

CoMoUK Annual Car Club Report

UK

2023



Contents

Key findings	3
Foreword	5
Introduction	6
Methodology	6
Car club membership	7
Membership growth	7
Membership patterns of survey respondents	8
Membership demographics	9
Motivations and benefits	10
Trip purpose	12
Journey profile	14
Duration of hires	14
Distance of hires	14
Access to vehicles	15
Reasons for car club use over other modes	16
Modal switch	17
Inclusivity and accessibility	18
Sustainable travel habits	20
Environmental benefits of car clubs	22
Reducing space required for cars	22
Mileage reduction of car club members	24
Electric cars and low emission vehicles	25
Customer satisfaction	27
Data, contacts and further information	28



CAR CLUB MEMBERS



↑ 4% on 2022

784,304 total members

299,989 of which were active, private members ↑ 5% on 2022

FLEET SIZE



5,301 vehicles

4,513 of which were publicly accessible

REDUCING CAR MILEAGE



153 miles

After joining a car club, each car club member, on average, reduces their total car mileage by 153 miles per year

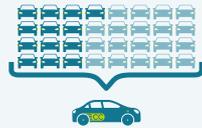
LOW CAR LIFESTYLES



74%

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

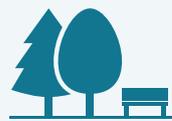
REDUCING PRIVATE CAR OWNERSHIP



14-32

In 2023, each car club vehicle in the UK replaced between 14 and 32 private cars

FREED UP PUBLIC SPACE



134 ha

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

ACCESS TO OPPORTUNITIES



28%

of car club members with a constraining health condition wouldn't be able to travel by other means for the most common trip that they use the car club for

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



50%

of respondents would not have been able to go to their destination without a car



44%

of respondents needed the car club to carry luggage or bulky items



48%

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



20%

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

SUSTAINABLE TRAVEL CO-BENEFITS



35%

of car club members were using a bicycle at least once a week (compared to 14% of English average¹)



88%

of car club members were walking for 20 minutes or more at least once a week (compared to 78% of English average²)



48%

of car club members were using a bus at least once a week (in London 62%, outside London 39%), compared national average in England of 20%³



48%

were using a train or tram at least once a week (in London 69%, outside London 31%), compared national average in England of 8%⁴

1 DfT: National Travel Survey: Mode of travel, NTS0313
2 NTS0312

3 NTS0313
4 NTS0313

CONSISTENTLY HIGH CUSTOMER SATISFACTION



90%

of survey respondents are satisfied or very satisfied with the process of joining the car club



>80%

of survey respondents are satisfied or very satisfied booking and accessing car club vehicles

COST SAVINGS



33%

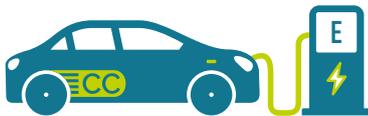
of car club members said that saving money was a reason for joining the car club



-£5,600

Using electric vehicles (EVs) through a car club can save around £5,600 p.a. compared to owning an EV¹

FLEET ELECTRIFICATION



35%

OF PUBLICLY ACCESSIBLE CAR CLUB CARS ARE ELECTRIC

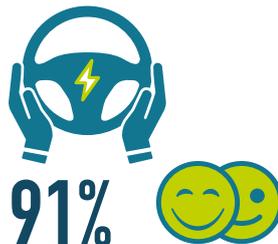
1.2%

OF PRIVATE CARS ARE ELECTRIC



49%

of car club members have used a fully electric car club vehicle (compared with 42% in 2022).



91%

of respondents were satisfied with driving electric car club vehicles



>2/3

More than 2/3 of respondents were satisfied or very satisfied with the electric vehicle's mileage range



8

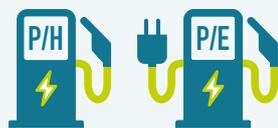
electric vans are part of the UK car club fleet

LOWER EMISSIONS AND CLEAN AIR



100%

of car club cars are compliant with Low Emission Zones



35%

of car club cars that are not fully electric are either hybrid or plug-in hybrid

<5 YEARS



~100%

of cars are under 5 years old

<2 YEARS



57%

of car club vehicles in the UK are under 2 years old

¹ CoMoUK: The costs of using a car club EV compared with owning or leasing an EV

Foreword

Welcome to the CoMoUK Car Club Annual Report for 2023, the latest in our long-running series of insights into car club use and its social, environmental and economic impacts in the UK.

In 2023, car clubs continued to spearhead the electrification of the UK's car fleet, with 35% of publicly available car club cars now being fully electric and almost half of all UK car club members having used an electric car club vehicle. Among the UK's private cars, less than 2% were EVs.

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 2023, each car club vehicle in the UK replaced around 26 private cars. In London, one car club vehicle can even make up to 32 private cars redundant!

UK car clubs provide accessible and affordable access to cars for those

journeys when they are needed to a bigger number of users. Additionally, car clubs support "car-light" lifestyles and boost members' use of public transport, walking and cycling.

Governments, local authorities and other stakeholders increasingly recognise the multiple benefits of car clubs and we were honoured to work with many of them over the course of 2023 to share our expertise on car clubs and other shared transport modes.

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

Richard Dilks
Chief Executive, CoMoUK



Co Wheels

Introduction

This UK CoMoUK Car Club Annual Report 2023 presents data collected from car club operators for the period 1 October 2022 to 30 September 2023 alongside data from our car club user survey, collected in Autumn 2023. 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 17 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, Co Wheels and the car club section of Hiyacar) and from smaller community-run car clubs.

The data was collected in two parts:

- A car club members' survey, which was completed by 12,525 respondents from all four UK nations. 8,677 respondents were active, private users as per the definition given below.
- A car club operators' survey which gathered data on operational vehicle usage.

Unless stated otherwise, this report only presents survey results from active, private users of car clubs. We define active private

users as car club members who:

- had used a car club in the 12 months prior to undertaking the survey in Autumn 2023;
- were using car clubs for private purposes (either exclusively or alongside business use); and
- were using car clubs to access passenger cars (either exclusively or alongside car club vans).

Respondents could skip some 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%.



Zipcar

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 2023, the total number of car club members, including inactive and corporate members, was 784,304 – an increase of 122% compared to 2019.

The number of active car club members¹ has also increased, and amounted to 339,017 members, with 258,570 in London and 80,447 in the rest of the UK. This UK-wide number includes 299,989 active individual members and 39,028 active corporate members.

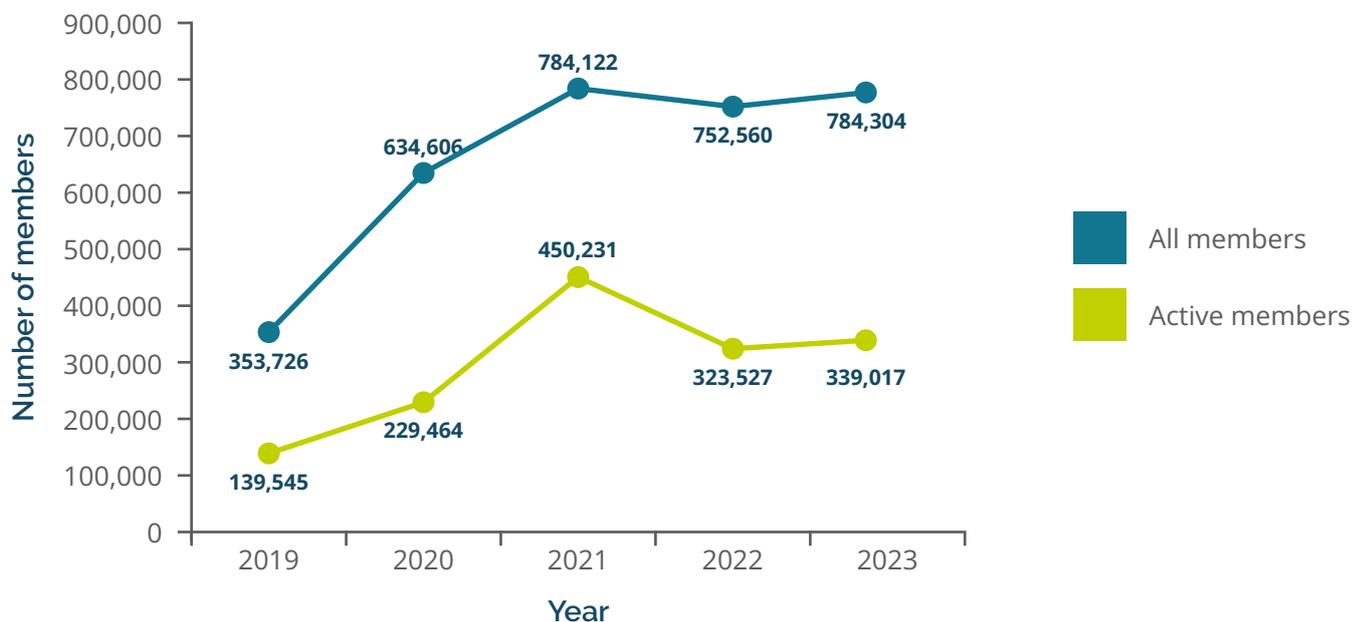
Compared to 2022, the number of all car club members has grown by around 4%, and the number of active car club members by around 5% in 2023. This indicates a small growth in car club

membership after a peak during the Covid pandemic in 2020 and 2021, and a drop in membership in 2022.

It is important to note that these figures represent total membership numbers. Some people 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.

By the end of September 2023, the UK car club fleet included 5,301 vehicles. 4,513 car club vehicles were available to the public at least part of the week, with the remaining 788 vehicles being reserved for corporate customers. The largest share of the UK car club fleet was concentrated in London, with 2,946 publicly available and 50 corporate car club vehicles being located in Greater London.

Growth in UK car club membership (2019-2023)



¹ Please note that the definition of active car club members as provided by car club operators differs slightly from the definition used for survey respondents. For operator metrics, members who have not hired a car but renewed their car club membership or made another financial commitment to the operator in the last 12 months are also considered to be active members, and the 12 month period is October 2022 to September 2023.

Membership patterns of survey respondents

Among the active, private members who completed the car club survey, 22% stated that they first joined a car club in 2023, 14% in 2022, and 11% in 2021. 7% first joined in 2020, and 40% joined in 2019 or earlier. 6% stated that they did not remember when they first joined a car club. This means that our sample represents the views of newer, as well as of more experienced car club members.

Of our total survey sample, 15% of respondents stated that they had not used a car club in the last 12 months. We define these respondents as inactive car club users for the purpose of this report.

Inactive users were asked why they had not used a car club in the 12 months before completing the survey and could choose multiple answer options. 49% indicated that they hadn't needed a car club for any journeys, 26% said that they were only car club members as a back-up, 20% stated that the car club vehicles were not close enough to where they needed them, and 19% reported that they were a new member and hadn't had the chance to use the car club yet. Pricing and changes in personal circumstances were other reasons chosen by at least one-tenth of inactive users.

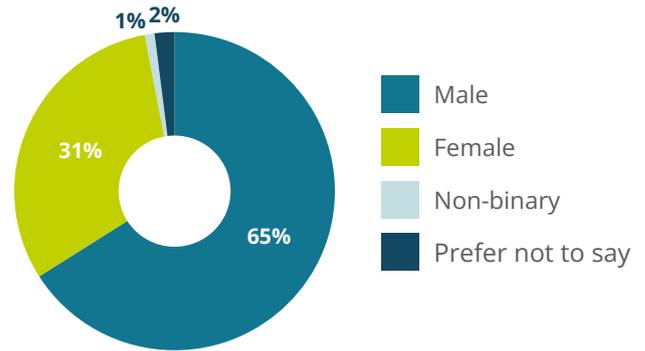


Co Wheels

Membership demographics

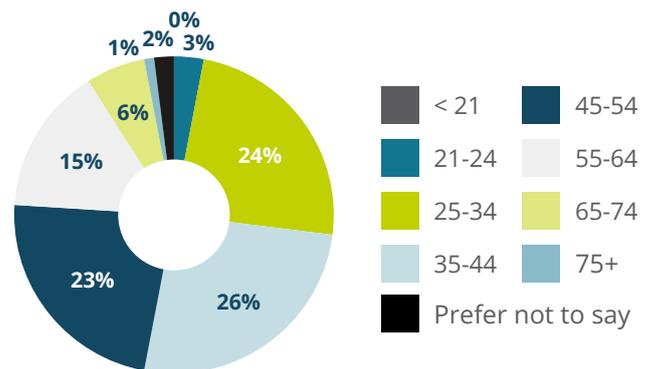
Gender

Zooming in on active, private members of car clubs, 65% of respondents to our survey identified as male, whilst 31% 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 2022, 81% of men in England aged 17 and over held a driving license, while only 71% of women did so.¹



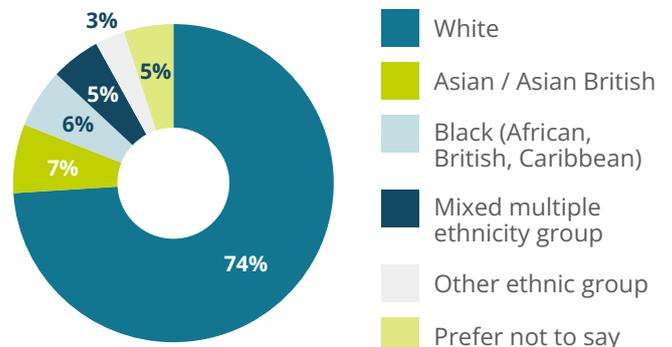
Age

Operator data indicates that 45% of all active, private car club members in the UK are between 25 and 34 years old. Our survey sample is more evenly distributed across age brackets (with 2% of respondents indicating 'prefer not to say'), as can be seen in the pie chart.



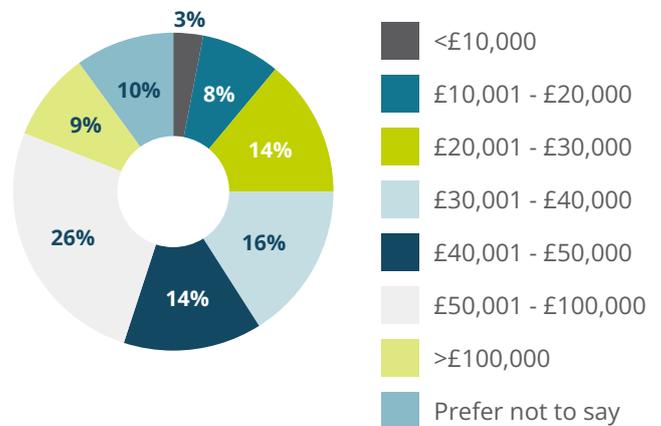
Ethnicity

In terms of ethnic background, 74% of respondents identified as white, 7% as Asian, 6% 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 survey respondents were asked about income levels, there was a concentration of respondents in higher income brackets, with 35% of respondents claiming that their personal gross annual income is more than £50,000, including 9% of respondents who stated that their personal gross annual income is more than £100,000. At the same time, 25% of respondents stated that their gross annual income is £30,000 or less.



1 [gov.uk: Driving licence holding and vehicle availability](https://www.gov.uk/government/statistics/driving-licence-holding-and-vehicle-availability), NTS0201

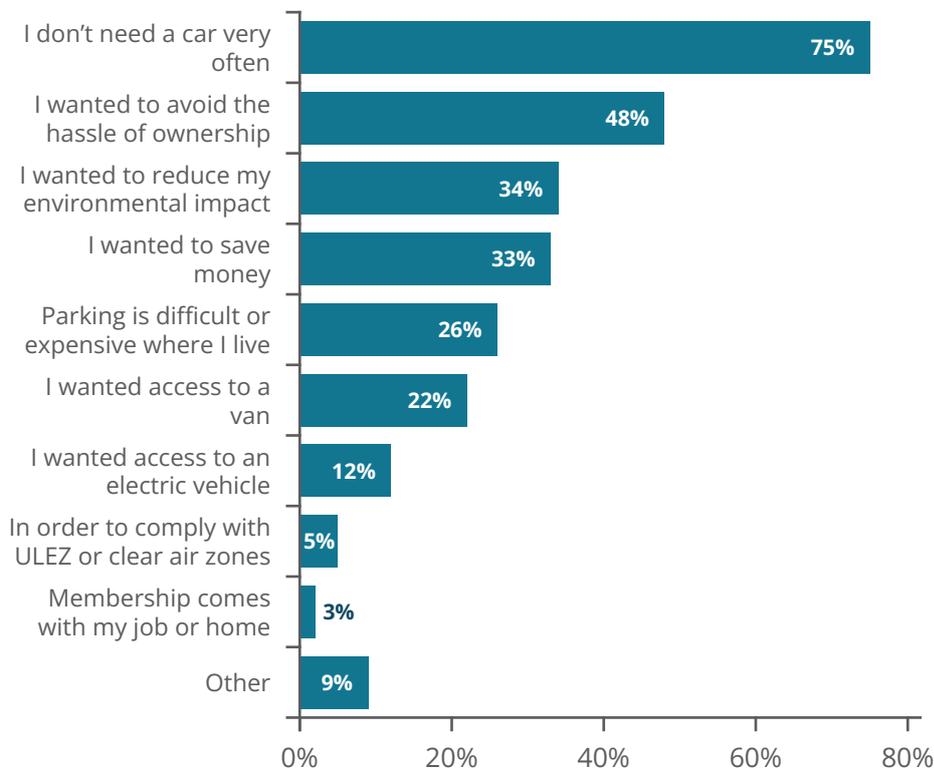
2 [Ethnic group, England and Wales - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/people-in-the-uk/ethnicity)

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. Three quarters of respondents (75%) said they rarely need a car; this is explored further in the sections Trip

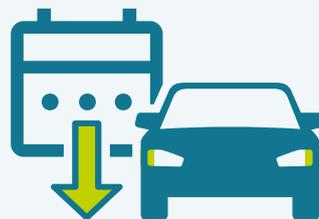
purpose and Journey profile. The desire to avoid the hassle of car ownership was the next most popular reason for joining (48%), followed by respondents' wish to reduce their personal environmental impact (34%). About one third of respondents stated that they wanted to save money; about a quarter wanted to avoid issues with parking in their local area; and over one-fifth wanted access to a van.

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



33%

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



75%

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

"Since choosing to live without a car for environmental reasons, having access to a car on the very rare occasions that we have needed one is very helpful. Being able to hire by the hour is a bonus."

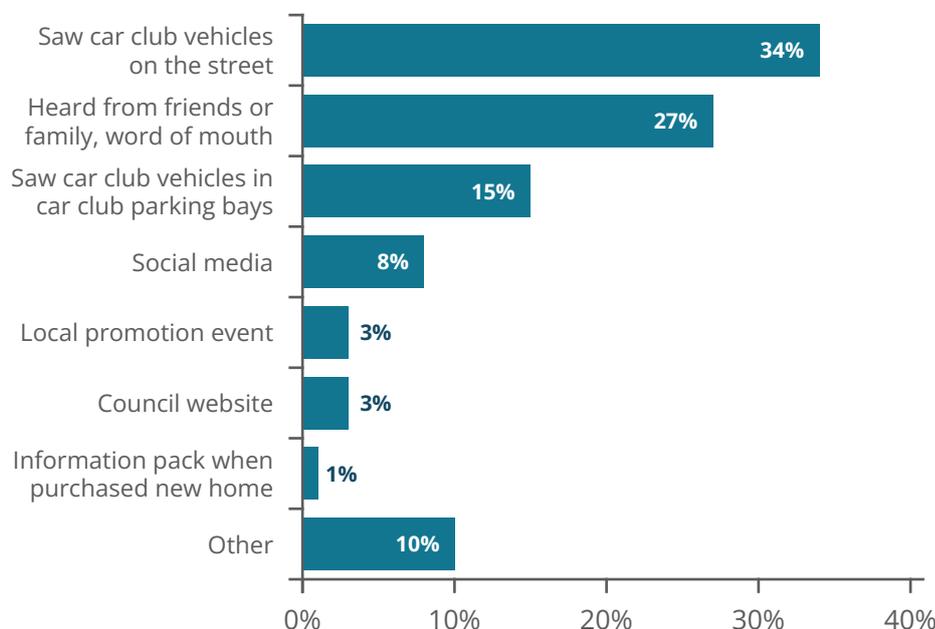
Male user from Harrogate, 55-64

"Where I live there is not enough parking for the amount of cars in the street. Having the car club option means I don't worry about parking, I don't worry about car maintenance. And I cycle, use public transport and walk a lot more than I did when I owned a car as I now have to book the car when I need it. I think it's been good for my health, my environment and obviously it's great for my street that there isn't another private car clogging up the road."

Female user from Glasgow, 25-34

When asked about where they first heard about car clubs, 34% of respondents said that they saw car club vehicles on the street, whilst 27% said that they had heard about it from friends or family. 15% had seen car club vehicles in car club parking bays and 8% had heard about car clubs on social media. 10% stated 'other'.

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



"I live walking distance to my town for work and shopping, which has good train connections for when I need to travel further. I rarely need a car, so I don't really want the expense of one. For the occasions I do need to drive, my car club gives me an affordable, flexible option."

Male user from England (town unknown), 25-34

"Mostly I cycle, walk or use public transport, but sometimes a car is very useful. Car club fills those gaps."

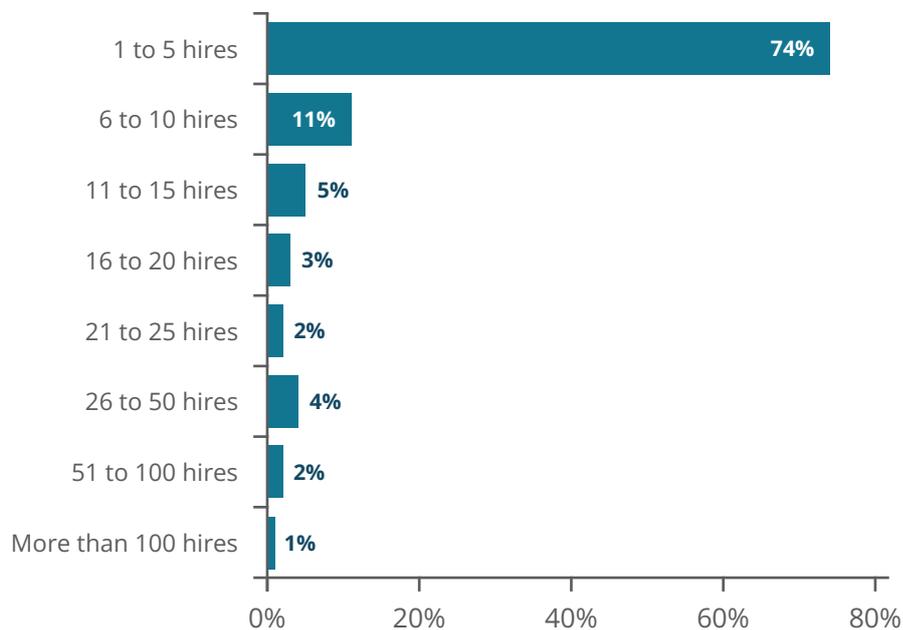
User from Glasgow (gender and age unknown)

Trip purpose

Car club members are infrequent drivers. When examining operator data for the period October 2022 to September 2023 for those who had hired a vehicle at least once, 74% of individual members in the UK had used the car club fewer than 6 times over the year. Another 11% had 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 27% of private members who had made a financial commitment to a car club operator had not used the car club at all over the course of 12 months. This finding underlines 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)

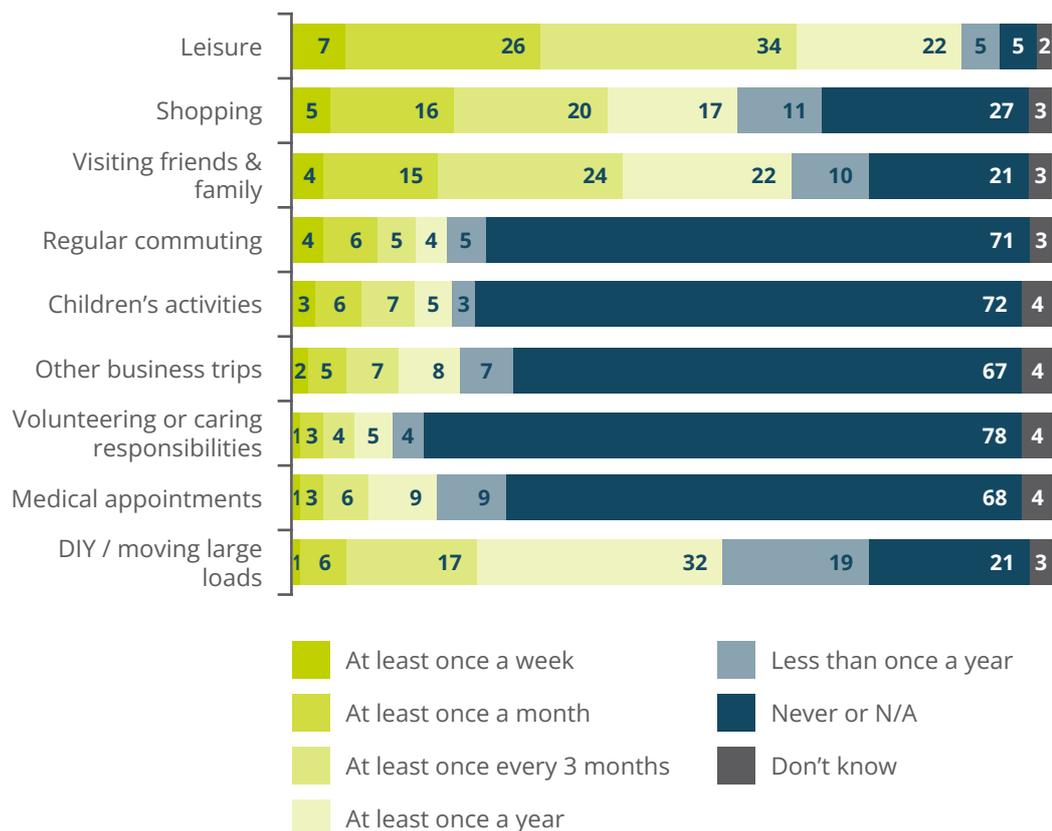


Percentages refer to share of active, private members who hired a car club vehicle for a given number of times between 1 October 2022 and 30 September 2023, excluding members with 0 hires

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 week or once a month is leisure, followed by shopping. For leisure, 7% of respondents are using car clubs at least once a week and another 26% are doing so at least once a month. For shopping, 5% of respondents are weekly users; and 16% use the car club at least once a month for this purpose.

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. This is true for both car club users who own one or multiple cars and car club users who do not own a car.

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



33%

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



21%

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

"I live in the city centre in a building with no nearby parking in an area that has fantastic local wildlife areas... which are unfortunately inaccessible by public transport. The car club has allowed me to continue driving after passing my test this year without needing to purchase a car, and has allowed me to explore fantastic nearby areas that I was otherwise missing out on."

Female user from Norwich, 25-34

"Being a member of a car club has enabled me to go camping with my kids for the first time. It wouldn't have been worth buying a car just to do this, so hiring a car has been ideal."

User from Cardiff, 35-44

Journey profile

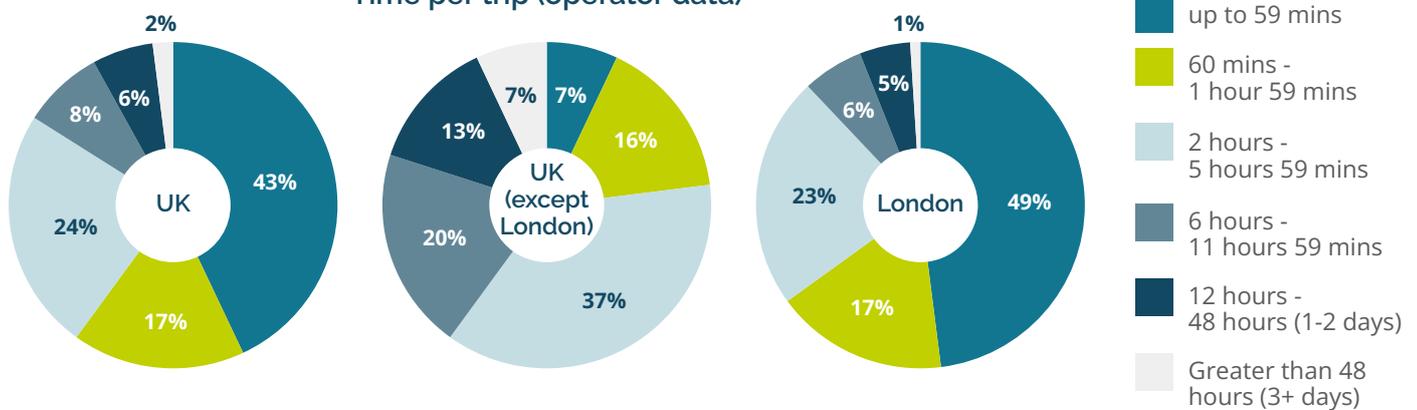
Duration of hires

Operator data shows that car clubs are predominantly being used for shorter trips. Between October 2022 and September 2023, 43% of all car club hires in the UK lasted for less than one hour, whilst 17% lasted between one and two hours. These statistics are strongly influenced by data from London, which accounts for 87% of all car club trips and where journeys under 2 hours dominate (66%). In the rest of the

UK, the duration of car club hires was 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 21 minutes in 2022. For car trips undertaken as a passenger, the average trip duration was 22 minutes.¹

Time per trip (operator data)



Distance of hires

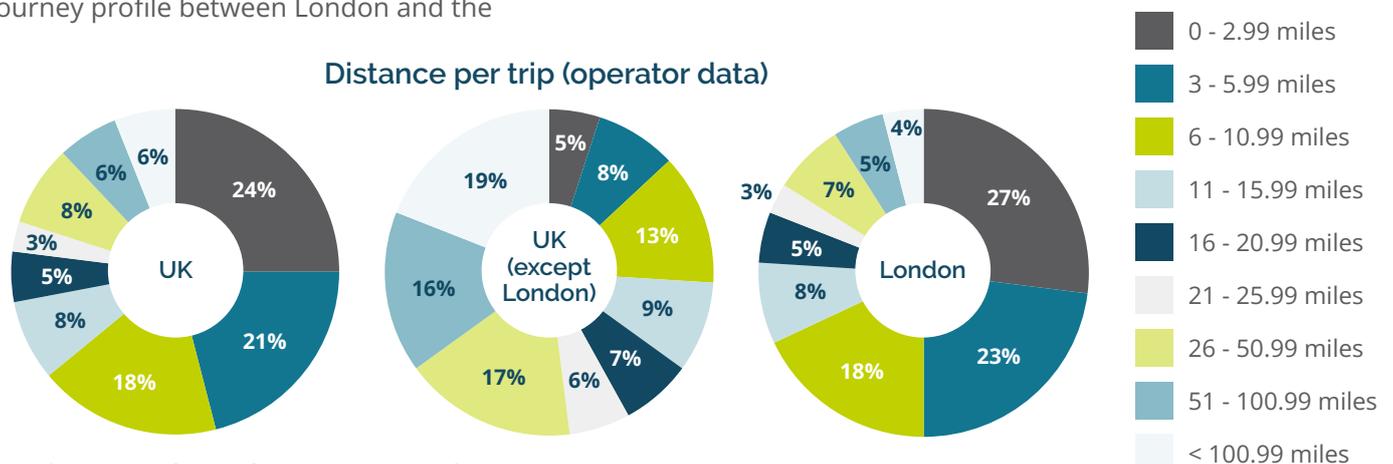
Based on operator data for October 2022 to September 2023, the median distance travelled during a car club hire in the UK was 8.5 miles, meaning that the distance driven on one half of all car club hires was shorter and the other half was longer than 8.5 miles. 63% of all hires involved travel of less than 11 miles.

rest of the UK. Outside London, only 26% of all car club hires were under 11 miles; whilst in London, this percentage amounted to 68%.

The average distance of car trips undertaken as a driver in England overall was 8.1 miles in 2022; for car trips undertaken as a passenger, the average distance was 8.9 miles.²

Again, there is a marked difference in the journey profile between London and the

Distance per trip (operator data)



1 DfT: National Travel Survey NTS0303f

2 NTS0303d

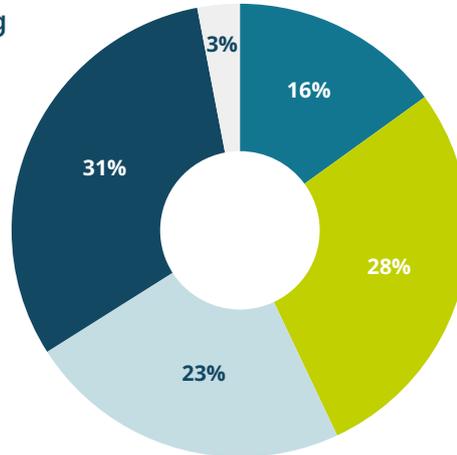
Access to vehicles

Regarding the time to access a car club vehicle, 44% of survey respondents said that it takes them 10 minutes or less to get to the car club vehicle from the usual starting point of their most common trip. Among these were 16% of respondents

who said that it takes them less than 5 minutes to get to the car club vehicle. Another 23% reported that it takes them between 11 and 20 minutes, whilst 31% stated that it takes them more than 20 minutes. 3% said that they did not know.

Time needed to get from the usual starting point of the trip to the car club vehicle for their most common car club trip

- less than 5 minutes
- 5 to 10 minutes
- 11 to 20 minutes
- more than 20 minutes
- Don't know



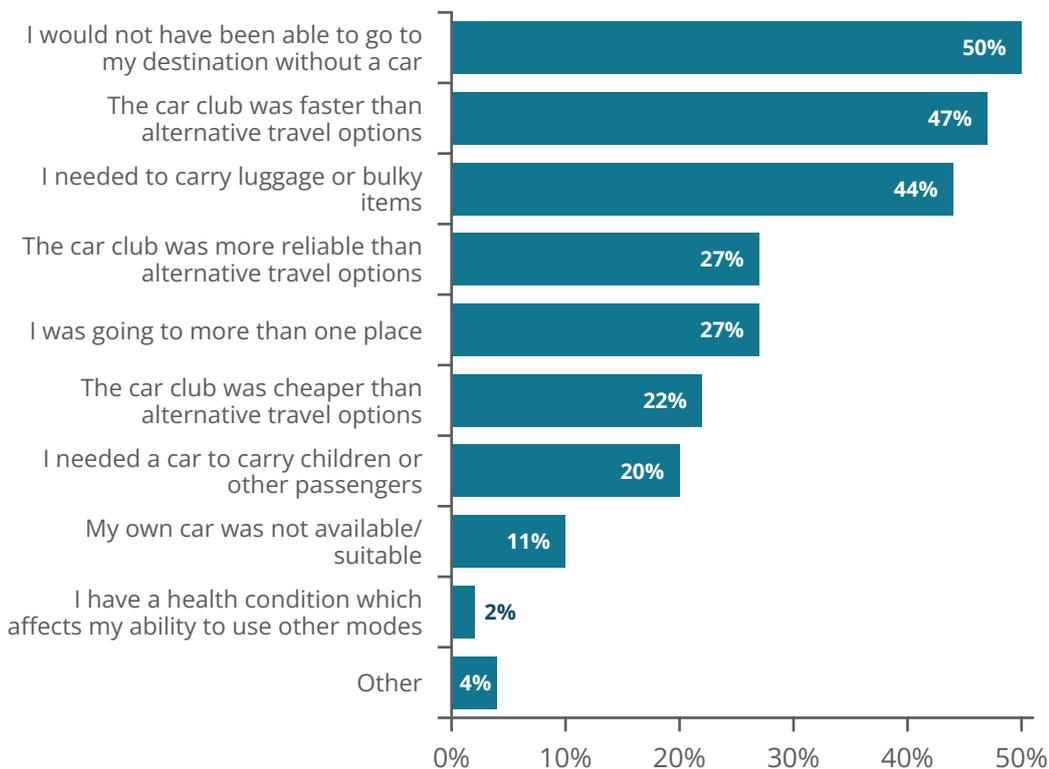
Enterprise Car Club

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 for their most common car club journey (with multiple responses possible). The most commonly selected reasons were that respondents would not have been able to go to their destination without a car (50%), that the car club was faster than alternative travel options (47%), that the car club was cheaper than alternative travel options (22%), and the need to carry children or other passengers (20%).

(47%), and that respondents needed to carry luggage or bulky items (44%). Other options that were selected by at least one-fifth of respondents included that the car club was more reliable than other options (27%), that respondents were going to more than one place (27%), that the car club was cheaper (22%), and the need to carry children or other passengers (20%).

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



50%

of car club members said that they would not have been able to reach their destination without a car

"It has helped me to have more choices in life, e.g. getting to places that would have meant multiple forms of public transport; taking disabled friends on shopping and other trips."

Female user from Glasgow, 65-74

"Having access to car club van hire has made my life a million times easier this year after moving to London and trying to furnish a new flat. It's always so easy to pick and personally I think the van hire price is brilliant."

Female user from London, 25-34

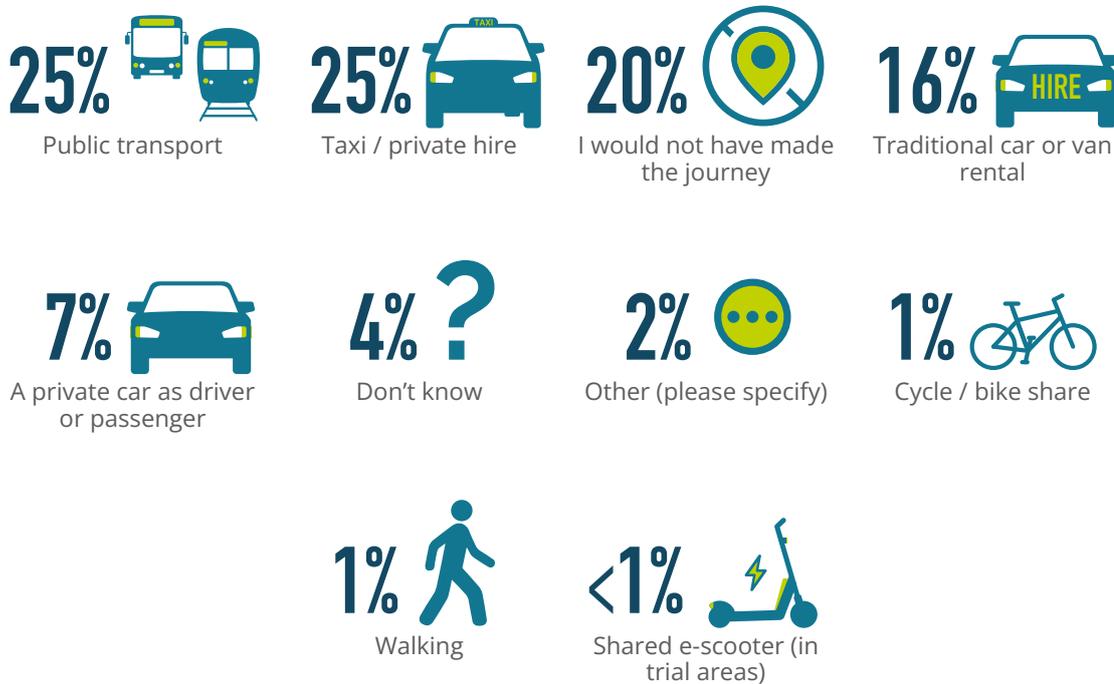
Modal switch

Car clubs enable members to carry out trips that they would not have made otherwise. 20% of respondents reported that they would not have made the trip if a car club had not been available for their most common (car club) trip.

Another 48% stated they would have used another form of car for their most common trip if a car club had not been available.

Respondents indicated that they would have used a taxi or private hire vehicle (25%), traditional hire car or van (16%) or a private car, either as a driver or passenger (7%). 25% of respondents said they would have used public transport, and only 2% would have walked or cycled. Less than 1% would have used a shared e-scooter. 6% 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)



48%
of respondents said they would have used another form of car, including taxi, car hire or private car for their most common trip if the car club wasn't available

The majority of car club users were also in favour of policies that give car clubs preferential treatment, for instance over private cars. When asked if they agreed or disagreed with the statement: 'Governments should give car clubs preferential treatment through policies such as taxation or local parking rules', 51% of respondents strongly agreed and 32% agreed. Only 3% disagreed or strongly disagreed. The remaining respondents neither agreed nor disagreed or said that they didn't know.

Inclusivity and accessibility

Car clubs particularly enable individuals with lasting health conditions to take trips that they would not have made otherwise.

Among car club members with a lasting health condition that reduces their ability to carry out day-to-day activities, the share of respondents who said that they would not have made their most common journey without a car club car is 9 percentage points higher than for respondents without a lasting health condition.¹ Specifically, 28% of respondents with a lasting and constraining health condition (4% of all active, private car club members) would not have made the journey, compared to 19% of respondents without a lasting health condition.

Respondents on lower incomes and female respondents were also more likely to state that they would not have been able to make their last trip without a car club car,

compared to those on higher incomes and male respondents, respectively.

The relationship between income and the enabling effects of car clubs are outlined in the graph below. The share of female respondents who would not have made their most common journey without a car club is 22%, compared to 18% for male respondents.



LEAP Car Club

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



1 A 'lasting health' condition was defined as lasting, or expected to last for 12 months or more.



28%

of car club members with a constraining health condition would not be able to travel by other means for the most common trip that they use the car club for



28%

of respondents on the lowest income band (<£10,000) would not be able to travel by other means for the most common trip that they use the car club for

"My wife faces problems with her hip and knee joints, making her mobility quite challenging. I'm immensely thankful for the car club that [...] provided me with a means of transportation. Given the frequent doctor visits and the difficulty of moving my wife from point A to point B, the car club is a lifeline for us. Unfortunately, I lack the means to purchase a car of my own, making this car club an invaluable support for our family."

Male user from England (town unknown),
65-74

"Being a member of a car club has meant that, as a disabled person, I've been able to make the same journeys as others with relative convenience. I can honestly say that my life would be greatly negatively impacted were I not able to be a member of a car club with a choice of local vehicles."

Male user from Edinburgh, 45-54



Zipcar

Sustainable travel habits

The survey responses indicated that car club members typically have higher use of sustainable modes than national averages. This is even true when evaluating travel patterns outside London (rest of England, Scotland, Wales and Northern Ireland combined) separately, despite the typically more limited public transport offers and longer trip distances in other parts of the UK.

35% of all UK car club users who responded to our survey were using a bicycle at least once a week. Outside London, 37% of car club users cycled at least once a week, in London 33% did so. In 2022, only 14% of people in England cycled once a week or more on average.¹

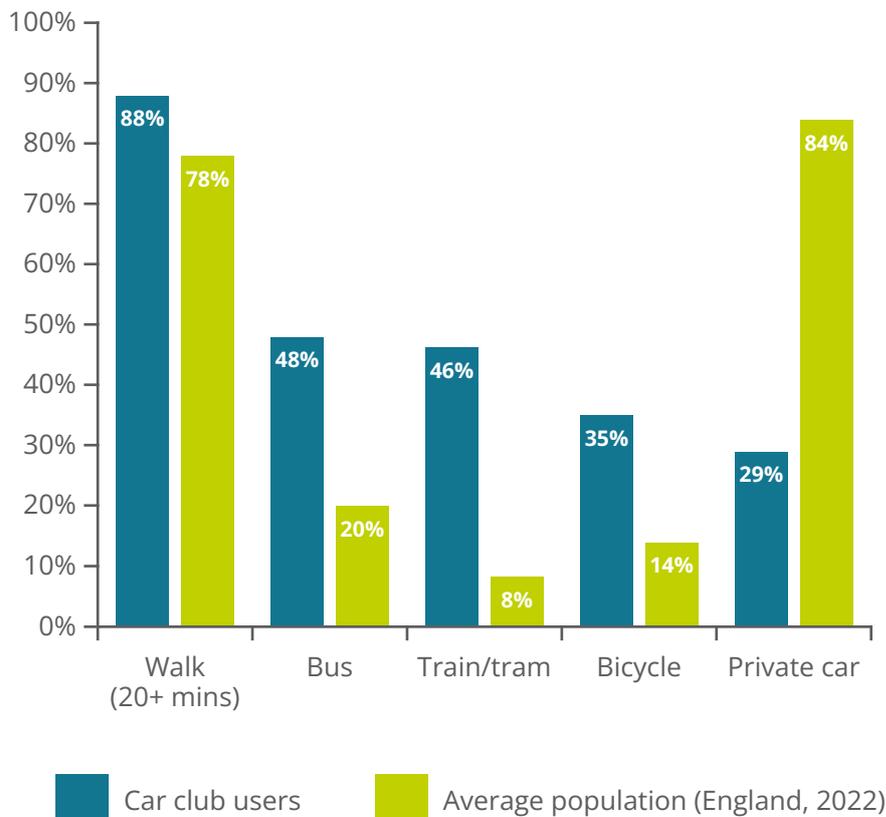
88% of car club members were walking for 20 minutes or more at least once a week. This share is almost the same in London

(87%) and in the rest of the UK (88%). This compares to 78% of the general English population in 2022.²

48% of car club members were using a bus at least once a week and 46% were using a train or tram at least once a week. Outside London, the respective numbers are 39% for at least weekly bus use, and 31% for at least weekly train or tram use; in London 62% and 69%. This compares to a national average in England of 20% and 8%, respectively, in 2022.³

Moreover, car club members use private cars significantly less often than the average person in England. Only 29% of car club users (in London 25%, outside London 32%) said that they use a private car at least once a week, compared to 84% of the average English population in 2022.⁴

Percentage of individuals who use public transport and/ or active travel at least once a week (respondents could choose more than one option)



1 [DfT: National Travel Survey: Mode of travel](#), NTS0313

2 NTS0312

3 NTS0313

4 NTS0313



35%

of car club members were using a bicycle at least once a week, compared to a national average of 14% in England



48%

of car club members were using a bus at least once a week, compared to a national average of 20% in England

"I gave up my car because it would just sit outside the house all day except to either go for a 10 minute drive to the supermarket or a 500 mile round trip to parents and in laws. A car club is better for the short journeys and the train is much better for the longer journeys."

Male user from London, 55-64

"I am close to my place of employment, so I don't need a car to commute - I cycle, walk, or use the bus. I live in the city centre, so I usually have a good choice of cars on the odd occasion that I'd like to drive."

Male user from Aberdeen, 55-64



Enterprise, New Lubbethorpe, Leicester

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 134 hectares of public space, an area almost equivalent to the size of Hyde Park (see details below).

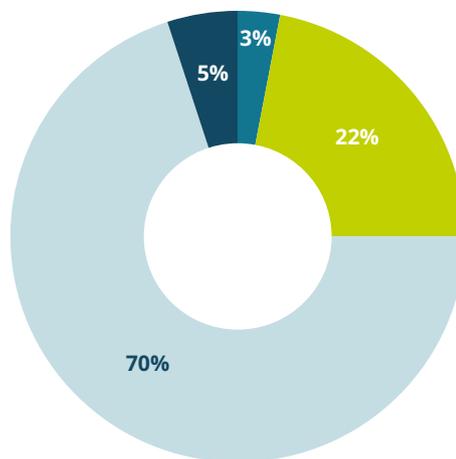
Overall, 69% of car club members said that their household does not have access to a privately owned car (including company cars). Only 8% said that they had access to more than one privately owned car.

When asked about changes in car ownership, 22% of respondents stated

that the number of cars in their household had decreased since joining the car club. This includes 2% of respondents who said that the number of cars in their household decreased by more than one car. 70% of survey respondents reported no change in the number of cars in their household. 3% of respondents stated that the number of cars in their household had increased since they had joined the car club. 5% said that they didn't know or preferred not to respond.

Change in number of cars in household since joining car club

- Increased
- Decreased
- Stayed the same
- Don't know / prefer not to say



31% of respondents said that they deferred the purchase of a car thanks to the car club. Among those were 29% who claimed that their household would have bought or leased a car if they had not become members of a car club, and

2% who said that they would even have bought or leased more than one car. 23% said that they were not sure. Only 46% of respondents said that they would not have bought or leased a car in the absence of a car club.



22%

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



31%

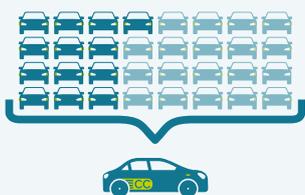
of members said that they would have bought or leased a car if they hadn't joined the car club

We estimate that, in 2023, each car club vehicle in the UK replaced around 26 private cars. We arrive at this number by averaging the net car loss of our survey respondents across our entire sample. The net car loss 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 cars that respondents said that they had bought since joining the car club.¹ This indicates that, on average, each car club member in the UK disposed of 0.39 cars since joining the car club. Projected to all 299,989 individual active car club members in the UK, this equals a reduction of 116,339 vehicles, or a reduction of 26 cars per publicly available car club vehicle currently in operation.

When only observing the real reduction in private cars caused by car clubs, excluding cars that respondents said that they deferred purchasing thanks to a car club, every car club car still replaces 14 private cars, or a total of 61,446 private cars across the UK.

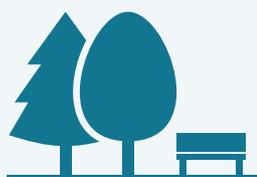
How many private cars a car club car replaces strongly depends on the context in which a car club operates. In 2023, in London, one car club car replaced around 15 private cars in real terms and around 32 private cars when factoring in car purchases that were deferred thanks to car clubs. Outside London, one car club car replaced around 8 private cars in real terms and around 14 private cars when including deferred purchases.

Overall, the private cars that were replaced due to car clubs in the UK (including deferred purchases) occupied an area of over 134 hectares, given that a car park spans approximately 12 square metres.² This means that an area almost equivalent to the size of Hyde Park that was previously required for car parking, can now be used by the public for other purposes. In London alone, the space savings resulting from car clubs equals 107 hectares.



14-32 cars

In 2023, each car club vehicle in the UK replaced between 14 and 32 private cars



134 ha

Car reduction by car clubs frees up the space of 134 hectares, an area almost equivalent to the size of Hyde Park

"We love the convenience that the car club offers us. It has enabled us to give up car ownership with hefty insurance premium hikes, road tax and general maintenance. The cars we access are newer than anything we would personally opt to buy and always are cared for to the highest of standards."

Male user from Edinburgh, 25-34

"The year I went without owning a car. I saved so much money, and using the car club as an option for transport was a key part. Being able to have easy access to a car for short notice/urgent reasons helps a lot."

Male user from Birmingham, 25-34

- 1 For respondents who said that they both deferred the purchase of a car and that the number of cars in their household had changed since joining the car club, we only accounted for the "real" change in car ownership. This means that for these respondents we did not factor in the deferred purchase of (a) car(s), in order to avoid double-counting the number of reduced cars.
- 2 The current UK norm for a parking space is 2.4 by 4.8 metres ([British Parking Association](#))

Mileage reduction of car club members

In addition to reducing the number of cars on roads and in public spaces, car clubs also contribute to a reduction in overall car mileage. When asked to provide an estimate of the change in their monthly car mileage since joining, 31% 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 9% reported a mileage increase. The 43% saying 'don't know' probably included many people who felt uncomfortable providing a specific estimate.

REDUCING CAR MILEAGE



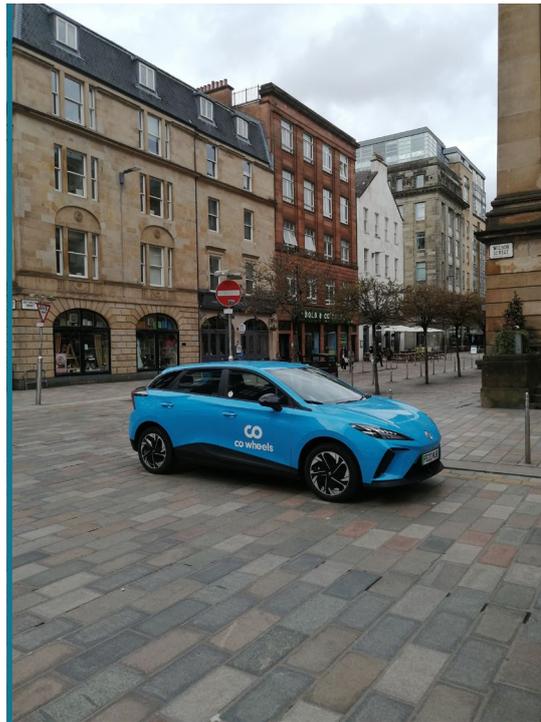
153 miles

per year is the net average car mileage reduction per UK car club user. This is equivalent to 4% of the average yearly car mileage per person in England.

31%

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

Based on this data, we estimate that, on average, each survey respondent has reduced their monthly car mileage



Co Wheels

by 13 miles.¹ This would equal a yearly reduction of 153 miles. Given that, in 2022, an average person in England travelled 4,246 miles by car every year, this would represent an annual reduction in car mileage of about 4%.²

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 2030,³ or the Mayor of London's aim for 80% of all trips to be made sustainably by 2041.⁴

- 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 Combined figure for car driver, car passenger, taxi and minicab use. [National Travel Survey 2022: NTS0303c](#)
- 3 [Transport Scotland: 20% reduction in car km by 2030](#)
- 4 [The Mayor's Transport Strategy](#)

Electric cars and low emission vehicles

Car clubs also lead the way in the electrification of the UK's car fleet.

By the end of September 2023, 35% of publicly accessible car club cars in the UK were electric. When factoring in car club vans in addition to cars, 29% of the UK's entire car club fleet that is accessible to the public was fully battery-electric (not hybrid vehicles). This is a substantial increase from the 14% of electric vehicles (EVs) that were part of the UK car club fleet in 2022.¹



35%

of publicly available car club cars in the UK are electric

Among privately owned cars in the UK, just over 1% were battery electric by the end of September 2023.

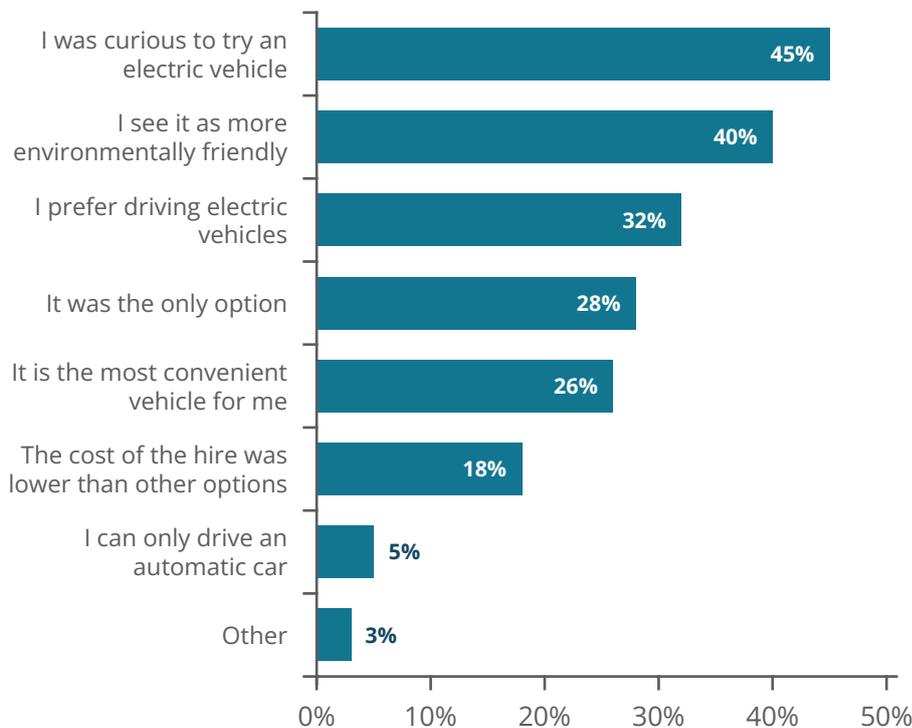
Even car club van fleets are being gradually electrified, with 5 electric vans operating in England and 3 in Scotland by the end of September 2023.²

Of those car club cars in the UK that are not fully electric, 35% are either hybrid or plug-in hybrid. All car club cars are compliant with low emission zones. 57% of all car club vehicles in the UK are under 2 years old, whilst almost 100% are under 5 years.

Among our survey respondents almost half, 49%, had used a fully electric car club vehicle. This is an increase of 7 percentage points compared to 2022.

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 32% stated that they preferred driving electric vehicles.

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



1 The analysis of car club vehicles' fuel types in 2022 also included vehicles that were reserved for corporate use only

2 [Department for Transport: Vehicle licensing statistics: VEH0105 and VEH0142](#)

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 no electric vehicles in their area, 24% said that they were concerned about charging, and 23% said that there were no electric vehicles available when they tried to book them. 18% had concerns about the vehicles' mileage range and 16% did not understand how to use them. 11% preferred other vehicles. This demonstrates that, whilst technical issues are a concern for some car club members, availability of electric cars is, by a large margin, the most important obstacle to car club members using more electric cars.

"I couldn't believe how cheap it was and it was my first time driving an electric and automatic vehicle and so aside from being handy and helping me move house, it was just cool to have the accessibility when I can't afford a car like the ones on offer."

Female user from London, 25-34

In those areas where car club EVs are widely available, as in some London boroughs, car clubs can also help avoid the large overhead costs of purchasing an EV. In another recent piece of research, CoMoUK has estimated that using EVs as part of a car club in London helps save around £5,600 per year compared to owning an EV, and £6,200 compared to leasing an EV.¹

For those car club members who had used electric vehicles, satisfaction levels with electric vehicles were generally high. 54% were very satisfied and 37% satisfied with

driving an electric car. Over 60% were very satisfied or satisfied with the introduction that they received from car club operators, the cars' mileage range and charge level on pick up.

Satisfaction levels for charging car club EVs is somewhat lower. 43% of respondents said that they were very satisfied or satisfied with charging at the end of a hire, 22% said they were very satisfied or satisfied with charging mid-hire. However, many of the respondents to both these questions simply indicated 'not sure or not applicable'. In response to a separate question that allowed multiple answer options and that was only presented to EV car club users, almost half (49%) of EV car club users reported that they had not charged an electric car club vehicle themselves in the previous 12 months, and only 36% had used dedicated car club bay charge points. An even smaller share of EV car club users had used different kinds of public or off-street charge points, with rapid chargers (43kW+) being the most popular option (which had been used by 11% of EV car club users). Only 7% of respondents said that they were dissatisfied or very dissatisfied with charging a car club EV at the end of their hire, and only 11% were dissatisfied or very dissatisfied with charging mid hire.



Zipcar



91%



of respondents were satisfied with driving the electric car club vehicles



>2/3



More than 2/3 of respondents were satisfied or very satisfied with the electric vehicle's mileage range

¹ [CoMoUK: The costs of using a car club EV compared with owning or leasing an EV](#)

Customer satisfaction

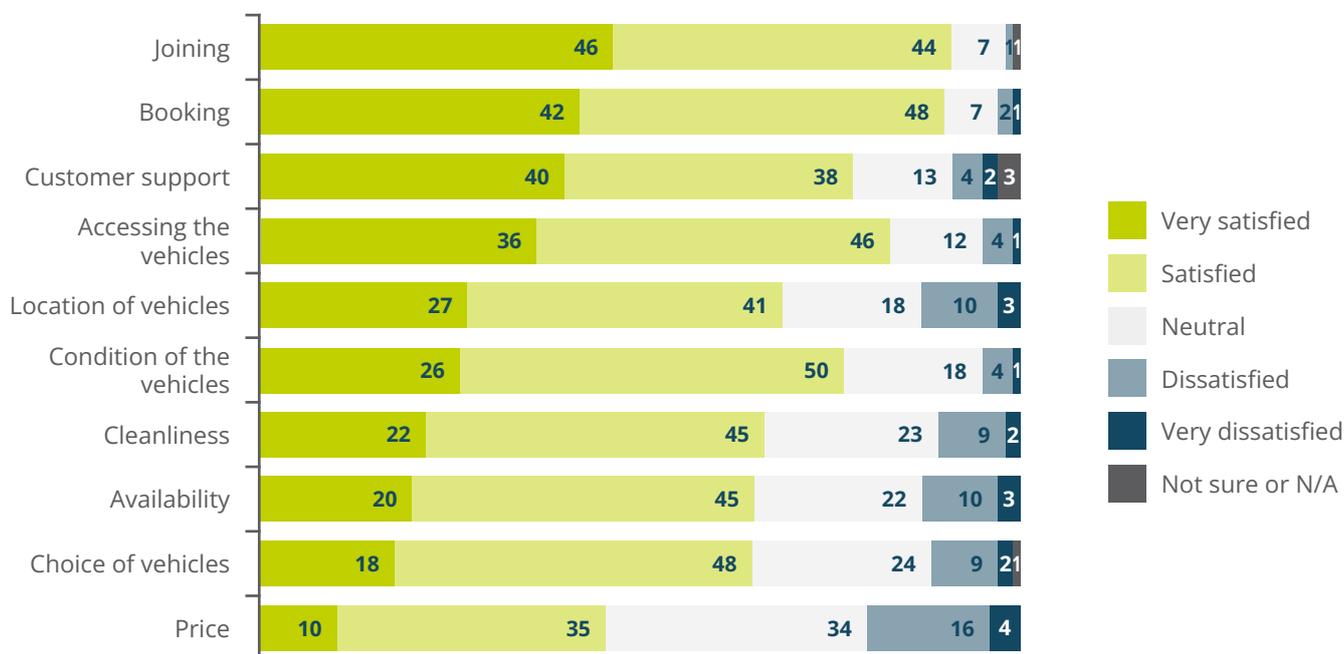
Members were asked about their levels of satisfaction with a range of aspects of the service. The majority of respondents were very satisfied or satisfied with most aspects of the services, from the joining process (46% very satisfied, 44% satisfied), to making a booking (42% very satisfied, 48% satisfied), and the customer support (40% very satisfied, 38% satisfied). Fewer people were happy with the availability of vehicles (20% very satisfied, 45% satisfied) and the choice of vehicles (18% very satisfied, 48% satisfied). The only aspect with which the

majority was not satisfied or very satisfied was price. However, even with this aspect, only 20% claimed to be dissatisfied or very dissatisfied.

"My experience of my car club has only improved and improved over the years I have been using it. Help when there's a problem with the car has become easier and faster."

Female user from Edinburgh, 55-64

Customer satisfaction (values in %)



Hiycar

Data, contacts and further information

The UK CoMoUK Car Club Annual Report 2023 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.

-  info@como.org.uk
-  www.como.org.uk
-  [@Como_UK](https://twitter.com/Como_UK)

Published: May 2024

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



como.org.uk

