

Global Scooter Sharing Market Report 2019

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Cities are facing multiple crises – climate change, traffic congestion, and poor air quality, to name just a few. Improving urban mobility plays a key role in trying to relieve cities of these pressures.

One such solution is the arrival of scooter sharing. The primary focus of this report is to give a status update on the global scooter sharing market for 2019. By reviewing publicly available data and conducting market research, this report also focuses on four major trends in the industry.

This analysis was performed by the Berlin-based company unu, a mobility company working on revolutionizing urban mobility for the better. The report's findings are of particular interest to shared mobility operators, scientists, urban planners, consultants, municipalities, the press and individuals alike. The authors have been focusing on scooter sharing and electric scooters in particular for several years now and want to facilitate a better access to the market by publishing this report.

All data of this report was analyzed as of August 16th 2019.

Setting the Stage

Scooters have been an important mode of transport in many parts of the world for decades, and until recently, were only available in the form of private ownership. Since its inception in 2012, the scooter sharing market has been growing year-on-year, with 2019 being no exception. The market has never been bigger.

This report solely focuses on electric and combustion scooters, as pictured on the right (moped; sit-down scooter, Vespa-like). Hence, kick scooters such as from operators Bird, Lime, TIER and others are not portrayed in the report.

We define scooter sharing as the shared use of above mentioned scooters, where operators enable customers to rent scooters directly through the use of a smartphone.



Both the demand and supply sides of the scooter sharing market more than doubled in 2019.

66,000 scooters

+ 41,000 scooters since 2018 (+ 164%)

21 countries

+ 5 countries since 2018 (+ 31%)

88 cities

+ 26 cities since 2018 (+ 42%)

54 operators

+ 16 new operators since 2018 (+ 42%)

4.8 million registered users

+ 3 million registered users since 2018 (+ 166%)

34 scooter manufacturers

8 new manufacturers entered the market since 2018 (+ 31%)

Scooters

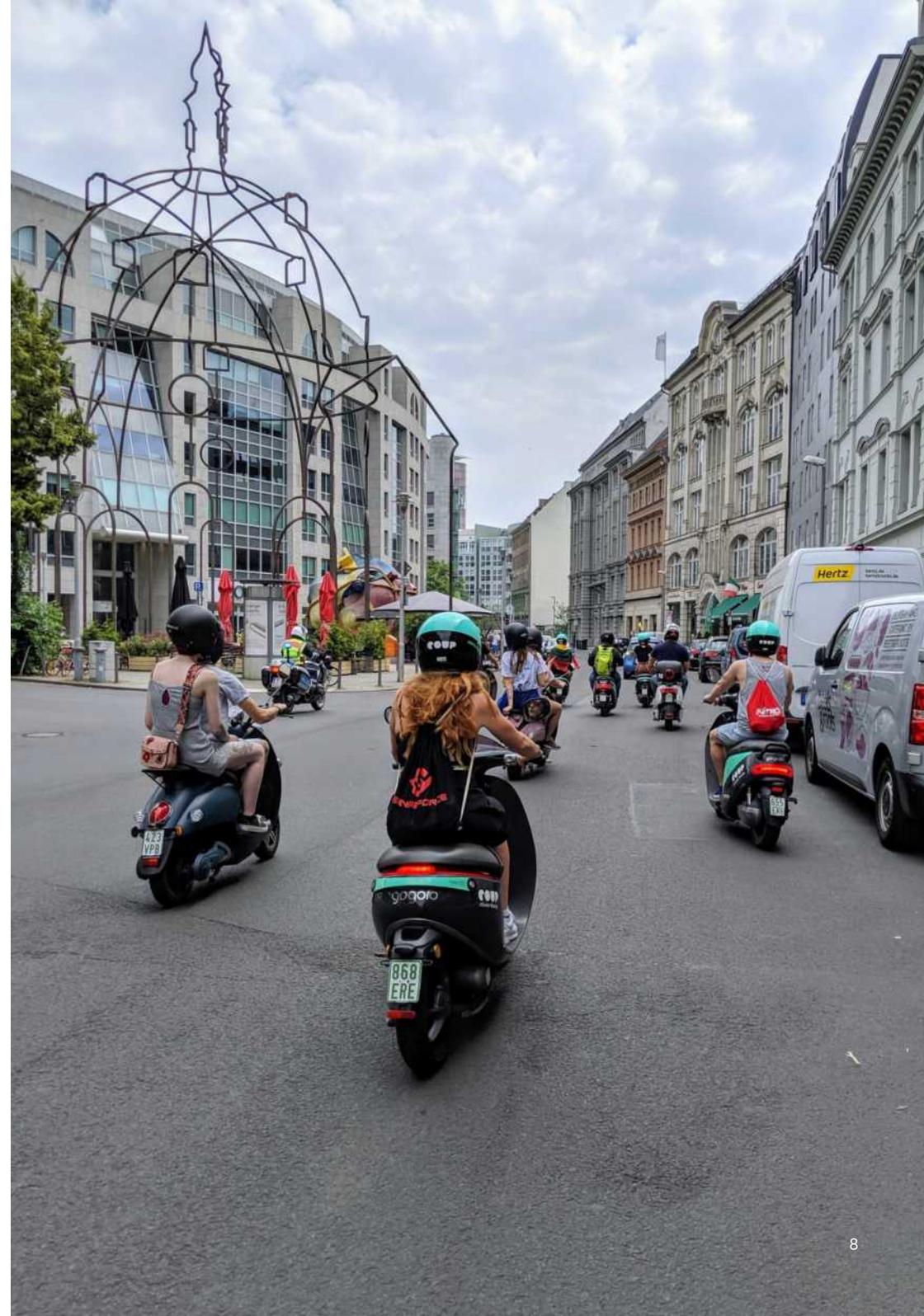
The number of scooters has increased by 164%. This year, the market exploded: The number of scooters now far exceeds last year's 25,000. Today, there are up to 66,000 scooters in shared mobility fleets available to customers.

It's noteworthy that almost half of this growth has taken place in India. Overall, the past 3 years have been very dynamic in terms of global scaling.

Over half of the fleets are owned by 5 operators. VOGO, eCooltra, Bounce, Cityscoot and COUP own 56% of the global scooter sharing fleet

The other 49 operators share 44% of the remaining global fleet. Each of the top 5 operators deployed more than 5,000 scooters. The total number of global scooter sharing operators grew by 42%.

The 5 biggest scooter companies are highlighted in the following pages.



Every other scooter is owned by one of the top 5 operators, who are spread across 6 different markets



Year founded:
2013

of scooters in sharing:
>7,000 (estimate)

Markets:
India

History:
Vogo is quite new in the scooter sharing business, having scaled most of its fleet in 2019. Gathered more than 100m USD from Ola with plans to expand its fleet to >100,000 scooters.

Investors/partners:
Ola



Year founded:
2015

of scooters in sharing:
7,400

Markets:
Spain, Italy, Portugal

History:
eCooltra is an early adopter of scooter sharing. High growth rates in terms of deployed scooters, available cities and customers alike.

Investors/partners:
Privately held, VC-backed



Year founded:
2014

of scooters in sharing:
7,000 (estimate)

Markets:
India

History:
Bounce entered the market more recently, having scaled most of its fleet in 2019. Gathered more than 90m USD from different investors. Aims for >50,000 scooters.

Investors/partners:
B Capital, Falcon, Edge Capital



Year founded:
2014

of scooters in sharing:
6,000

Markets:
France, Italy

History:
Cityscoot started by focusing first on the French market before entering Italy in 2019.

Investors/partners:
RATP Capital Innovation, Inventure Partners, Caisse des Dépôts and LeasePlan



Year founded:
2016

of scooters in sharing:
5,030

Markets:
Spain, Germany, France

History:
COUP started in Berlin and has since expanded to Paris, Madrid and Tübingen. COUP is a corporate startup from BOSCH.

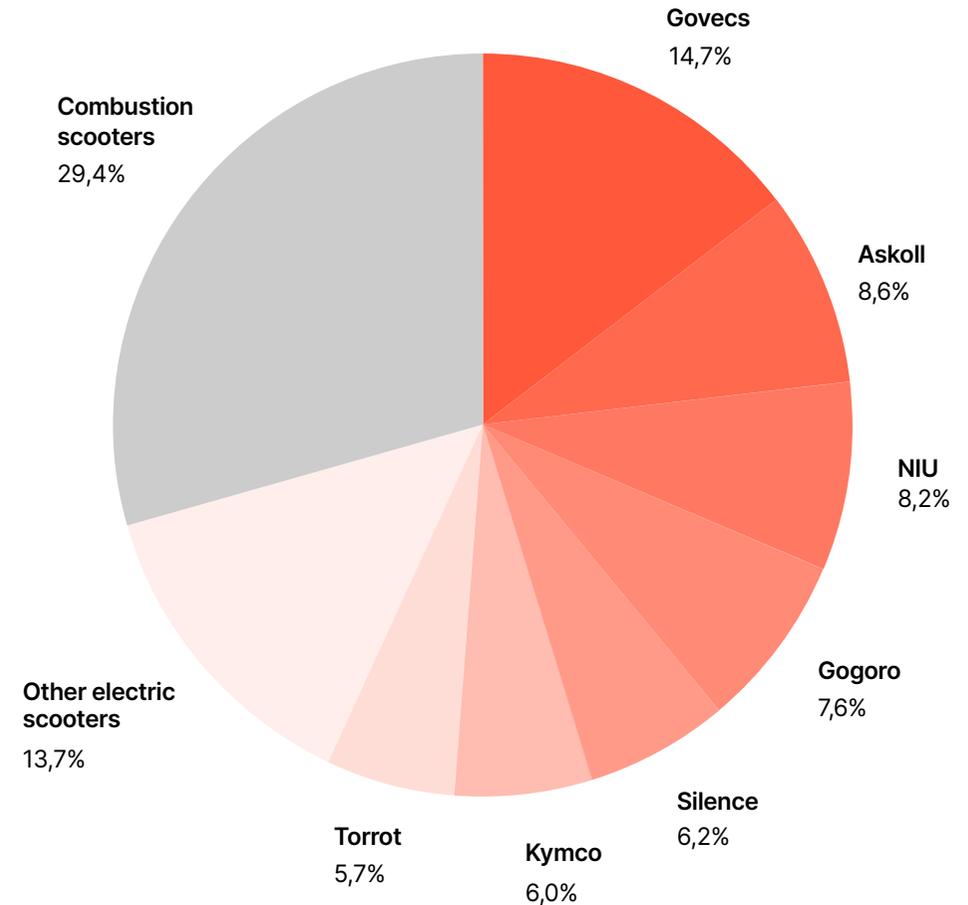
Investors/partners:
BOSCH, Gogoro

70% of scooters are electric

34 manufacturers currently provide scooters for the sharing market. Electric scooters dominate the market. However, this dominance has diminished, decreasing significantly from 97% to 70% due to the rise of the Indian market. Despite this sudden drop, the Indian market shows strong signs of electrification. Vogo and Bounce (highest estimates go up to 20,000 scooters) have announced plans to increase the number of electric scooters in their fleet in the future.

If we look at the rest of the world (all apart from India), the share of electric scooters increased from 97% to 99% - total domination.

As of today, the most important individual scooter brands for scooter sharing are Govecs, Askoll, NIU, Gogoro and Silence. Other manufacturers include Kymco, Torrot, Hero Electric, Genze, emco and at least 19 more companies. The total number of manufacturers in the industry grew by at least 31%.



*All electric scooter manufacturers with more than 5% market share are named in the chart. Sum can differ from 100% due to rounding.

3 variables to rule them all

Key Performance Indicators (KPIs) are relevant for operators, investors and suppliers alike. 3 important KPIs to successfully run a scooter sharing scheme are fleet utilization, usage duration and fleet availability.

The utilization rate has been increasing during the past years and at the moment sits somewhere between 8 and 10 rentals per day per scooter in a well-run business. Since most pricing schemes are based on minutes of usage, the average ride time per rental is equally important. The rental time is rather influenced by the service area, city structure and traffic conditions.

Finally, some operators complained about low fleet availability rates, which often range between 60% and 80%.

More analyses on 'How to run a scooter sharing scheme?' and important metrics can be found on our insights page on share.unumotors.com

Fleet utilisation

**8 rentals a day
per scooter**

→ average amount of rentals
per day per scooter

Usage duration

15-20 mins

→ average ride time per rental

Fleet availability

60-80%

→ scooters available on average

Distribution

Growth rates have been high throughout all country markets, with one new major market coming into play

* Additional scooter fleets with fleet sizes below 200 are deployed in Hungary, Romania, Croatia, Sweden, Lebanon and French Polynesia.

No. of scooters



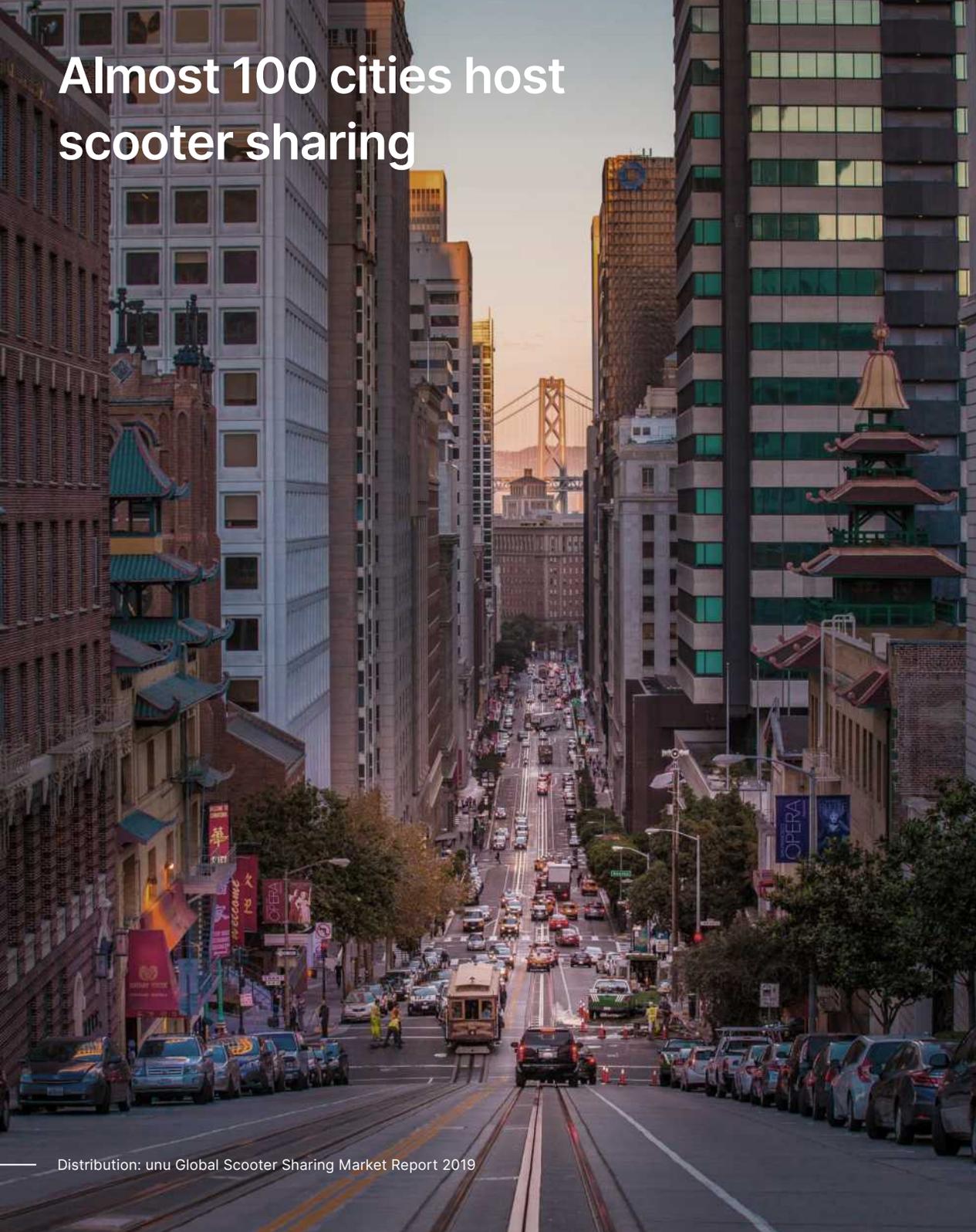
The majority of fleets are in Europe

All signs point to continued growth. In the past year, not a single of the 21 countries (+5 from 2018; + 31%) decreased its overall scooter sharing fleet. 15 out of 21 countries are located in Europe and account for 58% of the deployed fleet. India alone accounts for 30% of the fleet. Only 12% of the global shared scooters are not distributed in Europe or India – in Taiwan, USA, Mexico, Lebanon and French Polynesia. However, especially for Taiwan and the US, we expect a strong growth in 2019/2020.



The most important European markets are Spain, France and Italy.

Almost 100 cities host scooter sharing



Scooter sharing started in San Francisco in 2012 when Scoot Networks deployed just 10 scooters. Following a gradual international expansion to 8 more cities by 2015, scooter sharing really started to flourish between 2016 and 2018. Today, 88 cities have a scooter sharing scheme. From 2018 to 2019, the total amount of cities with fleets increased by 42%. Since 2016, the number of cities increased by more than 400% - an impressive development.

The sector is maturing.

More and more cities attract operators to launch new services. Of course, some cities are more attractive to operators than others – which naturally leads to competition.

Today, 20 cities are multi-operator cities.

In Madrid (6 operators), Valencia (5), Milan (5) and Barcelona (4), users have the biggest choice among operators. The global share of multi-operator cities slightly increased from 19% to 23%.

The Big 4: Bangalore, Madrid, Paris & Barcelona

Bangalore alone has an estimated number of shared scooters of up to 15,000 and therefore as many as the 76 smallest city fleets. Bangalore is, as of 2019, by far the global scooter sharing capital.

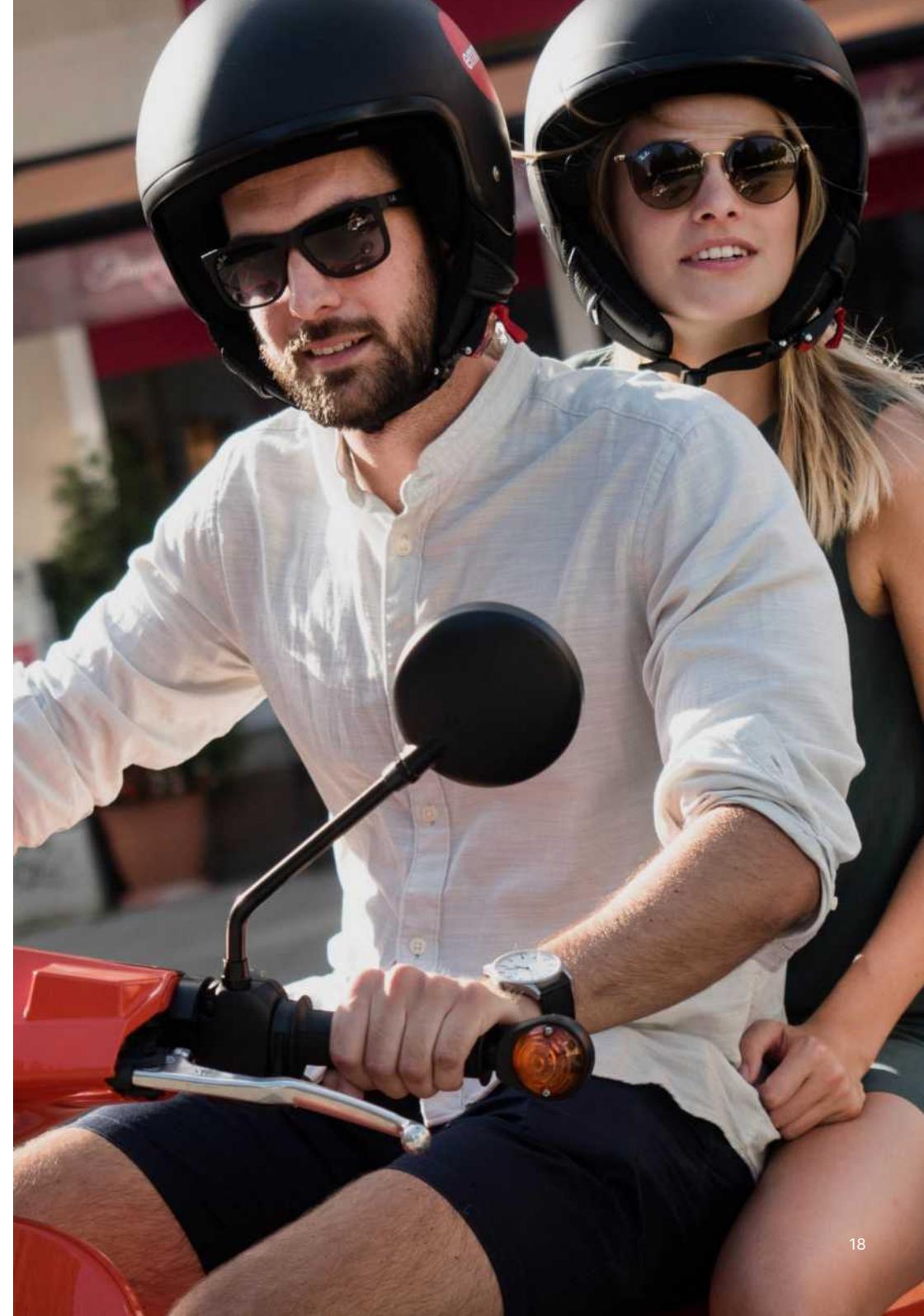
In Europe, Madrid (6,350) and Paris (6,300) are currently the scooter sharing cities with the largest fleets. Barcelona follows with 4,600 scooters.



82% of scooter sharing cities are located in Europe

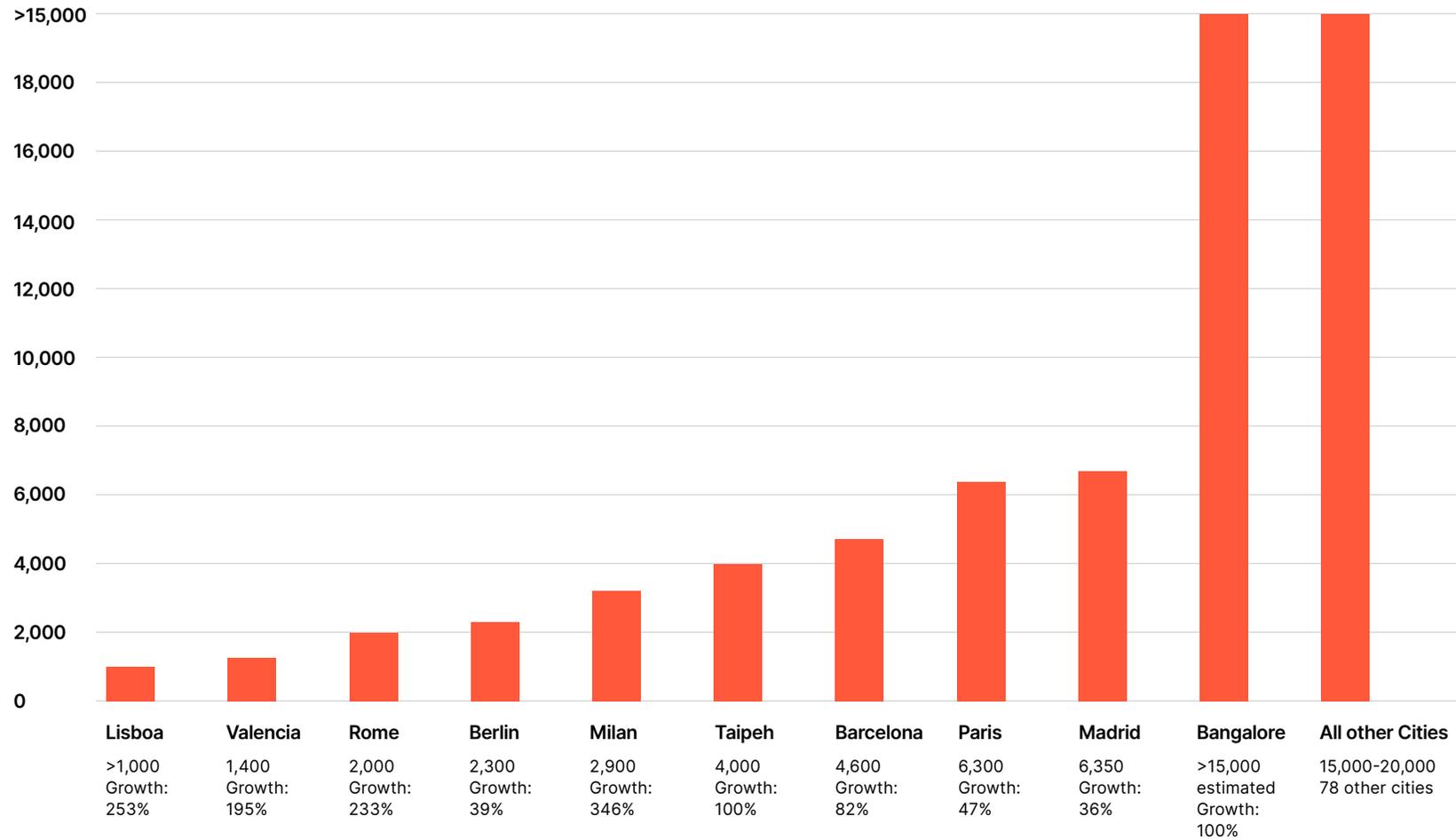
- Just 16 of 88 scooter sharing cities are not in Europe. Poland (20), Germany (17) and Spain (9) have the most scooter sharing cities.
- The 16 cities which are not located in Europe are in Asia (7), North America (7), Middle East (1) and Oceania (1).
- The widespread fleets in Poland and Germany can be explained by a high number of micro-fleets.

Note: The distribution of scooter sharing cities globally doesn't correlate with the number of deployed scooters. In terms of deployed scooters, India, Spain and France dominate the market (see page 13). Roughly, a little over 50% of scooters are located in Europe.



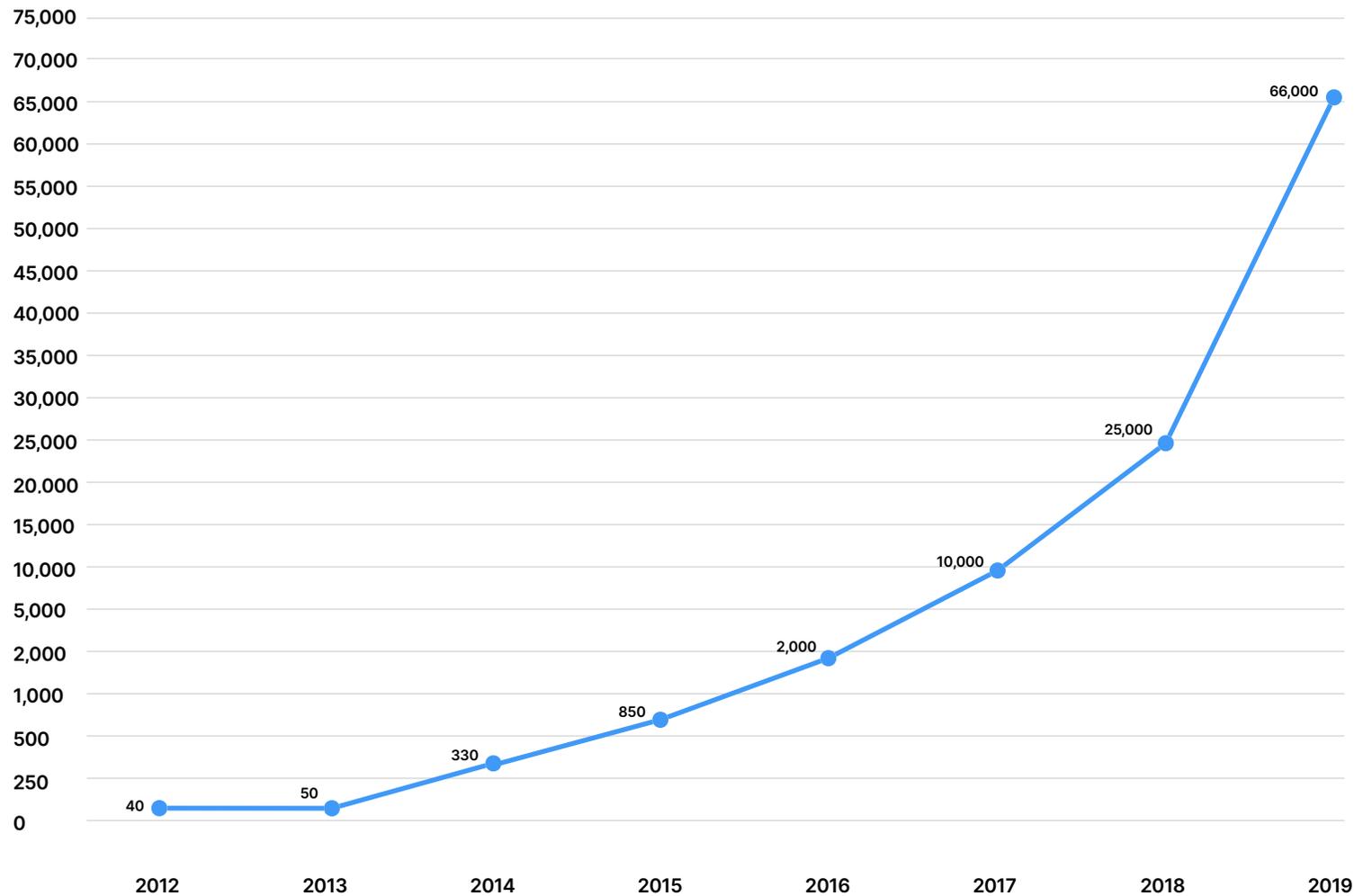
Bangalore outperforms all other city growth rates

No. of scooters



Global number of scooters: From humble beginnings to multi-thousand scooter fleets

Scooters



Legend

■ Scooters

More and more operators start in a record-high number of cities

Operators and Cities



Legend

- Operators
- Cities

Trends

Trend #1 India

Up to 30% of all scooters are in India alone. Almost all of them were deployed in 2019.

The most distinct development of the scooter sharing sector this year has been the rise of the Indian market. Two companies, Vogo and Bounce, have closed large investment rounds with strong partners and dominate the local market: Vogo gathered +100 million USD and is backed by Ola, whereas Bounce gathered another +100 million USD. Together, they brought an estimated number of almost 15,000-20,000 scooters to the streets of India. This number feels even bigger if we keep in mind that one year ago the entire global market consisted of just 25,000 scooters.

The presence of further scooter sharing companies (e.g. Fae Bikes or dabadigo) underline the strong market development.

Trend #2

Multi-Modal Fleets

Operators are increasingly adding additional vehicle types to their fleet.

This includes scooter sharing operators, which add, for example, kick scooters or bikes, as well as other shared mobility operators, deciding to introduce scooters to their fleets.

The list of multimodal fleet operators is long and growing and includes e.g. Scoot (acquired by kick scooter company Bird earlier this year), Blinkee, Mobility, Poppy, Indigo Weel or Movo.

This trend is expected to continue in 2020.

Trend #3

Price Increases

Scooter sharing has traditionally been priced in-between bike and car sharing.

In late 2018 and over the course of 2019, many services have increased their prices. Today, scooter sharing operators price their rides in the mid-range of 20 to 30 cent (EUR) per minute.

Price increases mainly occurred to make business models more sustainable. A common challenge for shared mobility operators of all vehicle types.

Trend #4

Growth beyond Europe

Even though San Francisco has been the cradle of the scooter sharing business model in 2012, it was grown in Europe.

We see clear indicators for a strong market growth beyond Europe in 2020. Following the Indian example, we expect several countries of the Global South to launch scooter sharing schemes in the next two years. Additionally, we see major market development activities in the US, Asian and Australian market.

Users

Almost 5 Million Users

In comparison to 2018, the number of registered users grew by 166% (2018: 1.8 million, 2017: 0.35 million). User numbers (either registered or active) are hard to obtain. Some operators publish numbers, others don't.

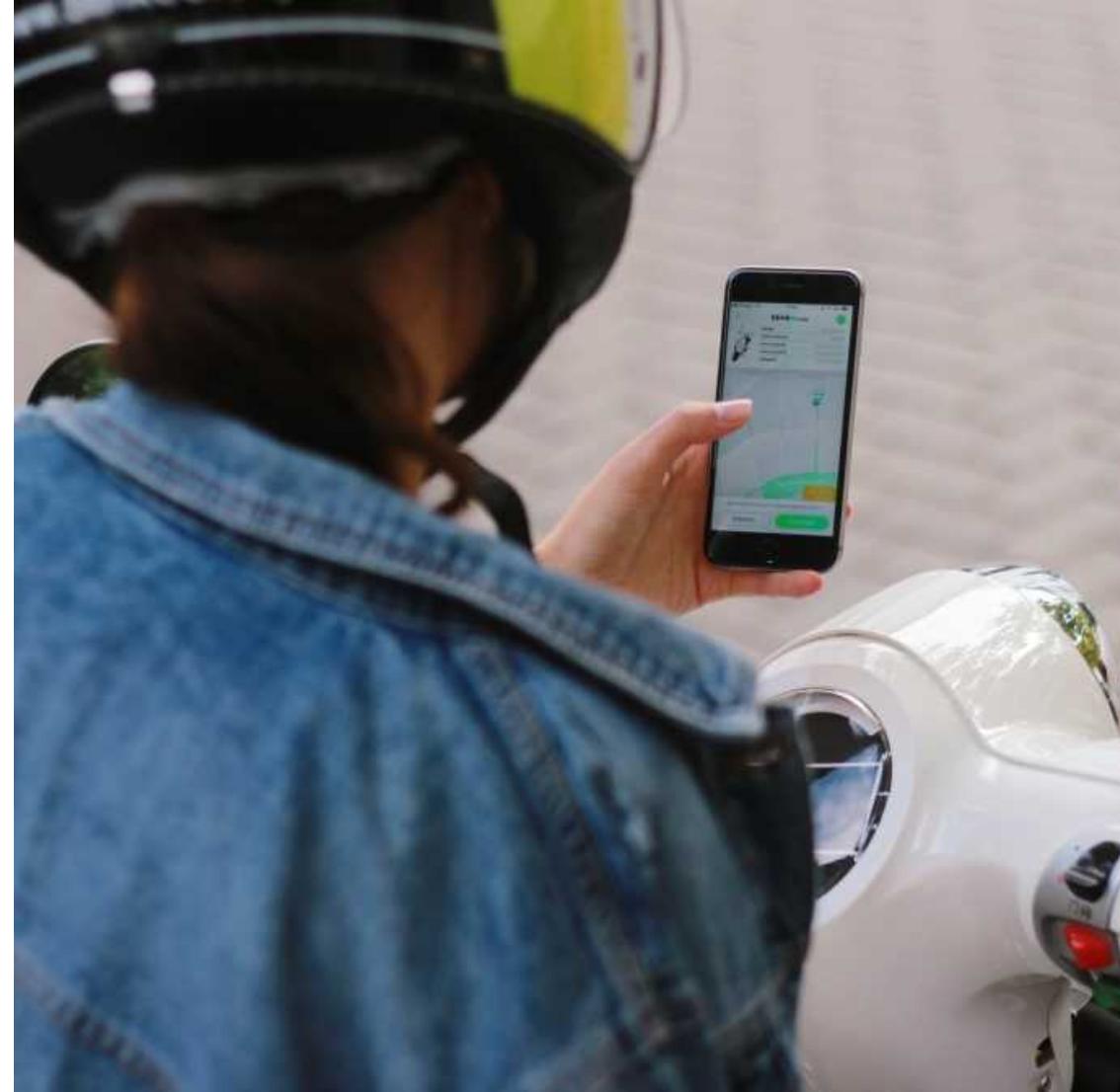
unu estimates that there are 4.8 million registered users (note that metric also includes inactive users). This estimate is based on the available numbers from providers and a conservative exploration of others. Regardless of the precise number, the trend is clearly visible: Scooter sharing is rapidly growing in urban centers.



Online engagement has doubled

Apart from measuring the number of registered users, we are tracking the number of Facebook likes to get an approximation of customer awareness and as an early indicator for usage developments. As of August 2019, more than 430,000 people liked the service pages – with a rising tendency. This is almost double the amount of Facebook likes than 12 months ago. Interestingly, the operator GoShare from Taiwan (run by Gogoro) already placed 10th despite not having started the service until mid-August.

Method: Only individual operator pages with focus on scooter sharing are counted; no aggregated pages which mainly offer other services such as e.g. car sharing.

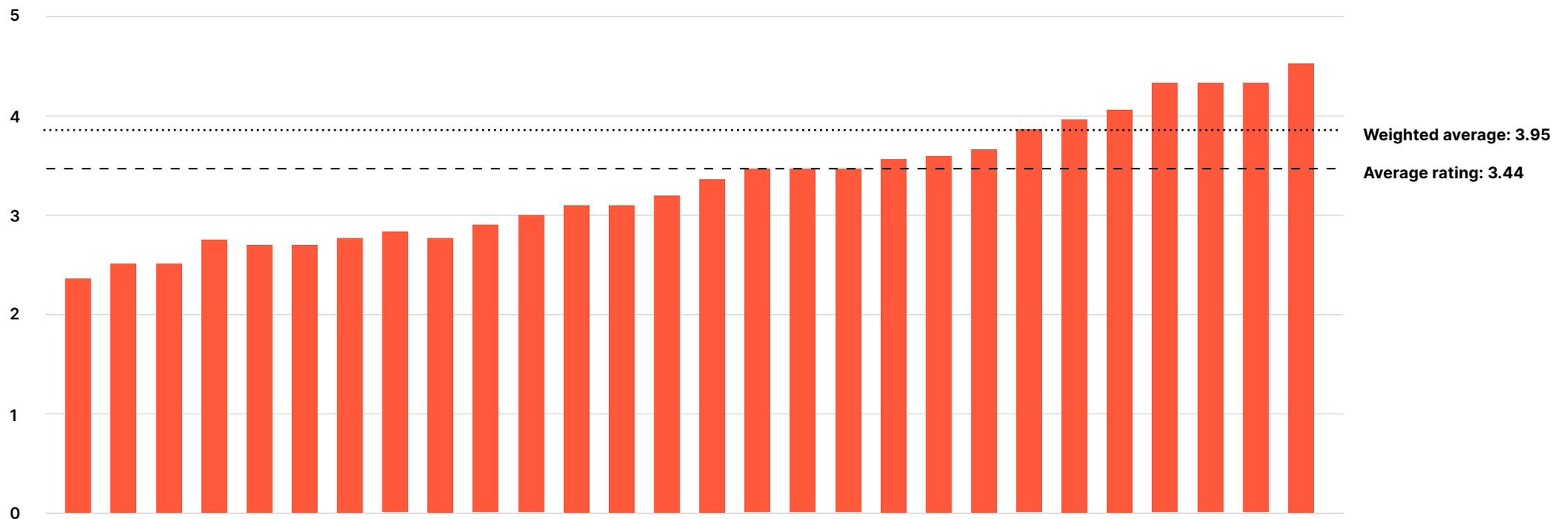


The most popular Facebook pages are Bounce (India), eCooltra (Spain/Italy/Portugal) and Blinkee (Poland and beyond).

Established operators have the best customer satisfaction

It is hard to measure customer satisfaction without conducting classic surveys. One way to close in on the topic is measuring app ratings in stores. The graph shows app ratings of Android apps of scooter sharing operators worldwide with more than 50 reviews. We opted to just display Android since the OS is relevant globally, whereas some markets (e.g. India) mainly rely on Android. The average rating is 3.44 based on 28 apps with a high of 4.7 and a low of 2.4. The weighted average scores 3.95, which also takes into account the number of ratings. This means, that the more mature the operator is, the more likely it is to have a higher rating and therefore better app quality.

Android app ratings



Summary

- The scooter sharing market has grown extensively in the past year - **2019 is another record-breaking year for the sector.**
- There are approx. **66,000 shared scooters available globally** (41,000 more than one year ago).
- **Scooter sharing is now available in 88 cities in 21 countries** and has become a global trend.
- Even though the European market is dominant (>50% of deployed scooters), the Indian market went through a giant, unparalleled push. **Today, up to 30% of the global fleet is in India.**
- We estimate almost 5 million customers globally.
- The top 5 operators own every second scooter: **Vogo, eCooltra, Bounce, Cityscoot and COUP.**
- **Almost all scooters outside India run with electric engines.** Scooter sharing is electrifying urban transport!
- In 2019, the most relevant electric scooter manufacturers in the sharing business were **Govecs, Askoll, NIU and Gogoro.**
- Industry trends in 2019 were **large fleet increases**, further introduction of **multimodal fleets** and **small-scale price increases.**
- **For 2020, we expect continued global growth.**

Imprint

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