

MICRO- MOBILITY EXPLORER

SUMMARY

—
SHARING MOBILITY CONFERENCE
JUNE 27, 2019 • ROME

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Your next personal car



LEARNING EXPEDITION

INTERVIEWS

SAN FRANCISCO

SCOOT / UBER / JUMP
Remix / SFMTA

LOS ANGELES

LA Metro
UCLA

SANTA MONICA

Santa Monica Spoke

PARIS

DOTT
Vraiment Vraiment

NANTES

SEMITAN
SCE

ANGERS

Pony Bikes

Finding the next silver bullet

An illustration of a large, round, light-colored table surrounded by several stylized human figures in various colors (blue, orange, red, grey) sitting at the table. The table is covered with various business and technology icons, including laptops, charts, graphs, a smartphone, a magnifying glass, and a lightbulb. The background is a solid yellow color.

LOW CARBON

LOW COST

EASY TO USE

SAFE

EFFICIENT FOR 60% OF TRIPS (the shortest)

« Everything old is new again »



1916



2017

171
文庙路

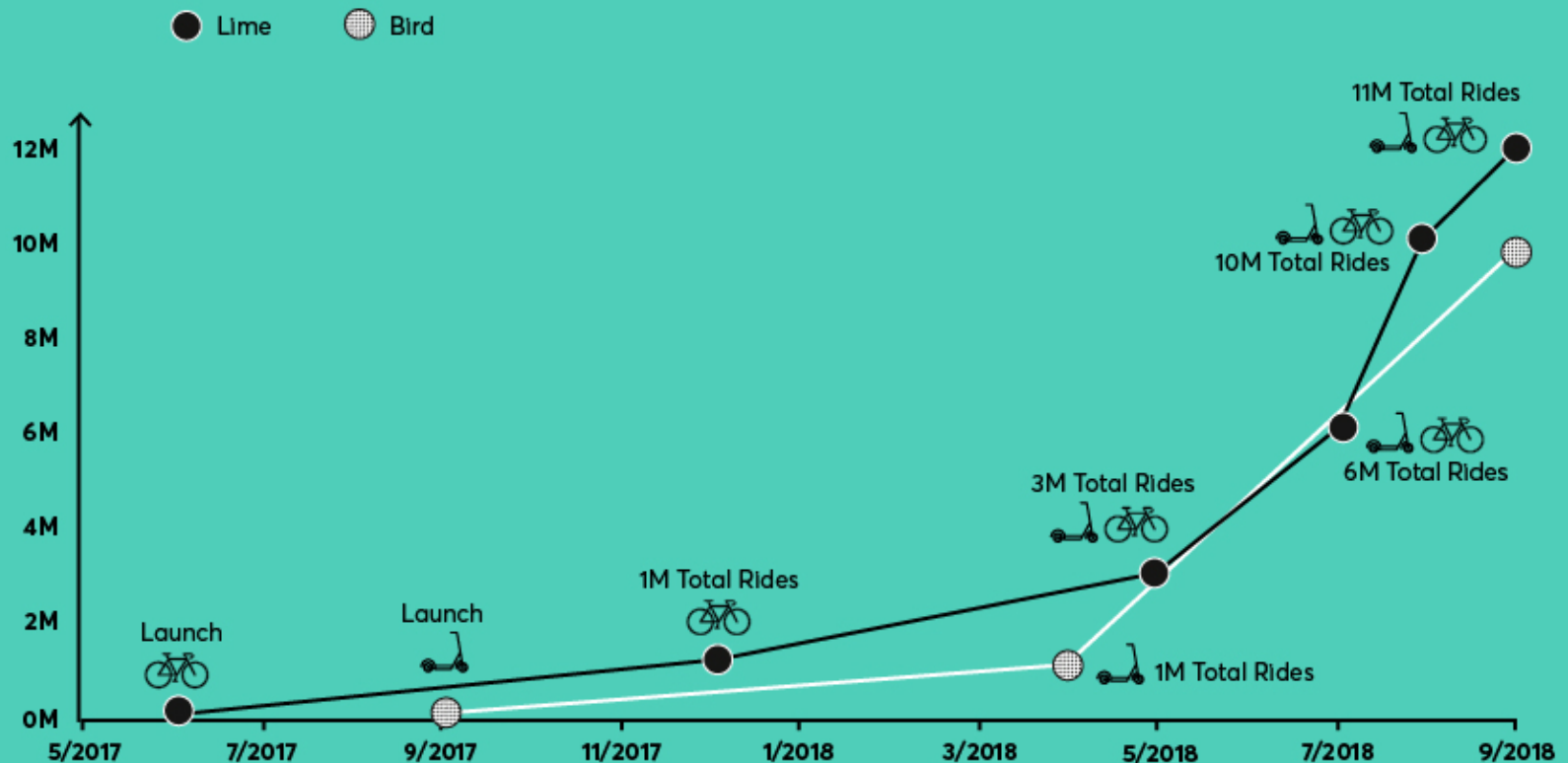


No matter what the form factor is



« We've never seen such a growth before »

CHARTING THE GROWTH OF BIRD & LIME'S TOTAL RIDE COUNTS, BASED ON COMPANY REPORTS



Paris is the first market for free floating companies

- 66% men (motorbike : 92%)
- 42% tourists or visitors
- 69% « because it's fun ! »
- 68% « because it's fast ! »
- 8% only used car instead



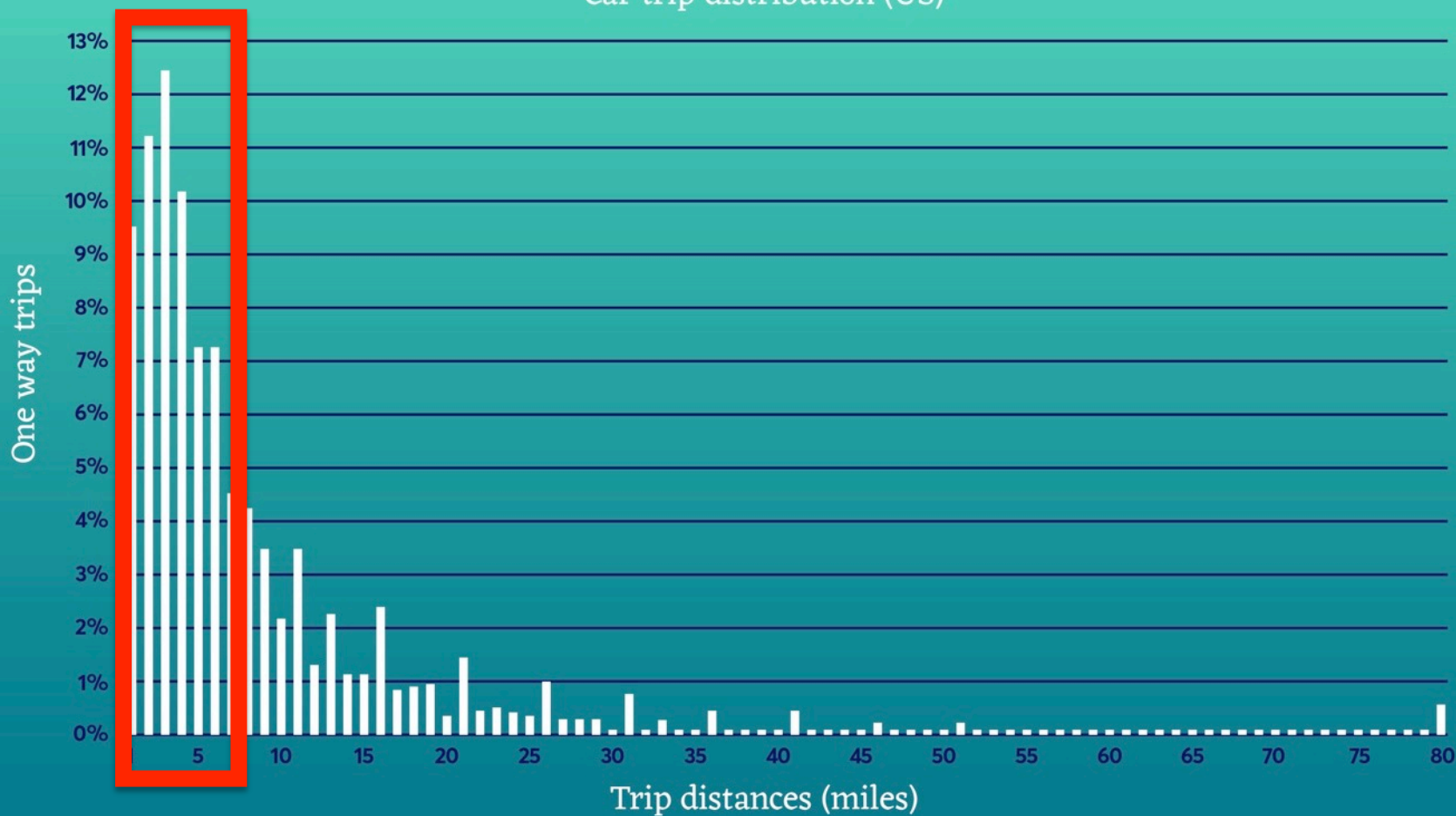
Paris, Lyon and Marseille, 4300 users, 2019



How big is the market ?

30 à 50% of the market

Car trip distribution (US)



DISRUPTING THE CAR

Alternatives to car ownership by trip length

Micromobility

0-5 miles



BIKES & SCOOTERS



60% of trips in the US

Medium distance

5-15 miles



RIDE HAILING



25% of trips in the US

Long distance

15+ miles



CAR SHARING

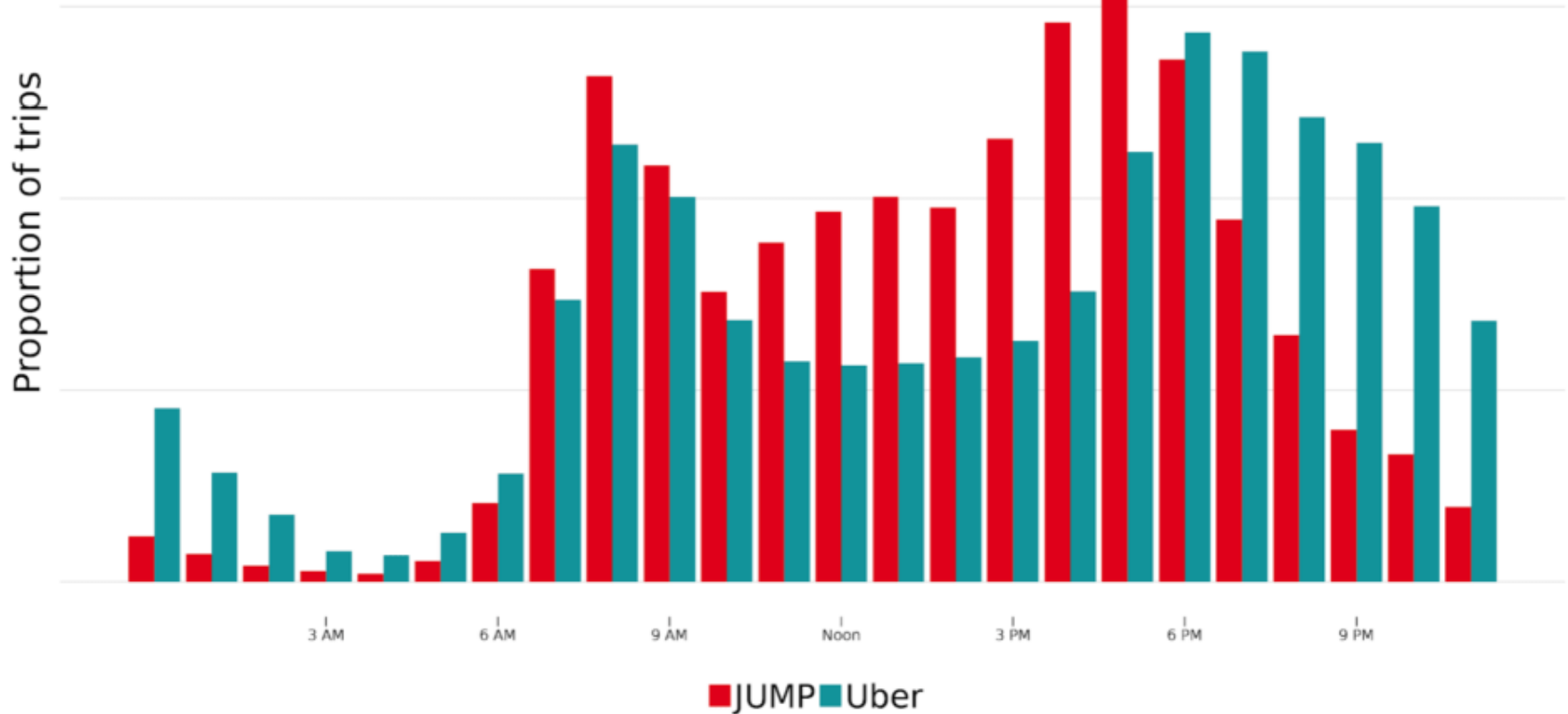


15% of trips in the US

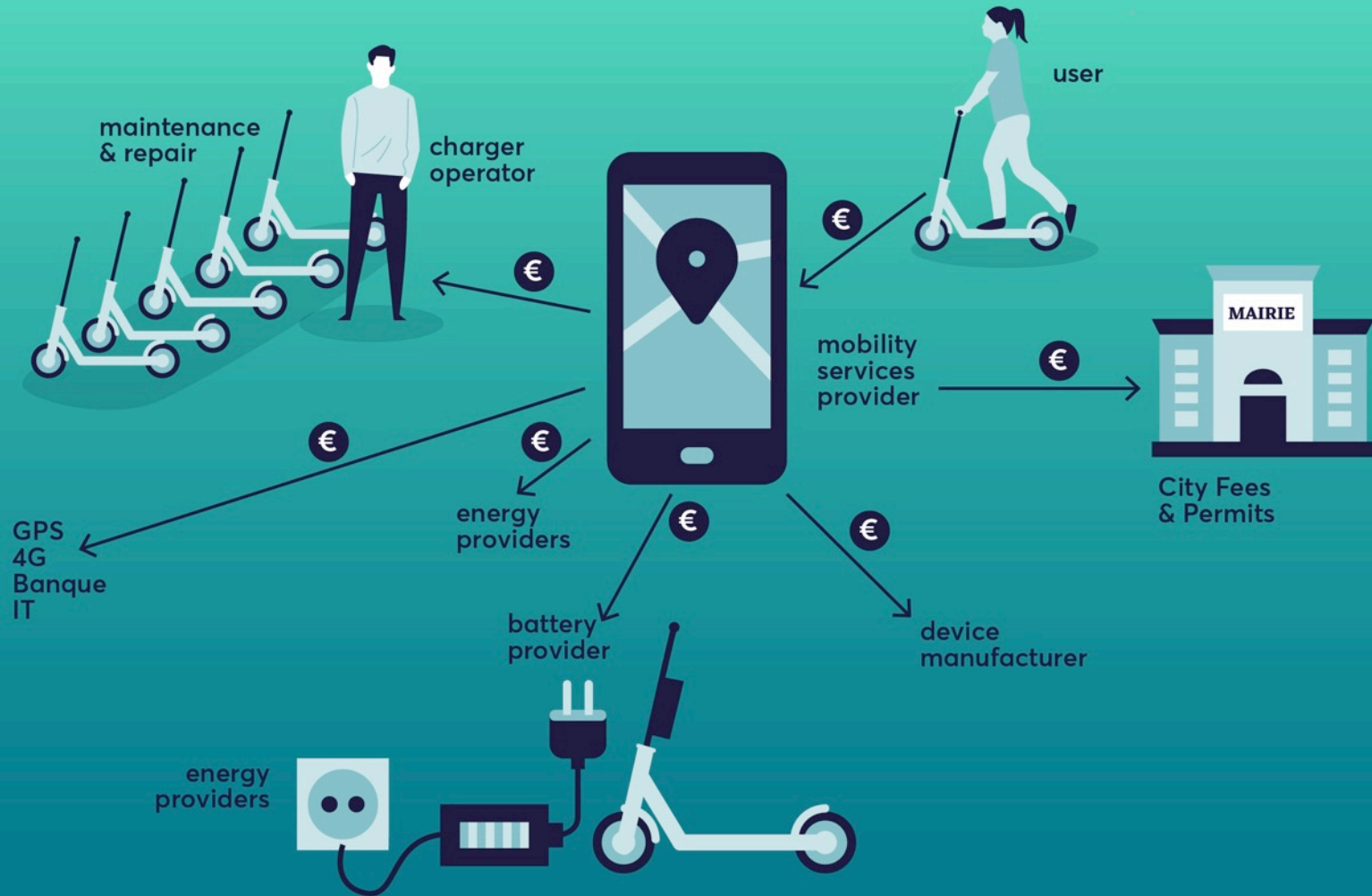
Capital fuels micromobility growth

nom (pays)	engin	fonds levés	nb de tours
OFO (CN)		2 150	
MOBIKE (CN)		928	
LIME (US)	 	765	
GOGORO (TN)		480	
BIRD (US)		415	
BOLD TXFY (EE)	 	177	
SKIP (US)		131	
VOI (SE)		83	
GRIN (MX)		72	
FLASH (DE)		62	
TIER (DE)		62	
DOTT (FR)		23	

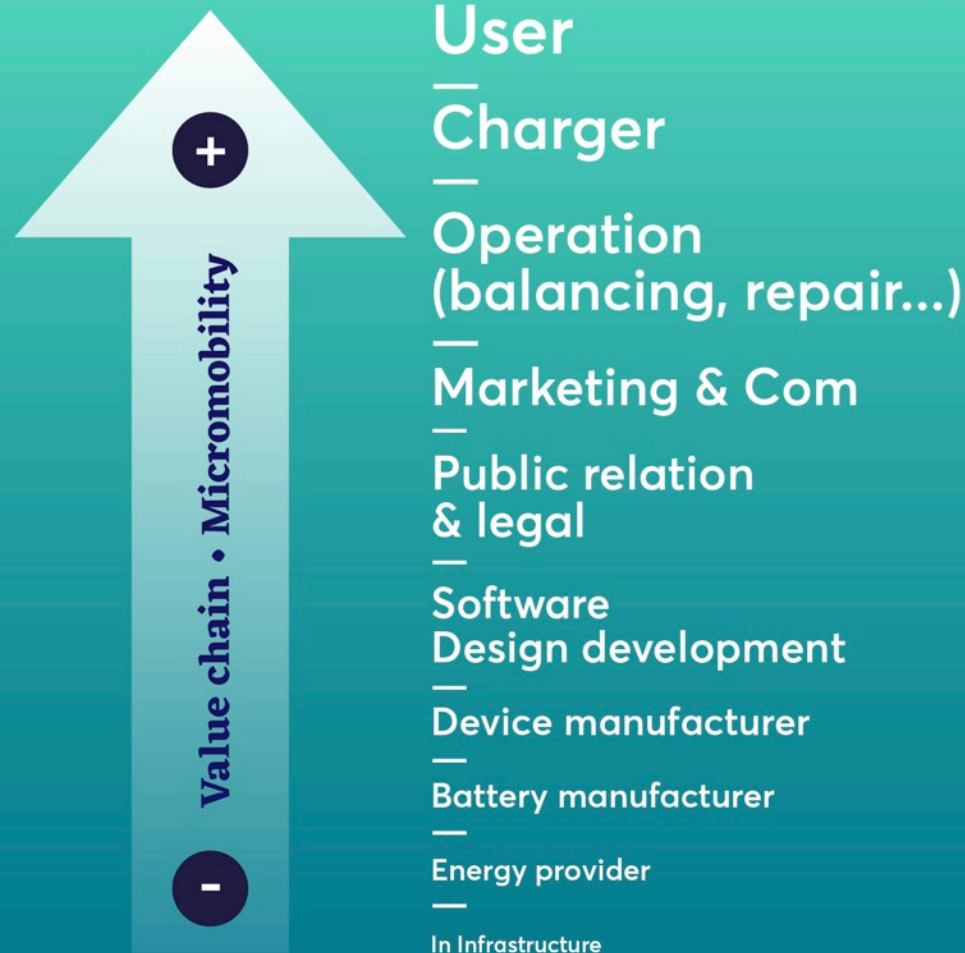
Uber is uberized



Micromobility : the value chain



Micromobility : the value chain



Sharing the public space



Photo : James Gross



Using technology to solve problems

Scooter Speed Zones

Beginning March 26th, Bird, Jump, Lime, and Lyft will use geofencing to implement a maximum acceleration of 8 mph on their scooters in defined areas of campus

Safety Tips

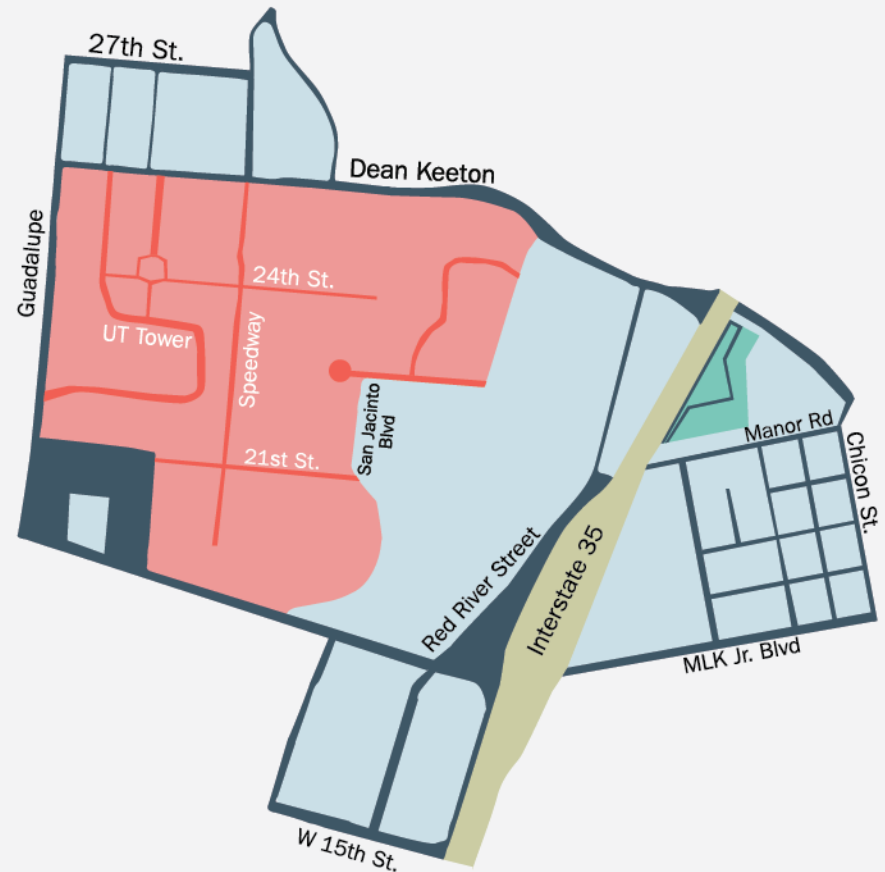


Wear a helmet and follow other safety guidance





Operate at a low speed in the presence of pedestrians

Ride scooters only where bicycle traffic is allowed

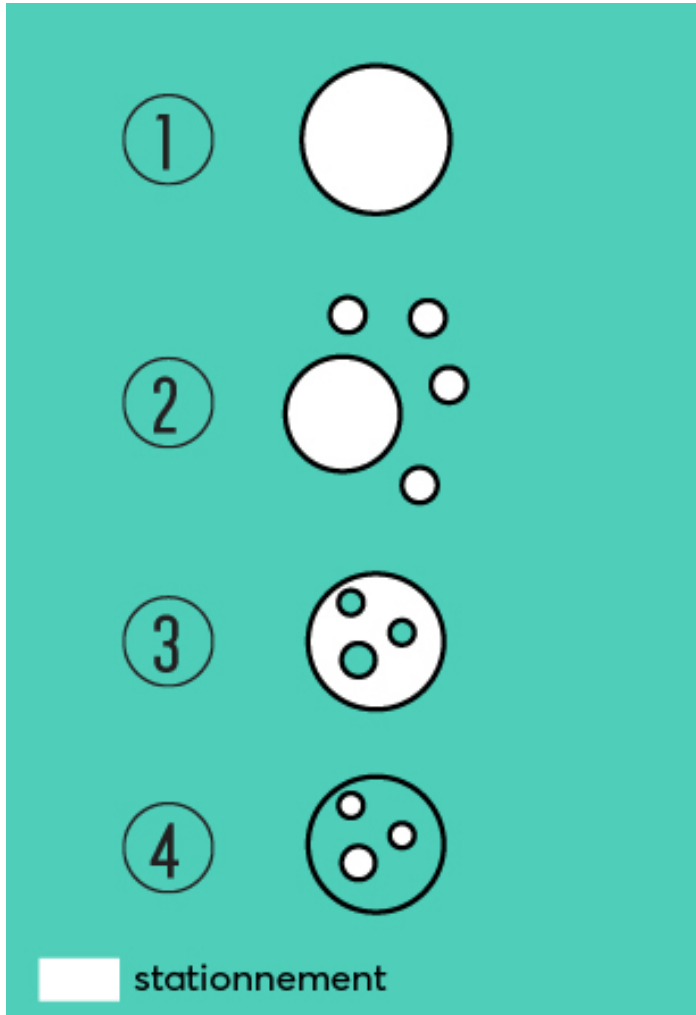
SOURCE: [HTTPS://PARKING.UTEXAS.EDU/SCOOTER](https://parking.utexas.edu/scooter)



KEY

-  City of Austin - 15 mph
-  UT Campus - 15 mph
-  Under review - proposed 8 mph
-  Inner Campus - 8 mph

Sharing public space



New business models



Start your fleet

Bird Platform invites independent operators from around the globe to start their own fleet of e-scooters. Sign up to join the waitlist.

By clicking 'Join the waitlist', you agree to Bird's Terms of Service and Privacy Policy.

[JOIN THE WAITLIST](#)



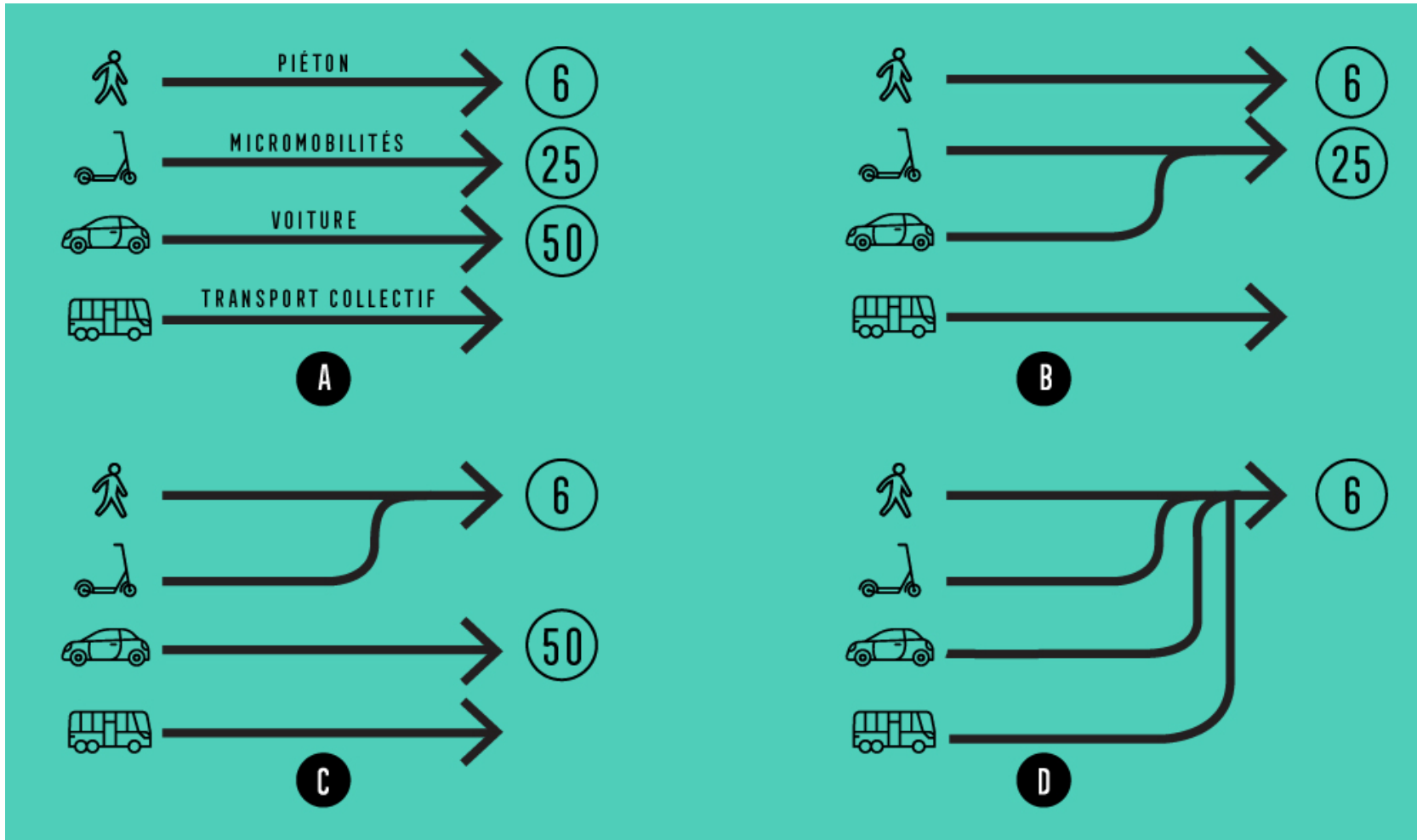
New business models



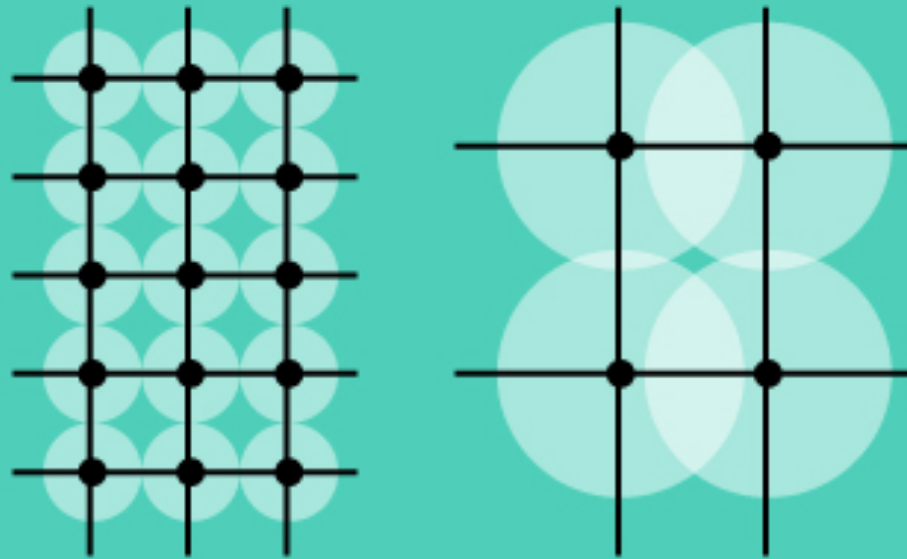
Building the next infrastructure



Street design



Connect different systems





CITY

GOALS

Safety for all . develop clean and accessible transportation . low carbon . integration with existing public transportation network . public space use optimization . externalities financing . healthy competition between providers



MOBILITY PROVIDER

GOALS

Right to operate. sell more trips. improve UX. Reduce device degradations. control operational and support costs

USE OF PUBLIC SPACE

PUBLIC TENDER, SELECTION



CONTRACT

EDIT, SIGN

SIGN

GENERAL RULES

Operation permit. Insurance. Contract period. Updates and reviews. Term conditions.

NEW URBAN FACILITIES

SS

SS

FEES AND FINES

per device (year, month, day) ?
per trip ? depending on location ?

FLEET MANAGEMENT,
PARKING, CIRCULATION

DATA

SAFETY, SUPPORT
AND SOCIAL IMPACT

REVIEWS / BREACH ?

REPORTING

