GLOBAL RIDER SURVEY INSIGHTS - JULY 2019

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Rider Survey Insights | Survey Overview

Why?
Estimate how riders replace car trips, connect to transit, etc.
Calculate the impacts of mode shift
Demonstrate impacts of policy (e.g. fleet caps) on demand

How and Where?
Emails to riders via Braze with link to SurveyMonkey survey
89 markets in N & S America, AUS/NZ, Europe
> 18,000 riders responded, with information about > 36,000 rides

What?
Last ride - trip purpose, mode shift
General travel patterns and preferences
Personal and household characteristics (e.g., age, gender, car ownership)
The invasion of the **scooter bros:** A new tribe whizzes past the haters on Washington sidewalks.

Who’s riding those scooters around San Francisco? We’ll give you a hint, **bro**
Rider Survey Insights | Trip Purposes

Local vs Visitor

82% Local  18% Visitor

Trip Purpose on Most Recent Rides

37% Commute (to/from work/school)
28% Social (to/from dining/entertainment)
14% Errands (to/from shopping/errands)
13% Joyride (no particular destination)
9% First/last-mile (to/from public transit)
Why did you choose a scooter on your most recent trip?

- **Fast**
  - 28.44%
  - 5.93% Affordable
  - 3.94% Easy
  - 2.89% Social
  - 2.70% Flexible
  - 1.93% Sustainable
  - 1.12% Access to transit

- **Convenient**
  - 19.51%

- **Fun**
  - 28.10%
Rider Survey Insights | **Mode Shift**

**Trips replacing vehicle rides**
- Taxi or ride hailing (e.g., Uber, Lyft)
- Personal vehicle
- Carshare
- Shared moped

**Trips replacing other modes of mobility**
- Public transit (e.g., bus, subway, rail)
- Docked bikeshare
- Other dockless bike/scooter
- Personal bicycle
- Personal e-scooter
- Trip wouldn’t have been made
- Other

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<th>Mode</th>
<th>13.5%</th>
<th>9.3%</th>
<th>1.1%</th>
<th>0.5%</th>
<th>13.7%</th>
<th>42.9%</th>
<th>1.8%</th>
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Within the last month: 24.6%
Within the last week: 23.4%
48% - Never
4.9% - Within 6 months
1.1% - Within a year
0.5% - Over a year ago
45.5% - Never

Trips to or from public transit