



# Eagle Quarter proposals: shared transport appraisal

CoMoUK consultants: AC, RT

[info@como.org.uk](mailto:info@como.org.uk)

## 1. Executive summary

The proposed Eagle Quarter development is being built in an area of good potential for shared transport. Reduced parking levels and the provision of sustainable alternatives at the Eagle Quarter will help the development to support Newbury and West Berkshire's sustainable transport, spatial planning and transport decarbonisation ambitions. Implemented in the way we recommend in this report, the plans have the potential to be an exemplar for shared transport provision at new developments.

## 2. Background

This report has been prepared by CoMoUK on behalf of developer Lochailort Newbury Ltd in support of a Full Planning Application (Application No: 23/02094/FULMAJ) for the Eagle Quarter, a proposed redevelopment of the Kennet Centre in Newbury, West Berkshire.

CoMoUK is the national charity for shared transport, the UK's car club and bike sharing accreditation body and has run annual surveys of shared transport users for over a decade.

In this report we cover:

- Shared transport and its benefits, including at new developments (this section)
- The existing potential for shared transport – car clubs and bike sharing – at the proposed Eagle Quarter development site (section 3)
- An appraisal of the development plans with reference to shared transport (section 4)
- Recommendations of what shared transport should look like at the development (section 5)
- Concluding remarks (section 6)

### 2.1. Shared transport overview

Shared transport covers a range of sustainable transport modes that complement public transport and active travel. In this report we are focusing on two types of shared transport with reference to the Eagle Quarter development: car clubs and bike sharing.

Car clubs provide app-based access to a car, rented by the hour, typically from a commercial operator. Vehicles are usually rented from a particular parking bay and returned to this space at the end of the rental. They provide a low cost alternative to ownership for those who only need a car occasionally. Car clubs have experienced substantial growth since the pandemic, with around 780,000 members of car club schemes across the UK, more than double the 2019 figure.<sup>1</sup>

Bike sharing, also known as bike hire, offers the benefits of access to bikes without needing to own them. Schemes can be part of a wider network, like London's Santander Cycles or Watford's Beryl bikes, or a standalone pool of bikes or 'bike library' available for people to borrow. Like car clubs, bike

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<sup>1</sup> <https://www.como.org.uk/documents/car-club-annual-report-uk-2022> p.7

sharing schemes have increased considerably since the pandemic; the number of users and fleet size in the UK has more than doubled, to around 4 million members and 46,000 bikes respectively.<sup>2</sup>

## 2.2. Policy context and benefits

Transport is the UK's largest sector of carbon emissions, with car use causing the majority of these emissions.<sup>3</sup> Simply converting the existing car stocks to electric vehicles (EVs) is highly unlikely to be enough for the UK to achieve net zero carbon emissions from transport.<sup>4</sup> EVs are also more expensive to purchase or lease than internal combustion engine (petrol/diesel) cars.<sup>5</sup> Car clubs therefore support an equitable transition for those who are able to reduce car usage, providing people with the benefit of car access when they need it but without the carbon emissions and costs of ownership. As well as driving less, car club users are more likely than the national average to walk, cycle or take public transport, boosting demand for sustainable modes of travel.<sup>6</sup>

The UK Government has recognised the role car clubs will play in tackling transport emissions, with car manufacturers gaining additional credits under the zero emission vehicle (ZEV) mandate, which requires car manufacturers to progressively increase the proportion of EVs sold to 80% by 2030 and 100% by 2035.<sup>7</sup> The Committee on Climate Change, the statutory body monitoring the UK's progress on decarbonisation targets, uses car club and other shared transport uptake figures as indicators to assess the UK's progress towards providing low carbon transport alternatives.<sup>8</sup>

Bike sharing also furthers transport decarbonisation, replacing around 245 million car miles annually, equivalent to over 100,000 tonnes of CO<sub>2</sub>.<sup>9</sup> It also works well as a 'first/last mile' connector, with around one third of bike sharing users combining journeys with other modes of transport.<sup>10</sup> Many people are initially attracted to bike sharing because it reduces concerns around storage, theft or maintenance. Around two thirds of bike sharing users cycle more frequently after joining a bike sharing scheme, demonstrating bike sharing's role in unlocking demand for active travel.<sup>11</sup>

In addition to supporting net zero efforts, shared transport also helps spatial planning and placemaking goals. One car club vehicle in the UK replaces the need for 9-22 private cars.<sup>12</sup> Cars are only driven 4% of the time in England and parked the rest of the time (73% at home and 23% elsewhere e.g. at work).<sup>13</sup> When car clubs are located near other modes of sustainable transport, including bike sharing and public transport, this unlocks the potential for reallocating road or parking

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<sup>2</sup> <https://www.como.org.uk/shared-bikes/overview-and-benefits> Accessed April 2024

<sup>3</sup> <https://www.gov.uk/government/statistics/transport-and-environment-statistics-2023/transport-and-environment-statistics-2023>

<sup>4</sup> <https://www.ox.ac.uk/news/2021-06-14-obsessing-over-electric-cars-impeding-race-net-zero-more-active-travel-essential>

<sup>5</sup> <https://www.uswitch.com/electric-car/ev-charging/what-is-the-lifetime-cost-of-an-electric-vehicle/>

<sup>6</sup> <https://www.como.org.uk/documents/car-club-annual-report-uk-2022> p.19

<sup>7</sup> <https://www.gov.uk/government/consultations/a-zero-emission-vehicle-zev-mandate-and-co2-emissions-regulation-for-new-cars-and-vans-in-the-uk>

<sup>8</sup> <https://www.theccc.org.uk/publication/ccc-monitoring-framework/?chapter=2-surface-transport#indicators>

<sup>9</sup> <https://www.como.org.uk/documents/bike-share-annual-report-uk-2023> p.16

<sup>10</sup> <https://www.como.org.uk/documents/bike-share-annual-report-uk-2023> p.19

<sup>11</sup> <https://www.como.org.uk/documents/bike-share-annual-report-uk-2023> p.9

<sup>12</sup> <https://www.como.org.uk/documents/car-club-annual-report-uk-2022> p.21

<sup>13</sup> <https://www.racfoundation.org/media-centre/cars-parked-23-hours-a-day>

space to other purposes. Alternative uses of land include enhanced public realm, green spaces, bike or bus lanes, retail and housing.

Car clubs also directly work towards air pollution reduction targets. 14% of the UK's car club fleet is electric, compared to just 2% of the country's overall fleet, and 100% of the UK's car clubs fleet meet standards for low emissions zones.<sup>14</sup>

### 2.3. New developments and shared transport

New developments have several important roles to play in helping to promote car clubs. Firstly, the design of a development, particularly the level of residents' parking spaces, can determine whether or not car clubs are likely to succeed. Secondly, developer contributions can be leveraged to support car clubs. When deployed correctly, contributions can encourage not just the residents or businesses at a development to use the car club, but also benefit members of the wider community.

## 3. Eagle Quarter site: existing shared transport potential

The existing site is a location with good potential for shared transport. We have considered a range of factors to make this assessment:

- **Population density:** 4,000 people per square kilometre and above is typically considered a good population density for shared transport by operators, something the area will almost certainly achieve if the Eagle Quarter is built. According to the 2021 census, the population density for the 'output area' that covers most of the proposed Eagle Quarter site is 3,809 per square kilometre.<sup>15</sup> It is bordered immediately to the west by output areas with a population density of between 5,000-14,000.
- **Car ownership and commuting levels:** The census output area covering the site indicates that 47% of the population do not own a car.<sup>16</sup> This level of non-car ownership is significantly higher than the figure for West Berkshire, which is 12.1%, and closer to levels typically found in a borough on the edge of inner London, such as Lewisham, Greenwich or Wandsworth. Census data for the site indicates that around 60% of residents in employment commute via means other than car or van.<sup>17</sup> This is well above the 30% threshold that is usually considered by car club operators to be a good minimum level of non-car commuting.
- **Public transport:** The site is located just over five minutes' walk from Newbury train station, which has regular train services to Reading and London. The proposed new pedestrian walkways created by the Eagle Quarter and the adjacent Weavers Yard development will make this journey even shorter. It is also a short walk to Newbury Wharf Bus station. Having access to different

<sup>14</sup> <https://www.como.org.uk/documents/car-club-annual-report-uk-2022> p.22

<sup>15</sup> <https://www.ons.gov.uk/census/maps/choropleth/population/population-density/population-density/persons-per-square-kilometre?oa=E00177246>

<sup>16</sup> <https://www.ons.gov.uk/census/maps/choropleth/housing/number-of-cars-or-vans/number-of-cars-5a/no-cars-or-vans-in-household?oa=E00177246>

<sup>17</sup> <https://www.ons.gov.uk/census/maps/choropleth/work/method-of-travel-to-workplace/transport-to-workplace-12a/driving-a-car-or-van?msoa=E02003385>

types of public transport means that people are less likely to need to own a car at any new developments.

- **Distance to amenities:** The transport assessment for the Eagle Quarter planning application demonstrates that there is a wide range of health, education, employment, retail and leisure sites within easy access, without needing a private car.<sup>18</sup>
- **Parking restrictions on the public highway:** The presence of controlled parking zones covering the area around the site disincentives private car usage and encourages use of more sustainable modes. Controlled or residents' parking zones are considered by car club operators to be a supportive indicator for car clubs take-up.
- **Existing shared transport provision:** car clubs have been present in Newbury for some years, indicating car sharing demand. Enterprise is the council-appointed car club operator and currently has five vehicles in the town, four of which are within ten minutes' walk from the site.<sup>19</sup>

## 4. Eagle Quarter: shared transport appraisal

### 4.1. Car clubs

The Eagle Quarter is a proposed development of 427 'Build to rent' homes, over half of which will be either studio or one-bedroom flats. As outlined in the sections above, the conditions are already favourable in the area for shared transport and the development would improve the situation. The Eagle Quarter is likely to attract and be marketed at young professionals, the demographic most likely to use car clubs.<sup>20</sup> As the development is well-served by nearby amenities and public transport, there is even less need to own a car in this location. This accords with the phrase "I don't need a car very often" being the most-selected reason for joining a car club in CoMoUK's latest annual survey.<sup>21</sup>

We strongly support the developer's proposal to provide the equivalent of 0.5 parking spaces per unit.<sup>22</sup> A crucial factor for the success of shared transport, car clubs in particular, at new developments is the number of parking spaces provided per unit. A high number of private parking spaces induces people to purchase, and therefore use, private cars, which undermines the viability of car clubs and other sustainable transport modes in the area.<sup>23</sup>

The proposed parking levels support, and are in turn supported by, the developer's proposals to work with Enterprise to provide three new car club vehicles at the site, as outlined in the parking management plan.<sup>24</sup> Being a rental-only development, residents are unlikely to have the same car

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<sup>18</sup> Eagle Quarter II, Newbury, Transport Assessment Addendum, December 2023, Waterman Infrastructure & Environment Ltd, pp.18-20

<sup>19</sup> \*Calculated by using [Kennet shopping centre](#) as the start point and requesting walking directions on Google Maps. Locations and details of the car club vehicles taken from the map on Enterprise Car Club [website](#).

<sup>20</sup> <https://www.como.org.uk/documents/car-club-annual-report-uk-2022> p.8

<sup>21</sup> <https://www.como.org.uk/documents/car-club-annual-report-uk-2022> p.9

<sup>22</sup> Eagle Quarter II, Newbury, Car Parking Management Plan, December 2023, Waterman Infrastructure & Environment Ltd, pp.6-7

<sup>23</sup> <http://dx.doi.org/10.7488/era/3776> p.26

<sup>24</sup> Eagle Quarter II, Newbury, Car Parking Management Plan, December 2023, Waterman Infrastructure & Environment Ltd, p.7

ownership needs as owner-occupiers: the 2021 census indicates that in England, nearly 60% of private rented households do not own a car, vs less than 15% for owner-occupiers.<sup>25</sup> Three car club vehicles equates to between 27-66 private car spaces not needed at the development.<sup>26</sup> As this is an average figure, the potential number of users per vehicle can be higher, as the vast majority of car club members only use vehicles 1-10 times per year.<sup>27</sup> By working with the existing operator, the other four car club vehicles that are currently within 10 minutes' walk of the site will also be available to residents, catering to any additional demand for car access. Providing a car club van and bike sharing should also reduce the need for cars among residents, as discussed in the sections below.

At most new developments, CoMoUK recommends working with the established car club operator in the area, as most places in the UK can only support one operator. Working with the existing provider, and making vehicles available for hire by non-residents can create a 'virtuous circle' for car clubs growth for both residents of the new development and others. The best example in the UK of developer contributions being leveraged in this way is Aberdeen City Council, which has around twice the number of car club vehicles than a city of its size typically does.<sup>28</sup> For developments of over 50 units, Aberdeen City Council sets the following requirements from developers:

<b>Car club in area not at capacity</b>	<b>No car club or car at capacity</b>
Developer contributes £400 for every unit with parking shortfall plus 2 memberships and driving credit.	If the shortfall of spaces is more than 17 then the developer must fund up to 3 additional vehicles. Funding is provided for the car club for 3 years including EV infrastructure.

Bath and North East Somerset Council has also encouraged the growth of car clubs by mandating developers contribute towards car clubs in new developments:<sup>29</sup>

<b>Zone</b>	<b>Residents' parking spaces</b>	<b>Car clubs</b>
Zone A: Bath City Centre	0.5 spaces per dwelling (no visitor spaces required where residents' parking is unallocated)	5+ units: 2 years membership to the nearest car club bay provider (1 per unit) upon occupation. Between 51- 300 units: 1 car club bay per 50 units. 1 car club bay per each subsequent 100 units.

<sup>25</sup> <https://www.ons.gov.uk/datasets/RM131/editions/2021/versions/1/filter-outputs/b4ee0ef5-8eb1-48c8-b08c-471cef422c9c#summary>

<sup>26</sup> Based on one car club vehicle removing the need for between 9-22 cars, referenced above (<sup>12</sup>)

<sup>27</sup> <https://www.como.org.uk/documents/car-club-annual-report-uk-2022> p.11

<sup>28</sup> <https://www.como.org.uk/documents/new-developments-guidance> p.12

<sup>29</sup> <https://beta.bathnes.gov.uk/sites/default/files/2023-05/BNES%20Transport%20and%20Development%20SPD%202023.pdf> pp.66-67

Given the favourable conditions for car clubs that already exist at the site, the nature of the Eagle Quarter development is only likely to improve conditions for car clubs in the area. In our recommendations section, below, we suggest how the developer can best deploy its resources to support car clubs for the benefit of residents of the new development as well as the wider population.

## 4.2. Bike sharing

The developer has indicated that in addition to providing spaces for private bike parking, it would like to provide a pool of bikes for residents to share. We support this proposal as bike sharing can be a good alternative for people who don't want the hassle of ownership but would benefit from occasional access to bikes. Bike sharing should be accompanied by effective marketing to residents to make them aware of the scheme and how to access it.

The bike sharing provision at Eagle Quarter should support the parking levels proposed by the developer. Around one quarter of respondents to CoMoUK's survey stated that their last bike sharing journey would have been taken by car.<sup>30</sup> Bike sharing also acts as a catalyst for more regular active travel, with half of respondents to CoMoUK's latest bike sharing survey saying that joining a scheme enabled them to cycle for the first time in at least a year, or in some cases for the first time ever.<sup>31</sup>

West Berkshire does not currently have a bike sharing scheme. Any shared bike provision at the development would therefore be a standalone scheme, rather than part of a wider network. We have provided some case studies below:

Settlement	Population	Operator	Factors for success
Houghton Regis and Bidwell	18,820	App bike	S106 funded medium density, new development which will be expanding as the new development grows over the next few years. Cycle ways are being improved which will provide better and more useful links to destinations. Shops and amenities in walking distance.
London, various locations	Various	Brompton Bike Hire	Developer Hadley Property Group is working with Brompton Bike Hire to install folding bike lockers at several of the developer's sites around outer London. In some cases these are available for anyone to hire, or specific groups, such as residents. <sup>32</sup>

We provide recommendations for the developer relating to bike sharing in the following section.

<sup>30</sup> <https://www.como.org.uk/documents/bike-share-annual-report-uk-2023> p.16

<sup>31</sup> <https://www.como.org.uk/documents/bike-share-annual-report-uk-2023> p.8

<sup>32</sup> <https://hadleypropertygroup.com/impact/brompton-bike-hire>

## 5. Recommendations

### 5.1. Car clubs

In Newbury, we recommend the developer works with Enterprise Car Club, who are the car club operator appointed by West Berkshire council.

We support the proposal to add up to three new car club cars, which should be available to members of the public to increase viability of the scheme. We would recommend the developer engages as soon as possible with the council and Enterprise to identify the best possible offer for both residents and businesses at the new development and the wider community. Key provisions include:

- **Signing up new members** – it is important that the developers include information on the car club in the marketing material and encourage, or even auto-enrol, new residents to join the car club before they have even moved in, along with providing information on how to use the scheme.
- **Incentive levels for new residents** – residents of new developments typically receive one or two free memberships of the car club, usually valid for several years, to embed car club use. In this case, we would recommend one free membership per studio flat and two free memberships for flats of other sizes. Driving credit and/or a reduced hourly tariff is also usually provided for residents. Because the development is for renters, not owner-occupiers, we would recommend that free annual memberships are offered to new residents for at least the first five years of occupation.
- **Analysis of existing car club vehicle usage** – before looking at what new provision needs to be funded, the developer should work with the operator and the planning/transport authority to understand what the current usage of the existing nearby car club vehicles is. This will help to work out what level of additional support will be needed from the developer and avoid any potential of over-saturating the existing car club market. Conversations could include whether any nearby car club vehicles could be moved to a prominent, publicly accessible location at the new development, e.g. to an on-street bay on Market Street, to make the vehicles more accessible and high-profile.
- **New provisions** – depending on the usage of the existing nearby vehicles and the likely demand from the new development, developers can fund one or more of: the purchase of new vehicles; EV charging infrastructure; and the costs for the relevant ‘lining and signing’ of the car club bay. New vehicles should be available to non-residents of the new development. Potential demand for a van available to hire through the car club scheme should also be explored.

While utilisation rates of the existing car club vehicles were not publicly available at the time of writing, based on developments of similar sizes, we would anticipate the developer at this site funding:

- Free memberships and driving credit to encourage residents of the new developments to use any new car club vehicles, as well as existing nearby car club vehicles.

- Three new car club vehicles, and any necessary installation costs, such as 'lining and signing' if they are on the public highway. We would also encourage the developer to work with the operator explore the potential for a car club van, which could be particularly useful to local businesses as well as residents.
- The EV charging infrastructure for any new car club vehicles, and we would encourage the developer and operator to consider whether existing vehicles could be converted into electric vehicles, with support from the developer.

## 5.2. Bike share

We recommend that the developer work with a company like App Bike, or a local bike shop or cycling charity, to have a managed pool of bikes available for hire at a low cost, with some free rental credit. While folding bikes are useful, the advantage of conventional pedal bikes is that there is usually no learning curve needed to be able to use them, assuming people can ride a bike. Bikes should include helmets, lock, lights etc.

While for car clubs it is all but essential for the long-term viability of the scheme for members of the public to be able to access as well as residents, for a small pool of bikes such as this, we feel it could work either as a closed scheme for residents of the development or an open scheme that non-residents can benefit from. The advantage of a closed scheme is that storage could be somewhere only residents can access, e.g. adjacent to the bike parking area. The advantage of an open scheme would be that more people can benefit from the provision. Regardless of model, ongoing management costs will need to be covered once the developer contributions have ended. This could be through flat service charges, residents parking permits, hire fees or other sources such as sponsorship. We discuss this in the recommendations section, below.

We would recommend working with the bike sharing operator to investigate the feasibility of providing a range of shared bikes in addition to conventional pedal bikes, such as e-bikes, e-cargo bikes and adapted bikes. Other possibilities include providing trailers instead of an e-cargo bike, or panniers and pannier racks for shopping trips. Provision could also be linked to local cycle training, such as Bikeability training courses for adults.<sup>33</sup>

## 5.3. Other factors

It is positive that that residents who do opt to purchase a car parking space in the new undercroft car park will be charged and that it will be done on a quarterly basis not annually.<sup>34</sup> We would encourage the developer to go further if feasible, charging on a monthly basis. Charging more frequently limits the likelihood that parking becomes a 'sunk' cost that encourages car use.

Income from residents' car parking should be used to support car clubs and bike sharing provision to allow for residents to benefit from the scheme beyond the standard timeframe of developers' contributions.

<sup>33</sup> <https://www.bikeability.org.uk/get-cycling/cycle-training-for-adults/>

<sup>34</sup> Eagle Quarter II, Newbury, Car Parking Management Plan, December 2023, Waterman Infrastructure & Environment Ltd, p.7

## 6. Conclusions

Shared transport is a popular and growing sector that supports transport decarbonisation goals, with car clubs replacing the need for between 9-22 private cars and bike sharing substituting around 245 million car miles annually. This unlocks potential for towns and cities to reallocate space for private parking towards other public benefits, such as green space, retail or housing.

The proposed Eagle Quarter development is located in an area with good public transport provision and conditions for active travel, walking especially. Shops, leisure and other amenities are located within easy walking distance. There is strong potential for more shared transport in the area. Being a build-to-rent development, the proposals are only likely to increase demand for shared transport, so it is welcome to see proposals from the developers to provide three further car club vehicles in the area, along with bike sharing provision for residents.

The proposals to provide the equivalent of 0.5 parking spaces per unit at the Eagle Quarter are welcome and will be enabled through the developer's provision of shared transport at the site. The parking levels will in turn encourage people to use more sustainable modes of transport, including car clubs and bike sharing. The three car club vehicles the developer is planning to fund remove the need for between 27-66 private car spaces at the development, likely the higher end of this estimate, given that renters are less likely to own cars in the first place. These vehicles can be used by many more than 66 people, as car club members typically only need to rent vehicles 1-10 times per year. That said, there are four existing car club vehicles within 10 minutes' walk of the site that can cater to any additional car demand from residents. We also recommend that the developer works with the car club operator to explore introducing a car club van at the site, which could be useful for residents and businesses alike.

A pool of bikes for residents to use at low cost will provide residents with the benefits of access to bikes, without the hassles of ownership, such as purchase costs, worries over theft, maintenance or storage. This will promote active travel among residents as well as reduce the need for some car journeys, and therefore some parking provision.