

# EUROPEAN RENAISSANCE

*Shared Mobility in  
Q2 2021*

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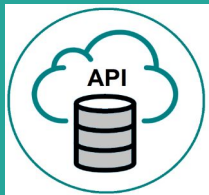
Cameron Rimington  
Project Lead - fluctuo



**fluctuo** is a leading provider of urban mobility services data



*We combine innovative data collection methods, sophisticated algorithms and a team of mobility experts to deliver the best data possible to our customers.*



#### **Data Flow: Real-time vehicles location API**

- Exhaustive and accurate data on shared vehicles
- Available in real-time
- 180+ operators listed in 500+ cities.



#### **City Dive: Business Analytics Tool**

- City-centric dashboard offering data insights
- Daily KPIs on fleets / trips / usage
- 85+ European cities surveyed



# EUROPEAN SHARED MOBILITY INDEX

— JULY 2021 —

**275**  
SHARED  
SERVICES  
**16**  
CITIES



# What's covered

station-based systems  
(incl. virtual stations)

free-floating shared bikes

free-floating “kick” scooters

moped sharing

car-share  
(stations, free-floating & peer2peer)

# What's not

ride-hailing services

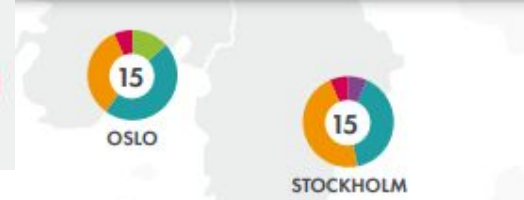
long-term rentals

corporate fleets

private sharing pools

traditional rental agencies  
(e.g. for tourism)

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## *Quarterly snapshot of Europe's shared mobility sector*

Q2 2021:

- 16 different cities
- 4 shared transport modes (bikes, scooters, mopeds & cars)
- 275 services
- 270,000 shared vehicles
- 37 million trips



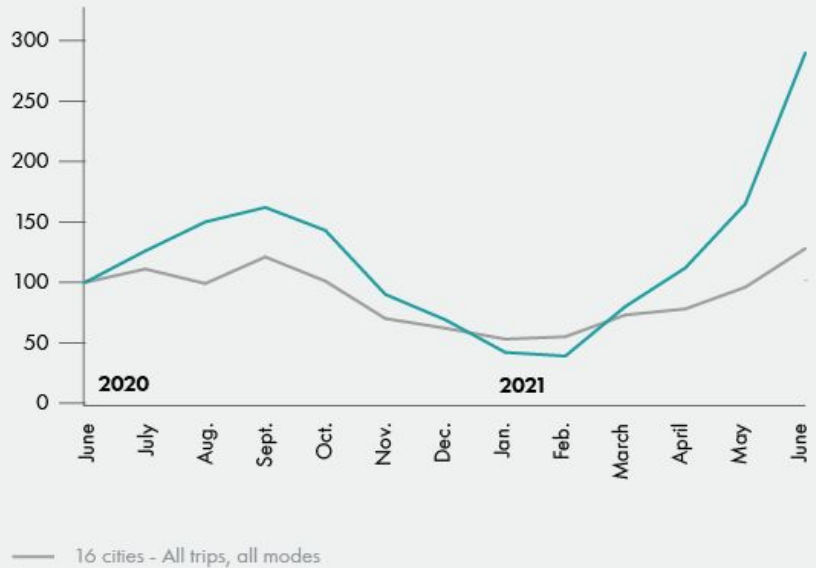
+ 76% since March 2021

+ 31% since June 2020

Scooters alone:  
*Almost tripled in 3 months*

## EVOLUTION OF RIDERSHIP

Base 100 / June 2020





## EVOLUTION OF RIDERSHIP

All trips, all modes - Base 100: June 2020





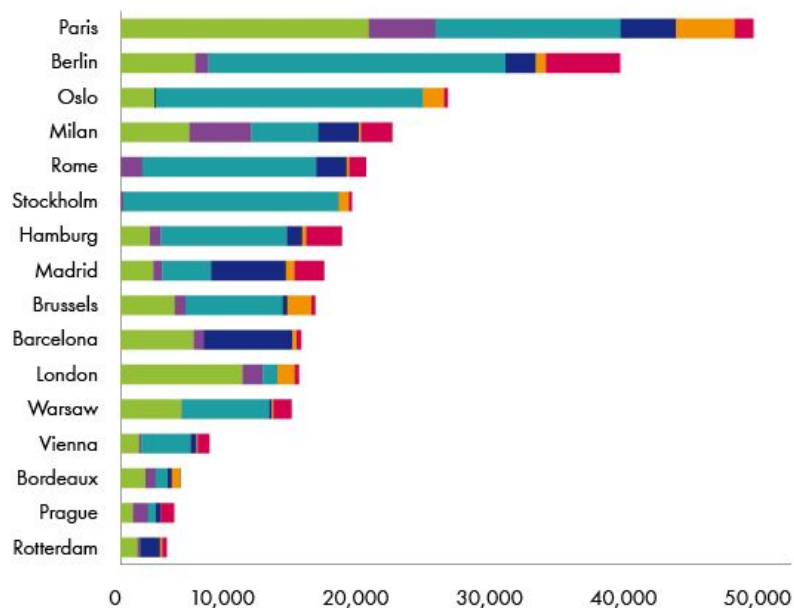


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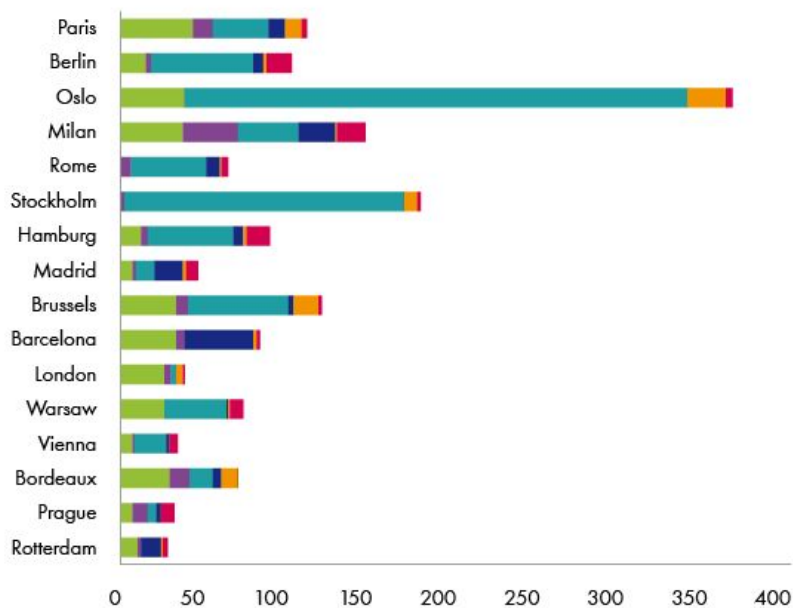
## TOTAL SHARED VEHICLES

As at June 2021



## SHARED VEHICLES PER 10,000 INH.

As at June 2021





# Summer is Coming...

Rome: +70%

Milan: +44%

Barcelona: +16%

## BIGGEST MOVERS Q2

Ridership - June 2021 vs March 2021

+350%



OSLO

+248%



WARSAW

+184%



STOCKHOLM

84,000 shared bikes

as of June 2021

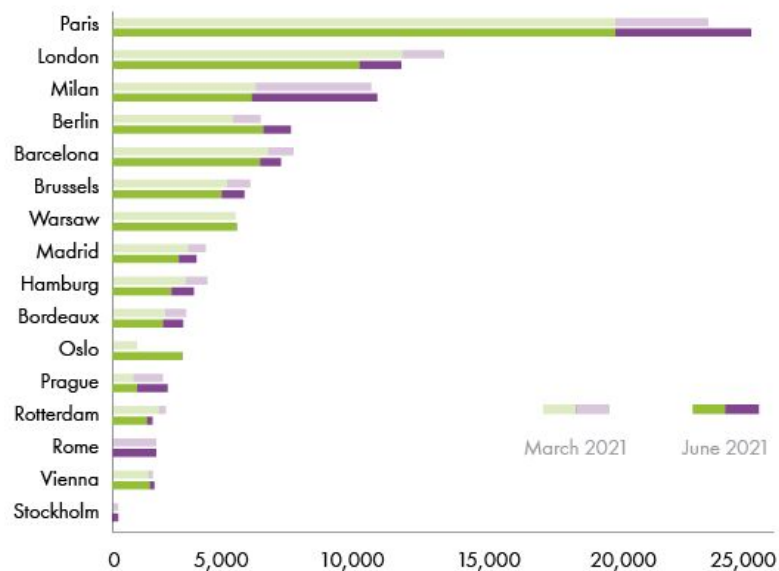


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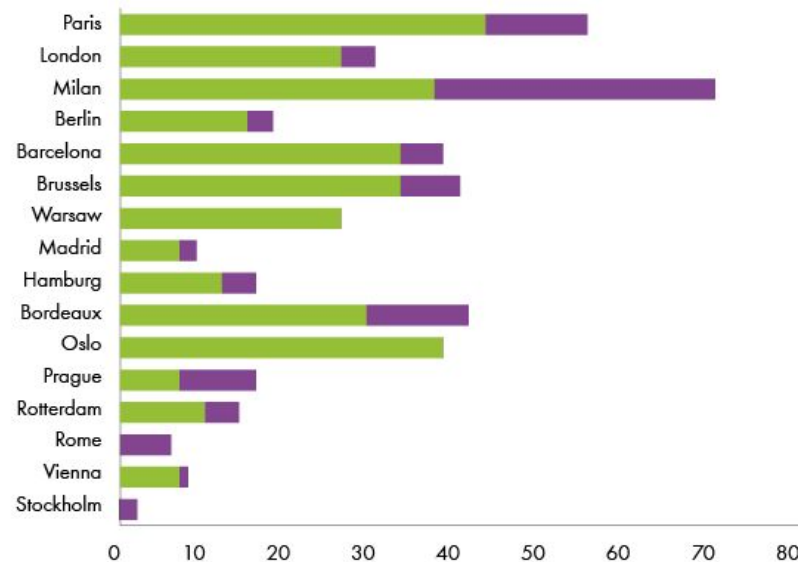
## GROWTH IN TOTAL BIKES

March 2021 vs June 2021



## SHARED BIKES PER 10,000 INH.<sup>(1)</sup>

Approx. June 2021

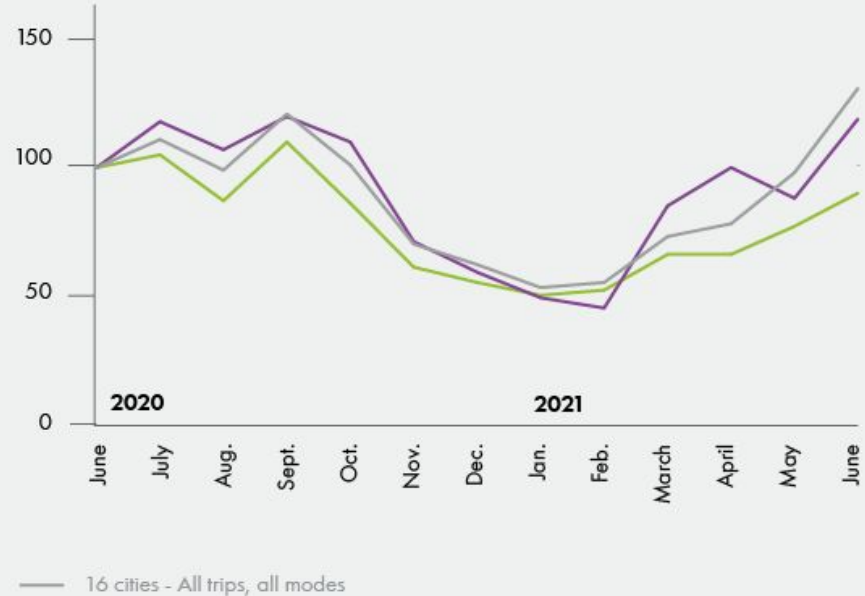


9.4 million trips  
+ 40% since Q1  
3 bikes/second



## EVOLUTION OF RIDERSHIP

Base 100 / June 2020

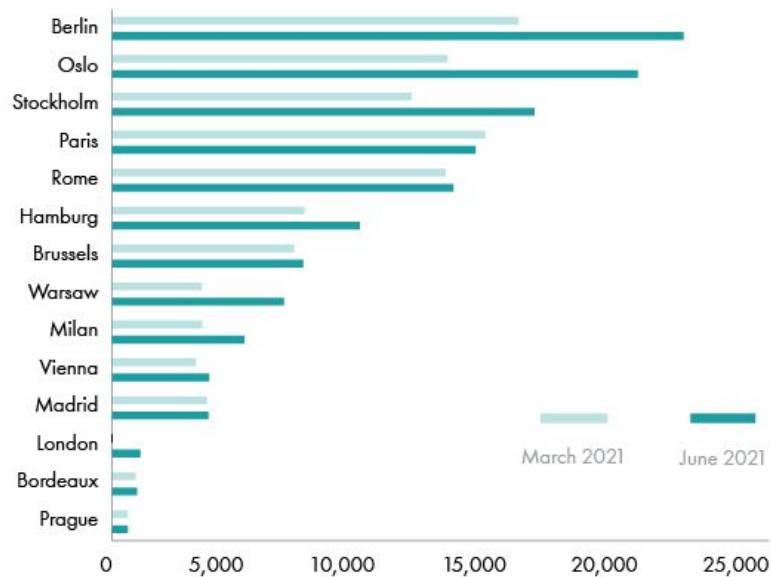


123,000 shared scooters

as of June 2021

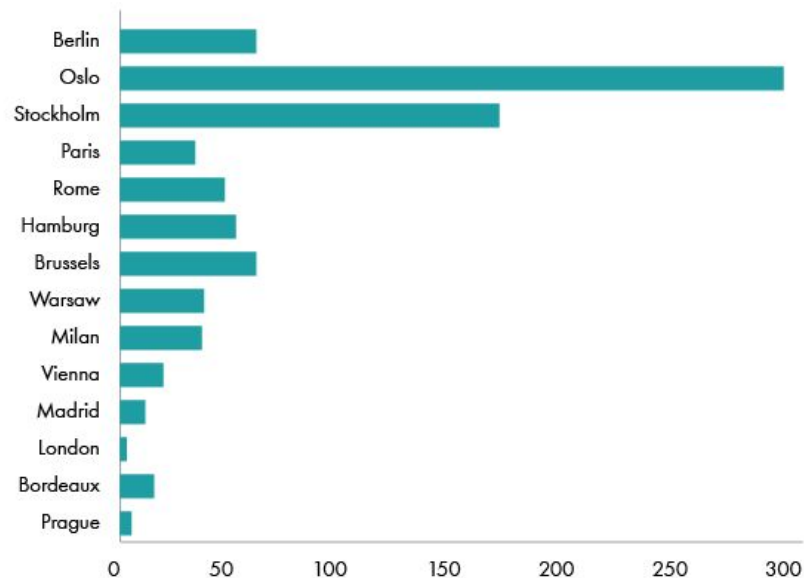
## GROWTH IN TOTAL SCOOTERS

March 2021 vs June 2021



## SHARED SCOOTERS PER 10,000 INH.<sup>(1)</sup>

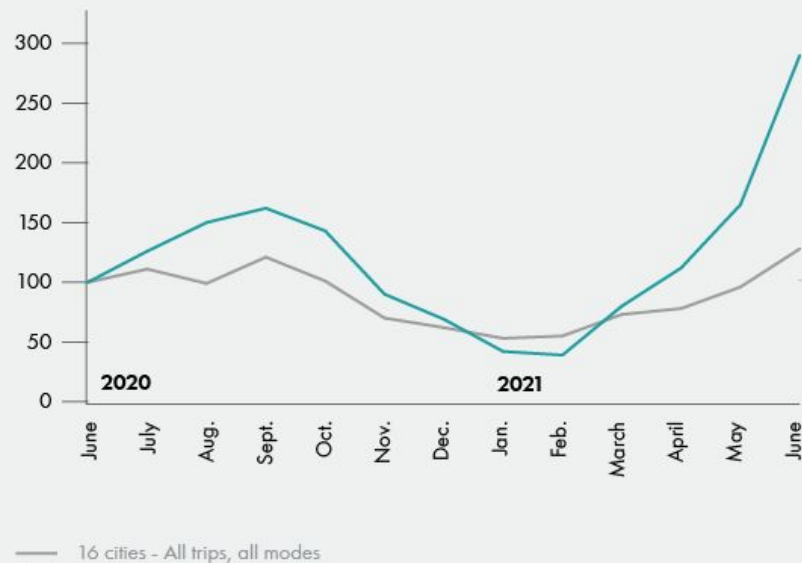
Approx. June 2021



9.4 million trips  
+ 6.3M since Q1  
~ 4 scooters/second

## EVOLUTION OF RIDERSHIP

Base 100 / June 2020







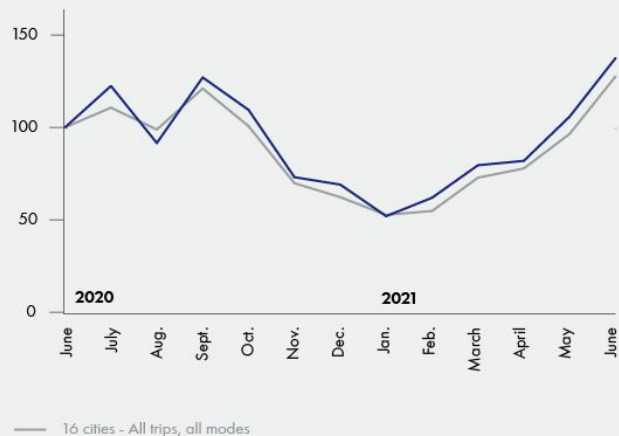
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## EVOLUTION OF RIDERSHIP

Base 100 / June 2020



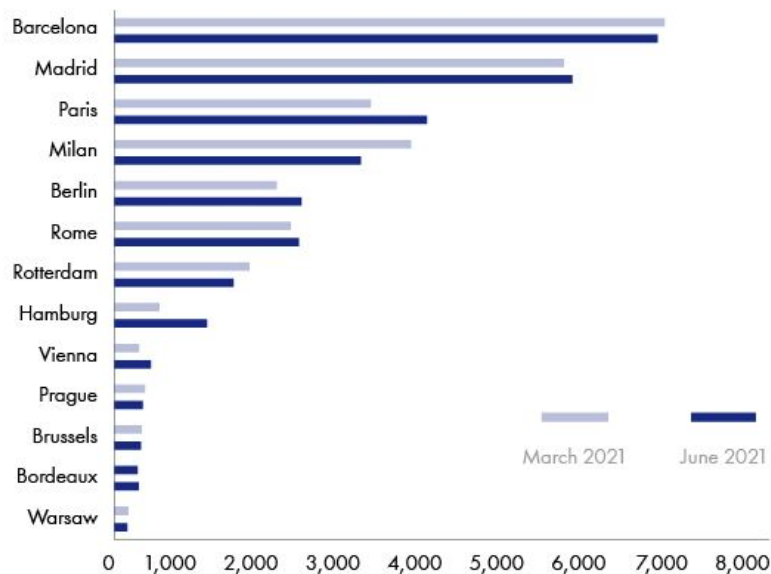


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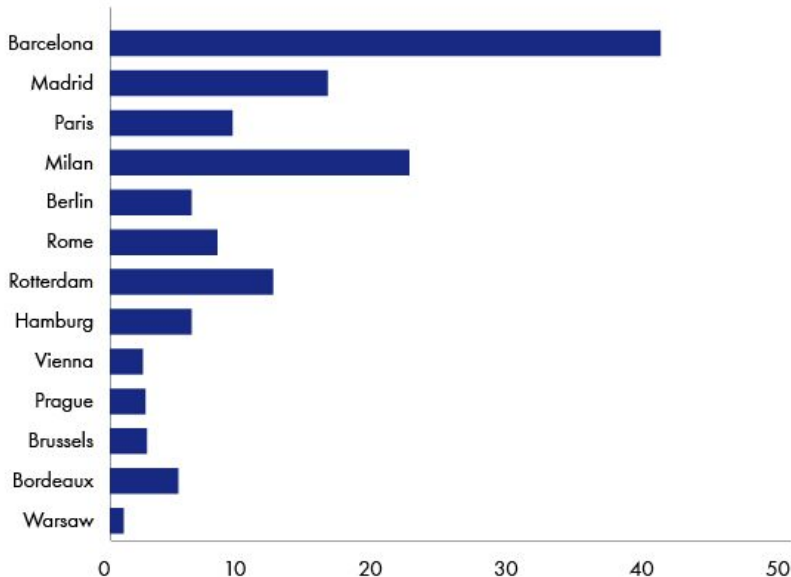
## GROWTH IN TOTAL MOPEDS

March 2021 vs June 2021



## SHARED MOPEDS PER 10,000 INH.<sup>(1)</sup>

Approx. June 2021





# CAR SHARING

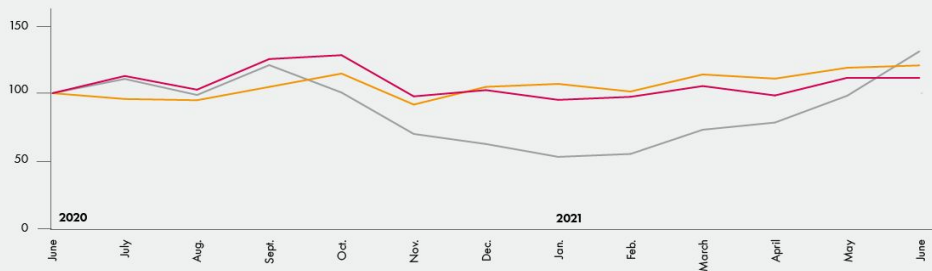


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## EVOLUTION OF RIDERSHIP

Base 100 / June 2020



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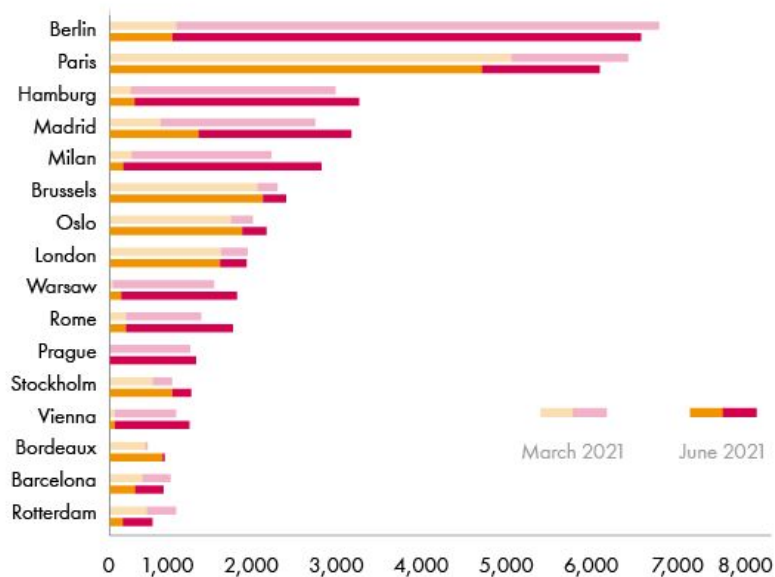


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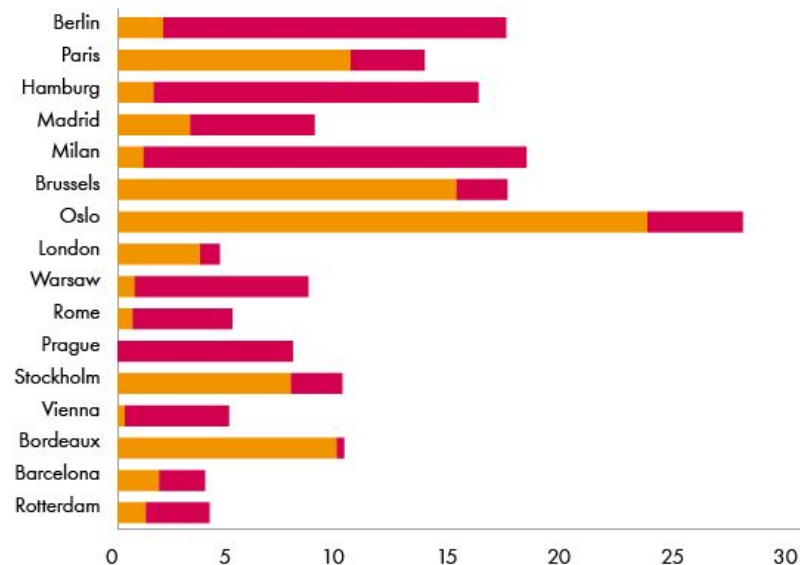
## GROWTH IN TOTAL CARS

March 2021 vs June 2021



## SHARED CARS PER 10,000 INH.<sup>(1)</sup>

Approx. June 2021



# *Trends to watch in 2021*

- expansions & consolidation - can Europe sustain this many operators?
  - multi-modality
  - regionalisation - are the big cities “over”?
  - big policy reforms - London scooters; Paris mopeds; Rome???
  - digital visibility - MaaS integration; journey planning; mass transit
-



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