



## England & Wales Car Club Annual Survey 2017/18

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supporting shared transport

**steer**

# Foreword

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As the new Chief Executive of CoMoUK I am delighted to present this latest evidence for the many ways in which car clubs bring public and personal benefits, playing an important role in tackling climate change, the economic and social impacts of congestion and making communities more sustainable.

This 2017-2018 report reinforces an evidence wall spanning a decade which demonstrates that people who use car clubs switch to low-car lifestyles. Having access to a vehicle without the need to own one turns the relationship with the car on its head. Without the need to finance ownership of a car and its associated costs, members are able to distribute their mobility budget more evenly across all modes. Without the cost being largely sunk into the vehicle itself rather than its use, they are liberated to make those journeys by car that really merit the use of a car. As a result, there are less vehicles cluttering the street, each being used more efficiently by multiple drivers. The data shows that each car club car displaces 6.1 private cars and a further 12 purchases are deferred. As this report further underlines, we see members decreasing their annual household mileage and using sustainable modes much more than the national averages.

In addition, we know that each trip completed by a car club vehicle will result in lower emissions due to the use of the cleanest technology replacing much older vehicles. With access to zero tailpipe emission vehicles continuing to be constrained by vehicle price and availability now more than ever is the time when car club membership offers an extremely good value passport to zero or low emission vehicles.

CoMoUK's role is to raise awareness and support the growth of shared mobility services. As the transport landscape rapidly incorporates successive technological changes, we want to ensure that the important role of behaviour change illustrated in this report is kept front and centre in policy making. In that spirit, CoMoUK very much welcomes the DfT Future of Mobility Strategy. It is encouraging to see a switch of emphasis from modes to mobility and a recognition of the importance of shared modes in ensuring there is a fair and efficient use of resources. We are keen to see a supportive policy framework to enable car clubs to be rolled out across all communities in the UK in order to maximise their contribute to environmental, economic and health policy objectives.

Richard Dilks  
Chief Executive, CoMoUK



# Executive Summary

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# Executive Summary

The England & Wales Car Club Annual Survey was completed by almost 2,500 car club members of Co-wheels, E-Car and Enterprise Car Club, from a membership of around 25,800, a response rate of around 10%. Of those members 14,391 are active having used a car club car in the last 12 months. Within England & Wales there are several other car clubs, including community car clubs, which have not been included within the survey. Car club annual surveys have also been conducted for London and Scotland and have been reported separately.

Co-wheels, E-Car and Enterprise Car Club supplied information about their fleet, car club usage and membership characteristics for the period starting in March 2017 until April 2018.

This report contains three sections: members survey, emissions & fleet profiling and operators survey. The results of the survey indicate how car clubs can help to:

## Reduce private car ownership and usage

- Members disposed of 4,747 vehicles since joining a car club, using the 783 available car club vehicles provided by the three operators.
- Long term members decreased their annual household mileage by 793 miles.

- 8.4 years old was the average age of vehicles disposed of in the last year by members.

## Enhance modal shift

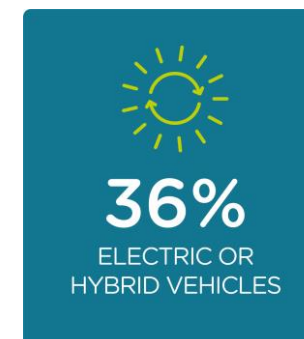
- 68% of members use another shared mobility service other than a car club.
- After joining a car club, members completed 3,832 more walking and cycling trips.

## Use more environmentally friendly cars

- 36% of the car club fleet is either hybrid or electric
- 43% less carbon from tailpipe emissions compared to the average UK car

## Improve car safety

- 86% of the car club fleet has achieved the NCAP 4 or 5 Star safety standard.



# England & Wales Car Club Annual Survey

This is the tenth edition of the Car Club Annual Survey for England & Wales and covers the period March 2017 – April 2018. It has been administered by Steer on behalf of Co-wheels, E-Car and Enterprise Car Club, with review by CoMoUK. The analysis is based on a members survey distributed by the three operators and operator data.



## Members profile



There are **25,773** members in England & Wales (excl London)



A decrease in car ownership of **4,747** cars across members



Around half the members are aged under 40



Average decrease in annual household car mileage by long-term members was **793** miles

**33** members per car club car in England and Wales

**12** deferred car purchases for each car club car

**200,000** miles driven in electric car club cars

One third of all members have used an electric car club car, **more than ¾** rated the experience of driving an electric vehicle as **good or very good**



The full England & Wales Car Club Annual Survey is available online:  
[www.como.org.uk](http://www.como.org.uk)

Members saved **364 tonnes of CO<sub>2</sub>** in one year by using car club cars rather than an average UK car

Car club cars in England and Wales produce **43% less CO<sub>2</sub>** from tailpipe emissions than the average UK car

Each car club car displaces **6.1** private cars

**25%** of members decreased their use of a private car, the average age of cars disposed by members in the last year was **8.4** years old

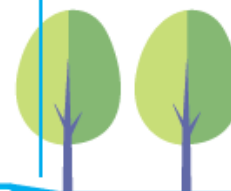
**66%** of private cars sold within the last year were petrol fuelled and **31%** diesel fuelled

Change in weekly trips of all members after joining a car club:

**1,997**  
reduced car trips

**2,523**  
reduced taxi & private hire trips

**3,832**  
more walking and cycling trips



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# 1 Introduction

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# 1.1 Overview

This is the tenth edition of the Car Club Annual Survey for England & Wales, and covers the period March 2017 – April 2018. It has been administered by consultants Steer on behalf of Co-wheels, E-Car and Enterprise Car Club, with independent review by CoMoUK. There are currently four commercial car club operator within England & Wales (excluding London), along with several community car clubs.

This report includes results from Co-wheels, E-Car and Enterprise Car Club member survey and operator survey<sup>1</sup>.

Within England & Wales the car clubs operate round trip models where by the vehicles are located in designated on-street bays (provided by local authorities) or off-street bays (in private car parks and developments). Users may book in advance. At the end of the hire period, users must return the car to the same bay they picked it up from.

## Methodology

We reviewed feedback from key stakeholders (including car club operators and Department for Transport) in response to the 2016/17 Annual Survey to ensure the member and operator surveys were relevant in today's environment.

As in previous years, there were separate surveys of individual members and of operators. The member surveys collected key data on the impact of car clubs on car ownership, mileage, use of other transport modes and user satisfaction. The member surveys were distributed by the car club operators to their members using an online survey link, with an incentive.

For the analysis of the survey it was important to ensure that the annual survey sample of respondents was robust and representative of the member population. Therefore we profiled each operator's total member base using Mosaic<sup>2</sup>, and then compared this profile to the survey respondents and, as necessary, weighted the survey data to the total member population profile.

We have conducted the emissions analysis and profiling of fleets using data from the DVLA (Driver and Vehicle Licensing Agency), VCA (Vehicle Certification Agency), NCAP (New Car Assessment Programme) and vehicle manufacturers.

Using vehicle registration marks and mileage, we undertook an environmental assessment of each car club fleet. This considers:

- Fleet fuel profile;
- Carbon emissions; and
- Safety profile.

The operator survey gathered data from each car club operator regarding details of their vehicle fleet, membership numbers and characteristics of members' car clubs use.

<sup>1</sup>: Zipcar have not participated in this survey this year

<sup>2</sup>: Mosaic is a geodemographic profiling tool which classified residential postcodes into one of 66 Types, based on demographics, attitudes and a wide range of other data from commercial and public statistics.

## 2 Members survey

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## 2.1 Introduction

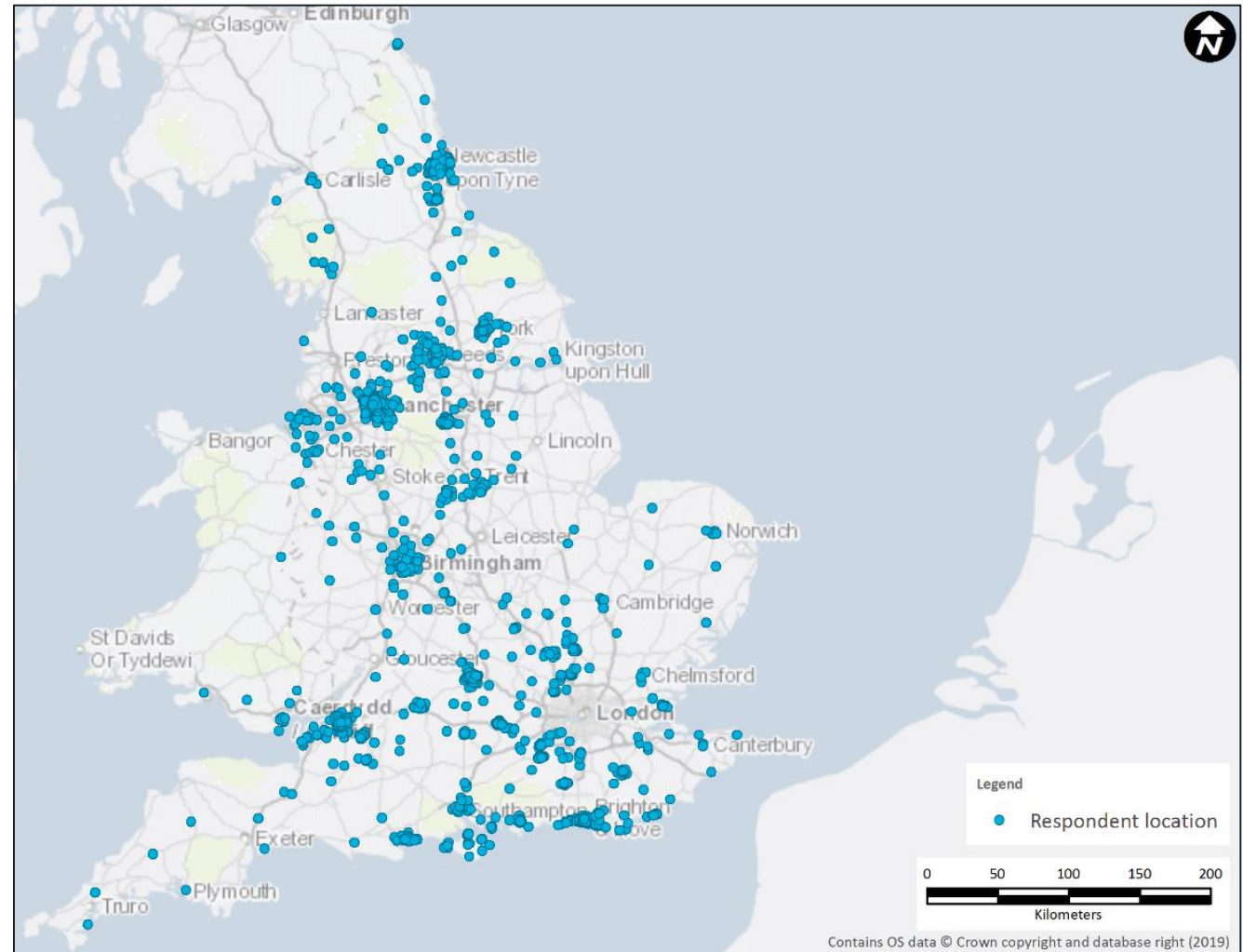
This section provides the results of the surveys completed by 2,470 individual round-trip car club members in England & Wales. Of these, 63% were existing members and 37% were new members who joined in the last 12 months. There are a total of 15,856 round trip car club members in England & Wales, across the three car club operators. A full set of survey questions are available on request.

The map shows the home locations of survey respondents. To ensure respondents of the survey are representative of all members in England & Wales, we worked with operators to profile their total member base using Mosaic Consumer Classification and compared this profile to the survey respondents and, as necessary, weighted the survey data to the total member population profile.

The map shows how car club membership is growing across the country, expanding from major cities to towns and some more rural locations.

The location of car clubs across the UK can be found on the [CoMoUK website](#).

**Distribution of survey respondents registered locations**



## 2.2 Profile of car club users

Based on analysis of member postcodes using Mosaic, the characteristics of England & Wales car club members are shown in the table below and include:

- Motivated young renters in locations close to jobs and amenities (Rental Hubs- 31%)
- Ambitious 20 and 30 year olds in prestige central locations (City Prosperity - 13%)
- Professional families with growing children in good quality housing (Domestic Success - 10%)

Other key Mosaic Types include older households owning small properties in diverse urban neighborhoods (Urban Cohesion - 9%) and younger families in value homes in the suburbs or developments (Aspiring homemakers - 7.5%).

### Key

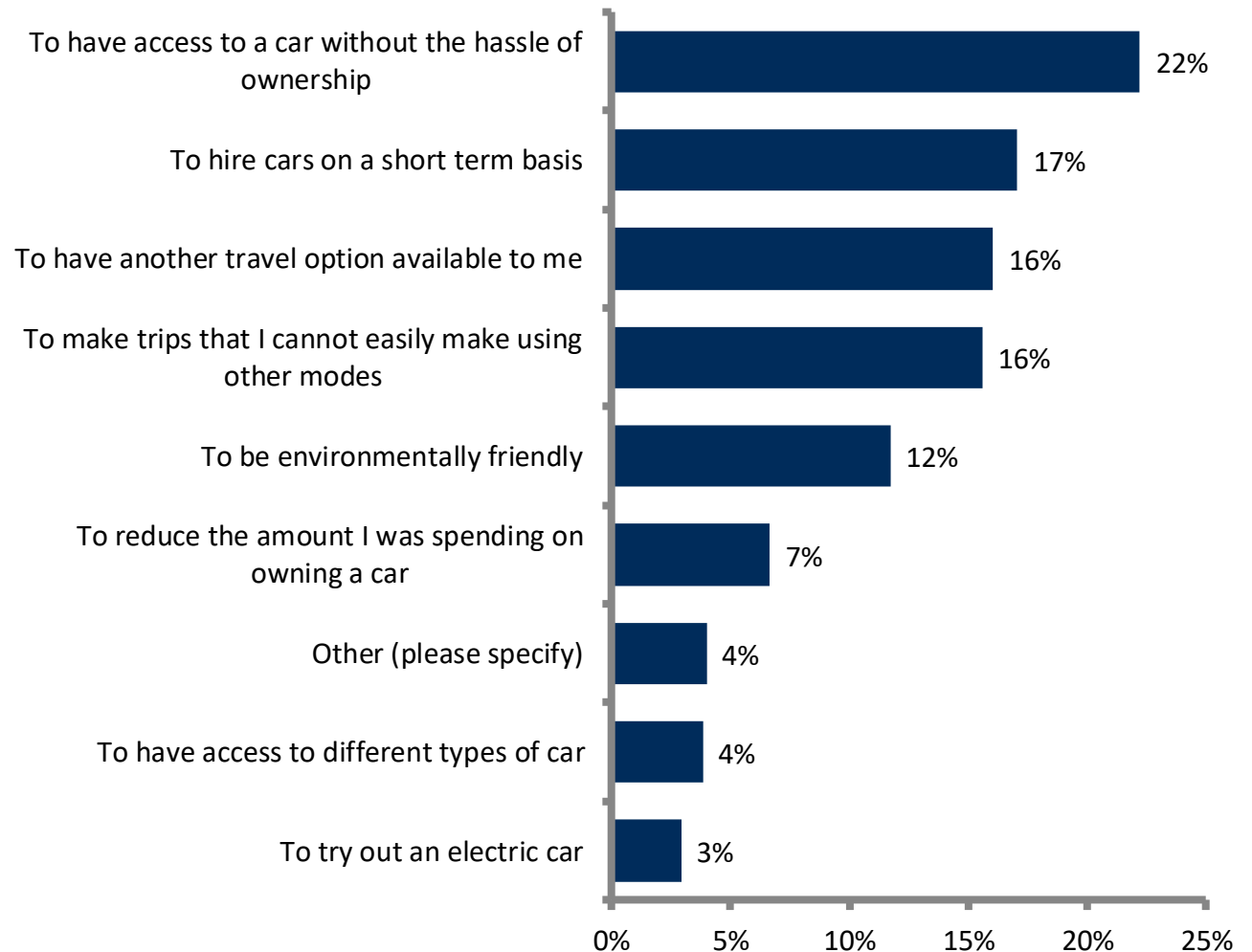
- ↑ Members over representative
- ↔ Members similar to the population
- ↓ Members under represented

Mosaic Type	% of England & Wales members	% of England & Wales population	Members representative of the population	Description
Rental Hubs	31%	6.2%	↑	Contains predominantly young, single people in their 20s and 30s who live in urban locations and rent their homes from private landlords.
City Prosperity	13%	0.6%	↑	City Prosperity work in high status positions. Commanding substantial salaries they are able to afford expensive urban homes.
Domestic Success	10%	8.5%	↔	High-earning families who live affluent lifestyles in upmarket homes situated in sought after residential neighbourhoods.
Urban Cohesion	9%	3.6%	↑	Settled extended families and older people who live in multi-cultural city suburbs.
Aspiring Homemakers	8%	10.9%	↔	Younger households who usually own their homes in private suburbs, which they have chosen to fit their budget.
Prestige Positions	6%	7.9%	↔	Affluent married couples who have financial security and spacious homes in prestigious and established residential areas.
Transient Renters	5%	7.5%	↔	Single people who pay modest rents for low cost homes. Mainly younger people, often living in a property for only a short time.
Senior Security	4%	9.3%	↓	Elderly singles and couples who are still living independently in comfortable homes that they own.
Country Living	3%	7.3%	↓	Well-off homeowners who live in the countryside often beyond easy commuting reach of major towns and cities.
Suburban Stability	3%	6.8%	↓	Typically mature couples or families, some enjoying recent empty-nest status and others with older children still at home.
Family Basics	3%	9.1%	↓	Families with children who have limited budgets. Their homes are low cost and are often found in areas with fewer employment options.
Municipal Challenge	2%	3.8%	↔	Long-term social renters living in low-value multi-storey flats in urban locations, or small terraces on outlying estates.
Rural Reality	2%	6.9%	↓	People who live in rural communities and generally own their relatively low cost homes.
Vintage Value	2%	6.2%	↓	Elderly people who mostly live alone, either in social or private housing, often built with the elderly in mind.
Modest Traditions	1%	5.4%	↓	Older people living in inexpensive homes that they own, often with the mortgage nearly paid off.

## 2.3 Reason for joining a car club

### Members join car clubs to gain additional personal freedom and occasional access to cars

- The chart shows that the most popular reason for joining was to have access to a car without the hassle of ownership (22%).
- The second most popular reason is to have access to a vehicle for a short period of time (17%).
- The third and fourth most popular reasons, both 16%, reference the need for a different mode of transport for certain trips.
- 4% of members chose 'other' as the reason for joining a car club, for most this was because their employer requested them to do so.





## 2.4 Car ownership before and after joining a car club

### Car ownership amongst new members falls after joining

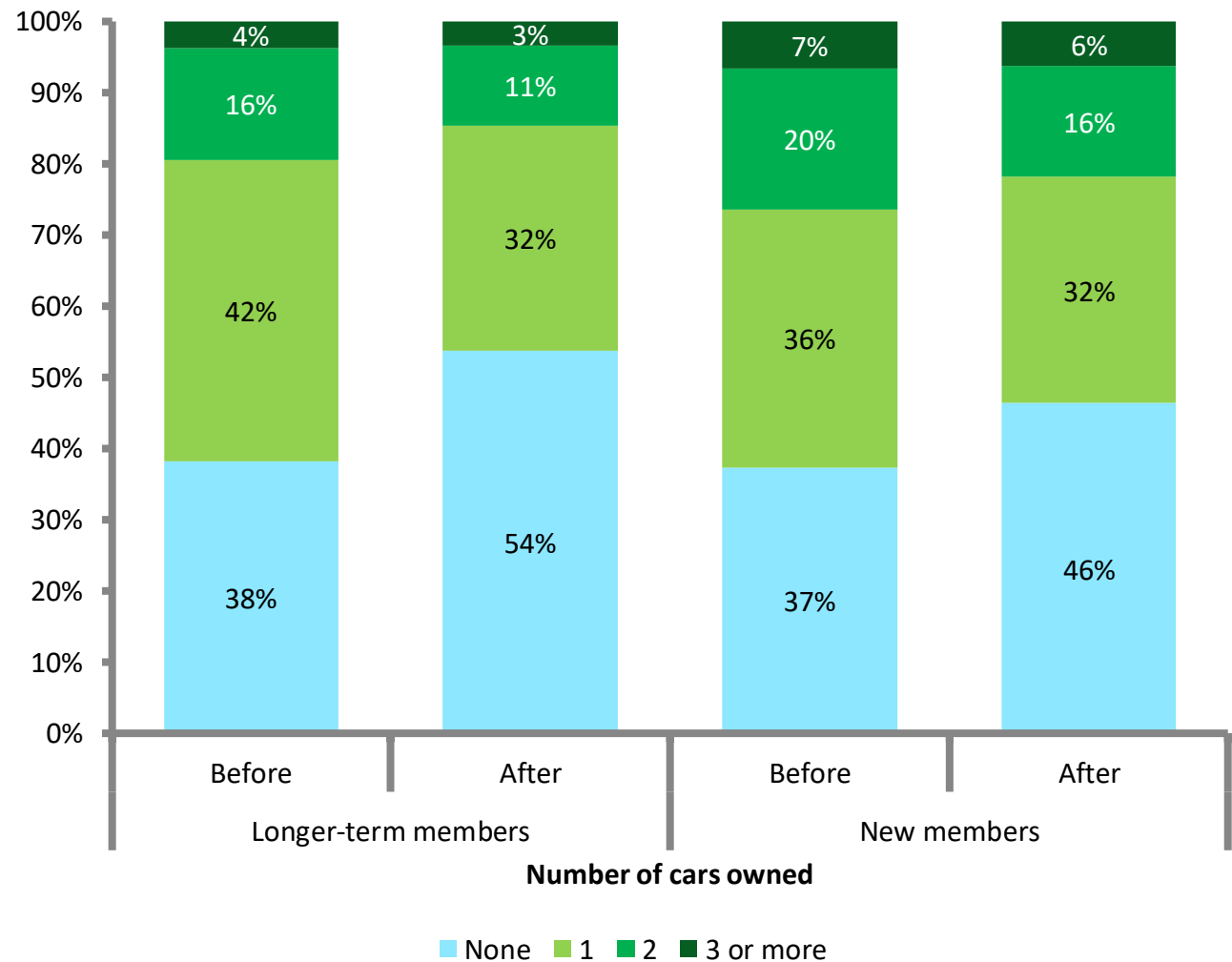
- 63% of new members, who joined in the last 12 months, owned at least one car before joining, falling to 54% afterwards, as shown in the graph below.
- New car club members are more likely to come from households owning multiple cars than longer term members.

### Car ownership remains low amongst longer term members<sup>3</sup>

- Longer term members, show a larger drop in car ownership after joining. 62% of longer-term members owned at least one car before joining, falling to just 46% afterwards. Longer term members also show a bigger drop in their first cars compared to new members.

### Reduction in car ownership

- Across all car club members reductions in car ownership result in 4,747 less privately owed cars (by applying the % reduction in both groups to the whole sample, equivalent to 6.1 less private cars per car club car).

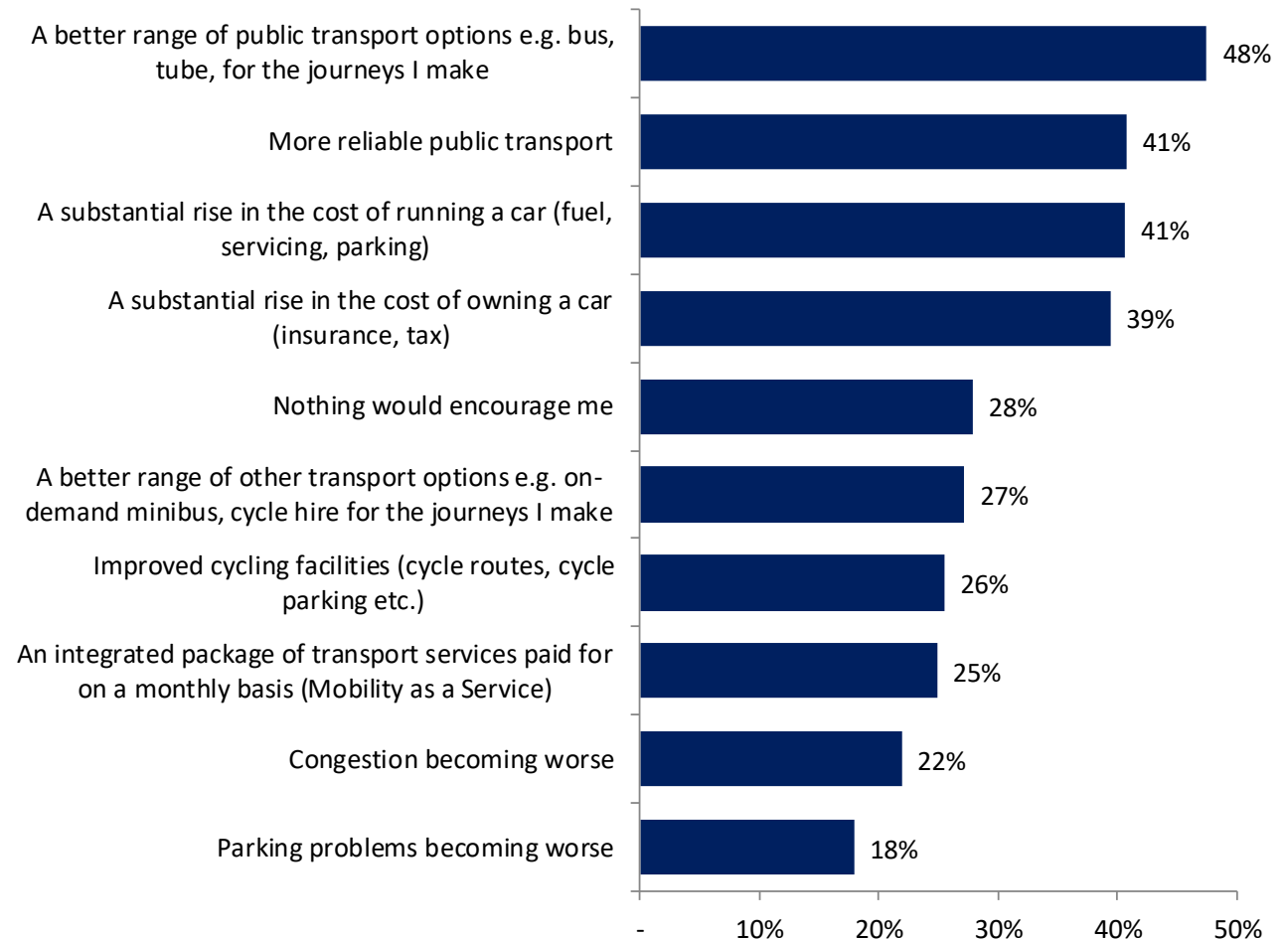


<sup>3</sup>: Longer term members are those who have been members for at least a year – many have been members for a number of years

## 2.5 Impact of car clubs on car ownership

### Car clubs reduce the need to purchase a car

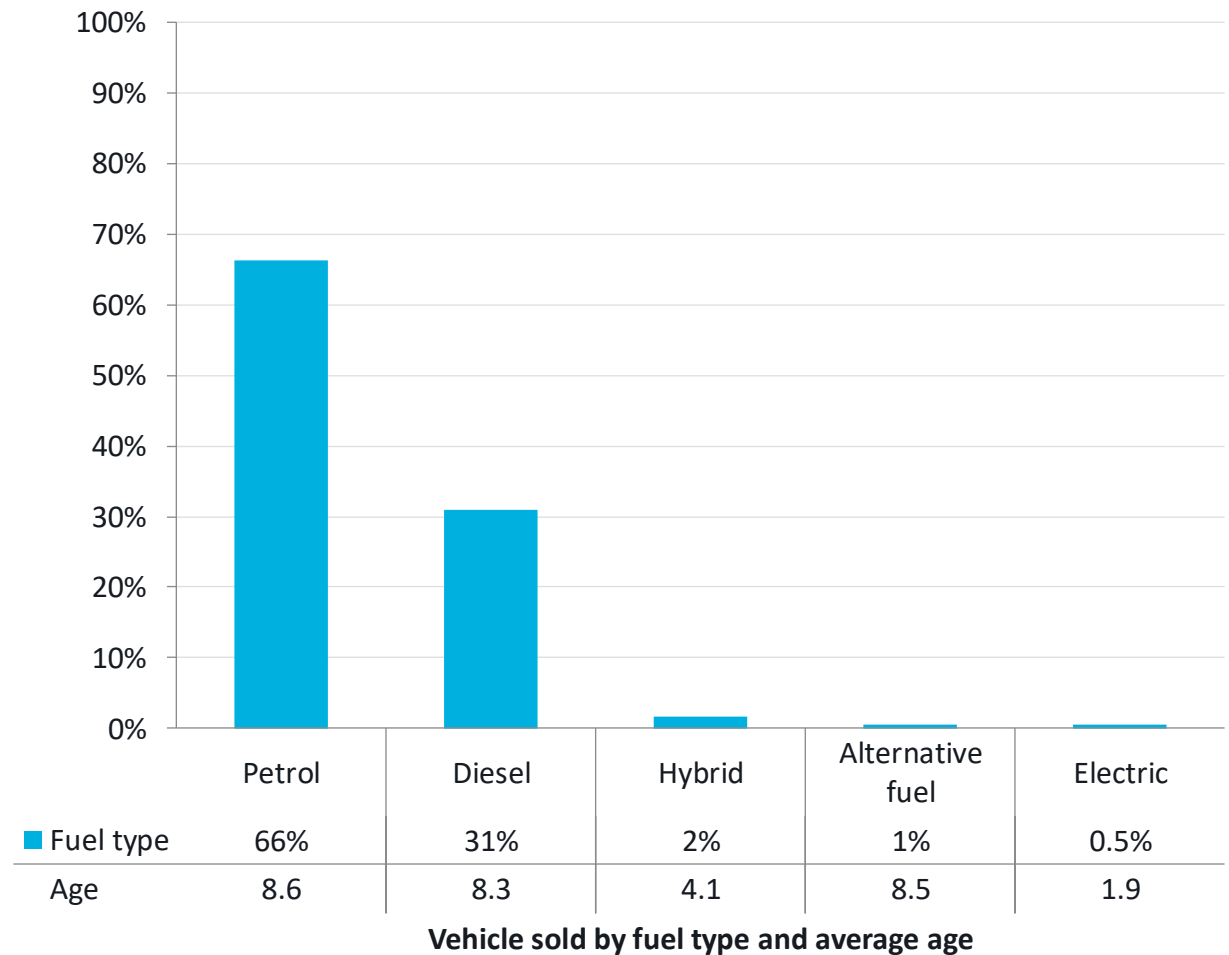
- Respondents who owned at least one car but had not sold a car in the last 12 months were asked to choose from a range of potential factors which would influence them to sell their car in the future. A better range of public transport options was the most popular factor, chosen by 48% of respondents, followed by more reliable transport (41%) and a substantial rise in the cost of owning a car (41%).
- Members were also asked whether they would have bought a new car had they not joined a car club. 36% of members reported that they would have done, equating to around 9,297 deferred car purchases from total members.
- 51% of members said that they are now less likely to buy a private car in the next few years, after joining a car club. 37% said it had had no effect on their decision, 6% said they were more likely and another 6% did not know.



## 2.6 Characteristics of cars sold

### Car club vehicles replace older vehicles and reduce use of petrol and diesel vehicles

- 10% of long-term members reported that they have sold their car in the last 12 months, equating to around 1,081 car sales across long-term members and another 3,224 car sales across new members, as 22% of them reported a car disposal.
- The average car sold by car club members is a 8 year old petrol vehicle.
- Car clubs also reduce the number of trips made by diesel vehicles with nearly a third (31%) of vehicles sold by car club members were powered by diesel.
- The average age of the disposed car was 8.7 years old for long-term members
- The average annual mileage for the disposed car was 7,407 miles across all members.



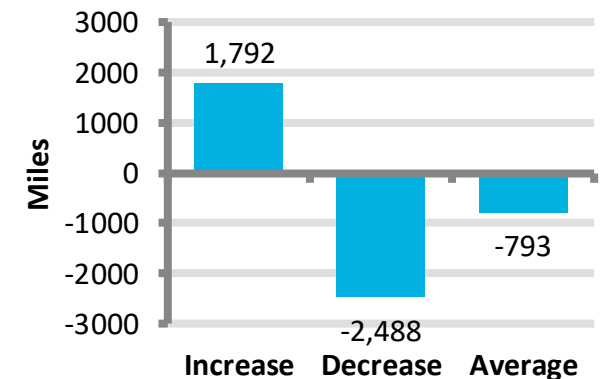
## 2.7 Impact of car clubs on miles travelled

### Joining a car club is associated with a reduction in annual mileage

- The distribution of change is shown on the right; the average increase in annual mileage was 1,792 miles whilst the average decrease was 2,488 miles.
  - The average change in annual household car mileage (for all cars in the household and car club cars) reported by longer-term members after joining was a decrease of 793 miles.
  - These figures include both households owning a car and those who do not own a car and exclude 10% of longer-term members that did not know their change in annual mileage.
  - Many respondents will not have accurate records of their mileage so the figures they have provided are likely to be estimates.
  - This compares to the average mileage driven by households in England with at least one vehicle is 7,800 miles (National Travel Survey, 2017)<sup>4</sup> indicating that car club members drive almost 20% less distance compared to an average England resident that owns a private vehicle (based on the data provided by members).
- This average change is derived from estimated changes in mileage provided by the 27% of long-term members who reported a decrease in their mileage after joining a car club, the 18% who reported an increase and the 45% of members who reported no change. The average change in annual mileage was a decrease of 793 miles annually.
  - The estimated average annual mileage travelled by members by private car is 5,589 miles. When added to the estimated miles travelled in car club cars, the annual average is 6,403 miles.

<sup>4</sup>[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/729452/nts0901.ods](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/729452/nts0901.ods)

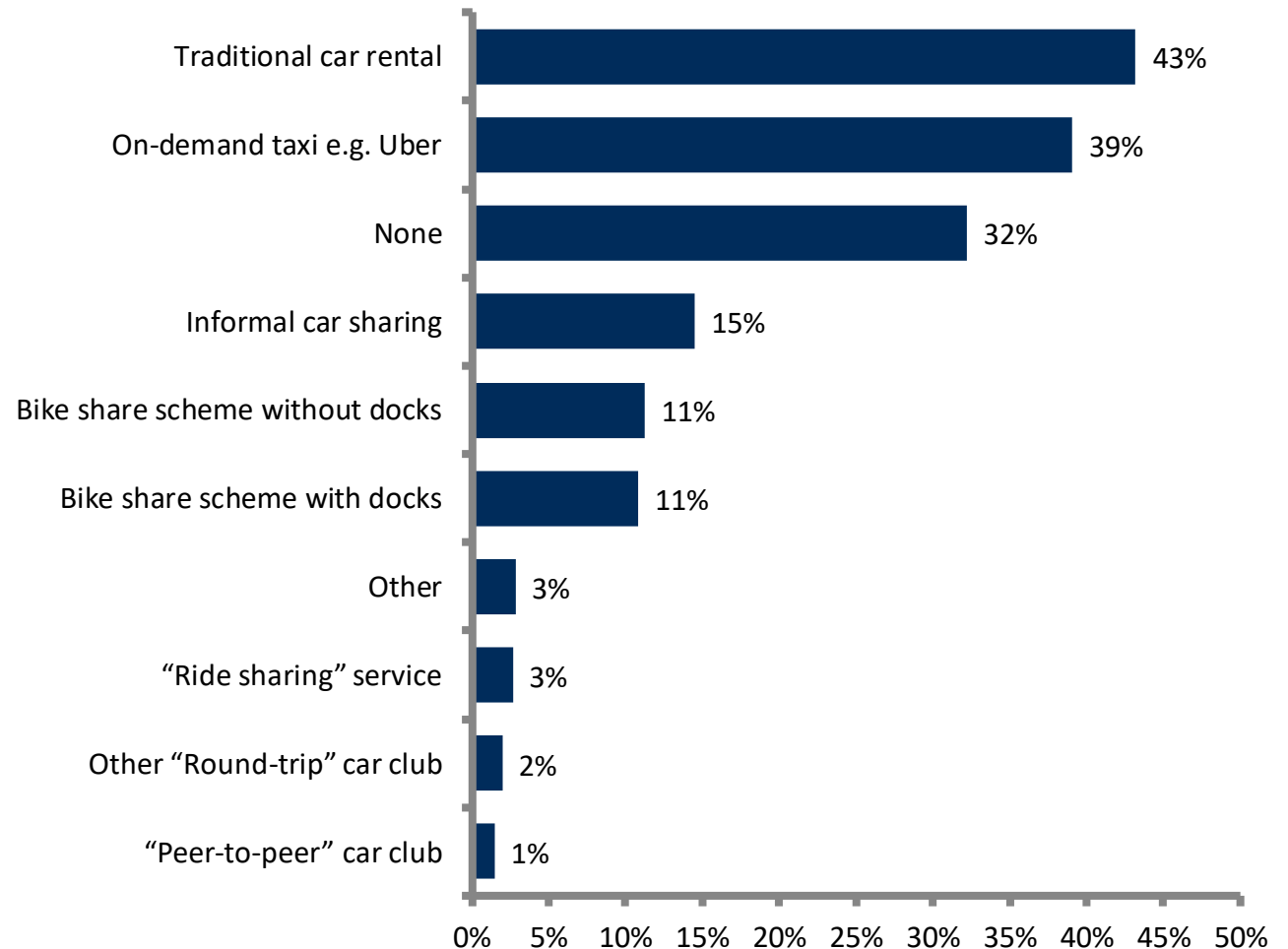
Average change for long-term members



## 2.8 Use of other shared mobility

### Car club members also use other shared mobility services

- 68% of members use another shared mobility service alongside their car club reflecting the growth in the shared economy.
- Aside from car clubs, 43% have used traditional car rental, 39% have used on-demand taxis and 15% have used informal car sharing.
- 11% of members used a bike share scheme without docks and another 11% used a scheme with docks.
- Less than 5% used a ride sharing service or another car club





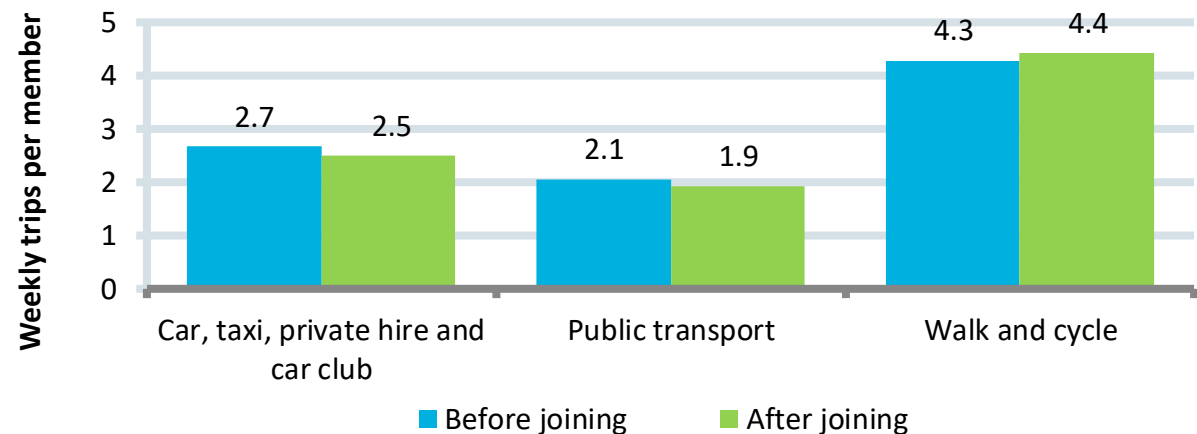
## 2.9 Impact of joining a car club on total members' travel behaviour

### Members travel by car less after joining

- The survey shows a reduction in travel by new members of car clubs (those who have joined in the last 12 months) for both car travel and public transport. In comparison daily trips by all modes across England have increased by 2% from 2016 to 2017<sup>5</sup>.
- After joining a car club, new members reduce their car use. Car club members have reduced their car use by 9% from 2.7 car trips per week to 2.5 car trips per week.
- For the first year public transport use has also declined by 9% from 2.1 trips per week to 1.9 trips per week. However use of public transport by car club members is still much higher than the average resident in England.
- As a comparison across England and Wales between 2016/17 and 2017/18 rail passenger journeys decreased by 1.3%<sup>5</sup> and bus journeys in England (outside London) decreased by 3.1%<sup>6</sup>.

<sup>5</sup>:<https://www.gov.uk/government/statistical-data-sets/rai01-length-of-route-distance-travelled-age-of-stock>

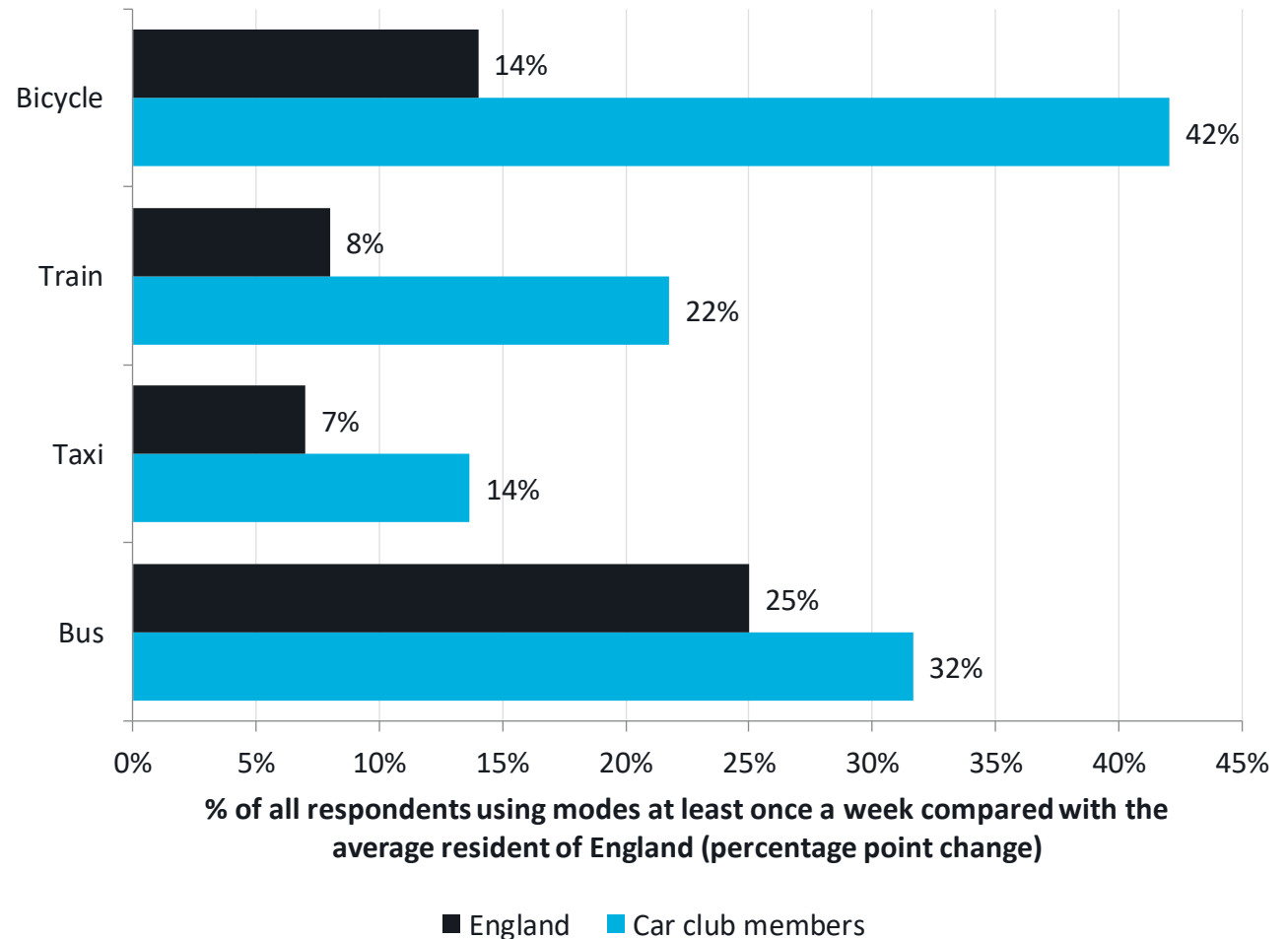
<sup>6</sup>:<https://www.gov.uk/government/statistical-data-sets/bus01-local-bus-passenger-journeys>



## 2.10 Travel behaviour of all members

Members were asked how often they travel by each mode and the results show that they make more use of sustainable modes of transport and less use of private cars than the average resident of England in which the car clubs operate, based on NTS 2017<sup>7</sup>.

- 34% never travel by private car as driver;
- 22% travel by train at least once a week compared to 8% of the average population;
- 42% travel by bicycle at least once a week compared to the average in England of 14%; and
- 32% travel by bus at least once a week compared with the England average of 25%.

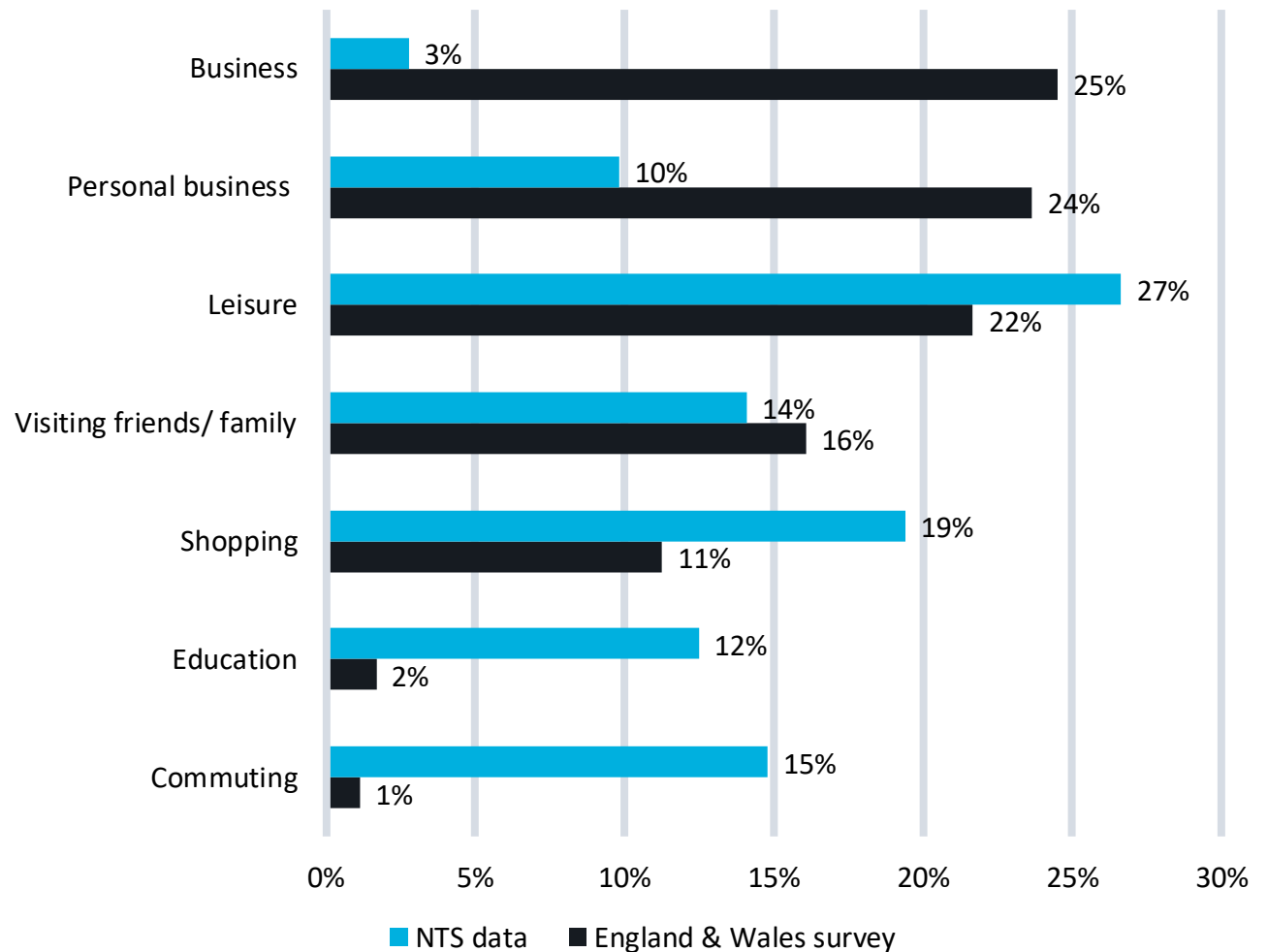


<sup>7</sup>:[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/61111/nts0313.xls](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/61111/nts0313.xls)

## 2.11 How car club vehicles are used

### Car clubs are mostly used for business and leisure purposes

- Car club cars have an average occupancy of 1.7 people (based on the last car club journey made). This is higher than 1.55 for private cars in England (NTS, 2017/2018)<sup>8</sup>. This may be a reflection of the different journey types as detailed below.
- As shown in the chart below, business (25%), personal business (24%) and leisure (22%) are the most popular car club journey purposes. Respondents could choose more than one journey purpose for this question.
- Only 1% of journeys are for commuting compared to the England & Wales average of 15%<sup>9,10</sup>.



<sup>8</sup>:[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/729454/nts0905.ods](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/729454/nts0905.ods)

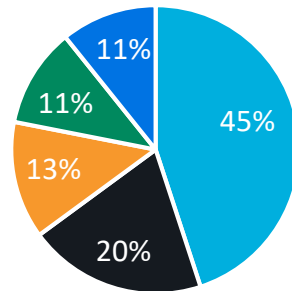
<sup>9</sup>:[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/35608/nts0403.xls](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/35608/nts0403.xls)

<sup>10</sup>:<https://gov.wales/docs/statistics/2013/131128-personal-travel-2012-en.pdf>

## 2.12 Why car clubs are used

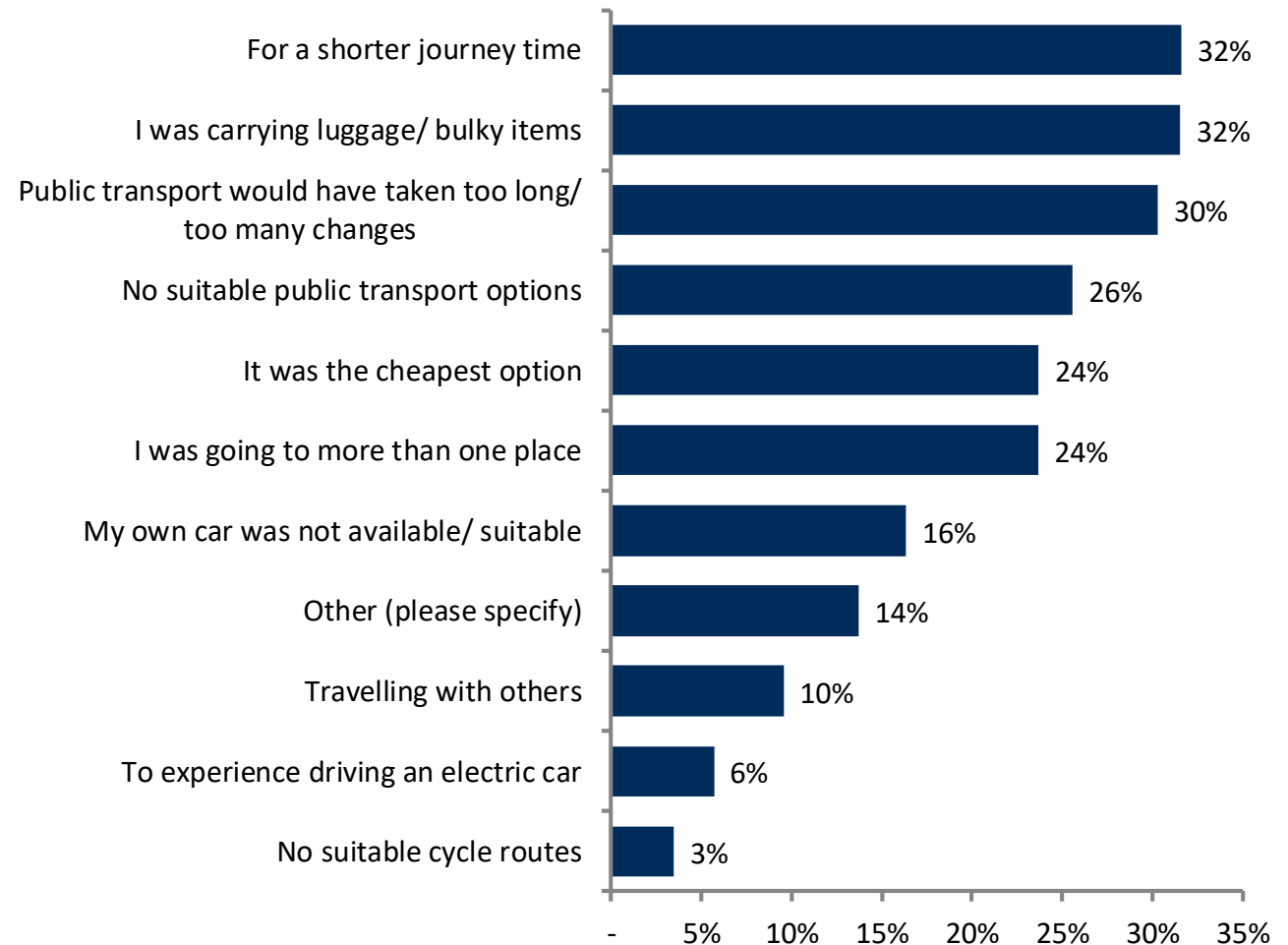
Almost half of all members have made a car club journey in the last month

- In the last month
- In the last three months
- More than six months ago
- Have not yet made a journey
- Between three and six months ago



### Members use car clubs for convenience

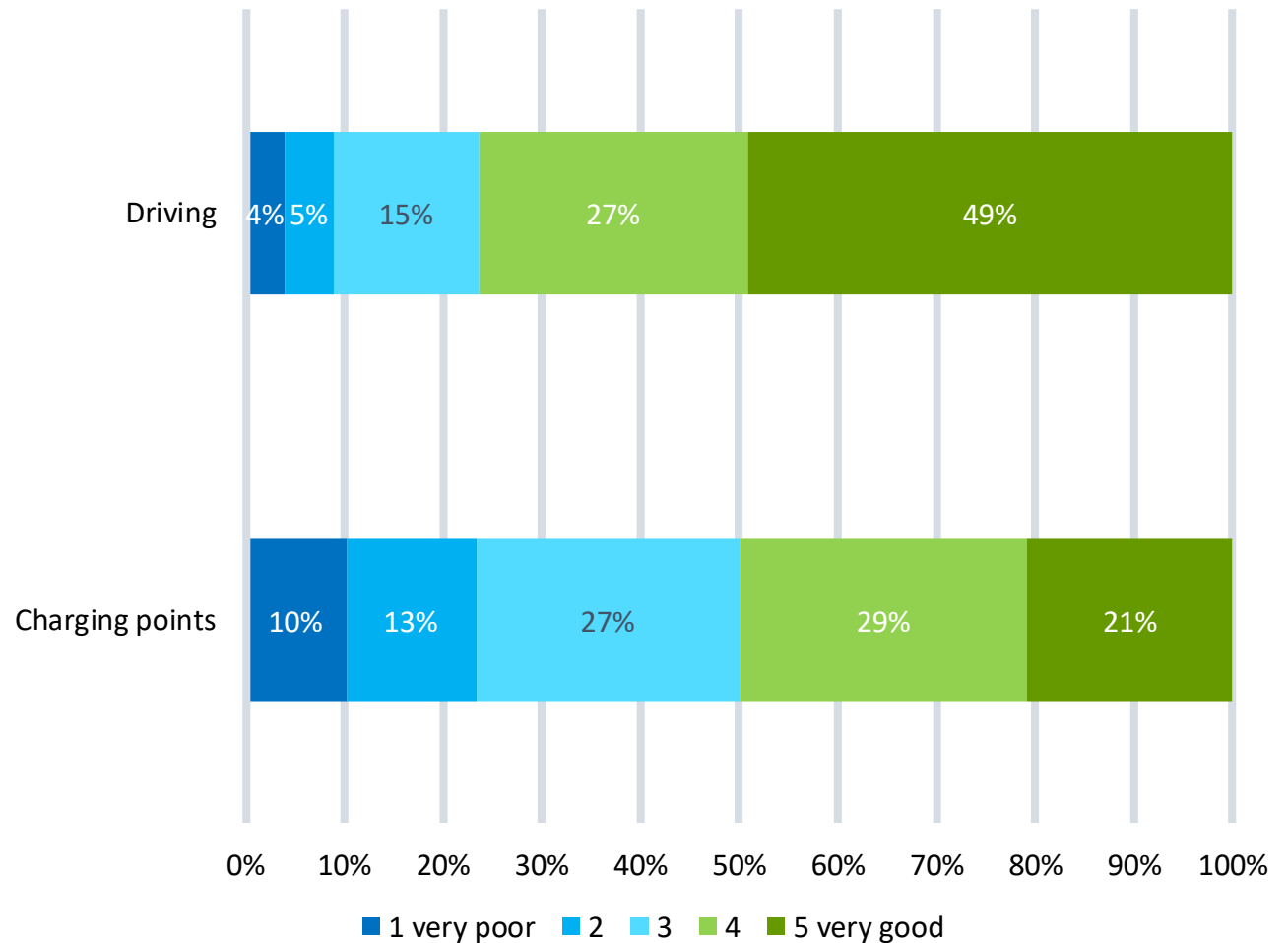
- When asked why they chose to use a car club most recently, the two most popular answers were that respondents wanted a reduced journey time or were carrying luggage/bulky items (32%) which made driving the most convenient option. Similarly, the third most popular answer focused on the lack of convenience/existence of public transport links.



## 2.13 Experiences of using electric vehicles

### Almost a fifth of respondents have tried an electric vehicle

- 34% of all respondents have used a car club electric vehicle.
- As shown in the chart below, 76% rated the experience of driving the vehicle 'good' or 'very good'.
- Members were less satisfied with the experience of using EV charging points with just half rating the experience 'good' or 'very good'. Those who rated the charging points 'poor' or 'very poor' noted problems relating to previous users failing to correctly activate the charging point and therefore the car not having charge when picked up, the lack of charging points and the difficulty in locating them.





# 3 Emissions & fleet profiling

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## 3.1 Introduction

This section analyses the car club fleet of Co-wheels, E-Car and Enterprise Car Club. Each operator provided details on the cars in their fleet accessible by public members (this does not include vehicles used by corporate members). This included the registration number, make and model, fuel type, annual mileage and location.

We used this information to conduct safety and emissions analysis of the car club fleet using data from the DVLA (Driver and Vehicle Licensing Agency), VCA (Vehicle Certification Agency), NCAP (New Car Assessment Programme) and vehicle manufacturers.



783

CAR CLUB CARS



6.1

PRIVATE CARS ARE  
DISPLACED BY  
EACH CLUB CAR



43%

LESS CO<sub>2</sub> FROM  
TAILPIPE EMISSIONS  
COMPARED TO THE  
AVERAGE UK CAR



364 t

CARBON  
SAVING



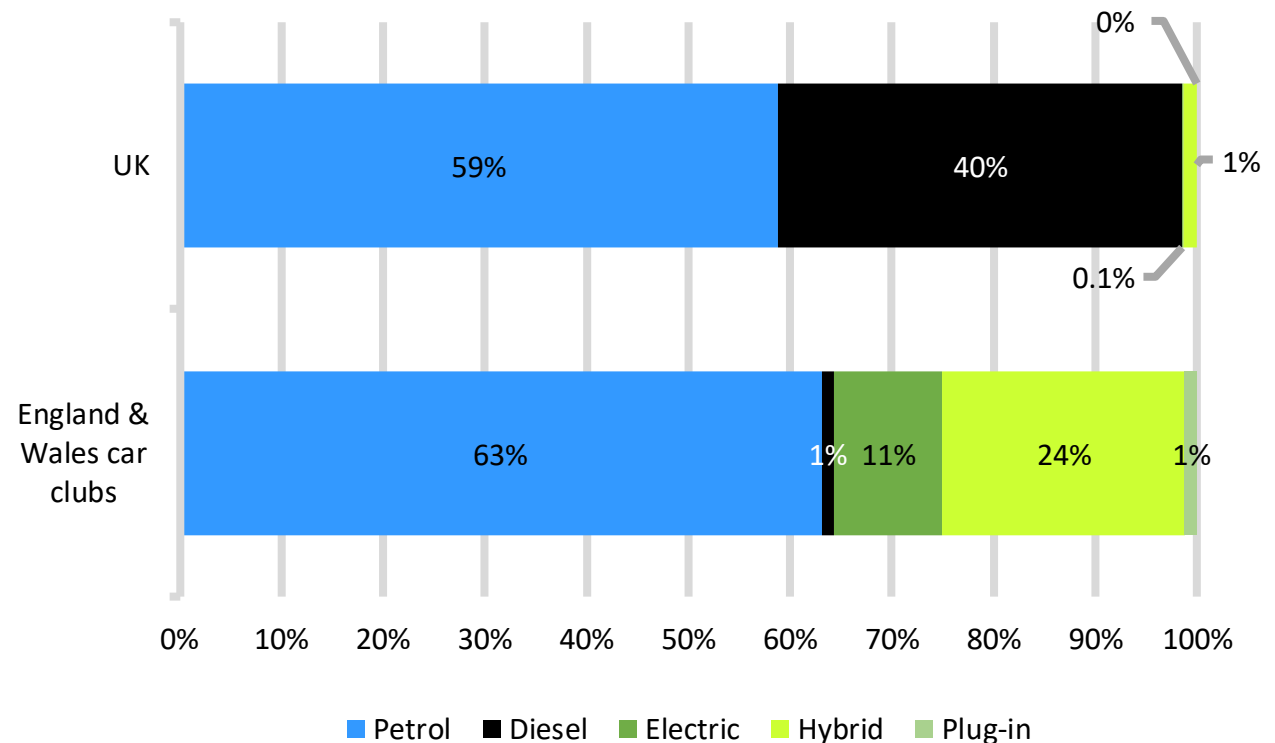
36%

ELECTRIC OR  
HYBRID VEHICLES

## 3.2 Vehicles available and fuel type

### The England & Wales car club fleet is cleaner than the UK private fleet<sup>11</sup>

- The total car fleet size of the three operators surveyed was 783, servicing the 25,773 members.
- 36% of the England & Wales car club fleet is electric, plug-in hybrid or hybrid. Of the total mileage, 31% was made by electric or hybrid vehicles. This shows that these vehicles are typically used less or for shorter journeys.
- Only 1% of the car club fleet was diesel powered compared to 40% of the UK cars.
- 24% of the cars (191 cars) were Ultra Low Emission Vehicles (ULEVs), with emissions of 75g/km or less (including the 11% pure electric vehicles).



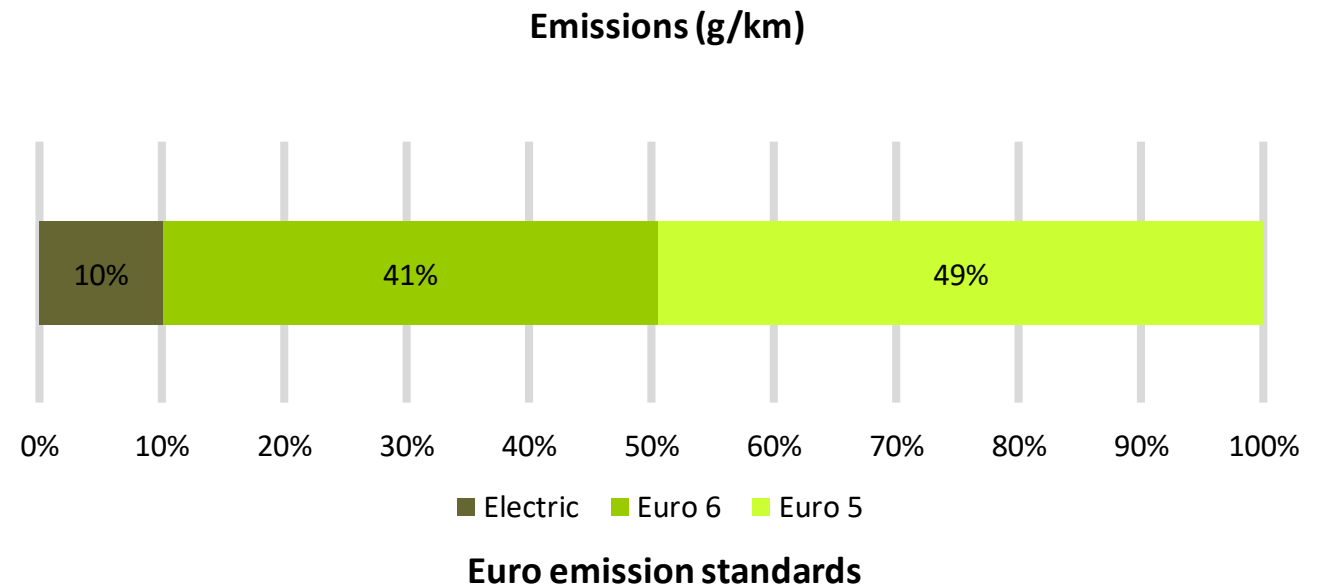
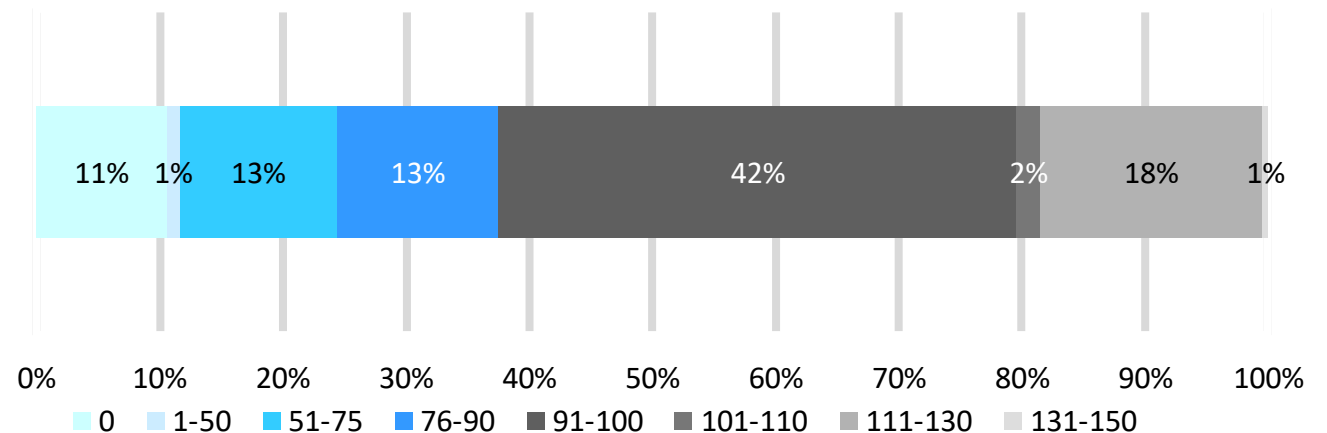
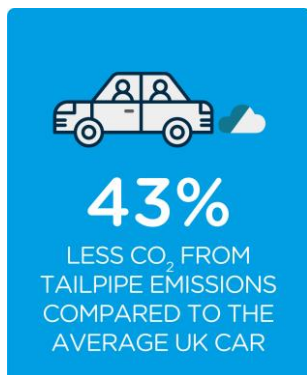
Vehicle fuel type - UK fleet

<sup>11</sup>:Data for the UK Fleet: *United Kingdom, 2017*  
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/794474/veh0203.ods](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/794474/veh0203.ods)

### 3.3 Carbon emissions

A total of 4.5 million miles (7.2 million km) were driven in fuel efficient cars, giving a carbon savings of 364 tonnes.

- The average car club carbon tailpipe emission was 85.4g/km, which is 3% lower than last year (December 2015 to November 2016) and 43% lower than the average UK car<sup>12</sup> (149.6g/km). This results to a saving of 364 tonnes over the year.
- Car club cars score well on Euro emission standards. 41% of car club cars achieved a Euro 6 rating, 49% achieved a Euro 5 rating and 10% of the cars are electric.
- 80% of the car club fleet have less than 100g/km of carbon emissions.

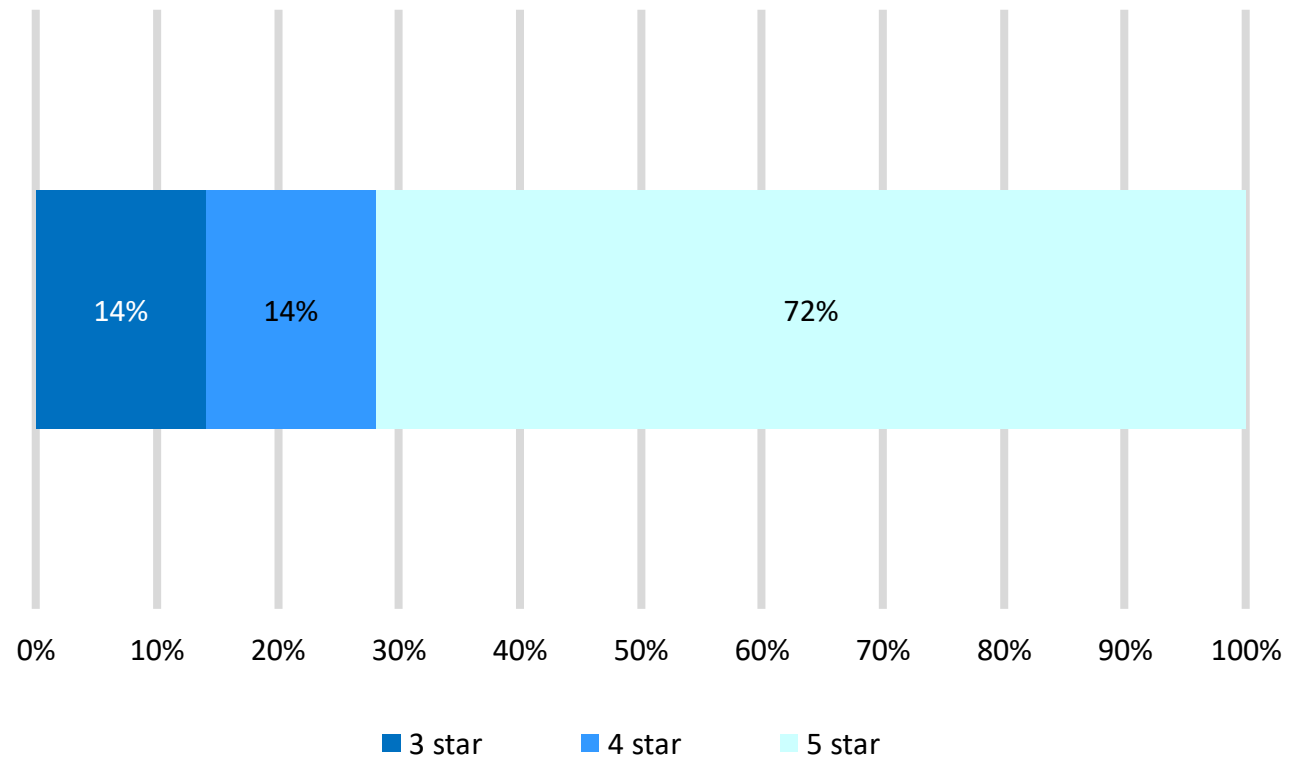


<sup>12</sup>:[www.smmmt.co.uk/wp-content/uploads/sites/2/SMMT-New-Car-Co2-Report-2018-artwork.pdf](http://www.smmmt.co.uk/wp-content/uploads/sites/2/SMMT-New-Car-Co2-Report-2018-artwork.pdf)

### 3.4 Safety rating

The large proportion of car club cars meet high safety standards.

- 72% of the car club fleet has achieved 5-star rating, up from 68% the year before.
- 86% of the England & Wales car club fleet has achieved the NCAP 4 or 5 Star safety standard.



NCAP profile of the England & Wales car club fleet



## 4 Operator survey

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## 4.1 Introduction

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This section contains the information provided by car club operators about their service. Each car club operator has provided details of their vehicle fleet, membership numbers and characteristics of members and data regarding use of car clubs by their members such as mileage travelled. The data was collected across the England and Wales fleet by means of a self-completion questionnaire.

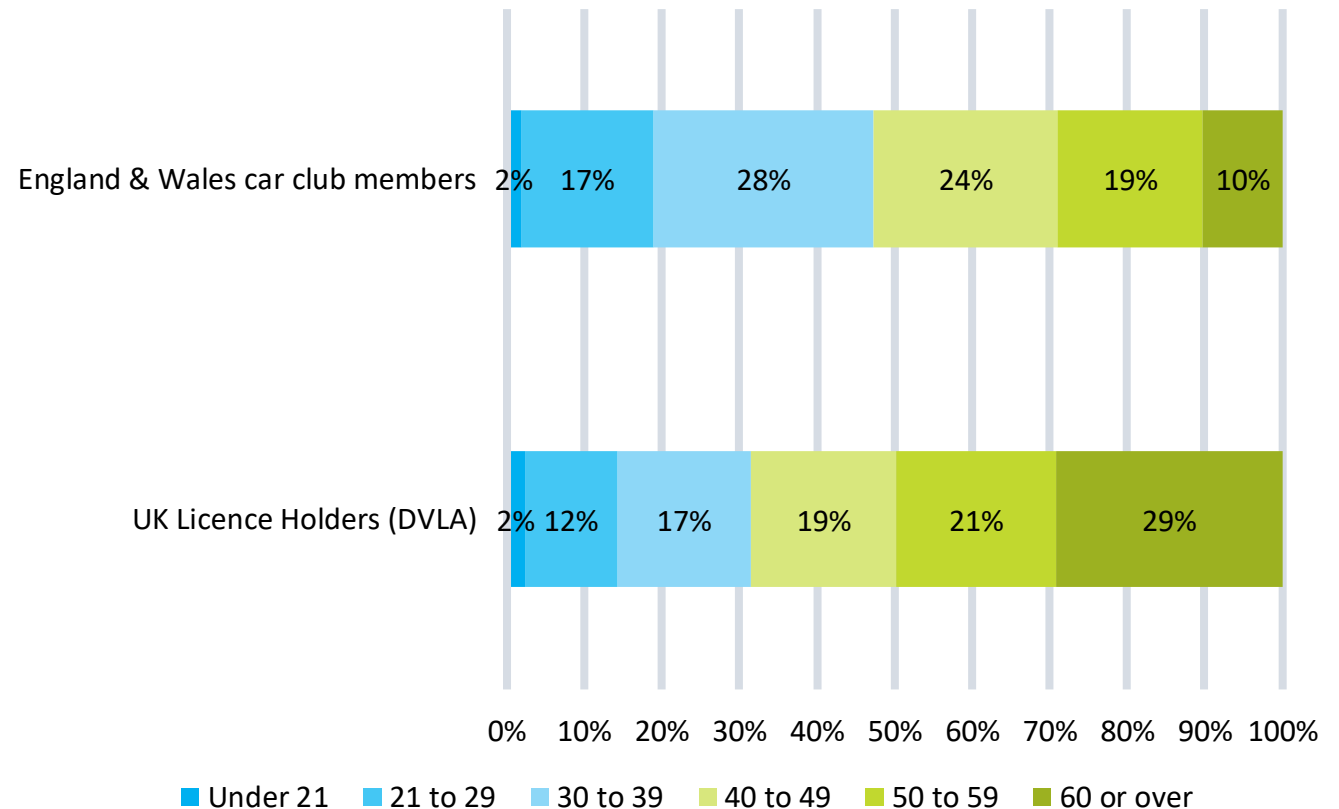
Data was provided by three round-trip car clubs (Co-wheels, E-Car and Enterprise Car Club) with a combined membership of 25,773.

**Data regarding fleet emissions from car club vehicles were collected separately through the emissions analysis and profiling process and were reported in Section 3.**

## 4.2 Characteristics of car club members

### Car clubs attract a young profile of members

- The chart below shows that 71% of England & Wales car club members are under 50, compared to 50% of UK driving licence holders<sup>13</sup>. The key age range for car club membership is predominantly amongst the 30-44 age group.

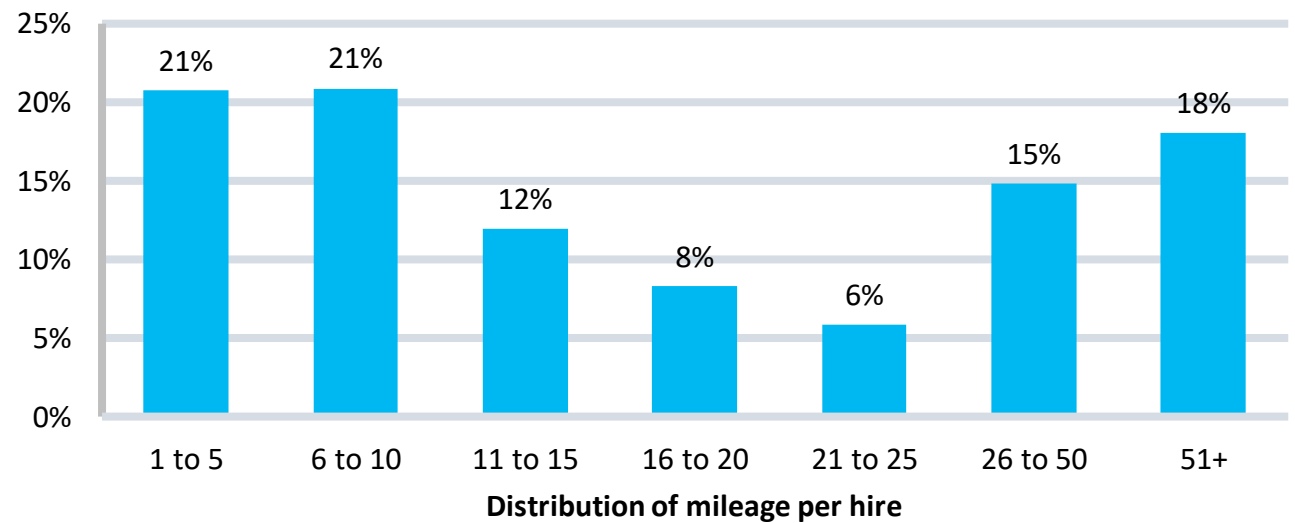
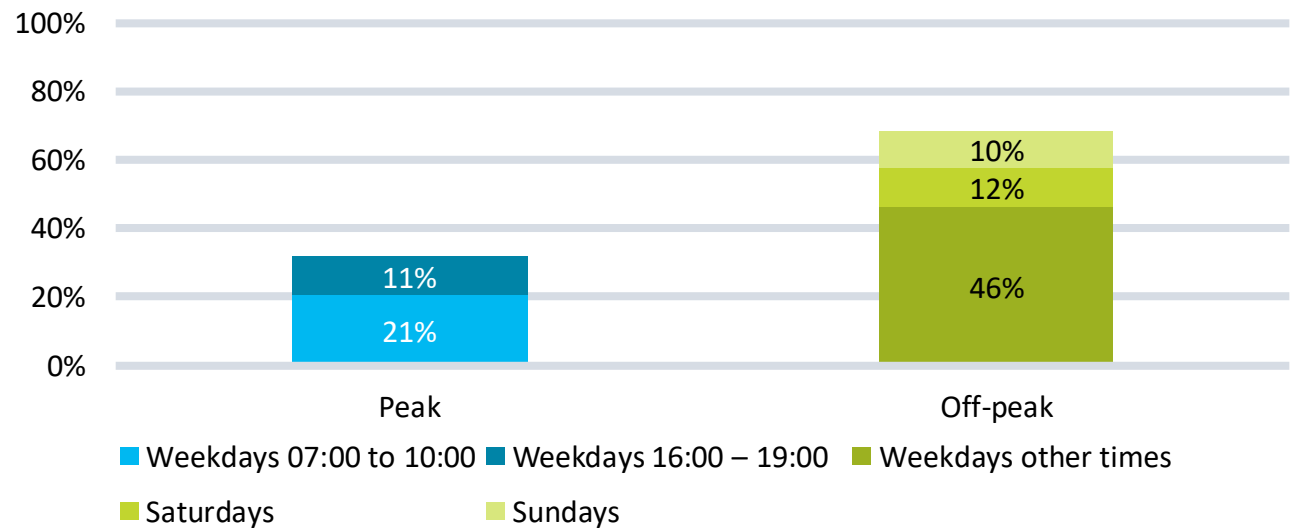
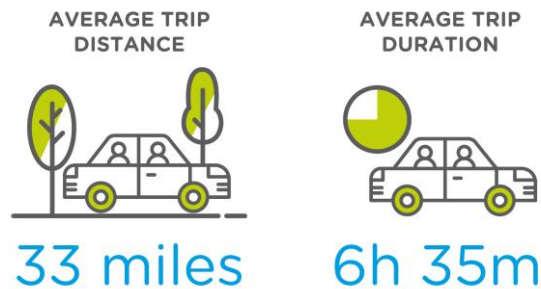


<sup>13</sup>: <http://data.dft.gov.uk/driving-licence-data/Driving-Licence-data-Nov2018.xlsx>

## 4.3 When car clubs are used and hiring characteristics

### Most car club journeys are made off-peak

- 40% of car club bookings start during weekday peak times as shown in the chart below.
- The rest 60% of bookings start during off-peak weekday times or at weekends with two fifths starting on weekdays outside of peak hours, 12% starting on Saturdays and 10% starting on Sundays.



## Contact information

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