New co-mobility services
How to expand the customer base?

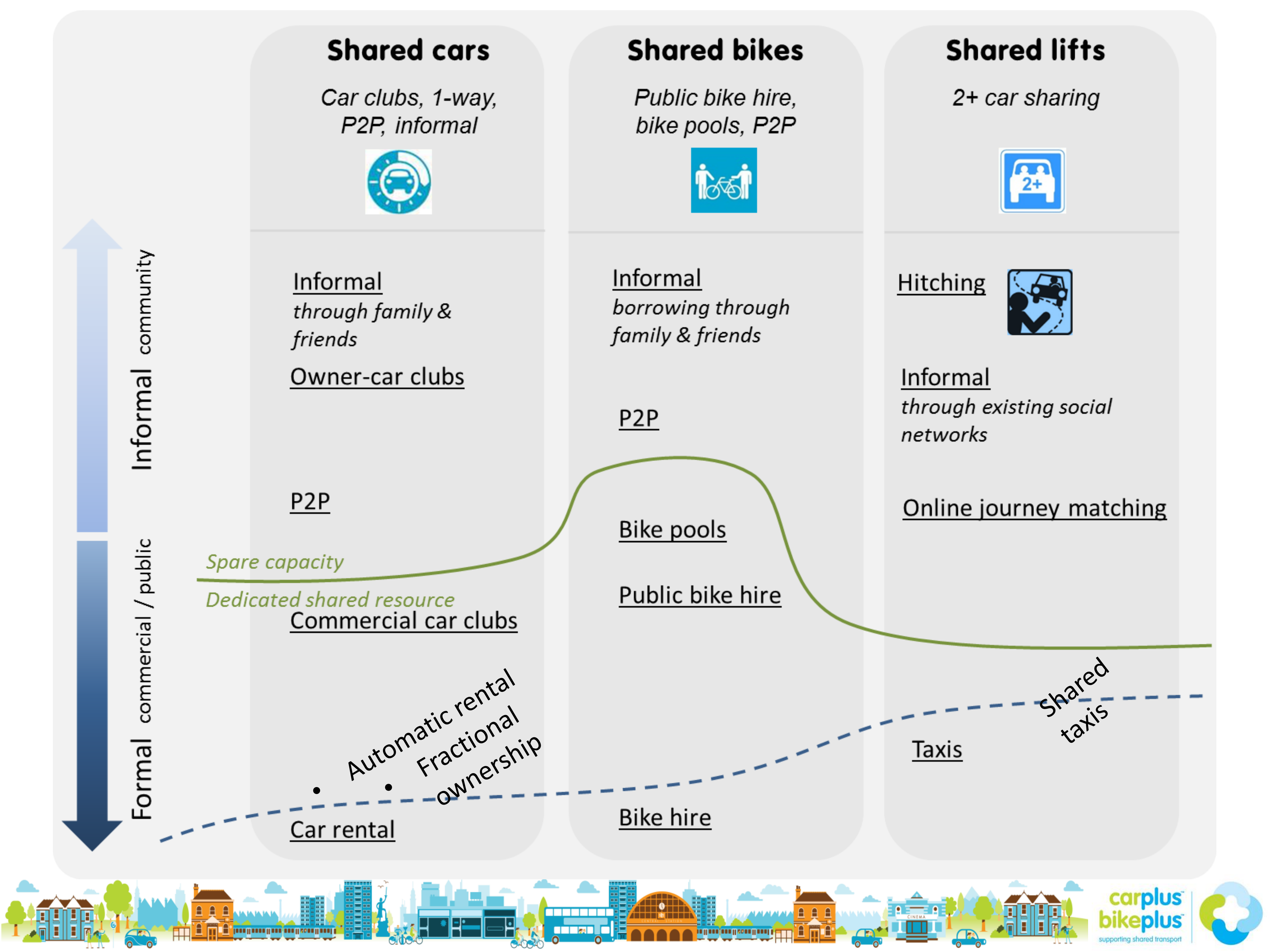
Alistair Kirkbride
Director, Carplus
alistair@carplus.org.uk

What is co-mobility?

Who uses it – and who doesn't?

4 markets for expansion

Why & who?



Shared cars
Car clubs, 1-way, P2P, informal
Shared bikes
Public bike hire, bike pools, P2P
Shared lifts
2+ car sharing
2+
Informal community
Formal commercial / public
Informal
through family & friends
Owner-car clubs
P2P
Spare capacity
Dedicated shared resource
Commercial car clubs
• Automatic rental
• Fractional ownership
Car rental
Informal
borrowing through family & friends
P2P
Bike pools
Public bike hire
Bike hire
Hitching
Informal
through existing social networks
Online journey matching
Shared taxis
Taxis
carplus bikeplus
supporting shared transport

Overlay of services

✓✓✓	Predominant
✓✓	Yes/ likely
✓	Possibly
	as now
	Unknown

	Flexi	Back-to-base	Fractional ownership	Local pool	Informal carshare	Peer-to-peer car rental	Automatic rental	Public bike hire	Bike pool	Peer to peer bike rental
	DriveNow	zipcar	Audi unite			easyCar club The social way to hire	enterprise CarClub	nextbike		Spinlister The global bike share
City	✓✓✓	✓✓	✓✓✓	✓	≈	✓✓	✓✓✓	✓✓✓		?
Town		✓✓✓	✓✓	✓✓	≈	✓✓	✓✓✓	✓✓	✓✓	?
Village				✓✓	✓✓	✓✓	✓✓		✓✓	?
Rural					✓✓	✓✓	✓			?
Housing		✓✓✓	✓✓	✓✓		✓✓			✓✓	?
Workplace		✓✓✓		≈					✓✓✓	?
Corridor stations	✓✓	✓✓					✓✓			

carplus bikeplus
supporting shared transport

What is co-mobility?

Who uses it – and who doesn't?

4 markets for expansion

Why & who?

O62	Central Pulse	Entertainment-seeking youngsters renting city centre flats in vibrant locations close to jobs and night life
A02	Uptown Elite	High status households owning elegant homes in accessible inner suburbs where they enjoy city life in comfort
A04	Metro High-Flyers	Ambitious 20 and 30-somethings renting expensive apartments in highly commutable areas of major cities
N60	Ageing Access	Older residents owning small inner suburban properties with good access to amenities
O61	Career Builders	Motivated singles and couples in their 20s and 30s progressing in their field of work from commutable properties

www.carplus.org.uk/tools-and-resources/annual-survey-of-car-clubs/

carplus bikeplus supporting shared transport

The income distribution of bikesharing members is skewed toward a higher income level relative to the population in each of the five cities in the Phase II survey (Minneapolis-Saint Paul, Salt Lake City, Montreal, Toronto, and Mexico City).

In all cities surveyed in Phase II, the dominant age category for bikesharing membership was the 25 to 34 year old demographic.

Education is skewed more toward higher levels among bikesharing members relative to the population. For example, more than 80% of members in the two U.S. cities had a Bachelor's degree or higher.

In Montreal, the survey found a 50-50 split of men and women using bikesharing. The remaining cities (Mexico City, Salt Lake City, and Toronto) exhibited a male majority of members.

Shaheen *et al* 2014

	X % car club users	Y Number of Mosaic category types (/66)	Z % population
London	76%	6	44%
England & Wales	74%	7	22%
Scotland	74%	9	26%

"X% of car club users are in Y Mosaic groups (of a total 66). These groups account for Z% of the population"

2014-15 ***2025***	**London**	**England & Wales**	**Scotland**
Members	171,077 *1,000,000*	27,585 *3,296,000*	8,566 *371,000*
Cars removed	18,863 *110,257*	2,442 *291,767*	835 *36,160*
Annual mileage reduction	276,631,509 *1,617,000,000*	52,687,350 *6,295,360,000*	15,710,044 *680,414,000*
Annual carbon reduction (t)	70,142 *410,000*	13,241 *1,582,080*	

carplus bikeplus
supporting shared transport

What is co-mobility?

Who uses it – and who doesn't?

4 markets for expansion

Why & who?

Expansion

Expand shared transport or expand the benefits of shared transport?

4 targets

1. "Mopping up" core markets
   Accelerate uptake / remove barriers

2. Diffuse into the "realiser" / second adopter markets

   Next market – the realisers

   - Those who start to see shared transport as their norm (c.f. innovation diffusion; second adopters)
   - New generations (e.g. low driving license uptake / never owned a car urban living etc)

Expansion

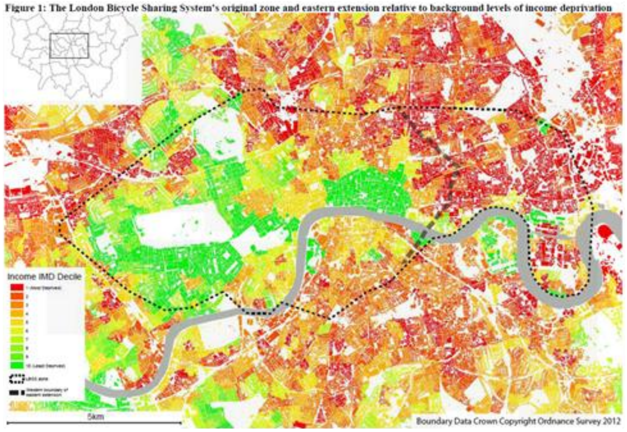
3. Next market – the benefitters

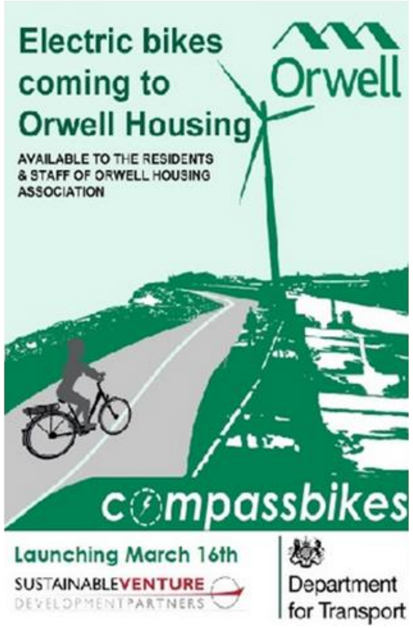
Those who don't - who are these people?

- Those who would benefit socially or economically - fairness
- Those whose impact of their travel behaviour would reduce

a. Right model:
   - Wrong presentation / marketing?
   - Wrong place?

b. Need / opportunity for new models?





- Does everyone want to share?
- Is "sharing" a middle class tyranny?
- Can/should "shared mobility" be pitched as a new form of ownership?

BMW's Mini Concept Prepares for Future Without Car Ownership

Bloomberg Technology

Expansion

4. Informal co-mo
    - Scale?
    - Who?
    - Impacts?
    - Potential?

- (how) can this be expanded?

What is co-mobility?

Who uses it – and who doesn’t?

4 markets for expansion

Why & who?

Expansion of Co-mobility

- Near market
- Next markets

Why?

- Co-mo or benefits or co-mo?

Who?

Roles, Governance, leaders in…

- Developing market opportunities
- Identifying market failure

Alistair Kirkbride
Director, Carplus
alistair@carplus.org.uk

www.carplus.org.uk | @CarplusTrust
www.bikeplus.org.uk | @bikeplusbike
http://infobank.carplus.org.uk/

carplus bikeplus
supporting shared transport