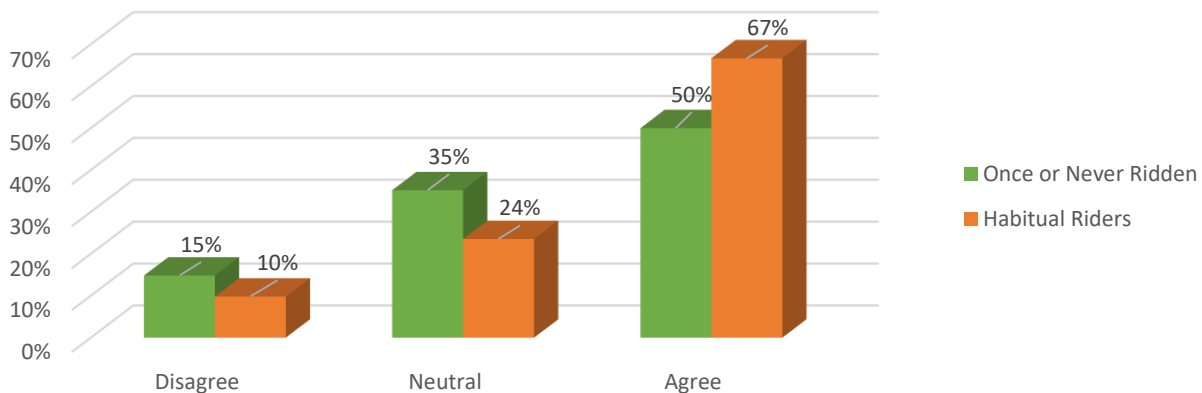
The 7am-7pm time restriction for e-scooters is too limiting



The 12 mph speed limit for scooters is too slow

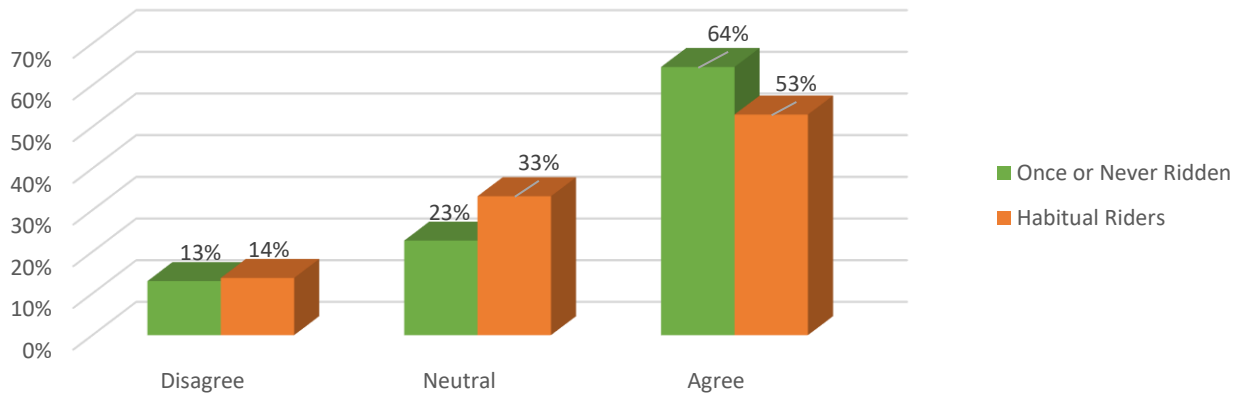


Fares to use e-scooters/e-bikes should be lower for low-income riders

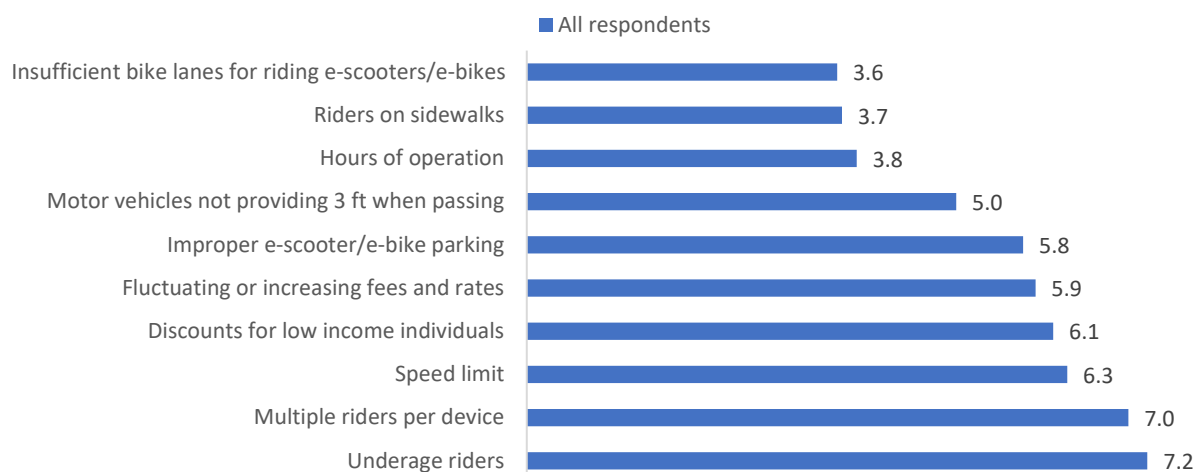


Q9 (cont): How would you rate each of the following statements?

There should be a non-smart phone option to access e-scooters/e-bikes



Q10: Which of the following issues regarding shared e-scooters/e-bikes are the most important to address? Please rank in order of priority. (1 = Highest priority, 10 = Lowest priority)

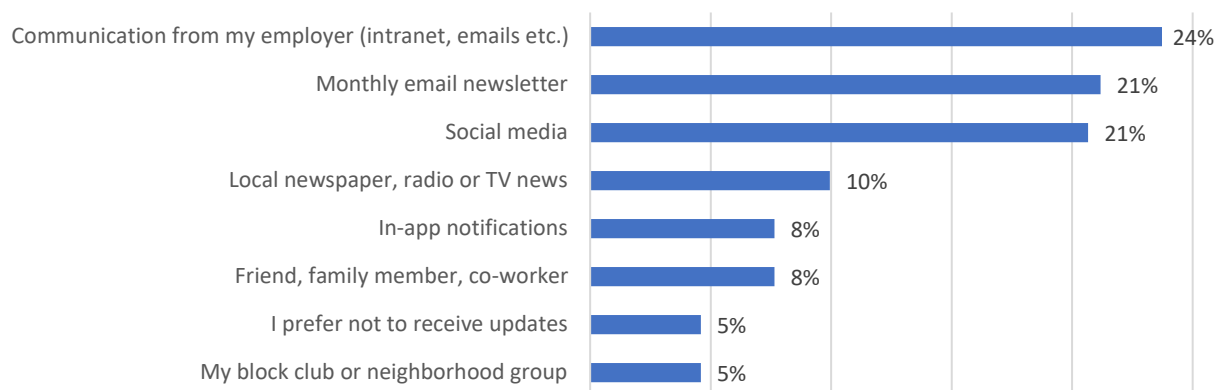


Once or Never Ridden			Habitual Riders		
Ranking		Average Score	Ranking		Average Score
#1	Riders on sidewalks	3.4	#1	Insufficient bike lanes for riding e-scooters/e-bikes	3.3
#2	Improper e-scooter/e-bike parking	3.5	#2	Riders on sidewalks	4.4
#3	Insufficient bike lanes for riding e-scooters/e-bikes	3.8	#3	Hours of operation	4.6
#4	Motor vehicles not providing 3 ft when passing	5.1	#4	Motor vehicles not providing 3 ft when passing	4.6
#5	Fluctuating or increasing fees and rates	6.0	#5	Improper e-scooter/e-bike parking	5.3
#6	Hours of operation	6.1	#6	Fluctuating or increasing fees and rates	5.6
#7	Speed limit	6.2	#7	Discounts for low income individuals	5.7
#8	Discounts for low income individuals	6.3	#8	Speed limit	6.7
#9	Multiple riders per device	7.0	#9	Multiple riders per device	7.1
#10	Underage riders	7.2	#10	Underage riders	7.4

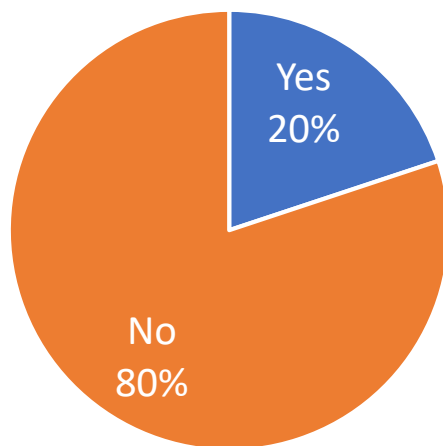
Key Takeaways

- In reading this graph, note that lower numbers correspond with a higher priority.
- Insufficient bike lanes is the highest priority among all respondents, followed closely by riders on sidewalks.
- Improper parking varied between users and non-users with habitual riders having an average ranking of 5.3 while non-users had an average ranking of 3.8.

Q11: How would you like to receive updates about Cleveland's shared mobility program?



Q 12: Have your transportation choices changed since shared e-scooters and e-bikes have become available?



	Habitual Riders	Once or Never Ridden
Yes	75%	6%
No	25%	94%

Key Takeaways

- Since the introduction of shared e-scooters and e-bikes to Cleveland, one in five respondent’s choices about transportation have changed.
- Likely due to the large number of respondents who identified as employees in University Circle, the most preferred communication channel for updates about shared mobility is communication from employers.