

Micromobility - Usage and Attitudes



Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council



Use of and Attitudes towards
Micromobility Options in Dublin

Executive Report

Report Date: 19/05/2022

Survey Fieldwork: April 2022

Report by:



Delve Research
Survey Research & Analysis

www.delve-research.com

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- Online survey, 19th -29th April 2022
- 948 respondents from the "Your Dublin, Your Voice" opinion panel
- 21% response rate
- Global margin of error +/- 3.2%
- Median completion time 10.5 minutes
- Robust panel in existence since 2010, recruitment through various channels



48%

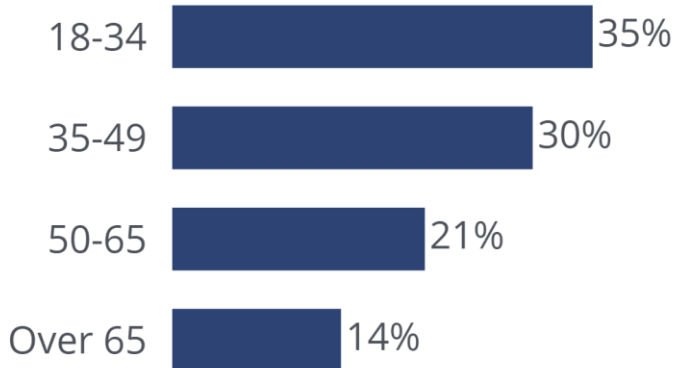


52%

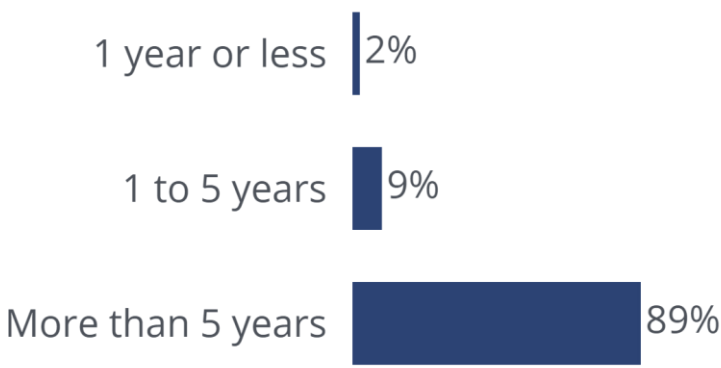


25% with dependent children in household

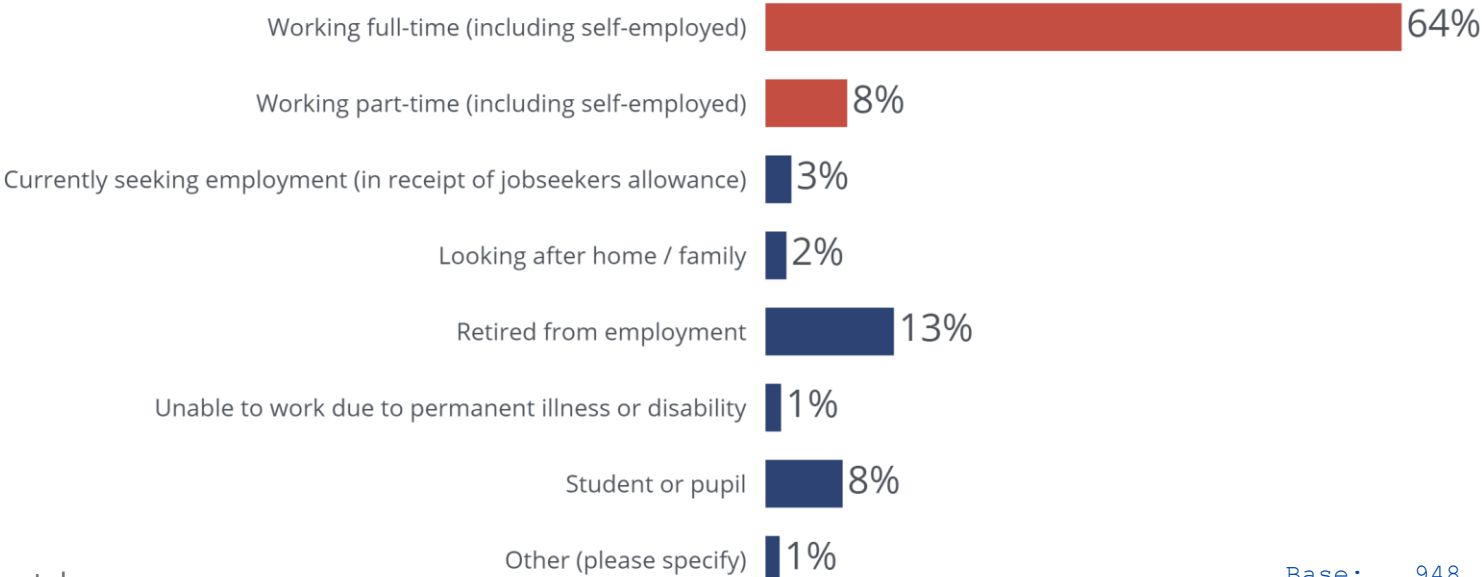
Age Group



Time Living in Dublin



Employment Status

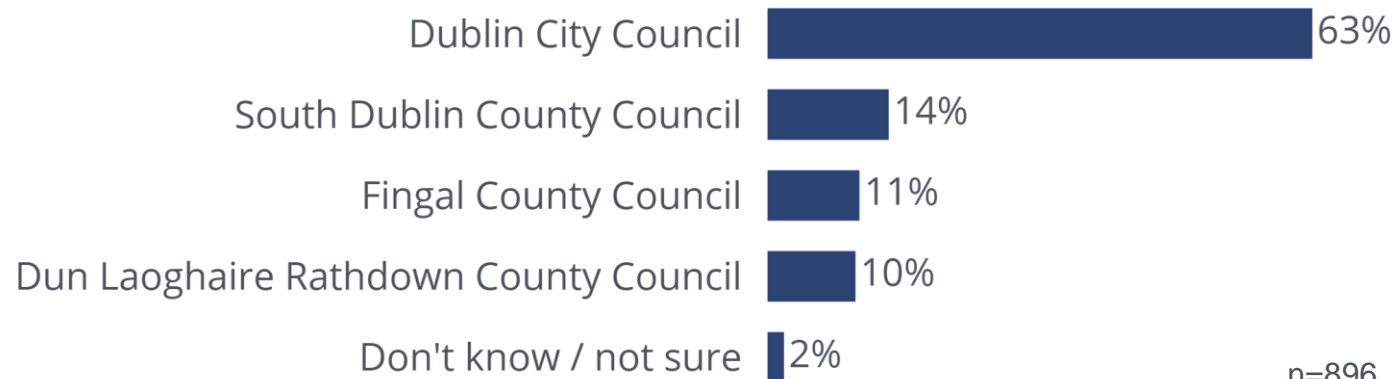


Note: figures throughout this report are weighted to accurately reflect the age and gender distribution of the population

28 nationalities represented on this survey, 90% Irish



Local Authority

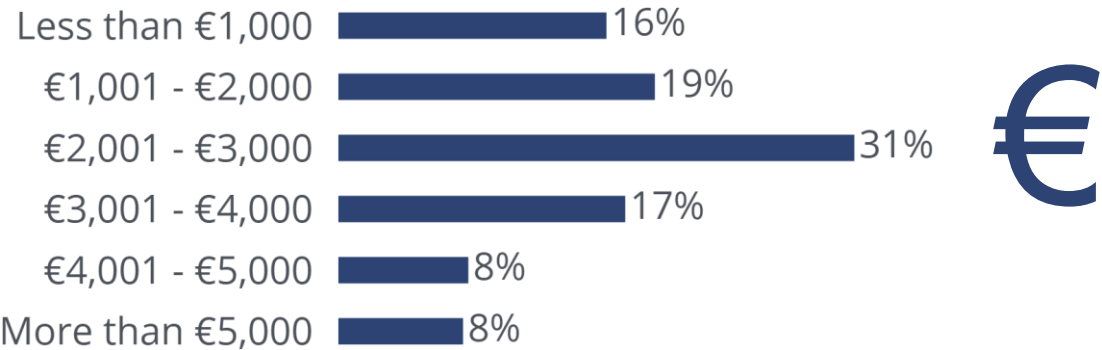


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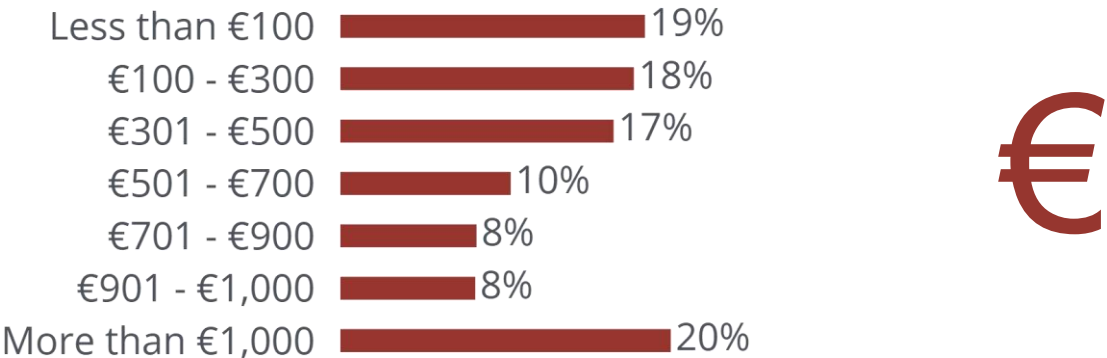
Current Area of Residence

	%
County Dublin	10%
Dublin 1	3%
Dublin 2	3%
Dublin 3	5%
Dublin 4	4%
Dublin 5	4%
Dublin 6	4%
Dublin 6W	3%
Dublin 7	10%
Dublin 8	11%
Dublin 9	7%
Dublin 10	1%
Dublin 11	4%
Dublin 12	6%
Dublin 13	3%
Dublin 14	4%
Dublin 15	2%
Dublin 16	2%
Dublin 17	1%
Dublin 18	2%
Dublin 20	1%
Dublin 22	1%
Dublin 24	2%
Outside County Dublin	6%

Monthly Income After Taxes, Before Bills



Monthly Disposable Income After Bills Are Paid



Across all elements of the survey results some very consistent demographic variances are noted.

- The following demographic groups demonstrate consistently higher levels of favourability towards and / or use of micromobility options:
 - **Males** (more favourable towards / higher usage than females)
 - **Under 50s** (more favourable towards / higher usage than those aged 50 or over)
 - Those with **higher educational achievement** (more favourable towards / higher usage than those with lower educational achievement)
 - Those **in employment** (more favourable towards / higher usage than those not in employment – this includes those looking after the home and retired)
 - Those with **no mobility challenges** (more favourable towards / higher usage than those with mobility challenges)

Geographically, respondents living in the **Dublin City Council local authority area** tend to be more favourable towards and are more likely to have used various micromobility options. For certain options favourability is particularly strong in the **Central** and **South Central** Areas.

Other indicators of favourability towards and / or use of micromobility options are **presence of children** in the household and **higher disposable income**.

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Sustainable Transport / Active Travel

- **95%** of respondents support **sustainable transport**
- **93%** support **active travel**
- Support for both concepts is higher among **younger** respondents

E-Scooters

- **4%** of respondents use e-scooters, and a further **36%** would like to use an e-scooter
- **55%** feel that a shared e-scooter scheme for Dublin would have a **positive impact**
- **Environmental considerations** were the most commonly selected positive aspect of e-scooters, followed by **convenience** and **car traffic reduction**
- **73%** of respondents identified "**Danger to other road users**" as a negative aspect of e-scooters
- **59%** indicated a preference for **designated parking** for e-scooters. This preference was particularly strong among those who felt that an e-scooter scheme would have a negative impact
- **41%** indicated that they would be somewhat or very **likely to use a shared e-scooter scheme** in Dublin
- **Convenience / ease of use** was the most common reason cited for being very likely to use a shared e-scooter scheme.
- **Safety concerns** were the main reasons given by people indicating they would be unlikely to use a shared e-scooter scheme.

E-Cargo Bikes

- **1%** of respondents use an e-cargo bike, and a further **36%** indicated that they would like to use an e-cargo bike
- The most common reasons for using an e-cargo bike were doing a “**big**” **supermarket shop and transporting children or pets**
- **Lack of storage, safety concerns** and **expense** were the most common reasons cited for not using an e-cargo bike
- **68%** feel that a shared e-cargo bike scheme for Dublin would have a **positive impact**
- Those living in the Dublin City Council area were more likely to see a positive impact of e-cargo bikes, and this view was stronger again in the South Central Area
- **33%** indicated that they would be **likely to use a shared e-cargo bike scheme** if introduced in Dublin
- As an alternative **way of transporting shopping / other goods** was the most common reason cited for being very likely to use a shared e-cargo bike scheme.
- The most common reason for being unlikely to use a shared e-cargo bike scheme in Dublin was that this was not of use to the respondent personally. Others expressed **safety concerns**, felt that they were **more suitable for younger people**, or indicated that they **did not cycle**.

Car Clubs

- **83%** feel that car clubs have an overall **positive impact**
- **21%** have used a car club service in Dublin. This was highest in the Dublin City Council area (27%) and higher still in the Central Area (31%)
- **57%** of those using a car club service in Dublin have done so to **shop for big items**, 43% had used a car club service to **move house** and 34% had used a car club service for **a day of recreation**
- Among those who have not used a car club service, **49%** feel that their private car is more convenient, and 34% simply do not drive
- Among those who have used a car club service, **82%** found the experience **good or very good**. **Convenience / ease of use** was the most common reason cited for a positive experience with a car club.
- **58%** feel that there should be an increase in car club services in Dublin. This rises to 64% in the Dublin City Council area
- The main reasons cited for supporting an increase in car club services include a **reduction in congestion / volume of cars**, and car clubs providing a **good option for those who don't need a car full-time**
- The main reasons for opposing an increase in car club services include feeling that there are **too many cars on the road as it is**, and a need to **focus on other forms of transport such as public transport**

Shared Mobility Hubs

- **62%** of respondents indicated that they would be **likely to use a Shared Mobility Hub** if introduced in their area. Those living the Central Area (70%) and South Central Areas (74%) are most likely to use a Shared Mobility Hub if introduced.
- Having **all the options in one place, convenience**, and **potentially giving up car ownership** were all common reasons for being very likely to use a Shared Mobility Hub in Dublin.
- The most common reason for being unlikely to use a Shared Mobility Hub was being **happy with their own transport or transport options**.
- **E-Bikes** and **Bikes** are the most popular options that respondents would use if a Shared Mobility Hub was introduced in their area.

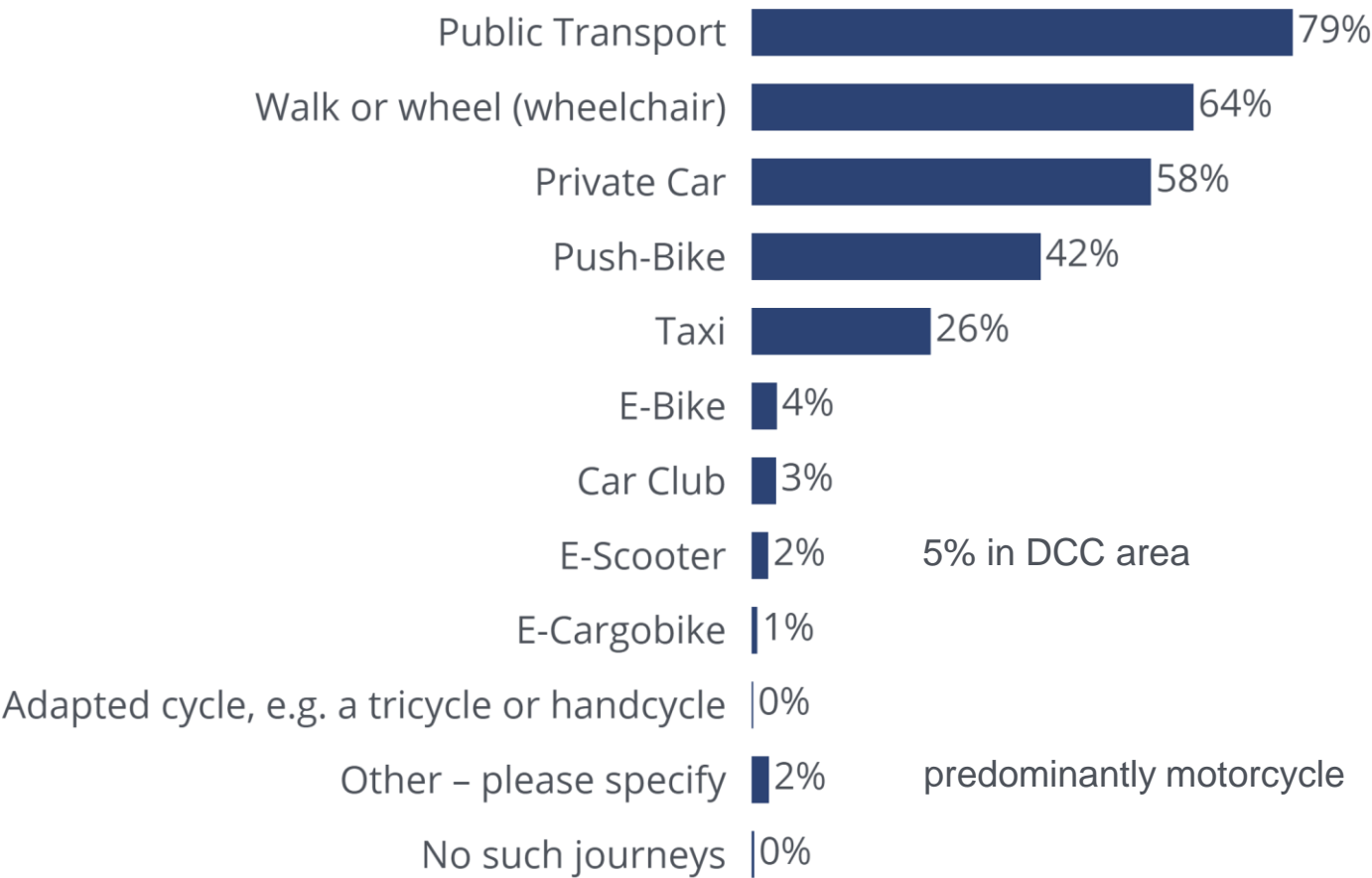
Demographic Variances

- Across all micro-mobility options, use of, likely use of, and experience of these options tended to be higher among:
 - Males
 - Younger respondents
 - Those in employment
 - Those with children
 - Those with higher educational achievement
 - Those with higher disposable income
 - Those with no mobility challenges

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Most people use multiple modes of transport. For typical journeys between 1km and 15km, which of the below options do you usually use? Please select as many options as apply.



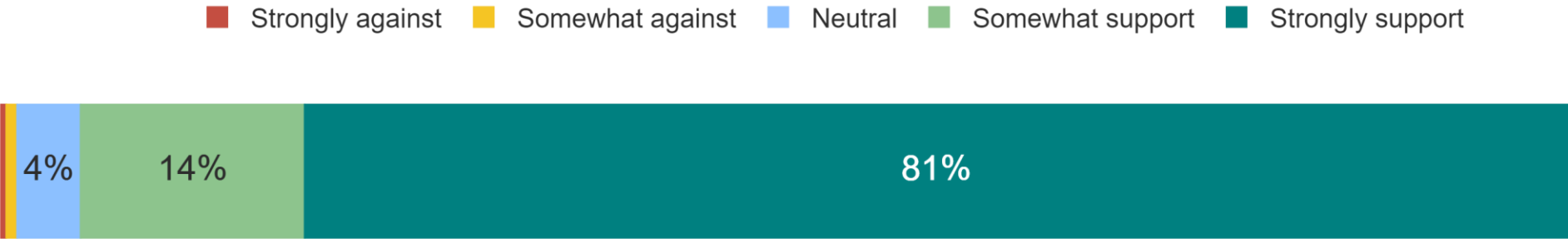
5% in DCC area

predominantly motorcycle

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Sustainable transport refers to types of transportation that are sustainable in terms of their social and environmental impacts. Overall, to what extent do you support sustainable transport?



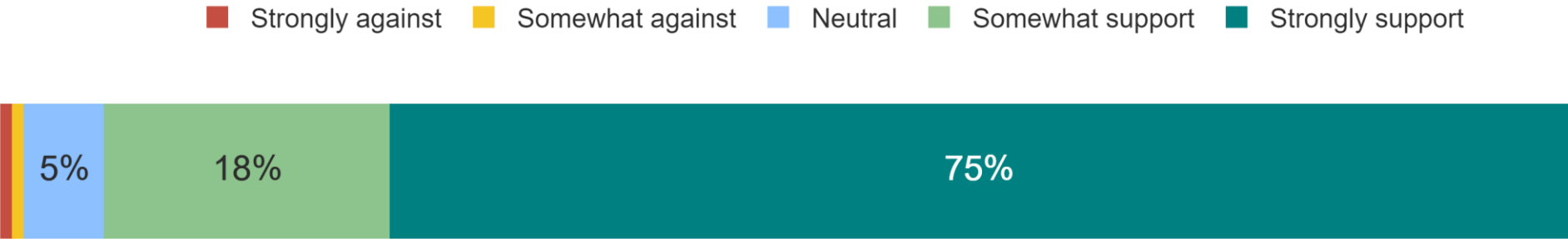
95% support sustainable transport

- Support for sustainable transport is higher among under 50s and is highest among 18-34 year-olds.
- Support for sustainable transport is higher among those with no mobility challenges.

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Active Travel is travelling with a purpose using your own energy. Generally this means walking (including all users of footpaths) or cycling as part of a purposeful journey. Overall, to what extent do you support active travel?



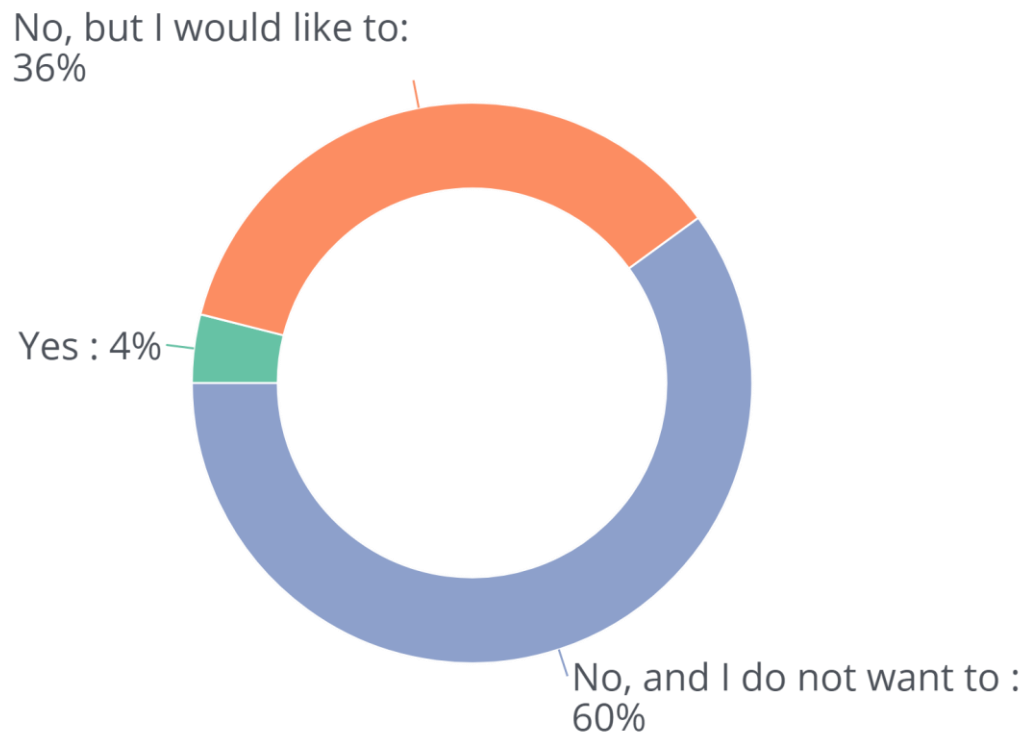
93% support active travel

- Support for active travel is highest among 18-34 year-olds.
- Support for active travel increases with education.
- Support for active travel is higher among those with no mobility challenges.

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Do you use an e-scooter?



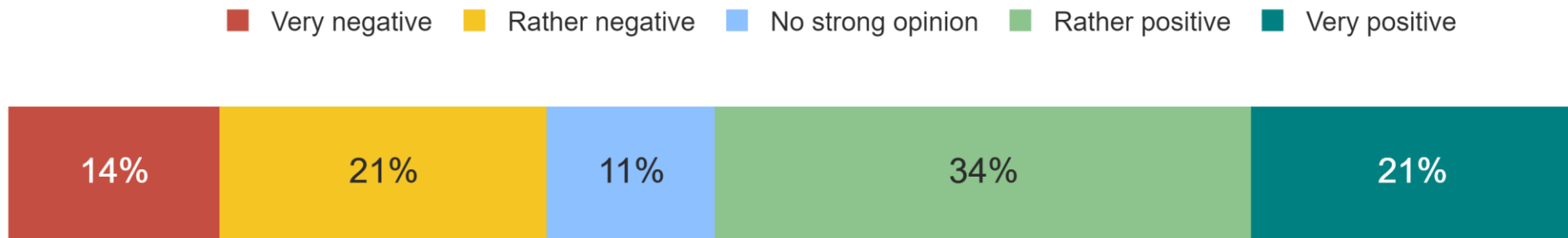
4% of respondents use an e-scooter

This is higher among males (**6%**) than among females (**2%**)

There were no e-scooter users over 65 in the sample

36% indicated that they would like to use an e-scooter

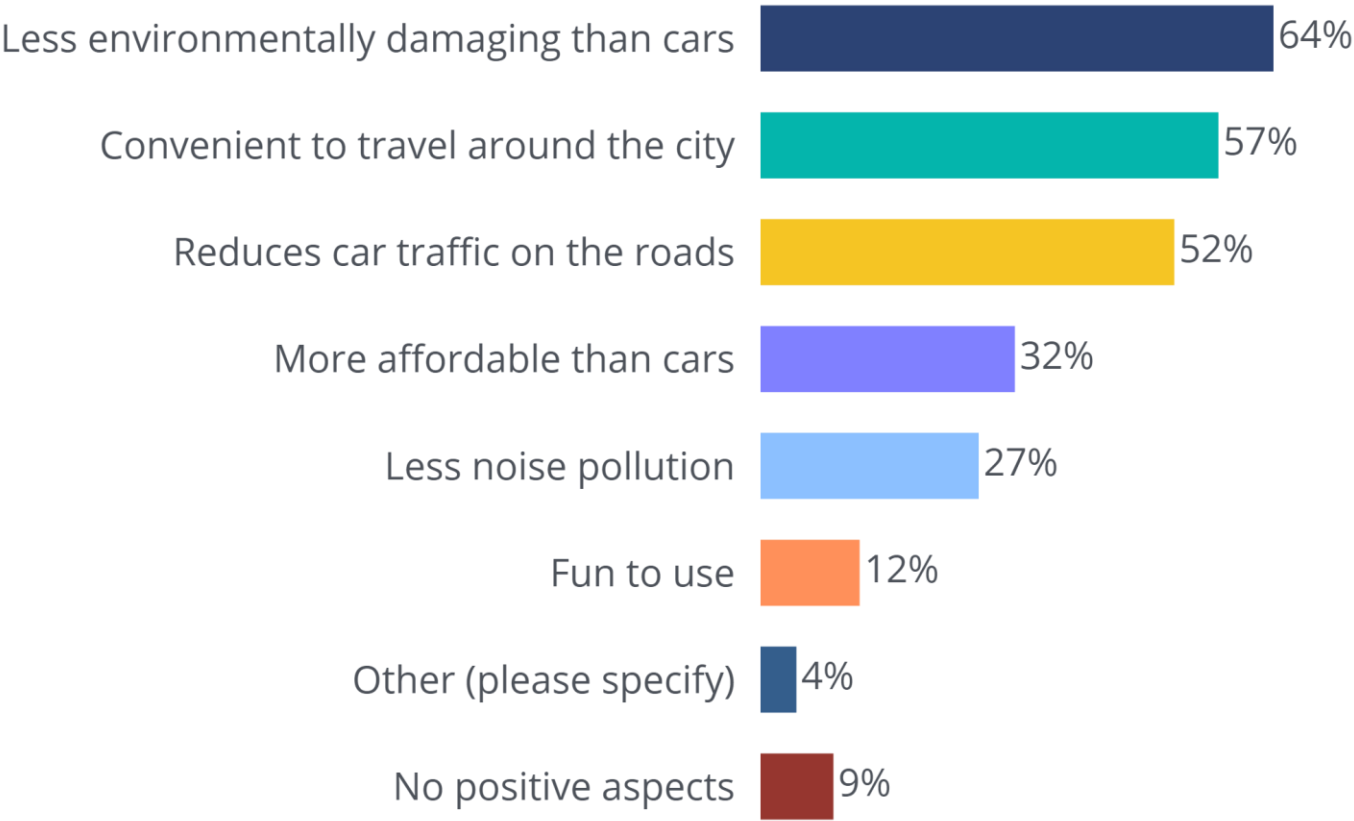
Overall, do you think a shared e-scooter scheme for Dublin would have a positive or negative impact?



55% feel that a shared e-scooter scheme for Dublin would have a positive impact

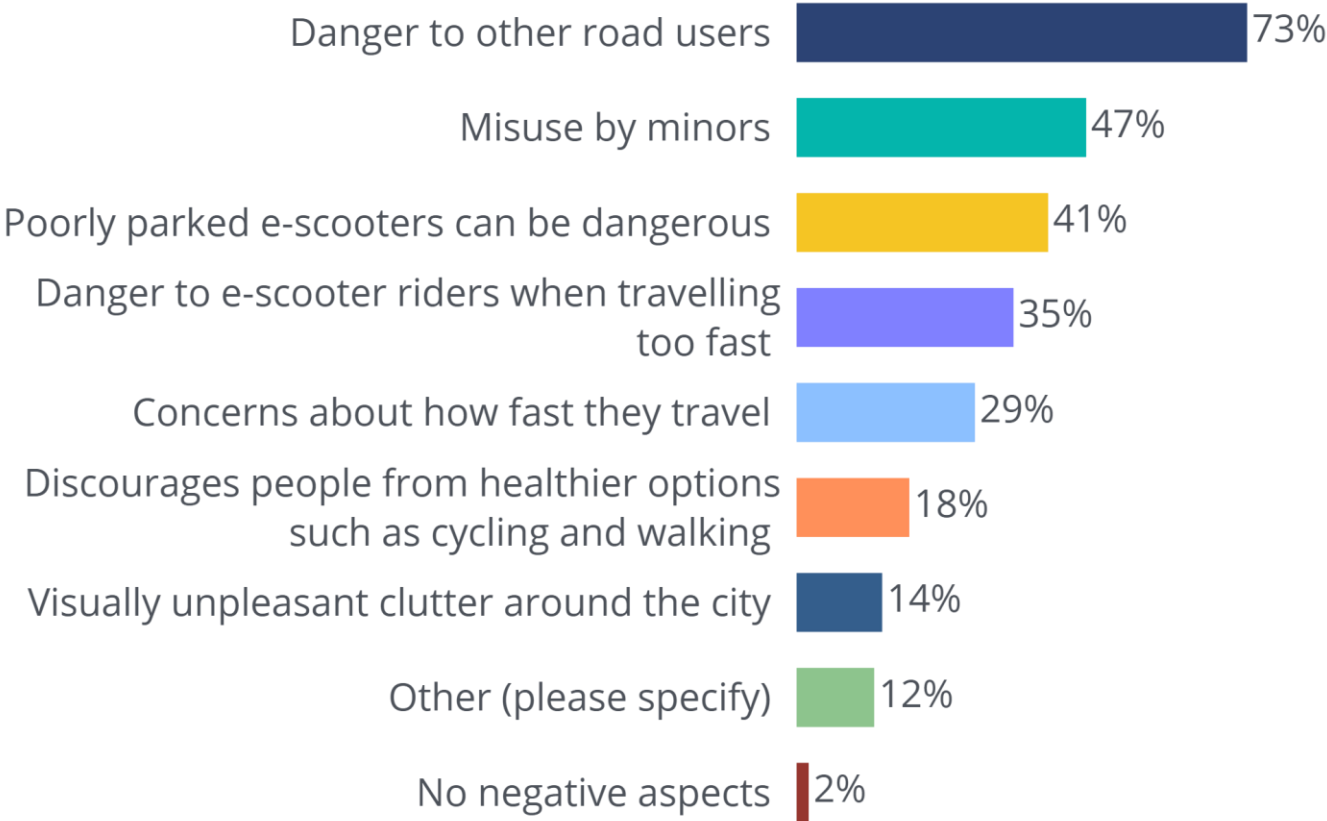
- Males are more likely to feel that a shared e-scooter scheme for Dublin would have a positive impact
- Those aged under 50 were more likely to see a positive impact of a shared e-scooter scheme.
- Those with higher educational achievement were more likely to see a positive impact as were those with no mobility challenges.

In your view, what are some positive aspects of e-scooters? Please select up to three from the following list,
% selecting



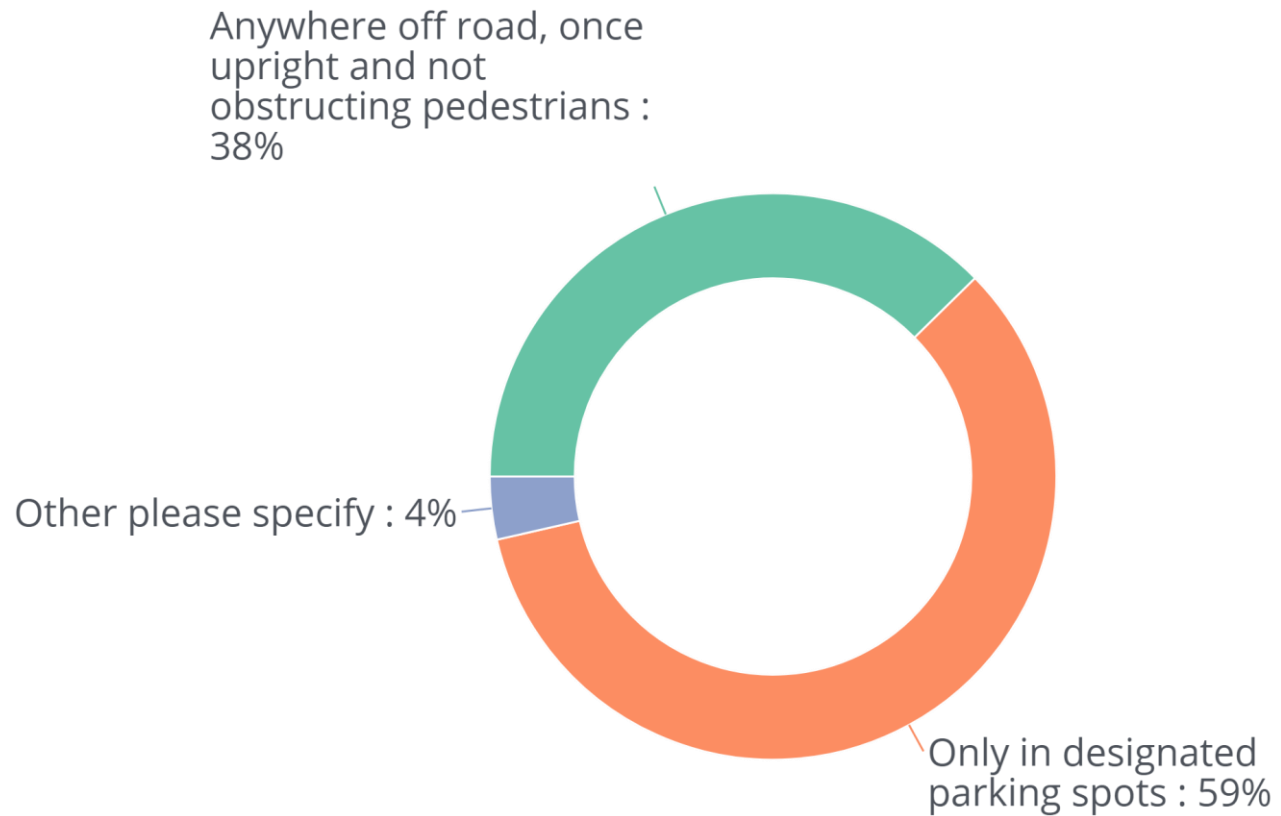
Environmental considerations were the most commonly selected positive aspect of e-scooters, followed by convenience and car traffic reduction.

In your view, what are some negative aspects of e-scooters? Please select up to three from the following list,
% selecting



73% of respondents identified "Danger to other road users" as a negative aspect of e-scooters.

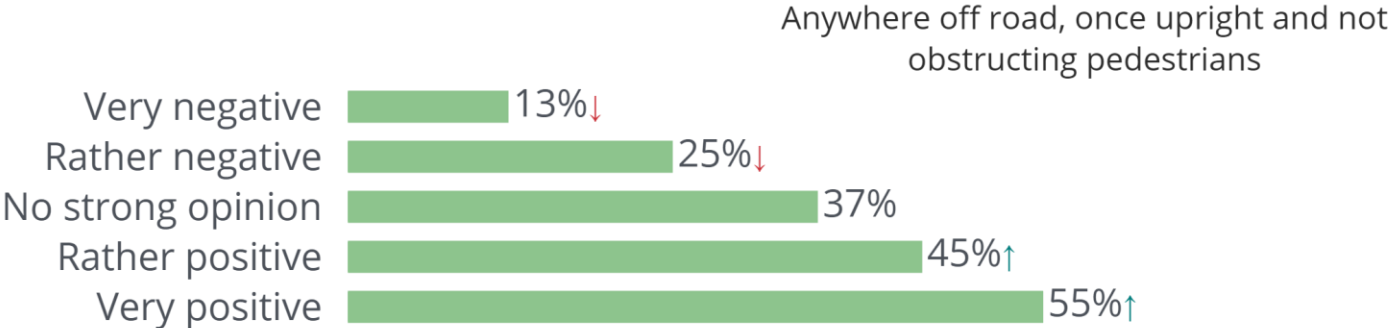
What type of parking should be allowed for an e-scooter scheme?



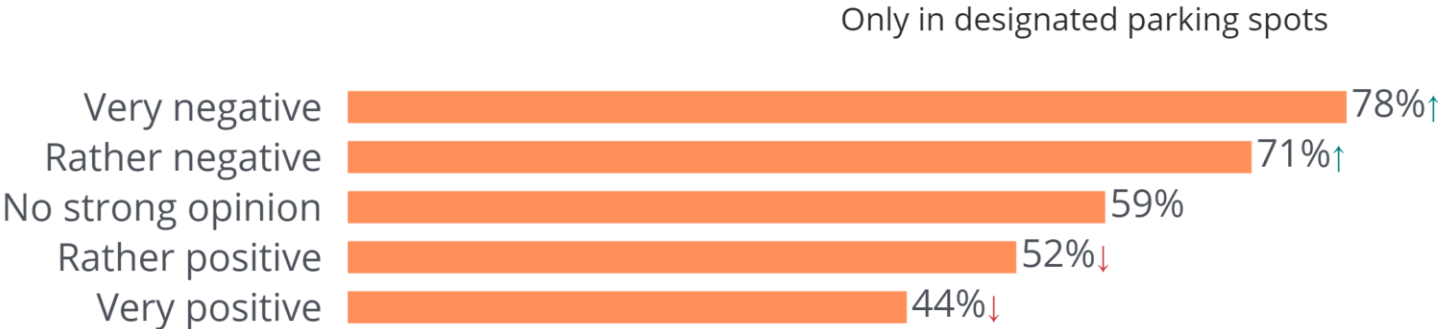
59% indicated a preference for designated parking for e-scooters

There was no significant variance across all demographics.

What type of parking should be allowed for an e-scooter scheme?
by overall sentiment towards e-scooter scheme

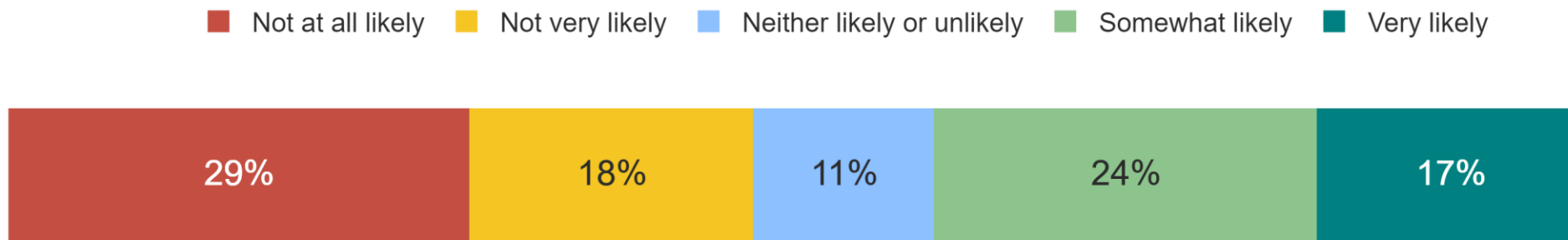


“Anywhere off road” is highest among those who feel that an e-scooter scheme would be positive.



"Designated parking spots" is highest among those who feel that an e-scooter scheme would be negative.

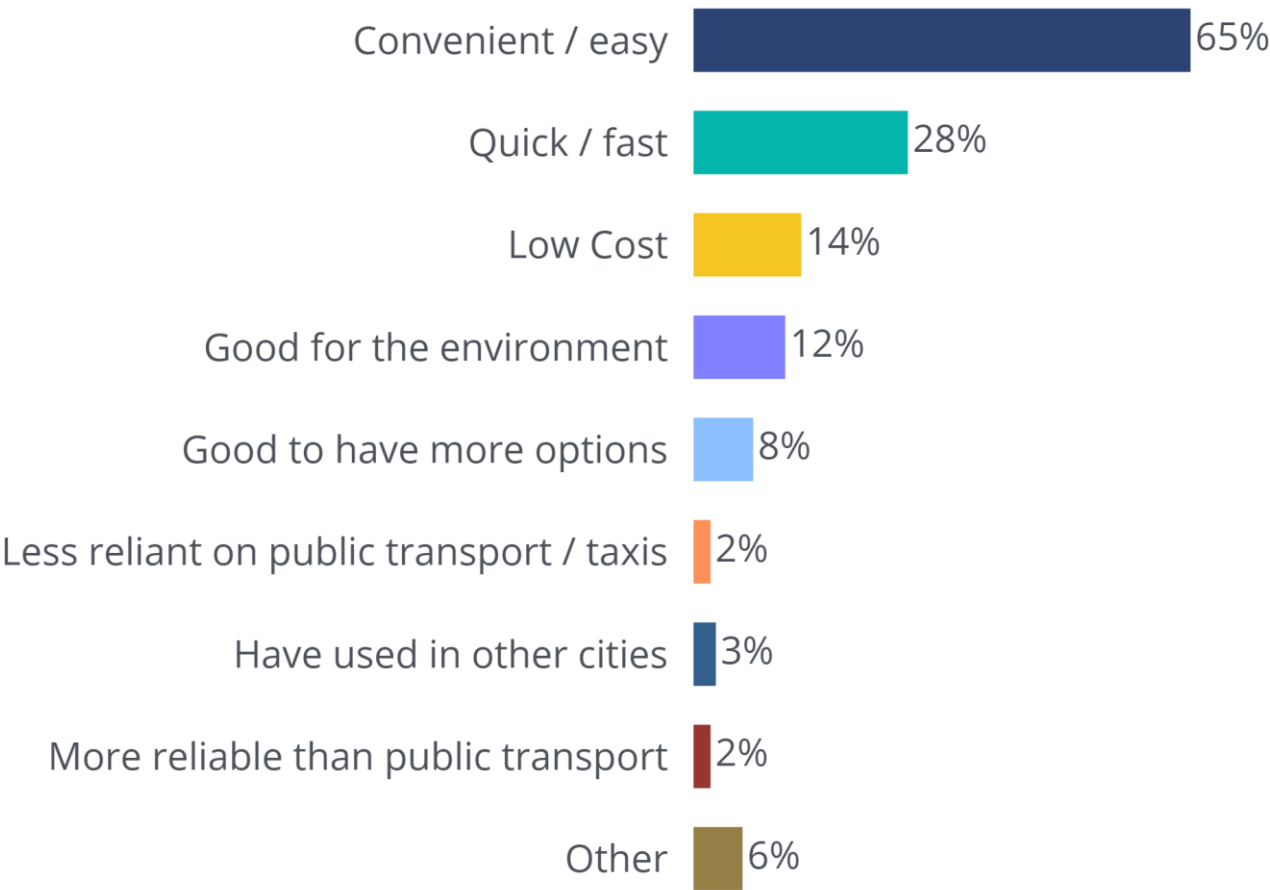
If a shared e-scooter scheme was introduced in Dublin, how likely would you be to use it?



41% indicated that they would be somewhat or very likely to use a shared e-scooter scheme if introduced in Dublin

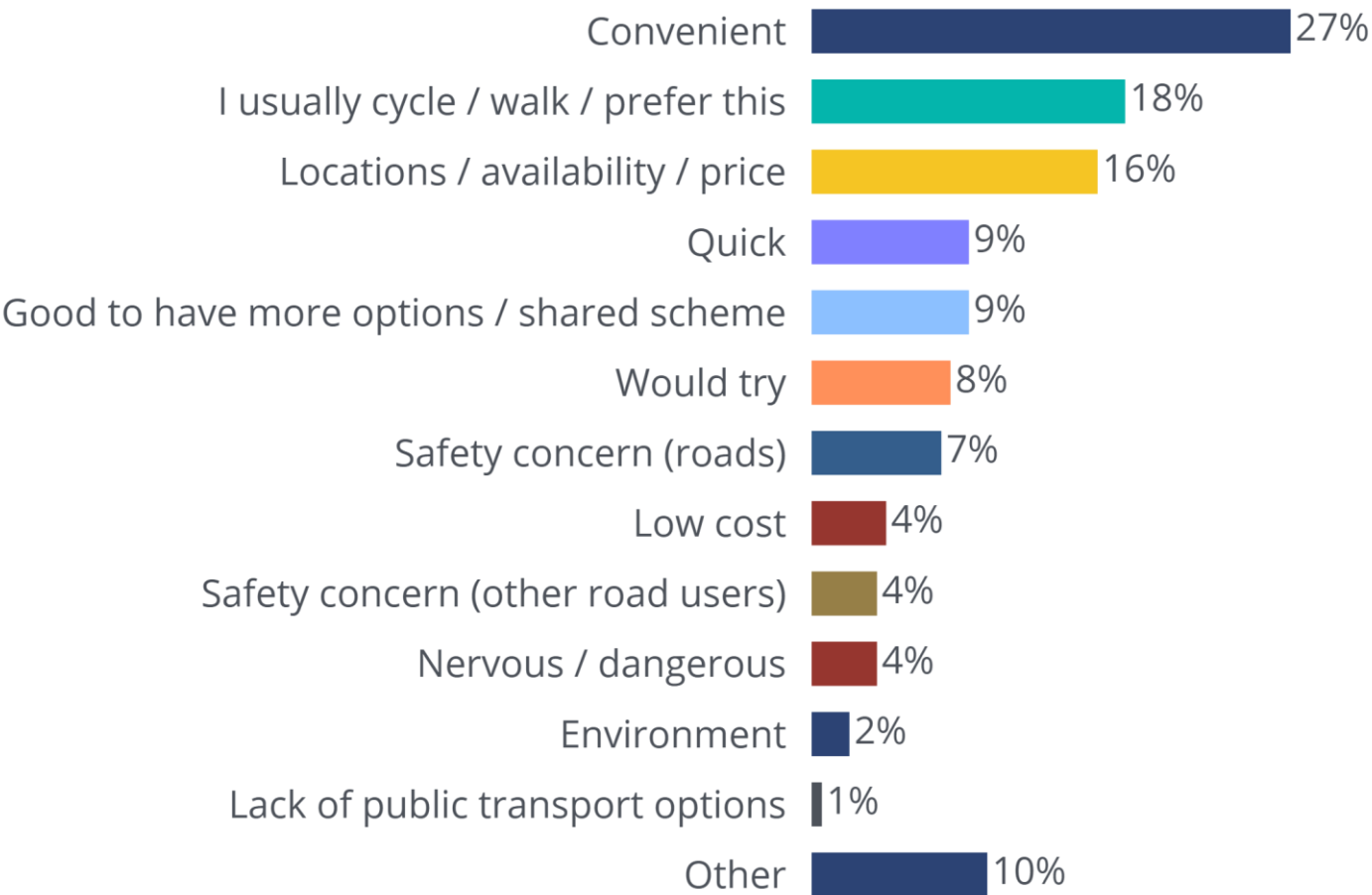
- Male respondents are more likely to use a shared e-scooter scheme.
- Those aged under 50 are more likely to use a shared e-scooter scheme.
- Interest in using a shared e-scooter scheme is highest in the South Central Area of Dublin City Council.
- Those in employment were more likely to use a shared e-scooter scheme as were those with no mobility challenges.

Reasons "Very likely" to use a shared e-scooter scheme in Dublin



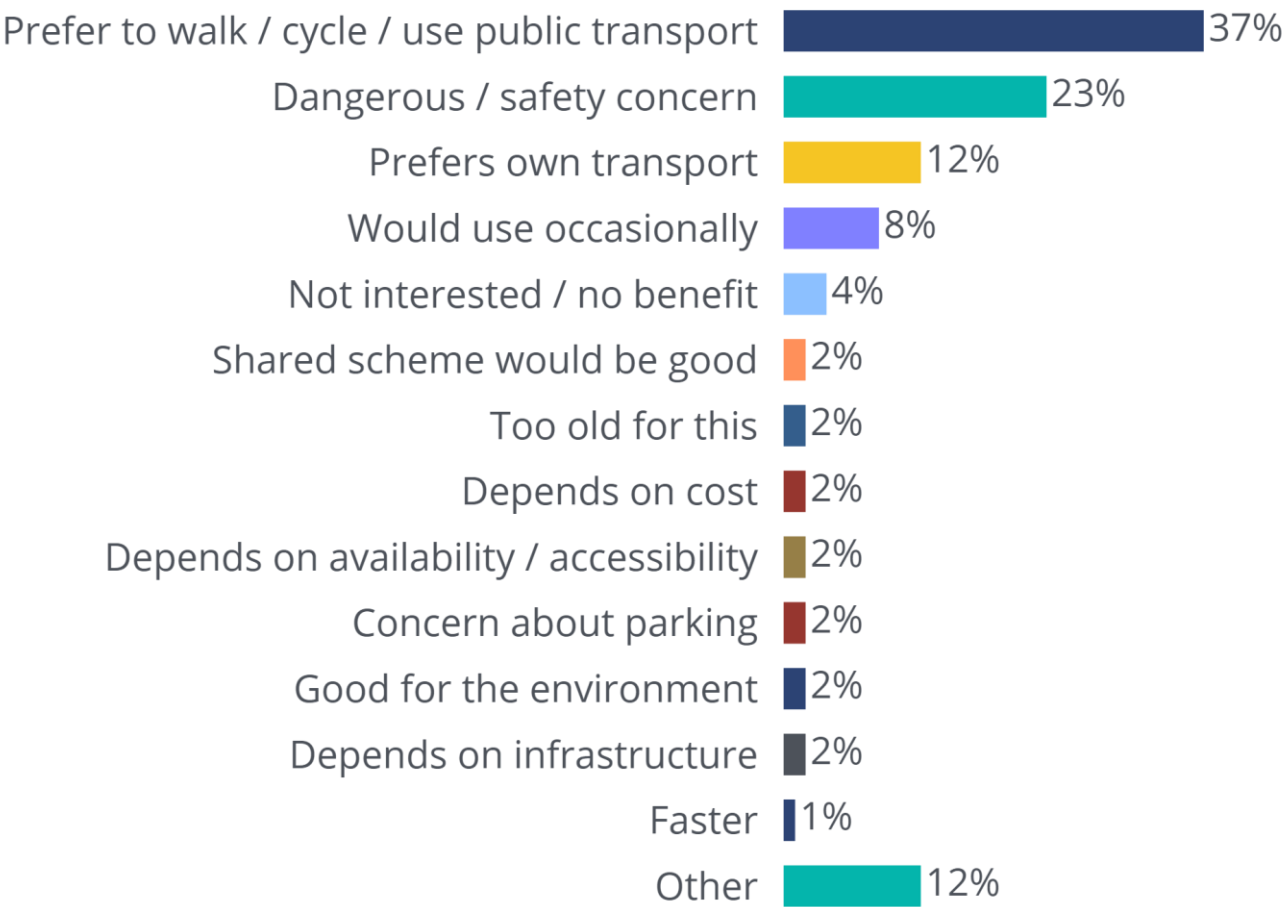
Convenience / ease of use was the most common reason cited for being very likely to use a shared e-scooter scheme.

Reasons "Somewhat likely" to use a shared e-scooter scheme in Dublin



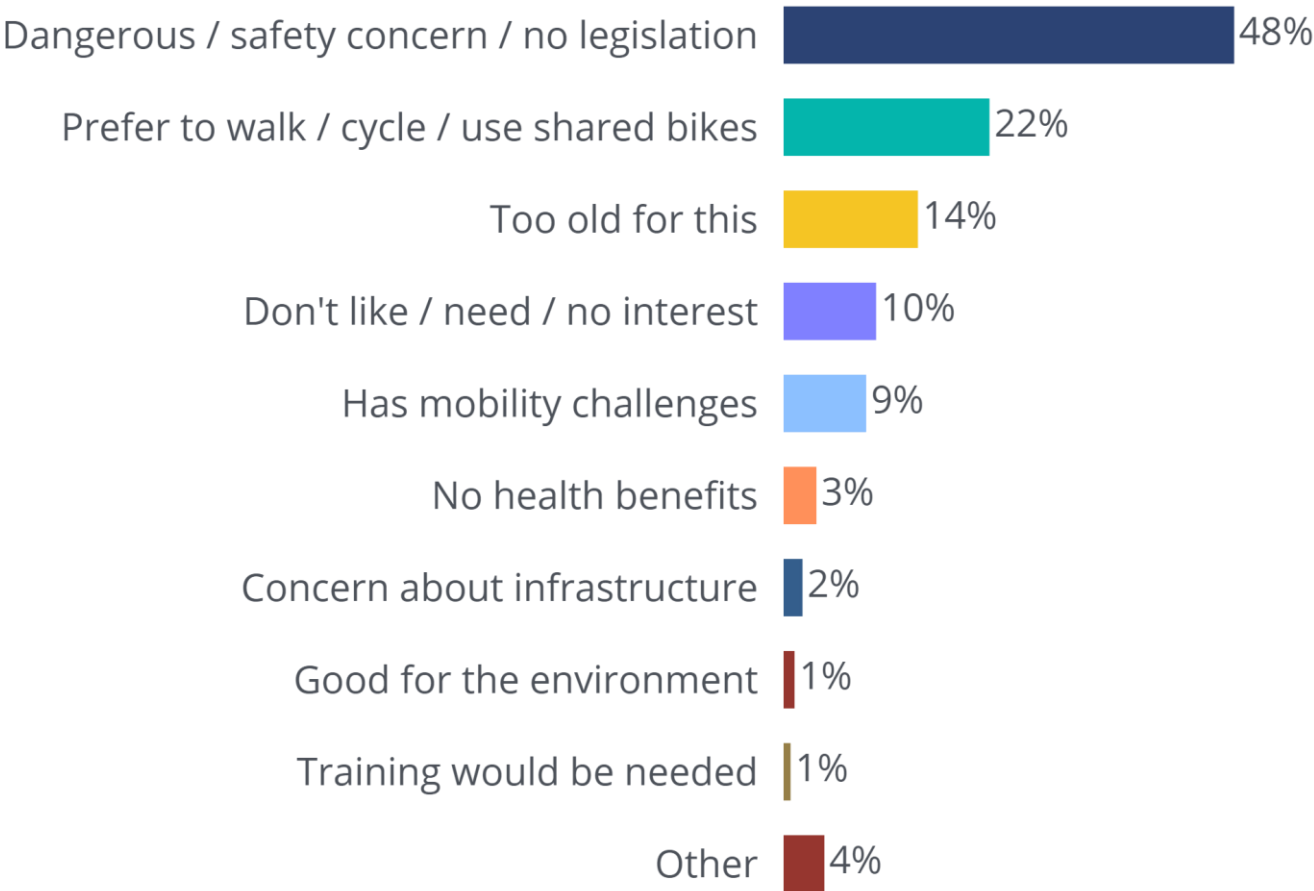
Convenience / ease of use was the most common reason cited for being somewhat likely to use a shared e-scooter scheme, but there were some concerns about safety.

Reasons "Neutral" about using a shared e-scooter scheme in Dublin



Preferring to walk / cycle or use public transport was the most common reason respondents indicated "neutral" likelihood of using a shared e-scooter scheme.

Reasons "Unlikely" to use a shared e-scooter scheme in Dublin

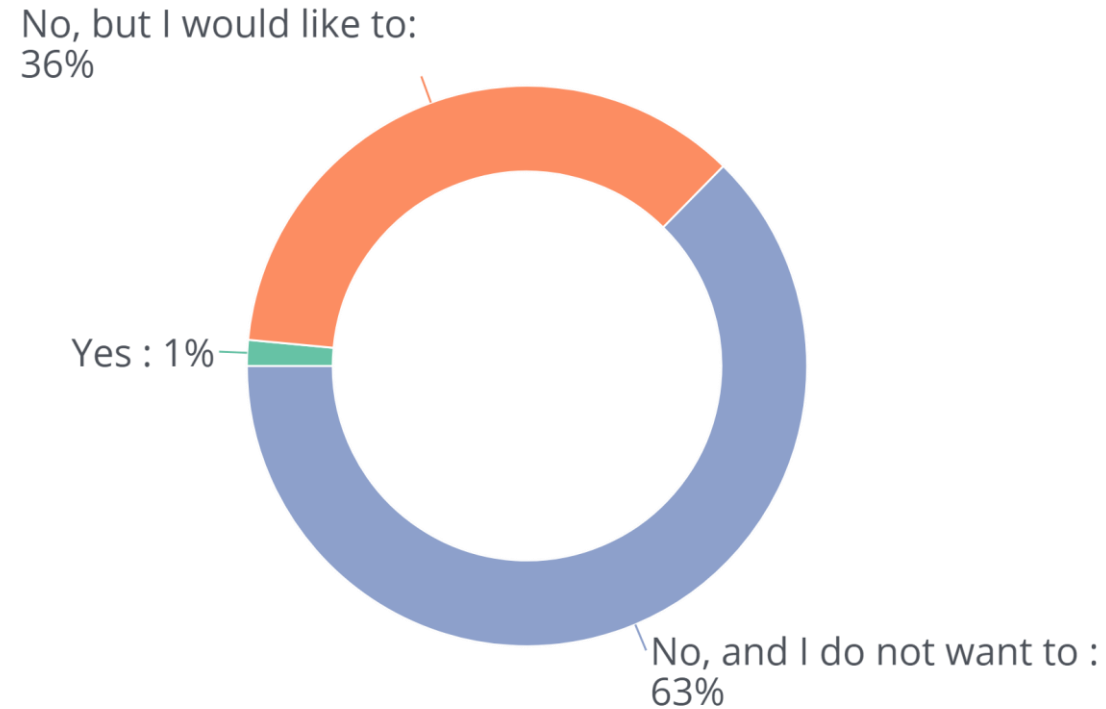


Safety concerns were the main reasons given by people indicating they would be unlikely to use a shared e-scooter scheme.

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Do you use an e-cargo bike?

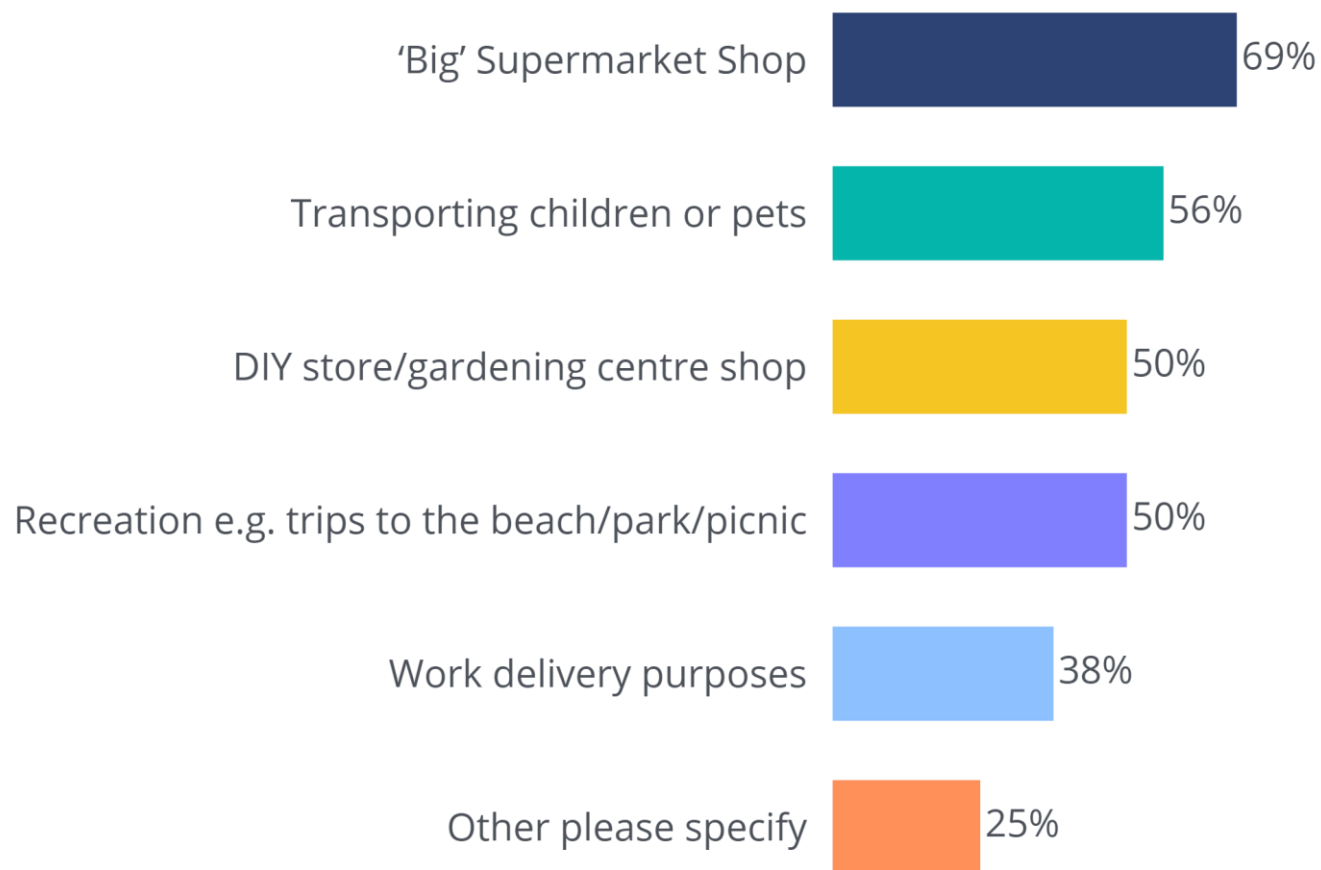


1% of respondents use an e-cargo bike
(17 respondents)

All but one of these was in employment

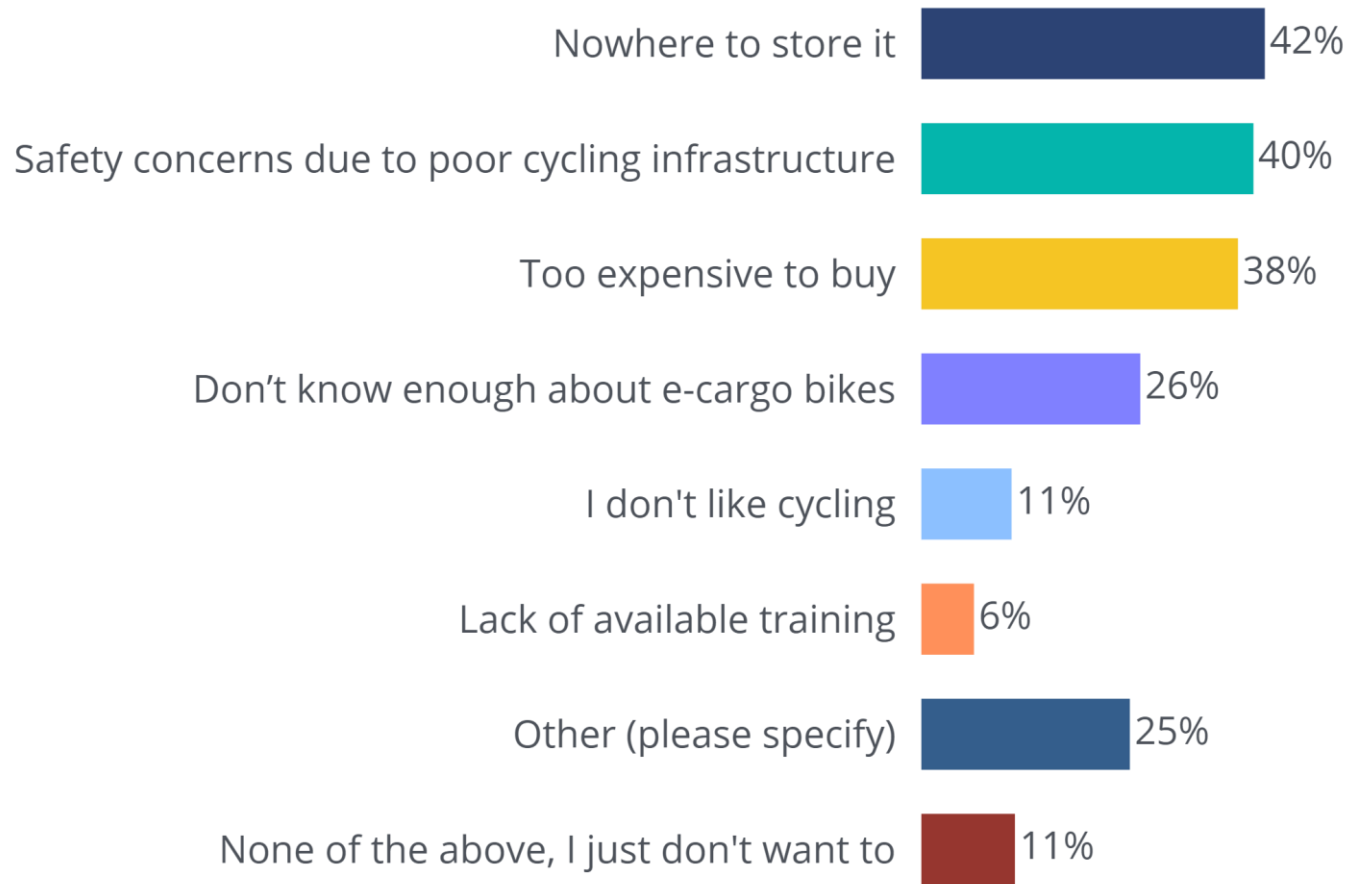
36% of respondents indicated that they would like to use an e-cargo bike

What types of journeys do you use the e-cargo bike for? Please select as many as apply.



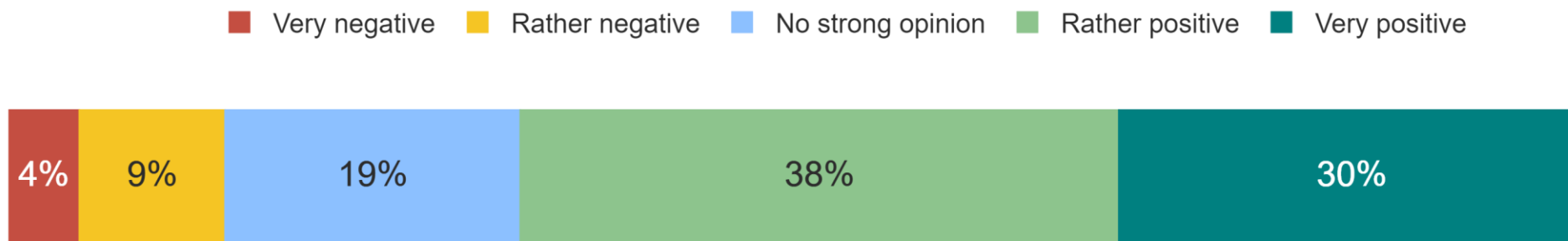
- I don't currently use
- I have an e-cargo-bike as a back-up for when my regular cargo-bike is in the bike-shop for repairs. I also loan it to others who might need it.
- I use mine for work but I'm not a delivery person
- recycling (glass / electronics), providing music at public events, mobile bar

What is stopping you from using an e-cargo bike? Please select as many as apply.



Lack of storage, safety concerns and expense were the most common reasons cited for not using an e-cargo bike

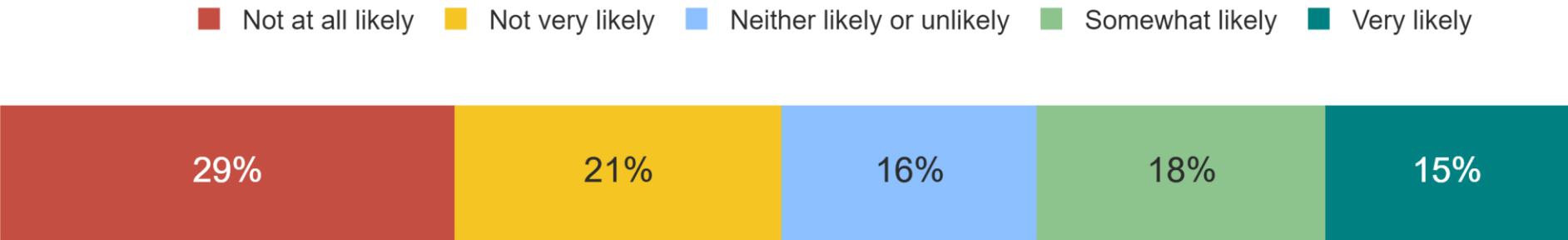
If a shared e-cargo bike scheme was introduced in Dublin, allowing the public to rent an e-cargo bike for short journeys around the City, do you think the scheme would have an overall positive or negative impact?



68% feel that a shared e-cargo bike scheme for Dublin would have a positive impact

- Under 50s are more likely to see a positive impact of a shared e-cargo bike scheme
- Those with no mobility challenges are more likely to see a positive impact of a shared e-cargo bike scheme
- Dublin City Council residents are more likely than others to see a positive impact. Within the DCC area this view was strongest in the South Central Area.

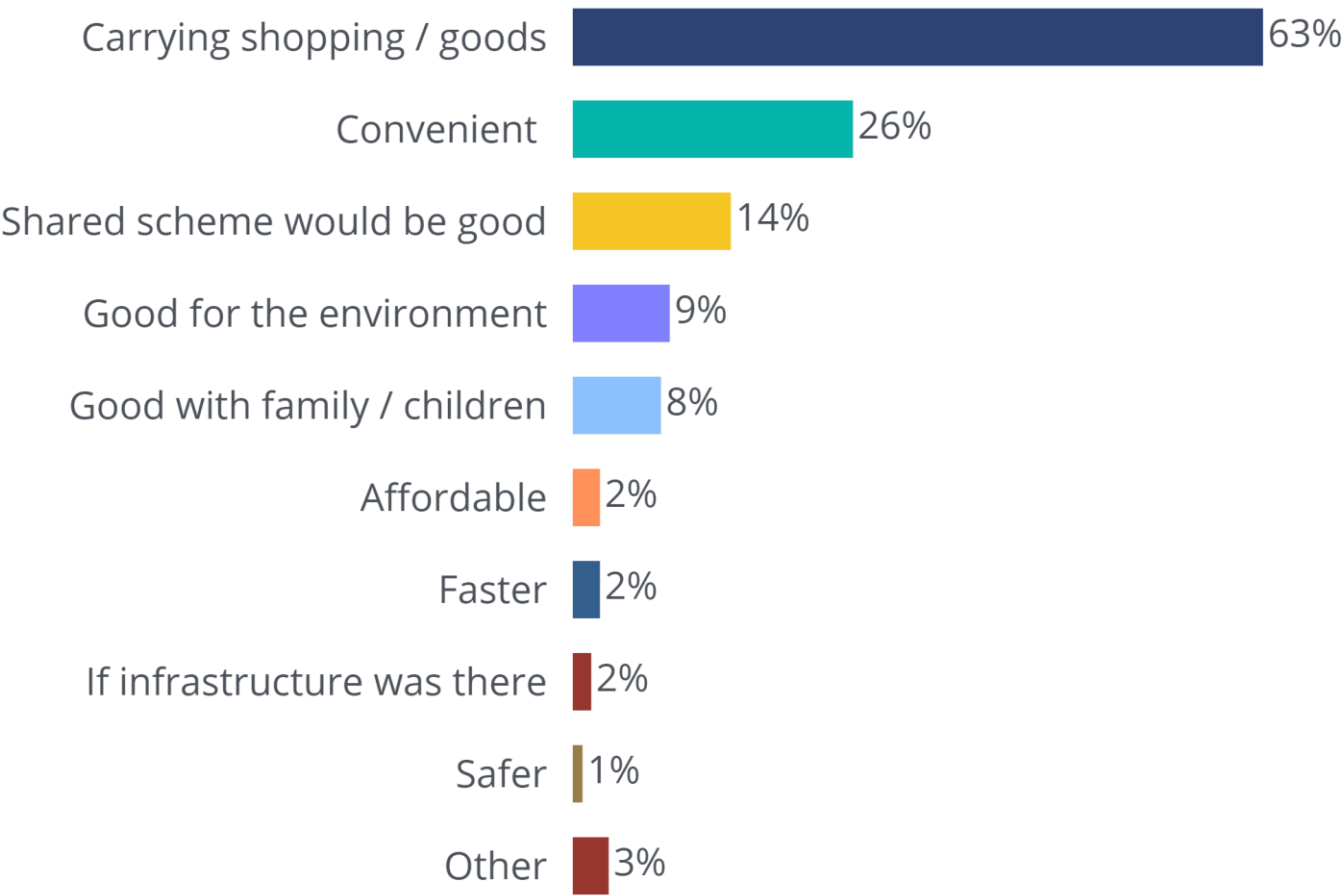
If a shared e-cargo bike scheme was introduced in Dublin, how likely would you be to use it?



33% indicated that they would be somewhat or very likely to use a shared e-cargo bike scheme if introduced in Dublin

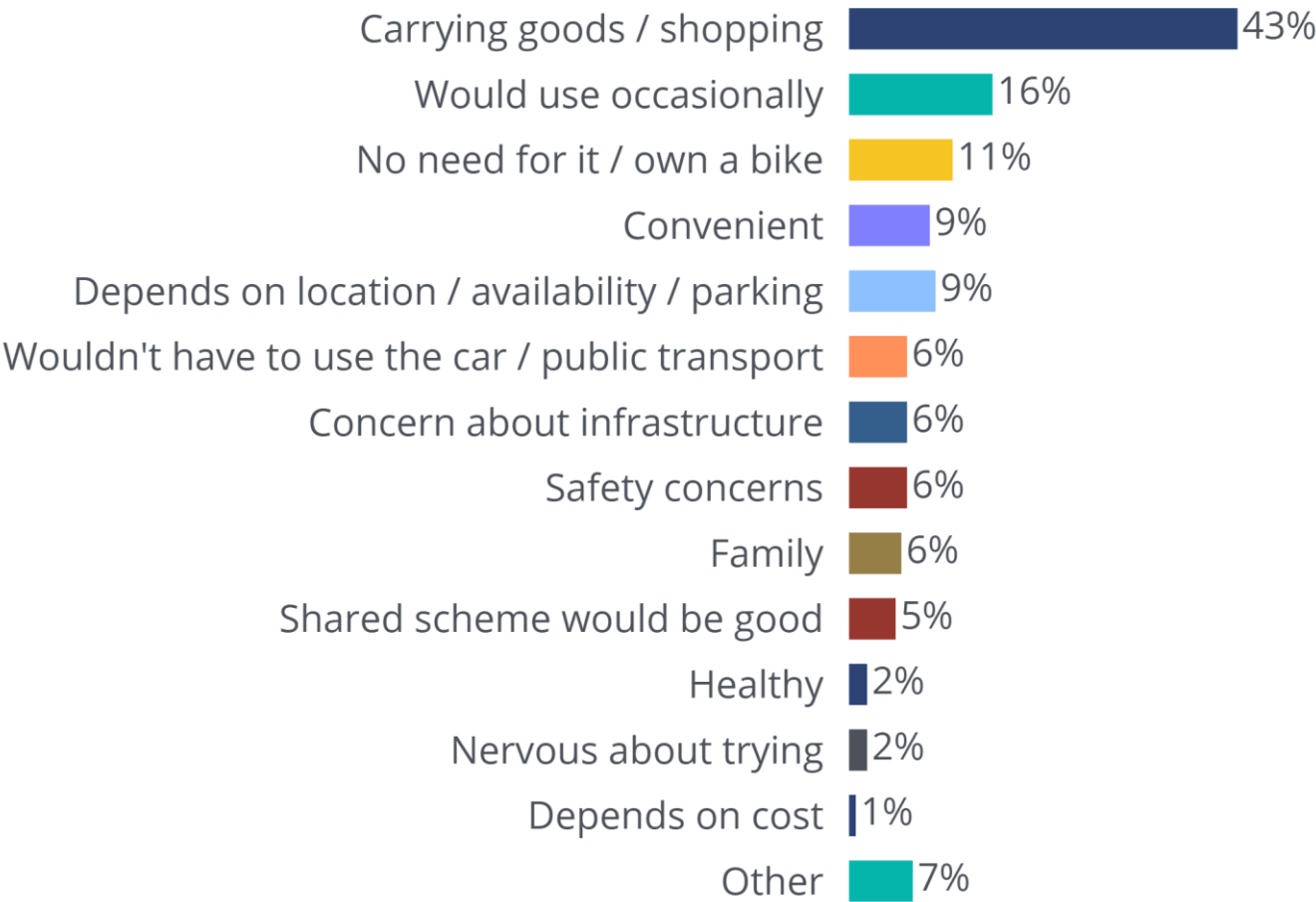
- Male respondents are more likely to use a shared e-cargo bike scheme
- Younger respondents are more likely to use a shared e-cargo bike scheme
- Dublin City Council based respondents are more likely to use a shared e-cargo bike scheme, and this was highest in the South Central area
- Respondents with children in the household are more likely to use a shared e-cargo bike scheme

Reasons "Very likely" to use a shared e-cargo bike scheme in Dublin



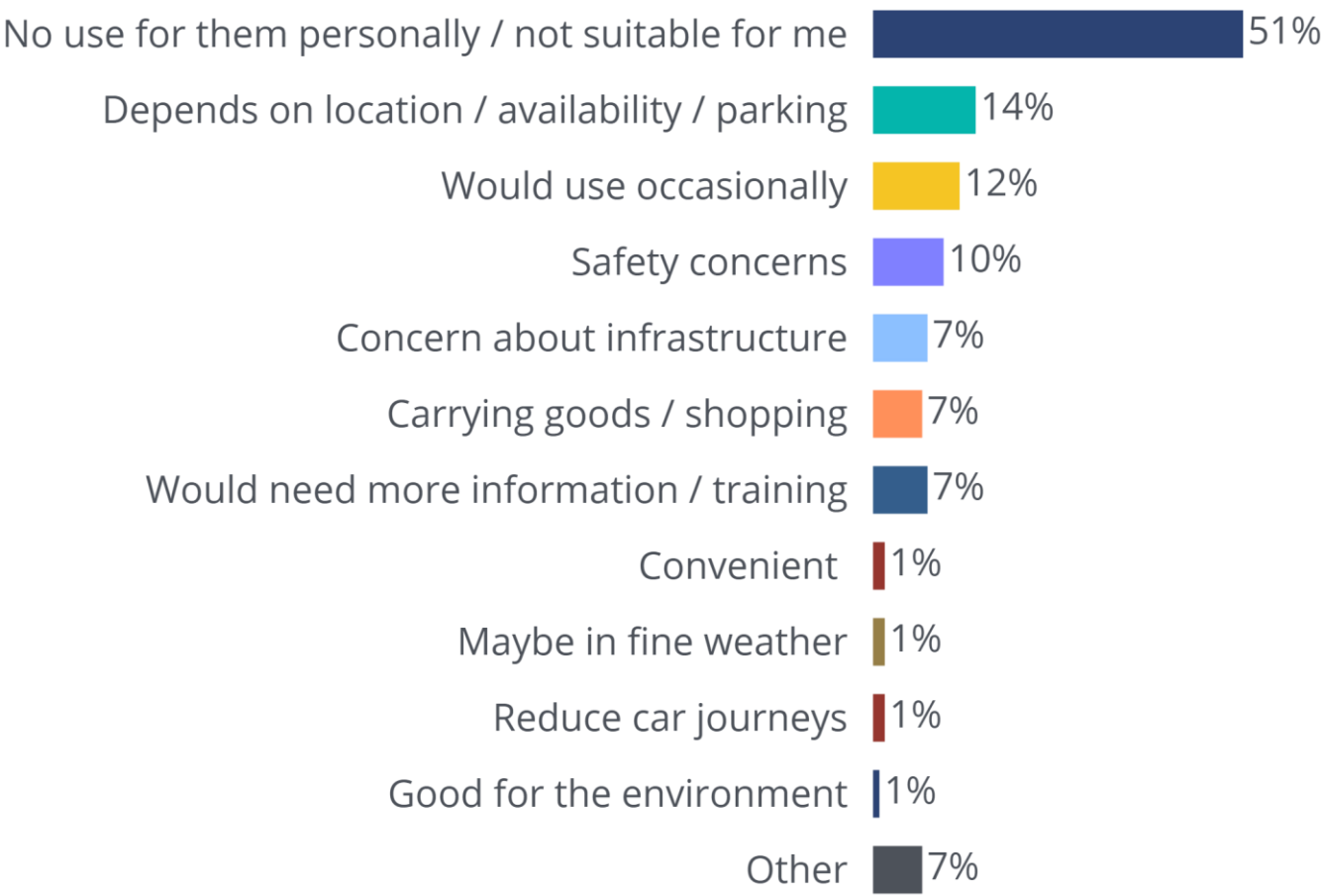
As an alternative way of transporting shopping / other goods was the most common reason cited for being very likely to use a shared e-cargo bike scheme.

Reasons "Somewhat likely" to use a shared e-cargo bike scheme in Dublin



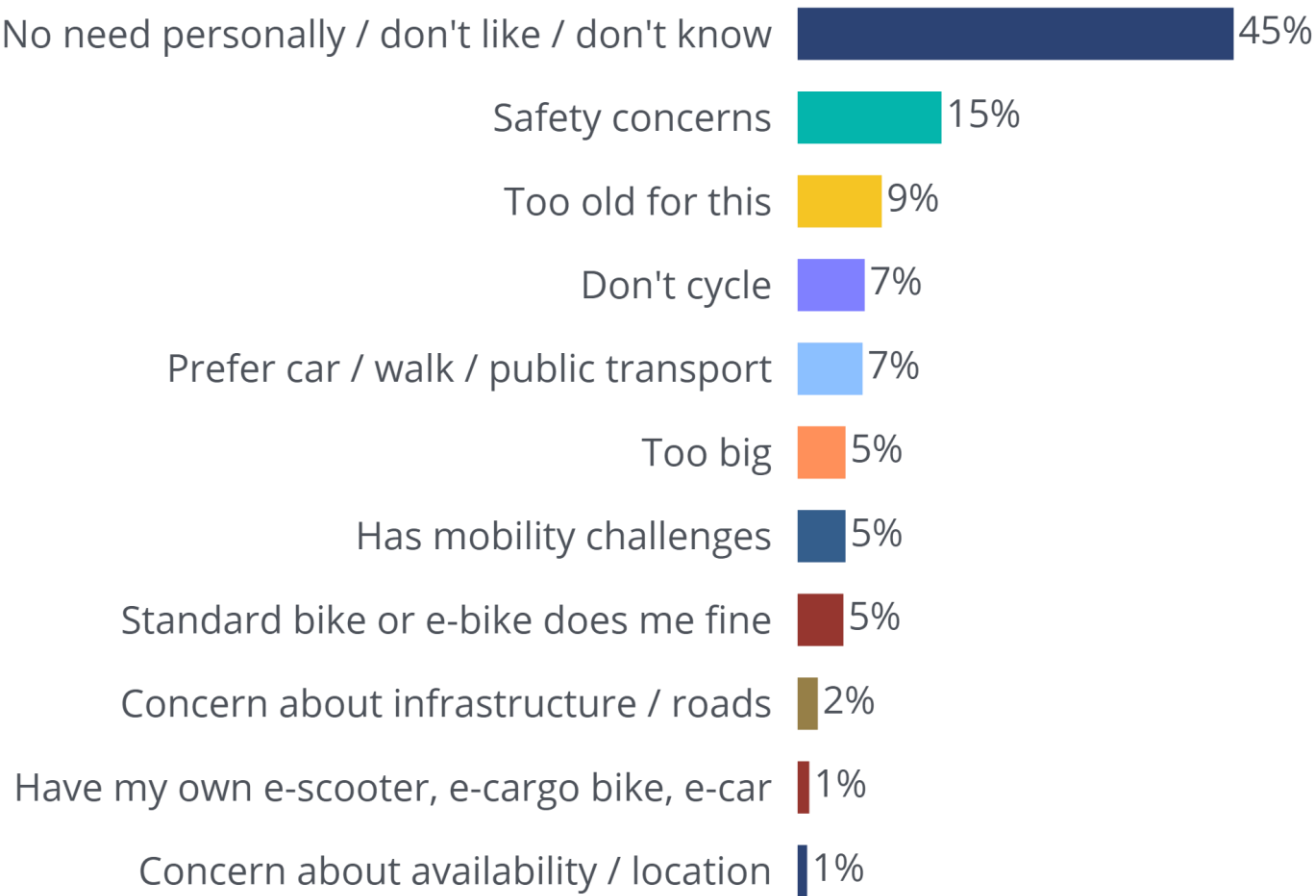
Carrying goods / shopping was the most common reason cited for being somewhat likely to use a shared e-cargo bike scheme, with concerns about availability, safety and infrastructure also expressed.

Reasons "Neutral" about using a shared e-cargo bike scheme in Dublin



Most respondents indicating "neutral" for using a shared e-cargo bike scheme simply felt that this was not of use to them or suitable for them personally.

Reasons "Unlikely" to use a shared e-cargo bike scheme in Dublin



The most common reason for being unlikely to use a shared e-cargo bike scheme in Dublin was that this was not of use to the respondent personally.

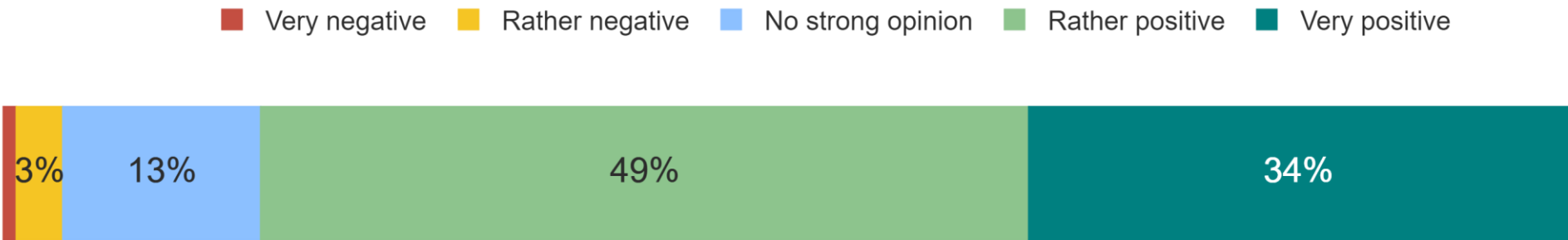
Others expressed safety concerns, felt that they were more suitable for younger people, or indicated that they did not cycle.

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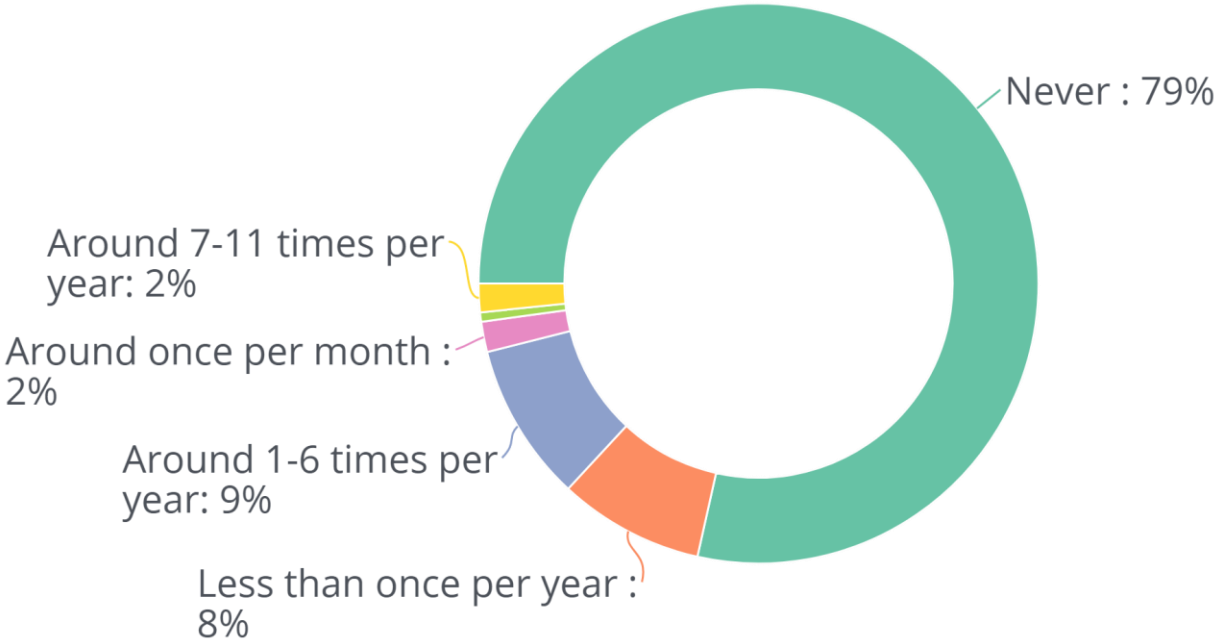
Car clubs provide access to pay-as-you-drive vehicles for people who sign up as members. Three companies are currently licensed to operate car clubs across Dublin City. Car clubs provide on demand cars that can be leased for as little as an hour. Licensed car club vehicles can be parked in pay-and-display parking locations through Dublin City for free.

Do you think car clubs have an overall positive or negative impact?



83% feel that car clubs have an overall positive impact

Have you ever used a car club service in Dublin before?



21% had used a car club service in Dublin at least once

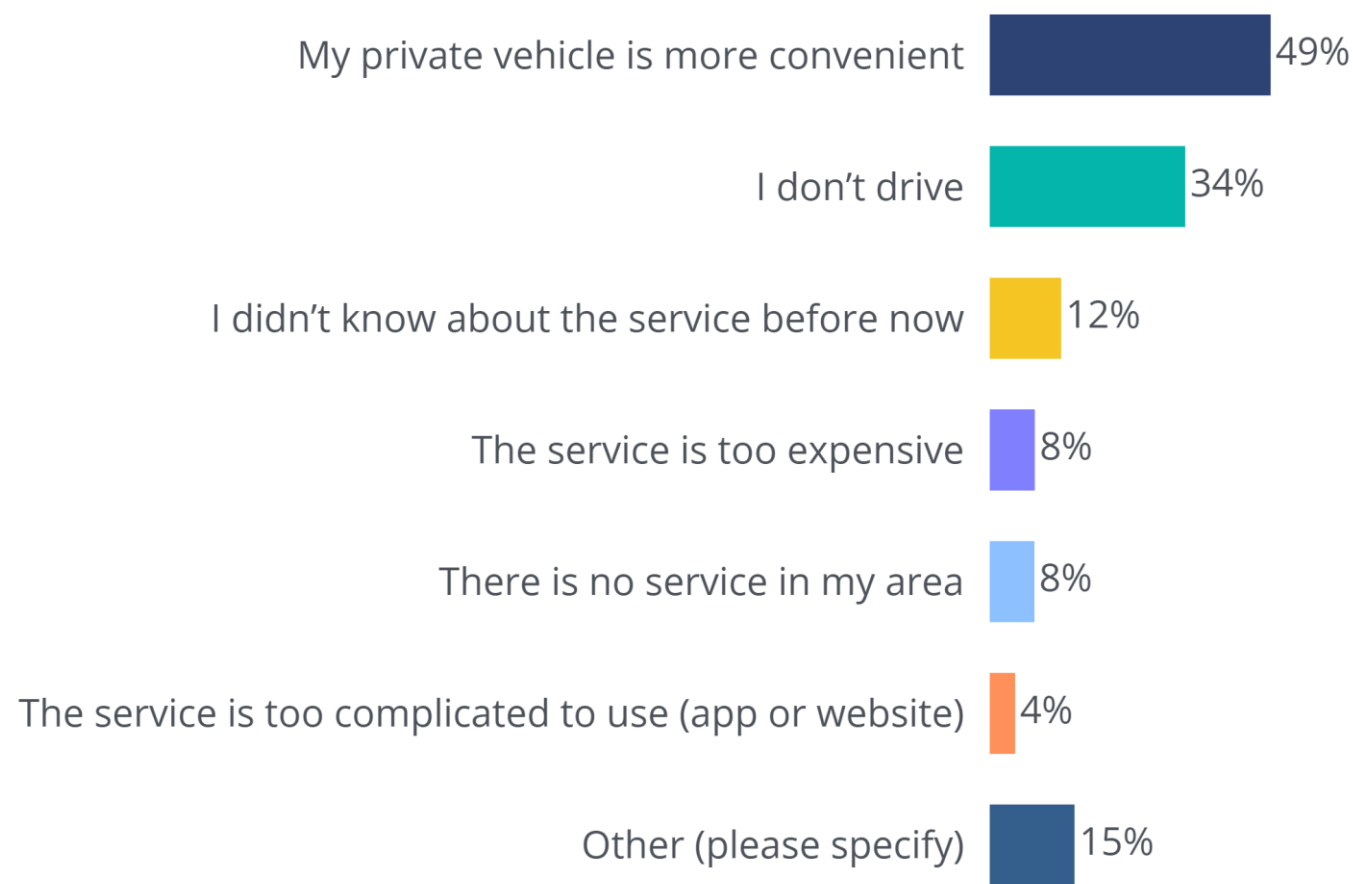
Male respondents (**27%**) are almost twice as likely as females (**16%**) to have used a car club service

Dublin City Council based respondents are more likely to have used a car club service - highest in Central Area at **31%**

Respondents with children in the household are more likely to have used a car club service (**27%**)

Use of car club services rises as disposable income rises

Why have you never used a car club service in Dublin? Please select as many reasons as apply.



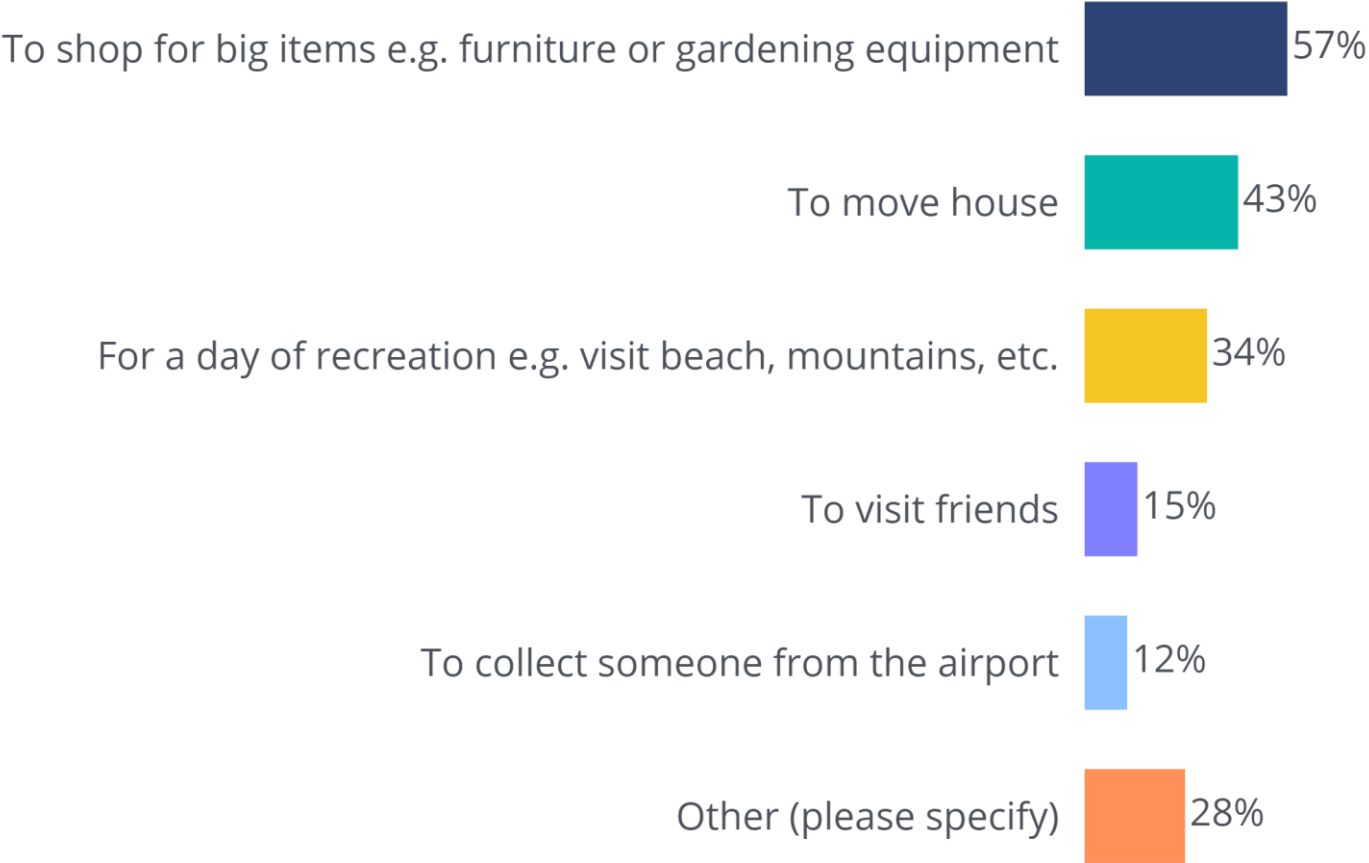
49% of those not using a car club service in Dublin feel that their private car is more convenient. This rises to 60% among those working outside the DCC local authority area.

34% simply do not drive.

Younger respondents were less likely to select "My private vehicle is more convenient" and more likely to select "I don't drive".

Respondents with higher monthly incomes were more likely to prefer the convenience of their private car, while those with lower monthly incomes were more likely to not drive and were less aware of the service.

What are the main reasons you have used a car club service in Dublin? Please select as many as apply.



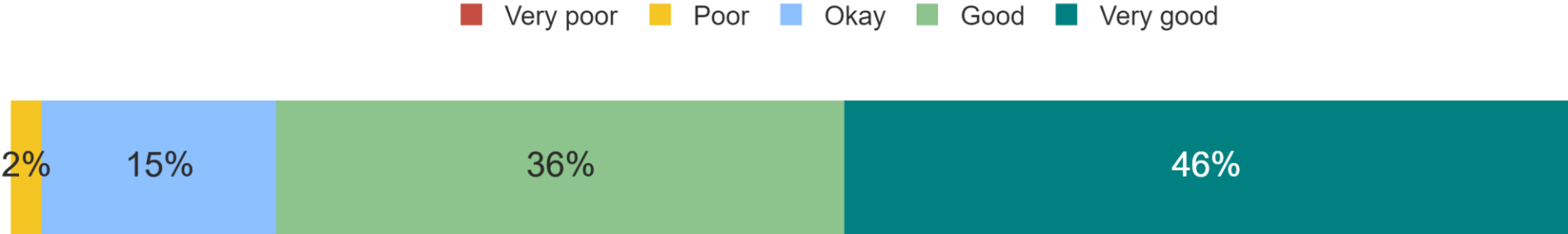
57% of those using a car club service in Dublin had done so to shop for big items

43% had used a car club service to move house (**66%** among under 35s)

34% had used a car club service for a day of recreation

"Other" includes when main / family car is not available – most common among those with children in the household

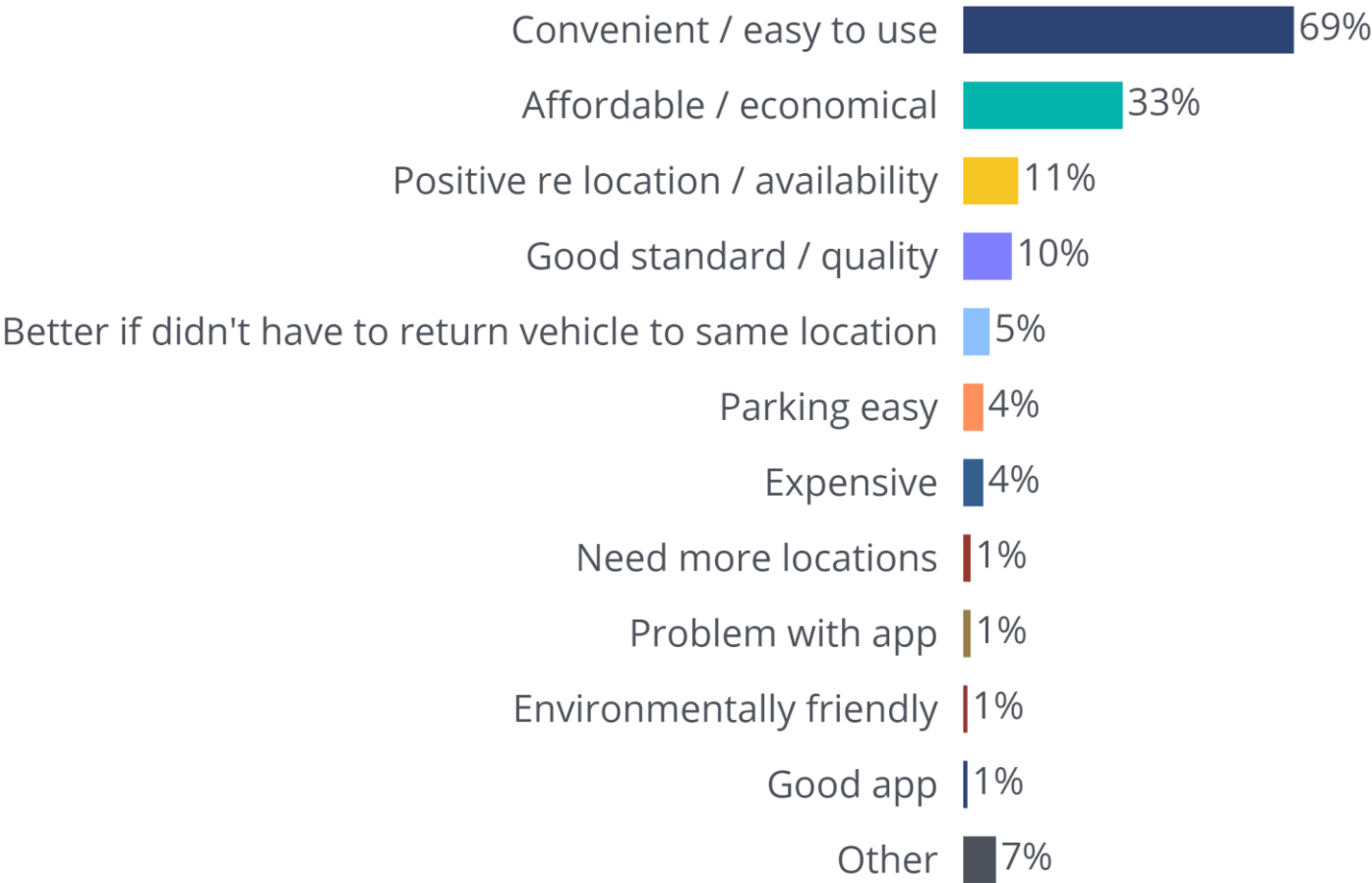
Overall, how did you find the experience of using a car club service in Dublin?



82% of those who had used a car club service in Dublin found the experience good or very good.

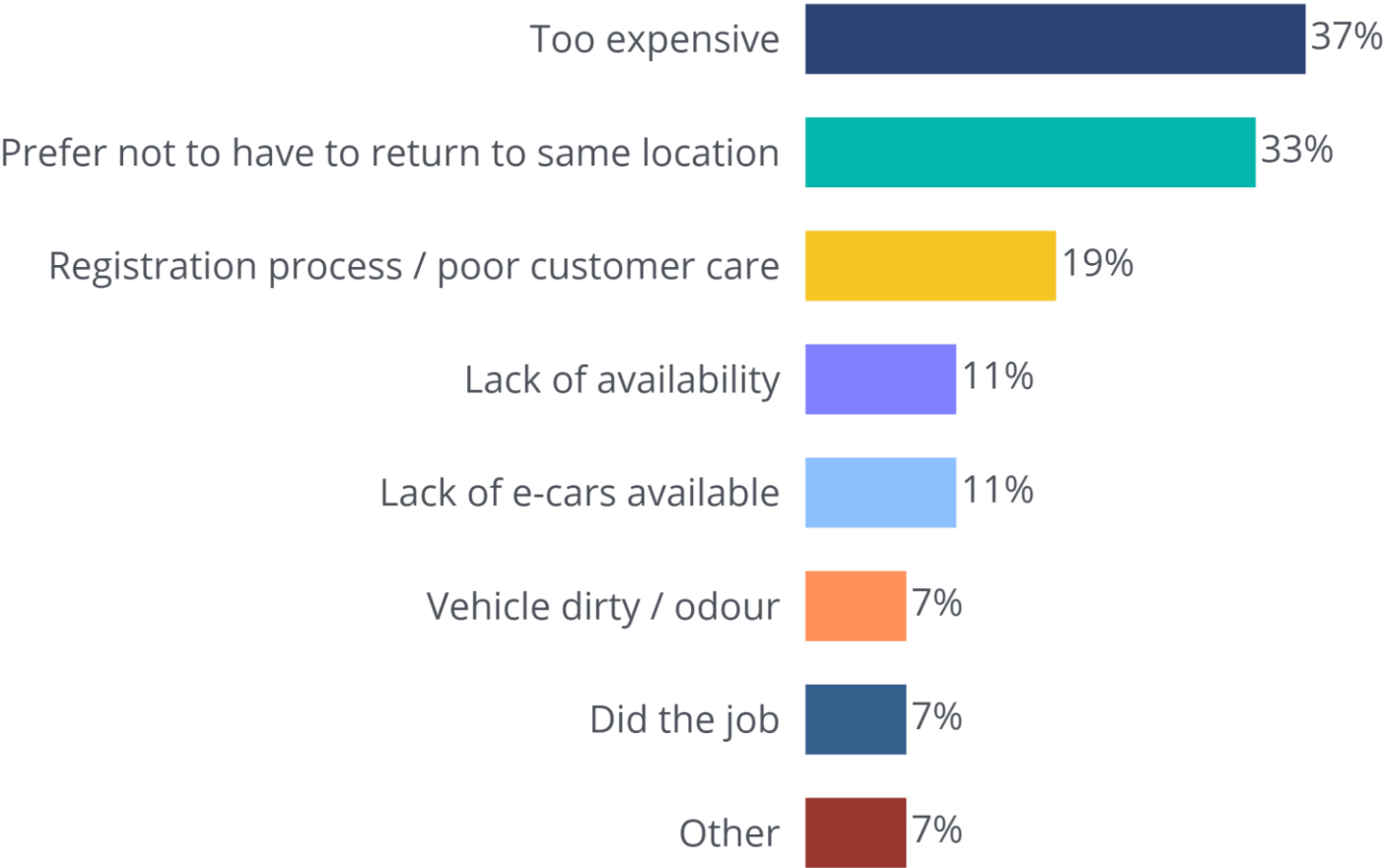
Dublin City Council based respondents reported a more positive experience of using a car club service (**86%** good or very good).

Reasons car club service "Good" or "Very good"



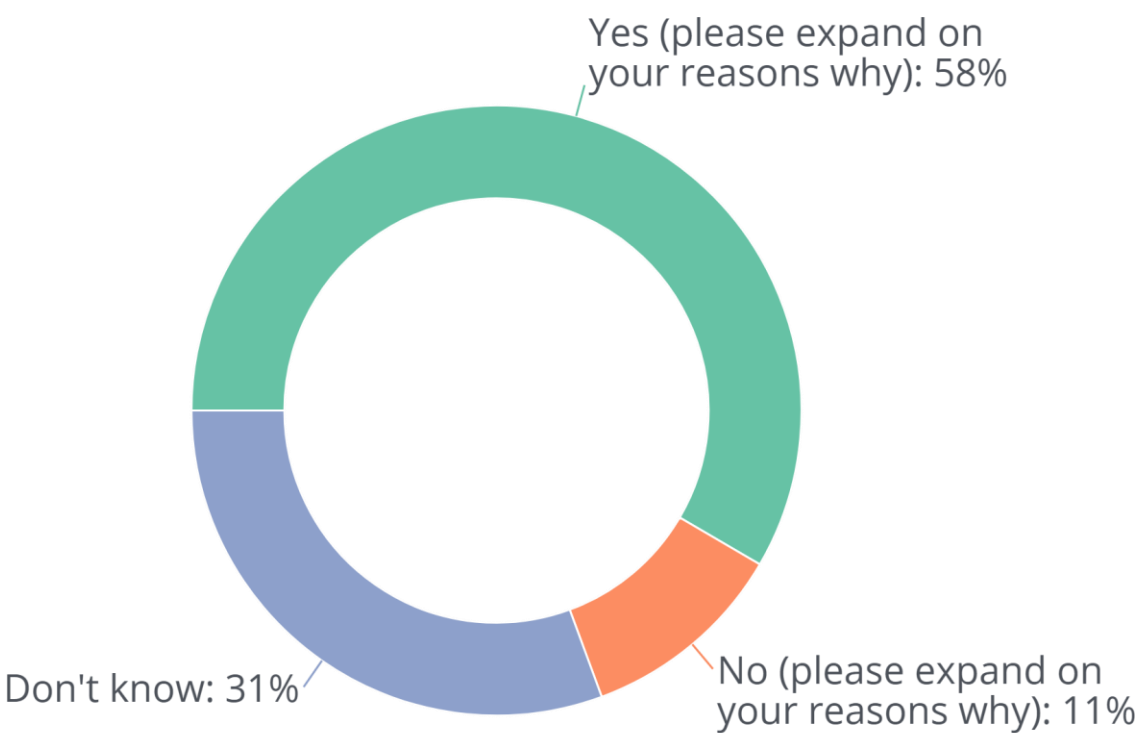
Convenience / ease of use was the most common reason cited for a positive experience with a car club.

Reasons car club service "Okay"



Expense and having to return the vehicle to the same location were the most common reasons for a less than satisfactory experience with a car club service.

Do you think there should be an increase in the availability of car club services in the City?



58% of respondents feel that there should be an increase in car club services in Dublin

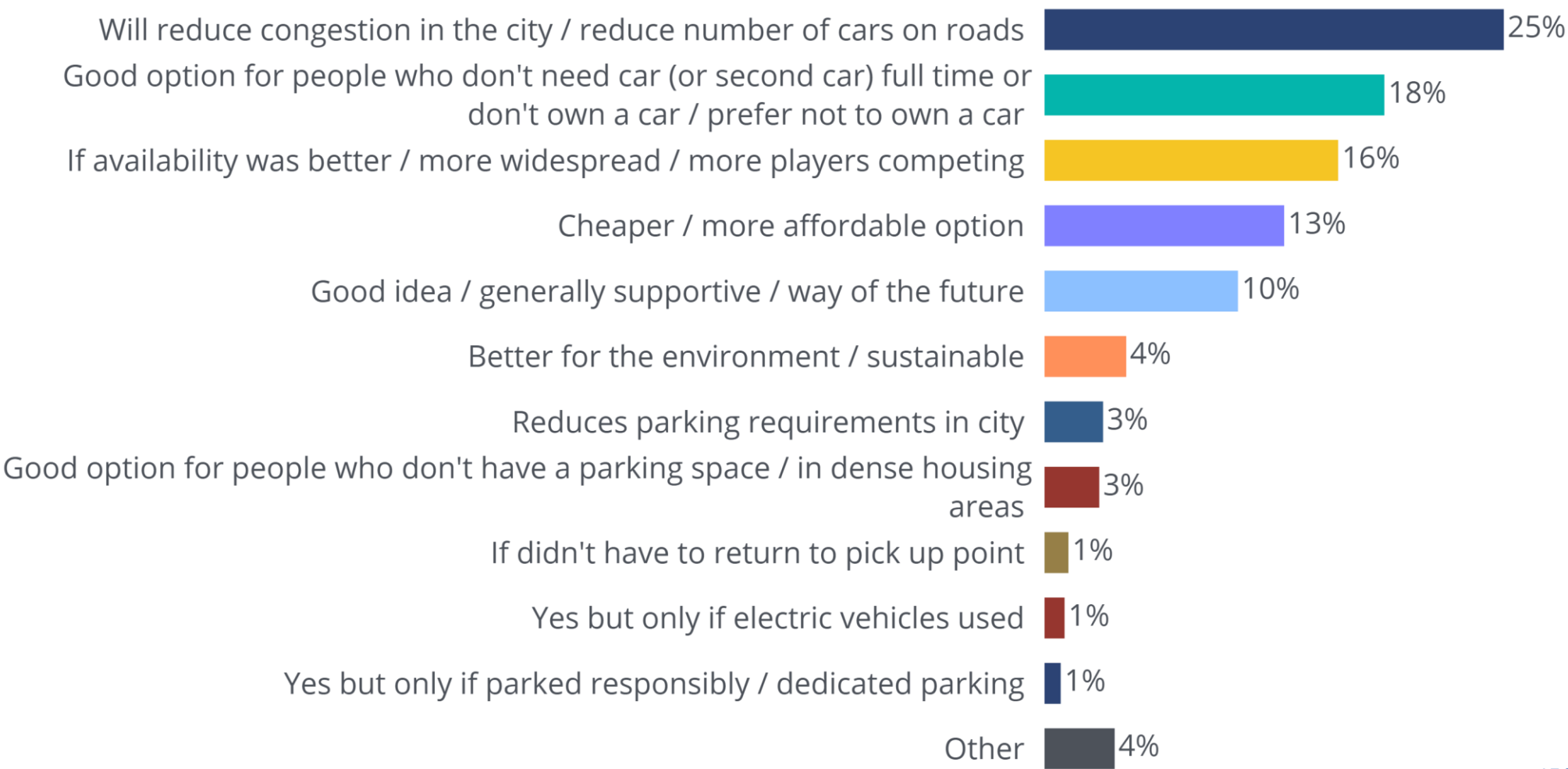
Dublin City Council based respondents are more likely to support an increase in car club services, and this is highest in the Central Area at **66%**

Support for an increase in car club services increases as disposable income increases

Those with no mobility challenges are more likely to support an increase in car club services.

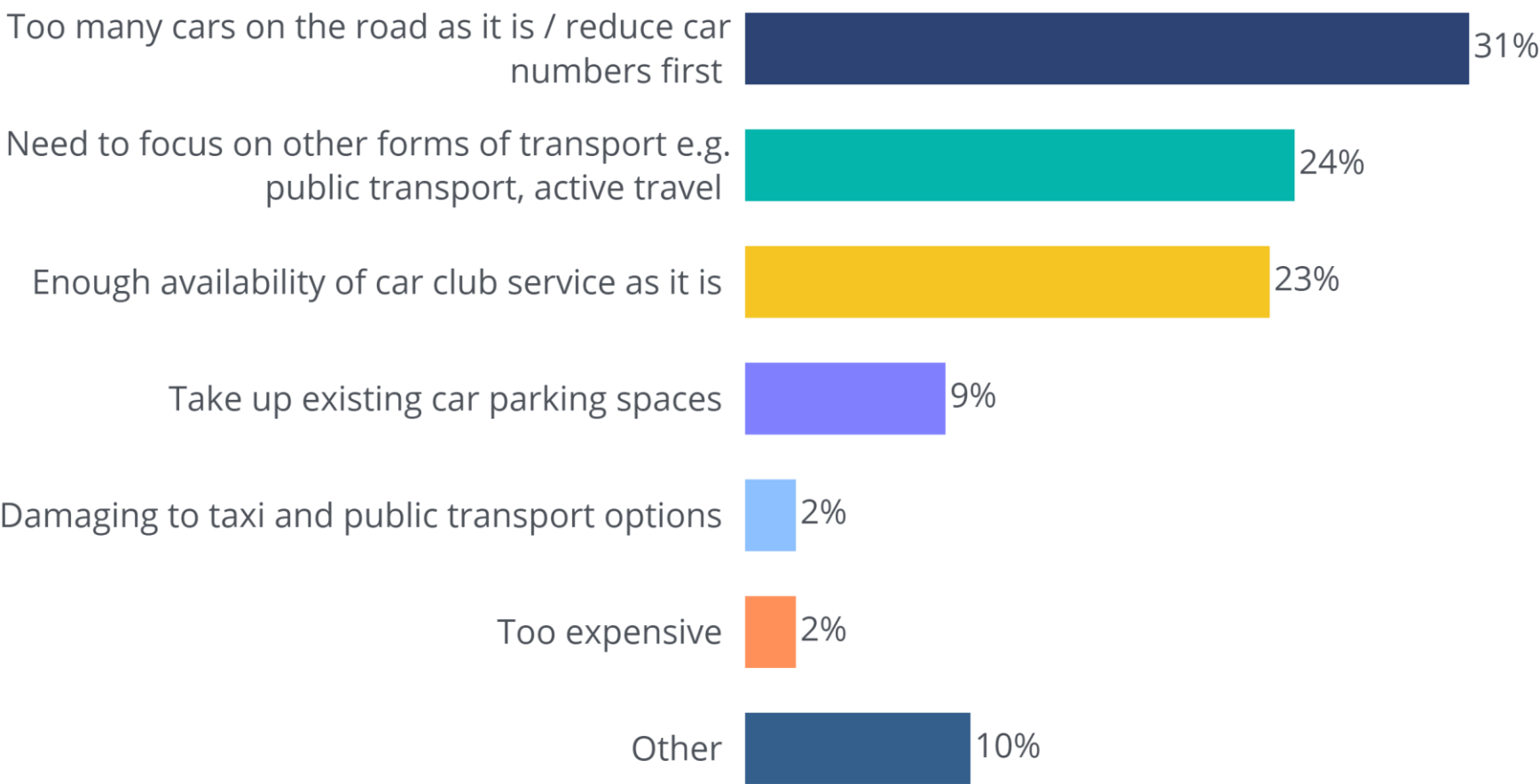
Do you think there should be an increase in the availability of car club services in the City?

Reasons "Yes"



Do you think there should be an increase in the availability of car club services in the City?

Reasons "No"

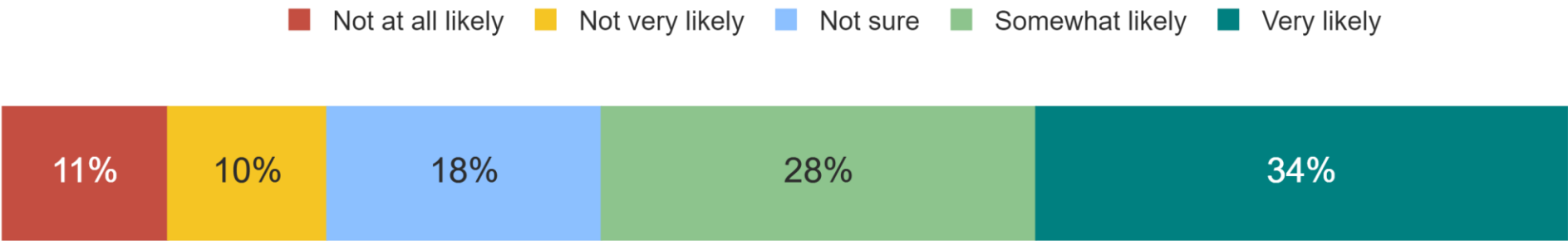


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Shared Mobility Hubs are designated locations where members of the public can rent a range of different shared mobility options such as cars, bikes or e-scooters.

If a Shared Mobility Hub was introduced in your area how likely would you be to use it?



62% indicated that they would be somewhat or very likely to use a Shared Mobility Hub if introduced in their area.

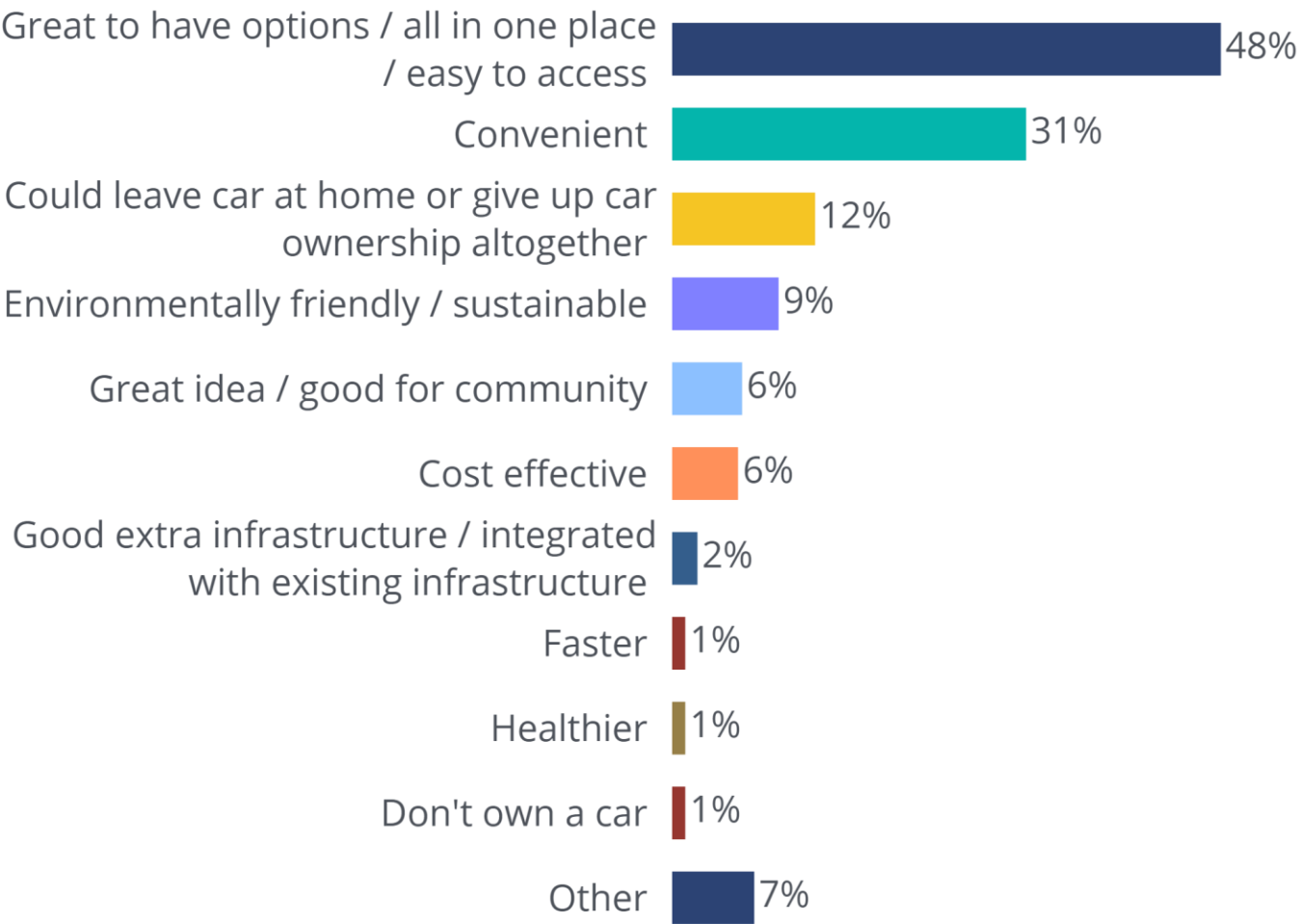
This rises to **78%** among under 35s.

Those with no mobility challenges are almost twice as likely to use a Shared Mobility Hub as those with mobility challenges (**64%** and **34%** respectively)

Likelihood of using a Shared Mobility Hub increases as disposable income increases.

Likelihood of using a Shared Mobility Hub is highest in the Central (**70%**) and South Central (**74%**) Areas

Reasons "Very likely" to use a Shared Mobility Hub in Dublin



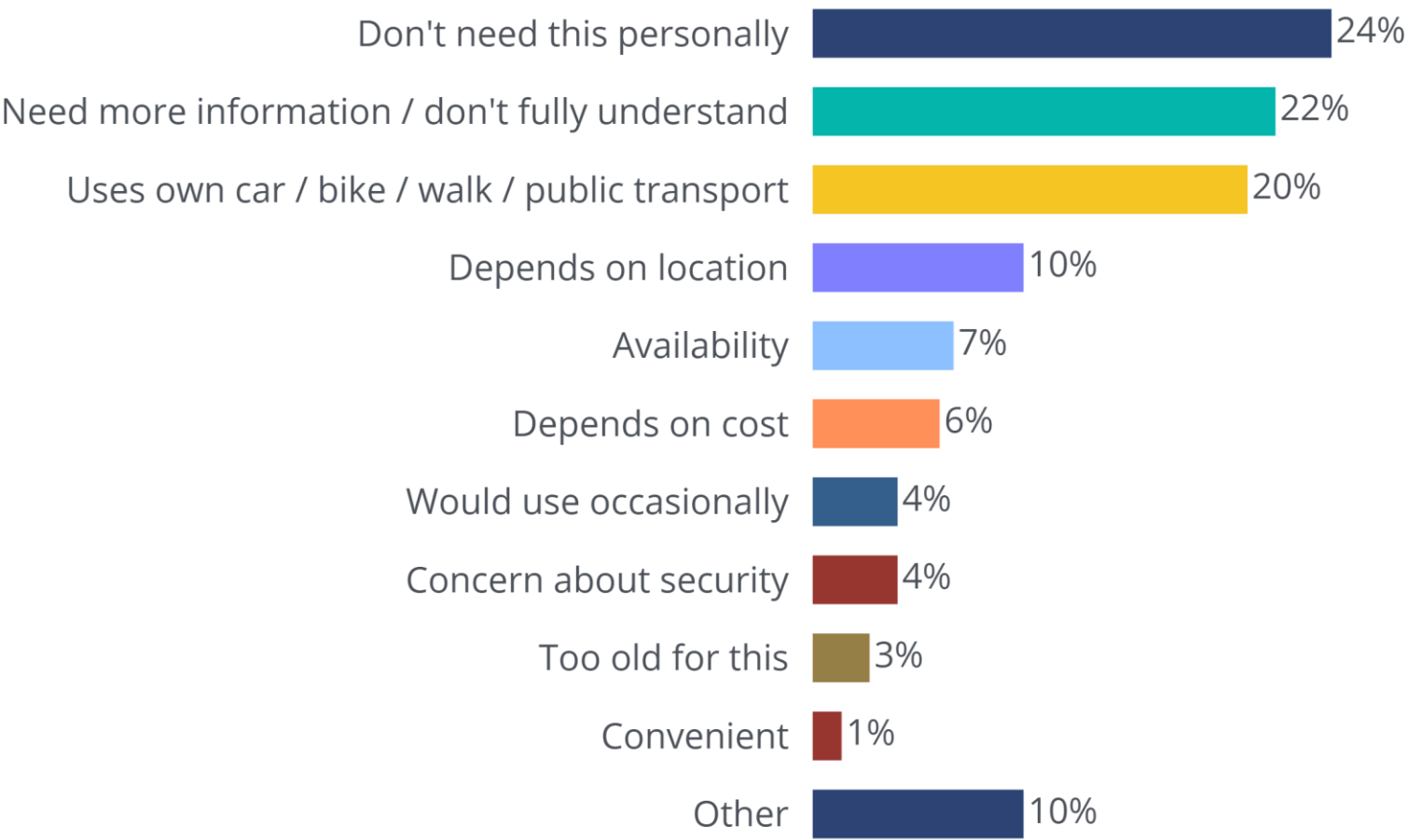
Having all the options in one place, convenience, and potentially giving up car ownership were all common reasons for being very likely to use a Shared Mobility Hub in Dublin.

Reasons "Somewhat likely" to use a Shared Mobility Hub in Dublin



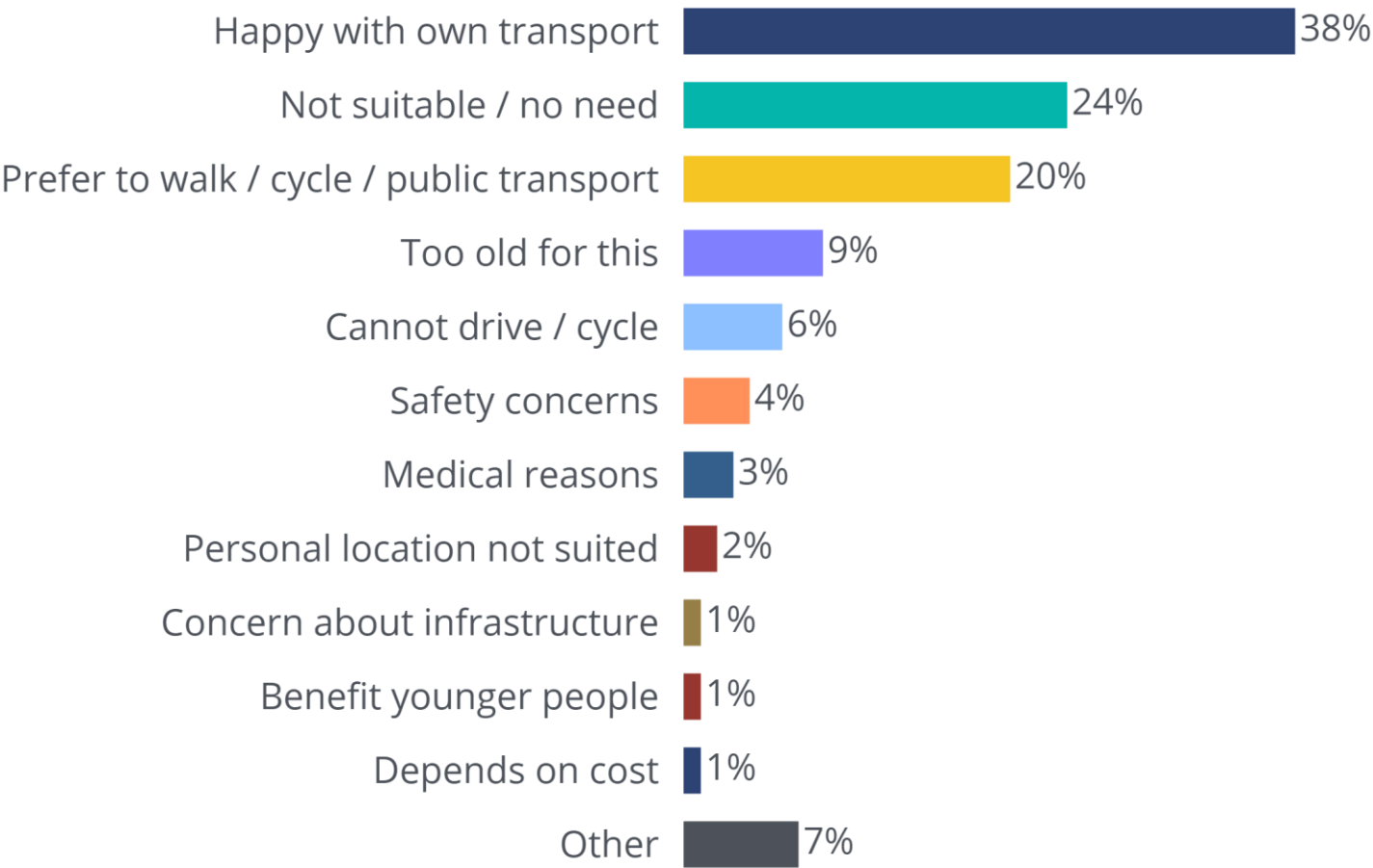
Convenience and having everything in one place were common reasons for being somewhat likely, with these respondents indicating their use would depend on the location and cost among other considerations.

Reasons "Not sure" about using a Shared Mobility Hub in Dublin



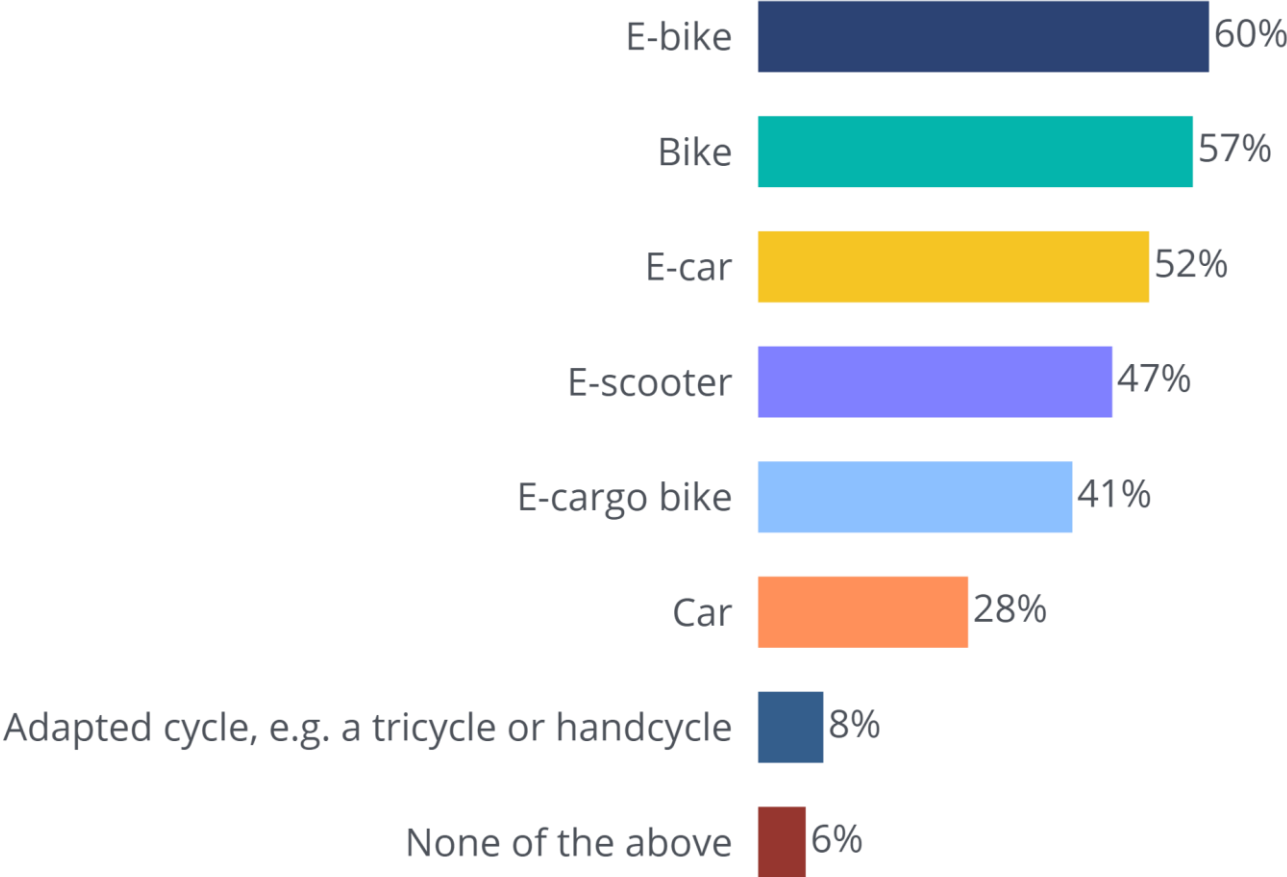
The most common reasons for being "not sure" about using a Shared Mobility Hub included not needing the service personally, needing more information about the service, and being satisfied with current transport options.

Reasons "Unlikely" to use a Shared Mobility Hub in Dublin



The most common reason for being unlikely to use a Shared Mobility Hub was being happy with their own transport or transport options.

If a shared mobility hub was introduced in your area, what mobility options would you use?



E-Bikes and Bikes are the most popular options that respondents would use if a Shared Mobility Hub was introduced in their area.

For further information please
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