

# CoMoUK Annual Car Club Report

SCOTLAND

2022



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## CAR CLUB MEMBERS



**45,995 members**

↑ 21% (2021 = 37,993 members)

## FLEET SIZE



**548 vehicles**

↓ -4% (2021 = 567 vehicles)

### LOW CAR LIFESTYLES



**73%**

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

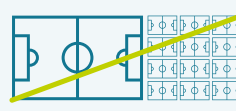
### REDUCING PRIVATE CAR OWNERSHIP



**15**

In 2022, on average, each car club vehicle in Scotland displaced 15 private cars

### FREEING UP PUBLIC SPACE



**13**

Land equivalent to 13 football pitches, or 9 hectares, was freed up across Scotland by the car reduction due to car clubs

### REDUCING CAR MILEAGE



**180 miles**

Car club members in Scotland drive 180 miles less per year since joining the car club

### CAR CLUBS ARE A USEFUL TOOL FOR TRIPS WHICH CAN'T BE DONE BY OTHER MODES



**41%**

of respondents said there were no suitable public transport or active travel options



**39%**

of respondents said they used the service for carrying bulky items



**46%**

of respondents said they would have used another form of car such as taxi or car hire if the car club wasn't available

### ACCESS TO OPPORTUNITIES



**27%**

of car club members used car clubs for journeys that they wouldn't have been able to make otherwise

### SUSTAINABLE TRAVEL CO-BENEFITS



**32%**

of car club members were using a bicycle at least once a week. On average, in Scotland, 5% cycled for their commute and 6% cycled for pleasure at least once a week before the Covid-19 pandemic



**78%**

of car club members were walking at least once a week for travel (i.e. not for leisure)



**48%**

of respondents were using a bus at least once a week, 15% were using a train or tram at least once a week, compared to a national average of 25% and 9%, respectively



**40%**

of car club members with a constraining health condition wouldn't have been able to make the trip without the car club the last time they used it

## CUSTOMER SATISFACTION BOOSTED



**10%**

User satisfaction with all aspects of car club operation has improved on average by 10 percentage points in the last 12 months



**>80%**

of car club users are satisfied with joining, booking and the condition of vehicles

## COST SAVINGS



**78%**

of car club users who had decreased their car ownership thought that they had saved money compared to owning or leasing a car



**35%**

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

## ELECTRIC CARS



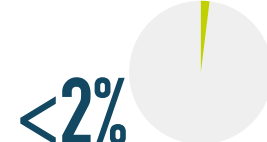
**21%**

of the car club cars in Scotland are electric



**14%**

of the car club cars in the UK are electric



**<2%**

of private cars in the UK are electric



**49%**

of survey respondents had used a fully electric car club vehicle



**91%**



of users were satisfied or very satisfied with driving the electric car club vehicles



**67%**

of users were satisfied or very satisfied with charging electric car club vehicles at the end of a hire



**31%**

of users were satisfied or very satisfied with mid-hire charging of electric car club vehicles

## FUEL TYPE



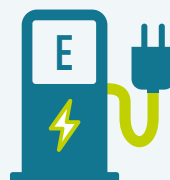
**39%**

Petrol



**30%**

Petrol hybrid



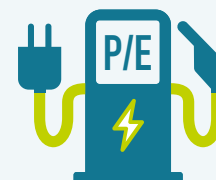
**21%**

Electric



**7%**

Diesel (vans only)



**2%**

Plug-in hybrid

## CLEANER AND SAFER

**<5 YEARS**



**100%**

of cars are under 5 years

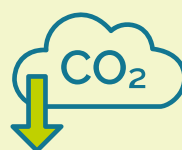
**<2 YEARS**



**36%**

of cars are under 2 years old

## CARBON EMISSIONS



**37%**

lower carbon emissions from car club vehicles in Scotland than the average UK car



**100%**

of Scottish car club cars are compliant with Low Emission Zones

## Foreword

As we find ourselves in the midst of a cost of living crisis, it can be easy to assume that decarbonisation, congestion reduction and transport behaviour change might fall by the wayside for many Scots. However, our 2022 car club report for Scotland shows that economic efficiency and the green transformation of our transport system can go hand in hand. 78% of car club members from our representative sample save money by using car clubs rather than owning or leasing their own car.

At the same time, car club members use cars less and tend to travel much more sustainably: 73% of the members used the scheme between one and five times a year. Quite radical behaviour change is possible when the car is not the easy, on-the-front-drive option; no longer the default, but rather just one, mostly occasional, element in a wider network of transport options.

When considering the Scottish government's ambitious target of reaching a 20% reduction in car kilometres by 2030, the fact that car clubs alone reduce mileage by 5% demonstrates their efficacy in achieving this goal. In addition to that, we find that each car club car in Scotland is displacing 15 private cars. Given the growth car clubs have shown in recent years, by 2030, this contribution to reducing

personal mileage and reduced numbers of cars overall will be even more stark.

The opportunities of car clubs in the radical overhaul of our love affair with the private car, an overhaul which is so desperately needed, must be supported, prioritised and funded at a national, regional and local level. My thanks to the users who contributed, the operators who shared our survey and of course to the CoMoUK team in Scotland for this report and the work they do year round to make promote, grow and strengthen shared transport.

If you're interested in this or any of our work, please get in touch at [scotland@como.org.uk](mailto:scotland@como.org.uk).

**Rachael Murphy**  
Scotland Director, CoMoUK



Co Wheels



## Introduction

This Scottish CoMoUK Car Club Annual Report 2022 presents data collected from car club operators for the period 1 October 2021 to 30 September 2022 alongside data from our car club user survey, collected in Autumn 2022. This research has been carried out by CoMoUK with input and contributions from car club operators, and has been verified by research consultant Dr Sally Cairns.

## Methodology

Over the last 15 years, CoMoUK has collected a 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 operators in Scotland (Enterprise Car Club, Co Wheels, and the car club subsection of Hiyacar).

The data was collected in two parts:

- A car club members' survey, which was completed by 1,534 respondents based in Scotland, of whom 1,236 could be considered 'private users' (as discussed below).
- A car club operators' survey which gathered data on operational vehicle usage.

Unless stated otherwise, the findings from the car club members' survey only include

private users of car club cars. This means that members who only used car club vans, and those who only used the service for business trips, were excluded from the analysis. Corporate members who used car club cars also for private purposes were included. On this basis, 1,236 respondents were included in the analysis.

Respondents could skip any questions in the survey if they so wished, and there was some routing to ensure respondents were directed to the parts of the survey that were directly applicable to them. Consequently, unless otherwise stated, the percentages presented in this report refer to the total number of respondents that answered a particular question. Percentages were rounded to integers, so the sum of percentages for some questions might deviate from 100%.



Hiyacar

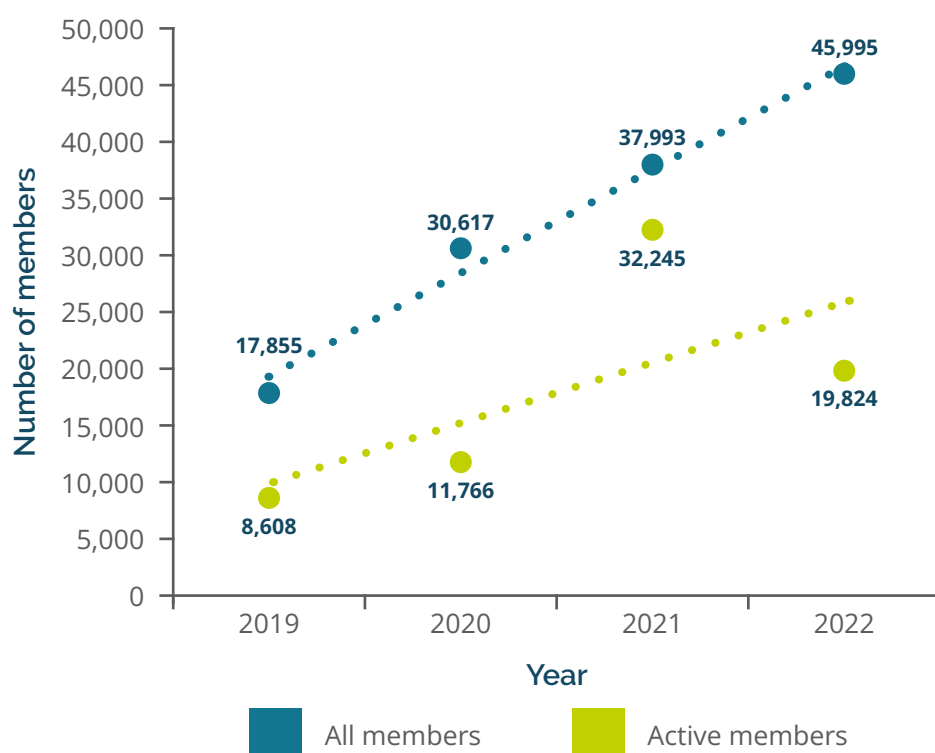
# Car club membership

## Membership growth

According to operator data, membership of car clubs in Scotland is growing steadily, and total membership is now at 45,995 members, a 21% increase over 12 months. The number of active members (i.e., those who have joined, renewed their membership or used a car club vehicle in the last year) amounts to 19,824. This includes 18,173 individual active members and 1,651 corporate active members. While

this is a decrease compared to 2021, the number of active members (individual and corporate) has grown by 130% compared to active membership pre-pandemic (2019).

In 2022, 69% of all car club members were individuals, whilst 31% were corporate memberships. Among active members, 92% were individual members and 8% corporate members.



It is important to note these figures represent total membership numbers, as 11% of survey respondents indicated that they have joined more than one car club. At the same time, some households will have more than one person benefiting from one membership.

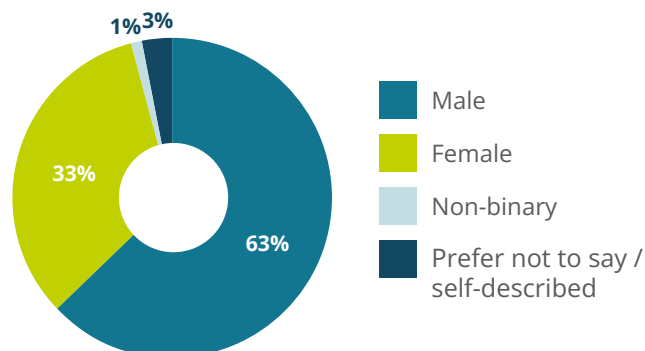
Among individual respondents to the car club survey, 27% stated that they had joined the car club that they use most often in 2022, 18% in 2021, and 10% in 2020. 40% had joined before 2020, whilst 4% stated that they did not remember when they joined.

11% of survey respondents hadn't used the car club in the last 12 months. Among these people, the biggest group of respondents (48%) said they just hadn't needed the service, 30% said that they only were car club members as a back-up. Cost, changes in personal circumstances, and vehicles not being close enough were the other reasons mentioned. Respondents could choose more than one answer to this question.

## Membership demographics

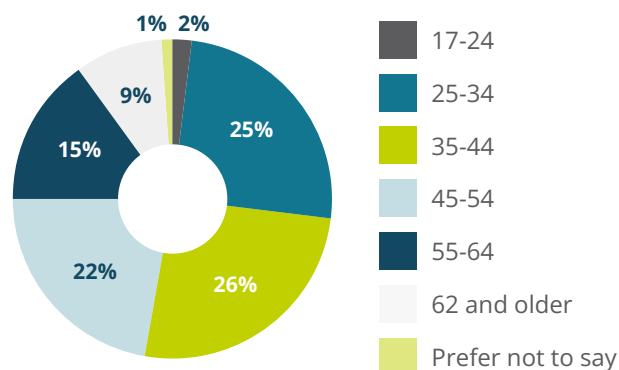
### Gender

63% of respondents to the survey identified as male, whilst 33% identified as female. Those remaining identified as non-binary (1%) or preferred not to answer (3%). This gender gap is also reflected, although to a lesser degree, by the overall population of drivers in Scotland: while 80% of men aged 17 and over hold a driving license, only 72% of women do so.<sup>1</sup>



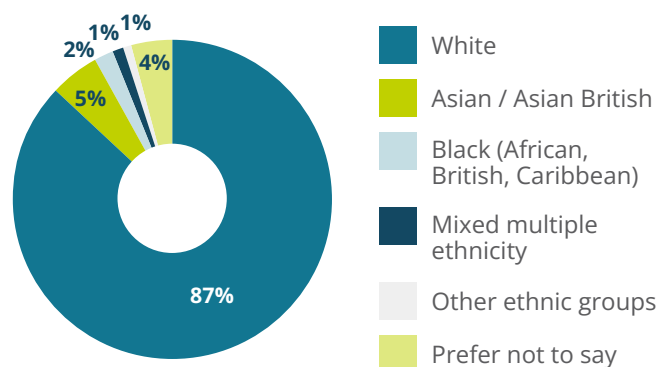
### Age

Operator data indicates the majority of members in Scotland are between 21 and 39. These figures were matched by the survey data (with 1% of respondents indicating 'prefer not to say').



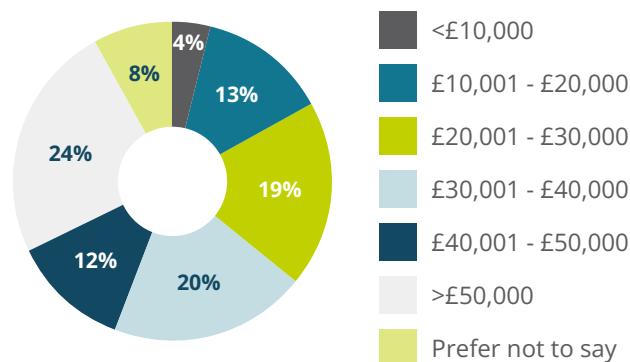
### Ethnicity

In terms of ethnic background, 87% of respondents were white, 5% were Asian, 1% Black and 3% from other ethnic or mixed heritage groups. 4% preferred not to answer this question.



### Income

When asked about personal income levels, there was a spread of responses in Scotland, with 24% of respondents earning over £50,000 and 17% earning under £20,000. In comparison, car club membership is more concentrated in the high income brackets for the whole UK, with 31% earning over £50,000 per year. The percentage of respondents who chose "prefer not to say" was at 8% and 10% for Scotland and the UK, respectively.



Except for the above stated differences, the demographic data for Scottish respondents was very similar to the data for all respondents to the 2022 car club survey in the UK.

<sup>1</sup> <https://www.transport.gov.scot/publication/transport-and-travel-in-scotland-2020-results-from-the-scottish-household-survey-pdf-version/>

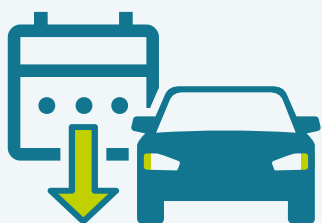
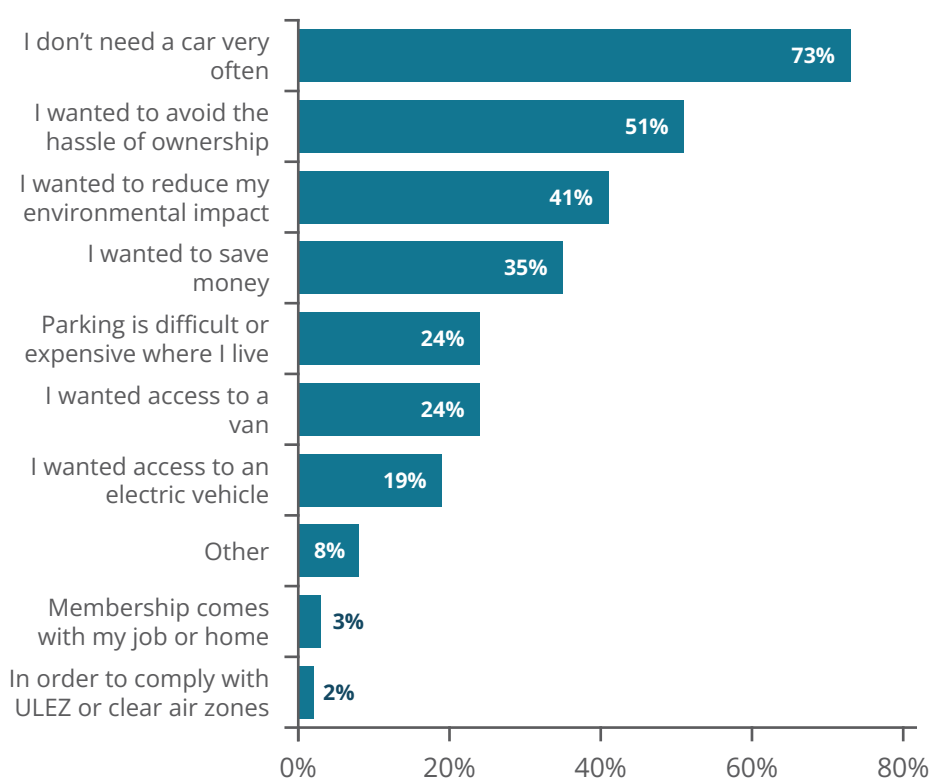


## Motivations and benefits

The survey asked questions about members' motivations for joining a car club (with multiple answer choices possible). The results paint a picture of members who had car-light lifestyles and wished to reduce the costs, the stress, and the environmental footprint of personal car ownership. Almost three quarters of respondents (73%) said they rarely use a car; this is explored further in the sections Trip purpose and Journey profile. The

desire to avoid the hassle of car ownership was the next most popular reason for joining (51%), followed by the aim to reduce one's personal environmental impact (41%). About one third of respondents stated that they wanted to save money; about a quarter wanted to avoid issues with parking in their local area; and about a quarter wanted access to a van. About a fifth (21%) wanted access to an electric vehicle.

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



**73%**

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

*"Dispensing with ownership of a car and opting instead for a combination of active travel, public transport and car club membership has help me achieve a more active and thus healthier lifestyle. Additionally, I can contribute in a small way to reducing the nation's greenhouse gas emissions"*

Male user from Edinburgh, 65-75

## Cost savings

35% of respondents said that saving money was a reason for joining the car club. Of those respondents who said that their household had disposed of a car since joining a car club (20% of the overall sample), 78% agreed that car club membership saves them money compared to owning or leasing a car, with only 3% reporting that it was costing more (and the remainder saying that it was costing the same, or that they didn't know). Of those who had disposed of a car and were able to estimate the change in cost (164 people), 70% estimated that they were saving at least £50 a month.

*"We are fitter and spend less money than when we owned a car."*

Female user from Edinburgh, 45-54

*"The car club is an outstanding way to save money and help the environment by sharing vehicles and only using a car when you really need it."*

Male user from Stirling, 25-34



Strathaven Car Club



**35%**

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



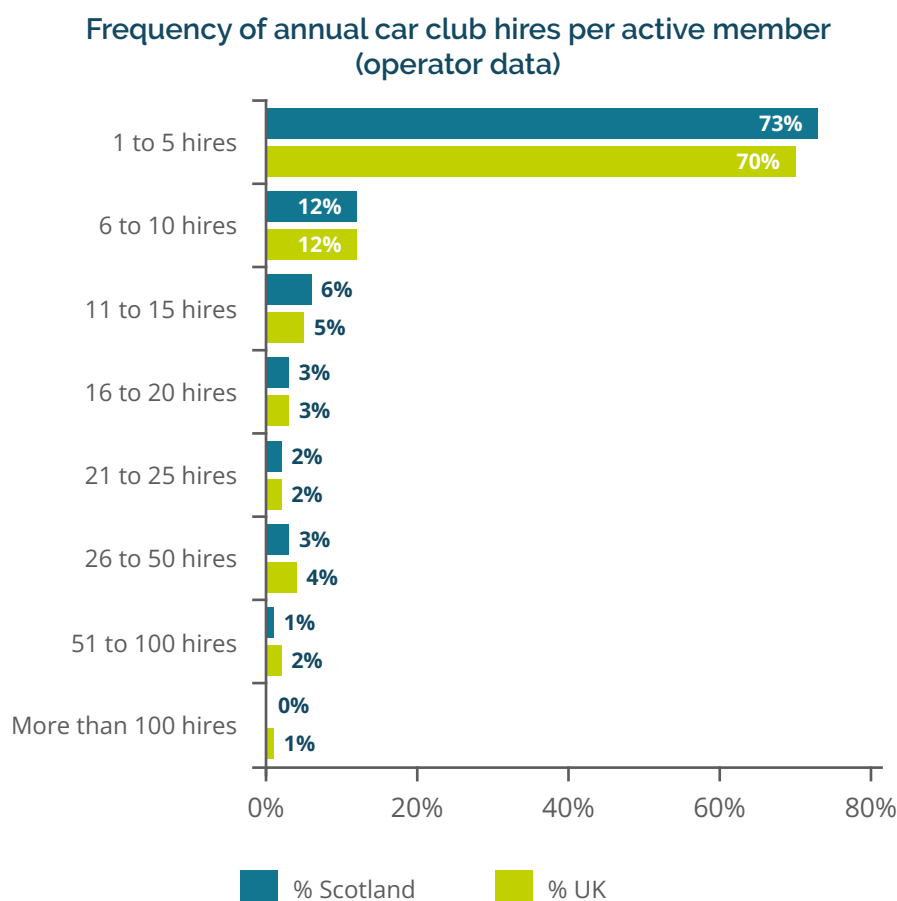
**78%**

of those who had got rid of a car agreed that car club membership saves them money compared to owning or leasing a car

## Trip purpose

Car club members are infrequent drivers. When examining operator data for the period October 2021 to September 2022, almost three quarters (73%) of individual and corporate members in Scotland used

the car club less than 5 times over the year. Another 12% used it between 6 and 10 times per year. This data from Scottish car clubs is very similar to the overall UK data.



*Percentages refer to share of active members (individual and corporate) who hired a car club vehicle for a given number of times between 1 October 2021 and 30 September 2022*

There is also evidence that shows that car club members generally use cars less frequently. When asked how often they were travelling in any kind of car or van (either car club vehicle, private car, taxi or hire car), 48% of respondents stated that they used a car at least once per week before joining a car club, whereas only 37% of respondents stated that they used a car at least once per week after joining.

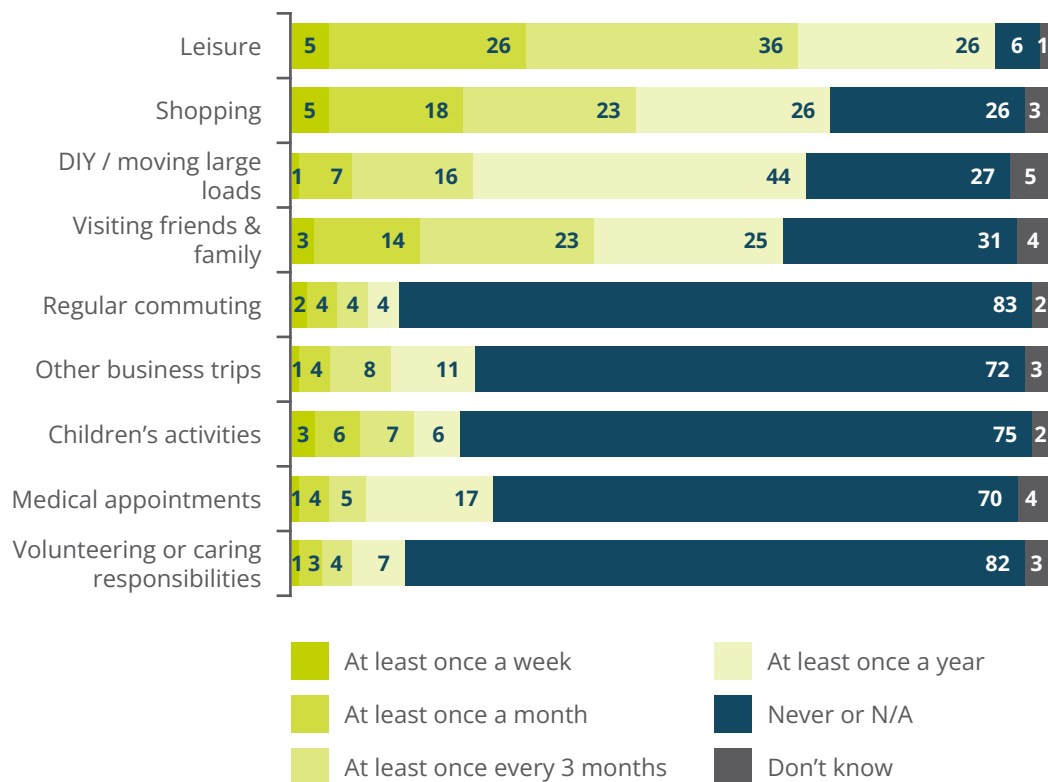
Survey data further reveals how frequently car club cars are being used for different purposes. The trip purpose for which the

largest share of respondents (31%) use car clubs at least once a month is leisure, followed by shopping (23%). These figures include 5% of respondents who use car clubs at least once a week for each of these purposes.

However, for all the purposes listed in the graph on page 12, the majority of car club members claim that they use car clubs less than once a month. This demonstrates that, even for the most popular trip purposes, most car club members do not use car club cars frequently.



## Frequency of using a car club vehicle by trip purpose (values in %)



Co Wheels



31%

of respondents use car clubs  
at least once a month for  
leisure trips



23%

of respondents use car clubs  
at least once a month for  
shopping

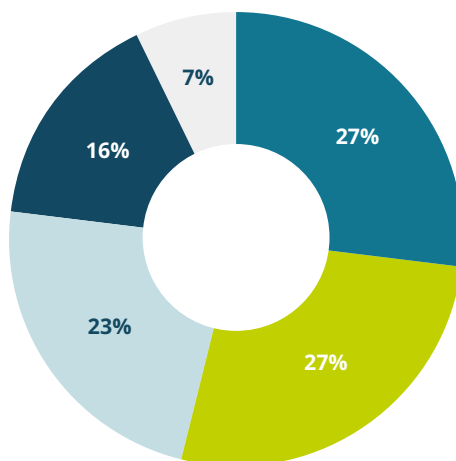
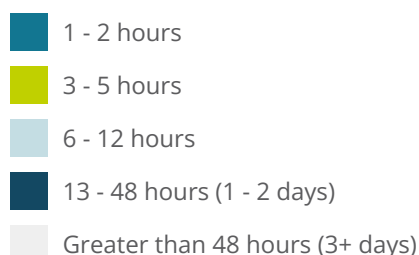
# Journey profile

## Length of hire in time

Operator data on hire times also shows that car clubs are used for a range of trip types. In Scotland, the amount of trips is fairly evenly split between short (1-2 hours), medium (3-5 hours), day-long (6-12 hours) and multi-day (13 hours and more)

trips. 7% of car club hires last longer than 48 hours. The distribution is similar in the rest of the UK, except in London, which accounts for 89% of all car club trips, and where shorter trips dominate (with 63% of trips lasting 1-2 hours).

### Time per trip in Scotland (operator data)

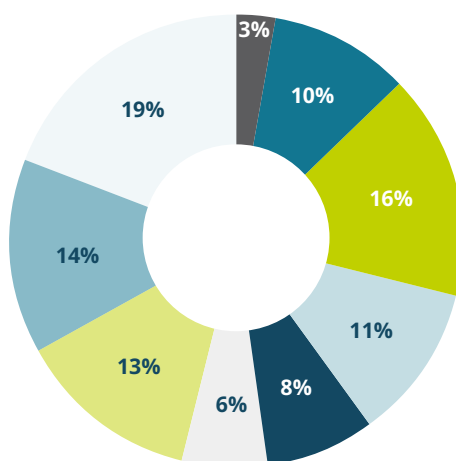


## Length of hire in distance

The average distance driven by car club hire in Scotland is 49.4 miles. This compares to an average distance of 24.9 miles in the whole UK. These numbers are based on operator data, taking the midpoint of each distance range in the graph below. Operator data also shows that around half (49%) of all car club trip

are up to 20 miles long. In the UK overall, 59% of trips are only up to 10 miles. Again, these differences can mainly be explained by the large amount of shorter trips in London. The distribution of distances in Scotland and the rest of the UK outwith London is very similar.

### Distance per trip in Scotland (operator data)

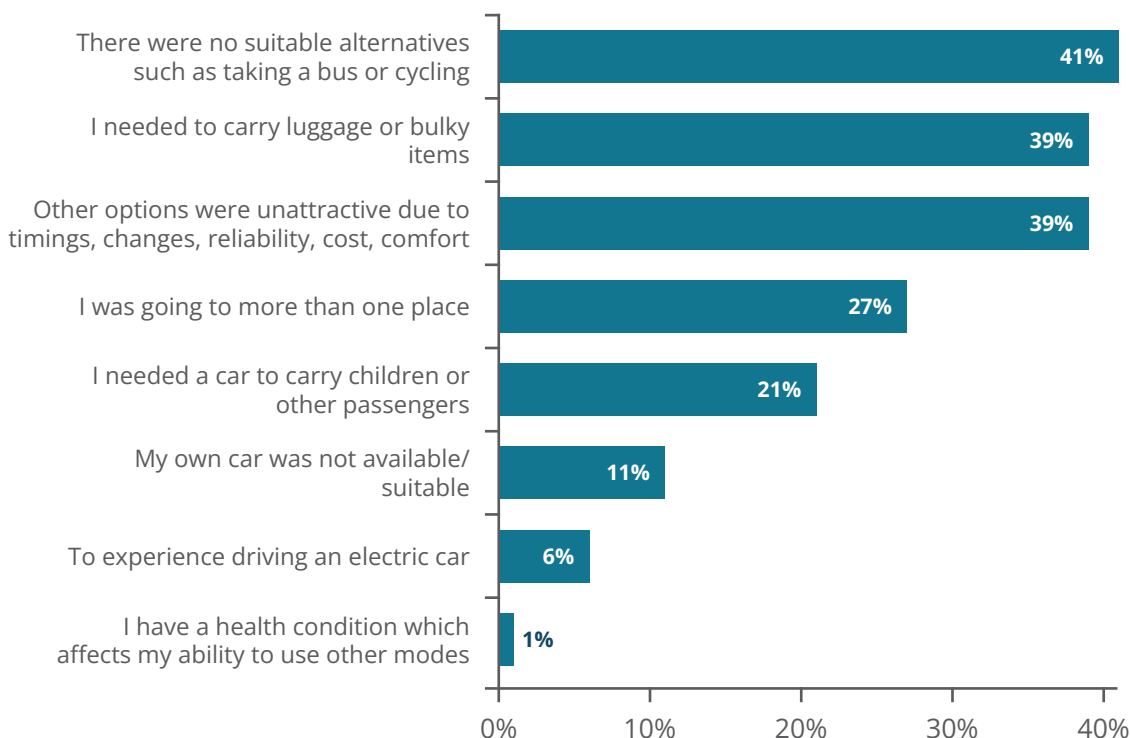


## Reasons for car club use over other modes

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 that there was no suitable alternative such as taking a bus or cycling

(41%), that respondents needed to carry luggage or bulky items (39%), or that other travel options were unattractive due to timings, changes, reliability, cost or comfort (39%).

Reasons for car club use over other modes (respondents could choose more than one option)



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



41%

of car club members said there were no suitable public transport or active travel options

*"I think being part of the car club is great and it means that we don't have to own a car, but we can still occasionally use a car for trips that would be difficult by bike or bus"*

Female user from Edinburgh, 45-54



E-car Club



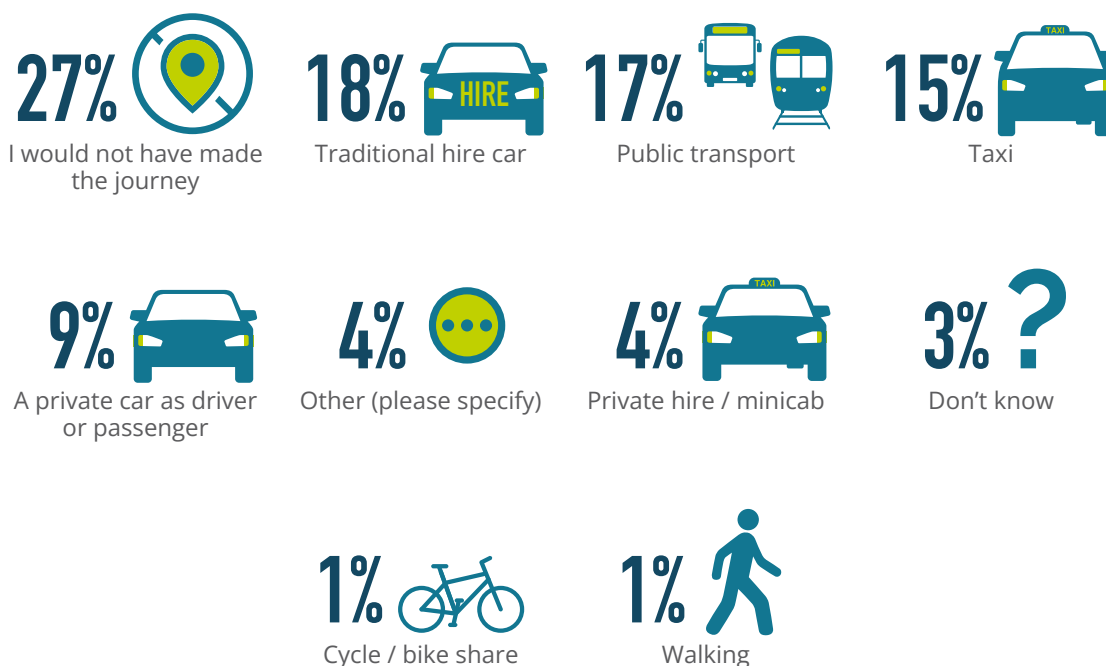
## Modal switch

Car clubs enable members to carry out trips that they would not have made otherwise.

In terms of how respondents reported they would have carried out their last trip if they had not had access to the car club, 27% said they would not have been

able to make the trip. Another 46% stated they would have used another form of car – either a traditional hire car (18%), taxi (15%), a private car (9%) or private hire/ minicab (4%). 17% said they would have used public transport and only 2% would have walked or cycled.

**Mode(s) of transport that car club members would most likely have chosen for their most common trip, if the car club had not been available (respondents could choose more than one option)**



**46%**

of respondents said they would have used another form of car, including private car, taxi, minicab or car hire if the car club wasn't available



Car Bute

## Inclusivity and accessibility

The share of car club members who would not have made their last journey if they had not been able to use a car club car was particularly high among members with lasting health conditions. 40% of members who stated that they had a health condition that reduces their ability to carry out day-to-day activities for 12 months or more (5% of the overall sample) stated that they would not have made their last trip without a car club car.



# 40%

of respondents with a constraining health condition would not have made the trip, had a car club vehicle not been available when they last used it

*"My partner is disabled and can no longer easily access public transportation options. As we do not own a car, we have benefitted from short-term hires from the car club, allowing us to get out a bit more."*

Female user from Edinburgh, 55-64

*"My husband was seriously ill earlier in the year. We had to attend hospital appointments frequently. Public transport was not feasible to the hospital, although it is less than a couple of miles away. Taxis proved inconvenient and expensive. I found it much easier to book a car locally for a few hours at a time. The car club was a great convenience in this period.."*

Female user from Glasgow, 55-64



LEAP Car Club

## Sustainable travel habits

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

- 32% used a bicycle at least once a week. On average, in Scotland, 5% cycled for their commute and 6% cycled for pleasure at least once a week before the Covid-19 pandemic.<sup>1</sup>
- 78% of car club members walked at least once a week for travel (i.e. not for leisure), compared to 67% of the national, pre-pandemic average.
- 48% of respondents used a bus at least once a week and 15% used a train or tram at least once a week. This compares to 2019 Scottish data which suggests 25% used a bus and 9% used a train at least once a week.



32%

of car club members use a bicycle at least once a week, compared to a national average of 6%



48%

of car club members use a bus at least once a week, compared to a national average of 25%



For most members, car clubs do not compete with public transport. This is evidenced by the 62% of survey respondents who state that, since joining

the car club, their use of public transport has stayed the same. 17% even claim that their use of public transport has increased, either a little (9%) or a lot (8%). 13% state that their use of public transport has decreased a little since joining a car club, whilst for 4%, it has decreased a lot. 4% said they didn't know.

*"Living in Stirling, the car club offer enabled me to experience the country's natural beauty... while I can do my daily routine and all other travelling by walking, cycling, bus and trains."*

Male user from Stirling, 25-34

<sup>1</sup> <https://www.transport.gov.scot/publication/transport-and-travel-in-scotland-2019-results-from-the-scottish-household-survey/>, for cycling see Table 25a, for walking see Table 25, for public transport see Table 28.



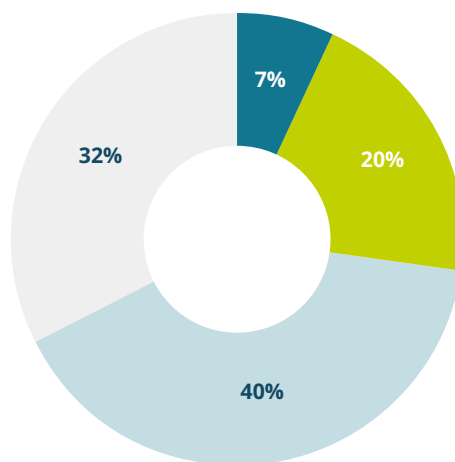
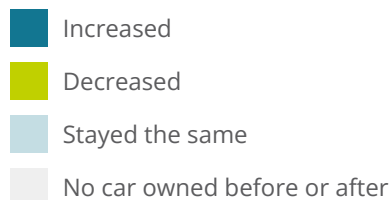
# Environmental benefits of car clubs

## Reducing space required for cars

Car clubs replace privately owned cars with a much smaller number of more efficiently used vehicles, freeing up over 9 hectares, or 13 football pitches, of street space for other uses across Scotland (see below for details). When asked about changes in car ownership, 20% of respondents stated that the number of cars in their household had decreased since joining the car club.

Of these respondents, 10% (22 people) claimed that their household had disposed of more than one car since joining. 72% of survey respondents experienced no change in the number of cars in their household. This includes 32% of respondents who did not own a car before joining the car club.

### Change in number of cars in household since joining car club



7% of respondents stated that the number of cars in their household increased since they had joined the car club. This compares to 29% of respondents who claimed that their household would have bought or leased a car, if they had not become members of a car club.

Overall, 68% of car club members said that their household does not have access to a privately owned car (including company cars). Only 8% said that they had access to more than one privately owned car.



20%

of members had got rid of a car since joining the car club



29%

of members said that they would have bought a car if they hadn't joined the car club

We estimate that, in 2022, each car club vehicle in Scotland replaced around 15 private cars. We arrive at this number by averaging the net car loss of our survey respondents<sup>1</sup> across our entire sample. This indicates that, on average, each car club member disposed of 0.44 cars since joining the car club. Projected to all 18,173 individual active car club members in Scotland, this equals a reduction of 7,949 vehicles across Scotland, or a reduction of 15 cars per car club vehicle currently in operation.



*"The car club changed my life since I don't need to buy a car just to go on holiday, and when I need to go somewhere, there is always a car available for me."*

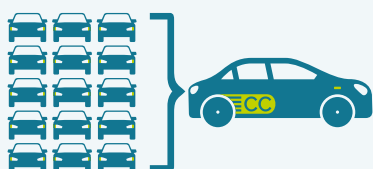
Female user from Edinburgh, 25-34

This reduction in private cars would free up more than 9 hectares of space across Scotland, given that the current UK norm for a parking space is 2.4 by 4.8 metres.<sup>2</sup> This is the equivalent of almost 13 football pitches.

*"We've got rid of two cars and we've never looked back."*

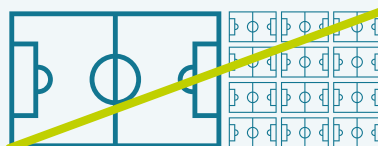
Male user from Edinburgh, 25-34

Enterprise Car Club



15

In 2022, on average, each car club vehicle in Scotland replaced 15 private cars



13

Land equivalent to 13 football pitches, or 9 hectares, was freed up across Scotland by the car reduction due to car clubs

1 This is the sum of all those cars that respondents said that they either sold, or deferred purchasing, since joining the car club, minus those cars that respondents said they bought since joining a car club.

2 [https://www.britishparking.co.uk/write/Documents/Library%202016/Bay\\_Sizes\\_-\\_Jul\\_2016.pdf](https://www.britishparking.co.uk/write/Documents/Library%202016/Bay_Sizes_-_Jul_2016.pdf)

## Economic aspects of car reduction

Car ownership tends to be the lowest among individuals on lower incomes.<sup>1</sup> Among survey respondents with a gross annual income under £10,000, 74% did not have access to a car in their household, compared to 61% with a gross annual income over £50,000. Hence, it is not surprising that a reduction in car

ownership since joining a car club was most often reported among high income earners. While only 14% in the <£10,000 income bracket stated that the number of cars in their household decreased, 25% of survey respondents in the >£50,000 income bracket reduced the number of cars in their household.

## Improving air quality

- 21% of Scotland's car club fleet are electric vehicles. This compares to 18% in 2021, and to 14% for the UK car club fleet as a whole. Less than 2% of private cars in the UK are currently electric.
- 100% of Scottish car club cars are compliant with low emission zones.
- 100% of Scottish car club vehicles are under 5 years and 36% are under 2 years old.
- In our survey, of the cars disposed of by members, 74% were reported to be older than 5 years, including 33% older than 10 years



Co Wheels

## Carbon emission reductions from cleaner vehicles



From our comprehensive 2020 fleet analysis,<sup>2</sup> we know that emissions from car club vehicles in Scotland are, on average, 37% lower than the average UK car.

<sup>1</sup> See also <https://www.transport.gov.scot/media/48317/sct09201490081.pdf>, Table 18

<sup>2</sup> [CoMoUK Car Club Annual Report Scotland 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 who reduced their mileage. 30% of survey respondents stated that, on average, they had reduced their monthly car miles since joining a car club, with 35% saying they didn't know, 22% saying no change, and 12% reporting a mileage increase. All those indicating an increase or decrease also gave an estimate of the amount (with the 35% saying 'don't know' partly being those who felt uncomfortable providing a specific estimate).

Based on this survey data, we estimate that, averaged across all car club members, each car club member has reduced their monthly car mileage on average by 15 miles.<sup>1</sup> This would equal a yearly reduction of 180 miles. Given that 3,509 car miles were driven on Scottish roads per capita in 2021, this would represent an annual reduction in car mileage travelled of about 5%.<sup>2</sup>

While we acknowledge the numerous caveats to this crude estimate the key finding is clear: car clubs can play a

fundamental role in achieving the Scottish Government's goal to reduce driven car kilometres by 20% by 2030.<sup>3</sup>

Whilst, overall, there was a net reduction in mileage by car club users, it was still the case that some members were also using private cars and taxis. About one third (32%) of respondents had access to one or more private cars in their household. Similarly, 32% used a private car at least once a week. However, this compares to national data suggesting that 64% of those aged 17+ drove at least once a week before the Covid-19 pandemic, with 43% driving every day.<sup>4</sup>

Even for car owners, the car club was allowing them to avoid owning a second or third car which could have led to higher mileage. Among those respondents who disposed of one or more cars since joining the car club, 59% claimed that they had reduced their monthly car mileage (compared to 30% in the overall sample). A quarter of those respondents who reduced the number of cars in their household (54 people) even stated that they reduced their monthly mileage by more than 100 miles.



# 180 miles

per year is the net average car mileage reduction per Scottish car club user. This is equivalent to 5% of the average yearly car mileage per person

### CAR USE BY CAR CLUB MEMBERS, ONCE A WEEK OR MORE



## 32%

Private car  
(driver/passenger)



## 7%

Taxi



## 4%

Private hire /  
minicab

- 1 We calculate this based on results to the question "Since joining the car club, on average, how, has your total monthly car mileage changed, (car club, private car, taxi and hire car)?" Respondents could choose a mileage range by which they either reduced or increased their mileage. We calculated the average net reduction per member, using the midpoint of each range and assuming that a reduction/increase of more than 101 miles equalled 150 miles. We further assumed that respondents who chose "don't know" did not change their monthly car mileage. We presume that car mileage relates to that travelled as either a driver or a passenger.
- 2 Based on road traffic statistics, 19.3 billion miles were driven by cars and taxis on Scottish roads in 2021 (<https://roadtraffic.dft.gov.uk/regions/3>). Scotland had an estimated population of 5.5 million (<https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/settlements-and-localities/mid-2020>). The resulting yearly per capita car mileage for Scotland, 3,509 miles, is very similar to the 3,483 miles that are driven each year by an average person in England, based on the 2021 National Travel Survey (<https://www.gov.uk/government/statistical-data-sets/nts03-modal-comparisons#mode-by-age-and-gender>).
- 3 <https://www.transport.gov.scot/our-approach/environment/20-reduction-in-car-km-by-2030/>
- 4 <https://www.transport.gov.scot/publication/transport-and-travel-in-scotland-2019-results-from-the-scottish-household-survey/motor-vehicles-traffic-and-driving/#sec11>

## Customer satisfaction

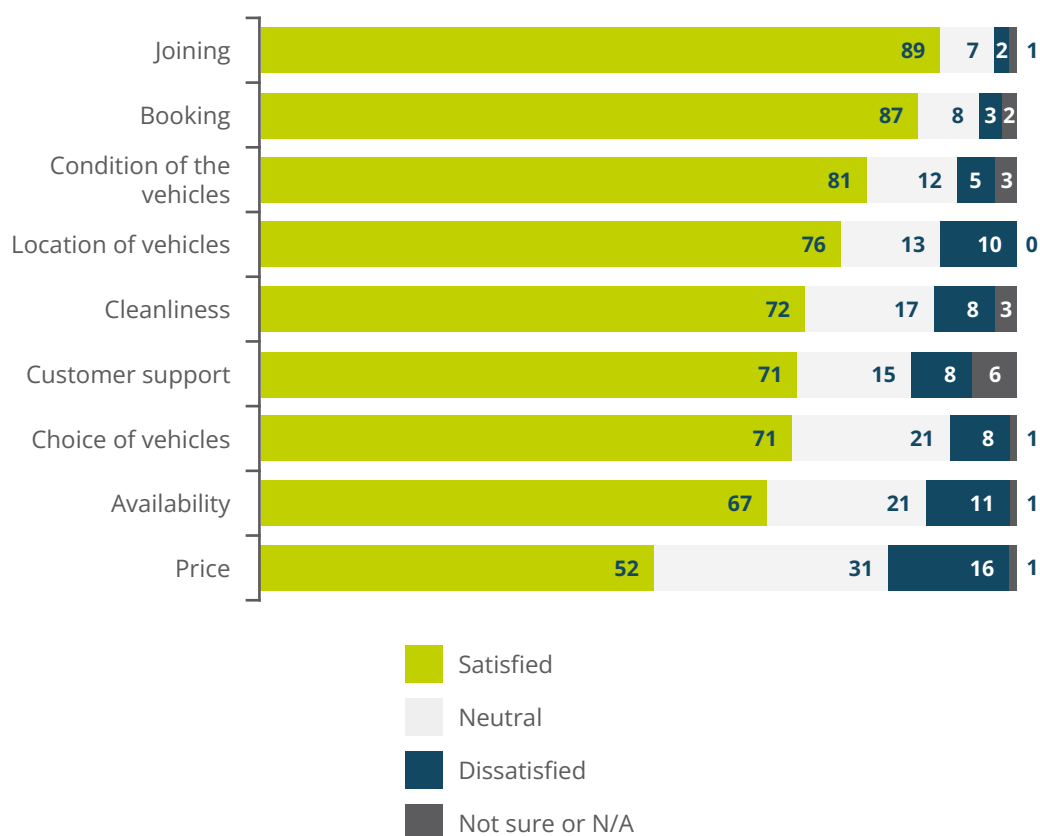
Members were asked about their levels of satisfaction with a range of aspects of the service. The majority of respondents were satisfied or very satisfied with all aspects of the services, from the joining process (89%), to making a booking (87%), and the condition of vehicles (81%).

Fewer people were happy with the availability of vehicles (67%) and the price of hires (52%). Compared to our 2021 survey, user satisfaction averaged across all aspects of the service (measured as the share of satisfied or very satisfied users) has increased by 10 percentage points.

*"With cars being located all over the city where I live, I never have to walk far to have access to a car. If I need help, the car club is always available to answer any questions I have had. Outstanding hire support makes hiring a car very relaxed."*

Male user from Glasgow, 55-64

Customer satisfaction (values in %)



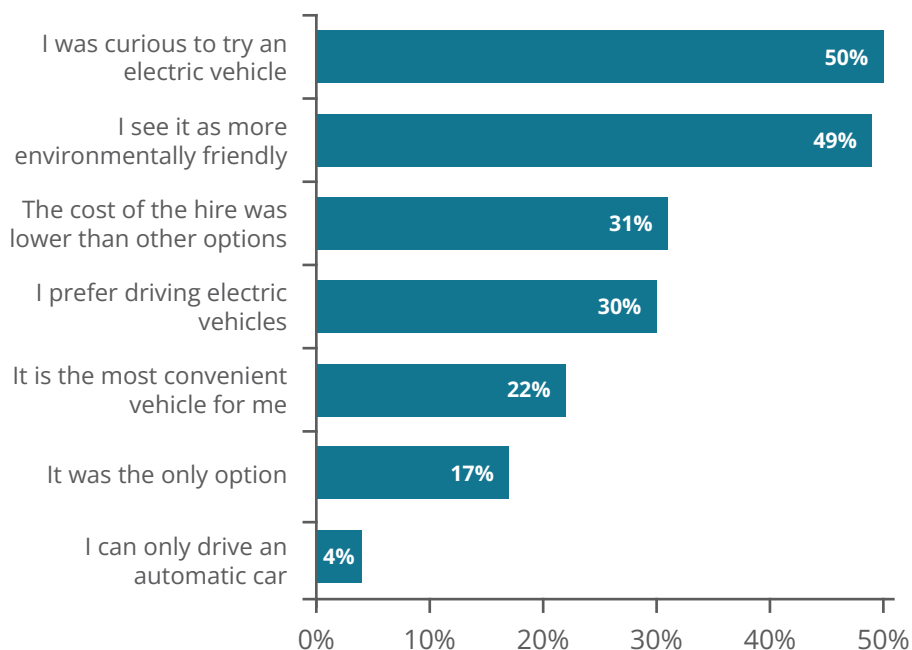
## Electric car adoption

49% of respondents had used a fully electric car club vehicle. This is a significant increase from the 37% who had done so in 2021.

When asked about their reasons for

using an electric car, in a question where multiple options could be chosen, 50% of electric car users said they were curious to try one, 49% were keen to be more environmentally friendly and 31% stated that it was cheaper.

**Reasons for choosing electric car club vehicles (respondents could choose more than one option)**



Among those respondents who had not hired an electric vehicle, 34% said (in a question where multiple options could be chosen) that they had not done so because there were none available in their area, 29% were concerned about charging, 24% said that there were no electric vehicles available when they tried to book them and 20% said they did not know how to use them. This demonstrates that, whilst technical issues are a concern for some car club members, availability of electric cars is currently the most important obstacle to car club members using more emission-free vehicles.

The satisfaction levels with electric vehicles among car club members were generally high. 91% said they were satisfied or very satisfied with driving an electric car. 71% were satisfied or very satisfied with the instructions that they received from car club operators. Around two-thirds were happy with their experience of using charging points at the end of the hire (67%)

satisfied or very satisfied), and with the charge level at the point of pick up (66%). Satisfaction levels were somewhat lower for electric vehicles' mileage range (59% satisfied or very satisfied) and for charging the car mid-hire (31%).

The majority of electric car club vehicle users (56%) used dedicated car club bay charge points to charge the vehicle, with 22% using on or off-street chargepoints, 15% not charging the vehicle and 7% saying 'don't know' or other.

*"I really like driving an electric car and it's still new enough to feel like a community of people trying to live more sustainably. People driving electric cars talk at charge points and share experiences, and often help each other by communicating together when there's a queue."*

Female user from East Lothian, 55-64



91%



of respondents were satisfied with driving the electric car club vehicles



2/3



of respondents were satisfied with charge level at pick up and charging at end point



## Data, contacts and further information

The CoMoUK Car Club Annual Report 2022 for Scotland 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 car share, bike share, lift share, e-scooter and digital demand responsive transport. 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.



*Enterprise Car Club*



### 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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*E-car Club*

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