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Neighborhood Mobility-as-a-Service Market Forecasts to 2032 – Global Analysis By Solution (Journey Planning & Management, Payment, and Booking & Ticketing), Service, Propulsion Type, Payment Type, Business Model and By Geography

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Abstracts

According to Stratistics MRC, the Global Neighborhood Mobility-as-a-Service Market is accounted for $28.0 billion in 2025 and is expected to reach $61.8 billion by 2032 growing at a CAGR of 12% during the forecast period. Neighborhood Mobility-as-a-Service is a localized, integrated transportation platform. It bundles various transport options, such as ride-pooling, car rentals, and micro-mobility, into a single, accessible service. This model is specifically designed for travel within a residential community or a small urban district. Users can plan, book, and pay for multi-modal trips through a unified digital interface. The system's primary function is to provide a comprehensive, self-contained network of transit solutions tailored to the daily movement needs of a localized population.

According to Frost & Sullivan's mobility analytics, neighborhood-level MaaS models are gaining traction by integrating micro-vehicles and shared routes, enhancing connectivity between residential areas, local hubs, and public transport.

Market Dynamics:

Driver:

Adoption of electric neighborhood transport models

Adoption of electric neighborhood transport models serves as a key driver in the

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Neighborhood Mobility-as-a-Service Market, encouraged by sustainability mandates and the shift toward decarbonized mobility. Compact electric vehicles, e-bikes, and shared microcars are increasingly integrated into community transport systems. These models reduce congestion, emissions, and parking challenges within urban and semi-urban areas. Governments and private operators are jointly investing in low-emission mobility hubs, fostering a connected, eco-friendly neighborhood transport ecosystem that aligns with broader smart city development goals.

Restraint:

Limited consumer awareness in smaller towns

Limited consumer awareness in smaller towns continues to restrain the Neighborhood Mobility-as-a-Service Market. Many residents remain unfamiliar with digital booking platforms and the environmental advantages of shared mobility options. Additionally, the absence of robust infrastructure and app-based connectivity in suburban and rural regions limits service adoption. Behavioral resistance toward vehicle sharing further slows growth outside metropolitan areas. Overcoming this restraint requires targeted educational campaigns, local collaborations, and tailored pricing models to encourage participation among smaller communities and first-time users.

Opportunity:

Collaboration with community transit authorities

Collaboration with community transit authorities represents a major opportunity for expansion in the Neighborhood Mobility-as-a-Service Market. Partnering with municipal and regional agencies enables seamless integration between shared mobility services and public transportation networks. Such cooperation improves route planning, ensures regulatory compliance, and enhances accessibility for underserved populations. By connecting first%- %and last-mile transport gaps, these partnerships strengthen the MaaS ecosystem. Furthermore, data-sharing agreements with authorities foster operational efficiency, allowing neighborhood mobility platforms to scale sustainably across urban and suburban corridors.

Threat:

Municipal restrictions on shared vehicle zones

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Municipal restrictions on shared vehicle zones pose a significant threat to the Neighborhood Mobility-as-a-Service Market. Local governments often impose operational limits on parking spaces, speed zones, and fleet density to manage urban congestion. These regulatory constraints disrupt service flexibility and restrict revenue generation in densely populated areas. Additionally, inconsistent policy frameworks across jurisdictions create operational uncertainty for mobility providers. Addressing these challenges requires proactive engagement with city planners and policymakers to develop standardized, MaaS-friendly regulatory ecosystems that ensure long-term scalability.

Covid-19 Impact:

The Covid-19 pandemic initially disrupted the Neighborhood Mobility-as-a-Service Market due to movement restrictions and declining ridership. However, it later accelerated the transition toward personalized, contactless, and sustainable mobility options. Neighborhood-scale services emerged as safe alternatives to crowded public transport systems. Operators adopted hygiene protocols, app-based reservations, and cashless payments to rebuild consumer trust. As urban lifestyles evolved post-pandemic, demand for flexible, short-distance mobility surged, solidifying the importance of localized MaaS models in future urban mobility frameworks.

The journey planning & management segment is expected to be the largest during the forecast period

The journey planning & management segment is expected to account for the largest market share during the forecast period, resulting from increasing demand for integrated mobility platforms. These systems consolidate multiple transport options—such as bikes, e-scooters, and shuttles—into unified apps for seamless route planning. Consumers benefit from real-time navigation, fare transparency, and multimodal trip coordination. Service providers leverage AI-driven analytics to optimize routes and improve traffic flow. Consequently, journey management platforms have become central to enhancing the efficiency and accessibility of neighborhood mobility systems.

The ride-hailing segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the ride-hailing segment is predicted to witness the highest growth rate, propelled by rising urbanization and the preference for on-demand, flexible commuting solutions. Short-distance neighborhood rides are increasingly replacing

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private vehicle trips, reducing congestion and emissions. Aggregators are expanding micro-mobility fleets, integrating electric vehicles, and offering subscription-based pricing models. Technological advancements in booking platforms, GPS tracking, and dynamic pricing further support growth. As affordability and convenience improve, the ride-hailing segment continues to dominate the next phase of MaaS evolution.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, attributed to rapid urban development, dense populations, and supportive government mobility initiatives. Countries such as China, Japan, and India are prioritizing smart transportation networks that enhance first%- %and last-mile connectivity. Public-private partnerships are driving investment in shared mobility ecosystems and electric vehicle adoption. Additionally, growing digital penetration and mobile payment integration reinforce Asia Pacific’s position as a leading region for neighborhood MaaS deployment.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR associated with robust adoption of smart urban mobility solutions and high consumer acceptance of shared transportation. U.S. cities are increasingly incorporating neighborhood-scale MaaS models into sustainable city planning initiatives. Strong investment in EV infrastructure, micro-mobility fleets, and AI-based routing platforms further fuels growth. Moreover, local government collaborations and advanced data analytics capabilities strengthen North America’s role as a major growth frontier in the global MaaS landscape.

Key players in the market

Some of the key players in Neighborhood Mobility-as-a-Service Market include Uber, Lyft, Didi Chuxing, Bolt, Grab, Gojek, Ola, Careem, Gett, Cabify, FlixBus, Moovit, Citymapper, Whim, and MaaS Global.

Key Developments:

In August 2025, Whim by MaaS Global launched its 'Neighborhood Pass' subscription, a platform designed to bundle unlimited access to local e-scooters, bike-share, and micro-transit options within a defined residential zone for a single monthly fee.

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In July 2025, Uber introduced its 'Uber Local' integrated hub, a technology system that consolidates its Jump e-bikes, Uber Ride, and Uber Carshare services into a single app interface for streamlined, multi-modal trips within suburban communities.

In June 2025, Lyft announced a 'Make in the USA' partnership for its 'Lyft City' platform, deploying locally manufactured e-bikes and dedicated software to support city-led neighborhood mobility networks across the country.

Solutions Covered:

- Journey Planning & Management
- Payment
- Booking & Ticketing

Services Covered:

- Ride-Hailing
- Ride-Sharing
- Micromobility
- Public Transport
- Other Services

Propulsion Types Covered:

- Internal Combustion Engine
- Electric Vehicle
- CNG/LPG Vehicle

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Payment Types Covered:

- On-Demand
- Subscription-Based

Business Models Covered:

- B2B
- B2C
- Peer-To-Peer

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe

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  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific
- South America
  - Argentina
  - Brazil
  - Chile
  - Rest of South America
- Middle East & Africa
  - Saudi Arabia
  - UAE
  - Qatar
  - South Africa
  - Rest of Middle East & Africa

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What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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