

TRANSPORT FINDINGS

Equity Requirements in US Micromobility Programs Are on the Rise

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Findings

Cities may impose equity requirements on shared micromobility operators (bikeshare and shared e-scooters) to better reach underserved places and travelers. This research examines 243 shared micromobility programs in the US to ask: what share of programs include equity requirements? How prevalent are different types of requirements? And how have requirements evolved over time? We find that 70% of programs have at least one equity requirement, and the share of programs with requirements is increasing over time. The most common requirements include discount rides programs (35%), smartphone alternatives (33%), cash payments (33%), targeted outreach (33%), and equitable vehicle distribution (31%).

1. QUESTIONS

Barriers to micromobility services (shared bikes and e-scooters) limit equitable access to shared micromobility (McNeil et al. 2017). To overcome barriers, many cities impose equity-related requirements. Requirements are program-specific and differ between shared micromobility programs, including those operating within the same city. Mandates may include cash payment, equitable vehicle distribution, adaptive vehicles, smartphone alternatives (e.g., call/text-to-unlock), targeted outreach, information in multiple languages, and/or discounted rides for travelers earning low-incomes. As of 2022, about two-thirds (62%) of US shared micromobility services included at least one equity component (Brown and Howell 2024).

Shared micromobility is a dynamic industry and short-term pilots foster frequent adjustments and iterations amid launches and closures of both programs and operators. The transportation profession also continues to evolve, with transportation equity increasingly prominent in policy and planning efforts.

This research documents the current context of equity requirements in shared micromobility programs in the US and how they have evolved. Specifically, this study asks:

1. What share of US micromobility programs include equity requirements?
2. How prevalent are different equity requirements?
3. How have equity requirements evolved in recent years?

Previous research documents equity requirements from 2010-2022 (Brown and Howell 2024). Yet recent changes within the micromobility industry and cities' approach to micromobility merit revisiting how programs have changed in the past two years, and how the landscape of equity requirements currently stands. First, the micromobility market has increasingly consolidated among a handful of larger operators, one of the largest of whom, Bird, filed for bankruptcy in December 2023. Additionally, as the micromobility industry becomes more mature, cities are increasingly moving from one-year pilot programs to multi-year pilots or permanent programs, which suggests less iteration in programs moving forward relative to fast-paced change that characterized the first years of micromobility operations.

2. METHODS

We compiled a database of equity requirements in the US that includes system-level data for 243 bikeshare, shared scooter, and shared micromobility programs (which include both shared e-scooters and bikes) across 49 U.S. states plus Washington, DC., excluding programs operated by universities. For each program, we recorded equity requirements' presence or absence and qualitative details for each requirement. We obtained equity requirements via phone and email outreach to city staff, public records requests, and online internet searches for publicly available policy documents. Documentation includes program websites, permit applications, municipal codes, requests for proposals (RFPs), among others. The program sample represents a snapshot in time and is limited by online data availability or staff responses. The analysis does not consider all dimensions of equity such as requiring that operators hire W2 rather than contract employees. Additional details on data collection approach and limitations can be found in Brown and Howell (2024).

To examine how equity requirements have changed over time, we used descriptive statistics and two-sample t-tests to compare programs updated or launched in 2023 and 2024 (e.g., issued new RFPs or permits) to programs regulated between 2010 and 2022. Both 2024 and 2022 data are publicly available (Howell, Brown, and Green 2022; Staben et al. 2024).

3. FINDINGS

Seventy percent of US micromobility programs include at least one equity requirement, and 44% of programs include two or more requirements (see [Figure 1](#)). Equity requirements are more common in shared micromobility programs (84%) compared to standalone shared e-scooter (67%) or bikeshare programs (58%). In some cases, cities combined existing e-scooter and bikeshare programs into a single shared micromobility program governed by identical regulations. This combination sometimes resulted in a net increase in equity requirements. For example, Columbus, OH, previously had only

two equity requirements in its bikeshare and e-scooter programs. However, in 2024, the city consolidated these programs into a single shared micromobility initiative, which mandates six equity components.

The most common requirements include discount rides programs (35%), smartphone alternatives (33%), cash payments (33%), targeted outreach (33%), and equitable vehicle distribution (31%). Considerable variation in the structure and design exists within each requirement category. For example, Berkeley, CA mandates exacting distribution of micromobility vehicles: “More than 50% of Devices must be deployed in the Berkeley Equity Priority Communities” (City of Berkeley 2024). In contrast, other cities impose more ambiguous standards such as, “Each Company shall comply with all equitable distribution requirements as may be implemented by the city” (City of Evansville 2019). One new, albeit infrequent, requirement is requiring Braille on vehicles. For example, Oakland, CA’s e-scooters must list “a unique identifying number for each Vehicle, in both English and Braille” (City of Oakland 2024). While Braille does not seek to bolster rider access, it helps create a more inclusive right-of-way by enabling travelers who are blind or sight-impaired to report improperly parked vehicles (Lazo 2019).

Equity requirements are often accompanied by efforts to motivate and increase transparency around program operations. About one-fifth (21%) of programs have stated equity goals; for example, Chicago’s e-scooter share program aims to:

“Increase access to and ridership of shared micromobility for all Chicagoans, but especially for residents facing elevated economic, health, mobility and accessibility barriers.” (City of Chicago 2022).

While most program requirements (82%) state that operators must share data with the city, far fewer (19%) publish publicly-available evaluation reports or articulate specific enforcement mechanisms tied to compliance (16%).

[Figure 2](#) shows that a higher share of programs updated or launched in the past two years contain at least one equity requirement (70%) compared to programs updated or launched between 2010 and 2022 (60%). Rising rates of equity requirements is evident in both shared e-scooter and shared micromobility programs; comparatively, the share of bikeshare programs that include at least one equity requirement remained static (58%).

The share of programs that require equitable vehicle distribution, smartphone alternatives, cash payment, and target outreach requirements was not significantly different in 2023/24 compared to programs launched or updated between 2010-2022 (see [Figure 3](#); solid bars represent statistically significant difference at $p < 0.05$). The share of programs requiring discount rides options, adaptive vehicles, and multiple languages, by contrast, increased significantly. Nearly half of programs (44%) now include requirements that

2024 US Shared Micromobility Equity Requirements at a Glance



Figure 1. Shared Micromobility Equity Requirements, 2024

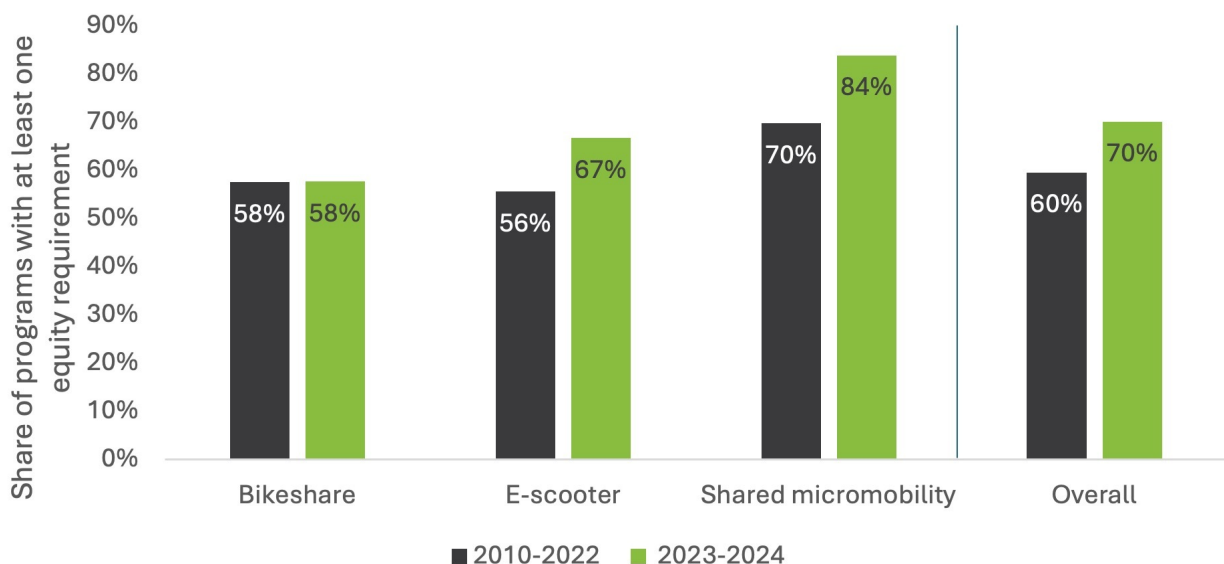


Figure 2. Programs with at Least One Equity Requirement, 2023/4 versus 2010-2022

operators discount prices for income-qualified riders compared to about one-third (31%) of programs updated or launched before 2023. These changes represent both entirely new programs, as well as programs that previously did not require discount rides but now do. Long Beach, CA's e-scooter program began in 2020, and in 2023 their updated Shared Micromobility

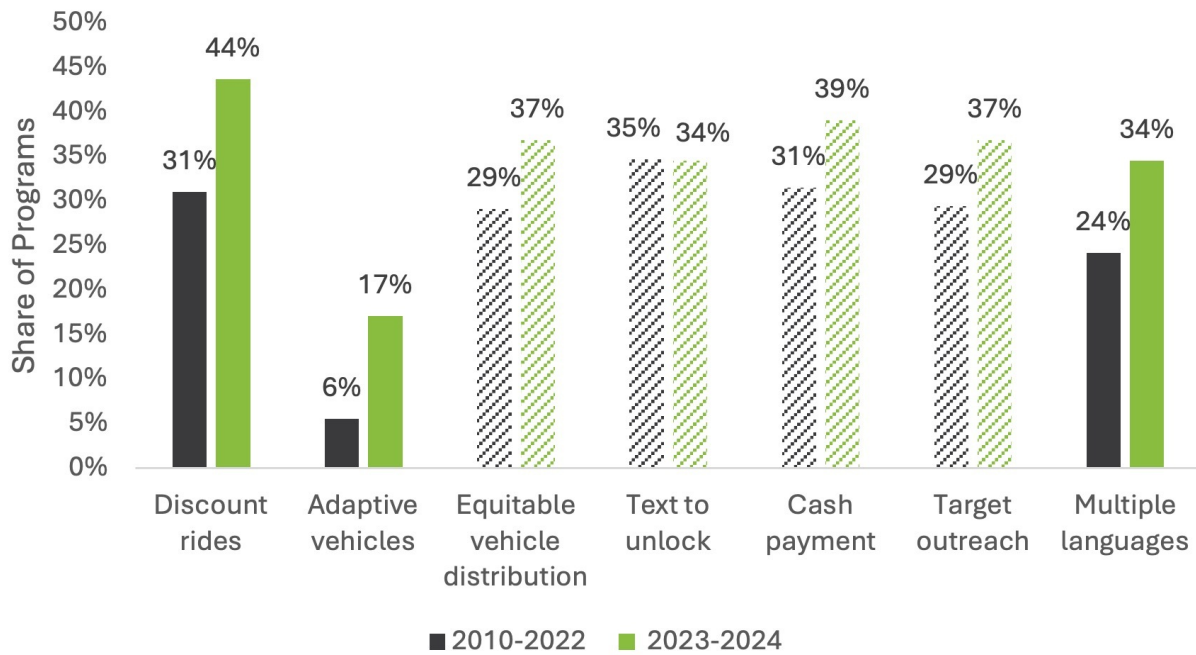


Figure 3. Types of Equity Requirements, 2023/4 versus 2010-2022 and earlier

Solid bars represent statistically significant difference at $p < 0.05$.

Regulations established that “Operators must implement a fare structure that encourages riders to use the system who may not otherwise do so due to a cost burden” (City of Long Beach 2023). Similarly, the share of programs requiring operators offer adaptive vehicles increased from 6% to 17%. Finally, the share of programs requiring services to be offered in multiple languages increased significantly from 24% to 34%.

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