

# **Shared Mobility Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028**

## **Segmented By Vehicle Type (Two Wheeler, Passenger Car), By Propulsion Type (ICE, Electric), By Mobility Type (Ride Sharing, Vehicle Leasing, Private), By Regional, Competition**

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### **Abstracts**

The Global Shared Mobility Market, valued at USD 163 billion in 2022, is poised for robust growth in the forecast period, with a projected CAGR of 14.7% through 2028. This market is currently undergoing a significant transformation, revolutionizing how people access transportation services. It is characterized by the sharing of vehicles and rides and has experienced substantial growth in recent years, driven by a combination of factors such as urbanization, evolving consumer preferences, technological advancements, environmental concerns, and regulatory support.

Shared mobility encompasses a diverse range of services, including ridesharing, car sharing, bike sharing, scooter sharing, and emerging forms of shared autonomous mobility. These services offer users more flexible and cost-effective alternatives to traditional car ownership, reducing the reliance on private vehicle ownership in urban areas.

The rapid urbanization of the global population has been a major driver of the growth of shared mobility services. As more people migrate to cities, issues such as traffic congestion, air pollution, and parking difficulties become increasingly pronounced. Shared mobility presents a viable solution by offering convenient transportation options that mitigate the need for private vehicles on the road. This trend is particularly noticeable in densely populated urban centers, where residents are actively seeking

alternatives to conventional car ownership.

## Key Market Drivers

### Urbanization and Congestion Relief:

The process of urbanization has led to a surge in global urban populations. As cities become increasingly crowded, traffic congestion and pollution have become pervasive challenges. Shared mobility solutions present a practical and sustainable response to these issues. By offering alternatives to private vehicle ownership, shared mobility reduces the number of cars on the road, mitigating congestion and its associated problems. It promotes more efficient and eco-friendly transportation systems, which are essential for the well-being of urban environments.

### Changing Consumer Preferences:

A significant driver behind the growth of shared mobility is the changing preferences of consumers, particularly among younger generations. Millennials and Generation Z, who prioritize experiences over possessions, have demonstrated a decreasing interest in car ownership. Instead, they favor on-demand, app-based mobility services that align with their digital lifestyles. The convenience and cost-effectiveness of shared mobility options like ride sharing, bike sharing, and scooter sharing make them particularly appealing to these demographics. This shift in consumer behavior is reshaping the transportation landscape, with shared mobility emerging as a primary choice for urban travel.

### Technological Advancements:

The shared mobility market's rapid growth owes much to technological advancements. Mobile apps, GPS tracking, and real-time data optimization have revolutionized the way people access and utilize transportation services. Smartphone applications allow users to easily book rides, locate nearby vehicles, and make payments, all from the convenience of their devices. Furthermore, advanced data analytics and algorithms optimize vehicle allocation, reducing wait times and enhancing overall user experiences. These technological innovations have made shared mobility more accessible, efficient, and user-friendly, driving its widespread adoption.

### Environmental Concerns and Sustainability:

Growing environmental awareness and concerns about air pollution, greenhouse gas

emissions, and climate change are significant drivers pushing shared mobility to the forefront. Many shared mobility providers are making conscious efforts to incorporate eco-friendly options into their fleets. This includes the adoption of electric vehicles (EVs), hybrid cars, and other low-emission transportation modes. By doing so, shared mobility not only reduces individual car emissions but also encourages more sustainable transportation choices. Governments and environmental organizations support these initiatives, providing incentives for both providers and users to opt for cleaner shared mobility options, aligning with global sustainability goals.

#### Regulatory Support and Policy Initiatives:

Governments and regulatory bodies worldwide are increasingly recognizing the benefits of shared mobility in addressing urban mobility challenges. To foster the growth of shared mobility, many governments have introduced policies and regulations that support and facilitate these services. Some cities have designated dedicated lanes or parking areas for ride sharing or carsharing vehicles. Others have implemented pricing mechanisms to encourage shared rides and discourage single-occupancy vehicles. These regulatory changes promote the development of shared mobility and incentivize users to opt for more sustainable transportation options.

#### Collaboration and Partnerships:

Collaboration between shared mobility providers and various stakeholders is another significant driver. Partnerships between shared mobility companies and public transit agencies, for instance, create seamless, multi-modal transportation networks. This integration allows users to plan and pay for entire journeys, combining shared mobility with traditional public transportation modes like buses and trains. Such partnerships enhance the attractiveness of shared mobility services by providing users with comprehensive and efficient transportation solutions, further driving market growth.

#### Economic Considerations:

Economic factors play a pivotal role in the growth of shared mobility. Shared mobility services often offer more cost-effective alternatives to private car ownership. The affordability factor is particularly appealing, especially in urban areas where the costs of car ownership, including parking, insurance, and maintenance, can be high. Many consumers find that shared mobility options, like ride sharing and bike sharing, allow them to access transportation when needed without the substantial financial burden of owning a vehicle. This economic advantage has expanded the market's appeal and

contributed to its continued growth.

## Key Market Challenges

### Regulatory Complexity and Compliance:

One of the foremost challenges for shared mobility providers is navigating the complex regulatory landscape. Regulations governing transportation services, safety standards, data privacy, and employment relationships can vary significantly between regions and countries. Compliance with these regulations can be a complex and costly endeavor. For instance, ridesharing platforms often face legal battles and regulatory hurdles related to driver classification (as independent contractors or employees), insurance requirements, and licensing. Navigating these legal and regulatory complexities requires substantial resources and expertise.

### Safety Concerns and Liability Issues:

Safety is a paramount concern in shared mobility. Ensuring the safety of both passengers and drivers is a critical challenge. Ridesharing and other shared mobility services must implement robust safety protocols, including background checks for drivers, vehicle inspections, and incident response mechanisms. Liability issues can be particularly complex in the event of accidents or incidents involving shared mobility vehicles. Determining responsibility and insurance coverage can be contentious and legally challenging, requiring careful management and compliance with relevant regulations.

### Labor Rights and Fair Compensation:

Shared mobility providers often face scrutiny and legal challenges related to labor rights and fair compensation for drivers. The classification of drivers as independent contractors rather than employees has been a contentious issue in many regions. Some argue that drivers should receive benefits and protections akin to traditional employees, including minimum wages, healthcare, and workers' compensation. Balancing the need for affordability and flexibility for drivers with fair compensation and labor rights remains a complex and ongoing challenge.

### Market Competition and Consolidation:

The shared mobility market is highly competitive, with numerous startups and

established companies vying for market share. This intense competition can lead to price wars and lower profit margins, making it challenging for providers to achieve sustainable profitability. Additionally, market consolidation is a trend, with larger companies acquiring or merging with smaller competitors to gain market dominance. Navigating this competitive landscape requires innovation, differentiation, and strategic partnerships to remain viable.

#### Infrastructure Limitations:

Infrastructure limitations, particularly in developing regions, can hinder the expansion of shared mobility services. Inadequate road networks, parking facilities, and public transportation options can limit the feasibility and convenience of shared mobility solutions. For instance, bike sharing and scooter sharing services may struggle to operate effectively in cities with inadequate bike lanes and designated parking areas. Shared mobility providers must work closely with local authorities and invest in infrastructure improvements to address these limitations.

#### Consumer Trust and Security:

Building and maintaining consumer trust is crucial in the shared mobility market. Instances of safety breaches, fraud, or privacy concerns can erode trust in these services. Users must feel confident that their personal information is secure, their payments are processed safely, and their journeys are free from safety risks. Shared mobility providers must invest in robust security measures, data protection protocols, and transparency initiatives to build and maintain consumer trust.

#### Technological Challenges and Reliability:

Shared mobility services heavily rely on technology platforms to connect users with vehicles, facilitate payments, and optimize operations. Technical glitches, app downtime, or cybersecurity threats can disrupt services and frustrate users. Maintaining the reliability and resilience of technology infrastructure is a continual challenge. Additionally, as shared mobility services explore emerging technologies like electric and autonomous vehicles, they must address technical challenges related to vehicle maintenance, charging infrastructure, and vehicle autonomy to ensure a seamless and reliable user experience.

#### Key Market Trends

### Electrification and Sustainable Mobility:

A prominent trend in shared mobility is the increasing adoption of electric vehicles (EVs) and a focus on sustainability. Shared mobility providers are transitioning their fleets to electric or hybrid vehicles to reduce carbon emissions and promote eco-friendly transportation options. This trend aligns with global environmental goals and demonstrates a commitment to reducing the ecological footprint of shared mobility services.

### Multi-Modal Integration:

Multi-modal integration is gaining traction to provide users with seamless, end-to-end transportation solutions. Shared mobility providers are collaborating with public transit agencies and other transportation modes such as buses, trains, and even micro mobility services like bike sharing and scooter sharing. These partnerships enable users to plan and pay for entire journeys, making shared mobility a convenient and comprehensive part of urban transportation networks.

### Micro-Mobility and Last-Mile Solutions:

Micro-mobility services, including bike sharing and scooter sharing, have seen significant growth. They address the 'last-mile' challenge, bridging the gap between public transportation hubs and final destinations. Users appreciate the convenience of these services for short trips within cities. Many shared mobility providers have incorporated micro-mobility options into their platforms or have acquired specialized micro-mobility startups to offer diverse transportation choices.

### Shared Autonomous Mobility:

The development and deployment of autonomous vehicles (AVs) are gradually becoming a part of the shared mobility landscape. While widespread adoption is still on the horizon, pilot programs and testing are underway in various regions. Shared autonomous mobility has the potential to further reduce transportation costs and enhance accessibility. However, it comes with its own set of technological, regulatory, and safety challenges that must be addressed for successful implementation.

### Subscription-Based Models:

Subscription-based models are gaining popularity in shared mobility. Instead of paying



per ride, users can subscribe to monthly plans that offer unlimited access to various transportation services within a defined area or network. This model enhances user loyalty and encourages more frequent use of shared mobility services while providing predictable revenue streams for providers.

#### Data-Driven Insights and Personalization:

Shared mobility providers are increasingly relying on data analytics and artificial intelligence to optimize their services. They collect and analyze vast amounts of data related to user behavior, traffic patterns, and vehicle utilization. This data-driven approach helps providers improve operations, enhance user experiences, and personalize services. For instance, algorithms may suggest optimal routes or predict peak demand times, ensuring efficient resource allocation.

#### Evolving Business Models and Diversification:

Shared mobility providers are exploring new business models and diversifying their offerings to remain competitive and adapt to changing user needs. Some providers have expanded beyond ride sharing into areas like food delivery or parcel delivery services. Additionally, innovative approaches such as peer-to-peer car sharing, where individuals can share their privately-owned vehicles, are emerging. These evolving business models reflect a commitment to innovation and flexibility within the shared mobility market.

#### Segmental Insights

##### Vehicle Type Analysis

Cars will dominate segment growth, but two-wheelers will grow at the fastest CAGR. Cars are predicted to dominate the Shared Mobility industry and grab the largest revenue share. The segment's dominance is likely to continue during the projection period, owing to the increasing popularity of four-wheelers due to their capacity to service several consumers at the same time. Furthermore, the growing EV fleet among the major companies is likely to drive segmental growth even further. After a user becomes acclimated to electric cars, they would see that the cost of travel per km is 4-5 times cheaper than that of its gas equivalent. Due to rising urbanisation, two-wheelers are predicted to expand at the quickest CAGR throughout the projection period.

#### 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 shared mobility industry, in 2022. China leads the global market for shared transportation. Around 33% of Chinese choose 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 shared mobility firms, accounting for over 40% of all shared mobility reservations. In terms of revenue, the Asia Pacific area's 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 shared mobility industry. Furthermore, increased urban population, rising working-class customers, and overcrowded public transport are some of the primary elements driving demand for 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.

### Key Market Players

Uber Technologies Inc.

ANI Technologies Pvt. Ltd.

Lyft, Inc.

Careem

Bolt Technology O?

Gett

Enterprise Holdings Inc.

Europcar

Curb Mobility



BlaBlaCar

Report Scope:

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

Shared Mobility Market, By Vehicle Type:

Two Wheeler

Passenger Car

Shared Mobility Market, By Propulsion Type:

ICE

Electric

Shared Mobility Market, By Mobility Type:

Ride Sharing

Vehicle Leasing

Private

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 Shared Mobility Market.

Available Customizations:

Global 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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    - 10.3.4.2.3. By Mobility Type Market Share Analysis

## **11. SWOT ANALYSIS**

- 11.1. Strength
- 11.2. Weakness
- 11.3. Opportunities
- 11.4. Threats

## **12. MARKET DYNAMICS**

- 12.1. Market Drivers

## 12.2. Market Challenges

# 13. MARKET TRENDS AND DEVELOPMENTS

## 14. COMPETITIVE LANDSCAPE

### 14.1. Company Profiles (Up to 10 Major Companies)

#### 14.1.1. Uber Technologies Inc.

##### 14.1.1.1. Company Details

##### 14.1.1.2. Key Product Offered

##### 14.1.1.3. Financials (As Per Availability)

##### 14.1.1.4. Recent Developments

##### 14.1.1.5. Key Management Personnel

#### 14.1.2. Careem

##### 14.1.2.1. Company Details

##### 14.1.2.2. Key Product Offered

##### 14.1.2.3. Financials (As Per Availability)

##### 14.1.2.4. Recent Developments

##### 14.1.2.5. Key Management Personnel

#### 14.1.3. Lyft, Inc.

##### 14.1.3.1. Company Details

##### 14.1.3.2. Key Product Offered

##### 14.1.3.3. Financials (As Per Availability)

##### 14.1.3.4. Recent Developments

##### 14.1.3.5. Key Management Personnel

#### 14.1.4. ANI Technologies Pvt. Ltd.

##### 14.1.4.1. Company Details

##### 14.1.4.2. Key Product Offered

##### 14.1.4.3. Financials (As Per Availability)

##### 14.1.4.4. Recent Developments

##### 14.1.4.5. Key Management Personnel

#### 14.1.5. Bolt Technology O?

##### 14.1.5.1. Company Details

##### 14.1.5.2. Key Product Offered

##### 14.1.5.3. Financials (As Per Availability)

##### 14.1.5.4. Recent Developments

##### 14.1.5.5. Key Management Personnel

#### 14.1.6. Europcar

##### 14.1.6.1. Company Details



- 14.1.6.2. Key Product Offered
- 14.1.6.3. Financials (As Per Availability)
- 14.1.6.4. Recent Developments
- 14.1.6.5. Key Management Personnel
- 14.1.7. Curb Mobility
  - 14.1.7.1. Company Details
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  - 14.1.7.3. Financials (As Per Availability)
  - 14.1.7.4. Recent Developments
  - 14.1.7.5. Key Management Personnel
- 14.1.8. Gett
  - 14.1.8.1. Company Details
  - 14.1.8.2. Key Product Offered
  - 14.1.8.3. Financials (As Per Availability)
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  - 14.1.9.1. Company Details
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  - 14.1.9.4. Recent Developments
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- 14.1.10. BlaBlaCar
  - 14.1.10.1. Company Details
  - 14.1.10.2. Key Product Offered
  - 14.1.10.3. Financials (As Per Availability)
  - 14.1.10.4. Recent Developments
  - 14.1.10.5. Key Management Personnel

## **15. STRATEGIC RECOMMENDATIONS**

- 15.1. Key Focus Areas
  - 15.1.1. Target Regions
  - 15.1.2. Target Vehicle Type
  - 15.1.3. Target Propulsion Type

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