CoMoUK Annual Shared Micromobility Report UK

2024

CoMoUK
supporting shared transport

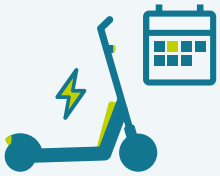
Contents

Key findings 2024

SHARED MICROMOBILITY SERVES USERS' DAY-TO-DAY TRAVEL NEEDS

62%

of active users use bike share at least once a week

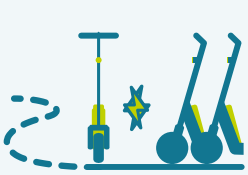


45%

of active users use shared e-scooters at least once a week

52%

of active users said that their most common reason for a bike share trip in the last 12 months was to travel to work or school



48%

of active users said that their most common reason for a shared e-scooter trip in the last 12 months was to travel to work or school

SHARED MICROMOBILITY INCENTIVISES ACTIVE TRAVEL

69%

of active users of shared bikes and/or e-scooters cycle more often or much more often since starting to use shared micromobility; this includes 27% of exclusive shared e-scooters users who now cycle more or much more often

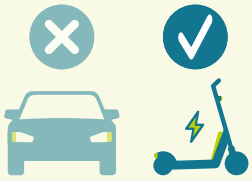
25%

of active users of shared bikes and/or e-scooters walk more often or much more often since starting to use shared micromobility

SHARED MICROMOBILITY HELPS REDUCE CAR TRAFFIC

16%

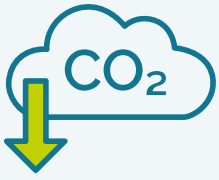
of all bike share trips by active users replace trips that would otherwise have been made by car



21%

of all shared e-scooter trips by active users replace trips that would otherwise have been made by car

SHARED MICROMOBILITY MAKES TRIPS FASTER AND GREENER



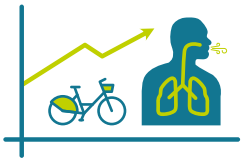
61.7 kg

CO_2e are reduced, on average, by every active shared micromobility user per year, thanks to car miles that are replaced by shared bikes and e-scooters

84%

of users say that bike share makes their trip quicker

SHARED MICROMOBILITY PROVIDES USERS WITH HEALTH BENEFITS



56%

of bike share users confirm that bike share provides them with exercise

26%

of shared e-scooter users say that shared e-scooter usage provides them with mental health benefits

Introduction

Welcome to the UK's first ever Shared Micromobility Report. This report paints a picture of continuing growth in a sector that has expanded rapidly in the UK and globally. Here we analyse data from UK users and operators as we have since 2016. But for the first time, we are looking at bike share and e-scooter share.

This ground-breaking dive into shared micromobility, illustrates the many important inter-relationships of shared bikes, e-bikes and e-scooters with public transport, active travel and private car use. We look at who is using shared micromobility schemes, how often, and why. We examine users' satisfaction with these services and the impacts they have on the people using them. We present individual human stories of shared micromobility users in this country as user quotes throughout this report.

We find that there are very substantial direct and indirect benefits of using shared micromobility such as improving users' health, boosting the use of other sustainable transport modes, reducing private car use and, more emotively, bringing people pleasure and freedom.

At a national scale, these individual benefits can have significant aggregate effects. We find, for example, that 61.7kg of CO_2e are reduced, on average, by every active shared micromobility user per year, thanks to car miles that are replaced by shared bikes and e-scooters. With continued growth, the reduction in car miles which the sector delivers could add up to a 1% cut in the UK's traffic-related greenhouse gas emissions.[1]

To achieve this growth, policies that support the sustained development of shared micromobility are needed. The required policy shifts are detailed in the conclusion at the end of this report. Before that, we provide some background on the sector's history; describe our methodology; present users' demographic data; investigate the relationship between shared micromobility use and behaviour change; examine the individual and collective benefits of shared micromobility use; look at the relationship between it and public transport use and report on users' satisfaction levels.

Dott

We hope you take insight and inspiration from this work. We are delighted to get questions and enquiries at info@como.org.uk.

1 The Full Potential of Shared Transport in England and Wales

Background

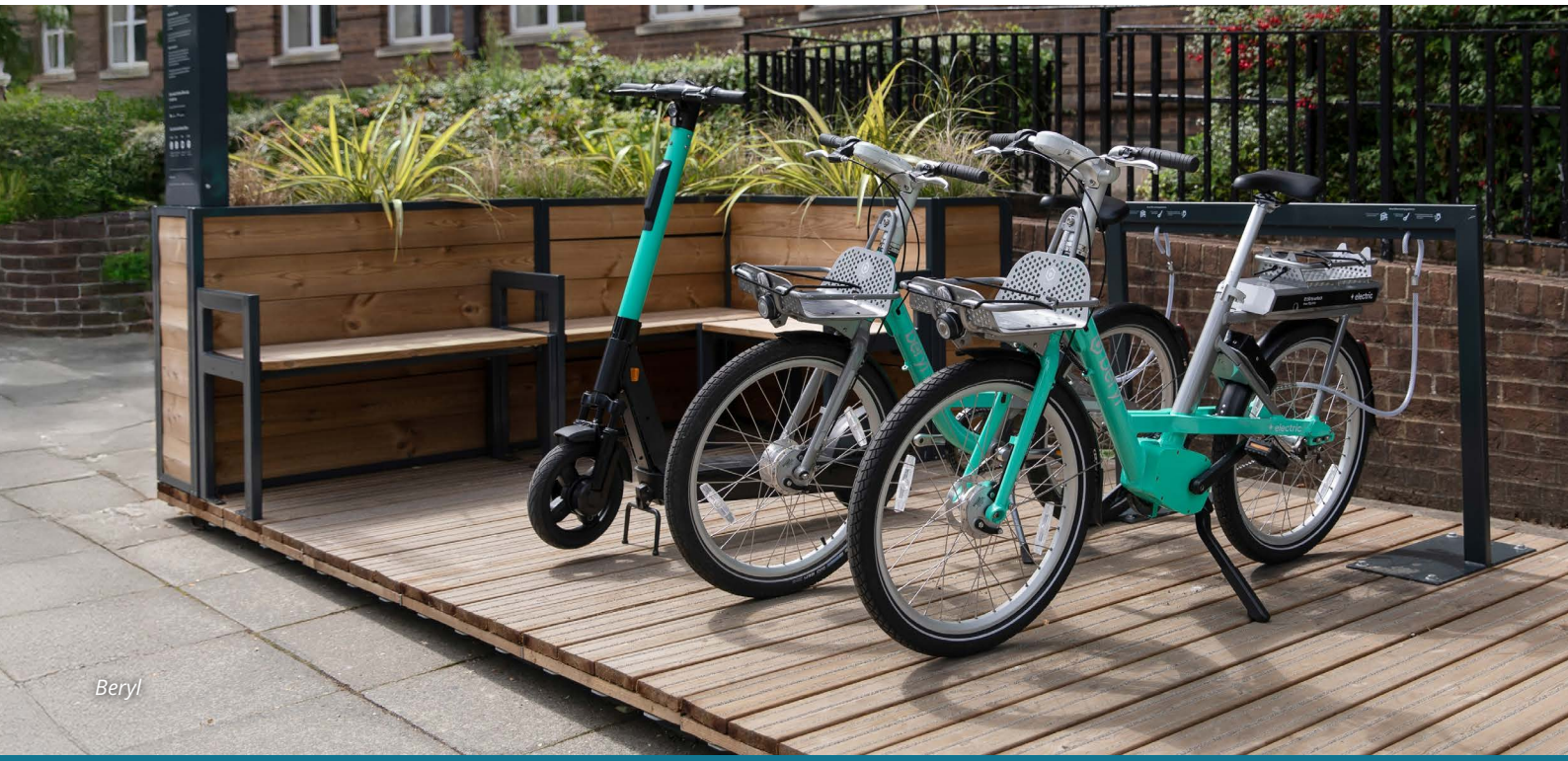
This report builds on CoMoUK's unrivalled expertise in the UK's shared transport sector. The report continues our annual series of UK bike share reports that we have been producing since 2016, and expands our research in this field by integrating latest findings from shared e-scooter trials in England. The term *shared micromobility* has become increasingly popular to designate both shared bikes and shared e-scooters since 2020, and will be used as an umbrella term to designate these two shared modes throughout this report.

Bike share schemes in the UK have seen a spectacular increase in the last decade. In 2024, we recorded 2.8 million active bike share users.[1] This represents a growth of 5% compared to 2023 and more than a quadrupling of active user numbers from 2019, when we recorded just over 600,000 active users.

Shared e-scooters were introduced to the UK only in 2020 as part of a number of trial schemes in selected local authorities in England. The introduction of a trial scheme has to be approved by the Department for Transport. Outside of these trial schemes, the use of e-sooters on the public highway is currently illegal. Although this regulatory framework has constrained the growth of shared e-scooters, since their inception, the trial schemes have attracted over 3.5 million users and generated close to 53 million trips across England. In 2024 alone, shared e-scooters were used by 950,000 active users who made 13.6 million trips between October 2023 and September 2024.

The continued growth in user and trip numbers is accompanied by an increasing electrification of shared micromobility. The share of e-bikes in the UK's bike share fleet amounted to 70% in September 2024, up from only 55% in 2023 and 36% in 2022. This trend helps overcome hurdles for users who might not have cycled or used a scooter otherwise.

1 Number of active users between 1 October 2023 and 30 September 2024



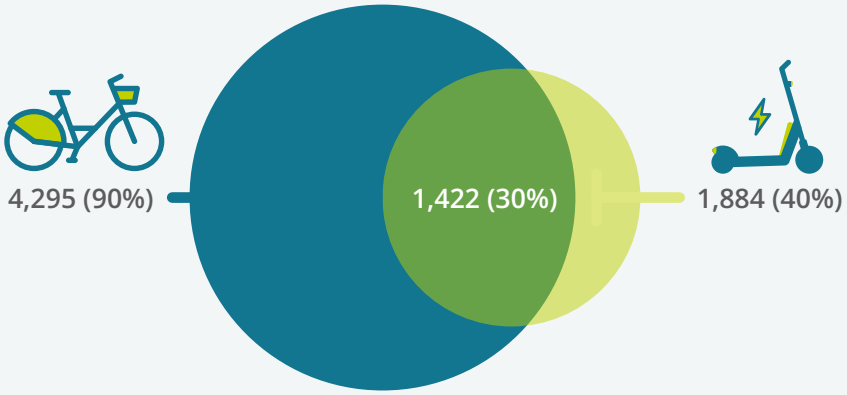
Beryl

Methodology

The data for this report was collected in two ways. Firstly, we conducted an online survey with shared micromobility users between 16 September and 28 October 2024. The survey was distributed to users by CoMoUK-accredited micromobility operators[1] and selected local partners via email and in-app notifications. As an incentive to complete the survey, respondents could win one out of five £50 shopping vouchers. Additionally, some operators provided discounts for users of their schemes when they completed the survey.

Overall, the survey received 4,917 valid responses. Among these were 4,757 active shared micromobility users; this means that these respondents used a shared bike and/or a shared e-scooter in the 12 months before completing the survey. This report will only focus on the 4,757 active shared micromobility users. Among the active shared micromobility users who completed our survey, 4,295 (90% of all active users) had used a shared bike in the 12 months before completing the survey and 1,884 (40%) had used a shared e-scooter. 1,422 (30%) active users in our sample had used both shared bikes and e-scooters in the last 12 months. Respondents who said that they did not know how often they had used a shared bike or e-scooter were excluded from the respective sample. The distribution of all active shared micromobility users in our sample across modes is shown in the figure below.

Distribution of active shared micromobility users across modes (n = 4,757; 100%)



The second data source for this report is metrics data that shared micromobility operators provided to CoMoUK. This includes user numbers, fleet details and details on micromobility trips. This data reflects the state of shared micromobility on 30 September 2024. When referring to data provided by operators, this is made explicit throughout this report

The percentages presented in this report are all rounded to the nearest integer. Hence the sum of percentages in some statistics might not amount to 100. Blank responses have been discounted before calculating percentages, either because people chose not to answer, or because they were excluded from certain sections. For example, respondents who said they had not used bike share in the previous 12 months skipped the subsequent questions on bike share.

1 Tier, Dott, Nextbike, Beryl, Lime, Serco, Voi and Forest.

Demographics of survey respondents

The demographic data of our survey respondents, to a large degree, resembles those of shared micromobility users overall. Hence, we assume that our sample of users is broadly representative of the overall population of shared micromobility users.[1]

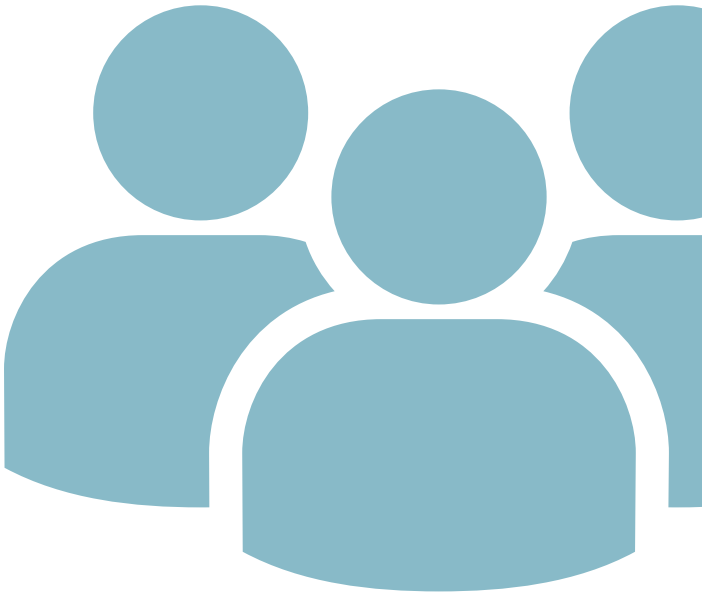


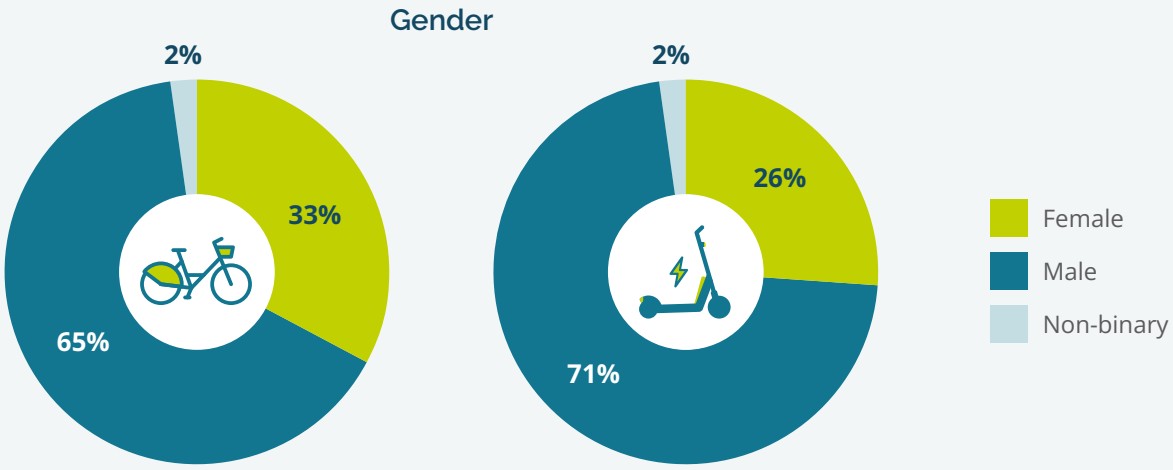
Image: West Midlands Cycle Hire (Serco)

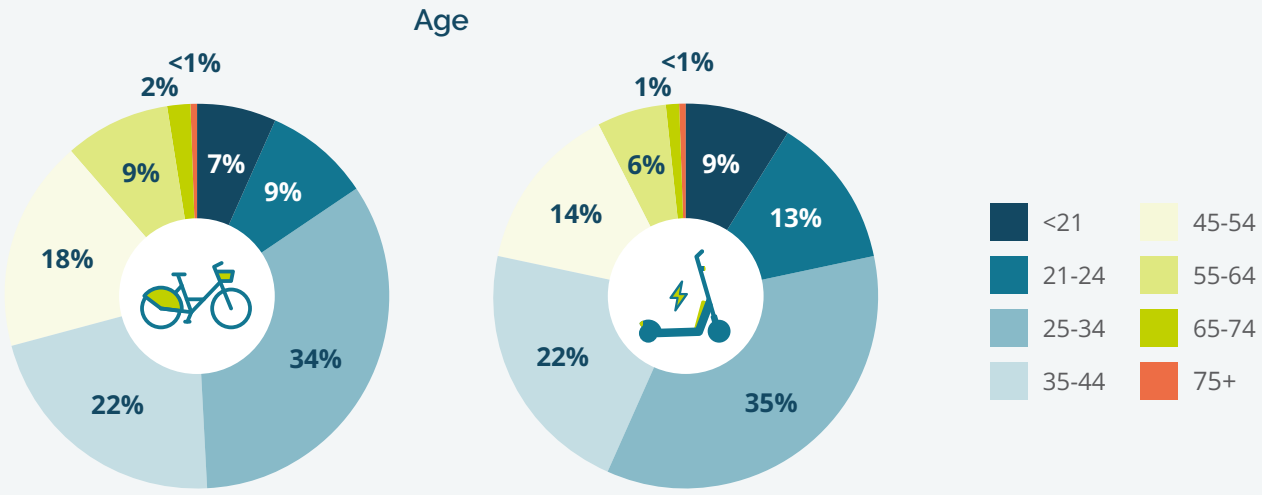
1 While surveys run exclusively online such as ours can create a selection bias, we assume that this does not limit the representativeness of this work. This is because shared micromobility use requires a degree of digital literacy to access shared micromobility vehicles through smartphone apps.

Age and gender

The distribution of age and gender show similar patterns for bike share and shared e-scooter users. The largest share of users of both modes are male and under 35 years old. This pattern is more pronounced among shared e-scooter users. 71% of all active shared e-scooter users identify as male, compared to 65% of all active bike share users. Similarly, 57% of shared e-scooter users are under 35, compared to 49% of bike share users.

The gender gap in the uptake of cycling can also be observed beyond shared bikes. While men in England, on average, made 22 cycle trips in 2023, women only made 9. At the same time, the average number of annual cycle trips were almost evenly distributed across age groups for people aged 17 to 69.[1]





1 NTS0601a: Average number of trips by sex, age and main mode.

Regional distribution

Shared micromobility can be successful in towns and cities of various sizes. However, shared micromobility schemes typically need a critical mass of potential users to operate successfully. As a result, 67% of the respondents to our survey said that they used shared micromobility most often in London, with the remainder of respondents being located across a large range of other locations. The table below show the 10 locations where our survey received the most responses.

Despite the large share of survey responses received from London users, London is still underrepresented in our survey sample. Based on operator data, 80% of shared micromobility users primarily use London-based schemes.

Locations	Responses	
London	67%	3,189
Bristol	8%	391
Norwich	3%	155
Brighton & Hove	3%	138
Greater Manchester	2%	112
Essex	2%	84
Bournemouth	2%	75
Milton Keynes	1%	60
Plymouth	1%	56
Colchester	1%	46
Other/none of the above	1%	48

nextbike by Tier)

Income

Shared micromobility users can be found across all income bands. However, shared e-scooters attract a larger share of users in lower income bands than bike share. The benefits of shared e-scooter use for low income users are further discussed in the section "Boosting efficiency of transport systems" in this report.

Among active bike share users, 10% receive a gross personal income of less than £10,000 per annum; 8% receive £10,001 to £20,000; 14%, £20,001 to £30,000; 16% £30,001 to £40,000; and 12% £40,001 to £50,000. 40% of active bike share users have a gross annual income of £50,001 or more.

Among active shared e-scooter users, 13% receive a gross personal income of less than £10,000 per annum; 11% receive £10,001 to £20,000; 18%, £20,001 to £30,000; 16% £30,001 to £40,000; and 11% £40,001 to £50,000. 30% of active bike share users have a gross annual income of £50,001 or more.

The median gross annual earnings for full-time employees in the UK were £37,430 in April 2024.[1]

Gross personal income p.a.

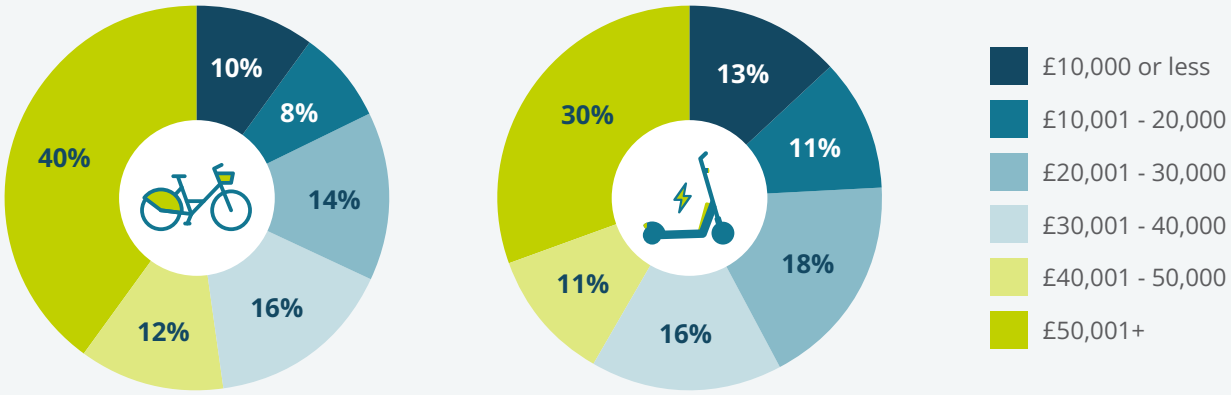


Image: Voi

1 Employee earnings in the UK: 2024

Ethnicity

The ethnic composition of our survey sample shows that shared micromobility users come from all ethnic backgrounds. Among bike share users, 77% identify as white, 8% as Asian or Asian British, 6% as mixed or multiple ethnic groups, 5% as Black, Black British, Caribbean or African, and 4% as another ethnic group. Among e-scooter users, 75% identify as white, 9% as Asian or Asian British, 6% as Black, Black British, Caribbean or African, 6% as mixed or multiple ethnic groups, and 4% as another ethnic group.

According to the 2021 Census, among the population of England and Wales, 82% identified as white, 9% as Asian, Asian British or Asian Welsh, 4% as Black, Black British, Black Welsh, Caribbean or African, 3% as mixed or multiple ethnic groups and 2% as other ethnic group.[1]

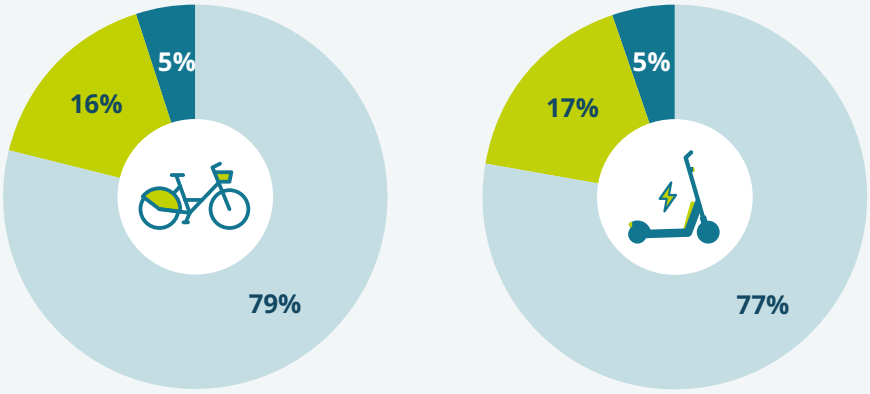
Image: OVO Bikes, Glasgow (nextbike)

1 Ethnic group, England and Wales - Office for National Statistics

Disability

Shared micromobility is also used by individuals with disabilities. Among active bike share users, 5% of respondents say that they have health conditions lasting or expected to last more than 12 months that reduces their ability to carry out day-to-day activities. 16% say that they have a lasting health condition that does not reduce their ability to carry out day-to-day activities. 79% of respondents stated that they did not have a lasting health condition. Among active shared e-scooter users, 5% have a health conditions that reduces their ability to carry out day-to-day activities, 17% have health conditions that do not reduce their ability to carry out day-to-day activities, and 77% say that they have no health condition. Our entire sample of active shared micromobility users includes 220 users (5%) with a disability. Among the overall population of England and Wales, 18% had a disability according to the 2021 Census.[1]

Respondents with health conditions lasting or expected to last more than 12 months



- None
- Condition that does not reduce ability to carry out day-to-day activities
- Condition that does reduce ability to carry out day-to-day activities

Image: Forest, London

1 Disability, England and Wales: Census 2021

Shared micromobility use: frequency and trip purpose

For many users, shared micromobility is a “normal” mode of transport that they use on a regular basis to get from A to B. 62% of active bike share users and 45% of active shared e-scooter users use the respective services at least once per week. Around half of the users of each shared micromobility mode stated that their most common reason for a shared micromobility trip was to go to work or school. These patterns of user behaviour show that shared micromobility has become an integral part of transport systems throughout the UK.

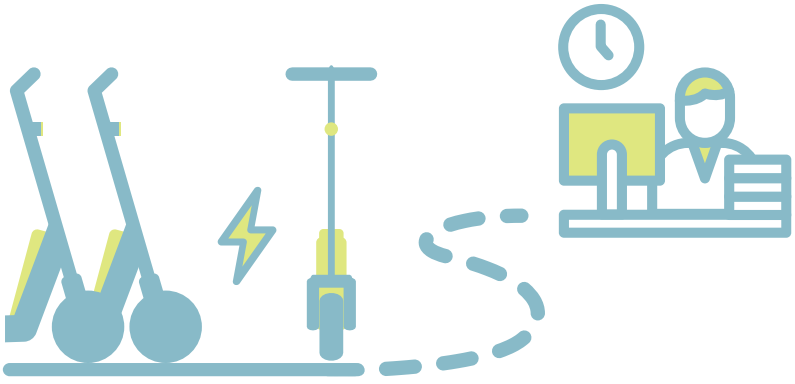


Image: Beryl

Use frequency

For the vast majority of active users, shared micromobility is a regular mode of transport. 92% of active bike share users use shared bikes at least once a month. Among those are 62% who use bike share at least once per week, and 31% who even use it 3 times per week or more. Only 8% say that they have used bike share less than once per month but at least once in the 12 months before completing the survey. Less frequent users were not classified as active users, and were excluded from the analysis.

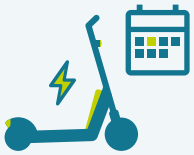
Among active shared e-scooter users, 71% stated that they use shared e-scooters at least once a month. This includes 45% of users who use shared e-scooters at least once per week, and 26% of users who use them 3 times per week or more. 29% of active e-scooter users said that they used shared e-scooters less frequently than once a month but at least once in the 12 months before completing the survey. Less frequent users were, again, excluded from the analysis.

"I absolutely love it. I've used the bikes at least 3 times a day, pretty much every day since starting to use them about a month ago. It takes 10 minutes to get to work from London Bridge now, and I never miss my train on the way home because I can cycle so quickly and I don't get caught up in traffic. I feel much healthier, I'm getting lots more exercise, and I don't have to worry about theft."

Female user from London, 25-34

62%

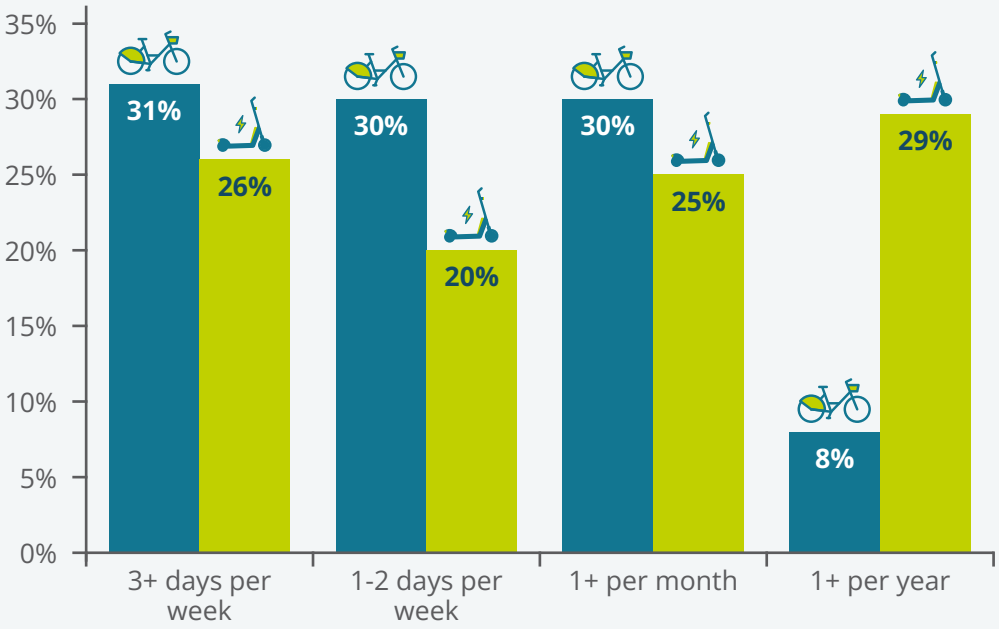
of active users use bike share at least once a week



45%

of active users use shared e-scooters at least once a week

Use frequency by active users of each shared micromobility mode



"I use them to take my son to school, he loves it that I can ride with him as he uses a scooter or bike to get to school and it makes our mornings and afternoons so much fun. School runs are less hassle now and he can't wait to get up and go to school every day now."

Female user from Milton Keynes, 35-44

Trip purpose

Shared micromobility, for most users, is a means to carry out key functional trips. Bike sharers, and, separately e-scooter users, were asked about the most common reason for using the mode in the last 12 months. Around half of active users said that their most common reason for a shared micromobility trip in the last 12 months was to travel to work or school. This was true for 52% of bike share users and for 48% of shared e-scooter users. A substantially smaller share, 10% of bike share users and 16% of shared e-scooter users, answered that their most common reason for a shared micromobility trip was to get exercise or pleasure from the ride. Around 1 in 8 users said that their most common reason for hiring a shared bike (12%) or e-scooter (14%) was other leisure trips, e.g. going to the cinema or theatre. About one tenth of users (11% bike share; 10% shared e-scooters) stated that their most common trip purpose was essential trips other than work or school such as shopping, attending doctor's appointments or similar. A similar share of users (9% for both bike share and shared e-scooters) said that the main reason for their shared micromobility trip was visiting friends and family. 4% (e-scooter) and 5% (bike) stated another reason.

> *"I really enjoyed using the scooters to get around Bristol, for example going into town from where I live or going home from the gym... I also liked how I wouldn't have to worry about parking my car."*
>
> Female user from Bristol, 21-24

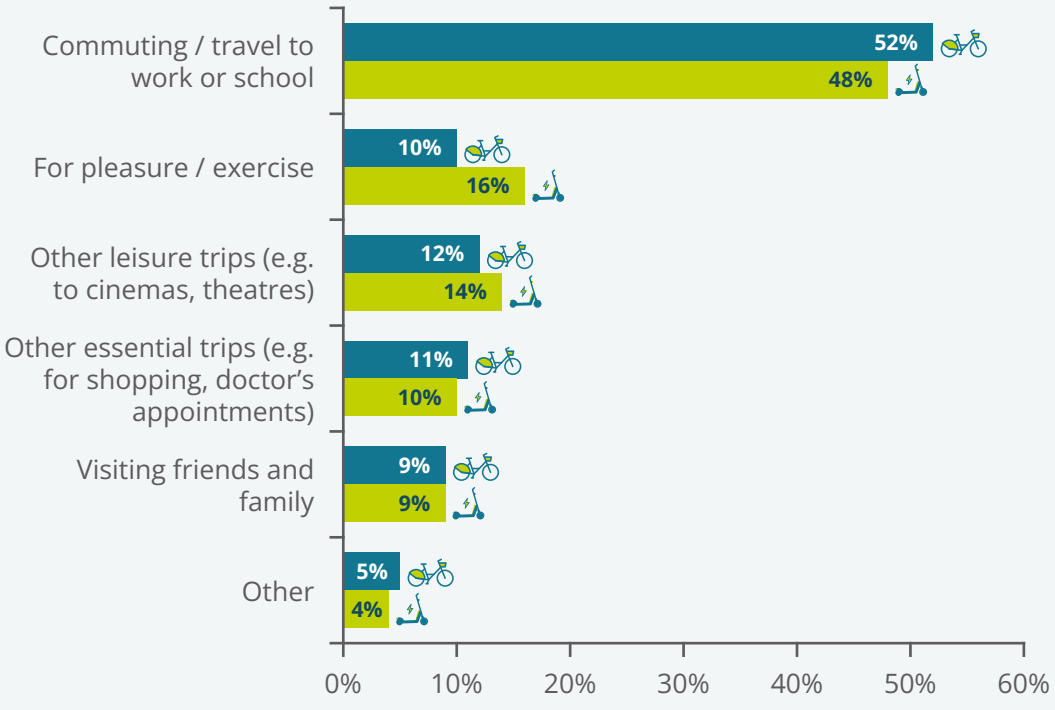
52%

of active users said that their most common reason for a bike share trip in the last 12 months was to travel to work or school

48%

of active users said that their most common reason for a shared e-scooter trip in the last 12 months was to travel to work or school."

Active users' most common reason to hire a shared micromobility vehicle



> *"I work early mornings and late nights and using an e-scooter has allowed me to get to and from work quicker."*
>
> Female user from Cambridge, 25-34

Cargo bikes

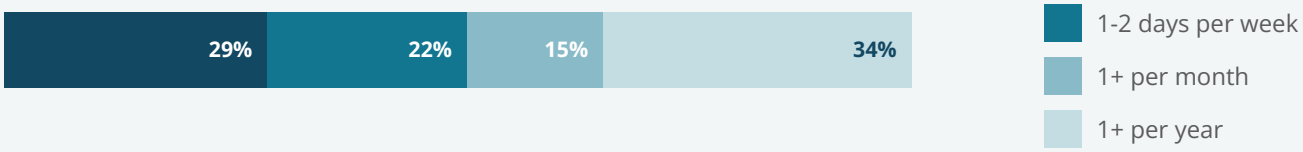
Cargo bike rental schemes represent a slightly different model of bike sharing. Only a few bike share operators include cargo bikes in their on-street fleets. In some schemes, bike share operators offer cargo bike for longer-term hires at set parking locations.

Among the active shared micromobility users in our sample, only 3% (150 respondents) had ever used a cargo bike as part of a bike share scheme. Among those respondents who had used a cargo bike, however, many reported to use cargo bikes on a regular basis. 29% of users said that they used cargo bikes at least 3 times per week. 22% stated that they used cargo bikes at least once or twice per week. 15% used them at least once a month, and 34% said that they used cargo bikes at least once a year.

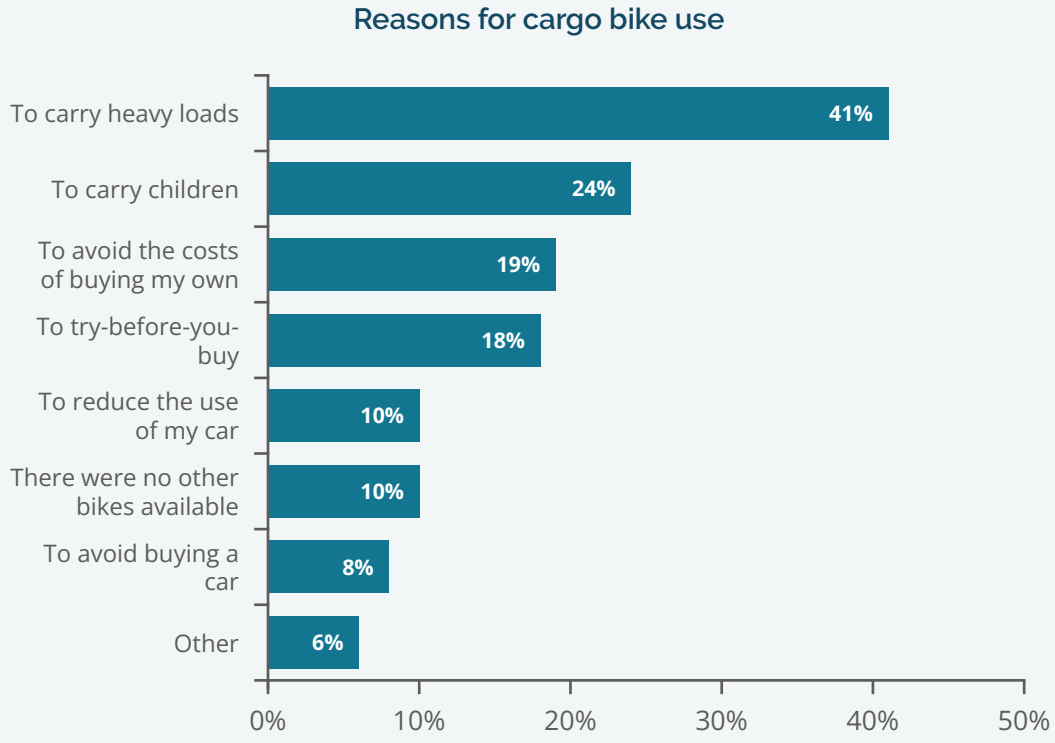
51%

of those using cargo bikes did so at least once a week

Frequency of cargo bike usage among cargo bike users (3% of sample)



Beryl cargo bikes



As might be expected, the reasons for cargo bike use varied substantially from the trip purposes of other shared micromobility vehicles. In response to a question where respondents could select multiple answers, 41% of users said that they used cargo bikes to carry heavy loads; 24% used them to carry children; 19% used them to avoid the costs of buying their own cargo bike; 18% rented them to "try-before-you-buy"; 10% said that they used a cargo bike to reduce the use of their car; 10% used them because no other bikes were available; and 8% said that they used the cargo bike to avoid buying a car. 6% mentioned other reasons.

41%

of users use cargo bikes to carry heavy loads

Beryl cargo bikes

The impact of shared micromobility on travel behaviour

As the regularity and practicality of shared micromobility use for most respondents would suggest, shared micromobility has a substantial impact on how users travel and how they use various modes of transport. Two aspects of behaviour change are particularly striking. Firstly, shared micromobility users travel more actively; and secondly, shared micromobility users drive less. This behaviour change results in measurable benefits for the environment and in a reduction of greenhouse gas emissions. Shared micromobility can thus play a crucial role in achieving Net Zero goals at the national, regional and local level.

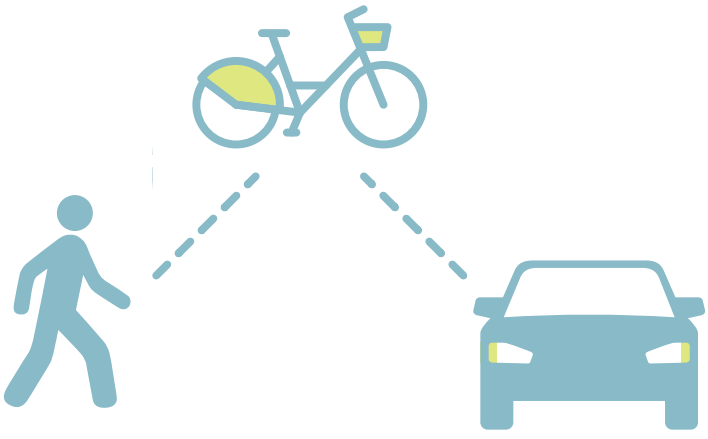


Image: Lime, London

Increase in active travel

All active micromobility users were asked whether their travel behaviour had changed since they started using shared bikes and/or e-scooters. Over two thirds, 69%, of all active micromobility users reported that they cycle more often (34%) or much more often (36%) since they started using shared bikes and/or e-scooters. Only 5% of shared micromobility users said that they cycled less since using shared micromobility. 21% said that they cycle around the same amount of time as before and 5% said that they did not know or that the question was not applicable.

Even among those users who had not used bike share in the last 12 months but only used shared e-scooters, 27% said that they cycled more often or much more often than before using shared micromobility. This compares to only 13% who said that they cycled less. 25% of exclusive e-scooter users said that they cycled around the same amount of time. 36% said that they did not know or that the question was not applicable.

25%

of active users of shared bikes and/or e-scooters walk more often or much more often since starting to use shared micromobility

69%

of active users of shared bikes and/or e-scooters cycle more often or much more often since starting to use shared micromobility; this includes 27% of exclusive shared e-scooters users who now cycle more or much more often

47%

of all active bike share users stated that bike share had led them to cycle for the first time in at least year or for the first time ever

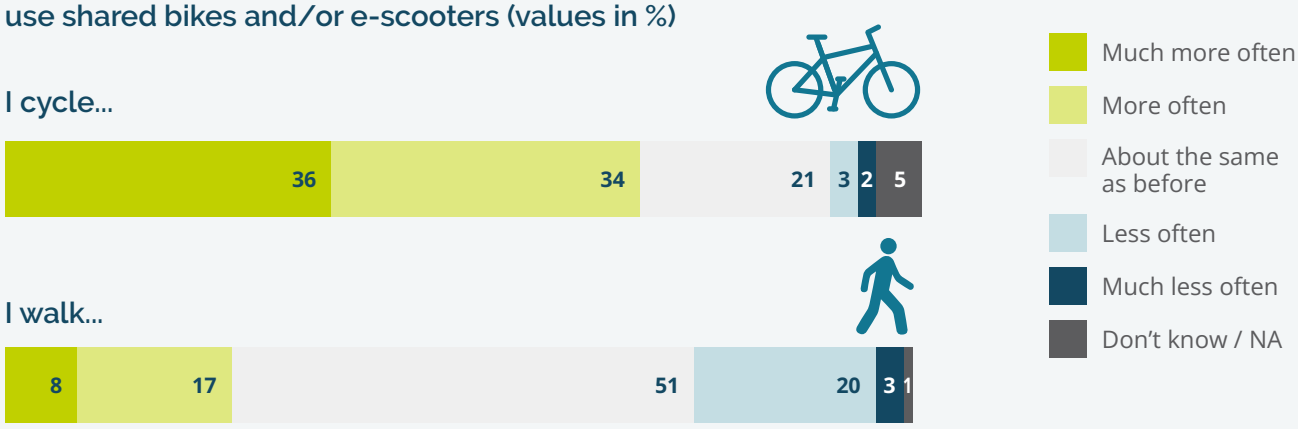
*Photo credit: **Bing Zhang***

Shared micromobility does not only incentivise users to cycle more frequently. It also encourages people to start cycling either after long breaks or even for the first time ever. Active users of bike share were asked about this. In response, 47% of all active bike share users stated that bike share had led them to cycle for the first time in at least a year or for the first time ever. Among those were 25% who said that they had not cycled in 1 to 4 years and 19% who said that they had not cycled in 5 years or more. 3% said that bike share had led them to cycle for the first time ever. 50% said that they were already cycling when they started using bike share, and 3% said that they were not sure. This finding is corroborated by a series of past survey results: since 2020, CoMoUK bike share research has consistently found that the split between bike share users who have not cycled in at least a year (if ever) compared to those users who are already cycling is approximately 50:50.

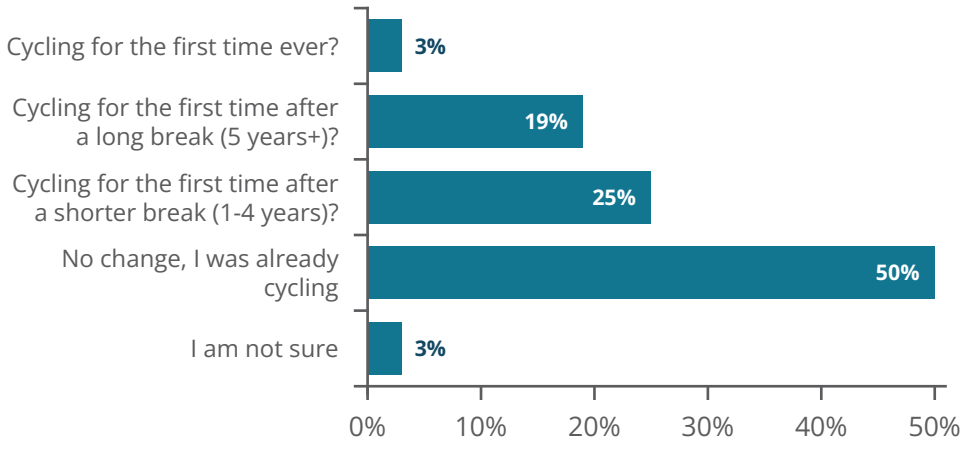
> *"It's been amazing. I hadn't used a bike for over 20 years. The availability of shared bikes gave me the opportunity to go places without having to use my car, get exercise and this led to a positive impact on my health and fitness."*
>
> Male user from Worcester, 35-44

Our survey data also shows that the use of shared micromobility has a positive net impact on users' likelihood of walking. 25% of active shared micromobility users reported that they walk much more often (8%) or more often (17%) than before using shared micromobility, compared to 24% who reported walking less often (20%) or much less often (3%). 51% of active users reported no change on time spent walking. 1% replied "don't know" or "not applicable".

Active users' change in active travel since starting to use shared bikes and/or e-scooters (values in %)



Effect of bike share on active users' cycling behaviour ("Did hiring a bike from a bike share scheme lead to you...")



Reduced car use through shared micromobility

On average, shared micromobility users drive less once they start using bike share and/or shared e-scooters. 40% of active micromobility users stated that they have driven a car or van either much less often (21%) or less often (19%) since starting to use bike share and/or shared e-scooters.

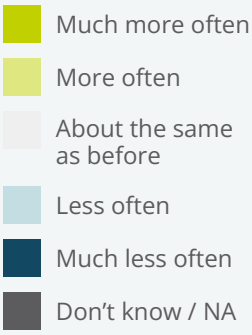
> *"I hate driving to work... These bike schemes mean I can commute without driving which is not only better for the planet but also makes me a better person."*
>
> Female user from Greater Manchester, 35-44

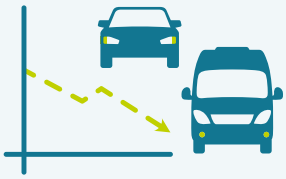
27% of respondents said that they now drive about the same amount of time, and only 3% report that they now drive much more or more often than before using bike or e-scooter share. 31% of active users said that they did not know or that the question did not apply to them.

Shared micromobility users are also less likely to own a car than the average person. Of the active shared micromobility users in our sample, only 39% said that they own a car, 9% said that they share or borrow a car, 5% are part of a car club, and 47% said that they do not have use of a car at all. This compares to 78% of households in England who had access to one or more cars or vans in 2023.[1]

Changes in active shared micromobility users' frequency of car use since starting to use shared bikes and/or e-scooters

I drive a car or van...





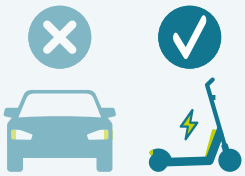
30%

of active micromobility users drive cars or vans less often or much less often since they started using shared micromobility

The questions reported above refer to general changes in micromobility users' travel behaviour since starting to use bike share/shared e-scooters. In addition, our survey asked which mode of transport users would have used for their most common bike share trip, and, separately, their most common shared e-scooter trip if shared micromobility had not been available. Respondents were asked to select the mode that would have taken up the longest part of that particular journey.

1 Driving licence holding and vehicle availability: NTS0205a

Among all active bike share users, 16% said that they would have used a car for their most common bike share journey if bike share had not been available. Of these respondents, 7% would have driven a car themselves, 7% would have taken a taxi or private hire car, and 2% would have used a car as a passenger.



21%

of all shared e-scooter trips by active users replace trips that would otherwise have been made by car

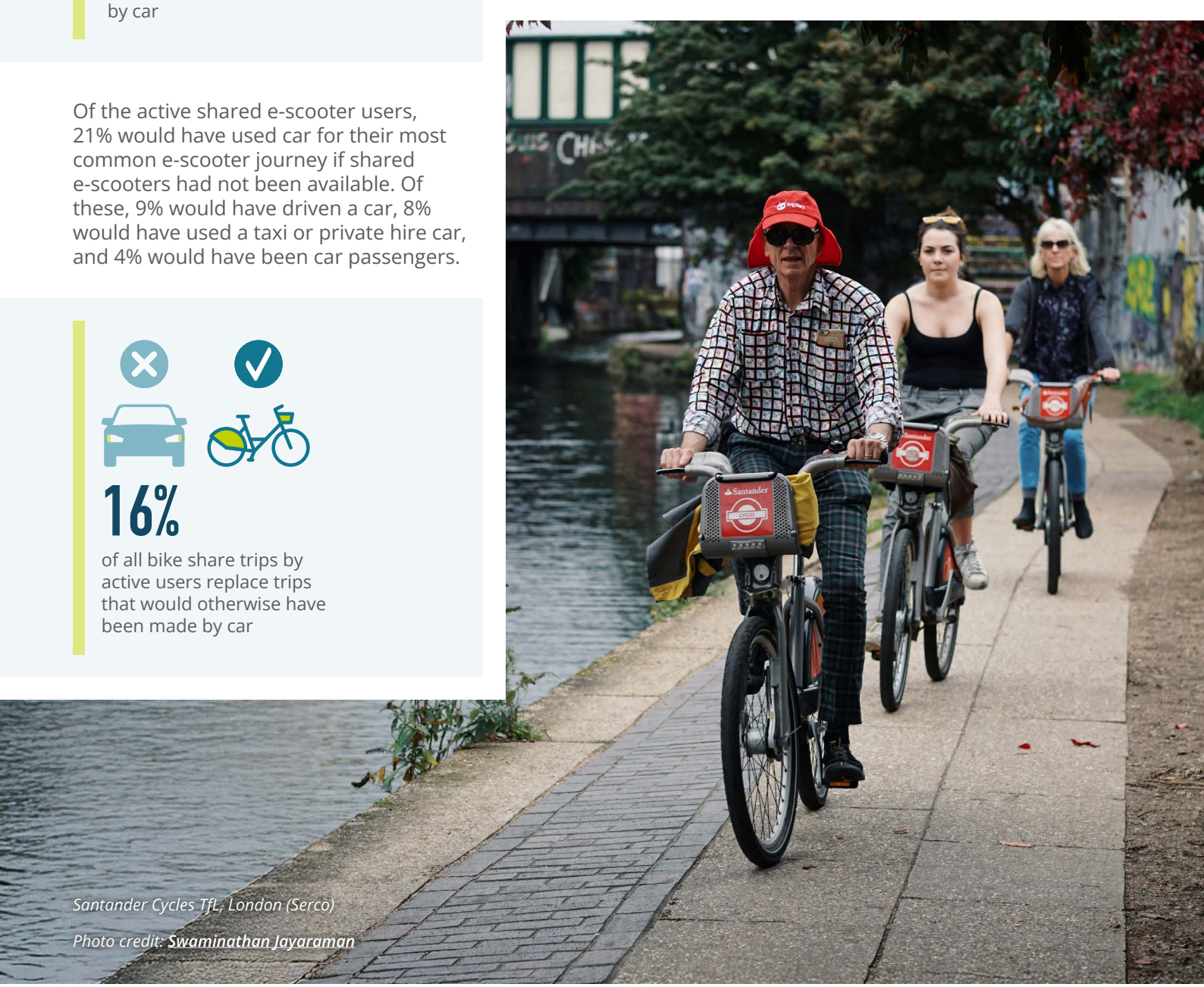
Of the active shared e-scooter users, 21% would have used car for their most common e-scooter journey if shared e-scooters had not been available. Of these, 9% would have driven a car, 8% would have used a taxi or private hire car, and 4% would have been car passengers.

16%

of all bike share trips by active users replace trips that would otherwise have been made by car

Additionally, 25% of active bike share users said that they would have used a bus if bike share had not been available for their most common bike share trip; 23% would have used underground, light rail or tram; 17% would have walked; 7% would have used their own bike; 5% would have used a train; 4% said that they would not have made the trip; 2% would have used a shared e-scooter; 1% said "Park and Ride" and 1% answered "other".

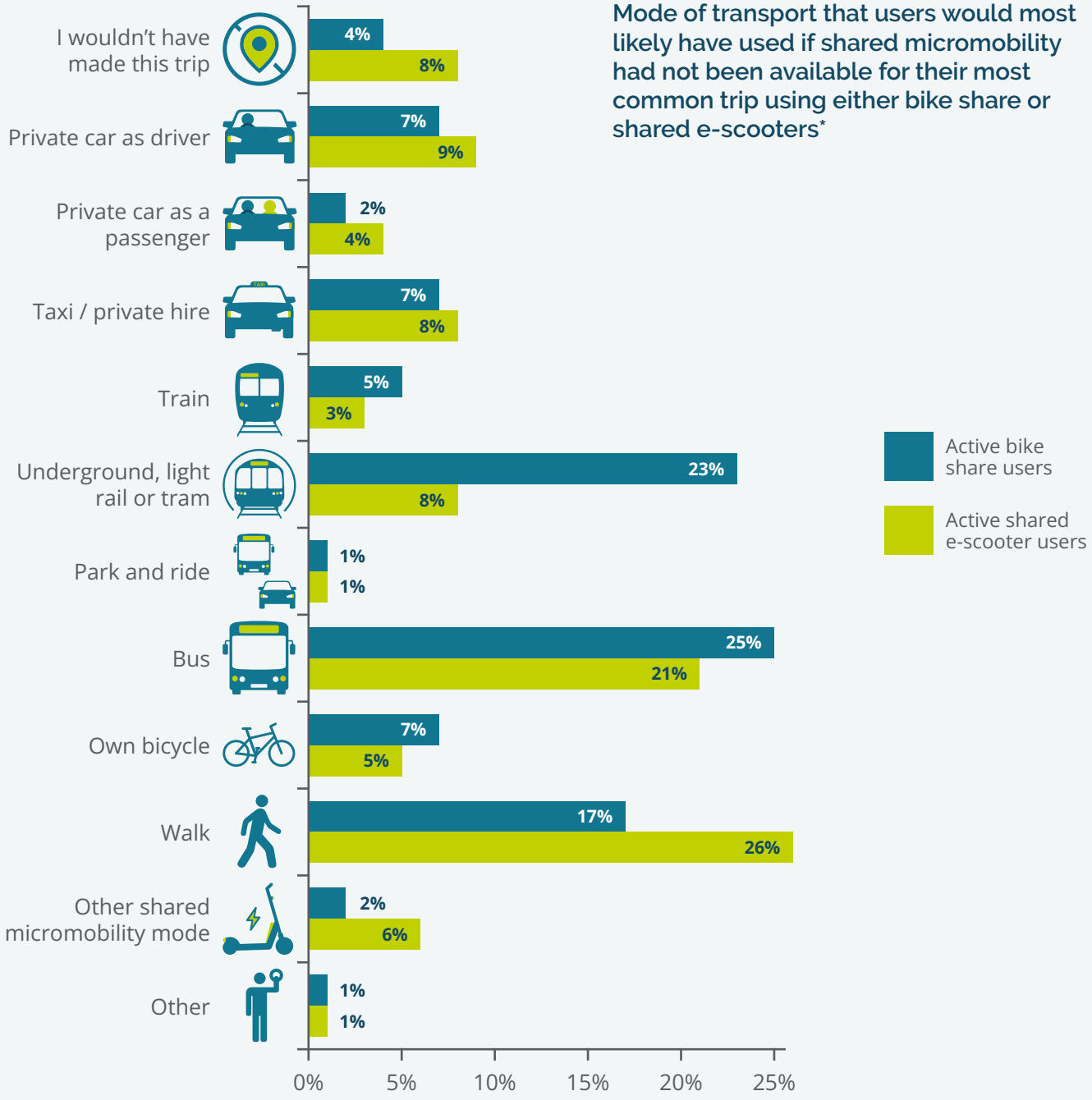
With regards to e-scooter trips, 26% of active shared e-scooter users said that they would have walked if a shared e-scooter had not been available for their most common trip; 21% would have taken a bus; 8% would not have made the trip; another 8% would have used underground light rail or tram; 6% would have used bike share; 5% their own bike; 3% a train; 1% said "park and ride" and 1% answered "other".



Santander Cycles TfL, London (Serco)

Photo credit: Swaminathan Jayaraman

Mode of transport that users would most likely have used if shared micromobility had not been available for their most common trip using either bike share or shared e-scooters*




OVO Bikes, Glasgow (nextbike by Tier)

"I love the bikes. They have revolutionised my life. I sold my car in February 2024 and rely on bike share quite a lot... So nice not having to worry about bike maintenance or theft."

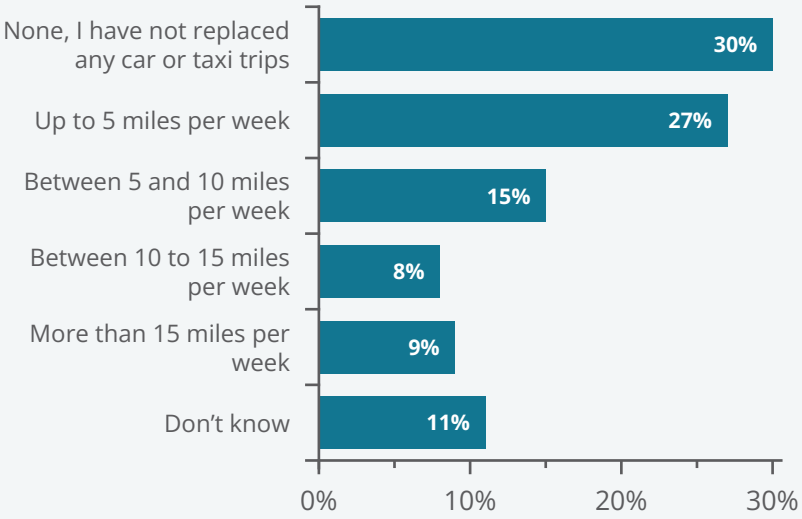
Female user from London, 65-74

Carbon reduction through behaviour change and shared micromobility

To estimate the environmental impact of shared mobility-induced behaviour change, we asked survey respondents: "How many miles that you previously travelled by car or taxi do you now travel by bike share or e-scooter every week?" While 30% of respondents said that they had not replaced any car or taxi trips, and 11% said that they did not know, 59% of active micromobility users stated that they did replace car trips with shared micromobility.

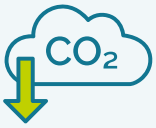
27% of active users said that they replaced up to 5 car or taxi miles per week with shared micromobility. 15% said that they replaced 5 to 10 miles per week. 8% reported replacing 10 to 15 car or taxi miles per week and 9% replaced more than 15 miles per week.

Weekly distances previously travelled by car or taxi that active users now travel by shared micromobility



230 miles

are replaced by shared micromobility trips per average active user every year that would otherwise have been taken by car



61.7kg

CO_2e are reduced, on average, by every active shared micromobility user per year, thanks to car miles that are replaced by shared bikes and e-scooters

Based on these numbers, we estimate that each active shared micromobility user who replaced car trips with shared micromobility, reduced their car mileage by 7.5 miles per week on average, and that, across the sample as a whole, there is an average reduction of 4.4 car miles per week per active user.[1] This equates to a 5% reduction in the typical mileage travelled by car by the average person, given that, in 2023, the average person in England travelled 4,745 miles in a private car, taxi or minicab.[2] Such a reduction in annual car mileage equates to a 61.7 kilogram reduction in CO_2e emissions per shared micromobility user per year or, when scaled up to all 3.1 million shared micromobility users in the UK, to a reduction of 193,000 tonnes of CO_2e emissions.[3]

1 We calculate this using the mid-points of each range and conservatively assuming that >15 miles may average 17.5 miles per week and that those specifying "don't know" did not replace any car miles. An annual mileage is calculated by multiplying the weekly figure by 52, using the unrounded data, to give a figure, per active micromobility user, of 229.9 miles p.a.

2 Combined figure for car driver, car passenger, taxi and minicab use. National Travel Survey 2023: NTS0303c

3 This is based on the assumption that an average car in the UK emitted 0.2686 kg CO_2e per mile (for a car of unknown fuel type, gov.uk: Greenhouse gas reporting: conversion factors 2024), and that shared micromobility have zero tailpipe emission. The estimate does not consider the lifecycle emissions of any vehicles.

Individual and collective benefits of shared micromobility use

Shared micromobility provides a range of benefits to individual users and to the wider public. Individual benefits include improved physical and mental health thanks to, among other things, spending more time outdoors when using shared micromobility. Collective benefits result from, for example, increased efficiency in local transportation systems.

Our survey provided shared micromobility users with a range of statements on bike sharing and shared e-scooters, respectively. Respondents were asked to choose which, if any, of the statements applied to them. They could select more than one option.

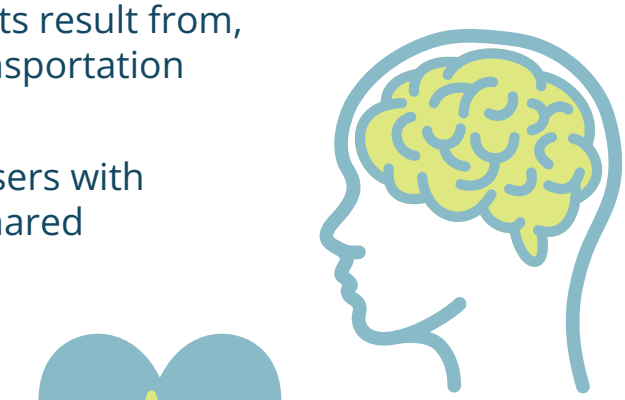


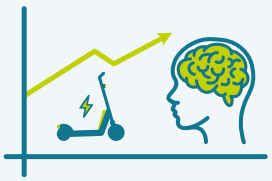
Image: Santander Cycles TfL, London (Serco)

Physical and mental health benefits

More than half of active bike share users (56%) agreed that bike share provides them with exercise. In contrast, only 16% of active e-scooter users said that e-scooters provide them with exercise.

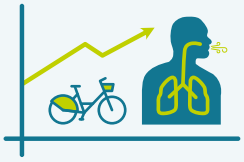
The gap between the two shared micromobility modes was smaller for mental health. 44% of bike share users indicated that bike share provides them with mental health benefits, as did 26% of shared e-scooter users.

About 1 in 5 users of each mode also agreed with the statement that bike share (23%) and shared e-scooters (21%) allow them to do trips with other people.



26%

of shared e-scooter users say that shared e-scooter usage provides them with mental health benefits



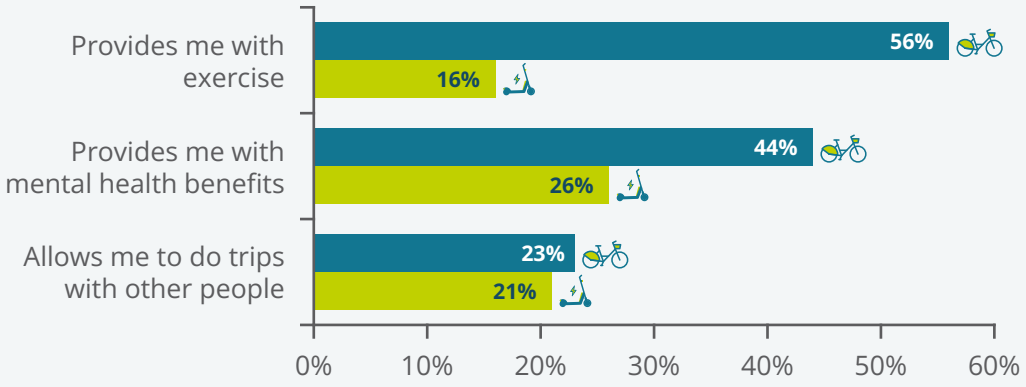
56%

of bike share users confirm that bike share provides them with exercise

These answers indicate that shared micromobility contributes to many users' physical, mental and social well-being. Shared micromobility can, hence, further users' health on multiple dimensions and can help local authorities, employers and other stakeholders to support a comprehensive approach to health and well-being and to realise Health in All Policies (HiAP).[1]

> *"I love the ease of shared bikes... Helps me with my mental health and exercise a lot!"*
>
> Female user from London, under 21

Health and well-being benefits of shared micromobility (Share of users who report that each statement about bike share or shared e-scooters applies to them)



1 Local Government Association: Health in all policies: a manual for local government

Voi

> *"It's massively improved my mental health being able to cycle to my appointments whenever I want, instead of waiting for the very inconsistent bus service in my area. It's also a lot cheaper, and I feel good after getting the exercise, as I really struggle to self-motivate otherwise."*
>
> Male user from Norwich, 35-44

> *"The bikes and scooters allow me and my friend to get round the city easier, more cheaply and more fun than a car."*
>
> Female user from Colchester, 21-24

> *"The bikes ignited my passion for cycling at a time when I didn't exercise much or do any specific sport other than dancing... Cycling improved my health, and my mood, and my stamina, and kept me sane in an otherwise miserable, depressing situation. It gave me something to work hard on, daily pushing my limits."*
>
> Male user from London, 25-34

Inclusivity and benefits for users with disabilities

The self-reported health benefits of shared micromobility use are even more pronounced among users with a disability.[1] Markedly more bike share and shared e-scooter users with a disability agree with statements that shared micromobility use improves their physical and mental health.

Specifically, while 56% of users without a disability confirm that bike share provides them with exercise, 62% of users with a disability do so. With regards to mental health benefits, 43% of users without a disability say that they receive these from bike share use, compared to 56% of users with a disability.

62%

of bike share users with a disability say that bike share provides them with exercise

49%

of shared e-scooter users with a disability say that e-scooters provide them with mental health benefits

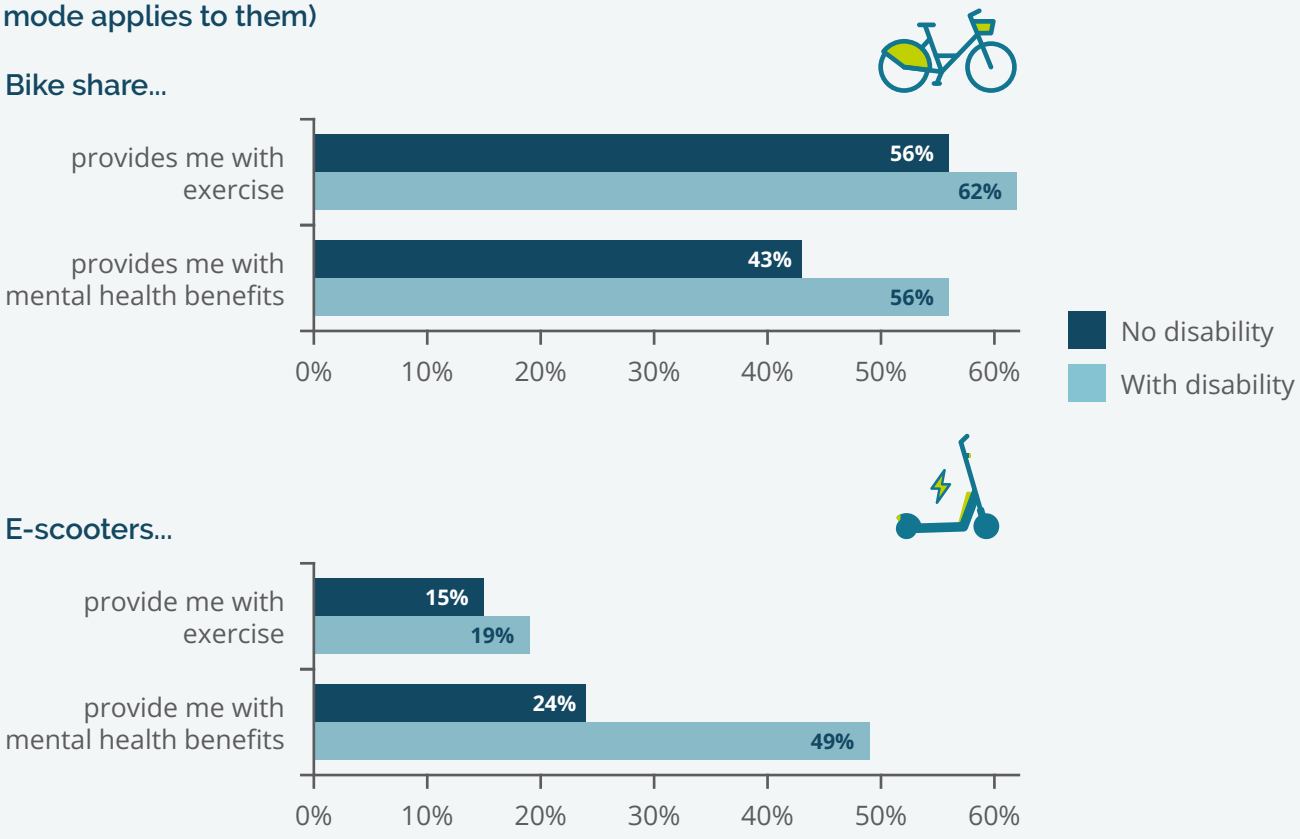
The difference between users with and without a disability is even more striking concerning the mental health benefits of shared e-scooter use. The share of disabled users who report mental health benefits from shared e-scooter use is double that of users without a disability. While only 24% of non-disabled users claim mental health benefits from shared e-scooter use, 49% of users with a disability do so. 19% of e-scooter users with a disability also say that e-scooter use provides them with exercise, compared to 15% of users without disability.

Santander Cycles TfL, London (Serco)

Photo credit: Waqar

1 Users who stated that they have health conditions lasting or expected to last more than 12 months that reduce their ability to carry out day-to-day activities, comprising 5% of the overall survey sample and 220 respondents. Of these, 185 were active bike share users and 94 were active e-scooter users. The definition of disability follows the questionnaire of the 2021 Census in England and Wales.

Health and well-being benefits of bike share for users with and without disability (Share of users, by health status, who report that each statement about each mode applies to them)



The disproportionately high health benefits of shared micromobility use for people with disabilities is also a useful reminder that shared micromobility schemes should be made accessible and as easy as possible to use for those individuals who might require additional support. As the quotes below demonstrate, schemes help some people with physical issues walking, who might be otherwise be unable to undertake active travel of any distance.

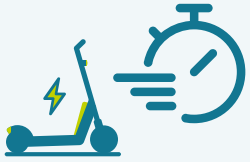
> *"I have a muscular disease. Using normal bikes puts too much strain on me. Using buses can also be difficult if I'm forced to stand for long durations. Bikes give me freedom, because they are powered they never apply strain to my muscles, and my travel is much much quicker. Honestly so fantastic."*
>
> Male user from London, 35-44

> *"I am a person with disability (joint pains) and cannot really walk for long periods of time... When I tried bike share for the first time, I tried it with my boyfriend. It was the most enjoyable experience that made me feel like a child again. We rode side by side on an empty side road grinning like crazy."*
>
> Female user from London, 25-34

> *"I have a disability and I am unable to walk long distances. Using a shared e-scooter helps me."*
>
> Male user from Cambridge, 25-34

Boosting efficiency of transport systems

The most selected answer regarding the benefits of shared micromobility, for both bike share and e-scooter trips, was that shared micromobility makes users' trips quicker. 84% of bike share users and 76% of shared e-scooter users agreed with this statement. In addition, 48% of bike share users and 42% of shared e-scooter users agreed with the statement that shared micromobility helps them avoid traffic congestion and/or parking difficulties.



76%

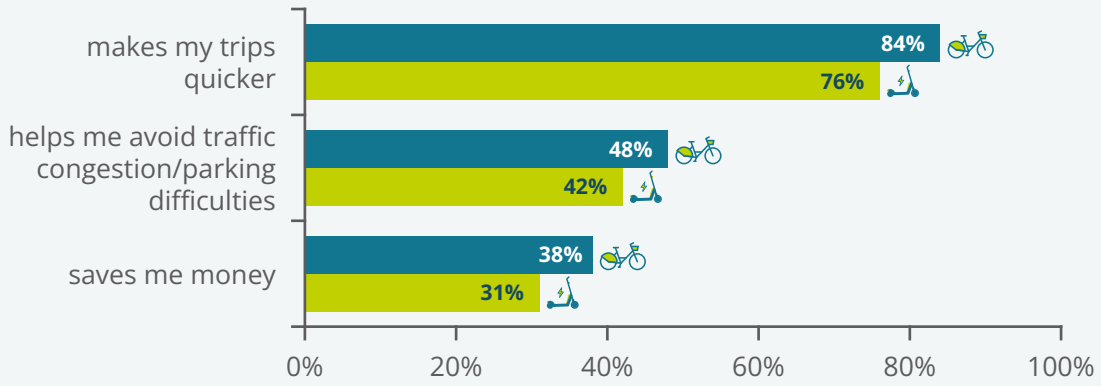
of users say that shared e-scooters make their trip quicker

84%

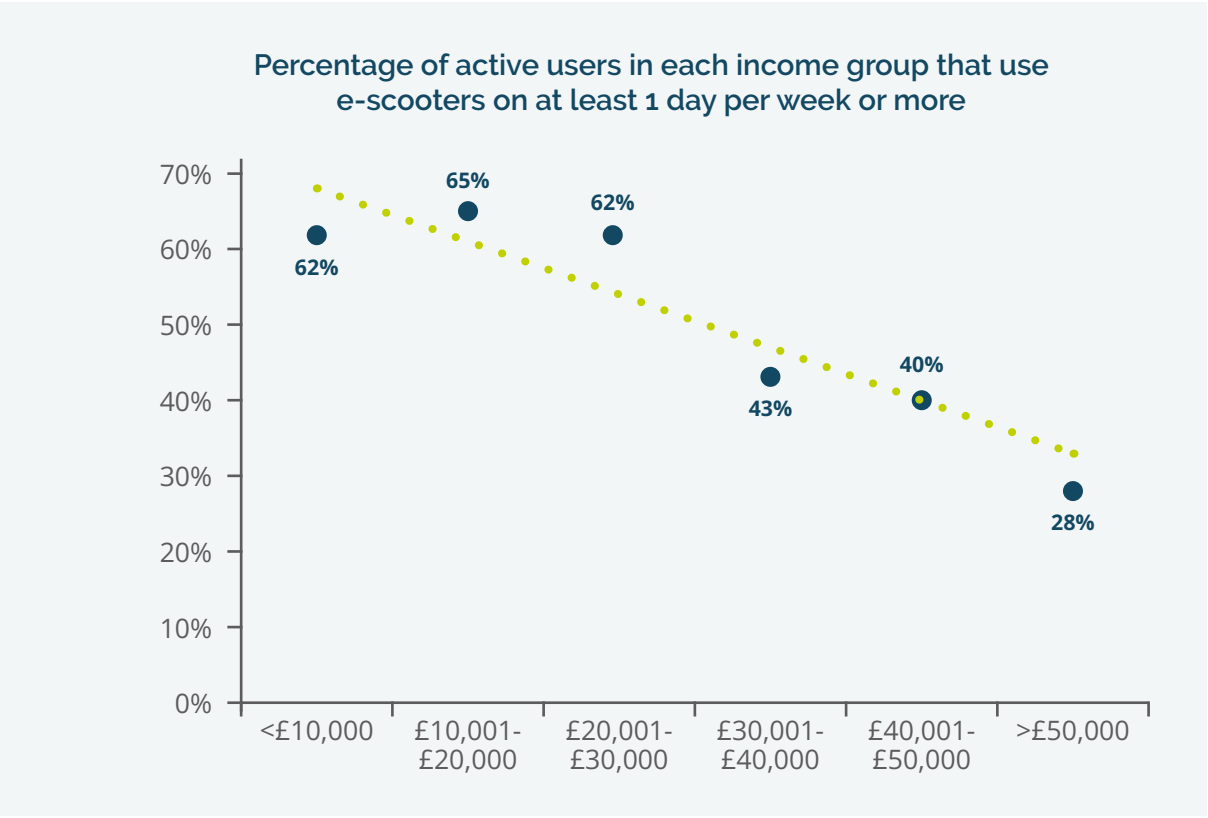
of users say that bike share makes their trip quicker

Around one third of micromobility users also feel that there are financial benefits that come with shared micromobility use. 38% of bike share users and 31% of shared e-scooter users indicated that shared micromobility saves them money. A commitment from all involved stakeholders, including local authorities, is needed to make sure that the costs of shared micromobility are competitive for users and that the financial benefits of shared micromobility use can be maintained and expanded.

Benefits of shared micromobility for local transport systems (Share of users who report that each statement about bike share or shared e-scooters applies to them)



Looking at all active shared e-scooters users by income group, it is also notable that shared e-scooters are particularly providing access to mobility for those on lower incomes. In the income brackets <£10,000, £10,001 to £20,000, and £20,001 to £30,000, between 62% and 65% of all active users are using shared e-scooters at least once a week. In the higher income groups, weekly e-scooter use is less common, with 43% using shared e-scooters at least weekly in the £30,001 to £40,000 income group; 40% in the £40,001 to £50,000 income group; and only 28% in the >£50,0001 income group. In contrast, weekly use of shared e-bike schemes ranges from 59-67% of all income groups, with no clear pattern.



As these findings indicate, shared micromobility plays an essential role in increasing the efficiency of local transport systems (see also the section on Shared micromobility and public transport in this report) by often making journeys quicker, and, for some people, helping them avoid congestion or parking problems and/or save money. In addition, shared micromobility can connect places that cannot be effectively reached by other means of transport in a time and cost-efficient way and provide a space-efficient alternative to cars that helps alleviate traffic congestion and shortages of car parking spaces. Shared micromobility, thus, should be part of the mix to help make towns and cities greener and to re-allocate space away from roads and car parking. Safe travel infrastructure for shared micromobility, such as high capacity cycle path networks, needs to be part of this re-structuring of public space.

> *"I think the service is great. For me, I find it particularly useful if I'm going out in the evenings. Bike or scooter readily available with lights so feel safer going home."*
>
> Female user from Norwich, 55-64

Dott

Collectivising the costs and risks of active travel

Fear of theft can be a major deterrent for investing in a cycle, particularly a more expensive model like an e-bike. Shared micromobility, and bike share in particular, collectivises the costs and risks of using one's own bike for travelling. If the use of privately owned e-scooters is allowed on UK roads, we can expect similar effects from shared e-scooters.

50%

of users confirm that bike share takes away the worry of theft

Currently, 50% of bike share users indicated that "bike share takes away the worry of theft". This statement had not been presented to e-scooter users, since privately owned e-scooters cannot currently be used legally on UK roads.

43%

of users confirm that bike share takes away concerns around bike maintenance and storage

Similarly, 43% of users confirmed that bike share takes away concerns around bike maintenance and storage. Again, this option had not been presented to e-scooter users.

"I always worry about my pedal bike being stolen when I travel anywhere on it so being able to use a shared bike gives me piece of mind that I don't have to bring my lock or constantly keep checking whether my bike is still where I left it. Using these bikes to commute has meant I'm getting more exercise into my day which is beneficial for my physical and mental health. I like that I am not taking up space on a busy train or bus at peak times and I am not adding to road traffic when I commute on the shared bikes. I also find them incredibly fun to ride so I have become a bit addicted!"

Female user from London, 25-34

"I mostly use shared bikes to run errands in the city centre, rather than taking my own bike and risk it being stolen. They are also great for 'one way' journeys, such as to the train station when I don't require my bike at the other end. I normally use my own bike for commuting, but sometimes use the e-bike if I'm tired or injured, or want to arrive at work 'fresh' (there is a significant hill at the end of my journey)! This option saves me using the car."

Female user from Norwich, 35-44

Lime

Shared micromobility and public transport

Shared micromobility trips are frequently part of a longer journey that includes multiple modes of transport. Almost half of all active users said that they combined their most common shared micromobility trip with another means of transport. 49% of all users said that they combined their most common bike share trip in the last 12 months with at least one other mode of transport. Similarly, 44% of all users said that this was true for their most common e-scooter trip.

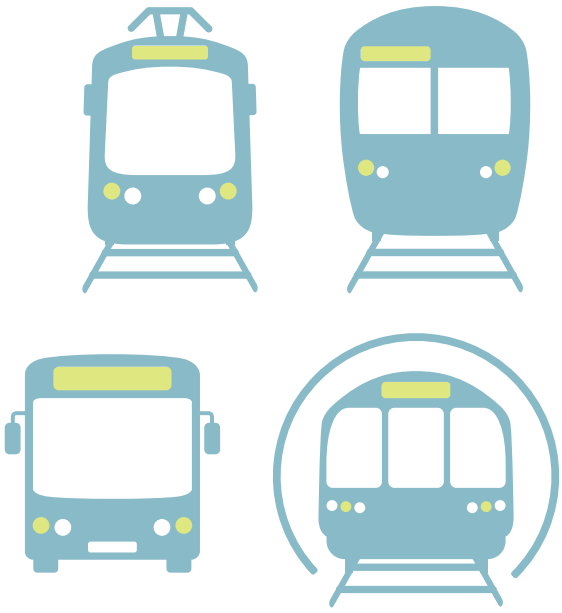


Image: West Midlands Cycle Hire (Serco)

Shared micromobility and multimodal trips

For combined trips, shared micromobility is mainly used in conjunction with public transport. In response to a question where respondents could pick more than one answer option, 21% of active users said that they combined their most common bike share trip with a train ride, 20% with using underground, light rail or tram, and 17% with using a bus. Similarly, 16% of active e-scooter users responded that they used a train in combination with their most common e-scooter trip. 11% combined their most common e-scooter trip with a trip by underground, light rail or tram and 17% with a bus ride.

Only a small minority of active users combine their most common trip with a taxi ride (3% for bike share; 4% for shared e-scooters). These numbers are even lower for private car trips as a driver (2% for bike share; 3% for shared e-scooters) and private car trips as a passenger (1% for bike share; 2% for shared e-scooters). Additionally, only 4% of active bike share users combine their most common bike share trip with an e-scooter ride; and 6% of e-scooter users combine their most common shared e-scooter ride with a bicycle ride.

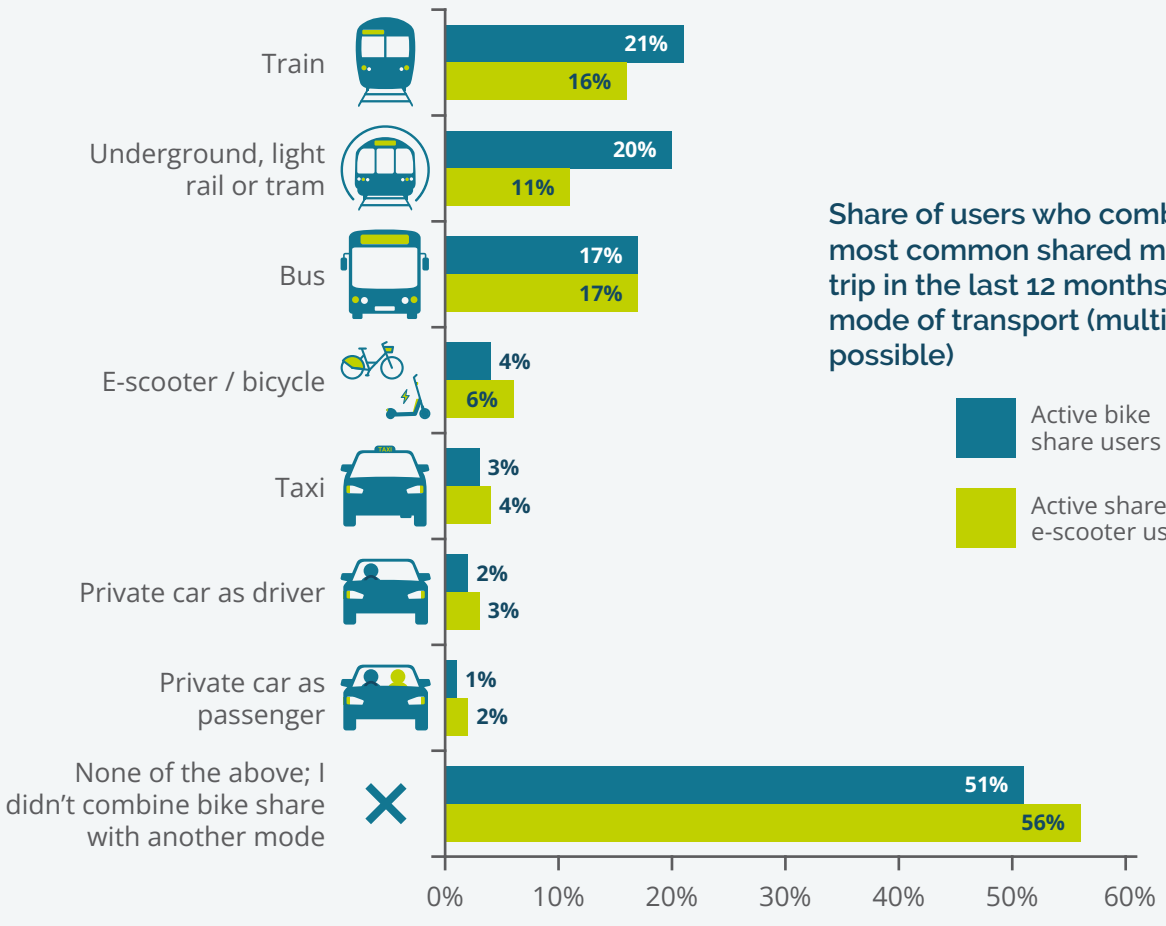
> *"I have a disability which means I can sometimes make one leg of a journey by bike, but not the return leg. I might also do school pick up on the way out with a bike, and return home with another mode of transport."*
>
> Male user from Norwich, 25-34

49%

of active users combine their most common bike share trip with using additional means of transport

44%

of active users combine their most common shared e-scooter trip with using additional means of transport



Share of users who combined their most common shared micromobility trip in the last 12 months with another mode of transport (multiple answers possible)

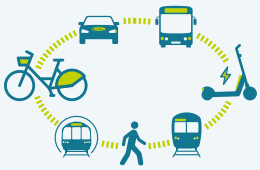
Active bike share users

Active shared e-scooter users

Integrating shared micromobility and public transport

The high volume of multimodal trips that combine shared micromobility and public transport demonstrates the importance of integrating these means of transport to guarantee a seamless travel experience. Easy pick up and return of shared micromobility vehicles at public transport stops is key to encourage wider demographics to make multimodal journeys and to make sustainable transport increasingly competitive compared to the private car.

As part of our survey, we asked shared micromobility users to comment on what works and what does not work well when switching from a shared micromobility vehicle to another mode of transport. Users highlighted that the proximity of shared micromobility parking and public transport services, and in particular, the availability of shared micromobility vehicles and parking options at public transport stops, are crucial for mode integration. The word cloud below shows the frequency of words that were used in the 956 open-ended answers to this question.



68%

of active users who combine their most common bike share or shared e-scooter trip with another mode of transport find switching between shared micromobility and the other mode easy or very easy

All shared micromobility users were asked "When combining bike or scooter trips with another mode of transport, how do you find the switch between modes (e.g. picking up a bike after getting off a train or returning a scooter before getting on a bus)?". Of those shared micromobility users who did combine their most common bike share and/or e-scooter trip with another mode of transport, 25% found switching between shared micromobility and the other mode(s) very easy and 43% found it easy. 20% found this neither easy nor difficult, 8% found it difficult and 2% found it very difficult. 2% said that they did not know or "not applicable".

Evaluation of switching between shared micromobility and other modes of transport as part of the same trip, by active users who combine their most common shared micromobility trip with another mode of transport (value in %)

- Very easy
- Easy
- Neither easy nor difficult
- Difficult
- Very difficult
- Don't know / NA

"I use the e-bikes for when I am travelling one-way across the city. For example when traveling to the train station to go see family/friends - I wouldn't want to leave my own bike locked up outside for anything more than a couple of hours, so using an e-bike is the perfect solution."

Male user from Greater Manchester, 35-44

"I travel a lot for my job. The bikes allow me to use the train rather than drive. I often hire bikes from Truro station but have also used the ones in other parts of Cornwall, Plymouth and Bournemouth."

Female user from Cornwall, 45-54

Santander Cycles, Milton Keynes

CoMoUK offers comprehensive guidance on best practice for integrating shared transport and public transport at mobility hubs. Our guidance includes our report on Rail and shared transport integration, on The design process - mobility hubs realised and our Mobility hubs toolkit. Key points in our guidance are the emphasis on intuitive signage at mobility hubs, effective shared vehicle fleet management to ensure reliable provision of shared vehicles and ensuring inclusive and accessible hub design.

The complementary nature of shared micromobility and other sustainable transport modes

The high share of multimodal trips among shared micromobility rides indicates that shared micromobility can be complementary with public transport. One third, 33%, of all active micromobility users, said that, since starting to use shared micromobility, they were using public transport for about the same amount of time as before. 13% reported that they used public transport more frequently since using shared micromobility (7% more often, 4% much more often), whilst 53% said they were using it less frequently (37% less often, 16% much less often).

> *"Both modes [shared bikes and e-scooters] are so useful and they really make getting around easier, especially [...] where public transport is dire."*
>
> Male user from Bristol, 25-34

At face value, this might indicate that micromobility is undercutting public transport. However, in comments, many respondents mentioned that they use shared micromobility to compensate for the shortcomings of public transport in their local area, to go to places that are not easily accessible by public transport or to travel at times when public transport services operate beyond their capacity or not at all. This was also demonstrated by responses to a specific question, where 45% of bike share users and 39% of shared e-scooter users indicated that shared micromobility connects them to places not served by public transport. In this way, micromobility may help users to sustain car free lives, and thereby indirectly support public transport.

45%

of users agree with the statement that bike share connects them to places not served by public transport

Shared micromobility is also an addition to private bicycle use and ownership, providing more sustainable and active travel options for a wider range of trip purposes. In response to a question with multiple possible answer options, the majority of active micromobility users, 64% indicated that they own some sort of cycle, including 56% who said that they own a pedal bike, 11% said that they own an e-bike, 2% owned a cargo bike and 1% an adapted bike. 36% said that they did not own a bike.

When asked if active shared micromobility users would consider buying an e-scooter if their use was legal on UK roads, 42% respondent yes and 58% said no.

39%

of users agree with the statement that shared e-scooters connects them to places not served by public transport

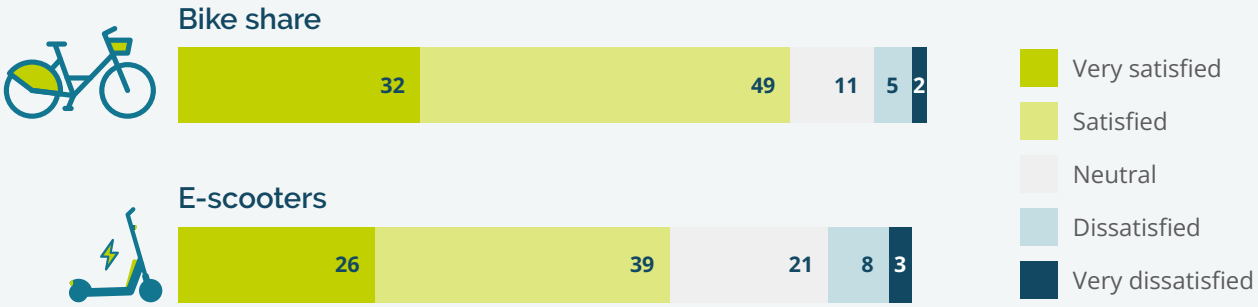
> *"I've been using the e-bike to go out with friends, and could come back late whilst there was no public transport. So the e-bike has removed a hurdle for socialising."*
>
> Male user from London, 35-44

User satisfaction

In addition to the multiple individual and collective benefits that shared micromobility can have, the current provisions of shared bikes and e-scooters in the UK are also rated predominantly positive by their users. For bike share, 32% of users said that they were very satisfied and 49% of users said that they were satisfied with the service that they had used most often in the 12 months before completing the survey. For shared e-scooters, 26% were very satisfied and 39% were satisfied. 11% of bike share users and 21% of e-scooter users were rated the service neutrally. 5% of bike share and 8% of e-scooter users were dissatisfied; only 2% and 5%, respectively, were very dissatisfied with the service that they had used.

Forest, London

User satisfaction of bike share and shared e-scooter users (values in %)



81%

of bike share users are satisfied or very satisfied with the bike share service that they used in the last 12 months

62%

of shared e-scooter users are satisfied or very satisfied with the e-scooter service that they used in the last 12 months

Conclusion & next steps

This report is testament to the power of shared micromobility's exciting and significant reach. We estimate that if shared micromobility schemes could reach their full realistic potential in the UK, they could generate up to 7.4 million trips per day.[1] In other words, based on our research and on the experiences of other countries, there is room for the sector to grow a lot further.

Doing so would bring the benefits of shared micromobility to a wider audience, in turn improving air quality, public health, congestion and equity of access to transport far beyond just the current users of such schemes.

There are some near-term steps that the UK could take to help achieve this. As we publish this report, the UK government is proposing a bike share licensing mechanism as part of the English Devolution Bill. CoMoUK wants this mechanism to be designed in a way that helps bike share grow sustainably for the benefit of users, stakeholders and for the planet.

As this report has shown, the overlap between shared bikes, e-bikes and e-scooters in the UK is enormous. So, future policy in this area should be designed to cover not only shared bikes and e-bikes but also shared e-scooters and any potential future shared micromobility options. Achieving this would require a permanent legal status for shared (and non-shared) e-scooters in the UK, creating the legal certainty that exists in other developed countries. Such fresh primary legislation necessarily takes time. Hence, it is important that the existing e-scooter trials, which otherwise will close in May 2026, are extended and that new trials are allowed where authorities and operators are keen for them to happen.

Finally, across all of shared micromobility, there is a wider need to recognise its manifold benefits with a clear and reliable policy set which supports it and other forms of sustainable transport including where needed, funding support and the wider conditions these options need to thrive.

Please do not hesitate to contact us on info@como.org.uk if you have any questions or would like a discussion.

1 The Full Potential of Shared Transport in England and Wales (p.4)

Dott

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