
Micromobility's Opportunity Era

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Executive Summary

Micromobility (MM) risks the fate of other disruptive industries that underinvested in public affairs — and were crippled by politicians as a result. The gaps in Other sectors' mis-steps have included: ineffective campaigns at the local level, lack of supportive coalitions, staff without government experience, and not showing officials how supporting MM is politically safe *and* beneficial.

Among the approaches MM should consider: Consistently using social media to flag riders on pending policy decisions that affect them, drive calls to action using segmented data, and engage riders in taking “microactivism” steps from their phones.



“I don’t think our roads are ready for this.”

Los Angeles ER Doctor Tarak Trivedi, [Associated Press](#), 7/1/19

“The ‘move fast and break things’ era is over.”

Hemant Taneja, [Harvard Business Review](#), 1/22/19

Introduction

Our firm has conducted in-depth communications analysis* of the marketing and public affairs landscape for several disruptive, clean economy sectors.

For me (Mike), charting the success path for MM is personal and professional. As a frequent e-scooter customer, I also ride my [Onewheel](#) to business meetings. I’ve seen firsthand how this new sector is helping to cut pollution, make cities more livable and acculture millions to no-car transit options that aren’t behind a steering wheel. MM is perfectly suited to shifting the mindset of millions of consumers, an

absolute necessity for driving many of the big changes required to address global climate disruption.

But as an MM user, I also experience how infrastructure gaps and outdated policies act as a drag on MM’s growth. As MM execs told us, safety concerns drive local bans and restrictions far more than public nuisance complaints about scooters and bikes left in pedestrians’ way. At the heart of MM’s challenge is a deadly formula we’ll call the Micromobility Drag Coefficient:



*During the production of this analysis, Tigercomm conducted all research while having no clients or conflicts in the MM sector.

It's up to MM companies to strengthen their case to operate within current infrastructure, but also to promote the steps for safer riding. That will require public communications far more sophisticated than what young companies can typically muster.

This book combines our findings with a condensed set of lessons from other clean economy sectors. We want to offer MM companies recommendations that are specifically adapted to their distinct assets and challenges.

For the biggest MM players, we're seeking to gently challenge their practices, which are evolving quickly enough that some of our analysis will be obviated when they read this. For the younger, smaller companies, the available lessons might have to be applied as their growth continues.

Why Pandemic + Recession = Better Timing For This Book

We spent more than a year developing this book. It was close to final form just as the pandemic hit the pause button on micromobility companies' rapid growth. As cities begin re-opening, it seemed like the right time to publish it. Why?

Because the case for the micromobility (MM) will emerge stronger after the pandemic for several reasons. **It's a cheaper form of last-mile travel than (car) ride hailing.** And, the several months of lessened traffic showed city dwellers the upsides getting from place to place without being encased in glass and steel. Most importantly, the recovery from the global recession is an opportunity for cities to re-think the urban infrastructure that was originally designed to accommodate cars.

The time for making the case for more dedicated space for bikes and scooters is here. Our goals for this analysis is to help MM companies realize the opportunity of this moment.



Micromobility Coalition
@MicroMoCo

▼

New @OECD report: Riding an #escooter is no more dangerous than riding a bike. Shifting from cars to #micromobility could make cities safer for all travelers. Read more about the report's findings here=>



Electric scooters could make cities safer, report claims
Riding an electric scooter is no more dangerous than riding a bike and their use could make cities safer, according to a new report.
[telegraph.co.uk](https://www.telegraph.co.uk)

4:44 PM · Feb 20, 2020 · [Twitter Web App](#)



The Limits of “Move Fast and Break Things”

In working for over 140 clients in the clean economy, we've met plenty of founders who launched their companies to solve people's problems. We've never met any who started their company to please politicians.

But we've helped plenty of founders who wished they'd invested earlier and more heavily in managing the reality of being locally regulated by politicians. These founders learned the hard way that running afoul of local elected officials will hurt a company... or even kill it.

A lot of dynamic clean economy companies, particularly those started in northern California, are born into the tech ethic of [“Move Fast and Break Things.”](#) While that approach can help drive short-term growth, it begs for major restrictions on locally regulated companies. It steers companies into an iceberg field of angry city and county officials, many of whom still suffer from “the Uber hangover,” left by that company's confrontational, forgiveness-later approach to market expansion.

As Alison Griswold wrote in [Quartz](#): “‘Move fast and break things’ has long been the tech way, but it no longer appears to be working.” The Quantified VC said in [Medium](#): “Don't be fooled into thinking that breaking stuff is inherently good. It's not.” Our analysis of MM public affairs outputs and the controversies they work to address reveals a mixed bag.

The bad news is the companies' respective communications programs still function more like lightly regulated tech companies than locally regulated cable companies.

The good news is two-fold: First, some MM companies are evolving and advancing their PA operations. Bird signed former Consumer Product Safety Commission Chair David Strickland, a former governor and six-term Congressman. Lime convened its [first safety summit](#) last summer, and the company hired long-time Google public affairs executive [Adam Kovacevich](#).



“Don't be fooled into thinking that breaking stuff is inherently good. It's not.”

Second, the unhappy path of other sectors into growth-constraining public affairs problems is avoidable. It's also rich in usable lessons that can save MM companies money and heartache:

- 1 As part of the business plan, invest in Tier-1 public affairs programs at scale, right from the start.
- 2 Solve for the reality that the current field of MM companies remains under-distinguished, enabling one company's problems to become the problems of others.
- 3 There's a first-definer advantage awaiting the company that first sets the bar for ethical, mutually beneficial partnership with local officials.
- 4 In engaging local officials, deliver political safety first, then political *benefits* second.

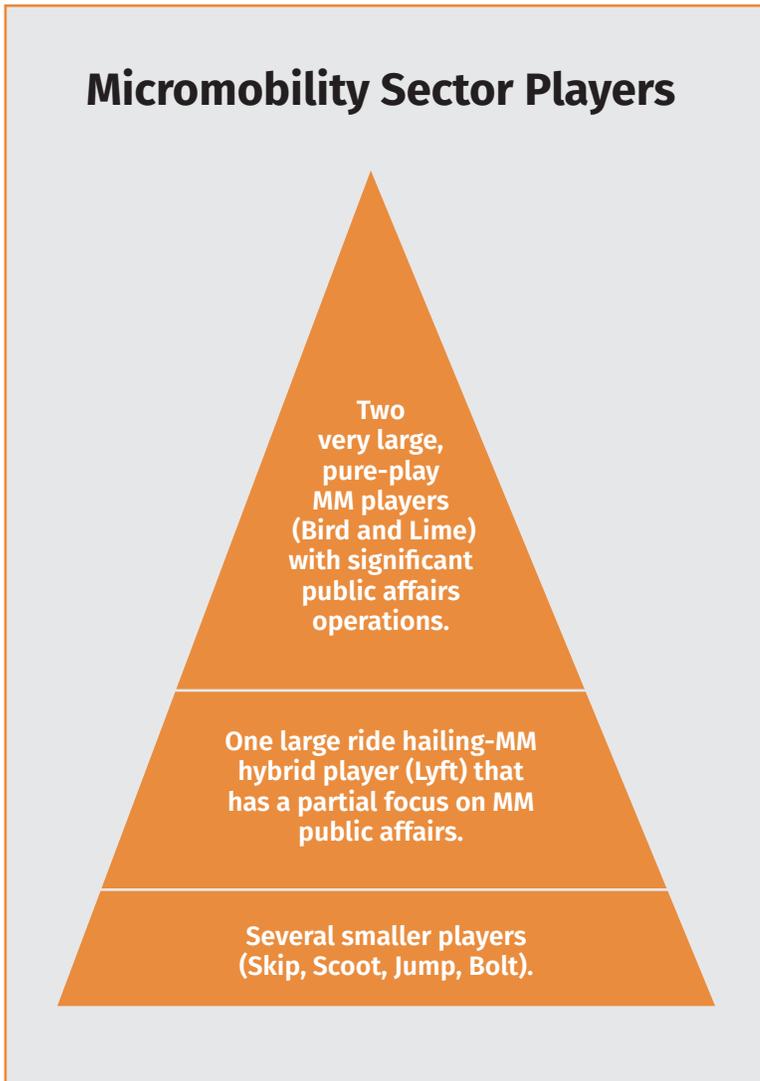
- 5 Build extensive validation from third-party allies.
- 6 Use rider data to segment by their willingness to advocate for MM. Custom-communicate with different rider cohorts through the companies' respective rider apps and social platforms.
- 7 Mobilize riders to take small, additive steps to push for fair treatment for MM by local officials. We'll call that idea "micro-activism."

We titled this book "MM's Opportunity Era," because we think the companies will continue to grow and succeed— see Adam Kovacevich's compelling adaptation curve for how cities accept MM [here](#). However, there's still significant money to be saved from avoiding the collective experience of solar, onshore wind, residential **PACE** lending and home-sharing companies.

The unhappy path of other sectors into growth-constraining public affairs problems is avoidable. It's also rich in usable lessons that can save MM companies money and heartache.



Methodology



We took the following steps:

- Conducted seven months of interviews.
- Measured two rounds of companies' online footprints.
 - In both rounds, we reviewed several months, local media coverage of industry leaders Bird and Lime, and the social media output of two pure-play MM companies, Skip and Spin.
 - Scoot was originally measured but was acquired by Bird mid-2019.
- To capture changes in content and tone, we measured December 2018-April 2019, and again from May 2019-July 2019.
- In early 2020, we re-evaluated these players' messaging throughout the end of 2019 and found that the trends continued.
- We also reviewed the communications from Bolt, a relatively new player in the sector that grew in prominence last year.
 - As a newer entrant into the market, we had not tracked Bolt in the first round of measurements, as it has only recently developed a social media presence.



Landscape

Exploding ridership growth will continue driving city restrictions and bans

For many fans of MM, it's hard to imagine scooter and bike companies getting stopped in their tracks by local officials. Pre-pandemic, ridership was exploding among a wide cross-section of people seeking fun, inexpensive, last-mile transit.

But as other sectors have learned, local regulations can be costly constraints on growth, even if they aren't fatal.

Industry executives we interviewed were unanimous in naming safety as the main driver of local officials' concerns. [Science Daily reported](#) that, "The number of scooter-related injuries and hospital admissions in the United States grew by 222 percent between 2014 and 2018 to more than 39,000 injuries."

The growing safety problem has attracted what Bird's, David Strickland describes as the "[outsized attention e-scooter injuries have garnered in the media.](#)" The result was a first-ever "[injury study](#)" by the [City of Austin](#), an analysis by Consumer Reports and a newly formed coalition of city officials to develop safety guidelines.



"[Scooters] have caused some headaches and have insurance implications for consumers, municipalities and insurance companies."

National Association of Insurance Commissioners

"Approximately one to two major traumatic brain injuries a month are admitted to the trauma center. The reason is simple. Who's carrying a helmet? No one. No one is wearing them because no one is carrying them."

Dr. Oscar Guillamondegui, trauma ICU medical director at Vanderbilt University Medical Center in Nashville.

"Safety requirements for rentable scooters are based on an honor system."

Jordan Harlan, Attorney Harlan Law in San Diego



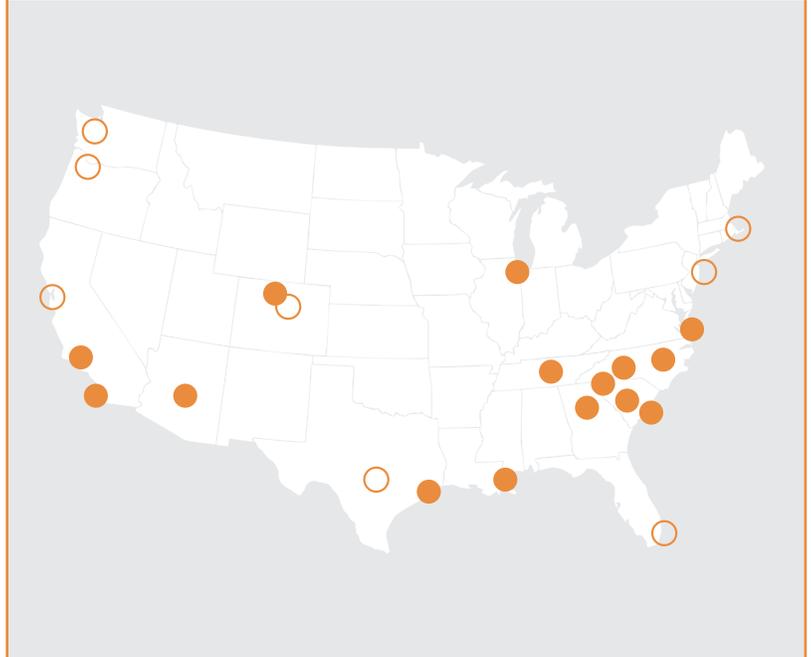
As other sectors have learned, local regulations can be costly constraints on growth, even if they aren't fatal.

There are at least 18 externally towns with the Micromobility Drag Coefficient at play.

Table Of Restrictions

Atlanta, GA Evening riding ban
Boston, Cambridge, Somerville, MA Banned, legislation stalled
Brookline, MA Banned after pilot
Boulder, CO Complete ban
Charlotte, NC Street-specific restrictions
Chattanooga, TN Temporary ban
Chicago, IL Pilot ended, but reintroduction possible
Columbia, Greenville, Charleston and Rock Hill, SC Complete bans
Nashville, TN Fleet reduction, ban threatened
Phoenix, AZ Complete ban
Raleigh, NC Lime and Bird de facto banned
San Antonio, TX Fleet reduction
Virginia Beach, VA Scooters restricted from waterfront area

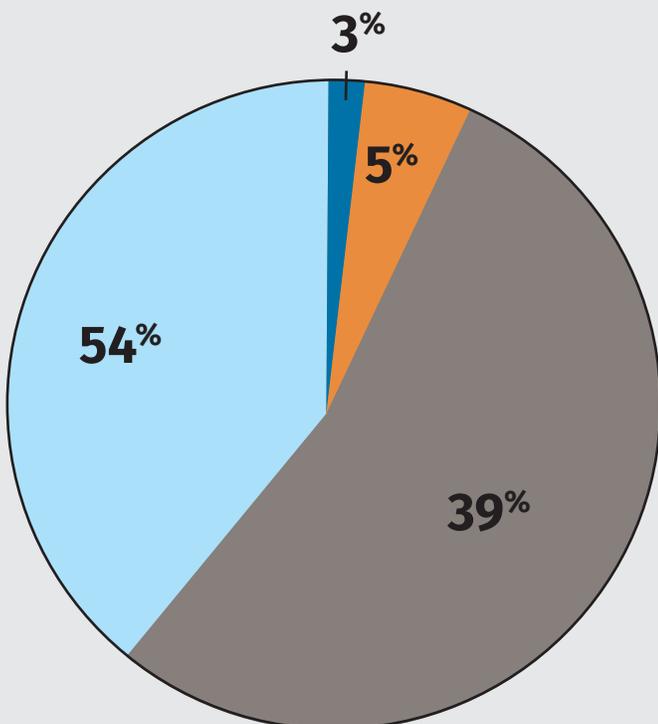
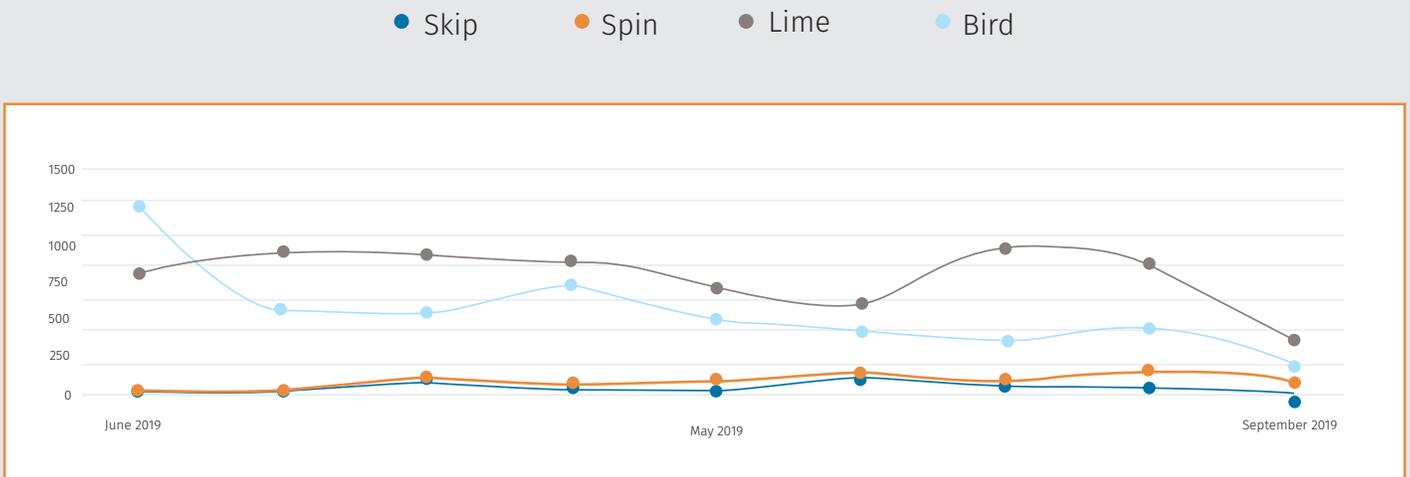
Risk In Range Of Markets Across Country



- | | |
|---|---|
| <p>● Bans or Restrictions</p> <ul style="list-style-type: none"> Atlanta, GA Boulder, CO Charleston, SC Charlotte, NC Chicago, IL Chicago, IL Columbia, SC Greenville, SC Houston, TX Los Angeles, CA Nashville, TN New Orleans, LA Raleigh, NC Phoenix, AZ San Diego, CA Virginia Beach, VA | <p>○ Problematic Pilots</p> <ul style="list-style-type: none"> Austin, TX Brookline, MA Chicago, IL Denver, CO Hoboken, NJ Miami, FL Portland, OR Seattle, WA San Francisco, CA |
|---|---|

Competitive Analysis

When we compared market leaders, Lime and Bird, we found that local news media referenced “the scooter companies” far more than they distinguished the individual companies. In various measurements, counts of the word “scooter” occurred far more frequently than any of the actual companies’ names. Articles mentioning one scooter company often mentioned others as well.



- We reviewed all traditional media mentions “Lime Scooters,” “Bird Scooters,” “Skip Scooters,” and “Spin Scooters” for January - August 2019
- Lime, Bird dominate media coverage
- Skip, Spin growing their relative share
- Sampling of coverage shows media treats all scooter companies interchangeably
- Coverage tends to mention multiple scooter companies in similar contexts

Use of digital properties doesn't reflect an emphasis on public affairs outcomes

We (Nat), spent several weeks drilling down on a core infrastructure gap – the passive treatment of rider data in public affairs programs. Nat reviewed, categorized and counted the digital content output of the major MM players on their respective platforms.

It's worth noting that while we focused on Lime, Bird, Scoot and Skip, three companies weren't accounted for:

- Lyft's MM and ridesharing content weren't separable.
- Bolt emerged into the sector between the two rounds of analysis.
- Scoot was bought by Bird before our second round of analysis. As a result of the sale, Scoot's digital output dwindled as we conducted the count.
- Lime acquired Jump after our analysis was completed.

Categorizing Digital Content

Lime Retweeted
TechCrunch @TechCrunch · Feb 21
 Lime hires its first CFO [tcn.ch/2tz1aYy](https://techcrunch.com/2019/02/21/lime-hires-its-first-cfo/) by @meganrosedickey



Lime hires its first CFO
 Lime is hiring Ted Tobiason, former managing director in tech equity capital markets at Morgan Stanley, to serve as its chief financial officer. This co...

Public Affairs/Call to Action

Lime @limebike · Feb 19

This past month, the city of Seattle closed the Alaskan Way Viaduct. To commemorate the closure, our Lime Seattle team sponsored one final ride through the Viaduct prior to its demolition to make way for the new SR99 Tunnel! #limelife



Company News

Lime @limebike · Feb 25

Because it's not just about what you see in the daylight, it's also about what you see when the sun goes down. #limelife



Product Marketing

Lime @limebike · Jan 7

Want to bring Lime to your city? Sign the petition! ❤️

SNK21 @Legozocker21
 I want @limebike bikes and scooters in my town! Sign the petition to help us bring them here: p2a.co/PuIA0IA

Community Issues/Events

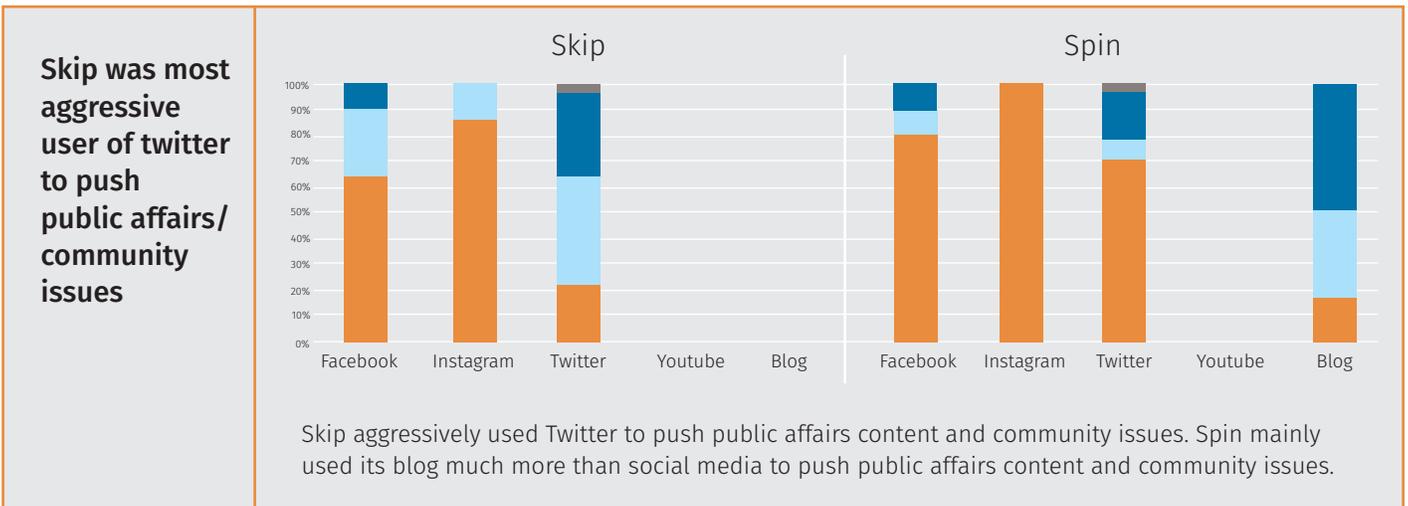
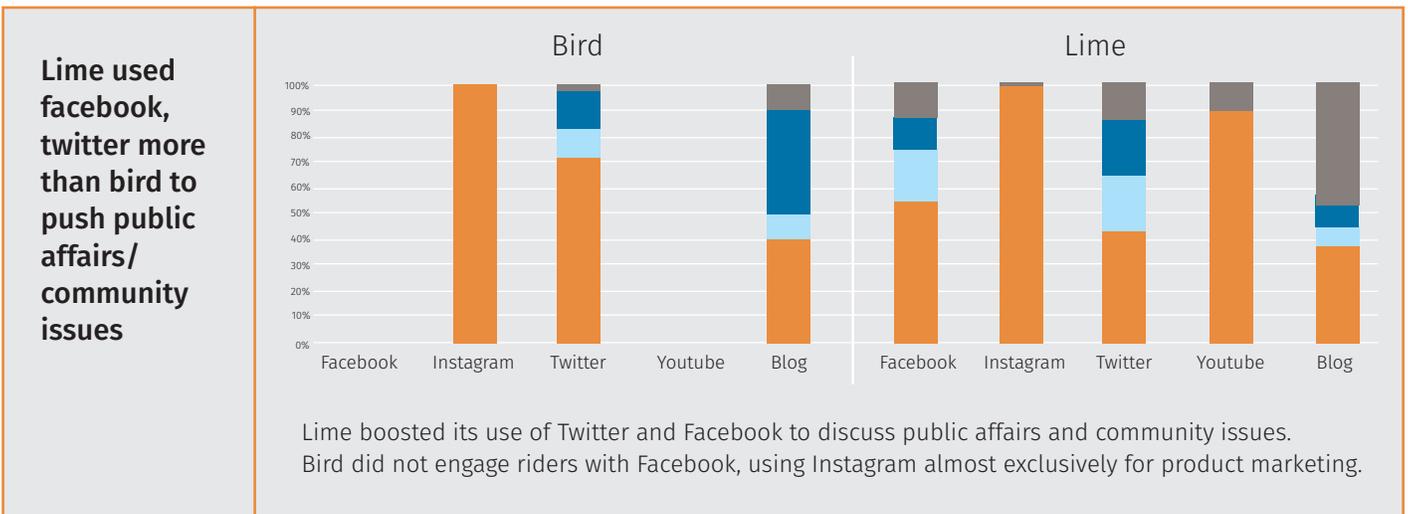
The overall data showed a set of companies placing heavy digital emphasis on product promotion, and little on lifting the expensive local regulatory constraints the companies' say is their main growth constraint.

In particular, we observed:

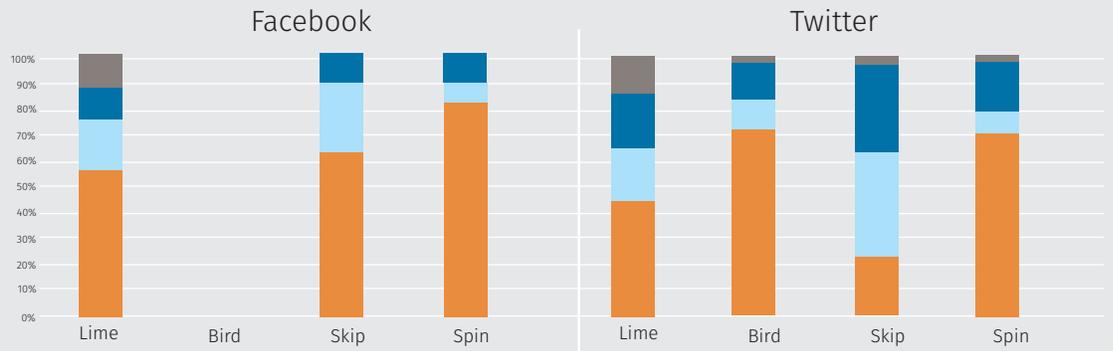
- 1 Public affairs content usually stopped short of any call to take a particular action.
- 2 In most public affairs posts, it was unclear what specific outcome was being sought — and from which city.
- 3 A substantial share of those posts encouraged local leaders to improve infrastructure for scooters, with the remainder generally touting MM's ability to ease pollution and congestion.
- 4 There was little effort to deliver both political safety and political benefit to officials.

Here are the tables on which we base those observations:

■ Product Marketing
 ■ Community Issues/Events
 ■ Public Affairs/Call to Action
 ■ Company News

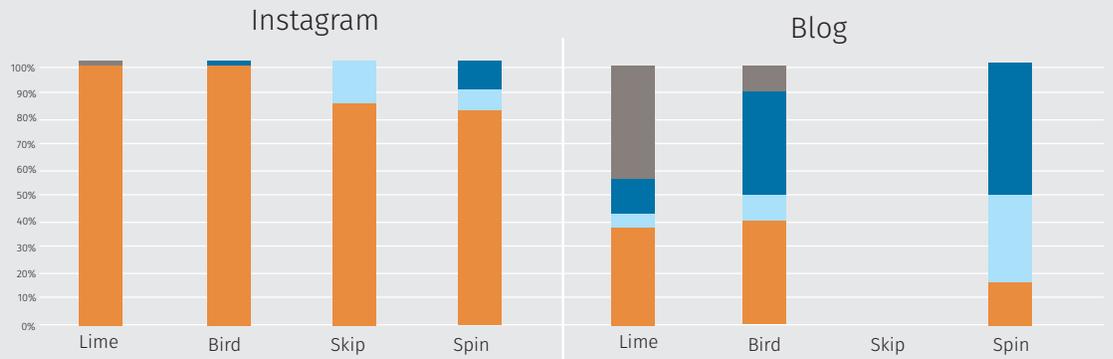


Bird trailed competitors in its use of social media to push public affairs/ community issues



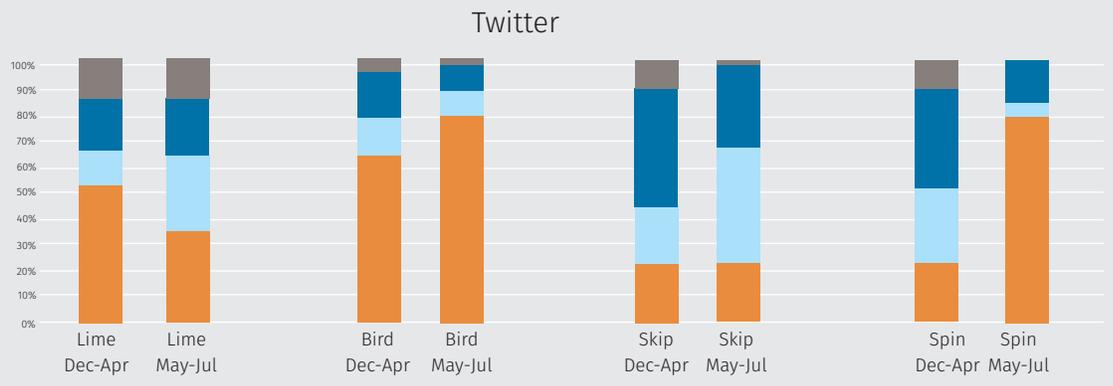
While Lime stepped up its use of social media to discuss public affairs and community issues. Bird did not engage the public with Facebook.

Opportunity to refocus instagram on public affairs and community issues



Most companies used Instagram almost exclusively for product marketing. Blogs usage favored public affairs at Bird and Spin, and company news at Lime. Blog usage was uneven across companies, and relatively low content volumes.

Bird, skip, spin all decreased portion of Twitter activity on public affairs



Lime slightly increased portion of Twitter activity spent on public affairs. Competitors substantially cut their public affairs focus.

Uneven Levels Of Public Engagement On Social Media

Companies each punched well above their weight in some categories, and fell behind in others. High numbers of reviewers in app store shows potential for riders to become advocates (all apps have 4.5-5 stars)

Followers	Lime	Bird	Skip	Spin
Facebook	49K	42K	562	2K
Twitter	24K	16K	2K	4K
Instagram	72K	87K	1K	24K
Apple App Store Reviews	1.2M	663K	66K	135K

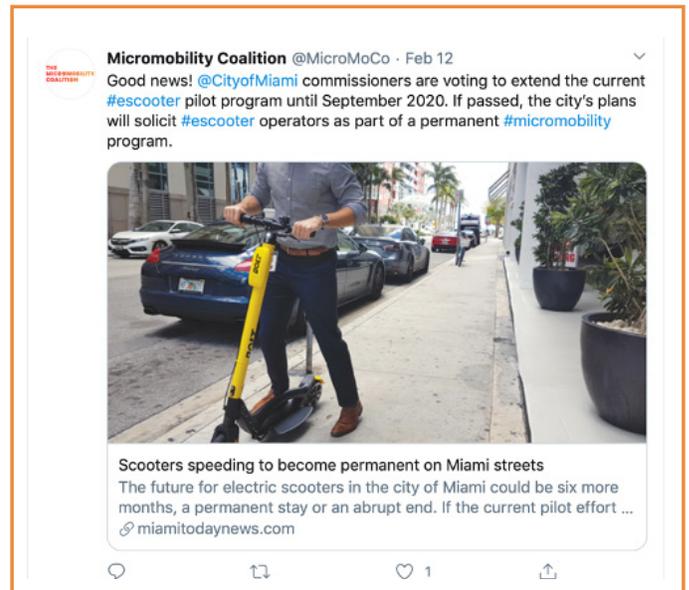
Raw Post Counts: Dec 2018-July 2019

Lime	Product Marketing	Community Events/Issues	Public Affairs/Call to Action	Company News
Facebook	109	40	24	26
Instagram	104	0	0	1
Twitter	361	174	175	119
YouTube	9	0	0	1
Blog	6	1	2	7
Bird	Product Marketing	Community Events/Issues	Public Affairs/Call to Action	Company News
Facebook	0	0	0	0
Instagram	156	0	1	0
Twitter	112	18	22	4
YouTube	0	0	0	0
Blog	8	2	8	2
Skip	Product Marketing	Community Events/Issues	Public Affairs/Call to Action	Company News
Facebook	12	5	2	0
Instagram	11	2	0	0
Twitter	20	37	31	3
YouTube	0	0	0	0
Blog	0	0	0	0
Skip	Product Marketing	Community Events/Issues	Public Affairs/Call to Action	Company News
Facebook	53	5	7	0
Instagram	173	0	0	0
Twitter	86	10	23	3
YouTube	0	0	0	0
Blog	1	2	3	0

What public affairs content we did find usually commented on decisions that had already been made – not those that could be affected:



When there was content that focused on pending decisions, there was no clear call to rider action and no clear target for such actions:



There might be solid business reasons for the marketing emphasis, even in the face of the sector's explosive growth before the pandemic. However, the lack of focus on public affairs is a drag on building relationships with local regulators—even more so because many markets are effectively duopolies, with the competing MM companies offering similar products. From the outside, it seems that gaining and maintaining permission to operate, not growing market share, should be the first priority for MM companies.

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Changes in the data over 2019:

- Lime increased its focus on community events and public affairs, while other companies focused more on product marketing. In Lime's digital stream, there were lots of posts documenting interactions with local policy makers and partnerships with local groups. Calls to rider action were still rare or vague.
- The focus of Bird's content stayed roughly the same, and its government affairs content had a more general focus, such as advocating for bike lanes. There were fewer examples of engaging with local officials than Lime, and no calls to rider action.
- Skip and Spin were similar to Bird, mainly focused on product marketing and no calls to rider action.
- Skip made heavier use of social media – especially Twitter – to engage on public affairs and community issues.
- Companies' blogs were relatively focused on public affairs and community issues.
- Some posts ask riders to join events that were usually just product marketing or safety-related events, such as handing out free helmets.
- The Micromobility Coalition developed a [content stream](#), and much of it discussed particular developments in specific communities that had already taken place. However, we found little discussion of pending actions and few calls to rider action to affect those policy outcomes.

Bolt expands:

- When we started this research (Feb-Mar 2019), Bolt had an online footprint that was an order of magnitude less than that of Skip and Spin, and two orders of magnitude smaller than Bird's and Lime's.
- Bolt officially started November 2018, a late entrant into the market. Though it expanded into more markets and is growing its social presence, it still trailed Skip and Spin.
- Bolt has only 902 Facebook followers and 971 Twitter followers. For context, Lime has 51,000 FB followers and 26,000 Twitter followers.
- The company's social presence is almost exclusively focused on product marketing. We found a few posts on MM's ability to ease congestion and pollution, a few on community events related to the company's presence in Miami (where Bolt is based) and several announcements when the company entered a market. Overall, though, the company's digital output was very light on substantive community affairs, with no calls for riders to take action.

Lime increased its focus on community events and public affairs, while other companies focused more on product marketing.

Needed: More Third-Party Validation

During our initial interviews with public affairs management and staff, there was a consensus that emerged: MM companies' public affairs operations needed more of a campaign-like approach, a key part of which is coalition building to create third-party validation.

We reviewed the set of new coalitions that have been started to help the sector. Together they make for a promising start, but they are nascent and do not call on riders to take actions on pending policy decisions.

Ideal vs. Existing Micromobility Coalitions

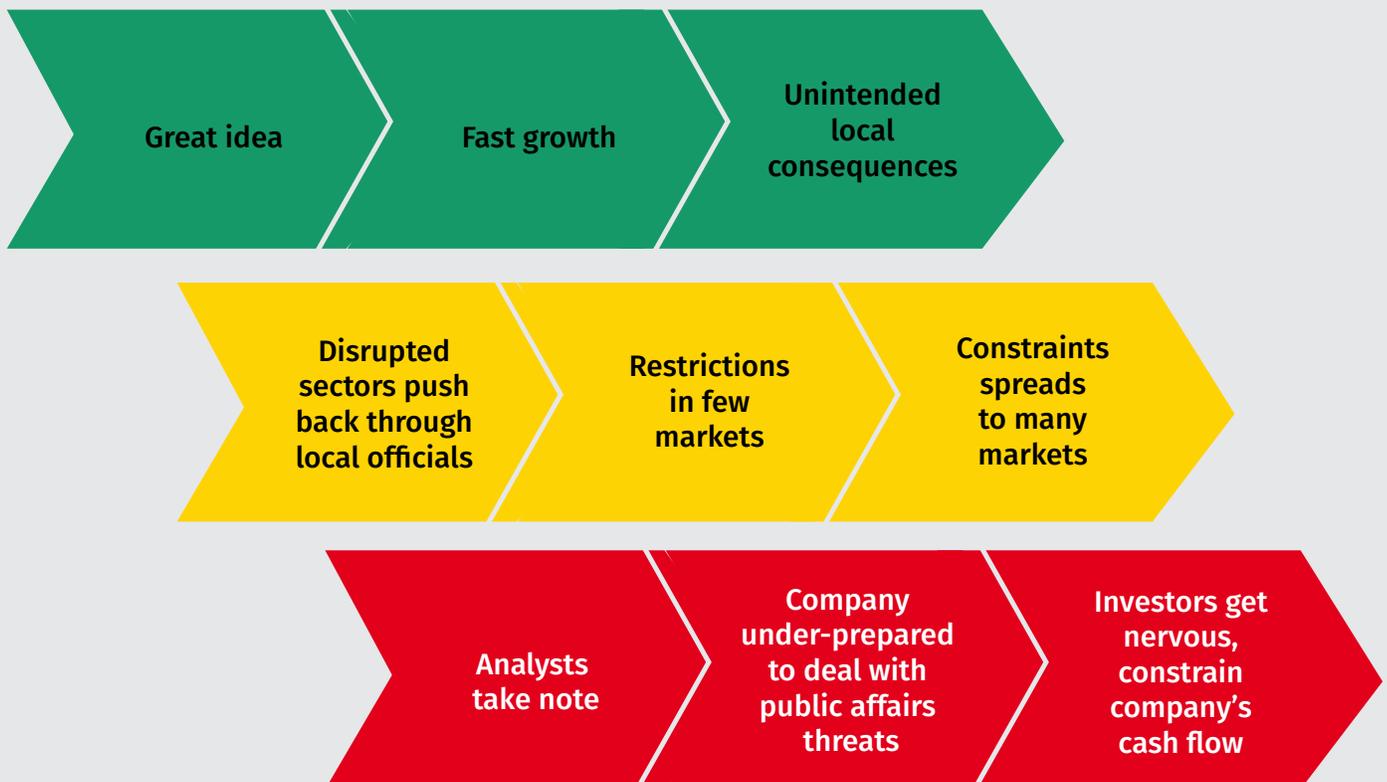
	Ideal Micromobility Coalition	New Urban Mobility Alliance (NUMO)	Shared Micromobility Principles	The Micromobility Coalition
Focused Primarily on Scooter/ Bike Policies	●			●
Advisory Board Includes Target Regulators	●			
Includes Range of Companies Across Relevant Industries	●			
Express Goal of Building Ethical Partnership Between Cities and Companies	●			●
Analytical and Content Arm, Positioned Like a Think Tank	●			
Clear Tactical Focus and Narrative on Funding	●			
Stated Priority of Helping Cities and Riders	●	●	●	●

Other Sectors Have Lessons MM Can Leverage – The Clean Economy Mistake Path

In the decade we've spent supporting other disruptive clean economy sectors, we've experienced firsthand the challenges faced by onshore (land-based) wind, solar, PACE, home sharing and cannabis companies. Most of these sectors grew at the expense of powerful incumbents who could engineer pushback. Some, such as cannabis, did not.

However, all of them took a series of steps that roughly overlap, forming a pattern that we've called the "Clean Economy Mistake Path." The Mistake Path captures the three stages of problems created by not building public affairs into business plans — at scale, and right from the start. We contend this pattern has become the "new normal" for clean economy sectors with local regulatory exposure.

Mistake Path Of Other Clean Economy Sectors



It's important to note that the Mistake Path is an *entirely optional future* if its lessons are harvested and applied.

Green Zone

In the Green Zone, the imperatives of market opportunity and capital burn spur early-stage commercial companies to grow in as many places as possible to capture market share. Companies in this stage begin to accumulate mistakes that are inevitable with any groundbreaking effort. Companies are moving too fast to evaluate if yesterday's mistake will become next year's problem.

Yellow Zone

In the Yellow Zone, the newcomers' mistakes in a few markets spread to many. Disruptors displacing bigger, incumbent players have their problem actively spread by the larger budgets and bandwidth of incumbents that are practiced at reacting to disruptive threats.

But for MM, the pushback isn't fueled by a powerful incumbent. Rather, it's created by the safety problems of careless, helmetless ridership meeting distracted driving on streets with inadequate infrastructure for MM consumers.

Red Zone

Most companies with a single-city problem become a multi-market problem find themselves entering the Red Zone, which is comprised of these downward steps:

- Analysts begin to note the “controversy” generated by negative media coverage and online attention.
- One investor begins to overreact, spreading fear among the company's other investors.
- The company is forced to over-compensate for its under-investment in public affairs. Critical resources are re-directed from business plan execution to spending money, time and focus on firms like mine to bail the company out of the problem.

In the Red Zone's best-case scenario, the executive team successfully solves its public affairs crisis at a significant cost. In the worst case, the hospital bed becomes a room in hospice, and the company goes out of business.

The Mistake Path captures the three stages of problems created by not building public affairs into business plans — at scale, and right from the start.

How MM Is Different, And Those Differences Create Its Opportunity Era

The Mistake Path's lessons are available, and ignoring them can be costly.

MM is different than other sectors in some very important ways. These differences have to be accounted for as MM companies adapt the lessons of the Clean Economy Mistake Path.

- 1 There is no incumbent industry pushing back against scooter and bike sharing.
- 2 There are more purchases than in other clean economy sectors generating far more customer data.
- 3 Riders can be mobilized far more cheaply through smart phones.
- 4 However, renting a scooter for 15 minutes is a much less committal act than taking out a PACE loan or putting solar panels on your roof. There's less customer commitment to leverage for taking public affairs actions.
- 5 This creates the opportunity to design "micro-activism" steps that tier involvement by how frequently a rider uses scooters and bikes.

In short, MM:

- **Has access to more data on more people than other sectors.**
- **Can connect with people far more cheaply.**
- **Can downsize public affairs calls to action so they can be taken easily — but still add up to meaningful pressure on public officials.**

As of this writing, this remains unrealized potential. Four of us at our firm rode several companies' scooters last year in San Francisco, DC, Boston and Denver. None asked us to take action to support continued ridership. In fact, for those of us who remain frequent MM riders, none of us has ever been asked to a MM public affairs action. Although, it should be noted that Bird's and Lime's programs are advancing quickly enough that our assertion might be outdated when you read this.

However, it's unclear that any MM company is currently segmenting rider data to custom-communicate with key rider cohorts. In our view, this is where MM's opportunity era begins:

- Use rider data to segment riders by their willingness to promote MM to public officials.
- Design a ladder of engagement, from the fastest and easiest steps for a rider to take to those that are the most time-consuming.
- Use company platforms to custom-engage different rider segments. Action options should include brief steps that can accumulate into real traction with public officials – what we referred to earlier as a "micro-activism" program.
- Track and count rider communications.
- Direct those rider actions not just at public officials, but also at local organizations to recruit them as allies in support of MM-friendly policies.
- Frame all rider communications so they set the bar on partnership with elected officials by first assuring officials of public support (political safety), then highlights political benefits.

Best Practices Checklist

- ✓ Campaign mentality
- ✓ Compelling messaging and value proposition
- ✓ Deliver political safety, then political benefits to officials
- ✓ Use of customer data in government relations
- ✓ Share data with universities and think tanks who can serve as validators
- ✓ 3-party validation – though built or existing organizations



Conclusion

We recognize that the pandemic has hit the MM industry hard, and no one can say how quickly ridership will climb to pre-pandemic levels. But the urgency of global climate disruption has only grown in the last several months – and with it, the criticality of scaling micromobility options for city and suburban residents.

The pandemic has created the opportunity for clean economy sectors to work with policy makers to shift to a sustainable economy. If each sector learns from and adapts to hard-won collective lessons, we can accelerate change. This book is dedicated to MM executive teams and public affairs leaders who now grip the handlebar.



The pandemic has created the opportunity for clean economy sectors to work with policy makers to accelerate the shift to a more sustainable economy.



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