Emerging mobility solutions and their impact on practices

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Understanding emerging mobility services

- WHO USES THEM?
- HOW?
- HOW DO THEY IMPACT TRADITIONAL MODES?
- HOW DO THEY FIT WITHIN THE ECOSYSTEM OF ALTERNATIVE TRANSPORT OFFERS?

The case of France: user surveys conducted by 6t between 2015 and 2019
Dockless bikes (2018 user survey, Paris)

**Use patterns**

| + Occasional uses | 63% 1-3 times in total, 31% 1-3 times per week, 6% almost everyday |
| + Mostly leisure | only 17% of home-work trips (38% of regular bike trips) |
| + Intermodal practices | 27% of intermodal trips (9% of regular bike trips) |
| + 5.25 km per trip | on average |
| + 4.8 trips | per month/user |

**Users profiles**

| + Young users | (59% below 35; 38% of the Parisian population), mostly men (68%) working as executives and in higher intellectual professions (68%) |
| + Not former bikeshare users | 52% had never used Vélib’, 2/3 had never used a bike |

**Impacts**

| + Change in public transport use: 45%. 9% decrease in frequency, 34% marginal impact. |
| + Walking | 32% changed. 6% decrease, 22% marginal impact |
| + Vélib’ | 28% changed. 17% decrease, 9% marginal impact |
| + No impact | on car equipment |
| + Without the service, 42% would have used public transport, 25% walked, 1% only would not have been able to travel. |

An occasional practice with a non-inclusive user base, but a service that allows for experimentation
Dockless scooters (2019 user survey, Paris)

Use patterns

+ Mostly used for leisurly trips (strolls or going out),
+ 23% of trips are intermodal
+ On average, 4.7 kms per trip. 59% of trips between 1 and 4 kms. 11% of trips above 10 kms (long strolls)
+ 4.10 trips per month per user

Regular users (at least 1/week)
Occasional users (1-3/month)
Single users (only once)

38% of collective trips

26% each on a different scooter
10% on the same scooter
Dockless scooters (2019 user survey, Paris, Lyon, Marseille)

Users profiles

- 58% local users, 9% foreign tourists, 33% French tourists
- Young (36 on average), men (66%), executives and higher intellectual professions (53%)

Impacts

- Without shared e-scooters, 44% of local users would have walked, 33% would have used public transport.
- Only 3% would not have been able to travel.
- 12% say that shared e-scooters changed their use of the private car; only 4% would have used a car without an e-scooter.
- Shared e-scooters would represent a modal share of 0,8% to 1,9% in Paris, after only 1 year in service.

Shared e-scooters: a bit of fun makes public transport more acceptable? A new demand for cycling infrastructure?
Use patterns

- 22% of trips are home-work trips (highest among the services considered)
- Without Cityscoot, 48% would have used public transport. Only 0.5% would not have been able to take that trip.
- On average, 5.4 km per trip.
- 6.5 trips per month per user: intensive use. 51% of users use Cityscoot at least once a week.
- 20% intermodal trips (63% linked with public transport)

Users profiles

- 9 users out of 10 are men
- Young users: only 24% are above 45 (45% of Parisians)
- 55% in higher professional and intellectual professions (29% in Paris)

Impacts

- 4% of users let go of a private motorscooters
- 13 private motorscooters (mostly combustion engines) are replaced by 10 e-motorscooters.
- Other modes impacted: public transport (53%), ridehailing (36%) and walking (21%)
- 14% say that they changed their use of the private car since they started using the service; only 3% would have used a private car without Cityscoot.

A specific client-based displaying an intensive use that remains stable overtime. A fast and pleasant alternative to public transport.
Carsharing (User survey, France, 2016)

Use patterns
- 2,15 rentals per month per user
- Mostly used for shopping (29%), visiting friends or relatives (24%) leisure activities (23%)
- One-way carsharing is used more during the week and for work-related trips
- 1,87 passengers per trip: 1,88 for round-trip, 1,66 for one-way. (1,4 on average for private cars in France)
- Average distance: 38 kms for one-way (median: 19), 83 km for round-trip (median: 35).

Users profiles
- Moving away from the « early adopter » profile: older than other services (45 years old on average), 54% men, 63% executives
- 70% live in the central city of their metropolis → complementarity with other modes

Impacts
- Without carsharing, 1 in 3 users would not have been able to travel (22% one-way, 32% round-trip)
- 31% of households were carfree before-> 77% after starting to use carsharing
- 48% of abandoned cars due to carsharing
- Public transport use increases (+0.2 times/month/person)

Carsharing helps users go car-free and only works when other alternatives transport modes are available
Ridehailing (Uber user survey, 2015 & 2018)

Use patterns

+ On average 2,9 trips per user per month.
+ On average, 8 kms per trip (11km for taxis). 50% below 6 kilometers.
+ 1,8 passengers per car per trip (1,7 for taxis)
+ Uber users use public transit, bikesharing and carsharing more than average

Users profiles

+ Young (37 on average), but getting older (29 in 2015). 55% executives (66% in 2015)
+ Only emerging service displaying an overrepresentation of women : 62% (48% in 2015)
+ From 38% (2015) to 61% of users living in the suburbs
+ 66% of Uber users have a public transport subscription, while it is the case of only 38% of Ile-de-France residents.

Impacts

+ Impact on car equipment : -3,6 to -4,9 cars for 100 households because of Uber
+ 40% are making new trips thanks to Uber (53% among users without a driver’s license)

A diversifying user-base, a service that complements public transport and accompanies demotorisation
All in all

- **Shared e-scooters** are a fun new option, and are used in an intermodal way. They are an addition, users do not rely on them.

- **Shared e-motorscooters** are an alternative to public transport for relatively well-off male users; users rely on them intensively.

- **Dockless bikes** allow users to experiment cycling and make intermodality easier.

- **Carsharing and ridehailing** contribute to demotorisation within an efficient public transport offer.
References


6t-bureau de recherche, IAU, LVMT, Orfeuil, 2018. L’impact du service Uber sur l’utilisation de la voiture en Île-de-France, 109 pages. [https://6-t.co/impact-uber-idf/](https://6-t.co/impact-uber-idf/)


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