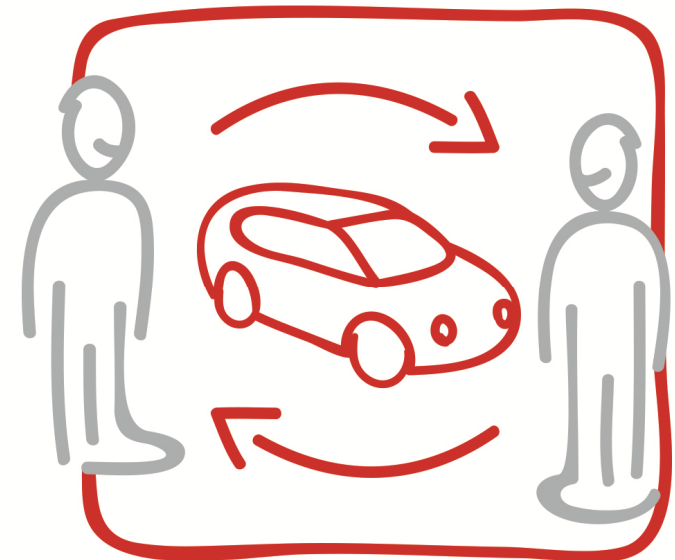


GLOBAL CARSHARING OPERATOR SURVEY

1. GLOBAL CARSHARING OPERATOR DATABASE
2. OPERATOR SURVEY
3. INTERNATIONAL DEVELOPMENT TRENDS

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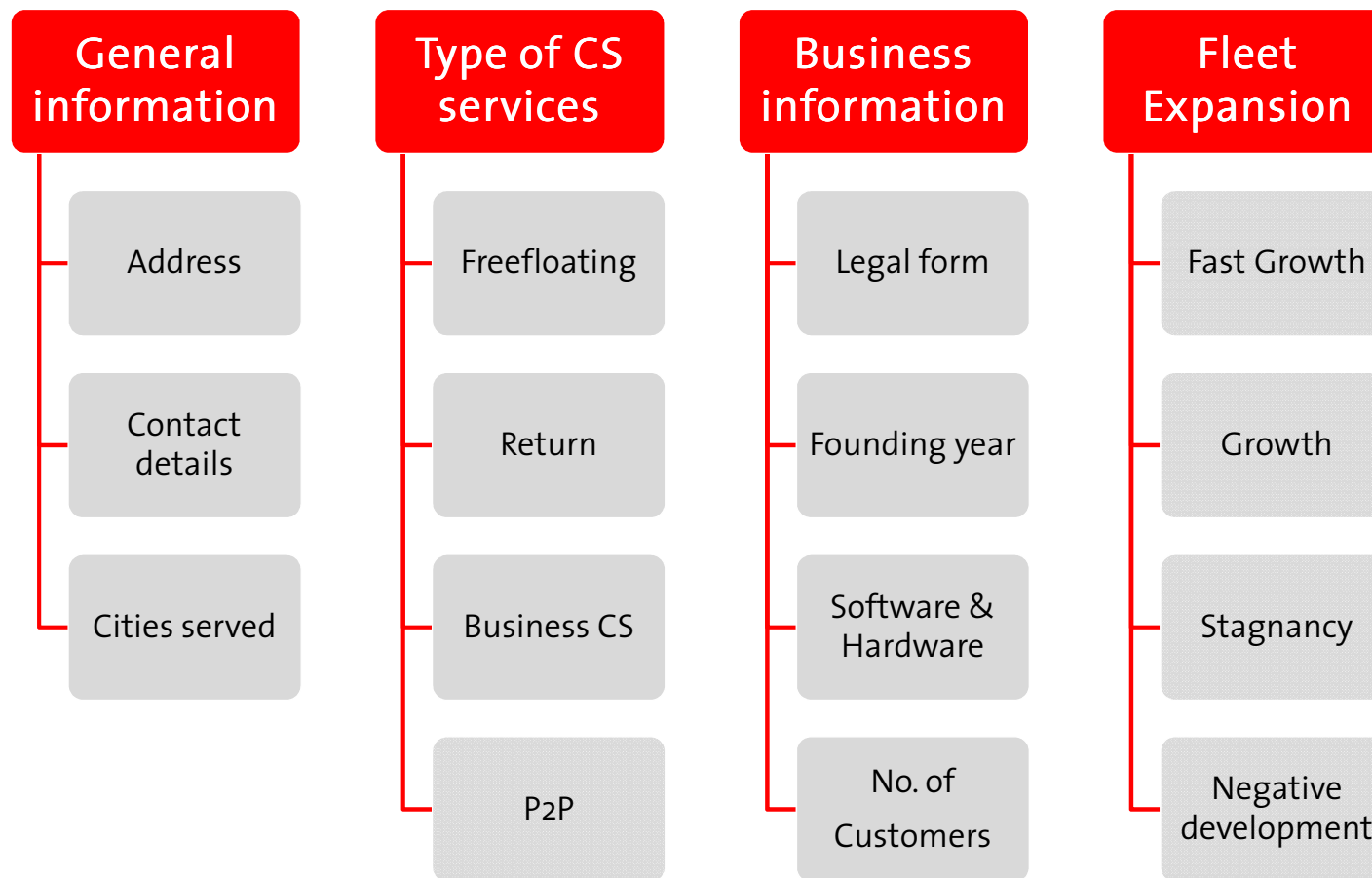


▶ SURVEY

GLOBAL CARSHARING OPERATOR DATABASE

INTERNATIONAL DEVELOPMENT TRENDS

- 345 CS Operators from 30 countries around the globe
- Research started February 2014
- Continuously updated by desk research and online survey



► DATABASE

SURVEY

TRENDS

Features

- Invited: **253 out of 345 CS Operators**
 - email not available with some companies or only online form to contact
- 2 waves in 2014, each active for 14 days
- Available in 4 languages: DE, EN, ES, FR

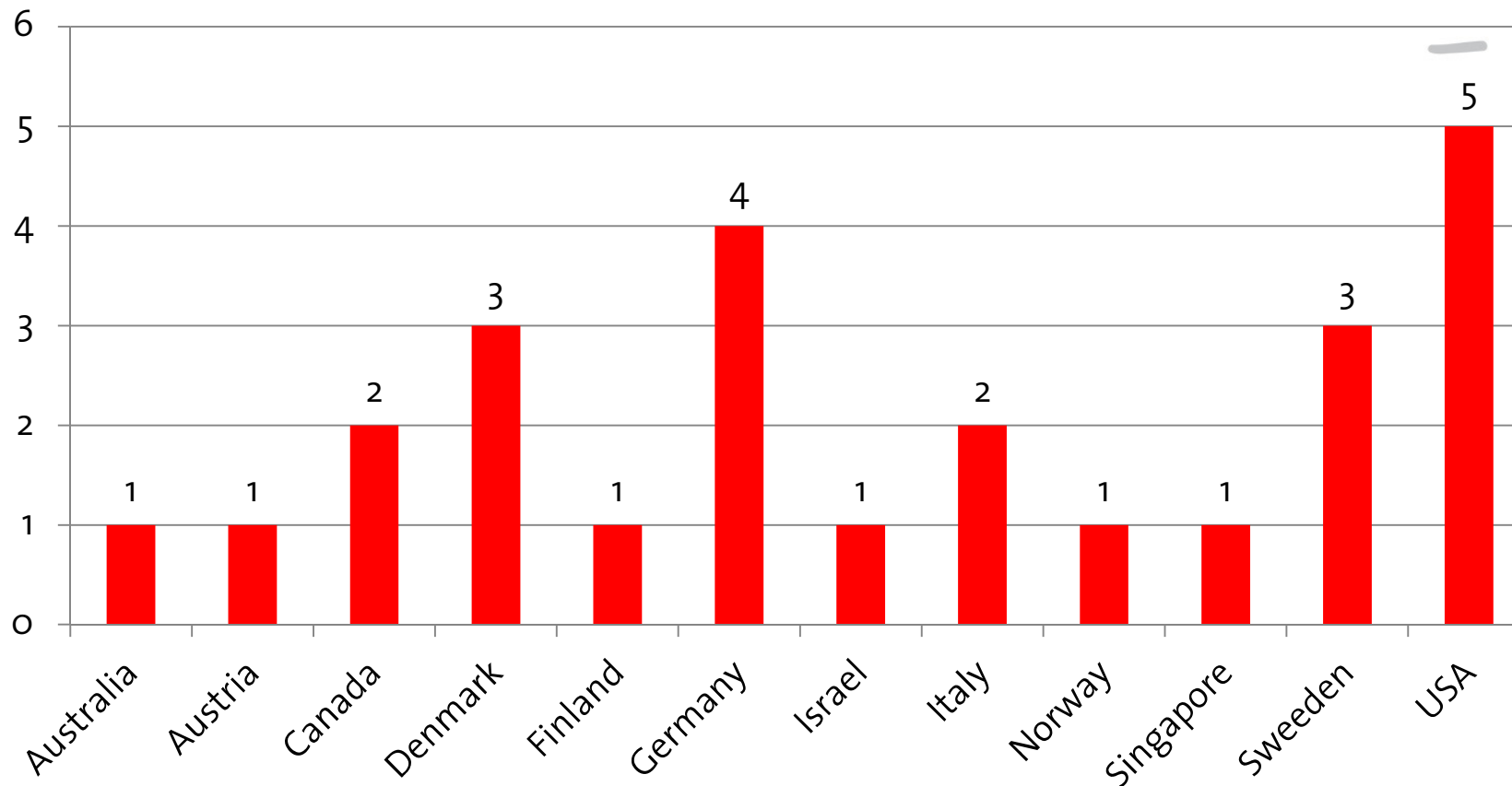
Purposes of the survey

- Confirm data from desk research
- Obtain additional information
 - company's growth in the past years and expected trends
 - operators' opinion on barriers for extending CS services



Survey participation: ~ 10% (25 replies)

Distribution per country:



DATABASE

► SURVEY

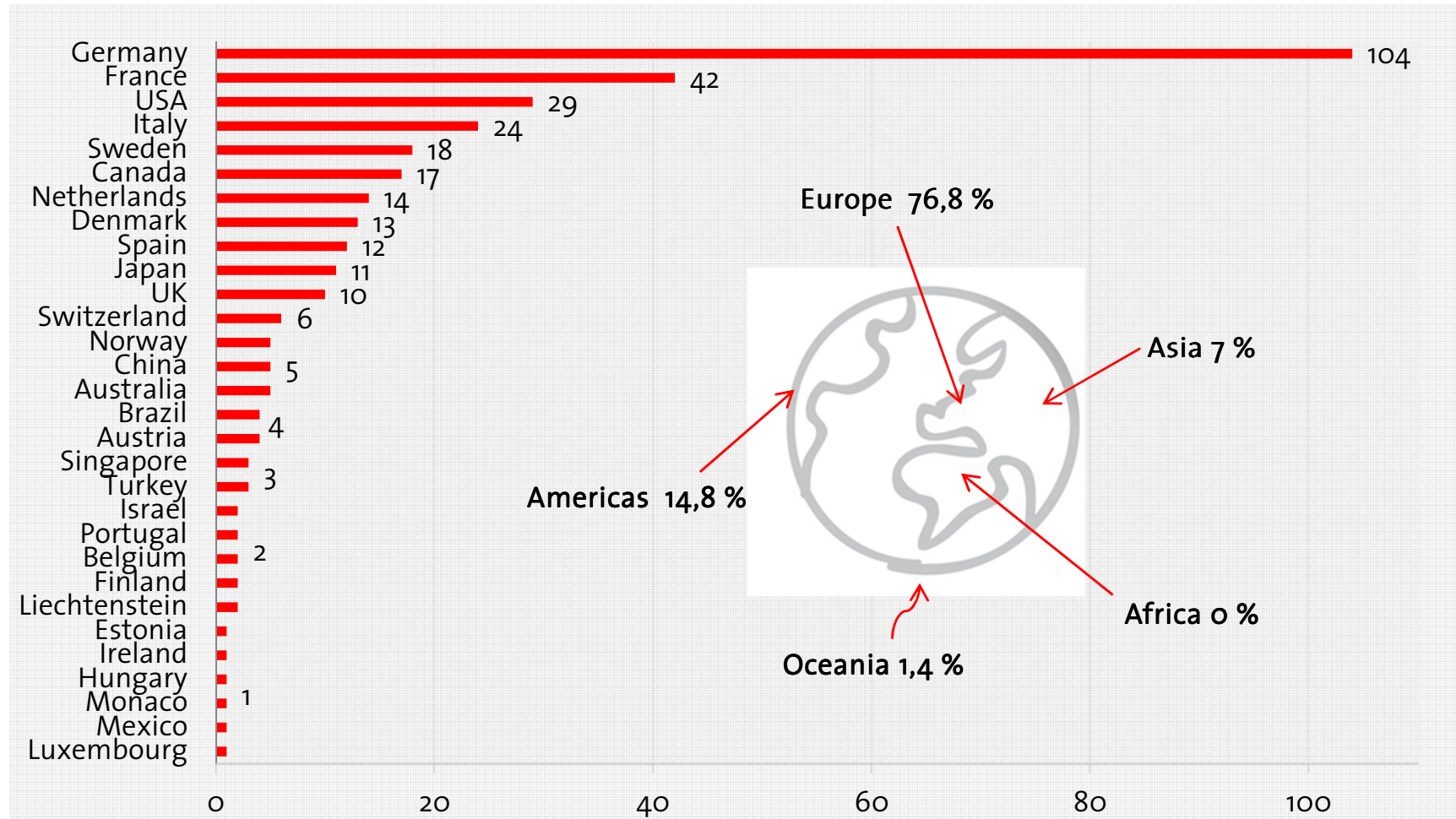
TRENDS

SURVEY

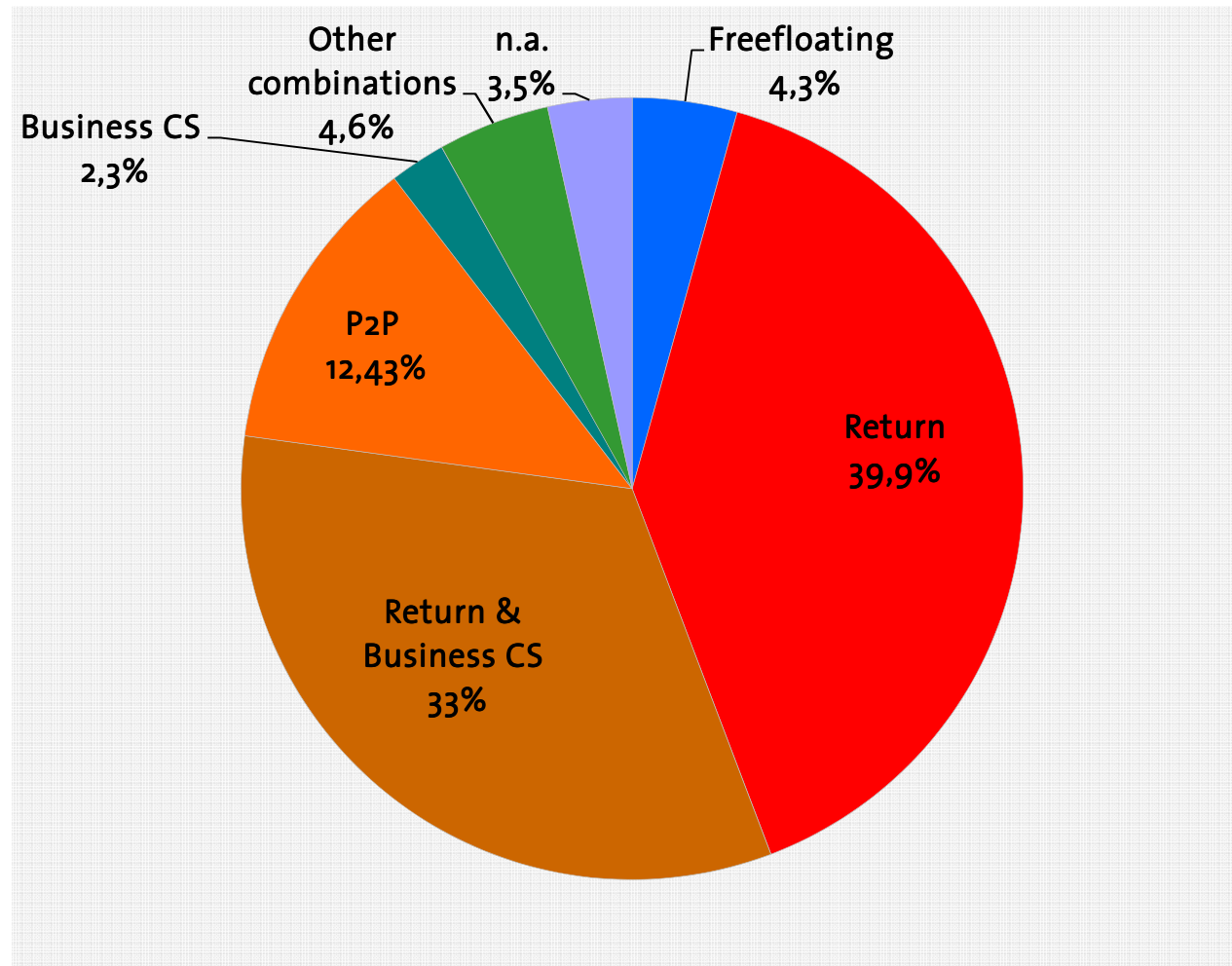
▶ GLOBAL CARSHARING OPERATOR DATABASE

INTERNATIONAL DEVELOPMENT TRENDS

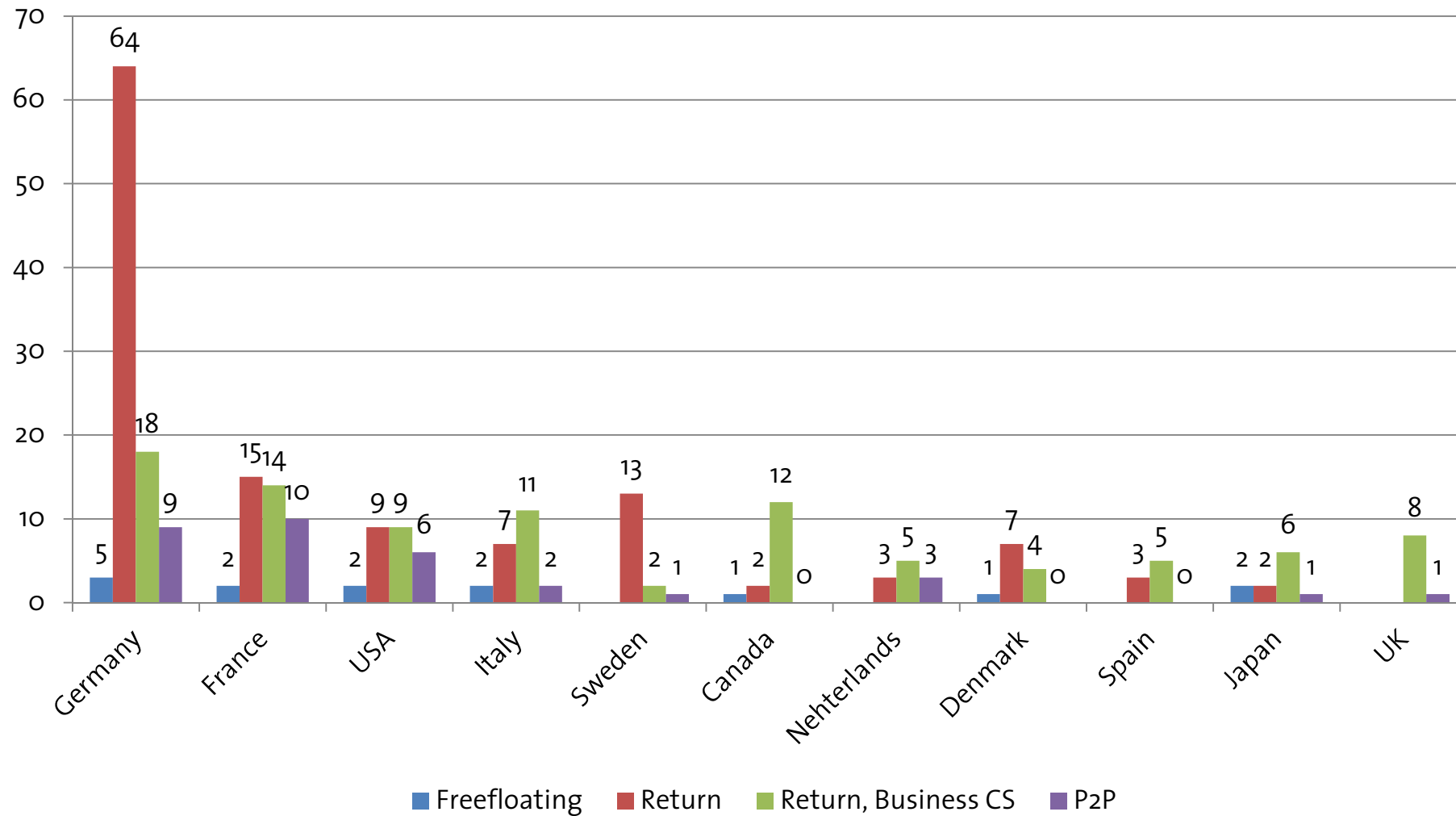
Number of CS Operators per country



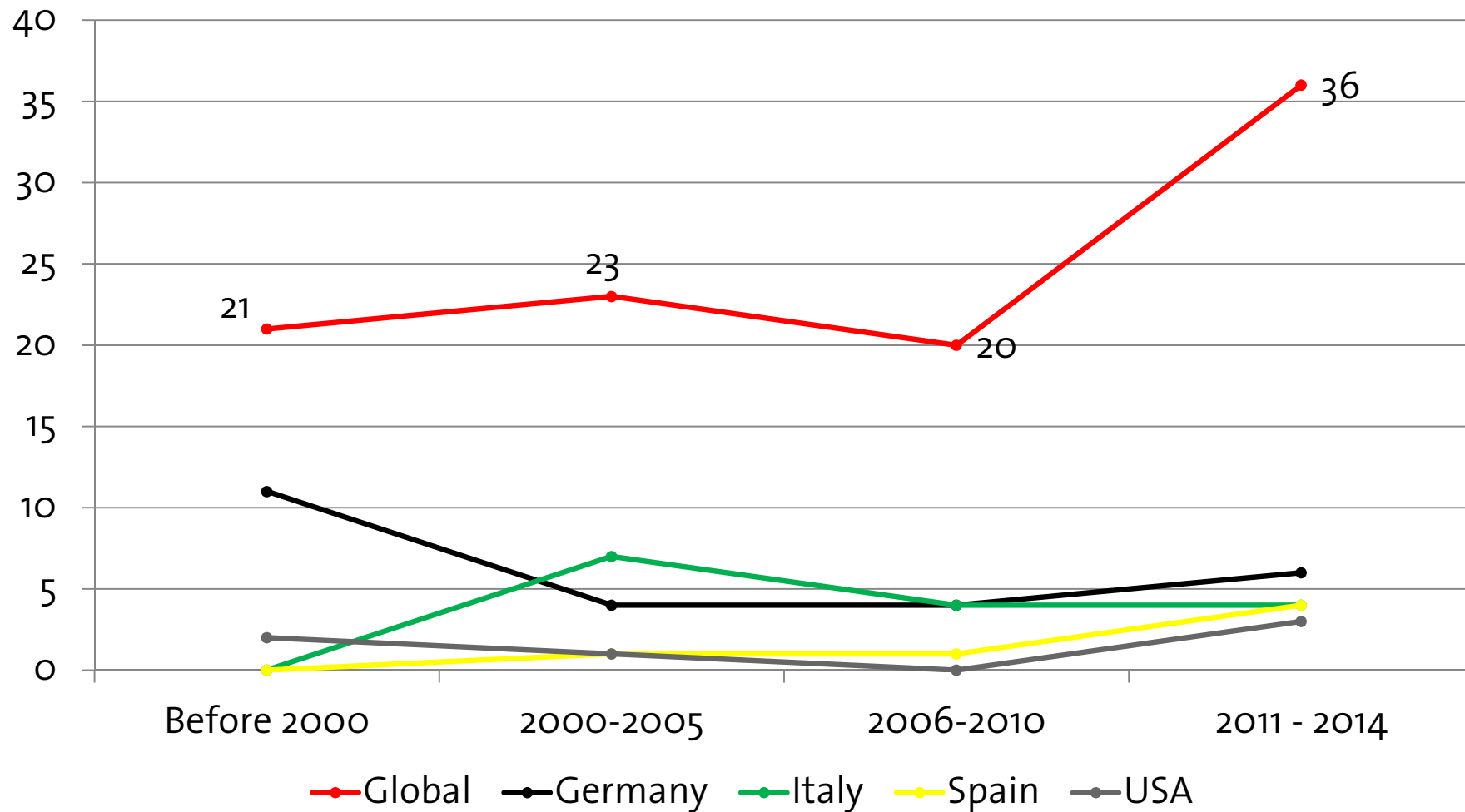
Distribution of type of CS services among operators



Type of services in countries with 10 or more operators



Year of foundation available for 100 operators (29 %)



Number of customer
Information available for
66 operators (19 %)

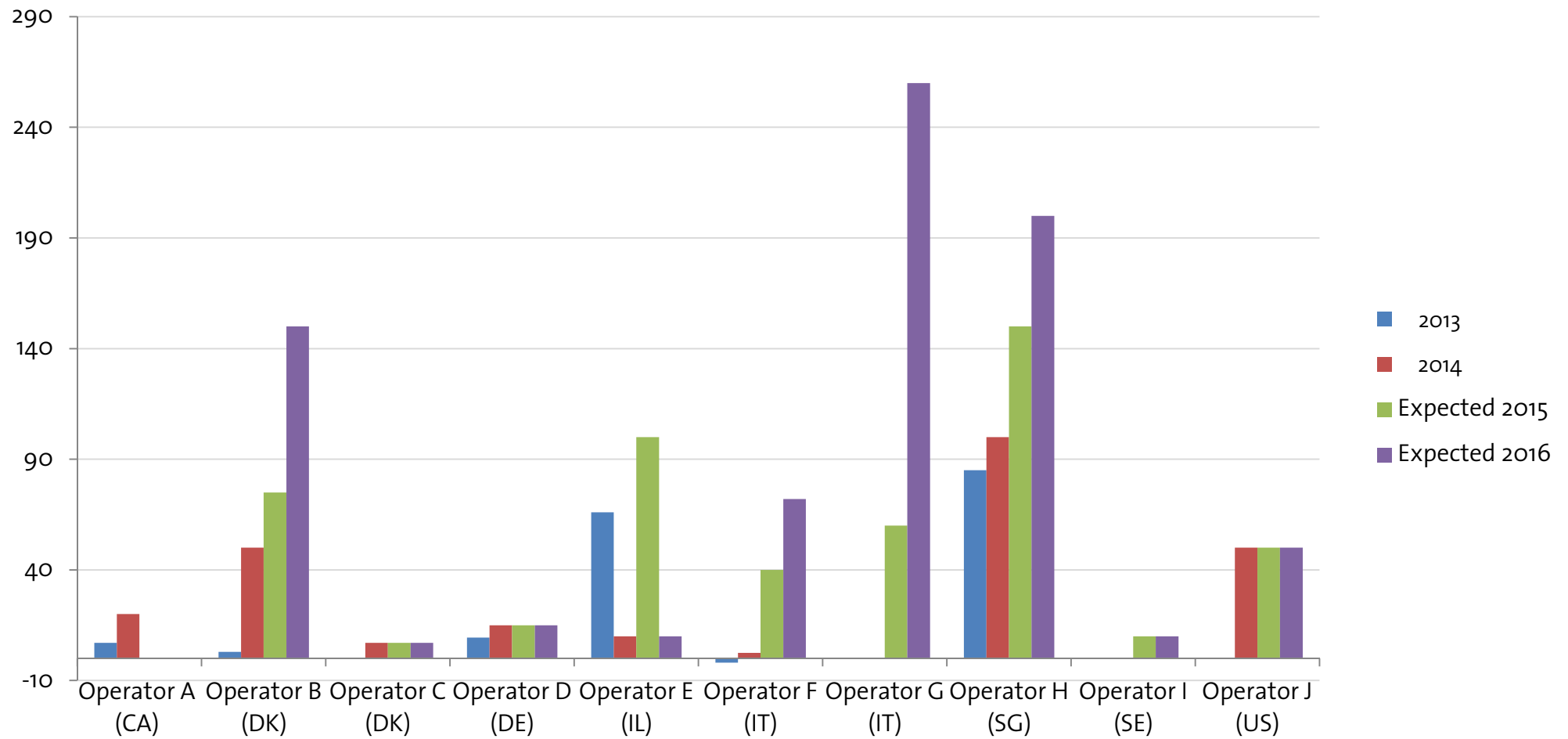
66 operators serve
1.887.800 customers



Number of cars
Information available for
136 operators (39 %)

136 operators provide
61.140 cars

Growth facts and expectations for a selection of CS operators



What are the dominating barriers for extending Car Sharing services?

CANADA:

- *Citizens' not understanding of the financial benefits*
- ***Lack of partnerships with municipalities***
- *Advertising constraints*
- *Private vehicle ownership*

DENMARK:

- *Difficulty to spread local knowledge on the individual and environmental benefits*
- *Finances*
- *Limited expansion possibilities due to **shortage of resources** (non-profit organizations)*

FINLAND:

- ***Non-readiness of insurance law*** and companies to develop a model for P2P CS
- *Difficulty in calculating fixed and variable cost of car ownership*

ISRAEL:

- *Agreements with councils for **on-street parking***

What are the dominating barriers for extending Car Sharing services?

SWEDEN:

- *Consumer acceptance*
- *Low acceptance of sharing economy*
- *Lack of free floating parking*
- *Lack of information through the media*
- *Unclear definition of some systems*
- *Lack of resources of non-profit models, which make them unsuccessful for the long term*

Norway:

- *Parking areas*

ITALY:

- *Easy availability of cars*

USA:

- *Strong competition with car ownership*
- *Need of improvement of transit and bike facilities*
- *Capital for expansion*
- *Insurance availability and open standards for connected cars*
- *Convincing potential customers to give up their car*

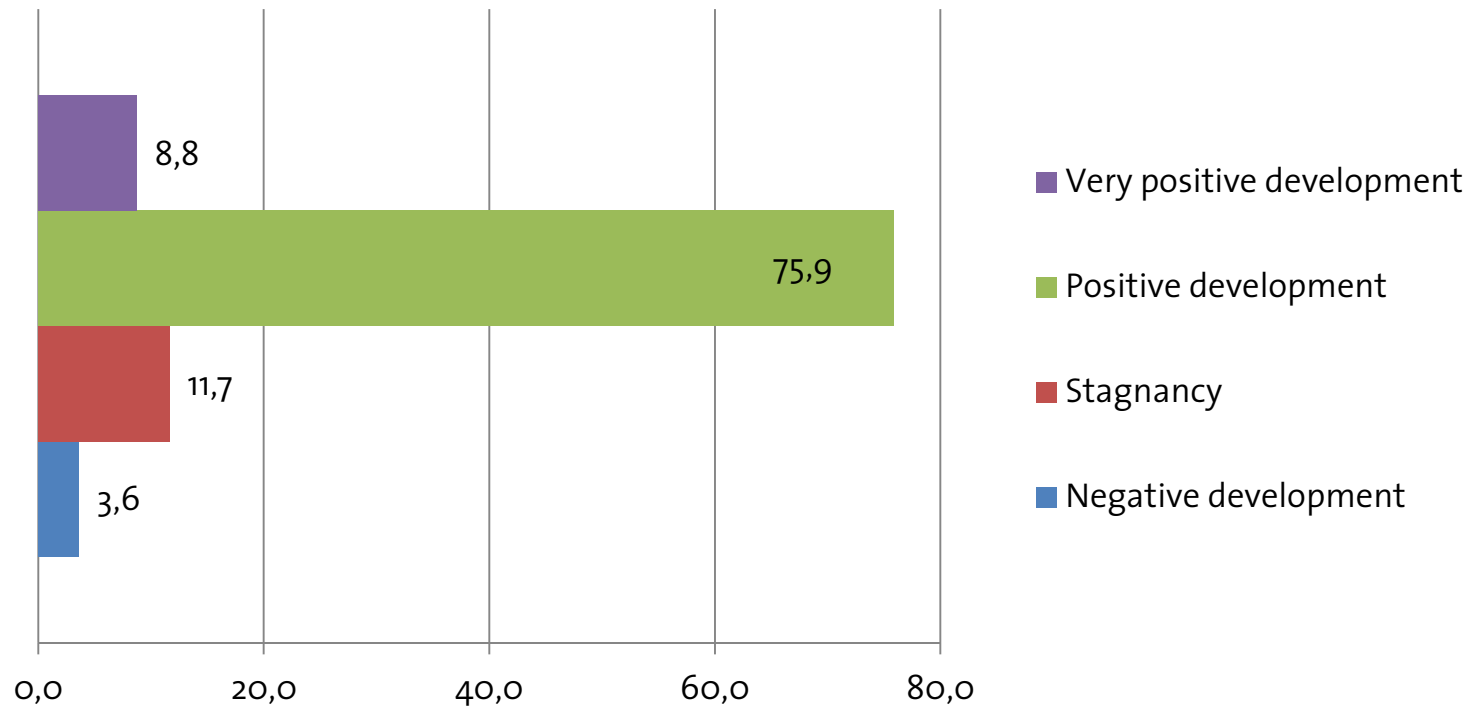
SINGAPORE:

- *Consumer acceptance*

GLOBAL CARSHARING OPERATOR DATABASE OPERATOR SURVEY

▶ INTERNATIONAL DEVELOPMENT TRENDS

Development trends of 138 CS operators (40 %)



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DATABASE

SURVEY

▶ TRENDS

Thank you!

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