Establishing the market for Car-Sharing?

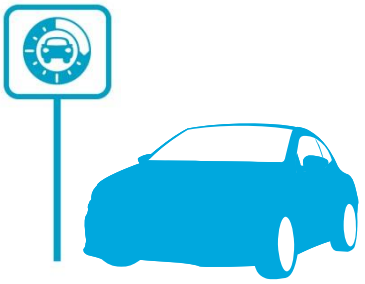
Civinet Workshop Warsaw

06 May 2014

What is Car-sharing?

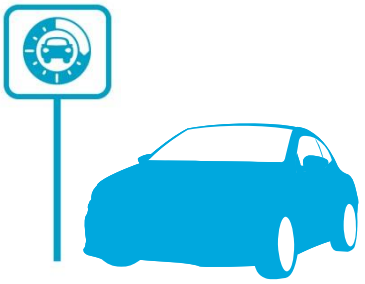
Car-sharing

- A pool of cars available for round trip use
- Members have access to a network of self-service pay-as-you-drive vehicles
- Located in dedicated parking – on street or off-street



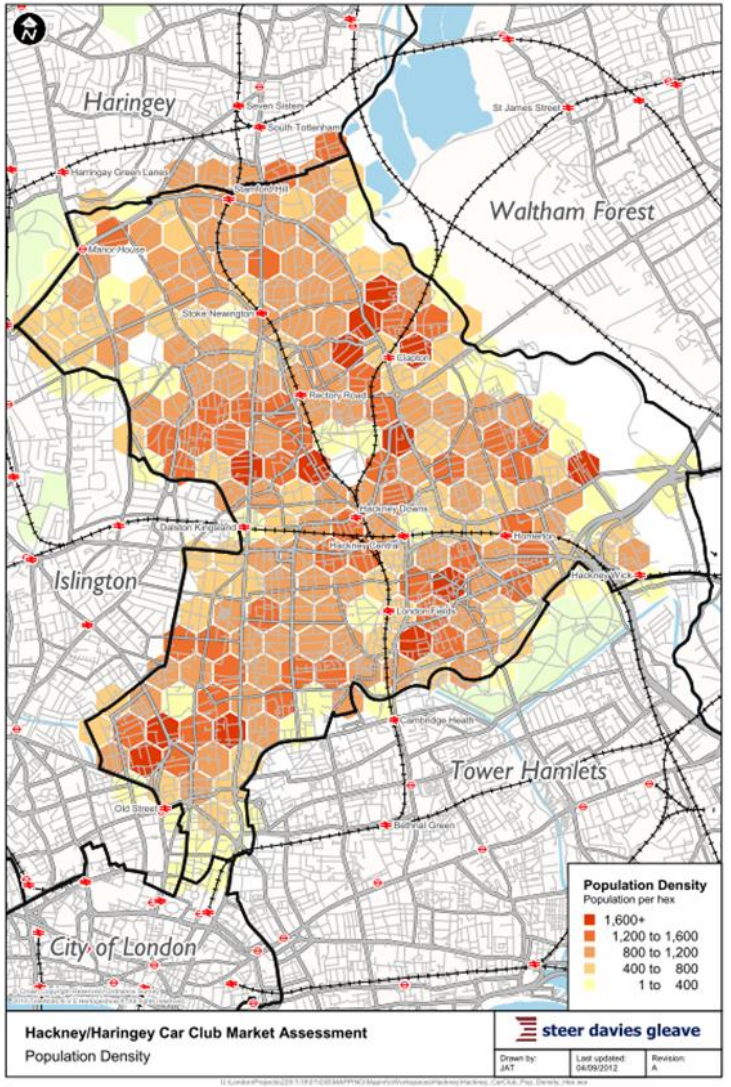
What is Car-sharing? 2

- **Point to point and flexible schemes** offer one-way options – parking is at fixed or floating bays
- **Peer to peer car-sharing –** based on using spare capacity in private cars



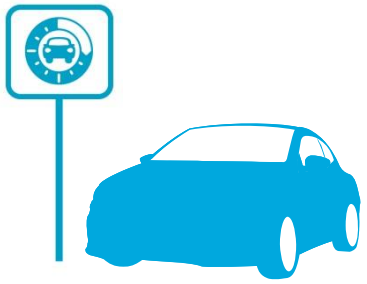
Where will car-sharing work?

- High density areas with parking pressures
- Sufficient customers within 500m of parking locations
- Areas with good public transport – for getting to work



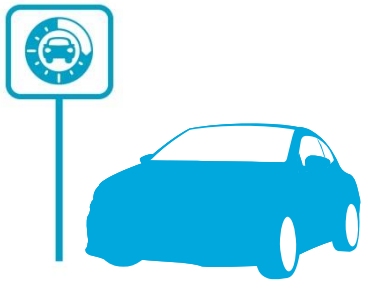
Planning system helps

- Design of new car-free housing with limited parking
- Parking permit systems to deter all-day parking in residential areas
- Low emission zones encourages ultra low emission vehicles (ULEV)



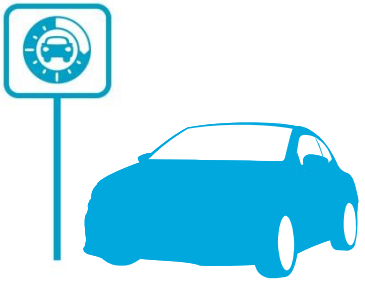
Inter-modality

- Car-sharing complements other modes – but access and booking needs to be easy
- Parking at or near transport hubs
- Supported by public transport operator



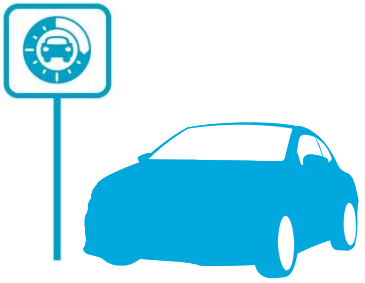
Case study: Aberdeen

- Main city of oil and gas industry (175,000 people)
- Launched in April 2012
- Initial funding from Aberdeen City Council – parking and marketing
- Support from Scottish Government through Carplus for vehicles



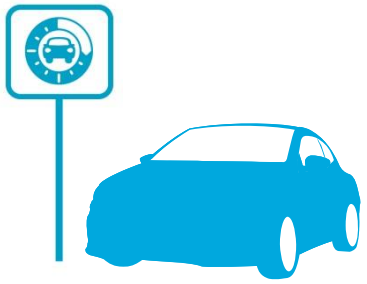
Aberdeen

- Run by Co-wheels CIC – a not for profit operator
- 500 members (60% ACC)
- 17 vehicles mainly located on-street and off street –includes 7 EVs and 1 wheelchair accessible vehicle (WAV)
- Council is active in use of car club – helps to get other employers to join



Case study: York

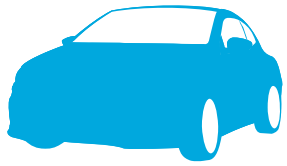
- York – historic university and tourist city (100,000 people)
- Congested – with park & ride as solution
- Car-sharing run by City Car Club with 18 on-street cars; 1 at housing development; 1 van
- used by Council and by inner city residents



Case study: York

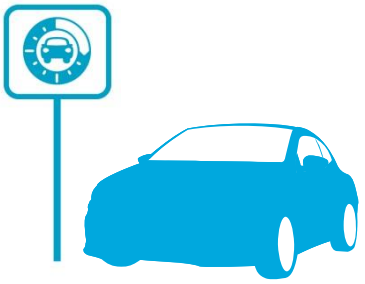
- Operated for a few years on a small scale (8 cars) mainly for residents
- Lacked scale of network and visibility to reach market
- Over last 18 months used increasingly by City Council for local business travel
- Council uptake results in 68% of utilsation*; remainder mainly residents

* First 3 months 2014



Who uses car sharing?

- People with higher education
- Commuters using public transport or bicycles
- People under 35 – especially urban professionals
- Specific demographic types – London examples



Understanding the users

Mosaic Type	% Survey Respondents	% Population	Proper to be a clu mem
Urban Cool	25.5%	8.8%	28
Bright Young Things	20.3%	7.3%	27
Global Power Brokers	3.6%	1.9%	18
Crash Pad Professionals	5.2%	3.8%	13
Multicultural Towers	10.4%	8.8%	11
Mosaic Types	65.0%	30.6%	

Urban Cool

Three time more likely to be a member than average

- Well educated professionals
- Relatively high incomes
- In their 30s and 40s
- Living in attractive housing, mainly in Inner London

Bright Young Things

3x more likely to be a member than average

- Young professionals
- Good salaries
- High outgoings
- Living in smart purpose-built apartments
- Mainly in Inner London - within easy reach of entertainment, shops and services

Crash pad professionals

- In their late 20s and early 30s
- Typically single young professionals
- Living in Outer London areas
- Good commuter links to work in Central London
- Unlikely to be settled in one location
- Likely to move home often as work and personal commitments change

Car-sharing journeys in London

Journeys - mainly for leisure purposes

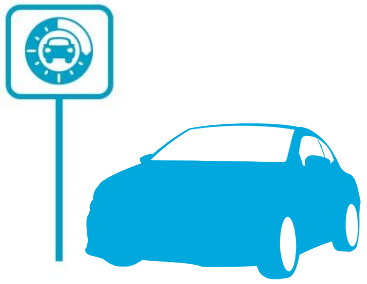
- 29% for shopping
- 27% for leisure
- 22% for personal business
- 22% visiting friends or relatives

When public transport is impractical

- 58% of journeys included carrying a large item of luggage or shopping

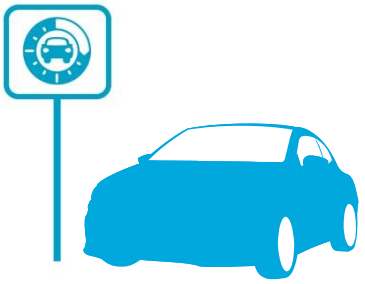
Marketing car-sharing

- Challenges for car-sharing operators
- The service is location specific – makes it hard to target potential market
- Focus on convenience, self service and reliability before cost

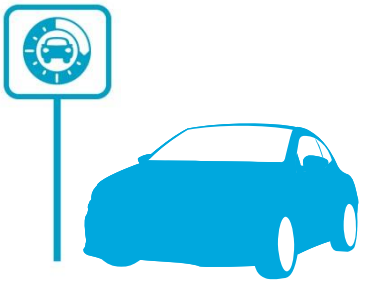


Raising the profile

- **Political acceptance** – as contributor to carbon reduction and cleaner air quality
- **Public recognition** in main car-sharing cities
- **Visibility** of the clockface logo and operator brands

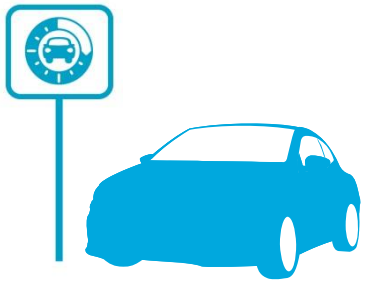


The benefits of car-sharing



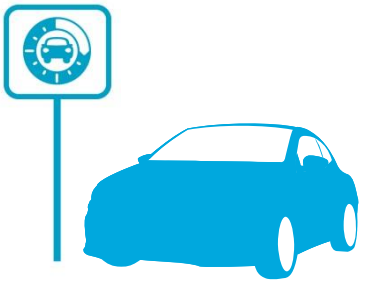
Carplus role

- **Advocacy** of low carbon, shared mobility
- **Promote** increased public acceptance and recognition by government
- **Secure resources** for innovation and growth of car-sharing



Carplus role 2

- **Practical support** for cities and car-sharing operators
- Technology support for smaller operators
- **Research and development** on
  - corporate car-sharing
  - shared EVs

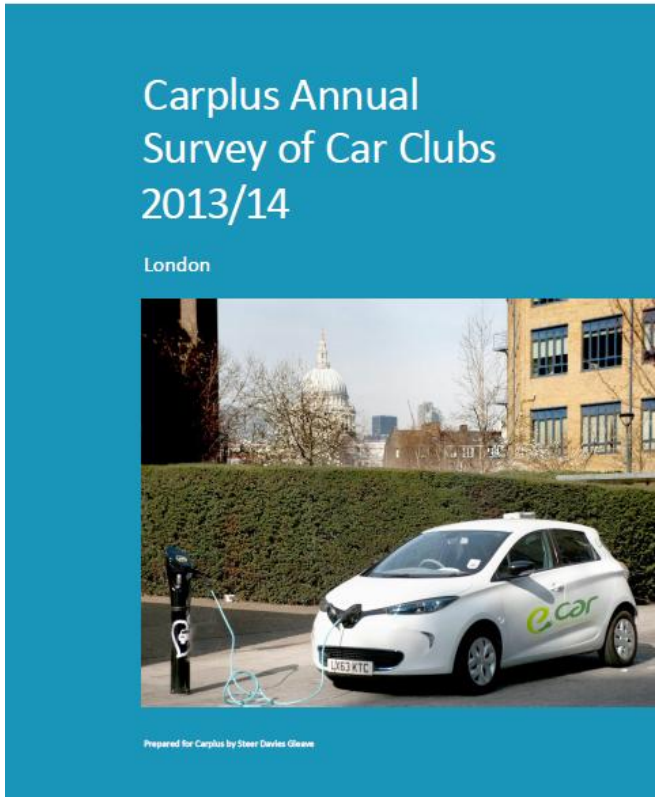


Carplus role 3

Expand markets through inter-operability with public transport

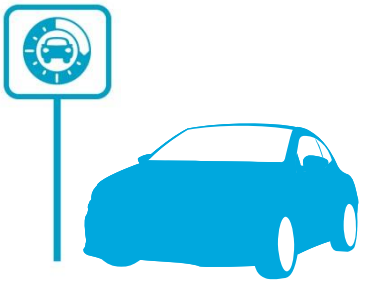
Protect car-sharing through **accreditation** of car club operators

Ensure **data collection** is used to demonstrate positive effect of sector



Expand concept of sharing…

- **Bike-sharing** – city schemes like NextBike, working in partnership with train operators
- **2+Car sharing** – matching empty space in cars to people needing lifts – for commuting and for one-off social trips
- **Taxi-sharing** – new social media applications



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