

Two Wheeler 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 Two Wheeler Shared Mobility Market has valued at USD 70 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 12.7% through 2028. The two-wheeler shared mobility market is a rapidly evolving sector within the broader urban transportation landscape. This market is characterized by the provision of shared electric scooters and bicycles, offering urban residents and commuters convenient, sustainable, and flexible transportation options. Users can locate, unlock, and rent these two-wheelers through mobile applications, making them a popular choice for navigating cities with heavy traffic and limited parking options. One of the defining features of this market is its focus on reducing emissions and mitigating urban congestion. Shared electric scooters and bicycles are eco-friendly alternatives to traditional gasoline-powered vehicles, contributing to cleaner air and reduced carbon footprints. They also offer a solution to the 'last mile' challenge, helping users complete their journeys efficiently from transportation hubs to their final destinations.

Key Market Drivers

Urbanization and Traffic Congestion

The ongoing trend of urbanization has led to increased population densities in cities worldwide. As cities become more congested, traffic congestion and the associated challenges, such as long commute times and air pollution, have intensified. In densely populated urban areas, two-wheelers offer a practical and efficient solution to navigate

through traffic, often outperforming four-wheeled vehicles. Shared mobility services, such as bike-sharing and scooter-sharing platforms, leverage this trend by providing affordable and convenient alternatives for urban commuters. These services help alleviate traffic congestion, reduce the demand for parking spaces, and contribute to a more sustainable urban transportation ecosystem. As urbanization continues to grow, the two-wheeler shared mobility market is poised to expand alongside it.

Environmental Sustainability

Environmental concerns and the push for greener transportation options are significant drivers of the two-wheeler shared mobility market. With increasing awareness of climate change and air pollution, many individuals and governments are seeking eco-friendly transportation alternatives. Two-wheelers, especially electric scooters, and bicycles, offer a sustainable mode of transportation with low emissions and reduced carbon footprint. Shared mobility services that deploy electric two-wheelers further enhance their eco-friendliness. As a result, urban dwellers are increasingly turning to shared electric scooters and bicycles for their daily commutes, reducing their reliance on conventional gasoline-powered vehicles. Moreover, many cities are implementing regulations and incentives to promote sustainable transportation options, such as bike lanes and dedicated parking for shared two-wheelers. These initiatives create a conducive environment for the growth of the two-wheeler shared mobility market.

Technological Advancements

Technological innovations are transforming the two-wheeler shared mobility market in multiple ways. Mobile apps, GPS tracking, and digital payment systems have made it easier than ever for users to locate, unlock, and rent shared scooters and bicycles. These user-friendly platforms provide a seamless experience, encouraging greater adoption. Furthermore, the introduction of electric two-wheelers has revolutionized industry. Electric scooters are becoming increasingly popular in shared mobility fleets due to their quiet operation, reduced maintenance requirements, and the absence of tailpipe emissions. Electric bicycles are also gaining traction, offering users a convenient and eco-friendly mode of transportation. Advancements in battery technology have extended the range and battery life of electric two-wheelers, making them more practical for longer journeys. Additionally, integrated IoT (Internet of Things) sensors and connectivity enable operators to monitor vehicle health, track usage patterns, and perform predictive maintenance, ensuring the reliability of shared fleets.

Economic Factors

Economic considerations significantly influence the adoption of two-wheeler shared mobility services. Shared scooters and bicycles are often more affordable than owning and maintaining a private vehicle, especially in densely populated urban areas where parking and fuel costs are high. Users can access these services on a pay-as-you-go basis, eliminating the need for upfront investments in vehicle ownership. Additionally, the gig economy and flexible work arrangements have contributed to the growth of shared mobility. Many people rely on shared two-wheelers for part-time or gig-based work, such as food delivery or ride-sharing services. The availability of affordable and accessible two-wheelers provides them with a flexible means of income. In regions with limited public transportation options, shared two-wheelers bridge the transportation gap and offer a cost-effective way for individuals to reach their destinations. Economic factors, coupled with convenience, play a pivotal role in driving the adoption of two-wheeler shared mobility.

Changing Lifestyles and Mobility Preferences

Changing lifestyles and mobility preferences are reshaping the way people choose to travel within cities. The younger generation is increasingly valuing experiences and convenience over vehicle ownership. This shift in mindset has fueled the demand for shared mobility services, including two-wheelers. Urban residents are looking for agile and on-demand transportation solutions that align with their fast-paced lifestyles. Shared scooters and bicycles offer a flexible mode of transport that can be easily integrated into daily routines. They are ideal for short trips, such as commuting to work, running errands, or exploring the city, making them well-suited to modern urban lifestyles. Furthermore, the appeal of two-wheeler sharing extends beyond age groups, attracting a diverse range of users who appreciate the freedom, accessibility, and affordability that these services provide. As these changing lifestyles and preferences persist, the two-wheeler shared mobility market is expected to continue its growth trajectory.

Government Support and Regulations

Government support and regulations play a crucial role in shaping the two-wheeler shared mobility market. Many local authorities and city governments have recognized the benefits of shared mobility services in addressing traffic congestion and reducing emissions. In response, they have introduced supportive policies and regulations to promote the growth of these services. Cities are implementing regulations related to parking, safety, and fleet management to ensure the responsible operation of shared

two-wheelers. Additionally, governments are often involved in initiatives to create dedicated bike lanes and infrastructure, making it safer and more convenient for users. Furthermore, subsidies and incentives for electric two-wheelers, along with favorable tax treatment and grants, are encouraging operators to invest in eco-friendly shared mobility solutions. Government support not only drives the adoption of shared two-wheelers but also fosters healthy competition among operators, leading to improved service quality and accessibility.

Key Market Challenges

Regulatory Complexities and Variability

One of the most significant challenges in the two-wheeler shared mobility market is navigating the complex web of regulations and the variability of rules across different regions and countries. Regulations encompass a wide range of factors, including safety standards, vehicle specifications, operational guidelines, parking regulations, and data privacy requirements.

The inconsistency in regulatory frameworks can be particularly challenging for operators looking to scale their services across multiple locations. Each region may have its own set of rules and requirements, making it necessary to adapt the business model and operations accordingly. This variability can lead to increased compliance costs and operational complexities. Moreover, regulations are continually evolving as governments respond to the growth of shared mobility services. Keeping up with changing rules and ensuring compliance can strain resources and add uncertainty to the market. Operators must establish strong partnerships with local authorities and engage in ongoing advocacy efforts to shape regulations that promote the growth of shared two-wheeler services while ensuring safety and responsible operations.

Safety Concerns and Infrastructure Gaps

Safety is a paramount concern in the two-wheeler shared mobility market, and addressing safety challenges is essential for its sustainability. Shared electric scooters and bicycles are used by a diverse range of riders, some of whom may have limited experience or may not be familiar with local traffic rules. Safety issues can arise from rider behavior, such as reckless riding, riding without helmets, or riding on sidewalks, posing risks to pedestrians and other road users. Additionally, inadequate infrastructure, such as poorly maintained roads or the absence of dedicated bike lanes, can contribute to safety concerns.

To mitigate safety challenges, operators must invest in rider education programs and promote responsible riding practices. Encouraging helmet use, enforcing speed limits through geofencing technology, and implementing user penalties for rule violations are some strategies employed by operators. Cities and municipalities also play a crucial role in improving safety by investing in infrastructure upgrades, including the development of dedicated bike lanes and improved signage. Collaborative efforts between operators and local governments are essential to ensure the safe coexistence of shared two-wheelers with other modes of transportation.

Competition and Market Saturation:

The two-wheeler shared mobility market has experienced significant growth, leading to increased competition among operators. As more players enter the market, competition intensifies, and operators must vie for a share of the user base. Market saturation in certain urban areas can be a challenge, as the supply of shared two-wheelers may exceed demand, leading to underutilized fleets and reduced profitability. To address this challenge, operators must carefully plan fleet sizes and distribution based on demand patterns. The competitive landscape is also evolving as new entrants explore innovative models and technologies. In some cases, established ridesharing and e-commerce companies have entered the two-wheeler sharing market, bringing their extensive resources and user bases. This trend adds further complexity to the competitive dynamics within the industry. To remain competitive, operators must differentiate their services through factors such as technology integration, user experience, and service quality. The ability to provide unique features and value-added services can help operators attract and retain users in a crowded market.

Technological Limitations and Maintenance

The reliance on technology is a cornerstone of two-wheeler shared mobility services, but it also poses challenges related to maintenance and technical issues. Shared electric scooters and bicycles are equipped with various components, including batteries, GPS systems, locks, and connectivity hardware, all of which must function reliably for the service to operate smoothly.

Technological limitations can lead to operational disruptions, such as scooters or bicycles becoming inoperable due to battery issues, connectivity problems, or software glitches. These disruptions not only inconvenience users but also increase operational costs associated with maintenance, repair, and fleet management. Furthermore,

extreme weather conditions, such as heavy rain or extreme cold, can accelerate wear and tear on shared two-wheelers, leading to increased maintenance needs. Operators must establish efficient maintenance protocols and perform regular inspections to address these challenges promptly. Additionally, the introduction of electric scooters with swappable batteries has raised concerns about battery theft and vandalism, which require additional security measures and monitoring.

User Behavior and Responsibility

User behavior and responsibility present significant challenges in the two-wheeler shared mobility market. Irresponsible or careless behavior by riders can lead to safety risks and damage to vehicles, negatively impacting the user experience and the reputation of the service. Issues related to user behavior include riding on sidewalks, disregarding traffic rules, failing to wear helmets, and parking shared two-wheelers inappropriately or obstructing pedestrian pathways. Such behavior can lead to conflicts with pedestrians, motorists, and residents. Operators are tasked with educating users about responsible riding practices and enforcing rules through penalties and suspensions. Effective communication, in-app reminders, and user engagement campaigns are employed to promote responsible behavior. Additionally, issues related to theft, vandalism, and vehicle disposal require operators to implement security measures and monitoring systems to safeguard their fleets. Operators must strike a balance between providing convenient access to shared two-wheelers and ensuring that users act responsibly and respect local regulations.

Key Market Trends

Electric Two-Wheelers Dominate the Market:

One of the most significant trends in the two-wheeler shared mobility market is the increasing dominance of electric two-wheelers, including electric scooters and bicycles. As cities worldwide seek to reduce emissions and combat air pollution, electric mobility solutions have gained prominence. Shared mobility operators are rapidly transitioning their fleets from traditional gasoline-powered vehicles to electric alternatives. Electric scooters, in particular, have gained popularity due to their zero-emission operation, quiet ride, and ease of use. Electric bicycles are also becoming a common sight in shared mobility fleets, providing users with eco-friendly transportation options. The adoption of electric two-wheelers is driven by several factors, including government incentives, environmental awareness, and advancements in battery technology. Users appreciate the convenience of electric shared mobility options, and governments often

offer subsidies and incentives to promote their use. As battery technology continues to improve, electric two-wheelers are becoming more affordable, efficient, and reliable, making them a practical choice for both operators and riders.

Integration with Multimodal Transportation

Another prominent trend in the two-wheeler shared mobility market is the integration of shared two-wheelers into multimodal transportation systems. Many urban dwellers are embracing a multimodal approach to commuting, combining various modes of transportation to reach their destinations efficiently. Shared two-wheelers, such as electric scooters and bicycles, complement other modes of transportation, such as public transit and ride-sharing services. Users can easily switch between different transportation options within a single journey, reducing travel times and increasing convenience. To facilitate this integration, mobility providers are partnering with transit agencies and developing integrated apps that allow users to plan and pay for their entire journey seamlessly. This trend aligns with the growing demand for flexible and interconnected transportation solutions in urban areas, where users are seeking efficient ways to navigate the city.

Focus on Safety and Infrastructure

Safety has become a paramount concern in the two-wheeler shared mobility market, leading to a trend of increased emphasis on safety measures and infrastructure improvements. As the popularity of shared two-wheelers grows, ensuring the safety of riders and other road users has become a top priority for operators and regulatory authorities. Many shared mobility operators are investing in safety features and rider education programs to promote responsible riding practices. Helmets, reflective gear, and safety instructions are often provided with shared electric scooters and bicycles. Additionally, some operators have introduced geofencing technology to enforce speed limits and restrict the use of two-wheelers in specific areas, such as sidewalks. Furthermore, cities are investing in infrastructure improvements to accommodate shared two-wheelers. Dedicated bike lanes, bike-sharing stations, and improved road signage contribute to safer and more convenient riding experiences. Governments and municipalities are actively working to create a safe and supportive environment for shared two-wheelers as they become an integral part of urban transportation.

Expansion Beyond Urban Centers

While shared two-wheelers initially gained popularity in densely populated urban areas,

a growing trend is the expansion of these services beyond city centers. Operators are recognizing the potential for shared mobility in suburban and even rural areas, providing residents with convenient transportation options that were previously limited to urban environments. Suburban expansion offers several advantages, including reduced competition for riders, lower operating costs, and increased utilization of shared two-wheelers. Operators are adapting their business models to cater to suburban and rural communities, making shared two-wheelers accessible to a broader range of users. This trend aligns with the changing preferences of individuals who seek alternatives to traditional vehicle ownership in non-urban settings. As shared two-wheelers become available in more locations, they offer a sustainable and cost-effective transportation solution for a wider demographic.

Micro-Mobility as a Solution for Last-Mile Connectivity:

Last-mile connectivity remains a significant challenge in urban transportation, and micro-mobility solutions, such as shared electric scooters and bicycles, are emerging as a practical solution. This trend focuses on addressing the 'last mile' problem, which refers to the challenge of getting from a transportation hub, such as a train station or bus stop, to the destination. Shared two-wheelers provide an efficient and eco-friendly means of covering short distances within urban areas. Users can easily access shared scooters or bicycles near transportation hubs and use them to complete their journeys quickly and conveniently. This trend reduces reliance on private cars and helps alleviate traffic congestion in city centers. Operators are strategically deploying their fleets near transit stops and key points of interest to cater to commuters and residents looking for reliable last-mile connectivity. The availability of shared two-wheelers for last-mile travel has the potential to reduce the overall number of vehicles on the road and improve urban mobility.

Regulatory Frameworks and Standardization:

The two-wheeler shared mobility market is experiencing increased attention from regulatory authorities seeking to establish comprehensive frameworks for these services. As the industry matures, governments are introducing regulations to ensure safety, operational standards, and responsible behavior among operators and riders. Regulations cover various aspects, including speed limits, parking rules, data privacy, insurance requirements, and fleet management practices. These standards aim to create a level playing field for operators, enhance rider safety, and address potential issues related to sidewalk clutter and pedestrian safety. Standardization efforts are also emerging to promote interoperability among different shared mobility services and

streamline the user experience. The development of common data-sharing protocols and payment systems is an example of how standardization can benefit both users and operators.

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

Rapido

Report Scope:

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

Two Wheeler Shared Mobility Market, By Propulsion Type:

ICE

Electric

Two Wheeler Shared Mobility Market, By Mobility Type:

Ride Sharing

Vehicle Leasing

Private

Two Wheeler 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 Two Wheeler Shared Mobility Market.

Available Customizations:

Global Two Wheeler 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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