

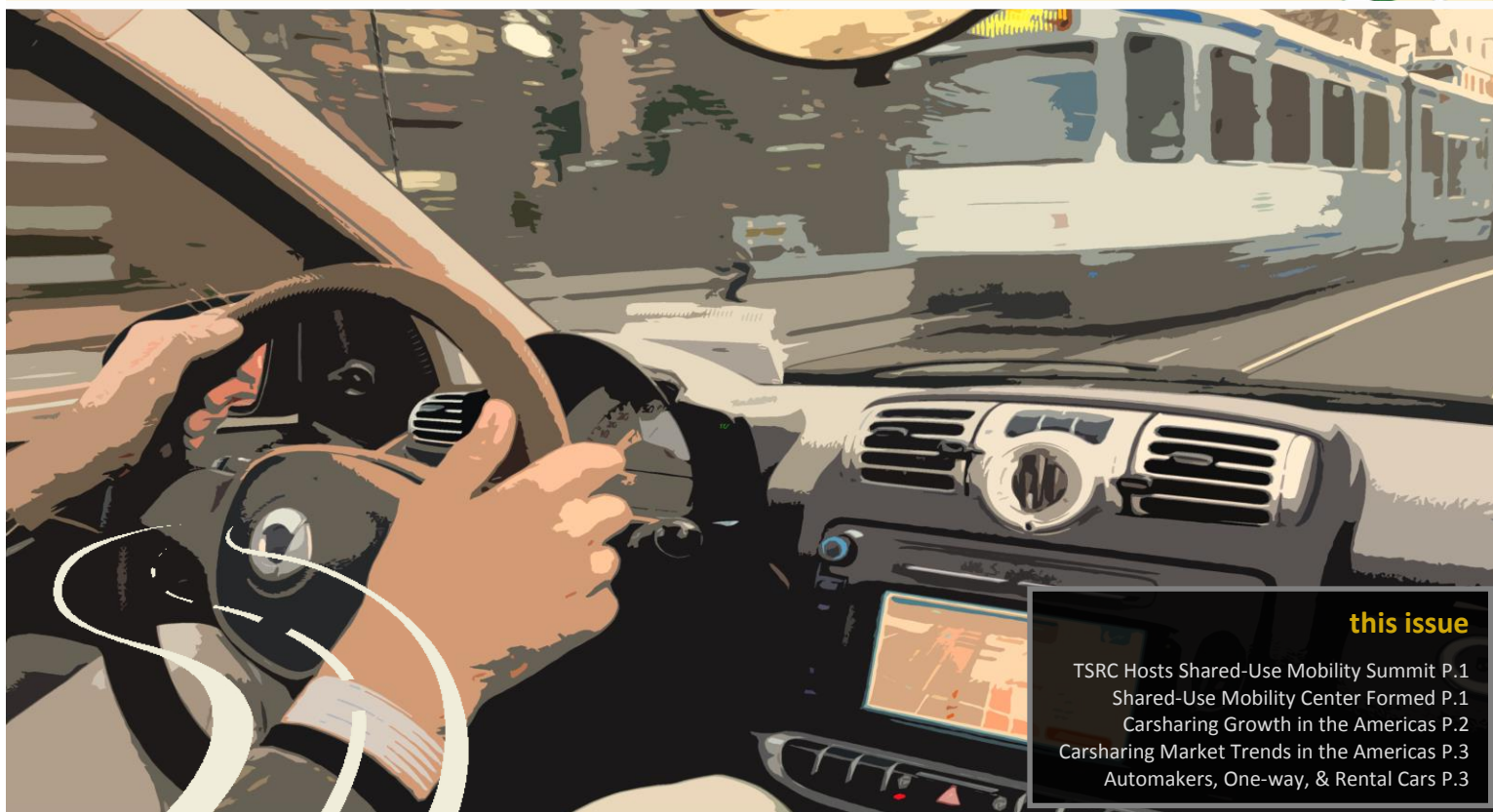
INNOVATIVE MOBILITY CARSHARING OUTLOOK

CARSHARING MARKET OVERVIEW, ANALYSIS, AND TRENDS ▪ Summer 2014

TRANSPORTATION SUSTAINABILITY RESEARCH CENTER - UNIVERSITY OF CALIFORNIA, BERKELEY

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TSRC Hosts Shared-Use Mobility Summit

In October 2013, TSRC hosted the inaugural Shared-Use Mobility Summit in San Francisco, a two-day event facilitating a lively dialogue among mobility providers, policymakers, governmental agencies, non-profits, affiliated industries, technologists, academics, and other stakeholders on the current state of the practice, opportunities, and obstacles to market expansion in the fields of carsharing, public bikesharing, ridesharing, on-demand ride services, employer shuttles, and related sharing economy affiliates. Day One featured sessions on industry trends, success stories, the sharing economy, impacts, and micro-level policy approaches. With the support of the Rockefeller Foundation and Transportation for America, the evening session featured a spotlight panel discussion on macro-level government policy and the role of shared-use mobility on transportation policy and planning. Day Two featured sessions on multi-modality and transit integration, insurance, education and outreach, funding, and shared-use sector breakout sessions. The summit concluded with a session highlighting the future of shared-use mobility. TSRC would like to thank the summit's sponsors, partners, organizing committee, and participants for supporting this collaborative endeavor.

Video: <http://sharedusemobilitycenter.org/summits/shared-use-mobility-summit/video-from-day-1/>

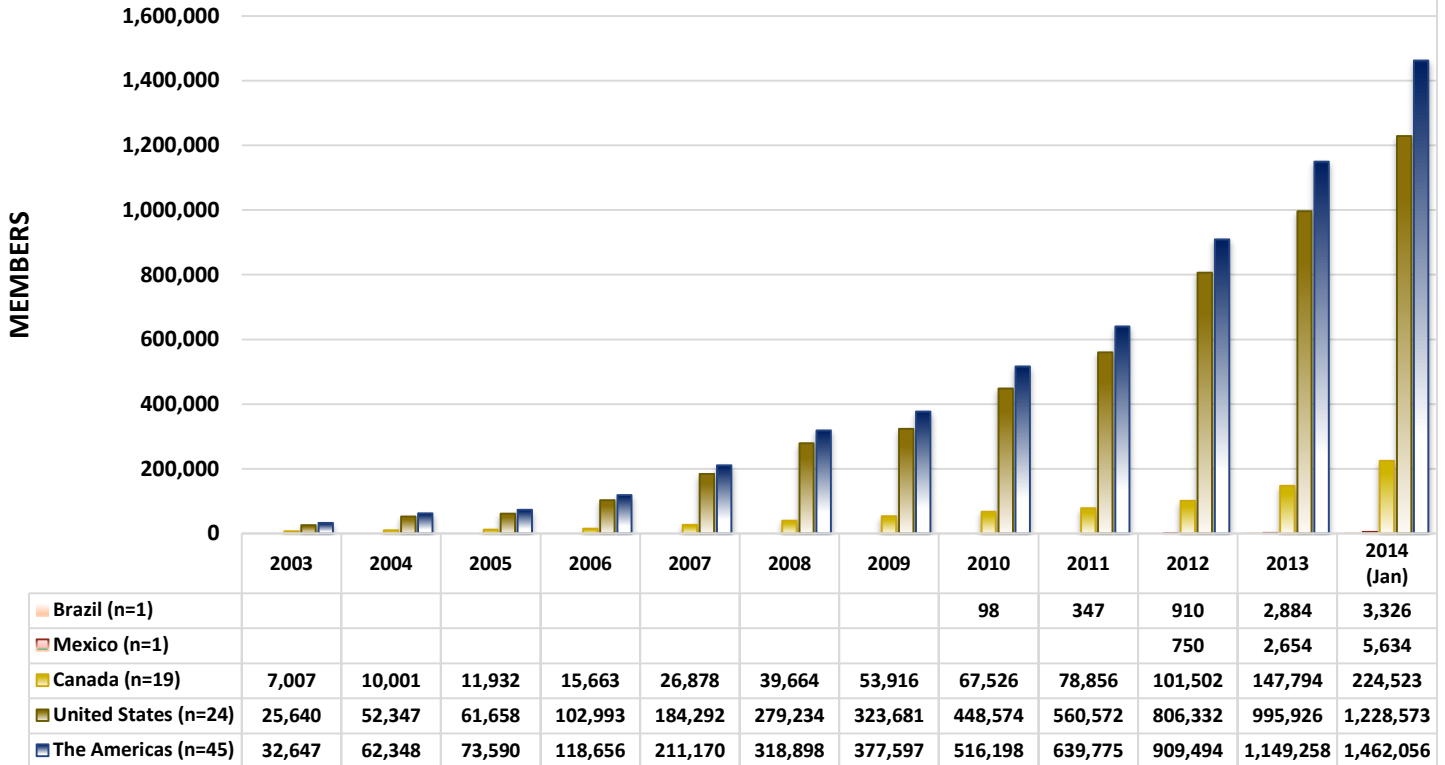
White Paper: <http://sharedusemobilitycenter.org/summits/shared-use-mobility-summit/retrospective-from-the-summit/>

Shared-Use Mobility Center (SUMC) Launched at Innovation in Mobility Public Policy Summit

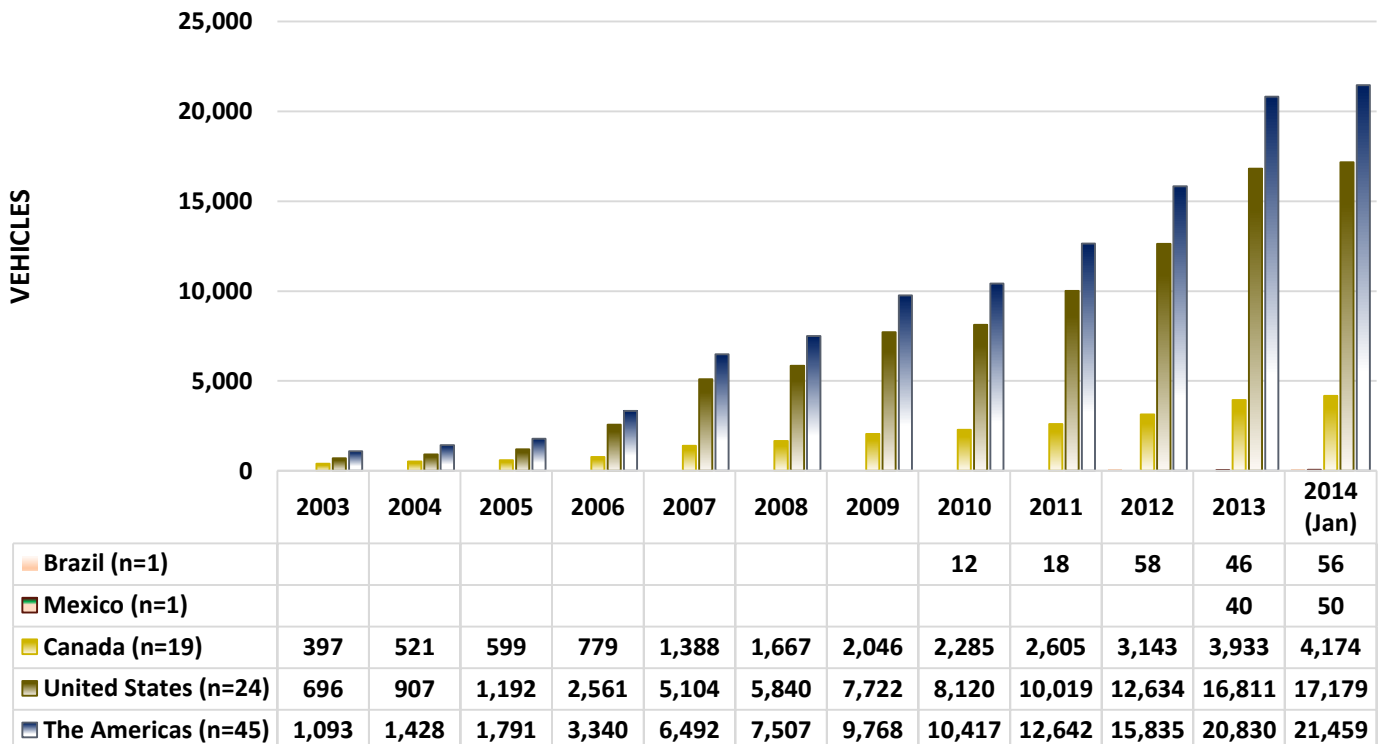
The Innovation in Mobility Public Policy Summit was held June 10-11, 2014 in Washington, D.C. Building upon the success of the inaugural Shared-Use Mobility Summit in San Francisco, transportation professionals discussed innovative developments in shared mobility and fostered collaboration among federal, state, and local governments and private sector mobility providers. Industry leaders capitalized on the momentum generated through the October 2013 Summit and launched the Shared-Use Mobility Center (SUMC). SUMC is a public interest partnership dedicated to achieving universal, affordable, and sustainable mobility in urban and metropolitan regions of the U.S. through efficient sharing of transportation assets. For more information, please visit www.sharedusemobilitycenter.org.

CARSHARING MARKET TRENDS IN THE AMERICAS

Member Growth in the Americas*



Vehicle Growth in the Americas*



*Data depicted July of each year, except for January 2014. "N" reflects number of operators as of January 2014. Numbers include round-trip and one-way carsharing. Numbers do not include peer-to-peer carsharing.



Source: Vancouver Observer

CARSHARING MARKET TRENDS IN THE AMERICAS

Since 1994, 79 carsharing programs have been deployed in the Americas — 45 are operational and 34 defunct. As of January 1, 2014, there were 19 active programs in Canada, 24 in the United States (U.S.), one program in Mexico, and one in Brazil—totaling approximately 1,462,056 carsharing members sharing 21,459 vehicles in the Americas. The three largest providers in the U.S. and Canada support 87.2% and 85.7% of total membership, respectively. Only one operator provides service in both Mexico and Brazil.

As of January 1, 2014, 19 Canadian operators claimed 224,523 members and shared 4,174 vehicles. In the U.S., 1,228,573 members shared 17,179 vehicles among 24 operators. In Mexico, 5,634 members shared 50 vehicles among one operator. In Brazil, one operator claimed 3,326 member sharing 56 vehicles. (Note: multi-national programs with operations in both the U.S. and Canada are counted as an individual operator in each country.) Between January 2013 and January 2014, carsharing membership grew 38% in the U.S. and 59% in Canada. Membership grew 809% and 15% in Mexico and Brazil, respectively during this period. Additionally, between January 2013 and January 2014, carsharing fleets grew 42% in the United States and 22% in Canada. Fleets grew 25%

and 22% in Mexico and Brazil, respectively during this timeframe.

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 2014, U.S. member-vehicle ratios were 72:1, representing a 13% increase over the previous year. In Canada, the ratio was 54:1 representing a 69% increase over the previous year. In Mexico, the ratio was 113:1 representing a 606% increase over the same period. In Brazil, the ratio was 59:1, representing a 6% decline over the previous year. During this period, member-vehicle ratios in the Americas increased to 68:1, representing a 48% increase from January 2013.

In January 2013, U.S. for-profit programs (11 of 23) represented 47.8% of the operators and accounted for 98.0% of the members and 96.1% of vehicles. In Canada, for-profit programs (9 of 19) represented 47.3% of the operators and accounted for 94.4% of the membership and 90.0% of the fleets deployed.

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

GROWTH OF AUTOMAKERS, ONE-WAY, AND RENTAL CARS

In North America, two automaker programs represented 22.4% and 21.6% of the carsharing membership and fleets deployed, respectively, in January 2014. As of August 2014, car2go and DriveNow operated in 11 American markets in the U.S. (Austin, Columbus, Denver, Los Angeles, Miami, Portland, San Diego, San Francisco, Seattle, the Twin Cities, and Washington D.C.). As of August 2014, car2go operated in four metropolitan markets in Canada (Calgary, Montréal, 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 2014, car2go, Communauto, and DriveNow offered one-way carsharing services. As of January 2014, 22.6% of North American fleets were one-way trip capable, and 24.4% of members had access to these fleets. In May 2014, Zipcar announced that it was testing and would launch one-way service in select markets in late-2014. Bolloré Group (founder of Paris' Autolib) will be launching an electric vehicle one-way carsharing service called BlueIndy in Indianapolis, Indiana in late-2014.

Worldwide, five rental car companies provide carsharing services. In North America, rental car programs represented 72.0% and 66.3% of the carsharing membership and fleets deployed, respectively, in January 2014. This represents a decrease from 79.0% of membership and an increase from 63.1% of fleets in January 2013.



Source: Yahoo Finance



Shared-Use Mobility Summit White Paper Now Available

The Shared-Use Mobility Summit White Paper discusses the state of the industry and trends in major shared-use mobility sectors: carsharing (including roundtrip, one-way, and peer-to-peer); bikesharing; ridesharing; and on-demand ride services (e.g., uberX, Lyft, and Sidecar). The paper also summarizes summit sessions and highlights issues discussed at the event including: 1) scaling of the shared-use mobility sector; 2) integration of shared-use mobility services and public transit; and 3) micro-and macro-policy considerations related to insurance, taxation, and parking.

Available for download at:

<http://www.sharedusemobilitycenter.org/summits/shared-use-mobility-summit/retrospective-from-the-summit/>

Recent Publications

Martin, Elliot and Susan Shaheen (2014). "Evaluating Public Transit Modal Shift Dynamics in Response to Bikesharing: A Tale of Two U.S. Cities," *Journal of Transport Geography*.

<http://dx.doi.org/10.1016/j.jtrangeo.2014.06.026>. (In Press)

Shaheen, Susan, Elliot Martin, and Adam Cohen (2013). "Public Bikesharing and Modal Shift Behavior: A Comparative Study of Early Bikesharing Systems in North America," *International Journal of Transportation*. Vol. 1, No. 1, pp. 35-53.

Shaheen, Susan, Adam Cohen, and Elliot Martin (2013). "Public Bikesharing in North America: Early Operator Understanding and Emerging Trends," *Transportation Research Record*, No. 2387, pp. 83-92. DOI: 10.3141/2387-10.

Zhang, Hua, Susan Shaheen, Kingpeng Chen (2013). "Bicycle Evolution in China: From the 1990s to Present." *International Journal of Sustainable Transportation*. DOI: 10.1080/15568318.2012.699999.

TSRC Methodology

Data include one-way carsharing unless otherwise stated. Classic carsharing data exclude personal vehicle sharing numbers except for hybrid P2P carsharing. In hybrid P2P carsharing, individuals access vehicles by joining an organization that maintains its own fleet of vehicles, 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 www.imr.berkeley.edu.

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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 the university's Richmond Field Station.

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 interpretation of the 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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Summer 2014

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