



EUROPEAN SHARED MOBILITY INDEX

POLIS CONFERENCE
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EUROPEAN SHARED MOBILITY INDEX

11TH EDITION // Q3 2023 REVIEW

Cities

33

Ridership YoY

+1%

Shared mobility services

356 (-52)

Fleet size YoY

-2%

THANKS TO OUR PARTNERS!



ARVAL
BNP PARIBAS GROUP

dröver

PBSC®
Urban Solutions



SEGWAY

SHARENOW

POLIS

- Station-based bikes (Physical stations)
- Dockless bikes
- Scooters
- Mopeds
- Cars

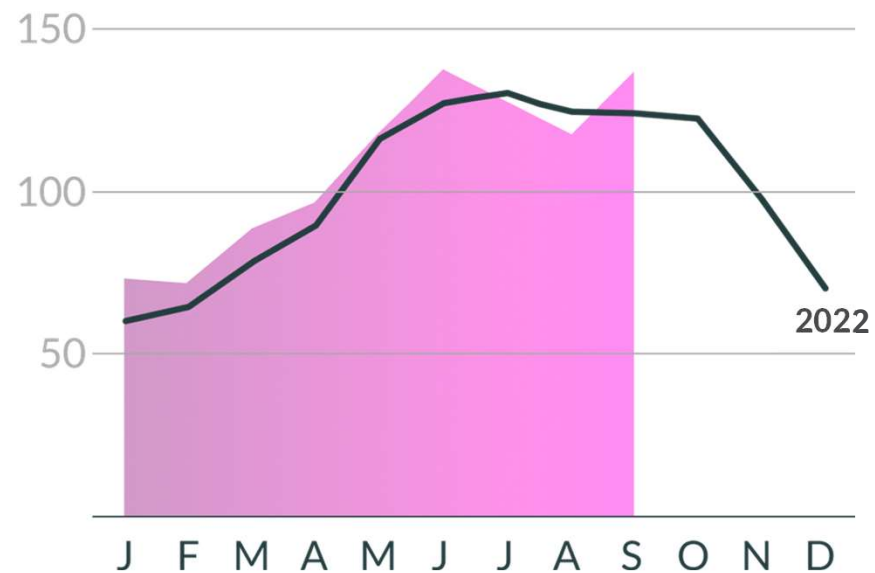


TOTAL RIDERSHIP

ANALYSIS ON 33 CITIES
SHARED MOBILITY SERVICES

YEAR-ON-YEAR RIDERSHIP

Base 100 | 2022 Average



+1% GROWTH

Q3 2023 VS Q3 2022

+4% GROWTH

2023 VS 2022

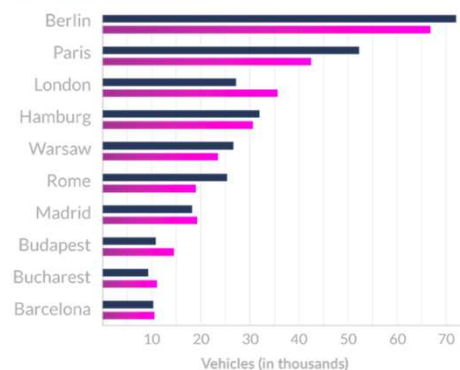
FLEETS PER CITY

ANALYSIS ON 33 CITIES SHARED MOBILITY SERVICES

QUARTERLY FLEET SIZE BY CITY POPULATION Q3 2022 VS Q2 2023

2023 2022

ABOVE 1.5M INH.



0.75M - 1.5M INH.

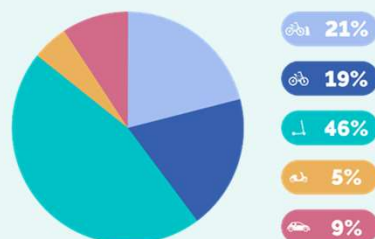


BELOW 0.75M INH.

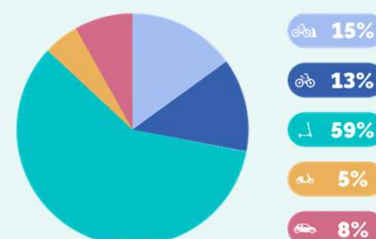


MODAL BREAKDOWN As of September 2023

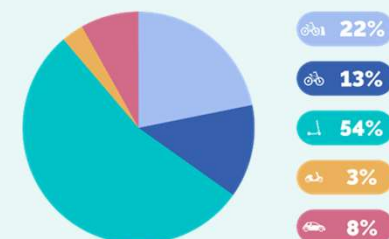
ABOVE 1.5M INH.



0.75M - 1.5M INH.



BELOW 0.75M INH.



AT A GLANCE FLEET & TRIPS

ANALYSIS ON 33 CITIES SHARED MOBILITY SERVICES

HIGHLIGHTS

Q3 2023 VS Q3 2022
(All modes)

Ridership
+1%

Fleet size
-2%

TVD

 **3.6** (3.6)

 **2.1** (1.8)

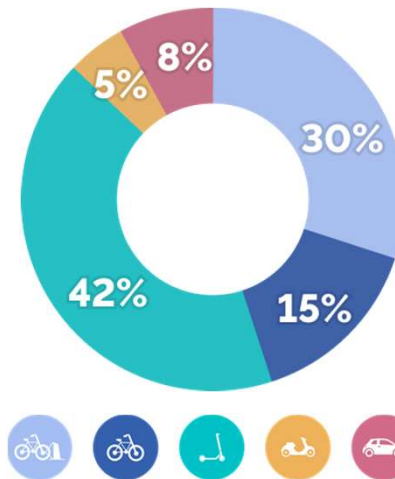
 **1.9** (2.0)

 **2.5** (2.4)

 **2.1** (2.2)

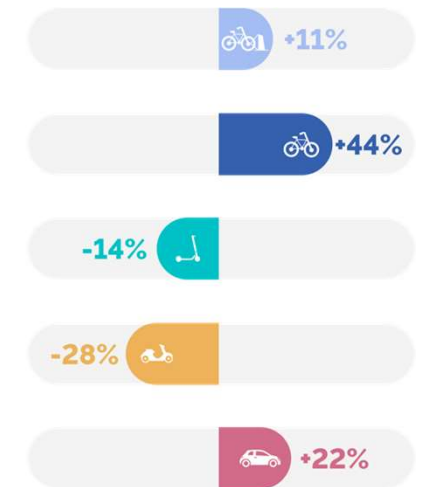
MODAL BREAKDOWN

Total ridership per mode | Q3 2023



RIDERSHIP GROWTH

Q3 2023 VS Q3 2022



MODAL BREAKDOWN

ANALYSIS ON BIKES &
SCOOTERS IN 33 CITIES



Ridership YoY
+18%

Fleet Size YoY
+14%

TVD (VS 2022)
2.9 (2.8)



Ridership YoY
-14%

Fleet Size YoY
-9%

TVD (VS 2022)
1.9 (2.0)

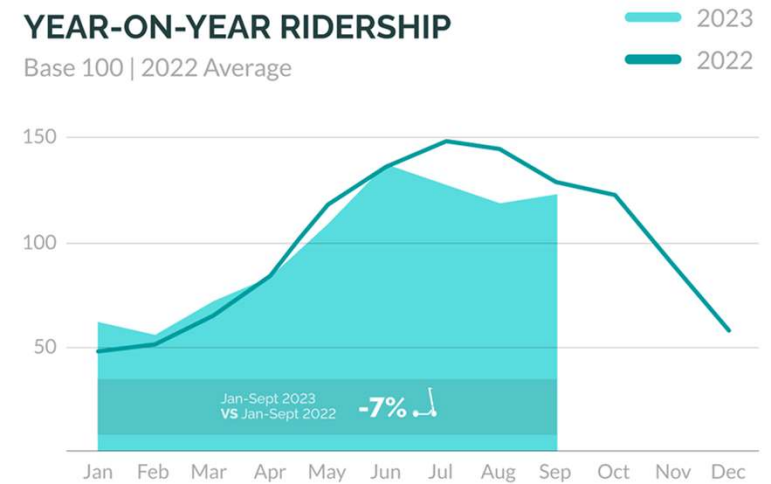
YEAR-ON-YEAR RIDERSHIP

Base 100 | 2022 Average



YEAR-ON-YEAR RIDERSHIP

Base 100 | 2022 Average





PROBLEMS BIKES & SCOOTERS

ANALYSIS ON BIKES & SCOOTERS IN 33 CITIES



- Cities securing funding for public bike schemes

- **Cities asking for a revenue share and city fees**



- Short contracts makes it hard for operators to fully commit to a city
- Very strict regulations making cities hard to run a high-quality service



MODAL BREAKDOWN

ANALYSIS ON BIKES & SCOOTERS IN 33 CITIES



- Use EU budgets to deploy public bike sharing schemes
- **Think about the operator's ability to generate revenue to run a profitable, high-quality service**



- Back operators for the long-term
- Regulate, don't over-regulate (create a win-win)



MODAL BREAKDOWN

ANALYSIS ON MOPEDS & CARS IN 33 CITIES



Ridership YoY
-28%

Fleet Size YoY
-33%

TVD (VS 2022)
2.5 (2.3)



Ridership YoY
+20%

Fleet Size YoY
+26%

TVD (VS 2022)
2.1 (2.2)

YEAR-ON-YEAR RIDERSHIP

Base 100 | 2022 Average



YEAR-ON-YEAR RIDERSHIP

Base 100 | 2022 Average



MODAL BREAKDOWN

ANALYSIS ON MOPEDS & CARS IN 33 CITIES



- Not habit-changing - hard to onboard new users
- (INTL) Expansions a challenge in economic climate

- **Vandalism**



- Lack of charging infrastructure for EVs
- Expensive parking fees

MODAL BREAKDOWN

ANALYSIS ON MOPEDS & CARS IN 33 CITIES



- Safety & testing days to encourage users
- Operators only to expand to markets that are low risk

- **Damage detection (identifying ‘bad’ users)**



- *Development of electric car sharing will progress (but slowly)*
- Give incentives for shared cars to park in regular parking spots

citydive

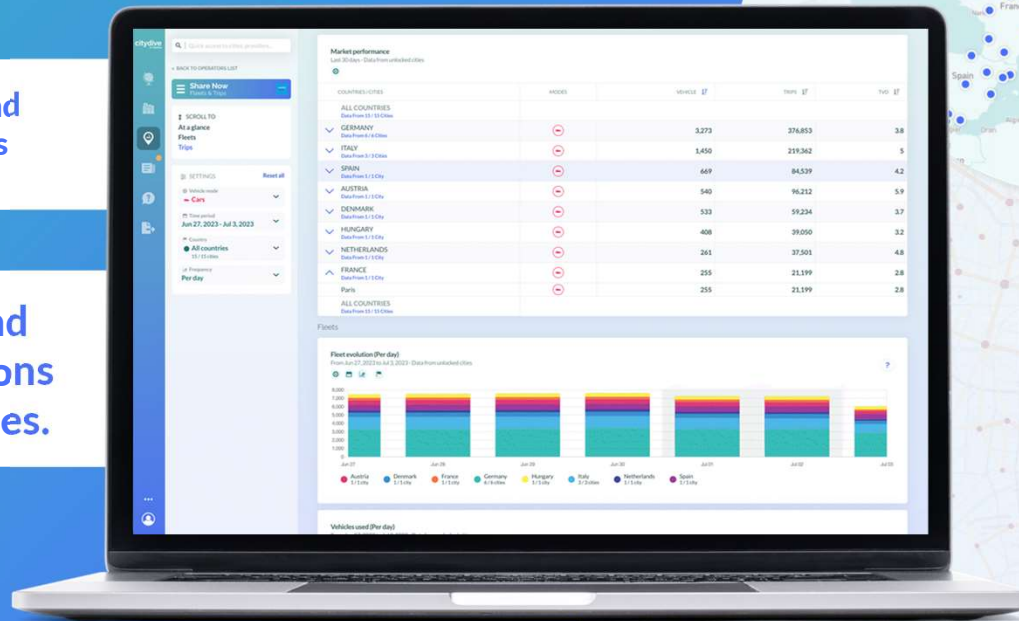
1 PLATFORM



Monitor 700 fleets and
80m trips in 200 cities



Analyse usage and
optimize operations
from 300+ services.










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-  **Toulouse**
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-  **Verona**

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