

SHARED TRANSPORT

Existing Shared Mobility schemes and
potential for future schemes

JUNE 2026



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1. Introduction

- 1.1. CoMoUK (Collaborative Mobility UK) has been commissioned by Transport East (TE) to produce a study on existing and potential shared transport services in the TE region. CoMoUK is the national charity dedicated to promoting the social, economic and environmental benefits of shared transport. CoMoUK's work builds on 25 years of experience in researching shared transport in the UK and as part of various European projects. TE is the Sub-national Transport Body for Norfolk, Suffolk, Essex, Southend-on-Sea and Thurrock.
- 1.2. This study covers existing shared transport schemes and the potential for future schemes of the following modes:
 - Car clubs,
 - Lift sharing,
 - Bike share (with references to shared e-scooters, where synergies emerge),
 - Digital Demand Responsive Transport (DDRT) and Community Transport (CT).
- 1.3. The study draws on data from shared transport operators, CoMoUK's analysis of demographic data from the 2021 Census, data provided by local authorities in the TE region, and other data sources that are specified throughout this report. The data collection for this report was concluded in November 2025. All data, unless otherwise stated, is reflective of that date.
- 1.4. The remainder of the report is structured by shared mode and concludes with a list of recommendations for local authorities in the Transport East region, including a Local Authority Considerations Checklist.

2. Car clubs

Introduction: What is a car club?

- 2.1. Car clubs give people access to cars without the costs or other obligations of owning or leasing one. Most car clubs operate on a membership basis with members paying an annual or monthly fee and then paying per hour to use cars. Fees include fuel/EV charging and insurance.
- 2.2. Commercial car clubs typically operate according to one or a combination of three models:
 - Back to bay (B2B) – This is the most common form of car club in the UK whereby cars must be returned to their unique designated parking place.
 - Back to area (B2A) – As with back to bay, but the car must be returned to a small designated area, usually a street or two.
 - One-way / flex (1W) – In this newer and less common model, the car can be taken on a one-way trip and parked wherever it is permitted to do so.
- 2.3. Other forms of sharing cars include:
 - Peer to peer (P2P) sharing, where individuals can provide their vehicles via an online platform for others to use in a similar way to car clubs.
 - Closed loop car clubs offer shared cars only to selected members, e.g. community group.
 - Informal car sharing between private individuals.
 - Lift sharing within the same car at the same time, also known as carpooling (see Section 3 below).

Car club benefits

- 2.4. Car clubs provide their users and wider society with a range of social, environmental and economic benefits. CoMoUK has been conducting surveys of car club users in the UK for over a decade, leading to a wealth of evidence on their benefits.
- 2.5. Car clubs serve an audience with a “car light” lifestyle. Around 1 in 5 car club users report that the number of cars in their household decreased since joining a car club. Our latest car club report found that in 2024, **each car club vehicle in the UK substituted the need for 27 privately owned vehicles** on average. Outside London, the car reduction ratio is 20 private cars per one car club car, whereas in London this

ratio equals 31.¹ This equates to a space saving of 138 hectares throughout the UK that would be needed to store these cars.²

- 2.6. Car clubs can bring significant **cost savings to members**. Our latest survey found that 34% of car club members said that saving money was a reason for joining a car club. In another piece of research, we found that using electric vehicles (EVs) through a car club can save around £5,600 p.a. compared to owning an EV, given the high purchasing cost and rapid depreciation of vehicles.³
- 2.7. Car club users in the UK are more likely to travel at other times by foot, bike or public transport than the average population.⁴ The below findings from the 2024 CoMoUK Car Club report illustrate this:
- **36%** of active car club users use a bicycle at least once a week, compared to a national average of 12% in England.
 - **55%** of active users reported using a train or tram at least once a week, compared to 9% of the English population.
 - **53%** of active users use a bus at least once a week, compared to 21% in England.
 - **87%** of active users reported walking for 20 minutes or more at least once a week. This compared to 77% of the general English population (in 2023).
- 2.8. People using car club vehicles are likely to drive less overall. Based on self-reported behaviour change in our 2024 car club user survey, this equates to a net annual mileage reduction of about 185 miles per car club user after joining the car club.⁵
- 2.9. The mileage reduction achieved through car club use also results in a reduction in emissions, supporting air quality and net zero targets. The 185 avoided miles equated to a reduction in CO₂e of 30kg per user in 2024.⁶ Emission reduction thanks to car clubs are typically even greater, given the composition of the UK car club fleet that includes 30% electric vehicles (EVs), compared to only 3.5% of all cars in the UK.

¹ [CoMoUK Car Club Annual Report 2024: United Kingdom](#) (p. 24-25)

² We arrive at this number by calculating the reported net change in car ownership among car club users. On average, each car club member disposed of 0.4 cars since joining the car club, which equates to a reduction of 119,973 vehicles. We then multiply the number of reduced vehicles with the area recommended for a car park by the British Parking Association (2.4 by 4.8 metres).

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

⁴ [CoMoUK Car Club Annual Report 2024: United Kingdom](#) (p. 22-23)

⁵ [CoMoUK Car Club Annual Report 2024: United Kingdom](#) (p. 26)

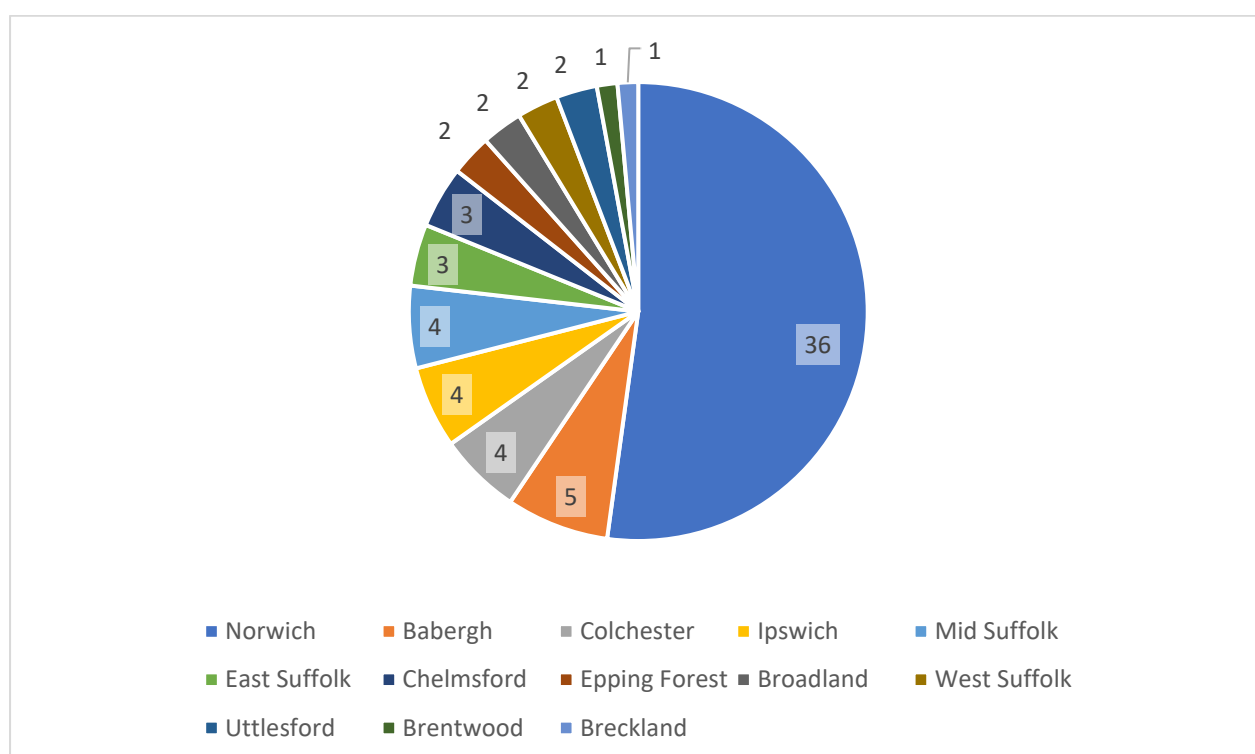
⁶ [Greenhouse gas reporting: conversion factors 2024](#) (emissions for average car, unknown fuel type).

Current car clubs in the Transport East region

Car club locations

- 2.10. As of September 2025, there were 69 car club vehicles across the whole TE region. 39 of which were located in Norfolk, 18 in Suffolk and 12 in Essex. No car club vehicles were available in the unitary authorities of Southend-on-Sea and Thurrock.
- 2.11. The number of shared vehicles by lower-tier local authorities is summarised in Figure 1.

Figure 1: Number of shared vehicles by lower-tier local authority in Transport East region (Sept 2025)



- 2.12. All car club vehicles in the Transport East region operated on a back-to-bay basis. The location of the car club bays across the region is visualised in Figure 2 and Figure 3. The colour scheme and shape of car club locations also shows that most vehicles (74%) were operated by Enterprise Car Club (shown as green hexagons), with the remainder (26%) being operated by CoWheels (shown as orange triangles).

Figure 2: Locations of car club vehicles in the Transport East region by operator (Sept 2025)

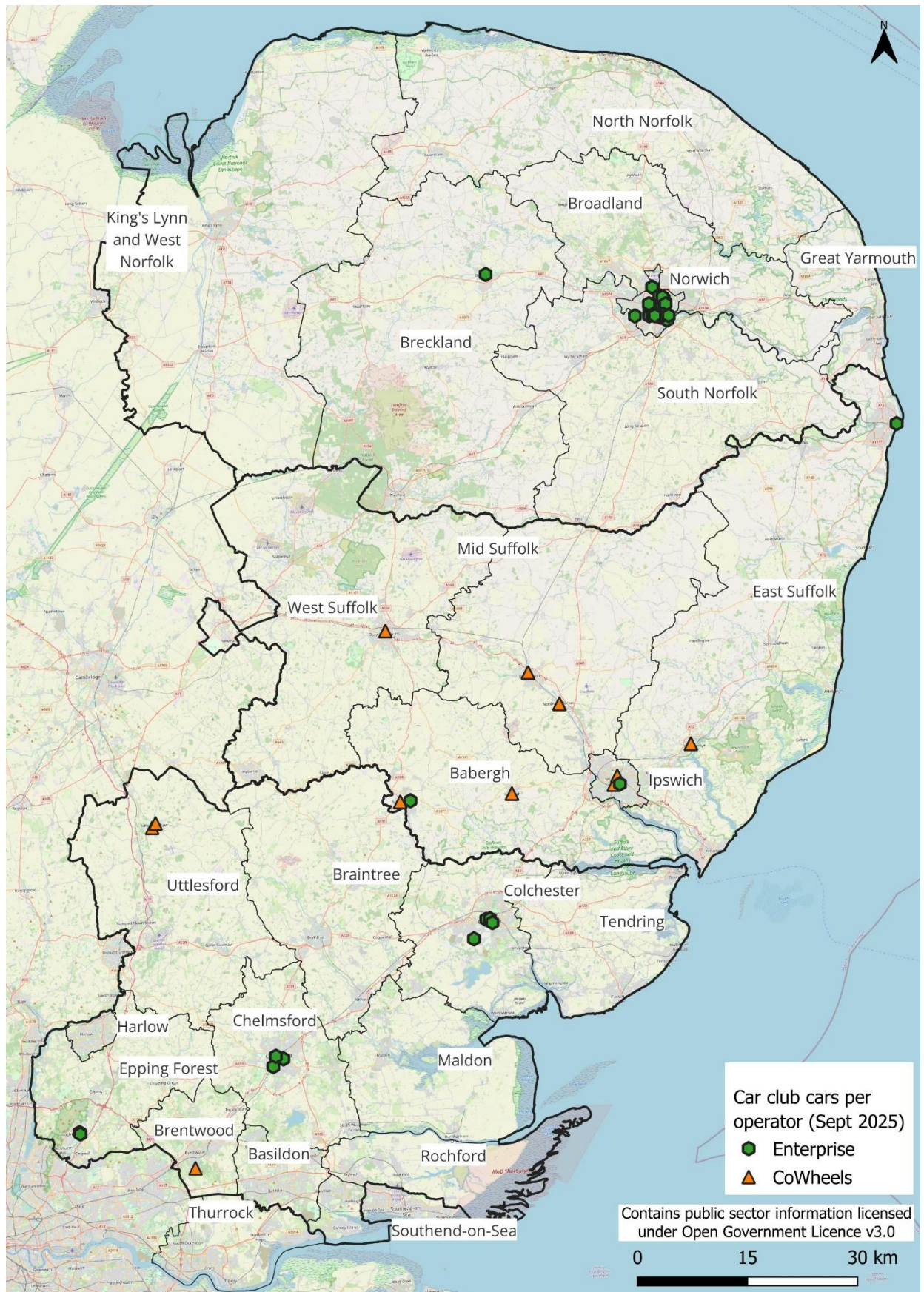
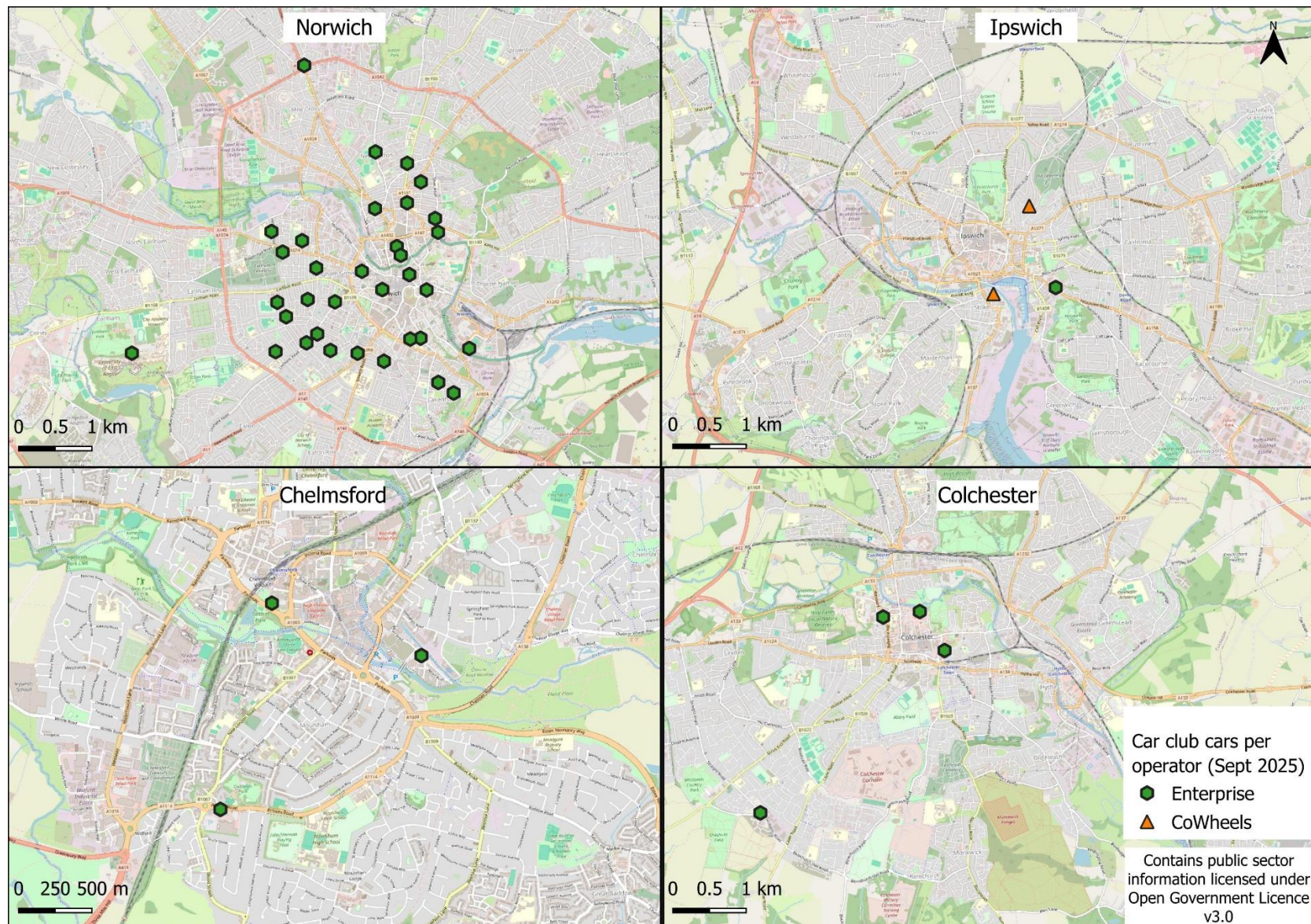


Figure 3: Locations of car club vehicles in Norwich, Ipswich, Chelmsford and Colchester by operator (Sept 2025)



- 2.13. 83% or 57 of all car club vehicles in the Transport East region are available in well-connected urban areas⁷, 12% or 8 car club vehicles are in less well-connected urban areas⁸, and 6% or 4 vehicles are located in well-connected larger rural settlements⁹.
- 2.14. The spread of car club locations in the region across Lower layer Super Output Areas (LSOAs) sorted by Rural Urban Classification (RUC) 2021 is summarised in Table 1 and Figure 4.

Table 1: Number and share of car club vehicles in the Transport East region (Sept 2025) by Rural Urban Classification 2021 (Lower layer Super Output Areas, LSOAs)

Rural Urban Classification (2021)	Number of car club vehicles (total)	Number of car club vehicles (share)
Smaller rural: Further from a major town or city	0	0%
Smaller rural: Nearer to a major town or city	0	0%
Larger rural: Further from a major town or city	0	0%
Larger rural: Nearer to a major town or city	4	6%
Urban: Further from a major town or city	8	12%
Urban: Nearer to a major town or city	57	83%
Grand Total	69	100%

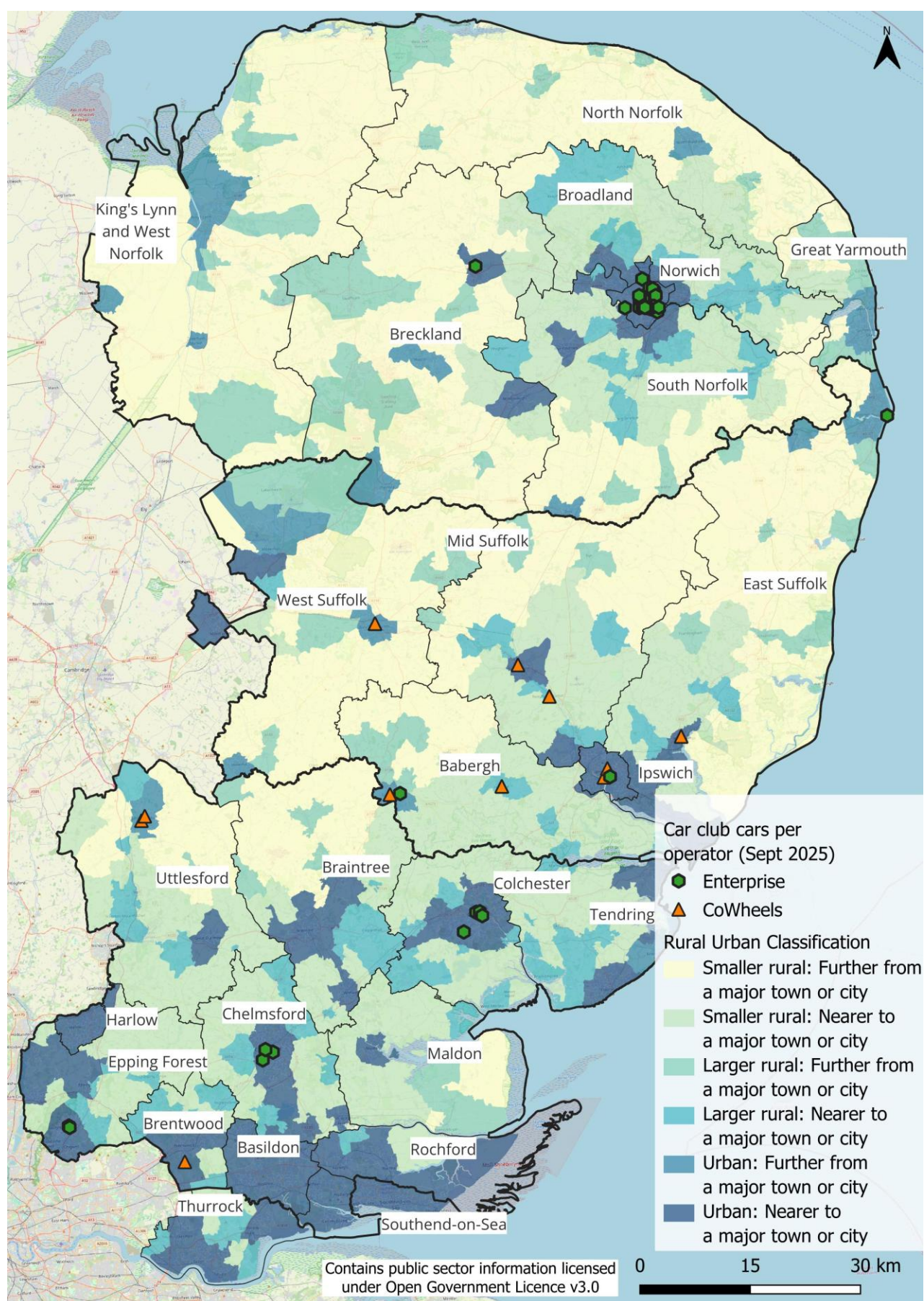
- 2.15. CoMoUK does not have data on car club trip metrics for the East of England. However, data is available for trips in all of England outside London. These metrics are similar to trip metrics from Scotland, which suggests that average trip data in the UK, outside of London, follows a similar pattern:
- The median duration of a car club hire in the UK outside of London in 2024 was 4 hours, with about 1 out of 5 hires lasting longer than 12 hours. While this median trip duration is longer than the duration of an average car trip for all drivers in England (21 minutes in 2023), most users use car clubs so irregularly that their overall car use is substantially less than that of the average adult in England (see Car club benefits above)
 - The median distance of a car club hire outside London in 2024 was 38.5 miles. About 1 out of 5 hires include trips that are 100 miles or more. Again, the average car trip for drivers in England is shorter (8.2 miles in 2023) but use patterns of car clubs result in a net reduction of car miles driven by the average car club user.

⁷ [Rural Urban Classification \(RUC\) 2021](#) by Lower layer Super Output Areas (LSOAs): Urban: Nearer to a major town or city

⁸ Urban: Further from a major town or city

⁹ Larger rural: Nearer to a major town or city

Figure 4: Location of car club vehicles by LSOA Rural Urban Classification 2021 (Sept 2025)



Car club users

- 2.16. There are no publicly available statistics on the number of car club users in the Transport East region. However, the number of respondents to the CoMoUK car club survey allows us to estimate the total number of active, private car club users per postcode area. This is, car club users who have used the car club in the 12 months before completing the survey and who use car clubs for private, rather than professional purposes.
- 2.17. In the NR (Norwich) postcode area, there were 83 individuals who stated in the CoMoUK 2024 car club survey that they had used a car club in the last 12 months for private purposes. This equals 1.2% of all active, private users in our UK-wide survey sample. Given that in March 2025, there were around 293,000 active, private car club users in the UK, we estimate that the total number of active, private car club users in the NR postcode area is around 3,600. This is 1.2% of all active, private car club users in the UK.
- 2.18. Using the same method for the other main postcode areas in the Transport East region (IP-Ipswich; CO-Colchester; CM-Chelmsford; SS-Southend-on-Sea), we estimate that the total number of active private car club users is around 4,200 in the entire region. The details of this estimate are shown in Table 2.
- 2.19. The number of car club users in the Transport East region could grow beyond this level if supply of car clubs was expanded under the right policy conditions. Areas for potential car club expansion are discussed in the next section. Policy recommendations are presented at the end of this report.

Table 2: Estimated numbers of active, private car club users in the Transport East region, based on CoMoUK car club survey 2024 and operator metrics

Postcode Area	Postcode Area Name	Active private users CoMoUK car club survey 2024	Share of 2024 car club survey sample	Estimated number of active, private car club users
NR	Norwich	83	1.2%	3,616
IP	Ipswich	2	0.0%	87
CO	Colchester	5	0.1%	218
CM	Chelmsford	3	0.0%	131
SS	Southend-on-Sea	4	0.1%	174
Transport East Total		97	1.4%	4,226
UK Total		6,719	100.0%	292,696 ¹⁰

¹⁰ Based on metrics from all CoMoUK accredited car club operators by March 2025

Car club growth in the Transport East region

- 2.20. From our engagement with car club operators, we know that crucial demographic indicators that drive residents' demand for car clubs are:
- High population density.
 - Low levels of car use for travelling to work.
 - Sociodemographic and cultural characteristics that suggest irregular use of private cars.¹¹
- 2.21. The manifestation of these indicators across the Transport East region is mixed. While the combination of factors that indicate car club demand is often found in urban areas, smaller market towns, where essential daily trips can be done on foot, are also potential growth areas for car clubs.
- 2.22. This is especially true given that daily commuting is no longer necessary for some parts of the working population, following increased levels of working from home and hybrid working. This reduces the necessity for regular journeys that might otherwise have necessitated regular access to a car, which mostly translates into car ownership.
- 2.23. Shortage of parking is also a key factor that drives demand for car clubs. When most essential trips can be made by means other than a car, and parking close to one's home (or regular destination) is inconvenient, car clubs as an alternative to car ownership becomes more attractive. This factor is helped by the bay-to-bay car club model, where the car club vehicle has a fixed space that the vehicle can be returned to at the end of a hire, without the need to look for a parking space.
- 2.24. Figure 5 details the population density by LSOA and the location of current car club vehicles in the region. A higher population density is shown in lighter colours, mainly green and yellow.
- 2.25. Figure 6 shows the share of non-car commuters, including people typically working from home, among the working population aged 16 and over in blue. The map also highlights areas where demographic patterns, according to Output Area Classification (OAC), suggest a "car-light" lifestyle among local residents. These demographic groups are typically marked by lower car ownership and higher uses of active travel and public transport than the UK average.

¹¹ This includes, for instance, 2021 Census Output Area Classification (OAC) groups such as "Multicultural Inner Suburbs" (6c), "Student Living & Professional Footholds" (3a) and "Diverse Educated Urban Singles" (3c) (see: [CDRC: Output Area Classification 2021](#))

Figure 5: Population density and car club supply in the Transport East region

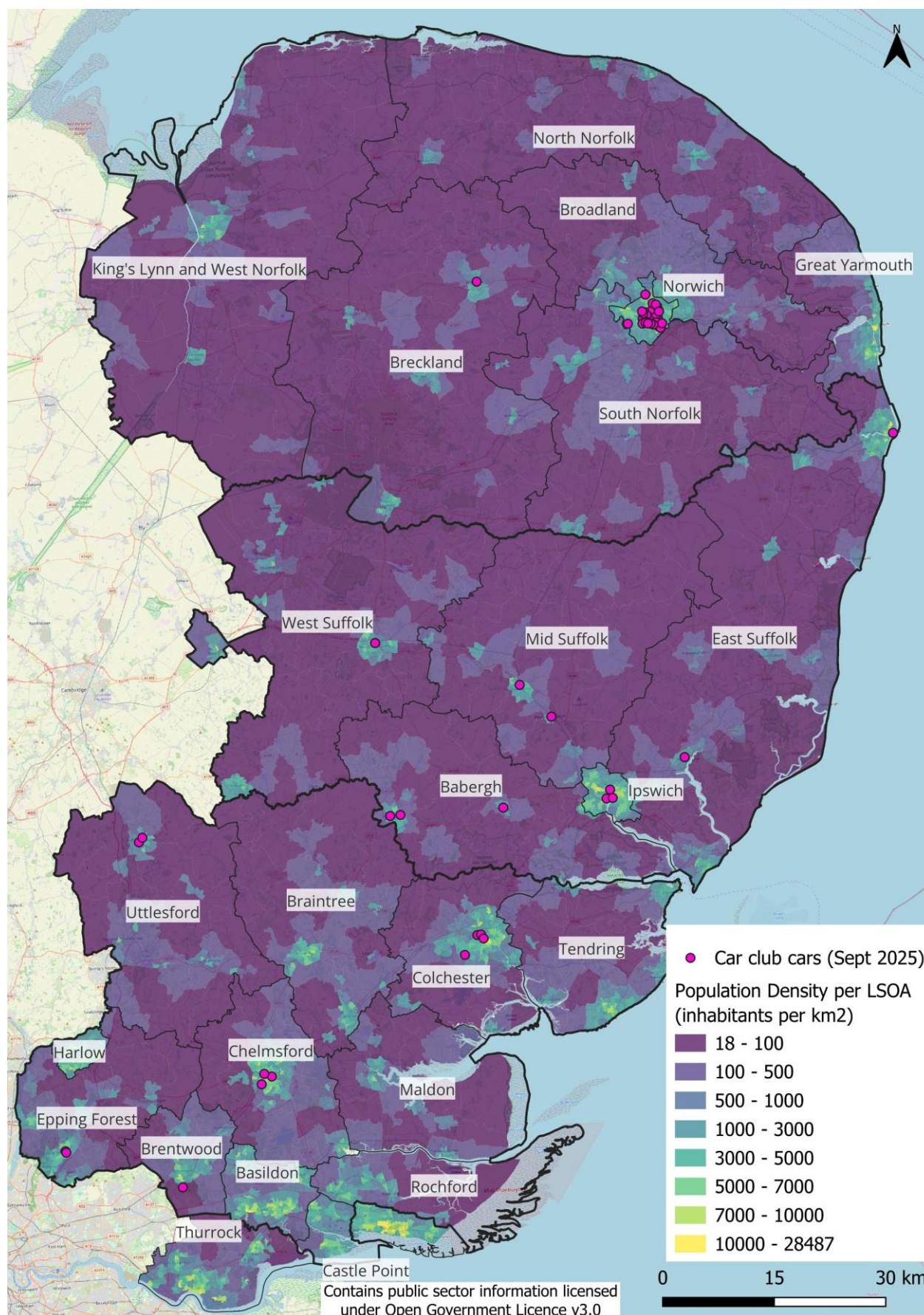
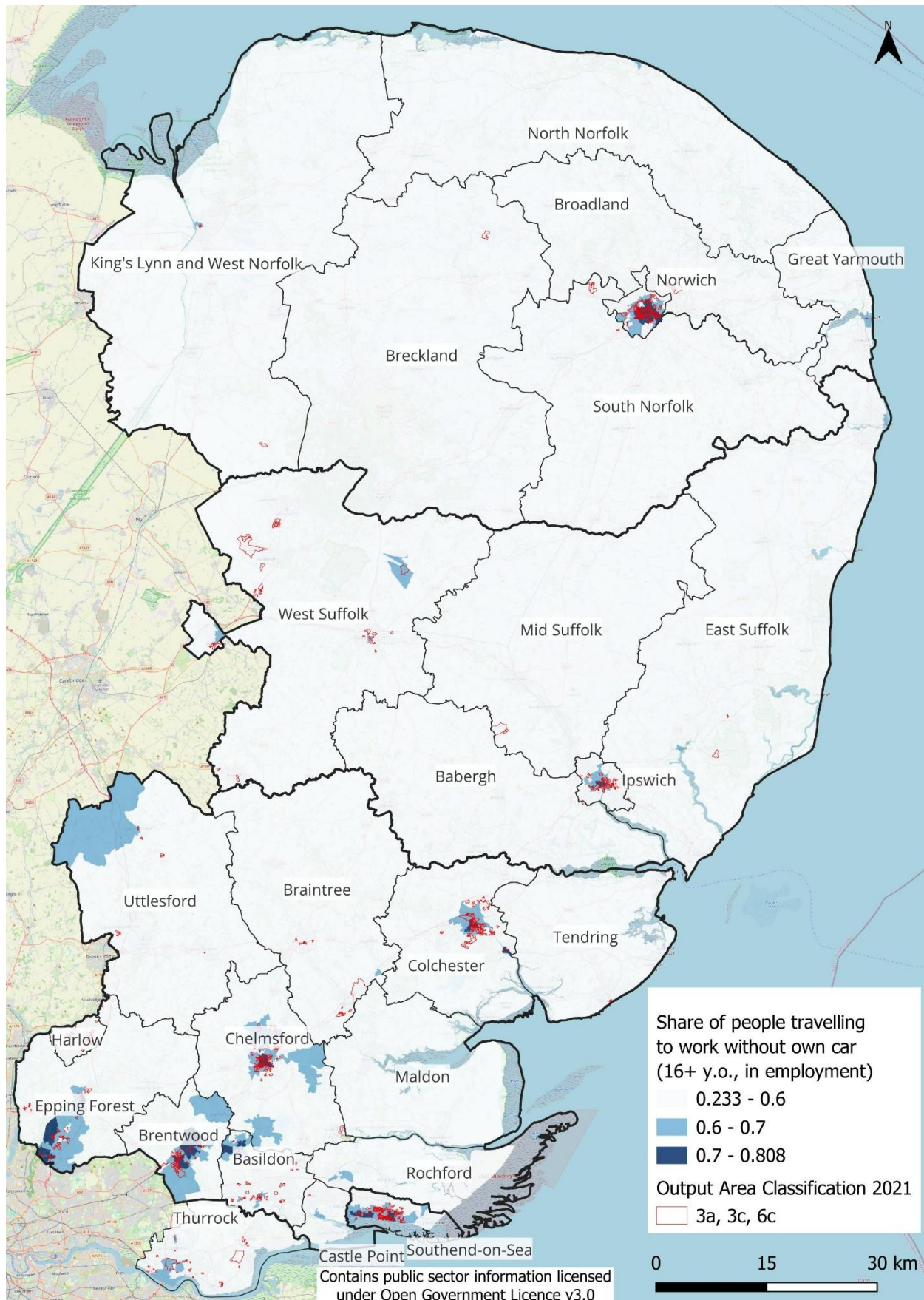


Figure 6: Share of population in employment (aged 16+) who travel to work by non-car means, including working from home and car light lifestyles by OAC 2021



- 2.26. Figure 7, Figure 8 and Figure 9 highlight areas with a very high demand for car clubs in green, areas with a high demand for car clubs in yellow, and areas with a medium demand for car clubs in orange. The maps zoom in on areas where demand for car clubs is particularly concentrated in the Transport East area. The very high to medium categories are marked by high population density and by high levels of non-car commuting. The details defining these categories are summarised in Table 3.

Table 3: Sociodemographic indicators that suggest demand for car club use

Category	Population density	Level of non-car commuting
Very high – green	6,500+ p/km ²	70+%
High – yellow	5,000+ p/km ²	65+%
Medium – orange	4,000+ p/km ²	65+%

- 2.27. Figure 7, Figure 8 and Figure 9 also highlight Output Area Classifications that suggest high amenability to car club use in the population with red boundaries. Existing car club locations are shown as pink dots with black boundaries.
- 2.28. The GIS (geographic information system) analysis presented in the maps below has been complemented by a qualitative analysis of the built environment of potential car club demand areas, carried out in Google Street view. The analyses show that car clubs could be expanded to, or introduced in, the following areas:
- **Norwich:** The already dense coverage with car club vehicles could be expanded to reach into new areas like Thorpe Hamlet or Earlham. The latter would particularly benefit the local student population.
 - **Southend-on-Sea** currently does not have any car club vehicles, but the demographic analysis suggests very high demand in and around the city centre and in residential suburbs like Westcliff or Leigh. In such suburban areas, residents in terraced houses with no designated parking option for private vehicles could be core car club users.
 - **Brentwood** hosts one car club vehicle in a new residential development in the South of the town. Some demand for car clubs can come from residents around the town centre with limited parking options at their own residencies. High and very high demand for car clubs could also be expected around the Brentwood Elizabeth Line station. However, many residential dwellings in this area have ample provisions for private car parking which tends to undermine demand for car clubs.
 - **Epping Forest** shows some potential car club demand around the London Underground Stations of the Central Line (Epping, Debden, Loughton). To capitalise

on this demand, however, parking spaces in the area would have to be reduced to make private car use and ownership less attractive.

- **Chelmsford** is currently served by three car club locations but could extend the offer into other central locations, mainly in the commercial areas around Chelmsford Station and into adjacent residential areas. Car club demand is expected to be highest in those residential areas with parking pressures.
- **Colchester** has four car club locations. Car clubs could be expanded into central residential areas and around Colchester General Hospital.
- **Ipswich** has three current car club locations and potential to grow car club provisions from there. Residential areas around the town centre with limited parking provisions for residents' private cars would be key target areas.

2.29. In addition to the locations that are highlighted in the maps below, potential demand for car clubs has also been identified in the following locations. While car clubs might still be viable in these locations, user numbers will be lower given the smaller population numbers in these towns.

- | | |
|-------------------|------------------|
| • Saffron Walden | • Lowestoft |
| • Newmarket | • Great Yarmouth |
| • Bury St Edmunds | • King's Lynn |

2.30. In areas of high and very high demand, car clubs can typically operate without additional funding when policy and financial incentives encourage the use of car clubs and limit the use of private vehicles.

2.31. One example of a funded car club that operates in an area which is less densely populated than many car clubs is Suffolk's electric vehicle car club.¹² This scheme is funded by Suffolk's Public Sector Leaders, operated by CoWheels and managed by Suffolk County Council. At the time of writing (October 2025), the scheme operates at nine locations, including smaller towns like Stowmarket and Sudbury.

¹² [Suffolk County Council: Electric vehicle car club](#)

Figure 7: Areas of potential car club demand in Norwich

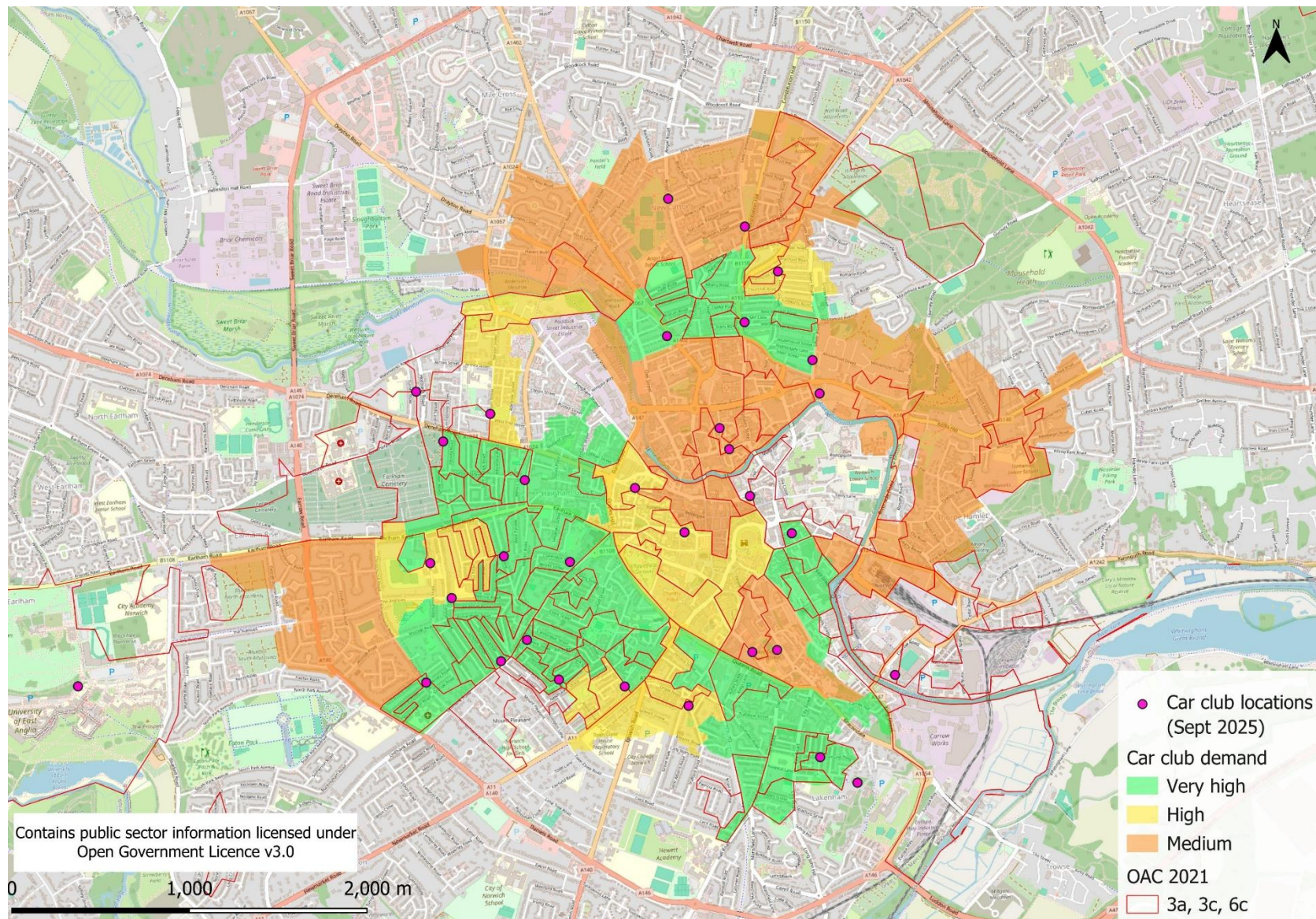


Figure 8: Areas of potential car club demand in South Essex

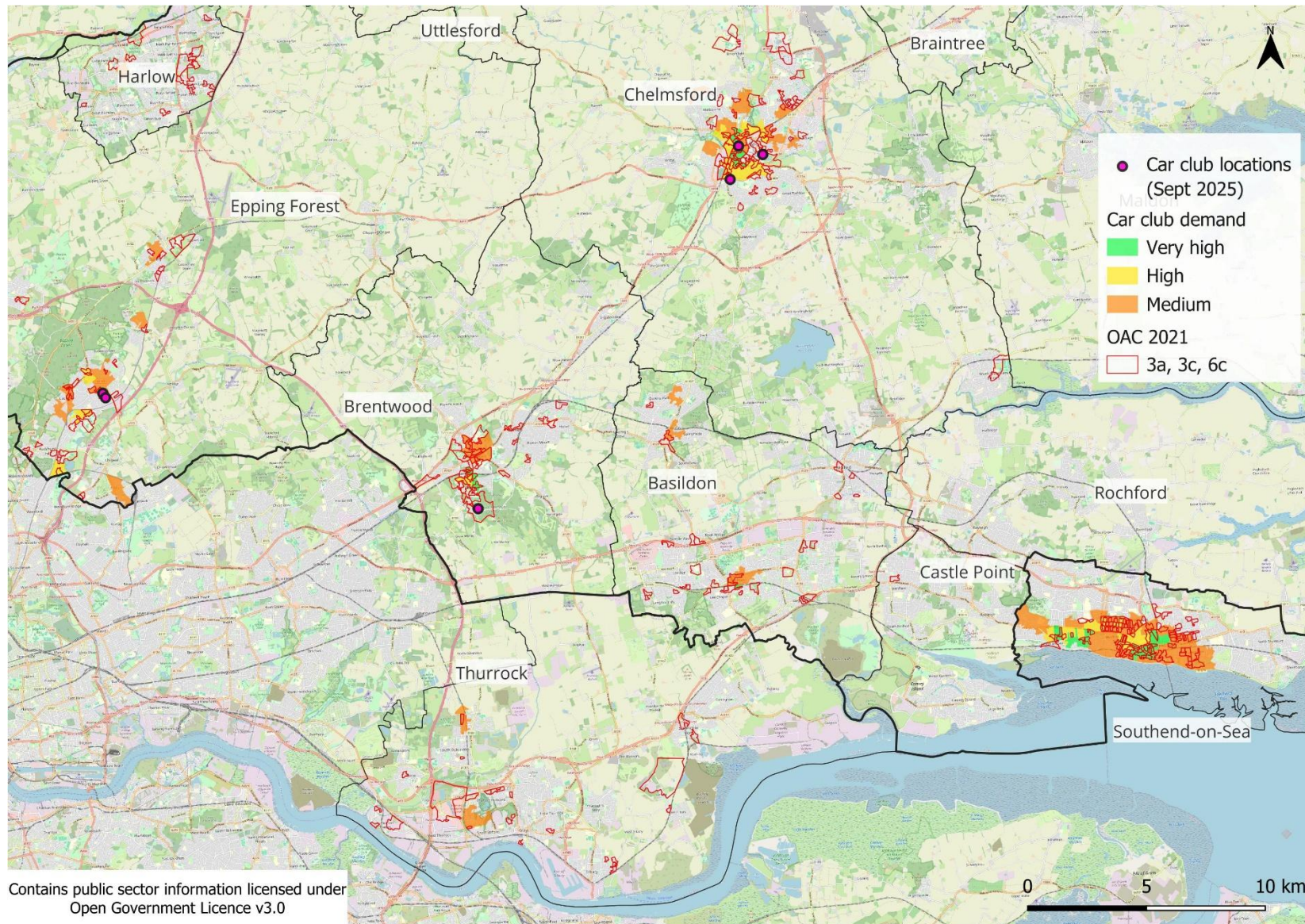
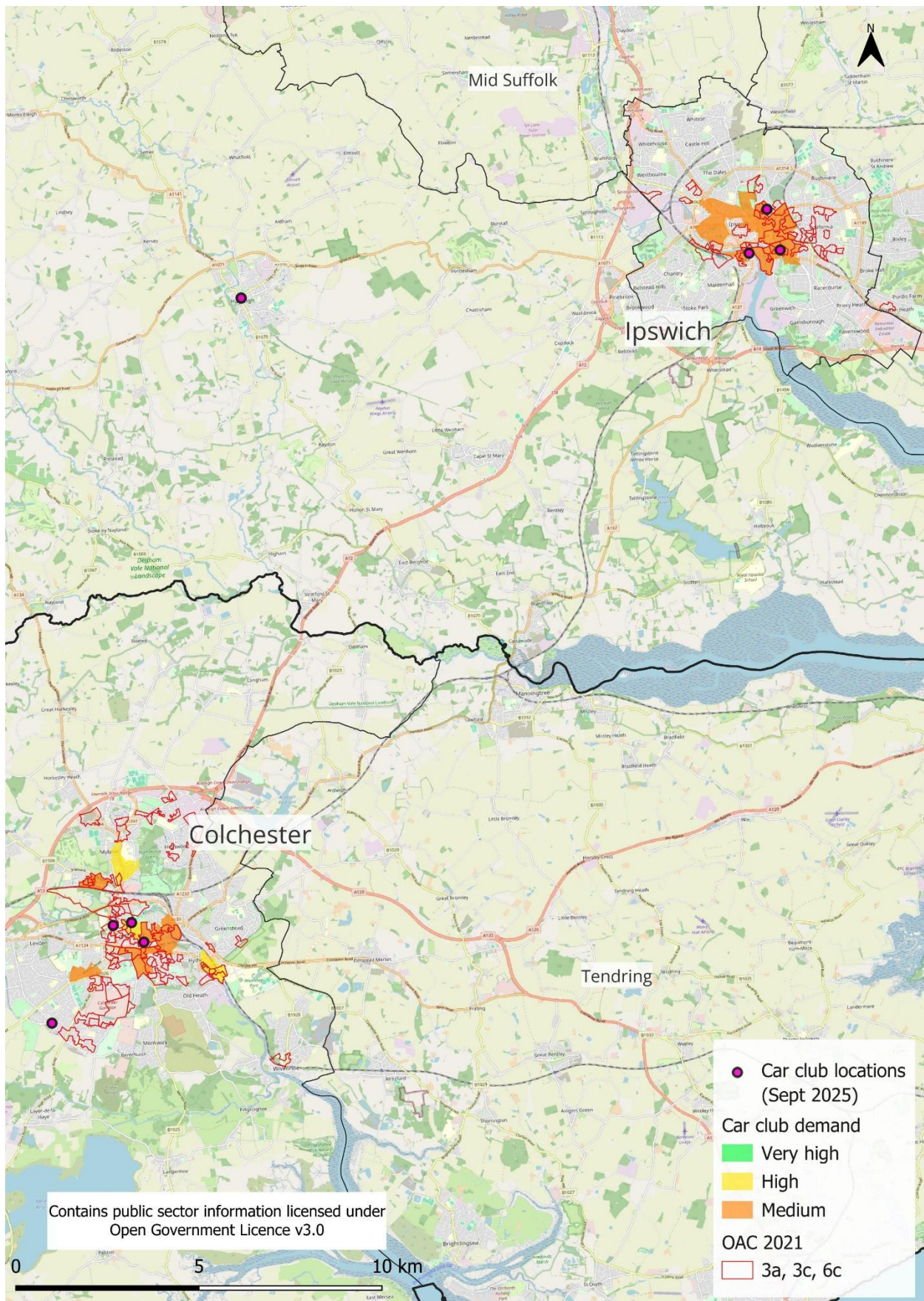


Figure 9: Areas of potential car club demand in Ipswich and Colchester



Car club market engagement

- 2.32. CoMoUK reached out to four accredited car club operators to assess their interest in expanding their operations in the Transport East region. The contacted operators were Enterprise Car Club, CoWheels, Hiyacar and Zipcar.
- 2.33. Since the inquiry was not in relation to a specific opportunity, the responses from operators were limited and only one operator provided a more detailed response. From experience, CoMoUK expects more detailed answers to a market engagement exercise when a contract for car club operations in a high demand area is due to be renewed.

Operator response

- 2.34. The one operator who provided a detailed response stated that car clubs can work outside of major cities when one or more of the following supporting factors are in place:
- **Cooperation with big employers to integrate corporate fleet management and car club operations:** This can take the form of a “blended” car club where vehicles are pre-booked for corporate use during core working hours and available for private use, either by staff only or the wider public, outside these hours. The operator already works with two NHS trusts in Norfolk.
 - **Support from local authorities:** This can take the form of a “blended” car club as described above where council fleet operations are integrated with car club services; or direct funding for the car club itself. The operator noted that underwriting a monthly revenue is the most effective.
- 2.35. The operator further stated that the time span for local communities to adapt to car club use is typically between 8 to 12 months in metropolitan areas and up to 18 months in more rural settings. In this context, it is important that potential users trust the car club enough to consider it a viable alternative to traditional car hire companies and ultimately to car ownership.
- 2.36. On the basis of the above considerations, the operator suggests that there is potential for car clubs in the following locations:
- | | |
|-------------------|-------------------|
| • Framingham | • Harlow |
| • Aldeburgh | • Chelmsford |
| • Southwold | • Brentwood |
| • Norwich | • Basildon |
| • Bury St Edmonds | • Southend-on-Sea |
| • Ipswich | • Romford |
| • Felixstowe | • Tilbury |
| • Colchester | • South Ockendon |
| • Epping | |

Procurement routes

- 2.37. When procuring car club services, CoMoUK recommends working with car club operators which are currently certified by our accreditation scheme.¹³ Accreditation ensures a collectively agreed set of standards is upheld across the industry to maintain the reputation of shared transport schemes. The criteria have been carefully chosen, in consultation with stakeholders, to provide a robust framework whilst not stifling innovation.
- 2.38. Most car clubs in the UK operate without public funding. Although providing some form of public investment or subsidy can allow car club operators to work in areas where vehicles would not otherwise be viable (see operator response above).
- 2.39. Car clubs are commercial services run at the risk of the operator, so they do not need the same detailed procurement processes as other services which are provided for the Council. Specifications, KPIs and contracts should be appropriate to the fact that most car clubs are not a council-run or council-subsidised service.
- 2.40. The appropriate route to car club procurement will partially be determined by the expected demand for car clubs in the area for which the service is being procured.
- In most cities with a population of over 200,000 with favourable conditions for car clubs,¹⁴ there is sufficient demand to support multiple car club operators. Having more than one operator can increase choice of service, support faster growth and increase competition. However, users will typically need more than one app to use all available services and may have to pay more than one registration fee (though this is often waived to join a second scheme).
 - If a car club is expected to cover areas with lower expected demand, e.g. in rural areas, a single operator model is preferable. This allows the car club operator to fund car club vehicles in lower-demand areas with revenues raised in high demand areas.
- 2.41. Depending on the expected demand for car clubs in the area for which the car club is being procured the following procurement routes might be suitable:
- A **licensing process** to create a car club framework to issue parking permits for designated bays on council-owned land to one or more operators under agreed contracts which can be reviewed annually.
- This route is recommended when commissioning multiple car club operators in high demand areas.

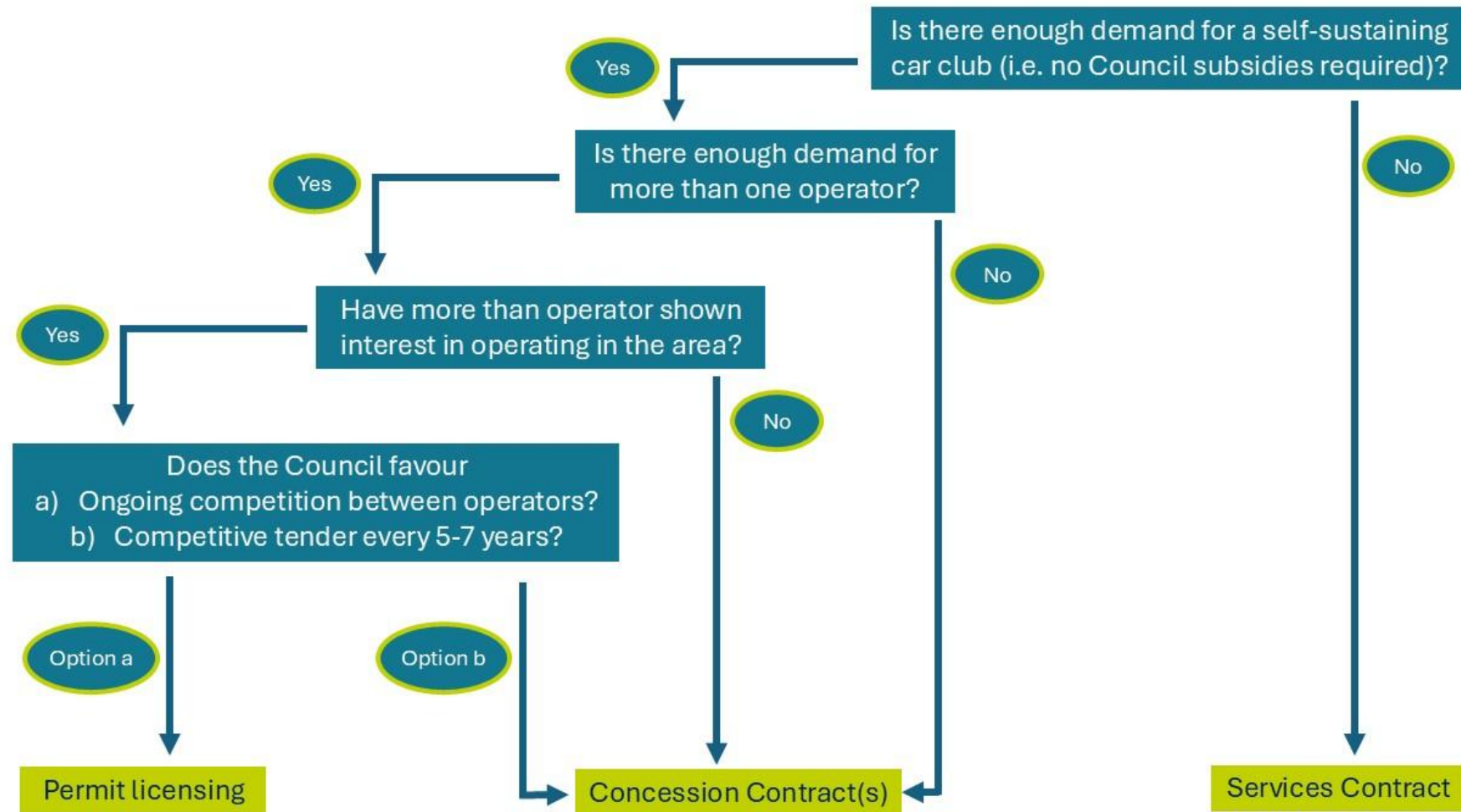
¹³ [CoMoUK: Car club accreditation](#)

¹⁴ Examples for favourable conditions include high population density, low levels of regular car use and others (see growth factors detailed above).

- A **concession contract** which grants permission for an operator to use parking bays on council-owned land. It is appropriate when an authority is not providing any financial support and is instead granting permission to use the on-street spaces through a competitive tender. This route can be used for commissioning one or more car club operator(s) in areas with medium to high demand areas.
- A **services contract** is required for a car club when financial support is being provided to the operator or when fleet services, without publicly available car club services, are procured from the operator. This route is recommended if the Council is prepared to make a substantial financial commitment to one car club operator, e.g. to provide car clubs in low-demand areas.

2.42. Key decisions to consider when choosing a procurement route for car clubs are summarised in Figure 10. More information on car club procurement can be found in the CoMoUK guidance document [Car club commissioning: a quick guide](#).

Figure 10: Key decisions to inform single or multiple operator car club model and commissioning route



3. Lift sharing

Introduction: what is lift sharing?

- 3.1. Lift sharing, or carpooling, is when two or more people share a car for the same trip. Lift sharing hence differs from car clubs in that lift sharing entails sharing a vehicle with other people at the same time, whereas for car clubs different (groups of) users use the same vehicle at different times.
- 3.2. Most lift sharing happens informally between friends, colleagues or family members. 70% of adults engage in informal lift sharing.¹⁵ However, lift sharing can also be supported through digital platforms that help finding matching trips between a driver and potential passengers. In the UK, such platforms include Liftshare or BlaBlaCar.
- 3.3. The legal situation for lift sharing in the UK means that drivers cannot make a profit, but can charge passengers for reasonable expenses.
- 3.4. The key impact of lift sharing on the transport system is that it increases car occupancy by increasing the number of passengers per car. This is crucial since average car occupancy in the UK has fallen from 2 people per car and per trip in the 1960s to 1.55 people per car and per trip across trip purposes in 2024. For commuter and business trips, the average car occupancy in 2024 was only 1.1 people per car.¹⁶

Lift sharing benefits

- 3.5. Increasing car occupancy through lift sharing and, hence, reducing the number of single-occupancy car trips has a number of positive knock-on effects for individual users, the transport system and the environment.
- 3.6. Mobilityways, the company that operates the Liftshare platform,¹⁷ suggests that an average user of Liftshare saves around £1,000 per year when they share their commute.¹⁸
- 3.7. Mobilityways further estimate that each 1% increase in average car occupancy saves 7 billion car kilometres in the UK per year.

¹⁵ [House of Commons: Transport Select Committee: Oral evidence: Car clubs and car sharing, 3 September 2025](#)

¹⁶ [NTS0905: Average car or van occupancy and lone driver rate by trip purpose: England, 2002 onwards](#)

¹⁷ <https://mobilityways.com/>

¹⁸ House of Commons, 3 September 2025 (see above)

- 3.8. If car occupancy increased by 1% each year starting from 2025, traffic and emissions would fall by 20% by 2045. Without lift sharing at its current levels there would be 30% more traffic on UK roads.¹⁹
- 3.9. The reduction in traffic brought about by car sharing benefits a number of stakeholders such as
- employers who need to provide less parking space for their staff
 - highway authorities who can use existing road capacities more efficiently (and can allocate over-capacity to active travel or public transport)
 - residents along roads with reduced traffic who experience a higher quality of life and improved air quality locally.

Lift sharing in the Transport East region

- 3.10. Table 4 details the current levels and future potential of lift sharing in selected areas according to Mobilityways' analysis of data from the 2011 Census.²⁰
- 3.11. The data shows that in the UK overall, 10.1% of commuters share a lift to work while 49.6% travel to work by driving alone. The remaining part of the working population either works from home or walks, cycles or uses public transport to go to work.
- This pattern of travelling to work results in an average car occupancy for travelling to work trips of 1.09.²¹
 - Assuming that all cars have four seats, this means that among all travel to work trips there are over 47 million free car seats that could potentially be taken up by people travelling on similar routes.
 - If car occupancy rose by 5% from 2025 levels, this would result in a reduction of 1.497 million tonnes of CO2 being emitted per year.
- 3.12. Compared to the UK overall, levels of lift sharing to work are slightly lower in the East of England (9.8%) but are higher in Thurrock (10.7%), Norfolk (10.7%) and Suffolk (10.3%). At the level of lower-tier local authorities, levels of lift sharing to work in Ipswich are exceptionally high at 13.6%. The pattern of Ipswich is in line with other cities that have high levels of car dependency and large employers that facilitate lift sharing (compared to levels of lift sharing to work in Peterborough that are at 17%).

¹⁹ Mobilityways Briefing Paper: Carpooling in the UK: HoC Transport Committee, 3 September 2025

²⁰ Mobilityways uses data from the 2011 Census rather than the 2021 Census, due to the latter being impacted by Covid 19-related travel restrictions.

²¹ DfT's National Travel Survey (NTS) and Mobilityways' Commuter Census use different methodologies. This explains the slight difference in car occupancy levels across data sources.

Table 4: Potential of lift sharing from travelling to work in selected areas

(Source: Mobilityways, ONS Census 2011)

Authority	Lift sharing	Driving car alone	Car occupancy	Number of empty seats if 4 seats/car	CO2 saving per year from 5% increase in car occupancy
Units	% of all travel to work trips	% of all travel to work trips	pax/car per trip	Total trips	Tonnes/year
UK	10.1	49.6	1.09	47,137,282.00	1,497,266
East of England	9.8	53.5	1.08	4,853,183.00	153,724
Southend-on-Sea	9.2	43.2	1.1	112,939.00	3,593
Thurrock	10.7	53.3	1.09	131,992.00	4,191
Essex	9.1	52.6	1.08	1,127,394.00	35,653
Norfolk	10.7	55.6	1.09	704,837.00	22,354
Norwich	10.3	39.1	1.12	79,555.00	2,548
Suffolk	10.5	56.7	1.08	634,669.00	20,104
Ipswich	13.6	46.8	1.13	100,821.00	3,241

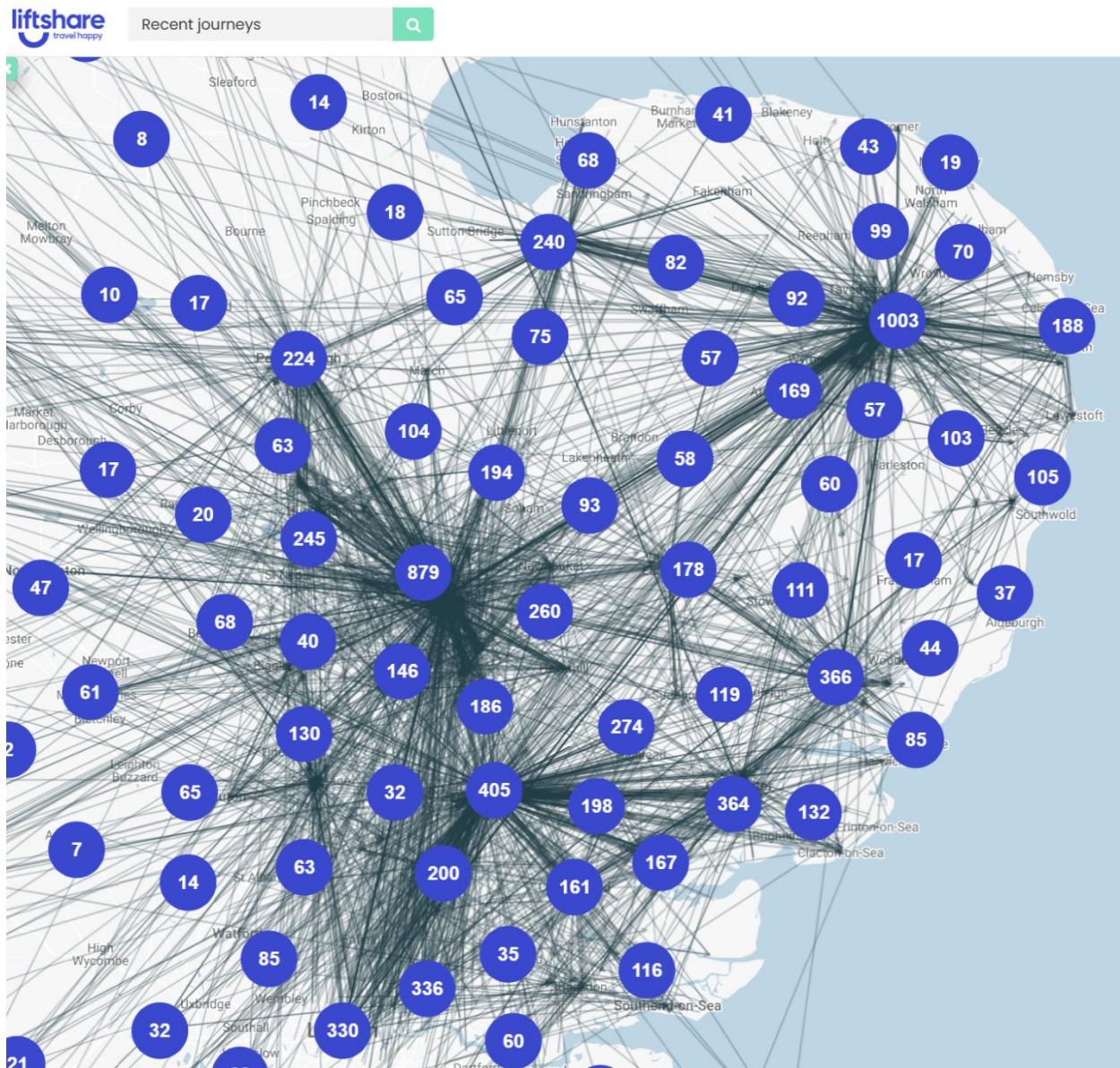
- 3.13. Car occupancy for travel to work trips is very similar (1.08 – 1.09 people per car) across larger areas. However, occupancy is slightly higher in urban settings like in Southend (1.1), Norwich (1.12)²² and Ipswich (1.13).
- 3.14. Overall, in the Transport East region, there are 2.7 million empty car seats among all travel to work trips. If car occupancy for travel to work trips rose by 5%, this would save close to 85,900 tonnes of CO₂ per year.

²² Data collected by Norfolk County Council on car occupancy at 9 sites in Norwich indicates that car occupancy at those locations is slightly higher than that stated in the 2011 Census. Depending on the location, this data shows that the average car occupancy in 2024 was between 1.13 and 1.27 people per car, with an average of 1.18 across all 9 locations.

Lift sharing platforms in the Transport East region

- 3.15. The data analysed above considers all travel to work data, including informal lift sharing. Digital platforms like Liftshare can complement and support informal lift sharing arrangements.
- 3.16. Liftshare is built around networks (called “communities”) of people who can share their trips. Communities are frequently set up in cooperation with a large employer to minimise the number of cars needed for the staff commute. Alternatively, local authorities can also create communities on Liftshare.
- 3.17. One example of a local authority-run Liftshare communities in the Transport East region is “Essex Carshare” that is supported by Essex County Council and has over 2,400 members.
- 3.18. A successful example for an employer supported Liftshare community in the Transport East region is Stansted Airport. Almost 4,500 employees are part of the Liftshare community. Mobilityways estimate that these employees have would have driven 111 million additional miles without Liftshare. This mileage reduction led to a reduction of 24,500 tonnes of CO₂e emissions and total costs savings of £29 million.
- 3.19. Figure 11 demonstrates the origins of the 5,000 most recent trips that were available on Liftshare on 1 December 2025 in the East of England. While a large number of available trips originate in urban centres, a significant share of rides could be shared from smaller towns and rural locations. This shows that lift sharing can play a substantial role in making travelling more sustainable in sparsely populated areas where the necessity for car trips is likely to persist for the foreseeable future.

Figure 11: 5,000 most recent available trips on Liftshare in the East of England as of 1 December 2025 (source: Mobilityways)



Possible actions to support lift sharing

- 3.20. Local authorities can encourage lift sharing through working with large employers or by leveraging their own position as an employer. Steps that employers can take to encourage lift sharing among their staff include:²³
- Making lift sharing visible. This can be done through targeted internal communication that promotes the option of lift sharing and refers to relevant digital platforms where available.
 - Highlighting success of lift sharing within the organisation. This includes personal stories of lift sharing teams in internal communication to raise awareness and willingness of lift share among staff members who don't do so already.
 - Prioritising lift sharing over single occupancy commute. Designated priority car parking for lift sharers can make lift sharing more attractive. Corresponding car park signage also makes lift sharing more visible.
 - Guaranteeing a ride home. If there are problems with lift sharing on the commute, the employer can cover costs of alternative ways to travel, e.g. a taxi ride.
- 3.21. Local authorities can also prioritise lift sharers on council-run car parks by providing priority bays for multiple occupancy vehicles.²⁴

²³ For more details, please see also: [Mobilityways: Best Practice for Large Employers: Maximise Carpool Engagement](#)

²⁴ [House of Commons: Transport Select Committee: Oral evidence: Car clubs and car sharing, 3 September 2025](#)

4. Bike share and shared micromobility

Introduction: bike share and shared micromobility

- 4.1. Bike share describes a scheme where bikes and/or e-bikes are available to multiple users.
- 4.2. The most common model of this in the UK is public bike share where bikes are provided at a self-service basis on-street, and where bike can be unlocked and paid for via an app. The costs are typically time dependent (by the minute or hour), with discounts or bundles available for frequent users or subscribers.
- 4.3. Bike share parking can be organised in the following ways:
 - at designated parking bays, with visual signage but no physical dock;
 - at docking stations, where bikes are attached to a designated stand;
 - free-floating, where bike can be parked anywhere within a designated (GPS controlled) area, in line with local parking regulations;
 - a combination of parking bays and free-floating, where parking bays are typically preferred in densely built-up areas (city centres) and free-floating parking is possible in less densely built-up zones (e.g. residential areas).
- 4.4. Other forms of bike share are workplace pool bikes, loans or lockers that can be community-run and peer-to-peer sharing.

Pedal bikes and e-bikes

- 4.5. There is a strong trend in the UK bike share market to lower the share of available pedal bikes within fleets, and to increase the share of e-bikes. Across all bike share schemes in the UK, 74% of the fleet are now e-bikes and 26% are pedal bikes (as of March 2025).
- 4.6. All operators highlight the benefits of shared e-bikes when compared to shared pedal bikes. Some operators do not provide pedal bikes at all. Benefits of shared e-bikes include:
 - E-bikes attract larger numbers of riders, boosting the utilisation of a shared micromobility.
 - E-bikes are built more robustly than pedal bikes and, hence, have a reduced risk of being vandalised.
 - Given the previous two points, shared e-bikes generate more revenue for the operator and reduce funding required from other sources (e.g. from the council). This effect is magnified by users' higher willingness to pay for shared e-bikes compared to pedal bikes.

Shared e-scooters and shared micromobility

- 4.7. Shared micromobility is an increasingly common umbrella term to jointly refer to bike share and e-scooter share. These shared modes have largely overlapping user groups and use purposes. Typically, the various shared micromobility modes are also offered by the same operators and, hence, can be accessed via the same app at the same or adjacent parking locations.
- 4.8. Operators typically recommend the inclusion of shared e-scooters into micromobility schemes to grow utilisation through a more diversified offer and to guarantee the financial viability of a scheme.
- 4.9. In the UK, e-scooters can currently only be used legally on the public highway as part of the DfT's approved shared e-scooter trials. The first UK trials commenced in 2020 and at the time of writing (October 2025) are set to end in May 2028, although this deadline has already been extended four times.
- 4.10. The Government has indicated that it would like to bring forward primary legislation to legalise e-scooters, but has given no firm commitment on this. Consequently, there is currently no timetable for legalisation. Any legislation is likely to take circa 2 years from start to full implementation.
- 4.11. Local authorities have been able to submit new applications for e-scooter trials from early 2026.²⁵

Shared micromobility benefits

- 4.12. Shared micromobility incentivises active travel. 69% of active users of shared bikes and/or e-scooters cycle more often or much more often since starting to use shared micromobility; this includes 27% of exclusive shared e-scooters users who now cycle more or much more often. 25% of active users of shared bikes and/or e-scooters walk more often or much more often since starting to use shared micromobility.²⁶
- 4.13. Bike share also encourages people to start cycling after long breaks of at least a year or even for the first time ever. In 2024, 47% of all active bike share users stated that bike share had led them to cycle for the first time in at least a year or for the first time ever. 50% said that they were already cycling when they started using bike share, and 3% said that they were not sure. Since 2020, CoMoUK bike share research has consistently found that the split between bike share users who have not cycled in at least a year (if ever) compared to those users who are already cycling is approximately 50:50.

²⁵ [gov.uk: Request a new e-scooter trial](https://www.gov.uk/government/consultations/request-a-new-e-scooter-trial)

²⁶ [Annual Shared Micromobility Report UK 2024](#)

- 4.14. 16% of all bike share trips and 21% of all shared e-scooter trips replace trips that would otherwise have been made by car. Consequently, 61.7kg CO₂e are reduced, on average, by every active shared micromobility user per year, thanks to car miles that are replaced by shared bikes and e-scooters.
- 4.15. Shared micromobility, and particularly shared e-scooters provide access to mobility for individuals on lower incomes. In the income brackets <£10,000, £10,001 to £20,000, and £20,001 to £30,000, between 62% and 65% of all active users are using shared e-scooters at least once a week. In the higher income groups, weekly e-scooter use is less common (see Figure 12).

Figure 12: Percentage of active users in each income group that use e-scooters on at least 1 day per week or more (source: CoMoUK Annual Shared Micromobility Report 2024)



- 4.16. At the same time, one shared micromobility operator who is active in the Transport East region found that in 2025, 36% of potential users named costs as the main barrier for not using shared micromobility. To address this, the operator runs a number of inclusivity initiatives. For instance, they cooperate with JobCentre Plus in Norwich to provide newly placed jobseekers with free access to their vehicles for the first 3 months, and at a reduced rate for another 3 months.²⁷

²⁷ [Beryl: Rider Report 2025](#)

Bike share and shared e-scooters in the Transport East region

4.17. At the time of writing (October 2025) there are three bike share and two e-scooter schemes operating in the TE region. Their details are summarised in Table 5. Only one scheme, in Norwich, integrates shared bikes and e-scooters.²⁸

Table 5: Shared bikes and e-scooter schemes in the Transport East region (October 2025)

Location	Shared bikes	Shared e-scooters	Comments
Norwich	✓	✓	Jointly operated by Beryl, scheme extends into Broadland and South Norfolk
Colchester	✓	x	Operated by Tier-Dott, managed by Colchester City Council
Saffron Walden	✓	x	Operated by App Bike
Chelmsford	x	✓	Jointly operated by Voi, managed by Essex County Council
Braintree	x	✓	

4.18. Table 6 provides the aggregate numbers on active users, vehicle fleet and number of hires of all shared micromobility schemes in the Transport East region. The data refers to the 12 months before data collection. The cut-off date for the collected data was 31 March 2025.

Table 6: Shared micromobility metrics in the Transport East region (March 2025)

	Aggregate numbers of shared micromobility schemes (Norwich, Essex ²⁹ , Colchester, Saffron Walden)
Number of active bike share users*	45,667
Number of active shared e-scooter users*	43,141
Number of shared bikes and e-bikes	695
Number of shared e-scooters	2,827
Number of bike share hires	258,371
Number of e-scooter hires	695,566

* Active users are defined as users who have used or made a financial contribution to the service in the last 12 months.

²⁸ Until August 2025, shared bikes and e-scooters from the same operator (Tier-Dott) were also available in Colchester.

²⁹ This data was collected on the Essex e-scooter trials in March 2025 when the operator was Tier-Dott, and includes numbers from e-scooters that were operated in Colchester.

Future potential of shared micromobility in the Transport East region

- 4.19. Bike share and shared e-scooters have the potential to grow in the Transport East region, mainly through providing shared micromobility services in areas that do not currently have any such schemes.
- 4.20. Existing levels of regular cyclists in an area, e.g. as measured through people who state that they typically travel to work by bike in the Census or surveys, have become a common baseline for estimating the potential for cycling in an area overall.³⁰
- 4.21. CoMoUK has been building on this measurement of the “Propensity to Cycle” and introduced the *density of regular cyclists* in an area as another key variable to estimate the viability of shared micromobility schemes. This is because for a bike share and/or shared e-scooter scheme to be viable, a critical number of users need to be present to regularly share these vehicles.
- 4.22. In consultation with shared micromobility operators and some local authorities, CoMoUK has found that
- in supportive context conditions (e.g. with appropriate cycle infrastructure) around 10 or more regular cyclists per 10 hectares are necessary to support a shared micromobility scheme.
 - 10 hectares is the maximum catchment area for a shared micromobility parking location if these locations are placed at most 300 to 400 metres apart. In most urban areas, a denser network of parking locations will be necessary to meet demand and to avoid unruly parking.
 - The core areas of the most successful shared micromobility schemes have a higher density of regular cyclists; e.g. 20+ per 10 hectares.
- 4.23. Shared micromobility schemes can also work in areas with lower densities of regular cyclists of around 5 regular cyclists per 10 hectares. This is true when
- the area is linked to a more profitable “core” of the operating scheme (e.g. Wymondham is included into Norwich’s bike and e-scooter share scheme).
 - bike share is not organised as an on-street service, but serves for more long-term (e.g. day) hires, and is supported by local community groups and/or local businesses (e.g. bike shops).
- 4.24. The density of regular cyclists cannot only predict the viability of bike share schemes but also of e-scooters. This is because 75% of active e-scooter users in the UK also use bike

³⁰ Lovelace, R., Goodman, A., Aldred, R., Berkoff, N., Abbas, A., & Woodcock, J. (2017). [The Propensity to Cycle Tool: An open source online system for sustainable transport planning](#). *Journal of Transport and Land Use*, 10(1)

share.³¹ The share of e-scooter users who also use bike share would likely be even higher if shared bikes and e-scooters would be both be available in more locations across the UK

4.25. Figure 13, Figure 14 and Figure 15 map out the density of regular cyclists per 10 hectare where the density is above 2 in Norfolk, Suffolk and Essex, respectively. The density of regular cyclists has been calculated from the absolute number of people in an LSOA who stated that they usually cycle to work in the 2021 Census. This number was then divided by the area of the LSOA. Figures 10-12 also show existing bike share and shared e-scooter schemes.

4.26. Figure 13, Figure 14 and Figure 15 show that in addition to the existing shared micromobility schemes in the Transport East region, on-street micromobility services could be viable in the following locations:

- King's Lynn
- Great Yarmouth
- Lowestoft
- Ipswich
- Southend-on-Sea
- Basildon
- Harlow

4.27. Locations where shared micromobility schemes could operate when linked to a bigger, higher demand scheme include:

- Kesgrave and Woodbridge, when linked to a potential scheme in Ipswich.
- Caister-on-Sea and Gorleston-on-Sea, when linked to a potential scheme in Great Yarmouth.

4.28. Locations where shared micromobility schemes could operate when supported by local community groups, businesses and/or other stakeholders include:

- Thetford
- Beccles
- Bury St Edmunds
- Stowmarket
- Newmarket
- Felixstowe
- Clacton-on-Sea

Locations like Felixstowe or Beccles could potentially work together with larger schemes in Ipswich or Lowestoft, respectively. However, the distances between the towns are too big to create one joint operational zone.

4.29. Suffolk County Council applied to participate in the national e-scooter trials and DfT's Micromobility Team has granted first stage approval. An e-scooter trial is being developed for Ipswich and its surrounding area and the procurement of an e-scooter

³¹ [Annual Shared Micromobility Report UK 2024](#)

service provider has commenced. An application to the DfT for final approval of an e-scooter trial in Suffolk must be made and approved before a trial can commence.

Figure 13: Number of regular cyclists per 10 hectare and existing shared micromobility schemes in Norfolk

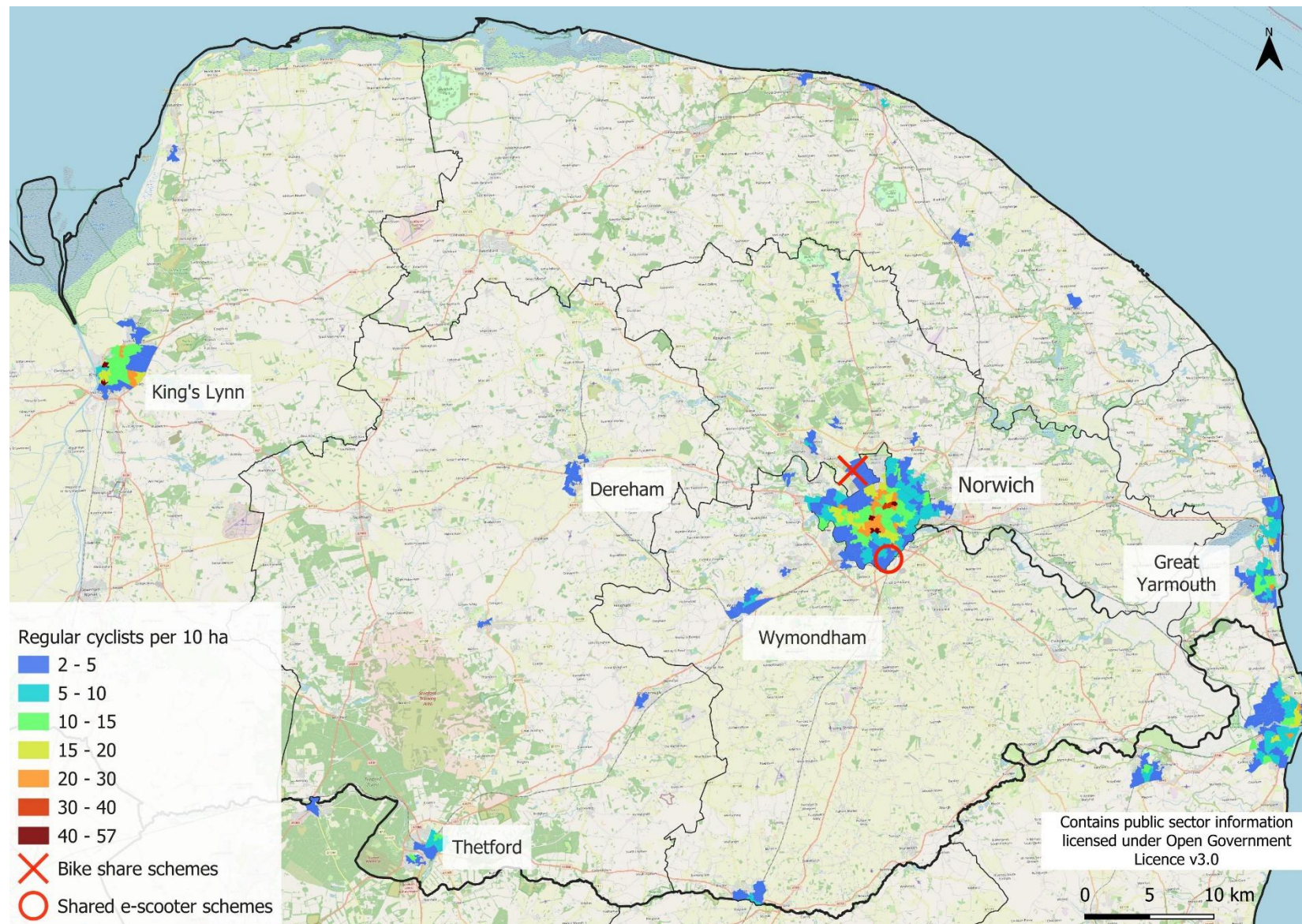


Figure 14: Number of regular cyclists per 10 hectare in Suffolk

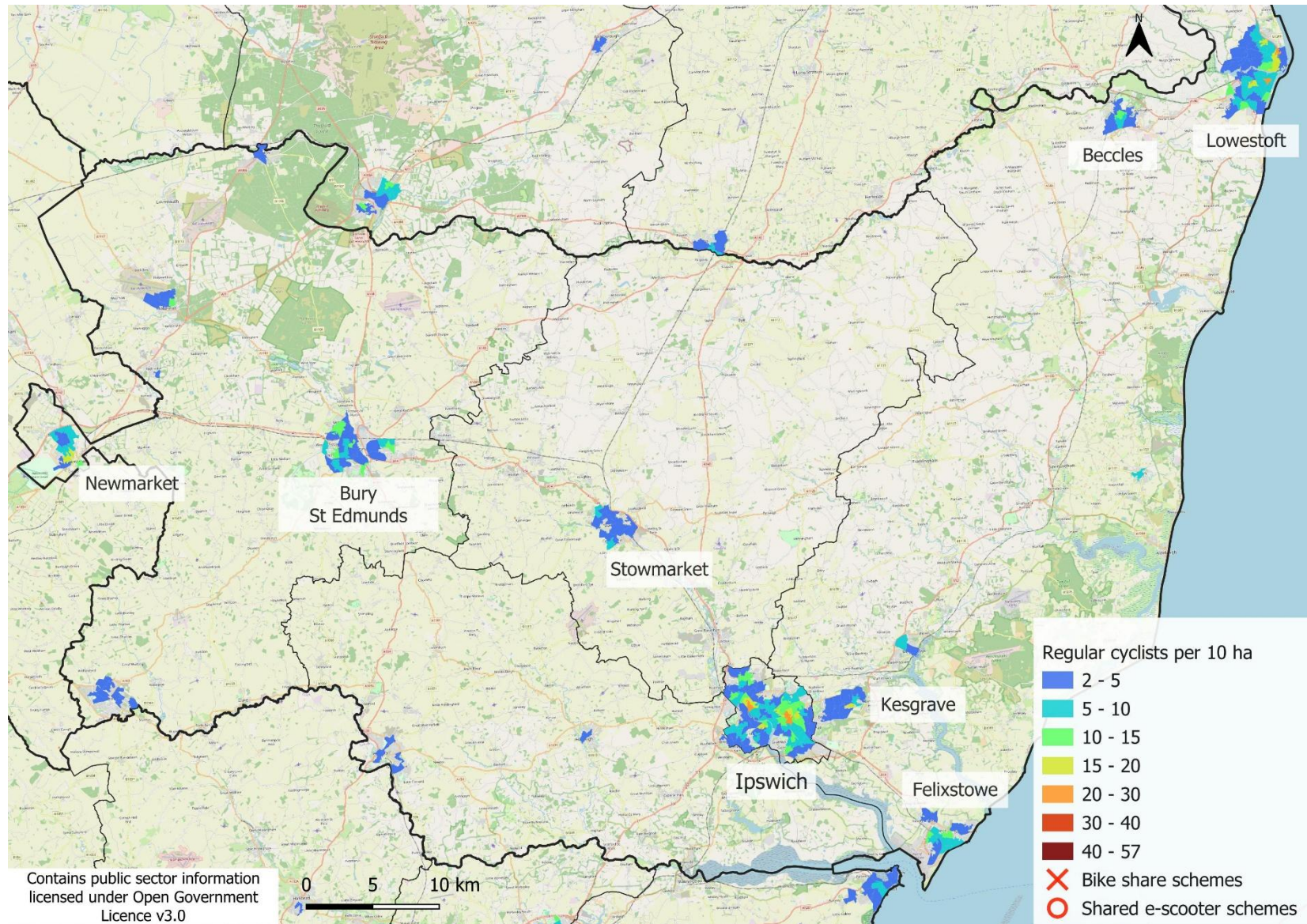
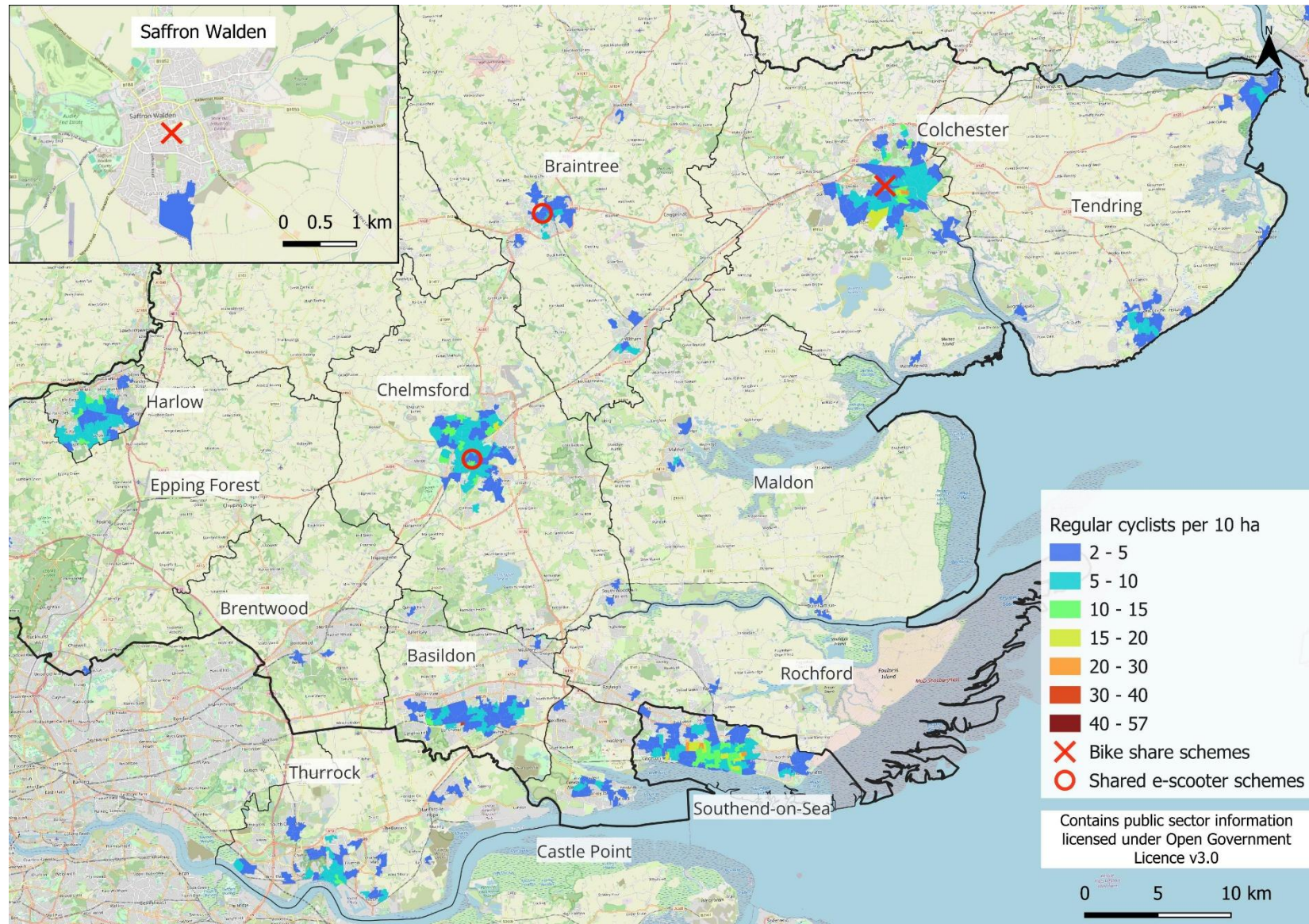


Figure 15: Number of regular cyclists per 10 hectare and existing shared micromobility schemes in Essex



Shared micromobility market engagement

- 4.30. CoMoUK reached out to nine accredited shared micromobility operators to assess their interest in providing or expanding their services in the Transport East region. Six of these operators are active throughout the UK. These include Beryl, Lime, Serco, Dott-Tier, Voi, and Bolt. Operators AppBike, Tier and Forest focus their operations mainly on the South of England and London, respectively. AppBike's local focus includes areas in the Transport East region.

Operator responses

- 4.31. We received responses from two operators that had already been active in the region:
- Beryl who already runs the shared bike and e-scooter scheme in Norwich
 - AppBike who operate small bike share schemes in Saffron Walden, around Stansted Airport and have plans to operate around a shared bike scheme around the Sizewell C nuclear power plant as part of the plants planning obligations. AppBike also have plans to expand their operations from Saffron Walden to other parts of Uttlesford
- 4.32. One operator suggested a ratio of 25 bikes per 10,000 inhabitants for bike share schemes.
- 4.33. Both operators highlighted that many shared micromobility schemes that operated in the Transport East region in the past were closed due to above average levels of theft and vandalism, high levels of car ownership/use and low levels of shared micromobility utilisation. Areas where these factors were particularly inhibiting the successful operation of shared micromobility were, according to the operators: South Essex (Southend, Basildon and Thurrock), Great Yarmouth, Kings Lynn, Lowestoft, Thetford and Bury St Edmunds.
- 4.34. Locations where the operators expected that shared micromobility schemes can work included:
- Ipswich
 - Colchester
 - Chelmsford
 - Harlow (with the recommendation that this would best be part of a larger scheme in Hertfordshire)
- 4.35. Both operators indicated the need for funding for any new shared micromobility schemes in the Transport East region. One operator also stated a preference for up front capital funding, rather than revenue funding for ongoing operations.
- 4.36. One operator emphasised that new residential developments can be used to leverage Section 106 funding to establish a bike share scheme in a development. These schemes can operate on a small scale on a back-to-base level (or as part of a small network) within

a development. According to this operator, incipient back-to-base schemes can be as small as just 5 bikes.

Procurement routes

- 4.37. From ongoing engagement with shared micromobility operators, we know that shared e-scooters typically require less (or no funding) compared to shared e-bikes, given that e-scooters generate higher revenues for operators.
- 4.38. Shared pedal bikes that are not power assisted generate the least revenue for operators and typically require the highest level of additional funding from local authorities. Operators typically recommend phasing out pedal bikes of existing schemes and to replace them with e-bike only or mixed e-bike and e-scooter schemes.
- 4.39. Where there is an investment in a shared micromobility scheme from a local authority, a full tender process is required, advertised on a range of online tender portals. The tender should be for a minimum of three years with potential for and extension (e.g. '3+2' extension clauses).
- 4.40. The procurement specification should focus on the overall outcomes of a scheme and what it seeks to achieve (e.g. increase in number of cycle trips). It should be informed through market engagement and should avoid setting too rigid requirements. The evaluation of bids should have an emphasis on quality and outcomes rather than on price.
- 4.41. Including the need for CoMoUK accreditation for bike share operators in the tender specification helps to maintain industry standards and removes the need to repeat quality standards in the tender form.
- 4.42. Requests for financial contributions from operators should be proportionate, reinvested into measures to support micromobility and kept under review. Revenue share should not be used. Profit share can work in some circumstances. It is best for all parties to explore an 'open book' approach to understand the full financial picture of all involved stakeholders.
- 4.43. Further guidance on scheme design and procurement routes for shared micromobility can be found in the CoMoUK guidance document [Key ingredients for successful shared micromobility](#).

5. Digital Demand Responsive Transport (DDRT) and Community Transport (CT)

Introduction: DDRT and CT as complementary services

- 5.1. Digital Demand Responsive Transport (DDRT) is a mode of shared transport run by vehicles of various sizes, the route and stops of which are determined by passenger demand and managed through dynamic, digital routing systems. DDRT is different from taxis or other pick-up services in that the fare is charged per passenger and not on a per-vehicle basis. DDRT services are also open to the general public and are not restricted to specific groups, such as employees of a certain company, or medical patients.³²
- 5.2. Community Transport (CT) provides flexible and accessible community-led solutions in response to unmet local transport needs. Like DDRT, it uses a range of different vehicles and is frequently also demand responsive. However, a growing number of CT services are scheduled services along fixed routes where conventional bus services are not available. CT differs from DDRT in that it can be restricted to certain user groups such as marginalised and isolated people, older people or people with disabilities.³³
- 5.3. The above definitions show that there is a significant overlap between DDRT and CT. The similarities between DDRT and CT also lead to similar use cases. Both services are frequently applied in areas with insufficient public transport links, such as rural areas or less affluent residential areas at the outskirts of urban centres.
- 5.4. DDRT and CT should be seen as complementary, rather than competing services. The digital technology underpinning DDRT can, in some cases, make CT services more efficient. At the same time, non-digital booking options, the opportunity for more personal interaction and bespoke services for certain user groups create a strong case for CT in its more “conventional” forms.
- 5.5. By definition, CT is always run for a social purpose and never for a profit. While this is not necessarily the case for DDRT, both DDRT and CT are unlikely to operate in areas that are economically viable (even without the aim of generating a profit). In most instances, they both depend on public subsidies, volunteer work and/or donations.

³² [CoMoUK Digital Demand Responsive Transport Report Scotland 2024](#)

³³ [Community Transport Association – CTA: What is community transport?](#)

DDRT and CT in the Transport East region

- 5.6. Figure 16 and Figure 17 display existing DDRT and CT schemes in the Transport East region. Due to the definitional overlaps between DDRT and CT, many schemes could not be categorised as either CT or DDRT.
- 5.7. Additionally, some schemes provided detailed information on the boundaries of their operational zones while other schemes only provided less comprehensive information about possible origins and destinations of trips. Where information on operational boundaries was available, this is depicted as red lines in Figure 16 and Figure 17. Where no information on operational boundaries could be found, DDRT/CT schemes are displayed as red dots at their respective operational base.
- 5.8. Figure 16 shows that many DDRT and CT schemes operate in areas with very high levels of car ownership. The majority of operational zones (where this information was available) covers areas where less than 10% of households do not have access to a car or van. In these areas, DDRT and CT provide an important service for those individuals who cannot or who do not want to drive themselves.
- 5.9. DDRT and CT services can play an important role in breaking patterns of car dependency in areas with otherwise high levels of car ownership. The services can provide alternatives to households owning multiple cars or can make it easier to give up driving at an advanced age.
- 5.10. Figure 17 demonstrates that the operational zones of many DDRT/CT schemes (where this information was available) include large rural areas, many of which are not well connected to a major town or city. In most of these examples, the DDRT/CT services connect these rural areas to a local centre and, in some instances, to more high frequency public transport connections for onward travel. Examples include:
- [BuzzAbout](#) in East Suffolk that connects to Lowestoft, including the railway station;
 - [Mid Suffolk Taxi Bus](#) that connects several locations to Stowmarket and its railway station;
 - [Travel Essex DaRT](#) is split up into multiple operational zones, one of which connects surrounding areas with Sudbury;
 - [Flexibus](#) in Breckland and South Norfolk that links surrounding rural areas to Swaffham.

Figure 16: Existing DDRT and CT schemes in the Transport East region and share of households that do not own a car or van by LSOA

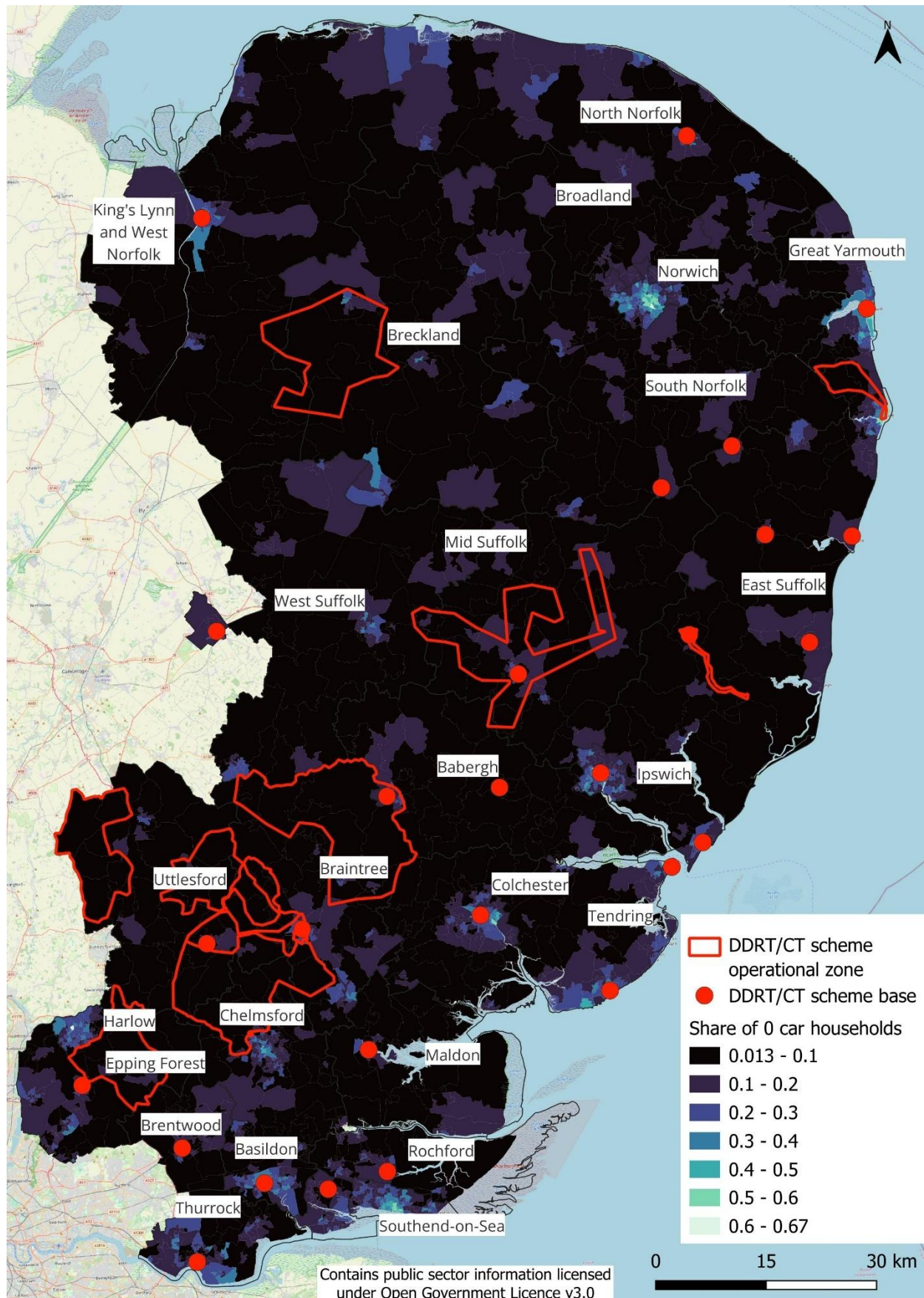
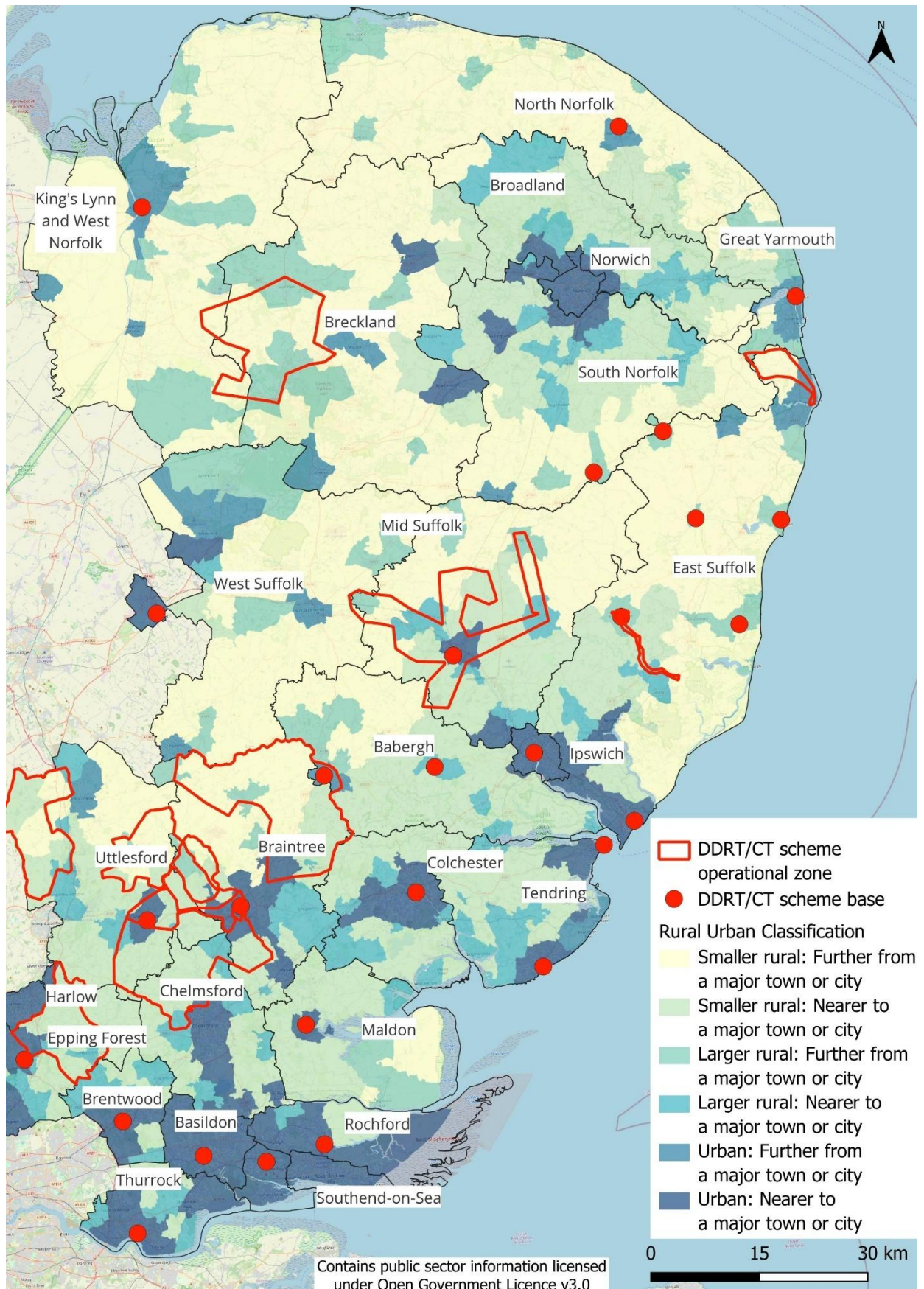


Figure 17: Existing DDRT and CT schemes in the Transport East region and LSOA Rural Urban Classification 2021



Future potential for DDRT and CT services in the Transport East region

- 5.11. Given the incomplete information on the operational areas of many DDRT and CT services in the Transport East region, CoMoUK cannot clearly identify gaps in existing services provisions.
- 5.12. CoMoUK contacted five DDRT technology operators to obtain additional information on potential areas for future schemes, recommended scale for operations and necessary steps to procurement. The contacted operators were The Routing Company, Padam, Ioki, Nemi and Via

Operator response on service design

- 5.13. CoMoUK only received a response from one operator but expects that more responses would have been received if a specific opportunity for (a) DDRT scheme(s) had been advertised.
- 5.14. The operator who responded indicated that identifying potential future DDRT schemes would require a detailed analysis of existing fixed route bus services, their patronage, performance and quality of service.
- 5.15. Based on the analysis of existing bus services, demand for DDRT schemes can be identified in two ways, depending on the aim of the prospective scheme.³⁴
 - A DDRT scheme can fill in the gaps in an area with strong existing bus routes and potentially feed into the existing bus network.
 - The DDRT scheme can replace under-performing bus routes to allow for more flexible operations than a fixed-route bus service.
- 5.16. The operator recommended that potential DDRT schemes are coordinated at the level of local government who manages the funding for the scheme. A strong governance structure for the DDRT scheme should be established at the outset of the scheme to facilitate swift decisions if details of the service delivery need to be modified once the scheme is operational (e.g. changes of service boundaries, operational hours). While local stakeholders such as Transport East or lower-tier local authorities should be integrated into decision making on a DDRT schemes, this should not impede flexible service delivery.

³⁴ The collection and analysis of data on fixed route bus services was beyond the scope of this project.

Procurement and operation of DDRT services

5.17. The operator who responded to our market engagement exercise also provided recommendations for the procurement of DDRT services. The recommended steps are presented in this section with complementary information from CoMoUK:

- **Specification:** In a first step, an in-depth analysis of travel patterns and existing public transport services is required to identify the scope for a DDRT scheme, including service area(s), number of vehicles, specification of vehicles, operating model (e.g. virtual bus stops or door-to-door service).
- **Funding:** Most DDRT services are not financially self-sufficient. Funding should be secured when there is a strong business case for a specific DDRT scheme. Possible funding sources could include Local Transport Grants, which are allocated to each Local Authority.³⁵
- **Procurement:** UK local authorities increasingly procure DDRT services as part of a comprehensive package that includes a bus operator, the DDRT software and customer service provisions (call centre). These services can also be procured separately.
- **Mobilisation:** The mobilisation of the services typically takes 8 to 12 weeks from the completion of the contract. This phase includes steps such as providing the required vehicles, configuring the software, training, testing, marketing and promoting the service. Operators have, in other instances, emphasised that face-to-face contact with potential customers has been a highly successful marketing tool.
- **Service launch:** This should also be accompanied by relevant marketing campaigns, possibly be attended by local celebrities to create news coverage.
- **Post-launch support:** During the lifetime of the contract, the Council(s), operators and technology providers should be working collaboratively to review the service performance and determining ways to continually improve it. This should be done under pre-agreed governance structures. Data-based adjustments of the service can include changes to service hours, number of vehicles or boundaries of operational zones.

³⁵ <https://www.gov.uk/government/publications/local-transport-grant-allocations>

6. Conclusions and Recommendations

- 6.1. The above analysis demonstrates that various shared transport modes are viable in the Transport East region. The viability of each mode, however, depends on factors such as population density, existing travel patterns and available alternatives to private car use.
- 6.2. In simplified terms, this study found that car clubs and shared micromobility is mainly viable in densely populated areas with low levels of existing car use and ownership. However, some existing examples like the bike share scheme in Saffron Walden or the lack of a successful shared micromobility scheme in Southend-on-Sea demonstrate that more in-depth analyses would be needed before pursuing a car club or shared micromobility scheme in a specific location.
- 6.3. Likewise, Digital Demand Response Transport (DDRT) or Community Transport (CT) schemes are mostly viable in rural areas where the operation of bus services or other public transport on fixed routes and schedules is not viable. However, demand-responsive transport schemes should not be limited to rural areas but should connect these with regional centres to enable onwards journeys to present a viable alternative to car use for a range of trip purposes.
- 6.4. To successfully establish and grow shared transport in the Transport East region, the following recommendations should be taken into account.

Car sharing recommendations

- 6.5. Car sharing models in the TE region should be back-to-bay (B2B) and focus on the locations highlighted in Section 2 on car clubs. Peer to peer car sharing could be used to complement this offer.
- 6.6. Local authorities that want to set up a car sharing scheme should engage with council officers in those authorities that already operate a successful car club (e.g. Norfolk or Suffolk County Council).
- 6.7. For car clubs to be successful across different geographies, including in rural areas, the council should work with the appointed operator(s) to integrate its own fleet into a “blended” car club where council vehicles are managed by the car club operator and vehicles are available to the public outside of core working hours
 - Councils should also work with large employers in the area to integrate their corporate fleets into the local car club offer.
 - Councils should draw on existing collaborations between car clubs and large employers in the region (e.g. NHS Trusts).

- 6.8. Car clubs should be considered as a key travel option in all new developments (residential, commercial or mixed). Private car parking ratios at new developments should be kept at a minimum and developers should be given the opportunity to provide less parking if they provide car club vehicles instead. In its initial phase, car clubs at new developments can be funded via Section 106 contributions.
- 6.9. Applications for Local Electric Vehicle Infrastructure (LEVI) funding should include designated funds for car club charge points. However, due to the high operational costs of electric vehicles (EVs) in car clubs, councils' expectations with regards to EVs in car clubs should be proportionate and should not impede the rollout of car clubs into new areas.

Lift sharing recommendations

- 6.10. Local authorities should promote lift sharing in their communication with residents and local employers. Establishing a lift sharing network on a digital platform can help match journeys for lift sharing.
- 6.11. High occupancy car trips should be treated preferentially compared to single occupancy ones. Local authorities should consider options for high occupancy cars to use dedicated lanes (e.g. bus or taxi lanes) and to be eligible for preferential parking.
- 6.12. Councils should also work with large employers to increase car occupancy for commuter trips by taking similar measures.

Shared micromobility recommendations

- 6.13. Local authorities in the Transport East region that wish to establish a new shared micromobility scheme should cooperate with those councils that already operate successful schemes (e.g. Norfolk County Council, Uttlesford District Council) to maximise knowledge exchange.
- 6.14. To establish a successful and durable shared micromobility scheme, local authorities should contribute to the costs of scheme. A tender for a shared micromobility scheme should:
- Be for a minimum of three years with potential extension.
 - Focus on the overall outcomes for a scheme and what it seeks to achieve.
 - Be informed through market engagement and avoid setting specific non-negotiable set requirements.
 - Emphasise quality and outcomes rather than price.

- Specify the need for CoMoUK accreditation to maintain industry standards and remove the need to repeat accreditation criteria in the tender form.
- 6.15. Possible ways to cover the costs of a shared micromobility include developer contributions through Section 106 funding or sponsorship where vehicles (and, where applicable) docking stations are branded in line with a sponsor's requirements (e.g. "Santander Bikes").
- 6.16. There should be close cooperation between the local council that procures a scheme, the shared micromobility operator, local community groups and the police to minimise levels of vandalism, and to create a sense of ownership of the shared vehicles in the community.

DDRT recommendations

- 6.17. To identify the scope of potential new DDRT schemes, or to recalibrate the operations of existing schemes, interested local authorities should carry out an in-depth analysis of their existing bus services.
- 6.18. Local authorities should define the purpose of a potential DDRT scheme before going out to the market. Purposes of a DDRT scheme could be to complement (feed into) existing bus services or to replace existing under-performing bus routes.
- 6.19. Councils should investigate funding sources to guarantee that DDRT offers a service that meets the needs of end users (e.g. appropriate operating hours).
- 6.20. Councils should agree governance structures for DDRT services that allow for flexible adjustments to the service (e.g. operational zone boundaries) in line with operational requirements. The operators point of contact within the council should be clearly defined.

Recommendations across all shared transport modes

- 6.21. All shared transport modes analysed in this report are an alternative to single occupancy, private car use. Shared modes do not compete with public transport but complement it to create a sustainable transport offer that meets diverse mobility needs.
- 6.22. Shared transport and public transport offers should be thought of together and integrated at crucial transport nodes or mobility hubs. CoMoUK has a range of guidance on modal integration at mobility hubs: <https://www.como.org.uk/mobility-hubs/overview-and-benefits>.

- 6.23. Authorities should also consider the digital integration of public and shared transport services in Mobility as a Service (MaaS) app.
- 6.24. Shared transport services should be made visible and local authorities should promote them in their day-to-day communication with citizens. Where authorities pursue bus franchising, CoMoUK recommends establishing a unified, regional, sustainable travel brand that includes public and shared transport.
- 6.25. Sustainable transport offers will be most successful if the true cost of private car use is obvious to users. CoMoUK recommends the introduction of resident parking permits in all densely populated areas and the renewal of permits in short intervals (e.g. quarterly) to encourage drivers to consider alternatives to car use.
- 6.26. CoMoUK also recommends maximum, rather than minimum, parking requirements at new developments. Parking spaces should be located at the edge of a new development, not in front of residential units, to increase the viability of sustainable modes and to remove cars from communal areas of the development. In city centres, the parking ratio should be lower than one parking space per residential unit and parking regulations should be enforced.

Local Authority Considerations Checklist

Strategic Planning & Integration

- Review the role of shared transport in Local Transport Plans and other policy documents: Are they considered strong, viable alternatives to single-occupancy private car use? Are there plans to integrate shared transport with public transport and active travel initiatives?

Promotion

- Promote shared transport services through consistent messaging and, where possible, unified sustainable travel branding. Make sure that potential users of shared transport know what options are available to them.

Partnerships & Knowledge Sharing

- Engage early with councils operating successful schemes (e.g., Norwich, Suffolk, Uttlesford) for operational lessons and contracting models.
- Work closely with large employers (including NHS Trusts) to support blended car clubs and lift sharing incentives, and workplace travel initiatives.
- Maintain strong relationships with operators, community groups and police to reduce vandalism and improve scheme stewardship.

Spatial Planning, Parking & New developments

- Require shared transport options in new developments. Allow reduced parking ratios at developments where private car use is not necessary and where car clubs are available.
- Apply maximum (not minimum) parking standards and use frequent renewal of residential parking permits to encourage mode shift.
- Use Section 106 contributions to support start-up costs for car clubs or shared micromobility.

Funding & Procurement

- Review what funding routes are available to support a shared micromobility or DDRT scheme.
- Review what funding is available for car clubs that meet the Council's fleet needs or that operate in areas that are not profitable for the car club operator.
- Include car club charge points in LEVI funding bids.
- In procurement for all shared transport modes, prioritise outcomes, flexibility, and quality over rigid specification or lowest price.
- Require CoMoUK accreditation for car clubs and bike share schemes.