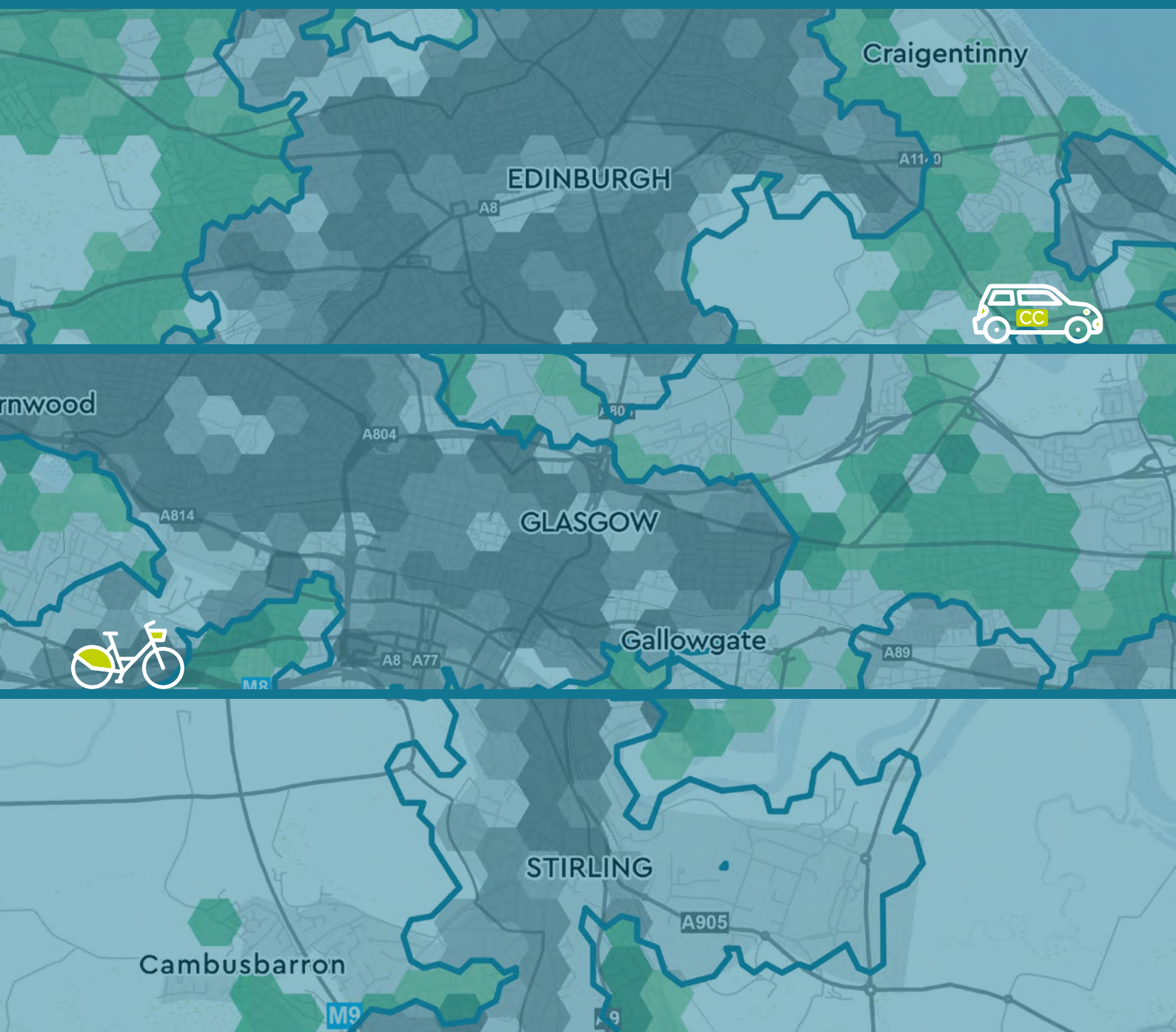


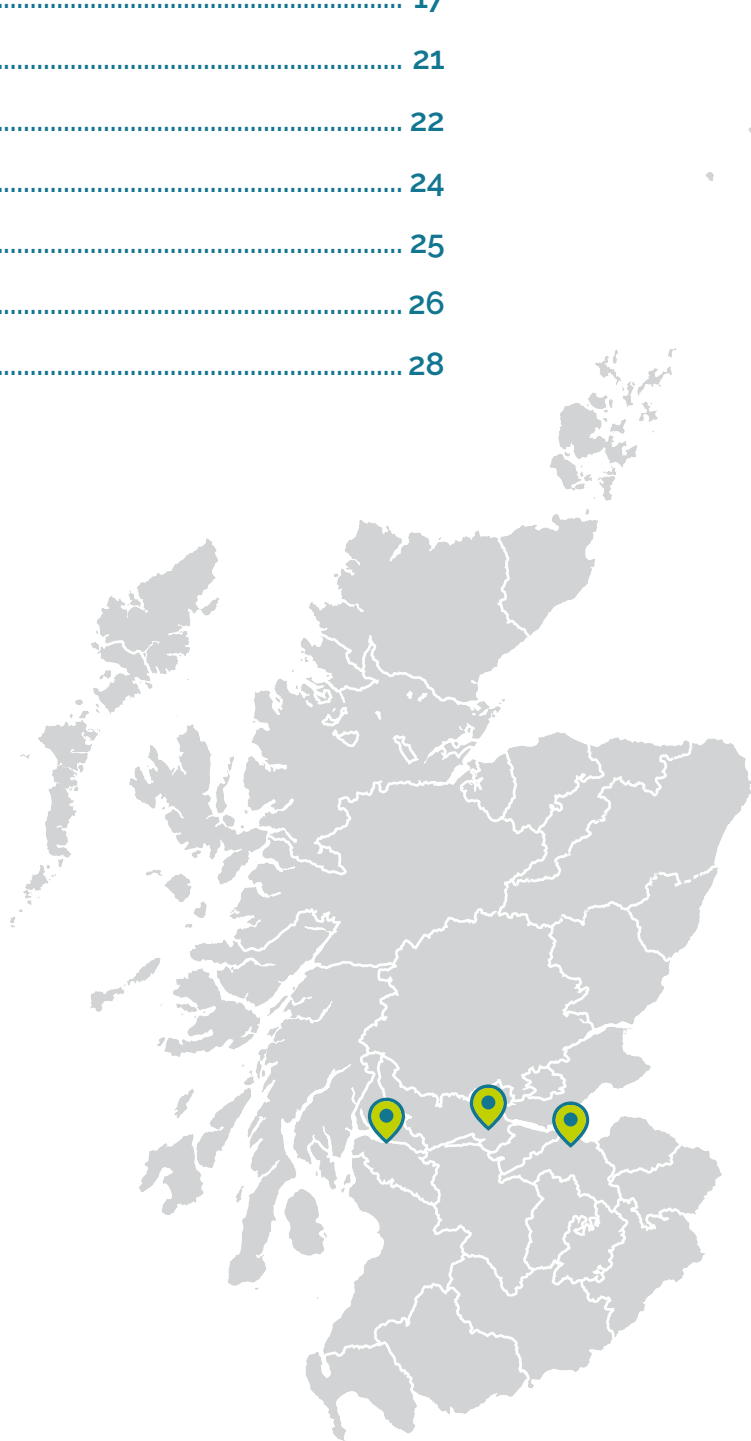
Understanding users and non-users of shared transport in Scotland

January 2023



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This report explores the car club and public bike share schemes operating in the Scottish cities of **Glasgow, Stirling** and **Edinburgh**

Introduction

Use of shared transport has risen over the last decade, with our research finding an increase of 24% in car club memberships last year alone. Yet much more progress is possible and indeed necessary if we are to achieve the ambitious climate and transport goals set out at international, UK and Scottish levels.

CoMoUK is the national organisation for shared transport, a charity for promoting its social, economic and environmental benefits. We work with national, regional, transport and local authorities as well as the private sector to further these public benefits; a truly collaboratively task which is something of a theme for this report.

The ability of shared transport to support society's move to a more sustainable future has been well documented by our organisation through over ten years of research into the impact of car clubs and bike share schemes.

While year upon year we consistently see an increase in membership and scheme usage where services remain in place, the potential that shared transport has to effect more meaningful change is limited by two key factors. The ability for services to be made available to prime users without provision and the need to address barriers to adoption from non-users.



OVO Bikes (nextbike), Glasgow

Working with consultants WSP and Paul Bristow of MTC, CoMoUK has set out to understand more about users, non-users and the barriers faced to the spread of car clubs and bike share in Scotland.



Left: Enterprise Car Club, Edinburgh

Right: Santander Cycles (nextbike), Stirling

Methodology

This report has four focuses:

1. Identifying likely users and non-users by demographic group, using Mosaic classification

In order to identify users, the Mosaic socio-demographic classification system was used to segment the population of Scotland. The system, created by Experian the data analytics and consumer credit reporting company, was designed to provide a view of citizens and their needs by categorising them by demographic, culture, lifestyle and behaviour. This data has been used to identify those population groups most and least likely to engage with shared transport.

2. Mapping user and non-user patterns onto three Scottish cities actively offering shared transport

Informed by the Mosaic mapping, we have produced maps, indicating population density of users and non-users of shared transport. For Glasgow and Stirling we have mapped public bike share and car clubs, while in Edinburgh, where there is currently no bike share scheme, we have focused on car clubs.

The density is demonstrated by the depth of colour, with a blue line indicating the perimeter of those within a ten-minute walk to a car club or bike share scheme, which users identified as a realistic expected journey to access a shared mode. Analysis focuses on two methods for increasing uptake of shared transport services:

- i. Identify areas not currently served by shared transport with high density of prime users and add services to them
- ii. Within areas already served by shared transport, identify ways to break down the barriers to adoption faced by these non-users

3. Interviewing users of shared transport to understand what they value about the schemes

To strengthen our understanding of what attracts users to shared transport, we commissioned interviews. The interviewees were made up of respondents to our annual car club and bike share who were keen to give further detail of their experiences. They were chosen across age, location and gender from across Scotland. They were interviewed individually, and asked both about the aspects of the schemes they like and those which present challenges. Quotes and the pertinent themes are presented.

4. Conducting a focus group with non-users to understand what they perceive the barriers to shared transport to be and how they might be resolved

To complement the individual interviews three undertaken with users, we held three separate focus groups with seven people who lived in Edinburgh, Glasgow, or Stirling, and who used neither car clubs nor shared bikes. We have grouped together the themes of their questions or pre-conceived concerns about shared transport. To consider how best to overcome these barriers, we have used a COM-B behaviour change model, to categorise them. The report ends with recommendations on how these barriers might be overcome.



The demographic of users and non-users

Most likely users

The most likely users of shared transport in Scotland come from varied age ranges and have varied levels of household income (aged 26 to 65 and earning £20-150k). They all live in urban areas and are early technology adopters. These groups are:



High status city dwellers in central areas and careers with high rewards

- Central city areas
- Household income of £150k+
- Aged between 26 and 35
- High use of technology



Educated young people privately renting in urban neighbourhoods

- Urban locations
- Household income of £20-29k
- Aged between 26 and 35
- High use of technology



Residents of settled urban communities with a strong sense of identity

- City suburbs
- Household income of £30-39k
- Aged between 56 and 65
- Early majority adopters of technology

Least likely users

The least likely users don't live in urban locations, and are more likely to have limited resources.



Householders living in **less expensive homes in village communities**

- Rural locations
- Household income of £20-29k
- Aged between 46 and 55



Urban residents renting **high density housing from social landlords**

- Challenged neighbourhoods
- Household income of <£15k
- Aged between 46 and 55
- Low car ownership



Flourishing families bringing up children and following careers

- Suburban areas
- Household income of £70-99k
- Aged between 36 and 45



Left: Santander Cycles (nextbike), Stirling

Right: Enterprise Car Club, Edinburgh, Glasgow & Stirling

Mapping user and non-user patterns onto three cities actively offering shared transport

We have produced maps, indicating population density of likely users and non-users of shared transport, based on our demographic research.

For Glasgow and Stirling we have mapped public bike share and car clubs, while in Edinburgh, where there is currently no bike share scheme, we have focused on car clubs.

The density is demonstrated by the depth of colour, with a blue line indicating the perimeter of those within a ten-minute walk to a car club or bike share scheme, which users identified as a realistic expected journey to access a shared mode.

Analysis focuses on two methods for increasing uptake of shared transport services:

1. Identify areas not currently served by shared transport with high density of prime users and add services to them
2. Within areas already served by shared transport, identify ways to break down the barriers to adoption faced by these non-users



Photo credit: Kate Bielinski



Photo credit: Stephen O'Donnell



Photo credit: neostalgic

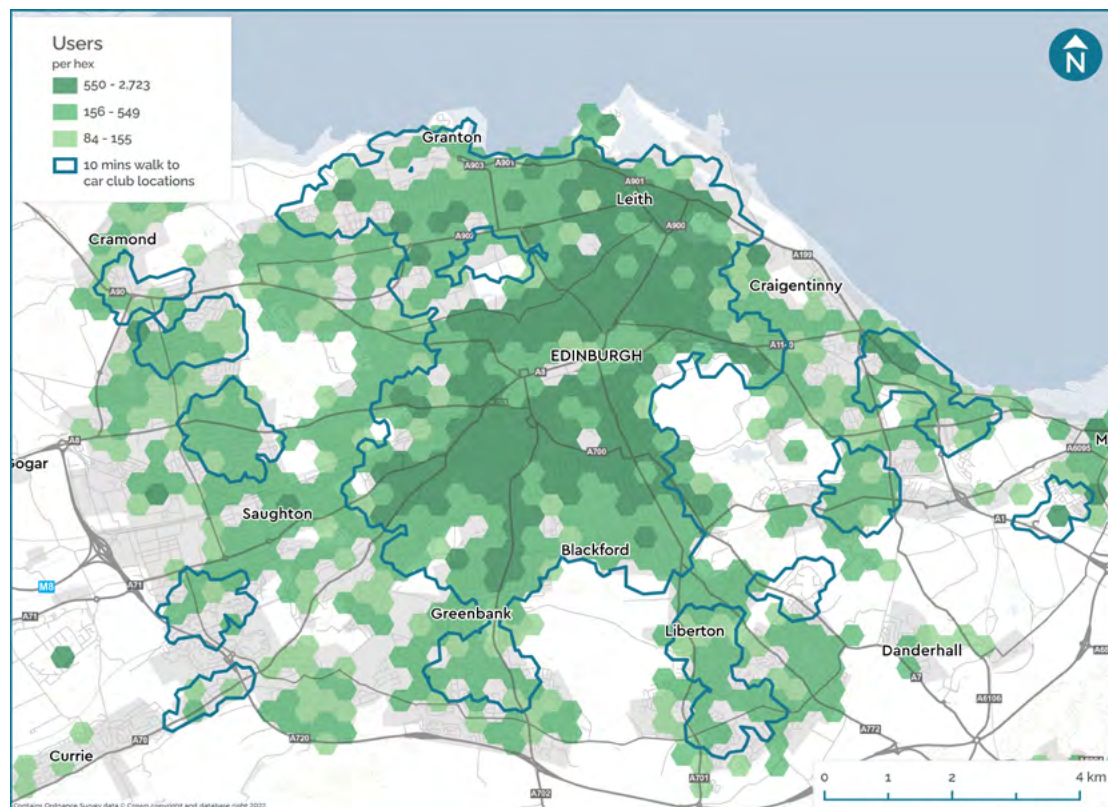


Figure 2
All car club users in Edinburgh

In Edinburgh we see good coverage in the centre of the city, as well as Leith and Blackford Hill (above). However, communities with high levels of potential users to the west of the city, most notably in Saughton, receive no coverage at all (below). Additionally, there are numerous sites where increasing coverage by just a few hundred metres could feasibly increase usage significantly.

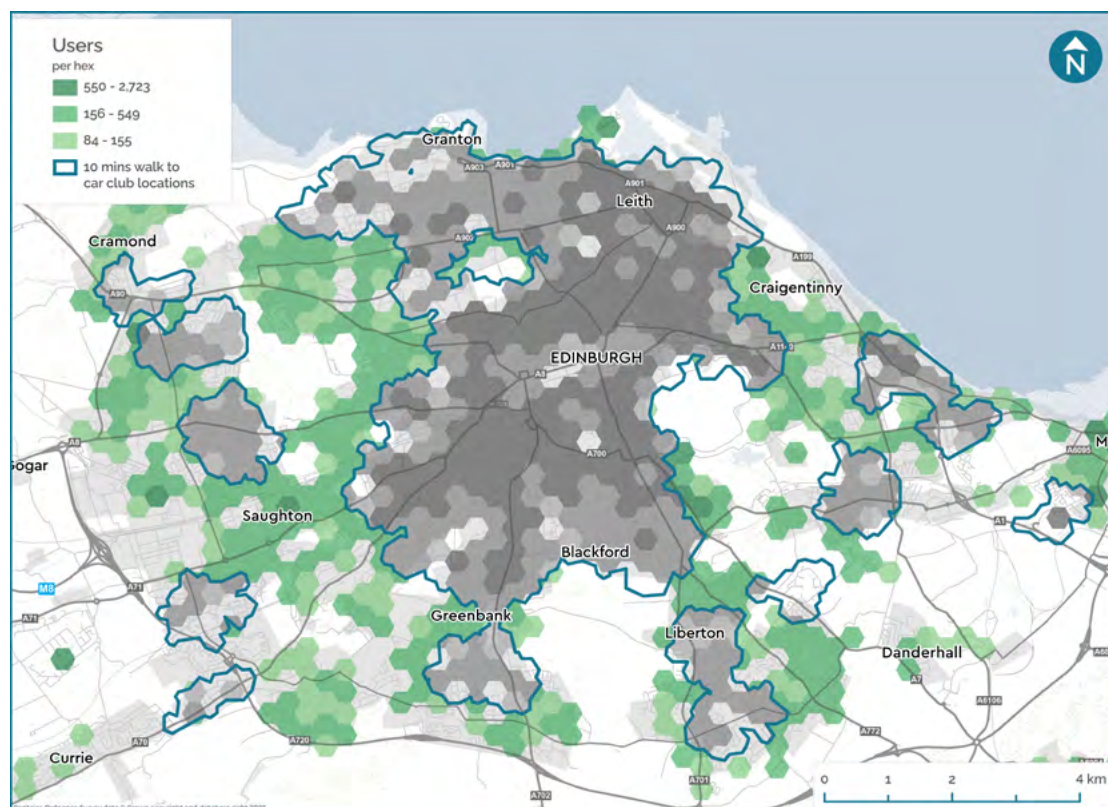


Figure 3
Potential car club users based on Mosaic groupings, within a walk of greater than 10 minutes to a vehicle in Edinburgh

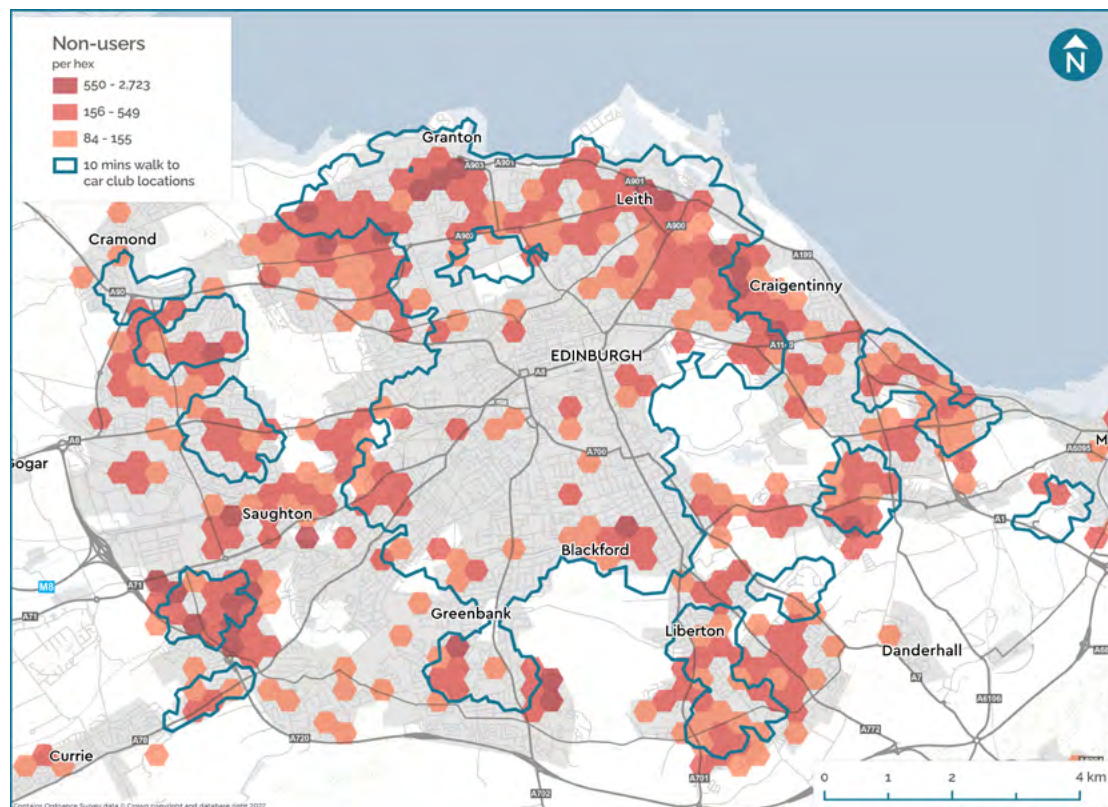


Figure 4
All car club non-users in Edinburgh

Unlike Glasgow and Stirling (whose maps are below), Edinburgh has several large areas already served by shared car clubs in which there are large numbers of non-users. The coastal regions of Leith, Newhaven and Granton represent significant opportunities for new users to take advantage of this existing provision of services.

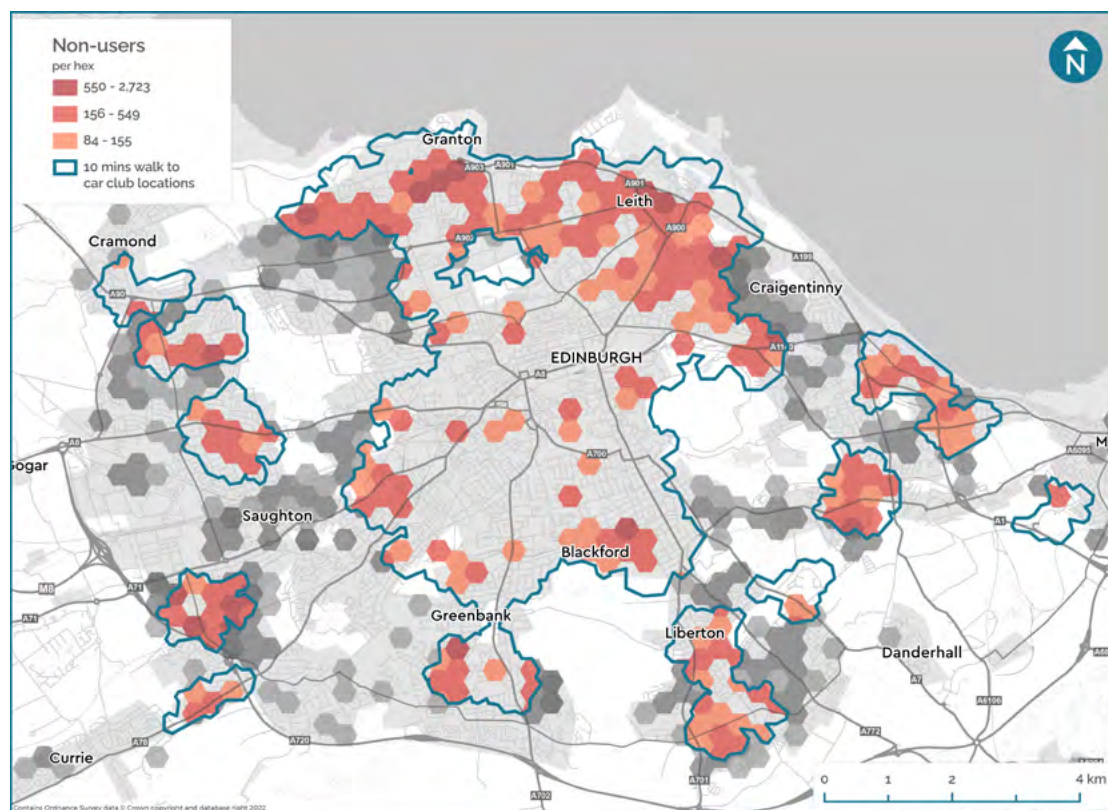


Figure 5
Potential car club non-users based on Mosaic groupings, within a 10 minute walk of a vehicle in Edinburgh

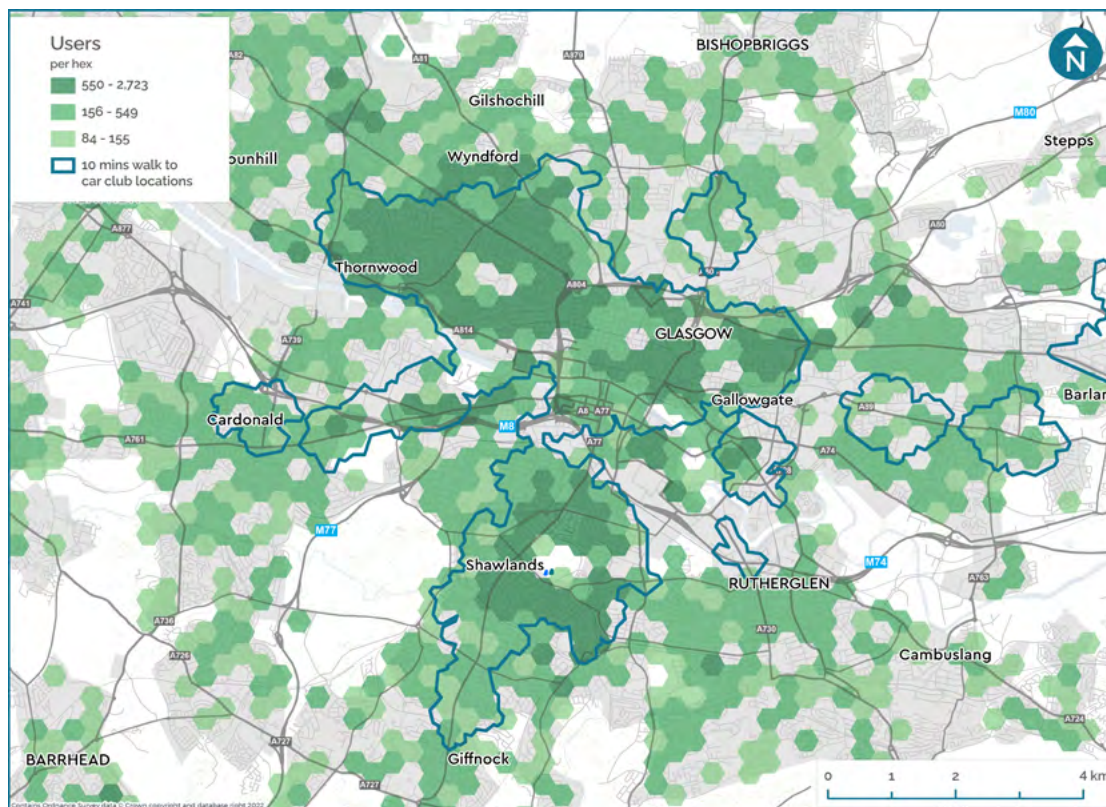


Figure 6
All car club users in Glasgow

Glasgow's car club network already provides services for almost all of the most densely populated user areas. Much like Edinburgh, there are several spots along the current boundary line that highlight the opportunity for increased uptake by prime users if additional vehicles were introduced to extend it by a very small amount and bring that journey time down to ten minutes, and join up significant numbers of areas of the city.

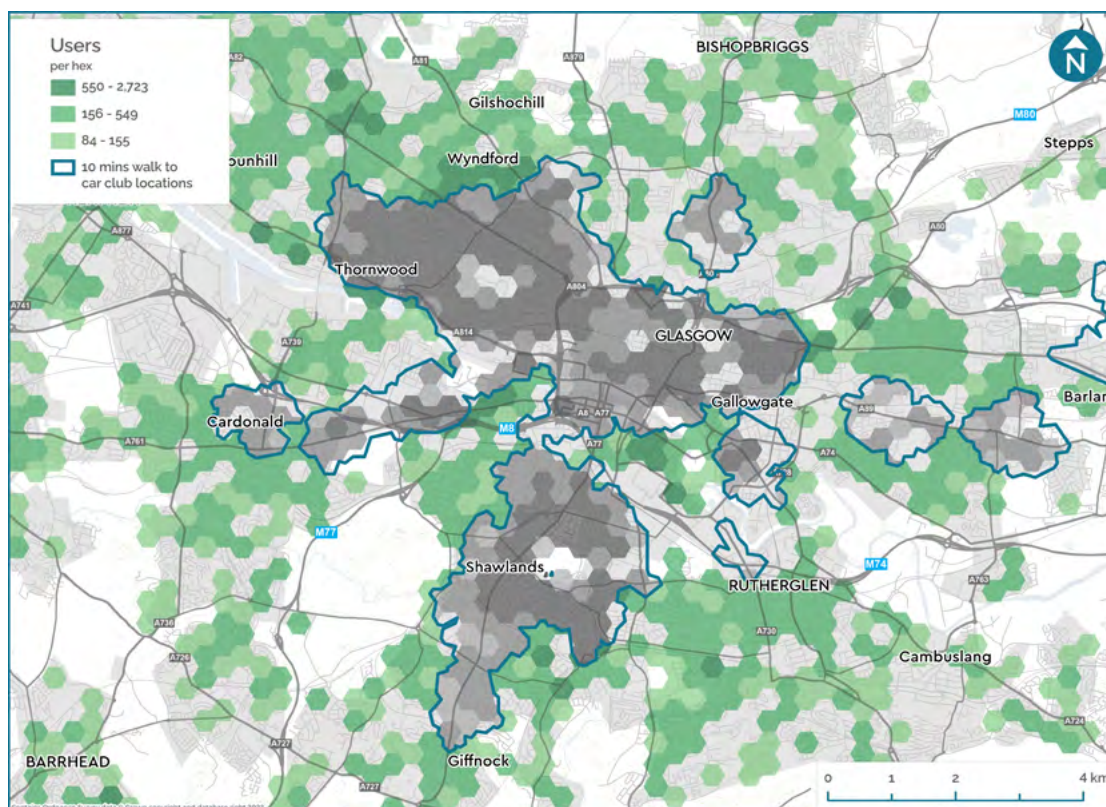


Figure 7
Potential car club users based on Mosaic groupings, within a walk of greater than 10 minutes to a vehicle in Glasgow

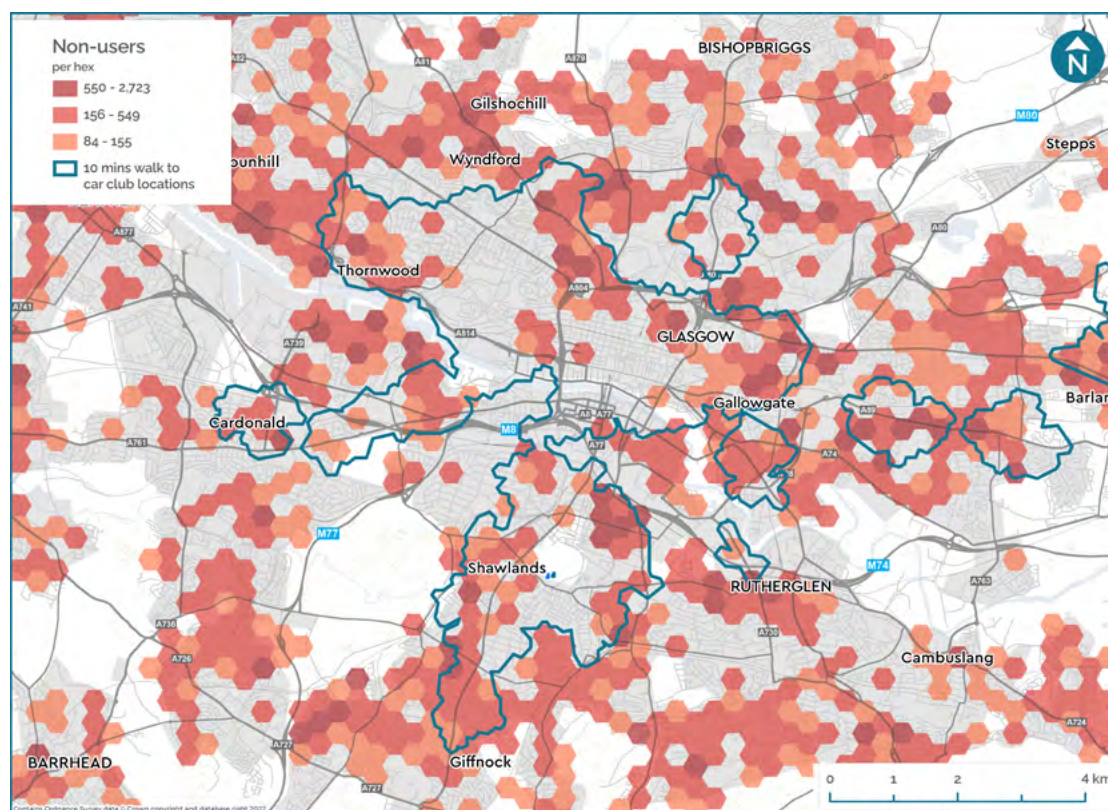


Figure 8
All car club non-users in Glasgow

The majority of Glasgow's least likely users are to be found outside of the city's centre and west end (figure 8). Further, figure 9 demonstrates that incentivisation alone would be an unsuccessful intervention, given the considerable distance these citizens would have to travel in order to use the service. That being said, some residents could benefit from their existing provision, as seen within the blue zones.

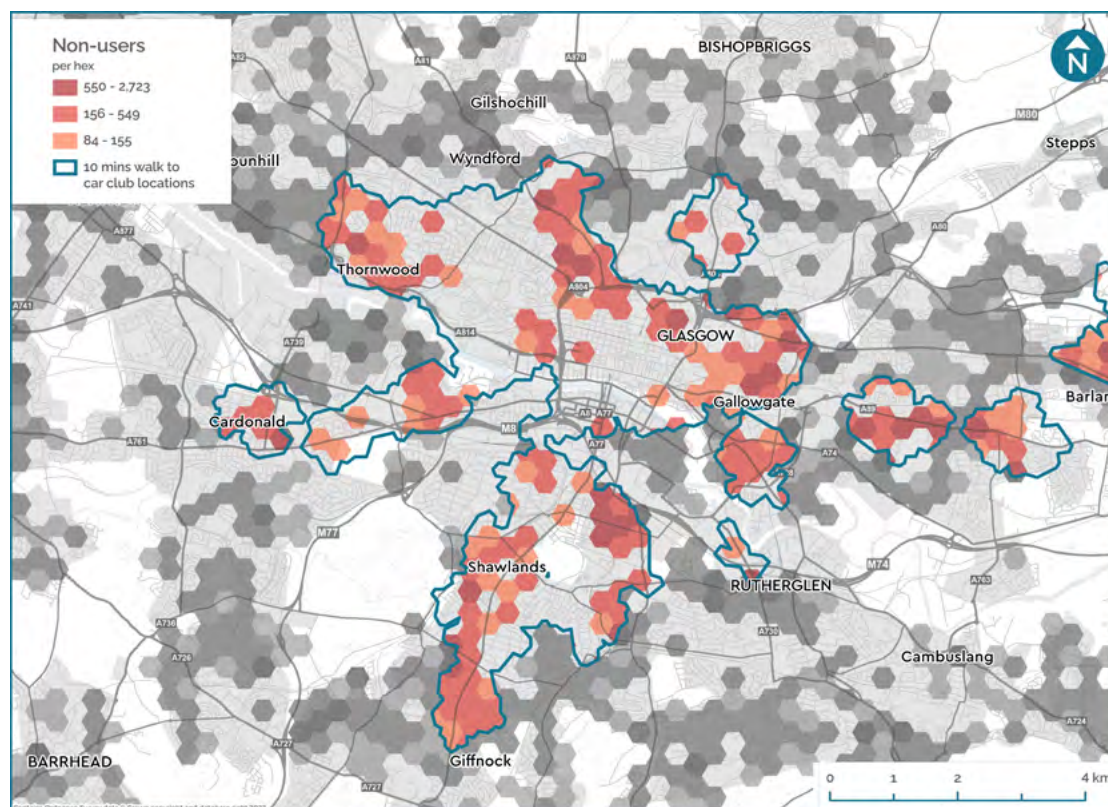


Figure 9
Potential car club non-users based on Mosaic groupings, within a 10 minute walk of a vehicle in Glasgow

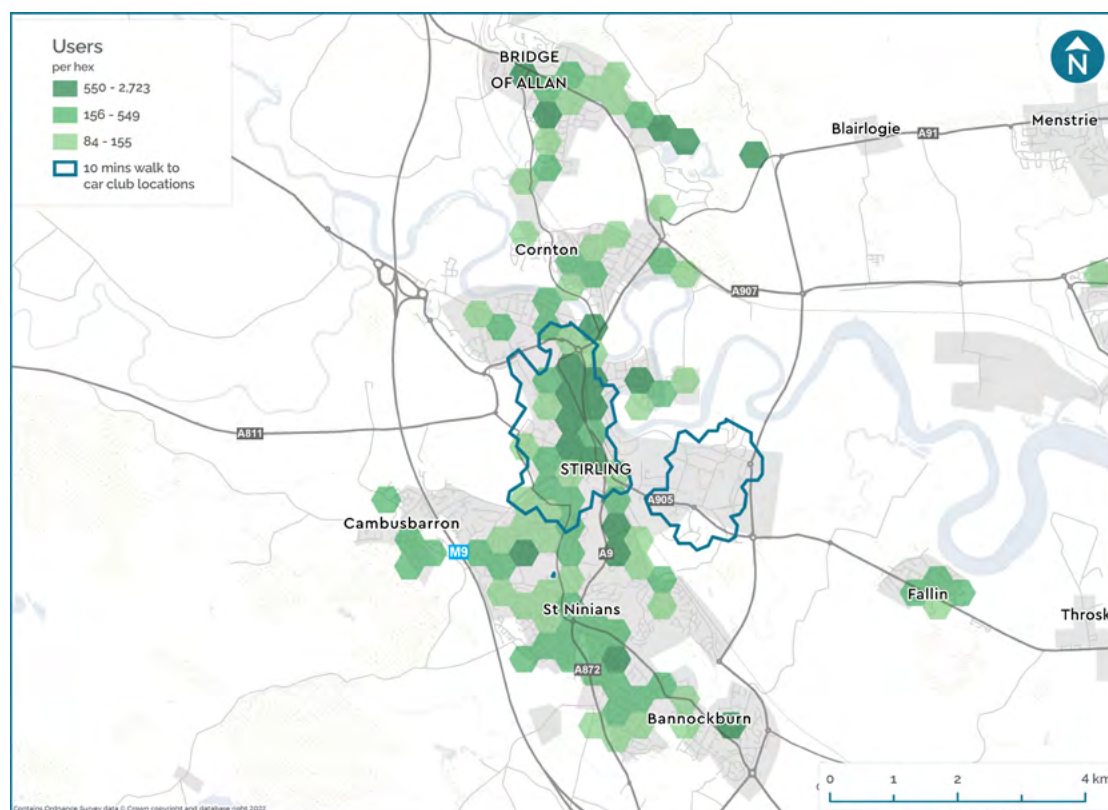


Figure 10
All car club users in Stirling

Stirling has two regions in which car club vehicles are available within a ten minute walk. One in the centre of the city and another, quite unlike any other in the three cities, which offers provision to a large retail and industrial area to the east of the city, where there is almost no residential population, hence the absence of data for this area. The settlement of St Ninians would be a candidate for the extension of services in the city given its higher levels of potential users.

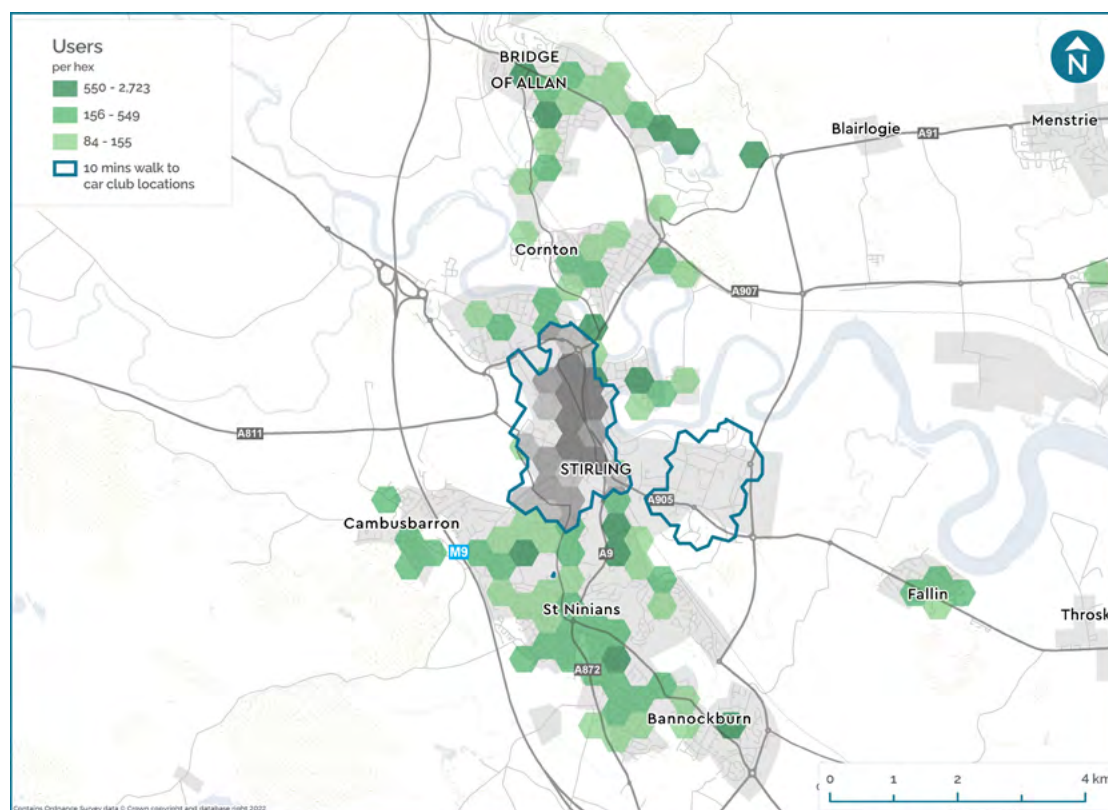


Figure 11
Potential car club users based on Mosaic groupings, within a walk of greater than 10 minutes walk to a vehicle in Stirling

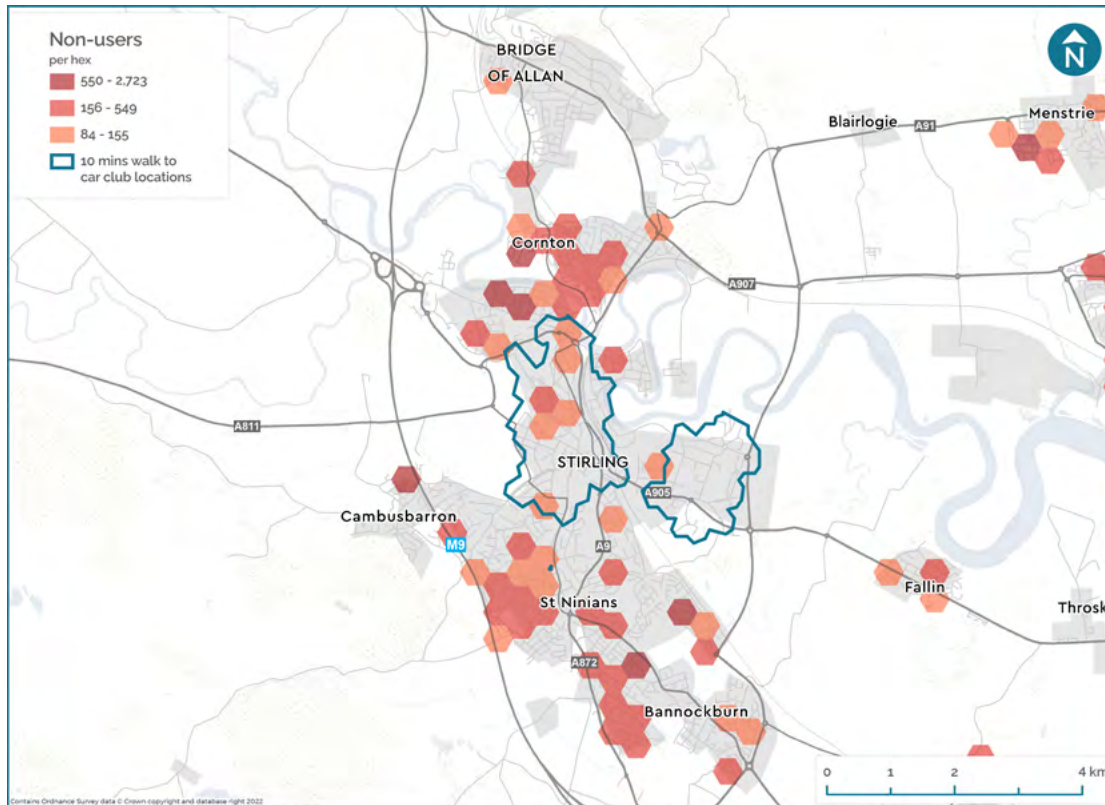


Figure 12
All car club non-users in Stirling

Non-user numbers in the areas already served by car clubs in Stirling are considerably lower than Edinburgh and Glasgow. Stirling, being a smaller city with a much smaller population gives an indication of the marginal gains that are possible in such a location. Small changes in a smaller city will be more keenly felt.



Figure 13
Potential car club non-users based on Mosaic groupings, within a 10 minute walk of a vehicle in Stirling

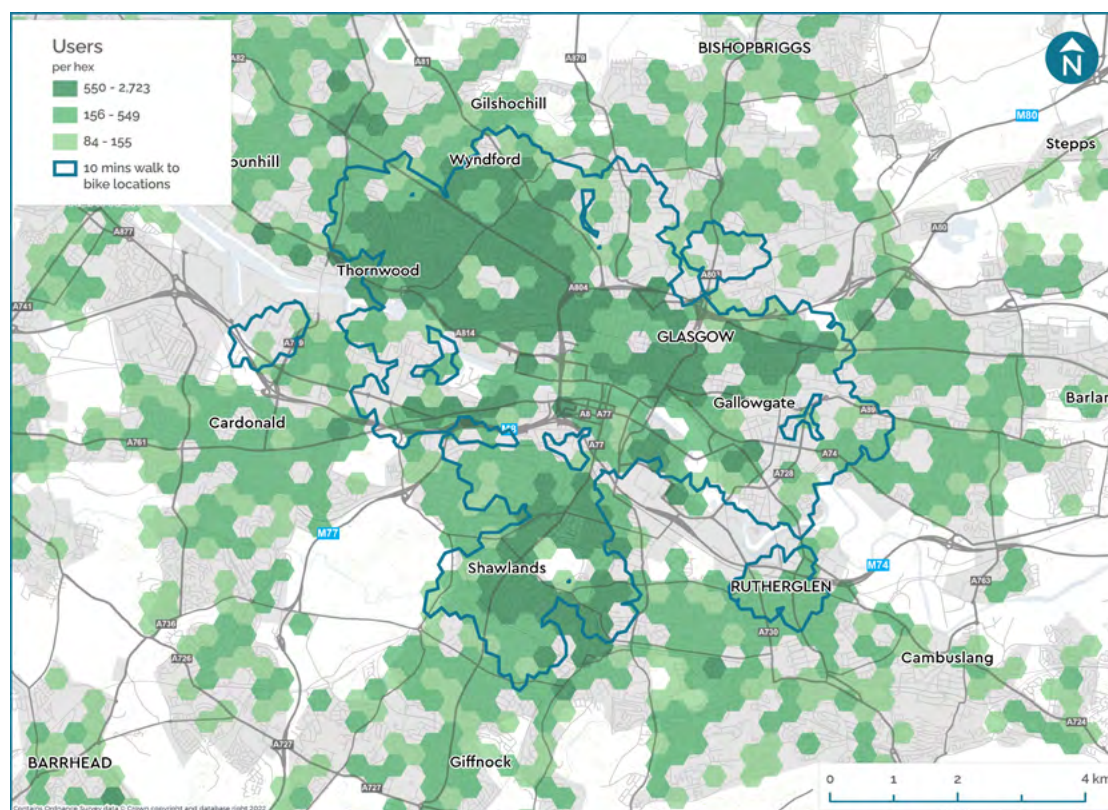


Figure 14
All bike share users in Glasgow

In Glasgow, it is clear that though the same population density does not appear in the suburbs as in the centre, there does nonetheless appear to be significant capacity to grow bike share in those areas. It is also clear that whilst some areas of unlikely users are being picked up on the outer edge of the outlined central zone, more could be done to include those further afield, perhaps increasing access to recreational areas such as Queen's Park.

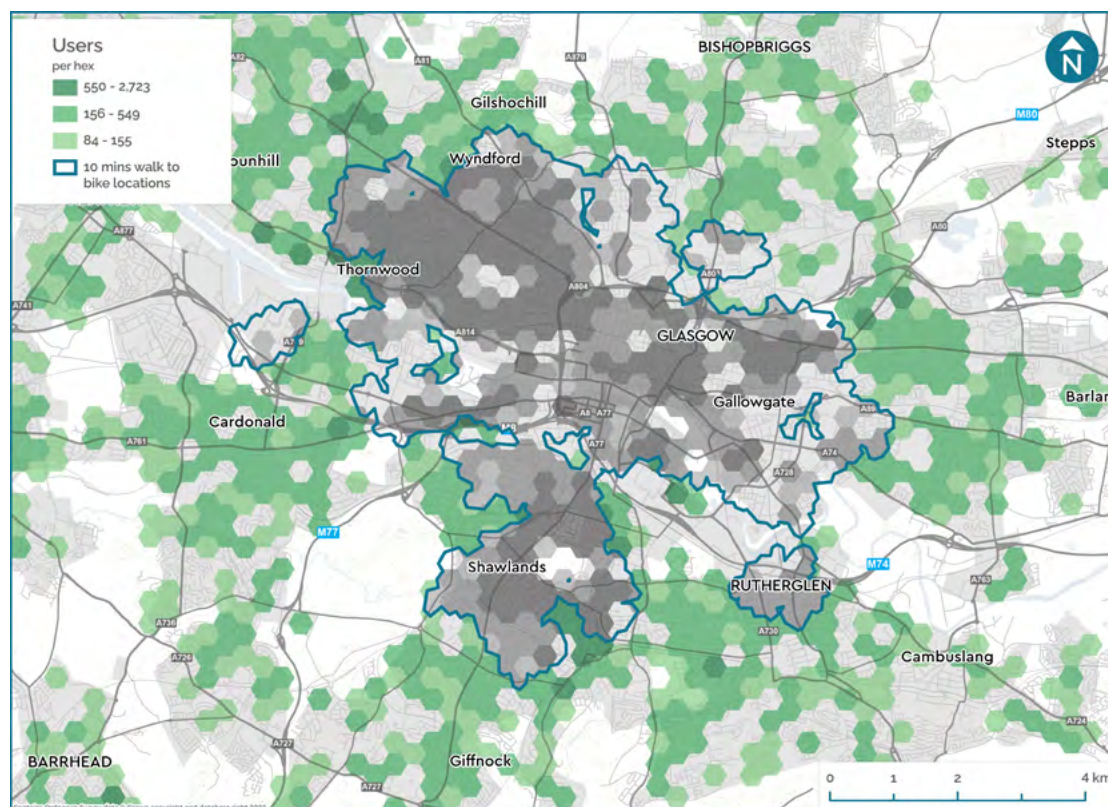


Figure 15
Potential bike share users based on Mosaic groupings, within a walk of greater than 10 minutes to a vehicle in Glasgow

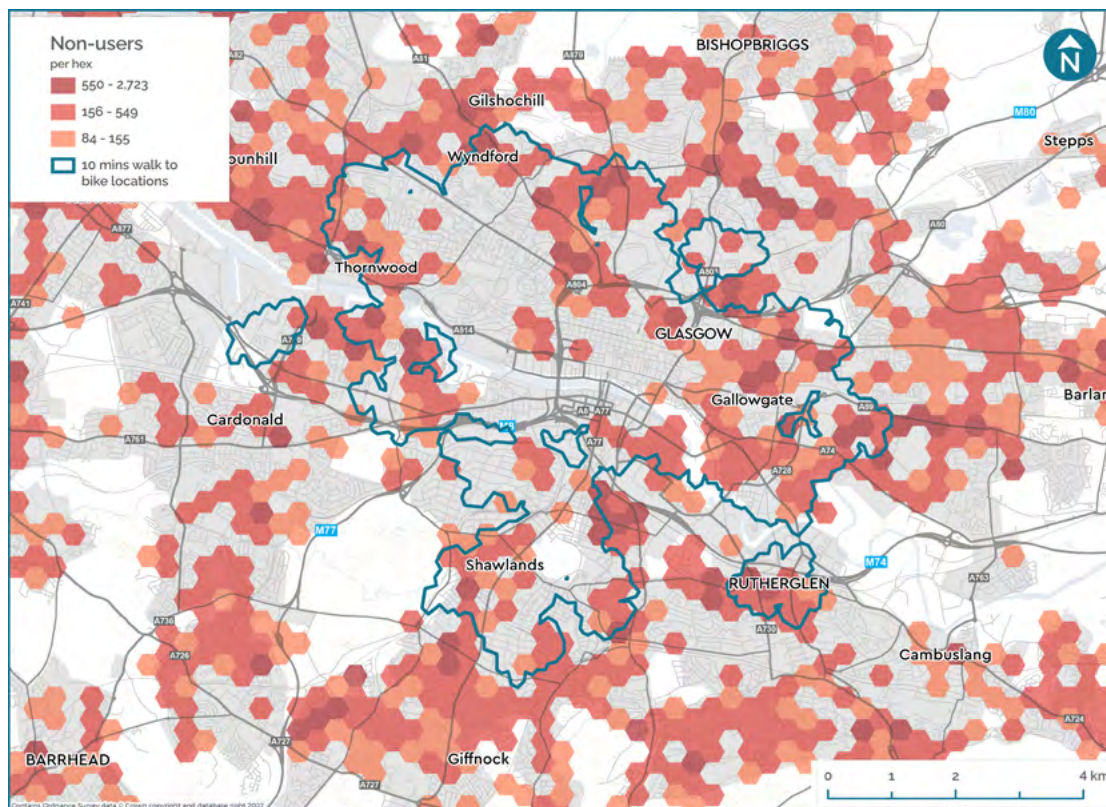


Figure 16
All bike share non-users
in Glasgow

The trends for non-users of bike share in Glasgow is a similar story to that of car clubs, thanks to the parallels between coverage of the two modes of transport. where citizens still represent significant potential users of car club across all corners of the current provision.

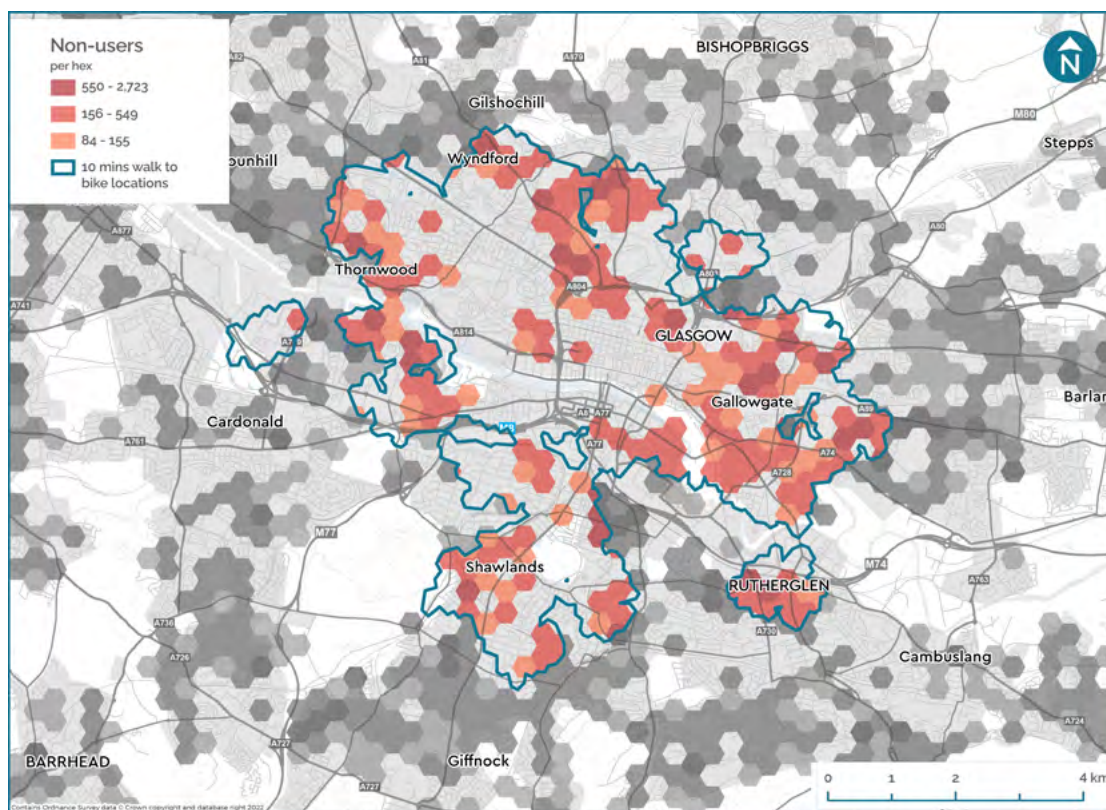


Figure 17
Potential bike share non-
users based on Mosaic
groupings, within a 10
minute walk to a bike in
Glasgow

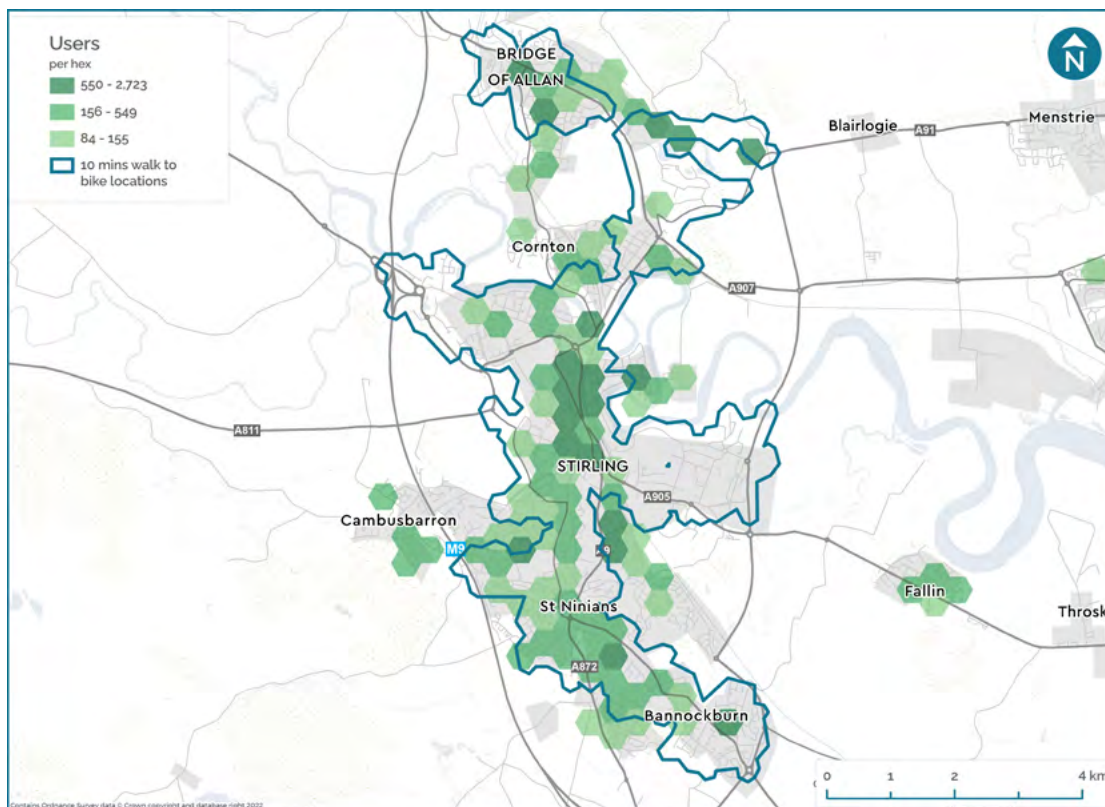


Figure 18
All bike share users in Stirling

In Stirling, where the bike scheme extends to the nearby town of Bridge of Allan, we can see a number of locales were likely users could be better served with identifying potential extra docking stations. There may also be consideration for extending the scheme to Fallin.

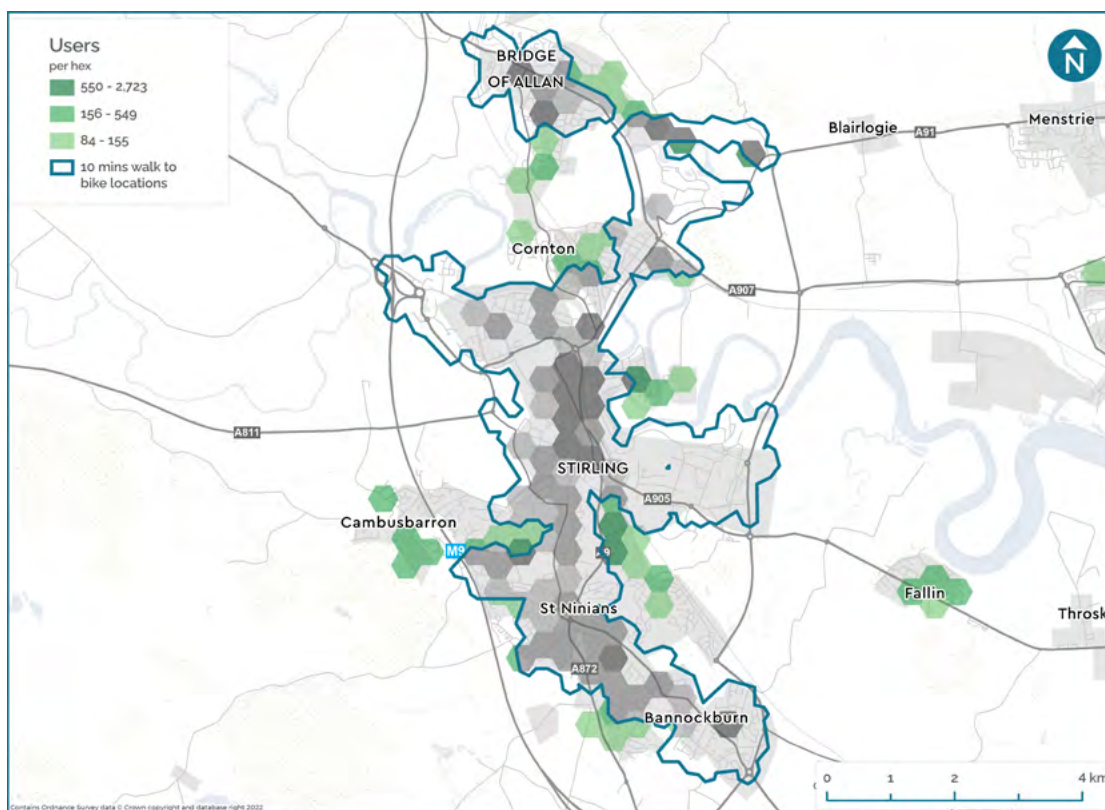


Figure 19
Potential bike share users based on Mosaic groupings, within a walk of greater than 10 minutes walk to a vehicle in Stirling

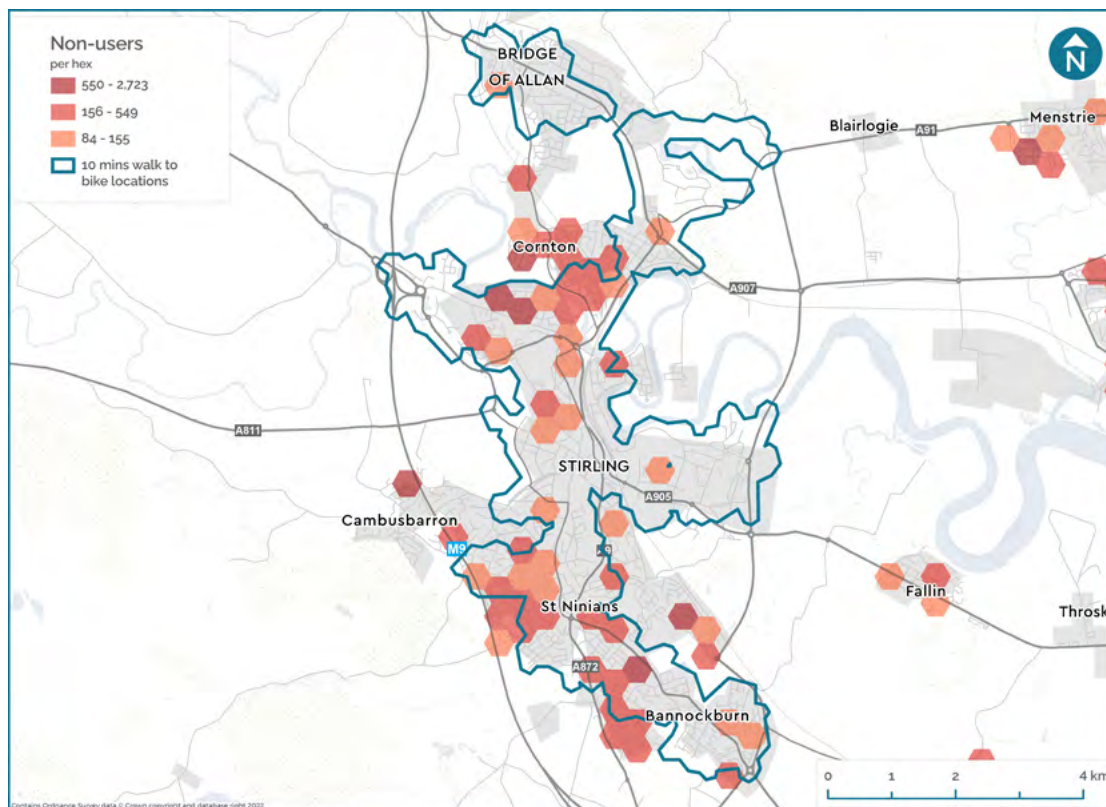


Figure 20
All bike share non-users
in Stirling

Overall, the bike share scheme in Stirling reaches a much higher proportion of the city's population than is seen in larger cities. There is strong coverage in areas inhabited by unlikely users (figure 21), so behaviour change interventions are required before any extension of the scheme.

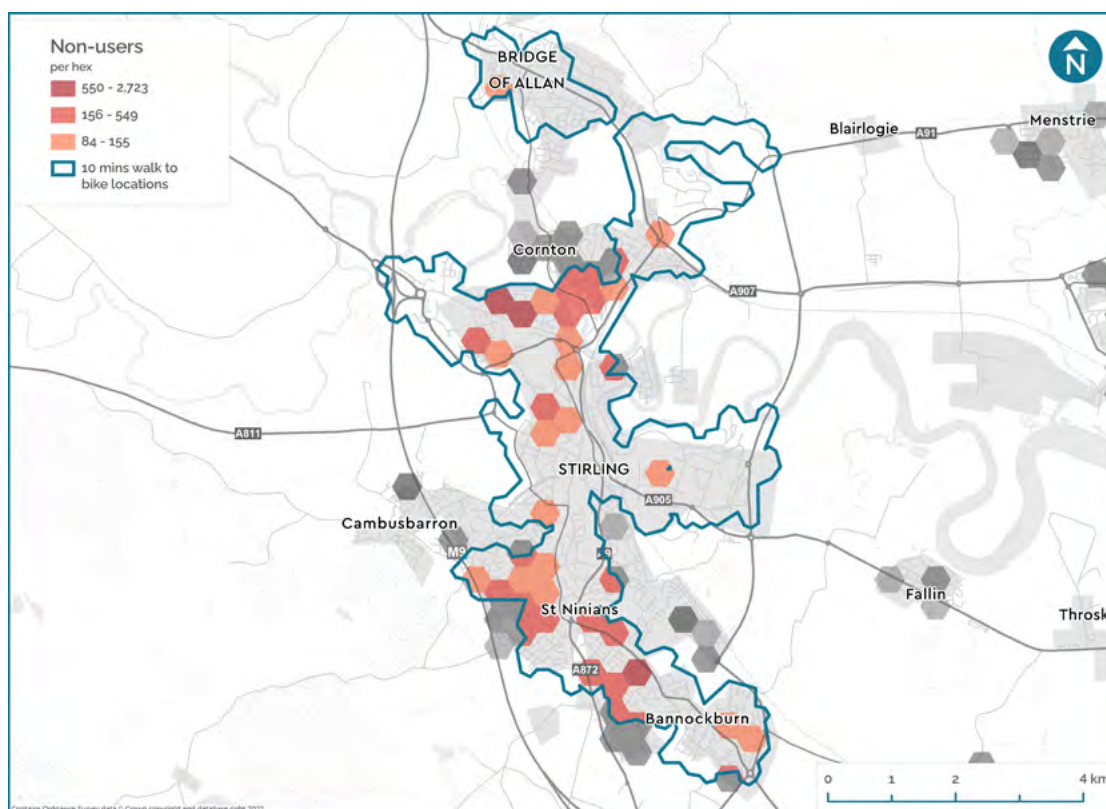


Figure 21
Potential bike share non-
users based on Mosaic
groupings, within a 10
minute walk to a bike in
Stirling

Understanding the user experience

We interviewed seven car club and bike share users and analysed the main takeaways of those conversations. The interviews were undertaken by Paul Bristo of MTC and analysed by WSP in conjunction with CoMoUK.

Car clubs



Users became aware of car sharing schemes after seeing them locally, or through word of mouth.

There were mixed responses about the convenience and availability of vehicles. One respondent noted that there is always a car available, and that they don't need to plan ahead, whereas others highlighted unavailability as a barrier to use.



Hiyacar, Edinburgh

Why people used the schemes

- ✓ **Value for money and cost effectiveness** - Several of those interviewed stated that the schemes are affordable, as they pay for the service as they use it.
- ✓ **Convenience** - Not needing to service the vehicle was also recognised as a benefit.
- ✓ **Parking** - It was noted that parking is an issue locally, but this issue is avoided by using a car club.
- ✓ **Flexibility of vehicle type** - All respondents stated that the car club gave them the opportunity to flex to different models as needed and use a brand-new car.

Interview excerpts

"I think one of the benefits around here is parking availability is very limited and around where we live I watch the other people that own cars shuffling from one street to the next trying to find spaces so I don't need to worry about that aspect of it and also the fact that you generally get to drive pretty new cars and you can try different cars if you want..."

Craig, Edinburgh

"The good thing is financially you've not got a vehicle you're paying for, insuring full time, you are paying for it to be parked on the street a lot of the time whereas the Car Club you only pay for when you're using it."

Frank, Coatbridge

Challenges

- 'Back to base' model** - Several respondents stated that a challenge is needing to return the vehicle to the same location. One person stated that the car being parked whilst at their destination feels like a waste of money (as the car is not in use).
- Potential issues with vehicle condition or cleanliness** - One respondent highlighted vehicle condition, and the need to report issues as an issue and inconvenience.
- Sense of ownership** - One respondent noted that people are used to owning their own vehicles, and therefore less likely to switch to a shared model.
- Ease of use for families** - One respondent noted that they needed to bring their own car seats for children, which could be an inconvenience (particularly, if they need to walk to a pick up location).

Interview excerpts

"If you're going to be somewhere for a while, like if we go swimming, we can be there for two hours. And then your car's just sitting outside for two hours. And you feel like you're kind of it's almost like a taxi meter running, isn't it, you're still hiring it for that period of time... so I think just for, for flexibility for our family and for work for me, I just needed it a bit more and didn't think that the kind of the car hire thing was going to work for those aspects."

Imaan, Glasgow

"I guess there may be concerns that if they need a car is there going to be one available."

Craig, Edinburgh

"The only negative is that you have to put it back to the same place which needs a bit of planning if you're going somewhere overnight but it's a small inconvenience for other benefits."

Jamie, Edinburgh

Co Wheels, Edinburgh & Glasgow





Users generally become aware of bike sharing schemes after seeing them locally. Almost all of those interviewed stated that they became aware of bike sharing scheme after seeing bikes and docking stations locally. Several respondents also noted that they had used bike sharing schemes in other cities, prior to using them in Scotland.

There were mixed responses about whether users of bike sharing schemes also owned personal bikes. Some users had a personal bike (for example, to cycle to a local train station), whereas others used bike sharing schemes as an alternative to bike ownership.

Why people used the schemes

- ✓ **Convenience and speed** - Bike sharing schemes were seen to be easy to access, providing a fast way to travel that avoids congestion associated with using the bus or driving.
- ✓ **Physical and mental health** - Both were seen as key benefits.
- ✓ **Environmental sustainability** - This was noted by one respondent as a benefit of bike sharing.
- ✓ **Cost effectiveness and value for money** - All of those interviewed stated that the services are cost effective when compared to other modes, particularly given the choice of pay-as-you-go or subscription pricing models. One respondent also noted that their university had an agreement with a bike sharing scheme, providing discounts.
- ✓ **Fun** - some respondents noted that cycling provided a fun and enjoyable way to travel.

Interview excerpts

"Easily available and the price is pretty good as well... if I have to do two half an hour rentals so an hour's worth of rental it's cheaper than a bus return or a train return and definitely cheaper than parking in the city centre so it's a no brainer."

Imaan, Glasgow

"I thought if you got one of those sunny days and you get out on your bike sometimes it can be a struggle to get on the bike but once you're on it and out there I think it has huge mental health benefits and physical ones as well."

Jamie, Edinburgh

"I like cycling it's my preferred mode of transport, it's a fun thing to do whereas I find driving quite stressful and tiring, I get quite tired when I drive and public transport, you lose a bit of control because you're depending on a fixed schedule so its that combination of fun, cheap and giving me the flexibility to get to where I need to be. "

Pablo, Glasgow

"Cycling seems to be the quickest way of getting around, buses take forever and walking takes so much longer so it's a quick way of getting around. I get my exercise so I don't have to go the gym or pay for a gym membership or anything like that. By commuting by bike I get my exercise. It's eco-friendly, I'm very environmentally conscious."

Hilde, Edinburgh

Challenges

- Availability of bikes and proximity of docking stations** - Whilst no respondents noted the availability or proximity of bikes as a challenge, it was seen to be a potential barrier for non-users. For example, one respondent stated that they would be unlikely to rent a bike if they had to walk 15 minutes to a docking station. It was also noted that there is an opportunity to have a better provision of cycle hire schemes near other modes/other stations.
- Safety** - Those that had access to dedicated cycling lanes stated that the bikes felt safe, whereas others noted that safety and lack of cycling routes was a barrier for non-users.
- E-bikes** - Use of electric bikes could make cycle sharing schemes accessible to a wider pool of users.

Interview excerpts

"In my experience in my group of friends, it's the perception that it is very dangerous to be on the road with cars and buses, and unless there was a segregated pathway, they wouldn't get on it. So, I've managed to go out with people on cycle routes through here and that's fine, but that's fine for leisure but it doesn't actually help you get anywhere that you need to go to."

Pablo, Glasgow

"I think [a challenge is] just the availability of bikes at stations. I know that the station we're next to, I know it usually has at least a couple of bikes at it, sometimes there's no bikes at it and so people can be a bit uncertain that if I'm relying on the service and it's not there, what can I do? But with us if you just walk five minutes down the road there's another bike station and there's bound to be bikes at one of them."

Imaan, Glasgow

"Often with cycling the safety issue rears its ugly head. I don't feel safe cycling, but then what annoys me is when people then argue against segregated cycle lanes at the same time."

Jamie, Edinburgh



OVO Bikes (nextbike), Glasgow

Understanding non-users

To complement the individual interviews undertaken with users, WSP held three separate focus groups with seven people who lived in Edinburgh, Glasgow, or Stirling, and who used neither car clubs nor shared bikes.

The non-user study group comprised of three women and four men, with an age range of 25–70. They consisted of both homeowners and renters, and a mixture of full time workers, students and retirees. Single parents were represented, as well as those from families with multiple children.

Questions and opinions from non-users

Those interviewed had a wide range of questions about shared transport, highlighting gaps in their knowledge of it and perhaps hinting at the perception of shared transport more widely.

Some of these questions and opinions are easily answered or countered, but do demonstrate the reality of the situation and lack of awareness present in the population.



Price

- What does it cost to use shared mobility?
- Are there hidden costs?
- How does the cost compare to owning a car?
- The cost of living has caused concern, but for those with cars already, they are able to simply travel less so it is not impacting them



Convenience

- How can the solution be personalised for the driver?
- One can't go wherever they want with shared mobility
- Shared mobility reduces the opportunity to be spontaneous
- Impossible to take family on bikes
- No need to drive into the city centre in own car, so why would one need a shared car?
- Can't use a shared car for work



Visibility

- People do not know where they can go on shared mobility
- They don't know how to use the offerings when they see them
- The offerings aren't always the most convenient travel option
- People don't know about all of the different options and plans
- Potential users don't know how insurance or breakdown cover works

Behavioural analysis

When speaking to those who attended the focus groups, we have conducted a psychological analysis of the barriers to using these modes.

We have used the COM-B Model for behaviour change to map the reasons why people may not use shared transport. Essentially, this model shows how for a behaviour to be adopted, three elements must all be in place:

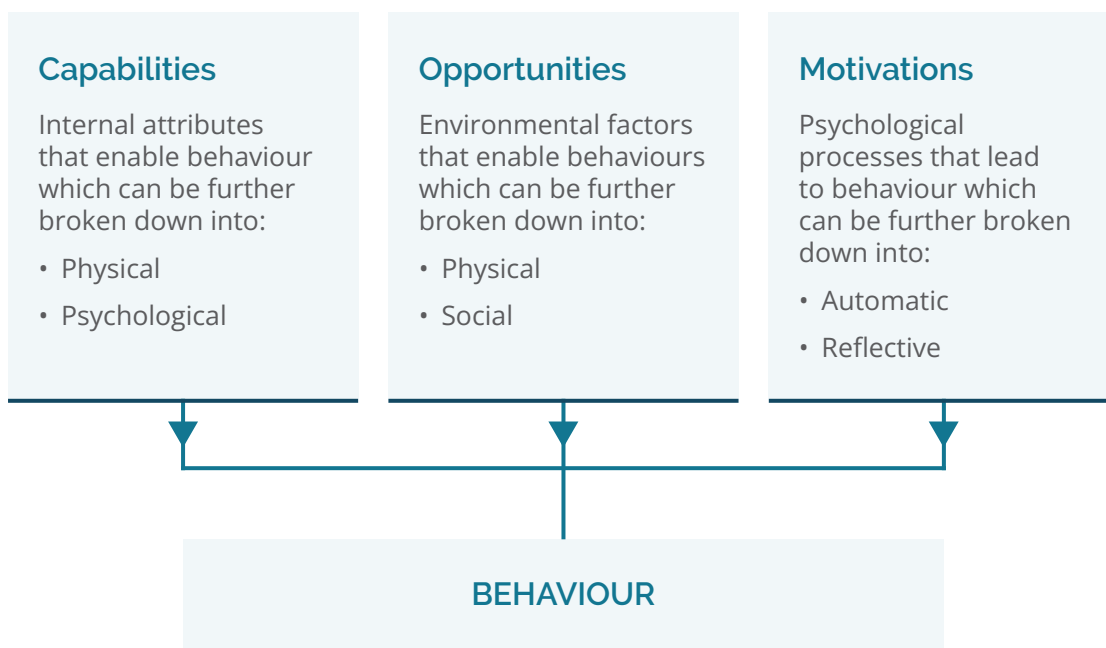


Figure 22
COM-B analysis model

Examples

Some shared transport examples of how, using COM-B analysis, we can show how the absence of any one of the three pillars prevents the desired behaviour change:

Person A

- Person A holds a driving licence and the financial means by which to join a car club. They also feel strongly about the benefits using one could have to them and their family, as well as the environment. However, there is one scheme nearby, so they simply do not have the option to adopt this mode of transport.

- ☒ Capability
- ☒ Motivation
- ☐ Opportunity

Person B

- Person B is within a 10 minute walk of a bike share docking station. They want to be able to use the scheme to help them travel to work where there is also a docking station. However, they do not have the financial means to afford the annual cost of membership.

- ☒ Opportunity
- ☒ Motivation
- ☐ Capability

Person C

- Person C currently owns their own car and have a need to continue using this mode of transport once a month. They live near a set of car club vehicles and see them regularly. Despite using the high annual cost of owning and maintaining their vehicle, relative to the infrequent use it gets, they are not thinking about that financial strain or finding it to be of sufficient weighting to consider the car club.

- ☒ Capability
- ☒ Opportunity
- ☐ Motivation

Barriers to use

Figure 23: Comments on barriers from focus group participants broken down into the COM-B model

Capabilities		Opportunities		Motivations	
Physical	Psychological	Physical	Social	Automatic	Reflective
There is no option close to me	I don't know how to ride a bike	Can't see where the options are	I don't know what shared car schemes are	Trips are already planned with current mobility access in mind	Not convenient for my uses
Company pays for my car so have no need for shared cars	Someone might not know how to drive	Expensive to hire a car	I'm too young to hire a car	They could be dirty	Too expensive
Already own a bike; why would I hire one?	I don't know how to hire a bike	Already paid for a car so it is cheaper	They're for people who can't afford cars	Bikes probably aren't safe as you need your own helmet	Doesn't take me where needed
Cycling can be dangerous	I'm worried about the costs involved in car hire	Driving in the city is already hard work		Cars aren't there when needed	Already drive a low polluting vehicle
		Public transport is cheaper		Walking is the healthier choice	Try to be green without inconveniencing myself
		Restrictive on destinations			Wouldn't know where to park a bike
		Bikes look unwieldy			Public transport is very efficient
					Car needs to be available 24/7

Areas for growth of car club users



There are some key areas for each city where prime users currently have no provision of car club. The highest density areas have been outlined in red on the adjacent maps.

It is noted that additional barriers that are beyond the scope of this report exist and may include things that make it impractical or uneconomical to provide services in specific areas.

In Edinburgh there are a few spots just outside the current ten minute walk boundary line, and the cluster of these in Prestonfield is of particular note. Expansion into the new areas could reach

Meanwhile in Glasgow, we can see several clusters, all close to the existing provision, but just out of that key measure of being a ten minute. Such areas include Hutchesontown, Cessnock, Anniesland, Wyndford and Dennistoun.

Stirling has the greatest proportion of prime users not being served, with more areas identified as prime users not being served than those that are in the centre of the city.

Expansion into the red areas in each city could increase the user base by¹:

- Edinburgh ~13,092
- Glasgow ~44,185
- Stirling ~19,638

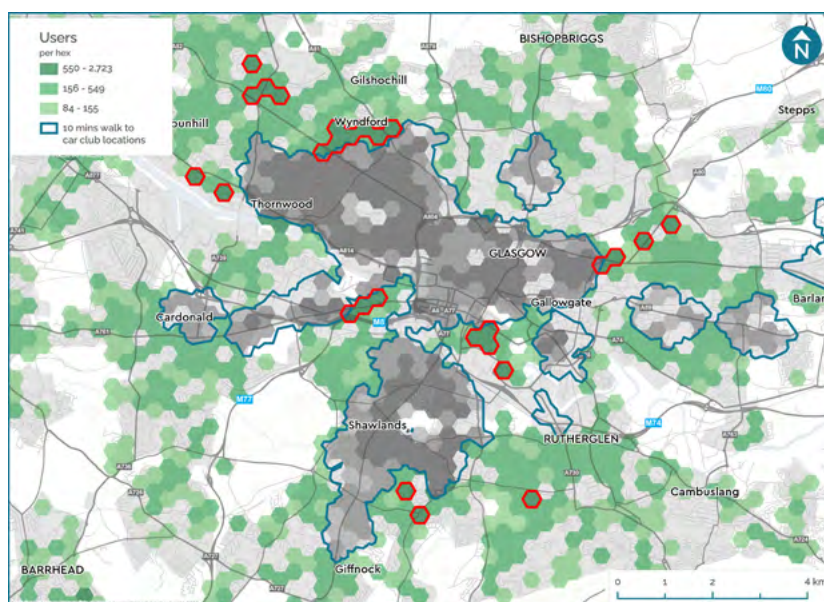
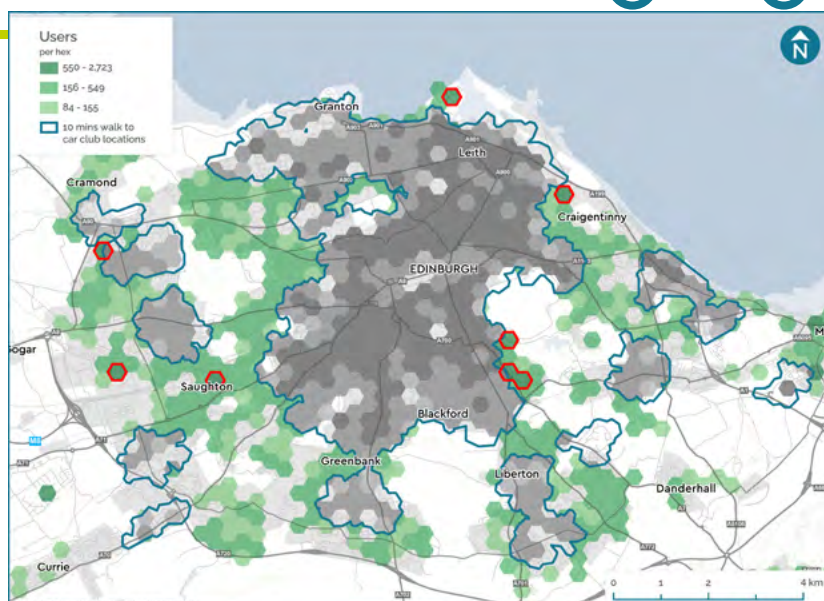
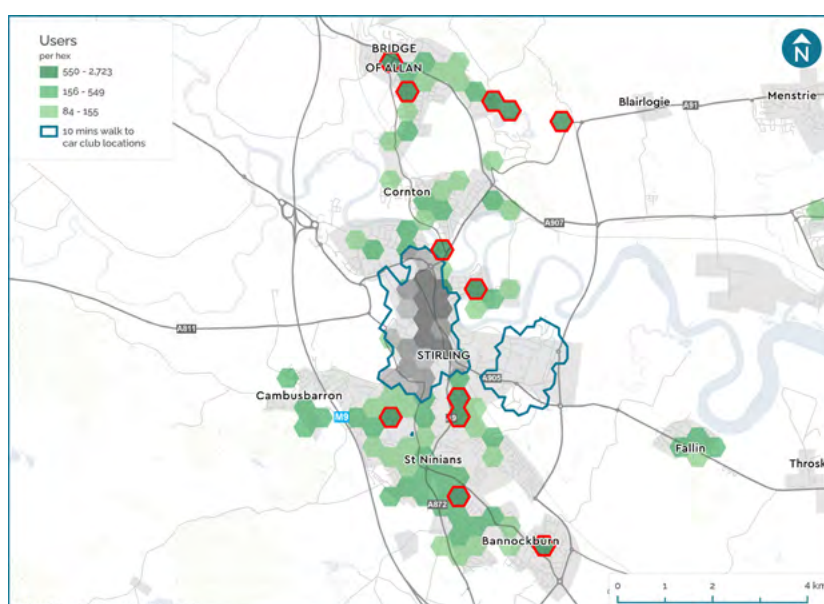


Figure 24 (top): Prime areas of potential car club users with a walk of greater than 10 minutes walk to a vehicle in Edinburgh

Figure 25 (middle): Prime areas of potential car club users with a walk of greater than 10 minutes walk to a vehicle in Glasgow

Figure 26 (bottom): Prime areas of potential car club users with a walk of greater than 10 minutes walk to a vehicle in Stirling



1 Each hexagon showing the highest user density areas represents 550-2723 users. The median for a single one is 1636. We have multiplied this by the number of red outlined ones to arrive at a figure for each city.

Areas for growth of bike share users



There are some key areas for all three cities for increasing the numbers of car club and bike share locations to areas with the highest numbers of potential users.

In Glasgow there appear to be significant areas of prime users between Shawlands and Linn Park. Additionally one is drawn to the opportunity to extend and provide bikes at Thornwood.

Bike share provision in Stirling is extensive. With such a large area offering access to bikes within a ten minute walk, there remain only a small handful of areas, that are hot spots for growth of the scheme. All four of these are right on the edge of the existing provision.

Expansion into the red areas in each city could increase the user base by¹:

- Glasgow ~40,912
- Stirling ~6,546

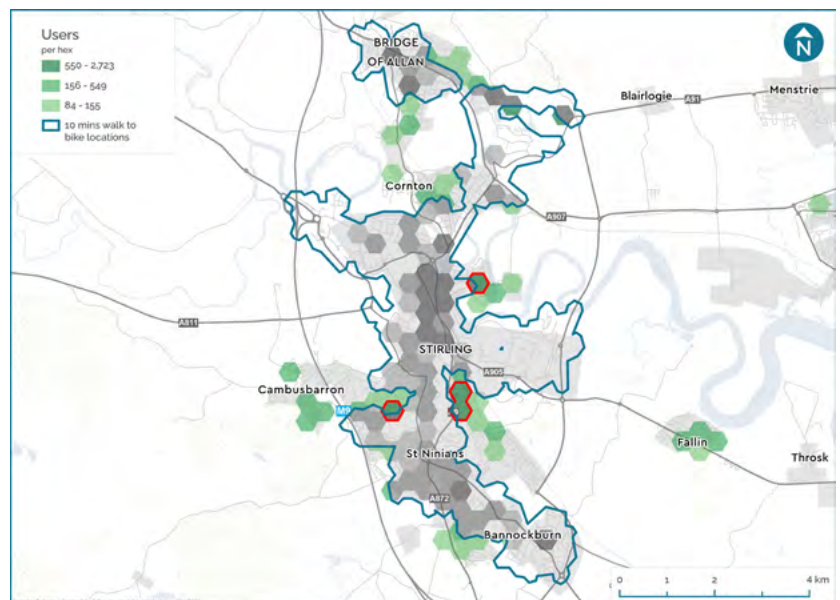
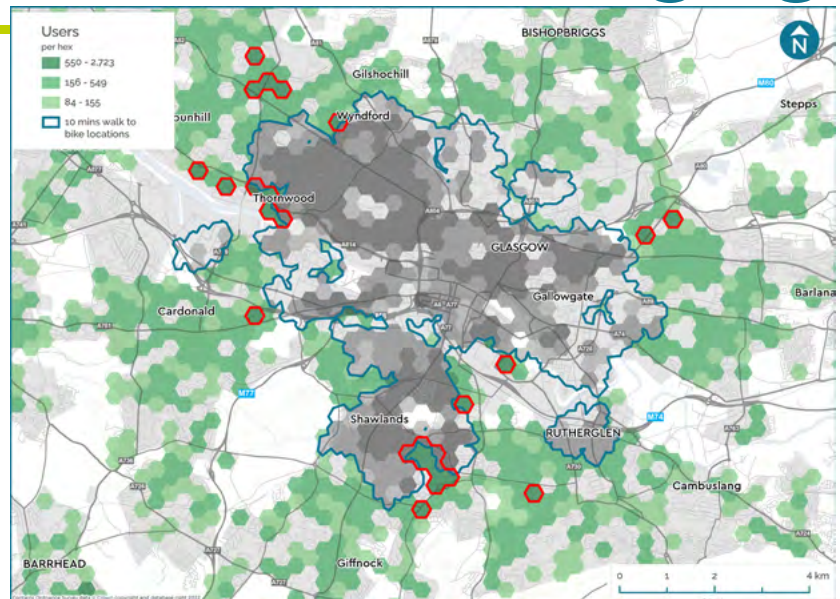


Figure 27 (top): Prime areas of potential bike share users with a walk of greater than 10 minutes walk to a bike in Glasgow

Figure 28 (bottom): Prime areas of potential bike share users with a walk of greater than 10 minutes walk to a bike in Stirling

1 Each hexagon showing the highest user density areas represents 550-2723 users. The median for a single one is 1636. We have multiplied this by the number of red outlined ones to arrive at a figure for each city.

Attracting non-users

Any intervention to encourage greater use of shared mobility needs to consider a non-user's **capabilities**, **opportunities**, and **motivations**. Interventions that only address one of these areas will struggle to change behaviour.

The interventions are split into three sections, Education, Visibility, and Improved Service. These areas will go some way to encourage current non-users to take up shared mobility.

Education

✓ Leaflet drops in areas with high proportions of potential users

- Target areas with people who might be susceptible to taking up shared transport. Advertising a local car club or bike share as belonging to the individuals will play on a psychological lever around ownership. People like “owning” community things and this may encourage support.

RESOURCE: [CoMoUK Bike share guidance for local authorities](#)



✓ Target new housing developments/refurbishments

- New movers have not set in their ways for commuting so are susceptible to changing habits. The “fresh start” effect in psychology allows people to form new behaviours when things change.

RESOURCE: [CoMoUK New developments and shared transport](#)

✓ Encourage operators to display pricing front and centre

- Price was a specific concern for interviewed non-users demonstrating the need for operators to highlight their pricing and pricing structure when attracting new users. Where costs are subsidised by transport authorities or the operator, this should be particularly highlighted.

RESOURCE: [CoMoUK Travel Better tool](#)

✓ Provide bike and car share information to businesses

- If companies have information, they can provide it to their employees. This could work particularly well with new employees who have not settled into habitual ways of commuting, or those who have changed work patterns following Covid-19.

RESOURCE: [CoMoUK Shared transport: an action kit for employers](#)

✓ Increase messaging on environmental credentials of shared mobility

- Many people consider themselves environmentally friendly, but may not be acting that way. Just having the information to know how much better shared transport is, may prompt some to change how they travel, or consider shared mobility in future if changing cars.

Visibility

✓ Bikes and cars with more prominent markings

- People will see the bikes and cars around more, they'll stand out and so non-users will realise they are an option. This plays on humans intrinsic ability to spot things that stand out and then recognise them in future.

✓ Carry out cycling events on closed roads and offer free cycle hire

- People's reticence can be based on confusion on how to use bikes and safety. Showing people how easy cycle hire is can show people it isn't difficult.

✓ Offer free car share trials

- Just let people know how easy car clubs are to use. Letting non-users see how easy they are to use would encourage greater uptake.

Improved service

✓ Add e-bikes to the fleets

- This prevents hills and distance being an issue. Edinburgh's hills and the weather were noted as being issues, if people have assisted bikes, both will become lesser issues.

✓ Ensure there are a wide mix of solutions

- One type of car hire or bike share are unlikely to solve everyone's needs. One-way car and bike hire, as well as round trip options are needed to ensure all the end-users needs are met.



Left: Enterprise Car Club, Edinburgh, Glasgow & Stirling

Right: OVO Bikes (nextbike), Glasgow

Summary

Whilst use of shared transport is in a significant period of growth in Scotland, more must be done to attract those naturally disposed to usership, and to break down barriers that make some less likely to enjoy its many benefits.

The multi-faceted nature of this report means not one simple conclusion, but rather a call to action to operators, transport authorities and communities to work together, overcoming demographic and behaviour change challenges.

We have sought to highlight those areas where high concentrations of likely users are just with-out a ten minute walk of some major shared transport schemes. This exploration however is only the first step in a process that requires funding, collaboration, public awareness and a commitment to behaviour change. Our hope is that by demonstrating the opportunities to grow and expand will inspire those involved to consider these areas afresh.

One of the focuses of the report that presents a significant call to action is barriers to access. Such barriers can be viewed in two main categories: real and perceived. With this said, a perceived barrier is as debilitating as an actual one, highlighting the need for ongoing marketing, trouble shooting and awareness campaigns.

To those real barriers, there is clear need for government intervention to ensure those living in poorer areas and already affected by transport poverty are not further disadvantaged. With these interventions, shared transport's transformative effect on travel habits and reduction in private car usage can be more widely enjoyed across Scotland

We hope this report will be a call to action to stakeholders across Scotland to collaborate, build and strengthen shared transport across the country.

Rachael Murphy
Scotland Director



Co Wheels, Edinburgh & Glasgow

If any area of this report has interested or challenged you, or you have questions about shared transport and its opportunities for Scotland, please get in touch with the team at scotland@como.org.uk.

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