

# **Shareable Dockless Mobility Device 90 Day Report to Council**

## **Office of Mobility Planning**

Presented to Public Safety and Legal Administration Committee - April 23, 2019  
Presented to Transportation Committee - April 24, 2019



Department of  
**CITY PLANNING**

# Introduction

## Shareable Dockless Mobility Devices Summary

In the past year, the Department of City Planning (DCP) has worked to address the proliferation of Shareable Dockless Mobility Devices (SDMD) in Atlanta, which include bikes, e-bikes, and electric scooters. Companies' app-based technology allows users to locate and rent SDMDs placed throughout cities on a per-ride or per-time basis. This is a departure from the more familiar docked model of bike sharing, in which an Operator's fleet is rented from and returned to a number of purposefully sited hubs and riders often utilize day or monthly passes.

The dockless model is viewed as having great potential for increasing urban mobility and last-mile connectivity but has administrative, operational, and regulatory challenges related to safety and mobility. The City has a substantial interest in ensuring the operation of these devices protects public safety and that the public right of way remains safe and obstruction free.

## Ordinance 18-O-1322

Ordinance 18-O-1322 was passed in January 2019 to regulate SDMDs. The permit process was subsequently developed, and SDMD Permits were issued starting February 1, 2019. The ordinance called for a follow up report to assess the successes and needs for improvement to the SDMD Program.

- *Section 7: Ninety (90) days from the effective date of the amendments in this Ordinance, the Office of Mobility Planning shall produce a written report clarifying their legal and policy rationale or creating fleet size calculations including any fleet size maximums and minimums. The report shall also clarify from a legal, policy, and scientific data perspective, any growth or shrinkage standards. This report shall be created in conjunction with all operators permitted to operate in Atlanta in accordance with this Ordinance; and shall be presented to the Public Safety and Legal Administration and Transportation Committees of the Atlanta City Council.*
- *Section 8: In creating the report referenced in Section 7, the Office of Mobility Planning shall work with operators permitted to operate in Atlanta in accordance with this Ordinance to assess the current state of scooter/dockless mobility sharing in Atlanta; and use the data provided in accordance with this Ordinance to conduct this report.*

This document was created by City Staff in the Office of Mobility Planning, in coordination with all Permitted Operators, to provide an update on the program and to provide a legal, policy rational establishing fleet maximums.

## Program Highlights

- Overall, the Office of Mobility Planning is pleased with the first few months of the program. We continue to create and improve administrative processes and communication channels with Operators. While we continue to collect and analyze data on devices, not all Operators are launched and we do not know the full program impacts.
- Overall, Operators describe the state of micro-mobility as positive with room for improvement.
- Permits were required for all Operators starting February 1, 2019. Since that time, six companies have received a Permit. Only four companies have deployed devices.
- Total Permitted devices: 10,500
- Over 645,000 Trips have occurred since February 1, 2019
- Lack of sufficient bike and sidewalk infrastructure is a key challenge.



# General Feedback from Operators

1. What is your role in the company?

- Operations Manager
- Government Relations
- Community Affairs Manager
- General Manager
- Operations Team Lead
- Operations Specialist
- Partner Experience Manager
- Policy Team

2. How long have you worked with this company? Ranged from 2.5 months - 2.5 years

3. As a company, we are satisfied with the City of Atlanta Shareable Dockless Mobility Device Permit Process.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
		1	6	

4. The first full month of permitted operations in Atlanta was successful.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
		2	4	3

5. The City of Atlanta Department of City Planning has been responsive to inquiries about the program.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
	1	1	3	3

6. The City of Atlanta Department of Public Works has been responsive to inquiries about the enforcement.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
	3	1	3	

7. As a company, we are satisfied with the way in which the City of Atlanta responds to our feedback.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
	3		3	1

8. As a company, we are pleased with our relationship with City of Atlanta staff.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
		4	3	3

## How would you classify the current state of micro-mobility in the City of Atlanta?

Operators describe the state of micro-mobility as positive with room for improvement. Operators are grateful for the City’s micro-mobility efforts and appreciate how open and responsive the City has been.

Operators state that demand for transportation alternatives is strong, but the availability of safe protected facilities is weak.

Operators believe the open market is leading to overcrowding of companies and that there may soon be too many Operators. Further, Operators say that more devices are needed to fulfill demand in areas such as MARTA rail stops where first/last mile connections are important.



# Permitting Process

## Shareable Dockless Mobility Device Annual Permit

The permitting process is initiated by the Operator's submission of a physical copy of the SDMD Annual Permit Application, which is available on the City's website, to DCP Office of Zoning and Development. The Office of Mobility Planning then reviews and issues permits. Annual permits cost Operators \$12,000 for 500 devices and an additional \$50 per device after that. An annual permit for 2,000 devices costs Operators \$87,000.

## Permitted Fleet Size

The SDMD Annual Permit allows Operators to permit up to 2,000 devices. Should an Operator choose to permit fewer than 2,000 devices during the initial application process, they will have the option to submit the Permit Amendment Application for Fleet Expansion at any point during the operational year.

The Commissioner of City Planning was empowered through legislation to establish fleet maximums. A discussion of the legal and policy rational for having fleet maximums is included in this report under *Ongoing Challenges and Opportunities*.

## Temporary Fleet Expansion

City staff and Operators agree that large special events can induce additional demand for SDMDs and that the public interest can be served by providing Operators with a process through which they are permitted to temporarily deploy an expanded fleet of devices. The Commissioner of the Department of City Planning is empowered to declare specific special events as cause to allow Operators to voluntarily expand their fleets. Following the Commissioner's administrative declaration, Operators may obtain a SDMD Temporary Expansion Permit Application for up to a stated maximum number of devices for a temporary period. There is a \$4 per device fee established in the Administrative Regulations for these expansions. To date, this has only been allowed for the Super Bowl with Operators invited to apply for an additional 1,000 devices.

## Permit Launch

Both the City and Operators had a strong interest in launching the permit system in time for the Super Bowl weekend events. The City required all interested Operators to be officially Permitted by February 1, 2019. Companies worked with the City to provide all necessary documents on a short time frame, and the City worked to expedite review for four Annual Permits and two Temporary Fleet Expansion Permits.

## Operator Feedback

How would you describe your experience with the permitting process?

Overall, Permitting was straightforward, accommodating, transparent and responsive. Turn-around times for Operators getting Permitted at beginning of February was too short. However, the City was responsive, flexible, and willing to work with Operators given the time frame.

What feedback would you like to provide concerning ways in which the permit process might be improved?

Requests to improve the Permitting process include:

1. Providing a longer time-frame to complete permit
2. Not having a deadline that coincides with a major event.
3. Simplify fee payment process. Currently requires trips to multiple departments. Is confusing and causes delays.
4. Required that each mobility company operations vehicles be given parking permits to make it easier to deploy scooters throughout the city.
5. Better define process on how to permit additional devices.



## City Feedback

This first round of permits did occur on a short time frame. The City worked with all companies to accommodate efforts during this period and were pleased with the effort to get all documentation in quickly. After February 1<sup>st</sup>, 2019, permit applications have been accepted on a rolling basis and there is no time frame in which permits must be completed.

The City will continue to work on clarifying and enhancing communication around the permit process to ensure all Operators have the information they need to apply.

## Permits

### February 2019 - Permits

SDMD Permits were issued starting February 1, 2019. Four companies were permitted at that time with an Annual Permit. Simultaneously, two companies gained a Temporary Fleet Expansion Permit for weekend of the Super Bowl.

	Annual Permit	Temporary Fleet Expansion (Super Bowl, Feb 1-4)	Fee
<b>Bird</b>	2,000 Scooters	1,000 Scooters	\$91,100
<b>Jump</b>	2,000 (1,200 Bikes, 800 Scooters)		\$87,100
<b>Lyft</b>	1,000 Scooters		\$37,100
<b>Lime</b>	2,000 Scooters	1,000 Scooters	\$91,100
<b>Total</b>	<b>7,000</b>	<b>2,000</b>	<b>\$306,400</b>

### March 2019 - Permits

In March, Lyft expanded their fleet size, and Jump shifted the balance of their device types. Two additional companies were Permitted, but as of March 31, were not yet launched.

	Annual Permit	Fleet Size Expansion	Fleet Type Rebalancing	Fee
<b>Gotcha</b>	500 (250 Bikes, 250 Scooters)			\$12,100
<b>Spin</b>	2,000 Scooters			\$87,100
<b>Jump</b>			1,000 Bikes, 1,000 Scooters	\$0
<b>Lyft</b>		1,000 Additional Scooters		\$50,000
<b>Total</b>				<b>\$149,200</b>

As of 4/17/2019:                      10,500 Devices Permitted  
     8,000 Devices Launched  
     \$455,600 in Permitting Fees Collected



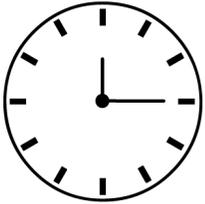
## An Average Day for SDMDs in Atlanta



11,534 Trips per Day  
2.9 Trips per Device



11,189 Miles per Day  
1.0 Miles per Trip



15.4 Minutes per Trip



\$3.06 Cost Per Dockless Trip



\$2.50 or less, Cost per MARTA Trip



# Statistics: Operations and Device Usage

Overall Statistics by Month					
	February Total	March Total	Super Bowl Weekend (Feb 1-4)	Weekends	Weekdays
<b>Total Number of Trips</b>	313,434	363,032	89,446	289,191	391,373
<b>Average Trips Per Day</b>	11,340	11,711	22,361	16,065	9,545
<b>Minimum Number Devices Deployed Per Day</b>	4,346	3,682	NA	NA	NA
<b>Maximum Number Devices Deployed Per Day</b>	6,308	5,042	NA	NA	NA
<b>Average Trip Duration (minutes)</b>	15.3	15.5	17.2	16.0	15.1
<b>Total Miles Ridden</b>	289,240	370,899	71,606+	288,757	371,382
<b>Average Miles per Trip</b>	1.0	1.0	1.0	1.0	1.0
<b>Average Dockless Trip Cost</b>	\$2.93	\$3.08	\$3.18	\$3.17	\$3.01
<b>Average Cost of a MARTA Ride</b>	\$2.50 or less	\$2.50 or less	\$2.50 or less	\$2.50 or less	\$2.50 or less
<b>Utilization - Average Trips per Device</b>	2	3.2	3.7	3.6	2.6

Utilization rate per company		
	Trips Per Device – February	Trips Per Device – March
<b>Company 1</b>	0.9	1.2
<b>Company 2</b>	2.4	3.4
<b>Company 3</b>	2.5	3
<b>Company 4</b>	4.2	5.3

## Key Challenges

### Inadequate Infrastructure and Unsafe Riding Behavior.

Lack of adequate sidewalk space and bike infrastructure leads to challenges in micro-mobility. Sidewalks are frequently narrow or non-existent. Other popular locations such as those off the BeltLine may not have sufficient space for parking devices. This leads to difficulty in the Operators and Users finding legal parking places. Additionally, the lack of bike infrastructure on many routes leads people to ride on the sidewalks.

### City Strategies to Address Challenges.

The City is responding to these challenges through education and enforcement strategies.

1. The City continues to plan for and invest in safe and connected infrastructure for all modes of transportation.
2. The creation of a comprehensive education strategy for users, stakeholders, and enforcement officials will help create better understanding and compliance of SDMD use.
3. The Department of Public Works is enforcing parking regulations by impounding devices found to be parked illegally and the Atlanta Police Department is enforcing unsafe rider behavior.



# Education

## Company Efforts

Companies have been engaged in efforts to educate their staff and customers in a variety of ways:

- In-App User Education  
Operators continue to update their in-app notifications to inform users that Atlanta-specific regulations have been enacted. This is done with input from OMP staff. These efforts include displaying in-app pop-ups to reinforce Atlanta laws for general users and special event crowds, as well as displaying an in-app banner directing riders to the COA SDMD webpage.
- In-Person User Education  
Operators have worked to engage citizens, stakeholders, and their users in a variety of ways. They have met with local educational institutions to discuss education and outreach, partnered with local organizations to create education materials, presented at regional conferences and professional trainings and offered free classes to riders.
- Additional Educational Outreach Efforts  
Operators have engaged in numerous other efforts to educate the public regarding SDMDs and the rules regulating them. These include, but are not limited to, launching blogs and social media campaigns, discussing scooter education on location radio, informing riders about local efforts to improve bicycle and street infrastructure, advertising rules and good riding behavior on local signage, and emailing users about rules of the road.
- Staff Education  
Operators have provided education materials and information for deployment staff to address Atlanta-specific regulations and processes.

## Operator Feedback

How would you describe the success of your user and deployment team education efforts regarding the City's ordinance?

Operators believe that it is too early to know overall success of education efforts. The need for educational videos demonstrating good scooter behavior is needed.

Some Operators report that rider interest in educational classes and initiatives is near zero.

Operators encourage the City to help with education efforts around the rules and regulations.



## City of Atlanta Efforts

City of Atlanta staff are continuing to work to better educate citizens and stakeholders about SDMDs and the rules regulating them through our comprehensive #ScootSmart Education Campaign:

- Provide educational support for partner organizations  
This includes producing and sharing informative presentations, physical handouts, and social media posts and infographics. OMP is also presenting at meetings for partner organizations to inform relevant parties about regulations.
- Disseminate information through the NPU system  
The NPU system's utility as a communication conduit is being leveraged by providing NPU planners with an orientation related to the new legislation surrounding SDMDs so that they can make presentations to their respective NPUs during their monthly planner's reports. NPU planners are provided with physical handouts and information on where to direct residents who have additional questions or concerns.
- Distribute information through the City's digital communication channels  
These efforts include displaying graphics on TVs and displays throughout City Hall and pushing information and updates via the DCP various social media accounts (Facebook, Twitter, Instagram). Additional efforts are being made to ensure that all City departments are in possession of physical copies of infographic handouts and additional educational materials to support their own understanding and enforcement of regulations.
- Create Additional Supportive Content and Materials  
In addition to continuing to pursue appropriate opportunities to circulate the existing flier, City staff are working closely with members of APD to produce enforcement-specific quick reference guides for enforcement agents in the field, creating event-specific handouts to provide the public at special events, and creating a video campaign to demonstrate the rules and generally raise awareness around SDMDs and their role in Atlanta's mobility landscape.
- Press  
This includes coordinating a Channel 26 covered news story related to SDMDs and the rules regulating their operation, in addition to ensuring that any members of the larger journalism or media community have access to the accurate information they require.

## City Feedback

The City continues to pursue opportunities to educate city staff, partner organizations, and the general public about the regulations and best practices surrounding SDMDs. The City will have a strong education campaign push through the spring and early summer 2019, with updates throughout the warm summer and fall seasons.

The City acknowledges and appreciates education efforts put forward from Operators and is working to supplement those efforts through its own campaign. However, for a fully successful program, the Operators need continue to develop creative technological and outreach solutions to improve user education and behavior.



# Customer Service

## Parking Complaints and Impounding

Complaints about improperly parked devices can be reported in several ways. Users and community members are encouraged to report improperly parked devices directly to the companies. If a device is causing an immediate safety hazard, people should reach out to the City via 311. Parking violations are documented, and devices are impounded when the Department of Public Works SWEET Team scans the streets or responds to 311 requests.

	Company 1		Company 2		Company 3		Company 4	
	February	March	February	March	February	March	February	March
<b>Direct Reports to Companies</b>	153	106	131	81	14	10	88	52
<b>Department of Public Works Street Scans</b>	123	58	565	285	175	53	443	184
<b>Reports to 311 System</b>	58							
<b>Total</b>	2,579 Parking Complaints							

Operators were informed on February 1<sup>st</sup>, 2019 by DPW that the impound fee will be \$75 plus an additional \$25 storage fee incurred after the first day. This process and structure is currently under review by DPW.

### Operator Feedback

How would you describe your experiences with enforcement/impounding on city right-of-way and city property?

Some Operators say that the enforcement/impounding efforts have been reasonable and that DPW has been generally responsive to operations teams. Other Operators are frustrated about the lack of transparency and communication from DPW. They state that Atlanta impounds more devices than other cities.

Operators state they have difficulty proactively monitoring 2,000 devices at all times even though they do patrol the streets themselves. Operators are working on technology solutions to improve parking and look forward to working with the City to implement and test new ideas. Requests:

1. Clarify existing policies
  - Provide clear guidelines regarding the impound procedure and any associated fees.
  - Provide documentation of impounds including photos, location, ID number, and violation.
2. Desired changes to impounding policies:
  - Develop administrative citation process that allows companies notice of improperly parked devices prior to impounding. Allow the opportunity for companies to fix the problem first.
  - Schedule impound sweeps in the early morning, rather than at noon.

### City Feedback

DPW is tasked with enforcing illegal parking removal as per Sec. 150 of the city code. At this time, the primary mechanism for that is through impoundments. Operators have been informed that they should arrange for daily pick-ups and retrievals for their devices at the designated city-owned facility. Operators will be billed monthly for fees incurred.



DPW actively conducts enforcement throughout the day and may confiscate any egregiously parked devices. “Egregiously parked” devices are those that are seen to be obstructing and/or preventing 5 feet of clear pedestrian walk space as stated in the code, or any device that is creating an unsafe or hazardous condition for the public.

DPW will deploy an officer upon receipt of a 311 request or other notification from members of the public. Operators receive notification of a violation from each 311 request, and it is expected that the Operator will deploy someone immediately to attend to the matter. If an illegally parked device is identified by a city Officer while conducting routine code enforcement, DPW is currently not informing Operators of violations prior to impounding the scooter due to a combination of limited capacity and liability concerns.

The improper parking of devices throughout the City and scattered along sidewalks is a major concern for pedestrian safety and accessibility. DPW and DCP are working together closely to improve coordination, transparency, and communication. Both Departments will continue to work with Operators to minimize the burden on the City and maximize the efforts and effectiveness of Operators.



## Safety

The City of Atlanta takes safety concerns seriously. Companies report monthly updates of documented safety concerns from users, as well as any reported crashes or injuries. The City will work to enhance our understanding of safety from other sources including enforcement. As many crashes involve only the device user alone and not another vehicle, it is unlikely that enforcement officers will be called to the scene of all incidents. Therefore, it is likely that crashes and injuries are under-reported.

To this end, the Atlanta City Council has requested information from local health institutions to report on crashes and injuries with SDMDs. Data from that effort is not yet available.

Through monthly reporting, the City has requested information on crashes and injuries that have been reported directly to the company. The following table summarizes this information.

Reported Crashes and Injuries by Company, February-March 2019				
	Crashes, February	Injuries, February	Crashes, March	Injuries, March
<b>Company 1</b>	10	7	5	1
<b>Company 2</b>	16	5	31	11
<b>Company 3</b>	7	[A]	2	2
<b>Company 4</b>	7	4	10	4
<b>Total</b>	<b>40</b>	<b>16</b>	<b>48</b>	<b>18</b>

[A] The Operator indicated that injuries occurred but did not provide a number of injuries. DCP is working with the Operator to provide this data.

## Other Complaints

The community and device users report various complaints to companies directly. The largest category of user complaint reports addressed mechanical issues or damaged devices. Operators also report that lost and stolen devices are an issue they are encountering in Atlanta.

Reported Complaints by Category, February				
	Company 1	Company 2	Company 3	Company 4
<b>Mechanical Issue or Damaged Vehicle</b>	20	595	286	1,003
<b>Other, including: Fees &amp; Refunds, App Issues, Riding Behavior, and other</b>	38	589	609	714
<b>Total</b>	<b>58</b>	<b>1,184</b>	<b>895</b>	<b>1,717</b>

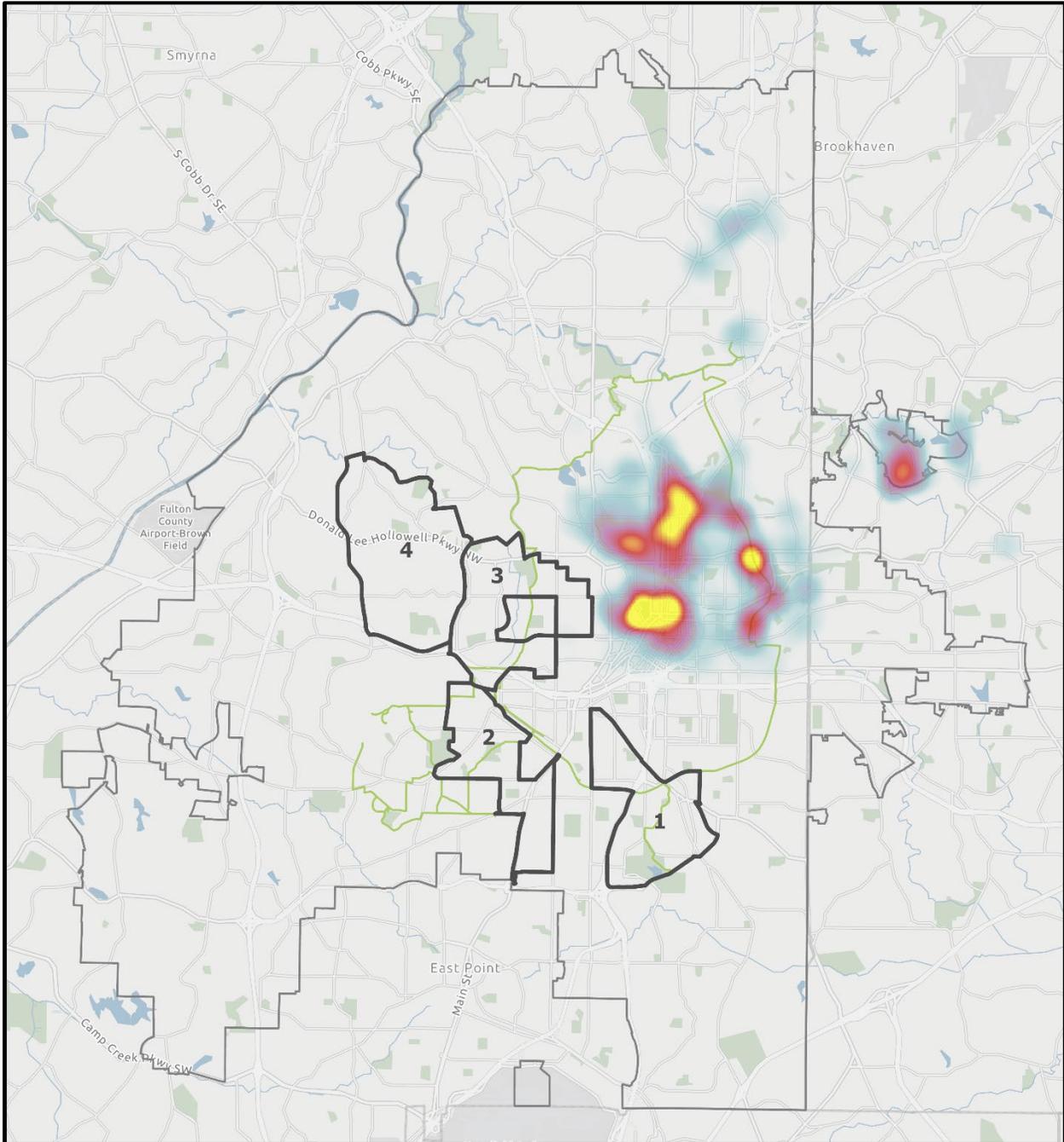
Reported Complaints by Category, March				
	Company 1	Company 2	Company 3	Company 4
<b>Mechanical Issue or Damaged Vehicle</b>	498	302	336	730
<b>Other, including: Fees &amp; Refunds, App Issues, Riding Behavior, and other</b>	1,400	372	725	246
<b>Total</b>	<b>976</b>	<b>674</b>	<b>1,898</b>	<b>1061</b>



## Service area

General services areas were defined in the Permit process. A heat map below shows the most heavily trafficked pick-up and drop-off areas from all deployed Operators. Most of the primary service areas are dense and urban in character. They reflect areas that are easiest to get around without a car and have some of the best access to protected bike facilities.

Together, the most heavily serviced areas cover over 152,000 Atlanta residents.



## Equity Zones

Permitted Companies are required to create an Equity Plan as part of the application and Permit. They are required to state what percent of their fleet they commit to deploying in each of the four Equity Zones. Commitments from companies ranged from 4% to 10% of each company's fleet spread across all four equity zones.

## Operator Feedback

What feedback can you provide concerning your experiences serving the City of Atlanta's Equity Zones?

Operators are not satisfied with Equity Zones. Ridership is reported as lower or much lower than other parts of the city. Operators believe this is due to lower density of the Equity Zones and some would prefer to deploy at MARTA stations. Operators also reported that vandalism of devices is higher than in other parts of the city and theft is reported as average or higher than other parts of city.

Some Operators are planning additional rider education efforts in Equity Zones and with the hopes that it increases ridership.

An ongoing challenge is that citywide, but in Equity Zones in particular, sidewalks are narrow and bike infrastructure is rare. This makes it difficult to find a legal place to launch devices in Equity Zones.

## City Feedback

DCP is analyzing potential changes to the Equity Zone boundaries based on stakeholder and Operator feedback. Any updates to the Equity Zone section of the Administrative Regulations will be announced in mid-May and effective June 1, 2019.



# Ongoing Challenges and Opportunities

## Large Events

The Office of Mobility Planning is working to better accommodate SDMD operations during large events. Our goal is to ensure SDMD parking and usage complies with City regulations and protects public health and safety. The Office of Mobility Planning is working with City Council Offices, the Department of Parks and Recreation, the Atlanta Police Department, and event organizers to better regulate operations during special events.

Any event coordinators that wish to consult with the Office of Mobility Planning to this end can contact us at [mobility@atlantaga.gov](mailto:mobility@atlantaga.gov).

## Data Reporting

Permitted companies are providing data through a variety of methods. Online dashboards allow City staff to monitor daily operations. Monthly reports provide daily and summary information about fleet operations, safety, and education efforts. The City is exploring alternatives to better receive and aggregate data from all Permitted companies to better facilitate data analysis and protect user privacy.

## Parking Zones

The City is working to develop Parking Zones that will designate appropriate parking locations in high-density, high-pedestrian-traffic areas. Interest in installing more permanent parking racks is being considered to facilitate orderly, designated parking locations across the City.

## Atlanta BeltLine

SDMDs are permitted along shared us paths included the Atlanta BeltLine and riders are required to yield to pedestrians. However, challenges with appropriate riding behavior and parking on the Atlanta BeltLine continue to be an issue. The fast speed of Devices is a safety concern, especially during weekend days when the space is crowded. The City is working with the BeltLine to develop strategies to improve overall etiquette on the BeltLine with specific efforts focused on rider behavior.

## Fleet Maximums

The Office of Mobility Planning worked collaboratively with other City Departments and Operators to develop a legal and policy rationale for any desired fleet size calculations including any fleet size maximums and minimums as well as any desired growth or shrinkage standards.

## Operator Rationale

There is no single Operator perspective, but there are a few themes and main points are listed below. Appendix A includes the full text of each Operator response.

- Some Operators expressed a desire to have some version of a performance-based fleet maximum. This would allow companies with higher ridership to deploy more devices. Both Bird and Lime proposed similar models for how to implement performance based fleet maximums.
- Other Operators expressed support for the consistent fleet maximum set at up to 2,000 devices per Operator.
- Several Operators expressed a concern over the increasing number of Operators joining the market and the potential for clutter as the number of Operators increases.



- Jump, one of the Operators with both scooters and bicycles expressed a desire to permit up to 2,000 scooters and up to 2,000 bicycles.
- Overall, Operators indicated that having more devices on the ground would result in more trips. However, one Operator expressed a concern that increasing the fleet size may result in Operators being less cognizant of how and where they deploy devices.

### **City Rationale**

From a legal perspective, DCP is empowered to establish fleet maximums that apply equally to all companies. Fleet maximums cannot be adjusted based on a company's performance and the City cannot restrict the number of entrants to the market. At this time, the Law Department advises against both performance-based fleet maximums as well as limiting the number of companies allowed to operate within the City.

From a policy perspective, DCP is committed to ensuring the SDMD program provides a high-quality mobility option while preserving pedestrian safety and accessibility.

DCP set the maximum fleet size at 2,000 based on operations in Atlanta before issuing the permit as well as experiences from other Cities. The Institute for Transportation and Development Policy published a Bikeshare Planning Guide that was cited by Jump and suggests a fleet of 2,000 bikes would be able to provide high quality service for a service area of up to 200,000 residents. Information cited by Bird suggests that Cities that allow Operators to deploy scooters in the thousands are able to have devices ridden regularly. The City is comfortable that the current fleet maximum allows companies the ability to provide a high-quality mobility service.

The City acknowledges that Operators may be able to increase profits with more devices. However, the City is concerned that Operators are still establishing their technology, operations, and education efforts. Operators have expressed concern with the number of devices impounded and Lime stated that they have difficulty proactively monitoring 2,000 devices at all times even though they do patrol the streets themselves and that the infrastructure in Atlanta does not accommodate scooter parking.

Given the recommendations from the Law Department, increasing competition within the market, and the need to improve parking and riding compliance, DCP is not adjusting the maximum fleet size at this time.

DCP continues to work with Operators and stakeholders to improve compliance and program operations and is committed to evaluating the need to revisit the legislation with Council after a year of experience.



# Summary

Overall, the SDMD Program is off to a generally positive start with room for improvement. SDMDs are providing a new mobility option for Atlanta residents with over 600,000 trips completed since the program launch on February 1<sup>st</sup>.

The City and Operators are working together to improve both the administrative processes and user behavior compliance. Based on initial results, the City will make adjustments in a few areas of the program, including:

1. Update to Equity Zones
2. Improvements to:
  - a. City communication process
  - b. City impound processes
  - c. Coordination with large events
3. Launch of Parking Zone Pilot

The key challenge continues to be a lack of adequate safe infrastructure needed for riding and parking SDMDs. The City is addressing unsafe riding with a combination of education and enforcement strategies that can improve rider behavior. The City will continue to address the infrastructure issue by investing in a transportation network that allows safe transportation for all people, whether they walk, bike, scoot, take transit, or drive.

The SDMD Program will continue to grow over the next months. Current Operators do not yet have fully deployed fleets and new Operators are seeking Permits. The City is committed to continuing to work with Operators, current and future, to ensure SDMDs provide a safe mobility solution for Atlanta.



# Appendix A

## Operator Rationale

### BIRD

Bird's mission is to make cities more livable by reducing car usage, traffic, and carbon emissions. Bird is committed to properly meeting rider demand in the communities we serve in order to provide a reliable form of transportation, and activate a transit mode shift among residents.

Today in Atlanta, all providers are allowed a maximum fleet of 2000 under the permit rules, although multiple providers, including Bird, were operating with fleets larger than 2000 in the months prior to the ordinance being in place in order to properly meet the demand we were seeing in Atlanta. We strongly believe that Atlanta should base fleet increases on a utilization/demand model to ensure that demand is being met while also ensuring that the city does not have an oversupply of scooters that are not being used.

If in the month prior a provider is getting 2 or more rides on average per day, then a provider should be granted an increase in increments of 500 scooters over the current 2000 cap. If in the month prior, a provider is averaging less than 1 ride on average per day, the city may request that a provider reduce their fleet size. In calculating this ride average, the city should not count scooters that are deployed in Equity Zones because of operational challenges around demand and ridership in those areas.

Bird recently commissioned a report from Charles River Associates (CRA), to study the impact of supply caps on scooter sharing services. The key conclusions are as follows:

1. There is a strong demand for scooter sharing services, across all markets.
2. In cities where e-scooters have been deployed by the thousands, vehicles are used often and ridden regularly.
3. Where scooter fleets were permitted to expand over time, riders have begun riding more often.

Secondly, CRA concluded that supply caps affect cities in the following ways:

1. Consumer benefit. Fewer scooters will mean fewer scooter trips, which in turn means lower mobility, congestion, and environmental benefits for city residents.
2. Equity. Caps will limit benefits to historically underserved areas. When supply is limited, market forces naturally tend to drive operators to provide scooters only in those most profitable neighborhoods. Access will be limited to areas with frequent ridership. When Bird can increase fleet sizes, in partnership with the City, Bird expands our presence across the whole city, helping to diversify transportation choices and improving the reliability of all transportation modes.
3. Unmet potential. Caps prevent e-scooter pilot programs from being properly evaluated because the scale required to realize the full benefits of scooters will never be achieved. To ensure a reliable service, Bird will have to shrink the area of operation.

In cities across the country, e-scooter sharing has already provided an effective complement to public transit, providing people with an accessible, sustainable option. By enabling fleet growth based on utilization, Atlanta will allow scooter providers to determine supply based on demand. Bird is committed to providing a reliable and sustainable complement to public transit, and a replacement for short car trips and cap flexibility is critical to meeting this goal.



## JUMP

Over the past few weeks, demand for JUMP devices has increased significantly. Specifically, our bike rides have increased 31% and scooter rides, 41%, in the last 7 weeks. Additionally, our ridership has also increased (37% for bikes, 39% for scooters). With spring and summer ahead of us, demand will continue to increase, and we'd like to be prepared for the additional demand.

To ensure a reliable experience for JUMP riders, we are writing to request the authority to operate 2,000 scooters and 2,000 bikes in Atlanta. Given that other operators were granted a permit for 2,000 scooters, our bikes and scooters remain at a competitive disadvantage, as the proximity of a device to a rider remains the key determining factor for how people decide which brand to use. Additionally, our data shows that the majority of scooter riders do not make use of bikes, and the majority of bike users do not make use of scooters, further supporting the need for an increase in both the JUMP bike and scooter cap to ensure the service needs of both scooter and bike riders are fully satisfied.

Additionally, according to ITDP's bike sharing planning guide, the ideal ratio of shared bikes per population is between 10 and 30 bikes per 1,000 residents. Based on an approximate population of 500,000, the ideal number of shared bikes for Atlanta is between 5,000 to 15,000 bikes, well above current numbers.

We share the City's goal of enhancing electric and shared mobility options available to residents and visitors. The JUMP team has worked hard to demonstrate our operational excellence and commitment to compliance with the City's Administrative Regulations. We are doubling down on rider education through partnerships with Atlanta Bicycle Coalition and WeCycle, and by placing brand ambassadors at many upcoming events within the city. We are also looking to be a good steward to other organizations in Atlanta for example, we've met with APD, MARTA, Atlantic Station, Ponce City Market, Georgia Tech, ADID, and GWCC to discuss how to best operate in or around their properties, and in many cases, established an effective process to respond to their parking inquiries. Finally, we proactively do multiple daily rounds to prevent parking violations and sidewalk obstructions, and remove vehicles from no-parking zones.

In summary, we thank you for the opportunity to request a cap separation, and we look forward to continuing to work closely with the city to deliver a successful dockless program.

## LIME

Lime commends the City of Atlanta for getting micromobility off to such a strong start by allowing each provider with up to 2,000 devices per operator. Ultimately, Lime maintains that fleet size should be determined by usage metrics instead of regulatory caps for the following reasons:

### Weather

Micromobility utilization increases each year with the arrival of spring and summer. We've already seen strong ridership in the winter months, so if 2,000 vehicles per operator was the right number in February, we will surely need more than 2,000 vehicles per operator in June.

### Operating Costs

Unlike some operators, Lime's business model is heavily focused on in-person, on the ground, full-time staff managing its fleet of scooters. Lime's business needs are not served by having an excessive number of underutilized scooters in the market, which drives up operating costs without increasing revenue. Lime is hyper-committed to identifying the equilibrium in each market that ensures the right amount of vehicles



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for each market. The best way to ensure that equilibrium is met is by having a metrics-based system of issuing permits. Shareable dockless mobility devices are a business of scale. The start up costs of a market include, but are not limited to, a warehouse, local staff, utilities, and cargo vans. These costs do not exponentially increase with larger fleet sizes but are hard costs irrespective of whether there are 2,000 or 200 devices. To meet the City's sustainability and equity goals, local policy must foster an environment that allows operators to thrive.

### Too Many Operators

With no cap on the number of operators in Atlanta and with no clear, data-driven metric for increasing fleet sizes, Atlanta's exposure for a less-than-thriving marketplace increases. In the past, ill-equipped operators have abandoned the Atlanta market, leading to rider confusion and inconsistencies in the market with respect to consumer pricing, consumer expectations, and operator responsiveness. An overabundance of operators with arbitrary caps misserves the operators, the city, and the city's residents.

### Model To Follow

Lime encourages Atlanta to look to the city of Austin, TX which allows operators to increase their fleet size by 250 devices on a monthly basis provided that devices are receiving 3 trips per vehicle per day when averaged on a monthly basis.

## LYFT

Lyft suggests that Atlanta regulate the number of shared mobility devices within its jurisdiction in two ways: (1.) Lyft recommends that Atlanta cap the number of permitted operators; (2.) Lyft recommends that Atlanta enforce the fleet maximum uniformly across all permitted operators.

Lyft has seen that an increased number of operators within a jurisdiction typically leads to increased crowding, rather than increased scooter availability. By allowing a smaller number of operators to deploy larger fleets, those operators will be able to provide better coverage across Atlanta. Moreover, by allowing entities to operate at a greater scale, each will realize operational efficiencies that will allow them to provide more on-ground support for parking and compliance issues. **Our recommendation would therefore be to limit the number of operators but to allow those operators to deploy 3,000-5,000 scooters on the ground each.**

Lyft understands that Atlanta may have reservations about the legality of enforcing market entry restrictions. However, Lyft believes that the City of Atlanta could restrict the number of operators through a competitive permit process, or through increased permit requirements, such as a multi-year operational commitment. This will ensure that Atlanta's dockless program better serves the citizens of Atlanta, while mitigating any concerns related to anticompetitive regulations.

Finally, Lyft suggests that if the City of Atlanta is going to set a uniform fleet size cap for all permitted operators, it should enforce this cap to ensure fair competition among all participants. The City of Atlanta can monitor and/or audit fleet sizes, keeping in mind that the administrative regulations state that "any device impounded and stored by the City of Atlanta will be considered deployed by the Operator and will be counted as one of the Operator's permitted devices." Those operators that violate the fleet size cap should be punished with a fleet size decrease or suspension from the market.

## SPIN

Spin supports the current policy that the city of Atlanta has in place: a maximum fleet size of 2,000 scooters per operator. Our reasoning for this policy is that if a company were allowed to operate with an unlimited number of scooters, they will be less cognizant of how to most effectively deploy their supply of scooters, and instead be motivated to "flood" the city with scooters in order to achieve maximum



market share. With an uncapped fleet allotment, Spin also believes that companies would be less inclined to create strong, local partnerships with community organizations that could benefit from a scooter company's operations throughout every part of the city.

Experience operating in other large metropolitan areas has also shown us that the city of Atlanta may ultimately want to consider capping the number of vendors as well. A competitive RFP or other procurement process with 2-3 awarded vendors may enable the city to better administer a scooter share program that meets the needs of the citizens and visitors of Atlanta in sustainable and environmentally friendly way.

