

CoMoUK Annual Car Club Report

UK

2022



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2022

CAR CLUB MEMBERS



752,560 members

↑ 113% (2019 = 353,726 members)

FLEET SIZE



5,926 vehicles

↑ 2% (2021 = 5,806 vehicles)

LOW CAR LIFESTYLES



70%

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

REDUCING PRIVATE CAR OWNERSHIP



22

In 2022, on average, each car club vehicle in the UK replaced 22 private cars

FREEING UP PUBLIC SPACE



150 ha

150 hectares, or land equivalent to the area of Hyde Park, was freed up across the UK by the car reduction due to car clubs

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



42%

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



38%

of respondents said they used the service for carrying bulky items



49%

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



22%

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

SUSTAINABLE TRAVEL CO-BENEFITS



37%

of car club members were using a bicycle at least once a week, while in 2021, only 15% of people in England cycled once a week or more on average



76%

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 and 43% were using a train or tram at least once a week, compared to a national average in England of 16% and 5%.



26%

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



73%

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



34%

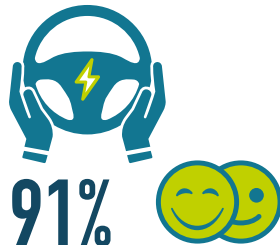
of car club members said that saving money was a reason for joining the car club

ELECTRIC CARS



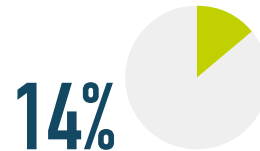
42%

of survey respondents had used a fully electric car club vehicle



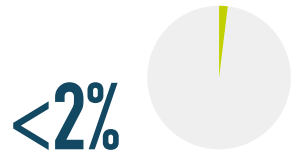
91%

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



14%

of the car club cars in the UK are electric



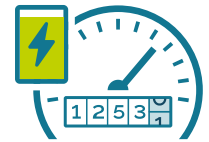
<2%

of private cars in the UK are electric



69%

of users were satisfied or very satisfied with the charge level at the point of pick up



68%

of users were satisfied or very satisfied with the mileage range

FUEL TYPE



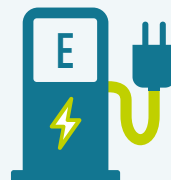
52%

Petrol



19%

Petrol hybrid



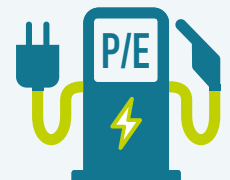
14%

Electric



14%

Diesel (vans only)



1%

Plug-in hybrid

CLEANER AND SAFER

<5 YEARS



~100%

of cars are under 5 years

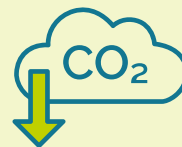
<2 YEARS



58%

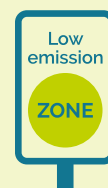
of cars are under 2 years old

CARBON EMISSIONS



27%

lower carbon emissions from car club vehicles in the UK 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 2022, the latest in our long-running series of insights into car club use and its social, ecological and economic impacts in the UK. 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 reassuring to see that car clubs continue to provide accessible and affordable access to cars for those journeys when they are needed, alongside boosting users' public transport, walking and cycling use and cutting the number of privately owned cars. This set of co-benefits is increasingly recognised in policy by governments, which is very welcome to see.

73% of 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 more efficiently used vehicles. We estimate that, in 2022, each car club vehicle in the UK replaced around 22 private cars.

Across the UK, this equals a reduction of 130,442 vehicles that, if parked next to each other, would take up 150 hectares of land – an area bigger than the size of Hyde Park.

In our [Driving London Forward](#) and [Understanding users and non users of shared transport in Scotland](#) reports we demonstrate the enormous future potential of car clubs and the related social and environmental benefits.

Car clubs also pioneer the UK's transition towards electric vehicles. 14% of the UK's car club cars were electric vehicles in 2022, compared to just under 2% of the UK's overall car fleet.

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

Richard Dilks
Chief Executive, CoMoUK



Enterprise Car Club

Introduction

This UK 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 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 UK operators (Zipcar, Enterprise Car Club, Ubeeqo, Co Wheels, Co Cars and the car club section of Hiyacar).

The data was collected in two parts:

- A car club members' survey, which was completed by 8,432 respondents from all four UK nations, 6,659 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, 6,659 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

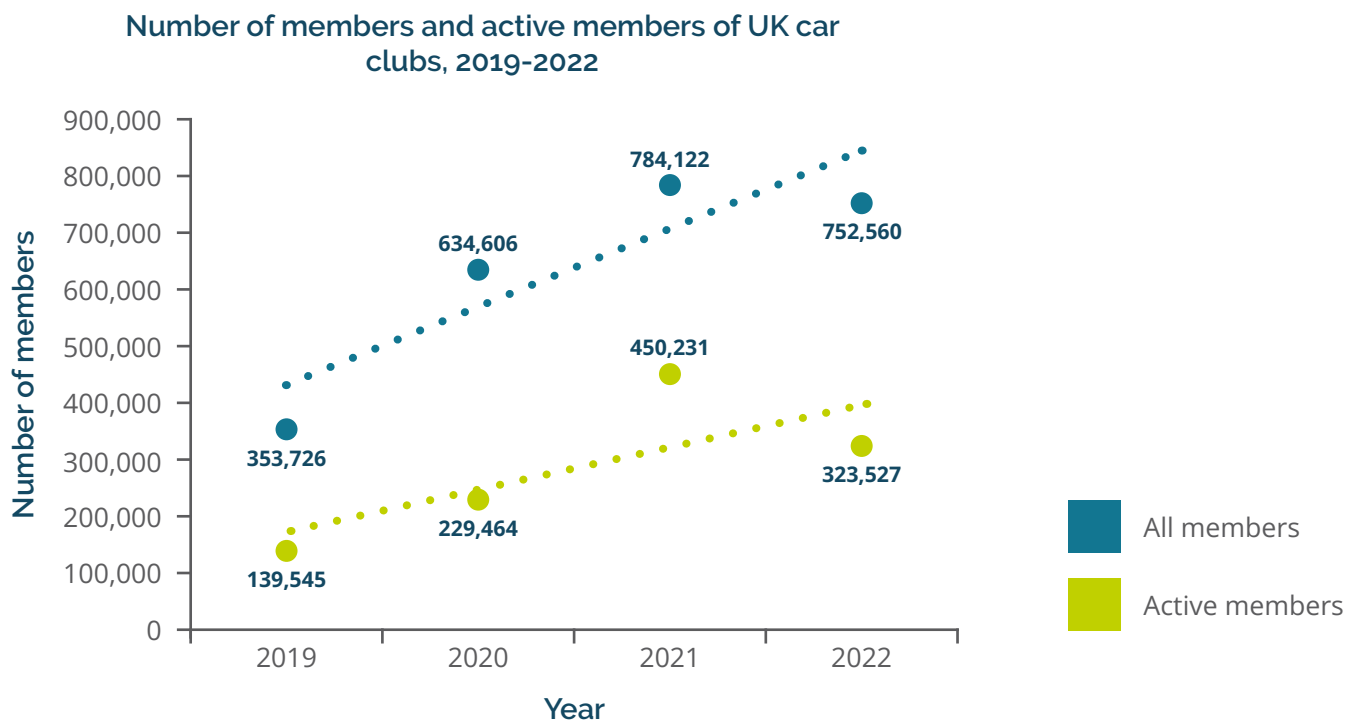
According to operator data, membership of car clubs in the UK has more than doubled since before the Covid-19 pandemic. By October 2022, the total number of car club members was 752,560 – an increase of 113% compared to 2019.

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 323,527, with 259,171 in London and 64,356 in the rest of the UK. This includes 304,054 individual active members and 19,473 corporate

active members.

While the number of active members has decreased compared to 2021, it has grown by 132% compared to active membership pre-pandemic (2019), and, as shown in the graph, there has been clear long-term growth.

In 2022, 88% of all car club members were individuals, whilst 12% were corporate memberships. Of active members, 94% were individual members and 6% were 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, 29% stated that they had joined the car club that they use most often in 2022, 17% in 2021, and 11% in 2020. 39% had joined before 2020, and 5% stated that they did not remember when they joined. This means that our sample

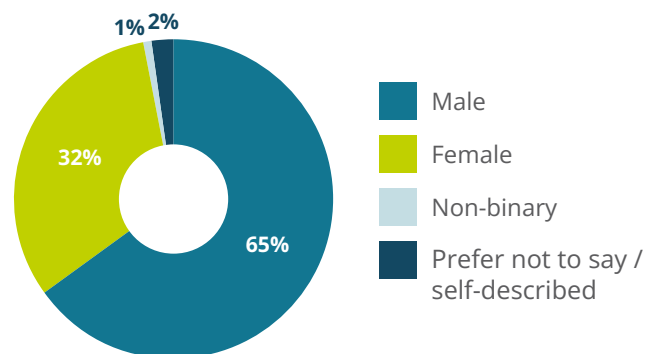
represents the views of newer, as well as of more experienced car club members.

9% of survey respondents hadn't used the car club in the last 12 months. Among these people, the largest number of respondents (58%) said they just haven't needed the service, whilst 26% said that they were only car club members as a back-up. Vehicles not being close enough, costs and changes in personal circumstances were the other reasons chosen. Respondents could choose more than one answer to this question.

Membership demographics

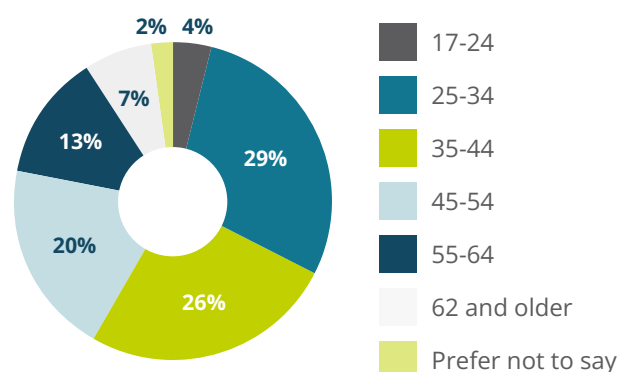
Gender

65% of respondents to the survey identified as male, whilst 32% 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



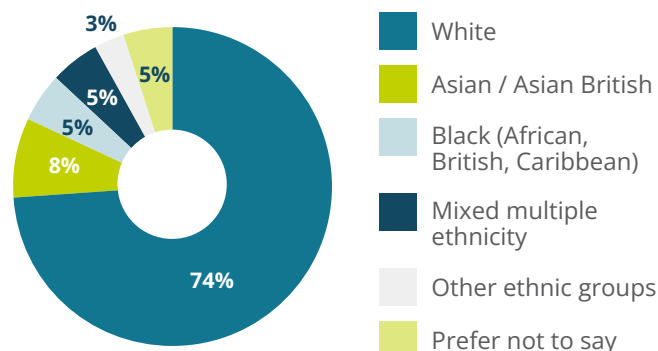
Age

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



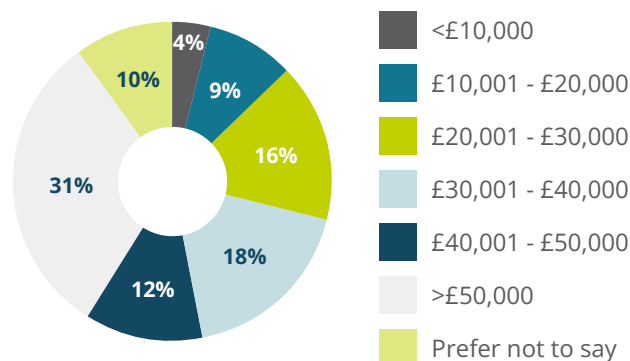
Ethnicity

In terms of ethnic background, 74% of respondents identified as white, 8% as Asian, 5% as black and 5% identified with mixed or multiple ethnic groups. 3% said that they identified with another ethnic group, whilst 5% preferred not to answer this question. According to the 2021 Census, equivalent figures for England and Wales were 82%; 9%; 4%; 3% and 2% respectively.² This suggests that car clubs are attracting a relatively diverse group of users, compared to Britain's general population.



Income

When asked about personal income levels, there was a concentration of respondents in higher income brackets, with 31% of respondents claiming that their gross annual income is more than £50,000. At the same time, 29% of respondents stated that their gross annual income is £30,000 or less.



¹ [National Travel Survey NTS0201](#)

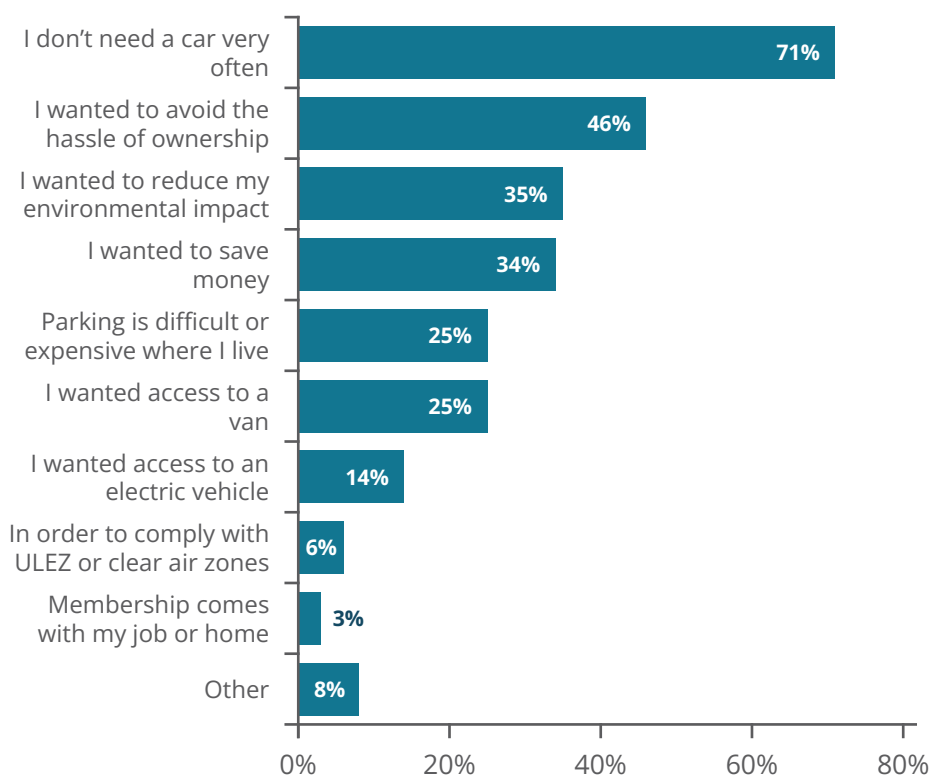
² [Ethnic group, England and Wales - Office for National Statistics \(ons.gov.uk\)](#)

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. Almost three quarters of respondents (71%) 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 (46%), followed by wanting to reduce their personal environmental impact (35%). 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 a quarter wanted access to a van.

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

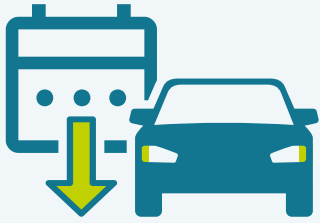


"I don't need to drive often and I love not having to deal with all the hassle and costs that come with owning a car. Plus, the hybrid and electric cars are so nice to drive."

Female user from England (city unknown),
35-44



Hiyacar



71%

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

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 (19% of the overall sample), 73% 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, 70% estimated that they were saving at least £50 a month.

"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

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

Female user from Edinburgh, 45-54



Ubeevo



34%

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



73%

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

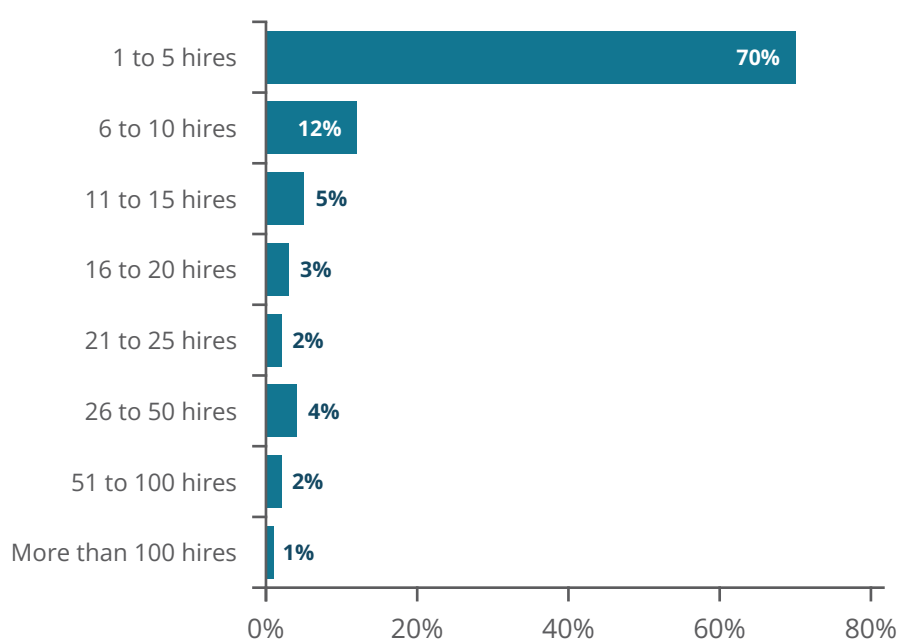
Trip purpose

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

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

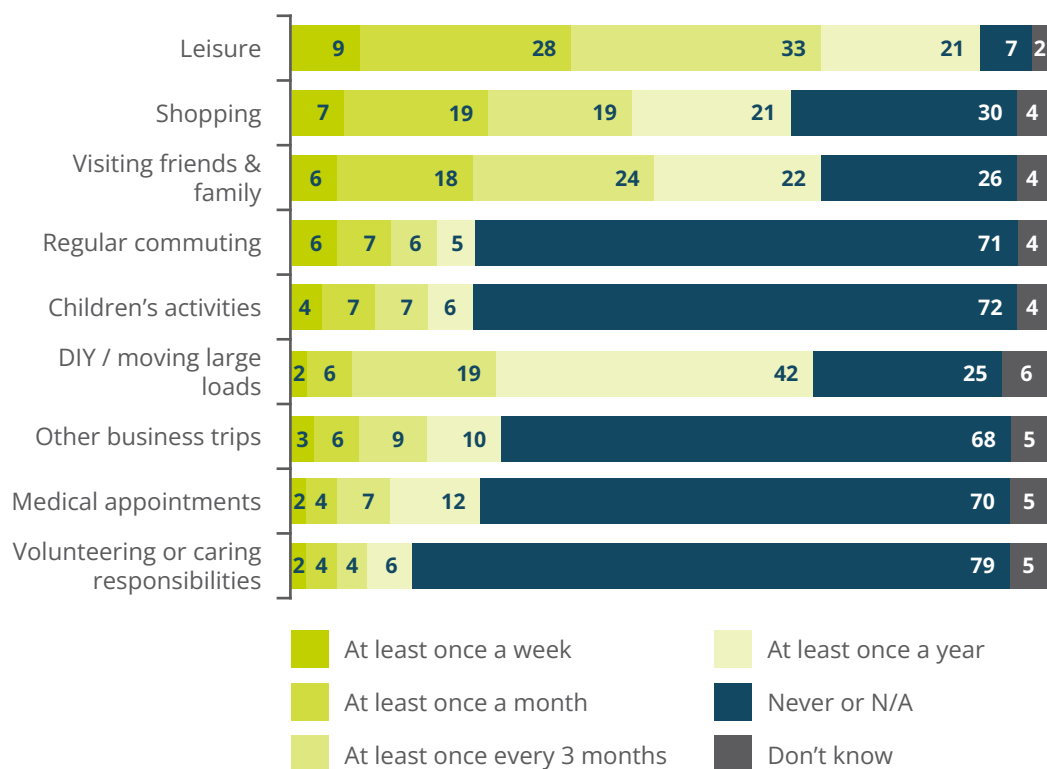
There is also evidence showing that car club members generally use cars less frequently after joining. When asked how often they were travelling in any kind of car or van (either car club vehicle, private car, taxi or hire car), 49% of respondents stated that they used a car at least once per week before 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 use car

clubs at least once a month is leisure, followed by shopping. For leisure, 9% of respondents are using car clubs at least once a week and another 28% are doing so at least once a month. For shopping, 7% of respondents are weekly users and 19% are doing so at least once a month.

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 %)



Enterprise Car Club



37%

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



26%

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

Journey profile

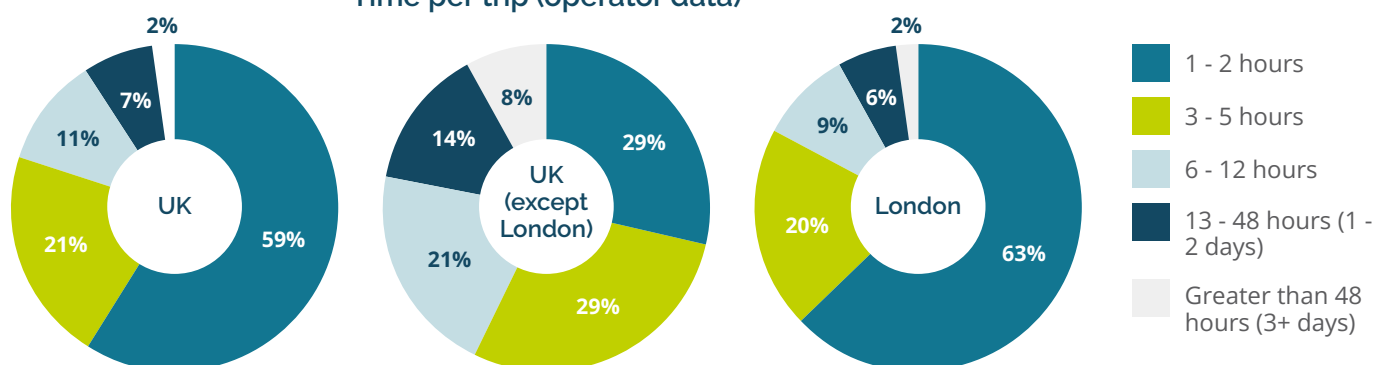
Length of hire in time

Operator data shows that car clubs are predominantly being used for shorter trips. 59% of hires only last between 1 and 2 hours, whilst 21% last between 3 and 5 hours. Especially in London that accounts for 89% of all car club trips, journeys under 2 hours dominate (63%). In the rest of the UK, the duration of car club hires is more

evenly split between short, medium and long-term rentals.

Against this backdrop, it is important to note that the average car trip for drivers in England was only 19 minutes in 2021. For car trips undertaken as a passenger, the average trip length was 21 minutes.¹

Time per trip (operator data)



Length of hire in distance

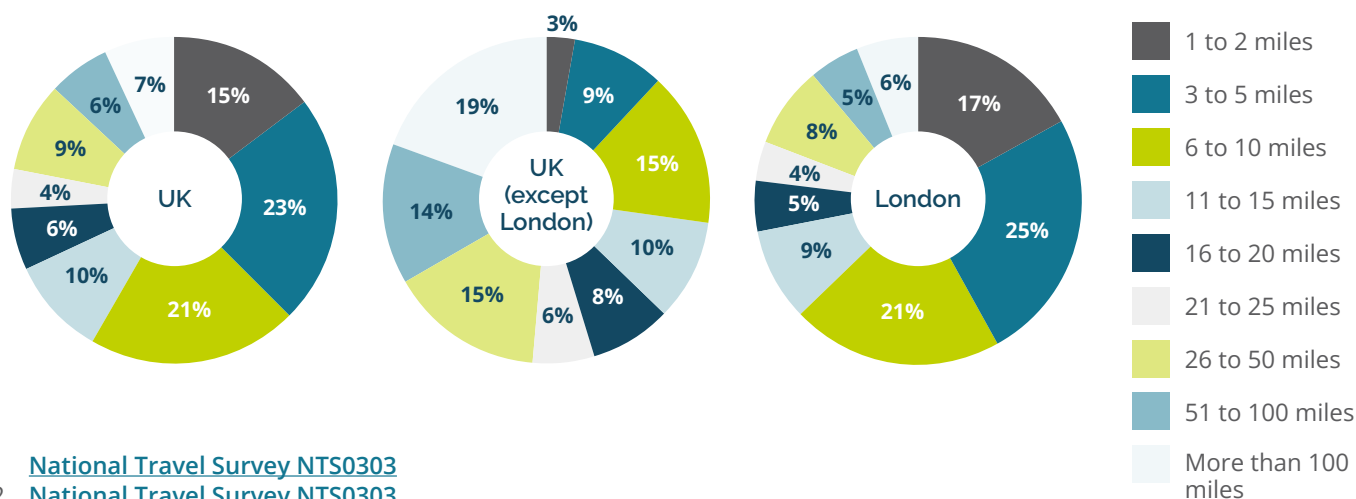
The average distance driven per car club hire in the UK is 24.9 miles. This number is based on operator data, taking the midpoint of each distance range in the graph below (assuming a midpoint of 150 miles for the last category) and multiplying by the number of trips in each distance range.

59% of trips are only up to 10 miles long. Again, there is a marked difference in the

journey profile between London and the rest of the UK. Outside London, only 28% of all car club hires are up to 10 miles; whilst in London, this percentage amounts to 63%.

The average distance of car trips undertaken as a driver in England overall was 7.4 miles in 2021; for car trips undertaken as a passenger, the average distance was 8.2 miles.²

Distance per trip (operator data)



¹ [National Travel Survey NTS0303](#)

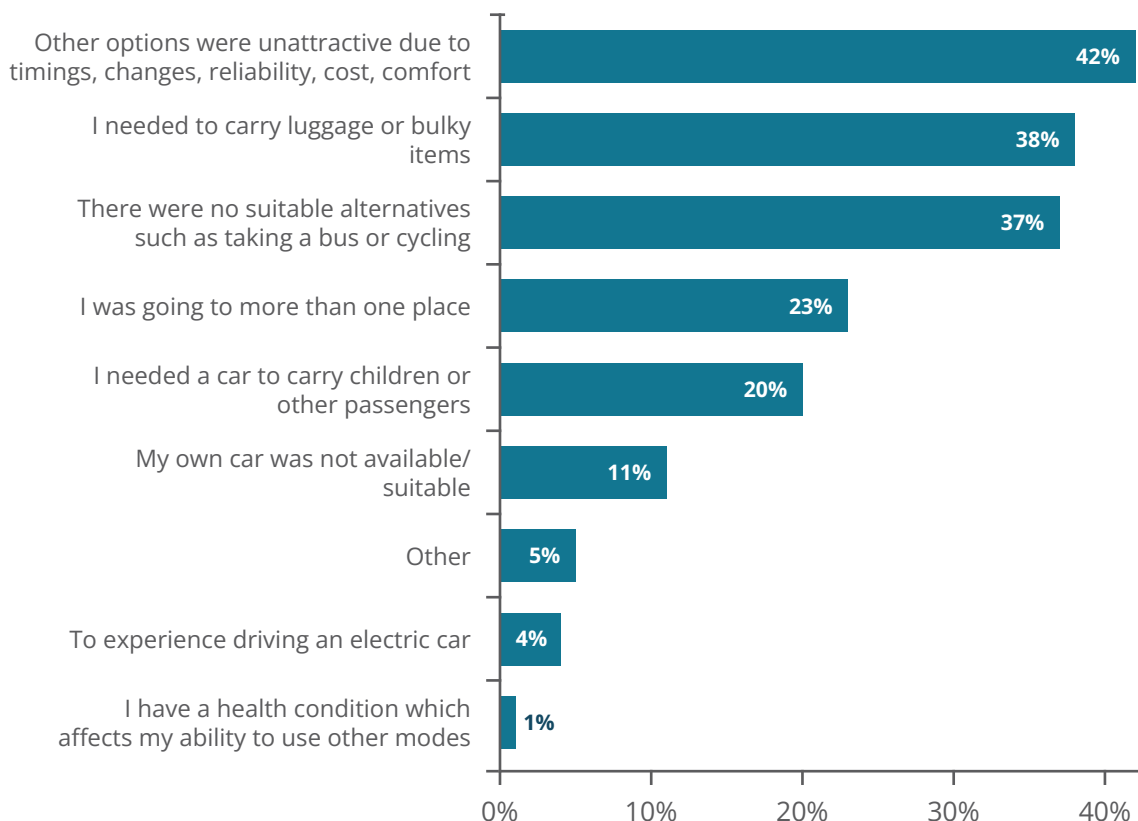
² [National Travel Survey NTS0303](#)

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 (42%), that respondents needed to carry luggage or bulky items (38%), or that there were no suitable alternatives such as taking a bus or cycling (37%).

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



Co Cars

"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

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



42%

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

"I usually travel for work by bike and public transport. Some places would take too long or are hard to access on public transport and sometimes I need to carry equipment that would be difficult on bike/bus/train. On these occasions, a car club hire is ideal."

Male user from Leeds, 35-44

"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



Co Wheels

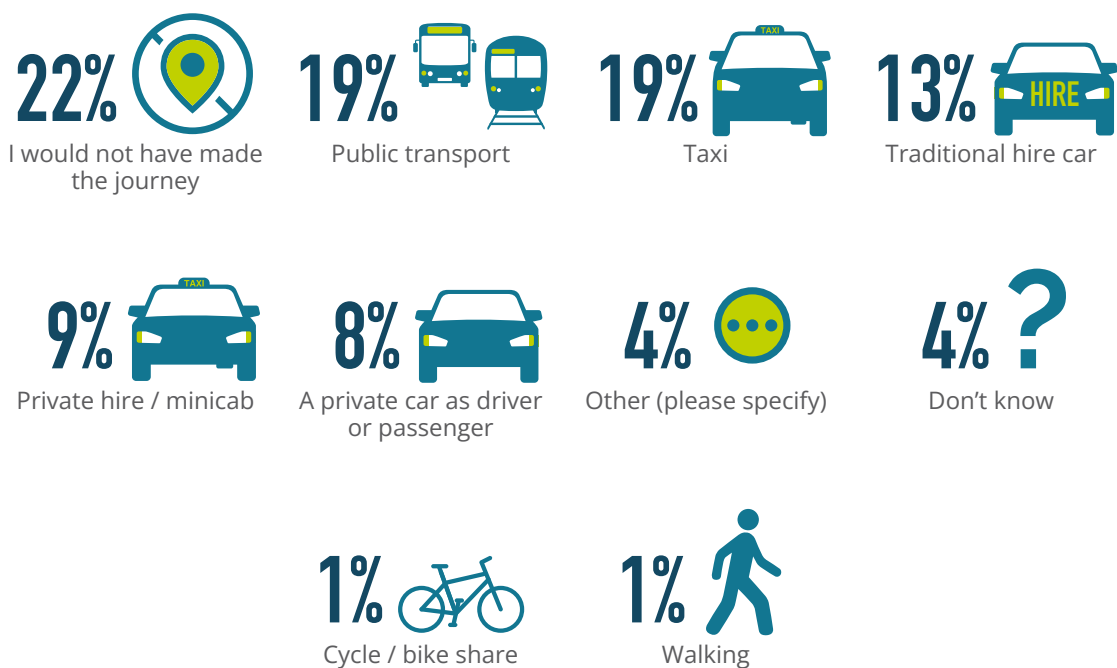
Modal switch

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, 22% said they would not have been

able to make the trip. Another 49% stated they would have used another form of car – either a taxi (19%), traditional hire car (13%), a private hire car or minicab (9%) or a private car (8%). 19% said they would have used public transport and only 2% would have walked or cycled. 8% said either that they didn't know or chose other.

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)



49%

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



UbeeGo

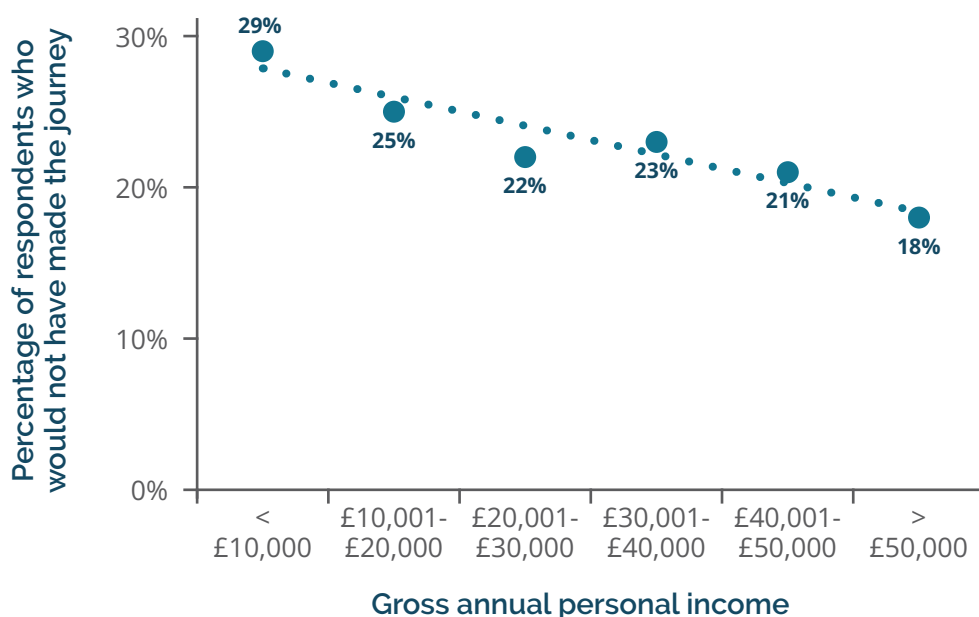
Inclusivity and accessibility

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. 26% 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 all respondents, stated

that they would not have made their last trip without a car club car. This compares to 21% of respondents without a lasting health condition.

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.

Percentage of respondents who would not have made their last journey without a car club by income bracket



LEAP Car Club



26%

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

"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

"It has allowed us as a family that could not afford the cost of car ownership to have access to a car and do things like big food shops at the supermarket and take children to sporting activities."

Male user from Poole, 35-44

"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



Zipcar

Sustainable travel habits

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

- 76% of car club members were walking at least once a week for travel (i.e. not for leisure). For the English population as a whole, 78%, walked for at least 20 minutes once a week or more often in 2021. However, this latter number also includes walks for leisure. 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.¹
- 37% were using a bicycle at least once a week. In 2021, only 15% of people in England cycled once a week or more on average.²
- 48% of respondents were using a bus at least once a week and 43% were using a train or tram at least once a week. This compares to a national average in England of 16% and 5%, respectively, in 2021.³



37%

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



48%

of car club members use a bus at least once a week, compared to a national average of 16% in England

"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

"Great experience driving through Ambleside having travelled to Windemere by train and picked up the car club car at the station."

Male user from Henley-on-Thames, 65-75

For most members, car clubs do not compete with public transport. This is evidenced by the 59% of survey respondents who state that, since joining the car club, their use of public transport has stayed the same. 13% even claim that their use of public transport has increased, either a little (7%) or a lot (6%). 17% state that their use of public transport has decreased a little since joining a car club, whilst for 6% it has decreased a lot. 5% said they didn't know.

¹ [National Travel Survey NTS0312](#)

² [National Travel Survey NTS0313](#)

³ [National Travel Survey NTS0313](#)

Environmental benefits of car clubs

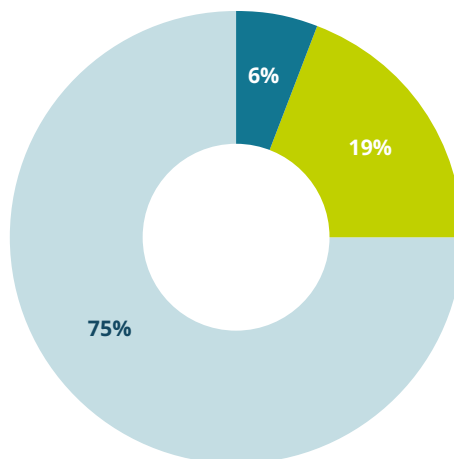
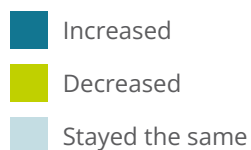
Reducing space required for cars

Car clubs replace privately owned cars with a much smaller number of more efficiently used vehicles, freeing up 150 hectares, or an area bigger than Hyde Park, of street space for other uses across the UK (see below for details).

Overall, 67% of car club members said that their household does not have access to a privately owned car (including company cars). Only 9% said that they had access to more than one privately owned car.

When asked about changes in car ownership, 19% of respondents stated that the number of cars in their household had decreased since joining the car club. Of these respondents, most (92%) had disposed of one car, with only 8% claiming that their household had disposed of more than one car since joining. 75% of survey respondents experienced no change in the number of cars in their household. 6% of respondents stated that the number of cars in their household had increased since they had joined the car club.

Change in number of cars in household since joining car club



19%

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



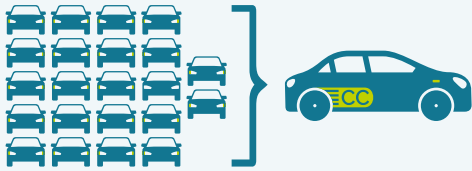
27%

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 the UK replaced around 22 private cars. We arrive at this number by averaging the net car loss of our survey respondents¹ across our entire sample. This indicates that, on average, each car club member disposed of 0.43 cars since joining the car club. Projected to all 304,054 individual active car club members in the UK, this equals a reduction of 130,442

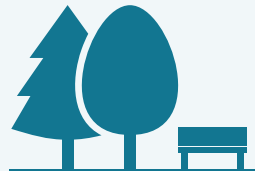
vehicles, or a reduction of 22 cars per car club vehicle currently in operation.

This reduction in private cars would free up more than 150 hectares of space across the UK. This is the equivalent of almost 210 football pitches or more than the area of Hyde Park in London.



22

In 2022, on average, each car club vehicle in the UK replaced 22 private cars



150 ha

Car reduction by car clubs frees up the space of 150 hectares, an area bigger than Hyde Park

"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

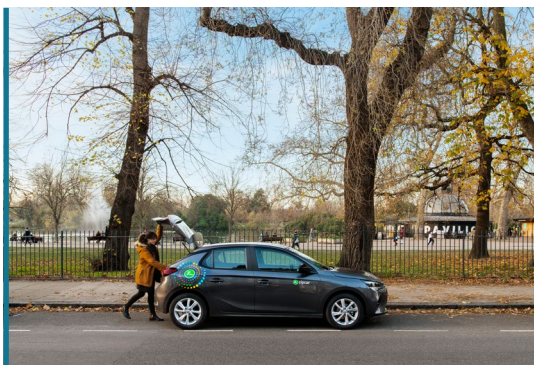
"We've got rid of two cars and we've never looked back."

Male user from Edinburgh, 25-34

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 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

- 14% of the UK's car club fleet are electric vehicles. This is 2 percentage points more than in 2021. Less than 2% of all cars in the UK are currently electric.¹
- 100% of car club cars are compliant with low emission zones.
- Almost 100% of car club vehicles are under 5 years and 58% are under 2 years old.
- In our survey, of the cars disposed of by members, 72% were reported to be five years or older, including 32% 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, 32% of survey respondents indicated that, on average, they had reduced their monthly car miles (including car club, private car, taxi and hire car); 39% said that they didn't know; 19% reported no change; and 12% reported a mileage increase. The 39% 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 survey respondent has reduced their monthly car mileage by 14 miles.³ This would equal a yearly reduction of 170 miles. Given that, in 2021, an average person in England travelled 3,483 miles by car every year, this would represent an annual reduction in car mileage of about 5%.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](#). Combined data for car driver, car passenger and taxi/minicab use

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 Scottish Government's goal to reduce driven car kilometres by 20% by 2030,¹ or the Mayor of London's aim for 80% of all trips to be made sustainably by 2041.²

REDUCING CAR MILEAGE



170 miles

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

32%

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. One third (33%) of respondents had access to one or more private cars in their household. Similarly, 31% used a private car at least once a week.

However, this compares to national data from England that suggests that 82% of the population travelled by private car at least once a week in 2021, including 61% who used the private car at least three times a week.³

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



32%

Private car
(driver/passenger)



7%

Taxi



4%

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, 58% claimed that they had reduced their monthly car mileage (compared to 32% in the overall sample). 19% 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.

¹ [Transport Scotland: 20% reduction in car km by 2030](#)

² [TfL: The Mayor's Transport Strategy](#)

³ [National Travel Survey NTS0313](#)

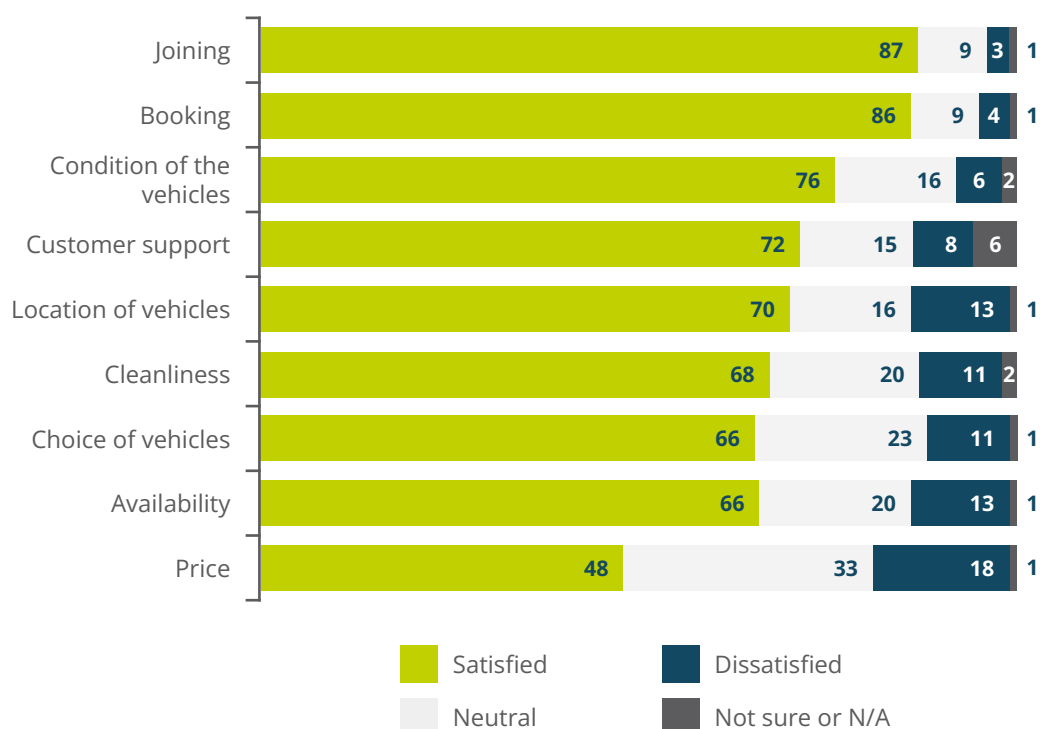
Customer satisfaction

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%), and the condition of vehicles (76%). Fewer people were happy with the choice and availability of vehicles (both 66%). The only aspect with

which the majority was not satisfied or very satisfied was price. However, even with this aspect, only 18% 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.

Customer satisfaction (values in %)



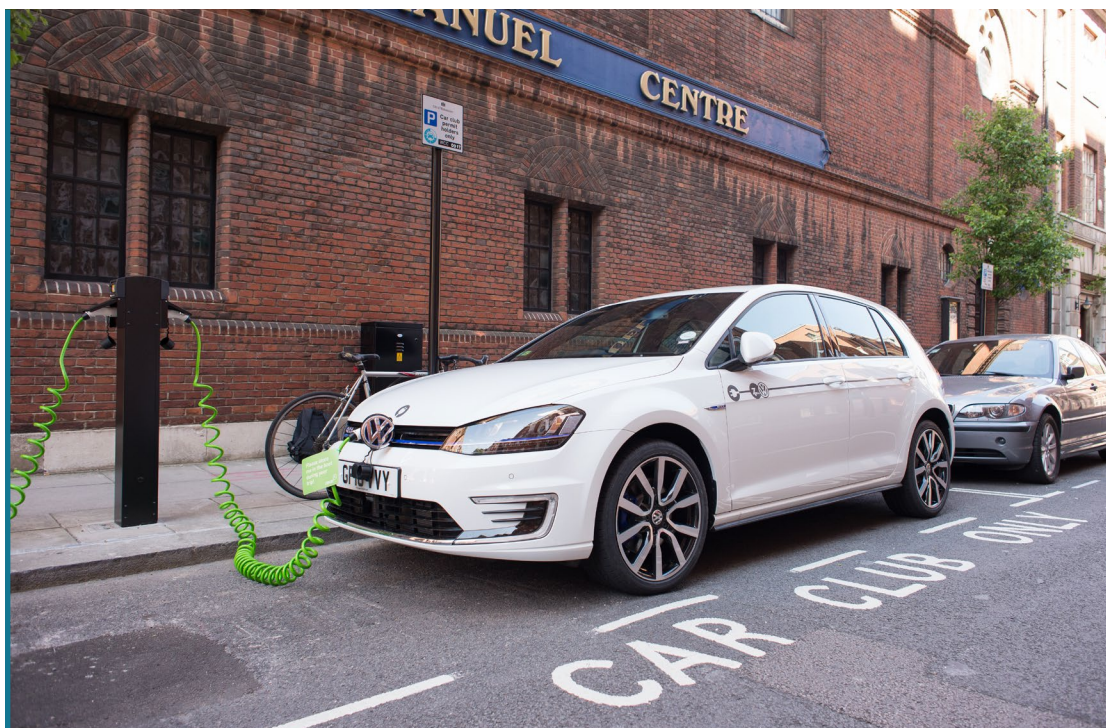
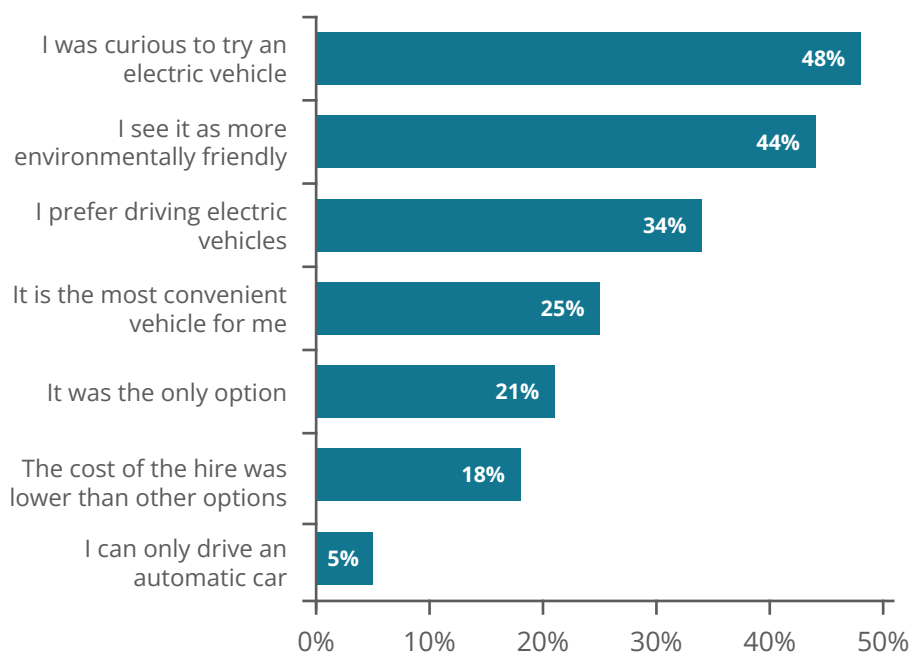
Enterprise Car Club

Electric car adoption

42% of respondents had used a fully electric car club vehicle. This is a significant increase from the 35% who had done so in 2021. In the same period, the share of electric cars within the UK's car club fleet grew from 12% to 14%.

When asked about their reasons for using an electric car, in a question where multiple options could be chosen, 48% of electric car users said they were curious to try one, 44% were keen to be more environmentally friendly and 34% 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, 48% said (in a question with multiple answer options) that they had not done so because there were none available in their area, 26% said that there were no electric vehicles available when they tried to book them, 20% were concerned about charging, and 14% 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. 71% were satisfied or very satisfied with the instructions that they received from car club operators, 69% with the charge level at the point of pick up, and 68%

with the mileage range. The proportions of customers reporting that they were satisfied with charging the cars at the end of a hire (47% satisfied or very satisfied) or mid-hire (29% satisfied or very satisfied) were lower, but this is partly because many indicated that they had not charged the vehicles. Specifically, 44% of electric car club vehicle users said that they didn't charge the vehicle during or at the end of a hire. Of those that did, 71% used dedicated car club bay charge points to charge the vehicle.

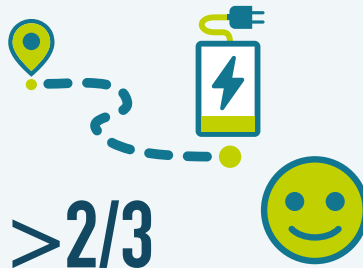
"Big fan of electric cars since I was a child & I could never afford such a vehicle. So having a way to drive one was like a dream come true and to get to use one now whenever I get the urge."

Male user from London, 35-44



91%

of respondents were satisfied with driving the electric car club vehicles



> 2/3

More than 2/3 were satisfied with charge level at pick up and the electric vehicles' mileage ranges

Data, contacts and further information

The UK 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.



Enterprise Car Club



Co Wheels

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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