Residential Mobility 2.0

A Tenant-Exclusive Car Rental Subscription Service for Managed Residential Buildings in the UK

Consultancy Report for Enterprise Mobility

BUSI1319 Final Year Consultancy Project

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Executive Summary

This consultancy report evaluates the commercial, behavioural, and implementation feasibility of Residential Mobility 2.0, a tenant-exclusive car rental subscription service proposed by Enterprise Mobility for adoption into managed residential buildings across the United Kingdom. Enterprise Mobility, operating 1.7 million vehicles in nearly 100 countries, is facing competitive saturation in traditional rental markets and is seeking a scalable B2B2C revenue stream to make use of its existing fleet infrastructure to serve the 14 million UK renters increasingly disinclined toward private car ownership.

Drawing on a 55-respondent quantitative survey of young urban renters and secondary case study analysis of international embedded mobility pilots (Jaguar–Moda Living, Hyundai Mocean Utrecht), the research detects healthy market receptivity: 75% of respondents indicated they would be likely or very likely to use the service (mean adoption = 4.18/5.0, SD = 0.99), with 93% willing to pay a monthly access fee. The mean WTP stands at £32.05/month (SD = £13.04), with hourly rates clustering at £7–£8.50 and a daily cap of £35–45. Comprehensive insurance with zero excess and dedicated on-site parking stand out as the highest-priority features. Regression analysis verifies that adoption intent and WTP are uniformly strong across income and car ownership segments (all $p > 0.05$), pointing to broad market appeal (Appendix D).

Key Findings. The survey reveals strong and broad-based demand. 75% of respondents indicated they would be likely or very likely to adopt the service, with adoption intent uniform across income and car ownership groups (all $p > 0.05$). At the same time, 93% expressed willingness to pay a monthly fee, with the mean sitting at £32.05/month. Crucially, the service delivers a dual value proposition. For tenants, it reduces fixed car ownership costs such as insurance, maintenance, depreciation, and fuel, enabling annual savings of £3,000 to £6,500 compared to private ownership. For property developers and landlords, it operates as a premium amenity bundled into rent, justifying higher rental prices and strengthening occupancy and tenant retention. It should be noted, however, that the sample is largely student-based (51%), which may limit the generalisation of these conclusions to the broader renter population.

Key Recommendations. The report proposes a phased implementation strategy. In the short term (0–12 months), Enterprise should pilot the service to 3–5 buildings in inner London,

selected on the basis of limited existing parking, with a young resident profile, and reasonable public transport access. The base subscription should sit at £30/month, with a premium tier at £45/month introduced during the medium-term optimisation phase (12–24 months). Success should be measured through utilisation rates, subscriber conversion, and quarterly shifts in car ownership. Long-term national rollout (24–60 months) should target 50+ sites, including student accommodation, and should be supported by engagement with UK planning authorities on parking reduction incentives modelled on the Vienna approach.

1. Introduction

1.1 Research Background

Enterprise Mobility is a global leader in transport and car rental, serving customers in nearly 100 countries with a fleet of over 1.7 million vehicles. In the UK, you can enjoy hourly car rentals with Enterprise Car Club, as well as fleet leasing and vehicle subscription options. Despite this extensive portfolio, Enterprise has not yet embedded its mobility services directly within residential environments, a considerable strategic gap given current market trajectories.

According to the Ministry of Housing, Communities and Local Government (2024), the UK is home to 8.6 million renters, who are disproportionately concentrated in urban centres where car ownership is on a strong decline. London itself, 42% of households are car-free; on the other hand, the UK car-share business tripled from 354,000 in 2019 to 873,000 by the end of 2024 (Jolly , 2025). Oliver Wyman Forum (2024) forecast that personal vehicles will fall from 66% to a percentage of 50 by 2035 due to the development and improvement of shared mobility and public transport. Having said that, even the company for which this project is made affirmed that Gen Z and Millennials have a preference for flexible, app-based transport over traditional car ownership (Enterprise Mobility, 2025). It is clear that change is happening, reflected in urbanisation, sustainability priorities, fuel costs, and shifts in generational behaviour, which highlights a significant market gap that can be filled by embedded mobility business that targets residential sector.

1.2 Company Challenge

Enterprise Mobility has limited chances for differentiation amid the rapidly changing shared mobility sector. Similar to other companies, it might encounter market saturation in the rental car industry because of self-driving vehicles, which leave little room for differentiation in this quickly changing shared mobility market (Tu and Xu, 2024). The challenge boils down to identifying and piloting a scalable, systematic revenue stream that makes the most of Enterprise's existing fleet and service infrastructure while reaching new customer segments, above all those who rent in crowded urban areas. The proposed solution, "Residential Mobility 2.0," sets out a location-restricted, tenant-only car rental subscription integrated into managed apartment blocks. This B2B2C model would open up a new revenue channel for Enterprise while giving property managers a premium amenity to attract and hold onto residents.

1.3 Research Questions

RQ1: How do embedded car-sharing services influence residential car ownership and modal shifts in urban apartment complexes?

RQ2: What operational, partnership, and willingness-to-pay design factors contribute to the success and scalability of tenant-exclusive mobility services?

1.4 Research Aim and Objectives

This project intends to asses the commercial, behavioural, and functual feasibility of launching a tenant-exclusive car rental subscription within managed residential buildings in the UK. The objectives are to:

(i) Analyse how embedded mobility services shape car ownership and transport behaviour.

(ii) Examine economic and operational models drawn from international case studies.

(iii) Identify success factors through primary survey data and secondary stakeholder evidence.

(iv) Develop a pilot implementation strategy for 3–5 UK residential sites.

2. Literature Review

This chapter critically reviews the theoretical and empirical literature relevant to Enterprise Mobility's Residential Mobility 2.0 concept. It is all divided in five areas, each mapped directly to the research objectives: Urban transport trends and modal shift evidence; the B2B2C partnership model; the impact of embedded mobility about car ownership; service design and success factors; and tenant willingness-to-pay for mobility amenities. The review concludes by identifying the specific research gap this project addresses.

2.1 Theoretical Background

The business model proposed to Enterprise Mobility can be positioned within Ansoff's (1957) growth matrix as a market development strategy (Figure 1): Applying an existing product (shared vehicles and fleet management) to an entirely new customer segment (residential tenants). This is distinct from product development or expansion, in which Enterprise's core competency, namely fleet procurement, insurance, maintenance, and digital booking infrastructure, remains unchanged. The strategic logic corresponds to Ansoff's observation that market development minimises product risk while exploiting underserved demand. However, the framework has an important limitation: It considers market entry as an all-or-nothing decision and does not depict the complexity of partnerships in a B2B2C model, where the Enterprise must handle relationships with property developers and tenants at the same time.

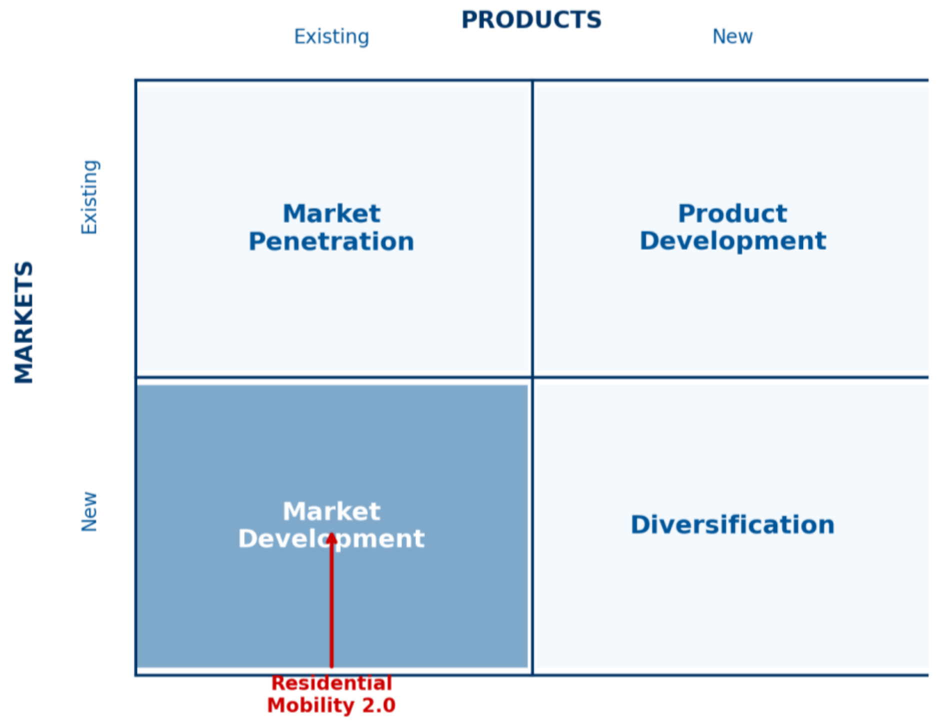

Figure 1: Residential Mobility 2.0 within the matrix

Moving into the Residential Mobility 2.0, as visible in Figure 2, it all operates via a B2B2C value chain model: Enterprise will have to partner with property managers (the intermediary), who will in turn roll out the service to tenants (the end consumer). This structure is gaining ground in embedded finance, where intermediaries bundle third-party services to boost retention and revenue per unit (Heldt et al., 2025). The main advantages that Enterprise Mobility can get are based on the distribution effectiveness: Enterprise starts to gain access to a concentrated, pre-qualified user base without considering the customer acquisition costs of direct-to-consumer marketing. On the other hand, the key risk for this model is to convince the owner of the building to create and therefore invest in physical infrastructure in order to allocate parking spaces. Another risk is explaining that parking integration must begin before construction, and guaranteeing the mobility offering is properly integrated into lease terms and conditions.

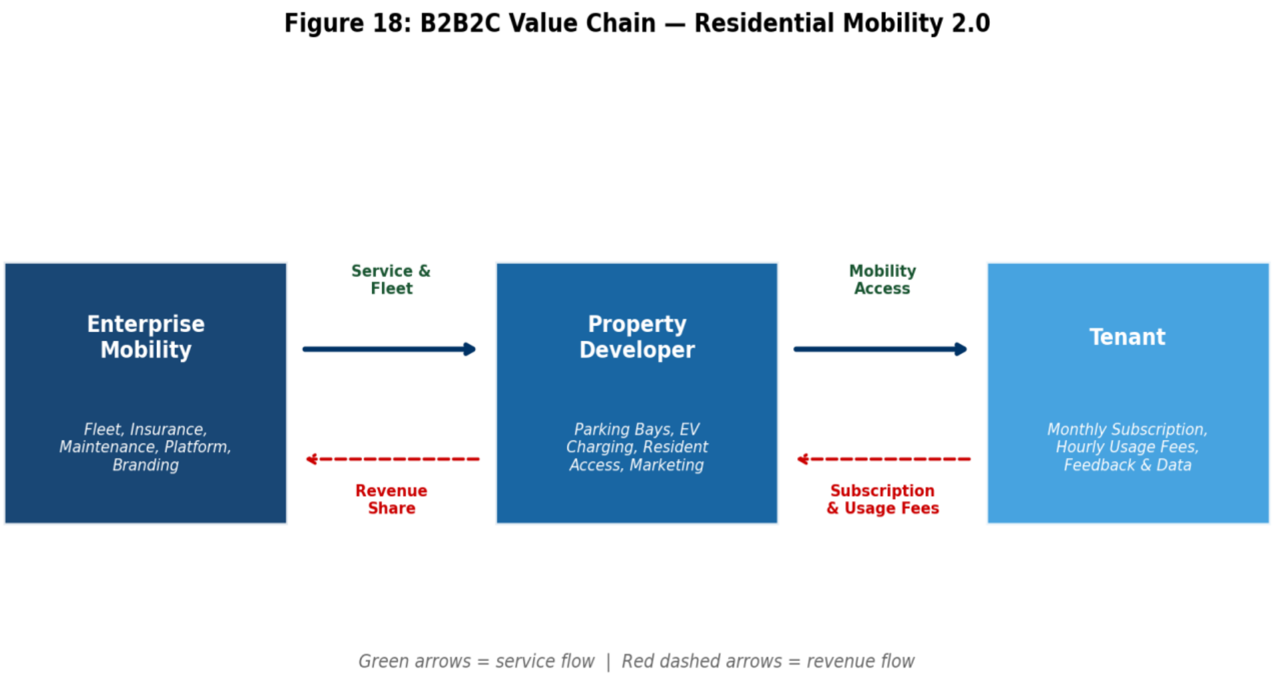

Figure 2: B2B2C value chain. Source: (Author's Own)

Additionally, Bardhi and Eckhardt (2012) define access-based consumption as transactions where no transfer of ownership takes place; their car-sharing research shows that urban consumers increasingly treat cars as functional tools rather than identity markers, showing a big market opportunity. Botsman and Rogers (2010) frame this as part of a wider "collaborative consumption" movement, where underutilised assets are redistributed via technology platforms. Residential Mobility 2.0 fits perfectly within this paradigm: The enterprise's fleet is inactive during off-peak hours, with the residential building acting as the distribution point. What makes the B2B2C model particularly powerful, however, is that it goes beyond simple asset redistribution through aligning the incentives of three stakeholders: The mobility provider secures a specific user base, the developer gains a premium amenity that justifies higher rents and most importantly, it differentiates its building from its competitors and consequently gains more market share. Finally, the tenants gain affordable, ready-to-go transport. These three aspects are what could differentiate this idea from traditional car-sharing platforms normally offered by companies such as Zipcar, which primarily operate in a B2C model without any B2B partnerships.

The academic literature on integrated mobility concepts provides a solid theoretical basis. Stiebe et al. (2025) defined IMCs as combined transport packages normally used in residential areas, which include shared vehicle cycling facilities and transit passes, usually implemented to reduce parking requirements. Therefore, it demonstrates that the IMC's idea, which is centred on buildings, has a behavioural impact on users because they do not feel the need to own a car, and consequently, they tend to drive less. This confirms the literature's assertion that the environment in which people live can actually reshape their transport behaviour. Ranjan and Sinha (2025) conducted a systematic review of transport mode selection, discovering that costs and proximity of alternatives are the elements that shift a person away from owning a private car. What makes this conclusion particularly relevant for enterprises is that the decision not to own a car is not driven by ideology or environmental values but is more pragmatic; for example, if a shared vehicle is more convenient and cheaper than owning one, people are more inclined to use it.

2.2 Residential Mobility and Urban Transport Trends

Urban car ownership has always grown year by year, but now it is facing a period of structural decline across major European cities (The Guardian, 2025). Shaheen and Cohen (2013) analysed the market and discovered that most of these changes are mainly due to lower costs, increased environmental awareness, and smartphone-based bookings. As mentioned before, the global shared mobility market is projected to grow at a compound annual rate of 8.5% between 2026 and 2033, driven by rising urbanisation and sustainability pressures (Market Research Intellect, 2025). Internal research by Enterprise shows that Gen Z uses ride-hailing and car rental services more than any other group.

Nonetheless, Barreira et al. (2023) pinpoint that attitudinal preferences do not automatically translate into behavioural adoption; the intention-behaviour gap is thoroughly documented in transport research. Albeit, what sets successful embedded mobility apart from schemes that fail to reach critical mass is the design of the service: Pricing, availability, insurance simplicity, and how tightly the service is united into the resident's daily routine (Sprei et al., 2020). This insight sits at the heart of the present study.

2.3 B2B2C Embedded Mobility Partnerships and Economic Feasibility

Some international pilots establish the foundation for the Residential Mobility 2.0 concept. Jaguar Land Rover, in fact, partnered with Moda Living to give residents exclusive access to all-electric I-PACE vehicles at select UK Build-to-Rent developments, bundling insurance, charging, and maintenance into the service (Jaguar, 2023). Hyundai piloted its Mocean car-sharing platform at a residential development in Utrecht, offering month-to-month EV access (Hyundai, 2023). Both share the same takeaways of Enterprise's proposal: Tenant exclusivity, all-inclusive pricing, on-site EV fleets, and digital-first booking. However, neither has published long-term utilisation or financial performance data, leaving a considerable empirical gap. Although it is clear that even big brands are understanding that the mobility market offers new opportunities due to numerous factors previously cited.

Corinaldesi et al. (2022) show through simulations that residential car-sharing is practical when it is used enough, which depends on how densely buildings are packed and how many people are using it. Rivasplata et al. (2012) find that linking car-sharing to planning regulations (reduced parking requirements) substantially improves the business case by cutting developer capital expenditure. Sprei et al. (2020) confirm that developments with low parking ratios can reallocate space for higher-value uses. This evidence implies that Enterprise's strongest pitch lies with new-build, Build-to-Rent developments, where parking decisions are still on the table.

2.4 Impact Regarding Car Ownership and Behavioural Evidence

The evidence shows that car-sharing usually reduces how many cars people own. Engel-Yan and Passmore (2013) found that smaller-scale car-sharing at the building level lowers car ownership by 10–15%. Le Vine and Polak (2017) reported that 37% of London carsharing users changed their ownership decisions, with 83% avoiding a purchase. Kopp et al. (2015) show that flexible car-sharing leads to measurable reductions in private car holdings.

Heldt et al. (2025) studied Berlin's WATERKANT development and found a significant decline in household car ownership alongside increased sustainable travel. Andrea et al. (2024) document similar outcomes across Germany, Switzerland, and Austria, noting that Vienna's Haus der Zukunft cut parking to 30% of the legal minimum by offering on-site EVs. These data reinforce the hypothesis that embedded car-sharing produces meaningful ownership reduction.

2.5 Design Features, Success Factors, and Policy Context

Sprei et al. (2020), in addition, demonstrate that three conditions are necessary in order to have high utilisation: Dedicated and visible vehicle parking, seamless digital booking, and all-inclusive pricing. Andrea et al. (2024) add that resident-focused marketing during the onboarding process is necessary. Shaheen and Cohen (2013) further stress that smartphone-based booking and keyless access act as critical enablers. The Jaguar–Moda and Hyundai–Mocean pilots tick all of these boxes, suggesting that the real verge for success lies in stripping out the hostility points (insurance complexity, availability uncertainty, actual distance from the vehicle) that put off potential users.

On the policy side, as previously mentioned, Vienna reduced legal parking provision if they offer shared vehicles on-site (The Guardian, 2025). The UK do not have this; nonetheless, Transport for London's car club strategy encourages planning concessions for developments with car-sharing (TfL, no date). If UK local authorities follow Vienna's lead, developers will have a financial incentive to team up with mobility providers, which would considerably strengthen the commercial terms of the B2B2C arrangement and therefore increase the profitability of this business idea.

2.6 Tenant Willingness-to-Pay for Mobility Amenities

Zalejska-Jonsson et al. (2020) find that tenants assign a measurable value to sustainability initiatives when they are seen as personal rather than purely environmental. This dual-benefit framing, where a mobility service is both "green" and practically convenient, directly reflects this consultancy project.

A 2025 Rently survey found that 65% of tenants consider smart features desirable and would pay a premium (Rently, 2025), while Samsung's (2024) research shows consumers will pay a 7.7% premium for smart homes. Although all of these relate to technology rather than mobility, they establish a behavioural precedent: Renters, above all Millennials and Gen Z, are willing to pay for bundled convenience services that boost their dwelling experience. However, it is not completely clear in the current research whether people are willing to do this for a regular mobility subscription instead of a one-time upgrade, which is what this study's willingness-to-pay data looks at.

2.7 Research Gap

Despite growing evidence on the impact of car-sharing and the emergence of B2B2C residential pilots, no UK-specific empirical data exists on tenant WTP for a 24/7, tenant-exclusive car-sharing service. Existing estimates focus on general car-sharing or technology amenities, not on the specific package proposed in this business idea. Furthermore, old operational data from the Jaguar–Moda and Hyundai–Mocean pilots remains unpublished, meaning there is no verified evidence on whether these models achieve sustainable utilisation or financial performance over time.

Three specific gaps stand out. Firstly, existing WTP research in the residential context, such as Zalejska-Jonsson et al. (2020) and Rently (2025), measures willingness to pay for one-off technological upgrades or general sustainability features rather than a recurring mobility subscription with monthly, hourly, and daily pricing components. Secondly, the behavioural evidence on embedded car-sharing, including the studies by Heldt et al. (2025) and Andrea et al. (2024), comes from German, Swiss, and Austrian developments. These markets have different regulatory frameworks, parking norms, and public transport coverage, making direct application to the UK context unpredictable. Thirdly, no research has explored how feature preferences such as insurance options, parking facilities, and vehicle types influence WTP within a tenant-exclusive context. Understanding which service attributes drive willingness to pay is essential for designing a commercially viable pricing model.

This project fills that gap by collecting the first UK-specific primary data on WTP across three pricing dimensions, attribute importance rankings, and adoption likelihood for an embedded residential mobility service. In doing so, it provides Enterprise Mobility with an evidence base that the existing literature does not offer.

3. Methodology

3.1 Research Design

This study follows a structured research design grounded in Saunders et al. (2019) "Research Onion" framework (Figure 3). The remotest layer is the research philosophy, which is pragmatist: The study produces findings and explains what to do next, such as recommendations, changes in strategy or behaviours. A pragmatist attitude permits mixed methods, making it the most fitting philosophy for a consultancy-oriented project (Saunders et al., 2019).

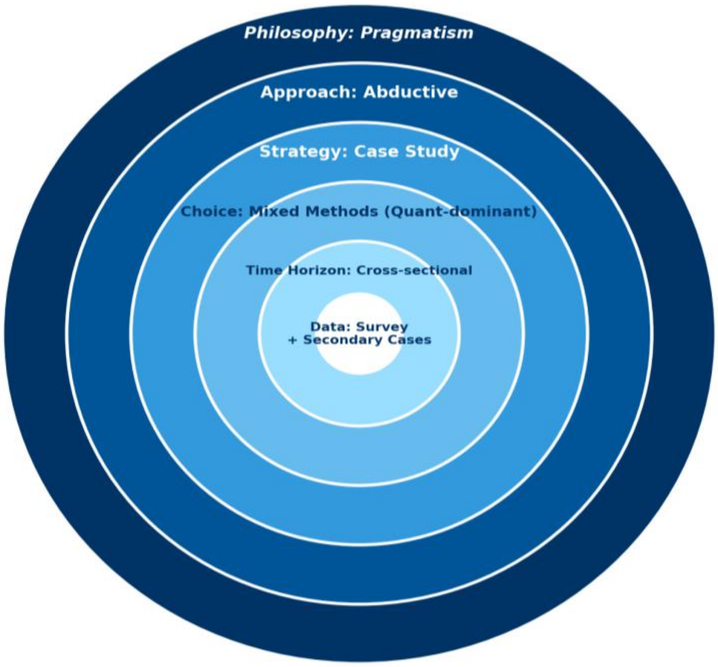

Figure 3: Research Onion adapted to This Study

The research approach is abductive, which means that theoretical expectations from the literature are tested and refined against empirical data. The strategy is a case study of Enterprise Mobility's proposed service, backed up by survey evidence. The data collection is mainly based on a quantitative online survey, supplemented by secondary qualitative evidence from international case studies and industry reports. The complete survey instrument is described in Appendix A.

3.2 Data Collection Methods

An online survey was sent over via Microsoft Forms to 55 respondents, primarily university students aged 18–24. The survey captured: demographics (age, employment, income, household size, area type); transport behaviour (frequency across four modes); car ownership status and reasons for non-ownership; adoption likelihood for the specified service; usage frequency and trip types; WTP for monthly, hourly, and daily pricing; feature importance ratings (five features, 5-point scale); and vehicle type preferences. Full frequency distributions are in Appendix B (Tables B1–B11). Descriptive statistics (mean, median, mode, standard deviation), regression analysis, and chi-square tests were applied to the data, with full results in Appendix D (Tables D1–D4).

Secondary data that were collected via Industry reports and competitor analysis, providing benchmarking context, including the Jaguar–Moda Living partnership (Jaguar, 2023), Hyundai's Mocean pilot in Utrecht (Hyundai, 2023), and the WATERKANT development in Berlin (Heldt et al., 2025).

3.3 Sampling and Ethics

The survey was distributed through my university networks, including course groups and student society channels, alongside personal contacts outside the university. This approach was chosen because the target population, young urban renters, had not been consulted previously through a defined sampling frame, making probability-based methods impractical for this project. A total of 55 complete responses were collected. Utilising these distribution channels, roughly 150 individuals, the effective response rate is estimated at around 37%. Furthermore, it is important to consider that convenience sampling can also cause bias, considering that the people who participated in the survey might have already been interested in shared mobility or new transportation methods, which could consequently have made the adoption rates appear higher than they actually are. The demographic composition of the sample, detailed in Section 4.1, closely mirrors the target user segment for this service. All participation was voluntary and anonymous, with informed consent obtained at the beginning of the survey. Data handling was GDPR-compliant, with responses stored securely and anonymised. Ethical approval was obtained through the University of Greenwich.

4. Findings

This chapter presents the key findings from the 55-respondent survey, structured around the research objectives.

4.1 Respondent Demographics

The sample closely aligns with the target demographic (Appendix B, Tables B1 to B4). The majority (76%) fall within the 18–24 bracket, with 51% identifying as students and 22% in full-time employment. Nearly half (49%) earn below £20,000. In terms of residential setting, 40% live in inner suburbs, 33% in city centres, 22% in small towns and 5% in outer suburbs.

4.2 Car Ownership and Transport Behaviour

56% of respondents do not own a car (Appendix B, Table B6), primarily due to reliable public transport (71%), high costs (45%), and lack of necessity (39%). Others cited not having a licence or difficulty locating parking (Appendix C, Table C2). This indicates that non-ownership reflects a rational response to cost and access, and possibly due to a lack of desire, meaning that a service that removes fixed ownership costs while maintaining access directly addresses these barriers.

Transport behaviour data (Figure 4) reinforces this: 60% use public transport daily, 40% never use a private car, and 80% have never tried car-sharing. This last figure is particularly significant, as it suggests the service would introduce most respondents to a new mode rather than competing for existing car-sharing users, consistent with Bardhi and Eckhardt's (2012) argument that access-based consumption works best when psychological barriers are low. For Enterprise, this means the addressable market is largely untouched by competitors like Zipcar, which rely on public kerbside bays rather than building-level integration.

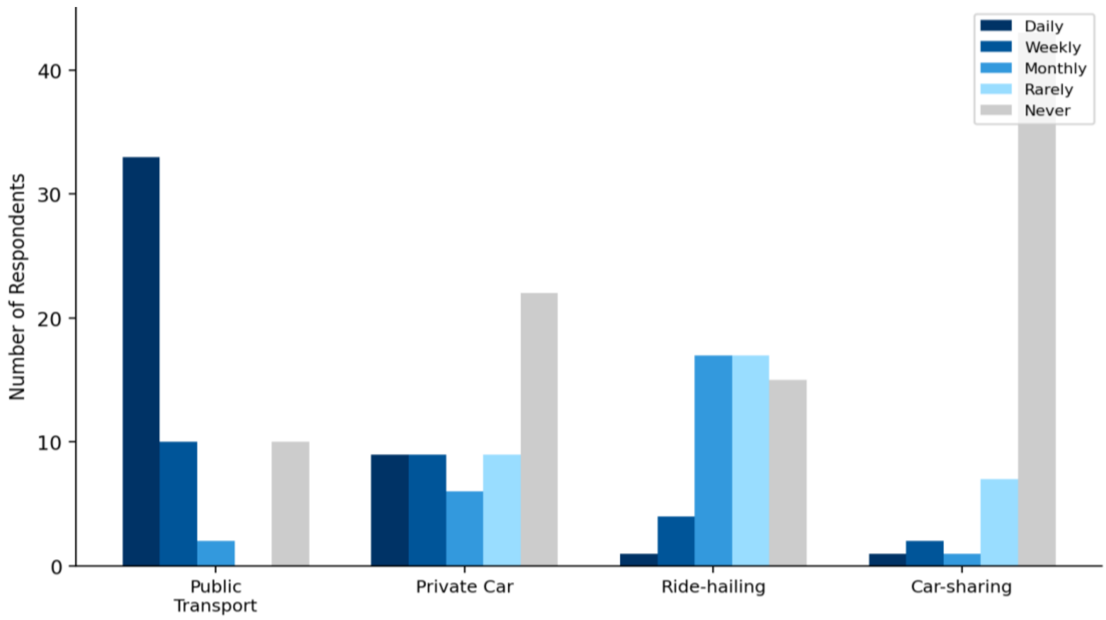

Figure 4: Transport Mode Frequency (n=55)

4.3 Service Adoption Likelihood and Usage Patterns

75% indicated they would be likely to use the service (51% "very likely," 24% "somewhat likely"). The mean adoption likelihood reaches 4.18/5.0 (SD = 0.99, median and mode = 5.0), revealing a strong positive skew (Figure 5). A chi-square test found no statistically significant link between car ownership and adoption ($\chi^2 = 0.79$, df = 1, $p > 0.05$), meaning adoption intent is high regardless of ownership status (Appendix D, Table D4, Figure D5).

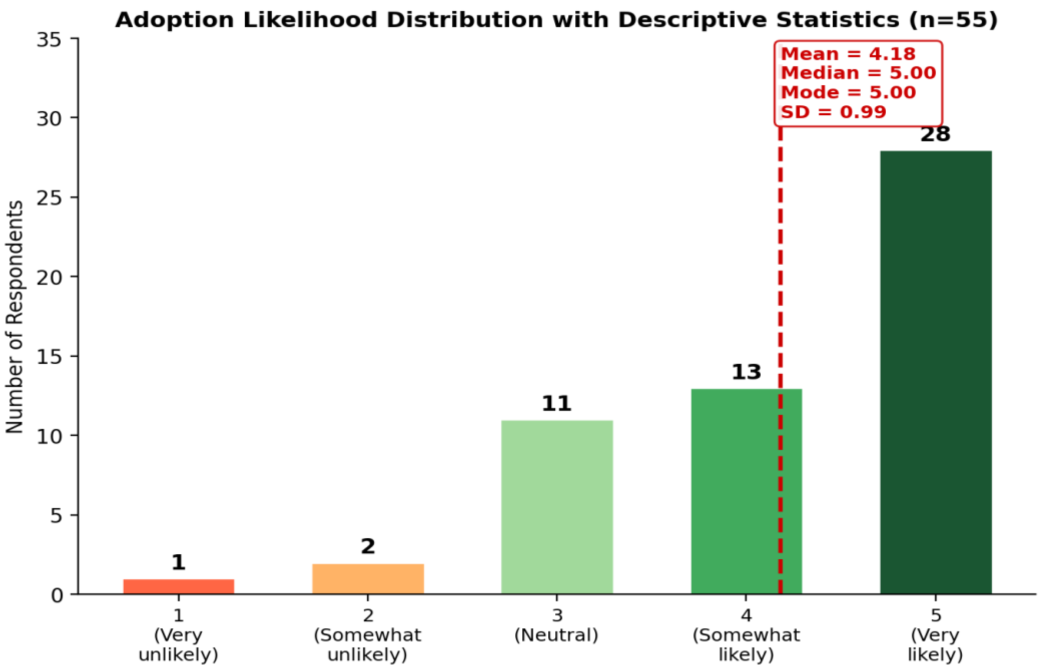

Figure 5: Adoption Likelihood Distribution with Descriptive Statistics

Figure 6 confirms that non-car-owners (77% positive) and car owners (76% positive) express comparable interest (Appendix C, Table C1). By area type, outer suburbs and small towns report the highest adoption (92–100%), reflecting weaker public transport (Table 1). Anticipated usage is encouraging: 33% expect weekly use, 25% daily, and 22% monthly, with social events, family visits, shopping, and commuting as the most popular trip types (Figure 7).

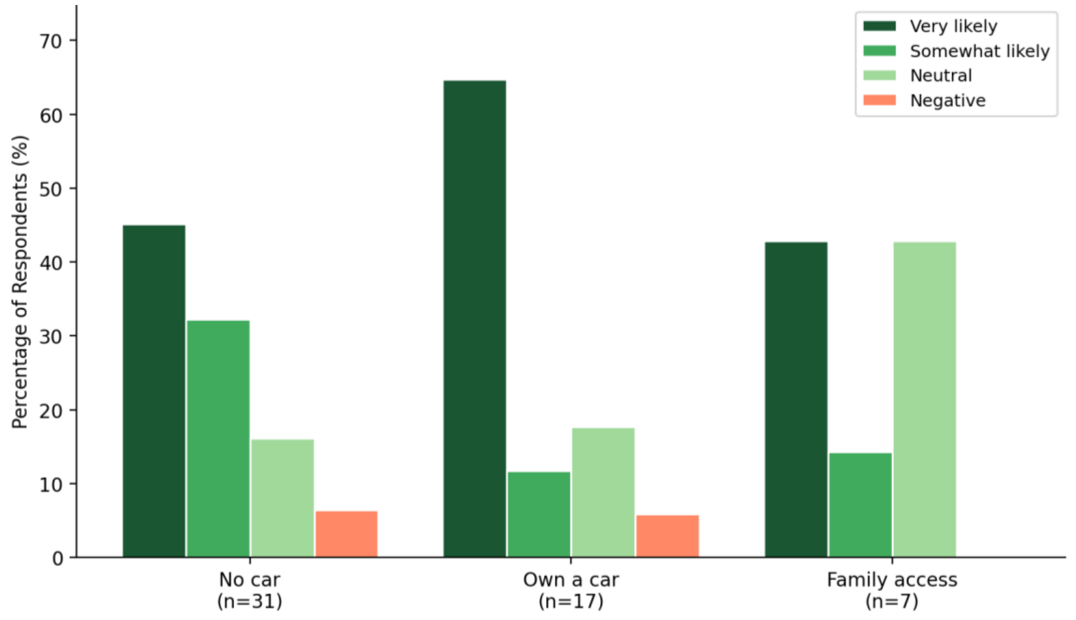

Figure 6: Service Adoption Likelihood by Car Ownership status

Area	n	% Positive	% Neutral	% Negative
City centre	18	61%	22%	17%
Inner suburb	22	73%	18%	9%
Small town/rural	12	92%	8%	0%
Outer suburb	3	100%	0%	0%

Table 1: Adoption by Area Type

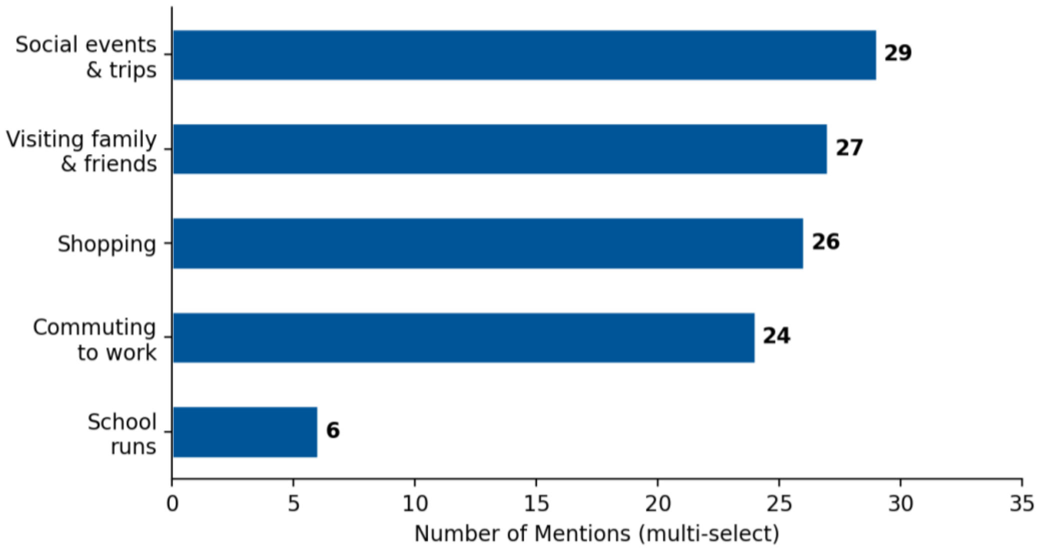

Figure 7: Preferred Trip Types for Service Use

4.4 Willingness-to-Pay

For the monthly fee, the mean WTP sits at £32.05 (SD = £13.04), with a median of £30.50 and a mode of £20.00 (Appendix D, Table D1). The high standard deviation supports a differential pricing approach. Cross-tabulation by income (Figure 8; Appendix C, Table C4) reveals that respondents earning £20,000–£34,999 are concentrated in the £46–£60 band (40%), while under-£20,000 earners cluster at £15–£25 (37%). Regression analysis found no statistically significant relationship between income and monthly WTP (Appendix D, Table 2, Figure 9). Surprisingly, in practical terms, income does not meaningfully predict how much a respondent is willing to pay. This carries an important strategic implication: Rather than being a premium product for higher earners, the service appears to appeal broadly across income levels, allowing Enterprise to position it as a mass-market offering. However, this should be treated with caution given the student-heavy sample (51%), which compresses the income distribution: 49% earn below £20,000, and only 12% above £35,000. A more income-diverse sample might reveal significant differences.

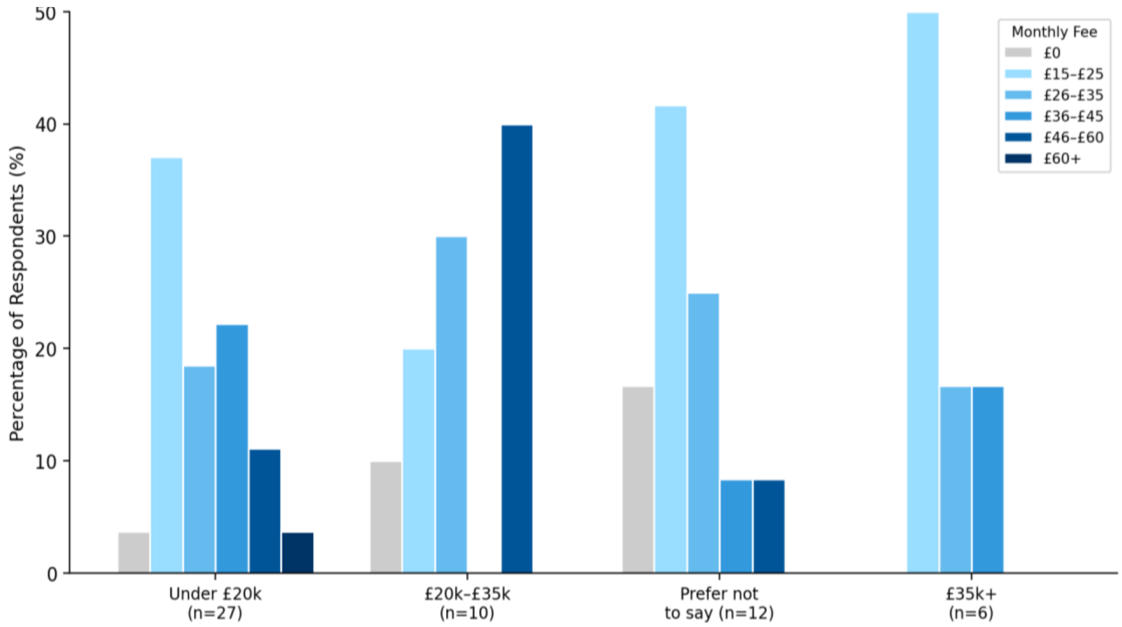

Figure 8: Monthly WTP Distribution by Income Bracket

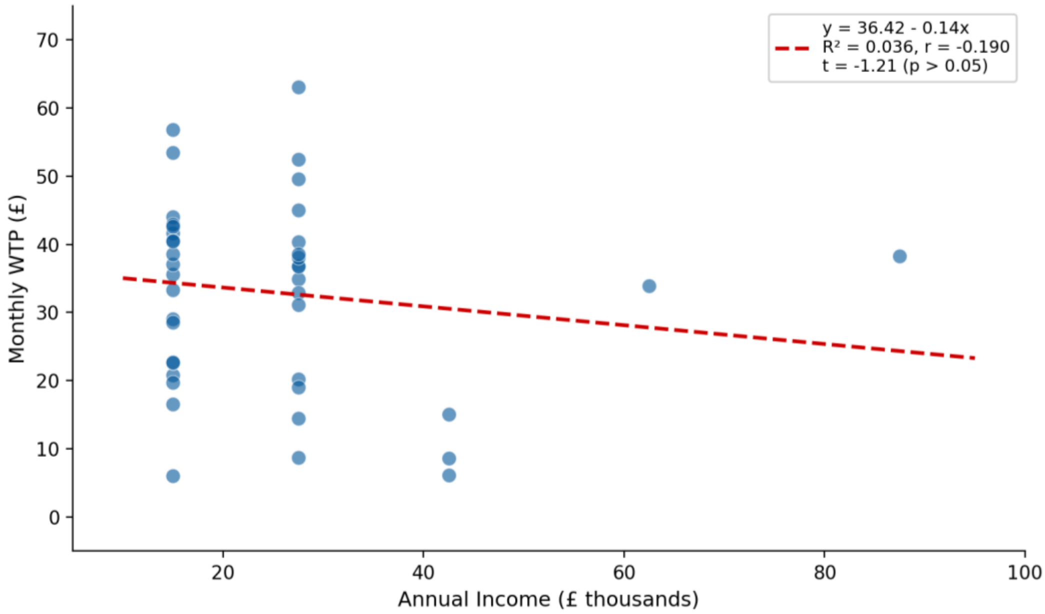

Figure 9: Regression: Income vs Monthly WTP

For the hourly rate, the mean is £7.55 (SD = £1.69, mode = £5.50), suggesting relatively consistent price expectations. For the daily cap, the mean is £42.64 (SD = £11.49, median and mode = £40.00), with 47% of responders selecting the £35–£45 band (Figure 10 and 11)

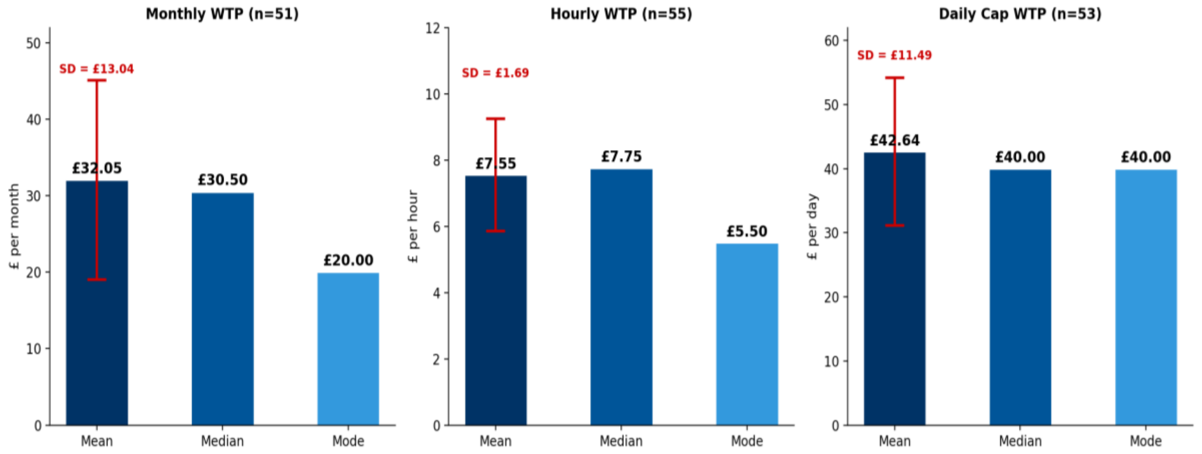

Figure 10: WTP Descriptive Statistics

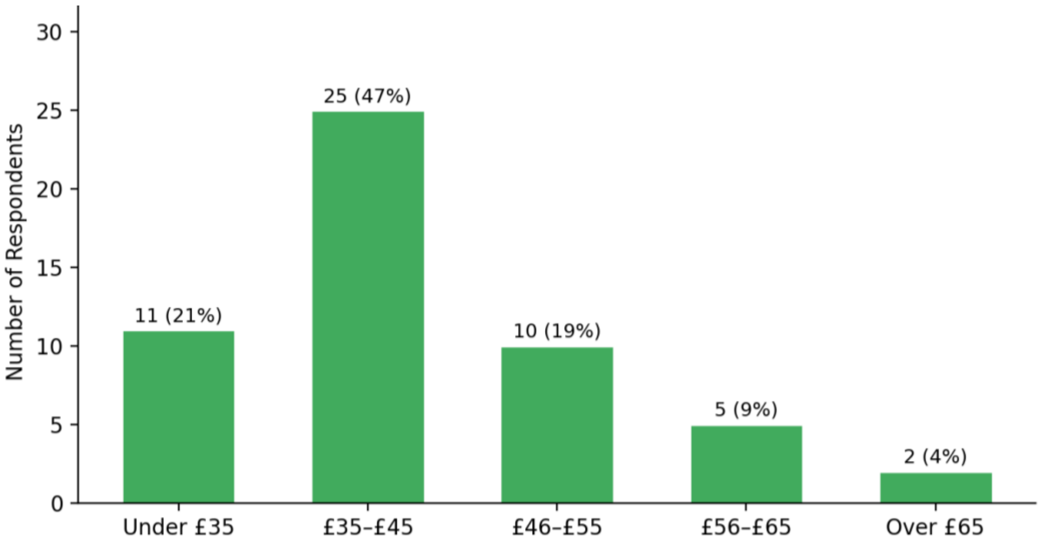

Figure 11: Willingness to pay- Daily Cup (n=53)

These WTP figures have direct implications for commercial viability. A £30 monthly subscription sits just below the mean, meaning most respondents would find it acceptable. However, whether £30 per subscriber combined with usage charges would cover operational costs of maintaining 3–4 vehicles per site, including insurance, charging, valeting, and maintenance, is uncertain, particularly during the early pilot phase. This suggests a single flat-rate subscription may not achieve break-even, and that a tiered model would be more appropriate: A basic tier at £25–£30/month for city car access alongside a premium tier at £40–£45/month with priority booking and SUV access, better capturing the WTP variation observed in the data.

4.5 Feature Importance and Vehicle Preferences

On a 1–5 scale (Figure 12), dedicated on-site parking achieves the highest mean, followed by comprehensive insurance, professional valeting, EV provision, and guaranteed availability. Insurance is rated "essential" by the largest share of respondents, confirming it must be included in the service. For vehicle preferences, small city cars are most frequently mentioned (52%), followed by SUVs/crossovers and compact hatchbacks (Figure 13).

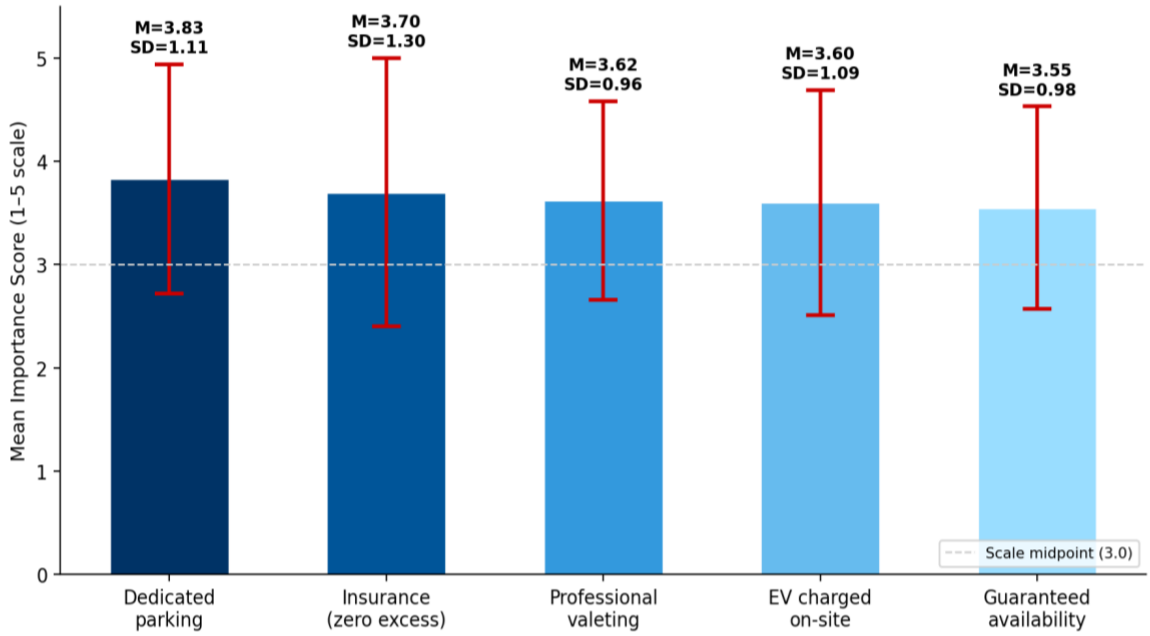

Figure 12: Feature Importance Mean Scores

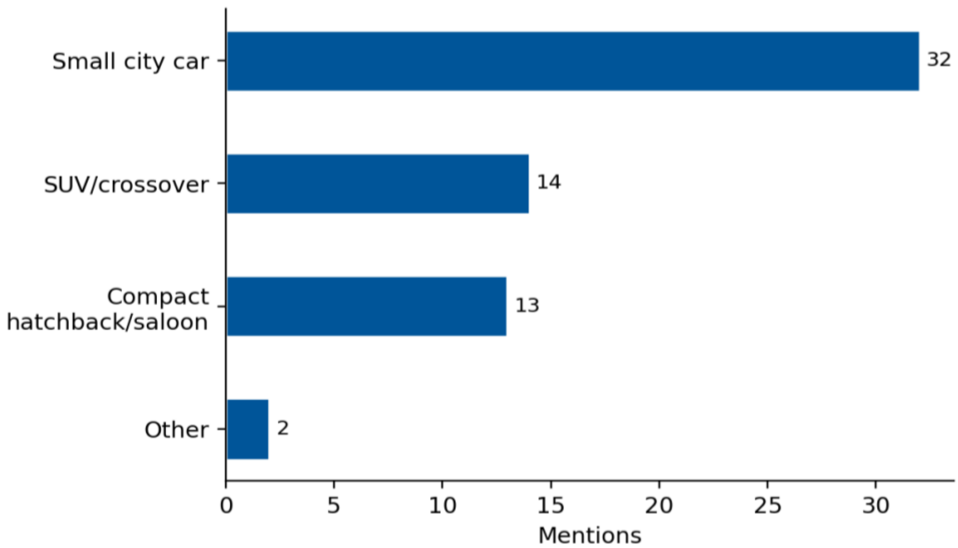

Figure 13: Preferred Vehicle Type

5. Discussion and Analysis

5.1 Critical Analysis of Findings

The survey further shows an interesting outcome for Enterprise Mobility. A 75% positive adoption rate (mean = 4.18/5.0) and a WTP monthly fee of £32.05, which shows that the business idea is covering a new customer need. Regression analysis examining the link between adoption likelihood and monthly WTP found a positive but non-significant coefficient ($b = 1.47$, $R^2 = 0.01$, $p > 0.05$), suggesting that WTP is relatively uniform regardless of stated adoption intent (Table 2). Furthermore, the income-to-WTP regression produced a weak negative association ($r = -0.19$, $p > 0.05$). In statistical terms, non-significance means that the observed relationships could plausibly have arisen by chance; the data do not provide sufficient evidence to conclude that income or adoption intent predict WTP in the broader population (Tyllianakis and Skuras, 2016). However, this does not mean these relationships are absent entirely. Instead, the lack of significance is itself a commercially useful finding: It indicates that willingness to pay is broadly stable across the sample regardless of income or stated enthusiasm for the service. For Enterprise, this implies that the service has the potential for mass-market positioning rather than niche targeting, as pricing does not need to be calibrated to specific income levels. That said, this conclusion should be qualified by the sample composition. With 51% of respondents being students and 49% earning below £20,000, the income range captured is narrow. A more diverse group of working professionals in Build-to-Rent developments might show differences in willingness to pay based on income that this data cannot identify. Future pilot data from real subscribers would better test this relationship.

Model	Slope (b)	Intercept	R^2	r	t-stat
Income / Monthly WTP (n=41)	-0.00014	£36.42	0.036	-0.190	-1.210
Car Ownership / Adoption (n=55)	0.047	4.161	0.001	0.024	0.167
Adoption / Monthly WTP (n=51)	1.47	£25.72	0.010	0.098	0.692
Insurance Imp / WTP (n=49)	0.88	£29.02	0.007	0.083	0.574

Table 2: Regression Analysis Results

The fact that 56% of respondents do not own a car, with expenses cited at 45% and public transport availability at 71%, reflects the core value proposition (Appendix C, Table C2). These respondents are not opposed to cars; they are responding rationally between the cost and access. A service that takes out the fixed costs of ownership (purchase price, insurance, maintenance, parking) while offering on-demand access fundamentally allows people to use this service. Additionally, even existing car owners show 76% positive intent (Figure 6), suggesting the service could also function as a complement, enabling owners to downgrade from two cars to one or to access a different vehicle type for specific trips. Having said that, it is clear that the addressable market is well beyond the non-car-owning segment, which is strategically important because it means Enterprise does not have to bet solely on non-owners, but it can also capture supplementary demand from households that already own but would benefit from flexible access to a second vehicle without the associated costs.

5.2 The Dual Value Proposition: Tenant Savings and Landlord Premium

The data points to something commercially interesting: The service creates real value for two very different stakeholders at the same time, and through entirely different mechanisms.

For tenants, the numbers are fairly stark. Car ownership in the UK runs to about £6,980 annually when you add up insurance, fuel, maintenance, road tax, and depreciation together (Free Plate Check, 2025). A tenant on this service paying the survey mean, so £32 a month plus three trips at £8.50 an hour for roughly three hours each, would spend somewhere in the £1,300 to £2,400 range per year. Compared to owning a car, that is between £3,000 and £6,500 back in their pocket, and that is before touching the question of purchase cost. On an early-career salary in London, that gap is not trivial.

For landlords and developers, the logic works differently but is no less compelling. Wrapping car-sharing into the building offer, the same way a gym or concierge gets bundled in, turns the property into something more than a place to sleep. Survey respondents indicated they would accept £20 to £35 a month as part of their rent for this kind of amenity. Even at the lower end, £25 to £30 extra per unit per month adds up to £300 to £360 annually per tenant. Run that across 200 units and the landlord is looking at £60,000 to £72,000 in additional rental income each year, comfortably more than the cost of keeping three or four shared cars on site.

Worth flagging too: Sprei et al. (2020) and Rivasplata et al. (2012) both found that shared vehicle provision gives developers grounds to reduce parking supply, which frees up space for more units or commercial lettings. Put it all together and the model works for everyone involved. Tenants spend less than they would on owning a car. Landlords charge a bit more and spend less on parking. Enterprise gets a revenue stream anchored to long leases rather than individual bookings. That kind of three-way fit is genuinely hard to engineer, and it is what sets this apart from standard car rental.

5.3 Linking Findings to the Literature

The 75% adoption rate is similar to the finding by Stiebe et al. (2025) that buildings with integrated mobility help residents feel less need to own a car. Also, 80% of respondents had never used car-sharing before, which supports Shaheen and Cohen's (2013) idea that residential settings reach people that public car-sharing platforms cannot. Le Vine and Polak (2017) found that 37% of London car-sharing users changed their ownership decisions because of it. The current data shows an even stronger intention, likely due to improved service features like zero-excess insurance and guaranteed on-site parking.

On pricing, the WTP mean of £32.05 a month lines up with Rently's (2025) finding that tenants will pay $20 or more monthly for smart building amenities. Zalejska-Jonsson et al.(2020) offer a useful explanatory frame here: tenants assign premiums to features they see as both personally useful and environmentally responsible. That explains why insurance coverage and parking availability ranked above the EV feature in the survey. Residents are not primarily motivated by sustainability credentials; they want convenience and risk taken off their plate.

Figure 7 shows that most respondents expected to use the service for social trips, family visits, and shopping runs. These are exactly the journeys public transport does badly, particularly in the evenings or at weekends. Kopp et al. (2015) noted that car-sharing users typically settle into a pattern where they commute by public transport and reach for a shared car when the journey does not suit a bus or train. That is the gap this service occupies. It is not trying to undercut the tube or replace Uber; it is covering the trips that neither handles well.

6. Recommendations

Building on the survey findings and the literature reviewed throughout this report, the following recommendations are organised across three time horizons.

Short-Term (0–12 Months): Pilot Launch

1. Phased Pilot Deployment. Enterprise should pilot at three to five Build-to-Rent developments in inner London, selected using four criteria: At least 100 units, limited existing parking, a young resident profile (average age 25–30), and reasonable public transport access. Boroughs such as Tower Hamlets, Hackney, Greenwich, and Newham, where Build-to-Rent concentration is highest and car-free households exceed 40% (Iceni Projects, 2024), should be prioritised. Each site needs three to five dedicated EV charging bays, negotiated at below-market rates in exchange for amenity value.

2. Pricing Model. Enterprise should introduce a two-tier structure: a basic tier at £25–£30/month with city car access at £8.50/hour (daily cap £40), and a premium tier at £40–£45/month offering SUVs and priority booking, targeting the £20k–£35k income group which concentrated at the £46–£60 WTP band (Appendix C, Table C4). An introductory rate of £20/month for three months would build early uptake. The fee should be framed as a building amenity bundled into rent, giving landlords reason to increase asking rents.

3. Fleet Composition. Three to four fully electric city cars per site, such as the Fiat 500e, with zero-excess insurance and professional valeting between bookings, both top-ranked in the survey (Appendix D, Table D2).

Medium-Term (12–24 Months): Optimisation and Expansion

4. Data-Driven Refinement. After six months, each pilot should be evaluated on four KPIs: vehicle utilisation (target ≥40%), subscriber conversion (15–20% of residents), revenue per vehicle, and Net Promoter Score. Sites below 30% utilisation should trigger pricing adjustments; above 50% should trigger additional deployment.

5. Partnership Scaling. Expansion to ten to fifteen sites across London, as well as in Manchester, Birmingham, and Bristol (Iceni Projects, 2024), should involve revenue-sharing partnerships where developers earn 10–15% of subscription revenue. To overcome landlord resistance, Enterprise should show that the added amenities outweigh the lost parking income or suggest reduced parking options, following methods from Rivasplata et al. (2012) and Sprei et al. (2020).

Long-Term (24–60 Months): National Rollout

6. National Expansion. The target is fifty or more sites nationally, with student accommodation as the primary growth vertical. Enterprise should engage UK planning authorities on parking reduction incentives modelled on Vienna's approach (The Guardian, 2025).

7. Measurement Framework. Every site should be tracked at six- and twelve-month intervals on utilisation, subscriber conversion, revenue per vehicle, and car ownership shifts, feeding into a go/no-go expansion decision at the twelve-month mark.

7. Conclusion

This report has evaluated the feasibility of Enterprise Mobility's Residential Mobility 2.0 concept, addressing how embedded car-sharing shapes car ownership and modal shift, and what WTP and operational factors demonstrate its scalability. The 55-responder survey delivers clear evidence of demand: 75% positive adoption intent (mean = 4.18/5.0), 93% willingness to pay a monthly subscription (mean = £32.05, SD = £13.04), and a well-defined pricing model. Regression and chi-square analyses confirm that demand is uniformly strong across demographic segments, reinforcing the case for a national market rather than a niche one.

As demonstrated, the service offers a dual value proposition that benefits both parties in the rental relationship. Tenants save £3,000–£6,500/year compared to private car ownership while avoiding the upfront purchase cost entirely. Landlords, in turn, gain a premium amenity that justifies higher rents and differentiates their properties in the competitive Build-to-Rent market, while also reducing the need for costly parking infrastructure.

The study acknowledges limitations: the survey taken may overstate adoption intent due to hypothetical bias; the cross-sectional design captures stated preferences rather than observed behaviour; and the absence of primary stakeholder interviews means that partnership dimensions rely on secondary evidence. Future research should incorporate longitudinal pilot tracking and qualitative interviews with Build-to-Rent operators and understand what legal action should be considered.

Despite these constraints, the combination of Willingness to Pay data, statistical analysis, feature importance rankings, vehicle preferences, and demographic targeting criteria provides Enterprise Mobility with a solid, evidence-based foundation for launching a phased pilot or simply discovering this new type of market. If executed at the recommended 3–5 Build-to-Rent sites, Residential Mobility 2.0 has the potential to position Enterprise as the first mover in the UK's emerging residential shared mobility market and, nationally, beyond.

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9. Appendices

Appendix A: Survey Instrument

The survey captured 33 data fields: consent/eligibility; demographics (age, employment, income, household size, area type); car ownership and transport behaviour (4 modes rated by frequency, reasons for non-ownership); service adoption (likelihood, frequency, duration, trip types); WTP (monthly, hourly, daily); feature importance (5 features, 5-point scale); impact on car ownership plans; vehicle type preferences. Full instrument available on request.

Appendix B: Full Frequency Distribution Tables

Table B1: Age Distribution

Age Group	n	%
18–24	42	76%
25–34	4	7%
35–44	1	2%
45–54	2	4%
55+	6	11%

Table B2: Employment Status

Status	n	%
Student	28	51%
Full-time	12	22%
Part-time	9	16%
Self-employed	3	5%
Other	3	5%

Table B3: Annual Income

Income Band	n	%
Under £20,000	27	49%
£20k–£35k	10	18%
£35k–£50k	2	4%
£50k–£75k	2	4%
£75k+	2	4%
Prefer not to say	12	22%

Table B4: Household Size

Size	n	%
1	7	13%
2	9	16%
3–4	29	53%
5+	10	18%

Table B5: Area Type

Area	n	%
City centre	18	33%
Inner suburb	22	40%
Outer suburb	3	5%
Small town/rural	12	22%

Table B6: Car Ownership

Status	n	%
No car	31	56%
Own a car	17	31%
Family access	7	13%

Table B7: Service Adoption Likelihood

Likelihood	n	%
Very likely	28	51%
Somewhat likely	13	24%
Neutral	11	20%
Somewhat unlikely	2	4%
Very unlikely	1	2%

Table B8: Monthly WTP

Fee	n	%
£0	4	7%
£15–£25	21	39%
£26–£35	12	22%
£36–£45	8	15%
£46–£60	8	15%
£60+	1	2%

Table B9: Hourly Rate WTP and Daily Cap WTP

Rate	n (Hourly)	n (Daily Cap)
Under £7	Under £35	19 (35%)	11 (21%)
£7–£8.50	£35–£45	19 (35%)	25 (47%)
£8.50–£10	£46–£55	14 (25%)	10 (19%)
£10–£12	£56–£65	3 (5%)	5 (9%)
-	Over £65	-	2 (4%)

Table B10: Booking Duration

Duration	n	%
1–2 hours	15	27%
3–4 hours	18	33%
Full day	15	27%
Overnight/weekend	7	13%

Table B11: Feature Importance Matrix (n=53)

Feature	Essential	Signif.	Moderate	Slightly	Not at all
Insurance	20 (38%)	12 (23%)	10 (19%)	7 (13%)	4 (8%)
Parking	18 (34%)	17 (32%)	11 (21%)	5 (9%)	2 (4%)
Availability	10 (19%)	16 (30%)	22 (42%)	3 (6%)	2 (4%)
EV on-site	14 (26%)	14 (26%)	16 (30%)	8 (15%)	1 (2%)
Valeting	11 (21%)	18 (34%)	17 (32%)	7 (13%)	0 (0%)

Appendix C: Cross-Tabulation Tables

Table C1: Adoption by Car Ownership

Likelihood	No car (31)	Own car (17)	Family (7)	% Positive
Very likely	14 (45%)	11 (65%)	3 (43%)	51%
Somewhat likely	10 (32%)	2 (12%)	1 (14%)	24%
Neutral	5 (16%)	3 (18%)	3 (43%)	20%
Negative	2 (6%)	1 (6%)	0 (0%)	5%
Total positive	77%	76%	57%	75%

Table C2: Reasons for Not Owning a Car (n=31)

Reason	Mentions	% of non-owners		
Good public transport	22	71%		
Too expensive	14	45%		
Don’t need one	12	39%		
No licence	8	26%		
No parking	4	13%		
Environmental	2	6%		
Other	1	3%		

Table C4: Monthly WTP by Income

Fee	Under £20k	£20k–£35k	£35k+	PNtS	All
£0	1 (4%)	1 (10%)	0	2 (17%)	4 (7%)
£15–£25	11 (41%)	2 (20%)	4 (67%)	4 (33%)	21 (39%)
£26–£35	5 (19%)	3 (30%)	1 (17%)	3 (25%)	12 (22%)
£36–£45	6 (22%)	0	1 (17%)	1 (8%)	8 (15%)
£46–£60+	4 (15%)	4 (40%)	0	2 (17%)	9 (16%)

Appendix D: Statistical Analysis

Table D1: Descriptive Statistics for WTP Variables

Variable	Mean	Median	Mode	Std Dev	n
Monthly WTP (£)	£32.05	£30.50	£20.00	£13.04	51
Hourly WTP (£)	£7.55	£7.75	£5.50	£1.69	55
Daily Cap WTP (£)	£42.64	£40.00	£40.00	£11.49	53
Adoption (1–5)	4.18	5.00	5.00	0.99	55

Note: WTP coded using band midpoints. Adoption on 5-point scale (1=Very unlikely, 5=Very likely).

Table D2: Feature Importance Descriptive Statistics (1–5)

Feature	Mean	Median	Mode	Std Dev	n
Dedicated parking	3.83	4.00	5.00	1.11	53
Insurance (zero excess)	3.70	4.00	5.00	1.30	53
Professional valeting	3.62	4.00	4.00	0.96	53
EV charged on-site	3.60	4.00	3.00	1.09	53
Guaranteed availability	3.55	3.00	3.00	0.98	53

Table D3: Statistical Techniques Applied

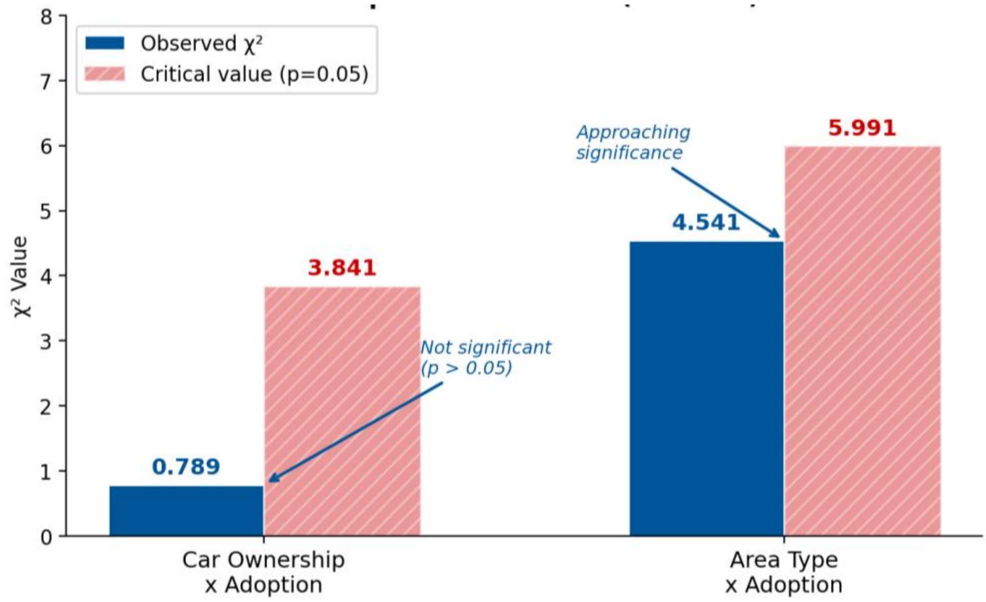
Test	Purpose	Application	Interpretation
Mean	Average value of dataset	Average WTP and adoption likelihood	Mean monthly WTP of £32.05 indicates central pricing anchor
Median	Middle value, robust to outliers	Central tendency when distributions are skewed	Median £30.50 confirms mean is not distorted by extremes
Mode	Most frequent value	Most popular price band	Mode of £20.00 identifies the single most selected band
Standard Deviation	Dispersion around mean	Consistency of WTP; informs single vs tiered pricing	SD of £13.04 indicates substantial variation, supporting tiered pricing
Linear Regression	Relationship between dependent and independent variable	Tests whether income predicts WTP; whether adoption predicts WTP	b = -0.14 per £1,000 income: WTP does not increase linearly with income ($R^2 = 0.04$, $p > 0.05$)
Chi-Square	Relationships between categorical variables	Whether car ownership is associated with adoption	$\chi^2 = 0.79$ (df=1, $p>0.05$): no significant association; adoption is uniform
Correlation	Strength and direction of linear relationship	Correlations between adoption, WTP, income, features	r = -0.19 (income vs WTP); r = 0.10 (adoption vs WTP); both weak, non-significant

Table D4: Chi-Square Test Results

Test	χ^2	df	Critical (p=0.05)	Significant?
Car Ownership x Adoption	0.789	1	3.841	No ($p > 0.05$)
Area Type x Adoption	4.541	2	5.991	No ($p > 0.05$)

The area type test approached significance ($\chi^2 = 4.54$, critical = 5.99), suggesting a trend toward higher adoption in suburban areas. A larger sample would likely confirm this, with direct implications for site selection.

Figure D5: Chi-Square Test Results



10. Declaration of AI Use

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1.
2.
3.
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6.

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