

# Attachment 4: Views of Toronto residents on e-scooters (Summary Report)

IE14.10

Toronto E-Scooter | Summary | Confidential

Conducted by Nanos for the City of Toronto, February 2020  
Submission 2020-1561






This study was commissioned by the City of Toronto and the research was conducted by Nanos Research.

This report summarizes the observations based on an online non-probability panel survey of 1,010 Toronto residents, 16 years or older, between January 23<sup>rd</sup> and February 1<sup>st</sup>, 2020.

**Sampling plan:** To achieve the best representation, the sample was structured to the natural geographic distribution of Toronto based on the Statistics Canada 2016 Census of Population.




Half of Toronto residents say they have seen an e-scooter being operated

Dangerous and fun/adventure are top of mind words when Toronto residents think about e-scooters

## Awareness and Attitudes Towards E-Scooters

While one in two Toronto residents report having seen e-scooters being operated, less than one in ten report having used or rented one. Younger residents were more likely to report having seen e-scooters being operated and were also more likely to report having used an e-scooter than older residents.

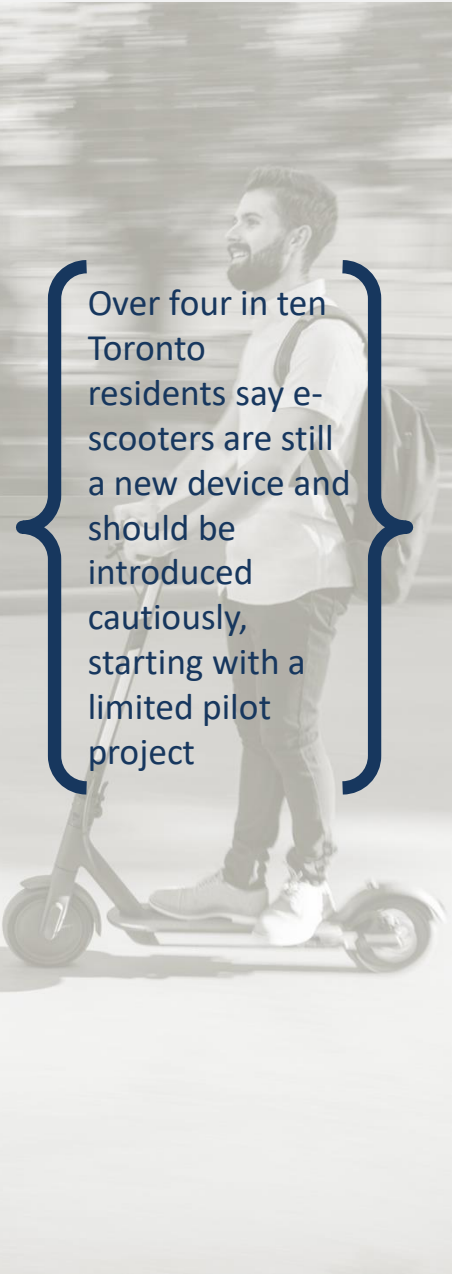
- **Dangerous and fun/adventure are top of mind words when Toronto residents think about e-scooters** – Asked what words come to mind when they think of an e-scooter, Toronto residents most frequently say dangerous and fun/adventure (16% each), followed by easy/convenient/useful (13%), quick/speed (12%), and kid/toy (nine per cent). Toronto residents who are 55 years old or older (27%) are six times more likely to use the word, "dangerous", to describe e-scooters than younger residents (five per cent of those 16 to 34 years old).
- **Toronto residents most frequently have heard about e-scooters through seeing them being operated or through the News, TV, Twitter or other media** – Asked where they have heard about e-scooters, Toronto residents most frequently say they had seen e-scooters being operated (50%) and through News, TV, Twitter and other media (46%), followed by word of mouth (26%), online shopping and retailer websites (19%), and having used or rented one (eight per cent). Fourteen per cent say they had never heard about them until this survey.
- **Older residents are twice as likely to say they have never heard of e-scooters than younger residents** – Nearly one in two Toronto residents who are 55 years old or older say they had not heard about e-scooters until this survey (18%) compared to under one in ten (nine per cent) of 16 to 34 year olds. Toronto residents who are 16 to 34 years old are more likely to say they have seen e-scooters being operated than older Toronto residents (55%, compared to 45% of those 55 and older). Younger Toronto residents are also more likely to report having used or rented an e-scooter (16% of 16-34 year olds, compared to three per cent of those 55 and older).



Toronto residents who have used an e-scooter say “fun” is the description that best matches their experience

Those who have seen an e-scooter being operated most frequently say that they observed young people operating them

- **Less than one in ten Toronto residents say they have used and/or rented an e-scooter** – Eight per cent of Toronto residents say they have used and/or rented an e-scooter. Of these, Toronto residents who are 16 to 34 years old (16%) are five times more likely to report having used or rented an e-scooter than those age 55 and older (three per cent), and nearly three times more likely than those aged 35 to 54 years old (six per cent).
- **Those who have seen an e-scooter being operated most frequently say that they observed young people operating them** – Asked to rank their top three observations when they saw people operating e-scooters, Toronto residents most frequently rank first that they saw mostly young people riding them (29%), followed by people having fun or riding e-scooters for convenience (18%), few people using them (13%), and people riding safely, not speeding, using bike lanes/roadway on e-scooters (13%). Ten per cent first rank that they saw people riding recklessly, speeding, not yielding to pedestrians on e-scooters.
- **Those who have used an e-scooter are marginally more likely to say they used a rented e-scooter rather than a privately owned e-scooter** – Just over one in two Toronto residents (54%) who have ridden an e-scooter say they used a rented e-scooter to do so, while just under one in two (47%) say they used a privately owned e-scooter.
- **Fun and convenience best describe Toronto resident’s experiences when riding an e-scooter** – Asked to rank the top three descriptions that best match their experience when riding an e-scooter, Toronto residents who have used or rented an e-scooter most frequently rank first that it was fun (26%) and that it was convenient (25%), followed by “I would use it but not everyone should use it as it takes some skill” (19%), it was cost effective (16%), it was expensive (seven per cent), and they had a near miss with other e-scooter riders, pedestrians, cyclists or drivers (four per cent).




Over four in ten Toronto residents say e-scooters are still a new device and should be introduced cautiously, starting with a limited pilot project

## E-scooter pilot projects

When it comes to how the City of Toronto should participate in the Province's e-scooter pilot project, Toronto residents most frequently say e-scooters are still a new device and should be introduced cautiously, starting with a limited pilot project. **Safety and education** are most frequently seen as the priorities the City should consider when developing its approach to e-scooters. Respondents were asked for their views before and after reading a set of statements about e-scooters. Overall, results pre and post-information were consistent.

- **Toronto residents most frequently say that e-scooters are still a new device and should be introduced cautiously, starting with a limited pilot project** – Asked how the City of Toronto should participate in the Province's e-scooter pilot project, if at all, Toronto residents most frequently say that e-scooters are still a new device and should be introduced cautiously, starting with a limited pilot project (44% pre-information, 52% post-information), followed by e-scooters are fun, convenient and should be allowed like bicycles and e-bikes (27% pre-information, 22% post-information), e-scooters are a fad and the City should improve other transportation options (14% pre-information, 11% post-information) and e-scooters are dangerous and should not be piloted at this time (nine per cent pre-information, 10% post-information).
- **Toronto residents most frequently say the most important role e-scooters could fulfil in Toronto's transportation system is being used for fun or recreation**– Asked to rank the top three roles they think e-scooters could fulfil in Toronto's transportation system, Toronto residents most frequently ranked using them for fun or recreation (20% pre-information, 15% post-information) first, followed by using them instead of walking or short transit trips (18% pre-information, 19% post-information), a way for tourists and others to see the city (13% pre-information, 12% post-information), using them where public transit service is less frequent or not available (12% pre-information, 16% post-information), an alternative to driving (10% pre-information, 11% post-information) and using them to commute to/from work (nine per cent pre-information and post-information). Fourteen per cent say e-scooters do not fulfill a real role in Toronto's transportation system and five per cent are unsure both pre-information and post-information.



Nearly three in ten Toronto residents say Toronto should focus on safety to prevent serious injuries and death when developing its approach to e-scooters

- **Older residents are more likely to say that e-scooters do not fulfill a real role in Toronto’s transportation system compared to younger residents** – Just under two in ten (19%) older residents (55 and older) say that e-scooters do not fulfill a real role in Toronto’s transportation system compared to nine per cent of residents aged 16 to 34 years old.

## Priorities for the City’s e-scooter approach

- **Residents says safety is the most important priority for the City of Toronto to prioritize when developing its approach to e-scooters** – Asked to rank the top three things the City of Toronto should prioritize in developing its approach to e-scooters, Toronto residents rank first focusing on safety to prevent serious injuries and death (28% pre-information, 26% post-information), followed by educating new users of e-scooters to learn how to operate them (20% pre-information and post-information), protecting pedestrians and persons with disabilities from e-scooters being used on sidewalks (17% pre-information, 22% post-information), restricting the use of e-scooters in Toronto (12% pre-information, nine per cent post information), building more infrastructure for e-scooters and other similar uses (11% pre-information and post-information). Seven per cent rank being open and more permissive to dockless e-scooters first (five per cent post-information), and six per cent say the City should ban/not allow e-scooters both pre-information and post-information.
- **Toronto residents most frequently say the City should prioritize injuries and fatalities compared to other modes when evaluating an e-scooter pilot** – Asked what the City of Toronto should prioritize when evaluating an e-scooter pilot if it were to allow e-scooters on public streets, Toronto residents most frequently ranked injuries and fatalities compared with other modes (31%) first, followed by impacts on all road users and the transportation system (25%), costs to the city for enforcement, dealing with litter/complaints, lawsuits, claims and staffing (15%), the environmental impacts like the lifecycle of e-scooters (11%), the number of trips taken and shifts in transportation mode used (10%), and social equity and demographics of users (eight per cent).

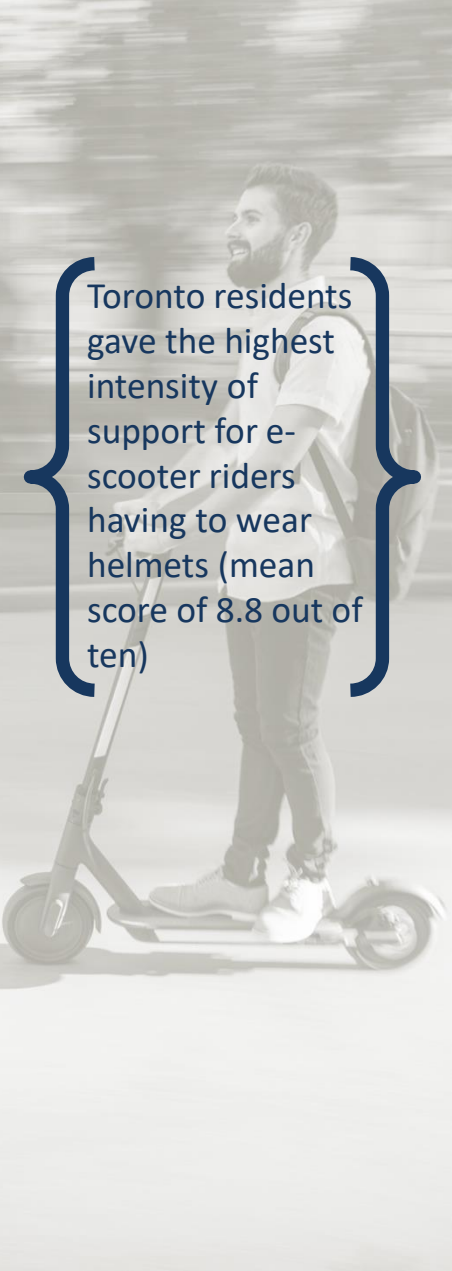


Younger residents are more comfortable recommending that a loved one use an e-scooter compared to older residents

## Perception of e-scooters

Over half of Toronto residents say they would feel comfortable or somewhat comfortable recommending that a loved one use an e-scooter, with younger residents feeling most comfortable. Toronto residents are more likely to say that using e-scooters is generally safe or somewhat safe than to say it is not safe or somewhat not safe, with younger respondents most likely to say that they are generally safe or somewhat safe. Results pre and post-information were consistent.

- **Over half of Toronto residents say they would be comfortable or somewhat comfortable recommending that a loved one use an e-scooter** – Over one in two say they would be comfortable (19% pre-information, 17% post-information) or somewhat comfortable (36% pre-information, 37% post-information) recommending that a loved one use an e-scooter as a mode of transportation in Toronto if the City of Toronto were to allow e-scooters where bikes are allowed on roadways and bike lanes, while four in ten say they would be somewhat not comfortable (18% pre-information, 20% post-information) or not comfortable (21% pre-information and post-information). Six per cent are unsure.
- **Younger Toronto residents are more likely to say they would be comfortable recommending that a loved one use an e-scooter than older residents** – Three in ten (30%) Toronto residents 55 years old or older say they would not be comfortable recommending that a loved one use an e-scooter as a mode of transportation in Toronto, compared to 18 per cent of 35 to 54 year olds and 13 per cent of 16 to 34 year olds.



Toronto residents gave the highest intensity of support for e-scooter riders having to wear helmets (mean score of 8.8 out of ten)

- **Toronto residents are most likely to say that using e-scooters is generally safe or somewhat safe**  
– Over half of Toronto residents say that using e-scooters is generally safe (11% pre-information, 10% post-information) or somewhat safe (44% pre-information, 42% post-information), while just over one in three say that it is generally somewhat not safe (21% pre-information, 24% post-information) or not safe (15% pre-information, 17% post-information). Nine per cent are unsure.
- **Younger Toronto residents and men are more likely to say that using e-scooters is generally safe**  
– Just over seven in ten 16 to 34 year olds say that using e-scooter is generally safe (19%) or somewhat safe (52%), compared to under six in ten 35 to 54 year olds (13% safe, 46% somewhat safe) and just over four in ten 55 year olds and older (five per cent safe, 38% somewhat safe). Men (16% safe, 46% somewhat safe) are more likely to say that using e-scooters is generally safe compared to women (eight per cent safe, 43% somewhat safe).

## Support for e-scooter initiatives

Toronto residents gave the highest intensity of support for the initiative that would require e-scooter riders to wear helmets and the lowest intensity of support for the initiative that would ban e-scooters in Toronto.

- **E-scooter riders having to wear helmets received the highest intensity of support from Toronto residents** – Asked to rate a series of e-scooter initiatives on a scale from 1 to 10, with 1 being least supportive to 10 being highly supportive, Toronto residents gave the highest mean score to e-scooter riders having to wear helmets (mean of 8.8 out of 10), followed by having e-scooter rentals at Toronto Bike Share stations (mean of 7.0 out of 10) and having e-scooter rentals at public transit stations/stops (mean of 6.9 out of 10). Focusing a pilot downtown or in suburban areas received lower support (mean of 6.2 and 6.3, respectively), while not allowing e-scooters in Toronto like New York city's Manhattan received the lowest support (mean of 5.4 out of 10).






- **Older Toronto residents were more likely to support initiatives that would ban e-scooters in Toronto; younger Toronto residents were more likely to support having e-scooter rentals at public transit and Bikeshare stations** – Older respondents (55 plus) were more likely to support the initiative that would not allow e-scooters in Toronto than younger respondents (mean of 6.0 out of 10 for those 55 plus compared to 4.7 for those 16 to 34 years old), and were also more likely to support the initiative that would require e-scooter riders to wear helmets (mean of 9.3 out of 10 for those 55 plus compared to 8.2 for those 16 to 34 years old). Younger Toronto residents were more likely to support having e-scooter rentals at public transit stations/stops and at Bikeshare stations (mean or 7.3 and 7.4 out of 10 respectively for those 16 to 34 years old, compared to a mean of 6.6 out of 10, each, for those 55 and older).

# E-scooter image and definition displayed to respondents



An e-scooter is a two-wheeled device the rider stands on, holding a handlebar, see picture. It has a battery and can travel at a speed of 24 km/hour using a throttle.



**“ Half of Toronto residents report having seen an e-scooter being operated, under one in ten report having used one themselves**

**”**

# Words that come to mind when thinking of e-scooters

Top mentions	Frequency (n=1004)
Dangerous	16.3%
Fun/adventure	15.8%
Easy/Convenient/useful	13.4%
Quick/speed	11.7%
Kid/toy	8.8%
Cool	7.3%
Electric	6.6%
Environmentally friendly	6.5%

**QUESTION** – What words come to mind when you think of an e-scooter? [OPEN]

# Hearing of e-scooters

	All (n=1010)	Scarborough (n=258)	North York (n=235)	Etobicoke /York (n=177)	Toronto/ East York (n=340)	Male (n=470)	Female (n=529)	18 to 34 (n=351)	35 to 54 (n=376)	55 plus (n=286)
I have seen e-scooters being operated	49.6%	42.6%	43.1%	50.8%	58.8%	55.0%	44.9%	54.7%	51.3%	44.9%
News, TV, Twitter, or other media	46.3%	42.6%	50.6%	41.3%	49.2%	48.2%	44.6%	46.5%	37.9%	51.1%
Word of mouth through friends/other	25.9%	20.4%	24.8%	25.5%	31.1%	27.4%	24.6%	35.0%	29.8%	16.8%
Online shopping and retailer websites	19.4%	21.4%	17.8%	16.3%	21.1%	23.8%	15.4%	28.7%	20.7%	11.6%
I have used and/or rented an e-scooter	7.6%	4.1%	8.9%	7.3%	9.4%	8.1%	7.2%	15.6%	5.7%	2.8%
None of the above – I have not heard about them until this survey	14.0%	19.9%	13.7%	16.7%	8.1%	10.2%	17.4%	9.3%	13.7%	17.8%

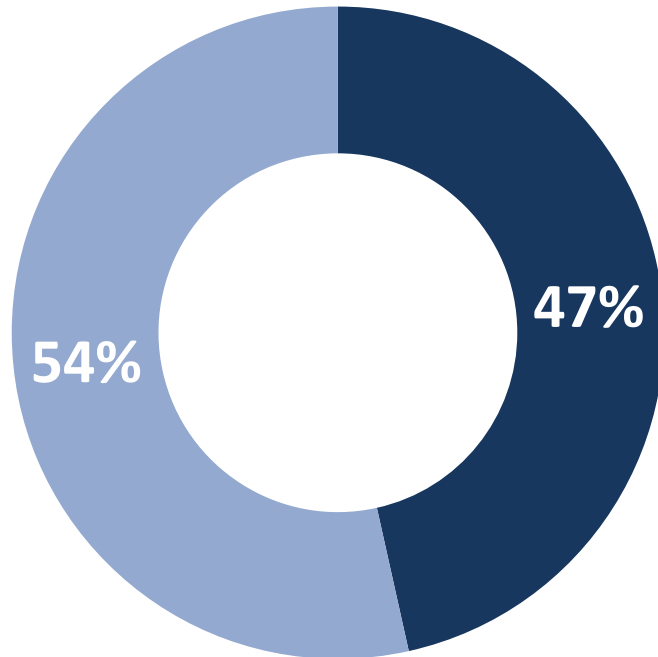
**QUESTION** – Where have you heard about e-scooters? Please select all that apply. [RANDOMIZE]

# People using e-scooters

Top mentions	Rank 1 (n=532)	Rank 2 (n=532)	Rank 3 (n=532)
Mostly young people riding e-scooters	28.7%	19.3%	16.0%
People having fun or riding e-scooters for convenience	18.3%	21.2%	23.3%
Few people using e-scooters	13.3%	15.0%	16.0%
People riding safely, not speeding, using bike lanes/roadway on e-scooters	12.6%	14.8%	12.4%
People riding recklessly, speeding, not yielding to pedestrians on e-scooters	9.6%	10.0%	9.8%
E-scooters blocking sidewalk or trip hazards	7.9%	9.8%	8.9%
People of all ages riding e-scooters	7.1%	5.9%	7.7%
Someone falling, injured, or near miss/collision from e-scooters	2.6%	3.6%	5.6%

**QUESTION** – [ASK ONLY IF ANSWERED RESPONSE 4 “I have seen e-scooters being operated” or 5 “I have used and/or rented an e-scooter” IN Q5] When you saw people using an e-scooter, what did you see? Please rank your top three observations. [RANDOMIZE]

# Renting versus owning an e-scooter



■ Using a privately owned e-scooter ■ Using a rented dockless e-scooter

	Using a privately owned e-scooter	Using a rented dockless e-scooter
Scarborough (n=12)*		
North York (n=22)*		
Etobicoke/York (n=16)*		
Toronto/East York (n=34)	51.4%	48.6%
Male (n=41)	50.2%	49.8%
Female (n=42)	41.5%	58.5%
16 to 34 (n=54)	47.5%	52.5%
35 to 54 (n=22)*		
55 plus (n=8)*		

\*Weighted to the true population proportion.  
 \*Charts may not add up to 100 due to rounding.  
 \*Shaded due to small sample size.

**QUESTION** – [ASK ONLY IF SELECTED 5 “I HAVE USED AND/OR RENTED AN E-SCOOTER IN Q5] When riding/operating an e-scooter, were you mostly using a privately owned e-scooter or a rented e-scooter?

# Describing e-scooter experience

	Rank 1 (n=84)	Rank 2 (n=84)	Rank 3 (n=84)
It was fun riding e-scooters	25.5%	35.8%	23.1%
It was convenient to use the e-scooter	25.3%	22.6%	18.6%
I would use it but not everyone should use it because it takes some skill	19.0%	10.3%	14.1%
It was cost effective	15.9%	15.1%	18.7%
It was expensive	6.8%	5.3%	5.2%
I had a near miss with other e-scooter riders, or pedestrians or cyclists or drivers	4.4%	3.0%	6.2%
I would not use an e-scooter again	-	3.9%	8.0%
The e-scooter was defective/had faulty braking/loose parts etc.	-	0.9%	1.8%
I fell or had an injury when using the e-scooter	-	1.9%	2.0%
Other	3.0%	1.2%	2.4%

**QUESTION** – [ASK ONLY IF SELECTED “I HAVE USED AND/OR RENTED AN E-SCOOTER IN Q5] Please rank the top three descriptions that best match your experience when riding an e-scooter where 1 describes your experience most, 2 second most and 3 third most. [RANDOMIZE]





“

*Pre-information, 44 per cent of Toronto residents say that e-scooters are still a new device and should be introduced cautiously, starting with a limited pilot project - this changes to 52 per cent post information*

”

# City of Toronto participating in the e-scooter pilot project – Pre-information

Top mentions	Frequency (n=1010)
E-scooters are still a new device and should be introduced cautiously, starting with a limited pilot project	43.6%
E-scooters are fun, convenient and should be allowed like bicycles and e-bikes.	27.1%
E-scooters are a fad and the city should improve other transportation options.	13.9%
E-scooters are dangerous and should not be piloted at this time.	8.7%

**QUESTION** – The Government of Ontario has given cities the option to test e-scooters on public roads, trails, parks and sidewalks. What are your initial thoughts on how the City of Toronto should participate in the Province's e-scooter pilot project, if at all? Please select the one answer that best reflects your perspective at this time. [RANDOMIZE] [SINGLE SELECT]

# Potential roles for e-scooters in Toronto's transportation system – Pre-information


	Rank 1 (n=1010)	Rank 2 (n=1010)	Rank 3 (n=1010)
Used for fun or recreation	20.0%	22.0%	20.4%
Used instead of walking or short transit trips	17.8%	19.8%	19.7%
Does not fulfil a real role in Toronto's transportation system	13.5%	8.5%	8.6%
A way for tourists and others to see the city	13.1%	11.5%	12.9%
Used where public transit service is less frequent or not available	12.4%	13.6%	14.2%
An alternative to driving	9.5%	10.2%	10.3%
Used to commute to/from work	8.9%	11.2%	5.7%
Unsure	4.9%	3.1%	8.1%

**QUESTION** – Please rank the top three roles you think e-scooters could fulfil in Toronto's transportation system where 1 is the most important, 2 is the second most important and 3 is the third most important.  
[RANDOMIZE]

# Priorities for the City in developing its e-scooter approach – Pre-information

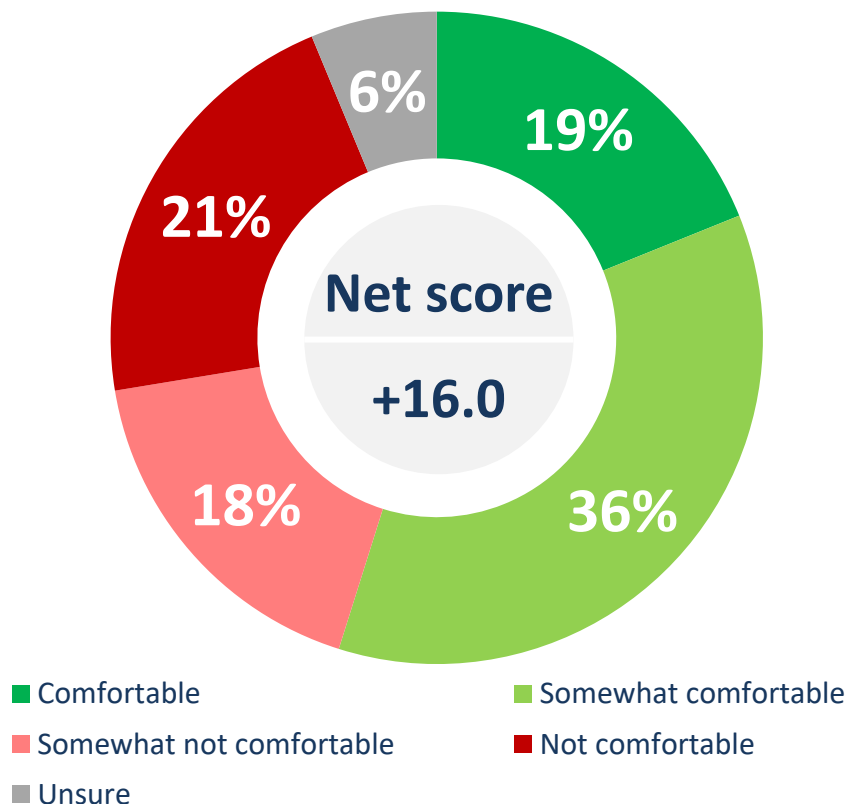
	Rank 1 (n=1010)	Rank 2 (n=1010)	Rank 3 (n=1010)
Focus on safety to prevent serious injuries and deaths	28.4%	24.3%	22.5%
Educate new users of e-scooters to learn how to operate them	19.5%	22.1%	18.1%
Protect pedestrians and persons with disabilities from e-scooters being used on sidewalks	16.6%	21.0%	21.6%
Restrict use of e-scooters in Toronto (where parked/where riding)	11.8%	13.3%	13.9%
Build more infrastructure for e-scooters and other similar uses	11.0%	9.6%	13.0%
Be open and more permissive to dockless e-scooters (parked anywhere)	7.0%	6.5%	6.4%
Ban/not allow e-scooters	5.7%	3.1%	4.5%

**QUESTION – QUESTION** – What are the things that the City of Toronto should prioritize in developing its approach to e-scooters? Please rank the top three priorities where 1 is the most important, 2 is the second most important and 3 is the third most important. [RANDOMIZE]



**“ Over half of Toronto residents say they would feel comfortable or somewhat comfortable recommending that a loved one use an e-scooter ”**

# Comfort recommending using an e-scooter – Pre-information

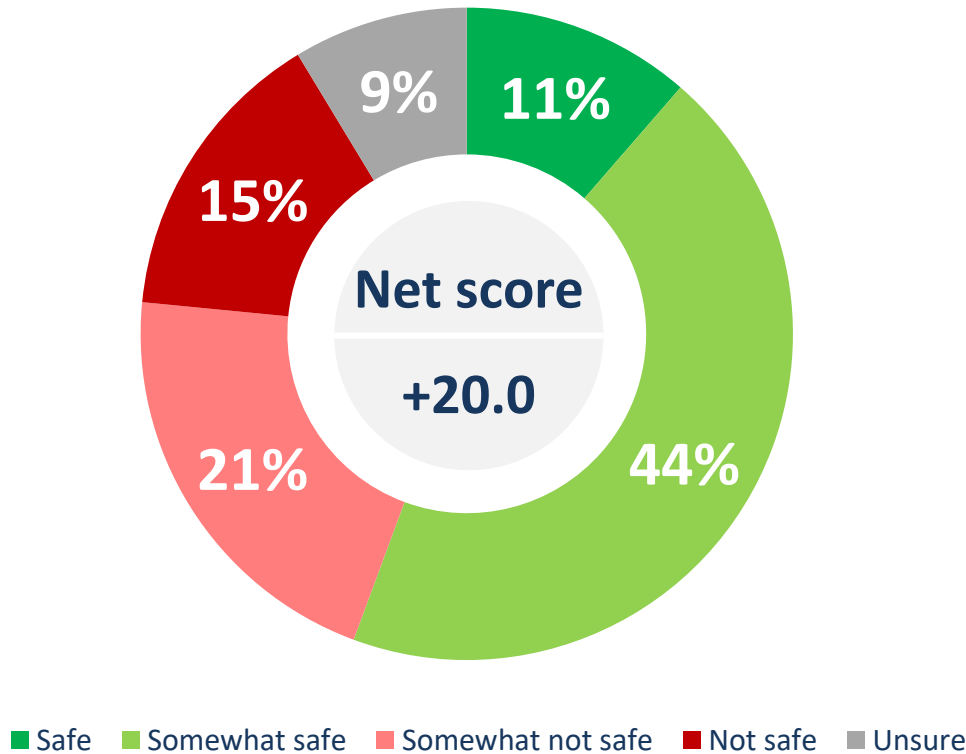


	Comfortable/ somewhat comfortable
Scarborough (n=258)	51.8%
North York (n=235)	49.2%
Etobicoke/York (n=177)	57.7%
Toronto/East York (n=340)	59.3%
Male (n=470)	61.0%
Female (n=529)	49.7%
16 to 34 (n=351)	67.2%
35 to 54 (n=376)	57.0%
55 plus (n=283)	44.4%

\*Weighted to the true population proportion.  
\*Charts may not add up to 100 due to rounding.

**QUESTION** – If the City of Toronto were to allow e-scooters where bikes are allowed on roadways and bike lanes, would you be comfortable, somewhat comfortable, somewhat not comfortable or not comfortable recommending that a loved one use an e-scooter as a mode of transportation in Toronto?

# Safety using an e-scooter – Pre-information



	Safe/ somewhat safe
Scarborough (n=258)	56.2%
North York (n=235)	52.3%
Etobicoke/York (n=177)	55.9%
Toronto/East York (n=340)	57.6%
Male (n=470)	61.5%
Female (n=529)	50.9%
16 to 34 (n=351)	70.6%
35 to 54 (n=376)	58.1%
55 plus (n=283)	43.0%

\*Weighted to the true population proportion.  
 \*Charts may not add up to 100 due to rounding.

**QUESTION** – Would you say that using e-scooters is generally safe, somewhat safe, somewhat not safe or not safe?

“

*Views on e-scooter pilot projects and City priorities remained consistent after respondents read several informative statements about e-scooters*

”



**Here is some information about e-scooters and experiences of different cities. [RANDOMIZE INFORMATION]**

Info 1:

In Paris, 7% of dockless e-scooter users rented an e-scooter almost every day, and 38% at least once a week. About 68% said it was a pleasant and fun way to travel, and saved them time.

Info 2:

Paris and Singapore banned e-scooters from being used on sidewalks. This is after pedestrian deaths by e-scooter collisions on sidewalks.

Info 3:

In Calgary, 1 in 3 trips by e-scooters replaced a car trip. In Paris, 23% of e-scooter trips were combined with another mode like public transit.

Info 4:

In Austin, Texas, 63% of injuries were within a rider's first nine times using an e-scooter. About half of these were head injuries. A recent national U.S study found head injury rates were double for e-scooter use compared with cycling.

Info 5:

In Paris, 44% e-scooters riders used bicycle lanes, 35% roadways, and 19% sidewalks. 82% want bicycle lanes for using e-scooters.

Info 6:

E-scooters are promoted as an environmentally-friendly mode and as a way to reduce car traffic. Lifespan of dockless e-scooters ranges from 3 months to about 1 year.

# City of Toronto participating in the e-scooter pilot project – Post-information

Top mentions	Frequency (n=1010)
E-scooters are still a new device and should be introduced cautiously, starting with a limited pilot project	51.5%
E-scooters are fun, convenient and should be allowed like bicycles and e-bikes	22.4%
E-scooters are a fad and the city should improve other transportation options	11.3%
E-scooters are dangerous and should not be piloted at this time	10.1%

**QUESTION** – The Government of Ontario has given cities the option to test e-scooters on public roads, trails, parks and sidewalks. What are your initial thoughts on how the City of Toronto should participate in the Province's e-scooter pilot project, if at all? Please select the one answer that best reflects your perspective at this time. [RANDOMIZE] [SINGLE SELECT]

# Potential roles for e-scooters in Toronto's transportation system – Post-information

	Rank 1 (n=1010)	Rank 2 (n=1010)	Rank 3 (n=1010)
Used instead of walking or short transit trips	19.4%	21.2%	18.2%
Used where public transit service is less frequent or not available	15.7%	14.3%	15.5%
Used for fun or recreation	14.9%	17.9%	20.8%
Does not fulfil a real role in Toronto's transportation system	13.7%	9.8%	8.1%
A way for tourists and others to see the city	11.8%	11.4%	12.7%
An alternative to driving	10.7%	11.5%	9.6%
Used to commute to/from work	8.6%	10.6%	7.3%
Unsure	5.2%	3.4%	7.7%

**QUESTION** – Please rank the top three roles you think e-scooters could fulfil in Toronto's transportation system where 1 is the most important, 2 is the second most important and 3 is the third most important.  
[RANDOMIZE]

# Priorities for the City in developing its e-scooter approach - Post-information

	Rank 1 (n=1010)	Rank 2 (n=1010)	Rank 3 (n=1010)
Focus on safety to prevent serious injuries and deaths	26.4%	27.4%	21.8%
Protect pedestrians and persons with disabilities from e-scooters being used on sidewalks	22.2%	20.9%	18.9%
Educate new users of e-scooters to learn how to operate them	19.9%	21.3%	20.7%
Build more infrastructure for e-scooters and other similar uses	10.7%	9.6%	13.7%
Restrict use of e-scooters in Toronto (where parked/where riding)	9.4%	12.7%	14.2%
Ban/not allow e-scooters	6.3%	3.3%	3.6%
Be open and more permissive to dockless e-scooters (parked anywhere)	5.1%	4.9%	7.2%

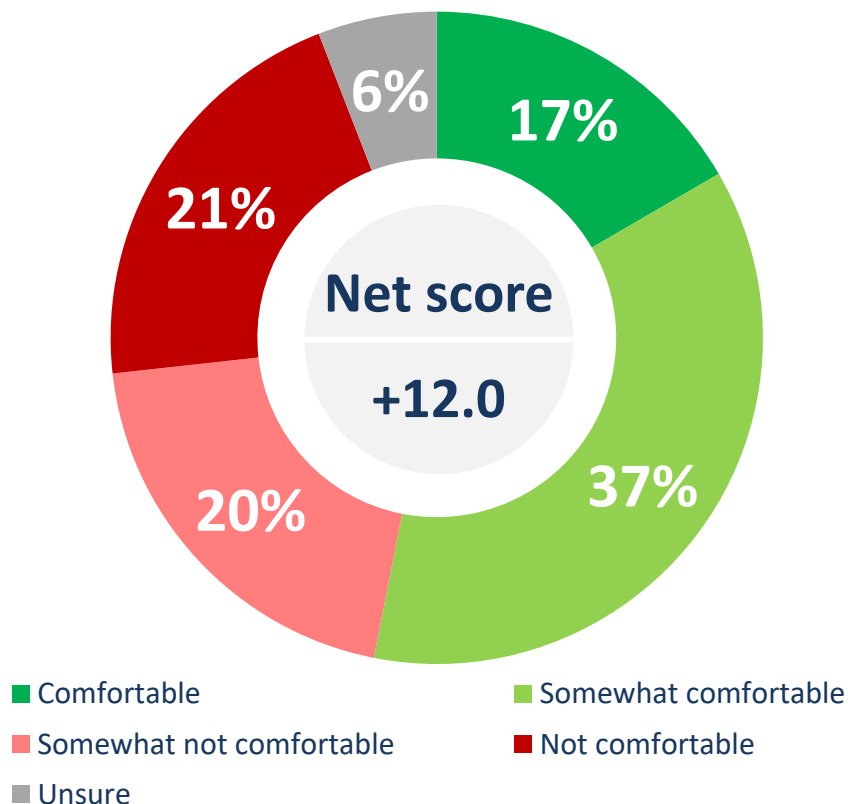
**QUESTION** – What are the things that the City of Toronto should prioritize in developing its approach to e-scooters? Please rank the top three priorities where 1 is the most important, 2 is the second most important and 3 is the third most important. [RANDOMIZE]

# City priorities when evaluating an e-scooter pilot

	Rank 1 (n=1010)	Rank 2 (n=1010)	Rank 3 (n=1010)
Injuries and fatalities compared with other modes	31.2%	24.4%	15.0%
Impacts on all road users and the transportation system	24.6%	23.1%	21.6%
Costs to the city for enforcement, dealing with litter/complaints, lawsuits, claims, and staffing (paramedics, police, oversight, etc.)	14.6%	19.3%	21.1%
Environmental impacts like the lifecycle of e-scooters needs to be monitored	11.4%	13.3%	15.8%
The number of trips taken and shifts in transportation mode used	10.2%	11.1%	15.9%
Social equity and demographics of users	7.9%	8.9%	10.6%

**QUESTION** – If the City of Toronto were to allow e-scooters on public streets, what should the City prioritize when evaluating an e-scooter pilot? Please rank the following in order of importance where 1 is the most important, 2 is somewhat important and so on. [RANDOMIZE]

# Comfort recommending using an e-scooter – Post-information

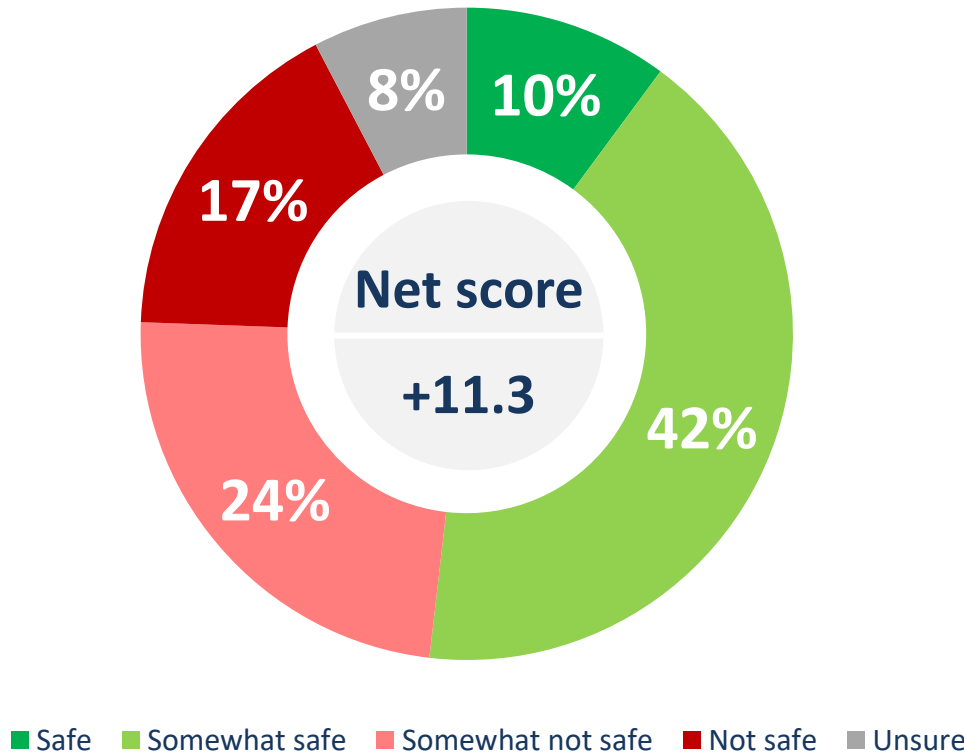


	Comfortable/ somewhat comfortable
Scarborough (n=258)	52.4%
North York (n=235)	48.5%
Etobicoke/York (n=177)	53.0%
Toronto/East York (n=340)	57.1%
Male (n=470)	57.8%
Female (n=529)	49.4%
16 to 34 (n=351)	64.0%
35 to 54 (n=376)	56.8%
55 plus (n=283)	42.7%

\*Weighted to the true population proportion.  
\*Charts may not add up to 100 due to rounding.

**QUESTION** – If the City of Toronto were to allow e-scooters where bikes are allowed on roadways and bike lanes, would you be comfortable, somewhat comfortable, somewhat not comfortable or not comfortable recommending that a loved one use an e-scooter as a mode of transportation in Toronto?

# Safety using an e-scooter – Post-information



	Safe/ somewhat safe
Scarborough (n=258)	51.6%
North York (n=235)	47.7%
Etobicoke/York (n=177)	53.4%
Toronto/East York (n=340)	54.0%
Male (n=470)	58.4%
Female (n=529)	46.6%
16 to 34 (n=351)	66.2%
35 to 54 (n=376)	57.1%
55 plus (n=283)	38.0%

\*Weighted to the true population proportion.  
 \*Charts may not add up to 100 due to rounding.

**QUESTION** – Would you say that using e-scooters is generally safe, somewhat safe, somewhat not safe or not safe?



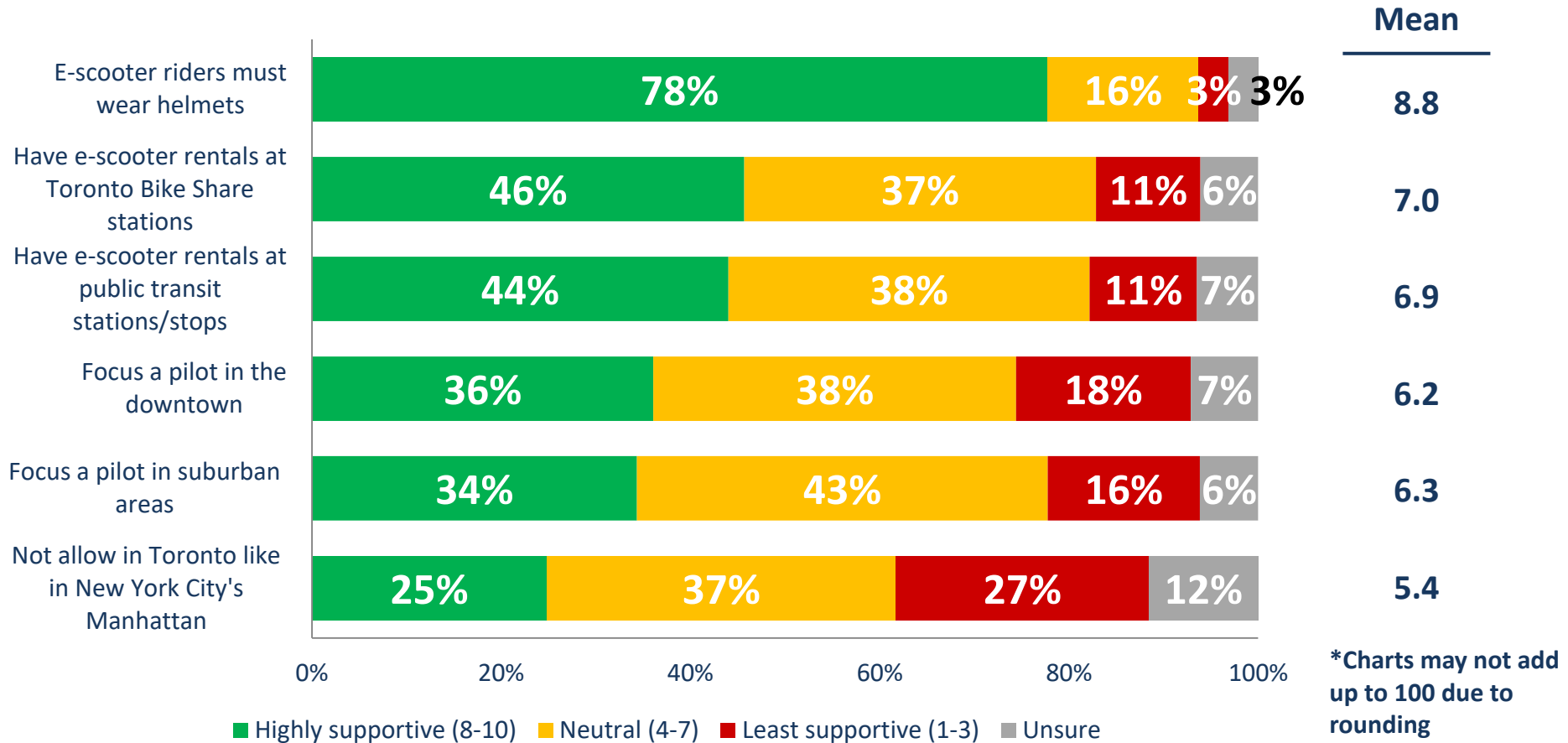
“

*Nearly eight in ten Toronto residents are highly supportive of the initiative that would require e-scooter riders to wear helmets*

”

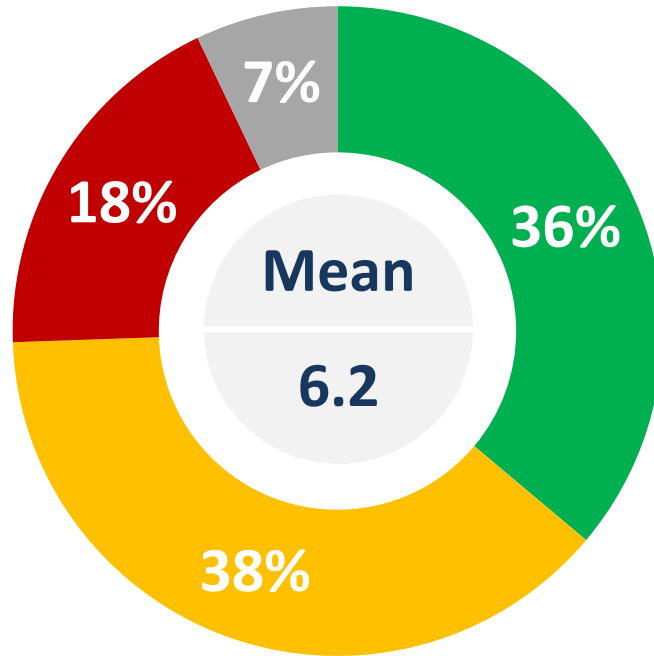


# Support towards e-scooters



**QUESTION** – Dockless e-scooter sharing models in large cities like Toronto have involved fleets in the range of 2,500 in Chicago to about 20,000 in Paris. People can rent these e-scooters from anywhere using a mobile app and they are charged fees by the minute. Please rate each of the following on a scale from 1 to 10, with 1 being least supportive to 10 being highly supportive. [RANDOMIZE Q20-25]

# Support for focusing an e-scooter pilot downtown



■ Highly supportive (8-10) ■ Neutral (4-7) ■ Least supportive (1-3) ■ Unsure

	Mean
Scarborough (n=258)	6.4
North York (n=235)	5.9
Etobicoke/York (n=177)	6.3
Toronto/East York (n=340)	6.3
Male (n=470)	6.4
Female (n=529)	6.2
16 to 34 (n=351)	6.5
35 to 54 (n=376)	6.4
55 plus (n=283)	6.0

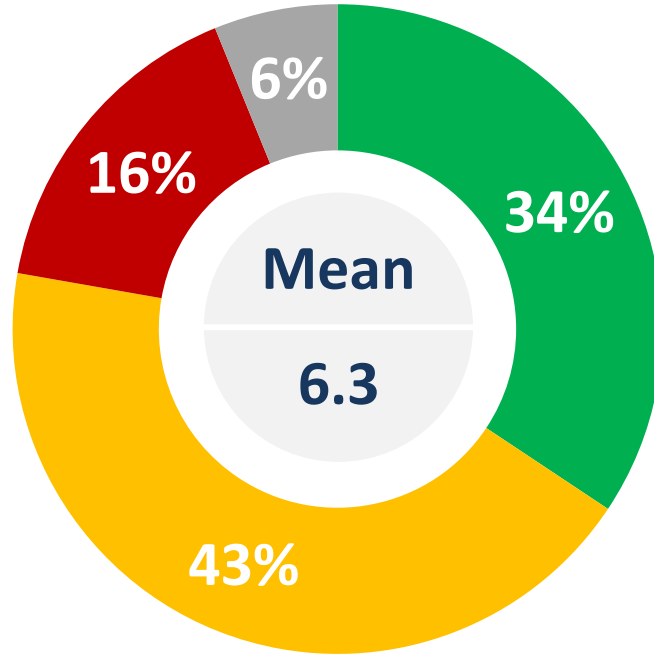
\*Weighted to the true population proportion.

\*Charts may not add up to 100 due to rounding.

**QUESTION** – Dockless e-scooter sharing models in large cities like Toronto have involved fleets in the range of 2,500 in Chicago to about 20,000 in Paris. People can rent these e-scooters from anywhere using a mobile app and they are charged fees by the minute. Please rate each of the following on a scale from 1 to 10, with 1 being least supportive to 10 being highly supportive. [RANDOMIZE Q20-25]

## Focus a pilot in the downtown

# Support for focusing an e-scooter pilot in suburban areas



■ Highly supportive (8-10) ■ Neutral (4-7) ■ Least supportive (1-3) ■ Unsure

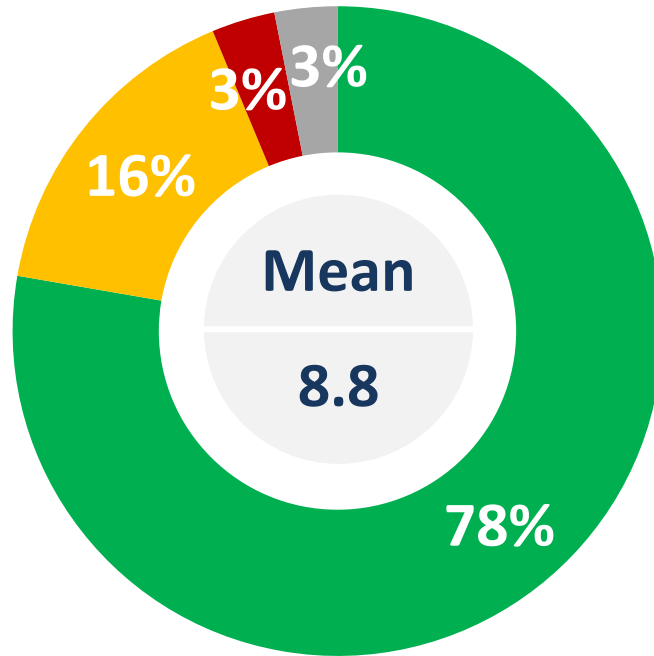
	Mean
Scarborough (n=258)	6.4
North York (n=235)	6.3
Etobicoke/York (n=177)	6.5
Toronto/East York (n=340)	6.2
Male (n=470)	6.4
Female (n=529)	6.3
16 to 34 (n=351)	6.6
35 to 54 (n=376)	6.3
55 plus (n=283)	6.2

\*Weighted to the true population proportion.  
\*Charts may not add up to 100 due to rounding.

**QUESTION** – Dockless e-scooter sharing models in large cities like Toronto have involved fleets in the range of 2,500 in Chicago to about 20,000 in Paris. People can rent these e-scooters from anywhere using a mobile app and they are charged fees by the minute. Please rate each of the following on a scale from 1 to 10, with 1 being least supportive to 10 being highly supportive. [RANDOMIZE Q20-25]

## Focus a pilot in suburban areas

# Support for mandating e-scooter helmet use



■ Highly supportive (8-10) ■ Neutral (4-7) ■ Least supportive (1-3) ■ Unsure

	Mean
Scarborough (n=258)	8.9
North York (n=235)	9.0
Etobicoke/York (n=177)	8.9
Toronto/East York (n=340)	8.5
Male (n=470)	8.6
Female (n=529)	9.0
16 to 34 (n=351)	8.2
35 to 54 (n=376)	8.6
55 plus (n=283)	9.3

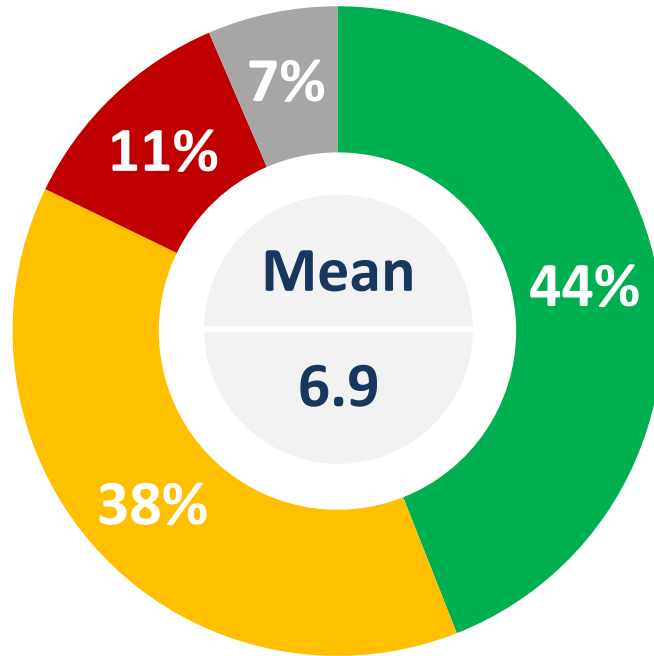
\*Weighted to the true population proportion.

\*Charts may not add up to 100 due to rounding.

**QUESTION** – Dockless e-scooter sharing models in large cities like Toronto have involved fleets in the range of 2,500 in Chicago to about 20,000 in Paris. People can rent these e-scooters from anywhere using a mobile app and they are charged fees by the minute. Please rate each of the following on a scale from 1 to 10, with 1 being least supportive to 10 being highly supportive. [RANDOMIZE Q20-25]

## E-scooter riders must wear helmets

# Support for having e-scooter rentals at public transit stations



■ Highly supportive (8-10) ■ Neutral (4-7) ■ Least supportive (1-3) ■ Unsure

	Mean
Scarborough (n=258)	6.9
North York (n=235)	7.0
Etobicoke/York (n=177)	7.0
Toronto/East York (n=340)	6.9
Male (n=470)	6.9
Female (n=529)	6.9
16 to 34 (n=351)	7.3
35 to 54 (n=376)	7.0
55 plus (n=283)	6.6

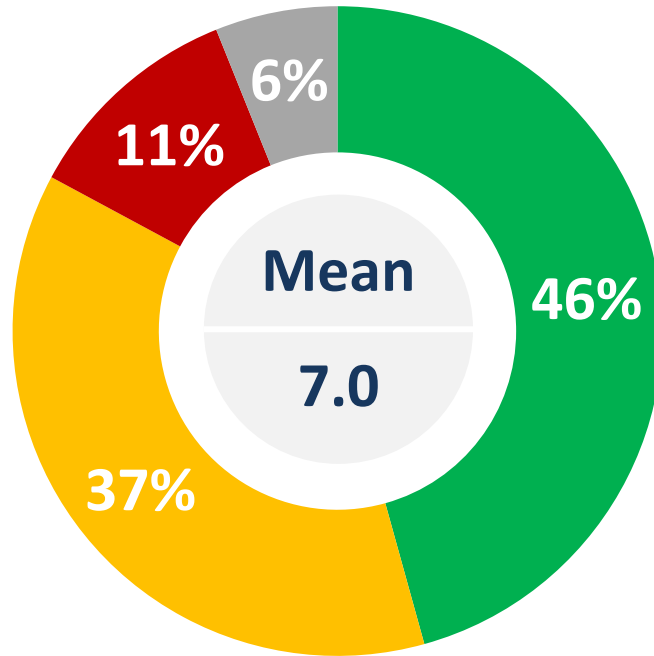
\*Weighted to the true population proportion.

\*Charts may not add up to 100 due to rounding.

**QUESTION** – Dockless e-scooter sharing models in large cities like Toronto have involved fleets in the range of 2,500 in Chicago to about 20,000 in Paris. People can rent these e-scooters from anywhere using a mobile app and they are charged fees by the minute. Please rate each of the following on a scale from 1 to 10, with 1 being least supportive to 10 being highly supportive. [RANDOMIZE Q20-25]

**Have e-scooter rentals at public transit stations/stops**

# Support for having e-scooter rentals at Toronto Bike Share stations



■ Highly supportive (8-10) ■ Neutral (4-7) ■ Least supportive (1-3) ■ Unsure

	Mean
Scarborough (n=258)	7.2
North York (n=235)	6.9
Etobicoke/York (n=177)	6.9
Toronto/East York (n=340)	6.9
Male (n=470)	7.0
Female (n=529)	7.0
16 to 34 (n=351)	7.4
35 to 54 (n=376)	7.1
55 plus (n=283)	6.6

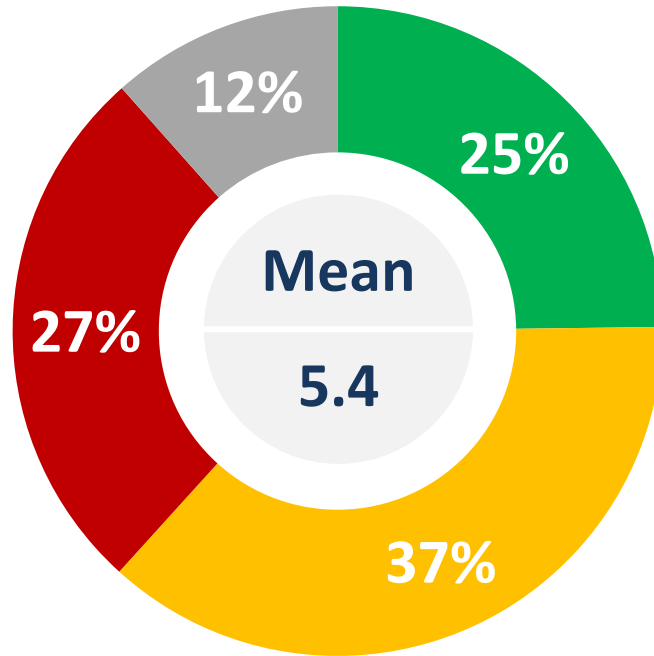
\*Weighted to the true population proportion.

\*Charts may not add up to 100 due to rounding.

**QUESTION** – Dockless e-scooter sharing models in large cities like Toronto have involved fleets in the range of 2,500 in Chicago to about 20,000 in Paris. People can rent these e-scooters from anywhere using a mobile app and they are charged fees by the minute. Please rate each of the following on a scale from 1 to 10, with 1 being least supportive to 10 being highly supportive. [RANDOMIZE Q20-25]

## Have e-scooter rentals at Toronto Bike Share stations

# Support for not allowing e-scooters in Toronto



■ Highly supportive (8-10) ■ Neutral (4-7) ■ Least supportive (1-3) ■ Unsure

	Mean
Scarborough (n=258)	5.6
North York (n=235)	5.6
Etobicoke/York (n=177)	5.1
Toronto/East York (n=340)	5.4
Male (n=470)	5.3
Female (n=529)	5.6
16 to 34 (n=351)	4.7
35 to 54 (n=376)	5.4
55 plus (n=283)	6.0

\*Weighted to the true population proportion.

\*Charts may not add up to 100 due to rounding.

**QUESTION** – Dockless e-scooter sharing models in large cities like Toronto have involved fleets in the range of 2,500 in Chicago to about 20,000 in Paris. People can rent these e-scooters from anywhere using a mobile app and they are charged fees by the minute. Please rate each of the following on a scale from 1 to 10, with 1 being least supportive to 10 being highly supportive. [RANDOMIZE Q20-25]

**Not allow in Toronto like in New York City's Manhattan**





Nanos conducted an online survey of 1010 residents of Toronto, 16 years of age or older, between January 23<sup>rd</sup> to February 1<sup>st</sup>, 2020. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Toronto.

The research was commissioned by the City of Toronto and was conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding.

Element	Description
Research sponsor	City of Toronto
Population and Final Sample Size	1010 Toronto residents drawn from a panel.
Source of Sample	Prodege
Type of Sample	Representative non-probability
Margin of Error	No margin of error applies to this research.
Mode of Survey	Online survey
Sampling Method Base	Non-probability.
Demographics (Captured)	City of Toronto; Men and Women; 16 years or older. Six digit postal code was used to validate geography.
Demographics (Other)	Age, gender, education, income
Field Dates	January 23 <sup>rd</sup> to February 1 <sup>st</sup> , 2020.
Language of Survey	The survey was conducted in English.
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. <a href="https://canadianresearchinsightscouncil.ca/standards/">https://canadianresearchinsightscouncil.ca/standards/</a>

Element	Description
Weighting of Data	The results were weighted by age and gender using the latest Census information (2016) and the sample is geographically stratified to ensure a distribution across the City of Toronto. See tables for full weighting disclosure
Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Excluded Demographics	Individuals younger than 16 years old; individuals without internet access could not participate.
Stratification	By age and gender using the latest Census information (2016) and the sample is geographically stratified to be representative of the City of Toronto.
Estimated Response Rate	Not applicable
Question Order	For the original question order as it was presented in the survey, please find the questionnaire attached.
Question Content	All questions asked are contained in the report.
Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Research/Data Collection Supplier	Nanos Research
Contact	Contact Nanos Research for more information or with any concerns or questions. <a href="http://www.nanos.co">http://www.nanos.co</a> Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com.



As one of North America's premier market and public opinion research firms, we put strategic intelligence into the hands of decision makers. The majority of our work is for private sector and public facing organizations and ranges from market studies, managing reputation through to leveraging data intelligence. Nanos Research offers a vertically integrated full service quantitative and qualitative research practice to attain the highest standards and the greatest control over the research process.

[www.nanos.co](http://www.nanos.co)

## nanos dimap analytika



This international joint venture between [dimap](http://dimap) and [Nanos](http://Nanos) brings together top research and data experts from North American and Europe to deliver exceptional data intelligence to clients. The team offers data intelligence services ranging from demographic and sentiment microtargeting; consumer sentiment identification and decision conversion; and, data analytics and profiling for consumer persuasion.

[www.nanosdimap.com](http://www.nanosdimap.com)

NANOS RUTHERFORD MCKAY & Co.

NRM is an affiliate of Nanos Research and Rutherford McKay Associates. Our service offerings are based on decades of professional experience and extensive research and include public acceptance and engagement, communications audits, and narrative development. [www.nrmpublicaffairs.com](http://www.nrmpublicaffairs.com)