

Car Club Annual Survey for Scotland

Key Findings

Car clubs provide an efficient way for members to share cars instead of owning them. Car clubs in Scotland are experiencing significant growth in the last year both in terms of members and fleet. They can provide social, environmental and financial benefits to the communities where they operate.

CAR CLUB MEMBERS



19,872

Up from 13,906
last year

CAR CLUB ACTIVE MEMBERS



12,215

Members are considered
active if they made at
least one trip in the
year surveyed

ANNUAL TRIPS PER MEMBER



35%

Increase in trips
from last year

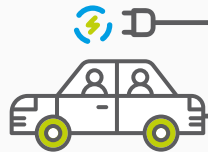
CAR CLUB VEHICLES



544

Up from 411
last year

ELECTRIC OR HYBRID VEHICLES



48%

Up from 36%
last year

CARBON SAVING



490 t

Up from 300 t
last year

This is the twelfth edition of the Car Club Annual Survey for Scotland. It covers the period December 2017 – December 2018. It has been administered by consultants from Steer on behalf of CoMoUK with input and contributions from commercial and community operators.



CoMoUK is committed to a standardised data collection system to assess the impacts of car clubs and inform the development of the car club market. Since 2007, CoMoUK (formerly Carplus) has worked with car club operators to collect a range of data on the characteristics of their members and details on their fleet.

Methodology

This report summarises member and fleet information collected from the car club operators. This year rather than carrying out a survey of members we have included a new area of focus in the report exploring the growing peer-to-peer and ride share market in Scotland.

To better understand the peer-to-peer and ride share market we have engaged with operators in both sectors who have a presence in Scotland as part of this study.



Car Clubs

Car clubs can provide social, environmental and financial benefits for communities, as they:

- Facilitate lower levels of car ownership and encourage travel by public transport, walking and cycling.
- Improve local air quality by using more environmentally friendly cars, which have significantly lower tailpipe emissions than the average UK car.
- Use mostly new cars; 79% of the car club cars achieved Euro 6 rating on the euro emission standards.
- Improve car safety, as 84% achieved NCAP 4 or 5 rating.

The Car Club Annual Survey for Scotland was completed by three commercial car club operators (Co-wheels, E-Car and Enterprise Car Club), along with several community car clubs. Overall, these car clubs have a fleet of 544 cars and 19,872 members in Scotland, 12,215 of which were active members (have rented a car at least once in the year surveyed).

In the last year:

- Members have increased by 40%
- Vehicles have increased by 26%
- Number of trips has increased by 35%

MEMBERS



40%

Increase in members
from last year

CAR CLUB ACTIVE MEMBERS



26%

Increase in
active members
from last year

ANNUAL TRIPS PER MEMBER



35%

Increase in trips
from last year

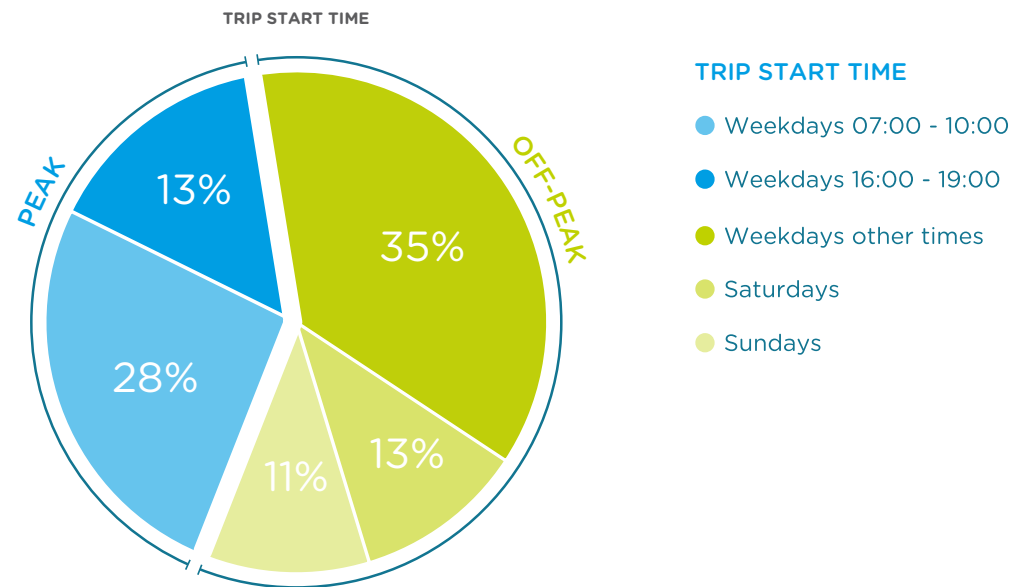
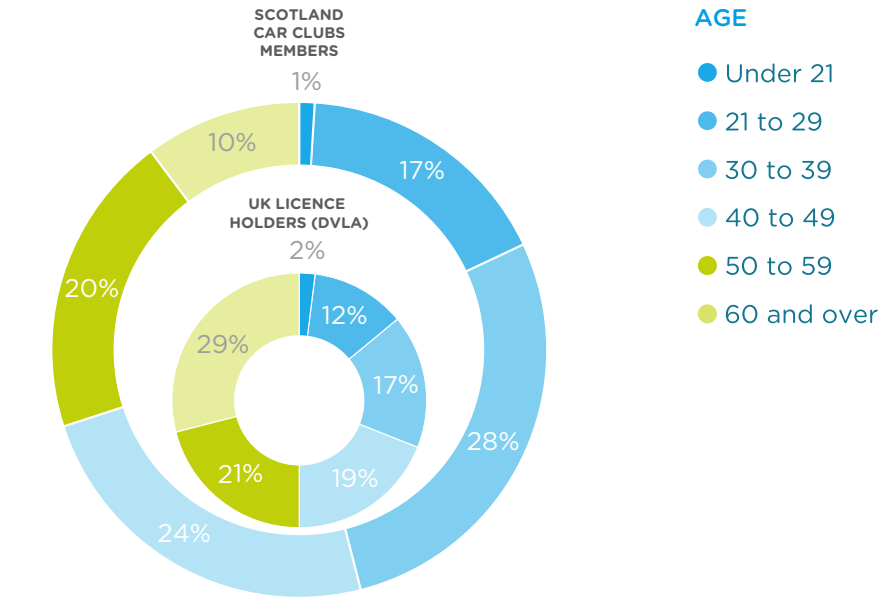
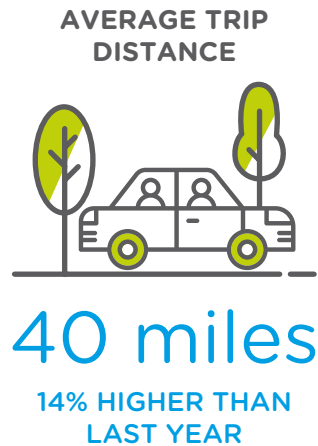
Car Club Member and Trip Characteristics

This year's survey found that the number of car club trips increased by 35% since last year, which is similar to the increase in membership.

On average, each active member is making fewer trips than last year, but the average trip distance has increased by 14% to 40 miles.

Since last year, the percentage share of trips starting during peak-time has increased, however the majority of journeys are still starting during off-peak times.

Car clubs attract a younger profile of members with 70% percent being aged under 50, compared to 50% of UK licence holders. This may support the idea that younger people are less likely to own a car.



Car Club Fleet

Commercial car clubs tend to replace their cars every 3-4 years. This is part of the criteria for achieving CoMoUK accreditation which helps to ensure car clubs, and their vehicles, provide the best service for its members. By having a newer fleet of vehicles, this means the cars meet the highest safety and emissions standards.

83% of the car club fleet in Scotland have NCAP 4 or 5 safety rating, 79% meet the Euro 6 emission standard, and 14% are electric.

This year, the share of low/zero emission vehicles has increased, with 87% of the fleet having less than 100g/km of carbon tailpipe emissions. The average carbon tailpipe emission was 78g/km, making it 48% lower than the average UK car.

A total of 4.2 million miles were driven by car club cars in Scotland in the last year. By making these journeys in a car club vehicle rather than an average UK car (149.6 g/km), 490 tonnes of CO₂ were saved.



ELECTRIC OR HYBRID VEHICLES



48%

Up from 36% last year

CARBON SAVING



490 t

Up from 300 last year

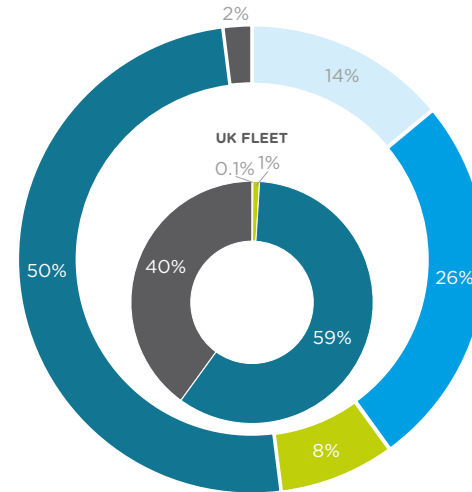
CARBON EMISSIONS



48%

Less CO₂ from tailpipe emissions compared to the average UK car

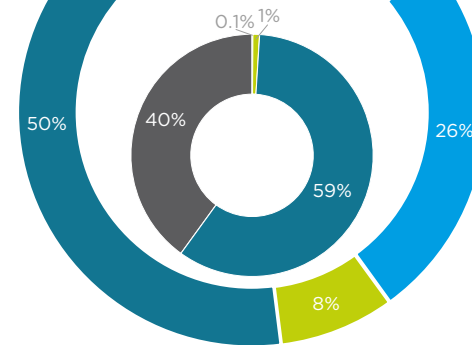
SCOTLAND CAR CLUBS



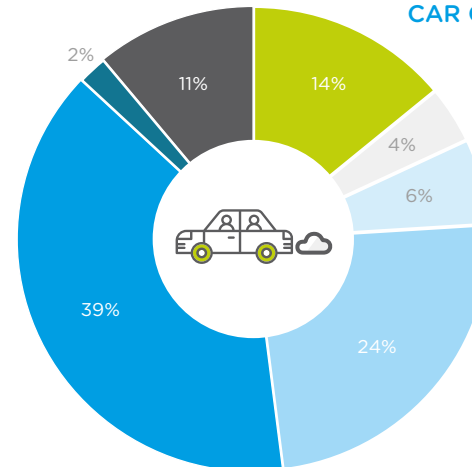
VEHICLE FUEL TYPE

- Electric
- Plug-in Hybrid
- Hybrid
- Petrol
- Diesel

UK FLEET



CAR CLUB CO₂ EMISSIONS (g/km)



- 0
- 1-50
- 51-75
- 76-90
- 91-100
- 101-110
- 111-130

Peer-to-Peer Car Clubs

The peer-to-peer car club market has evolved in recent years, with a number of new operators launching, offering privately owned cars as car club cars through peer-to-peer platforms. To better understand the peer-to-peer market we have engaged with peer-to-peer car club operators who have a presence in Scotland as part of this study.

As this is an emerging market, the quantitative data that is available is limited. We have therefore focused on understanding how the operators currently operate and their views on the potential opportunities and enablers that they see for growth in Scotland.

Operator	HIYACAR	TURO	DRIVY
	YES	YES	YES
UK presence	London focus	London and Manchester focus	London focus
Scottish presence	LIMITED	LIMITED	LIMITED
Interest in Scottish market in partnership with government	YES	YES	YES

Summary of Findings

The operators are currently focused on securing growth in London, before expanding into other UK cities.

All operators have vehicles and members in Scotland without actively marketing.

When considering which other UK cities to expand into, cities in Scotland show good potential.

Suggested enablers for growth were mostly around increasing the public awareness and incentives for car sharing and offering parking permits to help with the initial introduction of the service.



EVOLVING PEER-TO-PEER MARKET

Ride Share

The ride share market has been slowly growing in Scotland for several years. This market serves both long and short trips, and matches people looking to make a trip with drivers already going the same way. The operators we spoke with target different users and trips ranging from regular commute trips to travel to events and festivals.

This market is made up of a combination of different business models which record their users in different ways. This means that the quantitative data that is available is often not comparable between operators. We have therefore focused on understanding how the operators currently operate and their views on the potential opportunities and enablers that they see for growth in Scotland.

Operator	LIFTSHARE	GOCARSHARE
UK presence	YES	YES
Scottish presence	YES	LIMITED
Interest in Scottish market in partnership with government	YES	YES



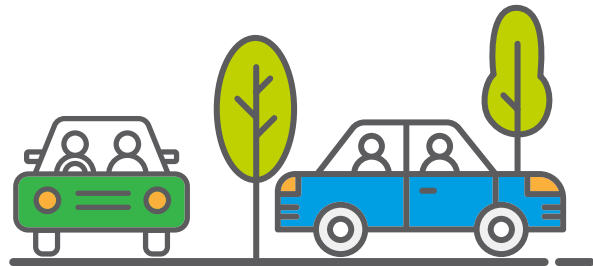
Who is CoMoUK?

CoMoUK is a charity working to improve transport choices to help create inclusive communities, healthy people and a greener environment.

We know most people use their own cars to get around. At CoMoUK we want to shake up peoples' choices of how they travel. We look at shared transport, such as car clubs or bike share, as part of the solution to environmental impacts of travel.

In addition, there are people within communities who are isolated due to lack of access to transport, and shared transport can be a lifeline to these people.

CoMoUK supports all modes of shared transport including car clubs, bike share and micro-transit. Shared transport is continually evolving and innovating; we want to support and ensure that new modes of transport work positively for the public.



What we do?

CoMoUK works in various ways to raise awareness and move shared transport forwards. Some of the ways we do this are;

- CoMoUK acts as an advocate for shared transport. We work with a variety of partners with shared goals to increase the reach and strength of our advocacy.
- We carry out annual surveys with car club and bike share users to find out their thoughts and feelings on the services. Where possible we try to encourage improvements to be made to shared transport options.
- Gather data from operators such as number of members, number of cars and usage. This allows us to analyse the sector, identify growth areas and see trends.
- Create and share guides on best practice for the development of shared transport. These guides can be used by those who want to set-up bike share or car clubs in their local area.
- We work as a consultancy with local authorities, transport authorities and community groups to set-up and develop shared transport schemes.
- Deliver pioneering projects to help ensure that the social and environmental benefits of shared transport are maximised.
- CoMoUK is an accreditation body for car clubs and bike share in the UK to ensure that users receive the best service.

Our team

At CoMoUK we are proud of our team of experts. We have several members of staff who are experts in specific shared transport options such as car clubs or bike share. In addition, there are team members who can help with marketing, project management and research. All of this ensures that we can offer the best support and advice across shared transport.

Why we do it?

CoMoUK believes that now is the time that we can start making positive changes to transport. Politicians, local authorities and other decision makers have acknowledged the need for change and we want to be there to support these positive and innovative transport changes.

Get in touch

If you are interested in learning more about shared transport or think that shared transport could work for you then don't hesitate to get in touch and we will be happy to help you.

Email: Scotland@como.org.uk

Web: www.como.org.uk

Twitter: [@Como_uk](https://twitter.com/Como_uk)

