Shared Mobility

Ipsos MORI report for the Department for Transport

November 2019

Contents

1 Executive Summary

The Department for Transport (DfT) commissioned Ipsos MORI to explore motivations and barriers for using shared mobility, the factors driving demand for shared mobility, and the potential impacts on traditional modes of transport.

A series of focus groups and in-depth interviews were conducted with people who use some kind of shared mobility. The shared mobility types that we focused on were car clubs (e.g. Zipcar), web-based ride-sharing (e.g. Liftshare), ride-pooling (e.g. UberPool), car-pooling, and demand responsive transport (e.g. dial-a-ride).

The key findings are summarised here, grouped by research question:

What factors influence people's acceptance of/decision to use shared mobility services (including financial and other factors)?

- There were **four key priorities** that affected participants' transport decisions: Convenience, cost, comfort and safety, with convenience and cost often the first things that participants thought about when choosing a method of transport:

  - **Convenience**: the less forward planning, the better! People value a seamless journey from A to B. Participants spoke about journey speed and whether they were able to take a direct route without changing transport.

  - **Cost**: this was an important component of the decision-making process. Participants said that there would always be some appeal in a lower-cost transport options but not at any price.

  - **Comfort** was important to participants, but they were likely to compromise on it in favour of cost or convenience. Shared mobility options tended to be more comfortable than public transport but less so than a private vehicle.

  - **Safety** was very important to participants, and while it wasn't something they thought about often with traditional modes of transport, they expressed strong concern about the safety of sharing vehicles with strangers.

- There were also **societal benefits** that participants considered important, such as reducing road congestion and reducing carbon emissions. However, these were not as important as the four priorities when making transport decisions.

- Participants made **different trade-offs and compromises** on the priorities **depending on factors** such as: the time of travel, the reasons for travel, who or what they had with them (e.g. children, furniture or bulky items), the weather, availability of parking, plans to drink, and requirements for a return trip.

- Participants often **decided to use shared mobility when there was a barrier or limitation with their previous mode of transport** such as: frequently cancelled trains, limited parking at work, a broken down or unavailable private vehicle, or limited public transport services for their area or schedule.

- **Car-clubs**: Users said they were best for flexibility, privacy, and having room in the car for extra things. Flexible services appeal to users who want one-way trips and plenty of designated parking options in urban areas. Non-users had an impression that car clubs were expensive and complicated, but users say this is not the case.

- **Ride-sharing**: This was the most contentious with regard to safety, with non-users expressing strong reservations due to the potential direct threat of harm by a stranger and to a lesser extent, danger caused by unsafe vehicles or driving style. However, it was favoured by users as an alternative for longer distances to trains and costly solo driving. Participants who commute via ride-sharing said they often ended up with the same person, reducing their concern about safety.

- **Ride-pooling**: This was synonymous with UberPool and considered safer than ride-sharing due to the presence of a professional taxi driver. Participants used this when in an unfamiliar city, and when travelling to and from social or leisure plans at night. Users compared this to getting a private taxi, but more affordable.

- **Car-pooling**: Participants who car-pool often used it to get to and from work or took turns with other parents to drive each other's children to and from school and extracurricular activities. This was popular for its comfort, convenience and cost. Downsides included reliance on other people's schedules, potential social obligation to continue against their preferences, and the requirement to know about a suitable sharer.

- **Demand Responsive Transport (DRT)**: Participants who used dial-a-ride services also had to consider accessibility and reliability for attending hospital appointments. They said dial-a-ride was much more reliable, comfortable and accessible than public transport and much friendlier and affordable than private taxis.

What barriers or potential barriers might supress take-up?

- **Safety concerns:** This was the biggest and most challenging barrier for participants. Those who felt that sharing a vehicle with a stranger was too dangerous said that they would be unlikely to change their mind on this.

- **Desire to travel alone:** an aversion to sharing a vehicle with someone else was often due to a fear of having awkward conversations, a concern about being reliant on the other sharers' timekeeping, or the participant valuing private time to unwind or prepare on their way to or from work/their destination.

- **Lack of availability**: This was particularly the case in rural areas where a limited user base often resulted in limited service availability for all types of shared mobility. This could mean little flexibility in time of travel, or no available car club vehicles present in the local area.

- **Awareness:** This was a particular barrier for DRT/dial-a-ride services and ride-sharing apps such as Liftshare and Blablacar where participants discussed a low awareness of the options available. For some options, particularly car clubs, non-users had some awareness that the option existed, but such limited awareness of how it worked that **confusion and uncertainty** became a key barrier that would put them off trying it out.

What incentives or potential incentives may encourage people to use shared mobility services?

- **Central designated parking:** Participants said that they often chose to use a car club rather than drive their private car if there was designated car club parking available at the destination, especially if the destination was in a built-up area with limited parking.

- **Parking schemes run by employers:** Car-poolers and ride-sharers often said that cheaper or better parking for shared vehicles at work encouraged them to share.

- **Safety reassurances:** More information about and regulation of passenger safety for ride-sharing services such as Liftshare.

- **Financial incentives:** Participants suggested different ways in which sharing could be financially incentivised, such as opt-in schemes where proven sharing led to a road-tax rebate.

How may use of shared mobility fit in with use and perceptions of traditional public transport and private car ownership?

- Participants who could drive described how their use of shared mobility **did not impact their car ownership** but **did reduce their use of their car to some extent**, or they explained that they had chosen to use shared mobility **instead of buying a second car**.

- Participants who did not drive used shared mobility to **supplement public transport services** as well as **often choosing shared mobility over public transport** due to greater convenience and comfort.

2. Background and methodology

2 Background and methodology

2.1   Research purpose and approach

England continues to be a car-oriented society. Near three-quarters of households own a car and view car ownership as necessary; in a recent survey for the Department for Transport (DfT) 88% of car owners said that their current lifestyle meant that they needed to own a car or van[1]. However, changing societal and technological trends are shifting people's attitudes and travel behaviour, and in recent years there has been a rapid increase in car and ride sharing.

While DfT has good evidence on the barriers to sharing amongst the general population, there is a lack of evidence on **why current users choose to share** transport and how they make **decisions for different trips**. Understanding what drives demand for current shared services will help DfT understand proven and potential demand for shared mobility, the potential impacts on traditional modes, and to scope policy options to manage demand and encourage uptake.

On behalf of DfT, Ipsos MORI ran six discussion (focus) groups and 17 telephone in-depth interviews throughout September-October 2019. The purpose was to explore motivations and barriers for using shared mobility, the factors driving demand for shared mobility, and the potential impacts on traditional modes of transport.

Groups: The groups were held across four locations (London, Norwich, Sheffield and Manchester) to ensure a spread of different types of urban setting and to focus recruitment on places where sharing was likely to be more prevalent.

Each group involved around eight participants who used at least one type of shared transport. Groups lasted for 90 minutes and focused on comparing shared mobility options to traditional transport options as well as exploring perceptions and experiences of shared mobility. Focus group materials can be found in Appendix 10.1.

In-depth interviews: 12 in-depth interviews (depths) were recruited to cover a mix of shared mobility types, and five depths were conducted with users of Demand Responsive Transport (DRT). Depths focused on probing for detail about participants' decision-making, priorities and motivations for choosing shared mobility. Each interview lasted up to 45 minutes. Depths with DRT users are reported separately at the end of this report given the unique challenges and priorities of these users. Discussion guides can be found as Appendix 10.2.

---

[1] October 2018, Transport and Technology Public Attitudes Tracker December 2017, Department for Transport
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/752240/transport-and-transport-technology-public-attitudes-tracker-wave-1-and-2-report.pdf

2.2   Research questions

The research was designed to address four key questions as follows:

- What factors influence people's acceptance of/**decision to use** shared mobility services (including financial and other factors)?

- What **incentives** or potential incentives may encourage people to use shared mobility services?

- What barriers or potential **barriers** might suppress take-up?

- How may use of shared mobility fit in with use of, and perceptions of **traditional public transport** and **private car ownership**?

2.3   Shared mobility definitions

'Shared mobility' refers to transport methods where the journey or the vehicle is shared with other people, and the transport is arranged according to those users' plans. The types of shared mobility that this research focused on were defined in line with the Future of Mobility Urban Strategy published by the Department for Transport in March 2019[2].

- **Car clubs**: access to cars for short-term rental, including round-trips and 'flexible' one-way trips. Vehicles may be owned by individuals and lent out on a peer-to-peer basis via an intermediary platform, or form part of a fleet owned by a single organisation. Examples include peer-to-peer schemes such as Drivy, Co-Wheels Car Club, or Turo, and example of single organisation fleets are ZipCar, Enterprise Car Club, or Norwich Car Club.

- **Ride-sharing:** also known as lift-sharing; people use an app or website to find others who plan to travel a similar journey route and arrange to share that journey, with one of these service users driving. Examples include BlaBlaCar, Liftshare, GoCarShare.

- **Ride-pooling**: people use an app or website to book a taxi ride that they share with another service user with a similar journey route. There is a therefore a taxi driver present, and neither service user drives the vehicle. The only example known by participants is UberPool.

- **Car-pooling:** ride sharing that is often informal and always arranged offline (rather than via an app or web service), directly between individuals who know or meet each other and share a similar journey route.

- **Demand Responsive Transport (DRT)**: Shared transport such as dial-a-ride or community buses, requested for specific locations and times, often for those with limited mobility. While dial-a-ride

---

[2] March 2019, Future of Mobility: Urban Strategy, Department for Transport.
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/846593/future-of-mobility-strategy.pdf

was the focus of DRT recruitment and discussions during this research, other new and innovative examples include ViaVan and ArrivaClick.

2.4 Sampling

We designed a sampling approach to reach users of the five different types of shared mobility (described above) as well as different **frequencies** of use, so that we could explore the way that shared mobility fits into a range of typical transport habits.

We expected a low incidence of potential participants and some difficultly categorising transport habits at recruitment, so we provided clear definitions of the different types of shared mobility to recruiters, in order that they could better discuss and categorise participants' transport habits. Recruitment also benefited from information provided by Liftshare to DfT about locations where there was likely to be higher incidence, which allowed us to choose group locations accordingly.

DfT worked with us to adapt recruitment allowing us to make an important change to group locations; recruitment in Manchester and Sheffield became difficult so we replaced one of the two groups in each location with a group in London. The two London groups involved a specific focus on people who use public transport very regularly, so that discussions could delve deeper into how shared mobility fits with public transport.

Quotas were used to recruit a mix of users with different age, gender and social grades across all depths and in each discussion (focus) group so that a range of perspectives were represented. The recruitment screeners used for groups and depths are provided in Appendix 10.3.

Method	Participants	Characteristics covered
Depths – shared mobility users	12	- Car clubs, car pool and ride sharing - Daily, weekly, monthly and occasional users - Mix of vehicle ownership / access to a private vehicle - A range of age, gender and social grade
Depths – DRT users	5	- Dial-a-ride users - All with limited mobility due to health - Weekly, monthly and occasional users - Mix of vehicle ownership / access to a private vehicle
Groups – Norwich, Manchester, Sheffield	c8 per group (Four groups)	- Car clubs, car pool and ride sharing - Daily, weekly, monthly and occasional users - Mix of vehicle ownership / access to a private vehicle - A range of age, gender and social grade

Groups – London	c8 per group	▪ Car clubs, car pool and ride sharing
		▪ Daily and weekly users only
	(Two groups)	▪ A range of age, gender and social grade

2.5   Interpretation of findings

Throughout the report we have referred to 'participants' and provided verbatim comments where these illustrate findings. Quotations have been attributed according to gender, location, whether the comment was given at a group discussion or via a depth interview, and according to the type and frequency of shared mobility used.

It is important to bear in mind what **qualitative** research provides:

- It explores the **range of attitudes and opinions** of participants in detail.

- It provides an insight into the key **reasons underlying** participants' views.

- Findings are **descriptive** and **illustrative**, not statistically representative.

- Often, individual participants hold somewhat **contradictory views**.

- Participants are provided with detailed information and can become **more informed** than the general public.

Participant stories are based on genuine stories from participants involved in the research, but these are not direct quotes, and include some additional context drawn from what we know about them. Names have been changed to retain anonymity.

3. When and why participants share

3 When and why participants share

Chapter summary

- **Four key priorities** underpinned participants' transport decisions: **convenience, cost, comfort** and **safety**.
- They also valued **societal benefits** such as lower carbon emissions but weren't likely to compromise on any of the four priorities in favour of a societal benefit.
- Participants made **different trade-offs between priorities** depending on the nature of the journeys being made. **Convenience and cost were normally the highest** priority but not for all journeys.
- Participants **started using shared mobility** options for two key reasons:
  - shared mobility options **overcame a specific limitation** off traditional modes; or,
  - shared mobility options provide a compromise **across more priorities**.
- **Key incentives** that motivated use of shared mobility included better or **cheaper parking**, employer **incentive schemes**, and **avoiding the need to purchase a second household car**.
- The **social dynamics of sharing** with a stranger divided opinion; those who felt it would be uncomfortable were put-off, and those who enjoy meeting new people considered it an additional benefit on top of cost and convenience.

3.1   Priorities: What matters?

Participants were clear about their reasoning for using different modes of transport for different types of journeys, and their decision-making process for each journey centred around four priorities:

1. **Convenience**: Journey ease was important; the less forward planning, the better! Participants valued a seamless journey from A to B. They spoke about journey speed and whether it was a direct route, or if they had to get a bus to the train station or change train or bus halfway. Driving was considered the most convenient option, but a taxi was more convenient than public transport.

2. **Cost**: This was an important component of the decision-making process. Participants said that there would always be some appeal in a lower-cost transport options, but not at any price. Sometimes participants were happy to pay a little more if it meant that other journey requirements such as convenience would be better fulfilled.

3. **Comfort:** Here, participants were considering physical and social comfort. They valued travelling in a clean, spacious environment, enjoying a hassle-free journey and the privacy that comes with travelling solo or with people that you know well (e.g. family and friends).

4. **Safety:** This was considered 'a given' for some transport modes (e.g. driving your own car), and therefore it was not always at the forefront of participants' minds when discussing priorities in a general way ('what matters to you?'). However, when specific examples brought safety into question (e.g. when travelling alone at night, in less well-known areas or alone with strangers), it became a key priority, particularly for women, and even a deal-breaker if not satisfactorily assured.

▪ While not as top-of-mind as the four above, participants also considered it a **societal benefit** if a mode of transport was also good for their community by reducing road traffic/congestion, or good for the environment by reducing carbon emissions.

3.2   Trade-offs and journey contexts

The relative importance of convenience, cost, comfort and safety varied significantly depending on the nature of the journeys being made. Participants talked us through these trade-offs in decision-making shown via a Venn diagram in the graphic below:
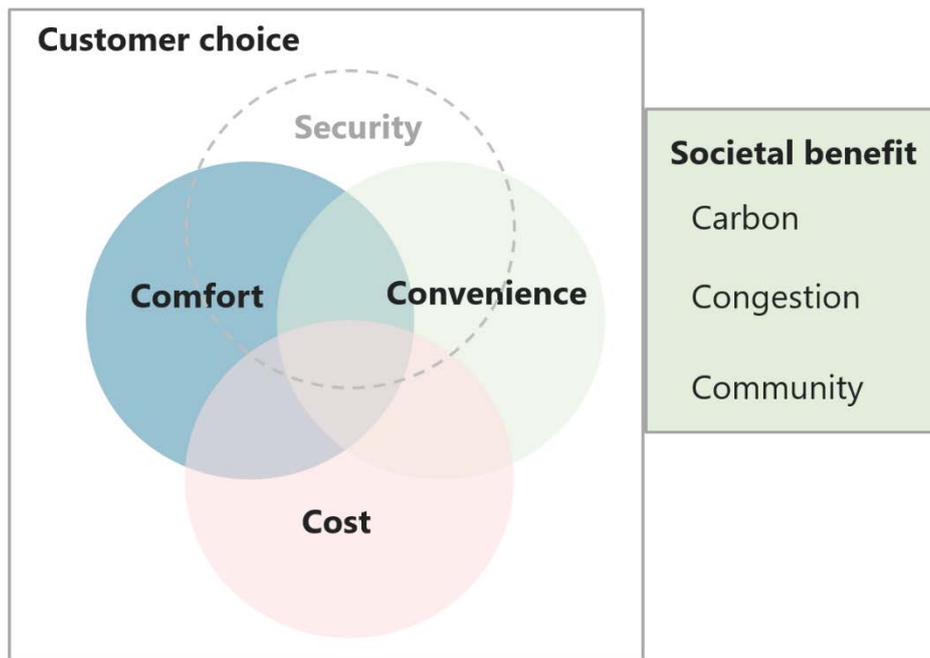
Figure 1 Venn diagram of priorities

As part of this trade-off process, participants explained that they would usually have to choose one or two priorities that were most important for that journey and compromise on the others, placing their choice outside the centre of the Venn diagram (Figure 1). For example, the bus may be the best means of getting around due to cost and convenience, but these priorities are downgraded in favour for comfort when it is late at night or raining. In these cases, a taxi may be considered worth the additional expense. When thinking about getting public transport, comfort and convenience often had to be sacrificed for a cheaper journey.

> **"[Taxis are] sometimes it's a bit tricky when it's overbooked, but [trams are] a lot cheaper than getting a taxi."**
>
> (Male, Group, Manchester, weekly car-club user)

Societal benefit factors sit outside the Venn diagram (Figure 1) during trade-offs, as even though participants valued transport that is better for the community, for congestion or for the environment, they said they were unlikely to compromise on any of the core priorities in favour of a societal benefit.

Participants' travel decisions were shaped by where they live; those living in more **rural locations** had a completely different experience of transport compared to those living in a commuter **town or a city**. In rural areas, cars are used more frequently and for longer trips. In the most rural areas, it is estimated that an average of 797 car trips are made per person each year, which is much higher than average across England (598 trips)[3].

Local limitations in public transport services evidently made participants more reliant on taxis or their own car. In London, comfort is highly valued but less of an active factor in transport choices; the Tube's relative discomfort and high efficiency mean it is sometimes described as "a necessary evil" by urban commuters.

Overall, cost and convenience were given more weight in decision-making, and being top-of-mind they were discussed most readily. It was when asked to consider the advantages and disadvantages of different modes of transport in more depth, that participants moved on to thinking about journey comfort and safety.

The car is used for 61% of trips and represented 78% of all vehicle mileage travelled in England in 2018[4]. In our research travelling by car was considered the preferable way to get around as it met all priorities to some extent. It was thought to be most comfortable and largely convenient if parking is not an issue, as well as being safe. Although not always as cheap as other modes of transport, the cost is not considered unduly high to outweigh advantages.

> **"I don't have a parking space at work. So, it's either me pay extortionate amounts to park in the city, or bus or walk. It's a 20-minute walk. If I had the choice and the parking space at work, I'd probably drive because it's quicker and easier, but I don't see the point in paying minimum £5 to park in the city."**
>
> (Male, Group, Norwich, weekly ride-sharing user)

---

[3] National Travel Survey Mode Travel: England 2017, *Department for Transport,*
https://www.gov.uk/government/statistical-data-sets/nts03-modal-comparisons

[4] National Travel Survey: England 2017, *Department for Transport,*
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/729521/national-travel-survey-2017.pdf

3.3   Traditional options, strengths and limitations

Transport was an integral part of participants' daily routine and they depend on private cars and/or public transport to go to work, socialise, pick children up from school and take them to activities, and run errands. Participants felt there is no perfect mode of transport (at the centre of the Venn diagram, Figure 1), and the traditional modes come with their own merits, but also apparent limitations.

Participants spoke about the range of transport modes they used to travel around their local area and further afield. When considering **traditional modes** (i.e. private car, buses, trains or taxis), they were most familiar with using the car and buses to get around. Trains were usually used for specific planned journeys, such as going to visit family and travelling further distances for holidays or business trips, except for London where it was felt that services are better designed for short daily journeys.

Other than public transport, taxi usage was often discussed as an expensive option if nothing else was possible, or participants wanted to "treat" themselves. Taxis were relied on in rural areas where public transport links were poor, when travelling later at night, with elderly family members or children, or when having a car would be a nuisance, for example when going out for drinks or when parking is limited.

Public transport	Private taxi	Private/own car
▪ Availability and reliability are poor in some less central areas. ▪ Participants said some buses and trains they have taken were unclean, overcrowded and often not cheap. ▪ DRT users said indirect routes and unreliable services are a particular issue for hospital appointments. ▪ London Underground is often described as the pragmatic option in London as there are many stations, and it is cheap and fast.	▪ Described by participants as comfortable, reliable, and with a door-to-door route. ▪ However, this comes at a much higher price which isn't always justifiable for participants. ▪ Taxis are heavily relied on in areas with poor public transport services. ▪ Participants had a low level of safety concern about taxi's but described some bad experiences and concern about unregistered cabs.	▪ Considered the most comfortable and convenient by allowing the most control over the journey and when to travel. Also described as the best for travelling with children due to the vehicle space, privacy and control over journey. ▪ Drawbacks shared by participants were parking, traffic and cost; all of which were worse when driving in London. ▪ DRT users need to park close to their destination and need space to exit the vehicle. Lack of hospital parking is not practical for driving to appointments.

3.4   How shared mobility addresses these limitations

Participants reported having begun to consider and eventually try-out shared mobility options for two key reasons: shared mobility options **overcame a specific limitation** they were experiencing with traditional modes; or, shared mobility options **fulfilled more priorities by compromising** partially on the extent to which some are met, essentially closer to, or in the middle of the Venn diagram (Figure 1).

> **"With [traditional] transport there's a balance of cheap vs comfortable options; public transport is low comfort and low cost; cars and taxis are high cost and comfort. These shared options are kind of in the middle for both."**

(Female, Group, London, weekly car-club user)

Examples given by participants of shared mobility options being better balanced in the trade-off of priorities include:

- **Using car-clubs when travelling with heavy items or young children (instead of public transport or private taxis):** car clubs were considered more convenient than public transport due to a more direct route, more comfortable than public transport by providing private space and seats, and whilst it compromised slightly on cost compared to public transport, it is still cheaper than a private taxi.

- **Ride-pooling in an unfamiliar city (instead of driving or using public transport**): using UberPool was more convenient than driving and public transport as no need to navigate around or park in an unfamiliar city, more comfortable than public transport, and cheaper than private taxis.

- **Ride-pooling when travelling to and from social or leisure plans** such as restaurants, pubs or event venues: better than driving as freedom to drink, better than private taxis on cost, better than public transport on comfort.

Participants who had first started using shared modes of transport in order to overcame barriers or frictions in their previous journey-making spoke about **a specific experience that was 'the last straw', pushing them to experiment with other options**. Such experiences included a cancelled train, lack of parking for non-shared vehicles, bus services being unavailable at the time of day or night that they need to travel, a broken-down private car, or the shared household car being in use by their partner.

Examples that participants gave of how shared mobility overcame a specific issue with their traditional options include:

- **Ride-sharing and car-pooling when commuting to work outside of public transport service hours:** Those who work very late or early shifts found that public transport isn't always available for the journeys they need to make. However, they found that people who work similar hours are looking to share either via a ride-sharing service such as Liftshare, or by seeking out colleagues to car-pool with.

- **Ride-sharing and car-pooling rather than driving when private car is unavailable:** Those who shared a private vehicle with others in their household had found it often wasn't available when they had to travel e.g. if their partner drove it to work three days a week. They found car-pooling and ride-sharing to be good options to overcome this, sometimes taking other passengers on days that they did have the car.

3.5   Additional benefits and incentives that encourage take-up of shared mobility

▪ **Better / cheaper parking:** Participants spoke about designated or discounted parking spaces in cities, town centres and at work, explaining that this incentivised sharing over driving a private car alone to such locations. For example, car clubs offer similar benefits as driving your own car but without having to worry about finding somewhere to park on arrival in locations that have designated car club parking. Participants whose employers had introduced car-pooling schemes said this had been very encouraging; they explained how they scan both the driver and passenger's employee ID's when entering the work carpark, and can then park in the best parking spaces or are not charged to park.

> **"The good thing with carpooling at my work is that if there's two of you, you can park closer to the entrance."**
>
> (Male, Group, Manchester, monthly ride-sharing user)

▪ Participants felt that the Government and employers should do more to encourage people to consider car-pooling with colleagues rather than driving to work separately. Participants told us about schemes their employers had introduced such as systems to scan employee ID's when entering the car park that helped to identify and reward car-pool sharers, or an internal closed ride-sharing network to help them find colleagues with similar journeys. They suggested that the Government contribute to incentive schemes run by employers to encourage the uptake of car-pooling and ride-sharing between colleagues.

> **"I started using it because it was promoted at work to get people to sign up. They offered perks like best car parking, reserved spaces, no extra charge. You would have a sticker, so people knew you were sharing."**
>
> (Female, Depth, monthly ride-sharing user)

▪ **Reducing journeys required:** Parents told us they found other parents living nearby were also taking their children to the same school and after school activities at the same time. They arranged to take-turns driving each other's children, thereby reducing not only the costs of driving a separate vehicle but also reducing the journeys they had to make individually.

> **"I do it a lot with my friends because of children. We regularly share the football training, which is about 20 minutes away. Kids' parties, they can be all over. We help each other out to save journeys and money and time. It works really well."**
>
> (Female, Group, Norwich, daily car-pool user)

▪ **Avoiding purchasing a second vehicle**: Participants who share a vehicle with a partner or other household member(s) said that using shared mobility helps them to avoid buying a second vehicle. They said that they do not make enough car journeys to warrant the cost and burden of two vehicles but felt that they cannot supplement the shared vehicle with public transport alone.

> **"I do miss my car. I belong to a car club so if I want to go out for the day I just go and get it, and literally it's at the top of my road. If my partner's not using it, I'll just use his car. To have two cars in a family is expensive. We were paying £500 a month just on a car. Now it's just his car, we're so much better off."**

(Female, Group, Norwich, monthly car club user)

3.6   Social considerations of sharing

There is an additional social element with shared modes of transport. Different participants held positive and negative views on sharing with strangers, sometimes based on experience, other times on perception. One shared perspective was that the situation could be too awkward or 'hard work'.

> **"Sometimes I'm anti-social in the mornings. If you've had a late night you don't want to get in a car with someone who's skipping to work."**

(Female, Group, Sheffield, weekly car-club user)

Conversely, there was a view that sharing with strangers is not a major issue and can sometimes even be enjoyable. This view was expressed by participants who had used ride-sharing when travelling between cities for leisure and finding that their companion was of a similar mind-set to them.

Participants who had shared rides with strangers spoke about initially having reservations about the notion of sharing a journey with strangers, however, once trying it out, they felt more comfortable than expected and got used to sharing after a few trips. Participants who had booked an UberPool by mistake when attempting to book a private Uber shared different reactions to their experience; they either described being surprised when the vehicle picked up other passengers, but ultimately becoming comfortable and being open to trying it again. Compared to ordering a private Uber (which was the most typical alternative), sharing the journey makes getting a taxi affordable enough to compromise a little on privacy and journey time. Alternatively, we heard of negative experiences with loud passengers and longer routes, exacerbated by the surprise of having accidently booked a pooled taxi, leading to the conclusion that they would never book an UberPool again.

Car-pooling raised different social issues, as although the arrangements were often informal and passengers tended to know each other, there could be social obligations that cause stress. Non-users said that they would be put-off by feeling obliged to continue the arrangement even if it didn't work for them, because they knew the other person and wouldn't want to be rude. Users' experiences varied; in some cases, sharers felt a sense of social obligation causing them stress, while in others, sharers communicated and adapted well with each other and were happy with the level of flexibility in the arrangement. Car-poolers spoke about building and strengthening relationships by traveling together, whether in a friendship or a professional network.

4. Car clubs

4 Car clubs

Definition

Access to cars for short-term rental, including round-trips and 'flexible' one-way trips. Vehicles may be owned by individuals and lent out on a peer-to-peer basis via an intermediary platform, or form part of a fleet owned by a single organisation.

Chapter summary

- There is high awareness of the concept due to visible vehicles and parking spaces, but low awareness and understanding of how it works and what it costs.
- Participants usually compare car clubs to driving a private car or getting a private taxi.
- Non-users think car clubs are expensive and complicated, but users say they are cheap and straightforward.
- The availability of vehicles is a benefit in urban areas, and a barrier in rural areas.

Participants who had used car clubs spoke about Zipcar, Enterprise Car Club, Norwich Car Club, or they described closed-group pooled car arrangements such as a shared fleet of cars at work or a trial for a community pool car shared with neighbours and organised through an app. Those who don't use car clubs had awareness of them having seen branded vehicles or designated parking spaces, but had very low awareness of how the service actually works.

When talking about the benefits and drawbacks of car clubs, participants tended to compare them to driving a private car or getting a private taxi.

Perceptions vs experience

The biggest contrast of perception and experience is the impression that the services are expensive and complicated. Non-users considered this confusing, and this uncertainty was a key barrier that would put them off trying out or even researching car clubs. Participants who used car-clubs said they were cheap and straightforward to use and suggested that service providers better advertise the simplicity of the set-up to prevent potential users being put-off.

Designated car-club parking and flexibility to leave vehicles in convenient locations were key motivations for participants to use car clubs, and this prompted suggestions that the Government could help to create more designated parking to maximise this benefit. The availability of vehicles (or lack of these) is thought to have a big impact on whether participants choose to use car clubs, and there was a sense that Government should aid service providers to increase the size of fleets, especially in areas where availability is currently preventing local uptake.

> **"You can drop it off wherever, which is especially good if you're going into central London because parking is a nightmare so it's better to ZipCar".**
>
> (Male, Depth, weekly car club user)

Participant story

Tom doesn't own a car and first used ZipCar when he moved house, having seen an advert that vans were also available. At his new address there's normally a ZipCar parked right outside the flats, so he finds this the most logical option for ad hoc journeys due to the convenience. When he moved into the flat, ZipCar offered him an initial credit for cheaper rides which encouraged him to try it out.

Based on the views of those who used car clubs, this option performed against the four main priorities as follows:

- **Convenience:** Participants found car clubs to be extremely convenient, provided they were in an area where the vehicles are readily available. Flexibility was a key benefit for those who valued one-way journeys, dropping the vehicle off wherever suits them and being able to book by the hour or minute. Designated car club parking was also an important feature, especially if travelling around an area with limited parking.

  Users of these services who did not own a private car valued not having to worry about the additional complications that came with owning a car – the insurance, MOT, tax and petrol. This made car-clubs particularly appealing to the 'uncommitted and open minded' and 'couples who share a car' user types (see chapter 9). Using an app to check for available vehicles and parking spaces was described as helpful and easy.

  > **"All-inclusive, non-restrictive, liability free. Don't have to worry about petrol. No issues so far"**
  >
  > (Male, Depth, monthly car club & ride-pooling user)

- However, for those participants who live in rural areas with limited car club availability (the 'rural car dependents'), the service is not so convenient as there are unlikely to be any vehicles nearby, let alone at the time they wish to travel. They said that if more local people used the service, then availability would improve; relying on a club car being available for a return journey is considered a risk if availability is low at the destination. One participant suggested that car clubs should allow pre-booking for return journeys to help more people use the service to get to work.

- **Cost:** Car club users found this option to be cost effective compared to a private car or getting a taxi. Those who had not used a car club before had the perception that it would be expensive.

- **Comfort:** Car club fleet cars were described as socially comfortable because they provide the same privacy as driving alone, requiring no interaction with strangers or drivers. Participants liked having a range of vehicles to choose from and said the vehicles tend to be nice models and kept clean. Car clubs where private car owners list their own vehicle for hire were apparently well regulated and vehicles checked for cleanliness. However, for those who do not enjoy driving, car club vehicles are less comfortable than traditional and shared options where another person drives.

- **Safety:** Participants had some concern that vehicles listed on peer-to-peer car club platforms may not be well maintained and therefore unsafe, but users of these services said that service providers regulate the vehicles and check that they are well maintained.

- **Other:** Participants said that car clubs were a better environmental choice than owning a vehicle but noted that there are more environmentally friendly options such as public transport. There was significant confusion among non-users about how liability, tax and petrol arrangements work for car clubs.

5. Ride-sharing

5 Ride-sharing

Definition

Ride-sharing (also known as lift sharing) is when people use an app or website to find others who plan to travel a similar journey route and arrange to share, with one of them driving the vehicle (as opposed to ride-pooling where a professional taxi driver drives). The sharers are often strangers to each other, but there are exceptions such as when colleagues use the same ride-sharing service to commute.

Chapter summary
- There was low awareness of the concept and of the individual services amongst non-users.
- Participants tended to compare ride-sharing to driving a private car or getting a train.
- There was a very strong concern about safety among participants, mostly due to being alone with a stranger. This was often considered a deal-breaker for female participants.
- Participants suggested more regulation of users and more promotion of vetting processes to reassure potential users.

Participants who had used such services spoke about BlaBlaCar, Liftshare, GoCarShare, and described some closed-group networks such as private corporate Liftshare linked to their office intranet. Participants who had not used ride-sharing services had very low awareness of them and were unsure of how the arrangements would work.

When talking about the benefits and drawback of ride-sharing services, participants tended to compare them to driving a private car or getting a train.

Perceptions vs experience

Those who hadn't used ride-sharing platforms such as Liftshare or BlaBlaCar were very concerned about the safety of getting into a vehicle with a stranger; they argued that the other person may be dangerous, or that their driving style or condition of their vehicle may not be safe. Non-users shared the perception that there was little or no regulation over the drivers and vehicles, describing it as like "modern hitchhiking". They said that the severity of their safety concerns prevented them from considering ride-sharing services as a viable option, even after learning more from users' experiences.

Those who had used such ride-sharing platforms said that there are thorough checks on drivers and their vehicles, and that the user review system is effective because people leave honest feedback, taken seriously by service providers. Users did acknowledge that there may still be some risk but said that they personally were comfortable with this level of risk given the convenience, cost and relative comfort compared to getting a train. They suggested the Government could play a bigger role in regulating the

safety of these services, but also that service users should better communicate how safety is regulated so that potential users can make a more informed decision about the level of risk.

> **"They should give more information about how vetting works to reassure people."**
>
> (Female, Group, Manchester, daily car-pool user)

Participant story

Camilla first used GoCarShare the day after her train to work was delayed, as it frequently was. It was recommended by her friend, otherwise she wouldn't have tried it. She was initially uneasy about it as there weren't many users which led her to question the trustworthiness of the service. There is another user who lives near her, and she shares a journey with that person twice a week. Camilla is used to sharing with that one person now but would still be unsure about sharing with another stranger for the first time.

Based on the views of participants who used peer-driven ride-sharing, this option performs against the four main priorities as follows:

- **Convenience:** Users spoke about the convenience of travelling door-to-door and being able to agree flexible arrangements that suit both parties. This contrasts with trains, which are seen as being indirect and inflexible. Ride-sharing was seen as a good option if carrying luggage or awkward items. However, making arrangements with strangers was seen as relatively unreliable as they may cancel late notice or not turn up, but users said that feedback and review systems help alleviate this concern for them.

  Using ride-sharing often requires forward planning so is considered less convenient. And in rural areas the lack of users results in limited availability and consequently less choice about time and route.

- **Cost**: Participants said that using this type of ride sharing is often cheaper than getting the train to another city and cheaper than driving alone as the petrol cost is shared. They also reported liking being able to haggle or agree a suitable price between the driver and passenger.

- **Comfort:** Participants who had not used this type of transport were worried about being comfortable making conversation with a stranger, especially if making a longer journey or if the other person was unpleasant in some way. They also worried that the vehicle itself might be dirty or uncomfortable. Those who had used ride-sharing said that they had 'been lucky' and had positive social experiences during the journeys, with user reviews meaning that the cars tend to be clean.

- **Safety:** Participants who had not shared in this way had very strong concerns about the safety of getting in a vehicle with a stranger and said they would not consider it. Female participants in particular were more likely to say they were most worried about the threat of assault and, potentially, a threat to their life. To a lesser extent they also worried about dangerous driving and

the safety of the vehicle if not properly maintained. But participants who had used these services said that the process was well regulated through thorough checks and a user feedback system. Some employers have closed group corporate Liftshare networks, and participants said this lowered the perceived risk by allowing them to 'semi-vet' the other user before sharing with them.

"I wouldn't share with somebody who doesn't work at my organisation and doesn't have a photo… you can always semi-vet them on what department they're in and who they know by looking at their work skype profile"

(Female, Depth, monthly ride-sharing user)

6. Ride-pooling

6 Ride-pooling

Definition

People use an app or website to book a taxi ride that they share with another service user with a similar journey route. There is a therefore a taxi driver present, and neither service user drives the vehicle.

Chapter summary

- Ride-pooling was **synonymous with UberPool**, and there was **very high awareness** of this service.
- Participants tended to compare ride-pooling with getting a private taxi or public transport. They considered **it to be a cheaper and therefore more justifiable version of getting a taxi** instead of public transport.
- There was **less of a concern about safety** than there was for ride-sharing, because ride-pooling has a professional taxi driver also present, reducing the risk associated with sharing with a stranger.

Ride-pooling was synonymous with UberPool; participants did not refer to any other service providers of this type. The alternative to ride-pooling was a private taxi, if they were happy to spend more for comfort and a direct route, or public transport if the cost of a taxi could not be justified.

Perceptions vs experience

Non-users worried that sharing their journey with a passenger that they don't know would be awkward or unpleasant. This point was appreciated by those who actively used UberPool, however they said their experience of sharing had been more positive, usually relaxed, pleasant, and even something to enjoy once they had gotten used to it. Even when regular UberPool users had had exclusively positive experiences, they believed that they had been 'lucky so far' and assumed that this was probably not the normal sharing experience. This may be due to a general scepticism about sharing with strangers.

Participants suggested that the Government create ride-sharing 'meeting stations' at key locations, similar to bus stops, and that service providers should make ride-pooling options just as prominent on the booking app as private car options so that customers see this option clearly. They also suggested that the Government play a bigger role in ensuring safety.

Participant story

In the week, Charlie uses public transport to go to work. On the weekend, he uses his own car when travelling around with the family. Charlie mainly uses ride-pooling for socialising; when meeting friends in the evening or going to the pub. In the past he would have got a bus or private Uber home, but UberPool makes getting taxis affordable, and he likes the additional social aspect too. There's always a concern that he might share with someone who has drunk

> too much or fancies a chat when he's not in the mood, but this isn't something that he has personal experience of.

Based on the views of participants who used UberPool for ride-pooling with a taxi driver, this option performed against the four main priorities as follows:

- **Convenience:** When talking about convenience, participants described similar benefits to peer-driven ride-sharing; it is more convenient than using public transport, and the drop-off and pick-up points are normally within close proximity to the start and end destination. Participants liked that UberPool does not require forward planning (unlike peer-driven services), that they felt in control of the journey and could check arrival times and routes on the app in real-time. The key downside was that the journey may be longer than if in a private taxi, due to the routes of other passengers. It is also not possible to book an UberPool for more than two people, making it unsuitable if travelling with a group.

- **Cost:** Being cheaper than other taxi alternatives held significant appeal for participants and was often raised as the reason why they had first considered using this type of ride-sharing. Participants liked that the cost of the trip is fixed at the point of booking unlike traditional taxis, where an estimation is given. Paying via an app was also regarded as a benefit because it removes any problems that might arise around having enough cash on you, reducing interaction and removing a hassle.

- **Comfort:** This mode of transport was unanimously perceived as being more comfortable than getting public transport. Participants gave examples of social interactions they had had with co-passengers. Negative experiences included feeling obligated to engage in conversations or sharing the trip with unpleasant passengers. At a lower level, some found the intimacy of sharing the journey with a stranger slightly awkward. However, those who used UberPool say they got accustomed to sharing and meeting other people and this had become an enjoyable aspect of the journey.

- **Safety:** Participants often spoke about safety alongside comfort – feeling comfortable is partly dependent on how safe one feels. They were aware of the safety implications of sharing a journey with strangers, however, some assurance came from knowing the professional driver would be present, meaning the safety risks associated with this transport mode seemed akin to getting a normal taxi or bus. Female participants had mixed opinions about whether they would feel safe travelling independently in UberPool; one view was that the taxi driver's presence is a safeguard against strangers, another view is that the driver could also be a threat, so they feel better if with a friend.

> **"Some girls don't feel comfortable being in a car with a stranger. For example, my friend in Spain, although it's a lot cheaper than public transport she didn't think it was worth it, just cause of the safety."**
>
> (Male, Depth, monthly car club & ride-pooling user)

7. Car-pooling

7 Car-pooling

> **Definition**
> Ride-sharing that is often informal and always arranged directly (not using an app or web service) between individuals who know or meet each other and share a similar journey route.
>
> **Chapter summary**
> - There was **very high awareness** of car-pooling.
> - Participants considered the nearest **alternative to car-pooling to be driving their own car** alone or getting the bus.
> - **Sharing with people they knew was a benefit** for car-poolers, although it brought with it **social obligations** and awkward conversations about petrol money.
> - Relying on **another person's punctuality** put non-users off trying car-pooling. Others did not know anybody to share with.
> - **Employer incentive schemes have been very effective** in encouraging participants to car-pool to work.

Perceptions vs experience

Participants spoke about car-pooling in three ways.

1. **Friends:** taking friends or team members to activities or events, or sharing a long journey with a friend;
2. **Family**: parents liked being able to share responsibility over the school run and taking children to afterschool activities; and
3. **Work**: in some cases, employers encouraged car-pooling by offering incentives. Participants shared journeys with colleagues they knew already or got to know through the arrangement who lived near them and worked similar shifts.

Non-users thought that car-pooling could be inflexible by factoring in different routes and schedules. A key barrier to uptake amongst non-users was that they simply didn't know anyone who had a regular similar route to them.

Overall, users spoke positively about car-pooling, but described situations in which they would rather not be tied to the arrangement, such as wishing to making detours on the way home. Car-pooling often made the most logical sense; it is cheaper to share the journey with other people and can free up the household car for other family members when not the designated driver.

If not already involved in a car-pooling arrangement, participants had a good understanding of how the arrangement worked, and the term was very familiar due to references in American television and films.

When comparing car-pooling to other ride-sharing, participants tended to refer to driving their own car alone or getting the bus as the next alternative options.

> **Participant story**
>
> Julia lives in a rural village where the bus service finishes before she leaves work. Her friend introduced the idea of car-pooling and Julia suggested it to a couple of colleagues who live near her. Since then, she has car-pooled with these colleagues for five years and it works really well. It can get a bit frustrating when one of them has a meeting run over and they all have to wait, but they are pretty good at updating each other. Julia saves petrol by only driving every third week, and also likes that car-pooling reduces pollution and road traffic.

Based on the views of participants who car-pool, this option performed against the four main priorities as follows:

- **Convenience:** Participants felt that car-pooling offered near similar benefits to driving independently. It provides door-to-door transportation at the cost of a having to plan in advance and coordinate travel time. Participants spoke about always having to be considerate about other people's plans and factoring them into decision-making, which could be annoying or frustrating at times. They found car-pooling an inconvenience when they wanted to make last-minute, spontaneous changes to their normal routine.

  "It's not just lateness, it's if they're sick or if you have one car in the family and your husband has taken it to work."

  (Female, Group, Manchester, weekly car club and car-pool user)

- **Cost:** The financial incentive of car-pooling varied on a case by case basis. Some participants spoke about having rotas for who would be driving each week, thereby saving money over time compared to driving every day. Others found bringing up conversations around petrol money difficult which made the financial side of car-pooling awkward, in turn impacting on cost and comfort. Sometimes this was a topic that was never discussed explicitly between those sharing but an unspoken agreement had been made around it.

  "I have a friend who doesn't drive and I've got a 7-seater and 3 spare seats, so I'll take her and her children. Just casually she'll say 'I'll give you a tenner', or she'll buy the ice cream or something. It's an unwritten thing."

  (Female, Group, Norwich, daily car-pool user)

- **Comfort:** Participants spoke about times when they had felt like they had a social obligation to continue with the arrangement even if it did not completely work for them. This was one of the reasons people gave for being reluctant about car-pooling with colleagues. To get around this, participants spoke about messaging the potential sharer beforehand to establish whether they would get on.

Travelling via car-pool offers similar comfort to travelling independently in the car. In situations in which the alternative would be public transport, the benefits of car-pooling were that it is more spacious and direct. Some raised the awkwardness around car-pooling with someone with poor hygiene or being in a messy car, but these were minor comments or afterthoughts.

"Maybe if you carpool with someone you work with and then you don't like them, but you feel obligated to give them a lift. That happened to my mate."

(Male, Group, Manchester, occasional ride-sharing user)

▪ **Safety:** Participants see car-pooling as a relatively safe arrangement. They said this was because they were sharing the journey with people they already knew or at least knew of. Concerns about safety were around sharing the journey with someone who drove badly.

▪ **Other:** Although not a top priority, participants liked that car-pooling was a more environmentally friendly way of travelling around. While it was not considered a determining factor, there was the sense that it might feature in participants' reasoning for why they continued car-pooling.

8. Demand responsive transport (DRT)

8 Demand responsive transport (DRT)

Definition
Shared transport such as dial-a-ride or community buses, requested for specific locations and times, often for those with limited mobility. While dial-a-ride was the focus of DRT recruitment and discussions during this research, other new and innovative examples include ViaVan, and ArrivaClick.

Chapter summary
- There is very low awareness of **new DRT modes** such as ViaVan, and users of dial-a-ride services reported very low awareness among non-users as a barrier to up-take.
- Dial-a-ride users **struggle to use alternatives** because of poor accessibility and reliability.
- The next best alternative was considered to be **private taxis**, but users had found downsides, particularly drivers being impatient and trips to be expensive.
- Potential dial-a-ride users are put off by **the stigma** of losing independence, but users say they have actually **gained independence**.

Demand Responsive Transport (DRT) encompasses shared transport such as dial-a-ride or community buses, requested for specific locations and times. Participants did not use or know about new and innovative DRT services, with the exception of one discussion group participant who described ViaVan as a good service that fills the gaps in existing public transport routes. These services are very different to the dial-a-ride services discussed as they are often booked via an app and have a wider user base.

All of the DRT users we spoke to (via depth interviews) used community **dial-a-ride** services provided for those with limited mobility, and this section of the report covers these participants' views and experiences.

DRT users described the difficulties they had experienced for some or all of their journeys, and how this affects the options available to them. This had informed the decision-making processes they employ when choosing between available options.

What matters to DRT users?

Participants shared some of the priorities with the other shared mobility users involved in the research. However, they also had additional and often more important priorities.

- **Accessibility:** Having a vehicle that they can physically get in and out of was the most important priority for DRT users and encompassed wheelchair access, a carer being able to accompany them, and a driver or helper available to assist.

- **Reliability:** Reliability was highly important, especially when travelling to the hospital for an appointment.

- **Convenience**: Getting picked up and dropped off as close to the start and end of their journey as possible was important to minimise any walking to stations or meeting points. Whereas users of other shared mobility services considered the speed of journey very important, dial-a-ride users did not as long as it was reliable.

- **Comfort:** The term 'comfort' took on a different meaning for dial-a-ride users, who spoke about anxiety and physical pain, with drivers, staff or other passengers making them feel more or less at ease.

- **Cost**: Participants thought that cost was important, especially if budgeting on a pension, but felt that with factors such as accessibility and reliability to consider, their options were limited and consequently cost was rarely a deciding factor.

- **Safety**: Participants had health conditions that made it unsafe for them to drive, or sometimes risky for them to travel without assistance.

As with all of the other shared mobility users, those using DRT spoke about how the nature of their journey affected the factors that they prioritised. Reliability was fundamental when deciding how to travel to hospital appointments, and if their health condition was causing them more pain or anxiety than usual on a particular day, they would prioritise a door-to-door service and seek to avoid interactions with members of public.

How else do dial-a-ride users get around?

Other than dial-a-ride services, these participants either drove themselves, booked a private taxi, caught the bus, or got lifts from family members and friends.

Driving was described as good for independence and comfort, especially if they owned a Motability vehicle designed for accessibility and were able to drive safely. Having a blue badge meant that parking was usually available in towns and at destinations, with the important exception of hospitals. All DRT users spoke about not being to park at the hospital, and the anxiety of potentially missing appointments despite being in the car park ahead of time. This problem was so persistent that driving was not considered a viable option for travelling to and from hospital appointments.

Private taxis were another method that participants used to get to hospital, mainly because they did not require parking and provided a door-to-door service. Users can also request a wheelchair accessible taxi. However, despite being a reliable method to get to appointments, participants did not like using private taxis; they can be extremely expensive, and participants said that even the drivers with wheelchair accessible taxis can be unfriendly and express impatience, contributing to anxiety and discomfort.

> **"I found [taxi drivers] are quite impatient, I felt on edge. When I'm being helped it sends my mental health all over the place. I volunteer at a shop and we get a lot of people in**

> **wheelchairs getting dropped off in taxis, but even watching the drivers with them, I can't deal with that."**
>
> (Female, Depth, weekly DRT user)

DRT users said that bus services are a cheap option but also that routes are often not direct, necessitating catching two buses to get to the hospital. They had experience of buses not allowing them enough time to get off the bus, resulting in them getting off at the next stop and getting home alone. Buses are often very busy, and this can present further challenge for disabled participants who said they have a low immune system and are susceptible to catching illness, or that their disability causes them anxiety when in public.

> **"I've never used a bus because I heard on local forums that people argue with wheelchair users, like ladies with their buggies and stuff, about who gets priority. I've seen the buses with their ramp, and they lower it down which looks ideal, but I don't think I would, I panic."**
>
> (Female, Depth, weekly DRT user)

Participants similarly struggled to use trains in which passengers bump into them, or the services are not accessible or well signposted. Train staff who provide assistance were described as friendly, but there had been experiences of unreliable pre-booked assistance not turning-up. Participants described being worried about getting off the train, especially if there is a gap between the train and the platform.

Dial-a-ride services are used to get to hospital appointments, travel to shops, visit friends and family and to go to regular social or activity clubs.

- **Accessibility:** The vehicles are fit for purpose and completely accessible, and also have staff available to assist users onto the vehicle.

- **Convenience**: Participants said that DRT journeys may take a bit longer than most other methods, but they are reliable. They were confident that if they booked a ride and informed the service provider of the details of their hospital appointment, they would get there in time. The door-to-door service means they do not need to struggle to a bus stop or change transport modes mid-journey. The journeys were easy to book over the phone, but carers suggested that there should also be an option for booking online.

- **Comfort:** Participants praised the friendly, caring and patient nature of the dial-a-ride staff they had encountered. Journeys were comfortable and peaceful without members of the public causing them stress.

- **Cost**: DRT services were seen as fairly cheap, and easy to book and pay over the phone although, again, carers said that they would like the option of being able to book and pay online.

Barriers and scope to improve

- **Low awareness and perceived stigma** were the two biggest barriers to use that dial-a-ride participants identified. They thought that awareness of the service is very low amongst those who are eligible, and those who know about it are sometimes hesitant if they do not want to feel that they are losing independence, or if they assume that they are not old enough or in sufficient need to use the service.

- The main suggestion that DRT users made was an **awareness campaign** to make sure eligible people know about dial-a-ride, and to reduce the stigma associated with using it. They said that the Government should fund advertising on TV and radio, and should put information in hospitals and on Age UK's website, as well as proactively contacting people who have registered as disabled. The key messaging should be that dial-a-ride is a way to take back independence as opposed to losing independence, and images should show a range of ages and disabilities using the service.

- Participants also suggested **more funding** be put towards dial-a-ride services, that services also be available on evenings and weekends, and that operators arrange social outings to help overcome the loneliness that some dial-a-ride users may experience.

9. Conclusions

9 Conclusions

9.1   What contextual factors lead to participants using shared mobility?

Types of participants and lifestyles

The lifestyle, life-stage, and geographic location of participants was often key to the types of journeys they regularly made and their decision to use shared mobility or traditional modes of transport. Here we have grouped the lifestyle and life-stage traits which affected transport decisions, into some 'types' of sharer. Some of those we spoke to fell into more than one type, for example a couple that share a car may also be busy parents.
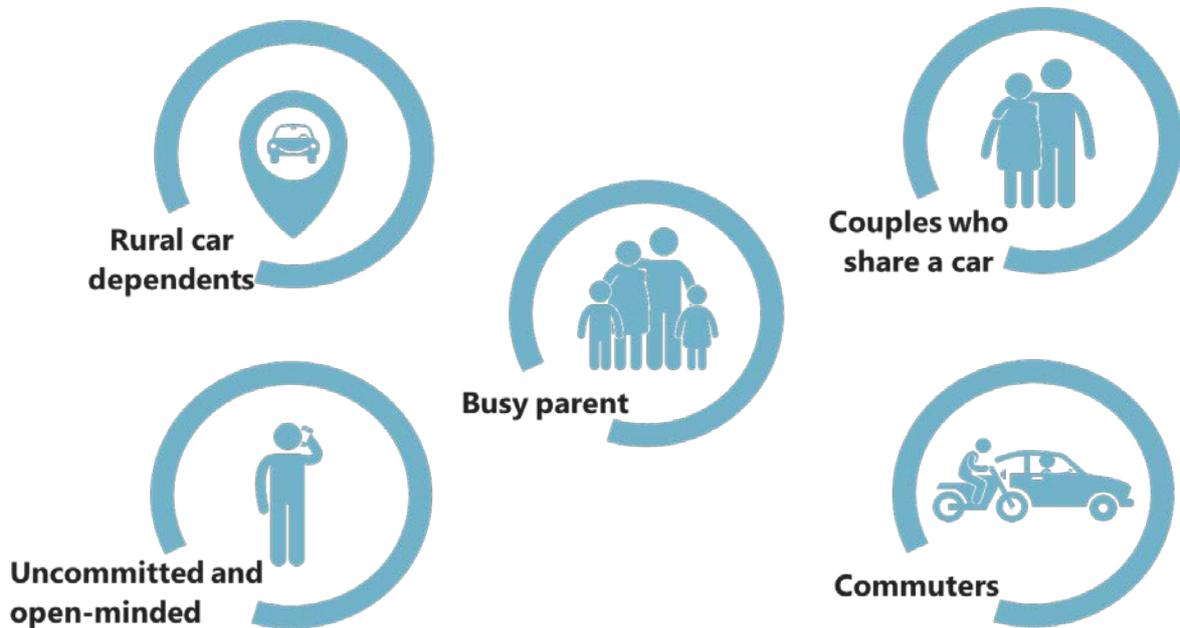
- **Uncommitted and open-minded**: This group was younger, didn't have children and didn't have much need for a private vehicle. They talked about avoiding the costs and burden of car ownership. Aside from getting to work, they made journeys for social and leisure purposes; travelling to play sports, visit other cities and go to festivals, for example. They were more comfortable with sharing with strangers than other participants, and more likely to enjoy this social aspect of **ride-sharing**.

- **Busy parents:** These participants spoke about 'ferrying the kids around' to school and other activities. Often juggling work and home commitments, they rely heavily on their car to travel at short notice, and with enough space to carry their children and their friends. Public transport could be too difficult if travelling with children, and these participants were likely to **car-pool** and take turns with other parents to drive children to activities. **Car-clubs** also suited this group due to the vehicle's space, seats, privacy and the service's flexibility.

- **Couples who share a car:** These participants shared a car with their partner, which meant that they could not always use the car when they needed to. However, this inconvenience did not warrant

the additional cost of owning a second car and so they supplement the main car with public transport and shared mobility. They spoke about using **car clubs**, **ride-sharing**, **ride-pooling** and **car-pooling** when their own car wasn't available.

- **Commuters**: They spoke about getting to and from work in the most efficient and cost-effective way, as the time and costs of daily commuting add up throughout the week. Comfort was valued but was a second order priority compared to keeping costs down and ensuring a punctual arrival.

- **Rural car dependents:** These participants lived in rural areas with unreliable and/or limited transport alternatives. **Owning a car** was an essential component of their day-to-day lives and the transport mode used most frequently and for most types of journeys. These participants were likely to face barriers to the availability of trying to use car clubs, ride-sharing and ride-pooling.

Limitations and drawbacks of traditional modes

Participants told us they use shared mobility when the trade-off between priorities such as cost, comfort, convenience and safety provided by the traditional modes of transport available to them did not meet requirements, while a shared journey would. Common examples include:

- Trips to an airport or festival where a taxi is **too expensive**, a car requires **expensive parking**, but public transport takes **too long** and is uncomfortable with luggage. Ride-sharing, ride-pooling and one-way car club journeys fill this gap in provision.

- Regular short trips between social destinations (such as a restaurant or pub) late at night and possibly after drinking, when a **comfortable ride** is wanted. In these scenarios, public transport is detrimental to enjoyment of the evening due to lower comfort, and taxis are **too expensive** for these journeys. Car-clubs, ride-sharing and ride-pooling are inexpensive, more direct, comfortable, social and sometimes safer than public transport or walking.

Shared mobility options often overcame a specific limitation with traditional modes, such as reliability (frequently cancelled trains) or the lack of availability of a private car. They also often fulfilled more of the four priorities by compromising partially on some – such as being more expensive than public transport but cheaper than a private taxi – whilst delivering better convenience and comfort.

Incentivising shared mobility

- **Central designated parking:** Participants said that they often chose to use a car club rather than drive their private car if there was designated car club parking available at the destination, especially if the destination was in a built-up area with limited parking. There was a suggestion that more designated parking be created in popular destinations to encourage uptake and reduce the number of private vehicles in these areas.

- **Parking schemes run by employers:** Employer initiatives to encourage staff to share journeys were described as being effective by participants. Such schemes offer cheaper, reserved or more

convenient parking for employees who arrived in the same vehicle. Participants suggested that the Government contribute financially to such schemes.

- ▪ **Financial incentives:** Participants suggested different ways in which sharing could be financially incentivised, such as opt-in schemes where proven sharing led to a rebate in road tax.

9.2   What barriers or potential barriers might suppress take-up?

We found three main barriers:

1. **Awareness:** Aside from the ones they use, participants were often unfamiliar with the other types of shared transport, particularly peer driven ride-sharing such as Liftshare. They suggested a role for Government to run an awareness-raising campaign to promote the benefits for users, communities and the environment, and to build recognition and understanding of some of the different methods of sharing.

2. **Confusion and uncertainty**: Even when aware of the different types of shared mobility, participants were often unsure about how these worked or were confused about key details, with some myths in evidence particularly around car-clubs.

3. **Availability**: In rural areas where there is poor public transport provision, there is also often low availability of shared mobility options due to the small number of users. In these areas, it is felt that driving a private car remains the only practical option for most types of journey.

4. **Safety concerns:** This was the biggest and most challenging barrier for participants who felt that sharing a vehicle with a stranger was too dangerous. They said that they would be unlikely to change their mind on this. This type of concern was a barrier for ride-sharing almost exclusively, with a smaller impact on ride-pooling due to the presence of a taxi driver. This wasn't a barrier for car-pooling or car clubs where they would know the other person or would be alone with the vehicle.

5. **Desire to travel alone:** An aversion to sharing a vehicle with someone else was often due to a fear of having awkward conversations, a concern about being reliant on the other sharers' timekeeping, or the participant valuing private time to unwind or prepare on their way to or from work/their destination.

9.3   Impact on use of traditional modes of transport

Participants who could drive described different impacts of shared mobility on private car use. One example was the use of shared mobility to **supplement** their own private vehicle, such as when the family car was unavailable, when driving would not be responsible (e.g. going out to drink), or when their destination has limited parking but designated car-club parking. For these participants, shared mobility did not impact their car ownership, but did reduce their use of their car to some extent. In instances

where participants' car ownership had been directly impacted by the availability of shared mobility, they said they had chosen to use shared mobility **instead** of buying a second household car or instead of owning any car at all. They found ownership to be a hassle, too expensive, or impractical for their location.

There are some types of journeys where shared mobility options were not seen as suitable or appealing options. For example, if travelling through a city with heavy road traffic, shared mobility cars and taxis are just as likely to get caught in the same congestion and public transport would be a better alternative. On the other hand, if there is ample parking at the destination, and a private vehicle is available, participants thought that shared mobility options do not compete with the comfort and convenience of driving themselves.

10.Appendices

10 Appendices

10.1 Group materials

E. Own car

F. Underground/metro

19-040590-01

#1

G. Car-Clubs

H. Ride-sharing services

You can **borrow/rent** a car on a **short-term basis**, and use it without the owner there. You might use it for **flexible one-way trips, or round trips**.

The vehicles may be owned by an individual who lends out their own car via an app or website, or it might be part of a fleet owned by a car-club organisation.

zipcar wheels when you want them

drivy

Co-wheels carclub

You use an **app or website** to find other people with a common or **similar journey route**, and **arrange to share a ride**.

Some people offer to drive and pick up passengers, and others look for people who are driving their way who can give them a lift.

BlaBlaCar

INTRODUCING:
uberPOOL

liftshare travel happy

I. Car-pooling

When **people who know each other** (or are introduced by somebody) decide to share journey's because they have a common or **similar journey route.**

This is arranged directly (without an app or service). They may take turns to drive, and it is often an **informal arrangement**.

#1

Suggestion 1:	Suggestion 2:	Suggestion 3:	Suggestion 4:
A nationwide scheme should help employers to push out persuasive initiatives and rewards to encourage sharing, such as reserved premium parking.	Discounts for car-clubs, subsidised by local authorities.	Special parking permits for ride-sharing service users, particularly in urban areas.	Car scrappage scheme that provides you with credits that can help pay for journeys on public transport and car clubs.

Suggestion 5:

What should happen:

Why would it make sharing a better option for drivers?

Who should make it happen?

19-040590-01 #2

10.2 Discussion guides

Groups

(5 mins) 1.   Introduction and background

Introduce self, Ipsos MORI, independent research organisation, here to gather your opinions. Purpose of discussion:

We are going to talk about the transport that you use, and what you think about different types of transport particularly if/when you share a ride or a vehicle with other people.

- Doing groups like this around the country, and interviewed other participants over the phone
- You'll find out more as the discussion progresses

Explain tone and nature of discussion:
- Relaxed and informal
- No right or wrong answers
- We are keen to hear about everyone's views and experiences; we are after a range of opinions, not seeking consensus
- Please feel free to disagree with one another; just keep it polite
- We will make sure everyone gets a chance to share their opinion
- Please try to avoid talking over one another – means the recorder does not work so well / note taker may not be able to hear
- Everything you say is confidential – MRS rules
- Get permission to record
- Plenty to get through, so the moderator may have to move people on from time to time – not that we're not interested in what you have to say
- Mentions any observers / video / viewing facility
- Clarify length of group (90 minutes)
- Any other housekeeping – fire alarms, facilities, etc.

(5 mins) 2.   Ice-breaker

In pairs, introduce yourselves to each other...your first name, whereabouts you live, and what type of transport you used to travel here today.
Then introduce your partner to the rest of the table.

(20 mins)   1.   Views on transport options
Can you tell me the different types, or modes, of transport people can use around here?
WRITE UP ON FLIPCHART

What matters to you/what do you look for in a type of transport?

Now, here are some you've come up with and others too. HAND OUT GREEN AND HANDOUT #1 BLUE CARDS FIRST
FOR BLUE ONES, HOLD UP SEQUENTIALLY:
- Do you use this?
- Why/why not?
- What's it like?
- What are the advantages/pros?
- What are the disadvantages/cons?

FOR DRIVING:
- **Why do you drive on your own? PROBE: Choice or necessity?**

- Do you ever share a journey by car? Who with? Why?

FOR GREEN ONES:
- Anyone here ever used this?
- And who hasn't?
- What do you think about this option?
- What have you heard about it?

RANKING
- ORDER THEM IN A VERTICAL ORDER ON THE FLIP CHART AND DISCUSS DECISIONS AND DISAGREEMENTS AS GO
- E.g. Why is car pooling better than the bus. Why is it better than driving alone?

NOW TAKE BLUE ONES AWAY, EXPLAIN GOING TO FOCUS ON GREEN

HAVE PARTICIPANTS MOVE INTO GROUPS ACCORDING TO THE TRANSPORT TYPE THEY USE (car-club, internet-based ride-sharing services, or informal car-pooling). *This is so that you and they can see who uses which type and can more easily ask questions and discuss each other's experiences in the next exercise.*

PUT THE CARD FOR EACH TRANSPORT TYPE IN FRONT OF EACH GROUP SO THAT THE OTHERS CAN REMEMBER WHICH GROUP IS WHICH.

(30 mins) 2. Transport type focus

We're going to look at these three transport types in turn now: Car-clubs, ride-sharing services, and car-pooling.

We are going to look at actual experiences and perceptions (i.e. views, whether true or not) of what it's like to use these types of transport, because both are just as important as each other when looking at how to encourage uptake of sharing. So, I'm after experiences and views – again, there are no right or wrong answers...

FOR EACH TRANSPORT TYPE. WRITE ON FLIPCHART:

TITLE: (CAR-CLUB/RIDE-SHARING/CAR-POOLING AND EXAMPLES)

READ DESCRIPTION

AND DISCUSS FOR 10 MINS BEFORE MOVING TO NEXT TRANSPORT TYPE ON A NEW FLIPCHART SHEET

FLIPCHART COMMENTS AS YOU GO, USING DIFFERENT COLOURED POST-IT NOTESS:
- E.g. PURPLE POST-ITS: Perception
- E.g. GREEN POST-ITS: Experience

1. Car-clubs
2. Ride-sharing services
3. Informal car-pooling

PROMPT NON-USERS, AND FLIP CHART USING PURPLE POST-ITS:
- What do you think about this?
- Why haven't you used it?
- What do you think are the benefits and drawbacks for this type of transport?

PROMPT USERS, AND FLIP CHART USING GREEN POST-ITS:
- What do you think about this service?

- Does your experience differ much from the perceptions?
- Why do you use this and for what kind of journeys?
- What are the benefits and drawback for this type of transport?

PROMPT ALL:
- What's good about this type of transport then?
- What could be improved? Is it perception or experience?
- Who's responsible for doing this?
- What do you think Government can do?

(20 mins)   3.   Possible interventions

We are going to talk about some possible ways that sharing could be encouraged in the UK, what the Government could do, councils do, what employers could do etc.

RE-CAP FROM PREVIOUS SESSION, ALL THE THINGS THAT COULD BE IMPROVED.
- What changes or ideas might help to improve shared transport for you, or for other people?
- What would encourage uptake of shared journeys?

CAPTURE INITIAL IDEAS ON FLIPCHART.

I'm now going to show you some suggestions that we've heard before. Some of these we heard during the interviews that we are doing as part of this project, and some have come from other research projects that explored sharing.

READ EACH OF THE FOLLOWING SUGGESTIONS OUT, DISTRIBUTE HANDOUT #2 AS YOU DO.

- Suggestion 1: A nationwide scheme should help employers to push out persuasive initiatives and rewards to encourage sharing, such as reserved premium parking.
- Suggestion 2: Discounts for car-clubs, subsidised by local authorities.
- Suggestion 3: Special parking permits for ride-sharing service users, particularly in urban areas.
- Suggestion 4: Car scrappage scheme that provides you with credits that can help pay for journeys on public transport and car clubs

FOR EACH:
- Good idea?
- What is good about it?
- What don't you like/think will work?

AT END:
- Which one(s) do you think is/are best?
- Why is that?

IN PAIRS TAKE 5 MINUTES TO THINK OF ANOTHER IDEA:
Think of another idea to help make shared transport a more appealing or more practical option for drivers.
PROBE FOR EACH:
- Why do you say that?
- What should be done?
- How would this idea make sharing a better option?
- How would it work?
- Who do you think is responsible for making this happen?

(10 mins)   Wrap-up
At the end now, thank you for your input and opinions – it's been really helpful.

Before we finish, please each write down on a post-it: what is the single best thing that would encourage people to use any of the types of shared transport we have discussed today?

HAVE EACH PERSON SHARE THEIR'S WITH THE GROUP. THANK AND CLOSE

In-depth interviews

(5 mins) Introduction and background

INTRODUCE SELF AND IPSOS MORI – an independent research organisation, here to gather your opinions and hear about your experiences.

We are going to talk about the transport that you use, and what you think about different types of transport, particularly journeys where you share a ride or a vehicle with other people.

EXPLAIN TONE AND NATURE OF DISCUSSION:
- Relaxed and informal
- No right or wrong answers
- Plenty to get through, so the I may have to move the conversation on from time to time – not that we're not interested in what you have to say
- Clarify length of interview - 45 minutes
- Participation is entirely voluntary, and you are free to pause or end the interview at any time.
- I will be recording this call so that we can accurately report of has been said.
- Get permission to record
- All answers will be confidential and anonymous, in line with the MRS code of conduct, and you will not be individually identified in the report; our client (DfT) will not know you took part

Do you have any questions about the research?

Can I check that you are happy to participate?

(5 mins) Warm-up
What typical journeys do you make in a normal week?
e.g. work, family, shopping, errands
- What are the transport types you use to do this?
  Car, bus, train, taxi, bike
- Why do you use these types of transport for these journeys and not others?
- Do you always make the same transport choice, or do you switch between /combine types of transport?
- Which do you do most often, and which less often?

Are there many transport options for you around here?

Is there anything that makes your transport journey easier, or harder?

How do you find out about the transport options in your area?
- PROBE: see them/used them before, word of mouth, advert etc.

(10 mins)   Exploring current transport sharing habits
At recruitment, we talked a little about sharing journeys or vehicles. For the rest of our conversation we won't be talking about public transport such as buses or trains but will be focusing on other types of shared journeys. This can be when you share a journey with someone else, or when you use a shared vehicle with or without another passenger.

Do you ever share vehicles or journeys with others?

CAPTURE THEIR IMMEDIATE RESPONSE, THEN TALK BREIFLY THROUGH THE THREE CATEGORIES.
- Do you do any other journeys that fit these descriptions?
- Which apps or companies/service-providers do you use?
- Any others?

NOTE DOWN THE TYPES/SERVICES MENTIONED BY PARTCIPANT.

IF CATEGORY IS NOT CLEAR, PROMPT ACCORDING TO CATEGORY DESCRIPTIONS BELOW, IN ORDER TO CATEGORISE; e.g. do you drive the vehicle yourself? If not, is the driver a taxi driver or just somebody sharing their journey? Are any other passengers in the vehicle?

Category: Car clubs (also known as car-sharing)
Description: Unattended access to cars for short-term rental. This includes round-trips and 'flexible' one-way trips. Vehicles may be owned by individuals and lent out on a peer-to-peer basis via an intermediary platform, or form part of a fleet owned by a single organisation.
Examples: Zipcar, DriveNow, Enterprise/ City Car Club, Drivy, Co-wheels, eCarClub, easyCar/Turo, HiyaCar. Local examples: Norfolk Car Club, Norwich Car Club, Greater Manchester Car Club, in Sheffield: predominantly Enterprise City Car Club.

Category: Ride-sharing (using an app or service)
Description: Includes sharing of rides between people with a common or similar journey route – Arranged online or via an app.
Examples: UberPOOL, Liftshare, BlaBlaCar, Waze Carpool.

Category: Car-pooling
Description: Includes informal sharing of rides arranged between directly between individuals who know/meet each other and who share a common or similar journey route.
Examples: Not applicable

IF MORE THAN ONE TYPE USED, ENSURE EACH IS PROBED DURING THE FOLLOWING:

What is good about using this type of service?
- How do they compare with other options?
- If you didn't use this service/transport, what would be the next best option?
- Is there anything that isn't so good about this type of journey?

What types of journeys do you do this for?
- Why these journeys?
- How often do you make this type of journey?
- How familiar are you with the person you are sharing with?

Do other people you know share rides with other people?
- Who is that, and what type of journey do they share?
- Why do they do this?
- What do they say about it?

<u>(5 mins)</u>　　　　Decision-making for shared services

When did you first hear about the service/arrangement(s) that you now use?
- Did you spend long thinking about it before trying it?
- What made you actually try it out?

When did you first start sharing journeys/ vehicles?
- Did it work well for you straight away?
- What was not so good about it?
- What did you like about it?

Did you, or do you, consider other options to this type of transport?
- What were they, have you tried it out?
- If this type of transport stopped being available, what alternative would you use instead?
- IF NOT A CAR OWNER: how likely would be to start driving a private car of your own?

What are the key things that you would advise someone who is thinking about trying this type of service/transport for the first time?
- Are there some people or situations who are more suited or less suited to this transport?
- Are there groups of people who you think would benefit most from this type of transport?

What do you think stops other people from trying this type of transport?
- What could remove this barrier?
- Is there anything the government could do to help address this barrier?

(15 mins) Maximising benefits and minimising risks of this transport

Let's think about your last journey using X. We are going to talk through the different stages of that journey and your experience – positive or negative:
- Arranging/booking it
- Convenience of pick-up/travelling when you wanted to
- Pick-up and meeting the driver/other passengers
- The journey itself
- Drop-off
- Billing/paying

Overall, what was your experience?
- What was the best feature of this journey?

What could government do to make this type of service/transport better?
- Why this?
- How could this be done?
- What else?
REFER BACK TO THE STEPS OF THE PROCESS AS LISTED ABOVE.

(5 mins) Reflections and wrap up

We are coming to the end of our session now, thanks for all of your opinions and views during this conversation.

What would you say is the single most important thing that encourages use of shared transport?

Do you have anything else that you would like to add?
THANK AND CLOSE

10.3 Screeners

Groups – screener

INTRODUCTION:

Hello, my name is [Recruiter]. I am currently recruiting people to take part in a research project. I would like to ask you some questions and, if you are eligible, invite you to participate.

Before we go any further, just some information about who we are. I work for…

…

…

If you decide that you no longer wish to take part, you can also withdraw from the research at any time, including after this interview is complete.

Q1.	**Would you be interested in taking part?** SINGLE CODE ONLY		
	Yes	1	CONTINUE
	No	2	THANK AND CLOSE

Q2.	**Do you or any members of your immediate family work in any of the following areas, either in a paid or unpaid capacity?**		
	Advertising	1	THANK AND CLOSE
	Public relations (PR)	2	THANK AND CLOSE
	Market Research	3	THANK AND CLOSE
	Journalism	4	THANK AND CLOSE
	Local government	5	THANK AND CLOSE
	Professional Driver: E.G. HGV/LGV, Bus/Coach/Taxi driver etc	6	THANK AND CLOSE
	No, none of these	7	CONTINUE
	Don't know	8	CONTINUE

Q3.	**Have you participated in a workshop, interview or focus group discussion for a market research company in the last six months?** SINGLE CODE ONLY		
	Yes	1	THANK AND CLOSE
	No	2	CONTINUE

Q4.	**Which of the following best describes your gender?**		
	Male	1	RECRUIT A MIX
	Female	2	RECRUIT A MIX
	In another way (please write in):	3	RECRUIT A MIX
	Prefer not to say	4	RECRUIT A MIX

Q5.	**How old were you on your last birthday?** WRITE IN & CODE EXACT AGE		
	Exact Age		
	Under 18	1	THANK AND CLOSE
	18-34	2	PRIMARY QUOTA: SEE QUOTAS
	35-54	3	PRIMARY QUOTA: SEE QUOTAS
	55-75	4	PRIMARY QUOTA: SEE QUOTAS
	75+	5	PRIMARY QUOTA: SEE QUOTAS

Q6.	**Do you personally own or have access to a car or van e.g. a car/van owned by another household/family member that you can use?** SINGLE CODE ONLY		
	Yes – own car/van	1	RECRUIT A MIX
	Do not own car/van but have access to one	2	RECRUIT A MIX
	No do not own/have access to	3	RECRUIT A MIX

Q7.	**How often, if at all, do you use public transport such as buses, trains or trams?** SINGLE CODE ONLY		
	Every day (7 days a week)	1	RECRUIT A MIX
	Most days (4-6 times a week)	2	RECRUIT A MIX
	1-3 days a week	3	RECRUIT A MIX
	1-3 times a month	4	RECRUIT A MIX
	3-4 times a year	5	RECRUIT A MIX
	Once or twice a year	6	RECRUIT A MIX
	Less often/not at all	7	RECRUIT A MIX

Q8.	**The next question is about use of shared transport, shared mobility services. Which if any of these do you <u>ever</u> make use of nowadays?** MUTLICODE OK		
	Shared transport/car clubs which you can become a member of, and which allows access to locally parked cars that can be used on demand *e.g. Zipcar, DriveNow, Enterprise/ City Car Club, Drivy, Co-wheels, eCarClub, easyCar/Turo, HiyaCar.*	1	<u>PRIMARY QUOTA:</u> <u>SEE QUOTAS</u>
	Internet-arranged or app-based ride sharing where you can arrange lift shares with people you don't know, *e.g. UberPOOL, Liftshare, BlaBlaCar, Waze Carpool*	2	<u>PRIMARY QUOTA:</u> <u>SEE QUOTAS</u>
	Car pools you have arranged yourself with people you know *e.g. sharing lifts to work with colleagues*	3	<u>PRIMARY QUOTA:</u> <u>SEE QUOTAS</u>
	Demand responsive transport shared transport provided in response to requests from users specifying desired locations and times of pickup and delivery *e.g. dial-a-ride (see location quota pages for local examples)*	4	<u>PRIMARY QUOTA:</u> <u>SEE QUOTAS</u>
	None of these	5	CLOSE

ASK FOR QUOTA RECRUITING TO:

Q9.	**How often do you use this type of service?** SINGLE CODE ONLY		
	Every day (7 days a week)	1	<u>SEE QUOTAS</u>
	Most days (4-6 times a week)	2	<u>SEE QUOTAS</u>
	1-3 days a week	3	<u>SEE QUOTAS</u>
	1-3 times a month	4	<u>SEE QUOTAS</u>
	3-4 times a year	5	<u>SEE QUOTAS</u>
	Once or twice a year	6	<u>SEE QUOTAS</u>
	Less often/not at all	7	CLOSE

Q10.	**For what sort of journeys do you use this service for?** SINGLE CODE ONLY		
	To get to and from work	1	RECRUIT A MIX
	For business/to attend business meetings	2	RECRUIT A MIX
	For short journeys to visit family and friends	3	RECRUIT A MIX
	For short journeys to visit places (for leisure)	4	RECRUIT A MIX

Q11.	**Social grade**			
	A	1	RECRUIT A MIX
	B	2	RECRUIT A MIX
	C1	3	RECRUIT A MIX
	C2	4	RECRUIT A MIX
	D	5	RECRUIT A MIX
	E	6	RECRUIT A MIX

Depths – screener

INTRODUCTION:

Hello, my name is [Recruiter]. I am currently recruiting people to take part in a research project. I would like to ask you some questions and, if you are eligible, invite you to participate.

Before we go any further, just some information about who we are. I work for…

…

…

If you decide that you no longer wish to take part, you can also withdraw from the research at any time, including after this interview is complete.

Q1.	**Would you be interested in taking part?** SINGLE CODE ONLY			
	Yes	1	CONTINUE
	No	2	THANK AND CLOSE

Q2.	**Do you or any members of your immediate family work in any of the following areas, either in a paid or unpaid capacity?**			
	Advertising	1	THANK AND CLOSE
	Public relations (PR)	2	THANK AND CLOSE
	Market Research	3	THANK AND CLOSE
	Journalism	4	THANK AND CLOSE
	Local government	5	THANK AND CLOSE
	Professional Driver: E.G. HGV/LGV, Bus/Coach/Taxi driver etc	6	THANK AND CLOSE
	No, none of these	7	CONTINUE
	Don't know	8	CONTINUE

Q3.	**Have you participated in a workshop, interview or focus group discussion for a market research company in the last six months?** SINGLE CODE ONLY		
	Yes	1	THANK AND CLOSE
	No	2	CONTINUE

Q4.	**Which of the following best describes your gender?**		
	Male	1	RECRUIT A MIX
	Female	2	RECRUIT A MIX
	In another way (please write in):	3	RECRUIT A MIX
	Prefer not to say	4	RECRUIT A MIX

Q5.	**How old were you on your last birthday?** WRITE IN & CODE EXACT AGE		
	Exact Age		
	Under 18	1	THANK AND CLOSE
	18-34	2	RECRUIT A MIX OF AGES
	35-54	3	RECRUIT A MIX OF AGES
	55-75	4	RECRUIT A MIX OF AGES
	75+	5	RECRUIT A MIX OF AGES

Q6.	**Do you personally own or have access to a car or van e.g. a car/van owned by another household/family member that you can use?** SINGLE CODE ONLY		
	Yes – own car/van	1	RECRUIT A MIX
	Do not own car/van but have access to one	2	RECRUIT A MIX OF AGES
	No do not own/have access to	3	RECRUIT A MIX OF AGES

Q7.	**How often, if at all, do you use public transport such as buses, trains or trams?** SINGLE CODE ONLY		
	Every day (7 days a week)	1	RECRUIT A MIX
	Most days (4-6 times a week)	2	RECRUIT A MIX
	1-3 days a week	3	RECRUIT A MIX
	1-3 times a month	4	RECRUIT A MIX
	3-4 times a year	5	RECRUIT A MIX
	Once or twice a year	6	RECRUIT A MIX
	Less often/not at all	7	RECRUIT A MIX

Q8.	**The next question is about use of shared transport, shared mobility services. Which if any of these do you <u>ever</u> make use of nowadays?** MUTLICODE OK		
	Shared transport/car clubs which you can become a member of, and which allows access to locally parked cars that can be used on demand e.g. ZipCar, Co-wheels, Drivenow	1	<u>PRIMARY QUOTA:</u> <u>SEE QUOTAS</u>
	Internet-arranged or app-**based ride sharing** where you can arrange lift shares with people you don't know, e.g. liftshare.com, blablacar.com	2	<u>PRIMARY QUOTA:</u> <u>SEE QUOTAS</u>
	Car pools you have arranged yourself with people you know e.g. sharing lifts to work with colleagues	3	<u>PRIMARY QUOTA:</u> <u>SEE QUOTAS</u>
	Demand responsive transport (shared transport provided in response to requests from users specifying desired locations and times of pickup and delivery e.g. dial-a-ride).	4	<u>PRIMARY QUOTA:</u> <u>SEE QUOTAS</u>
	None of these	5	CLOSE

ASK FOR QUOTA RECRUITING TO:

Q9.	**How often do you use this type of service?** SINGLE CODE ONLYSINGLE CODE ONLY		
	Every day (7 days a week)	1	<u>SEE QUOTAS</u>
	Most days (4-6 times a week)	2	<u>SEE QUOTAS</u>
	1-3 days a week	3	<u>SEE QUOTAS</u>
	1-3 times a month	4	<u>SEE QUOTAS</u>
	3-4 times a year	5	<u>SEE QUOTAS</u>
	Once or twice a year	6	<u>SEE QUOTAS</u>
	Less often/not at all	7	CLOSE

Q10.	**For what sort of journeys do you use this service for?** SINGLE CODE ONLY		
	To get to and from work	1	RECRUIT A MIX
	For business/to attend business meetings	2	RECRUIT A MIX
	For short journeys to visit family and friends	3	RECRUIT A MIX
	For short journeys to visit places (for leisure)	4	RECRUIT A MIX

Q11.	**Social grade**		
	A	1	RECRUIT A MIX
	B	2	RECRUIT A MIX
	C1	3	RECRUIT A MIX
	C2	4	RECRUIT A MIX
	D	5	RECRUIT A MIX
	E	6	RECRUIT A MIX

Ben Marshall
Research Director

 Paul Carroll
Associate Director

Jennifer Gisborne
Senior Research Executive

Imogen Drew
Graduate Research Executive

For more information

3 Thomas More Square
London
E1W 1YW

t: +44 (0)20 3059 5000

www.ipsos-mori.com
http://twitter.com/IpsosMORI