Global Moped Sharing Market Report 2020

unu

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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 moped sharing.
The primary focus of this report is to give a status update on the global moped sharing market for 2020. By reviewing publicly available data and conducting market research, this report is the most comprehensive overview in the industry. This year we additionally interviewed some selected experts on the trend topics.

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 moped sharing and electric mopeds in particular for several years now and want to facilitate a better access to the market by publishing this report. We are happy to share with you the second edition of the unu Global Moped Sharing Market Report.

All data of the report data was analyzed as of August 16th 2020. Hence it is a snapshot of the market for one moment in time.

Setting the stage

Mopeds 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 moped sharing market has been growing year-on-year, with 2020 being no exception. The market has never been bigger.

This report solely focuses on **electric and combustion mopeds**, as pictured on the left.

We define moped sharing as the **shared use of mentioned mopeds, where operators enable customers to rent mopeds spontaneously and directly through the use of a smartphone**.

We explicitly did not cover the long-term rental market or sharing of moped-styled bikes.

We researched with as much energy and care as we could. But given the nature of complex market datasets, we might have overlooked a certain operator or under- or overestimated a fleet size. We are always happy if if you point us towards new operators in the market.

To better distinguish the market in terms of research, we renamed the report this year - from ‘scooter’ to ‘moped’.

Despite COVID-19, 2020 was yet another year of very strong growth for the sector

104,000 mopeds or more
+38,000 since 2019 (+58%)

9 million registered users
+4 million since 2019 (+80%)

28 moped manufacturers
-6 since 2019 (-18%)

76 operators
+22 since 2019 (+41%)

22 countries
+1 since 2019 (+5%)

122 cities
+34 since 2019 (+39%)

A year in review

Dec 2019: COUP ends service
No more COUP in Germany, France and Spain. One of the largest operators drops out and is looking to sell their assets.

Feb 2020: Barcelona moped tender
First tender phase complete. 21 operators receive a license.

Feb 2020: TIER buys defunct COUP fleet
First large scale kick scooter sharing operator enters the sector with several thousand mopeds.

Mar/Apr 2020: COVID hits large parts of the world
Travel restrictions, hard lockdowns, and behavioral uncertainty of travellers followed. These measures impacted the moped sharing sector. Rental numbers dropped massively in all fleets.

Utilization rate recovery
After a lockdown-related drop in the number of rentals in almost all global markets, the fleet usage strongly picked up again.

Q2: Indian market shift starts
The Indian sharing market started to shift towards long-term rental.

End of Q2 2020: Continued growth
The market reached almost 100,000 mopeds.

Aug 2020: Revel introduces additional safety measures
21 question test, helmet selfie, partially automated customer suspension and a community reporting tool.

Aug 2020: Barcelona
10 operators are live by now. Scoot Networks stopped their service.

A year like no other: COVID-19

2020 was the year of COVID-19. This holds also true for moped sharing. And to emphasize the industry development right in the beginning: Despite COVID, moped sharing continued to grow. 38,000 mopeds were added in the past 12 months.

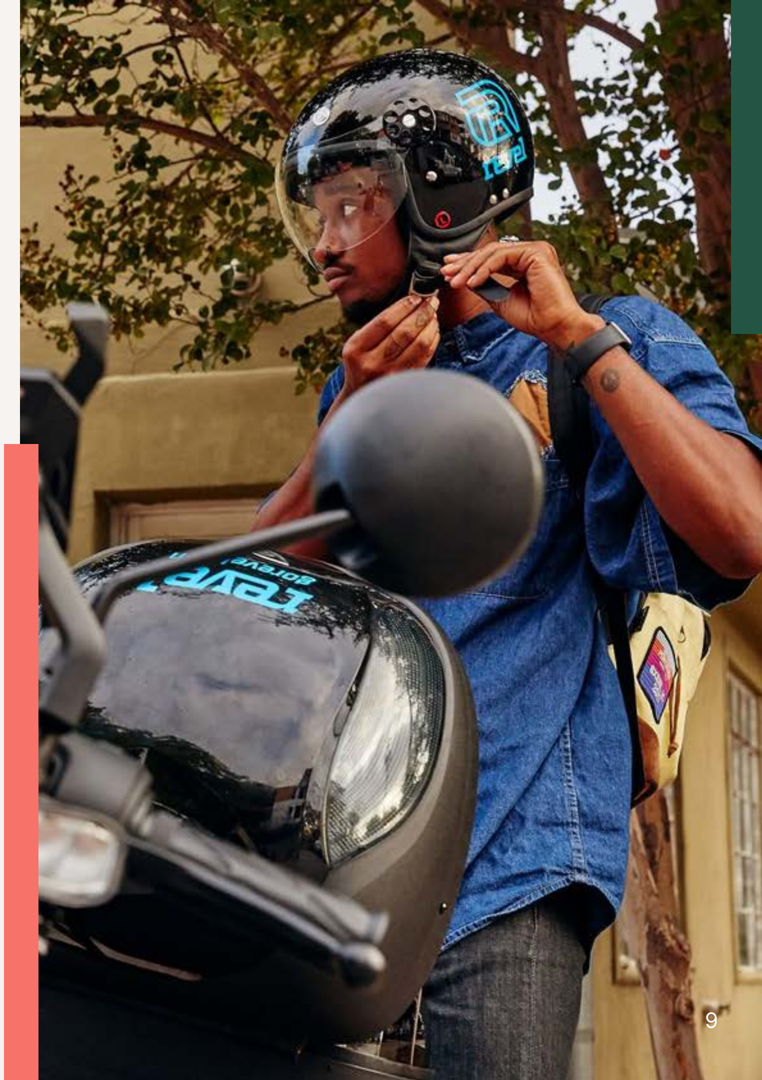
But 2020 also came along with a lot of **uncertainty, painful city lockdowns, mobility behavior changes and activity reductions, fleet service pauses, pivots, business adaptations or free rides for health service personal** to name a few corner stones which impacted moped sharing. Some fleets were basically inactive for several weeks. The pandemic hit most of the analyzed markets and continues to impact them. This report will cover the continued market growth despite the challenging times.

Mopeds

The number of mopeds has increased by 58%

This year, operators added another 38k mopeds. The number of vehicles now strongly exceeds last year's 66,000. Today, there are more than **104,000 mopeds** in shared mobility fleets available to customers.
The highlight of 2020 was surely the strong recovery of rental numbers after the COVID dent in Q1/Q2.

#resilience #dynamicyear



Every second moped is owned by one of the top 5 operators

Bounce, Acciona, Vogo, eCooltra and Cityscoot own 49% of the global moped sharing fleet.

BOUNCE acciona VOGO eCooltra Cityscoot

The other 71 operators share 51% of the remaining global fleet. Each of the top 5 operators deployed more than 6,000 scooters (so did WeMo and Revel). The top 10 operators almost own 3 out of 4 global shared mopeds (71%).

The total number of global moped sharing operators grew by 41% from the last 2019 report to this report.

The 10 biggest moped sharing companies are highlighted in the following two pages.

Top 5 operators are spread across 5 different markets

BOUNCE

First major sharing operations: 2018/19

Number of mopeds in sharing: up to 15,000*

Markets: India

History: Bounce scaled most of the fleet in 2019. We saw quite some shift to long-term rental in 2020 which appears to be more permanent. All business units together have >30k mopeds.

acciona

First major sharing operations: 2018

Number of mopeds in sharing: 13,000

Markets: Spain, Italy

History: Acciona is the most recent growth factor of the industry. Most of the recent expansion started in 2019/2020. Today, they own the largest European fleet and aim for further expansion.

VOGO

First major sharing operations: 2018

Number of mopeds in sharing: up to 10,000*

Markets: India

History: Vogo is a second Indian heavyweight player, having scaled most of its fleet in 2019. Gathered more than 100m USD from Ola in 2018/19. Offering moped sharing and rental services.

Cityscoot

First major sharing operations: 2015/16

Number of mopeds in sharing: 6,700

Markets: France, Italy, Spain

History: Cityscoot started by focusing on the French market before entering Italy in 2019. In 2020 they entered the heavily contested city market of Barcelona (10 operators).

eCooltra

First major sharing operations: 2016

Number of mopeds in sharing: 6,700

Markets: Spain, Portugal, Italy

History: eCooltra is an early adopter of moped sharing. They have a huge customer base in many cities and achieved a high level of customer acceptance.

*Exact number unclear due to overlappings with other units such as long-term rental. Overall fleet size (incl. other units) is larger than the mentioned value. The current business model shows signs of shifting towards long-term rental only. Therefore this value is an estimate.

5 more companies on places 6 to 10 own another fifth of the mopeds

First major sharing operations: 2016

Number of mopeds in sharing: 6,500

Markets: Taiwan

History: First moped sharing operator in Taiwan and to date also the biggest.

First major sharing operations: 2018

Number of mopeds in sharing: 6,000

Markets: USA

History: Revel dominates the US market. Strong growth in 2019 and new cities in 2020 (Oakland/San Francisco). Many service improvements and a strong focus on safety measures.

First major sharing operations: 2019

Number of mopeds in sharing: 4,000

Markets: Taiwan

History: GoShare is the sharing platform of moped manufacturer Gogoro. Fast scaling in the second half of 2019.

First major sharing operations: 2019

Number of mopeds in sharing: 3,800

Markets: Taiwan

History: Latest entry in the Taiwanese moped sharing trias (WeMo, GoShare, iRent). Its strong card is the origin in carsharing and therefore the multimodal fleet.

First major sharing operations: 2020 (moped)

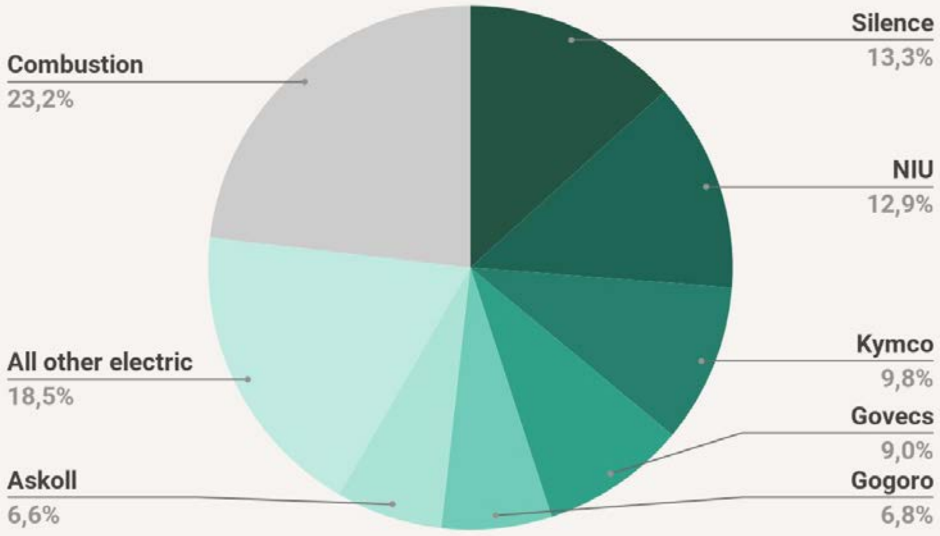
Number of mopeds in sharing: <3,000

Markets: Germany

History: TIER bought the defunct COUP fleet (TOP 5 operator of 2019) of Gogoro mopeds in early 2020. Being also one of the biggest kick scooter sharing operators globally, TIER is one of the strongest global multimodal micromobility operators.

77% of all shared mopeds are electric

99-100% are electric in most markets, but India.



*All electric moped manufacturers with more than 5% market share are named in the chart. Sum can differ from 100% due to rounding. To attribute the early electrification efforts of the Indian fleet, we estimated 5% of the major Indian fleets to be electric. This is an educated guess, based on expert talks, but is hard to confirm.

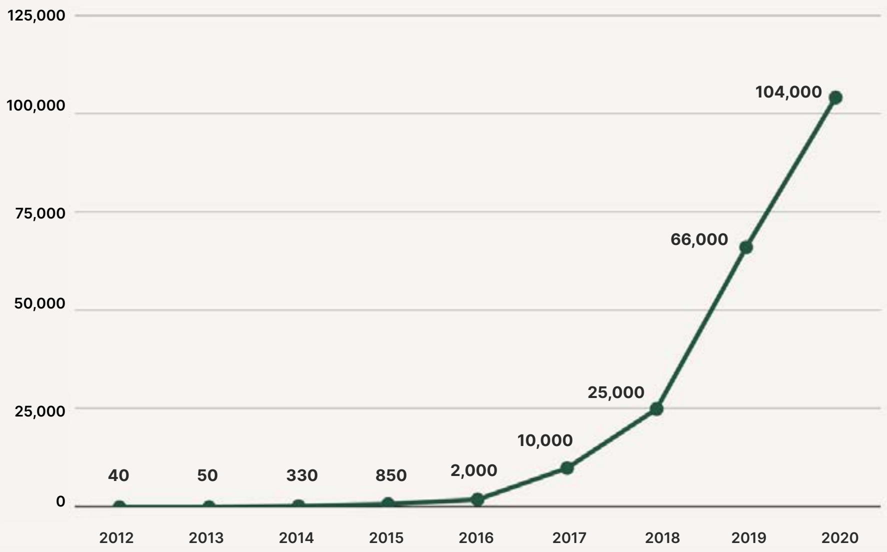
28 manufacturers currently provide mopeds for the sharing market

Electric mopeds dominate the market strongly. Europe, the US and Taiwan (three of the four main markets) are almost entirely electric-only markets. India relies on combustion mopeds for the time being. But also the Indian market shows strong signs of electrification. Vogo and Bounce are working on increasing the number of electric mopeds in the future.

As of today, the most important individual electric moped brands for sharing are Silence, NIU, Kymco, Govecs, Gogoro and Askoll. Other manufacturers include Vmoto Soco, Torrot, emco, Yadea and at least 15 more electric moped manufacturers.
On the combustion side the main suppliers are mainly Honda, as well as TVS and Yamaha.

In 2020, we saw a small concentration process in the moped supplier space: The total number of manufacturers in the industry declined by 18%.

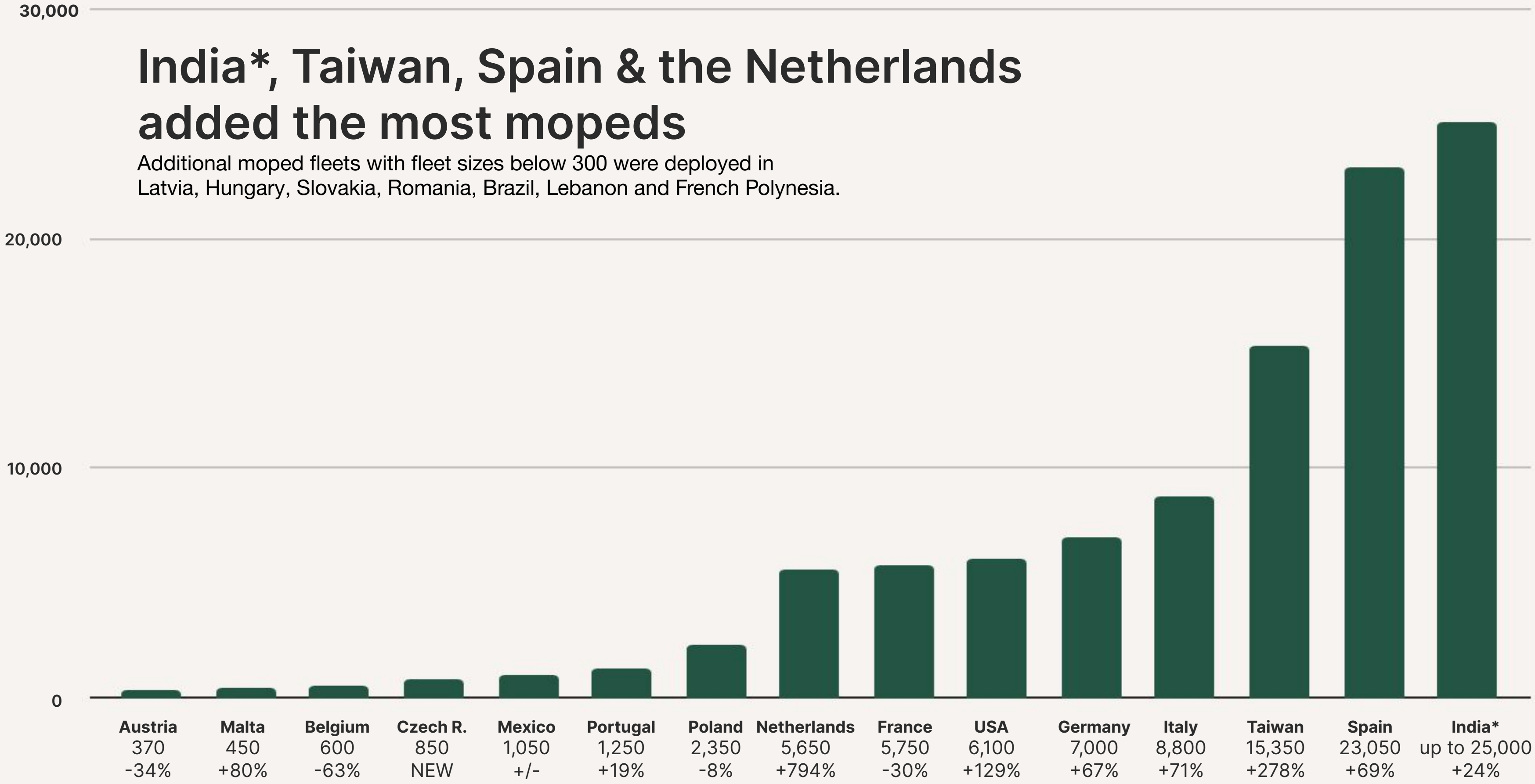
The global number of mopeds is on the rise



Country distribution

India*, Taiwan, Spain & the Netherlands added the most mopeds

Additional moped fleets with fleet sizes below 300 were deployed in Latvia, Hungary, Slovakia, Romania, Brazil, Lebanon and French Polynesia.



*Exact number unclear due to overlappings with other units such as long-term rental. Major proportions of the Indian fleet are currently shifting towards long-term rental only.

India, Spain and Taiwan are the biggest country markets

This year, only four out of 22 countries saw shrinking fleet sizes.

15 out of 22 countries are located in Europe and account for 54% of the deployed fleet (2019: 58%). India alone accounts for 24% of the fleet, Taiwan for another 15%.

Only 7% of the global shared mopeds are not distributed in Europe, India or Taiwan. These are located in USA, Mexico, Brazil, Lebanon and French Polynesia. Four new countries entered the scene in 2020: Czech Republic, Latvia, Slovakia and Brazil*. Three dropouts were detected (Switzerland, Sweden, Croatia).

*Brazil started actually already earlier, but we missed them in last year's report.

Widespread in Europe, but big fleets in Asia and the USA

Just 18 of 122 moped sharing cities are not in Europe. Germany (26), Poland (23), the Netherlands (19) and Spain (9) have the most moped sharing cities. Especially the Netherlands were a very strong growth candidate over the last year.

Therefore, Europe is strongly leading in the number of cities which have moped sharing available. However, the average fleet sizes are far bigger in India, Taiwan or the US.

The 18 cities which are not located in Europe are located in North America (8), Asia (7), South America (1), Middle East (1) and Oceania (1).

Note: The distribution of moped sharing cities globally doesn't correlate with the number of deployed mopeds. In terms of deployed mopeds, India, Spain and Taiwan dominate the market (see page 17). Roughly, every second moped is located in Europe.

Who comes after Europe?

Ok, Europe has the most active moped sharing cities, was the first market to massively grow and still offers the biggest fleet to customers. But here are the three most important markets that follow:

India

India's moped sharing fleet exploded in 2019 and appeared for the first time as a major player in last year’s report. Unlike in Europe, the Indian market is very concentrated (Bounce and Vogo dominate) and moped sharing remains focussed on a few cities.
However, exact fleet size numbers are hard to obtain and the “classic” sharing model suffered quite a bit due to COVID. More importantly, we saw quite some shift to long-term rental in 2020. We estimate that in 2021 the sharing sector in India will be smaller (but moped use and rental will continue to boom).

Taiwan

Taiwan continues to grow year after year. And the market is characterized by high-level competition between four big players. More than 15,000 shared mopeds are stationed in the country, which is more than 15% of the global fleet.

USA

In 2019 and 2020, operator Revel pushed for expansion. They now operate in six metropolises with roughly 6,000 mopeds in total.
Second biggest operator was Scoot Networks, which ended service in mid-2020. Besides Revel, a few smaller operators run business. The US market is characterized by a less significant moped culture in urban transportation (compared to e.g. Europe). Therefore moped operators are also building up awareness for this transportation mode.

Deep dive: Cities

The biggest cities in terms of fleet size became **even bigger**

2019

15,000
Bangalore

6,300
Madrid

6,300
Paris

4,600
Barcelona

2020

22,000*
Bangalore

10,650
Taipei

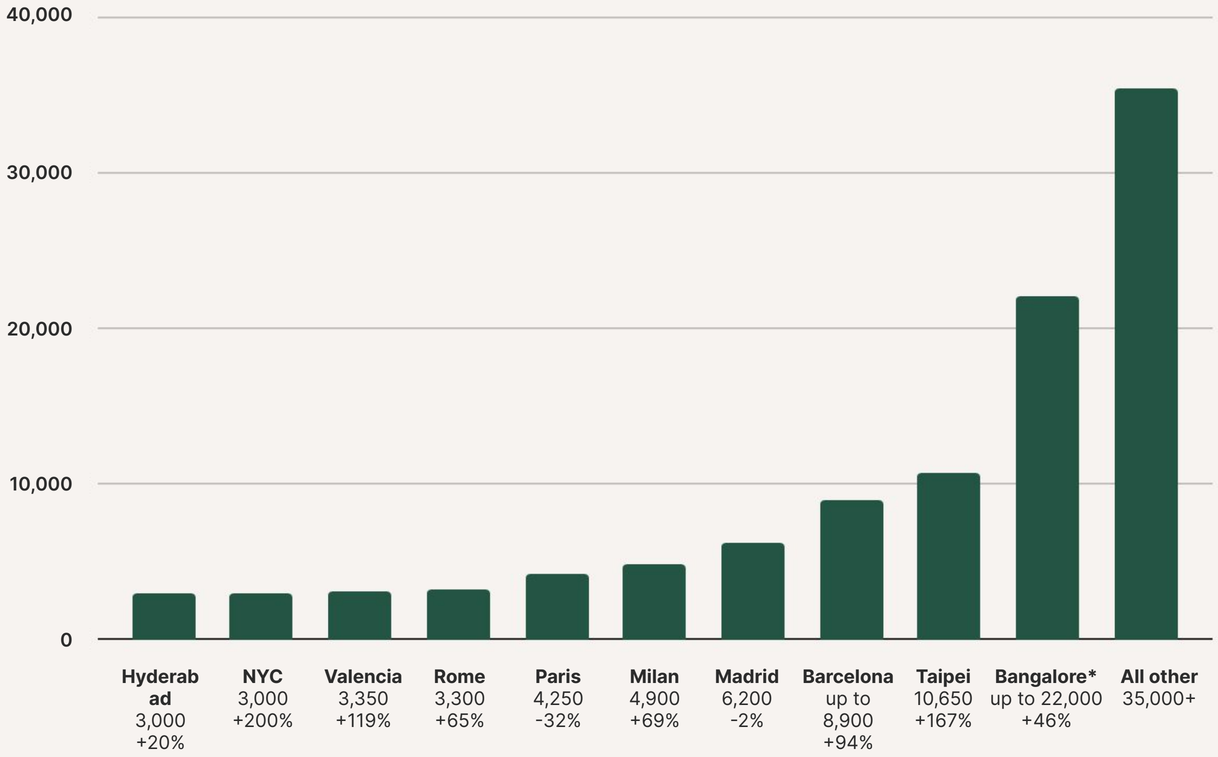
Up to 8,900
Barcelona

6,200
Madrid

*Exact number unclear due to overlappings with other units such as long-term rental.
Major proportions of the Indian fleet are currently shifting towards long-term rental only.

Taipei, NYC & Valencia had strongest relative growth

Paris impacted by COUP exit, Barcelona pushed by tender, Bangalore remains large (but Indian fleet operators also widen their business model to non-sharing related models*)



*Exact number unclear due to overlappings with other units such as long-term rental. Major proportions of the Indian fleet are currently shifting towards long-term rental only.

Hey Europe, why so many cities?

The widespread fleet numbers in some European countries can be explained by a high number of **micro-fleets**, fleets with e.g. 10, 50 or 100 mopeds. This is a very interesting development to bring moped sharing beyond the metropolises.

Jena, Breda, Kielce, Santa Cruz de Tenerife - we greet you.

City competition gets stronger

Of course, some cities are more attractive to operators than others – which naturally leads to competition.

The list is topped by:

1.	Barcelona	10 operators
2.	Milan	6 operators
3.	Valencia	5 operators
4.	Madrid	4 operators
5.	Kaohsiung	4 operators

The number and share of multi-operator cities with competition increased to 35 (29% of all cities) from just 20 (23%) in 2019.

A tale of Barcelona

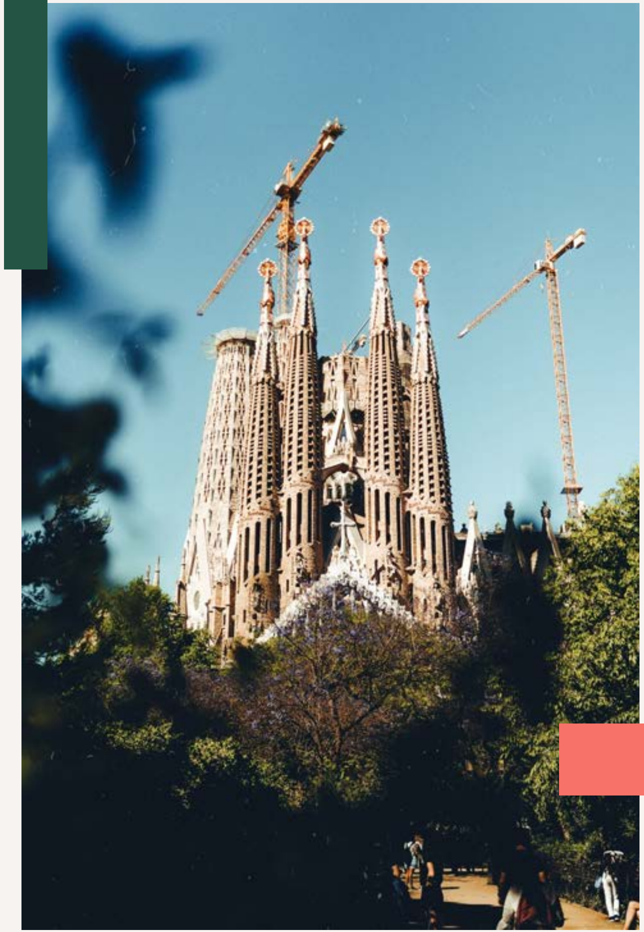
Barcelona holds the third biggest moped sharing fleet in 2020

We believe it is the **most interesting** to watch for two reasons:

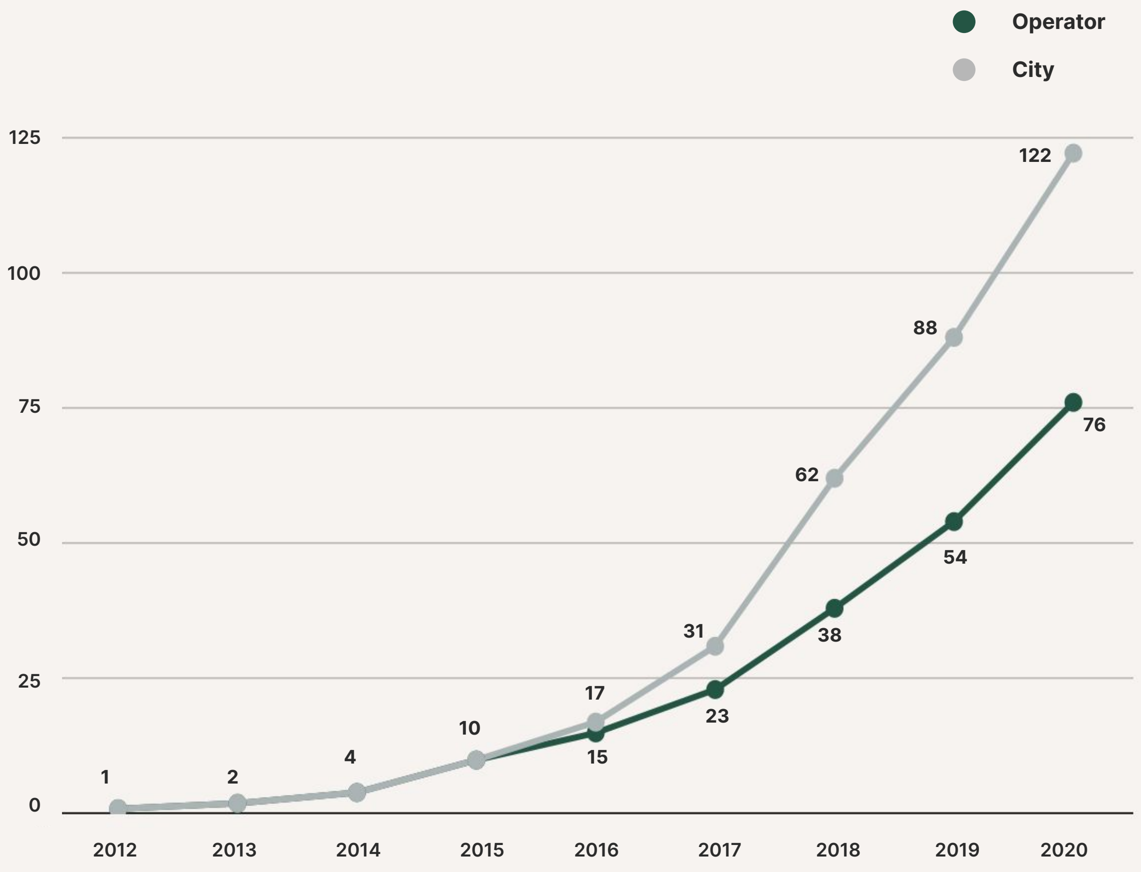
→ **Competition**
→ **Regulation**

In 2019, the municipality started a tender process. 21 companies were granted licenses initially. In the end, 11 operators started operations in the city. The tender has been criticised by some operators for providing too many licenses. Allowed fleet size might be increased further in the coming months. We expect less active operators in 2021.
What else? Learn from competitor USPs & see utilization in a highly competitive market.

Further reading: Barcelona license awarding, tender case studies Europe, all current operators at a glance



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



User

Up to 9 million users

Since 2019, the number of registered users grew by 81%.
User numbers (either registered or active) are hard to obtain. Some operators publish numbers, others don't.

unu estimates that there are **8.7 million registered users** in 2020 (note that metric also includes inactive users). This estimate is based on the available numbers from providers and a conservative exploration of others.

No matter if the factual number is closer to 8 or 9 million users: Moped sharing has never seen more new faces. Many users registered for the first time.

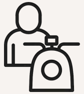
1.8 million 2018

4.8 million 2019

8.7 million 2020

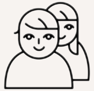
Moped sharing users tend to be male, young and urban

The market will grow beyond its' current user base. More and more operators implement user diversification measures and specifically address other population groups in product development.



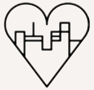
Male

Many operators report registration and/or use ratios, which are leaning towards male users. We often hear that 3 out of 4 users are male. There are quite some good reads on the topic. We recommend to dig in.
On the employee/operator side: According to Canada-based movmi.net, 22% of the transportation workforce is female and of those less than 3% are in a CEO position. Today the gender bias is more often and louder addressed by the industry (e.g. by the network 'Women in Mobility' or the webinar series 'Women of TIER').



Young

If you look closely on the campaign shots of the operators you'll notice that most users are young. Operators report on an average age around 30-35 years. One big operator reported in 2019, that 3 out 4 users are younger than 45.



Urban

Most of the moped sharing schemes are located in big cities. This fact does not come as a surprise. However, we believe that moped sharing has the potential to grow beyond city centers and are curious if and how moped sharing operators will continue to go beyond the metropolises.

Trends & interviews

We have spotted five trends:

1. City regulation & tenders
2. Business model diversification
3. Competition
4. Rider awareness
5. Multimodal fleets

Telling the story behind the data

We want to go beyond pure statistics and share our thoughts on the hottest trends from the past year. Since the report can be just compiled thanks to the valuable input from the industry we also - for the first time - invited selected experts to share their thoughts on some of our most pressing questions.

Trend #1 City regulation & tenders

Tenders became a thing in 2020

This year, changes in regulation were definitely a topic.
For the first time in years, the topic has gained relevance in multiple cities. While moped sharing operators in many global cities are not facing strong regulation, things turned out differently in some global shared mobility hotspots. Some regulation schemes have puzzled sharing operators, others were seen as a success.
Especially, the recent changes in Barcelona have left some operators devastated (compare page 26). Especially dutch cities are also increasingly implementing or considering tender processes (e.g. Amsterdam). The Dutch approaches have been met more positively by the industry.

We talked with **Paul van Merrienboer** from CHECK (operating in the Netherlands) how he sees the development and what makes a good tender.

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Interview with
Paul van Merrienboer

Managing Director of CHECK (Netherlands)

How do you cooperate with cities?
It is our ambition to achieve seamless integration in cities. Both for our users as well as for non-users we should make lives easier. This is only being achieved in close cooperation with the policymakers in cities. In general, we cooperate on two topics: minding the public space and share insights and data. We for example recently launched our 'Parking Checker' in close cooperation with cities in order to facilitate proper parking behavior by our community. We also connect to real time dashboards for policymakers in order to assess the efficiency of our service. In the end, durable results can be only achieved when working together on mutual objectives.

Which city regulation approaches did you encounter so far? What are your learnings?
Every municipality sets its own regulations but in the end, the topics we come across are similar: agree on service areas, the maximum number of mopeds, safety measures, complaint regulations and integration in mobility applications. Some municipalities first develop policy and then grant permits in order to operate in the city for a restricted period of time with a restricted number of vehicles. Other cities first experiment on a small scale with a number of operators and set their policies afterwards: more of an MVP approach. In the end both routes are feasible but I believe the latter offers better policies since it is based on 'real life' experience instead of a theoretical framework.

Dutch municipalities are increasingly betting on tenders when it comes to moped sharing operations. How do you see that development?
It is a sign that the market is becoming more mature. Also in the smaller tier-2 cities. The great advantage is that it gives clarity to all parties. The important condition in this matter is that the quality of the application of the operator is the differentiator in distributing 'scarce' permits. One condition in my perspective is that markets are not cast in concrete for a very long period of time. New entrants should be able to join and grow.

For the city representatives reading this report: What makes a good tender?
Ask the operators to join for a market consultation to think along within the frames and objectives of the municipality. Having this open mindset from both parties push more feasible and creative results in execution. Don't copy and paste too much.

Trend #2 Business model diversification

The moped sharing business model is still dynamic

There are so many nuances to shared mobility business models. More aspects have been added to the operator portfolio. Some are exotic, others become more and more standard. In 2020, we saw discussions around dynamic pricing, AI-based fleet balancing, food and parcel delivery as well as co-branding, among other aspects. But due to COVID, we saw two major topics quickly gaining ground:

- **Long term rental:** Major operators such as Bounce quickly utilized the potential of long-term rental during the high-impact months during the first wave. This business model diversification is expected to remain.

- **Subscription:** Quite a large number of mobility companies experimented with subscription-based models to build-up long-term relationships with customers. Within moped sharing, we see more openness to new pricing schemes, such as monthly subscription fees.

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Interview with
Oriol Marimon-Clos

B2C General Manager at Cooltra Group
(includes eCooltra in Spain, Italy, Portugal)

Do you perceive a diversification in business models (coming from a classic free floating scheme with minute-based pricing) in the global moped sharing sphere?
Yes, it is not only price per minute anymore. Operators are trying to have a stronger and longer relationship with users including a new set a diversified services to match user needs and fleet availability.

Did your business model change in the past years?
We, as Cooltra, have been in the industry for 15 years already and knew from the beginning that is was a matter of time to merge the 'per minute' and the 'per hours/days' use cases. We are now offering Rental Pass (per hours/days) and already testing monthly subscriptions for specific use cases. We are also a multimodal sharing operator, since our bikesharing launch in Barcelona in June 2020.

Are these business model alterations here to stay or will they prove just as COVID-19-induced pilots?
In our case all these changes were included in our roadmap before COVID-19 appeared, so they are here to stay. The current pandemic situation has only accelerated and created new use cases where such variations make even more sense than before.

How will the moped sharing business model look like in five years?
More than a moped sharing business model, it will probably be a micro mobility model that will include several vehicle types to satisfy user needs at a bigger extend. Three new things will be part of these models: charging do-it-yourself hubs to reduce operational costs, biometrics for rider validation at rental start and traditional moped manufacturers.

Trend #3 Competition

Attractive cities become more contested

Barcelona (10 operators). Milan (6). Valencia (5). Madrid (4). Kaohsiung (4). Competition is arriving on a next level.
The Taiwanese and the European market are currently seeing the highest level of competition. As described on page 25, the number and share of multi-operator cities with competition increased to 35 (29% of all cities) from just 20 (23%) in 2019.
From small local players in tier-2 and tier-3 cities, to corporate startups in major metropolises, the sector has seen quite a development in the past years.
We are estimating an increasing number of multi-operator cities in Europe throughout the next years.

We have been discussing related topics like corporate startups and operator size with **Acciona** on the next page.

→ Interview next page

Would you consider yourself a corporate startup? What are the benefits of your setup?

Interview with
Filippo Brunelleschi

Head of Expansion of Acciona Mobility (Spain, Italy)

Would you consider yourself a corporate startup? What are the benefits of your setup?
Acciona is a very solid corporate company, with almost 90 years of history, about 40,000 employees in more than 60 Countries. On the other hand we could say that the mobility vertical has internal business characteristics which are similar to those of a startup: we are agile, we scaled fast, we are data oriented and we have a solid internally developed tech.

What can you learn from smaller, local sharing startups and vice versa?
I believe each company has its own perks and tries to interpret the business its own way, therefore I guess learnings go both ways. We always applied a solid business vision to the approach we have with the mobility market, we know it is a very competitive one and therefore requires a very high efficiency at all levels, in order to make it a viable and scalable model. If a company has limited resources, creativity becomes more relevant in all aspects of the business and its operations, but we are pretty smart in that sense as well.

How can the industry increase the adoption and implementation speed of moped sharing schemes worldwide?
Besides its mobility vertical, Acciona is a recognised worldwide leader in sustainable business models, for this reason we strongly believe that the future of mobility is going to be connected, electric and shared. We are constantly working towards this goal and we know that is it going to be a matter of education and evangelization of both governments and people. Privately-owned ICE vehicles are expensive assets which stay parked for over 95% of the time. It is not a viable solution today and it will make even less sense going forward. Acciona is constantly working and supporting local authorities and city councils to allow citizens easier access to shared mobility solutions and limit parking and circulation of private ICE vehicles.

Who do you expect to enter the moped sharing world in the coming years and compete with you?
The business model of moped sharing is peculiar and at the moment is mostly concentrated in Europe, where we already have a number of players. Within the coming years I foresee a market consolidation, M&As and in general less but stronger players. Large ride sharing players have shown interest in asset sharing but mostly within micro-mobility. Having said that we have our own roadmap about mobility solutions, apart from moped sharing.

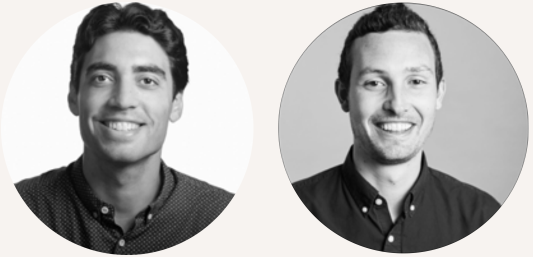
Trend #4
Rider awareness

Innovative measures for continuously increasing awareness

A moped participates in traffic and encounters various other vehicles and modes throughout the ride. Some of the covered moped sharing markets have well-known moped cultures such as Spain, Italy or the Netherlands. In other markets car, transit or bikes might hold more importance. Building ridership awareness is therefore a crucial focus which operators have taken care of for years by for example offering test rides, in-person lessons and other measures.

We believe that this is slowly taken to another level. This year in August, Revel implemented far-reaching additional safety measures. It included a mandatory 21 question test, helmet selfies, partially automated customer suspension (in case of repeated violations) and a so-called community reporting tool among other smaller measures (personal helmet offer for 35 USD, etc.). Very thorough – in that depth it is an industry first. Different markets and moped/traffic cultures need different awareness building approaches. But we can imagine how this could be picked up by more operators in the coming years.

→ **Interview next page**



Interview with
Frank Reig & Paul Suhey

Co-founders, CEO & COO of Revel (USA)

What do you perceive as the major differences between moped sharing in Europe and the US?
The main difference between the markets is that we need to do more education to US consumers about the vehicle type and its use case. Europeans have grown up with mopeds while US consumers have not, requiring us to focus our efforts to 'get butts into seats'. In both markets, once anyone tries the service, they're hooked!

You recently introduced new safety measures, can you briefly explain what these are?
Our new safety measures include a mandatory in-app safety training, a helmet selfie that riders and their passengers must complete before each ride, an in-app community reporting tool that members and non-members alike can use to report bad behavior, expanded availability for in-person lessons in every market we operate, and a section on our website/app where you can buy your own US DOT-approved Revel helmet. We've also implemented a GPS-based system to automatically detect and alert our teams when a rider enters a park, or travels the wrong way down a one-way street.

Did you proactively introduce these or have these become imposed to you by local authorities?
For mobility companies safety is always an iterative process, and we are proud to be leading the industry on new product features. We accelerated some of these efforts over the course of this summer, and added the new safety enhancements across all of our markets. We worked in close coordination with all local authorities on these features, to ensure that we met their needs as we scaled our product across the US.

In what ways have these measures changed and/or impacted your operations and business?
We're designing a new layer of transportation in dense urban environments, so we must think for the long-term and not worry too much about short-term impacts. In addition to the benefits to consumer safety, adding these features have helped discussions with our regulator and insurance partners.

Trend #5
Multimodal fleets

Operators continued to add more vehicle types

We had this trend already included in last year's report. And as you can see - we believe it is a lasting trend. It includes moped sharing operators, which add for example kick scooters or bikes, as well as other shared mobility operators, deciding to introduce mopeds to their fleets.

The list of multimodal fleet operators has been growing and by now includes e.g. eCooltra, TIER, iRent, YEGO, Blinkee, GoVolt, Poppy, GoTo, Indigo Weel and Movo.

This trend is expected to continue in 2021. We foresee new operators joining the club as well as operators from above list to potentially add further modes.

We discussed the trend with **Lawrence Leuschner (CEO at TIER)** on the next page.

→ Interview next page

Interview with
Lawrence Leuschner

Co-founder & CEO of TIER (Germany & Europe)

After starting the journey with kick scooters, you introduced mopeds over the course of the last 12 months - what was your primary motivation for this?
Becoming multimodal was a very important step in getting closer to our goal to build a platform that provides end-to-end mobility solutions from a single source which are in line with demand and offer a variety of different means of transport.

What are the different usage patterns that you see? Do you see any?
What we see is that in most cases it is a question of distance which of our modes of transport are chosen by our customers. Our e-scooters are mostly used to cover distances between two and three kilometers. For longer rides it is our e-moped that is more popular.

Did you see significant customer growth with the introduction of multimodality?
The integration of e-mopeds has definitely enabled us to address a larger and broader target group with our service. About half of the e-moped customers come to us as new customers.

What is the biggest challenge you see in multimodality?
Besides the technical integration into the app, the biggest challenges that come with adding new vehicles to an existing fleet are connected to streamlining operational tasks like the exchange of batteries. But the benefits for customers to be able to choose the ideal mode of transport from a single source far outweigh the challenges.

Summary

The moped sharing market has continued its success story in 2020. Despite the strong COVID-dent in spring 2020.

Fleet size continued to grow, whereas the utilization rate needed to recover from the COVID uncertainty over the course of the year.

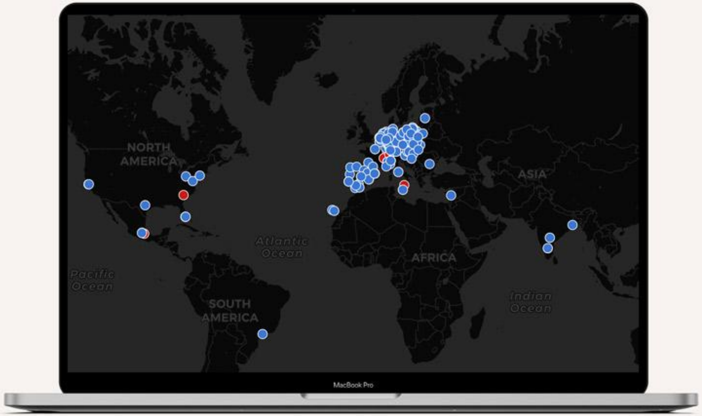
- There are now approx. 104,000 shared mopeds available globally (38,000 more than one year ago).
- Moped sharing is now available in 122 cities in 22 countries.
- Even though the European market is dominant (54% of deployed mopeds), the Indian (24%) and Taiwanese (15%) market are close behind. However, the Indian market is currently trending towards long-term rental.
- We estimate up to 9 million customers globally.
- The top 5 operators own every second scooter: Bounce, Acciona, Vogo, eCooltra and Cityscoot

Almost all mopeds outside India run with electric engines. Moped sharing electrifies urban transport.

- The most relevant electric moped manufacturers in the sharing business were Silence, NIU and Kymco. The strongest supplier for combustion mopeds was Honda.
- Industry trends in 2020 were city regulation & tenders, multimodal fleets, business model diversification, increasing competition and strengthening ridership awareness.
- COVID-19 is not over, but the next wave takes place in the lower usage winter months for most markets. 2021 will most likely see further growth and continued recovery from the pandemic impact.

Global Moped Sharing Map

Constantly updated beyond the report



Check the full interactive map at share.unumotors.com or mopedsharing.com

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Suggested Citation:
Howe, Enrico & Jakobsen, Felix Jonathan (2020): unu Global Moped Sharing Market Report 2020

Credits

- page 5 & 18: YEGO, YUGO Urban Mobility SL, Carrer de Wellington, 94, 08018 Barcelona, Spain, www.rideyego.com
- page 7: Unsplash: Logan Weaver: https://unsplash.com/photos/gTyj_tABGsQ
- page 9: Revel, Revel Transit Inc., 68 3rd Street, Brooklyn, NY 11231, USA, https://gorevel.com/
- page 10: Acciona, ACCIONA MOBILITY, S.A., Avenida de Europa, number 18 Parque Empresarial La Moraleja, 28108 Alcobendas, Madrid, Spain, https://movilidad.acciona.com/
- page 14: Go Sharing, Go Sharing BV, Keweitstraat 12, 4181 CD Waardenburg, Netherlands, https://go-sharing.nl/
- page 19: eCooltra, Cooltra Motosharing, S.L.U, Reina Cristina, nº2 2º2ª 08003 Barcelona, Spain, https://www.ecooltra.com/
- page 24: Unsplash: Alev Takil: https://unsplash.com/photos/x2Or94kjaqo
- page 25: TIER, TIER Mobility GmbH, c/o WeWork, Eichhornstr 3, 10785 Berlin, Germany, https://www.tier.app/
- page 26: Unsplash: Jose Llamas: https://unsplash.com/photos/vIFSUW9HnH4
- page 29: felyx, felyx sharing B.V., Pilotenstraat 37, 1059 CH Amsterdam, Netherlands, https://felyx.com/

Many thanks to all the moped sharing industry experts that shared their data and insights for the study. Special thanks to our six interview partners Filippo, Frank, Lawrence, Oriol, Paul and Paul.

Big thanks also to our amazing colleagues/contributors for making this study possible.

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