Title
Innovative Mobility: Carsharing Outlook Carsharing Market Overview, Analysis, And Trends.

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This Issue
- Carsharing Market Trends in North America P.2
- Carsharing Data for North America P.3
- Carsharing Market Trends in South America P.4
- Carsharing Data for South America P.5
- About TSRC and Upcoming Publications P.6

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/

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.)
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), Bluelyndy (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.

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

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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.
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.
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***

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*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.

**Vehicle Growth in South America***

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*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.
Recent Publications


TCSR 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 TCSR 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 TCSR, UC Berkeley. For more detailed market analyses (e.g., longitudinal growth numbers in the Americas), please see: http://imr.berkeley.edu.

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