

共享移動交通工具未來的發展趨勢

文 | Alexander Yakovlev & Peter Otto, Ipsos

編譯 | Claire Tseng, 益普索公關行銷專員

序言

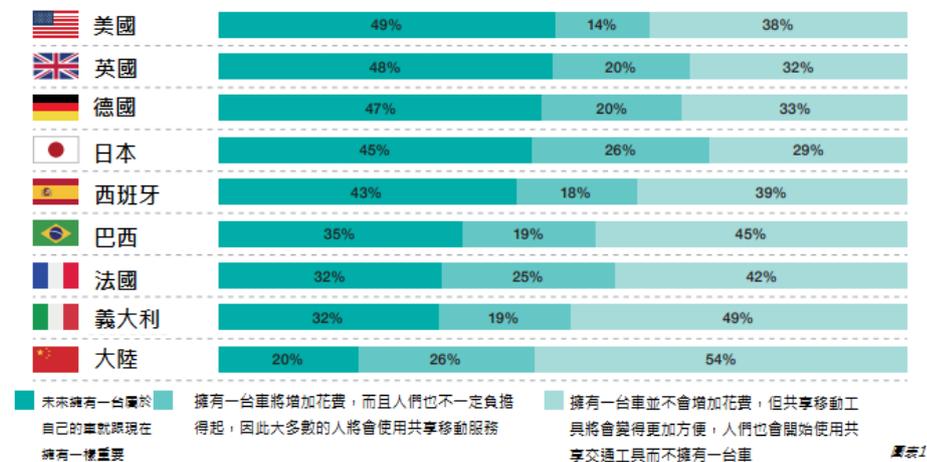
大眾運輸工具一直以來都是最常被運用的交通工具，但許多人仍然無法抗拒擁有屬於自己的車的慾望並擁有自主的行動力。

在數位浪潮中，新型態的移動服務也應運而生，如使用 app 應用程式來叫車、自由搭車(free-floating)、短暫租用他人所擁有的車(peer-to-peer car sharing)、與別人拼車(car-pooling)或是共乘(ride-sharing)。提供了除了搭乘傳統的大眾運輸，計程車或自己開車以外的新選擇。很快地，使用共享移動交通工具將會變得跟聽線上音樂一樣簡單、容易和普及。

益普索的研究指出，私家車的使用率僅僅平均每天 63 分鐘。此外，每年甚至有 67 天的時間(也就是超過 2 個月) 的時間完全沒有使用到私家車。這些加總起來總結出一個驚人的事實就是有 96% 的時間車子是閒置沒有被使用的。

因此，了解並挑戰擁有汽車背後的經濟效益正是提供移動服務的核心宗旨，而研究結果也成功地說服了許多消費者。更有超過五成的保有車主預測，未來多數人將使用共享移動服務而不打算擁有汽車，因為共享將是更經濟實惠的選擇 (圖表 1)。

人們未來想擁有車 vs. 未來使用共享移動工具



現階段的汽車共享 (car sharing) 為何呢?

汽車共享的起源可追溯到 1990 年代。基本上，汽車共享(car-sharing)屬於租賃汽車的一種模式，主要的差別在於兩點：第一是現在大多數汽車共享的供應商都沒有要求車輛必須歸還至租車站，可以直接把車停在路邊停車格便完成還車手續，第二點則是不同於傳統租車是以日計價，汽車共享服務多數按使用分鐘來計價收費。例如，就算

家離地鐵站僅有 10 分鐘路程，客戶依然可以使用共享交通工具。雖然，汽車共享類似於汽車租賃，汽車共享明顯地滿足了不同層面的需求。有 50% 的汽車共享用戶說汽車共享取代了他們自己開車，38% 取代了大眾運輸，27% 取代了計程車，取代租車的只排在第四位，僅有 22%。

近年來，越來越多的汽車製造商開始投資汽車共享的服務，並把這項服務視為一個拓展未來業務的策略。汽車共享營運商，如 Car2Go (賓士推出的共享服務)、DriveNow /Reach Now (BMW 推出的共享服務)，跟 Maven (美國通用汽車 GM 推出的共享服務) 都是由汽車製造商直營管理。更重要的是，許多與製造商有密切合作關係的夥伴，即使沒有投資汽車共享服務，也試圖在這個市場中扮演一些角色。這不單單改變了傳統的商業模式，以前汽車製造商只透過銷售和維修保養汽車來賺錢，現在也能透過提供汽車共享服務來從中獲取利益。



很快地，未來使用汽車的趨勢將變成短期租賃。

薩繆爾森, 富豪汽車(Volvo)執行長

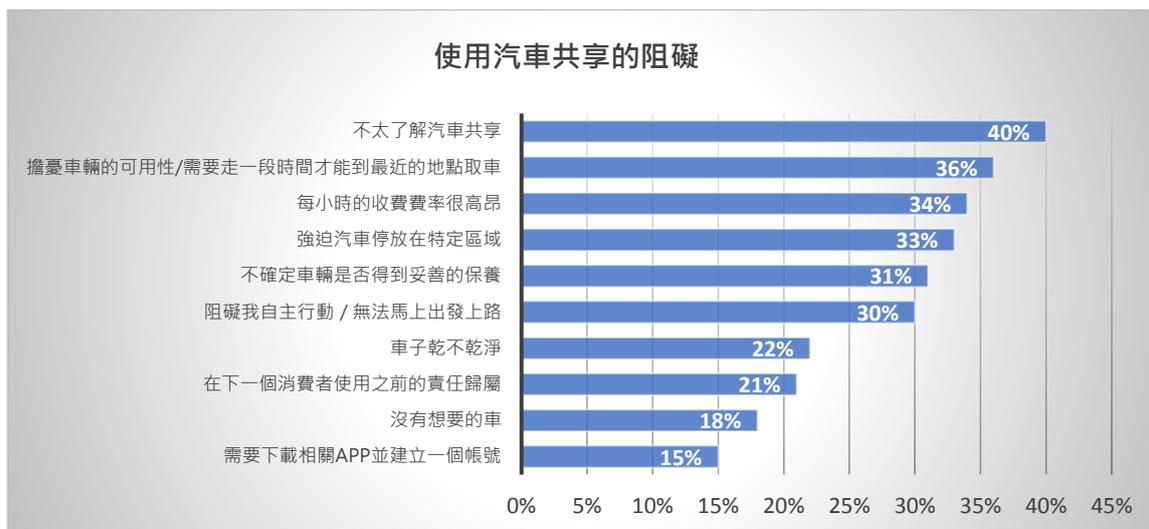
富豪汽車(Volvo)的執行長提到:「當你想擁有屬於自己的車時，你可以透過租用的方式以支付月費的方式來擁有，就如同你每個月都要支付電信費一樣。」這樣的轉變導致許多的傳統汽車原廠不再將自己定位成車輛供應商，而是將其定位改為提供移動服務的供應商。



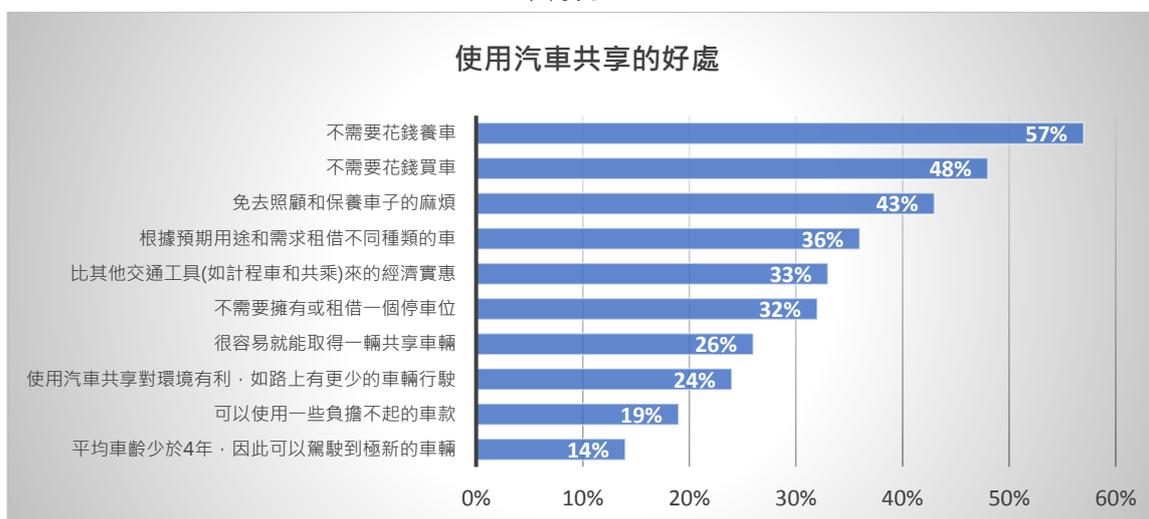
然而，目前汽車共享的使用率和普及率並沒有預期的高。僅有 2% 的車主和 4% 的非車主曾經使用過汽車共享服務。多數人對於汽車共享服務還不熟悉，不同國家對於這項服務的了解也有嚴重落差，舉例來說，法國和西班牙都只有 10% 的人了解汽車共享，日本有 36%，而義大利則有 39% 的人了解。

消費者表示，他們沒有使用汽車共享的主因，有 40% 來自不熟悉汽車共享服務和 36% 來自不容易取得汽車共享車輛 (圖表 2)。這兩個原因將隨著汽車共享服務持續地發展會自然有所改善，消費者也將明確地了解汽車共享所帶來的經濟效益與便利性，並開始密集地使用汽車共享。至於使用者認知三個汽車共享所帶來的好處，首先是 57% 不需要花錢養車，其次是 48% 認為不需要花錢買車，以及 43% 認為免去了照顧和保養汽車的麻煩 (圖表 3)。

圖表 2



圖表 3

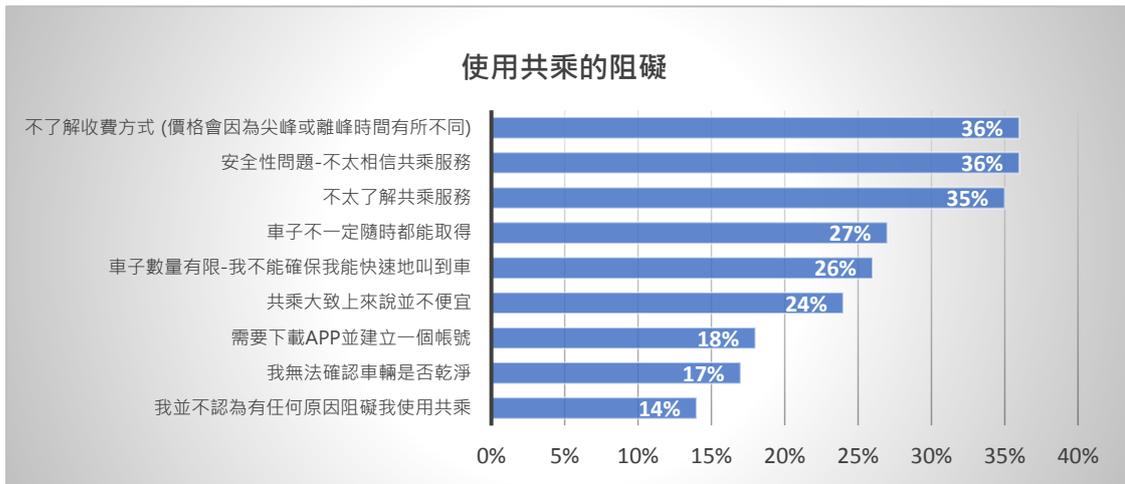


那共乘 (ride-sharing) 呢?

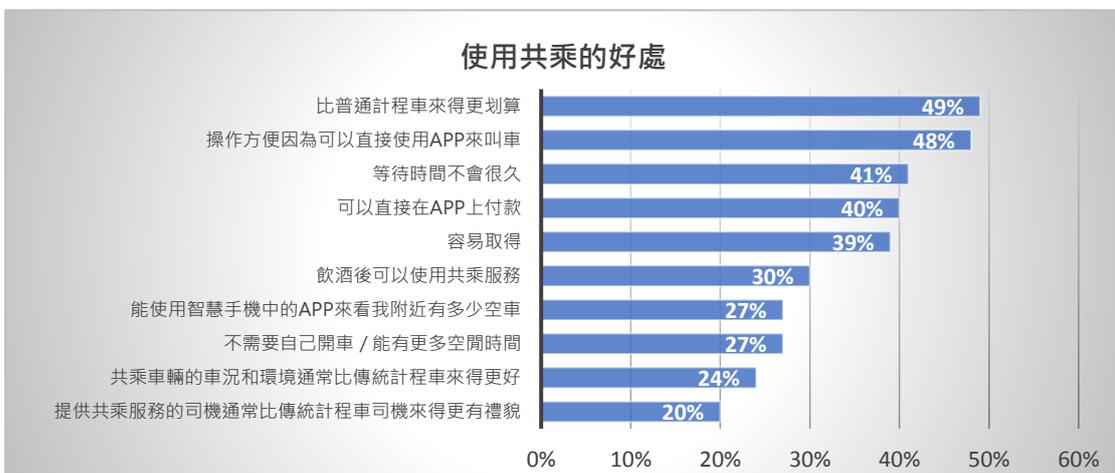
共乘基本上是一種透過 app 程式來連結駕駛者與乘客的模式。它提供類似於計程車的服務 – 由司機來駕駛而乘客則是共乘的用戶。司機在多數情況下會使用他們的私家車，因此共乘服務業者不需要擁有大型停車場，只需提供服務平台。

Uber (優步) 是其中一個最具“國際化”的共乘服務公司，實際上也是新興共乘產業中的先驅。Uber 不僅僅得到消費者廣泛的認可也有極高的辨識度 - 有 63% 的人都知道 Uber (從日本的 13% 到美國有高達 93% 的人都知道)。在共乘服務商裡，唯獨 Uber 在世界各地營運，且經常能在不同國家或城市看到 Uber 的蹤跡。其他共乘服務商都僅在單一國家或區域營運。

圖表 4



圖表 5



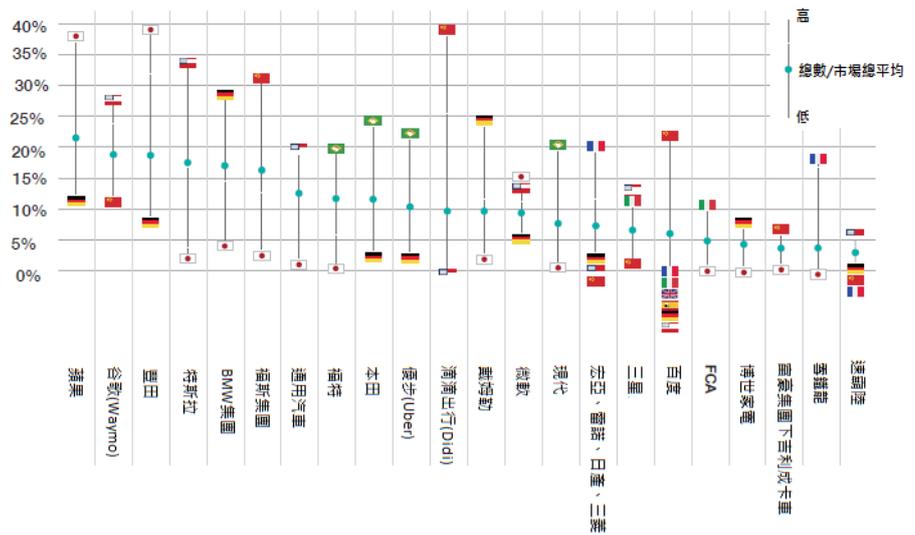
滴滴出行 (Didi) 在大陸很有名，有高達 91% 的人都知道，而 Lyft 在美國有 78% 的人知道以及 BlaBlaCar 在歐洲則有 46% 的人知道。整體來說，全球目前有數百個共乘服務商在世界各地營運。

共乘比汽車共享來得更普及，到目前為止，約有四分之一 (24%) 的消費者曾經使用過共乘服務。此外，51% 的頻繁用戶表示，他們至少每個月都用好幾次。經濟實惠、操作簡單、快速方便是共乘的三大優勢，詳細來說有 49% 的用戶覺得共乘經濟實惠、48% 認為操作簡單、41% 則認為快速方便。有趣的是，這正是傳統計程車的缺點，45% 的用戶認為傳統計程車價格不合理，38% 認為很難叫到車，以及 35% 認為他們無法掌握等待時間。因此，共乘服務商成功地克服了傳統計程車的痛點。說到共乘服務所面臨的阻礙，則有 36% 的用戶將收費方式與安全性視為主要原因，再來則是 35% 的用戶不熟悉服務 (圖表 4)。

圖表 6

在益普索“移動未來”系列的白皮書中，我們強調三個未來最主要的移動交通工具的趨勢為 – 無人駕駛的聯網汽車、電動車和共乘汽車，這三種移動模式都將緊密地連結。研究也顯示，有 28% 的消費者想要在旅行時透過共享服務來使用電動車，比起只有 7% 的消費者打算購買電動車做為私家車相比，使用共享電動車的比率明顯較高。

未來五年市場預期的移動服務提供商



未來會是由誰來提供移動服務呢?

消費者認為未來提供移動服務的兩大領導者將是 Apple 與 Google (Waymo) (圖表 6)，這代表了人們期待移動服務有更具破壞性的創新。我們也看到 Uber 在未來移動服務商中的排名落在第十名，其合作夥伴與競爭對手滴滴出行(Didi) 則是緊追在後。

交通工具的替代方案



汽車將持續作為短程或中距離最主要的移動交通工具。同時，我們也預測未來可能發展出更多更新型態的移動工具，例如類似於自駕的無人飛機，模組化膠囊的移動工具可當作汽車行駛在道路上，或可轉變為直升機，或可行駛於軌道上。即使只有 15-40% 的消費者表示他們對這些未來的交通工具僅有些許的了解，卻有 40-55% 的消費者表示如果他們有機會取得這些新型態的交通工具他們會考慮使用 (圖表 7)。

圖表 7

	英國	法國	德國	西班牙	義大利	美國	巴西	大陸	日本	總和
自駕車/全自動計程車最多可乘坐 4 人	37%	27%	38%	35%	46%	44%	48%	47%	10%	39%
自駕車/全自動巴士最多可乘坐 10 人	25%	25%	26%	26%	43%	29%	43%	37%	10%	30%
無人自駕計程飛機	15%	14%	17%	20%	33%	17%	26%	29%	8%	20%
像直升機之車輛可以行駛在路上或可當成直升機使用	11%	11%	15%	18%	29%	14%	27%	23%	7%	17%
模組化運輸系統，包含可作為車子行駛在道路上，或可轉換為直升機，或行駛於軌道上	11%	10%	12%	16%	28%	13%	21%	25%	7%	16%
超高速公共運輸工具 (如超高速管道列車 Hyperloop 以每小時 700 英里或以每小時 1000 公里的速度行駛)	22%	18%	18%	26%	35%	31%	42%	34%	8%	27%

結論

益普索的調查結果顯示，消費者已準備好接受新型態的移動服務。消費者心態的轉變將有助於支持未來快速成長的移動服務模式。

然而，政府單位將顯著地干預發展速度和產業走向。多數情況下，企業（移動服務的供應商）和政府單位的利益與目標是一致的，兩者都希望減少路上行駛的車輛數量。許多城市為支持移動交通工具的發展，提供如免費停放汽車共享車輛、電動汽車的稅收優惠、高乘載車道，允許電動汽車使用公共運輸專用道，這些都只是目前一些城市運作的實例。我們可以預期未來將會有更多與政府共同合作的成功案例。

多數人正好奇著消費者對於新概念的接受度與偏好將如何變化，這些也是益普索持續在優勢領航系列中將著重的議題。

研究方法

益普索於 2017 年 10 月使用網路調查的方式訪問了 9 個不同國家(包含美國、巴西、法國、德國、英國、義大利、西班牙、大陸和日本)的 105,000 名車主和 10,000 名非車主，並於 2018 年 1 月完成分析。所有的結果均按人口比例和停車場的規模來加權計算。

Ipsos是全球頂尖的專業市場調查研究機構，在世界各地八十九個國家設有分公司，在挖掘顧客經驗，執行品牌行銷調查，我們具有創新的思維與先進的科技。我們是世界頂尖企業執行長最信賴的企業顧問，我們也有熟悉各產業的專家協助測量、模擬和管理顧客與員工關係。

更多的資訊，請參考 <https://www.ipsos.com/en-tw/solution/overview#category3>

或洽詢我們的研究團隊

研究副總監 Johnny Huang 黃卓寧

02 2701-7278 ext.132 Johnny.Huang@ipsos.com

專案經理 Albert Chen 陳維傑

02 2701-7278 ext. 116 Albert.Chen@ipsos.com

The future of mobility – Shared Mobility

Alexander Yakovlev & Peter Otto, Ipsos

Introduction

Public transport has always been the most common means of transportation, but many people couldn't resist the lure of having their own vehicle and the prospect of full independent mobility.

In the age of digitalization, new mobility services were introduced: app-ordering services, like free-floating and peer-to-peer car-sharing, car-pooling or ride-sharing, form the modern alternatives to traditional public transport or taxis and cars. Using shared mobility might soon become as simple and common as streaming music.

Our research shows the daily use of the average private car is as little as 63 minutes per day. Furthermore, there are 67 days annually (more than two months) when the car is not used at all. All this cumulates in the fact that 96% of the time the car is just parked at a standstill.

Challenging the economic efficiency of car ownership is exactly what is at the heart of all mobility services offers. And consumers are convinced with this message. Thus, more than 50% of current car owners predict that instead of owning a car, people will use shared mobility services in future, as it will be the cheaper option (figure 1).

People's predictions to owning a car vs. using shared mobility in future

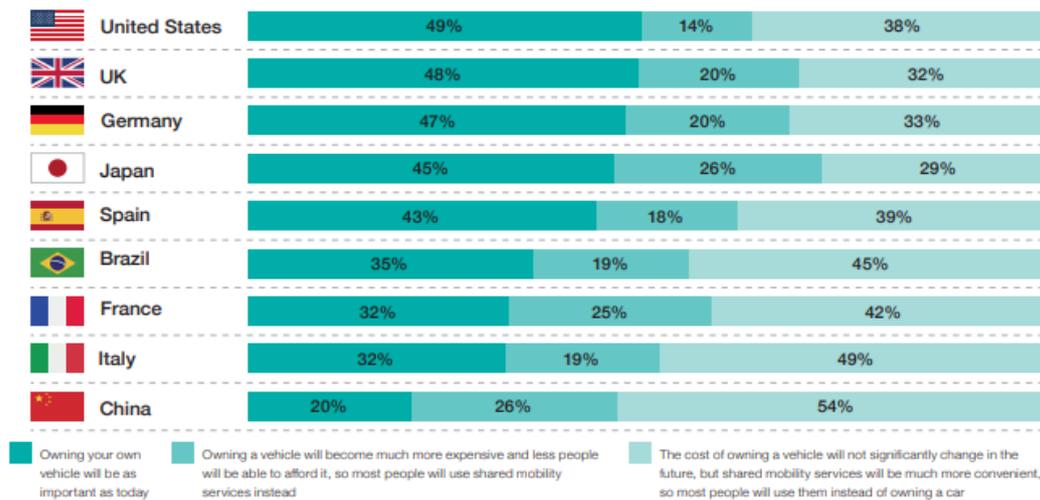


Figure 1



Where are we now with car-sharing?

The start of sustainable car-sharing development goes back to the 1990s. On a basic level, car-sharing is a form of car rental with two main differences: Most car-sharing providers nowadays do not request returning a car to a rental station - cars can be returned by just parking on the street. Secondly, car sharing services are charged by minute of use (vs. days of use in car renting). The consumer,

for example, can use car-sharing vehicles to have a 10-minute drive from a subway station to home. But, being a close relative to car-rental, car-sharing evidently fulfils different needs - users say that they use this service in cases when they previously drove their personal car (50%), followed by public transport (38%) and taxis (27%). Car-rental service is only the fourth means of transportation that was replaced by car-sharing (22%).

In recent years, more and more car manufacturers have invested in car-sharing, seeing this service as one of the strategic pillars of their future business. Thus, such leading car-sharing companies as Car2Go, DriveNow/ReachNow, Maven, are fully owned by car manufacturers. On top of that, there are many partnerships in place where OEMs tried to play a role in this segment, even without fully investing. This transformed traditional business models when car manufacturers earned money from only selling and maintaining cars – by providing car-sharing services they also earn from operating the car itself.



The most popular form of car usage in the near future will be short-term rental

Håkan Samuelsson, CEO of Volvo Cars

“When you want your own car, people will use a form of subscription, where they pay a monthly fee, like you do for a phone contract,” said Samuelsson. Such transformation leads to the fact that many traditional OEMs are no longer positioning themselves as providers of vehicles, but rather as providers of mobility.



However, current usage of car-sharing is not as intense as future predictions. Only 2% of car owners and 4% of non-car owners have ever used car-sharing. Familiarity with this service is also pretty low and significantly differs by country (from 10% both in France and Spain up 36% in Japan and 39% in Italy).

Limited knowledge about car-sharing services (40%) and low availability of car-sharing vehicles (36%) are the main barriers to using car-sharing, consumers stated (figure 2). Evidently, with further development of car-sharing services these two factors will naturally improve, opening doors to intensive car-sharing usage, based on the fact the economic efficiency and convenience of using car-sharing is clearly recognized by consumers. Thus, no car ownership costs (57%); no car purchase costs (48%); the convenience of not having to take care of the vehicle (43%) are marked as the top three benefits of using car-sharing (figure 3).

Barriers and benefits to using car-sharing

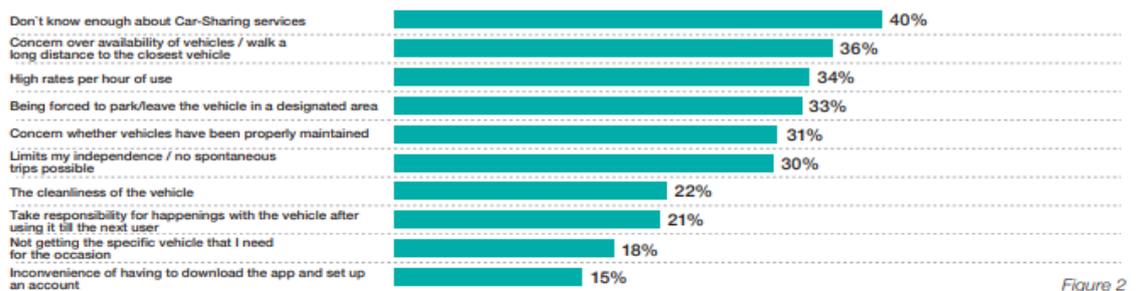


Figure 2

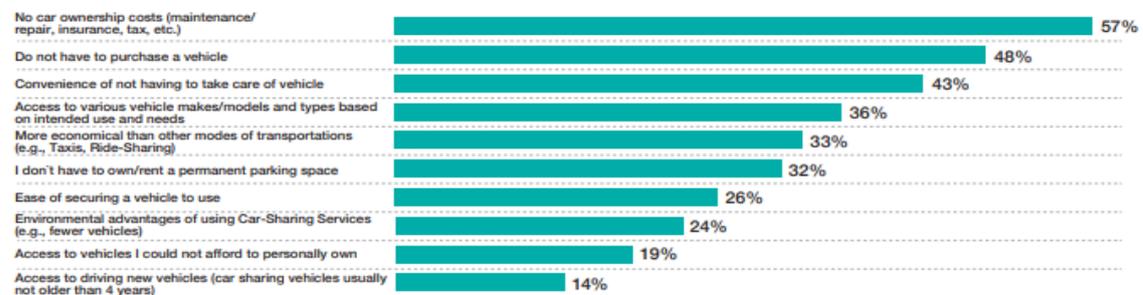


Figure 3

What about ride-sharing?

Ride-sharing/ride-hailing is an app-based service that connects drivers and riders. It provides a taxi-like type of service – ride-sharing users are passengers, who are driven by drivers and don't drive on their own. At the same time, drivers in many cases use their private cars, so ride-sharing providers do not need to own huge car parks, but rather perform as a platform provider.

One of the most "internationalized" ride-sharing companies and, in fact, the one which is at the forefront of the modern form of ride-sharing, is Uber. Uber is also well recognized by consumers – 63% are aware of it (from just 13% in Japan to 93% in the USA). But the global presence of a ride-sharing provider, such as Uber, is rather exceptional – operating in one specific region, or country, or even city, is more common.

Barriers and benefits to using ride-sharing

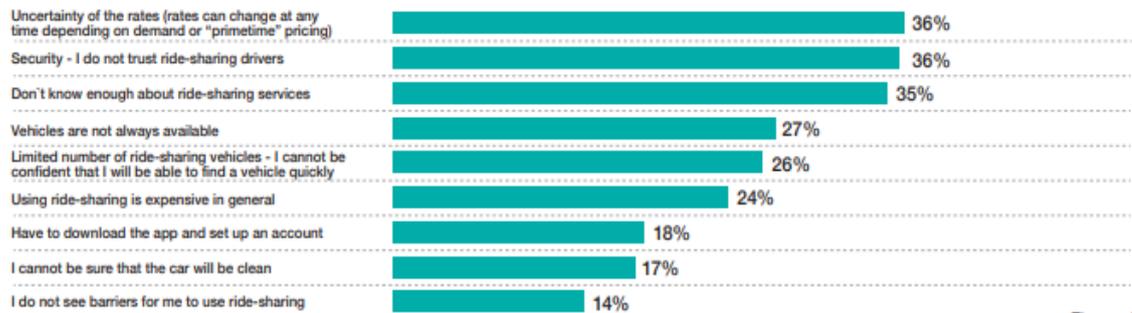


Figure 4

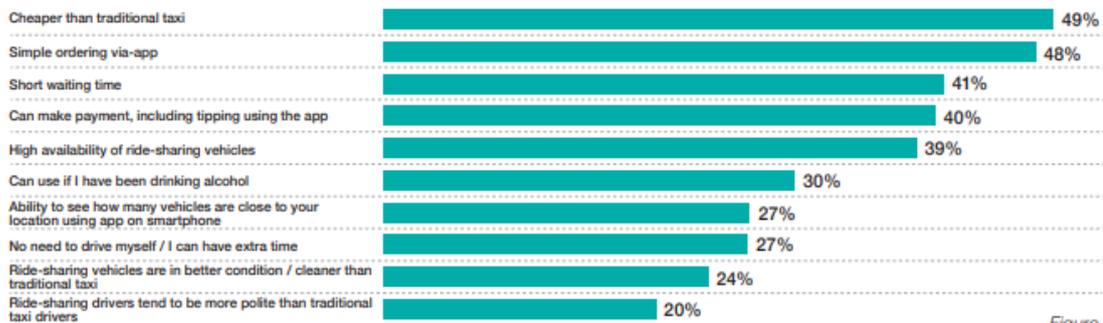


Figure 5

nowadays. Didi, for example, is very popular in China (91% awareness), Lyft in the US (78% awareness) and BlaBlaCar in Europe (46%). All in all, there are several hundred ride-sharing providers operating around the globe.

Ride-sharing services are more widespread than car-sharing – one in four (24%) consumers have used ride-sharing so far. Furthermore, 51% of these are frequent users say they use ride-sharing services a few times per month or more.

Cheap (49%), simple (48%), and fast (41%) are the top three recognized benefits of ride-sharing. Interestingly, this correlates with what is cited as the biggest disadvantages of traditional taxis – unfair cost (45%), difficult to flag down (38%), and no control of the waiting time (35%). So, ride-sharing companies successfully managed to overcome the pain points of taxi services. Speaking about the barriers of using ride-sharing itself, consumers mark uncertainty about final rate (36%), security (36%) and limited knowledge about ride-sharing services (35%), as the three main barriers (figure 4).

As highlighted in the previous White papers in The Future of Mobility series, the three main pillars of future mobility – driverless and connected cars, electrification and shared mobility – are interconnected. The current study also underlines this message, with 28% of consumers preferring to travel in an electric vehicle while using ride-sharing services. This is a significantly higher share compared to those who intend to purchase an electric car for private ownership (7%).

Expected leaders in mobility services in the next five years

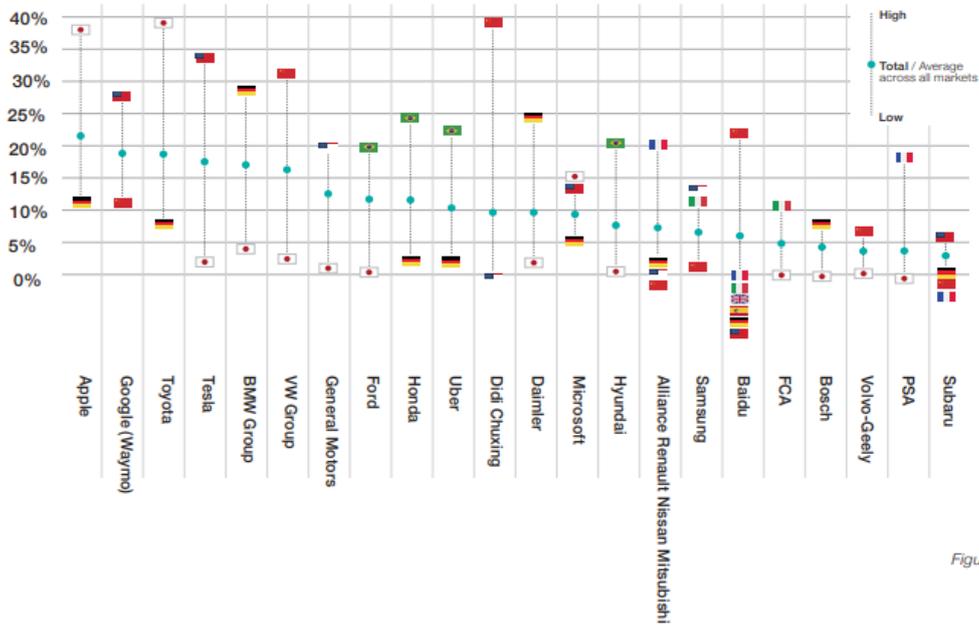


Figure 6

Who will provide mobility services in the future?

Consumers believe that the top two future mobility service leaders will be Apple and Google (Waymo) (figure 6), which shows they expect huge disruption to the way we travel. On position 10 of future leaders on shared services we see Uber, as a ride-sharing company, followed by its partner and competitor Didi.

Alternative transportation modes

Cars will continue to be the leading mode of transportation used for short/mid-distances. At the same time, we hear more and more that totally new vehicles may appear in the future, like self-flying drone taxis, or modular capsules that can be used as cars on the roads and could switch to helicopters or railway-shuttles. Even now 15-40% of consumers say they know at least a little about such means of future transportation, and even more (40-55%) would likely or strongly consider using such services whenever they are available (figure 7).



Awareness of alternative transportation modes

	UK	France	Germany	Spain	Italy	USA	Brazil	China	Japan	Total
Self-driving / fully autonomous taxi on demand with max. 4-Seaters	37%	27%	38%	35%	46%	44%	48%	47%	10%	39%
Self-driving / fully autonomous Shuttle on demand with max. 10-seaters	25%	25%	26%	26%	43%	29%	43%	37%	10%	30%
Drone-taxi - Self-flying / fully autonomous taxi	15%	14%	17%	20%	33%	17%	26%	29%	8%	20%
Helicopter-Vehicle-Cars which can be driven on streets and could be used as helicopters	11%	11%	15%	18%	29%	14%	27%	23%	7%	17%
Modular Transport Systems - fully autonomous interior capsules which can be used as cars on roads and could switch to helicopters or railway-shuttles	11%	10%	12%	16%	28%	13%	21%	25%	7%	16%
Ultra high-speed public transport (like Hyperloop traveling in 700 mph / 1000km/h)	22%	18%	18%	26%	35%	31%	42%	34%	8%	27%

Figure 7

Conclusion

Our results show consumers are ready to accept disruptive ideas in the area of transportation as a service. Just this state-of-readiness will support the fast-growing trend of shared mobility in future.

At the same time, the exact pace and direction will be significantly influenced by another player in the field – city authorities. Generally, the interests of business (mobility providers) and city authorities coincide, with both parts aiming to reduce the number of cars on the roads. Free parking for car-sharing vehicles, tax privileges for electric cars, high-occupancy vehicle lanes, allowance to use public transport lanes for electric cars: these are just a few of many vivid examples of cities supporting the development of mobility into its current form. Surely, more and more different pilots of state-business partnerships will appear.

Everyone is curious about exactly how consumer preferences - and acceptance of new ideas - will develop and it's a topic we'll continue to follow in the Ipsos Automotive Navigator Series.

Method

In wave three, Ipsos interviewed 105,000 car owners and 10,000 non-car owners across nine countries, in the Americas (USA, Brazil), in Europe (France, Germany, UK, Italy and Spain), and in Asia (China and Japan). Interviews were conducted online in October 2017 and analyzed in January 2018. All results are weighted by net population and size of car parks.

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or contact our research team:

Johnny Huang, Associate Director

02 2701-7278 ext.132 Johnny.Huang@ipsos.com

Albert Chen, Project Manager

02 2701-7278 ext.116 Albert.Chen@ipsos.com