

World Market for Shared Mobility

August 2022

Table of Contents

INTRODUCTION

Scope
Key findings
Examining five trends shaping shared mobility

STATE OF THE INDUSTRY

Maturing shared mobility market is set single-digit growth in 2024
China and the US are the major global powerhouses of the shared mobility industry
Ride hailing is the dominant segment of shared mobility...
...but micro-mobility is catching up
Western Europe to see an upsurge in scooter sharing but regulations could hamper rise
North America and Asia Pacific seeing drops in market share as Middle East and Africa rises
Scooter sharing shows large potential across most regions as people opt for micro-mobility
Southeast Asian economies to record fastest growth

LEADING COMPANIES AND BRANDS

Didi Chuxing and Uber maintain lead despite regulatory challenges and competition
Leading players are facing growing competition in some key markets
Changing dynamics in market consolidation across shared mobility segments
Four of the top 10 shared mobility brands are Chinese in 2021

TOP TRENDS SHAPING THE INDUSTRY

Examining five trends shaping shared mobility
Electrification: shared mobility is on a mission to decarbonise the transport industry
Uber seeks to be 100% zero emissions by 2040 globally
Regulations: government regulations are creating more challenging business environments
Rome imposing stricter regulations on scooters
Diversification: new revenue streams to deliver more robust business models
Bolt: diversifying its business model
MaaS integration: moving towards a future without private passenger car travel
Moovit integrates Link and Bird e-scooters into MaaS system
AI and tech integration
Lime introduces pavement detection technology

MARKET SNAPSHOTS

Asia Pacific
North America
Western Europe
Latin America
Eastern Europe
Australasia
Middle East and Africa
Car sharing
Bike sharing
Ride hailing
Ride sharing
Scooter sharing

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