

## GREATER MANCHESTER TRANSPORT COMMITTEE

Date: Thursday 24 March 2022

Subject: Interim Report on the GM E-scooter Rental Trials and the development of a GM Shared Mobility Strategy

Report of: Nicola Kane, Head of Strategic Planning, Insight and Innovation, TfGM

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### Purpose of Report

To provide an interim report on the GM e-scooter trials and to provide an update on work to develop a shared mobility strategy for Greater Manchester.

### Recommendations:

Members are asked to note and comment on the contents of this report, specifically the:

1. Interim results of the Greater Manchester e-scooter trials.
2. Emerging policy position in respect of e-scooters.
3. The development of the Shared Mobility Strategy.

### Contact Officers

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### Equalities Implications

An EQIA will be produced for any future shared mobility strategy or scheme proposal(s).

### Climate Change Impact Assessment and Mitigation Measures

A Climate Change Impact Assessment and Mitigation Measures will be produced for any future shared mobility strategy or scheme proposal(s).

### Risk Management

Not applicable

## **Legal Considerations**

Not applicable

## **Financial Consequences – Revenue**

Not applicable

## **Financial Consequences – Capital**

Not applicable

## **Number of attachments to the report: 0**

## **Comments/recommendations from Overview & Scrutiny Committee**

Not applicable

## **Background Papers**

Two documents are considered particularly pertinent to this report, both have been referred to in the main body of the report:

- The Future of e-scooters. What powers do cities need and what standards should be set, February 2022, Urban Transport Group<sup>1</sup>.
- E-scooters in Greater Manchester: second interim report, January 2022, University of Salford<sup>2</sup>.

## **Tracking/ Process**

Does this report relate to a major strategic decision, as set out in the GMCA Constitution?

No

## **Exemption from call in**

Are there any aspects in this report which means it should be considered to be exempt from call in by the relevant Scrutiny Committee on the grounds of urgency?

No

## **GM Transport Committee**

24/03/22

## **Overview and Scrutiny Committee**

Not applicable

# 1. INTRODUCTION

- 1.1. Shared or rental e-scooters are part of the rapidly expanding shared mobility industry<sup>3</sup>, providing new potential opportunities to reduce carbon emissions, improve air quality and reduce congestion; whilst improving mobility, reducing societal inequalities, and supporting economic growth.
- 1.2. Currently in the UK private e-scooters are illegal but shared e-scooter schemes are being operated across England as part of a Department of Transport led trial which started in July 2020 and is due to finish in November 2022<sup>4</sup>. In Greater Manchester two trials are currently being conducted in Salford and Rochdale. Trials are led by the local authorities in partnership with TfGM.
- 1.3. The aim of the trials is to inform future legislation through the gathering of insights about the safety, benefits, public perceptions, and wider impacts of e-scooters. There is also the opportunity to consider how any future rental scheme could operate and be rolled out more widely in different parts of GM.
- 1.4. A GM policy position on e-scooters is also being prepared in anticipation of them being legalised in the near future. This policy position will draw on international best practice; as well as learning from local and national evaluation of the ongoing DfT-led e-scooter rental scheme trials (including those in Salford and Rochdale). It is intended that this position will ultimately be reflected in a broader “Shared Mobility Strategy” (a sub-strategy of the GM Transport Strategy 2040) to be developed during 2022.

## 2. DEVELOPMENT OF E-SCOOTER POLICY POSITION

2.1. E-Scooters have the potential to contribute to a number of strategic objectives, including Clean Air, 2038 Carbon Neutral Target, levelling up and the four goals of the `Greater Manchester Transport Strategy 2040:

- **Protecting our Environment:**

- Shared e-scooters have the potential to be used in conjunction with public transport, with the University of Salford reporting that 53% of respondents to their survey would use e-scooters in combination with public transport<sup>5</sup>. This indicates that there is the potential for them to provide a first/last mile solution, although there is still uncertainty about whether e-scooters have a net positive or negative effect on public transport usage.

- Shared e-scooters can reduce the number of cars on the road. The University of Salford have found evidence that shared e-scooters do replace car journeys, they report that 14% of rental e-scooter trips in Salford have replaced journeys that would have otherwise been made by private car and 16% of trips replaced taxis or ride-hailing services<sup>6</sup>.
- **Improving quality of life for all:**
  - Reduce transport related social exclusion and promote social mobility by providing access to alternative, sustainable modes of transport.
  - Reduce financial stress induced by car ownership.
- **Supporting sustainable economic growth:**
  - Potential to reduce congestion on our roads by replacing short car trips and to improve access to local shops, jobs and services.
- **Developing an innovative city-region:**
  - An expanded shared mobility eco-system could allow innovative fares products to be developed (e.g. subscription-based products); and
  - increased use of shared mobility and associated infrastructure may increase the feasibility of other new modes and services e.g. shared use e-moped, co-working office spaces, parcel lockers etc.

2.2. However, shared and private e-scooters will present opportunities and challenges which must be exploited and mitigated respectively to maximise alignment with Greater Manchester's strategic objectives:

- **Opportunity:** e-scooters to be used as for part of multi-modal journeys. To exploit this opportunity, it may be necessary to provide storage/docking facilities for e-scooters at public transport stops and interchanges. Such improvements would also benefit cyclists and users of other micro-mobility modes, although further research is required on where the most appropriate space is for e-scooters to be ridden.
- **Risk/Issue:** Commercial shared mobility operators' preference to operate in the more profitable, high-density urban centres. To mitigate against this there may be a need to include levers in any contract to ensure that all communities of Greater Manchester benefit from shared mobility.

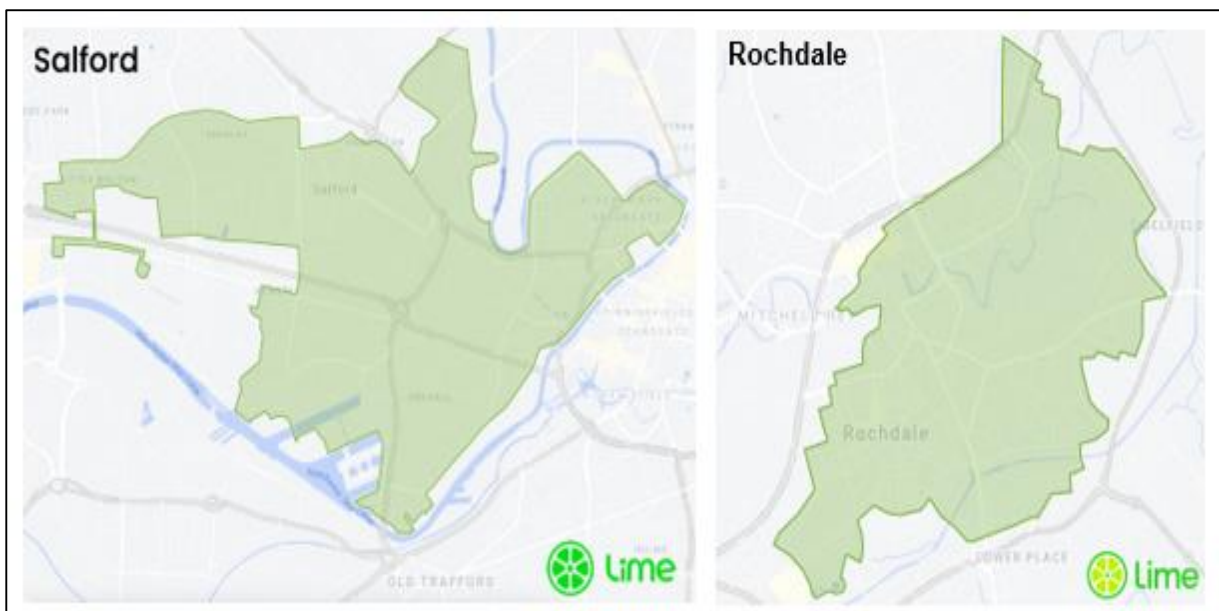
2.3. The e-scooter policy position will be developed over the coming months and included in the new GM Shared Mobility Strategy for adoption later in 2022.

### 3. E-SCOOTER TRIALS

3.1. In July 2020, the Department for Transport amended existing regulations to enable e-scooter trials to take place. This process was fast tracked “To support a ‘green’ restart of local travel and help mitigate reduced public transport capacity...”.<sup>7</sup>

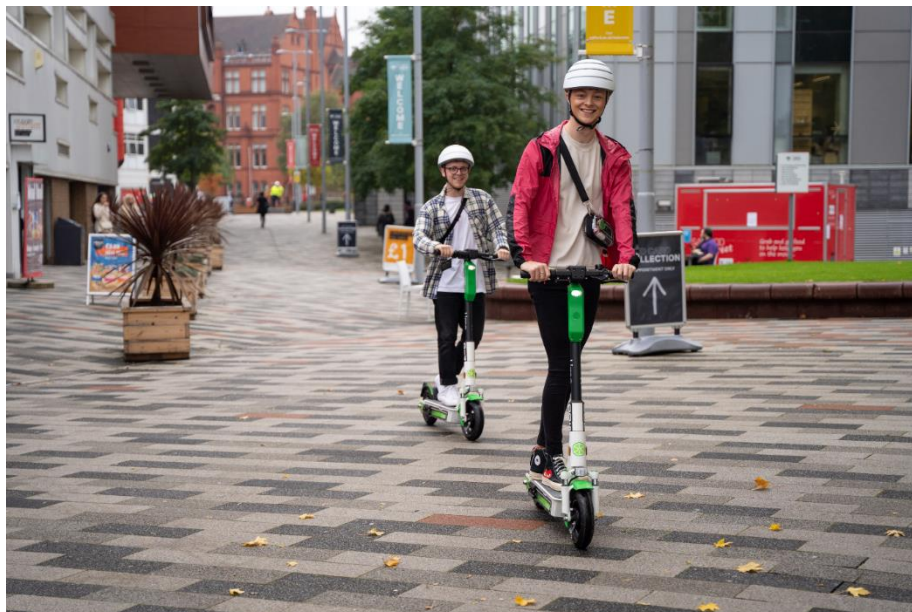
3.2. E-scooter trials have been operational in Salford and Rochdale since October 2020 and April 2021 respectively. The number of operational e-scooters varies according to demand, with fleet sizes being increased during summer months when demand increases. Currently there are approximately 210 e-scooters provided within the Salford scheme while the Rochdale scheme has approximately 20. The e-scooters are operated by a private company called “Lime”. The scheme boundaries are shown in Figure 1.

**Figure 1: Boundaries of e-scooter hire schemes in Salford and Rochdale**



Source: [E-scooters in Greater Manchester: Second Interim Report \(salford.ac.uk\)](https://www.salford.ac.uk/research/transport/e-scooters-in-greater-manchester-second-interim-report)

**Figure 2: E-Scooter riders in Salford**



3.3. No Road Traffic Incidents (RTI) involving e-scooters from the hire schemes resulting in serious injuries or fatalities have been recorded. One RTI which resulted in a slight injury was recorded in Salford.

3.4. To date, there have been a total of 240,000 trips made across the two trial areas covering a total distance of 394,000km. Due to the difference in trial area size, topography and population density the usage figures in the two areas do differ. In Salford, the average number of trips per day is 599 and the average trip distance is 1.53km. In comparison, the average number of trips in Rochdale per day is 6 and the average trip distance is 1.2km.

3.5. The University of Salford was commissioned to undertake monitoring and evaluation of the Salford scheme. Two interim reports have been produced to-date, with the final report due in June 2022. Key findings from the latest interim report, which was published in January 2022, include:

- Trips undertaken by e-scooter primarily replace those that would previously been undertaken by walking.
- However, a significant minority of trips undertaken by e-scooter replace those that would previously have been undertaken by private car or taxi. The research also indicates that the *potential* for e-scooters to replace short car-based journeys is significant.
- The research indicates that the potential for e-scooters to be used as part of multi-modal journeys, which include public transport, are also significant.

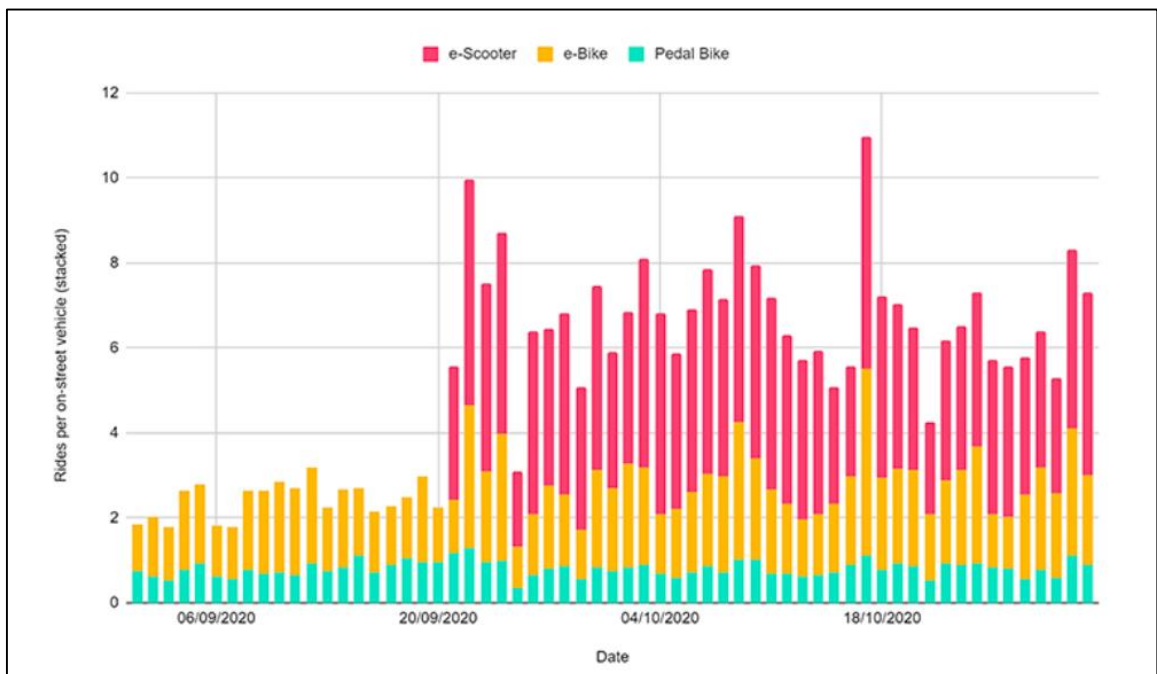
3.6. The interaction of GM Cycle Hire and the e-scooter hire schemes has not been empirically assessed. However, when more travel data is available for both modes this interaction will be studied as it is important that any future e-scooter roll-out complements our cycle hire scheme.

3.7. The potential interaction of e-scooter hire schemes with other shared mobility services is difficult to predict, however, evidence from elsewhere suggests that e-scooters and cycle hire are unlikely to abstract trips from each other, and they are complementary rather than competing modes of transport. This is because:

- e-scooter users tend to be younger than bike hire users.
- A higher proportion of e-scooters trips are for leisure compared to bike hire.
- Journey distance tends to be shorter for e-scooters.

3.8. The chart in Figure 3 shows Beryl’s usership in Norwich, introduction of e-scooters did not appear to negatively impact bike hire. Clearly, it is not possible to understand how the uptake of bike hire would have changed if e-scooters were not introduced.

**Figure 3: Comparison of shared-use micro-mobility usage in Norwich, UK**



Source: [Micro-mobility: The unexpected player in delivering modal shift? \(intelligenttransport.com\)](https://www.intelligenttransport.com/news/2020/09/20/micro-mobility-the-unexpected-player-in-delivering-modal-shift/)

3.9. To ensure that Greater Manchester is well positioned should e-scooter hire schemes be legalised the next steps are identified as:

- Continue to monitor/research e-scooter hire schemes and identify best practice. The final University of Salford report is due in June '22.
- Continue to engage with key internal/external stakeholders (e.g. Local Authorities, RNIB etc) to understand different perspectives.
- Development of strategy and policy, with particular consideration of how different micro-mobility can complement each other and public transport services.

## **4. PRIVATE USE E-SCOOTERS**

- 4.1. Private use e-scooters can only be legally used on private land with the landowner's permission. Their use elsewhere is illegal.
- 4.2. At this stage, it is considered prudent for TfGM and local highway authorities to anticipate what any changes in legislation are likely to mean for Greater Manchester and develop plans to exploit opportunities and mitigate issues and risks accordingly.
- 4.3. TfGM broadly supports the Urban Transport Group's position on e-scooters which calls for the Department for Transport to stipulate rigorous construction and technical standards, and national minimum requirements to be implemented. The latter may include requirements such as specifying when and where e-scooters can be used on public land, vehicle registration etc.

## **5. DEVELOPMENT OF SHARED MOBILITY STRATEGY & ROADMAP**

- 5.1. TfGM and the ten GM local authorities are currently developing a Shared Mobility Strategy, which will form a sub-strategy of the Greater Manchester Transport Strategy 2040.
- 5.2. The draft vision statement for the Shared Mobility Strategy is "*To bring about an increase in Shared Mobility provision across Greater Manchester, in order to widen travel choices and link more people with more places, thereby helping to decarbonise the transport system in GM*".
- 5.3. The Shared Mobility Roadmap will identify opportunities to deliver interventions which align with the Objectives and Network Principles of the Greater Manchester Transport Strategy 2040.



5.4. It is anticipated that the Shared Mobility Strategy & Delivery Roadmap will be developed for adoption later in 2022, with further engagement with Members and other key stakeholders over the coming weeks.

**Nicola Kane**

**Head of Strategic Planning, Insight and Innovation**

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<sup>1</sup> <https://www.urbantransportgroup.org/system/files/general-docs/The%20future%20of%20e-scooters%20final.pdf>

<sup>2</sup> [E-scooters in Greater Manchester: Second Interim Report \(salford.ac.uk\)](#)

<sup>3</sup> [https://assets.ey.com/content/dam/ey-sites/ey-com/en\\_gl/topics/automotive-and-transportation/automotive-transportation-pdfs/ey-micromobility-moving-cities-into-a-sustainable-future.pdf](https://assets.ey.com/content/dam/ey-sites/ey-com/en_gl/topics/automotive-and-transportation/automotive-transportation-pdfs/ey-micromobility-moving-cities-into-a-sustainable-future.pdf)

<sup>4</sup> <https://www.gov.uk/government/publications/e-scooter-trials-guidance-for-local-areas-and-rental-operators/e-scooter-trials-guidance-for-local-areas-and-rental-operators>

<sup>5</sup> [E-scooters in Greater Manchester: Second Interim Report \(salford.ac.uk\)](#)

<sup>6</sup> <http://usir.salford.ac.uk/id/eprint/60393/>

<sup>7</sup> <https://www.gov.uk/government/publications/e-scooter-trials-guidance-for-local-areas-and-rental-operators/e-scooter-trials-guidance-for-local-areas-and-rental-operators>