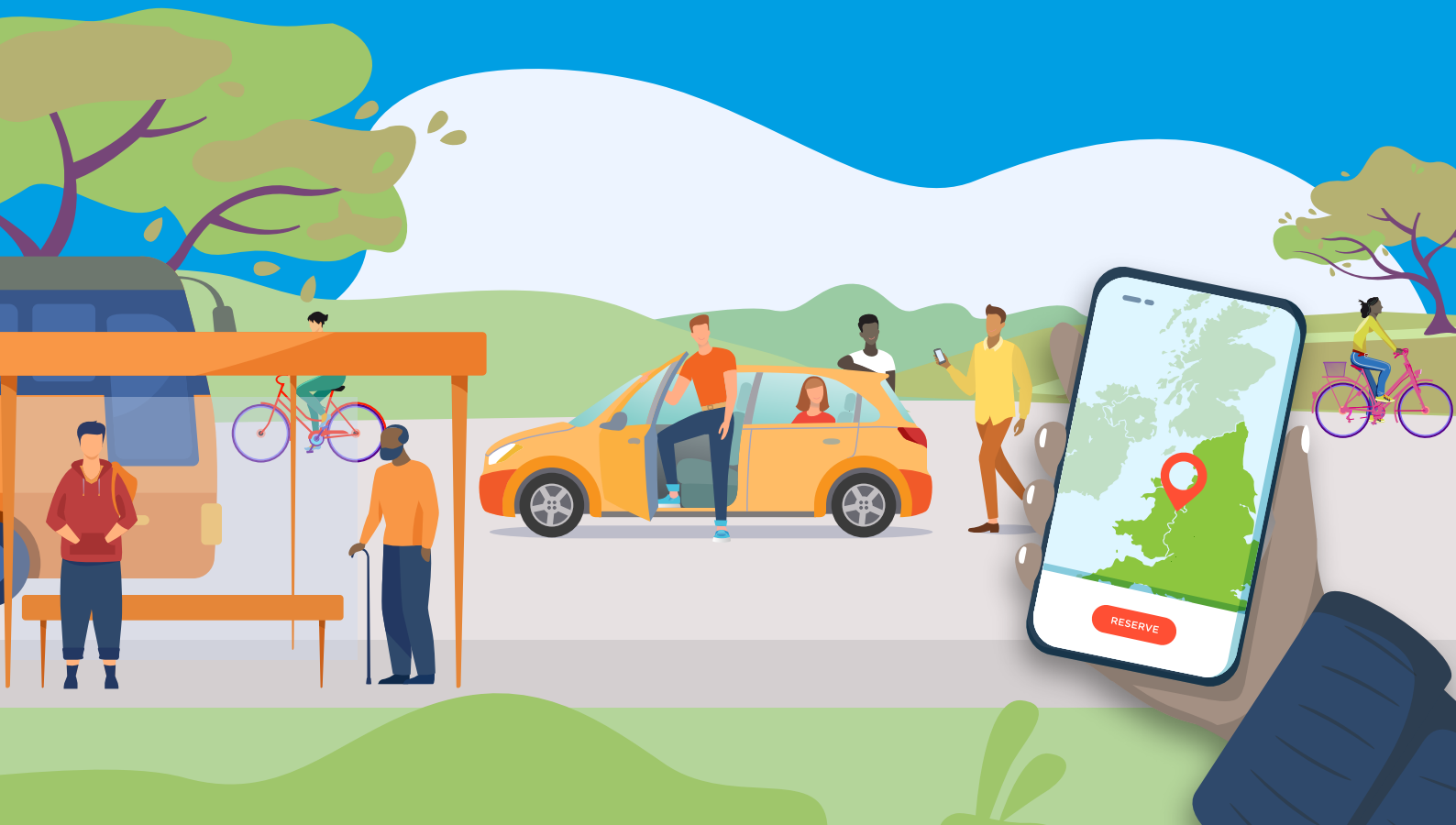


Car Club Annual Report England and Wales 2020



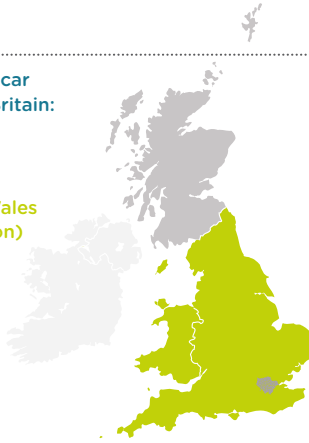
ACTIVE CAR CLUB MEMBERS



FLEET SIZE

Fleet size: 6,060 car club vehicles in Britain:

1,598
in England and Wales
(outside of London)



CARBON SAVING



1150

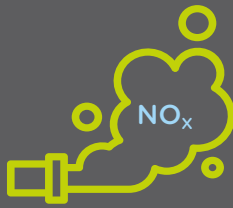
Car club carbon savings for England and Wales outside London are equivalent to the lifetime CO₂e absorption of around 1150 trees

AIR QUALITY



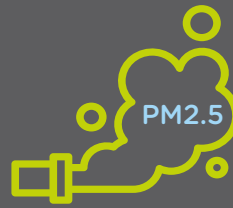
99%

of car club cars are Low Emission Zone and Clean Air Zone compliant



84% ↓

lower NO_x emission than the UK average car



71% ↓

lower PM2.5 emission than the UK average car²

COST SAVINGS



20%

of respondents stated that they couldn't afford to own a car, and this was their reason for joining the car club

CAR AGE



1.5 YRS

Average age of car club cars

VEHICLE SAFETY



100%

of the car fleet has NCAP rating of either 5 star or 4 star

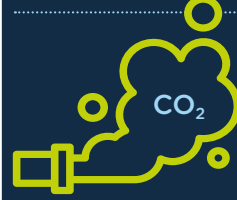
REDUCING PRIVATE CAR OWNERSHIP



9

private cars taken off the road by each car club in England & Wales

CARBON EMISSIONS



25.5%

less emissions in England and Wales car club car compared to the average UK car

ELECTRIC CARS



42%

of respondents reported having used an electric vehicle



6%

of the car club fleet are electric, by comparison, less than 1% of cars in England and Wales are electric³



OVER 80%

were satisfied with the electric car club experience



ONLY 32%

were satisfied with charging points

¹ Members who have used the car club in the last 12 months

² Particles that have diameter less than 2.5 micrometres

³ Department for Transport, VEH0105 and VEH0132b

Foreword

It gives us at CoMoUK great pleasure to present this 2020 car club research. This England and Wales report is one of a suite of reports covering Scotland, London and the whole of Great Britain respectively, all stemming from the same research conducted at the same time in this unique period in our history.

Our thanks to all our stakeholders – and in particular car club users and providers, the Department for Transport and the EU Inter-reg programme SHARE-North – without whom this research would not be possible.

The Covid-19 pandemic has affected all of us far beyond transport, while inevitably shaping the experience and behaviour of car club users across England and Wales. We expand on that in this report and hope that the post-pandemic momentum is towards public transport and sustainable travel and not away from it.

Yet for me the most important insight is how so many of our key findings are consistent with the many years of research we now have into this sector (our very first foray was in 2002).

That is to say that car clubs:

- take out substantial numbers of private cars (users told us wider availability of car club cars was a critical issue in encouraging them to dispose of car);
- per car emit much less than the UK average car;
- are used by far more people per car than private cars, leading to far fewer cars for a population's motorised travel needs;
- do not foster car use but rather cut net mileage and are mostly used off-peak;
- boost use of public transport and walking and cycling;
- provide much more affordable and more sustainable access to electric vehicles than purchase or lease;

Based on this evidence, we contend that this set of interlocking virtuous circles are part of what the future of transport emissions across England and Wales will need to look like if our national legal limit of net zero greenhouse gas emissions by 2050 at the latest plus our forthcoming legal target of a 78% emissions cut from 1990 levels by 2035 are going to be met.

We cannot let these findings pass without acknowledging that this is a sector without subsidy support, that indeed pays to operate. It has almost no dedicated access to electric vehicle chargepoints and is not part of strategic transport planning across the country and often not part of that at regional or local levels either. Yet it is delivering sustainable transport on the ground and we see some encouraging signs of policy progress. With the right policy environment it could deliver even more.

We look forward to working with stakeholders across England and Wales to help create that environment as part of the country's continuing turn towards a range of convenient, attractive and sustainable transport options.

Richard Dilks
Chief Executive, CoMoUK



Introduction

This report covers the period 1 November 2019 to 31 October 2020. This research has been created by CoMoUK and has been administered by consultants from Cenex and Revolution9, with input and contributions from car club operators.

The Covid-19 pandemic has of course significantly altered how we live, work and travel. Personal circumstances have changed for many people and restrictions on movement have had a substantial impact on the car club sector.



Methodology

Over the last 14 years, CoMoUK has worked with car club operators to collect a range of data on 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 national operators (Zipcar, Enterprise Car Club, Ubeeqo, CoWheels and Hiyacar).

The data was collected in three parts:

- A car club member survey was completed by 4,987 respondents
- A qualitative study looked at motivations behind modal shift, triggers and barriers to use, customer experience and how these are impacted by Covid-19

- A car club operators' survey gathered data on operational vehicle usage and trends pre and post the first national lockdown
- A fleet survey provides a profile of the car club vehicles

This summary report provides an overview of the key findings. A full report detailing the methodology and data is available on request.

Car club membership: membership growth

Prior to the pandemic's disruption to travel patterns, membership of car clubs in England and Wales was growing.

Total membership has grown by 90% to nearly 50,000 since the last report in October 2018. The number of active members (those who have used a car club vehicle in the last year) stands at 28,324.

Impact Covid-19 on travel habits

The Covid-19 pandemic has had a profound impact on how we live, work and travel. As a result, the car club sector in Great Britain faced significant challenges in 2020.

Car club operators played a vital role in keeping key workers moving while their usage by the public of course fell during lockdowns. This research has sought to understand travel behaviours of car club members throughout the pandemic.



74%

of respondents said their travel choices were affected by Covid-19



34%

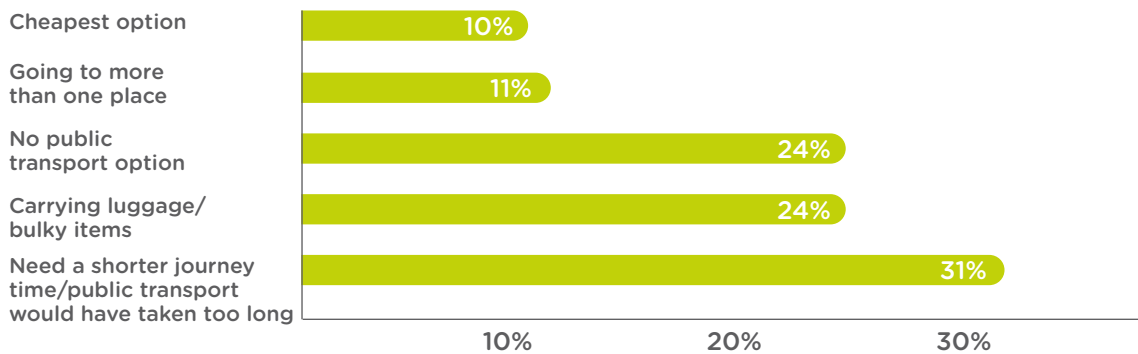
of respondents said they would choose the travel option that makes them feel safest in terms of Covid-19

JOURNEY PROFILES



The majority of people are using the car club very infrequently at less than 5 times a year (75%), with a further 12% only taking between 6 to 10 trips per year

Reasons for car club use



"I needed a car to collect a number of objects from another town. My workplace's car club cars are conveniently located to my office so I booked one. I couldn't have used a courier for this collection due to the nature of the objects, so this was very convenient and cost-effective."

Katie, Bristol

Use of other modes

Our research has consistently found that car club members have higher use of sustainable modes than national averages. In the last six months, we found 30% of respondents used a bicycle three times a week; on average 11% of people in England cycle more than once a week.⁴

Due to Covid-19, use of public transport was much lower than usual in 2020. Our last England and Wales report (2018) found 22% of respondents travelling by train at least once a week compared to the England average of 8% and 32% travelling by bus at least once a week compared with the England average of 25%.



30%

of respondents said they used a bicycle three times a week

Cost savings

20% of respondents stated that they couldn't afford to own a car and this was their reason for joining the car club. Those interviewed in the research reported cost savings against car ownership (some as high as £1,000 in a year). Most members stated they used the service between 1-5 times per year which is likely to cost a great deal less than running a private car when all the costs of owning a car such as finance, depreciation, maintenance, insurance, tax and parking permits are considered.



20%

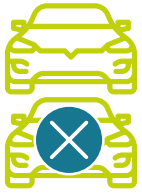
of respondents stated that they couldn't afford to own a car and this was their reason for joining the car club

⁴ Walking and Cycling Statistics, DfT, published 2020

Environmental benefits of car clubs

Reducing private car ownership

Car clubs replace privately owned cars with a smaller number of more efficiently used vehicles freeing up street space for other uses. When combining the percentages of respondents who had either reduced the number of cars they owned or deferred a purchase we can estimate that 9 cars are removed per car club vehicle.



25%

said they had sold a car since they joined a car club



22%

said that said that they would have bought a car if they had not joined car club



9

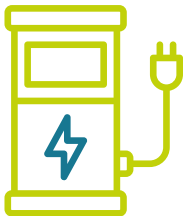
private cars replaced by each car club vehicle in the UK



12,790

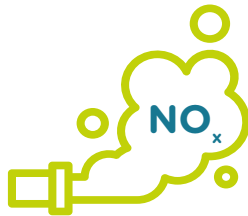
estimated total number of cars removed from UK roads

Improving air quality



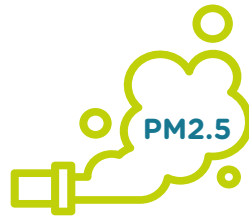
6%

of the car club fleet are electric vehicles, by comparison, less than 1% of cars in England and Wales are electric⁵



84%↓

lower NO_x emissions than the UK average



71%↓

lower PM2.5 emissions than the UK average

- Average car club vehicles in England and Wales have average NO_x emissions of 0.05 g/km and 0.55 g/km for cars and vans respectively
- This is an 84% and 53% reduction respectively from the UK average (0.32 and 1.16 g/km)⁶
- PM2.5 emissions are also significantly lower than the UK average car and van, with car clubs being 71% and 91% lower on average respectively

⁵ Department for Transport, VEH0105 and VEH0132b

⁶ NAEI, <https://naei.beis.gov.uk/>

Greenhouse gas emissions

Reporting on the well-to-wheel (WTW) carbon dioxide equivalent (CO₂e) emissions which include the emissions from producing, transporting, and combusting fuel and electricity, cars and vans in England and Wales car clubs have lower emissions than average UK vehicles.

- The average England and Wales car club car has emissions which are 25.6% lower than the average car on the UK's roads
- The WTW CO₂e emitted by the fleet is estimated to be 1,399 tonnes
- Over the same distance, the average UK car and van would have emitted 1,769 tonnes WTW CO₂e⁷

- This represents a reduction of 22% or 370 tonnes CO₂e, assuming compared to an average UK vehicle
- This saving is approximately the equivalent of removing the lifetime CO₂e absorption of 1,150 trees



1,150

Car club carbon savings are approximately the equivalent of the lifetime CO₂e absorption of 1,150 trees⁸

Mileage reduction

The carbon savings we report on here are based upon the difference between emissions from average car club vehicles and the UK fleet alone.

In addition to this, previous research has shown that car club members in England and Wales reported reducing their mileage. We have not been able to obtain a realistic figure on mileage reduction for 2020 due to the drastic falls in mileage delivered by the Covid-19 lockdowns, figures for the previous two surveys are:

- A net average decrease of 793 miles, (2018 report)
- A net average decrease of 1,009 miles, (2016 report)

Electric car adoption



42%

of respondents reported having used an electric vehicle



6%

of the cars are electric. By comparison, less than 1% of cars in the UK are electric vehicles



80%

were satisfied with the electric car club experience



ONLY

32%

were satisfied with charging points

⁷ NAEI, <https://naei.beis.gov.uk/>

⁸ Further details in the full report available on request

Car club fleet



1,406
cars



192
vans

The number of cars has fallen slightly over the past year, but the long-term trend shows continued growth with an 28% increase in cars since October 2016.

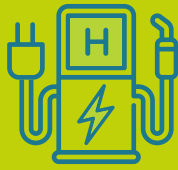
FUEL PROFILE



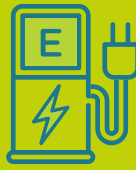
50%
petrol
cars



37%
petrol
hybrids
cars



2%
plug in
hybrids
cars



6%
electric
cars



5%
diesel
vans



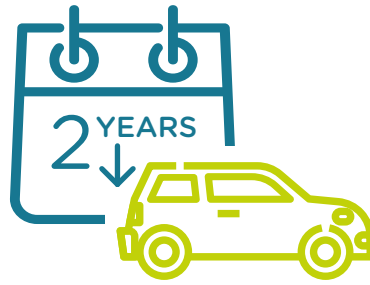
Since 2017/18 there has been a 25% increase in the proportion of plug in, hybrid and electric cars in the car club fleet. 100% of the vans are diesel powered.⁹



⁹ Department for Transport, VEH0403

Car age

- 84% of cars and 80% of vans are under two years old
- Car club cars have an average age of 1.5 years. Vans have an average age of 1.4 years. Vehicles are significantly newer than average UK cars and vans, both of which have an average age of 8.3 years.^{10, 11}
- Members reported that 79% of cars sold were more than 8 years old



74%

of cars are two years old or younger

Low Emission & Clean Air Zone Compliance



99%

of cars are Euro 6 and therefore Ultra Low Emission Zone compliant

Safety



100%

of the cars achieve either a 5 or 4 star Euro NCAP rating. (CoMoUK car club accreditation requires 4 stars or above)

¹⁰ Department for Transport, VEHO211

¹¹ Department for Transport, VEHO411

The 2020 Car Club Annual Report has been published by CoMoUK to continue to build a strong evidence base about the sector. The car club sector faced tremendous challenges in 2020 as a result of Covid-19 and the associated travel restrictions. As a result, the impact of the pandemic dominates the context of the analysis provided in this research.

The data in this report was compiled by Cenex and Revolution9 with input and contributions from commercial car club operators. CoMoUK is the national charity dedicated to the public benefit of shared transport. We are a collective body for shared transport operators, and work across the car share, bike share, lift share, e-scooter and flexible bus sectors.

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 provides local authorities with assurances when procuring services. We want transport to be cleaner, safer, healthier, greener, cheaper, more convenient, and more inclusive.

Get in touch

If you would like to know more about car clubs or any other aspect of our work get in touch and we will be happy to help you.

Email: info@como.org.uk

Web: www.como.org.uk

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

Registered office:
19 Cookridge Street,
Leeds LS2 3AG

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(no. SC044682).