

ANMD-MRS34-335 · Sustainable Tourism Technologies

Low-Carbon Travel Apps

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Low-carbon travel apps combine multimodal trip planners, carbon-comparison apps and rail and coach booking tools to help travellers choose and book lower-emission journeys. By surfacing carbon alongside time and price across modes, they shift travel choice toward rail, coach and shared mobility. This decision-grade study sizes the global market two ways — value and units (downloads / active users) — across system type, comparison-app type and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond convenience, low-carbon travel apps deliver measurable modal-shift emissions reduction and informed traveller choice, while carbon-at-decision strengthens the sustainable-mobility story.

Mapped Sustainable Development Goals:

SDG 13 Climate Action	SDG 11 Sustainable Cities	SDG 12 Responsible Consumption	SDG 7 Affordable Clean Energy	SDG 15 Life on Land
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Measurable sustainability outcomes assessed:

- Modal-shift emissions reduction from lower-carbon journey choices
- Informed traveller choice with carbon surfaced at the point of decision
- Reduced short-haul flying and private-car kilometres
- Carbon-data integrity and equity of access as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, CSRD, the EU Taxonomy and GSTC, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	5 SDGs Mapped

MARKET OVERVIEW

From niche planners to mainstream multimodal-with-carbon platforms — where carbon sits beside time and price at the moment of choice.

The low-carbon travel apps market is moving from niche planners to mainstream multimodal-with-carbon platforms. Demand is driven by rail-renaissance policy, corporate travel-emission targets and traveller climate awareness, supported by open mobility data and MaaS integration. The market is read two ways — value and units — and forecast under four scenarios, each region reported separately.

- Europe is the multimodal-rail leader — Germany, the UK and France, on dense rail networks and short-haul-flight scrutiny
- North America scales on corporate travel, where business-travel carbon targets and transit apps drive low-carbon planning
- System type and application segment the value — across planners, comparison apps and rail / coach booking
- Carbon-at-decision is the differentiator — showing emissions at the point of choice shifts behaviour after-the-fact reporting cannot

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Europe	Multimodal-rail leader	Germany, UK, France — dense rail, flight scrutiny, open data
North America	Corporate-travel	United States, Canada — business-travel targets, transit apps
Asia Pacific	Emerging	Japan, China — high-speed rail, urban-mobility integration
Latin America	Emerging	Brazil, Mexico — intercity coach and urban mobility
Africa	Frontier	South Africa, Kenya — transit and intercity planning
Middle East	Frontier	UAE, Saudi Arabia — new rail and smart-mobility apps

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • Rail-renaissance & short-haul-flight policy • Corporate travel-emission targets • Traveller climate awareness • Open mobility data & MaaS integration • App & booking-API maturity 	<ul style="list-style-type: none"> • Fragmented booking & inventory access • Carbon-data accuracy & comparability • Monetisation & commission models • Behaviour-change beyond awareness • Coverage gaps outside dense networks

SEGMENTATION SNAPSHOT

By System Type	Multimodal trip planners · carbon-comparison apps · rail / coach booking
By Comparison App	Mode-comparison · route-carbon · offset-linked · MaaS-integrated
By Application	Leisure travel · business travel · daily mobility
By End User	Travellers · corporates · travel agents · destinations
By Business Model	Free / ad · commission · SaaS / corporate · licensing
By Deployment Scale	Consumer app · corporate · destination-integrated

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Low-Carbon Travel Apps
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
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- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

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- › Chapter 28. Sustainability Intelligence Suite
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- › Chapter 34. Circular Economy and Resource-Security Intelligence
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Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

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- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans travel-app and mobility-platform vendors, platform specialists and integrated system providers. Deal activity — multimodal-platform partnerships, rail-booking integration and carbon-data alliances — signals a market organising around carbon-aware, bookable journeys.

Representative players profiled in the full report:

Trainline plc · GoEuro Travel GmbH (Omio) · Rome2Rio Pty Ltd · SNCF Connect & Tech SAS · Skyscanner Ltd · and 20+ further profiled players across the value chain.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a decision-ready investment verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global low-carbon travel apps market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do the economics of low-carbon travel apps change returns versus incumbent approaches?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › **Triangulated sizing** — every market read across two ways — value and units (downloads / active users) so the views reconcile rather than conflict.
- › **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, decision-ready investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, travel-app and mobility-platform vendors, travel-management companies, corporates and travel agents, destinations and DMOs, research institutions, policymakers, and corporate strategy and ESG teams. This report supports investors, operators, developers, manufacturers, lenders and policymakers — alongside strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.