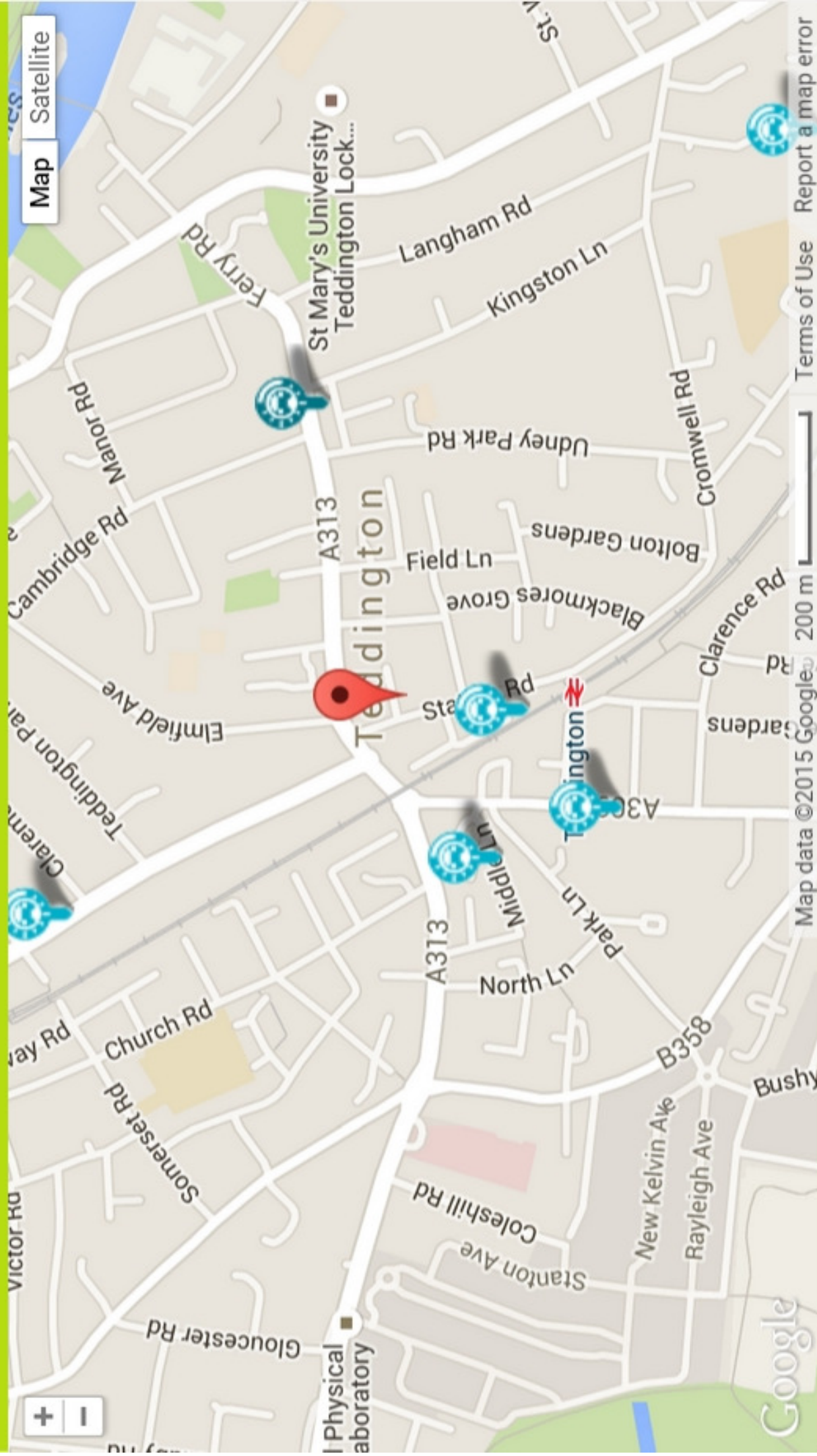


Appendix E

Car Club Map

Find your nearest car

Share this:



tw11 8ew

Go

Enter postcode - or right-click on map - or select a region below

8 car locations found within 1 mile of tw11 8ew. See locations of nearest cars below.

Appendix F

Carplus Report Executive Summary



Carplus annual survey of car clubs

2015/16
London

carplus
bikeplus
supporting shared transport





Carplus Annual Survey
of Car Clubs 2015/16

Report
April 2016

Carplus

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Executive Summary

The Carplus Annual Survey 2015/16 was completed by over 4,100 round-trip car club members and over 1,100 flexible car club members in London⁶. This is a response rate of 5,200 from 186,000 members.

This is the first annual survey that has included members of flexible car clubs, introduced in some London boroughs in the last two years. The results of surveys of flexible car club members in this report suggest that these new models are likely to have the effect of reducing private car ownership and use in the capital, as is the case in the established round-trip model.

Car club growth continues across London

There are now 186,000 car club members in London, up from 155,000 last year and almost 2,500 cars, up from 2,400 in the last year. There are now 70 round-trip members per car in London, up from 66 last year. Continuing this rate of growth will achieve London Car Club Strategy targets for number of cars by 2020, but fall slightly short on number of members.

Fewer privately owned cars amongst car club members

For each round-trip car club vehicle, car club members sell or dispose of more than 10 private cars - that's 25,500 private cars sold or disposed of by members.

A third of round-trip car club members reported that they would have bought a private car if they had not joined a car club meaning a deferred purchase of a further 54,400 cars, or 22 cars for each car club vehicle. Add in the impact of deferred purchase by flexible car club members and the number of deferred vehicle purchases is almost 58,000.

Lower levels of car ownership

Joining a car club car leads to lower levels of car ownership. 25% of new round-trip car club members and 22% of new flexible car club members had sold or disposed of a car in the last 12 months. 42% of new round-trip members owned at least one car before joining, falling to 24% after joining. For new flexible members, 46% owned at least one car before joining, which fell to 36% after joining.

Fewer miles travelled by car

Round-trip members reported an average reduction in miles driven of 730 miles a year. Flexible members reported a reduction of 840 miles a year.

Members make fewer trips by car as driver

After joining a car club, new members reduce their car use. Before joining a car club, 22% new round-trip members travel by car as a driver at least once a week, falling to 17% after joining. Amongst new flexible members, 32% travel by car as a driver at least once a week, falling to 29% after joining.

More cycling, Underground and train use than the average Londoner

Car club members cycle and use trains and the Underground more than the average Londoner. Amongst round-trip members, travel by train and cycling is almost double the London average,

⁶ Less than 10% of round-trip members surveyed are also members of flexible car clubs, while 40% of flexible members are also members of round-trip car clubs.

with Underground use 27% higher than average. Amongst flexible members, travel by train is almost double the London average and use of the Underground is 17% higher.

Car club members join to gain additional personal freedom

The most common circumstance in which both round-trip (37%) and flexible (41%) members joined a car club is *“my household did not have a car, so I joined a car club to gain additional personal freedom”*.

There were a range of other statements to choose from: 23% of round-trip respondents chose a statement indicating that they had joined a car club having disposed of a car and 6% had joined instead of buying a car. Results for flexible members were similar.

Car club members do not drive often

14% of round-trip members and 20% of flexible members haven't used a car club vehicle in the last six months or have not yet made a car club journey. Most common reasons for round-trip members for not using it more frequently were because they are members of car clubs as a back-up to their usual sustainable travel modes and because that they had not made any journeys that required a car. The cost of hiring vehicles and vehicles not being close enough to where they are needed were the main reasons for flexible members.

Car club vehicles used for journeys that would be unsuitable by other modes

Amongst round-trip and flexible members, common reasons for using a car club car were to make multi-purpose trips (going to more than one place), to reduce the journey time, when using public transport would take too long, and when carrying luggage or bulky items.

Both round-trip and flexible members reported their journey would have taken longer if they had used alternative modes, including public transport, walking or cycling.

Electric vehicles becoming increasingly popular

Over half of flexible members have used an electric vehicle and 9% of round-trip members have used one, up from 4% in 2014/15. Given the greater availability of hybrids compared to EVs in round-trip car clubs in London, it is likely that some respondents who stated they used EVs had actually used hybrids. Round-trip and flexible car club members both rate the experience of using electric vehicles highly, but give lower ratings to their experience of using electric vehicle charging points.

Respondents who have not yet used an electric car club car would be happy to do so: 94% of flexible members and 89% of round-trip members expressed an interest trying an electric vehicle. Those who have concerns about using electric vehicles cited concerns about charging the vehicle, rather than the vehicles' range or performance.

Car club members are frequent users of smartphones and travel apps

Nearly all round-trip and flexible car club members own a smartphone, more than the national average of 71%⁷, and over half use their phone to access travel information on a daily basis. Popular travel websites and apps are Google maps, Transport for London, National Rail and Citymapper. Car club users are increasingly able to choose from a wide selection of transport

⁷ https://www.ipsos-mori.com/Assets/Docs/Publications/Ipsos_Connect_Tech_Tracker_Q3_2015.pdf

options, using instantly available information from their smartphones to make decisions whilst on the move.

A cleaner, safer fleet

Car club cars are safer than the average car: 88% of the London fleet meet the NCAP 5+ Star or 5 Star standard.

Car clubs emit one tonne of carbon a year less than an average car for the same mileage and carbon emissions of London club cars are on average 20% lower than the typical UK private car.

Eight out of ten London car club vehicles are in the lowest three emission bands: A, B and C. Car club cars are cleaner than the average private car: in the UK national fleet, the largest proportion of vehicles (16%) is in Band G.

The number of ULEV car club cars in the London car club fleet rose from 24 in 2014 to 251 in 2015. The growth since 2013 when there were only eight ULEV car club cars is significant. In contrast, diesel cars are disappearing from car club fleets, accounting for 30% of the 2015 fleet, compared to 47% in 2014.

Car club cars are used around five times more efficiently than private cars

On average, car club cars are booked for just under 6 hours a day, around 25% of the day. This is notably higher than the utilisation of private cars, which it is estimated are used for less than 5% of the day on average in the UK⁸. The utilisation of private cars in London is likely to be lower still, as there is higher use of public transport for journeys such as commuting in the capital, compared to elsewhere in the country.

Car club members include a diverse range of people

Car club members reflect where car club provision is greatest with many drawn from households in accessible inner suburbs. Based on Mosaic profiling⁹, many car club members are ambitious young people in their 20s and 30s, known as Metropolitan High Flyers in the Mosaic classification. One in four round-trip and flexible members is in this Mosaic group compared to only one in ten of the London population.

Compared with the survey last year members are also attracted from more diverse backgrounds with 10% of round-trip members from the Crowded Kaleidoscope Mosaic group, which includes families in social housing and 11% of flexible members from the Flexible Workplace group, which is characterised by young people starting work in mainly public sector positions.

Higher occupancy of cars

Car club cars are used by more people with an average occupancy of 2.5 people per round-trip car club car and 2.4 people per flexible car club car compared to 1.6 people for private cars (LTDS, 2014/15).

⁸ Spaced Out: Perspectives on parking policy, Bates & Liebling, RAC Foundation 2012

⁹ Mosaic is a geodemographic profiling tool which classified residential postcodes into one of 66 types, based on demographics, attitudes and a wide range of other data from commercial and public statistics.

Car clubs are used for a wide range of purposes including personal business, visiting friends/family, shopping and leisure. Half of round-trip members and around one in five flexible members were transporting bulky objects on their most recent trip.