Better BIKETOWN: A Shared Micromobility Program Business Model Study

Appendix: Public Input Survey

Between 1/15/26 and 2/15/26, the project team conducted an online public survey to gather feedback on the BIKETOWN system. A postcard with a link to the survey was mailed to 1,000 randomly selected addresses across the city. The survey link was also shared on PBOT's Instagram account and other professional networks, and paper copies were distributed to bike shops throughout Portland. Participants were entered into a raffle for a $50 gift card, and four winners were selected at random.

The survey received 1,602 total responses, including online and paper submissions, and generated 475 open-ended comments. An additional 56 comments from online sources and forums were compiled by the project team. response.

Key Findings

- Cost is the biggest factor influencing use, over 70% of current users said they would use BIKETOWN more if it were cheaper, and affordability ranked as the most important system attribute overall.
- Respondents said they would ride more if bikes were easier to find and located closer to where they travel.
- About 46% of respondents reported using shared micromobility in the past year, with bike-share being the most common mode.
- Most respondents (59%) preferred a mixed fleet; however out of respondents who used shared micromobility in the past year, a slight majority preferred e-bikes only (53%).
- Expanding the service area was more important to respondents who had not used shared micromobility recently.

Survey Results

In the last 12 months, have you used shared bicycles and/or scooters?

Respondents were first asked whether they had used shared micromobility (SMM) including shared bicycles or scooters, in the past 12 months. This question was intended to establish respondents' familiarity with shared micromobility

services and to group respondents for later questions about usage, preferences, and barriers.

Overall, 46.1% of respondents reported using some form of shared micromobility in the past year, while 53.9% reported using neither bike-share nor scooter-share. Among those who had used SMM, bike-share was the most common mode, with 23.1% of respondents reporting bike-share use only, followed by 16.2% who reported using both bike-share and scooter-share. A smaller share, 6.8%, reported using scooter-share only.

Figure 3: Responses to " In the last 12 months, have you used shared bicycles and/or scooters?"

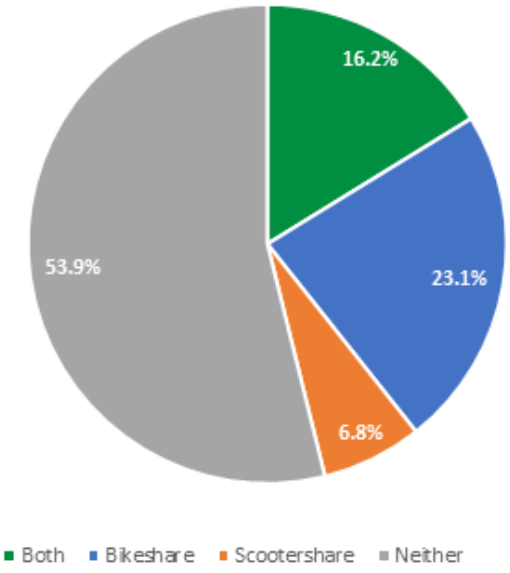


Table 2: Response to "In the last 12 months, have you used shared bicycles and/or scooters?"

Response	Number	Percent
Both	260	16.2%
Bike-share	370	23.1%
Scooter-share	109	6.8%
Neither	863	53.9%

Total	***1,602***	**-**

Reasons for Using or Not Using SMM

Based on their response to the question about whether they have used bike-share or scooter-share in the past 12 months, respondents were then asked what would encourage them to use bike-share more often if they currently use it, and why they do not use it if they are non-users.

Cost emerged as the most significant factor for both groups; the results show that over 70% of respondents said they would use BIKETOWN more if it were cheaper—nearly twice as many as those who said they would use it more if there were more bikes were available, the next most common.

Availability and convenience were also recurring themes among current users. About 31.8% of respondents said they would use bike-share more if bikes were located closer to places they travel, and 43.6% said they would use it more if there were more bikes available overall, highlighting the importance of system reliability and proximity to destinations. Smaller but still notable shares of respondents said they would use bike-share more if it were funded by their employer or school (27.9%) or if the bikes fit their size better (7.0%), see Figure 4 and Table 3.

Among respondents who do not currently use shared micromobility, the most common reason cited was already owning a personal micromobility device, such as a bike, e-bike, or scooter (46.8%). Personal safety concerns were also a major barrier, selected by 38.5% of respondents, indicating that comfort riding in traffic and the presence of safe infrastructure influence whether people choose to use shared systems. Other factors included price (23.7%) and availability (18.0%), suggesting that cost and system coverage also affect adoption among non-users, see Figure 5 and Table 4.

Overall, the findings suggest that improved bike availability, and better proximity to destinations would encourage greater use among current riders, while costs, safety concerns, and personal device ownership remain the most significant barriers preventing wider adoption.

Table 3: Responses to "What Would Make You Use Bike-share More?" (Past 12-Month SMM Users, by Mode)

Response	**Respondents who have used _____ in the past 12 months**

	Scooter-share		Bike-share		Both		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
If it were cheaper	60	57.1%	264	72.1%	186	71.8%	**510**	**69.9%**
If it were closer to places I travel	39	37.1%	103	28.1%	90	34.7%	**232**	**31.8%**
If it was funded by my employer or school	27	25.7%	104	28.4%	73	28.2%	**204**	**27.9%**
If the bikes fit my size better	9	8.6%	20	5.5%	22	8.5%	**51**	**7.0%**
If there were more bikes available	25	23.8%	167	45.6%	126	48.6%	**318**	**43.6%**
Other (please specify)	30	28.6%	100	27.3%	72	27.8%	**202**	**27.7%**
Total	***105***	**-**	***366***	**-**	***259***	**-**	**730**	**-**

Figure 4: Responses to "What Would Make You Use Bike-share More?" (Past 12-Month SMM Users, by Mode)

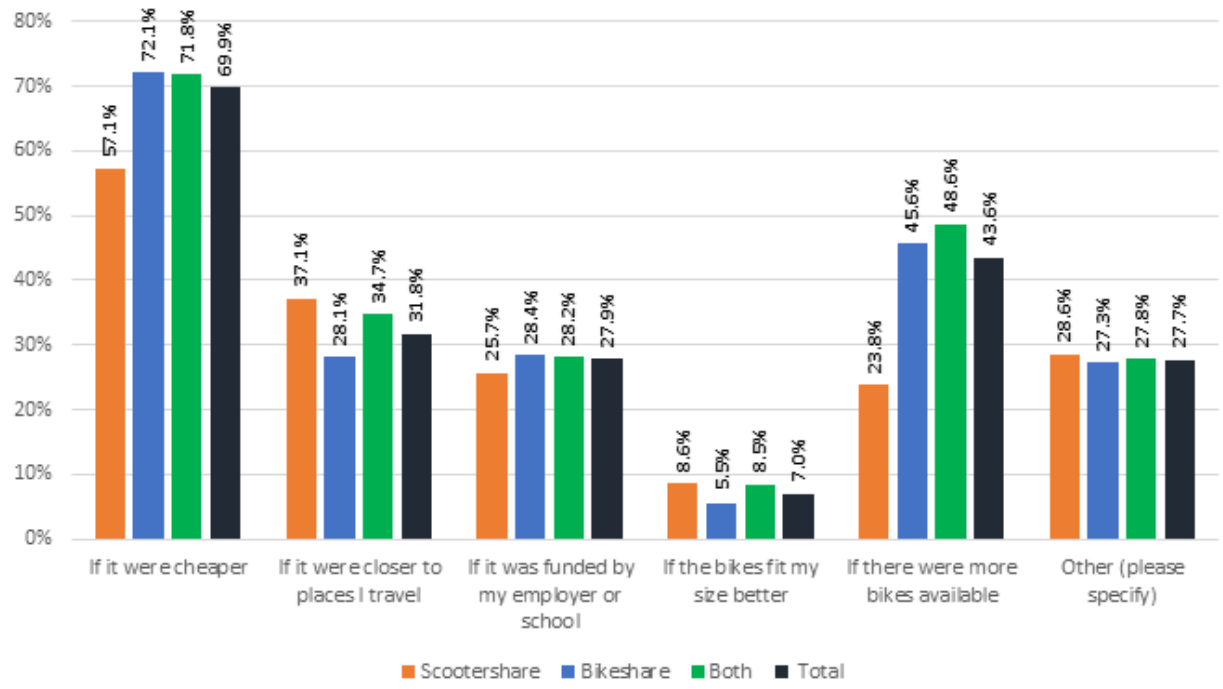
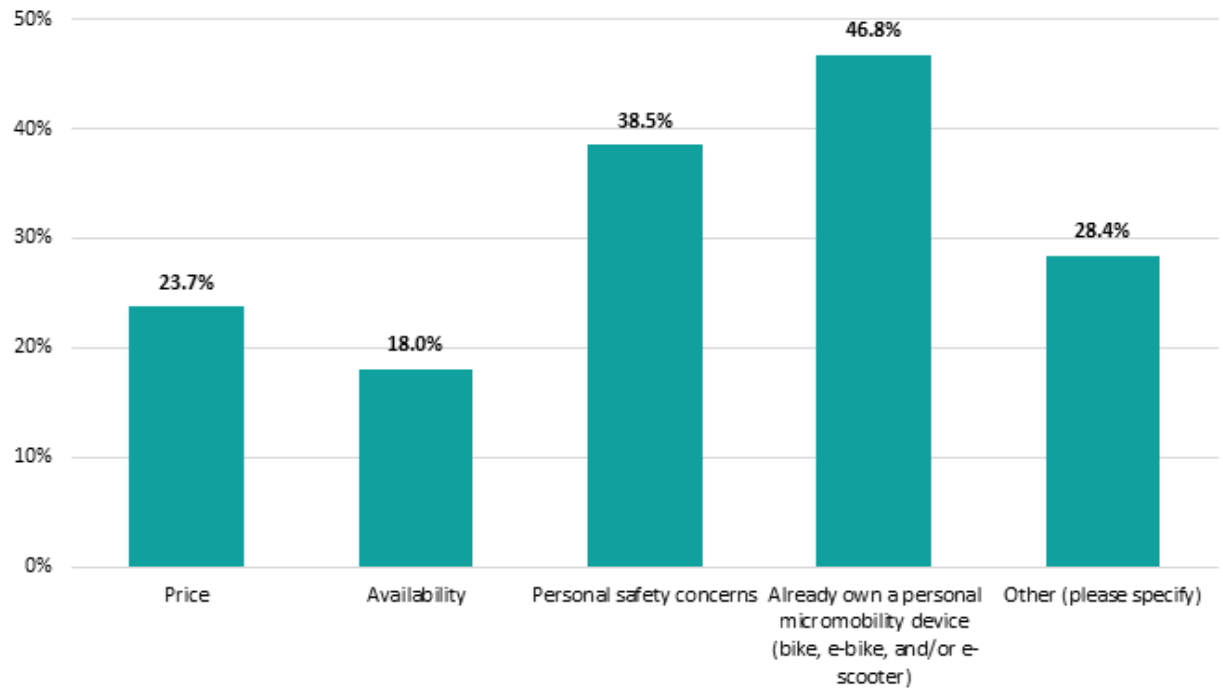


Table 4: Responses to "If you don't use bike-share, why not?":

Response	Number	Percent
Price	204	23.7%
Availability	155	18.0%
Personal safety concerns	331	38.5%
Already own a personal micromobility device (bike, e-bike, and/or e-scooter)	402	46.8%
Other (please specify)	244	28.4%
Total	***859***	**-**

Figure 5: Responses to "If you don't use bike-share, why not?"



What is most important to you about SMM?

Respondents were then asked to rank what is most important to them about BIKETOWN, bike-share, and/or scooter-share? The survey asked participants to prioritize six factors, including affordability, proximity of vehicles, bike availability, service area size, vehicle types, and incentive programs, with 1 representing the highest priority and 6 representing the lowest priority. The results shown in Table 5 represent the average ranking across all responses, meaning that lower numbers indicate higher importance.

Overall, affordability emerged as the most important factor across all respondents, including both those who had used shared micromobility within the past six months and those who had not. With an average ranking of 2.1 overall, affordability was consistently rated as the top priority among all groups. This suggests that cost is a primary consideration shaping how people evaluate the usefulness and accessibility of the system.

Proximity of bikes or scooters ranked second for both groups, with an average ranking of 2.4, indicating that convenience and ease of access are also key priorities. Bike availability, meaning whether bikes are present when users arrive at a station, ranked third among both groups with an average ranking of 3.3. These findings suggest that respondents value a system that is affordable, convenient, and reliable when they need it.

Increasing the mix of vehicle types (such as adding more e-bikes or pedal bikes) and offering additional incentive programs all ranked lower on average. Notably, while expanding the service area ranked lower overall, it was relatively more important to respondents who had not used shared micromobility in the past six months (average ranking 4.2) compared with recent users (average ranking 4.8). This suggests that system coverage may be a barrier for potential users.

Table 5: Responses to "What is most important to you about BIKETOWN, bike-share, and/or scooter-share?"

What is most important to you about BIKETOWN, bike-share, and/or scooter-share? Please rank these options.	**Average Ranking**		
	All Respondents	**Respondents who have used SMM in the past 12 months**	**Respondents who have NOT used SMM in the past 12 months**
Affordability	2.1 (Highest)	2.0 (Highest)	2.2 (Highest)
Proximity of bikes and/or scooters, i.e., closer station location	2.4	2.5	2.4
Better bike availability (more bikes)	3.3	3.1	3.4
Larger service area	4.2	4.8 (Lowest)	4.2
Bigger mix of bikes (e-bikes and pedal bikes)	4.5	4.5	4.6 (Lowest)
More incentive programs	4.5 (Lowest)	4.1	4.2

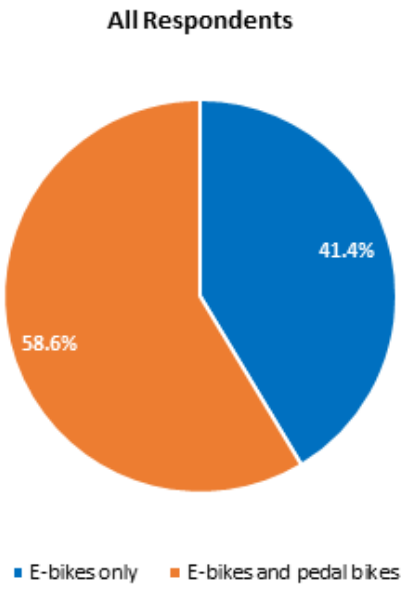
Would you prefer e-bikes only or a mix of e-bikes and pedal bikes?

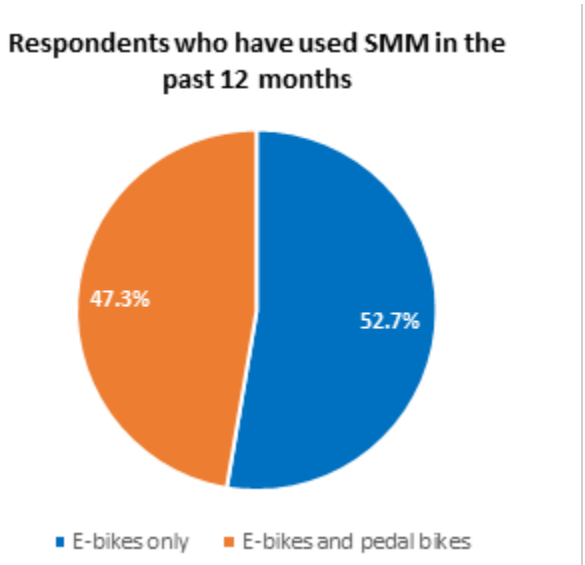
Respondents were asked whether they would prefer the system to offer e-bikes only or a mix of e-bikes and pedal bikes. 58.6% of respondents preferred a mix of e-bikes and pedal bikes, while 41.4% preferred e-bikes only. However, preferences differed notably between recent shared micromobility (SMM) users and those who had not used the system in the past six months.

Among recent SMM users, responses were relatively split, with a slight preference for e-bikes only (52.7%) compared with 47.3% who preferred a mix of bike types. In contrast, respondents who had not used SMM in the past year showed a strong preference for a

mixed fleet, with 70.1% favoring a combination of e-bikes and pedal bikes and 29.9% preferring e-bikes only, see Table 6 and Figure 6.

Figure 6: Responses to "Would you prefer e-bikes only or a mix of e-bikes and pedal bikes?"





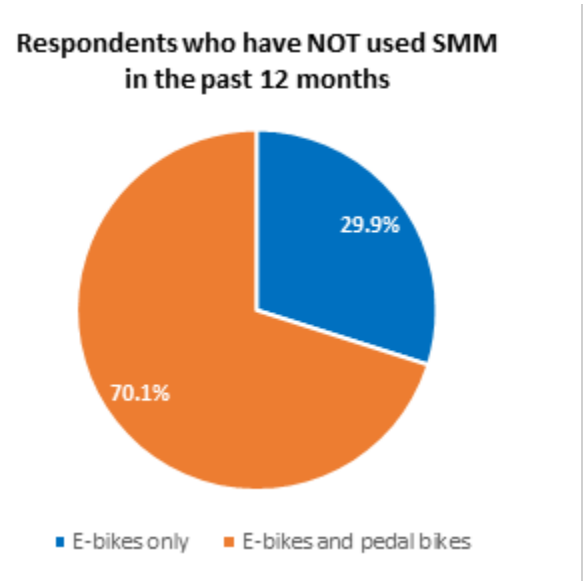


Table 6: Responses to "Would you prefer e-bikes only or a mix of e-bikes and pedal bikes?"

Response	Respondents who have used SMM in the past 12 months		Respondents who have NOT used SMM in the past 12 months		All Respondents	
	Number	Percent	Number	Percent	Number	Percent
E-bikes only	375	52.7%	209	29.9%	584	41.4%
E-bikes and pedal bikes	337	47.3%	490	70.1%	827	58.6%

Total	***712***	**-**	***699***	**-**	***1,411***	**-**

Open-Ended Responses

Across the open-ended responses, a few clear themes stood out. Similar to the survey responses, cost is the clearest and most consistent barrier and motivator: people said they would ride more if prices were lower, passes were simpler, or employer subsidies were available. This is consistent with the 71% who said they'd use BIKETOWN more if it were cheaper.

A selection of comments are provided below:

Open ended:

- "I visit Portland a couple times a year, and occasionally I would like to replace one of my car trips with a different mode like bus or micromobility. But the last time I tried to use Biketown, it did not lend itself to use by an infrequent user – I think it required a reoccurring membership fee, and I also struggled with getting access because of a lengthy account set-up process. I thought it might be as simple as downloading an app on my phone and loading funds, like I have done with TriMet, but it's much more involved. So for the past couple of years, I just don't try, and I drive when I visit Portland."
- "This is one of the factors that convinced me to buy my own ebike. Even with a subscription (ugh) it doesn't pencil out anywhere close to just getting your own ebike."
- "One of the best things they could do is allow a short ride on them with purchase of TriMet ticket. Sometimes a bad bus transfer means an extra 20 minutes, even when one leg of the trip is pretty short."
- " I LOVE shared mobility services, but BIKETOWN is ridiculously expensive. Anytime I mention to a friend or someone about using them, the cost becomes a huge barrier."

If no, why don't you use it?

- "Its too expensive. I miss the non-electric bikes."
- "The biggest thing I want to see is clear signage that scooters and bikes do not belong on sidewalks."
- "Current programs offload transportation needs to corporate vendors (like Nike bikes, or Lime scooters, etc.). I view this sort of transit as a public service, and I do

not believe this is the right direction for our city. Reliance on “rideshare” corporations devalues our public infrastructure and will continue to exacerbate ridership declines for Trimet. We need to invest in low-cost public transit or support truly local bike/scooter companies rather than corporate interests.”

- “Concern for my own safety (no helmet, too fast, no designated lane/pathway), and concern for others' safety (riding on sidewalk is where I feel most comfortable, but pedestrians can't hear the device and it's not safe for them).”

If yes, what would make you use it more?

- “If I could take my kid or stuff”
- “If all the e-bikes were the higher quality 2nd Generation models”
- “As a disabled person, have more bikes throughout the city. Two bike docks near my house were removed for cars and it has been a hardship for me. And with the bike parking gone, cars drive faster on the Greenway”
- “More docking stages and unlimited rides or flat fee for half hour like other bike-share systems”
- “If fares were integrated with TriMet”

Who took the Survey?

Respondents were also asked a series of optional demographic questions to better understand who participated in the survey and to provide context for interpreting the results. These questions included racial or ethnic identity, languages spoken at home, gender identity, disability status, and household income, see Table 7 through Table 11.

Table 7: Responses to "Which of the following describes your racial or ethnic identity?"

Response (Check all that apply)	Total	Total (%)
American Indian or Alaska Native	24	2%
Asian	71	6%
Black or African American	27	2%
Latinx or Hispanic	71	6%
Middle Easter/North African	12	1%

Native Hawaiian or Pacific Islander	11	1%
White	1,015	88%
Not listed above, please describe	1	0%
Answered	*1,156*	*100%*
Skipped	*446*	

Table 8: Responses to "Language(s) spoken or signed at home"

Language(s) spoken or signed at home: (Check all that apply)	Total	Total (%)
American Sign Language (ASL)	12	1.1%
Cantonese (中文)	6	0.5%
Chuukese (tʃuːˈkiːz)	2	0.2%
English	1,107	98.2%
Mandarin (普通话)	7	0.6%
Nepali (नेपाली)	2	0.2%
Romanian (Română)	4	0.4%
Russian (Русский)	8	0.7%
Somali (Soomaali)	2	0.2%
Spanish (Español)	61	5.4%
Ukrainian (Українська)	5	0.4%
Vietnamese (Tiếng Việt)	6	0.5%
Other (please specify)	1	0.1%
Answered	*1,127*	*100.0%*
Skipped	*462*	

Table 9: Responses to "Which of the following options most closely aligns with your gender?"

Response	Total	Total (%)
Gender Expansive (e.g., non-binary, agender, gender fluid, genderqueer)	69	6.1%
Man	547	48.5%
Transgender	8	0.7%
Trans man	8	0.7%
Trans woman	8	0.7%
Two spirit	5	0.4%
Woman	474	42.0%
I am undecided and/or questioning	9	0.8%
I prefer to describe my gender	10	0.9%
Answered	*1,128*	*100.0%*
Skipped	*451*	

Table 10: Responses to "Do you identify with having or living with a disability?"

Response	Total	Total (%)
Yes	205	17.9%
No	895	78.2%
I prefer not to disclose	44	3.8%
Answered	*1,144*	*100.0%*
Skipped	*445*	

Table 11: Responses to "What is your total household income?"

What is your total household income?	Total	Total (%)
Under $15,000	59	5.3%
Between $15,000 and $29,999	61	5.5%
Between $30,000 and $49,999	116	10.4%
Between $50,000 and $74,999	152	13.7%
Between $75,000 and $99,999	180	16.2%
Between $100,000 and $150,000	257	23.1%
Over $150,000	288	25.9%
Answered	*1,113*	*100.0%*
Skipped	*476*	

Survey Data

In the last 12 months, have you used shared bicycles and/or scooters?	Total	Total (%)
Both	260	16.2%
Bikeshare	370	23.1%
Scootershare	109	6.8%
Neither	863	53.9%
Total	*1,602*	*100.0%*

If yes, what would make you use it more? Choose all that apply.	Total	Total (%)
If it were cheaper	511	69.7%
If it were closer to places I travel	233	31.8%
If it was funded by my employer or school	205	28.0%
If the bikes fit my size better	52	7.1%
If there were more bikes available	320	43.7%
Other (please specify)	209	28.5%
Answered	*733*	*100.0%*
Skipped	*869*	

If **no, why not? Choose all that apply.**	**Total**	Total **(%)**
Price	**204**	**23.7%**
Availability	155	18.0%
Personal safety concerns	331	38.5%
Already own a personal micromobility device (bike, e-bike, and/or e-scooter)	402	46.8%
Other (please specify)	244	28.4%
Answered	859	100.0%
Skipped	*743*	

Would **you prefer e-bikes only or a mix of e-bikes and pedal bikes?**	**Total**	Total **(%)**
E-bikes only	**584**	**41.4%**
E-bikes and pedal bikes	827	58.6%
Total	1,411	100.0%

Which **of the following describes your racial or ethnic identity? Please check all that apply.**	**Total**	Total **(%)**
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