

Memorandum to the Board of Directors

Powered Scooter Share Permit Program Evaluation



TO: SFMTA Board of Directors
Amanda Eaken, Chair
Stephanie Cajina, Vice Chair
Steve Heminger, Director
Dominica Henderson, Director
Fiona Hinze, Director
Lydia So, Director
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THROUGH: Jeffrey Tumin, Director of Transportation

FROM: Kate Toran, Director of Taxis, Access & Mobility Services

DATE: October 17, 2023

SUBJECT: Powered Scooter Share Permit Program Evaluation

The SFMTA retained the services of consultant group Fehr & Peers (consultant) in early 2023 to evaluate the agency’s Powered Scooter Share Permit Program. Fehr & Peers was retained to provide an independent analysis of the program, including the existing permit structure, device utilization, anti-sidewalk riding technologies, and equitable access to scooters among other aspects of the program.

As part of the program evaluation, the consultant administered a scooter share rider survey, analyzed programmatic data, conducted peer city interviews and interviews with public officials in San Francisco. The report is included with this cover memo and is also posted [here](#).

Key Findings and Takeaways

- **Program Ride Analysis:** 1.7 million rides provided in 2022, with each scooter utilized an average 1.7 times per day, with significant seasonal variation, with most trips occurring in the summer months. Scooter share trips are highly concentrated - 80% occur in the northeast neighborhoods of the city. These neighborhoods have a dense built environment and fewer car parking options.
- **Trip Summary:** The average trip length is 1.5 miles and trip time of 16 minutes. According to the rider survey, scooter share trips are most often used to get to or from a social or entertainment activity (30%) or for work and school (27%).
- **Rider Survey:** Respondents would have used alternative transportation choices like walking (33%), ride-hailing services (28%), and public transit (21%) if scooter share was not available. About 27% of respondents connected to public transit through scooter share trips, particularly BART and Muni bus services.
- **Peer City Feedback:** Discussions with six peer cities operating successful scooter share programs were useful in developing an understanding of the regulatory structure and

outcomes of similar programs in the United States and were used in developing the program recommendations.

- **Data Transparency:** As part of the SFMTA's commitment to transparency, it has the most comprehensive publicly available data of the peer cities. The SFMTA's published [shared mobility dashboards](#) include an extensive amount of information, including trip origins and destinations, complaints, citations, and associated heat maps.
- **Sidewalk Riding:** The SFMTA is the only peer city in the study that issues financial penalties to scooter share permittees for improper riding, including riding on the sidewalk, double riding and riding the wrong direction on the street.

Consultant Recommendations

- 1. Maintain a Permit-Based System:** Given San Francisco's mature regulatory framework for scooter share and the current economic landscape for micromobility providers, transitioning to an RFP system offers unclear benefits. A permit-based approach is recommended, particularly since most peer cities also follow this system. San Francisco could consider two-year permits or streamlined renewal processes for companies that meet certain performance metrics.
- 2. Continue Recent Changes to Financial Penalties:** The SFMTA has implemented an extensive enforcement program to address public safety concerns raised by the public and policymakers. San Francisco has historically levied higher financial penalties on permitted companies compared to peer cities. Recent adjustments, such as the Safe Micromobility Parking Incentive Policy, offer an innovative approach, retaining penalties as a regulatory tool while incentivizing companies to promptly address improperly parked devices. As a result of this innovative program, the average time that a scooter share permittee responds to a notification from the SFMTA to move a device has decreased from over six and a half hours to 46 minutes.
- 3. Increase Micromobility Competition:** Feedback from the scooter user survey highlighted affordability concerns. With only two permittees currently, San Francisco has fewer providers than peer cities. Introducing an additional permittee might drive competition, potentially leading to better pricing and increased access for users.
- 4. Retain Innovative Permit Distribution Requirements:** San Francisco's unique distribution model, ensuring scooters are placed within a ¼ mile of designated neighborhoods, promotes equitable scooter access. It mitigates challenges seen in peer cities, where scooters are often positioned at the edges of equity priority communities, serving primarily affluent areas.
- 5. Further Investments in Bicycle Infrastructure to Avoid Sidewalk Riding:** While outreach and technology to discourage sidewalk riding are crucial, another critical solution, as noted by many peer cities, is enhanced bicycle infrastructure. The data reveals that

sidewalk riding incidents are less frequent on streets equipped with designated bicycle facilities, with most sidewalk riding violations occurring on Class III infrastructure streets, where there is no dedicated bike lane and scooters and bicycles ride in mixed automobile traffic.

6. Strengthen Certain Reporting Requirements, While Streamlining Others: While the SFMTA requires comprehensive data from permitted companies, company provided data, in earlier data reporting standards, were often incomplete or inconsistent. The SFMTA recently updated the reporting requirements in the appendices of the permit terms and conditions, taking into consideration specific recommendations from Fehr & Peers. In addition, the SFMTA is transitioning to the updated Mobility Data Specification (MDS) 2.0 which will expand the information that is provided to the SFMTA through a direct data feed, such as adaptive scooter metrics. By transitioning to MDS 2.0 data reporting efficiency will further improve and the administrative burden of analysis will be reduced.

Next Steps

Internal Staff Review: The SFMTA will conduct an internal staff review of the consultant findings and recommendations during fall 2023. The goals of the review include:

- Convene a cross-divisional team to thoroughly discuss, review and consider key findings and recommendations
- Develop staff recommendations for programmatic changes based on staff's technical expertise and the consultant recommendations

Key Stakeholder Engagement: The SFMTA staff will engage with key community stakeholders and solicit input on staff recommendations during late fall 2023/early winter 2024. The goals of the key stakeholder engagement include:

- Ensure a diverse group of stakeholders have an opportunity to hear from staff directly about proposed changes to the scooter share program
- Solicit input from key stakeholders
- Consider key stakeholder feedback when developing final recommendations for the SFMTA Board's consideration

SFMTA Board Approvals: Request SFMTA Board approval of Transportation Code amendments, as needed, based on outcomes of internal staff review and key stakeholder interviews, winter 2024.

Release New Permit Program Applications: Release new permit applications to public in late winter/ early spring 2024. This will allow time to review and score applications, test proposed devices and data integrations, and allow time for selected applicants to set up.

Launch Updated Permit Program: July 1, 2024

Existing Safety Efforts

Sidewalk Detection Technology

In April 2023, the [SFMTA Board approved amendments to the Transportation Code](#) that require that all devices deployed in the scooter share program must have sidewalk detection technology by September 2023 and provide a monthly sidewalk riding report to the SFMTA starting in October 2023.

Both scooter share companies (Lime and Spin) have attested that 100% of their respective fleets are equipped with sidewalk detection technology, and the SFMTA has tested devices to ensure they conform with the requirements.

The sidewalk detection reports will help the SFMTA deepen our understanding of where sidewalk riding continues to occur and will allow us to better enforce and design additional safety interventions. Additionally, the SFMTA is currently developing an [Active Communities Plan \(ACP\)](#), a new blueprint for active mobility in San Francisco. The ACP encompasses all devices that can legally use the active transportation network, including powered scooters. Safety for users of the active transportation network is a primary goal, and the SFMTA will incorporate scooter sidewalk riding data into the ACP development process. The SFMTA expects that increased availability of safe active transportation routes will result in fewer instances of scooter sidewalk riding.

Embarcadero and Waterfront No Parking Zones

In response to the high level of complaints in the area, the SFMTA established trial no parking zones along The Embarcadero and Jefferson Street beginning in November 2022. Since that time, staff has worked with the Port to gradually allow scooter parking at designated areas.

311 Improvements

The SFMTA has worked with 311 to provide additional functionality for members of the public to report complaints through the 311 system. Complainants can now report improper parking more easily through the 311 app.

Ongoing Audits

Enforcement staff conducts audit of device marking requirements (NO SIDEWALK RIDING signage) and audits of sidewalk detection technology.

Scooter Safety Campaign

Due to the high number of personal scooter riders operating unsafely, the SFMTA launched a safety campaign in spring 2023 to encourage safe riding. The campaign focused on three critical safety messages:

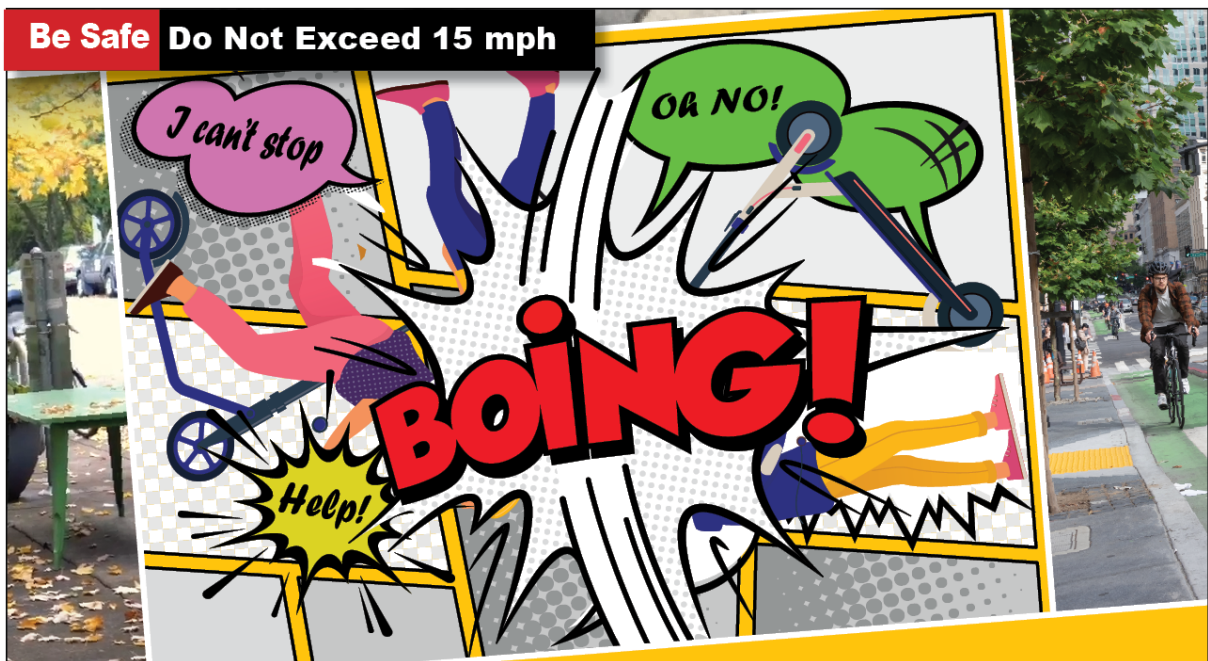
1. Sidewalk riding is illegal

2. Double riding is illegal
3. Powered scooters may not exceed 15 mph

The safety campaign included a [blog post](#), posters on Muni vehicles and social media messages.



SFMTA staff is working on phase II of the scooter safety campaign, which will continue the safe riding messaging through short videos.



SFMTA staff is also working on establishing in-person education classes for people who are interested in riding an electric scooter, so they can ride safely.