

Seattle Department of Transportation

2016 SEATTLE FREE-FLOATING CAR SHARING REPORT



Seattle
Department of
Transportation

INTRODUCTION

In December 2012, the Seattle City Council unanimously adopted legislation (Ordinance 124063) to authorize a free-floating car share pilot program. The pilot program began in late 2012, allowing car share vehicles to utilize on-street parking within City rights-of-way rather than in assigned spaces. Car2go, a subsidiary of Daimler, applied for and received 350 permits and shortly after expanded to 500 permits to use curb space throughout the city. A report summarizing initial car share operations was submitted to the Seattle City Council in March 2014.

In January 2015, the Seattle City Council passed Ordinance 124689 to expand the existing free-floating car sharing pilot program to allow a greater number of free floating car sharing operators and vehicles. In April 2016, a second operator, ReachNow, entered the Seattle market.

Section 3 of Ordinance 124689 directed the Seattle Department of Transportation (SDOT) to submit reports in September 2015, March 2016, and March 2017. This memo represents the March 2017 report covering car-share operations for the year 2016, with some initial data on 2017. Submittal of the 2017 report has been delayed in order to incorporate vendor survey data. Per the ordinance, this report covers:

- 1) Current members, permits issued, and fees
- 2) Parking utilization data
- 3) Survey data
- 4) Looking ahead

CURRENT MEMBERS, PERMITS ISSUED, AND FEES

As of January 2017, car2go had approximately 85,000 members in the Seattle market, up from 77,000 reported in 2016. ReachNow reported approximately 30,000 members in the Seattle market in January 2017.

In 2015, the number of permits allowed per operator was increased to 750. That 2015 legislation also delegated authority for setting any future caps on the number of car share permits to the SDOT Director. SDOT Director’s Rule #01-2016 was adopted in early 2016 and

removed all caps on the number of vehicles per operator and the number of operators. Car2go has maintained a total of 750 permits and vehicles in service in Seattle since March 2015. ReachNow has gradually increased their permits since starting operations in Seattle in April 2016, and is now up to 663 total permitted vehicles for 2017. Approximately 10% of ReachNow’s fleet are electric vehicles.

Through the history of the program, fees have been assessed as follows:

FIGURE 1: FEE STRUCTURE PER VEHICLE

	Fee 2012-2015	Fee 2015 to present
Paid Parking	\$1,030	\$930
RPZ, low-income programs, TDM	\$200	\$700
Administrative	\$100	\$100
Total Fee	\$1,330	\$1,730

Per Seattle Municipal Code 11.23.160.H: “In the event a free-floating car sharing operator’s total actual meter use in paid parking areas during the prior permit term exceeds the total paid parking area reimbursement fees required under SMC 11.23.150.C and paid for in the prior permit period, the free-floating car sharing permittee shall reimburse the City for the difference no later than February 28 of each year.”

Based on the self-reported information received from car2go and ReachNow, the following fee adjustments were paid to the City to fully compensate the City for actual parking in paid parking zones.

FIGURE 2: TOTAL FEES PAID TO CITY

	2013 car2go	2014 car2go	2015 car2go	2016 car2go	2016 ReachNow
Vehicles (end of year)	500	500	750	750	663
Total paid parking fee (through permit fee)	\$447,018	\$515,000	\$708,750	\$622,500	\$393,003
RPZ/TDM/Admin Total	\$130,423	\$150,000	\$316,667	\$600,000	\$338,067
True-Up - Difference paid to City	\$183,365	\$402,738	\$342,659	\$650,942	\$5,408
Total	\$760,806	\$1,067,738	\$1,368,076	\$1,948,442	\$736,478
Total per vehicle per month	\$162	\$119	\$166	\$217	\$145

Note that fees are prorated by month. In 2016, ReachNow started operations with fewer vehicles and added more at several points throughout the year.

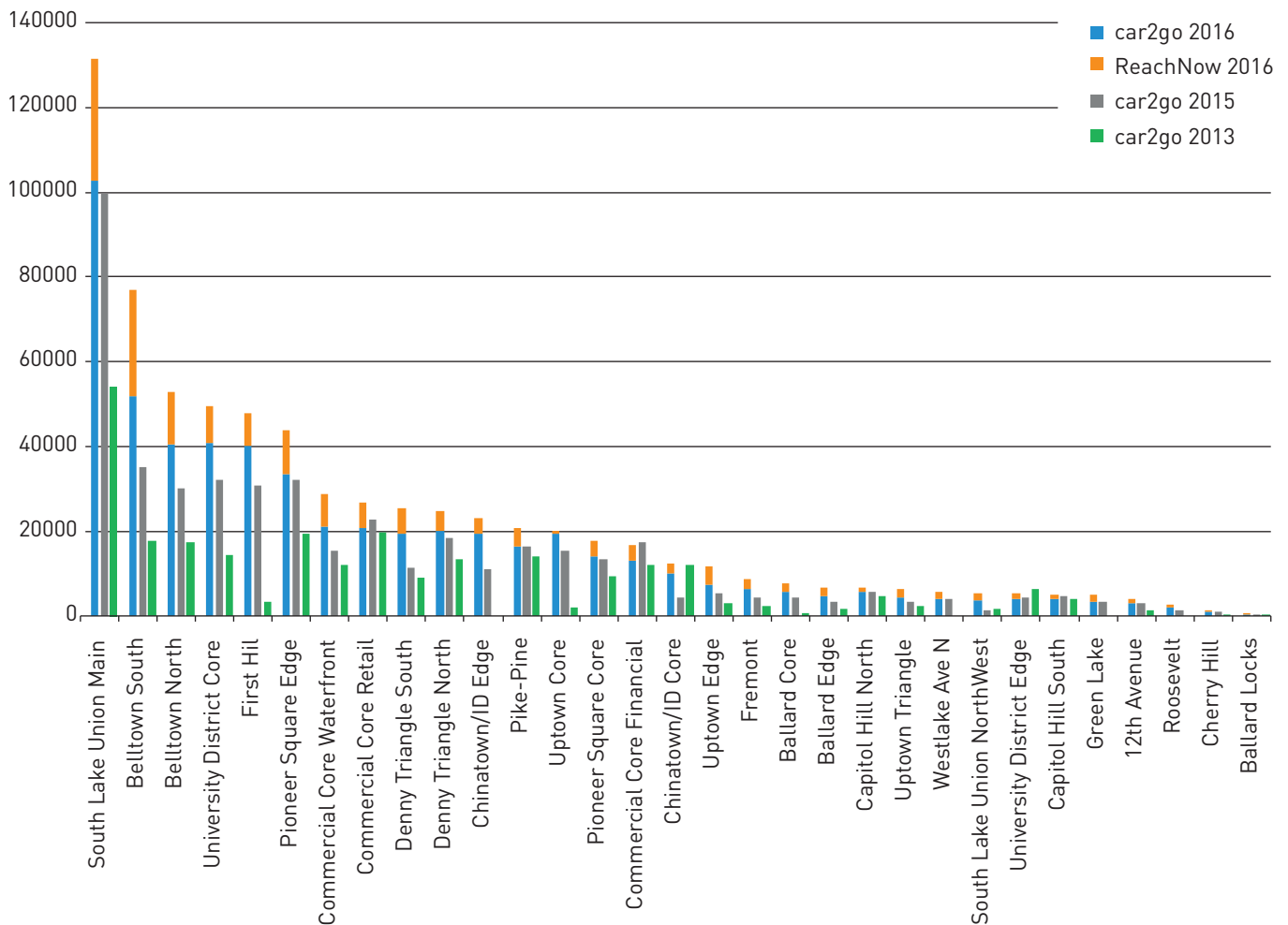
PARKING UTILIZATION DATA

The following chart summarizes parking utilization by car2go and ReachNow in paid areas. Operators recorded the total number of hours their vehicles were parked in each area. The total number of hours used in paid parking areas increased with the addition of more vehicles

and an additional operator. The following chart provides historical context, comparing total hours in 2016 to car2go-only hours in 2015 and 2013 (2014 data were not available). Note that for 2016 car2go and ReachNow data are shown stacked in a single column.

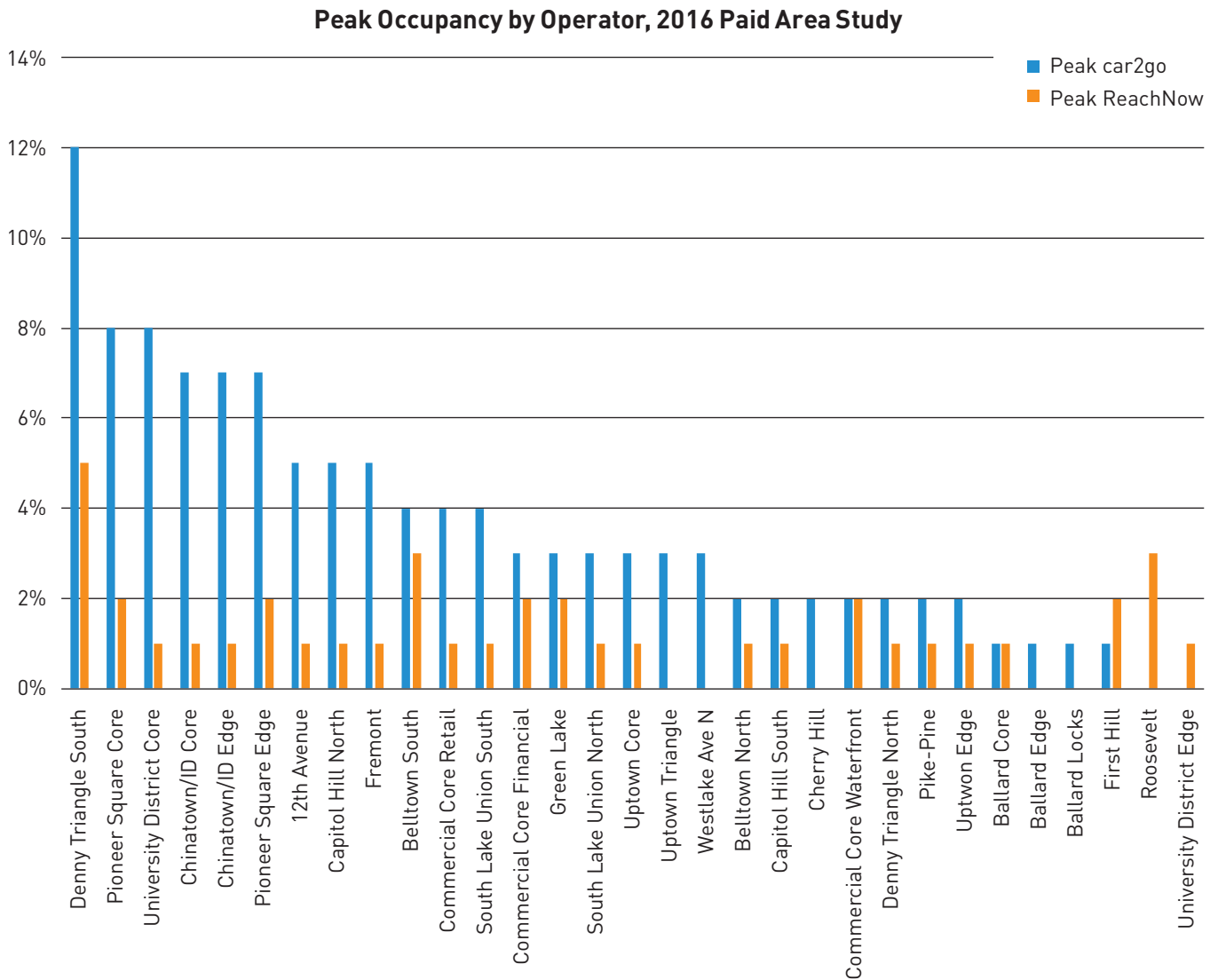
FIGURE 3: PAID PARKING UTILIZATION

Total Hours in Paid Parking Areas, 2013-2016



The following chart shows data from our annual paid parking study and represents the maximum percentage of spaces in that neighborhood that were occupied by car2go or ReachNow vehicles at the time of our spring 2016 study. The Denny Triangle South neighborhood had the highest occupancy of free-floating car sharing vehicles, with 12% of spaces occupied by car2go at peak hours and 5% of spaces occupied by ReachNow.

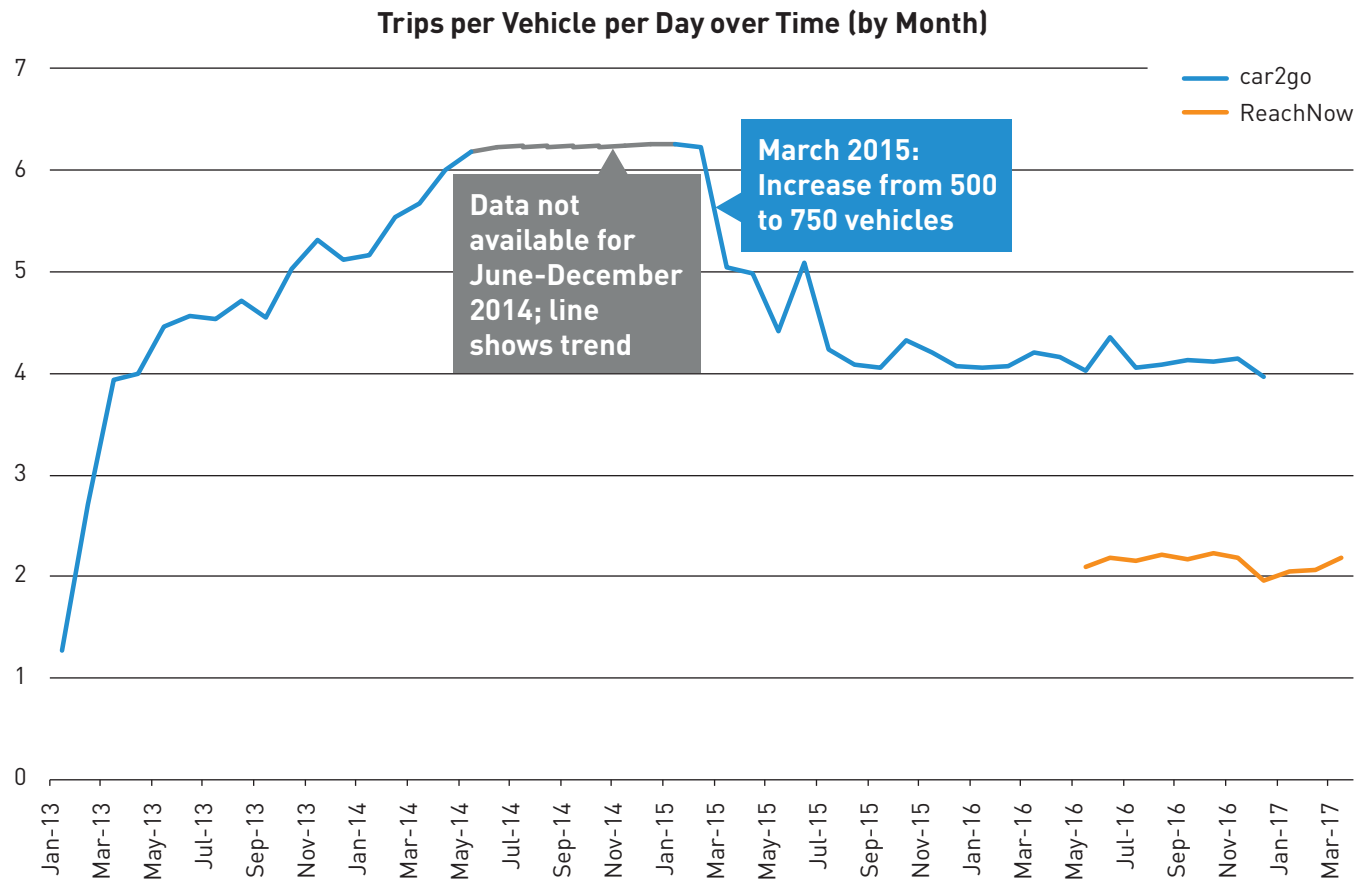
FIGURE 4: CAR SHARE VEHICLES IN ANNUAL PARKING STUDY: MAXIMUM OCCUPANCY



As shown in the figure below, the average number of trips per vehicle, per day throughout 2015 was approximately 4.75. There was a dip in the number of trips per vehicle per day when the number of vehicles was increased from 500 to 750 in March 2015. In 2016, car2go trips per vehicle per day kept pace with averages from the second half of 2015, at just over 4 trips per vehicle per day.

ReachNow provided data for operations beginning in May 2016 through the first quarter of 2017. Their vehicles averaged 2.1 trips per vehicle per day.

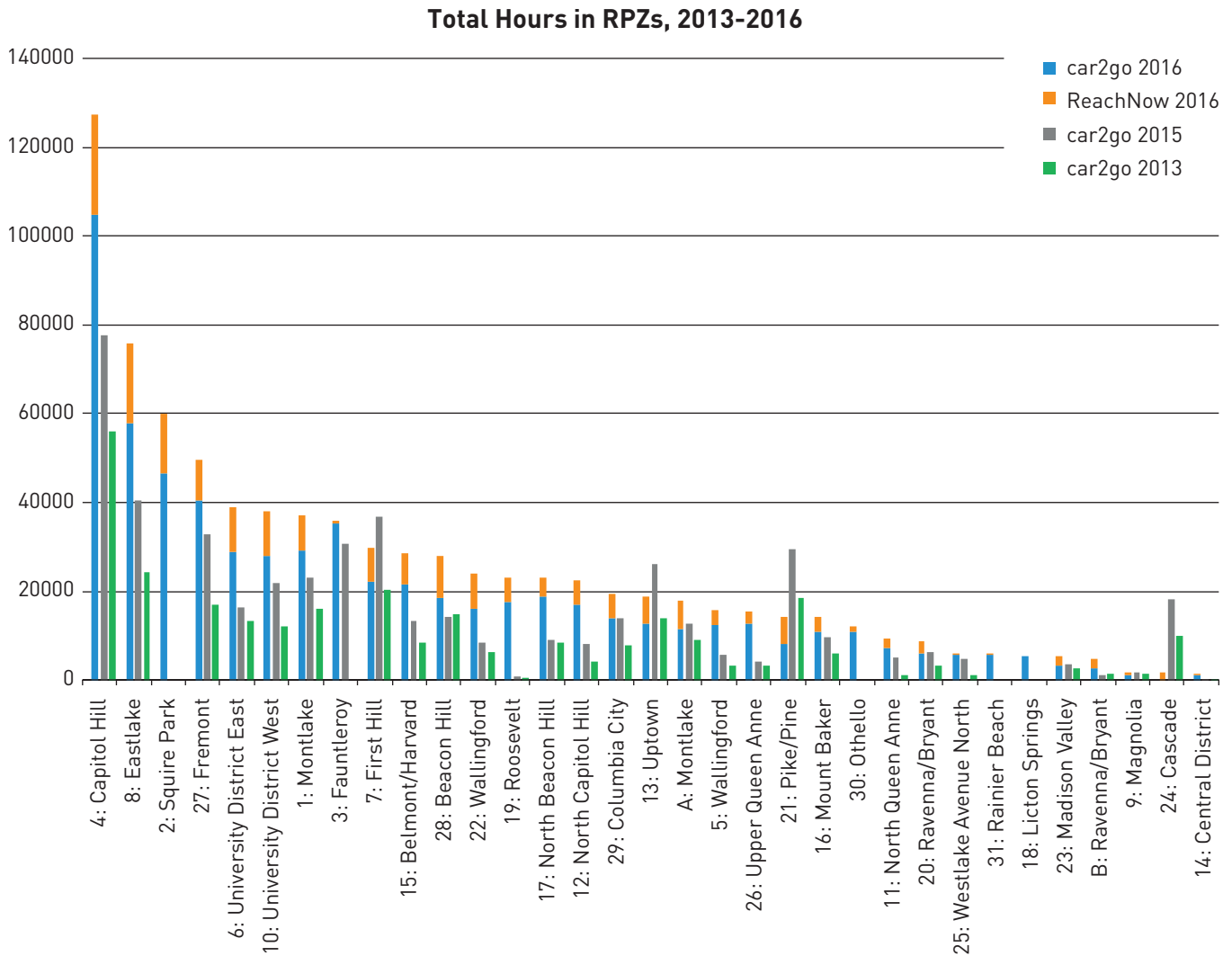
FIGURE 5: TRIPS PER VEHICLE



For Restricted Parking Zones (RPZs), operators provided data based on the number of hours vehicles were parked in each zone throughout each year. These hours represent less than 1% of the total hours of parking available in these zones. In 2016, the zones with the highest number of hours parked by car2go and ReachNow

vehicles included Capitol Hill, Eastlake, Squire Park, and Fremont. Most areas saw an increase in the total number of hours free-floating car sharing vehicles were parked there, though First Hill, Uptown, and Pike-Pine all saw car sharing vehicles parked for fewer total hours in 2016 than in 2015.

FIGURE 6: PARKING UTILIZATION IN RESTRICTED PARKING ZONES (RPZS)



SURVEY DATA

As part of its permitting requirements, car2go and ReachNow each completed an annual survey of their Seattle area members in 2016. The survey was developed by the Transportation Sustainability Research Center at the University of California, Berkeley in 2015 in collaboration with SDOT and car2go. Car2go’s survey was provided to SDOT in April 2016 and collected in early 2016. SDOT previously reported these figures from car2go in a report in October 2016, describing the results as from 2015. However, that survey was conducted in 2016, and is included in the discussion below.

Car2go’s member survey in 2016 received 874 responses. ReachNow received 2,977 responses to their survey in 2016.

The 2016 car2go survey indicates that 74% of the households own one or zero personal vehicles in their household. This is an increase from 68% in the 2013 survey. ReachNow’s 2016 survey indicated that 57% of households own one or zero personal vehicles.

FIGURE 7: VEHICLE OWNERSHIP PER HOUSEHOLD BY OPERATOR AND YEAR

Number of Cars	ReachNow 2016	Car2go 2016	Car2go 2013
0	12%	27%	26%
1	45%	47%	42%
2	35%	21%	24%
3	3%	4%	6%
4 or more	2%	1%	3%

In addition, 20.8% of respondents on car2go’s 2016 survey reported getting rid of a personal vehicle because of, or partially because of, car2go and other mobility services (including other car sharing operators and transportation network companies) at some time. In ReachNow’s survey, 8% of users reported getting rid of a vehicle because of, or partially because of, ReachNow.

The most commonly reported trip types by ReachNow users on their most recent trip were:

- To go to and/or from in-town social/recreational activities (24%)
- To commute to or from work (21%)
- To go to/from a restaurant (15%)

The most commonly cited reasons for choosing ReachNow were that it was the most convenient option, or the most convenient and most cost-effective option (79% total).

The plurality of rentals on ReachNow were 10 to 20 minutes (48%), with 85% of rentals reported as being 30 minutes or less.

FIGURE 8: MEMBER USE OF OTHER TRANSPORTATION OPTIONS, 2016, BY OPERATOR

2016 car2go Member Use of Transportation Options Since Joining			
	More often	Less often	Same
Public transportation	19%	23%	58%
Taxis	1%	66%	32%
TNCs (Uber, Lyft, etc.)	12%	43%	46%
Personal bicycle	6%	10%	84%
Walk	23%	6%	71%

2016 ReachNow Member Use of Transportation Options Since Joining			
	More often	Less often	Same
Public transportation	10%	54%	36%
Taxis	3%	87%	10%
TNCs (Uber, Lyft, etc.)	3%	81%	16%
Personal bicycle	12%	48%	40%
Walk	16%	44%	40%

Note that these tables do not include members who reported never having used the transportation option listed.

FIGURE 9: MEMBER TOTAL MILES DRIVEN, 2016 COMPARED WITH PREVIOUS YEARS, IN PRIVATELY-OWNED AND/OR CAR SHARING VEHICLES

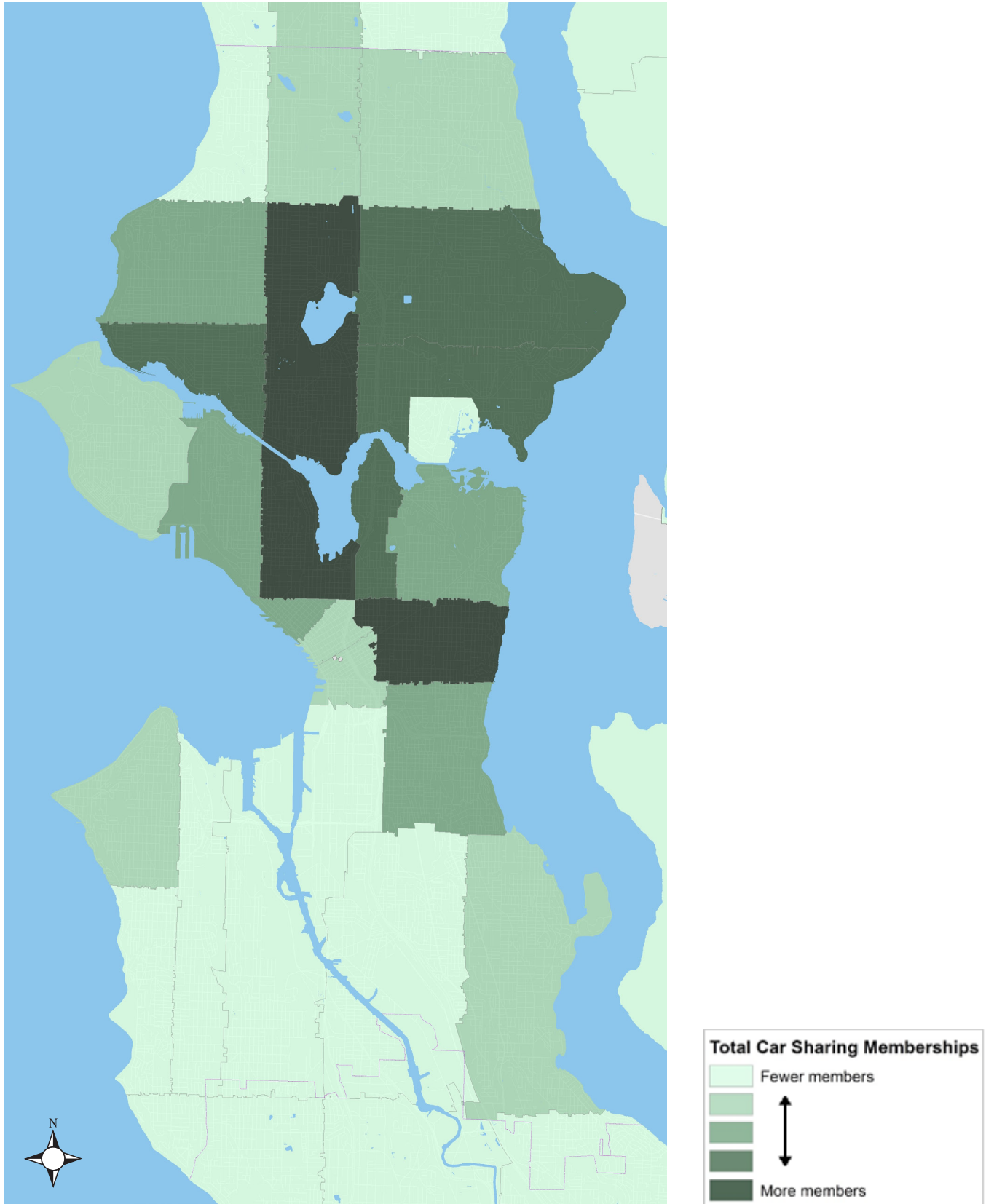
Operator	More miles	Fewer Miles	About the same
Car2go	22%	20%	47%
ReachNow	19%	12%	64%

Users were asked how often they have another person with them in a car sharing vehicle; on the survey of car2go users, 47% reported that they at least occasionally transport another passenger. On the survey of ReachNow users, 59% reported that they at least occasionally transport another passenger. Some users reported driving less or much less than they did before car sharing.

For car2go, 20% of respondents said that they drive less or much less. For ReachNow, 12% of respondents said they drive less or much less than they did before.

Users also reported their Zip Codes. The map below shows the sum of Zip Codes as reported in both ReachNow and car2go 2016 surveys.

FIGURE 10: MAP OF MEMBER ZIP CODES AS REPORTED ON SURVEYS



The Zip Codes with the most members reporting living there were:

- 98103 – Fremont/Greenwood/Green Lake
- 98122 – Capitol Hill/Central District/
Madrona
- 98109 – South Lake Union/Queen Anne
- 98115 – Ravenna/Wedgwood
- 98105 – University District/Ravenna/
Laurelhurst

LOOKING AHEAD

SDOT anticipates that Seattle will continue to be an attractive city for prospective car sharing operators. In 2017, we have worked to strengthen permitting conditions and relationships with existing operators to increase the quantity of data we can receive from them and improve the quality of that data. In particular, we are working to gain full access to their Application Program Interfaces (APIs) so that we can audit car sharing usage. Car sharing continues to be a viable alternative to private vehicle ownership and has helped support some residents in reducing reliance on owning a personal vehicle. Some current SDOT efforts

include expanding the number of on-street car sharing parking spaces and encouraging additional off-street spaces. We are also working on a Shared Mobility Hub program that will strengthen connections between car sharing and public transit, assist with first and last mile connections to transit, and create locations where customers can expect to find available car share vehicles and other transportation options. We will continue to proactively develop policy and programs to support multimodal transportation options, as well as monitor how car sharing operates in support of the City's goals.



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