

CARSHARING AS PART OF THE MaaS ECO-SYSTEM

WIEN

29.06.2017

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PORTRAIT

German CS-market, Bundesverband CarSharing e.V.

German Market

- 17.200 cars
- 1.715.000 customers
- 600 Cities + Communities (12 with free-floating CS)
- 150 Providers

Bundesverband CarSharing e.V.

- est. 1998
- 130 Providers

THE PROBLEM WITH CARS

Private cars own households

Car-Ownership* Cost per month

Fixed costs	89 €
Driving costs	47 €
Repair & service	35 €
Total	171 €

New car:

Loss of value	245 €
Total	416 €

Multimodal mobility Cost per month

Monthly ticket PT**	81 €
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Free mobility-budget	90 €
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~ 200 km carsharing

Free mobility-budget	335 €
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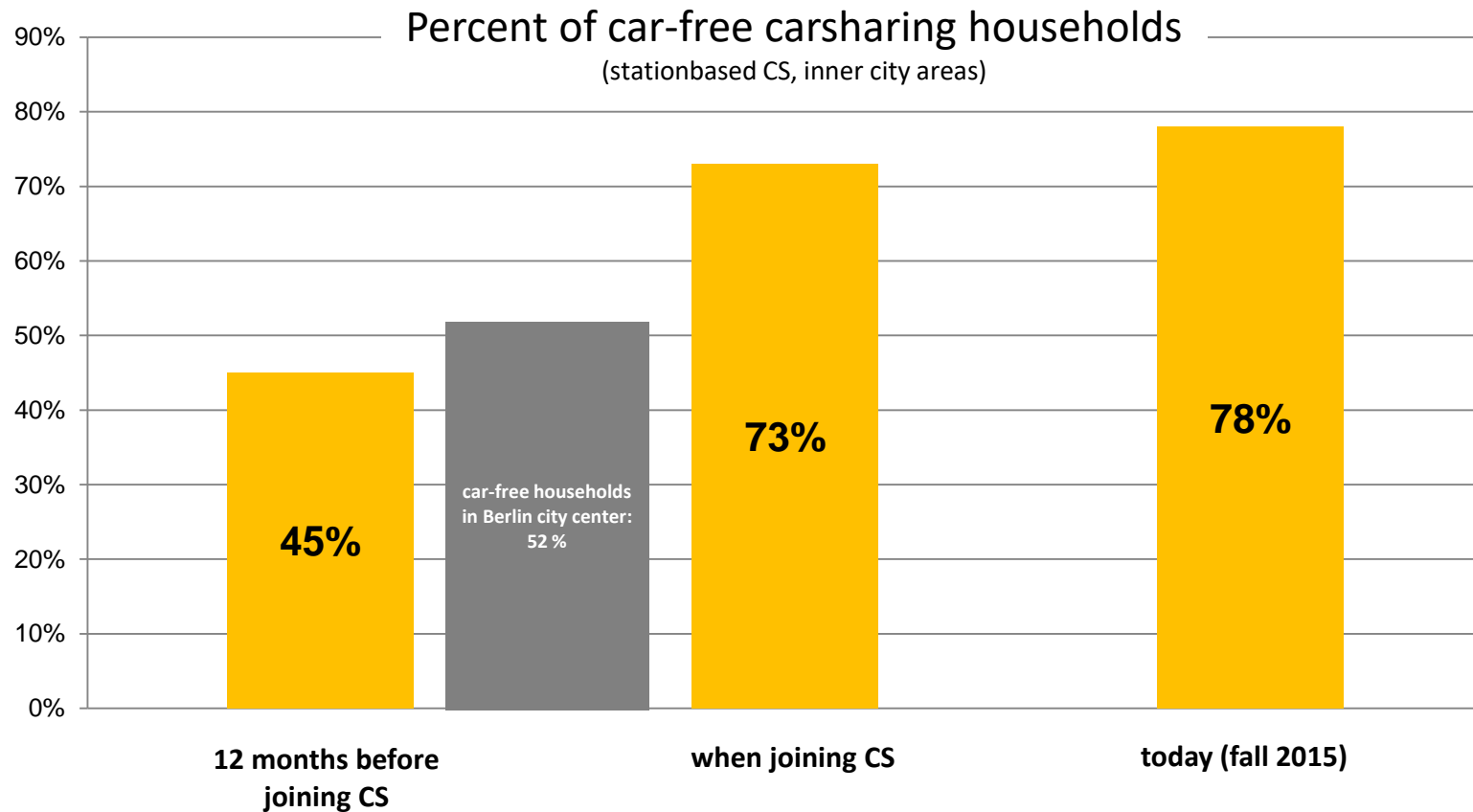
~ 850 km carsharing

*VW Golf 1.0 TSI BlueMotion
Comfortline according to ADAC, 2017
5.000 km/year
5 years of ownership

**Umweltkarte BVG Berlin, zones AB
2017

THE IMPACT OF CARSHARING

Carsharing makes households car-free

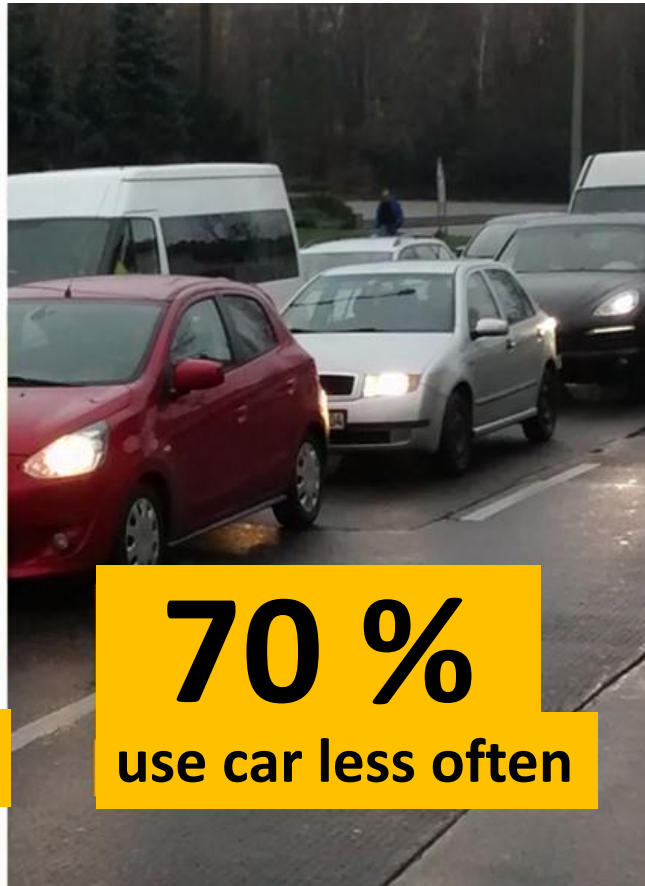


THE IMPACT OF CARSHARING

Carsharing changes mobility habits



32 %
use bike more often



70 %
use car less often



40 %
use PT more often

Impact of carsharing on customers of stationbased services that got car-free and live in innercity areas, bcs 2015

CARSHARING AND THE MaaS-SYSTEM

Learning 1

CarSharing needs **PT** and a good **bike-infrastructure** as its complements.

CARSHARING IN GERMANY

Market share

~ 2%

(CarSharing market share varies slightly according to market definition)

CARSHARING AND THE MaaS-SYSTEM

Learning 2

CarSharing needs MaaS as a
marketing platform.

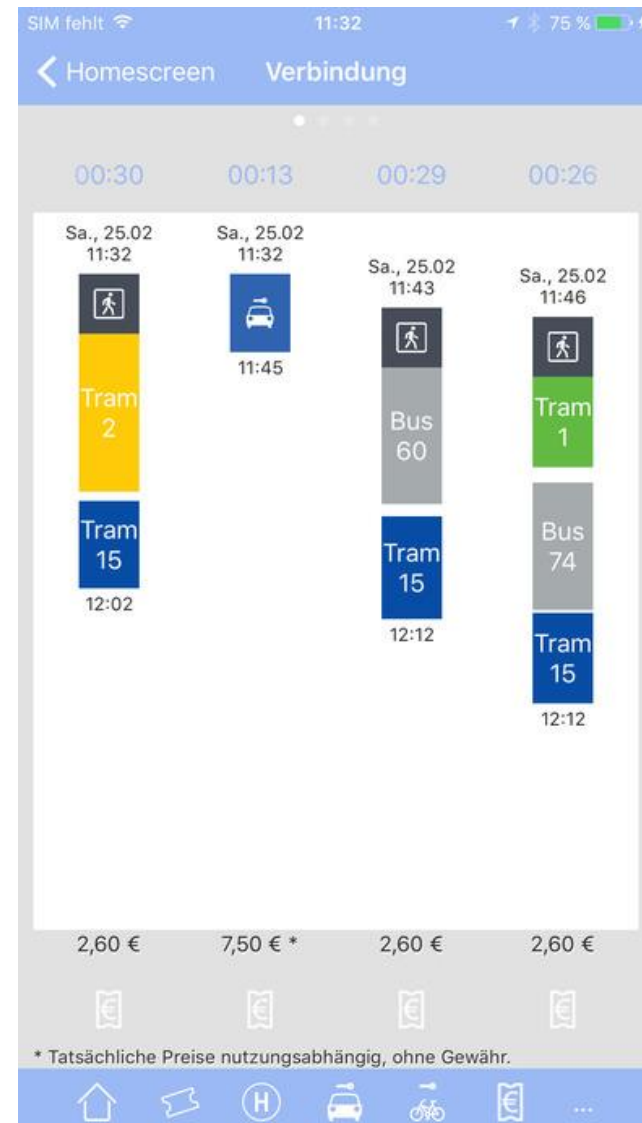
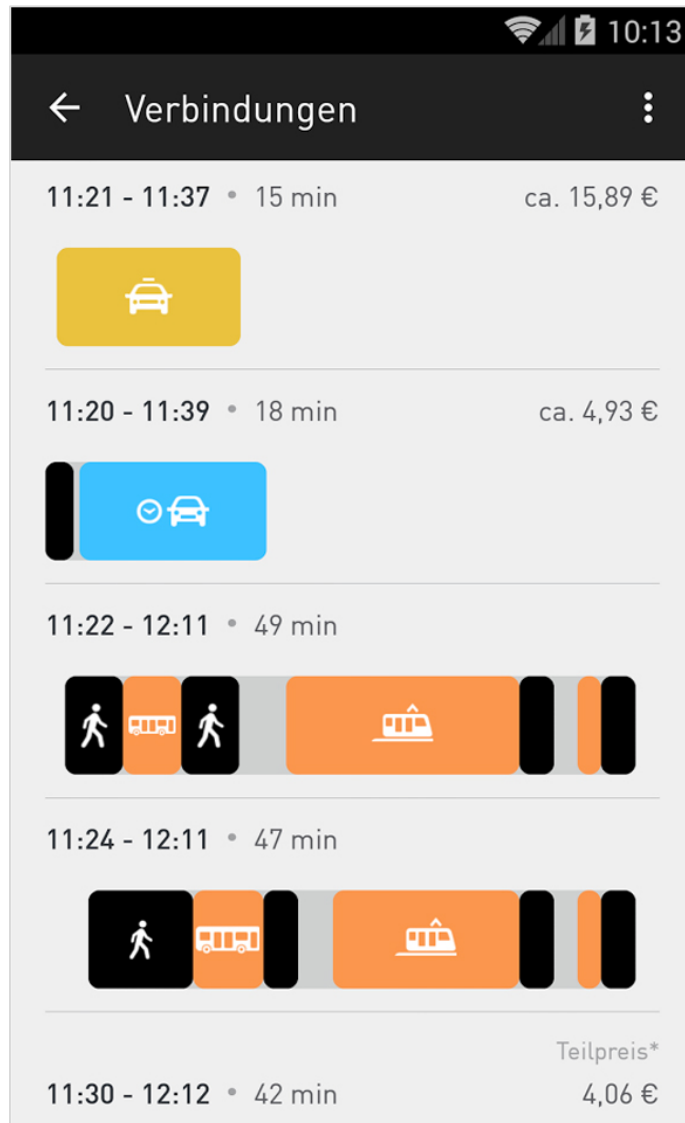
CARSHARING AND THE MaaS-SYSTEM

Recent results (D)

Platform	Product	App-Users	CS-Customers
Platform 1	CarSharing-Shop	800.000	2.300 (3 CS-services)
Platform 2	Integrated	25.000	450 (1 CS-service)

PROBLEMS WITH MaaS TODAY

MaaS-providers (sometimes) don't understand CarSharing



PROBLEMS WITH MaaS TODAY

MaaS-providers don't sell CarSharing as a solution



- 20 Freiminuten jeden Monat
- 0 € Anmeldegebühr
- 30 Minuten Startguthaben

Über 800 Fahrzeuge



- 20 Freiminuten jeden Monat
- 0 € Anmeldegebühr
- 30 Minuten Startguthaben
- Mit der switchh Card öffnen

Über 550 Fahrzeuge



- 0 € Anmeldegebühr
- 15 € Startguthaben
- Mit der switchh Card öffnen

Über 130 Fahrzeuge

CARSHARING AND THE MaaS-SYSTEM

Understanding CarSharing



Free-floating



Round-trip

CARSHARING AND THE MaaS-SYSTEM

Understanding CarSharing



Inner city trip, one way

(30 minutes, 8 kilometers)

7,20 €

9,30 €

not possible

Countryside trip on a Sunday

(8 hours, 120 kilometers)

79,- €

79,- €

41,20 €

CARSHARING AND THE MaaS-SYSTEM

The future: Providing solutions

Free-floating



Good for:

- short inner city trips
- last mile

Value:

- no planning ahead needed
- one-way trips possible

Round-trip



Good for:

- transport
- out of town trips
- business

Value:

- cheap
- reservations possible

CARSHARING AND THE MaaS-SYSTEM

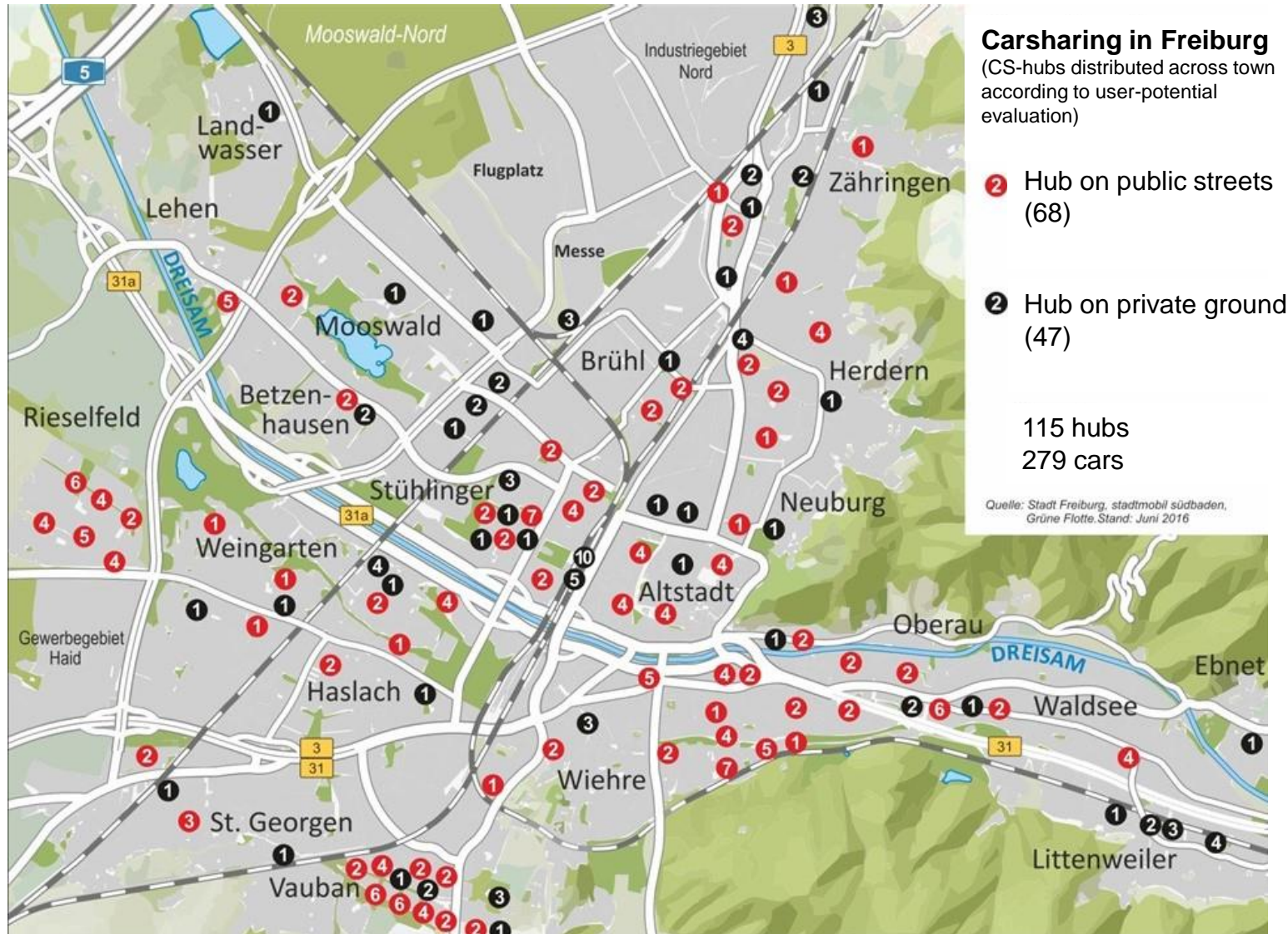
Combined carsharing-systems



520 roundtrip cars \longrightarrow combined rate \longleftarrow 300 free-floating cars

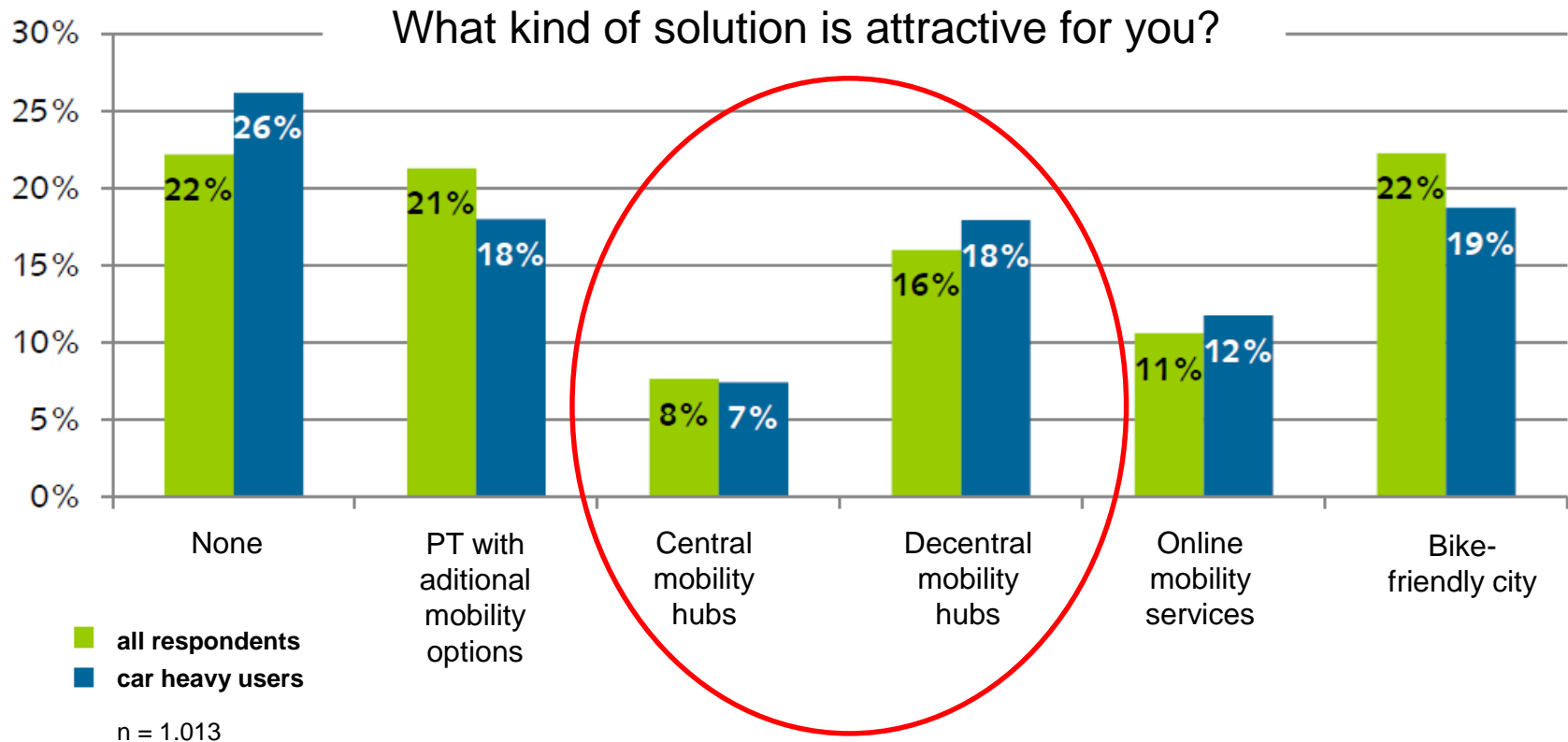
CARSHARING AND THE MaaS-SYSTEM

Physical infrastructure has to meet value proposition



MOBILITY AS A SERVICE

The customer perspective



CARSHARING AND THE MaaS-SYSTEM

Learnings

- Understand how the carsharing services really function
- Make the value of different services visible
- Develop the physical system
- Cooperate and learn

**THANK YOU FOR YOUR
ATTENTION!**

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