

Mobility-as-a-Service Market - A Global and Regional Analysis: Focus on Mobility-as-a-Service Applications and Services - Analysis and Forecast, 2024-2033

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Abstracts

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Mobility-as-a-Service Market Overview

The mobility-as-a-service market was valued at \$77,661.9 million in 2023, and it is expected to grow at a CAGR of 25.67% and reach \$7,60,207.2 million by 2033. The mobility-as-a-service (MaaS) market thrives due to the integration of advanced digital platforms, driving innovations in seamless transportation solutions, real-time data analytics, and user-centric services. Strategic partnerships between public and private sectors and regulatory support further shape this dynamic market, focusing on enhancing urban mobility, reducing congestion, and promoting sustainable transportation options for optimal efficiency and user satisfaction.

Introduction to Mobility-as-a-Service

The mobility-as-a-service market integrates various transportation services into a unified, accessible platform, enhancing convenience, efficiency, and sustainability. It covers applications such as passenger transportation, freight transportation, micro-mobility, journey planning, and personalized application services. The market offers products such as ride-sharing, car-sharing, bike-sharing, and flexible payment solutions, leveraging advanced technologies, including AI, IoT, and cloud-based services. This integration enables real-time tracking, seamless payments, and personalized journey management, aiming to optimize urban mobility, reduce congestion, and improve the overall user experience. By connecting different modes of transport, MaaS fosters a

more cohesive and efficient transportation ecosystem, catering to the evolving demands of modern commuters and businesses.

Market Introduction

The mobility-as-a-service market is transforming urban transportation by integrating various modes of transport into a single accessible digital platform. This innovation allows users to plan, book, and pay for different transportation services, such as public transit, ride sharing, bike sharing, and car rentals, through a unified interface. By utilizing real-time data and advanced algorithms, these solutions optimize route planning, reduce travel time, and enhance convenience for users. The market is driven by growing urbanization, increasing smartphone penetration, and a shift toward sustainable and efficient transportation options. Additionally, strategic collaborations between governments, transportation providers, and technology companies are essential in promoting market growth and innovation. These services aim to improve the overall travel experience and address critical urban challenges such as traffic congestion, pollution, and limited parking spaces, thereby promoting environmental sustainability and smarter city planning. Overall, the mobility-as-a-service market is pivotal in shaping the future of urban mobility by prioritizing efficiency, sustainability, and user-centric solutions.

Industrial Impact

The mobility-as-a-service market (MaaS)'s industrial impact extends across urban transportation, technology development, and sustainable mobility solutions. The advancements in MaaS platforms drive innovation and promote the development of integrated and user-centric transportation networks. This increases collaborations between public transit authorities, technology providers, and private transport operators, elevating service standards and pushing R&D boundaries. Additionally, it increases job creation in software development, data analytics, and urban planning sectors, supporting the broader MaaS ecosystem. Moreover, the emphasis on efficient and sustainable mobility solutions aligns with global sustainability goals, influencing broader urban transportation practices and promoting eco-friendly and efficient transit options.

The key players operating in the mobility-as-a-service market include BlaBlaCar, Car2go NA, LLC, Citymapper Limited, DiDi Chuxing, Grab, Lyft, Inc., Uber Technologies Inc., Moovit Inc., Ola Electric Mobility Pvt Ltd., Zoox, Inc., Careem, EasyMile, RideCell, Inc, FOD Mobility UK Ltd. and moovel North America, LLC. These companies are focusing on strategic partnerships, collaborations, and acquisitions to enhance their

product offerings and expand their market presence.

Market Segmentation:

Segmentation 1: by Application

Passenger Transportation

Freight Transportation

Micro-Mobility

Passenger Transportation to Lead the Mobility-as-a-Service Market (by Application)

Passenger transportation by application is leading the mobility-as-a-service market due to its convenience, integration, and technological innovation. For instance, in April 2021, BlaBlaCar raised \$115 million to accelerate its expansion strategy, highlighting the growing demand for app-based carpooling and bus services globally. Similarly, in June 2022, Uber Technologies Inc. launched UberX Share, allowing passengers to share rides, reducing costs, and promoting sustainable transportation. App-based platforms offer seamless integration of various transport modes. For instance, in April 2023, Lyft, Inc. expanded its Green Mode to more cities, emphasizing its commitment to eco-friendly transportation solutions.

This integration not only enhances user convenience but also supports environmental sustainability. Technological advancements further drive this market. In October 2021, Moovit Inc. introduced a new feature for real-time crowding information, improving passenger experience by allowing better travel planning. Such innovations make app-based MaaS solutions highly attractive to users. These instances illustrate how passenger transportation applications are revolutionizing the MaaS market, offering efficient, integrated, and sustainable travel options that cater to modern consumer needs.

Segmentation 2: by Service

On-the-Go Rides

Carpool

Ride Hailing

Cars

Scooters and Bikes

Air Taxi

Logistics

Light Duty Commercial Vehicles

Heavy Duty Commercial Vehicles

Renting

Car Renting

Bicycle Renting

Ride Sharing

Cars

Train/Subway Services

Bus Services

Others

Ride Hailing to Lead the Mobility-as-a-Service Market (by Service)

Ride-hailing services are significantly advancing the mobility-as-a-service market by integrating diverse transportation modes into seamless, user-centric solutions. This model not only enhances urban mobility but also drives technological and sustainable transport innovations. For instance, in April 2021, BlaBlaCar announced a \$115 million funding round aimed at accelerating its global expansion. This investment underscores

the ride-hailing sector's robust growth and its crucial role in the broader MaaS ecosystem, emphasizing the transition from traditional transport methods to integrated services.

Additionally, in June 2021, Uber Technologies Inc. and Lyft, Inc., major players in the ride-hailing segment, demonstrated their resilience and adaptability by expanding services to include deliveries and other non-passenger services during the pandemic. This strategic pivot not only sustained operations but also positioned them as integral components of urban mobility solutions. These instances highlight how ride-hailing is leading the MaaS market by evolving service offerings to meet the changing needs of urban environments and contributing significantly to the development of integrated, sustainable urban transport systems.

Segmentation 3: by Solution

Payment Engines

Navigation Solutions

Connectivity Providers

Ticketing Solutions

Insurance Solutions

Payment Engines to Lead the Mobility-as-a-Service Market (by Solution)

Payment engines, integrated as a key component of mobility-as-a-service platforms, are significantly enhancing service delivery by streamlining transaction processes. These systems facilitate seamless fare collection across diverse transportation modes, simplifying user experiences and improving operational efficiencies. In April 2021, Visa collaborated with Citymapper to enable direct payments within the app, exemplifying how payment engines are being tailored to meet the specific needs of urban travelers. Such integrations allow users to manage their transportation expenses across multiple services, including buses, trains, and ride-sharing, within a single platform. These instances highlight the vital role payment engines play in enhancing the accessibility and adoption of MaaS solutions by providing a streamlined, secure, and efficient user payment experience.

Segmentation 4: by Region

North America: U.S., Canada, and Mexico

Europe: Germany, France, U.K., Italy, and Rest-of-Europe

Asia-Pacific: China, Japan, India, South Korea, and Rest-of-Asia-Pacific

Rest-of-the-World: South America and Middle East and Africa

Asia-Pacific is leading the mobility-as-a-service market due to several key factors. First, rapid urbanization and population growth in major cities increase the demand for efficient transportation solutions. Second, strong government initiatives and investments in smart city projects boost the adoption of mobility-as-a-service. Third, high smartphone penetration and advanced digital infrastructure support seamless integration of services. Fourth, the presence of key market players accelerates innovation and implementation. Fifth, growing environmental concerns push for sustainable transportation options. Additionally, rising disposable incomes and a tech-savvy population drive the acceptance of new mobility solutions. The region's dynamic economic growth further fuels market expansion.

Collaborative efforts between public and private sectors enhance the development and deployment of mobility services. Furthermore, the diverse and densely populated urban centers create a fertile ground for piloting and scaling up mobility-as-a-service initiatives. The competitive landscape, characterized by a mix of global and regional companies, drives continuous improvement and customer-centric innovations. Increased awareness of the benefits of reducing traffic congestion and pollution promotes a shift toward shared and multimodal transportation options. Additionally, advancements in technologies such as AI and IoT enable smarter and more efficient mobility solutions, further solidifying Asia-Pacific's leadership in this market.

Recent Developments in the Mobility-as-a-Service Market

In July 2023, Grab Holdings Limited announced the acquisition of Trans-cab Holdings Ltd, Singapore's third-largest taxi operator, enhancing its fleet and service capabilities with over 2,500 vehicles.

In May 2023, DiDi Chuxing formed a joint venture with GAC AION to mass-produce self-driving electric Robotaxis, aiming for large-scale deployment by 2025.

In May 2023, DiDi Autonomous Driving teamed up with Valeo to create intelligent safety solutions for L4 Robotaxis, with Valeo investing in DiDi Chuxing to strengthen this collaboration.

In April 2023, Grab introduced new in-app travel features and partnerships to provide a seamless, hyperlocal experience for travelers in Southeast Asia.

In September 2021, BlaBlaCar introduced an insurance offer and a driving coach app in partnership with Olivier. This initiative provides competitive car insurance and the 'BlaBlaCar Coach' app, which analyzes driving habits and offers safety advice. By promoting responsible driving and offering insurance discounts, BlaBlaCar is enhancing the mobility-as-a-service market with improved safety and affordability.

In April 2021, BlaBlaCar raised \$115 million from investors such as VNV Global, Otiva J/F AB, and FMZ Ventures to bolster its growth strategy and expand its market leadership, especially outside Europe. This investment aims to accelerate the company's expansion and digitalization efforts.

Demand - Drivers, Limitations, and Opportunities

Market Drivers: Innovation in Technology

Technology innovation is a pivotal driver in the mobility-as-a-service market due to its role in enhancing service efficiency, user experience, and operational integration. Advanced technologies such as real-time data analytics, AI, IoT, and blockchain enable seamless integration of various transportation modes, providing users with a cohesive and efficient travel experience. For instance, on April 25, 2024, Tencent Holdings advanced the widespread adoption of its AI-powered smart mobility solutions to accelerate the production of next-generation smart vehicles in the world's largest electric vehicle (EV) market. At an event in Beijing, senior executives highlighted the benefits of these solutions, which leverage the company's large language model (LLM) technology, like that used in generative AI services such as ChatGPT. This innovation not only enhances the in-vehicle experience but also improves efficiencies throughout

the supply chain.

Moreover, on January 24, 2024, Stellantis announced the acquisition of CloudMade's artificial intelligence technologies and intellectual property, aiming to enhance personalized mobility experiences in the mobility-as-a-service market. This acquisition aligns with Stellantis' Dare Forward 2030 software strategy by integrating an AI-powered framework into its vehicles and mobile apps. With customer consent, CloudMade's AI software collects and analyzes automotive data, offering personalized and predictive features that will support the mid-term development of the STLA SmartCockpit. The transaction also includes onboarding CloudMade's engineers and software developers, underscoring Stellantis' commitment to driving technological innovation in the MaaS industry.

Market Challenges: Implementation of MaaS

The implementation of mobility-as-a-service (MaaS) poses significant challenges due to the complexity of integrating multiple transportation modes and technologies. Coordinating between various stakeholders, such as public transit authorities, private transport providers, and technology developers, requires substantial effort and collaboration. Additionally, ensuring seamless data exchange and interoperability among different systems can be technically demanding. There are also regulatory and compliance issues to navigate, as well as the need for substantial upfront investment in infrastructure and technology. These challenges make the effective implementation of MaaS a critical hurdle in the market.

According to Walker and Marchau's 2017 study, the implementation of mobility-as-a-service (MaaS) faces significant challenges due to deep uncertainties, such as public acceptance, liability, and privacy concerns. The study suggests that an adaptive policymaking approach is essential to address these issues, allowing for flexibility and adjustments over time as more information becomes available. This approach includes initial actions such as implementing conditionally automated vehicles and educating drivers while monitoring developments and preparing for future changes. Despite legal, political, and analytical barriers, this adaptive strategy is promising for managing uncertainties in MaaS implementation.

Market Opportunities: Incorporating On-Demand Ferry and Freight Services

Incorporating on-demand ferry and freight services presents a significant opportunity in the mobility-as-a-service market. These services can expand the scope of MaaS by

offering diverse and flexible transportation options and addressing gaps in current urban and regional mobility solutions. On-demand ferries can alleviate road congestion and provide efficient water-based transit, while on-demand freight services enhance logistics and supply chain efficiency. This integration enhances MaaS platforms' attractiveness, supporting sustainable transport solutions and meeting the increasing demand for versatile and adaptive mobility services.

For instance, on November 14, 2022, HITRANS announced the integration of NorthLink Ferries into its Go-Hi mobility-as-a-service (MaaS) app, highlighting the potential of on-demand ferry services within the MaaS market. This integration enables users to travel to Orkney and Shetland, making Go-Hi the first U.K. MaaS platform to include fully integrated ferry services. This expansion offers passengers seamless booking for multimodal travel, including air, ferry, rail, and bus services, enhancing convenience and accessibility. Such incorporations present significant opportunities for diversifying MaaS offerings and improving transport connectivity.

Moreover, on October 25, 2023, Liftango and May Mobility announced a partnership to enhance dynamic on-demand shared transport solutions with autonomous vehicles. This collaboration exemplifies the opportunity to incorporate on-demand ferry and freight services in the MaaS market. By leveraging autonomous vehicle technology and shared mobility solutions, this partnership aims to optimize transit across various regions. Similarly, integrating on-demand ferry and freight services can enhance connectivity, efficiency, and accessibility in MaaS platforms, addressing mobility needs in urban and rural areas. This approach broadens the scope and effectiveness of MaaS solutions.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different applications of mobility-as-a-service based on application (passenger transportation, freight transportation, and micro-mobility), by service (on-the-go rides, carpool, ride hailing, logistics, renting, ride sharing, and others) and by solution (payment engines, navigation solutions, connectivity providers, ticketing solutions, and insurance solutions). The market is poised for significant expansion with ongoing technological advancements, increased investments, and growing awareness of the importance of mobility-as-a-service. Therefore, the mobility-as-a-service business is a high-investment and high-revenue generating model.

Growth/Marketing Strategy: The mobility-as-a-service market has been growing at a

rapid pace. The market offers enormous opportunities for existing and emerging market players. Some of the strategies covered in this segment are mergers and acquisitions, product launches, partnerships and collaborations, business expansions, and investments. The strategies preferred by companies to maintain and strengthen their market position primarily include product development.

Competitive Strategy: The key players in the mobility-as-a-service market analyzed and profiled in the study include professionals with expertise in the automobile and automotive domains. Additionally, a comprehensive competitive landscape such as partnerships, agreements, and collaborations are expected to aid the reader in understanding the untapped revenue pockets in the market.

Research Methodology

Factors for Data Prediction and Modeling

The scope of this report has been focused on various types of mobility-as-a-service applications and product types.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

Nearly all the recent developments from January 2021 to June 2024 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no

major breakthroughs in technology.

Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the mobility-as-a-service market.

The process of market engineering involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes is explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Primary Research

The primary sources involve industry experts from the mobility-as-a-service market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

- validation and triangulation of all the numbers and graphs
- validation of reports segmentation and key qualitative findings
- understanding the competitive landscape
- validation of the numbers of various markets for market type
- percentage split of individual markets for geographical analysis

Secondary Research

This research study of the mobility-as-a-service market involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the aforementioned data sources, the study has been undertaken with the help of other data sources and websites, such as IRENA and IEA.

Secondary research was done in order to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

- segmentations and percentage shares

- data for market value

- key industry trends of the top players of the market

- qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

- quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled in the mobility-as-a-service market have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Some of the prominent names in this market are:

- BlaBlaCar

- Car2go NA, LLC

Citymapper Limited

DiDi Chuxing

Grab

Lyft, Inc.

Uber Technologies Inc.

Moovit Inc.

Ola Electric Mobility Pvt Ltd.

Zoox, Inc.

Careem

EasyMile

Ridecell, Inc.

FOD Mobility UK Ltd.

moovel North America, LLC.

Companies that are not a part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

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