INNOVATIVE MOBILITY CARSHARING OUTLOOK

CARSHARING MARKET OVERVIEW, ANALYSIS, AND TRENDS ▪ Summer 2015

TRANSPORTATION SUSTAINABILITY RESEARCH CENTER - UNIVERSITY OF CALIFORNIA, BERKELEY

By Susan Shaheen, Ph.D. and Adam Cohen

this issue

Mobility and the Sharing Economy:

Susan Shaheen talks about the future of carsharing at the International Workshop on the Sharing Economy in June 2015.

Save the Dates!

We invite you to save the dates and look for detailed announcements on speakers, registration, lodging, and other special events for the following conferences:

Carsharing Association Conference

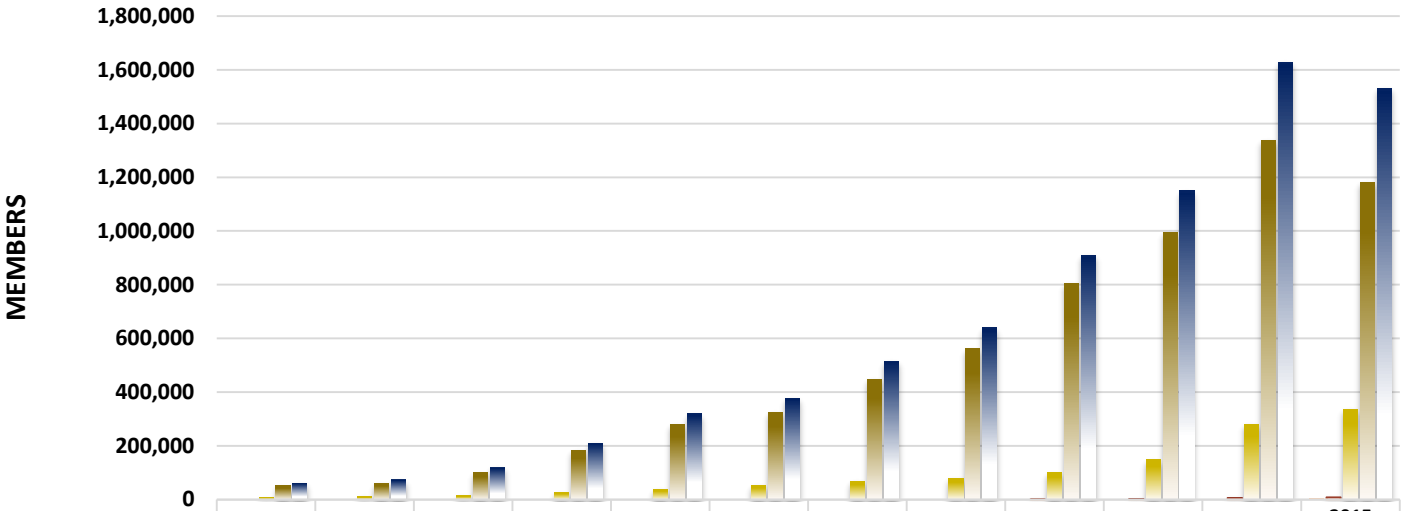
Mark your calendars for **September 22-23, 2015** for the Carsharing Conference to be held in Vancouver, Canada. For more information, please see page 4 or visit: **http://conference.carsharing.org/**

Disrupting Mobility Summit: Shared Technology and the Future of Mobility

Mark your calendars for **November 12-13, 2015** for the Disrupting Mobility Summit to be held in Cambridge, Massachusetts. For more about the summit, please see page 4 or visit: **http://www.disrupting-mobility.org/**

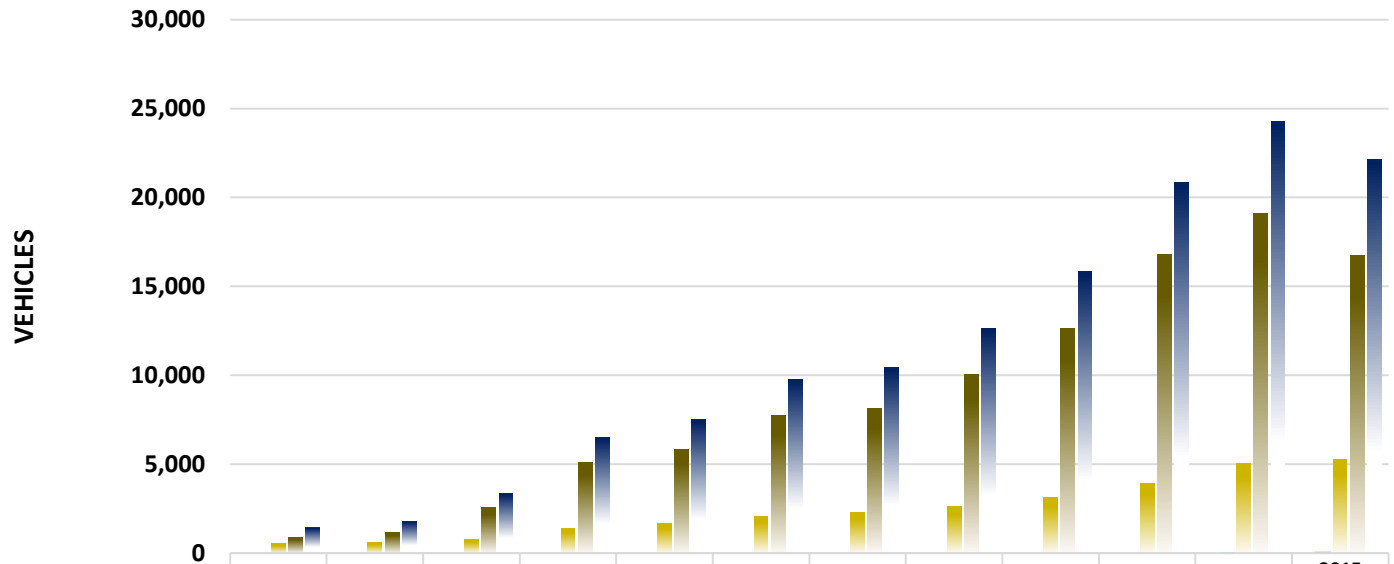
CARSHARING MARKET TRENDS IN THE AMERICAS

Member Growth in the Americas*



	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015 (Jan)
Brazil (n=1)							98	347	910	2,884	2,857	3,686
Mexico (n=1)									750	2,654	6,174	8,980
Canada (n=20)	10,001	11,932	15,663	26,878	39,664	53,916	67,526	78,856	101,502	147,794	281,675	336,058
United States (n=23)	52,347	61,658	102,993	184,292	279,234	323,681	448,574	560,572	806,332	995,926	1,337,803	1,181,087
The Americas (n=45)	62,348	73,590	118,656	211,170	318,898	377,597	516,198	639,775	909,494	1,149,258	1,628,509	1,529,811

Vehicle Growth in the Americas*



	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015 (Jan)
Brazil (n=1)							12	18	58	46	56	49
Mexico (n=1)										40	47	67
Canada (n=20)	521	599	779	1,388	1,667	2,046	2,285	2,605	3,143	3,933	5,048	5,264
United States (n=23)	907	1,192	2,561	5,104	5,840	7,722	8,120	10,019	12,634	16,811	19,115	16,754
The Americas (n=45)	1,428	1,791	3,340	6,492	7,507	9,768	10,417	12,642	15,835	20,830	24,266	22,134

* Data depicted July of each year. "N" reflects number of operators as of January 2015. Numbers include roundtrip and one-way carsharing. Numbers do not include peer-to-peer carsharing. Costa Rica excluded due to ceased operations in April 2014. SigoCar had operated in Costa Rica since 2010.

Source: Enterprise CarShare

Carsharing Market Trends in the Americas

Since 1994, 83 carsharing programs have been deployed in the Americas — 45 are operational and 38 defunct. As of January 1, 2015, there were 20 active programs in Canada, 23 in the United States (U.S.), one program in Mexico, and one in Brazil—totaling approximately 1,529,811 carsharing members sharing 22,134 vehicles in the Americas. The three largest carsharing operators in the U.S. and Canada support 95.9% and 83.2% of the total membership, respectively. Only one operator provides service in both Mexico and Brazil.

Membership: As of January 1, 2015, 20 Canadian operators claimed 336,058 members and shared 5,264 vehicles. In the U.S., 1,181,087 members shared 16,754 vehicles among 23 operators. (Note: multi-national programs with operations in both the U.S. and Canada are counted as an individual operator in each country.) Between January 2014 and January 2015, carsharing membership declined 4% in the U.S. and grew 50% in Canada. January 2015 represents the first decline in U.S. carsharing membership, which may be attributable to the closure of two operators and growing competition among mobility services. For instance, as of January 2015, IT-based public bikesharing services were available in 54 metropolitan areas and ridesourcing/ transportation network companies – prearranged for-hire driver services sourced through an online platform using a driver's personal vehicle in exchange for compensation - served 126 metropolitan regions in the U.S.

In Mexico, 8,980 members shared 67 vehicles with one operator. In Brazil, one operator claimed 3,686 members sharing 49 vehicles. Membership grew 59% in Mexico and 11% in Brazil, respectively, during this period.

Fleet Size: Additionally, between January 2014 and January 2015, carsharing fleets declined 2% in the U.S. and grew 26% in Canada. Fleets grew 34% and declined 13% in Mexico and Brazil, respectively, during this same timeframe. Seasonal winter declines in carsharing fleets are not unusual due to operators reducing winter fleets for inclement weather (e.g., snow removal).

Member-Vehicle Ratios: Member–vehicle ratios are an important metric, which can be used to assess how many customers are being served per vehicle and the relative usage level of carsharing members. As of January 2015, U.S. member-vehicle ratios were 71:1, representing a 1% decline over the previous year. In Canada, the ratio was 64:1, which was a 19% increase over the previous year. In Mexico, the ratio was 134:1, representing a 19% increase over the same period. In Brazil, the ratio was 75:1; this was a 27% increase over the previous year. During this time, average member-vehicle ratios in the Americas increased to 69:1, representing a 1% increase from January 2014.

In January 2015, U.S. for-profit programs (10 of 23) represented 43.5% of the operators and accounted for 97.9% of the members and 96.2% of vehicles. In Canada, for-profit programs (8 of 20) represented 40.0% of the operators and accounted for 95.5% of the membership and 89.9% of the fleets deployed.

Note: Numbers include roundtrip and one-way carsharing and do not include peer-to-peer carsharing.

Growth of Automakers, One-way, and Rental Cars

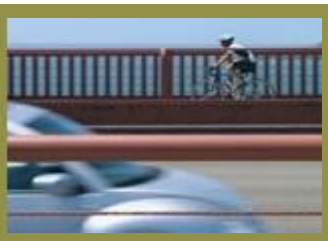
In North America, two automaker programs represented 33.5% and 30.2% of the carsharing membership and fleets deployed, respectively, in January 2015. As of June 2015, car2go and DriveNow operated in 12 American markets in the U.S. (Austin, Columbus, Denver, Los Angeles, Miami, New York City, Portland, San Diego, San Francisco, Seattle, the Twin Cities, and Washington, D.C.). As of June 2015, car2go operated in four metropolitan markets in Canada (Calgary, Montreal, Toronto, and Vancouver).

One-way (or point-to-point) carsharing allows members to pick-up a vehicle at one location and drop it off at another. As of January 2015, 35.7% of North American fleets were one-way trip capable, and 30.8% of members had access to these fleets. (Note in December 2014, Zipcar announced the launch of its one-way carsharing service in Boston with 200 vehicles.) As of January 2015, car2go, Communauto, DriveNow, Zazcar, and Zipcar offered one-way carsharing services. As of January 2015, 100% of South American fleets were one-way trip capable, and 100% of members had access to these fleets.

Worldwide, four rental car companies provide carsharing services. In North America, rental car programs represented 60.4% and 56.5% of the carsharing membership and fleets deployed, respectively, in January 2015.

Source: Communauto





Carsharing Association Conference

Mark your calendars for September 22-23, 2015 for the Carsharing Conference to be held in Vancouver, Canada. City transportation officials, public transit authorities, carsharing operators, mobility technology innovators, and auto manufacturers convene to discuss the most pressing issues in innovative mobility. The CarSharing Association (CSA) promotes cooperation among stakeholder groups to ensure that market development addresses multi-modal integration, urban congestion, clean propulsion, parking, and land-use issues. For more information, please visit: http://conference.carsharing.org/

Disrupting Mobility Summit: Shared Technology and the Future of Mobility

November 12-13, 2015: The rise of the sharing economy has disrupted existing products and services in the urban mobility space. Peer-to-peer mobility services, like Lyft and Uber, have challenged the taxi, livery, carsharing, and mass transit establishment. Disruptive innovations like this have the power to not only redefine industries, it can bankrupt companies as well. The Disrupting Mobility Summit brings together leaders from academia, industry, and government to discuss the role of disruptive innovations within mobility networks. Building upon the first Shared Mobility Summit held in 2013 in San Francisco, the 2015 Disrupting Mobility Summit is co-hosted by the University of California, Berkeley; MIT Media Lab; and the London School of Economics. We invite you to save the date and look for detailed announcements on speakers, registration, lodging, and other special events related to the summit. For more about the summit, please visit http://www.disrupting-mobility.org/

Recent Publications

Shaheen, S., N. Chan, and H. Micheaux (2015). "One-way carsharing's evolution and operator perspectives from the Americas," *Transportation*, Volume 42: 519-536. DOI: 10.1007/s11116-015-9607-0

Shaheen, S., L. Cano, and M. Camel (2015). "Exploring Electric Vehicle Carsharing as a Mobility Option for Older Adults: A Case Study of a Senior Adult Community in the San Francisco Bay Area," *International Journal of Sustainable Transportation*. bttp://dx.doi.org/10.1080/15568318.2014.962675

TSRC Methodology

Data include one-way carsharing unless otherwise stated. Roundtrip carsharing data exclude peer-to-peer carsharing numbers except for hybrid P2P carsharing. In hybrid P2P carsharing, individuals access vehicles by joining an organization that maintains its own vehicle fleet, but it also includes private autos operating throughout a network of locations. Member-vehicle numbers in the Americas are collected biannually, January and July of every year. Data are collected from each carsharing operator. Note there may be inconsistencies with a few data points compared to prior publications due to updated numbers provided by experts after a publication was released.

Please note TSRC never releases disaggregated data without the express permission of the respective operator(s). The authors would like to thank all of the operators, experts, and associations who provide member-vehicle numbers, other data, and feedback. Data and insights from this outlook should be attributed to TSRC, UC Berkeley. For more detailed market analyses (e.g., longitudinal growth numbers in the Americas), please see: http://imr.berkeley.edu.

TSRC Shared Mobility Research Team:
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ABOUT TSRC

The Transportation Sustainability Research Center (TSRC) was formed in 2006. TSRC is managed by the Institute of Transportation Studies of the University of California, Berkeley. It is headquartered at Berkeley's Global Campus at Richmond Bay.

TSRC uses a wide range of analysis and evaluation tools including: questionnaires, interviews, focus groups, automated data collection systems, GIS, and simulation models to collect data and perform analysis and interpret data. The center develops impartial findings and recommendations for key issues of interest to industry and policy makers to aid in decision making. TSRC has assisted in developing and implementing major California and federal regulations and initiatives regarding sustainable transportation including: zero emission vehicle credits for carsharing vehicles as part of the Zero Emission Vehicle (ZEV) Mandate in California. Others include the California Global Warming Solutions Act (AB 32), the Low Emission Vehicle Program, the California Clean Cars Program (AB 1493), Low Carbon Fuel Standards policies, Sustainable Communities and Climate Protection Act (SB 375), and the federal Energy Independence and Security Act of 2007.

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