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2014 CarShare Research

Final Report



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Background & Methodology

Methodology

- ◆ Telephone survey conducted with a randomly selected sample of 800 Calgarians aged 18 years and older between November 4th and 24th, 2014.
 - ❖ The average interview length was 18 minutes.
- ◆ Final data were weighted to ensure the overall sample's quadrant, ward and age/gender composition reflects that of the actual Calgary population aged 18 or older according to 2011 Federal Census data.
- ◆ The margin of error for the total sample of 800 is ± 3.5 percentage points, 19 times out of 20.
 - ❖ The margin of error by quadrant is as follows:
 - Northeast: n=160 (MOE $\pm 7.8\%$)
 - Northwest: n=224 (MOE $\pm 6.6\%$)
 - Southeast: n=178 (MOE $\pm 7.8\%$)
 - Southwest: n=240 (MOE $\pm 6.3\%$)

Overall Assessment

- ◆ While there is general support for CarShare services in Calgary, there appears to be a general lack of understanding about the benefits and how the services operate in the City. Most Calgarians disagree that CarShare services make it difficult to find on-street parking in non-residential areas and that they create more problems than solutions. Moreover, a majority recognize that the service provides an economical alternative to car ownership and half of Calgarians agree that the service is important to a growing city.
- ◆ Three-quarters of Calgarians believe it is important for CarShare users to have flexibility in where they can park, and a majority believes these vehicles should be allowed to park in reserved spots and adjacent to other uses (e.g. parks, schools, businesses, and boulevards). There is weaker interest in allowing CarShare vehicles to park adjacent to homes, in Residential Parking Permit (RPP) areas, and a small minority of individuals believe that CarShare vehicles should not be allowed to park in any residential area.
- ◆ Considering some of the policy elements, a strong majority of non-CarShare users do not believe it is important to have this available in their neighbourhoods, while half support reducing the amount of parking required for new residential buildings when CarShare spaces were provided. There is a win when it comes to having dedicated CarShare spots in Transit Park and Rides and half of all Calgarians believe there should be a mix of both reserved and regular use on-street parking for CarShare vehicles.

Key Findings

Awareness of CarShare services in Calgary is moderate.

- ◆ Overall, half (51%) of Calgarians say that they are familiar with CarShare services; highest among residents of the Southwest (56%) and Northwest (58%), compared to the Southeast (45%) and Northeast (43%). Current CarShare users familiarity with the program is 93%.

Access to a vehicle for those who may not be able to afford one and general convenience are the top stated benefits of CarShare services in Calgary.

- ◆ On an unaided basis, one-quarter (24%) of Calgarians say that the primary benefit of CarShare services in Calgary is *“good for people who do not have/can’t afford a car”*, followed by general *“convenience”* (21%). Other top mentions include *“less traffic/fewer cars on the road”* (17%), *“cost/affordability”* (15%), *“accessible/available”* (12%) and *“parking benefits/parking is easier”* (12%).
- ◆ Among current CarShare users, top benefits are *“convenience”* (48%), *“parking benefits/parking is easier”* (28%), and *“cost/affordability”* (26%).

Key Findings

Parking concerns and vehicle availability are the primary stated drawbacks of CarShare services.

- ◆ On an unaided basis, 16% of Calgarians say that the primary drawback of CarShare services in Calgary is “*parking/lack of parking spaces*”, followed by “*availability of a vehicle*” (16%). Other mentions include “*destination/limited destination*” (4%), “*location (drop-off/pick-up)*” (4%), and “*cars being left anywhere*” (3%). It should be noted that 13% of respondents stated that there are *no drawbacks* to CarShare services and one-quarter (25%) said that they did not know.
- ◆ Among current CarShare users, top drawbacks are “*destination/limited destination*” (19%), “*availability of a vehicle*” (19%), and “*parking/lack of parking spaces*” (18%). One-quarter (23%) of current CarShare users say that there are no drawbacks and one in ten (11%) said they don’t know.

Key Findings

A majority of Calgarians agree that CarShare services provide economical alternatives to car ownership and that they are important to a growing City.

- ◆ Overall, six in ten (60%) Calgarians agree that *“CarShare services are an economical alternative to owning a car”*, with agreement strongest among Southwest residents (68% compared to 55% among Southeast residents and 56% among Northeast residents) and current CarShare users (77% compared to 58% among those who have never used the service).
- ◆ While 53% of Calgarians agree that *“CarShare services are important for a growing city like Calgary”*, results do highlight stronger agreement among Southwest residents (63% compared to those living in the Southeast (47%) and Northeast (46%) and current CarShare users (83% compared to 49% among those who have never used the service).
- ◆ Just 13% of all Calgarians agree that *“CarShare services make it difficult to find parking on non-residential streets in Calgary”* and is highest among Southeast residents (20% compared to 9% among Southwest residents) and Calgarians older than 55 years (20% compared to 9% among 18-34 year olds and 12% among 34-54 year olds).
- ◆ Only a minority of Calgarians agree that *“CarShare services help to create more parking spots and stalls”* (20%), *“The City of Calgary should better regulate CarShare services”* (19%), *“The City of Calgary does a good job of regulating CarShare services”* (14%), *“CarShare services make it difficult to find parking on residential streets in Calgary”* (11%), and *“CarShare services create more problems than solutions”* (7%).

Key Findings

The vast majority of Calgarians have not used a CarShare vehicle.

- ◆ Overall, 86% of Calgarians say that they have *never used a CarShare service in Calgary*, while 6% report being past members and 8% report being current members. Calgarians between the ages of 18-54 are more likely to report being current members (10% among 18-34 years and 11% among 35-54 years, compared to 2% among 55 years and older). Two-thirds (68%) of current users have had their membership for longer than one year.
- ◆ Among those not using the service, top responses to “encourage their use of a CarShare service” include *If I didn't have a vehicle/ if my vehicle broke down* (15%), *availability/ available in my area* (14%), *affordability/ more economical* (10%), and *if I worked/ lived downtown* (10%).
- ◆ Considering the impact of CarShare on the behaviours of current and past users, over four in ten (44%) say that they have *reduced the amount of driving you do in your own personal vehicle*, while one in five have *forgone the purchase of a new private vehicle* (20%) and *reduced the total amount of driving you do* (18%). One in ten say that they have *increased the amount they use Calgary Transit* (10%) and *reduced the number of private vehicles they own* (8%).
- ◆ Four in ten (42%) CarShare users take the vehicles for both work-related and personal trips, while 32% say personal trips only and 12% say for work-related trips only.
- ◆ Among the small minority (44 respondents) who say that they use both Calgary Transit and CarShare services, 75% do so separately and one-quarter *use them together to get where they are going*.

Key Findings

A majority of Calgarians support CarShare vehicles parking in reserved/dedicated spots and adjacent to other uses (e.g. parks, schools, businesses, boulevards). There is less appetite for having these vehicles adjacent to homes and in RPP areas.

- ◆ Two-thirds (66%) of Calgarians say that CarShare vehicles should be allowed to park in *reserved spots* and just over half (56%) say *adjacent to other uses* (e.g. parks, schools, businesses, boulevards). Just four in ten (40%) say *adjacent to homes* and three in ten (32%) say *in RPP areas*.
- ◆ Results are notably different among current CarShare users.
 - ❖ Reserved spots (85%)
 - ❖ Adjacent to homes (79%)
 - ❖ Adjacent to other uses (73%)
 - ❖ RPP areas (57%)

If considering the purchase of a new house or condo, a minority (29%) of non-CarShare users believe it is important to have this service in their neighbourhoods.

Key Findings

Half of Calgarians support reducing the amount of parking required for new residential buildings when CarShare spaces were provided.

- ◆ The top reasons for supporting this idea include:
 - ❖ Sounds good/ I like this idea (7%)
 - ❖ Less traffic/ fewer cars on the road (6%)
 - ❖ Good for people who don't own vehicles/ who uses CarShare (4%)
 - ❖ Encourages people to use CarShare program (4%)
 - ❖ Good for the environment/ less pollution (4%)
- ◆ The top reasons for opposing this idea include:
 - ❖ Residential owners should have parking spots for their vehicles (10%)
 - ❖ Make parking available to everybody/ there should be no preferences (10%)
 - ❖ There is not enough parking/ the City should provide more parking spaces (8%)
 - ❖ Takes up private/ residential parking spaces (7%)

Key Findings

Half (51%) of Calgarians support a mix of dedicated parking spaces and use of regular on-street spaces for CarShare Vehicles.

- ◆ Three in ten (28%) support being *able to park in any legal on-street parking space, but not have reserved spaces* and 17% support having *dedicated parking spaces on-street, but not be allowed to use regular on-street parking spaces*. There are no statistically significant differences among CarShare users.

A solid majority of Calgarians support dedicated CarShare parking spots at Calgary Transit Park and Ride lots.

- ◆ Overall, 69% of Calgarians support dedicated spots for CarShare vehicles in Calgary Transit Park and Ride lots, with support strongest amongst current CarShare users (91%). If the dedicated stalls did not reduce the existing number of stalls, 59% of all Calgarians say that they would be more likely to support the concept.

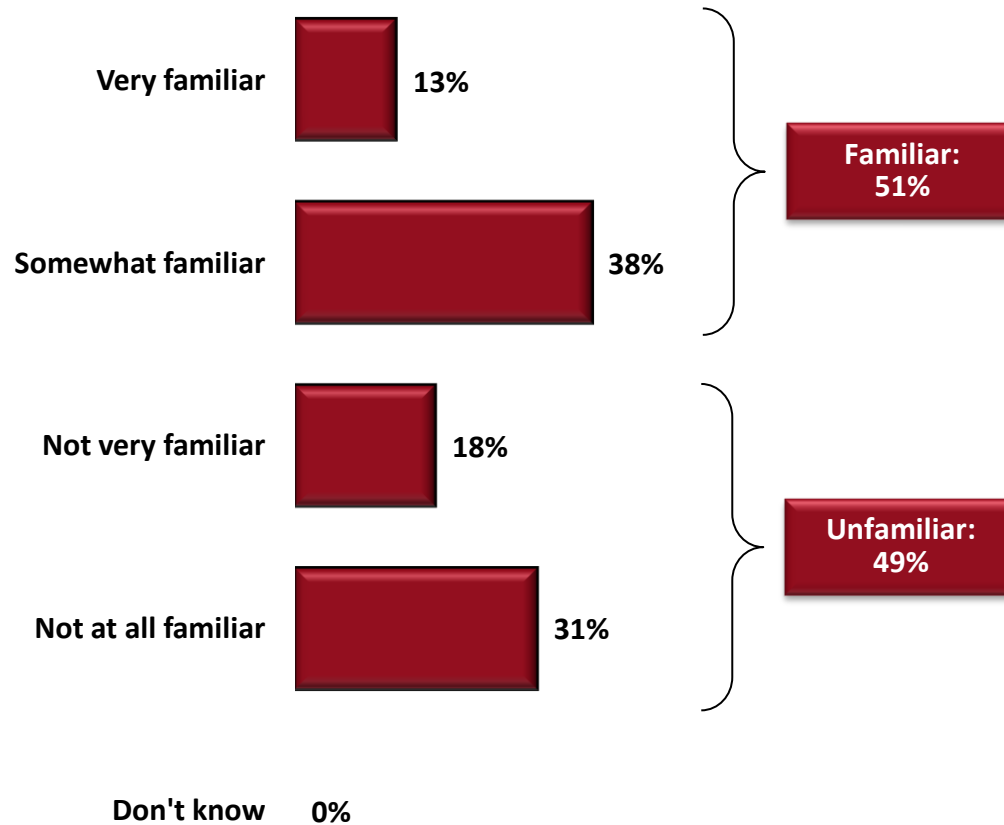


Detailed Findings



Views and Attitudes about CarShare Services

Familiarity with CarShare services in Calgary

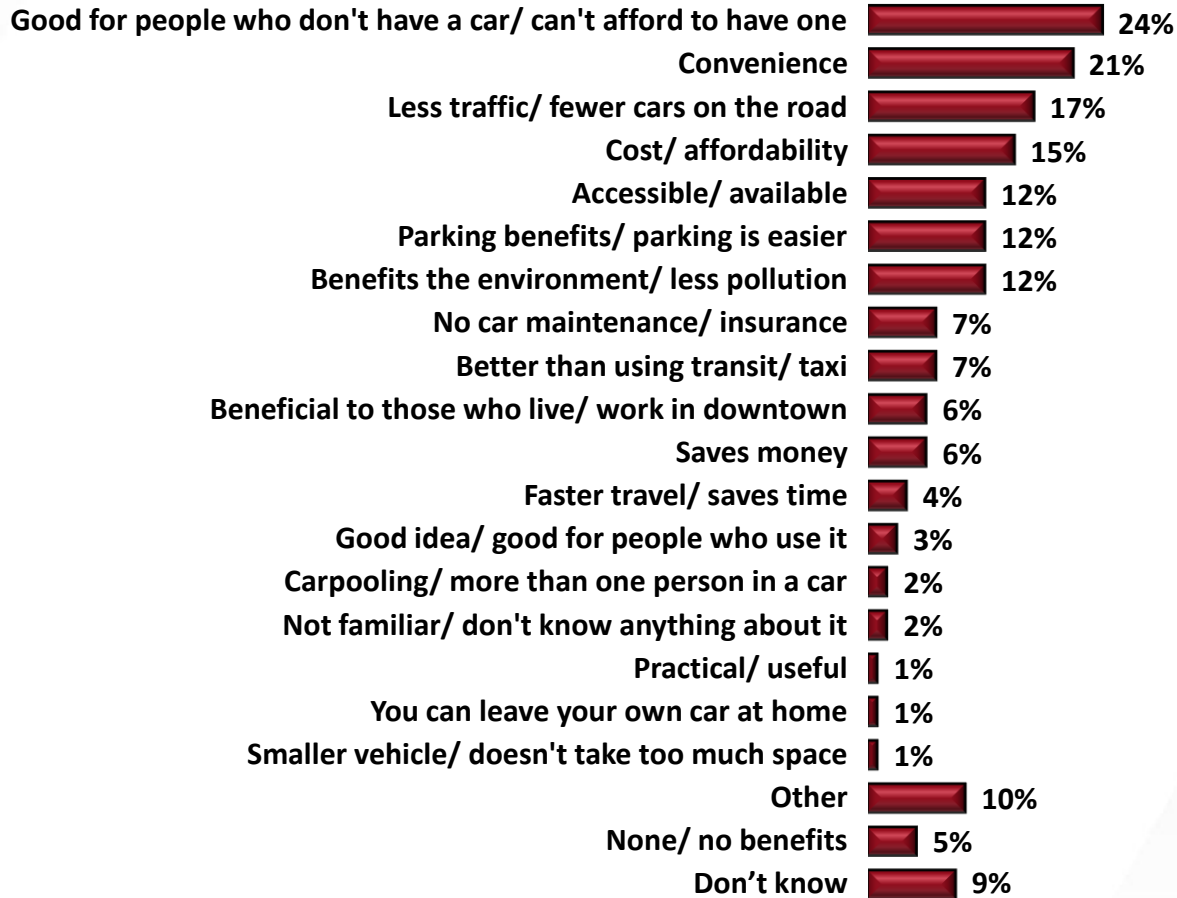


Q1. How familiar are you with CarShare services in Calgary?

Base: All respondents (n=800)

Benefits of CarShare Services

Multiple Mentions

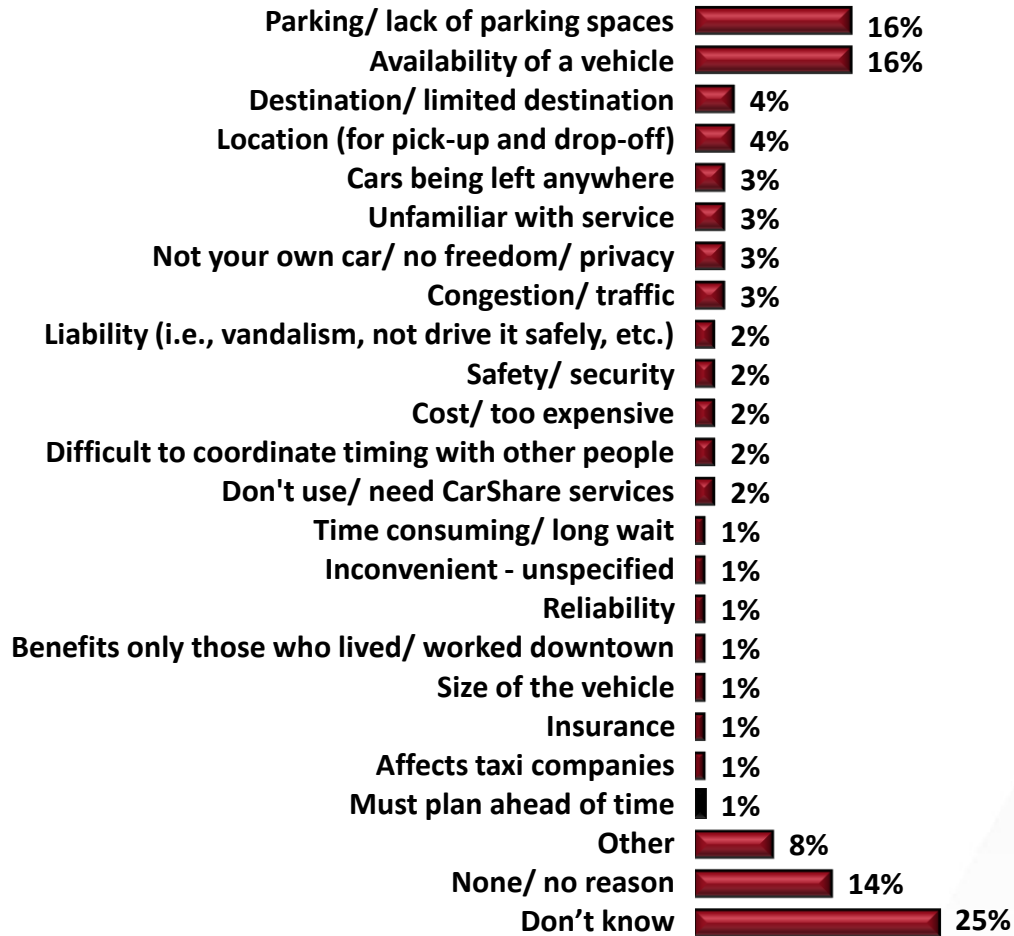


Q2. Based on your own knowledge and or experiences, what are the primary BENEFITS of having CarShare services in Calgary?

Base: All respondents (n=800)

Drawbacks of CarShare Services

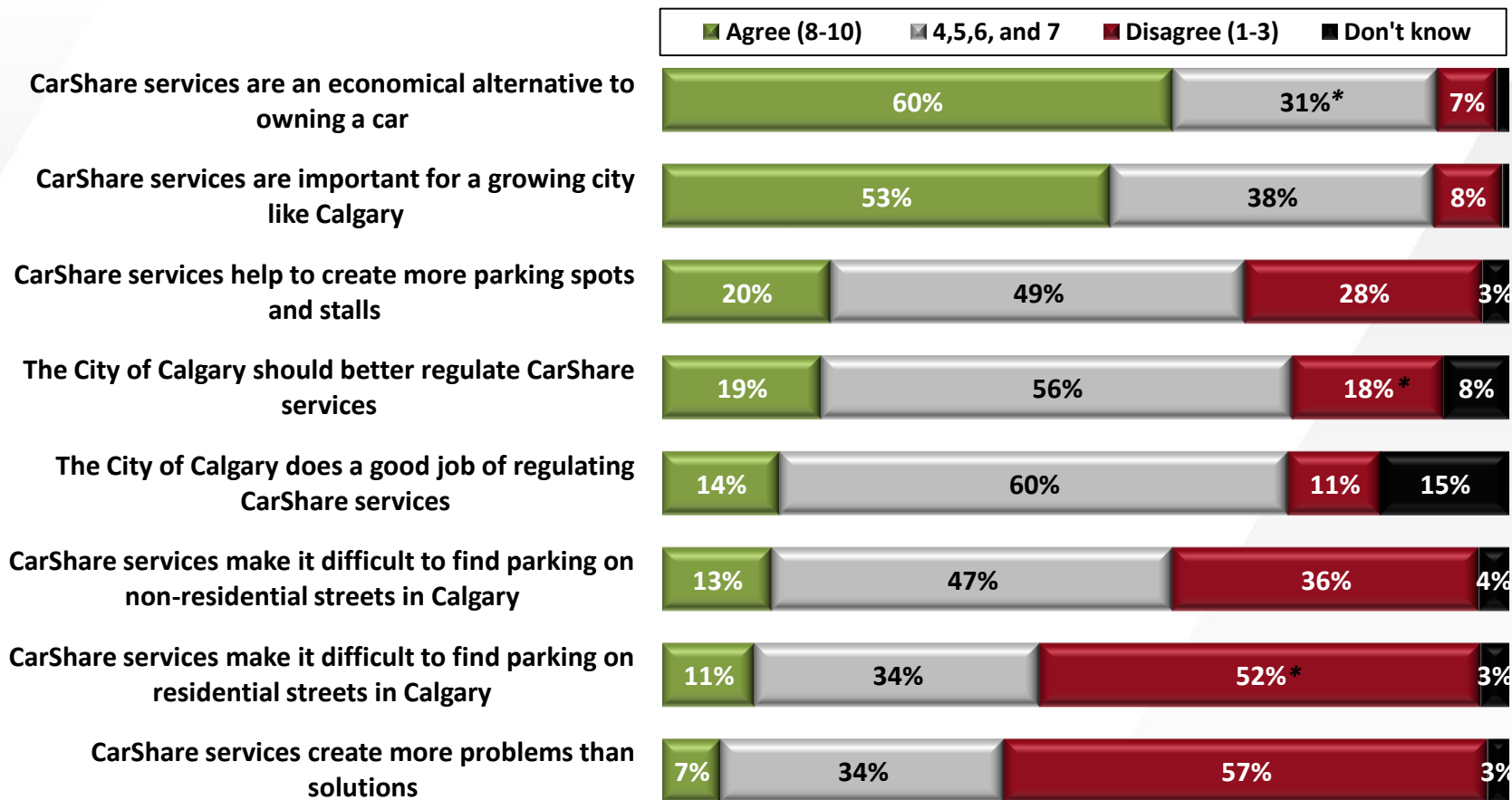
Multiple Mentions



Q2a. Based on your own knowledge and or experiences, what are the primary DRAWBACKS of having CarShare services in Calgary?

Base: All respondents (n=800)

Agreement to Statements – Perceptions about CarShare Services



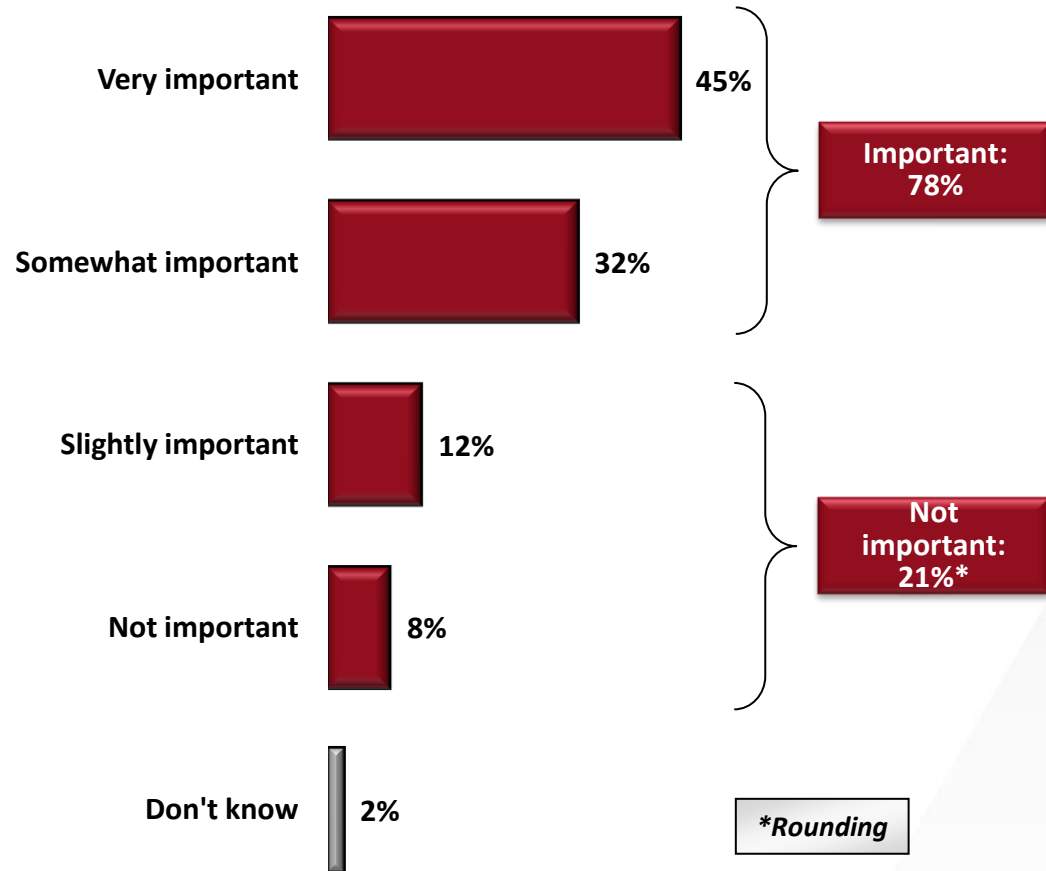
*values less than 2% not labelled

Q3. Please indicate whether you agree or disagree with each statement using a scale from 1 to 10, where '1' is 'completely disagree' and '10' is 'completely agree'.

Base: All Respondents (n=800)

*Rounding

Importance of Parking Flexibility

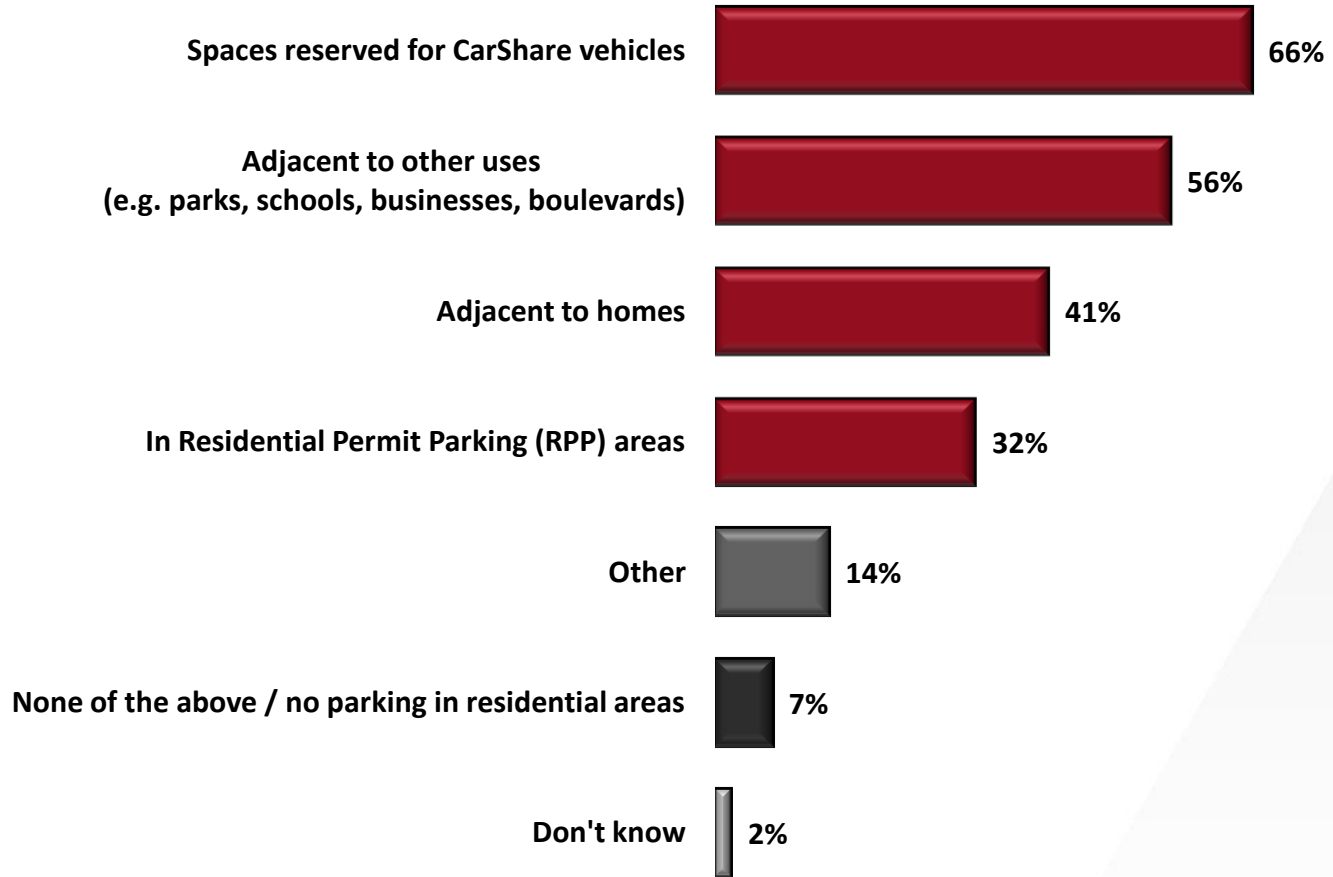


Q4. How important is it for CarShare users to have flexibility in where they can park?

Base: All respondents (n=800)

CarShare Residential Parking Preference

Multiple Mentions



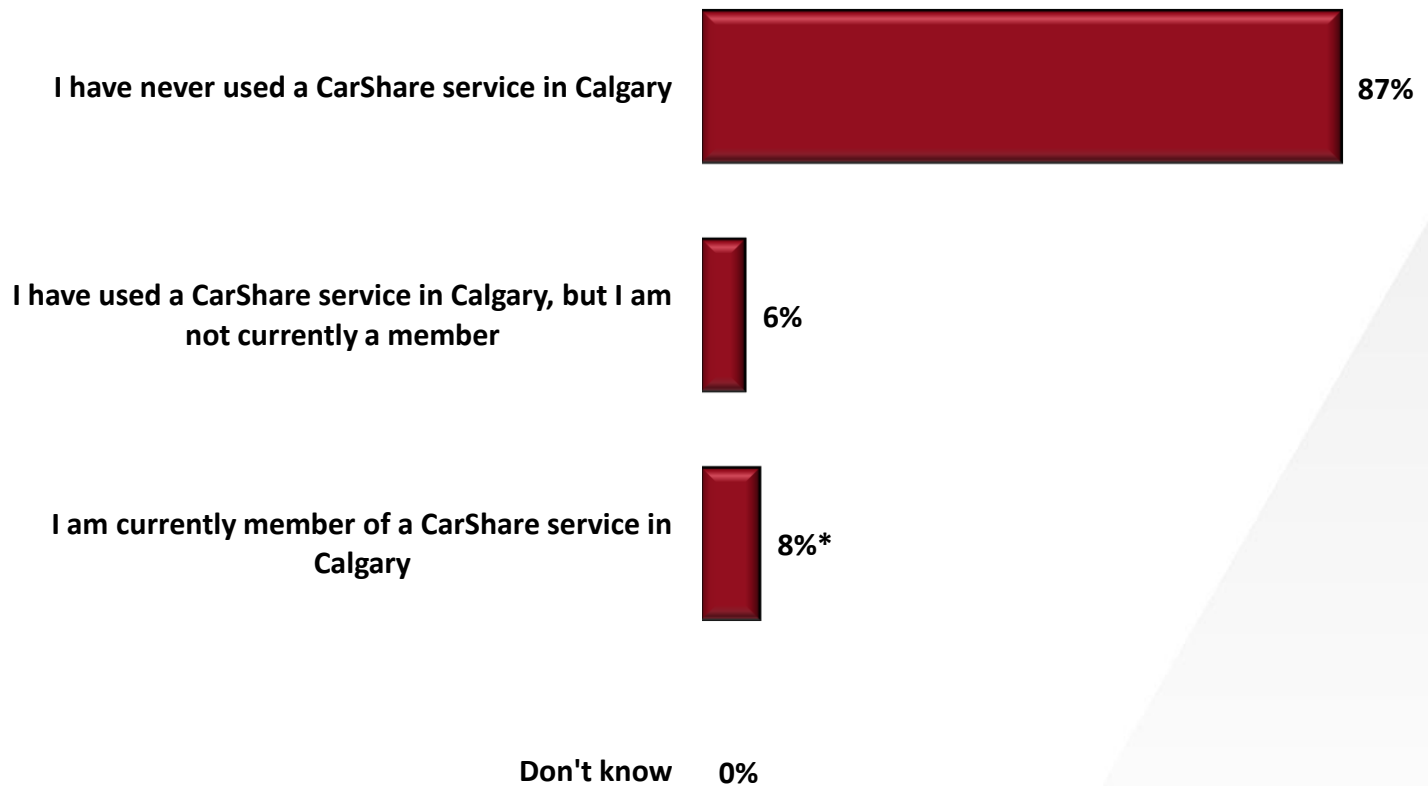
Q5. Which residential areas should CarShare vehicles be allowed to park in?

Base: All respondents (n=800)



Use of CarShare Services & CarShare Users

Personal History with CarShare

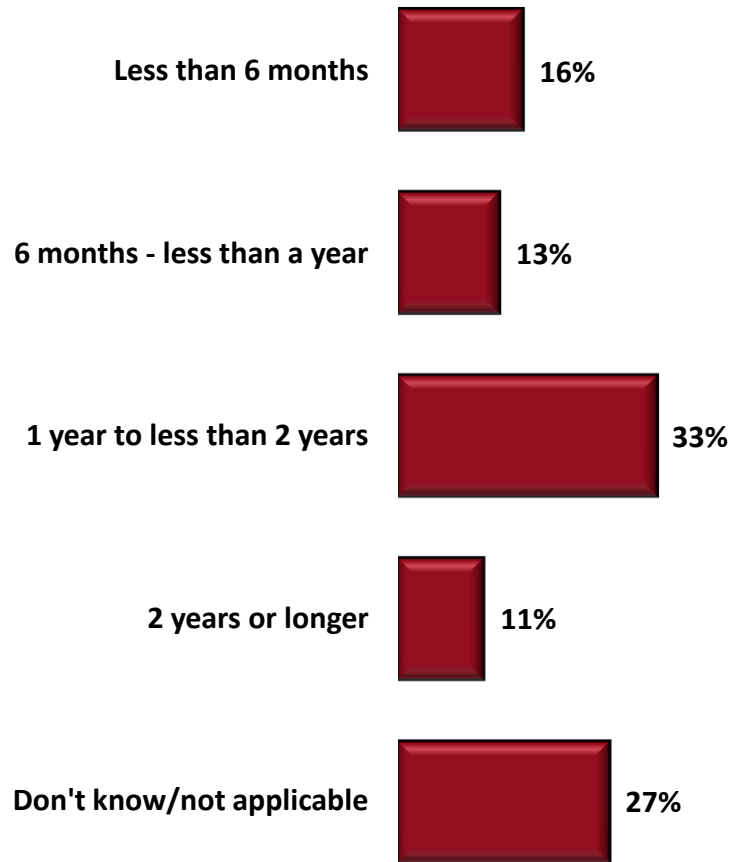


Q6. Which of the following best describes you personally?

Base: All respondents (n=800)

***Rounding**

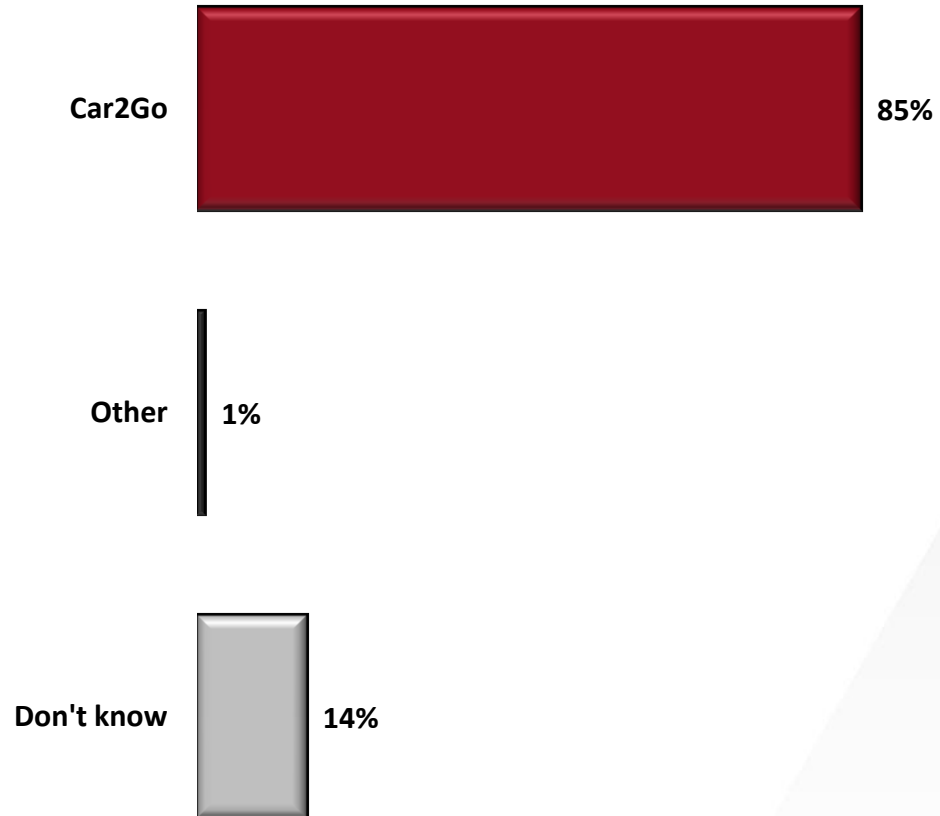
Length of Time as a CarShare Member



Q7. How long have you been a CarShare member?

Base: CarShare Users (n=89)

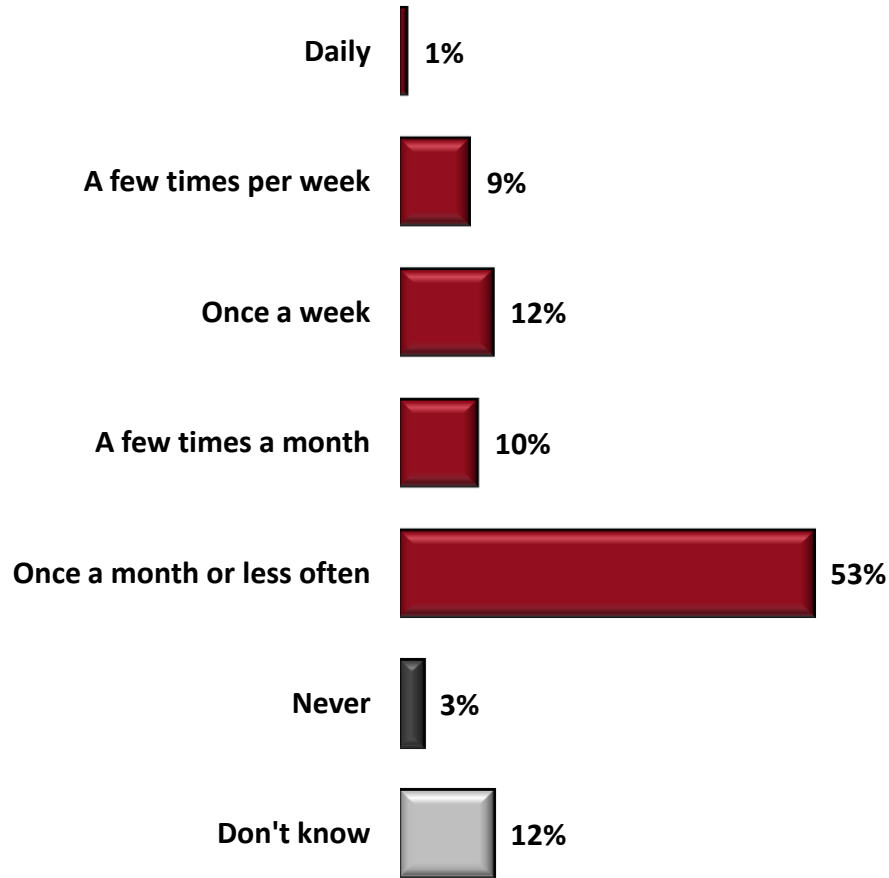
CarShare Membership



Q8. Which CarShare service are you, or were you a member of?

Base: CarShare Users (n=89)

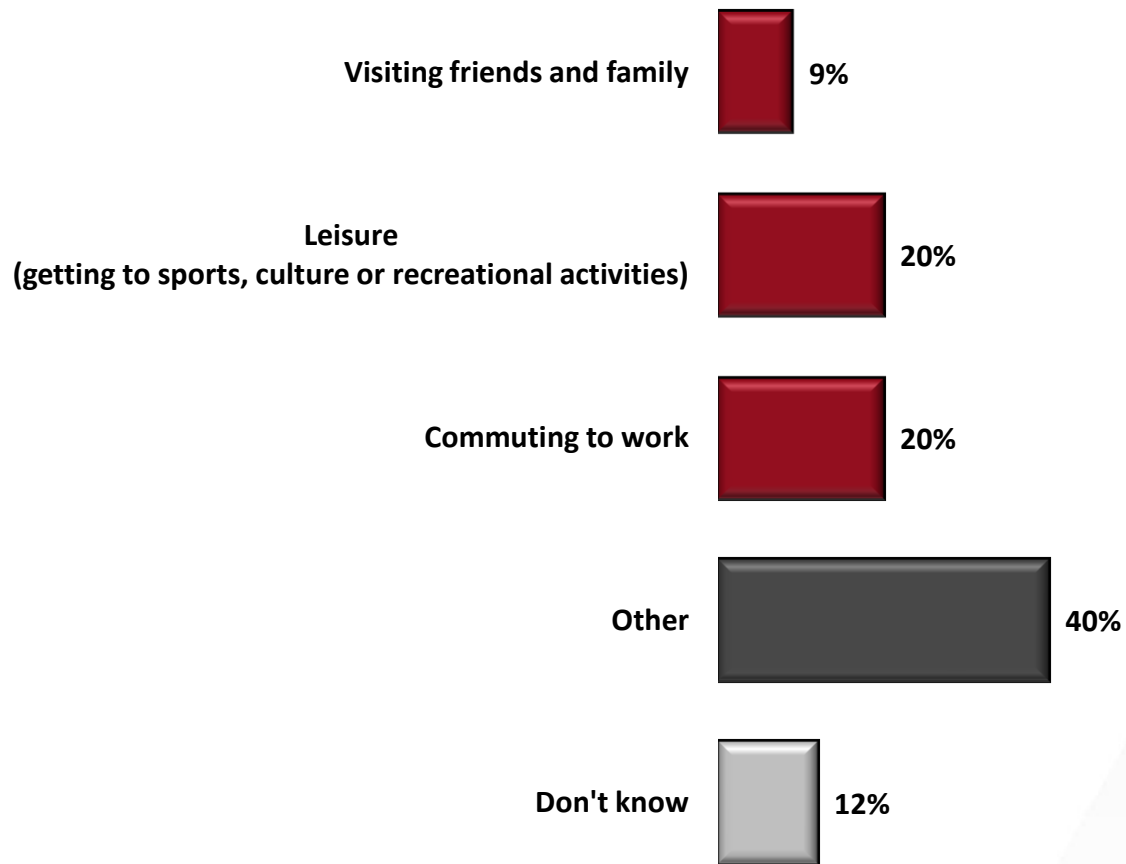
Frequency of CarShare Use



Q9. How often do you use a CarShare vehicle?

Base: CarShare Users (n=89)

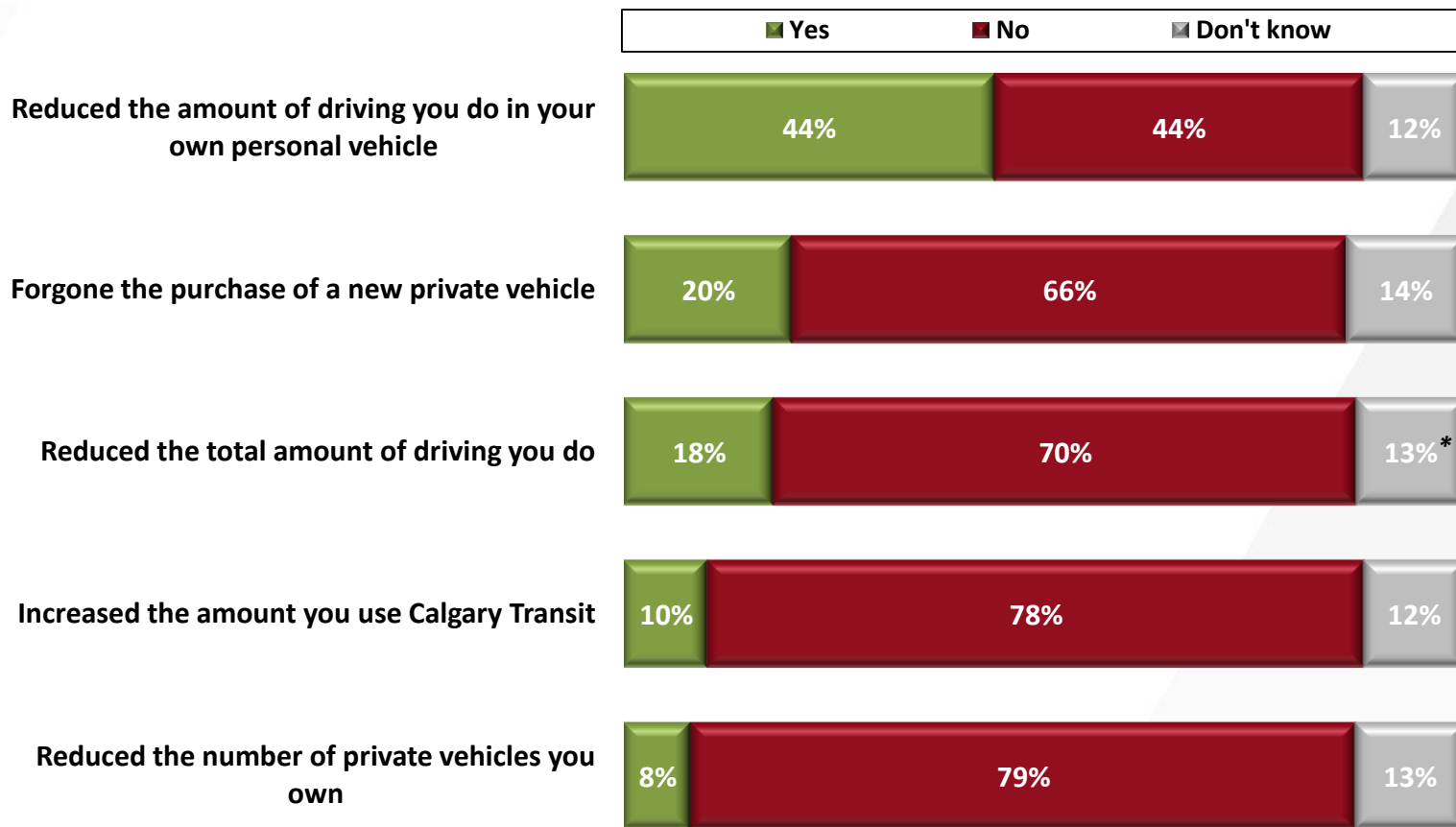
Reasons for Using a CarShare Service



Q10. What is the MAIN reason you use a CarShare vehicle?

Base: CarShare Users (n=89)

Behaviours Since Becoming A CarShare Member

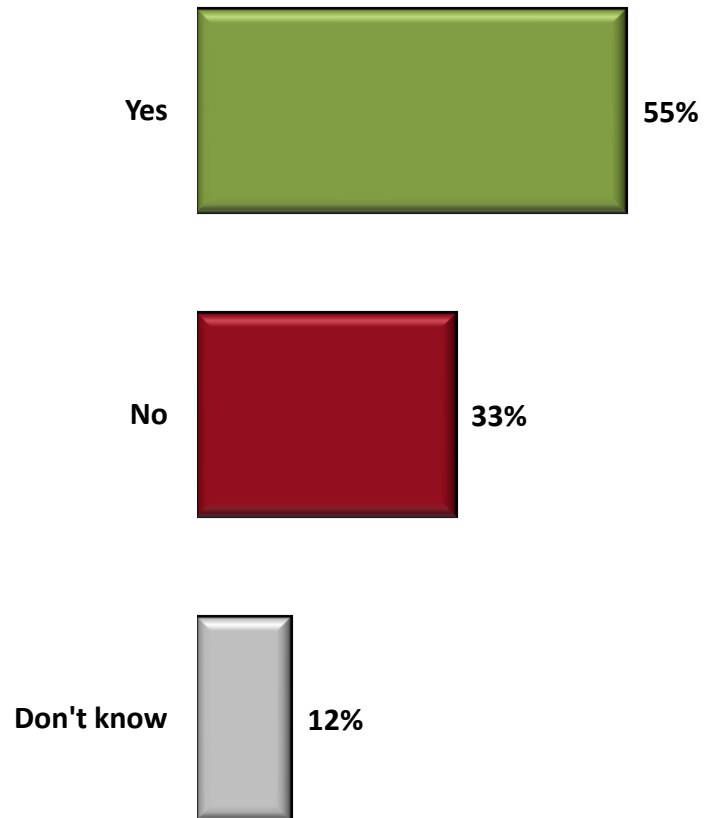


Q11. Since becoming a CarShare member, have you...?

Base: CarShare users (n=89)

*Rounding

Use of CarShare and Calgary Transit

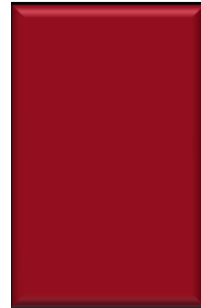


Q12a. Do you use both CarShare and Calgary Transit?

Base: CarShare Users (n=89)

Use of Calgary Transit & CarShare

Use them together to get where you're going



25%

Use them separately

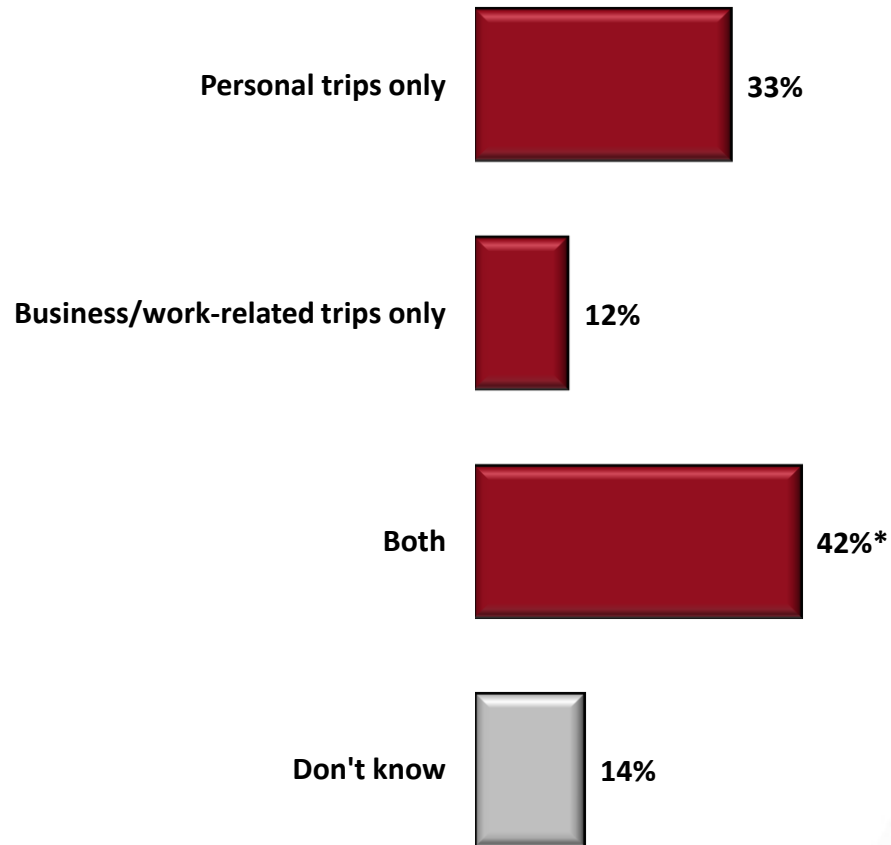


75%

Q12b. Do you...

Base: Used Both CarShare And Calgary Transit (n=44)

CarShare Use – Personal & Work-Related Trips



Q13. Do you use CarShare vehicles for personal trips, work-related trips, or both personal and work-related trips?

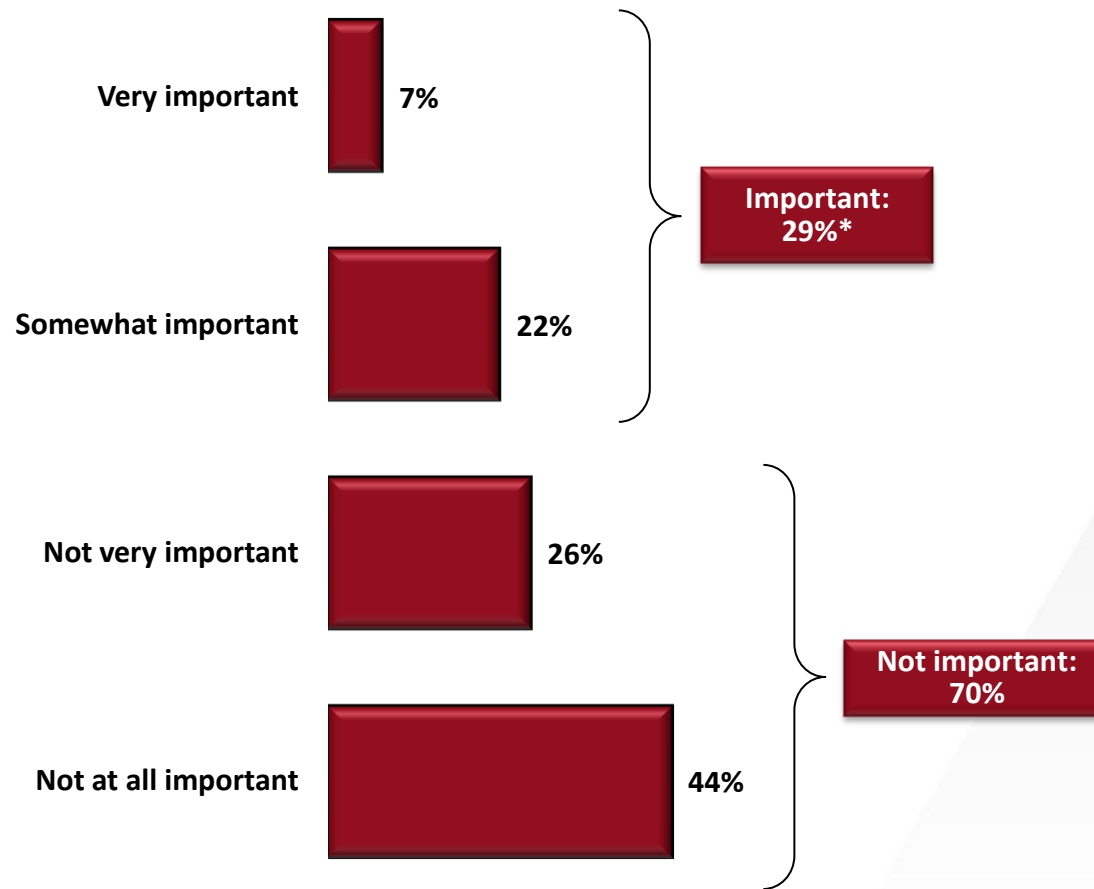
Base: CarShare Users (n=89)

***Rounding**



CarShare - Non-Users

Importance of CarShare in your Neighbourhood



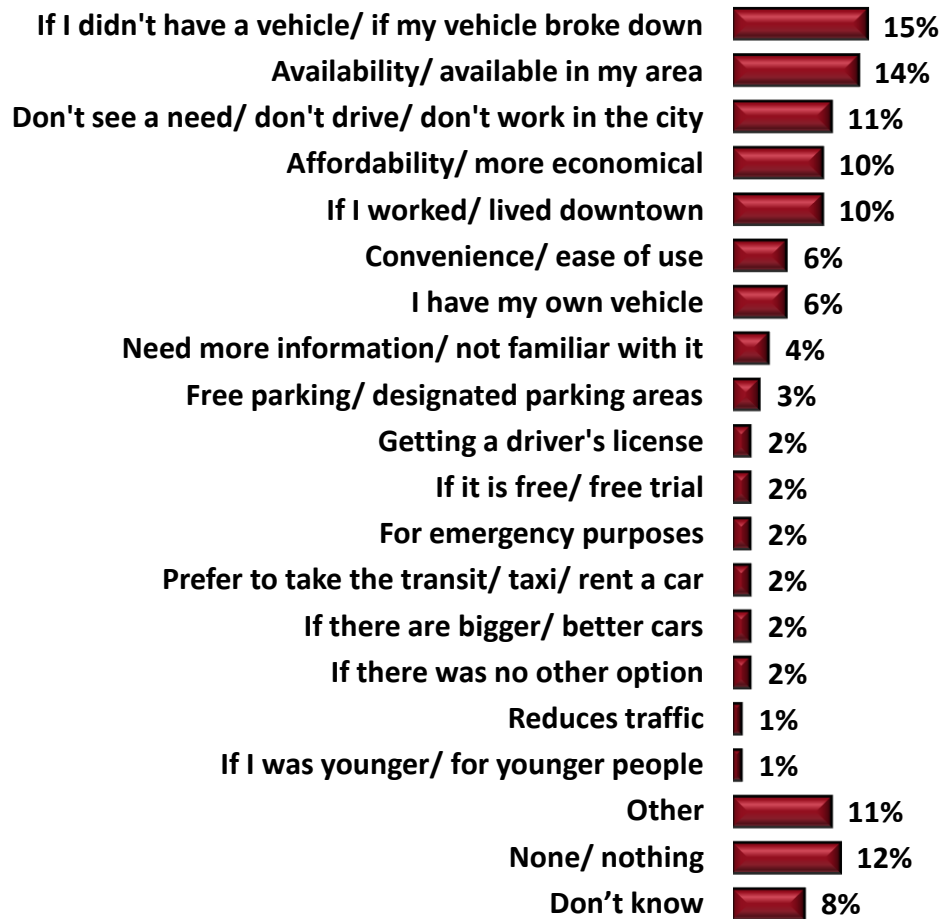
Q15. If you were considering the purchase of a new house or condo, how important would having CarShare vehicles in your neighbourhood or building be to you personally?

Base: CarShare - Non-Users (n=709)

***Rounding**

Encouraging CarShare Use (among non-users)

Multiple Mentions



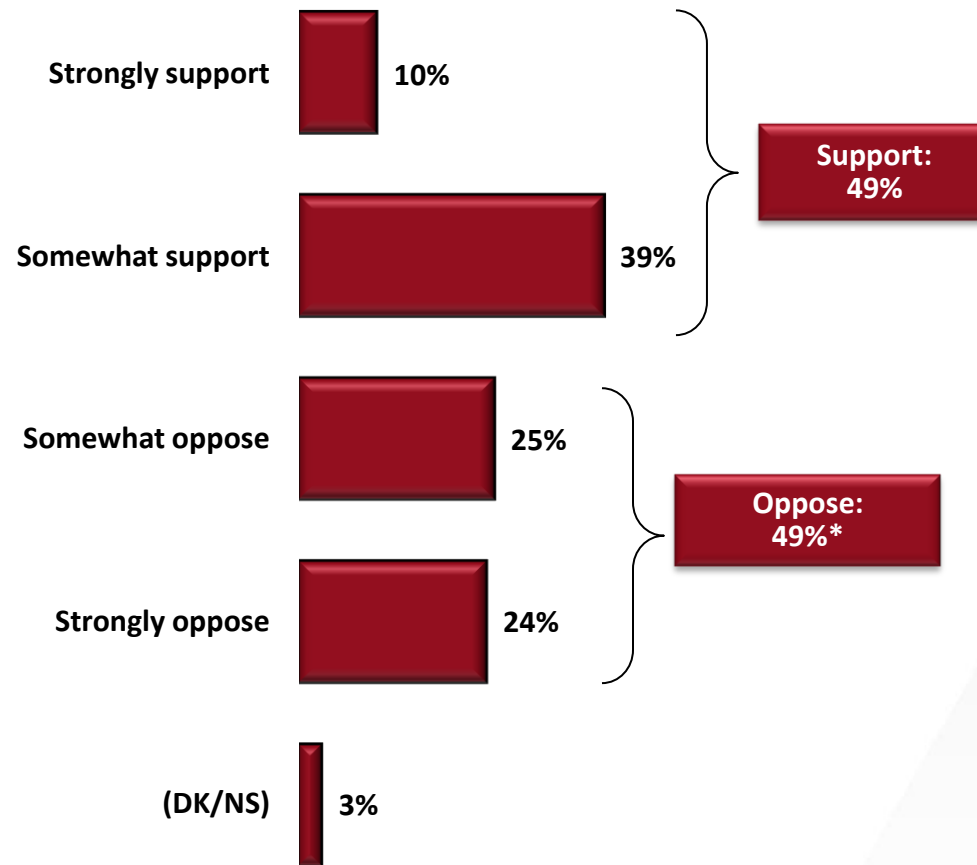
Q14. If you don't currently use it, what would encourage you to use a CarShare service?

Base: CarShare - Non-Users (n=709)



CarShare Policy Components

Support for Reducing Parking in New Residential Buildings (where CarShare Spots were provided)



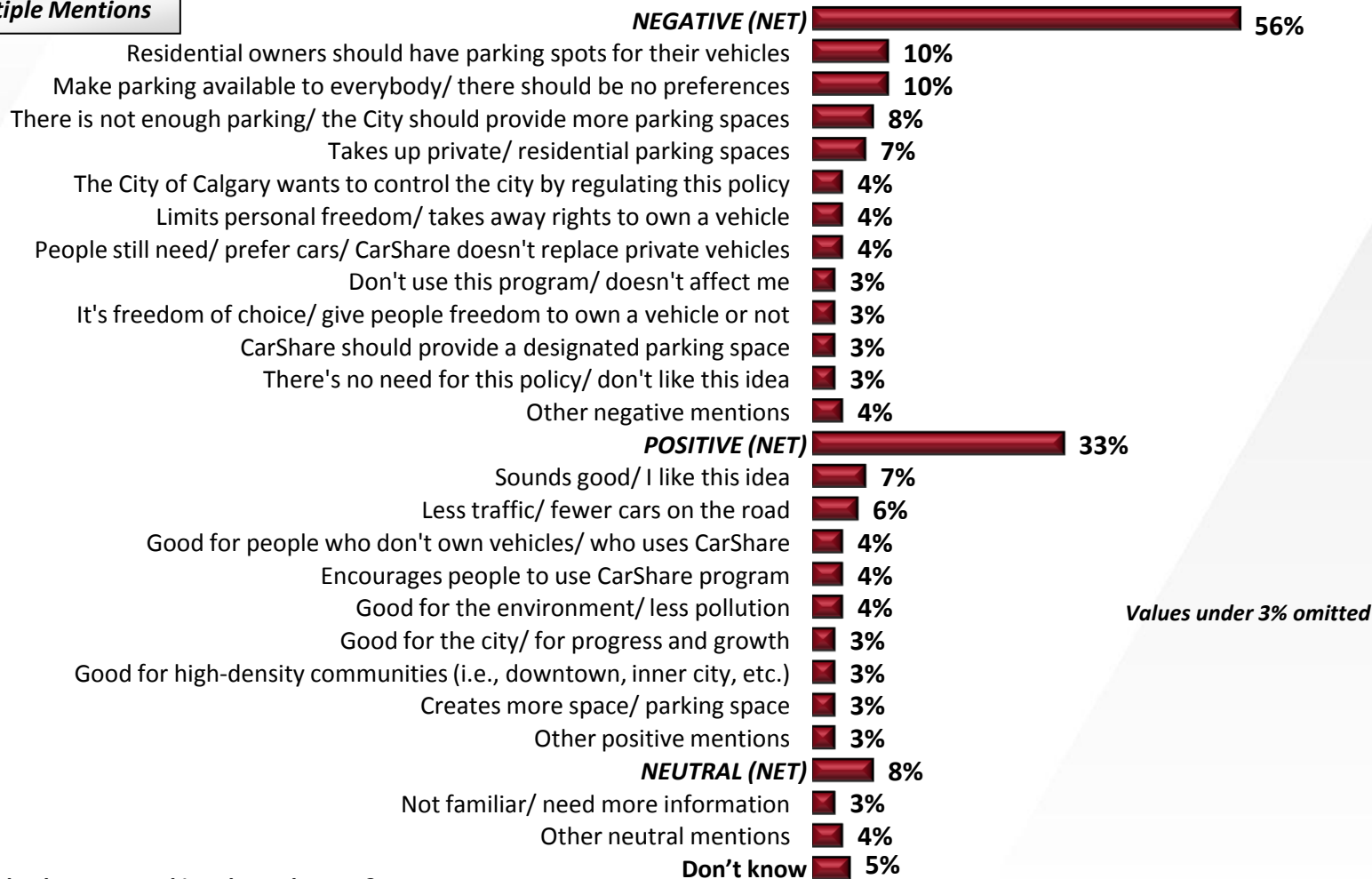
Q16. In some communities, municipalities have reduced the amount of parking required for new residential buildings when CarShare spaces were provided. Do you support or oppose The City of Calgary making these changes? Would that be somewhat or strongly?

Base: All Respondents (n=800)

***Rounding**

Reasons for Support or Opposition to Reducing Parking in New Residential Buildings (where CarShare Spots were provided)

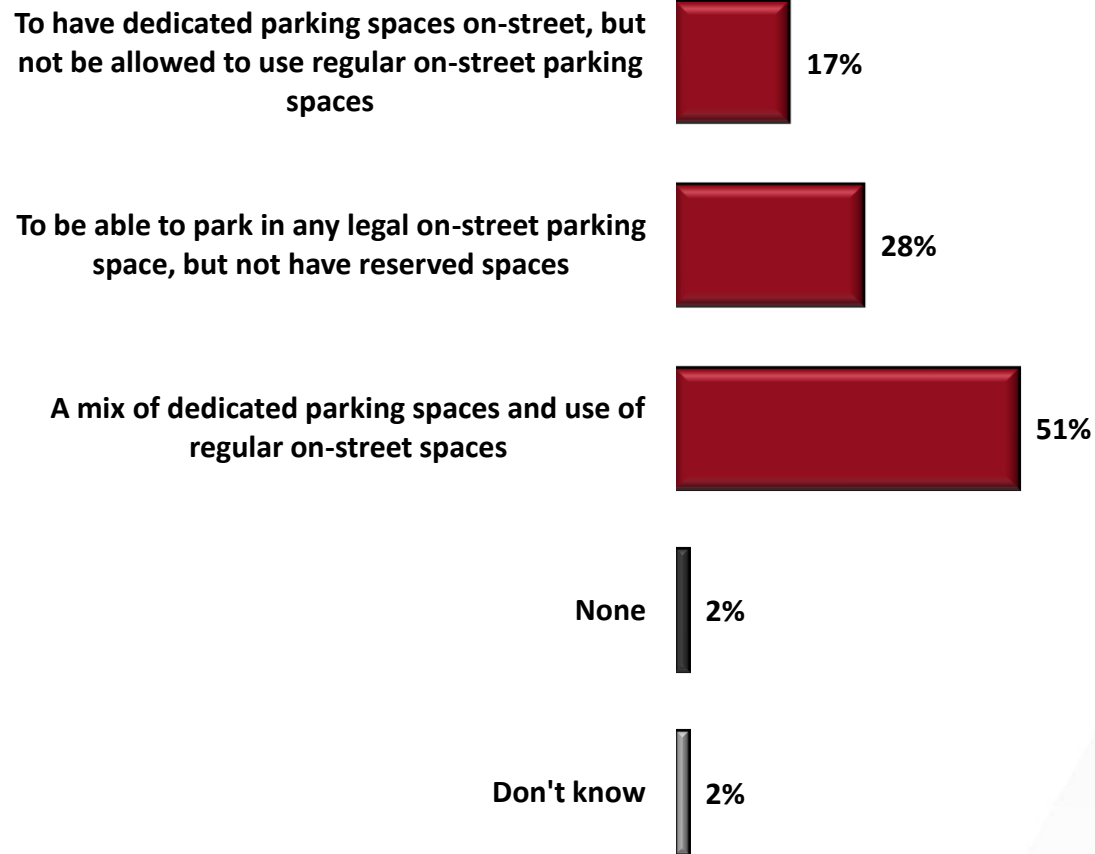
Multiple Mentions



Q17. Why do you ... making these changes?

Base: Those Who Have Support Or Oppose The City Of Calgary Making These Changes (n=778)

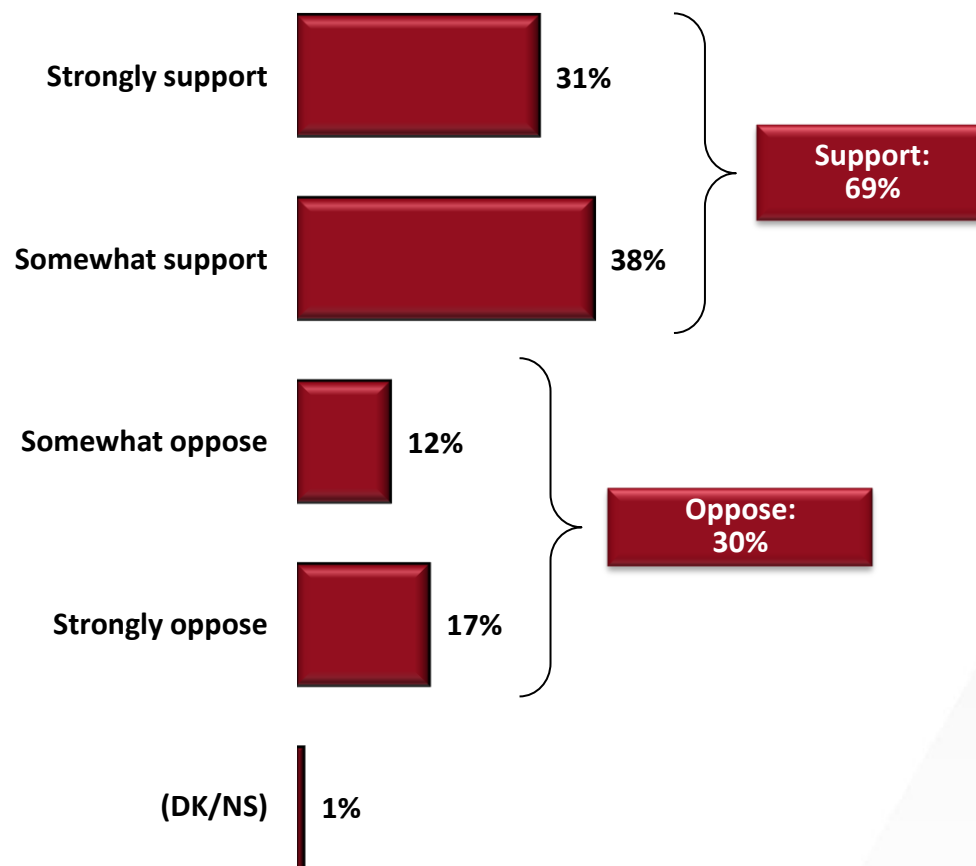
Preferred Parking Locations – CarShare Vehicles



Q18. The City of Calgary currently charges CarShare companies the going rate for parking in commercial areas, like downtown Calgary. Which of the following do you personally prefer as it relates to CarShare parking in commercial areas?

Base: All Respondents (n=800)

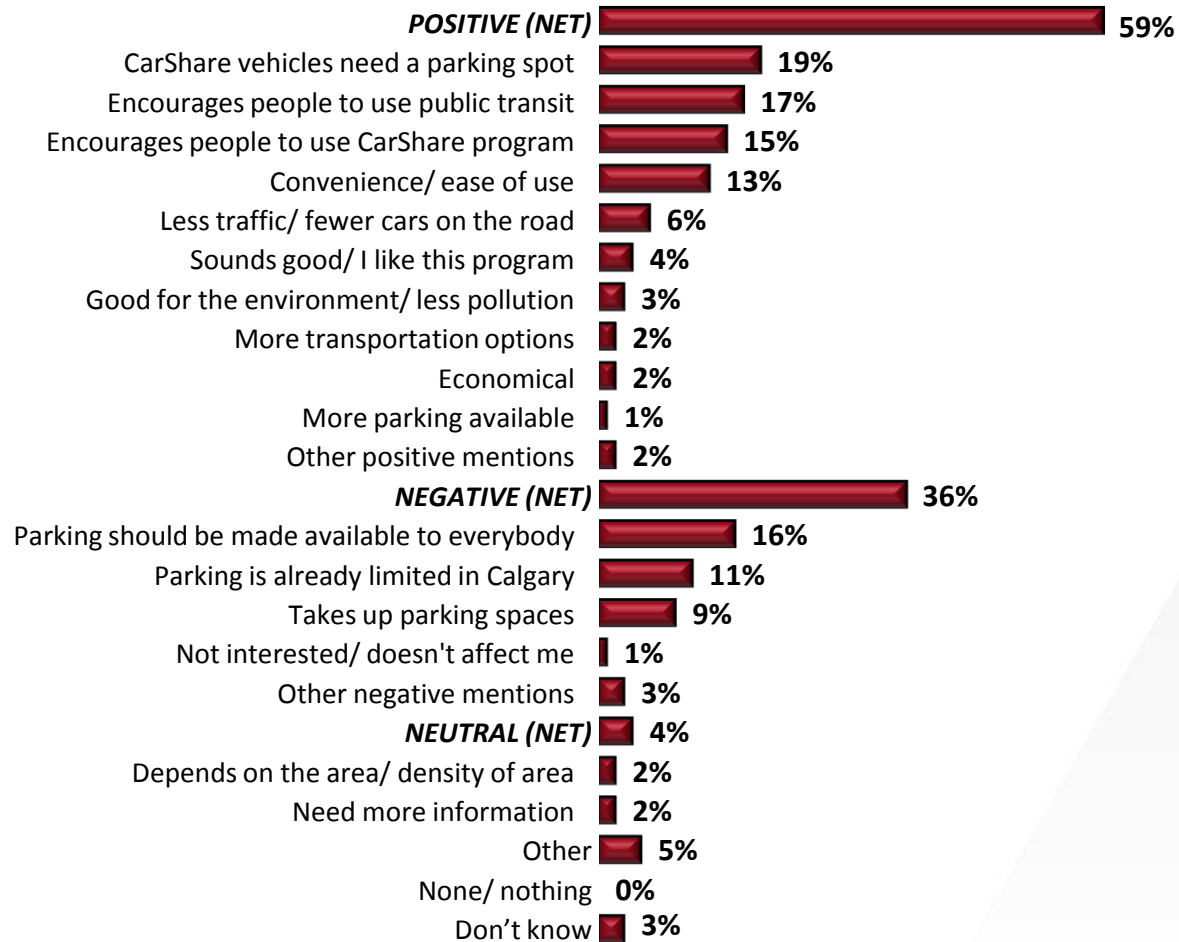
Support for Dedicated CarShare Stalls At Calgary Transit Park & Ride Lots



Q19. Thinking specifically about Calgary Transit Park and Ride lots, do you support or oppose the idea of providing a few dedicated stalls for CarShare vehicles?

Base: All Respondents (n=800)

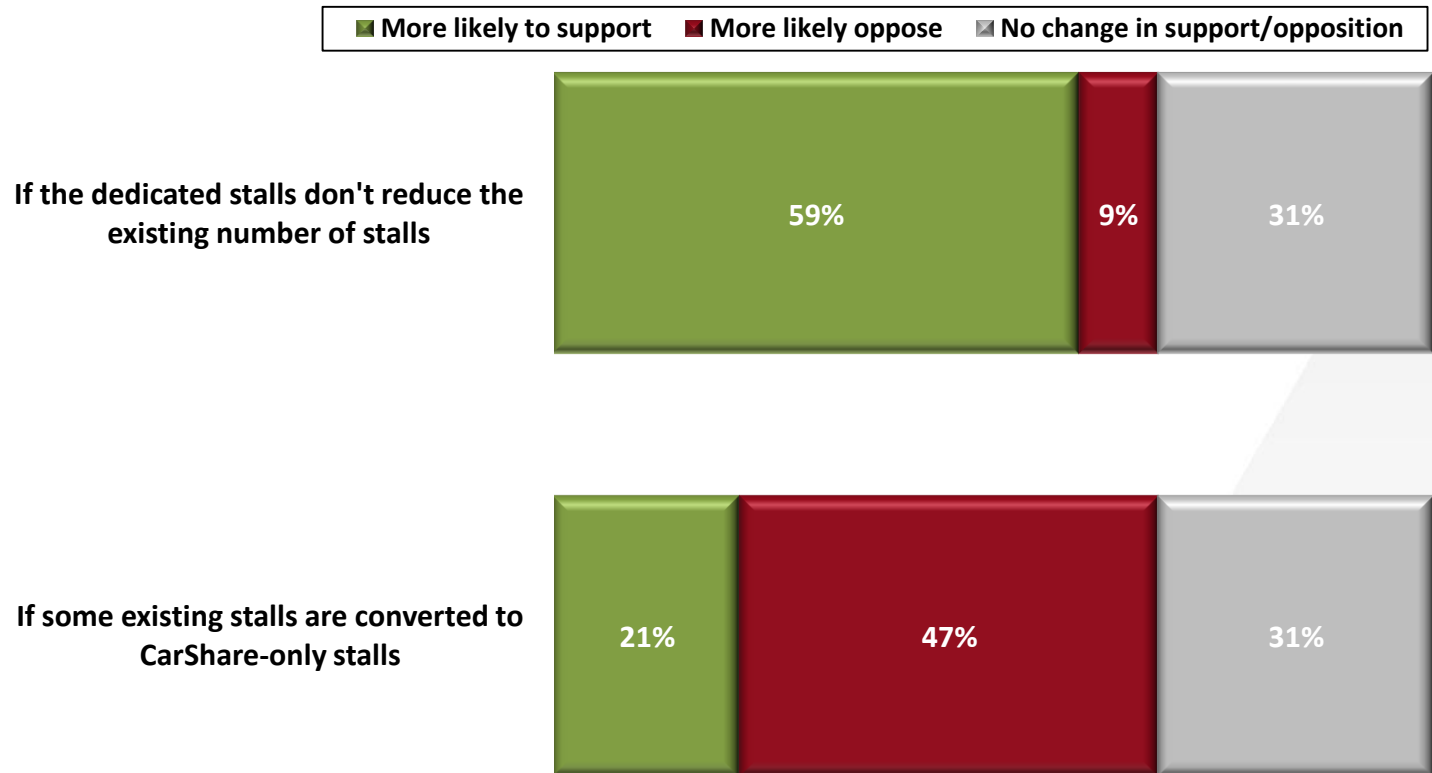
Reasons for Support or Opposition to Support Dedicated CarShare Stalls At Calgary Transit Park & Ride Lots



Q20. Why do you ... providing a few dedicated stalls for CarShare vehicles?

Base: Those Who Have Support Or Oppose The City Of Calgary Making These Changes (n=778)

Impact on Support for CarShare Stalls



Q21. Would you be more or less likely to support or oppose providing dedicated CarShare stalls in Calgary Transit Park and Ride lots...?

Base: All Respondents (n=800)



Demographics

Demographics

Gender

Male	49%
Female	51%

Age

18-34	32%
35-54	38%
55+	26%
<i>Mean</i>	<i>44 years</i>

Education

Completed high school or less	15%
Some post secondary or college diploma	34%
Completed university degree or post-grad degree	51%

Income

Less than 30,000	4%
\$30,000 to < 45,000	5%
\$45,000 to < 60,000	9%
\$60,000 to < 75,000	7%
\$75,000 to < 90,000	6%
\$90,000 to < 105,000	9%
\$105,000 to < 120,000	8%
\$120,000 to just under 135,000	6%
\$135,000 to just under 150,000	6%
\$150,000 and over	24%

Number of People In Household

1	14%
2	29%
3	17%
4	23%
5	11%
6 or more	4%

Children and Seniors in Household

Children	49%
Seniors	15%

Demographics

Tenure in Calgary

Less than 5 years	9%
5 to less than 10 years	15%
10 to less than 15 years	13%
15 to less than 20 years	12%
20 to less than 30 years	20%
30 to less than 40 years	14%
40 or more	18%
<i>Mean</i>	<i>24 years</i>

Voted in Last Municipal Election

Calgary	72%
Yes – Other City	2%
No	26%

Disability

Yes	11%
No	88%

Type of Home

Apartment	5%
Townhouse	7%
Condominium	7%
Single-detached house	70%
Duplex-attached house	7%
Another type of multi-dwelling unit	3%

Own or Rent

Own	81%
Rent	14%
Neither	3%
Other	1%

Responsible for Property Taxes

Yes	85%
No	15%

Demographics

Born in Canada

Yes	77%
No	23%

Age Left Country of Birth

Under 12	32%
12 to 17	8%
18 or older	59%

Base: Not born in Canada

Ethnic Background

Caucasian/ white	24%
British	16%
Canadian/ French Canadian	17%
Western European	10%
Southern or Eastern European	10%
East or Southeast Asian	7%
South Asian	6%
Central/ South American or Caribbean	2%
West Asian or Middle Eastern	1%
African	1%
Aboriginal/ First Nations/ Metis	1%
Other	5%

Visible Minority

Yes	17%
No	80%

Quadrant

Southwest	31%
Southeast	23%
Northwest	28%
Northeast	20%