








Determining the market potential for car clubs in Islington and Camden


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Summary

- What is a car club?
- General benefits of car clubs
- Islington's car club today
- Camden's car club today
- How BIG can car clubs get?
- Benefits of further growth
- How will we get there?
- Where to go for help







Car clubs sweeping the globe...







Or how about:

- Pay-as-you-drive access to cars
- Conveniently located
- More affordable than owning (for occasional drivers)
- All-inclusive price (fuel, insurance, tax, parking, etc)
- Book by phone or internet – access using smart card








Why car clubs are essential in today's British city/town

- To reduce car ownership
- To reduce parking pressures
- To reduce car use
- To reduce traffic congestion
- To reduce carbon emissions
- To increase use of healthier, more environmentally friendly forms of travel
- To challenge the cultural dominance of cars and car ownership



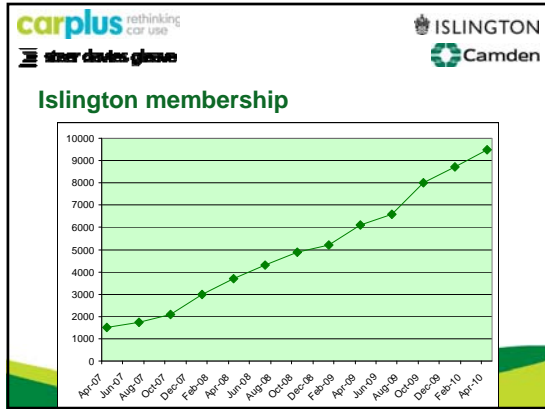




Islington's car club today

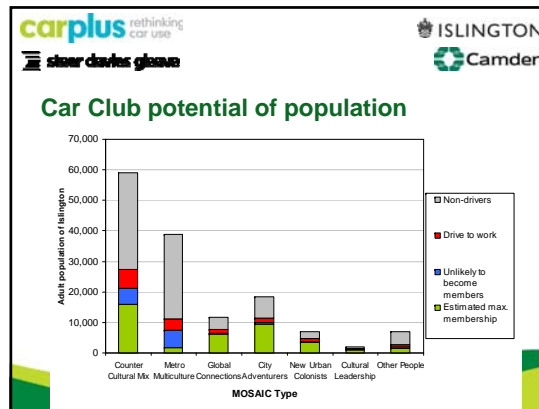
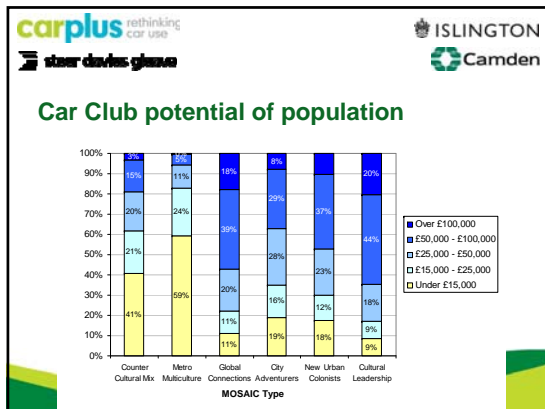
- 10,300 members
- 120 locations in the borough (plus 80 more over the summer)
- Award-winning single-operator partnership with Streetcar
- Consistent growth
 - Monthly growth of 6% (between April 2007 and September 2009)
 - 21% growth in 2010



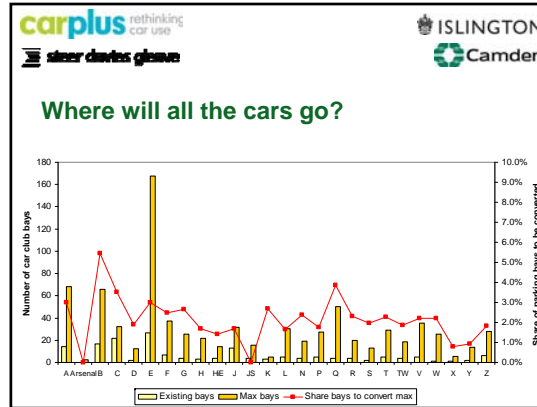
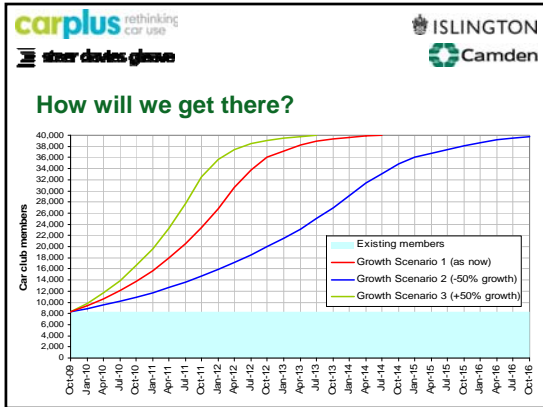


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- ### Camden's car club today
- 5,200 members
 - 156 car club bays in 98 on-street locations
 - Camden work with 4 operators: Streetcar, Zipcar, CityCarClub and Connect by Hertz
 - Monthly growth of 7% between 2008 and 2009
 - 1 electric car club car on-street
 - 1 plug-in hybrid car club off-street

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- ### How BIG can car clubs get?
- Analysis of the potential market
 - Use of car club member data and TfL travel survey data
 - Segmentation of populations by demographics and analysis of each population segment by
 - Driving licence holding
 - Travel to work by car
 - Household car ownership
 - Household income
 - Weekly car trips



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- ### Potential car club members
- Islington – estimated maximum of 40,000 members
 - Could require 800 bays borough-wide (50 members per car)
 - 8,000 fewer private cars parked in Islington?
 - Camden – estimated maximum of 65,000 members
 - Could require 800 to 1,300 bays borough-wide (50-75 members per car)
 - 1/4 to 1/3 of eligible drivers likely to join a car club
 - Maybe more, if new market segments can be reached...



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- Emerging approaches**
- Joint marketing – LAs and operators
 - Low Car Neighbourhood
 - Car club station as part of larger environmental improvement scheme
 - Provide incentives to residents to give up parking permits
 - Implement mini-CPZ to prevent neighbours from filling vacated parking space
 - Reward residents with more attractive street (and higher property values?)
 - Sub-regional procurement, contracts and procedures?



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- The Dream**
- 1/3 of all drivers relying on car clubs
 - 1/3 of all parking space re-allocated to green space, play space, cycle parking, public art, etc
 - Congestion, pollution, carbon emissions, oil wars eliminated
 - Catch a train to any station and drive a car club car the rest of the way
 - “Cats and dogs living together, mass hysteria...”
– Dr Peter Venkman in Ghostbusters

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- How will we get there, nationally?**
- TfL-scale support provided by the DfT to LAs nationally
 - Strong LTP and LDF policies to integrate car clubs with new development and secure revenue stream
 - Promotion of local and rural non-commercial car clubs outside of cities
 - Partnership between LAs, operators, rail companies and other agencies to secure best locations for car club cars

Where to go for help

- Carplus.org.uk – best practice guidance, research, advice for members
- Steer Davies Gleave
- A neighbouring authority with car club experience
- Department for Transport

Questions?

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