

Private and shared e-scooters and shared e-bikes in Norway

Main findings from annual national user surveys 2021-2024

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Four years of annual national e-scooter and shared micromobility user surveys documented.

E-scooters are mainly used for short trips under 15 minutes, in city centres and urban areas. 20-25 percent of the trips are first/last mile trips typically connecting to public transport. An average shared e-scooter trip is associated with NOK 84 (app. EUR 7) in local spending, amounting to roughly one billion NOK (app. EUR 85m) annually in Oslo. About one in ten users report an accident requiring medical attention during the past year, which corresponds to 48 accidents per million kilometres. Helmet is used in about 10 percent of shared e-scooter trips and 30 percent of private e-scooter trips.

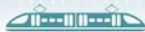
Background and data

The report documents four web surveys conducted between 2021 and 2024 as part of the project *Knowledge building for sustainable regulation of shared e-scooters (MikroReg)*, and in 2024 also the *MikroForum* project.

The surveys were mainly distributed to registered users of shared e-scooter rental companies. In total, 8,017 responses were analysed, of which 2,666 were from 2024. The dataset primarily covers shared e-scooters users but also includes users of privately owned e-scooters and shared e-bikes. Kolumbus' city bikes scheme was also included in the survey, but this part of the gross sample is not analysed in detail in this report.

Use, purpose, and contribution to the local economy

- E-scooters are primarily used for short, urban trips lasting less than 15 minutes.
- Commuting to and from work or school dominates among trip purposes for shared micromobility.
- About one in four trips is part of a combined trip, most often as first or last mile of a public transport trip.
- Approximately half of shared e-scooter trips are paid with a pass (daily, weekly, or monthly), while the other half are *pay as you go* trips.



Respondents who reported using an e-scooter on their most recent trip for the purpose of shopping, visiting a café or restaurant, or attending cultural events were given a follow-up question about spending on these activities. The analysis shows that an average shared e-scooter trip – regardless of purpose – is associated with NOK 84 in local spending (or sales). For all trips in Oslo over a year, this amounts to roughly one billion NOK in total local economic activity.

Role in urban mobility

E-scooters both complement and compete with public transport. Twenty-five percent of shared e-scooter trips connect to another mode of transport, while one-third of all trips would have been made by public transport if an e-scooter had not been available. Slightly more than half of the shared e-scooter trips replace walking. Shared e-scooters only marginally reduce car use in central urban areas. About seven percent of users state that their most recent trip with a shared e-scooter or shared e-bike would have been made by car or taxi if an e-scooter or e-bike were not available. This share is higher among private e-scooter users: around 25 percent report they would have used a car or taxi for their most recent trip if their private e-scooter were not available.

Asked what would encourage them to combine e-scooters and public transport more often, users pointed to *price integration* as the strongest measure—meaning, for example, that a valid public transport ticket would include a set number of e-scooter minutes, or vice versa, that an e-scooter subscription would include access to public transport.

More generally, one-third of respondents say they use taxis less often due to e-scooters. Twenty-nine percent travel less by public transport, and 23 percent walk less. Activities that respondents report doing *more often* include “arriving on time for appointments or meetings”, “be outside of home more frequently”, and “being more socially active”, cited by 38, 24, and 23 percent of respondents, respectively.

Safety, helmet use, and knowledge of rules

About one in ten users report having been involved in an accident requiring medical attention during the past year. Based on survey responses, this corresponds to 48 accidents requiring medical care per million kilometres on shared e-scooters. Other data sources, such as trip and emergency department statistics, indicate a lower risk but capture only accidents treated at casualty clinics.

Despite an improvement since 2022, when five percent reported wearing a helmet on their last trip with a shared e-scooter, the 2024 figure of ten percent remains low. Helmet use is much higher among private e-scooter riders: slightly more than 30 percent report wearing a helmet on their last trip.

Most users are aware of the main e-scooter rules such as the ban on tandem riding, the blood alcohol limit, and the speed limiter. However, many are uncertain about details like the liability insurance requirement and parking fines. Many also believe the rules are stricter than they actually are, for example regarding age limits and mandatory helmet use.

Conclusion

Safety and knowledge of regulations remain areas for improvement, but users generally report high satisfaction and appreciate the flexibility and time savings associated with e-scooters.



Geofencing should be further developed to strike a better balance between safety, usability, and mobility.

TØI's annual user surveys on e-scooters and shared micromobility provide a unique insight into current status and trends. In this report, we have shown how some simple relationships can be analysed, while the potential for further research based on these annual national user surveys is considerable.

Appendix 1 presents frequency distributions for a wide range of survey questions, and Appendix 2 contains the full questionnaire.