

CoMoUK Annual Car Club Report UK

2025



Key findings 2025

CAR CLUB MEMBERS



337,047 active users

297,462 active private users

39,585 active corporate users

FLEET SIZE



5,549 vehicles

4,263 of which were publicly accessible (not for corporate use)*

REDUCING PRIVATE CAR OWNERSHIP



23 cars

On average, each car club vehicle in the UK replaced 23 private cars. One car club car in London replaced 28 private cars. Outside London, one car club car replaced 16 private cars.

FREEING UP PUBLIC SPACE



300 miles

Car reduction by car clubs frees up 300 miles (480 kilometres) of kerbside space, further than the distance from London to Newcastle, which can now be used for other purposes.

REDUCING CAR MILEAGE



2,112 miles

After joining a car club, each car club user, on average, reduces their total car mileage by 2,112 miles per year, leading to a greenhouse gas reduction of 510 kg of CO₂e per user.

LOW CAR LIFESTYLES



78%

of active users (operator definition) used the car club between 1 and 5 times a year

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



69%

of users either agreed or strongly agreed that a need to carry bulky items was a motivating factor for car club user



49%

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

ACCESS TO OPPORTUNITIES



22%

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



17%

of car club users used car clubs for journeys that they would not have been able to make otherwise

* Pre-dates withdrawal of Zipcar's 2,575 vehicles from the UK market by the end of 2025

CONSISTENTLY HIGH CUSTOMER SATISFACTION



90%

of car club users were satisfied or very satisfied with the process of booking a car club vehicle



>85%

of car club users were satisfied or very satisfied with the process when first joining a car club

COST SAVINGS



31%

of car club users agreed that the car club is cheaper than other travel options



£2,800

is saved on average by an individual when using a car club as a direct replacement for owning and maintaining one private vehicle

SUSTAINABLE TRAVEL CO-BENEFITS



32%

of active car club users were using a bicycle at least once a week (29% in London, 34% outside London), compared to a national average of 13% in England¹



32%

of car club users were using a train at least once a week (49% in London, 23% outside London), compared 10% of the English population²



48%

of active car club users were using a bus at least once a week (62% in London, 40% outside London), compared to a national average of 23% in England³

FLEET ELECTRIFICATION



28%

of publicly available car club cars were electric



49%

of car club users have used a fully electric car club vehicle (compared with 52% in 2024)



21%

of electric car users were satisfied or very satisfied with charging electric car club vehicles mid-hire



38%

of electric car users were satisfied or very satisfied with charging electric car club vehicles at the end of a hire

LOWER EMISSIONS AND CLEAN AIR



100%

of car club cars were compliant with low emission zones in 2025



~100%

of cars were under 5 years old as of September 2025



50%

of car club vehicles in the UK were under 2 years old as of September 2025

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

2 NTS0313

3 NTS0313

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Front cover image: Enterprise Car Club

Foreword

Welcome to the CoMoUK Car Club Annual Report for 2025, the latest in our long-running series of insights into car club use and its social, environmental and economic impacts in the UK.

2025 proved to be a challenging year for the UK car club sector. A long-term trend of costs increasing faster than revenue erupted with the exit of Zipcar from London and, therefore, the UK market by the end of 2025. This removed 92% of London's car club fleet and 46% of the national car club fleet.

2025 was also the second consecutive year in which the share of electric vehicles (EV) in the UK's car club fleet decreased. While still substantially higher than the share of EVs in the UK's car fleet overall (2% of all privately owned cars), the share of EVs among publicly accessible car club vehicles fell from 29% in 2023, to 25% in 2024 and only 23% in 2025.

CoMoUK continues to work hard with all stakeholders across public and private sectors to improve on this situation at both the London and national levels – not least because car sharing continues to grow strongly in many other European markets. We are pleased to see the UK Government recognising the role of car sharing to a greater extent than ever before in the [Better Connected strategy](#) and [Local Transport Plan Guidance](#).

Against this backdrop this report is a wake up call to policy makers across the UK to address the challenges that car clubs are facing here and to, again, help maximise the positive impacts that car clubs have on their users, the environment and the transport system, and that are impressively outlined in this report.

As you will discover in these pages, car sharing remains popular and of huge importance to its users. As in previous years, users of car clubs show levels of active travel and public transport use that are substantially above the UK average, while they drive cars significantly less often. The data underlying this report shows that car club users accumulate 45% fewer car miles per year than the English average population, accounting for all trips made by private cars, taxis and car club cars. This amounts to a reduction in greenhouse gas emissions of 510 kg of CO₂e per car club user per year.

For the first time this year, this report also provides evidence for the cross-fertilising effects of co-locating car clubs with shared micromobility, making a strong case for the integration of these shared modes and for their linking with public transport and active travel under the umbrella of mobility hubs.

With these encouraging impacts of car clubs in mind, we look forward to continuing to work with you in the year ahead to reverse the challenging trends that car clubs have been facing and to help car sharing succeed yet again. As you read this latest of our annual reports, please do bear in mind that the research was conducted before Zipcar's exit from the UK, and does not reflect many of the challenges that have since emerged.

Richard Dilks

Chief Executive, CoMoUK



Introduction

Car clubs give people access to cars without the costs or other obligations of owning or leasing one. Most car clubs operate on a membership basis, with members paying an annual or monthly fee and then paying per hour to use cars.

Over the last 18 years, CoMoUK has collected a range of data from car clubs about the characteristics of their users and information on their fleets, as well as surveying car club users about their travel behaviour, user satisfaction and other aspects of car club use. Consistently, we have been finding that car clubs offer a range of economic, social and environmental benefits to society and to individual users.

This UK CoMoUK Car Club Annual Report 2025 presents data collected from car club operators for the period 1 October 2024 to 30 September 2025 alongside data from our car club user survey, collected in November and December 2025. This data was collected from the main UK car club operators (Zipcar, Enterprise Car Club, Co Wheels and the car club section of Hiyacar) and from smaller community-run car clubs. The research has been carried out by CoMoUK with input and contributions from car club operators, and has been verified by Youxin Lin from the School of Civil Engineering at the University of Leeds.

Methodology

The data was collected in two parts:

- A car club user survey, which was completed by 6,116 respondents from all four UK nations. 5,038 respondents were active users as per the definition given below. The remaining 1,078 had not used a vehicle in the last 12 months.
- Of those active users, 4,579 are defined as private users, and 446 used the car club for business purposes.
- 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 2025; and
- were using car clubs for private purposes (either exclusively or alongside business use).



Hiyacar

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. The presented percentages were rounded to integers while calculations were done with real numbers. This leads to minor discrepancies within the presented data.

Car club fleet and membership numbers in the UK

Fleet size based on operator metrics

By the end of September 2025, the total UK car club fleet comprised of 5,549 vehicles, a 1% increase compared to the previous year. In 2025, 4,263 car club vehicles were available to the public at least part of the week, with the remaining 1,286 vehicles reserved for corporate customers.

The largest share of the UK car club fleet was concentrated in London, with 2,711 publicly available vehicles and 87 corporate vehicles being located in Greater London. Altogether, London accounted for 50% of all UK car club vehicles in 2025.¹ This London weighting is highlighted when calculating the availability of vehicles by region. In London, as of

September 2025 there were 2.95 publicly available vehicles per 10,000 inhabitants. This drops to 0.71 in Scotland, and further to 0.23 vehicles per 10,000 in the rest of England.

The number of publicly-available car club vehicles in 2025 was 21% lower than before the pandemic (as there were 5,385 vehicles in 2019). However, the number of active car club users has grown by 167% in the same period (see section on Car Club Membership). This reflects a trend towards operators making more efficient use of existing vehicles.



¹ This data pre-dates the announcement of Zipcar leaving the UK and so includes the Zipcar fleet. Zipcar's exit means the loss of 2,575 cars and vans from London. We are working hard with other operators, London boroughs and other stakeholders to replace as many of these as possible. Please see [CoMoUK's advice on the Future of car clubs in London](#).

Membership trends based on operator metrics

There was a total of 337,047 active users reported by operators as of September 2025,¹ with 236,543 in London and 100,504 in the rest of the UK. The UK-wide number of active users includes 297,462 active individual users and 39,585 active corporate users.

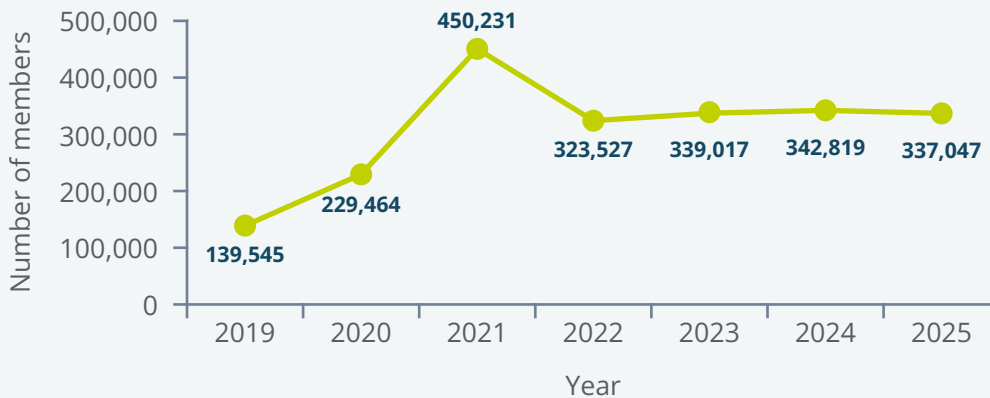
Compared to 2019, the number of active car club users in the UK in 2025 has more than doubled, with an increase of 137%. However, between 2024 and 2025, the number of active car club users fell, by 1.7% in 2025. This is the first year since 2022 where the number of active users decreased during the year.

It is important to note that these figures represent total membership numbers across operators. Some people may be members of more than one car club. At the same time, some households will have more than one person benefitting from one membership. On average, in 2025, according to operator definitions, there were 79 private active car club users in the UK per publicly available car club vehicle.



Co Wheels

Growth in UK car club membership (2019-2025)

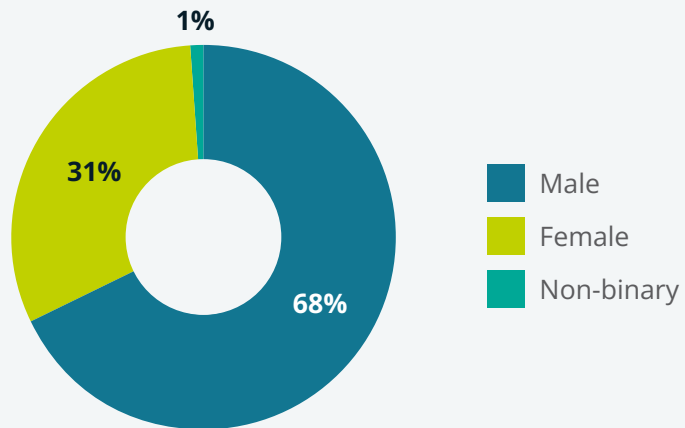


¹ Please note that the definition of active car club members as provided by car club operators differs slightly from the definition used for survey respondents. For operator metrics, members who have not hired a car but renewed their car club membership or made another financial commitment to the operator in the last 12 months are also considered to be active members, and the 12 month period is October 2024 to September 2025.

Demographic overview of car club users

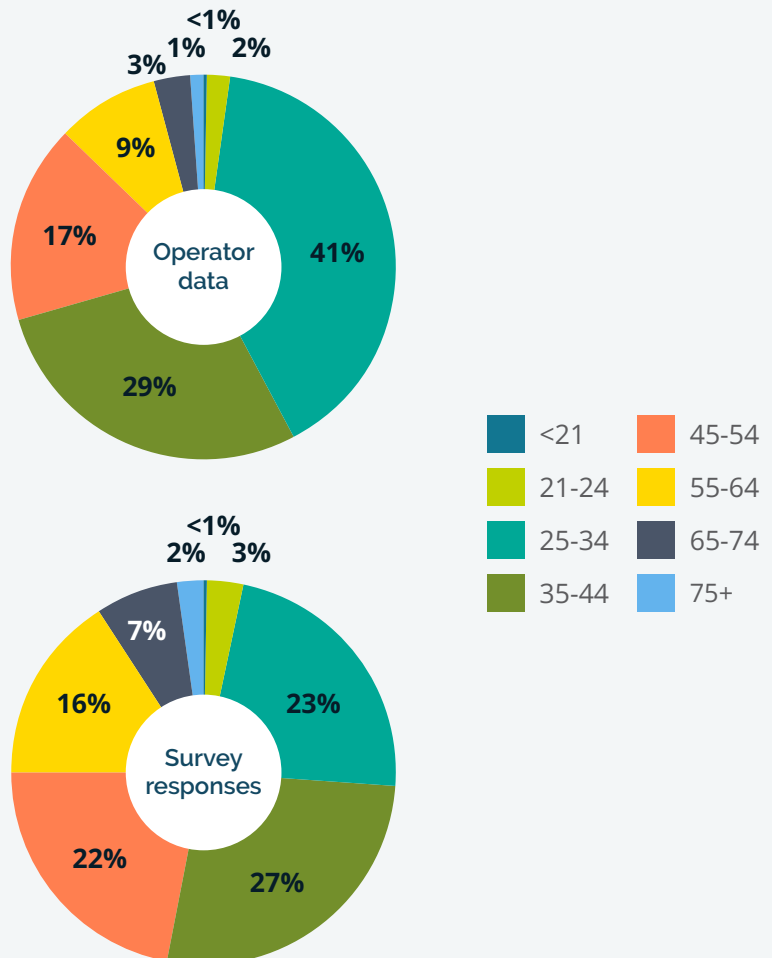
Gender

Among active private car club users, 68% identified as male, 31% identified as female and 1% identified as a non-binary. This gender gap is also reflected, albeit to a lesser degree, by the overall population of drivers: in 2024, 80% of men in England aged 17 and over held a driving license, while only 71% of women did so.¹



Age

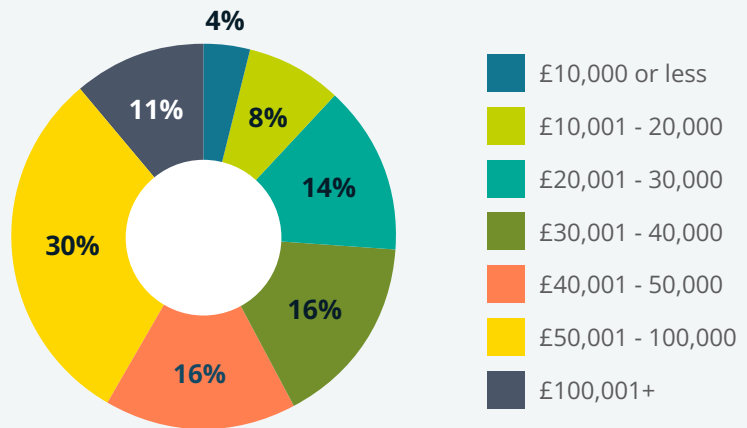
Operator data indicates that 41% of all active, private car club users in the UK are between 25 and 34 years old. Our survey sample is more evenly distributed across age brackets, as can be seen in the pie chart.



¹ [DfT: National Travel Survey: Driving licence holding and vehicle availability, NTS0201.](#)

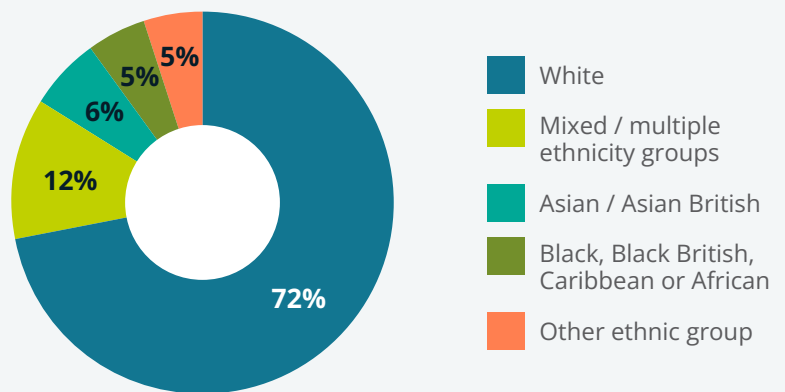
Income

Among those survey respondents who disclosed their income, there was a concentration of private active users in higher income brackets, with 41% of active car club users indicating that their personal gross annual income is more than £50,000, including 11% of users who stated that their personal gross annual income is more than £100,000. At the same time, 26% of users stated that their gross annual income is £30,000 or less.



Ethnicity

In terms of ethnic background, 72% of private active car club users identified as white, 12% as Asian and 6% as black. 5% identified with mixed or multiple ethnic groups and 5% said that they identified with another ethnic group. According to the 2021 Census, equivalent figures for England and Wales were 82%; 9%; 4%; 3% and 2% respectively.¹ This suggests that car clubs are attracting a relatively diverse group of users, compared to Britain's general population.



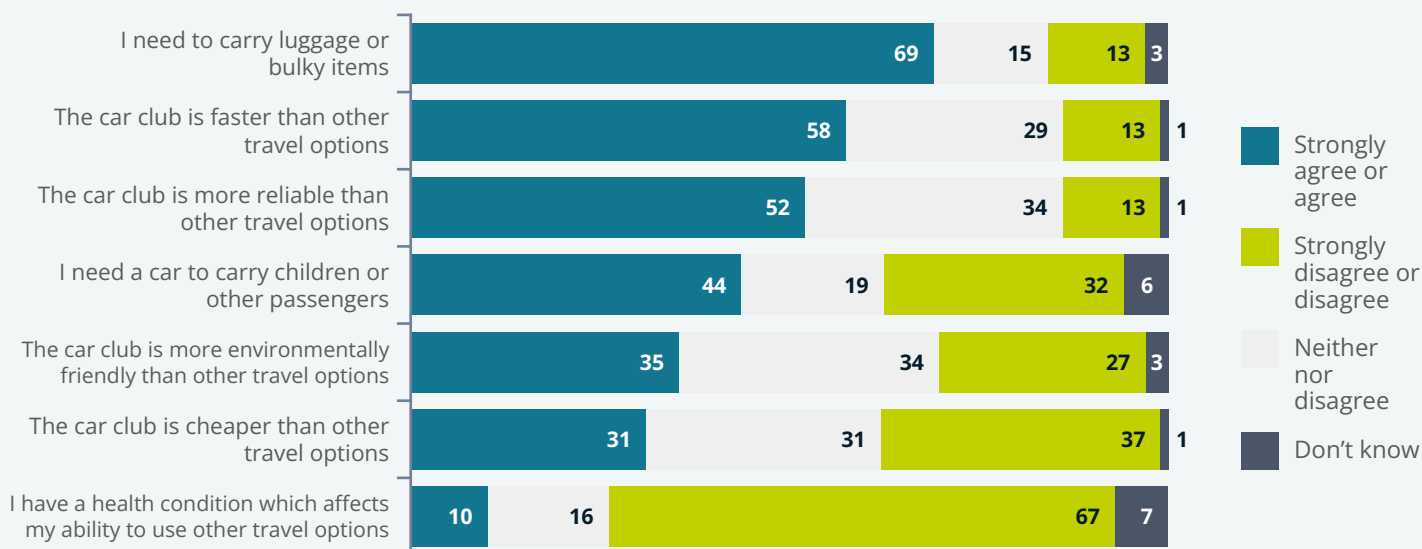
¹ [Ethnic group, England and Wales - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk).

Motivations and incentives

The survey asked about users' motivations for joining a car club. Respondents were presented with a set of common motivations for car club use and asked to evaluate how relevant each motivation was for them (from strongly agree to strongly disagree). The results demonstrate the broad range of benefits of car club use, and how car clubs serve as a sustainable and flexible mode of transport for a range of purposes. Over two thirds (69%) of users agreed or strongly agreed that the need to carry luggage or bulky items was a motivating factor. Users also agreed that car clubs were faster (19% strongly agreed, 39% agreed) and more reliable (12% strongly agreed, 40% agreed) than other travel options.

Other motivating factors had a more mixed response. Regarding the cost of car clubs, 31% of users either agreed or strongly agreed that it is cheaper than other travel options, while 37% disagreed or strongly disagreed with the statement. A similar picture can be seen for the environmental credentials of car club use, with 35% agreeing or strongly agreeing that car clubs are more environmentally friendly and 27% disagreeing or strongly disagreeing. Only 10% of users agreed with the statement that they had a health condition which affected their ability to use other travel options.

Motivations for joining a car club (respondents were asked about the extent they agreed with each of the stated motivations in their case) (values in %)



"I love how car clubs allow those like me who don't own a vehicle access to vehicles when they need them to haul bulky materials. Since cycling is my main form of transport, I can't use hire vehicles that can only be picked up from a specific location which is only accessible by car."

Male user from Norwich, 35-44

"We don't own a car and don't really want to at present, but being outdoors in more remote locations is important to us as a family. Since many of these places are either unreachable or difficult to reach with public transit, being members of a car club allow us to do this."

Female user from Glasgow, 25-34



69%

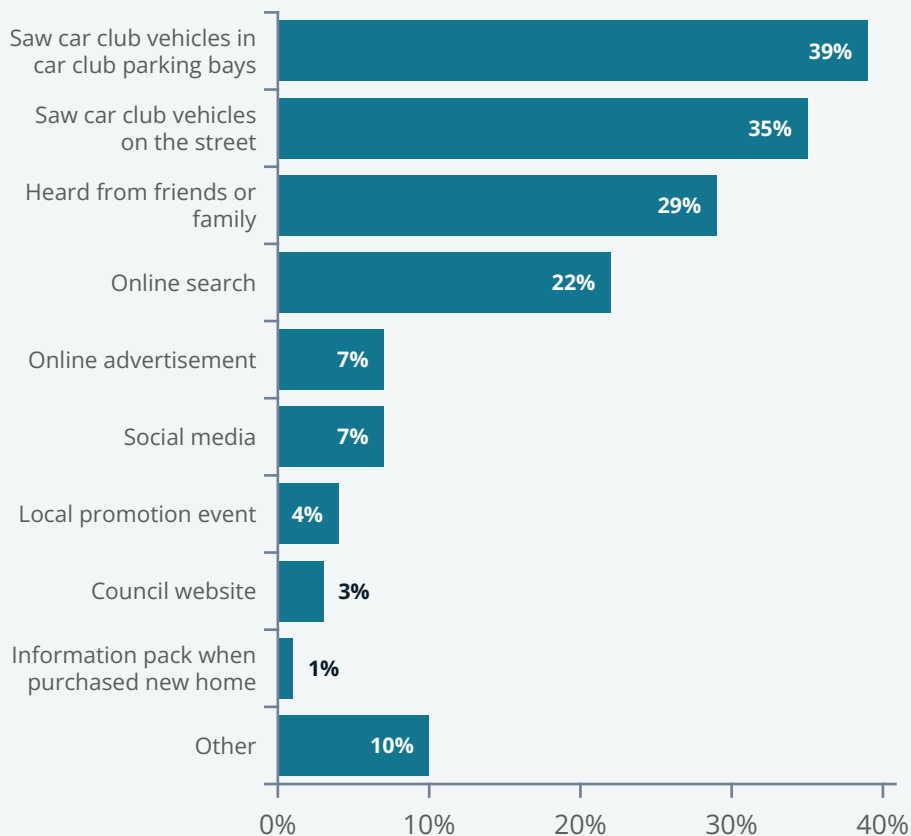
of users agreed that a need to carry luggage or bulky item was a reason for joining the car club



58%

of users agreed that the car club is faster than other travel options

Motivations for joining a car club (respondents were asked about the extent they agreed with each of the stated motivations in their case)



"Joining the car club has made my life much easier. I don't own a car, but I can still run errands, go on weekend trips, or help friends without worrying about parking or maintenance. It's convenient, flexible, and more environmentally friendly than owning a car."

Female user from London, 25-34

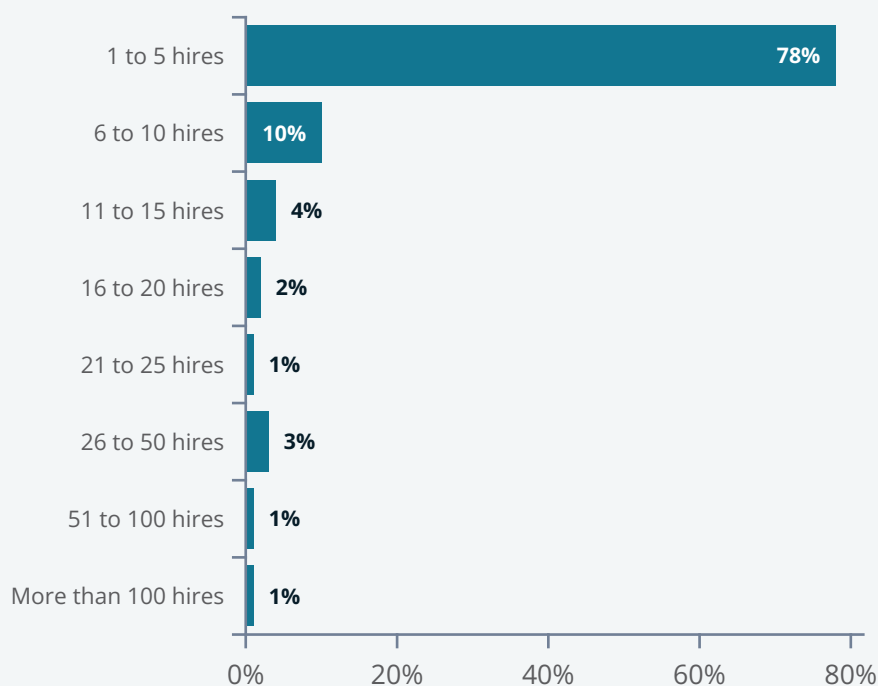
When asked about where they first heard about car clubs, with multiple answer choices possible, 39% of users said that they saw car club vehicles in car club parking bays, whilst 35% said that they had seen car club vehicles driving on the street. 29% heard about car clubs from friends or family and 22% selected 'online search'. 10% stated 'other'.

Trip frequency and purpose

Car club users are infrequent drivers. When examining operator data for the period October 2024 to September 2025 for those who had hired a vehicle at least once, 78% of individual users in the UK had used the car club fewer than 6 times over the year. Another 10% had used it between 6 and 10 times per year.

CoMoUK survey data further reveals how frequently car club cars are being used for different purposes. The most popular trip type was leisure, made at least once a week by 7% of users and monthly by 24% of users. This is followed by visiting friends/family (a combined 21% at least once a more or weekly) and shopping (also a combined 21%).

Frequency of annual car club hires per active private user (operator data)*



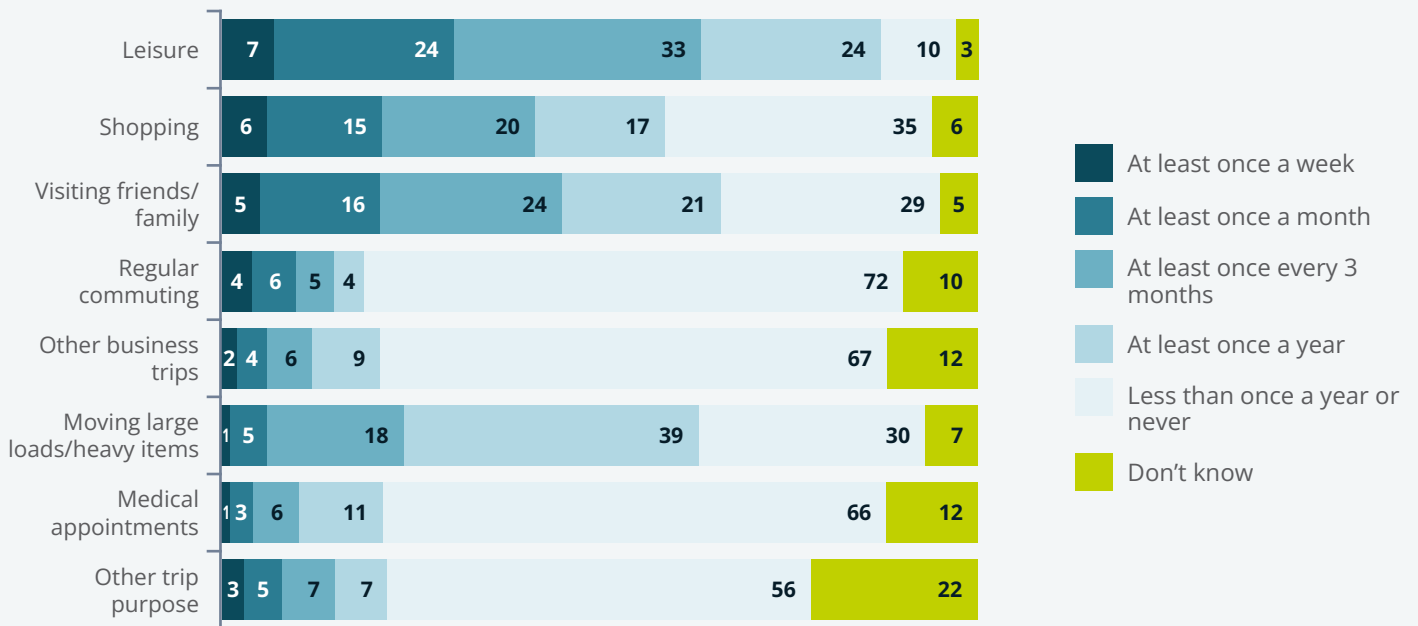
* Percentages refer to the share of active, private users (operator definition) who hired a car club vehicle for a given number of times between 1 October 2024 and 30 September 2025, excluding users with 0 hires.

"I normally don't need a car as I work in central London. But to get to places occasionally that are not well connected, either for shopping or leisure travel, I take care club hire."

Male user from London, 45-54

For all the purposes listed, the majority of car club users state that they use car clubs less than once a month. This demonstrates that, even for the most popular trip purposes, most car club users do not use car club cars frequently. This is true for both car club users who own at least one car and car club users who do not own a car (see below on car ownership among car club users).

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



31%

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



21%

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



"It gave me the opportunity to go on an adventure with my family visiting where we otherwise wouldn't have been able to go via public transportation."

Female user from Scotland (location unspecified), 25-34

Journey profile

Duration of hires

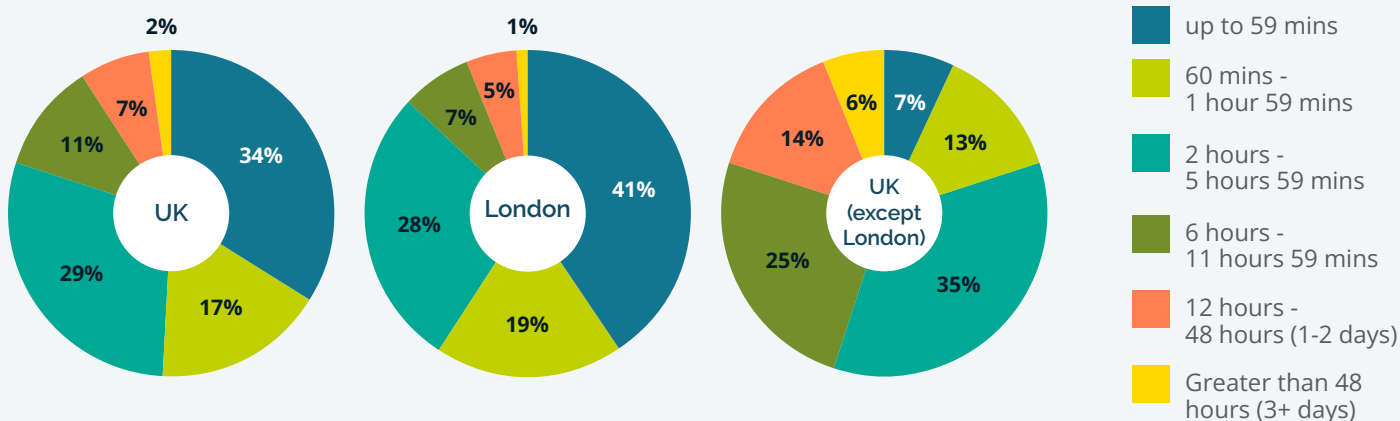
Operator data shows that car clubs are predominantly being used for shorter trips. Between October 2024 and September 2025, 34% of all car club hires in the UK lasted for less than one hour, whilst 17% lasted between one and two hours. These statistics were strongly influenced by data from London, which accounted for 78% of all car club trips and where journeys under 2 hours dominated (60%). In London, different car club models (back-to-bay and one-way) were available, accounting for, on average, shorter trip distances, whereas in the rest of the UK, back-to-bay car clubs tend to be the only available option. Outside London, the duration of car club hires was more evenly split between short, medium and long-term rentals, with only 7% lasting less than an hour. This indicates that, outside London, many vehicles were used for day or weekend trips.

"I think the car club is a great scheme as it means that I and others don't need to consider owning a car, which wouldn't get used every day. It also encourages you to think about whether you need a car, for short trips which could be made on foot or by bike/bus."

Male user from Edinburgh, 35-44

Against this backdrop, it is important to note that the average car trip for drivers in England was only 22 minutes in 2024. For car trips undertaken as a passenger, the average trip duration was 23 minutes.¹ This reinforces findings presented in the previous section that show that car clubs are not mainly used for regular trips like commuting, but are more likely to be used for irregular purposes where a car is of particular value.

Time per hire (operator data)



¹ DfT: National Travel Survey: Mode of travel NTS0303f.

Distance of hires

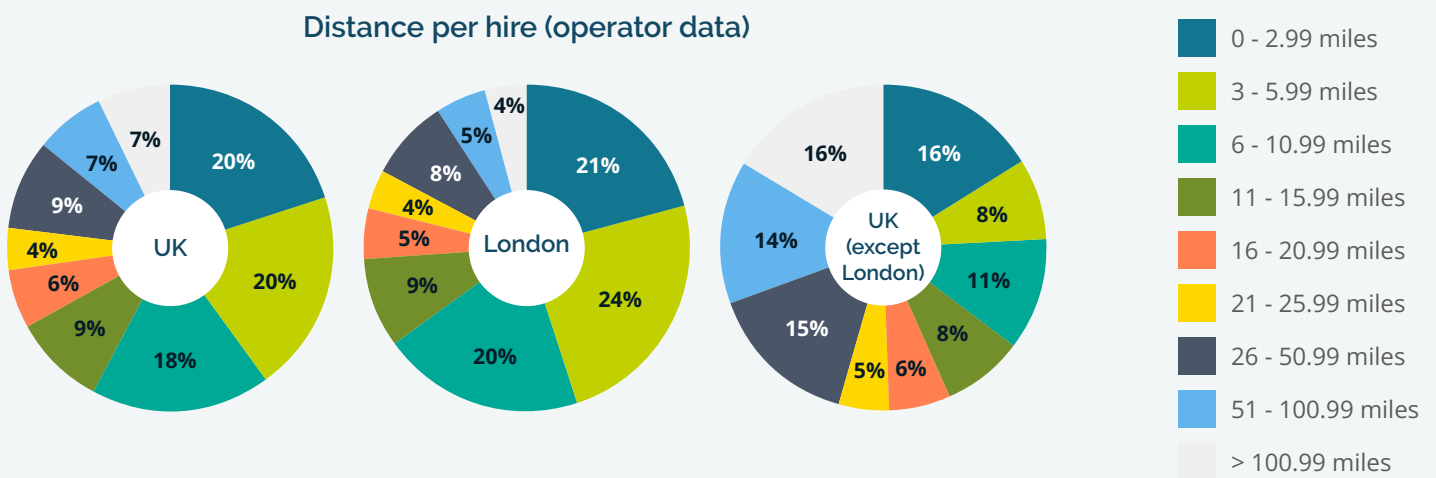
Based on operator data for October 2024 to September 2025, the estimated median distance travelled during a car club hire in the UK was 8.7 miles.¹ 58% of all hires involved travel of less than 11 miles.

Again, there is a marked difference in the journey profile between London, where one-way car club trips are available, and the rest of the UK. Outside London, only 35% of all car club hires were under 11 miles; whilst in London, this percentage amounted to 65%. For England (outside London) the median trip distance was 21.6 miles, and in Scotland it

was 21.4 miles. In London, this figure drops to 7.2 miles.

In comparison, the average distance of car trips undertaken as a driver in England overall was 8.2 miles in 2024; for car trips undertaken as a passenger, the average distance was 8.9 miles.² Thus, on average, car clubs are used for longer trips than the average UK car journey, supporting the conclusion that the shared mode offers users with a flexible transport option that is used for infrequent trips that are unsuitable for other modes of transport.

Distance per hire (operator data)



Co Wheels

1 Median calculated using cumulative frequencies and linear interpolation within the band containing the 50th percentile.
 2 NTS0303d.

Access to vehicles

Regarding the time to access a car club vehicle, 51% of users 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 20% who said that it takes them less than 5 minutes to get to the car club vehicle. 24% reported that it takes them between 11 and 20 minutes, whilst another 24% stated that it takes them more than 20 minutes. The proportions for each band are broadly similar across the UK as shown in the chart below.

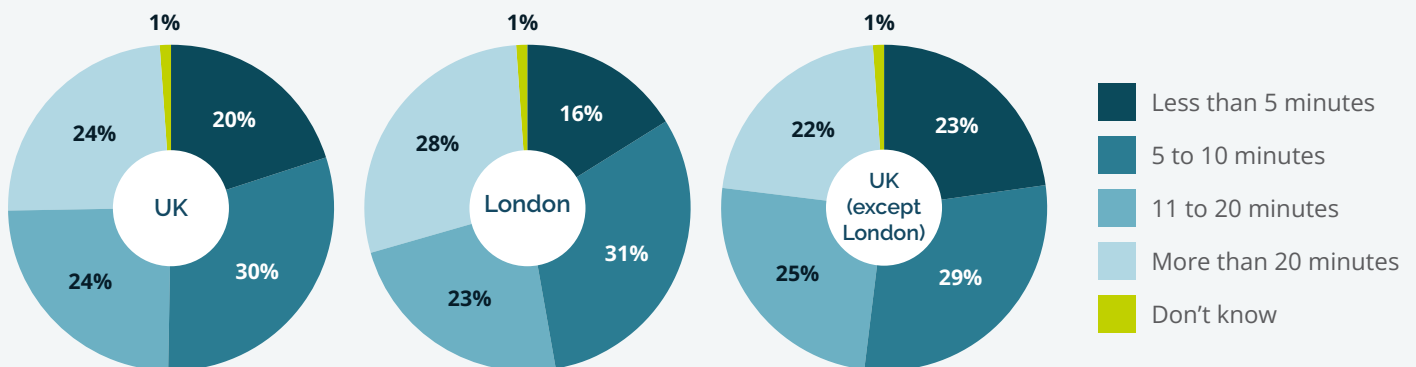
Compared to 2024, there has been an increase by 4 percentage points in the share of respondents who stated that they could access a car club vehicle in less than 5 minutes and a decrease by 5 percentage

points in those who needed more than 20 minutes to access a vehicle. This could suggest an improvement in the geographic distribution of vehicles.

"Being a member of a car club allows me to have a flexible range of travel options... The car club is perfect for transporting items or people when the family car is not available and I can't do it on the bike... One of the car club bays is 3 minutes from my work so I can often book and be driving within 5 mins."

Male user from Bristol, 55-64

Time taken by active private car club users to get from the usual starting point of their most common car club trip to the car club vehicle



Enterprise Car Club

Car club users and sustainable travel

Mode shift

Survey respondents were asked what other method of transport they would have used for their most common car club journey, if the car club had not been available. 49% stated they would have used another form of car for their most common trip if a car club had not been available. In 20% of cases, a taxi or private hire vehicle would have been used, 15% would have used a traditional hire car or van, and 14% would have used a private vehicle, either as driver or passenger. 26% of users said they would have used public transport, and only 2% would have walked or cycled. Less than 1% would have used a shared bike or e-scooter (collectively referred to as micromobility). 5% said either that they didn't know or chose 'other'.

"Having access to a car club means we don't need to own a car or rely on rental companies or taxis. It gives us the freedom to go on shorter day trips where the cost of a rental car wouldn't be worth it."

Female user from Bristol, 25-34

The car club trips that would have been made by modes of transport other than cars, or that would not have been made at all, if the car club had not been available need to be interpreted in the context of car club users' overall travel behaviour. As the next section demonstrates, car club users drive significantly less and use public transport and active travel much more frequently than the average population.

Mode of transport that car club users would mainly have chosen for their most common trip, if the car club had not been available (one choice possible)



49% 

of active users 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

"Has allowed me to get out of the city and explore where trains and buses can't take me - usually for a fraction of the price of a traditional rental."

Male user from Edinburgh, 25-34

Sustainable travel habits

Car club users reported higher rates of use of all sustainable modes of transport than the national average. This is also true when evaluating travel patterns inside and outside London (rest of England, Scotland, Wales and Northern Ireland combined) separately, despite the typically more limited public transport offers outside of London.

Active car club users were using private cars significantly less often than the average person in England. Only 21% of car club users (in London 18%, outside London 24%) said that they were using a private car at least once a week, either as a driver or passenger. This compares to 83% of the average English population in 2024.¹

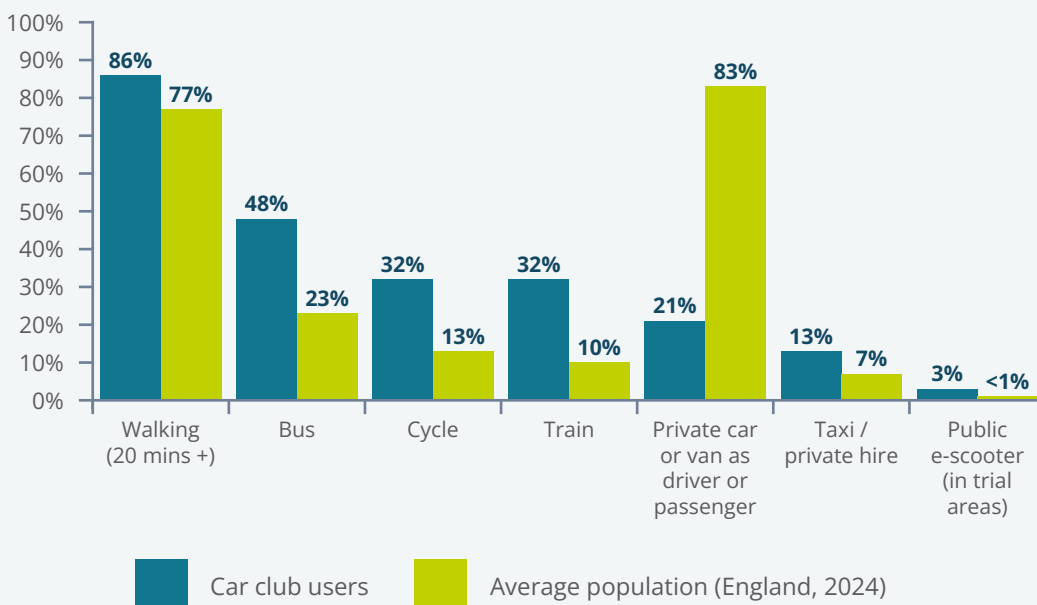
32% of active car club users were using a bicycle at least once a week. Outside London, 34% of car club users were cycling at least once a week, whilst in London 29% were doing so (England 2024 average: 13%).² In addition to cycling on their own bikes, 8% of car club users reported using bike share at least once a week. In London, this was true for 15% of car club users, outside of London for 4%.

86% of active car club users were walking for 20 minutes or more at least once a week. This share was almost the same in London (85%) as in the rest of the UK (86%; English 2024 average: 77%).³

32% of car club users were using a train at least once a week and 48% were using a bus at least once a week. Outside London, 23% of car club users reported at least weekly train use and 40% at least weekly bus use; in London 49% and 62% respectively. This compares to national rates in England of 10% for rail and 23% for buses in 2024.⁴ In addition, 19% of car club users reported using an underground or tram at least once a week, which included 37% of users in London and 9% of users outside London.

Other modes that car club users reported using at least once a week were taxi, at 13% (17% in London, 12% outside London) and 3% using shared e-scooter (4% in London, 3% outside London), compared with national figures of 7% for taxis and less than 1% for e-scooters.⁵

Percentage of individuals who use public transport and/or active travel at least once a week



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

2 NTS0313.

3 [DfT: National Travel Survey: Mode of travel, NTS0312.](#)

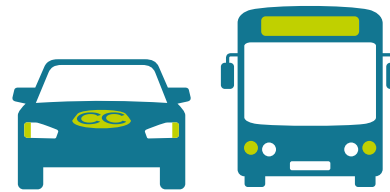
4 NTS0313.

5 NTS0313.



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48%

of active car club users were using a bus at least once a week (62% in London, 40% outside London), compared to a national average of 23% in England

"Being in a car club...encourages us to cycle or use public transport except when we really need a car, rather than falling into the habit of using the car just because it's there."

Non-binary user from Leeds, 35-44

"I mainly walk, cycle or use public transport. But there are plenty of occasions when I need to go places where public transport is not available. And it is very convenient to have easy access to a car."

Female user from York, 65-74

"I've saved a lot of time and money by not owning my own car and relying on access to a car club car when and if I need such. I have found that I only need infrequent access to a car. This is partly due to the availability of a range of good public transport where I live."

Male user from Nottingham, 65-74



Co Wheels

Co-location of car club vehicles

Car club users' more frequent use of sustainable transport modes can be supported by co-locating car club vehicles with public transport and active travel infrastructure. For the first time in the 2025 Car Club Survey, respondents were asked what other infrastructure was available at the site where they most commonly picked up a car club vehicle. Only 20% of users said that no other infrastructure was present alongside the car club vehicle, and in London this figure was at 15%.

"The car club enables me to have access to a vehicle after I've taken a train the 300 miles to visit family, which is great, as I can arrive refreshed and enjoy driving locally without the limitations of public transport in this area or relying on lifts."

Female user from Worthing, 55-64

Public transport is often found alongside car club vehicles, according to survey respondents. A bus stop was present for 68% of users, a rail station in 28% of cases. In London specifically, 37% of responses said that they most often collected a car club vehicle at or near an underground station.

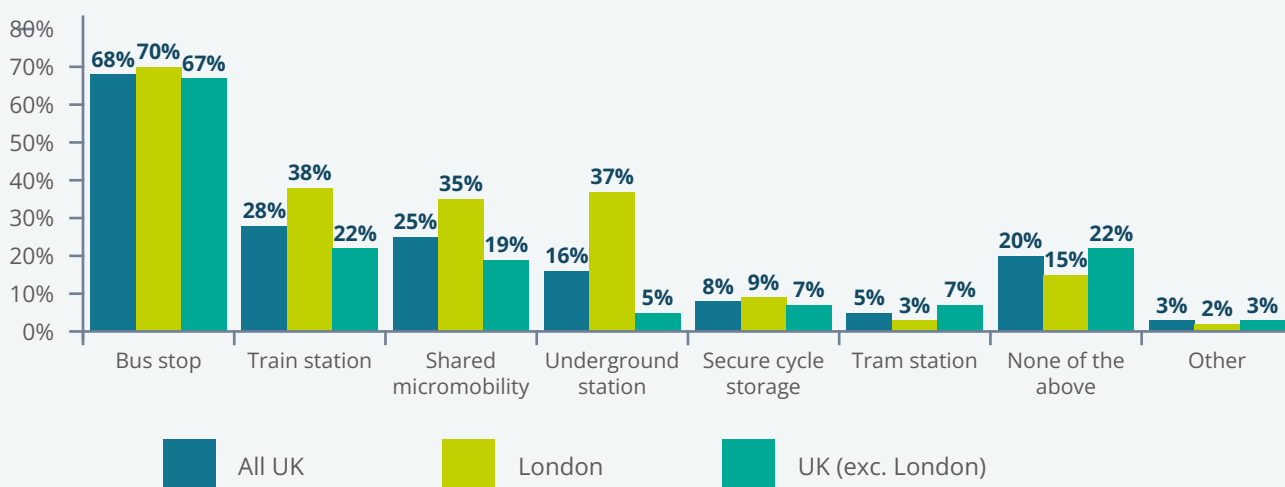
Of those 28% of users who picked up their car club vehicle at a train station, over 50%

of individuals caught the train at least once a week. This is significantly higher than the percentage of all active car club users who make train journeys with the same frequency (32%). There is a less pronounced effect for those users who state that a bus stop is present alongside the car club vehicle. 52% of those who pick up a car club car by a bus stop reported weekly (or more) bus travel, compared to 48% of all car club users.

Above, the report showed how active travel rates are higher among car club users than the average population, and again, co-location of vehicles can support this. 8% of survey respondents said there was secure cycle storage alongside the car club vehicle. Co-location with shared micromobility was more common, with car clubs located alongside shared bikes and/or e-scooters in 25% of cases (rising to 35% for London).

The benefits of co-locating public transport, shared transport and active travel infrastructure can be maximised at mobility hubs where these sustainable modes of transport are integrated to facilitate multi-modal journeys. In addition, mobility hubs do not only accommodate transport infrastructure but should also be used for public realm improvements. You will find [more information on mobility hubs on our website](#).

Transport infrastructure available at car club locations (respondents could choose more than one option)



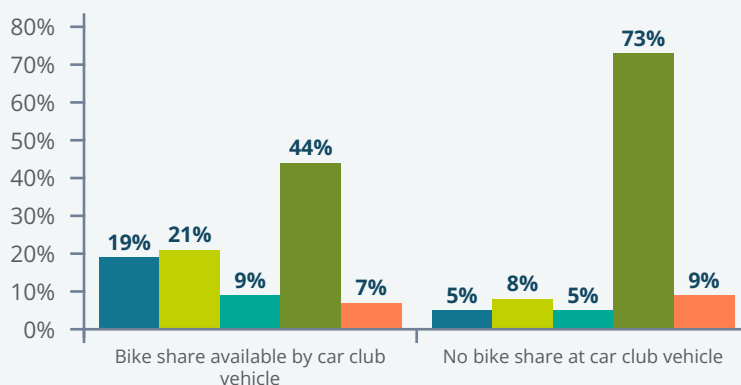
Synergies between car clubs and shared micromobility

Car club users whose most commonly used car club vehicle is located next to bike share or shared e-scooter parking use the shared bikes or e-scooters more often than other car club users. This shows that the co-location of different shared transport modes incentivises the use all shared modes that are available at a location. This provides strong evidence for the benefits of integrating shared transport modes with each other but also with other sustainable transport modes at mobility hubs.¹

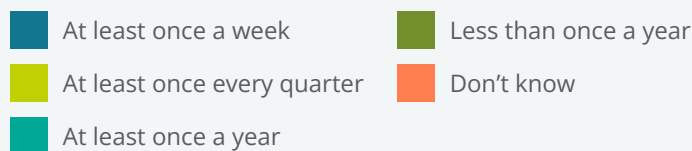
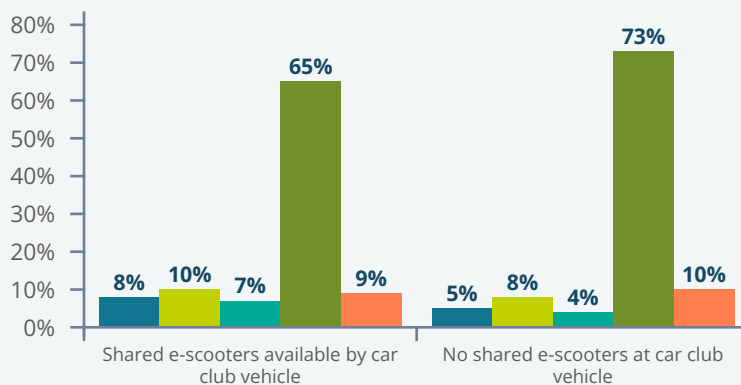
Among those car club users who typically used car club vehicles that were co-located with a bike share parking bay, 19% used bike share at least every week and 21% used bike share at least every quarter. In comparison, only 5% of those car club users who lived in an area with a bike share scheme but whose typically used car club car was not co-located with shared bikes used the shared bikes at least once a week; in the same group, only 8% used the shared bikes at least once every quarter.

For shared e-scooters, 8% of car club users use them at least once a week when their typically used car club vehicle can be found by a shared e-scooter, compared to 5% of car club users who live in an area with shared e-scooters but do not typically use a car club car that is parked next to shared e-scooter parking.²

Frequency of bike share use by car club users in areas with bike share schemes



Frequency of shared e-scooter use by car club users in areas with shared e-scooter trials



- 1 More information on mobility hubs can be found at [CoMoUK: Mobility Hubs - Overview and benefits](#).
- 2 To analyse the impact of co-locating car club vehicles and shared micromobility (shared bikes or e-scooters), we filtered survey respondents by the postcode that they provided (an optional question). We then assessed the shared micromobility use of those respondents who lived in an area with a bike share scheme (2,705) and of those respondents who lived in an area with a shared e-scooter scheme (1,779). In each of the areas, we compared the frequency of shared micromobility use between those car club users who said that a shared micromobility vehicle was available by their most commonly used car club vehicle with those who said that there was no shared micromobility vehicle nearby but who would still have access to shared micromobility in their local area.

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 115 hectares of public space or the equivalent of almost 300 miles of kerbside space.

Overall, 68% of car club users said that their household does not have access to a privately owned car (including company cars). 31% said they have access to one or more cars. This is almost the inverse of the national picture in England, where, in 2024, 78% of the population had access to one or more cars, and 22% had no access to cars.¹ Only 8% of car club users said they had access to two or more cars, compared to just over one third of the English population.

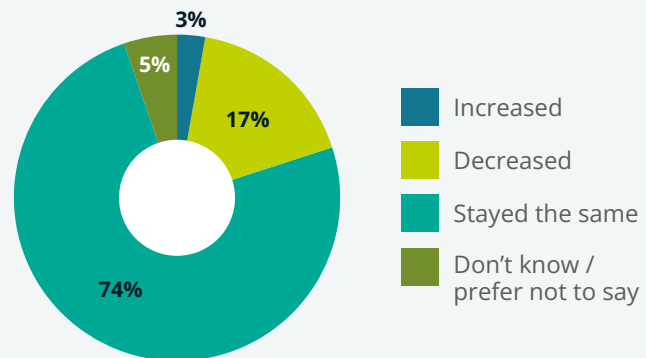
In the overall population, second car ownership has substantially grown in past decades: the proportion of households with one car or van has stayed more or less as it was in 1971, at around 44%. However, over the same time period, the proportion of households with two or more cars or vans has increased from 8% to 34%.² As shown here, car clubs have the potential to help reverse this trend.

When car club users were asked about changes in car ownership, 17% of active users stated that the number of cars in their household had decreased since joining the car club. This includes 2% of users who said that the number of cars in their household decreased by more than one car. 74% of users reported no change in the number of cars in their household. 3% of users 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.

"It allows me to not own a car. I don't want the expense and responsibility and use of space and pollution of car ownership."

Male user from Brighton, 55-64

Change in number of cars in household since joining car club



Among those car club users who had access to at least one car in their household, 18% stated that the number of cars in their household had also been reduced since joining a car club. This indicates car clubs' potential to lower the need for second or third cars.

28% of car club users said that they deferred the purchase of a car thanks to the car club. Among those were 26% who claimed that their household would have bought or leased one car if they had not become members of a car club, and 2% who said that they would have bought or leased more than one car. 20% said that they were not sure. 52% of users said that they would not have bought or leased a car in the absence of a car club.



28%

of active users had got rid of a car since joining the car club



17%

of active users said that they would have bought or leased one or more cars if they hadn't joined the car club

1 NB: this figure also includes vans, although this is estimated to be a small proportion of the number.

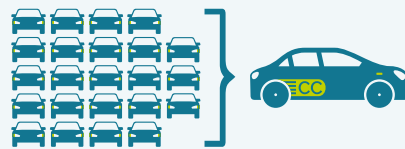
DfT: [National Travel Survey: Driving licence holding and vehicle availability NTS0205](#).

2 [National Centre for Social Research: Car Ownership: Evidence Review](#).

We estimate that, in 2025, each car club vehicle in the UK replaced around 23 private cars. We arrive at this number by averaging the net car loss of active, private users across our entire survey sample. The net car loss is the sum of all those cars that users said that they either sold or deferred purchasing since joining the car club, minus the number of cars that users said that they had bought since joining the car club.¹ This indicates that, on average, each active car club user in the UK disposed of 0.3 cars since joining the car club. Projected to all 297,462 individual active car club users in the UK, this equals a reduction of 99,999 vehicles, or a reduction of 23 cars per publicly available car club vehicle currently in operation.²

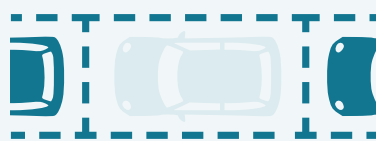
The number of private cars that a car club car replaces strongly depends on the context in which a car club operates. In London one car club car replaced around 28 private cars, whereas outside London, one car club car replaced around 16 private cars.

Overall, the private cars that were replaced due to car clubs in the UK occupied an area of over 115 hectares, based on a typical parking space size of around 2.4 by 4.8 metres.³ This means that an area equivalent to 160 football pitches that was previously required for car parking, or 300 miles (480 kilometres) of kerbside space, can now be used by the public for other purposes.



23 cars

On average, each car club vehicle in the UK replaced 23 private cars. One car club car in London replaced 28 private cars. Outside London, one car club car replaced 16 private cars on average.



300 miles

Car reduction by car clubs frees up 300 miles (480 kilometres) of kerbside space, further than the distance from London to Newcastle, which can now be used for other purposes.

"Moving to a city with car club cars within walking distance has meant that we have been able to go car-free as a household for the first time in over 25 years. We are finally free of the mental overhead of having to worry about a car and, while each rental does not feel cheap, our total spend has gone down and we are pleased to be contributing a little to reducing the number of cars in the UK."

Male user from Portsmouth, 45-54

"I am delighted to have taken one car off the road with a car-free household. The car club gives me the option of a car when I need it, and gave me the confidence to sell my car!"

Female user from Oxford, 55-64

- 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 (or that they did not know if the number of cars in their household had changed), we only accounted for the actually occurring change in car ownership. This means that for these users we did not factor in the deferred purchase of (a) car(s), in order to avoid double-counting the number of reduced cars.
- 2 When only accounting for the number of cars that were actually sold, excluding cars that users said that they deferred purchasing thanks to a car club, every car club car still replaces 11 private cars, or a total of 47,498 private cars across the UK.
- 3 The current UK norm for a parking space is 2.4 by 4.8 metres ([British Parking Association](#)).

Mileage reduction of car club users

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. The survey asked users of car clubs to estimate their monthly mileage with the car club, as well as their taxi and private car use (both as a driver and passenger). The results illustrate that members of car clubs lead low-car lifestyles.

53% of users drive fewer than 50 miles each month in a car club vehicle, with a further 23% driving between 50 and 100 miles. 13% said that they drive a car club vehicle for more than 100 miles in a typical month, 3% said that they wouldn't use the car club at all, and 7% reported that they didn't know.

Most car club users reported that they accumulated even fewer car miles by driving private cars. 37% of users don't drive a private vehicle at all each month, with a further 25% driving under 50 miles with this mode.



53%

of active car club users stated that, on average, they drive under 50 miles each month in a car club vehicle



45%

fewer car miles are driven by the average car club user per year, compared to the English average population

Based on this data, we estimate that, on average, each car club user in our sample accumulates 214 car miles per month, or 2,572 car miles per year, across all car-related modes of transport.¹ This is 2,112 car miles less per year than the average person in England, given that the average car mileage per person in England in 2024 amounted to 4,684 miles, including car miles as drivers, passengers and taxi trips.² In other words, we estimate that the average car mileage of a UK car club user is 45% less than that of the average English population.³

- 1 This is based on the question "How many miles per month do you typically travel with each of these modes of transport?". Respondents could choose a mileage range for each vehicle type. We calculated the mean average monthly mileage for car club users for each car related mode (private car as driver, private car as passenger, car club and taxi/private hire) using the midpoint of each range and assuming that "more than 500 miles" respondents had driven 550 miles. We further assumed that respondents who chose "don't know" did not use the respective mode in a typical month.
- 2 Combined figure for car driver, car passenger, taxi and minicab use. [DfT: National Travel Survey: NTS0303c](#).
- 3 Please note that this method of calculating the reduction in car miles by car club users differs from previous CoMoUK car club reports. For previous reports, we asked survey respondents to estimate by how much their monthly mileage changed since joining the car club. This approach had two disadvantages: Firstly, a large share of respondents (32%) responded "don't know". Secondly, the question referred to car club users' typical car mileage before joining the car club which is likely to have been already quite low. Through the new methodology, we compare car club users' car mileage against the benchmark of the average population as stated in the National Travel Survey, leading to more reliable results.

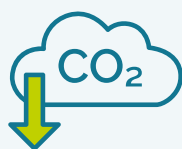
Avoided emissions of car club use

Using greenhouse gas conversion factors published by the Department for Energy Security and Net Zero in 2025,¹ it is possible to estimate the reduction in carbon emissions as a result of the estimated mileage reductions of car club users.² Based on average UK car use across taxi trips and car journeys as driver and passenger, we estimate annual emissions of 1,206 kg of CO₂e as a result of car use. For a car club member, this falls to 696.3 kg of CO₂e each year when comparing like-for-like travel types. The reduction of 510 kg of CO₂e each year represents a 42% reduction per person.

"We have not bought a private car, which greatly reduces our carbon footprint and environmental impact."

Female user from London, 25-34

National, regional and local governments have set net zero ambitions with various degrees of ambition. The analysis here, as well as the travel behaviours covered previously in this report, show that the promotion and expansion of car club services can make a significant contribution to these policy goals.



510kg

of CO₂e is avoided annually on average by each car club user as a result of the estimated mileage reduction



¹ [Department for Energy Security and Net Zero: Conversion factors 2025: condensed set.](#)

² This estimate uses a conversion factor of 0.258 kg of CO₂e/mile for the UK car fleet, based on the proportion of vehicles of different fuel types. A lower conversion factor of 0.189 kg of CO₂e/mile is used for the car club fleet given the higher prevalence of EVs. The "regular taxi" conversion factor of 0.208 kg of CO₂e/mile is used for the taxi/private hire category.

Inclusivity and accessibility

Supporting those with additional mobility needs

In addition to being a flexible and sustainable transport mode, car club use can support individuals whose mobility needs are not met by existing transport offerings in their area. Car clubs enable users to carry out trips that they would not have made otherwise, and this is particularly true for individuals with disabilities. Under the Equality Act 2010, a disabled person is someone with a physical or mental impairment that has a 'substantial' and 'long-term' negative effect on their ability to do normal daily activities.

Car club survey respondents were asked what mode of transport they would have used for their most common trip had a car club not been available. Across the sample as a whole, 17% of users reported that they would not have been able to make their most common journey. For car club users with a lasting condition¹ that significantly limits their day-to-day mobility, this figure rises to 29%.²

"I joined [a car club] 4 months ago and it has given me the ability to live my life again. I am disabled and pretty much struggled to go out. When I did go anywhere I was tired from the traveling so it was never an enjoyable experience just a time of worry and anxiety about getting back home. Now I can simply book a car right outside my property and go have fun with my family and friends."

Male user from London, 45-54

"Being a disabled driver whilst making my physical recovery back to good health, the car club has had a very large positive impact on my life."

Male user from Edinburgh, 55-64



POD Community Car Club

- 1 A 'lasting health' condition was defined as lasting, or expected to last for 12 months or more.
- 2 The sample of survey respondents with a lasting health condition that significantly limits their mobility is 124 people.

An affordable mobility option

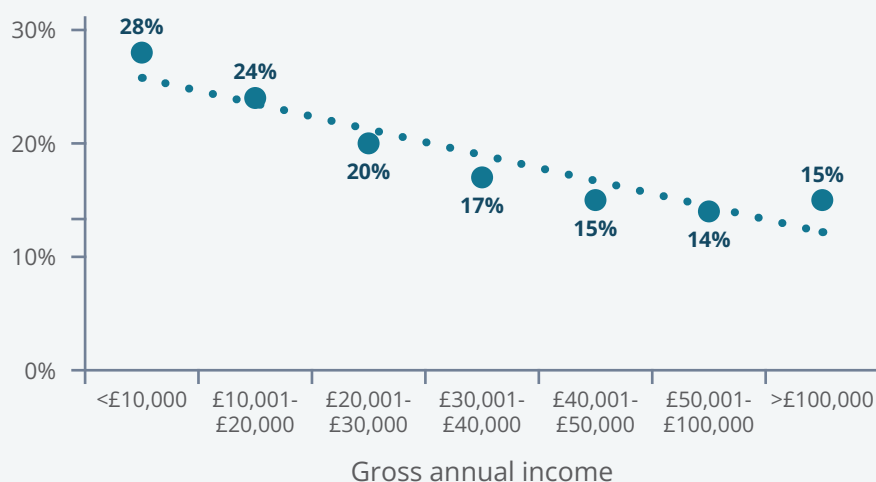
The [previous section on user demographics](#) showed that 25% of users reported gross annual incomes under £30,000. Further analysis shows that active users on lower incomes were more likely to state that they would not have been able to make their most common trip without a car club car, compared to those on higher incomes. The relationship between income and the enabling effects of car clubs are outlined in the graph below. 28% of users with incomes under £10,000 would not have been able to make their most common trip, compared to a maximum of 15% for all incomes above £40,000. The trend shows that there is an inverse relationship between the income of an individual and the degree to which access to a car club supports their mobility needs.

There is also a difference when comparing the mobility benefits of car club use across genders. The share of female users who would not have made their most common journey without a car club is 20%, compared to 16% for male users. The percentage rises to 27% for non-binary users.

"As a disabled person, [the car club] has absolutely changed my freedom, otherwise I would've been stuck at home more than would be both physically and mentally healthy for a human being."

Male user from London, 45-54

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



29%

of car club users with a disability would not have been able to travel by other means for the most common trip that they were using the car club for



28%

of car club users in the lowest income band (<£10,000) would not have been able to make the trip

Financial savings of car club use

This report has already shown that car club users use the service infrequently but use public transport and active travel more often than the average population. These usage patterns can result in financial savings when compared to the costs of owning and maintaining a private car. The 2025 CoMoUK Car Club Survey asked individuals to estimate their average monthly spend on their car club use, including membership and rental fees. For the sample of users who completed the survey, 33% of users spent under £20 on car clubs each month, with a further 29% estimating their monthly spend as between £20 and £50. Only 14% of users spent over £100 each month on their car club use.

"I don't want the admin nightmare or extra expenses of owning a car. Having car club literally on my doorstep has been great and saved me a small fortune."

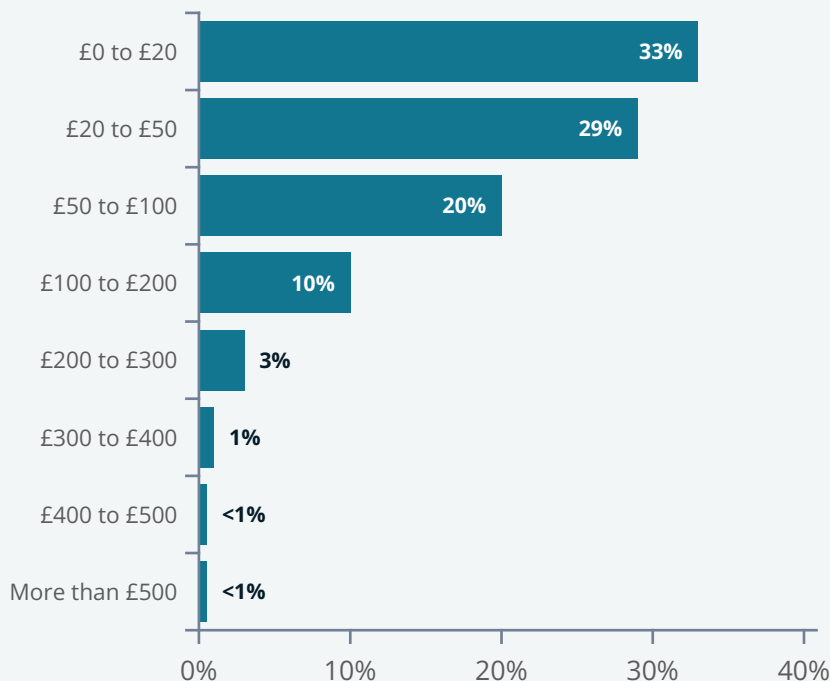
Male user from Brighton, 45-54

On the basis of this data, we estimate that the average monthly spend on car clubs per car club user was £56,¹ which would amount to annual costs of £675.27. Compared to the £3,484 that the average car owner spends on their vehicle each year (including depreciation, fuel, insurance, repairs, road tax and other expenditures),² car club use amounts to annual savings of around £2,800 that can be used on other, more sustainable travel options and other household expenditures.

"I joined the car club when I decided I would not replace my old diesel car. The car club has saved me money in car ownership because I think very carefully now about what I need to use a car for. I am therefore reducing the number of local car journeys and that's a good thing for the local environment."

Female user from Guildford, 45-54

Estimated monthly spend on car clubs



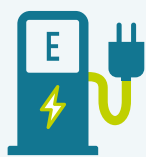
1 The monthly expenditure for car clubs is slightly higher for those users who say that they do not have access to a private car in their household, and amounts to just over £60 per month.

2 [NimbleFins: Average Cost to Run a Car UK 2026](#).

Electric and automated vehicles: future mobility options

Electric cars and low emission vehicles

Car club vehicles are significantly more likely to be electric than most of the UK's car fleet. By the end of September 2025, 28% of publicly accessible car club cars in the UK were electric, 31% were hybrid and the remaining 41% were petrol (whilst none were diesel). Among privately owned cars in the UK, just over 2% were battery electric by Q3 2025, 8% were hybrid and 90% were petrol or diesel.¹



28%

of publicly available car club cars were electric

Compared to 2024, the car club fleet has seen a 13% reduction in the proportion of petrol cars, a 15% increase in the proportion of hybrid vehicles and a 2% decrease in the proportion of EVs.

All car club cars are compliant with low emission zones. In September 2025, 50% of all car club vehicles in the UK were under two years old, whilst 100% were under five years.

When factoring in car club vans in addition to cars, 23% of the UK's entire car club fleet that was accessible to the public was fully battery-electric (excluding hybrid vehicles) in 2025. While this is still substantially higher than the 14% of electric vehicles (EVs) that were part of the UK car club fleet in 2022, 2025 has been the second consecutive year with a decreasing share of electric car club vehicles. In 2023, the share of EVs in the publicly accessible car club fleet was 29% and in 2024, the share of EVs was 25%. This suggests that car club operators continue to face challenges in providing EVs due to high purchasing, maintenance and insurance costs.²



49%

of active car club members had used a fully electric car club vehicle in the past 12 months

Among active car club users, almost half, 49%, had used a fully-electric car club vehicle. This is a decrease of three percentage points compared to 2024. There is regional variation to this, with 60% of car club users in Scotland having driven an EV and 56% of those in London doing the same. This compared to just 38% for users in England (excluding London).

Of those users who had not hired an electric vehicle, 49% stated that their main reason was that there were no EVs available in their area. The next most selected options were concerns about charging (16%) and not knowing how to use the vehicles (10%). This ranking of the three greatest barriers to using electric car club vehicles was the same across geographic areas. This data continues to demonstrate that, whilst technical issues are a concern for some car club users, availability of electric cars is, by a large margin, the most important obstacle to car club users using more electric cars.



49%

of users stated that availability of vehicles was the main reason for not using an EV

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

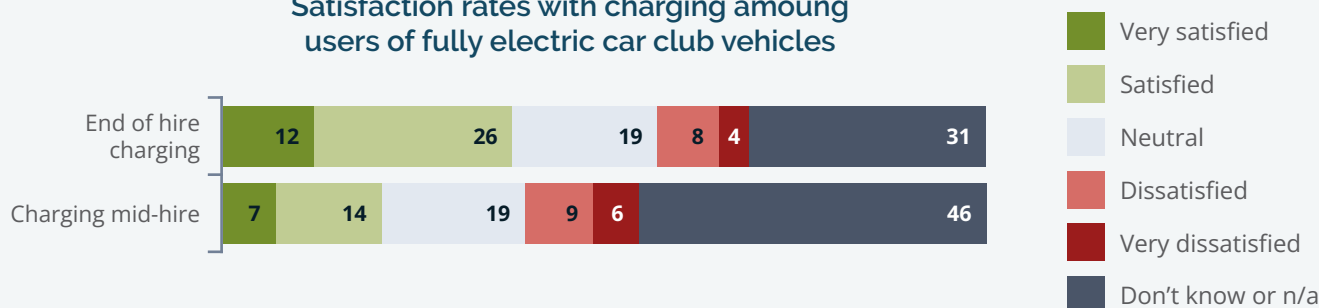
2 [CoMoUK: Extra cost of operating EVs in car clubs.](#)

In those areas where car club EVs are widely available, as in some London boroughs, car clubs can also help individuals who want to drive an EV to avoid the large overhead costs of purchasing one. 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.³

When assessing car club users' feedback on their experience with charging electric car club vehicles, a combined 38% of those users

who have used fully electric car club vehicles were satisfied with charging at the end of trip (12% very satisfied and 26% satisfied). This compared to just 21% satisfaction for mid-hire charging (7% very satisfied and 14% satisfied). More people were satisfied than dissatisfied with charging car club EVs both at the end or during a hire. However, the 31% and 46% "Don't Know or N/A" responses, respectively, indicate that a large proportion of car club users did not charge EVs at any point of their hire.

Satisfaction rates with charging among users of fully electric car club vehicles



Co Wheels

"Over the past year, its enabled me to try an electric car for the first time, visit family and carry out tip runs saving us a fortune in disposal costs."

Male user from Edinburgh, 35-44

"Car club has allowed me to drive my first EV. I have enjoyed testing their reactivity on the road and getting familiar with the network of charging points in the area and organising trips with recharging time in mind. It gives a better idea of how we could manage one if we ever were to buy a car."

Female user from Inverness, 35-44

"I really like the ability to try out one of the new electric cars available and getting used to this new technology."

Male user from St Albans, 45-54

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

Automated Vehicles (AVs)

In 2026, Connected and Automated Mobility (CAM) will become more visible on UK roads. Trials of automated transit have taken place in recent years, and this year will see the arrival of “robotaxis” to the streets of London on an initial trial basis.¹ When asked if they would consider using an automated (driverless) vehicle as part of a car club, 42% of all users said that they would, rising slightly to 44% of London-based users.

There are many uncertainties surrounding the introduction of automated vehicles (AVs) to the transport mix, including the impact on road safety, mode shift effects and physical changes to a new type of vehicle on the streets. For car club users and operators, there are also unknowns. While not an immediate concern, AVs within a car club fleet could positively affect the management of vehicles given that AVs can be remotely controlled and redistributed around areas.



¹ [Transport for London: Connected and Automated Vehicles.](#)

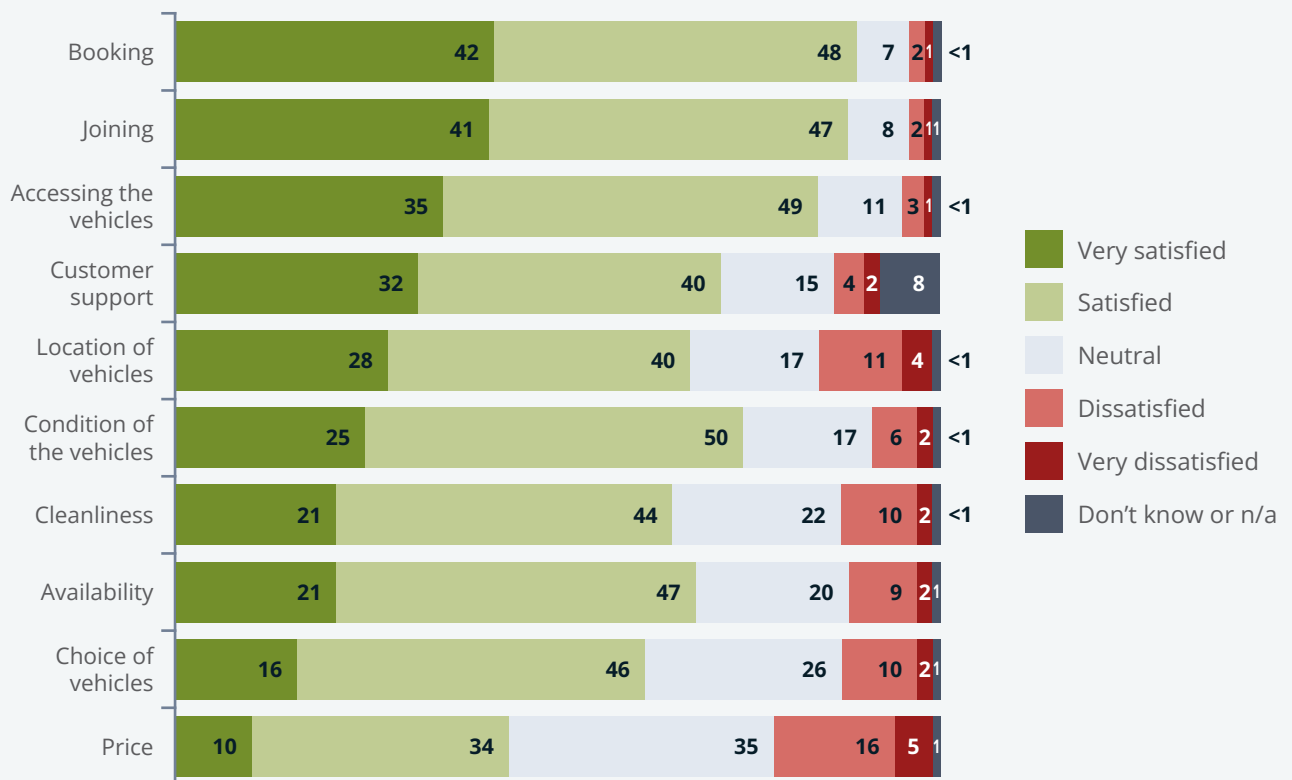
Customer satisfaction

Active users were asked about their levels of satisfaction with a range of aspects of the service. The majority of active users were very satisfied or satisfied with most aspects of the services, from making a booking (42% very satisfied, 48% satisfied), to the joining process (41% very satisfied, 47% satisfied), and accessing vehicles (35% very satisfied, 49% satisfied). Fewer people were happy with the availability of vehicles (21% very satisfied, 47% satisfied) and the choice of vehicles (16% very satisfied, 46% satisfied). The only aspect with which the majority was not satisfied or very satisfied was price. For this criteria, 21% stated that they were dissatisfied or very dissatisfied.



Enterprise Car Club

Customer satisfaction (values in %)

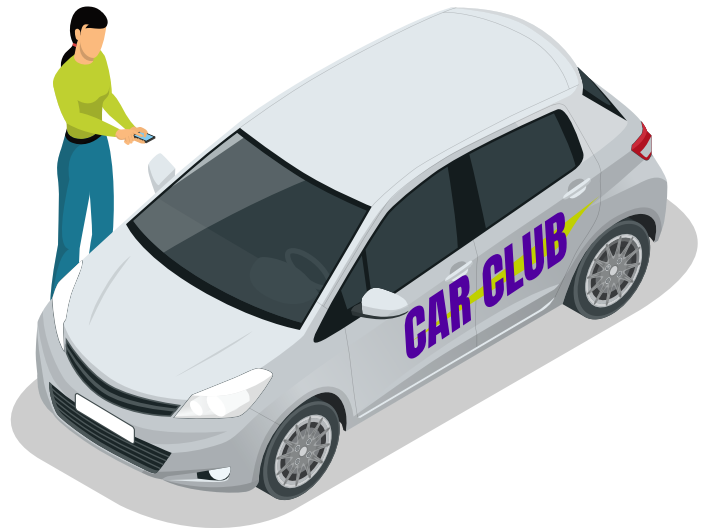


Contacts and further information

The UK CoMoUK Car Club Annual Report 2025 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 Youxin Lin from the School of Civil Engineering at the University of Leeds.

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.



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.

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