

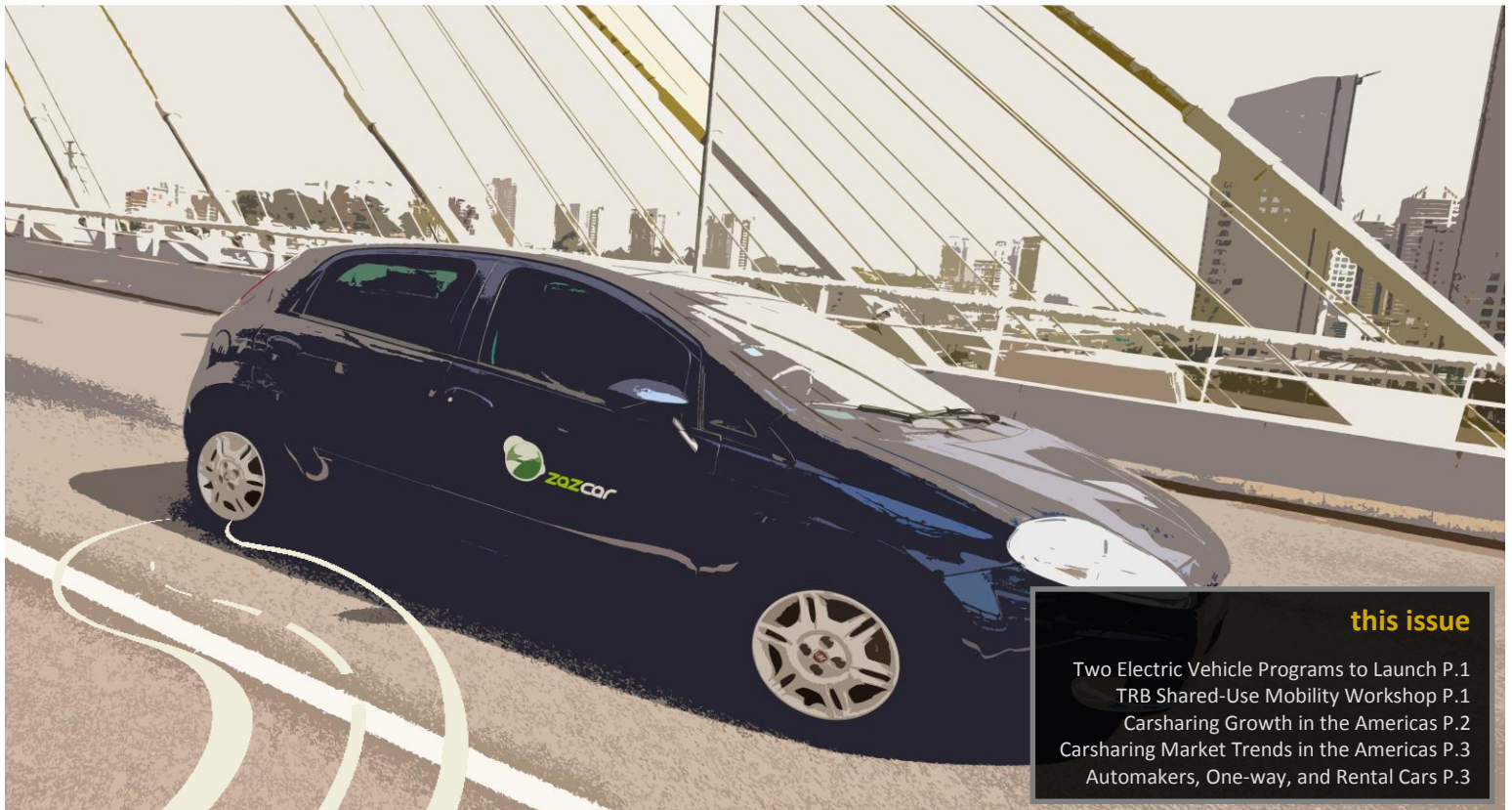
INNOVATIVE MOBILITY CARSHARING OUTLOOK

CARSHARING MARKET OVERVIEW, ANALYSIS, AND TRENDS ▪ Fall 2014

TRANSPORTATION SUSTAINABILITY RESEARCH CENTER - UNIVERSITY OF CALIFORNIA, BERKELEY

By Susan Shaheen, Ph.D. and Adam Cohen

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Two Electric Vehicle Programs to Launch

Two large all electric carsharing programs will be launching in Las Vegas, Nevada and Indianapolis, Indiana in 2014-2015.

In Las Vegas, SHIFT carsharing will be launching in late-2014. SHIFT will feature two services “CoreDrive” and “CityDrive.” CoreDrive will feature a fleet of Smart and Chevrolet Volt electric vehicles designed for short trips within downtown Las Vegas. CityDrive will feature longer-range Tesla Model S vehicles intended for longer trips around the greater Las Vegas metropolitan area. SHIFT members will also have access to a trolley service and SHIFT bikesharing. Both CoreDrive and CityDrive will feature one-way and round-trip service options. SHIFT will also be featuring a valet service that picks up a reserved vehicle, drives the member, and returns the vehicle on the member’s behalf. The service will be based on valet credits that are redeemable for a one-way valet trip. The number of valet credits required will vary based on the user’s origin and destination. The number of complimentary valet credits issued to a member varies based on the user’s membership level.

Puteaux-based Bolloré, a French conglomerate and manufacturer of Bluecar and operator of Paris’ Autolib carsharing service will be launching BlueIndy carsharing in Indianapolis in early-2015. The system will feature Bolloré’s Bluecar, an all-electric vehicle with a range of 150 miles on a single charge. The Bluecar will feature advanced telematics enabling the user to find and reserve parking, display real-time alerts, remember a member’s radio station presets, and feature the “blue button” to dial BlueIndy’s call center. Approximately 200 vehicle locations are planned throughout Indianapolis, providing its members with one-way and round-trip service options.

94th Transportation Research Board Annual Meeting Shared-Use Mobility Workshop

Sunday, January 11, 2015 - Washington, D.C.

Walter E. Washington Convention Center - Room 114C

Shared-Use Mobility: What Does the Future Hold?

Sponsored by the Emerging and Innovative Public Transport and Technologies Committee and Automated Transit Systems Committee

Part 1: 9:00 a.m. – Noon

Part 2: 1:30-4:30 p.m.

Morning and afternoon workshop sessions feature speakers from the Innovation in Mobility Public Policy Summit, held in Washington, D.C., in June 2014. Thought leaders on the subject—from industry, government, and academia— will make presentations and participate in panel discussions with the audience.

Session includes:

- Highlights from Innovation in Mobility Public Policy Summit
- Setting the Stage: What’s New in Shared-Use Mobility?
- From Dumb Wallets to Smart Cards: How Did You Pay For That?
- One Stop Shopping for Mobility
- Fast Forward Future: Connected Vehicle Innovations and Their Future Impact
- Group Discussion and Final Wrap Up.

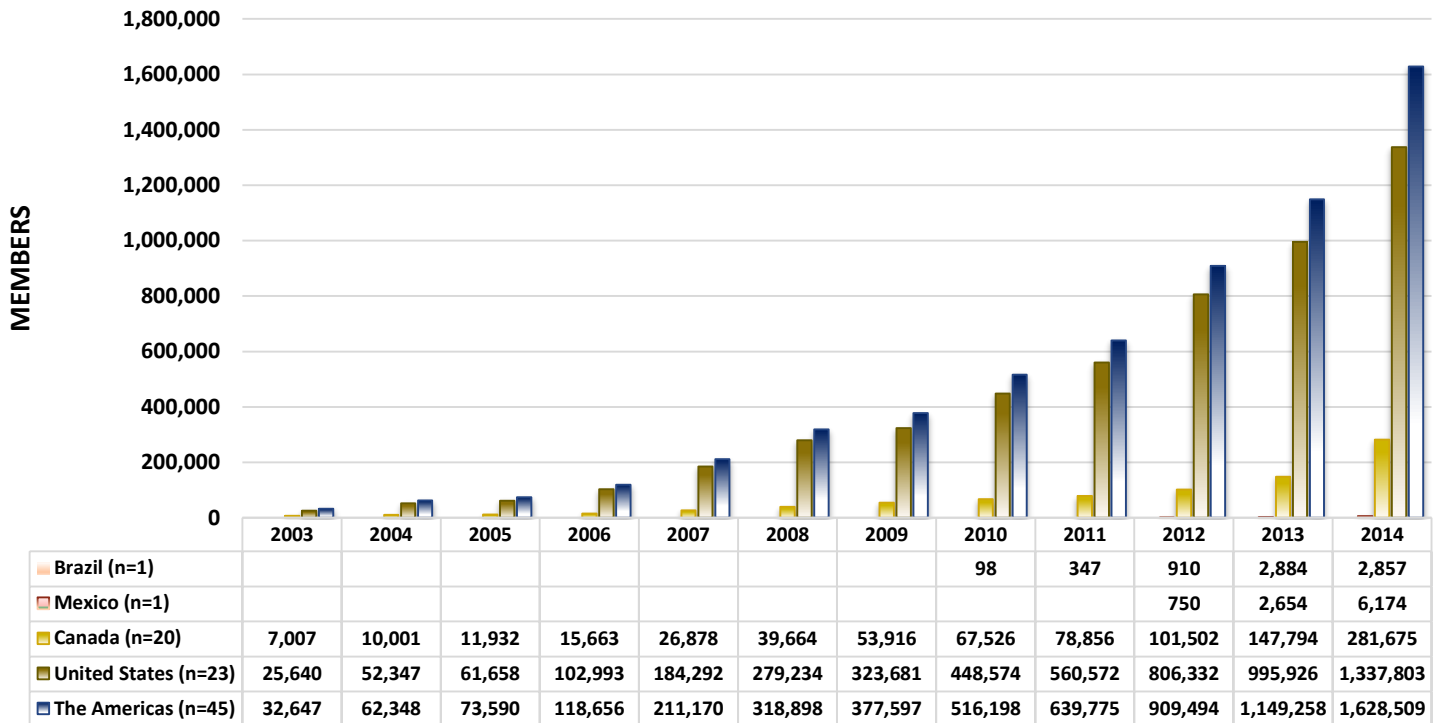
Note: There is no additional charge for this workshop.

For more information, please visit:

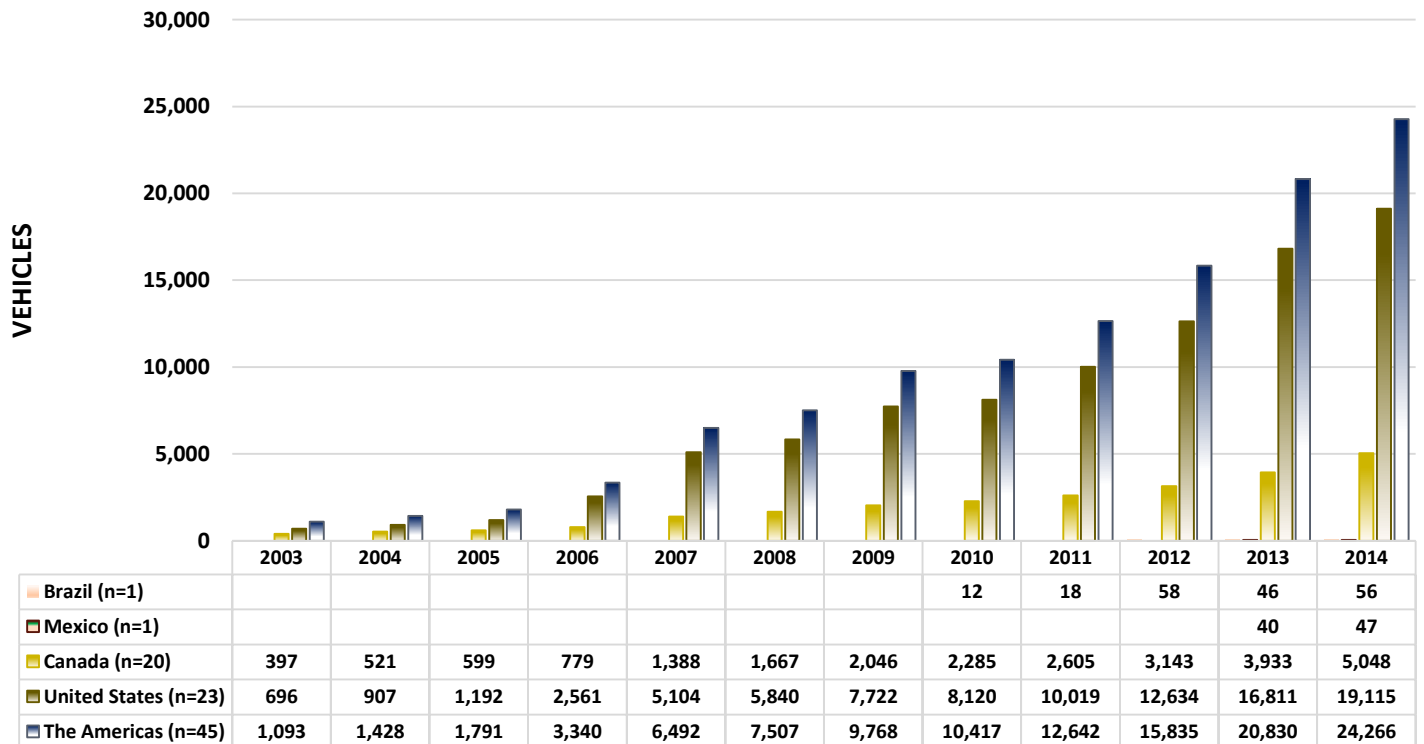
<http://www.trb.org/AnnualMeeting2015/AM2015Program.aspx>

CARSHARING MARKET TRENDS IN THE AMERICAS

Member Growth in the Americas*



Vehicle Growth in the Americas*



*Data depicted July of each year. "N" reflects number of operators as of July 2014. Numbers include round-trip 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: Buffalo CarShare

CARSHARING MARKET TRENDS IN THE AMERICAS

Since 1994, 80 carsharing programs have been deployed in the Americas — 45 are operational and 35 defunct. As of July 1, 2014, there were 20 active programs in Canada, 23 in the United States (U.S.), one program in Mexico, and one in Brazil—totaling approximately 1,628,509 carsharing members sharing 24,266 vehicles in the Americas. The three largest carsharing operators in the U.S. and Canada support 87.1% and 83.7% of the total membership, respectively. Only one operator provides service in both Mexico and Brazil.

As of July 1, 2014, 20 Canadian operators claimed 281,675 members and shared 5,048 vehicles. In the U.S., 1,337,803 members shared 19,115 vehicles among 23 operators. In Mexico, 6,174 members shared 47 vehicles with one operator. In Brazil, one operator claimed 2,857 members 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 July 2013 and July 2014, carsharing membership grew 34% in the U.S. and 91% in Canada. Membership grew 133% in Mexico and declined 0.9% in Brazil, respectively, during this period. Additionally, between July 2013 and July 2014, carsharing fleets grew 14% in the United States and 28% in Canada.

Fleets grew 18% and 22% in Mexico and Brazil, respectively, during this same 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 July 2014, U.S. member-vehicle ratios were 70:1, representing a 19% increase over the previous year. In Canada, the ratio was 56:1, which was a 47% increase over the previous year. In Mexico, the ratio was 131:1, representing a 98% increase over the same period. In Brazil, the ratio was 51:1; this was a 19% decline over the previous year. During this period, average member-vehicle ratios in the Americas increased to 67:1, representing a 22% increase from July 2013.

In July 2014, U.S. for-profit programs (11 of 23) represented 47.8% of the operators and accounted for 98.1% of the members and 96.7% of vehicles. In Canada, for-profit programs (8 of 20) represented 40.0% of the operators and accounted for 95.2% of the membership and 90.7% of the fleets deployed.

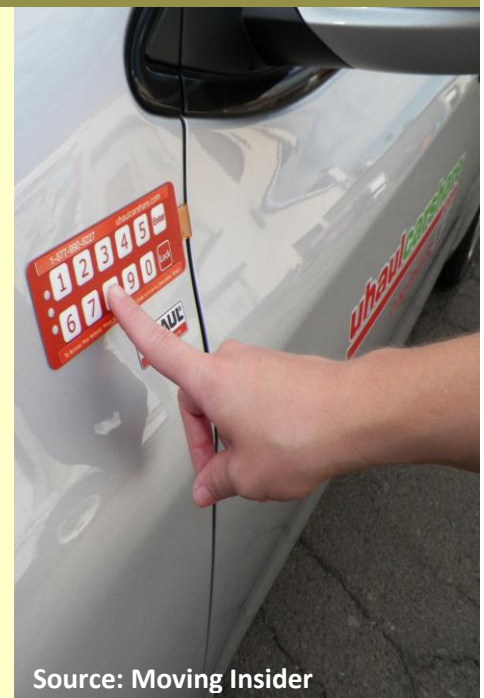
Note: Numbers include round-trip and one-way carsharing. Numbers do not include peer-to-peer carsharing.

GROWTH OF AUTOMAKERS, ONE-WAY, AND RENTAL CARS

In North America, two automaker programs represented 25.3% and 24.1% of the carsharing membership and fleets deployed, respectively, in July 2014. As of October 2014, 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 October 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 July 2014, car2go, Communauto, and DriveNow offered one-way carsharing services. As of July 2014, 24.5% of North American fleets were one-way trip capable, and 26.4% of members had access to these fleets. In May 2014, Zipcar announced that it was testing and would launch a one-way service in select markets in late-2014. In late-2014, SHIFT carsharing will be launching service in Las Vegas providing a combination of one-way and round-trip service options with electric vehicles. Additionally, Bolloré Group (founder of Paris' Autolib) will be launching an electric vehicle one-way carsharing service called BlueIndy in Indianapolis, Indiana in early-2015.

Worldwide, five rental car companies provide carsharing services. In North America, rental car programs represented 67.0% and 64.7% of the carsharing membership and fleets deployed, respectively, in July 2014.



Source: Moving Insider



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.

INNOVATIVE MOBILITY CARSHARING OUTLOOK

Fall 2014

Upcoming Events

94th Annual Transportation Research Board Meeting

January 11-15, 2015: The TRB Annual Meeting program covers all transportation modes, with more than 4,500 presentations in nearly 800 sessions and workshops addressing topics of interest to all attendees — policy makers, administrators, practitioners, researchers, and representatives of government, industry, and academic institutions. A number of sessions and workshops will address the spotlight theme for 2015: **Corridors to the Future: Transportation and Technology**. There will be shared-use vehicle presentations, posters, and committee meetings at this event. There is a free, one-day workshop on Sunday, January 11, 2015, titled: "Shared-Use Mobility: What Does the Future Hold?" For more about the workshop, please see Page 1. For more information about the 94th Annual TRB meeting, please visit www.trb.org.

Recent Publications

Shaheen, Susan, Elliot Martin, Nelson Chan, Adam Cohen, and Mike Pogodzinski. Public Bikesharing in North America During A Period of Rapid Expansion: Understanding Business Models, Industry Trends, and User Impacts. Research Report 12-29. San Jose: Mineta Transportation Institute (2014). <http://transweb.sjsu.edu/project/1131.html>

Ingrid Ballus-Armet, Susan Shaheen, Kelly Clonts, and David Weinzimmer. "Peer-to-Peer Carsharing: Exploring Public Perception and Market Characteristics in the San Francisco Bay Area, California," Transportation Research Record No. 2416, pp. 27-36.

Rayle, Lisa, Susan Shaheen, Nelson Chan, Danielle Dai, and Robert Cervero. App-Based, On-Demand Ride Services: Comparing Taxi and Ridesourcing Trips and User Characteristics in San Francisco. UCTC-FR-2014-08. Berkeley: University of California Transportation Center (2014). <http://tsrc.berkeley.edu/node/797>

Shaheen, Susan and Matt Christensen. Retrospective from North America's First Gathering on Shared-Use Mobility. Berkeley: Transportation Sustainability Research Center (2014). <http://tsrc.berkeley.edu/node/778>

Martin, Elliot and Susan Shaheen. "Evaluating Public Transit Modal Shift Dynamics in Response to Bikesharing: A Tale of Two U.S. Cities," Journal of Transport Geography (2014), Volume 41, pp. 315-324. DOI: 10.1016/j.jtrangeo.2014.06.026.

TSRC Methodology

Data include one-way carsharing unless otherwise stated. Classic 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 www.imr.berkeley.edu.

TSRC Shared-Use Vehicle Research Team:

Susan Shaheen, Ph.D.; Adam Cohen; Elliot Martin Ph.D.; Rachel Finson; Matt Christensen; Nelson Chan

TRANSPORTATION SUSTAINABILITY RESEARCH CENTER

1301 S. 46th Street
Richmond Field Station (RFS), Building 190
Richmond, California 94804

Office: (510) 665-3467
Fax: (510) 665-2128
<http://www.imr.berkeley.edu>
<http://www.tsrc.berkeley.edu>

