The Carsharing Telematics Market

The Carsharing Telematics Market is a comprehensive report from Berg Insight analysing the latest developments on this market worldwide.

This strategic research report from Berg Insight provides you with 100 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from this report:

- **Insights** from numerous executive interviews with market leading companies.

- **New data** on carsharing fleets and members worldwide.

- **Comprehensive** overview of the carsharing telematics value chain.

- **In-depth analysis** of market trends and key developments.

- **Detailed profiles** of 19 carsharing platform vendors and their propositions.

- **Market forecasts** by region lasting until 2020.

The Carsharing Telematics Market
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Carsharing membership will reach 26 million worldwide in 2020

Passenger cars and light trucks are the main modes of transportation in most industrialised countries. The vast majority of car trips in metropolitan areas are drive-alone trips with only one person in the car and vehicles are used for only about one hour per day on average. Carsharing is one of many car-based mobility services that have become available for people that want to complement other modes of transportation with car-based mobility occasionally. Examples of other car-based mobility services include traditional car rental, carpooling, ridesharing, taxi and ridesourcing services. Many of these mobility services aim to decrease the cost of car-based transportation, create convenience through fewer ownership responsibilities, as well as reduce congestion and environmental impact.

Carsharing is a decentralised car rental service focusing on short term rentals that supplements other modes of transports including walking, cycling and public transport. Carsharing aims to provide an alternative to individual car ownership without restricting individual mobility by providing affordable access to cars. Moreover, carsharing aims to both reduce distance travelled by car and the number of cars in use. Carsharing services thus create environmental, economic and social benefits. Carsharing is a membership-based service available to all qualified drivers in a community. Car Sharing Organisations (CSOs) offer members access to a fleet of shared cars from unattended self-service locations. Usage is billed by the minute/hour and by distance driven, with rates that include fuel, insurance and maintenance. Today, most CSOs use station-based networks with roundtrip rental. This operational model requires members to return a vehicle to the same designated station from which it was accessed. Some CSOs have also started to offer one-way carsharing that enables users to return the car to any station operated by the CSO. Another model that is rapidly gaining in popularity is free floating carsharing, which enables members to pick up and drop off cars anywhere within a designated area. The ability to access available cars instantly without prior booking and no need to schedule return time make this type of service attractive for short trips.

New technologies in the form of telematics systems and smartphones are key enablers of car-based mobility services. In-car hardware technologies for carsharing services comprise an on-board computer, telematics device and RFID reader for capturing trip data, enable fleet management and grant access to the car through an RFID smartcard or smartphone app. An in-vehicle user terminal with keypad and display ▸
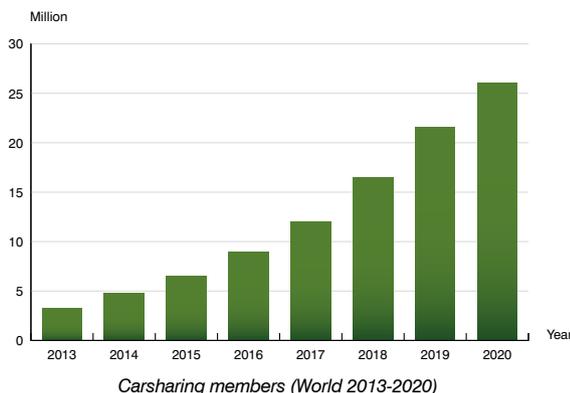
▸ may also be installed to provide the driver with visible messages and guidance, as well as allow management of reservations from within the vehicle. Software platforms for carsharing have evolved from basic booking systems to complete IT systems that can support all the operational activities of a CSO ranging from management of in-vehicle equipment, fleet management, booking management, billing, as well as operations supervision via dashboards and data analytics. Examples of leading vendors of hardware and software platforms include Convadis, Good Travel Software, IER Group, INVERS, Miveo, Mobiag, OpenFleet and Vulog.

There are now roughly 300 CSOs active in about 30 countries and close to 1,000 cities, primarily in Europe, North America and developed markets in Asia-Pacific. Commercial carsharing services are offered by specialist carsharing companies (in the form of cooperatives, non-profit organisations as well as for profit companies), car rental companies, carmakers, as well as public transport operators. Examples of leading CSOs active in multiple countries include Car2go (owned by Daimler), DriveNow (owned by BMW and Sixt), Bluecarsharing (owned by the French Bolloré Group), as well as Zipcar (owned by Avis Budget Group). However, the majority of CSOs are mainly active in a single country or a few cities. Examples include Times Car Plus (owned by the Japanese parking lot operator Time 24), Socar in South Korea, Enjoy (owned by the Italian energy company Eni), Mobility Carsharing in Switzerland, Communauto in Canada and GoGet in Australia.

Carsharing membership has grown from 4.8 million worldwide at the end of 2014 to an estimated 6.5 million at the end of 2015. At the same time, the total car fleet operated by CSOs has increased from 100,000 vehicles to about 123,000 vehicles. Free floating services are now available in 12 countries and 43 cities in Europe and North America, with a combined fleet of about 20,000 cars and 2.0 million members at the end of 2015. Berg Insight forecasts that carsharing membership will grow to 26.0 million worldwide by the end of 2020 and the total carsharing fleet will then reach 450,000 cars.

Carsharing members (World 2013-2020)

This report answers the following questions:

- What is the current status of the carsharing telematics industry?
- Which are the leading carsharing telematics platform providers?
- How are carmakers positioning themselves on the carsharing market?
- What carsharing services are available from leading service providers today?
- What business models are used by carsharing companies?
- How can smartphones be leveraged for carsharing services?
- How will the market evolve in Europe, North America and other parts of the world?

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About the Author

André Malm is a Senior Analyst with a Master's degree from Chalmers University of Technology. He joined Berg Insight in 2006 and his areas of expertise include car telematics, location-based services, M2M/IoT and handset technologies.

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