



City of Austin

Dockless Mobility Community Survey Report



The City of Austin Transportation Department Dockless Mobility Community Survey Report

shares results of the survey that was open to the Austin community through the month of August 2018 regarding dockless mobility services, which include bike- and scooter-share. This report discusses qualitative data at that time on community use, perceptions, preferences and opinions of dockless mobility in Austin. The survey was available online through social media and SpeakUp Austin, which is the City of Austin's central portal for online engagement. A print version was also available and distributed to people with accessibility needs.

In August 2018, most licensed dockless mobility operators provided service only within the Downtown Area Project Coordination Zone, an area of downtown Austin with specific boundaries. Only one operator had supplemental licenses to operate in additional service areas. Emergency administrative rules that were implemented in May 2018 regarding dockless mobility service providers were in place. Final rules for dockless mobility operations were filed in November 2018.

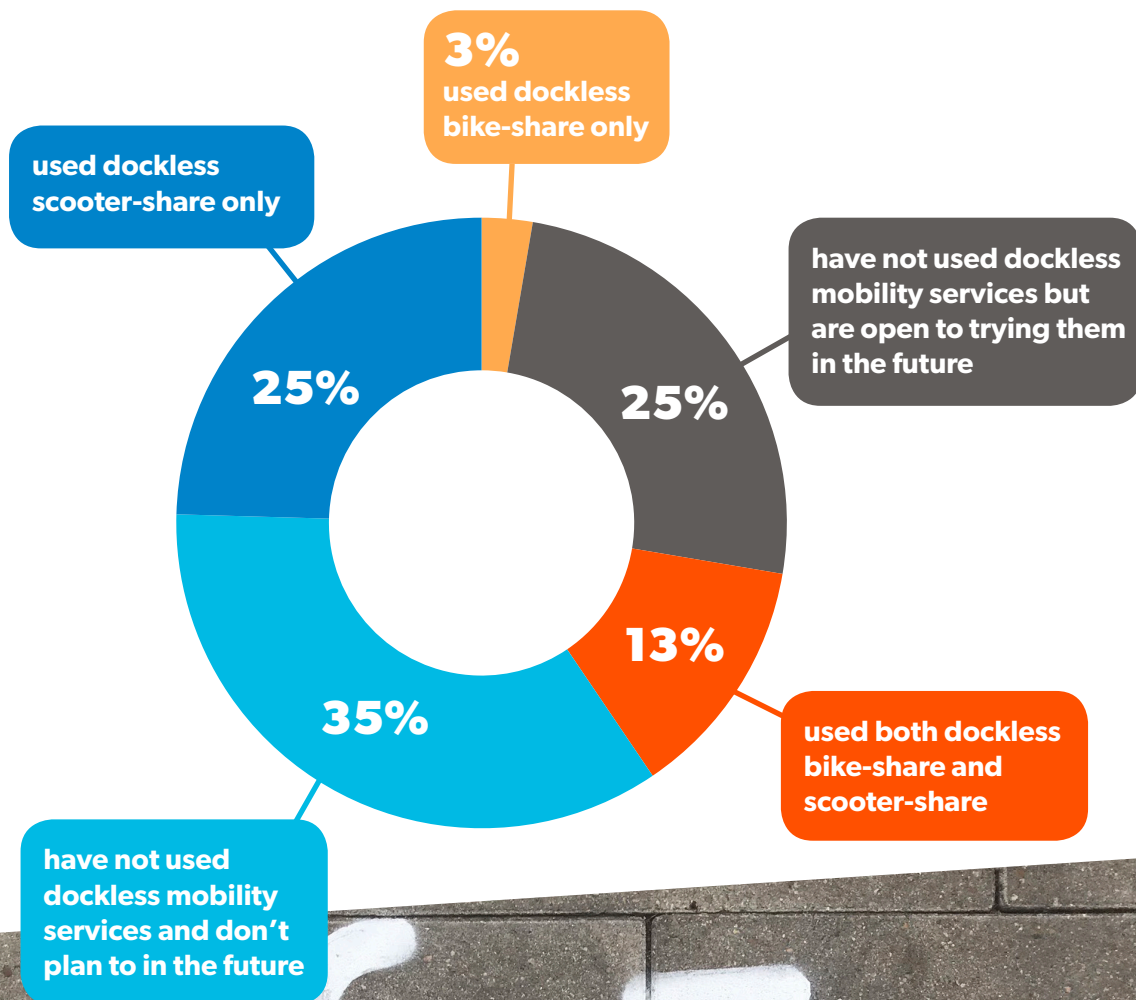
This survey received 9,560 community responses in total. All questions were optional, and specific questions about service use were displayed to people who reported they had any kind of experience using dockless mobility. The survey was provided in English and Spanish, and received 9,506 responses in English and 54 responses in Spanish.

Familiarity with Dockless Mobility in Austin

The survey asked people to rate their familiarity with the dockless mobility program operating in Austin, with 1 being very unfamiliar and 5 being very familiar. At an average of 3.69 from 9,263 responses, respondents were fairly familiar with what dockless mobility services were.

REPORTED EXPERIENCE WITH DOCKLESS MOBILITY

With respect to experience with dockless mobility, 40.5% (or 3,769) of 9,299 people said they had used a dockless mobility service to some extent before.



Feedback on Dockless Mobility Devices

Respondents who said they had experience using dockless mobility were asked to provide feedback on comfort and maneuverability, pricing, availability of devices, ease of use with the mobile app and responsiveness of the companies. These questions appeared only to the people who answered they had experience using dockless mobility services. Respondents were asked to rate their favorability of categories.

On this scale, 1 is very unfavorable and 5 is very favorable.

Dockless Bike-share User Feedback:

- **1,419** respondents provided feedback on dockless bike-share
- Average favorability regarding:
 - Comfort and maneuverability of bicycle: **3.96**
 - Pricing: **3.94**
 - Availability of bicycles: **3.69**
 - Use through a smartphone app: **4.16**
 - Responsiveness of companies to requests, concerns or questions: **3.62**

Dockless Scooter-share User Feedback:

- **3,424** respondents provided feedback on dockless scooter-share
- Average favorability regarding:
 - Comfort and maneuverability of scooter: **4.30**
 - Pricing: **4.23**
 - Availability of scooters: **3.74**
 - Use through a smartphone app: **4.45**
 - Responsiveness of companies to requests, concerns or questions: **3.81**

How People Use Dockless Mobility Services

Respondents who said they had used dockless mobility services were shown questions about the purposes for which they use dockless mobility.

3,359 respondents answered the question on how they use dockless mobility services and ranked trip purposes by frequency. They had the option of selecting N/A if a purpose did not apply. The trip type options that could be ranked were **work**; **fun** or **recreation** (no specific destination); **entertainment** (restaurant, movie or show); **errands** (shopping and appointments); and **school** (to, from and for school-related purposes).

Of those who answered this question:



About 60% (2,035) included work among their trip purposes. 922 respondents ranked work trips the most frequent trip type they took.



About 96% (3,209) included recreation among their trip purposes. 908 respondents ranked recreational trips the most frequent trip type they took.



About 81% (2,707) included entertainment among their trip purposes. 645 respondents ranked trips for entertainment, such as to dinner, movies, or shows, the most frequent trip type they took.



About 70% (2,361) included errands among their trip purposes. 456 respondents ranked errand trips the most frequent trip type they took.



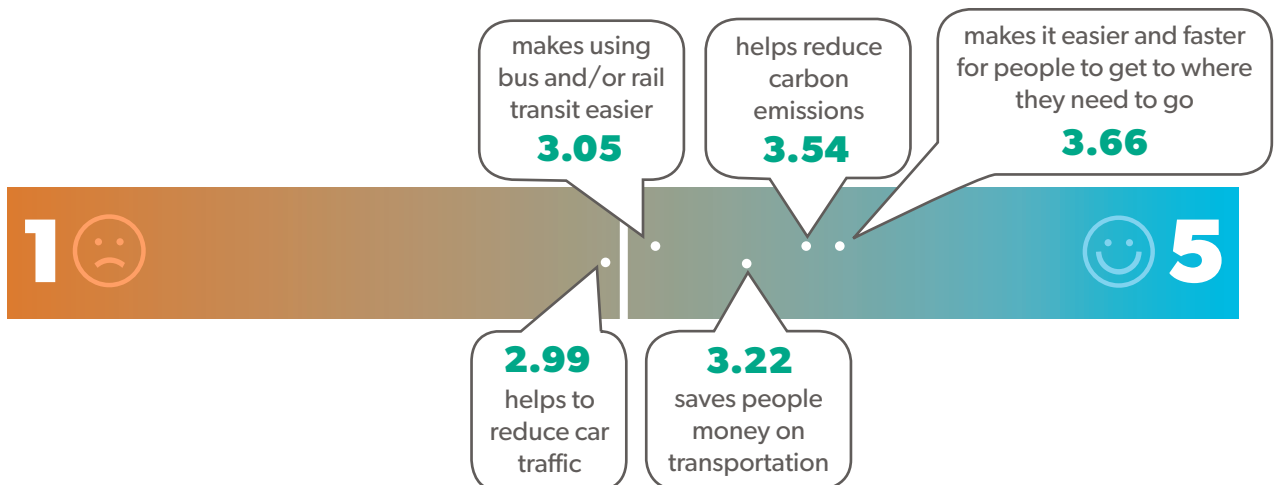
About 25% (844) included school among their trip purposes. 251 of respondents ranked school-based trips the most frequent trip type they took.

How People Perceive Dockless Mobility Services

The survey displayed questions to everyone regarding their perceptions of dockless mobility. These questions asked respondents to rate their level of agreement with reasons why someone might like or dislike dockless mobility services operating in Austin. On this scale, **1 is strongly disagree** and **5 is strongly agree**.

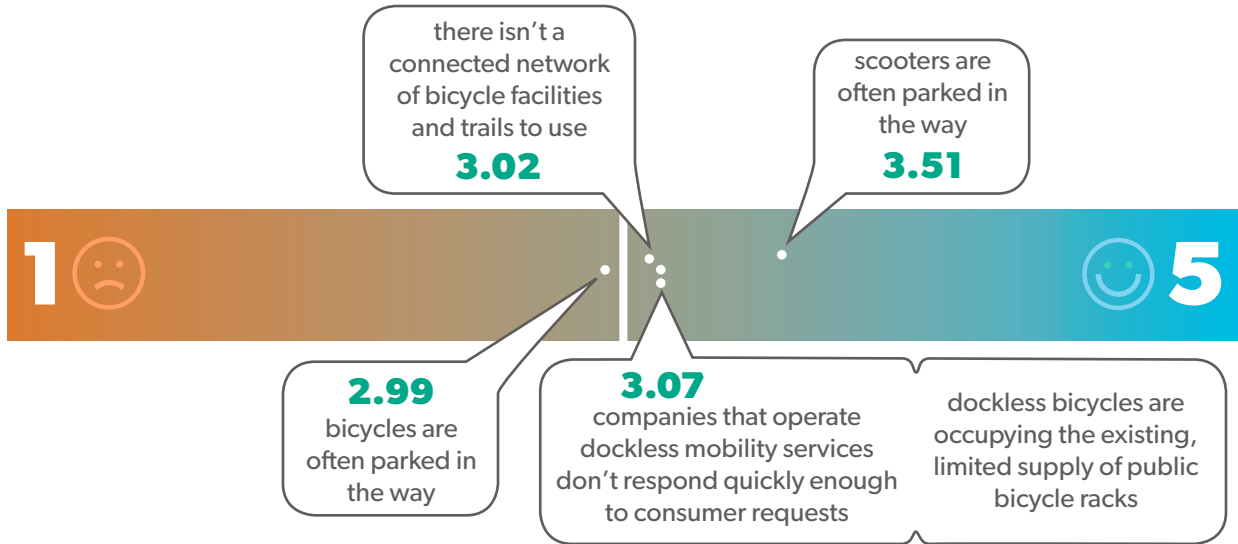
PERCEPTIONS ON WHY SOMEONE MIGHT LIKE DOCKLESS MOBILITY

8,554 respondents rated their level of agreement with the potential reasons someone might like dockless mobility.



PERCEPTIONS ON WHY SOMEONE MIGHT DISLIKE DOCKLESS MOBILITY

8,372 respondents rated their level of agreement with the potential reasons why someone might dislike dockless mobility.

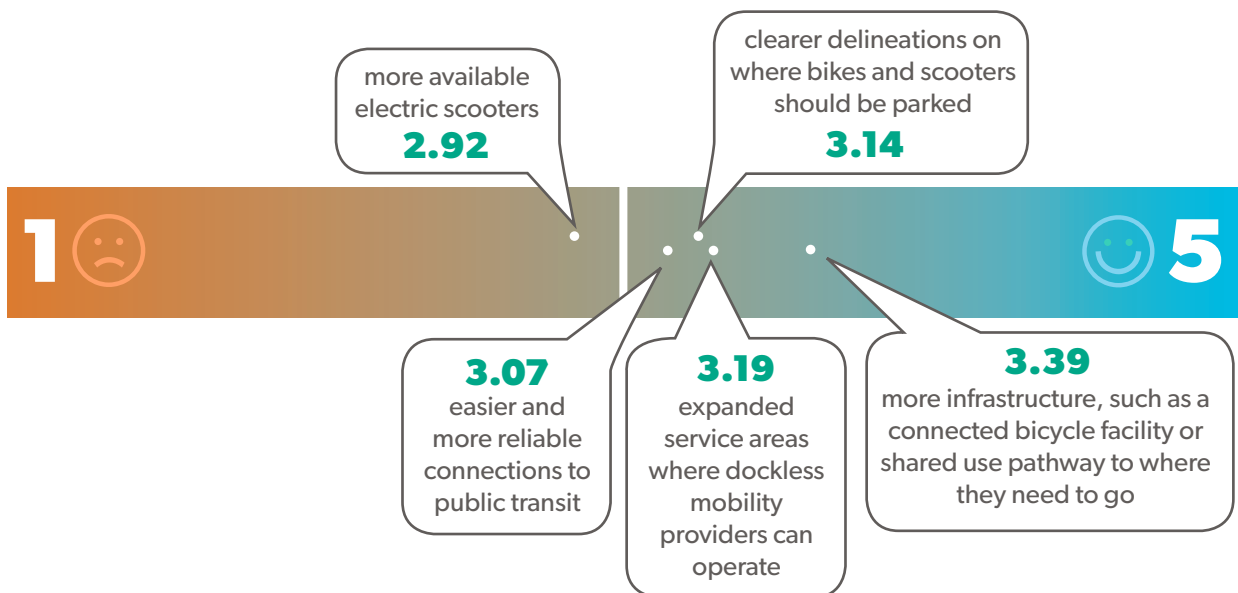


PERCEPTIONS ON WHY SOMEONE MIGHT BE MORE LIKELY TO USE DOCKLESS MOBILITY

7,984 respondents rated their agreement with statements on what would influence their decision to use dockless mobility.

On this scale, 1 is strongly disagree and 5 is strongly agree.

The top five statements with high agreement were mainly infrastructural and regulatory needs that would increase the likelihood of someone using dockless mobility.





PERCEIVED EASE OF ACCESS WITH DOCKLESS MOBILITY

All respondents were given the opportunity to provide responses on perceived ease of access to certain places using dockless mobility.

Parks were considered easy to access with dockless mobility. Out of 3,040 responses, 67% (2,034) rated it somewhat easy (637) or very easy (1,397) to access parks. Most frequently listed destinations include Auditorium Shores, Barton Springs, Pease Park, Mueller Park, Republic Square and Lady Bird Lake.

Transit (bus stops or rail stations) were considered easy to access with dockless mobility. Out of 3,035 responses, 53% (1,618) rated it somewhat easy (492) or very easy (1,126) to get to transit – so more than half of respondents thought it was easy to get to transit using dockless mobility. About 6% rated it somewhat difficult (119) or very difficult (52) to access transit. Most frequently listed bus route destinations include MetroRapid routes 801 and 803, the MetroRail, and Routes 3, 7, 10 and 20. Listed stations include MLK Station and Crestview Station.

Workplaces were considered easy to access with dockless mobility, depending on how close a respondent lived to their workplace. Out of 3,026 responses, 52% (1,593) rated it somewhat easy (407) or very easy (1,186) to get to their workplace using dockless mobility. On the other hand, 8% (242) rated it somewhat difficult to get to their workplace and 13.68% (414) rated it very difficult.

Home was more divided in its perceived ease of access with dockless mobility. Out of 3,028 responses, about 54% rated it somewhat easy (433) or very easy (1,200) to get home using dockless mobility. For 10.83% (328) it was somewhat difficult and for 16.91% (512) it was very difficult. For respondents, this rating depended on how close home was located to where dockless mobility devices were available. Most frequently listed areas for home include Downtown Austin, West Campus, Riverside, Mueller, East Austin and Zilker.

School did not have as strong opinions on ease of access with dockless mobility. Out of 3,019 responses, 2,221 had no opinion. Note that the survey may not have made it widely to students on campuses since the operating areas of most licensed operators had not yet reached university or college campuses in Austin.

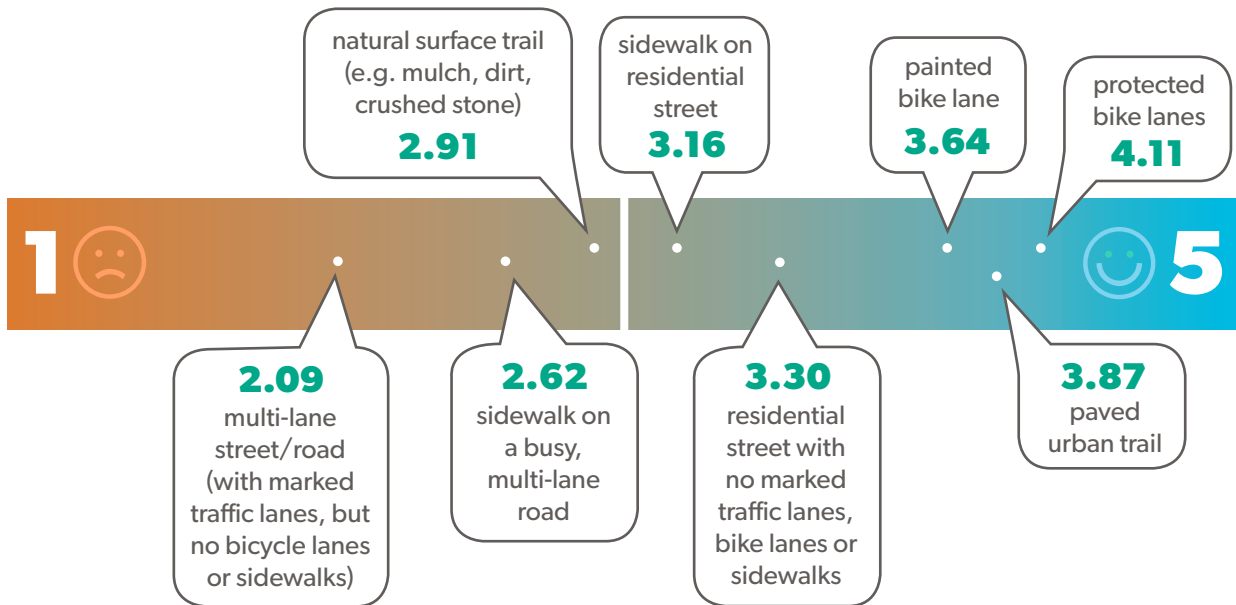
Shops and other retail were considered easy to get to by dockless mobility. Out of 3,014 responses, 72.89% considered it somewhat easy (717) or very easy (1,480). Most common areas for shopping include South Congress, Lamar Boulevard, Mueller and the Domain.

Special events were considered easy to get to by dockless mobility. Out of 3,015 responses, 58.64% considered it somewhat easy (647) and considered it very easy (1,140).

PERCEIVED COMFORT ON DIFFERENT INFRASTRUCTURE

7,370 respondents rated levels of comfort using shared micromobility on certain travelways. This question was open to everyone so they could share their input on any experience using either scooters or bicycles on travelways.

On this scale, **1** is very uncomfortable and **5** is very comfortable.



PERCEPTIONS OF AVAILABILITY OF DOCKLESS MOBILITY

6,684 respondents selected areas of Austin where they thought dockless mobility devices were available and ready to use. User perception of device availability aligned with where operators were authorized to operate, in the central part of the city, in the downtown area, near the University of Texas campus.

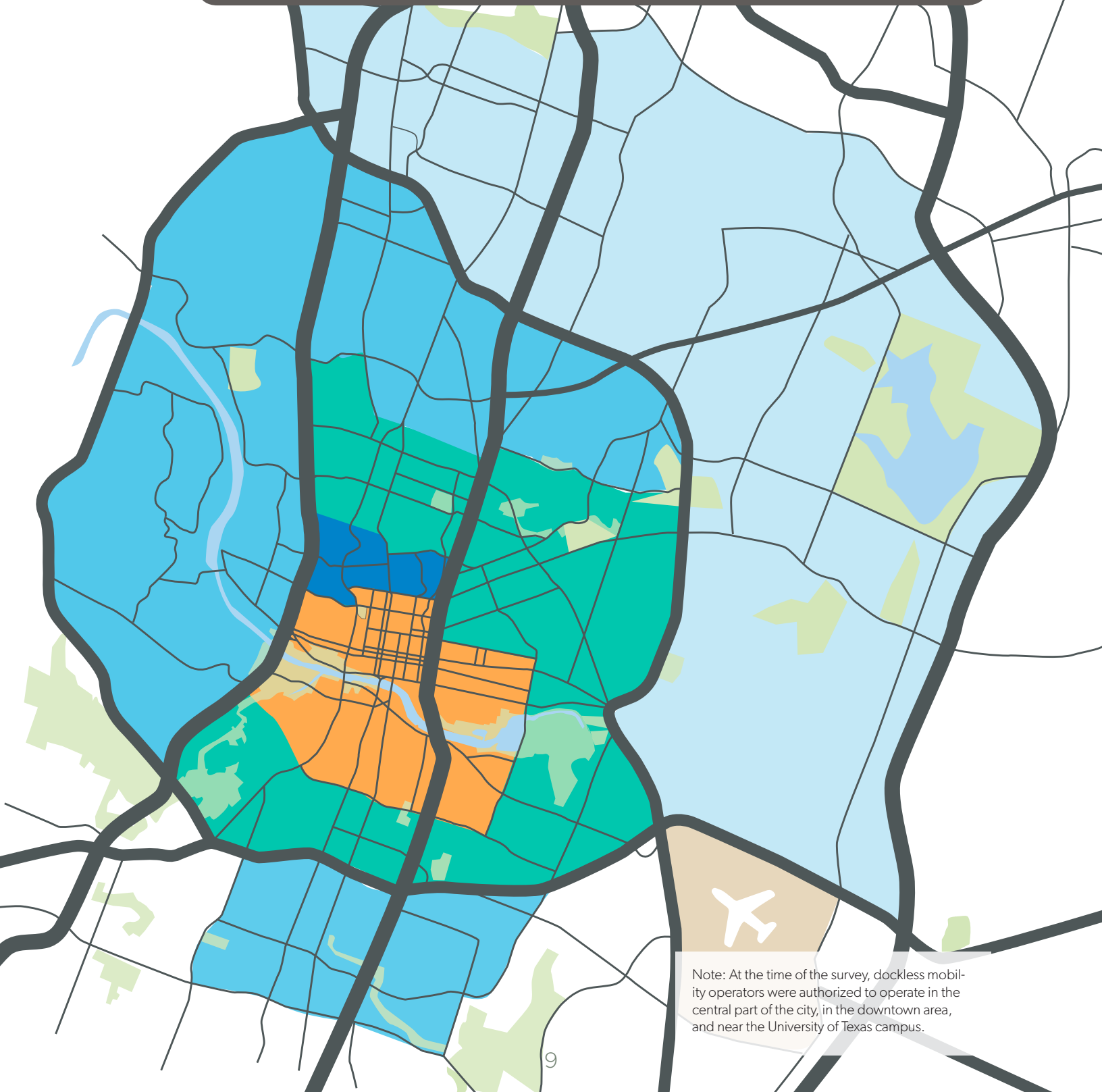
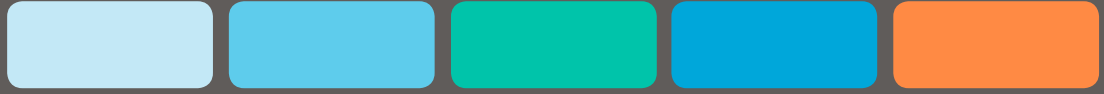
See map on the next page.



PERCEIVED AVAILABILITY OF DOCKLESS MOBILITY

LOW

HIGH



Note: At the time of the survey, dockless mobility operators were authorized to operate in the central part of the city, in the downtown area, and near the University of Texas campus.

Greater Downtown Austin Area (e.g., Chicon Street to MoPac, and Oltorf Street to Martin Luther King Jr. Boulevard) **89.92% / 6,010**

Central South (e.g., South Lamar, Galindo, Dawson, St. Edward's) **27.42% / 1,833**

Central Southeast (e.g., Parker Lane, Riverside, Pleasant Valley, Montopolis) **7.85% / 525**

South of Ben White/US 290/SH 71 **2.63% / 176**

University of Texas area, West Campus **54.32% / 3,631**

Central North (e.g., Rosedale, Hyde Park, Hancock, Windsor Road, The Triangle, North Loop) **12.43% / 831**

North of Anderson Lane/FM 2222 and South of US 183 **2.36% / 158**

Central East (e.g., Holly, Govalle, Rosewood, Chestnut, Upper Boggy Creek, Mueller-RMMA, Johnston Terrace, MLK and East MLK) **16.32% / 1,091**

Northeast (e.g., Windsor Park, University Hills, Pecan Springs Springdale, Coronado Hills, St. John) **2.87% / 192**

West of MoPac **2.26% / 151**

North and East of US 183 **1.75% / 117**

Other (please specify) **6.58% / 440**

PERCEPTIONS OF DEMAND FOR DOCKLESS MOBILITY

3,656 respondents selected areas where dockless mobility devices should be made more available. Demand for the devices was more spread out with broader expansion of the central area, noting Central North, Central South, and Central Southeast areas.

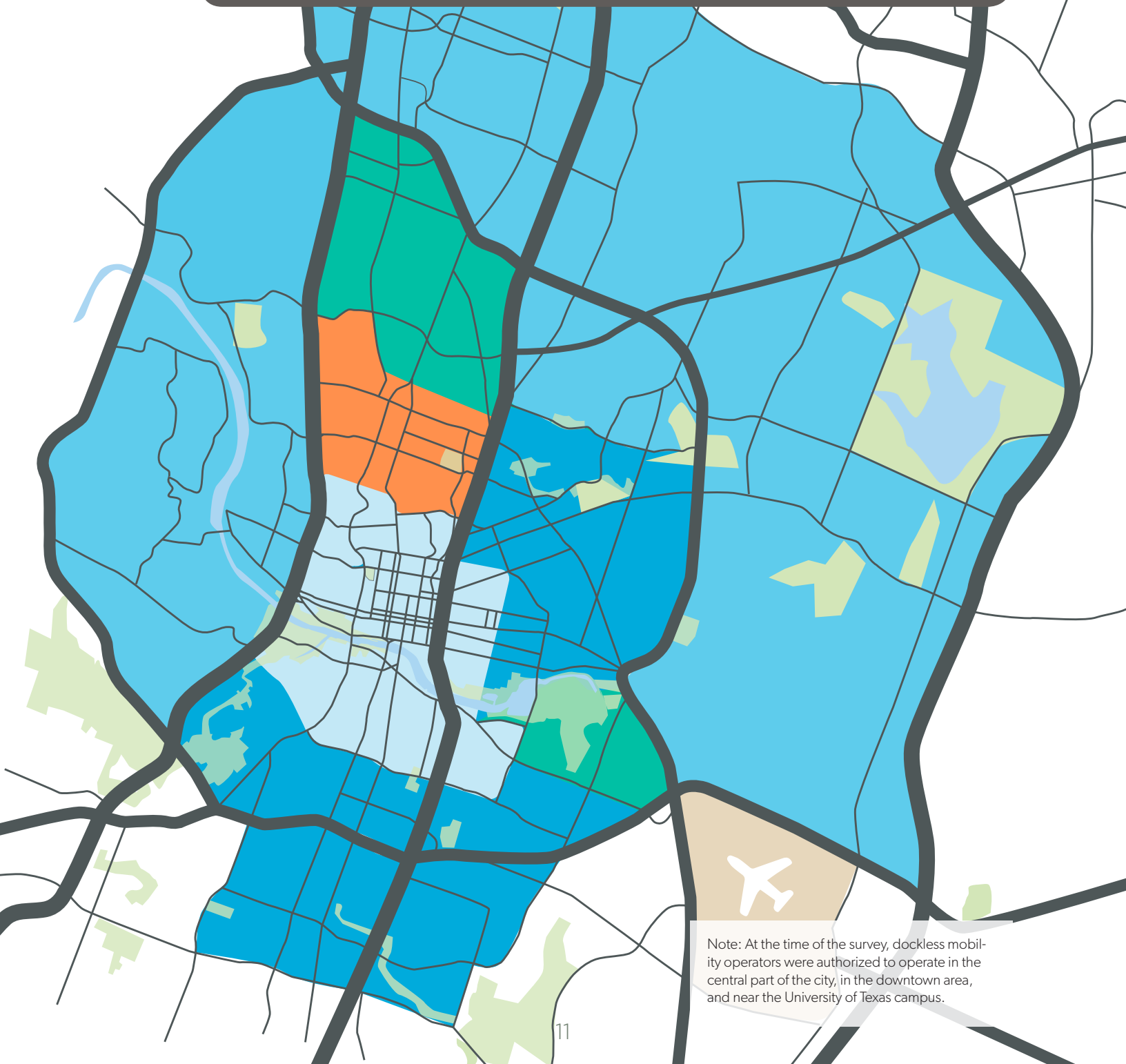
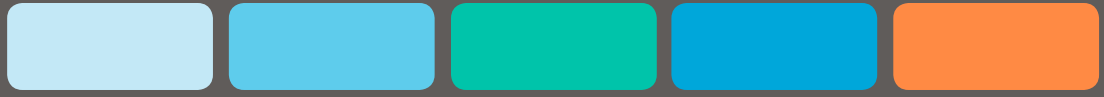
See map on the next page.



PERCEIVED DEMAND FOR DOCKLESS MOBILITY WHERE IT IS UNAVAILABLE

LOW

HIGH



Note: At the time of the survey, dockless mobility operators were authorized to operate in the central part of the city, in the downtown area, and near the University of Texas campus.

Greater Downtown Austin Area (e.g., Chicon Street to MoPac, and Oltorf Street to Martin Luther King Jr. Boulevard) **10.69% / 391**

Central South (e.g., South Lamar, Galindo, Dawson, St. Edward's) **23.66% / 865**

Central Southeast (e.g., Parker Lane, Riverside, Pleasant Valley, Montopolis) **22.18% / 811**

South of Ben White/US 290/SH 71 **23.44% / 857**

University of Texas area, West Campus **13.43% / 491**

Central North (e.g., Rosedale, Hyde Park, Hancock, Windsor Road, The Triangle, North Loop) **26.29% / 961**

North of Anderson Lane/FM 2222 and South of US 183 **21.47% / 785**

Central East (e.g., Holly, Govalle, Rosewood, Chestnut, Upper Boggy Creek, Mueller-RMMA, Johnston Terrace, MLK and East MLK) **24.04% / 879**

Northeast (e.g., Windsor Park, University Hills, Pecan Springs Springdale, Coronado Hills, St. John) **19.15% / 700**

West of MoPac **20.68% / 756**

North and East of US 183 **20.27% / 741**

Other (please specify) **27.22% / 995**



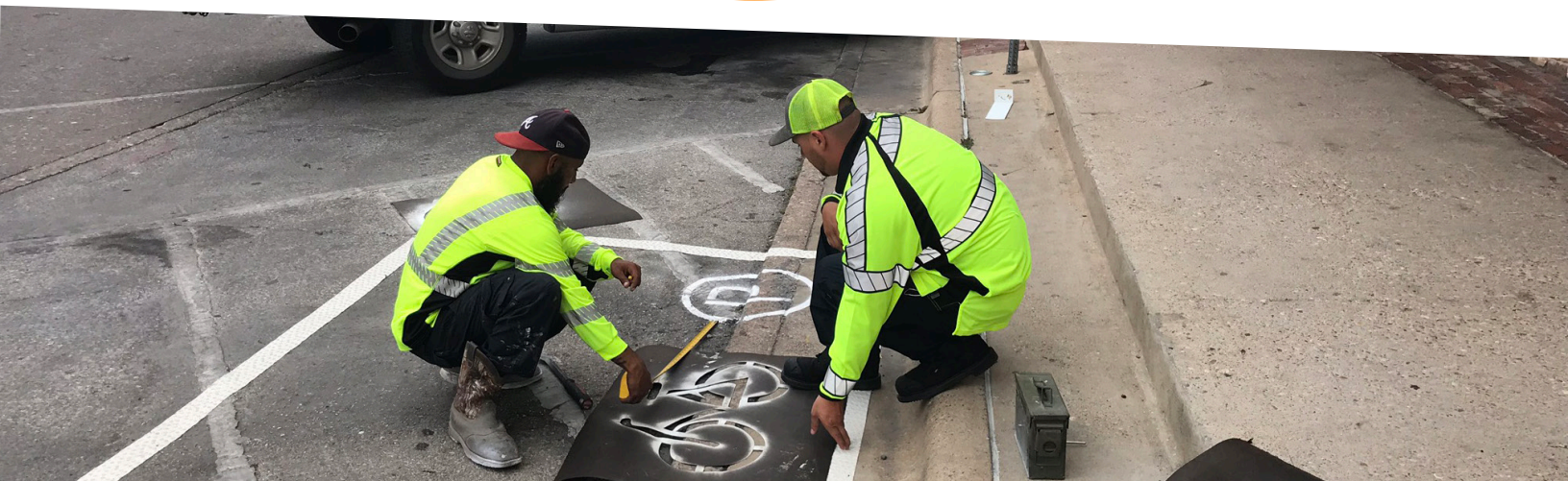
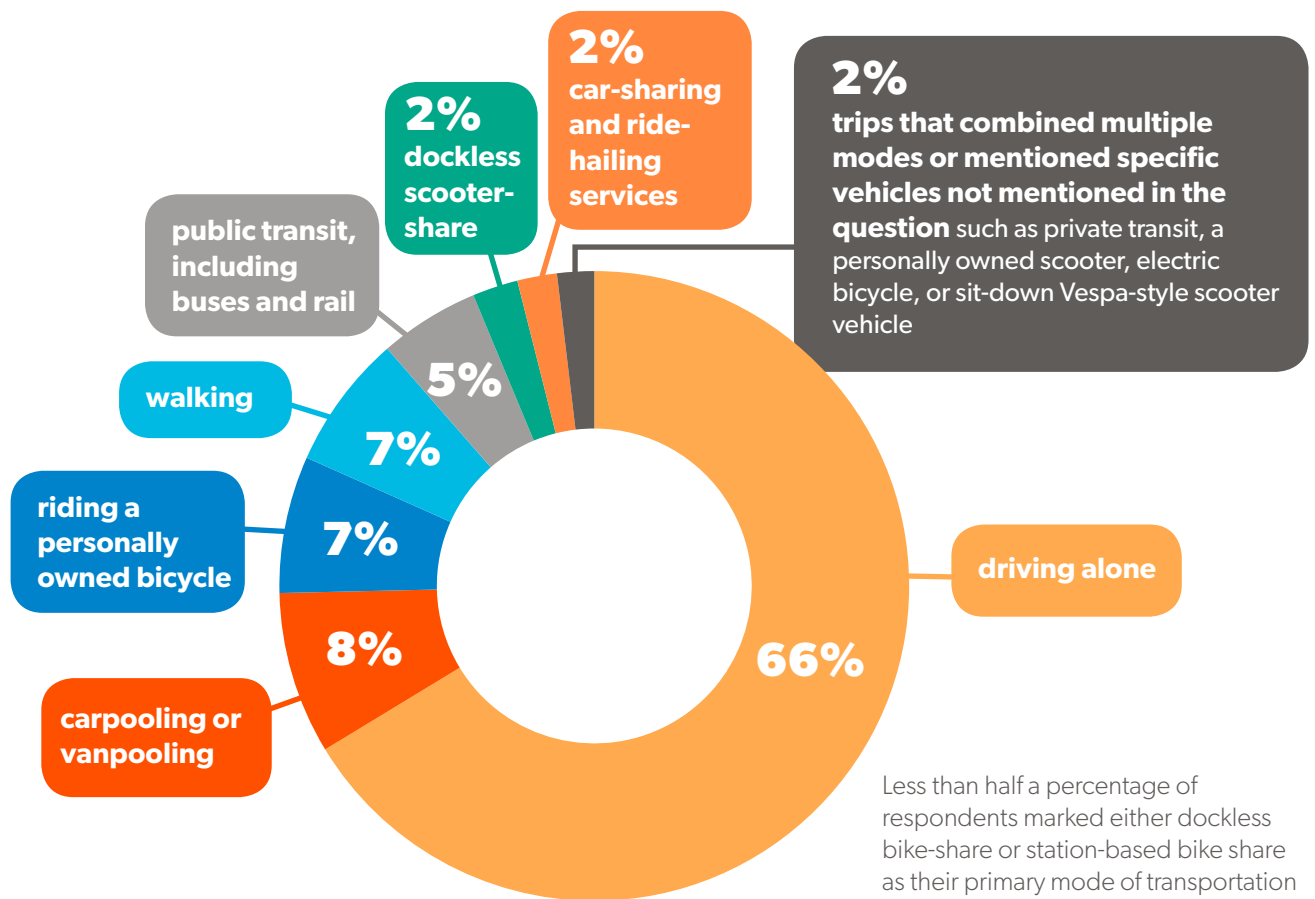
FAVORABILITY OF THE DOCKLESS MOBILITY PROGRAM IN AUSTIN

6,380 respondents provided their opinion of the dockless mobility program currently operating in Austin. The average rating for the dockless mobility program was slightly less than neutral at 2.84, where 1 is very unfavorable and 5 is very favorable.

Reported Mode Use

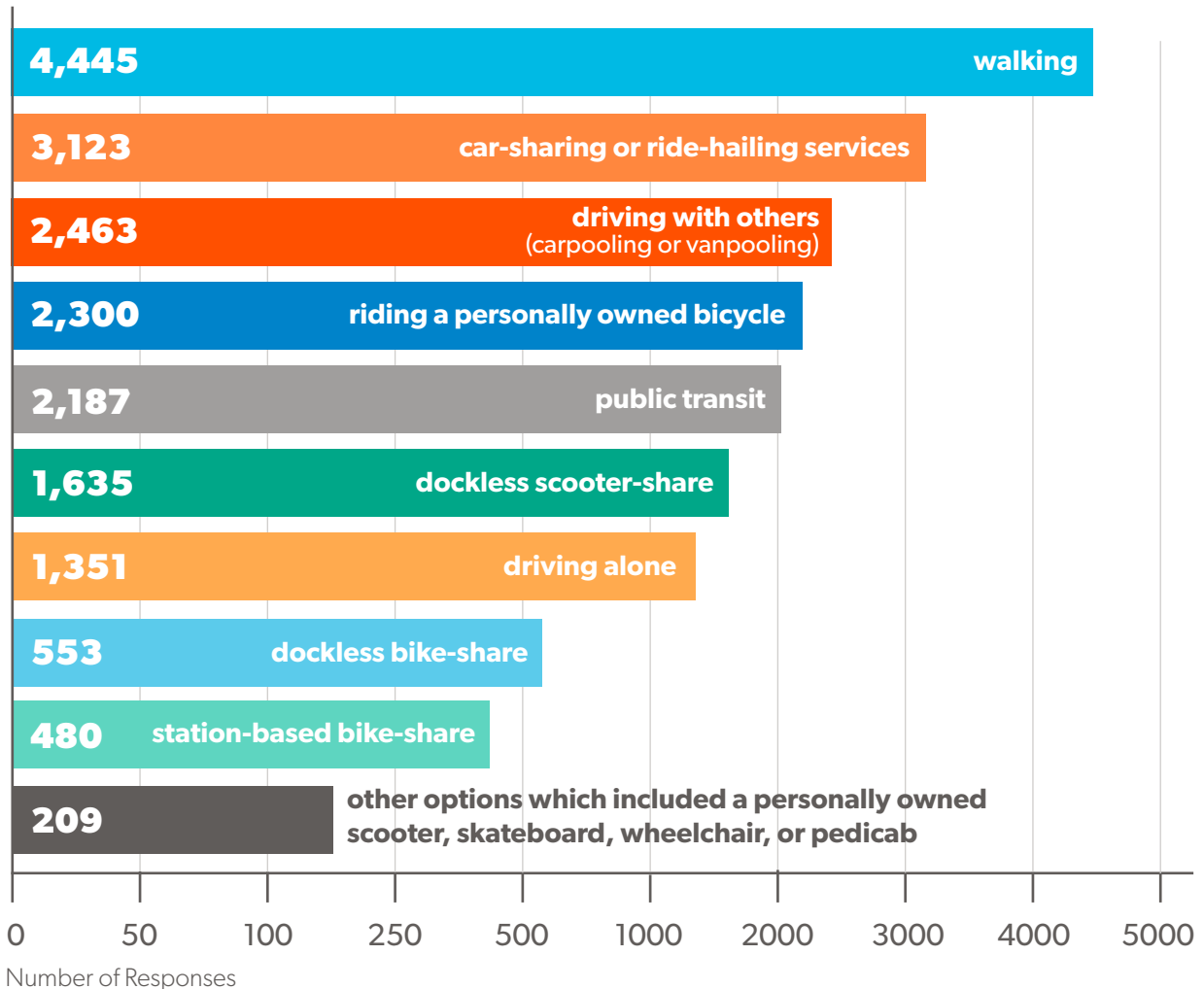
PRIMARY MODE OF TRANSPORTATION

7,178 respondents answered what primary mode of transportation they take. They could select only one option.



ADDITIONAL MODES OF TRANSPORTATION

6,781 respondents were allowed to choose multiple options for what modes of transportation they take in addition to their primary mode.



Open-Ended Responses

The survey received **3,874** open-ended responses, which touched on various aspects of dockless mobility. In order to quantify the data, these aspects were distilled into 32 different categories, and each response was tagged with as many categories as applicable. The tag results are summarized below.

Scooters were mentioned in 62.57% (2,424) of responses, while bicycles were mentioned in 39.91% (1,546). In addition, references to the dockless mobility operators themselves were included in 5.86% (227) of responses, while comments and concerns regarding damage liability and insurance were present in 2.45% (96).

THE TOP 10 THEMES IN THE OPEN-ENDED RESPONSES WERE:

1. Sidewalks (includes mentions of parking or riding on sidewalks): 41.48% (1,607)
2. Safety: 35% (1,356)
3. Regulation and enforcement: 25.14% (974)
4. Parking of devices: 24.91% (965)
5. Education and etiquette on proper dockless mobility use: 17.73% (687)
6. Building supportive infrastructure (bike lanes, bike racks, designated parking areas): 12.80% (496)
7. Accessibility concerns: 12.78% (495)
8. Need for helmets: 12.36% (479)
9. Mobility and traffic congestion: 9.91% (384)
10. Parks and trails: 8.39% (325)

Safety for all people on sidewalks and streets was the primary concern of many responses. Many of the comments overlapped in discussing the need for clearer regulations and communication to the public regarding where dockless scooters and bicycles could travel, whether along streets, sidewalks or bicycle facilities.

EXPRESSED OPINIONS ON DOCKLESS MOBILITY

Comments that expressed favorability toward the dockless mobility program made up 25.25% (978) of responses, with 5.55% (215) expressing the desire for an expansion of the program. Favorable comments specific to dockless scooters made up 13.09% (507) of responses, and favorable comments specific to dockless bicycles made up 9.78% (379) of responses.

Comments that included suggestions to improve the dockless mobility program made up 23.93% (927) of responses. Specific suggestions to improve safety included more enforcement of regulations and a focus on education initiatives to cultivate a norm of safe and proper dockless mobility use.

Comments that expressed unfavorability toward the dockless mobility program made up 18.59% (720) of responses. Unfavorable comments specific to dockless scooters made up 11.49% (445) of responses, and unfavorable comments specific to dockless bicycles made up 2.45% (95) of comments. Some unfavorable comments supported action to remove the dockless mobility program: 5.89% (228) of responses expressed the desire to ban dockless mobility devices, either scooters and/or bicycles; 3.92% (148) wanted to ban only dockless scooters and 0.62% (24) wanted to ban only dockless bicycles.

In 1.80% (70) of comments, respondents negatively viewed dockless mobility devices present in parks and on trails, which were not allowed at the time of the survey, before the City of Austin Parks and Recreation Department launched its electric bike and scooter pilot program in January 2019. 10 comments expressed a desire to allow dockless mobility in parks and on trails.

SPECULATIONS ON THE IMPACTS OF DOCKLESS MOBILITY

Respondents discussed current and potential consequences of dockless mobility across certain aspects for the community at large.

Accessibility concerns: 12.78% (495)

These concerns center on keeping pathways clear for people of all physical abilities. Reported negative impacts from dockless mobility included improperly parked devices blocking sidewalks, ramps and entryways.

Mobility and traffic congestion: 9.91% (384)

Improved mobility was mentioned in 5.6% (217) of responses. Respondents believed dockless mobility had a positive impact in helping people travel short trips without an automobile, thereby potentially reducing traffic in the long term. Mentions of negative or negligible impacts to mobility or traffic congestion made up 0.96% (37) of comments. These comments speculated that dockless mobility did not replace automobile trips, but walking trips instead.

Environmental sustainability: 3.59% (139)

Respondents speculated on mixed potential impacts to the environment. Potential positive impacts include reduced carbon emissions and improved air quality. Potential negative impacts include damage to trail surfaces and pollution to waterways.

Socioeconomic concerns: 4.37% (169)

Some comments discussed potential socioeconomic impacts to the Austin community in terms of affordability and equity. In 2.74% (106) of comments, dockless mobility users discussed the affordability of these services, often viewing them as more affordable than owning a personal automobile. In 1.63% (63) of comments, respondents expressed concerns regarding equitable access to dockless mobility; since dockless mobility operations were limited to a smaller geographic area, they did not appear to serve groups of all incomes or transportation/mobility needs.

AREAS WHERE IMPROVEMENT IS NEEDED

Many comments mentioned the need for infrastructure to support safety, mobility and connectivity. Other comments centered on stronger regulations to make sure the use of dockless mobility devices is safe.

- Building supportive infrastructure (bike lanes, bike racks, designated parking areas): **12.80% (496)**
- Addressing device speed where they can operate: **6.74% (261)**
- Creating more connections to public transit: **4.31% (167)**
- Setting limits to fleet sizes, areas of operation and curfews: **1.96% (76)**



Learn More About Dockless Mobility in Austin

Community members can find more information on current regulations and etiquette on how to properly use dockless mobility services at [AustinTexas.gov/DocklessMobility](https://austintexas.gov/DocklessMobility)