

# London Councils' Transport & Environment Committee

## Car Club Strategy

Item no: 12

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### Summary

The Car Club Strategy (Appendix 1) has been jointly developed by members of the Car Club Coalition which includes representatives from the industry, London Councils, GLA and TfL.

The Strategy sets out a collaborative approach between these commercial and public sector players to accelerate the growth of the sector in London and maximise their potential benefits for London, which are achieved by providing an alternative to private car ownership. These benefits include reduced pressure for car parking, access to cleaner vehicles, improved air quality (particularly if electric vehicles are used in the fleet) and promoting a greater use of sustainable transport options.

To date, car clubs have been most successful in the areas of high urban density and strong public transport access most associated with inner London. Considerable potential is also identified in Outer London where private vehicle ownership is higher. The actions in the Strategy are designed to unlock new markets by appealing to a wider group of potential members. In line with the Mayor's Transport Strategy, the different models for car clubs must complement rather than replace sustainable and active modes of travel such as walking, cycling, bus and tube travel.

Members' comments are invited during this meeting. The document was circulated to boroughs on 12 March for their information and feedback. Any comments, questions or feedback following the meeting should be submitted to [rhonamunck@tfl.gov.uk](mailto:rhonamunck@tfl.gov.uk).

**Recommendations**    The Committee is asked to ENDORSE the Car Club Strategy

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## 1. Background

The Car Club Coalition was established in September 2014 as an outcome of the Car-Lite event on 10 July. It includes representatives of the car club operators, London Councils, GLA, TfL and industry. Since its inception, the Coalition has met regularly to develop a Car Club Strategy for London. The Strategy will be owned by the industry but endorsed by all parties in the Coalition. Fortnightly meetings, facilitated by TfL and London Councils, have been held to discuss the evidence base, to identify the challenges for the industry and to agree on necessary actions to overcome these challenges.

Car clubs and flexible car sharing offer a cost-effective alternative to car ownership for both private and commercial customers, providing access to shared vehicles to members on a pay-as-you-drive basis. In complementing public transport, walking and cycling, car clubs allow people to build “mobility lifestyles” that mean they do not need to own private cars to the same extent that they do today. The promotion of car clubs was identified in the Roads Task Force report in 2013 as one of a number of demand management measures which can reduce overall car dependence by making access to cars more flexible, therefore reducing pressure on road space, including parking space. Car clubs can also bring wider benefits such as improved air quality through use of cleaner vehicles (particularly if electric vehicles are used in the fleet) and a greater use of sustainable transport options.

London has one of the largest car club markets in Europe but car clubs are not yet a mainstream sustainable form of transport. The sector is currently innovating rapidly with new operators entering the field and there is considerable potential for growth, particularly with respect to one-way and flexible car sharing which has seen rapid growth in cities like Paris and Berlin. The various models will appeal to different groups for different types of journeys. The actions in this Strategy are designed to unlock new markets through appealing to a wider group of potential members. In line with the Mayor’s Transport Strategy for London the different models for car clubs must complement rather than replace sustainable and active modes of travel such as walking, cycling, bus and tube travel.

A Draft Car Club Strategy was submitted to the Transport and Environment Committee on 11 December and boroughs were invited to comment after the meeting. Priority issues for the boroughs were: the need for further evidence on the impacts of new models and the growth of car clubs; differentiation between inner and outer London boroughs; appealing to a wider audience for reasons of social inclusivity; and respecting the autonomy of the boroughs and their local priorities. A workshop, chaired by London Councils, was also held to develop the specific action on parking management and was attended by borough officers, TfL and car club operators. Comments and insights from the boroughs have been incorporated into the final version of the Strategy (Appendix 1). The final version of the document has been approved by the Deputy Mayor for Transport, Isabel Dedring.

Facilitated by TfL, the Coalition has also compiled a supplementary Evidence Summary (Appendix 2) to bring together the key pieces of published research from the UK and abroad. The results of this exercise to date form the evidence base for this strategy, but this work has highlighted conflicting opinions on the strength of the evidence, remaining evidence gaps and need for further research, particularly with regards to how newer models of car clubs will operate in practice within the London context and what their impact will be. The Strategy acknowledges these issues and seeks to address them through the Action Plan, particularly in *Action 1: Developing a monitoring framework to build the evidence on the impacts of car clubs*.

To understand what the benefits of further growth in car club use could be, new modelling has been undertaken by TfL to support this Strategy. It looks at the potential benefits for London in terms of vehicle trips removed, environmental benefits and increased access to cars. The results

of this exercise can be found in Chapter 6 of the Strategy. Informed by the model outputs, the Coalition has agreed that the ambition should be 1 million members by 2025. A degree of uncertainty in the modelling should be noted; it relies on evidence drawn exclusively from the experience of the round trip operating model but future growth of car clubs is likely to rely on a much wider range of operating models. As such, TfL's model is not a forecast for what will be achieved, but instead demonstrates what *might* be achieved through increased energy, activity and collaboration. Further modelling and analysis will need to be undertaken as more evidence from the one way and flexible models is made available and car clubs move from the early adopter audience to the mainstream.

The Coalition also agreed an ambition to achieve a vehicle to member ratio of 1:100 (currently 1:58). This would mean that 1 million members would require a total of 10,000 car club vehicles on London's streets, approximately representing a four-fold increase on current numbers of vehicles for a seven-fold increase in members.

The Car Club Strategy sets out the Coalition's vision, its pledge to work together with each other and the public sector partners, and its commitment to implementing ten actions that will help grow the car club market to deliver the associated benefits. The actions are related to the challenges identified by the Coalition and the boroughs. Responsibility for each action is designated to different parties within the Coalition, with support required from other parties including the boroughs. The publication of the Strategy is not the end of the story, but the starting point for future collaboration to implement the action and support the development of car clubs in a way that most benefits London. To this end, working groups will be established by London Councils and TfL to help tackle priority issues such as maximising the use of electric vehicles in car clubs; the boroughs will be invited to be part of these working groups as they are set up.

The Transport and Environment Committee is asked to endorse the Car Club Strategy and provide any final comments or questions to Rhona Munck, [rhonamunck@tfl.gov.uk](mailto:rhonamunck@tfl.gov.uk).

## **2. Financial Implications for London Councils**

There are no financial implications to the boroughs.

## **3. Legal Implications for London Councils**

There are no legal implications to the boroughs.

## **4. Equalities Implications for London Councils**

None

## **5. Background Papers**

None

## **APPENDIX 1 – Car Club Strategy**

## **APPENDIX 2 – Evidence Summary**