

## Report Information

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# Mobility as a Service Market Research Report - Forecast till 2030

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## Description:

## Mobility as a Service Market Overview:

The Mobility as a Service Market is expected to reach over USD 510.22 Billion by the year 2030 registering a CAGR of 27.74%. Mobility as a Service operation is carried out by integrating various modes of transportation to a single platform with the help of mobile application. The technology helps the customer in planning the travel including the various transportation methods and payment details. The Mobility as a Service is customer centric and leads the customer to obtain energy efficient and cost efficient way of commute. Various modes of transportation can be accessed on demand. Mobility as a Service operation is carried out with the help of data service providers that acquires real-time information regarding weather and traffic. The transportation manufacturers and governmental bodies take higher responsibility for efficient functioning of MaaS.

Mobility as a Service works in collaboration with the various gateway options to help the customers pay digitally. The recent reports published by the World Health Organization shows that over 50% of world population are already living in urban areas where the roadway transportation is already congested. The percentage is likely to increase over 60% by 2025. The increasing population in the urban areas has increased the congestion in the roadways and created issues with the parking personal vehicles. The reduction of personal vehicle can slowly address the issue. Hence the Mobility as a Service market is likely to witness tremendous growth in the traffic congested areas.

- On Oct. 20, 2022, The Rhein-Main-Verkehrsverbund (RMV) launched a new Mobility-as-a-Service (MaaS) app -RMVgo, to provide its users with access to multimodal & intermodal transport options, ticket purchasing, journey planning, and connection & other traffic information. Integrated with public transport, taxis, car-sharing, scooters, and bike-sharing, the new RMVgo MaaS app includes features such as the first advance sale of season tickets and an alarm function for delays.

## COVID 19 Analysis of MaaS Market

The pandemic has prevented crowds and restricted the movement across the globe. The automotive industry like any other crucial industry has witnessed a sharp decline due to the health crisis. The rising health concerns due to the pandemic have increased the fear of spread of the disease in several countries. Hence a large number of people have reduced utilizing the services.

The public transport has stopped working in majority of countries. The work-from-home condition has reduced the overall transportation services. These factors have adversely affected the Mobility as a Service market value in the recent years. Unavailability of drivers for the infected people, fear among the public, cost of sanitation are some of the factors that impact the Mobility as a Service market.

- On Oct. 17, 2022, CitySwift (Ireland), a MaaS solution provider, announced securing €5 MN to build a mobility intelligence platform fueling greener public transport. CitySwift's industry-leading mobility intelligence platform delivers real-time data analysis & actionable insights to improve the public transport network. The Irish startup is on a mission to give public transport operators more resilience while helping the sector become greener.

The significant shift to technology upgrades due to compounding crises such as the Covid19 pandemic and climate change, along with increased traffic congestion and changed travel patterns, have presented CitySwift with an exciting opportunity. These funds will be used to fast-track expansion plans and fuel the company's goal to help the public transport industry to respond to issues like fuel hikes, funding uncertainty, and Covid-19 recovery.

## Market dynamics

### Market drivers

Instead of owning the vehicle and bearing a huge cost of ownership and maintenance costs for the vehicle, Mobility as a Service offers better comfort and easy commute ways in the transportation services. The insurance premium, fuel costs, parking expenses can be eliminated when the consumer prefers to use the MaaS technology. Additionally, the users are allowed to enjoy the perks of driving the personal vehicles without owning them. The payment is considerate and depends on the number of miles covered. Expenses like fuel, insurance, parking are covered by the

service provider.

The countries who are largely focusing in reducing the carbon dioxide emission have encouraged their citizens to utilize the Mobility as a Service technology, the on growing usage of smartphones and enhanced 5G technology infrastructure have increased the Mobility as a Service market demand in the recent years.

- On Oct. 07, 2022, Hero MotoCorp (India), a leading two-wheeler producer, launched an electric scooter – Vida, under a new brand in the premium category, entering the electric scooter space. In October, the company also launched electric motorcycles, B2B vehicles, and even autonomous vehicles, eyeing mid- to long-term high-performance e-bikes.

Further, Hero MotoCorp will have multiple variants and modularity options, such as B2B vehicles, multiple form factors across electric mobility, advanced driver assistance, and autonomous vehicles, with the Vida V1. The company also plans to offer differentiated services like mobility as a service (MaaS) & battery as a service (BaaS), and insurance & warranty.

### **Market opportunities**

Several developed countries are highly focusing in developing smart cities and are increasingly investing in those projects. They have incorporated solutions that are eco-friendly in those smart cities. Hence there are stringent limitations involved in the usage of carbon emitting vehicles. These factors have increased the opportunity for the growth of Mobility as a Service market.

Several countries like Europe are increasingly adopting Electric vehicles and installing power stations to fuel these vehicles. Such factors are increasingly impacting the Mobility as a Service industry. Additionally the advent of autonomous taxis and vehicles has reduced transportation costs. Such factors have increased the demand of Mobility as a Service market.

### **Market restraints**

Since the Mobility as a Service is operated with the help of internet, the data transmission is at risk of getting hacked by potential hackers. The payment details, personal details shared during the process involves risks. This factor is expected to impede the Mobility as a Service market growth.

The authority and leadership issues are the major challenge in the Mobility as a Service market. The private and public sector leaderships are essential to carry out the operations.

### **Market challenges**

The effective functioning of Mobility as a Service market includes several sectors like telecom operators, service operators, manufacturers, automotive industry, public sector, user groups and so on. Hence the challenge might arise in any of these sectors.

Several governmental organizations will approve the project only if it imbibes with the Public-Private Partnership model. The model recommends the service provider to participate in any government initiatives. This factor is considered as the crucial restraining factor for the Mobility as a Service market.

The private transportation can function on demand, but the public transportation can't. The supply and demand ratio plays vital role in this sector. This is also a major challenge in carrying out the project.

### **Cumulative growth analysis**

The Mobility as a Service operators are capable of obtaining the real-time data about the weather, traffic, easy routes, costs incurred, various options and potentially all the information related to the travel with minimal hassle. The increasing utilization of smart phones and easy way of accessing using the mobile platforms has increased the overall demand for the Mobility as a Service industry. Currently, the global Mobility as a Service industry value is expected to reach over 485 billion by the year 2024 registering a CAGR of 39.40%. The integration of several platforms and sharing, leasing options have increased the popularity among the end-users.

As the countries who are highly investing in the eco-friendly products and services encourage the Mobility as a Service sector with their citizens which help in reducing the number of vehicles on the roads. The countries like Asia-Pacific are increasingly suffering from road congestions which propelled the Mobility as a Service market growth in the recent years and expected to reach the mentioned value in the forecast period.

### **Value chain analysis**

The countries that are increasingly suffering from road congestions are implementing projects like intra-city buses, metro projects, light rail, high-speed rail systems, and so on. Apart from all of those projects, the Mobility as a Service market is expected to witness tremendous growth owing to the services like traffic management, payment, self-driving unit, and autonomous vehicle driving, etc.

Consumers who are looking for a hassle-free commute prefer to choose Mobility as a Service for their regular commute to work or essential places. The proliferation of wifi, 5G, Bluetooth, IoT devices have increased the Mobility as a Service market value in recent years. The highly technological transportation, subscriptions schemes, and affordable transportation have encouraged customers to adopt the technology.

### **MaaS Market Segment overview**

#### **MaaS Market By Service Type**

- Ride-Hailing
- Car Sharing
- Micro mobility
- Bus Sharing
- Train Services

#### By Solution Type

- Technology Platforms
- Payment Engines
- Navigation Solutions
- Telecom Connectivity Providers
- Ticketing Solutions
- Insurance Services

#### By Transportation Type

- Public
- Private

#### MaaS Market By Vehicle Type

- Micro mobility
- Four-wheelers
- Buses
- Trains

#### By Application Type

- Personalized Application Services
- Journey Management
- Journey Planning
- Flexible Payments & Transactions

#### Mobility as a Service Market By Operating System

- Android
- iOS
- Others (Linux, Symbian OS, Blackberry OS, Windows, and KaiOS)

#### By Business Model

- Business-to-Business
- Business-to-Consumer
- Peer-to-Peer

#### By Region

- Asia Oceania
- Europe
- North America
- Rest of the

On Oct. 26, 2022, Volkswagen (Germany), a leading global motor vehicle manufacturer, announced that it is focusing on developing autonomous driving with autonomous mobility as a service (MaaS/TaaS). The company aims to offer its customers the most powerful functions, with its development cost-effectively. Volkswagen Commercial Vehicles is responsible for implementing the MaaS / TaaS areas.

The development of autonomous driving is a key focus area for the Volkswagen NEW AUTO strategy. In highly automated driving as a service (MaaS/TaaS), the manufacturer consolidates its development partnerships with Cariad, Bosch, and Horizon Robotics in China.

#### Mobility as a Service Market Regional analysis

The Mobility as a Service market is expected to witness booming growth in the countries like North America, Europe, Asia-Pacific. Among these countries, Europe is significantly focusing on developing solutions and services that are eco-friendly. They are thriving to reduce carbon emissions and introducing electric vehicles across the country. The

economic conditions of these countries and the changing preference of consumers and riders have positively impacted the Mobility as a Service market in recent years.

Currently, North America is holding the second-largest revenue holder of the global Mobility as a Service market which was valued at USD 9.63 billion in the year 2018, despite the lockdown and the restrictions, the market is appearing to be booming in the forecast period.

- On Oct. 27, 2022, The European Union (EU) announced its financial and technical help in modernizing public transport in Kochi, India. Kochi government inaugurated a workshop on smart cities & sustainable urban development under India-EU Urban Partnership A software architect from MaaS Global (Finland) elaborated on the components of a MaaS system, arraying different mobility providers under an app and a unified payment mode.
- On Oct. 14, 2022, Shanghai, China, launched a mobility-as-a-service app, Suishenxing, to reward users for choosing greener travel options. The new MaaS app enables users to book taxi rides, find & pay for parking spaces, and pay for their journeys by ferry, bus, and metro services, across the city from their smartphone.

The Suishenxing app also rewards registered users with credits for every metro or bus service used to promote environmentally friendly modes of transport. Through the public transportation service, users can avail of a swipe-for-all pass, including all codes needed to take public transport

- Daimler AG (Germany)
- Bayerische Motoren Werke AG (BMW) (Germany)
- Deutsche Bahn (Germany)
- Xerox Corporation (US)
- Lyft Inc (US)
- MaaS Global Oy (Switzerland)
- GrabTaxi Holdings Pte Ltd (Singapore)
- Beijing Xiaoju Technology Co. Ltd (China)
- Uber technologies inc. (US)
- Communauto (Canada)
- Moovit Inc. (Israel)
- ANI Technologies Private Limited (India)
- Bridj Pty Ltd (Australia)
- JapanTaxi Co. Ltd (Japan)
- and Wiwigo (India)

#### Recent developments

To control the crowd and prevent the COVID spread, the Mobility as a Service market has incorporated technology that allows the passengers to choose quieter roads and forms of transports. The inclusion of cycles, e-scooters that encourage social distancing has helped in a great way during the lockdown. The technology was launched soon after the breakout of COVID, precisely in May 2020.

The on-demand solution helps the crucial workers and employees to commute to their workplace during the time of the pandemic. The transportation both public and private sectors have been closed during the lockdown which affected the crucial workers, health administrators to reach their workplace. The new solution deployed in such cities has helped the employees to commute without any fear of infection.

#### Mobility as a Service Market Report overview

This report has covered

- Market overview
- COVID 19 Analysis
- Market dynamics
- Cumulative growth analysis
- Value chain analysis
- Segment overview
- Regional analysis
- Competitive landscape
- Recent developments

## Segmentation Table

### MaaS Market By Service Type

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- Micro mobility
- Bus Sharing
- Train Services

### Mobility as a Service Market By Solution Type

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- Private

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- Peer-to-Peer

### By Region

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- Europe
- North America
- Rest of the World

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