

Passenger Cars Shared Mobility Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Propulsion Type (ICE, Electric), By Mobility Type (Ride Sharing, Vehicle Leasing, Private), By Region, Competition

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Abstracts

Global Passenger Cars Shared Mobility Market has valued at USD 93 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 10.7% through 2028. The passenger car shared mobility market represents a dynamic and evolving sector within the broader transportation landscape. This market is characterized by the concept of sharing vehicles, where individuals can access cars on a short-term basis, typically through smartphone applications, without the burdens of ownership. It has gained significant traction in urban areas worldwide, driven by factors such as urbanization, sustainability concerns, technological advancements, and changing consumer preferences. Shared mobility services offer users a cost-effective and convenient alternative to owning a private car, particularly in densely populated urban centers. They align with the growing emphasis on sustainability and environmental responsibility, with many operators incorporating electric vehicles into their fleets to reduce emissions and contribute to cleaner air in cities.

Key Market Drivers

Urbanization and Population Density

One of the primary drivers of the passenger car shared mobility market is the global trend toward urbanization and the resulting increase in population density in cities. As more people move to urban areas, cities face significant challenges related to traffic congestion, limited parking space, and air pollution. These challenges have led

individuals to seek alternative transportation solutions that are more efficient and sustainable. Shared mobility services, including ridesharing and car-sharing, have gained popularity in densely populated urban centers as they offer convenient alternatives to private car ownership. With high population density, the demand for transportation options that reduce the number of vehicles on the road and minimize parking challenges has driven the growth of passenger car shared mobility.

Furthermore, shared mobility services align with the desire of urban residents to reduce the costs and inconveniences associated with owning a private car in densely populated areas. As cities continue to grow and evolve, the appeal of shared mobility services is expected to increase, making them an integral part of urban transportation ecosystems.

Technological Advancements and Connectivity

Advancements in technology and connectivity have played a pivotal role in driving the growth of the passenger car shared mobility market. The widespread availability of smartphones and the development of user-friendly mobile applications have made it easier than ever for individuals to access and use shared mobility services. Mobile apps allow users to locate, reserve, and unlock shared vehicles with just a few taps on their smartphones. Real-time vehicle tracking, digital payment options, and integrated navigation systems enhance the user experience, making shared mobility services more attractive and convenient. Furthermore, the integration of telematics and Internet of Things (IoT) technologies in shared vehicles enables operators to monitor and manage their fleets efficiently. These technologies provide valuable data on vehicle usage, maintenance needs, and user behavior, allowing operators to optimize their operations and provide better service.

Environmental Awareness and Sustainability

Growing environmental awareness and concerns about climate change have become significant drivers of the passenger car shared mobility market. As individuals and communities seek to reduce their carbon footprints, there is a growing demand for transportation solutions that are more sustainable and eco-friendlier. Shared mobility services, particularly those that incorporate electric and hybrid vehicles into their fleets, align with sustainability goals. Electric vehicles (EVs) are known for their lower emissions and reduced environmental impact compared to traditional internal combustion engine (ICE) vehicles. By offering electric or hybrid vehicles as part of their shared fleets, operators contribute to cleaner air and a reduction in greenhouse gas emissions. Moreover, shared mobility services promote the efficient use of vehicles,

reducing the overall number of cars on the road and the associated pollution and congestion. This has a positive impact on urban air quality and can contribute to achieving environmental targets set by cities and governments.

Cost Savings and Affordability

Economic considerations play a significant role in driving the passenger car shared mobility market. The cost of owning and maintaining a private car, including expenses related to fuel, insurance, parking, and maintenance, can be substantial. Shared mobility services provide an attractive alternative for individuals looking to reduce their transportation costs. Shared mobility users can access vehicles on a pay-as-you-go basis, eliminating the need for large upfront costs associated with car ownership. This pay-per-use model is particularly appealing to budget-conscious individuals who may not require a private vehicle for daily use but still need transportation options. Furthermore, shared mobility services often offer competitive pricing compared to traditional taxi services or ridesharing platforms. The availability of various vehicle options, including economy cars and larger vehicles for group travel, allows users to choose the most cost-effective option for their specific needs.

Changing Mobility Preferences and Behavior

Changing mobility preferences and behavior patterns among consumers have had a significant impact on the growth of the passenger car shared mobility market. Many urban residents and millennials are reevaluating their transportation choices and shifting away from traditional car ownership models. The desire for more flexible and convenient transportation options, coupled with the recognition that private cars often remain parked and underutilized, has led individuals to explore shared mobility alternatives. Shared mobility services offer the flexibility to use a car only when needed, without the responsibilities and costs associated with ownership. Moreover, the rise of the sharing economy and the acceptance of the concept of 'access over ownership' have influenced people's attitudes toward transportation. Shared mobility aligns with the trend of valuing access to goods and services over the permanent ownership of assets.

Key Market Challenges

Economic Viability and Profitability:

One of the fundamental challenges facing the passenger car shared mobility market is achieving economic viability and long-term profitability. Operating a shared mobility

service involves substantial upfront investments in vehicle acquisition, maintenance, fleet management, insurance, and technology infrastructure. The costs associated with maintaining a reliable and efficient fleet can be substantial, making it challenging for operators to achieve profitability, particularly in highly competitive markets. Profitability is further complicated by pricing pressures and the need to strike a balance between affordability for users and the financial sustainability of the service. Operators often need to rely on venture capital funding to cover operational losses and expand their presence, which may not be a sustainable long-term strategy.

Regulatory Complexity and Fragmentation

The passenger car shared mobility market operates within a regulatory landscape that can vary significantly from one jurisdiction to another. This regulatory complexity and fragmentation present a substantial challenge for operators looking to expand their services across different regions and countries. Regulations affecting shared mobility services cover a wide range of areas, including safety standards, vehicle licensing, insurance requirements, data privacy, taxation, and driver background checks. Navigating this intricate web of rules and requirements is a resource-intensive task for operators and can lead to increased compliance costs. Efforts to standardize regulations and create a more predictable and consistent regulatory environment for passenger car shared mobility services are ongoing but have not been universally successful. This regulatory complexity remains a significant barrier to the industry's growth and expansion.

Technological Advancements and Integration

The rapid pace of technological advancements presents both opportunities and challenges for the passenger car shared mobility market. On one hand, technology has enabled the development of user-friendly mobile applications, real-time vehicle tracking, and convenient payment systems that enhance the user experience. On the other hand, the integration of emerging technologies, such as autonomous vehicles, presents complex challenges. Autonomous vehicles have the potential to reshape the shared mobility landscape by reducing the need for human drivers and offering 24/7 availability. However, integrating autonomous vehicles into shared mobility fleets requires substantial investments in research, development, and safety testing. Moreover, technological advancements also bring concerns related to data security and privacy. Shared mobility services collect a wealth of data about passengers and their travel patterns, raising questions about how this data is used, stored, and protected. Compliance with data protection regulations, such as the General Data Protection

Regulation (GDPR) in Europe, is a critical consideration for operators.

Behavioral and Cultural Shifts

The success of passenger car shared mobility services hinges on users adopting a new way of thinking about transportation. Shifting consumer behavior away from car ownership in favor of shared mobility represents a significant cultural change. While this shift is underway in many urban areas, it can be challenging to accelerate and sustain. Car ownership has long been associated with personal freedom, convenience, and status. Convincing individuals to relinquish their private cars in favor of shared mobility services requires overcoming deeply ingrained cultural perceptions and habits. Some potential users may remain skeptical about the reliability, cleanliness, and safety of shared vehicles. Moreover, the reliance on shared mobility often necessitates a change in travel behavior, such as embracing walking, cycling, and public transit for shorter journeys. Operators must consider the accessibility and integration of their services with other modes of transportation to encourage seamless multimodal travel.

Competition and Market Saturation

The passenger car shared mobility market has attracted a growing number of players, leading to increased competition in many urban areas. This competition can result in market saturation, where multiple operators vie for the same pool of potential users. Market saturation poses several challenges. It can lead to underutilized fleets, reduced profitability, and intense pricing pressures as operators strive to attract and retain customers. Overly aggressive competition may lead to unsustainable practices, including pricing wars that erode the economic viability of shared mobility services. Furthermore, market saturation can result in congestion, as numerous shared vehicles vie for limited parking spaces and roadway access. This congestion can have negative implications for urban mobility and user experience, potentially leading to regulatory interventions to manage the number of shared vehicles. Operators must carefully plan their market entry and expansion strategies, taking into account factors such as local demand, competition, and pricing dynamics. Moreover, differentiation through service quality, user experience, and technology integration is crucial for operators to thrive in a competitive landscape.

Environmental Considerations and Sustainability

While passenger car shared mobility services have the potential to reduce individual car ownership and promote more sustainable transportation modes, they also face

environmental challenges. Shared vehicles, particularly those powered by internal combustion engines, can contribute to traffic congestion, emissions, and air pollution if not managed properly. Efforts to maintain and clean shared vehicles, including fueling or charging, can result in additional vehicle movements and emissions. Balancing the environmental benefits of shared mobility with operational realities is a complex challenge.

Key Market Trends

Electrification and Sustainable Mobility:

One of the most significant trends in the passenger car shared mobility market is the increasing adoption of electric vehicles (EVs) and a growing commitment to sustainability. Electric vehicles offer numerous advantages for shared mobility services, including lower operating costs, reduced emissions, and quieter, more environmentally friendly transportation. Shared mobility operators are increasingly incorporating electric cars into their fleets, aligning with broader sustainability goals and environmental awareness. These EVs are not only eco-friendly but also contribute to improving air quality in urban areas, where pollution is a growing concern. Additionally, electric car-sharing services are gaining popularity in many cities, offering users access to clean and efficient transportation on a pay-per-use basis. The convenience of EV charging infrastructure, coupled with advancements in battery technology, has made electric car sharing a viable and attractive option for both operators and users.

Mobility as a Service (MaaS) Integration:

Mobility as a Service (MaaS) is a growing trend that seeks to integrate various transportation options into a single, seamless platform accessible through a mobile app. MaaS platforms aim to provide users with comprehensive, door-to-door transportation solutions that combine shared mobility services, public transit, ride-sharing, and other modes of transportation. In the context of passenger car shared mobility, MaaS integration is transforming the user experience. Users can plan, book, and pay for a combination of transportation options through a single app, reducing the need for multiple apps or physical tickets. This integration enhances convenience, simplifies the travel planning process, and encourages users to consider shared mobility as part of their daily commute. MaaS platforms also enable operators to optimize their services by analyzing user preferences and travel patterns, which can lead to more efficient fleet management and improved service quality. By providing a holistic transportation solution, MaaS integration is enhancing the attractiveness of passenger car shared

mobility services in the broader urban mobility landscape.

Autonomous Vehicles and Mobility on Demand:

The development and deployment of autonomous vehicles (AVs) are poised to revolutionize the passenger car shared mobility market. AVs have the potential to reshape the way shared mobility services are provided, offering users mobility on demand without the need for human drivers. Autonomous shared mobility services promise several advantages, including 24/7 availability, reduced operating costs (as driver salaries are eliminated), improved safety through advanced sensor technology, and enhanced accessibility for individuals with limited mobility. While fully autonomous vehicles are still in the testing and development phase, pilot programs and partnerships between shared mobility operators and AV technology companies are underway. These programs offer a glimpse into the future of mobility on demand, where users can summon a shared autonomous vehicle through a mobile app for on-demand transportation. As AV technology matures and regulatory frameworks adapt to accommodate autonomous vehicles, passenger car shared mobility is expected to undergo a significant transformation, with AVs becoming an integral part of shared fleets.

Micro mobility and Last-Mile Solutions:

Micro mobility solutions, such as shared electric scooters and bicycles, have gained significant traction within the passenger car shared mobility market, offering practical last-mile transportation options. These compact and eco-friendly vehicles are particularly well-suited for short trips within urban areas and for bridging the gap between public transit stops and final destinations.

Shared micro mobility services provide users with convenient and affordable options for covering short distances, reducing the need for personal car use or ridesharing services for short trips. They contribute to reduced congestion, improved air quality, and reduced carbon emissions, aligning with sustainability objectives. In addition to electric scooters and bicycles, shared electric kick scooters and electric mopeds have become increasingly popular in many cities. Operators are expanding their fleets to include these micro mobility options, offering users a diverse range of transportation choices.

Data-Driven Insights and Personalization

Data-driven insights and personalization are becoming essential components of the

passenger car shared mobility market. Operators are leveraging data analytics to gain a deeper understanding of user behavior, preferences, and travel patterns. This data-driven approach allows operators to tailor their services to meet the specific needs and expectations of users. Through the analysis of user data, operators can optimize fleet distribution, pricing models, and vehicle availability. They can also identify peak usage times, popular routes, and user demographics, which inform marketing strategies and service expansion plans. Moreover, personalization enhances the user experience. Operators are using data to offer personalized recommendations, route planning, and incentives to encourage user loyalty. Customized services and targeted promotions contribute to a more engaging and user-centric shared mobility experience.

Segmental Insights

Mobility Type Analysis

The market is divided into three categories according to service type: ride-hailing, car leasing, and private. During the mobility as a service market forecast period, the ride-hailing segment is predicted to rule the market. One of the key factors driving the demand for the ride-hailing industry is the variety of booking options and comfort provided by these services. Another factor influencing the market is how much easier ride-hailing services make it to pick up and drop off passengers than traditional taxis.

Regional Insights

Europe, South America, Asia Pacific, North America, the Middle East, and Africa are among the areas studied for the market. Asia Pacific has emerged as the largest market for the worldwide Passenger Cars Shared Mobility industry, in 2022. China leads the global market for shared transportation. Around 33% of Chinese choose Passenger Cars Shared Mobility as a means of transportation, with private automobiles coming in second. In addition, they want to transition to robotaxi and shuttles in the future. Didi Chuxing of China and Uber of the United States are the biggest ride-hailing Passenger Cars Shared Mobility firms, accounting for over 40% of all Passenger Cars Shared Mobility reservations. In terms of revenue, the Asia Pacific area's Passenger Cars Shared Mobility market developed at a considerable rate. Ride sharing and ride sourcing services are popular in China, India, and ASEAN nations, which boosts the industry in the region. Service providers in Asia Pacific, such as OLA, UBER, Grab SG, and DIDI Chuxing, control a sizable portion of the Passenger Cars Shared Mobility industry. Furthermore, increased urban population, rising working-class customers, and overcrowded public transport are some of the primary elements driving demand for

Passenger Cars Shared Mobility solutions. Furthermore, an increase in the number of daily commuters across the region, as well as a drop in the number of automobiles per thousand persons, are important variables driving the demand for shared transportation.

Recent Developments

Uber Technologies Inc. announced the debut of UberX Share in June 2022, which provides shared rides in New York, San Francisco, Chicago, Los Angeles, Portland, Phoenix, Pittsburgh, San Diego, and Indianapolis in the United States. The business intends to expand UberX Share, which allows users to share a ride, save money, remain on schedule, and make sustainable decision.

In June 2022, IFC, the World Bank Group's private sector arm, struck a deal with BlaBlaCar to invest around US\$ 15 million to assist Passenger Cars Shared Mobility platform expansion across Brazil and provide access to environmentally friendly, accessible, and inexpensive travel.

Key Market Players

Uber Technologies Inc.

ANI Technologies Pvt. Ltd.

Lyft, Inc.

Careem

Bolt Technology O?

Gett

Enterprise Holdings Inc.

Europcar

Curb Mobility

BlaBla Car

Report Scope:

In this report, the Global Passenger Cars Shared Mobility Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Passenger Cars Shared Mobility Market, By Propulsion Type:

ICE

Electric

Passenger Cars Shared Mobility Market, By Mobility Type:

Ride Sharing

Vehicle Leasing

Private

Passenger Cars Shared Mobility Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Passenger Cars Shared Mobility Market.

Available Customizations:

Global Passenger Cars Shared Mobility Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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