

Car Club Annual Report London 2020



ACTIVE CAR CLUB MEMBERS



FLEET SIZE

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

3,886
in London

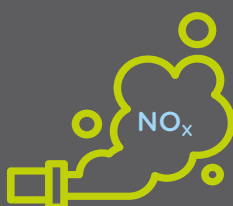


AIR QUALITY



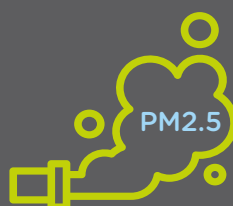
100%

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



91%↓

lower NO_x emission than the UK average car



74%↓

lower PM2.5 emission than the UK average car²

CARBON SAVING



3,800

Car club carbon savings for London are equivalent to the lifetime CO₂e absorption of around 3,800 trees

CAR AGE



1.6YRS

Average age of car club cars

COST SAVINGS



24%

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

REDUCING PRIVATE CAR OWNERSHIP



23.5

private cars taken off the road by each car club in London

CARBON EMISSIONS



25.5%

less emissions in London car club cars compared to the average UK car

ELECTRIC CARS



59%

of respondents reported having used an electric vehicle



11%

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 39%

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, specifically reporting on our capital city. This London report is one of a suite of reports covering Scotland, England and Wales 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 – 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 London car club users. 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 for Londoners than purchase or lease;

Based on this evidence, we contend that this set of interlocking virtuous circles are what the future of London will need to have more of if the Mayor's transport strategy targets, the goal of London being net zero on carbon by 2030, 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, one which is working in a disjointed landscape of 33 independent highway authorities across London. It has very few dedicated access to any electric vehicle chargepoints and is not part of strategic transport planning across the capital. Yet it is delivering for Londoners and the Mayor's transport strategy 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 in London to help create that environment as part of the capital's continuing turn towards a range of convenient, attractive and sustainable transport options for its citizens and visitors.

Richard Dilks

Chief Executive, CoMoUK



Introduction

This Car Club Annual 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-scale operators (Zipcar, Enterprise Car Club, Ubeego, CoWheels and Hiyacar).

The data was collected in three parts:

- A car club member survey completed by 3,463 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 London was growing.

Total membership has grown by 130% to over 550,000 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 189,275.

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 London 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 in London throughout the pandemic.



78%

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



42%

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

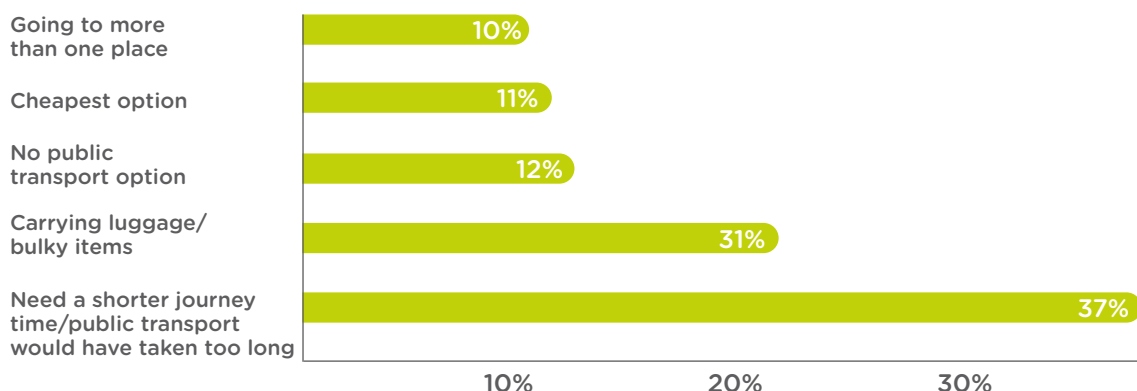
JOURNEY PROFILES



- The majority of people are using the car club very infrequently at less than 5 times a year (69%), with a further 12% only taking between 6-10 trips per year

- Most journeys start outside of peak travel times, 32% of bookings start on weekends

Reasons for car club use

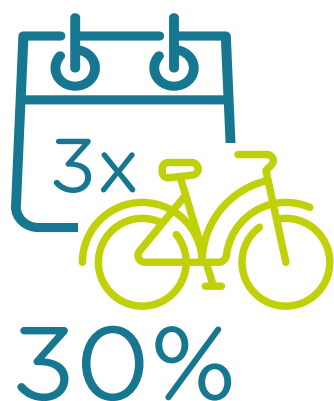


Unsurprisingly, the reasons of “public transport not being an option” was a less frequent response in these London results than in other parts of England (24%).⁴

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 have used a bicycle three times a week; on average in London 9% of people cycle on one or two days per week.

Due to Covid-19, use of public transport was much lower than usual in 2020. Our last London report (2018) found 64% of respondents travelling by Underground at least once a week, compared to the average for people in London of 41%. 37% reported travelling by train at least once a week, compared to the average for people in London of 17% LTDS 2016/17.



of respondents said they used a bicycle three times a week

Cost savings

24% 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.



24%

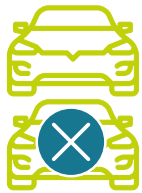
of respondents stated that they couldn't afford to own a car and this was their reason for joining the car club

⁴ The other CoMoUK 2020 car club annual reports can be found on the CoMoUK website at <https://como.org.uk/shared-mobility/shared-cars/why/>

Environmental benefits of car clubs

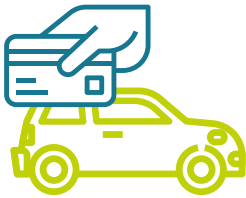
Reducing private car ownership

Car clubs replace privately owned cars with a smaller number of more efficiently used vehicles, freeing up 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 23.5 cars are removed per car club vehicle.



19%

owned one fewer car since they joined a car club



21%

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



23.5

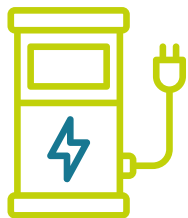
private cars replaced by each car club vehicle in the UK⁵



81,388

estimated total number of cars removed from UK roads

Improving air quality



11%

of the car club fleet are electric vehicles, by comparison, less than 1% of cars in England and Wales are electric⁶



91%↓

lower NO_x emissions than the UK average



74%↓

lower PM2.5 emissions than the UK average

- 11% of the car club fleet are electric vehicles, by comparison, less than 1% of owned cars in London are electric vehicles
- Average London car club vehicles have average NO_x emissions of 0.03 g/km and 0.29 g/km for cars and vans respectively
- This is a 91% and 75% reduction respectively from the UK average (0.32 and 1.16 g/km)⁵
- PM2.5 emissions are also significantly lower than the UK average car and van, with car clubs achieving 74% and 91% reductions, 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 London car clubs have lower emissions than average UK vehicles.

- The average London car club car has emissions which are 25.5% lower than the average car on the UK's roads
- The "Well to Wheel" (WTW) CO₂e emitted by the London fleet is estimated to be 7,259 tonnes
- Over the same distance, the average UK car and van would have emitted 8,961 tonnes WTW CO₂e

- This represents a reduction of 19% or 1,702 tonnes CO₂e, compared to an average UK vehicle
- This is approximately the equivalent of the lifetime CO₂e absorption of 3,800 trees



3,800

Car club carbon savings are approximately the equivalent of the lifetime CO₂e absorption of 3,800 trees

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 London 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:

- An average net decrease of 620 miles (2018 report)
- An average net decrease of 570 miles (2017 report)

Electric car adoption



59%

of respondents reported having used an electric vehicle



11%

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
39%

were satisfied with charging points

Car club fleet



3,449
cars



437
vans

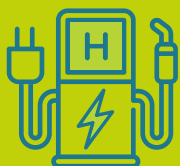
FUEL PROFILE



87%
petrol
cars



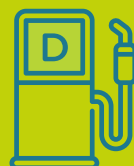
9%
petrol
hybrids
cars



2%
plug in
hybrids
cars



11%
electric
cars



0%
diesel



Since 2017/18 there has been a 24% increase in the proportion of electric cars in the London car club fleet.

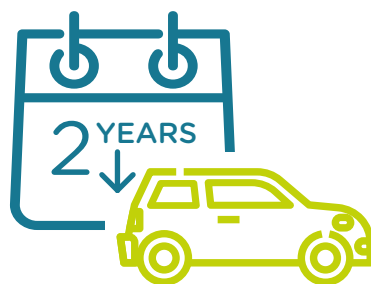
Vans have a near equal split between diesel and petrol power, which differs significantly from the British average of 96% of vans being diesel.⁸ Only 0.5% of the vans are electric due to the lack of availability of pure electric medium vans on the market.⁷



⁷ Department for
Transport, VEH0403

Car age

- 67% of cars and 99% of vans are under two years old
- No cars or vans are aged five years or older
- Vehicles are significantly newer than average UK cars and vans, both of which have an average age of 8.3 years^{8, 9}
- 67% of cars disposed of were more than 8 years old



67%

of cars are two years old or younger

Low Emission & Clean Air Zone Compliance



100%

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

Safety



98%

of the cars achieve either a 5 or 4 star Euro NCAP rating

8 Department for Transport, VEH0211

9 Department for Transport, VEH0411

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

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