

How does Autolib' users' mobility behavior evolve overtime?



(6-t) User Panel - Autolib' users -

Results of the follow-up survey to 6t's study on one-way carsharing (case study of Autolib' Paris) / December 2014

With 69 010 active subscribers, 2 832 cars and 875 stations¹ in Paris-region, Autolib' has provided carsharing with considerable media exposure in France, in spite of being operational since only 3 years.

One year after conducting the first independent survey on one-way carsharing², 6t has undertaken a follow-up survey with the same respondents in order to analyze the evolution of Autolib' users' mobility behavior over the past year.

>> Why set up a user panel?

It can take some time for carsharing to induce its users to change their mobility behavior. Changes happen as users gain experience with their carsharing service.

The aim of 6t's user panel is to measure long-term behaviour evolution and to identify drivers of change by following the same users over time.



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In the past years, have Autolib' users ...

- ... changed the way they use Autolib'?
- ... changed the way they use other alternatives to the personal car?
- ... used the private car more or less?
- ... changed their mind about Autolib's strenghts and weaknesses?



USER PANEL'S MAIN FIGURES

Beyond setting up a representative sample of users (which was already done in the 2013 survey²), the purpose of this user panel is to analyze individual trajectories.

- 1 online survey conducted in november 2014
- 289 survey respondents (representative of the 2013 survey's 1196-respondent-sample in terms of age, gender and occupational categories)
- who had agreed to be surveyed again during the first survey in 2013
- 40 questions to measure changes in the use of the service and the interest for all transportation modes

Assessment of changes is made possible by comparison between the results obtained in the initial survey in 2013 and the follow-up survey in 2014.

1. Autolib' Métropole's data as of November 30th, 2014
2. 6t, 2014, *One-way Carsharing, an alternative to private cars use ?* <http://wp.me/p43mK2-l3>

Users have reduced their use of Autolib' in 2014...

Autolib' is a one-way carsharing service characterized by a high frequency of use. As of 2013, most subscribers used it more than once a week, while most round-trip carsharing users, such as Mobizen's users in Paris, use it less than twice a month. Since the end of 2013, **the share of subscribers using Autolib' more than once a week has shrunk from 73% to 62%.**

This decrease in the frequency of use is consistent with data released by Autolib' Métropole³, according to which the number of rentals per subscriber per week has diminished over Septemer 2013 - November 2014 period.

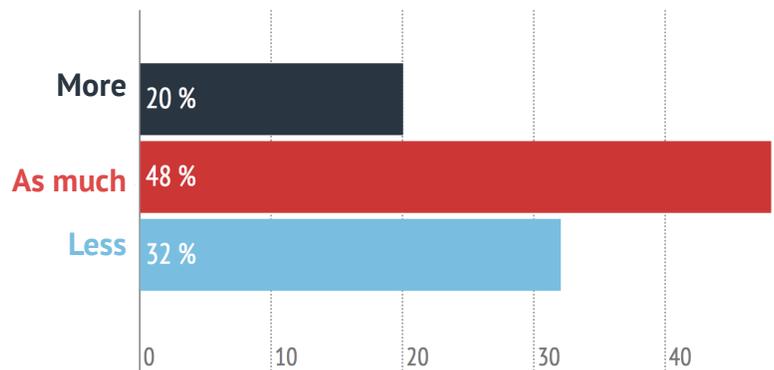
32 % of the users rent an Autolib' less often than in December 2013, while only 20% rent one more often. Members with a lower frequency of use are mainly users who used to rent an Autolib' at least once a week in 2013.

Over time, users seemingly lose the "Autolib' reflex" and make a more moderate use of it.



Photo credit: 6t-bureau de recherche

Evolution of Autolib' frequency of use between 2013 and 2014

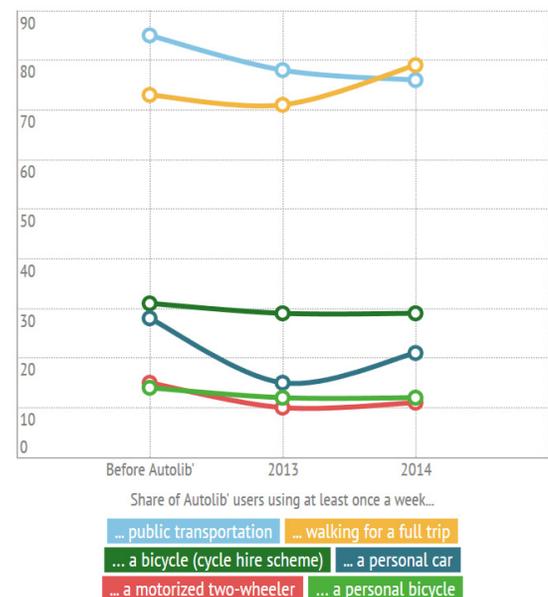


... in favour of other individual transportation modes

Our 2013 survey has shown that subscription to Autolib' led users to decrease their use of all others transportation modes in favour of Autolib' carsharing service. Even so, between 2013 and 2014, **the frequency of use of other transportation modes has stopped its decrease.**

It has either remained stable, which is the case for public transportation and cycling, or increased, which is particularly true of walking (79% of users walk for a full trip at least once a week vs. 71% in 2013), and is also true of personal car use (21% of respondents use it at least once a week vs. 15% in 2013).

Evolution (in %) of the share of Autolib' users using at least once a week the following transportation modes:



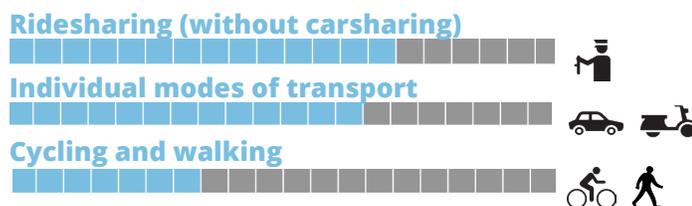
Autolib' pushes its users towards individual transport modes

While their use of public transportation is stable, **Autolib' subscribers use private motorized vehicles** (personal cars and motorized two-wheelers) **more than one year ago.**

Among the 35% of users whose use of these vehicles have changed last year, 69% have used them more.

Among the 64% of users who have changed their use of cycling and walking for full trips, 57% have used them more since 2013 (which is yet mainly due to

Evolution in the frequency of use of other forms of transportation



increased walking).

Among the 71% of users who have changed their use of transportation modes based on shared cars (taxi, car rental other than carsharing and carpooling), 60% have used them more.

Autolib' users' taste for shared cars is confirmed by the high share of those who have already use ridesharing through companies such as Uber, Lyft, etc. (46%) and of those who use it at least once a month (24%).

Private cars host more shared rides than Autolib' vehicles

Autolib' users take less passengers in average when using an Autolib' car than when using their own car. According to respondents' answers, the average number of passengers in Autolib' cars (driver included) is 1.8. It is below the average number of passengers in Autolib' users' private cars, which is 2.2.

Autolib' leads to a decrease in kilometres driven with a car...

Our 2013 survey showed that the amount of kilometres driven by users with a (private or shared) car had decreased by 11% after their subscription to Autolib' carsharing system.

Between 2013 and 2014, the amount of kilometres driven by users had reduced by 18%. However, over the same period, the amount of kilometres travelled each month by Autolib' members with their own car has increased by 9%.

Between 2013 and 2014, the decrease of kilometres travelled with Autolib' was offset by increased amount of kilometres driven with users' private cars. It is Autolib' users that still own a car that block the overall decrease of kilometres driven with a private car.



... but to a more frequent car use for daily trips

For this follow-up survey, we asked Autolib' members whether they have changed their frequency of car use (understood as private car, carsharing, car rental, taxi,...) for different types of trips.

For occasional trips (weekend, holidays), **the change in car use behaviour remains marginal** : nothing has changed for 63% of Autolib' users. Moreover, they are almost as many to use it "more" or "less" (respectively 20% and 17%).

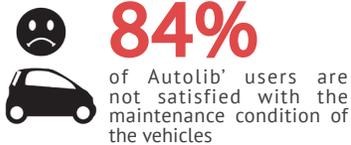
However, for daily trips both inside Paris and in Paris region, the changes in car use behavior are important. 69% of Autolib' users have changed their mobility uses. 46% of them report that they use cars more compared with 23% of respondents who declare that they use cars less.

46%
of respondents declare they use cars more for they daily trips

Autolib': a good quality of services undermined by the maintenance condition of the vehicles

While most of Autolib' users are satisfied with the quality of Autolib' services (telephone helpline, customer service, reservation system, etc.), the rate of cleanliness and maintenance appears to be very low.

Back in 2013, 66% of our survey respondents were not satisfied with it. In 2014, 84% of respondents complain about it.



The number of cars owned by Autolib' users has not changed between 2013 and 2014

Our 2013 survey has shown that the majority of Autolib' members who still own a car after the switch to carsharing consider that carsharing would not lead them to give up their car even later. Indeed, according to our users panel, the overall car ownership has not changed.

In order to affect car ownership, others levers than carsharing offer should be used, including the constraints to the use of private car.

Overtime, Autolib' users:

- maintain a less frequent use of private car;
- rediscover alternative means of transportation to the car that they had largely given up after signing up to Autolib'.

Nevertheless, Autolib' carsharing service seems to restore the desire to use private car for users who still had one. Indeed, they report a higher frequency of car

use than before signing up for Autolib' (68% use it "at least one day per week" compared with 57% before being registered).

Thus, Autolib' is not sufficient by itself to change mobility behavior. **Along with an alternative to car ownership, the development of a more restrictive policy regarding car use is necessary.** This binding policy must be assumed and carried out by public authorities.

Glossary of carsharing systems

Carsharing :

A self-service car rental system, most of the time located in urban environments, that allows people to use of a vehicle with or without prior reservation in an occasional way.



Round-trip or « classic » system

The vehicle is returned to the starting station. It is possible to reserve several hours in advance and the rental time must be specified.



One-way system

The vehicle does not have to be returned to the starting station. It is not possible to reserve it several hours in advance and the rental time does not have to be specified.



Peer-to-peer (P2P) system

The transaction is made between private individuals. Operators responsible for billing and insurance carry out the system, and also charge a commission for each transaction. The vehicle must be generally reserved at least 24 hours in advance and the duration must be specified.

Autolib' is not the only carsharing service in France. It is a one-way carsharing service with a high density of offer that reaches far more users than any other carsharing service in France. However, it has been analyzed that at the individual scale, round-trip systems (Zipcar, Citiz or Mobizen) have a greater impact on users' ecomobile behaviour. **Therefore, it is worthwhile to continue the development of all carsharing systems and to make them as visible as Autolib'.**

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Full report is for sale at www.6t.fr

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This study was conducted by 6t-bureau de recherche, a research-oriented consulting firm specialized in transportation and mobility issues.