

RACV e-scooter Research Findings

December 2019



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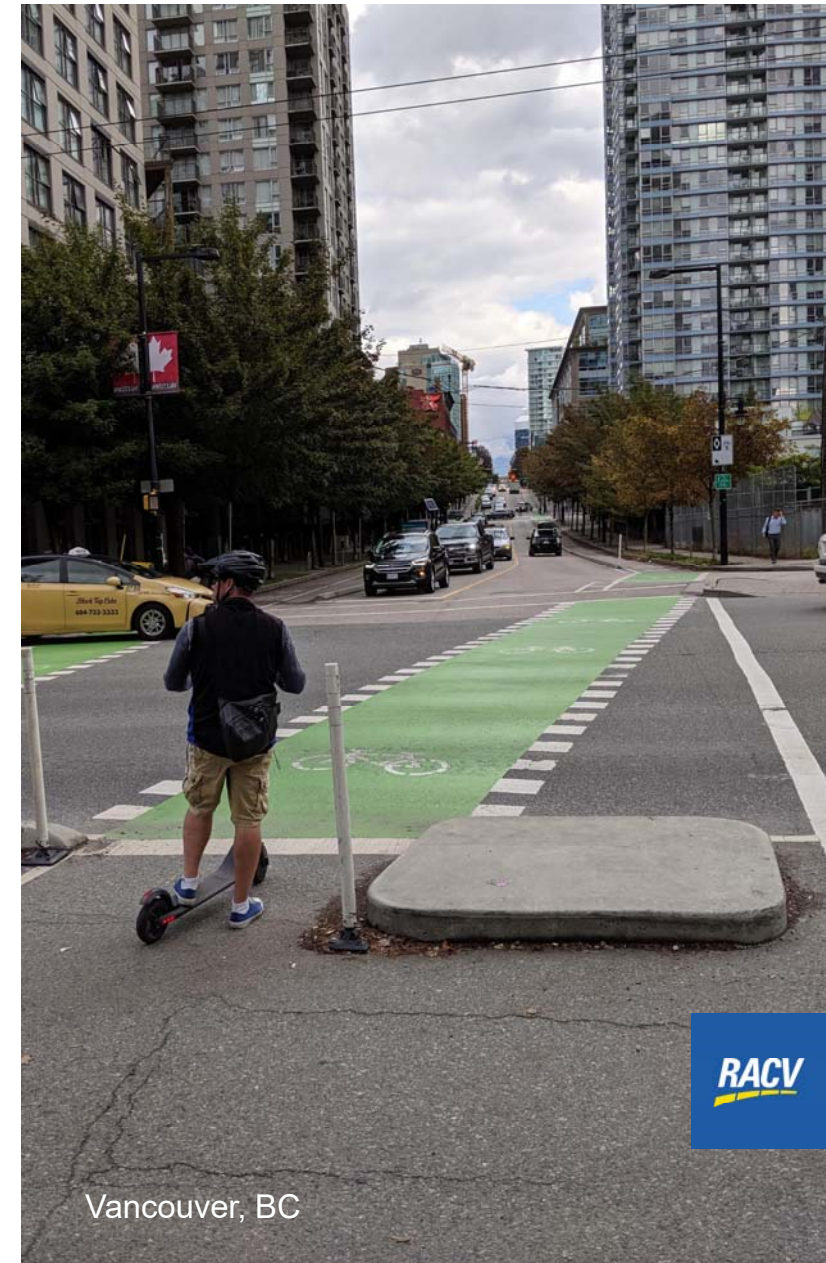
The RACV logo is located in the top right corner of the slide. It consists of the letters "RACV" in a bold, blue, sans-serif font, positioned above a white, curved graphic element that resembles a stylized horizon or a road. The entire logo is set against a solid yellow rectangular background.

1. Introduction

RACV is committed to improving the mobility and wellbeing of Victorians. We believe in an integrated transport network that moves people safely, efficiently and equitably. E-scooters have the potential to address gaps in Victoria's transport network, by providing choice in areas where transport options are limited or non-existent.

What are e-scooters?

- E-scooters are a form of micro-mobility, they are typically two wheeled and propelled by an electric motor. See image on the right.
- These transport devices are emerging around the world, with a presence in Brisbane and Adelaide.
- E-scooters that are over 200 watts and go faster than 10km/h on level ground cannot be legally used on roads or footpaths in Victoria.
- In cities where higher powered e-scooters are legal, there is usually the presence of e-scooter rental companies such as Ride, Lime and Beam. These rental e-scooters can often be found on footpaths or docking locations and can be hired by downloading an application on a smartphone.



Vancouver, BC

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2. Method

Objectives;

- The survey sought to gauge:
 - Interest in e-scooter use;
 - Potential trip types they might be used for (i.e. commute, leisure);
 - Reasons for using them (i.e. to avoid congestion, cheaper transport);
 - Barriers to their use;
 - Where e-scooters should be allowed (i.e. on road, footpaths, shared paths);
 - Potential age restrictions.



Portland, Oregon

2. Method

- In October 2019, RACV released a short online survey, aimed at tapping into people's perceptions and attitudes towards e-scooters.
- The survey received 1442 responses with a run-time of approximately 3 weeks.
- A Royal Auto article was developed to inform RACV members about what e-scooters are and the legality of them in Victoria.
- This Royal Auto article contained a link to the survey, which was posted on the Royal Auto website and was promoted through RACV's eNews.
- Everyday Victorians and RACV members were further engaged by sponsored Facebook posts.

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The logo for RACV, featuring the letters "RACV" in a bold, blue, sans-serif font. Below the letters is a white, curved graphic element that resembles a stylized road or a wave. The logo is positioned on a yellow rectangular background.

3. Results

Headlines;

- Strong demand: 79% of respondents would consider using an e-scooter.
- Reasons for interest are varied: ranged from environmental reasons, to avoiding congestion, to the 'fun factor'.
- Concerns relate to safety: behaviour of other road users, unsafe infrastructure, and concerns regarding the safety of the vehicles themselves.
- Strong support for share/rental schemes: 71% of respondents indicating that e-scooter rental schemes should be allowed.



3. Results

Public Participation - Location

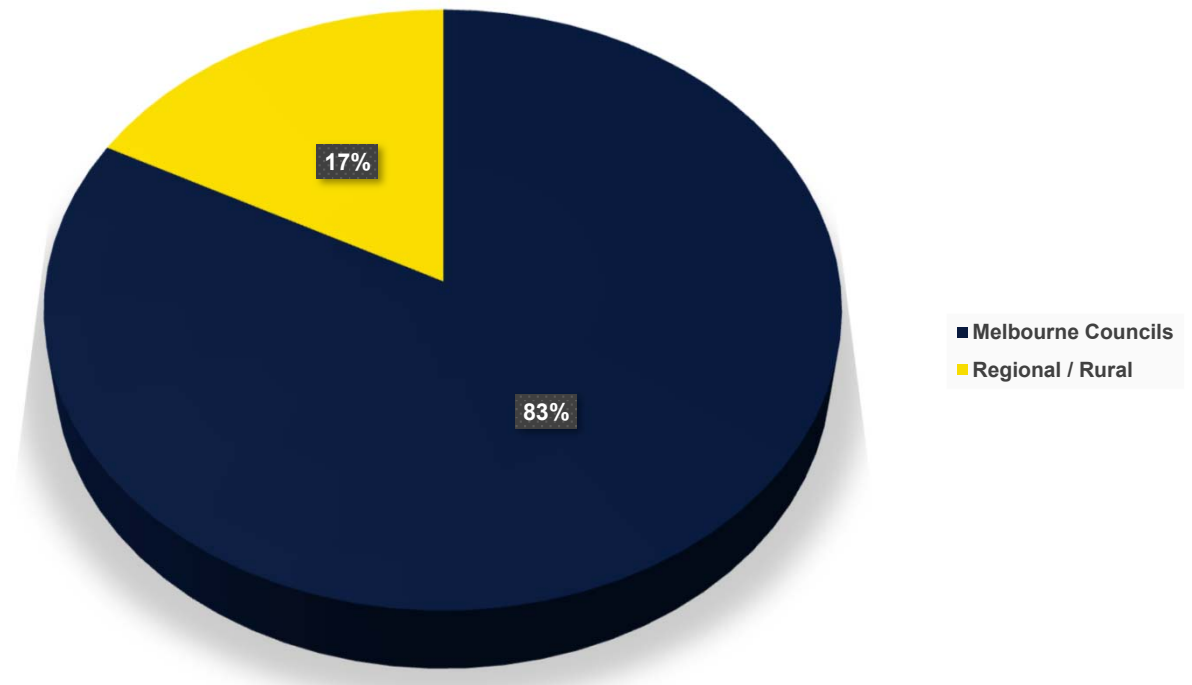
1442 members of the public participated in the survey:

- 908 were located within Melbourne councils
- 189 were located in rural and regional areas
- 345 did not provide their postcode

Only one answer could be selected.
Total survey responses: 1442

Who responded to our survey.

Participation by location



3. Results

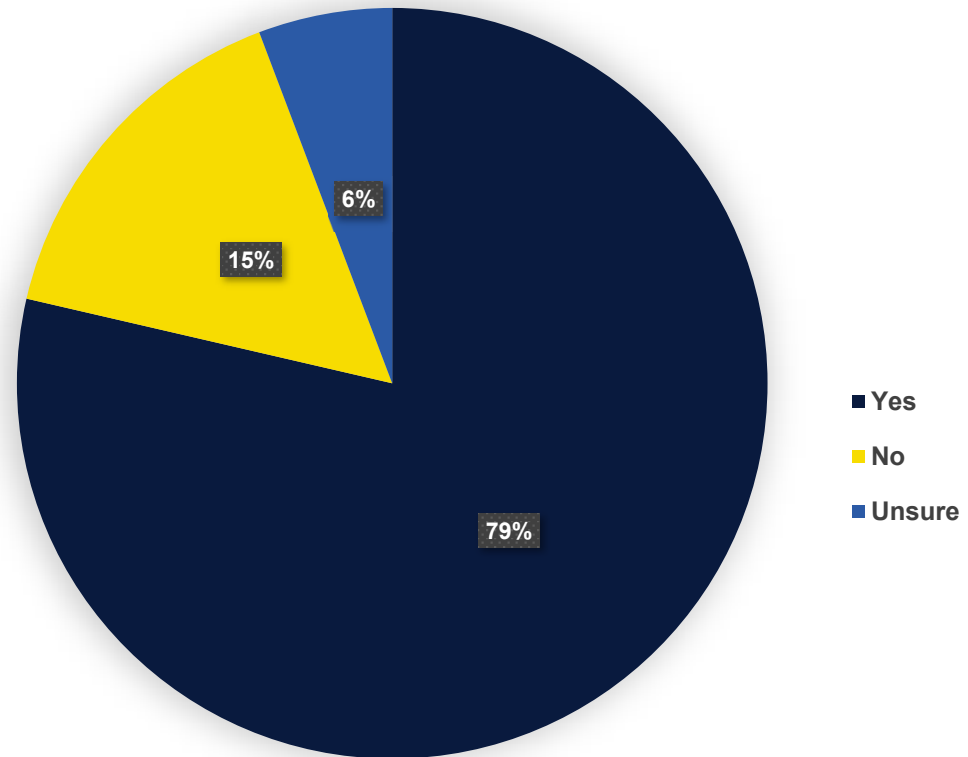
Responses

- 1134 (79%) respondents would consider using an e-scooter.
- 225 (15%) respondents would not.
- 83 (6%) respondents were unsure.

1442 survey participants answered this question.

Only one answer could be selected.
Total survey responses: 1442

Would you consider using an e-scooter yourself?



3. Results

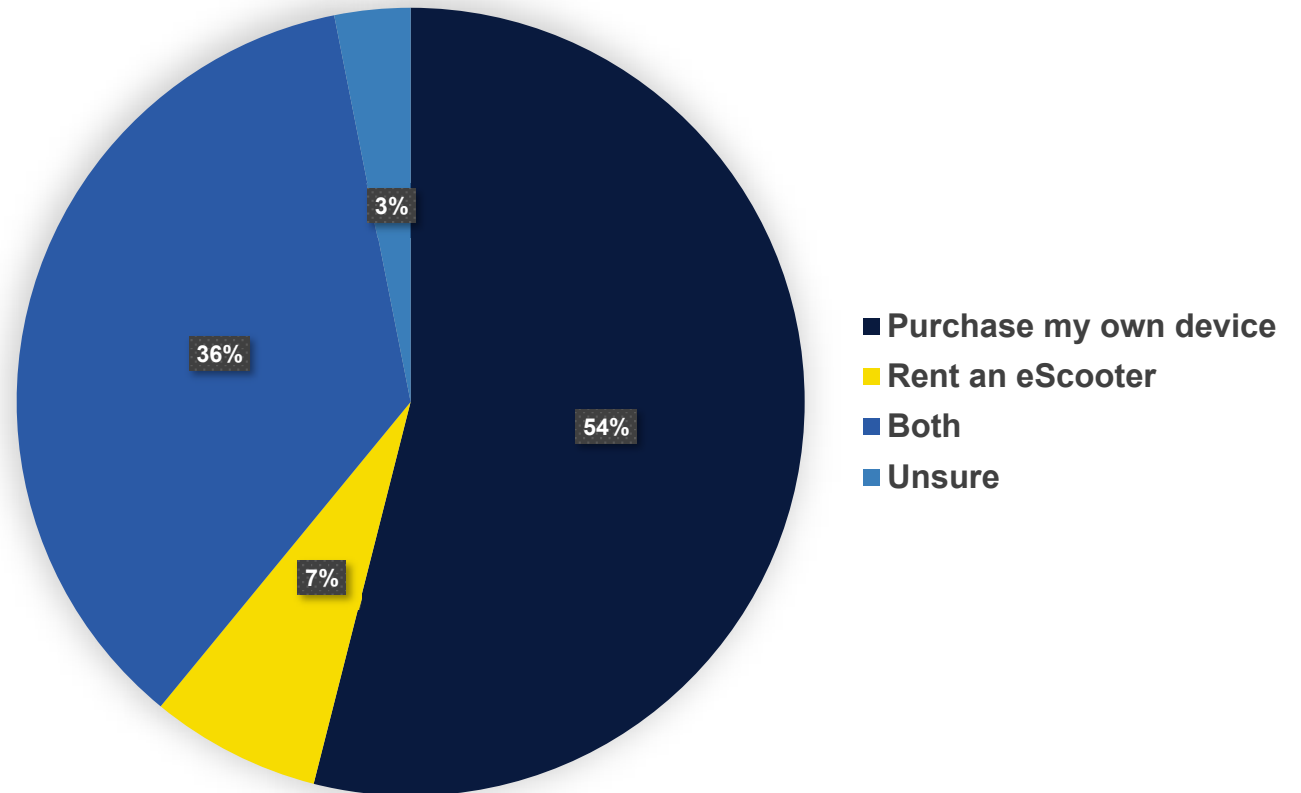
Responses

- 572 (54%) respondents selected “I would rather purchase my own device”.
- 381 (36%) respondents selected “Both”, meaning they would like to purchase their own e-scooter and/or rent one through a hire/share scheme.
- 74 (7%) participants selected “I would rather rent an e-scooter.”
- 33 (3%) respondents selected “Unsure”.

1060 survey participants answered this question.

Only one answer could be selected.
Total survey responses: 1442

Would you rather purchase or rent an e-scooter?



3. Results

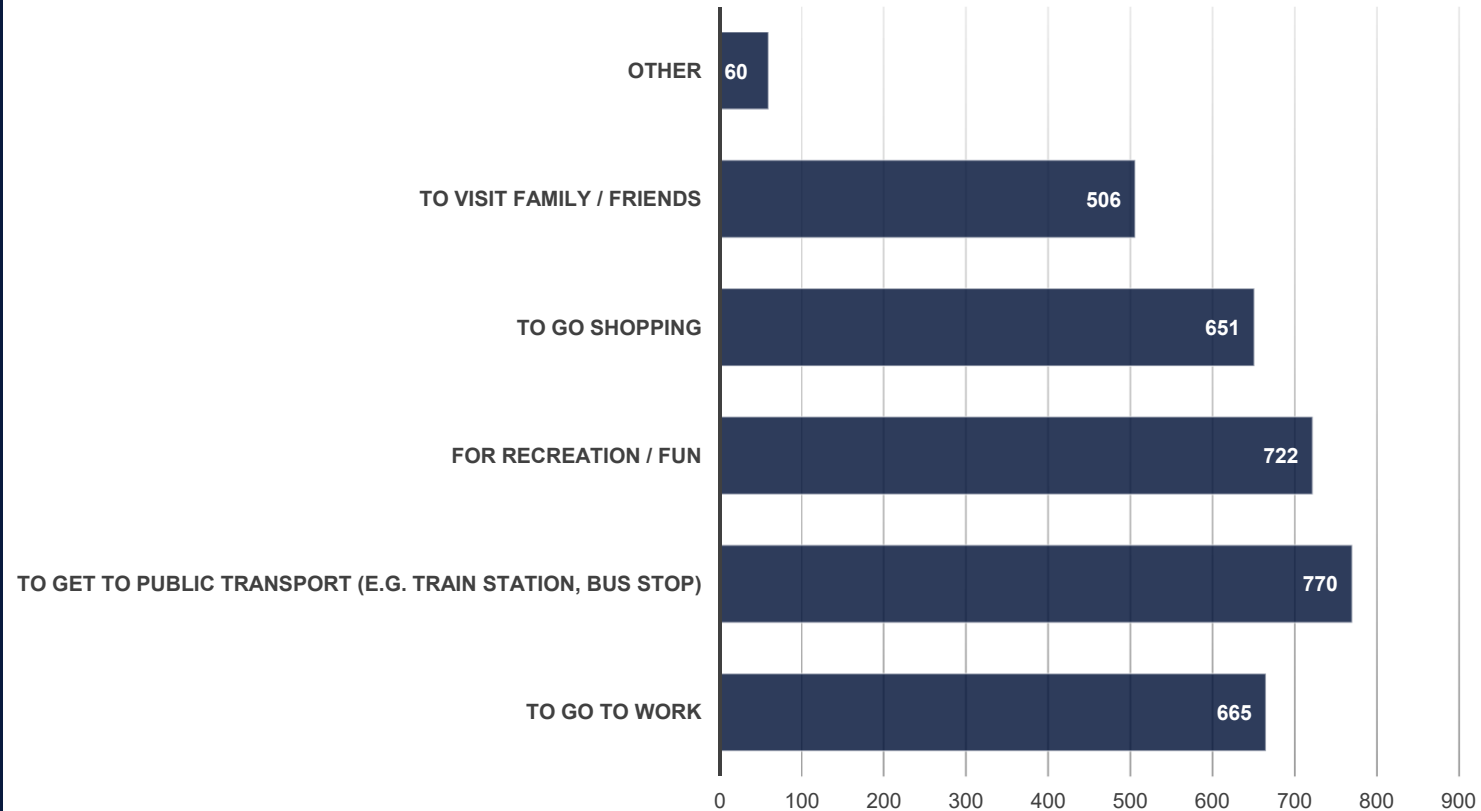
Responses to this question were varied, demonstrating that people want e-scooters for a diverse range of trips.

To get to public transport received the highest response rate.

1057 survey respondents answered this question.

Multiple answers for this question could be selected.
Total survey responses: 1442

What trips would you use the e-scooter for?



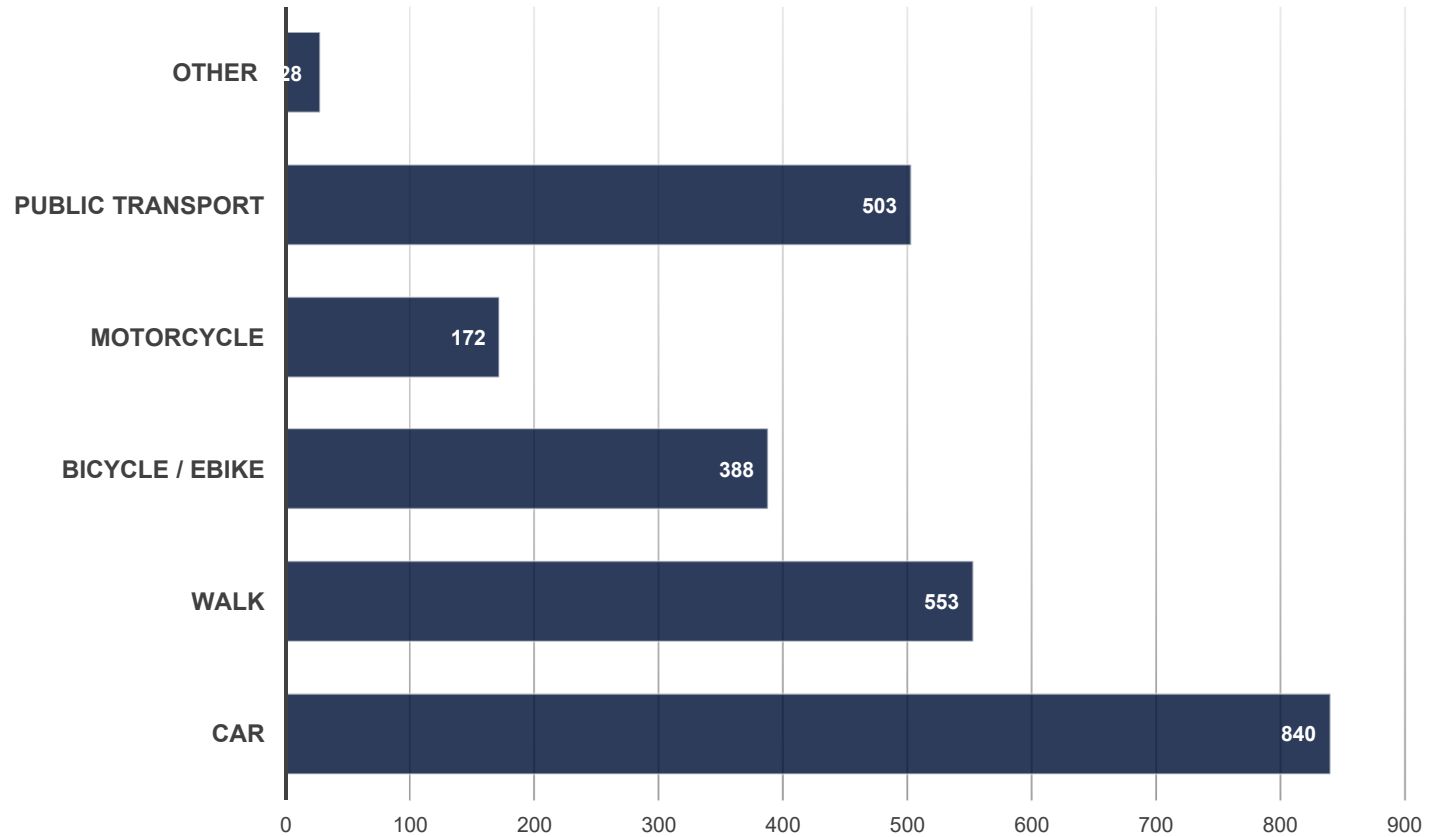
3. Results

Survey participants told us that they would use e-scooters to replace car trips, followed by walking and public transport.

1282 survey respondents answered this question.

Multiple answers for this question could be selected.
Total survey responses: 1442

What main trips will the e-scooter replace?



3. Results

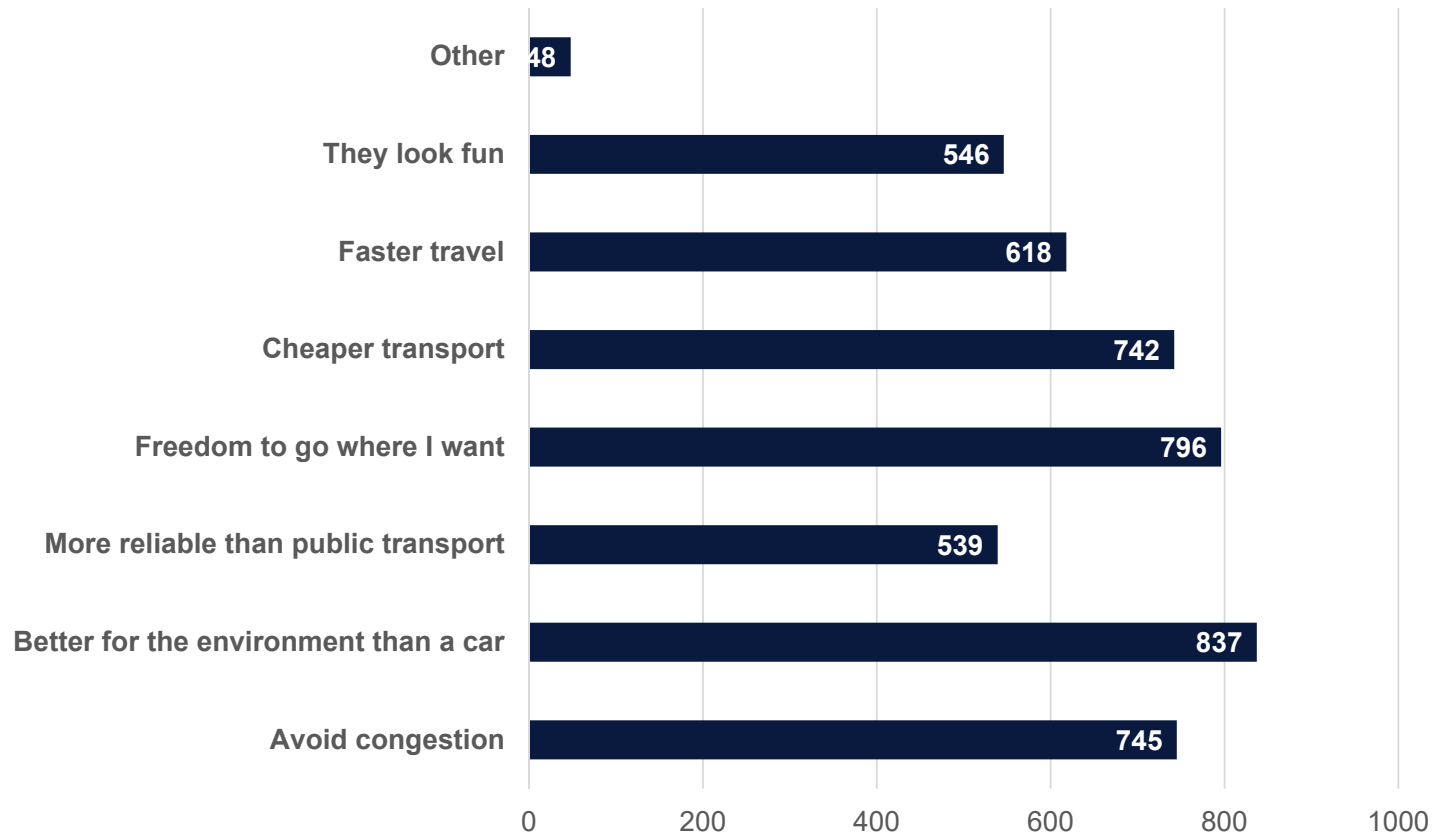
Better for the environment than a car received the highest amount of responses.

Responses overall were varied, demonstrating that people want e-scooters for differing reasons.

1057 survey respondents answered this question.

Multiple answers for this question could be selected.
Total survey responses: 1442

What factors would make you consider using an e-scooter?



3. Results

Survey participants mainly had concerns about safety.

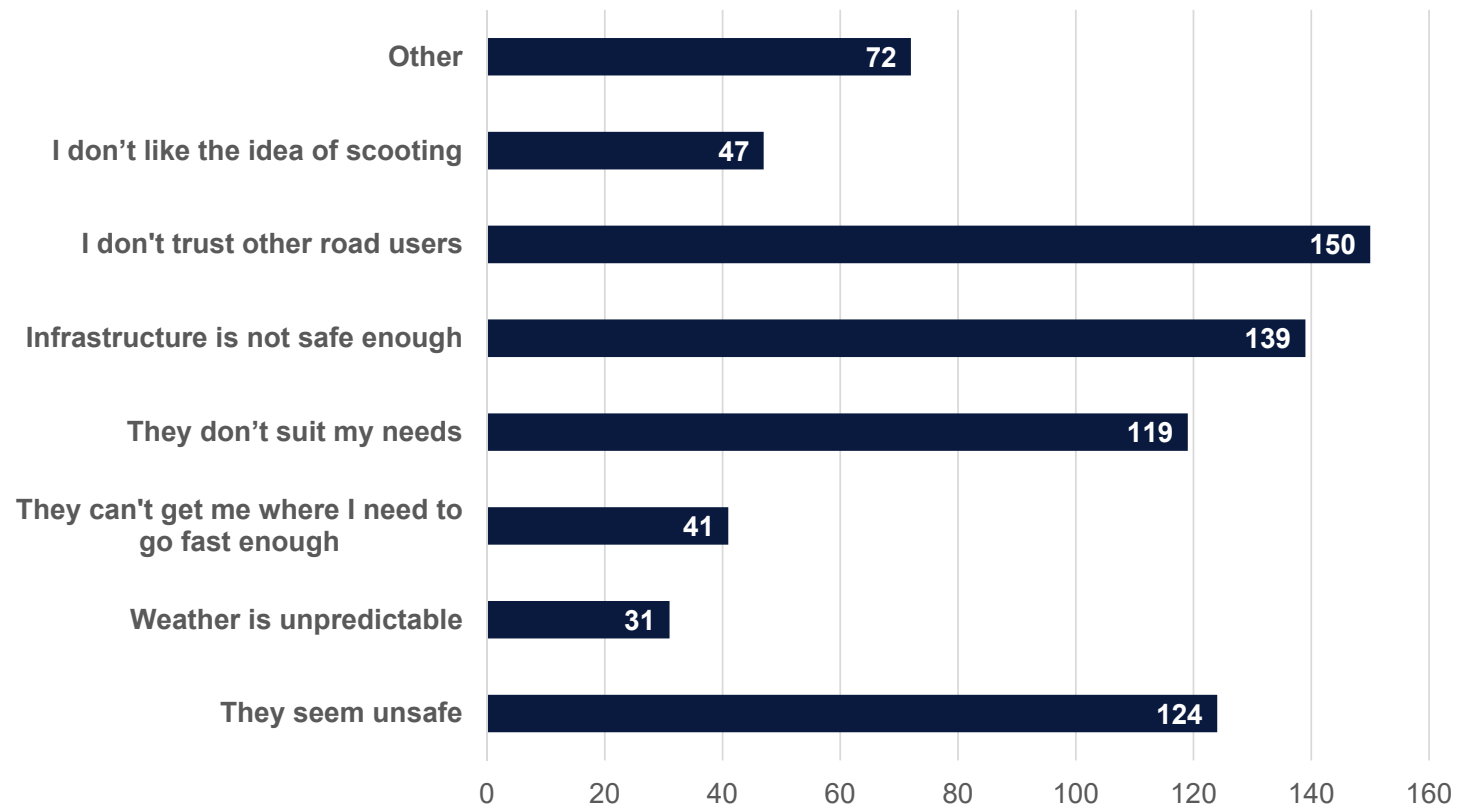
The biggest reasons as to why participants would not consider using an e-scooter was a lack of trust in other road users and unsafe infrastructure.

There were fewer responses for reasons against using an e-scooter, compared to reasons for using one.

290 survey respondents answered this question.

Multiple answers for this question could be selected.
Total survey responses: 1442

Why wouldn't you consider using an e-scooter?



3. Results

Responses

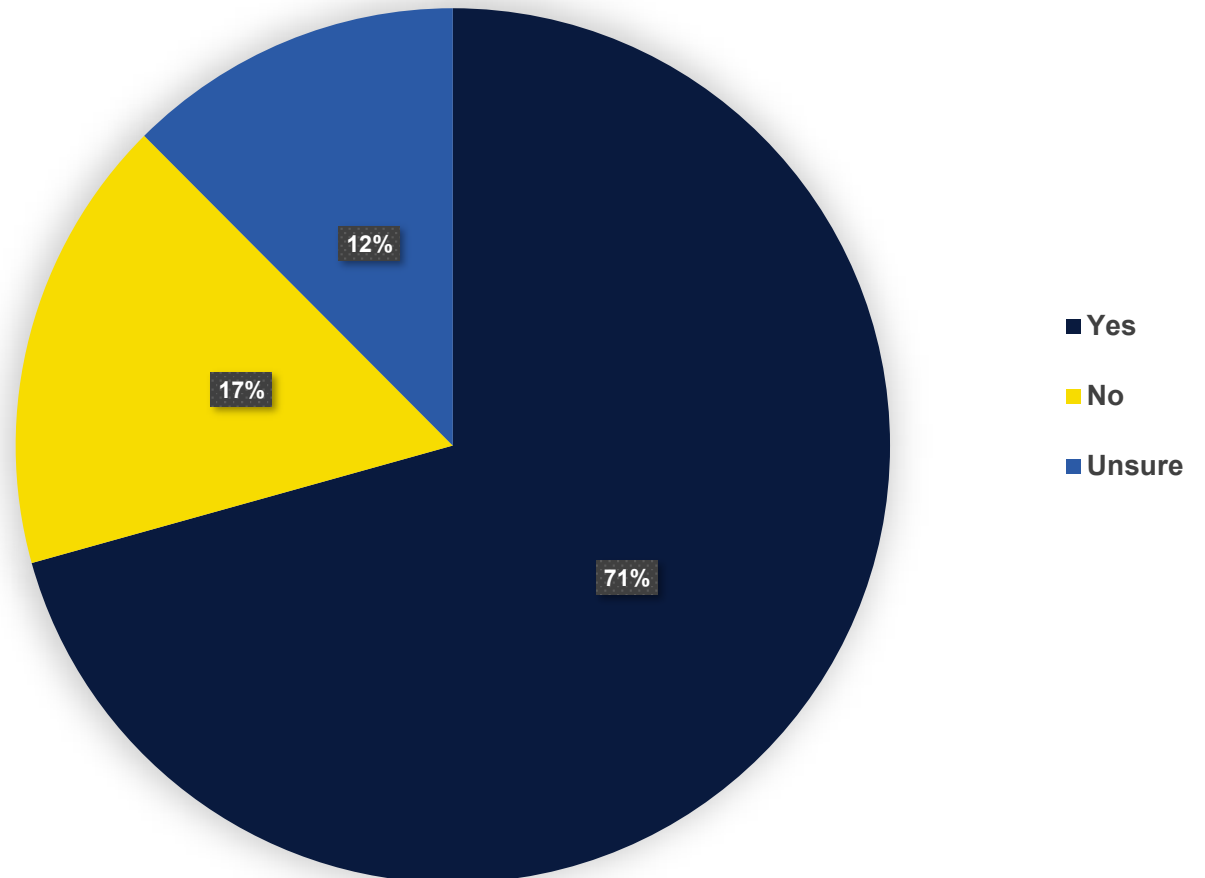
- Yes – 935
- No – 223
- Unsure – 165

Rental e-scooter companies include those such as Lime, Ride, Beam.

1324 survey respondents answered this question.

Only one answer could be selected.
Total survey responses: 1442

Should rental e-scooters be allowed in Victoria?



3. Results

Responses

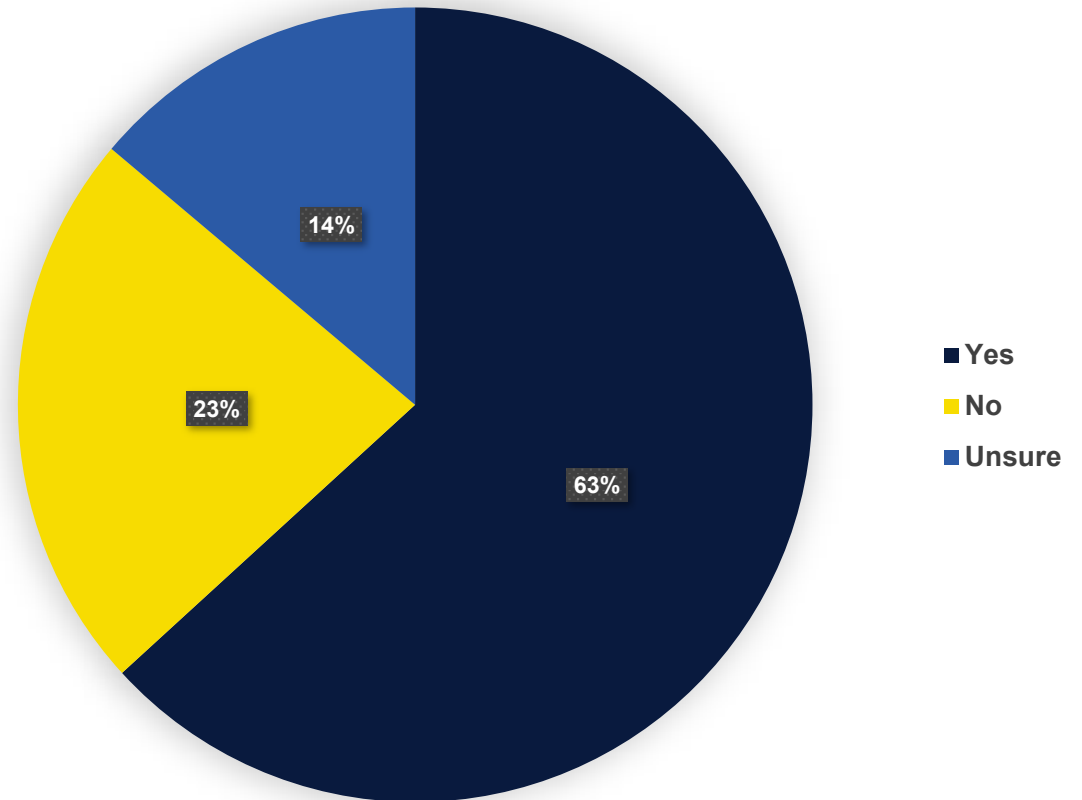
- Yes – 835
- No – 303
- Unsure – 83

63% of people would consider purchasing an e-scooter for friends or family, if they were legal.

1321 survey respondents answered this question.

Only one answer could be selected.
Total survey responses: 1442

Would you consider purchasing an e-scooter for a friend or family member?



3. Results

The main locations identified where e-scooters should be used:

- Shared Paths / Bicycle Paths
- Bicycle Lanes

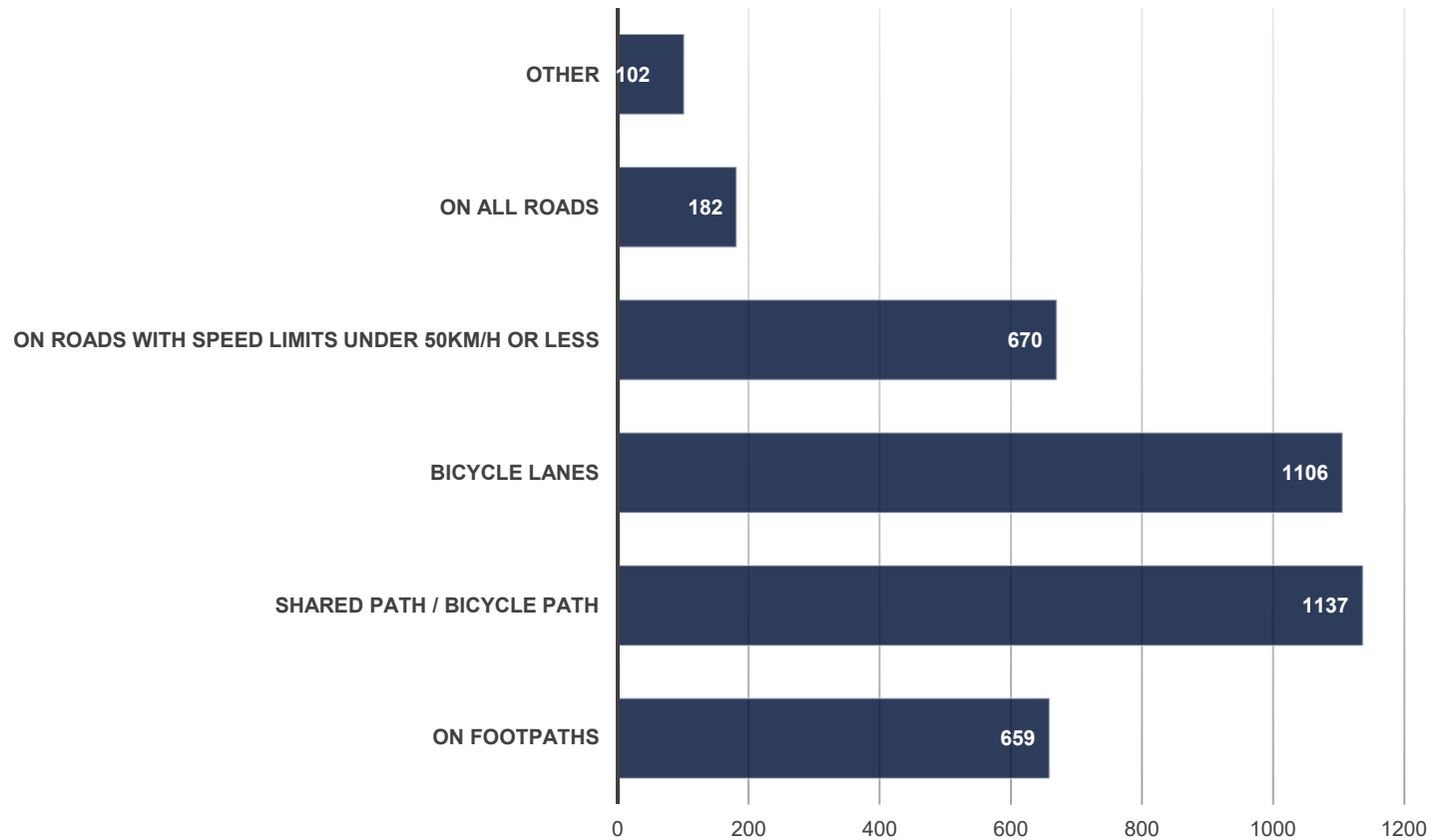
Other locations included:

- Similar locations and rules to bikes
- Footpaths at speed of 10km/h or less
- Roads over 50km/h in separated bike lanes

1322 survey respondents answered this question.

Multiple answers for this question could be selected.
Total survey responses: 1442

Where should e-scooters be used?



3. Results

Reponses

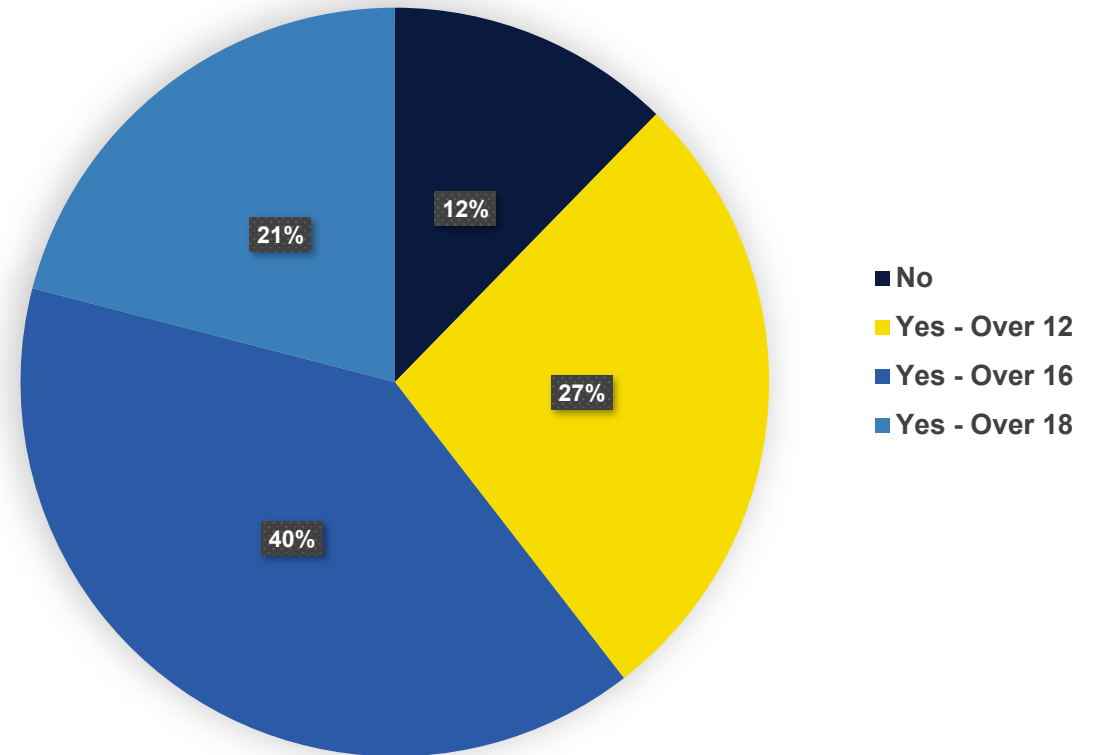
- No – 162
- Yes, over 12 – 358
- Yes, over 16 – 520
- Yes, over 18 – 276

Note: this question did not differentiate between personal e-scooters and rentals.

1316 survey respondents answered this question.

Only one answer could be selected.
Total survey responses: 1442

Should there be a legal age for using e-scooters?



3. Results

Public Participation - Demographics

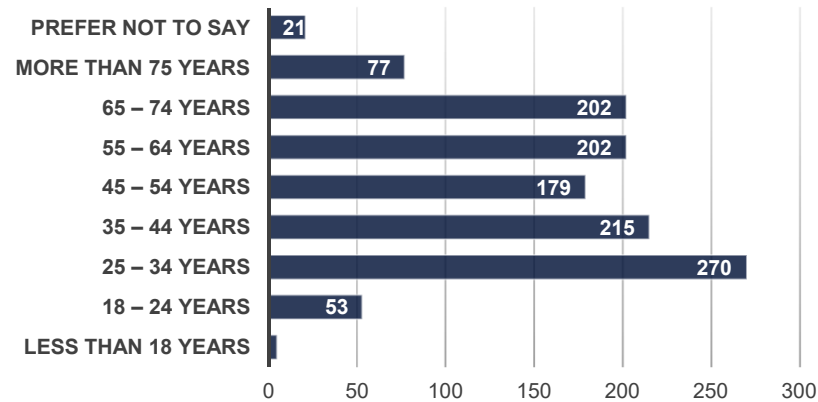
1224 survey participants answered "What is your age bracket?".

1217 survey participants answered "What is your gender?".

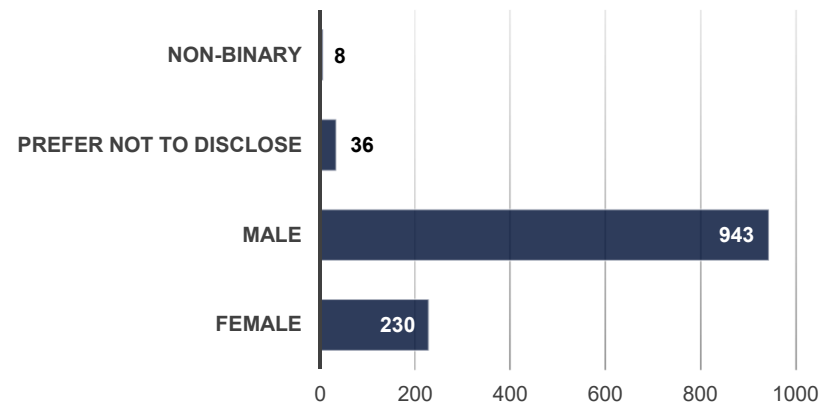
Only one answer for each question could be selected.
Total survey responses: 1442

Demographics

Age Bracket



Gender



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Headlines;

- 79% of survey respondents told us that they would use an e-scooter.
- Overall, respondents would rather use their own e-scooter than use a hire/share scheme.
- People want e-scooters for different reasons:
 - To travel in a more environmentally friendly way,
 - To get to public transport,
 - To get to work,
 - To have more freedom,
 - To have fun.
- Respondents raised safety concerns, expressing distrust in other road users and perceiving the existing infrastructure as unsafe.
- Respondents were further concerned about the safety of the e-scooters themselves.



4. Summary

- The results have revealed that there is support for e-scooters in Victoria.
- E-scooters are here. Available to buy online and in Australian retail outlets.
- Globally, we are seeing public e-scooter hire/share schemes expand and become viable in their local contexts.
- Many benefits; micro-mobility is filling different gaps in the transport system for different people. This is a good thing.
- The issue; they are currently, for the most part, illegal to use in Victoria.
- There's a disconnect between innovation in the transport sector, policy and regulatory tools that govern their use.
- Not without concerns. Safety, the risk profile of riding them, and the impact parked e-scooters may have on the public realm are all relevant issues to explore.



San Francisco, California

RACV

The logo features the word "RACV" in a bold, blue, italicized sans-serif font. Below the text is a yellow graphic element consisting of a curved line with three vertical bars, resembling a stylized road or a speed indicator.

RACV

A smaller version of the RACV logo, featuring the word "RACV" in a bold, blue, italicized sans-serif font with a yellow curved graphic element below it.