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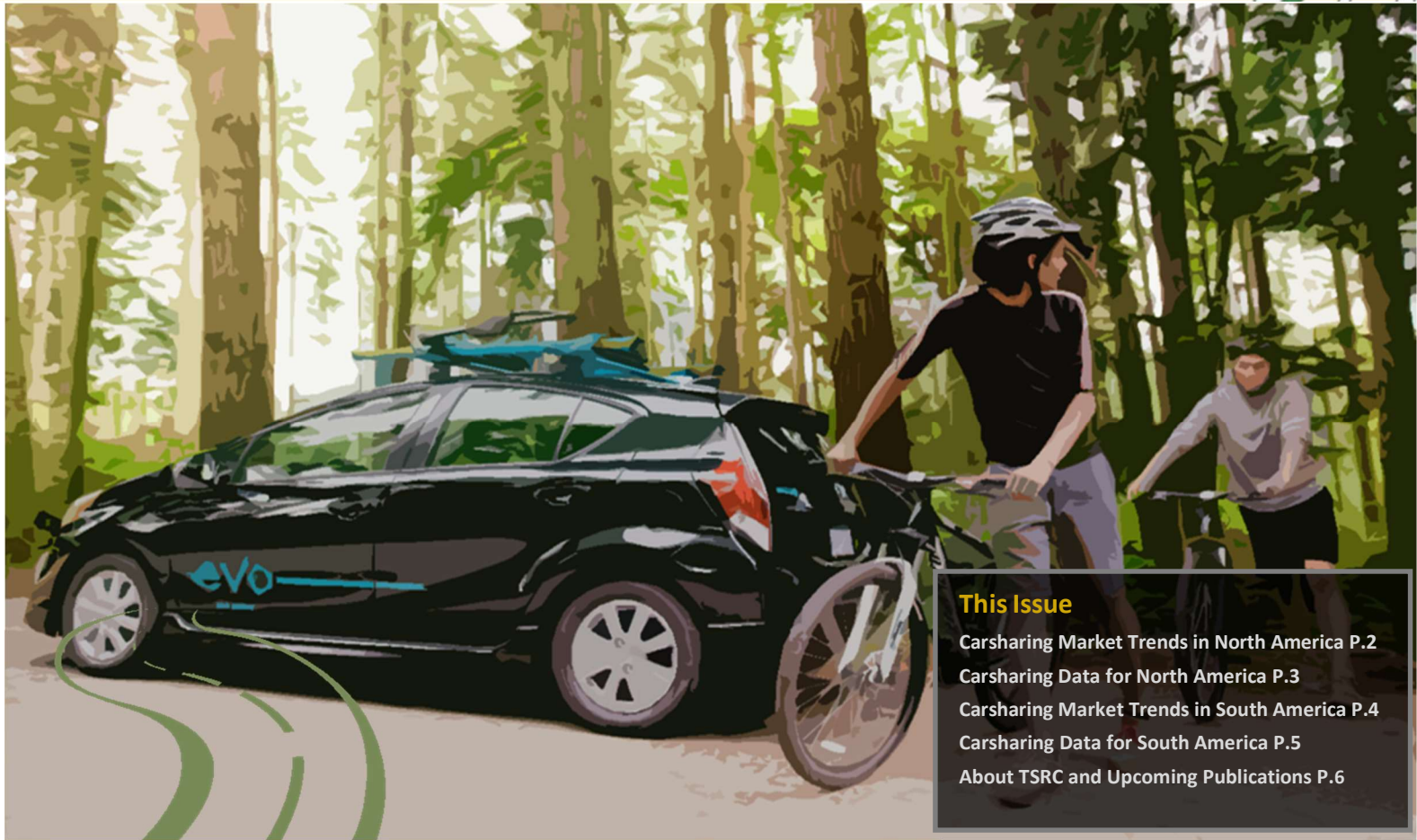
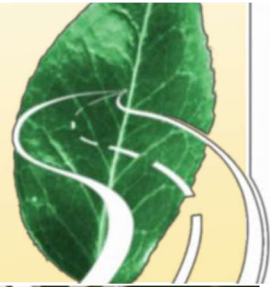
# INNOVATIVE MOBILITY: CARSHARING OUTLOOK

CARSHARING MARKET OVERVIEW, ANALYSIS, AND TRENDS ▪ Winter 2020

TRANSPORTATION SUSTAINABILITY RESEARCH CENTER - UNIVERSITY OF CALIFORNIA, BERKELEY

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## Carsharing Market Trends in North America

Since 1998, 94 carsharing programs have been deployed in North America - 40 are operational and 52 are defunct. As of January 1, 2018, there were 18 active programs in Canada, 21 in the United States (U.S.), and one program in Mexico. In North America, carsharing membership totaled approximately 2,110,111 members sharing 23,376 vehicles. The three largest carsharing operators in the U.S. and Canada accounted for 91% and 86% of the total membership, respectively. Only one operator provided service in Mexico as of January 2018.

**Membership:** As of January 1, 2018, 18 Canadian operators claimed 642,472 members and shared 8,052 vehicles. In the U.S., 1,439,399 members shared 15,224 vehicles among 21 operators. Mexico had 28,240 members sharing 100 vehicles. (Note: Multi-national programs with operations in both the U.S. and Canada are counted as an individual operator in each country.)

## Save the Date!



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

### Carsharing Association Conference

Please mark your calendars for **May 28 to May 29, 2020** for the Carsharing Conference to be held in Vancouver, Canada. For more information please visit:

<http://conference.carsharing.org/>

Courtesy: Communauto



## CARSHARING MARKET TRENDS IN NORTH AMERICA (continued)

**Year-Over-Year Change in Membership and Fleets:** Between January 2017 and January 2018, carsharing membership increased 2.4% in the U.S. and grew 25.6% in Canada. In Mexico, membership increased by 179%. Additionally, between January 2017 and January 2018, carsharing fleets decreased 11.4% in the U.S., grew 8.6% in Canada, and increased 156% in Mexico during this same timeframe.

**Member-Vehicle Ratios:** Member-vehicle ratios are an important metric that can be used to assess how many customers are being served per vehicle and the relative level of usage by carsharing members. As of January 2018, U.S. member-vehicle ratios were 95:1, representing a 15.5% increase over the previous year. In Canada, the ratio was 80:1, which was a 15.7% increase over the previous year. In Mexico, the ratio was 282:1, representing an 8.7% increase over the same period. During this time, average member-vehicle ratios in North America increased to 90:1, representing a 15.4% increase from January 2017.

**Business Models:** In January 2018, U.S. for-profit programs (13 of 21) represented 61.9% of the operators and accounted for 99.6% of the members and 98.9% of vehicles. In Canada, for-profit programs (12 of 18) represented 66.7% of the operators and accounted for 97.9% of the membership and 91.2% of the fleets deployed. Mexico for-profit programs (1 of 1) represented 100% of operators and 100% of members and vehicles. Across North America, for-profit programs claimed 99.1% of members and 96.3% of shared fleets.

*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

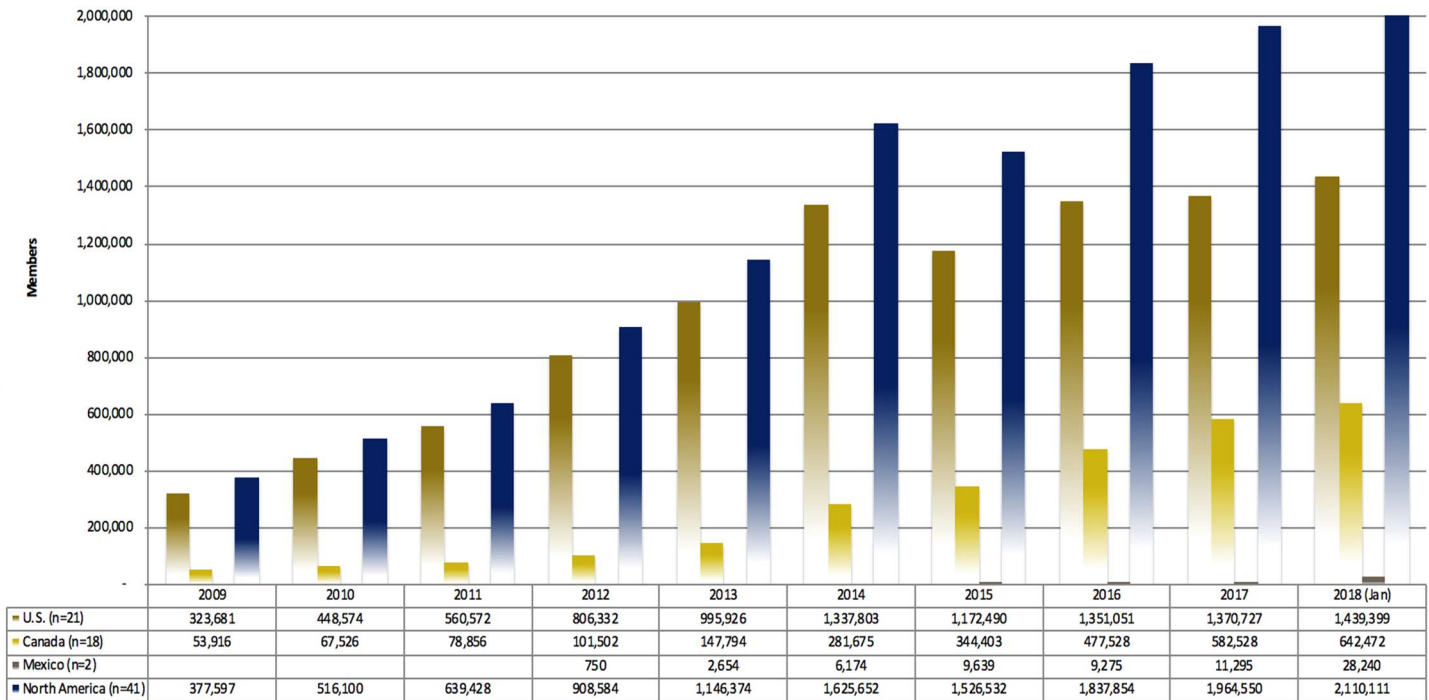
**Automakers:** In North America, four automaker programs collectively represented 46.7% and 34.1% of the carsharing membership and fleets deployed, respectively in January 2018. As of January 2018, Maven (General Motors), car2go (Daimler), BlueIndy (Bolloré), and ReachNow (BMW) operated in 12 markets in the U.S. Two operators, including Maven (pilot program) and car2go, provided carsharing services in four Canadian cities as of January 2018. In November 2019, Hyundai launched Mocean Carshare using electric vehicles in Los Angeles.

**One Way:** 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 2018, 36.3% of North American fleets were one-way trip capable, and 49.5% of members had access to these fleets. As of January 2018, car2go, Communauto (select markets), BlueIndy, Evo Car Share, Maven (select markets), ReachNow (select markets), Gig Car Share, POGO Carshare, and WaiveCar offered one-way services in North America. As of January 2018, these one-way operations provided carsharing services in 12 U.S. markets (Ann Arbor, Austin, Columbus, Denver, Detroit, Indianapolis, Los Angeles, New York City, Portland, San Francisco, Seattle, and Washington DC) and seven Canadian markets (Waterloo, Quebec City, Calgary, Edmonton, Toronto, Vancouver, and Montréal). Please note: In February 2019, car2go and ReachNow announced a merger and rebranded as ShareNow. In February 2020 ShareNow discontinued services in North America (Montreal, New York, Seattle, Washington DC, and Vancouver). ShareNow will continue in some European cities. BlueIndy has announced that it will discontinue its service in Indianapolis in May 2020.

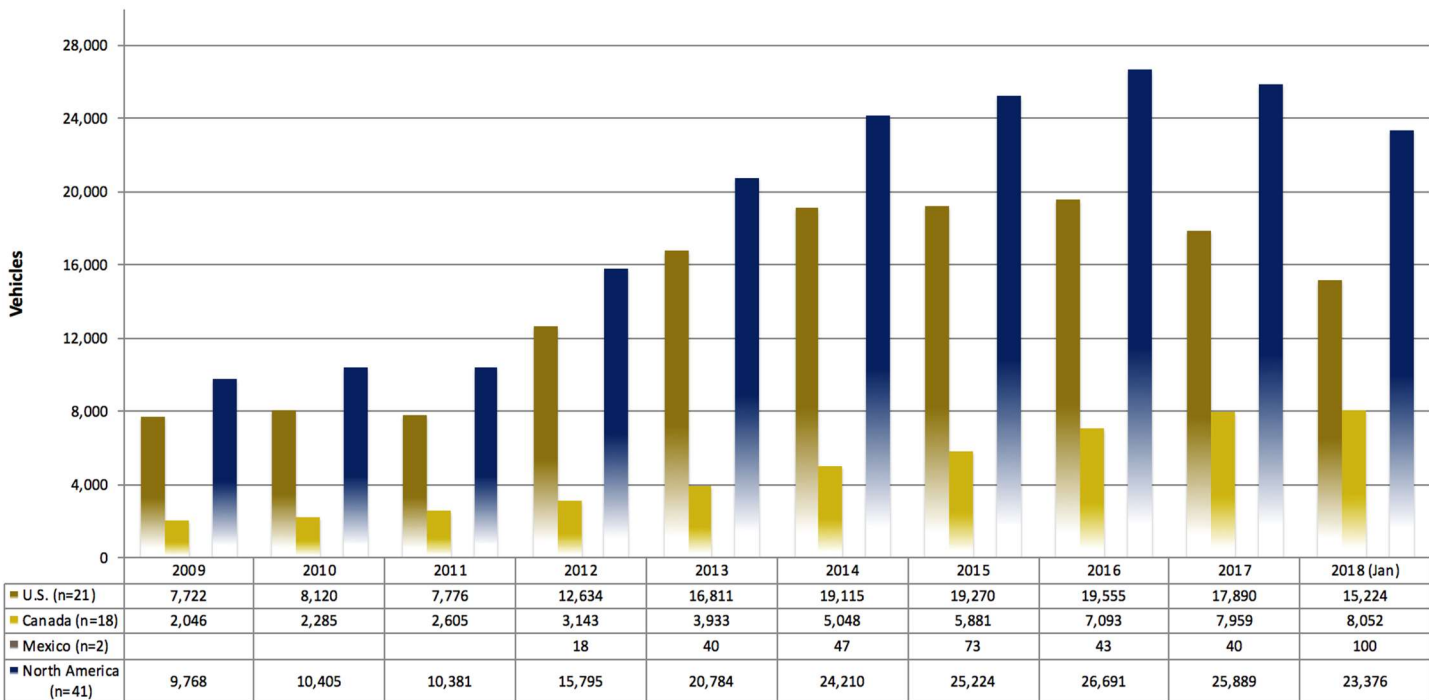
**Rental Cars:** In North America, three rental car programs (Avis Budget Group's Zipcar brand, Enterprise Holdings, and UHaul) represented 42.9% and 44.9% of the carsharing membership and fleets deployed, respectively, as of January 2018. In October 2019, Penske launched Penske Dash in the Washington D.C. metropolitan area.

# CARSHARING MARKET TRENDS IN NORTH AMERICA

## Member Growth in North America\*



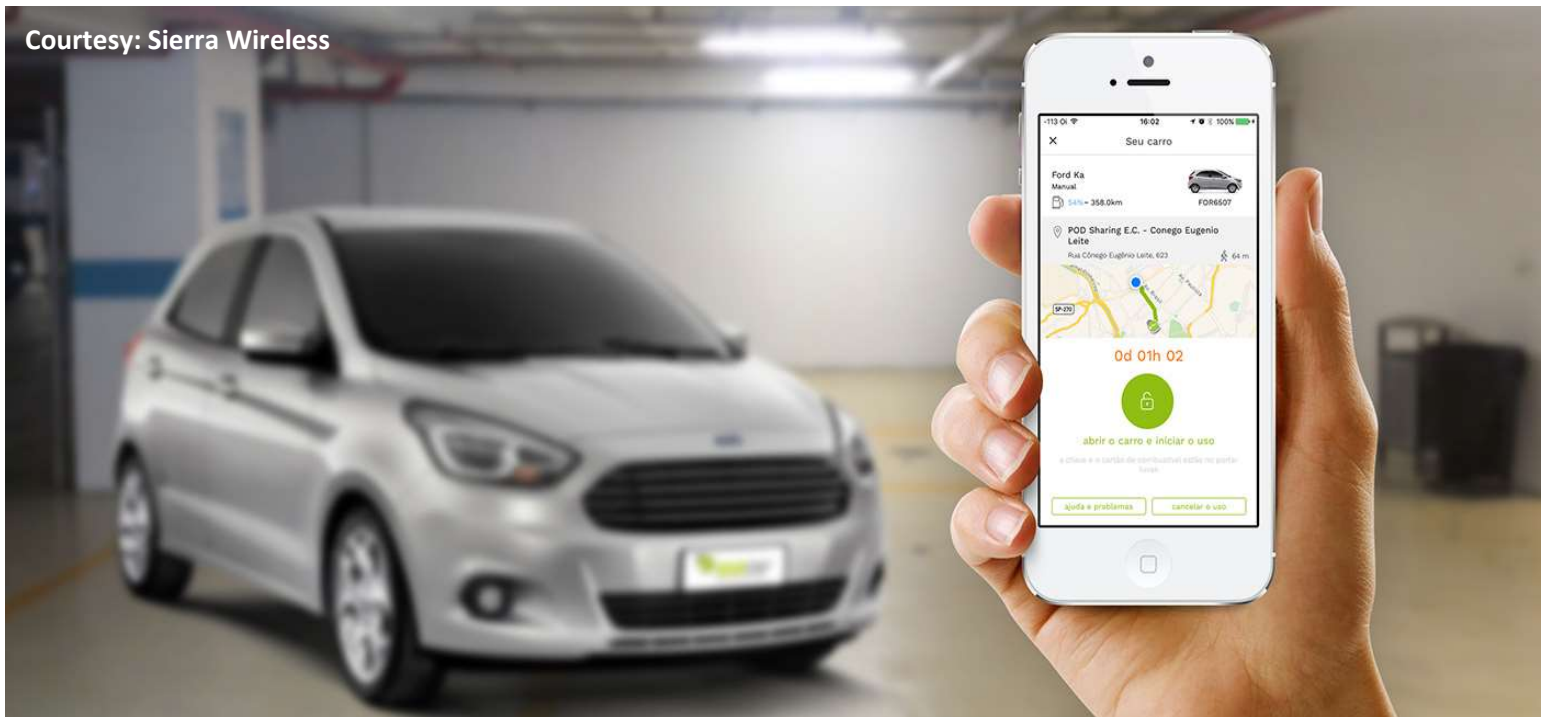
## Vehicle Growth in North America\*



\* Data depict July of each year, unless otherwise noted. "n" reflects the number of operators as of January 2018. Numbers include roundtrip and one-way carsharing. Numbers do not include peer-to-peer carsharing.



Courtesy: Sierra Wireless



## CARSHARING MARKET TRENDS IN SOUTH AMERICA

Since 2010, eight carsharing programs have been deployed in South America. Seven carsharing programs are operational, and one is defunct. As of January 1, 2018, there were five active programs in Brazil, one operation in Chile, and one in Columbia. In Brazil, 12,926 members shared 237 vehicles. In Chile, 3,300 members shared 105 carsharing vehicles. In Columbia, there are 666 members sharing 21 vehicles. In total, 16,892 members shared 363 vehicles in South America as of January 2018.

**Year-Over-Year Change in Membership and Fleets:** Between January 2017 and January 2018, carsharing membership increased 41.9% in South America. Additionally, between January 2017 and January 2018, carsharing fleets increased 150.3% in South America. This was largely due to an expansion of carsharing programs in select South American markets.

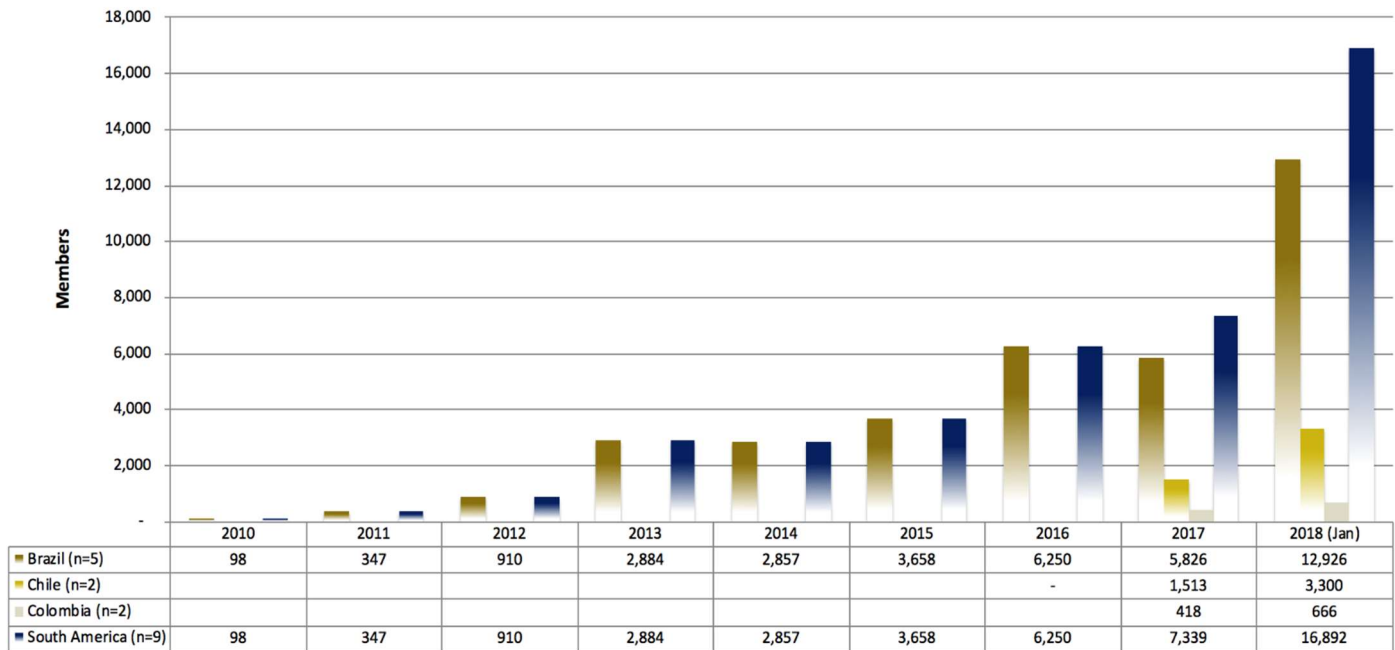
**Member-Vehicle Ratios:** Member-vehicle ratios are an important metric that can be used to assess how many customers are being served per vehicle and the relative usage level of carsharing members. As of January 2018, Brazil member-vehicle ratios were 55:1, representing a 53.2% decrease over the previous year. In Chile, the ratio was 31:1, representing a 42.7% increase over the previous period. In Columbia, the ratio was 32:1. Carsharing services were not operational in Colombia during the previous period. Average member-vehicle ratios in South America decreased to 47:1, representing a 56.7% decrease from January 2017 due to an increasing number of new operators coupled with notable fleet growth.

**Business Models:** As of January 2018, for-profit programs (7 of 7) represented 100% of the operators and accounted for 100% of the members and 100% of vehicles in South America. As of January 2018, no rental car providers offered carsharing services in South America, and only Urbano Carsharing offered one-way services in Sao Paulo, Brazil.

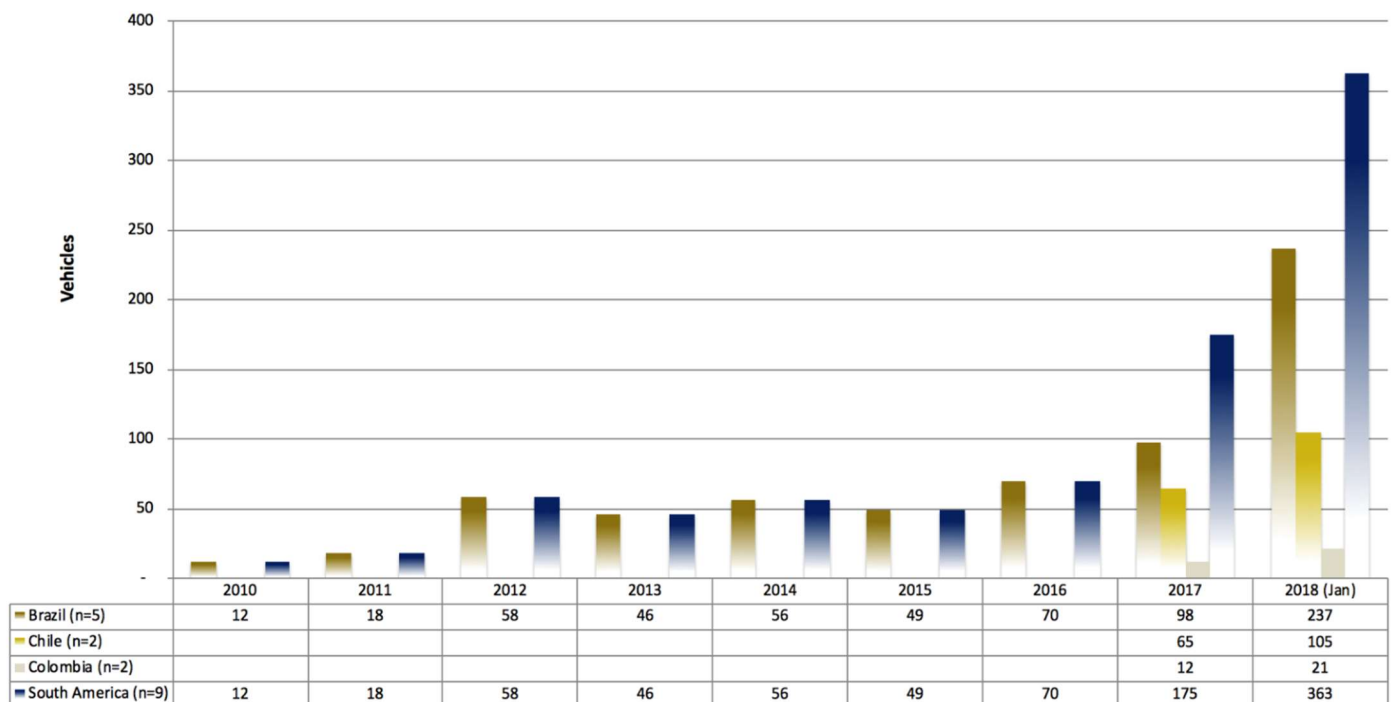
*Note: Numbers include roundtrip and one-way carsharing and do not include peer-to-peer carsharing.*

# CARSHARING MARKET TRENDS IN SOUTH AMERICA

## Member Growth in South America\*



## Vehicle Growth in South America\*



\*Data depict July of each year. "n" reflects the number of operators as of January 2018. Numbers include roundtrip and one-way carsharing. Numbers do not include peer-to-peer carsharing.





## 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. 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.

### Recent Publications

Shaheen, Susan, Adam Cohen, Michael Randolph, Emily Farrar, Richard Davis, and Aqshems Nichols (2019). *Shared Mobility Policy Playbook*. Berkeley, CA. December, 224 pages. <https://escholarship.org/content/qt9678b4xs/qt9678b4xs.pdf?t=q3qu5m&v=lg>

Shaheen, Susan and Mohamed Amine Bouzaghrane (2019). "Mobility and Energy Impacts of Shared Automated Vehicles: A Review of Recent Literature," *Current Sustainable/Renewable Energy Reports*. 7 pages. <https://escholarship.org/uc/item/5g29c7pp>

Shaheen, Susan, Elliot Martin, and Mikaela Hoffman-Stapleton (2019). "Shared Mobility and Urban Form Impacts: A Case Study of Peer-to-Peer (P2P) Carsharing in the U.S.," *Journal Urbanism Design*. 17 pages. <https://escholarship.org/uc/item/34z556p2>

Shaheen, Susan, Adam Cohen, and Emily Farrar (2019). *Chapter Five: Carsharing's Impact and Future*. *Advances in Transport Policy and Planning, Volume 4*. ISSN 2543-0009. pp. 87-119. <http://escholarship.org/uc/item/2f5896tp>

Shaheen, Susan, Elliot Martin, and Hannah Totte (2019). "Impacts of Zero-Emission Vehicle Exposure Within U.S. Carsharing Fleets and Impacts on Sentiment Toward Electric-Drive Vehicles," *Transport Policy*. 10 pages. <https://escholarship.org/uc/item/95j7g71k>

Shaheen, Susan, Adam Cohen, Mark Dowd, and Richard Davis (2019). *A Framework for Integrating Transportation into Smart Cities*. MTI-19-29. San Jose, CA. October, 102 pages. <https://transweb.sjsu.edu/sites/default/files/1705-Shaheen-Framework-Transportation-Smart-Cities.pdf>

Shaheen, Susan and Adam Cohen (2018). *Shared Ride Services in North America: Definitions, Impacts, and the Future of Pooling*. *Transport Reviews*. pp. 1-17. <https://escholarship.org/uc/item/46p6n2sk>

### TSRC Methodology

Data include one-way carsharing unless otherwise stated. Data exclude peer-to-peer carsharing numbers. 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 and 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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### INNOVATIVE MOBILITY CARSHARING OUTLOOK

Winter 2020

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