

## **Mobility As A Service - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

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### **Report description:**

Mobility As A Service Market Analysis

The mobility as a service market is expected to grow from USD 328.98 billion in 2025 to USD 374.55 billion in 2026 and is forecast to reach USD 716.3 billion by 2031 at 13.85% CAGR over 2026-2031. Strong urban population growth, continuous smartphone adoption, and heightened environmental awareness are shifting consumers from private vehicle ownership toward integrated, shared, and multimodal transport offerings. API standardization, electric and hydrogen propulsion adoption, and seamless payment innovation are accelerating platform interoperability, improving customer experience, and driving provider revenue diversification. Policymakers are pushing zero-emission goals that prioritize public-private partnerships and stimulate large-scale deployments of electric fleets, while 5G and IoT upgrades enable real-time fleet orchestration and predictive journey management. Intensifying competition between incumbent ride-hailing leaders and emerging specialized MaaS orchestrators is prompting aggressive investment in artificial intelligence, data monetization, and subscription models as companies seek defensible differentiation.

Global Mobility As A Service Market Trends and Insights

Integration of Micro-Mobility and Public Transit Across European Cities

The seamless integration of micro-mobility options with traditional public transit systems creates multimodal transportation networks that significantly enhance first-mile/last-mile connectivity. European cities like Helsinki and Vienna are pioneering this

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integration, with public transport authorities actively incorporating bike-sharing and e-scooter services into unified mobility platforms. This integration is yielding remarkable results, with the International Transport Forum reporting that properly integrated micro-mobility can increase public transit ridership by up to 35% in urban corridors. The most successful implementations feature standardized docking stations strategically positioned near transit hubs, unified payment systems, and real-time availability data. Beyond improving transit accessibility, this integration is reshaping urban planning priorities, with cities like Barcelona redesigning street infrastructure to accommodate micro-mobility lanes that connect directly to transit stations.

#### Government Zero-Emission Targets Fueling EV-Centric MaaS Bundles

Stringent emission reduction targets across regions such as Asia-Pacific are catalyzing the development of electric vehicle-focused MaaS offerings that combine EV ride-hailing, electric car-sharing, and e-bike rentals into comprehensive mobility packages. China's mandate for 40% of vehicles to be electric by 2030 has prompted companies like Didi to launch "Green Alliance" MaaS bundles that exclusively feature zero-emission transportation options. These EV-centric services are gaining significant traction, with TUV SUD reporting that electric mobility services can reduce urban transport emissions by up to 70% compared to conventional vehicle usage.

#### Fragmented Regulatory Frameworks Across U.S. States

The inconsistent patchwork of transportation regulations across U.S. states is creating significant operational challenges for MaaS providers attempting to scale nationally. Each state imposes different licensing requirements, insurance mandates, and operational restrictions. This regulatory fragmentation forces companies to develop state-specific operational models, substantially increasing compliance costs and slowing market penetration. The Federal Highway Administration highlights that this lack of regulatory harmonization has resulted in up to 35% higher operational costs for multi-state MaaS providers than those operating in more unified regulatory environments.

Other drivers and restraints analyzed in the detailed report include:

API Standardization (NeTEx, GTFS-RT) Enabling Account-Based Ticketing  
Surge in VC Funding for South America MaaS  
Super-Apps  
GDPR/CCPA-Driven Data-Privacy Compliance Costs

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Ride-hailing dominates the MaaS market with a 45.85% share in 2025, leveraging its established user base and extensive driver networks to maintain market leadership. However, micro-mobility services (scooter/bike sharing) are emerging as the fastest-growing segment with a projected CAGR of 19.12% from 2026 to 2031, driven by their effectiveness in addressing first-mile/last-mile connectivity challenges. The IAA Mobility report indicates that micro-mobility solutions equipped with IoT connectivity and high-performance batteries significantly enhance user experience through improved stability and real-time availability tracking. This growth is further supported by city governments increasingly allocating dedicated infrastructure for micro-mobility lanes and parking zones.

The car sharing segment is witnessing substantial innovation through the introduction of flexible, free-floating models that eliminate fixed pickup and drop-off locations, while bus sharing services are gaining traction in corporate environments and campus settings. The scooter sharing segment, despite regulatory challenges in some markets, is expanding rapidly due to its low implementation costs and high user adoption rates.

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Technology platforms lead this segment with 37.72% market share in 2025, serving as the foundational infrastructure that enables service integration and user interface. Meanwhile, payment and wallet solutions are experiencing the fastest growth at a 20.95% CAGR (2026-2031), as they address a critical friction point in the multimodal journey experience. The emergence of open-loop payment systems is particularly transformative, with PaymentGenes reporting that MaaS platforms implementing these systems see up to 40% higher user retention compared to those using closed-loop systems. These systems eliminate the need for users to preload funds or maintain multiple payment methods across different services.

Trip planning and navigation solutions continue to evolve with the integration of artificial intelligence that can predict disruptions and suggest alternatives in real-time. Connectivity and telematics solutions are enabling enhanced vehicle tracking and fleet management capabilities, while insurance and support services are expanding to address the unique needs of shared mobility users.

Passenger cars maintain their dominance with 56.63% market share in 2025, reflecting the continued importance of ride-hailing and car-sharing services in the MaaS ecosystem. However, autonomous pods are projected to achieve the highest growth rate at 22.74% CAGR from 2026-2031, as they offer a compelling solution for controlled environments and first/last-mile connectivity. Research published in the IEEE Intelligent Transportation Systems Magazine demonstrates that autonomous modular vehicle technology can reduce operational costs by up to 40% compared to traditional fixed-route transit while improving service flexibility. These self-driving pods are particularly effective in campus environments, business parks, and planned communities where infrastructure can be optimized for autonomous operation.

Micro-mobility vehicles (e-bikes, e-scooters) continue to gain market share, particularly in dense urban areas where they offer superior maneuverability and parking convenience. Shuttles and buses are evolving with the introduction of on-demand routing algorithms that optimize occupancy rates and reduce wait times.

The Mobility As A Service Market Report is Segmented by Service Type (Ride-Hailing, Car Sharing, and More), Solution (Technology Platform, Payment and Wallet, and More), Vehicle Type (Passenger Cars, Shuttles and Buses, and More), Transportation Type (Public and Private), Business Model, Application, End-User, Operating System, Propulsion, and Geography. The Market Forecasts are Provided in Terms of Value (USD).

## Geography Analysis

Asia-Pacific contributed 34.12% of the mobility as a service market share in 2025, capitalizing on dense cities, advanced digital payments, and coordinated infrastructure investments. China's restriction on vehicle registrations in major metros nudges commuters toward shared platforms, while India's expanding middle class embraces affordable ride-hailing. Singapore's Smart Nation blueprint integrates public transit, micro-mobility, and unified payments into a single citizen app that exemplifies best-practice integration.

North America ranks second in market size. High ownership costs, renewed urban densification, and corporate travel sustainability mandates propel shared mobility growth, though state-by-state regulatory divergence slows national platform scale. Technology leadership in San Francisco, Austin, and Toronto supports early adoption of predictive analytics and autonomous pilots. Government incentives for electric vehicle fleets further strengthen the region's mobility shift.

The Middle East and Africa presents the fastest regional expansion at 14.05% CAGR through 2031. Gulf Cooperation Council governments prioritize MaaS within smart-city megaprojects like NEOM and Expo City, allocating capital for autonomous shuttles and integrated fare systems. The Memorandum of Understanding between Abdul Latif Jameel and Joby Aviation to deploy up to 200 electric vertical take-off aircraft signals nascent aerial mobility ambition, augmenting ground-based services and reinforcing multimodal networks.

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## List of Companies Covered in this Report:

Uber Technologies Inc.

## Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format  
3 months of analyst support </ul>

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