TIER | dott

2024

Usage Report

Changing Mobility Habits

Change mobility for good, *together*

About this Report

As the responsible city partner, we offer a shared micromobility service that is **safe**, **useful**, and **sustainable**. To measure the "useful" aspect, we surveyed riders on how they use our service and how it has changed their mobility habits. In total, 8,468 riders in 23 cities across 10 countries completed our survey between September 25 and October 9, 2024.

This report compiles the findings of that survey, evaluating how our service has improved the accessibility, efficiency, and enjoyment of sustainable transport. Each of our **100 million rides** in 2024 has created positive change and helped our city partners progress towards their sustainable mobility goals. Our responsible approach also supports local development, benefitting our cities beyond the mobility sector.

Accessibility

Our service makes both micromobility and public transport more accessible for daily trips. As a result, residents have become less dependent on cars. 10% of riders even say they've postponed the purchase of a new car since starting to use our service. That means more travel on sustainable modes and less cars on our streets.

58%

of riders who previously traveled by car, taxi, or ride-hail say they have reduced such usage since starting to use TIER-Dott.

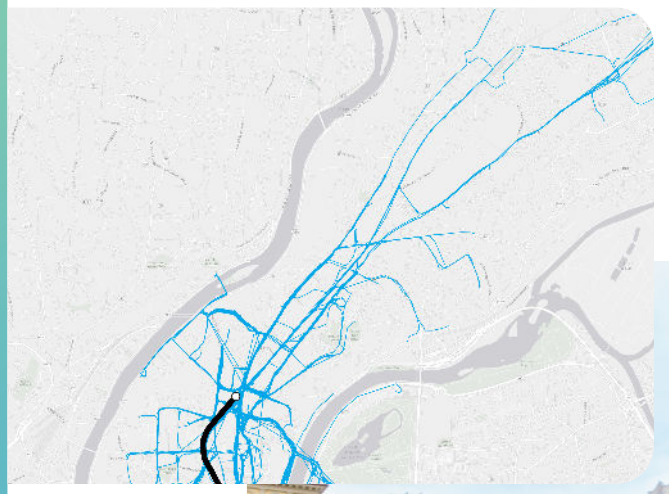
Amplifying public transport:

>6.5 million rides added to local transport

Expanded coverage

41% of our rides connect with public transport, and 16% of these transport trips would not have occurred without the first/last mile benefits of our service. In total, this means TIER-Dott added over 6.5 million rides to public transport systems in 2024, thanks to the added accessibility.

64% of riders use TIER-Dott in combination with public transport and 55% have a public transport subscription, demonstrating the high intermodality and shared ridership of the two services. To facilitate these intermodal connections further, we are integrated with over 40 MaaS applications and prioritize major transport hubs for vehicle deployment and rebalancing.



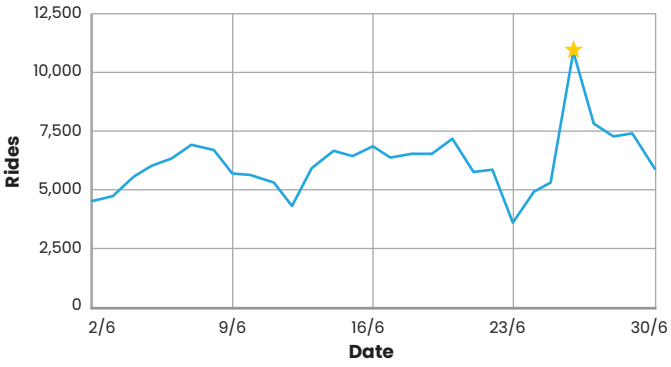
← Rides starting or ending at Cuire Station, the end of metro line C in Lyon, France

Complementary service

Where public transport is not available, our service fills these gaps. 36% of riders use TIER-Dott to reach places not served by public transport. While most transport services are limited overnight, our service is available 24/7, where local regulation allows. 32% of women riders say they use TIER-Dott to get home safely at night. We therefore provide a crucial connection for night-shift workers and vulnerable communities who may not feel safe using other modes at night.

Filling these service gaps also provides resilience and adaptability for the public transport network. During a transport strike in Milan in June 2024, our daily ridership increased by 65% over the week prior, demonstrating how commuters turn to our bikes and scooters in the event of a disruption. We also supplement public transport service during special events, such as the Paris 2024 Olympics and Paralympics, when we transported over 1 million spectators, reducing strain on the metro system.

Milan Ridership, June 2024:



Milan ridership in June 2024, with the date of a transport strike marked with a star→

Facilitating micromobility uptake:

31% of TIER-Dott bike riders cycle more often

18% of riders, and 31% who primarily use our e-bikes, cycle more often since starting to use TIER-Dott. That's about 1.8 million individuals cycling more in cities across Europe. Our investments in accessibility have therefore resulted in greater micromobility uptake in our cities.

Our Dott Flex and Pro passes offer rides for as low as 1.25€/ride, making regular micromobility use more affordable. These low fares also allow individuals who may not be able to afford purchasing and maintaining their own bike or scooter to try these modes in the first place.

Our multimodal fleet also attracts a wider audience to micromobility. In multimodal markets, 67% of riders say they use only or mostly e-scooters. This preference for e-scooters suggests bikes alone would not attract as many riders to micromobility. Offering e-bikes is then beneficial for attracting demographics that may not feel comfortable on e-scooters, as 17% of riders over 55 and 16% of women riders primarily use e-bikes, vs. 10% of all riders in multimodal markets. Ultimately, a mixed fleet gives riders the freedom to choose the mode that best suits each trip, as 23% of riders in multimodal markets regularly use both e-bikes and e-scooters.

Efficiency

Our service reduces travel times across the city, both by offering a more direct, reliable travel option and by reducing congestion through the replacement of car travel. This improves the efficiency of the mobility system as a whole, allowing traffic to move more smoothly and individuals to get where they're going faster.

Saving riders time:

74% of riders choose TIER-Dott to save time

We offer a direct, door-to-door connection between locations that may not be conveniently connected by public transport due to multiple changes or limited service, and is not impacted by traffic congestion. Travel time on an e-bike or e-scooter is also largely consistent throughout the day, and from one day to the next, allowing riders to easily plan their trips without worrying about delays.
At TIER-Dott, we make travel planning even easier by integrating in over 40 MaaS applications.

When asked why riders choose shared micromobility over other modes, the top 3 answers were:

74% to save time

41% makes their trips easier

41% to avoid traffic

Reducing congestion:

40.5 million km of car travel replaced

21% of TIER-Dott rides directly replace polluting modes (car, moped/motorcycle, taxi/ride-hail). By replacing an estimated 40.5 million kilometers of car travel in 2024, this equates to over €17 million in external societal costs avoided from reduced congestion, based on data from the European Commission.[1]

With more commuters on bikes and scooters, we also reduce the crowding on public transport networks at peak periods. This, in turn, makes public transport a more attractive option for car drivers, inspiring a positive mode shift cycle.

1. European Commission: Directorate-General for Mobility and Transport, Essen, H., Fiorello, D., El Beyrouty, K., Bieler, C. et al., Handbook on the external costs of transport – Version 2019 – 1.1, Publications Office, 2020, https://data.europa.eu/doi/10.2832/51388

Enjoyment

With an enjoyable outdoor travel experience, we provide proven mental and physical health benefits for riders. We also provide environmental and health benefits for the city as a whole by reducing emissions and air pollution from car travel. Overall, our service contributes to a happier and healthier population.

Benefiting rider health:

29% of riders feel happier

29% of riders choose TIER-Dott over other modes because they feel happier and more relaxed while traveling. Professional studies have similarly shown e-scooter riders report improved mental wellbeing and reduced feelings of stress after riding[2]. Studies have also shown using an e-bike improves physical fitness and health, just like pedal bikes.[3,4]

Improving city health:

>4,000 tonnes of CO_2 emissions avoided

21% of TIER-Dott rides directly replace polluting modes (car, moped/motorcycle, taxi/ride-hail), totaling 40.5 million km of car travel replaced in 2024. This equates to over 4,000 tonnes of CO_2 avoided, based on data from the European Environment Agency.[5] Reduced car travel also reduces harmful air pollution from particulate matter, resulting in respiratory health benefits for the city.[6]

2. Grant-Muller, S., Yang, Y., Panter, J. & Woodcock, J., (2023) "Does the Use of E-Scooters Bring Well-Being Outcomes for the User?: A Study Based on UK Shared E-Scooter Trials", Active Travel Studies 3(1). https://doi.org/10.16997/ats.1298 **3.** Riiser A, Bere E, Andersen LB and Nordengen S (2022) E-cycling and health benefits: A systematic literature review with meta-analyses. Front. Sports Act. Living 4:1031004. doi: 10.3389/fspor.2022.1031004 **4.**Bourne, J.E., Sauchelli, S., Perry, R. et al. Health benefits of electrically-assisted cycling: a systematic review. Int J Behav Nutr Phys Act 15, 116 (2018). https://doi.org/10.1186/s12966-018-0751-8 **5.** https://www.eea.europa.eu/en/analysis/indicators/co2-performance-of-new-passenger **6.** Grabow, M.L.; Spak, S.N.; Holloway, T.; Stone, B.; Mednick, A.C.; Patz, J.A. Air Quality and Exercise-Related Health Benefits from Reduced Car Travel in the Midwestern United States. Environ. Health Perspect. 2012, 120, 68–76. https://doi.org/10.1289/ehp.1103440

Conclusion

Going Beyond: Local Development

Beyond the mobility sector, TIER-Dott's responsible approach provides added benefits for our city partners. We directly employ over 1,900 people through local, high-quality jobs in our cities. By setting up local operational centers and hiring teams locally, we create jobs, invest in the local economy, and ensure our workforce reflects the fabric of our cities. We also regularly share data and insights on the usage of our service with our city partners. This informs mobility planning and infrastructure investments, further improving the mobility network for all users.

Looking to 2025, we are excited to continue working with our city partners to create a service that is useful for everyone. We are committed to accelerating positive change in our cities through mobility, and beyond.

To read more about how we measure and manage all of our impacts in cities, read our most recent **Sustainability Report**, available on our website. The 2024 edition will be published later this year.

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