

# Yorkshire & Humber Regional Rural Car Share Feasibility Study

## Key Findings, Conclusions & Recommendations

Jon Parker, Jim Bradley, Emilie van de Graaff &  
Rebecca Johnson

# Yorkshire & Humber Regional Rural Car Share Feasibility Study

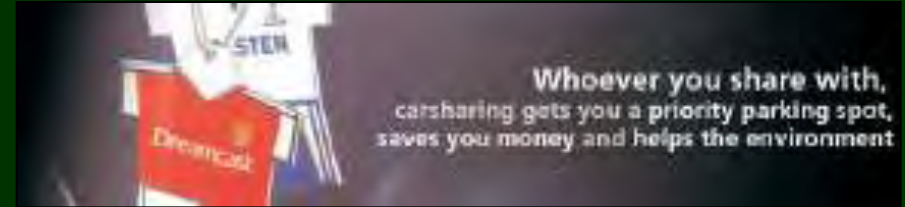
## Introduction & Background

# What the (existing) research tells us?



- Success comes in many shapes and sizes:
  - Supporting measures (incl. infrastructure)
  - Co-ordinator essential
  - Perceived barriers are many (but not insurmountable)
  - Closed and open schemes work differently
  - Rural diversity presents challenges and opportunities
- Car sharing not a technical fix (user needs)

# Many elements of success .....



**Car sharing to MetroCentre**

**SAVE UP TO £250!**

**It's that MetroCentre saving feeling!**

A guide for staff on the benefits of joining MetroCentre's Car Sharing Scheme

- Follow MetroCentre Staff DiscoverCard Application Form & Car Share Scheme Membership Application Form

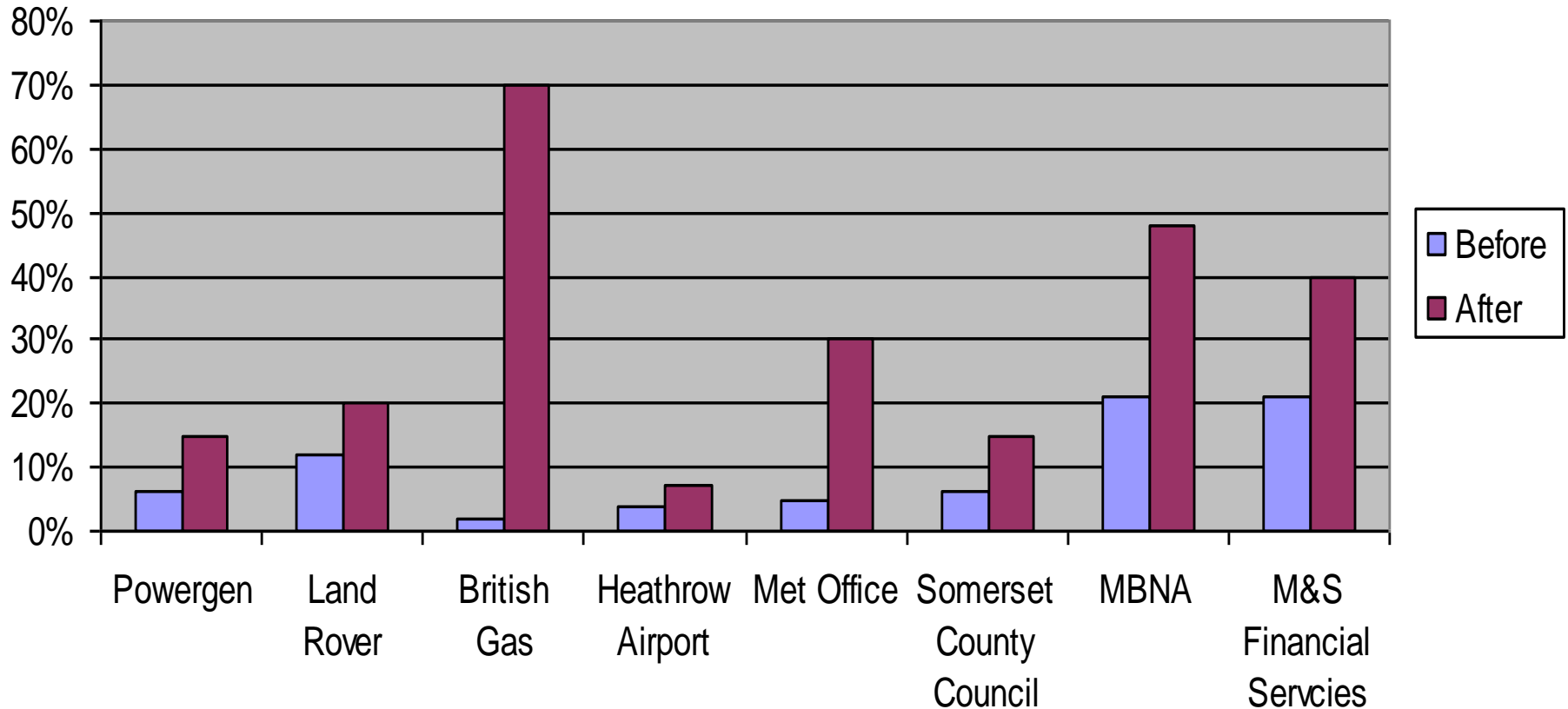


**Every day there are ten million empty seats on the road**  
 Source: Are you doing your bit? campaign



# Car sharing can work ....

## Change in Multi Occupancy Car Use



# Background to study

- Fluctuations in car occupancy rates ...

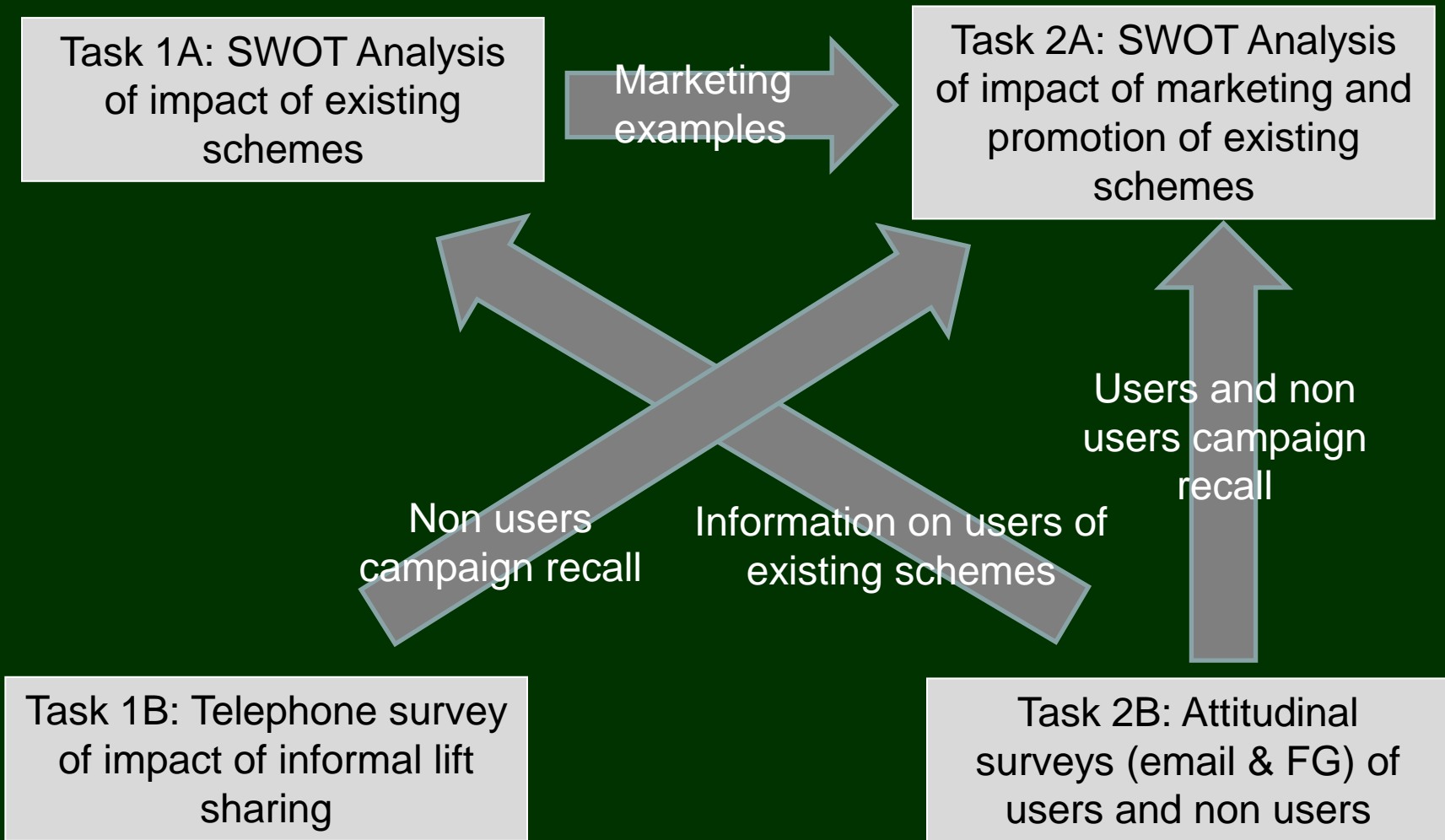


# The challenge for the study

- Articulate current uptake (amongst different groups)
- Understanding what really makes car sharing work
- In the specific rural context
- How to maximise future uptake



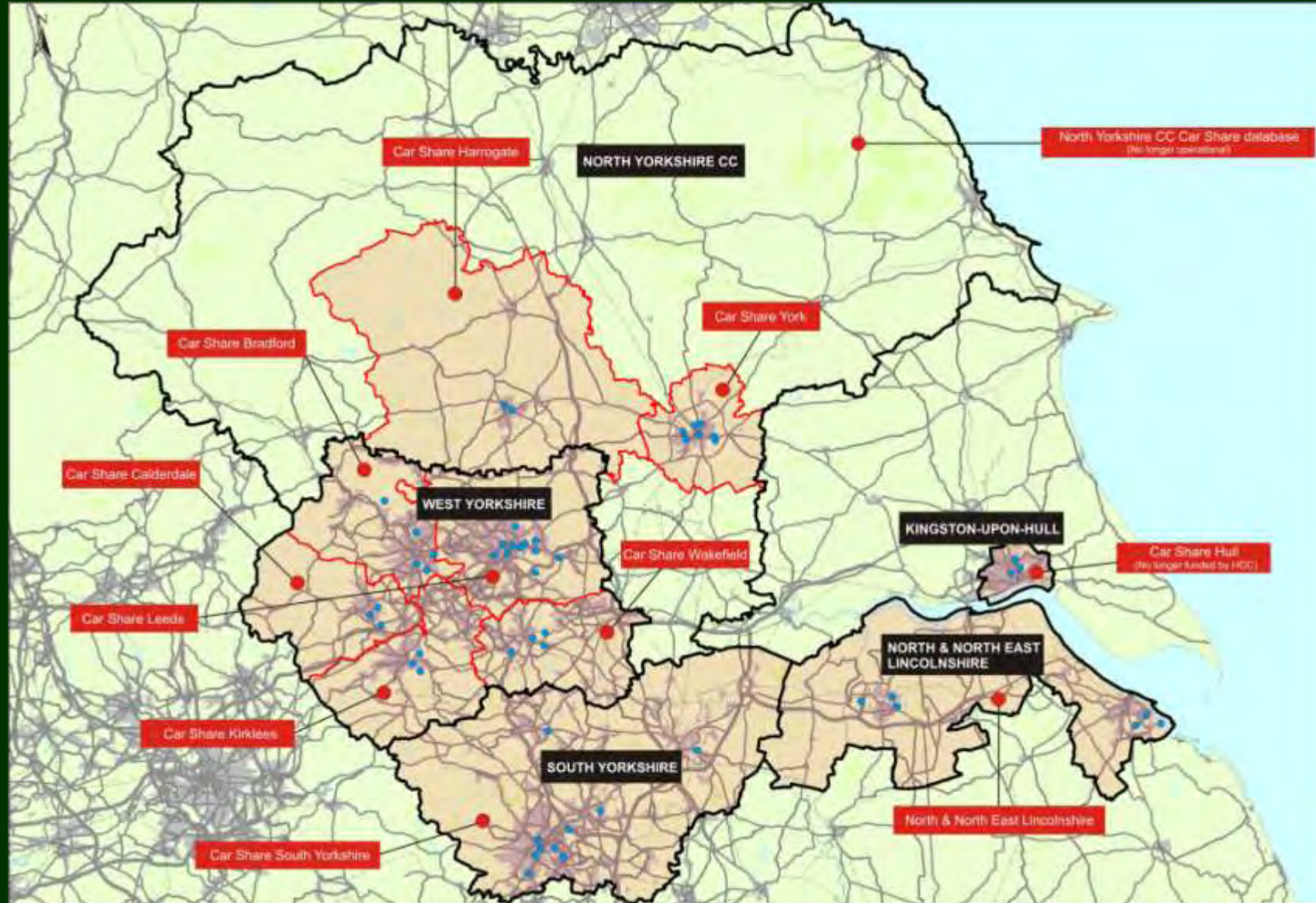
# Study structure



# Overview of existing schemes

- Market dominated by Liftshare
- Approx. 70 schemes (10 'umbrella' schemes)
- Approx 18,000 members
- 0.5% of 16-74 year olds
- Contact rates 29% & 47%
- Start up / annual costs £4,000 – £5,000
- Closed group: £200 - £300 pa
- Co-ordinators typically 1-2 days per month
- Variable skills and knowledge of software
- Wide range of marketing and incentives

# Overview of existing schemes



# Yorkshire & Humber Regional Rural Car Share Feasibility Study

## Quantitative Research Findings

# Research Background & Objectives

- Two key quantitative surveys:
  1. A telephone survey of 405 informal car sharers
  2. An online survey of 370 existing users of formal car sharing schemes
- Main objectives:
  - To assess the current profile of informal and formal car sharing in the region
  - To assess the current impact of informal and formal sharing in the region
  - To assess the potential for and barriers to expanding the reach of this provision by linking it to new or existing schemes

# Definitions of informal & formal car sharers

- Informal car sharers: Not registered as a member of a formal car sharing scheme but share a journey by car once a month or more often with at least one other person that does not live in the same household
- Formal car sharers: Anyone registered with an existing car sharing scheme in the region



# Telephone survey methodology

- Telephone survey of residents of 4 areas representing contrasting rural environments:
  - Remote Rural; Settlements within the North Yorkshire Moors National Park.
  - Pennine – West Yorkshire; Settlements within the rural area to the northeast of Barnsley but not including Rural Service Centres.
  - Coastal Areas; Settlements on the coast within the former borough of Holderness within the East Riding of Yorkshire.
  - Accessible Rural Areas; Settlements within Harrogate District to the south of Harrogate.

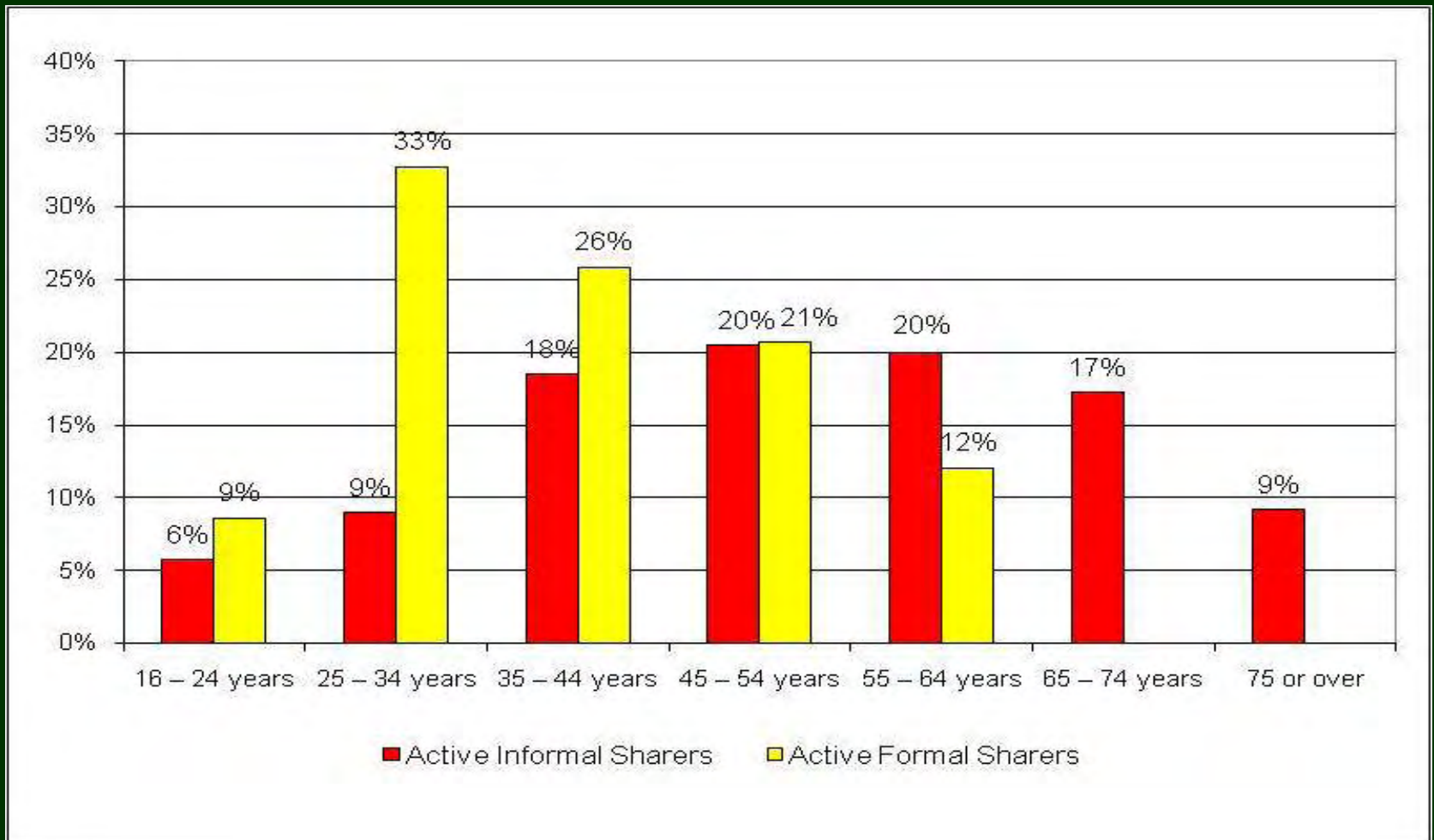
# Online survey methodology

- Online survey administered to members of the following Liftshare schemes via an emailed survey web link:
  - Carshare Leeds
  - Calderdale Carshare
  - East Riding Carshare
  - Carshare South Yorkshire
  - Harrogate Carshare
  - Carshare York

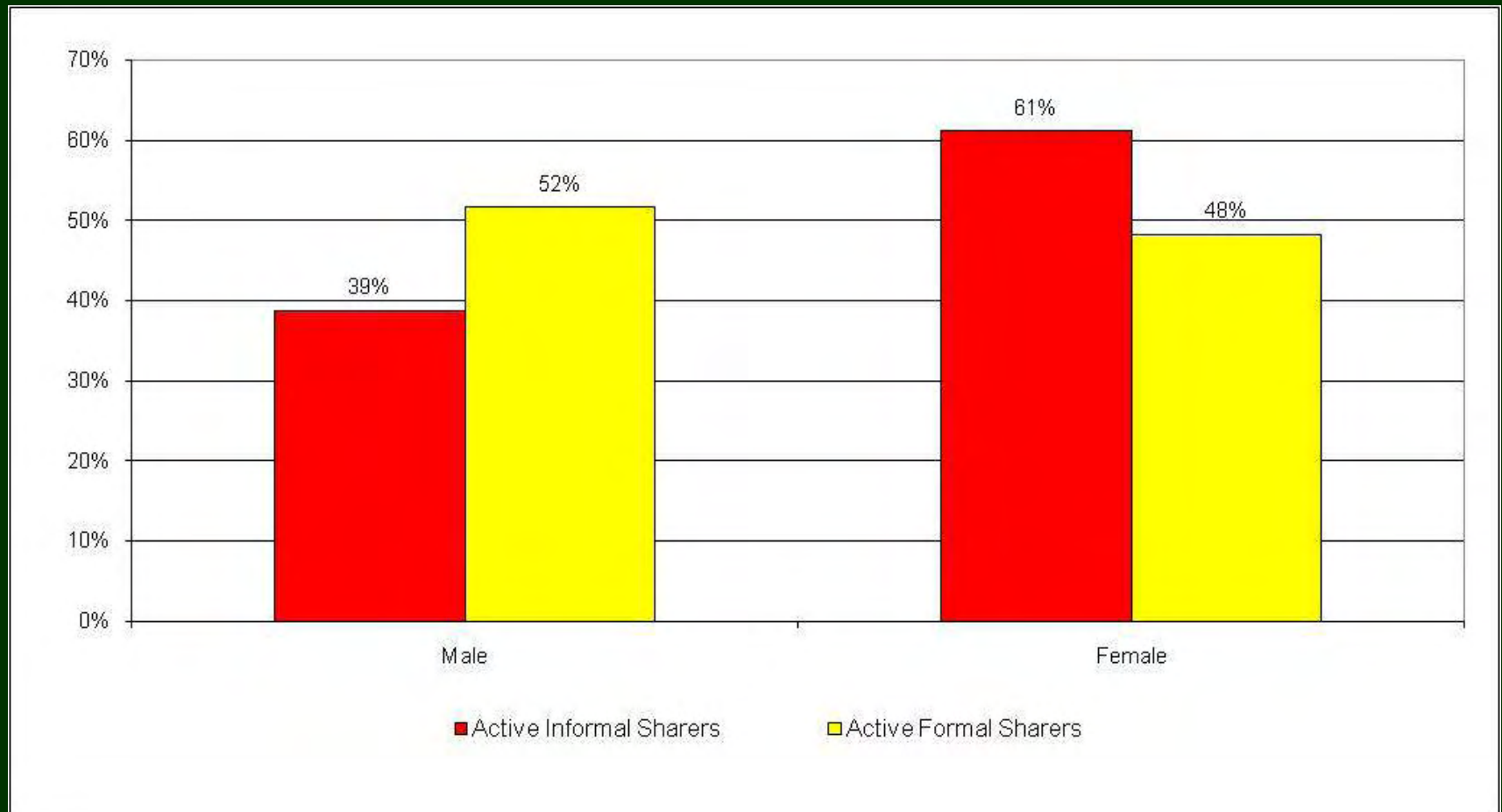
# Take up of car sharing in the region

- 68% of all telephone respondents share a journey informally once a month or more with someone outside of their household
- Just 0.5% of all telephone respondents registered as members of a formal car sharing scheme
- Only 17% of registered members of formal schemes surveyed online are active sharers (8% previously shared but have now stopped)
- 75% of registered members of formal schemes surveyed online have never car shared

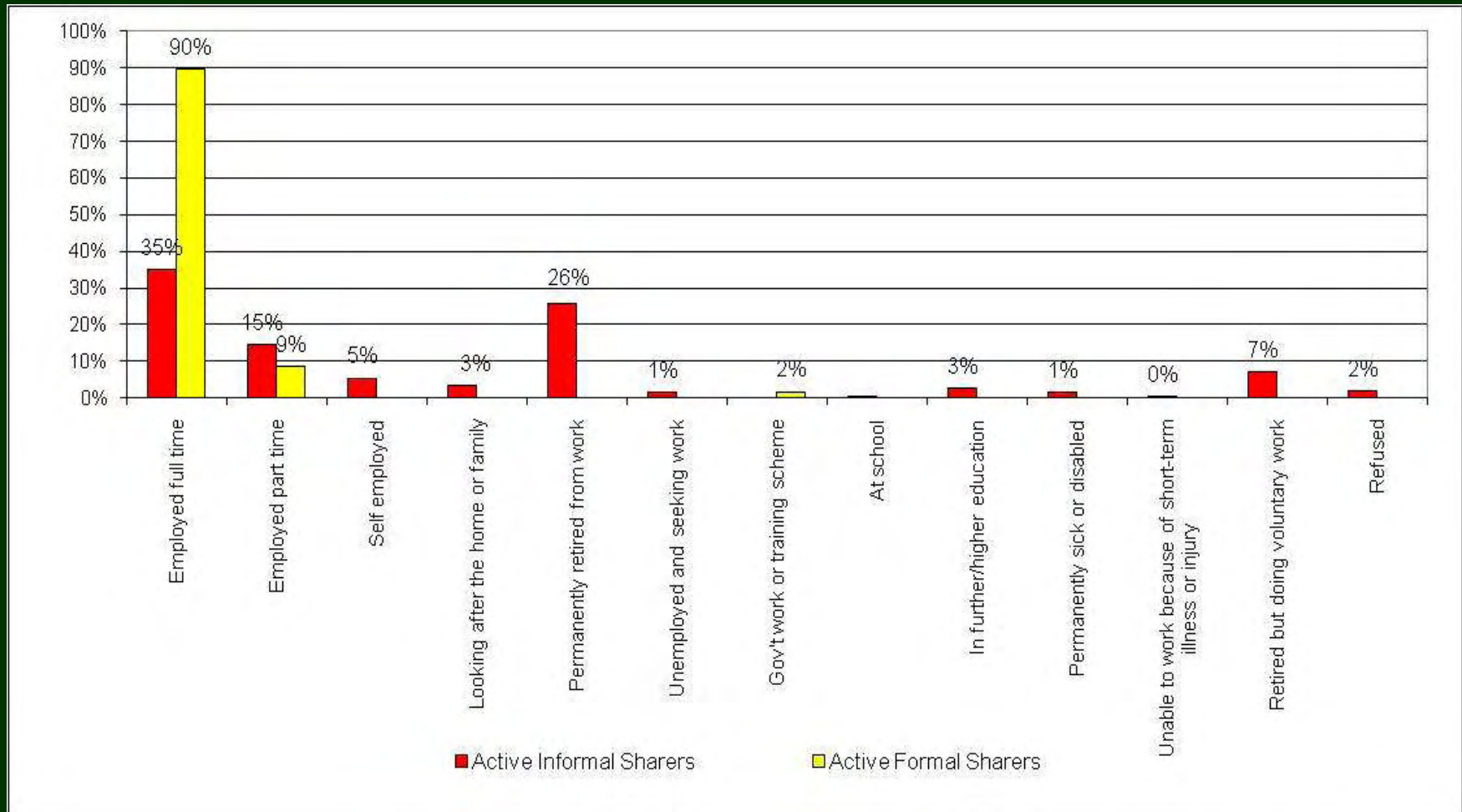
# Car sharers' profile: Age



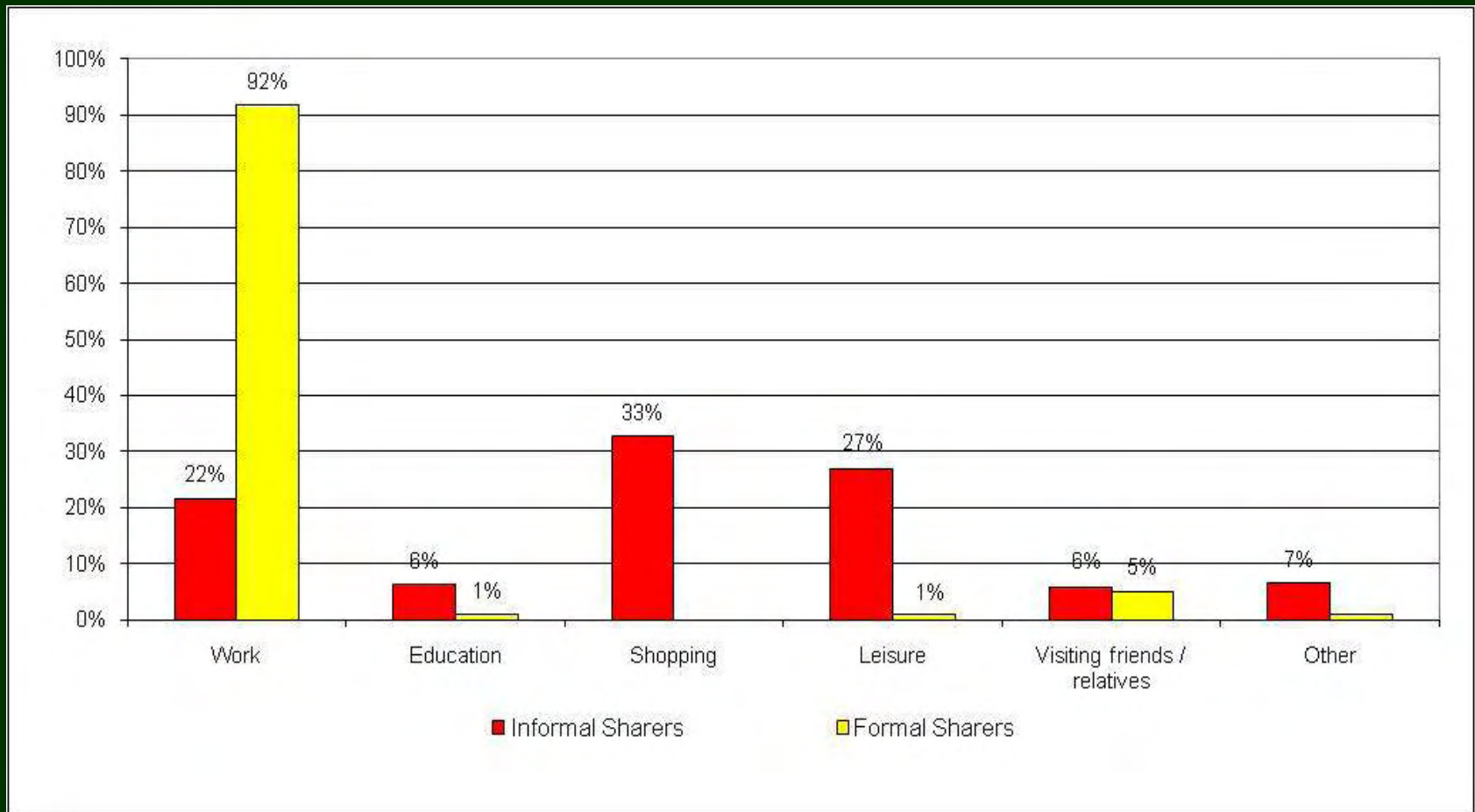
# Car sharers' profile: Gender



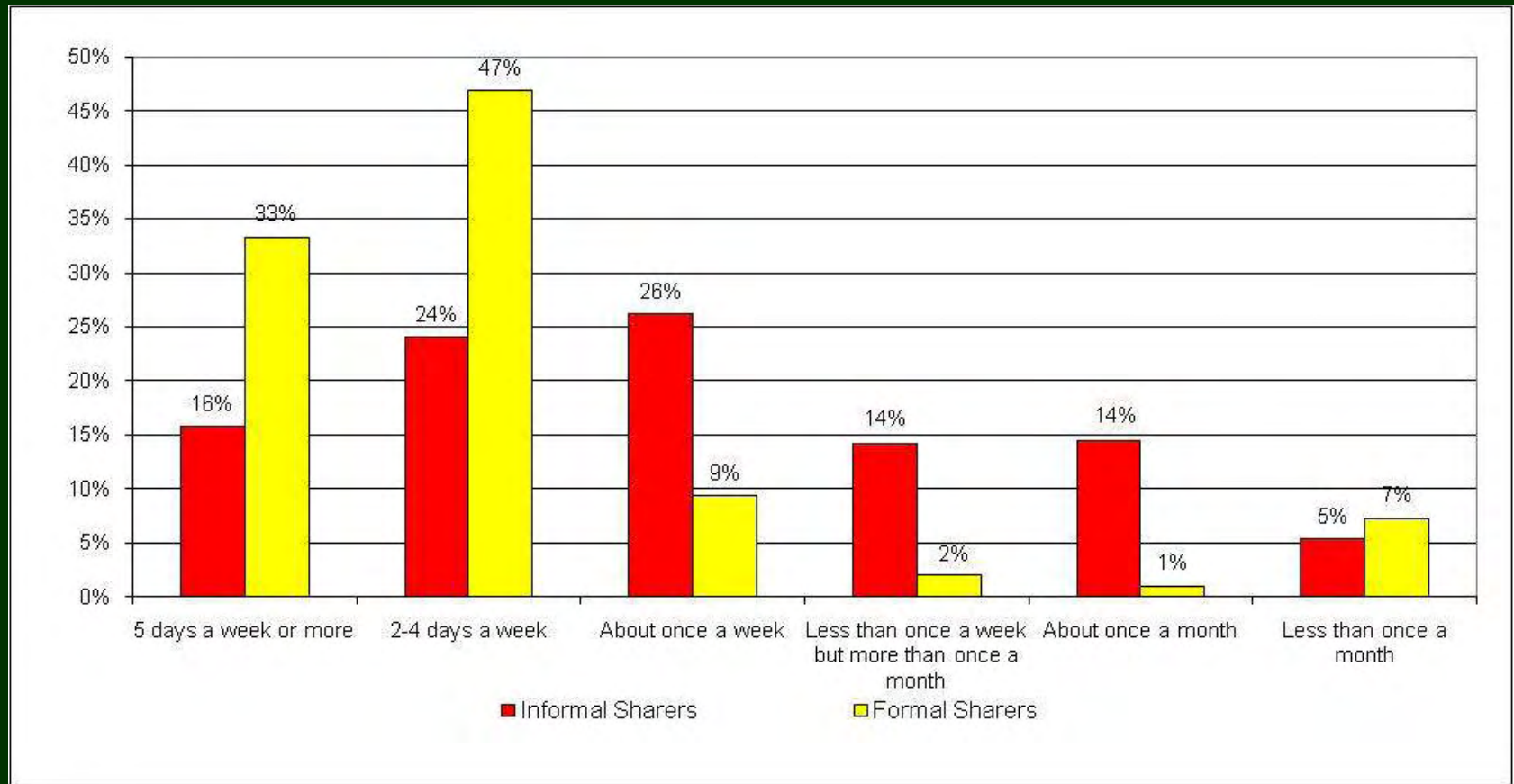
# Car sharers' profile: Employment status



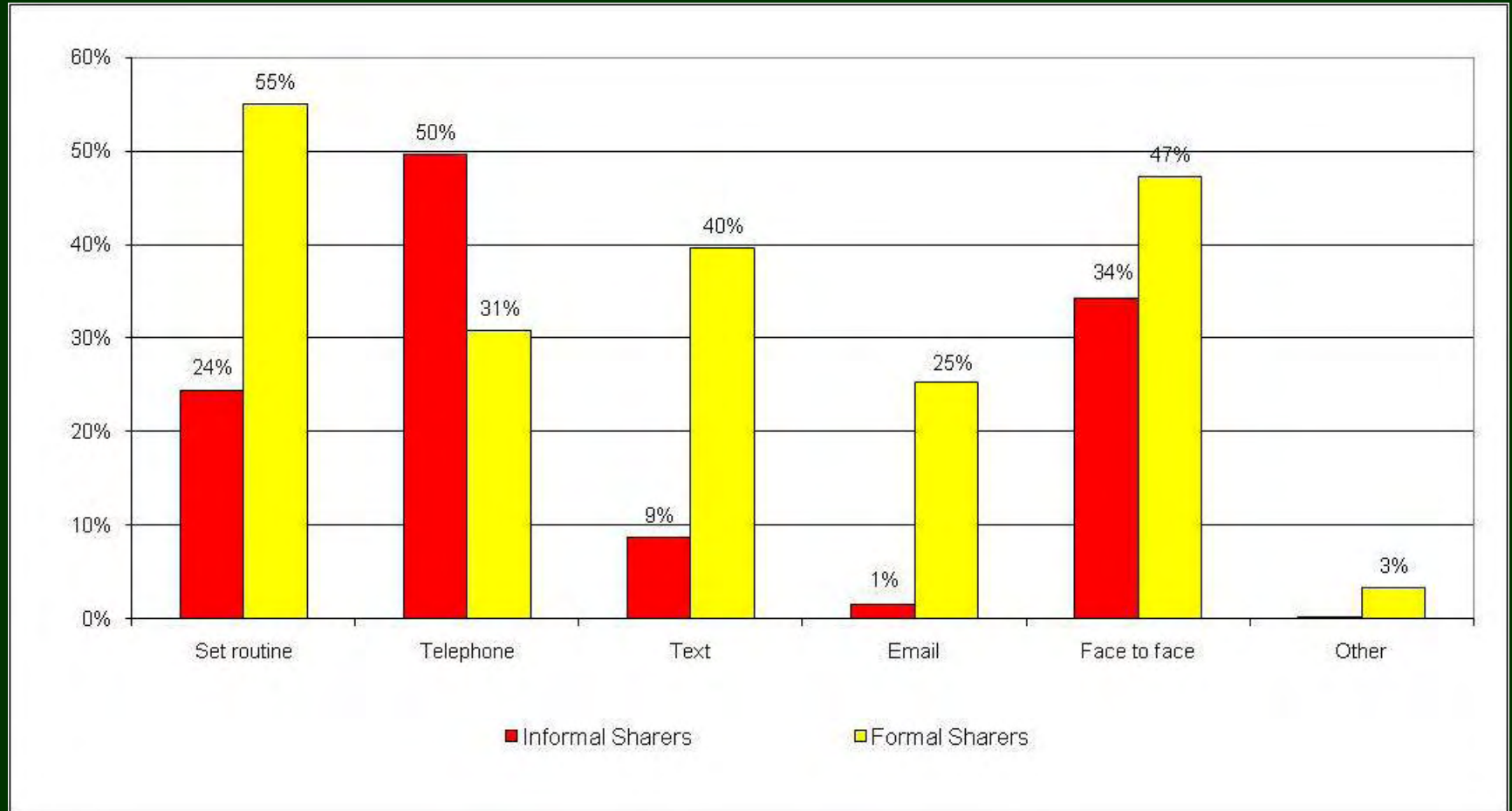
# Car sharers' profile: Journey purpose



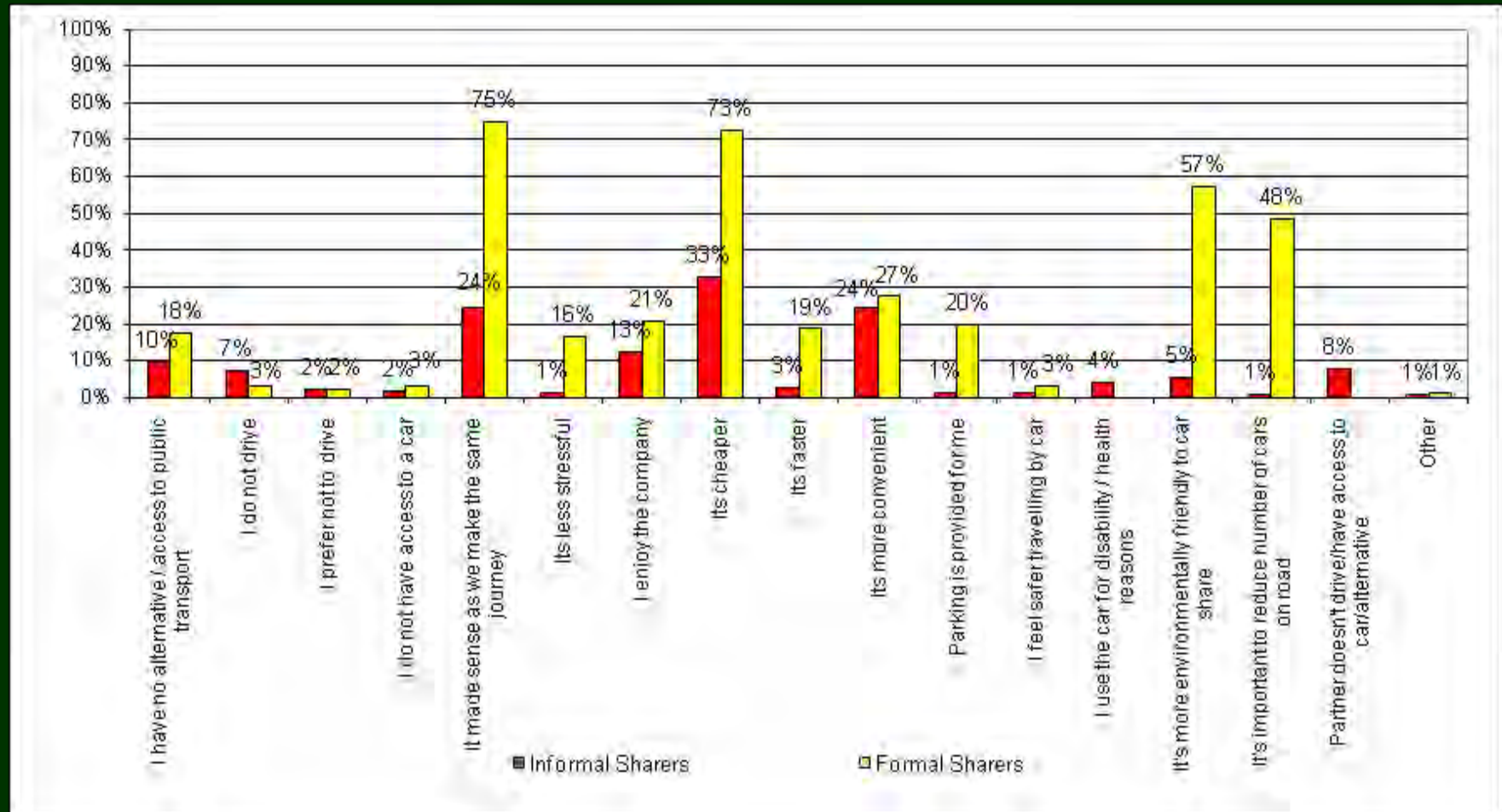
# Car sharers' profile: Journey frequency



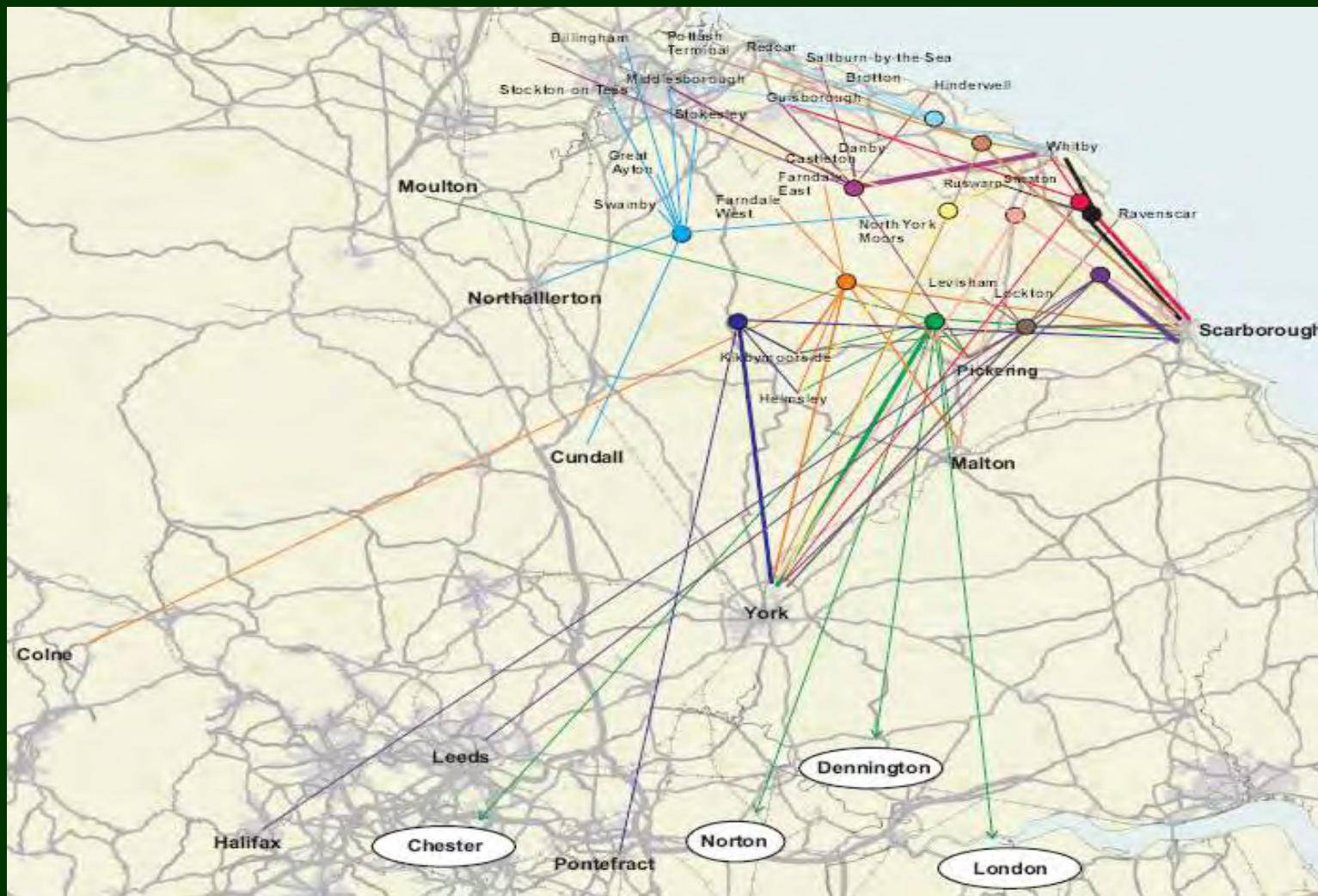
# Car sharers' profile: Lift arrangements



# Car sharers' profile: Reasons for sharing

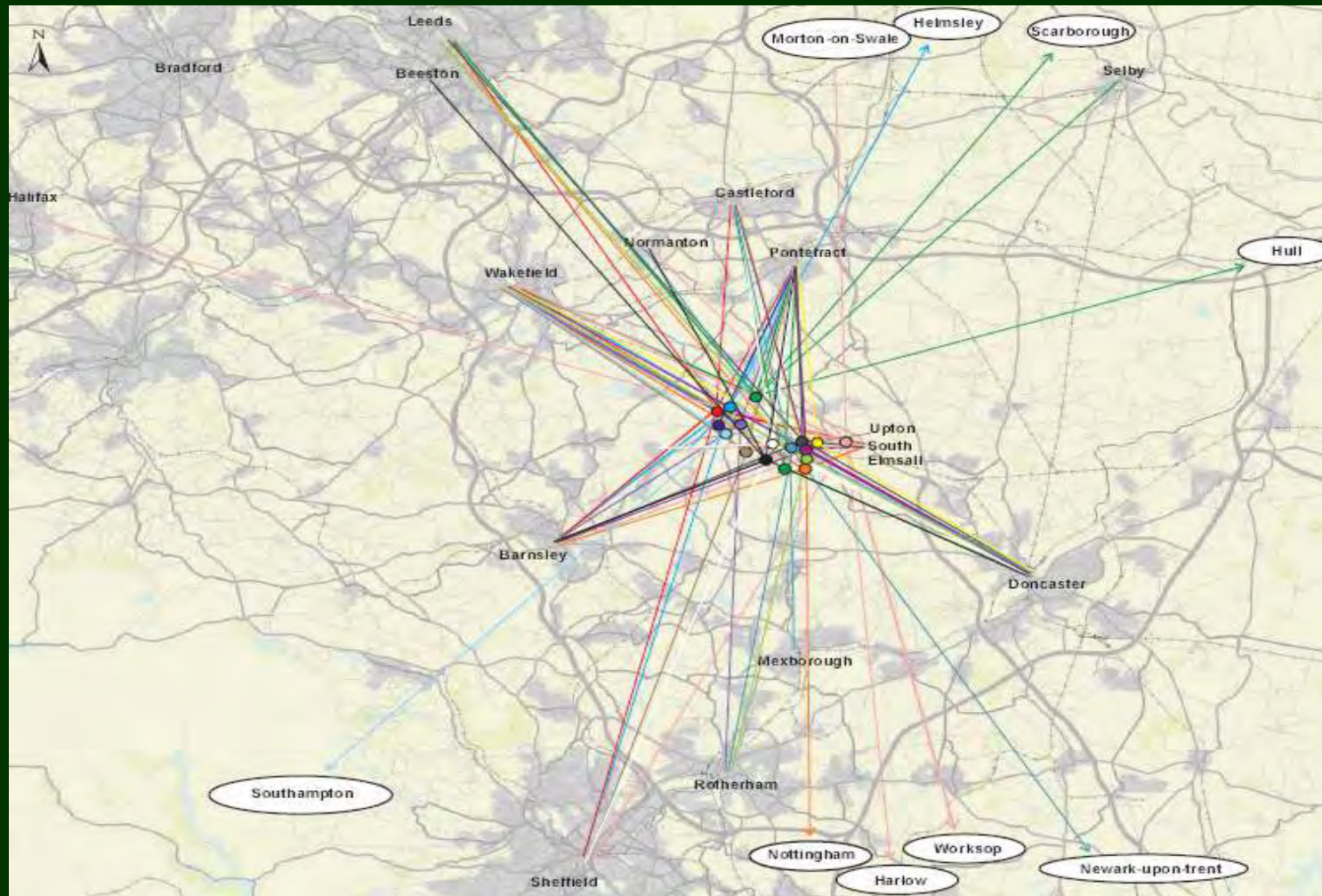


# Current impact of informal sharing: Remote rural area



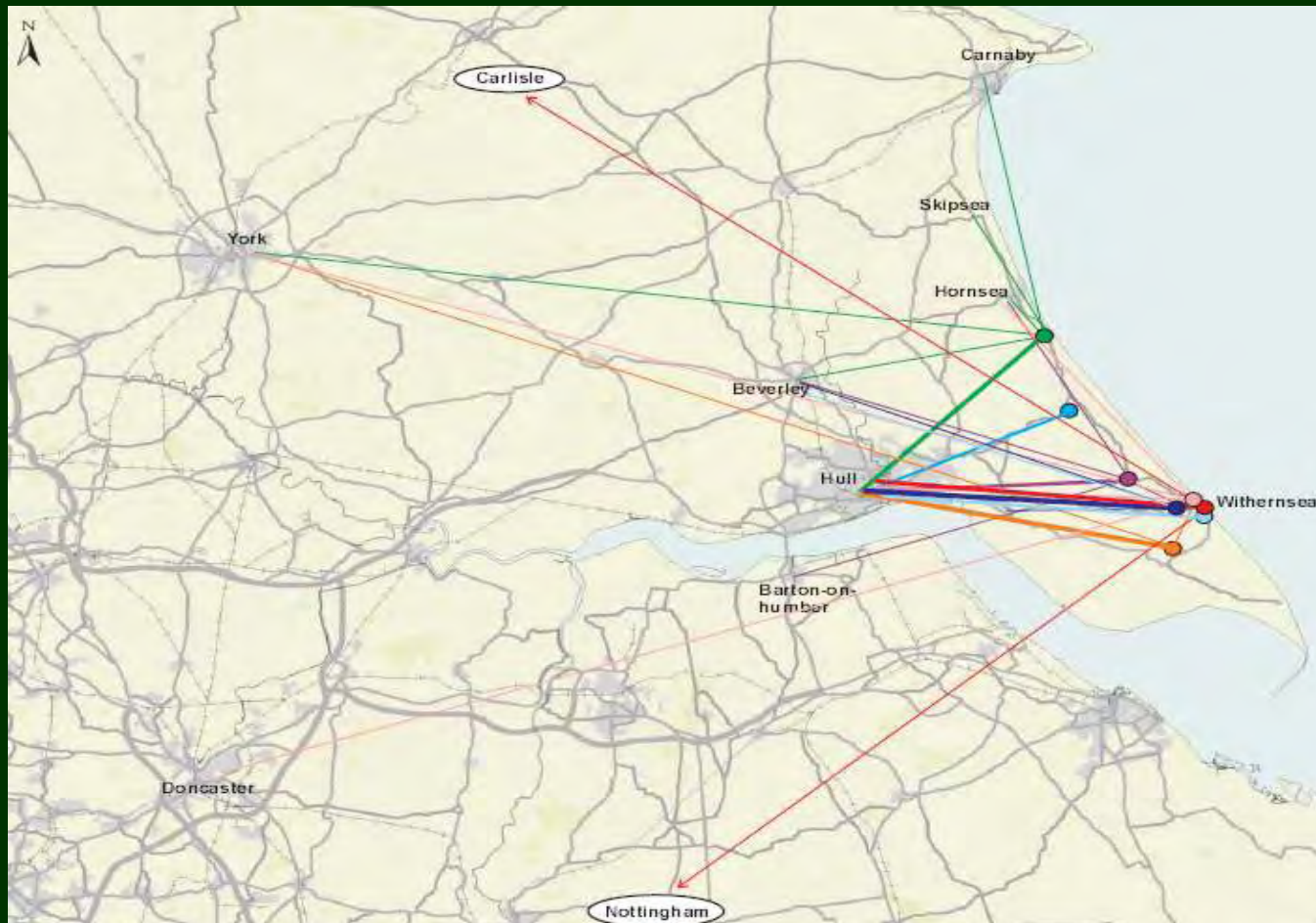
- Scarborough (22%), York (15%), Whitby (15%) plus Pickering, Kirkbymoorside, Middlesbrough and Guisborough.

# Current impact of informal sharing: Pennine - West Yorkshire area



- Main destinations: Pontefract (22%), Wakefield (18%) and Doncaster (11%) plus South Elmsall, Barnsley, Leeds, Castleford.

# Current impact of informal sharing: Coastal area



- 65% of journeys into Hull
- Other common journeys include Withernsea, Beverley, Hornsea and York

# Current impact of informal sharing: Accessible rural area



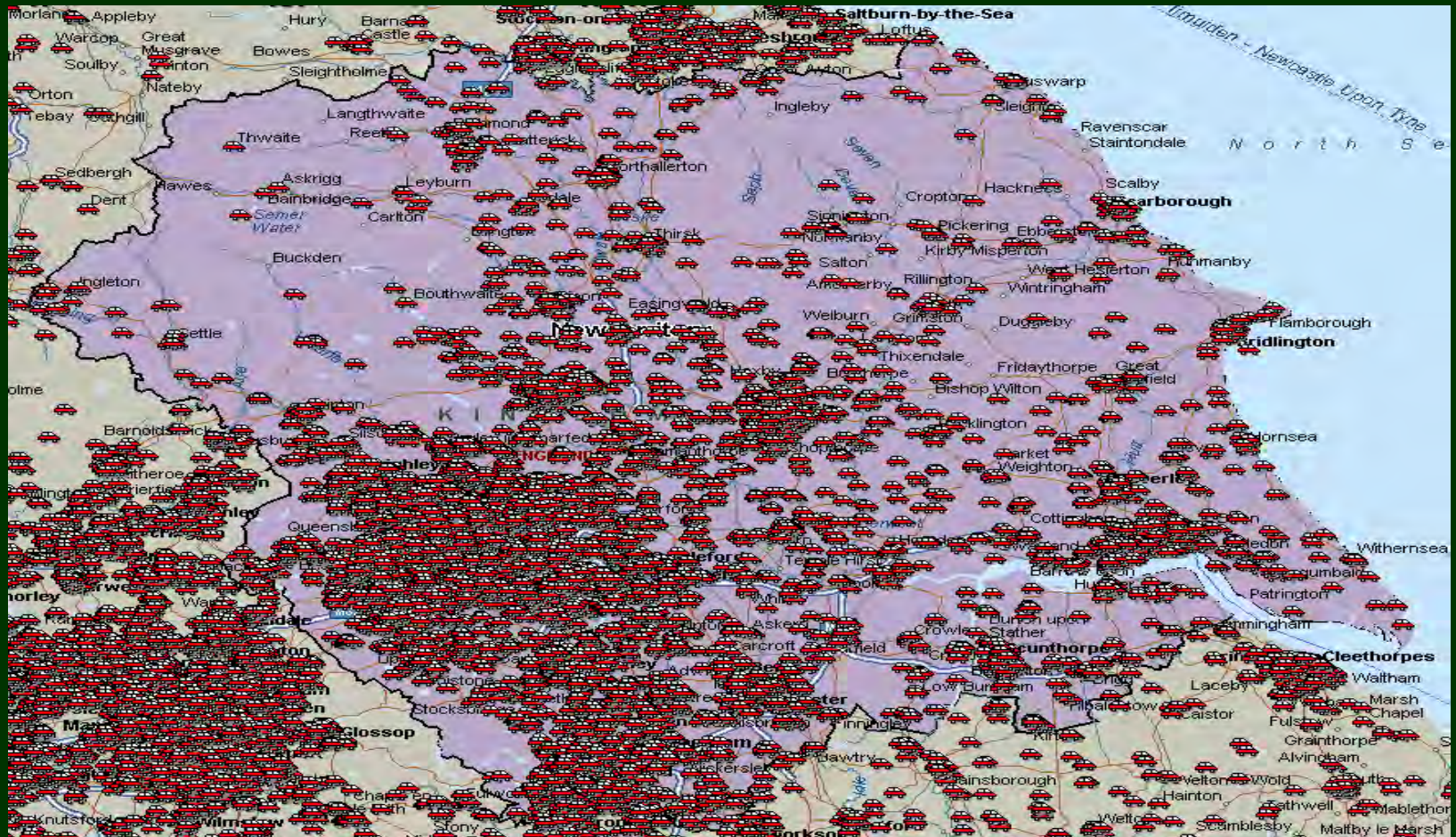
- 46% of journeys into Harrogate
- 15% to Leeds
- Other destinations include Bradford, Wetherby & York

# Current impact of formal sharing



- Most journeys begin or end in Leeds, York, Harrogate, Hull and Halifax

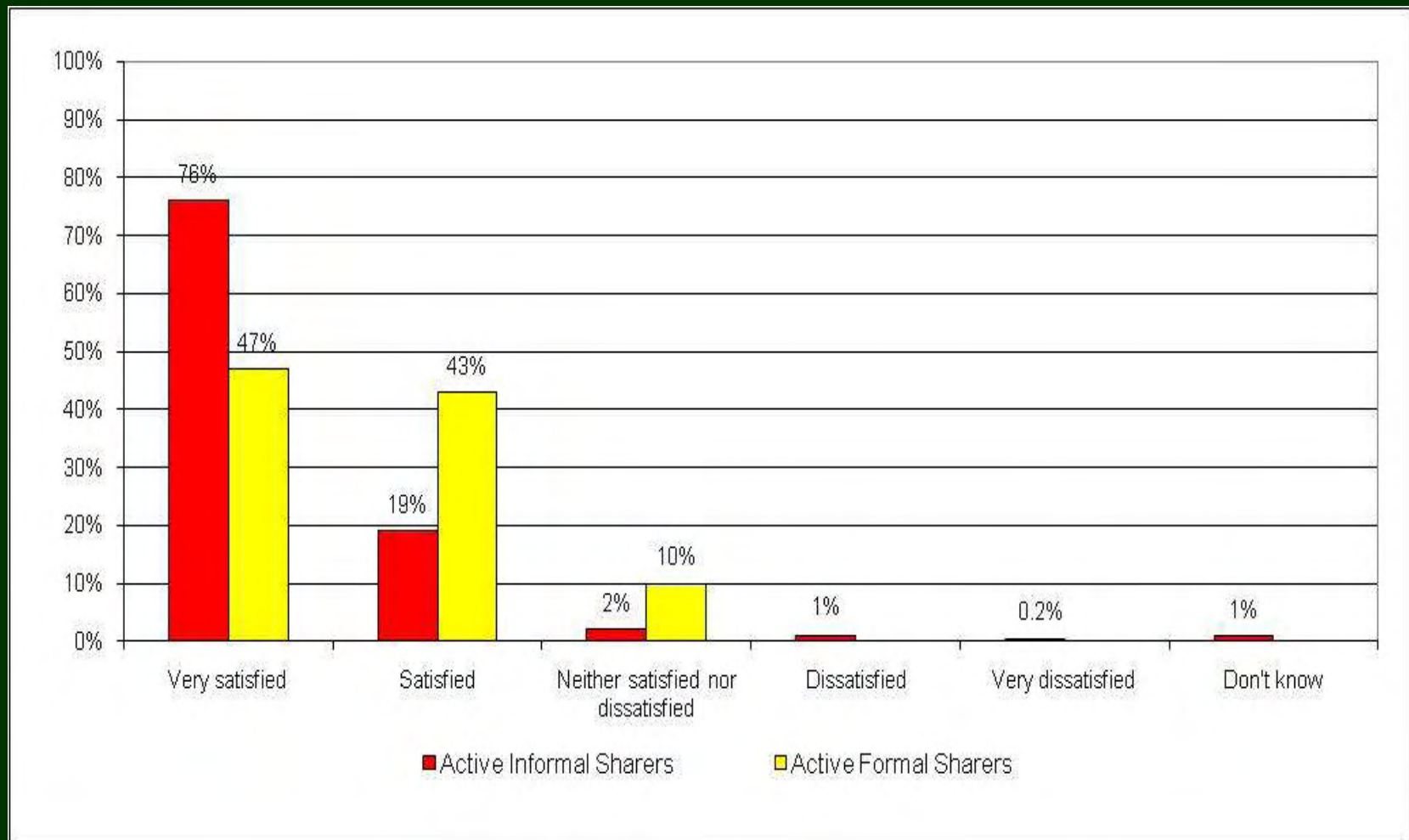
# Distribution of existing formal members



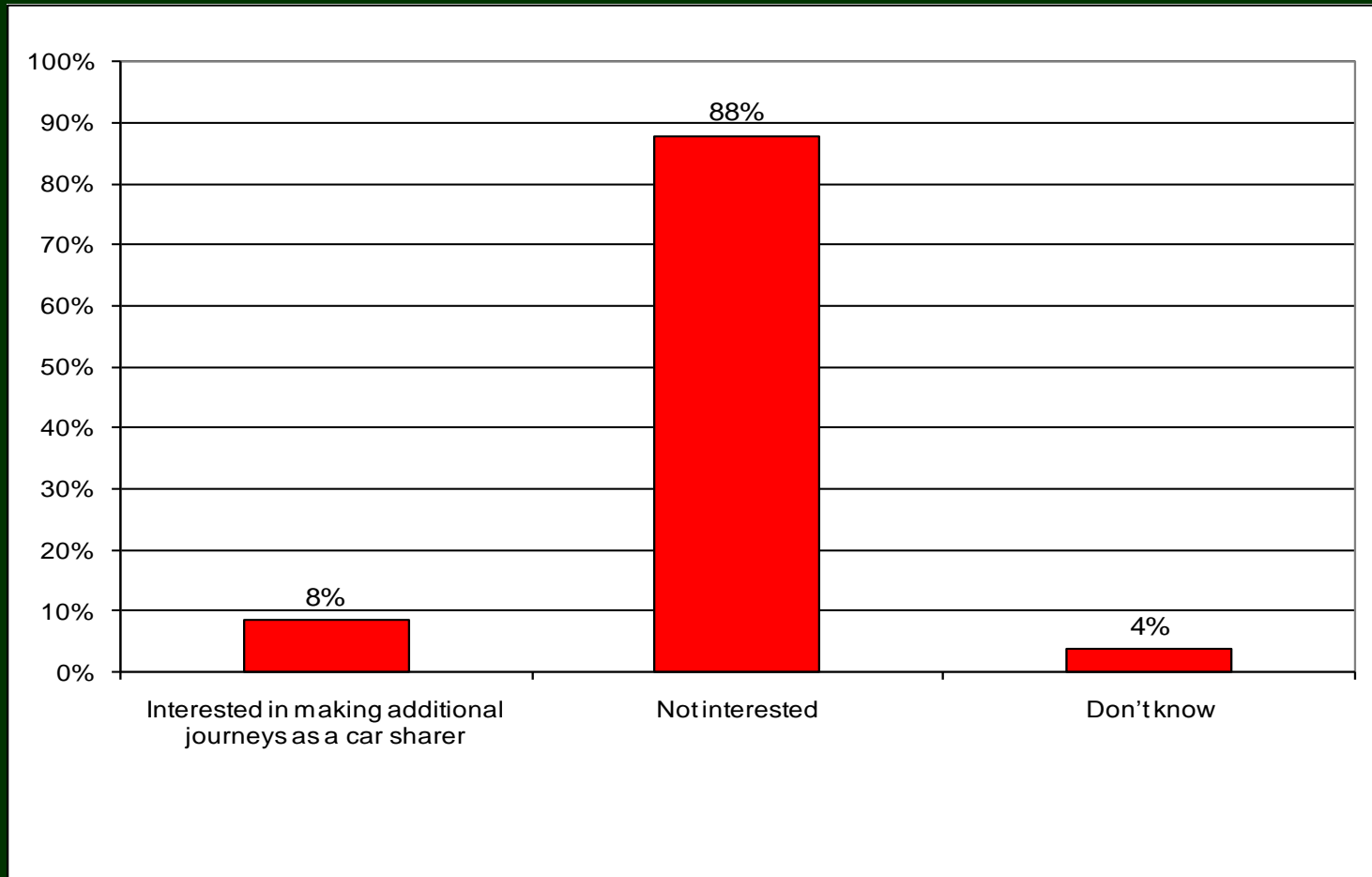
Across the region (approx. 18,000)

Source: Liftshare

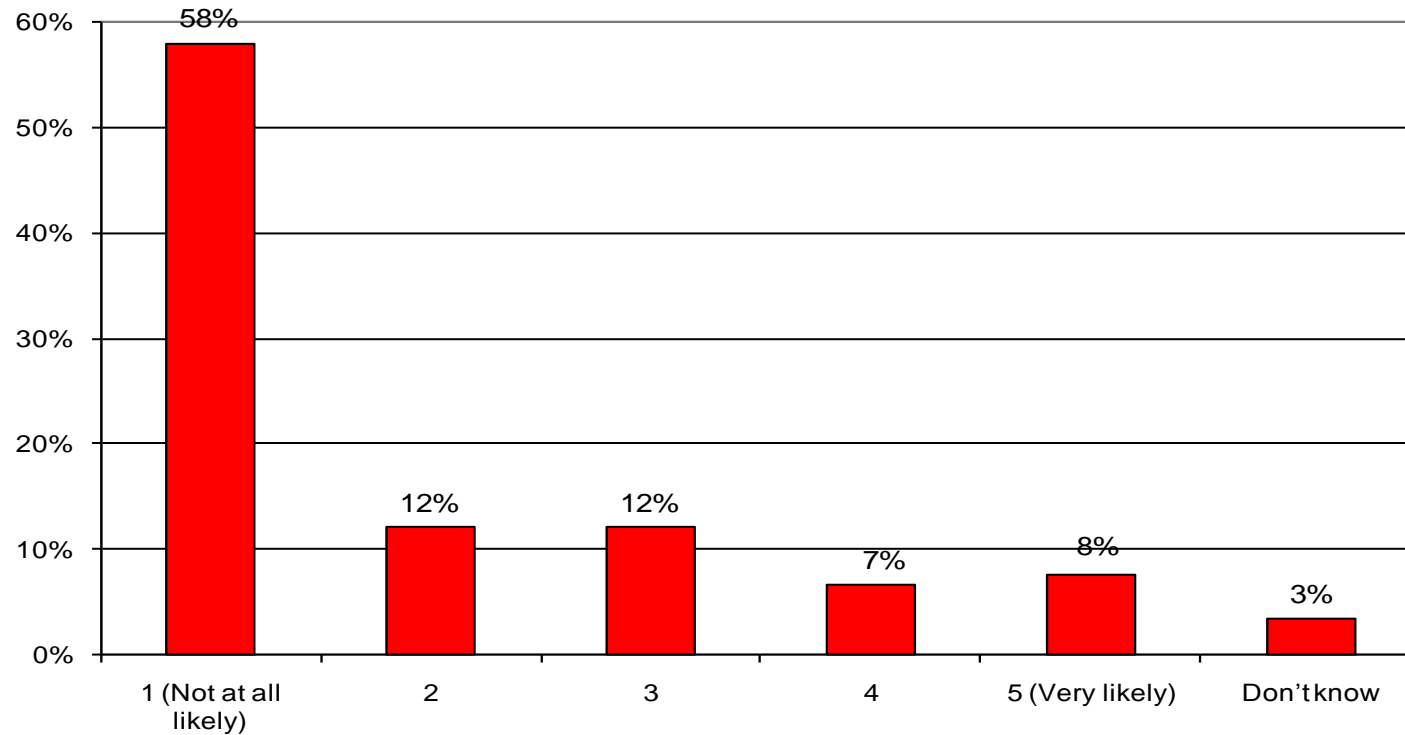
# Active car sharers: Satisfaction levels



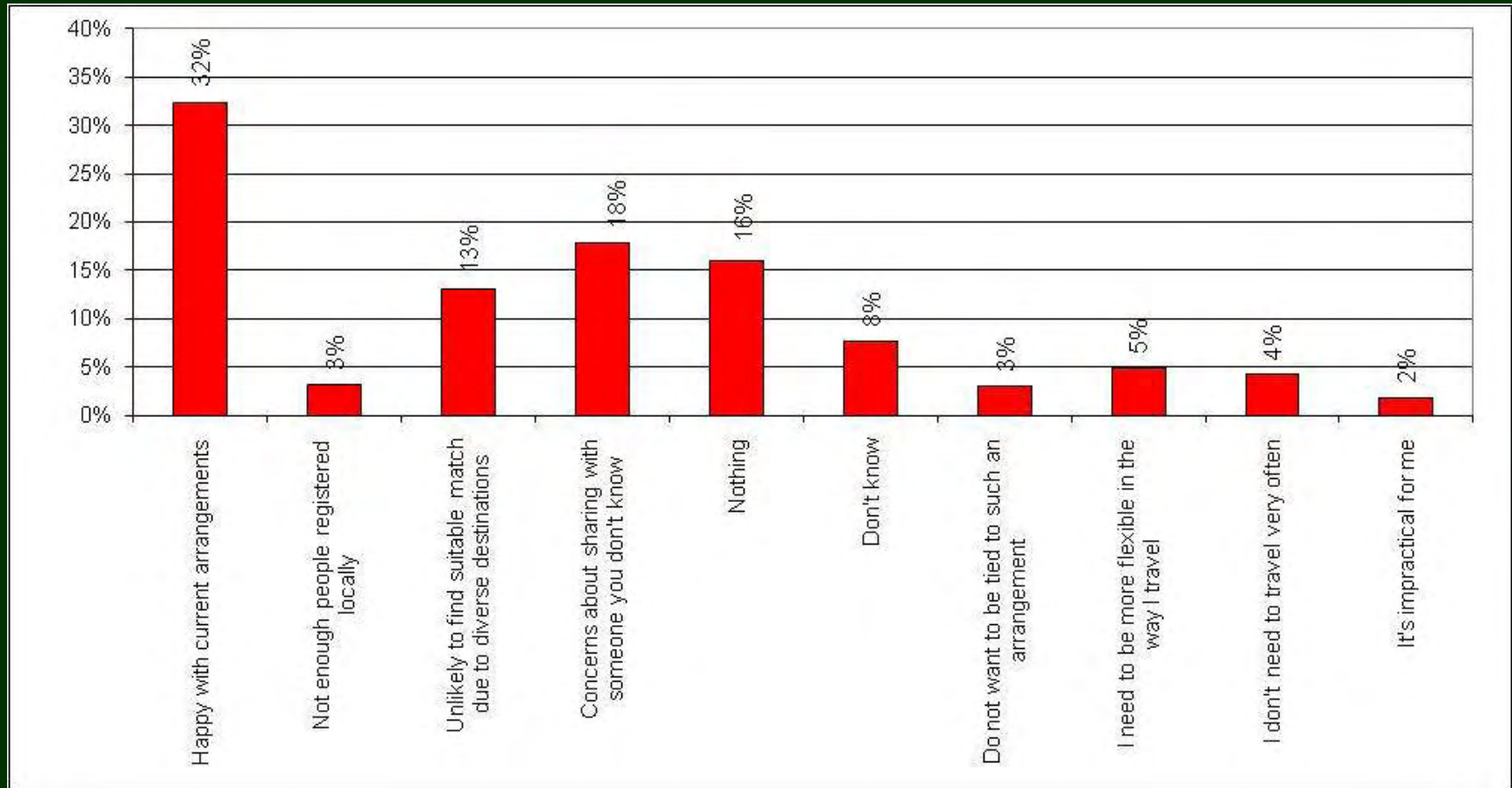
# Informal sharers: Potential take up of additional informal car sharing journeys



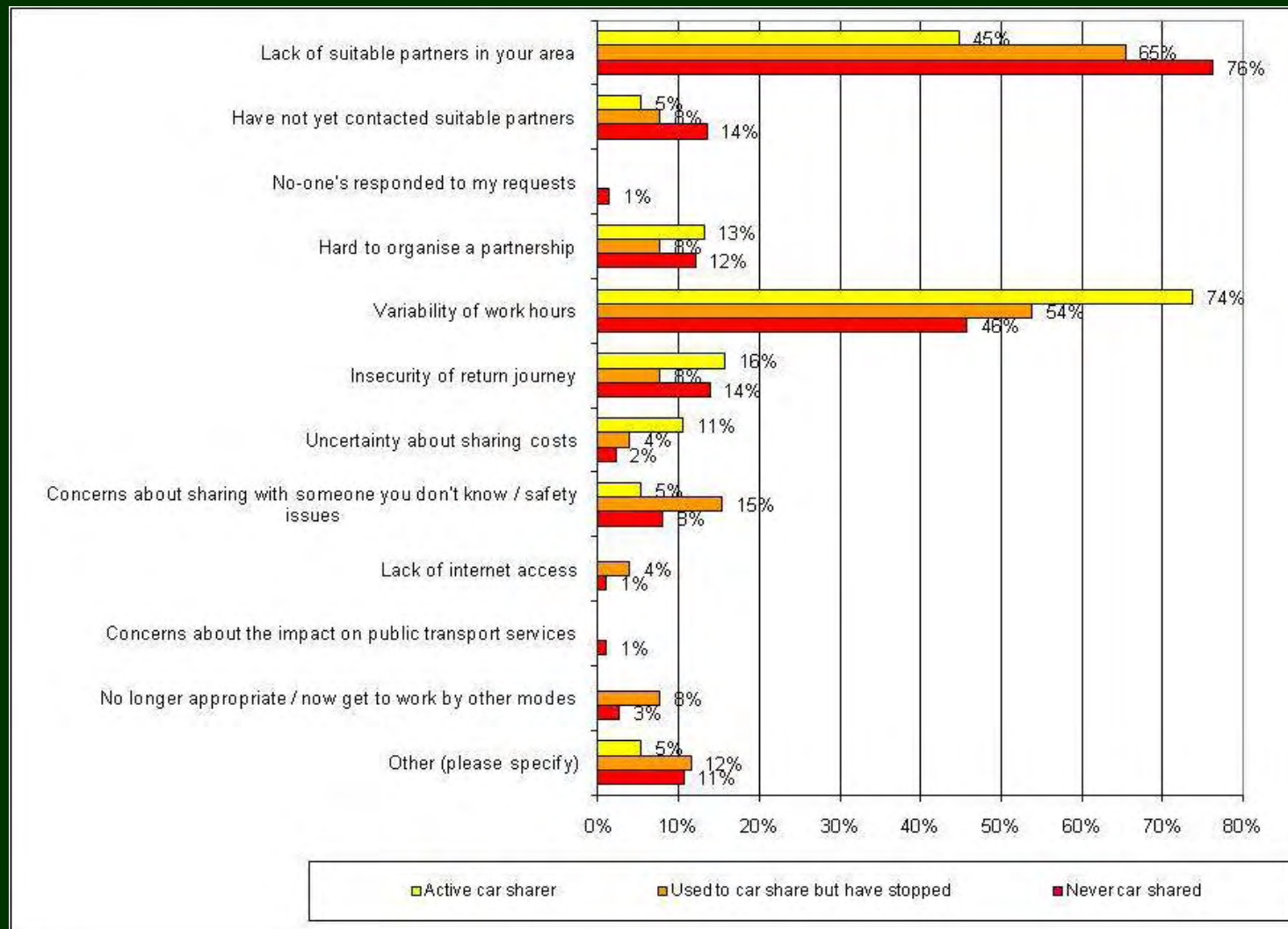
# Informal car sharers: Likelihood of joining a formal scheme



# Informal car sharers: Barriers to formal scheme take up



# Formal car sharers: Barriers to share more



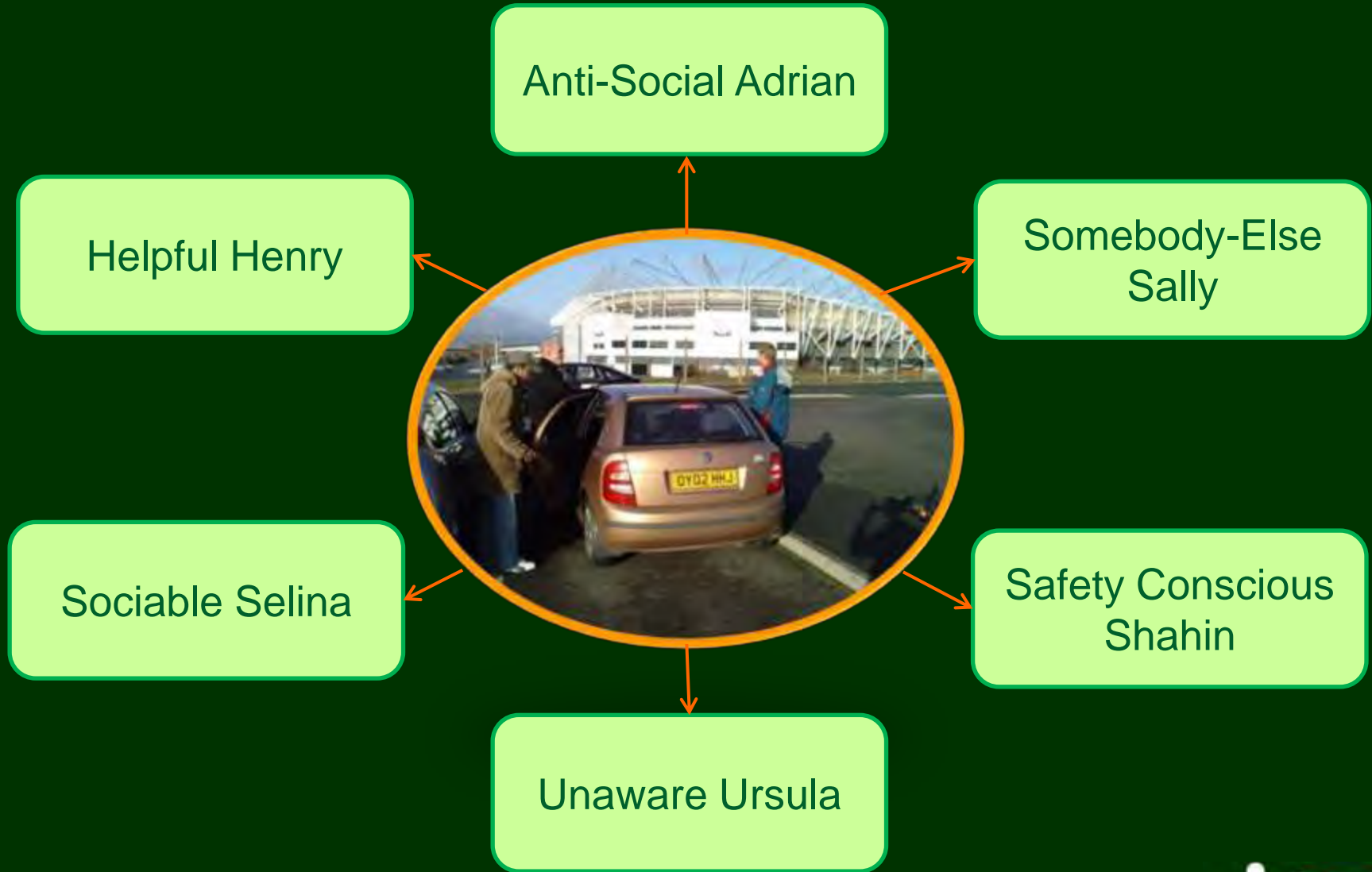
# Yorkshire & Humber Regional Rural Car Share Feasibility Study

## Qualitative Research Findings

# Focus group method

- 4 groups:
  - Humber (recruited by City of Hull & Humber Environment Forum)
  - North Yorkshire (recruited on street)
  - West Yorkshire (1) recruited on street
  - West Yorkshire (2) recruited at workplace
- Areas of exploration:
  - Information about the participants
  - Awareness of and barriers to car sharing
  - Factors that could encourage car sharing and awareness of formal schemes

# Who are the non-sharers?



*"I think the only way it could work in a rural area is if ... you're old and you need someone else"*

# Yorkshire & Humber Regional Rural Car Share Feasibility Study

## Marketing Analysis

# Marketing Analysis

- 4 Marketing Ps – Product, Place, Promotion, Price
- 4 Yorkshire & Humber case studies
- 3 National case studies
- 1 Closed scheme
  
- Outputs / outcomes:
  - Number of people registered
  - Number of employers registered
  - Marketing channels and materials (4 Ps)
  - Media coverage
  - Website hits
  - How well people recall the schemes (focus groups)

# Results

Car share scheme	Year scheme set up	Number of members	Number of employers
Devon	2003	7,100+	12
Peterborough		1,000+	5
Worcestershire*	2001	1,450+	23
Calderdale	2006	1,020+	2
Harrogate	2005	1,100+	3
Leeds	2003	3,500+	14
East Riding of Yorkshire	2006	800+	1

# Awareness of formal schemes

Register Sign In

Sponsored by **Travel2airport.com** Yorkshire number 1 for airport travel powered by **SBC** 0800 2981059

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Working for you



Do busy roads **drive** you to distraction?

Are you **tyred** of parking issues?

Are you **exhausted** by a long commute?

Then come along and get fuelled up about **Car Sharing**

**The Car Share Surgery is open on Thursday 29<sup>th</sup> January 10:00 - 12:30 in the reception area, Crescent Gardens**

This is your chance to ask questions, raise issues, get help registering and find out if anybody else is going your way.



**Refreshments** and car share goodies are on offer  
If you register on the day you'll receive a Car Share Mug

Click into your Home button to make us your homepage

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integrated transport planning

# Score

Scheme	Main channels used	Overall score
Devon	Road signs, bus backs, billboards, giveaways, media, competitions	31
Leeds	Billboards, media, bus backs, posters.	28
Worcestershire	Billboards, media, competitions, direct mail, posters	24
Peterborough	Newsletters, media, competitions	21
Harrogate	Road signs, posters, car share bays, coffee mornings	15
Calderdale	Road signs, online, media, car share bays	13
East Riding	Posters, payslips, media	11

# Social Marketing Study

- Defining social marketing
- Behaviour change theories
- Planning a comprehensive social marketing programme
- Lessons learnt from 5 case studies
- Application to car sharing in Yorkshire & Humber

# Defining social marketing

- “A process for creating, communicating and delivering benefits that a target audience(s) wants in exchange for audience behaviour that benefits society without financial profit to the marketer.”

- Bill Smith, *Social Marketing, Influencing Behaviours for Good*, 2006

# The 8Ps and Benchmark Criteria

## Marketing 4 Ps

### Product

- The service provided or concept being marketed

### Promotion

- The communication channels

### Place

- The interventions and / or distribution channels

### Price

- Perceived benefits vs (social) consequences or competition



# The 8Ps and Benchmark Criteria

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## Social Marketing Supplementary 4 Ps

### Publics

- Internal and external audiences

### Partnerships

- Relevant organisations, skills and resources

### Policy

- Required to support the behaviour change

### Purse-strings

- Funding, grants, income and investment

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## Benchmarking Criteria

Customer Focus

Behaviour Change Focus

Theoretical Integration

Insightful Approach

Exchange Analysis

Competition Analysis

Market Segmentation

Mix of Methods

# The 8Ps and Benchmark Criteria

## Marketing 4 Ps

<b>Product</b> <ul style="list-style-type: none"> <li>•The service provided or concept being marketed</li> </ul>	<b>Promotion</b> <ul style="list-style-type: none"> <li>•The communication channels</li> </ul>	<b>Place</b> <ul style="list-style-type: none"> <li>• The interventions and / or distribution channels</li> </ul>	<b>Price</b> <ul style="list-style-type: none"> <li>•Perceived benefits vs (social) consequences or competition</li> </ul>
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## Social Marketing Supplementary 4 Ps

<b>Publics</b> <ul style="list-style-type: none"> <li>•Internal and external audiences</li> </ul>	<b>Partnerships</b> <ul style="list-style-type: none"> <li>•Relevant organisations, skills and resources</li> </ul>	<b>Policy</b> <ul style="list-style-type: none"> <li>•Required to support the behaviour change</li> </ul>	<b>Purse-strings</b> <ul style="list-style-type: none"> <li>•Funding, grants, income and investment</li> </ul>
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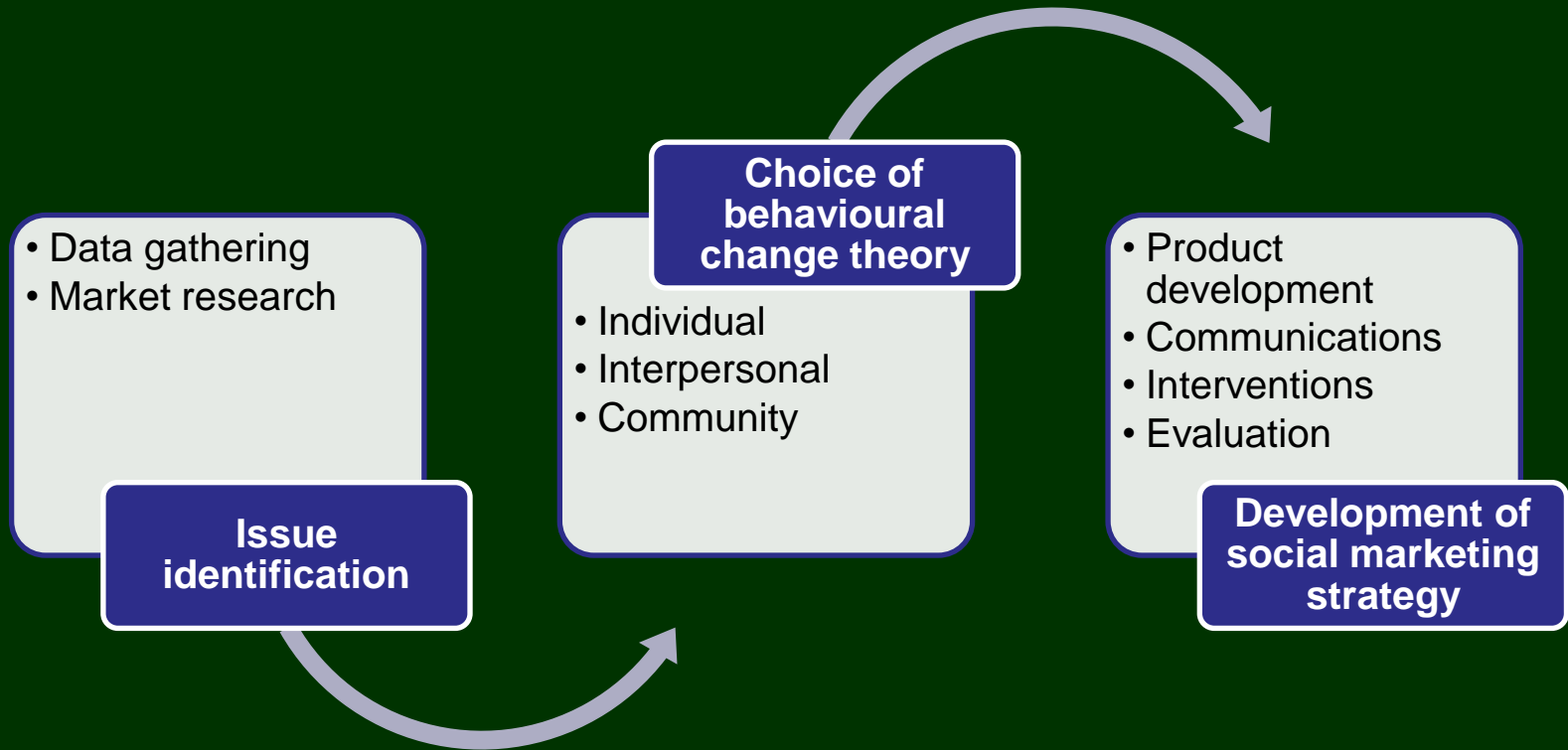
## Benchmarking Criteria

<b>Customer Focus</b>	<b>Behaviour Change Focus</b>	<b>Theoretical Integration</b>	<b>Insightful Approach</b>	<b>Exchange Analysis</b>	<b>Competition Analysis</b>	<b>Market Segmentation</b>	<b>Mix of Methods</b>
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# Behavioural change theories

Level	Theory
<b>Individual level</b>	<b>Transtheoretical (Stages of Change) Model</b>
	<b>Health Belief Model</b>
	<b>Theory of Reasoned Action and Planned Behaviour</b>
<b>Interpersonal Level</b>	<b>Social Cognitive / Learning Theory</b>
	<b>Structuration Theory</b>
<b>Community Level</b>	<b>Community Organisation Theories</b>
	<b>Organisational Change Theory</b>
	<b>Diffusion of Innovations Theory</b>

# Social marketing in context



# Planning a social marketing strategy



# Case studies

- Range of budgets
- Range of behaviour change theories
  
- Choose appropriate behaviour change theory
- Design social marketing strategy to suit
- Need good communication between partners
- Need consistent policies
- Strong partnership with media essential
- Look for existing resources
- Engage participants actively (in measuring and reporting)

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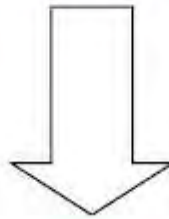
## Overall Conclusions & Recommendations



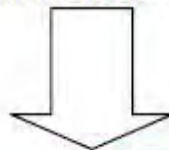
18,000 Registered Car Sharers across Yorkshire & Humber



Software  
licences: £65,000  
per year



17% currently actively car share 3 times per week on average =  
an estimated 3.9 million vehicle kilometres saved per year



Total saving of 790 tonnes of CO<sub>2</sub> at an estimated cost of £0.017  
per vehicle kilometre

# Key conclusions

- Conclusions from consumer research
  - 2/3 of adults regularly share journeys
  - Higher sharing levels in deeper rural areas / no car
  - Interest in more sharing
  - Awareness of formal schemes low
  - High satisfaction amongst registered sharers
  - Barriers:
    - Non Sharers: inconvenience, fear, safety, insurance
    - Sharers: Organising and maintaining arrangements
  - Where does cost sit?

# Key conclusions

- Conclusions from marketing analysis
  - Large variety in approach and brands > dilutes message
  - Lack of 'evidence led' adaptive learning
    - 1. Roadside signs & web-links
    - 2. Workplace comms
    - 3. Billboards & bus backs
  - Focus on urban market

# Recommendations

- **Operational and organisational** recommendations
  - Clearly defined regional strategy / approach
    - Embedded in LTP3 / RTS
    - Focused objectives and targets (including outcomes)
    - Appropriate monitoring
    - Adaptive learning
  - Sub regional coordinators vs resourced co-ordinators
  - Fostering champions and raising profile (CS partnership)
  - Dealing with leakage / inactivity – regular updates
  - Supporting infrastructure: HOV, signage, parking
  - Local business case
  - Use the tools (already invested) more effectively
  - Not just about commuting – festivals, events, leisure

# Recommendations

- **Marketing** recommendations
  - Clear and consistent marketing strategy (4 P's)
  - Common(er) marketing / branding
  - Targeted on strengths / perceived barriers
  - Engage local communities / informal sharing
  - ICT opportunities and social networking
  - Business champions / media engagement
- Employment agencies – pilot project?
- Car Share Demonstration Town / Region?

## To sum up: 'TOP 6'

1. Car sharing has valuable role to play in rural communities
2. Things aren't as effective as they could be, but still a very cost effective tool
3. Smarter investment – car sharing to be a regional priority
4. Co-ordination of resources and delivery
5. Introducing new (and different) forms of marketing
6. Piloting of a 'car share demonstration town / region'

# Any questions?



## EAST RIDING CARSHARE

Want to save money, reduce your carbon footprint, ease congestion, help reduce pollution and make new friends?

Then join our secure, free on-line care sharing scheme!

- Simply go to [www.eastridingcarshare.com](http://www.eastridingcarshare.com)
- Follow the quick registration process
- Don't forget to register your journey!
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Sharing a journey from Market Weighton to Beverley, 20 miles a day, 5 days a week could save you approx. £750 and 1.6 tonnes of CO<sub>2</sub> a year.

Sharing a journey from Driffield to Beverley, 40 miles a day, 5 days a week could save you approx. £1,345 and 2.8 tonnes of CO<sub>2</sub> a year.

[www.eastridingcarshare.com](http://www.eastridingcarshare.com)

[WWW.CARSHARELEEDS.COM](http://WWW.CARSHARELEEDS.COM)

Save. Share. Save the World!

### 3 EASY STEPS TO CARSHARE

- 1. SEARCH**  
Register free on [www.carshareleeds.com](http://www.carshareleeds.com). Search for a car share match in your area, or to visit friends.
- 2. MATCH**  
Click to receive a 30' or all or part of your trip.
- 3. SHARE**  
Arrange to meet and share your journey.

Remember these and save time, money & be so carshare!

TODAY'S DRIVING NIGHTMARE:

PARKING    CONGESTION    FUEL COSTS

TODAY'S DRIVING SOLUTION... CARSHARELEEDS.COM

BE PART OF THE SOLUTION... CARSHARE

- AVAILABLE FREE TO EVERYONE
- SHARE THE JOURNEY SHARE THE COSTS
- REDUCE PARKING PRESSURES
- DO YOUR BIT FOR THE ENVIRONMENT
- SECURE AND CONFIDENTIAL

It's easy and efficient to arrange... Register free now at [www.carshareleeds.com](http://www.carshareleeds.com)

### Four good reasons to car share

- 1. Save money**  
Share the cost of fuel and parking.
- 2. Make friends**  
Get meeting to a great way to communicate with friends.
- 3. Help improve the environment**  
Cut parking and reduce greenhouse gas by using a smaller car.
- 4. Save time**  
Save the hassle by using a carshare to meet the car sharing to your advantage.

find a match at [www.carshareleeds.com](http://www.carshareleeds.com)