

FRENCH NATIONAL SURVEY ON CARSHARING - EDITION 2016 -

Table ronde : La recherche aussi façonne l'autopartage //
Round table : Data is our friend - Research tells the carsharing story



**CSA ANNUAL
CONFERENCE 2017**
MONTREAL MAY 18 & 19

6t-bureau de recherche

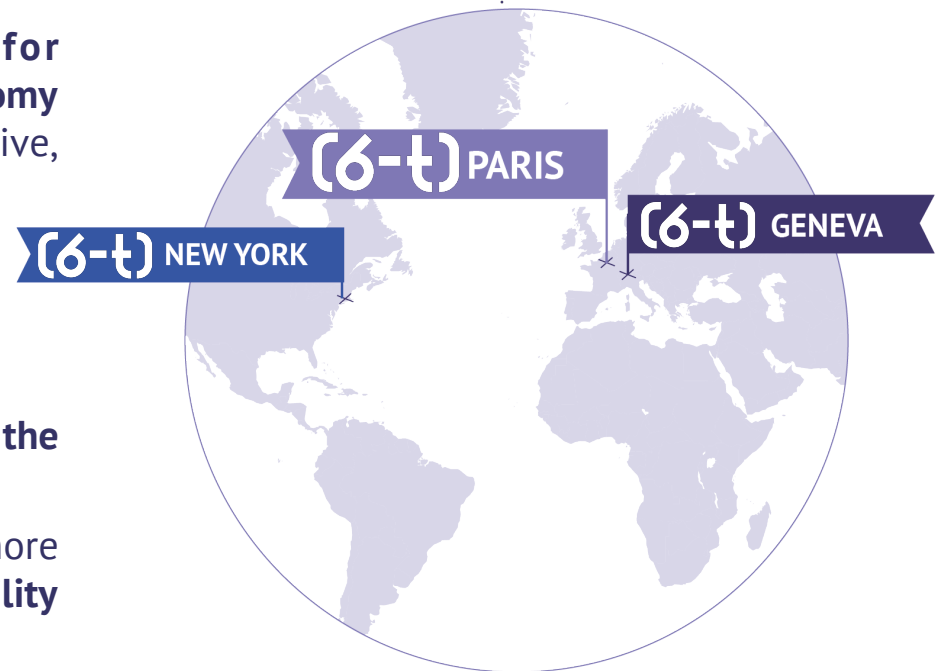
A MOBILITY RESEARCH FIRM

- We gather the expertise of **multidisciplinary individuals** to understand complex **mobility issues** and **mobility behaviors**
- We use several **different methods for understanding sociology, geography, economy and urban planning**, and carrying out qualitative, quantitative and cartographic analyses.

AN INDEPENDENT FIRM

- 6t's consultants have **experience in both the public and private sector** and in research.
- **6t also funds its own research projects** for more objective and precise data **on new mobility solutions**

A MOBILITY RESEARCH FIRM...



... WITH EXPERIENCE
IN BOTH **PUBLIC AND
PRIVATE SECTORS**

Context

A UNIQUE STUDY

- **4 years after the first edition** of the French National Survey on Carsharing, **does carsharing still play the same role in urban mobility?**
- Similar to the 2012 edition, the 2016 edition focuses primarily on **round-trip carsharing**

TWO KEY OBJECTIVES

- **Update the results** of the first edition (2012)
- **Better understand the users, uses and impacts of carsharing in France**

THE FIRST LONGITUDINAL
STUDY ON CARSHARING
USES AND USERS



THE STUDY WAS CONDUCTED
WITH **6T OWN FUNDS** AND THE
FINANCIAL SUPPORT OF ADEME

Methodology

5 SURVEYS TO UNDERSTAND THE VARIOUS ASPECTS OF CARSHARING

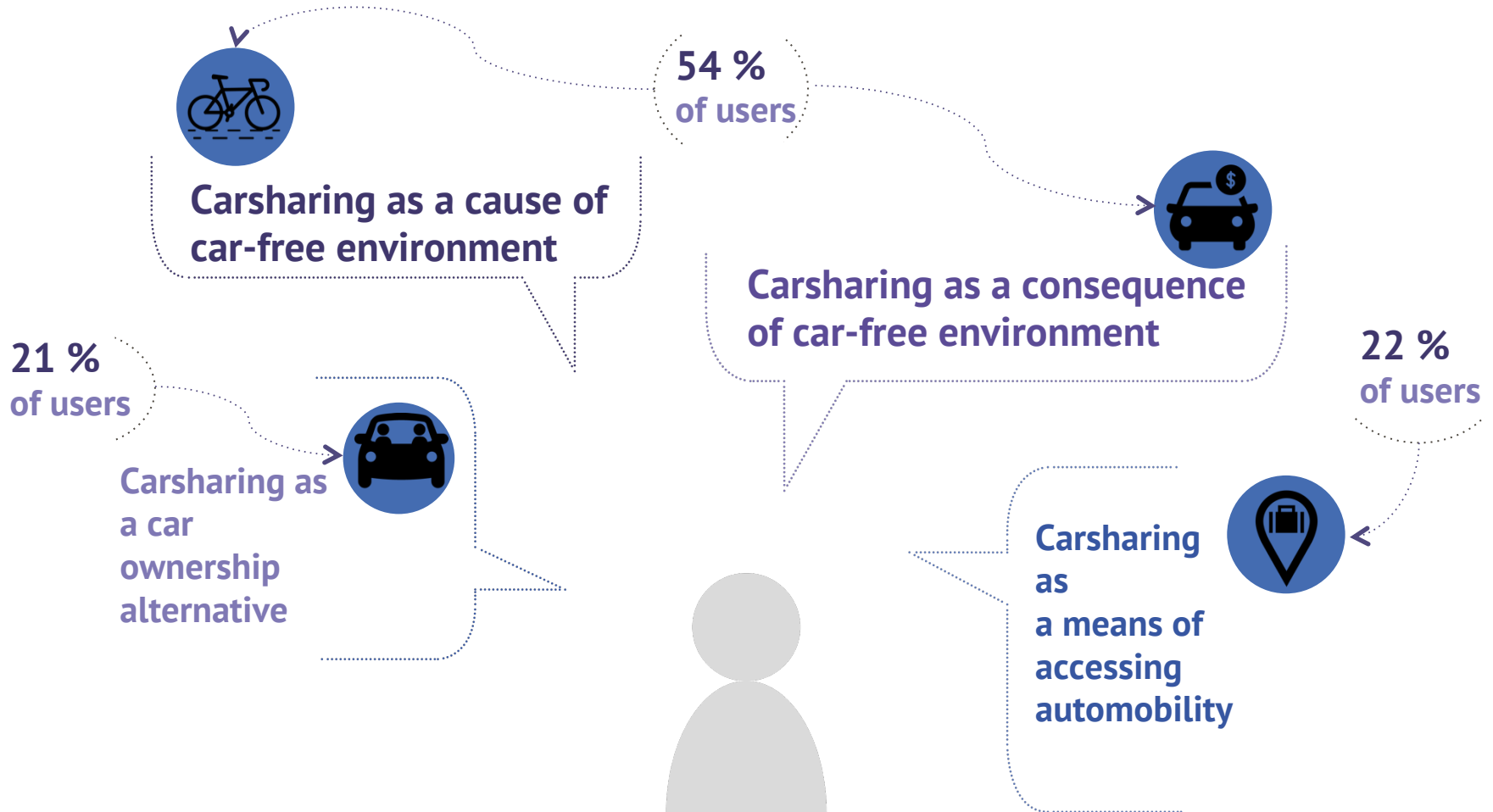
- **A large survey of 2 061 round trip carsharing users;**
- **A follow-up survey of 276 persons** who had already responded to the 2012 survey;
- **A survey of 158 vehicle fleet managers** working within companies, local authorities or associations;
- **A survey of 83 users** of the P2P carsharing service, **Koolicar**.
- **A qualitative survey with 25 carsharing users and former users.**

These surveys were distributed by the following carsharing operators:



Carsharing: a diversity of paths ...

HOW DOES ONE BECOME A CARSHARING USER?



Carsharing: a diversity of paths ...

THREE MAJOR PATHS IN BEHAVIORAL EVOLUTION

Profil 1 : Little change in behaviors



> no significant change in the traveling practices

81 %

of carsharing users

Profil 2 : Bicycle fans

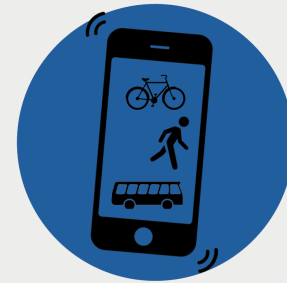


> Increase in the use of bicycles
> Decrease in the use of personal cars and sharp drop in the use of public transportation

10 %

of carsharing users

Profil 3 : ex-motorists who have become multimodal users



> Increase in the use of public transportation, walking and cycling
> Sharp drop in the use of cars

9 %

of carsharing users

...but a socio-economic profile that is still very consistent

PORTRAIT OF ROUND-TRIP CARSHARING

Profile of carsharing users in 2016

73 % of holders of a bachelor's degree or higher (71 % in 2012)

54 % men (53% in 2012)



45 years old average age (42 years old in 2012)

57 % executives and higher intellectual professions

3 691 € monthly net income of the household of a carsharing user on average (3375 € in 2012)

Carsharing rentals in 2016



13 hours / 4 hours average and median duration of rentals



78 km / 35 km average and median distance traveled during a rental



56 € / 30 € average and median cost of a rental

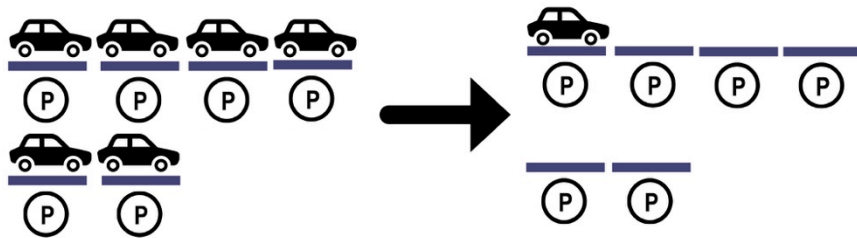


2,2 Average number of rentals per user and per month

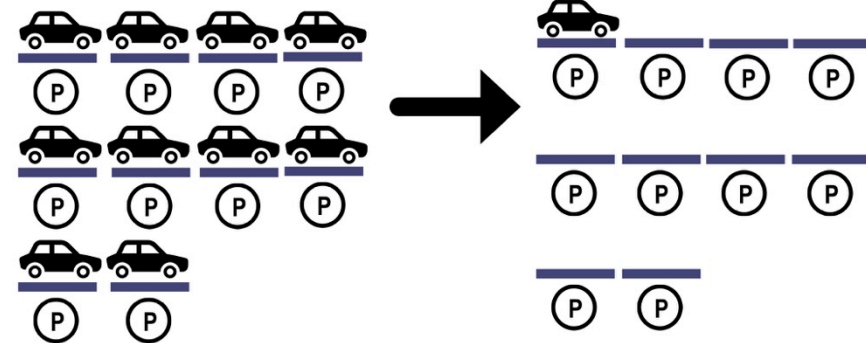
A decrease of the automotive equipment

CARSHARING ENVIRONMENTAL RELEVANCE REMAINS CONSIDERABLE

IN 2012, ONE CARSHARING VEHICLE REPLACED 6 PERSONAL CARS



IN 2016, EACH CARSHARING VEHICLE REPLACED 10 PERSONAL CARS AND FREED 9 PARKING SPACES.



Key insights of the follow-up survey

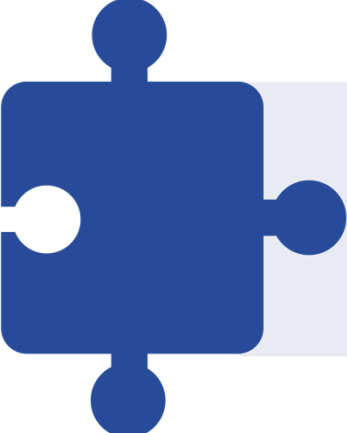

THE CHALLENGE OF SUSTAINING THE PRACTICES OF CARSHARING OVER TIME

The longitudinal survey consists of a follow-up of **276 persons who had already responded to the 2012 survey.**



In 2016, respondents **use carsharing less frequently than in 2012.** 16% never use it in 2016, while only 2% never used it 2012.

People who no longer use carsharing in 2016 **use personal cars and PT** primarily to make their former carsharing trips.



Respondents who no longer use carsharing have returned to **the same level of automotive equipment** as they did before carsharing.

The success factors for a carsharing system

1

Set up stations where there are many car alternatives options

Carsharing users are people who do not need to use their car daily: **Only 5% use it every day.**

2

Create a dense network of stations

63% of users declared that they favored the proximity of the station rather than the choice of the car model.

3

Offer different kinds of vehicles

Users like to be able to occasionally use a electric vehicle, a van, a family vehicle or even a vehicle which is accessible to persons with reduced mobility.

4

Facilitate access to the service with

- A registration that can be done entirely online;
- Access to the vehicle via a transit pass or a smartphone;
- Several pricing, including one without a subscription.
- **High quality app**

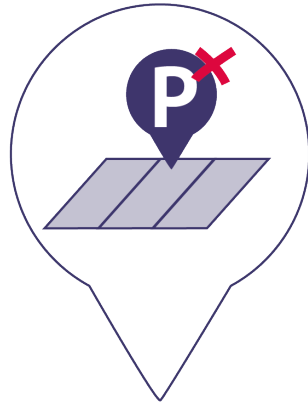
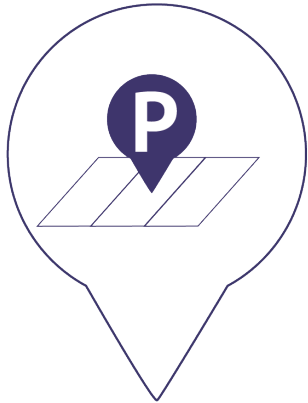
5

Promote carsharing with businesses and local authorities

People who use carsharing for professional trips need it during weekdays, while private individuals use it especially in the evenings and on weekends.



How local authorities can support carsharing ?



Provide parking spaces

- **30%** of current users discovered carsharing by passing in front of a station

Implement parking restriction policies

- **43%** of users declared that car parking constraints played a role in their decision to subscribe to carsharing

Develop an institutional communication

- Operators want communication that starts with the local authorities and community's active support.

Give financial support

- **to accompany them towards cost-effectiveness** in the 1st phase of their development;
- **to promote the use of carsharing** by their agents for both professional and personal journeys

THANK YOU

6T – BUREAU DE RECHERCHE, 2017

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