

Competitor Strategies in Shared Mobility

March 2024

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Executive summary

COMPETITIVE LANDSCAPE

Top companies in shared mobility

Shared mobility remains a two-horse led by Uber Tech Inc and Beijing Xiaoju Tech Co Ltd

Industry players remain ride-hailing orientated, despite efforts to diversify

The largest shared mobility markets are largely monopolised by a single brand

Bolt and Grab: The few companies with exposure in both emerging and developed markets

Uber remains a truly global brand with strong market positions across most geographies

COMPETITIVE LANDSCAPE BY CATEGORY

Ride hailing: Uber and Didi lead, as others continue to play catch-up

Car sharing: Turo leads with a 25% market share, as others see weaker performances

Bike sharing: Chinese brands dominate; strong shift to e-bike sharing

Scooter sharing: Lime holds advantage; Bird files for bankruptcy amid industry challenges

Ride sharing: Uber, Didi and BlaBlaCar vie for top spot in ride sharing

STRATEGIES

Key strategies in the shared mobility market

STRATEGIES: PROFITABILITY

Companies prioritising profitability amid tighter financing conditions and IPO desires

Case study: Helbiz pulls back from unprofitable markets

Case study: Lime prioritising profitability as it seeks IPO

STRATEGIES: LOYALTY

Loyalty: Shared mobility companies are focused on driving customer loyalty strategies

Case study: Forest Launches a monthly e-bike subscription service

Case study: Lyft launches “Green” mode to allow users to hail EVs or hybrids

Case study: Forest uses gamification tactics to build engagement and loyalty

Case study: Careem – the “everything app” catering to a diverse range of consumers

STRATEGIES: PARTNERSHIPS

Strategic partnerships are becoming common as brands look to stay ahead of the competition

Case study: Uber partners with Waymo to provide autonomous rides

Case study: Karhoo and FreeNow partner to expand services across Europe

STRATEGIES: PREMIUMISATION

Shift to premium and luxury services provides ride-hailing brands with larger margins

Case study: Luxury and premium ride-hailing service provider Wheely enters Dubai market

Case study: Ola introduces Ola Prime Plus for premium ride-hailing customers

SUMMARY

Summary points

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