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Cleaner and better transport in cities

ARCHIMEDES

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Monza

R61.1 – Study of a Marketing Strategy to Show Advantages of Car Sharing in Monza

Monza

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Author Simonetta Vittoria
Quality Control Alan Lewis
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Contents

1. INTRODUCTION.....	4
1.1 BACKGROUND CIVITAS.....	4
1.2 BACKGROUND ARCHIMEDES.....	5
1.3 PARTICIPANT CITIES.....	5
1.3.1 <i>Leading City Innovation Areas.....</i>	5
2. MONZA.....	5
3. BACKGROUND TO THE DELIVERABLE.....	6
3.1 SUMMARY DESCRIPTION OF THE TASK.....	7
4. DESCRIPTION OF THE WORK DONE.....	7
4.1 SUMMARY OF THE ACTIVITIES UNDERTAKEN.....	7
<i>FIRST STAGE.....</i>	7
4.1.1 <i>Territorial Context.....</i>	7
4.1.2 <i>Mobility in Monza.....</i>	9
4.2 CAR SHARING IN MONZA.....	12
4.2.1 <i>History and Data about Use of Car Sharing in Monza.....</i>	12
4.2.2 <i>Activities of Communication and Marketing in Monza.....</i>	14
4.3 MAIN OUTCOMES.....	16
<i>SECOND STAGE.....</i>	16
4.3.1. <i>Towards a New Strategy of Promotion and Marketing.....</i>	16
4.3.2. <i>Monza Users and Participation.....</i>	19
4.4 PROBLEMS IDENTIFIED.....	22
4.4.1 <i>Booking System.....</i>	22
4.4.2 <i>Care and Maintenance of Vehicles.....</i>	23
4.4.3 <i>Availability and variety of cars.....</i>	23
4.4.4 <i>Parking Problems (Fines, Unavailability of Dedicated Parking Places).....</i>	23
4.4.5 <i>Communication activities.....</i>	23
4.5 MITIGATING ACTIVITIES.....	23
4.5.1 <i>Booking System.....</i>	23
4.5.2 <i>Care and Maintenance of Vehicles.....</i>	24
4.5.3 <i>Availability and Variety of Cars.....</i>	24
4.5.4 <i>Parking Problems (Fines, Unavailability of Dedicated Parking Places).....</i>	24
4.5.5 <i>Communication Activities.....</i>	24
4.6 FUTURE PLANS.....	24

1. Introduction

1.1 Background CIVITAS

CIVITAS - cleaner and better transport in cities - stands for City-VITALity-Sustainability. With the CIVITAS Initiative, the EC aims to generate a decisive breakthrough by supporting and evaluating the implementation of ambitious integrated sustainable urban transport strategies that should make a real difference for the welfare of the European citizen.

CIVITAS I started in early 2002 (within the 5th Framework Research Programme);
CIVITAS II started in early 2005 (within the 6th Framework Research Programme) and
CIVITAS PLUS started in late 2008 (within the 7th Framework Research Programme).

The objective of CIVITAS-Plus is to test and increase the understanding of the frameworks, processes and packaging required to successfully introduce bold, integrated and innovative strategies for clean and sustainable urban transport that address concerns related to energy-efficiency, transport policy and road safety, alternative fuels and the environment.

Within CIVITAS I (2002-2006) there were 19 cities clustered in 4 demonstration projects, within CIVITAS II (2005-2009) 17 cities in 4 demonstration projects, whilst within CIVITAS PLUS (2008-2012) 25 cities in 5 demonstration projects are taking part. These demonstration cities all over Europe are funded by the European Commission.

Objectives:

- to promote and implement sustainable, clean and (energy) efficient urban transport measures
- to implement integrated packages of technology and policy measures in the field of energy and transport in 8 categories of measures
- to build up critical mass and markets for innovation

Horizontal projects support the CIVITAS demonstration projects & cities by :

- Cross-site evaluation and Europe wide dissemination in co-operation with the demonstration projects
- The organisation of the annual meeting of CIVITAS Forum members
- Providing the Secretariat for the Political Advisory Committee (PAC)
- Development of policy recommendations for a long-term multiplier effect of CIVITAS

Key elements of CIVITAS

- CIVITAS is co-ordinated by cities: it is a programme “of cities for cities”
- Cities are in the heart of local public private partnerships
- Political commitment is a basic requirement
- Cities are living ‘Laboratories’ for learning and evaluating

1.2 Background ARCHIMEDES

ARCHIMEDES is an integrating project, bringing together 6 European cities to address problems and opportunities for creating environmentally sustainable, safe and energy efficient transport systems in medium sized urban areas.

The objective of ARCHIMEDES is to introduce innovative, integrated and ambitious strategies for clean, energy-efficient, sustainable urban transport to achieve significant impacts in the policy fields of energy, transport, and environmental sustainability. An ambitious blend of policy tools and measures will increase energy-efficiency in transport, provide safer and more convenient travel for all, using a higher share of clean engine technology and fuels, resulting in an enhanced urban environment (including reduced noise and air pollution). Visible and measurable impacts will result from significantly sized measures in specific innovation areas. Demonstrations of innovative transport technologies, policy measures and partnership working, combined with targeted research, will verify the best frameworks, processes and packaging required to successfully transfer the strategies to other cities.

1.3 Participant Cities

The ARCHIMEDES project focuses on activities in specific innovation areas of each city, known as the ARCHIMEDES corridor or zone (depending on shape and geography). These innovation areas extend to the peri-urban fringe and the administrative boundaries of regional authorities and neighbouring administrations.

The two Learning cities, to which experience and best-practice will be transferred, are Monza (Italy) and Ústí nad Labem (Czech Republic). The strategy for the project is to ensure that the tools and measures developed have the widest application throughout Europe, tested via the Learning Cities' activities and interaction with the Lead City partners.

1.3.1 Leading City Innovation Areas

The four Leading cities in the ARCHIMEDES project are:

- Aalborg (Denmark);
- Brighton & Hove (UK);
- Donostia-San Sebastián (Spain); and
- Iasi (Romania).

Together the Lead Cities in ARCHIMEDES cover different geographic parts of Europe. They have the full support of the relevant political representatives for the project, and are well able to implement the innovative range of demonstration activities.

The Lead Cities are joined in their local projects by a small number of key partners that show a high level of commitment to the project objectives of energy-efficient urban transportation. In all cases the public transport company features as a partner in the proposed project.

2. Monza

Monza is a city on the river Lambro, a tributary of the Po, in the Lombardy region of Italy, some 15km north-northeast of Milan. It is the third-largest city of Lombardy and the most important economic, industrial and administrative centre of the Brianza area, supporting a textile industry and a publishing trade. It is best known for its Grand Prix.

The City of Monza, with approximately 121,000 inhabitants, is located 15 km north of Milan, which is the centre of the Lombardia area. This area is one of the engines of the Italian economy; the number of companies is 58,500, i.e. a company for every 13 inhabitants.

Monza is affected by a huge amount of traffic that crosses the city to reach Milan and the highways nodes located between Monza and Milan. It is also an important node in the Railways network, crossed by routes connecting Milan with Como and Switzerland, Lecco and Sondrio, Bergamo and Brianza. "Regione Lombardia", which in the new devolution framework started in 1998, has full responsibility for establishing the Local Public Transportation System (trains, coaches and buses) and has created a new approach for urban rail routes using an approach similar to the German S-Line or Paris RER.

Monza has recently become the head of the new "Monza and Brianza" province, with approximately 750,000 inhabitants, so will gain the full range of administration functions by 2009. Plan-making responsibilities and an influence over peri-urban areas will require the city to develop new competencies.

In this context, the objective of the City of Monza in participating in CIVITAS as a Learning City is to set up an Urban Mobility System where the impact of private traffic can be reduced, creating a new mobility offer, where alternative modes become increasingly significant, leading to improvements to the urban environment and a reduction in energy consumption (and concurrent pollution).

3. Background to the Deliverable

In Monza, which has 120.000 inhabitants, about 75.000 private cars are currently registered. This leads to strong demand for parking - mainly in the central areas of the city. Recent analysis carried out in Italy shows that the average utilisation of a private car is 20 minutes per day. More people using car sharing could reduce the associated problems of pressure on roadspace and congestion.

Monza introduced a car-sharing scheme in April 2007, agreeing with the Province of Milan the commitment to introduce this new approach to urban mobility. At the moment there are three cars associated with the car-sharing service located in specific Districts of the town for a total amount of 54 private subscriptions to the service (24 Monza inhabitants and 20 people living outside Monza who also use the service when in town).

Measure 61 is aimed at implementing a marketing strategy in order to increase the awareness of this new form of car ownership and the number of car-sharing service subscriptions in the five districts of the city. The measure covers 2 tasks.

RTD TASK - Study of a marketing strategy to show advantages of car sharing:

Monza has conducted a study of barriers to the use of car sharing in order to promote the extension of car sharing in the five districts of Monza. This deliverable is the result of this task.

DEMO TASK - Car Sharing Scheme Improvements:

Monza will then issue a subcontract for specialist expertise to actually develop a marketing strategy to increase the awareness of this new form of car ownership and the

number of car-sharing service subscriptions in the five districts of the city. Monza will as part of ARCHIMEDES implement the strategy. The strategy will utilise experience from the existing, well-established Car Clubs in Aalborg and Brighton & Hove.

3.1 Summary Description of the Task

A subcontract has been issued to Car Sharing Italia, the company which is actually running the car sharing scheme in Monza, in order to identify sociological and economical characteristics of potential users of car sharing in Monza and to study a marketing strategy for the promotion and the increasing of the awareness of the service.

The methodological approach used to identify potential users has structured the study in two different stages:

- a first stage, based on a precise analysis of available data about the city of Monza concerning:
 - socio-economical characteristics of residents (private, commercial and enterprises);
 - accessibility and urban mobility;
 - times, services and quality of life in the city .
- a second stage, based on the survey of user needs via a participating approach.

4. Description of the Work Done

This section is dedicated to the detailed description of the work carried out in the Research Stage.

4.1 Summary of the Activities Undertaken

FIRST STAGE

4.1.1 Territorial Context

On January 1st 2009 Monza had 121.280 residents, with a positive and increasing natural and migratory balance. The distribution of the number of residents and the population density in the different districts of the city is depicted in the following tables (which do not take into consideration the area of the Park of Monza).

District	Residents	%
1	21.663	17.9%
2	29.553	24.4%
3	13.206	10.9%
4	33.654	27.8%
5	23.204	19.1%
<i>Total</i>	121.280	100%

District	Density (inh/km ²)
1	7.127
2	3.558
3	4.152
4	5.297
5	5.153
<i>Average</i>	5.057

In 2008 the average age of residents was 45 years and the 55,6% of the population was between 25 and 64 years old.

Available data about occupation date back to 1991. Even though not recent, they depict a qualitative picture of population characteristics.

Type of Business	Residents	%
Agriculture	198	0.4%
Industrial	21.076	40.9%
Traders/Professionals	1.386	6.6%
Self employed	2.090	9.9%
Managers/Employees	8.391	39.8%
Others (i.e. workers)	9.209	43.7%
Tertiary sector	30.252	58.7%
Traders/Professionals	3.364	11.1%
Self employed	4.126	13.6%
Managers/Employees	15.485	51.2%
Others (i.e. workers)	7.277	24.1%
<i>Total</i>	<i>51.526</i>	<i>100%</i>

To complete a first picture of the demographic and socio-economic reality of Monza, the following tables contain data about businesses according to type and sector. It is important to notice that the 2008 data present an increase of 213 businesses compared to 2007 data.

Business Type	2008
Stock companies	4.043
Partnership companies	2.715
Individual enterprises	4.493
Others	371
<i>Total</i>	<i>11.622</i>

Business Sector	2008
Manufacturing industry	2.021
Building	1.733
Trade	4.088
Services	4.693
<i>Total</i>	<i>12.535</i>

From these data it is possible to form an overall view of the city of Monza. Monza, which today is the capital city of the new Province of Monza and Brianza, has, in absolute terms, dimensions that are adequate to justify a car sharing service, especially if we consider its proximity to Milan. The distribution of residents in the city is relatively homogeneous, although District 1 presents the highest density. This high density is a first positive parameter with reference to potential demand for a car sharing service.

It is also interesting to point out that the educational degree is quite elevated: more than 31.9 of residents have completed secondary school and more than 13% have a university degree. These data, if compared with provincial and national data, show that educational degree in Monza is considerably high, as depicted in the following table:

AREA	DEGREE	SCHOOL-LEAVING DIPLOMA
Italy	7,5%	25,9%
Province of Milan	10,9%	29,9%
Province of Monza and Brianza	7.1%	28.5%
Monza	13.2%	31.9%

Monza's economic situation is important both in terms of dimensions and of characteristics. Activities in the city, which are growing in spite of the economical crisis, are strongly oriented towards commerce and the service sector. Residents of productive age are primarily engaged in individual enterprises and in managerial and employment roles.

All these characteristics support the uptake of car sharing, which typically has a stronger connection to more conscious customers, who are usually more open to new proposals; i.e. early adopters.

4.1.2 Mobility in Monza

Monza is a medium sized historical city which has today acquired metropolitan features. Each day Monza draws in a greater number of people than the number of residents who travel to conduct their business elsewhere which shows Monza's role as a mobility attractor centre and capital city of the new Province of Monza and Brianza.

The ratio between the number of inhabitants and available jobs is high when compared to the average for the province and the number of business journeys is low compared to provincial data. This means that Monza's residents have less need to leave the city for employment reasons. During the last decade a decreased level of dependency on Milan can be shown by examination of traffic flows to and from Milan.

Both these considerations demonstrate a relatively low need on the part of Monza's inhabitants to use their private vehicles for commuting, which is why car sharing can be considered a real alternative to privately-owned vehicles.

Actions proposed in the mid-term to improve mobility in Monza include the promotion of intermodality and the diffusion of an integrated Public Transport System, starting from interchange nodes and existing stations.

4.1.2.1 Modal Split

To gain an understanding of transport demand and use in the area of Monza, some important sources of information have been accessed as part of the study, including:

- Study for an Accessibility Indicator (Italian original title: "Per un Indice di Accessibilità, Studio sulla Mobilità in Brianza", Paola Pucci, Giancarlo Graci e Fabio Manfredini, DiAP Politecnico di Milano, Ed. Il Sole 24 ore, 2009);
- Origin/destination analysis carried out by Regione Lombardia (original title: "Indagine Origine/Destinazione 2002");
- Italian General Census (ISTAT, Italian National Institute for Statistics), carried out in 1991 and 2001.

These sources, which take into account changes during the past ten years, show:

- an increased number of journeys, with destinations more spread across the entire area of Brianza; this means that within the region as a whole journey

distances between the place where people live and where they work are increasing; the root cause seems to be a significant increase in the number of houses in many towns of the Brianza area, whilst locations for business are still in the larger centres, so that around 56% of employed people works outside the town where they live. (For example, Milan has lost 500.000 inhabitants in the last 20 years, who now living in the surrounding neighbourhood);

- an increased number of irregular mobility, requiring more trips at different hours of the working day and involving more than one location;
- an increased number of journeys on an East-West axis involving many towns of the Brianza area, whilst the existing infrastructures (railways, highways) were oriented in the North-South direction, so keeping the city of Milan as a reference point;
- a modal shift towards the use of private cars, because existing Public Transport facilities can't yet address the newly evolving patterns:
 - 67% of trips within Brianza are by private car,
 - 61% of trips from Brianza to external destinations are by private car,
 - 76% of trips to Brianza made by people from outside the area are by private car.

Apart from commuting and trips for education purposes (respectively 428.062 and 160.518 a day according to ISTAT data for the year 2001), journeys for personal reasons (entertainment, shopping, visits) are constantly increasing, now representing 40% of daily transfers.

These dynamics are connected to an increase in the number of trips made per day which in the province averages 2.78 trips per day for each person. This value is common to most European cities. People who make most journeys per day are between 40 and 65 years old (42%) followed by the band between 20-40 years (41%).

66% of journeys are made by car as driver and 10% as a car passenger; 8% of journeys are made by public transport and 8% on foot or by bicycle.

36% of these journeys are made for business reasons and 13% for different personal reasons (errands, shopping or entertainment).

It is important to remember that these data have been collected on a provincial basis, taking into account studies on traffic flows. More specifically, the following table shows the modal split of traffic in the city of Monza, expressed as the number of vehicles as detected on roads accessing the historical centre and on ring roads, according to data collected for the drawing up of the General Urban Traffic Plan.

Type of vehicle	Roads accessing the historical centre	Ring Roads
Cars	76,4%	82,3%
Vans	4,9%	7,3%
Lorries	0,5%	3,9%
PT Buses	2,4%	0,3%
Scoters	5,8%	4,8%
Bicycles	8,9%	0,8%

When considering trips approaching the historical centre during the working day, there are 33,7% of trips with destination historical centre, 45,6% going to other areas of the

city and 20,7% with destinations outside the city. 57% of trips originate outside the city and are directed to Monza, whilst the 42% has both origin and destination within the city. The average occupancy for private vehicles is 1,37 passengers per car.

4.1.2.2 Mobility and Quality of Life

Several studies have been dedicated to this subject, the importance of which has increased in recent years both in terms of socio-economical analysis and of media attention.

From a modern perspective, *quality of life* means not only the possibility of enjoying good health and economic welfare, but also the chance to access to information, social relationships and qualitative services in a safe and comfortable environment. It's a broad meaning of the quality of life, which shifts the attention solely from economic indicators.

From an analysis conducted by SWG (a leading Italian society for surveys) in 2006, Monza is considered a city on a human scale, which has grown up in a short period of time without an adequate growth of services. Primarily, survey respondents had a perception of a lack of organization in mobility, which represented the most critical problem for citizens because traffic was their hardest daily challenge. According to this perception of the situation, residents of Monza do not consider it essential to shift from private car to public transport at the moment, even though people declare a strong environmental sensitiveness.

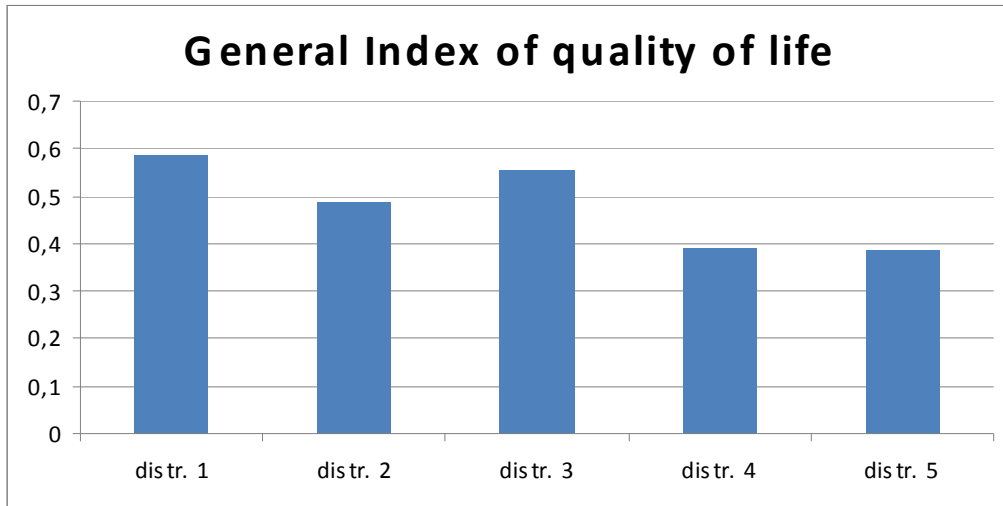
Factors which cause the major loss of time are, according to survey respondents, journeys to and from their place of work, journeys in peak hours and the search for a parking place.

People also expect that the Municipality will intervene to improve and strengthen public transport and to invest in alternative modes (bicycle, car sharing...).

In focus groups held by SWG it appears that young people are more conscious than older people about the opportunity to reduce their use of private cars in order to promote more sustainable mobility. Information is a particular issue: citizens complain about inadequate information on new initiatives about mobility, which are often disseminated by word of mouth.

Traffic is considered the main difficulty also by the majority of business people (66,7% of survey respondents), as it is a barrier to economic development and to trade in city centres.

The following table depicts the general index of quality of life in the different districts of Monza, calculated as the weighed average of several statistical indicators, from which it can be argued that the best district as for quality of life is District 1.



4.2 Car Sharing in Monza

The present chapter has the aim to frame the history and the characteristics of car sharing service in the city of Monza.

4.2.1 History and Data about Use of Car Sharing in Monza

A car sharing service in Monza was launched on May 8th 2007 with three cars: two of them were located in the historical centre, in Piazza Roma, 50 metres far from the Municipality offices, whilst the third one was in Piazza Castello, not far from the railway and bus station, which is the most important transport interchange in Monza.

The two cars located in the historical centre were used on working days and hours primarily by the bank Unicredit which had bought prepaid packages of half-exclusive use from 9,00 to 17,00 and is located adjacent to the parking place. The car in front of the station was at all citizens' disposal all day long. Obviously all cars were at all citizens' disposal during evening hours and at weekends.

The company that has provided the service since the beginning and is still running it is Car Sharing Italia, promoted by the local circle for environmental protection called Legambiente, which has been active in the Milan area since 2001 and has held the contract with the Province of Milan within the national programme called ICS (Italia Car Sharing) since 2006.

Since the beginning, some benefits have been given to the car sharing service in the city of Monza. More specifically, car sharing vehicles have been allowed to enter limited traffic zones, to use lanes reserved for public transport, to circulate during days when traffic is banned (usually because of high pollution levels) and to have free access to parking areas where it is normally necessary to pay.

A second step has been made in 2008 when the city of Monza was allowed to use a regional grant to buy packages of car sharing use to answer to mobility needs of district offices and to implement alternative mobility modes between citizens. Thanks to this opportunity, since December 2008 two new cars have been located in districts 4 and 5, close to the Municipality district offices, available for both citizens and employees during

working hours: for this reason Comune of Monza bought prepaid cards in order to allow its employees to use the service, but also aiming at guaranteeing to Car Sharing Italia the backing of maintenance costs.



Picture 1 - Monza Districts and car sharing vehicles location

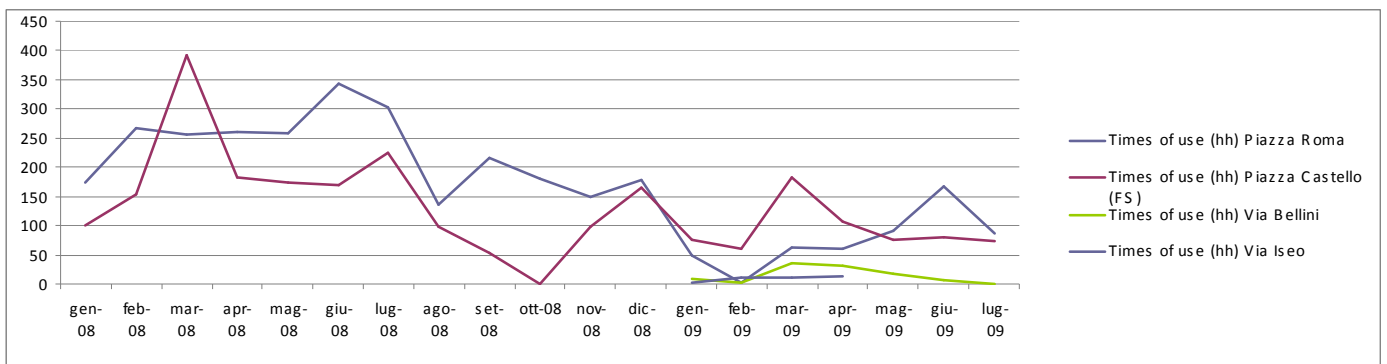
The following table shows the development of car sharing service in Monza since 2007.

	2007	2008	Jan-July 2009
Users/Active Cards	40	63	65
Number of cars	3	3	5
Available parking areas	2	2	4
Number of trips	414	769	196
Covered Km	17.038	33.603	9.894
Hours of use	2.358	4.779	1.320
km/h	7,23	7,03	7,50

From the table a decrease in use during the first months of 2009 can be seen compared with previous years, even though there was an increase of both the number of cars and parking areas. This situation, which has affected all operators in this sector, may be partially due to the recent economic crisis,

In order to offer a more complete picture, the following tables depict data about each parking area from January 2008 to July 2009.

	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Jul 08	Aug 08	Sep 08	Oct 08	Nov 08	Dec08	Jan09	Feb09	Mar09	Apr09	May 09	Jun 09	Jul 09
Times of use (hh) Piazza Roma	173	267	256	260	259	344	303	136	215	180	149	179	50	2	63	61	92	166	86
Times of use (hh) Piazza Castello (FS)	100	154	391	183	173	169	225	98	53	nd	99	165	76	60	183	108	76	80	74
Times of use (hh) Via Bellini													10	2	36	32	17	7	0
Times of use (hh) Via Iseo													2	12	12	13			



From these data it can be seen that parking areas near District offices (Via Bellini and Via Iseo) have registered very little use and that generally service, even in central areas, has come to a standstill, especially since the beginning of 2009.

A second relevant aspect is partly connected to the expiry of the convention with Unicredit Bank of Monza, which was an important customer since the beginning of the service. Unfortunately, in spite of the high satisfaction from local management, service has been interrupted under request of the central direction in Bologna as part of a company reorganization. This situation shows, on the one hand, a weakness of actual users of service, and on the other the potential importance of business customers to the scheme.

4.2.2 Activities of Communication and Marketing in Monza

Since its inception, the car sharing service in Monza has been supported by communication and marketing activities which, after considering the target characteristics and available budget, have exploited three preferred channels:

- distribution of leaflets and informative flyers;
- press releases in agreement with Comune of Monza and Province of Milan;
- events organized with the cooperation of local circle for environmental protection called Legambiente.

This approach has exploited drivers of management (coordinated image and communication campaign carried out in Milan) and of local administrations (widespread presence on the territory and institutional value).

Picture 2 - Flyer for launch of car sharing service in Monza

Questo Natale regala qualcosa di veramente nuovo. Tante auto diverse, 24h, sotto casa. Regala car sharing.

Visita il sito e contattaci: acquista il tuo pacchetto dono di utilizzi car sharing - solo per Natale alle ore che regali tu noi ne aggiungiamo altre 2!

www.carsharingitalia.com

IL CAR SHARING A ORE ALL INCLUSIVE

Cos'è?
Un autonoleggio self service sotto casa. L'auto che paghi a tempo. L'auto che prenoti con un click.

A chi è rivolto?
A chi vuole l'auto giusta al momento giusto. A chi non deve usare l'auto tutti i giorni. A chi vuole sempre il meglio delle cose.

Come funziona?
1. Acquisti il pacchetto di ore che vuoi utilizzare.
2. Prenoti l'auto che preferisci.
3. Utilizzi l'auto per le ore e i chilometri che ti sono necessari.

Quanto costa?

PACCHETTI PREPAGATI DISPONIBILI

20 ORE	30 ORE	40 ORE
100 €	150 €	200 €

TARIFFA ORARIA ALL INCLUSIVE (kasko, carburante e 30 km inclusi)*

5€

* oltre 30 km per noleggio tariffa 0,50/km

Per informazioni: www.carsharingitalia.com | 02.45475777 | |

THINK SHARING

Picture 3 - Flyer for Christmas promotion

4.3 Main Outcomes

SECOND STAGE

4.3.1. Towards a New Strategy of Promotion and Marketing

From the analysis of collected data, Comune of Monza and Car Sharing Italia have decided to base the communication strategy on people and not on ideas.

A classical marketing plan, actually, is based on the identification of some key ideas to communicate (e.g. car is not something to own, but a service to use) and on some ways to communicate them (e.g. 'if you want a glass of milk, do you buy a cow?'; suggesting that the owned car is like a cow!).

These ideas are then passed on different channels, in order to reach all targets of the campaign.

Even when the plan is conceived at a local level, it produces a communication strategy which is based on ideas, benefits and characteristics of the service, but is in any case addressed to all citizens through a press campaign, posters, flyers, TV and radio broadcasts, spread all over the territory.

The Monza marketing plan will take an alternative approach that which is based on 'market segmentation', starting from defining people who are potentially interested to car sharing service, since it is considered to be "for many people, but not for everybody", since lifestyle and mobility habits of potential users are variables which condition the interest for the service, so it is fundamental to address a more limited number of persons, who need to travel by car.

The final aim is then to understand WHO are the potential users to be addressed by the communication strategy, in order to optimize resources not paying for useless advertising but investing in improvements of the service and in aimed information. With such an approach, it is easier to model the service with its customer/user, collecting useful information regarding real needs and expectations.

This approach is aimed not only at reaching new potential users, but also at preserving faithful customers, in order to create a "hard core" of users which helps to finance the service.

4.3.1.1 SWOT Analysis

This methodology helps to define drivers and barriers of car sharing service, and opportunities and risks in the territory where the service is proposed (for instance, market characteristic), with the aim of identify the context of the chosen market. All factors may be represented in a matrix which meets different variables:

DRIVERS:

- Economical advantages
- Facilities
- No direct competition
- Highly technological system
- Automatic system and self service
24H/365days
- High flexibility
- Integrability of technology with other systems
- National interoperability

BARRIERS

- Uncertainty about car availability
- Unreliability of technological systems
- Bad conditions of cars (dirtiness, damages...)
- Lack of an Italian benchmark
- Difficulty of understanding operation and convenience of the system
- High costs of used system
- Development of medium term strategies not defined yet

OPPORTUNITIES

- Increasing care to expenses from families and business customers
- Essential plug of intermodal transport
- Facilities from public administrations
- Participation in a strong group offering "mobility"
- Favourable social and cultural context
- Care for environment

THREATS

- Less availability of alternative means of transport to private car as integration of car sharing service
- Cultural distrust towards idea of "sharing"
- Niche market

4.3.1.2 Target Identified

From the data collected in the first stage of the project, and following the SWOT analysis of car sharing service in Monza, it can be stated that also in Monza potential users are private (both young and mature people) and business (enterprises and professional).

Characteristics of private users can be compared with those of European users of car sharing and are confirmed by surveys carried out by Car Sharing Italia. Within this target there are different typologies of users, which can be divided in two different categories:

- the mature user, usually married with children, who already owns a family car but needs another one to satisfy new necessities (new job for one of the members of the family, children with new driving licence...);
- and the young user, with limited assets but an active social life, who needs a solution to his mobility needs (new house, new job...).

These two users have a common characteristic: both consider the choice of car sharing as the arrival point of a change in their lifestyle, when people need a new, preferably innovative, solution to their problems.

Other potential users are:

- businesses, which can adopt car sharing both as a substitution of part of their fleet or as a benefit for their employees or customers,
- and professionals, who can avoid buying a car by choosing car sharing. This opportunity is strongly attractive since for VAT registered professionals, owner costs for car sharing can be deducted from taxes.

In order to look more deeply into the context where these two target groups are placed, an additional set of survey results carried out by IPR Marketing Institute for Car Sharing Italia in March 2009 are helpful, as follows:

As far as private users are concerned, it was found that:

- 31% live in a limited traffic areas;
- 56% live in zones with fared parking areas;
- 25% own a garage;
- 42% park their car in the street;
- 52% do not own a car, 37% own just one;
- 35% use car every day, 28% twice or three times a week, 17% once a week;
- 12% covers 25.000 km a year, 25% from 2.500 to 10.000, 26% from 10.000 and 17.000;
- 20% use bikes for journeys, 32% use bicycle and 10% use both;
- 41% has a Public Transport pass;
- 39% use Public Transport every day.

And for business users it was found that:

- 92% are private enterprises, 8% are public administrations;
- 80% of enterprises have less than 15 employees;
- 40% is located within limited traffic areas and 76% in zones with fared parking areas;
- 40% do not own a car, 27% own just one and 19% own from 2 to 5 cars;
- 40% of fleet cover almost 10.000 km a year;
- 44% of enterprises use public transport for journeys;
- Taxis, bikes and rented cars are respectively used in 14%, 13% and 11% of situations.

4.3.1.3 Socio-economical characteristics of potential users

Socio-economic characteristics of Car Sharing Italia average users are in line with other car sharing services in Italy, Europe and North America:

- age between 35 and 45;
- high level of education;
- high income;
- middle-elevated lifestyle;
- sensitiveness to environmental problems;
- tendency to innovations
- use of Public Transport service

Among drivers to use car sharing service there can be found:

- proximity to parking areas (71,2%);
- high availability of cars (44,7%);
- low fares (30,3%);
- safety and reliability of vehicles (28,2%);
- flexibility in reservations (22,6%).

Other less important drivers are the availability of the service in other cities, limited money investment, low adhesion fares, accessibility to different car models and good maintenance of vehicles.

4.3.2. Monza Users and Participation

This section reports the needs of car sharing service users in Monza, as analyzed through a participatory methodology.

The aim is to obtain useful indications in order to orientate the service towards real needs of actual and potential users, through the analysis of drivers and barriers, possible improvements and future developments.

The methodological approach has used the following stages:

- Identification of sample user: with the help of the Municipality of Monza and through the analysis of Car Sharing Italia company database, among users who had more frequently used the service in the last three months, a small group of people available to participate to the analysis process has been individuated.
- Handing out of a questionnaire and analysis of results;
- Realization of focus group.

4.3.2.1 Questionnaires

Two different kinds of questionnaires have been used, one for actual customers and one for potential users. Both collect information about mobility habits of the sample (number of journeys divided by typology and direction, etc). These data help to better depict results of the service, by defining territorial and social context and lifestyle of the sample.

The questionnaire for customers steers analysis towards the gathering of main characteristics of the service, assigning to each of them a weight and a qualitative evaluation. This kind of approach allows, especially in utilities, to frame priorities for improvements of the offer.

The questionnaire for potential users, on the other hand, through a series of questions about habits in using the private car, allows identification of characteristics of car sharing service which could potentially replace it.

4.3.2.2. Results about Mobility Habits

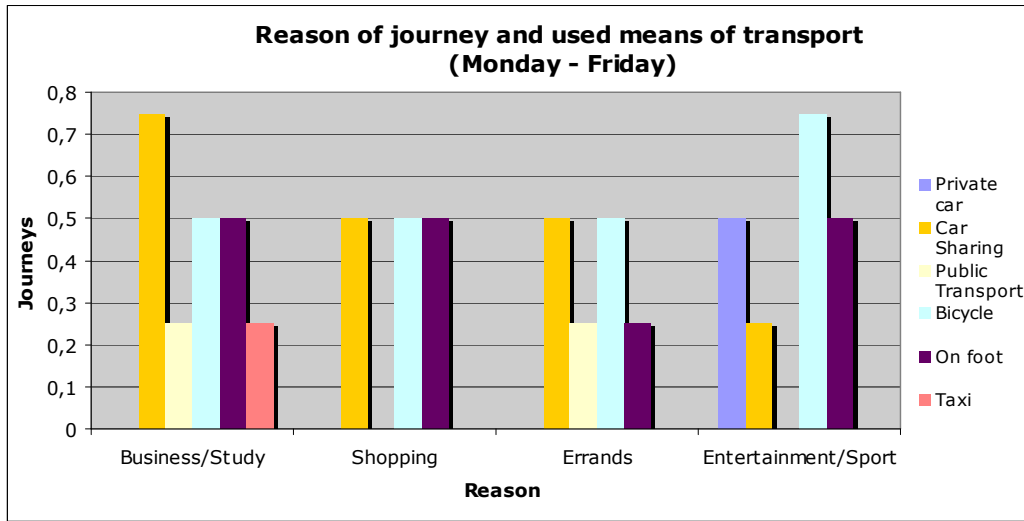
From the analysis of data collected some peculiar information is immediately evident: a good 40% of the sample own a car in their family. This data, typical of Monza (with reference to a lower value of Milan), identifies car sharing use more linked to replacing the second owned car. Another data in countertendency if compared with Milan is that none of interviewed people owns a public transport pass.

Below are summary tables, graphs and a short explanation about data related to mobility habits of the sample of actual customers and potential users, in terms of number of journeys, reasons and means of transport.

Journeys from Monday to Friday divided by reasons

	Business/Study	Shopping	Errands	Sport/Entertainment	Totals
Average	1,75	0,5	1,25	1	4,5

Journeys from Monday to Friday divided by means of transport



From these tables, it can be noticed that generally the sample of car sharing users has a quite elevated mobility. An average of 4,5 journeys a day on working days and an average of 4,25 at weekends are above average values, which identify users who have a strong mobility need and many engagements outdoors.

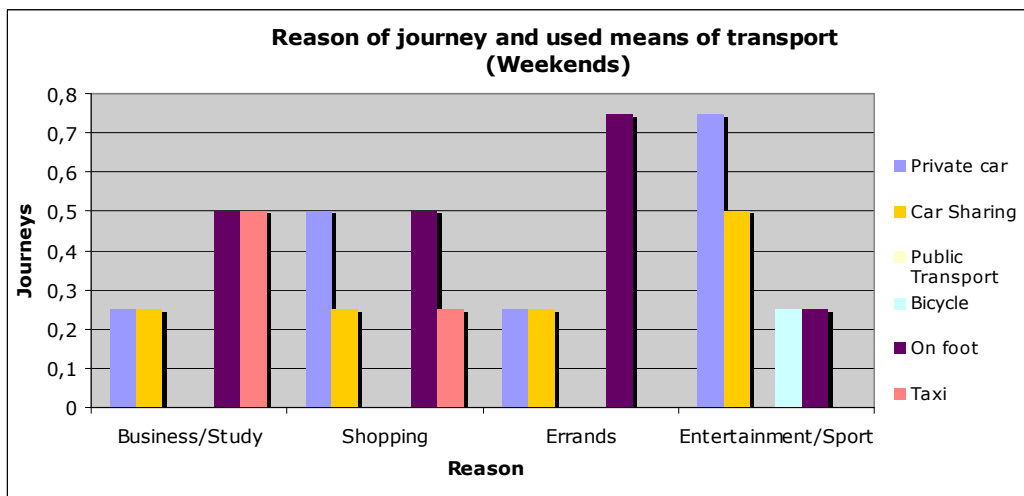
During working days journeys for business/study are predominant, even though they represent just a bit more than a third of total journeys. This data confirms the actual trend towards reducing routine journeys (home – workplace) in favour of other daily needs, like errands and social trips.

Journeys at weekends are homogeneously distributed among different reasons. It is interesting to point out outdoor journeys, mostly for free time.

Journeys at weekends divided by reasons

	Shopping	Visits	Sport/Entertainment	Outdoor	Totals
Average	1	1	1,25	1	4,25

Journeys at weekends divided by means of transport



From the graphs, it a strongly intermodal mobility can be seen, typical of car sharing users. More specifically, journeys on foot and by bicycle have an essential role in some city journeys.

The most interesting data, anyway, concerns car sharing use. During workdays, the service is mostly used for business journeys, and to a lesser degree for shopping and errands. In the evening, journeys are more connected to entertainment needs. These patterns of use are probably connected to the fact that shopping and errands are usually concentrated in the same area (the city centre), easy to reach on foot or by bicycle, whilst business journeys usually cover wider areas. Evening journeys are obviously more comfortable with car sharing if compared to other means of transport.

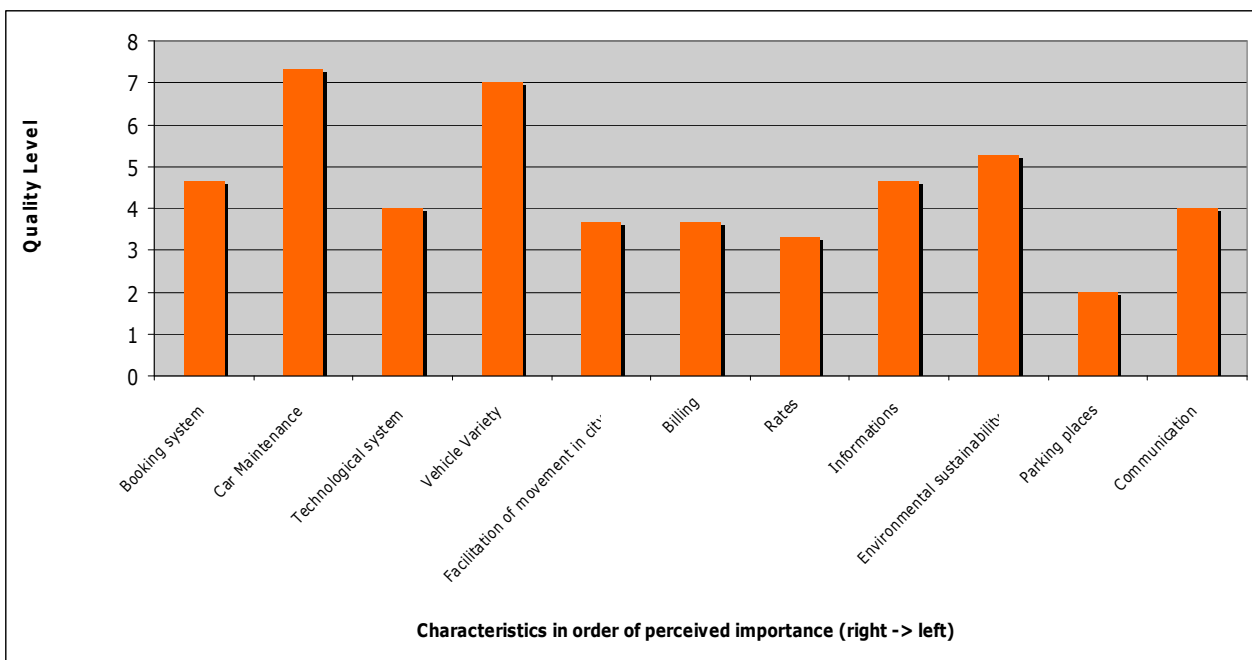
During weekends, car sharing is often used for outdoor journeys, even though for this kind of journeys private cars are also used, since car sharing frequently replaces the second family car.

4.3.2.3 Results in Terms of Service Characteristics.

From the analysis of questionnaires, it can be deduced which aspects are considered of primary importance by users. Below there are listed what interviewed people have considered the principal characteristics of service in order of importance, with the indication of the vote assigned by users from 1 (very bas) to 9 (excellent):

Characteristics	Level of Importance	Characteristics	Level of Importance
Booking system	5	Rates	3
Car Maintenance	7	Informations	5
Technological system	4	Environmental sustainability	5
Vehicle Variety	7	Accessibility to parking	2
Facilitation of movement in city	4	Communication	4
Billing	4		

Same data in a graphic representation:



Summarizing the data, it can be stated that:

- Booking system, technological system and accessibility to service have not reached a high standard of evaluation, although these elements are considered among the most important.
- Car maintenance (especially as far as cleanliness is concerned) looks adequate to users' expectations, whilst facilities, billing, rates and accessibility to parking places are below 4 and can be considered insufficient.

Some improvements like accessibility or pricing are strictly dependant from service management, whilst others like facilities and accessibility to parking places depend on the interest and intervention of local authorities.

4.4 Problems Identified

In order to identify problems which could lead to a poor level of use of the car sharing service, after the surveys, a focus group was organized for a small sample of those users who had completed the questionnaire and were willing to give their contribution to help the diffusion and improvement of the service.

From the answers given in the questionnaires, five themes were selected to be discussed during the focus group:

1. Booking system
2. Care and maintenance of vehicles
3. Availability and variety of cars
4. Parking problems (fines, unavailability of dedicated parking spaces)
5. Communication activities

For each theme a form with five questions was prepared:

1. Why do you consider it important?
2. What is actually well working?
3. What is not actually well working?
4. How should it be?
5. How could it be improved?

The discussion was coordinated for each of these themes to concentrate on the most important, specific issues. More important and debated aspects have been considered, with the aim to create a basis for the commitments which the management and the Municipality of Monza will meet in order to improve the service.

4.4.1 Booking System

The discussion focused on efficiency and efficacy of call centre and speed of website. A positive experience was registered as far as the call centre is concerned, both at the moment of booking and in case of emergencies (more specifically, in case of technological problems). Nevertheless, in some cases the technological system has proved rather unreliable, since booking has not been allowed or data have not been correctly registered.

A less important question is related to the fact that call centre works at a national level and operators often do not know the local situation and are not able to help the customer.

No criticisms have been registered about on-line booking system, apart from the frequent unavailability of vehicles which forces customers to try several times to book the car.

One of the reasons which restrains people from subscribing is that a credit card number is required and many people are reluctant to give it.

4.4.2 Care and Maintenance of Vehicles

This theme is important for all participants to the focus group. A substantial uncertainty about the quality of mechanical checks on vehicles is clear, and it is strongly related to safety, which is essential for a shared use of cars. Many potential users do not subscribe since they would like to be reassured on frequency and reliability of mechanical checks.

As far as cleanliness of vehicles is concerned, participants to the focus group complained about other people leaving cars in a bad condition.

4.4.3 Availability and variety of cars

A limited availability of models is not perceived as a problem, since users understand that bigger cars involve major costs. Some would anyway appreciate ecological vehicles (methane, hybrid...). Private customers in Monza only use cars located in their town and when no vehicle is available, they do not accept the option of traveling to a parking place in Milan: they would rather abandon the journey. Business customers, on the contrary, are more willing to use cars located elsewhere.

4.4.4 Parking Problems (Fines, Unavailability of Dedicated Parking Places)

The most difficult problem to solve seems to be that parking places reserved for car sharing vehicles are illegally occupied by other cars, so users are forced to look for another place, and, in some cases, they are fined even though they have free access to charged parking areas. The feeling is that the Local Police and auxiliaries are not informed about facilities for car sharing users.

Participants to the focus group proposed increasing the visibility of reserved parking places with bigger signs and to make car sharing vehicles more identifiable using more visible logos.

4.4.5 Communication activities

Even though Comune of Monza has started communication activities about car sharing, the feeling is that people is not informed at all about the service. Many people seem to ignore that there is an active car sharing service in Monza. It is important to act at a cultural level, stimulating people to more sustainable mobility habits. Users also think that the service should be managed by environmentally committed societies, since this can be a driver for people to subscribe.

4.5 Mitigating Activities

During the discussion in the focus group, some suggestions have been offered by participants both to Comune of Monza and to car sharing service management:

4.5.1 Booking System

A new personalized booking system is being activated which should get round this problem, since it allows to display the availability of vehicles. Customers can select their favourite parking places and the system shows whether the car is free or already booked

in the space of a day: with this system it is possible to move forward the start or the end of the request so to find an available vehicle.

It has also been requested to set up a system which allows booking through mobile phones.

4.5.2 Care and Maintenance of Vehicles

Participants suggested the creation of a blog where users can report the vehicle's conditions, since the paper log in the car is not much appreciated: often sheets or pens are missing, booking time expires and there is no time to fill in the forms, whilst the on-line system could be used at any time of the day. This system could be also useful for management to control if maintenance interventions have actually been made. Moreover, the blog could also be used to improve communication between users and management (for instance, at times it is impossible to book a car, but it's regularly parked and customers may be dissatisfied since they do not understand why they were not allowed to book it).

4.5.3 Availability and Variety of Cars

It is suggested to implement a so called "one way" system, which allows users to take a car from one parking place and to leave it somewhere else. Moreover, parking places far from the city centre are rather uncomfortable, since they are difficult to reach, whilst the centre can be reached on foot or by bicycle, so it could be useful to have more parking places in the city centre.

4.5.4 Parking Problems (Fines, Unavailability of Dedicated Parking Places)

Participants to the focus groups proposed increasing visibility of reserved parking places with bigger signs and to make car sharing vehicles more identifiable using more visible logos.

Information activity concerning facilities for car sharing must be directed at the Local Police and auxiliaries to avoid unfair fines.

4.5.5 Communication Activities

It is suggested that the Comune of Monza should insert news about car sharing in each issue of the municipality magazine. Another useful way of communicating could be Internet through social networking. The service could also be promoted in schools and libraries, in order to educate young people to sustainable mobility. Management could also print leaflets and flyers to leave in cars that could be handed out by users to other potential subscribers.

4.6 Future Plans

In view of an operational action plan, it is clear that this kind of process needs, first of all, the commitment and the cooperation of the local management together with users and local institutions.

Since the aim is to develop car sharing service, in terms of subscribers and users, through a constant implementation of the offer, it is very important to identify ameliorative measures for critical or debated aspects.

In order to draft an action plan to be easily activated, it has been decided to focus on aspects which can be modified in the short term. The priorities identified concern:

- **Maintenance/safety:** the idea of safety of vehicles is decisive for users. Cars' logs will be made accessible on line in order to allow users to verify in real time the maintenance status of vehicles and to contribute actively to improve the quality of service. Management will implement this instrument by the end of 2010.
- **Parking problems:** users have requested an intervention within the local administration in order to inform the Local Police and auxiliaries about facilities for car sharing. Offices of the Local Police will be consulted to identify their needs and criticism about dealing with daily problems concerning no-parking areas, in order to plan a training session aimed at increasing the knowledge of the service.
- **Communication:** the aim is to strengthen awareness and perception of the existence in Monza of car sharing service. Comune of Monza will insert news about car sharing in issues of the municipality magazine. Informative material, produced by the management in agreement with Comune of Monza, will be handed out in schools and libraries. The management will activate a strategy more oriented towards "good customers", offering facilities to those who will act as testimonials of the service. A new communication system will be activated, through social networking channels using Web technology (communities, forum, blogs etc.).