Fleet sharing between NGOs: How to make it happen?
# Changing Urban Demographics

<table>
<thead>
<tr>
<th>Factors</th>
<th>Impact To Mobility</th>
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</table>
| **Urbanisation** | • More concentrated density  
|  • Over 54% of the World’s population lives in cities, expected to rise to 67% by 2050; urbanisation exceeds 80% in OECD countries |  • Limited space  
|  |  • Increased mobility demand  
|  |  • Unbalanced Supply & Demand |
| **Travel Problems** | • Unproductive time spend  
|  • Drivers spend 50 hours per year in congestion which stifles the economy of 1% of GDP  
|  • 7 million lives are lost prematurely each year due to air quality; mobility is the largest sector contributor |  • Inconvenience & high costs  
|  |  • Opportunity for innovation in new mobility services |
| **Insufficient Solutions** | • Inconsistent Transport Provisions  
|  • Private cars are utilised 4% of the time and account for 29% of transport trips on average, but account for 85% of our mobility expenditure |  • Multiple apps & fragmented markets with several providers  
|  |  • Fixed, inflexible routes  
|  |  • Lack of information, integration & user experience |

Global transportation market needs new type of mobility services.

*Sources: World Bank, World Health Organisation, Inrix, European Commission, Eurostat*
Paradigm Shift from Vehicle Ownership to Vehicle Usage

Transport = Private Vehicle
- Freedom
- Convenience
- Status
- Progress
- No Real Alternative

Mobility Integration: Paradigm Shift from Vehicle Ownership to Vehicle Usage
- Population Growth
- Connectivity
- Pollution
- Automation
- Natural Resources
- Social Responsibility
- Virtualization
- Urbanization
- Gen Y
- Congestion
- Pollution
- Natural Resources

Transport = Door-to-door Mobility
- New Vehicles: BRT, EV, High Speed Rail
- New Business Models: Vehicle Sharing, Car Pooling
- Inter- Connectivity: Inter-modality
- Urban Planning: Transport Integration
- Integrated Mobility: Mu, Multicity, NS Business Card, Mobility Mixx, Avego
Market Trends in Traditional Carsharing

Revenue from the global carsharing market is expected to grow at a CAGR of 15% to around $8 bn in 2025 from the current $3 bn in 2017.

2017 Global Members

- Africa
- APAC
- Latin America
- North America
- Europe

~ 22 Mn

CAGR (2017–2025) ~ 8%

2025 Global Members

- Africa
- APAC
- Latin America
- North America
- Europe

~ 47 Mn

Carsharing Market: Number of Vehicles, Global, 2017 and 2025

- 2017: 236K
- 2025: 525K

Note: All figures are rounded. The base year is 2017. Source: Frost & Sullivan
Market Trends in P2P Carsharing

### 2017 vs 2025

**Members**
- 2017: 16 million
- 2025: 31 million

**Fleet Size**
- 2017: 741k
- 2025: 1.7 Mn

**Revenue**
- 2017: ~$ 1.2 bn
- 2025: ~$ 3.4 bn

**Services and Business Models**
- Significant Increase

### Expansion of Value Chain

- Getaround
- Ford
- Toyota
- Athlon
- SnappCar
- Leasing Companies
- Used Car Sales
- Individuals
- Ridehailing Operators
- Participants

Source: Frost & Sullivan
Four Possible Future States

1. Incremental Change
2. A World of Carsharing
3. The Driverless Revolution
4. A New Age of Accessible Autonomy
Four Possible Future States

Vehicle ownership

- Own vehicles. Maintain flexibility, security and convenience
- Ridesharing and carsharing among agencies. No ownership

Vehicle control

- Operate autonomous vehicles, no need to hire drivers
- Operate autonomous vehicles, no need to hire drivers

Driver

- Retain drivers. Use driver-assist technology to limit safety risks
- Retain drivers. Use driver-assist technology to limit safety risks

Personal

Shared
Believer?  Non believer?
What is fleet sharing?
What are benefits / pros of fleet sharing?
What are downsides / cons of fleet sharing?
What are the risks if you do not do it?
What are the risks if you do do it?
What are limitations/barriers in implementation?
What mitigating activities can we execute?
What actions need to be taken?

- Stakeholders
- Business case
- Implementation
Are we ready to start working on it?