



# SHARED MOBILITY INDEX

2020 STATE OF THE INDUSTRY



**fluctuo**  
Mobility intelligence

With support from

**Cityscoot**

**dott**

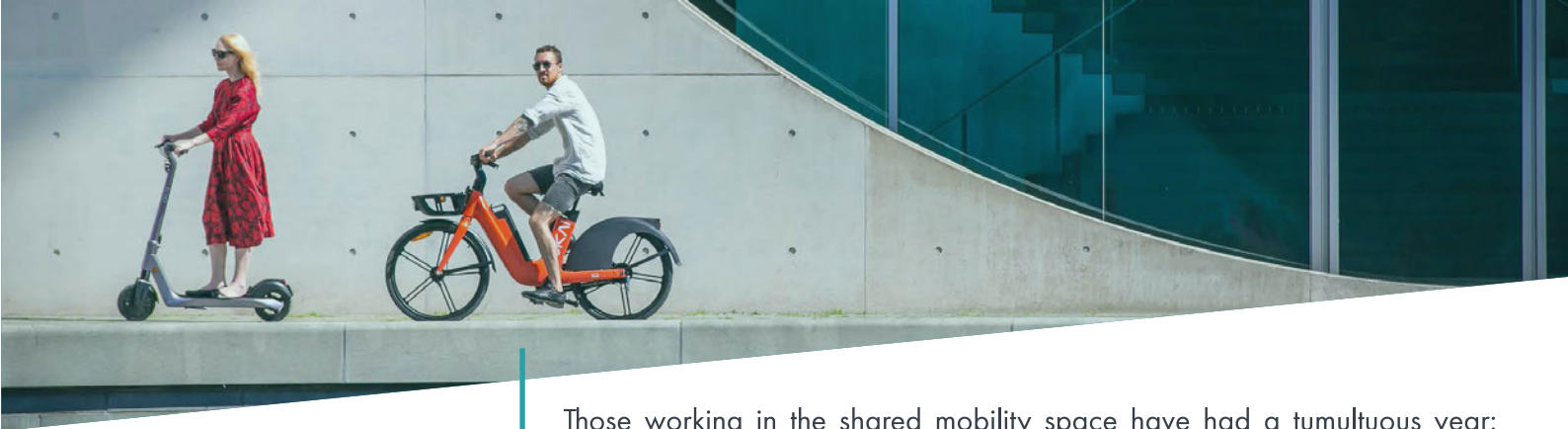
*smoove*  
facilitates sustainable mobility

**SMOVENGO**

**velib'**  
METROPOLE

**TIER**





# €150 MILLION IN REVENUE

Those working in the shared mobility space have had a tumultuous year:

- A public transportation strike, which boosted usage at the start of the year
- A national lockdown that led to an almost total cessation of activity
- A solid period of growth between June and September
- And a slow end to the year...

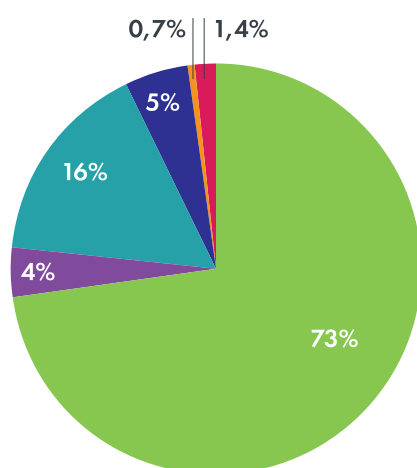
Two key figures to remember from 2020:

**80 million trips / €150 million in revenue<sup>(1)</sup>**

(1) Estimate of revenue generated by users, excluding subsidies paid by local authorities.

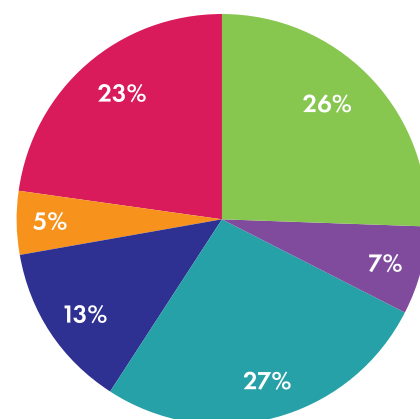
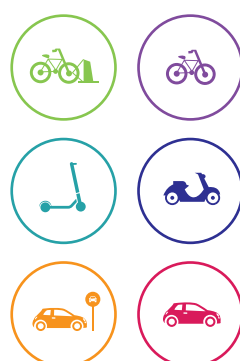
## DISTRIBUTION OF TRIPS

2020 Estimate: Around 80 million trips



## DISTRIBUTION OF REVENUE

2020 Estimate: Around €150 million

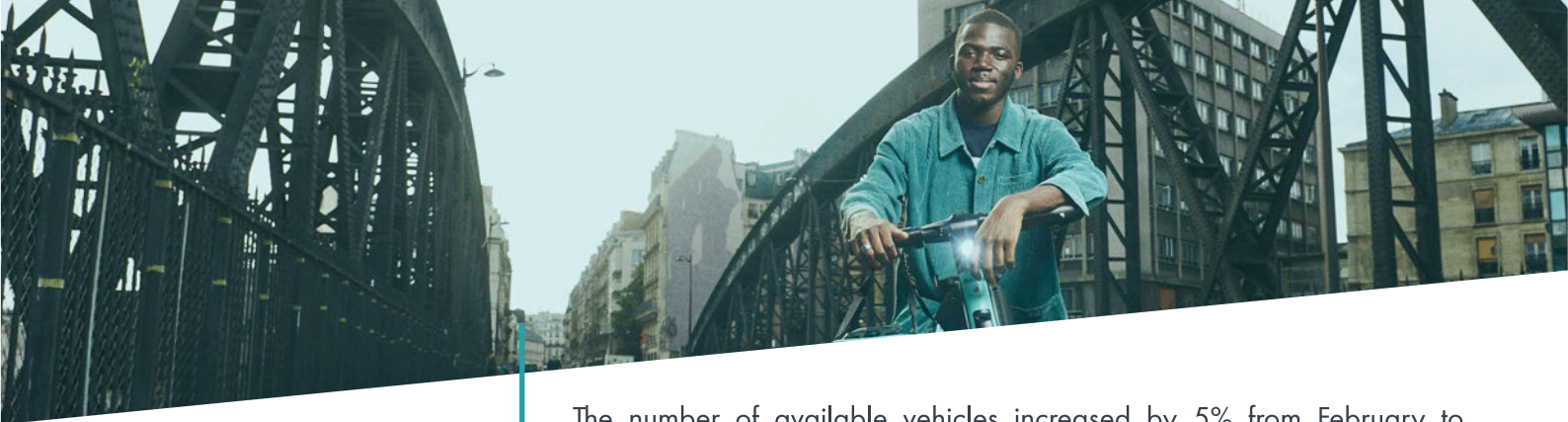


Station-based bike services represent 73% of total trips made, but only 26% of user revenues. Station-based bike services account for 73% of total trips but only 26% of user revenues. This is explained by an economic model based mainly on subscriptions (low cost because very often subsidized) offering almost unlimited trips. By way of comparison, the revenues generated by shared scooter services are equivalent to those of station-based bikes, but with fourfold fewer trips made. Car-sharing services represent 28% of total revenue for only 2% of total trips.

## AVERAGE PRICE AND DURATION OF TRIPS

All taxes included

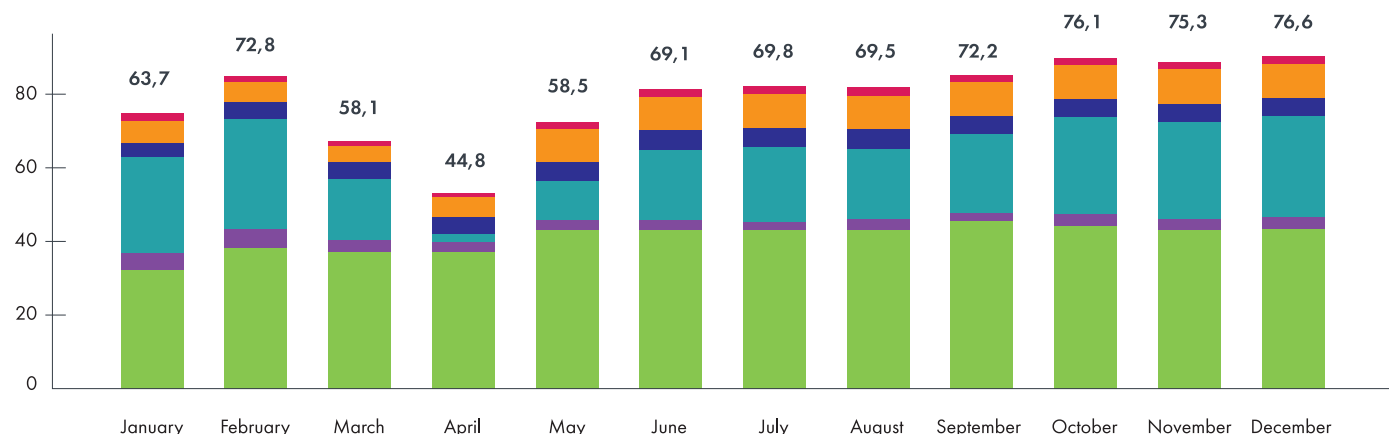
<span style="color: green;">●</span> <b>Bikes</b> (station-based)	0,7 € TTC	20 min.	<span style="color: blue;">●</span> <b>Mopeds</b> (free-floating)	4,5 € TTC	16 min.
<span style="color: purple;">●</span> <b>Bikes</b> (free-floating)	3,5 € TTC	14 min.	<span style="color: orange;">●</span> <b>Cars</b> (station-based)	40 € TTC	3 hours or full day
<span style="color: teal;">●</span> <b>Scooters</b> (free-floating)	3,2 € TTC	12 min.	<span style="color: red;">●</span> <b>Cars</b> (free-floating)	12 € TTC	35 min.



# 5% MORE VEHICLES IN 2020

## EVOLUTION OF VEHICLE NUMBERS IN FRANCE

in thousands



## NUMBER OF VEHICLES

total and average per 10,000 inhabitants

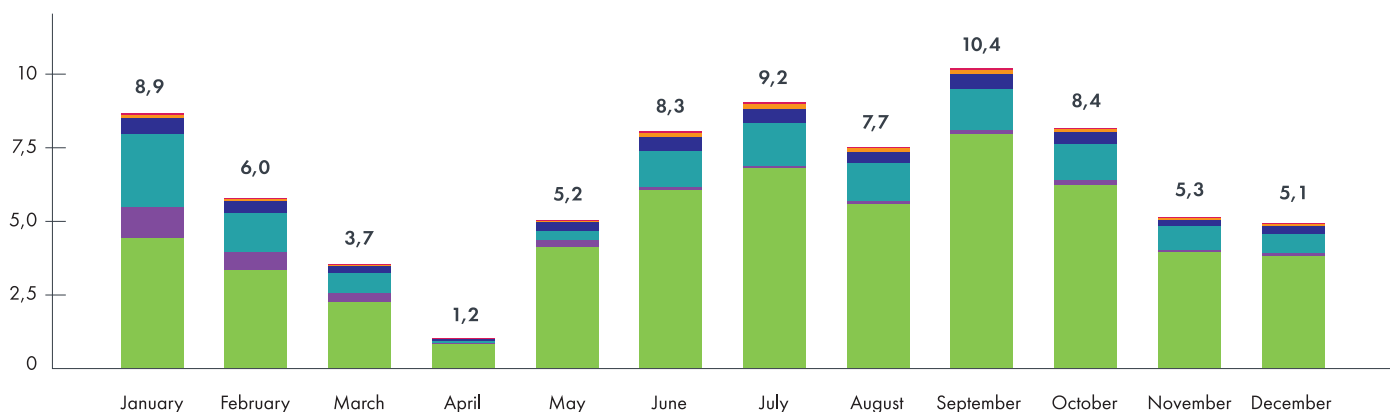
SERVICES	PARIS incl. 3 border departments 5 cities	CITIES +200,000 inhabitants 10 cities	CITIES 100,000-200,000 inhabitants 25 cities	TOTAL CITIES 40 cities
Bikes (station-based)	19,500 74	14,500 32	3,300 20	37,300
Bikes (free-floating)	2,000 8	500 7	200 5	2,700
Scooters (free-floating)	14,000 54	7,500 42	1,200 26	22,700
Mopeds (free-floating)	3,000 11	1,100 10	0	4,100
Cars (station-based)	5,200 20	2,200 6	350 2	7,750
Cars (free-floating)	1,500 5	200 1	50 3	1,750

Number of vehicles in cities with available services, as of December 2020. ● Average number of vehicles per 10,000 inhabitants

# 80 M TRIPS IN 2020

## EVOLUTION OF NUMBER OF TRIPS

in millions



## NUMBER OF TRIPS

Total and average number of trips per vehicle and per day

SERVICES	PARIS incl. 3 border departments 5 cities	CITIES +200,000 inhabitants 10 cities	CITIES 100,000-200,000 inhabitants 25 cities	TOTAL CITIES 40 cities
Bikes (station-based)	2,600,000 ● 4,3	1,270,000 ● 2,8	110,000 ● 1,1	3,980,000
Bikes (free-floating)	62,000 ● 1,0	13,000 ● 0,8	2,000 ● 0,3	77,000
Scooters (free-floating)	430,000 ● 1,0	182,000 ● 0,8	61,000 ● 1,6	673,000
Mopeds (free-floating)	208,000 ● 2,2	37,000 ● 1,1	0	245,000
Cars (station-based)	37,000 ● 0,2	35,000 ● 0,5	ND	72,000
Cars (free-floating)	48,000 ● 1,0	ND	ND	48,000

Number of trips in the relevant cities in December 2020. ● Average number of trips per vehicle and per day.





# 2020 IN REVIEW

1

## 2020 was an atypical year in many ways.

It began with the public transportation strike (started in December 2019), which had a strong impact on the usage of shared mobility services in the Paris area. From March 17<sup>th</sup>, a first strict national lockdown was put in place; many operators withdrew or reduced their vehicle fleets, causing a sharp drop in the use of those services. In autumn, a curfew followed by a second national confinement led to an overall drop in use, much less significant however than in March-April.

- **December 5<sup>th</sup> 2019 - January 20<sup>th</sup> 2020**  
Public transit strike.
- **March 17<sup>th</sup>**  
Start of first national lockdown in France.
- **May 11<sup>th</sup>**  
Lockdown is lifted.
- **October 17<sup>th</sup> and 23<sup>rd</sup>**  
Curfew instituted.
- **October 30<sup>th</sup>**  
Start of second national confinement.
- **November 28<sup>th</sup>**  
Loosening of confinement.
- **December 15<sup>th</sup>**  
Lockdown lifted, curfew maintained.

2

## The change in number of trips made reflected a real roller coaster of a year!

- **January**  
Heightened use due to the public transportation strike.
- **February**  
A dip back to normal.
- **March-April**  
An almost total stop.
- **Mid-May**  
A rapid restart of traffic.
- **Until September**  
Regular growth until September, and then a record high of more than 10 million total trips.
- **And a gentle slope to the end of the year**

For operators, these significant variations in usage can be complicated to manage (team planning, supply of spare parts). But generally speaking, they were able to maintain their fleets at an adequate level and react quickly to government decisions. This demonstrates the flexibility and efficiency of the operation teams that have been put in place to manage these services.

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## The shared mobility sector is very dynamic.

But it is sometimes difficult to assess its health, as the decisions made by operators can send contradictory signals.

In May 2020, Renault launched its Zity car-sharing service in Paris. Three months later, the Bolloré group ended the BlueLy (Lyon) and BlueCub (Bordeaux) car-sharing services after several years of operation.

In the free-floating bike sector, there has also been a back-and-forth of service providers. Mobike disappeared from circulation in the spring. In June, Jump withdrew 3,000 bikes from Paris, but the service (taken over by Lime) was relaunched in July with a fleet of 2,000 bikes. Bolt launched in Paris in June and withdrew in September. Indigo Wheel pulled out of Tours and Angers in the fall.

## Cities can use their authority to take shared mobility in very different directions:



Bordeaux regulates the size of each operator's fleet (100 scooters, 600 bikes, 200 mopeds max), but welcomes them all. At the end of December, there were no fewer than nine scooter operators and three free-floating bike operators in Bordeaux.



Paris, Lyon, and Grenoble have opted for tenders in order to limit the number of operators and the number of vehicles in circulation.



**June 2020 / Results of the call for tenders in Grenoble**  
Tier (500 scooters) and Pony (500 bikes).



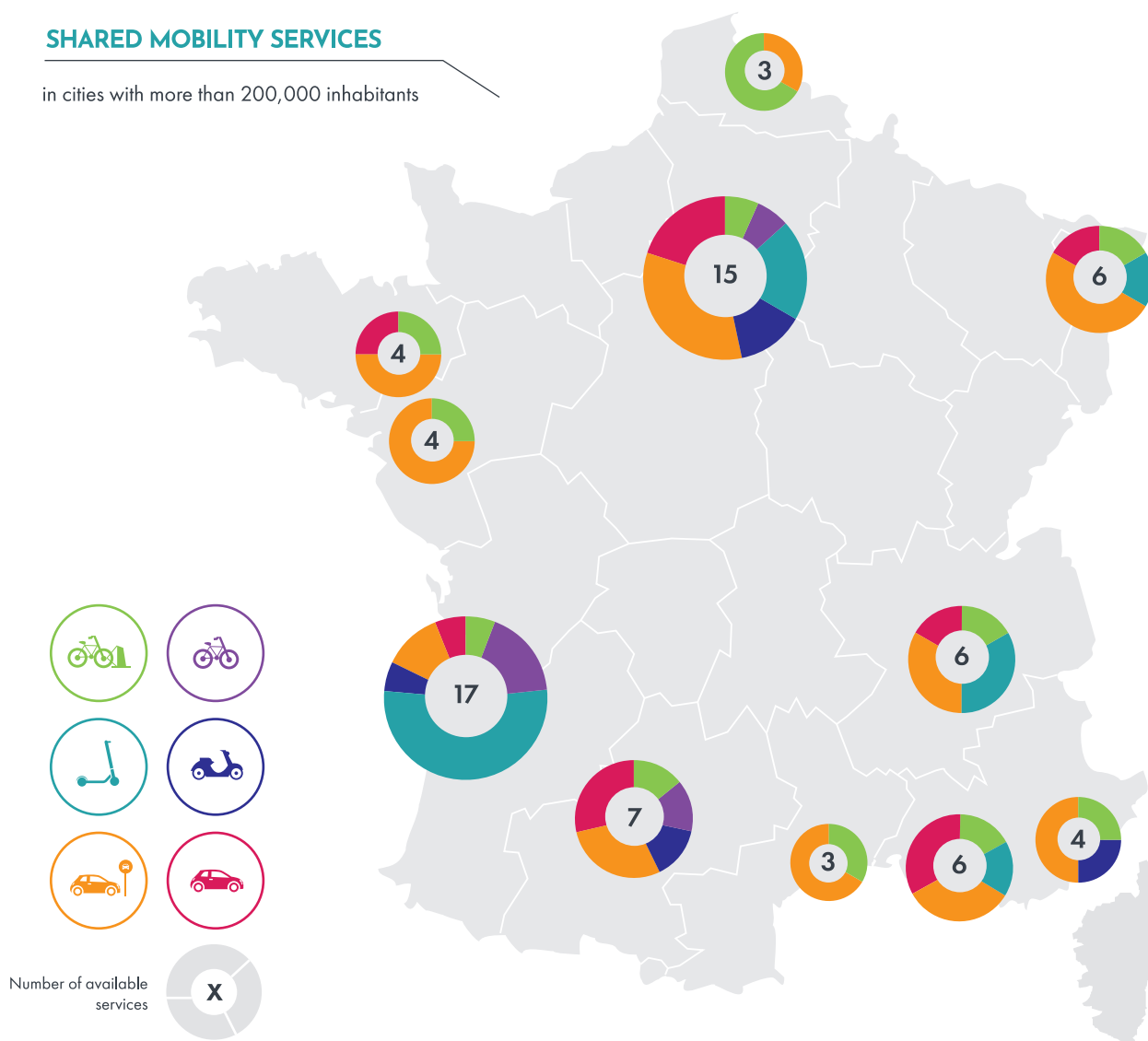
**July 2020 / Results of the call for tenders in Paris**  
Dott, Lime, and Tier (5,000 scooters each).



**July 2020 / Results of the call for tenders in Lyon**  
Dott and Tier (2,000 scooters each).

## SHARED MOBILITY SERVICES

in cities with more than 200,000 inhabitants





5

Despite the difficulties they faced in 2020, European shared mobility operators **continue to attract investors**:

- **February 2020**  
Cityscoot raises €24 million.
- **November 2020**  
Tier (Germany / shared scooters and mopeds) raises \$250 million.
- **December 2020**  
Voi (Sweden / shared scooters and bikes) raises \$160 million.
- **December 2020**  
Bolt (Estonia / ride-sharing ; shared scooters and bikes) raises \$180 million.

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2020 also saw **the completion of several MaaS platform projects**, launched by both public and private stakeholders:

- In its app, **Uber** offers its ride-sharing service, but also Lime / Jump bikes and scooters, as well as CityScoot mopeds.
- **The Moovizy application** launched in Saint-Etienne, including station-based bike services (Vélivert by Smoove), carpooling, and car-sharing (Citiz).
- **SNCF launched the new version of its SNCF assistant application** in partnership with fluctuo. It now includes shared bike and scooter services in five French cities.

## HIGHLIGHTS

DECEMBER 2020



**December 16<sup>th</sup> / Bordeaux**  
**Jawls** is the 9<sup>th</sup> scooter operator to launch.

















**December 18<sup>th</sup> / Carcassonne**  
Smoove launches **Cyclolib**, a station-based bike-sharing service.

# TOP 3 FRENCH CITIES <sup>(1)</sup>

(1) Ranking determined by fluctuo based on the number of vehicles per 10,000 inhabitants.

## PARIS







2,630,000 inh. <sup>(2)</sup>

SERVICES	OPERATORS	TOTAL NUMBER OF VEHICLES	NUMBER OF VEHICLES per 10,000 inhabitants
Bikes (station-based)		<div><div></div></div> 19,500	<div><div></div></div> 74
Bikes (free-floating)		<div><div></div></div> 2,000	<div><div></div></div> 8
Scooters (free-floating)	  	<div><div></div></div> 14,000	<div><div></div></div> 54
Mopeds (free-floating)	 	<div><div></div></div> 3,000	<div><div></div></div> 11
Cars	      	<div><div></div></div> 5,200	<div><div></div></div> 20
TOTAL	15	43,700	

(2) includes inner suburbs cities : Boulogne-Billancourt, Saint-Denis, Argenteuil, Montreuil
















## LYON

517,000 inh.

SERVICES	OPERATORS	TOTAL NUMBER OF VEHICLES	NUMBER OF VEHICLES per 10,000 inhabitants
Bikes (station-based)		<div><div></div></div> 4,500	<div><div></div></div> 48
Scooters (free-floating)	 	<div><div></div></div> 3,500	<div><div></div></div> 53
Cars	  	<div><div></div></div> 500	<div><div></div></div> 8
TOTAL	6	8,500	

## BORDEAUX

254,000 inh.

SERVICES	OPERATORS	TOTAL NUMBER OF VEHICLES	NUMBER OF VEHICLES per 10,000 inhabitants
Bikes (station-based)		<div><div></div></div> 1,400	<div><div></div></div> 54
Bikes (free-floating)	  	<div><div></div></div> 400	<div><div></div></div> 17
Scooters (free-floating)	      	<div><div></div></div> 800	<div><div></div></div> 31
Mopeds (free-floating)		<div><div></div></div> 200	<div><div></div></div> 9
Cars	  	<div><div></div></div> 400	<div><div></div></div> 16
TOTAL	17	3,200	



# EXPERT OPINIONS



**Bertrand Altmayer**  
General Manager

**Cityscoot**



**As it was for all of those working in shared mobility, the year 2020 was a new challenge for Cityscoot.** The successive confinements had a brutal impact on our business, but also taught us important lessons:

**Resilience of demand:** Despite the shutdown in March-April, the number of Cityscoot trips quickly started to rise again, even reaching an all-time record for service use in September..

**New audiences:** Looking to socially distance, new users naturally turned to Cityscoot, a reliable alternative for mobility.

**Continued confidence in sharing:** The drastic hygiene measures applied by Cityscoot clearly reassured users concerned about sanitary conditions.

In addition, the health crisis was another opportunity for Cityscoot to demonstrate its commitment to the community: we provided free access to the service for healthcare providers, and donated 250,000 protection caps to the public hospitals in Paris in spring 2020.

Cityscoot held out in the face of adversity, solidifying its place among the shared mobility leaders in Europe with ambitious plans such as the launch of the service in Barcelona. This allows the company to approach 2021 with serenity and determination to strengthen its achievements and develop new uses. >>



**Alexander Souter**  
GM South-West Europe

**TIER**



**2020 has been a difficult year in many ways.**

Within the context of a global pandemic, TIER has shown its ability to adapt, and the strength of its economic and financial model, even achieving profitability. The ultimate social distancing tool, the self-service electric scooter experienced massive adoption after the first confinement and therefore an explosion in its use.

This year has enabled us to strengthen our presence in France, with significant development thanks to the success of the calls for tenders in Grenoble, Paris, and Lyon (increasing from 600 to 8,100 vehicles in France within just a few weeks). The end of the year saw TIER complete a fundraising round of \$250 million, allowing us to continue our expansion in France with the goal to extend our services to 15 new areas, to support companies in their mobility plans with Tier For Business, and to participate even more broadly in Europe as an economic actor through our revolutionary new charging structure, the TIER Energy Network.

We hope that in 2021, many cities will continue to adopt sustainable mobility services in order to provide their citizens with alternatives to private cars.





# EXPERT OPINIONS



**Nicolas Gorse**  
General Manager  
France & Belgique

**dott**



**The health crisis has shaken up our lives and our modes of transportation.** Thanks to our expertise and the control over our operations, we maintained a minimum of service during the confinement periods to allow people on the front lines to get around more easily, and offered a way of respecting social distancing to all our users.

We have continued our efforts to offer cities efficient and innovative mobility solutions that respect public space. These efforts have paid off: we are now profitable, and the cities of Paris and Lyon have chosen Dott as a trusted partner.

We will continue our work in 2021, strengthening our multimodal offering with our electric bikes designed by Dott and manufactured in Europe, and expanding our service to new cities. We will keep working to offer sustainable mobility accessible to all! 




**Benoît Yameundjeu**  
General Manager

**Smoove**  
facilitates sustainable mobility



**2020 was the year the bike came into its own as a fully-fledged mode of transport.** The explosion in use, encouraged by the creation of "corona lanes", has set a new precedent. The crisis has been a "cyclability accelerator" for most cities. As for bike sharing systems, while they were sometimes forced to close temporarily, they eventually came out stronger. In Paris, the Vélib' service welcomed new users as they left lockdown, registering record peaks in usage during the month of September (a record 215,000 trips on September 11<sup>th</sup>).

In 2020, Smoove also signalled the renewal of shared bikes offering with the unveiling of its Flex range, the first pilot of which was installed in Carcassonne in December. This new offering is fully in line with the trends anticipated for 2021.

In summary: despite everything, 2020 was a good year for active mobility, and 2021 will show the durability of the radical changes that events of 2020 initiated, with the advent of multimodality, interoperability, the integration of bike sharing services into public transportation offerings, the development of multiple incentives for active mobility, and the simplification and flexibility of offers. Without a doubt, 2021 will be the year of the "Velopolitain". 



# METHODOLOGY

This monthly index aims to provide a broad view of the shared mobility market across 40 French cities.

Its scope encompasses bikes, scooters, mopeds, and shared cars, available in a free-floating mode or via physical/virtual stations. Data used to produce this index have been collected: directly from the operators, via "open data" flows, or via an analysis of the relevant services' mobile applications.

Data from companies who contributed to the financing of this report have not received any special treatment. fluctuo checked the data's consistency before compilation, and they have been aggregated for publishing by type of service and category of city (characterized by number of inhabitants). All graphics and tables appearing in this report are the exclusive property of fluctuo. Their use is authorized subject to the notice of copyright.

## THANKS TO

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Nicolas Boutaud (Smovengo)  
Hugo Miramon and Alexandre Souter (Tier)

## PHOTOS CREDITS

Zity : ©ZITY Paris  
CycloLib : ©Julien Roche - Mairie de Carcassonne

## PARTNERS

### fluctuo

Mobility intelligence

**fluctuo is a start-up specialized in the collection, processing, and analysis of data from shared mobility services** (bikes, scooters, mopeds, and cars). In order to help its customers better understand the supply and usage of shared mobility services in more than 60 European cities, fluctuo aggregates data from 150+ services and makes it available via a real-time API, as well as a business intelligence dashboard.

[www.fluctuo.com](http://www.fluctuo.com)



Created in 2008, Smoove is a market leader in self-service bicycles in France (Avignon, Grenoble, Strasbourg, Montpellier, and especially Paris, for which Smoove is a supplier to Smovengo, operator of Vélib' Métropole), and internationally (Batumi, Moscow, Bangkok, Marrakech, Helsinki, Vancouver, Lima). Smoove has 50,000 bikes in circulation, including 19,500 Vélib'. Smoove continues to expand by capitalizing on its know-how in bicycle innovation.

[www.smoove.fr](http://www.smoove.fr)

### Cityscoot

Cityscoot started operating 150 free-floating electric scooters in Paris in June 2016, which can be easily booked through an app. Since then, it has progressively extended its fleet to 7,000 vehicles in Paris, Nice, Milan, and now in Barcelona! With more than 10 million trips recorded, Cityscoot is leading the European scooter sharing market.

[www.cityscoot.eu](http://www.cityscoot.eu)



Vélib' Métropole is now the largest service in the world for shared and station-chargeable electric and mechanical bikes. The Autolib' Vélib' Métropole union has been the supervisory authority for the service operator, which has been Smovengo since January 1<sup>st</sup>, 2018. Smovengo relies on employees and suppliers who are experts in cycling and logistics in order to promote sustainable and responsible production.

[www.smovengo.fr](http://www.smovengo.fr)

### dott

**Dott is a micro-mobility European operator founded by Maxim Romain and Henri Moissinac.**

Dott's mission is to free our cities with clean rides for everyone. Dott currently operates over 20,000 e-scooters in 15 top cities in Belgium, France, Germany, Italy, and Poland. We have made environmental excellence and safety priorities in our development.

[www.ridedott.com](http://www.ridedott.com)

### TIER

**TIER Mobility, European leader in electric micro-mobility.**

TIER's ambition is to offer a new vision of mobility based on innovation in order to propose mobility solutions respectful of the environment and public space, and its mission to accompany territories in their ecological transition.

[www.tier.app](http://www.tier.app)

## PRESS CONTACT

Aymeric Weyland / fluctuo | Phone: + 33 6 44 31 76 18 | Email: [aymeric.veyland@fluctuo.com](mailto:aymeric.veyland@fluctuo.com)