KEYS FOR ALL:
How car clubs can work for disabled people

JULY 2025

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CoMoUK
supporting shared transport

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CONTENTS

EXECUTIVE SUMMARY

This project was undertaken by CoMoUK and TRL, with funding provided by the Motability Foundation, with the aim of supporting wider adoption of car clubs by disabled people.

We believe this is the first detailed study which has delivered an in-depth investigation into car club accessibility, bringing together the needs and preferences of disabled people with the views of car club operators. Our work comes at an opportune and challenging time as crises of climate change, the cost of living and air quality continue to press in upon us generally and perhaps in particular upon disabled people.

We thank the Motability Foundation for their support of this novel work; without that support it would not have taken place. For the first time we here examine the accessibility gap for disabled people in relation to car sharing, and in particular the well-established car club format.

We have gathered evidence as widely as possible – from disabled people, disability charities and Disabled People's Organisation (DPOs), public authorities and car club operators. Our disabled user panel has been a great resource, and we are very thankful for all their and all stakeholders' contributions as we have gone through our co-design journey to identify opportunities to make car clubs more inclusive.

We knew from the outset that there would neither be 'one size fits all' solutions, nor solutions for all challenges, yet from this project's first coalescence it was our intention to find actionable solutions to take forward.

Car clubs already have offers in place for disabled drivers such as additional drivers and vehicle guidance. They are keen to do more. There are alternative operating models to consider too, for example by offering vehicle delivery services.

We dived in depth into all the issues that presented themselves such as terms and conditions; vehicle availability; affordability of the service; what need there is for a personalised service and the role of vehicle adaptations. We then turned to examining potential mitigations and solutions to these.

Bringing the findings from this work together, we have developed a clear vision for inclusive car clubs, covering three areas:

- **Communications and awareness:** Critical first steps include increasing awareness of car clubs amongst disabled people, improving user interfaces so as to be fully accessible for all, and equipping car club staff with the knowledge and skills to provide high quality support for disabled people, as and when needed. Improvements to information about the specifications of available vehicles in the car club fleet can also help users to find the right vehicle for their needs.

- **Operational models:** Flexible cancellation policies, transparent pricing structures, and appropriate and simple discount systems will reduce barriers to car clubs for many disabled users. This should ideally link with existing disability passes, avoiding additional unnecessary administrative barriers.

- **Physical accessibility:** While only a small proportion of disabled drivers require adaptations, for those who do – they are essential. An inclusive car club is therefore one which provides access to a range of vehicles with appropriate adaptations to suit a range of needs. Clear information on what adaptations are available is also critical to ensure users are able to make informed choices. In addition to adaptations, some disabled users may require alternative drivers, and delivery of the car club vehicle to their home and collection of the vehicle at the end.

To turn this vision into reality, we developed **a set of recommendations** that we hope will play a part in progressing towards real-world deployment of more inclusive car clubs.

1 Set up a pilot to test ways to improve customer and potential customer communications of existing car club operations to disabled people; to market this offering to disabled people; and to experiment with adapting the existing customer experience through measures such as improved staff training, more flexible cancellation policies and a discount programme for disabled consumers.

2 Pilot improving physical access to car club services through the use of adapted vehicles via use of flexible adaptation technologies that can be used, or not used, by a range of drivers with different needs.

3 Seek to build on the existing policy support for car clubs from Government, such as it is, to advocate for and aid their ability to put helpful policies in place that can boost disabled people's access to the cost, air quality, place, space and emissions saving option that is car sharing.

1 INTRODUCTION

Net Zero and the transport decarbonisation agenda requires that we reduce overall car use, and increase adoption of active, shared and public transport. At the same time, from the perspective of individuals, car ownership can be costly and inconvenient for some, and a lack of access to alternative forms of transport means many are disadvantaged. This leads to exclusion from employment, healthcare and social life; exclusion which disproportionately impacts disabled people.

Figures published by the Motability Foundation show that disabled people make **38 per cent fewer journeys** than non-disabled people and there has been little to **no improvement** in this **over the last 10 years**.

Source: Motability Foundation, 2025

A study carried out by the Government Office for Science (GOS 2019) found that "most disabled adults in the UK are restricted in full participation of leisure activities, and spending time with family and visiting friends". They also highlighted how these barriers affect access to work, with the unemployment rate in the UK for disabled people being 6.7 per cent in 2019. Despite this rate having reduced, it is still nearly double the national unemployment rate. The GOS also noted that where there are barriers to the use of public transport, disabled people are more likely to be excluded or incur additional costs to participate in society through taxi / private-hire charges. In addition, DfT evidence (2018)

It is absolutely crucial that disabled people are considered and involved as we innovate to achieve decarbonisation, to tackle the exclusion of disabled people and ensure equitable access to transport for all. This principle is also supported by government policy, as outlined in the UK Government's response to the Disabled People's Access to Transport report (DfT, 2025), which highlights the importance of inclusive transport solutions. Shared cars ('car clubs') are one such innovation which is proven to reduce car ownership whilst also bringing convenient access to transport for users. In many use cases it can cut the cost of motoring for people significantly while taking away the burdens of car ownership/sole-access leasing or hire purchase such as maintenance and repair, insurance, refuelling and taxation.

The 2023 CoMoUK Annual Car Club research identified 380 participants who had health conditions which are expected to last more than 12 months and which limit their ability to do everyday activities. Some of these participants provided quotes on the value of the car club to them and the barriers they face. This feedback from the participants indicated that the car club plays a vital role in enhancing the independence and quality of life for disabled users and those with mobility impairments. It provides a convenient and cost-effective transport solution, particularly for individuals who cannot afford to own a car. Members valued the flexibility it offers, allowing them to make essential journeys with confidence, whether for medical appointments, shopping, or social activities. However, some face challenges with vehicle availability and distance, which can limit accessibility at times. Despite this, the service remains a lifeline, reducing reliance on multiple forms of public transport and enabling users to support others with mobility difficulties.

The market share of car clubs, however, remains limited, and in particular disabled users of car clubs remain in the minority. Disabled people's particular range of needs and potential with regard to car clubs has never been mapped in any comprehensive way that appears in the public domain. Further, there has, to our knowledge, been no comprehensive design or piloting of improvement measures to make car clubs more accessible for disabled people. This project was established to bridge this gap, with the ultimate aim of supporting wider adoption of car clubs by disabled people. A user-focussed research project was delivered to identify and test solutions for making car clubs more inclusive. The method and findings from this work are described in the following sections.

This report is based on the principles of the Social Model of Disability, which states that people are disabled by a range of barriers that exist in society, rather than by individual bodies or minds. Barriers may be social, cultural, physical, environmental, institutional and economic, and impact different people in different ways. In this report we refer to 'Disabled people', and by this we mean anyone who faces barriers to accessing transport due to impairment(s). This includes people with both visible and non-visible impairments, and people who may or may not use the word 'disabled' to describe themselves. This work aimed to improve understanding of the barriers that impact access to car clubs specifically, so as to support wider adoption of car clubs in future.

2 METHOD

The project was delivered in two phases. The activities we undertook in each phase are illustrated in the diagram below, and further explained in the following sections.

2.1 PHASE 1 – BACKGROUND RESEARCH

Phase 1 of the study aimed to develop a comprehensive understanding of the existing landscape of accessible car clubs, a detailed list of barriers to usage, a summary of existing solutions, and identification of potential areas for future development. This was delivered by exploring the following questions:

- What are car club operators currently doing or considering in terms of making their services accessible to disabled people? What are the commercial and technical challenges faced in relation to delivery of accessible car clubs?

- What are disabled people's views of and experiences with car clubs? What do disabled people think of existing car club provision, what are the barriers to usage, and what are the views on solutions that exist already to improve accessibility?

- Where are the potential target areas in the UK where innovation could bring most benefit to disabled people?

Figure 1: Overview of the structure of the project and tasks completed
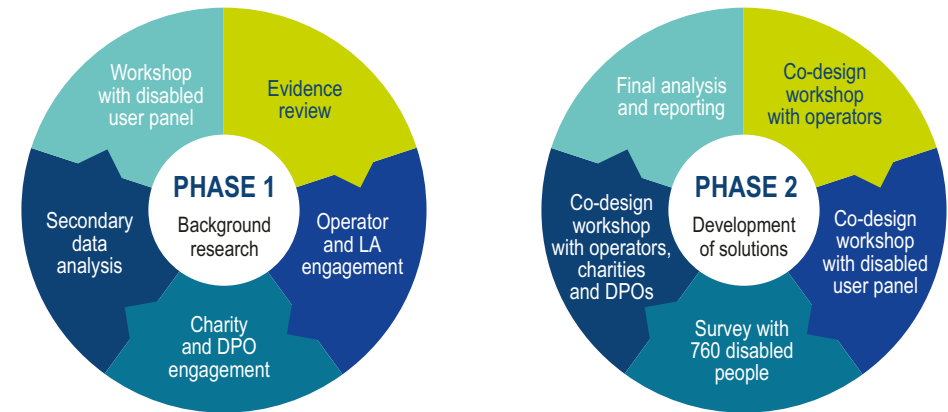
These questions were explored through five tasks detailed in the following sections:

1. Evidence review (Section 2.1.1)

2. Engagement with Car Club operators and local authorities (Section 2.1.2)

3. Engagement with disability charities and Disabled People's Organisations (DPOs) (Section 2.1.3)

4. Secondary Data Analysis (Section 2.1.4)

5. Engagement with Disabled User Panel (Section 2.1.5)

2.1.1 Evidence review

We conducted a structured review of literature and data from both the UK and abroad, focusing on the number and types of disabled customers using car clubs (where available), alongside literature on potential barriers faced by disabled users. We identified case studies of inclusive car club initiatives and evaluated their effectiveness. Our findings established the existing state of accessibility in car clubs, highlighting successes, shortcomings, and gaps. These insights informed key discussion points for stakeholder and end-user engagement.

Following identification of a longer list of 20 articles, ten papers were selected as most relevant and examined in detail as part of this review. The key findings are reported in Section 3.1.

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[1] Disabled People's Organisations, or DPOs, are organisations that are led and controlled by disabled individuals. Definitions vary, but commonly an organisation is considered a DPO if disabled people represent at least 50 per cent of staff. DPOs typically also align with the Social Model of Disability. Source: Disability Rights UK

2.1.2 Engagement with Car Club operators and local authorities

Engagement with car club operators was facilitated through CoMoUK's Local Authority (LA) forums and car club operator meetings. These meetings provided a platform for discussions on current and potential future solutions for accessibility in car clubs. We explored the extent to which accessibility was being considered in car club provision and the challenges and opportunities for improving inclusivity. Additionally, LA-only meetings on shared transport were utilised to gather perspectives on the role of local governance in enhancing accessibility of car clubs.

Details of feedback gathered from operators and LAs are reported in Section 3.2.

2.1.3 Engagement with disability charities and Disabled People's Organisations (DPOs)

Engagement with disability charities and DPOs[1] was undertaken to understand the views and perceptions of disabled people regarding car clubs. As key stakeholders, these organisations provided insights into the barriers faced by disabled people, potential ways to address the barriers, and any existing solutions, if any.

CoMoUK engaged with five organisations in an hour-long online conversation about the experiences of disabled people regarding car clubs. Findings from this engagement are detailed in Section 4.1.

2.1.4 Secondary Data Analysis

Secondary data analysis was conducted to identify potential locations which could be used for piloting new car club interventions in future. This involved examining the current distribution of car club provision across the UK, the dynamics of car club usage, and the geographical distribution of disabled populations. This analysis helped determine areas where innovation could yield the greatest benefit by aligning car club services with the needs of disabled users. Findings from this analysis are provided in Section 3.4.

2.1.5 Engagement with disabled user panel

A 'Disabled User Panel' was formed at the start of the project consisting of 27 disabled individuals, including those who currently drive with or without vehicle adaptations, those who have already used car clubs in the past and those open to using car clubs in future. Participants were asked to self-report the type of impairment they had (that is sensory, physical, or cognitive) to ensure the sample included a spread of impairment types. The panel was engaged through focus groups and interviews to explore their experiences with car clubs, their openness to using these services, and any barriers they faced. Three focus groups were conducted along with three individual interviews for those preferring not to engage in group discussions.

The following topics were covered in the focus groups and interviews:

- Knowledge, use and experience of car clubs, if any
- Benefits of car clubs and openness to using them more
- Potential and perceived barriers to using car clubs

Figure 2: Age and gender distribution of disabled user panel

The full topic guide used to facilitate these discussions is provided in Appendix A. Findings from the disabled user panel are detailed in Section 4.2.

2.1.5.1 Demographics of members of the Disabled User Panel

The Disabled User Panel included a total of 27 participants aged 18 and above. Participants had a range of impairments.

Twelve participants were female and 15 were male, ranging from 18-75 years old (see Figure 2).

Participants with sensory impairments were least represented in the engagement (see Figure 3).

Nine participants lived in urban areas, 14 participants lived in suburban areas, and four lived in rural areas. Majority (13) of the participants had never used a car club before (Figure 4).

Figure 3: Venn diagram of types of impairment participants stated they had

Figure 4: Distribution of car club awareness and usage of disabled user panel by area of residence

2.2 PHASE 2 – DEVELOPMENT OF SOLUTIONS

Phase 2 of the study focused on developing solutions to address the key barriers. We took an iterative approach to conduct co-design workshops with operators (Section 2.2.1) to ideate solution and, understand feasibility of delivering those solutions. These were then followed by engaging the disabled user panel in a co-design workshop (Section 2.2.2), and a wider sample of disabled users through an online survey (Section 2.2.3). Finally, operators and local authorities were re-engaged to determine which solutions can practically be trialled (Section 2.2.4) and inform development of a pilot in future.

2.2.1 Co-design workshops with operators

Following the initial engagement, car club operators were re-engaged in co-design workshops to develop potential solutions. These workshops focused on a range of solutions spanning hardware, software, communications and outreach approaches. CoMoUK facilitated these sessions, leveraging its extensive network to ensure broad participation and informed discussion.

2.2.2 Co-design workshops with Disabled User Panel

The Disabled User Panel was re-engaged in a series of co-design workshops to explore ways to make car clubs more inclusive. These workshops were collaborative and user-led, providing a space for participants to share ideas and deliberate potential solutions. Insights from earlier stages of the project were incorporated into the discussion, and participants were invited to provide open feedback and suggestions. One-to-one interviews were conducted for panel members who preferred not to participate in group workshops.

A total of 24 participants were involved in the co-design workshops. Participants had a range of impairments. There were 10 female and 14 male participants (see Figure 5).

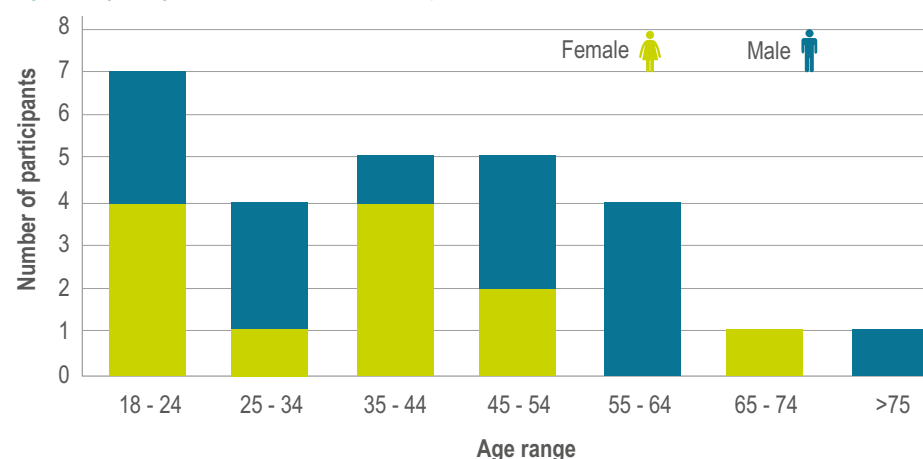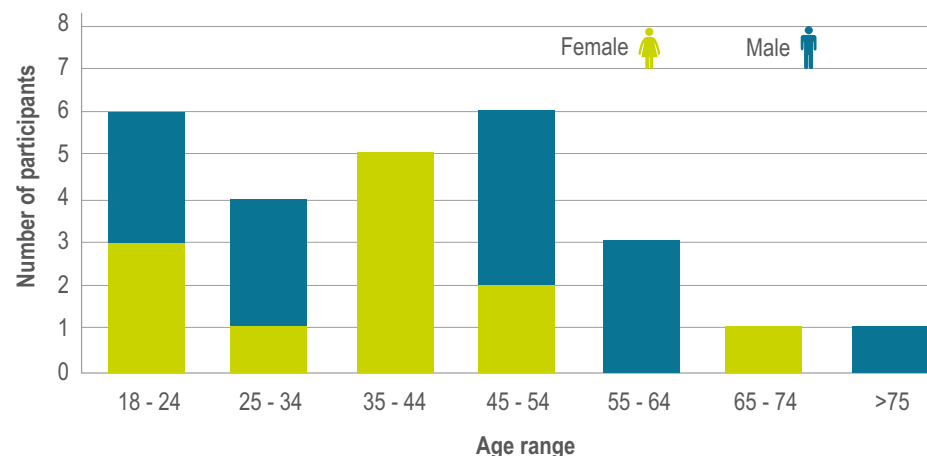**Figure 5:** Distribution of age and gender of disabled user panel for co-design workshops

The findings from the workshops are detailed in Section 5.1. The full topic guide can be found in Appendix B.

2.2.3 Ideas testing with a wider sample of disabled users

To gather broader feedback, an online survey was conducted with a sample of 500-750 disabled people. The survey aimed to be as representative as possible, assessing the appeal and potential adoption of different proposed solutions. The results provided valuable data on which solutions should be prioritised for pilot implementation.

Following the co-design workshops, we conducted an online survey with a wider sample of disabled people across the UK. We received a total of 760 eligible responses. The purpose of the survey was to gather data on the appeal of different ideas identified by the Disabled User Panel, car club operators, and local authorities for making car clubs more accessible. It also aimed to gather insight on the potential impacts on car club usage if they were to be implemented. The results from the survey were used to inform which ideas to prioritise in future pilots.

The survey responses are discussed in Section 5.1, along with findings from the co-design workshops. Respondent details are provided in Appendix C. The survey questions can be found in Appendix D.

2.2.4 Refinement of solutions with DPOs and operators

Based on insights from the ideas testing phase, representatives from disability charities, DPOs, and car club operators were re-engaged to refine and co-design an updated set of solutions. This iterative process ensured that the final solutions incorporated stakeholder input and addressed the key accessibility challenges identified earlier in the project.

Figure 6: Venn diagram of types of impairment participants stated they had
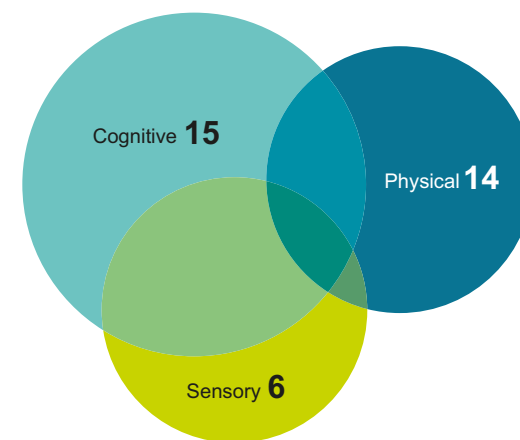
Figure 7: Distribution of car club awareness and usage of disabled user panel by area of residence
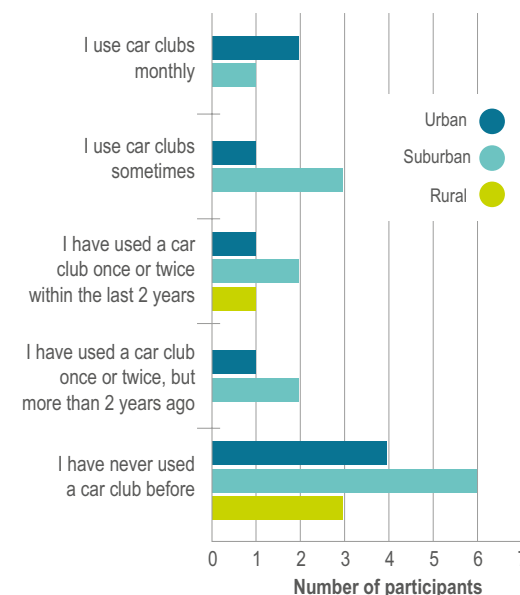
3 OVERVIEW OF CURRENT MARKET

3.1 FINDINGS FROM EVIDENCE REVIEW

The use of shared cars by disabled people has not been the subject of many pieces of academic research either in the UK or from other countries. This literature review drew upon findings from ten studies from the USA studies and the UK, which focus on new mobility services by disabled people as well as wider research into the accessibility of public transport.

Demand for car clubs by disabled people

Research carried out by Ruvolo (2020) with disabled users of shared cars in San Francisco, found there was some optimism about the value of new mobility services. Car club schemes can provide an alternative to the use of taxis at the same time as offering the benefits that public transport cannot, such as flexibility of time and space.

One respondent explained, **"I don't have a car here** (too expensive), **but I would love to use an accessible vehicle to go on day trips and get out of the city."**

Physical and cost barriers

However, the San Francisco study identified several barriers to use of car clubs. Nearly one third of survey respondents had experience with car clubs. Physical accessibility and cost were the primary barriers for respondents, with 41 per cent and 40 per cent percent of respondents identifying those factors, respectively (Figure 8).

Figure 8: Barriers to use of car sharing (reproduced from Ruvolo, 2020)

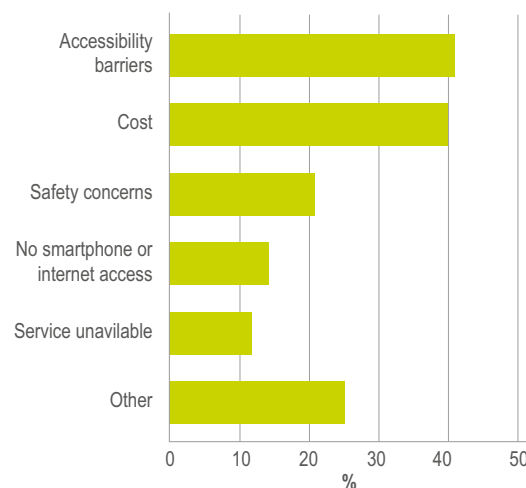This report doesn't elaborate on the nature of the physical accessibility issues and other papers reviewed didn't explore the issue of physical barriers or the use of adaptations in shared vehicles.

Technology barriers

A study by the American National Aging and Disability Transportation Center showed the uptake of shared mobility services is lower amongst older people and disabled people than other groups. They found that users were unfamiliar with the technology used to book services or were unable to use digital platforms. This was supported by two other studies, Urban Europe (2022) and Dill and McNeil, (2021), which also highlighted problems with poor interfaces for disabled people.

Non-drivers

The NADTC research also showed that volunteer drivers can play an important role in supporting older and disabled people who cannot drive. Research by Dill and McNeil, (2021) outlines how, in the future Autonomous Vehicles may provide added benefits of flexibility, reduced costs and space for wheelchairs, which taxis might not always offer.

Lessons from studies on public transport

To help inform our understanding of the use of car clubs by disabled people we can also draw upon the research into the barriers to the use of public transport such as work done by Neven and Ector. Some of the issues which they discovered related to public transport could be examined to see if they are relevant to the use of car club services, such as:

- The availability of services sufficiently close to user to access

- Navigational challenges of finding services

- The importance of predictable services which are being relied upon.

The research by Neven and Ector outlined solutions suggested by disabled traveller themselves to lower these barriers which included getting support from the driver or other passengers, or from GPS service on a phone. Preparation was a key theme to book services in advance, plan out a route, or have back-up support in case of problems.

Barriers on the ground

The Urban Europe 'Smart Hubs' project (2022) looked at how mobility hubs and the shared services they house can be made more accessible, for vulnerable users, including disabled people. The report recommends considering disabled people's requirements which choosing the location of services and using co-design to ensure the usability of the services and hubs.

Analysis of the inclusivity of shared transport in Glasgow, conducted by Clark and Curl noted that barriers to use can come in the form of physical issues, safety issues, information limitations, or coverage. Although the study looks at all aspects of social exclusion, the points are of particular relevance to disabled people.

The literature review provided a useful framing for the subsequent interviews and surveys, identifying key areas for further research.

3.2 FEEDBACK FROM OPERATORS

CoMoUK interviewed the four car club operators in the UK, Hiyacar, CoWheels, Enterprise Mobility and Zipcar, to understand the current position of use of car clubs by disabled people. Their feedback is summarised into three categories:

Car specifications

Co Wheels provided links to vehicle specifications to help disabled user choose the best model of car club car for their needs, for example, boot size or seat height. They reported that it can be hard to find details of new models. They requested help to find additional up to date sources.

Additional drivers

The main area in which car club operators reported providing support to disabled people was through the option to add up to three additional drivers to a membership for no extra charge. This allows disabled people who do not drive to book a car club car and allow friends, family or carers to drive for them. The two operators, Co Wheels and Enterprise Mobility who provided this model both reported there was limited take up and it wasn't something they advertise proactively.

Adaptations

None of the car club operators have included adaptations for disabled people within their fleet. One operator had investigated adding adaptations but their insurance had refused to cover the changes. Another operator directs disabled customers who need adaptations to their rental service. At their rental depots they work with a third-party fitter who sets up the vehicle to specification with 48 hours notice.

Wheelchair accessible vehicles

Another operator had previously had funding to add wheelchair accessible vehicles into their fleet in Aberdeen. There were issues with safety and ensuring each user had training in advance of their first hire. There was low take-up which affected the viability of including an extra vehicle.

3.3 FEEDBACK FROM OTHER SERVICE PROVIDERS

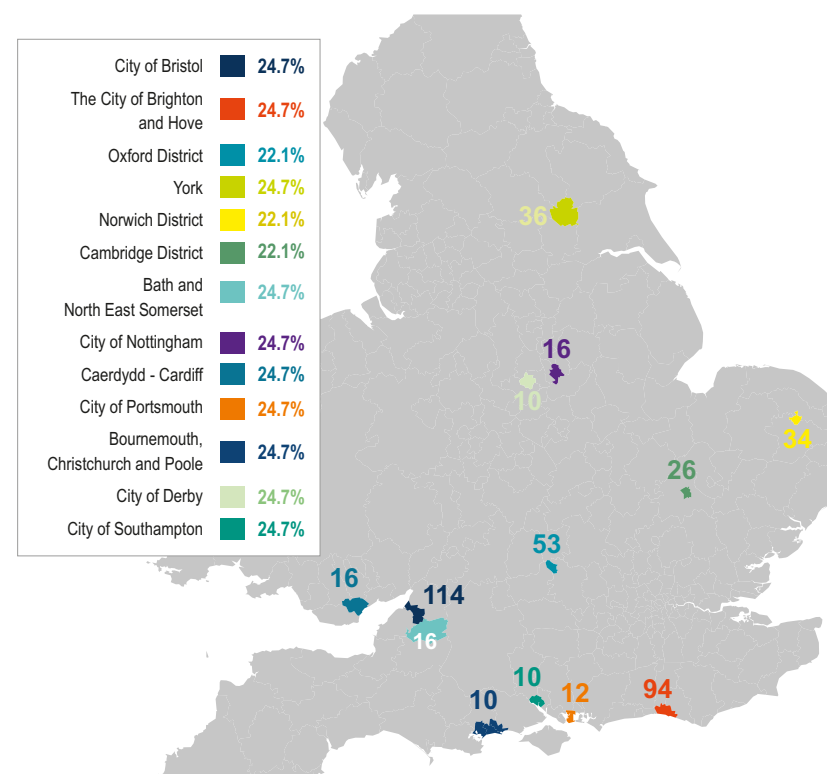**Specialist delivery and hire service**

The conversations with disabled people highlighted a service provider, Mobility Vehicle Hire Group who have created the Accessible Vehicle Club. They specialise in providing hires of a minimum of three days of adapted vehicles, delivered to a home address. The service is on a subscription model with options for different numbers of hires at fees from £125-£350 per month. This offers a cheaper alternative model to traditional leasing of a vehicle for those who only need a vehicle occasionally. It is not as flexible in the hire period and financial commitment as the pay by the hour, car club model, however it has the added advantages of offering any adaptations and delivery to the user.

3.4 FINDINGS FROM SECONDARY DATA ANALYSIS

CoMoUK reviewed the Census for 2021 to identify residents who had a long-term physical or mental health condition or illness, lasting or expected to last 12 months or more which it limited their day-to-day activities "a little" or "a lot". Those reporting conditions that limited their day-to-day activities a little or a lot were classified as disabled under the Equality Act (2010).

We also created a list of local authorities with more than 10 car club cars. This was then overlaid with areas which had 20 per cent+ disabled residents of driving age. The results are outlined in Figure 9.

Figure 9: Distribution of car club awareness and usage of disabled user panel by area of residence

City of Bristol	24.7%
The City of Brighton and Hove	24.7%
Oxford District	22.1%
York	24.7%
Norwich District	22.1%
Cambridge District	22.1%
Bath and North East Somerset	24.7%
City of Nottingham	24.7%
Caerdydd - Cardiff	24.7%
City of Portsmouth	24.7%
Bournemouth, Christchurch and Poole	24.7%
City of Derby	24.7%
City of Southampton	24.7%

The top six locations identified were, Bristol, Brighton, Oxford, York, Norwich, Cambridge. The list provides an indication of where pilot projects could work, however, other factors such as strong community DPO support and operator capacity should also be considered to inform the final choice of pilot locations.

4 CHALLENGES DISABLED PEOPLE FACE IN USING CAR CLUBS

4.1 FEEDBACK FROM DPOS

CoMoUK interviewed five representatives from disabled persons organisations: Transport for All, RNID, Disability Sheffield, Abilitynet and Driving Mobility. There was broad support for improving access to shared cars through car clubs, to tackle inclusion, make travel more affordable and reduce the impact on the environment.

The following themes were identified from the discussions.

4.1.1 Cost

All of those interviewed talked about the financial pressures on disabled people and the high cost associated of travelling with a disability. Disabled people have lower disposable income levels than the general population. They are less likely to find employments or have higher paid work. Many stated that the cost of running a car can be prohibitive. Insurance can be higher, and some adaptations may need self-funding.

The cost of getting a compliant vehicle for Clear Air Zones and ULEZ in London, can be a barrier. Blue badge owners are exempt from certain restrictions, for example ULEZ, but each blue badge owner can only register one vehicle. Most car clubs are exempt from ULEZ and Clean Air Zone schemes but if cars were not compliant, this may be a barrier for use by disabled people in some areas.

Those interviewed said that the fee for using a car club service with adaptations should not exceed that for others and ideally it would have reduced tariffs.

A question was raised about linking in funding which is available for access to work travel.

4.1.2 Lack of driving licence

Some disabled people who could drive an adapted vehicle have not applied for one for a few different reasons:

- To apply for a provisional driving licence, you need to state which adaptation you require and without the opportunity to try out different options you may not know and therefore may never apply for a provisional driving licence.

- The cost of applying for a driving licence and receiving lessons may be too high.

- The availability of suitable driving instructors may be limited.

4.1.3 Adaptations required

Representatives highlighted a range of adaptations available. At one end of the scale, some disabled people can use standard vehicles but need to know there is sufficient storage space for a wheelchair. Many fit in all cars but larger ones need deeper boots with lower tailgates.

Other disabled people will need controls to be brought up to the steering wheel. This is possible for the whole control of the car. The details of two companies which offer adaptations were shared:

- JDHC: https://www.jdhc.co.uk/space-drive/

- Lewis Reed Group: https://lewisreedgroup.co.uk/

Some disabled people might be able to bring their own kit if it is small and carriable. Otherwise, there would be a need for someone to do the adaptions locally. It would be useful to identify which adaptations would need to be added and

removed for each booking and which could be there for all hires.

For wheelchair users who cannot easily travel without their chairs there will be a need for Wheelchair Accessible Vehicles (WAVs). This might be for the wheelchair user to drive the car or to be a passenger. There is a lack of WAVs which are EV due to the battery needing to be below the floor.

4.1.4 Public realm design

When considering how the disabled person will get to the car club vehicle there will be additional considerations. For example, there may be a need to know where the dropped kerbs are for wheelchair users. Pavement parking could also be a barrier to access. Part of the solution would be to consult with local disabled groups. The use of a public car park may work better if it has better access.

The accessibility of EV charging units is key. Many disabled people say they don't look accessible although many haven't used them yet. There is a need for plenty of space around the units and for the cables not to be too heavy.

4.1.5 Digital inclusion

DPOs reported that 23 per cent of disabled people are non-internet users compared with 6 per cent of the general population. This is partly due to not having access to a device, for example, the cost or partly due to difficulty in using them.

Apps and websites should be compliant with Web content accessibility guidelines (WCAG). Although this is currently only enforceable for public sector. There are 3 priority levels:

- Complying with priority 1 issues gives you single A rating.

- To be AA you need to be compliant with priority 2 points.

- Rolls Royce is priority 3 level issues.

There are IOS and Android accessibility guidelines online.

It is recommended for the design to stick to core software and only custom coding if it is really needed. Standard HTML5 is inclusive and will pass WCAG, it offers several features to enhance the usability of audio and video elements and provide alternative text descriptions.

Interviewees recommend carrying out accessibility audits and co-producing apps and websites with disabled people. They should be tested with as many varied, user groups as possible. Also make sure forms are in a range of formats including paper and via a member of staff. Some said that the use of apps has increased among disabled people. They can help with some communication issues. They should be simple, not too many layers, very visual.

Important information on web and app should be translated into BSL for those with hearing impairments who cannot read. This is done via an icon which links to BSL. There is no standard for this as it is fairly recent and evolving. Increasingly AI is being deployed to provide seamless translations. It is also useful to have visual representations or video to show how to use something.

The use of VRS, video relay services, could be used to provide interpreting services for those with hearing impairments. If the operators have a contract with VRS, and a deaf member has any issues with the booking or a breakdown and need to contact the operator then the VRS will automatically be added to the call to translate.

For finding the car club location, a mix of methods was recommended, visual, maps etc. If someone got confused and can't find the car it would be important to be able to contact operator via VRS to get support.

4.1.6 Promotional channels

The representatives recommended working with DPOs and other disability groups to advertise schemes. They suggest a variety of media to reach the most people . For example, a poster in the GPs or a library as well as digital channels, social media and podcasts. The latter is more popular with younger people.

Discussions highlighted the need to take special care reaching those with sight and hearing loss whose access to traditional media is restricted. Advice from the DPOs was to utilise specialist channels favoured by disabled people.

DPOs and other disability groups can help to share communications. They are active in reaching out to community and consulting with users.

We were informed that Motability Operations are active in sending emails and could be a useful partner providing information about car clubs to their customers.

4.2   FEEDBACK FROM DISABLED USER PANEL

4.2.1 Knowledge, use and experience of car clubs

Nine participants indicated they had used a car club before. While 18 of the participants had not used car clubs before, many of them had heard of car clubs and knew about them to varying degrees. For participants who had heard of car clubs but not used them, their reasons varied from services not being available in their region, to a lack of nearby pick-up or drop-off locations, to assumptions about being too young and therefore ineligible to rent a vehicle.

The majority of the participants had a basic understanding of car clubs. Car clubs were generally (correctly) understood to offer flexible, pay-as-you-go access to vehicles, either through a membership or on a per-use basis. Some participants initially misunderstood the concept to be similar to that of traditional car hire services.

Many participants noted that the availability and coverage of car clubs varies by region, citing this as one of the reasons why they have not tried a car club service, despite knowing about the concept in general and recognising the potential benefits.

Many participants first learned about car clubs through advertisements, either online or in various media. Some discovered car clubs through personal experience (such as hearing from a friend or relative) or by living near car club bays, which prompted them to investigate further. Others found information through online searches, especially when exploring alternatives to car ownership or specific services like those offered by Enterprise.

4.2.2 Perceived benefits of car clubs and openness to using them

Participants perceived there to be a number of benefits of car club services, including the opportunity for cost savings and greater flexibility and convenience compared to private car ownership.

Many participants recognised that using car clubs can be more economical way of accessing a vehicle than private ownership, as they provide an option for mobility without the responsibilities and expenses of car ownership including high upfront purchase costs, and on-going running costs such as maintenance and insurance. Additionally, participants recognised the potential for avoiding congestion charges and not having to worry about long-term vehicle parking availability and cost. In particular, the option of having the vehicle be collected from and returned to another location was felt to be highly convenient for some. Participants felt that car clubs could be particularly useful for those who may otherwise rely on taxis or public transport. Aside from the economic benefit, participants who already use car clubs liked the sense of independence it afforded them.

Flexibility in terms of booking and using a vehicle as needed was also frequently mentioned as a key benefit car clubs. The ability to extend bookings when needed and return cars to various locations was considered convenient. Participants who had used car clubs before mentioned that their service providers offered flexible booking and cancellation options. They found this very helpful because it reduced the stress of making last-minute changes, for example, due to health issues, and enabled them to have a flexible transport option. One participant in particular repeatedly emphasised the overall ease of use and convenience of the car club service, and particularly valued that the service could be managed via a smartphone app.

One participant mentioned they were aware of a service provider that offered delivery of a car club vehicle to users' homes; this was considered a useful feature which can ease logistical challenges, particularly for people with reduced mobility. Although not universally available, some car clubs offer adaptations or specific services that could benefit disabled people, such as accessible vehicles and support services.

Several participants who had not used a car club before expressed they could not see clear benefits of using a car club. For those who cannot drive themselves, they were not sure how different the service would be from a taxi service if a driver comes along with the vehicle.

> "By the time you realise that all your access needs, it's just easier to taxi, because then there's not really a difference and it means to me to have someone that can help you get your destination."

4.2.3 Barriers to greater use of car clubs

This section presents the key barriers preventing greater use of car clubs by disabled people, as identified from engagement with the disabled user panel. Disabled people can face barriers to transport across the full 'end-to-end' user journey, from joining a service and making a booking, to accessing the vehicle and undertaking the trip, to finishing the booking. Each of these stages and the common barriers that impact them are discussed below.

4.2.3.1 Joining the service

Insufficient information about the service at registration

Many participants, particularly those who had not used car clubs before, thought the registration process can be difficult, especially if it's only available via an app or online. Relevant information needs to be easy to find and simple. Key information such as pricing, availability of vehicle models, vehicle pick-up points, and insurance coverage should be easily accessible to help users make an informed decision about registering and using the service. Participants suggested simplifying the registration process by offering multiple channels for sign-up, such as phone, in-person, and online options.

> "I have a question about insurance. What happens in an accident, are you covered? Are there any hidden charges? What is covered within that?"

Participants who had used car clubs before said they were able to find all the information they needed and comfortably make bookings using the app.

> "I am quite tech orientated [so apps] work for me with my disability, so actually being able to do it myself and not have to rely on anyone to book it in for me and it was kind of easy self-service"

Accessibility of the registration process

Some participants noted that too much information can be burdensome for some people so there needs to be a balance in how much information is presented on a single webpage. It was suggested that operators need to ensure compliance with website accessibility standards, for example, by signposting information appropriately using clear and concise headings, implementing expandable sections, navigation menus, or adding links such as 'Read More'.

> "Having some kind of information online because so many places don't have any disability information or if they do it's just you know this is the one thing that we can offer you… being able to at least sign posts you to where you have to go [to find this information]"

Length and complexity of Terms and Conditions

Participants reported that, typically, the complexity and length of Terms and Conditions (TandCs), particularly regarding disability, can be a deterrent to usage. Participants advised that, in their experience, TandCs were typically lengthy documents and it was felt that the onus was on the user to find information relevant to them, instead of service providers directing people to the relevant information. Participants suggested that terms and conditions concerning disability should be simplified and summarised to make them more user-friendly.

> "Even just summarising [that] we can cover this, this and this, but not that. Because having that information reassures me much more that at least I know they're thinking about this kind of stuff and it's not on me to have to do all the research."

Challenges with receiving personalised support

Several participants expressed general frustration with having to provide the same information about their disability repeatedly to receive appropriate support. When thinking about car club services, they expressed the need for more personalised support when users with accessibility needs set up an account. They suggested that this could include:

- Having a trained customer service assistant who could speak with the user to understand their needs and make recommendations as to appropriate vehicles / ways of using the service.

- More comprehensive filter options when searching for vehicles, to include things such as existence of dropped kerbs at pick-up/drop-off locations, door opening widths, and so on.

- A system that remembers the personal needs of each user to reduce the burden on the user each time they need to make a new booking.

Feedback also suggested that participants who use a service and have a good experience are more likely to reuse the same service than to try a new service, due to the perceived hassle of providing information about their accessibility needs.

> "Having a dedicated hotline or customer service [with a person who has] disability awareness training, and you can talk to them about different needs. Having a menu like a drop-down menu as well of you know if you're looking for a car that has enough space around it to get in and out of a car."

4.2.3.2 Booking a vehicle

Concerns about lack of availability of particular types of vehicles

Some participants believed that some fleets will not have vehicle models that fit their needs. For example, one participant had signed up with a car club but never hired a vehicle, as they found that only vehicles with low floors were available, meaning it did not meet their needs.

"It's really tough to get access to vehicle in a public space where it's supposed to be at a reasonable height for everyone, or even a different type of model. I think the car club here in Edinburgh is more small or city cars, which is still not good enough for majority of us. It shouldn't be one-size-fits-all."

"Whenever it listed the accommodations that are available on the website, there wasn't a huge amount of information on how those accommodations would come to be. It was always with a phone number below. So I think it puts a lot of responsibility on the disabled person to sort of have to keep advocating for their needs rather than having all the information that you would want available"

One participant noted that automatic vehicles are often limited in availability and are typically more expensive compared to manual vehicles, which is unfair to those who can only drive automatics. Participants believed that this problem could be alleviated by ensuring that the service provider has a variety of different vehicles available in sufficient numbers in order to make the service usable by most people.

"You're limiting a lot of people. I think most everyone could drive automatic, not everyone can drive manual for example."

Concerns regarding vehicle specifications

Participants stated that a lack of clear information about vehicle specifications reduces confidence in making a booking. They expressed that they would like to have information such as vehicle model and size, door opening widths, and boot space available to help them determine if the vehicle will meet their needs. Ideally, an image of the vehicle model should be provided as well to assist customers with decision making. Some participants indicated they would like more tailored support. For example, rather than service providers relying solely on a checkbox indicating 'wheelchair user' on the registration form, instead organisations should directly consult with users to understand their specific needs. It was noted that an electric wheelchair requires significant boot space, and this detail would not be captured with a single 'wheelchair user' box.

"...guarantee that the car would meet my specifications and if there was any need for replacement, they would let me know with plenty of warning and make sure it meets my specifications rather than just assuming."

"Some people would use a mobility scooter, so maybe details on if the vehicle is fitted with a hoist and boot size should be included."

Difficulty in checking vehicle availability

Some participants noted that they do not like the uncertainty of not knowing when a vehicle is available for booking. They thought such information should be made easily available to users to allow them to make bookings when they needed, without having to give a lot of notice.

"So, what's available and how and what the days is available for... I wish they had an app where I could see what is the all membership where what is available, you know so I can use it you know from a number of days that I need it for."

"It [provision of different models] is very good. The concern is, does it actually match the reality? They may have numbers to call or different types of vehicles, but they may not always be available because they have limited numbers of that model."

Concerns about affordability of the service

Some participants expressed the need for a discount scheme for disabled people to ensure it is affordable for them. It was raised by participants that many disabled people require financial support already and it was felt that it may not be affordable to use car clubs at full price over the long term. This aligns with research indicating that disabled people are more likely to experience poverty compared to the general population and are disproportionately affected by financial hardship (Scope, 2025). A few participants suggested a loyalty discount scheme would be beneficial, where a user could claim a discounted or free hire after having used the service for a given period.

"Would there be like a discount if people [are] using benefits or you know proof of disability, et cetera"

"Maybe, like, a loyalty tickets, things, you know? About 8 journeys. Get your 9th one free."

Two participants mentioned that cost of hiring an automatic vehicle should not be higher than that of a manual vehicle, as it usually is based on experience with car rental companies. Participants noted that users should not be penalised for not having a manual driving licence, and the cost of hiring both automatic and manual vehicles should be the same.

Concerns about the cost of using vehicles with adaptations

Participants who had not used a car club before expected that it would be expensive, and concerns were raised about incurring additional costs with hire of adapted vehicles or accessible customisations. Participants felt that they should not be financially penalised for requiring extra support due to their disability.

Concerns about costs relating to late cancellations

Several participants felt that users should not be financially penalised for making last minute cancellations. Two participants who had used car clubs before noted that they had not been penalised for last-minute cancellations in the past and found the process very simple and easy.

"I think that would be great if the company themselves took that on board and realised, yeah, like the energy companies [do], when you have like a vulnerable person's register. So basically, saying this person has this [condition] and this [scenario] might occur. So, if it does occur, there's no penalisation for that person."

"Because somebody cannot help it if it's suddenly something flares up or plays up, or you don't feel like it or you're not well enough or you're in pain, you can't [make the journey]."

4.2.3.3 Leaving home and finding the vehicle

Distance required to travel to the vehicle

Participants with mobility impairments expressed that they did not want to travel too far from their home to the pick-up/drop-off location of car club vehicles. Some participants expressed this was less of a concern for them, however, they would be discouraged to use car clubs if they required a taxi or public transport to get to the vehicle. They felt it would defeat the purpose and add extra cost and effort to use the service. Many participants expressed that they would be more likely to use the service if the vehicle locations offered were closer to them or delivered to their door. One participant who had used a car club before noted this as the main barrier that stopped them from using car club services more often.

"We'd often end up then cancelling the booking because it was more of a faff to get on the bus or the train or like to get a car or it just wasn't close enough or the one we wanted wasn't available and that really did become quite a big access need and was one of the big factors of us then buying our own car"

"It will be location for me as well. I've just checked on Google and the nearest one I would find is 7 mile away. So, I've got to travel on a bus or a taxi 7 mile or jump into a car. Do you know what I mean? I just don't understand the point of it."

Accessibility of car club parking locations

Some participants noted that car club parking locations could be inaccessible. Such instances can hinder their ability to use the service independently. Inaccessible parking locations, for example areas without dropped kerbs, or cobbled streets, should be generally avoided as this will benefit all users and not only those with accessibility needs.

"I would always be on the lookout for access if it's a cobbled street that's going to be really annoying and difficult to try and navigate in my chair so. Yeah, those kinds of things would be my concerns is like the surroundings of where it's parked."

4.2.3.4 Unlocking and getting into the vehicle

Concerns about availability and setup of adaptations

Some participants require specific driving adaptations, such as hand controls or specially adapted seats, to safely and comfortably operate a vehicle. Although there were not many participants in our sample who used these, participants expressed concerns about whether these adaptations would be available for those who need them, and whether they would be easy to set up independently. Participants who mentioned needing to use adaptations also noted that they already owned the necessary equipment in their own (adapted) car. However, there may be users who do not own the equipment and it may be necessary for operators to provide it. Where possible, participants would prefer having adaptations already set up as it would reduce effort on them.

Assistance required with vehicle entry and exit

Some participants mentioned needing additional support when getting in and out of a vehicle. This could include physical assistance from another person, or the availability of features such as grab handles. It was felt that provision of tailored support would be necessary to alleviate this concern.

"For me, I need to have a car of a certain height because I can't get out if it's too low and I can't get in if it's too high and would need support to get in and out."

Concerns regarding changes in vehicle specifications

Participants were concerned about the risk of a vehicle model or specification being changed after a booking had been made, as is sometimes the case with traditional car hire services. There were concerns that the replacement vehicle may not meet user's needs, potentially leaving them unable to complete their journey. Where certain vehicle specifications have been requested to meet an accessibility requirement, assurance should be given to customers that any replacement vehicle will also meet the same requirements. Participants suggested that sudden changes to bookings could cause anxiety; such changes should be communicated with care, particularly to users who may have noted an access requirement during their registration process.

"Sometimes when you get a [taxi service] or something, they sometimes change vehicle halfway to you and then you know, that new vehicle could not be accessible when the first one was. So I'd be really concerned about that."

Technical difficulties, for example, with unlocking a vehicle

A few participants who had not used car clubs before raised concerns with unlocking vehicles using apps or cards, particularly if their phone runs out of charge or if Bluetooth connections fail. It was suggested that users should be provided with alternative methods for accessing vehicles in case issues with technology arise.

"What happens if your phone runs out of charge? Because no phone means no car?"

Participants also raised a need to have quick and easy access to support in case of an emergency, or if something goes wrong during their journey. This could include a dedicated hotline or in-app support feature that connects users directly to assistance. The availability of this service and the process for using it would need to be clearly communicated to users at the point of booking a service. By providing reliable and accessible emergency contact options, car club operators can enhance user confidence and safety.

Checking the vehicle for damage

Some participants who had used a car club service before said on occasion they had been charged with a fee for damages that they were not responsible for and felt that there needs to be a stricter process to avoid misplacement of charges. To address this, there was a suggestion to implement a thorough check-in process that records the vehicle's condition before and after use. This would reduce concerns about potential blame for pre-existing damages.

One participant mentioned that whenever they use car clubs, they feel it necessary to assess the vehicle for any superficial damage (for example, dents and scratches). They explained that they take pictures of any damage as a means of evidencing that the damage was there prior to their use of the vehicle, for fear that the vehicle provider would accuse and charge them for the pre-existing damage. It was felt to be an inconvenience having to spend time doing these vehicle checks.

"You get blame for because they haven't been notified [about pre-existing damage] by the previous hirer."

4.2.3.5 Undertaking the journey

Reliability of functions within the vehicle

Two participants highlighted specific needs related to their conditions: one required the ability to play music, while the other needed to control the vehicle's temperature. For these individuals, these features are crucial for managing their mood and seizure conditions, respectively. Whilst only two specific examples, they underscore the importance of ensuring that technical aspects of the vehicle, such as audio and climate control systems, function reliably.

"Quite a lot of the time it's been really difficult to connect your Bluetooth to play music or get the maps onto the screen in the cars. It's quite important for me to have loud music in the car to regulate [my emotional state] and that becomes more difficult if the Bluetooth doesn't connect."

4.2.3.6 Leaving the vehicle and going to destination

The concerns participants expressed in this stage of the journey were similar to those mentioned in the 'Leaving home and finding the vehicle' stage above. Participants were concerned about the location of car club parking and the distances they would have to travel to the ultimate destination following vehicle drop-off.

Ability to park in undesignated spaces during emergencies

One participant raised concerns about being penalised for parking the car club car in an accessible parking bay that is not a designated parking space for car club, for example, during emergencies. The participant wanted to know whether the Blue Badge[2] scheme would be applicable to car club parking, as they were concerned about being penalised for parking in undesignated parking spaces during emergencies. Many in the group agreed that this, while not applicable to them, could be a concern for others with particular access needs.

"So when you park in somewhere in an emergency. Can you identify yourself? You know, as a disabled person and not get a parking ticket, you know, within reason."

Designated parking spaces

Participants were presented with the two ways of returning a booked vehicle in current car club operations. These involve either returning the vehicle to a parking bay or a parking area:

6. Parking Bay – This car must be returned to their unique designated parking place.

7. Parking Area – The car must be returned to a specific designated area, usually a street or two.

Parking Bay method

Some participants preferred the Parking Bay method, believing it guaranteed a designated spot. However, others were concerned about the spot being occupied by another vehicle, which could force them to park further from their destination.

To address this concern, participants suggested assigning a specific parking space to each vehicle, ensuring availability upon arrival. Another suggestion was to allow users to inform, via the app, if all designated Parking Bays were occupied to ensure that they won't be penalised for parking elsewhere.

Parking Area method

Those who preferred the Parking Area method liked that it gave them more flexibility in choosing where to park. However, some participants were concerned about being able to find an unoccupied or suitable space in the designated area. Similar to the Parking Bay method, some participants worried that if no spaces were available in the designated area, they might have to park further from their destination. As such, participants suggested allowing users to inform the service provider if all parking spaces in the Parking Area were occupied to ensure that they won't be penalised for parking elsewhere.

[2] The Blue Badge scheme allows badge holders to park in places other drivers cannot. It is linked to the person rather than a vehicle, so it can be used with any car, including taxis and hire cars that they are driving, or when travelling in as a passenger.

Concerns about vehicle safety in parking bay/ parking area

Participants expressed concerns about the security of the vehicle, fearing potential damage when left on the street. To address these concerns, participants suggested using monitoring such as CCTV which would provide some reassurance that users would not be held liable for any damages done to the vehicle after drop-off.

Additionally, they highlighted the importance of providing disabled parking spaces, irrespective of parking method.

"if you're disabled, you need plenty of space at the side to get in and out"

"I would look out for if its parked in a disabled bay, so there's extra room on the sides and round the back so that you can get in and out easily or, if there's curb drops on that street because otherwise I'd have to be in my wheelchair in the road"

4.2.3.7 Barriers impacting multiple stages of the customer journey

Access to a hotline or emergency contact

Several participants who had not used car clubs before mentioned that they would need to be able to contact the operator for support in the event of something going wrong (for example, difficulty unlocking the vehicle, needing to cancel the booking, needing someone else to take over driving, being unable to find an unoccupied parking space, etc). Participants

suggested that operators should give users quick and easy access to support in case of an emergency or if something goes wrong during their journey. This could include a dedicated hotline or in-app support feature that connects users directly to assistance. The provision of this service would need to be communicated to the user clearly upon booking a vehicle. Those who had used car clubs before noted in the past they have received quick responses from operators and did not encounter any problems with accessing support. This may suggest that this could be a perceived barrier among those who have not used car clubs before, or it could be indicative of the people who have used car clubs before having a different set of needs to those who have not.

4.2.3.8 Post journey

Two participants noted that if they have a negative experience with car club services at any point during the customer journey, for example, from 'joining the service' to 'leaving their vehicle', they would be unlikely to use the service again. This feedback suggests the need to address any prior negative experiences encountered by users in order to reestablish trust and build confidence. Implementing a feedback mechanism to enable evaluation of how services can be modified could be one way to drive continuous improvement in the overall user experience.

4.3 Key barriers to address

Overall, the findings from engagement with the Disabled People's Organisations and 27 members of the disabled user panel indicated that while some participants were aware of car clubs and their potential benefits, such as cost savings, reduced environmental impact, and added convenience, in general participants did not perceive there to

be specific advantages of car clubs for disabled people. Some participants had not used car clubs due to limited availability in their area, inconvenient parking locations, or assumptions about age restrictions. The findings highlight several key barriers to the effective uptake and appeal of car clubs from the perspective of disabled people in UK. We summarise these below in three distinct categories: communications; physical accessibility, and; operational model-related barriers. This categorisation aims to clarify the nature of each challenge and to inform the development of potential targeted solutions.

Communications-related barriers include low awareness of car club, insufficient knowledge of car clubs services, and provision of clear and accessible information relating to how to use the service, specifications of vehicles available for booking and additional support available. To address these, providing key information about the service in a clear and simple manner at registration is crucial. Many users may not proceed beyond this step without clarity about the service and their obligations as a user. Improving communication channels to provide tailored advice from appropriately trained staff and ensuring that users receive timely and clear information can mitigate these issues.

Physical accessibility-related barriers include the need for tailored support, such as assistance with vehicle entry and exit and the provision of vehicles with certain specifications or vehicle adaptations. Due to the broad impact of different impairments, it is noteworthy that there is no single solution to address all accessibility needs. The support provided by operators needs to be customised to meet the user's needs. This could be ensured

by having disability-trained customer support services to ensure user needs are met and that necessary adaptations are readily available. Additionally, including different vehicle models to meet different access requirements will enable inclusion of a wider range of people.

Operational model barriers are concerns relating to affordability of the service and hiring adaptations, and feasibility of volunteer driver scheme. Although car clubs can cost less than ownership for some, there were concerns about the costs of using the car club service without discounts, and concerns about cancellation fees. Reassessing the service model to make the service more affordable by offering discounts or not charging extra for adaptations or a volunteer driver could make the service more appealing.

5 POTENTIAL SOLUTIONS FOR MAKING CAR CLUBS MORE ACCESSIBLE

5.1 FINDINGS FROM DISABLED USER PANEL AND SURVEY

5.1.1 Improving confidence in being an inclusive service

Raising awareness and advertising channels

The survey results showed that the top channels for ensuring car club adverts reach more disabled people were through clinics, hospitals, local health centres (58 per cent), and partnerships with disabled charities and organisations (57 per cent), followed by local councils (56 per cent) (see Table 2).

Table 1: Where should car clubs advertise in order to reach you?

Preferred advertising channel	Count	%
Clinics, hospitals, local health centres	437	58%
Via disabled charities and organisations	430	57%
Via local councils	423	56%
Social media (e.g. Facebook)	387	51%
TV	332	44%
Via online disability support groups (e.g., wheelchair travel group)	295	39%
Radio	197	26%
Billboards	158	21%
Other	21	3%

Some participants felt that advertisements could make a car club feel inclusive by showing disabled users in adverts. They also encouraged car clubs to display badges or certifications from disability organisations, signalling a commitment to inclusivity such as AccessAble Accreditation[3] , and Purple Tuesday Partner[4]. One participant suggested offering trial periods at reduced rates, allowing users to test the service before committing long-term.

Building confidence in car clubs through user reviews

Participants in the disabled user panel said they valued transparency and suggested including user reviews and photos of vehicles to improve trust and aid decision-making. Currently, many participants reported using sites like Trustpilot to check for reviews as they considered these to be independent from the operators, and thus more authentic and reliable. Some participants felt they would not trust user reviews on operator websites as much as third-party sites, as it was felt that the reviews might be 'curated' to present a positive image. It was also suggested that this could be improved by displaying both positive and negative reviews, with an option to filter for accessibility-related reviews, which could help to build trust and encourage more disabled users.

5.1.2 Information and support

Provision and presentation of relevant information

Findings from the focus group in Phase 1 highlighted that the information about the service and provision of additional support were not communicated effectively. The available support and services were described to participants and they were then asked to rate how useful the information currently presented was, how it could be improved, and how can it be better communicated to encourage greater uptake of car clubs by disabled people.

Participants in the disabled user panel reacted positively to having a dedicated webpage on car club websites to provide clear, upfront information tailored to disabled users. Participants added that essential details such as vehicle specifications (for example, seat height and space for mobility aids) should also be easily accessible and well-organised on the same dedicated webpage. This accessibility page should be continuously updated to reflect common user questions and feedback, making it a dynamic, user-centred resource.

"I think there should be a dedicated page saying seat height from the pavement, available for service dogs, etc – everything that a person with additional needs could potentially need to know."

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[3] Businesses and venues can receive an AccessAble badge after an accessibility audit, showing that they provide detailed access guides for disabled people.

[4] Businesses participating in Purple Tuesday, a movement promoting better experiences for disabled customers, can showcase their commitment through branding.

"It's really important. For me, I need to have a car of a certain height because I can't get out if it's too low and I can't get in if it's too high."

Some participants also recommended that information relating to insurance, particularly insurance policies for volunteer drivers, was clear and avoided 'small print' excessive jargon. They expressed frustration with lengthy terms and conditions with heavy use of jargon, which could be simplified through bold headings and sectioned summaries.

Results from the online survey with a larger sample of disabled people shown in Table 3 that information about costs was most important for all three disability groups. Other types of information about practicality of using the car club services (for example., booking, unlocking, and leaving a vehicle, what to do in an emergency), vehicle specifications, the availability and setup of driving adaptations, and the cancellation policy and discounts applicable to a disabled person were considered similarly important to know at the point of signing up for a car club, but less so than the costs.

Table 2: What type of information is most important for you to know before registering for a car club membership?

Option	Sensory	Physical	Cognitive
Information about costs related to additional support before.	64%	68%	66%
Information about the specifications of the vehicles available to decide if it meets my needs.	41%	43%	34%
Information about how to book, unlock, and leave a vehicle at the end of my booking.	35%	42%	40%
Information about discounts applicable to me as a disabled person.	27%	40%	38%
Information about what to do in an emergency.	36%	36%	37%
Information about the availability and setup of necessary driving adaptations.	43%	35%	36%
Information about the cancellation policy applicable to me as a disabled person.	24%	32%	31%
None of the above.	4%	4%	6%
Something else (please specify):	0%	1%	0%

Improving support through digital systems

Most car club services rely on digital systems for booking and communication, for example some require a facial identity check, require users to book via app or require users to use their phone to unlock vehicles. These systems may not be accessible and may put some users off. Participants were asked what operators could do to support people to use digital systems, aside from being compliant with web and app accessibility standards.

Many participants in the disabled user panel called for a streamlined, accessible digital interface with intuitive menus, minimal steps, and clear navigation. Participants noted certain design elements of digital systems with features such as large text, bold visuals, and pre-recorded instructional videos that show users how to complete essential actions, including booking and cancellation processes.

"Just making the apps as simple as possible. Not like some apps where you open it and there are multiple menu options to 'do' things from."

"Maybe just ensuring they have a simple website with a live chat so you can speak to someone if you're having issues."

Participants also recommended providing a well-structured help section, which could include video tutorials to help those new to the platform without requiring real-time interaction, which can be particularly challenging for some people. For users familiar with apps, an accessible interface that prioritises simplicity and user-friendly design would enhance independence while retaining flexibility for additional support.

These findings were supported by the online survey; the most commonly preferred methods for operators to provide assistance, both with registration and booking, and in general, were via a web page and mobile app (see Figure 10).

Figure 10: Which of the following would be the most useful method for the car club operator to provide assistance?
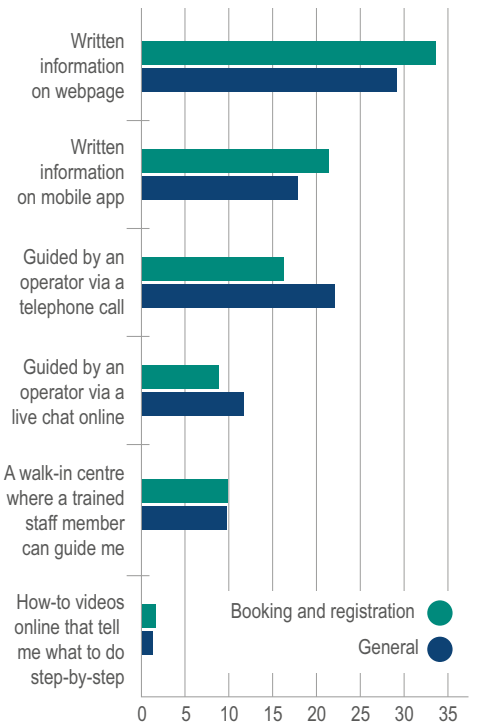
Alternatives to online services

As highlighted above, most participants expressed preference for using digital platforms but also emphasised the need for providing alternatives, recognising that not everyone is able or willing to use online services.

To make digital support even more effective, many participants recommended integrating phone-based or live-chat assistance, alongside digital options. There was a strong preference for human support over automated bots, which were frequently perceived as impersonal and ineffective. Participants suggested that support could include an option for guided, real-time assistance over the phone during initial registration, booking, or vehicle collection, enhancing confidence for first-time users. Participants also proposed receiving text or email summaries after support interactions for easy reference if they needed it after the call.

"Some people can't easily use a digital option, so having a telephone option where you can speak to someone over the phone to make your booking would be useful."

"Definitely not a bot thing. I think a phone call can be the best thing, even if I know something – it would be good to talk through a process and be assured that my understanding is right."

Where in-person support is unavailable, participants suggested an online forum may be beneficial, allowing users to pose questions and receive answers from either the community or car club representatives.

Sharing disability information

Findings from Phase 1 highlighted the need to provide personalised support for disabled people. Having well trained staff was highlighted as key factor influencing the use of car club services. Participants in the co-design workshop were asked how they felt about sharing their disability

or access requirements with car clubs, what was the best method of communicating this need, and what sort of training should car club staff complete in order to deliver better personalised support.
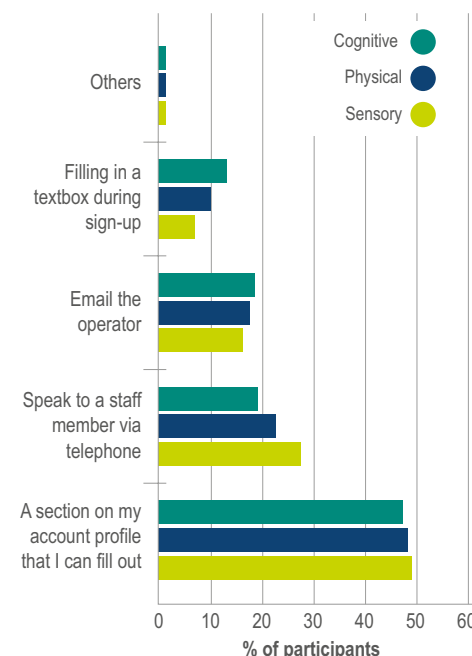
Most participants in the disabled user panel felt comfortable sharing their accessibility needs with operators if doing so led to a smoother experience. They suggested providing a mix of checkboxes and free-text fields for capturing accessibility needs during the sign-up process, enabling users to document essential requirements without feeling obligated to share personal or sensitive details about their condition. Many participants indicated preference for having their accessibility needs stored on their profiles, making it quick and easy to integrate these requirements into each booking. It was felt that this streamlined, up-front approach would reduce the need for frequent customer service contact.

"It would be great to have it all on your account, so you don't have to mention it every time. It's so tiring having to constantly contact customer service to set these things up."

This was supported by survey results, where the majority respondents indicated they would feel most comfortable with communicating their accessibility needs to operators via their account profile (see Figure 11).

Two participants from the focus groups suggested using systems similar to the Access Card which stores verified accessibility needs for easy reference. An Access Card serves as a photo ID that communicates a person's accessibility needs to venues and online platforms, translating accessibility needs into symbols to ensure appropriate

Figure 11: How would you feel most comfortable communicating information about your disability or access needs?

adjustments are provided. It is designed to streamline the process of communicating one's access needs, eliminating the need for repeated explanations at different venues.

Staff training

Participants in the disabled user panel underscored the importance of comprehensive training for car club staff to ensure they are able to support people with a range of impairments, including visible and non-visible impairments, neurodiversities and mobility impairments. Participants recommended that staff training cover use of respectful language, empathetic communication, and adaptability

in accommodating various accessibility needs. They also felt that training should occur regularly, not just annually, and should involve interactive sessions with people with lived experience of disability which was felt to be more effective than traditional lecture-style sessions.

"There needs to be more patience and understanding. Take the time to understand the issue, present information clearly (and slowly if necessary), and this obviously relies on the person themselves knowing what they're talking about."

"I think they need to know more about people's disabilities and needs so that they can tailor to the person's needs."

Several participants suggested that car clubs should establish a dedicated team who have received advanced training on certain types of accessibility support and this team could serve as the main point of contact for users needing tailored assistance. For example, there could be one team member with specialist knowledge of wheelchair/mobility aid use who could easily guide a user to the most appropriate vehicle for their need. It was felt that having a specialised team would foster smoother, more knowledgeable support for those with accessibility needs, especially in complex cases that require nuanced understanding.

The key factor mentioned by the majority of participants that would greatly boost confidence in car clubs' accessibility was having well-trained staff who are knowledgeable and, when unsure, demonstrate patience and empathy in trying to meet the needs of disabled individuals.

5.1.3 Service model

Discounts and loyalty schemes

Almost 77 per cent of the survey respondents said that they expected some discount or flexibility in other ways when using car clubs (see Figure 12). There was no indication that people with certain types of impairments (that is sensory, physical, or cognitive) were more or less likely to expect a discount on car clubs.

Figure 12: Participants' expectations around receiving a discount on car club fares, grouped by impairment type
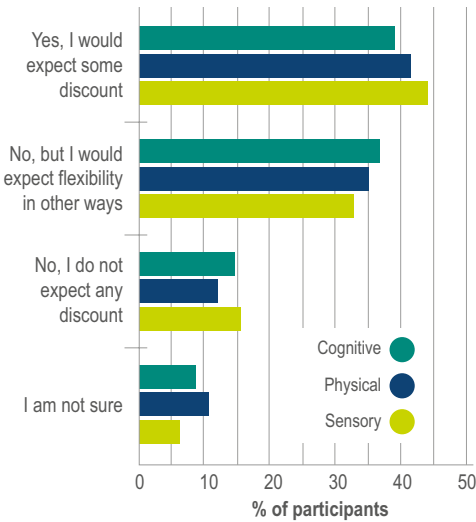
Some participants from the disabled user panel and in the online survey (14 per cent) stated that they did not necessarily expect discounted prices for disabled users. Instead, for the Disabled User Panel, it was more important that prices are consistent across vehicle types and clearly stated to help with decision making. They felt that it was unreasonable to charge more, for example, for a larger vehicle if that is the only vehicle that is accessible for a disabled user.

> "If you're offering people discounts for disability, make them clear and upfront. It shouldn't be a secret or something you have to dig around for."
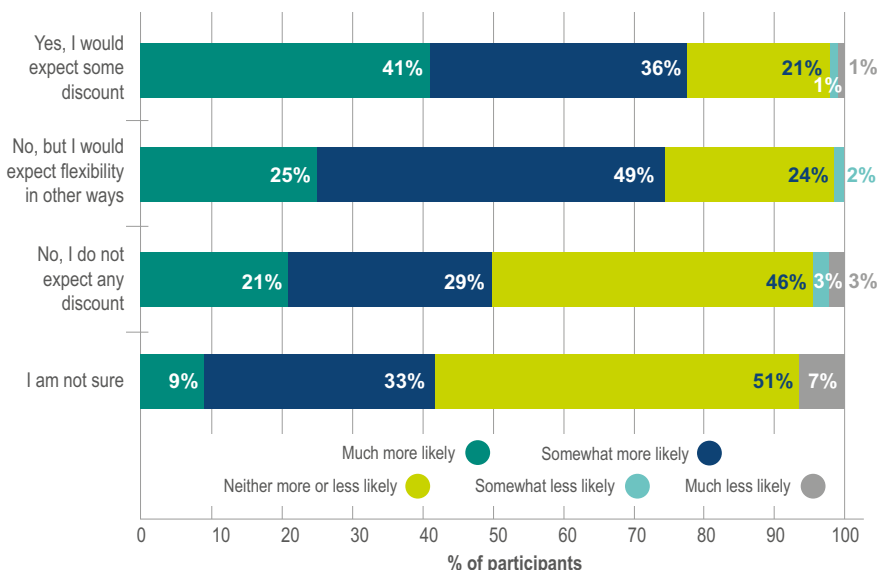
Participants in the disabled user panel widely supported a discount of 20-30 per cent for disabled users, seeing this range as both fair and sustainable for car clubs. Operators were supportive of the idea of testing discounts to see what interventions help to break down barriers and increase use. Results from the survey showed there was a significant variation across the sample in the suggested acceptable discount rate, from as little as 5 per cent to as much as 100 per cent, however, the average of 25 per cent broadly aligned with findings from the disabled user panel. A simple, flat-rate discount is preferable, as complicated or fluctuating offers could create confusion.

> "I think it should be the same as whatever benchmarks are already out there – for example, 30 per cent off a railcard."

Many participants in the disabled user panel suggested implementing a loyalty system, where users could accumulate points and redeem them after regular usage, similar to frequent-flyer or rewards programmes. Participants noted that users could prove eligibility for discounts by showing their existing disability passes, such as bus or rail passes, to simplify verification.

Almost 70 per cent of survey respondents said that if appropriate discounts were implemented they would be more likely to use car clubs (see Figure 13). Those that expected a discount more commonly said that they would be more likely to use car clubs.

Figure 13: The extent to which having an appropriate discount would influence a participant to use car clubs

Cancellation policies

Many participants in the disabled user panel in Phase 1 stressed the need for flexible cancellation policies, particularly due to the unpredictable nature of certain impairments. In the co-design workshops, we presented an overview of the current cancellation policy, particularly focusing on the free cancellation window and the penalty for cancellations outside of the free cancellation window. Currently of the four operators in UK, Operator 1 allows cancellations at least 5 hours before the reservation, with a charge of up to £30 for late cancellations. Operator 2 requires cancellations or changes at least 3 hours in advance; otherwise, the full reservation amount is charged. Operator 3 mandates a 24-hour notice for cancellations, with a 50 per cent fee for late cancellations. Operator 4 permits cancellations up to 2 hours before the reservation, with the full amount charged if cancelled later.

They expressed that ideally it would be possible to cancel a booking up to 2-3 hours before the start. They were very discouraged by policies requiring at least 24-hours' notice as this was deemed impractical, for some people health conditions can change suddenly requiring adjustment to plans. Similarly, slightly over 60 per cent of the survey respondents agreed/strongly agreed that disabled people should be offered a different cancellation policy applicable to them (see Figure 14), however there was no clear consensus on what this should look like in practice.

> "That wouldn't work for me at all because my condition can literally change within an hour, so any sort of cancellation fee like that would put me off using that provider."

Figure 15 shows that having a flexible cancellation policy was very/somewhat important for slightly over 80 per cent of the survey respondents. The results are similar to feedback from the focus group sessions suggesting that offering flexible cancellation policies for disabled people can make services more appealing to them.

A few participants had no strong views on the current cancellation penalty. Some felt a fee aligned to a percentage of the booking cost was fair for cancelling at late notice, while others preferred a fixed fee for greater clarity on liability.

Participants said they would like car clubs to make cancellation policies clear at the outset, preferably as part of the sign-up process or with a pop-up reminder before booking. They indicated they would like an easy, low-stress cancellation process, with minimal steps and clear instructions such as a clear button to proceed with cancellation rather than needing to contact a representative or having to fill out a long form. They also recommended operators provide confirmations via email or text, allowing them to review and refer to the cancellation details if needed.

Walking/wheeling distance

Findings from Phase 1 indicated that some disabled users may face barriers getting to the vehicle to pick it up. We discussed ways this barrier could be addressed in the co-design workshop. Participants were asked what the maximum distance they were willing to walk or wheel to in order to get to the vehicle was.
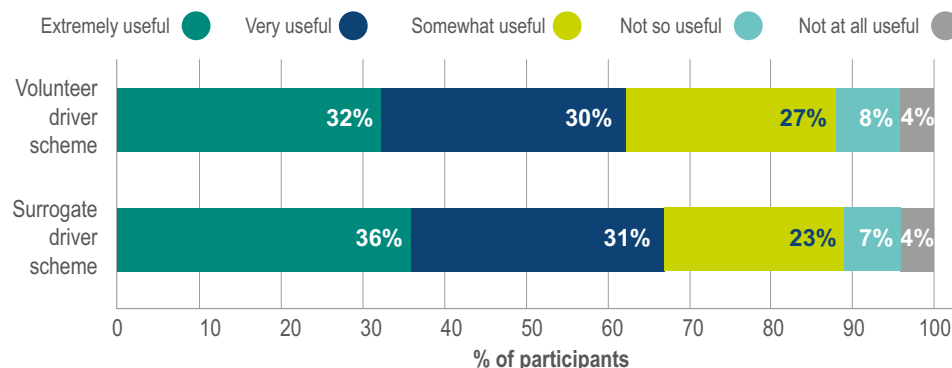
Figure 14: The extent to which participants agree or disagree that disabled people should be offered a different cancellation policy applicable to them
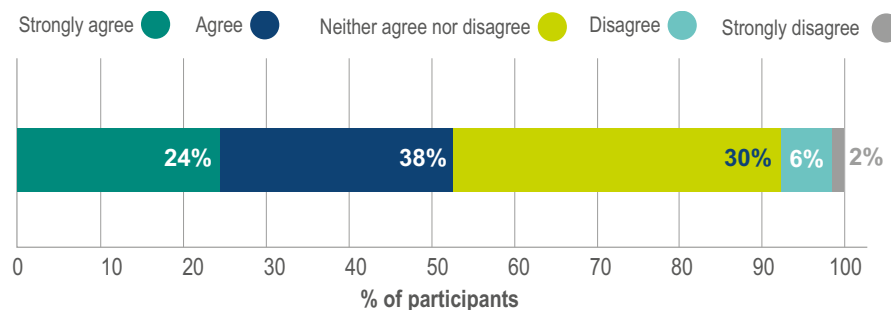
Figure 15: How important or unimportant is it for participant to have a flexible cancellation policy?
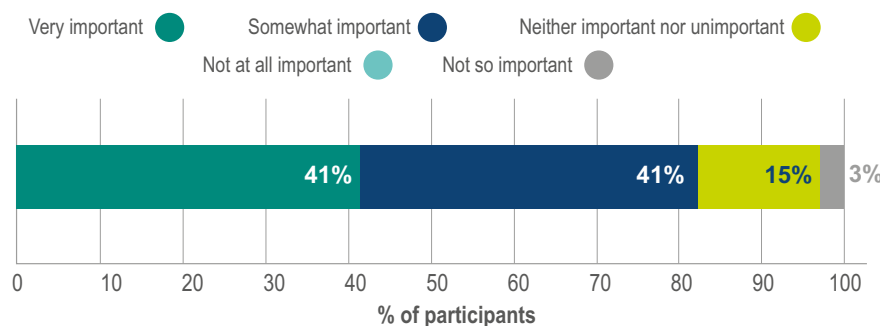
Figure 16: The extent to which participants found a volunteer or surrogate driver scheme useful to them

Feedback from both the disabled user panel participants and respondents to the survey suggested that preferred distances to reach a vehicle varied depending on participants' mobility needs, with some requesting vehicles be delivered directly to their door and others willing to travel short distances of around 500 metres. There were some extreme outliers in the distances that participants stated they were willing to walk or wheel, ranging from 0 to 64,000m. Values at the high end of this scale are likely indicative of some people poorly estimating distances, or making an error with units. After removing clear outliers in the data, it can be inferred that a maximum distance of 1,000m would appear to be suitable for the majority. Participants in the disabled user panel noted that a short, or no, walking/wheeling distance was essential for those with very limited mobility or in cases where people need to carry bags or mobility equipment.

Volunteer driver and surrogate driver options

Another way to address the barrier of getting to the booked vehicle was to offer to deliver the vehicle to disabled users' door on request, or provide access to a volunteer driver through one of two schemes: a volunteer driver scheme or a surrogate driver scheme. The volunteer driver scheme is where a car club partners with a local charity to enlist volunteers who will bring the car to the users' door. The surrogate driver scheme allows disabled users to nominate up to three drivers who can drive them on their booking.

The idea of a volunteer driver scheme, either arranged directly through the car club or via a third-party such as a local charity, received positive feedback from participants in the disabled user panel, especially as an option for those unable to drive themselves. They also agreed that the option to designate a surrogate driver or family member would also be valuable, especially for those with specific support needs.

Many noted the scheme would be highly beneficial if it was reliable and staffed by individuals familiar with accessibility needs. Feedback from survey participants supported these findings, with the majority of respondents indicating the volunteer and surrogate driver scheme would be very or extremely useful for them (see Figure 16).

Some participants in the disabled user panel raised some concerns, however, highlighting that car clubs would need to ensure consistency in driver availability and maintain high standards of reliability to make the service effective. Participants recommended that car clubs incorporate a 'buffer time' at the beginning and end of bookings specifically for volunteer or surrogate drivers who may need extra time to collect and deliver the vehicle to the user's location. This buffer would account for the logistical steps involved in the pick-up and drop-off process, such as travel time from the car's original location to the user's residence and any additional time needed to navigate to the exact spot where the car is required. Adding this extra time would ensure that the booked rental period reflects only the time the user is actively using the vehicle, rather than charging the user for the added time needed for accessing the vehicle. This would offer a fairer billing structure and reduce stress for users who rely on others to drive the car.

5.1.4 Summary on feedback on solutions

The feedback gathered from disabled people, disability organisations, car club operators, and local authorities highlighted key changes that could enhance the accessibility and overall experience for disabled users of car clubs. Prioritising clear communication, user-friendly digital interfaces, and comprehensive support systems are crucial in building trust and encouraging greater participation. In summary, potential solutions include the following:

8. Provide a dedicated accessibility section on websites and apps that provides essential information on vehicle specifications, insurance, and accessibility options. This should be continuously updated based on user feedback.

9. Ensure the digital system is intuitive and user-friendly with large text, bold visuals, and simple navigation, in line with the latest WCAG. Video tutorials should be available to assist users with key tasks such as registration, booking and cancellation.

10. Provide accessible alternatives to online systems such as phone-based or live chat assistance. Incorporating an online forum for user interactions could also expand the number of support options when in-person help is unavailable.

11. Store users' accessibility needs on their profiles. This can be captured using checkboxes and text fields during sign-up and stored on the user profiles for easy integration into future bookings.

12. Prioritise comprehensive, on-going accessibility training for staff ensuring they have the skills and understanding necessary for providing professional, respectful and effective support for disabled people. Establish a specialised support team to enhance the provision of tailored assistance.

13. Implement a discount and loyalty scheme. Implement a clear-cut discount of 20-30 per cent for disabled users and establish a loyalty system that allows users to accumulate points. Eligibility for discounts should be linked with existing disability passes to ease the process of verification.

14. Offer free cancellation up to 2-3 hours before a booking, with clear, minimal steps for cancellations and timely email or text confirmations detailing the process.

15. Provide a vehicle delivery service for users with limited mobility, including services like volunteer driver and surrogate driver schemes to enable more disabled people to use the service.

16. Raise awareness about accessible car clubs through a range of channels, particularly through clinics, hospitals, local health centres, and partnerships with disabled charities and local councils. Include disabled users in advertisements to make car clubs appear more inclusive and appeal to disabled people as a viable alternative to public transport.

17. Display certifications from disability organisations to instil trust among disabled people and signal a commitment to inclusivity on car club websites using existing accredited scheme such as AccessAble Accreditation3 and Purple Tuesday Partner4.

18. Offer trial periods at reduced rates to allow users to experience the service before long-term commitments.

19. Introduce a user reviews section that showcases both positive and negative user reviews, especially regarding accessibility to build trust among disabled users. If operators already have a user review section, they could consider making the review section more prominent and allow users to filter reviews based on accessibility-related experiences that will further enhance the searching and decision-making process.

5.2 FEEDBACK FROM OPERATORS AND DPOS ON THE FEASIBILITY OF SOLUTIONS

The four largest UK car club operators (Co Wheels, Enterprise Mobility, Hiyacar and Zipcar), were consulted alongside the following disabled people's organisations: Transport for All, Abilitynet, Into Independence and Driving Mobility.

A summary of the possible solutions to address key barriers identified in Section 4.3 is discussed below. Areas where operators stated they could use more support to develop accessible solutions have also been noted below.

5.2.1 Solutions for communications-related barriers

Raising awareness

Operators were supportive of testing different approaches to raising awareness of car club use with disabled people. The operators welcomed the opportunity to represent disabled people in their marketing and online images.

Ensuring compliance with Web Content Accessibility Guidelines (WCAG)

WCAG compliance has been included in the specifications of operator websites as it is a requirement for local government contracts. However, testing is often automated and comes up with variable results. The operators would value help in gathering feedback from disabled users.

Operators offered to run online familiarisation sessions for groups, telling them how to sign up and use the system but due to privacy issues they can't complete applications. They offer telephone registration for users for those unable to do it online or by phone.

Making relevant information more prominent

There were several ways in which operators already provide support which they agreed could provide more prominent information for disabled people on their websites, such as:

- Options to call for support, rather than book online
- Flexible cancellation polices
- The option to add volunteer drivers at no extra cost.

Accessible customer support service

All operators offer call centre support for those who cannot get what they need from the website or app. Call centre staff will talk to members who have problems with a booking, this could be extended to disabled people who want help on their first trip. Providing extra help may be easier where there are clusters of disabled people located within a specific area or in specialist accommodation, for example.

Operators would appreciate guidance on what sort of additional help may be required and what the training call centre staff would need to better meet disabled customer needs.

Access of information should be thought about for BSL users as well

There was interest in testing a flag or series of flags integrating personal accessibility preferences into user profiles, tailored to what extra help is needed. The operators asked for guidance on the wording of how to implement this in a sensitive way. Feedback from the representatives of the disabled people's organisations emphasised the need to focus on access needs rather than asking about health conditions. The group agreed that there was a need for more detailed work on the 'design' of the forms.

Information on car specifications

One operator provided links to vehicle specifications to help disabled users choose the best model of car club car for their needs, for example, boot size or seat height. They reported that it can be hard to find details of new models. They requested help to find additional up to date sources.

5.2.2 Solutions for physical accessibility related barriers

A discussion about the difficulties disabled people faced getting to the car club bay raises a few possible solutions.

Ensuring designated parking bays are accessible

Operators have a limited influence on where parking bays are placed but there is a need for a set of standards for parking bay development which would benefit all users. All parking bays should be well lit (but avoid having a lamppost blocking the door), with good access and CCTV. Specialist advice was required when it came to auditing the space around a car club parking bay. They were open to working with user groups as even local authorities don't always have these skills or training in house. The space around the boot will depend on how the car is parked. Surfaced car parks are easier to manage and design than on-street.

Provision of adaptations

Operators felt that some DIY access aids to get into and out of the car such as the Car Caddie handle, HandyBar grips, or leg lifters which are relatively inexpensive user aids and don't need fitting, can be stored in the glove box. These aids could be provided in identified cars to allow passenger access.

Enterprise Car Hire provide adaptations fitted by experts in their depots, not in their self-service fleets. They reported that hand-control devices were the most requested adaptation. Swivel seats, hand and foot controls for steering, and use of the pedal etc, will require storage, tailoring and specialist fitting for the vehicle on each use to ensure they are safely fitted. The operators felt this may be beyond the scope of unattended car share (as opposed to car rental from an office which can often supply these). A representative from Into Independence highlighted that there were specialist controls for disabled people which can be fitted in a way which doesn't hinder drivers using the usual controls. There were questions about whether adaptations affect the insurance of the vehicle.

Wheelchair accessible vehicles

Operators have had difficulty deploying WAVs in the past due to safety and training issues and low take-up affecting viability. They felt it would only work if they could identify a user base, preferably through an organisation or residential facility with a high number of users to cover the expense of provision. Alternatively, if there are already shared vehicles (for example, Community transport schemes) then using car club telematics technology could enable them to be more effectively shared.

Alternative drivers

The offer of adding extra drivers to the membership for no extra cost was welcomed by the DPOs. Two of the operators offer this already with low take-up suggesting further promotion and clarification is needed. There was a discussion about whether there is a need for DBS checks on buddy drivers who originate from local charities or whether this would have already been carried out.

Volunteer driver for delivery

The option of using volunteer drivers could be adapted to support the disabled driver with getting access to the vehicle rather than driving the whole trip. There was further discussion about testing volunteer delivery through a charity partner or volunteer drivers. There were concerns about the resources required to source and train volunteers.

5.2.3 Solutions for operational model related barriers

The topic of 'validation of disability status' was discussed as an interesting challenge. DPOs offered help to design a system which is simple to administer but offers choice of methods for the user, the use of the Blue Badge or codes on the Driving Licence were suggested.

Discounts

Operators were open to testing different discount options, but they would want to understand what the viable economic model is for offering discounts, and this requires information on usage. A pilot may be a useful way of working this out.

More flexible cancellation charges

Operators vary in the cut off period after which they charge a cancellation fee. The fees are there to dissuade customers from cancelling at last minute and limiting the ability of the vehicles, which is key for commercial viability. However, there was an understanding that health conditions can vary from day to day and a willingness to explore the use of shorter cancellation periods.

6 CONCLUSIONS AND RECOMMENDATIONS

The report findings highlight key areas where access to car clubs for disabled people can be improved. We propose efforts to enhance user experience, build trust, and encourage greater participation among disabled people by addressing these challenges. We group these into three main themes: communications; operational model improvements; and physical accessibility.

The vision for inclusive communications:

There is a need to increase awareness of car clubs amongst disabled people, explaining how they work and pointing out the potential benefits for disabled users.

We propose a full audit for the accessibility of car club websites, apps and communications to make sure they are as optimised as possible for disabled people. This should ideally include user testing with a range of disabled people as well as making car clubs' offer to disabled people prominent and itself easy to access.

We see a need to investigate whether car club staff would benefit from specific training in relation to disabled peoples' needs.

We also see a need for comprehensive information about the accessibility of each car club vehicle on the fleet.

The vision for inclusive operations:

Flexible cancellation policies would help disabled users by recognising the unpredictable and variable nature of certain impairments. For example, the ability to cancel up to 2-3 hours before a booking.

A simple discount system for disabled users, ideally linked to existing disability passes, would make pricing more accessible and easier to understand.

The vision for physically inclusive car club services:

In the longer term and subject to funding, there would be a range of vehicles with appropriate adaptations in the car club fleet. While the research showed only a small proportion of users are likely to require adaptations, they are essential for those who do. Ensuring this information is readily available would allow users to make informed choices and avoid unnecessary barriers.

For some users, there may also be a need to offer a delivery service whereby car club vehicles are delivered to users' homes and collected at the end of their booking. Providing options to have alternative drivers other than the primary user would also facilitate access for some people – alternative drivers may include a carer, friend or family member, or a volunteer registered and pre-approved by the car club operator. As with vehicle adaptations, provision of clear information on these services is critical so that users are fully informed.

6.1 RECOMMENDATIONS

To translate the vision and the proposed solutions from this research into reality there is a need to secure funding to pilot some of the specific solutions proposed. This will provide an opportunity to test different approaches and assess which are effective, practical and viable.

The findings from the pilots will inform development of a roadmap on how to roll out the best solutions across the UK car club fleet.

The recommendations set out below are divided into strands building upon the vision for inclusive car clubs. The first addresses the communications and awareness raising improvements, operational model improvements and supports greater use of the existing car club fleet for those who do not need vehicle adaptations. The second addresses physical accessibility and focuses on how to make changes to the fleet to widen accessibility through provision of vehicle adaptations. In addition, there are some further overarching recommendations to conclude this section.

RECOMMENDATION 1: Set up a pilot to improve communication, awareness raising and the operational model for disabled consumers using standard car club vehicles.

We propose the first pilot focusses on testing solutions to improve awareness of existing car club options amongst disabled people, improve communications with disabled customers and address operational considerations. This pilot should:

High quality, supportive communications with car club staff. The vision also requires telephone interactions with car club staff to be supportive, respectful, empathetic and with a focus on individual needs. If appropriate systems are put in place there would not be a need for disabled users to repeat their access needs on each call.

Improve information about specification of vehicle available. To help disabled users find the right vehicle for their needs there needs to be a reliable and up-to-date database of car club vehicle specifications.

- Test different approaches to increase awareness through a mix of targeted outreach approaches via social media, traditional advertising, and disability-focused groups and publications to reach a wider audience. Car club operators would be supported to widen their reach and ensure disabled users are presented in adverts to foster confidence among disabled users, as well as carry out an audit of their websites and apps to ensure they meet WCAG, testing them with a range of disabled people. The review should include an assessment of the online information for disabled people, and the clarity over the support available, vehicle specifications and options to add additional drivers.

- Trial the introduction of an appropriate integrated system flag to add information about access needs to the user profile, including eligibility for reduced fees.

- Provide support to car club operators to put in place a regular staff training programme to improve support for disabled people, involving collaborating with people with lived experience instead of passive learning through lectures.

- Trial more flexible cancellation policies that recognise the unpredictable nature of certain impairments. A shorter cancellation window, such as the ability to cancel up to 2-3 hours before a booking, would provide necessary flexibility while maintaining fairness in policy enforcement.

- Trial a discount system for disabled users, ideally linked to existing disability passes, to make pricing more accessible and easier to understand. Discounted fees for disabled people should be trialled to understand effectiveness and viability.

RECOMMENDATION 2: Set up a pilot to improve physical access through the use of adapted vehicles.

We propose that the second pilot aims to further expand car club accessibility and widen participation through the provision of vehicle adaptations in the car club fleet. This pilot should test the addition of a range of adaptations to car club vehicles. The focus will be on adaptations which can be fitted in such a way that they can be used or not used by a range of drivers with different needs. This approach could allow the adapted vehicles to be used by all users, ensuring greater flexibility and maximising fleet efficiency. There will be two main categories of adaptations to be trialled:

- Transfer aids which help with access such as additional handles, leg lifters and swivel seats, and:

- Controls which aid driving such as hand controls for accelerating and braking or steering.

Crucially, the pilot will first test the safety of drivers using vehicles with adaptations in a controlled off-street environment. This is a critical first step to mitigate the potential risks of introducing adaptations into vehicles which are shared by multiple drivers, including people who may not need the particular adaptation. For adaptations to work within the car club model, the adaptations must not hinder access for some users or reduce safety of operation. Piloting will enable testing of this, including the extent to which extra controls, for example, can be safely 'ignored' by drivers who do not need them.

The regulatory implications, including licensing and vehicle type approval, of implementing the proposed adaptations in the car club fleet will need to be investigated to deliver the pilot. It will also require exploration of staff training needs, insurance barriers, popularity of different types and models of adaptations as well as the cost and viability of rolling out successful solutions to the wider fleet. The pilot would then test a viable set of adaptations in real-world deployments.

Additionally, we propose the pilot engages with communities who could benefit from adding car club technology to an existing wheelchair accessible vehicle to facilitate self-service sharing to a wider group of people. This might be a retirement home or supported living complex with a range of drivers who wish to streamline their booking system or provide shared access to additional local groups.

RECOMMENDATION 3: Build funding and policy support from central and local government for inclusive car clubs

This report recommends working with DfT and any other relevant agencies and parts of Government to ensure there are opportunities to improve the profile and use of car clubs generally, alongside boosting their inclusivity through new policy and funding streams. The Zero Emission Vehicle Mandate, which favours supply from car makers to car clubs above any other option, is a welcome signal of intent, as has been the opening up of the main taxpayer funding source for EV chargepoints (the LEVI fund) to bids from authorities which can include car club use. However, these stand alone as policies favouring car club, which is limiting the sector's growth and viability and consequently its ability to innovate. There is a significant opportunity for Government to adopt supportive measures that could include a focus on increasing access to car sharing services by disabled people.

The English Devolution Bill, assuming it is enacted, heralds the biggest shake-up of local government in England for decades. Transport is one of Government's focus areas as it seeks to create new, more strategic, entities at local government and also devolve more power to them and to existing combined authorities. There is therefore a potential opportunity to use this as a platform to raise awareness amongst such strategic transport authorities in car clubs and ways to improve transport accessibility.

To build upon the lessons learnt from the research and the proposed pilots, there is a need to convene all key stakeholders with a role in developing inclusive and accessible car clubs. The development of an annual summit bringing together car club operators, local and central

government and disability organisations is one approach that could be considered. Discussion should focus on lessons learnt from the pilots and the mechanisms and resources to roll out improvements across the UK, helping to shift knowledge into action.

We summarise the applicability of these recommendations to four main stakeholder groups: car club operators, funding bodies, the Department for Transport and Local Authorities. (see Table 4).

Table 3: Summary of the applicability of recommendations to stakeholder groups

	Recommendation 1: Pilot of inclusive communications	**Recommendation 2:** Pilot of adapted vehicles	**Recommendation 3:** Accessibility Summit
Car club operators	✓	✓	✓
Funding bodies	✓	✓	✓
Department for Transport			✓
Local Authorities	✓	✓	✓

7   COMMUNICATIONS AND AWARENESS

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8 APPENDICES

APPENDIX A

PHASE 1 TOPIC GUIDE

Agenda

- Introductions
- Knowledge of car clubs (covers use and experience of car clubs)
- Benefits of car clubs and openness to using car clubs more
- Potential and perceived barriers to using car clubs
- Debrief

Questions

1. **Introductions:** Can each of you tell us a bit about yourself? You could tell us your

   - name and
   - a little bit about you (the area you live in, and if you're comfortable sharing about your relationship to disability please feel free but you don't have to)
   - and whether you have used a car club service before or not.

Section 1

This section is going to focus on your usage of and experiences of using car clubs. We are going to touch on what journeys you use them for, how you book and what encourages you to book a car club.

2. For those who haven't used a car club before, how much do you feel you know about car clubs? What questions do you have?

3. For those who have used car clubs before, where did you hear about it?

4. What factors influence your decision to use or not use a car club?

Section 2

This section is going to focus on your usage of and experiences of using car clubs. We are going to touch on what journeys you use them for, how you book and what encourages you to book a car club.

5. For those who haven't used a car club before, how much do you feel you know about car clubs? What questions do you have?

6. For those who have used car clubs before, where did you hear about it?

5-10 minutes break depending on time

Section 3

Next, we're going to explore the benefits / potential benefits of car clubs, what would encourage you to use car clubs more frequently in future, and what might help those who don't currently use car clubs to do so in future.

7. What do you think are the benefits, if any, of using car club services from your perspective?

For those of you who have used a car club service before, what aspects made it easy for you to use car clubs, if any?

Section 4

This section is going to focus on the barriers which prevent or make it difficult for you to use a car club service more than you already do. We will explore some of the barriers or challenges you may have faced in your experience using car clubs before, or those you would anticipate would be an issue.

8. What concerns or access needs would need to be addressed before you would feel comfortable using a car club service (more)?

I'd now like us to talk through the different stages of using a car club, and discuss what works well and what is challenging.

9. How do you currently find the following stages of using a car club? Think about both what has or would work well and what has been or would be challenging for you.

   a. Joining the service/ making a car club account

   b. Booking a vehicle

   c. Leaving your home and finding the vehicle

   d. Unlocking the vehicle and getting ready to drive/getting into the passenger seat

   e. Driving, or (if you are not driving) being a passenger

   f. Leaving the vehicle and going to destination

   g. There are different models of how to return vehicles.

The first is 'back to bay', which is the most common car club model, whereby cars must be returned to their unique designated parking place.

The second model is 'back to area', whereby the car is to be returned to a small, designated area, usually along a street or two.

   h. Has anyone used a 'back-to-bay' model? What worked well, if anything? What was difficult, if anything?

   i. Has anyone used a 'back-to-area' model? What worked well, if anything? What was difficult, if anything?

10. What are the top three things that car clubs could do or change to encourage you to use them more?

Debrief, then end.

APPENDIX B

PHASE 2 TOPIC GUIDE

Thank you again for your input last time. Here are the potential barriers we collated.

Barriers identified

Journey Stage	Barriers
Joining the service	Insufficient or unclear information about the service at registration Accessibility of the registration process Length and complexity of Terms and Conditions Challenges in personalising the vehicle
Booking a vehicle	Difficulty in checking vehicle availability Uncertainty regarding vehicle specifications Concerns about costs related to disability Concerns regarding change in vehicle specifications Effort to explain and repeat needs / tailoring service
'Getting to the vehicle' and 'leaving the vehicle at the final destination'	Distance required to walk to the vehicle Accessibility of the vehicle's location Ability to park at undesignated spaces in emergency without being penalised
Unlocking the vehicle and getting ready to drive/getting into the passenger seat	Concerns about availability and setup of adaptations Technical difficulties with unlocking vehicle Reliability of functions within the vehicle Assistance required with vehicle entry and exit Checking the vehicle for damage
Others	Hotline/emergency contact Checking the vehicle for damage Impact of poor experience on future use

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AGENDA

- Moving towards a pilot.
- Have been discussing ideas with operators.
- Going to focus in on some areas. We have a total of 7 barriers that we want to touch on today.
- Want to develop those ideas with you today.

Note: Please approach this session by imagining that you are interested in using a car club service and that there is one near you, even if that's not strictly the case!

SECTION 1

Barrier summary: Some car club operators already offer some additional support and services as part of their schemes, however it is not communicated effectively. For example this additional support includes:

- Help with choosing a suitable vehicle
- Volunteer driver schemes
- Allowances for service dogs

1. How might this support be better communicated to you by car clubs?
   a. Through which channels?
   b. At which point in your research / sign-up process?

2. Some operators give information about support on their website. [present example]
   a. To what extent is it useful to have a dedicated webpage with information about accessibility?
   b. What level of information might you expect to be on the website?

SECTION 2

Barrier summary: Disabled people generally face higher costs in day-to-day life. Car Club fees can be expensive (or at least be perceived that way relative to other modes of travel). This represents a barrier to use.

There are different ways help is provided for the cost of transport. For example, you can apply for a disabled person's bus pass or railcard if you have a condition that makes it hard to get around.

With this pass you will be able to travel for free by bus, or get 30 per cent off your train tickets.

3. Can a similar pass work for car clubs? How would that look like in practice?

4. How should car club operators approach/ design discounts?

5. Are there other services which offer discounts that you think work well?

6. What's the minimum discount you would expect? [frame in terms of percentage]? [poll?]

SECTION 3

Barrier summary: Flexibility is important and there is uncertainty about cancellation fees which may apply if a car club booking has to be altered last-minute. This was raised as a particularly important barrier for disabled people.

These are the current cancellation fees/policies of some of the providers.

7. What do you think about these? To what extent would these suit your needs?

Uncertainty of costs and cancellation fees

Barrier: Flexibility is important and there is uncertainty about cancellation fees which may apply if a car club booking has to be altered last-minute. This was raised as a particularly important barrier for disabled people.

Car Club Provider	Cancellation Window
Operator 1	Cancel at least 5 hours before reservation. If cancelled with less than 5 hours' notice, liable for cost up to £30.
Operator 2	Cancel/change 3 hours before reservation. If cancelled less than 3 hours before, liable for entire amount of reservation.
Operator 3	Cancel at least 24 hours before pick-up. If cancelled less than cancellation window, liable for 50% of booking.
Operator 4	Cancel at least 2 hours before reservation. If cancelled less than cancellation window, liable for entire amount of reservation.

PHASE 2 TOPIC GUIDE

8. To what extent would these discourage you from using the service?

9. How could they be improved?

10. At what stage in the process would you want to know about these?

11. How do you think the cancellation policies should be best communicated to you?

SECTION 4

Barrier summary: Most CC services rely on digital systems for booking and communication, for example some require a facial identity check, require users to book via app or require users to use their phone to unlock vehicles. These systems may not be accessible and may put some users off.

One thing that CC operators can do is to make their webpages and apps compliant with accessibility standards.

But digital systems may be more challenging to use for some people than others.

12. What could Car Clubs do to support people to use digital systems?

I'd now like us to talk about other communication options for booking car clubs.

13. To what extent should other communication options be available? What types of communication options would be useful to you?

One idea would be to have someone who could talk a user through the registration, first booking and car collection.

14. How useful would this be for each of you? Why/ why not?

15. How could you imagine this working in practice?

  a. Explore: one-to-one via phone, F2F, online group familiarisation sessions

Imagine that car club operators couldn't do all of these. What should they focus on? What is the minimum you would expect?

16. Here is what some car clubs currently offer.

17. What do you think of these? What's good and what could be improved?

18. Imagine that car club operators couldn't do all of these. What should they focus on? What is the minimum you would expect?

5-10 minutes break depending on time

SECTION 5

Barrier summary: Car club operators aren't always aware that users have a disability, and so services aren't always tailored appropriately.

Knowing that a customer has a disability might enable car club operators to tailor a service better to individual needs. This could include things like tailoring communication options and, if the customer breaks down when using the car, flagging to breakdown services that the customer has a disability.

19. How would you feel about informing a car club service that you have a disability or particular access requirements?

20. What type of information would you be comfortable sharing?

  a. Prompt: That you have a disability (yes/no); how this impacts your ability to do certain things; what type of support/ adjustments you might need

21. How would you feel comfortable communicating this information? That is, via what channel?

22. Would you be comfortable communicating this during sign-up?

23. Is there anything else that should be considered if a car club operator were to implement something like this?

SECTION 6

Barrier summary: Some disabled users may face barriers getting to the vehicle. Background information: Spaces for vehicles are allocated to car clubs by the local authority which means that sometimes car clubs don't have control over where the vehicles are stationed – but they may be able to influence the local authority allocation procedure in future.

24. What is the maximum distance that you would be able or willing to walk/wheel to get to a vehicle (in metres or time to get there)? We realise that this would be different for different people. [poll/ private response]

For those using the volunteer driver scheme (discussed earlier, recap definition), the additional driver could collect the car and bring it to the door.

25. What do you think about this idea? How useful would this be?

Another option would be for car clubs to partner with a local charity. A volunteer from the local charity could act as the volunteer driver and bring the car to the door.

26. What do you think about this idea? How useful would this be?

SECTION 7

Barrier summary: Disabled people may not perceive CC services as inclusive or suitable for their needs.

Imagine if the above solutions are implemented to meet your needs.

27. What would make you feel confident that they are inclusive?

28. What information do you look for in order to feel confident about using a service?

29. Where should car clubs advertise in order to reach you?

SECTION 8

Barrier summary: Some customers feel that customer service staff are not trained to effectively support disabled people.

30. What sort of issues tend to arise as a result of insufficient training?

31. What sort of training do you think it would be helpful for staff to have?

SECTION 9

Out of everything we've discussed today, which are the one/two ideas that you think would have the greatest positive impact on your experience with car clubs?

Does anyone have any final thoughts they wish to share?

Debrief, then end.

APPENDIX C

SURVEY QUESTIONS

Project title: Accessible Car Clubs

Project overview

The project is looking at the accessibility of car clubs, particularly, how can car clubs be made more inclusive for disabled people. Car clubs are pay-by-the-hour car hire services that provide access to cars without the commitment of ownership. Examples of car clubs in the UK that provide flexible short-term rental options for individuals include Zipcar, Hiyacar, Co-wheels and Enterprise Car Club. The project aims to identify and explore solutions for making car clubs more inclusive for disabled people through user-focussed and collaborative research.

This project is being delivered by CoMoUK and TRL and is funded by the Motability Foundation.

What will happen if I choose to take part?

We invite you to complete an online survey. The survey will ask questions about barriers to using car clubs for disabled people, and what could be changed to address these barriers and encourage greater use of car clubs by disabled people.

Your participation in the study will help to influence the design of more accessible car club options in future.

You do not need any prior knowledge of or experience with car clubs to take part in the study.

For a successful completion of the survey you will be incentivised with the points/e – currency corresponding to the survey length and the particular incentive scheme of the panel you have subscribed for.

You are free to stop the survey at any point without providing a reason by closing the survey. If you have started or completed the survey, and no longer consent to your responses being used as part of the study, please contact us to request that your response data are deleted.

What information will be sought from me?

- Information about your disability or health condition

- Your gender

- Your age bracket

- Your ethnicity

- Your ability to drive

- Your experience using car clubs in the past

- The type of area you live in (urban/rural)

- Your opinions on car clubs and ideas for improvements to make them more accessible for disabled people

Will my taking part in this be kept confidential?

TRL (formally known as the Transport Research Laboratory) is collecting this data. TRL will not be able to identify you from your answers to the questions. Your answers will be collated with responses from other participants and reported as summary data. You will not be individually identifiable in the report.

All personal data collected as part of this study will be stored securely. Further information regarding data privacy can be found here.

Ethical review of the study

This study has been reviewed and approved by TRL's ethics committee.

If you would like any further information before starting the survey, please email.

CONSENT

32. Please answer the following questions*

- I have read and understood the information above and have had the opportunity to ask questions by emailing

  Yes No

- I understand that my participation is voluntary and that I am free to withdraw at any time without giving a reason

  Yes No

- I am aware that I can request that my data are deleted by emailing

  Yes No

- I give my consent to participate in this survey

  Yes No

PARTICIPANT DETAILS

Disability

1. Do you have a physical or mental impairment that is considered a disability under the Equality Act?

   Yes No

2. How would you best describe your disability or impairment? Please select the category that most closely applies to you? Please tick all that apply.

- **Sensory:** For example, deaf, hard-of-hearing, blind, visually impaired, dual sensory/deafblind, use an assistance dog or white cane, use British Sign Language, use hearing aid(s).

- **Physical:** For example, limited dexterity, manual wheelchair user, electric wheelchair user, mobility scooter user, struggle walking or getting in and out of cars, energy-limiting condition/pain condition, speech or communication impairment, use an assistance dog.

- **Cognitive:** For example, learning difference, neurodivergent (autism, ADHD, dyslexia, dyspraxia), experience of mental ill health, experiences epilepsy/ seizures.

- Others (please specify):

Demographics

3. Which of the following applies to you?

- Male
- Female
- Non-binary
- Prefer not to say

Prefer to self-describe:

4. Which of the following age groups do you fall into?

- 17 years or under
- 18-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-64 years
- 65-74 years
- 75 years or older

5. How would you describe your ethnicity?

- White (includes English, Welsh, Scottish, Northern Irish, British, Irish, Gypsy, Irish Traveller, any other white background)
- Asian / Asian British (includes Indian, Pakistani, Bangladeshi, Chinese, other Asian)
- Black / African / Caribbean / Black British
- Any other ethnic group (includes Arab and any other ethnic group)
- Prefer not to say

6. Which type of area do you live in?

By a rural area, we mean villages or areas of open countryside that have resident populations below 10,000 people.

By urban and sub-urban areas, we mean built-up areas such as towns and cities that have resident populations above 10,000 people.

- Rural area
- Sub-urban / Urban area
- I don't know

Use of car club service

Car clubs are pay-by-the-hour car hire services that provide access to cars without the commitment of ownership, for example, Zipcar, HiyaCar and Co-Wheels. They are self-service. Typically, a car club car would be parked in a parking space on a street in your local area. You would pick it up from there.

7. To what extent have you used car clubs in the past? Please select the option that best reflects your past experience.

- I have not heard of car clubs and have not used them before.
- I have heard of car clubs but have not used them before.
- I have used a car club once or twice – but more than 2 years ago.
- I have used a car club once or twice within the last 2 years.
- I use car clubs sometimes.
- I use car clubs monthly.
- I use car clubs weekly or more.

Driving licence and vehicle ownership

8. Do you have personal use of a vehicle? (For example, your own car, or the car of a carer, family member or personal assistant.)

- Yes
- No
- Something else (please specify)

9. Do you currently hold a valid UK driving licence?

- Yes (a full licence for car)
- Yes (a provisional licence for car)
- No, I am disqualified due to a medical condition or disability [skip Q10]
- No, I do not hold a valid UK driving licence (for any other reason) [skip Q10]
- Something else (please specify).

10. How frequently do you drive? Please tick whichever option most closely matches how often you drive.

- More than once a week
- Once a week
- 2 or 3 times a month
- Once a month
- Less than once a month
- Never

11. How often do you rely on someone else (for example, a relative or carer) to drive you to your destination?

- More than once a week
- Once a week
- 2 or 3 times a month
- Once a month
- Less than once a month
- Never

QUESTIONS

Informing car club about access needs

1. How comfortable or uncomfortable would you feel about informing a car club service that you have a disability or medical condition?

Service providers may ask for this information for various reasons, such as to comply with legal requirements, offer tailored support, ensure health and safety, provide equal access, collect data for reporting, and determine eligibility for benefits, all while adhering to data protection regulations.

- Very comfortable
- Comfortable
- Neither comfortable nor uncomfortable
- Uncomfortable
- Very uncomfortable

2. How comfortable or uncomfortable would you feel about informing a car club service that you have a particular access requirement, if any?

- Very comfortable
- Comfortable
- Neither comfortable nor uncomfortable
- Uncomfortable
- Very uncomfortable
- Not applicable – I don't have any particular access needs

3. How would you feel most comfortable communicating information about your disability or access needs?

- A section on my account profile that I can fill out
- Email the operator
- Speak to a staff member via telephone
- Filling in a textbox during sign-up
- Other (please specify)

4. The most common way of storing information about users' disability or access requirements is by recording details on the users' online profiles. What length of time would you want the car club operator to store information about your disability/access needs for?

- Just one trip
- Indefinitely
- Indefinitely, with the option to edit this
- For a certain period of time. Please specify:

[   ]

Information and communication

Some car club operators offer additional support and services as part of their schemes, such as different types of vehicles, allocating a surrogate driver to drive on your behalf, and allowing support dogs on-board the vehicle. In focus groups conducted earlier in this study, disabled people told us that they felt information about additional support and services is not clearly communicated to them, which can discourage them from using car clubs.

5. What would be your preferred approach for communication of what support is available from a car club operator? *(Please select only one)*

- A dedicated webpage with a list of all the support available
- Discussion with a trained staff member who can talk through my needs once I indicate that I have a disability
- A video on the car club's website that explains the different available support options
- When I am making a booking, options to use support services presented as 'add-ons' on the webpage / app
- A walk-in centre where a trained staff member can guide me
- Others (please describe):

[   ]

6. What type of information is most important for you to know before registering for a car club membership? Please select the top three most important from the list below.

- Information about the price of using additional support and services.

- Information about the availability and setup of any necessary driving adaptations.
- Information about what to do in an emergency.
- Information about how to book, unlock, and leave a vehicle at the end of the booking.
- Information about the specifications of the vehicles available to understand if it meets my needs.
- Information about the cancellation policy applicable to me as a disabled person.
- Information about discounts applicable to me as a disabled person.
- None of the above.
- Something else (please specify):

[   ]

Accessibility of the Registration and Booking Process

From focus groups conducted earlier in this study, we found that disabled people expected that the registration process for car clubs would be inaccessible. This can therefore present a barrier to use.

7. Which of the following would be the most useful method for the car club operator to provide assistance with completing the registration process and making your first booking? *(Please select only one)*

- Written information on webpage
- Written information on mobile app
- Guided by an operator via a telephone call
- Guided by an operator via a live chat online
- How-to videos online that tell me what to do step-by-step

- A walk-in centre where a trained staff member can guide me
- Others (please specify)

[   ]

8. Which of the following would be the most useful method for the car club operator to provide assistance in general? (Please select only one)

- Written information on webpage
- Written information on mobile app
- Guided by an operator via a telephone call
- Guided by an operator via a live chat online
- How-to videos online that tell me what to do step-by-step
- A walk-in centre where a trained staff member can guide me
- Others (please specify)

[   ]

9. If the methods you selected above were introduced or improved, what impact would that have on your likelihood to use car clubs?

- I would be much more likely to use car clubs.
- I would be somewhat more likely to use car clubs.
- I would be neither more or less likely to use car clubs.
- I would be somewhat less likely to use car clubs.
- I would be much less likely to use car clubs.

Cost related barriers

The cost of car clubs could be a barrier to use for some people. It is perceived to be more expensive than other transport options.

10. As a disabled person or someone with accessibility needs, would you expect to receive a discount for your use of a car club service?

- Yes, I would expect some discount.
- No, but I would expect flexibility in other ways. [skip Q11]
- No, I do not expect any discount. [skip Q11]
- Unsure. [skip Q11]

11. What is the minimum level of discount that you would expect to support your use of a car club service? *Please provide your response in a percentage.*

[   ] %

12. How would you expect the car club to determine eligibility for a discount?

- I would want to be able to show my existing travel pass (for example, disabled person's bus pass/railcard) to claim the disabled person's discount with car clubs
- I would want to be able to use my blue badge card to claim the disabled person's discount with car clubs
- I would want to be able to show that I receive disability benefits to claim the disabled person's discount with car clubs
- I would want the car club to trust my declaration
- Others (please describe)

[   ]

13. If an appropriate discount was offered for disabled users in future, what impact would that have on your likelihood to use car clubs?

- I would be much more likely to use car clubs.
- I would be somewhat more likely to use car clubs.
- I would be neither more or less likely to use car clubs.
- I would be somewhat less likely to use car clubs.
- I would be much less likely to use car clubs.

Cancellation policies

In focus groups conducted earlier in this study, we found that disabled people need flexibility to make changes to their booking, as their mobility might be affected last-minute due to their health condition or disability.

14. To what extent do you agree or disagree that there should be a different cancellation policy for a car club user who has indicated that they have a disability or particular access need on their profile?

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

15. How important or unimportant is it for you to be able to cancel or amend a booking of a car club vehicle without incurring a charge?

- Very important
- Somewhat important
- Neither important nor unimportant
- Not so important
- Not at all important

Current car club cancellation policies vary between operators, with some offering more flexible terms than others. For example, one operator allows free cancellations up to 5 hours before the reservation, and charges a capped fee of £30 for late cancellations outside this time. Other operators provide free cancellation 2-3 hours in advance, and offer no refunds for any cancellations outside of this time. Another operator offers free cancellation up to 24 hours before the pick-up time, with a 50 per cent charge for later cancellations.

16. Please tell us what you would consider acceptable in terms of a cancellation policy:

- Free cancellation up to_____hours before the time of the booking.
- For late cancellations outside of this time, a charge of _____.

17. If the cancellation policy was more flexible for disabled users, what impact would that have on your likelihood to use car clubs?

- I would be much more likely to use car clubs
- I would be somewhat more likely to use car clubs
- I would be neither more or less likely to use car clubs
- I would be somewhat less likely to use car clubs
- I would be much less likely to use car clubs

Adaptations

18. Do you use any adaptations or assistive devices for driving? [only those who drive, see Q10]

- Yes (please describe the adaptation or assistive devices you use):

[   ]

- No [skip Q20 and 21]
- I'm not sure

19. Imagine you had booked a car club vehicle in future. If you had informed the car club operator that you require adaptations or assistive devices for driving, how would you prefer these to be provided when using a car club?

- I would expect the operator to provide the adaptations I need and install them in the vehicle
- I would expect the operator to provide the adaptations I need. I am happy to install them in the vehicle myself
- I would prefer to use my own adaptations and install them in the vehicle
- I would expect the operator to provide some adaptations, but I may also use my own
- I'm not sure how I would want adaptations to be provided

20. If suitable adaptations or assistive devices were provided by car club operators in future, what impact would that have on your likelihood to use car clubs?

- I would be much more likely to use car clubs
- I would be somewhat more likely to use car clubs.
- I would be neither more or less likely to use car clubs.
- I would be somewhat less likely to use car clubs.
- I would be much less likely to use car clubs.
- Not applicable – I do not need an adaptation

Distance to vehicle

To use car clubs, a user typically needs to pick up the vehicle from the designated pick-up point where the vehicle is parked. Some disabled users may face barriers getting to the vehicle.

21. On an average day, what is the maximum distance that you would be able or willing to walk or wheel to get to a car club vehicle? Please provide a response in metres, if you are not sure – please give you best estimate. (For reference, 1 mile is approximately 1,600 metres).

[   ] metres

Volunteer driver

Some car club operators already offer some additional support and services as part of their schemes such as a surrogate driver.

You can nominate someone as a surrogate driver as long as they have a valid driving licence. You can become a (non-driver) member with up to 3 appointed people as the driver on your account. They will be able to book vehicles on your behalf and any bookings they make will be payable through your account.

22. How useful would this be for you?

- Extremely useful
- Very useful
- Somewhat useful
- Not so useful
- Not at all useful

Another option would be for car clubs to partner with a local charity. A volunteer from the local charity could act as the volunteer driver and bring the car to the door.

23. How useful would this be for you?

- Extremely useful
- Very useful
- Somewhat useful
- Not so useful
- Not at all useful

24. If a volunteer driver brought the car to your door, would you prefer to:

- Drive the car yourself from that point
- Have the volunteer drive for the entire trip
- Have the volunteer drive for part of the trip (for example, one-way of the journey)

25. If a volunteer driver option was provided, what impact would that have on your likelihood to use car clubs?

- I would be much more likely to use car clubs.
- I would be somewhat more likely to use car clubs.
- I would be neither more or less likely to use car clubs.
- I would be somewhat less likely to use car clubs.
- I would be much less likely to use car clubs.

Advertising/awareness

26. Where should car clubs advertise in order to reach you?

- With disabled charities and organisations
- With local councils
- Clinics, hospitals, local health centres
- Billboards
- TV
- Radio
- Social media (for example, Facebook)
- Via online disability support groups (for example, wheelchair travel group)
- Others (please specify)

[   ]

Importance of barriers

27. Below is a list of barriers to using car clubs for disabled people from initial engagement with disabled people via focus groups conducted earlier in this study. What would be the most important things to get right for you and your needs in order to encourage your use of car clubs in future? (Tick all that apply)

- Having a dedicated contact number for assistance with access-related issues.
- Being able to personalise the vehicle/check vehicle's specifications before booking.
- Being able to check the availability of different types of vehicles before booking.
- Having flexibility in cancellation policies for disabled people/people with access needs.
- Not needing to repeatedly explain personal needs or request service tailoring.
- The distance required to walk/wheel to the car club for pick-up or drop-off is not too far.
- The vehicle's parking location is accessible.
- Having assistance to enter or exit the vehicle.
- Having driving adaptations provided as requested
- A surrogate driver scheme (where I can nominate people I know who can drive me).
- A volunteer driver scheme (where a volunteer can drive me for part or all of the journey).
- None of the above.
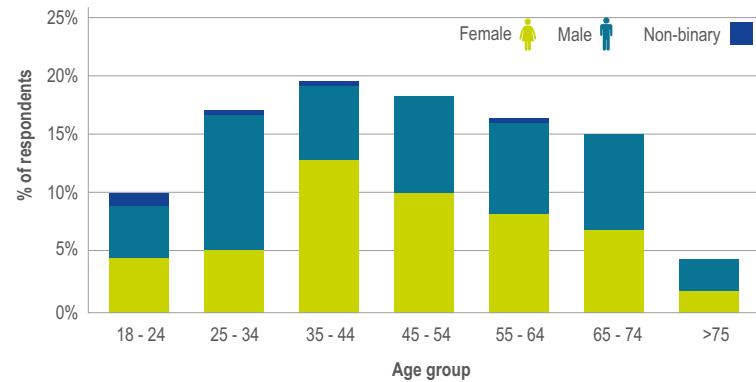- Something else (please specify):

28. Are there any other things that are essential to get right for you and your needs that you would like to share? [Open text response]
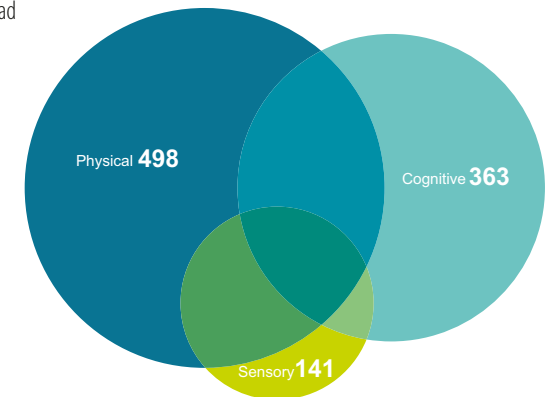
SURVEY RESPONDENT DETAILS
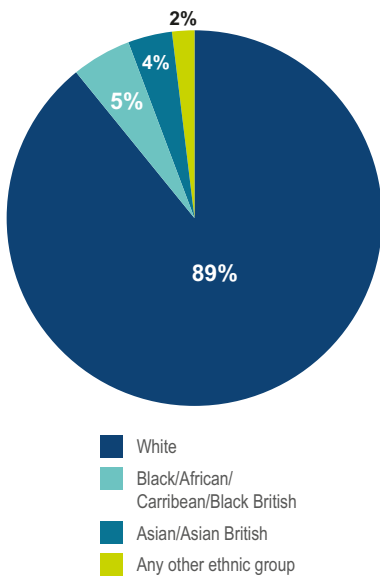
Below are demographic details of the survey respondents.

Figure 17: Distribution of participant age and gender

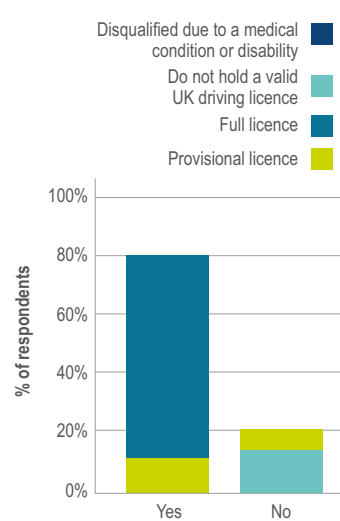**Figure 18:** Venn diagram of types of impairment participants stated they had
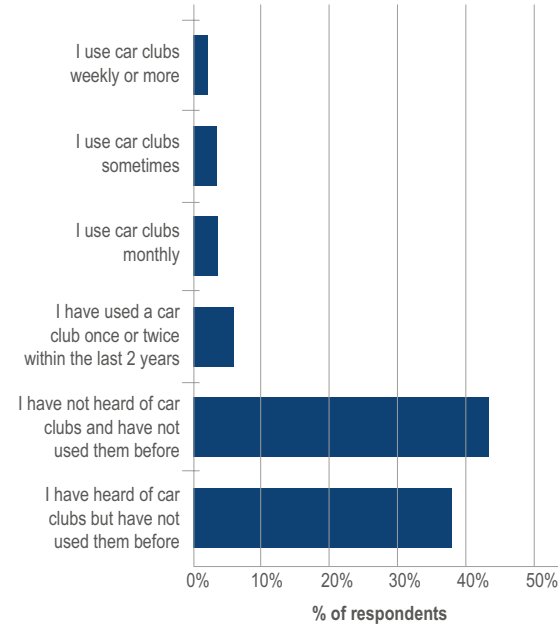

Physical **498**

Cognitive **363**

Sensory **141**

Figure 19: Distribution of participant ethnicity

- White
- Black/African/Carribean/Black British
- Asian/Asian British
- Any other ethnic group

Figure 20: Number of participants who have a valid UK driver's licence

- Disqualified due to a medical condition or disability
- Do not hold a valid UK driving licence
- Full licence
- Provisional licence

Figure 21: Participant's awareness of car clubs

Figure 22: Participant's frequency of use of car clubs, grouped by disability type

- Cognitive
- Physical
- Sensory

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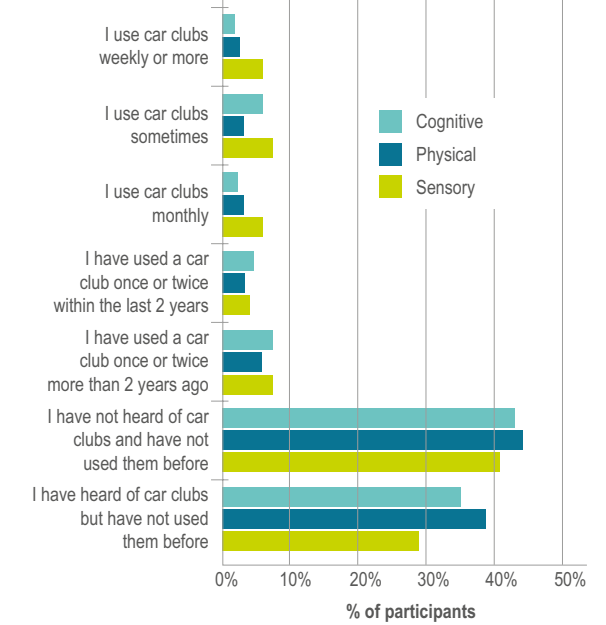
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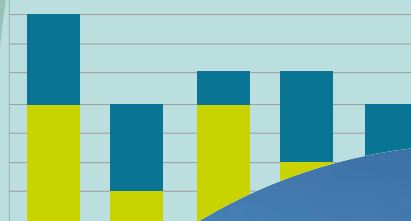F: +44 (0) 1344 770356
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