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Urban Micromobility-as-a-Service (MaaS) Market Forecasts to 2032 – Global Analysis By Vehicle Type (E-Scooters, E-Mopeds, Bicycles, Electric Skateboards, and Standing E-scooters), Business Model, Trip Type, Payment Model, End User and By Geography

https://marketpublishers.com/r/U0E4785882FEEN.html
Date: October 2025
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: U0E4785882FEEN

Abstracts

According to Stratistics MRC, the Global Urban Micromobility-as-a-Service (MaaS) Market is accounted for $217.6 billion in 2025 and is expected to reach $469.1 billion by 2032 growing at a CAGR of 11.6% during the forecast period. Urban Micromobility-as-a-Service (MaaS) is a transportation model providing short-term access to lightweight vehicles. This system offers shared, digitally-enabled mobility solutions like electric scooters, bicycles, and e-bikes for urban travel. Users typically locate, unlock, and pay for vehicles via a smartphone application. The service is characterized by its flexibility, allowing for point-to-point trips without fixed stations. It is designed for short-distance travel, functioning as a complement to public transit by addressing the 'first and last mile' of a user's journey within a city.

According to the International Transport Forum, micromobility-as-a-service adoption is accelerating due to smart city initiatives, offering sustainable, low-emission transport options for short-distance urban commutes and first-mile connectivity.

Market Dynamics:

Driver:

Supportive government sustainability initiatives

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Supportive government sustainability initiatives serve as a major driver for the Urban Micromobility-as-a-Service Market, reinforced by urban policies promoting low-emission and shared transportation modes. Governments worldwide are encouraging the adoption of e-bikes, e-scooters, and shared mobility networks to reduce congestion and carbon emissions. Subsidies, tax incentives, and smart mobility infrastructure projects are propelling large-scale deployment. As cities transition toward sustainable transportation ecosystems, micromobility solutions are becoming integral components of smart urban planning and last-mile connectivity frameworks across global markets.

Restraint:

High maintenance and fleet management costs

High maintenance and fleet management costs present a significant restraint in the Urban Micromobility-as-a-Service Market. Frequent equipment wear, vandalism, and battery degradation increase operational expenses. Additionally, balancing vehicle distribution across dynamic demand zones requires substantial investment in logistics and workforce management. Fleet operators must continuously upgrade hardware and software to ensure safety compliance and reliability. These recurring costs limit scalability, particularly for startups and small operators, necessitating innovations in predictive maintenance, modular design, and energy-efficient operations to maintain profitability.

Opportunity:

Integration with smart city transport systems

Integration with smart city transport systems offers a transformative opportunity for the Urban Micromobility-as-a-Service Market. By linking e-scooter and e-bike networks with public transit platforms, cities can create seamless, multimodal mobility ecosystems. Data integration through IoT and AI enables real-time coordination between transport services, optimizing route efficiency and reducing traffic congestion. Such partnerships enhance commuter convenience while supporting environmental goals. This convergence of digital infrastructure and shared mobility establishes micromobility as a cornerstone of next-generation sustainable urban transportation models worldwide.

Threat:

Safety concerns and accident liabilities

Safety concerns and accident liabilities represent a persistent threat to the Urban Micromobility-as-a-Service Market. Increasing incidents involving e-scooters and e-bikes raise public scrutiny and regulatory challenges. Operators face insurance complexities, liability claims, and reputational risks stemming from inadequate infrastructure or unsafe rider behavior. These concerns can lead to stricter city regulations and restricted operational zones. To mitigate risks, industry stakeholders are investing in rider education, advanced braking systems, and AI-based collision avoidance technologies to enhance public safety and compliance.

Covid-19 Impact:

The Covid-19 pandemic initially disrupted micromobility services due to lockdown restrictions but later accelerated their recovery as consumers sought contactless and personal transport options. Urban commuters favored e-scooters and e-bikes as safe, socially distanced alternatives to public transit. Operators adapted by deploying sanitization measures and flexible rental models. Post-pandemic, cities recognized micromobility's role in resilient urban transport, integrating it into recovery strategies. Consequently, Covid-19 reshaped consumer mobility patterns, strengthening long-term adoption of shared, low-emission micro-transport solutions.

The E-scooters segment is expected to be the largest during the forecast period

The E-scooters segment is expected to account for the largest market share during the forecast period, resulting from widespread adoption driven by convenience, affordability, and environmental compatibility. Compact design, easy docking, and short-range efficiency make e-scooters ideal for last-mile connectivity. Urban consumers increasingly prefer them for commuting and leisure travel. Operators are expanding fleets and integrating IoT systems for real-time monitoring and performance analytics. These factors collectively reinforce e-scooters as the dominant segment within the evolving urban micromobility ecosystem.

The station-based segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the station-based segment is predicted to witness the highest growth rate, propelled by city regulations favoring organized and safe parking solutions. Station-based systems reduce clutter, improve fleet utilization, and enhance service predictability. Integration with public transit hubs facilitates multimodal connectivity. Moreover, centralized charging and maintenance operations minimize downtime. Supported by smart docking technology and sustainability goals, station-based micromobility models are rapidly expanding, especially in cities seeking structured, space-efficient, and eco-friendly urban transport frameworks.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, attributed to dense urbanization, rapid digitalization, and government investments in clean transportation. Countries like China, Japan, and South Korea are leading in e-scooter sharing infrastructure and smart mobility integration. Increasing smartphone penetration and app-based payment systems support market expansion. Furthermore, favorable regulatory policies and growing consumer adoption of shared vehicles make Asia Pacific the dominant hub for micromobility innovation and deployment.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR associated with rising demand for sustainable commuting alternatives and robust investment in micro-transport infrastructure. The United States and Canada are witnessing rapid adoption of e-scooter and e-bike sharing programs supported by city partnerships. Advancements in charging networks, data analytics, and user safety technologies further strengthen growth. North America’s commitment to decarbonizing short-distance mobility positions it as a high-growth region within the global MaaS landscape.

Key players in the market

Some of the key players in Urban Micromobility-as-a-Service (MaaS) Market include Lime, Bird, Tier, Dott, Voi, Spin, Helbiz, Bolt, Uber Jump, Lyft, Neuron, Superpedestrian, Razor, Wind Mobility, Biketown, and Citi Bike.

Key Developments:

In June 2025, Tier introduced the 'Tier Universal' e-scooter platform, an accessible vehicle design featuring a wider deck for stability, a seated option, and auditory guidance to support riders with varying mobility needs.

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In March 2025, Neuron Mobility expanded its 'Rider Accountability' safety program, incorporating mandatory in-app tutorials and helmet selfie verification for new users in all its North American markets to promote safer riding practices.

In May 2025, Lime launched 3,000 LimeGliders (new seated scooters) in Seattle, making it the first city globally to receive this option, which supplements their e-bike and stand-up scooter fleet.

Vehicle Types Covered:

- E-Scooters
- E-Mopeds
- Bicycles
- Electric Skateboards
- Standing E-scooters

Business Models Covered:

- Station-Based
- Free-Floating
- Hybrid Model

Trip Types Covered:

- First-Mile/Last-Mile Connectivity
- Short-Distance Commute
- Leisure & Recreational Trips

Errand Running

Payment Models Covered:

Pay-Per-Ride

Subscription

Tiered Pricing

End Users Covered:

Individual Commuters

Tourists & Visitors

Students

Corporate Programs (B2B2C)

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

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- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- 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

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Qatar

South Africa

Rest of Middle East & 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 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

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presence, and strategic alliances

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