

The Bike and Scootersharing Telematics Market



The Bike and Scootersharing Telematics Market is the second strategy report from Berg Insight analysing the latest developments on the connected micromobility markets worldwide.

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Highlights from this report:

- **Insights** from 30 executive interviews with market leading companies.
- **New data** on bikesharing and scootersharing fleets worldwide.
- **Comprehensive overview** of the connected bikesharing and scootersharing value chain.
- **In-depth analysis** of market trends and key developments.
- **Detailed profiles** of 26 technology vendors and their propositions.
- **Case studies** of 47 shared micromobility initiatives.
- **Market forecasts** by region lasting until 2024.



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The shared micromobility fleet to reach 40.4 million vehicles in 2024

Passenger cars and light trucks are the main modes of transportation in most industrialised countries. The vast majority of car trips in metropolitan areas are drive-alone trips with only one person in the car and vehicles are used for only about one hour per day on average. Bikes and scooters are shared micromobility services that have become available for people that want to complement other modes of transportation. Examples of other mobility services include traditional carsharing, carpooling, ridesharing, taxi and ridesourcing services. Many of these mobility services aim to decrease the cost of transportation, create convenience through fewer ownership responsibilities, as well as reduce congestion and environmental impact.

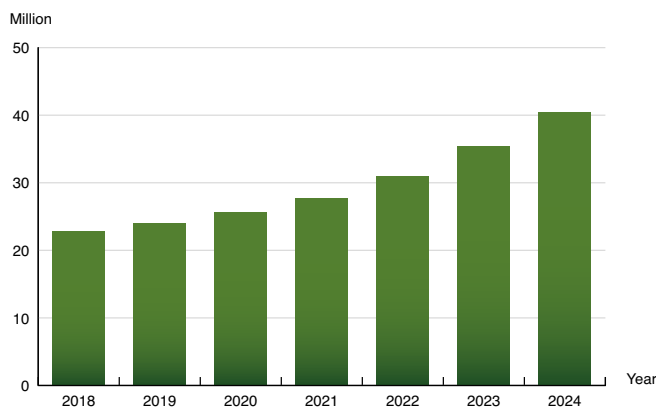
Micromobility includes shared mobility services in urban areas that offer short-term rentals of light vehicles such as bikes, scooters or other similar vehicles to paying members or communities. The services aim to reduce urban congestion as well as car usage and car ownership to improve the inner-city landscape and reduce air pollution. Usage is typically billed by the minute/hour with rates that include parking, fuel or charging and maintenance. The services are generally used for short trips between 0–10 kilometres. Bikes and scooters are a kind of decentralised bicycle rental service, usually focusing on short term rentals that supplements other modes of transport including walking and public transport. Scooters are a membership-based service that offers motorised scooters to qualified drivers in a community. Users do not need to sign a written agreement each time a scooter is reserved and used. The vehicles are usually traditional electric scooters or new types of stand-up electric scooters. Today, most operators use two operational models – free floating and station-based. The station-based operational model enables members to pick up and return the vehicle at any designated station in a city. The free floating operational model is rapidly gaining users and rides. In 2014, a new wave of free floating bikes and scooters emerged from China, causing a change on the market. Free floating services mean that vehicles can be picked up and dropped off anywhere within a designated area.

New technologies in the form of telematics systems and smartphones are key enablers of bikes and scooters sharing micromobility services. Free floating services mostly encompass a telematics system that comprises an on-board computer and a telematics ►

► device for capturing trip data, enable fleet management and grant access to the vehicle through a smartphone app. Software platforms include complete systems that can support all the operational activities of a micromobility operation ranging from management of in-vehicle equipment, fleet management, booking management, billing, as well as operations supervision via dashboards and data analytics. Leading vendors of micromobility technology such as connected bike locks, infrastructure for station-based bikes and scooters and software platforms include Conneqttech, Nextbike, Smoove, PBSC and SharingOS. Leading micromobility telematics solution players include COMODULE, INVERS and Vulog.

Berg Insight estimates that the total shared micromobility fleet worldwide reached approximately 23.9 million vehicles at the end of 2019. Free floating bikes and scooters was the most dominant service in terms of deployed vehicles. Berg Insight forecasts that the bikes and scooters fleet will reach 35.8 million globally by the end of 2024 and the scooters fleet comprising both traditional and stand-up scooters will then reach approximately 4.6 million vehicles. The regulatory environment will have a considerable impact on the future for this market. Regulators decide the types of vehicles allowed on the road, helmet requirements as well as award operator licenses that limit the number of operators and vehicles allowed.

Commercial micromobility services are offered by specialist bikes and scooters sharing companies, local governments, public transport operators as well as other shared mobility operators. Examples of leading free floating bikes and scooters operators include Meituan Bike, HelloBike and JUMP. Station-based bikes and scooters operators include Motivate, Nextbike and JCDecaux. Leading traditional scooters sharing operators include E-Cooltra, Muving, CityScoot and Blinkcity. During 2017–2018, new services comprising stand-up scooters were introduced. The market has grown significantly during the past years and the leading operators in this segment include Lime, Bird, Spin, Voi and Tier. There has been significant M&A activity on this market in recent years, involving diverse players from many parts of the ecosystem. Notable deals in 2019–2020 include Bird's acquisition of Scoot and Circ, Ojo's acquisition of Gotcha and Tier's acquisition of the assets of the traditional scooters sharing operator Coup.



The connected bikes and scooters sharing fleet (World 2018–2024)

This report answers the following questions:

- What is the current status of the shared micromobility industry?
- Which are the leading technology platform providers?
- How are carmakers and other mobility companies positioning themselves on the market?
- What bikes and scooters services are available from leading service providers today?
- What scooters sharing services are available from leading service providers today?
- What business models are used by bikes and scooters sharing operators?
- How will the regulatory developments affect this market in the next years?
- How will the market evolve in Europe, North America and other parts of the world?



Executive Summary

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Glossary

About the Author



Martin Svegander is a Senior Analyst with a Master's degree in Industrial Engineering and Management from Linköping University. He joined Berg Insight in 2017 and his areas of expertise include vehicle telematics, insurance telematics and shared mobility services.

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