The background image shows three white e-scooters parked on a paved surface. The scooters have blue and yellow accents, including helmets hanging from the handlebars. In the background, there are palm trees and a modern white building under a clear blue sky.

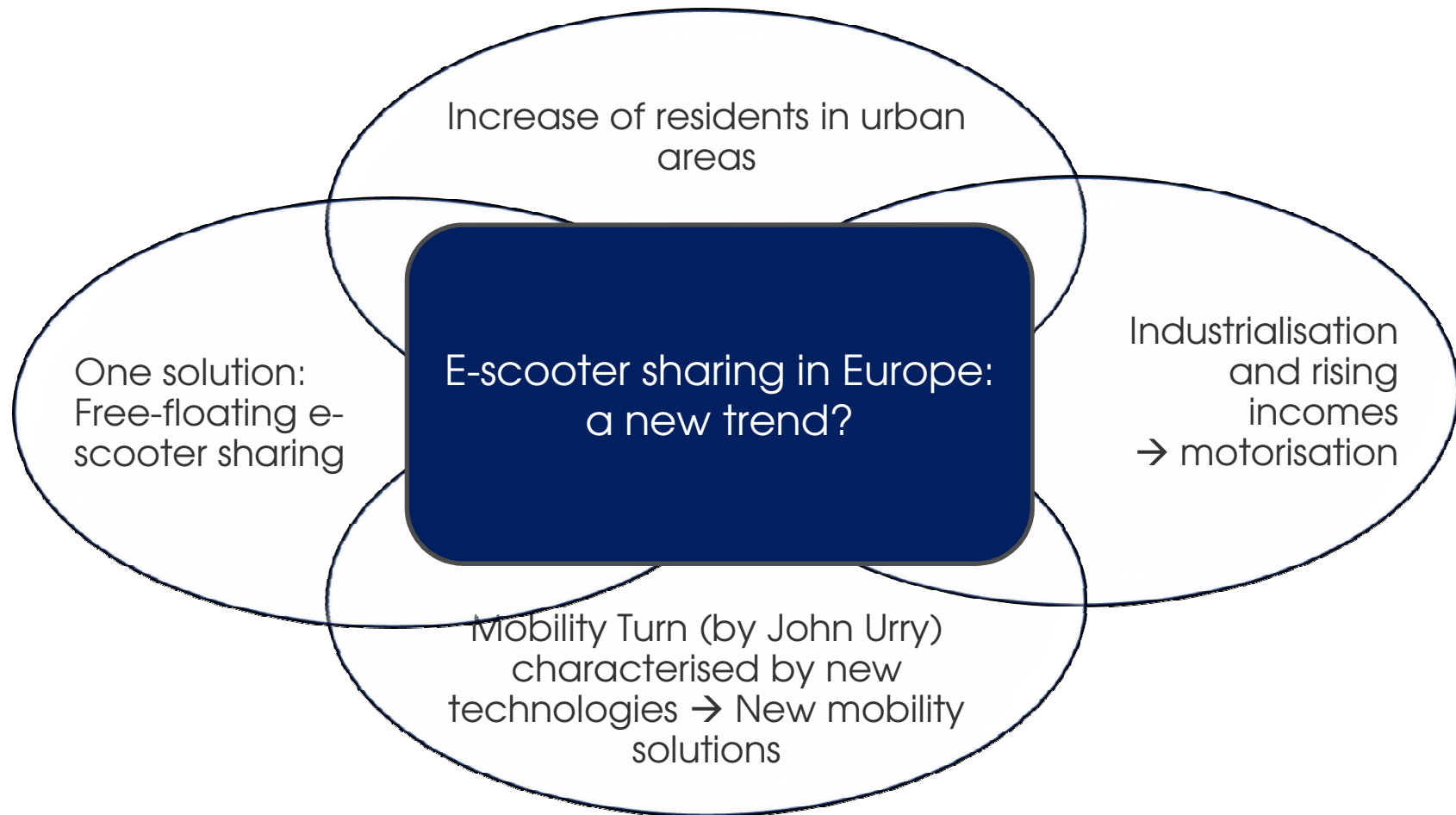
Mobility Transition: E-Scooter sharing in Europe

Julia Münsch | Basic knowledge on Mobility Transition | June 15th


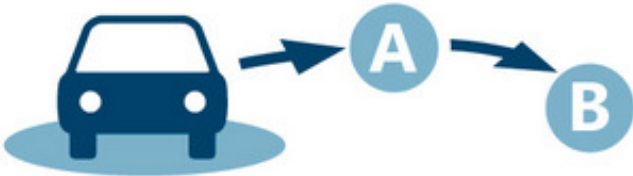
Agenda.

- 1) Research question
- 2) Definition
- 3) E-Scooter – Advantages
- 4) Market overview
- 5) Customer segmentation
- 6) E-scooter sharing & eCooltra
- 7) Conclusion

Research question.



Definition.

| E-scooter | |
|--|--|
|  | Light motorcycle equipped with an electric motor and a battery (lead-acid or lithium) in the L1e or L3e vehicle category |
| Free-floating scooter sharing | |
|  | Service enables one-way journeys in a specified geographic zone |

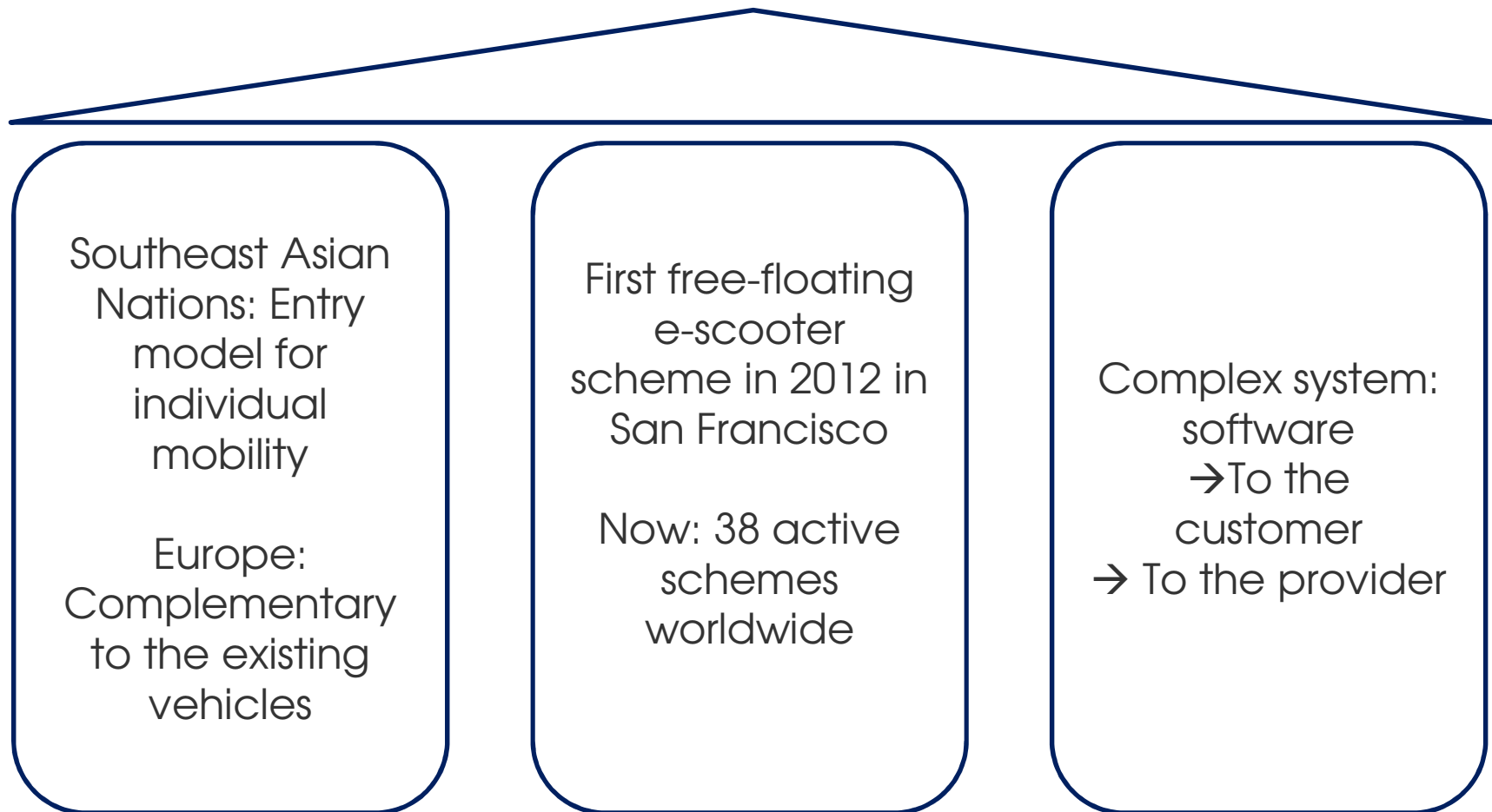
E-Scooter: Advantages.

Transition: Environmental, economic and social performance

Reduced requirement of space

Less air and noise pollution

Market overview.



Customer segmentation.

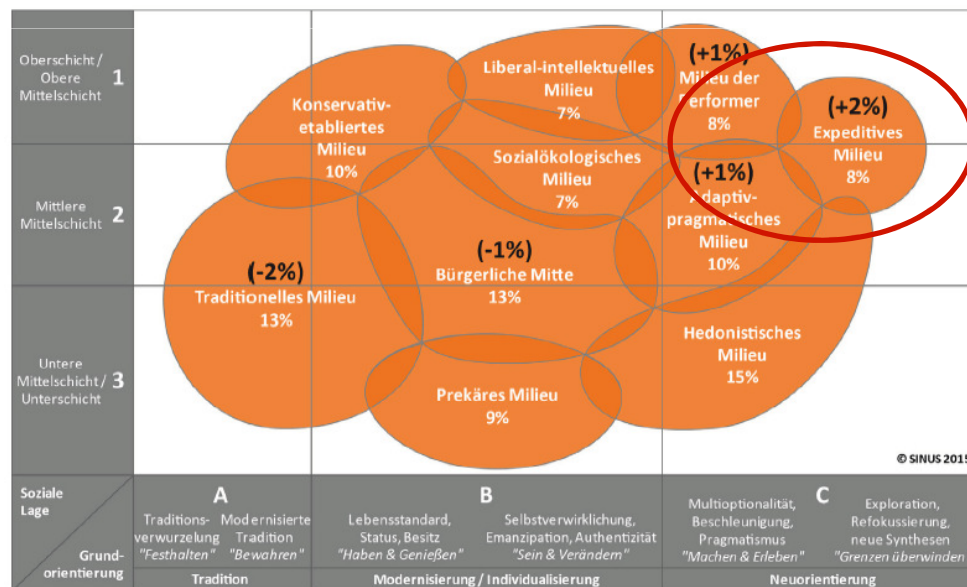
Very mobile

Well-educated

Young

Self-confident

Creative



Urban

Car is no longer a concept of freedom

Future milieu

E-scooter sharing.

Overview.

70% of the whole sharing fleet runs in Europe

Biggest fleets: Paris, Barcelona and Berlin



In total: 8,000 scooters – 92% are electric scooters

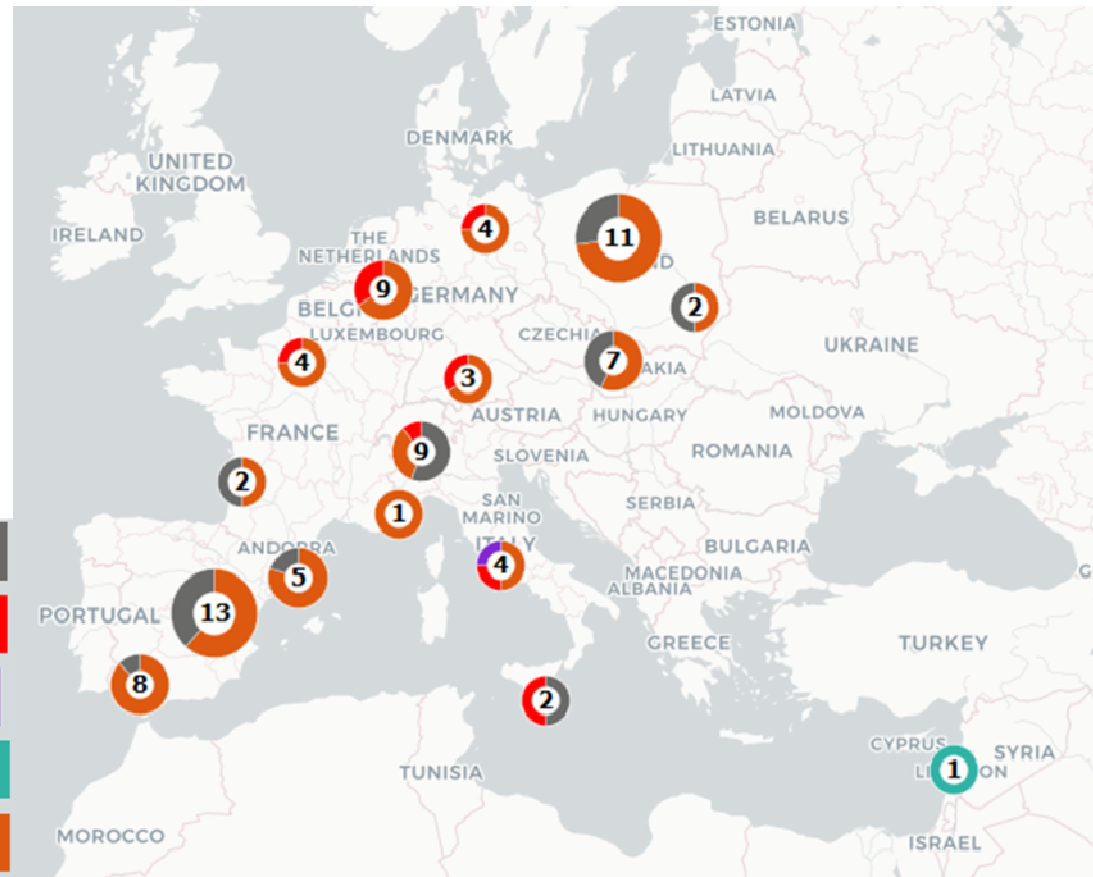
Low maintenance costs, low operating costs, handling

E-scooter sharing.

A new trend?

Legend:

| | |
|---|---|
|  | Inactive (Proposed System) |
|  | Inactive (Past/Closed System) |
|  | Miscellaneous (no classic scootersharing) |
|  | Active (Stationary) |
|  | Active (Free Floating) |



eCooltra – Barcelona.



Subsidiary of Cooltra renting



Found in 2015



Biggest fleet in Europe – 3,000 scooters



Barcelona, Madrid, Rome, Lisbon, Milan



Expert interview.

Active users:
education

Support from
the
municipalities
(infrastructure)

Fleet: 3,000
vehicles

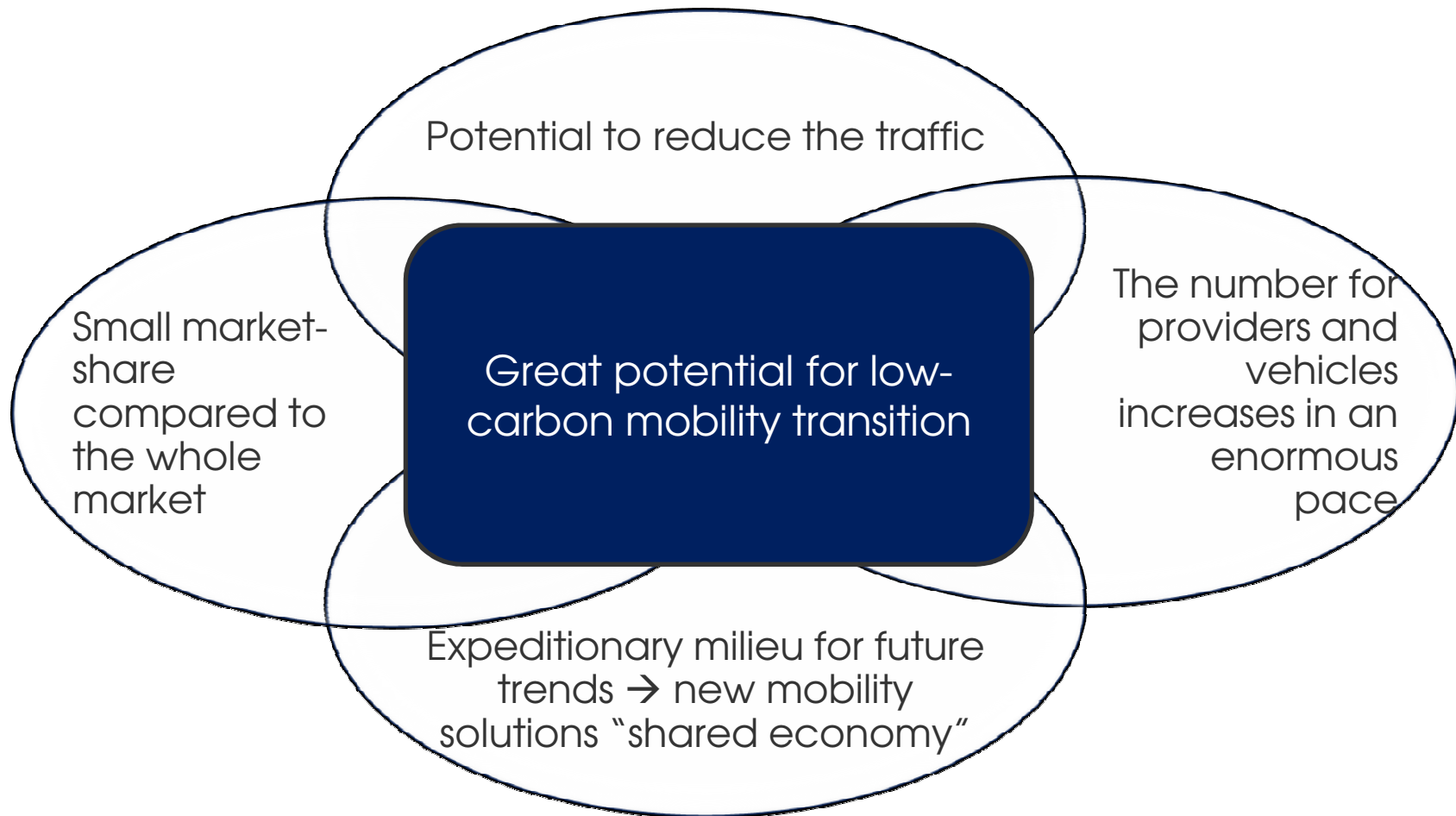
Different
framework
conditions

City solution

Subsidies vs.
Limitations –
long term
company
success

Early tech
adopters (25 to
35)

Conclusion.



Thank you
for your attention.