

CoMoUK Annual Car Club Report

LONDON

2022



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2022

CAR CLUB MEMBERS



667,440 members

↑ 125% (2019 = 296,367 members)

FLEET SIZE



3,506 vehicles

↓ 2% (2021 = 3,582 vehicles)

LOW CAR LIFESTYLES



70%

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

REDUCING PRIVATE CAR OWNERSHIP



29

In 2022, each car club vehicle in London on average replaced 29 private cars, up from 24 in 2021

FREEING UP PUBLIC SPACE



116 ha

116 hectares, or land equivalent to 6 Green Parks, was freed up across London by the car reduction due to car clubs

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



43%

of respondents said that other options would have been unattractive due to timings, cost or other factors



40%

of respondents said they used the service for carrying bulky items



52%

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



16%

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

SUSTAINABLE TRAVEL CO-BENEFITS



33%

of car club members use a bicycle at least once a week, compared to a London-wide average of 18%



75%

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



66%

of respondents used a train or tram at least once a week, while 60% of respondents used a bus at least once a week



24%

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



8%

User satisfaction with all aspects of car club operation has improved on average by 8 percentage points in the last 12 months



>80%

of car club users are satisfied with joining and booking a vehicle

COST SAVINGS



72%

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



34%

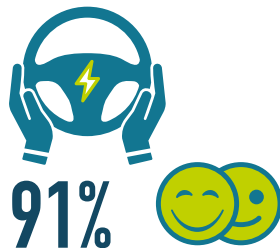
of car club members said that saving money was a reason for joining the car club

ELECTRIC CARS



47%

of survey respondents had used a fully electric car club vehicle



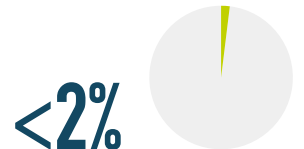
91%

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



15%

of the car club cars in London are electric, up from 12% in 2021



<2%

of private cars in the UK are electric



72%

of users were satisfied or very satisfied with the instructions that they received from operators



73%

of users were satisfied or very satisfied with the mileage range

FUEL TYPE



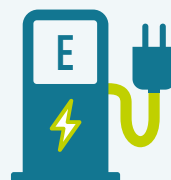
59%

Petrol



11%

Petrol hybrid



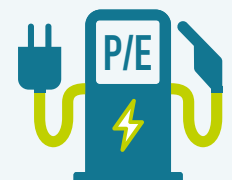
15%

Electric



15%

Diesel (vans only)



<1%

Plug-in hybrid

CLEANER AND SAFER

<5 YEARS



100%

of cars are under 5 years

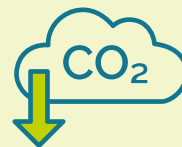
<2 YEARS



69%

of cars are under 2 years old

CARBON EMISSIONS



27%

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



100%

of UK car club cars are compliant with Low Emission Zones

Foreword

Welcome to the CoMoUK Car Club Annual Report for London covering 2022. This is the latest in our long-running series of insights into car club use and its social, ecological and economic impacts. At a time in which the cost of living, pressures on supply chains and long-term effects of the Covid-19 pandemic influence travel behaviour, it is motivating to see that car clubs continue to provide affordable and accessible access to cars for select journeys when they are needed, at the same time boosting public transport use, walking and cycling and cutting the number of cars in our capital city. This set of co-benefits is why car clubs in London deliver so strongly on London's goal of being a net zero carbon city by 2030 and of having an 80% sustainable mode share by 2041.

A striking 72% of London-based respondents said that being a car club member saves them money compared to owning a car. Among respondents with a gross annual income under £10,000, 29% stated that they would not have been able to make their trip the last time they were using a car club if the car club had not been available.

Car clubs also free up much-needed space by replacing private cars with a much smaller number of much more efficiently used vehicles. We estimate that, in 2022, each car club vehicle in London replaced around 29 private cars. Across London, this scales up to a reduction of 100,645 cars. If these were parked next to each other, they would take up 116 hectares of land – or to put it another way, more than six Green Parks.

In our 2022 [Driving London Forward](#) report, we identify that car clubs have the potential of reducing the need for 300,000 more cars in London, with proportionate benefits for land use in a densely populated global city like ours.

Car clubs are also pioneering London's transition towards electric vehicles. 15% of London's car club cars were electric vehicles in 2022, compared to just under 2% of the UK's overall car fleet. Hence, car clubs lead on the phasing out of older, more polluting cars, as is required within London's Ultra Low Emission Zone (ULEZ).

For more on our work across shared transport in the UK, visit us at como.org.uk.

Richard Dilks
Chief Executive, CoMoUK



Hiyacar

Introduction

This CoMoUK Car Club Annual Report 2022 for London 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 16 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 car club operators in London (Zipcar, Enterprise Car Club, Ubeeqo, Co Wheels and the car club section of Hiyacar).

The data was collected in two parts:

- A car club members' survey, which was completed by 3,323 London-based respondents, 3,093 of which were private users as per the definition 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, 3,093 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%.



Co Wheels

Car club membership

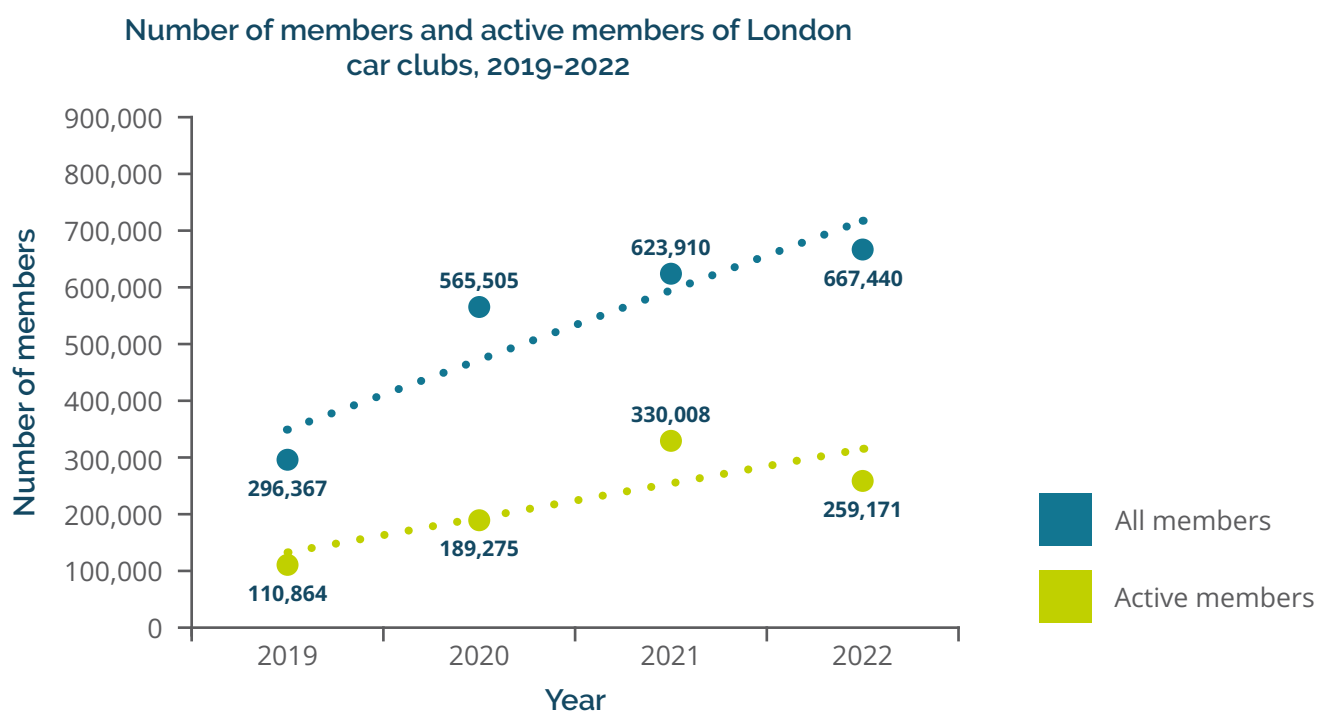
Membership growth

According to operator data, membership of car clubs in London has grown substantially in recent years. By October 2022, the total number of car club members was 667,440 – an increase of 125% compared to before the Covid-19 pandemic.

The number of active members (i.e. those who have joined, renewed their membership or used a car club vehicle in the last year) amounted to 259,171. This includes 245,632 individual active members and 13,539 corporate active members.

While the number of active members has decreased compared to 2021, it has grown by 134% compared to active membership pre-pandemic (2019), and, as shown in the graph, there has been clear long-term growth.

In 2022, 94% of all London car club members were individuals, whilst 6% were corporate memberships. Of active members, 95% were individual members and 5% corporate members.



It is important to note that these figures represent total membership numbers. Some survey respondents may be members of 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, 28% stated that they had joined the car club that they use most often in 2022, 15% in 2021, and 10% in 2020. 40% had joined before 2020, whilst 6% stated that they did not remember when they joined. This ensures that our sample represents the views of newer,

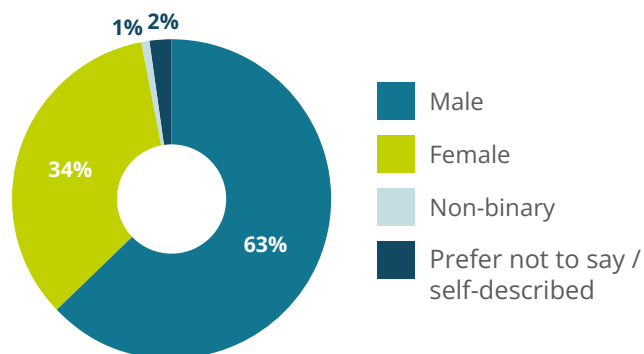
as well as of more experienced car club members.

4% of survey respondents hadn't used the car club in the last 12 months. Among these people, the largest number of respondents (59%) said they just haven't needed the service, 17% said that it was too expensive and 16% said that they were only car club members as a back-up. Vehicles not being close enough and changes in personal circumstances were among the other reasons chosen. Respondents could choose more than one answer to this question.

Membership demographics

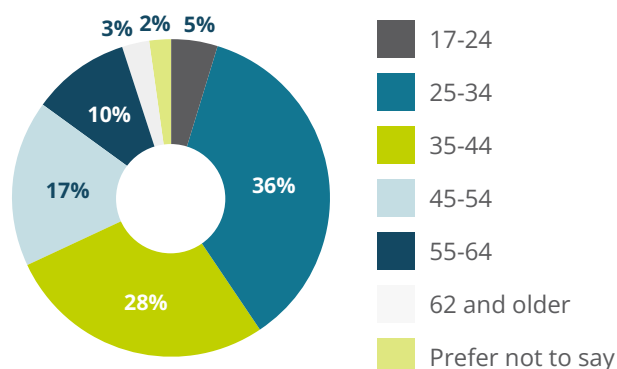
Gender

63% of respondents to the survey identified as male, whilst 34% identified as female. The remaining 3% identified as a non-binary or preferred not to answer. This gender gap is also reflected, although to a considerably lesser degree, by the overall population of drivers in the UK: in 2021, while 80% of men aged 17 and over held a driving license, only 74% of women did so.¹



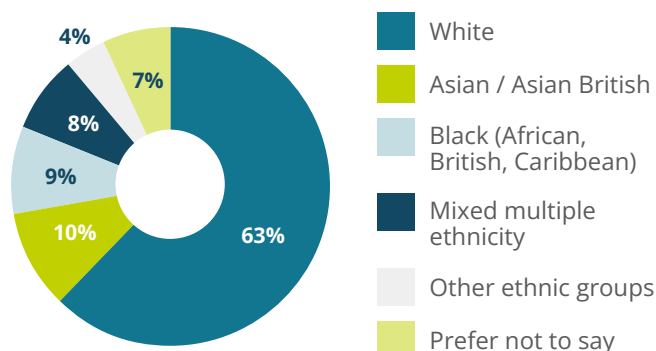
Age

Operator data indicates that more than two thirds of car club members are between 21 and 39 years old. Our survey sample is slightly more evenly distributed across age brackets (with 2% of respondents indicating 'prefer not to say').



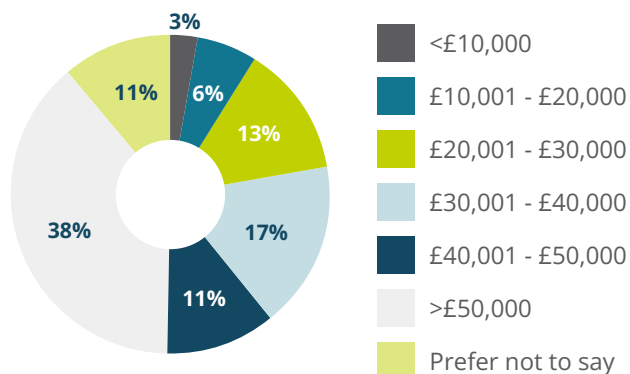
Ethnicity

In terms of ethnic background, 63% of respondents identified as white, 10% as Asian, 9% as black and 8% identified with mixed or multiple ethnic groups. 4% said that they identified with another ethnic group, whilst 7% preferred not to answer this question. Compared to 2021 Census data, ethnic minorities are underrepresented among the London-based car club users in our survey sample.² This stands in contrast to the UK overall, where survey respondents are more ethnically diverse than the overall population.



Income

When asked about personal income levels, there was a concentration of respondents in higher income brackets, with 38% of respondents claiming that their gross annual income is more than £50,000. Only 9% of respondents stated that their gross annual income is £20,000 or less. In our UK-wide sample, survey respondents were more evenly distributed across income brackets, reflecting the lower average incomes outside London.



¹ [National Travel Survey NTS0201](#)

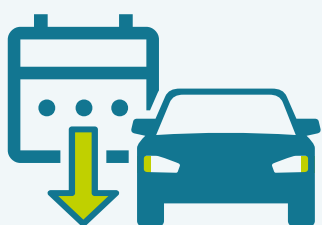
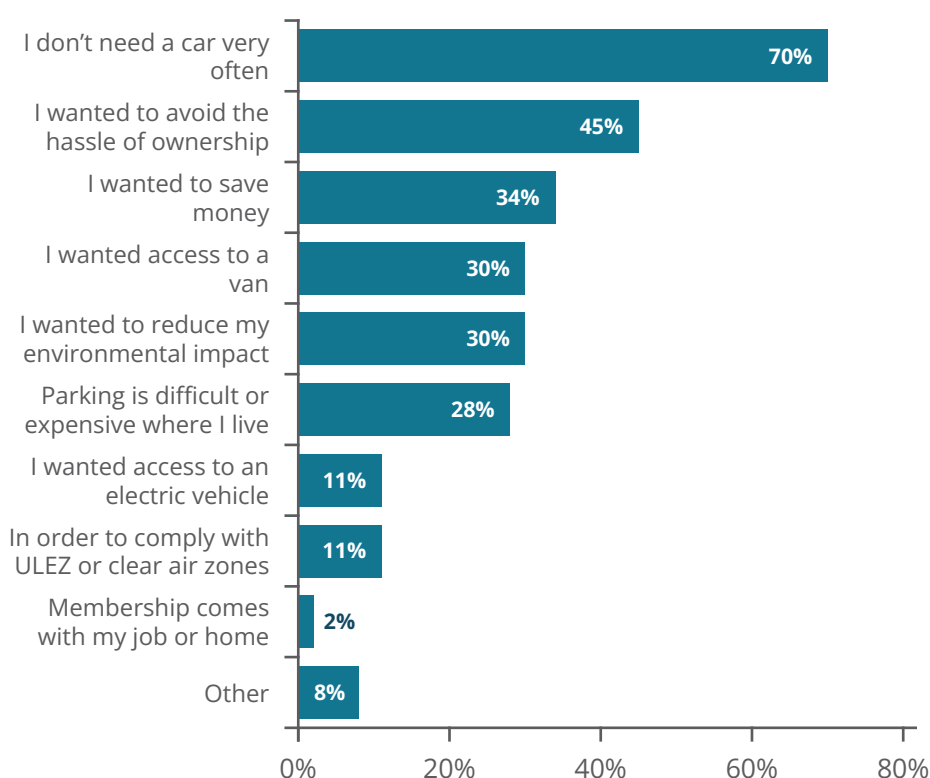
² [UK Government: Ethnicity facts and figures](#)

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 have car-light lifestyles and wish to reduce the costs, the stress, and the environmental footprint of personal car ownership. 70% of respondents said they rarely need 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 (45%), followed by aim to save money (34%). 30% wanted access to a van and 30% wanted to reduce their environmental impact. 28% stated issues with parking in their local area. Access to an electric vehicle (11%) and the aim to comply with London's Ultra Low Emission Zone (ULEZ) (11%) were also stated as a motivation to join car clubs.

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



70%

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

"Since deciding to start cycling and reduce my impact on the environment, having a car club membership has become an essential part of my life and I now only use a car when I absolutely need one."

Female user, 55-64

"Car clubs are great - they have enabled us not to own a car, which is better for the environment and saves us money - winner!"

Female user, 35-44

Cost savings

34% 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 (16% of the overall sample), 72% indicated that car club membership saves them money compared to owning or leasing a car, with only 5% 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, 68% estimated that they were saving at least £50 a month.

"I love car sharing - it allows me to have the freedom of driving when I need to without the expense of owning my own car."

Female user, 25-34



Enterprise Car Club



34%

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



72%

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



68%

of those who had got rid of a car saved at least £50 per month

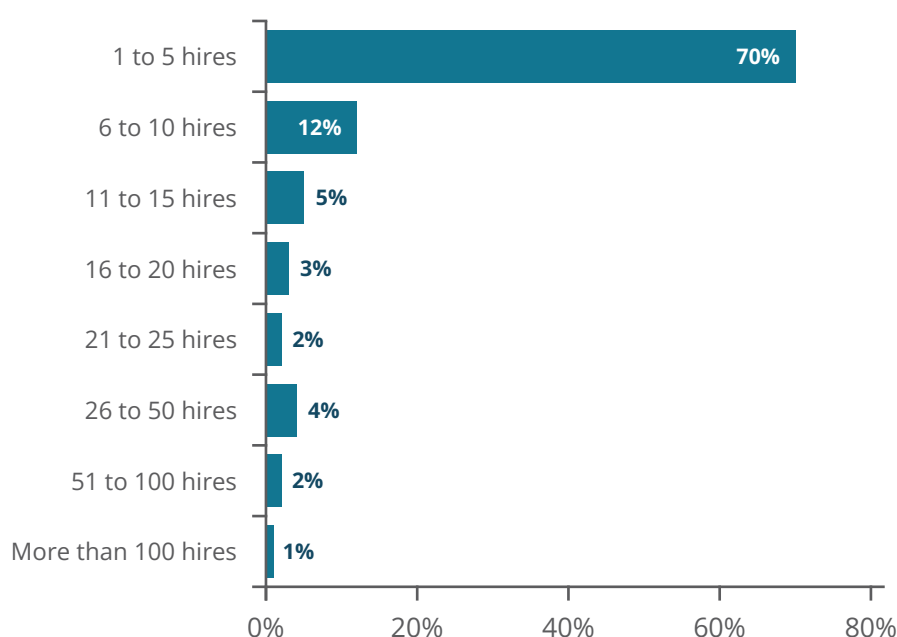
Trip purpose

Car club members are infrequent drivers. When examining operator data for the period October 2021 to September 2022, 70% of individual and corporate members in London used the car club fewer than 6 times over the year. Another 12% used it between 6 and 10 times per year. These numbers for London are identical with UK-wide numbers. In 2021, 63% of individual and corporate members in London used

the car club fewer than 6 times.

Some operators also included members who did not hire a car in the last 12 months in their records. This data shows that, for some operators, more than half of their members who have made a financial commitment in the last year have not hired a car, underlining the fact that many car club members use car clubs only as a back-up.

Frequency of annual car club hires per active member (operator 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, excluding members with 0 hires

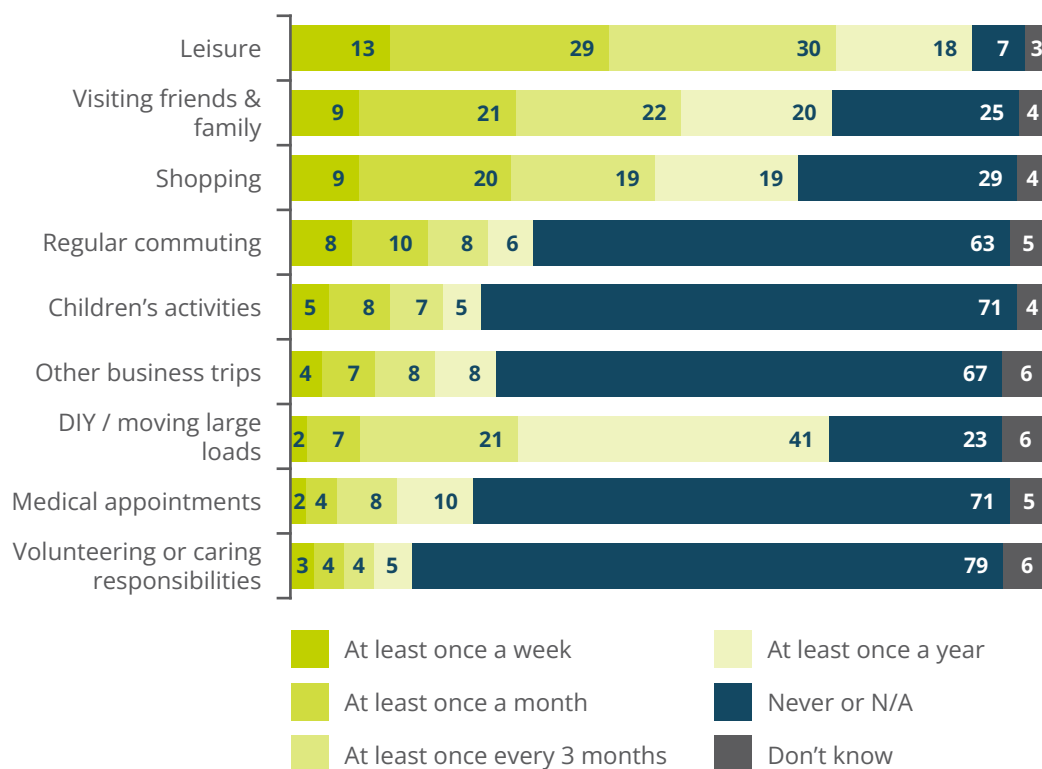
There is also evidence showing that car club members generally use cars less frequently after joining. When asked how often they were travelling in any kind of car or van (either car club vehicle, private car, taxi or hire car), 46% of respondents stated that they used a car at least once per week before joining a car club, whereas only 40% 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 (42%) use car clubs at least once a month is leisure, followed by visiting family and friends

(30%) and shopping (29%). For leisure, 13% of respondents use car clubs at least once a week and another 29% use it at least once a month. For visiting family and friends and shopping, 9% of respondents are weekly users, whilst 21% and 20% use car clubs for those purposes at least once a month, respectively.

However, for all the purposes listed in the graph below, 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 %)



Zipcar



42%

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



30%

of respondents use car clubs at least once a month to visit family and friends

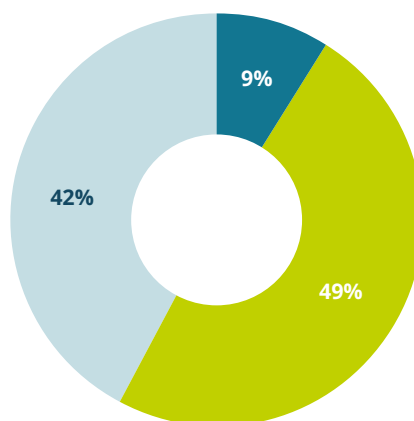
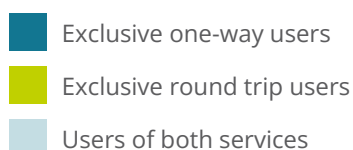
Round trips and one-way trips

London is currently the only location in the UK where car clubs offer the option for both round trips and one-way trips. Round trips are trips where the car club car needs to be returned to the same parking bay or geo-fenced area that it was picked up at the beginning of the hire. This is the only car club model currently available in the UK outside of London. These trips are typically charged by the hour.

For one-way trips, the car club car can be returned anywhere within a designated area (currently 15 London boroughs and two locations at airports) at the end of the hire. Between October 2021 and September 2022, one-way trips accounted for 58% of all car club hires in London. These trips are typically charged by the minute.

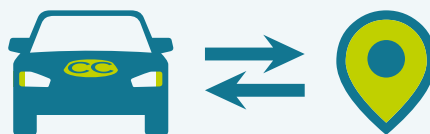
Among survey respondents, 51% stated that they used car clubs for one-way trips. Of those, 42% said that they used car clubs for both round trips and one-way trips. This percentage includes users who used both services from the same operator, as well as members of multiple car clubs. The relatively high share of users who combine one-way and round trip services also demonstrates the complementary nature of these two services. Only 9% of respondents said that they used car clubs exclusively for one-way trips. 49% of survey respondents used car clubs for round trips only, which is partially due to one-way services not being available in all parts of London.

Share of survey respondents that use car clubs for one-way trips, round trips or both



58%

of all car club hires in London are one-way trips



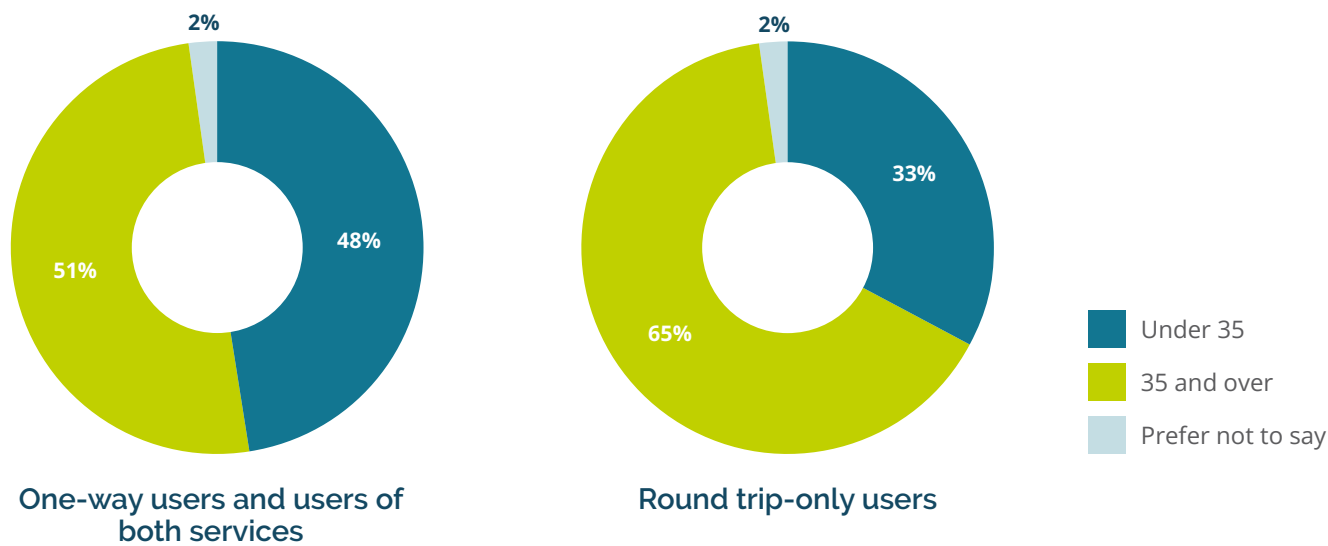
42%

of London car club members use car clubs for both one-way trips and round trips

One-way trips are more common among younger car club users. 48% of survey respondents who use car clubs for one-way trips or who use both car club services are

under 35 years of age. In comparison, 65% of London-based respondents who use car clubs exclusively for round trips are 35 or more years of age.

Users of different car club services by age group



Car club members who use car clubs for one-way trips and those who use them for one-way and round trips are also somewhat more frequent car club users than those who use it only for round trips. As in the overall survey sample, trips for leisure and for visiting friends and family are the most common trip purposes, with 18% and 12% of all one-way users and users of both services claiming that they use car clubs at least once a week for those respective purposes (compared to 13% and 9% in the overall sample). For each trip purpose that we asked about in our survey,

one-way users and users of both services used car clubs more frequently.

However, regardless of car club use patterns, car club members use cars significantly less often than London's overall population. While only 40% of all London-based survey respondents said that they use any kind of car (private, car club, taxi or private hire) at least once a week, 62% of all Londoners used a privately owned car at least once or twice a week in 2021.¹

1 Requested from National Travel Survey, NTS0313 for London

Journey profile

Length of hire in time

Operator data shows that car clubs are predominantly being used for trips under 2 hours.

One-way trips are naturally shorter than round trips, since they usually only cover one leg of a journey. At the same time, our qualitative data shows that one-way trips are also used for different kinds of trips. Respondents stated that they use one-way trips to access other means of transportation, such as going to an airport or a train station, or to complete a journey when other means of transport are not available, for instance, outside the operating hours of public transport.

"We are a 2 adult-2 children-household. Only I have a driving licence. The combination of excellent Inner London public transport and one-way car club trips, combined with family being generally a tube/train ride away has meant we could get rid of our car."

Male user, 35-44

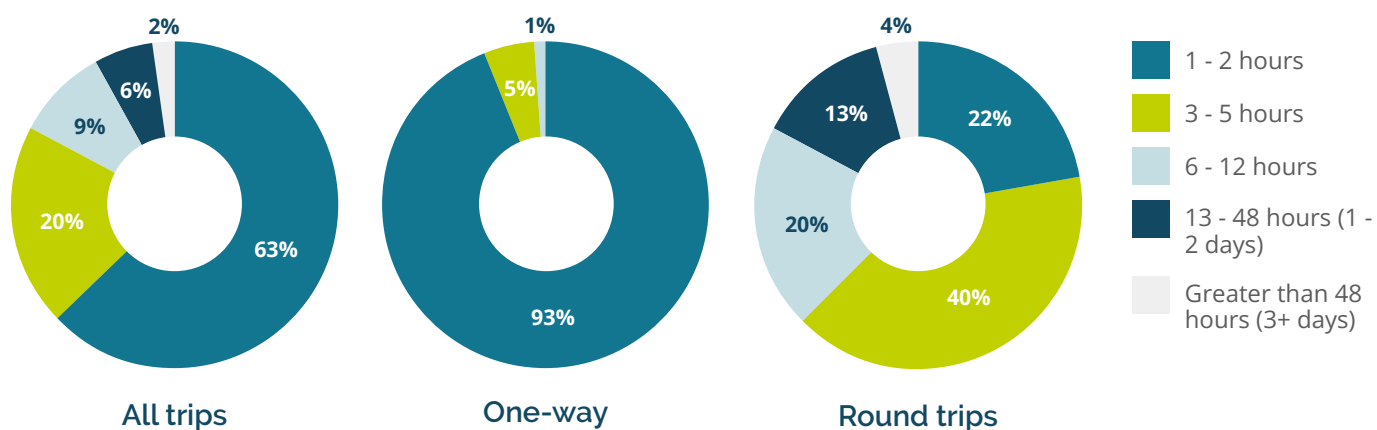


Ubeeqo

63% of all car club hires in London last less than 2 hours. Among one-way trips, 93% of all hires last less than 2 hours, compared to 22% of all round trips.

It is important to note that the average car trip for drivers in London was only 24 minutes in 2021. For car trips undertaken as a passenger, the average trip length was 22 minutes.¹

Time per trip (operator data)



¹ Requested from National Travel Survey, NTS0303 for London

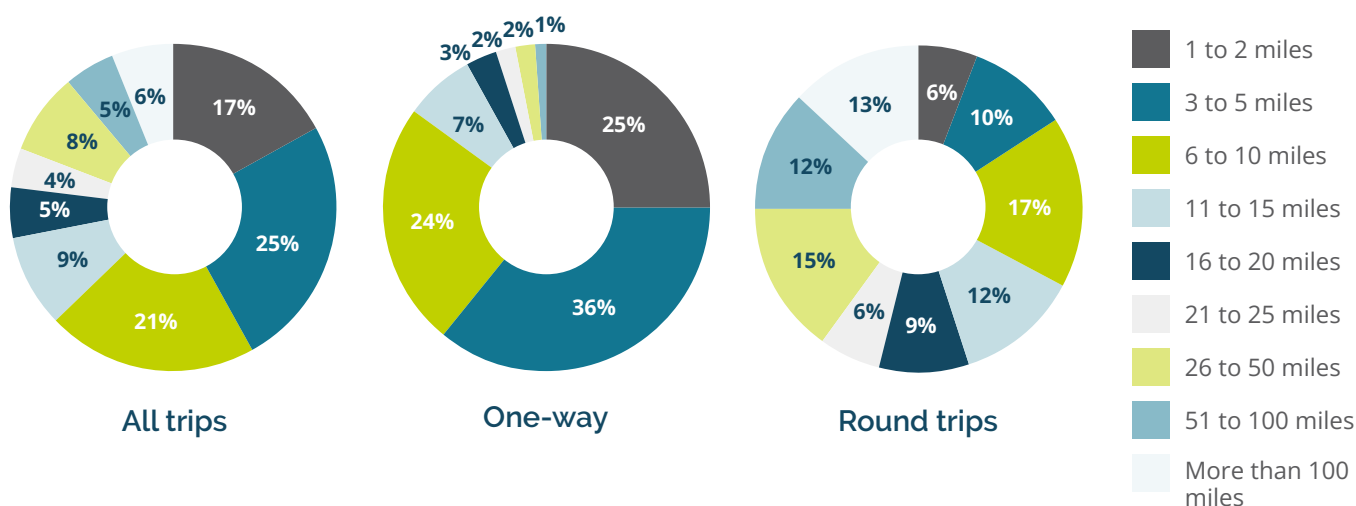
Length of hire in distance

The median distance driven per car club hire in London is 8 miles. 63% of all car club trips in London are 10 miles or less. For one-way trips, this number amounts to 85% of all hires, compared to 33% of all round trips. For one-way trips, 61% of all hires are 5 miles or less, whilst a quarter of trips are 2 miles or less. The distance of one-way trips is naturally shorter than that

of most round trips, since the former only cover one part of a journey.

The average distance of car trips undertaken as a driver in London was 6.8 miles in 2021; for car trips undertaken as a passenger, the average distance was 6.6 miles.¹

Distance per trip (operator data)



Enterprise Car Club

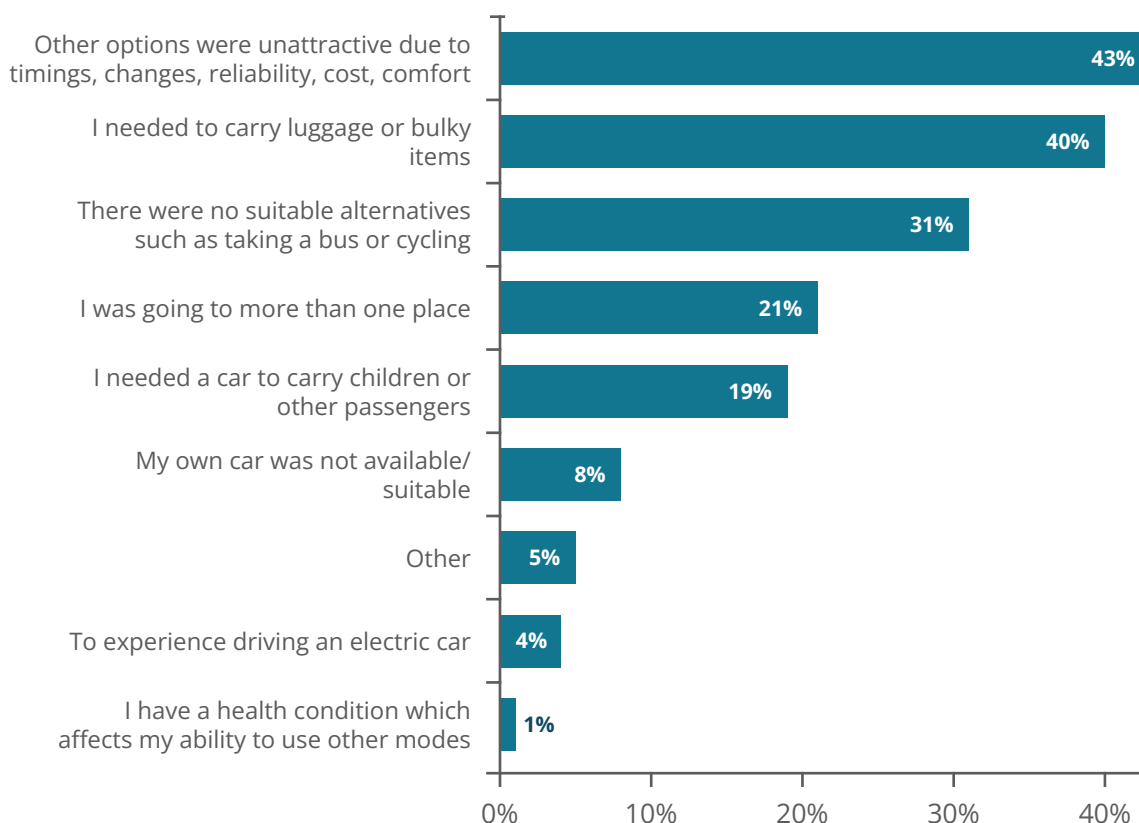
¹ Requested from National Travel Survey, NTS0303 for London

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 other options were unattractive due to

timings, changes, reliability, cost or comfort (43%), that respondents needed to carry luggage or bulky items (40%), or that there were no suitable alternatives such as taking a bus or cycling (31%).

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



43%

of car club members said that other travel options were unattractive for the purpose of their last car club trip

"It's great to be able to give people a lift to somewhere they need to go, or help them move house or to a new city. I wouldn't be able to do that without a car club membership."

Non-binary user from London, 25-34

"Having local cars and vans available for jobs that aren't suitable for public transport is incredible for saving time and money, it's been truly life-changing."

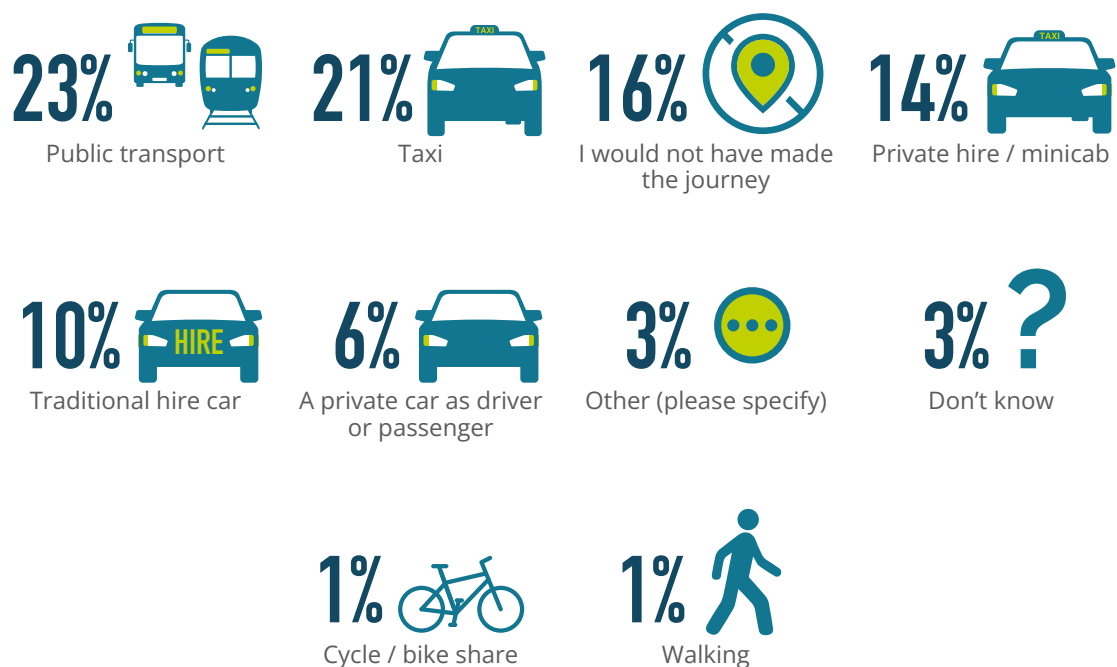
User, age and gender unknown

Modal switch

Car clubs help members to use cars more efficiently. In terms of how respondents reported they would have carried out their last trip if they had not had access to the car club, more than 50% stated that they would have used another form of car (21% taxi, 14% private hire or mini cab, 10% car hire, 6% private car). 23% of all car club trips in London would have been made by

public transport, had car clubs not been available. 16% of respondents stated that they would not have been able to make the trip if car clubs hadn't been available when they last used them. 1% of respondents stated that they would have walked and another 1% stated that they would have cycled if car clubs had not been available. 6% responded 'other' or 'don't know'.

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)



51%

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



16%

of respondents said that they wouldn't have been able to make their trip without the car club

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 somewhat higher among members with lasting health conditions. 24% of members who stated that they had a health condition that reduces their ability to carry out day-to-day activities (lasting or expected to last for 12 months or more), comprising 4% of the overall sample, stated that they would not have made their last trip without a car club car. This compares to 16% of respondents without a lasting health condition.



"Often because of a physical disability I find it difficult to travel on public transport. Having access to a car club has made my life much easier."

Male user, 55-64

Respondents on lower incomes also stated more frequently that they would not have been able to make their last trip without a car club car, compared to those on higher incomes. Of respondents with a gross annual income under £10,000, 29% stated that they would not have been able to make their last trips without a car club car. Among the other income groups, this percentage oscillates between 15% and 16%.

"I have a disabled daughter so the car club is very helpful as public transport can be tiring."

Male user, 45-54

LEAP Car Club



24%

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



29%

of respondents on the lowest income band (<£10,000) would not have made the trip, had a car club vehicle not been available when they last used it

"It really helps during desperate times as it's already hard to afford a car nowadays."

Female user, 25-34

Sustainable travel habits

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

- 33% of car club members used a bicycle at least once a week. In 2021, only 18% of people in London cycled once a week or more on average.¹
- 75% walked at least once a week for travel (i.e. not for leisure). For London's population as a whole, 82% walked for at least 20 minutes once a week or more often in 2021. However, this latter number also includes walks for leisure.²
- 66% of respondents used a train or tram at least once a week, 60% of respondents used a bus at least once a week. This compares to a London-wide average of 16% and 38%, respectively, in 2021.³

The finding that car club members tend to travel more sustainably than the national average holds true for both one-way car club users and exclusive round trip users. However, the share of one-way users who state that they use a sustainable form of travel on a weekly basis is slightly higher than the share of round trip-only users for each of the aforementioned sustainable modes.

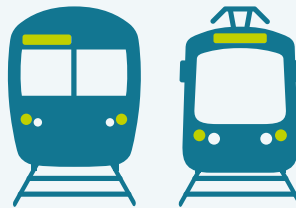


Enterprise Car Club



33%

of car club members use a bicycle at least once a week, compared to a national average of 15% in England



66%

of car club members use a train or tram at least once a week, compared to a London-wide average of 16%

For most members, car clubs do not compete with public transport. This is evidenced by the 59% of survey respondents who stated that, since joining the car club, their use of public transport has stayed the same. 9% even claimed that their use of public transport has increased, either a little (4%) or a lot (5%). 21% stated that their use of public transport has

decreased a little since joining a car club, whilst for 7% it has decreased a lot. 5% said they didn't know. The net decrease in public transport use of 19% among survey respondents compares to a London-wide decrease in public transport use by 35% between pre-pandemic (2019/20) and post-pandemic (2021/22) levels.⁴

¹ Requested from National Travel Survey, NTS0313 for London

² NTS0312 for London

³ NTS0313 for London

⁴ [Travel in London Report 15 \(tfl.gov.uk\)](https://tfl.gov.uk), Table 7.1

Environmental benefits of car clubs

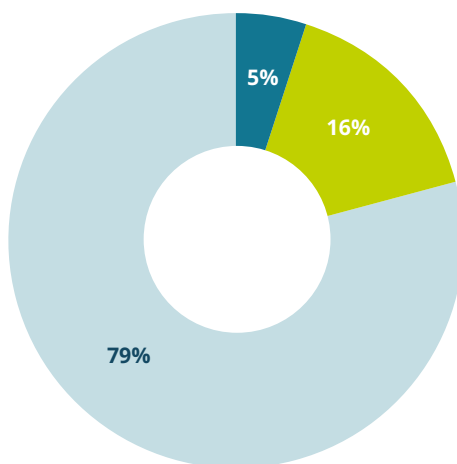
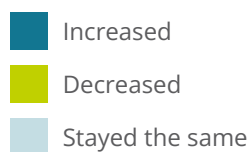
Reducing space required for cars

Car clubs replace privately owned cars with a much smaller number of more efficiently used vehicles, freeing up over 116 hectares, or 162 football pitches, of street space for other uses across London (see below for details).

Overall, 72% of car club members said that their household does not have access to a privately owned car (including company cars). Only 7% said that they had access to more than one privately owned car.

When asked about changes in car ownership, 16% of respondents stated that the number of cars in their household had decreased since joining the car club. Of these respondents, 12% claimed that their household had disposed of more than one car since joining, whilst the other 88% had disposed of one car. 79% of survey respondents experienced no change in the number of cars in their household. 5% of respondents stated that the number of cars in their household increased since they had joined the car club.

Change in number of cars in household since joining car club



16%

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



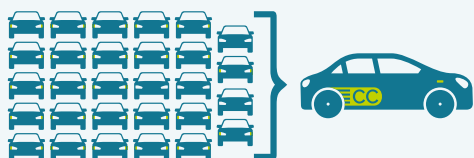
25%

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

We estimate that, in 2022, each car club vehicle in London replaced around 29 private cars. This is up from 24 replaced private cars per London car club car in 2021.¹ We arrive at this number by averaging the net car loss of our survey respondents² across our entire sample. This indicates that, in 2022, on average, each car club member disposed of 0.41 cars since joining the car club. Projected to all 245,632 individual active car

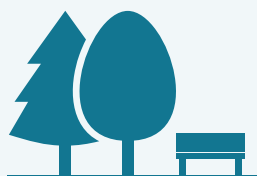
club members in London, this equals a reduction of 100,645 vehicles, or a reduction of 29 cars per car club vehicle currently in operation.

This reduction in private cars would free up almost 116 hectares of space across London. This is the equivalent of more than 162 football pitches or bigger than six times the area of Green Park.



29

In 2022, on average, each car club vehicle in the UK replaced 29 private cars



116 ha

Car reduction by car clubs frees up the space of 116 hectares, or more than 6 Green Parks

"We are a 2 adult, 2 children household. Only I have a driving licence. The combination of excellent Inner London public transport and car clubs, combined with parents/family being generally a tube/train ride away, has meant we could get rid of our car."

Male user, 35-44

"I think since selling our car, I have been far more mobile in terms of travelling on foot or using trains and buses."

Female user, 55-64

¹ [Car Club Annual Report London 2021](#)

² This is, the sum of all those cars that respondents said that they either sold, or deferred purchasing, since joining the car club, minus the number of respondents who said that they bought one or more cars since joining the car club. Note that this calculation does not account for increases in the number of private cars that result from car club users who bought more than one car since joining, which might lead to a slight over-estimation of car club-related car reductions.

Improving air quality

- 15% of London's car club fleet are electric vehicles. This is 3 percentage points more than in 2021. Less than 2% of all cars in the UK are currently electric.¹
- 45% of London's one-way car club fleet is currently electric.
- 100% of car club cars are compliant with low emission zones.
- 100% of car club vehicles are under 5 years and 69% are under 2 years old.
- In our survey, of the cars disposed of by members, 71% were reported to be 5 years or older, including 28% that were older than 10 years.



Zipcar

Carbon emission reductions from cleaner vehicles



From our comprehensive 2020 fleet analysis², we know that the average car club car emits 27% less CO₂ than an average car in the UK.

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. When asked to provide an estimate of the change in their monthly car mileage since joining, 30% of survey respondents indicated that, on average, they had reduced their monthly car miles (including car club, private car, taxi and hire car); 43% said that they didn't know; 16% reported no change; and 11% reported a mileage increase. The 43% saying 'don't know'

probably included many people who felt uncomfortable providing a specific estimate.

Based on this data, we estimate that, on average, each car club member has reduced their monthly car mileage by 11.5 miles.³ This would equal a yearly reduction of 138 miles. Given that, in 2021, an average person in London travelled 1,621 miles by car every year (as driver and passenger), this would represent an annual reduction in car mileage of about 9%.⁴

1 [Department for Transport: Vehicle licensing statistics: VEH0105 and VEH0141](#)

2 [Car Club Annual Report GB 2020](#)

3 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.

4 [National Travel Survey NTS9904](#)

While we acknowledge the numerous caveats to this crude estimate, the key finding is clear: car clubs can play a fundamental role in reducing car mileage and in supporting car-light lifestyles. In doing so, car clubs also help achieve policy goals such as the Mayor of London's aim for 80% of all trips to be made sustainably by 2041.¹

access to one or more private cars in their household. Similarly, 27% used a private car at least once a week. However, this compares to statistics from London overall which suggest that 41% of all daily trips were carried out by private car or taxi in 2021.²

REDUCING CAR MILEAGE



138 miles

per year is the net average car mileage reduction per car club user in London. This is equivalent to 9% of the average yearly car mileage per person in London.

30%

of survey respondents stated that, on average, they had reduced their monthly car miles since joining a car club

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. 28% of respondents had

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



27%

Private car
(driver/passenger)



14%

Taxi



11%

Private hire /
minicab

Even for car owners, the car club may be allowing them to avoid owning a second or third car which could have led to higher mileage. Of those respondents who disposed of one or more cars since joining the car club, 53% claimed that they had reduced their monthly car mileage (compared to 30% in the overall sample). 14% of those respondents who reduced the number of cars in their household even stated that they reduced their monthly mileage by more than 100 miles.



Hiyacar

¹ [TfL: The Mayor's Transport Strategy](#)

² [Travel in London Report 15 \(tfl.gov.uk\)](#), Table 2.1

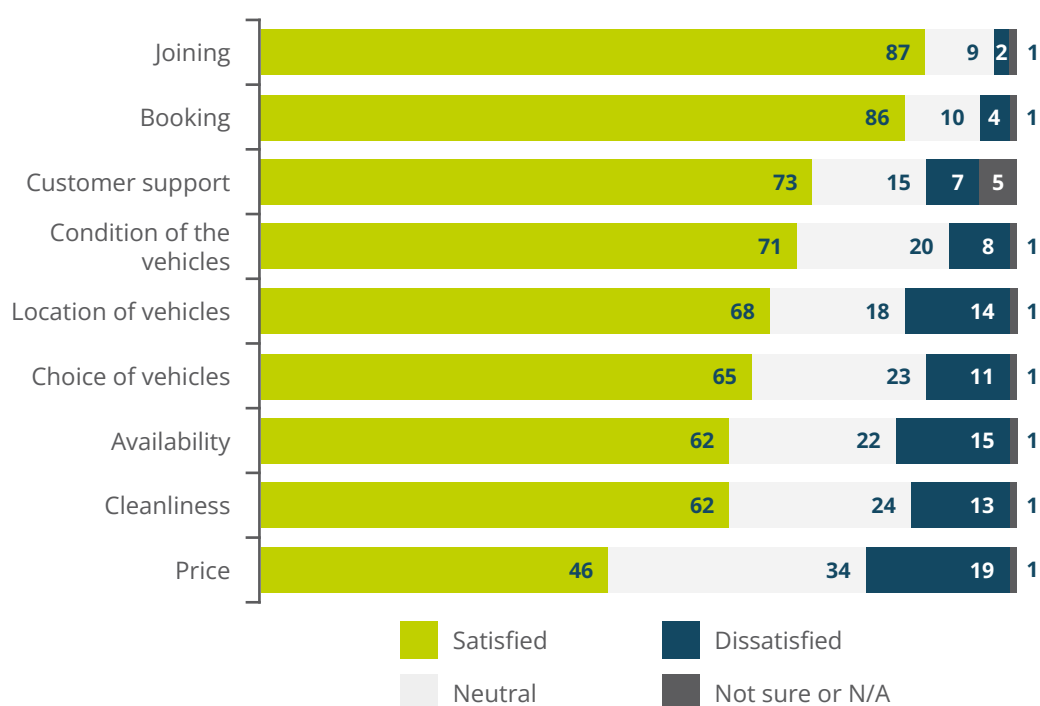
Customer satisfaction

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 most aspects of the services, from the joining process (87%), to making a booking (86%), customer support (73%) and the condition of vehicles (71%). Fewer people were happy with the cleanliness and availability of vehicles (both 62%). The only aspect with which the majority was not satisfied or very

satisfied was price. However, even with this aspect, only 19% claimed to be dissatisfied or very dissatisfied.

Compared to our 2021 survey, user satisfaction averaged across all aspects of the service (as measured by the share of satisfied or very satisfied users) has increased by 8 percentage points, with particularly large increases in satisfaction relating to location and availability of vehicles.

Customer satisfaction (values in %)



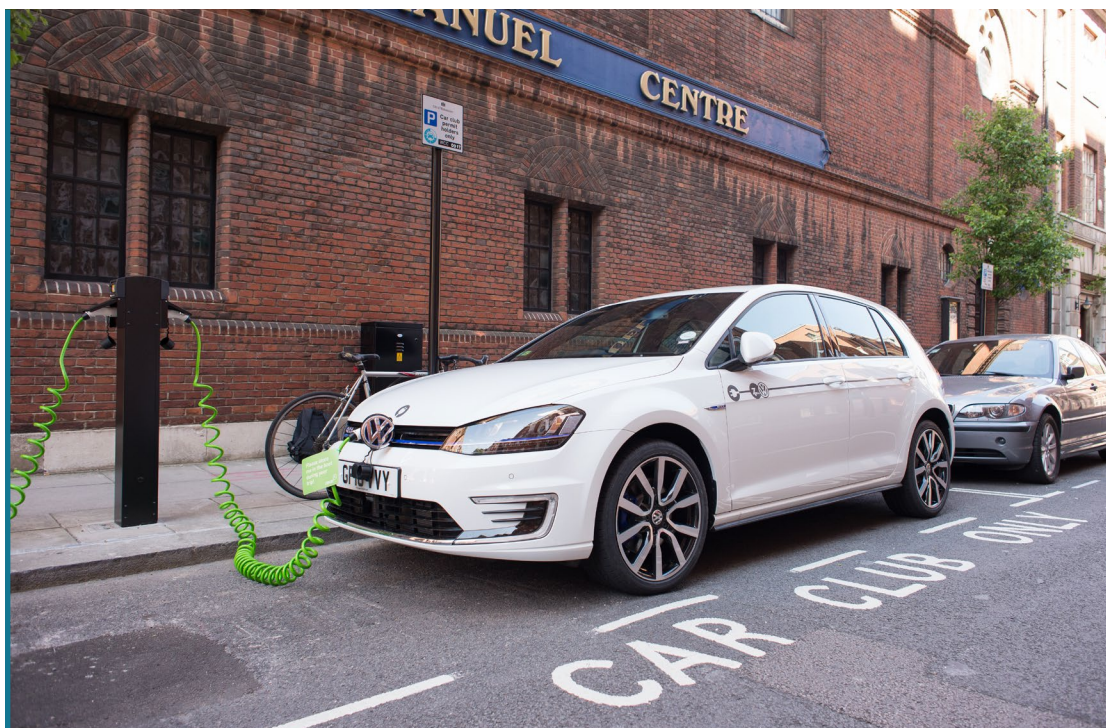
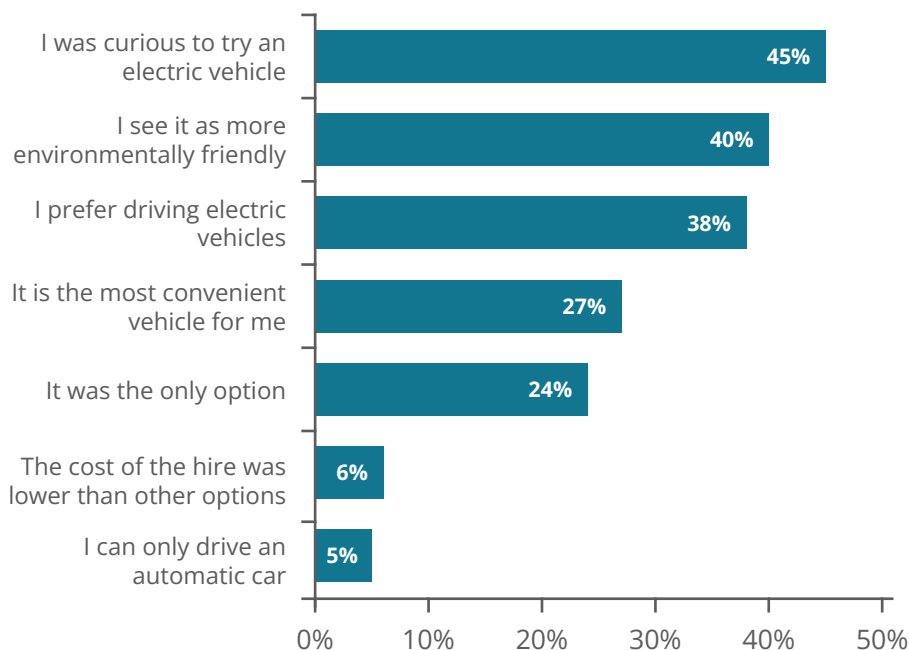
Co Wheels

Electric car adoption

47% of respondents had used a fully electric car club vehicle. This is a significant increase from the 39% who had done so in 2021. In the same period, the share of electric cars within London's car club fleet has grown from 12% to 15%.

When asked about their reasons for using an electric car, in a question where multiple options could be chosen, 45% of electric car users said they were curious to try one, 40% were keen to be more environmentally friendly and 38% stated that they preferred driving electric vehicles.

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



Zipcar

Of those respondents who had not hired an electric vehicle, 49% said (in a question with multiple answer options) that they had not done so because there were none available in their area, 31% said that there were no electric vehicles available when they tried to book them, 18% were concerned about charging, and 13% 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.

For those who had used them, satisfaction levels with electric vehicles were generally high. 91% said they were satisfied or very satisfied with driving an electric car. 73% were satisfied or very satisfied with the mileage range, 72% with the instructions that they received from car club operators and 70% with the charge level at the point of pick up.

The proportion of customers reporting that they were satisfied with charging the cars at the end of a hire (31% satisfied or very satisfied) or mid-hire (26% satisfied or very satisfied) was lower, but this is partly because many indicated that questions about charging did not apply to them or that they were not sure.

Almost three-quarters of respondents who had used an electric car club vehicle (71%) said that they didn't charge the vehicle during or at the end of a hire. This reflects the fact that the largest car club in London does not require car club members to charge electric cars themselves. Of the survey respondents who did charge electric car club vehicles in London, 59% used dedicated car club bay charge points.

Until April 2023, Government funding was not available for charging infrastructure that would be used on any exclusive basis by car clubs. CoMoUK is pleased that it has been listened to and that this position has now been changed, so that authorities can bid for funding for infrastructure that will be used by car clubs.

"Big fan of electric cars since I was a child & I could never afford such a vehicle. So having a way to drive one was like a dream come true and to get to use one now whenever I get the urge."

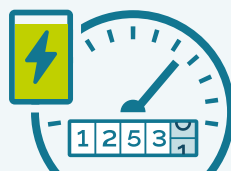
Male user, 35-44



91%



of respondents were satisfied with driving the electric car club vehicles



~3/4



Almost ¾ of respondents were satisfied with electric vehicles' mileage range and instructions received from operators

Data, contacts and further information

The CoMoUK Car Club Annual Report 2022 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.



Co Wheels



Zipcar

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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 [@Como_UK](https://twitter.com/Como_UK)

Published: June 2023

CoMoUK is a registered charity in England and Wales (no. 1093980) and Scotland (no. SC044682)



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