

FREENOW ✓  
The Mobility Super App

# MOBILITY AS A SERVICE REPORT 2023

FREE NOW FEEL FREE NOW **FEEL FREE NOW** FEEL FREE NOW FEEL FREE N

FEBRUARY 2023

# YEAR IN REVIEW

In 2022, FREE NOW accomplished strong progress in many core areas. The number of vehicles available via FREE NOW increased by almost two-thirds.

The number of trips increased by over 50 percent.

## KEY TAKEAWAYS:



**10** Active Countries

**170+** Active Cities

Integration of Public Transport



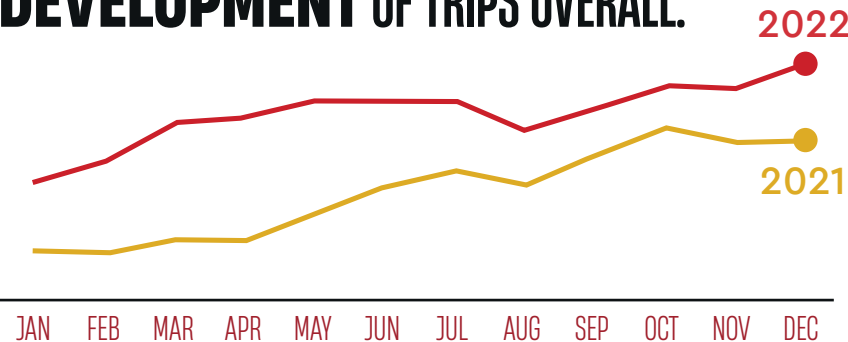
## TOP 6 CITIES BY NO OF TRIPS:



## APPS AND PASSENGERS:



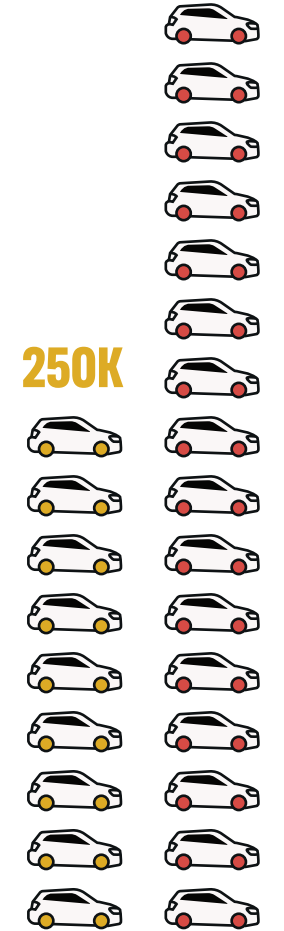
## DEVELOPMENT OF TRIPS OVERALL:



## VEHICLES ON PLATFORM:

**430K**

**250K**



2021 2022

# MAKING A CASE

## For Change in the UK



### STEPHEN JOSEPH OBE

Professor, University of Hertfordshire  
Smart Mobility Unit and chair of  
"Smart Transport"

The case for changing the way the UK gets around is clear. Government figures show that now car use has bounced back after the Covid lockdowns, there is increasing congestion, especially in cities and market towns\*. **Pollution from motor vehicles is linked to a range of health problems**, including asthma, cancer and dementia, and it is also one of the main contributors to carbon emissions.

**Cars feel convenient, but the way we use them wastes space.** The average car is parked 23 hours a day, and when they do move they go quite short distances (60% of car journeys are under 5 miles\*\*) and often have only one person in them. Surveys suggest that with cost of living pressures many people are prepared to change the way they travel, but they need to be given some good alternatives to single-occupancy car use.

Better and more affordable public transport has to be part of this – there should be long term funding for buses, trams and trains, and simple, integrated smart ticketing to knit them together. Increased walking and cycling is also vital. But new forms of shared mobility also have a role. **E-bikes, e-cargo bikes, e-scooters, car clubs, on-demand buses, taxis and shared cars can all give people new and affordable travel choices.** However, all of these will need increased space on urban streets; lanes for buses and bikes and (regulated) e-scooters and increased parking controls. All of these need to be electrified, with charging points available for all modes, and need to be linked together through apps – FREE NOW is an example of the kinds of services cities will need in the future.

This isn't just about getting around more easily – it's about the way we want towns and cities to be. Less dominance by private cars means more space for people, green spaces, parklets and cafes, and breathable air. **Mobility apps like FREE NOW are part of the route to more liveable cities.**

\* Source: <https://www.gov.uk/government/statistics/provisional-road-traffic-estimates-great-britain-october-2021-to-september-2022/provisional-road-traffic-estimates-great-britain-october-2021-to-september-2022>

\*\* Source: <https://publications.parliament.uk/pa/cm201719/cmselect/cmtrans/1487/148705.htm>

# ASSESSMENT

## On Urban Change



**ADAM JĘDRZEJEWSKI**

Founder and CEO of Mobile City

The awareness of the **excessive scale of individual car-based motorisation** in urban areas and its negative impact on the quality of life is growing. Fortunately, not only among European cities that are leaders in sustainable mobility, but also in Poland or the Baltic States, for example. Spatial analysis shows that road and parking infrastructure alone can occupy even 35%-50% of the city territories. It takes up far too much of the shared space at a huge social, economic and environmental cost.

A remedy for this challenging situation may be seeking an **alternative to private motorisation**, namely multimodal shared mobility that supplements the public transport network. By using the sharing economy mechanism in the access to means of individual transport, we increase the efficiency of the entire transport system in cities. It turns out that the same mobility needs can be met either with fewer resources or in a new, different way, by changing transport habits to more sustainable ones.

In our\* opinion, the direction in which urban mobility ecosystems will further develop will fit into the **paradigm of "Mobility-as-a-Service" (MaaS)**, in which owning a private car is not needed for convenient traveling around the city and beyond. Digital MaaS platforms will become universal tools for optimal route planning by using the entire offering of transport services available in a given geographical area, regardless of whether they're provided by the public or the private sector. In the MaaS way we can relieve our cities and make them better places to live.

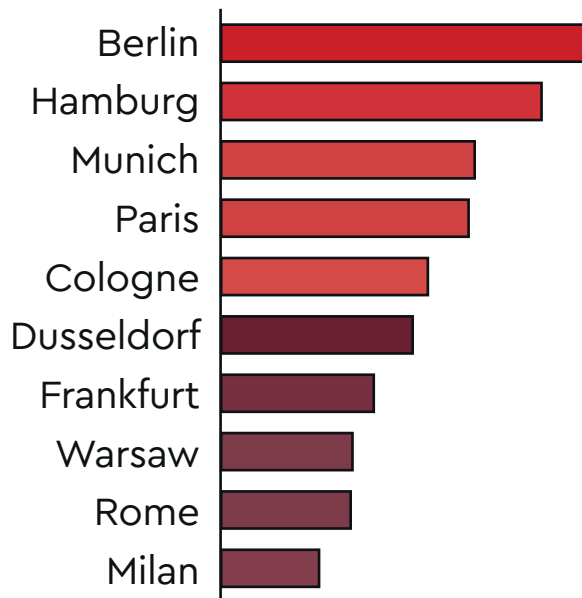


\* The Mobile City Association (pol. "Mobilne Miasto") is an independent Polish think-tank established in 2017 and promoting efficient, and eco-friendly urban mobility through fostering shared mobility systems.

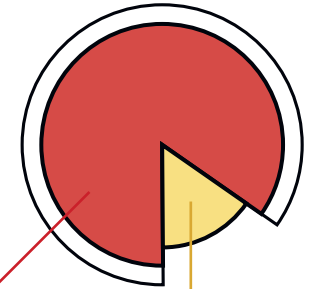
# URBAN CHANGE

## Shared Mobility

### CITIES WITH THE MOST MULTI-MOBILITY-TRIPS IN 2022:

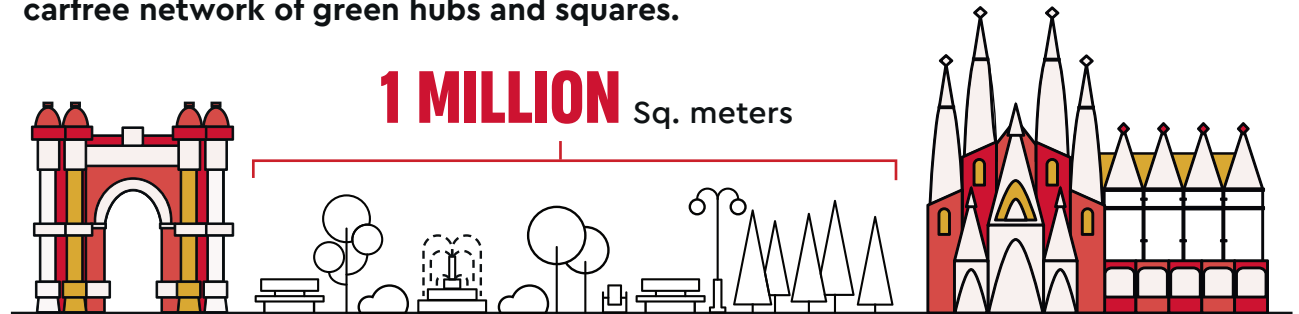


At FREE NOW, we believe that shared mobility is a big part of the solution: MaaS\* Super Apps enable citizens to choose modes of transport that fulfil the needs of the moment – without putting more vehicles on the street.



A **shared vehicle** is used up to six times more often than a **private car**, on average. In a purely shared mobility city, fewer than 10% of cars on the streets would actually be needed to get around. This would lead to reduced congestion, a one third decrease in CO2 emissions, and less competition for on-street parking – creating space that our communities could claim back. Mobility platforms therefore can make a big contribution to zero-emissions goals.

European cities are already taking their first steps in giving public spaces back to pedestrians. Recently in London, **the Strand Aldwych, in the historic heart of the city, was pedestrianised**, transforming one of the capital's most congested and polluted street into a welcoming, greener space with the size of a football field. And **Barcelona is set to transform one million square meters of road surface into a carfree network of green hubs and squares.**



According to a study by the BCNecologia Barcelona health institute, private car use could fall drastically from 1.19 million trips per week to 230,000. The reduced exhaust emissions would mean less noise and fewer heat islands. This move could prevent around 300 premature deaths per year.

\*Mobility as a Service (MaaS)

# URBAN CHANGE

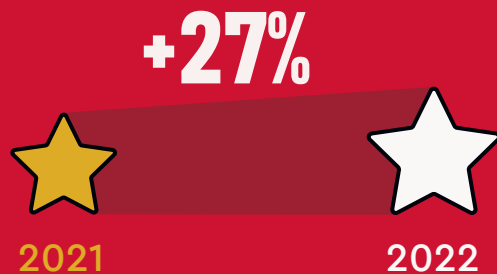
## Mobility Super App

### 14 MOBILITY PROVIDERS ACROSS EUROPE



### MULTI-MOBILITY USERS

using more than one vehicle type



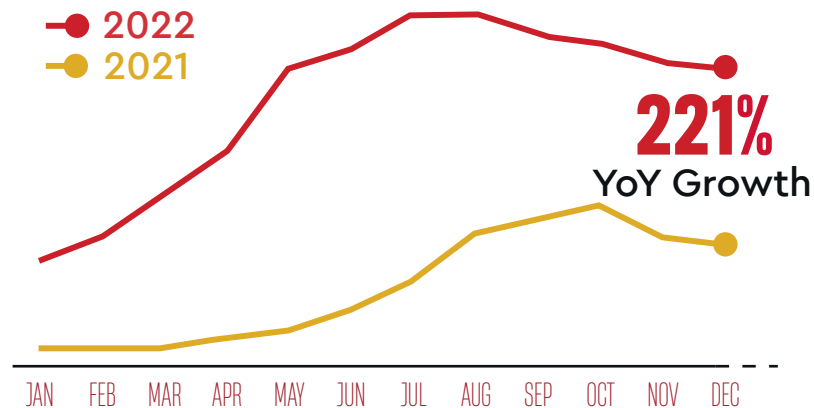
**60% of European citizens want one mobility app that integrates all mobility options, instead of individual apps for each transport mode – be it taxi, car sharing, eBikes or public transport.\*** The future is a fully integrated urban mobility ecosystem. Our user behaviour echoes this trend – currently half of all FREE NOW users already use more than one transport type in the FREE NOW app.

**66** Partnering with FREE NOW and integrating our multi-modal offer of eScooters and eBikes allows us to extend access to our services to a wider audience in several European markets, while offering users mobility solutions based on their actual needs. This is further proof of our shared citizen-centred vision. Only in this way a modal shift towards more sustainable means of transport will be encouraged.

Alexander Sprey  
Senior Market Development Manager at TIER

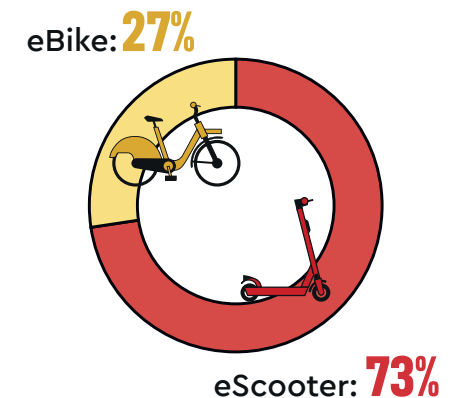
### DEVELOPMENT OF TRIPS

with eScooter, eBike, eMoped & Car Sharing



### TOURS DONE

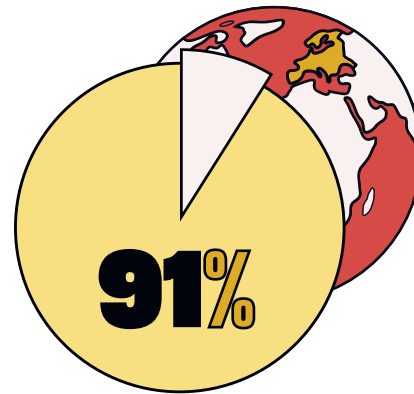
by different vehicle types



\*Source: FREE NOW multi mobility study, summer 2022

# ROAD TO ZERO EMISSION

Importance



Urban travellers have increased their expectations regarding sustainability. Companies must now have low to zero CO2 emissions, protect the environment and contribute towards improved urban space.

**91% of Europeans consider sustainable transport options more important or at the same level of importance as before the energy crisis.**

The European Union agreed to a ban on the sale of new petrol and diesel cars by 2035. Furthermore, the European Commission is expected to make a proposal in 2023 on the greening of corporate fleets. The UK is being even more ambitious with sales of new petrol and diesel cars being brought to an end by 2030.

Behavioral change is also a vital part of the puzzle. **In a recent survey\* every third person said they could imagine living without a private car and use shared sustainable transport instead in 2023.** Many companies are already looking into alternatives to the company car offering their employees a mobility budget that can be spend to their likings and needs.

The key to achieve this mobility revolution lies in combining mobility options and reframing what mobility is, moving from an ownership concept to a shared service that can be booked on demand.



\* FREE NOW surveyed 5,002 people living in cities in the UK, Germany, Austria, France, Spain, Portugal, Italy, Ireland, Poland and Greece. Kantar conducted the representative online survey in November 2022.

# ROAD TO ZERO EMISSION

## Goals

**Our purpose** is to empower smarter mobility decisions, helping people move freely, for cities to thrive. FREE NOW wants to make a significant contribution to a sustainable, efficient mobility world by promoting the shift to zero-emission transport methods - the company is already climate neutral since 2020. **The long-term goal is to achieve 100% zero emissions by 2030.**

## HOW ARE WE GOING TO ACHIEVE THIS AMBITIOUS GOAL?

Next to adding electric cars to our taxi and PHV fleet, we want to make more sustainable and shared transport options available in our app. In 2022, FREE NOW began to offer in-app public transportation tickets, meaning even more mobility options for users - without the need for any new cars on the streets.

**FREE NOW is currently partnered with electric car suppliers**, such as Citroën, Marshall, Otto Car and Peugeot as well as with Bonnet, BP Aral, BP Pulse, EDP, Electra, Shell and Wallbox Charging to boost the transition towards electric vehicles in this sector.

**Locally, FREE NOW started several initiatives to help drivers to transition to an electric vehicle. Here are three examples:**

- In Ireland FREE NOW initiated an EV Roadshow where drivers thinking of making the switch to an electric car got the opportunity to meet leading EV manufacturers as well as hear from experts about the latest developments in the industry. Furthermore, the FREE NOW team informed drivers about the recent Electric SPSV Grant Scheme and helped them apply.
- In Portugal, EV drivers qualify for 0% commission when using the FREE NOW app. Every driver in Portugal that is driving for the EV-only fleet does not pay commission to FREE NOW since April 2022. The initiative gave the number of active EV drivers in Portugal a real boost and therefore was prolonged until March 2023.
- In Spain, the eco taxi fleet is promoted as first choice for FREE NOW users. As a result, already 71% of the fleet in Spain is electric or hybrid - the number has doubled since January 2022.





# ROAD TO ZERO EMISSION

Achievements

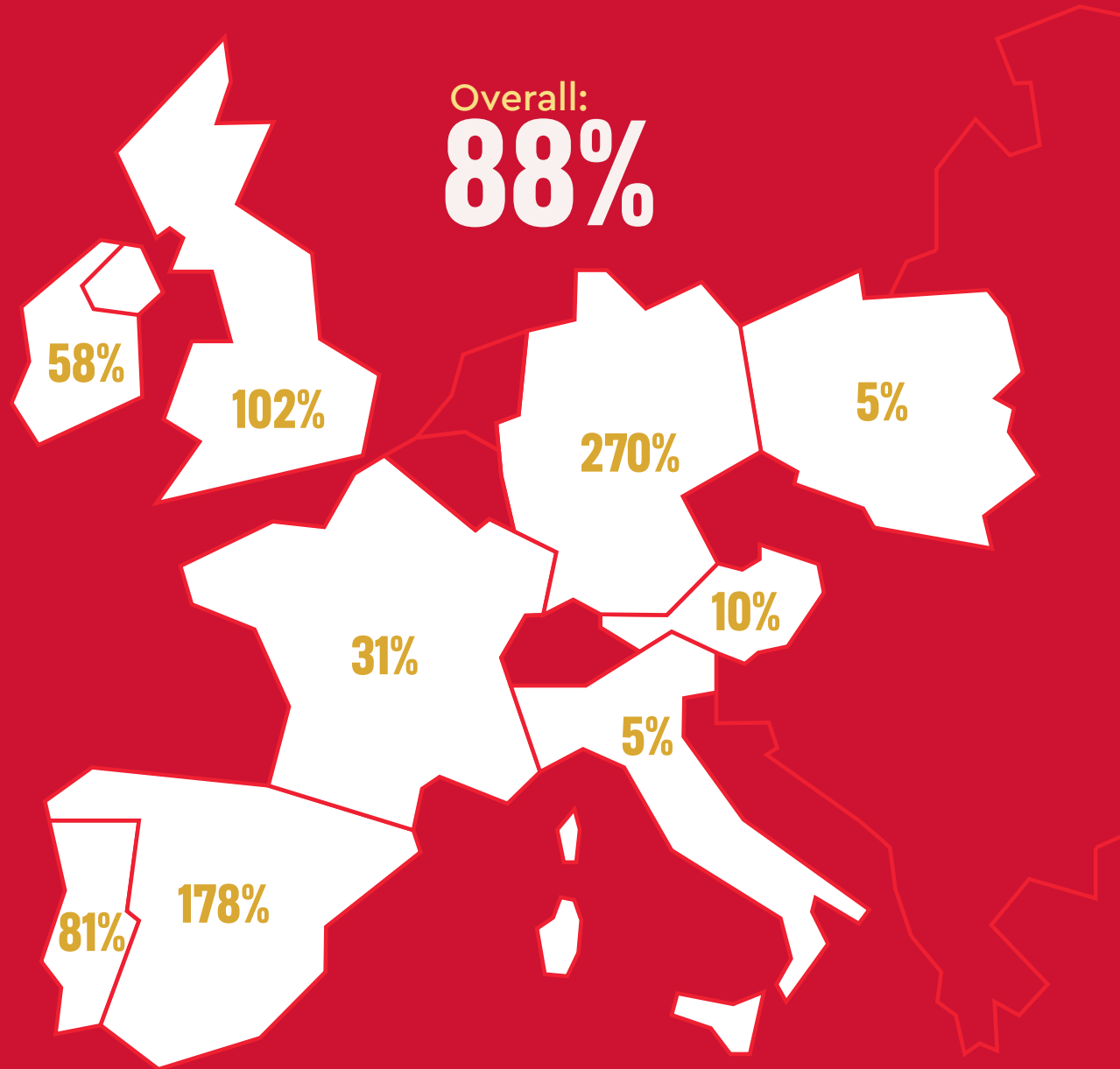
FREE NOW **ELECTRIC FLEET**  
SIZE COMPARISON:



2021



2022



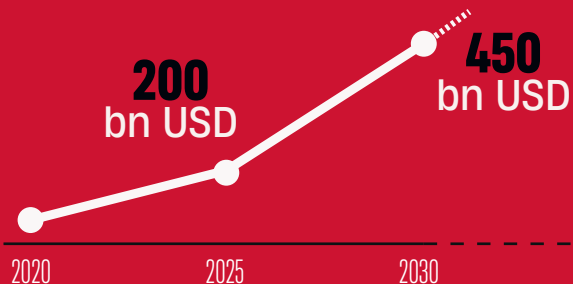
**% INCREASE IN ACTIVE EV DRIVERS BETWEEN 2021 AND 2022**

# TRENDS AND OUTLOOK

## MAAS\* MARKET ANNUAL GROWTH:



## MAAS\* MARKET EXPECTED GROWTH:



\*Mobility as a Service (MaaS)

## #1 FIFTEEN MINUTE CITY

The 15 Minute City follows the concept that everything citizens need can be accessed within 15 minutes by walking, biking, using public transport or a shared micro mobility service. By reducing car traffic in cities, space can be redistributed for activity areas, urban greening and other activities – making cities liveable and vibrant.

## #2 SINGLE APP SOLUTION:

The urban population demands a one-app solution for mobility, with every available option at their fingertips – be it taxi, car sharing, public transport or eBikes. The future is a fully integrated urban mobility ecosystem. In this complex market, specialised players will find success with customised solutions.

## #3 FLEXIBLE MOBILITY SPENDINGS

With more people working from home on a regular basis, a company car or a monthly public transport ticket has become outdated. More companies will instead introduce a mobility budget: a monthly allowance employees can use for commuting – and in their free time. With this employees can access a range of transport options – taxis, car sharing, and eco-friendly options in eScooters and eBikes.

## #4 COLLABORATION FOR GREEN MOBILITY:

Cities must provide access to high quality multi-mobility options – prioritising green transport solutions over individual mobility. Therefore, collaboration with MaaS platforms will be key. Cities don't need more vehicles. Platforms like FREE NOW aggregate existing supply and make new mobility more efficient.

# OUTLOOK:

## Accelerating Urban Change



**THOMAS ZIMMERMANN**

CEO of FREE NOW

**There's a shared understanding that cities need to change. People want less congestion and pollution and more space. But what accelerates positive urban change? How do we create better, cleaner cities?**

### **WE REDUCE COMPLEXITY.**

In 2022, FREE NOW delivered on its promise to offer consumers the widest choice of vehicles, establishing itself as the leading provider of multi-mobility in Europe. Not only did we win new partners for micro-mobility and car sharing, but we were also the first Mobility-as-a-Service platform in Europe to integrate public transport end-to-end in our app. And with new products like the Mobility Budget, we enable our users to unlock all urban mobility needs, suited to their personal use case.

This year, MaaS entered the mainstream and reached a wider audience. Overall, we see the mobility market in a constant state of flux, with frequent changes of players and emergence of new forms of mobility. It's great to see the growing diversity of new services and providers, but there's also a strong need for less complexity and more accessibility.

For FREE NOW, MaaS is all about facilitating freedom of choice and providing the most intuitive user experience. We make this possible by aggregating the existing supply on just one Mobility Super App. This can be public transport, micro-mobility, car sharing, a taxi – or any other form of shared vehicle that the future might hold. In 2023, we'll continue to deliver fast and frictionless urban mobility, with exciting new mobility partnerships, strong collaborations with cities and ride-hailing as our core strength.

The future of urban mobility is to be driven by MaaS platforms leading the way through innovation and, most importantly: collaboration. Further acceleration can only happen if it's supported by our cities and municipalities. For a successful mobility revolution, companies can't do it in isolation. We all need to work hand in hand.

# **FREENOW** ✓

## The Mobility Super App

### **MOBILITY REPORT 2023**

Source: All Data of the report is based on recent trip and fleet data or surveys from FREE NOW, unless otherwise specified