C Harmer and S Cairns

Carplus annual survey of car clubs
2010/2011
PUBLISHED PROJECT REPORT PPR567

Carplus annual survey of car clubs 2010/11

by Clare Harmer & Sally Cairns (TRL)

<table>
<thead>
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<th>Carplus annual survey of car clubs 2010/11</th>
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<tr>
<td>Client:</td>
<td>Carplus, Elizabeth Muggleton/Anna Morgan/Chas Ball</td>
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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Project Manager</td>
<td>Clare Harmer</td>
</tr>
<tr>
<td>Technical Referee</td>
<td>Sally Cairns</td>
</tr>
</tbody>
</table>
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**Headline results**

**Customer Service**
- 88% of members rated the car club services as good or very good.

**Car ownership**
- 79% of car club members do not own a car.
- A third of respondents have reduced the number of vehicles owned by their household since joining a car club.
- 30% respondents reported that they would have bought a car, had they not joined a car club.
- 61% respondents reported that, as a result of joining the car club, they are less likely to purchase a car in the next few years.
- This year’s data supports last year’s estimates that each car club vehicle represents a reduction of over 20 privately owned vehicles that have either been sold, or not purchased.

**Use of other modes**
- On average, car club members make relatively frequent use of other modes, including 66% of members who report using a local bus at least once a week, 78% who report making walking trips of 20 minutes or more at least once a week, and 32% who report cycling at least once a week.

**Operator data about car club vehicles and their use**
- On average, car club vehicles are typically 26% more efficient than the average UK car.
- Over 85% car club members hire vehicles less than once a month. Less than 2% hire vehicles on a weekly basis, or more frequently.
- The average mileage driven by a car club member in car club vehicles in 2010 was in the order of 450 miles a year (or 635 miles a year if those who did not use the vehicles in the previous 12 months were excluded).

**Survey data about general car use by car club members**
- 77% members report travelling as a car driver less than once per week.
- About 30% of car club members report making no car driver trips at all in the preceding month.
- Trip rates for car club members are considerably lower than those of the average license holder.
- The majority of car club members belong to relatively low mileage households. Even taking into account both car club vehicle and private mileage, 85% households with car club members do 5000 miles or less a year.
- The data for London-based members and joiners suggests that, whilst joining a car club reduces the proportion of people reporting that their household drives 500 miles or less a year (from 50% to 40%), this is balanced by a substantial reduction in the proportion reporting that their household drives over 3000 miles a year (from 41% to 20%).

**Carbon dioxide emissions and air pollution**
- Last year’s data suggested that, for car driver trips per person, car club members are typically producing roughly a quarter of the carbon dioxide emissions generated by the average British license holder, and up to a half of those generated by license holders in London. The same methodology would imply that this would also be the case for the air pollutants being generated from their respective driving activity. This year’s data provide no reason to suggest that these calculations are producing inappropriate estimates – indeed it is possible that, when considering differences at a household level, the carbon and air pollution gap is even greater.
1 Introduction

Car clubs have continued to grow dramatically. On 31st January 2011, there were 3,055 car club vehicles in place and 161,172 members. This compares with 2,259 car club vehicles and 112,298 members on the 1st February 2010; approximately 64,000 members in December 2008; and 32,000 members in December 2007. Growth has continued to be concentrated in London, though with a dramatic geographical dispersion of activities. This year’s annual survey received responses from over 400 locations (compared with 46 locations last year).

In spring 2011, TRL was commissioned to analyse the results of the annual Carplus survey, based on data obtained from the individual clubs by Carplus. This represents the fourth wave of annual surveying of car club members. This report outlines the findings of this analysis, concentrating on the results of the survey. Although the findings have a number of policy implications, such implications are outside the scope of this report.

2 The survey

In 2007, Carplus set up a standardised data collection system to assess the impacts of car clubs. Over time, there have been a number of modifications to the process (as discussed below), but there are two core components - surveys of people who have been members of a car club for at least 6 months (‘members’), and surveys of those who have recently joined a car club (‘joiners’).

Established ‘members’ surveys

The first annual survey was conducted in autumn/winter 2007, with a second (simplified) survey in autumn/winter 2008 and a third in autumn/winter 2009. All non-accredited operators are invited to take part in the survey, while accredited operators are obliged to join in under the criteria of the scheme. In 2010, members were invited to complete the survey between November 2010 and January 2011. Each club developed its own web-based survey, based on a standard survey template. (Carplus went to considerable effort to ensure that the questions used were the same by all clubs.) As an incentive for members to complete the survey, each member completing the survey was entered into a prize draw, with the winner receiving 10 hours free driving. In some cases, the survey questions were incorporated into a larger survey that the club was undertaking for various reasons. The intention is that the survey is only completed by people who have already been car club members for at least 6 months, to avoid members getting ‘survey fatigue’, following completion of their joiner’s survey, and to ensure that their behaviour has ‘adjusted’ to having the car club available. This year, various processes were put in place to ensure that this was the case, as reported in the footnote to the section on response rates. Hence, all of the responses received to the annual survey analysed here are from people who have been members for at least 6 months. Throughout this report, these respondents are referred to as ‘members’.

---


4 This was largely successful, although there were some differences. These are discussed in relation to individual questions as they arise in later sections of the report.
`Joiners’ surveys
The joiners survey is sent to all new members as part of a customer care email, within 4 weeks of them signing up to a car club. They receive 1 hour free driving if they complete the survey. The survey stresses the need for joiners to answer the questions about their travel habits as they were prior to joining the club. Throughout this report, these respondents are referred to as ‘joiners’.

The surveys used are given in Appendices A and B.

Comparing members and joiners
The surveys are largely the same, except that joiners are asked for age and gender, and are asked for slightly less information about their travel behaviour. The main difference is that, where they are asked about travel behaviour, joiners are asked about pre-joining behaviour and members are asked about existing behaviour. In later parts of the report, the responses from joiners are compared with members as a potential proxy for assessing how travel behaviour changes as a result of car club membership. However, there are a number of limitations with this approach. For example, if the nature of the membership is changing over time, then this comparison is not really comparing ‘like with like’. Equally, it is possible that people make fairly substantial changes to their travel behaviour before ever becoming a member, meaning that they are somewhat in transition at the time they join a club, and previous travel patterns may not be effectively captured. Finally, there is potential for sample bias for both joiners and members, given that the surveys rely on self-completion.

Modifications to the survey in 2010
Following on from last year’s analysis, various modifications were made to the members and joiners surveys. These included:

- The introduction of a more consistent process for ensuring that member responses were only analysed from those who had been members for at least 6 months.
- Discussion about clubs retaining details enabling them to individually identify respondents, as something of potential value for future research.
- Some tidy-up of answer options – for example, ensuring that all clubs offered a ‘don’t know’ option to questions, where appropriate, and that households included company or lease cars in their total of household cars.
- The introduction of a new question about the impacts of car club membership on future car purchasing habits.
- The introduction of a new question asking directly about annual household car mileage (broken down by car).
- Ensuring that frequency of use of cars as a driver or passenger was asked about separately.
- The introduction of a new question asking about any car trips undertaken in the previous month (partly given previous queries about the high numbers of members who appear to make very infrequent use of the club).
- Alteration of the question about the distance of trips made, to ask about trips in the last week, as opposed to the last month, given concerns about the accuracy of answers obtained in the last survey.
- Obtaining more specific comparative data from the National Travel Survey and the London Travel Demand Survey.

Response rates to members and joiners surveys
In total, 5 clubs provided survey information, representing the majority of all UK car club members. Of these, three clubs supplied data for both joiners and members, whilst two clubs only provided information for members. Information was received from 8,450 respondents in total. This breaks down as follows.
• **Members:** There were responses from 7,662 members in total⁵. Between the clubs, the response rates ranged from 1% to 6%, with the total response rate for members of these clubs being 4%.

• **Joiners:** There were 1184 responses from joiners.

In comparison, the 2007 survey received 1141 responses in total, the 2008 survey received 5,924 responses, (4,460 members and 1,464 joiners), whilst the 2009 survey received 5,382 responses (4,687 members and 695 joiners).

As discussed in section 3, this year’s survey appears to have encouraged a higher level of reporting from those outside London, as opposed to those based in London. It is unclear why this is the case. In terms of impacts on results, it means that the positive results reported here are likely to be underestimating the positive impacts of car clubs, since, as discussed in Chapter 10, London respondents tend to have slightly more sustainable travel habits than non-London members.

**Operator data**

In addition to the surveys of members and joiners, the operators were also asked to supply information about car club members and their use of car club vehicles. This year, a formal survey tool was developed, as given in Appendix C. In various places, data received from all 5 operators has been combined to provide average figures for car club users, or car club hires. In all cases, this has been weighted by the respective size of each club, in order to provide accurate figures for the car club sector as a whole.

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⁵ Three clubs ensured that people who had been members for less than 6 months did not receive the survey, whilst two clubs surveyed all members, but asked for month of membership (if they joined in 2010), thereby enabling those who had been members for less than 6 months to be excluded from the results.
3 Location of car clubs and length of membership

3.1 Operator data on location

Operators were asked to provide information on the location of all of the members who belong to their car clubs. The combined results are given in Table 3-1. As shown there, the majority of car club members (83%) are located in London.

Table 3-1: Location of car club members

<table>
<thead>
<tr>
<th>Location</th>
<th>Members by location (percentage)</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>82.9</td>
</tr>
<tr>
<td>England (outside of London)</td>
<td>14.5</td>
</tr>
<tr>
<td>Scotland</td>
<td>2.5</td>
</tr>
<tr>
<td>Wales</td>
<td>0.1</td>
</tr>
</tbody>
</table>

3.2 Survey responses on location

Respondents reported being members of car clubs at 404 different locations spread throughout the UK – a dramatic increase in geographic spread, given responses from only 46 locations in 2009/10.

Over 68% of all respondents were members of London-based car clubs, including 70% of members and 63% of joiners. This implies that the survey results reported here are potentially under-representing the behaviour of those who belong to clubs in London. This means that, in most cases, the positive results reported here are likely to be underestimating the positive impacts of car clubs, since, as discussed in Chapter 10, London respondents tend to have slightly more sustainable travel habits than non-London members.

Outside London, the biggest responses were from Edinburgh, Brighton and Bristol. Table 3-2 provides details of the most commonly reported locations for members, and for all of the locations reported for joiners. All locations of car clubs used by members and joiners responding to the survey are given in Appendix D.

Table 3-2: Frequency of response from members (for all locations with 10+ respondents)* and for all joiners

<table>
<thead>
<tr>
<th>Location</th>
<th>Members Frequency</th>
<th>Members Percent</th>
<th>Joiners Frequency</th>
<th>Joiners Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bath</td>
<td>39</td>
<td>0.6</td>
<td>15</td>
<td>1.3</td>
</tr>
<tr>
<td>Birmingham</td>
<td>32</td>
<td>0.5</td>
<td>12</td>
<td>1.0</td>
</tr>
<tr>
<td>Bolton</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>0.1</td>
</tr>
<tr>
<td>Bradford</td>
<td>-</td>
<td>-</td>
<td>3</td>
<td>0.3</td>
</tr>
<tr>
<td>Brighton</td>
<td>180</td>
<td>2.8</td>
<td>88</td>
<td>7.5</td>
</tr>
<tr>
<td>Bristol</td>
<td>147</td>
<td>2.3</td>
<td>60</td>
<td>5.1</td>
</tr>
<tr>
<td>Cambridge</td>
<td>61</td>
<td>1.0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Cardiff</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>0.1</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>284</td>
<td>4.4</td>
<td>148</td>
<td>12.5</td>
</tr>
<tr>
<td>Glasgow</td>
<td>18</td>
<td>0.3</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Guildford</td>
<td>14</td>
<td>0.2</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Hove</td>
<td>13</td>
<td>0.2</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Huddersfield</td>
<td>-</td>
<td>-</td>
<td>2</td>
<td>0.2</td>
</tr>
<tr>
<td>Leeds</td>
<td>60</td>
<td>0.9</td>
<td>23</td>
<td>2.0</td>
</tr>
<tr>
<td>Leicester</td>
<td>11</td>
<td>0.2</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Littlehampton</td>
<td>10</td>
<td>0.2</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>London Borough</td>
<td>Members Frequency</td>
<td>Members Percent</td>
<td>Joiners Frequency</td>
<td>Joiners Percent</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------</td>
<td>-----------------</td>
<td>-------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Barking &amp; Dagenham</td>
<td>11</td>
<td>1.6</td>
<td>6</td>
<td>0.9</td>
</tr>
<tr>
<td>Barnet</td>
<td>15</td>
<td>2.2</td>
<td>7</td>
<td>1.0</td>
</tr>
<tr>
<td>Bexley</td>
<td>12</td>
<td>1.7</td>
<td>0</td>
<td>0.0</td>
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<td>Brent</td>
<td>28</td>
<td>4.0</td>
<td>9</td>
<td>1.3</td>
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<td>0.3</td>
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<tr>
<td>City of Westminster</td>
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<td>14.3</td>
<td>90</td>
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<tr>
<td>Croydon</td>
<td>40</td>
<td>5.8</td>
<td>2</td>
<td>0.3</td>
</tr>
<tr>
<td>Ealing</td>
<td>11</td>
<td>1.6</td>
<td>49</td>
<td>7.2</td>
</tr>
<tr>
<td>Enfield</td>
<td>12</td>
<td>1.7</td>
<td>4</td>
<td>0.6</td>
</tr>
<tr>
<td>Greenwich</td>
<td>4</td>
<td>0.6</td>
<td>5</td>
<td>0.7</td>
</tr>
<tr>
<td>Hackney</td>
<td>11</td>
<td>1.6</td>
<td>11</td>
<td>1.6</td>
</tr>
<tr>
<td>Hammersmith &amp; Fulham</td>
<td>34</td>
<td>4.9</td>
<td>27</td>
<td>4.0</td>
</tr>
<tr>
<td>Haringey</td>
<td>1</td>
<td>0.1</td>
<td>10</td>
<td>1.5</td>
</tr>
<tr>
<td>Harrow</td>
<td>13</td>
<td>1.9</td>
<td>8</td>
<td>1.2</td>
</tr>
<tr>
<td>Havering</td>
<td>8</td>
<td>1.2</td>
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<td>0.0</td>
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<tr>
<td>Hillingdon#</td>
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<td>38</td>
<td>5.6</td>
</tr>
<tr>
<td>Hounslow</td>
<td>13</td>
<td>1.9</td>
<td>10</td>
<td>1.5</td>
</tr>
<tr>
<td>Islington</td>
<td>15</td>
<td>2.2</td>
<td>18</td>
<td>2.6</td>
</tr>
<tr>
<td>Kensington &amp; Chelsea</td>
<td>33</td>
<td>4.8</td>
<td>46</td>
<td>6.7</td>
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<td>Kingston upon Thames</td>
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<td>0.6</td>
</tr>
<tr>
<td>Lambeth</td>
<td>30</td>
<td>4.3</td>
<td>32</td>
<td>4.7</td>
</tr>
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<td>Lewisham</td>
<td>3</td>
<td>0.4</td>
<td>2</td>
<td>0.3</td>
</tr>
<tr>
<td>Merton</td>
<td>18</td>
<td>2.6</td>
<td>7</td>
<td>1.0</td>
</tr>
<tr>
<td>Newham</td>
<td>3</td>
<td>0.4</td>
<td>11</td>
<td>1.6</td>
</tr>
<tr>
<td>Redbridge</td>
<td>11</td>
<td>1.6</td>
<td>1</td>
<td>0.2</td>
</tr>
<tr>
<td>Richmond upon Thames</td>
<td>40</td>
<td>5.8</td>
<td>26</td>
<td>3.8</td>
</tr>
<tr>
<td>Southwark</td>
<td>24</td>
<td>3.5</td>
<td>33</td>
<td>4.8</td>
</tr>
<tr>
<td>Sutton</td>
<td>15</td>
<td>2.2</td>
<td>2</td>
<td>0.3</td>
</tr>
<tr>
<td>Tower Hamlets</td>
<td>53</td>
<td>7.6</td>
<td>92</td>
<td>13.5</td>
</tr>
</tbody>
</table>

* The table includes locations of members with 10 or more respondents, though percentages are calculated using the total for all valid member responses.

~ 834 members and 2 joiners did not answer the question on location.

Table 3-3 provides information on the specific London Boroughs in which the respondents are car club members.
3.3 Survey responses on length of membership

Members were asked how long they had belonged to a car club\(^6\). As illustrated in Table 3-4, in 2009/10, just under 40% of the respondents reported that they had been a member of a car club for one year or less, with the mean length of membership being 2.3 years. These data also indicate that the average length of membership is increasing over time, with 61.3% of members indicating that they have belonged to a car club for 2 or more years, compared with 57.1% in last year's survey and 47.5% in 2008/09. These data are illustrated graphically in Figure 3-1.

### Table 3-4: Length of car club membership (for existing members)

<table>
<thead>
<tr>
<th>Years of membership</th>
<th>2010/11</th>
<th>2009/10</th>
<th>2008/09</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Frequency*</td>
<td>Percent</td>
<td>Frequency</td>
</tr>
<tr>
<td>1</td>
<td>2781</td>
<td>38.7</td>
<td>2009</td>
</tr>
<tr>
<td>2</td>
<td>1787</td>
<td>24.9</td>
<td>1209</td>
</tr>
<tr>
<td>3</td>
<td>1168</td>
<td>16.3</td>
<td>859</td>
</tr>
<tr>
<td>4</td>
<td>741</td>
<td>10.3</td>
<td>381</td>
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<td>8</td>
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<td>0.3</td>
<td>25</td>
</tr>
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<tr>
<td>10</td>
<td>24</td>
<td>0.3</td>
<td>0</td>
</tr>
</tbody>
</table>

*80 respondents did not answer this item in 10/11. ~One respondent did not answer this item in 08/09.

<table>
<thead>
<tr>
<th>Average</th>
<th>2.3 years</th>
<th>2.1 years</th>
<th>1.7 years</th>
</tr>
</thead>
</table>

\* Since members were only asked which year they had joined, and not which month, there is a degree of inaccuracy in the analysis of the length of car club membership. However, a consistent approach to this calculation has been adopted in each year of the survey. Hence, since the purpose of this analysis is to get a general picture of length of membership and whether members are staying with car clubs, this process should be satisfactory. Members who have been with the car club for less than 6 months are excluded from the existing member survey.
4 Customer satisfaction

As shown in Table 4-1 and Figure 4.1, 88% of members rated the car club service as good or very good, whilst only 3% of members rated the service as poor or very poor.

Table 4-1: Members customer satisfaction levels

<table>
<thead>
<tr>
<th>Satisfaction level</th>
<th>2010/11*</th>
<th>2009/10#</th>
<th>2008/09</th>
<th>2007/08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent (%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very good</td>
<td>36</td>
<td>36</td>
<td>29</td>
<td>50</td>
</tr>
<tr>
<td>Good</td>
<td>52</td>
<td>43</td>
<td>51</td>
<td>44</td>
</tr>
<tr>
<td>Average</td>
<td>9</td>
<td>17</td>
<td>17</td>
<td>6</td>
</tr>
<tr>
<td>Poor</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Very poor</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Total responses</td>
<td>7194</td>
<td>4686</td>
<td>4460</td>
<td>1141</td>
</tr>
</tbody>
</table>

*72 respondents did not answer the question. # One respondent did not answer this question.

This year’s results are relatively similar to those from last year, though with a shift from ‘average’ to ‘good’. This is a reversal in trend from the last two years, when there were shifts to a higher proportion of ‘average’ responses. There are several possible explanations. One explanation is that satisfaction with clubs outside London may be higher. (Last year, 80% members’ responses were from London compared with 70% this year). Another is that the car club operators have improved their service offering. A third is that the wider economic changes (including the rise in fuel prices, and negative changes in the national economy) have increased the extent to which people value car clubs.

Figure 4-1: Customer satisfaction levels

This year’s results are relatively similar to those from last year, though with a shift from ‘average’ to ‘good’. This is a reversal in trend from the last two years, when there were shifts to a higher proportion of ‘average’ responses. There are several possible explanations. One explanation is that satisfaction with clubs outside London may be higher. (Last year, 80% members’ responses were from London compared with 70% this year). Another is that the car club operators have improved their service offering. A third is that the wider economic changes (including the rise in fuel prices, and negative changes in the national economy) have increased the extent to which people value car clubs.

7 One club had used the categories “very satisfied; satisfied; neutral, dissatisfied; and very dissatisfied” instead of “very good; good; average; poor; and very poor”, which affected responses from 301 members in 2010/11 and 255 members in 2009/10. However, previous analysis suggests that this will not have had a significant effect on results.
5 Socio-demographics of joiners

5.1 Operator data on gender and age

The operators were asked to provide information on the gender and age split of their car club members. In terms of gender, on average 69% of car club members are male and 31% are female (see Table 5-1). This compares to a gender split of 54% male and 46% female for national licence holders.

<table>
<thead>
<tr>
<th>Gender</th>
<th>Car Club 1</th>
<th>Car Club 2</th>
<th>Car Club 3</th>
<th>Car Club 4</th>
<th>Car Club 5</th>
<th>Total*</th>
<th>National licence holders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>71.6</td>
<td>62.0</td>
<td>58.0</td>
<td>56.0</td>
<td>80.0</td>
<td>69</td>
<td>54</td>
</tr>
<tr>
<td>Female</td>
<td>28.4</td>
<td>38.0</td>
<td>42.0</td>
<td>23.0</td>
<td>20.0</td>
<td>31</td>
<td>46</td>
</tr>
<tr>
<td>Unknown</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>21.0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

* These totals exclude data from car club 4 which had a significant number of unknowns. The gender splits including car club 4 are 60% male, 25% female and 15% unknown.

Data about the age split of car club members is provided in Table 5-2. The data indicates the dominance of members aged 25-34. These data are displayed graphically in Figure 5-1. Compared with the data for national license holders, the lack of members aged over 50 is particularly notable.

<table>
<thead>
<tr>
<th>Age</th>
<th>Car Club 1</th>
<th>Car Club 2</th>
<th>Car Club 3</th>
<th>Car Club 4</th>
<th>Car Club 5</th>
<th>Total</th>
<th>National licence holders</th>
</tr>
</thead>
<tbody>
<tr>
<td>17-20</td>
<td>6.0</td>
<td>0.6</td>
<td>1.2</td>
<td>1</td>
<td>3.0</td>
<td>2</td>
<td>3.1</td>
</tr>
<tr>
<td>21-24</td>
<td>19.0</td>
<td>2.7</td>
<td>6.1</td>
<td>4</td>
<td>12.7</td>
<td>6</td>
<td>13.4</td>
</tr>
<tr>
<td>25-29</td>
<td>23.4</td>
<td>9.3</td>
<td>10.8</td>
<td>20</td>
<td>17.6</td>
<td>19</td>
<td>19.4</td>
</tr>
<tr>
<td>30-34</td>
<td>18.9</td>
<td>14.1</td>
<td>12.8</td>
<td>26</td>
<td>18.8</td>
<td>23</td>
<td>19.4</td>
</tr>
<tr>
<td>35-39</td>
<td>12.6</td>
<td>12.4</td>
<td>14.9</td>
<td>18</td>
<td>14.6</td>
<td>16</td>
<td>19.4</td>
</tr>
<tr>
<td>40-44</td>
<td>8.1</td>
<td>10.5</td>
<td>13.9</td>
<td>13</td>
<td>10.4</td>
<td>12</td>
<td>21.6</td>
</tr>
<tr>
<td>45-49</td>
<td>5.1</td>
<td>8.4</td>
<td>12.5</td>
<td>8</td>
<td>8.5</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>50-54</td>
<td>3.3</td>
<td>6.6</td>
<td>11.5</td>
<td>4</td>
<td>5.4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>55-59</td>
<td>1.7</td>
<td>4.7</td>
<td>7.8</td>
<td>3</td>
<td>4.1</td>
<td>3</td>
<td>17.8</td>
</tr>
<tr>
<td>60+</td>
<td>1.8</td>
<td>4.7</td>
<td>8.6</td>
<td>3</td>
<td>4.9</td>
<td>3</td>
<td>24.6</td>
</tr>
<tr>
<td>No age recorded</td>
<td>0</td>
<td>26.1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>
In terms of the data received in the joiners’ survey on gender, 70% of those responding were male, whilst 30% were female. This indicates that survey is receiving responses in proportion to the gender share of members as indicated in the operator data.

This result is relatively similar to that reported in both the 2009/10 results and some research undertaken by Synovate for Transport for London in 2007. Hence, there is no evidence that the gender bias in the appeal of car clubs is diminishing, nor that it is strengthening.

The data from the joiners survey about age are summarised in Table 5-3.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Frequency/Percent</th>
<th>Frequency/Percent</th>
<th>Frequency/Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>24 or less*</td>
<td>190/16.4</td>
<td>73/10.5</td>
<td>5</td>
</tr>
<tr>
<td>25-34</td>
<td>404/34.9</td>
<td>294/42.3</td>
<td>50</td>
</tr>
<tr>
<td>35-44</td>
<td>287/24.8</td>
<td>186/26.7</td>
<td>29</td>
</tr>
<tr>
<td>45-54</td>
<td>157/13.6</td>
<td>97/13.9</td>
<td>11</td>
</tr>
<tr>
<td>55+</td>
<td>118/10.2</td>
<td>43/6.2</td>
<td>6</td>
</tr>
<tr>
<td>Total responses</td>
<td>1156</td>
<td>693</td>
<td>1375</td>
</tr>
</tbody>
</table>

*One car club incorrectly coded this range as under 24. They also used the range ‘over 60’ instead of ‘60+’.

# There were 28 non-respondents. ~ There were two non-respondents.

These data are roughly in line with the operator data, and still indicate the dominance of members aged 25-34, though there is some indication that the age profile of members may be widening over time. In the 2009/10 survey, 3.0 of joiners reported that they were aged 55-59 and 3.2% were aged 60+. In comparison, in the 2010/11 survey, 4.7 of joiners reported that they were aged 55-59 and 5.5% were aged 60+ or over 60.

---

8 This excludes 28 joiners who did not complete the question.

In brief, then, the data on age and gender implies that there may be some change in the age composition of members joining over time, though the changes appear to be relatively gradual, and new members are still more likely to be male (than female), and relatively young (in the 25-34 age band).
6 Car ownership

6.1 Overall levels of car ownership

Members and joiners were asked about the number of cars owned by their household before joining the car club and the number owned at the time of the survey. Table 6-1 summarises the responses. A large proportion of both members and joiners reported that their household did not own a car before joining the car club, specifically 54.2% members and 49.3% joiners. Meanwhile, the proportion of respondents owning 1, 2, or 3 cars all reduced after having joined a car club, while the proportion not owning a car increased substantially. In total, after joining, 79% of members and 68% of joiners reported not owning a car.

Comparative figures for 2009/10 were that, before joining, 63.2% members and 61.4% joiners reported that they did not own a car, whilst, after joining, the total proportion without a car rose to 85% of members and 81% of joiners. Hence, this year’s survey results are showing the same trends as in previous years, but car clubs are appealing to more car owners and some of those (though a smaller proportion than previously) are choosing to retain their vehicles. It is unclear whether this is observed because of a genuine change in the appeal of clubs, or because of the under-representation of London members. Further investigation by location (as given in Chapter 10) indicates that this change in profile is probably only true for car clubs in London – i.e. clubs in London are starting to appeal more to car owners, whilst the balance of appeal to car owners versus non-car owners outside London is the same as in the previous year.

Table 6-1: Numbers of cars owned by members’ and joiners’ households, before and after joining a car club

<table>
<thead>
<tr>
<th>Number of Cars</th>
<th>Members</th>
<th></th>
<th></th>
<th>Joiners</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Before*</td>
<td>After#</td>
<td></td>
<td>Before~</td>
<td>After†</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Frequency</td>
<td>%</td>
<td>Frequency</td>
<td>%</td>
<td>Frequency</td>
<td>%</td>
</tr>
<tr>
<td>0</td>
<td>3904</td>
<td>54.2</td>
<td>5677</td>
<td>79.0</td>
<td>563</td>
<td>49.3</td>
</tr>
<tr>
<td>1</td>
<td>2502</td>
<td>34.7</td>
<td>1168</td>
<td>16.2</td>
<td>378</td>
<td>33.1</td>
</tr>
<tr>
<td>2</td>
<td>618</td>
<td>8.6</td>
<td>260</td>
<td>3.6</td>
<td>169</td>
<td>14.8</td>
</tr>
<tr>
<td>More than 2</td>
<td>177</td>
<td>2.5</td>
<td>85</td>
<td>1.2</td>
<td>33</td>
<td>2.9</td>
</tr>
<tr>
<td>Total Responses</td>
<td>7201</td>
<td>7190</td>
<td>1143</td>
<td>1148</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*65 members did not answer this item. # 76 members did not answer this item.
~42 joiners did not answer this item (including four who did answer, but gave values of 12, 12, 12 and 23 which seem unlikely to be real values, and have therefore been excluded from all ensuing analysis).

36 joiners did not answer this item.

Three clubs asked explicitly for the number of cars owned. Two clubs gave the options ‘4 or more’ and ‘5 or more’. All those giving an answer option equivalent to more than 2 have been grouped together in this table.

6.2 Changes to levels of car ownership

From the data collected, it is possible to calculate changes in car ownership, as shown in Table 6-2. Of the members surveyed, 32.8% reported a reduction in the number of cars owned by their household, 63.2% reported no change, whilst 4.0% had increased the number. Meanwhile, 26.6% of joiners reported having reduced the number of cars owned by their household, 70.8% had made no change and 2.6% had increased the number. In total, 32.0% of all respondents reported getting rid of a car. Looking at total changes in reported vehicle numbers, including both increases and decreases, the implied reductions in the total numbers of vehicles were 2364 cars (for 7172 responding members), 305 cars (for 1136 responding joiners) and 2669 cars (for 8308 respondents in total).
It is notable that there were 285 people who reported getting rid of 2 or more cars. This may perhaps indicate that joining a car club has coincided, or been triggered by, a more substantial change in their lives, which has led to such a significant change in their household car ownership.

Table 6-2: Change in number of cars owned by household

<table>
<thead>
<tr>
<th>Change in number of cars owned†</th>
<th>Members</th>
<th>Joiners</th>
<th>All respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Frequency *</td>
<td>Percentage (%)</td>
<td>Frequency #</td>
</tr>
<tr>
<td>-5</td>
<td>8</td>
<td>0.1</td>
<td>0</td>
</tr>
<tr>
<td>-4</td>
<td>10</td>
<td>0.1</td>
<td>0</td>
</tr>
<tr>
<td>-3</td>
<td>28</td>
<td>0.4</td>
<td>1</td>
</tr>
<tr>
<td>-2</td>
<td>196</td>
<td>2.7</td>
<td>42</td>
</tr>
<tr>
<td>-1</td>
<td>2112</td>
<td>29.4</td>
<td>259</td>
</tr>
<tr>
<td>0</td>
<td>4529</td>
<td>63.1</td>
<td>804</td>
</tr>
<tr>
<td>1</td>
<td>275</td>
<td>3.8</td>
<td>24</td>
</tr>
<tr>
<td>2</td>
<td>13</td>
<td>0.2</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>0.0</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>0</td>
<td>0.0</td>
<td>1</td>
</tr>
</tbody>
</table>

Total responses                     7172   1136   8308

*94 members did not answer this item.
#42 joiners did not answer this item (including four who did answer, but gave values of 12, 12, 12 and 23 which seem unlikely to be real values, and have therefore been excluded from all ensuing analysis).
†Where respondents had answered either ‘4 or more’ or ‘5 or more’, in relation to their car ownership levels either before or after joining a car club, to avoid any inaccuracy, this was recoded as invalid and has not been included in the above data. In total, this affected a total of 1 member and 4 joiners, and inclusion or exclusion would therefore have had a negligible effect on results.

Figure 6-1 illustrates the differences between established members and new joiners. As in 2009/10, a slightly higher percentage of members report having reduced the number of cars owned, while a higher percentage of joiners report having made no change. The average length of membership for members is 2.3 years, and so it is likely that those who have joined a car club and stayed a member for a reasonable time have decided that they find the car club useful, are confident of its services and have had the time to make changes to their car ownership levels. Joiners, meanwhile, may still be in a period of indecision.

Figure 6-1: Change in number of cars owned by household
Comparable figures from 2009/10 were that, of the members surveyed, 25.5% reported a reduction in the number of cars owned by their household, 72.9% reported no change, while 1.6% had increased the number. Of the joiners, in 2009/10, 22.5% reported having reduced the number of cars, whilst 76.5% had made no change and 1.0% had increased the number of cars.

6.3 Effects of car club membership on previous car purchasing decisions

Respondents were asked whether they would have bought a private car had they not become a member of a car club. As outlined in Table 6-3, 30.6% members and 28.6% of joiners stated that they would have done (equating to 30.3% of all respondents).

<table>
<thead>
<tr>
<th>Member Type</th>
<th>If you had not joined a club would you have bought a private car? (%)</th>
<th>Number of respondents~</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>30.6</td>
<td>41.2</td>
</tr>
<tr>
<td>Joiners</td>
<td>28.6</td>
<td>61.3</td>
</tr>
<tr>
<td>All respondents</td>
<td>30.3</td>
<td>44.0</td>
</tr>
</tbody>
</table>

~162 members did not reply to this question; 28 joiners did not reply to this question.

Comparing with 2009/10 data is problematic, since only one car club, with 930 responses, gave members the response option ‘not sure’ (i.e. equivalent to the ‘don’t know’ of this year’s survey). For this club, the percentage responses were 23.2% yes, 29.0% not sure and 47.7% no. The implication is that car clubs are continuing to appeal to a significant proportion of people who might otherwise have bought a car, and it is possible that this proportion is increasing – though a lack of data makes it impossible to be sure about this.

6.4 Effects of car club membership on future car purchasing decisions

As a new question this year, respondents were asked whether joining a car club has made it more or less likely that they will buy their own car (or another car) in the next few years. This question was added given considerable policy interest in how car clubs affect people’s overall trajectories of car ownership over time – for example, by giving non-car-owners the ‘taste’ of car ownership, it is plausible that they might speed up private purchase decisions, whilst, alternatively, by providing an option that provides many of the advantages of private car use, it is plausible that they might delay private purchase decisions. As with all aspects of car club use, it is likely that there will be groups of car club members who fall into each of these categories – the key issue is the balance between these groups.

As outlined in Table 6-4, only 8.2% of members and 6.3% of joiners reported that they are more likely to purchase a car (or another car) in the next few years, equating to 8.0% of all respondents. In dramatic contrast, 61.3% of members and 54.7% of joiners reported that they were less likely to purchase a car, equating to 60.8% of all respondents. The remaining 25.8% reported that joining the car club has had no effect on future purchase decisions. Overall, then, on balance, the dominant effect of car clubs is to encourage delayed purchase of private vehicles, not to speed them up – another positive effect on vehicle ownership.
### Table 6-4: Intention to purchase a new car in the future

<table>
<thead>
<tr>
<th>Member Type</th>
<th>More Likely</th>
<th>Less Likely</th>
<th>No effect</th>
<th>Don’t Know</th>
<th>Number of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members*</td>
<td>8.2</td>
<td>61.3</td>
<td>25.3</td>
<td>5.3</td>
<td>7132</td>
</tr>
<tr>
<td>Joiners#</td>
<td>6.3</td>
<td>54.7</td>
<td>33.0</td>
<td>5.9</td>
<td>539</td>
</tr>
<tr>
<td>All respondents</td>
<td>8.0</td>
<td>60.8</td>
<td>25.8</td>
<td>5.3</td>
<td>7671</td>
</tr>
</tbody>
</table>

* 134 members did not reply to this question.
# 28 joiners did not reply to this question. In addition, one car club, with 617 respondents, did not ask this question.

## 6.5 Overall impacts of car clubs on car ownership

The 2009/10 data suggested that, for every car club vehicle on the road, members had sold approximately 11 private cars. Allowing for the high proportion of people who also said that they would otherwise have bought a car, then scaling down to allow for potential overlap in responses indicated that, in total, each car club vehicle represented a reduction of over 20 privately owned vehicles that had either been sold, or not purchased. (These figures included calculations to avoid double counting from members who were part of the same household).

This year, the underlying data tell an even more positive story, in terms of ‘cars off the road’. Specifically:

- There are now more car club members per car club vehicle (approx 53 as opposed to approx 50 in 2009/10).
- 32.0% respondents reported that they had got rid of a vehicle (compared with 25.1% in 2009/10).
- 30.3% respondents reported that they would otherwise have bought a car (compared with between 30 and 32% in 2009/10, the range depending on the variation in question asked).
- 60.8% respondents reported that their likelihood of buying a car in the next few years has been reduced (compared with only 8% who reported that it had increased).

Using only the data obtained from the questions discussed in the first two bullets\(^\text{10}\) – and using a 5% adjustment to allow for potential double counting (i.e. that two people from the same household could both be reporting getting rid of the same car), would indicate that, on average, for every car club car on the road, members have sold approximately 16 private cars. Adding in the proportion of members who say that they would otherwise have bought a car, or would have been more likely to do so, would increase this figure substantially. This means that last year’s estimate of a reduction of over 20 privately owned vehicles that had either been sold, or not purchased is likely to be relatively conservative.

In relation to these points, clearly, it is not possible to tell exactly how many people would \textit{actually} have bought a new vehicle, nor is it possible to assume that the reduction in privately owned cars by members is entirely due to car club membership or that people’s assessment of the effects on car club membership on their future purchasing decisions is necessarily accurate. However, it does seem clear that the impacts of car clubs on reducing private vehicle ownership are substantial.

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\(^{10}\) I.e. First, that each car club member adds 0.01895 car club cars to the road; and second, that in the sample, 8308 respondents specifically reported getting rid of 2669 cars.
7 Frequency of travel by modes other than the car

7.1 Introduction

Members were asked "Typically, how often do you make a trip by each of these types of transport? (please count a return journey as 2 trips)", and given a list of modes, plus response options.

Joiners were asked the same question, except that the phrase 'before you joined the car club' was added at the beginning of the question.

As well as asking about car use, (discussed in more detail in section 9), the modes listed were:

- Ordinary bus (i.e. not express buses or coaches)
- Train
- Underground, metro or other tram
- Taxi or minicab
- Bicycle
- Walking for 20 minutes or more without stopping

A full set of the data collected through the Carplus survey is given in Appendix E. For all categories except 'underground, metro or other tram', equivalent questions are asked in the National Travel Survey. For example, the definition of walking was deliberately chosen to match with the National Travel Survey definition. Some of the same categories are also used in the London Travel Demand Survey.

7.2 Comparing members and joiners

Table 7-1 compares the relative frequency with which members and joiners report using different modes of transport (other than the car).

<table>
<thead>
<tr>
<th>Mode</th>
<th>At least once per week</th>
<th>Less than that but at least once per month</th>
<th>Less than that</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ordinary bus</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joiners</td>
<td>61.9</td>
<td>19.5</td>
<td>18.7</td>
</tr>
<tr>
<td>Members</td>
<td>66.2</td>
<td>17.9</td>
<td>16.0</td>
</tr>
<tr>
<td><strong>Train</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joiners</td>
<td>31.2</td>
<td>35.5</td>
<td>33.3</td>
</tr>
<tr>
<td>Members</td>
<td>40.8</td>
<td>32.0</td>
<td>27.3</td>
</tr>
<tr>
<td><strong>Underground, metro or other tram</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joiners</td>
<td>49.1</td>
<td>18.5</td>
<td>32.4</td>
</tr>
<tr>
<td>Members</td>
<td>65.6</td>
<td>15.4</td>
<td>19.0</td>
</tr>
<tr>
<td><strong>Taxi or minicab</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joiners</td>
<td>21.3</td>
<td>36.5</td>
<td>42.2</td>
</tr>
</tbody>
</table>
In brief, these results suggest that, compared to pre-joining behaviour, car club members make more frequent journeys by public transport and by bicycle. The only category where this is not the case is ‘walking for 20 minutes+’ – potentially indicating that some car club members potentially drive a few journeys that they would previously have walked. However, it should also be noted that, in most cases, the differences between the two groups are relatively small compared to differences between members and the general public, as discussed next.

7.3 Comparing member data with national data sources

Table 7-2 compares the data for all members with information on license holders from the National Travel Survey, whilst Table 7-3 compares the data for all London members with data on license holders from both the National Travel Survey (for all London boroughs) and the London Travel Demand survey, from 2009. The comparison between London members and general London data has been included, given the high proportion of respondents from London and the fact that travel patterns in London are typically different to those in the rest of the country.

Table 7-2: Comparing all members with all National Travel Survey respondents (license holders)*

<table>
<thead>
<tr>
<th>Mode</th>
<th>At least once per week</th>
<th>Less than that but at least once per month</th>
<th>Less than that</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ordinary bus</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>66.2</td>
<td>17.9</td>
<td>16.0</td>
</tr>
<tr>
<td>NTS respondents</td>
<td>16</td>
<td>12</td>
<td>72</td>
</tr>
<tr>
<td><strong>Train</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>40.8</td>
<td>32.0</td>
<td>27.3</td>
</tr>
<tr>
<td>NTS respondents</td>
<td>6</td>
<td>14</td>
<td>18</td>
</tr>
<tr>
<td><strong>Taxi or minicab</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>23.5</td>
<td>37.1</td>
<td>39.4</td>
</tr>
<tr>
<td>NTS respondents</td>
<td>6</td>
<td>19</td>
<td>75</td>
</tr>
<tr>
<td><strong>Bicycle</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>31.6</td>
<td>11.0</td>
<td>57.43</td>
</tr>
<tr>
<td>NTS respondents</td>
<td>9</td>
<td>12</td>
<td>79</td>
</tr>
<tr>
<td><strong>Walking for 20 mins+</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>77.8</td>
<td>10.7</td>
<td>11.5</td>
</tr>
</tbody>
</table>
Table 7-3: Comparing all London-based members with London-based National Travel Survey respondents and London Travel Demand Survey data (license holders)

<table>
<thead>
<tr>
<th>Mode</th>
<th>At least once per week</th>
<th>Less than that but at least once per month</th>
<th>Less than that</th>
<th>Members</th>
<th>NTS respondents</th>
<th>LTDS respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ordinary bus</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>70.3</td>
<td>16.3</td>
<td>13.5</td>
<td>70.3</td>
<td>57</td>
<td>46.6</td>
</tr>
<tr>
<td>NTS respondents</td>
<td>57</td>
<td>16</td>
<td>27</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LTDS respondents</td>
<td>46.6</td>
<td>21.1</td>
<td>32.3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Train</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>41.7</td>
<td>31.1</td>
<td>27.2</td>
<td>41.7</td>
<td>17</td>
<td>19.2</td>
</tr>
<tr>
<td>NTS respondents</td>
<td>17</td>
<td>22</td>
<td>61</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LTDS respondents</td>
<td>19.2</td>
<td>22.7</td>
<td>58.1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Underground, metro or other tram</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>74.9</td>
<td>14.2</td>
<td>10.9</td>
<td>74.9</td>
<td>38.1</td>
<td>38.1</td>
</tr>
<tr>
<td>LTDS respondents~</td>
<td>38.1</td>
<td>25.5</td>
<td>36.4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Taxi or minicab</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>24.7</td>
<td>36.4</td>
<td>38.9</td>
<td>24.7</td>
<td>8</td>
<td>5.9</td>
</tr>
<tr>
<td>NTS respondents</td>
<td>8</td>
<td>23</td>
<td>69</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LTDS respondents*</td>
<td>5.9</td>
<td>13.8</td>
<td>80.3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Bicycle</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>30.3</td>
<td>10.7</td>
<td>59.0</td>
<td>30.3</td>
<td>7</td>
<td>12.8</td>
</tr>
<tr>
<td>NTS respondents</td>
<td>7</td>
<td>6</td>
<td>87</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LTDS respondents</td>
<td>12.8</td>
<td>5.8</td>
<td>81.4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Walking for 20 mins+</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>76.8</td>
<td>11.4</td>
<td>11.8</td>
<td>76.8</td>
<td>62</td>
<td>62</td>
</tr>
<tr>
<td>NTS respondents</td>
<td>62</td>
<td>11</td>
<td>27</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

~Data is for underground use only. *Data is for London taxi/ black cab only. # LTDS asks about any walk longer than 5 minutes, which 51% of London license holders report that they do at least once per week. NTS results reported to zero decimal places, in line with NTS reporting conventions.

Both tables given above indicate that car club members make considerably more frequent trips by public transport, taxi, walking and cycling than the general public. This indicates that car club membership is probably relatively synergistic with more varied and sustainable travel patterns. Results for the proportions making trips ‘at least once a week’ are shown in Figures 7.1 and 7.2.
Figure 7-1 Frequent travel by different means by car club members compared with British license holders

Figure 7-2 Frequent travel by different means by London car club members compared with data about London license holders
8 Operator data about car club vehicle use

8.1 Data about car club vehicle use

As outlined in section 2, operators were asked to provide information about the nature of car club use, in order to gain an understanding of the use of car club vehicles by car club members. Five clubs, representing the majority of car club members, provided summary statistics, as given in Table 8-1. It should be noted that these are for all car club members, and therefore provide a full and accurate picture of car club use.

<table>
<thead>
<tr>
<th>Table 8-1: Summary of car club vehicle use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean average distance per hire (miles)</td>
</tr>
<tr>
<td>Club 1</td>
</tr>
<tr>
<td>---------------</td>
</tr>
<tr>
<td>44.4</td>
</tr>
<tr>
<td>Hires per member per year</td>
</tr>
<tr>
<td>8.4</td>
</tr>
<tr>
<td>Length of average hire period (hours)</td>
</tr>
<tr>
<td>9.03</td>
</tr>
<tr>
<td>Implied miles per year per member</td>
</tr>
<tr>
<td>373.0</td>
</tr>
<tr>
<td>Implied miles per year per member (excluding those who made no use of the club in the previous 12 months)</td>
</tr>
<tr>
<td>521.6</td>
</tr>
</tbody>
</table>

* Annual rate based on data for the last 6 months.
~ Average weighted by membership numbers

Data for individual clubs are given, since, although there are differences, it is clear that, in all cases, the average frequency of use is low, and total average car use per member is also low – with a weighted average of only 451.4 miles per car club member per year or 635.9 miles per year, if members making no car trips in the previous 12 months are excluded11.

Most of the clubs also provided details about the distribution of hires and distances. The weighted averages of these are given in Figure 8-1 and Figure 8-2.

---

11 These figures are somewhat higher than those calculated in last year’s survey. This year’s figures are likely to be more accurate, given a more comprehensive data collection exercise, together with better information with which to calculate the weighted averages.

12 One car club did not respond to this question.
The information about the number of hires per member per year reinforces the average data in indicating that most members’ use of the car club is relatively infrequent. For the four clubs that provided data, the proportion of members who hire a vehicle up to only 5 times is more than 75%, and 85.8% hire vehicles 10 times or less a year (i.e. less than once per month). Meanwhile, the proportion of members that hire vehicles 26 or more times a year (roughly equivalent to once a fortnight) averages only 3.6%. The proportion of members hiring vehicles more than 50 times a year (roughly equivalent to once a week) averages only 1.1%.

For the four car clubs, it is clear that there is a substantial proportion of members (29%) who have not hired a car club vehicle at all in the preceding year. Given that car clubs charge an annual, or monthly, membership fee, it is interesting to speculate on the benefit that these members derive from membership – perhaps it is providing ‘insurance’ in case they need a vehicle (instead of buying a first or second car).

As shown in Figure 8-2, the information about distance travelled per car club hire clarifies that the majority of trips (64% trips) are up to 25 miles. (This constitutes 94% of the average license holder’s car driver trips, according to the 2008 National Travel Survey). However, it is also clear that vehicles are being used for more infrequent, longer car journeys.

![Figure 8-2: Miles travelled per hire](image)

The overall picture that emerges, then, is that car club vehicles are hired relatively infrequently, typically for a few long car journeys a year, and the overall mileage that each member drives is low – and dramatically lower than the mileage driven by an average license holder.

### 8.2 Evidence about car club vehicle emissions

The five clubs all provided data about the average emissions from their car club vehicles. These are summarised in Table 8-2.

<table>
<thead>
<tr>
<th>Club</th>
<th>Details about emissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club 1</td>
<td>Average is 139gCO₂/km. Emissions bands for cars range from &lt;=100 to 176-185gCO₂/km. Also has 2 vans which emit between 151-165gCO₂/km.</td>
</tr>
<tr>
<td>Club 2</td>
<td>Average is 120gCO₂/km. Emissions bands range between &lt;=100 and 186-200gCO₂/km.</td>
</tr>
<tr>
<td>Club 3</td>
<td>Average is 110.45gCO₂/km. Emissions bands range between &lt;=100 and</td>
</tr>
</tbody>
</table>
151-165gCO$_2$/km.

<table>
<thead>
<tr>
<th>Club 4</th>
<th>Average is 132.4gCO$_2$/km. Emissions bands for cars range between $\leq$100 and 166-175gCO$_2$/km. Also has 196 vans which emit between 186-200gCO$_2$/km.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club 5</td>
<td>Average is 114gCO$_2$/km. Emissions bands for cars range between 111-120 and 121-225gCO$_2$/km. Also has 7 vans which emit between 201-225gCO$_2$/km.</td>
</tr>
</tbody>
</table>

All operators also provided a more detailed breakdown of their car club fleet by emissions band. This is shown in Figure 8-3.

![Figure 8-3: Comparing the emissions bands of car club vehicles (excluding vans) with cars licensed by CO2 emission band in the UK](image)

A comparison of the two distributions indicates a marked difference – specifically car club vehicles are clustered at the lower end of the range, with particular peaks in the 111-120 and 141-150gCO$_2$/km. In contrast, the UK car fleet is clustered around an average vehicle emissions of 151-165gCO$_2$/km, with a much higher proportion of vehicles above this band.

Current DfT statistics$^{13}$ suggest that the average emissions for a UK car are currently 167.5gCO$_2$/km. The unweighted average of the five average emission figures given by the five car clubs is 123.2gCO$_2$/km which, as evident from Figure 8-3, appears to be a reasonable average. This means, then, that compared to the average UK car, car club vehicles tend to be 26% more efficient in terms of emissions of CO$_2$ per kilometre. These data are illustrated in Figure 8-4.

Figure 8-4 Comparing emissions from car club vehicles with average emissions from UK cars
9 Survey data about overall car use

9.1 Introduction
To assess the nature of car use by car club members, various questions were asked. These included:

- the frequency of car use as a driver and a passenger
- whether any car driver trips were made in the preceding month
- car driver trip rates by distance in the preceding week, and
- overall mileages travelled in car club vehicles, privately owned vehicles, and for all vehicles in the household.

In most cases, we are unable to make comparisons with last year’s data, as the questions have changed. The results for each question are discussed below, followed by a concluding section.

9.2 Frequency of car use
As outlined in section 7, members were asked a multi-modal question about:

“Typically, how often do you make a trip by each of these types of transport? (please count a return journey as 2 trips),”

and given a list of modes, plus response options.

Joiners were asked the same question, except that the phrase ‘before you joined the car club’ was added at the beginning of the question.

This year, clubs were requested to ask about the frequency of car driver and car passenger trips separately, partly to enable comparison with the London Travel Demand Survey.

For the joiners survey, one club did not do so, and hence their responses have been removed from the data analysis. Unfortunately, this removes most of the non-London responses from the joiners data. Therefore the car driver and car passenger member/joiners comparisons can only be made for London-based respondents.

9.2.1 As a car driver
The results for car use as a driver are given in Table 9-1. As outlined above, these data are only for London-based respondents. The differences between London and non-London respondents are discussed in section 10-6.

<table>
<thead>
<tr>
<th>Frequency of Trip</th>
<th>Joiners</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fr</td>
<td>%</td>
</tr>
<tr>
<td>3+ times a week</td>
<td>139</td>
<td>28.1</td>
</tr>
<tr>
<td>1-2 times a week</td>
<td>68</td>
<td>13.7</td>
</tr>
<tr>
<td>Less than that but at least 1 per month</td>
<td>110</td>
<td>22.2</td>
</tr>
<tr>
<td>Less than that but at least 1 per year</td>
<td>94</td>
<td>19.0</td>
</tr>
<tr>
<td>No trips made</td>
<td>84</td>
<td>17.0</td>
</tr>
<tr>
<td>Total valid responses</td>
<td>495</td>
<td></td>
</tr>
<tr>
<td>No responses</td>
<td>33</td>
<td></td>
</tr>
</tbody>
</table>
As might be expected, a substantially smaller proportion of members make frequent car driver trips. (Specifically, 22.8% members versus 41.8% joiners report travelling as a car driver at least once per week).

It is also interesting to compare these results with data for the general public. Unfortunately, the National Travel Survey does not ask a question about frequency of car use. However, the London Travel Demand Survey does. The results for London-based members are therefore compared to data for license holders from the London Travel Demand Survey in Table 9-2.

Table 9-2: Comparing the frequency of car driver trips by London-based car club members with data from the London Travel Demand Survey

<table>
<thead>
<tr>
<th>Frequency of Trip</th>
<th>Trips as car driver for London-based members:</th>
<th>LTDS – license holder trips as a car driver:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fr</td>
<td>%</td>
</tr>
<tr>
<td>3+ times a week</td>
<td>411</td>
<td>9.5</td>
</tr>
<tr>
<td>1-2 times a week</td>
<td>577</td>
<td>13.3</td>
</tr>
<tr>
<td>Less than that but at least 1 per month</td>
<td>1715</td>
<td>39.5</td>
</tr>
<tr>
<td>Less than that but at least 1 per year</td>
<td>952</td>
<td>21.9</td>
</tr>
<tr>
<td>No trips made</td>
<td>689</td>
<td>15.9</td>
</tr>
<tr>
<td>Total valid responses</td>
<td>4344</td>
<td></td>
</tr>
</tbody>
</table>

This indicates that a significantly higher proportion of London license holders make car driver trips at least once a week, compared with car club members – specifically 75.7% versus 22.8%. The extent of the difference is surprising. One possibility relates to the geographical spread of respondents – for example, LTDS may be particularly influenced by outer London residents, whilst car club members may typically be concentrated more centrally. However, it is not clear that this is necessarily the case. (It would be possible to analyse the data for LTDS by inner and outer London, and, separately, the data for car club members by inner and outer London - though this additional analysis was not within the scope of this report.)

9.2.2 As a passenger

The results for car use as a passenger are given in Table 9-3. As outlined above, these data are only for London-based respondents. The differences between London and non-London respondents are discussed in section 10-6.

Table 9-3: Frequency of travel as a car passenger (private car/car club vehicle) for London-based members and joiners

<table>
<thead>
<tr>
<th>Frequency of Trip</th>
<th>Joiners</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fr</td>
<td>%</td>
</tr>
<tr>
<td>3+ times a week</td>
<td>62</td>
<td>12.6</td>
</tr>
<tr>
<td>1-2 times a week</td>
<td>83</td>
<td>16.8</td>
</tr>
<tr>
<td>Less than that but at least 1 per month</td>
<td>179</td>
<td>36.3</td>
</tr>
<tr>
<td>Less than that but at least 1 per year</td>
<td>92</td>
<td>18.7</td>
</tr>
<tr>
<td>No trips made</td>
<td>77</td>
<td>15.6</td>
</tr>
</tbody>
</table>
Once again, a smaller proportion of members than joiners make frequent car passenger trips (specifically 18.3% members versus 29.4% joiners report travelling as a car passenger at least once per week). However, the difference is smaller than for car driving.

The results for London based members are then compared with data from the London Travel Demand Survey in Table 9-4.

### Table 9-4: Comparing the frequency of car trips as a passenger by London-based car club members with data from the London Travel Demand Survey

<table>
<thead>
<tr>
<th>Frequency of Trip</th>
<th>Trips as car passenger for London-based members:</th>
<th>LTDS – trips as a car passenger:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fr</td>
<td>%</td>
</tr>
<tr>
<td>3+ times a week</td>
<td>269</td>
<td>6.2</td>
</tr>
<tr>
<td>1-2 times a week</td>
<td>522</td>
<td>12.1</td>
</tr>
<tr>
<td>Less than that but at least 1 per month</td>
<td>1566</td>
<td>36.3</td>
</tr>
<tr>
<td>Less than that but at least 1 per year</td>
<td>962</td>
<td>22.3</td>
</tr>
<tr>
<td>No trips made</td>
<td>991</td>
<td>23.0</td>
</tr>
<tr>
<td>Total valid responses</td>
<td>4310</td>
<td></td>
</tr>
<tr>
<td>No response</td>
<td>170</td>
<td></td>
</tr>
</tbody>
</table>

Again, this indicates that the average London license holder makes more frequent car passenger trips than the average London-based car club member.

### 9.3 Car driver trips in the preceding month

One issue that arose last year related to the high proportion of members who reported making no car trips in the preceding month, when asked about specific travel behaviour. It was unclear whether they were answering accurately, or simply putting in zeros to skip the question (which, in its previous formulation, required considerable thought). As already indicated in Chapter 8, car clubs report that 29% of their members did not hire the car club vehicles in the preceding month – however, it was unclear whether this is typically people who have joined a club as a back-up in case their own vehicle breaks down. Therefore, partly to assess this issue, this year, members were asked:

“Did you make any trips as a car driver in the last MONTH?”

and joiners were asked:

“In the MONTH before joining the club did you make any trips as a car driver?”

The results are given in Table 9-5. As shown there, about 30% of respondents report not making any car driver trips at all. This indicates that many car club members are, indeed, very infrequent car users.

### Table 9-5: Car driver trips

<table>
<thead>
<tr>
<th>Member Type</th>
<th>Yes</th>
<th>No</th>
<th>Don’t Know</th>
<th>No response</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fr</td>
<td>%</td>
<td>Fr</td>
<td>%</td>
</tr>
<tr>
<td>Member</td>
<td>4724</td>
<td>66.8</td>
<td>2163</td>
<td>30.6</td>
</tr>
<tr>
<td></td>
<td>4724</td>
<td>2.6</td>
<td>194</td>
<td></td>
</tr>
<tr>
<td>Joiners*</td>
<td>351</td>
<td>65.2</td>
<td>165</td>
<td>30.7</td>
</tr>
<tr>
<td></td>
<td>351</td>
<td>4.1</td>
<td>29</td>
<td></td>
</tr>
</tbody>
</table>

* One car club did not ask this question for joiners.
9.4 Car driver trips in the preceding week

9.4.1 Question details

As a way of trying to understand the distribution of car trips that car club members make, members were asked:

"In the last WEEK, please give details about all the trips you have made as a CAR DRIVER. Please include both private car and car club trips. (Please record a return journey as 2 trips. Please put zeros in the boxes if you did not make any car driver trips of this length)"

They were given a series of mileage bands into which to input the data (50 miles and over; 25 to <50; 10 to <25; 5 to <10; <5).

A question of this formulation was also asked last year, but about travel in the last month. There are, inevitably, a number of problems with it, not least inaccurate reporting, and the fact that information about the typical travel of infrequent users is unlikely to be picked up by asking about travel in the last week. However, various checks were put in place to try to ensure more accurate responses this year.

(Joiners were not asked this question, given the difficulty of asking for this sort of information for a specific week before they joined, which could have been several weeks before).

Results, and their limitations, are discussed in the next section.

9.4.2 Evidence about trip rates

Average trip rates in the different distance bands are given in Table 9.6.

<table>
<thead>
<tr>
<th>Trips</th>
<th>50 miles +</th>
<th>25 to &lt;50</th>
<th>10 to &lt;25</th>
<th>5 to &lt;10</th>
<th>&lt;5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fr %</td>
<td>Fr %</td>
<td>Fr %</td>
<td>Fr %</td>
<td>Fr %</td>
</tr>
<tr>
<td>0</td>
<td>3703 81.3</td>
<td>3927 86.2</td>
<td>3748 82.3</td>
<td>3602 79.1</td>
<td>3730 81.9</td>
</tr>
<tr>
<td>1-4</td>
<td>778 17.1</td>
<td>555 12.2</td>
<td>670 14.7</td>
<td>741 16.3</td>
<td>583 12.8</td>
</tr>
<tr>
<td>5-8</td>
<td>45 1.0</td>
<td>45 1.0</td>
<td>78 1.7</td>
<td>131 2.9</td>
<td>128 2.8</td>
</tr>
<tr>
<td>9+</td>
<td>27 0.6</td>
<td>27 0.6</td>
<td>57 1.3</td>
<td>80 1.8</td>
<td>111 2.4</td>
</tr>
<tr>
<td>Average (per week)</td>
<td>0.5</td>
<td>0.4</td>
<td>0.6</td>
<td>0.7</td>
<td>0.8</td>
</tr>
<tr>
<td>Total Responses</td>
<td>4553</td>
<td>4554</td>
<td>4553</td>
<td>4554</td>
<td>4552</td>
</tr>
</tbody>
</table>

* One car club incorrectly asked members to provide information on monthly trips. Therefore their data is not included in this analysis.

Respondents reporting on zero trips have been retained in the analysis, following cross correlation with the previous question, which implied that these zeros are likely to be ‘real’ answers.

Respondents who put more than 30 trips a week into any one of the distance band boxes have been excluded from results, since examination of the data implied that these answers were most likely to be errors. This affected 96 responses.

These results can also be compared with National Travel Survey data about car/van driver trips. A specific subset of results has also been generated for London only, given

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14 National Travel Survey data have been converted from annual trip rates to monthly trip rates, by dividing by 12. Survey rates have been converted from weekly into monthly rates by multiplying by 52 and dividing by 12.
the large proportion of car club members based in London. Data are given in Table 9-7 and Table 9-8.

**Table 9-7: Comparing car/van driver trip rates (all respondents)**

<table>
<thead>
<tr>
<th>Trip length</th>
<th>0 to &lt;5</th>
<th>5 to &lt;10</th>
<th>10 to &lt;25</th>
<th>25 to &lt;50</th>
<th>50 and over</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Carplus survey data</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>3.4</td>
<td>3.2</td>
<td>2.5</td>
<td>1.7</td>
<td>2.1</td>
<td>12.9</td>
</tr>
<tr>
<td><strong>National Travel Survey data (2009)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>License holders</td>
<td>31.6</td>
<td>12.5</td>
<td>9.4</td>
<td>2.3</td>
<td>1.2</td>
<td>57.0</td>
</tr>
</tbody>
</table>

**Table 9-8: Comparing car/van driver trip rates (London respondents)**

<table>
<thead>
<tr>
<th>Trip length</th>
<th>0 to &lt;5</th>
<th>5 to &lt;10</th>
<th>10 to &lt;25</th>
<th>25 to &lt;50</th>
<th>50 and over</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Carplus survey data for London</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>3.3</td>
<td>3.1</td>
<td>2.4</td>
<td>1.5</td>
<td>1.9</td>
<td>12.2</td>
</tr>
<tr>
<td><strong>National Travel Survey data for London (2009)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>License holders</td>
<td>22.2</td>
<td>7.0</td>
<td>4.4</td>
<td>0.8</td>
<td>0.7</td>
<td>35.1</td>
</tr>
</tbody>
</table>

Taken together, whilst not conclusive, these results indicate that:

- Asking people to report in this way potentially results in a slight over-reporting of travel (since, compared with last year, rates recorded are slightly higher – and rates for 50 mile plus trips appear to be higher than those for the average license holder, which is unlikely to be a ‘true’ result).
- Patterns of car use are much ‘flatter’ by car club members than by the average license holder – i.e. whilst license holders’ car travel is concentrated on shorter journeys, this is not the case for car club members.
- Car driver trip rates for longer distance journeys may be similar to those of all license holders but are considerably less for shorter journeys
- Car driver trip rates are probably considerably lower overall.

### 9.5 Annual mileages

#### 9.5.1 Question details

As a final method of assessing car use, members were asked:

“For your car club use, and any cars that your household currently owns, what was the approximate mileage travelled in the last year?”

Members were asked to provide mileages separately for their use of car club cars, household car 1, household car 2 and other household cars.

They were asked to tick a relevant range, where the ranges given were:

Zero; 1-500; 501-1000; 1001-2000; 2001-3000; 3001-4000; 4001-5000; 5001-6000; 6001-7000; 7001-8000; 8001-9000; 9001-10,000; 10,001-15,000; 15,001-20,000; 20,001+; Don’t know
When analysing the data, those respondents who provided an inconsistent response between this question and the question ‘how many cars does your household own’ were excluded. This affected 596 respondents. When generating estimates of overall household mileage (which required addition of the ranges given for individual vehicles), the midpoint of each range was used.

One club amalgamated a number of the mileage ranges using the following:
Zero; 1-500; 501-1000; 1001-2000; 2001-3000; 3001-4000; 4001-5000; 5001-10,000; 10,001-15,000; 15,001+; Don't know.

This led to some issues when combining data from the different clubs, for those respondents reporting relatively high mileages. However, various analyses – where the results from this club were included or excluded – indicated that the eventual process used was relatively robust.

9.5.2 Data for members

This section summarises the data on annual household mileages driven by members and their households. Figure 9-1 illustrates use of car club vehicles; Figure 9-2 illustrates use of privately owned vehicles; and Figure 9-3 indicates the combined data, to give an illustration of total household mileage. Meanwhile, Table 9-9 provides a summary of the data given in Figure 9-3.

<table>
<thead>
<tr>
<th>Total annual household mileage~</th>
<th>Members*</th>
</tr>
</thead>
<tbody>
<tr>
<td>500 or less</td>
<td>39.6</td>
</tr>
<tr>
<td>501 – 1000</td>
<td>20.8</td>
</tr>
<tr>
<td>1001 - 3000</td>
<td>18.1</td>
</tr>
<tr>
<td>3001 – 5000</td>
<td>6.2</td>
</tr>
<tr>
<td>5001 – 10,000</td>
<td>8.0</td>
</tr>
<tr>
<td>10,001+</td>
<td>7.3</td>
</tr>
</tbody>
</table>

~ Figures for the combined use of car club vehicles and household cars
* 291 members ‘didn’t know’ their annual household mileage, while 819 did not respond to the question.

Taken together, these data indicate that the majority of car club members belong to relatively low mileage households, even when taking into account both car club vehicle and private mileage. 60.2% are in households which drive only 1000 miles or less a year; 78.5% drive less than 3000 miles a year; 84.7% drive 5000 miles or less a year; and only 7.3% of their households drive more than 10,000 miles.

As reported in section 8, the operator data suggest that the average mileage travelled by a car club member was 451.4 miles per year (including all members), or 635.9 miles per year (only including members who had hired a car in the previous 12 months). These figures suggest that the data given in Figure 9-1 is probably reasonably representative.

National travel survey data suggest that average annual household car mileage for all households with a license holder is 9,701, and for London households with a license holder, it is 3690. From the survey data, over 90% of all car club members drive 9,000 miles or less per annum, whilst over 80% of London members drive 3000 miles or less per annum. In other words, the majority of households with a car club member drive considerably less than the average household with a license holder.

Last year’s data suggested that, for all members, the average annual mileage driven per member was 2375, though with this value being particularly vulnerable to the high mileages undertaken by some members. For 99% members, the equivalent value was 1926 miles, whilst for 95% of members, the value was 1492 miles per year. This year’s data provides no reason to think that these values were too low.
This graph shows only mileages for those members who own one or more private vehicles. 79% of members did not own a car, implying that their private car mileage was zero. In addition, 1.7% of members owned cars but reported that they did zero mileage in the previous year. 78 members reported that they ‘didn’t know’ their private vehicle mileage and 284 provided no response.
9.5.3 Carbon dioxide emissions and air pollution implications

Based on the difference between average mileages for license holders, and those for car club members – and the fact that car club vehicles are typically more efficient than private cars – last year, it was concluded that, for car driver trips per person, car club members are typically producing roughly a quarter of the carbon dioxide emissions generated by the average British license holder, and up to a half of those generated by license holders in London. The same methodology would imply that this would also be the case for the air pollutants being generated from their respective driving activity (since we do not have the data to allow more sophisticated calculations on this issue – for example, information on the diesel:petrol split of car club vehicles – though it is unlikely that this would have a major effect on results). Again, this year’s data provide no reason to suggest that these calculations are inappropriate – indeed it is possible that, when considering information at a household level, the carbon and air pollution gap is even greater, though more analysis would be needed to conclude this with any certainty.

9.5.4 Comparing members and joiners

One car club (representing most of the non-London joiners) did not ask the question about car mileages. Therefore it has only been possible to compare London-based members and joiners. These data are given in Table 9-10 and Figure 9-4. The data for London-based members and joiners suggests that, whilst joining a car club reduces the proportion of people reporting that their household drives 500 miles or less a year (from 49.7% to 40.0%), this is balanced by a substantial reduction in the proportion reporting that their household drives over 3000 miles a year (from 40.7% to 19.8%).
Table 9-10: Total household mileage (London-based members and joiners)

<table>
<thead>
<tr>
<th>Annual Total Household Mileage</th>
<th>London Members*</th>
<th>London Joiners~</th>
</tr>
</thead>
<tbody>
<tr>
<td>500 or less</td>
<td>40.0</td>
<td>49.7</td>
</tr>
<tr>
<td>501 – 1000</td>
<td>21.4</td>
<td>3.7</td>
</tr>
<tr>
<td>1001 - 3000</td>
<td>18.8</td>
<td>6.0</td>
</tr>
<tr>
<td>3001 - 5000</td>
<td>6.2</td>
<td>7.7</td>
</tr>
<tr>
<td>5001 – 10,000</td>
<td>7.1</td>
<td>13.3</td>
</tr>
<tr>
<td>10,001+</td>
<td>6.5</td>
<td>19.7</td>
</tr>
<tr>
<td>Total Responses</td>
<td>3332</td>
<td>497</td>
</tr>
</tbody>
</table>

* 215 London members ‘didn’t know’ their annual household mileage, while 560 did not respond to the question.

~ 14 London joiners ‘didn’t know’ their annual household mileage, 29 did not respond to the question, while one car club with 211 London respondents did not ask this question.

Figure 9-4: Joiners annual household mileage

9.6 Summary

In summary:

- 77.2% members report travelling as a car driver less than once per week. After joining, there is a substantial reduction in the proportion travelling as a car driver at least once per week, coupled with a smaller, but still significant, reduction in the proportion travelling as a car passenger at least once per week.

- Comparing with London Travel Demand Survey data for license holders in London suggests that London-based car club members make considerably fewer car driver trips than the average license holder.

- About 30% of car club members report making no car driver trips at all in the preceding month.

- Trip rates for car club members are considerably lower than those for all license holders (as recorded in the National Travel Survey), with most of the difference relating to trip rates for shorter car journeys, particularly for trips of up to 25 miles (which account for 94% of the average license holder’s car/van mileage).

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16 49% of joiners did not own a car before joining, implying that their private car mileage was zero. In addition, 0.7% of joiners owned cars but reported that they did zero mileage in the previous year. 14 joiners reported that they ‘didn’t know’ their private vehicle mileage, 29 provided no response and one car club (with 617 respondents) did not ask this question.
• The majority of car club members are relatively low mileage drivers, even when taking into account both car club vehicle and private mileage. 60.2% do only 1000 miles or less a year; 84.7% do 5000 miles or less a year; and only 7.3% do more than 10,000 miles.

• The data for London-based members and joiners suggests that, whilst joining a car club reduces the proportion of people reporting that their household drives 500 miles or less a year (from 49.7% to 40.0%), this is balanced by a substantial reduction in the proportion reporting that their household drives over 3000 miles a year (from 40.7% to 19.8%).

• Last year’s data suggested that, for car driver trips per person, car club members are typically producing roughly a quarter of the carbon dioxide emissions generated by the average British license holder, and up to a half of those generated by license holders in London. The same methodology would imply that this would also be the case for the air pollutants being generated from their respective driving activity. This year’s data provide no reason to suggest that these calculations are producing inappropriate estimates – indeed it is possible that, when considering differences at a household level, the carbon and air pollution gap is even greater.
10 Comparing London and non-London members

10.1 Introduction
This section of the report compares the information from London members with non-London members, to illustrate the differences in relation to location.

10.2 Gender and age
According to data received in the joiners’ survey, a higher proportion of London members are likely to be male (77% of joiners), compared with non-London members (61% of joiners). Table 10-1 compares the age profiles for London and non-London joiners. As discussed more generally, the data for both locations indicate the dominance of members aged 25-34, though there is some indication that car clubs outside London are attracting a wider spread of ages, given a higher proportion of joiners aged 35+.

Table 10-1: Comparing the age profiles for London and Non-London joiners

<table>
<thead>
<tr>
<th></th>
<th>London#</th>
<th></th>
<th>Non-London</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Frequency</td>
<td>Percent</td>
<td>Frequency</td>
<td>Percent</td>
</tr>
<tr>
<td>24 or less*</td>
<td>136</td>
<td>19.1</td>
<td>53</td>
<td>12.0</td>
</tr>
<tr>
<td>25-34</td>
<td>262</td>
<td>36.8</td>
<td>141</td>
<td>31.8</td>
</tr>
<tr>
<td>35-44</td>
<td>167</td>
<td>23.5</td>
<td>120</td>
<td>27.1</td>
</tr>
<tr>
<td>45-54</td>
<td>85</td>
<td>12.0</td>
<td>72</td>
<td>16.3</td>
</tr>
<tr>
<td>55+</td>
<td>61</td>
<td>8.6</td>
<td>57</td>
<td>12.9</td>
</tr>
<tr>
<td>Total responses</td>
<td>1156</td>
<td></td>
<td>693</td>
<td></td>
</tr>
</tbody>
</table>

* One club incorrectly coded this range as under 24.
# There were 28 non-respondents.

10.3 Length of membership
As illustrated by Table 10-2, a slightly higher proportion of London members report having been a member for one year or less, (39% of respondents), compared with non-London members (36% of respondents). The same was true in the last two years, though the difference was even more marked, specifically 45% versus 33% in 2009/10 and 56% versus 34% in 2008/09). Presumably, this reflects the fact that car clubs were first established in the UK in locations such as Edinburgh. However, the diminishing differential perhaps indicates that car clubs generally attract people as members who stay members, rather than suffering from rapid churn. (However, more information would be needed to address this issue directly).
Table 10-2: Length of Car Club Membership, inside and out of London

<table>
<thead>
<tr>
<th>Years a member</th>
<th>London Members (%)</th>
<th>Non-London Members (%)</th>
<th>London Members (%)</th>
<th>Non-London Members (%)</th>
<th>London Members (%)</th>
<th>Non-London Members (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 or less</td>
<td>39.2</td>
<td>35.9</td>
<td>45.2</td>
<td>33.0</td>
<td>56.4</td>
<td>33.8</td>
</tr>
<tr>
<td>2</td>
<td>26.1</td>
<td>22.8</td>
<td>25.5</td>
<td>27.0</td>
<td>28.5</td>
<td>31.0</td>
</tr>
<tr>
<td>3</td>
<td>16.3</td>
<td>17.0</td>
<td>17.8</td>
<td>20.8</td>
<td>11.0</td>
<td>19.4</td>
</tr>
<tr>
<td>4</td>
<td>10.3</td>
<td>10.3</td>
<td>8.1</td>
<td>8.0</td>
<td>3.2</td>
<td>7.0</td>
</tr>
<tr>
<td>5</td>
<td>5.7</td>
<td>7.4</td>
<td>2.5</td>
<td>4.6</td>
<td>0.7</td>
<td>3.9</td>
</tr>
<tr>
<td>6</td>
<td>1.8</td>
<td>3.5</td>
<td>3.5</td>
<td>2.9</td>
<td>0.2</td>
<td>4.8</td>
</tr>
<tr>
<td>7</td>
<td>0.5</td>
<td>0.8</td>
<td>0.1</td>
<td>1.3</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>8</td>
<td>0.1</td>
<td>0.8</td>
<td>0.1</td>
<td>2.3</td>
<td>0.0</td>
<td>0.1</td>
</tr>
<tr>
<td>9</td>
<td>0.1</td>
<td>0.4</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>10</td>
<td>0.1</td>
<td>1.1</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
</tbody>
</table>

*74 London members and 4 non-London members did not answer this question. In addition, 834 respondents did not answer did not give a location and are therefore excluded from this analysis. #22 respondents did not answer did not give a location and are therefore excluded from this analysis.

10.4 Car ownership

The number of cars owned by members living in London, and members living elsewhere, both before joining the car club and at the time of the survey, are given in Table 10-3. Both within and outside London, it is clear that membership of a car club is associated with reductions in personal car ownership. However, within London, compared with elsewhere, there is a higher proportion of households who do not own a car before joining (56% versus 49%), and some difference remains, even after people become members (with the proportion not owning a car being 80% in London compared with 75% outside London). As discussed earlier, compared with 2009/10, the proportion of car owners becoming members seems to have increased in London, but not outside London (though it still remains higher outside London in absolute terms).

Table 10-3: Numbers of cars owned by members from inside and outside London*

<table>
<thead>
<tr>
<th>Number of Cars</th>
<th>Before Joining</th>
<th>After Joining</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Freq.</td>
<td>%</td>
</tr>
<tr>
<td>0</td>
<td>2479</td>
<td>55.8</td>
</tr>
<tr>
<td>1</td>
<td>1494</td>
<td>33.6</td>
</tr>
<tr>
<td>2</td>
<td>360</td>
<td>8.1</td>
</tr>
<tr>
<td>More than 2~</td>
<td>108</td>
<td>2.4</td>
</tr>
</tbody>
</table>

*834 respondents did not answer did not give a location and are therefore excluded from this analysis. ~ Some clubs asked explicitly for the number of cars owned. Others asked about '5 or more' etc. All those answering more than 2 have been grouped together in this table.

Table 10-4 summarises the change in number of cars owned by household members using car clubs inside and outside London. The findings show that 31.6% of car club members based in London have reduced the number of vehicles owned by their household since joining a car club, compared to 36.7% of non-London car club members. In general, this may partly be because non-London members are more likely to start by owning a car.
Table 10-4: Change in number of cars owned by household, inside and out of London

<table>
<thead>
<tr>
<th>Change in number of cars owned†</th>
<th>London</th>
<th></th>
<th>Non-London</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Frequency*</td>
<td>Percentage (%)</td>
<td>Frequency#</td>
<td>Percentage (%)</td>
</tr>
<tr>
<td>-5</td>
<td>7</td>
<td>0.2</td>
<td>1</td>
<td>0.1</td>
</tr>
<tr>
<td>-4</td>
<td>8</td>
<td>0.2</td>
<td>1</td>
<td>0.1</td>
</tr>
<tr>
<td>-3</td>
<td>18</td>
<td>0.4</td>
<td>3</td>
<td>0.2</td>
</tr>
<tr>
<td>-2</td>
<td>122</td>
<td>2.8</td>
<td>54</td>
<td>2.8</td>
</tr>
<tr>
<td>-1</td>
<td>1242</td>
<td>28.1</td>
<td>649</td>
<td>33.6</td>
</tr>
<tr>
<td>0</td>
<td>2859</td>
<td>64.7</td>
<td>1123</td>
<td>58.2</td>
</tr>
<tr>
<td>1</td>
<td>156</td>
<td>3.5</td>
<td>95</td>
<td>4.9</td>
</tr>
<tr>
<td>2</td>
<td>8</td>
<td>0.2</td>
<td>3</td>
<td>0.2</td>
</tr>
<tr>
<td>3</td>
<td>0</td>
<td>0.0</td>
<td>1</td>
<td>0.1</td>
</tr>
<tr>
<td>4</td>
<td>0</td>
<td>0.0</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Total responses</td>
<td>4420</td>
<td></td>
<td>1930</td>
<td></td>
</tr>
</tbody>
</table>

*834 respondents did not answer did not give a location and are therefore excluded from this analysis.

†Where respondents had answered ‘5 or more’ to their car ownership levels either before or after joining a car club, this was recoded as invalid and has not been included in the above data. This affected 1 London member.

10.5 Effects of car club membership on previous car purchasing decisions

Respondents were asked whether they would have bought a private car had they not become a member of a car club. The results are shown in Table 10-5. As with last year’s results, the differences are small, indicating that location does not appear to have a big effect on whether members thought that they would otherwise have bought a car or not.

Table 10-5: Intention to purchase a new car*

<table>
<thead>
<tr>
<th>Member Type</th>
<th>If you had not joined a car club would you have bought a private car? (%)</th>
<th>Number of respondents ~</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>London members</td>
<td>30.8</td>
<td>40.7</td>
</tr>
<tr>
<td>Non-London members</td>
<td>29.6</td>
<td>43.2</td>
</tr>
</tbody>
</table>

*834 respondents did not answer did not give a location and are therefore excluded from this analysis.

~122 London members and 23 non-London members did not reply to this question.

10.6 Effects of car club membership on future car purchasing decisions

Respondents were asked whether joining a car club has made it more or less likely that they will buy their own car (or another car) in the next few years. As outlined in Table 10-6, 8.3% of London members and 7.4% of non-London members reported that they are more likely to purchase a car (or another car) in the next few years, while 60.9% of London members and 62.9% of non-London members reported that they were less likely to purchase a car.
Table 10-6: Intention to purchase a new car in the future*

<table>
<thead>
<tr>
<th>Member Type</th>
<th>Do you think that joining a car club has made it more or less likely that you will buy your own car (or another car) in the next few years? (%)</th>
<th>Number of respondents~</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>More Likely</td>
<td>Less Likely</td>
</tr>
<tr>
<td>London members</td>
<td>8.3</td>
<td>60.9</td>
</tr>
<tr>
<td>Non London members</td>
<td>7.4</td>
<td>62.9</td>
</tr>
</tbody>
</table>

*834 respondents did not answer did not give a location and are therefore excluded from this analysis.
~109 London members and 16 non-London members did not reply to this question.

10.7 Frequency of use of non-car modes

Table 10-7 compares the relative frequency with which London members and non-London members report using different modes of transport (other than the car). The full data set is given in Appendix E. In general, London members make more frequent trips by public transport or taxi, whilst non-London members make more frequent long walking trips or journeys by bicycle. For example, 70% London members report using a bus once a week or more, compared to only 57% of non-London members, however, 36% of non-London members report using a bike at least once a week, compared to 30% of non-London members.

Table 10-7: Comparing frequency of use of different modes*

<table>
<thead>
<tr>
<th></th>
<th>At least once per week</th>
<th>Less than that but at least once per month</th>
<th>Less than that</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ordinary bus</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>London members</td>
<td>70.3</td>
<td>16.3</td>
<td>13.5</td>
</tr>
<tr>
<td>Non-London members</td>
<td>56.7</td>
<td>22.8</td>
<td>20.5</td>
</tr>
<tr>
<td><strong>Train</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>London members</td>
<td>41.7</td>
<td>31.1</td>
<td>27.2</td>
</tr>
<tr>
<td>Non-London members</td>
<td>37.6</td>
<td>35.8</td>
<td>26.6</td>
</tr>
<tr>
<td><strong>Underground, metro or other tram</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>London members</td>
<td>74.9</td>
<td>14.2</td>
<td>10.9</td>
</tr>
<tr>
<td>Non-London members</td>
<td>41.7</td>
<td>19.3</td>
<td>39.0</td>
</tr>
<tr>
<td><strong>Taxi or minicab</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>London members</td>
<td>24.7</td>
<td>36.4</td>
<td>38.9</td>
</tr>
<tr>
<td>Non-London members</td>
<td>20.2</td>
<td>39.7</td>
<td>40.1</td>
</tr>
<tr>
<td><strong>Bicycle</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>London members</td>
<td>30.3</td>
<td>10.7</td>
<td>59.0</td>
</tr>
<tr>
<td>Non-London members</td>
<td>35.8</td>
<td>11.0</td>
<td>53.1</td>
</tr>
<tr>
<td><strong>Walking for 20 mins+</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>London members</td>
<td>76.8</td>
<td>11.4</td>
<td>11.8</td>
</tr>
<tr>
<td>Non-London members</td>
<td>81.9</td>
<td>9.3</td>
<td>8.8</td>
</tr>
</tbody>
</table>

*834 respondents did not answer did not give a location and are therefore excluded from this analysis.
10.8 Frequency of car use

This section compares the frequency of car use as a driver and as a passenger by London and non-London members. Results are given in Table 10-8 and Table 10-9. This indicates that, in general, non-London members make more frequent use of cars than London members. However, the differences between the two groups are still relatively small, and, both groups predominantly report infrequent car use (as either a driver or a passenger).

Table 10-8: Frequency of travel as car driver (private car or car club vehicle)*

<table>
<thead>
<tr>
<th>Frequency of Trip</th>
<th>London members</th>
<th>Non-London members</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fr</td>
<td>%</td>
</tr>
<tr>
<td>3+ times a week</td>
<td>411</td>
<td>9.5</td>
</tr>
<tr>
<td>1-2 times a week</td>
<td>577</td>
<td>13.3</td>
</tr>
<tr>
<td>Less than that but at least 1 per month</td>
<td>1715</td>
<td>39.5</td>
</tr>
<tr>
<td>Less than that but at least 1 per year</td>
<td>952</td>
<td>21.9</td>
</tr>
<tr>
<td>No trips made</td>
<td>689</td>
<td>15.9</td>
</tr>
<tr>
<td>Total valid responses</td>
<td>4344</td>
<td></td>
</tr>
<tr>
<td>No responses</td>
<td>136</td>
<td></td>
</tr>
</tbody>
</table>

*834 respondents did not answer did not give a location and are therefore excluded from this analysis.

Table 10-9: Frequency of travel as a car passenger (private car or car club vehicle)*

<table>
<thead>
<tr>
<th>Frequency of Trip</th>
<th>London members</th>
<th>Non-London members</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fr</td>
<td>%</td>
</tr>
<tr>
<td>3+ times a week</td>
<td>269</td>
<td>6.2</td>
</tr>
<tr>
<td>1-2 times a week</td>
<td>522</td>
<td>12.1</td>
</tr>
<tr>
<td>Less than that but at least 1 per month</td>
<td>1566</td>
<td>36.3</td>
</tr>
<tr>
<td>Less than that but at least 1 per year</td>
<td>962</td>
<td>22.3</td>
</tr>
<tr>
<td>No trips made</td>
<td>991</td>
<td>23.0</td>
</tr>
<tr>
<td>Total valid responses</td>
<td>4310</td>
<td></td>
</tr>
<tr>
<td>No responses</td>
<td>170</td>
<td></td>
</tr>
</tbody>
</table>

*834 respondents did not answer did not give a location and are therefore excluded from this analysis.

10.9 Annual mileages

This section summarises the data on annual mileages travelled by London and non-London car clubs members. Figure 10-1 illustrates use of car club vehicles; Figure 10-2 illustrates use of privately owned vehicles; and Figure 10-3 indicates the combined data, to give an illustration of total household mileage. In all cases, the distributions are similar, though there is a greater proportion of non-London households who do more than 5000 miles a year (18.0% versus 13.6%). However, for both sets of members, more than three-quarters of members are doing less than 3000 miles a year, even when both car club and private mileage are included.
Figure 10-1: Annual car club mileage

Figure 10-2: Annual private vehicle mileage

17 This graph shows only mileages for those members who own one or more private vehicles. 80% of London members and 75% of non-London members did not own a car, implying that their private car mileage was zero. In addition, 1.7% of London and 1.2% of non-London members owned cars but reported that they did zero mileage in the previous year. 60 London and 12 non-London members reported that they ‘didn’t know’ their private vehicle mileage and 205 London and 46 non-London members provided no response.
Table 10-9 Summary of household mileages done by London versus non-London members

<table>
<thead>
<tr>
<th>Annual Total Household Mileage</th>
<th>London*</th>
<th>Non London~</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent (%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>500 or less</td>
<td>40.0</td>
<td>39.7</td>
</tr>
<tr>
<td>501 – 1000</td>
<td>21.4</td>
<td>19.9</td>
</tr>
<tr>
<td>1001 - 3000</td>
<td>18.8</td>
<td>16.0</td>
</tr>
<tr>
<td>3001 – 5000</td>
<td>6.2</td>
<td>5.5</td>
</tr>
<tr>
<td>5001 - 10,000</td>
<td>7.1</td>
<td>9.9</td>
</tr>
<tr>
<td>10,001+</td>
<td>6.5</td>
<td>9.1</td>
</tr>
<tr>
<td>Total Responses</td>
<td>3332</td>
<td>1610</td>
</tr>
</tbody>
</table>

* 215 London members ‘didn’t know’ their annual household mileage, while 560 did not respond to the question.

~ 43 non-London ‘didn’t know’ their annual household mileage, while did not respond to the question.

10.10 Summary

Comparing car club members outside London with those based in London suggests that non-London members:

- Include a higher proportion of women, and older people.
- Have, on average, been members for longer (though this difference is reducing over time, as car clubs become more established in London).
- Are more likely to own a car, but are also more likely to have got rid of a vehicle, and are also slightly more likely to be deterred from buying a car in the future.
- Tend to be less frequent users of public transport and taxis, but this is at least partially offset by more frequent walking and cycling.
- On average, are slightly more frequent users of cars (though differences compared with London members are small)
- On average, include a higher proportion of households who drive more than 5000 miles a year, although more than three-quarters of both London and non-London members report that, in the last year, their total household car mileage (including use of car club vehicles) was 3000 miles or less.
Appendix A    Annual Survey

It would be great if you could take a few minutes to answer the following questions. In return, each member completing a survey will be entered into our Prize Draw, with the winner receiving 10 hours FREE DRIVING. This information will help the national charity Carplus and Transport for London to gain a better understanding of how car clubs influence travel patterns, and may help in gaining support for putting more cars on the street in the future. Many thanks.

What is your car club membership number? [Note to operators: this question is not needed if you can collect this information automatically]

1. In which location have you joined the car club? (if you use more than one location, please choose the one where you use the vehicles most frequently) (Offer drop down list. List London locations as ‘London – Croydon’, ‘London – Camden’ etc.)

2. Which year did you join the car club? If in 2010, also in which month? [Note to operators. The “month” part of the question is so we can exclude people who joined in the last 6 months. If you can exclude these people from the members survey automatically, then this part of the question is not needed]

3. What is your overall satisfaction with the current service? (Very good / good / average / poor / very poor).

4. How many cars did your household own before joining the car club? (please include lease cars or company cars where appropriate) (If giving answer options, please use ‘0’,‘1’,‘2’,‘3’,‘4’,‘5 or more’)

5. How many cars does your household own now? (please include lease cars or company cars where appropriate) If giving answer options, please use ‘0’,‘1’,‘2’,‘3’,‘4’,‘5 or more’)

6. If you hadn’t joined the car club, would you have bought a private car? (Yes/No/Don’t know)

7. Do you think that joining the car club has made it more or less likely that you will buy your own car (or another car) in the next few years?” (more likely, less likely, no effect, don’t know)

8. For your car club use, and any cars that your household currently owns, what was the approximate mileage travelled in the last year?”
   Household use of car club vehicles: ....miles
   Household car 1: .... miles;
   Household car 2:.... miles;
   Other household cars:....miles.
   (Give options: Zero; 1-500; 501-1000; 1001-2000; 2001-3000; 3001-4000; 4001-5000; 5001-6000; 6001-7000; 7001-8000; 8001-9000; 9001-10,000; 10,001-15,000; 15,001-20,000; 20,001+; Don’t know.)

9. Typically, how often do you make a trip by each of these types of transport? (please count a return journey as 2 trips)
<table>
<thead>
<tr>
<th>Activity</th>
<th>3 + times per week</th>
<th>1-2 times per week</th>
<th>Less than that but at least 1 per month</th>
<th>Less than that but at least 1 per year</th>
<th>No trips made</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ordinary bus (i.e. not express buses or coaches)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Train</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Underground, metro or other tram</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car driver (either private or car club vehicle)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car passenger (either private or car club vehicle)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taxi or minicab</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bicycle</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Walking for 20 minutes or more without stopping</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10. Did you make any trips as a car driver in the last MONTH? (Yes/No/Don’t know)

11. If yes, in the last WEEK, please give details about all the trips you have made as a CAR DRIVER. Please include both private car and car club trips. (Please record a return journey as 2 trips. Please put zeros in the boxes if you did not make any car driver trips of this length).

  e.g. if you went to visit friends at the weekend who live 60 miles away, please put '2' for this activity into the 50 miles or over box, or if your work is 7 miles away, and you drive there and back 5 days a week, please include '10' trips for this activity in the '5 to under 10' miles category.

<table>
<thead>
<tr>
<th>Type in the number of trips made</th>
</tr>
</thead>
<tbody>
<tr>
<td>50 miles and over</td>
</tr>
<tr>
<td>25 to under 50 miles</td>
</tr>
<tr>
<td>10 to under 25 miles</td>
</tr>
<tr>
<td>5 to under 10 miles</td>
</tr>
<tr>
<td>Under 5 miles</td>
</tr>
</tbody>
</table>
Appendix B  Joiners Survey

It would be great if you could take a few minutes to answer the following questions. **In return, we would like to offer you an hours free driving.** This information will help national charity Carplus and Transport for London to gain a better understanding of how car clubs influence travel patterns, and may help in gaining support for putting more cars on the street in future. Many thanks.

What is your car club membership number? [Note to operators: this question is not needed if you can collect this information automatically]

1. Age (give drop down list: 24 or less; 25-29; 30-34; 35-39; 40-44; 45-49; 50-54; 55-59; 60+. NB: Do not amalgamate categories or it will be hard to compare data collected from other sources).

2. Gender: Male/Female

3. In which location have you joined the car club (if you use more than one location choose the most frequent)? (Offer drop down list. List London locations as ‘London – Croydon’, ‘London – Camden’ etc.)

4. How many cars did your household own before joining the car club? (please include lease cars or company cars where appropriate)
   (If giving answer options, please use ‘0’, ‘1’, ‘2’, ‘3’, ‘4’, ‘5 or more’)

5. How many cars does your household own now? (please include lease cars or company cars where appropriate)
   (If giving answer options, please use ‘0’, ‘1’, ‘2’, ‘3’, ‘4’, ‘5 or more’)

6. If you hadn’t joined the car club, would you have bought a private car? (Yes/No/Don’t know)

7. Do you think that joining the car club has made it more or less likely that you will buy your own car (or another car) in the next few years?”
   (more likely, less likely, no effect, don’t know)

8. For any cars that your household owned before joining the car club, what was the approximate mileage travelled in the last year?”
   Household car 1: ... miles;
   Household car 2:... miles;
   Other household cars:...miles.
   (Give options: Zero; 1-500; 501-1000; 1001-2000; 2001-3000; 3001-4000; 4001-5000; 5001-6000; 6001-7000; 7001-8000; 8001-9000; 9001-10,000; 10,001-15,000; 15,001-20,000; 20,001+; Don’t know.)

9. In the MONTH before joining the car club, did you make any trips as a car driver? (Yes/No/Don’t know)

10. Before you joined the car club, typically, how often did you make a trip by each of these types of transport
   (Please record a return journey as 2 trips)
<table>
<thead>
<tr>
<th>Mode</th>
<th>3+ times per week</th>
<th>1-2 times per week</th>
<th>Less than that but at least 1 per month</th>
<th>Less than that but at least 1 per year</th>
<th>No trips made</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ordinary bus (i.e. not express buses or coaches)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Train</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Underground, metro or other tram</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car driver</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car passenger</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taxi or minicab</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bicycle</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Walking for 20 minutes or more without stopping</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix C  Operators Survey

Name of operator:

1. Total number of members as of end Feb 2011:

2. Total number of members who hired a car in the previous 12 months, as of end Feb 2011:

3. Number of members who belong to the car club at end Feb 2011 in
   a. London
   b. England (outside London)
   c. Scotland
   d. Wales

4. Gender split of all members (as at end Feb 2011):

<table>
<thead>
<tr>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
</tr>
<tr>
<td>Female</td>
</tr>
</tbody>
</table>

5. Age split of all members (as at end Feb 2011):

<table>
<thead>
<tr>
<th>Number of members</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;21</td>
</tr>
<tr>
<td>21-24</td>
</tr>
<tr>
<td>25-29</td>
</tr>
<tr>
<td>30-34</td>
</tr>
<tr>
<td>35-39</td>
</tr>
<tr>
<td>40-44</td>
</tr>
<tr>
<td>45-49</td>
</tr>
<tr>
<td>50-54</td>
</tr>
<tr>
<td>55-59</td>
</tr>
<tr>
<td>60+</td>
</tr>
</tbody>
</table>

6. Mean average distance per hire (in miles):

7. Length of average hire period (in hours):

8. Average number of hires per member per year – for those who have rented a car in the last 12 months (to end Feb 2011):
9. Distribution of the number of hires per member per year:

<table>
<thead>
<tr>
<th>Number of hires in the last 12 months (to end Feb 2011)</th>
<th>Number of members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td></td>
</tr>
<tr>
<td>1-5</td>
<td></td>
</tr>
<tr>
<td>6-10</td>
<td></td>
</tr>
<tr>
<td>11-15</td>
<td></td>
</tr>
<tr>
<td>16-20</td>
<td></td>
</tr>
<tr>
<td>21-25</td>
<td></td>
</tr>
<tr>
<td>26-50</td>
<td></td>
</tr>
<tr>
<td>51-100</td>
<td></td>
</tr>
<tr>
<td>100+</td>
<td></td>
</tr>
</tbody>
</table>

10. Distribution of the miles travelled per hire:

<table>
<thead>
<tr>
<th>Hire distance</th>
<th>Number of hires in the last 12 months (to end Feb 2011)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-5</td>
<td></td>
</tr>
<tr>
<td>6-10</td>
<td></td>
</tr>
<tr>
<td>11-15</td>
<td></td>
</tr>
<tr>
<td>16-20</td>
<td></td>
</tr>
<tr>
<td>21-25</td>
<td></td>
</tr>
<tr>
<td>26-50</td>
<td></td>
</tr>
<tr>
<td>51-100</td>
<td></td>
</tr>
<tr>
<td>100+</td>
<td></td>
</tr>
</tbody>
</table>

11. What are the average emissions, per car in gCO₂/km, from your car club cars, as at end Feb 2011?

12. How many car club cars do you have in each emissions range, in gCO₂/km, as at end Feb 2011? If you have vans, please report separately on these.

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<td>Witham</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Woking</td>
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<td></td>
</tr>
<tr>
<td>Wokingham</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Wooburn</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Worcester</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Worsinghall</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Worthing</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Wraysbury</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Wrexham</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Yeovil</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>York</td>
<td>38</td>
<td></td>
</tr>
<tr>
<td><strong>No Response</strong></td>
<td>834</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>7266</td>
<td></td>
</tr>
</tbody>
</table>
Appendix E  Frequency data

Table D1: Data for all respondents

| Frequency of Trip | Mode                                      | Joiners | Members | Joiners | Members | Joiners | Members | Joiners | Members | Joiners | Members | Joiners | Members | Joiners | Members | Joiners | Members | Joiners | Members | Joiners | Members |
|-------------------|-------------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
|                   | Ordinary bus (i.e. not express buses or coaches) |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 3+ times a week   | Fr                                        | 475     | 3334    | 204     | 1920    | 396     | 3490    | 80      | 543     | 235     | 1634    | 643     | 3830    |         |         |         |         |         |         |
|                   | %                                         | 41.3    | 46.4    | 17.7    | 27.1    | 34.4    | 48.5    | 7.0     | 7.6     | 20.5    | 23.1    | 55.9    | 53.3    |         |         |         |         |         |         |
| 1-2 times a week  | Fr                                        | 237     | 1419    | 155     | 973     | 170     | 1229    | 165     | 1133    | 93      | 608     | 274     | 1764    |         |         |         |         |         |         |
|                   | %                                         | 20.6    | 19.8    | 13.5    | 13.7    | 14.7    | 17.1    | 14.4    | 15.9    | 8.1     | 8.6     | 23.8    | 24.5    |         |         |         |         |         |         |
| Less than that but at least 1 per month | Fr | 224 | 1282 | 408 | 2268 | 213 | 1108 | 419 | 2639 | 121 | 776 | 147 | 767 |         |         |         |         |         |         |         |
|                   | %                                         | 19.5    | 17.9    | 35.5    | 32.0    | 18.5    | 15.4    | 36.5    | 37.1    | 10.6    | 11.0    | 12.8    | 10.7    |         |         |         |         |         |         |
| Less than that but at least 1 per year  | Fr                                        | 98      | 393     | 248     | 1058    | 137     | 575     | 276     | 1636    | 102     | 637     | 34      | 156     |         |         |         |         |         |         |
|                   | %                                         | 8.5     | 5.8     | 21.6    | 14.9    | 11.9    | 8.0     | 24.0    | 23.0    | 8.9     | 9.0     | 3.0     | 2.2     |         |         |         |         |         |         |
| No trips made     | Fr                                        | 117     | 752     | 135     | 879     | 237     | 791     | 209     | 1171    | 595     | 3434    | 53      | 672     |         |         |         |         |         |         |
|                   | %                                         | 10.2    | 10.5    | 11.7    | 12.4    | 20.6    | 11.0    | 18.2    | 16.4    | 51.9    | 48.4    | 4.6     | 9.4     |         |         |         |         |         |         |
| No response       |                                            | 33      | 86      | 34      | 168     | 31      | 73      | 35      | 144     | 38      | 177     | 33      | 77      |         |         |         |         |         |         |
| Total valid responses |                                    | 1151 | 1151 | 1150 | 7098 | 1153 | 7193 | 1149 | 7122 | 1146 | 7089 | 1151 | 7189 |         |         |         |         |         |         |
Table D2: Data for members, split by location

<table>
<thead>
<tr>
<th>Mode</th>
<th>London</th>
<th>Non-London</th>
<th>Total Valid Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Train (not express)</td>
<td>87</td>
<td>96</td>
<td>183</td>
</tr>
<tr>
<td>Underground</td>
<td>36</td>
<td>45</td>
<td>81</td>
</tr>
<tr>
<td>Bicycle</td>
<td>7</td>
<td>10</td>
<td>17</td>
</tr>
<tr>
<td>Taxi or minicab</td>
<td>5</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>Ordinary bus</td>
<td>5</td>
<td>7</td>
<td>12</td>
</tr>
<tr>
<td>Walking for 20 mins or more</td>
<td>3</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>Shopping without limits</td>
<td>4</td>
<td>3</td>
<td>7</td>
</tr>
</tbody>
</table>

*834 respondents did not answer did not give a location and are therefore excluded from this analysis.

<table>
<thead>
<tr>
<th>Frequency of Trip</th>
<th>London</th>
<th>Non-London</th>
<th>Total Valid Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2 times a week</td>
<td>22</td>
<td>21</td>
<td>43</td>
</tr>
<tr>
<td>3+ times a week</td>
<td>11</td>
<td>9</td>
<td>20</td>
</tr>
<tr>
<td>Less than that but at least 1 per month</td>
<td>182</td>
<td>173</td>
<td>355</td>
</tr>
<tr>
<td>1-2 times a year</td>
<td>31</td>
<td>27</td>
<td>58</td>
</tr>
<tr>
<td>No trips made</td>
<td>46</td>
<td>41</td>
<td>87</td>
</tr>
<tr>
<td>No response</td>
<td>51</td>
<td>40</td>
<td>91</td>
</tr>
</tbody>
</table>

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</thead>
<tbody>
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<tr>
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<tr>
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<td>7</td>
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<td>27</td>
<td>58</td>
</tr>
<tr>
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<td>46</td>
<td>41</td>
<td>87</td>
</tr>
<tr>
<td>No response</td>
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<td>40</td>
<td>91</td>
</tr>
</tbody>
</table>
Car clubs – a form of neighbourhood car rental – offer an alternative to private car ownership. This report analyses the results of the 2010/11 annual survey conducted by Carplus – an environmental charity promoting ‘a rethink in car use’. The survey results show that car clubs have a significant effect on household car ownership. From a sample of 8,450 respondents, after becoming a car club member, 32% reported that they had reduced the number of cars in their household; 30% reported that they would otherwise have bought a car; and 61% reported that their likelihood of buying a car in the next few years had reduced. Compared to the average license holder, car club members make relatively frequent trips by public transport, cycling and walking. They also travel relatively low mileages – 85% of respondents reported that their household drove 5000 miles a year or less (including travel in both car club vehicles and private cars). On average, car club vehicles are typically 26% more efficient than the average UK car.

Other titles from this subject area

INS005 How can we produce safer new drivers? S Helman, G B Grayson and A M Parkes. 2010.