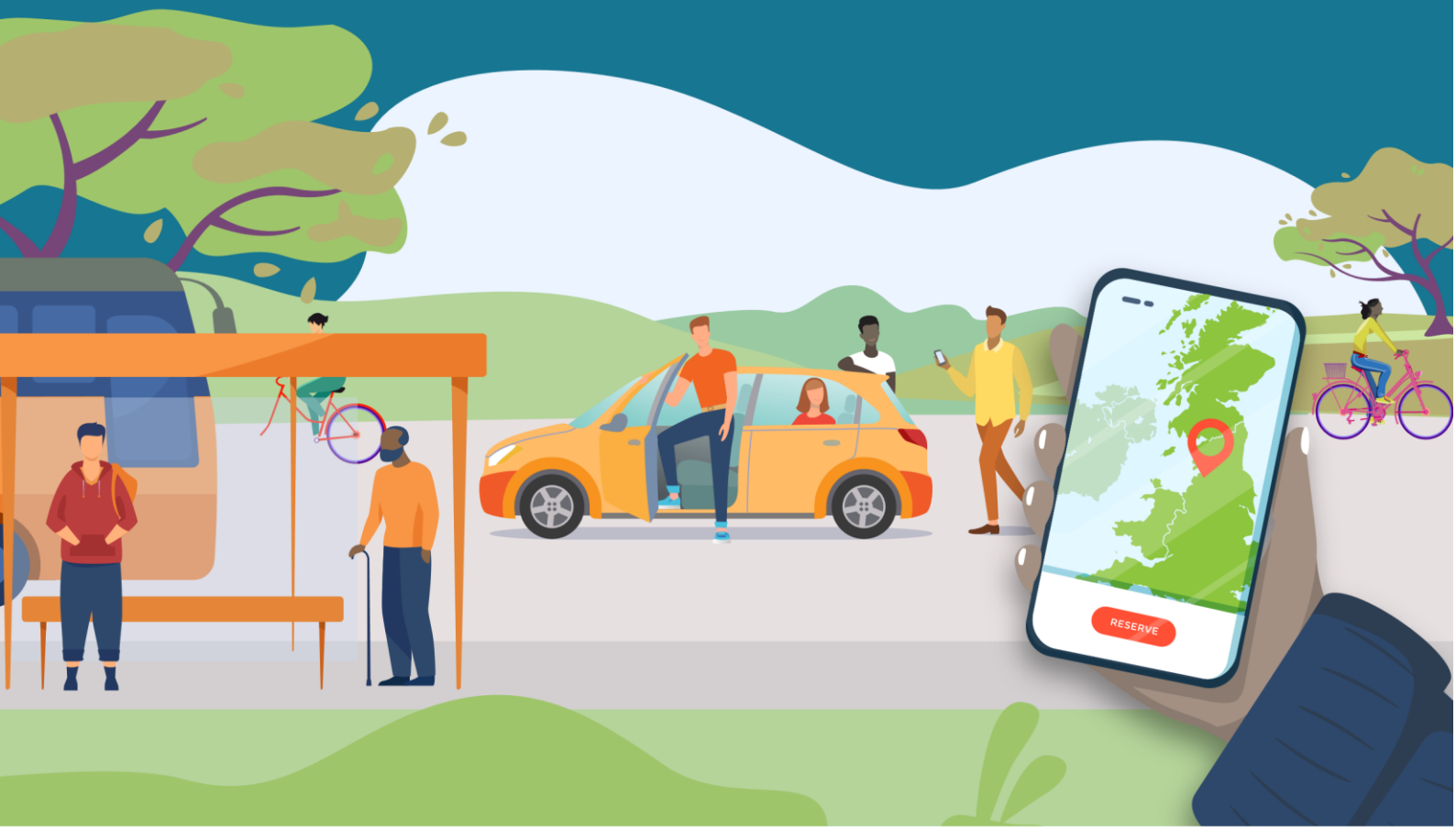
Annual Report Summary

Car Club Annual Report Great Britain 2020



Department for Transport

Interreg North Sea Region SHARE-North European Regional Development Fund

EUROPEAN UNION

SHARE North

comouk supporting shared transport

Key findings

ACTIVE CAR CLUB MEMBERS

229,464[1]

Total members: 634,606

FLEET SIZE

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

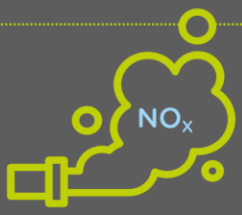
575 in Scotland

3,887 in London

1,598 in the rest of England and Wales

AIR QUALITY

100% of publicly available[2] car club cars are ULEZ, LEZ and CAZ compliant. (Ultra / Low Emission and Clear Air Zones)



89%↓ lower NOx emission than the UK average car

72%↓ lower PM2.5 emission than the UK average car[3]

CAR AGE

1.6YRS Average age of car club cars

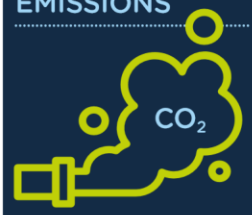
COST SAVINGS

20% of respondents stated that they couldn't afford to own a car, and this was their reason for joining the car club

REDUCING PRIVATE CAR OWNERSHIP

18.5 private cars taken off the road by each car club in Great Britain

CARBON EMISSIONS



26.5% less emissions for the average car club car compared to the average UK car

ELECTRIC CARS

46% of respondents reported having used an electric vehicle

10% of the cars are electric. By comparison, less than 1% of cars in the UK are electric vehicles[4]

80% were satisfied with the electric car club experience

ONLY 31% were satisfied with charging points

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

2 Excludes 6 cars in closed pool fleets

3 Particles that have diameter less than 2.5 micrometres

4 Department for Transport, VEH0105 and VEH0132b

comouk supporting shared transport

Foreword

It gives us at CoMoUK great pleasure to present this 2020 car club research. This overall report is published alongside reports covering Scotland, England and Wales outside London and London 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 Interreg 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 British 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 than purchase or lease;

Based on this evidence, we contend that this set of interlocking virtuous circles are what the future of transport emissions in Britain 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 any 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 Britain 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

The 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 operators (Zipcar, Enterprise Car Club, Ubeeqo, CoWheels and Hiyacar).

The data was collected in three parts:

- A car club member survey completed by 10,245 respondents. 4,987 were from England and Wales outside London, 3,463 from London, and 1,795 from Scotland
- 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 Great Britain was growing. Total membership has grown by over 100% to more than 600,000 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 229,464 active members.

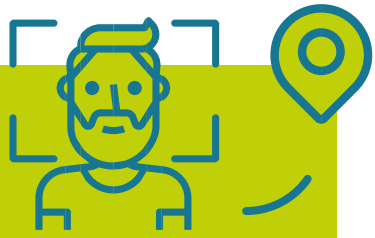
Impact Covid-19 on travel habits

The Covid-19 pandemic has had a profound impact on how we live, work and travel. As usage by the public of course fell during lockdowns. This research has sought to understand travel behaviours of car club members throughout the pandemic.

Car club operators played a vital role in keeping key workers moving while their a result, the car club sector in Great Britain faced significant challenges in 2020.

76% of respondents said their travel choices were affected by Covid-19

37% 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 (68%) and a further 12% between 6-8 trips per year

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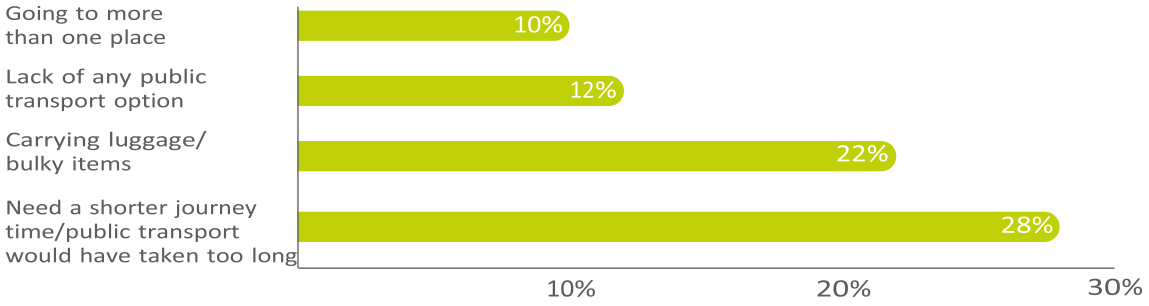
Reasons for car club use



" I don't have a car and use the club car week I had a driving myself gives me flexibility along. There convenient than walking or using public transport."

Tracey, Aberdeen

" I had s
opping to transport, the cost to do my shopping. This
ew things to get and a few places to and
is easier and more to alter my plans as I go
no waiting involved, and I can visit
several places efficiently and quickly."

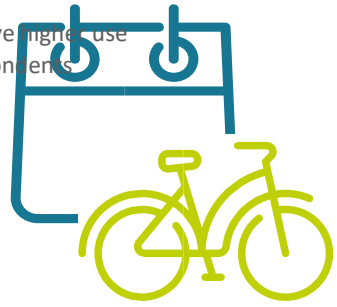
Elizabeth, Birmingham

Use of other modes

Our research has consistently found that car club members tend to have higher use of sustainable modes than national (dependent on the region) of respondents

3x

averages. In the last six months, 56-60%



have walked three times a week, and 25-30% have used a bicycle as frequently. On average in England and Wales 14% of people cycle more than once a week[5].

Due to Covid, use of public transport is much lower than usual in 2020 although previous reports indicate this is higher than national averages.

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

5 National Travel Survey 2019

Environmental benefits of car clubs

Reducing private car ownership

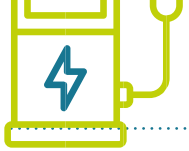
Car clubs replace privately owned cars with a smaller number of more efficiently used vehicles freeing up street space for other uses. When combining the percentages of respondents who had either reduced the number of cars they owned or deferred a purchase we can estimate that 18.5 cars are removed per car club vehicle.

21%

owned one car said that said that fewer when they they would have joined a car club bought a car if they had not joined car club

22% 18.5 99,355

Improving air quality

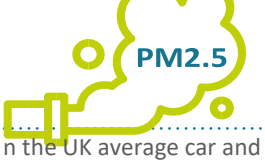


10%

of the car club fleet are electric vehicles[6]

89%↓

This is an 89% reduction in the UK average car and van, with car clubs achieving 72% and 90% reductions, respectively



PM2.5 emissions are also significantly lower than average car and van, with car clubs achieving 72% and 90% reductions, respectively

6 Department for Transport, VEH0105 and VEH0132b

7 www.naei.beis.gov.uk/

Greenhouse gas emissions

Reporting on the well-to-wheel (WTW) carbon dioxide equivalent (CO_2e) emissions which include the emissions from producing, transporting, and combusting fuel and electricity, cars and vans in Great Britain's car clubs have lower emissions than average UK vehicles.

- The average car club car has emissions which are 26.5% lower than the average car on the UK's roads
- The WTW CO_2e emitted by the fleet is estimated to be 9,670 tonnes
- Over the same distance, the average UK car and van would have emitted 12,179 tonnes WTW CO_2e

08

private cars estimated total replaced by number of cars each car club removed from vehicle in UK roads the UK

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 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:

Electric car adoption

- This represents a reduction of 21% or 2,509 tonnes CO_2e, assuming all car club journeys would otherwise have been undertaken by another vehicle
- This is approximately the equivalent of the lifetime CO_2e absorption of 5500 trees

72%

lower than a

5500

Car club carbon savings are approximately the equivalent of the lifetime CO_2e absorption of 5500 trees

England and Wales members

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

of respondents reported having used an electric vehicle

of the cars are electric, while by comparison, less than 1% of cars in the UK are electric vehicles

were satisfied with the electric car club experience

were satisfied with charging points

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

London members

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

46% 10% 80% ONLY 31%

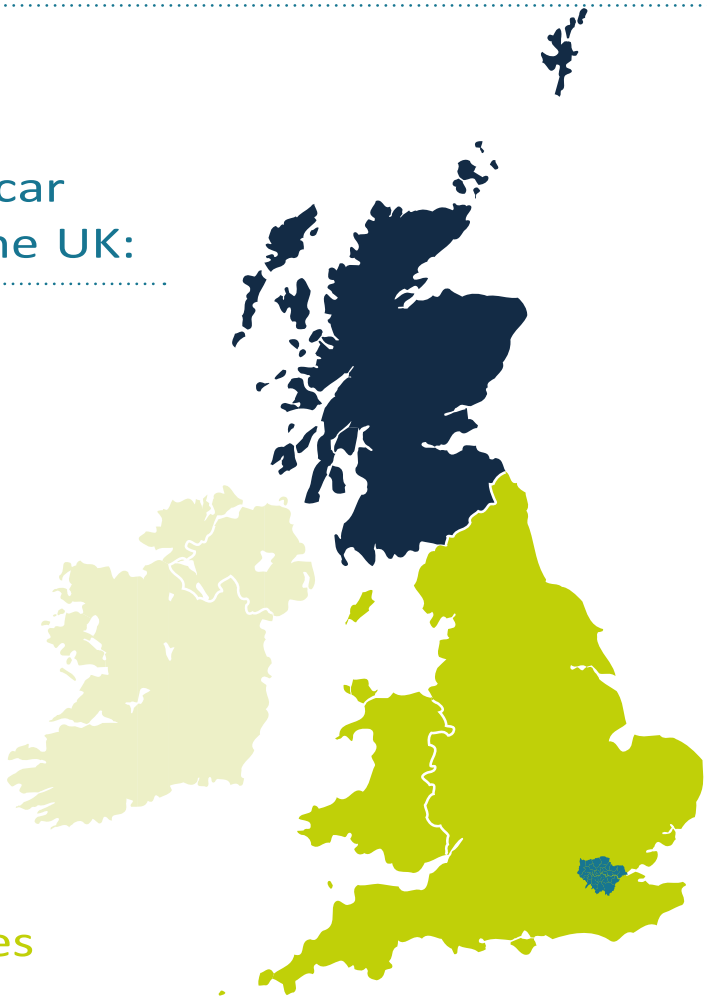
Car club fleet

Fleet size: 6,060 car club vehicles in the UK:

575
in Scotland

3,887
in London

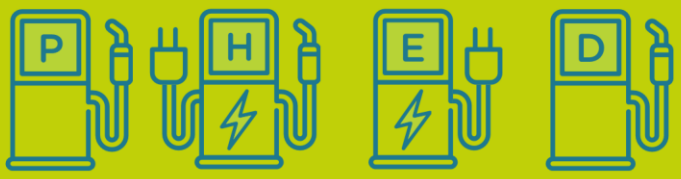
1,598
in the rest of England and Wales



5,370
of these are cars

690
of these are vans

FUEL PROFILE



67% petrol

22% hybrid

10% electric

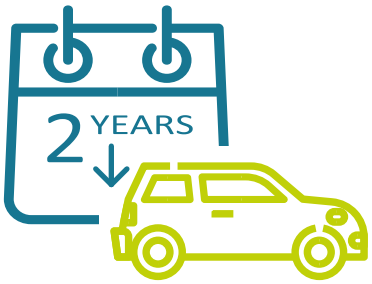
1.5% **diesel,** all of which are in closed or corporate schemes and so are not available to the general public

68% of Britain's car club vans are diesel fuelled, which differs significantly from the British average of 96% of vans being diesel.[8] Only 1% of the vans are electric due to the lack of availability of pure electric medium vans on the market.

8 Department for Transport, VEH0403

Car age

- 91% of vans are two years old or younger
- Less than 1% of the total fleet is 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[9, 10]
- 80% of cars disposed of were at least 8 years old



69%
of cars are two years old or younger

Low Emission & Clean

Air Zone

Compliance

LOW EMISSION ZONE

100%

of cars in the public fleet[11] are Euro 6 and therefore compliant

Safety

★★★★☆

98%

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

9 Department for Transport, VEH0211

10 Department for Transport, VEH0411

11. With the exception of 6 cars in closed pool car schemes

www.como.org.uk

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.

Get in touch

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