REPORT BELGIUM **2025**

The impact of
SHARED BICYCLES AND SCOOTERS

SUMMARY

SHARED BICYCLES AND SCOOTERS FILL THE GAPS IN PUBLIC TRANSPORT

Unique Belgian study reveals structural impact of shared bicycles and scooters

Ghent, 17 September 2025 – For the first time in Belgium, eight shared bicycle and scooter providers, in conjunction with Way To Go and the University of Antwerp, have investigated the impact of bicycle and scooter sharing. A survey of 4,100 users shows that bicycle and scooter sharers get about more sustainably than the average person in Flanders.

Bicycle and scooter sharers get about more sustainably than the average person in Flanders

More often by public transport or on foot

Shared bicycle and scooter users are **much more likely to take the bus, tram and metro** each week than the average person in Flanders (29% of shared bicycle users and 41% of shared scooter users vs 11% of people in Flanders). They are **much more likely to take the train** each week (29% of shared bicycle users and 28% of Flanders residents) and also **more likely to go on foot** (87% of shared bicycle users and 86% of shared scooter users vs 76% on average).

Micromobility partly replaces active mobility, but also a significant number of car journeys

Opportunities for combined public transport and shared bicycle or scooter tickets

Why do people opt for a shared bicycle or scooter? Users turn to shared bicycles or scooters when there are no or too few buses or trams running, to avoid rush hour congestion or to get home quickly and safely in the evening when public transport is no longer running. In other words, these are often strategic choices that supplement public transport.

'This confirms that shared mobility has become a **necessary link** in the mobility mix, not just a spur-of-the-moment choice,' says Way To Go director Jeffrey Matthijs. 'Shared bicycles and scooters and public transport are not rivals – they complement each other. There are clear opportunities here for public transport operators to create combined tickets and season tickets that integrate shared bicycles and scooters with public transport.'

Sharing is the new owning

The influence of shared mobility extends beyond day-to-day travel behaviour. Users own significantly fewer vehicles: 43% do not have a car of their own (compared with only 19% of the Flemish population) and only 65% have their own bicycle (vs 80% on average). Shared mobility is also prompting people to get rid of their own vehicles: in the 12 months prior to the survey, 6% of respondents got rid of their own car and 5% got rid of their own bicycle.

Users of shared scooters are younger, and 66% are male

The study reveals clear differences between shared bicycle and shared scooter users. **Bicycle sharers** tend to be older (an average of 41 years), well educated, and more likely to live in smaller households. The male-female ratio is almost evenly balanced. **Scooter sharers** are younger (33 years), are more often students and frequently still live at home or in student accommodation. They are more likely to be male (66%), less likely to have a driving licence and more likely to come from a migrant background.

Answering the sceptics: a genuinely sustainable impact

The study acknowledges the criticism that shared bicycles and scooters to some extent replace travel by bus, tram or on foot. In the absence of shared bicycles, 45% would revert to public transport and 52% would walk. But shared bicycles and scooters are also replacing many car journeys. In the absence of shared bicycles, 17% of bicycle sharers would opt to use a car. Among users of shared scooters, the figure is 11%.

'So micromobility partly replaces active mobility, but also a significant number of car journeys,' emphasises Jeffrey Matthijs. 'What's more, users of shared bicycles and scooters are much more likely to walk and take public transport than the average Flemish person. The overall impact is clearly positive for sustainable mobility.'

Wide-ranging and reliable

The study was conducted in May 2025 by the University of Antwerp, and featured a representative sample of 4,100 respondents. Eight shared bicycle and scooter providers supplied data and collaborated on a single joint questionnaire – a first in Belgium.

CONTENTS

1—

WHAT ARE **SHARED BICYCLES AND SCOOTERS?**

This report is about shared bicycles, shared cargo bikes and shared scooters, or shared micromobility. It is a specific form of shared mobility. Shared mobility refers to the concept of mobility services provided in a shared manner, allowing people to use vehicles together or sequentially. Within this concept, we distinguish between carsharing, shared bicycles, shared cargo bikes and shared scooters.

The aim of shared mobility is to optimise the use of resources, reduce traffic congestion and generally make our transport system more efficient. The impact of carsharing on travel behaviour and vehicle ownership has already been demonstrated. This report focuses on the impact on users of shared bicycles and scooters.

Shared bicycles, cargo bikes and scooters can be classified by their operational characteristics. We distinguish three different categories: back-to-one, back-to-many and free-floating.

In this report, micromobility refers to shared micromobility and therefore to shared bicycles, shared cargo bikes and shared scooters

BACK-TO-ONE SHARED BICYCLES AND SCOOTERS

In back-to-one systems, the user returns the vehicle to the same location after use.

BACK-TO-MANY SHARED BICYCLES AND SCOOTERS

In back-to-many systems the user does not have to return the vehicle to the point of departure. Within this category, we distinguish back-to-many systems **with fixed stations** where users bring the vehicle to a fixed physical station (e.g. Velo in Antwerp) and back-to-many systems **without fixed stations** allowing users to leave the vehicle in physical or digital drop zones.

FREE-FLOATING SHARED BICYCLES AND SCOOTERS

In free-floating systems, users need not return the vehicle to the point of departure, nor do they have to leave it in a designated parking or drop zone. These vehicles can be picked up and dropped off by users anywhere in the city or operational zone. In practice, this form is rarely found. Most cities have regulated micromobility so as to avoid shared scooters and bicycles that can be 'abandoned' all around the town.

2 —

METHODOLOGY

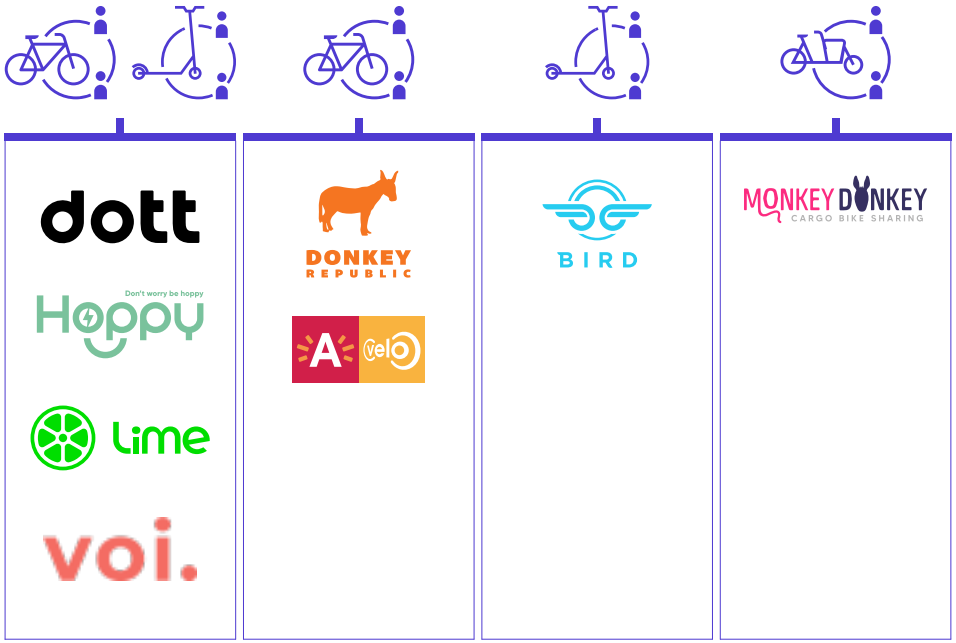
SURVEY OF USERS OF SHARED BICYCLES, CARGO BIKES AND SCOOTERS IN BELGIUM

All the findings in this report are based on an online user survey conducted in May 2025 among users of shared bicycles, shared scooters and shared cargo bikes in Belgium. Eight of the thirteen providers then active in Belgium took place in the research.

The questionnaire was drafted by Way To Go and Antwerp University and finalised in consultation with providers. The providers invited their customers to take part via an initial email and a reminder.

The online questionnaire was managed by the University of Antwerp.

Throughout the entire process – from research design to the analysis of the results – we were able to call on the valuable support of Elnert Coenegrachts, researcher at the Department of Transport and Regional Economics at the University of Antwerp. The University of Antwerp is also project partner of Way To Go within the Interreg North Sea Region project ShareDiMobiHub.



The user survey delivered a dataset of 4,100 respondents, making it statistically robust for the more than 2 million active users of micromobility in Belgium. The results offer a confidence level of 95%, with a margin of error of ±1.5% for shared bicycles and ±3.4% for shared scooters. However, additional research is needed to make statistically refined statements about the different forms of shared bicycles and shared scooters, or about regional differences. This is because 95% of the respondents come from Flanders.

This report does not include the findings on cargo bikes because the number of respondents in this group is low. Only 157 respondents (3.7%) had used a cargo bike in the past year. The provider Cargoroo had intended to take part in the joint survey, but had to close its operations at the end of 2024 and thus did not promote the survey.

As the sample is mainly Flemish, the results on vehicle ownership and modal split were only compared with the Flemish Travel Behaviour Survey (Onderzoek Verplaatsingsgedrag Vlaanderen or OVG). In total, more than nine in ten respondents (91.5%) had used a shared bicycle at least once in the past year. One in five (20.5%) had made at least one trip using a shared scooter, and 3.8% had used a shared cargo bike. 634 respondents (15%) had used both shared scooters and shared bicycles. Chapter 3 takes a closer look at the profile of these respondents.

3 —

PROFILE OF SHARED BICYCLE AND SHARED SCOOTER USERS

PLACE OF RESIDENCE

The vast majority of respondents (95%) live in Flanders, with a marked concentration in the city of Antwerp (70%). This strong representation is largely explained by the large proportion of respondents using Velo shared bicycles, which are operated exclusively in Antwerp. Respondents using shared bicycles live almost exclusively in Flanders (96.9%). Respondents using shared scooters are also mainly based in Flanders (84%), but here the proportion of Brussels residents (13%) is relatively high in comparison with other groups. This group also includes the highest proportion of respondents from Wallonia (3.5%).

GENDER

Men (54%) form a slight majority of micromobility users, vs. 44% women. 0.6% do not identify as male or female, and 1.2% chose not to answer.

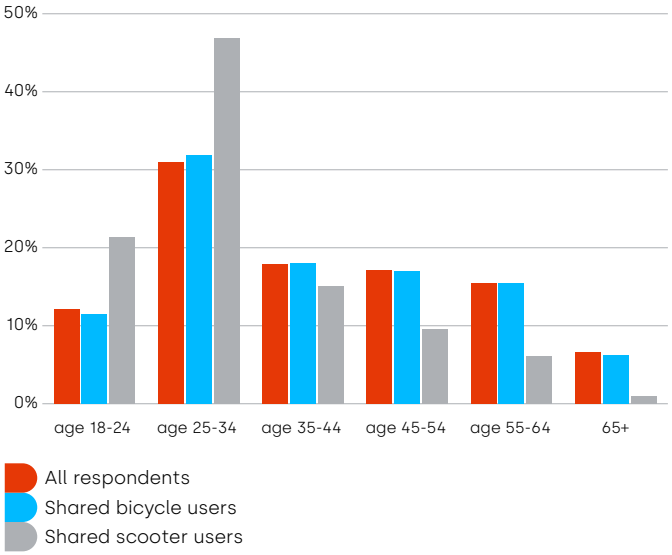
However, the male-female ratio varies significantly depending on the mode. Users of shared bicycles are fairly evenly distributed (52.4% men, 46% women), although we suspect that fundamental differences between genders may also be apparent across the various forms and providers. The majority of shared scooter users are men (66%).

AGE

The age distribution shows that the largest group in all categories consists of respondents between the ages of 25 and 34. Respondents in this group account for as much as 47% of shared scooter users. Young adults (aged 18–24) account for 21% of shared scooter users, almost double their proportion among shared bicycle users (11%). Finally, 39% of shared bicycle users are aged 45 or older, compared to only 17% of shared scooter users.

The average age of respondents was 41 years. The average of shared bicycle users is also 41 years. Among users of shared scooters, the average age is significantly lower, at 33 years.

Age distribution of micromobility users



MIGRANT BACKGROUND

20% of respondents have a migrant background, determined on the basis of their parents' country of birth. This rises to 29% for shared scooter users.

FAMILY COMPOSITION

The majority of micromobility users live in smaller households. Nevertheless, there are striking differences between users of shared bicycles and shared scooters that are indicative of different life stages and profiles.

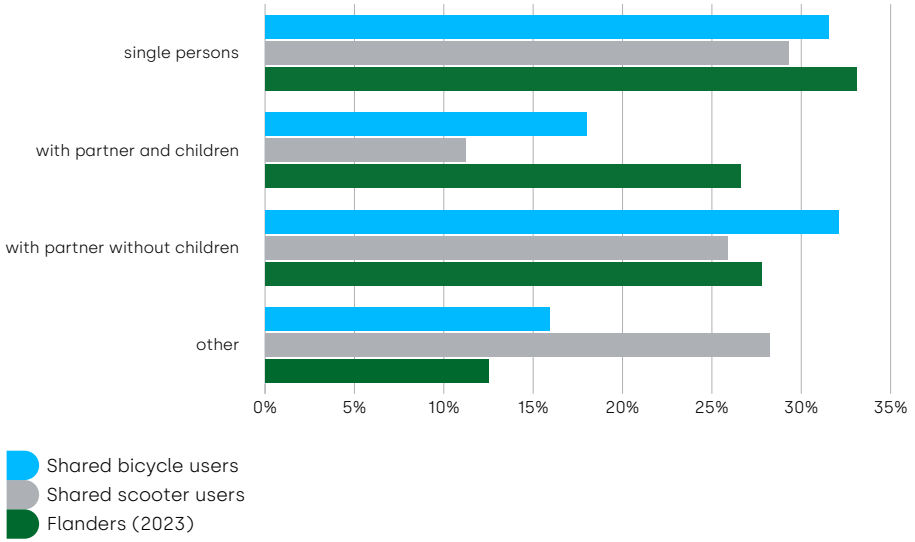
Shared bicycle users: small households
Almost 30% of shared bicycle users live alone and 36% live in a two-person household, meaning that two-thirds of users live in households with a maximum of two people. These figures are reflected in family composition: 32% live with a partner without children and 27% are single without children. Only 18% reside with a partner and children living at home. Medium-sized households (3 or 4 persons) account for 12% and 13% of this group respectively, while only 6.9% are members of households with five or more persons. The profile of shared bicycle users therefore shows a certain stability, with a dominant presence of adults who live alone or in small family units. The proportion of students and young adults still living with their parents is relatively modest (8.3%).

Shared scooter users: a younger profile with slightly larger households

Shared scooter users exhibit a different pattern that indicates a younger profile. Like shared bicycle users, 29% live alone, but the proportion of larger households is higher. For example, 10.5% of shared scooter users live in a household of five or more people, compared with only 6.9% of shared bicycle users. The proportion of medium-sized households (3 – 4 persons) is also slightly higher among shared scooter users. Family composition confirms this younger profile: only 26% live with a partner without children and 11% with a partner and children living at home – significantly lower than among shared bicycle users. 16.5% of shared scooter users live with their parents, grandparents or carers, which is twice as high as among shared bicycle users. The proportion living in student accommodation or shared housing is also higher (8.4%, compared with 5.4% among shared bicycle users).

We compared the family composition of respondents with that of the general population of Flanders. Users of micro-mobility (and especially shared scooters) have fewer children than the average Flemish person and are more likely to live in different family structures. The statistics on Flemish families do not distinguish between single persons with and without children. Single persons with and without children among micromobility users have therefore been combined for this graphic.

A comparison of the family composition of micromobility users and Flemish families. The data for Flemish households were collected by Statistiek Vlaanderen.



EDUCATION

The educational level of micromobility users is high on average, but there are noticeable differences between users of shared bicycles and users of shared scooters.

Shared bicycles have a high average level of education. For example, 45% have a master's degree and 23% have a professional bachelor's degree. Only 16% have secondary education as their highest level of education and the proportion with only primary education is extremely low (0.6%). These figures indicate a strong academic profile among shared bicycle users, with more than three in four respondents having a higher education qualification.

The education level among users of shared scooters is also relatively high, but less pronounced than among users of shared bicycles: 37% have a master's degree and 19% have a professional bachelor's degree. At the same time, the proportion with only secondary education is higher (23%) and almost 4% have only completed primary education. Shared scooter users therefore constitute a slightly less educated group, which may be explained by previous findings regarding their age profile and living conditions. On average, shared scooter users are younger.

EMPLOYMENT

The majority of micromobility users are active in the labour market. However, there are again clear differences between users of shared bicycles and users of shared scooters, especially in the proportion of students and full-time workers. These differences are consistent with previous findings regarding age and educational profiles.

Of users of shared bicycles, 66% work full-time, While 10% work part-time and 10% are students. Other situations are limited: 6.9% are retired, 2.4% are job-seekers and 0.9% are unfit for work. These figures indicate a predominantly working population, with a small proportion of students and older people, typical of urban users in stable professional circumstances.

The profile of shared scooter users differs in a number of ways. Although a majority (63%) also work full-time, this proportion is slightly lower than among shared bicycle users. Most striking is the higher proportion of students (18.5%), almost twice as high as among shared bicycle users. The proportion of retired people (4%) and part-time workers (7%) is also slightly lower. The proportion of job-seekers (3.2%) or people unfit for work (1.1%) remains low.

POSSESSION OF A DRIVING LICENCE

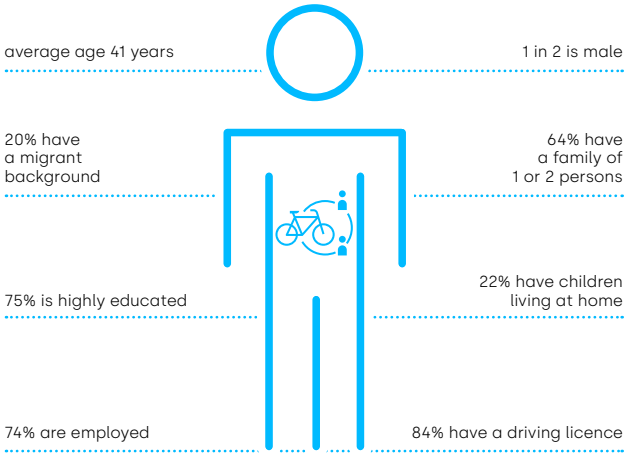
The majority of respondents in the survey hold a driving licence.

Almost 86% of shared bicycle users are driving licence holders. This suggests that most users of shared bicycles also have access to motorised transport but deliberately choose bicycles as an alternative or additional means of transport.

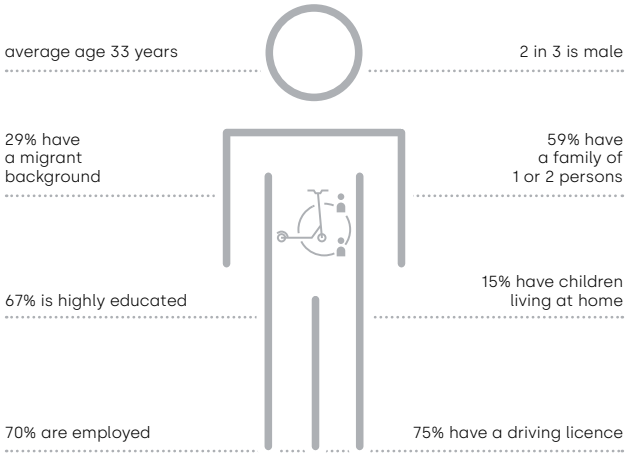
Among users of shared scooters, the proportion of licence holders is significantly lower (75%). These figures confirm the younger profile of shared scooter users, as reflected in previous data on age, family and educational background.

On average, shared scooter users are younger than shared bicycle users. Among shared scooter users, men are also more represented than women.

Bicycle sharer profile



Scooter sharer profile



4 —

THE IMPACT OF SHARED BICYCLES AND SCOOTERS

4.1
HOW OFTEN RESPONDENTS USE MICROMOBILITY, AND HOW OFTEN IN COMBINATION WITH PUBLIC TRANSPORT

BICYCLE AND SCOOTER SHARERS ARE MAJOR USERS OF SHARED MOBILITY

People who use shared bicycles or scooters tend to do so frequently. To obtain a clear picture of the use of micromobility, we considered the use of shared bicycles and shared scooters over the past twelve months. 92% of respondents reported using a shared bicycle at least once during that period. 21% had used a shared scooter at least once. We also asked these users about their frequency of use over the past three months. This revealed that 62% had used a shared bicycle weekly and 51% had used a shared scooter weekly.

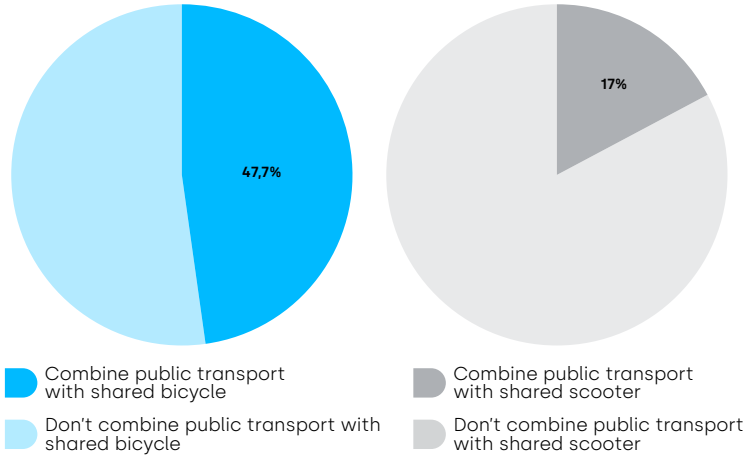
One in four users of shared bicycles and shared scooters also occasionally uses a shared car. They use both free-floating and round-trip systems. The most popular car share systems in this group are Poppy (57%) and cambio (48%). This confirms that shared mobility forms an integrated whole: car sharing, bicycle sharing and scooter sharing complement each other seamlessly.

MICROMOBILITY AND PUBLIC TRANSPORT: A PERFECT COMBINATION

Shared bicycles and shared scooters are an excellent last-mile solution after using public transport. If you take the train, tram or bus, you can often transfer seamlessly to micromobility afterwards. Our research shows that this combination is particularly potent: almost half the respondents who use public transport daily or weekly always or usually combine it with bicycle sharing. Shared scooters are also almost always used in combination with public transport by more than one in six frequent public transport users.

For 8% of respondents, the availability of shared bicycles and scooters is even a prerequisite for using public transport. Without that last link, they would forgo travelling by train or bus. In addition, 22% report that they would sometimes choose a different mode of transport in the absence of micromobility. These figures clearly show that micromobility reinforces and supports the use of public transport. Together, they form a complementary mobility system.

Percentage of respondents who use public transport weekly and **combine it with micromobility**



4.2 WHY DO RESPONDENTS USE A SHARED BICYCLE OR SCOOTER?

SHARED BICYCLES AND SCOOTERS ARE PRIMARILY USED FOR LEISURE TRIPS

72% of respondents who used a shared bicycle in the past three months did so for activities such as going to the cinema, a museum or a restaurant. Just over half also use shared bicycles for home-work travel, while almost as many respondents use them to visit friends or family. In addition, 43% report that they use shared bicycles for hobby-related trips.

Users of shared scooters also do so primarily for journeys involving leisure, work, social contacts and hobbies, though these figures are less marked than for shared bicycles. For instance, only 46% of respondents use a shared scooter for leisure journeys. Use is also lower for home-work travel: 43% of shared scooter users do so for commuting. Visiting friends or family (42%) and travelling to hobby activities (also 42%) follow closely behind and are in line with the pattern of use for shared bicycles.

Journey type	Percentage by shared bicycle	Percentage by shared scooter
Leisure activities (e.g. cinema, bar, eating out, shopping, museum visits, etc.).	72 %	46 %
Commuter travel	51 %	43 %
Visiting friends/family	47 %	42 %
Hobbies (sports, courses, etc.)	43%	42 %

WHY DO PEOPLE CHOOSE A SHARED BICYCLE?

Respondents were able to give up to five reasons for using a shared bicycle and to indicate how important each reason was in their choice. The responses show that there is no single dominant motivation: the use of shared bicycles is determined by a combination of factors, the importance of which varies per user.

The **five most frequently selected reasons for choosing a shared bike** are:

- to prevent theft or vandalism of their own bicycle (54%)
- for spontaneous reasons, such as not wanting to walk (52%)
- as an alternative when public transport is inadequate (44%)
- because it is more flexible than using your own bicycle (41%)
- to save time (38%)

However, these reasons are not necessarily critical for users. When we look at their importance, other motives emerge as decisive. **The decisive factors for using a shared bicycle are:**

- getting home quickly and safely when public transport is no longer running (82% say this is important or very important)
- the absence of a personal bicycle, moped or scooter due to theft (79%)
- the sustainable, environmentally friend nature of shared bicycles (77%)
- the absence of public transport to the destination (78%)
- the greater flexibility compared with an own vehicle (72%)
- the ease of use of shared electric bicycles (71%)
- avoiding congestion or crowds on public transport (70%)
- or just the option of using a shared bicycle in combination with public transport (70%).

The reasons for using a shared bicycle vary greatly, in terms of both frequency and importance. Some reasons are rarely mentioned, but turn out to be decisive when they arise. Other reasons are mentioned frequently, but appear to carry less weight in the final decision.

A good example is the loss of one's own bicycle, moped or scooter due to theft: only 2% of respondents cite this as a reason, but for that group it is a powerful determining factor. Conversely, 52% cite the spontaneous use of shared bicycles as a reason (e.g. not feeling like walking), but only half consider this motive to be important or very important.

When we look at **reasons that are both frequently mentioned and considered important or very important,** we see a **clear link with public transport and private means of transport.** Hence shared bicycles are often used:

- as an alternative when public transport is inadequate, e.g. in the evenings or in remote locations
- to supplement public transport, for example, as a first or last-mile solution
- to avoid crowds or delays on public transport

In addition, factors relating to own means of transport also play a role. For instance, people sometimes find their own bicycle or scooter less flexible or less comfortable, or they do not want to risk its theft.

These findings show that the decision to use a shared bicycle is often based on a combination of contextual, practical and emotional factors.

Frequently chosen and important reasons for users of **shared bicycles**

Reason for using a shared bicycle	Percentage of users choosing a shared bicycle as a consequence	Percentage of users for whom this reason is important or very important
Preventing theft or vandalism of own bicycle	54%	76%
Spontaneity (e.g. to avoid having to walk)	52%	52%
Inadequacy of public transport (poor connection or too infrequent during off-peak hours)	44%	66%
Saving time	38%	76%
Getting home quickly and safely when public transport is not running	34%	82%
As a sustainable, environmentally friendly alternative	30%	77%

THE REASONS FOR USING SHARED SCOOTERS ARE SIMILAR TO THOSE FOR SHARED BICYCLES

Spontaneity, time savings, greater flexibility than a private scooter or bicycle, and avoiding theft or vandalism to your own vehicle are frequently cited reasons. As with bicycle sharing, integration with public transport also plays an important role — for example, when connections are lacking, to avoid congestion or to get home quickly and safely in the evening when public transport is no longer running.

Here again, there is no single dominant reason. The decision to use a shared scooter is usually determined by a combination of practical, financial and contextual considerations. Some reasons are mentioned by only a limited number of users, but appear to be important to those who do mention them. For example, the following reasons are very important:

- a shared scooter is safer than your own scooter (71% — although less than 1% spontaneously mention this as a reason for choosing a shared scooter).
- using a shared scooter is cheaper than buying your own scooter (68%)
- the use of a shared scooter as a first or last-mile solution (56%)

Frequently chosen and important reasons for users of **shared scooters**

Reason for using a shared scooter	Percentage of users mentioning this reason	Percentage of users for whom this reason is important or very important
Spontaneity (e.g. to avoid having to walk)	46%	42%
Saving time	41%	72%
Inadequacy of public transport (poor connection or too infrequent during off-peak hours)	34%	61%
Getting home quickly and safely when public transport is not running	25%	82%
Flexibility compared with own bicycle or scooter	21%	63%
Preventing theft or vandalism of own bicycle or scooter	17%	65%

CONCLUSION

Often, a combination of reasons come into play, and how important users consider these reasons to be also varies. One striking example is the ease with which a shared vehicle can be used spontaneously. Around half the respondents cite this as a reason for opting for a shared bicycle or shared scooter. But this reason is seldom seen as very important.

This suggests that a significant proportion of shared mobility journeys are made for convenience or for impromptu reasons — for example, because it is quicker than walking. At the same time, it also shows that other, more structural reasons often carry more weight: for example, the inadequacy of public transport or advantages over an own vehicle, such as avoiding theft or the greater flexibility of shared mobility.

Shared scooters and bicycles are therefore not only convenient for those who need a quick solution, but also form a conscious and necessary link in the mobility mix of many users.

Users opt for shared bicycles or scooters when public transport connections are lacking, to avoid crowds, or to get home quickly in the evening when public transport is no longer running

4.3 MODAL SPLIT AMONG USERS OF SHARED BICYCLES AND SHARED SCOOTERS

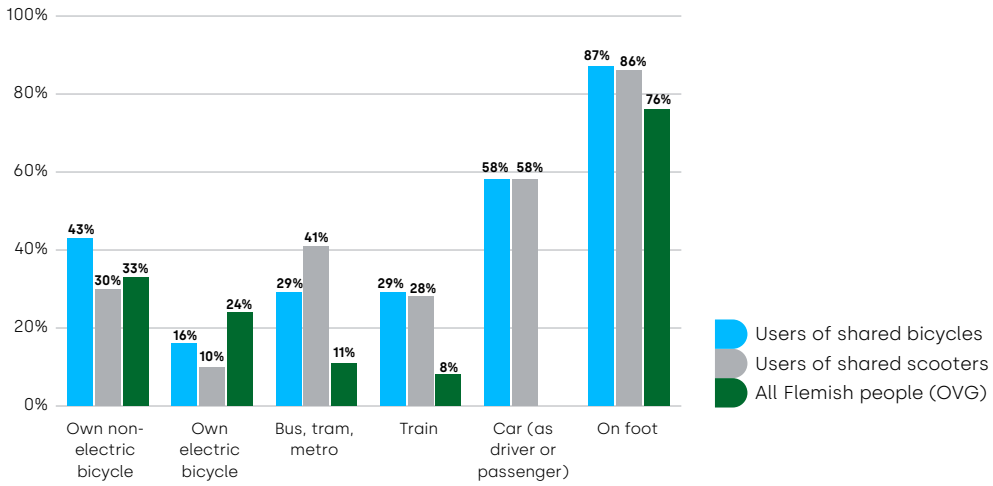
What transport modes do users of micromobility use to get around? We compared the travel behaviour of our respondents with that of the general population of Flanders. The reference data on the travel behaviour of Flemish residents are taken from the travel behaviour survey (Onderzoek Verplaatsingsgedrag – OVG) conducted by the Flemish government.

As can be seen in the figure below, users of micromobility travel more sustainably than the average resident of Flanders. Users of shared bicycles and shared scooters choose to travel weekly by train (29%) and bus/tram/metro (31%) almost three times as often as the average person in Flanders (8% and 11% respectively). Bicycle use is also higher: 41% of respondents cycle weekly, compared with 33% of all Flemish people. However, the proportion of Flemish people who use a private electric bicycle every week is higher (24%) than among users of micromobility (16%). Finally, micromobility users are more likely to walk every week (87%), compared with 76% of the general Flemish population.

There are clear differences in travel behaviour between shared bicycle and shared scooter users. For example, 43% of shared bicycle users use their own bicycle every week, compared with only 30% of shared scooter users. Conversely, a significantly larger proportion of shared scooter users (41%) use buses, trams or the metro every week, compared with 29% of shared bicycle users.

As our survey assessed car usage in general (as a driver and/or passenger), we cannot directly compare it with the figures for the Flemish population. However, the Flemish Travel Behaviour Survey (Vlaams Onderzoek Verplaatsingsgedrag) shows that 60% of Flemish people drive a car every week. This suggests that shared bicycle and shared scooter users are less likely to choose the car.

Modal split: weekly use of modes among users of shared bicycles and shared scooters and among all Flemish people



Users of shared bicycles and scooters travel more sustainably than the average Flemish person

4.4
MODAL SHIFT

HOW HAS MICROMOBILITY CHANGED RESPONDENTS' TRAVEL BEHAVIOUR?

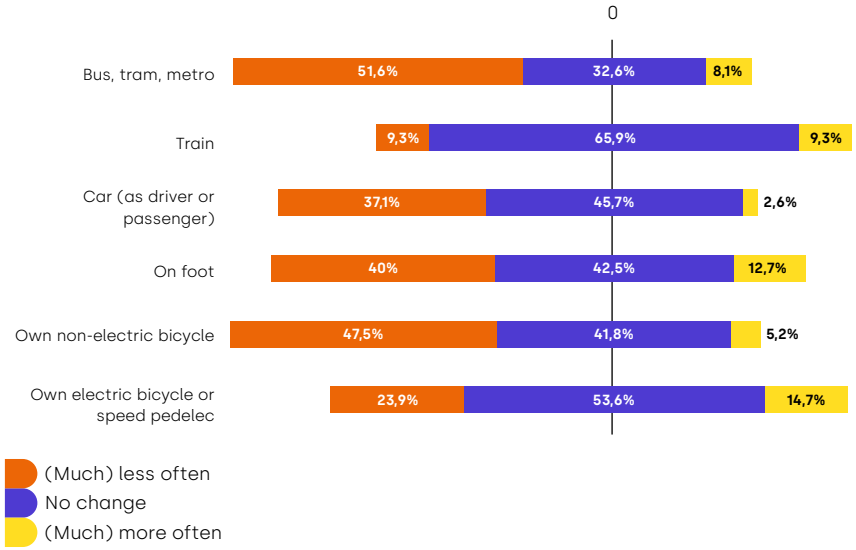
Micromobility affects almost all modes of transport. In general, travel on foot, by car, by private (electric) bicycle and by public transport is decreasing. As Section 4.2 has already made clear, the choice of shared bicycles and scooters is often influenced by considerations relating to personal means of transport or public transport. It is therefore not surprising that journeys made using these modes are declining. At the same time, it appears that as many as 37% of users are travelling less by car, and sometimes much less. Micromobility therefore also leads to a reduction in car use.

The change in travel behaviour also suggests a change in vehicle ownership (see Section 4.6). Although journeys made by own bicycle are declining, users still cycle more often than the average Flemish person (see Section 6.3) and 62% use a shared bicycle every week (see Section 4.1).
The decline in journeys made by private bicycle is probably indicative of a shift from private bicycle ownership to bicycle sharing.

Bicycle and scooter sharing partially replaces other forms of active mobility, but also a significant number of car journeys. In this way, micromobility forms an integral part of the sustainable mobility mix. However, it remains important to steer this shift as much as possible in the direction of active mobility. We must also pay close attention to inclusion: not everyone can ride a bicycle, for example.

Shared bicycles and scooters partly replace other forms of active mobility, but also a significant number of car journeys

Modal shift in users of micromobility



WHAT MODES OF TRANSPORT WOULD RESPONDENTS USE IF THERE WERE NO SHARED BICYCLES AND/OR SCOOTERS?

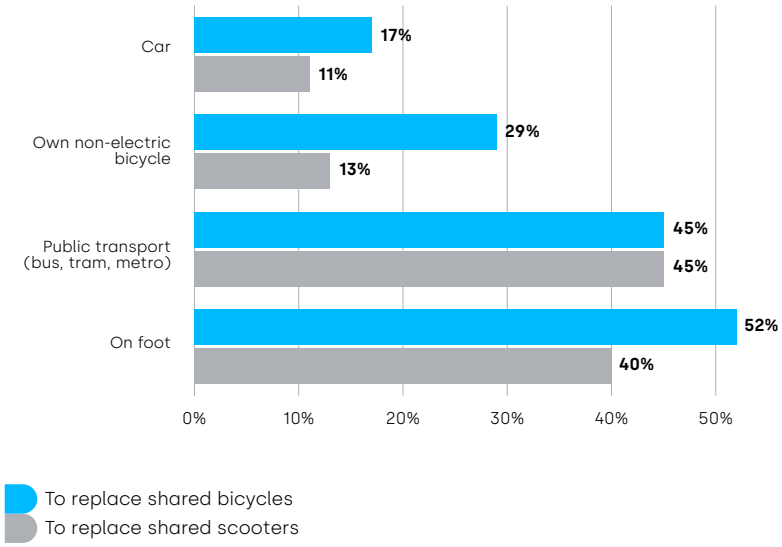
We asked respondents to think back to their journeys over the past three months. How would they have moved around if there had been no micromobility options? Of those who use shared bicycles, 17% would have taken the car at least once as an alternative, compared with 11% of those who use shared scooters.

The share is similar for public transport: 45% of both bicycle-sharers and scooter-sharers would have opted for the bus, tram or metro at least once. In the absence of shared bicycles, 29% would have used their own bicycle at least once and 52% would have walked at least once.

Among shared scooter users, 13% would have opted for a normal bicycle at least once, and 40% would have gone on foot at least once.

These figures demonstrate that shared mobility has a real impact on travel behaviour and that its disappearance often leads to a return to active or collective modes of transport, with or without an increase in car use.

Proportion of respondents who would have opted to replace shared bicycles or scooters **with another vehicle at least once**



Micromobility versus public transport?

Sections 4.1, 4.2 and 4.3 show that micromobility and public transport are two sides of the same coin. Micromobility is seen as more flexible, faster and less congested, and is a good solution at times or in places where public transport is absent or when public transpor is overloaded. Logically, therefore, opting to use a shared bicycle or scooter in some cases results in a decrease in the use of public transport. Nevertheless, respondents still use public transport more frequently than the average resident of Flanders (see Section 4.3) and often do so when micromobility is lacking.

The same applies to journeys on foot: people often spontaneously opt for a shared bicycle or scooter (see Section 4.2) because they do not want to walk. Without micromobility options, these users often revert to walking.

4.5 VEHICLE OWNERSHIP AND SEASON TICKETS

Users of micromobility clearly stand out from the average Flemish person, mainly because they are less likely to own private vehicles. For example, 43% of micromobility users do not own a car – more than double the Flemish average (18.8%). This figure is higher among shared scooter users (52%) than among shared bicycle users (41%).

Ownership of conventional bicycles is also lower. Only 65% of users have their own bicycle, compared with 80% of households in Flanders. Once again, the difference is greatest among shared scooter users (52%), compared with 67% among users of shared bicycles. The difference is even more striking for electric bicycles: only 21% of micromobility users own one, compared with 44% of the general population in Flanders. Among shared scooter users, this figure is only 15%, while among bicycle-sharers it stands at 22%.

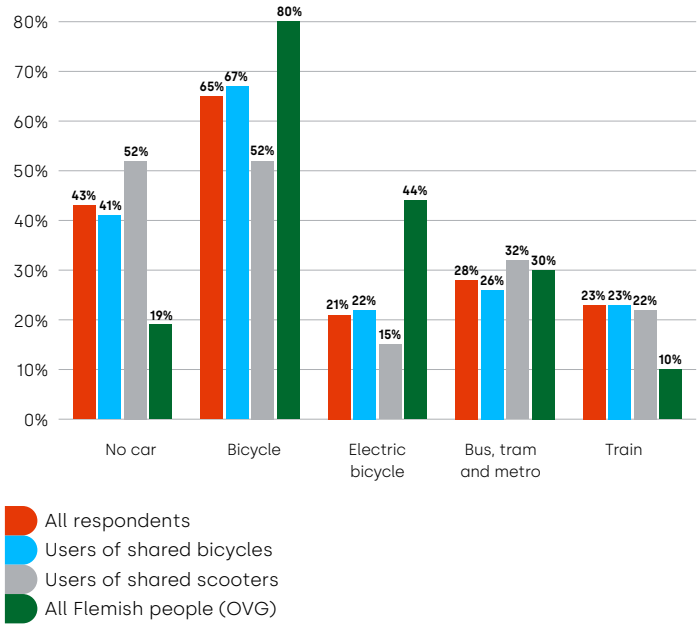
These figures suggest that shared bicycles and scooters are an alternative to vehicle ownership for many people, enabling them to be mobile without owning a car or bicycle themselves.

The picture is mixed when it comes to public transport season tickets. 28% of micromobility users have a bus, tram or metro season ticket, slightly below the Flemish average of 30%. The percentage is higher among shared scooter users (32%) than among shared bicycle users (26%). This is striking, given that micromobility users use public transport almost three times more often than the average Flemish person, as previously shown. So they are slightly less likely to have a season ticket, but use public transport more intensively than average in Flanders.

For train season tickets, the difference is what might be expected: 23% of micromobility users have a train season ticket, compared with only 10% of the Flemish population. This figure is similar for both shared scooter users (22%) and shared bicycle users (23%).

In summary, these figures show that micromobility users differ significantly from the average Flemish person in terms of vehicle ownership. The relatively high proportion of people without cars and the limited ownership of bicycles highlight the important role that shared mobility plays in a sustainable modal shift.

Vehicle ownership among users of micromobility compared to the Flemish average. The Flemish reference data are taken from the travel behaviour survey (Onderzoek Verplaatsingsgedrag)



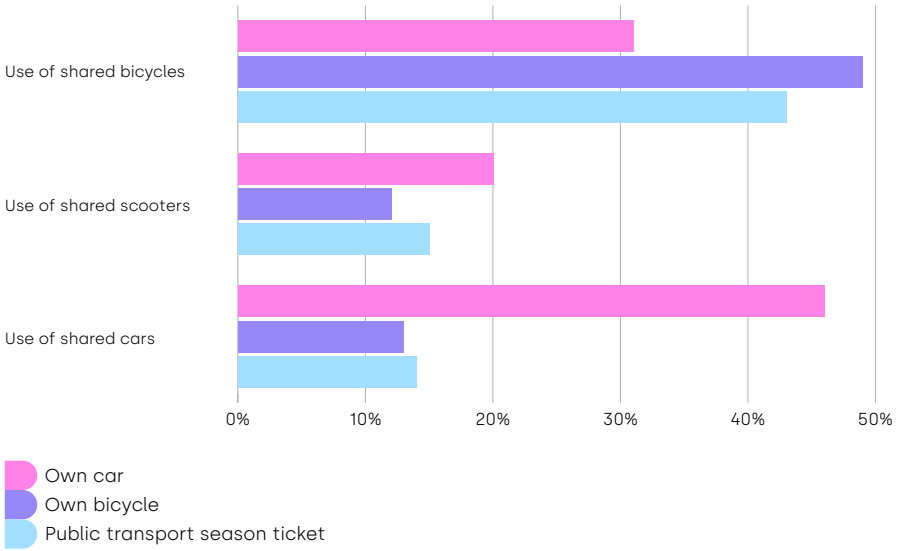
4.6 IMPACT OF SHARED MOBILITY ON VEHICLE OWNERSHIP

In this section, we discuss the impact of shared mobility on vehicle ownership. This means we will not only be looking at micromobility, but also car sharing.

For a significant group of users, the use of shared mobility has led to tangible changes in vehicle ownership. In the twelve months prior to the survey, 6% of respondents said they had disposed of their own car, partly under the influence of shared mobility. In addition, 7% had cancelled their public transport season tickets and 5% had given up their own bicycles.

All forms of shared mobility encourage people to get rid of their cars or bicycles or cancel their public transport season tickets

The importance of shared mobility in disposing of a private vehicle, broken down by different user types.



The use of shared cars plays a pivotal role in disposing of a car: 46% of respondents who had given up their cars said that car sharing played an important or very important role in this decision. This is consistent with the conclusions of our 2022 Car sharing Impact report. Other forms of shared mobility also played their part in this decision, though to a lesser extent: 31% said bicycle-sharing was (very) important, and 20% said the same of scooter-sharing.

The use of shared bicycles appears to be the main factor for people cancelling their public transport season tickets: 43% of respondents who cancelled season tickets cited bicycle-sharing as an important reason. Shared scooters (15%) and shared cars (14%) are mentioned significantly less often in this context.

Bicycle-sharing also plays a pivotal role in deciding to dispose of an own bicycle. No fewer than 49% of respondents who had given up their own bicycles said that bicycle-sharing had an important or very important impact. Car-sharing (13%) and shared scooters (12%) had a much more limited influence on that decision.

These figures show that micromobility not only replaces driving, but can also fundamentally influence existing mobility habits and ownership patterns. Shared bicycles in particular appear to be more than just a practical transport solution: for some users, they lead to the cancellation of season tickets and a reduction in the number of privately owned vehicles, such as cars or bicycles. Shared mobility therefore does not just supplement other modes of transport, but actually replaces traditional forms of mobility ownership.

5 —

GLOSSARY

- **Micromobility:**
  refers in this report to shared bicycles and shared scooters

- **Shared mobility:**
  by this we mean all forms of shared mobility taken together: car sharing, shared bicycles and shared scooters.

- **Car sharing:**
  the alternating and systematic use of a car by different natural or legal persons at different times.

- **Shared bicycles:**
  the alternating and systematic use of a bicycle by different natural or legal persons at different times.

- **Shared scooters:**
  the alternating and systematic use of a scooter by different natural or legal persons at different times.

COLOPHON

Publisher responsible:
Way To Go, Koningin Astridlaan 185 bus 301, 9000 Gent

Support for research design, data collection and analysis:
Elnert Coenegrachts, researcher at the Department of Transport and Regional Economics at the University of Antwerp.

Content: Johannes Rodenbach, Bram Seeuws, Esther De Reys, Merel Vansevenant, Jeffrey Matthijs en Sarah Decombel

Design: Trien Pauwels, trien.org

Translation: Architekst

With thanks to: Bird, Donkey Republic, Dott, Hoppy, Lime, Monkey Donkey, Velo, Voi.

Copyright and re-use

Way To Go, September 2025

This publication was prepared with the support of the Flemish Government, the Interreg North Sea Region project ShareDiMobiHub and the Province of East Flanders.