

Global Car Subscription Market: Analysis By Vehicle Type (Executive Car, Luxury Car, Economy Car and Others), By Subscription Period (1 to 6 months, 6 to 12 months, and More than 12 months), By Service Provider (Independent/Third Party Service Provider and OEM), By End User (Corporate and Private), By Region Size & Forecast with Impact Analysis of COVID-19 and Forecast up to 2029

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Abstracts

Car subscription is the next generation of car-as-a-service offerings. Car subscription services offer premium vehicles for a monthly fee without committing to a lease or getting stuck with a long-term rental. They include insurance, maintenance, fees and even the freedom to swap cars. The subscription length will most likely range from a month to more than a year, depending on the customer's needs. Car subscriptions also provide the option of switching the vehicle for another vehicle accessible under the company's subscription model. Subscriptions have similarities with rentals and leasing, although the differences with leasing can sometimes be unclear. Essentially, the customer pays a monthly charge for a vehicle, with most expenditures (excluding fuel) covered: maintenance, repairs, roadside support, registration fees, insurance, and taxes. In 2023, the global car subscription market was valued at US\$5.90 billion, and is probable to reach US\$26.26 billion by 2029.

In recent years, some consumers have been opting for alternative options over owning a vehicle due to increasing interest rates and a shortage of vehicle inventory. In numerous countries, there has been a notable increase in the popularity of vehicle subscription services and choices. The main drivers of global car subscription market

are mostly shifting customer habits, which are characterized by a predilection for on-demand services and a move away from conventional ownership structures. Also, the shift from ownership to usership and the move to EVs, have been tailwinds for the subscription business, and they will continue. Moreover, millennials, especially, will be increasingly interested in subscription services due to the appeal of a debt-free and economical alternative. Global car subscription market is estimated to boost in the coming years due to increased integration of artificial intelligence, emergence of in-car subscription services, strategic partnerships with automakers, technological developments, etc. The global car subscription market value is projected to grow at a CAGR of 28.24%, during the forecast period of 2024-2029.

Market Segmentation Analysis:

By Vehicle Type: According to the report, the global car subscription market is segmented into four vehicle types: Executive car, Luxury car, Economy car and others. Executive car segment acquired majority of share in the market in 2023, because such cars offer versatility and are highly spacious which means that can have numerous applications. Whereas, economy car segment have the fastest growing CAGR in the future, as some consumers opt for economy car subscriptions as part of their efforts to reduce their environmental impact smaller, more fuel-efficient vehicles in this segment can align with sustainability goals.

By Subscription Period: According to the report, the global car subscription market is segmented into three subscription period: 1 to 6 months, 6 to 12 months, and more than 12 months. 6 to 12 months segment acquired majority of share in the market in 2023 and is expected to grow with the fastest CAGR, as include individuals who need a car for a medium-term duration due to work assignments, extended travel plans, or other reasons. Moreover, businesses and corporate entities are increasingly turning to car subscription services for their fleet management needs.

By Service Provider: According to the report, the global car subscription market is segmented into two service provider: Independent/Third Party Service Provider and OEM. Independent/Third Party Service Provider segment acquired majority of share in the market in 2023 and is expected to grow with the fastest CAGR, as independent service providers provide a greater selection of vehicles in comparison to traditional dealerships or subscription services offered by automakers. Moreover, third-party providers typically offer streamlined processes for subscribing to a car, managing payments, and scheduling maintenance. This convenience is appealing to busy consumers who value a hassle-free experience when it comes to their transportation

needs.

By End User: According to the report, the global car subscription market is segmented into two end user: Corporate and Private. Corporate segment acquired majority of share in the market in 2023, as businesses can easily modify the type and quantity of vehicles in their subscription fleet to meet changing demands and business requirements without the need for long-term commitments or dealing with asset depreciation. Whereas, private segment have the fastest growing CAGR in the future, as many consumers find subscriptions to be a cost-effective option, especially if they do not need a car daily or require different types of vehicles. Instead of making a large upfront payment to buy a car or entering into a long-term lease, they can pay a monthly fee that usually covers maintenance, insurance, and other related expenses

By Region: The report provides insight into the car subscription market based on the supply, namely Europe, North America, Asia Pacific, and Rest of the World. Europe car subscription market enjoyed the highest market share in 2023, owing to the increasing number of individuals, particularly non-car owners, gravitating towards Vehicle-as-a-Service (VaaS) models. In addition, European car subscription market players are adopting various strategies to further increase their market share. For instance, in December 2023, Volkswagen acquired 4.99% of the ordinary shares of the electric vehicle company XPeng Inc., Cayman Islands, (XPeng) at a purchase price totaling US\$706 million.

Asia Pacific car subscription market is expected to grow with the fastest CAGR, due to the increasing demand for automobiles, as well as the rising young population experiencing growth in opportunities and per capita income. The growing adoption of Mobility-as-a-Service (MaaS) will impact the car subscription industry, as customers look for all-encompassing solutions that merge different forms of transportation like ridesharing, public transport, and car subscriptions.

As China continues to emphasize environmental sustainability and invest in electric vehicle (EV) infrastructure, there will likely be a growing demand for electric cars in car subscription services. Subsequently, the market for car subscriptions in India is expected to become more competitive as new companies enter the sector.

Global Car Subscription Market Dynamics:

Growth Drivers: Access to a variety of vehicles plays a pivotal role in driving growth in the global car subscription market as car subscription services offer users the

opportunity to access a wide variety of vehicles such as sedans, SUVs, luxury cars, and electric vehicles (EVs). Moreover, customers value having the correct type of vehicle, such as an SUV or 4x4, more than a particular brand when making a choice.

Subscription services that offer a variety of vehicle options are more capable of satisfying customer preferences. Further, the market is expected to grow driven by rapid urbanization, augmenting population, rising digitalization, rising cost of vehicle ownership, stringent government regulation regarding emission control, lack of proper public transportation infrastructure in developing countries, rising penetration of third-party automotive subscription service providers, etc.

Challenges: The market's expansion is projected to be hampered by accessibility of substitution, due to its potential to alter consumer behavior and preferences.

Consumers may opt for alternative transportation modes such as ride-sharing services like Uber and Lyft, public transportation, or micro-mobility options such as electric scooters and bicycles instead of using a car service. The other challenges that car subscription market faces include restricted geographic availability, etc.

Trends: One of the most distinct and pervasive trends observed in the global car subscription market is integration of artificial intelligence. AI algorithms in autonomous vehicles continuously analyze data from sensors, cameras, and other sources to make real-time driving decisions. This capability enhances safety by reducing the risk of human errors and accidents. In the context of car subscriptions, customers are more likely to trust and adopt autonomous vehicles if they are equipped with advanced AI systems that ensure safe and reliable operation. More trends in the market are believed to augment the growth of car subscription market during the forecasted period include, augmenting electric vehicles, emergence of in-car subscription services, technological developments, sustainability, mobility as a service, personalizing the car subscription experience with IoT, etc.

Impact Analysis of COVID-19 and Way Forward:

The impact of COVID-19 on the car subscription market was negative. Car subscription services experienced a significant decrease in popularity when individuals began staying at home because of lockdowns, travel restrictions, and economic instability. This resulted in a drop in the demand for cars in general, including those obtained through subscription plans. Some car subscription companies temporarily suspended their services or reduced their fleet size during the height of the pandemic.

Competitive Landscape and Recent Developments:

Global car subscription market is large and highly fragmented with a large number of players. Current participants in the automotive industry, including original equipment manufacturers (OEMs), dealers, captives, leasing, and rental companies, view subscription services as a complementary offering that allows them to make more effective use of their current vehicle inventory, typically using their own brands. Companies like Cluno exclusively focus on offering subscription services with a fleet of vehicles branded under their own name. Key players of global car subscription market are:

Bayerische Motoren Werke AG (BMW Group)
Volkswagen Group
Volvo Group
Hyundai Motor Company
Toyota Motor Corporation
The Hertz Corporation
Nissan Motor Corporation
Mercedes-Benz Group AG (Mercedes-Benz Mobility AG)
Onto
Carly Holdings Limited
Wagonex
Steer EV

The key players are constantly investing in strategic initiatives, such as new launches, mergers & acquisitions, introducing their products to emerging markets and more, to maintain a competitive edge in this market. For instance, in February 2023, Maruti Suzuki, a global provider in the automotive segment, announced its collaboration with SMAS Auto Leasing India Pvt Ltd. The collaboration would aim at improving the former's vehicle subscription services. SMAS is currently the fifth partner offering Maruti's vehicles to offer white plate subscriptions. Also, in October 2022, PSA Financial Services Netherlands which is a joint venture with Santander and Banque PSA Finance (Stellantis) as core members, announced partnering with Casi, a Norwegian startup. The move will assist the former in launching car subscription service named Drivenjoy in the Dutch-speaking territory.

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