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Local Policies for Better Micromobility

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Project Objective

To better understand the landscape of micromobility regulation and the effectiveness of different policies and regulatory processes, we interviewed regulators in ten different cities across the United States. These interviews were designed to gather information about five aspects of micromobility adoption and regulation: 1) general thoughts on micromobility 2) micromobility's introduction and initial regulation 3) the state of micromobility and its regulation at the time of the interview 4) the future of micromobility and its regulation and 5) the impacts of COVID-19 on micromobility.

Problem Statement

The rapid growth of micromobility, which includes shared e-scooters and bicycles, seems poised to continue. There is a distinct need to understand which policies are most effective in maximizing the benefits and minimizing the issues for micromobility services. There is also a need to understand how different micromobility policies affect broader transportation systems, and to identify best practices for policy consistency across jurisdictional boundaries.

Research Methodology

The cities shown in Table 1 were selected for interviews based on their policies and penetration of micromobility. The selection criteria prioritized obtaining a sample that was diverse in population size, degree of regulation, geographic location, and micromobility penetration.

Table 1: State of Micromobility at Start of Project (Early 2019)

City	Regulatory Type	E-Scooter Penetration
Atlanta, Georgia	Restrictive	Low
Austin, Texas	Permissive	Very High
Chicago, Illinois	Mixed	Low/Pilot
District of Columbia	Mixed	High
Denver, Colorado	Temporary Ban	Temporary Ban
Los Angeles, California	Mixed	High
Oakland, California	Mixed	High
Portland, Oregon	Permissive	Medium
San Diego, California	Restrictive	Temporary Ban
Seattle, Washington	Pilot program	Low

Interviews were conducted from April 2020 to February 2021 with lead city micromobility officials. The majority of these individuals dealt specifically with e-scooters, as e-bikes were less common within our sample. We also received information about regional policies and their interaction with local regulation in a few cities. The interview structure was flexible and conversational, but we coded the interviews on a number of key metrics, including perceived challenges and new policies. Interviewees were also asked to quantitatively assess their optimism about the future of micromobility and their overall experience with introducing and piloting micromobility in their cities.

Results

Our results identified several common policy and regulatory process themes among these ten cities:

- There was a consensus that data-sharing requirements are critical for evaluation and monitoring for compliance with policies like distributional requirements to ensure equitability of access.
- Cities see clear safety requirements, of riders and providers, as beneficial in reducing accidents.
- Common among the sample were sentiments that clearer parking regulation is necessary though the specific policies vary widely, and only one city recently implemented a fine policy. There is some agreement that fines for incorrect parking and usage need to be passed to the user to actually influence behavior, rather than the provider.
- Some cities see flexibility in instituting, evaluating, and adjusting regulations to be extremely helpful in the fast-changing world of micromobility.
- Many cities reported benefits from building open communication channels with other cities and micromobility providers.
- Looking forward, some cities see having clear classifications of micromobility device types as helpful for directing safety guidance, implementing protocols, and updating regulations over time as the types of unique devices continue to evolve.

Cities in our sample ranked their experiences with micromobility on a five-point scale, with five being the most positive. Overall, the average city had a middling experience with the introduction of micromobility (3.00) with slightly better experiences with pilots (3.58) and higher optimism for the future of micromobility (3.85). Cities that launched a pilot reported more positive experiences with the introduction of micromobility (3.40) compared to those with more open licensing systems (2.50). This difference is even larger between cities with a “competitive” pilot versus an “open” pilot (4.00 vs. 2.50).

However, the two cities that had an open pilot had marginally better average experiences (4.0) with their pilots than the cities with competitive pilots (3.38). Unsurprisingly, cities that reported an unauthorized launch of e-scooters reported much lower introduction scores (2.13) than those with a coordinated launch (3.70).

Importantly, initial experiences are not predictive of views towards the future of micromobility. Cities with unauthorized launches, immediate licensing, and open pilots, all of which had the lowest average experience with the introduction of micromobility (2.13, 2.50, 2.50), all reported the highest optimism for the future of micromobility (4.30, 3.88, 4.25). In contrast, cities with limited pilots and those that had coordinated launches reported lower optimism for the future of micromobility (3.63, 3.40).

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