KANTAR

Department for Transport

Perceptions of current and future e-scooter use in the UK

Summary report

January 2021

Contents

Glossary of terms

- **Base size:** The number of respondents answering a survey question.
- **Cognitive testing:** An in-depth interviewing method to determine the reliability and validity of survey questions.
- **Fieldwork:** The period when face-to-face interviews were conducted.
- **Omnibus survey:** A method of quantitative survey research where data on a wide variety of subjects is collected during the same interview.
- **Random location quota sampling:** A form of quota sampling that combines elements of random sampling and quota sampling. Once a random sample is drawn, interviewers are given quotas of different types of respondents (e.g. gender, age and working status) so that the achieved sample is broadly representative of the population of interest. Interviewers vary their calling pattern to ensure that they attempt to contact people during the day, in the evening and at weekends.
- **Representativeness:** Similarity of the sample profile to benchmark population statistics, such as the Office for National Statistics mid-year population estimates.
- **Sample size:** The number of people included in the sample (a subset of the population).
- **Social grade:** Social grade is a classification system based on occupation. It contains the following categories:
    - A: Higher managerial, administrative and professional
    - B: Intermediate managerial, administrative and professional
    - C1: Supervisory, clerical and junior managerial, administrative and professional
    - C2: Skilled manual workers
    - D: Semi-skilled and unskilled manual workers
    - E: State pensioners, casual and lowest grade workers, unemployed with state benefits only
- **Age groups:** Age brackets are a way of grouping respondents of different ages into groups. They contain the following categories:
    - 16-24 years old
    - 25-34 years old
    - 35-44 years old
    - 45-54 years old
    - 55-64 years old
    - 65-74 years old
    - 65+ years old

    - 75+ years old

- **E-scooter:** Also known as an electric, motorized or electronic scooter.
- **Statistical significance:** A statistical test to determine whether relationships observed between two survey variables are likely to exist in the population from which the sample is drawn. We only report on findings that are statistically significant at the 95% level.
- **Weighting:** An adjustment made to the data to ensure that survey results are representative of the target population (in this case, all adults aged 16+ in Great Britain).
- **Claimed knowledge:** A sum of the respondents that claimed to know 'A lot', 'a little' or 'a fair amount' at any given question.
- **Claimed awareness:** A sum of the respondents that claimed to know 'A lot', 'a little', 'a fair amount' or 'hardly anything, but have heard of it at any given question.

1. Executive Summary

1.1 Background

1.1.1 Policy background

- In March 2019, the Government published the 'Future of Mobility: Urban Strategy', which committed to creating an environment for innovation and investment to allow the UK to become a global leader in transport innovation.
- Four policy priorities were identified (known as the Future of Mobility Grand Challenge), including a commitment to a significant regulatory review which would include micromobility vehicles (namely, small mobility devices, designed to carry one or two people, for example, e-scooters and e-bikes) and the options for the testing regimes of such vehicles.
- A further policy priority was the need to ensure robust decision making. The Strategy identified the need to expand the evidence base to facilitate policy development and ensure that new transport technology would meet the needs of all users.
- Micromobility – transport provided by very light vehicles – has been identified as one area in which regulation is currently acting as a barrier to the potential benefits of new technologies. E-scooters - plug-in electric vehicles with two, three and occasionally four wheels - are currently governed by the same rules and regulations that apply to motor vehicles, meaning that they are required to meet the standards around road tax, insurance, licence regime, etc. and technical safety outlined in the *Road Traffic Act 1988.* Whilst it is legal to buy or sell an e-scooter in the UK, riding them on public roads, pavements or cycle lanes is illegal.
- In January 2020, the Department for Transport (DfT) commissioned Kantar's Public Division to carry out a nationally representative survey of public attitudes and behaviours in relation to e-scooters. The survey was conducted before the implementation of regulatory changes brought in to accommodate e-scooter trials.

1.1.2 Research Objectives and Methodology

- The overall purpose of the survey was to provide insight to inform the future policy direction for e-scooters, with five specific research objectives:
    - To understand people's awareness of e-scooters and the frequency and purpose of e-scooter use.
    - To understand the likelihood of buying and/or hiring e-scooters, and reasons underlying future use.
    - To identify perceived advantages and disadvantages of e-scooters, and potential barriers to their adoption.

    - To identify public perceptions and preferences toward different policy and regulatory measures for e-scooter users.
    - To understand how views differ across different socio-demographic sub-groups.
- The survey was conducted on the Kantar weekly face-to-face omnibus survey in January and February 2020. In total, 4,046 adults aged 16+ in Great Britain were interviewed. Further information about the sample and survey methodology is provided in Appendix A, and the full questionnaire is available in Appendix B.
- The omnibus survey was conducted through random location sampling, a high-quality form of quota sampling in which sample points were allocated through a random selection.
- The sample is representative of individuals aged 16 or over living in Great Britain. Data has been weighted to the profile of adults in Great Britain. This is based on age, gender, region, urbanity, working status and ethnicity.

1.2 Key findings

1.2.1 Awareness and current users of electric scooters

- There was a moderate level of knowledge of e-scooters: half of respondents (53%) claimed to have some degree of knowledge. Within this, 15% knew a lot or a fair amount and 38% knew a little. Levels of knowledge were higher among males, younger respondents, those living in urban areas, and those from higher social grades. Overall awareness of e-scooters was higher (90%).
- Overall, 7% of respondents said that they had ever used an e-scooter: this was more likely among men and those aged 16-24. Respondents mainly borrowed e-scooters and levels of ownership were low (18% of those who had ever used an e-scooter owned one).
- Among regular and occasional users, a large proportion of respondents used e-scooters for fun (72%), with a quarter using them to get to a specific destination, including workplaces, local facilities and amenities, educational settings, and the homes of friends or relatives.

1.2.2 Potential future users of e-scooters

- One in ten respondents thought it was likely that they would buy an e-scooter and 15% said it was likely that they would hire an e-scooter if this service was available in city/town centres. Males, younger respondents (particularly those aged 16-24) and those living in urban areas were more likely to say they would buy or hire an e-scooter.
- For a majority (66%) of those who said they were likely to buy or rent an e-scooter, the main reason would be to reach a specific destination (work, education settings, homes of friends/family etc.), while half said they would use an e-scooter for fun. Among those intending to use an e-scooter to reach a particular destination, 58% anticipated this would be their sole means of transport to reach that destination while 37% thought they would use another form of transport as part of the journey.
- A majority of respondents (82%) who thought they would buy or hire an e-scooter anticipated that they would reduce or stop using at least one mode of transport, with walking being the most commonly mentioned transport mode that would be reduced by e-scooter use (39%).

1.2.3 Perceived advantages & disadvantages of e-scooters

- 69% of respondents could think of at least one advantage of e-scooters, while 81% could think of at least one disadvantage.
- The most commonly perceived advantages of e-scooters were reduced pollution/better for the environment, mentioned by 24% of respondents. Smaller proportions mentioned speed (16%), being fun to ride (13%), easy/convenient for short journeys (12%), easy to use/learn/little effort required (12%) and good for people who can't travel far by bike/on foot (11%).
- Safety was seen as the overriding disadvantage among respondents, cited by 53%. Within this, 41% were concerned about the safety of pedestrians, while 35% mentioned rider safety.

1.2.4 Perceptions of policy options

- Just over half of respondents (60%) thought it should be legal to ride e-scooters in cycle lanes on the road, and 42% supported the use of cycle lanes on the pavement (a section of the pavement marked out for cyclists only). Smaller proportions were supportive of e-scooters being allowed on (any part of) pavements (15%) or the road (14%).
- A minority (14%) thought that e-scooters should not be allowed in any public areas, and this was more likely among those with restricted mobility or with a disability affecting their ability to ride a bike.
- The vast majority of respondents (88%) felt it was important that helmets be made compulsory, and this was more likely to be the case among women and those living in rural areas.
- 85% of respondents thought a maximum speed limit for e-scooters was important: this view was more likely to be held by those living in rural areas and those with a disability affecting their ability to ride a bike.
- Seven in ten thought compulsory training, without the need for a test, was important: this view was more prevalent among those aged 65 and older, and those with a disability affecting their ability to ride a bike.
- Sixty-five per-cent of respondents believed it was important that users were required to pass an official test before using an e-scooter in public: this was more likely among those aged 65 or older, those from social grades C2DE (the grades are often grouped into ABC1 and C2DE; these are taken to equate to middle class and working class, respectively), and among those with a disability that affected their ability to ride a bike.

1.2.5 Final Conclusions

- In January 2020 awareness of e-scooters was high (90%), whilst knowledge of them remained lower (47%).
- Uptake of e-scooters remains very low with just seven per-cent having ever used an e-scooter, and two per-cent using an e-scooter regularly or occasionally.
- Under a tenth (9%) of respondents said they would likely buy an e-scooter if they were legal to use and a similar price to a bike. A slightly larger proportion (15%) said they would be likely to hire an e-scooter in a town or city centre in the UK if this were an option.
- Seven in ten respondents mentioned at least one advantage of e-scooters, with key themes being environmental benefits (24%), speed (16%) and the fun of riding (13%).

- Eight in ten respondents mentioned at least one disadvantage, with safety being the overwhelming concern (41% mentioned safety of pedestrians and 35% mentioned safety of riders).
- Respondents were most supportive of e-scooters being legal to ride in cycle lanes on the road (60%). Just under one in seven (14%) of respondents thought that e-scooters should not be used at all in public areas.
- The more respondents claimed to know about e-scooters, the more likely they were to report they would buy or hire an electric scooter (dependent on a change in the law).

2. Introduction

2.1 Background to the survey

In March 2019, the Government published the 'Future of Mobility: Urban Strategy', outlining a vision for urban transport innovation to transform the ways in which people, goods and services move. The Strategy committed to creating an environment for innovation and investment, supported by a flexible regulatory system, to allow the UK to become a global leader in transport innovation. Four policy priorities were identified (termed the 'Future of Mobility Grand Challenge'): implementing a flexible regulatory framework; supporting industry and local leaders; ensuring robust decision making; and continuing establishing technology-specific programmes. The Future of Mobility Grand Challenge forms a central strand of the Government's Industrial Strategy.

As part of the plan to deliver a flexible regulatory framework, the Strategy committed to a significant regulatory review which would include four new areas: micromobility vehicles (defined as small mobility devices, designed to carry one or two people, or 'last mile' deliveries, including e-scooters and e-bikes); mobility as a service; data sharing; and bus/taxi/private hire vehicle legislation. In the case of micromobility, the review would consider the options for testing regimes to ensure that a) vehicles such as e-scooters and e-bikes were safe and fit for purpose, and b) that future trials of new technologies could proceed without the need for new legislation.

With the aim of ensuring robust Government decision making, the Strategy report acknowledged uncertainty about the rate of development and consumer adoption of new micromobility transport technologies. It identified the need to expand the evidence base in this area to facilitate policy development and to ensure that new technology and services would meet the needs of all users. To this end, in January 2020, the Department for Transport (DfT) commissioned Kantar's Public Division to carry out a survey on public attitudes and behaviours related to one aspect of micromobility: e-scooters.

E-scooters - plug-in electric vehicles with two, three and occasionally four wheels - are currently governed by the same rules and regulations that apply to motor vehicles, meaning that they are required to meet the standards around road tax, insurance, licence regime, etc. and technical safety outlined in the Road Traffic Act 1988. Whilst it is legal to buy or sell an e-scooter in the UK, riding them on public roads, pavements or cycle lanes is illegal. The aim of the survey was to fill evidence gaps regarding public knowledge of, and engagement with, this form of transport. The survey was conducted in January and February 2020, before the implementation of regulatory changes brought in to accommodate e-scooter trials in the UK.

2.2 Research objectives and survey details

As previously noted, the 'Future of mobility: Urban strategy' outlined the need for new evidence to understand public perceptions of current and future e-scooter use in the UK. At the time of commissioning, there was a relative lack of research in the UK around public perceptions of, preferences for and use of e-scooters, and therefore a nationally representative survey was required to set a baseline of understanding.

The overall purpose of the survey was to provide insight to inform the future policy direction for e-scooters, with the following specific research objectives:

1. **Awareness of e-scooters amongst the general public and current usage of electric scooters**: Understand awareness of e-scooters and identify frequency and purpose of e-scooter use.
2. **Potential future users of e-scooters**: Understand the likelihood of buying and/or hiring e-scooters, and reasons underlying their future use.
3. **Perceived advantages and disadvantages of e-scooters**: Identify the perceived advantages and disadvantages associated with e-scooters, and potential barriers to their adoption.
4. **Perceptions of policy options**: Identify public perceptions and preferences toward different policy and regulatory measures for e-scooter users.
5. **Subgroup differences**: Within each of the previous objectives, delineate how views differ across different socio-demographic sub-groups.

2.3 Methodology

2.3.1 Overview

Survey fieldwork was conducted on the Kantar face-to-face omnibus, a weekly omnibus survey. The omnibus survey was conducted through random location sampling, a high-quality form of quota sampling in which sample points were allocated through a random selection. Further information about the sample and survey methodology is provided in Appendix A, and the full questionnaire is available in Appendix B.

Prior to conducting the survey, DfT and Kantar jointly developed the questionnaire content. The process included a review of relevant questions asked on other survey and cognitive testing for the development of new questions.

The questionnaire was split into four key sections:

- Section 1: Awareness and use of e-scooters
- Section 2: Perceptions of current e-scooter use
- Section 3: Future expectations and usage of e-scooters
- Section 4: Demographic questions

Kantar's face-to-face omnibus runs on a weekly basis with a new wave each week. To ensure sufficient e-scooter users were picked up in the survey, the questions on awareness and use of e-scooters were placed on two waves of Kantar's face-to-face omnibus. This was because some of the questions in section 1 (on e-scooter use) were only asked of respondents who had used an e-scooter. The questions included in sections 2 and 3 were only placed on one wave of the omnibus survey, as they were asked of all respondents, not just those who had used an e-scooter. Section 4 was also included on both waves to allow sub-group analysis to be conducted across the full sample.

In the first wave 2,036 adults aged 16+ in Great Britain were interviewed and were asked all sections of the questionnaire, whereas, in the second wave of the survey, in which 2,010 respondents were interviewed, only sections 1 and 4 of the questionnaire were asked.

Wave	Date of fieldwork	Number of respondents	Sections/Questions asked
1	w/c 20th January 2020	2,036	All sections
2	w/c 27th January 2020	2,010	Section 1 (Q1-Q14) and section 4 (Q32-Q37) See appendix B for a copy of the questionnaire

The sample is representative of individuals aged 16 or over living in Great Britain, but respondents answered perception questions in relation to the UK.. Data has been weighted to the profile of adults in Great Britain. This is based on age, gender, region, urbanity, working status and ethnicity.

This report summarises the findings of the survey.

2.3.2 Study limitations

Significant differences at the sub-group level are noted in this report. Strictly speaking, significance tests can only be applied to probability samples and are not applicable to the random location design adopted for this survey. However, it can be assumed that the variance of a random location sample is similar to that of an equally specified probability sample. It has therefore been decided to flag any differences – based on a 95% confidence interval – in this report, to help users interpret the results. However, users are encouraged to treat changes flagged as significant with caution.

Given that the prevalence of e-scooter usage is low for some questions the base size falls below 100 and as such the results for these questions should be treated as indicative only. Where base sizes fall below 30 the number of responses rather than the percentages have been reported for each response category. Where this applies it has been signposted in the report.

While some regional comparisons are included in the report, it should be noted that the sample sizes in some regions are fairly low. This is particularly the case in the North East, where around 200 interviews are achieved per wave, which reflects this being the least populated region in England. As such, any differences between regions should be treated with caution.

2.4 Notes on findings

Differences are noted for the key demographic sub-groups of gender, age, social grade (social grade is a classification system based on occupation; in this report, differences between the upper social grades (ABC1) and lower grades (C2DE) are considered) and urbanity (based on the 2011 ONS rural-urban classification where an output area is treated as 'Urban' if it was allocated to a 2011 built-up area, with a population of 10,000 people or more, while all other areas are classified as 'Rural'). Other sub-group comparisons are also included where relevant, including based on region, ethnicity (due to limited sample sizes, it is not possible to compare results between different BME groups, and thus analysis focuses on comparisons of people from white backgrounds against BME groups as a collective), and car ownership.

3. Awareness and current users of e-scooters

Research objective: to understand awareness of e-scooters (amongst the general public) and identify frequency and purpose of e-scooter use.

Key findings:

- The research showed a moderate level of knowledge of e-scooters, half of respondents (53%) claimed to have some degree of knowledge (within this, 15% knew a lot or a fair amount while 38% knew a little). Reported levels of knowledge of e-scooters were higher among males, younger respondents, those living in urban areas, and those from higher social grades.
- Use of e-scooters was low: only seven per-cent of respondents had ever used one, and this was more likely among men and those aged 16-24. Respondents mainly borrowed e-scooters and level of ownership was low (18% of those who had ever used an e-scooter owned one).
- Respondents reported a variety of reasons for using e-scooters. Among regular and occasional users, a large proportion of respondents used e-scooters for fun (72%), with a quarter using them to get to a specific destination, including workplaces, local facilities and amenities, educational settings, and the homes of friends or relatives.

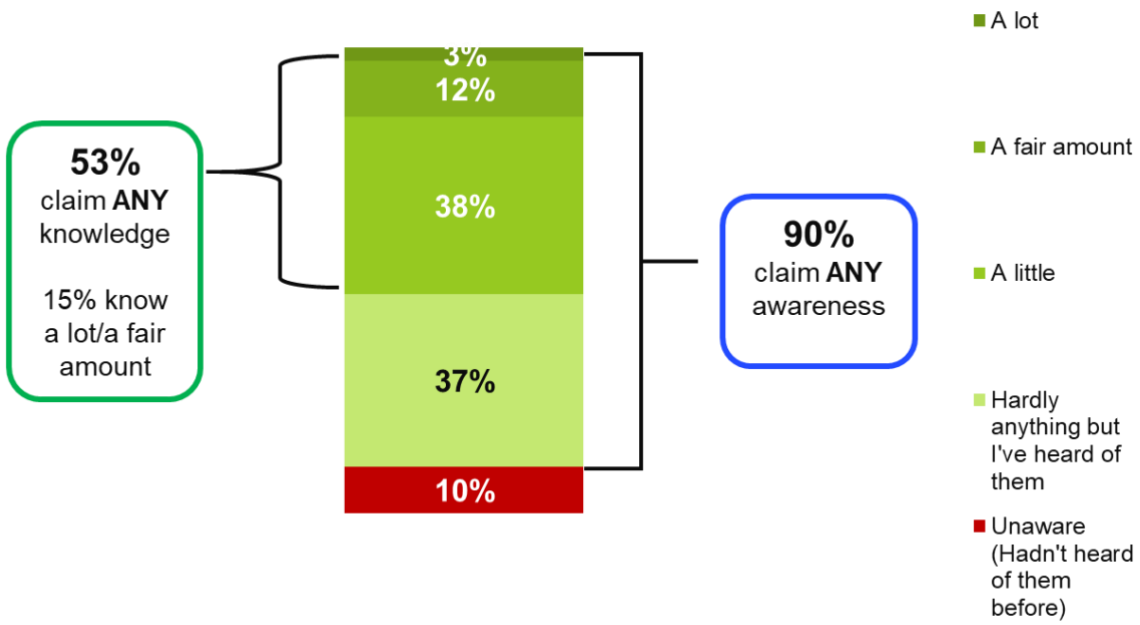
3.1 Awareness and knowledge of e-scooters

At the beginning of the questionnaire, respondents were shown a picture of an e-scooter to minimise the risk that people may confuse e-scooters with other types of scooters such as mobility scooters (please find the questionnaire in Appendix B).

Overall awareness of e-scooters was high, with nine in ten (90%) respondents claiming to have at least heard of e-scooters. Knowledge of e-scooters was lower, with around half (53%) claiming to have some knowledge of e-scooters, and only 15% 'a lot' or 'a fair amount' (figure 3.1).

Claimed awareness is a sum of the respondents that claimed to know 'A lot', 'a fair amount', 'a little', or 'hardly anything, but have heard of it'. Whereas, claimed knowledge is a sum of the respondents that claimed to know 'A lot', 'a fair amount', or 'a little'.

Figure 3.1 Awareness and Knowledge of e-scooters, January 2020



Note: *Claimed knowledge = those that know a lot + those that know a fair amount + those that know a little; claimed awareness = those that know a lot + those that know a fair amount + those that know a little + those that know hardly anything but have heard of electronic scooters*

Source: An electric or motorized scooter is a stand-up scooter with a small engine or electric motor. How much, if anything, would you say you know about electric scooters?

Base: All respondents (4,046)

Reported knowledge of e-scooters was higher among men (57% versus 49% of women), younger respondents (57% or above for age brackets below 55 versus 49% or below for age brackets above 55), those living in urban areas (54% versus 47% of those from rural areas) and those from social grade ABC1 (56% versus 50% of those in social grade C2DE).

As you might expect, those who had used an e-scooter were more likely to have heard ‘a lot’ about them (19% compared with two per-cent of those who had never used an e-scooter).

3.2 Use of e-scooters

Overall, seven per-cent of the sample population reported having ever used an e-scooter in the UK or abroad, with four percent having used one in the UK.

Usage in the UK or elsewhere was higher among men (nine per-cent versus five per-cent of women) and younger respondents (17% of 16-24-year olds versus a highest of 9% in all other age groups).

3.2.1 Regular or occasional use of e-scooters (inside or outside Great Britain)

Respondents were also asked if they would self-define as a regular or occasional user of e-scooters (respondents self-defined ‘regular’ and ‘occasional’ use at this question); overall two per-cent of the sample population defined themselves in this way. Less than one per-cent stated that they use an e-scooter regularly (<1%), whilst two per-cent said that they used them occasionally.

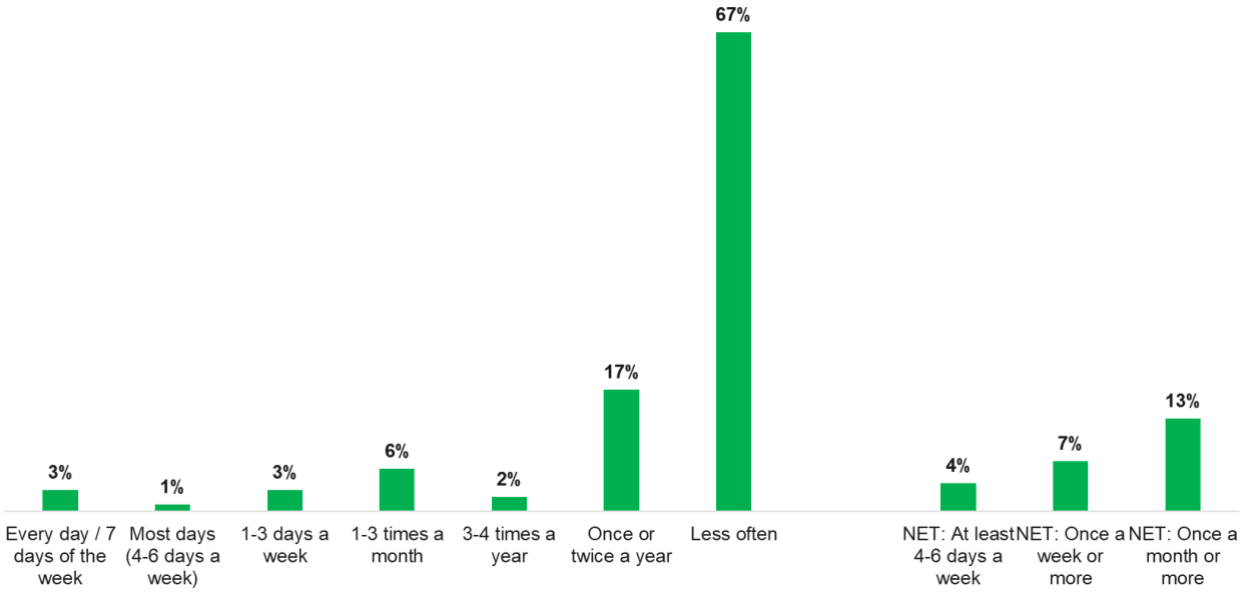
Regular or occasional use of e-scooters was higher among men (2% versus 1% of women) and respondents under the age of 65 (between 1% and 3% for age groups under 65 versus 0% for those aged 65 or over).

3.2.2 Frequency of e-scooter use

As respondents were asked to self-define whether they would class themselves as a regular or occassional e-scooter user, respondents who had ever used an e-scooter in the UK were also asked how often they used one. At this question respondents were asked to choose a time frame from a set of predefined answer codes show in figure 3.2.

The majority (67%) of respondents who had ever used an e-scooter in the UK used an e-scooter less than once a year. Only four per-cent said they used an e-scooter 4-6 days a week or more, seven per-cent said they used an e-scooter once a week or more, and 13% said they used an e-scooter once a month or more.

Figure 3.2 Frequency of e-scooter use (amongst those to have ever used), January 2020



Source: Q6 About how frequently do you use an electric scooter?

Base: All who have ever used an electric scooter in the UK (141)

3.3 E-scooter ownership

Overall, only 18% of respondents who have ever used an e-scooter in the UK reported owning one (27 respondents, of the 141 that were asked, said that they owned an e-scooter).

Those who had used an e-scooter but did not currently own one were then asked how they had used one. The majority had borrowed one without paying to use it (67%), while a further 14% had bought or owned one in the past (figure 3.3).

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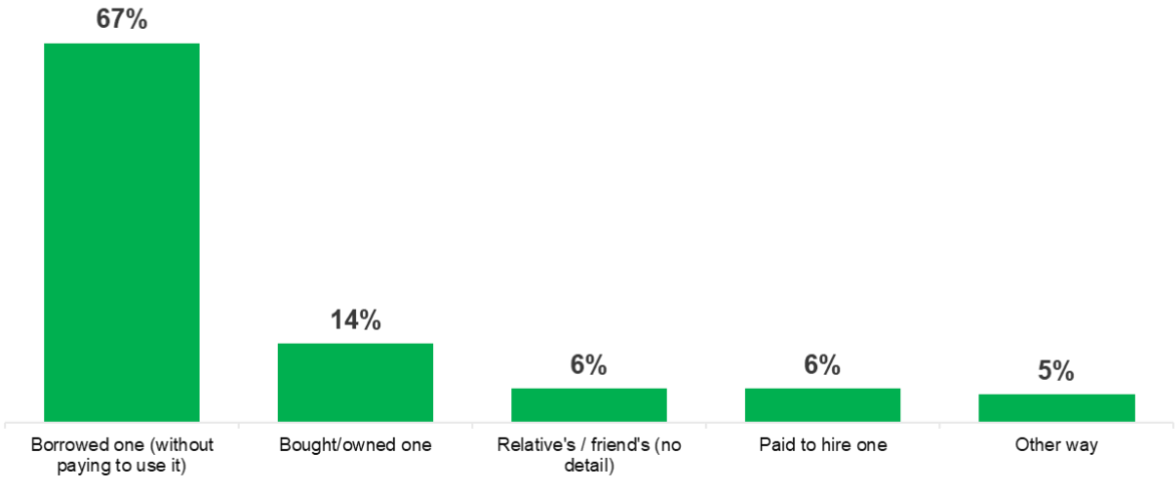
Figure 3.3 How users go about using an e-scooter, January 2020



Source: Q8 In which of these ways have you used an electric scooter?

Base: All who have ever used an electric scooter in the UK but don't own one (114)

3.4 Purposes of use amongst regular and occasional users

The majority of respondents who defined themselves as regular or occasional users of e-scooters used them 'for fun' (72%), while a quarter used their e-scooter to get to specific destinations (25%) (*Specific destinations* included: 'To get to work'; 'To get to other destinations (e.g. local shops, gym, restaurants, friends or relatives houses)'; and 'To get to school/college/university'). This result should be interpreted with caution as the base size is <50 respondents.

Respondents who used an e-scooter to get to specific destinations were then asked about the last time they used an e-scooter. Due to extremely low base sizes the number of respondents has been reported here rather than the percentage. In total, five respondents reported using their e-scooter to get to work, two respondents reported using it to get to 'other destinations' and the final two respondents reported using their e-scooter last for fun.

Of the seven respondents who said they last used an e-scooter to get to a specific destination, 6 used an e-scooter to get all the way to their destination, while only 1 respondent used an e-scooter in conjunction with another type of transport.

3.5 Shifting transport behaviours amongst users of e-scooters

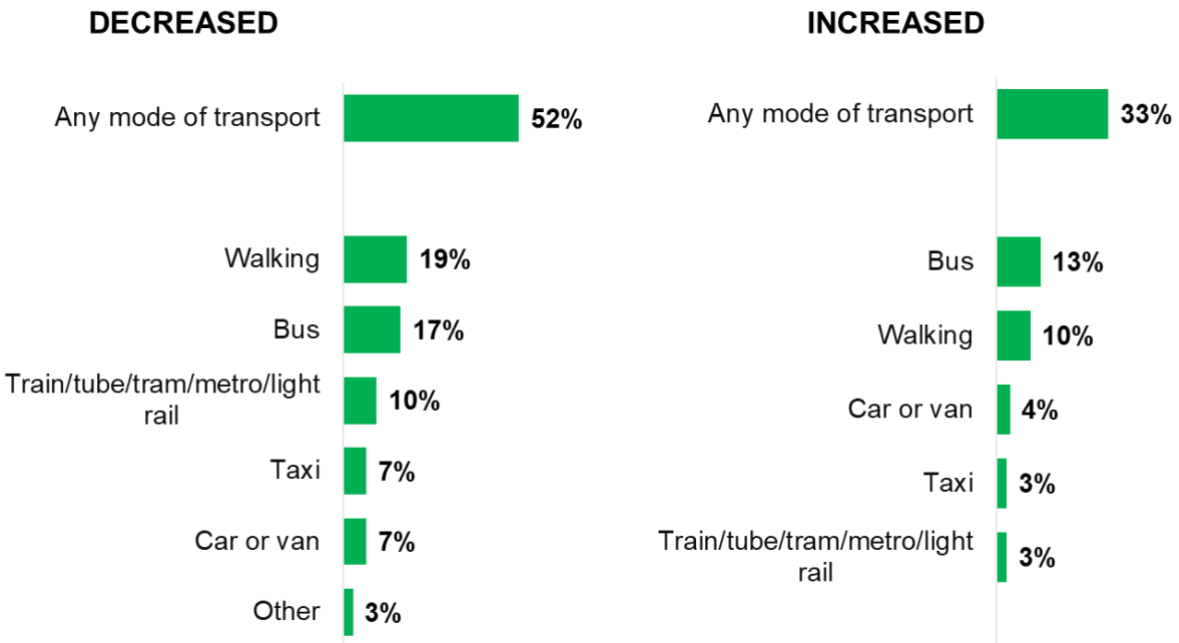
Regular or occasional users of e-scooters in the UK were asked if their use of an e-scooter resulted in them cutting down or stopping using any other modes of transport (figure 3.4). Over half (52%) reported having reduced their use of at least one mode of transport since they started using an e-scooter. The most common modes of transport respondents reported reducing were walking (19%) or catching the bus (17%). This result should be interpreted with caution as the base size is <50 respondents.

Regular or occasional users of e-scooters were also asked if their use of an e-scooter had led them to increase, or to start using any other modes of transport. A third reported having increased their use of at

least one other mode of transport (33%), with the most common being catching the bus (13%) or walking (10%). This result should be interpreted with caution as the base size is <50 respondents.

The above findings indicate that respondents' transport patterns shifted once they started using an e-scooter. Most users reduced their use of other modes of transport, but some have also increased their use. That may be because instead of catching the train, they now catch a bus and then use their e-scooter to reach their destination.

Figure 3.4 Shifting transport behaviours amongst users of e-scooters, January 2020



Source: Q12 Has your use of an electric scooter meant that you have cut down or stopped using any of these types of travel? / Q13 Some people use an electric scooter as part of a journey involving different forms of travel. Has your use of an electric scooter meant that you have increased or started using any of these types of travel?

Base: All who regularly or occasionally use electric scooters in the UK (35)

3.6 Reasons for starting using e-scooters

Regular and occasional users of e-scooters in the UK were asked why they started using e-scooters. This question was open ended, and answers were coded out of these responses. Forty-one per-cent said they started 'for fun', whilst 10% said 'it's easier'.

4. Potential future users of e-scooters

Research objective: to understand the likelihood of buying and/or hiring e-scooters, and reasons underlying their future use.

Key findings:

- One in ten respondents (9%) thought it was likely that they would buy an e-scooter if they were legal to use on the roads of the UK and in a similar price range to bikes. Fifteen percent said it was likely that they would hire an e-scooter if this service was available in city/town centres. Males, younger respondents (particularly those aged 16-24) and those living in urban areas were more likely to say they would buy or hire an e-scooter.
- A majority (66%) of those who said they were likely to buy or rent an e-scooter said the reason for doing so would be to reach a specific destination (work, education settings, homes of friends/family, shops etc.), while half said they would use the e-scooter for fun. Among those intending to use an e-scooter to reach a particular destination, 58% anticipated this would be their sole means of transport to reach that destination while 37% thought they would use another form of transport as part of the journey.
- A majority of respondents (82%) who thought they would buy or hire an e-scooter anticipated that they would reduce or stop using at least one mode of transport, with walking being the most commonly mentioned transport mode that would be reduced by e-scooter use (39%).

4.1 Likelihood of buying and/or hiring e-scooters

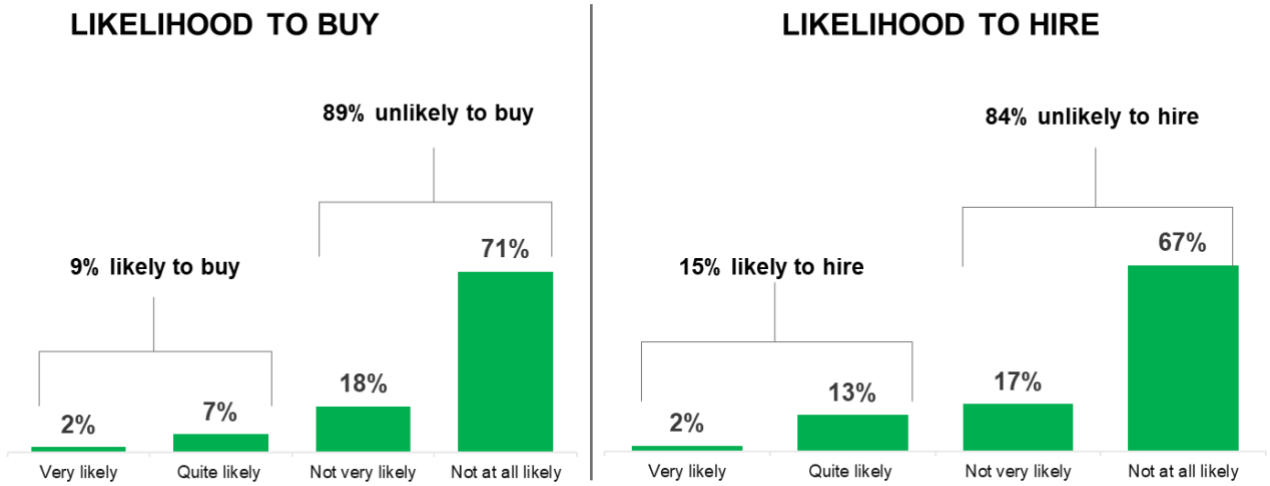
In order to explore respondents' future intentions to buy and/or hire an e-scooter in the UK, a short scenario was read out to respondents, as follows:

Now please imagine electric scooters are legal to use on the road in the UK, are a similar price range as bikes to buy, and are available to hire in some city and town centres in the same way as bikes are now.

Given this scenario, the likelihood of respondents buying an e-scooter was investigated, followed by the likelihood of them hiring an e-scooter in city or town centre of the UK (see figure 4.1).

Overall only a minority of respondents (9%) thought it was likely they would buy an e-scooter (2% very likely, 7% quite likely), while around twice as many (15%) thought it was likely that they would hire an e-scooter (2% very likely, 13% quite likely). The majority, however, said it was unlikely that they would buy or hire an e-scooter (89% and 84% respectively). Respondents were not asked why they would be unlikely to buy or hire an e-scooter.

Figure 4.1 Likelihood of buying or hiring an e-scooter, January 2020



Source: Q17. In this scenario, how likely would you be to **buy** your own electric scooter?/ Q18. In this scenario, if they were available, how likely would you be to hire an electric scooter in a city or town centre in the UK?

Base: All respondents (2,036). This question was not filtered, however, it was only asked of respondents who took part in wave 1, see section 2.3.1.

Certain demographic groups were more likely to hire or buy an e-scooter in the future:

- Men (11% likely to buy versus women 8%; 17% likely to rent versus women 13%)
- Those living in urban areas (10% likely to buy versus 6% in rural areas; 16% likely to rent versus 11% in rural areas)
- There was a pattern of decreasing likelihood to buy or rent by age (for example 16% of 16-24s likely to buy versus 3% of those aged 65+; 27% of 16-24s likely to rent versus 3% of 65+)

Previous use of e-scooters and/or having at least a little knowledge about this technology resulted in respondents reporting they would buy or rent an e-scooter under the scenario offered:

- 30% who had ever used an e-scooter said it was likely they would buy (versus 8% who had never used) and 45% said it was likely they would rent (versus 13% who had never used).
- 12% with at least some knowledge about e-scooters said it was likely they would buy (versus 3% with no awareness of this technology at all) and 18% thought it was likely they would rent (versus 4% with no awareness at all about e-scooters).
- 19% who claimed to know a lot or a fair amount said it was likely they would buy (versus 3% with no awareness of this technology at all) and 28% said it was likely they would rent (versus 4% with no awareness at all about e-scooters).

There were no consistent patterns in differences in the likelihood to buy or rent e-scooters by region. However, those in London were more likely than those in other regions to say they did not know whether they would do so (6% said they did not know if they would buy versus 2% or less elsewhere; 6% said they did not know if they would rent versus 1% or less elsewhere). More likely to say they didn't know versus other regions except for the East Midlands (to buy or rent).

4.2 Likely frequency of use of e-scooters

Those who were likely to buy or hire an e-scooter in the UK were asked to imagine they had done so and to say how frequently they thought they would use this form of transport. Over a quarter (27%) said that they

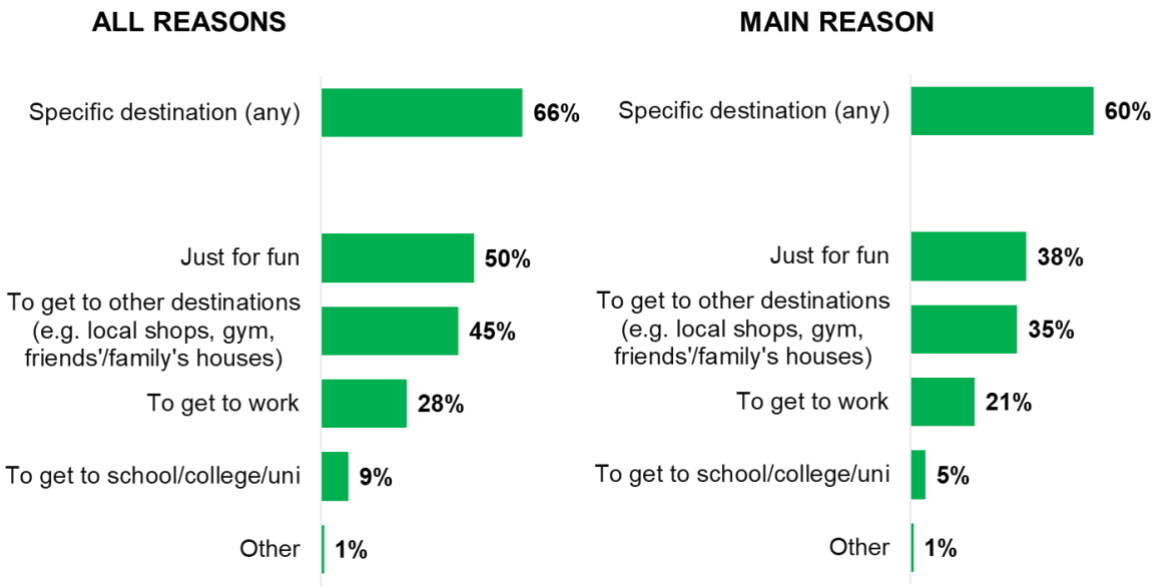
would use an e-scooter more than 4 days a week; and over half (53%) said they would use an e-scooter once a week or more often. The results were then rebased to provide figures for the full sample population. In January 2020 the likely predicted use of e-scooters was low: five per-cent of respondents thought they would use an e-scooter at least 4 days a week; nine per-cent said they would use a scooter once a week or more often; and 11% said they would use a scooter once a month or more often.

4.3 Reasons for using e-scooters

Those who were likely to buy or hire an e-scooter in the UK were asked for what purpose(s) they thought they would use this transport; the question allowed for more than one response. Figure 4.2 summarises the findings with the chart on the left showing all the reasons given for using an e-scooter and the chart on the right depicting respondents' main reason for using an e-scooter.

When considering all reasons, most respondents had a specific destination (66%) in mind, be that work, school/college/ university or another type of destination (e.g. the shops, gym, restaurants, homes of friends/family), while half said they would use the e-scooter 'just for fun' (50%). In terms of the main reason for using an e-scooter, again this was usually for a specific destination (60%), with the most commonly mentioned being to get to other destinations that are not related to work or school/college/university (35%) and getting to work (21%). Four in ten respondents (38%) said they would use an e-scooter just for fun.

Figure 4.2 Reasons for using an e-scooter, January 2020



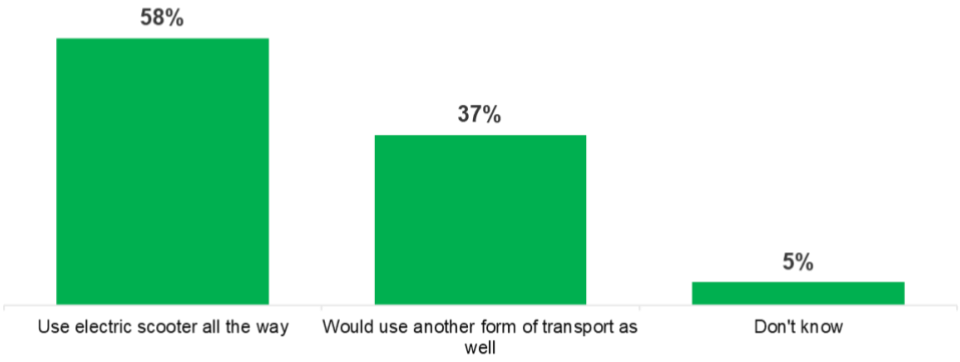
Source: Q20. Still imagining have bought / could hire an electric scooter, for what purposes do you think you might use an electric scooter? /Q21. Which of these do you think would be your main purpose for using an electric scooter?

Base: Q20 All who were likely to buy or hire an electric scooter (313)/ Q20/Q21 (main reason) All who were likely to buy or hire an electric scooter (313)

Further analysis revealed no differences in patterns of response by gender, age, urbanity, region or social grade, nor by level of knowledge or previous use of an e-scooter.

Respondents who intended to use an e-scooter to reach a particular destination were asked whether they would use the scooter to get all the way or whether they would also use another type of transport, for example a bus or a train. Figure 4.3. shows that for most (58%), the e-scooter would be the sole means of transport they would use to reach their destination, while four in ten (37%) said they would also use another form of transport to complete their journey. Five per-cent of respondents did not know.

Figure 4.3 Whether e-scooter would be sole means of reaching destination, January 2020



Source: Q22. Would you use an electric scooter to get **all the way to your destination** or would you also use another type of transport, for example a bus or a train?

Base: All who would use electric scooter last time to get to work, School, college, uni or another specific destination (188)

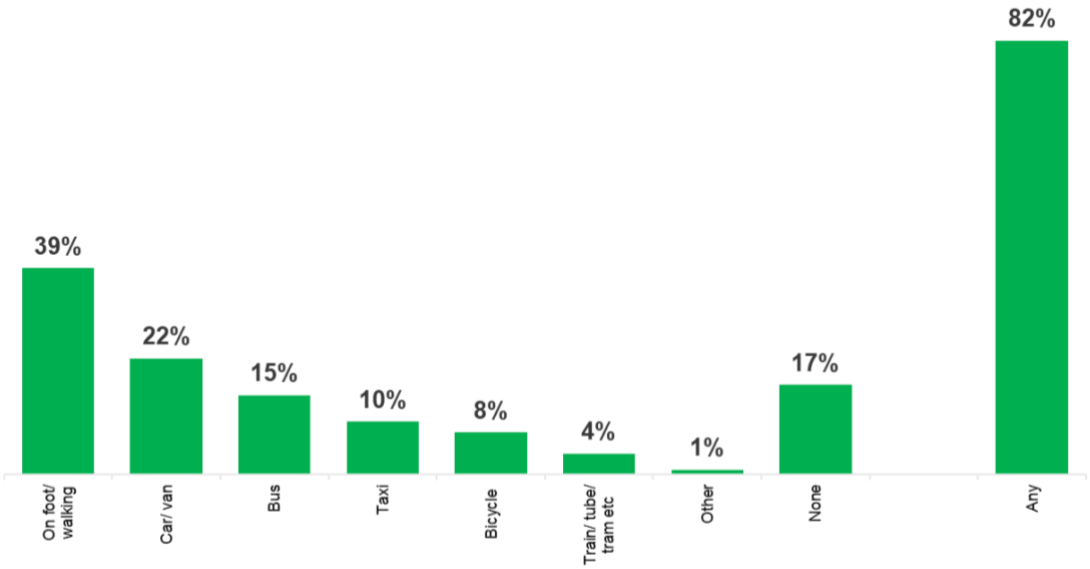
Further demographic analyses of the data revealed no patterns in response to this question by gender, age, urbanity, region or social grade.

4.4 Substitution of e-scooter for existing transport mode

To understand to what extent e-scooters might replace other modes of transport, respondents were asked whether they would reduce or stop using various transport options in favour of using an e-scooter.

Figure 4.4 shows that 82% of those who were likely to hire or buy an e-scooter in the UK thought that they would reduce or stop using at least one transport mode in favour of using an e-scooter. The most common mode that would see reduction or cessation of use was on foot/walking (39%), followed by car or van (22%), bus (15%), taxi (10%), bicycle (8%) and train/tube/tram/metro/light rail (4%).

Figure 4.4 Replacement/ reduction of use of transport modes, January 2020



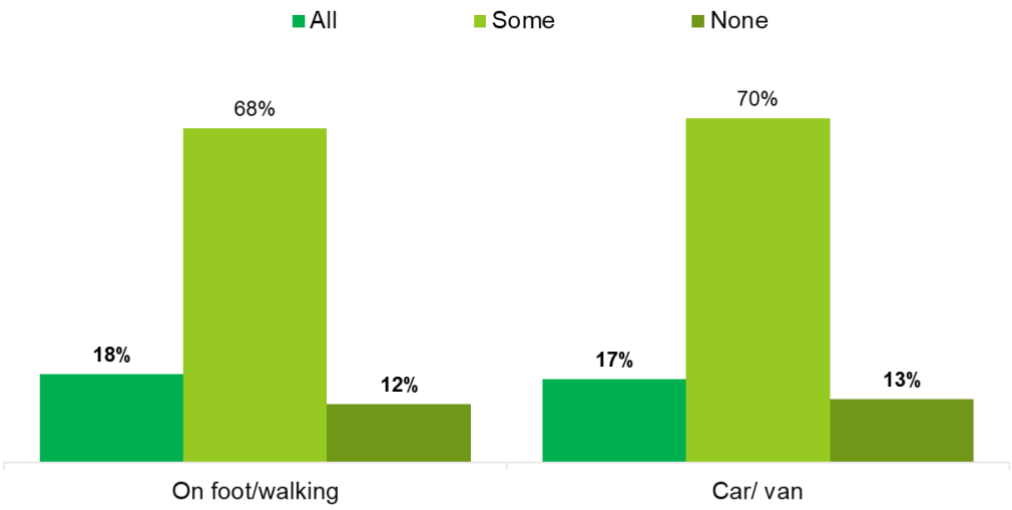
Source: Q28. Which, if any, of these ways of travelling would you reduce or stop using and instead use an electric scooter?

Base: All likely to buy or hire an electric scooter in the UK (313)

Demographic analyses by transport mode were limited by small sample sizes. However, when those who mentioned stopping or reducing their use of any transport mode were considered, this was more likely to be the case among urban dwellers (84%) than rural dwellers (68%). We have not broken this down by mode of transport due to low base sizes

In terms of whether this shift in transport mode would be for all journeys or just some, the only transport modes where this analysis was possible was for journeys made on foot and by car/van. Figure 4.5 shows that most respondents anticipated using an e-scooter to replace just some of the journeys made by each of these modes: 68% of those made on foot and 70% of those made in a car/van. This trend is consistent amongst other modes of transport too. We have not reported on the figures for other modes of transport due to low base sizes

Figure 4.5 Whether e-scooter would replace all/some journeys by mode, January 2020



Source: Q29. Would you use an electric scooter instead for all or some journeys you currently make by [transport mode]?

Base: All who would replace each transport mode use with electric scooter: On foot/walking (122); Car/van (71): Note: samples sizes < 100 should be treated with caution.

5. Perceived advantages & disadvantages of e-scooters

Research objective: to identify the perceived advantages and disadvantages associated with e-scooters, and potential barriers to their adoption.

Key findings:

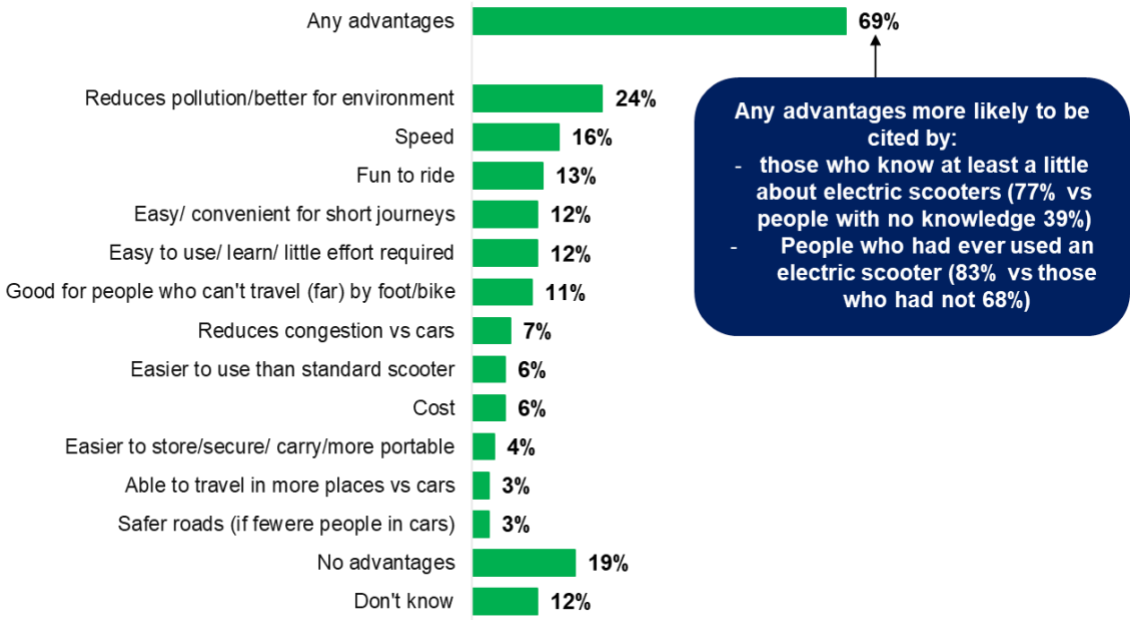
- When asked if they could think of any advantages or disadvantages of e-scooters, 69% of respondents could think of at least one advantage while 81% could think of at least one disadvantage.
- The most commonly perceived advantages of e-scooters were reduced pollution/better for the environment, mentioned by 24% of respondents. Smaller proportions mentioned speed (16%), being fun to ride (13%), easy/convenient for short journeys (12%), fun to use (12%) and good for people who can't travel far by bike/on foot (11%).
- In terms of perceived disadvantages, safety was the overriding theme, cited by 53%. Within this 41% were concerned about the safety of pedestrians (41%), while 35% mentioned rider safety.

5.1 Perceived advantages of e-scooters

Figure 5.1 shows the perceived advantages of e-scooters. The categories represent unprompted, 'top of mind' responses when respondents were asked if they could think of any advantages of e-scooters. Seven in ten respondents (69%) could think of at least one advantage (this compared with eight in ten who could think of at least one disadvantage – see figure 5.2), while two in ten (19%) said there were no advantages and 12% answered 'don't know'.

The most commonly mentioned advantage was reduced pollution/better for the environment (24%), followed by speed (16%). Thirteen per-cent thought e-scooters were fun to ride; 12% mentioned they were easy/convenient for short journeys; 12% thought that e-scooters were easy to use; and 11% thought they were good for people who couldn't travel far by bike/on foot.

Figure 5.1 Perceived advantages of e-scooters, January 2020



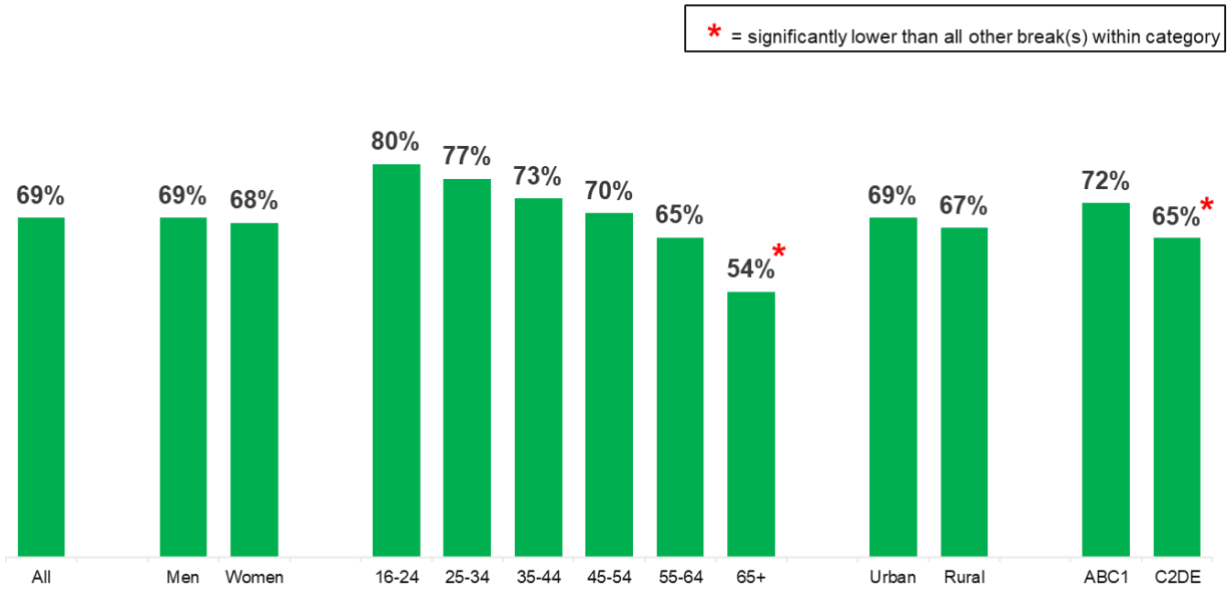
Source: Q15. What do you think are the advantages, if any, of electric scooters?

Base: All respondents (2,036). Subgroups: Know at least a little about electric scooters (978), no awareness of electric scooters (268); Ever used an electric scooter (102), never used an electric scooter (1.932). This question was not filtered, however, it was only asked of respondents who took part in wave 1, see section 2.3.1.

Looking in more detail at those who mentioned at least one advantage of e-scooters, knowledge of the technology improved respondents' perceptions. For example, as shown in figure 5.1, 77% of those who knew at least a little about e-scooters cited at least one advantage versus 39% of those with no awareness. Similarly, 83% of respondents who had ever used an e-scooter mentioned at least one advantage versus 68% of those who had never used an e-scooter.

Figure 5.2 summarises further demographic analyses and shows that those aged 65+ were significantly *less* likely than younger respondents to mention any advantages of (54% versus 65% or more in other age groups). Those in social grades ABC1 were more likely to mention at least one advantage compared to those in groups C2DE (72% versus 65% respectively). There were no differences by gender or between those living in urban and rural locations.

Figure 5.2 Proportions mentioning any advantages of e-scooters, January 2020



Source: Q15. What do you think are the advantages, if any, of electric scooters?

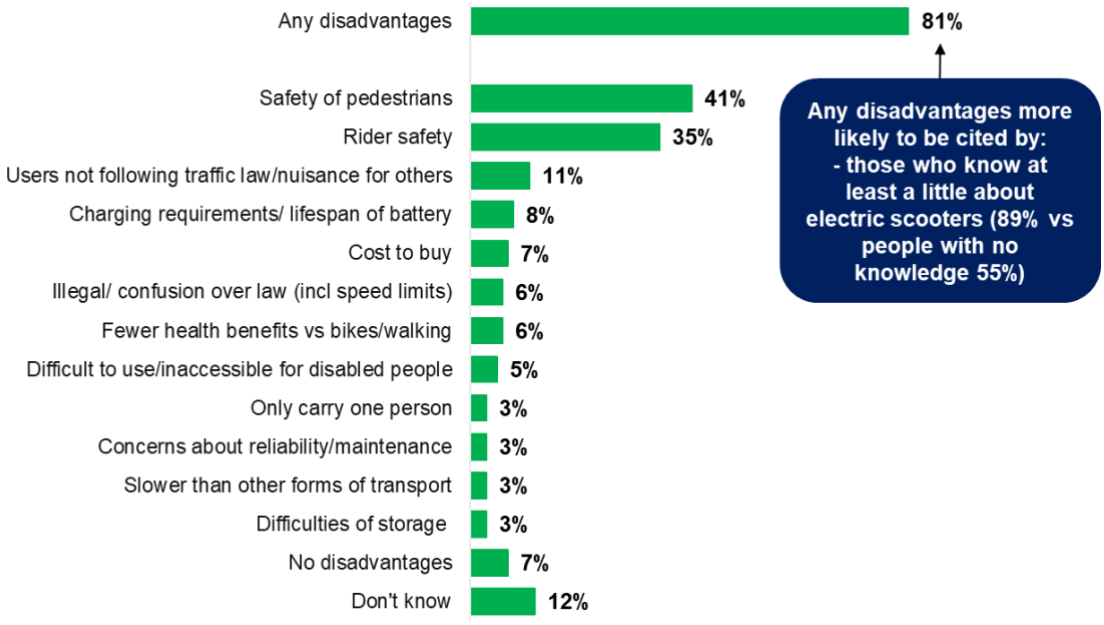
Base: All respondents (2,036). Subgroups: Men (1,004), Women (1.032); Age: 16-24 (209), 25-34 (278); 35-44 (279); 45-54 (261); 55-64 (333), 65+ (676); Urban (1,555), Rural (481); Social grade ABC1 (1,020), C2DE (1,016). This question was not filtered, however, only respondents in wave 1 of data collection were asked this question, due to it sitting in section 2 of the questionnaire.

When the results are analysed by government office region/nation, those living in the South East were significantly more likely to mention at least one advantage of e-scooters (81% versus 72% or less in other locations, with the exception of the North East (72%) and Scotland (74%)). Although the result in the South East were higher than Scotland and the North East, this difference was not statistically significant.

5.2 Perceived disadvantages of e-scooters

Figure 5.3 summarises respondents perceived disadvantages of e-scooters and shows that eight in ten respondents (81%) mentioned at least one disadvantage. Safety stood out as the main concern: the safety of pedestrians was the most commonly cited disadvantage (41%), while 35% mentioned rider safety. Overall, 53% mentioned at least one safety-related disadvantage (these included: ‘’Rider Safety’ and ‘Safety of pedestrians’). Seven per-cent could think of no disadvantages and 12% answered ‘don’t know’.

Figure 5.3 Perceived disadvantages of e-scooters, January 2020 ('Cost to hire' was not included as a pre-coded option, however, it was mentioned by 1% of respondents in total).

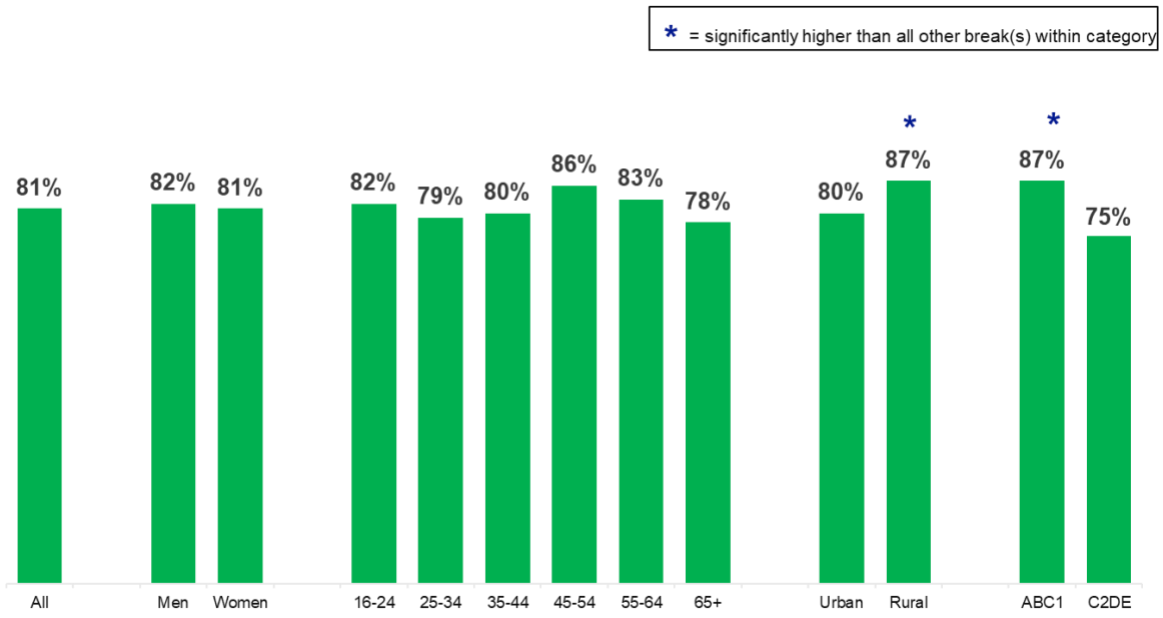


Source Q16. And what do you think are the disadvantages, if any, of electric scooters?

Base: All respondents (2,036). Subgroups: Know at least a little about electric scooters (978), no awareness of electric scooters (268). This question was not filtered, however, it was only asked of respondents who took part in wave 1, see section 2.3.1.

Focusing on the group who mentioned at least one disadvantage of e-scooters, this was more likely to be the case among those who knew at least a little about them (89% versus those who were not aware of e-scooters 55%) (Figure 5.3). Further analysis of the group citing at least one disadvantage is summarised in figure 5.4, which shows that while there were no consistent differences by gender or age, respondents in rural locations were more likely to cite at least one disadvantage 87% versus 80% in urban areas), as were those in social grades ABC1 (87% versus 75% of those in groups C2DE). However, those aged 75+ were more likely to say they didn't know when asked the question (22% versus 12% or less in other age groups).

Figure 5.4 Proportions mentioning any disadvantages of e-scooters, January 2020



Source Q16. And what do you think are the disadvantages, if any, of electric scooters?

Base: All respondents (2,036). Subgroups: Men (1,004), Women (1.032); Age: 16-24 (209), 25-34 (278); 35-44 (279); 45-54 (261); 55-64 (333), 65+ (676); Urban (1,555), Rural (481); Social grade ABC1 (1,020), C2DE (1,016). This question was not filtered, however, only respondents in wave 1 of data collection were asked this question, due to it sitting in section 2 of the questionnaire.

In terms of government office region and nation, respondents living in the South East were significantly more likely to cite at least one disadvantage (92% versus 83% or less in other regions/nations), with the exception of the North East (86%), North West (86%) and East of England (89%).

6. Perceptions of policy options

Research objective: to identify public perceptions and preferences toward different policy and regulatory measures for e-scooter users.

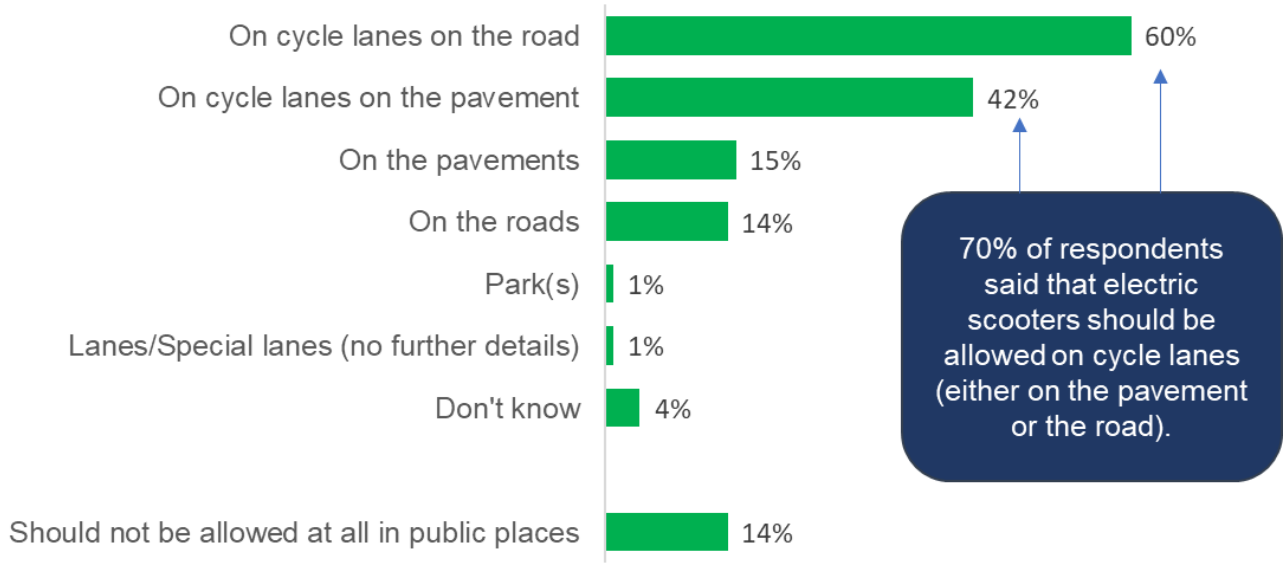
Key findings:

- Most respondents (60%) thought it should be legal to ride e-scooters in cycle lanes on the road, while 42% supported the legal use of cycle lanes on the pavement. Smaller proportions were supportive of e-scooters being allowed on pavements (15%) or the road (14%). Support for the legal use of the pavement by e-scooters was more prevalent among younger age groups.
- A minority (14%) thought that e-scooters should not be allowed in any public areas, and this was more likely among those with restricted mobility or with a disability affecting their ability to ride a bike.
- The vast majority of respondents (88%) felt it was important that helmets be made compulsory, and this was more likely to be the case among women and those living in rural areas.
- A large majority (85%) thought a maximum speed limit for e-scooters was important. Those in rural areas were more likely than urban dwellers to hold this view, as were those with a disability affecting their ability to ride a bike.
- Seven in ten respondents (71%) thought compulsory training, without the need for a test, was important. This view was more prevalent among those aged 65 and older, and among those with a disability affecting their ability to ride a bike.
- Sixty-five per-cent believed it was important that users were required to pass an official test before using an e-scooter in public, and this was more likely to be the case among those aged 65 or older, those from social class C2DE and among those with a disability that affected their ability to ride a bike.

6.1 Where should it be legal to ride e-scooters

As seen in figure 6.1, respondents were asked ‘in which of these public areas should it be legal for people to ride e-scooters?’. Six in ten (60%) respondents felt it should be legal for people to ride e-scooters on cycle lanes on the road, 42% cycle lanes on the pavement, 15% on the pavement, and 14% on the road. Overall, seven in ten (70%) respondents felt that people should be able to ride e-scooters on cycle lanes (either on the pavement or the road). Whilst 14% felt that people should not be able to ride e-scooters in public at all.

Figure 6.1 Where should it be legal to ride e-scooters, January 2020



Source Q30. In which of these public areas should it be legal for people to ride electric scooters?

Base: All respondents (2,036). This question was not filtered, however, it was only asked of respondents who took part in wave 1, see section 2.3.1.

Respondents aged over 75 were less likely to say that riders of e-scooters should be allowed in cycle lanes (either on pavements or the road) (57% versus 65% or more for younger age groups). Younger age groups were more likely to say that people should be allowed to ride e-scooters on the pavement (23% of those aged 16-24, 19% of those aged 25-34, and 18% of those aged 35-44 compared with 11% or less for all age groups above 45).

Those from white backgrounds were more likely to say that e-scooters should be allowed on cycle lanes on the road (61% versus 53% of those from BME backgrounds), and that e-scooters should be allowed on cycle lanes on the pavements (44% versus 32% of those from BME backgrounds). Whereas BME groups were more likely to say that e-scooters should be allowed on the pavement (26% versus 13% of those from white backgrounds).

Regionally, respondents from London were less likely to say that e-scooters should be allowed on cycle lanes (either on pavements or the road) (50%) than all other regions, the next lowest being Yorkshire and The Humber with 64% of respondents saying that e-scooters should be allowed on cycle lanes (either on pavements or the road).

Those living in rural areas were more likely to say that e-scooters should be allowed on both cycle lanes on the pavement or cycle lanes on the road, than those from urban areas (49% and 65% versus 40% and 59% respectively). However, respondents from urban areas were more likely to say e-scooters should be allowed on the pavements (16% versus 11% of those from rural areas).

Respondents with restricted mobility (20%) or with a disability affecting their ability to ride a bike (20%) were more likely to say that e-scooters should not be allowed at all in public areas (versus 13% for those without each).

Those who were aware of e-scooters were more likely to say that e-scooters should be allowed on cycle lanes (either on pavements or the road), than those who had not heard about them before (73% compared with 51%). They were also more likely to say that e-scooters should be allowed on pavements (16%) and on

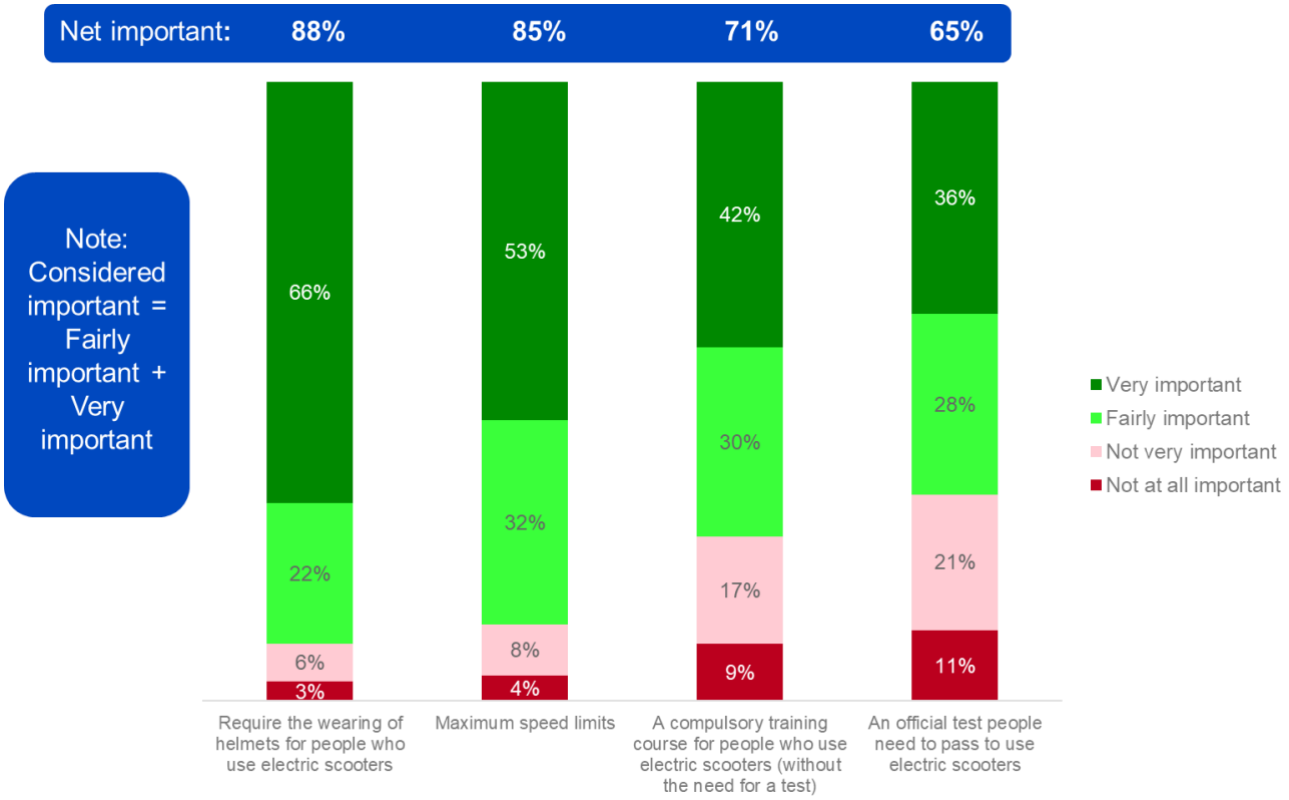
roads (14%), compared to 8% of those who had not heard about them before (for both pavements and roads).

6.2 Potential legal requirements

6.2.1 Overview of all policy options

Respondents were asked how important they thought it would be for various rules and regulations to be in place for e-scooter users. As seen in figure 6.2, wearing a helmet was considered the most important (88% felt it was important that this would be a requirement). Other rules and regulations that ranked highly included setting maximum speed limits (85%), getting users to take a compulsory training course (72%) and getting users to take an official test that they had to pass before being able to use their e-scooter in public (64%).

Figure 6.2 Perceptions on importance of different policy options, January 2020.



Source Q31. Now please imagine electric scooters are legal to use on the road in the UK, are a similar price range as bikes to buy, and are available to hire in some city and town centres in the same way as bikes are now. In your opinion, how important would each of the following be?

Base: All respondents (2,036). This question was not filtered, however, only respondents in wave 1 of data collection were asked this question, due to it sitting in section 2 of the questionnaire.

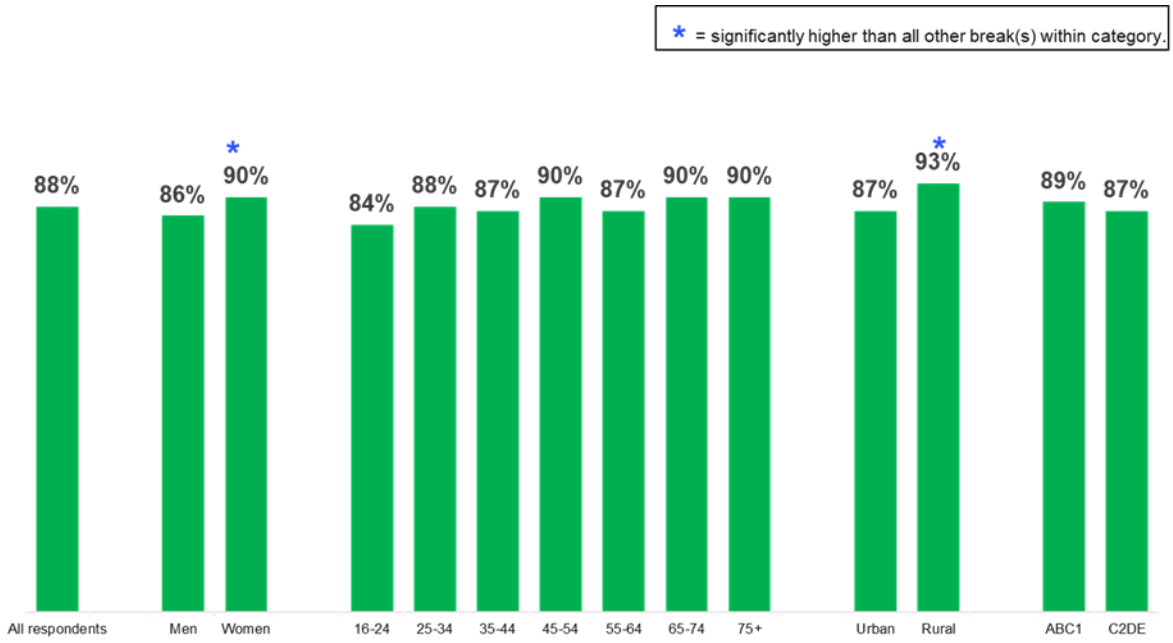
6.2.2 Importance of compulsory wearing of helmets for people who use e-scooters

As seen in figure 6.3, 88% of respondents say that it would be important to require the wearing of helmets for people who use e-scooters. Women were more likely than men to say this (90% versus 86% of men).

Those in rural areas were more likely to say this would be important than those in urban areas (93% versus 87% of those from rural areas).

Those from social grade C2DE were less likely to say this is important than those from social grade ABC1 (87% versus 89% of those in social grade ABC1).

Figure 6.3 How important would it be; to require the wearing of helmets for people who use e-scooters, January 2020



Source Q31. Now please imagine electric scooters are legal to use on the road in the UK, are a similar price range as bikes to buy, and are available to hire in some city and town centres in the same way as bikes are now. In your opinion, how important would each of the following be?

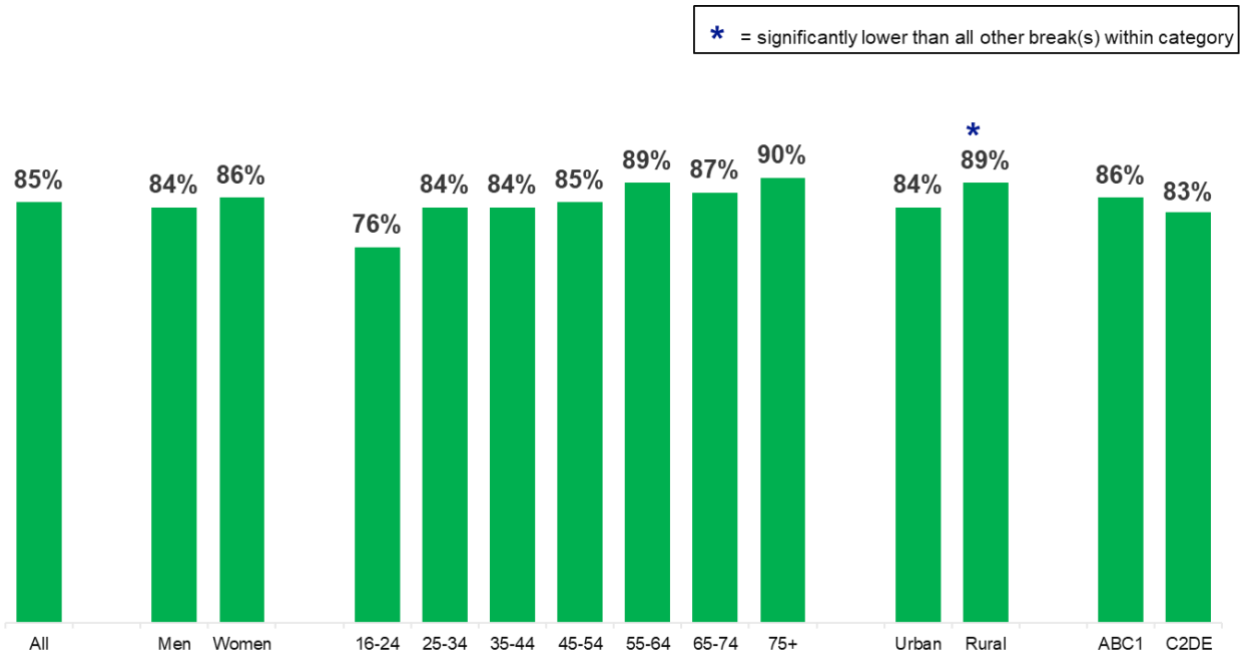
Base: All respondents (2,036). Subgroups: Men (1,004), Women (1.032); Age: 16-24 (209), 25-34 (278); 35-44 (279); 45-54 (261); 55-64 (333), 65-74 (357), 75+ (319); Urban (1,555), Rural (481); Social grade ABC1 (1,020), C2DE (1,016). This question was not filtered, however, only respondents in wave 1 of data collection were asked this question, due to it sitting in section 2 of the questionnaire.

6.2.3 Importance of maximum speed limits

As seen in figure 6.4, 85% of respondents say that it would be important to have maximum speed limits. Those in rural areas were significantly more likely to say this would be important than those in urban areas (89% vs 84%).

Respondents with a disability affecting their ability to ride a bike were significantly more likely to say that maximum speed limits were important (91% vs 84% of those without).

Figure 6.4 How important would it be; to have maximum speed limits, January 2020



Source Q31. Now please imagine electric scooters are legal to use on the road in the UK, are a similar price range as bikes to buy, and are available to hire in some city and town centres in the same way as bikes are now. In your opinion, how important would each of the following be?

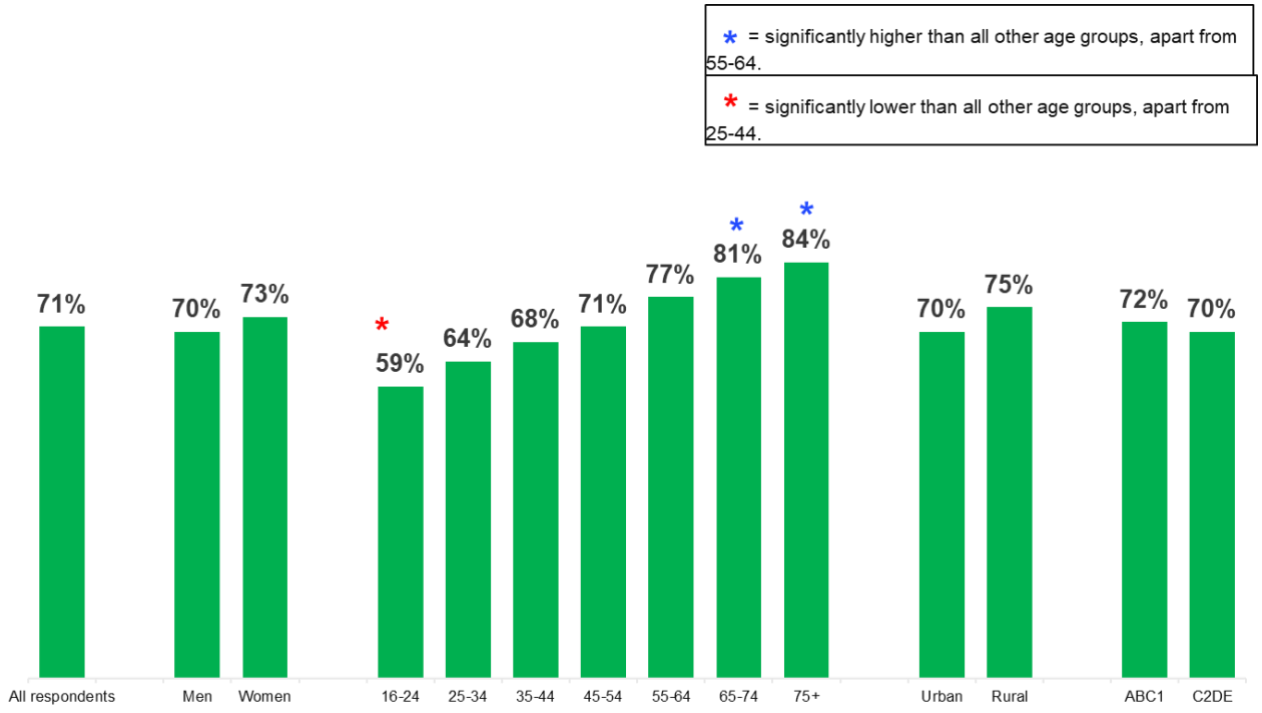
Base: All respondents (2,036). Subgroups: Men (1,004), Women (1.032); Age: 16-24 (209), 25-34 (278); 35-44 (279); 45-54 (261); 55-64 (333), 65-74 (357), 75+ (319); Urban (1,555), Rural (481); Social grade ABC1 (1,020), C2DE (1,016). This question was not filtered, however, only respondents in wave 1 of data collection were asked this question, due to it sitting in section 2 of the questionnaire.

6.2.4 Importance of a compulsory training course for people who use e-scooters (without the need for a test).

As seen in figure 6.5, around seven in ten (71%) respondents felt that it would be important to have a compulsory training course for people who use e-scooters (without the need for a test). Respondents aged over 65 or older were more likely than those under 55 to say that this would be important (82% versus 71% or less in all age groups below 55).

Respondents with a disability affecting their ability to ride a bike were more likely to say that compulsory training was important (80% versus 70% of those without).

Figure 6.5 How important would it be; to have a compulsory training course for people who use e-scooters (without the need for a test), January 2020



Source Q31. Now please imagine electric scooters are legal to use on the road in the UK, are a similar price range as bikes to buy, and are available to hire in some city and town centres in the same way as bikes are now. In your opinion, how important would each of the following be?

Base: All respondents (2,036). Subgroups: Men (1,004), Women (1.032); Age: 16-24 (209), 25-34 (278); 35-44 (279); 45-54 (261); 55-64 (333), 65-74 (357), 75+ (319); Urban (1,555), Rural (481); Social grade ABC1 (1,020), C2DE (1,016). This question was not filtered, however, only respondents in wave 1 of data collection were asked this question, due to it sitting in section 2 of the questionnaire.

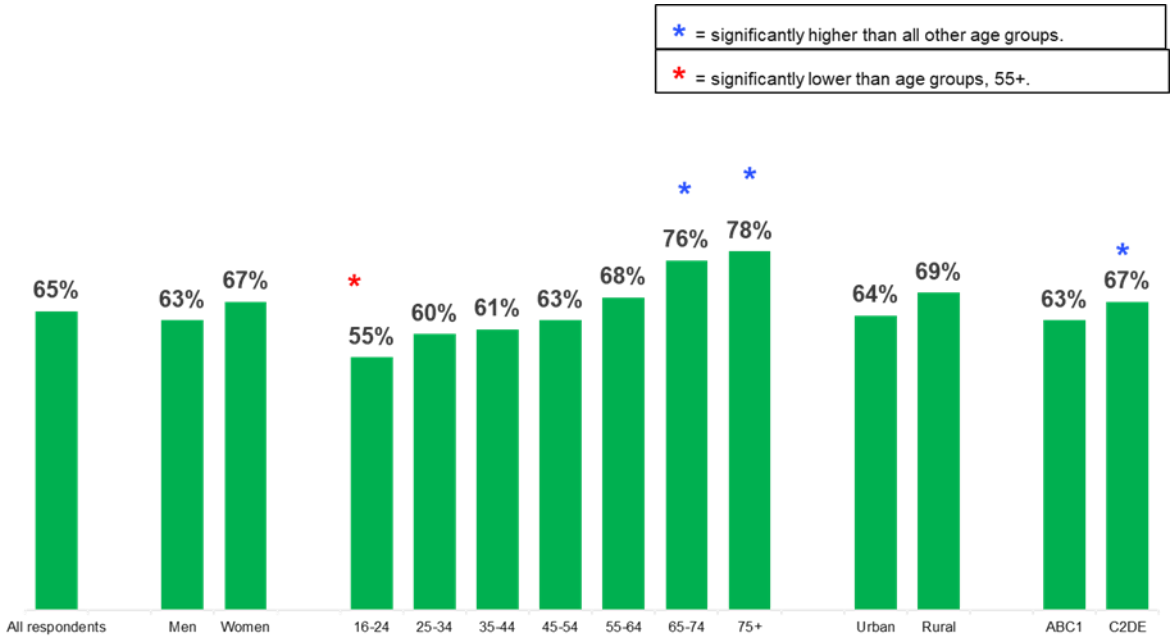
6.2.5 Importance of an official test to use e-scooters

As seen in figure 6.6, 65% of respondents say that it would be important to have an official test people need to pass to use e-scooters. Respondents aged 65 or older were more likely than all other age groups to say that this would be important (76% or higher in all age groups 65+ versus 68% or less in all age groups under 65).

Those from social class C2DE were significantly more likely to say this is important than those from social class ABC1 (67% vs 63%).

Respondents with a disability affecting their ability to ride a bike were significantly more likely to say that an official test was important (77% vs 63% of those without).

Figure 6.6 How important would it be; to have an official test people need to pass to use e-scooters, January 2020



Source Q31. Now please imagine electric scooters are legal to use on the road in the UK, are a similar price range as bikes to buy, and are available to hire in some city and town centres in the same way as bikes are now. In your opinion, how important would each of the following be?

Base: Base: All respondents (2,036). Subgroups: Men (1,004), Women (1.032); Age: 16-24 (209), 25-34 (278); 35-44 (279); 45-54 (261); 55-64 (333), 65-74 (357), 75+ (319); Urban (1,555), Rural (481); Social grade ABC1 (1,020), C2DE (1,016). This question was not filtered, however, only respondents in wave 1 of data collection were asked this question, due to it sitting in section 2 of the questionnaire.

7. Conclusions

In March 2019, the Government published the 'Future of Mobility: Urban Strategy'[1], which set out the government's plans to create an environment for innovation and investment to allow the UK to become a global leader in transport innovation. Four policy priorities were identified (known as the Future of Mobility Grand Challenge), including a commitment to a significant regulatory review which would include micromobility vehicles (namely, small mobility devices, designed to carry one or two people, for example, e-scooters and e-bikes) and the options for the testing regimes of such vehicles.

Micromobility – transport provided by very light vehicles – has been identified as one area in which regulation is currently acting as a barrier to the potential benefits of new technologies. E-scooters - plug-in electric vehicles with two, three and occasionally four wheels - are currently governed by the same rules and regulations that apply to motor vehicles, meaning that they are required to meet the standards around road tax, insurance, licence regime, etc. and technical safety outlined in the *Road Traffic Act 1988.*

As previously noted, the 'Future of mobility: Urban strategy' outlined the need for new evidence to understand public perceptions of current and future e-scooter use in the UK. At the time of commissioning, there was a relative lack of research in the UK around public perceptions of, preferences for and use of e-scooters, and therefore a nationally representative survey was required to set a baseline of understanding.

The overall purpose of the survey was to provide insight to inform the future policy direction for e-scooters, with the following specific research objectives:

1. **Awareness of e-scooters amongst the general public & current usage of electric scooters**: Understand awareness of e-scooters and identify frequency and purpose of e-scooter use.
2. **Potential future users of e-scooters**: Understand the likelihood of buying and/or hiring e-scooters, and reasons underlying their future use.
3. **Perceived advantages and disadvantages of e-scooters**: Identify the perceived advantages and disadvantages associated with e-scooters, and potential barriers to their adoption.
4. **Perceptions of policy options**: Identify public perceptions and preferences toward different policy and regulatory measures for e-scooter users.
5. **Subgroup differences**: Within each of the previous objectives, delineate how views differ across different socio-demographic sub-groups.

7.1 Awareness and use of e-scooters

- In summary, the research showed a moderate level of knowledge of e-scooters, with half of respondents claiming to have some degree of knowledge (within this, 15% knew a lot or a fair amount while 38% knew a little). Reported levels of knowledge of e-scooters were higher among males, younger respondents, those living in urban areas, and those from higher social grades.

[1] https://www.gov.uk/government/publications/future-of-mobility-urban-strategy

In summary, at the start of 2020, the vast majority of respondents (90%) had heard of e-scooters however *knowledge* was, at best, modest. Only 15% claimed they knew a lot or a fair amount about e-scooters while around half (47%) said they knew nothing or hardly anything at all.

During the same time period, usage of e-scooters was very low, only 7% of respondents claimed to have ever used an e-scooter either in the UK or elsewhere. Ownership was also low, just 18% of those who had ever used an e-scooter owned one.

7.2 Potential users of e-scooters

Likely take up levels of e-scooters were modest: around a tenth (9%) said they would be likely to buy an e-scooter (if legal to use and priced in a similar range to bikes), while a slightly larger proportion (15%) said they would be likely to hire an e-scooter in a town/city centre in the UK if this service were available.

The majority of respondents (77%) who said they would hire or buy an e-scooter intended to use it to reach a specific destination and most (82%) would use an e-scooter to replace or reduce their use of at least one mode of transport, with walking being the most commonly cited mode (39%).

7.3 Perceived advantages and disadvantages of e-scooters

Most respondents (69%) were able to see at least one advantage of e-scooters, with the most commonly mentioned advantages being: the low pollution status and environmental credentials (24%), speed (16%), the fun of riding (13%), convenience for short journeys (12%), ease of use (12%). However, eight in ten (81%) respondents were able to think of at least one disadvantage, with the safety of pedestrians (41%) and riders (35%) being top of mind concerns.

7.4 Perceptions of policy options

Looking towards regulatory measures, and in particular, *where* it should be legal to use an e-scooter, the greatest support was for the use of e-scooters on cycle lanes on the road (60%), while 42% thought e-scooters were suited to cycle lanes on pavements. Much smaller proportions were in favour of e-scooters being used on roads in general (15%) or on pavements (14%), and a minority (14%) were against the use of e-scooters at all in public areas.

In terms of other regulatory considerations, there was a high degree of support for conditions surrounding the use of e-scooters. The most commonly supported measure was the compulsory use of helmets (88%), followed by a maximum speed limit (85%) and compulsory training for e-scooter users without the need for a formal test (71%). In addition, two thirds (65%) wanted users to pass an official test before being able to use an e-scooter in public.

7.5 Subgroup findings

As a broad overview, knowledge of e-scooters was greatest among the following sub-groups: young respondents, male respondents, urban dwelling respondents, and those in higher socio-economic groups, while use of e-scooters was higher among men and those aged 16-24. Predictably, higher levels of knowledge and/or experience of using an e-scooter resulted in a greater tendency to express an opinion regarding the pros and cons of e-scooters, as well as greater likelihood to buy or hire one in the future. However, it is important to bear in mind that at the time of the survey, nearly half of respondents reported *knowing nothing or hardly anything* about e-scooters.

Caution around the regulations for e-scooters varied by demographic group, for example, those with restricted mobility or a disability that affected their ability to ride a bike were least likely to support e-scooter use in public areas. Older respondents and those with a disability affecting their ability to ride a bike were more likely to want e-scooter users to undertake compulsory training and/or to pass an official test before being allowed to ride the e-scooter in public places. Notably rural dwellers were more likely than those in urban areas to be in support of compulsory helmet use and maximum speed limits for e-scooters.

It should be noted that the survey was conducted *before* the implementation of regulatory changes to accommodate e-scooter trials in the UK. These findings therefore serve as a baseline measure of the views of adults aged 16 and over in Great Britain at the start of 2020 prior to new regulations for e-scooters being established for testing purposes.

Following on from this research, Kantar was commissioned to carry out qualitative research to build upon the findings of this quantitative study. The qualitative research consisted of three week-long online communities and a number of in-depth telephone interviews. This research took place between 25th March and 3rd June 2020. The qualitative study aimed to unpick people's perceptions of e-scooters, particularly relating to:

- Existing attitudes towards e-scooters and the underlying drivers of these
- How, where and why people are most likely to use e-scooters
- Concerns around e-scooters, especially regarding safety and safe use of e-scooters
- Delineating how views differ across different groups of non-users and users

Appendix A: Sample and survey methodology

Overview of survey methodology

Survey fieldwork was conducted on the Kantar UK face-to-face omnibus, a weekly omnibus survey. The omnibus survey is conducted through random location sampling, a high-quality form of quota sampling in which sampling points are allocated through a random selection. Respondents in each interviewer assignment are drawn from a small set of homogenous streets, thus giving interviewers very little choice in the selection of respondents. Quotas are set on characteristics which are known to have a bearing on individuals' probabilities of being at home and so available for interview. These characteristics are broken down by gender. For females the presence of children and working status is set, and for males working status is set. This minimises any selection bias introduced because of interviewers focusing on groups that are more likely to be at home. Rules are also in place that govern the spacing between addresses and the timing of interviews. Firstly, interviewers must leave 3 doors between each successful interview. Further to this, interviewing takes place between 2pm and 8pm to ensure that potential respondents who are not at home during the day can still be interviewed.

Census small area statistics and the Postcode Address File (PAF) are used to define sampling points. Sampling points are areas of similar population sizes formed by the combination of wards, with the constraint that each point must be contained with a single Government Office Region (GOR).

The addresses are issued to achieve an adult sample of between 13 and 18 interviews in provincial areas and 12 and 15 in London. Assignments are conducted over two days of fieldwork and carried out on weekdays between 2pm and 8pm and at the weekend. Interviews are conducted by computer assisted personal interviewing (CAPI). Approximately 2,000 UK interviews are conducted with adults aged 16+ on the omnibus each week. To achieve the required sample size in England, fieldwork for this research was conducted during two weeks of the omnibus survey for each wave. Fieldwork took place between 21st January-3rd February.

Overview of Questionnaire Development

Prior to conducting the survey, DfT and Kantar Public jointly designed the questionnaire. This process involved multiple stages including:

- a formal desk review of proposed questions using Kantar's Questionnaire Appraisal Framework (QAF), to review questions asked on other surveys for relevance and applicability to this research and to inform the development of new questions.
- Cognitive testing of the draft questionnaire, which provided an in-depth test of the survey questions prior to main stage fieldwork.

Achieved sample profile and weighting

A total sample of 4,046 surveys were collected during fieldwork. The achieved sample at each wave is representative of individuals aged 16 or over living in Great Britain. Data was also weighted to match the profile of the population in terms of age, gender, region, ONS rural/urban classification, working status,

ethnicity, number of cars/vans in household, whether the individual has a driving licence, housing tenure and highest qualification (for those aged 18-69).

The achieved sample profile is outlined in the following tables.

Figure A.1. Sample profile[2]

Category		Achieved	Unweighted	Weighted	Difference
Gender	Male	1999	49.4	48.9	+0.5
	Female	2047	50.6	51.1	-0.5
Age	16-24	441	10.9	13.3	-2.4
	25-34	617	15.2	16.7	-1.5
	35-44	574	14.2	15.5	-1.3
	45-54	550	13.6	17.0	-3.4
	55-64	633	15.6	14.8	+0.8
	65-74	672	16.6	12.4	+4.2
	75+	559	13.8	10.3	+3.5
Region (GOR)	North East	175	4.3	4.2	+0.1
	North West	418	10.3	11.3	-1.0
	Yorkshire and the Humber	326	8.1	8.5	-0.4
	East Midlands	289	7.1	7.5	-0.4
	West Midlands	377	9.3	9.1	+0.2
	East of England	296	7.3	9.5	-2.2
	London	537	13.3	13.5	-0.2
	South East	550	13.6	14.0	-0.4
	South West	338	8.4	8.8	-0.4
	Scotland	510	12.6	8.6	+4.0
	Wales	223	5.5	4.9	+0.6
Urbanity (ONS classification)	Urban	3,173	78.4	81.3	-2.9
	Rural	866	21.4	18.7	+2.7
Working status	Full time	1,367	33.8	45.5	-11.7
	Part time	517	12.8	16.0	-3.2
	Retired	1315	32.5	21.5	+11.0
	In education	251	6.2	3.9	+2.3
	Not working	596	14.7	13.2	+1.5
Ethnicity	White	3,540	87.5	87.3	+0.2
	Minority ethnic	442	10.9	12.7	-1.8

[2] The sample profile contains all the demographic characteristics that the data was weighted towards

Appendix B: Full questionnaire

QS1039 ESCOOTERS
WED 04
ALL ADULTS 16+ IN GB

NOTES:

• ALL PROMPTED QUESTIONS ARE INVERTED UNLESS SPECIFIED (1\2 SEE LIST 1-10 & OTHER 1\2 SEE LIST 10-1)
• DK\None – THESE CODES WILL APPEAR OFF SCREEN AT THE BOTTOM – INTERVIEWERS WILL SCROLL DOWN TO CODE THESE
• OTHER\ DK\None\Prefer not to say –THE SCRIPTERS ASSIGN THESE AS HIGH CODES 96,97,98,99 WHICH ARE STANDARD FOR US
• EACH QUESTION IS SCRIPTED WITH ITS FILTER ABOVE
• IF A QUESTION DOESN'T HAVE A MULTI CHOICE TEXT ABOVE IT, IT WILL BE SINGLE CHOICE. INTERVIEWERS DO NOT NEED TO HAVE THIS INSTRUCTION ADDED
• ALL STATEMENT QUESTIONS WILL HAVE ONE STATEMENT PER SCREEN
• ALL STATEMENT QUESTIONS UNLESS SPECIFIED WILL BE RANDOMISED
• ALL QUESTIONS ARE READ OUT AND IF PROMPTED THE ANSWERS ARE SHOWN ON SCREEN (THEY ARE NOT READ OUT)
• THROUGHOUT \ HAVE BEEN REPLACED WITH \ AS NIPO DOESN'T LIKE FORWARD SLASHES

FILTERS:

F1: All GB Adults
F2: All aware of electric scooters - Q1\2,3,4,5
F3: All aware of electric scooters and not currently use them – Q2\3
F4: All who have used an electric scooter previously – Q2\1
F5 = All who have ever used an electric scooter previously - Q2\1,2 or Q3\1
F6 = All who regularly or occasionally use an electric scooter in the UK - Q5\1
F7 = All who have used an electric scooter in the UK but don't own one - Q5\1 and Q7\2
F8 = All who use an electric scooter for journeys to a specific destination - Q9\1,2,3
F9 = All who use electric scooter last time to get to work, School, college, uni or another specific destination - Q10\1,2,3
F10 = All likely to buy or hire an electric scooter - Q17\1,2 or Q18\1,2
F11 = All who have given a purpose Q20\1,2,3,4,5
F12 = All who would use electric scooter to get to work, School, college, uni or another specific destination as their main reason - Q21\1,2,3 or if only 1 answer selected at Q20 Q20\1,2,3
F13 = All who would reduce or stop using [INSERT] and use an e scooter instead - Q28\1-6 - ASKED FOR EACH
F14 = All agreeing to be re-contacted – Q35\1

F15 = All who have used an electric scooter both in and outside the UK = Q5\1&2
F16 = All who do not own an electric scooter – Q7 <> 1

F1: All GB Adults
SHOW SCREEN
EScoKnow. Q.1 An electric or motorized scooter is a stand-up scooter with a small engine or electric motor. How much, if anything, would you say you know about electric scooters?

1: Hadn't heard about them before now
2: Hardly anything but I've heard of them
3: A little
4: A fair amount
5: A lot
99: Don't know

F2: All aware of electric scooters - Q1\2,3,4,5
SHOW SCREEN
EScoUse. Q.2 Do you personally use an electric scooter?

1: Yes, regularly
2: Yes, occasionally
3: No
99: Don't Know

F3: All aware of electric scooters and not currently using them – Q2\3
SHOW SCREEN

EScoEvUse. Q.3 Have you ever used an electric scooter? To clarify, this does not include Segways or hoverboards.

1: Yes
2: No
99: Don't Know

F4: All who have used an electric scooter previously – Q3\1
SHOW SCREEN
EScoLast. Q.4 When did you last use an electric scooter?

1: Within the last year
2: 1-2 years ago
3: Longer ago than 2 years
99: Don't Know

F5 = All who have ever used an electric scooter previously - Q2\1,2 or Q3\1
SHOW SCREEN – MULTI CHOICE
EScoWhere. Q.5 Where have you used an electric scooter?

1: In the UK
2: Outside the UK
99: Don't Know

F15 = All who have used an electric scooter both in and outside the UK - Q5\1&2
SCRIPTING – INSERT TEXT ITEM:

For the next questions, please only think about times you have used electric scooters **in the UK**.

F6 = All who have used an e-scooter/electric scooter in the UK –– (Q2\1 or 2 OR Q3\1) & Q5\1
SHOW SCREEN
EScoFreq. Q.6 About how frequently do you use an electric scooter?

1: Every day (7 days a week)
2: Most days (4-6 days a week
3: 1-3 days a week
4: 1-3 times a month
5: 3-4 times a year
6: Once or twice a year
7: Less often\not at all
99: Don't Know

F6 = All who have ever used an electric scooter in the UK – (Q2\1 or 2 OR Q3\1) & Q5\1
SHOW SCREEN
EScoOwn. Q.7 Do you own an electric scooter?

1: Yes
2: No
99: Don't Know

F7 = All who have used an electric scooter in the UK but don't own one - Q5\1 and Q7\2
SHOW SCREEN – MULTI CHOICE

EScoWays. Q.8 In which of these ways have you used an electric scooter?

1: Paid to hire one
2: Borrowed one (without paying to use it)
3: Other way (WRITE IN)
99: Don't Know

F6 = All who regularly or occasionally use an electric scooter in the UK – Q2\1,2 & Q5\1
SHOW SCREEN – MULTI CHOICE

EScoPurp. Q.9 For which of these purposes have you used an electric scooter?

1: To get to **work**
2: To get to **school/college/university**
3: To get to other destinations (e.g. local shops, gym, restaurants, friends or relatives houses)
4: Just for **fun** rather than to get to a destination
5: Other (WRITE IN)
99: Don't Know

F8 = All who use an electric scooter for journeys to a specific destination Q9\1,2,3
SHOW SCREEN

EScoLast. Q.10 Thinking about the last time you used an electric scooter, what was your main purpose for using it?

1: To get to **work**
2: To get to **school/college/university**
3: To get to another destination (e.g. local shops, gym, restaurant, friends or relatives houses)
4: Just for **fun** rather than to get to a destination
5: Other (WRITE IN)
99: Don't Know

F9 = All who use electric scooter last time to get to work, School, college, uni or another specific destination - Q10\1,2,3
SHOW SCREEN

EScoJour. Q.11 Still thinking about the last time you used an electric scooter, did you use an electric scooter to get **all the way to your destination** or did you also use another type of transport, for example a bus or a train?

1: Used an electric scooter to get all the way there
2: Used another type of transport as well as an electric scooter
99: Don't know

F6 = All who regularly or occasionally use an electric scooter in the UK - Q2\1,2 & Q5\1
SHOW SCREEN – MULTI CHOICE

EScoStop. Q.12 Has your use of an electric scooter meant that you have cut down or stopped using any of these types of travel?

1: Car or van
2: Train/tube/tram/metro/light rail
3: Bus
4: Bicycle (including electric bikes)
5: Taxi

6: Walking
7: Other (WRITE IN)
98: None of these [SINGLE CODE]
99: Don't Know

F6 = All who regularly or occasionally use an electric scooter in the UK - Q2\1,2 & Q5\1
SHOW SCREEN – MULTI CHOICE

EScoInc. Q.13 Some people use an electric scooter as part of a journey involving different forms of travel. Has your use of an electric scooter meant that you have increased or started using any of these types of travel?

1: Car or van
2: Train/tube/tram/metro/light rail
3: Bus
4: Bicycle (including electric bikes)
5: Taxi
6: Walking
7: Other (WRITE IN)
98: None of these [SINGLE CODE]
99: Don't Know

FX = All who regularly or occasionally use an electric scooter in the UK - Q2\1 or 2 & Q5\1

EScoWhy. Q.14 Why did you start using electric scooters?

OPEN ENDED - WRITE IN

F1: All GB Adults

DO NOT SHOW SCREEN UNTIL INSTRUCTED OTHERWISE

F1: All GB Adults
DO NOT SHOW SCREEN – MULTI CHOICE

EScoAdv. Q.15 What do you think are the advantages, if any, of electric scooters?

INTERVIEWER: IF RESPONDENT SAYS 'CONVENIENT'/'GOOD' PROBE IN WHAT WAY

1: Good for people who can't travel (far) by foot/bike

2: Easy to use/learn/little effort required
3: Speed
4: Easier to use than standard scooters (can travel longer distances/easier going up hills)
5: Reduces pollution/better for environment
6: Fun to ride
7: Easy to store/secure/carry/small (compared to a bike)/foldable/portable
8: Reduces congestion (relative to cars)/smaller than a car
9: Safer roads (e.g. if more people are out of cars)
10: Able to travel in more places (than cars/bikes)
11: Cost
12: Easy/convenient for short journeys/to get from A to B
13: Appearance/fashionable
14: Other (WRITE IN)
98: No advantages [SINGLE CODE]
99: Don't know

F1: All GB Adults
DO NOT SHOW SCREEN – MULTI CHOICE

EScoDis. Q.16 And what do you think are the disadvantages, if any, of electric scooters?

1: Weight
2: Cost to buy
3: Difficult to use/inaccessible for some disabled people
4: Rider safety
5: Safety of pedestrians
6: Users not following traffic law/nuisance for other road users/pedestrians
7: The need to charge/charging times/range/reliance on a battery//length or lifespan of the battery
8: Illegal/confusion over rules of road/law/speed limits
9: Fewer health benefits (than bikes/walking)
10: Appearance
11: Only carries one person
12: General concerns over reliability/maintenance needs
13: Slower than other forms or transport/would take too long to get to places
14: Difficulties with storage (at home or when travelling)
15: Other (specify)
98: No disadvantages [SINGLE CODE]
99: Don't know

F1: All GB Adults
Now please imagine electric scooters are legal to use on the road in the UK, are a similar price range as bikes to buy, and are available to hire in some city and town centres in the same way as bikes are now.

F16 = All who do not own an electric scooter – Q7 <> 1
SHOW SCREEN

EScoFutBuy. Q.17 In this scenario, how likely would you be to **buy** your own electric scooter?

1: Very likely
2: Quite likely
3: Not very likely
4: Not at all likely
99: Don't Know

F1: All GB Adults
SHOW SCREEN

EScoFutHire. Q.18 In this scenario, if they were available, how likely would you be to **hire** an electric scooter in a city or town centre in the UK?

1: Very likely
2: Quite likely
3: Not very likely
4: Not at all likely
99: Don't Know / It depends

F10 = All likely to buy or hire an electric scooter - Q17\1,2 or Q18\1,2
SHOW SCREEN

EScoFutReq. Q.19
(IF Q17 = 1 or 2): Now imagine you have bought an electric scooter.
(IF Q17 = 3 or 4 or 5) and (Q18 = 1 or 2): Now imagine you were able to hire an electric scooter in a city or town centre in the UK.

In this scenario, how frequently do you think you might use an electric scooter?

1: Every day (7 days a week)
2: Most days (4-6 days a week)
3: 1-3 days a week
4: 1-3 times a month
5: 3-4 times a year
6: Once or twice a year
7: Less often\not at all
99: Don't know

F10 = All likely to buy or hire an electric scooter - Q17\1,2 or Q18\1,2
SHOW SCREEN – MULTI CHOICE

EScoFutPurp. Q.20 Still imagining you
IF (Q17 = 1 or 2): have bought
IF (Q17 = 3 or 4 or 5) and (Q18 = 1 or 2): could hire
an electric scooter, for what purposes do you think you might use an electric scooter?

1: To get to **work**
2: To get to **school/college/university**
3: To get to other destinations (e.g. local shops, gym, restaurants, friends or relatives houses)
4: Just for **fun** rather than to get to a destination
5: Other (specify)
99: Don't Know

F11 = All who have given more than one purpose Q20\1,2,3,4,5
SHOW SCREEN

EScoFutMPurp. Q21. Which of these do you think would be your **main** purpose for using an electric scooter?

1: To get to **work**
2: To get to **school/college/university**
3: To get to other destinations (e.g. local shops, gym, restaurants, friends or relatives houses)
4: Just for **fun** rather than to get to a destination
5: Other (specify)
99: Don't Know

F12 = All who would use electric scooter to get to work, School, college, uni or another specific destination as their main reason Q21\1,2,3 or if only one answer selected at Q20 Q20\1,2,3
SHOW SCREEN

EScoFutJour. Q.22 Would you use an electric scooter to get **all the way to your destination** or would you also use another type of transport, for example a bus or a train?

1: Would use an electric scooter to get all the way there
2: Would use another type of transport as well as an electric scooter
99: Don't know

F1: All GB Adults
The next few questions ask how frequently you travel by other forms of transport. Please only include travel in the UK.

F1: All GB Adults
SHOW SCREEN

BusFreq. Q.23 About how frequently do you travel by bus?

1: Every day (7 days a week)
2: Most days (4-6 days a week)
3: 1-3 days a week
4: 1-3 times a month
5: 3-4 times a year
6: Once or twice a year
7: Less often\not at all
99: Don’t know

F1: All GB Adults
SHOW SCREEN

TrainFreq. Q.24 About how frequently do you travel by train, tube, tram, metro or light rail?

1: Every day (7 days a week)
2: Most days (4-6 days a week)
3: 1-3 days a week
4: 1-3 times a month
5: 3-4 times a year
6: Once or twice a year
7: Less often\not at all
99: Don’t know

F1: All GB Adults
SHOW SCREEN

BikeFreq. Q.25 About how frequently do you use a bicycle?

INTERVIEWER: EXCLUDE EXERCISE BIKES

1: Every day (7 days a week)
2: Most days (4-6 days a week)
3: 1-3 days a week
4: 1-3 times a month
5: 3-4 times a year
6: Once or twice a year
7: Less often\not at all
99: Don’t know
F1: All GB Adults
SHOW SCREEN

TaxiFreq. Q.26 About how frequently do you travel by taxi? Please include Uber and other app-based minicab services.

1: Every day (7 days a week)
2: Most days (4-6 days a week)
3: 1-3 days a week
4: 1-3 times a month
5: 3-4 times a year

6: Once or twice a year
7: Less often\not at all
99: Don’t know

F1: All GB Adults
SHOW SCREEN

CarFreq. Q.27 Excluding taxi journeys, about how frequently do you travel by car or van, whether as a driver or passenger?

1: Every day (7 days a week)
2: Most days (4-6 days a week)
3: 1-3 days a week
4: 1-3 times a month
5: 3-4 times a year
6: Once or twice a year
7: Less often\not at all
99: Don’t know

F10 = All likely to buy or hire an electric scooter - Q17\1,2 or Q18\1,2
SHOW SCREEN – MULTI CHOICE

EscoTravMod. Q.28 Which, if any, of these ways of travelling would you reduce or stop using and instead use an electric scooter?

1: Car or van [SHOW IF Q27=1-6]
2: Train/tube/tram/metro/light rail [SHOW IF Q24=1-6]
3: Bus [SHOW IF Q23=1-6]
4: Bicycle (including electric bikes) [SHOW IF Q25=1-6]
5: Taxi [SHOW IF Q26=1-6]
6: On foot/Walking
7: Other (TYPE IN)
98: None of these [SINGLE CODE]
99: Don’t Know

F13 = All who would reduce or stop using [INSERT] and use an e scooter instead - Q28\1-6 - ASKED FOR EACH

EScoTravRed. Q.29 Would you use an electric scooter instead for **all** or **some** journeys you currently make [INSERT TRAVEL MODE]?

TRAVEL MODE:
IF Q28\1 = ‘by car or van’
IF Q28\2 = ‘by train, tube, tram, metro, light rail’
IF Q28\3 = ‘by bus’
IF Q28\4 = ‘by bicycle’
IF Q28\5 = ‘by taxi’
IF Q28\6 = ‘on foot’

1: Yes, I would use an electric scooter instead for **all** journeys made [INSERT TRAVEL MODE]
2: Yes, I would use an electric scooter instead for **some** journeys made [INSERT TRAVEL MODE]
3: No, I would not replace any journeys made [INSERT TRAVEL MODE] with an electric scooter
99: Don’t Know

F1: All GB Adults
SHOW SCREEN – MULTI CHOICE

EScoAllow. Q.30 The next two questions are about your opinions on how electric scooters should be used in the UK.

Firstly, in your opinion, in which of these public areas should it be legal for people to ride electric scooters?

1: On the roads
2: On the pavements
3: On cycle lanes on the road
4: On cycle lanes on the pavement (IF NECESSARY: This is a section of the pavement marked out for cyclists only)
5: Somewhere else (WRITE IN)
6: Should not be allowed at all in public areas [SINGLE CODE]
99: Don't know

F1: All GB Adults
SHOW SCREEN – READ OUT

EScoImp. Q.31 Now please imagine electric scooters are legal to use on the road in the UK, are a similar price range as bikes to buy, and are available to hire in some city and town centres in the same way as bikes are now. In your opinion, how important would each of the following be?

F1: All GB Adults
SHOW SCREEN

STATEMENTS:
A. A compulsory training course for people who use electric scooters (without a test)?
B. An official test people need to pass to use electric scooters?
C. Require the wearing of helmets for people who use electric scooters?
D. Maximum speed limits?

1: Very important
2: Fairly important
3: Not very important
4: Not at all important
99: Don't Know

F1: All GB Adults
SHOW SCREEN

(Internet). Q32. How often do you access the internet? Please include internet access from any device including smartphones.

1: More than once a day
2: Once a day
3: 4-6 times per week
4: 2-3 times per week
5: About once a week
6: About once a fortnight
7: About once a month
8: About once every 2-3 months
9: About once every six months
10: Less often\Never
99: Don't know

F1: All GB Adults

SHOW SCREEN-MULTI CHOICE

Q.50 (B2): Q.33 Do you have any disability or other long-standing health problem that makes it difficult for you to do any of the following...

1: Go out on foot
2: Use local buses
3: Get in or out of a car
98: None of these – MUTUALLY EXCLUSIVE

F1: All GB Adults
SHOW SCREEN

Q.51 (B39b): Q.34 Do you have any disability or other long-standing health problem that makes it, or would make it, difficult or impossible for you to ride a bicycle?

1: Yes – impossible
2: Yes – difficult
3: No
99: Don’t know

F1: All GB Adults
SHOW SCREEN

Q.35 This survey is conducted by Kantar, an independent social research organisation. We may like to contact you again, with questions relating to this survey or to help with other connected research for the Department for Transport. Would it be okay for us to contact you within the next 12 months?

This will involve us keeping a secure record of your name and telephone number for 12 months. Your contact details will not be used for any other purposes and will be destroyed after 12 months. If you answer 'yes', you are giving your permission for us to re-contact you within the next 12 months to discuss taking part in follow-up research for the Department for Transport. You are not agreeing to take part in any research.

1: Yes
2: No

F14 = All agreeing to be re-contacted – Q35\1
SHOW SCREEN

Q.36 If follow up research related to this survey was being conducted on behalf of the Department for Transport would you be willing for Kantar to securely pass your name, contact details and information from this survey to another research organisation, so they could contact you within the next 12 months?

This will involve us keeping a secure record of your name, email address and/or telephone number for two years. Your contact details will only be shared for valid research purposes and will be destroyed after 12 months.

If you answer ‘yes’, you are giving your permission to be re-contacted to discuss taking part in follow-up research, for the Department for Transport within the next 12 months by another research organisation. You are not agreeing to take part in any research.

1: Yes
2: No

F14 = All agreeing to be re-contacted – Q35\1

Q.37 Please enter your telephone number in case we want to contact you for any follow up research.

ENTER TELEPHONE NUMBER: _____