INVERS

White Paper

Car Sharing in North America

A full 2024 market overview for Canada, Mexico, and USA

invers.com

July 2024

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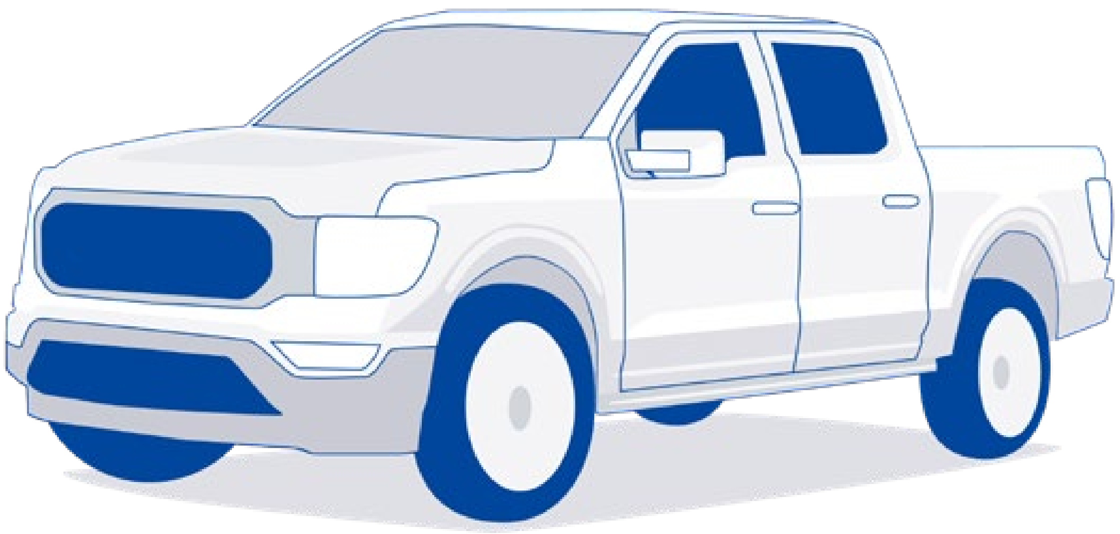

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Intro

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***Info:** P2P car sharing excluded for this KPI.

Aim and objectives

The mobility data jungle turned into easy-to-digest insights

The INVERS Mobility Barometer and White Papers are our newest publication formats. We aim to share market insights by publishing selected research results from related industries and learnings from market experts and practitioners.

The publications will be always free of charge and will cover different new mobility services. We are very excited to cover the North American car sharing market in this edition after looking at topics like European Station-Based Car Sharing, European Free-Floating Car Sharing, North American & European Large Vehicle Sharing, and Microcars.

The publication focuses on public information only and includes no “insider” knowledge from customers or other stakeholders.

Key elements of our white paper

Highlighting the North American car sharing market

Desktop study and operator analysis

We analyzed most car sharing services in North America by means of a desktop study, which included researching publicly available content and operators' websites.

Interviews

We interviewed **five car sharing experts** that run services in the US, Canada, and Mexico about their experience and key insights.

4 examples of car sharing business models

Business models are increasingly overlapping

Station-based / round-trip car sharing

In station-based car sharing, users must bring back the rented vehicle to one of the operator's locations or zones, usually the same one where they started their rental. This model includes community or condo car sharing. Often also called round-trip car sharing.

Operator examples:

- Modo (CAN)
- Zipcar (CAN, USA)

Free-floating car sharing

Short- to medium-term car rental service where customers rent vehicles on-demand and return them to any location within a designated geographical area.

Operator examples:

- Free2move (USA)
- Gig Car Share (USA)

Peer-2-peer car sharing (P2P)

In P2P car sharing, the vehicles are not owned by the operator, but by individuals or other companies. The P2P operator acts as an agent in between user and vehicle owner/provider.

Operator examples:

- Getaround (USA)
- Turo (USA)

Automated rental cases

The huge rental market is increasingly offering their assets in car sharing-like style. For instance, they offer automated pickup and drop-off. Some of these services are similar to station-based car sharing operations. This business model is not analyzed in this white paper.

Operator examples:

- Ufodrive (USA)
- Rabbit Rentals (USA)

Blurring the boundaries

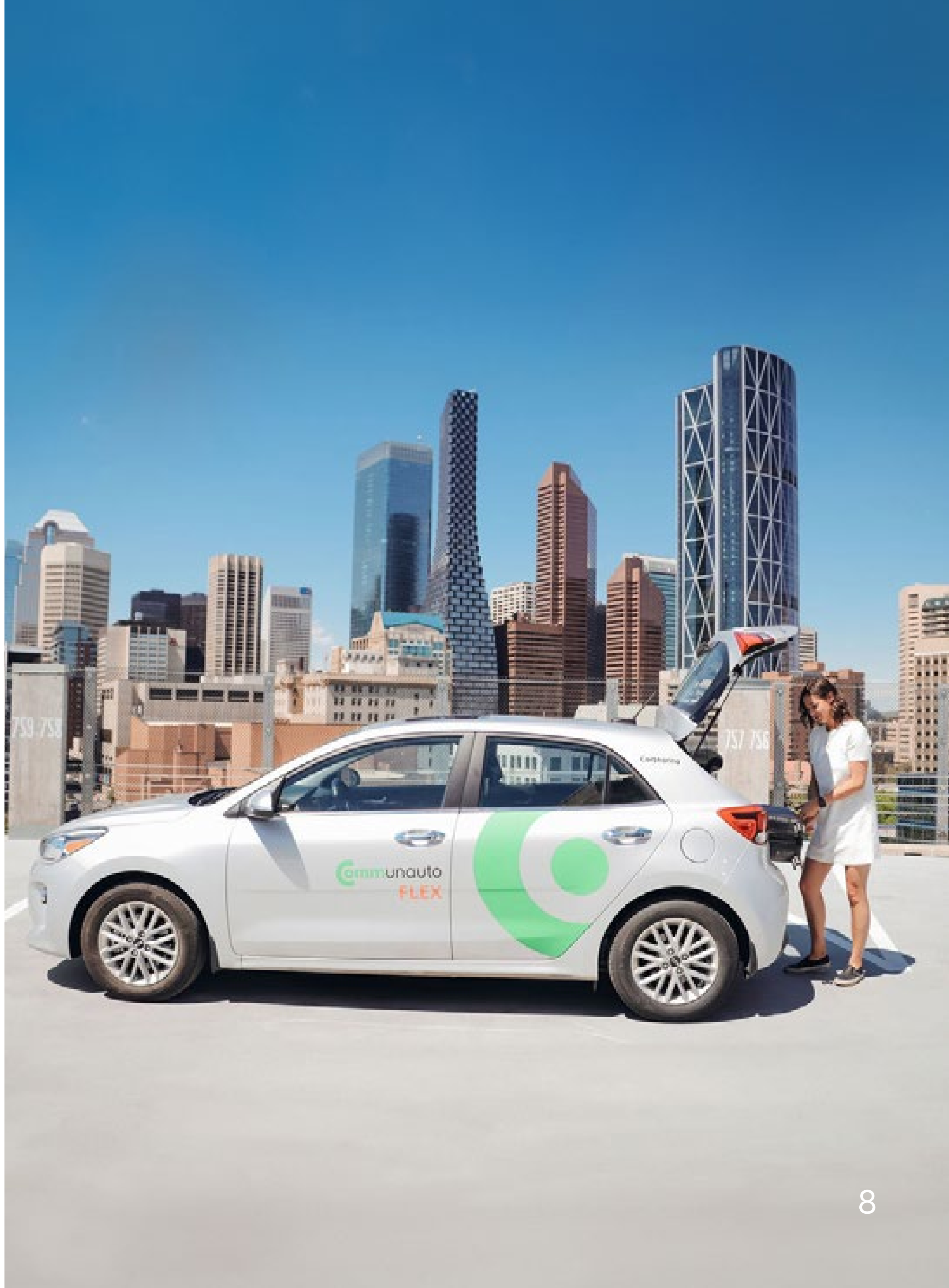
An increasing number of operators apply multiple business models

Traditionally separate car sharing models are increasingly growing together.

A blurring of the boundaries is evident among different models of car sharing: free-floating, station-based, peer-to-peer, and sometimes even car subscription and automated rental. An increasing number of operators are offering combinations of those models within their service offering.

Some examples:

- Communauto (station-based and free-floating)
- Uber (P2P and ride sharing)
- Green Commuter (ride sharing and station-based)
- Peg City Car Co-op (station-based and free-floating)



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Market Overview

Top-level market insights

Selected milestones of North American car sharing

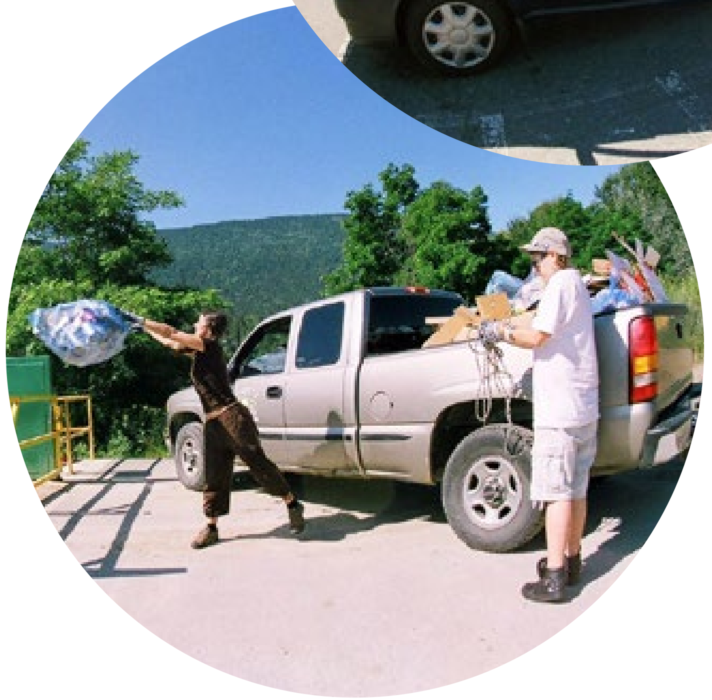
The first car sharing experiments started in the US in the 1980s, with initiatives like Purdue University's Mobility Enterprise and Short-Term Auto Rental (STAR) in San Francisco.

Auto-com (today Communauto) launched in Canada in 1994. CarSharing Portland was a pioneer in the space in the US in 1998. In Mexico, Carrot introduced a car sharing service in 2012.

Early growth and subsequent consolidation: Between 1998 and 2018, 94 car sharing programs were launched in North America. By 2018, 40 of these pioneers were still in operation (Shaheen & Cohen 2020).

Daimler's car sharing program Car2go grew free-floating car sharing from 2010 (pilot) onwards. The brand Car2go disappeared later, but free-floating is one of the core business models today.

Some fleet estimates and major operators are featured on the following pages. For a comprehensive overview of the early days of North American car sharing, refer to Shaheen, S. et al. (2006): „Carsharing in North America: Market Growth, Current Developments, and Future Potential."



A large market...

..that is difficult to quantify. Peer-to-peer (P2P) car sharing has the largest fleet size, while station-based and free-floating car sharing represent substantial market segments.

Estimating the fleet size of North American car sharing is challenging due to several factors. These include the wide variety of business models and operators, the blurred lines between car sharing and car rental, and the definition of peer-to-peer (P2P) car sharing fleets, among others. These complexities make it hard to find an exact number.

Shaheen & Cohen (2020) provided a comprehensive market estimate in 2020, reporting over 23,000 vehicles and 2.1 million registered users in the North American station-based and free-floating markets.

Berg Insight estimated at least 41,000 vehicles and 2.4 million members in station-based/round-trip, free-floating, and corporate car sharing in their December 2023 publication. Unlike Shaheen & Cohen (2020), Berg Insight includes corporate car sharing in their statistics. However, like Shaheen & Cohen (2020), they exclude the large P2P car sharing market.

In the North American P2P car sharing market, operators have a vast number of cars listed on their private car sharing platforms. For instance, Turo alone claims to have more than 350,000 vehicles listed globally (Turo 2024). P2P car sharing operators tend to communicate global fleet sizes, rather than regional or national fleet sizes. Therefore, P2P operators like Turo, Getaround, and Uber Carshare combined have a bigger fleet than station-based and free-floating services. However, the average number of trips per car is significantly higher for station-based and free-floating services.

Millions of people use car sharing in North America

In station-based and free-floating car sharing

2.4 million members

Berg Insight market estimate for North America (USA, Canada, and Mexico) as of end of 2022. Station-based, free-floating, and corporate car sharing markets only. P2P not involved.

Our featured national markets

Car sharing between the Statue of Liberty, CN Tower and the Palacio de Bellas Artes

USA

The US market is the biggest market in North America when looking at the national fleet sizes. There are several car sharing operators that run huge fleets of >1,000 vehicles as well as small local car sharing cooperatives. Especially the P2P platforms claim a very large amount of available vehicles.

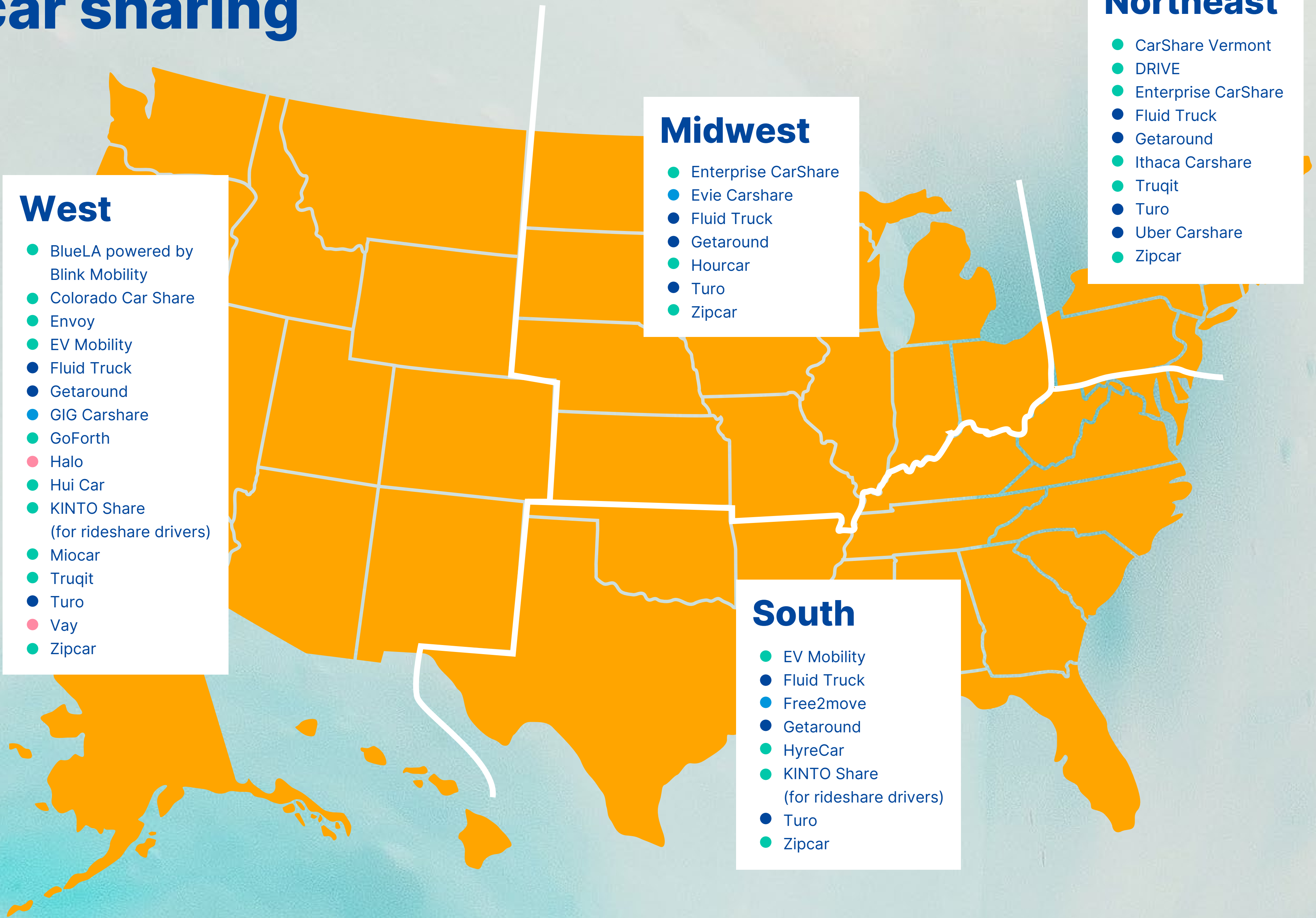
Canada

The Canadian market follows the US considering fleet size and offers multiple car sharing services with fleets over 1,000 vehicles. The list of non-profit services and cooperatives is also remarkable. With Turo and Uber Carshare in the market, the P2P market is also well-developed.

Mexico

Mexico is the smallest car sharing market in North America. The total fleet size of its few operators is estimated to be less than 1,000 vehicles.

Selected regional car sharing operators in USA

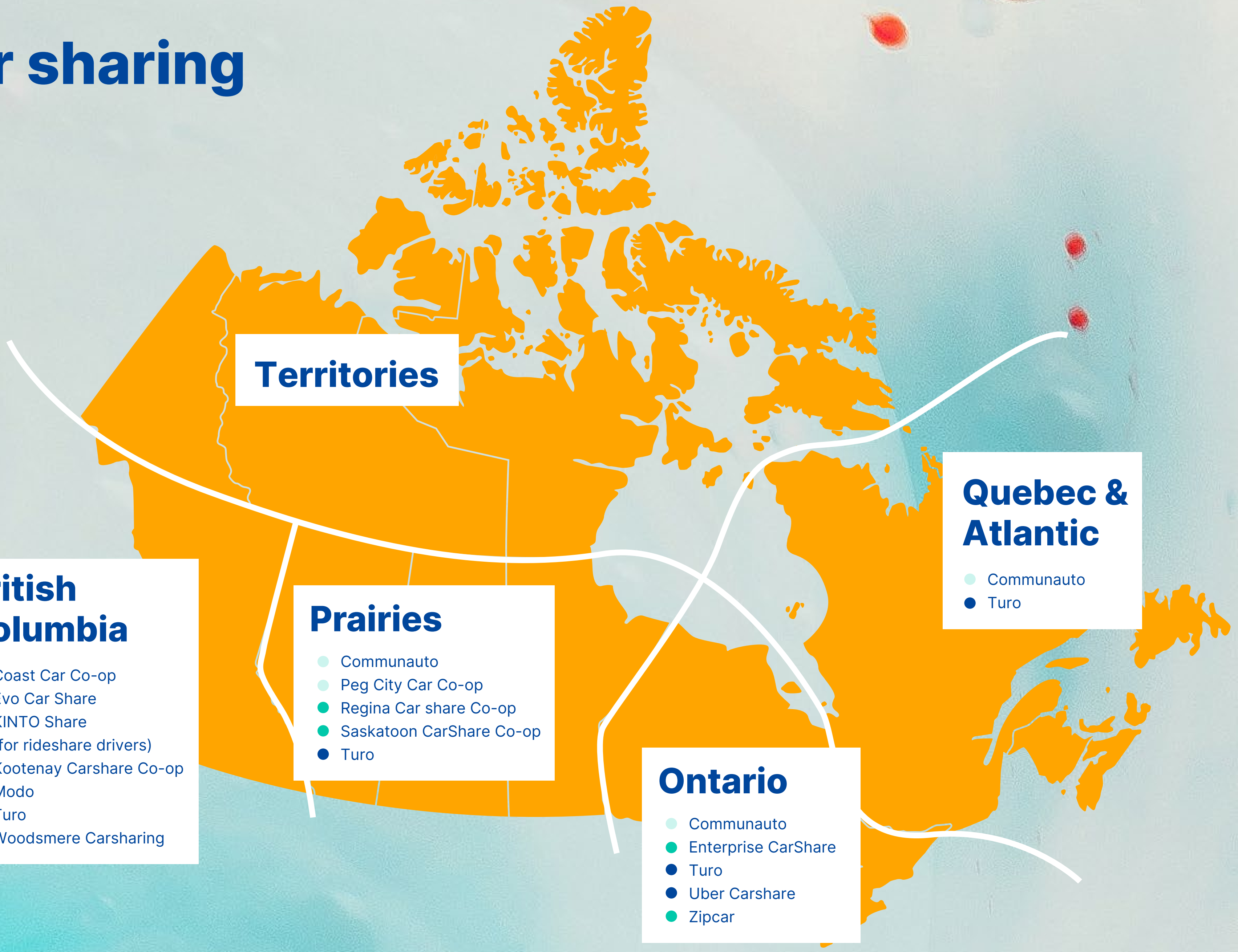


Main car sharing business model of the operator:

- Free-floating car sharing
- Station-based car sharing
- P2P car sharing
- Tele-operated car share

Info: The operators listed above are examples of active companies and do not necessarily represent the full market for car sharing options. Therefore, this map is intended to provide an overview of the widespread availability of car sharing services across different regions.

Selected regional car sharing operators in Canada



Main car sharing business model of the operator:

- Free-floating car sharing
- Station-based car sharing
- P2P car sharing
- Mixed models

Info: The operators listed above are examples of active companies and do not necessarily represent the full market for car sharing options. Therefore, this map is intended to provide an overview of the widespread availability of car sharing services across different regions.

Selected regional car sharing operators in Mexico

Mexico

- Beepy
- Drivana
- Keko
- Mazmobi
- Punto

Main car sharing business model of the operator:

- Station-based car sharing
- P2P car sharing

Info: The operators listed above are examples of active companies and do not necessarily represent the full market for car sharing options. Therefore, this map is intended to provide an overview of the widespread availability of car sharing services across different regions.

Comparing the three national markets

Selected key observations of the markets

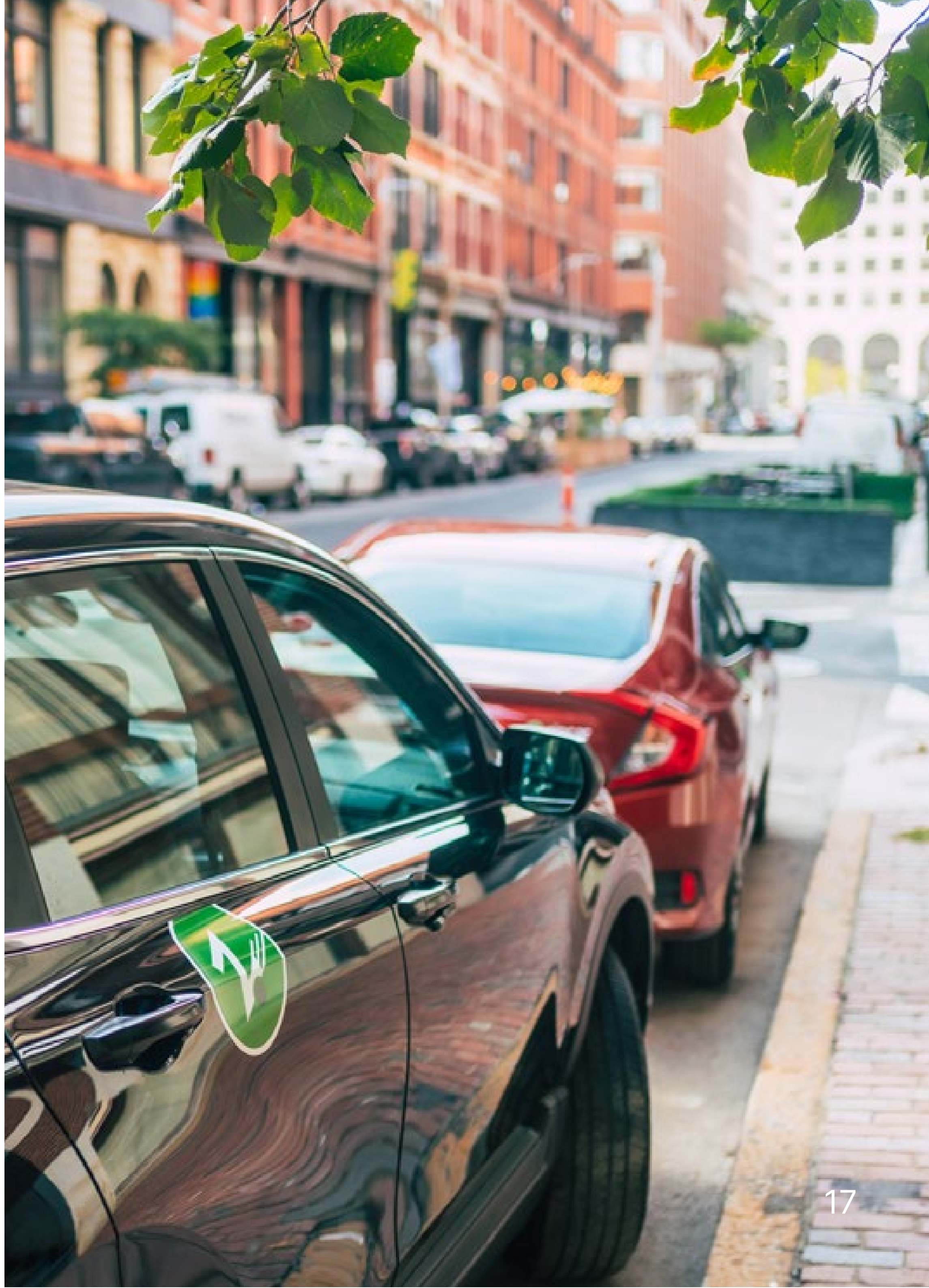
The US has the highest number of car sharing operators in North America, while Canada has the most car sharing cars per capita.

Mexico has the least developed car sharing market in North America, but it has been slowly picking up momentum in recent years.

The US and Mexico have several operators that cater to gig workers like Uber drivers; this is not as prevalent in Canada where the regulatory environment, municipal resistance, and insurance and liability issues delayed the arrival of those services.

The integration of car sharing into residential developments is a growing trend in all three countries, but in particular in Canada and the US.

Some operators use mixed or hybrid business models, combining station-based car sharing with free-floating services, etc.



The electrification trend

Electrification remains a sizeable opportunity

Many operators are offering electric vehicles (EVs) in their fleets. Many of them, like Blue LA, Envoy, and Evie Carshare have EV-only fleets. Other shared operators like Communauto, Evo Car Share, Modo, Zipcar, Enterprise CarShare have mixed fleets with internal combustion and electric engines, or hybrid vehicles.

According to our data, the Chevrolet Bolt is the most widely adopted EV model (number of operators) among North American car sharing operators. The Tesla Model 3 and Nissan Leaf are also commonly deployed EVs.

Most all-electric fleets in North America are currently in the United States. As of February 2024, there are over 60,000 charging stations in the U.S. According to Pew Research Center, six in ten Americans now live within 2 miles of a public charger (Pew Research Center 2024).

Typical vehicle brands and models

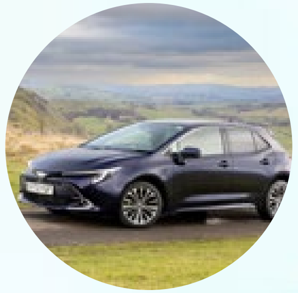
A selection of 14 cars out of 20+ brands and 75+ models in North American car sharing*

Honda Fit

Toyota Camry

Nissan Leaf (EV)

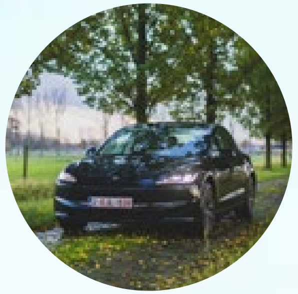
Toyota Tacoma



Toyota Corolla

Nissan Sentra

Nissan Rogue



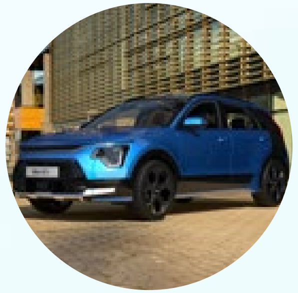
Tesla Model 3 (EV)

Hyundai Elantra

Chevrolet Bolt (EV)

Ford Escape

Toyota Prius



Kia Niro

Kia Forte

***Info:** P2P car sharing excluded for this KPI. Since P2P car sharing utilizes private vehicles, the diversity of makes and models in P2P is a lot higher than for other car sharing business models.

3

Operator examples

16 selected examples from the North American market

Examples of car sharing operators (1/4)

Insights into selected operators

	Communauto	Zipcar	Getaround	Turo
	Communauto is a long-standing Canadian provider of station-based and free-floating car sharing. Also active in France. Plans to have over 7,000 vehicles by the end of 2024. Founded in 1994.	Zipcar is a prominent car sharing operator with over two decades of industry experience. Zipcar has a global car sharing fleet of more than 12,000 vehicles.	Getaround started in 2009 and offers P2P car sharing in the USA. The brand is also well-known across Europe. They also offer keyless P2P rentals and their own, corporate-owned cars.	Turo started as RelayRides in 2010 and has grown to become one of the largest car sharing operators in the world.
Vehicles used	Toyota Corolla, Chevrolet Bolt, Nissan Sentra, and other	Over 60 makes and models; Ford Focus, Nissan Altima, Honda CR-V, and other	Various models	Various models
Main business model	Station-based and free-floating	Station-based	P2P	P2P
Cities	Toronto, Hamilton, Montreal, Ottawa, Edmonton, Calgary, Halifax	Boston, NYC, Chicago, Los Angeles, Seattle, Toronto, Mississauga, and many more	Various cities across the US	Various cities across the US and Canada

Examples of car sharing operators (2/4)

Insights into selected operators

	Enterprise CarShare	Evo Car Share	modo.	FREE2MOVE
	Enterprise Mobility started its car sharing service in 2005 and rebranded to Enterprise CarShare in 2011. They acquired multiple carsharing operators in recent years.	Evo Car Share is the British Columbia Automobile Association's (BCAA) car sharing service, and one of the leading operators in Canada. They also intro-duced the round-trip service „Evo Return" in Surrey.	Modo is a co-op car sharing organization motivated to reduce car ownership by using their flexible membership plans. They also offer residential car sharing.	Stellantis-owned Free2Move offers a free-floating car sharing service in the USA. They are also very active in Europe.
Vehicles used	Toyota Corolla, Hyundai Ioniq, Kia Niro, and other	Toyota Prius Hy-brid and Kia Niro	Toyota Corolla, Kia Niro, Nissan Rogue, Honda Fit, and other	Jeep Renegade
Main business model	Station-based	Free-floating	Station-based (partially home-zone concept)	Free-floating
Cities	Toronto, as well as campuses across the US and Canada (e.g. Ohio, Ontario, Illinois, and New Jersey, Missouri, and other)	Vancouver metropolitan area, Victoria	Vancouver, Kelowna, Vic-toria, Nanaimo	Washington DC

Examples of car sharing operators (3/4)

Insights into selected operators

	GIG Car Share	BlueLA	GoForth	KINTO Share
	GIG Car Share launched in 2017 and is one of the few pure free-floating car sharing services in the USA. GIG is powered by the American Automobile Association.	BlueLA is a car sharing service which started in 2015 and was acquired by Blink Mobility later, thus restarting as a fully electric car sharing service.	GoForth Carsharing offers fully electric car sharing with a strong focus on underserved communities such as affordable housing developments.	Toyota-backed KINTO Share is focusing on gig workers as customer base. Their vehicles are available in Texas and California, while KINTO Share Canada is starting to offer cars in Vancouver.
Vehicles used	Toyota Prius Hybrid, Chevrolet Bolt	Chevrolet Bolt	Chevrolet Bolt	Toyota
Main business model	Free-floating	Station-based	Station-based	Station-based for gig workers
Cities	San Francisco, Seattle	Los Angeles (multiple communities)	Oregon, Washington State, New Mexico	Dallas, Fort Worth, Houston, Los Angeles, Vancouver

Examples of car sharing operators (4/4)

Insights into selected operators

	Drivana	KEKO	Punto	Beepy
	Drivana launched in 2023 and offers P2P car sharing to a growing user base in multiple areas of Mexico.	Keko, RDA Mobility's car sharing service, launched in Mexico in 2023 after gaining a base in Argentina.	Punto is a car sharing service focussing on gig workers, by offering them vehicles for their work at Uber or DiDi.	Beepy, launched in 2019, is a peer-to-peer car sharing service that enables Mexicans to either rent out their own vehicles or rent vehicles from others.
Vehicles used	Many different models	Chevrolet, Nissan	Nissan, Hyundai, Toyota	Many different models
Main business model	P2P	Station-based	Station-based	P2P
Cities	Mexico City, Monterrey, Guadalajara, Merida, Los Cabos, Cancun	Mexico City	Monterrey	Mexico City, Monterrey, San Luis Potosí, Merida, Toluca, Guadalajara, and other

Deep dive: P2P car sharing

Car sharing market places for private vehicles

In P2P car sharing, the vehicles are not owned by the operator, but by individuals or other companies. The P2P operator acts as an agent in between users and vehicle owners/ providers. The business model of the operators can be often described as platform or market place.

Operator examples from North America include Beepy (MEX), Drivana (MEX), Fluid Truck (USA), Getaround (USA), Kootenay Carshare Co-op (CAN), Turo (CAN, USA), and Uber Car Share (CAN, USA).

The fleet sizes can be very large. P2P car sharing operators tend to communicate global fleet sizes, rather than regional or national fleet sizes. Turo, for instance, reports a global fleet size of 350,000 vehicles (Turo 2024); Getaround another 75,000 active vehicles globally that can be rented on their platform (Getaround 2024).*

***Info:** The fleet sizes of P2P operators can‘t be directly compared to other car sharing business models. The average time of utilization tends to be smaller than for station-based car sharing or free-floating car sharing, as many private vehicles listed on P2P platforms are not listed 24/7 throughout the year.

Deep dive: Large vehicle sharing

From vans or pickups to bigger busses and campervans

The Toyota Tacoma is one of the most frequently chosen pickup truck models in the operator fleets we analyzed (it's used by Truqit, CarShare Vermont, Colorado Car-share, Hui Car and Ithaca Carshare, for example).

Classic transporters such as the Ford Transit or Ram ProMaster are also offered, mostly in Canada, for example by Modo, Zipcar and Enterprise CarShare.

Campervans, RVs and other kinds of camping vehicles are offered mostly through the P2P models. RV Share and Outdoorsy are good examples.

Car sharing operators that solely focus on larger vehicles include Fluid Truck and Truqit (pickups or cargo vans).

If you'd like to dive deeper into this topic, you can download our 33-page white paper on "[Large Vehicle Sharing in Europe and North America]"

Deep dive: Condo car sharing

Station-based car sharing for exclusive user groups

Condo car sharing or residential car sharing is a growing niche of North American car sharing. It's offered as an amenity to unit owners in condominiums, apartment complex residents, or even hotel guests. There are different types of condo car sharing, but they all provide a service to a limited group of customers.

Examples of well-known operators in this sector include Zipcar, EV Mobility and Envoy, as well as Woodsmere Carsharing and Modo.

Electric vehicles are popular in this space. Examples: Envoy, PERC Carshare, Kite Mobility.

In our research, we identified only a few operators that focus on condo car sharing (for instance Envoy, EV Mobility, Kite Mobility, Quantum Mobility, mondofi), but many others offer it as part of their B2B service (Zipcar, Colorado Carshare, etc.).

Deep dive: B2B delivery/gig car sharing

Some operators specifically address the needs of gig workers

With the rise of the gig economy, car sharing operators have identified an opportunity to provide vehicles to gig workers for their jobs. The gig economy encompasses businesses such as ridesharing, ride-hailing, and food delivery through platforms like Uber, Lyft, DoorDash, or Instacart.

Focusing on this workforce segment, operators such as KINTO and HyreCar offer car sharing vehicles in setups that differ from traditional models. Weekly rentals are common.

As a result, these services often straddle the line between B2B car sharing and long-term rental. Companies like KINTO, Punto, Buggy TLC, and HyreCar facilitate account linking with Uber and other gig services.

Deep dive: Community car sharing

Non-profit car sharing, car sharing for low income communities, and co-ops

Some of the operators we studied specialize in car sharing tailored for smaller communities, with a particular focus on serving low-income communities. Car sharing programs aimed at these demographics have received funding from the U.S. Department of Energy's Vehicle Technologies Office and the Affordable Mobility Programme (AMP).

Under the AMP and other sustainable and clean mobility projects, several car sharing pilots and projects have been launched, including GoForth Carsharing, Evie Carshare, Hourcar, BlinkLA, Good2Go, and Colorado Carshare.

Other car sharing initiatives that target smaller communities have been initiated or supported by Mobility Development. Miocar, DRIVE CDTA, Floshare, Michigan Carshare, and ZEV Co-op are part of this group.

Many of these operators focus on clean and sustainable car sharing, using only electric vehicles such as the popular Chevrolet Bolt. In addition, all of these operators are non-profit.

In Canada, community-oriented car sharing programs are prominent, often organized as cooperative-based models and also operated on a non-profit basis. Examples include Peg City Car Co-op, Saskatoon CarShare, and Coast Car Co-op.

4

Interviews

Talking to experts from the US, Canada, and Mexico

What do the car sharing experts have to say?

We invited some leading car sharing voices and researchers to share their insights

This white paper is a joint effort from many people. For this section, we sat down with five industry experts and asked them four questions designed to uncover insights on their specific car sharing expertise.

The experts that we interviewed run operations in Canada, Mexico, and the USA.

Our interview takeaways not only build on the previous meta report findings but add further ideas, thoughts, hypotheses, impressions and facts. Check out the following pages to learn about North American car sharing directly from operators.

Angelo Adams

(President)

Zipcar

USA & Canada

Zipcar is a large global car sharing provider that focusses on station-based car sharing but also provides free-floating services in the UK. Their fleet of 12,000+ vehicles can be found in markets like the USA, Canada, and the UK.

zipcar.com

How would you describe the evolution of car sharing in the US?

Since 2000, Zipcar has envisioned a world where car-sharing outnumbers car ownership. What started as a few cars in Cambridge, MA, has grown to over 12,000 vehicles worldwide with strong, decades-long partnerships in major cities across North America. Providing subscription access over ownership is a business model Zipcar pioneered and since then, several other categories have launched and have been referred to as the "Zipcar of" designer clothing, real estate, music — you name it.

As cities, universities and businesses urgently seek sustainable transportation to address climate change, congestion and equity issues, we are seeing an increased interest in car sharing. For twenty-five years, Zipcar has been an indispensable mode of transportation allowing people to drive on-demand 24/7 while also making a social and environmental impact on the communities we serve.

Zipcar has a presence on many campuses across the country – how does car sharing at universities and colleges differ from your urban deployments?

Zipcar is the largest and most longstanding campus car-sharing provider with a presence at hundreds of colleges and universities across North America. Since 2001, we have served as a critical component for creating and advancing sustainable transportation initiatives on campuses nationwide, providing students, faculty and staff an easy way to drive without bringing a personal car to school. Approximately 80% of Zipcar university members do not own a vehicle on campus. Fewer personal vehicles on campus reduces congestion, parking competition and carbon emissions while freeing up valuable space.

Zipcar further supports the campus experience and the next generation of mission-driven leaders, through our signature back-to-school grant campaign, Students with Drive. Students with Drive first launched in October 2011 and has provided over one million dollars in funding plus access to Zipcars to empower more than 400 student groups across the country.

What's the potential for car sharing at condos? Can you share some insights from one of your condo offers?

Housing and transportation go hand in hand, especially in densely populated areas with multi-unit housing and a need for affordability. Car sharing reduces the cost and hassles of car ownership for residents while boosting sustainability efforts and reducing overhead costs for property managers. Each car-sharing space can eliminate the requirement for a developer to build a specific number of regular parking spaces and can save thousands in construction costs per development, allowing properties to reduce the square footage of parking versus housing. Plus, car sharing can provide points toward LEED certification.

For example, Pacific Gate, a luxury condominium complex in San Diego, CA, stands out from other area properties by providing free access to Zipcars as an amenity to its residents. For residents, the on-site vehicles—exclusively for their use—provided a convenient and affordable way to drive. Zipcars can be booked 24/7 on demand and include gas, insurance, maintenance and dedicated on-site parking. As a result, Pacific Gate's 200 residents are condo car-sharing converts and have eliminated the costs and hassles of owning a car while lowering carbon emissions by more than 300,000 pounds by sharing.

How does Zipcar and car sharing in general contribute to the sustainability of the mobility sector?

Independent studies show that Zipcar's round-trip model of car sharing has a positive impact on the environment and supports carbon neutrality goals set by the public and private sector. Car-sharing members have a lighter carbon footprint than non-car sharers: each member reduces their carbon footprint by 1600 lbs. per year and each member drives 40% fewer miles after joining Zipcar because they depend on a diverse mobility network – walking, scooters, biking, public transit - for their transportation needs, driving only when necessary. Zipcar already makes a meaningful contribution to reducing carbon emissions, and this does not even consider the benefits derived from electric vehicles.

Additionally, we share a vision with our members, cities, and partners across the globe for a more sustainable and equitable future. Zipcar is a longstanding supporter of the National Association of City Transportation Officials (NACTO) and operates in hundreds of cities. Our partnerships with New York City's "On-Street Carshare" program, Pittsburg's "Move PGH" program and "Sacramento's "Our Community Car Share" program" are a few tangible examples of how we support the sustainability of the mobility sector. And, as a founding member of Shared Use Mobility Center (SUMC), Zipcar joins public and private industry partners to advance the Shared Mobility 2030 Action Agenda so that equitable, low-carbon shared mobility will be more convenient, affordable and accessible than owning a personal vehicle car.

Scott Neely

(Corporate Rental Manager)

Enterprise CarShare & Car Club

USA & Canada

Enterprise Mobility is a well-known global car rental and mobility brand. Enterprise CarShare operates station-based car sharing services in select markets. They focus on different target groups such as campuses and universities, businesses or B2C customers, depending on the location.

enterprisecarshare.com

Why does it make sense for Enterprise Mobility to have carsharing in its portfolio?

Enterprise CarShare is part of Enterprise Mobility, a global network of mobility solutions serving consumers, businesses and governments. Having our entire portfolio of offerings together helps us to invest heavily and be flexible to meet customer mobility needs today and in the future. Enterprise CarShare plays an important role in helping cities and businesses shape their future transportation needs. We continue to invest in solutions to stay at the forefront of technological developments in the industry.

Your car sharing service is available in several countries: What are the differences between the US, Canadian and UK car sharing markets?

Enterprise CarShare and Enterprise Car Club operate carsharing programs in North America, France, Spain and Germany, as well as the U.K. and Ireland, respectively. Both brands offer localized flexible mobility alternatives and play an important role in helping cities and businesses shape their future transportation needs. The markets where we have carsharing programs are similar across countries. They are all walkable, densely populated areas with public transportation options. We know customers could use a variety of public transportation options such as taking the train, the bus, walking, or biking. But sometimes they need a car. We know customers enjoy having easily accessible vehicles for the occasions where it is the best option.

What are some of the challenges the car sharing business is facing?

Challenges for carsharing businesses typically revolve around changing local market conditions and customer experience. At Enterprise Mobility, we have leaders living and working in every market where we operate to understand local challenges and expectations and deliver exceptional customer service when and where our customers need us. We know customers' expectations change over time, and we must change with them to solve mobility challenges. By combining modern technology, developing new tools and streamlining processes, we're optimizing customer experiences.

What is your experience with business use of your car sharing service? How can a car sharing company differentiate itself from other company car offers?

Enterprise CarShare is a flexible alternative to traditional business travel. We develop custom programs for businesses, governments and universities based on an organization's size, needs and goals. These memberships range from placing a few cars near the building, to offering a private fleet for employees only. Enterprise Mobility has the world's largest and most diverse fleet of vehicles. When organizations rent from Enterprise CarShare, they can choose from a variety of newer models and well-maintained vehicles. We will evaluate an organization's needs and suggest specific car models that best fit the organization. We offer a large and diverse fleet, including fuel-efficient vehicles, SUVs, cargo vehicles, electric and hybrid models.

Marco Viviani

(Vice President)

Communauto

Canada

Communauto is a long-standing Canadian provider of station-based and free-floating car sharing. Also active in France. Plans to have over 7,000 vehicles by the end of 2024. Founded in 1994.

communauto.com

What are some key lessons from combining round-trip & free-floating car sharing?

Since 2013, Communauto has operated both station-based and free-floating services. These two services, now available in 8 cities across Canada and sharing the fleet equally, have progressively merged to offer a combined service where users can reserve either free-floating or station-based vehicles for the same usage and at a similar price and user experience. The main results include improved quality of service, better distribution around the city, and increased availability even at the last minute and during peak periods. Additionally, the impact on demotorization and car usage reduction remains as strong as it would be with only a station-based service.

What are the key learnings from growing Communauto from small to over 5,000 vehicles?

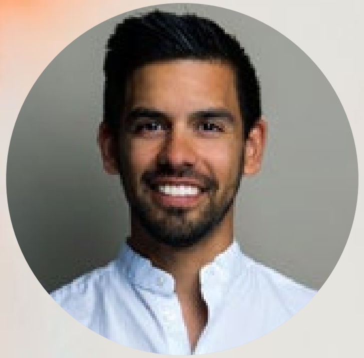
Communauto started in 1994 with three cars and will have over 7,000 by the end of 2024, operating in about 20 cities in Canada and France. Key learnings include resilience in navigating challenges, a long-term vision for sustainable growth, and strict cost and price control to balance affordability with financial sustainability. Founder Benoit Robert and the dedicated staff have been crucial in maintaining these principles. Community and stakeholder engagement have also secured support and integrated car-sharing into urban environments. These strategies have enabled Communauto to grow while staying true to its social and environmental mission.

What recent innovations have you added to your service?

Communauto is working to integrate a P2P option into its services while electrifying its fleet. Recently, the company combined free-floating and two-way services to create “station zones” to rapidly increase the fleet and address challenges in finding new parking spaces and complying with parking regulations. In Montreal alone, the station-based offer increased by almost 1,000 units per year in the last two years. Unlike a regular station in a fixed location, a “station zone” is a small walkable area with a radius of typically 500 meters. Vehicles in these zones are parked on the street and can be located anywhere within the boundaries. They do not have fixed parking spots but can be reserved in advance and must be returned to the zone at the end of use. A further innovation consisted in internalizing partially car maintenance with a creation of a subsidiary dedicated.

How do you see the future of car sharing in Canada?

Organic growth of car-sharing adoption is still strong in Canadian cities, and we believe it will continue rapidly. The challenge will be to preserve the quality of service, transform the regulatory framework to allow for increased offerings, adapt logistics to different scales, and control costs to ensure affordability. Fleet electrification is a definitive trend despite current challenges. Additionally, private fleet sharing and car automation will bring new opportunities. Car sharing, as we know it, is here to stay, and the job to adapt and evolve will continue.



Dagoberto Cedillos

(Founder & CEO)

Punto

Mexico

Punto is a Mexican car sharing service that focuses on gig workers by offering vehicles for their work at Uber or DiDi. Customers can book their vehicles either short-term (hours) or long-term (days and weeks).

punto.app

How would you describe the Mexican car sharing market?

Car-sharing in Mexico is still in early days. Mexico is a broad country with various large cities but only a few which have a population density that hit the sweet spot for car-sharing, such as Mexico City. Therefore, car sharing has not yet been a concept that has been widely adopted. The use case for Punto is slightly different to traditional car sharing however, as we focus on providing a tool for work rather than just a medium for travel.

How does Punto work? Can you explain your focus on gig economy workers to us?

Punto offers a fleet of vehicles available for short or long term hire with the purpose of being used to work as a driver in rideshare and/or delivery platforms. The characteristics of the vehicles, pricing and user experience are all tailored for this specific use. Punto aims to maximize profit generation for these driver customers by leveraging economies of scale in fleet acquisition, maintenance and insurance as well as by having a dedicated team and fleet with characteristics suited for this end use.

A reason why car-sharing is a good fit with the gig economy use case is that drivers relying on this source of income need to minimize the down-time of their vehicle as much as possible. Occupancy and driven kilometers in each of our vehicles is much higher than for a traditional car-sharing fleet, and therefore maintenance, wear and tear naturally as well. If a customer experiences an issue with their vehicle, they have the possibility of swapping and working without interruption. Of course, additional wear and tear is priced in our offering, but the reduction of down-time is key and far outweighs this cost premium.

How do you select your vehicle models and what's your experience with them?

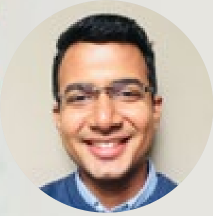
Because of our use case, we put a lot of focus into choosing vehicles that are extremely reliable and safe for our driver customers as well as their passengers. We purchase vehicle models that have been truly tried and tested, and which have spare parts that are broadly available.
We also install a CNG (compressed natural gas) retrofit for fuel cost reduction on our entire ICE fleet and therefore take into account various technical engine requirements. We've learned through experience that very novel vehicle models are not optimal to operate in car-sharing as technical issues and delayed sourcing of parts can affect your business' profitability.

What can be done to take car sharing in Mexico to the next level?

I believe available technologies are already at a level which make the customer experience very efficient, both from the vehicle hardware (sharing and telematics) and the customer (smartphone and digital payments) side of things. Greater adoption will naturally come as cities grow and develop, and as the market demands it.

Sandra Phillips

(Founder & CEO)



Venkatesh Gopal

(Principal e-Mobility & Financial Feasibility)

movmi
Canada

movmi is a consulting agency focused on shared mobility, from micromobility, car-sharing to Mobility-as-a-Service. They specialize in Shared Mobility Architecture: the design, planning and growth of shared mobility services. movmi's team works with public as well as private sector organizations and has been involved in over 85 shared mobility projects worldwide.

movmi.net

Can you name the pioneering car sharing operators in North America? When did car sharing begin in North America?

The launch of Communauto in Quebec City, Canada in 1994 marked the start of car-sharing services in North America. This was followed by Modo car-share, AutoShare, and CarSharing Portland launching in Vancouver, Toronto, and Portland respectively. These along with Flexcar and Zipcar could be considered as the pioneering operators in the region. With these operators, car-sharing was primarily station-based and round-trip, until car2go brought the free-floating car-sharing model to North America in 2012.

What is movmi's current estimate of the size of the North American car sharing fleet?

Our research and analyses estimate the car-sharing market in Canada, the US, and Mexico together to be around 30,100 vehicles (excluding peer-to-peer car-sharing).

Can you share your perspective on the outlook of North American car sharing, the industry's health, and trends?

Speaking of the broader industry, as capital costs continue to rise, we observe interest peaking in self-drive, on-demand car-sharing models among traditional car rental organizations. The on-demand carsharing model appeals to corporate employers and B2B organizations as a more environmentally sustainable alternative to offer to their employees as benefits. Meanwhile, car-sharing operators across the region continue to have unmet demand and have been scrambling to add new vehicles to their fleet. Insurance rates continue to balloon which has caused operators to look for prudent fiscal management measures.

Electrification remains a sizeable opportunity, and cities and higher levels of government are taking steps to support car-sharing businesses. Case in point, multiple Federal and State government grants in the US were announced and awarded starting in 2023. The same year, the Canadian Federal government increased the vehicle limit for electric vehicle rebates for a carshare operator from 10 to 50 vehicles.

You are living in the Vancouver metropolitan region. What is your take on the local car sharing ecosystem?

Vancouver is lucky to have multiple car-sharing models thriving in the region. Between Evo, Modo, and Turo, the residents have a free-floating, station-based round-trip, and a peer-to-peer service to choose from. The cities in the Metro Vancouver area have been showing their support with preferential parking rates and promoting car-sharing as a part of their climate action plans. All carshare users can park for free for up to 2 hours (during a trip) at any of the metered and non-metered parking within the City of Vancouver which acts as a small 'thank you for sharing' incentive and goes a long way in reducing friction in the user journey. Just last month, the City eliminated minimum parking requirements citywide for developments. This only adds to the sustainability efforts in the region to drive more users towards alternative modes of transportation including car-sharing.

The operators have reciprocated by adding vehicles, locating them strategically to make it easier for users to live car-free and be able to connect to other public transport modes. For instance, placing vehicles at the SkyTrain station locations and ferry terminals and making that intermodal exchange possible in the physical world.

Digital integration is great too, when done well. movmi has been working on the region's first Mobility-as-a-Service pilot, RideLink, with Evo, Modo, Mobi (Vancouver's bike-share system) led by TransLink. This is a multimodal mobile app that enables users to plan, book, and pay for all these services. We are excited to see how well this is utilized and supports the users to consider a multimodal lifestyle. Through data analysis, we hope to understand the effect on car-sharing usage when integrated into public transport and micromobility networks.

5

Trends

Our Top 5 North American Car Sharing Trends

Top-level trends

General insights into the North American car sharing landscape

Operator growth with MaaS platforms

In Europe, the integration of car sharing into Mobility-as-a-Service (MaaS) apps has become widespread across many cities. However, in the US and Canada, this approach is still in its nascent stages, with operators beginning to experiment with initial integrations. One such example is RideLink, a recently launched MaaS initiative in Vancouver.

Blurring of the boundaries across business models

There is a noticeable trend towards the convergence of traditionally distinct car sharing models. The boundaries between free-floating, station-based, peer-to-peer, and even car subscription and automated rentals, are becoming increasingly blurred. Many operators are now integrating combinations of these models into their service offerings.

Decreased OEM involvement in car sharing

In recent years, there has been a decline in car sharing services operated directly by Original Equipment Manufacturers (OEMs). While a few years ago these services were quite popular, today Stellantis' Free2move and Toyota's KINTO remain prominent examples of OEM-driven operators. Former OEM-owned car sharing programs include Maven (GM), car2go (Daimler/Mercedes), ReachNow (BMW), and Mocean Lab (Hyundai).

Top-level trends

General insights into the North American car sharing landscape

Initial trials of teleoperated car sharing fleets

Las Vegas has seen the introduction of the first teleoperated car sharing services. Companies like Vay and Halo are pioneering this unique approach to car sharing. In these services, a booked car is delivered to the customer by remote drivers. The customer then manually drives the car to their destination, exits the vehicle, and a remote driver takes over once more. This eliminates the need for customers to search for parking spots.

Non-profit, co-op and community car sharing are emerging niches

There is a growing presence of non-profit organizations, cooperatives of various sizes, and community-based car sharing operators in the US and Canada. These operators focus on providing car sharing services tailored for smaller communities, emphasizing sustainability. Many of them exclusively offer electric vehicles (EVs). Additionally, there is a notable trend of subsidized rates aimed at supporting low-income communities.

6

Summary and Outlook

Main takeaways

Summary

Key insights from the white paper

We identified over 70 North American car sharing operators with at least 2.4 million members and tens of thousands of vehicles in station-based and free-floating services, plus hundreds of thousands of additional vehicles and users in P2P operations.

Major operators in the North American market include Communauto, Evo Car Share, Enterprise CarShare, Getaround, GIG Carshare, KINTO, Modo, Turo, Zipcar and many more. North American operators offer a wide variety of vehicle models.

The operators we researched offer 75+ vehicle models from more than 20 brands. Models include standard passenger cars, SUVs, transporter and cargo vans, as well as pickups and electric vehicles.

Summary

Key insights from the white paper

The USA leads as the largest North American car sharing market by fleet size, while Canadian station-based and free-floating operators boast the highest ratio of car sharing vehicles per capita. In Mexico, car sharing constitutes an emerging market segment.

Compared to Europe, the North American market exhibits distinct trends such as condo car sharing and services tailored for gig workers, which are increasingly prominent. Community-focused car sharing initiatives are also gaining popularity.

Many operators are offering electric vehicles (EVs) in their fleets. Many of them, like Blue LA, Envoy, and Evie Carshare have EV-only fleets. Other shared operators like Communauto, Evo Car Share, Modo, Zipcar, Enterprise CarShare have mixed fleets with internal combustion and electric engines or hybrid vehicles.

Emerging trends include tele-operated car sharing and Mobility-as-a-Service (MaaS) partnerships like RideLink in Vancouver.

7

About and Sources

Who is INVERS and further reading

About INVERS

Who we are

INVERS, inventor of automated vehicle sharing, enables mobility service providers to launch, operate and scale their services with integrated hardware and software solutions. As the world's first shared mobility technology company, Invers is developing and reliably maintaining the fundamental building blocks at scale to offer cost-efficient and easily implementable tech solutions.

We act as an independent and reliable partner for operators of services such as car sharing (free-floating, station-based, P2P), car rental and subscription with the vision to make the use of shared vehicles more convenient and affordable than ownership. Customers include Miles, Greenwheels, Share Now, Cambio, GreenMobility, Getaround, or Flinkster. The company was founded in 1993 and has locations in Siegen, Cologne and Vancouver. The development takes place entirely in Germany.

Want to start your own car sharing service?

INVERS has everything you need to connect your fleet, automate operations, and grow without restrictions

Create the fleet you need

Add any car to your fleet with our vehicle-agnostic solution and speedy installations to expand quickly and meet your customers' needs.

Automate your rentals

Ensure seamless handovers and enhance your customer experience with fully automated handovers anytime, anywhere.

Protect your assets

Safeguard your fleet with real-time AI Damage Detection, fleetwide driving behavior monitoring, and remote overwatch to help protect against thefts.

Optimize vehicle usage

Get the most out of each car by minimizing downtime and increasing rentals with speedy installations, best-in-class connectivity, and insights into your fleet usage.

Contact our carsharing experts to discuss your needs.

Get in touch >

Other free INVERS reports and white papers that you will enjoy reading

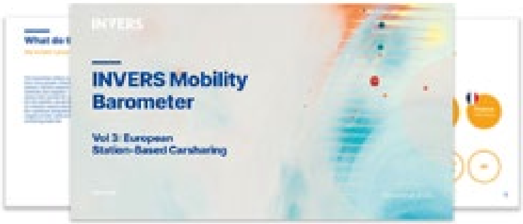
European Free-Floating Carsharing Barometer

(57 pages)

Why read it?

- The #1 European comparative market research resource on free-floating carsharing
- Insights from 50,000+ vehicles
- 90+ operators analyzed
- Interviews with national carsharing associations and researchers from Germany, Italy, France, Poland, and Belgium

Read the Barometer



European Station-Based Carsharing Barometer

(50 pages)

Why read it?

- The leading European market overview for station-based carsharing
- Insights from 55,000+ vehicles
- 400+ operators analyzed
- Interviews with the national carsharing associations of Germany, France, Spain, and the United Kingdom

Read the Barometer

White Paper: Large Vehicle Sharing in Europe and North America

(33 pages)

Why read it?

- Get first insights into the European and North American market on LCVs and MPVs such as vans, transporters or RVs
- Get an overview of major key players in this dynamic market
- Learn about use cases like moving, IKEA, heavy transport, vacation, group rides, or corporate use

Read the White Paper

INVERS webinars: Exploring car sharing expertise

Unlock valuable insights with industry experts

Growing and Scaling Car Sharing Fleets - Lessons Learned

- Key considerations before scaling
- Identify signs that your telematics systems might be holding you back
- Keeping the total cost of ownership and operations low

Speakers

- **Kinto** (Jason Zahorik, Group Manager)
- **Kinto** (Jimmy Ouyang, National Manager)
- **INVERS** (Chris Anderson, Sales Director)

Watch the webinar

User Insights on AI-Powered Vehicle Damage Detection

- How much damages are really costing you: it's more than just the cost of repairs
- What makes a technology integration pilot successful: how should you work with your tech partners?
- Results from the pilot

Speakers:

- **MyWheels** (Daantje Rijnja, Damage Detection Specialist & Project Manager)
- **carvaloo** (Dr. Tom Althoff, Managing Director & Co-Founder)
- **INVERS** (Rudy Six, CEO of INVERS Mobility Solutions, Canada)

Watch the webinar

Crucial Lessons from Growing Shared Mobility Operations

- North American perspective
- The pros and cons of running your own operations vs. contracting it out
  What you need to know about the market you're entering, and how much time is needed to plan before launch

Speakers:

- **movmi** (Sandra Phillips, Founder & CEO)
- **Mondofi** (Leigh Angman, Founder)
- **INVERS** (Chris Anderson, Sales & Partner Manager)

Watch the webinar

Sources

Where we got our info from and further reading tips

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Getaround (2024): Getaround Investor Presentation. Wedbush Disruptive Transportation Conference. LINK

Shaheen, S. et al. (2006): Carsharing in North America Market. Growth, Current Developments, and Future Potential. LINK

Shaheen, S., & Cohen, A. (2020): Innovative Mobility: Carsharing Outlook Carsharing Market Overview, Analysis, And Trends. UC Berkeley: Transportation Sustainability Research Center. LINK

Turo (2024): What is peer-to-peer car sharing? LINK

Picture Credits

Where we got our pictures from

Page 8: Communauto. LINK
Page 10: Kootenay Carshare Co-op. LINK
Page 17: Zipcar. LINK
Page 28: Punto. LINK
Page 42: vay. LINK

Imprint

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Special thanks

We'd like to especially thank all of our interviewees, the mentioned national carsharing organisations, research institutions and supporters that helped in realizing this report

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Suggested quotation

INVERS GmbH (2024):
Car Sharing in North America. White Paper.
https://go.invers.com/en/resources/white-paper-car-sharing-in-north-america