



# The Bike and Scootersharing Telematics Market

3rd Edition

*The Bike and Scootersharing Telematics Market is the third strategy report from Berg Insight analysing the latest developments on the connected micromobility markets worldwide. This strategic research report from Berg Insight provides you with 125 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.*

# The shared micromobility fleet to reach 38.2 million vehicles in 2027

Passenger cars and light trucks are the main modes of transportation in most industrialised countries. The vast majority of car trips in metropolitan areas are drive-alone trips with only one person in the car and vehicles are used for only about one hour per day on average. Bikes and scooters are shared micromobility services that have become available for people that want to complement other modes of transportation. Examples of other mobility services include traditional carsharing, carpooling, ridesharing, taxi and ridesourcing services. Many of these mobility services aim to decrease the cost of transportation, create convenience through fewer ownership responsibilities, as well as reduce congestion and environmental impact.

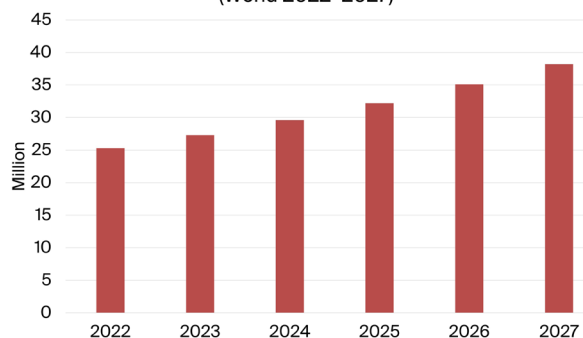
Micromobility includes shared mobility services in urban areas that offer short-term rentals of light vehicles such as bikes, scooters or other similar vehicles to paying members or communities. The services aim to reduce urban congestion as well as car usage and car ownership to improve the inner-city landscape and reduce air pollution. Usage is typically billed by the minute/hour with rates that include parking, fuel or charging and maintenance. The services are generally used for short trips between 0–10 kilometres. Bikes and scooters are a kind of decentralised bicycle rental service, usually focusing on short term rentals that supplements other modes of transport including walking and public transport. Scooters services offer motorised scooters. The vehicles are usually sit-down electric scooters or stand-up electric scooters. Today, most operators use two operational models – free floating and station-based. The station-based operational model enables members to pick up and return the vehicle at any designated station in a city. The free floating operational model is rapidly gaining users and rides. Free floating services mean that vehicles can be picked up and dropped off anywhere within a designated area.

New technologies in the form of telematics systems and smartphones are key enablers of bikes and scooters sharing micromobility services. Free floating services mostly encompass a telematics system that comprises an on-board computer and a telematics device for capturing trip data, enable fleet management and grant access to the vehicle through a smartphone app. Software platforms include complete systems that can support all the operational activities of a micromobility operation ranging from management of in-vehicle equipment, fleet management, booking management, billing, as well as operations supervision via dashboards and data analytics. Leading vendors of micromobility technology such as connected bike locks, infrastructure for station-based bikes and scooters sharing and software platforms include Conneqtech, Nextbike, Fifteen, Vaimoo and PBSC. Leading micromobility telematics solution players include Comodule, Drover AI, Invers, Luna Systems and Vulog.

Berg Insight estimates that the total shared micromobility fleet worldwide reached approximately 25.3 million vehicles at the end of 2022. Free floating bikes and scooters was the most dominant service in terms of deployed vehicles. Berg Insight forecasts that the bikes and scooters fleet will reach 35.2 million globally by the end of 2027 and the scooters fleet comprising both sit-down and stand-up scooters will then reach approximately 3.0 million vehicles. The regulatory environment will have a considerable impact on the future for this market. Regulators decide the types of vehicles allowed on the road, helmet requirements as well as award operator licenses that limit the number of operators and vehicles allowed.

Commercial micromobility services are offered by specialist bikes and scooters sharing companies, local governments, public transport operators as well as other shared mobility operators. Examples of leading free floating bikes and scooters operators include Meituan Bike, Hellobike and Didi (Qingju). Station-based bikes and scooters operators include Nextbike, Bixi Montreal, Forest, Call a Bike by DB Connect, Docomo Cycle, Hello Cycling, JCDecaux, Mevo and Tembici. Leading sit-down scooters sharing operators include Vogo and Yulu in India; Marti Technologies in Turkey; Cooltra, Cityscoot, Felyx, Emmy and Check in Europe; Revel in North America as well as GoShare and WeMo in Taiwan. Stand-up scooters sharing services was first launched in 2017–2018. The market has grown significantly during the past years and the leading operators in this segment include Tier Mobility, Bolt, Voi Technologies, Lime, Bird, Swing Mobility, Urent and Whoosh. There has been significant M&A activity on this market in recent years, involving diverse players from many parts of the ecosystem. A notable deal in 2023 was Bird's acquisition of Spin from Tier Mobility.

The connected bikes and scooters sharing fleet (World 2022–2027)



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## Glossary

## Highlights from the report

Insights from 30 executive interviews with market leading companies.

New data on bikesharing and scootersharing fleets worldwide.

**Comprehensive overview** of the connected bikesharing and scootersharing value chain.

**In-depth analysis** of market trends and key developments.

**Detailed profiles** of 27 technology vendors and their propositions.

**Case studies** of 50 shared micromobility initiatives.

**Market forecasts** by region lasting until 2027.

## The report answers the following questions

- What is the current status of the shared micromobility industry?
- Which are the leading technology platform providers?
- Which are the leading micromobility telematics service providers?
- How are carmakers and other mobility companies positioning themselves on the market?
- What micromobility services are available from leading service providers today?
- What business models are used by bikesharing and scootersharing operators?
- How will the regulatory developments affect this market in the next years?
- How will the market evolve in Europe, North America and other parts of the world?



## About Berg Insight's IoT market research

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CONNECTED MOBILITY

# The Bike and Scootersharing Telematics Market

What are the latest developments on the bikesharing and scootersharing market? Berg Insight estimates that the number of deployed vehicles in bikesharing schemes will grow at a CAGR of 8.2 percent from 23.7 million at the end of 2022 to 35.2 million by 2027. The number of scooters available from scootersharing services will at the same time grow at a CAGR of 13.4 percent from 1.6 million at the end of 2022 to 3.0 million vehicles in 2027. This report explains all segments including station-based and free floating bikesharing and scootersharing concepts.

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## Who should read this report?

The Bike and Scootersharing Telematics Market is the foremost source of information about the rapid adoption of connected bikesharing and scootersharing technology. Whether you are a bikesharing service provider, scootersharing operator, telematics service provider, car manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

Martin Cederqvist

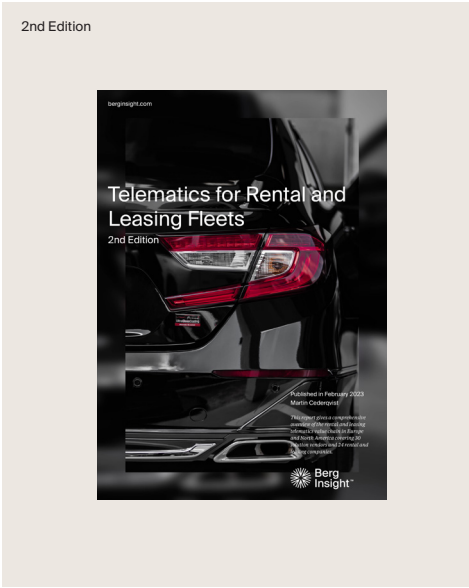


Martin is an IoT analyst covering mainly the automotive sector. He performs strategic analysis of OEM and aftermarket car telematics services, data monetisation services such as insurance telematics and shared mobility, among many other topics. Martin holds a Master's degree in Industrial Engineering and Management from Chalmers University of Technology and joined Berg Insight in 2022.

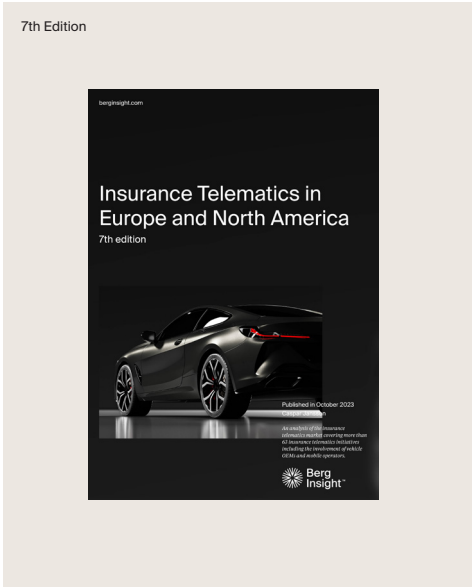
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