

ROAD SAFETY AUTHORITY



National Survey on E-Scooters 2024

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Nov 2024

RSA National Survey on E-Scooters 2024



E-Scooter Users



New laws on use of E Scooters



Sharing the road



Key learnings

Research Background & Objectives



The RSA's core objective is to save lives and prevent injuries by reducing the number and severity of collisions on Irish roads; this National Survey on e-scooters has been conducted to assess and identify road safety policy measures which could improve road user safety.

The research assessed e-scooters usage (current & prospective); attitudes to usage; new laws on usage; road behaviour of e-scooters and other road users.

The full programme of interviews was conducted online, and all aspects of the survey design were managed by Ipsos B&A internally with the sample drawn from our own consumer panel 'Acumen'.

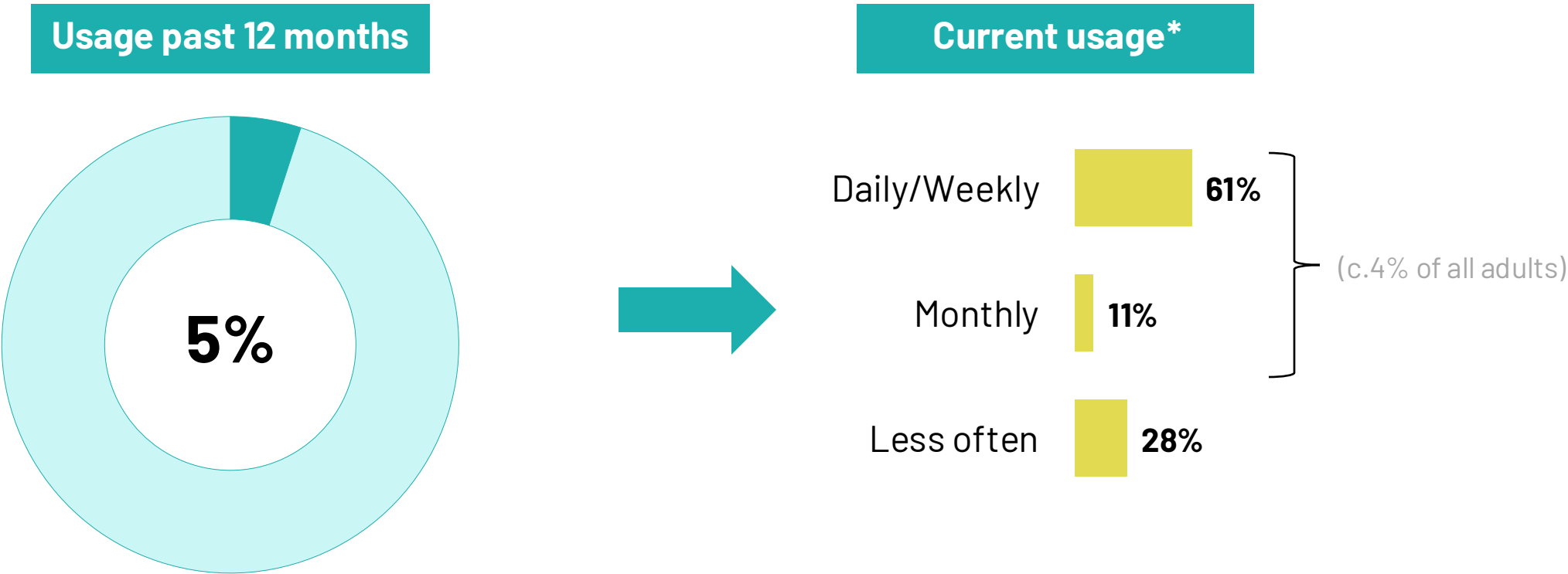
- The sample was strictly quota controlled to deliver a nationally representative sample of adults aged 16 years plus. In addition, a booster sample of e-scooter users was included in the survey. In total, the survey comprised 1,254 interviews.
- The sample selected for the survey was extracted abiding by strict contact rules with individuals randomly selected within the survey target groupings. The quality controls applied to each survey include a series of integrity checks, including time for completion and screening data response patterns.
- This research was conducted in October 2024.

E-SCOOTER USERS



E-Scooter Current Usage

5% of Irish adults used an e-scooter in the past 12 months with over 70% of these now being regular users (daily/weekly + monthly) - in total therefore 4% of adults are currently regular users.



Q.2 In the past twelve months, have you used any of the following on a public road, footpath or cycle lane in Ireland?

Q.2b Which of the following best describes how often you currently use an E-scooter (Electric scooter) on a public road, footpath or cycle lane in Ireland

Base: All Adults N - 1254

* In addition to the nationally representative sample, a booster sample of e-scooter users was included in the survey with the usage data being weighted back to the national incidence at the analysis stage.

E-Scooter Current Usage: Demographic Profile

Current e-scooter usage is primarily a young adult and Dublin & Urban phenomenon: 75% of users are under the age of 35 years and 65% of users live in Dublin and 97% in urban areas.

		All	*E-Scooters Regular Users (N 152)
Gender	Male	49%	76%
	Female	51%	24%
Age	16-24 years	14%	48%
	25-34 years	15%	27%
	35-49 years	27%	20%
	50+ years	43%	6%

		All	*E-Scooters Regular Users (N 152)
Social Class	ABC1	52%	70%
	C2DE	48%	30%
Region	Dublin	29%	65%
	Ex Dublin	71%	35%
Area	Urban	67%	97%
	Rural	33%	3%

Sample of Analysis

Base: All Adults N - 1254

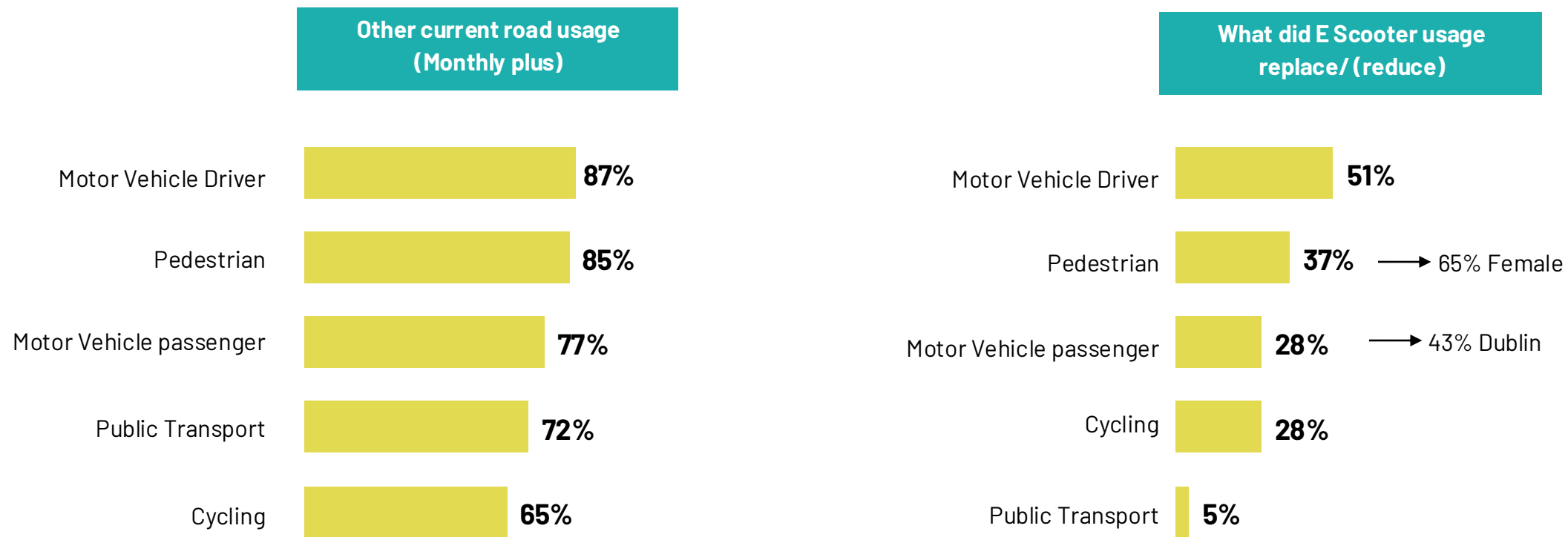
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* Currently use E-Scooter daily, weekly or monthly



E-Scooter Current Users: Other Forms of Road Usage

E-scooter users' other road activity is extensive: the vast majority are also drivers, cyclists and use public transport. E-scooter use is also most likely to have led to a reduction in (rather than replacement of) driving.



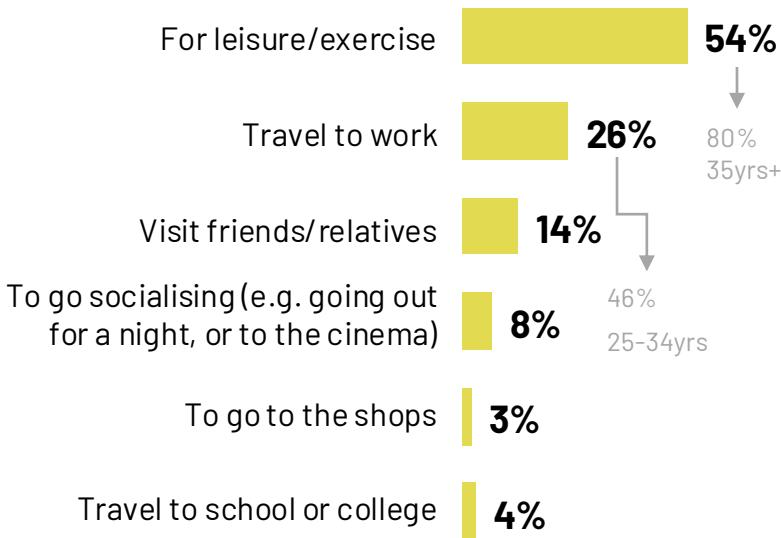
Q1 Which of the following best describes how often you typically travel in the following ways?
Q.2c You mentioned you currently use an E-scooter. Which previous form of transport has your current E-scooter use replaced?
Base: Regular users N – 152*

* Currently use E-Scooter daily, weekly or monthly

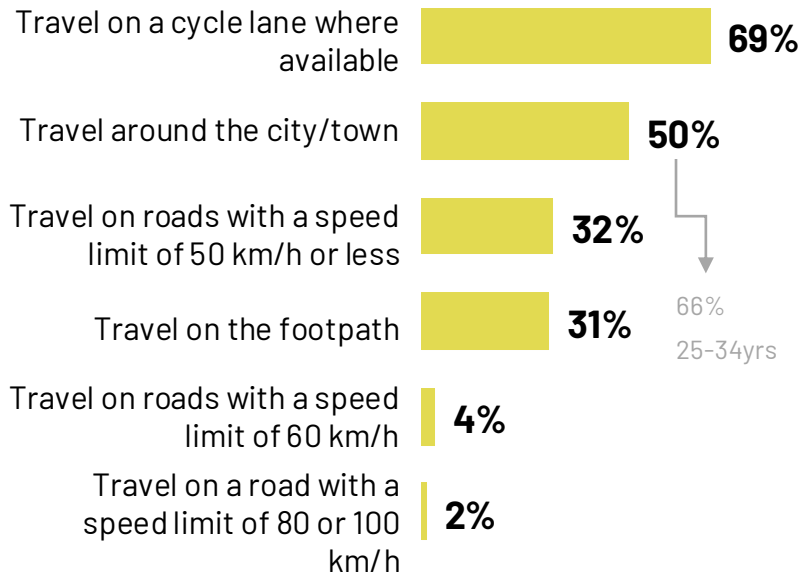
E-Scooter Current Users: Usage Profile

Near 1 in 3 use e-scooters on footpaths, while 1 in 2 'travel around the city/ town'. 2 in 3 regular e-scooter users wear reflective gear.

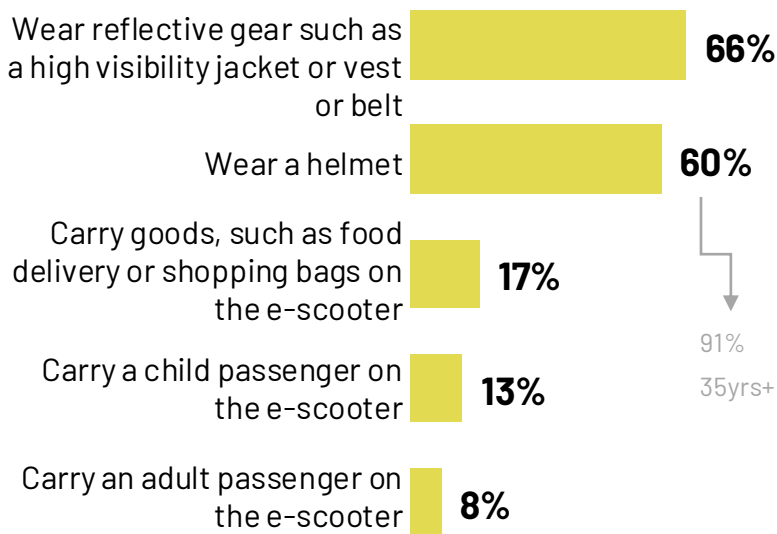
Typical Trips



Road Types



Clothing/Carrying



Q.7a What kind of trip(s) do you use an e-scooter for?
Q.8 Where do you travel when using an e-scooter?
Q.9 Do you do any of the following when using an e-scooter?
Base: Regular users N = 152*

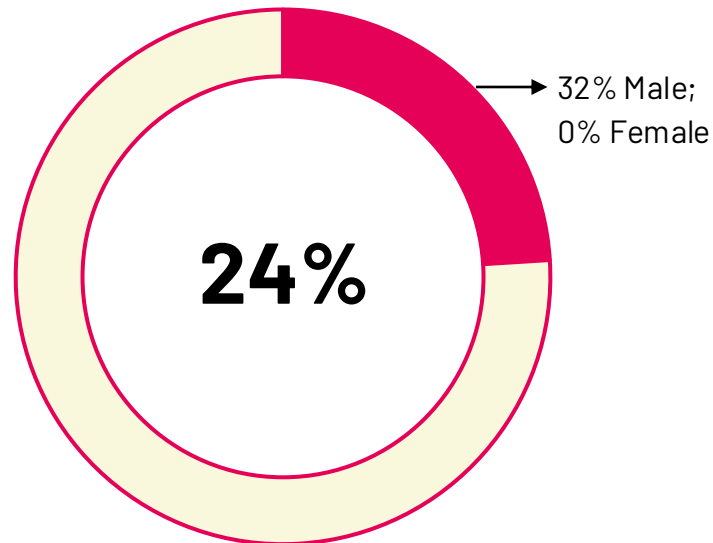
* Currently use E-Scooter daily, weekly or monthly



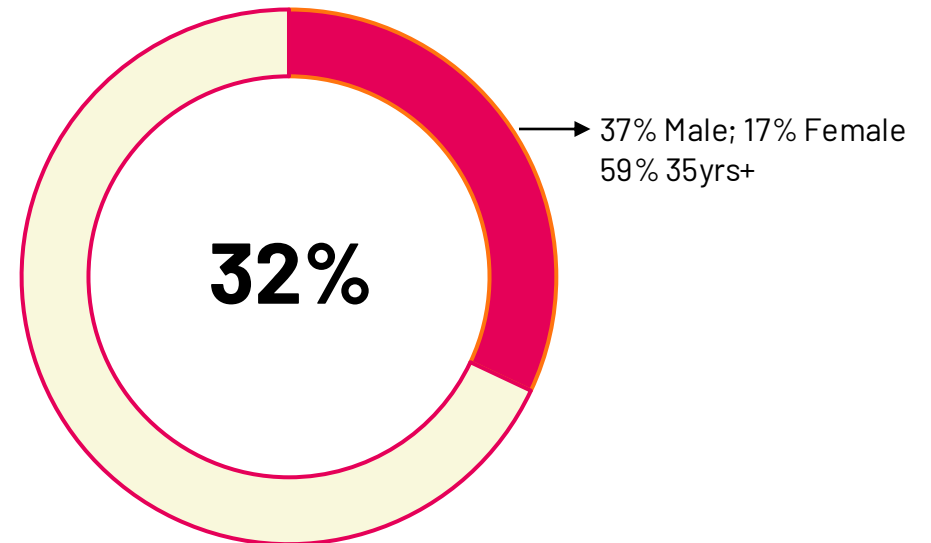
E-Scooter Current Users: Collision

An unsettling 24% of current users (all male) have already been involved in a road collision as an e-scooter user. In addition, 32% have been involved in a 'near miss'.

Road collision



'Near miss'



Q.16a Have you ever been involved in a road collision as an E-scooter user?

Q.16b Have you ever been involved in a 'near miss' i.e. you narrowly escaped a collision with another road user as an E-scooter user?

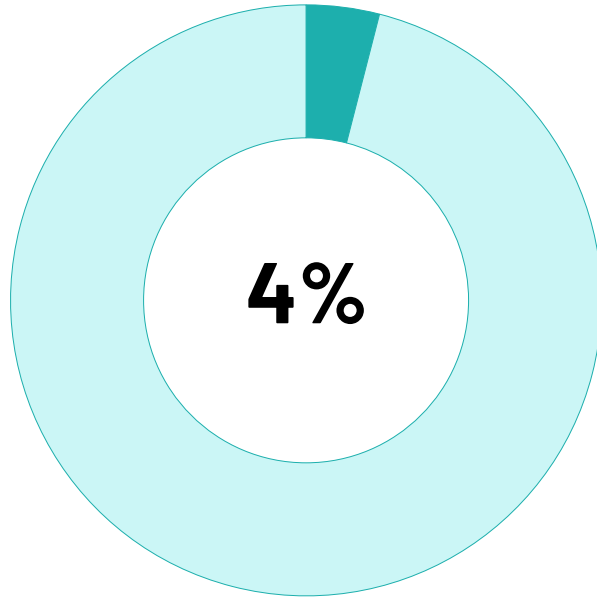
Base: Regular users N - 152*

* Currently use E-Scooter daily, weekly or monthly

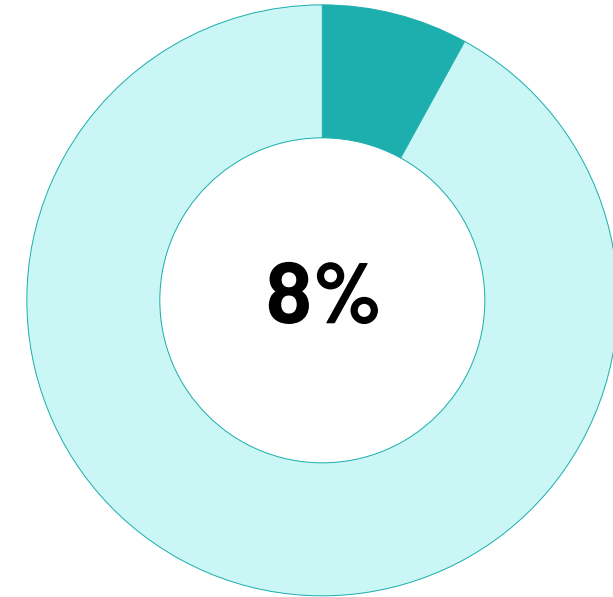
E-Scooter: Current & Prospective Use

Research estimate is that total e-scooter usage may triple in next 12 months (grow to 12%)

Current regular users*



Next 12 months likely to buy/rent



Q.2 In the past twelve months, have you used any of the following on a public road, footpath or cycle lane in Ireland?

Q.5a In the next twelve months, how likely is it that you will buy an e-scooter for your own use?

Q.5b In the next twelve months, how likely is it that you will rent an e-scooter when this option becomes available?

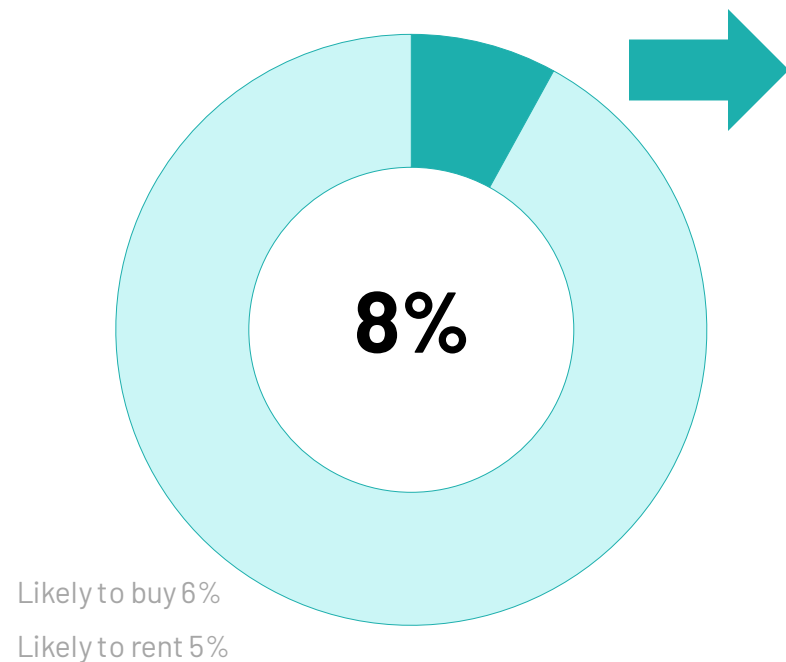
Base: All Adults N - 1254

* Currently use E-Scooter daily, weekly or monthly

E-Scooter: Prospective Use 'next 12 months'

Prospective users are likely to accentuate the current user profile: young males in Dublin. Prospective use places more emphasis on leisure trips (shops, visiting friends, socialising).

Next 12 months likely to buy/rent



Demographics

Male 14 %
<35yrs 15%
Dublin 14 %

**Likely trips

Leisure/exercise 41%
To work 32%
Last mile trip 29%
Shops 28%
Visit friends/ relatives 27%
Socialising 21%

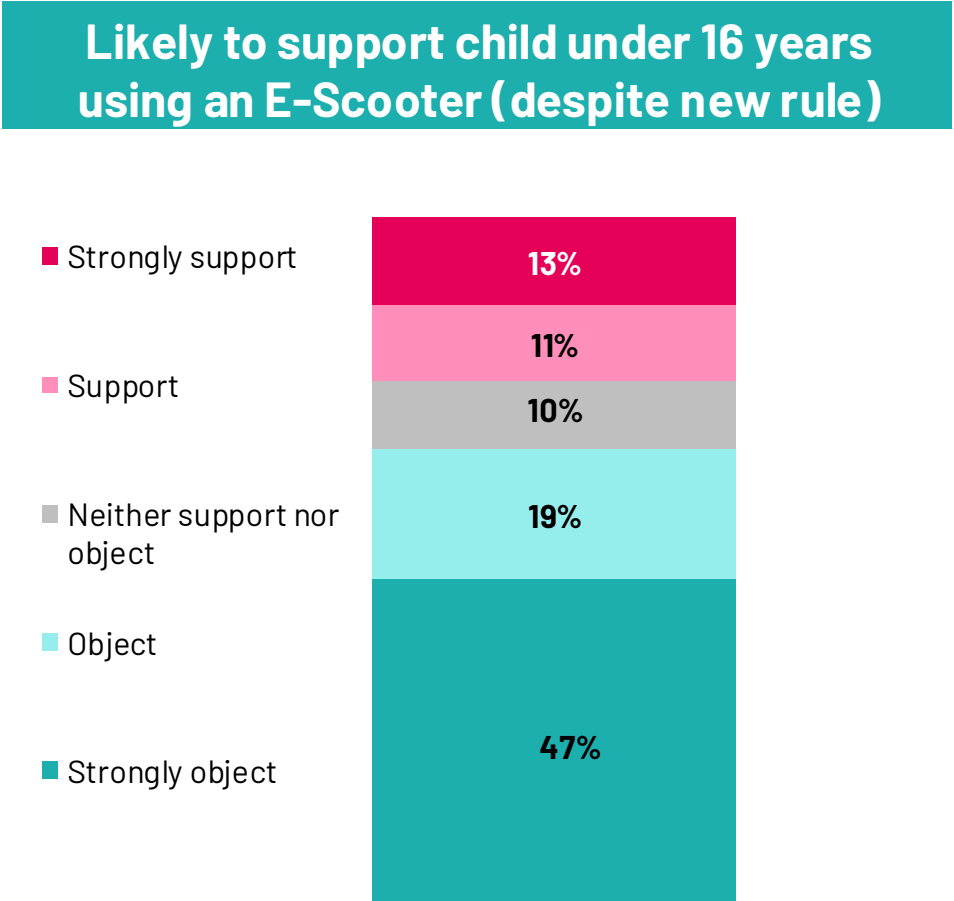
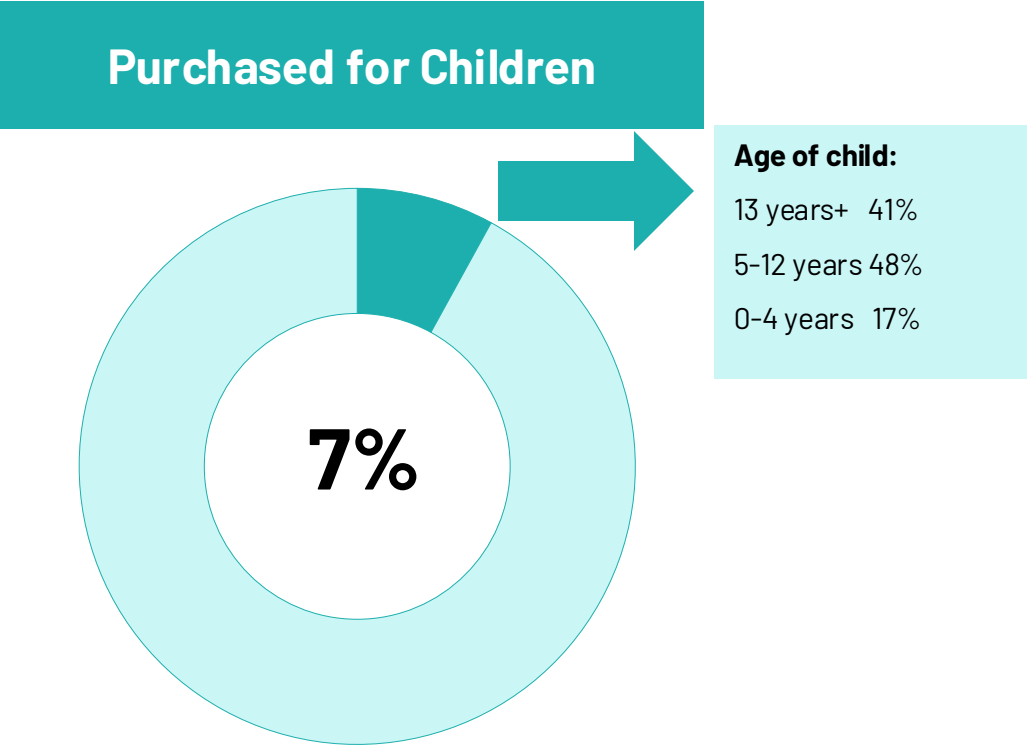
Q.2 In the past twelve months, have you used any of the following on a public road, footpath or cycle lane in Ireland?
Q.5a In the next twelve months, how likely is it that you will buy an e-scooter for your own use?
Q.5b In the next twelve months, how likely is it that you will rent an e-scooter when this option becomes available?
Q.7b What kind of trip(s) will you likely use an e-scooter for?

Base: All Adults N - 1254

** N - 108, likely to buy or rent in the next 12 months

Children and E-Scooters

Relatively high incidence of purchase for children under 13 years may indicate some confusion over distinguishing between types of 'scooters'.



Q.2d Have you purchased any of the following for your children to use?
Q.2e And what age was your child when purchased their E-scooters?
Q.12 How likely are you to support your child under 16 years using an E-scooter?
Base: All parents of children under 16 years

NEW LAWS ON USE OF E-SCOOTERS



Awareness: E-Scooters Now Legal on Irish Roads

While awareness of the new legality of e-scooter use is strong overall, it extends to only 3 in 4 current users.

'On 20 May 2024, new laws were introduced making e-scooters legal for use on Irish roads. Prior to this survey, **were you aware that a law had been introduced to allow e-scooters on roads?**'



Q.4 Were you aware that a law had been introduced to allow e-scooters on roads?

Base: All Adults N - 1254

* Currently use E-Scooter daily, weekly or monthly

E-Scooter New Laws & Potential Regulators: Summary

NEW LAWS ON USE	NET SUPPORT
Users must not hold a mobile phone while using an e-scooter in traffic	93%
E-scooters are not permitted for use on the road by those under 16 years old	92%
E-scooters must follow the same rules of the road as cyclists	92%
E-scooters are not permitted to be used on footpaths	86%
Users cannot carry passengers on an e-scooter	85%
E-scooters must not exceed 20 km/h	84%
E-scooters can be used on cycle lanes	72%
Users cannot carry goods on an e-scooter, such as food delivery	72%
E-scooters can be used in bus lanes	33%



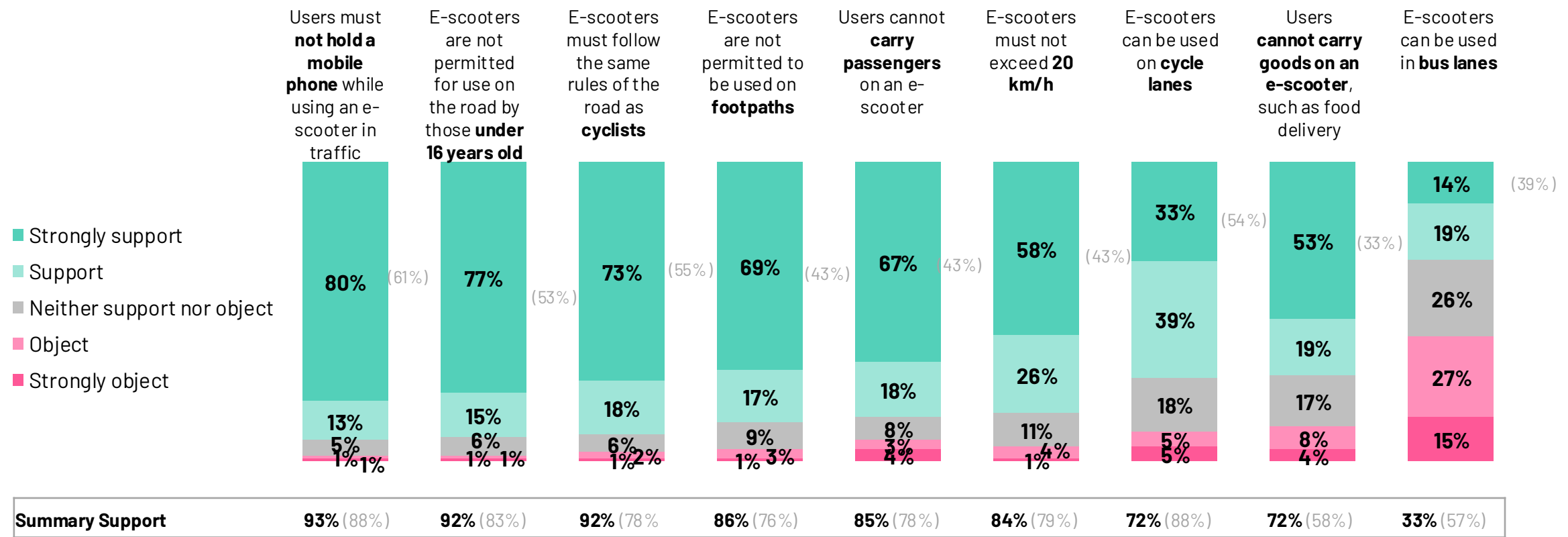
POTENTIAL REGULATIONS (RENTAL SCHEMES)	NET Support
Rental companies must ensure, as best they can, that users are not drunk or their ability to use is not impaired by any other substance.	89%
Rental e-scooters must be parked in designated parking zones on the street when a person is finished using them	87%
Rental companies must engage a beginner mode for new users which reduces the speed at which they can travel	82%
New users must take part in 'on the road' training before they can rent them	79%
New users are required to take part in online training before they can rent them	78%
Rental e-scooters must be used during set times only, that is they are not available to use throughout the night	68%
Rental e-scooters can only be used in certain geographic areas in the city or town	64%
Rental e-scooters can be left in any location on the street when a person is finished using them	18%

Q.10 The following statements relate to the new laws regarding the use of e-scooters in Ireland. To what extent do you support or not each of the following regulations on the use of e-scooters?

Q.13 When made available to rent on the street, to what extent would you support or not each of the following regulations on the use of e-scooters through rental schemes?

New Laws on E-Scooters Use: Attitudes

Support for new laws shows considerable variation between the public and regular users – support among users is typically much lower. Support is notably weaker among the public for e-scooter use in cycle and, particularly, bus lanes.



(Currently use E-Scooter daily, weekly or monthly)

Q.10 The following statements relate to the new laws regarding the use of e-scooters in Ireland. To what extent do you support or not each of the following regulations on the use of e-scooters?

Base: All Adults N - 1254



New laws on E-Scooters use: Attitudes

Levels of support diverge considerably with age, younger adults show much less support for any limiting rules than those 50+

SUMMARY SUPPORT	Total	Gender		Age					Social Class		Region		Area		E-scooter Regular Users *
		Male	Female	<25	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural	
Base	1254	614	640	190	329	290	256	189	654	600	417	837	910	344	152
Users must not hold a mobile phone while using an e-scooter in traffic	93	91	95	83	89	94	97	97	94	92	90	94	91	96	88
E-scooters are not permitted for use on the road by those under 16 years old	92	90	95	77	90	94	97	97	92	93	88	94	90	96	83
E-scooters must follow the same rules of the road as cyclists	92	90	93	78	88	92	97	98	92	92	88	93	90	94	78
E-scooters are not permitted to be used on footpaths	86	86	87	67	80	86	96	96	87	86	85	87	84	90	76
Users cannot carry passengers on an e-scooter	85	83	87	70	83	83	92	92	85	86	82	86	84	88	78
E-scooters must not exceed 20 km/h	84	80	88	64	75	85	93	94	84	84	80	86	82	89	79
E-scooters can be used on cycle lanes	72	70	73	72	72	74	71	69	73	70	73	71	72	71	88
Users cannot carry goods on an e-scooter, such as food delivery	72	70	74	48	60	71	83	88	70	75	68	74	70	77	58
E-scooters can be used in bus lanes	33	40	25	29	37	36	30	29	37	28	42	29	36	27	57

Q.10 The following statements relate to the new laws regarding the use of e-scooters in Ireland. To what extent do you support or not each of the following regulations on the use of e-scooters?

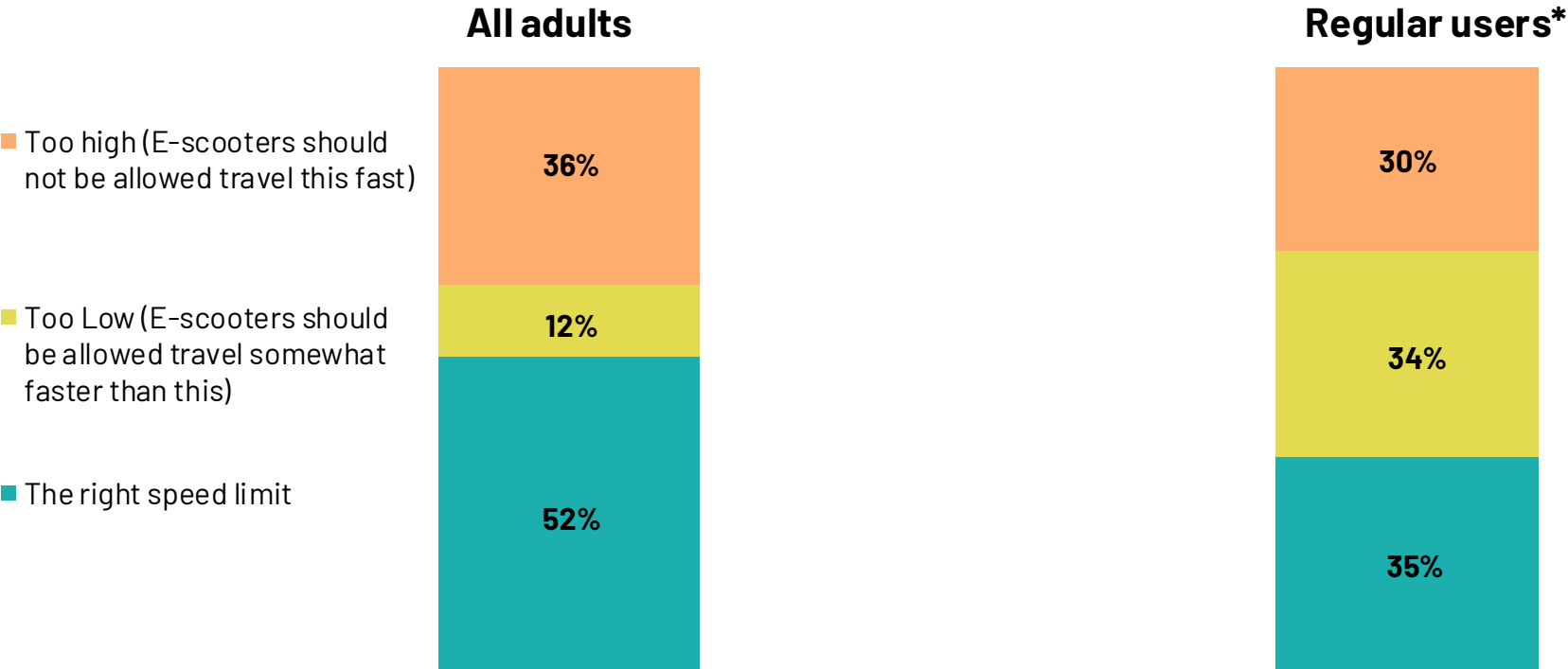
Base: All Adults N - 1254

* Currently use E-Scooter daily, weekly or monthly

New laws on E-Scooters use: Speed limits

Only half the public feel the 20km/h speed limit for E-scooters is appropriate: over 1 in 3 think it is 'too high'. Regular users are more divided with almost an even split thinking the speed limit is 'too high', 'too low', 'the right limit'.

'The **speed limit for E-scooters is 20km/h**. Do you think this speed limit is...?'

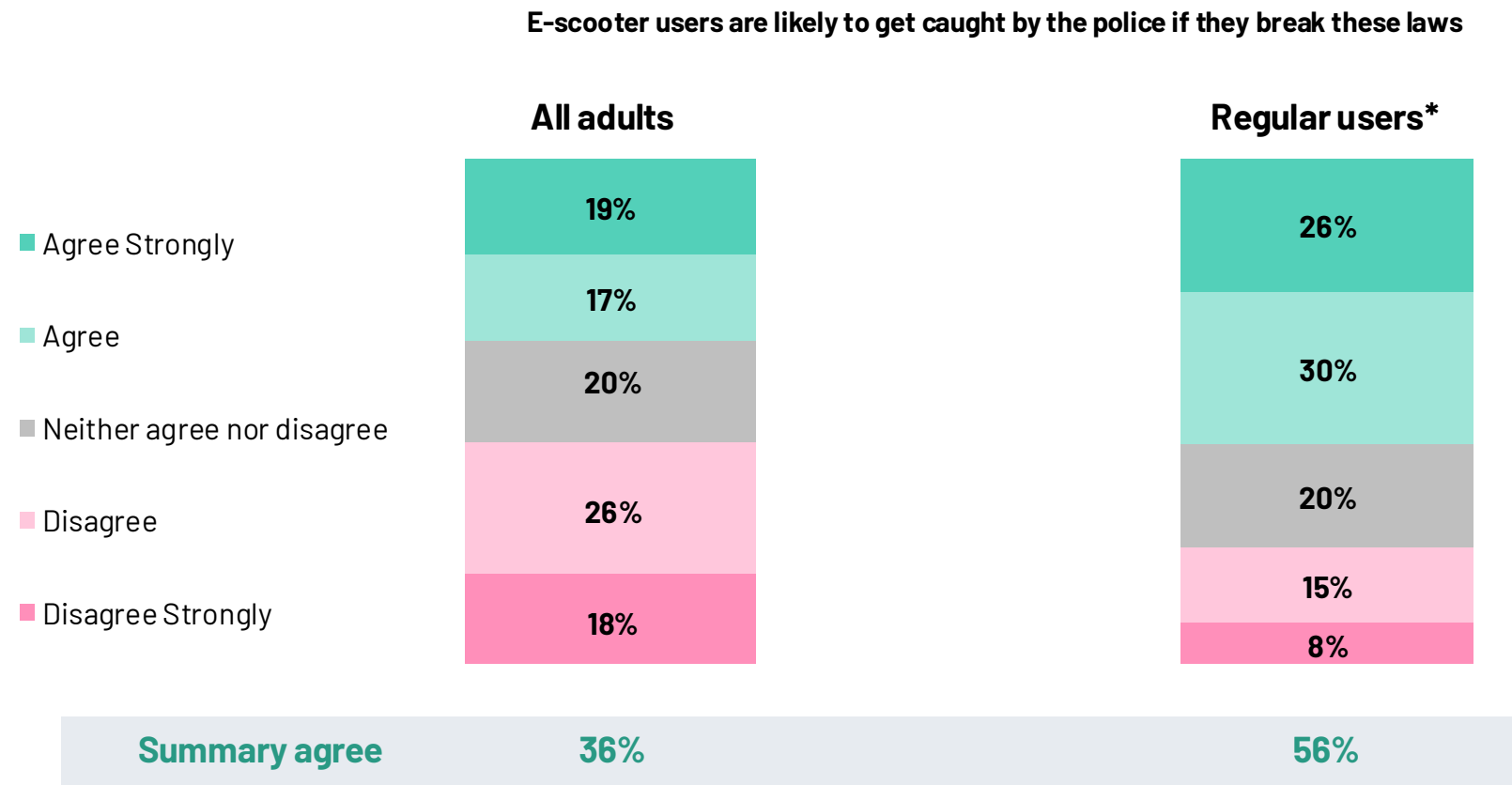


* Currently use E-Scooter daily, weekly or monthly



New laws on E-Scooters use: Enforcement

There is public scepticism on the effective enforcement of the new e-scooter laws. Regular users however consider it more probable that users will get caught by the police if they break the new laws.

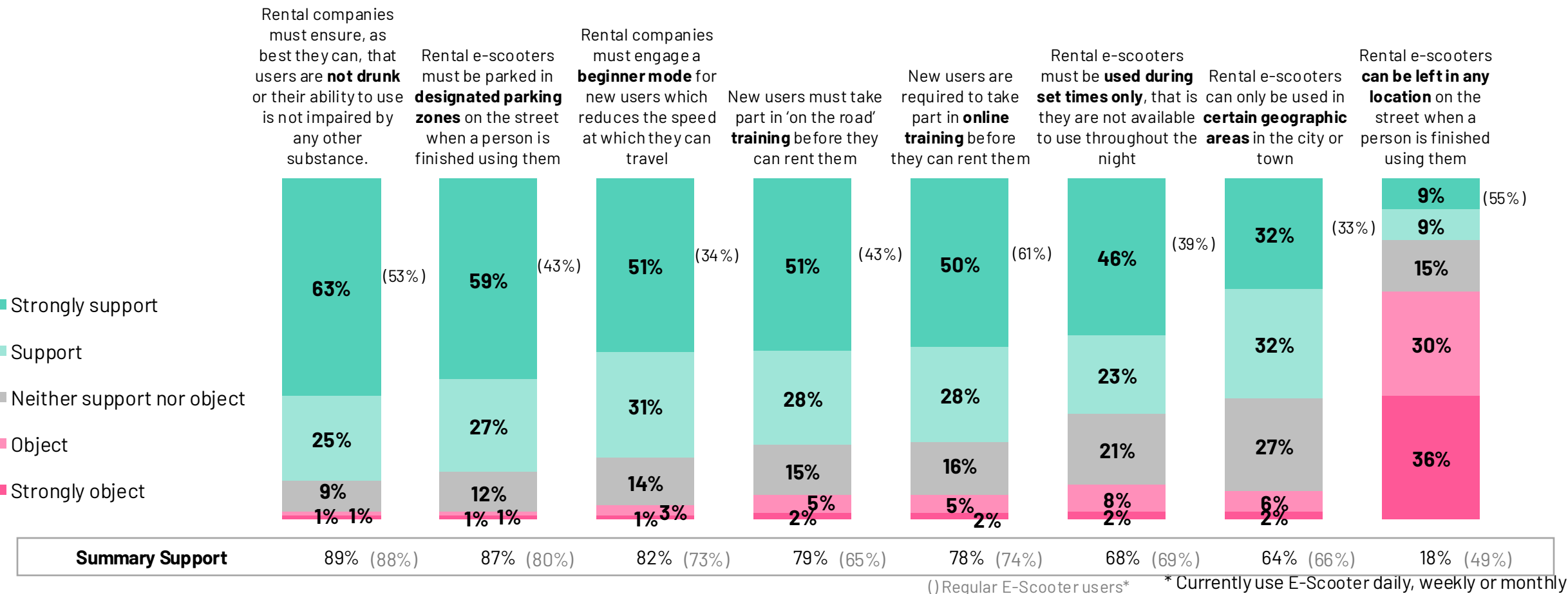


* Currently use E-Scooter daily, weekly or monthly

Q.11 To what extent do you agree or disagree with the following statement? - E-scooter users are likely to get caught by the police if they break these laws
Base: All Adults N - 1254

Potential Regulations: Renting E-Scooters

The public and regular users show similar levels of support for rental regulations. Regular users are less supportive of 'beginner modes' and 'on the road' training, and more supportive of leaving rental scooters anywhere when finished use.



Q.13 When made available to rent on the street, to what extent would you support or not each of the following regulations on the use of e-scooters through rental schemes?

Base: All Adults N - 1254



Proposed Regulations: Renting E-Scooters

Similarly to the new rules on use, younger adults are typically much less likely to support rental regulations

Summary Support	Total	Gender		Age					Social Class		Region		E-scooter Regular Users
		Male	Female	<25	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Ex Dublin	
Base	1254	614	640	190	329	290	256	189	654	600	417	837	152
Rental companies must ensure, as best they can, that users are not drunk or their ability to use is not impaired by any other substance.	89	85	92	85	86	87	91	94	91	86	88	89	88
Rental e-scooters must be parked in designated parking zones on the street when a person is finished using them	87	85	89	76	82	88	90	93	88	85	86	87	80
Rental companies must engage a beginner mode for new users which reduces the speed at which they can travel	82	78	86	68	75	80	88	93	82	82	80	83	73
New users must take part in 'on the road' training before they can rent them	79	75	82	65	72	75	84	94	78	79	74	81	65
New users are required to take part in online training before they can rent them	78	74	81	61	71	75	84	90	77	79	75	79	74
Rental e-scooters must be used during set times only , that is they are not available to use throughout the night	68	64	72	53	61	67	73	81	68	69	64	70	69
Rental e-scooters can only be used in certain geographic areas in the city or town	64	64	65	48	62	61	71	76	65	64	62	65	66
Rental e-scooters can be left in any location on the street when a person is finished using them	18	21	15	27	29	19	10	11	21	15	22	16	49

* Currently use E-Scooter daily, weekly or monthly

Q.13 Please see below statements about the advertising we have just discussed. For each one please tell us the extent to which you agree or disagree with each statement?

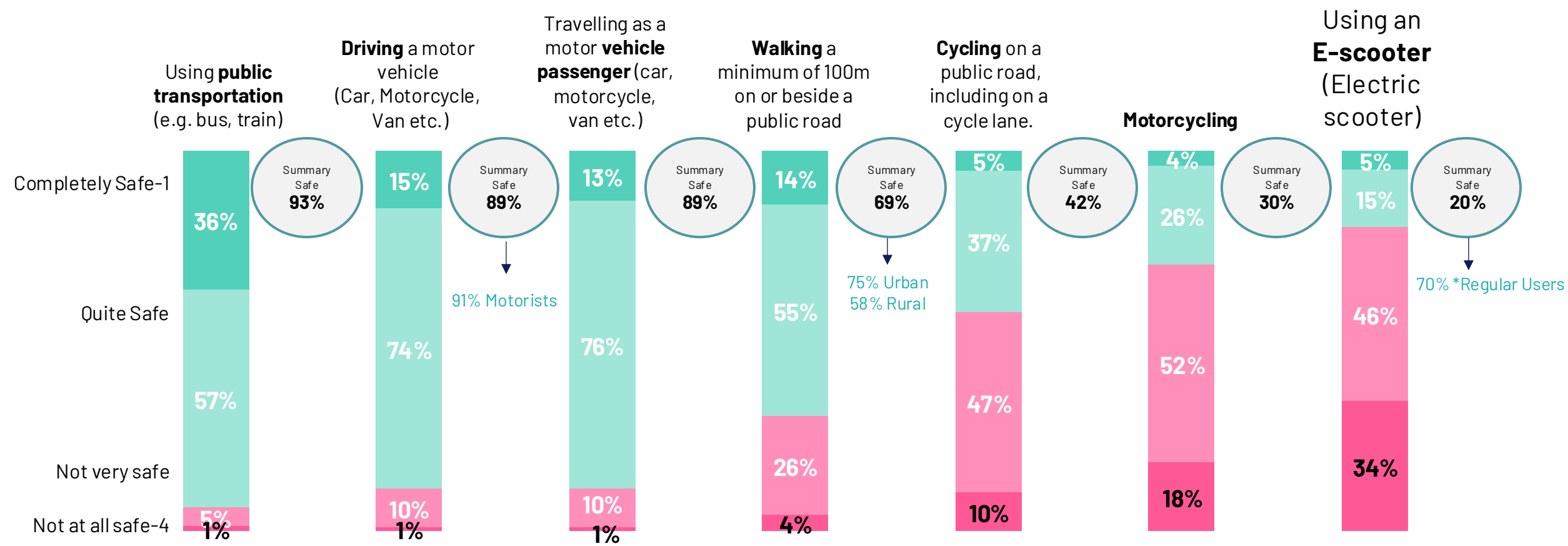
Base: All Adults N - 1254

SHARING THE ROAD



Perceived Safety of Transport Modes

E-scooters are now considered the most dangerous transport mode, even more dangerous than motorcycles. The perception of safety is vastly different among regular users (70% consider usage 'safe' versus 20% of all adults.).

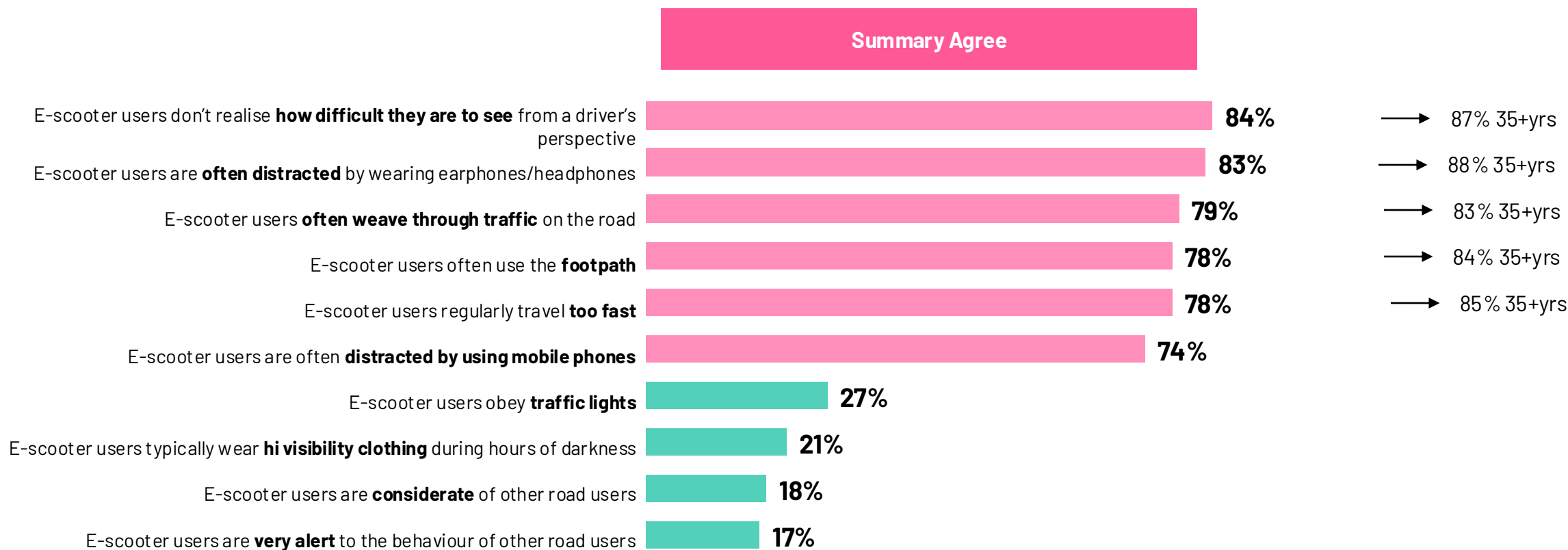


* Currently use E-Scooter daily, weekly or monthly



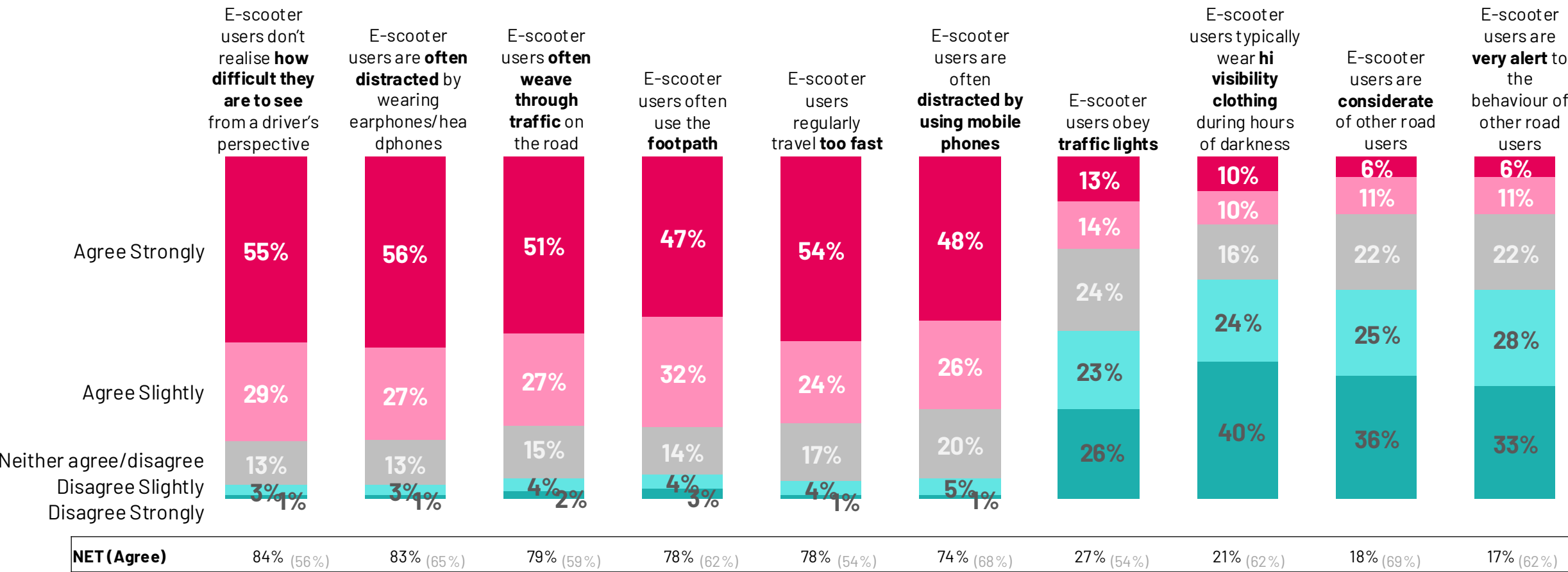
Perceptions on E-Scooter Users: Summary

There are consistently high levels of criticism directed at E-scooter users across multiple criteria



Perceptions on E-Scooter users

There are consistently very high levels of criticism directed at E-scooter users across multiple criteria (and indeed the majority of E-scooter users are also often self critical of their groups behaviour).



Q.14 To what extent do you agree or disagree with the following statements?

Base: All Adults N = 1254

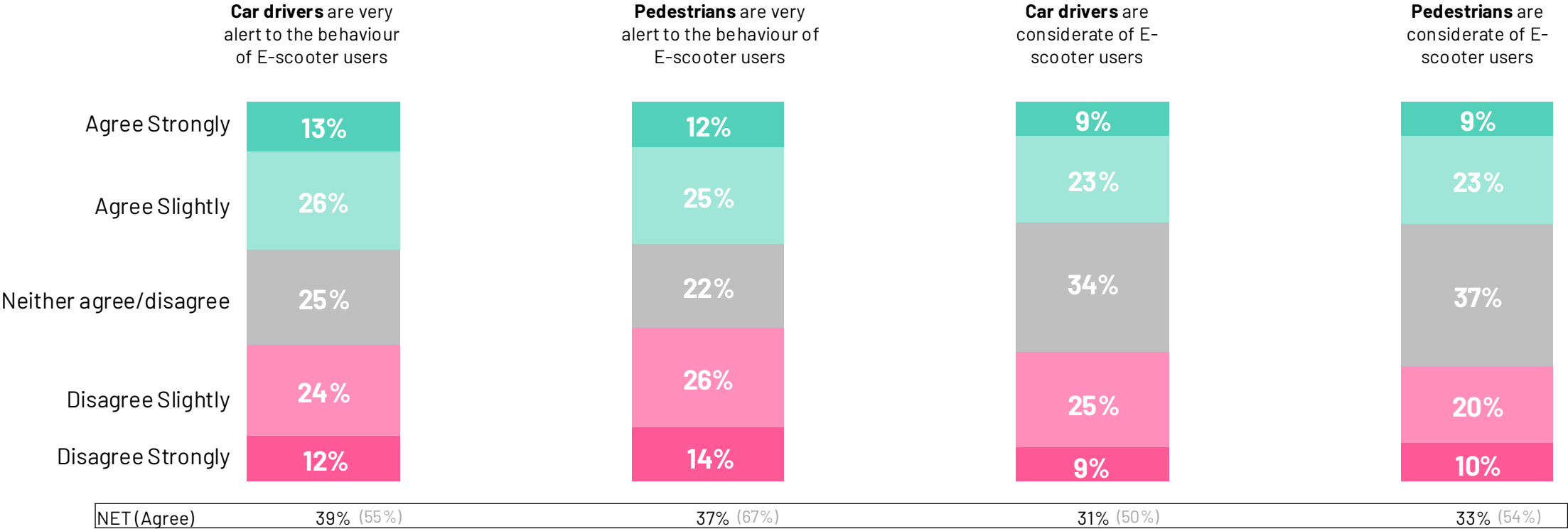
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() Regular E-Scooter users*
* Currently use E-Scooter daily, weekly or monthly



Perception of Behaviour Towards E-Scooter Users

Less than 4 in 10 adults agree that drivers or pedestrians are alert to or considerate of E-scooter users. Interestingly, regular users themselves are more likely to assess drivers and pedestrians as being alert and considerate to users.



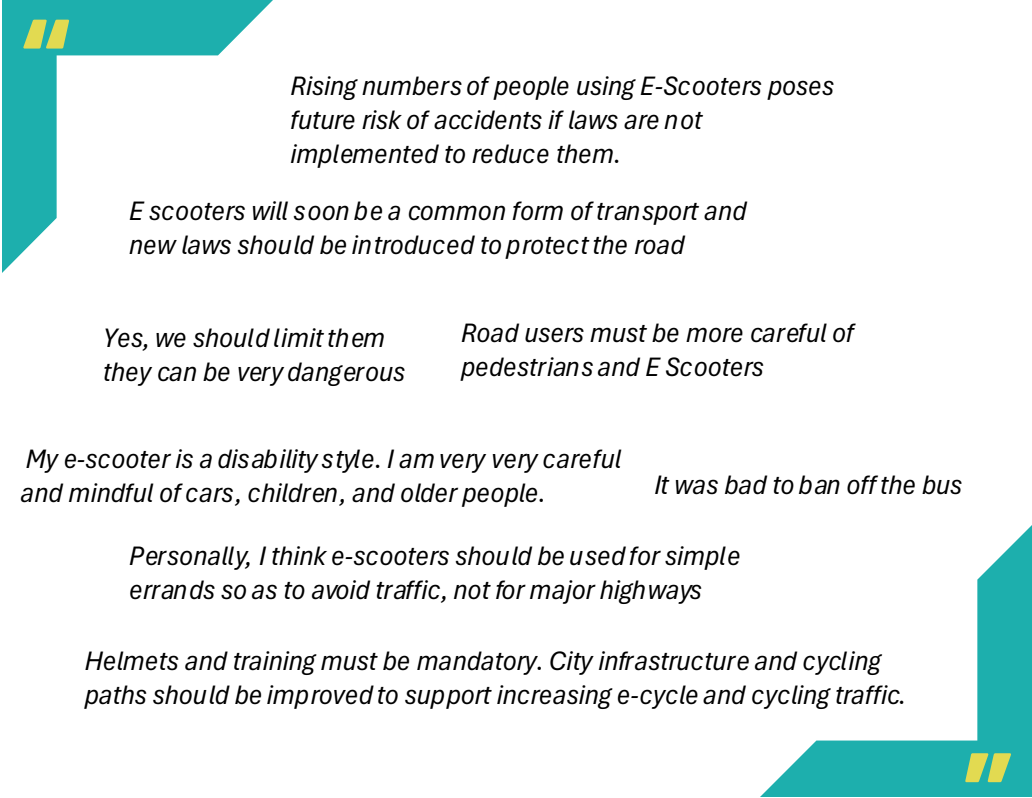
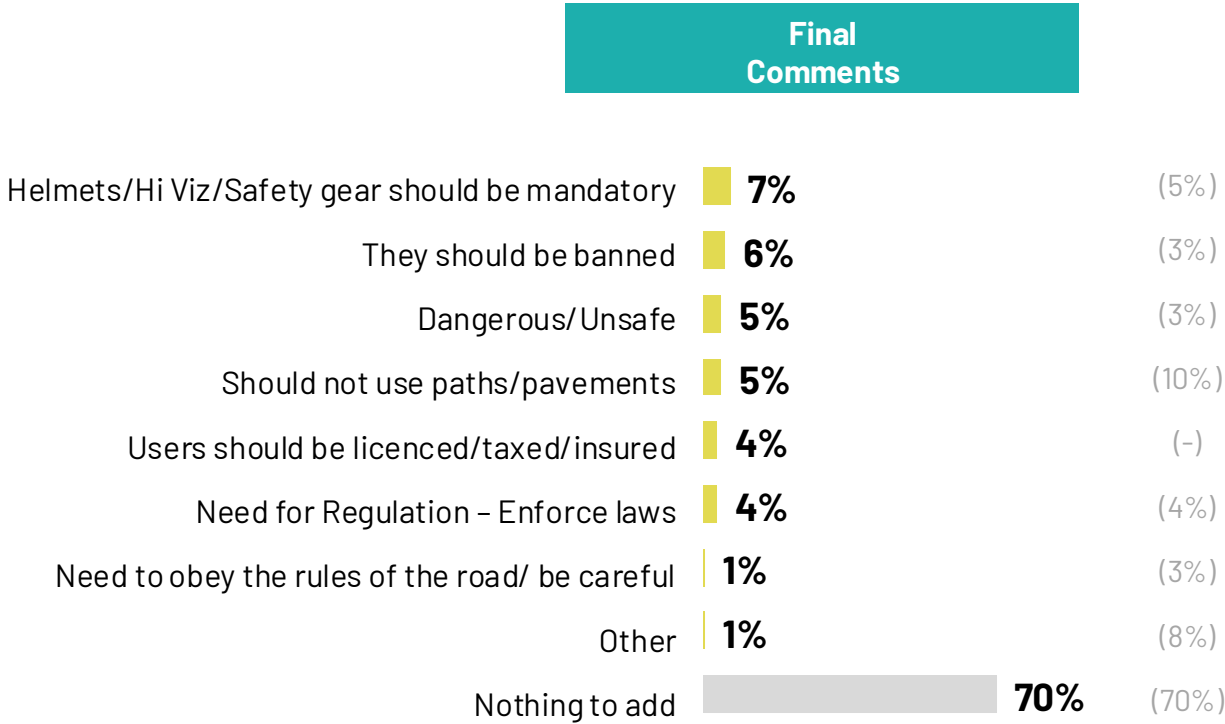
() Regular E-Scooter users*

* Currently use E-Scooter daily, weekly or monthly



Final Comments

Concluding comments primarily relate to regulations or outright banning



Q.17 Is there anything else on the use of E-scooters that you would like to share or comment on?

Base: All Adults N - 1254

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() Regular E-Scooter users*

* Currently use E-Scooter daily, weekly or monthly



KEY LEARNINGS

National Survey on E-Scooters 2024 – Key Learnings



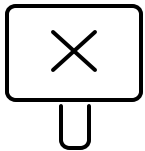
Current e-scooter usage is primarily a young adult and Dublin & Urban phenomenon. The research estimate is that e-scooter usage may triple in the next 12 months and prospective users are likely to accentuate the current user profile.



An unsettling 24% of current users (exclusively male) have already been involved in a road collision as an e-scooter user. In addition, 32% have been involved in a 'near miss'.



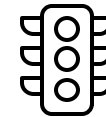
E-scooters are now considered the most dangerous transport mode (more dangerous than motorcycles). The perception of safety is vastly different among regular users (70% consider usage 'safe' versus 20% of all adults).



There are consistently high levels of criticism directed at E-scooter users across multiple criteria (and indeed the majority of E-scooter users are also often self-critical of their groups behaviour).



While awareness of the new legality of e-scooter use is strong overall, it extends to only 3 in 4 current users. Support for the new usage laws and potential rental regulations is typically very positive; however, only half the public feel the 20km/h speed limit is appropriate.



There is public scepticism on the effective enforcement of the new e-scooter laws. Regular users however consider it more probable that users will get caught by the police if they break these laws.

THANK YOU

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