

# Chicagoland Peer-to-Peer Carsharing Pilot Program

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## Disclaimer

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# Project Overview

This research, conducted over 29 months in three phases, focused on piloting peer-to-peer (P2P) carsharing in the Chicago metropolitan area, testing the model in a variety of urban neighborhood types. For this project, the Shared-Use Mobility Center (SUMC) and Alternative Transportation Services, Inc. partnered with a private peer-to-peer carsharing company, Getaround, to provide equipment and operate the pilot. Service went live in August of 2015 and the program extended through October 2017.

The pilot sought to gauge the success of P2P carsharing in different urban and socioeconomic contexts, and to understand uptake and usage among both vehicle owners and vehicle renters. The study took place in three distinctive neighborhood types, mostly located in the central part of the Chicago metropolitan region:

- a high-density, lower income zone (HDLI),
- a low-density medium income zone (LDMI), and
- a high-density medium to high income closed network zone (HDMHI)

This report highlights findings from user data, surveys, and focus groups of vehicle owners and renters in all three areas. Owners in HDMHI zone had the greatest earnings of the three pilot zones, and the area saw the highest utilization of the program per capita. The HDLI had the greatest number of participants, and the LDMI zone had the highest average vehicle utilization rate.

Pilot zone renters appreciated the lower cost of P2P carshare compared to traditional carshare and had high levels of overall satisfaction with the service. Many owners were interested in participating but expressed dissatisfaction with their earnings in the program.

The program appears to have had some effect on participants' travel behavior. According to surveys and interviews, renters began to plan their trips more carefully, and some owners decreased trip-making by solo driving, while increasing use of other modes, such as biking, walking, transit, and ridehailing. These changes in owners' travel behavior appeared to result from the desire to keep their vehicles available for rent, thus increasing their income from the program.

Intensive, street-level marketing emerged as a key element to successfully building a user base for the P2P service and sustaining its utilization in all three neighborhood types.

# Background Information

The Shared-Use Mobility Center (SUMC) in conjunction with Alternative Transportation for Chicagoland, Inc. developed this pilot project to research how peer-to-peer carsharing would function in different neighborhood types.

The following overview of the carsharing business model and market draws from research on carsharing, the state of the industry, and best practices from existing carsharing organizations. SUMC reviewed literature and data from around the world, paying particular attention to P2P carsharing in the North American market.

## Industry Background

### What Is Carsharing?

Carsharing is a service that provides members with access to an automobile, usually for intervals of less than a day, and typically by the hour or the minute.

Major carsharing business models include *traditional* or *round-trip*, which requires users to borrow and return vehicles at the same location; *one-way* or *free-floating*, which allows users to pick up a vehicle at one location and drop it off at another; and *peer-to-peer (P2P)*, which allows car owners to earn money at times when they are not using their vehicles by making them available for rental to other carshare members. (Feigon and Murphy, 2016)

### What Are the Benefits of Carsharing?

Carsharing offers the convenience of access to a car without the full financial burden of ownership. Given fuel prices, maintenance and repair costs, parking costs, and other unexpected expenses, owning a car can be financially infeasible or undesirable for many people. Carsharing, on the other hand, offers an affordable and predictable means of using a car. Carsharing is often popular with people who use a vehicle (or second or third vehicle) infrequently, but still need a car on occasion, and want to avoid the cost and burden of required maintenance and upkeep for a vehicle that sees minimal use. The affordability of car sharing, as compared to car ownership, allows households to reduce their transportation expenditures, freeing up discretionary income that can either be reallocated to other expenses or held as savings to increase a household's financial assets.



The use of shared vehicles also reduces the number of total vehicles on the road, producing environmental and quality of life benefits in cities where it is prevalent. The literature on changes in vehicle ownership associated with carsharing membership was well established prior to the explosion of new mobility changes that have occurred over the last five years. A widely cited 2010 University of California, Berkeley study found that between 9 and 13 cars are sold or not purchased for each carshare car. (Martin, Elliot et al, 2010). Studies have also shown that carsharing members can reduce their overall cost of living and increase their use of public transit. For instance, a 2011 study noted that more than 65 percent of respondents with carsharing memberships take transit a few times a week or more compared to approximately 41 percent of respondents without carsharing memberships (Nelson\Nygaard, 2011). Research also indicates that carshare members reduce VMT and their personal CO2 emissions.

## Who Uses Carsharing?

A 2017 study by Dill, McNeil, and Howland summarized demographic findings to date about carsharing, finding that members are disproportionately female; are predominantly younger adults, are generally well-educated (over 80% held a bachelor's degree); live in smaller than average households; and mostly live in households without a car. Dill et al also touched on attitudes and motivations behind the use of carshare:

Literature also points to shared attitudes among participants: They are generally concerned about environmental and social issues, sensitive to transportation costs, more interested in the pragmatic uses of cars, and are more willing to try new things... Motivations for participating in carsharing often stem from cost savings and the convenience of not owning a car (or an additional one). Lower-income members are more likely to cite affordability and personal freedom as reasons for joining carsharing, while higher-income members were more likely to cite convenience. . . . (Dill et al., 2017)

It should be noted than much of the formative research on carsharing, its user base, and its impacts took place before the widespread adoption of ride-hailing services such as Uber and Lyft. The carsharing market has undergone considerable consolidation since the advent of these services, with many community-based and nonprofit carsharing organizations ceasing operations or selling to large national commercial carsharing companies such as Zipcar and Enterprise, which in turn closed down or significantly scaled back operations in many cities. In cities where it remains, the

nature and application of carsharing continues to evolve in the face of the transformative presence of Uber and Lyft. New entrants in the marketplace are exploring a variety of business models and changes that may occur in the impacts of carsharing as it continues to evolve are unclear. It should be noted that this evolving marketplace was the context in which the pilot described in this research was unfolding.

## How Is Peer-to-Peer Carsharing Different?

While borrowing someone's car, and even paying for the privilege, is nothing new, P2P is a relatively new model of carsharing in which "a person either rents a vehicle from someone else, or conversely, rents their own vehicle to someone else, usually by the hour or day, via a third-party operator that facilitates the exchange." (Lewis and Simmons 2012) Like traditional carsharing, P2P is operated by carsharing operators (CSOs) that provide the hardware, software, and related services needed to enable rentals. However, unlike traditional carsharing, P2P CSOs do not provide a fleet of vehicles; instead, individual owners put their cars up for rent, set rental rates, and approve or disapprove renters based on requirements. Renters, conversely, search for cars that fit their needs, budget, and location requirements.

According to a recent study by Dill, McNeil and Howland, P2P carsharing may have the potential to overcome some shortfalls of traditional carsharing services, including socioeconomic and geographical issues that often exclude lower-income households. The price of renting is generally lower than traditional carshare, and the vehicles can be located anywhere there is a willing owner, unlike traditional carshare where operators locate in economically favorable areas. (Dill, McNeil and Howland, 2017)

## Program Description

### Research Objectives

The pilot explored several objectives. By collecting and analyzing quantitative data from in-vehicle technology and qualitative data gathered through various survey mechanisms, the researchers sought to answer several questions:

1. Who will use P2P carsharing?
2. How will P2P carsharing be accepted into varying types of urban forms as a new transportation option?

3. How will the P2P carsharing model serve different market types, including low-income and low-density, that have not traditionally been served by carsharing operators?
4. How will P2P participation impact users' other travel behaviors, such as mode choice and whether or not to own a vehicle?
5. What strategies will help the P2P industry scale in the Chicagoland area?

To answer these questions, the researchers looked to such indicators as overall program participation, user experience of car owners and renters, and spatial analysis of the areas where program participants made their cars available. The researchers developed core metrics for measuring pilot outcomes based on methodologies from previous carsharing studies, which were adapted for P2P evaluation.

### Market Selection Process and Project Pilot Zones

To select the focus areas for the pilot, the researchers developed a process that included a geographic information system (GIS)-based analysis using 2010 and 2012 Census data, along with community screenings to identify areas in the Chicago

region that fit within the target area constraints. The selection analysis was based on income, vehicle ownership, demographics, access to transit, commute mode share, and neighborhood characteristics. This process also derived insights on success factors drawing on the researchers' extensive operational knowledge of carsharing in Chicago.

The first stage of the selection process was designed to substantially narrow the field of potential target markets for the pilot program's launch. Considering the pilot project's goal of launching in very specific community types—low-income

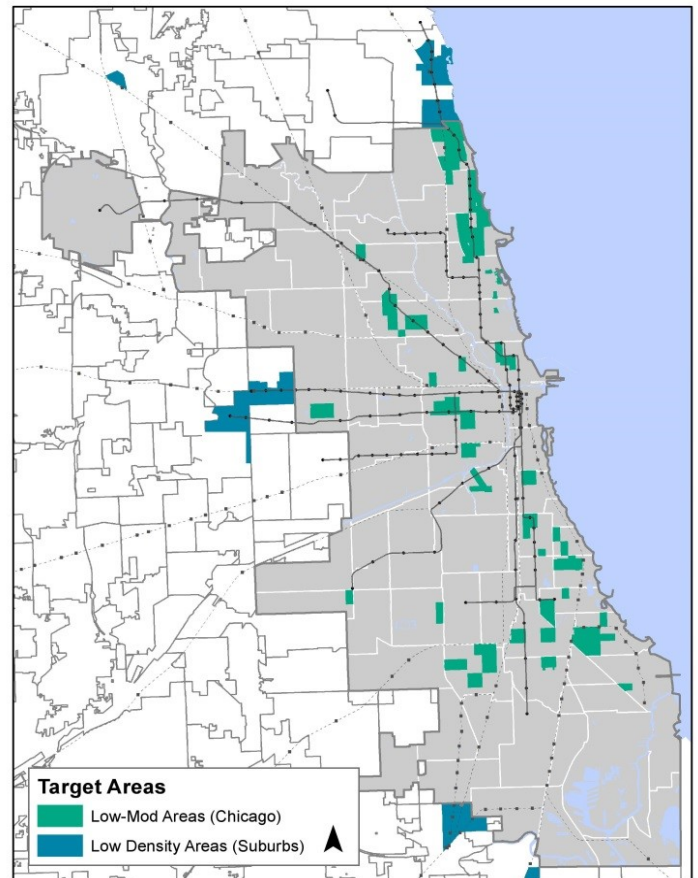
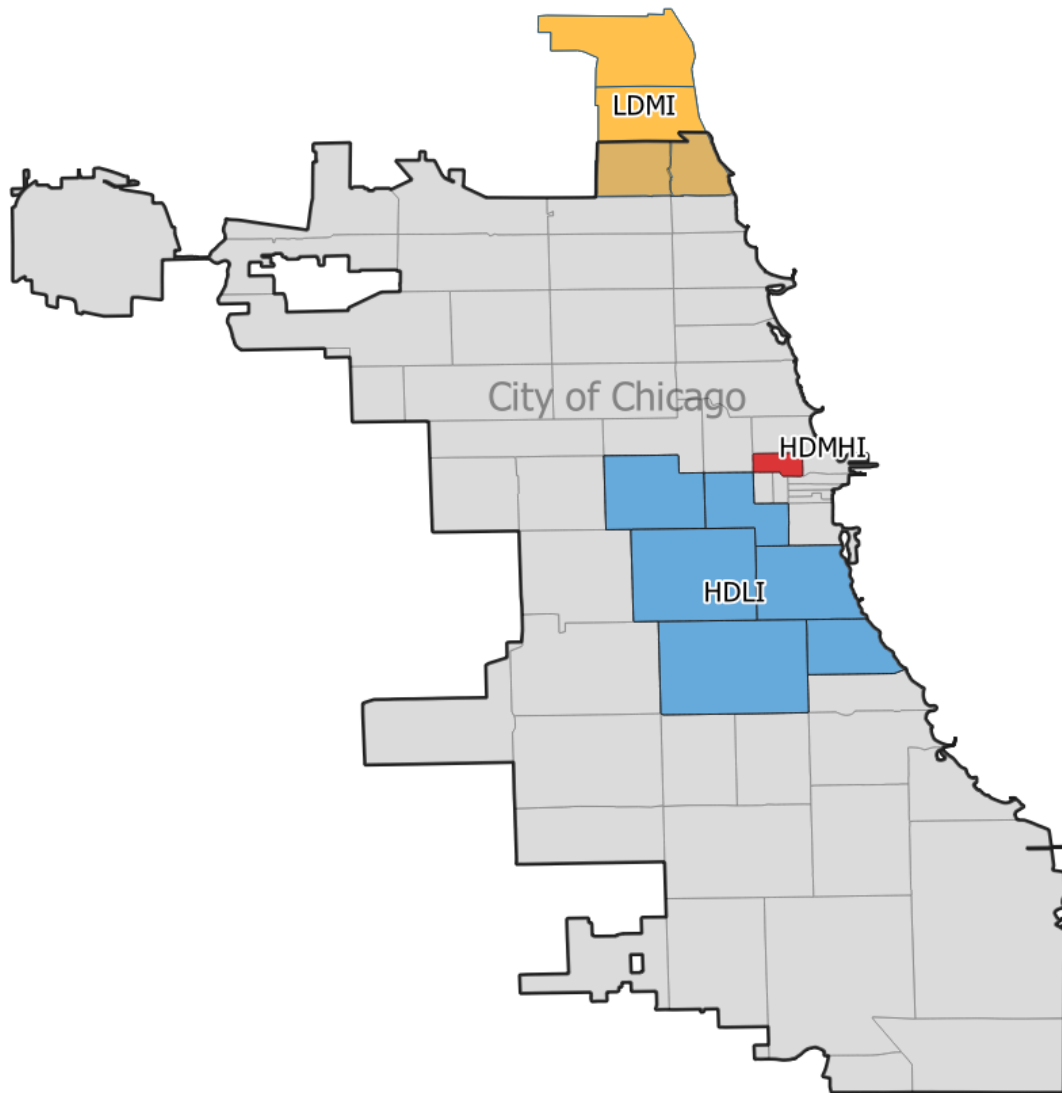


Figure 1. Chicagoland Census Data Analysis

and low-density— and the need to identify areas that despite their atypical income or density levels, demonstrate good potential for carsharing in the form of access to transit, vehicle ownership levels, and travel behavior, a GIS-based process was incorporated into the overall selection process. This data-driven process required the collection of demographic data provided by the U.S. Census as well as geographically-referenced data for transit stations and routes throughout the Chicago region. 2010 U.S. Census tract geographies were used at this stage of analysis. These geographies were queried based on criteria that included low-income and low-density constraints established by the researchers as well as standard demographic and transportation-related thresholds for market potential set forth in the carsharing literature.

To account for market potential in low-density areas, which tend to have car ownership rates and commute patterns that do not align with the standard criteria for carsharing market potential, the commuting and car ownership thresholds used to identify low-density communities were reduced. It is important to note that because the P2P carsharing model requires a minimum level of car ownership in an area, the selection process incorporated the lowest thresholds reported in the literature for this selection parameter. Finally, the researchers considered access to transit as an important attribute to screen communities to identify opportunities to integrate with transit assets in communities and explore opportunities to incorporate park-and-ride locations at commuter rail stations into the P2P implementation strategy. See Figure 1 for census tract data.

The project ultimately grouped 10 Chicago-area zip codes into three different zones, based on predominant urban form and income characteristics.



*Figure 2 Pilot Project Zones*

- **HDLI – Zone 1 – High density, lower income urban.** HDLI was concentrated in a high density urban area southwest of the Loop in downtown Chicago. The neighborhoods of Pilsen, Bridgeport, and Bronzeville are characterized by mostly low-to-medium income households and predominantly black and Latino residents. All but one of the zip codes in this zone had median household incomes under \$42,000, which is 75% of the average median income in Cook County. One zip code had a median income over \$86,000, and one had a median under \$27,000. The median income across the zone is \$41,011. The total population for this zone is 318,928.

- **LDMI –Zone 2 –Lower density, medium income urban/suburban transition.** LDMI was focused in an urban/suburban transition area on the northeast side of Chicago that includes the neighborhood of Rogers Park and neighboring City of Evanston. While still within the core of the Chicagoland region, LDMI was the lowest density of the three models, with the greatest auto-dependency. The four zip codes in this zone have median household incomes ranging from under \$37,000 to over \$70,000. The median income for the entire zone is \$55,178, which is close to the Cook County median income of \$56,900. The total population for this zone is 172,693.
- **HDMHI – Zone 3 –High density, medium to high income urban; closed network.** HDMHI operated within a high-rise residential building with membership available to residents and neighbors. It was concentrated in a residential high-rise in the River North neighborhood, a high density urban area just north of the Loop in downtown Chicago. The researchers wanted to test P2P in a “closed” network, where members sharing their car with people they already knew or who were primarily part of their building, block, or neighborhood. River North is characterized by medium to high-income residents, including the high-rise One Superior Place, which had agreed to host this zone of the pilot and permit the researchers to conduct marketing in the building. The median income for the zip code in which One Superior Place is located is \$93,848, which is 165% of the median income for Cook County. The population for the entire zip code in which One Superior Place is located is 17,328.

## Research Activities

Research was organized into a three-pronged approach to understand the impact of the pilot: (1) member surveys, (2) focus groups, and (3) data tracking and analysis.

The researchers and Getaround worked together to contact participants for surveys and focus groups, and Getaround provided the researchers with monthly pilot zone data for owners and renters. The researchers defined participants as those who resided within the pilot zone zip codes. Owners’ vehicles could be rented by individuals residing outside the pilot zone, and pilot zone renters could access cars located outside of the pilot zone. In detail, the researchers conducted the following research activities:

## Surveys

Car owners and renters who participated in the program were asked to complete a series of surveys throughout the course of the program that would assess their motivations to join or exit the program, and their overall experience as program participants. SUMC administered an Entrance Survey, Mid-program Survey, Exit Survey, and Final Survey at different intervals of the program based on when members signed up to participate. SUMC created two versions of each survey, except the exit survey which was just sent to owners: a car owner survey and a car renter survey. Getaround was responsible for emailing the surveys to pilot participants, and SUMC collected and analyzed the survey results.

Survey questions related to mode choice, vehicle ownership, thoughts on different transportation modes, and other relevant inquiries to identify any changes that could be attributed to program participation. More detail on the surveys, their focus, and timing of their administration is provided in Appendix E, and survey results in Appendix G.

## Focus Groups

SUMC conducted focus groups with pilot program participants to understand the perceptions and behavioral issues that impact the use of Getaround and other modes of transportation. SUMC conducted five focus groups over the course of the pilot. Getaround assisted SUMC in recruiting pilot participants for the focus groups by emailing participants in the pilot zones, in coordination with SUMC. SUMC hired a third-party consultant to provide focus group services for the P2P pilot, with assistance from SUMC staff. The consultant assisted with developing and refining key research objectives for focus groups, providing question guides, and moderating the focus group for each 90-minute recorded session. Focus group summary findings can be found in Appendix H.

## Usage Data

Using its in-vehicle carsharing technology and reservation and billing software, Getaround collected data on pilot participants, vehicles, and actual trips made through the pilot program. Getaround provided this raw data to SUMC for analysis on a monthly basis. The primary data points provided to SUMC were:

- owner data
- new owner leads

- renter data
- new renter sign ups
- trip data
- vehicle utilization
- hardware units installed
- hardware units uninstalled

## Performance Indicators

Researchers developed the following performance indicators in advance of launching the pilot. Data was collected through in-vehicle carsharing units deployed, participation data, survey responses, and focus group responses.

### **Market Penetration**

- Recruit owners and renters to join the pilot program with a final goal of 275 vehicles
- Serve a population not served by traditional carshare vehicles
  - Serve a lower-income and ethnically diverse population
  - Serve a lower-density population
  - Serve a closed, private network
- Identify barriers to entry and incentives to join P2P carsharing programs

### **Vehicle Ownership**

- Encourage owners and renters to postpone vehicle purchases

### **Mode Shift**

- Encourage mode-shift to means of transportation other than driving personal automobiles (i.e. walk, bike, public transportation, or other shared services)
- Reduce participant vehicle miles traveled (VMT)

### **P2P Carsharing Operations and Efficiencies**

- Identify trends/characteristics of the most utilized P2P vehicles
- Identify operational inefficiencies or efficiencies that impact participation in the pilot in the following categories:
  - Ease of using technology;
  - Responsiveness of customer service; and
  - Insurance and other policies.



## Provider Selection Process

Following a request for proposals and evaluation process, an independent panel of experts identified Getaround, a for-profit P2P carsharing provider, as the most qualified vendor for the P2P pilot. No other vendor had the appropriate infrastructure to operate during the pilot. Getaround had previously entered the Chicago market, but had pulled back after a difficult initial experience; this project required Getaround to re-enter the Chicago market and they used this opportunity to build a wider network in Chicago.

This partnership required compromises from both parties to make the pilot project possible. One goal of the project was to test P2P interest and acceptance for owners and renters in multiple settings. The researchers anticipated that a closed network—in which members are located proximately and share common ties such as being in the same building, block, or neighborhood—would be more popular. However, because of how the technology operated, the network selected (HDMHI) was not truly “closed” in the sense that any Getaround member could rent from anywhere in the network and owners could rent to anyone who was a member.

The researchers also anticipated that grassroots marketing—face to face and in contexts beyond marketing to tech-savvy audiences, addressing technology barriers, and making the program easy to use—would be successful, and ultimately persuaded Getaround to incorporate more such activities, discussed below.

## Marketing

In addition to conducting research, SUMC and Getaround worked together on a number of strategies to reach renters and owners in the pilot zones. The primary goal of this marketing was to encourage more vehicle owners from the pilot zones to list their cars on the Getaround platform. Getaround and SUMC engaged in field outreach, digital outreach, and marketing campaigns in the pilot areas.

While Getaround marketing relies on digital advertising, and in general designs its system with a fairly tech-savvy user base in mind, SUMC chose grassroots marketing strategies, such as tabling street fairs, farmers markets, and community centers, in part to reach people who were not digitally connected. During the third phase of the project, (June 2017-October 2017), Getaround and SUMC focused even more on large scale field outreach events and advertising including a CTA campaign to reach vehicle owners. Over the course of the pilot, SUMC worked with Getaround to participate in

or lead nearly 40 outreach events in the pilot zones. For more details on outreach strategies see Appendix G.

# Project Outcomes

## Owner and Renter Recruitment

The pilot recruited 197 owners to take part in the program. There was a much higher level of interest among renters than owners in participating in the Getaround platform. Pilot zones averaged over four times as many renters as owners.

- HDLI had 558 renters signed up and 129 owners. Factoring in the zone’s total population, that means that for every 5,000 residents, there was 1 owner and 5 renters.
- LDMI had 181 renters signed up and 38 owners. Factoring in the zone’s total population, for every 5,000 residents there were 2 owners and 10 renters.
- HDMHI had 106 renters signed up and 30 owners. Factoring in the total population of this zone’s zip code, for every 5,000 residents there were 9 owners and 31 renters. Because the pilot was marketed specifically at residents within one building, the concentration was likely much greater in the target area.

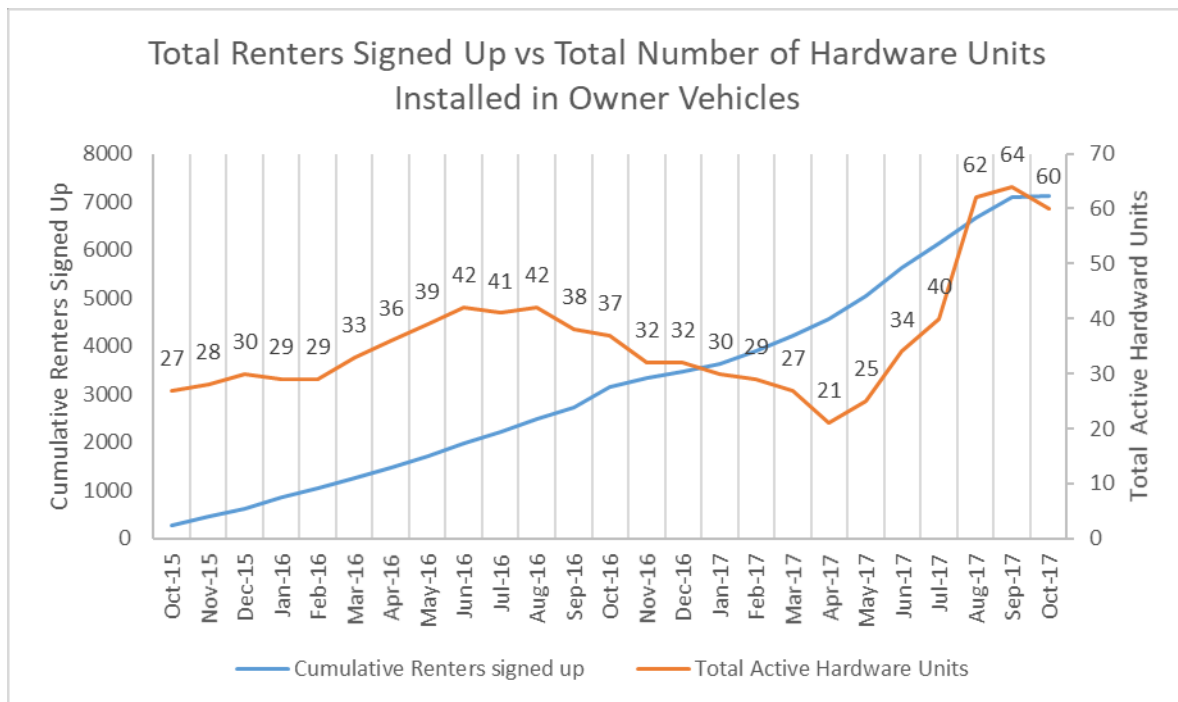


Figure 3 Getaround Renters Signed Up and Hardware Units Installed in Pilot Zones (factoring in de-installations)

A majority of respondents to the market readiness survey had used a sharing economy service in the past (including Uber, Lyft, and AirBnB) and were familiar with the concept of shared services, which indicated that P2P could be successfully integrated into the carsharing marketplace. P2P offered a financial benefit and economic opportunity to both owners and renters. Entrance Survey owners reported listing their vehicle on Getaround because they don't drive their vehicle often and saw it as an opportunity to make extra money. Entrance Survey renters found Getaround to be a more affordable option compared to some other carsharing or ride-hailing services.

Nearly all participants were satisfied with the ease of use of the Getaround app, and felt more comfortable booking with an app than an in-person interaction for personal or safety concerns. In all zones, participants were very drawn to the minimal interaction required between owner and renter. One participant explained they preferred using Getaround because, "you don't have to deal with anyone [i.e. to exchange keys] . . . meeting people is uncomfortable."

The program required participants to have a credit or debit card (to set up electronic payment). It was important to SUMC that a debit card option was offered because that made it more accessible. Participants also had to have a smartphone (to download and use an app). Getaround did have the option available for people to call to reserve a vehicle without use of a smartphone, but reported that it was not used. In a market readiness survey administered to 114 potential users, 5 respondents reported not having a credit or debit card, and 22 reported not having a smart phone so at the time of pilot launch, there were interested parties that would not have been able to access the service.

Both LDMI and HDLI focus group participants suggested that Getaround could have recruited more owners and renters by emphasizing P2P carsharing's potential value as a community asset that utilizes pre-existing resources and provides a valuable service to residents in terms of mobility and potential income.

## Demographics

SUMC collected survey results from a total of 391 participating renters and owners. Consistent with previous carsharing research, the pilot participant demographics in this study were skewed toward college educated young adults (between the ages of 20-29).

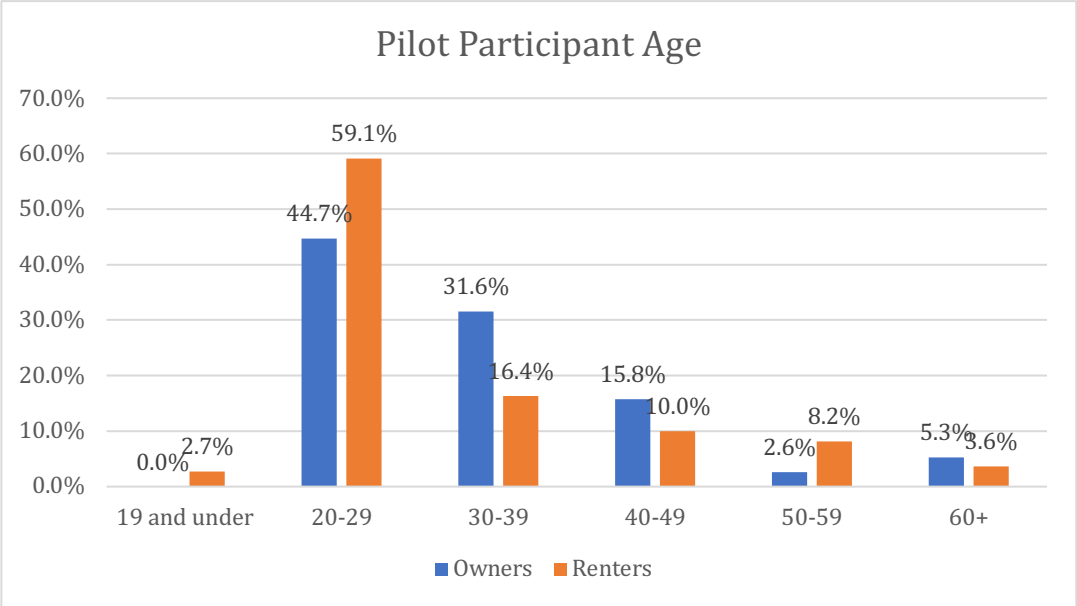


Figure 4 Pilot Participant Age

Unlike previous research indicating that more females than males participate in carshare, males outnumbered females as both owners and renters in the P2P pilot zones.

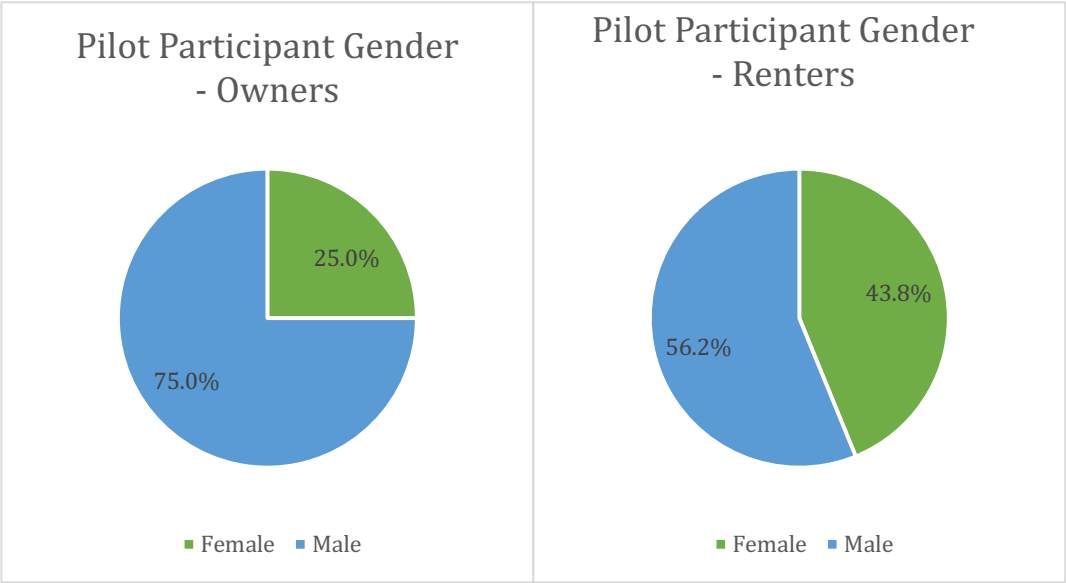


Figure 5 Pilot Participant Gender – Owners

Figure 6 Pilot Participant Gender - Renters

A majority of participants were college educated. 88.3% of owners and 68.8% of renters had a four-year degree or higher. In Cook County, about 36% of residents have a bachelor’s degree or higher. 94.2% of owners and 91.8% of renters had at least some college education.

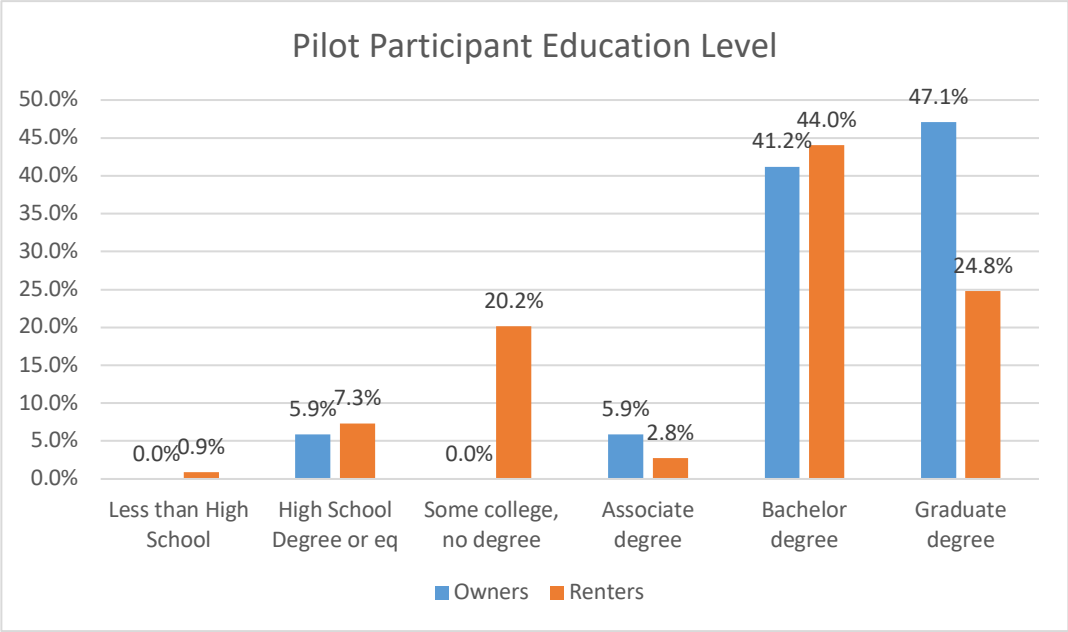


Figure 7 Pilot Participant Education

Owners had a higher average income than renters; almost half of owners surveyed reported earning \$75,000 or more. Although not conclusively, this could indicate that in general, P2P carshare owners have higher annual household incomes than P2P carshare renters.

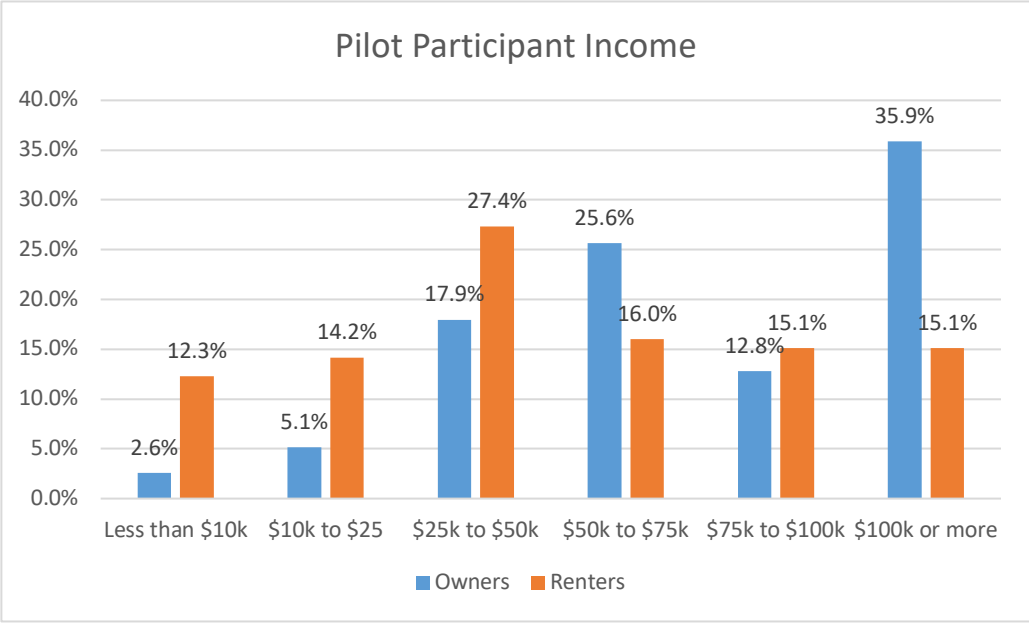


Figure 8 Pilot Participant Income

Renters were more ethnically diverse than owners.

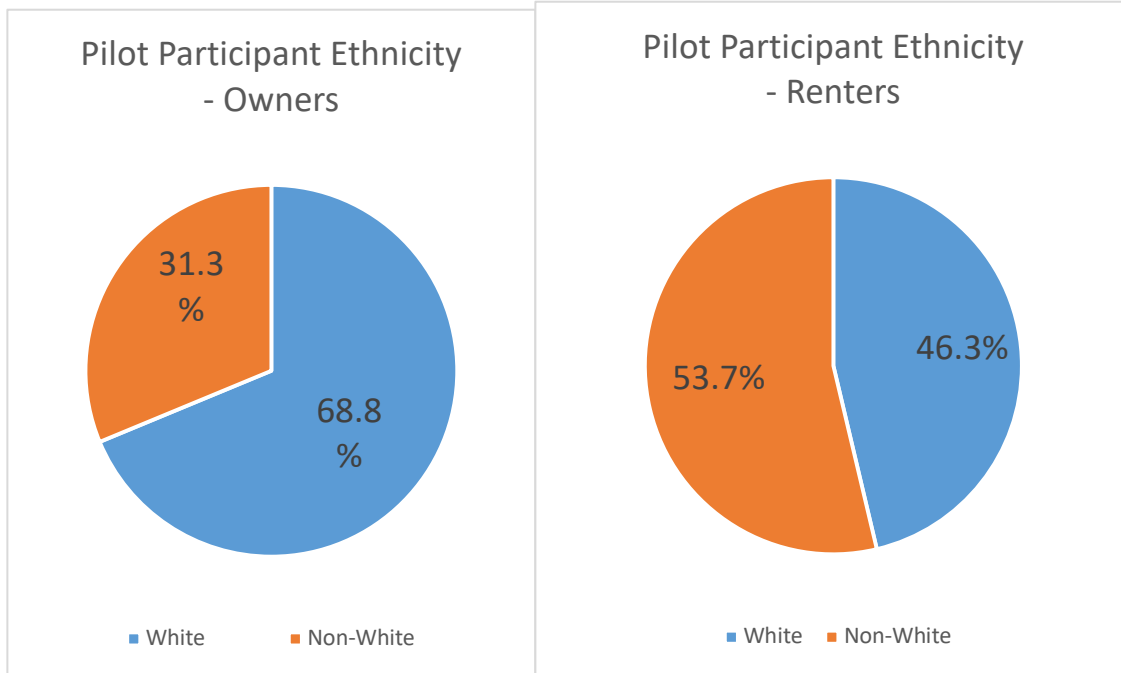


Figure 9 White vs Non-White – Owners    Figure 10 White vs Non-White - Renters

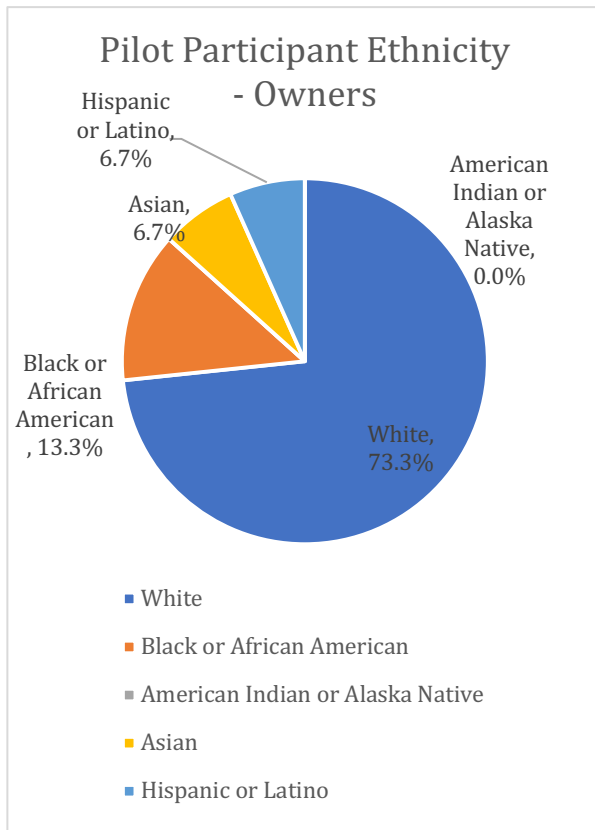


Figure 11 Ethnicity - Owners

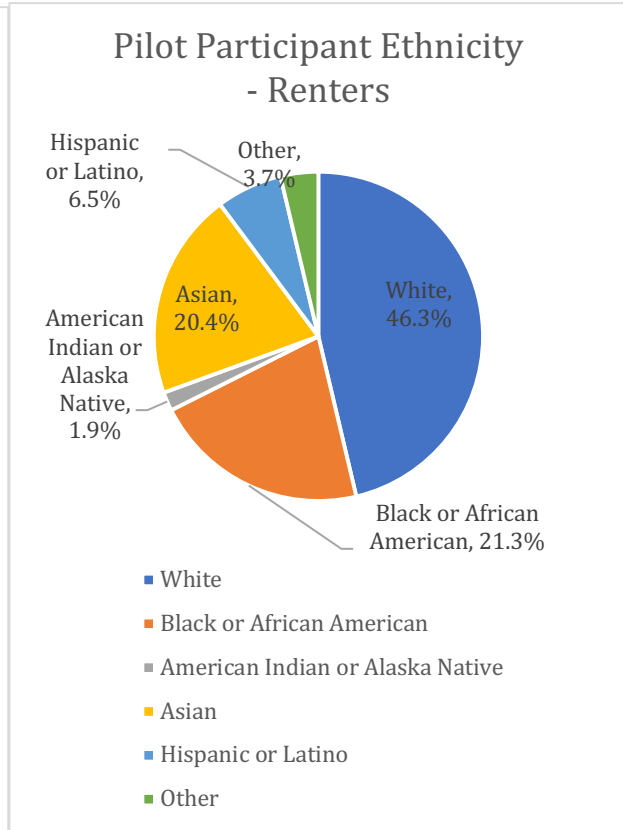


Figure 12 Ethnicity - Renters

## Vehicle Utilization

The utilization rate was defined as the time a vehicle spent rented compared with the total time of a listing. This includes vehicles that were never rented.

Table 1 Overall Vehicle Utilization

Overall Vehicle Utilization	
Vehicles	195
Highest	70.6%
Lowest	0.0%
Average	10.6%
3rd Quartile	15.3%
Median	6.4%
1st Quartile	1.2%



The low density, medium income area (LDMI) had the highest average utilization rate of 13.8%, compared to the program average rate of 10.6%. The high density, medium-to-high income zone (HDMHI) had the second highest average utilization rate of 10.2%, however, the area also had the highest 1<sup>st</sup> quartile at 3.6% utilization. This implies that HDMHI owners were less likely to be left with no earnings. All but 6.25% of vehicles in HDMHI were rented at least once, whereas 12.8% were unused in LDMI and 14.5% were unused in HDLI. The high density, low income area (HDLI) had the lowest average vehicle utilization rate with 9.6%. The HDLI zone had both the most utilized single vehicle at 70.6% and a very high 3<sup>rd</sup> quartile. See Tables 2-4 for breakdown by zone.

Table 2 HDLI Utilization

HDLI Vehicle Utilization	
Vehicles	124
Highest	70.6%
Lowest	0.0%
Average	9.6%
3rd Quartile	20.1%
Median	5.8%
1st Quartile	1.5%

Table 3 LDMI Utilization

LDMI Vehicle Utilization	
Vehicles	39
Highest	67.3%
Lowest	0.0%
Average	13.8%
3rd Quartile	14.4%
Median	6.9%
1st Quartile	1.5%

Table 4 HDMHI Utilization

HDMHI Vehicle Utilization	
Vehicles	32
Highest	26.3%
Lowest	0.0%

Average	10.2%
3rd Quartile	15.3%
Median	9.4%
1st Quartile	3.6%

While the LDMI vehicles made available were more utilized, renters surveyed felt underserved because there were so few vehicles available to rent. Renters from the LDMI and HDLI zones suggested increasing marketing towards owners. Renters in the smaller HDMHI zone expressed greater satisfaction with vehicle availability, likely because that pilot zone area was smaller. According to Getaround, the service struggled to grow in LDMI due to low population density and low non-car commuter index (which measures households with commuters that don't own a car). For high-density areas, renters recommended that Getaround invest in designated parking spots for vehicles in locations where street parking is often challenging to locate.

## Owner Earnings

Owner earnings were calculated on a per-vehicle basis. This includes vehicles that never made earnings. Numbers below represent owner take-home pay after Getaround collected 40% of vehicle earnings. This does not include the additional \$20 monthly owner fee, which hurt underutilized vehicle owners even more.

*Table 5 Pilot Zone Vehicle Monthly Earnings*

Overall Vehicle Monthly Earnings	
Vehicles	195
Highest	\$1,038.20
Lowest	\$0.00
Average	\$165.99
Median	\$109.81
1st Quartile	\$17.70
3rd Quartile	\$258.26

- Average vehicle earnings were highest in the HDMHI zone, with average monthly earnings of \$247.
- Average earnings by vehicle were second-highest in the LDMI network, with average annual earnings of \$165.
- Average earnings were lowest in the HDLI network, with average annual earnings of \$145.

See below for tables breaking down monthly vehicle earnings by zone.

*Table 6 HDMHI Vehicle Monthly Earnings*

HDMHI Vehicle Monthly Earnings	
Vehicles	32
Highest	\$800.25
Lowest	\$0.00
Average	\$247.08
Median	\$217.41
1st Quartile	\$89.68
3rd Quartile	\$349.10

*Table 7 LDMI Vehicle Monthly Earnings*

LDMI Vehicle Monthly Earnings	
Vehicles	39
Highest	\$728.51
Lowest	\$0.00
Average	\$165.05
Median	\$120.54
1st Quartile	\$19.31
3rd Quartile	\$272.67

*Table 8 HDLI Vehicle Monthly Earnings*

HDLI Vehicle Monthly Earnings	
Vehicles	124
Highest	\$1,038.20
Lowest	\$0.00

Average	\$145.36
Median	\$91.75
1st Quartile	\$13.58
3rd Quartile	\$235.22

Renters from the lower-income market (HDLI) expressed great interest in using Getaround. However, owners were more sensitive to - and complained about - high costs associated with listing their vehicles, and expressed frustration that owners had to pay a membership fee to Getaround while renters did not. In some cases, owners lost money listing their vehicles due to service fees. Renters in both HDLI and LDMI expressed enthusiasm for the program, but also expressed frustration that there were not more vehicles available. In the final stages of the program, Getaround dropped its \$20 monthly fee on owners, which had a clear and immediate positive impact on signup rates.

## Mode Shift and Vehicle Ownership

In the surveys and focus groups conducted through the course of the pilot, vehicle owners and renters reported that their travel behavior changed after they began using the service, generally with the effect of reducing solo car travel and increasing use of other modes.

Though many owners initially reported that they did not anticipate changing their travel behavior because of listing on Getaround, at the Midprogram Survey, owners reported that their travel behavior included more walking, ridehailing, public transit, and bicycling, and less driving alone in their vehicle. For example, an LDMI owner reported riding his bike more instead of driving, so he could keep his van available for rent. The Final survey found similar behavior changes, with owners reporting using public transit, walking, or biking more than they were when they were not participating in Getaround.

Renters reported similar changes. At the Midprogram survey, renters reported that after joining Getaround, they had begun to plan trips more carefully. An HDMHI renter reported that, “having this option [Getaround] has made me realize I can live without a car”, a common sentiment among renters. However, some renters reported using a vehicle more often than they normally would, while continuing to use public transit and walking for their primary weekday and weekend travel modes.

While participation in P2P carsharing impacted travel behavior for non-commute trips, surveys and focus groups found that participation carsharing had a negligible effect on commute-related trips.

Both renters and owners reported that they primarily commuted using public transit, which was unaffected by their participation in Getaround. This is to be expected, as commute trips are not an important use case for carsharing, which is generally used more for occasional trips or errands.

P2P carsharing may, in some instances, enable vehicle trips that would otherwise not be made by renters. A HDMHI renter described a recent experience with Getaround: “Without Getaround I would not have gone to Ikea, I would have just ordered my item online and had it delivered”.

P2P carsharing services may also encourage vehicle owners to keep their vehicle that they were considering selling, because they can potentially make money on an underused asset. An HDLI owner claimed that “If it wasn’t for Getaround I would have sold my car already.” Two surveyed vehicle owners bought their vehicles with the intention of listing on Getaround. Responses like these support the idea that while P2P carsharing has the potential to reduce VMT by changing travel behavior, there isn’t enough evidence to conclusively say that P2P carsharing reduces VMT.

## Trends/Characteristics of Highly Utilized Vehicles

Renters reported that cost and location of the vehicle were the most important factors in deciding which to rent. Of the 195 vehicles in the pilot, only 35 were utilized over 20%, meaning the time rented was 20% of the total length of the listing. These more successful vehicles were priced below the overall average rates for the pilot. The average pricing of the most utilized vehicles was \$7.95 per hour, \$74.73 per day, and \$440.20 per week (though not all owners offered weekly rentals), compared to program-wide averages of \$10.03 per hour, \$92.4 per day, and \$556.50 per week. The top five most utilized cars were a Suzuki, a Honda, a Toyota, a Chevrolet, and an Audi in that order. Of the 35 vehicles utilized over 20% of the time, 7 were Toyotas, but 17 different vehicle brands were represented in all with an average year of 2011 compared with the pilot-wide average of 2012.

## Participant Experience

Pilot vehicle owners and vehicle renters had different experiences. Renters seemed generally satisfied with the service, while owners were less satisfied with their experience. Common issues that came up in focus groups from all three pilot zones included a lack of marketing to vehicle owners, issues with Getaround GPS device not locating vehicles in their actual location, the connect device draining vehicle batteries, and unresponsive customer service. Renters were generally happy with the ease of using the Getaround app and found the service convenient and affordable.

Marketing and the cost to list a vehicle were the primary factors that produced dissatisfaction among owners. While renters could use the Getaround platform with no membership cost, owners were charged a monthly fee, plus 40% of rental earnings. Owners in the HDLI zone were especially sensitive to these costs.

The exit survey was designed specifically to help understand why owners removed their vehicles from the platform. The most common reasons for delisting were to sell the vehicle, because of low owner earnings, or due to a lifestyle change. In pilot zones, 25% of delisting owners cited the reason as to sell their vehicles, which was higher than owners in non-pilot zones. Another 14% of owners in pilot zones reported delisting because of a lifestyle change, they likely needed the vehicle more for commuting or other reasons, which was also higher than delisted owners in non-pilot zones. 12% of pilot zone owners reported delisting because of insufficient earnings, which was lower than owners in non-pilot zones. Another frequently cited reason for delisting was technology issues with the Getaround connect device. Most owners who delisted reported being generally happy with the way renters treated their vehicles, but only about half of the owners reported being satisfied with their earnings. (For detailed exit survey results, see Appendix H).

## Findings about Marketing

In surveys and focus groups, many participants bemoaned a lack of marketing by Getaround. Several focus group participants complained that there weren't enough vehicle listings, and attributed that to a lack of strategic marketing toward owners. Many focus group participants had initially hesitated to join Getaround because they were not familiar with the platform. "It seemed sketchy," said one participant. This may indicate that Getaround's strategy of emphasizing digital marketing is not sufficient to earn the trust of more potential users. Some suggested that Getaround open a bricks-and-mortar store so as to have a physical presence in the region.

In Year 3, the researchers and Getaround had a higher marketing budget, which allowed participation in more events like street festivals. The researchers worked with Getaround to participate in a CTA campaign. The researchers and Getaround both attribute an acceleration in owner onboarding in the final months of the pilot to this greater marketing exposure. Getaround doubled its number of Chicagoland vehicle listings between April and August of 2017.

In early summer 2017, at the researchers' recommendation, Getaround began offering a 90-day free trial to vehicle owners, waiving the \$99 connect device fee and any service fees. This likely also contributed to the increase in onboarded owners in the third phase of the pilot. Additionally, a

promotional email to all pilot zone owner leads (obtained at outreach events) who had not yet listed their vehicle offered to waive the Getaround installation and service fee. August 2017 was the most successful month in terms of owner listings and rentals for Getaround in Chicago, and the most successful month for all pilot zones.

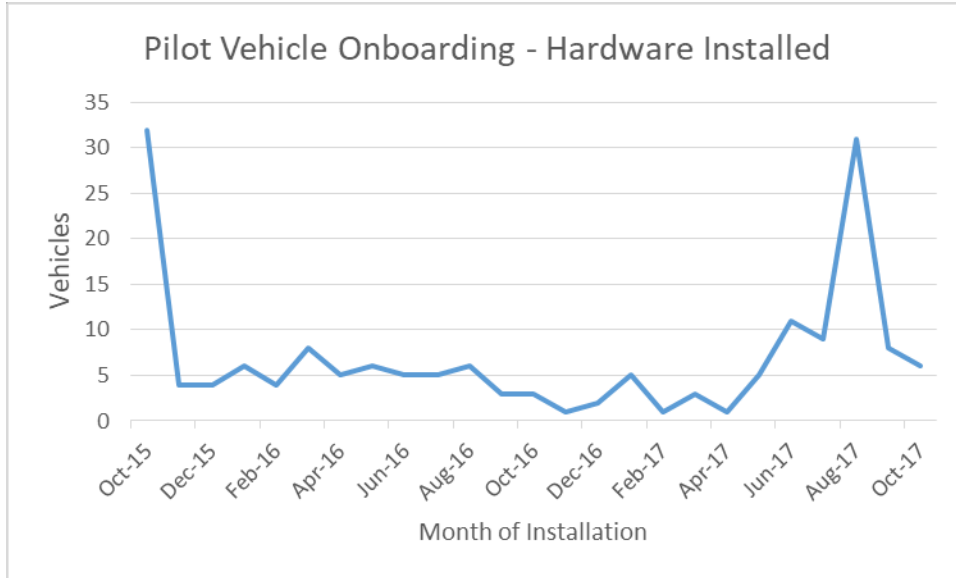


Figure 13 Number of Hardware Units Installed Each Month in Pilot Zones

# Conclusions

P2P carsharing services like Getaround can increase the availability of transportation options for residents who don't own vehicles, or don't want to pay the cost associated with owning a vehicle in the city. The pilot provided an opportunity to test the market readiness for P2P in at least two areas (lower income and low-density) that would likely not have been pursued so soon in a new city.

P2P carsharing was readily adopted, but varied in utilization and owner earnings. The high-density, medium to high income area (HDMHI) was the highest performing of the pilot zones and Getaround reported that it was one of the top performing zip codes in all of Chicagoland. The low-density (LDMI) zone had the highest utilization of vehicles. Owner earnings were highest in the HDMHI zone. The HDLI zone had the highest number of rental listings and the highest number of actual rentals. The grassroots marketing efforts resulted in higher utilization overall in Chicagoland than initially anticipated.

Pilot zone findings:

- Owner earnings were greatest in the high-density, medium to high income zone (HDMHI), then the low-density, medium income zone (LDMI), then the high density, low income zone. Vehicle utilization was greatest in the low density medium income zone (LDMI).
- There was a greater diversity in ethnicity, gender, and age among renters than among owners.
- Participation by owners and renters was skewed towards the college educated and people between the ages of 20-29.
- P2P participation led owners to choose other modes more often and renters to plan trips more carefully. It did not definitively change vehicle ownership or VMT.

The P2P carsharing model has the potential to better serve low-income and low-density areas that have been underserved by traditional carsharing operators, if owner costs and fees are reduced, marketing efforts are carefully considered, and enough vehicles are made available.



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# Appendices

## APPENDIX A: Pilot Program Overview

### I-GO Carsharing

This pilot was originally conceived by Sharon Feigon, former CEO of I-GO CarSharing, a social venture established in 2002 by the Center for Neighborhood Technology (CNT) that offered Chicagoland residents mobility using shared vehicles. I-GO's mission was to reduce car ownership rates, decrease transportation costs, reduce urban congestion and improve air quality in Chicagoland neighborhoods. Individuals, families and businesses could purchase a membership for access to I-GO's fleet located throughout the City of Chicago and its suburban areas, providing members with an economic and environmentally friendly transportation solution. By 2013, I-GO had an established membership of over 15,000 sharing a fleet of close to 300 vehicles, one-third of which were hybrids. In June of 2013, I-GO was sold to Enterprise Holdings. The remaining non-profit entity was renamed Alternative Transportation for Chicagoland (ATC), and continued to operate as part of the Center for Neighborhood Technology. A small portion of the proceeds from the sale of I-GO went on to fund the creation of the Shared Use Mobility Center (SUMC). After its creation in October of 2014, SUMC partnered with ATC and ultimately took over management of the pilot project.

### Partnership with Getaround

In September 2014, ATC released an RFP for a partnering vendor to provide the equipment necessary to run the P2P carsharing program. The RFP included hardware, software, support, roadside assistance, insurance, call center, installation/inspection consultant, and fleet/technology consultant. An independent panel of experts evaluated and scored the responses, identifying Getaround as the most qualified vendor in January 2015.

Getaround is a for-profit peer-to-peer carsharing provider that offers a network of on-demand, roundtrip, hourly, and daily P2P carsharing opportunities. Getaround began operating the P2P Carsharing Pilot Program in October 2015. The partnership required Getaround to provide the researchers with monthly data for the three target pilot zones based on zip codes.

To join Getaround, both owners and renters download the Getaround app on their phone and create a member account that links to a Facebook account and bank account. To use Getaround, customers must have a Facebook account and must also own a smartphone capable of downloading the app, with internet access. The app serves as a reservation platform and is also required for GPS tracking, and to remotely unlock the vehicle.

Participants in the pilot are defined as either car 'owners' or car 'renters', both of which are covered by Getaround insurance.

## Division of Labor

As recipient of the pilot program funds, SUMC was responsible for designing, carrying out, and evaluating the pilot program in accordance with the criteria set forth by the FHWA and CDOT. SUMC's duties and responsibilities included pilot planning, marketing and outreach, research and evaluation, and reporting.

As a contractor of SUMC, Getaround was responsible for operating the Getaround peer-to-peer carsharing service according to the specifications of the pilot program set forth in the vendor agreement. Getaround's duties and responsibilities included operations, marketing, outreach, and data support.

ATC was the fiscal agent of the project.

## Project Timeline

SUMC developed a pilot timeline and work plan in partnership with Getaround, and engaged in marketing and outreach activities in the pilot zones. Using monthly data provided by Getaround, The researchers analyzed and evaluated the results of each pilot zone from owners and renters, which was used to inform this report.

The pilot was divided into three time periods:

- Phase: June 1, 2015–May 31, 2016: Work on the grant agreement, vendor agreement, and research plan began in June, and operations with Getaround began in October 2015.
- Phase 2: June 1, 2016–May 31, 2017: The original grant was anticipated to end May 31, 2017.

- Phase 3: June 1, 2017–October 31, 2017: The grant agreement for the pilot program was extended to end on October 31, 2017.

## Grant Extension

During the first two years of the project, the pilot consistently fell short of target growth goals. This could be attributed to a low marketing budget, poor market readiness, an inadequate supply of vehicles, or other factors. As a result, a large portion of funding for the pilot remained unspent. SUMC petitioned for a grant extension in May of 2017. While awaiting the extension approval, the program continued to operate and all data was collected normally.

## Appendix B: Defining Terms

**Renters:** People who rent the owners' vehicles for a defined price and period using the vendor's carsharing software. Renters must pass the vendor's eligibility requirements and adhere to the vendor's Renter Policies and Procedures. Eligibility to rent on Getaround requires that an individual must be at least 19 years old with at least two years of driving experience. Drivers under 21 must have no violations or accidents in the past 36 months, and no individual may have more than 2 moving violations in the past 36 months. Getaround will not allow any individual to rent if they have had a drug or alcohol-related violation in the past 3 or 7 years. Additionally, Getaround accepts international licenses for renters.

**Owners:** People who rent out their personal vehicles through the vendor's carsharing software for a defined price and period. Owners and their vehicles must pass the vendor's eligibility and inspection requirements, and the owners must adhere to the vendor's Owner Policies and Procedures. Eligibility to list a vehicle on Getaround as an owner requires the car to be a 2005 or newer and have less than 125,000 miles. In some cases, Getaround may require documentation of most recent service. Any vehicle with an Actual Cash Value greater than \$75,000 is considered a specialty vehicle. Owners are required to pay a one-time \$99 fee for Getaround to install a GPS tracking device and remote unlocking technology, which usually takes two days. Getaround membership is free to owners for 30 days, then costs \$20 a month to list a vehicle. Beginning August 2017, Getaround waived the \$99 startup/installation fee and \$20 monthly service fee for vehicle owners in pilot zone areas, to onboard more vehicle owners. Owners can list their vehicle at a price of their discretion, but Getaround suggests a price range based on the type of vehicle to stay competitive. Owners make 60% of rental earnings, and Getaround takes the remaining 40%.

## Appendix C: Insurance

Getaround provided coverage for the duration of each rental, from start to finish, including liability, collision and comprehensive coverage. Renters are covered for up to \$1 million or three times the state minimum in liability. Coverage includes personal liability for the renter, third-party liability for passengers and other affected parties, and third-party property damage arising from a car accident. Vehicle owners are covered up to \$1 million in liability. The owner comprehensive and collision coverage provided covers for theft, fire, vandalism, weather damage, and any damage to the vehicle in the event of an accident up to the actual cash value of the vehicle. Personal Injury Protection is provided when mandated by the law, and uninsured coverage is \$25,000/person and \$50,000/accident in Illinois.

## Appendix D: Target Market Selection Process

The target market selection analysis screened areas based on a range of demographic and transportation-related factors, many of which were identified in the carsharing literature as being indicators of market potential. While this quantitative approach helped the researchers focus in on a smaller group of communities within the Chicago region, the selection process also relied heavily on SUMC's experienced staff for further evaluation and screening of communities throughout the selection process. Ultimately, the combination of quantitative and qualitative analyses produced the three model zones that demonstrated best potential for the pilot program.

To focus in on more standard and recognizable geographies, the next step in the process involved looking for spatial relationships between identified priority census tracts and larger geographies, including Chicago community areas (CCAs) and suburban municipalities. This enabled the selection process to focus in on clusters of selected census tracts and the larger communities. Identifying and then aggregating census tracts in this way helped the researchers take a more holistic approach to community outreach and in developing local partnerships with elected officials and community groups. Moreover, having identified the census tracts that best fit the defined criteria, the researchers were able to take a targeted approach to initial marketing and recruitment in eventual launch markets. In cases where clusters of flagged census tracts spanned CCA boundaries or were evident in adjacent CCAs with community or jurisdictional ties, these areas were further aggregated into community CCA clusters. For example, the four CCAs along Chicago's lakeshore just south of the downtown area make up what is referred to as Bronzeville, a large community with strong community ties and shared community identity.

While the pilot program intended to test and implement P2P carsharing in non-traditional markets, to ensure a baseline of acceptance and adoption in any eventual launch market, each of these areas were screened for existing carsharing services. Using publicly available data for the locations of existing CSO fleet vehicles in the Chicago region, communities with no carsharing presence were eliminated from the selection process. Figure 1 identifies the CCAs and suburban municipalities with significant concentrations of highlighted census tracts and a minimum degree of carsharing service.

## Appendix E: Division of Labor

### SUMC Scope of Work

1. Pilot Program Planning: SUMC developed a pilot timeline and work plan in partnership with Getaround.
2. Marketing and Outreach: SUMC, in partnership with Getaround, engaged in marketing and outreach activities in the pilot program zones. Although ATC worked with Getaround on marketing and outreach, Getaround was ultimately responsible for successfully recruiting pilot Participants.
3. Research and Evaluation: SUMC, using data supplied by Getaround, analyzed and evaluated the carsharing results. SUMC also lead other research activities including literature review.
4. Reporting: SUMC regularly produced and compiled monthly and quarterly reporting to CDOT, IDOT, and the FHWA.

### Getaround Scope of Work

1. Operations: Getaround operated the P2P carsharing service and managed all equipment and activities related to the service operation. As part of its role as operator, Getaround undertook the following services:
  - a. Contracted directly with the owners and renters regarding their participation in the P2P carsharing service.
  - b. Created unique identifiers to track pilot Participants.
  - c. Supplied, managed, and maintained in-vehicle carsharing hardware for up to 275 vehicles installed in the pilot Areas.

- d. Supplied, managed, and maintained a full software suite relating to the operation of the service with integrated reservation and billing systems via a web-based platform, mobile website, and mobile app.
  - e. Dedicated staff to provide 24/7 expert support for hardware and software, including maintenance, upgrading, development, and troubleshooting, and respond to any issues in an amount of time consistent with Getaround's typical troubleshooting wait times.
  - f. Provided 24/7 roadside assistance via the National Automobile Club ("NAC") or other vendor at Getaround's sole discretion.
  - g. Provided an auto insurance program to cover renters and vehicles that meet Getaround's eligibility requirements.
  - h. Provided 24/7 renter and owner support via a call center and integrated email support system.
  - i. Provided installation, inspection, and de-installation services for each vehicle in the pilot.
  - j. Charged pilot participant owners a one-time installation fee in the amount of \$99.
  - k. Dedicated a staff member to serve as a primary point of contact and communicate with ATC's Project Manager on a bi-weekly basis or as necessary.
2. Lead marketing and outreach activities: Getaround worked with SUMC to complete the marketing activities described in their marketing plan.
  3. Provided data to SUMC via its in-vehicle carsharing technology and reservation and billing software. The data collected by Getaround was licensed to SUMC for analysis.

## Appendix F: Survey Descriptions

Surveys were distributed using SurveyMonkey, and consisted of a series of multiple choice, ranking, and short response questions.

### Entrance Survey

- Administered to pilot participants within 30 days of signup to establish baseline data for research.
- Established contract with pilot participants to participate in the pilot.
- Included unique identifier to link with anonymized data collected throughout the course of the pilot.



- Focused on pilot participants' demographics, household composition, travel behavior (thoughts on transportation, estimated vehicle miles travelled, estimated mode share for work and non-work trips), vehicle ownership rates, and other things such as motivations for joining the pilot.

### Mid-program Survey

- Administered in December 2016 to all pilot participants.
- Included unique identifier to link with anonymized data collected throughout the course of the pilot.
- Focused on pilot participants' satisfaction with inquiries into operations efficiencies, perceived benefits, program shortcomings, and other comments or concerns.
- Queried pilot participants' travel behavior (thoughts on transportation, estimated VMT, estimated mode share for work and non-work trips).

### Exit Survey

- Administered to pilot participant owners who take his/her vehicle out of the pilot, within 30 days of delisting.
- Included unique identifier to link with anonymized data collected throughout the course of the pilot
- Sought to collect data on why owners de-listed/removed their vehicles from the Getaround platform.
- Focused on pilot Participants' satisfaction with inquiries into pilot operations efficiencies, perceived benefits, pilot shortcomings, motivations for leaving or continuing in the pilot, and other comments and concerns.
- Also queried pilot Participants' travel behavior (thoughts on transportation, estimated VMT, estimated mode share for work and non-work trips), vehicle ownership rates, and others.

### Final Survey

- For all pilot Participants, a final survey was administered in October 2017.
- Compared travel behavior after pilot participation to baseline data collected before pilot participation.
- Included unique identifier to link with anonymized data collected throughout the course of the pilot.

# Appendix G: Outreach and Onboarding

## Field Outreach

SUMC spent a total of \$13,710.00 on field outreach activities which included a total of 37 street festivals, farmers markets, and social events, including setting up a table at the apartment building where the HDMHI zone was based. Years one and two owner leads at these events were not recorded, however in year three 32 owner leads led to sign-ups that could be attributed to marketing events. While conducting focus groups, SUMC recorded skepticism and concern from owners listing their vehicle, because they had never physically met a representative from Getaround and were concerned it might not be a legitimate company. Getaround conducted their own research and found that on the ground campaigning gave a face to the company, which made potential participants more curious than apprehensive. We found the personal interaction at street festivals and farmers markets to be important for onboarding owners and addressing their concerns. A drawback of having a presence at street festivals and farmers markets was that some people were engaging more for the free giveaways and promotions that Getaround offered, rather than engaging to learn about the opportunity to share their car with the community.

## Digital Outreach

In year two of the pilot program, SUMC invested \$3,000.00 of marketing dollars into digital and print advertising in all three pilot zones. SUMC took out six print advertisements in October 2016 with a local newspaper, Evanston RoundTable, LLC, in the LDMI zone. SUMC also took out a series of digital advertisements with DNAinfo Chicago. The advertisements were included in four DNAinfo neighborhood issues including Bridgeport, Bronzeville, Pilsen, and Rogers Park, and ran from early October 2016 through late November 2016.

## Owner Onboarding by Event

Of the 37 events, 11 events resulted in either car leads (vehicle owners who expressed learning more about Getaround P2P carsharing) or owner signups (owners who listed their vehicles). The chart below represents events that produced owner leads or signups.

<b>Date</b>	<b>Neighborhood (Zone)</b>	<b>Event</b>	<b>Category of Event</b>	<b>Car Leads</b>	<b>Signups</b>
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7/28/16- 7/31/16	Pilsen (HDLI)	Fiesta del Sol	Street Festival	6	3
7/23/17	Pilsen (HDLI)	Pilsen Community Market	Farmer's Market	7	5
7/31/17	Rogers Park (LDMI)	Loyola University Farmers Market	Farmers' Market	7	9
8/2/17	Evanston (LDMI)	Ridgeville Farmers Market	Farmer's Market	4	2
8/6/17	Pilsen (HDLI)	Pilsen Community Market	Farmers' Market	7	0
8/14/17	Rogers Park (HDLI)	Loyola University Farmers Market	Farmers' Market	3	10
8/19/17- 8/20/17	Pilsen (HDLI)	Pilsen Fest	Street Festival	36	1
8/26/17	West Loop (HDLI)	Chicago Green City Market	Farmers' Market	6	0
8/27/17	Evanston (LDMI)	49th Ward Back to School Picnic	Social Event	10	2
9/2/17	West Loop (HDLI)	Chicago Green City Market	Farmers' Market	7	1
9/10/17	Evanston (LDMI)	Evanston Streets Alive	Street Festival	6	2

## Appendix H: Survey Results

### Market Readiness Survey

The Market Readiness survey was administered in the fall of 2016 to 114 potential owners and 116 potential renters in the three pilot zones. The Market Readiness survey sought to determine the market readiness of P2P carsharing in the Chicagoland market. This survey did not distinguish which pilot zone the respondent resided in.

The researchers found only 50% of potential renters and owners had heard of Peer-to-Peer carsharing prior to participating in the Market Readiness survey. However, nearly all participants had previously used a shared service including carsharing, ridesharing, ridesourcing, bikesharing, or home sharing. Participants generally expressed they would be more likely to try P2P if they knew someone else who already used it, or if they knew how much money they could earn or save. Five participants reported not having a credit or debit card, and 22 participants reported not having a smart phone. This is a significant finding because to access the Getaround platform, participants must download an app which requires a smart phone, and must set up an electronic payment.

The survey found that owners' top reasons for owning a vehicle included family transportation, errands, and commuting to work or school. Owners reported their primary modes of transportation during the weekdays and weekends were driving alone, walking, CTA train, or biking.

Renters' top reasons for needing a vehicle included errands and recreation. Renters reported their primary modes of transportation during weekdays were CTA train and bus, followed by walking. Renters reported their primary modes of transportation on weekends were walking, CTA train, and biking.

## Entrance Survey

The Entrance Survey was administered to all pilot participants within 30 days of signing up with Getaround. The survey collected data from 82 renters and 12 owners, with 16 participants skipping the non-required questions, for a total of 94 significant survey participant results. The Entrance Survey collected baseline data on participants' demographics, household composition, travel behavior, vehicle ownership rates, and other topics such as motivations for joining Getaround. The survey found most members heard about Getaround from a friend or family member, Google search, public transit ad, or Facebook advertisement.

### *Owners*

Owners responded that their top reasons for listing their vehicle on Getaround were that they don't drive their vehicle very often, and they want to make extra money. Of the 12 owner respondents, only four had active vehicles (the others were waiting for the Getaround Connect device to be installed). About 50% of owners responded that they use street parking for their vehicle. About 55% of the owners reported driving less than 50 miles per week. One owner purchased their

vehicle with the intent of listing it on Getaround. Owners reporting using their vehicles most often for visiting friends or family, shopping/errands, and weekend recreation. Additionally, most owners reported that they did not anticipate changing their travel behavior of how or when they drive their vehicle, as a result of listing on Getaround. Owners reported using public transit, walking, or biking for their commute to work, and walking, public transit, and driving alone in their vehicle for non-commute trips.

### *Renters*

About 25% of renters reported that they plan to purchase or lease a vehicle in the next year for commuting to work or traveling to locations not easily accessible by public transit. Renters reported signing up for Getaround because they need or want to drive occasionally, do not want to buy a car, want to save money, and care about the environment. Only 22 of 82 renters had rented from Getaround at the time of taking the survey. Some because they hadn't needed to use it yet, and some because there weren't any vehicles available near their home. The survey found renters use or would use Getaround for weekend recreation, shopping and errands, and visiting family or friends. Renters reported vehicle cost as a more important factor than location of vehicle, when renting. Renters anticipated changing their behavior to plan trips more carefully to be as efficient as possible. Renters use public transit and walking for their commute to work, and public transit, walking, or rideshare for non-commute trips.

### Mid-Program Survey

The P2P Carsharing Mid-program survey was administered to all Pilot participants in December of 2016. The Mid-program survey collected data regarding participant satisfaction with operations, benefits of using Getaround, shortcomings of Getaround, travel behavior, and demographics. The survey collected data from 42 renters and 12 owners. Only 5 of the owners fully responded to the survey questions regarding travel behavior, and only 34 of the renters fully responded, for a total of 39 significant survey participant results.

### *Owners*

The demographic data for owners was insignificant due to a low volume of responses. Only five owners completed the Mid-program Survey, which didn't yield significant results. Two owners said they purchased a vehicle with the intention of listing it on Getaround. Only one owner, on average,

drove more than 50 miles per week. Only one owner responded that they use their vehicle for commuting to work.

## *Renters*

The Mid-program survey found that renters consider Getaround most important for shopping, errands and weekend recreation. Renters overwhelmingly responded that using Getaround for commuting trips (to work) is not important at all, and close to 75% reported using public transit for commuting to work. Getaround was not important for weekday recreation, appointments, job interviews, or travel for work. Getaround was somewhat important for visiting friends or family and for moving/picking up furniture. The survey collected data from 42 renters and 12 owners. Only 5 of the owners fully responded to the survey questions regarding travel behavior, and only 34 of the renters fully responded, for a total of 39 significant survey participant results.

Most renters reported joining Getaround because they don't want to own a vehicle, but want to use a vehicle for weekend recreation, shopping/errands, and visiting family and friends. Renters reported that the cost and location of the vehicle are the most important factors in deciding what to rent. Renters reported making most commute and non-commute trips in an average week by public transit, walking, ridesourcing, or biking. Renters reported that after joining Getaround, they changed their travel behavior to plan trips more carefully to be as efficient as possible. Nearly 90% of renters reported that they would recommend Getaround to someone else.

## Exit Survey

The Exit survey was automatically sent to vehicle owners in the pilot zones who delisted their vehicle from the Getaround platform. The Exit survey collected data regarding the reasoning for delisting and not continuing membership with Getaround as an owner. The survey also requested owners input regarding satisfaction with Getaround operations efficiencies, perceived benefits or shortcomings, and motivations for leaving or continuing the pilot. The survey was taken by 31 owners, with 24 significant individual results.

## Final Survey

The P2P Final Survey was sent in October 2017 to any participating vehicle owner or renter in the Pilot areas. The survey sought to determine if Getaround had an influence on users' travel behavior, including vehicle miles traveled. The survey also requested general feedback on user experience

with Getaround including recommendations for improving service and access. It unfortunately had a low response rate of four participants, three of whom were owners and one renter. The survey was sent multiple times, but the response rate remained low.

## Appendix I: Focus Group Findings by Zone

### HDLI Owners Focus Group

This group of owners was the most monetarily motivated group of owners compared to other zones. They were generally not satisfied with their profits and were unhappy with the high monthly owner fee and initial device installation fee. This group also complained that there weren't enough vehicles listed in Chicago, and that if more owners listed vehicles there would be more competitive pricing. These owners, like those in the LDMI zone, felt like they were doing the community a service by listing their vehicle. Their motives for joining Getaround, one owner responded, "I want to help people around me live and work more efficiently, and I can make money" and another owner responded that, "Getaround is a good benefit to the community, especially for people that take public transit and don't own a car". Like the other owners, this group was attracted to the idea of not having to deal with meeting and interacting with renters, and saw this as a benefit from a safety perspective. Several of the owner agreed they "wish the app would locate the vehicle where it's actually parked rather than its 'home' location". This group of owners expressed trust issues with their renters. Some left their vehicles very dirty, others didn't fill the gas tanks, and the consensus was that owners want more information on the renters before they loan out their vehicle.

### HDLI Renters Focus Group

Consistent with other focus groups, all participating renters in this group were drawn to the minimal interaction between owner and renter. One participant explained they preferred using Getaround because, "you don't have to deal with anyone...meeting people is uncomfortable". These renters also appreciated being able to use Getaround without a membership, and being able to instantly book rentals. This group of renters found that Getaround customer service could improve in their response time and in providing renters with information on how to handle an emergency, prior to renting a vehicle. Everyone in this group felt some sense of unease in picking up the vehicle at the home of an owner, because they felt like they were being watched. Similarly, several of these

renters expressed concern for their privacy regarding the GPS tracker and the Getaround sticker on the vehicle. Several renters mentioned they preferred Getaround to other carsharing services because of the variety of rental options, and the option of booking luxury vehicles. A major concern for this group of renters was the lack of available parking when returning the vehicle. One renter complained that “it was very hard to find a place to park, I had to extend the rental an extra hour to find a spot”, and several other renters expressed they had experienced the same issue. One renter suggested that Getaround team up with SpotHero or another parking app, or have dedicated parking for Getaround vehicles in areas that have permit parking or high volume residential parking. Consistent with all other focus groups, these renters found Getaround’s marketing to be lacking, which reflected the availability of vehicles.

### LDMI Owners Focus Group

Turnout for the LDMI owner focus group was low, with only two owner participants. The owners agreed that the cost of listing a vehicle on Getaround is too high. In response to a question regarding owner earnings, one owner replied, “I definitely haven’t recouped the cost...they charge way too much for installation and service charges, and take 40% of earnings”, while the other owner replied, “I was going to sell my car, then I joined Getaround and recovered the cost of joining for the year but I’m not making any more money”. The same owner who chose not to sell a vehicle because of Getaround also bought a second vehicle, with listing the vehicle on Getaround in mind, but the new investment “has not been worth it”. Both owners agreed that the Getaround connect device should have its own standalone battery, as it has caused both owner’s vehicles to die. Both agreed that Getaround customer service is slow, but find the app easy to use, and one owner also appreciated the ability to text message the renters. One owner commented that she would rather not have personal contact with the owner because she “doesn’t want to unconsciously judge the renter based on their appearance and lose trust”. One owner enjoyed the social aspect of Getaround, explaining that, “I usually have text conversations with the renters before they rent the van out and I set it up for them...you can have these really nice conversations with people.” Neither like the Getaround vehicle decal. One owner thought the decal was too small and is pointless, the other owner felt paranoid and nervous that someone might attempt to steal her vehicle, recognizing that it’s a rental. Both owners attributed the low rental rate to a lack of marketing in the LDMI zone. One owner hadn’t changed her travel behavior, but the other owner has changed behavior and has noticed having to schedule weekend plans more in advance, and rides a bike as an alternative to using personal vehicle.



## LDMI Renters Focus Group

LDMI renters were overall happy with the cost of renting a vehicle on Getaround, but believe it could be more affordable if there were more rental options in the area. Like other renter participants, this group was impressed with the waived membership fee and ability to instantly book and access vehicles using the app. Unlike other renters, this group didn't have a preference of meeting with the owner or not. This group appreciated the community and social aspect of Getaround, and believe their participation has positive impacts on the community, and on the environment. This group pushed for a more physical, brick and mortar presence for Getaround rather than relying solely on a digital platform. Like other renters, this group complained about parking and suggested that Getaround invest in parking spots for participating Getaround vehicles. Renters found the app easy to use but mentioned difficulty with scheduling last minute rentals due to a lack of available vehicles in the area. This group brought up a new concern of potential gentrification and "pushing people out" of their community with the introduction of Getaround. The renters were overall very satisfied with the ease of using Getaround and were especially enthusiastic about participating in a service that benefits members of the community. This group had different responses regarding customer service; while some felt it was efficient, others wished there were more communication between the vehicle owner and Getaround customer service to avoid issues when renting.

## HDMHI Renters Focus Group

Like owners, participating renters preferred not to have personal or physical contact with the vehicle owner, going so far as to say, "the less interaction the better". Renters only wanted to speak with the vehicle owner if it's helpful or necessary for the process, like taking the seats out of a van or SUV. Several renters recalled having fast, responsive text message interactions with vehicle owners. Renters were extremely satisfied with the pricing of vehicles and understood the range of prices correlated to the quality of the vehicle. Renters were also impressed that Getaround does not require a membership fee and allows young drivers to rent at the same price as other drivers. Renter concerns included challenge of parking, lack of proof of vehicle servicing and maintenance, and the possibility of being charged for pre-existing vehicle damage. Unlike owners, renters reported positive feedback on Getaround customer service calling it "encouraging", "very helpful", and "very responsive". Additionally, this group of renters were impressed with the reliability, accessibility, and instant access of renting a vehicle using the Getaround app. Several participants

also expressed their appreciation for the community sharing aspect of using Getaround, and voiced their preference in renting from a person in the community rather than a car rental company.