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Shared Mobility Trends: 2015 - 2016

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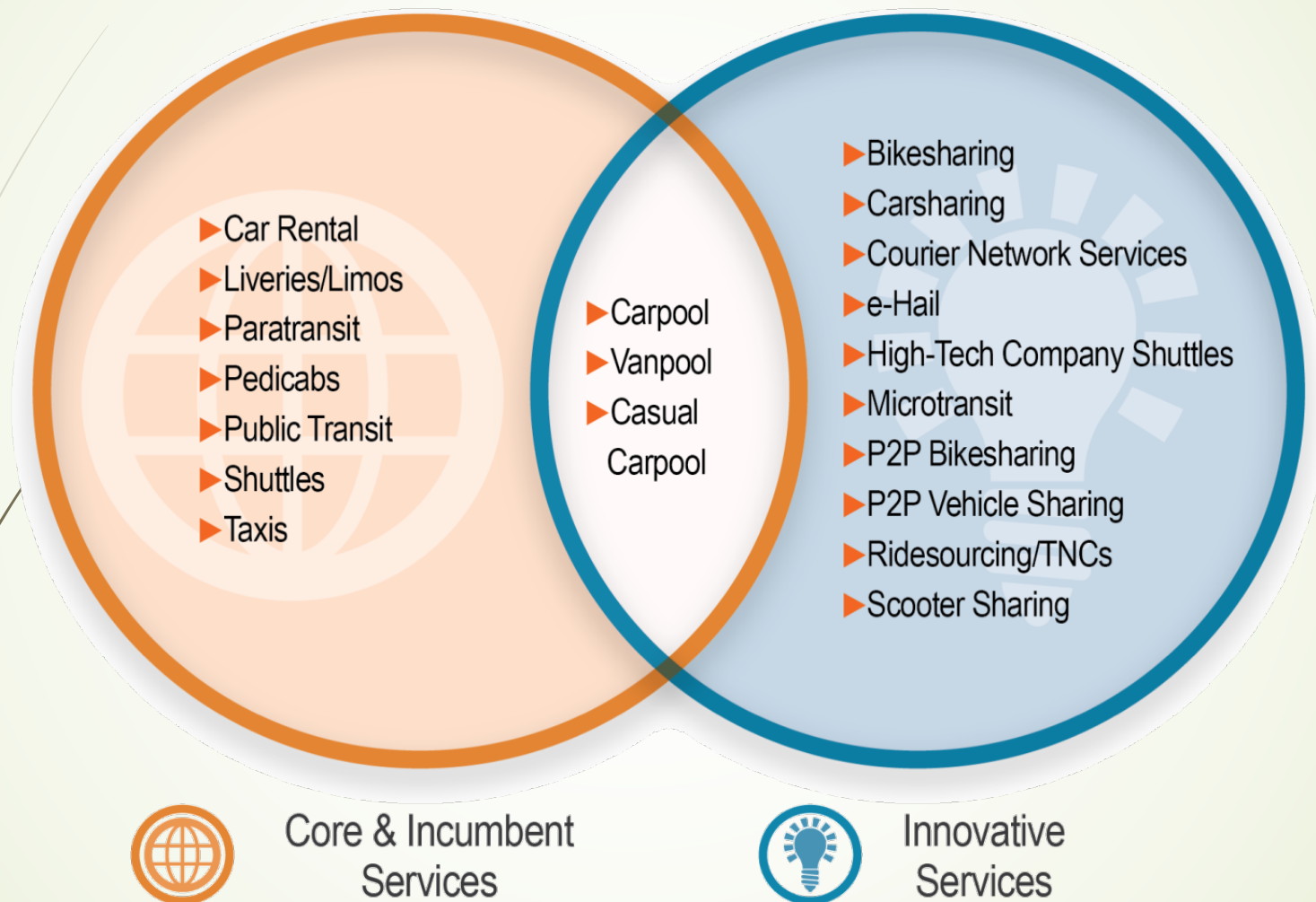Transportation Research Board Annual Meeting
Workshop 138
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Overview

- **Shared-Use Mobility Trends & Developments**
  - Ecosystem Overview
  - Carsharing
  - Bikesharing
  - Ridesourcing
  - E-Hail
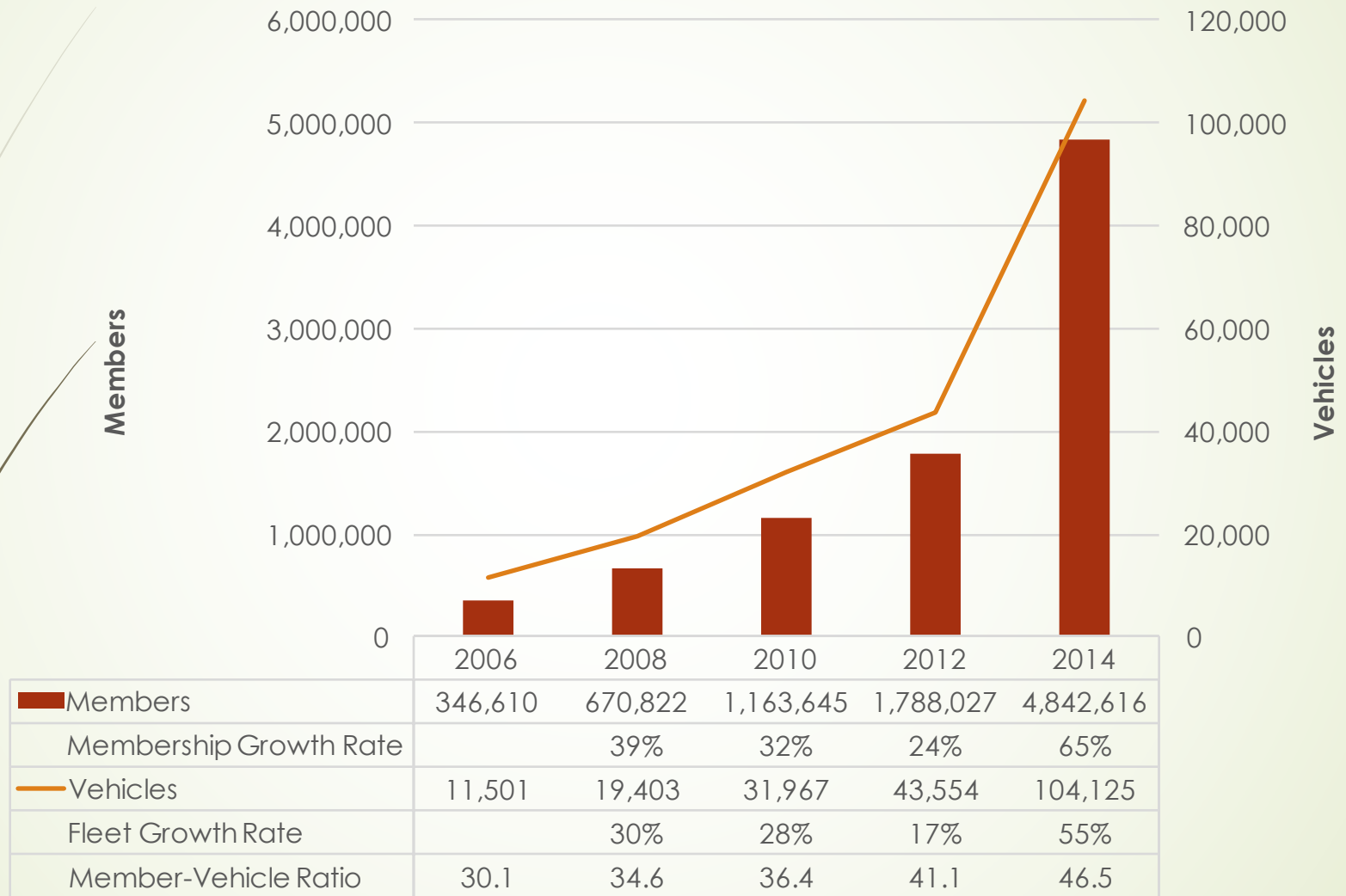- **Summary**
- **Acknowledgements**

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Ecosystem Overview

Core & Incumbent Services
- Car Rental
- Liveries/Limos
- Paratransit
- Pedicabs
- Public Transit
- Shuttles
- Taxis

- Carpool
- Vanpool
- Casual Carpool

Innovative Services
- Bikesharing
- Carsharing
- Courier Network Services
- e-Hail
- High-Tech Company Shuttles
- Microtransit
- P2P Bikesharing
- P2P Vehicle Sharing
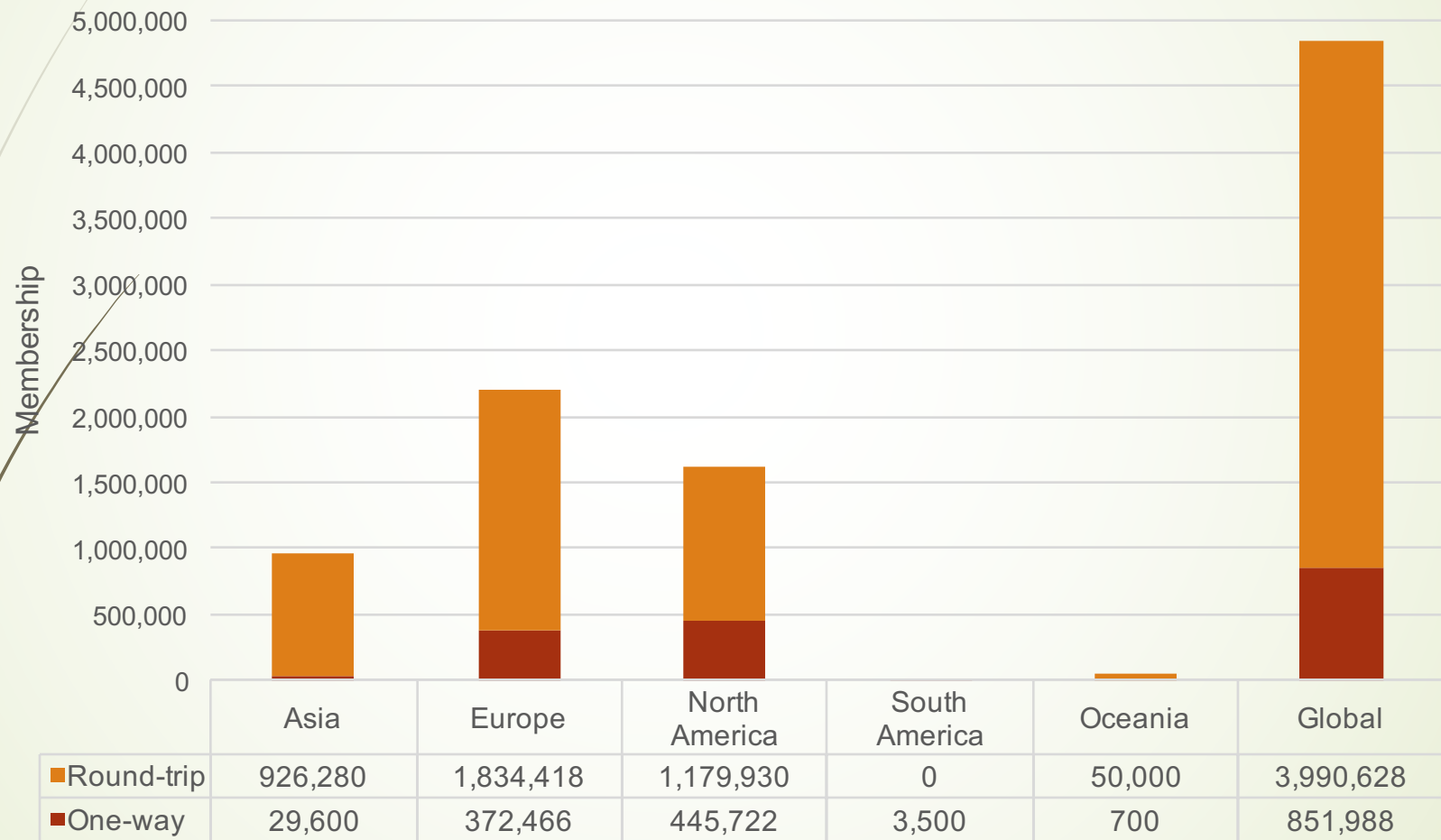- Ridesourcing/TNCs
- Scooter Sharing

Forthcoming: FHWA

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Global Carsharing Trends

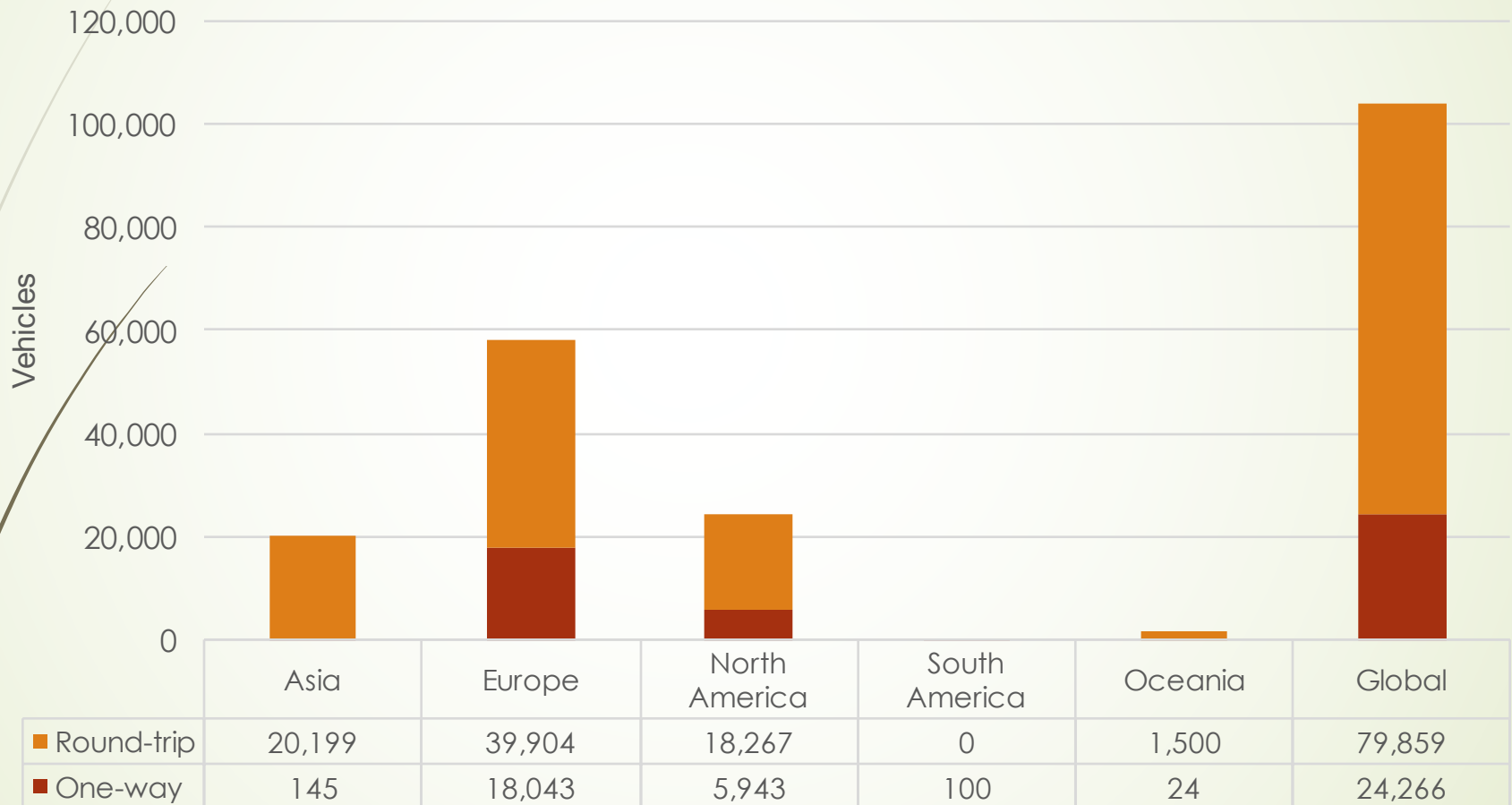|	2006	2008	2010	2012	2014
Members	346,610	670,822	1,163,645	1,788,027	4,842,616
Membership Growth Rate		39%	32%	24%	65%
Vehicles	11,501	19,403	31,967	43,554	104,125
Fleet Growth Rate		30%	28%	17%	55%
Member-Vehicle Ratio	30.1	34.6	36.4	41.1	46.5

Shaheen and Cohen, 2015

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Global Carsharing Trends

Roundtrip and One-way Global Membership

	Asia	Europe	North America	South America	Oceania	Global
Round-trip	926,280	1,834,418	1,179,930	0	50,000	3,990,628
One-way	29,600	372,466	445,722	3,500	700	851,988

Shaheen and Cohen, 2015

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Global Carsharing Trends

Roundtrip and One-way Global Membership

	Asia	Europe	North America	South America	Oceania	Global
■ Round-trip	20,199	39,904	18,267	0	1,500	79,859
■ One-way	145	18,043	5,943	100	24	24,266

Y-axis: Vehicles (0 – 120,000)

Shaheen and Cohen, 2015

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Some Carsharing Highlights: 2015-16

▶ Zipcar announces ZipLabs will work with University of Michigan on shared automated vehicles

▶ Carma Carpooling acquires City CarShare in 2015

▶ Audi to launch "Audi at Home" carsharing in San Francisco and Miami

▶ Fare integration between HOURCAR and Metro Transit in the Twin Cities

▶ P2P carsharing, RelayRides, rebrands as "Turo"

▶ Scoot Networks introduced the Nissan-branded Twizy (electric quadricycle)

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Worldwide and US Bikesharing

World:

➤ 980 cities with IT-based bikesharing accounting for 1,258,500 bicycles and 9,300 e-bikes (December 2015)

U.S.

➤ 30,750 bikes at 3,200 stations across 87 IT-based public bikesharing programs in the United States (October 2015)
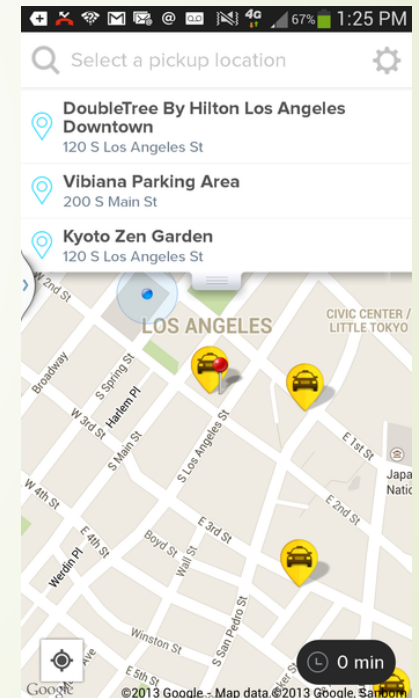
(Meddin, 2015)

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Some Bikesharing Highlights: 2015-16

- North American Bike Share Association (NABSA) establishes open data standard

- Free-floating bikesharing (SoBi)

- P2p Bikesharing (Spinlister)

- Campus-based systems (Zagster, SoBi)

- E-bikesharing & carsharing

- Launch of first e-bikesharing program in Birmingham, AL in October 2015

- Keyless bike locks (e.g., BitLock)

- Partnership between BCycle and RideScout's mobile payment subsidiary, GlobeSherpa

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Ridesourcing/E-Hail Market Trends: 2015-16

- Sidecar ceases operations

- Lyft: 195 cities; over 315,000 drivers

- Uber: 68 countries; over 360 cities; hundreds of thousands of drivers signing up globally per month

- Easy Taxi: 18 countries; 400 cities

- Curb: 60 cities; 90 cab companies; over 35,000 taxis

- mytaxi: 5 countries; 20 cities

- Flywheel: 6 cities; over 5,000 drivers

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Ridesourcing Highlights: 2015-16

- Continued expansion of ridesplitting: LyftLine and UberPOOL

- Uber rolls out back-to-back trips feature allowing drivers to be matched with nearby ride requests before completing a ride in-progress

- GM investment of $500M in Lyft and gets a seat on its board

  - Opportunity to link automated and connected vehicle technologies with ridesourcing

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E-Hail Highlights: 2015-16

- San Francisco's oldest taxi firm (DeSoto) rebrands itself as Flywheel

- California Division of Measurement Standards approves Flywheel's smartphone taxi meter (TaxiOS)

  - TaxiOS will offer new features such as fare splitting, dynamic pricing, last-mile deliveries, and app-based payments

- San Francisco's Yellow Cab files for bankruptcy

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E-Hail Highlights: 2015-16

- NYC launches Arro taxi app after beta testing with 7,000 cabs

- Bandwagon (taxi sharing app) expands to JFK and LaGuardia airports

- The Ride app launched in 35 Canadian cities in December 2015

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Published Research Highlights: 2015

- Bikesharing in San Francisco white paper

- EV carsharing white paper

- Insurance carsharing study **(2016 TRB presentation)**

- Blablacar carpooling equity study **(2016 TRB presentation)**

- Holistic guide to shared mobility

- Zipcar employer carsharing impact study

- Shared mobility services and vehicle automation paper

For more about these and other studies, please visit http://tsrc.berkeley.edu and http://imr.berkeley.edu

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Research Highlights: 2016

- Bikesharing GHG impacts study

- One-way carsharing study

- P2P GHG impacts study

- Mobility On Demand (MOD) study for FHWA

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- Russell Meddin, The Bike-sharing World Map

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