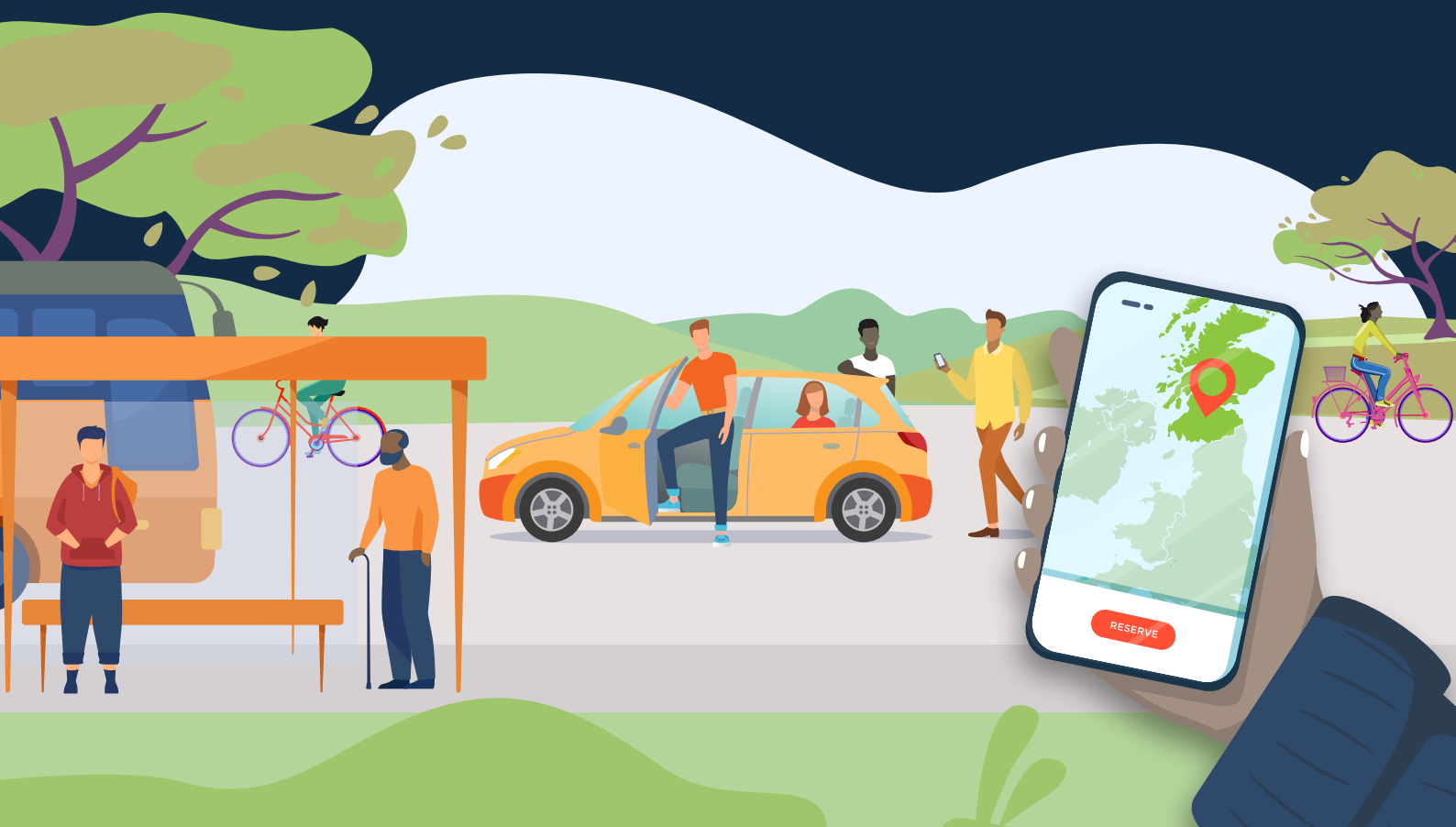


Car Club Annual Report Summary Scotland 2020



CAR CLUB MEMBERS



30,617

UP FROM 25,193

An increase of 21.5%

FLEET SIZE



515

Cars in the car club fleet

Up from 488 cars in 2019

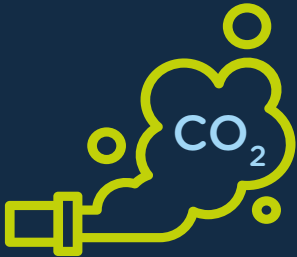
TACKLING CONGESTION



10

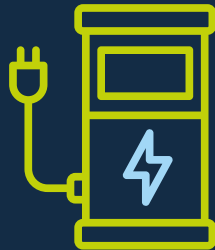
private cars taken off the road by each car club in Scotland

CARBON EMISSIONS



37%

less CO₂ from tailpipe emissions compared to the average UK car



60%

of the car club fleet are electric or hybrid

Up from 48% in 2019

AIR QUALITY

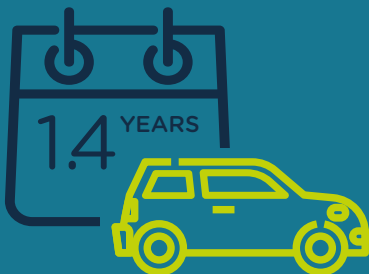


Up from 98% last year

100%

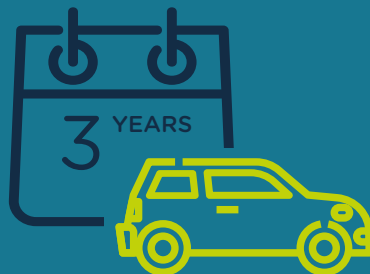
of car club cars are Low Emission Zone compliant

VEHICLE AGE



1.4YRS

Average age of car club cars



92%

of car club cars are 3 years old or younger



99%

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

Foreword

The emergence of coronavirus has upended how we work, live and travel and has had a devastating impact on lives, communities and businesses.

The car club sector has not been immune to that. After the outbreak of the pandemic, customer demand fell dramatically as a result of the travel restrictions and concerns about transmission of the virus.

This is reflected in the findings of this research, which sought to gain a better understanding of travel patterns and the travel behaviours of car club members in Scotland throughout the pandemic.

The survey was completed by 1,795 members across Scotland. When asked about reasons underlying their travel choices, 74% of respondents said that their choices were affected by Covid-19, with 33% saying they would choose the travel option which makes them feel safest in limiting their exposure to the virus.

Despite this, car club membership in Scotland continued to grow last year. There are now over 30,000 car club members in Scotland – an increase of 21.5% since 2019. This has been driven by a 50% increase in private individual memberships, which has offset a decrease of 15% in corporate members.

At the height of the pandemic, car club operators in Scotland played a crucial role in keeping our key workers moving and keeping fleets operational for the NHS, local authorities and the emergency services. Free memberships and discounted bookings were offered to NHS staff and other key workers across Scotland to enable them to travel safely. More information on car club operator's, and the wider shared transport sector's, response to Covid-19 can be found on our [website](#).

To address safety concerns and boost customer confidence, car club operators introduced enhanced cleaning regimes and the frequency of cleaning cycles were greatly increased, which added yet more operational pressure.

Setting aside the unique challenges of the past 12 months, car clubs are a vital weapon in the fight to achieve net zero greenhouse gas emissions, reduce congestion and improve air quality. The Scottish Government has set out bold actions to reduce emissions from surface transport, including a commitment to reduce car kilometres by 20%, and the phasing out of new petrol and diesel cars by 2030. Scotland's car clubs are central to this mission.

Our research consistently finds that car clubs lead to a reduction in private car ownership and use, as well as providing a much more fuel-efficient fleet than the UK average. This year's survey reveals that emissions from car club vehicles in Scotland are, on average, 37% lower than the average UK car, and 100% of car club cars are compliant with low emission zones. In addition, for each car club vehicle in Scotland, around 10 private cars are taken off the road. That's 5,177 vehicles taken off the road thanks to Scotland's 515 car club cars.

The backdrop of Covid-19 looms large over this year's report. While the analysis provides valuable insights on the impact of Covid-19 on car club member's travel behaviours, it should not be taken in isolation. As this research demonstrates, car clubs can play a significant role in decarbonising the transport sector and crucially, reducing the demand for private car use. The car club sector was growing strongly prior to the pandemic. We have every reason to believe that we will see further growth once the tremendous challenges of Covid-19 have eased.

Lorna Finlayson
Scotland Director, CoMoUK



Introduction

This is the fourteenth edition of the Car Club Annual Survey for Scotland. It 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.

CoMoUK has been collecting car club data in Scotland since 2007 to help build a strong evidence base for the sector and support its development. In this year's annual survey, the impact of Covid-19 and the restrictions in place to control its spread dominate the context of the analysis in this report.

The pandemic has 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 in Scotland. As a result, this year's report has a very different backdrop compared to previous years.

The report contains comparisons to previous years where a difference is seen, however there is a greater focus on the changes since Covid-19 and how this has impacted the sector, as well as the impact on travel behaviours.



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 two main national operators (Co-wheels Car Club and Enterprise Car Club). The members' survey was also distributed to community car clubs, but no responses were received.

The data was collected in three parts:

- A members' survey was completed by 1,795 members across Scotland. The survey collected data on individual members' use of a car club, perceptions of the impact of the service on their travel patterns and the effects of Covid-19 on usage.

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

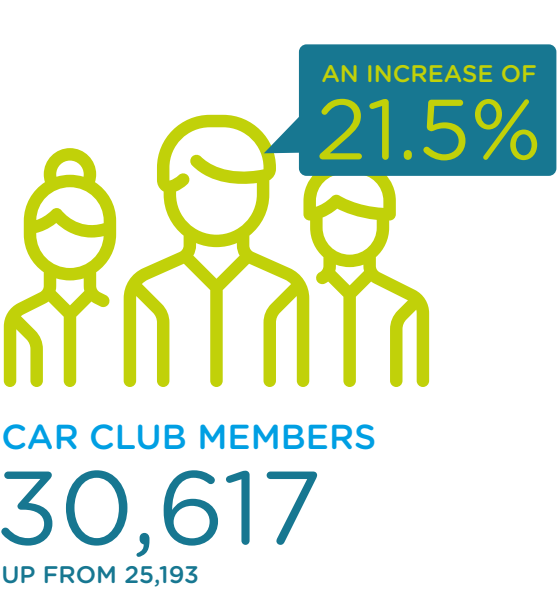
This summary report provides an overview of the key findings. A full report detailing the methodology and data is available on request by emailing scotland@como.org.uk.

Car club membership: membership growth

Despite the disruption to travel patterns as a result of the pandemic, membership of car clubs in Scotland continued to grow in 2020. There are now 30,617 car club members in Scotland up from 25,193 in 2019 – an increase of 21.5%. This has been driven by a 50% increase in private individual memberships to 21,216, which has offset a decrease of 15% to 9,401 corporate members.

In the last year:

- Overall the number of car club members in Scotland has increased by 21.5% to 30,617, of which 11,766 were active members
- The number of individual, private members has increased by 50% to 21,216
- The number of corporate members decreased by 15% to 9,401





Impact of Covid-19

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

Car club operators played a vital role in keeping key workers moving at the height of the pandemic but usage by the general public fell sharply due to the travel restrictions and concerns about virus transmission. The survey sought to gain a better understanding of travel patterns and travel behaviours of car club members in Scotland throughout the pandemic.

Impact on travel habits

When asked about reasons underlying their travel choices, 74% of respondents said that their choices were affected by Covid-19, with 33% saying they would choose the travel option which makes them feel safest in limiting their exposure to the virus.



74%

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



33%

of respondents said they would choose the travel option that makes them feel safest

Reason for use

The primary reasons for selecting a car club for a recent journey was carrying luggage/bulky items (18%), lack of any public transport option (14%) and journey would have taken too long/too many changes using public transport (14%).

Reasons for choosing a car club:



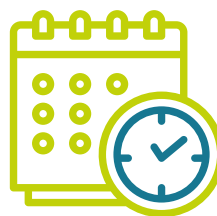
18%

carrying luggage/
bulky items



14%

lack of any public
transport option



14%

public transport
would have taken
too long/too many
changes

Impact on past travel choices

Our research has consistently found that car club members tend to walk and cycle more. In the last six months, nearly 60% of respondents said they had walked three times a week, and 25% had used a bicycle as frequently.



60%

of respondents said
they had walked
three times a week



25%

of respondents said
they used a bicycle
three times a week

Environmental benefits of car clubs

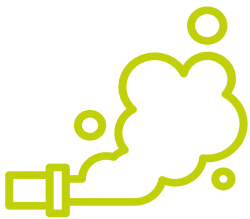
Reducing carbon emissions and improving air quality

Car club vehicles are far less polluting than the average car on Scotland's roads. Emissions from car club vehicles in Scotland are, on average, 37% lower than the average UK car, and 100% of car club cars are compliant with low emission zones.

A total of 2.5 million miles were driven in car club cars in Scotland in 2020 - a reduction of 1.7 million miles (40%) from

2019, which was undoubtedly as a result of the travel restrictions and significantly reduced demand during spring and summer 2020.

By making these journeys in a car club vehicle rather than an average UK car, 269 tonnes of CO₂ were saved.



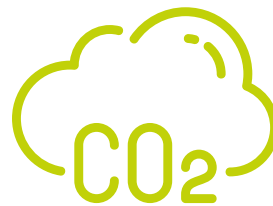
37%

less CO₂ from tailpipe emissions compared to the average UK car



100%

of car club cars are Low Emission Zone compliant



269

tonnes of carbon saved from driving more fuel-efficient cars

Tackling congestion

For each car club vehicle in Scotland, around 10 private cars are taken off the road. That's 5,177 vehicles off the road thanks to Scotland's 515 car club cars. This is based on the number of cars sold or disposed of since joining the car club, and those who deferred buying a car because of joining.



10.1

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



5177

private cars sold, disposed of or deferred purchase

Use of electric vehicles

59% of respondents reported having used an electric vehicle, an increase from 52% in the 2019 survey. Over 80% were satisfied with the experience, comfort and performance of the vehicle. They were, however, less satisfied with their experience of using charging points (39%).



Car club fleet

There are 575 car club vehicles operating in Scotland - 515 cars and 60 vans. The number of vehicles reduced slightly between March and June, when restrictions to tackle Covid-19 were first in place, but have since recovered to the levels seen at the start of the survey period.

All vehicles are 100% Low Emission Zone compliant, and 99% of car club cars have a 5 star or 4 star Euro NCAP rating.

60% of the car club fleet is either battery electric (BEV), plug-in hybrid or petrol hybrid, up from 48% in 2019. Overall, 18% of the car club fleet is electric, 1% is plug-in hybrid (PHEV), with a further 41% petrol hybrid.

This compares to 15% electric, 2% plug-in hybrid, and 31% petrol hybrids in 2019.

The average carbon tailpipe emission was 107.9g/km, making it 37% lower than the average UK car.

Car club fleet

FLEET SIZE

In the fleet there are:



515
Cars

Up from 488 cars in 2019



60
Vans



100%

of cars and vans are low emission zone compliant

FUEL PROFILE



41%
petrol
hybrid



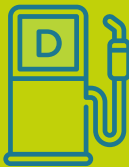
40%
petrol



18%
electric



1%
plug-in
hybrid



0.4%
diesel

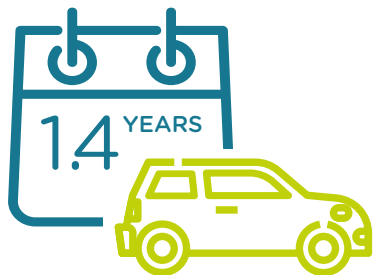


0.4%
hydrogen
fuel cell



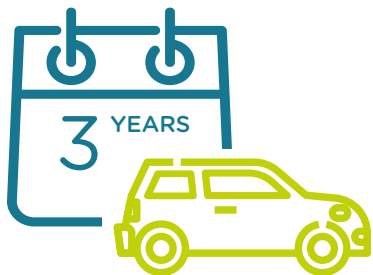
A total of 60% of the fleet are electric or hybrid

VEHICLE AGE



1.4YRS

Average age of car club cars



92%

of car club cars are 3 years old or younger



99%

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



Data, contacts and further information

The 2020 Car Club Annual Survey for Scotland 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, Enterprise Car Club and Co-Wheels Car Club. The members' survey was also distributed to community car clubs, but no responses were received.

A full report detailing the methodology and data is available on request by emailing scotland@comouk.org.uk.

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 are funded by transport Scotland to support the development of shared transport in Scotland and we work closely with local, regional, transport and national authorities. Our accreditation schemes for car clubs and bike share provide a set of standards for operators and provide local authorities with assurances when procuring services.

We want transport to be cleaner, safer, healthier, greener, cheaper, more convenient, and more inclusive.

At CoMoUK we are proud of our team of shared transport experts. We have several members of staff who have knowledge and experience of shared transport modes and can provide bespoke advice. In addition, there are team members who can help with project management, research, planning and policy. All of this ensures that we can offer the best support and advice across the shared transport sector.

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: scotland@como.org.uk

Web: www.como.org.uk

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

Registered office:
Thorn House,
5 Rose Street,
Edinburgh, EH2 2PR

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

