



# Car sharing: the London experience

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# Central proposition

Growth in carsharing (CS) in London reflects that the city has become a playground for competing formations configured around transnational operators that offer selected yet generic services

Part I

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# Three key findings

# Key finding (1)

**Informal &  
community**



**For profit,  
home grown**



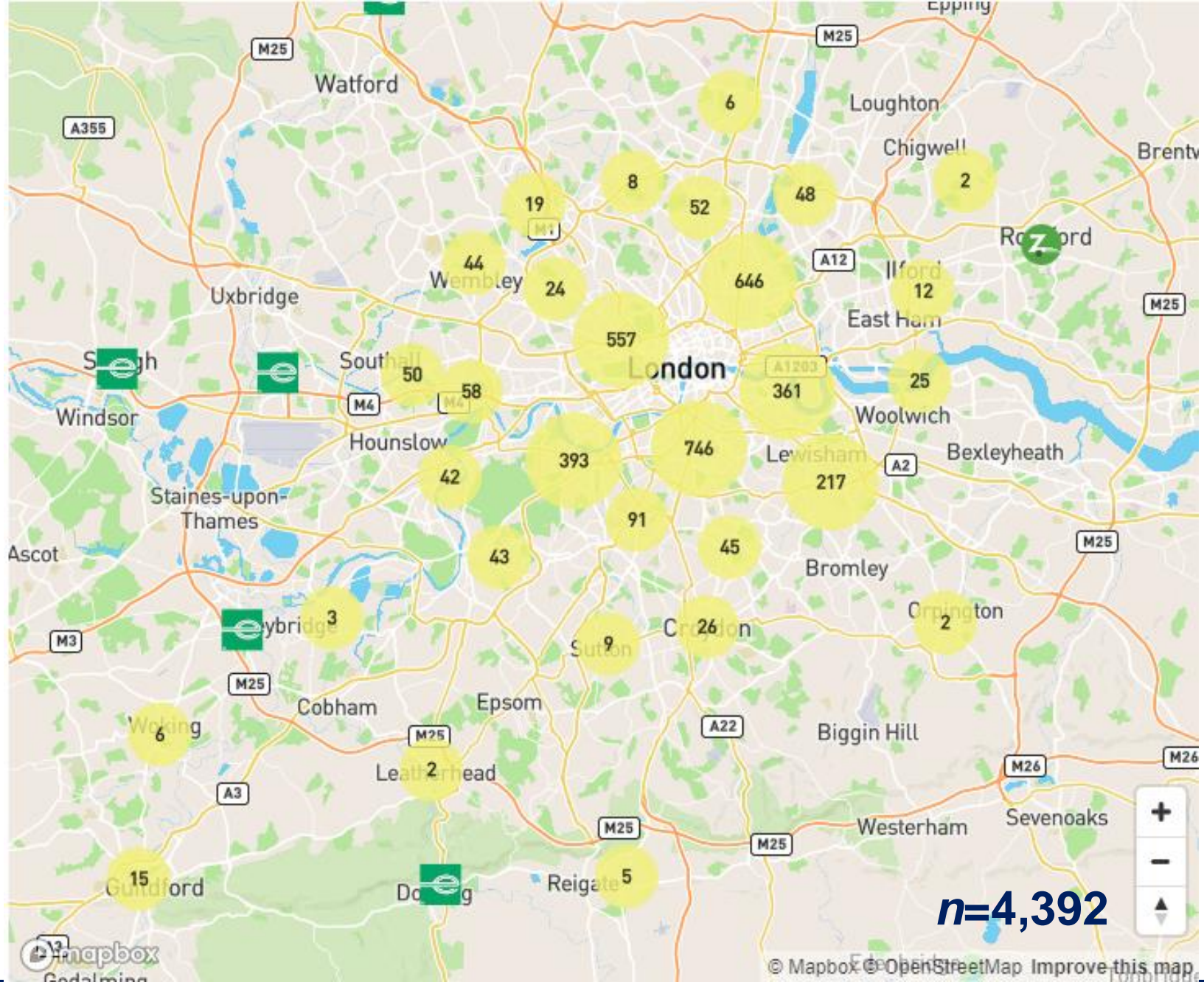
**For profit,  
transnational**

Since mid-2010s:

- Continued quantitative growth
- Dominance of transnational for-profit companies offering b2c and b2b services, mostly in central London
- Limited p2p, community sector and informal CS

## Car sharing operators in London

Fixed bay	Point-to-point	Free floating	Peer 2 Peer
Enterprise car club Zipcar Ubeeqo (Europcar) E-car club (Europcar) Co-Wheels Hertz 24/7	BlueCity	DriveNow Zipcar	EasyCar club HiyaCar Getaround Turo

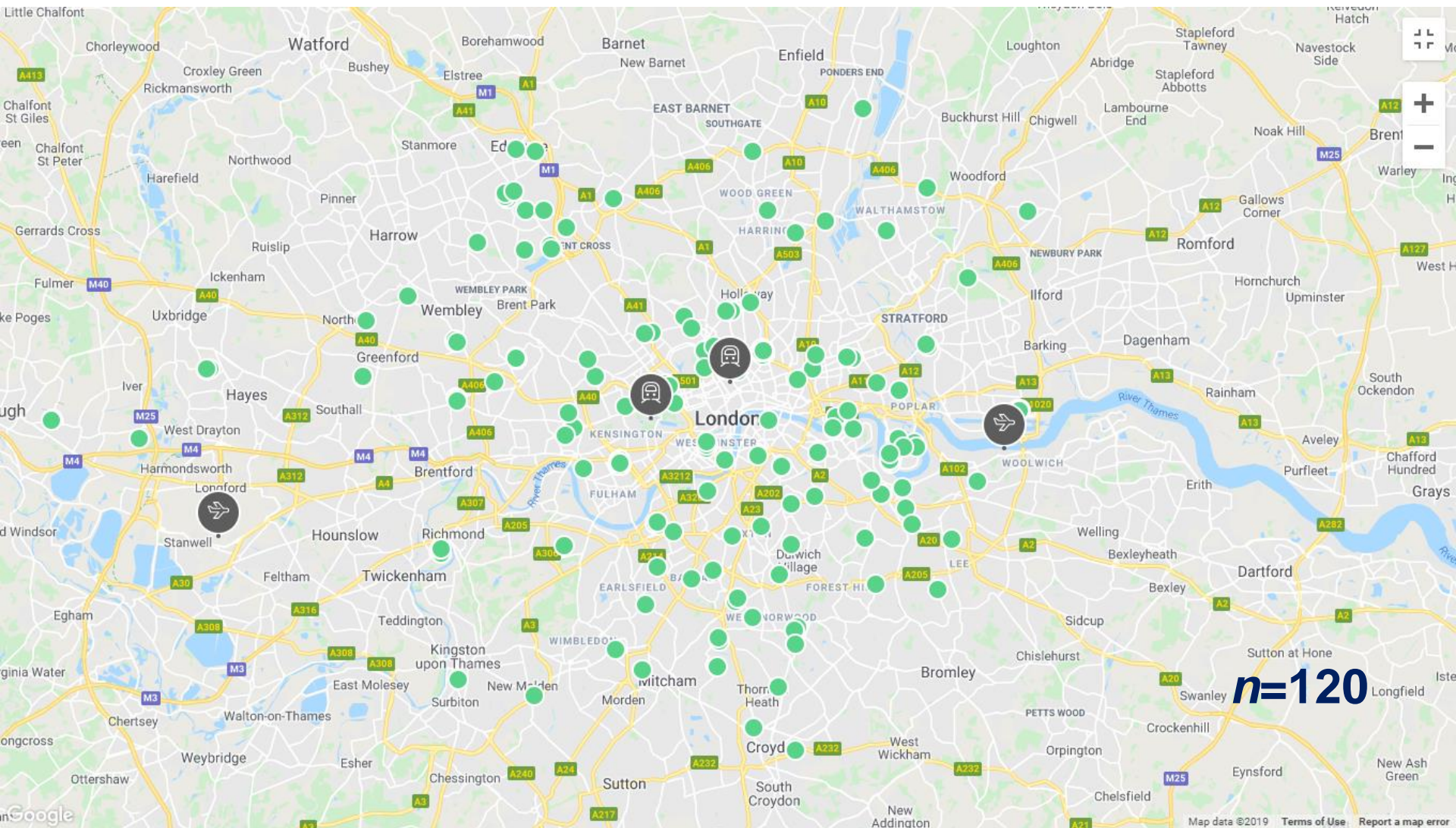


**n=4,392**

Source: [www.como.org.uk](http://www.como.org.uk), 03/11/19



# Turo's offer for 04/11/19-11/11/19



Source: [www.turo.com](http://www.turo.com), 03/11/19

# Key finding (2)

Developments reflect:

- Adaptation to a **harsh environment**: cultural, institutional & financial constraints make CS “really, really hard going” in London & UK
- A **global city effect**: appeal of being seen as operating and successful in London





*The reason there are a number of large operators and it's dominated by transnational companies is because the barriers to entry are significant, you need a lot of resource and a lot of patience to be successful in London. And another reason for the big transnationals is that executives if they're not UK based will look at a map of Europe and go "where do I want to go first? London!" because it's the biggest, huge market, good demographics and that's why so many big car rental firms and OEMs have tried to be here or are here ... To be successful here is not an easy thing to do. So in terms of community [schemes] the resource required to set up a community car club in London would be far too large and [they] wouldn't be able to compete in terms of economies of scale with large operators*



# Limited p2p car sharing

- a) Low cultural acceptance
- b) Limited awareness
- c) Costs on supply and demand side
- d) Age of vehicles (avg ~7-8y) not attractive to users & local government
- e) Contractual limitations built into car lease deals (>85% of UK car sales)

# Key finding (3)

Scaling enabled by CS formations becoming more:

- *Structured*: internally coherent
- *Unspecialised*: independent from environment

This raises questions over local 'response-ability' (Haraway 2008):

- Equity: whose needs are fulfilled, where & when?
- Ability to create local connections across modes and providers – MaaS through several transnational platforms operating in parallel?

Part II

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# Conclusions

# Take-away messages

Car sharing in London has grown considerably, despite rather harsh environment

Growth due to commercialisation, digitalisation, transnationalisation & selection – enhancing consistency & reducing sensitivity to place

Locking in inequity & fragmentation of MaaS?





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# Thank you

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