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Measure Evaluation Results

UTR 6.2 Car sharing

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Executive Summary

The Car Sharing measure aims at giving an incentive to the car users of Utrecht for sharing cars. Since September 2010, a **Car Sharing Campaign** - 'Utrecht deelt' - has been implemented in order to **raise awareness** of car users for the benefits of Car Sharing and **promote Car Sharing System** in Utrecht. The overall goal of the measure is to **raise the number of Car Sharing users** in Utrecht. Car Sharing is a sustainable transport mode which contributes to reduce negative environmental impacts, such as gas emission, and to enhance the quality of public space in the inner-city. The direct impacts of Car Sharing are the decrease of the average rate of private car ownership and the reduction of number of car trips in the city. This implies that the average of kilometres travelled by car tends to reduce compared to the total amount of kilometres travelled in the city. By using the Car Sharing system, the users are more aware of their own mobility behaviour. They usually mix different transport modes and can order a car according to their needs; the payment is made directly. Currently, four companies offer a fleet of commercial shared cars in Utrecht and two companies facilitate a Car Sharing System of private cars (one of which does both).

The measure was implemented through the following stages:

Stage 1: Research potential target population for car sharing (*September 2010 – June 2011*) - Research into the target groups was carried out by asking the inhabitants of the Province of Utrecht to complete online questionnaires. The main objective of the survey was to collect information on the potential development of Car Sharing system. The results provided the input for the development of a targeted campaign to promote car sharing.

Stage 2: Promotional campaign (*August 2011 - December 2012*) - The results of the research allowed the identification of neighbourhoods with high potential for car sharing implementation. Based on these results, a strategy has been developed for the campaign. However, due to the decision to use both a bottom-up approach and a top down communication, the scope of the campaign widened to the surrounding neighbourhoods (and the rest of the city) as well. Hence, although the campaign had its definite 'campaign neighbourhoods' (neighbourhoods that were more actively approached in the campaign than others), it could not be said that certain neighbourhoods had been completely bypassed by the campaigns' efforts. The campaign basically comprised a website to provide information on Car Sharing, a promotional flyer and several events.

Due to budget problems (finding public funding) the measure could only start at the beginning of 2010. The campaign was therefore delayed and started in June 2012 instead of August 2011. The campaign is foreseen to continue until December 2012. This implies that the impact evaluation is based on partial outcomes.

The evaluation strategy of this measure sought to focus on the number of Car Sharing users and on the degree of awareness among car users regarding Car Sharing system. A comparative analysis of these two indicators, measured before and after the campaign, allows concluding on the impact of the campaign on car users. Between June 2012 and August 2012, the number of car sharing members increased by 298. 13% of this growth (39 new members) could be directly linked to the campaign, as these members signed up through the campaign website.

One of the main **barriers** observed during the implementation process had been a disagreement between one of the Car Sharing providers and the other stakeholders involved regarding the special tariff proposed to the users in the frame of the campaign. The escalation of the conflict led to the postponement of the launch of the campaign. After negotiations, an agreement had been reached at the beginning of June 2012 and the measure could be implemented.

On the other hand, the cooperation between a communications agency and the host of a consumer platform contributed to the success of the implementation of the campaign and was identified as one **driver** in the process. This cooperation combined the promotional efforts and the strong bottom-up promotional strategy. Additionally, one of the Dutch car sharing companies, Greenwheels, worked on a pilot for the implementation of electric car sharing vehicles in Utrecht, Rotterdam, The Hague and Amsterdam. The results had no direct impact on the campaign but resulted in a wider range of shared cars, thus making the fleet more attractive.

During the implementation process of the measure, **recommendations** can be highlighted as key success factors. The first recommendation is to perform a context oriented analysis in the earliest stage of the process to identify focused areas and target groups to address an effective campaign. The second recommendation is to actively involve citizens in the campaign and to promote a bottom-up communication process. Car Sharing users are relevant actors in promoting Car Sharing in their neighbourhood and community. The public authorities are no longer the dominant driver; instead citizens should be integrated in the process as partners who contribute to raise acceptance of Car Sharing among car drivers. Additionally, the city needs to cooperate with all companies to ensure that the market competition is not negated. Hence the city should take a moderating function.

At the current stage of the process, the provisional extracted result is positive and allows forecasting an increase in the numbers of Car Sharing users at the end of the campaign. 75% of the activities are still in the implementation process and are foreseen to be accomplished the first half of 2013. At the end of the campaign, final results will be drawn and further recommendations will be formulated. Nonetheless, this first evidence shows that the combination of a consumer platform that promotes sustainable projects by bringing people together (bottom-up) in cooperation with a communication agency for designing the campaign lay-out (top-down), gave “the best of two worlds” to the city of Utrecht. The current impact evaluation of the Car Sharing campaign is very promising and the success of the measure demonstrates the potential of transferability of the measure to a larger area, such as the Province of Utrecht.

A Introduction

A1 Objectives

The measure objectives are the following:

High level objectives:

- Increase of modal split towards sustainable modes.

Strategic level objectives:

- Increase the variety of flexible alternatives for private car ownership.

Measure level specific objectives:

- To raise awareness of car sharing and remove prejudices concerning car sharing in Utrecht.
- To stimulate further growth in the usage of shared cars in Utrecht.

A2 Description

The city of Utrecht intends to increase the use of sustainable modes of transport, thereby reducing the environmental impact of travelling and improving the quality of public areas. A way to achieve this is by reducing private car ownership and the number of car trips. Car sharing helps accomplish these goals. As a result of the direct payment system based on usage, car sharers are more aware of their mobility behaviour. Generally car sharers try to mix their car usage with other transport modes. This causes an average reduction in kilometres travelled by car in respect to the total amount of kilometres travelled.

This measure aims to continue the growth in the use of shared cars. To achieve this, the measure was aimed at raising the awareness of car sharing. There are many people who are still unaware of the existence of car sharing. Providing them with this information will very likely increase the number of car sharers in the city. In addition to getting more people to consider car sharing as an alternative to car ownership, raising awareness of the concept will also help in reducing people's prejudices about car sharing, enabling increased acceptance of the concept in neighbourhoods where shared cars need to be placed in front of people's houses. Although car sharing could be a way to decrease the pressure coming from the lack of parking space in the city, it is not always viewed favourably by private car-owners. They often see the placement of a shared car in the neighbourhood as an *added pressure* to the existing parking problem in their neighbourhood. It's a challenge to convince these inhabitants of the benefits of car sharing.

Basically there are two different types of car sharing:

- Private/informal car sharing: two or more different households share a car. This can be arranged informally, but there are special insurance arrangements for these informal car sharers and even contracts that arrange the splitting of costs and time spent using the car. If these different households live in a part of the city with paid parking, the city can provide separate parking permits for the different households. This is especially the case when the users reside in different parts of the city and thus reside in different parking permit regions.
- Commercial car sharing: car sharers use (a) car(s) provided by one of the professional car sharing agencies which have built up a network of shared cars spread over specific

neighbourhoods. They offer a public car sharing system with an online reservation system and access key cards for using the cars.

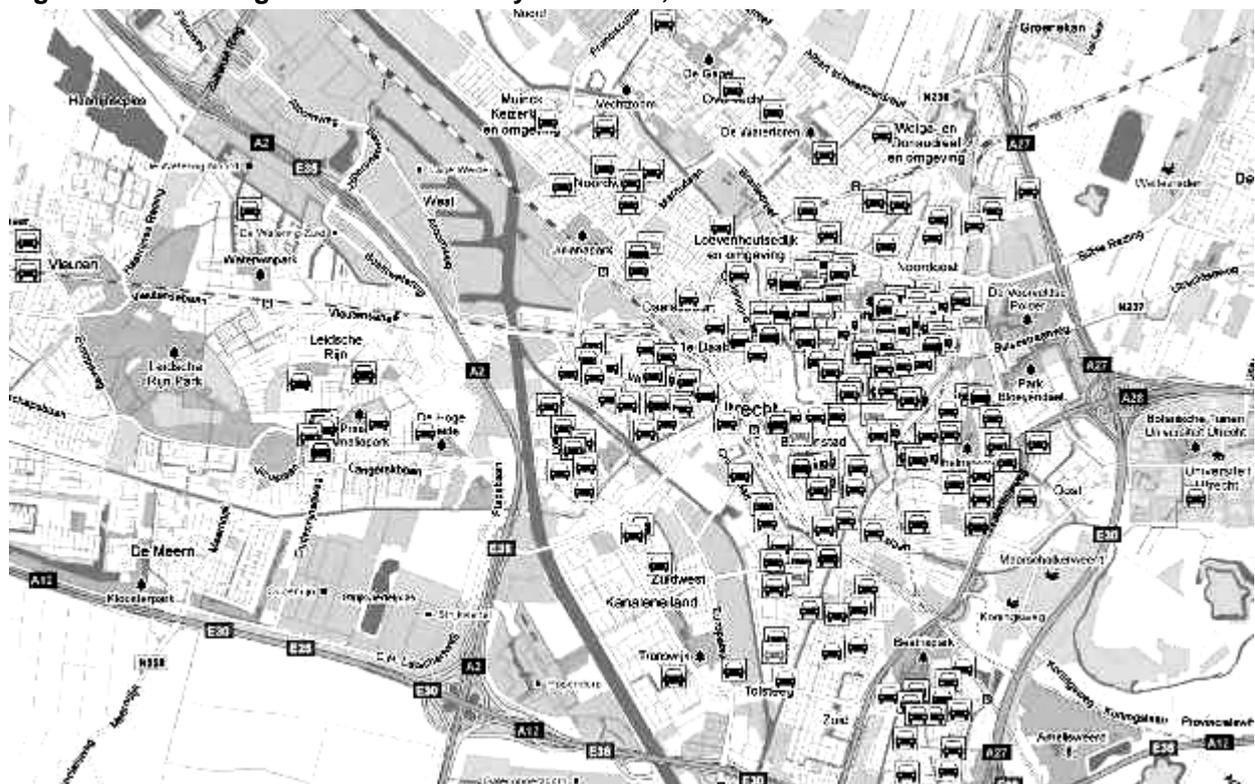
Car sharing can be economical compared to owning a private car for people who drive less than 10,000 km annually by car, according to the national Consumer Alliance (Consumentenbond, 2010). A car sharer can save up to € 300 - per month compared to using a similar privately owned car. Furthermore, members of commercial car sharing agencies enjoy many of the benefits that come with car sharing, such as the beneficial insurance arrangements, the lessened if not completely absent responsibility for a car and its maintenance expenses, and never having to look for a parking space in the city when coming back from a drive. Furthermore, on average, each shared vehicle replaces three to six privately owned vehicles (KVV, 2009).

In Utrecht, four companies offer a fleet of commercial shared cars and two facilitate private car sharing (one of which does both). A list of these companies and specifications of their market share and concepts can be found in section D.3.2.

The city of Utrecht facilitates the car sharing companies by providing relatively cheap reserved parking lots and parking permits for shared cars, both of which are paid for by the car sharing companies. These lots are separated from other parking places and are assigned to particular shared cars.

The map below (figure 1) shows the city of Utrecht including the car sharing locations in April 2011 (excl. private shared cars).

Figure 1 Car sharing locations in the city of Utrecht, 2012



Each icon represents one shared car location, with one or more cars at that location. These icons show the car fleets of Greenwheels, StudentCar, ConnectCar and MyWheels. Precise numbers of cars and members for each of the companies offering shared cars in Utrecht at the start of the campaign can be found in section B3.

The Association for Shared Car usage (translated; Vereniging voor Gedeeld Autogebruik [VvGA]) has records for 137 households in Utrecht and 64 registered privately shared cars. These are not portrayed on the map. Because private car sharers don't necessarily need to register this with the municipality or with the VvGA, there is no complete overview of the number of informal shared cars and the number of informal car sharers in the city. It is however safe to assume that the group is much larger than those 137 households and 64 shared cars.

The commercial shared cars are mainly concentrated in dense 19th-century neighbourhoods in and around the city-centre where there's paid parking, a lack of parking spaces and waiting lists for the existing ones are long.

Some groups and neighbourhoods will offer more potential for car sharing than others. It was thought beforehand that a new market for car sharing might, for instance, be found in the suburban residential areas, where shared cars have the potential to reduce the growing number of second cars of inhabitants. At the same time, it was thought that there might be a large user group within the already exploited 19th century neighbourhoods near the city centre who have yet to discover the benefits of car sharing.

A thorough investigation of the opportunities for car sharing was implemented in this measure so as to pinpoint these potential user groups and find out more about their situation and perspectives on cars and society. This research also focused on the prejudices about car sharing that persist amongst these groups. The outcome of the research helped achieve a more targeted way of communicating the benefits of car sharing and to disprove prejudices. It also proved that some neighbourhoods had greater potential for early adopters to car sharing than others.

At the end of 2008 several car-sharing companies expressed their willingness to work together with the City of Utrecht to promote car-sharing in the city of Utrecht and participate in the organisation and evaluation of this measure. In line with this, this measure comprises the implementation of a specific car-sharing promotional campaign aimed at a number of selected neighbourhoods. Depending on the results of this campaign, the market in turn may expand the number of shared cars in the city.

If the measure is successful, the campaign might be extended to other areas in the province of Utrecht, which are not part of the current measure.

B Measure Implementation

B1 Innovative aspects

- **New conceptual approach** – The municipal government previously only facilitated car sharing. In this measure, the city actively approached people and tried to stimulate car sharing.
- **Targeting specific user groups** – Based on explorative research amongst the city's citizens, a specific group of potential users was approached. This group was approached by targeting the neighbourhoods which, according to SmartAgent (the company that was involved in doing research on this subject), hold the highest percentages of potential users.
- **Other - New market approach** – A relatively experimental bottom-up approach was used for the promotional aspect of this campaign. Nudge is an independent organisation which facilitates and uses an environmentally friendly consumer platform to support and promote sustainable initiatives and projects by bringing people together. This platform is comprised of

'Nudgers' the people who signed up to this platform and together form a large network of so called 'neighbourhood mayors', working bottom-up for a more sustainable society. This network was put to use for this campaign.

B2 Research and Technology Development

The following research and technology activities have taken place:

A market study and marketing research regarding the **potential population** for car sharing in the city of Utrecht was carried out. The research resulted in deliverable UTR 6.2.2. The research showed the following:

Research was conducted among the inhabitants of the Province of Utrecht employing an online questionnaire. A total of 1,040 inhabitants owning a driver's license responded. Participants were all members of Panelclix, an organisation with a panel of people who regularly participate in surveys. They were picked so that the group would be representative of the province's population when it comes to age, household type, degree of urbanisation and level of education. Another 453 current car sharers, randomly approached through the member databases of several of the car sharing companies (Greenwheels, MyWheels, StudentCar and the VvGA), also responded to the survey.

The main objective of the survey was to gain a better perspective on potential car sharers. How many people can be classified as such? What are their motives and reservations? And can these people be divided into clear separate target groups for the stimulation campaign? The survey also led to an estimation of the structural effects of car sharing on car use and car ownership.

A quantitative online survey was carried out, leading to a segmentation model with results divided by region, age, life phase, level of education and values. The outcomes were then translated into results at the neighbourhood and postal code level. The results were then used for a cluster analysis that classifies people based on certain properties, like household characteristics and values that are considered important. These results are then input for a targeted campaign to create support for car sharing.

Some draft results regarding the citizens of the Province of Utrecht were:

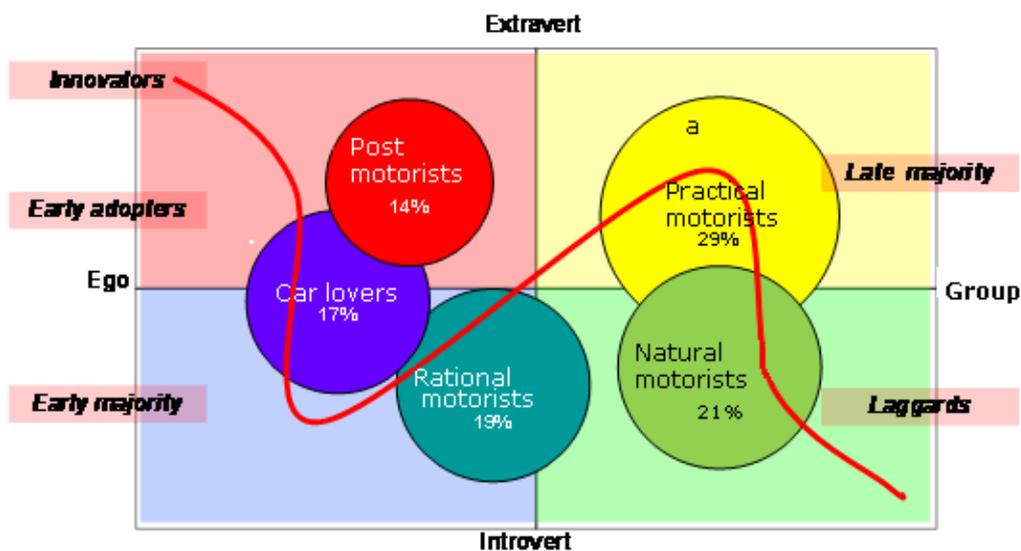
- 57% of the respondents already know the term 'car sharing'.
- 6% of the respondents are already actively car sharing, 10% consider car sharing attractive and 25% are neutral.
- Car sharing is most often associated with the words 'carpooling', 'together', 'cheaper', 'sharing' and 'Greenwheels'.
- People who are not yet involved in car sharing think that car sharing:
 - would lead to lower costs (compared to having a privately owned car);
 - would lead to driving no more kilometres than necessary and;
 - is cheaper than regular car rental.

With the results from the question about lifestyles respondents can be split up into five groups:

- Post ('late')-motorists: 14%
Not attached to a car. Progressive people who could be persuaded to share one.

- Practical motorists: 29%
Attached to their own car. There is sympathy about the idea of car sharing, but adapting would only be possible if the concept was wide spread.
- Natural motorists: 21%
Attached to their own car and fairly conservative.
- Rational motorists 19%
Not attracted to their car, but they don't know how it could be possible to live without it. Potentials for car sharing.
- Car lovers 17%
Driving a car is part of their identity. Getting them to adapt to car sharing is a matter of changing its image, thereby making it more attractive.

Figure 2 Lifestyle groups, as identified in the SmartAgent research



In general, people who are interested in car sharing or are already actively car sharing are often women, citizens under 25, students, and have a relatively left political orientation. The following lessons were learned from the research:

- There are various reasons why car sharing is becoming more popular: increasing environmental awareness, practical need for an occasional car, financial advantages.
- Predictions are that a shared car, when used to travel 5 to 10,000 km a year, can financially save the user around 100-300 euro a month, compared to a comparable 'owned' car.
- Car sharing cars are generally a maximum of 3 years old, and therefore often safer, more economical and more environmentally friendly than older cars.
- Car sharing is not only popular in urban areas but also in smaller municipalities. There does not seem to be a connection between how 'urbanised' one's living area is and the attractiveness of car sharing, nor does the type of household (family, single, couple etc) seem relevant.
- When asked, 18% prefer sharing a car through a car sharing organisation, over sharing a car with friends or acquaintances (11%). However, 64% of the people who currently

share a car are doing this by sharing it with friends, neighbours or relatives. Only 8% use an organisation like Green Wheels; 28% use car sharing 'in a different way'.

- Car sharers use the car mostly for groceries, visiting friends and family and transporting heavy goods.
- Car sharing can also have a downside: people who use car sharing say that driving a shared car decreases their use of bicycle (38%), bus (32%) and train (30%).

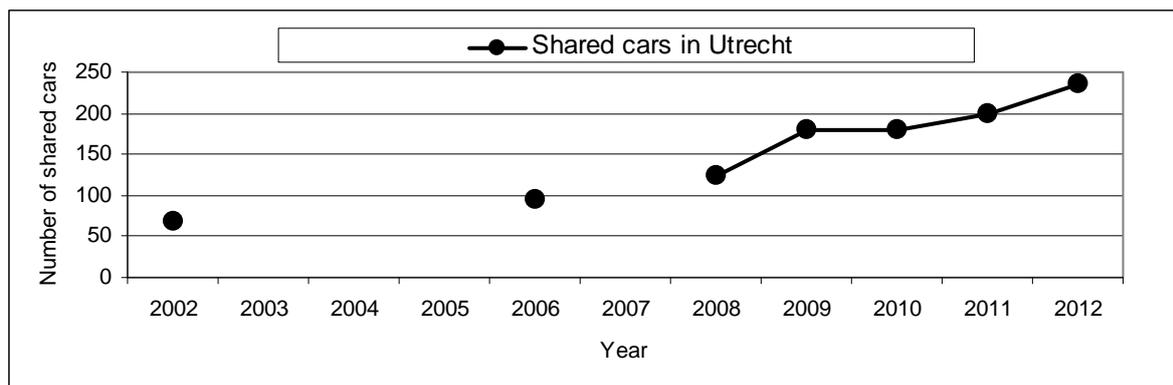
The research revealed more characteristics and provided good input for the further implementation of a promotional campaign on a selected part of the inhabitants of the city of Utrecht. It also revealed in which parts of the city these early adopters are most likely to be found. These neighbourhoods should be targeted by the campaign and are found within the city centre and the immediate surroundings. The highly suburban areas were found to have a lot less potential.

B3 Situation before CIVITAS

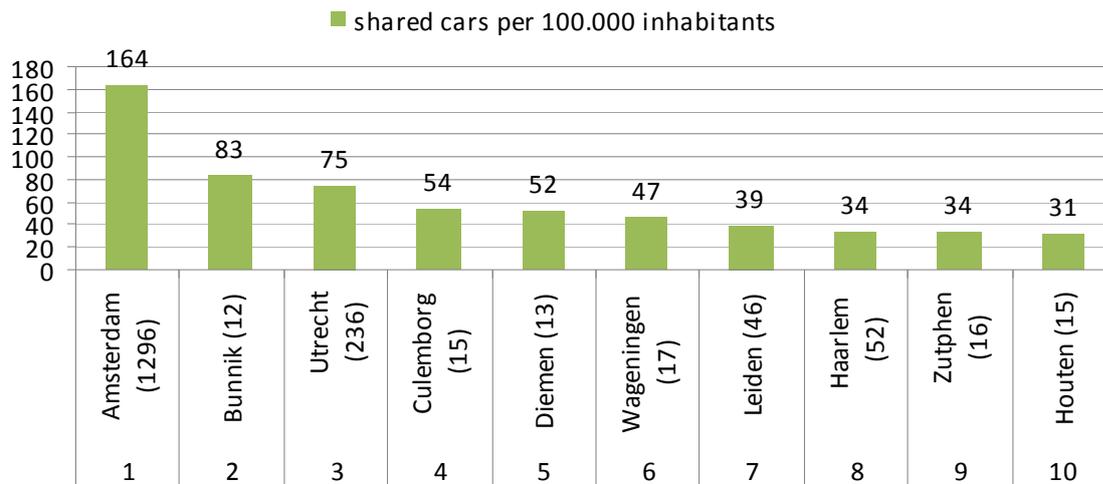
The car-sharing concept was clearly gaining momentum at the beginning of CIVITAS MIMOSA and before the start of the campaign. An evaluation by Kennisplatform Verkeer en Vervoer [KpVV] in 2012 shows historical trends.

In March 2012 an evaluation of the progression of car sharing in the Netherlands was performed by Kennisplatform Verkeer en Vervoer [KpVV] (just before the launch of the campaign in Utrecht). This evaluation showed that the growth in shared cars in the city of Utrecht started before CIVITAS MIMOSA and has been rapidly increasing since 2008 (figure 3). Between the years 2011 and 2012 one can see a definite upward trend in car sharing, with a rise of 25% in shared cars. It is expected by the KpVV (2012) that this number will continue to increase exponentially in the coming years.

Figure 3 Shared cars in Utrecht until March 2012 (incl. years with missing data)



Compared to the rest of the Netherlands, Utrecht (and Bunnik as a neighbour municipality) is a frontrunner. In March 2012, there was an availability of about 75 shared cars per 100,000 inhabitants in the city of Utrecht. Utrecht ranks third on the list of top 10 car sharing municipalities, right after Amsterdam (1) and Bunnik (2), as can be viewed below (figure 4).

Figure 4 Top 10 car sharing municipalities in The Netherlands (in brackets: no. of available shared cars), 2012

Source: KpVV, 2012

Prior to 2008, the city of Utrecht had already facilitated car sharing initiatives by supplying reserved parking spaces and parking permits for shared cars, both of which are paid for by the car sharing companies. However the city of Utrecht wants to stimulate even more growth. Therefore in cooperation with the different car sharing companies in the city of Utrecht a campaign was developed to stimulate car sharing.

B4 Actual implementation of the measure

The measure was implemented in the following stages:

Stage 1: Research potential target population for car sharing (September 2010 – June 2011) - Research into the target groups has been carried out using online questionnaires completed by inhabitants of the Province of Utrecht. The main objective of the survey was to gain a better perspective on potential car sharers. A quantitative online survey was carried out, leading to a segmentation model with results divided by region, age, life phase, level of education and values. The outcomes were then translated into results at the neighbourhood and postal code level. The results were then used for a cluster analysis that classifies people based on certain properties, like household characteristics and values that are considered important. More results can be found in the research and technology part of this report B2. The results were the input for the development of a targeted campaign to create support for car sharing.

Stage 2: Promotional campaign (August 2011 - December 2012) - The results of the research were used to select neighbourhoods that have a high potential for growth in car sharing. This was taken into account when developing the campaign. Following the tendering process two agencies remained: a marketing agency called Emotion (www.emotion.nl) and the networking organisation, Nudge (www.nudge.nl). As they both had an interesting approach it was decided to let them develop and implement a campaign in cooperation. The campaign consists of both a top down communication campaign and a bottom up approach through the Nudge network. In the 'target' neighbourhoods the bottom up approach is applied. However these neighbourhoods are not the only places where potential car sharers live. The 'top down' communication campaign is launched city-wide with some extras in specific neighbourhoods.

In the months leading up to the campaign launch on June 2nd 2012, a lot of work was put into clarifying the exact form of the campaign. On the 27th of March, a creative session was organised to bring people from Nudge, Emotion, car sharing agencies, politicians, the

municipality of Utrecht and local car sharers together in order to brainstorm and discuss the content of the campaign. Most of the car sharing agencies were present, and the day proved to be very fruitful. It wasn't long after this that the main ideas on promotional measures and lay out of the campaign were established (see figure 5).

Figure 5 Campaign flyer and promotional event for car sharing



The promotional efforts put into use during the campaign were the following:

- **An informative website (www.utrechtdeelt.nl)**, offering information on car sharing in general as well as more specific information on car sharing in Utrecht. This also includes information on the different car sharing agencies operating in the city and the deals they offer the inhabitants of Utrecht in light of this campaign. People can sign up for membership of one of these agencies through this website as well.
- **A promotional flyer** (figure 5) was distributed through several channels to communicate the advantages of car sharing and promote the website. These were distributed during the launch day of the campaign; handed out by Nudgers at several neighbourhood events; added to the 'welcome package' provided by the municipality of Utrecht to new inhabitants of the city (people who are in the middle of a large adjustment in their lives, are more prone than others to re-evaluate their mobility choices); and mailed to people on the waiting list for parking permits and current parking permit holders.
- **Several promotional events**, the most important of which; the launch day on June 2nd 2012. On this day an entire procession of shared cars drove from square to square in the city of Utrecht, accompanied by a musical spectacle provided by one of the local Samba percussion bands, Nudgers from all over the city and others involved in the organisation of the campaign (see figure 5). People on the street were actively approached, providing them with verbal explanations and promotional material on car sharing and leaving them to study the flyers and visit the website to try it out themselves.
- **Other efforts** were made as well. Two important ones were:
 - **Congruence within city policy and campaigns** — To optimise the success and scope of the campaign, colleagues within the municipality were informed about the aim and content of the campaign. This was done with two goals in mind; to convince colleagues within the municipality of the benefits of car sharing and get them to try it; and to convince them to insert car sharing into future policy and other campaigns. In a campaign to promote biking in the city for instance, car sharing was mentioned to support this multi-modal mobility choice.

- **Actively informing influential groups** – Several influential people and groups were actively informed about car sharing and the benefits it offers for both them and the city itself. Specifically housing corporations, real-estate agents and developers targeting young people were approached, so that they might incorporate car sharing in their building efforts and lobby with the municipality to be allowed to build less parking spaces as a result of the placement of shared cars. Because current city policy dictates specific parking quotas, it is hard to obtain exemptions from these quotas, even if shared cars are placed (thereby lessening the need for private cars and as many parking spaces). If a lot of these developers send letters asking for exemption from these quotas however, the city might be more inclined to honour these requests. All this obviously is not directly connected to the current aim of the measure, but is aimed more at future strides for car sharing.

The results of the campaign and the evaluation were used to proactively inform the car sharing companies so they can, depending on the extra interest generated in car sharing, increase their number of shared cars in specific neighbourhoods and take over the promotional efforts of this campaign with their own marketing measures.

B5 Inter-relationships with other measures

There is no interrelation with other Utrecht (CIVITAS MIMOSA) measures.

C Impact Evaluation Findings

C1 Measurement methodology

C1.1 Impacts and Indicators

This measure aimed at raising awareness and removing prejudices concerning car sharing and eventually increasing the amount of car sharers and shared cars in the city of Utrecht. These results should be achieved by a campaign to make Utrecht citizens more aware of car sharing and the benefits of it. Assessing the impact of this measure means assessing the impact of the campaign. Therefore information was collected about car sharers and car share awareness before and after the campaign. It should be mentioned that unfortunately implementing the campaign took more time than expected and it only started on the 2nd of June 2012 and will continue until December 2012. This means that results are evaluated only three months after the campaign has started and not all results of the measure have been effectuated.

To measure the impact of this campaign, the indicators in table 1 are used:

Utrecht no.	Pointer no.	Category	Impact	Evaluation Indicator	Source
1		Transport	Number of car sharers	Number of car sharing members	Numbers from car sharing companies collected by the department of traffic of the city of Utrecht
2		Transport	Usage of shared cars	Number of available (commercial) shared cars in the city	Numbers from car sharing companies collected by the department of traffic of the city of Utrecht
3	13	Society	Car sharing awareness	The awareness level of Utrecht residents on car sharing	Panel of residents city of Utrecht
4	14	Society	Car sharing acceptance	The acceptance level of Utrecht residents on car sharing	Panel of residents city of Utrecht
5		Society	Campaign awareness	The number of visits on the campaign website	Website, Campaign agency

Detailed description of the indicator methodologies:

- Number of car sharing members-** The number of members of the commercial car sharing companies, as well as the number of members of the VvGA will be monitored, to see how these numbers compare to previous growth rates.
 The growth in the number of members is specified to new members through the campaign website and via other ways. This gives an indication of the impact of the campaign, however it is also possible that people who see the campaign become members through other means, so it is not possible to draw conclusions on these numbers.
- Usage of shared cars** – Each shared car that is placed in the city by one of the commercial car sharing companies needs a certain occupancy rate in order to be profitable. Two things

influence this occupancy rate: the number of subscribers that use the vehicle and the use they make of the car. One can imagine that four households that often use a car can create as high an occupancy rate for the shared car as twenty households that rarely make use of it. It goes without saying that each extra shared car that is placed in the city over the course of the campaign is a positive addition, and most likely replaces a number of privately owned cars and also reduces the amount of kilometres travelled by car. It therefore makes sense that for the evaluation of this measure, known car sharing households and the number of cars in operation before and after the campaign are compared, taking into account the expected growth rate for these numbers. This can be obtained by comparing these growth rates to previous years.

The number of shared cars was obtained from the car sharing companies by the department of traffic. These numbers are reported before and after the marketing campaign.

Important to mention is that it was not expected to see a significant increase in the percentages over such a short period of time. Many of the results from this campaign in general are expected to happen over a longer period of time. This is due to the fact that car ownership and usage do not change overnight; people need time to consider their options. It also takes time before the resulting growth in demand leads to a growth in supply. For the number of shared cars the city of Utrecht considers this evaluation as a baseline for further growth in the future.

- **The awareness and acceptance level of car sharing among residents of the city of Utrecht-** A pre- and post-campaign survey was carried out amongst a selection of the city's citizens to determine their experience with and knowledge of car sharing, which will help in determining the scope and success of the measure.

To measure the awareness of car sharing, members of the Utrecht residents panel (Bewonerspanel) were asked some questions about their awareness of car sharing. This panel is a group of residents that voluntarily fills in questionnaires, which are designed by the city of Utrecht, four times a year (department of research). This 'Bewonerspanel' has about 4,500 members, of which 50% respond on average. Questions about car sharing were asked before (autumn 2011) and after the implementation of the campaign (autumn 2012) to measure if awareness had increased.

The following questions were asked to measure awareness:

1. *Which of the following definitions do you think is car sharing?*
 - a) Driving together with a family member, fellow college student or other acquaintance in one car to the same destination.
 - b) The usage of one or more cars by different people from different households.
 - c) Using a taxi.
 - d) Sharing a car with different members of one household.
 - e) Renting a car.
 - f) Using one or more cars through a membership with an organisation.
 - g) Different.
 - h) I don't know.
2. *Do you think car sharing is an attractive alternative? (scale from 1 to 5 from very attractive to very unattractive)*

In measuring awareness it is assumed that the development of knowledge about the right definitions of car sharing is an indication of this. Therefore a selection was made: the group that knew the right definition (answer b and f) and the group that didn't (the rest).

To measure acceptance the rate of attractiveness of car sharing was used, assuming attractiveness is a good indicator for acceptance.

Both indicators were measured by the department of Research and Statistics (Bestuursinformatie) and the department of Traffic and Transport of the city of Utrecht.

- **Care sharing campaign awareness-** Another way to evaluate this measure and the awareness is by looking at the number of website visits on www.utrechtdeelt.nl, to see how many people this website has reached and how many people were educated on the concept of car sharing because of its existence. These numbers were collected from the website.

Some indicators have changed compared to the original local evaluation plan; in C5 Appraisal of evaluation approach these changes are explained.

C1.2 Establishing a baseline

The baseline for this measure is the situation before the implementation of the promotional campaign and the bottom-up scheme, so before June 2012.

Number of users and number of shared cars

Just before the start of the campaign the car sharing companies were asked to give information about the number of household members and the number of shared cars they have in the city of Utrecht. The number of informal shared cars that are registered with the VvGA in the city of Utrecht amounts to 64 cars, with 137 families registered as car sharers. Because not all informal cars are registered, it is assumed that these numbers are much higher in reality. Excluding these informal shared cars, and looking only at commercial shared cars, the fleet in June of 2012 amounts to 216 cars. This is slightly lower than the March 2012 numbers reported by the KpVV (2012) (see section B3). This is probably due to the fact that the SnappCar (a car sharing organisation) cars were included in the fleet. For this evaluation it was decided to leave all private cars out, because these cars are not a permanent addition to the shared car fleet in Utrecht; families can for instance decide to offer their cars for car sharing only during the summer, when they need them less.

The total number of car sharing members and total number of shared cars in the city of Utrecht from car sharing companies before the start of the campaign were taken as baseline. For the years before, only the number of cars was available and not the number of members. As the number of cars depends on the number of members it can be assumed that the number of members follows more or less the same trend as the number of cars. Another assumption made is that the cars/members ratio will be more or less the same each year. In 2012 there were 2,877 members and 216 cars available in Utrecht; this makes an average of 13 members per car. To estimate the number of available commercial cars per year in the past the trend of KpVV (see B3) was used and the baseline number of available commercial shared cars (216).

The awareness and acceptance level of car sharing among residents of the city of Utrecht

For the baseline in awareness and acceptance of car sharing in the city of Utrecht, the results of a questionnaire among the Utrecht residents panel in October 2011 were used. For this

questionnaire 2,146 panel members were invited to participate, 994 panel members responded (46%).

For the car sharing awareness campaign there is no baseline as before the campaign there wasn't a campaign website and website visitors.

C1.3 Building the business-as-usual scenario

The business-as-usual scenario for car sharing membership and the number of shared cars are the developments without the campaign. It was expected that car sharing membership and usage would also increase without the campaign, as it did in the previous years.

As the car sharing companies registered the number of members before and after the campaign and the number of members registered through the campaign website, these numbers were used to report the BaU. In total 39 of the 298 new members registered through the website, this makes a BaU of 259 members.

It should be noted that this is a minimum impact. As it assumes that people who noticed the campaign only registered through the campaign website, while it is also possible that they registered directly at the car sharing company. Furthermore as the campaign has a bottom-up approach, awareness could also appear without directly noticing the campaign website, as the Nudge network doesn't always need to use the campaign flyers. Attention is also drawn to car sharing through word of mouth.

For awareness and acceptance of car sharing the business-as-usual scenario is the development of awareness and acceptance without noticing the campaign. As the campaign was launched city-wide, it was not possible to select a certain area or group of residents that didn't see the campaign and use this as a control group (as planned before the campaign was designed). Therefore an extra question was included in the post campaign measurement of the residents' panel: the campaign flyer was shown and respondents reported whether they knew or had seen the campaign. For the BaU the outcomes of the residents that did not report noticing the campaign were used. In total 7% of responding panel members did notice the car sharing campaign.

It should be mentioned however that the campaign does not solely involve flyers and posters but, as previously said, also includes other elements like word of mouth. This means that panel members could be influenced by the campaign without noticing the flyer.

For car sharing campaign awareness the BaU is zero, as without campaign there wouldn't be a campaign website or visitors to it.

C2 Measure results

The results are presented under sub headings corresponding to the policy areas to which the indicators are related – economy, energy, environment, transport and society. For each area the indicators are reported in tables and graphs.

As mentioned earlier the campaign for car sharing only started in June 2012, therefore measured impact results are minimal. In 2013 when the campaign has ended, results should be measured again to see the complete impact. Here the available numbers for the impact during the first three months of campaign are reported. It is expected that the impact of this measure will continue and grow after the CIVITAS MIMOSA evaluation as the campaign has not yet ended.

C2.1 Economy

Not applicable

C2.2 Energy

Not applicable

C2.3 Environment

Not applicable

C2.4 Transport

The impact on transport consists of the number of available cars from commercial car sharing companies and the number of household members for car sharing.

Number of available cars and number of car sharing members

In June 2012, before the start of the campaign, there were in total 216 available commercial cars for 2,877 household members in Utrecht. Table 2 shows the numbers for each car sharing organisation.

Numbers for Utrecht	Car sharing households (members)	Shared cars
Greenwheels	2,373	185
MyWheels (Wheels4All)*	210	15
Studentcar	154	4
ConnectCar	140	12
Snappcar*	n/a	n/a
Total	2,877	216

* Only the commercial cars are counted in the case of MyWheels. The private cars as offered by their members for the use of car sharing are not taken into account. This is because these cars are not a permanent addition to the daily available fleet of shared cars in Utrecht. Families could for instance decide to only offer their cars for car sharing during the summer, when they need them less. The same goes for the SnappCar cars, these have not been taken into account in these numbers either.

The number of cars and members in the years before was estimated with the baseline numbers in 2012 and the trend of available cars reported by the KpVV. Table 3 shows the results of this estimation: there was already an increase in car sharing in the years before the launch of the campaign.

Utrecht no.	Pointer no.	Indicator	2009	2010	2011	June 2012
1		Number of car sharing members	2182	2194	2438	2877
2		Number of available (commercial) shared cars in the city	164	165	183	216

Source: Car sharing companies, collected by department of traffic city of Utrecht and estimation

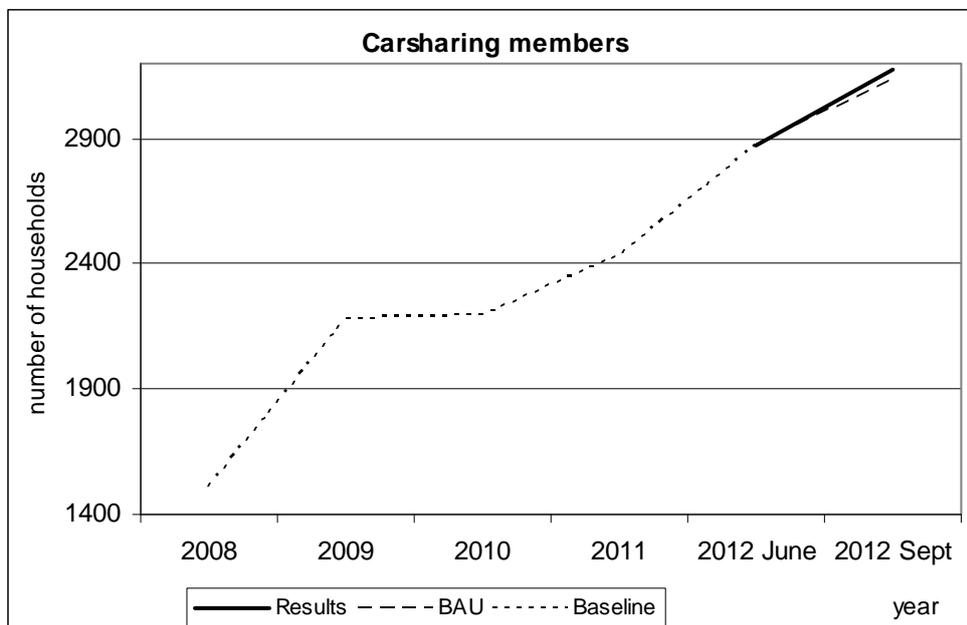
The number of available cars for car sharing through commercial parties has not yet changed (see table 8). It wasn't expected to grow, as only when a certain number of new members is achieved and/or the usage of the existing cars grows, will the companies add extra cars. In

creases in the number of cars available will always follow increases in the number of members with some delay. As the campaign just started the results in terms of an increase in members is still small. Table 3 shows the number of available cars in the years before the campaign and in 2012.

There were some signals that the number of privately available cars for car sharing did grow (through for instance MyWheels). However as not all informal shared cars are registered there are no reliable numbers available on this and therefore it was excluded from the evaluation results as mentioned before.

Last years car sharing membership was growing. Figure 6 shows the trend during the whole CIVITAS period. As the campaign started later than expected, results could only be measured from June 2012 until Sept 2012. So far the growth in car sharing membership hasn't differed much from the business-as-usual scenario.

Figure 6 Trend, results and BaU number of car sharing members



The number of members increased by 298 between June 2012 and September 2012. This is a growth of 10%, which is almost the same as a year before. Of the 298 new members 39 requested their membership through the campaign website (see table 4).

Table 4. Growth members commercial car sharing June-Sept 2012

Numbers for Utrecht	New members	New members through website
Greenwheels	294	35
MyWheels (Wheels4All)*	4	4
Studentcar	0	0
ConnectCar	0	0
Total	298	39

* Only the commercial cars are counted in the case of MyWheels. The private cars as offered by their members for the use of car sharing are not taken into account. This is because these cars are not a permanent addition to the daily available fleet of shared cars in Utrecht. Families could for instance decide to only offer their cars for car sharing during the summer, when they need them less.

In the three months that the campaign has been implemented it resulted in a small growth in car sharing membership of at least 1% (only the members who requested through the campaign website).

Utrecht no.	Pointer no.	Indicator	BaU	After	Difference After - BaU	%
3	13	Number of car sharing members	3136	3175	39	1%
4	14	Number of available commercial shared cars in the city	216	216	0	

Source: KpVV (2012) and commercial car sharing organisations

C2.5 Society

The impact of the campaign on society consists of increased awareness and acceptance of car sharing. Besides this the awareness of the campaign was measured, as this should influence car sharing awareness.

Car sharing awareness and acceptance

Car sharing awareness and acceptance was measured by two questions in the Utrecht residents' panel questionnaire. These questions were posted twice, once in October 2011 before the launch of the campaign and the second time in September 2012 just after the launch.

As there wasn't any comparable measurement before 2011, there is no baseline trend. In 2011, 30% of the panel members knew what car sharing was and 44% thought car sharing was attractive (see table 6).

Utrecht no.	Pointer no.	Indicator	Results residents panel Oct 2011
3	13	The awareness level of Utrecht residents on car sharing: Do you know what car sharing is? (yes)	30%
4	14	The acceptance level of Utrecht residents on car sharing: Do you think car sharing attractive? (yes)	44%

Source: Residents panel city of Utrecht (Bewonerspanel) (Oct 2011, N= 994)

The impact of the campaign was measured by asking panel members whether they noticed the campaign or not and comparing the people who noticed the campaign (results) with the people who didn't (BaU). Table 7 shows the difference in awareness and acceptance between panel members who did and didn't notice the campaign.

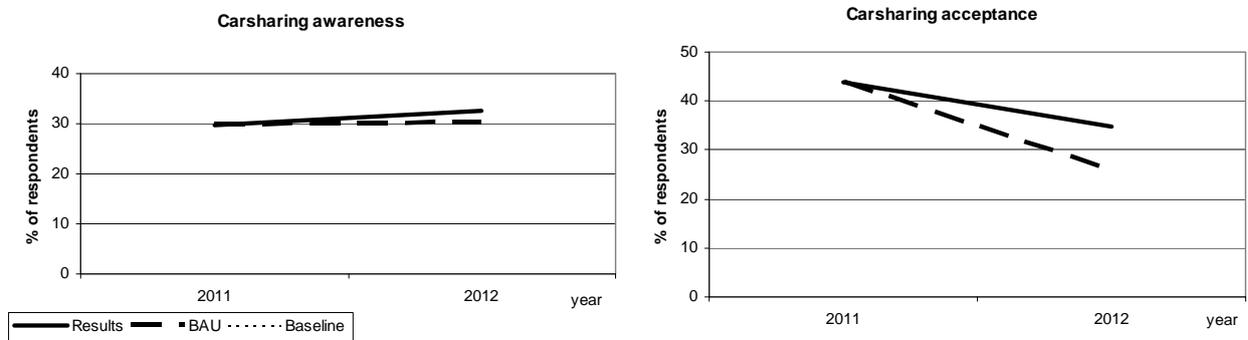
Utrecht no.	Pointer no.	Indicator	% noticed campaign (n= 193) - results	% not noticed campaign (n=2435)- BaU
3	13	The awareness level of Utrecht residents on car sharing: Do you know what car sharing is? (yes)	33%	30%
4	14	The acceptance level of Utrecht residents on car sharing: Do you think car sharing attractive? (yes)	35%	26%

Source: Residents panel city of Utrecht (Bewonerspanel) (Sept 2011, N = 2672)

In figure 7 the results are reported in graphs. It shows that car sharing awareness was 30% in 2011 and increased to 33% for the people who noticed the campaign. For the people who didn't see the campaign the awareness stayed the same.

Car sharing acceptance showed a strange development as in 2011 acceptance was 44% and in 2012 the acceptance was decreased to 35%. Acceptance was measured through perceived attractiveness of car sharing. It seems that people think car sharing less attractive than a year ago before the campaign started. There is no clear reason for this. It could be that more people know what car sharing really is and found out it's not something for them; however the awareness (knowledge of what car sharing is) didn't change much. As measurements from the years prior to the campaign are not available, it's not possible to see what the trend was like in previous years. Acceptance should be monitored further over the remaining life of the project to enable better interpretation of the results.

Figure 7 Results and BaU car sharing awareness and acceptance



The results are reported as the difference between panel members who reported noticing the campaign and panel members who didn't. Table 8 shows the results of the campaign on awareness and acceptance. Car sharing awareness seemed to have increased slightly from 30% to 33% however this is not a significant increase. The acceptance of car sharing grows as people who did notice the campaign were more likely to consider car sharing attractive.

Focusing on the differences between people who noticed the campaign and the people who didn't, implies that the campaign only consists of the top-down approach with flyers. But an important part of the campaign was communicated/conducted by word of mouth and in other less recognisable ways. Beside this it could be the case that people who were already more aware of car sharing noticed the campaign more often. Both results therefore require further discussion.

Utrecht no.	Pointer no.	Indicator	BaU	After	Difference After - BaU	%	Significant change
3	13	The awareness level of Utrecht residents on car sharing: Do you know what car sharing is? (yes)	30%	33%	+3	9%	no
4	14	The acceptance level of Utrecht residents on car sharing: Do you think car sharing is attractive? (yes)	26%	35%	+9	36%	yes

Source: Residents panel city of Utrecht (Bewonerspanel) (Sept 2012, N = 2672)

Campaign awareness

Although the awareness of the campaign is not an objective itself, it is one of the ways to get people more aware of car sharing. From the Utrecht residents' panel 193 of the 2,672 responding panel members in 2012 noticed the campaign. This is 7%.

The website was visited by 977 different people (22nd of August 2012) in the first three months of the campaign.

C3 Achievement of quantifiable targets and objectives

No.	Target	Rating
1	Increase the percentage of people acquainted with the concept of car sharing by 20%	0
2	Reach a minimum of 10,000 people with information on car sharing through either website or flyer	NA
3	Increase the number of car sharing households in the city by 400 (thereby also increasing the number of shared cars in the city as a result).	0
NA = Not Assessed 0 = Not Achieved * = Substantially achieved (at least 50%) *** = Achieved in full ***** = Exceeded		

At this moment none of the quantifiable results have been achieved. The impact of this measure completely comes from the effects of the car sharing campaign. The campaign started a lot later than planned; therefore there were only three months for which the effects could be measured. It is expected that the results of the campaign will increase in the near future. It is expected that the change in behaviour (become a member of a car sharing company) will not be effectuated immediately after seeing the campaign. The campaign continues until the end of 2012. The present results were achieved with only about 25% of the actions planned for the campaign.

C4 Up-scaling of results

If the campaign turns out to be successful it can also be launched outside the city of Utrecht, in other areas in the region where car sharing potential is high according to the target group research conducted for this measure.

C5 Appraisal of evaluation approach

Delayed start of the measure had effects on the evaluation. The start of the campaign was delayed and therefore the project had not been completed by the time of this report. This means that the full impacts of the project are not yet apparent, with many of results from the campaign expected to happen over a relatively long period because it takes time for people to re-evaluate their car ownership and usage options. While the quantifiable targets and results of the project have not yet been achieved, they may well be met by the end of the campaign. More activities are planned and after the campaign has ended (probably the first half of 2013), the results will be evaluated again and maybe more lessons can be learned.

As far as the evaluation approach is concerned, for this evaluation the effects of the campaign had to be measured: first the awareness of the campaign and second the way that this campaign influenced the people who saw it.

Before the campaign was developed an evaluation approach was planned with a control group to check if results could really be allocated to the campaign. The initial idea was to aim the

campaign only at certain neighbourhoods. However while developing the campaign it was decided not to pursue specific target areas, but only target groups. These groups were reached both with a city-wide campaign and through the Nudge network (in a specific area, but could also be through friends or acquaintances). It was not possible to select a group of residents that definitely wouldn't have noticed the campaign and use them as a control group. This made it difficult if not almost impossible to measure awareness and acceptance of car sharing linked to the campaign. This was solved by asking people if they noticed the campaign or not. However these answers are not completely reliable as the campaign also has the bottom-up approach through the Nudge network and it could be that people didn't recognise this as part of the campaign.

So measuring awareness of the campaign and linking the campaign to awareness and finally behaviour change (becoming a car sharer) could not be measured in a reliable way with the evaluation approach planned and the data collected.

For this evaluation the number of new members through the campaign website, are the most reliable results. However, it should be noted that people who did notice the campaign could also sign up directly with a car sharing company and bypass the campaign site.

Also in relation to the evaluation approach it was decided not to include the increase in the number of privately offered cars for car sharing as these numbers don't give a complete picture. However the campaign does target both commercial and private car sharing. The number of privately offered cars for car sharing will probably grow faster than the number of commercially available cars. There were indications of growth in privately offered cars for car sharing, but these positive developments are not included in the current results.

C6 Summary of evaluation results

The key results are as follows:

- **New car sharing members** – in the first three months of the campaign the number of car sharing members increased by 298. 13% of this growth (39 new members) could be directly linked to the campaign, as they signed up through the campaign website. The campaign continues at least until the end of 2012 and 75% of the campaign activities have not yet taken place meaning more results will be available at a later date. .

C7 Future activities relating to the measure

At the time of evaluation the campaign was still continuing. More activities are planned, and after the campaign is ended (probably at the beginning of 2013), the results will be evaluated again. If the campaign turns out to be an effective way to stimulate car sharing, the campaign could be set up in a larger area, the province for instance. The research and technology research already conducted will help in decisions regarding which areas to target as the areas in the region which have high potential for car sharing have already been identified.

D Process Evaluation Findings

D.1 Deviations from the original plan

The deviations from the original plan comprised:

- **Implementation of campaign was delayed** – At the start of this measure there were problems with budgets. It was not clear where the co-finance budget should come from. Only at the beginning of 2010 was the budget found and arranged. Only then could the target research which was to be used as input for the campaign design start. As the measure started almost a year later than planned, the implementation of the campaign was delayed and only started in June 2012.
- **Extension to informal and commercial car sharing** – The original plan aimed to increase the awareness of the 'bottom-up approach' of car sharing, which means that people organise the car sharing in an informal way. In practice only two car sharing companies offer this approach. To avoid influencing the market, the decision was made to aim at both informal and commercial car sharing. Furthermore it was decided to delete the objective to decrease the costs for car sharers; the market is responsible for the pricing of car sharing.
- **Extended scope of the campaign** – At first, the plan was to set up the campaign in such a way that only those neighbourhoods that showed the highest potential for added growth in car sharing were targeted. Due to the decision to use both a bottom-up approach and a top down communication, the scope of the campaign widened to the surrounding neighbourhoods (and the rest of the city) as well. It was no longer possible to speak of a 'campaign-area' and a 'control site-area'. Instead, even though the campaign had its definite 'campaign neighbourhoods' (neighbourhoods that were more actively approached in the campaign than other neighbourhoods), it could not be said that certain neighbourhoods had been completely bypassed by the campaigns' efforts.

D.2 Barriers and drivers

In this chapter barriers and drivers are described for each measure phase (between brackets the barrier/driver field number as described in the process evaluation guideline).

D.2.1 Barriers

Preparation phase

- **Finding public funding (9)** - From the beginning of this measure there have been problems with the availability of public funding. It has been uncertain where the cofinancing of this measure should come from. A regional fund was used to enable the start of this measure. This took some time, only at the beginning of 2010 was it clear how to finance the measure, therefore the measure planning was delayed.
- **Extra work and time necessary for target group research (8)** – While the research was conducted to plan and budget by SmartAgent, there were two items in the results of the study that didn't match our demands:
 - The text style of the summary: The summary had to be communicated to the political directors. The summary didn't consider the whole picture that's why the project team corrected the text itself.

- The survey among current car sharers didn't portray the whole picture: First, the survey was just focused on the customers of only one of the car sharing agencies. The results were out of balance and not representative. Therefore the research agency had to expand the survey with the customers of the other stakeholders (car sharing agencies).

Implementation phase

- **Lawsuit threat (1)** – One of the car sharing companies had objections to the facilitating of special price arrangements for car sharing for the citizens of Utrecht. They felt that the city and the other car sharing companies had cheated them of their price advantages by offering these deals in light of the campaign. Even though they had long known about these special deals for Utrecht citizens before the start of the campaign and, in the opinion of the municipality, had had every opportunity to be involved in these agreements or pose their objections at an earlier stage of the process. The company threatened the city with a dispute only days before the launch of the campaign and the website. Though the municipality felt there had been no inappropriate behaviour on account of these agreements, the threat of this possible exhausting lawsuit resulted in a last minute reconsideration of the strategy.

D.2.2 Drivers

Preparation phase

- **Pilot electric car sharing (4)** – One of the Dutch car sharing companies, Greenwheels worked on a pilot for the implementation of electric car sharing vehicles in Utrecht, Rotterdam, The Hague and Amsterdam. This project could affect the measure positively. Implementation of this pilot (not part of CIVITAS) took place in 2011, after which its results were used to improve this measure. There has been no direct impact on the campaign but it has resulted in a wider range of shared cars.

Implementation phase

- **Research available for campaign design (4)** – The results of the research are used to select specific areas and target groups that have good potential for car sharing. The quoted communication agencies for the car sharing promotional campaign were asked to take this into account. It is expected that the campaign will be more effective with the knowledge of the different target groups in the city and how to reach them.
- **Cooperation of two agencies for campaign (8)** – The combination of promotional efforts and the strong bottom-up promotional strategy, explained before in the section on innovative aspects of this measure and the cooperation of Nudge and Emotion.

D.2.3 Activities

Preparation phase

- **Regional co-funding was organised (9)** - The lack of additional co-funding was solved by the obtaining of regional co-funding.

Implementation phase

- **Continuation of the campaign with a new deal (5)** – The lawsuit threat organised by one of the car sharing agencies was solved by the organisation of separated special deals for the citizens of Utrecht, instead of all cooperating to offer more or less the same

deal. Part of the means of communication had to be modified because of the changed deal.

D.3 Participation

D.3.1. Measure Partners

- **City of Utrecht**- department of traffic and transport, responsible for coordinating the campaign and sponsor of the research on target groups.
- **SmartAgent** - a research agency specialising in research on consumer experiences. They were involved in research into the target groups using online questionnaires.
- **Nudge** - an independent organisation which facilitates and uses an environmentally friendly consumer platform to support and promote sustainable initiatives and projects by bringing people together. This platform is comprised of "Nudgers"; people who signed up to this platform and together form a large network of so called "neighbourhood mayors", working bottom-up for a more sustainable society. This network was put into use for this campaign. (www.nudge.nl).
- **Emotion** - a communication agency, hired to design the campaign lay-out and website and oversee the creative part of the campaign. Their main contribution has been the design of the means of communication. (www.emotion.nl).

D.3.2 Stakeholders

- **Car sharing agencies:**
 - **Greenwheels** - which has the biggest market share of about 85% and has a fleet consisting of city and family cars in Utrecht, some of which are electric. Their car fleet is spread quite evenly over the different neighbourhoods of the city. (www.greenwheels.nl)
 - **Connectcar** - which provides city and family cars, mainly focused on a young population. The market share of this organisation in Utrecht has slightly declined over the last years. However, future investments in the Utrecht market are expected from Connectcar. (www.connectcar.nl)
 - **MyWheels / Wheels4all** - also provides city and family cars. Wheels4all is a non-profit organisation and operates with 'car ambassadors' – car sharers who take an extra interest in the concept of car sharing and the environment - who manage the shared cars. Members have a lot of control, for example in terms of the type of car and the location. (www.wheels4all.nl). Note: the company is currently in transition to a new concept; MyWheels. This concept includes private car sharing as well as commercial car sharing. The new website is; www.mywheels.nl.)
 - **Studentcar** - is a relatively new organisation in the Utrecht market, they have been active in the city since 2010. Currently they have four small cars placed near several of the student housing lots and facilities in Utrecht. (www.studentcar.nl)
 - **SnappCar** - is the newest organisation, and is different from the other organisations in the sense that they solely provide a platform for car owners and car sharers to find each other so that the two groups can benefit from each other. In other words, they facilitate private car sharing. They do not have their own fleet of cars. They are different in this sense from MyWheels, which offers both the above mentioned platform and a fleet of cars for

commercial car sharing. SnappCar can therefore almost be included in the other category of informal car sharing. (www.snappcar.nl)

- **Vereniging voor Gedeeld Autogebruik (Association of informal car sharing)** - was involved in a smaller sense. They offered no special deals for the citizens of Utrecht to give car sharing a try. They are however the go-to organisation for people who, after hearing of car sharing through the efforts of the campaign, went to organise their own shared car with neighbours, friends or family. They do therefore benefit from the campaign in a small way. (www.autodate.nl)
- **(potential) target groups** – (potential) carsharing target groups like bike users, public transport users, car owners.

D.4 Recommendations

D.4.1 Recommendations: measure replication

In Utrecht the car sharing measure was implemented to increase modal split towards sustainable modes. This measure is attractive for every city wishing for less car usage in the city to decrease air pollution, traffic jams or shortage on parking space.

This measure only asks for a good developed campaign at first. As the image of car sharing is different for each country and attractiveness of a campaign is very cultural, a specific campaign should be developed for different countries or cities. Besides this the measure asks for special regulations for car sharing parking places or similar benefits a municipality can offer.

Furthermore a car sharing campaign is interesting for cities meeting the following conditions:

- **High car usage and ownership among citizens-** car sharing is only attractive for a city if it results in less car usage. If car usage among citizens is low and not many citizens own a car, promoting car sharing could result in an increase of car usage. Citizens could start using a car in stead of public transport.
- **Availability of shared cars (by agencies or private)-** if no cars are available for car sharing a campaign has no sense. So there should be car sharing agencies or private owners considering sharing their car.
- **Enough so called ‘choice travellers’-** a car sharing campaign can only have success if citizens are willing to change their travel mode and consider different ways to travel.

When implementing a similar measure, the following actions are important for success:

- **Lifestyle research** – To organise an effective campaign, data relating to target groups is very useful. A geographical based lifestyle study can help to select the group with the most potential.
- **Bottom-up campaign** – The participation of current users (car sharers) and target groups makes a well-focused campaign and message possible. These groups can directly reach many people by sharing the message in their area. The government is not the main messenger in terms of making car sharing more acceptable to the population.

D.4.2 Recommendations: process (related to barrier-, driver- and action fields)

- **Co-operation with different agencies** – The combination of a consumer platform that is able to organise and promote sustainable initiatives and projects by bringing people together in co-operation with a communication agency that is able to design the right campaign lay-out and means of communication.
- **Competition of the market** – Co-operation with the market parties could be useful in a certain way, but it's important that the market is not affected too much by the municipality.

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