The Carsharing Telematics Market

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

This strategic research report from Berg Insight provides you with 140 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 30 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 23 carsharing platform vendors and their propositions.
- **Case studies** of 50 carsharing initiatives from specialist CSOs and car OEMs.
- **Market forecasts** by region lasting until 2022.

Berg Insight’s M2M Research Series

What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight's M2M Research Series is a unique series of 35 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or vehicle telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets, respectively.

www.berginsight.com

Order now!

Please visit our web site to order this report and find more information about our other titles at www.berginsight.com
Carsharing membership reached 23.8 million worldwide in 2017

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. CarSharing Organisations (CSOs) offer members access to a fleet of shared cars from unattended self-service locations. 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 carsharing 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 include 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. Leading vendors of hardware and software platforms include INVERS, Convadis, Omoove, Good Travel Software, Vulog, Ridecell, Targa Telematics and OpenFleet. Several carsharing technology vendors also target the emerging corporate carsharing market that aims to increase corporate car pool availability and reduce mobility costs.

Commercial carsharing services are offered by specialist carsharing companies, car rental companies, carmakers, as well as public transport operators. Examples of leading CSOs backed by carmakers include Car2go (owned by Daimler), DriveNow (owned by BMW) and Maven (owned by GM). Car rental CSOs include Ubeeqo (owned by Europcar) as well as Zipcar (owned by Avis Budget Group). Examples of specialised CSOs include Times Car Plus (owned by the Japanese parking lot operator Park 24), Socar in South Korea, Pand Auto and EvCard in China, Enjoy (owned by the Italian energy company Eni), Mobility Carsharing in Switzerland, Stadtmobil and Flinkster in Germany, Communauto in Canada and GoGet in Australia.

The nascent carsharing market is currently in a phase of strong growth which is expected to continue in the coming years. Berg Insight estimates that the total number of carsharing members worldwide reached 23.8 million at the end of 2017. At the same time, the total car fleet operated by CSOs had reached about 214,000 vehicles. Berg Insight forecasts that carsharing membership will grow to about 60.8 million globally by the end of 2022 and the total carsharing fleet will then reach approximately 705,000 cars. The corporate carsharing telematics market is moreover estimated to 35,000 vehicles at year-end 2017 and is forecasted to reach about 136,000 vehicles in 2022. Europe, North America and Asia-Pacific so far represent the vast majority of all carsharing programmes and active policies from an international perspective. The front-running markets include Germany, Italy, USA, South Korea, China and Japan. In 2017, the Asian market experienced rapid growth of carsharing members and the region now accounts for more than 60 percent of the global member base.

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?
- How will the corporate carsharing market evolve in the upcoming years?
Executive Summary

1 Cars and personal mobility services
1.1 Introduction
1.1.1 Passenger cars in use by region
1.1.2 New passenger car registration trends
1.2 Market trends
1.2.1 Peak car use and car ownership
1.2.2 The sharing economy
1.3 Car-based mobility services
1.3.1 Overview of carsharing services
1.3.2 Carsharing operational models
1.4 Carsharing services worldwide
1.4.1 Carsharing in Europe
1.4.2 Carsharing in the Americas
1.4.3 Carsharing in Asia-Pacific
1.4.4 Overview of carsharing service providers
1.5 Car telematics infrastructure
1.5.1 Vehicle segment
1.5.2 Tracking segment
1.5.3 Network segment
1.5.4 Service segment
2 Car OEM mobility service initiatives
2.1 BMW
2.1.1 Overview of BMW group passenger car models
2.1.2 DriveNow
2.1.3 ReachNow
2.1.4 AlphaCity corporate carsharing
2.2 Daimler Group
2.2.1 Overview of Mercedes-Benz and Smart passenger car models
2.2.2 Moovel
2.2.3 Car2go
2.3 Ford Motor Company
2.3.1 Overview of Ford passenger car models
2.3.2 New mobility projects and services from Ford
2.4 General Motors
2.4.1 Overview of the main GM passenger car brands
2.4.2 GM urban mobility programmes
2.4.3 Maven
2.5 Hyundai Motor Group
2.5.1 Overview of Hyundai and Kia passenger car models
2.5.2 Hyundai IONIQ Carsharing and mobility programmes
2.5.3 Kia Motors and WiBLE mobility initiatives
2.6 Nissan Motor Company
2.6.1 Overview of Nissan and Infiniti passenger car models
2.6.2 Nissan carsharing services
2.7 PSA Group
2.7.1 Overview of PSA Group passenger car brands and models
2.7.2 PSA mobility services
2.7.3 Free2Move
2.8 Renault Group
2.8.1 Overview of Renault and Dacia passenger car models
2.8.2 Renault Group’s carsharing initiatives
2.9 Toyota Motor Corporation
2.9.1 Overview of Toyota and Lexus passenger car models
2.9.2 Toyota mobility services platform
2.10 Volkswagen Group
2.10.1 Overview of Volkswagen Group passenger car brands and models
2.10.2 New mobility concepts from the Volkswagen Group
2.10.3 The VRent corporate carsharing service in China
2.10.4 škoda carsharing programme
2.10.5 Audi mobility service programmes
2.11 Volvo Car Group
2.11.1 Overview of Volvo passenger car models
2.11.2 Volvo Cars Mobility and Sunfleet
3 Carsharing organisations
3.1 Specialist carsharing companies in Europe
3.1.1 Bluecarsharing (Bolloré Group)
3.1.2 Blumove
3.1.3 Cambio
3.1.4 Citiz
3.1.5 Co-Wheels
3.1.6 Emov
3.1.7 Enjoy
3.1.8 Flinkster
3.1.9 GoCar
3.1.10 GreenMobility (Your City Car)
3.1.11 Greenwheels
3.1.12 Mobility Carsharing Switzerland
3.1.13 Respiro
3.1.14 Stadtmbil
3.1.15 Zity
3.2 Specialist carsharing companies in the Americas
3.2.1 AutoShare
3.2.2 Car2Go
3.2.3 City CarShare
3.2.4 Communauto
3.2.5 GIG CarShare
3.2.6 Zazzcar
3.3 Specialist carsharing companies in Asia-Pacific
3.3.1 EvCard
3.3.2 GoGet
3.3.3 GreenShareCar
3.3.4 Pand Auto
3.3.5 Socar
3.3.6 Zoomcar
3.4 Specialist carsharing companies in ROW
3.4.1 Anytime
3.4.2 Delimobil
3.4.3 CAR2GO
3.4.4 Carmine
3.5 Car rental companies
3.5.1 Avis Budget Group and Zipcar
3.5.2 Enterprise Rent-A-Car and Enterprise CarShare
3.5.3 Europcar and Ubeeqo
3.5.4 Hertz
3.5.5 Lotte Rental and Green Car
3.5.6 ORIX Auto Corporation and ORIX CarShare
3.5.7 Sixt Group
3.5.8 U-Haul

4 Technology vendors
4.1 End-to-end carsharing solutions
4.1.1 FastFleet and Local Motion by Zipcar
4.1.2 GoTo
4.1.3 IER-Polyconseil (Bolloré Group)
4.1.4 JSI Mobility
4.1.5 Miveo (Move About Group)
4.1.6 Moblag
4.1.7 MonGeo Connected Technology
4.1.8 Omnove (Octo Telematics)
4.1.9 OpenFleet
4.1.10 TomTom Telematics
4.1.11 Vulog
4.2 Carsharing software platforms
4.2.1 Cantamen
4.2.2 Fleetster (Next Generation Mobility)
4.2.3 Good Travel Software
4.2.4 Mobility Systems + Services
4.2.5 RCI Mobility
4.2.6 Ridecell
4.2.7 Targa Telematics
4.2.8 Zemtu
4.3 In-vehicle systems
4.3.1 Astus (ETL Electronics)
4.3.2 Convadis
4.3.3 INVERS
4.3.4 OTA Keys (Continental)

5 Market forecasts and trends
5.1 Carsharing market forecasts
5.1.1 Carsharing in the EU28+EFTA
5.1.2 Carsharing in North America
5.1.3 Carsharing in Asia-Pacific
5.1.4 Carsharing in ROW
5.1.5 Connected carsharing platform forecast
5.1.6 Corporate carsharing forecast
5.2 Mergers and acquisitions in the carsharing telematics space
5.3 Market trends
5.3.1 Carsharing is becoming increasingly integrated with other mobility services
5.3.2 Carsharing and public transport ecosystems to converge
5.3.3 Electric cars are a natural fit for carsharing
5.3.4 Free floating carsharing services on the rise
5.3.5 Hybrid station-based and free floating models show promise
5.3.6 Autonomous cars are expected to change the playing field for carsharing
5.3.7 Carsharing becomes a popular means to reduce corporate mobility costs

Glossary
About the Author

Martin Svegander is an M2M/IoT Analyst with a Master’s degree in Industrial Engineering and Management from Linköping University. He joined Berg Insight in 2017 and his areas of expertise include vehicle telematics, insurance telematics and shared mobility services.

Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.

Who should buy this report?

**The Carsharing Telematics Market** is the foremost source of information about the rapid adoption of carsharing technology. Whether you are a car manufacturer, telematics service provider, telecom operator, content provider, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

<table>
<thead>
<tr>
<th>Related products</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Insurance Telematics in Europe and North America</td>
</tr>
<tr>
<td>• The Global Automotive OEM Telematics Market</td>
</tr>
<tr>
<td>• Fleet Management in Europe</td>
</tr>
<tr>
<td>• The Future of Autonomous Cars</td>
</tr>
</tbody>
</table>

Order form — TO RECEIVE YOUR COPY OF THE CARSHARING TELEMATICS MARKET

You can place your order in the following alternative ways:
1. Place your order online in our web shop at www.berginsight.com
2. Mail this order sheet to us at: Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden
3. Email your order to: info@berginsight.com
4. Phone us at +46 31 711 30 91

- **Family/Surname**
- **Forename**
- **Position**
- **Company**
- **Address**
- **Telephone**
- **Country**
- **Postcode**
- **Email**

VAT is chargeable on all orders from Sweden. Orders from all other countries in the European Union must include the buyer’s VAT Registration number below in order to avoid the addition of VAT.

Your PO number: ____________________________
Your VAT/TVA/IVA/BTW/MWST number: ____________________________

Please charge my credit card

- [ ] VISA
- [ ] Mastercard

Card number: ____________________________
Expiry date (MM/YY): ____________________________
CV code: ____________________________

Cardholder’s name: ____________________________
Signature: ____________________________

Billing address: ____________________________

Postcode: ____________________________
Country: ____________________________

- [ ] We enclose our cheque payable to Berg Insight AB
- [ ] Please invoice me

Signature: ____________________________
Date: ____________________________

Reports will be dispatched once full payment has been received. For any enquiries regarding this, please contact us. Payment may be made by credit card, cheque made payable to Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden or by direct bank transfer to Skandinaviska Enskilda Banken, 106 40 Stockholm, Sweden. Please quote your PO number 5011 10 402 80 BIC/SWIFT: ESSESESS

Account Holder: Berg Insight AB
Account number: 5011 10 402 80
IBAN: SE92 5000 0000 0501 1104 0280

The Carsharing Telematics Market is the foremost source of information about the rapid adoption of carsharing technology. Whether you are a car manufacturer, telematics service provider, telecom operator, content provider, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

**Related products**

- Insurance Telematics in Europe and North America
- The Global Automotive OEM Telematics Market
- Fleet Management in Europe
- The Future of Autonomous Cars

**Order form** — TO RECEIVE YOUR COPY OF THE CARSHARING TELEMATICS MARKET

You can place your order in the following alternative ways:
1. Place your order online in our web shop at www.berginsight.com
2. Mail this order sheet to us at: Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden
3. Email your order to: info@berginsight.com
4. Phone us at +46 31 711 30 91

Family/Surname
Forename
Position
Company
Address
Telephone
Country
Postcode
Email

VAT is chargeable on all orders from Sweden. Orders from all other countries in the European Union must include the buyer’s VAT Registration number below in order to avoid the addition of VAT.

Your PO number: ____________________________
Your VAT/TVA/IVA/BTW/MWST number: ____________________________

Please charge my credit card

- [ ] VISA
- [ ] Mastercard

Card number: ____________________________
Expiry date (MM/YY): ____________________________
CV code: ____________________________

Cardholder’s name: ____________________________
Signature: ____________________________

Billing address: ____________________________

Postcode: ____________________________
Country: ____________________________

- [ ] We enclose our cheque payable to Berg Insight AB
- [ ] Please invoice me

Signature: ____________________________
Date: ____________________________

Reports will be dispatched once full payment has been received. For any enquiries regarding this, please contact us. Payment may be made by credit card, cheque made payable to Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden or by direct bank transfer to Skandinaviska Enskilda Banken, 106 40 Stockholm, Sweden. Please quote your PO number 5011 10 402 80 BIC/SWIFT: ESSESESS

Account Holder: Berg Insight AB
Account number: 5011 10 402 80
IBAN: SE92 5000 0000 0501 1104 0280