

Car Club Annual Report London 2021



CAR CLUB MEMBERS



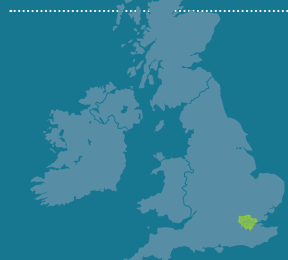
TOTAL
623,910

10% increase over 12 months

ACTIVE
330,008

74% increase over 12 months

FLEET SIZE



3,582

car club vehicles in London
down from 3,886 in 2020¹

A USEFUL TOOL FOR TRIPS WHICH CAN'T BE DONE BY OTHER MODES



43%

of respondents said
they used the service for
carrying bulky items



35%

of respondents said
there were no suitable
public transport options

REDUCING PRIVATE CAR OWNERSHIP



24

private cars replaced by each car
club vehicle in London in 2021

85,552

Estimated total number of cars
removed from the road in London by
currently active car club members

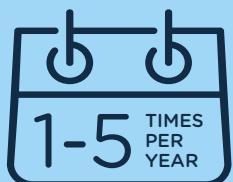
ACCESS TO OPPORTUNITIES



54%

agreed that membership
allowed them to travel to
places which wouldn't be
accessible otherwise

LOW CAR LIFESTYLES



63%

of members used
the car club between
1 and 5 times a year

COST SAVINGS



74%

agreed that car club
membership saved them
money compared to
owning a car



28%

of respondents said
that saving money was
a reason for joining the
car club

SUSTAINABLE TRAVEL



75%

of respondents use public transport
at least once a week. On average in
London 42% of people use the local
bus once a week and 19% use rail
once a week



36%

have used a bicycle
at least once a week,
on average in London,
23% of people cycle
once a week

1. 1 November 2020 to 31 October 2021

2. Affected by supply of vehicles and Covid recovery

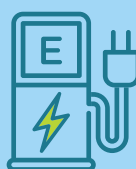
FUEL TYPE



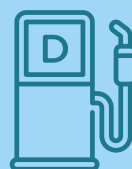
62%
petrol



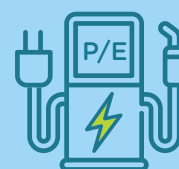
12%
petrol
hybrid



12%
electric



12%
diesel
(vans only)



2%
plug-in
hybrid

ELECTRIC CARS



12%

of the car club
cars in London
are electric



1%

of private cars
in the UK are
electric³



87%

of respondents were
satisfied with driving
the electric car club
vehicles

“Car club has helped me to contribute to lower my own carbon emissions footprint and personal driving costs, whilst affording me the flexibility to make trips that I need to.”

“I don’t own a car because I live in London and the cost of a car is expensive. I don’t need one everyday but sometimes need a car or van for bigger shopping or visiting families with lot of gifts.”

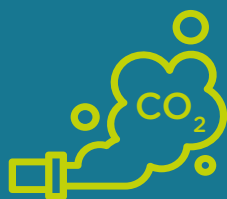
CLEANER AND SAFER



100%

of car club cars are
under 5 years and 74%
are under 2 years old

CARBON EMISSIONS



26%

lower carbon emissions
from London cars than
the average UK car⁴

“Changed my life! Honestly as a born and bred Londoner you don’t often need a car, but it’s so wonderful to have the option. I wish more people would do it!”

3. Department for Transport, VEH0105 and VEH0132b

4. CoMoUK car club research report 2020



Foreword

Welcome to this London-specific cut of our long-running series on the impacts of car club use in the UK. In a world where many transport choices remain altered from before the pandemic, and where we see the number of active car club members in London shooting up, we also again find that car club use gets people out of private car ownership and keeps them out of it. This is critical to London's goal of being a net zero carbon city by 2030 and to the Mayor's Transport Strategy goal of 80% of journeys being by sustainable modes by 2041.

People are voting with their feet and sending the UK car club sector to new highs. London is no exception, with active membership up by 74% from October 2020 to October 2021 on a very slightly reduced (and still very modest) fleet size. Nonetheless, the overall race to decarbonise transport is one we are very far from the finish line of. Our latest work here finds that each London car club car is displacing no fewer than 24 private cars. This is heavy lifting on decarbonisation, liberated space, better air quality and better places in action.

We recently published [Driving London Forward](#) which looked at the future potential of car clubs in London and found that London has a further 650,000 households that could give up a privately-owned car. In turn that would take 300,000 private cars out of London. 17 London boroughs have more than 20,000 switchable households.

While these big numbers and big picture points are very important, the human impact also leaps out to me from our findings. The amounts of money people can save; and the broader dividends they report to us as finding. I think it is very motivating and rewarding to hear that car clubs played a role in changing someone's life, that they decongest the streets people live on, that they save people thousands of pounds.

With a context of sharp increases in the cost of living, 74% of London respondents told us this year that car club membership saved them money compared to owning a car. We are the national charity for shared transport and across all our work aim to understand and promote its public benefits. For more on our work across shared transport, visit us at como.org.uk.

Richard Dilks,
Chief Executive, CoMoUK



Introduction

This London CoMoUK Car Club Annual Report 2021 describes data collected from car club operators for the period 1 November 2020 to 31 October 2021, alongside data from our car club user survey, collected in Autumn 2021. This research has been created and carried out by CoMoUK with input and contributions from car club operators, and has been verified by Dr Sally Cairns, research consultant.

Methodology

Over the last 15 years, CoMoUK has collected a consistent range of data from car clubs about the characteristics of their members and information on their fleets, as well as surveying car club members about their travel behaviour. For this report, data was collected from the main national operators in London (Zipcar, Enterprise Car Club, Ubeeqo and the car club subsection of Hiyacar). All of these companies operate services where cars are returned back to a set bay or geo fenced parking permit area. Zipcar also provides a service to use cars for one-way trips in permitted zones. Due to the sensitivities of publishing data from a single operator the report combines data from all models.

The data was collected in two parts:

- A car club members' survey, which was completed by 4,679 London-based respondents
- A car club operators' survey which gathered data on operational vehicle usage

Car club fleets often contain vans as well as cars. Members who only used vans and not cars, plus those who only use the service for business trips, were excluded from the analysis. This report provides an overview of the key findings.

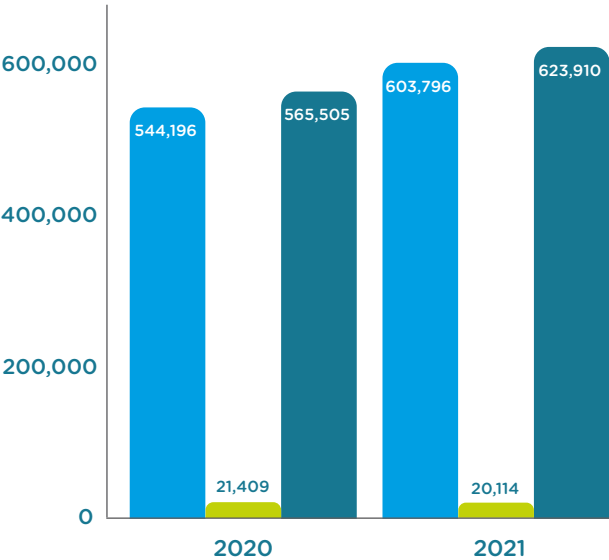
Car club membership

Membership of car clubs in London is growing strongly, and total membership is now at 623,910 people, a 10% increase over 12 months. There has been a steady increase year on year since services launched, with a spike in demand in 2020 induced by the Covid pandemic and overall, there has been 234% increase over the last 5 years. The number of active members (i.e. those who have joined, renewed their membership or used a car club vehicle in the last year) stands at 330,008 which is a considerable rise from a year ago (189,275), an increase of 74%.

This increase is likely to be a combination of the increased activity of the new 2020 members after the Covid 19 travel restrictions and the addition of new members in 2021. There has been a particular increase in active corporate membership over the period, even though the total number of corporate members has reduced. As can be seen from later sections of the report, car club users remain infrequent drivers.

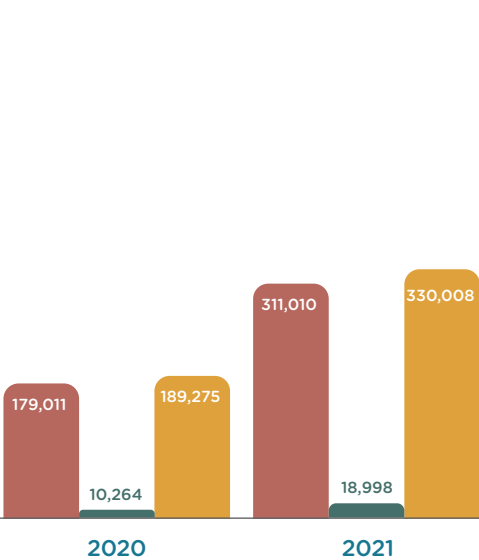
Car club membership growth
All members

- Individual
- Corporate
- Total



Car club membership growth
Active members

- Individual
- Corporate
- Total



It is important to note these figures represent total memberships numbers. As 36% of survey respondents indicated they joined more than one car club, it will include some duplicates. However, at the same time, some households will have more than one person benefiting from one membership. The majority of those who said that they were members of more than

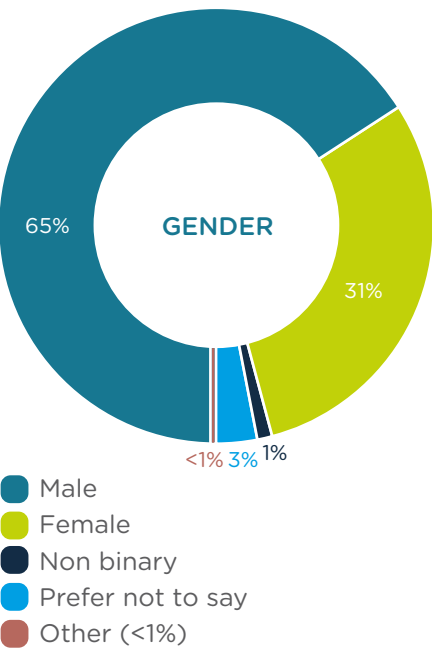
one scheme said that one reason was to increase availability of vehicles (59%). Nearly a third indicated that it gave them a choice of type of vehicle. 23% said that it enabled them to access cars in different locations.

Only 8% of survey respondents hadn't used the car club in the last 12 months.

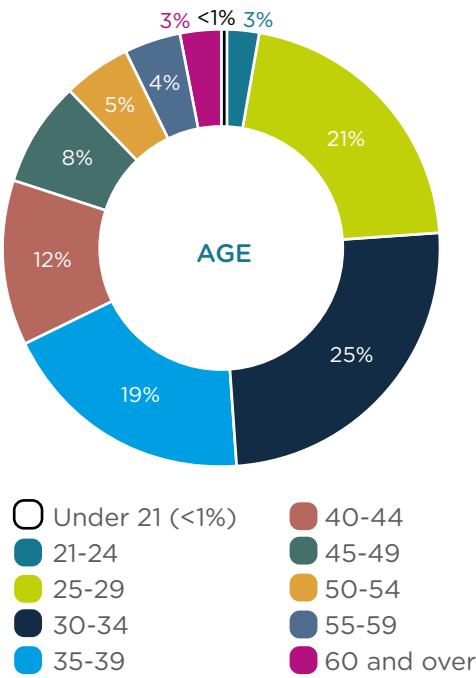
“I recently travelled by train to Plymouth and Wakefield from London and to my delight both cities had car club vehicles which I was able to use.”

Membership demographics

The majority (65%) of those responding to the survey identified as male.



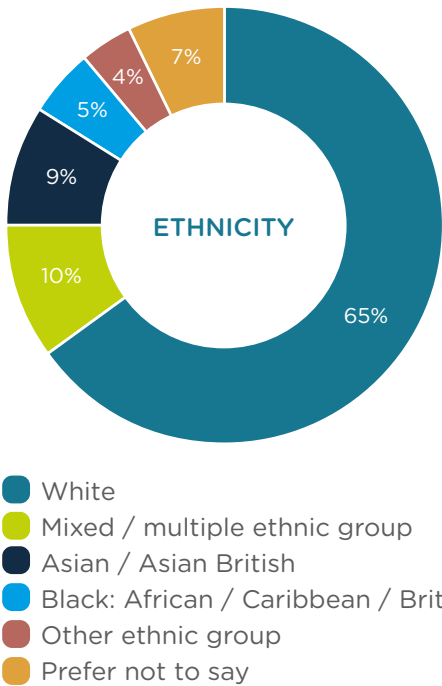
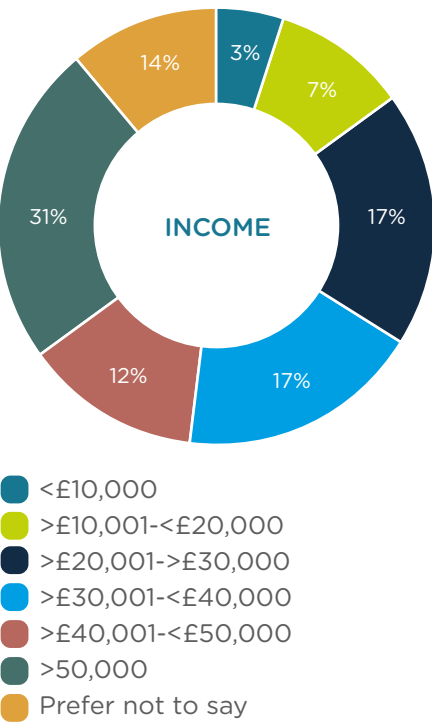
Operator data indicates the majority of members in London are between 25 and 44.



When asked about personal income levels, there was a spread of responses, with 43% of respondents earning over £40,000 and 10% earning under £20,000. A Mosaic analysis⁵ of members from postcode data also shows a range of income groups among London car club users, with as many people coming from areas with wealthy

demographics as are coming from areas with social groups typically on more limited budgets.

In terms of ethnic background, 65% of respondents were white, 10% were Asian, 9% black and 9% from other ethnic or mixed heritage groups.

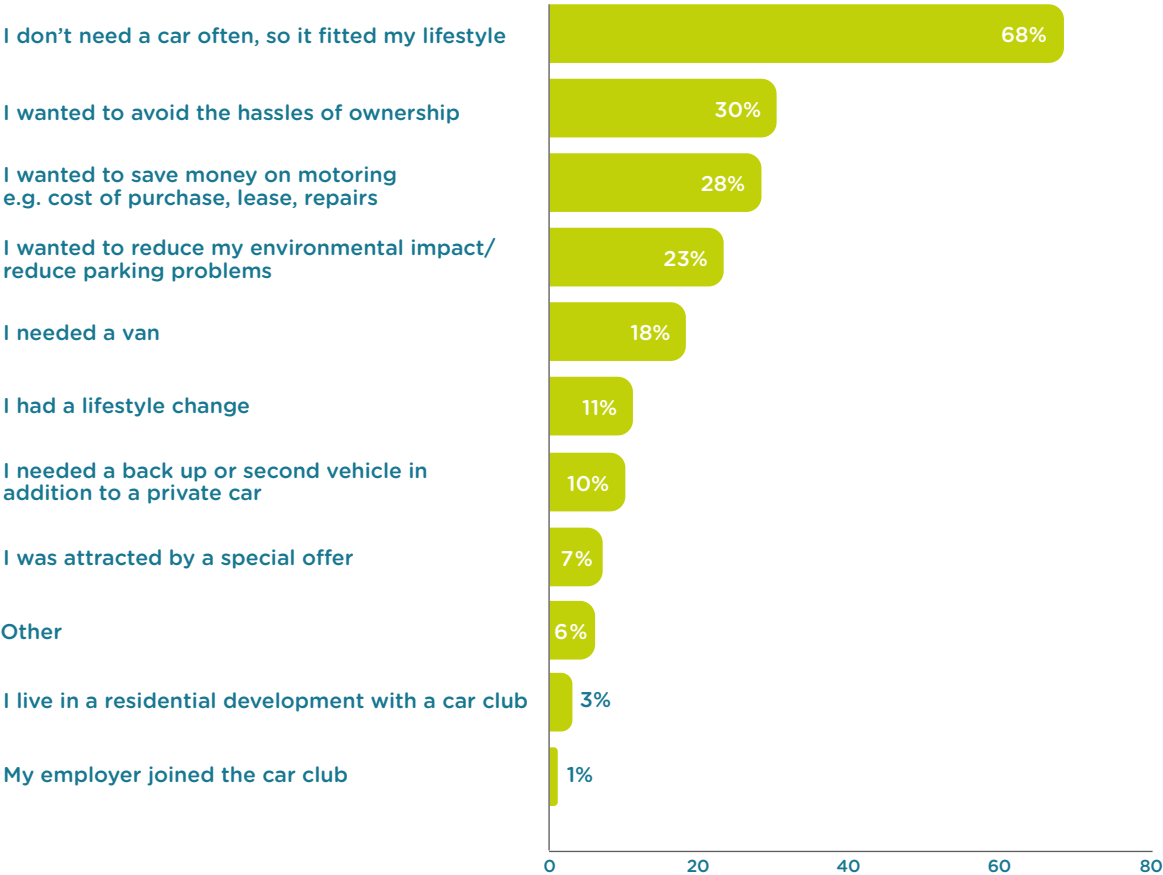


5. Details available on request

Motivations and benefits

The survey asked questions about members' motivations for joining a car club. The results painted a picture of members who had car-light lifestyles and wished to reduce the costs, the stress, and the environmental footprint of driving. The majority (68%) said they rarely use a car; this is explored further in the section on trip patterns.

Reasons for joining a car club (respondents can choose more than one option)



68%
of respondents said
that a reason for
joining a car club was
because they don't
often need a car

"I can go to the supermarket, put all the shopping in the car & I don't have to be struggling on the bus."

Cost savings

28% of respondents said that saving money was a reason for joining the car club and 74% agreed that car club membership saves them money compared to owning a car. Most members use the service between 1-5

times per year, which is likely to cost a great deal less than running a private car when all the costs of owning a car such as finance, depreciation, maintenance, insurance, tax and parking permits are considered.



28%

of respondents said that saving money was a reason for joining the car club



74%

agreed that car club membership saves them money compared to owning a car

“So satisfying not to have to pay the many costs of owning a car in London: depreciation, maintenance, fuel and oil, parking, car tax, insurance. And so nice to have use of a fleet of nearly-new cars and vans which somebody else looks after.”

Equitable access to opportunities



54%

of respondents agreed that car club membership allowed them to travel to places which wouldn't be accessible otherwise

“Allowed me to take my kids to Legoland on their birthday. Magical, especially since Covid times.”

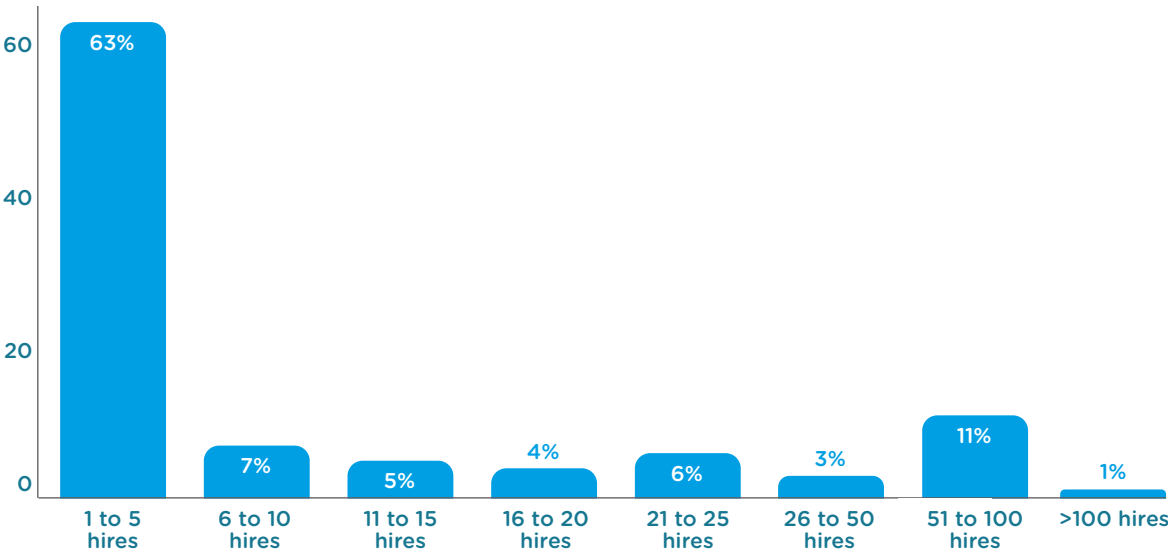
“I've had Covid, and I'm still not fully fit, months on. The car club cars have been really useful for getting to parks and to the place I volunteer once a week. Otherwise I'd be far more stuck at home. We're urban - we don't normally need a car - but right now, it's really helped.”

Journey profiles

When examining operator data over the period November 2020 to October 2021, the majority (63%) of members have used the car club less than 5 times over the year, although travel may have been reduced due to Covid-19. The remaining 37% were spread evenly across the remaining categories

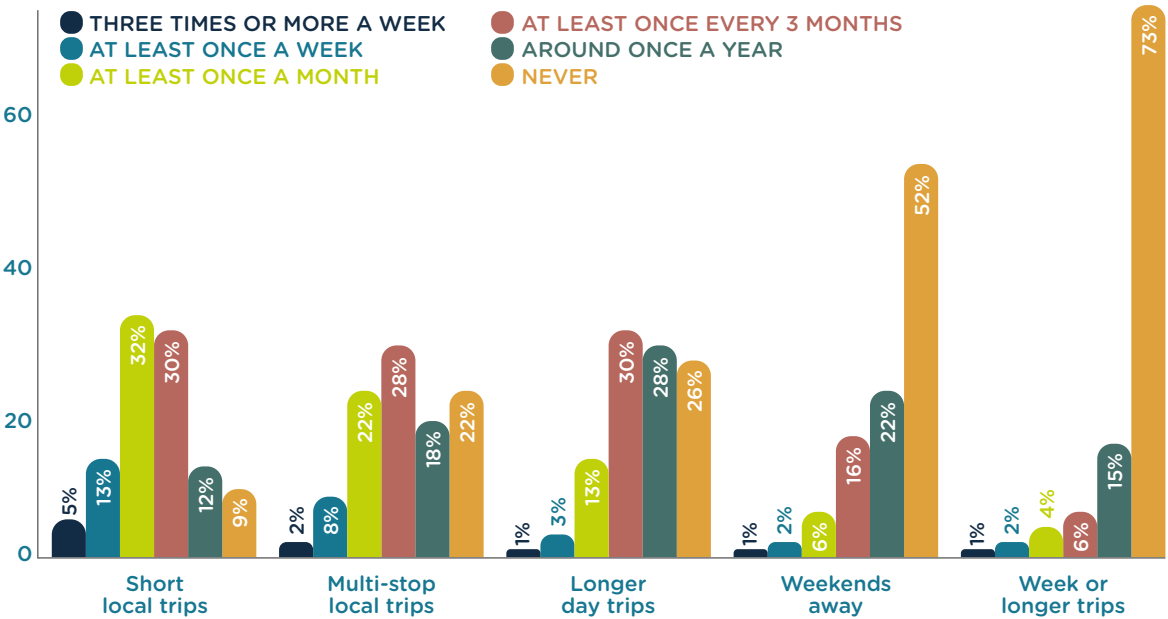
with 11% hiring 50-100 times a year, the equivalent of once or twice a week. By way of comparison, on average in London 68% of people use their private car once a week or more, however some car club members will also own their own car.

No of hires



The members survey provided a second source of data on trip frequency and lengths. It offered survey respondents options from short local errands to weekends away. The responses indicated an emphasis on using the service either monthly, quarterly, or for annual trips. Broadly, responses include people carrying out longer duration trips less frequently and shorter duration trips more frequently.

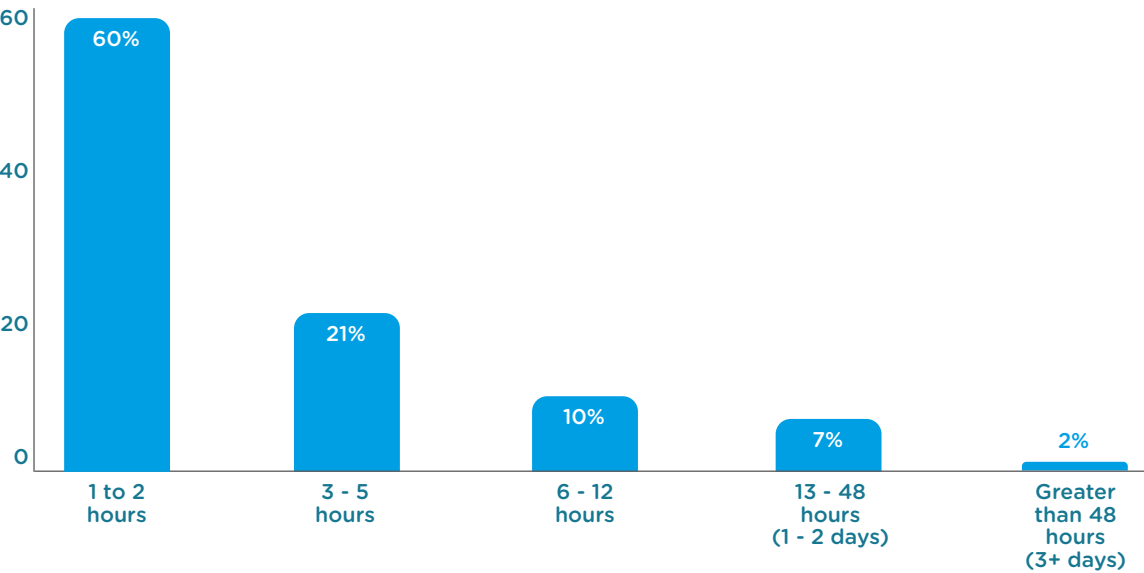
The numbers doing weekly trips were lower, with only 18% doing short local trips at least once a week. It is worth bearing in mind that London journey times are significantly longer per mile than in most other parts of the country due to traffic congestion and density of population. This means that a longer trip time wise may still be shorter in terms of mileage than in most other parts of the UK.



Length of hire in time

The picture of car clubs being used for a range of trip types was further backed up by operator data on hire times. Over half of trips (60%) were up to 2 hours, 21% of trips were registered as lasting for 3-5 hours and the remainder were split across the longer time periods, from half a day to a weekend. The proportion of shorter trips is higher

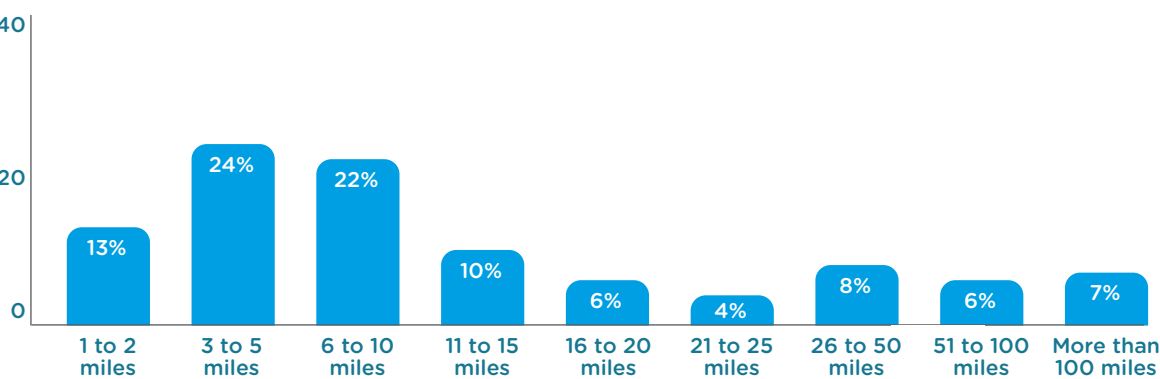
for London than the rest of the UK. This is influenced by the offer of a one-way service which inevitably skews the operator data to shorter trips as it represents only one section of the overall trip. The remainder of the journey may be with another car club vehicle or another mode.



Distance covered per hire

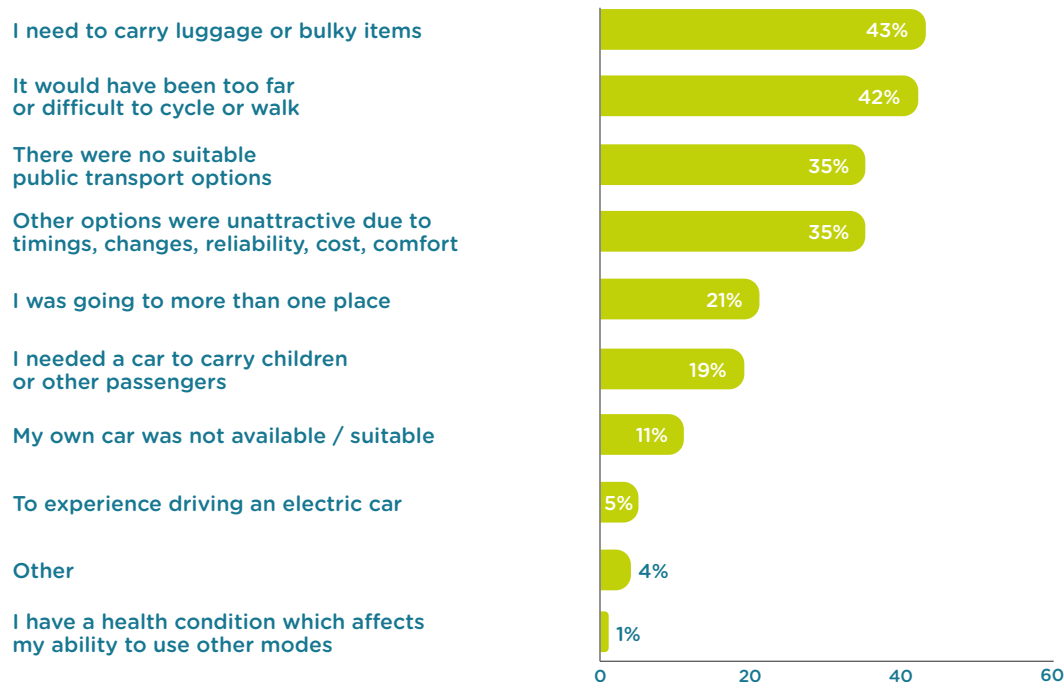
The car club operators also provided data on the range of distances covered in each hire. There is a spread of trips across each of the distance ranges. The most common distance range was 3-5 miles (24%), closely

followed by 6-10 miles (22%) and 1- 2 miles (13%). The remaining trips were spread relatively evenly across the distance bands illustrating that car clubs were used for many different types of trips.

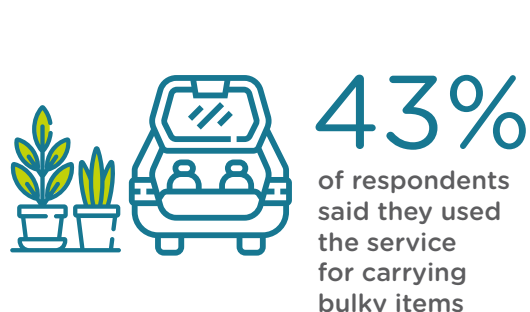


Reasons for car club use over other modes

Respondents were asked why they chose to use a car club as opposed to another travel mode (with multiple responses possible). The most commonly selected reasons were trips involved carrying bulky items (43%) and that it would have been too far or difficult to cycle or walk (42%) or that there were no public transport options, or other options were unattractive due to timings, changes, reliability, cost, or comfort (both 35%).



Car clubs are a useful tool for trips which can't be done by other modes:

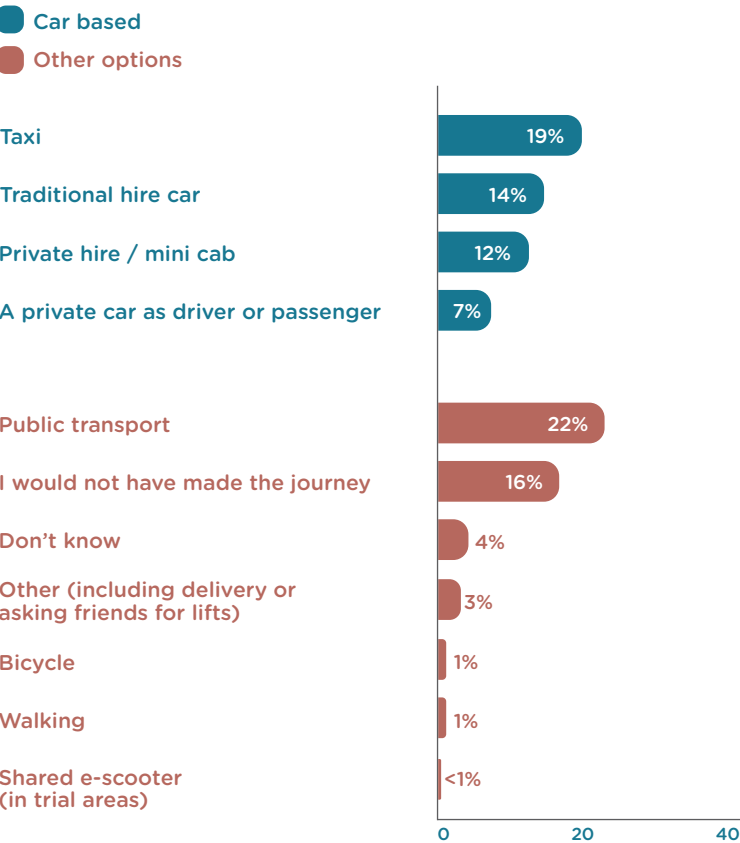


“The car club is incredibly convenient for those moments when a vehicle is a necessity: bringing home a haul from IKEA, bringing the cat to the vet, dropping materials to my allotment or moving to new flat, it ticked all the boxes.”

“I can see my friends and their kids as It’s an easy drive but so difficult on public transport.”

Modal switch

When examining how respondents reported they would have carried out their last trip if they had not had access to the car club, 52% stated they would have used another form of car - either taxi (19%), private hire (12%), car hire (14%) or a private car (7%). 16% said they would not have been able to make the trip, 22% said they would have used public transport and only 3% would have walked or cycled.



52%

stated they would have used another form of car if the car club wasn't available



16%

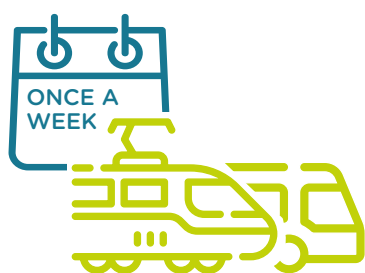
stated they would not have made the journey if the car club wasn't available

“Allowed me to take an elderly friend to his parents’ grave which would have been impossible without the car club.”

“My partner is blind and so cannot use public transport currently as he cannot social distance from people he can’t see. He is also at risk if he caught Covid. This has given us the freedom to visit places and see people we haven’t done since the beginning of the pandemic.”

Sustainable travel habits

The survey responses indicated that car club members typically had higher use of sustainable modes than national averages.



75%

of respondents use public transport at least once a week. On average in London 42% of people use the local bus once a week and 19% use rail once a week.⁷



36%

have used a bicycle at least once a week, on average in London, 23% of people cycle once a week.

“Having a car club as backup for occasional journeys is brilliant. Almost all my journeys are by bike or public transport, but the car club is there for emergencies.”

“Car club has helped me to contribute to lower my own carbon emissions footprint and personal driving costs, whilst affording me the flexibility to make trips that I need to.”

Changes in travel habits since joining the car club

The survey asked members to reflect on whether their use of different modes had changed since joining the car club. Around a third of respondents (29%) said they had reduced their use of a private car, with 14% reducing a little and 15% reducing their use by a lot.

Although 12% said they had increased their use of public transport since joining the car club, 25% of respondents reported reducing their use of this mode, which could be partly

related to Covid. In a separate question, we specifically ascertained how Covid-19 had affected members' use of public transport - 25% said that, as a result of Covid-19, they had reduced their travel by public transport a little and a further 27% had reduced it by a lot.

Use of other modes was relatively static, which may be due to members shifting into low car lifestyles with high use of sustainable modes before selling a car and moving to car club membership.

7. Comparable data was not available on the use of the underground

Environmental benefits of car clubs

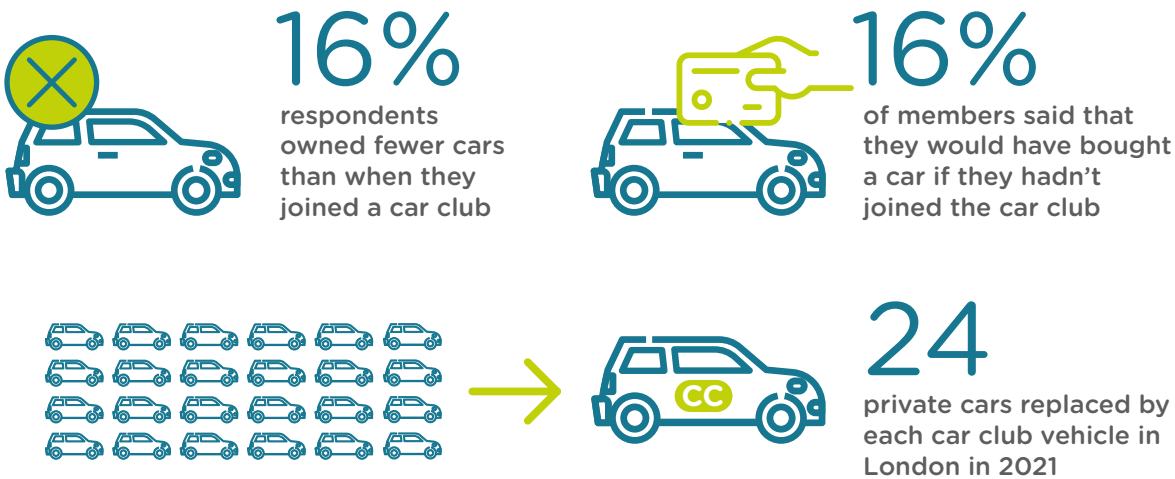
Reducing space required for cars

Car clubs replace privately owned cars with a much smaller number of more efficiently used vehicles, freeing up considerable amounts of street space for other uses. When asked about changes in car ownership, 16% of respondents stated they owned at least one car fewer than when they joined a car club, whilst 4% had increased their private cars. 23% of respondents said they would otherwise have bought a car if they had not joined car club, including 16% of respondents who did not report changes to personal car ownership.

We estimated that each car club vehicle in London is replacing around 24⁸ private cars. This is a similar to the 2020 figure of

23 cars replaced. While the percentage of those who gave up a private car is fairly static, the number of members per car increased in 2021. From this and previous years of research, we know that the number of vehicles replaced by each car club vehicle varies significantly by location type: in areas with higher population density and good public transport provision, more private cars are likely to be replaced. Covid will also have been a factor influencing membership increases and number of cars sold.

The estimated total number of cars removed from the road by currently active car club members in London is 85,552.



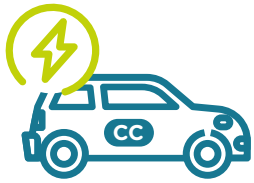
“Car club membership has been a great boon to us. No kerb-side expenses or maintenance of any kind. We are proud not to own a car, feeling we contribute to lowering carbon emissions. A van has occasionally been useful, too.”

“Car club gives us access to a car when it is most needed, so we live car free the rest of the time and don't have a private one taking up space and resources.”

“Sold my new car when commenced remote working.”

8. This figure is generated by calculating the total number of cars reported bought or sold, and then adding in the number of cars that members who have not got rid of a car said that they would have bought. Averaging this number for all survey respondents, and applying it to the number of active members (330,008) implies a total of 85,552 displaced cars. Finally, the number of displaced cars is taken as an average of the total fleet (3,582).

Improving air quality



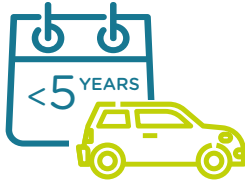
12%

of the car club fleet are electric vehicles. By comparison, less than 1% of private cars in the UK are electric⁹



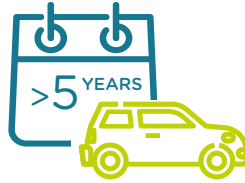
100%

of car club cars are compliant with Ultra Low Emission Zones



100%

of car club vehicles are under 5 years and 74% are under 2 years old



71%

of private cars sold were reported to be older than 5 years, including 28% of the total that were reported to be older than 10 years

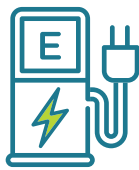
Fuel type



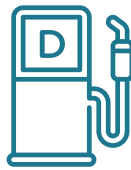
62%
petrol



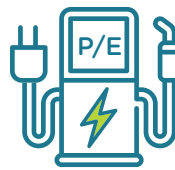
12%
petrol
hybrid



12%
electric



12%
diesel
(vans only)



2%
plug-in
hybrid



0%
hydrogen
fuel cell

Carbon emission reductions from cleaner vehicles – 2020 data¹⁰

The 2021 research didn't carry out a full fleet analysis. From the 2020 figures¹¹, we know that emissions from car club vehicles in London are, on average, 26% lower than the average UK car.

9. Department for Transport, VEH0105 and VEH0132b

10, 11 CoMoUK car club research 2020

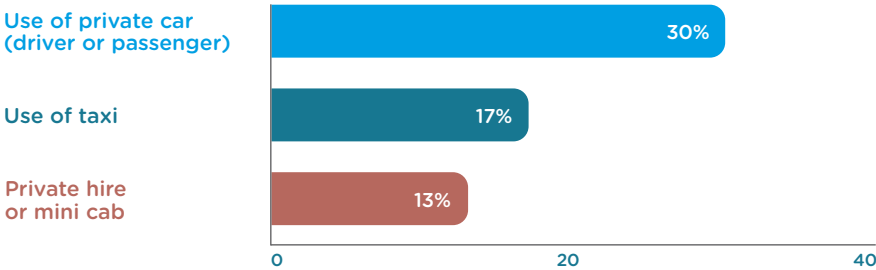
Mileage reduction of car club members

In addition to the carbon savings from using more efficient, cleaner vehicles, there were potentially additional savings from members reducing their mileage. As reported earlier, 29% of survey respondents stated they had reduced their car miles since joining, 14% by a little and 15% by a lot. Out of the remaining respondents only 10% increased their car use, 6% a little and 4% a lot, the rest either stayed the same or said it was not applicable.

The operator data showed that only 12% of car club members were using the service once a week or more, most members are more occasional users of the cars. Looking at both operator and survey data, UK-wide, the average annual mileage was approximately only 150 miles per year per active car club member in a car club car.

However, it is important to factor in the use of private cars, and taxis. 30% of all respondents used a private car at least once a week.

% of people using these car based modes at least once a week



The car club helps car owners to avoid owning a second or third car which could have led to higher mileage. Respondents who disposed of a private car since joining were asked how far they had driven in that car in the 12 months prior to disposing of it. The average mileage in their private car was 5,632 miles (taking a mid-point of each of the answer ranges and an upper band at 12,000 miles) which is significantly higher than the average car club mileage.

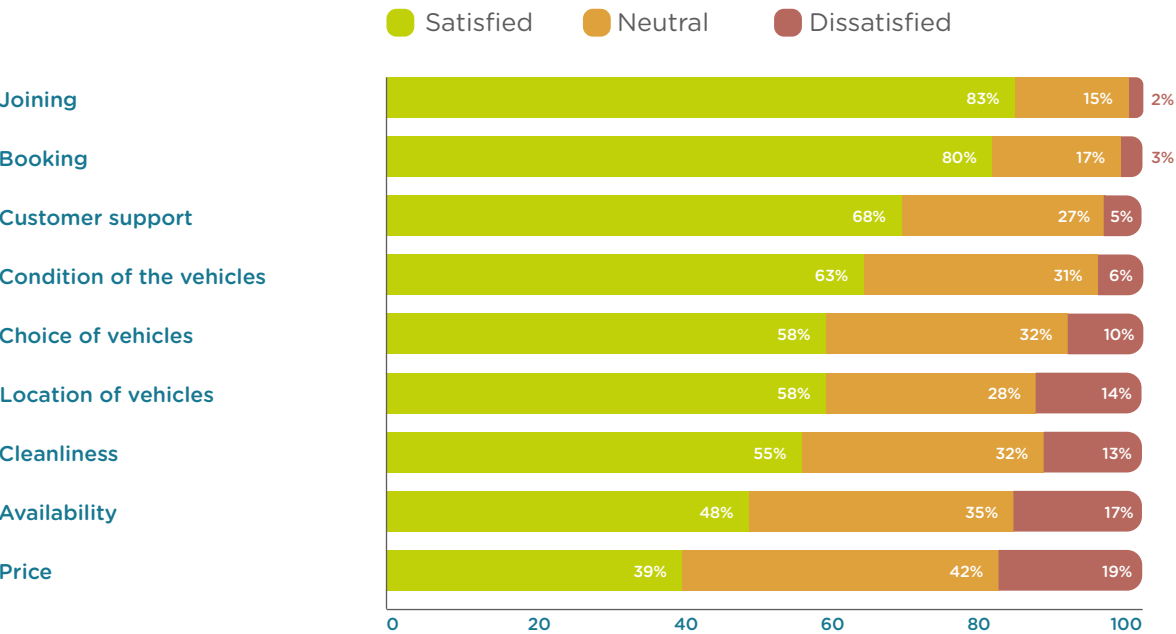
There was insufficient data from the survey to understand car club members' combined mileage, including all travel in car club cars, private cars, taxis and minicabs. However, there is evidence for the car club triggering a switch from driving to other modes, and for probable reductions in mileage once car ownership reduces.



Customer satisfaction

Members were asked about their levels of satisfaction with a range of aspects of the service. The majority of respondents were satisfied with most aspects of the services, from the joining process (83%), to making a booking (80%), and the customer support (68%).

The availability of vehicles scored lower on the satisfaction rating; 48% were satisfied, although 35% were neutral and only 16% dissatisfied. Only 39% of respondents were happy with prices but the majority (42%) were neutral and only 19% were unhappy.



“I tend to cycle and walk more which has made me healthier.
I will never return to ownership of a vehicle.”



Electric car adoption

39% of respondents had used an electric car club vehicle, and were asked about their reasons for using one (with multiple responses possible). 24% of these people said they were curious to try one, 19% were keen to be more environmentally friendly and 19% indicated they preferred driving electric cars. Other people had more practical reasons, such as it being the most conveniently located (12%) or the only option (11%), whilst 3% said it was cheaper.

Satisfaction levels with driving electric vehicles were high, with 87% saying they were satisfied. 70% of respondents were happy with the mileage range.

Excluding the large number of respondents who hadn't had to charge mid-hire, the survey showed that 51% were satisfied with charging, 33% were neutral and 16% dissatisfied.

In terms of charging at the end of a hire, again due to the large proportion of one-way model cars clubs, the majority of respondents hadn't had to do this. Looking at those who had charged at the end of the hire, 60% were satisfied, 29% were neutral and 11% dissatisfied.

Satisfaction levels have increased since the 2020 report when 39% of respondents reported being content in a question asking about mid and end of hire charging.

Those that had difficulties with the electric cars left comments which focused on either a low charge of cars when picking up, problems charging mid-hire or a lack of understanding of how to use charging stations. There were also issues with payment cards.

"The fact that I had to stop for 45 minutes and charge the car (mid-hire) was not fun. This brings up the cost for me and might, from time to time, force me to avoid electric vehicles just from a budget point of view."

"Annoying when the previous club member returns an electric vehicle & doesn't bother to connect up to the charging post, leaving the vehicle with a reduced range."

"Had a real nightmare disconnecting the charging cables the first few hires. Was much better today on hire 4."



87%

of respondents were satisfied with driving the electric car club vehicles

Data, contacts and further information

The CoMoUK Car Club Annual Report 2021 for London has been published by CoMoUK to continue to build a strong evidence base about the sector.

The data in this report was compiled by CoMoUK with input and contributions from commercial car club operators and independently verified by Dr Sally Cairns of Sally Cairns & Associates.

CoMoUK is the national charity dedicated to the public benefit of shared transport. We work across the car share, bike share, lift share, e-scooter and flexible bus sectors. We work closely with local, regional, transport and national authorities. Our accreditation schemes for car clubs, bike share and mobility hubs provide standards for operators and developers and provide local authorities with assurances when procuring services. We want transport to be cleaner, safer, healthier, greener, cheaper, more convenient, and more inclusive.

Get in touch

If you would like to know more about car clubs or any other aspect of our work, please get in touch and we will be happy to help you.

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