

Subscription-Based Mobility Market Forecasts to 2034 – Global Analysis By Subscription Type (Single-vehicle Subscription and Multi-vehicle & Flexible Swap Models), Subscription Period, Vehicle Type, Fuel Type, Service Provider, End User and By Geography

<https://marketpublishers.com/r/S98B1618F648EN.html>

Date: April 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: S98B1618F648EN

Abstracts

According to Statistics MRC, the Global Subscription-Based Mobility Market is accounted for \$6.1 billion in 2026 and is expected to reach \$32.9 billion by 2034 growing at a CAGR of 23.4% during the forecast period. Subscription based mobility refers to a transport service model in which individuals pay a fixed recurring charge to use multiple mobility options like cars, bicycles, scooters, or transit services without owning them. It offers convenience, cost efficiency, and flexibility by combining maintenance, insurance, and usage expenses into a single plan. The approach encourages shared transport, reduces traffic congestion, and supports environmental sustainability. It is gaining popularity in urban regions because of high vehicle ownership costs and environmental awareness. Digital platforms enable easy booking, tracking, and payments, making mobility services more accessible and efficient worldwide in modern cities today globally widely.

According to McKinsey & Company, the global shared mobility market — including ride-hailing, car-sharing, and subscription services — is projected to reach nearly USD 1 trillion by 2030.

Market Dynamics:

Driver:

Cost efficiency and affordability

Affordability is a key factor encouraging the growth of subscription-based mobility because traditional vehicle ownership is expensive and involves multiple ongoing costs. Expenses such as repairs, insurance, fuel, and depreciation make owning a car financially challenging for many people. Subscription services address this issue by bundling all major costs into a fixed monthly fee, making transportation spending easier to manage. This model appeals to users who want predictable expenses and flexible access to vehicles without long-term financial obligations. It also helps individuals optimize their travel costs based on actual usage, making it a practical and economical solution for modern transportation needs.

Restraint:

Limited service availability and geographic coverage

Restricted geographic reach is a major challenge for subscription-based mobility services, as they are mostly available in large cities and developed urban centers. Rural and smaller towns often do not have the required infrastructure, fleet availability, or operational systems to support such services effectively. This uneven access limits the number of potential users who can benefit from subscription mobility. Expanding into new areas requires heavy investment in vehicles, logistics, and maintenance networks, which slows expansion efforts. People living outside metropolitan regions therefore experience limited access to these services, reducing overall market penetration and slowing the widespread adoption of subscription-based transportation models.

Opportunity:

Expansion of urban mobility solutions

The growth of urban mobility systems offers a strong opportunity for subscription-based transportation as cities expand and transportation networks become more congested. Increasing population density in urban areas creates demand for convenient, flexible, and space-efficient travel options. Subscription services can combine multiple transport modes such as cars, bicycles, and shared vehicles into integrated platforms. This allows companies to focus on high-demand metropolitan regions. Support from smart city programs and government initiatives further enhances adoption. As urban infrastructure continues to develop, subscription-based mobility is expected to play an important role

in creating efficient, sustainable, and interconnected transportation systems in cities worldwide.

Threat:

Intense market competition

Strong competition in the subscription-based mobility market poses a serious challenge as multiple players, including car manufacturers, ride-hailing firms, and startups, compete for customers. This leads to pricing pressure and reduced profit margins across the industry. Companies are forced to constantly improve services, introduce innovative features, and maintain competitive pricing to attract and retain users. Established automotive brands have the advantage of strong financial backing and customer trust, making it difficult for smaller firms to compete effectively. The presence of similar service offerings and aggressive promotional strategies further increases market saturation, limiting profitability and long-term stability for many providers.

Covid-19 Impact:

COVID-19 significantly affected the subscription-based mobility market in both negative and positive ways. In the early stages of the pandemic, strict lockdowns and travel restrictions reduced the use of shared and subscription transport services. Health concerns made users hesitant to use shared vehicles, causing a drop in revenue and low fleet utilization, with many services temporarily paused. However, as conditions improved, demand started to recover. Consumers showed greater interest in flexible and contactless mobility options due to economic uncertainty and changing travel habits. The adoption of digital platforms and safety measures helped restore confidence and supported gradual long-term growth in the market.

The single-vehicle subscription segment is expected to be the largest during the forecast period

The single-vehicle subscription segment is expected to account for the largest market share during the forecast period because it offers a simple and practical solution for individual users. It enables customers to access one vehicle through a monthly plan that includes expenses such as maintenance, insurance, and usage. This model is especially popular in cities where people seek affordable alternatives to owning a car without dealing with ownership responsibilities. Its easy structure helps service providers efficiently manage fleets and operations. The growing preference for

convenient and flexible transportation among urban commuters and working professionals continues to support the strong adoption of this subscription model worldwide.

The two-wheelers segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the two-wheelers segment is predicted to witness the highest growth rate because of its low cost, convenience, and strong suitability for city travel. These vehicles provide an economical and flexible alternative to cars and public transport, particularly in crowded urban areas with heavy traffic. Subscription services make two-wheelers more appealing by removing responsibilities like maintenance, insurance, and depreciation costs. This model is especially popular among students and working professionals who need efficient short-distance travel. Rising fuel costs and increasing adoption of electric scooters and bikes are further driving strong growth in this segment worldwide.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share because of strong purchasing power, advanced automotive industry presence, and early uptake of innovative mobility solutions. The region has robust digital infrastructure and high penetration of connected vehicles, enabling efficient subscription services. Leading companies in the United States are actively offering flexible mobility subscription models, boosting market growth. Strong demand from corporate users and urban commuters further supports expansion. In addition, favourable financing conditions and continuous investment in mobility technologies enhance regional dominance.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR because of rapid urban development, a rising middle-income population, and increasing need for cost-effective transport options. Key countries such as China, India, Japan, and South Korea are experiencing strong adoption of shared and subscription-based mobility services. Widespread smartphone usage and growing digital payment systems are further boosting market expansion. High traffic congestion and limited affordability of private vehicles are encouraging consumers to shift toward flexible mobility solutions. Government support for smart city projects and sustainable transport,

along with rising investments from global companies, is driving strong regional growth.

Key players in the market

Some of the key players in Subscription-Based Mobility Market include Porsche Drive, Cluno, Fair, Hertz My Car, Sixt+, Rsevv, BMW Group, Mercedes-Benz Mobility, Volkswagen AG, Porsche AG, Hertz Global Holdings, Sixt SE, FINN, Carvolution, Drive Fuze, Cocoon, Flexdrive and Loopit.

Key Developments:

In April 2026, BMW Group and Rimac Technology cooperate on innovative high-voltage battery for the BMW i7. The aim of the joint project is to bring the Gen6 technology developed by BMW for an innovative high-voltage storage system for more range and higher charging speed to the new all-electric BMW 7 Series Sedan.

In November 2025, Porsche and Michelin celebrate a legacy of design and innovation at Icons of Porsche 2025. The partnership continues to explore how design and innovation can shape the future of driving, as the brand joins thousands of enthusiasts and industry leaders for a weekend dedicated to creativity, performance and automotive excellence.

In August 2025, Volkswagen Group and XPeng Inc. are pleased to announce that, following the execution of Master Agreement on E/E Architecture Technical Collaboration, XPENG and the Volkswagen Group have accelerated the joint development of the industry-leading E/E Architecture at 'China Speed' and achieved key milestones.

Subscription Types Covered:

Single-vehicle Subscription

Multi-vehicle & Flexible Swap Models

Subscription Periods Covered:

Short-term (?12 months)

Long-term (>12 months)

Vehicle Types Covered:

Passenger Cars

Two-wheelers

Commercial Vehicles

Fuel Types Covered:

Internal Combustion Engine (ICE) Vehicles

Battery Electric Vehicles (BEVs)

Hybrid Vehicles

Service Providers Covered:

OEM-led Programs

Third-party Aggregator Platforms

End Users Covered:

Individual Consumers

Corporate Fleets

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

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

Subscription-Based Mobility Market Forecasts to 2034 – Global Analysis By Subscription Type (Single-vehicle Su...

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

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL SUBSCRIPTION-BASED MOBILITY MARKET, BY SUBSCRIPTION TYPE

- 5.1 Single-vehicle Subscription
- 5.2 Multi-vehicle & Flexible Swap Models

6 GLOBAL SUBSCRIPTION-BASED MOBILITY MARKET, BY SUBSCRIPTION PERIOD

- 6.1 Short-term (?12 months)
- 6.2 Long-term (>12 months)

7 GLOBAL SUBSCRIPTION-BASED MOBILITY MARKET, BY VEHICLE TYPE

- 7.1 Passenger Cars
- 7.2 Two-wheelers
- 7.3 Commercial Vehicles

8 GLOBAL SUBSCRIPTION-BASED MOBILITY MARKET, BY FUEL TYPE

- 8.1 Internal Combustion Engine (ICE) Vehicles
- 8.2 Battery Electric Vehicles (BEVs)
- 8.3 Hybrid Vehicles

9 GLOBAL SUBSCRIPTION-BASED MOBILITY MARKET, BY SERVICE PROVIDER

- 9.1 OEM-led Programs
- 9.2 Third-party Aggregator Platforms

10 GLOBAL SUBSCRIPTION-BASED MOBILITY MARKET, BY END USER

- 10.1 Individual Consumers
- 10.2 Corporate Fleets

11 GLOBAL SUBSCRIPTION-BASED MOBILITY MARKET, BY GEOGRAPHY

11.1 North America

11.1.1 United States

11.1.2 Canada

11.1.3 Mexico

11.2 Europe

11.2.1 United Kingdom

11.2.2 Germany

11.2.3 France

11.2.4 Italy

11.2.5 Spain

11.2.6 Netherlands

11.2.7 Belgium

11.2.8 Sweden

11.2.9 Switzerland

11.2.10 Poland

11.2.11 Rest of Europe

11.3 Asia Pacific

11.3.1 China

11.3.2 Japan

11.3.3 India

11.3.4 South Korea

11.3.5 Australia

11.3.6 Indonesia

11.3.7 Thailand

11.3.8 Malaysia

11.3.9 Singapore

11.3.10 Vietnam

11.3.11 Rest of Asia Pacific

11.4 South America

11.4.1 Brazil

11.4.2 Argentina

11.4.3 Colombia

11.4.4 Chile

11.4.5 Peru

11.4.6 Rest of South America

11.5 Rest of the World (RoW)

11.5.1 Middle East

11.5.1.1 Saudi Arabia

- 11.5.1.2 United Arab Emirates
- 11.5.1.3 Qatar
- 11.5.1.4 Israel
- 11.5.1.5 Rest of Middle East
- 11.5.2 Africa
 - 11.5.2.1 South Africa
 - 11.5.2.2 Egypt
 - 11.5.2.3 Morocco
 - 11.5.2.4 Rest of Africa

12 STRATEGIC MARKET INTELLIGENCE

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping
- 12.3 Product Evolution and Market Life Cycle Analysis
- 12.4 Channel, Distributor, and Go-to-Market Assessment

13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

- 13.1 Mergers and Acquisitions
- 13.2 Partnerships, Alliances, and Joint Ventures
- 13.3 New Product Launches and Certifications
- 13.4 Capacity Expansion and Investments
- 13.5 Other Strategic Initiatives

14 COMPANY PROFILES

- 14.1 Porsche Drive
- 14.2 Cluno
- 14.3 Fair
- 14.4 Hertz My Car
- 14.5 Sixt+
- 14.6 Revv
- 14.7 BMW Group
- 14.8 Mercedes-Benz Mobility
- 14.9 Volkswagen AG
- 14.10 Porsche AG
- 14.11 Hertz Global Holdings
- 14.12 Sixt SE

- 14.13 FINN
- 14.14 Carvolution
- 14.15 Drive Fuze
- 14.16 Cocoon
- 14.17 Flexdrive
- 14.18 Loopit

List Of Tables

LIST OF TABLES

Table 1 Global Subscription-Based Mobility Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Subscription-Based Mobility Market Outlook, By Subscription Type (2023-2034) (\$MN)

Table 3 Global Subscription-Based Mobility Market Outlook, By Single-vehicle Subscription (2023-2034) (\$MN)

Table 4 Global Subscription-Based Mobility Market Outlook, By Multi-vehicle & Flexible Swap Models (2023-2034) (\$MN)

Table 5 Global Subscription-Based Mobility Market Outlook, By Subscription Period (2023-2034) (\$MN)

Table 6 Global Subscription-Based Mobility Market Outlook, By Short-term (?12 months) (2023-2034) (\$MN)

Table 7 Global Subscription-Based Mobility Market Outlook, By Long-term (>12 months) (2023-2034) (\$MN)

Table 8 Global Subscription-Based Mobility Market Outlook, By Vehicle Type (2023-2034) (\$MN)

Table 9 Global Subscription-Based Mobility Market Outlook, By Passenger Cars (2023-2034) (\$MN)

Table 10 Global Subscription-Based Mobility Market Outlook, By Two-wheelers (2023-2034) (\$MN)

Table 11 Global Subscription-Based Mobility Market Outlook, By Commercial Vehicles (2023-2034) (\$MN)

Table 12 Global Subscription-Based Mobility Market Outlook, By Fuel Type (2023-2034) (\$MN)

Table 13 Global Subscription-Based Mobility Market Outlook, By Internal Combustion Engine (ICE) Vehicles (2023-2034) (\$MN)

Table 14 Global Subscription-Based Mobility Market Outlook, By Battery Electric Vehicles (BEVs) (2023-2034) (\$MN)

Table 15 Global Subscription-Based Mobility Market Outlook, By Hybrid Vehicles (2023-2034) (\$MN)

Table 16 Global Subscription-Based Mobility Market Outlook, By Service Provider (2023-2034) (\$MN)

Table 17 Global Subscription-Based Mobility Market Outlook, By OEM-led Programs (2023-2034) (\$MN)

Table 18 Global Subscription-Based Mobility Market Outlook, By Third-party Aggregator

Platforms (2023-2034) (\$MN)

Table 19 Global Subscription-Based Mobility Market Outlook, By End User (2023-2034) (\$MN)

Table 20 Global Subscription-Based Mobility Market Outlook, By Individual Consumers (2023-2034) (\$MN)

Table 21 Global Subscription-Based Mobility Market Outlook, By Corporate Fleets (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

I would like to order

Product name: Subscription-Based Mobility Market Forecasts to 2034 – Global Analysis By Subscription Type (Single-vehicle Subscription and Multi-vehicle & Flexible Swap Models), Subscription Period, Vehicle Type, Fuel Type, Service Provider, End User and By Geography

Product link: <https://marketpublishers.com/r/S98B1618F648EN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/S98B1618F648EN.html>