

Car Clubs in Britain – a Dynamic Experience

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History

- Car clubs (car-sharing) starts in UK in 1999 (Edinburgh)
- Slow development in a few cities incl. London (2003) – mainly by City Car Club
- Accelerated from 2006 with arrival of Streetcar
- All station-based/round-trip
- Most using on-street parking



State of Play – end 2015

- 200,000 members – 3,500+ cars
- Mostly round trip (station-based)
- **London** – 80%
- Flexible and point to point EV models in new capital plan



State of Play 2015

Scotland

- Steady growth from 2010
- Highest proportion of ULEVs - £1M funding
- Strong foundations



State of Play 2015

England (not London)

- Government agreed to fund national car club development programme
- Kick-start funding support 2014 and 2015
- Helped to grow existing schemes (Norwich); start new cities (Derby); encourage integration (Nottingham, West Yorkshire)

Carplus role

- **Advocacy** of low carbon, shared mobility
- **Promote** increase acceptance and recognition
- **Accreditation** of car club operators and data collection
- **Secure resources** for innovation and growth



Taking Stock

- Shared mobility gaining acceptance - recognized in meeting carbon and air quality targets
- New interest in growth potential by rental sector, OEMs and rail operators
- Foundations established in more cities and towns
- Small but growing rural network

Lack of urgency

- Recognition of role of shared mobility is limited
- Lack of political urgency on main policy drivers – climate change, air quality - a key factor
- Land use planning policies – going backwards

Can we sell shared mobility?

- Shared mobility not as sexy as shiny new technology – a lot cheaper
- To succeed needs cross-cutting solutions
 - Smart cities
 - Planning and development
 - E-mobility
 - Business travel – pool cars, fleets
 - Parking

Government intervention

- Kick start not subsidy
- Investment in *demonstration* and *change*
- Technology and vehicles not the funding priority
- Diverse programmes – different stages of development



London's future strategy

- Big ambition in London
- TfL assisted by “coalition” of operators and key stakeholders
- New Car Club Strategy for London to be published this month –

Growing car clubs

to support London's transport future

Report says main drivers are:

- Freeing parking space
- Environmental benefits – carbon emissions and air quality
- Promoting familiarity with EVs
- Reducing cost for households
- Reducing cost for business and employers

Factors limiting ambition:

- Regional governance and national policy
- Delivery
 - Availability of parking space and limitations of re-charging
 - Capacity of boroughs
 - Creating incentives for adoption
- Awareness and visibility

Operators change

- Consolidation – Enterprise now operating City Car Club (800 cars throughout Britain)
- **Rental sector** – taking over but is it absorbing or maintaining the culture of car clubs?
 - Hertz – Hertz 24/7 NO
 - Avis/Budget – Zipcar YES
 - Enterprise – City Car Club ?
 - Europcar – not yet involved

New operators

- **OEMs** – ambitious and well funded
- Hard to adapt to local conditions
 - **DriveNow** – pioneering in 4 of 33 London boroughs
 - **Car2go** – failed to recognise how we do it
 - **Ford** trials

Independent Operators

- Co-ops and Community Enterprises assuming leadership role in promoting concept
 - Co-Wheels CIC (300 cars in 30+ locations)
 - Co-cars Co-op (20 cars in SW England)
 - E-car (shared EVs only)

Innovation

- New models of shared mobility
- Adoption slow in UK
- Expect some changes by 2017
 - Shared e-mobility (round trip) – E-Car, Co-Wheels
 - Shared e-bikes – new innovation funding managed by Carplus
 - Point to point EVs – Bollere (London)
 - Flexible/one-way – DriveNow (London)

Challenges

Political priorities

Economic – making the case

Investing in people and change



Thank you, Michael





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