



IMPROVING CITY LIVING THROUGH SOCIAL AND ENVIRONMENTAL CHANGE

ZIPCAR IMPACT REPORT



About us

Zipcar is the world's leading car-sharing network and has played an influential role in improving city life since 2000. Available in nearly 500 cities and towns and nearly 500 university campuses, Zipcar is driven by a mission: **to enable simple and responsible urban living.**

Zipcar gives members quick, easy, and reliable access to a car without the cost and hassle of owning one. Zipcar has disrupted—or innovated—the

traditional model of car ownership and continues to be an integral part of city living. Independent studies show that Zipcar's model of car sharing is proven to reduce vehicle ownership, freeing up space for people in cities. Zipcar provides communities and members with a socially responsible and sustainable mobility option that supports city livability across the globe.



Contents

4 A message from Zipcar

8 Car sharing: a vital part of city living

16 The social impact of car sharing

22 The environmental impact of car sharing

28 Supporting our communities

34 Looking forward: mobility in a changed world

A message from Zipcar

In 2000, Zipcar envisioned a future where the number of people sharing cars outnumbered the people who personally own one. Twenty years later, Zipcar is the world's leading car-sharing network and is closer to that future than ever before, in large part because of a shared vision with cities and policy makers across the globe.

Due to the impacts of the COVID-19 pandemic, cities are facing tremendous demographic and population changes, and the possibility of increased congestion and pollution. More than ever, urbanites value access and experience over material ownership. In addition, more people are aware of (and interested in) better options to owning a car.

To support this, Zipcar is working with city leaders and policy makers to achieve the goal of long-term, sustainable, environmental, and financial

benefits to our communities, and research has proven that roundtrip car-sharing delivers these indisputable benefits. This report captures Zipcar's impact on the communities we serve and offers tangible proof that round-trip car sharing continues to provide cities and members with significant and distinct benefits.

As cities change, Zipcar will continue to provide urbanites, students, business owners, and city officials access to vehicles without the cost or hassle of owning one. And we're confident our best is ahead of us.

Together with our community of members and partners, Zipcar will continue to drive a sustainable and equitable future for urban living.



Tracy Zhen
President,
Zipcar

Thank you to our community

Zipcar would not be able to drive the future of urban mobility without the partnership of our network of city leaders, who also share the vision of equitable and sustainable urban mobility. Public partnerships are critical to creating a diverse mobility network that works for everyone.

Throughout our history, Zipcar has partnered with city leaders to provide access to transportation—a key driver of economic opportunity and social equity. Together, we recognize that requiring car ownership to reach jobs, health care, nature, and family is inherently inequitable. To truly make progress, we also recognize the need for a more

equitable car-sharing culture and community. This starts with supporting our partners, employees, and the Black, Indigenous, and the people of color communities in the fight against inequity. We believe Black Lives Matter.

We also couldn't enable simple and responsible urban living in our communities without the support of our members. Our members— regardless of age, background, orientation, race or location—recognize that the personal and social benefits of sharing a car outweigh personal car ownership. Thank you for supporting our mission, and working together to push our cities forward.



Celebrating 20 years as the world's leading car-sharing network

2000

Zipcar, Inc. is co-founded by Antje Danielson and Robin Chase, in Cambridge, MA

2002

Zipcar launches in Washington, D.C. and New York City

2004

Zipcar launches Zipcar for Business and Zipcar for Universities

2012

Zipcar launches FleetHub, a car-sharing service for city agencies, with the City of Boston

2011

Zipcar is the first sharing economy, on-demand mobility network to launch an IPO (NASDAQ: ZIP)

2010

Zipcar acquires Streetcar, the largest car-sharing network in the United Kingdom

2009

Zipcar launches its iPhone app

2006

Zipcar launches in Chicago and Toronto, Canada

2005

Zipcar launches in San Francisco

2013

Avis Budget Group, Inc. acquires Zipcar for approximately \$500 million

2014

The U.S. General Services Administration's Federal Acquisition Service chooses Zipcar as their vendor for federal employees in cities nationwide

2016

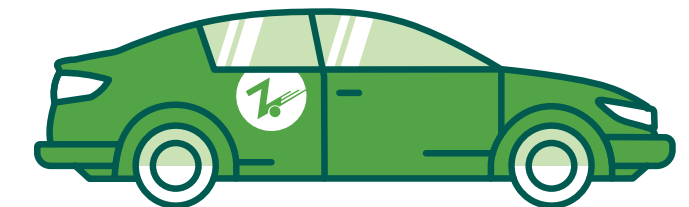
Zipcar's community reaches more than 1 million members

2018

New York City Department of Transportation partners with Zipcar to launch the nation's largest on-street car-sharing program

2020

Zipcar continues to drive the future of transportation as the world's leading car-sharing network, and serves as an essential service during the COVID-19 pandemic



Car sharing: a vital part of city living

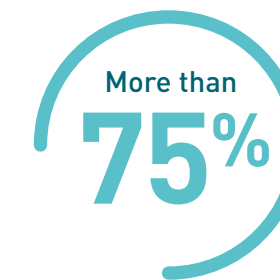
Round-trip car sharing is proven to reduce the number of personally-owned vehicles on city streets, which leads to social and environmental benefits. These benefits include reduced congestion, increased curb space, fewer personal carbon emissions, and fewer vehicle miles traveled.



Zipcar reduces car ownership



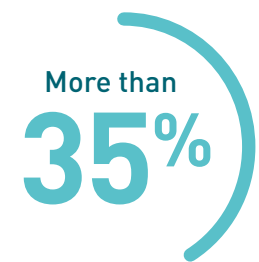
Up to **13** personally-owned cars
are taken off the road
for each Zipcar¹



of Zipcar North America members
do not own or lease a car



of members **postponed**
buying or leasing a car
in 2019 because of Zipcar



of Zipcar North America members
would buy a car if Zipcar disappeared;
14% would buy two or more

1) Elliot, Shaheen, Lidicker/Impact of Carsharing on Household Vehicle Holdings

Zipcar is part of a multi-modal lifestyle

Ziptrips can start in a variety of different ways. Most members walk to their Zipcar, but some take mass transit first, or ride a scooter to the location.



85%

walk



35%

take mass transit



10%

take a bike or scooter

Zipcar reduces single-occupancy trips

The average U.S. vehicle occupancy is

1.54

people per trip²

while Zipcar's is

2.1

people per trip

This means more access to the carpool lane and fewer emissions!

90%

of members **would like to see more on-street Zipcar parking.** Why? Because it's more convenient and easier to find!

In 2019, nearly 60%

of Zipcar members **took transit at least twice a week** and more than 55% took transit at least five times a week.



SPOTLIGHT NYC DOT



“In 2018, for the first time ever, New York City dedicated parking spots on-street and in municipal lots to pilot car share. With thanks to Zipcar, more New Yorkers now can conveniently and affordably access a car instead of taking on the expense and hassles of owning one in the city. Our pilot has already had encouraging results, with the greatest take-up in neighborhoods in the Bronx and Queens. As we continue our pilot, we expect the program will help us meet our goals: reduction in congestion, vehicle emissions and car ownership—along with expanded mobility for thousands of families.”



Commissioner Polly Trottenberg
New York City Department of Transportation

In June 2018, the New York City Department of Transportation and Zipcar launched a car-share parking pilot program, unlocking nearly 230 on-street and municipal lot parking locations for Zipcars across the city. With the shared goal of expanding access to car-sharing, including low and moderate income New York neighborhoods under served by car-sharing services, New York City and Zipcar have been working together to analyze the impact of the pilot program. The Bronx and outer Queens have the highest utilized vehicles in the pilot, indicating that it is filling a previous gap in service demand.

In 2019, Zipcar in coordination with NYC DOT, marked all on-street and municipal lot locations to decrease reports of blocked spaces. Within two months of completion, reports by members decreased by nearly 70% and helped raise further awareness for car-sharing as a mobility option within the city’s neighborhoods.

In 2020, Zipcar became the only car-sharing network to participate in the New York City pilot program.

NYC DOT pilot fast facts

70k

trips in the
first year³

10hrs

average
reservation time

68mi

average
distance

Each month, one shared car **serves an average of 15 unique users**, proof that you don’t need to own a car to access one.

85%

of NYC members do
not own or lease a car
after joining Zipcar

3) Carshare Parking Pilot, First-Year Progress Report.
New York City Department of Transportation. January 2020.

Fewer cars on the curb equal more free space

Personally-owned cars sit idle about 95% of the time⁴. Reducing personal car ownership frees up curb space that can be better used by people and the shared transportation options that move them more efficiently.

4
parking spaces =
average apartment⁵

10
parking spaces =
1 tennis court

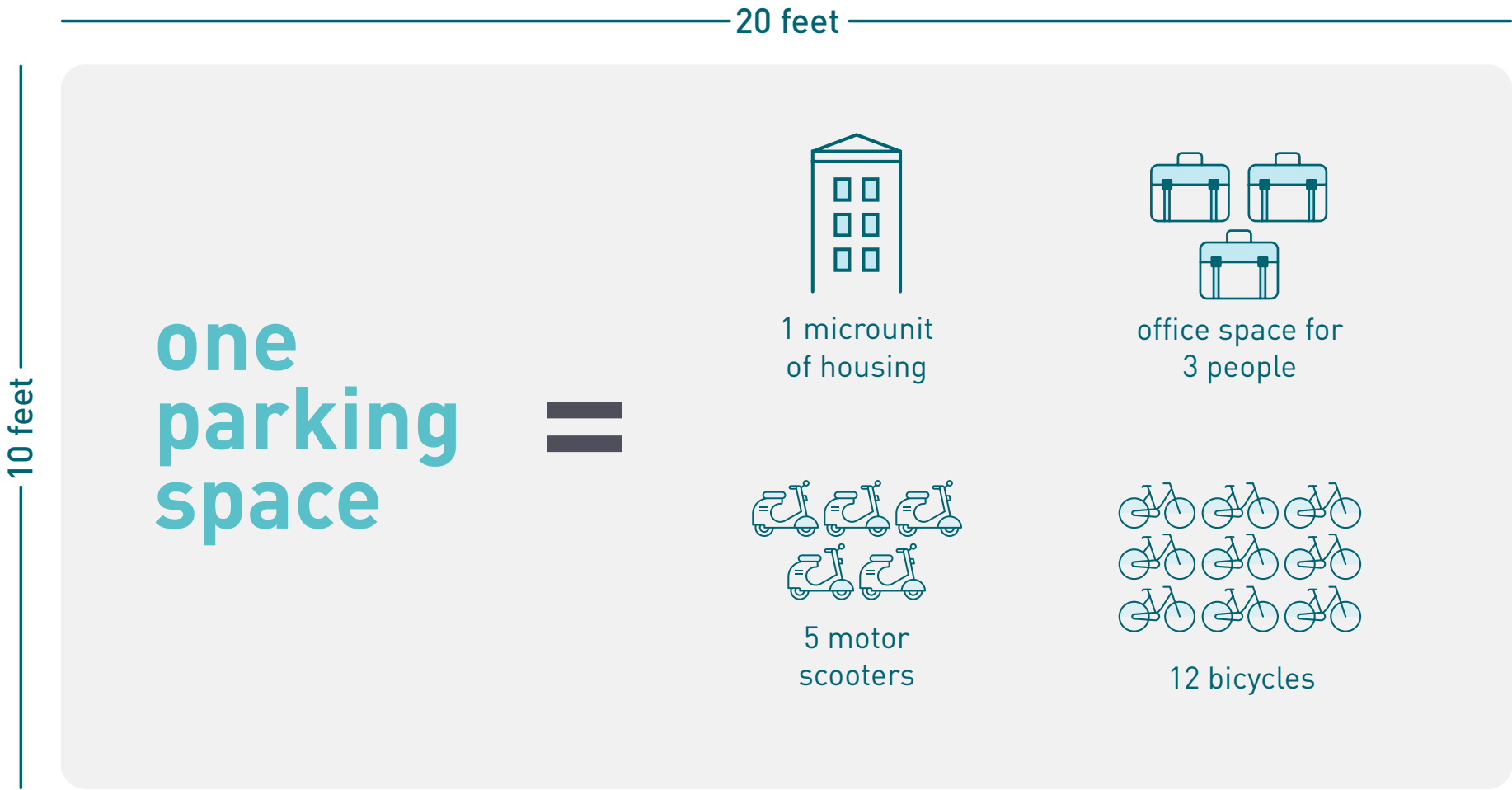
13
parking spaces =
150 bicycles

20
parking spaces =
9 subway cars

40
parking spaces =
18 transit buses

4) Shoup, Donald. The High Cost of Free Parking. Routledge; 1 edition (June 21, 2011)

5) Kolomatsky, M/How Big Is an Acre, Anyway?



The social impact of car sharing

Who are Zipcar members? Zipcar members, aka “Zipsters”, are as diverse as the neighborhoods in North America that we serve.



50%

Male

48%

Female

1%

Non-Binary/
Third Gender

Nearly
50%

identify as BIPOC.
We're proud to support
this community.

35

average age of
Zipcar members

30%

are university
or college students

Nearly
50%

live with a
spouse or partner

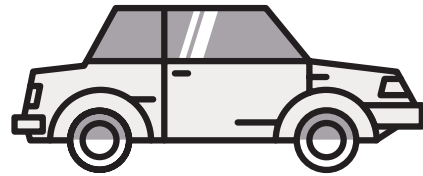
Over
80%

live in
multi-family
housing

39%

have a household income
lower than the U.S. median
household income of \$61,000

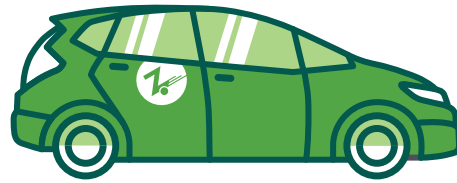
Zipcar provides affordable access to a car



Average cost of
owning a car

Car payment ⁶	\$774
Parking	\$180

Total **\$954/mo**



Average cost of
Zipcar

Average trip costs ⁷	\$314
Membership	\$7/mo (\$70/year)
Parking	\$0

Total **\$321/mo**

Zipcar members save about
\$633
per month
compared to car owners

\$7.6 billion
in total Zipcar member **savings per year**
over the cost of owning a car⁸

Because of Zipcar

64%
of members have an
improved quality of life

40%
of members can **affordably**
reach essential destinations
like school and work

60%
of members **feel**
empowered to be themselves
and move independently

6) AAA "Your Drive Costs, How Much Are You Really Paying to Drive?" 2019
7) Monthly average for Zipcar members
8) Total savings: average monthly savings (\$633) X 12 months X 1 million members. Source: 2019 NATS and AAA



SPOTLIGHT District DOT



“The inaugural Open Streets DC was a huge success. Working with our local partners like Zipcar, we created an opportunity for DC residents to experiment with the idea of streets completely open to people using alternative forms of transportation instead of single occupancy vehicles.”



Director Jeff Marootian
District DOT

PARK(ing) Day September 20, 2019

Since 2005, PARK(ing) Day has been transforming curbsides across the world from on-street personal vehicle storage to beautiful mini parks. PARK(ing) Day brings to life the future Zipcar has been working towards for twenty years—a city with fewer cars and more space for outdoor fun. We made it a reality in Washington, D.C. by bringing a campsite to life in the middle of an urban streetscape.

Washington, D.C. Open Streets October 5, 2019

Mayor Muriel Bowser and District DOT Director Jeff Marootian hosted DC’s inaugural Open Streets event, closing three miles of Georgia Avenue to motor-vehicle traffic, creating space for people to walk, bike, and celebrate. Zipcar has long-prioritized relationships with local governments and shares the District’s vision for opening more space for people, bikes, and the community by reducing personal vehicle ownership. As an early supporter of DC’s Open Streets, Zipcar joined in the fun alongside Mayor Bowser.



The environmental impact of car sharing

Zipcar is driven by a mission: **to enable simple and responsible urban living.** Car sharing provides a socially responsible, sustainable option that supports local communities and the global environment.



Each Zipcar serves
50-80
members

Car-sharing members
reduce their CO₂
footprint by up to
1,600
pounds per year⁹

Roundtrip car-sharing
members drive
40%
fewer miles
than they did before
joining Zipcar¹⁰

If car sharing weren't
available, members
would drive
26%
more than
their current levels¹¹

Car sharing =

fewer cars, less parking, cleaner air, and more
land for people, housing, and open space.

9) Shaheen/Greenhouse Gas Emissions
10) Shaheen/Impact of Carsharing on Household Vehicle Holdings
11) Shaheen/Impact of Car sharing on Public Transit and Non-Motorized Travel

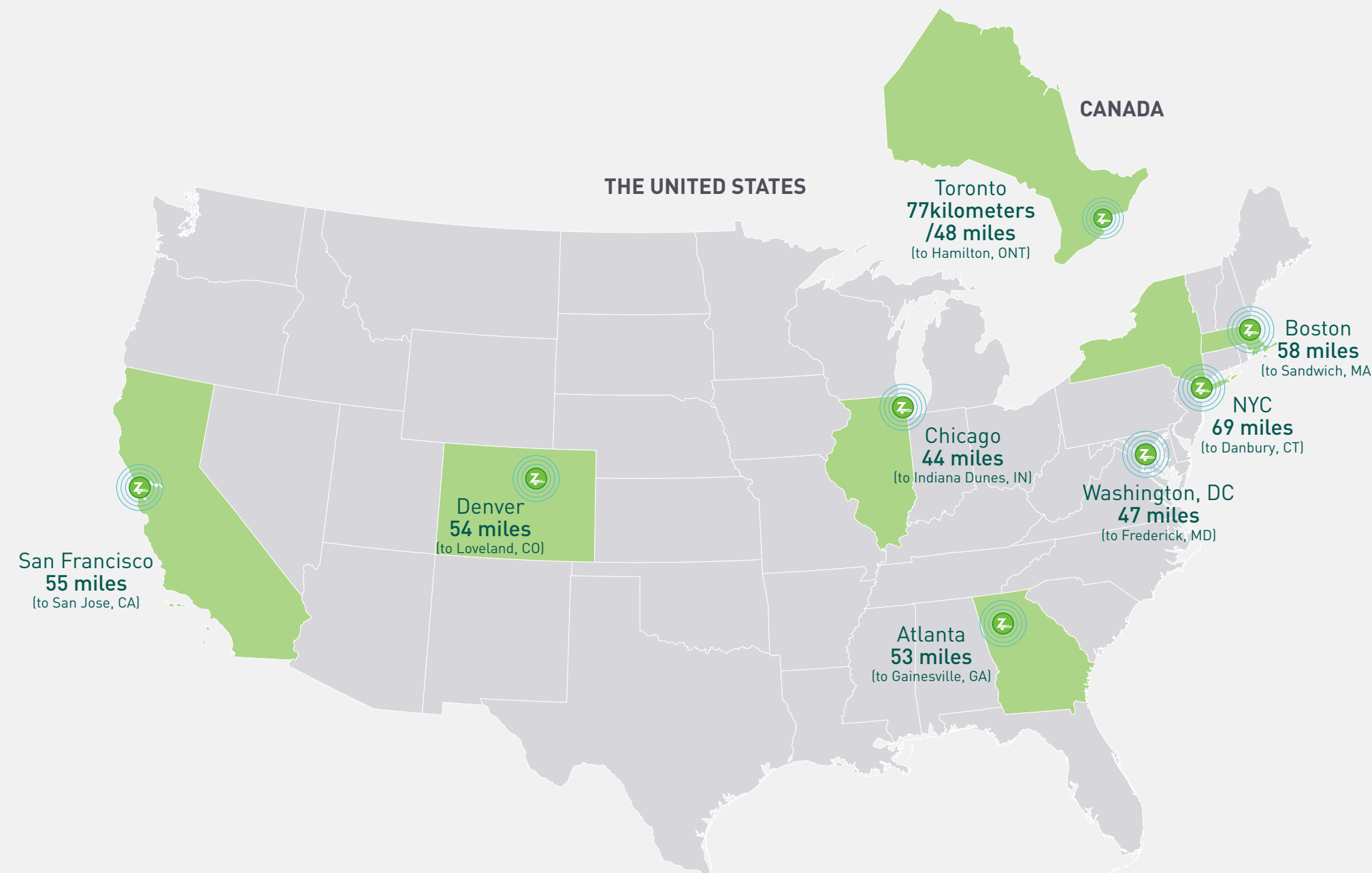
Zipcar's impact on congestion

Our members rely on public transit, walking, and biking for shorter trips and turn to Zipcar for longer, purpose-driven trips that require a vehicle. For those trips, Zipcar provides access to a vehicle without the cost and hassles of owning one.

Across
North America,
the average Ziptrip is
52mi
and nearly 9 hours

Zipsters take a variety of purpose-driven trips, but the four most common are:

- Out-of-town trips
- Visits with family and friends
- Grocery shopping
- Errands





SPOTLIGHT Our Community CarShare

“Zipcar shares the vision with public partners that living car-lite makes our cities less congested and more sustainable. Zipcar offers long-term social, environmental, and financial benefits, and as an integral part of the District’s Our Community CarShare program, that offers low-income Sacramento residents access to a free, zero-emission mobility option.”

Steffani Charkiewicz
Air Quality Engineer,
Sacramento Metropolitan Air Quality Management District

Zipcar, in partnership with the Sacramento Metropolitan Air Quality Management District, the Sacramento Housing Authority, and Breathe California, launched the Our Community CarShare (OCCS) electric car share program in 2017 with seven electric vehicles. With the goal of increasing access to zero-emission vehicles for low-income Sacramentons, OCCS is a successful partnership model that has enabled clean, shared mobility.

Building on the initial success of this first-of-its-kind program, Zipcar is planning to grow its presence in communities across Sacramento. More importantly for the first time, both Housing Authority residents and Zipcar members will have access to the EVs and therefore clean mobility across the city.

Our Community CarShare fast facts

Nearly
600
total members

nearly
14,500 **34,200**
total trips hours reserved

more than
213,000
zero-emission miles driven

at least
6,700
gallons of gas saved¹²

12) Note: estimated 32mpg combined of comparable ICE vehicles), total miles driven/32 mpg

Supporting our communities



Zipcar is proud of our diverse global community

More than
1 million
members worldwide
serving nearly 500 cities and towns,
and nearly 500 universities

12,000
vehicle fleet

4,000
business partners

Nearly
30
non-profit partners
in 2019

67%
of Zipcar members
have been members for
more than one year

Zipcar's university communities

In 2004, Wellesley College became the first in the nation to provide Zipcars to those under 21 years of age. Since then, the Zipcar for University program has expanded dramatically; nearly 500 university campuses across North America enjoy all the benefits of a car on campus without the cost and hassle of owning one. Students, faculty, staff, and local residents have access to a car when they need one for errands, commuting, weekend getaways, and everything in-between. Roughly 30% of Zipcar members are students, and because of their membership, 40% of those students are less likely to buy a car. Fewer cars on campus means more space for bike lanes and green quads.



SPOTLIGHT Harvard University

“For twenty years, Harvard has had a great relationship with Zipcar. We’re proud to be one of the very first institutions to partner with Zipcar and to have a significant Zipcar presence on campus. Every time we produce an annual report, apply for an award or we want to demonstrate our commitments to sustainability and greenhouse gas reductions, Zipcar is a big part of how we let people know that we are committed, and we are focused on a more sustainable future.”

Benjamin Hammer
Associate Director of CommuterChoice, Transportation
Demand Management & Sustainability,
Harvard University

Since 2001, Harvard University and Zipcar have partnered to bring on-demand transportation options to students, faculty, staff and the Cambridge community.

Recently, Harvard announced its commitment to become fossil fuel-free by 2050 and an interim goal to become fossil fuel-neutral by 2026, with Zipcar playing a large part in meeting these goals. Car sharing is promoted as a sustainable transportation option, enabling Zipcar members to reduce their CO₂ footprint by up to 1,600 pounds per year⁹. With Zipcar’s presence on campus, an estimated 650 personally owned vehicles are eliminated from Cambridge streets, helping Harvard meet its goal of reduced greenhouse gas emissions.

Zipcar's business & non-profit communities

Zipcar for Business gives organizations of all kinds the convenience of on-demand driving without the overhead associated with owning a fleet of cars. With the flexibility to have one or hundreds of employees on a Zipcar for Business account, businesses have the freedom to expand their mission and bottom line, knowing they have access to vehicles in nearly 500 cities and towns across North America.



SPOTLIGHT New Yorkers for Parks



“Zipcar truly makes our distributions possible in not only transporting all of the bulbs and distribution materials on the day of distribution but also provides enormous help at the start and end of each Daffodil Project season to bring all of our tools to our storage unit for the winter.”



Michelle Velez
Director of Development,
New Yorkers for Parks

With a donation of memberships and driving hours from Zipcar, New Yorkers for Parks has been able to drive its mission forward through its annual Daffodil Project, a program launched in 2001 as a living memorial to September 11.

With Zipcar's help, New Yorkers for Parks has been able to multiply its small staff across the far reaches of the city. Together they have made NYC brighter by delivering 500,000 daffodil bulbs free of charge to community groups and gardens, schools, houses of worship, housing developments, and citizens who want to beautify their neighborhoods.

In 2019, nearly 18,000 adult volunteers and 29,200 youth volunteers planted bulbs across the city while a team of Zipcar employees planted 700 bulbs at New York City Housing Authority's Davidson Houses in the Bronx. Throughout the year, Zipcar proved essential for the teams to transport bulbs from borough to borough in an easy and effective way.

Looking forward: mobility in a changed world



No one imagined the drastic changes the COVID-19 pandemic would bring to city life; it was turned upside down, with mobility being no exception. Our ability to move about efficiently, affordably, and freely has been affected more than most other areas of life. As a result, access to a vehicle is more important than ever for those who need to get groceries, care for loved ones, and take any other essential trips while social distancing. The outcome? A renewed emphasis on car ownership that creates more inequities in our communities.

This is particularly true in the current economic climate, with over 13.6 million Americans struggling to find work¹³. Owning a car shouldn't be a requirement to get to work or visit family, and access to a car shouldn't be limited to those who can afford to own one. A recent survey from Zipcar and research firm Engine Insights found that four out of five urban dwellers say it's now essential to have access to a car. Additionally, 41% either purchased a vehicle in the last six months or are considering it, in part due to the pandemic¹⁴.

Beyond the social impacts, the lasting effects of car ownership on our environment and the urban landscape are also top-of-mind for Americans. Of those surveyed, 63% are concerned about the impacts of traffic congestion on the future of city life, with nearly 30% very or extremely concerned. If nearly half of the driving age population in U.S. cities purchases a vehicle, the environmental impact will be catastrophic. That's nearly 136 million new vehicles on our city streets¹⁵. What if we could change the way cities work for the better? Being part of a community means acting as one, and car sharing encourages just that. That's where Zipcar comes in—we help everyone trade individual ownership for collective sharing.

The only long-term, sustainable mobility solutions for our cities are ones that enable affordable access, maximize the use of shared space for all, and make our streets safer, less crowded, and less polluted.

We're at a pivotal moment to make urban mobility more responsible, equitable, and sustainable. By owning less, we all have more.

13) Bureau of Labor Statistics unemployment numbers, 2020

14) Survey of 610 U.S. adults from urban communities, Aug. 26-30, 2020

15) U.S. Census Bureau population numbers, 2019



zipcar.com/impact
cities@zipcar.com



#OwnLessHaveMore



Methodology

Zipcar-specific data referenced herein was collected as part of Zipcar's 2019 North American Transportation Survey, an annual email survey conducted in December 2019 with a sample size of nearly 18,000 respondents across North America. Industry-specific data referenced herein was made possible by our partners at the Transportation Sustainability Research Center at the University of California and credible industry parties.