

INVERS

INVERS Mobility Barometer

**Vol 3: European
Station-Based Carsharing**

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1

Intro

**Getting started with
definitions and scope**

Introducing the Mobility Barometer

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

In pursuit of fostering market insights and industry expertise, the INVERS Mobility Barometer offers a curated selection of research findings from related industries and knowledge shared by market experts and practitioners.

Our Barometer is available at no cost, and explores a wide spectrum of new mobility services. We are thrilled to present the findings of the European station-based carsharing market in our third edition. Our previous editions explored the [European free-floating carsharing market](#) and the [European car subscription market](#).

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



At a glance

Key report numbers

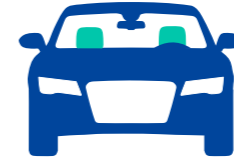
4

Expert interviews



8

Featured studies



55K

Vehicles identified



20+

European countries with station-based fleets



400+

European station-based carsharing operators



5

Trends explored

Purpose and objectives

How this study can help

Purpose:

The objective of this INVERS barometer is to facilitate a rapid and comprehensive understanding of pivotal market dynamics, insights, and trends, catering not only to stakeholders in the carsharing industry but also to a wider audience.

Method:

This publication leverages existing industry knowledge and enriches it with fresh insights obtained through in-depth industry interviews and an analysis of the current market landscape. It's important to note that the data presented in this report may not necessarily reflect the entirety of the industry; rather, they serve as a valuable introductory snapshot of the market.



Key elements of our Barometer

Highlighting the European station-based carsharing market



Meta study

We **highlighted selected external reports** and listed some external research findings. By doing so, we provided a fast track to existing research findings.



Interviews

Additionally, we interviewed **four carsharing experts** about their experience and key insights.

Experts from...

- France
- Spain
- Switzerland
- the UK



Operator analysis

We analyzed the majority of **available station-based carsharing services in Europe by means of a desktop study.**



Station-based carsharing explained

Setting the stage

Station-based carsharing is a type of car rental service where customers can reserve, pickup and return a car usually to the same location or parking spot rather than to another location within a larger designated service area (in contrast to the free-floating carsharing model). Some concepts use small “home zones” instead of actual parking spaces.

Unlike traditional car rentals, users register as members of the carsharing service then access vehicles through apps, keycards, or key safes, ensuring flexibility and 24/7 availability. The typical trip duration is often longer than free-floating but shorter than traditional rental.

Station-based carsharing is also often referred to as roundtrip carsharing, or sometimes classic carsharing. All terms refer to the same broader business model, that we call station-based carsharing in this report.

Selected product characteristics

Typical characteristics and features of station-based carsharing services



Round-trips

Pickup and drop-off typically at the same location



No manual key handover

Access to car often via an app, key card or a key lock-box



Pre-defined reservation windows

Often with option to extend if needed



Hassle-free

Tax, repair, insurance, etc. included



24/7 access

Pickup and drop-off typically possible at any time

Blurring the boundaries

An increasing number of operators apply multiple business models

There's an ongoing convergence of traditionally distinct carsharing models. The lines between various carsharing paradigms, such as free-floating, station-based, peer-to-peer, and, in some cases, car subscription and automated rentals, are becoming increasingly blurred. More and more operators are now also incorporating combinations of these models into their service offerings.

Here are some noteworthy industry examples:

- Some formerly station-based-only providers have embraced “combined systems” (see e.g. bcs 2023)
- Share Now, originally focused on free-floating, runs station-based carsharing in Münster (Germany).
- Bolt Drive, a ridesharing and kick scooter sharing provider, has entered the carsharing sector.
- SIXT Share strategically leverages synergies with its classic rental business.



2

Market Overview

Top-level market insights



Europe has pioneered carsharing for decades

Station-based carsharing has a long history and continues to grow in popularity

Carsharing has been increasingly implemented since the 1980s on and has been gaining traction since then. The station-based carsharing business model has been a key driver of the carsharing industry since then.

At the end of 2021, the market analysts at Berg Insight estimated a global carsharing vehicle fleet size of more than 500,000 cars (Berg Insight 2022).

Station-based services can be found not only in major cities, but also “in smaller cities and towns, as smaller user bases are enough for smaller fleets concentrated at selected locations” (Friedel 2021).

Fluctuo’s latest annual report (Q2 2023) shows that carsharing fleets in Europe have grown by 6% since last year, and ridership has grown by 14% during that time (Fluctuo 2023).

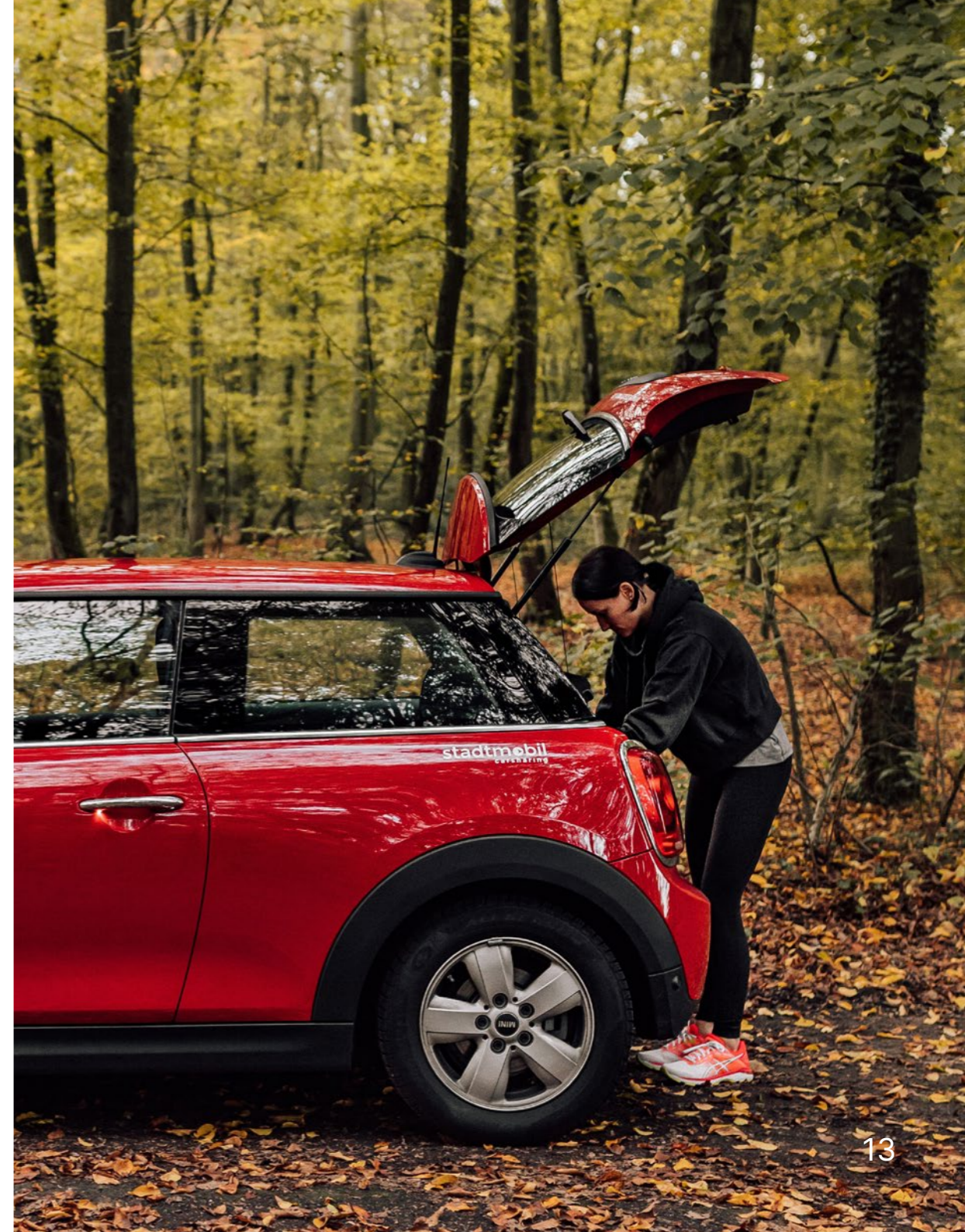
Current total fleet size in Europe includes at least 55,000 cars

Station-based carsharing is widespread throughout Europe

55,000+ vehicles

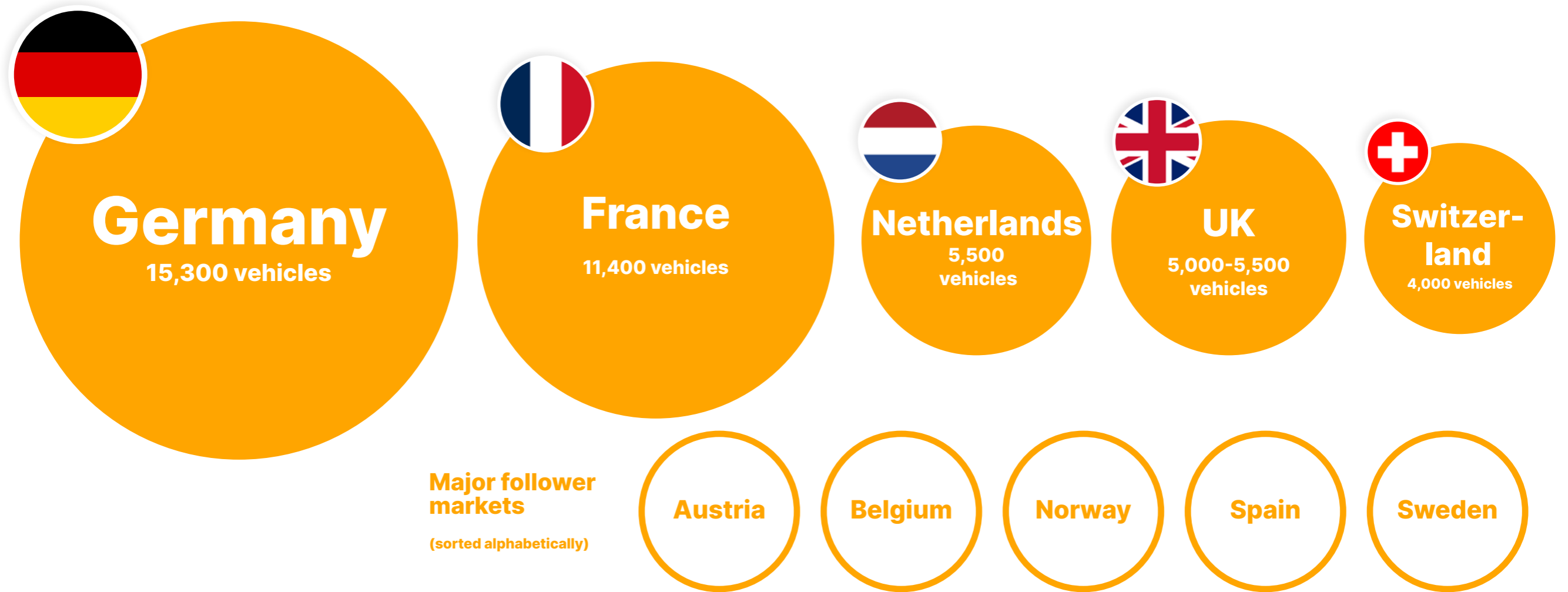
Estimated market size in Europe
Data as of Q2 2023

Info: The 55,000+ European station-based cars are an estimate based on publicly available national and individual fleet size statistics and desktop research.



Top 5 European station-based carsharing markets

Germany is the largest individual European national market, followed by France



Sources: Desktop study + Germany (bcs 2023), France (AAA 2023), Netherlands (CROW-KpVV 2023), UK (base value of overall carsharing market from CoMoUK 2023 combined with own estimate), Switzerland (CHACOMO 2023)

Selected major national station-based carsharing operators and platforms



Info: In most countries, the listed operators are examples of nationally active operators (as of Q2 2023) and do not necessarily represent the full national market.

Fleet electrification

Carsharing electrification rate is usually higher than in non-carsharing private vehicle fleets

The ongoing electrification of station-based carsharing fleets reflects a push by operators to increase the prevalence of electric vehicles (EVs). National carsharing reports consistently show that in major markets, station-based carsharing fleets, or combined station-based/free-floating fleets, where data is available, have notably higher electrification rates than private vehicles. Carsharing is playing a key role in boosting overall national EV adoption.

20%
Germany
(station-based + free-floating 2023)

60%
Italy
(station-based carsharing 2023)

14%
UK
(station-based + free-floating 2023)

30%
Netherlands
(station-based carsharing 2022)

Standard passenger cars dominate

But additional vehicle types like transporters and microcars are on the rise

In our analysis, we've identified a wide range of passenger car types suitable for various use cases. Notably, there's been a growing trend among operators in recent years to introduce specialized vehicles, including transporters and microcars.



Reading tip: Good aggregated data on vehicle classes in carsharing in the Dutch market can be found at CROW-KpVV (2023b).



Standard passenger cars



Transporters



Microcars



Many more...

3

Meta Study

Key insights and takeaways from other studies



Approach

How and why we conducted the meta study

We curated and aggregated a selection of external industry reports, creating shortcuts to access valuable research results.

We chose the reports to study based on:

- Relevance to station-based carsharing
- Emphasis on major insights
- A primary focus on European context
- Relying on operator-independent findings provided by national carsharing associations

As a result, we've spotlighted eight publications, each of which brings its own industry insider-knowledge and unique data research methodologies.

Within our analysis, we delve deeper into five of these publications, sharing key findings in our comprehensive examination on pages 21-30. Notably, these five publications also offer insights into the top 5 European station-based carsharing markets, providing readers with an opportunity to explore the heart of the European carsharing landscape.

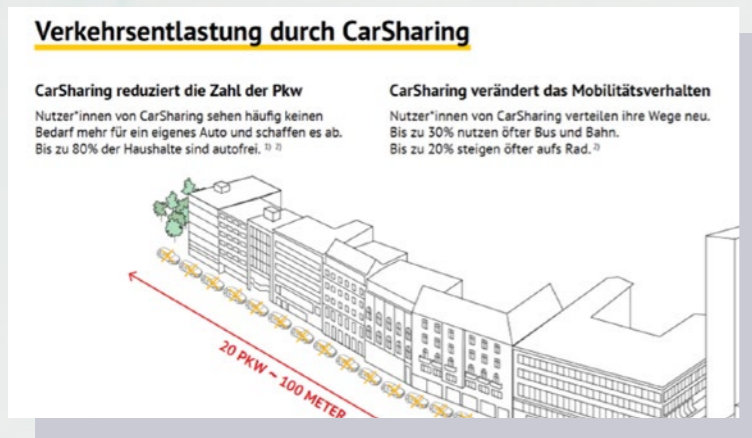
Some reports we found useful

deep dive studies

Publisher	Year	Title	Why read it?	
Bundesverband CarSharing e.V. (bcs)	2023	<u>Aktuelle Zahlen und Fakten zum CarSharing in Deutschland. (German)</u>	Germany is the biggest European carsharing market. The bcs publishes aggregated carsharing statistics for free-floating and station-based carsharing once a year. Trends: Fleet size and customer numbers are growing.	pp. 21-22
L'Association des Acteurs de l'Autopartage	2023	<u>Barometre National Autopartage 2023. (French)</u>	An extensive compendium of the entire free-floating and station-based carsharing market in France. Very data-driven annual publication that aggregates all individual operator data.	pp. 23-24
CROW-KpVV	2023	<u>Dashboard Autodelen 2023. (Dutch)</u>	Customizable, digital dashboard of the Dutch carsharing market. Info on changes over time and across regions. Beyond the dashboard, many online articles with additional insights and statistics.	pp. 25-26
CoMoUK	2023	<u>CoMoUK. Annual Car Club Report 2022. UK.</u>	CoMoUK annually publishes a brief but fundamental national „Car Club Report“ focusing on metrics such as fleet size, customer base, electrification rate, fuel type and other metrics for all carsharing modes combined.	pp. 27-28
CHACOMO	2023	<u>Zahlen und Fakten zum Shared Mobility Markt Schweiz. (German/French)</u>	CHACOMO runs a great website dashboard updating key insights and statistics into all shared mobility modes twice a year. The statistics are based on thorough research and in cooperation with many operators.	pp. 29-30
Autodelen.net	2022	<u>Impact Report. Car Sharing in Belgium 2022</u>	Great overview of the status and development of the Belgian market. Includes insights on car trips replaced, impact on travel behavior, a user survey among active carsharing users, many KPIs and user insights.	
Nansubuga et al.	2021	<u>Carsharing: a systematic literature review and research agenda</u>	The only academic paper on this list provides a great overview of existing academic research in the field of carsharing, including a wide variety of business models. Selected topics: Business models, drivers/barriers, vehicle balancing, etc.	
Osservatorio Nazionale Sharing Mobility	2023	<u>7° Rapporto Nazionale Sulla Sharing Mobility (Italian)</u>	Very extensive and neutral coverage of the entire Italian shared mobility landscape (car, bike, moped, kick scooter). The report lists detailed trends, statistics and KPIs.	

Deep-dive 1: German market (bcs)

The biggest European carsharing market (station-based and free-floating alike)



**Bundesverband
CarSharing e.V. (bcs)**
CarSharing in Deutschland.
Fact Sheet.

Year: 2023

[carsharing.de](https://www.carsharing.de)

About

The bcs was founded in 1998 and is the national carsharing association of the largest European carsharing market - Germany. Its membership includes 205 carsharing operators and it publishes its carsharing statistics annually, showcasing the size and development of the national market.

Carsharing is available in more than 1,000 German municipalities and cities, offered by almost 250 operators. With their analytical publications, the bcs helps to understand the very complex German carsharing market.

Why read this report?

- **Full focus on Germany, a key European market**
- **Includes station-based and free-floating carsharing info**
- **Outstanding additional data publications and resources**

Deep-dive 1: Insights from the German market (bcs)

The biggest European carsharing market (free-floating and station-based alike)

15,300

Station-based vehicles

Of which 1,300 are vehicles in combined/hybrid systems

20.5%

Share of electric cars in German carsharing fleets overall

Carsharing is 6x more electric than the overall German car fleet

1,000

Cities have station-based services

Compared to more than 34 municipalities with free-floating systems. Station-based carsharing has fewer cars than free-floating in total but is also more frequently available in smaller towns and cities.

900,000+

Registered station-based carsharing users

Includes station-based and some mixed-service users. Another 3.5 million are registered for free-floating carsharing

240+

Station-based operators

The vast majority of German carsharing providers focus on station-based services. A few very large providers offer free-floating services.

#1

Biggest European carsharing market

Germany represents the largest European station-based carsharing market

Deep-dive 2: French market (AAA)

Lessons from Paris, Lyon and beyond



L'Association des Acteurs de l'Autopartage (AAA)
Baromètre National
Autopartage 2023

Year: 2023

asso-autopartage.fr

About

AAA is the French carsharing association whose members represent almost the entire carsharing market in France. Their annual report focuses on station-based and free-floating carsharing.

Once a year, AAA publishes the national carsharing barometer of France. The insights include fleet size, fleet compositions, user base, emissions, regional distribution, and more.

Why read this report?

- **Access all relevant carsharing data from France**
- **Explore insights on free-floating and station-based carsharing**
- **Updated annually to provide the latest data**
- **A valuable data compendium offering key metrics such as fleet size, registered users, fleet density, emissions, and other essential KPIs**

Deep-dive 2: Insights from the French market (AAA)

Lessons from Paris, Lyon and beyond

11,400

Station-based carsharing vehicles
Compared to 2,100 free-floating vehicles

360K

Unique users
Large customer base

32

Unique users per station-based car
Compared to 47 unique users per free-floating car

6,800

Carsharing stations
Across France

2

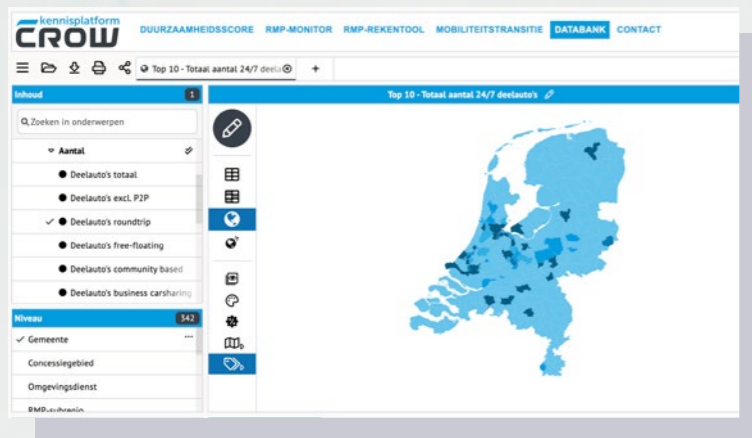
Station-based cars per station
On average

22

Different operators
From diverse backgrounds

Deep-dive 3: Dutch market (CROW-KpVV)

One of the European leaders in per-capita availability for station-based carsharing



CROW-KpVV
Dashboard Autodelen 2023

Year: 2023

crow.nl & [Dashboard](#)

About

CROW-KpVV publishes annual statistics on the development and status of the Dutch carsharing market. The customizable online digital dashboards and online articles analyze and visualize fleet sizes, regional distribution, engine types, and business models of Dutch carsharing operators.

Why read this report?

- **Get a comprehensive perspective on the Dutch carsharing market**
- **Interact with digital dashboards for an engaging and customizable experience**
- **Stay up to date with yearly updates that deliver the latest data and trends**

Deep-dive 3: Insights from the Dutch market (CROW-KpVV)

One of the European leaders in per-capita availability for station-based carsharing

5,500

Station-based carsharing vehicles

Definition by CROW-KpVV includes “station-based” and “homezone” vehicles

Top 3

Cities for carsharing in NL are Amsterdam, Utrecht and Rotterdam

Services available in many more cities across country

30 %

Approx. electrification rate in 2022

In station-based carsharing. Comparison: only 3,4% of the private cars in the Netherlands are fully electric (CROW-KpVV 2022)

95%

Of people in Amsterdam can rent a carsharing car within 5 mins

Widespread availability in large cities

>3.5x

Bigger market than free-floating carsharing

Station-based carsharing in the Netherlands has considerably more cars than free-floating services

3x

The fleet size compared to 2017

Station-based more than tripled in six years

Deep-dive 4: UK market (CoMoUK)

The land of car clubs



CoMoUK
CoMoUK Annual Car Club Report
2022. UK

Year: 2023

comouk.org.uk

About

CoMoUK is the UK organization for shared transport. They cover services that share cars, bikes and e-bikes, rides in cars, e-scooters and Digital Demand Responsive Transport services (DDRT). Their carsharing reports are highly detailed and are among the top European industry reports in the space. They also organize the Annual Shared Transport Conference.

Why read this report?

- **A dedicated focus on the United Kingdom's carsharing landscape.**
- **Features an online survey with a wealth of additional insights covering use cases, usage patterns, demographics, and more.**
- **Refreshed once a year to offer the latest information and trends.**

Deep-dive 4: Insights from the UK market (CoMoUK)

The land of car clubs

5,000+

Station-based vehicles

Apart from a few free-floating carsharing cars, the majority of carsharing in UK is station-based or P2P

2/3

Of carsharing service members are younger than 39 years

Based on operator data

59%

Of trips are between 1-2 hours long

Big differences in trip length between London and the rest of the UK

14%

Of carsharing cars in UK are electric

Compared to <2% of all UK cars

750K

Carsharing members

Carsharing in the UK more than doubled since 2019

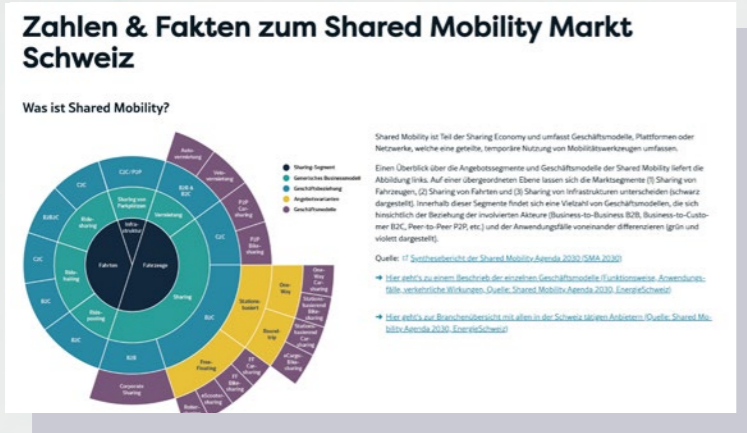
70%

Of users use the car less than 6x/year

Based on operator data

Deep-dive 5: Swiss market (CHACOMO)

High station-based carsharing vehicle density per capita



CHACOMO

Zahlen und Fakten zum Shared Mobility Markt Schweiz

Year: 2023

chacomo.ch

About

CHACOMO (Swiss Alliance for Collaborative Mobility) is the association for the shared mobility sector in Switzerland. They provide a collective voice within the political process and public debate for its more than 30 members, who account for almost 10 million shared mobility trips a year. CHACOMO regularly publishes data, insights and statistics on the development of the shared mobility industry in Switzerland, including carsharing.

Why read this report?

- **A comprehensive exploration of one of Europe's top 5 station-based carsharing markets**
- **Regularly refreshed, with updates occurring 1-2 times a year, providing the latest insights.**
- **A focused examination of Switzerland's carsharing landscape.**

Deep-dive 5: Insights from the Swiss market (CHACOMO)

High station-based carsharing vehicle density per capita

Up to **4K**
Station-based carsharing vehicles
P2P services are also available, but there are no free-floating operators

1.3M
trips annually
From evaluated carsharing providers

8,365
Carsharing stations in Switzerland
+19% compared to 2022

#1
Provider „Mobility Carsharing“ leads the market
Largest fleet size and customer base

376K
Users in all of Swiss carsharing
Mainly station-based and P2P carsharing

14
Carsharing providers in Switzerland
All business models combined (station-based, P2P, ...)

4

Interviews

**Talking to experts from
European carsharing
associations**

What do national experts have to say?

We invited some leading national carsharing associations and researchers to share their insights

This barometer edition is a joint effort from many people. External report authors, industry experts, operators, scientists and suppliers - just to name a few sources for our findings. For this section, we sat down with four industry experts.

The experts we interviewed are active in leading national carsharing associations and platforms in France, Spain, Switzerland, and the UK.

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 station-based carsharing in four of the leading European markets.





Nicolas Frasie

Co-founder & treasurer at AAA & Head of Development and Public Affairs Europe at Communauto

Association des Acteurs de l'Autopartage (AAA)

France

The French carsharing association AAA was created at the end of 2019. The association aims to promote and develop carsharing in France, giving a single voice to the entire sector. Once a year, AAA publishes the national carsharing barometer of France.

asso-autopartage.fr

Who are the main operators in the French station-based carsharing market?

The French carsharing market is still very fragmented, once you exclude platforms that also allow peer-to-peer carsharing. In January 2023, the French carsharing association AAA conducted their national carsharing barometer, revealing the presence of 22 station-based carsharing operators. 12 of them are part of the Citiz brand, who lead the French market. The market also includes initiatives from large companies: Ubeeqo owned by Europcar, Mobilize Share owned by the manufacturer Renault, and Communauto, who is the market leader in Canada.

How does station-based carsharing in France perform in comparison to free-floating and peer-to-peer services?

While several free-floating service operators shut down over the last years in France, the number of station-based carsharing services, operators, vehicles, and cities served have continued to grow. The growth of station-based carsharing services is nevertheless less dynamic than the growth of platforms enabling peer-to-peer carsharing. The sustainability of these platforms powered by startups remains to be confirmed. Regardless, the overall carsharing fleet size per inhabitant in France is almost three times smaller than in Germany. Carsharing has huge potential in France!

Can you take us through the main milestones of French station-based carsharing since its inception?

First station-based carsharing services in France appeared in the early 2000s, with Mobizen and Caisse Commune in Paris (now Communauto) and Auto'trement in Strasbourg (now Citiz Grand Est). Just like free-floating carsharing, its development was interrupted by Autolib' in Paris, and similar services in Nice, Lyon and Bordeaux. Autolib' and similar services have since completely disappeared, and round-trip carsharing could finally have access to on-street parking in these cities. Thanks to a major investment in 2022 into the Citiz network by the French leader into automobile insurance MACIF, and the announcement of a strategic partnership between Canada's Communauto and a historic operator called Modulauto, station-based carsharing is on the way to accelerate.

Can you name three special or interesting places in the French station-based car-sharing landscape?

I am thrilled by Optymo in Belfort, which is fully integrated into the public transport offer: same brand, same card, same account. 75,000 inhabitants with an Optymo card have already registered a credit or bank card to pay for bus or bike-sharing services at the

beginning of the following month, and now they just need to show their driving licenses to have access to Optymo's carsharing. In 2019, 4,432 of them used one of the 78 shared vehicles.

Clem' in Paris is also quite unique. The service is not dedicated to individuals but to small businesses. The City of Paris has provided them with 250 on-street parking spaces equipped with a charging station to offer an electric utility vehicle service. The project raises a lot of expectations in the context of low-emission zones.

But my favourite is Grenoble's "bonus for multimodal conversion", which takes up the principle of the Bruxell'Air Prime by making it as simple as the Bono Ambiental of Madrid Region. Anyone who gives up their car while it is prohibited by the low emission zone can receive a credit card with up to €1000/year for 3 years to be used for public transport, bike sharing and carsharing. This is a much-awaited signal to promote multimodality rather than car ownership!



Jonas Schmid

Director

CHACOMO

Switzerland

CHACOMO (Swiss Alliance for Collaborative Mobility) is the association of the shared mobility sector in Switzerland. CHACOMO provides a collective voice within the political process and public debate for its over 30 members accounting for almost 10 million shared mobility trips a year. CHACOMO regularly publishes data, insights and statistics on the development of the shared mobility industry in Switzerland, including carsharing.

chacomo.ch

Can you guide us through the most important developments in Swiss carsharing over the past decades?

Switzerland has played a pioneering role in the development of carsharing. In fact, the first carsharing cooperatives were founded back in the mid-1980s. These groups later merged to become the “Mobility Carsharing Cooperative”, by far the largest provider to date with a market share of around 75% in B2C carsharing. Since 2010, a couple of new, smaller providers have entered the picture and successfully occupied niches: P2P carsharing, carsharing for municipalities, shared utility vehicles and so on. Mobility Carsharing tested free-floating in Basel and Geneva but gave it up after a couple of years due to a lack of success. In 2021, the TCS Mobility Academy founded CHACOMO, the Swiss Alliance for Collaborative Mobility, in order to lobby for shared mobility interests in Switzerland with one single voice. We recently published an initial carsharing policy paper aiming for a tripling of users by 2030.

Why is station-based carsharing so popular in Switzerland?

The station-based model seems to fit best with the understanding of carsharing in Switzerland. Carsharing is promoted where public transport and cycling are not an option: for the transportation of goods on the one hand and for leisure trips in areas of poor public transport on the other. Station-based carsharing covers these use cases in a convenient way. It has developed into a solid and cost-effective business model over the years. Furthermore, station-based carsharing brings measurable sustainability impacts for cities and a great deal of reliability for users.

Like Norway or Ireland, Swiss carsharing focuses on the station-based carsharing model. Why does free-floating carsharing seem to have a hard time in Switzerland?

As mentioned before, free-floating carsharing was seriously tested and then aborted. We see multiple reasons for this failure: the extremely good public transport networks in Swiss cities, a strong focus on promoting public transport and active mobility, and the relatively small size of the cities. Besides that, in Basel the lack of parking spaces seemed to make free-floating trips unattractive to users.

If you could take us on a carsharing research trip to Switzerland, which local carsharing specials shouldn't we miss?

There are a lot of exciting initiatives and projects that are worth a longer visit! You definitely shouldn't miss the opportunity to test the shared, electric micro-vans of smargo. They are used by companies for deliveries as well as by citizens who need to transport bulky items. The “Smargos” are only 1.3 m wide and are therefore perfectly suited to dense urban areas. Another flagship project is the “V2X initiative” by Mobility Carsharing. The project aims to test the potential of bidirectional charging with carsharing fleets for power grid stability and storage. Results are expected in the spring of 2024. AMAG, the biggest Swiss car dealer, is currently driving B2B carsharing forward. They recently launched a new product called “allride”, which combines carsharing with shared micromobility. The focus is on residential estates and corporate mobility. Finally, we would take you to Basel, where the city has recently started allocating public parking spaces to various carsharing providers. An initiative that we have just rewarded with our Shared Mobility Award for cities, the so-called CHACOM-Oscar.



David Bartolome

President of AVCE & Free2move
Regional Business Development
& Public Affairs Manager Spain

Asociación de Vehículo Compartido de España (AVCE)

Spain

The Association for Shared Vehicles in Spain (Asociación de Vehículos Compartidos en España, AVCE) was founded in 2020 and represents many Spanish carsharing operators. They constantly screen, analyze and shape the Spanish carsharing landscape and are an important voice in changing the urban mobility system.

avce.es

Q1: Who are the main station-based carsharing operators in Spain? Which cities have significant fleet sizes?

Spanish station-based carsharing started 19 years ago in Barcelona with the small, publicly driven operator Avancar. In Madrid, Respiro and Bluemove followed in 2009. Today, the main players are Ubeeqo, Getaround and Goto-ASTARA, plus other small operators like MEC Carsharing, Ibilkari and Som Mobilitat that operate small fleets in certain regions and with different models.

Thus, the main station-based carsharing cities in Spain are Barcelona and its metropolitan area, and Madrid. Additionally, there is a smaller presence in small cities in Cataluña, Santa Cruz de Tenerife, Mallorca and Málaga.

Can you explain the different carsharing landscapes in Madrid and Barcelona to us? What are the reasons for these differences?

While both these big metropolitan areas have great demographics for carsharing, they are very different in terms of their culture, urban reality, public space availability, and administration. Madrid has many free-floating and station-based carsharing services, while Barcelona has no free-floating carsharing, due to a lack of political will. There is less public space available in Barcelona, and although city managers recognize the need to offer alternatives to private car use and the potential

of the free-floating model, they have not yet addressed its regulation. Barcelona also enacted controversial motosharing regulations that have prevented advances in other sharing options.

Another reason for the differences is the administrative complexity in Barcelona, whose metropolitan area encompasses several cities, while the City of Madrid alone administers an area big enough to host sharing services. And finally, I believe that having just a few companies manage all the underground parking in Barcelona favors station-based carsharing.

What kind of operator types are active in the Spanish station-based carsharing market?

They range from the mixed station-based/free-floating operations of GoTo-Astara, to the software licensing and support to fleet owners of Getaround, to the cooperative model of Som Mobilitat, which emphasizes a community-based mobility model.

Other smaller local operators like MEC carsharing in Barcelona or Ibilkari in Bilbao focus on their local knowledge and adapt to the specific needs of the locations where they operate.

All of them offer various vehicle models for different customer needs, and their share of EVs is still low, although growing.

How do you see the station-based carsharing market developing in Spain over the upcoming years, and how can policymakers support it?

The model represents a considerable increase in car use efficiency. Its market penetration in Spain is relatively low and concentrated in a few geographical areas. Thus, I think it can only grow, as the need for flexibility and convenience when using a car increases.

The upcoming transition to electric cars will enable the adoption of different ways to access vehicles. We'll see less car ownership and more car usage through carsharing, car rental, subscription, flexible renting, etc. Station-based carsharing has a good chance of gaining market share.

The continued transformation of cities, their public spaces, and institutional support will be key to this. Sustainable and efficient management of public spaces will continue to develop, and here station-based carsharing will have its role, as we already see in several cities in Europe. Additionally, policymakers can encourage the development of charging infrastructure to facilitate the adoption of shared EVs, aligning with broader sustainability goals.

Finally, we're still missing broader involvement of public institutions to support the sharing concept with specific measures or information campaigns. Local governments are involved in bike-sharing to transform their cities, which is great. Carsharing services will be the perfect complement.



Antonia Roberts

Deputy Chief Executive

CoMoUK

United Kingdom

CoMoUK is the UK organization for shared transport. They cover services that share cars, bikes and e-bikes, rides in cars, e-scooters and Digital Demand Responsive Transport services (DDRT). Their carsharing reports are highly detailed and are among the top European industry reports in the space. They also organize the Annual Shared Transport Conference.

como.uk.org

How important are station-based carsharing services for the local carsharing landscape?

The station-based car sharing is the only operational model in towns and cities in the UK, except for London which has a mix of station based and free floating in approximately half of the city boroughs. The 2022 CoMoUK report showed that 42% of those who use the free-floating also use round trip, and that these mixed mode users are slightly more frequent users than those who use round trip alone. This suggests that a mix of options improves the convenience of car sharing for many members. All car club users still drive less than the average Londoner.

Some cities areas have deployed “back to area” car sharing using one or two geofenced streets as a base to reduce the cost and time involved with signing and lining a designated bay.

How is carsharing regulated in the UK and what policy trends do you see for the coming years?

There is no statutory regulation of car sharing in the UK. CoMoUK runs a voluntary accreditation service which all operators apply to each year. The standard covers four aspects of operations: business requirements, service provision, safety, and data collection. Accreditation provides local authorities with a system to identify bona fide operators whilst also ensuring the standards are reviewed and improved annually.

How does the electrification of local (station-based) carsharing fleets compare to the electrification of private cars?

The share of electric cars within the UK’s car club fleet grew from 12% in 2021 to 14% in 2022. This compares favourably to only 2% of private cars in the UK being electric. There is a need for authorities to install more designated charging bays and rapid charging infrastructure for car sharing vehicles in order to support the rate of transition.

What are the key findings of CoMoUK’s latest annual online survey of UK carsharing operators?

CoMoUK has been creating the annual report for over a decade which is independently verified each year. The 2022 confirmed car share users as infrequent drivers, 70% of those who responded use the service less than 5 times per year. As we would expect with those with a “low car lifestyle”, members report that they also use public transport and cycle more than the average person in the UK. In addition, as members are using fewer vehicles more efficiently we calculate car share cars can replace on average, 22 private cars, freeing up valuable kerb side space for other community uses such as mobility hubs.

INVERS webinars: Exploring carsharing 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

Advanced data for shared mobility operations

- How to generate and use data to identify and reward vehicle-friendly driving styles and behaviors
- Why effective data visualization tools improve accident and incident response times and investigations

Speakers:

- **MILES** (Nitin Maslekar, Head of Product and Technology)
- **INVERS** (Christoph Müscher, Product Management)
- **INVERS** (Christoph Müller, Field Application Engineer)

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

6

Trends

**Our Top 5 European
Station-Based
Carsharing Trends**

Top-level trends

Aggregated observations of the station-based carsharing space



1. Market focus on Western, Northern and Southern Europe

Station-based carsharing has been surging since at least the 80s. We found its growth is particularly strong in Western, Northern and Southern Europe.



2. Increasing number of vehicle types

In recent years, we found an increasing number of operators that offer more special use-case vehicles with different form factors.

Examples:

- Transporters
- Microcars
- Luxury segment



3. Joining forces

There have been company purchases and plenty of new partnerships in order to join forces.

Examples:

- Norwegian-based Hyre acquired Danish LetsGo
- MyWheels is deepening their partnership with We Drive Solar
- WienMobil & sharetoo joined forces in Vienna starting in Q3 2022

Top-level trends

Aggregated observations of the station-based carsharing space



4. Fleet Electrification

Operators are increasingly working to electrify their fleet. Despite huge challenges, some of the leading European markets have already achieved significant electrification rates.

Examples:

- 30% electrification in Dutch roundtrip carsharing (CROW-KpVV 2023)
- 20% in German carsharing fleet (bcs 2023), station-based + free-floating combined
- 60% electrification in Italian station-based carsharing fleet (Osservatorio Nazionale Sharing Mobility 2023)



5. Tech innovations

Carsharing providers show an increased interest for integrated data. Reasons include: making the fulfillment of their use cases more efficient, better profitability, enabling fully new industry use cases.

Examples:

- New innovations such as automated damage detection
- Potentially supporting cities with urban planning data

7

Summary and Outlook

Main takeaways

Summary

Key insights from the report

European station-based carsharing, sometimes also called roundtrip carsharing, has experienced substantial growth across many markets in the recent years.

There are at least 55,000 station-based carsharing vehicles in Europe.

The top 5 markets for station-based carsharing in Europe are Germany, France, Netherlands, the UK, and Switzerland.

Additionally, noteworthy markets include Austria, Belgium, Norway, Spain, and Sweden.

Millions of users are registered for these services, and local data from our meta study indicates a continuous expansion of customer bases in many markets.





Summary

Key insights from the report

Top level market trends:

- The market is most established in Western, Northern and Eastern Europe.
- The variety of vehicle types is growing, catering to different user needs and preferences.
- There have been company purchases and plenty of new partnerships.
- Fleet electrification is noticeable, aligning with the broader shift toward eco-friendly transportation.
- There are ongoing tech innovations that enhance user experiences and operational efficiency.

Keep an eye out for the rest of the world. While Europe stands as a lead market, station-based carsharing has a global presence.

8

About and Sources

Who is INVERS and reading tips

About INVERS

Who we are

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

We act as an independent and reliable partner for operators of services such as carsharing (free-floating, station-based, P2P), moped sharing, scooter sharing, ride pooling as well as 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.

www.invers.com

Want to start or scale your own carsharing service?

INVERS can help you connect your fleet, and use data to streamline operations



Reliable connectivity solutions that fit your needs

Connect your cars with a range of **sophisticated solutions** engineered for maximum data availability and over 99,9% uptime on a global scale



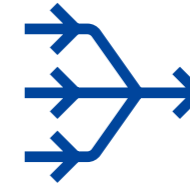
Designed for profitability

Optimize your revenue streams by increasing **vehicle lifetime** and **fleet utilization** with our growth-oriented tool stack



Skip the spreadsheets, fast-track insights

Stay in the know and make informed decisions with **automated analyses and visualizations** of rich, real-time data



Streamline your customer journey

Effortlessly automate all stages of the rental process with our **comprehensive ecosystem**, so you can focus on what really matters

Contact our experienced sales consultants 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 Car Subscription Barometer

(42 pages)

Why read it?

- Exclusive insights from providers like imove, FINN, Faaren, aboDeinauto, ViveLaCar, and Instacar
- Explore 5 key trends of the sector
- Find ten highlighted reads in our meta study

[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](#)

Sources

Where we got our info from and further food for thought and reading tips

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