

# **Micro-mobility Market Report by Type (Bicycles, E-Bike, E-kick Scooters, and Others), Propulsion Type (Manual, Electrically-powered, Hybrid), Sharing Type (Docked, Dock-less), Speed (Less than 25 Kmph, Above 25 Kmph), Age Group (15-34, 35-54, 55 and Above), Ownership (Business-To-Business, Business-To-Consumer), and Region 2024-2032**

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## **Abstracts**

The global micro-mobility market size reached US\$ 55.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 185.9 Billion by 2032, exhibiting a growth rate (CAGR) of 13.98% during 2024-2032. The escalating trend of health and fitness awareness among consumers, the widespread adoption of micro-mobility solutions and the integration with public transport systems to provide seamless end-to-end transit solutions are some of the major factors propelling the market.

Micro-mobility refers to a category of transportation that involves small, lightweight vehicles typically used for short distances, generally up to 10 miles. This class of transit includes a variety of vehicles such as bicycles, electric scooters, e-bikes, and even compact electric cars. It has gained significant popularity in urban environments where car usage can be challenging due to heavy traffic and limited parking. It offers an effective solution for the last-mile problem, which refers to the difficulty of traversing the short distance from a transportation hub to a final destination. Moreover, these solutions contribute towards sustainability by reducing carbon emissions and promoting a healthier lifestyle. The market has been growing exponentially, driven by technological advancements, changing commuting habits, and increasing demand for eco-friendly transport options. Hence, it has significant implications for urban planning, traffic management, and the broader transportation industry.

The growing trend of health and fitness awareness among consumers majorly drives the global market. Numerous options, such as bicycles and e-bikes provide an opportunity to incorporate physical activity into daily commuting routines. This active transportation mode contributes to healthier lifestyles, appealing to health-conscious consumers and encouraging the use of these services. Along with this, the younger generation, especially millennials and Generation Z, are displaying different commuting preferences from previous generations. They're more open to shared mobility solutions and less likely to own a car, driving the demand for alternatives. In addition, the covid-19 pandemic has accelerated the adoption of micro-mobility solutions. With social distancing becoming a necessity, more individuals are choosing individual transit options, including e-scooters and bicycles overcrowded public transport, thereby increasing the demand for these services. Apart from this, integration with public transport systems to provide seamless end-to-end transit solutions is contributing to the market. Moreover, innovative features such as GPS tracking, digital payments, and predictive analytics to make operations more efficient are creating a positive market outlook.

#### Micro-mobility Market Trends/Drivers: Urbanization and Traffic Congestion

One of the key market drivers is the increasing rate of urbanization and the subsequent rise in traffic congestion. With more consumers moving into cities, traditional modes of transportation such as cars are becoming less efficient due to overcrowded roads and limited parking spaces. In many urban environments, short car trips often take longer than expected due to traffic, and finding parking can be time-consuming and expensive. These solutions, including e-scooters or bicycles, provide a quick, convenient, and cost-effective alternative for these shorter trips, often covering the last mile more efficiently than cars. These factors have driven an increasing number of urban dwellers to adopt these solutions, significantly impacting the growth of the market.

#### Sustainability and Environmental Concerns

There is growing awareness about the environmental impact of our transportation choices, with greenhouse gas emissions from vehicles contributing significantly to global warming. As a response, many consumers are seeking more sustainable alternatives, driving the demand. Electric bikes and scooters produce no emissions during operation, and even when considering the emissions from electricity generation, they are typically much cleaner than conventional vehicles. Furthermore, these options

often replace car trips, they can contribute to improved air quality in urban environments. This drive towards sustainability and increased environmental consciousness among consumers has a considerable impact on the expansion of the market.

### Regulatory Support and Infrastructure Development

Governments and city authorities across the globe are recognizing the potential of micro-mobility in reducing congestion, improving air quality, and creating more livable urban spaces. As such, they are increasingly providing regulatory support for the solutions, including creating designated lanes for e-scooters and bicycles, adjusting traffic rules to accommodate these new forms of transportation, and providing incentives for the providers. In addition to policy support, there is an increased emphasis on developing the necessary infrastructure, such as dedicated bike lanes, parking docks, and charging stations. These governmental actions are instrumental in promoting the adoption of micro-mobility and are crucial drivers of the market.

### Micro-mobility Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global micro-mobility market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on type, propulsion type, sharing type, speed, age group, and ownership.

### Breakup by Type:

- Bicycles
- E-Bike
- E-kick Scooters
- Others

Bicycles dominate the market

The report has provided a detailed breakup and analysis of the market based on the type. This includes bicycles, e-bike, e-kick scooters, and others. According to the report, bicycles represented the largest segment.

Bicycles have emerged as a prominent mode of transportation, driven by the increasing emphasis on sustainable and eco-friendly modes of commuting. This is leading to a rise in the adoption of bicycles as a clean and green alternative to traditional vehicles.

Additionally, growing urbanization and traffic congestion have prompted individuals and cities to seek efficient and flexible means of transportation, with bicycles offering a practical solution for short-distance travel. Along with this, the accelerating health consciousness among consumers has influenced the demand for bicycles, as they not only facilitate physical activity and contribute to improved overall well-being. Moreover, the advancements in technology and the integration of smart features in modern bicycles have further bolstered their appeal to tech-savvy commuters. As these market drivers continue to gain traction, the industry is witnessing a significant expansion, and bicycle types remain at the forefront of this positive transformation.

#### Breakup by Propulsion Type:

Manual

Electrically-powered

Hybrid

Electrically-powered dominate the market

A detailed breakup and analysis of the market based on the propulsion type have also been provided in the report. This includes manual, electrically-powered, and hybrid. According to the report, electrically-powered represented the largest segment.

The electrically-powered propulsion types are driven by the increasing concern for environmental sustainability. This is encouraging consumers and cities alike to seek greener transportation options. Electrically-powered devices, such as e-scooters and e-bikes, offer emission-free alternatives that align with the growing demand for eco-friendly commuting solutions. Secondly, the convenience and cost-effectiveness of electric propulsion systems appeal to urban dwellers looking for efficient ways to navigate congested city centers. With reduced operational expenses and minimal maintenance requirements, electric micro-mobility options present an attractive choice for both consumers and fleet operators. Additionally, advancements in battery technology have extended the range and improved the performance of electric vehicles, further enhancing their appeal. As these market drivers continue to influence the industry, the adoption of electrically-powered propulsion type is poised to expand, reshaping urban transportation landscapes in a sustainable and forward-thinking manner.

#### Breakup by Sharing Type:

Docked  
Dock-less

Docked dominate the market

The report has provided a detailed breakup and analysis of the market based on the sharing type. This includes docked and dock-less. According to the report, docked represented the largest segment.

The need for organized and systematic mobility solutions in urban areas has led to the popularity of docked sharing systems. By providing designated docking stations, these services offer a reliable and convenient means for users to access and return the vehicles efficiently. In addition, the partnership opportunities between several leading companies and city authorities have facilitated the establishment of well-placed docking infrastructure, fostering a seamless integration with existing transportation networks. Moreover, the predictability and accessibility offered by docked sharing systems have garnered trust among users, assuring them of vehicle availability and reducing concerns related to parking and security. Additionally, the potential reduction in sidewalk clutter, compared to dockless models, has gained favor from city planners and residents alike. As these market drivers continue to shape the market landscape, the docked sharing type is poised to play a pivotal role in transforming urban transportation, enhancing efficiency, and contributing to sustainable urban mobility solutions.

Breakup by Speed:

Less than 25 Kmph  
Above 25 Kmph

Less than 25 Kmph dominate the market

A detailed breakup and analysis of the market based on the speed have also been provided in the report. This includes less than 25 Kmph, and above 25 Kmph. According to the report, less than 25 Kmph represented the largest segment.

The 25 kmph speed limitation has become a significant market driver in the industry due to its alignment with safety and regulatory considerations. Several cities and countries have imposed speed restrictions on micro-mobility devices to ensure the well-being of riders and pedestrians in shared spaces. By capping the speed at 25 kmph, vehicles strike a balance between being fast enough to provide efficient transportation for short-

distance trips and being slow enough to mitigate the risk of accidents and collisions. In addition, this speed limitation promotes responsible riding behavior, reducing the likelihood of reckless maneuvers and enhancing overall road safety. Moreover, adhering to such speed limits help these service providers comply with local regulations, fostering a positive relationship with city authorities and gaining broader acceptance within communities. As a result, the 25 kmph speed limit serves as a crucial market driver, supporting the sustainable growth and integration of these solutions in urban environments.

#### Breakup by Age Group:

15-34

35-54

55 and Above

15-34 age group dominates the market

The report has provided a detailed breakup and analysis of the market based on the age group. This includes 15-34, 35-54, 55, and above. According to the report, 15-34 age group represented the largest segment.

The 15-34 age group is characterized by a strong inclination towards urban living, seeking convenient and flexible transportation options to navigate bustling cityscapes. These services, such as e-scooters and bike-sharing, cater perfectly to their preferences for short-distance commuting, providing a cost-effective and eco-friendly alternative to traditional modes of transport. Additionally, the tech-savvy nature of this age group aligns with the smart and connected features often integrated into vehicles, enhancing their appeal. Also, the 15-34 age group's openness to embracing new mobility solutions, combined with their environmental consciousness and desire for instant accessibility, makes them early adopters and avid users of micro-mobility services. As a result, catering to the needs and preferences of this demographic remains crucial for sustained success and expansion within the market.

#### Breakup by Ownership:

Business-To-Business

Business-To-Consumer

Business-To-consumer dominate the market

A detailed breakup and analysis of the market based on the ownership have also been provided in the report. This includes business-to-business and business-to-consumer. According to the report, business-to-consumer represented the largest segment.

The business-to-consumer (B2C) ownership model serves as a prominent market driver in the micro-mobility industry, propelled by the desire for personalized mobility solutions. It is encouraging individuals to seek ownership of devices such as e-scooters and e-bikes, providing them with greater control over their transportation options. B2C ownership allows users to have unrestricted access to their preferred vehicle whenever needed, enhancing convenience and reducing reliance on other transportation modes. Along with this, the appeal of ownership lies in the potential cost savings over time compared to frequent rental fees. By investing in their own micro-mobility device, consumers can benefit from long-term affordability and avoid recurrent rental expenses. In addition, owning a vehicle empowers individuals to customize and maintain their rides according to their preferences, contributing to a sense of ownership and attachment. As B2C ownership models continue to gain popularity, they play a pivotal role in shaping the market, fostering sustainable and efficient urban transportation solutions for consumers across the globe.

#### Breakup by Region:

- North America
  - United States
  - Canada
- Asia Pacific
  - China
  - Japan
  - India
  - South Korea
  - Australia
  - Indonesia
  - Others
- Europe
  - Germany
  - France
  - United Kingdom
  - Italy
  - Spain



Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific represented the largest market

The industry in the Asia Pacific region is driven by its rapid growth and expansion. Additionally, the region's growing population, along with increasing urbanization and traffic congestion, has created a pressing need for efficient and sustainable transportation solutions. Micro-mobility services, such as bike-sharing and e-scooters, offer a practical and eco-friendly option for short-distance commutes, appealing to the growing number of urban dwellers. In addition, the prevalence of smartphones and the widespread adoption of digital payment systems in Asia Pacific have facilitated seamless access to services through user-friendly mobile applications. This tech-savvy demographic is receptive to app-based mobility solutions, contributing to the industry's success. Apart from this, favorable government policies and initiatives promoting cleaner transportation alternatives have further boosted the sector's prospects in the region. As these market drivers continue to gain momentum, the micro-mobility industry in the Asia Pacific is becoming a transformative force, revolutionizing urban transportation and fostering sustainable mobility solutions.

#### Competitive Landscape:

The global micro-mobility market is experiencing significant growth due to the incorporation of GPS tracking, mobile apps, and IoT devices to provide users with real-time vehicle location, convenient booking options, and seamless user experiences. Along with this, the escalating number of strategic partnerships with cities, transportation authorities, and private entities to establish mutually beneficial relationships is positively influencing the market. These collaborations often aim to



integrate these services into existing public transportation networks and improve last-mile connectivity. In response to growing environmental awareness, several companies are emphasizing sustainability. They are adopting eco-friendly practices such as using renewable energy for charging, utilizing recyclable materials in vehicle construction, and implementing recycling programs for end-of-life vehicles. Apart from this, adhering to local regulations is crucial for micro-mobility companies to maintain a positive relationship with cities and governments. They are actively engaging with policymakers to influence regulations and ensure compliance with local laws, creating a positive market outlook.

The report has provided a comprehensive analysis of the competitive landscape in the global micro-mobility market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Accell Group N.V.  
Beam Mobility Holdings Pte. Ltd.  
Bird Rides Inc.  
CycleHop LLC  
Dott  
Lime (Neutron Holdings, Inc)  
Micro Mobility Systems AG  
Neuron Mobility  
Segway Discovery Inc.

#### Recent Developments:

In March 2023, Beam Mobility Holdings Pte. Ltd. launched in Subang Jaya, Selangor, the 8,000 square foot Malaysian central warehouse is an endeavor to serve the country's expanding presence. The warehouse will support the business' operations in the state by supplying a consistent supply of fully charged batteries and performing hardware upkeep on all of its rides.

In May 2023, Bird Rides Inc. stated that it would begin offering service in eight additional cities in the US, Canada, and Australia. The company's well-liked micromobility products, including its e-scooters and e-bikes, will reach even more users in these new markets when they launch over the coming spring and summer months, giving more communities access to sustainable and reasonably priced transportation options.

In March 2023, Dott announced a strategy to increase e-scooter longevity by twofold. In Lyon, France, it will launch its new project. Its machines now have a three-year projected lifespan, but at that point, they will go through a thorough refurbishment to

extend their usable lifetime to seven years.

#### Key Questions Answered in This Report:

How has the global micro-mobility market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global micro-mobility market?

What is the impact of each driver, restraint, and opportunity on the global micro-mobility market?

What are the key regional markets?

Which countries represent the most attractive micro-mobility market?

What is the breakup of the market based on the type?

Which is the most attractive type in the micro-mobility market?

What is the breakup of the market based on the propulsion type?

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