

Digital Disruptors: The Global Competitive Landscape of Shared Mobility Services

May 2021

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INTRODUCTION

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Key findings

STATE OF PLAY

COVID-19 lockdowns prompt a 30% decline in shared mobility bookings

Micro-mobility sees a rebirth as people seek solo travel

Riders are placing emphasis on hygiene when using shared mobility

Mobility slump sees firms shift to foodservice and other business arms

"Netflix-ification" of shared mobility is changing subscription models

PROFILES OF GLOBAL DISRUPTORS

Uber

Didi Chuxing

PROFILES OF DISRUPTORS IN THE AMERICAS

Lime

99

Lyft

PROFILES OF DISRUPTORS IN ASIA

SoCar

HKTaxi

Beam

GoCatch

Ola

GoRide

Grab

Park 24

LINE Taxi

PROFILES OF DISRUPTORS IN EMEA

Yandex.Taxi

Cabify

Bolt Technology OÜ

Rentiva

Careem

Voi

Liftago

Enjoy

Share Now

BlaBlaCar

PROSPECTS

Electric mobility to steam ahead as big players make sustainability push

15-minute city move will spur shared micro-mobility business models

MaaS to make a comeback amid growing demand for integration

Shared e-bikes to become a growing micro-mobility trend

New shared mobility business models to emerge in the future

APPENDIX

Digital Consumer analysis regularly leverages multiple methodologies

An overview of methodologies often used in Digital Consumer analysis (1)

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