USES, USERS AND IMPACTS OF PRIVATE HIRE SERVICES

SURVEY OF USERS OF THE UBER APPLICATION

September 2015

Study conducted by 6t-bureau de recherche

for Uber

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A survey conducted by 6t-bureau de recherche and funding by Uber

Summary of the study on the uses, users and impacts of private hire services carried out by the 6t-bureau de recherche

The need to reduce the negative external effects of automobile use on the lives of city dwellers, whether they be environmental, economic or societal, is ever more strongly felt in urban areas and constitutes a real challenge for public authorities. New transport services have developed in this context, based on the dissociation between the possession and use of private cars.

These new shared digital services are supported by digital technology and face a twofold challenge: they must respond both to a growing demand of the population and adapt to the urban environment in complementarity with the existing transport services.

Among these services, private hire services with drivers are in full development. The dissemination of mobile telephones during the 2000s, followed by the smartphone and satellite geolocation systems (GPS) since the beginning of the 2010s, have engendered an upheaval in the industry of personal transport. Thanks to smartphone applications, users are able to geolocate themselves to request rides from the nearest vehicle, without using the services of a telephone switchboard.

While the offer of private hire services is experiencing strong growth, the usage, users and impact of these services remain unknown. The objective of this study is to describe and understand them. It concerns both the transport services offered via the use of an application to connect a user with a licensed driver ("licensed transportation services") and transport services via the use of an application to connect a user with a peer-to-peer driver ("peer-to-peer transportation services").

Today, Uber is the largest operator of matching services between users and private hire services in France and Switzerland: more than on million users have used the service at least once during the last twelve months in France and French-speaking Switzerland (Uber data from 10 July 2015). For this reason, Uber constitutes an ideal base for a study of the practices relating to private hire services.

A self-administered online survey was conducted from 12 to 22 June 2015 and distributed by Uber to registered subscribers to its application. After auditing the data, the responses of 6,476 users residing in six French urban areas (Paris, Lyon, Lille, Nice, Bordeaux, Toulouse) and two Swiss urban areas (Lausanne, Geneva) were analyzed. The results were put into perspective principally with the population census data of France (INSEE, 2012) and Switzerland (OSF, 2010) and the results of a study conducted by 6t on taxi users in France in 2015.

Different users depending on the type of service used

The users of peer-to-peer transportation services are predominantly students or young employed people under 30 years old, living alone or as a couple without children and with modest incomes. They use these services above all for private reasons and look for efficiency in terms of cost/travel time. The users of licensed transportation services are older (38 years old), better educated, more affluent and are more likely to live as a couple with children. They use these services both privately and professionally and, without under-estimating the utilitarian aspect of the service, they approach it more from the point of view of comfort and convenience.

A means of transport used in the urban where the users reside and which is integrated into the existing transport offer

84% of all travel with private hire services is made in the urban area where users reside (compared with 64% for taxi travel). Forty-four percent of these journeys have a pick-up or drop-off point in the periphery of the urban area.

Users have a multimodal approach towards these services. Seventy to 93% of travel with drivers is preceded or followed by travel with another alternative to the private car: in 20% to 30% of cases on foot and in 12% to 47% of cases by public transport.

A mode that is used primarily when the alternative is less attractive

Private hire services are mainly used during the night (midnight - 8 a.m.): 37% of the journeys made with these services take place at night compared with 19% by taxi. Night travel is mainly provided by peer-to-peer transportation services, with 47% taking place after midnight, compared with 26% of the journeys with licensed drivers.

A mode that is used mainly for recreational reasons

The main reason for travel with private hire services is for recreational activities (47%), followed by links with railway stations or airports (21%). In contrast, the main reason of taxi travel concerns access to a railway station or airport (36%), followed by travel for recreational activities (20%).

A mode that is used for short trips

Almost half of the trips made with private hire services last less than 15 minutes. These short trips mostly happen during the night and for recreational activities.

On average, travel with a private hire service lasts 20 minutes for a distance of 8 kilometers. The average occupancy rate is 1.8 passengers for an average cost of €17.70 (€12.30 for travel with peer-

to-peer drivers compared with €20.50 for travel with licensed drivers and €22.50 by taxi). These amounts ensure that travel with private hire services is competitive.

A mode which inspires confidence

Information about private hire services is distributed mainly through word-of-mouth. Users have a confidence in the service that goes beyond the questions of efficiency: 53% declare that they are favorable to the idea of letting their child travel unaccompanied with a private hire service while only 38% of taxi users are favorable to letting their child travel alone in a taxi.

Among car-sharing services, the one that is most actively replacing private cars

The effects of Uber on mobility are similar to those of the Autolib' car-sharing system in the Ile-de-France region (6t, 2013). Following the adoption of car-sharing services, all modes of transport are undergoing a decrease in use, private cars and taxis in particular. However, Uber users distinguish themselves from Autolib' users in that they use cars less often, whether they be private or shared.

In the Paris area, Uber has caused a 5.4% decrease in the automobile fleet of its users. This decrease is lower than that of the fleet of Autolib users (- 23%) and Communauto users (- 67%), a return-trip car-sharing system (6t, 2013). However, in absolute terms, Uber has already eliminated more cars in the Ile-de-France region than Autolib' and Communauto combined.

Private hire services respond to a demand…

Licensed driver services satisfy a latent demand. It is not the price that is mainly highlighted by the users of these services but rather the quality of service. According to these users, the main strengths of these services with respect to taxis is the efficiency of the smartphone application and the method of payment; two assets which taxis could benefit from by strengthening the development of a similar application for their users.

…but also create a new demand, developing the market for private hire services…

Peer-to-peer transportation services are creating a new market and a new demand. The users of these services are predominantly young people and students, a target that is virtually non-existent among taxi users and not very well represented among the users of licensed transportation services. Peer-to-peer transportation services create habits of use among a young population that will massively use all private hire services when they are older.

The smartphone application has very clearly expanded the use of private hire services: on average a user makes 4,2 trips per month (compared with 2.6 among taxi users). In addition, when a private hire service is not available, the taxi option becomes an alternative for more than half the users, even if

they were not taxi users before.

... and change mobility behavior and expand the mobility of users

If 64% of the users of private hire services declare that it is the service itself (and not events of daily life) that is responsible for their change of behavior, 40% report that these services enable them to reach destinations (and therefore carry out activities) that they could not have done before. This proportion amounts to 53% for the 20% of users who do not have a driving license. Finally, for the most recent trip made with this service, 27% say that that could not have made it otherwise. It can therefore be assumed that 27% of the travel made with these services is for journeys that would not have taken place without private hire services. For the most part, these are for recreational outings (restaurant, cinema, theatre, nightclub, etc.) and mainly take place in the evening. They therefore have a direct impact on economic activity, while limiting the number of road accidents that can be related to nightlife.

Contents

Introduction

The dissemination of mobile telephones during the 2000s, followed by the smartphone and satellite geolocation systems (GPS) since the beginning of the 2010s, have engendered an upheaval in the industry of personal transport. Thanks to smartphone applications, users are able to geolocate themselves to request rides from the nearest vehicle, without the use of a telephone switchboard, which enables both the reduction of empty travel time for drivers and waiting time for passengers. Meanwhile, in France, the law for the development and modernization of tourist services of 2009 rehabilitated small car hire by introducing the notion of *voitures de tourisme avec chauffeur* (VTC - private hire vehicles or PHV) and authorized to use of matching applications.

Traditionally, taxis have held the monopoly of the means of transport that can be hailed in the street. Alongside this market there is another market for pre-booked travel. Since the 17th century, in France, one can distinguish between "taxi cabs" equipped with a meter, which alone have the right to take on passengers while "roaming" the street or in "stations", and "car hire", which is booked in advance (Darbera, 2009). However, in the 1970s, taxi cabs exerted pressure to ban radiotelephones from hired cars, eventually causing them to disappear (Pasqua act of 1977).

Thanks to the development of matching applications with licensed drivers, the growth of the PHV market has crystallized the tensions with taxis who do not want to lose the market of pre-booked travel and who accuse the PHVs of carrying out "electronic roaming" in competition with their own applications (Ecab, TaxiLoc, etc.). Faced with this pressure from the taxi lobbies, the Thevenoud Act, whose implementing order was published on 30 December 2014, constrained the PHV sector, now known as "*voitures de transport avec chauffeur*", with respect to the use of these applications.

Alongside the applications that offer to connect users with licensed drivers, matching applications with peer-to-peer drivers are developing. They allow an individual possessing a car to offer transportation services, such as uberPOP or Heetch. On 3 July 2015, Uber decided to appease the situation and suspend uberPOP[1], while waiting for the decision that the Constitutional Council[2] must make before 30 September 2015. The uberPOP option is therefore no longer visible on the Uber application today.

[1] This decision is the result of many incidents. Indeed, in the past weeks, uberPOP drivers and passengers have been victims of what has been sometimes violent intimidation and aggression on the part of an uncontrolled minority of individuals. Uber does not wish to put uberPOP drivers and passengers at the slightest risk.

[2] Article L. 3124-13 of the code of transport condemns the fact of organising a system for matching customers with persons who engage in the activities mentioned in article L. 3120-1 (i.e. road transport of persons for payment) and who are not declared transport providers. This provision is implicitly aimed at the uberPOP system. Uber has posed a priority question of constitutionality which has just been submitted to the Constitutional Council (decision of 23 June 2015).

Objectives and methods

In order to better understand mobility behaviors, 6t-bureau de recherche has conducted several studies on sharing mobility. The French environment and energy management Agency (ADEME) certified all these studies on carsharing and carpooling (6t, 2013; 6t, 2014; ADEME-6t, 2015a; ADEME-6t, 2015b). But private hire vehicle services haven't been surveyed. In this context, 6t offered Uber to fund a survey on the users of its survey. The methodology used for this work is similar to the one used for the previous surveys. 6t has undertaken the survey independently, except for sending out the questionnaire, which was attributed to Uber.

The purpose of this study is to understand the mobility behavior of the users of these applications. The study is interested both in the users of matching applications with licensed drivers such as uberX, BERLINE, AlloCab, LeCab, or Chauffeur Privé and the users of matching applications with peer-to-peer drivers, like uberPOP, Heetch or Djump.

The choice was made to study subscribers to the Uber application because it is the matching application with licensed and peer-to-peer drivers which counts the greatest number of users. According to Uber data from 10 July 2015, more than one million users have used the service at least once during the last twelve months in France and French-speaking Switzerland.

The survey was distributed by email to the persons registered with the Uber application, from 12 to June 22, 2015, in eight urban areas of France and Switzerland: Paris, Lyon, Lille, Nice, Toulouse, Bordeaux, Geneva and Lausanne.

The questionnaire was self-administered online. It required approximately a dozen minutes to complete the survey. It included questions on the socio-demographic profile of the respondents, their ownership of modes of transport, their opinion on the modes, the travel that they carry out via these applications and the evolution of their mobility habits. The respondents had to describe precisely the most recent journey that they had carried out using one of these applications (see Annex 1).

6,984 people responded to the entire survey. After auditing the data base and the removal of inconsistent responses, 6,963 respondents were retained. All of these 6,963 respondents are subscribers to the Uber application:

- 6,476 had already used the Uber application and in some cases another application;
- 236 had never used the Uber application but had already used another application;
- 251 had never used a matching application.

The analyses presented in this study are based on the sample of 6,476 respondents who had already used the Uber application in France and Switzerland. The large size[3] of this sample

[3] The sample represents 0.6 % of the 1,026,373 people who have used the Uber application at least once during the past 12 months in France and in Switzerland (source: Uber on 10 July 2015).

allows us to draw conclusions that are representative of the mobility behavior of users not only of the Uber application but also of the whole range of matching applications that are available in the main urban areas of France and Switzerland.

For the sake of readability, we will designate the "transport services offered via the use of a matching application with a licensed driver" by "**licensed transportation services**". In the case of applications of contact with a peer-to-peer driver, we will use the term "**peer-to-peer transportation services**".

In order to facilitate the readability of the tables and graphs presented in this report, we propose the following figure as an example:

Figure 1: Key to understanding the tables and graphs - an example

	A man	A woman	Total
Licensed	716	459	1175
Peer-to-peer	720	722	1442
Both	2076	1783	3859
Total	**3512**	**2964**	**6476**

p = **<0.01** ; Khi2 = **32.32** ; dof = **2** (**VS**)

Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

The table and the graph correspond to the intersection of two variables: in rows, a variable indicates whether the respondent used "licensed transportation services", or "peer-to-peer transportation services" or both; in the columns, a variable indicates the sex of the respondents ("men", "women").

The table presents the numbers. Among the 1,175 respondents using only licensed transportation services, 716 are men and 459 are women. The graph reflects the table as a percentage: thus, 61% of the users of licensed transportation services are men and 39% are women.

The figures highlighted in blue indicate the subpopulations that are significantly overrepresented: thus, in relation to the rest of the respondents, men using only licensed transportation services are significantly overrepresented. Conversely, the figures highlighted in

pink indicate the subpopulations that are significantly underrepresented: thus, in relation to the rest of the respondents, men using only peer-to-peer transportation services are significantly underrepresented.

Statistical tests are used to verify the significance of the relationships observed when intersecting two variables. When a relationship between two variables is considered as significant, this means that one of the two variables has an influence on the other.

- For intersections between two nominal variables (when respondents are asked to choose one or more of the proposed answers), the "Khi 2" test is used.
- For intersections between a nominal variable and a numeric variable (when the respondents are asked to indicate a figure or a number), the "Fisher" test is used.
- For intersections between two numerical variables, the calculation of the correlation coefficient is used.

All of these tests were performed automatically by the Sphinx software used for these analyses. For intersections including nominal variables, the overrepresented elements are indicated in blue, and the underrepresented elements in pink.

The software used distinguishes between four levels of significance in the relationships analyzed. For each type of test, the bounds between these levels are explained in the table below.

Figure 2: Thresholds adopted for the significance tests of the intersection of variables

	« Very significant » (VS)	« Significant » (S)	« Little significance » (LS)	« Not significant » (NS)
Khi 2	$p < 0,01$	$0,01 \leqslant p < 0,05$	$0,05 \leqslant p < 0,15$	$0,15 \leqslant p$
Fischer	$p < 0,01$	$0,01 \leqslant p < 0,05$	$0,05 \leqslant p < 0,15$	$0,15 \leqslant p$
Correlation coefficient	$r > 0,8$	$0,8 \geqslant r > 0,6$	$0,6 \geqslant r > 0,4$	$0,4 \geqslant r$

Source: 6t-bureau de recherche, 2015

The label "VS" below the table used in the example indicates that the Khi 2 test is very significant, in the sense that one can reject the hypothesis that the two intersected variables (sex and the type of service used) are independent with a probability of at least 99.9%. This probability is calculated by the operation 1 - p and the p-value is strictly less than 0.01 in the example used. This p-value is determined by cross-referencing the degree of freedom ("ddl") and the resulting value of the Khi 2 test ("Khi2").

Organization of the report

The first part of the report is devoted to the identification of the profile of the users of these services and the uses they make of them. Is there a typical socio-economic profile of the Uber user in France and Switzerland? Or are there any differences depending on the urban areas and the types of services available (with peer-to-peer drivers or not)? What types of journeys are made with these services?

The second part deals with understanding the choice of the mode: what leads the respondents to use these services and why do they use them? We look at whether the reasons for use and the motivations are the same depending on the urban area and the types of service available. We conclude with the modal profile of users.

Finally, the last part is devoted to the impacts of these services, in terms of both environment and mobility. Do these services entail a change in the behavior of users, causing a decline in the use of automobiles or even motorized travel? Do these services create mobility and thus economic activity? Do they participate towards opening up certain isolated territories?

The results of the study will be put into perspective with data from the population census of France (INSEE, 2012) and Switzerland (OSF, 2010) and the results of studies conducted by 6t-bureau de recherche on taxi users (6t, 2015) and on the users of return-trip and single-trip car-sharing services[4] (6t, 213), including Autolib' users (6t, 2014)[5].

[4] Carsharing is a system of car hire, usually in urban areas, which allows users to use vehicles an ad hoc basis with or without booking. In the return-trip system, the vehicle is returned to the pick-up station. In the single-trip system, the vehicle can be left in a station other than that of the pick-up station.

[5] 6t-bureau de recherche, 2015, *Usages et usagers du taxi en France*, Panel 6t ; 6t-bureau de recherche, 2013, *Enquête Nationale sur l'Autopartage : l'autopartage comme déclencheur d'une mobilité alternative à la voiture particulière*, 6t-bureau de recherche ; 6t-bureau de recherche, 2014, *Enquête sur l'autopartage en trace directe*, 6t-bureau de recherche with the support of ADEME.

1. Understanding the users and their usage

1.1. PROFILE OF THE USERS

General characteristics of the users of private hire services

A majority of men who are quite young with no children

The distribution by sex shows a slight overrepresentation of men[6] in the sample since they account for 54% of the users while they only represent 48% and 49% of individuals in France and Switzerland, respectively.

Figure 3: Distribution of Uber users by sex

Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

In the urban areas studied, private hire services predominantly attract the young: the average age of users is around 32. **18-25 year olds represent more than half of the sample (55%)** and 30-44 year olds nearly one third (29%): these categories are particularly overrepresented in relation to the French and Swiss populations where the 15-29 year-old age group represents 18% and the 30-44 year-old age group represent 20 and 18%, respectively[7]. The proportion of those over 45 is lower (19%) while they represent 43% of the French population and 50% of the Swiss population.

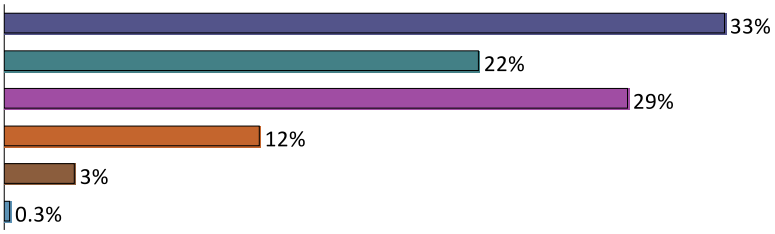
[6] This slight overrepresentation of men can be explained in part by a rate of possession of smartphones that is higher among men (49 %) than women (43 %), according to the report of the CREDOC entitled *La diffusion des technologies de l'information et de la communication dans la société française,* November 2014, p. 51. However, we observe that the gap has decreased in the last two years. It can be assumed that the distribution of users of private hire services by sex will tend to balance itself within the next few years. This overrepresentation of men may also be due to the fact that these latter were more likely than women to undertake professional travel (see figure 15 in particular, where there is an overrepresentation of men for licensed transportation services).

[7]Note that the percentages of users' age categories are calculated from individuals aged over 18, whereas the national percentages cover the entire population, including the under-18s. The overrepresentation of the 30-44 age group year old should thus be relativized.

Figure 4: Distribution of Uber users by age

Mean = **31.77** Median = **28.00** Std deviation = **11.93**
Min = **18** Max = **92**

	Nbr	IC
Less than 25	**2167**	**33% < f < 34%**
From 25 to 29	**1427**	**21% < f < 23%**
From 30 to 44	**1877**	**28% < f < 30%**
From 45 to 59	**770**	**11% < f < 12%**
From 60 to 74	**215**	**3% < f < 4%**
75 and more	**20**	**0.2% < f < 0.4%**
Total	**6476**	

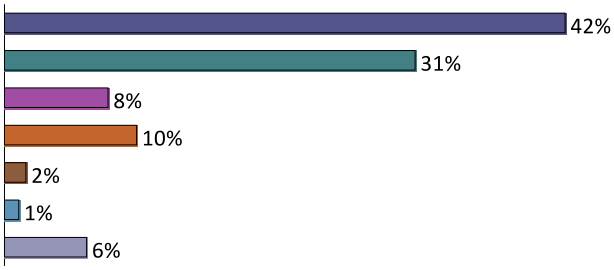


Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

The respondents live in households of two persons on average. **The proportion of respondents living alone is large (42%), as is that of couples without children (31%).** In France, households of persons living alone or as a couple without children make up 51% of the total: they are thus overrepresented in the sample.

Figure 5: Distribution of Uber users by household composition

	Nbr	IC
Alone	**2731**	**41% < f < 43%**
As a couple without children	**2006**	**30% < f < 32%**
As a couple with one child	**506**	**7% < f < 8%**
As a couple with several children	**649**	**9% < f < 11%**
Alone with a child	**107**	**1% < f < 2%**
Alone with several children	**70**	**0.9% < f < 1%**
Other	**407**	**6% < f < 7%**
Total	**6476**	



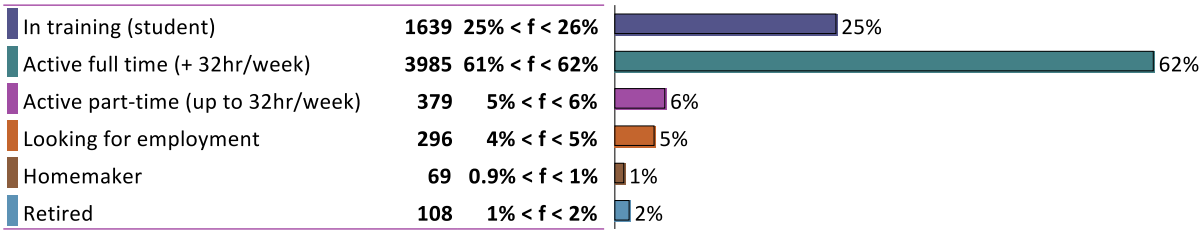
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

A large majority of highly qualified employed persons, a quarter of whom are students

Full-time employed persons are strongly represented (62% of users, whereas all employed persons - both full time and part time - constitute 63% of the population in France), but a quarter of the sample consists of students (25%), which is considerably higher than the proportion of students in France (10%). In contrast, retirees are very poorly represented among the users (1% although they represent 25% of the French population).

Figure 6: Distribution of Uber users by activity

	Nbr	IC
In training (student)	1639	25% < f < 26%
Active full time (+ 32hr/week)	3985	61% < f < 62%
Active part-time (up to 32hr/week)	379	5% < f < 6%
Looking for employment	296	4% < f < 5%
Homemaker	69	0.9% < f < 1%
Retired	108	1% < f < 2%
Total	**6476**	

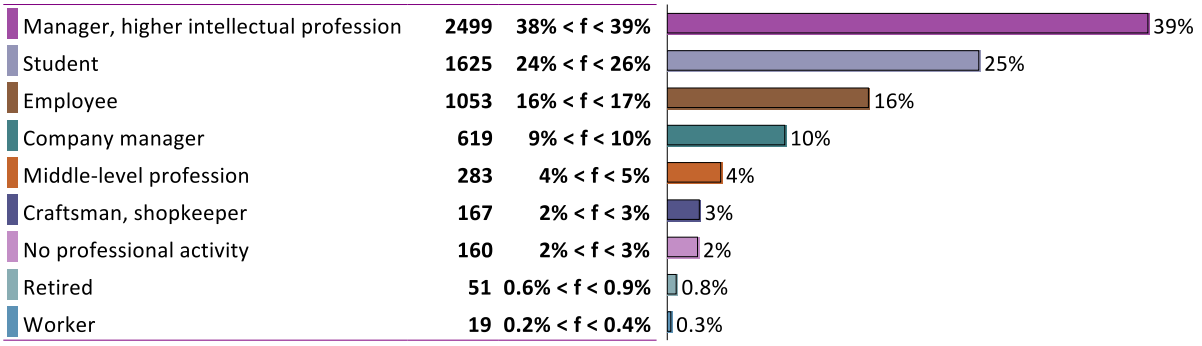


Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Users belong mainly to the category of management and higher intellectual professions (39%). They tend to be overrepresented among Uber users. This category represents only 16% of the population over the age of 15 in the studied agglomerations (and 24% of the population of the core cities of these agglomerations and 9% of the French population). Different is the situation for the employees. They are well represented (16%), reflecting their proportion in the French population of persons over the age of 15 (16%), but this is not the case of workers, who are virtually absent from the sample (0.3%) even though they represent 12% of the French population.

Figure 7: Distribution of Uber users by socio-professional category

	Nbr	IC
Manager, higher intellectual profession	2499	38% < f < 39%
Student	1625	24% < f < 26%
Employee	1053	16% < f < 17%
Company manager	619	9% < f < 10%
Middle-level profession	283	4% < f < 5%
Craftsman, shopkeeper	167	2% < f < 3%
No professional activity	160	2% < f < 3%
Retired	51	0.6% < f < 0.9%
Worker	19	0.2% < f < 0.4%
Total	**6476**	

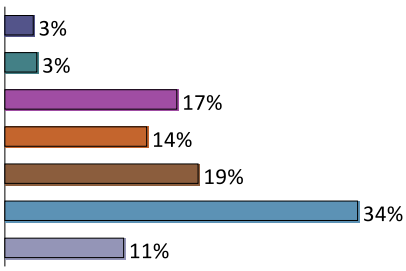


Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

The number of users holding higher-level degrees is consistent with their socio-professional distribution: one third of them hold a 5-year university degree and 11% hold a degree beyond a 5-year degree. Users who have shorter university degrees (up to 3 years of university) represent another third of the sample. 23% of the sample hold a high school diploma or lower.

Figure 8: Distribution of Uber users by university degree

	Nbr	IC
No diploma	176	2% < f < 3%
BEP/CAP (vocational training certificate) or equivalent	204	3% < f < 3%
Baccalauréat (high school diploma) or equivalent	1076	16% < f < 17%
2 years of university (technical degree, etc.)	886	13% < f < 14%
3 years of university (B.A., etc.)	1204	18% < f < 19%
5 years of university (M.A., etc.)	2188	33% < f < 35%
More than 5 years of university (specialised M.A., PhD)	742	11% < f < 12%
Total	**6476**	

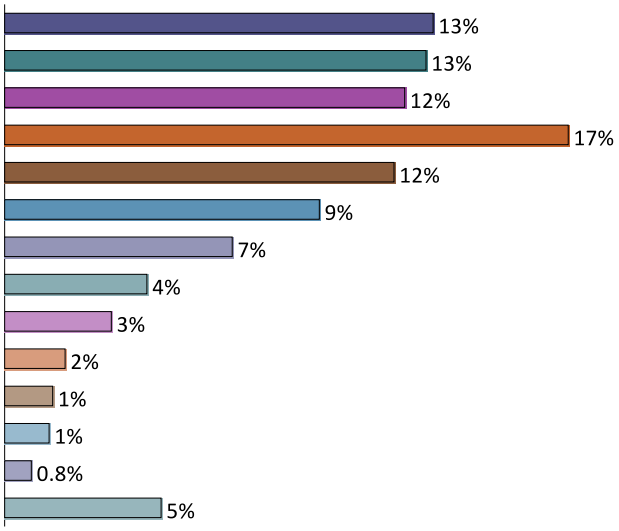


Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Among the 67% of users who reside in France and who agreed to declare their net household income, 26% belong to a household whose income does not exceed €1,500 per month. In view of the distribution of users by socio-professional category, the **large proportion of low income users is certainly the result of the high proportion of students in the sample.** The latter mainly consist of one-person households.

Figure 9: Distribution of Uber users by household income in France

	Nbr	% cit.	IC
Less than 900	561	13%	12% < f < 14%
From 901 to 1,500	552	13%	12% < f < 13%
From 1,501 to 2,000	524	12%	11% < f < 13%
From 2,001 to 3,000	736	17%	16% < f < 18%
From 3,001 to 4,000	509	12%	11% < f < 12%
From 4,001 to 5,000	413	9%	9% < f < 10%
From 5,001 to 6,000	299	7%	6% < f < 7%
From 6,001 to 7,000	186	4%	4% < f < 5%
From 7,001 to 8,000	141	3%	3% < f < 4%
From 8,001 to 9,000	80	2%	2% < f < 2%
From 9,001 to 10,001	65	1%	1% < f < 2%
From 10,001 to 11,000	60	1%	1% < f < 2%
From 11,001 to 12,000	37	0.8%	0.6% < f < 1%
12,001 or more	206	5%	4% < f < 5%
Total	**4369**	**100%**	



Source: 6t-bureau de recherche, 2015, sub-sample of 4,369 respondents in France having already used Uber and having agreed to declare their income.

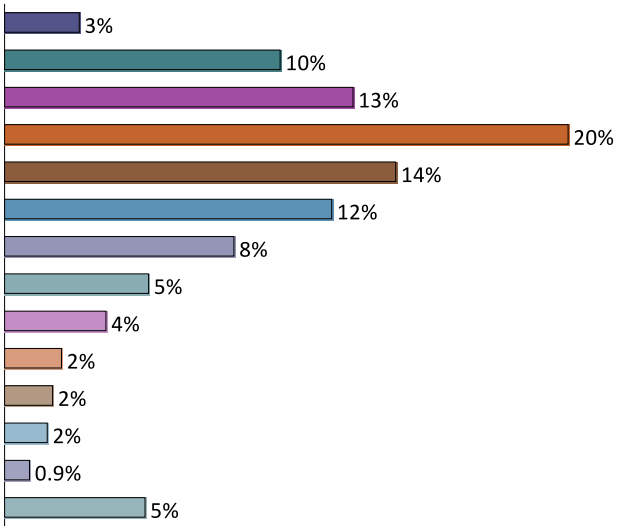
If one considers the number of users excluding the student population, we observe a decrease in the share of lower incomes (less than €900 per month) from 13% for the entire sample to 3%

for the sample excluding students.

The net monthly income of the average household for the entire population is between €2,001 and €3,000 net per month. If we eliminate the student population, it is between €3,001 and €4,000 net per month. In France, the median monthly income (excluding the student population) is €2,444[8]. **The income of the users of private hire services excluding the student population is higher than the average in France.**

Figure 10: Distribution of Uber users excluding students by household income in France

	Nbr	% cit.	IC
Less than 900	**90**	**3%**	**2% < f < 3%**
From 901 to 1,500	**328**	**10%**	**9% < f < 11%**
From 1,501 to 2,000	**415**	**13%**	**12% < f < 13%**
From 2,001 to 3,000	**670**	**20%**	**19% < f < 21%**
From 3,001 to 4,000	**466**	**14%**	**13% < f < 15%**
From 4,001 to 5,000	**389**	**12%**	**11% < f < 13%**
From 5,001 to 6,000	**274**	**8%**	**8% < f < 9%**
From 6,001 to 7,000	**172**	**5%**	**5% < f < 6%**
From 7,001 to 8,000	**121**	**4%**	**3% < f < 4%**
From 8,001 to 9,000	**69**	**2%**	**2% < f < 2%**
From 9,001 to 10,001	**58**	**2%**	**1% < f < 2%**
From 10,001 to 11,000	**51**	**2%**	**1% < f < 2%**
From 11,001 to 12,000	**30**	**0.9%**	**0.7% < f < 1%**
12,001 or more	**169**	**5%**	**5% < f < 6%**
Total	**3302**	**100%**	



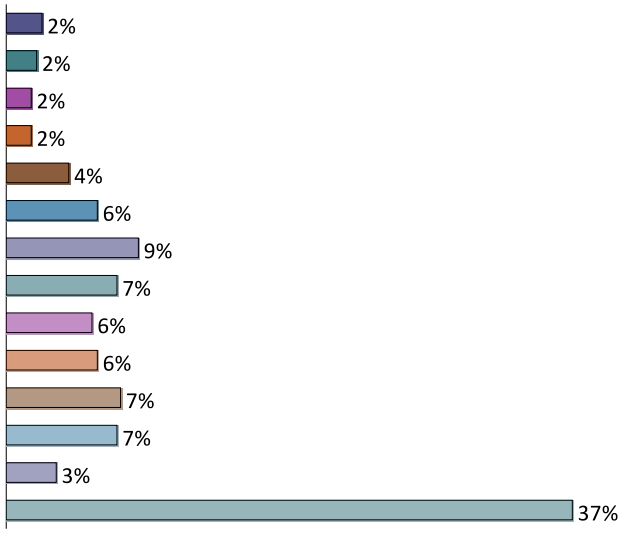
Source: 6t-bureau de recherche, 2015, sub-sample of 3,302 non-student respondents in France having already used Uber and having agreed to declare their income.

Among the 69% of respondents residing in Switzerland who agreed to indicate the net monthly income of their household, 37% have an income over 12,000 Swiss francs (CHF) per month. The median net monthly income of the household is between CHF9,001 and CHF10,000 per month.

[8] If we weight the median monthly income per unit of consumption in the urban areas studied as a function of the number of inhabitants, it drops to €1,697.

Figure 11: Distribution of Uber users by household income in Switzerland

	Nbr	% cit.	IC
Less than 900	13	2%	1% < f < 3%
From 901 to 1,500	11	2%	1% < f < 3%
From 1,501 to 2,000	9	2%	0.9% < f < 2%
From 2,001 to 3,000	9	2%	0.9% < f < 2%
From 3,001 to 4,000	23	4%	3% < f < 5%
From 4,001 to 5,000	33	6%	5% < f < 7%
From 5,001 to 6,000	48	9%	7% < f < 10%
From 6,001 to 7,000	40	7%	6% < f < 9%
From 7,001 to 8,000	31	6%	4% < f < 7%
From 8,001 to 9,000	33	6%	5% < f < 7%
From 9,001 to 10,001	41	7%	6% < f < 9%
From 10,001 to 11,000	40	7%	6% < f < 9%
From 11,001 to 12,000	18	3%	2% < f < 4%
12,001 or more	203	37%	34% < f < 40%
Total	**552**	**100%**	



Source: 6t-bureau de recherche, 2015, sub-sample of 552 respondents in Switzerland having already used Uber and having agreed to declare their income.

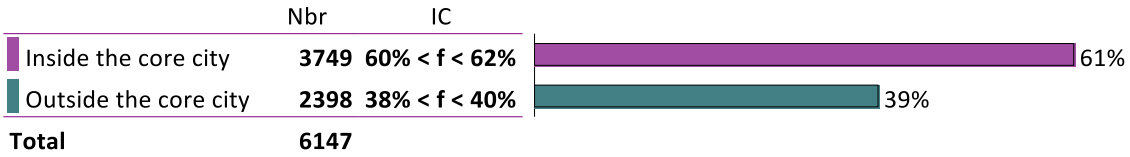
According to the OFS (Swiss Bureau of Statistics), in 2013 the average shopping basket cost CHF183 in Switzerland compared with €113 in France[9], i.e. a difference of 61%. Given that the difference in the standard of living between France and Switzerland has not changed drastically since 2013, this is not enough to explain the gap in the income between French and Swiss users, insofar as the median income of the Swiss is at least three times higher than that of the French. **Swiss users therefore seem more affluent than French users. They are also less likely to be students.**

4 Uber users out of 10 do not live in the center of their urban area

Among the users who reside in one of the urban areas studied where Uber is present, the majority live in the core city of their urban area (61%), but a non-negligible proportion live outside the core city (39%).

[9] http://www.bfs.admin.ch/bfs/portal/fr/index/themen/05/07/blank/key/02.html (consulted 23/06/2015).

Figure 12: Place of residence of Uber users within their urban area



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

Characteristics of users by type of service used

This section aims to determine if users have different profiles depending on whether they use licensed transportation services, peer-to-peer transportation services or both.

Remember that the services offered by the Uber application vary from one urban area of the study to another. The costs are also different. The table below summarizes the different services.

Figure 13: Types of service offered by the Uber application by urban area

Urban area	Services	Driver	Base price	Rate / min	Rate / km	Minimum amount	Cancellation fees
Paris	*uberPOP*	*peer-to-peer*	*€1*	*€0.15*	*€0.95*	*€4*	*€4*
	uberX	licensed	€2	€0.25	€1.4	€8	€8
	BERLINE	licensed	€5	€0.5	€1.55	€15	€10
	VAN	licensed	€5	€0.4	€1.55	€12	€10
Lyon	*uberPOP*	*peer-to-peer*	*€1*	*€0.15*	*€0.95*	*€4*	*€4*
	uberBlack	licensed	€4	€0.45	€1.73	€10	€10
Lille	*uberPOP*	*peer-to-peer*	*€1*	*€0.15*	*€0.95*	*€4*	*€4*
	uberX	licensed	€2	€0.25	€1.4	€6	€6
Bordeaux	*uberPOP*	*peer-to-peer*	*€1*	*€0.15*	*€1*	*€4*	*€4*
Toulouse	*uberPOP*	*peer-to-peer*	*€1*	*€0.15*	*€1*	*€4*	*€4*
Nice	*uberPOP*	*peer-to-peer*	*€1*	*€0.15*	*€1*	*€4*	*€4*
	BERLINE	licensed	€10	€0.3	€1.7	€15	€15
	VAN	licensed	€10	€0.3	€1.7	€15	€15
Geneva	uberX	licensed	CHF 4	CHF 0.4	CHF 2.2	CHF 8	CHF 8

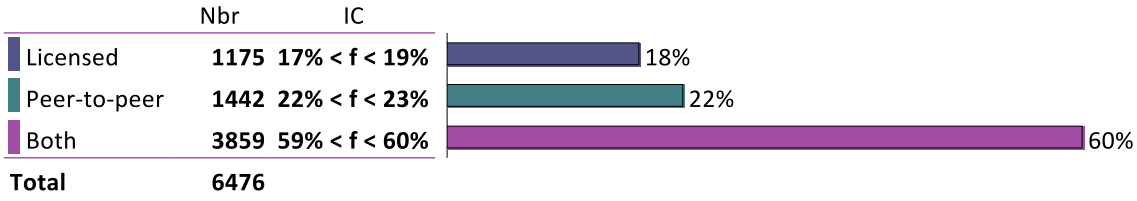
	UuberBlack	licensed	CHF 8	CHF 0.6	CHF 3.6	CHF 15	CHF 10
Lausanne	*uberPOP*	*peer-to-peer*	*CHF 3*	*CHF 0.3*	*CHF 1.35*	*CHF 6*	*CHF 6*

Source: compilation of Uber data by 6t-bureau de recherche (25 June 2015) [10]

Users who mainly use both services

Among the users of private hire services, over half have already used both types of service (60%). Only 18% have used licensed transportation services only and 22% peer-to-peer transportation services only.

Figure 14: Distribution of Uber users by type of service used



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

As indicated in the introduction, the sample is composed of respondents having already used the services offered by Uber. Among the users who only use licensed drivers, 15% have also used Chauffeur Privé and 9% have used LeCab. Allocab and Snapcar are less used (3% and 1% of all users, respectively).

In contrast, the users who have only used peer-to-peer transportation services have rarely used services other than Uber: only 2% have already used Djump, 0.8% Heetch, and 1% a service other than those proposed in the survey.

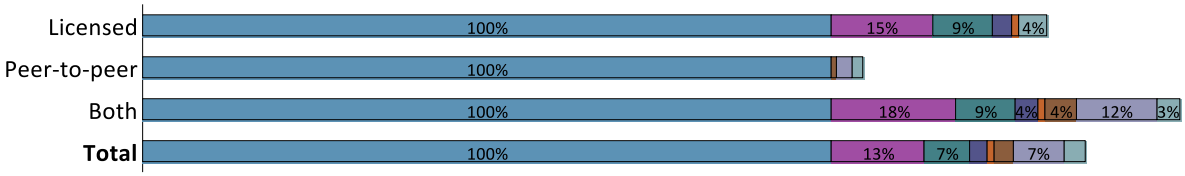
Users who have used both types of service have a greater tendency to use other services than Uber: In particular, 18% of them have already used Chauffeur Privé and 12% have already used Heetch.

[10] Note: the uberPOP service was suspended on 3 July 2015. The suspension took place after the survey and therefore does not affect the results.

Figure 15: Use of competing services by type of Uber service used

	Uber	Chauffeur Privé	LeCab	AlloCab	SnapCar	Djump	Heetch	Other
Licensed	100%	15%	9%	3%	1%	0%	0%	4%
Peer-to-peer	100%	0%	0%	0%	0%	0.8%	2%	1%
Both	100%	18%	9%	4%	1%	4%	12%	3%
Total	**100%**	**13%**	**7%**	**3%**	**0.8%**	**3%**	**7%**	**3%**

p = **0.00** ; Khi2 = **703.72** ; dof = **14** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

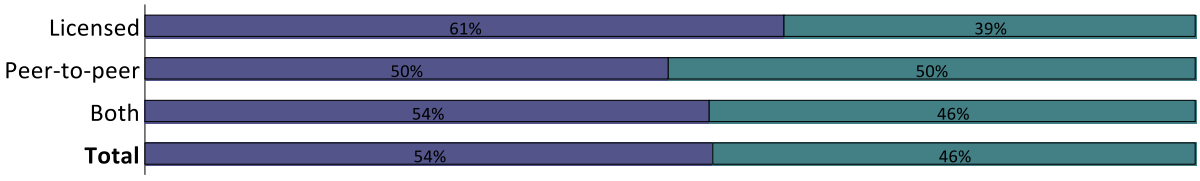
Users of licensed transportation services are different from other users

The proportion of women is higher[11] among the users of peer-to-peer transportation services than among the users of licensed transportation services (50% compared with 39%). We note an overrepresentation of men among the users of licensed transportation services.

Figure 16: Distribution by sex of Uber users by type of service used

	A man	A woman	**Total**
Licensed	716	459	**1175**
Peer-to-peer	720	722	**1442**
Both	**2076**	**1783**	**3859**
Total	**3512**	**2964**	**6476**

p = **<0.01** ; Khi2 = **32.32** ; dof = **2** (**VS**)



[11] This overrepresentation of women among the users of peer-to-peer driver services is explained by the fact that women are more likely to be young (40 % of the women are under 25 years old in the sample compared with 28 % of men) or students (32 % compared with 20 % of men), and therefore to have lower incomes (18 % of them belong to households with income below €900 net per month compared with 9 % of men). They thus correspond more to the profile of the user of peer-to-peer driver services: young, students and low-income earners.

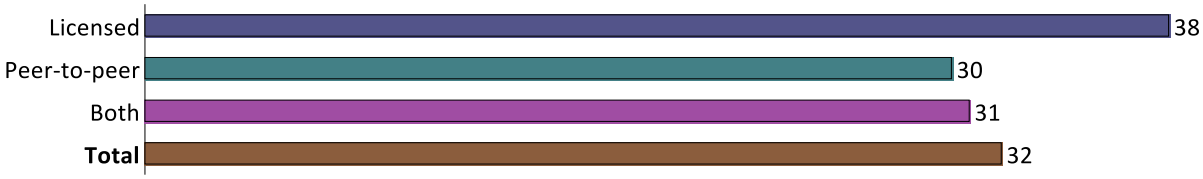
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

The users of peer-to-peer transportation services are significantly younger than the users of licensed transportation services. The average age of the first group is 30, compared with 38 for the latter group. Users who use both types of service, with an average age of 31, are closer to those who only use peer-to-peer transportation services.

Figure 17: Distribution by age of Uber users by type of service used

	Your age:		
	Mean	Std deviation	Median
Licensed	38	14	35
Peer-to-peer	30	12	26
Both	31	11	27
Total	**32**	**12**	**28**

p = **<1%** ; F = **204** (**VS**)



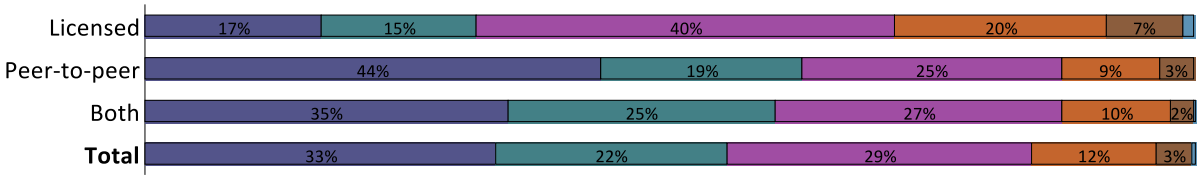
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

44% of the users of peer-to-peer transportation services and 35% of the users of both types of service are under 25, compared with 17% of the users of licensed transportation services. Users over 30 years old are overrepresented among the users of licensed transportation services.

Figure 18: Distribution by age of Uber users by service used

	Less than 25	From 25 to 29	From 30 to 44	From 45 to 59	From 60 to 74	75 and more	**Total**
Licensed	199	173	468	236	86	13	**1175**
Peer-to-peer	628	276	355	135	**46**	**2**	**1442**
Both	1340	978	1054	399	83	5	**3859**
Total	**2167**	**1427**	**1877**	**770**	**215**	**20**	**6476**

p = **0.00** ; Khi2 = **439.70** ; dof = **10** (**VS**)



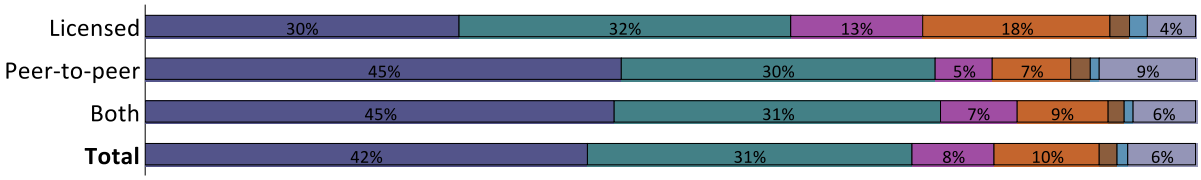
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Consistent with their age, the users of peer-to-peer transportation services have a greater tendency to live alone than the users of licensed transportation services (45% compared with 30%). Conversely, the users of licensed transportation services include a higher proportion of people living as a couple with a child (13% compared with 5%) or several children. The household composition of the users who use both types of service is similar to that of the households of users who only use peer-to-peer transportation services.

Figure 19: Distribution by family structure of Uber users by type of service used

	Alone	As a couple without children	As a couple with one child	As a couple with several children	Alone with a child	Alone with several children	Other	Total
Licensed	352	372	147	210	21	21	52	1175
Peer-to-peer	654	433	78	108	27	11	131	1442
Both	1725	1201	281	331	59	38	224	3859
Total	**2731**	**2006**	**506**	**649**	**107**	**70**	**407**	**6476**

p = **0.00** ; Khi2 = **220.15** ; dof = **12** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

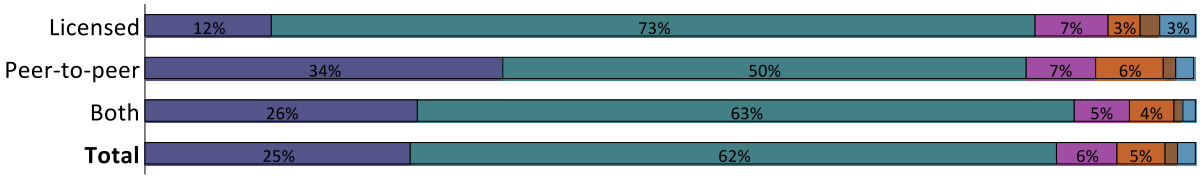
As suggested by the age of the respondents, **users of licensed transportation services include a larger proportion of full-time employed persons (73% compared with 62% of the total sample), while users of peer-to-peer transportation services include a higher proportion of students (34% compared with 25% of the total sample).**

This can be explained by the fact that peer-to-peer transportation services are less expensive (see Figure 11) and are thus more likely to attract young people and students.

Figure 20: Distribution by activity of Uber users by type of service used

	In training (student)	Active full time (+ 32hr/week)	Active part-time (up to 32hr/week)	Looking for employment	Homemaker	Retired	Total
Licensed	143	854	81	36	22	39	1175
Peer-to-peer	493	718	96	92	17	26	1442
Both	1003	2413	202	168	30	43	3859
Total	**1639**	**3985**	**379**	**296**	**69**	**108**	**6476**

p = **0.00** ; Khi2 = **242.11** ; dof = **10** (**VS**)



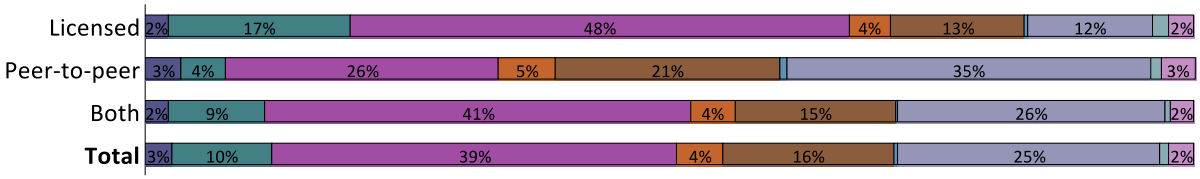
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Consistent with the results presented above, managers and liberal professions are more strongly represented among the users of licensed transportation services (48% compared with 26% of the users of peer-to-peer transportation services), as are company managers (17% compared with 4%).

Figure 21: Distribution by social-professional category of Uber users by type of service used

	Craftsman, shopkeeper	Company manager	Manager, higher intellectual profession	Middle-level profession	Employee	Worker	Student	Retired	No professional activity	Total
Licensed	26	204	559	46	150	3	140	18	29	1175
Peer-to-peer	50	62	374	78	309	10	500	14	45	1442
Both	91	353	1566	159	594	6	985	19	86	3859
Total	**167**	**619**	**2499**	**283**	**1053**	**19**	**1625**	**51**	**160**	**6476**

p = **0.00** ; Khi2 = **411.68** ; dof = **16** (**VS**)



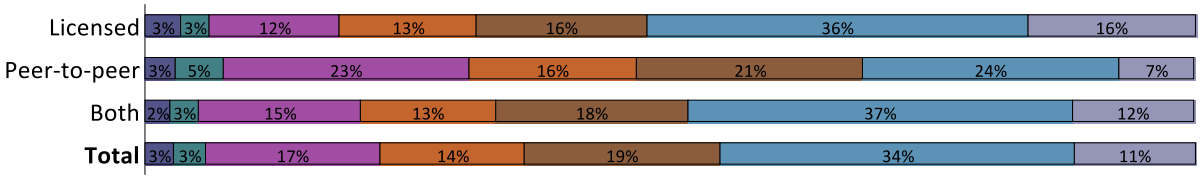
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Users of peer-to-peer transportation services tend to have lower levels of education than those of licensed transportation services (24% and 36%, respectively, are holders of a 5-year degree; 23% and 12% are holders of a high school diploma). This is explained in part because they are students and therefore have not completed their studies. Although they resemble the users of peer-to-peer transportation services by the composition of their household, users who use both types of service are closer to the users of licensed transportation services by their high level of education. Users who make use of both types of service are therefore persons who often live alone and have a high level of education.

Figure 22: Distribution by level of education of Uber users by service used

	No diploma	BEP/CAP (vocational training certificate) or equivalent	Baccal auréat (high school diploma) or equivalent	2 years of university (technical degree, etc.)	3 years of university (B.A., etc.)	5 years of university (M.A., etc.)	More than 5 years of university (speci alised M.A., PhD)	**Total**
Licensed	**40**	**32**	**146**	**153**	**191**	**427**	**186**	**1175**
Peer-to-peer	**43**	**65**	**338**	**230**	**310**	**351**	**105**	**1442**
Both	**93**	**107**	**592**	**503**	**703**	**1410**	**451**	**3859**
Total	**176**	**204**	**1076**	**886**	**1204**	**2188**	**742**	**6476**

p = **0.00** ; Khi2 = **179.21** ; dof = **12** (**VS**)



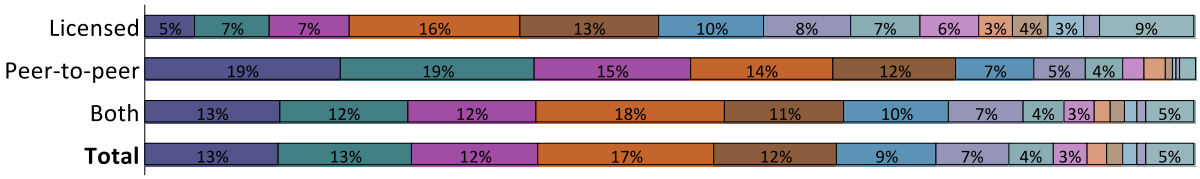
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Among the users who reside in France and who agreed to indicate the net monthly income of their household, there is a large income gap between those who use licensed transportation services and those who use peer-to-peer transportation services. Thirty-eight percent of the users of peer-to-peer transportation services declare an income of less than 1,500 euros per month, compared with only 12% of the users of licensed transportation services. Conversely, 9% of the users of licensed transportation services declare an income of over €12,500, compared with only 1% of the users of peer-to-peer transportation services. These differences can be explained by the differences in rates between the two types of service: due to their lower rates, peer-to-peer transportation services are more likely to satisfy populations with lower levels of income.

Figure 23: Distribution by income of Uber users by type of service used

	Licensed		Peer-to-peer		Both		**Total**	
	N	% cit.	N	% cit.	N	% cit.	N	% cit.
Less than 900	33	5%	165	19%	363	13%	561	13%
From 901 to 1,500	49	7%	164	19%	339	12%	552	13%
From 1,501 to 2,000	51	7%	131	15%	342	12%	524	12%
From 2,001 to 3,000	112	16%	120	14%	504	18%	736	17%
From 3,001 to 4,000	89	13%	103	12%	317	11%	509	12%
From 4,001 to 5,000	69	10%	66	7%	278	10%	413	9%
From 5,001 to 6,000	56	8%	44	5%	199	7%	299	7%
From 6,001 to 7,000	45	7%	31	4%	110	4%	186	4%
From 7,001 to 8,000	39	6%	19	2%	83	3%	141	3%
From 8,001 to 9,000	21	3%	17	2%	42	1%	80	2%
From 9,001 to 10,001	24	4%	6	0.7%	35	1%	65	1%
From 10,001 to 11,000	23	3%	3	0.3%	34	1%	60	1%
From 11,001 to 12,000	10	1%	3	0.3%	24	0.9%	37	0.8%
12,001 or more	62	9%	13	1%	131	5%	206	5%
Total	**683**	**100%**	**885**	**100%**	**2801**	**100%**	**4369**	

p = **0.00** ; Khi2 = **275.82** ; dof = **26** (**VS**)



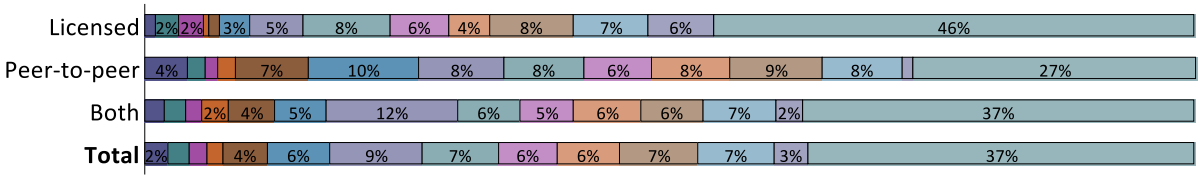
Source: 6t-bureau de recherche, 2015, sub-sample of 4,369 respondents in France having already used Uber and having agreed to declare their income.

We observe a similar trend for the users who reside in Switzerland and who accepted to declare the net monthly income of their households: 46% of the users of licensed transportation services indicate an income over CHF12,000 per month, compared with 27% of the users of peer-to-peer transportation services.

Figure 24: Distribution by income of Uber users in Switzerland by type of service used

	Licensed		Peer-to-peer		Both		**Total**	
	N	% cit.	N	% cit.	N	% cit.	N	% cit.
Less than 900	**2**	**1%**	**7**	**4%**	**4**	**2%**	**13**	**2%**
From 901 to 1,500	**4**	**2%**	**3**	**2%**	**4**	**2%**	**11**	**2%**
From 1,501 to 2,000	**4**	**2%**	**2**	**1%**	**3**	**1%**	**9**	**2%**
From 2,001 to 3,000	**1**	**0.6%**	**3**	**2%**	**5**	**2%**	**9**	**2%**
From 3,001 to 4,000	**2**	**1%**	**12**	**7%**	**9**	**4%**	**23**	**4%**
From 4,001 to 5,000	**5**	**3%**	**18**	**10%**	**10**	**5%**	**33**	**6%**
From 5,001 to 6,000	**9**	**5%**	**14**	**8%**	**25**	**12%**	**48**	**9%**
From 6,001 to 7,000	**15**	**8%**	**13**	**8%**	**12**	**6%**	**40**	**7%**
From 7,001 to 8,000	**10**	**6%**	**11**	**6%**	**10**	**5%**	**31**	**6%**
From 8,001 to 9,000	**7**	**4%**	**13**	**8%**	**13**	**6%**	**33**	**6%**
From 9,001 to 10,001	**14**	**8%**	**15**	**9%**	**12**	**6%**	**41**	**7%**
From 10,001 to 11,000	**13**	**7%**	**13**	**8%**	**14**	**7%**	**40**	**7%**
From 11,001 to 12,000	**11**	**6%**	**2**	**1%**	**5**	**2%**	**18**	**3%**
12,001 or more	**82**	**46%**	**46**	**27%**	**75**	**37%**	**203**	**37%**
Total	**179**	**100%**	**172**	**100%**	**201**	**100%**	**552**	

p = **0.004** ; Khi2 = **49.10** ; dof = **26** (**VS**)



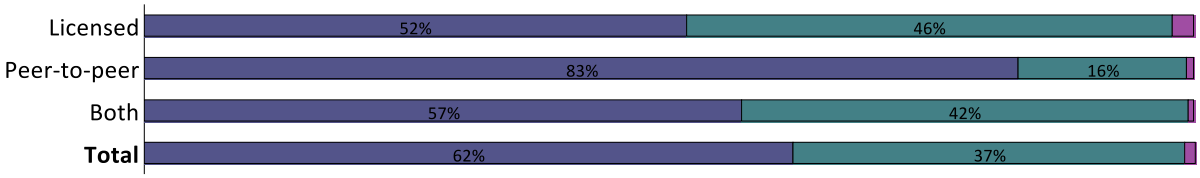
Source: 6t-bureau de recherche, 2015, sub-sample of 552 respondents in Switzerland having already used Uber and having agreed to declare their income.

The users of peer-to-peer transportation services are overrepresented among those who use these services only for private use. The users of licensed transportation services are more likely to use these services for both private and professional use (46% compared with 37% of the total sample). These users, who are typically older with higher incomes, are more likely to be concerned by the quality of service provided by licensed transportation services.

Figure 25 Distribution by type of use (private/professional) of Uber users by service used

	Privately	Privately and professionally	Only professionally	Total
Licensed	608	543	24	1175
Peer-to-peer	1200	231	11	1442
Both	2198	1639	22	3859
Total	**4006**	**2413**	**57**	**6476**

p = **0.00** ; Khi2 = **391.25** ; dof = **4** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Differences in the urban areas reflect the types of services available

The intersection of the services used with the urban area of residence reveals very significant differences, which are certainly partially due to the difference between the services available from one urban area to another. However, it must be kept in mind that users may also use Uber services in cities other than that of their residence.

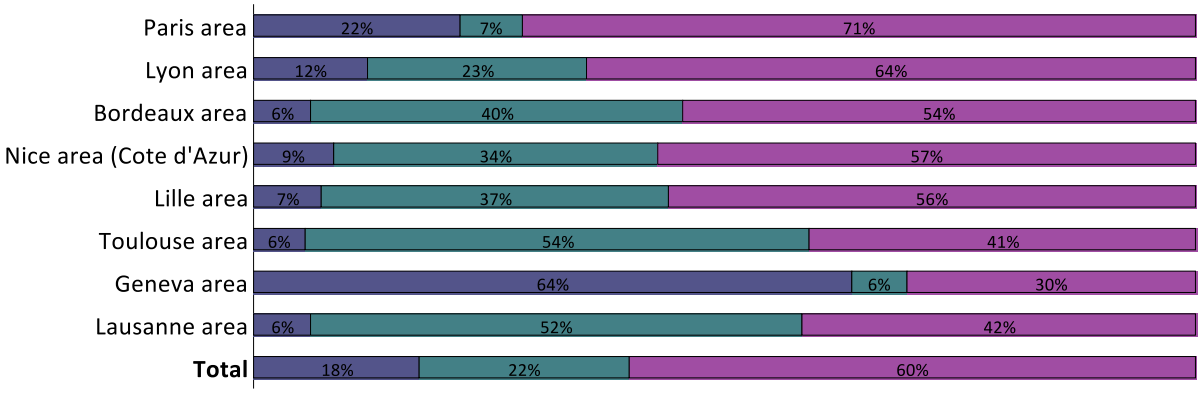
In the Paris area, over two thirds of the users use both types of service (71%), with similar results in the Lyon area (64%). In other French cities, the proportion of users who use only peer-to-peer transportation services varies between 34% and 54%, compared with 23% in the Lyon area and 7% in the Paris area.

uberPOP is the only Uber option available in Toulouse and Bordeaux, but this is not the case for Lille, where uberX is also available, nor for the Côte d'Azur, where BERLINE and VAN are also available. Yet, in these last two urban areas, the proportion of users who use only peer-to-peer transportation services remains high (34% and 37% respectively). In the Geneva urban area, where only the uberX and uberBLACK options are available, the proportion of users who use only licensed driver solutions is particularly high (64%). In contrast, in the Lausanne area, where uberPOP is the only option available, the proportion of users of peer-to-peer transportation services is high (52%).

Figure 26: Distribution by urban area of residence of Uber users by service used

	Licensed	Peer-to-peer	Both	Total
Paris area	603	182	1953	2738
Lyon area	78	150	414	642
Bordeaux area	27	175	241	443
Nice area (Cote d'Azur)	41	163	271	475
Lille area	42	211	320	573
Toulouse area	28	273	208	509
Geneva area	242	23	116	381
Lausanne area	24	201	161	386
Total	**1085**	**1378**	**3684**	**6147**

p = **0.00** ; Khi2 = **1692.56** ; dof = **14** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

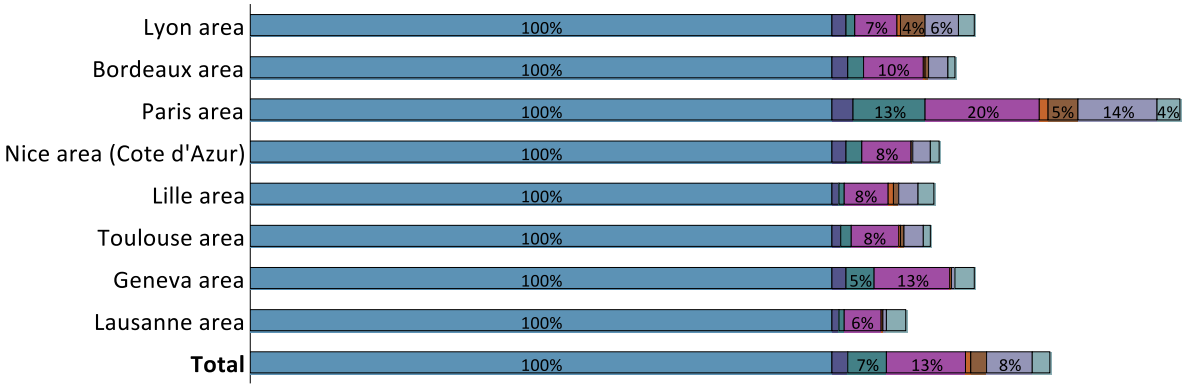
Users residing in the Paris area are those who are most likely to use several different services: thus, 20% of them have already used Chauffeur Privé, 14% have already used Heetch and 13% have already used LeCab[12]. This is explained by a much more abundant offer of private hire services in the French capital than in the other cities studied.

[12] AlloCab is present in the six French urban areas studied; Heetch is present in Paris and Lyon; LeCab, Chauffeur Privé, SnapCar and Djumb are only available in Paris.

Figure 27: Distribution by urban area of residence of Uber users by competitors' services used

	Uber	AlloCab	LeCab	Chauffeur Privé	SnapCar	Djump	Heetch	Other
Lyon area	100%	2%	2%	7%	0.6%	4%	6%	2%
Bordeaux area	100%	3%	3%	10%	0.5%	0.5%	3%	1%
Paris area	100%	3%	13%	20%	1%	5%	14%	4%
Nice area (Cote d'Azur)	100%	2%	3%	8%	0%	0.4%	3%	1%
Lille area	100%	1%	0.9%	8%	0.7%	0.9%	3%	3%
Toulouse area	100%	1%	2%	8%	0.2%	0.6%	3%	1%
Geneva area	100%	2%	5%	13%	0.3%	0%	0.5%	3%
Lausanne area	100%	1%	0.8%	6%	0.5%	0%	0.5%	3%
Total	**100%**	**3%**	**7%**	**13%**	**0.8%**	**3%**	**8%**	**3%**

p = **<0.01** ; Khi2 = **623.06** ; dof = **49** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

Characteristics of users according to the urban area of residence

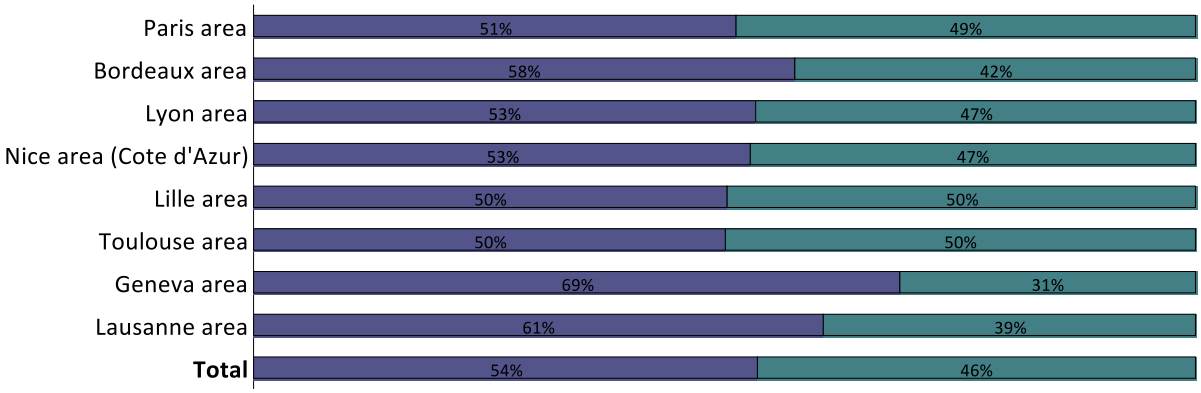
This section aims to determine the extent to which the profile of Uber users varies according to the urban area where they reside, regardless of the type of service available.

As regards the distribution of users by sex, there is a significant difference between France and Switzerland. In the Geneva and Lausanne areas, men are significantly overrepresented in relation to the rest of the sample (69% and 61%, respectively, compared with 54% in the total sample). In the French urban areas, men are overrepresented compared with the entire population of urban areas but this is less pronounced than in Switzerland, with the exception of Bordeaux where there are 58% of men, but the gap found between this urban area and the rest of the sample is not very significant. In the urban areas of Paris, Lyon, Lille, Nice and Toulouse, the proportion of men represents 48% of the population. Among the respondents, they represent 51 to 53%, respectively, which corresponds to values that are 2 percentage points higher on average.

Figure 28: Distribution by sex of Uber users by urban area of residence

	A man	A woman	Total
Paris area	1406	1332	2738
Bordeaux area	255	188	443
Lyon area	343	299	642
Nice area (Cote d'Azur)	251	224	475
Lille area	289	284	573
Toulouse area	255	254	509
Geneva area	262	119	381
Lausanne area	234	152	386
Total	**3295**	**2852**	**6147**

p = **<0.01** ; Khi2 = **56.19** ; dof = **7** (**VS**)



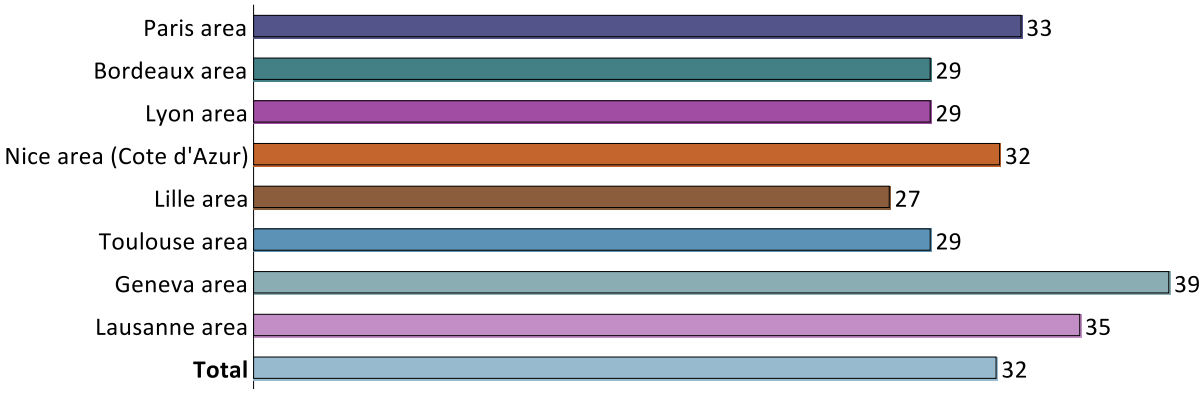
Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

On average, users are slightly older in the Paris area and the Côte d'Azur (33 and 32 years old, respectively) than in the other French cities, where the average age of users varies between 27 and 29 years old. The Geneva and Lausanne urban areas distinguish themselves by higher average ages (39 and 35 years old, respectively).

Figure 29: Distribution by age of Uber users by urban area of residence

	Your age:		
	Mean	Std deviation	Median
Paris area	33	12	29
Bordeaux area	29	11	25
Lyon area	29	10	25
Nice area (Cote d'Azur)	32	13	27
Lille area	27	9	24
Toulouse area	29	11	25
Geneva area	39	12	37
Lausanne area	35	12	33
Total	**32**	**12**	**28**

p = **<1%** ; F = **58** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

Distribution by age reveals a high proportion of users under 30 in all the French urban areas studied, and more particularly in Lille (72% compared with 24% of 15-29 year olds in the whole population), **Toulouse** (69% compared with 27%), **Bordeaux** (68% compared with 24%) **and Lyon** (68% compared with 24%). **This is linked to the type of service available in the urban areas**, in particular of peer-to-peer transportation services which, as we have just seen, are used by a majority of students or young, professionally employed people.

In the Paris and Nice areas, we note an overrepresentation of 30 to 44-year-olds (32% and 27%, respectively, compared with 23% and 19% for the entire population), whereas in the other urban areas the proportion of 30 to 44-year-olds is similar among the respondents and among all residents. The over 45s are underrepresented in all French urban areas.

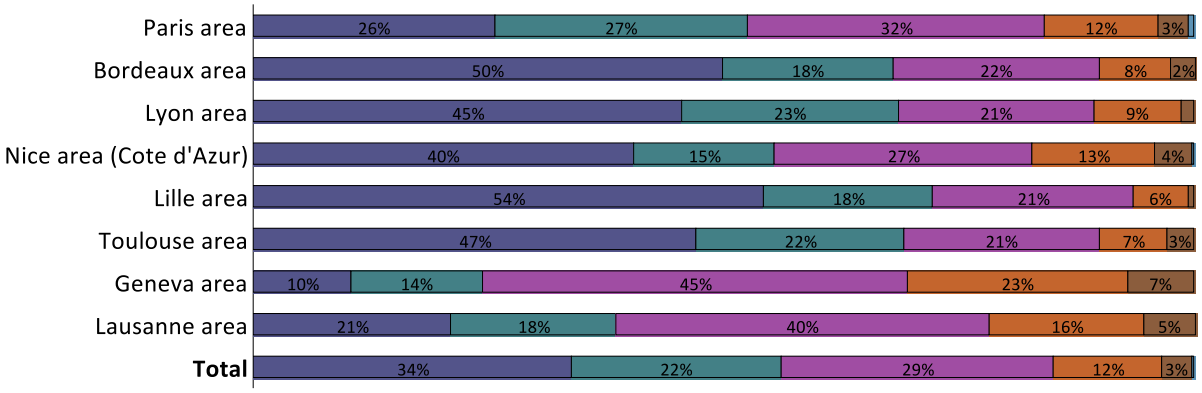
In the Geneva and Lausanne urban areas, the 30-44 year old age group is the most highly represented (45% and 40%). In the canton of Geneva, this age group represents only 23%, which is considerably lower than the figure observed among the respondents. In the city of Lausanne, they account for only 26% of the residents. The 45-59 year old group is also overrepresented among the Swiss respondents compared with the rest of the sample (23% and 16% in the

Geneva and Lausanne areas, compared with 12% in the total sample).

Figure 30: Distribution by age group of Uber users by urban area of residence

	Less than 25	From 25 to 29	From 30 to 44	From 45 to 59	From 60 to 74	75 and more	Total
Paris area	705	732	866	331	88	16	2738
Bordeaux area	221	80	97	34	11	0	443
Lyon area	292	148	134	59	8	1	642
Nice area (Cote d'Azur)	192	71	130	62	19	1	475
Lille area	311	102	123	33	4	0	573
Toulouse area	240	112	106	36	15	0	509
Geneva area	40	53	172	89	27	0	381
Lausanne area	81	68	153	63	21	0	386
Total	**2082**	**1366**	**1781**	**707**	**193**	**18**	**6147**

p = **<0.01** ; Khi2 = **608.60** ; dof = **35** (**VS**)



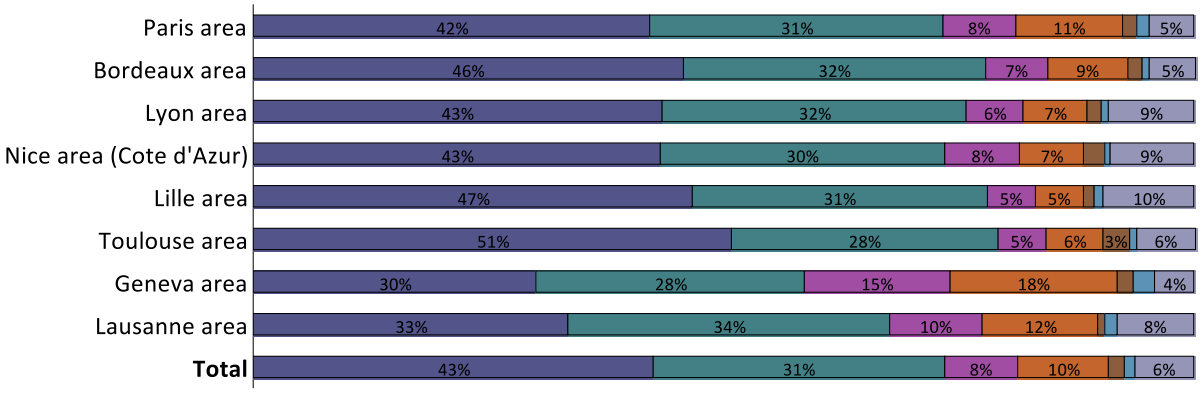
Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

The household composition of users varies relatively little from one French urban area to the other. In each of them, persons living alone and couples without children represent approximately three-quarters of all respondents (between 73 and 79% depending on the urban area). On the national scale in France, these two types of households represent 51% of all households: they are therefore overrepresented in the sample. Symmetrically, couples with children and single-parent families are underrepresented. In the Geneva urban area, couples with one or more children are more represented than in the other urban areas (33% compared with 18% in the total sample).

Figure 31 Distribution by family structure group of Uber users by urban area of residence

	Alone	As a couple without children	As a couple with one child	As a couple with several children	Alone with a child	Alone with several children	Other	Total
Paris area	1155	852	214	307	43	33	134	2738
Bordeaux area	203	142	29	38	6	4	21	443
Lyon area	279	207	39	44	10	4	59	642
Nice area (Cote d'Azur)	206	143	38	32	11	2	43	475
Lille area	268	179	29	29	7	5	56	573
Toulouse area	259	144	26	31	14	4	31	509
Geneva area	115	108	59	68	6	9	16	381
Lausanne area	129	132	38	47	3	5	32	386
Total	**2614**	**1907**	**472**	**596**	**100**	**66**	**392**	**6147**

p = **<0.01** ; Khi2 = **205.57** ; dof = **42** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

Students are strongly represented among the users who reside in French urban areas other than Paris. The proportion of students reaches a peak in Lille (45%), but is also very high in the Bordeaux, Lyon and Toulouse areas (37, 35 and 38%, respectively, compared with 26% in the total sample). On the scale of the overall population aged between 15 and 64 living in these four cities, students account for an average of only 15% of the population, but this is higher than the French average (10% of the French population aged between 15 and 64 are students).

Students are also overrepresented in the Paris area, although to a lesser extent: they represent 18% of the sample while they constitute only 11% of the population aged between 15 and 64 in the Ile-de-France region. The lower proportion of students among the users of private hire services in the Paris urban area in relation to other urban areas can be explained in part by an alternative offer (underground, night buses, Vélib', Autolib', etc.) that is cheap, more abundant and that circulates later in the evening in the capital than in the other urban areas. Students in the Ile-de-France region are less dependent on private hire services, whereas in the other areas

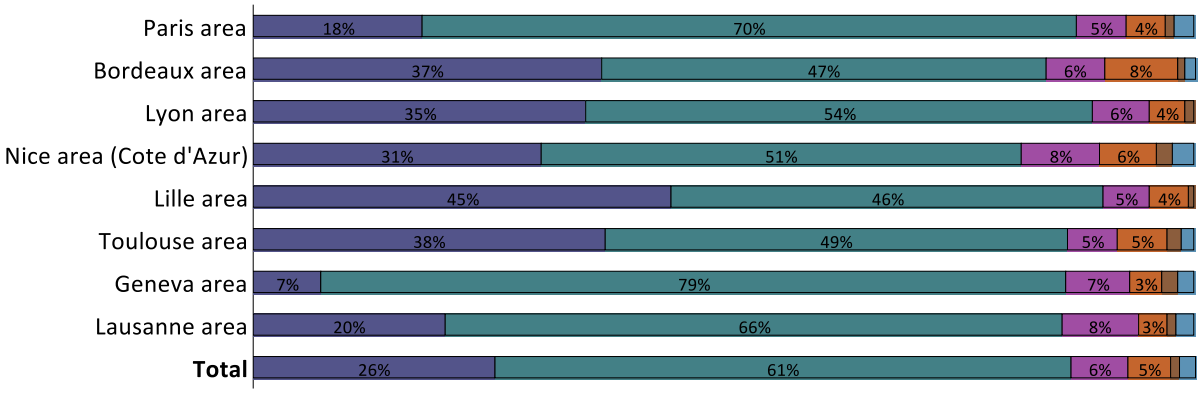
these services are a new and financially accessible alternative which allows them to travel when the public transport network is not available. In addition, private hire services have been present in the capital longer: one can thus assume that a type of "generational feedback" is taking place. Indeed, the first to adopt these services are young people through word-of-mouth. The use progressively spreads to the older generations, with the proportion of students thus becoming smaller over the course of time.

Users residing in the Paris and Geneva urban areas distinguish themselves by the overrepresentation of full-time employed employees compared with the rest of the sample (70 and 66%, respectively, compared with 61% in the total sample).

Figure 32: Distribution by activity of Uber users by urban area of residence

	In training (student)	Active full time (+ 32hr/week)	Active part-time (up to 32hr/week)	Looking for emplo yment	Homem aker	Retired	**Total**
Paris area	491	1904	144	114	28	57	2738
Bordeaux area	164	209	28	34	3	5	443
Lyon area	227	345	39	24	6	1	642
Nice area (Cote d'Azur)	146	242	39	29	8	11	475
Lille area	255	262	28	24	3	1	573
Toulouse area	191	249	27	27	8	7	509
Geneva area	28	301	26	13	6	7	381
Lausanne area	79	253	31	12	3	8	386
Total	1581	3765	362	277	65	97	6147

p = **<0.01** ; Khi2 = **448.15** ; dof = **35** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

Users residing in the Paris area also stand out by a high proportion of senior management and higher intellectual professions (51% compared with 39% in the total sample and 17% in the total population of the Ile-de-France region). As explained above, students are overrepresented

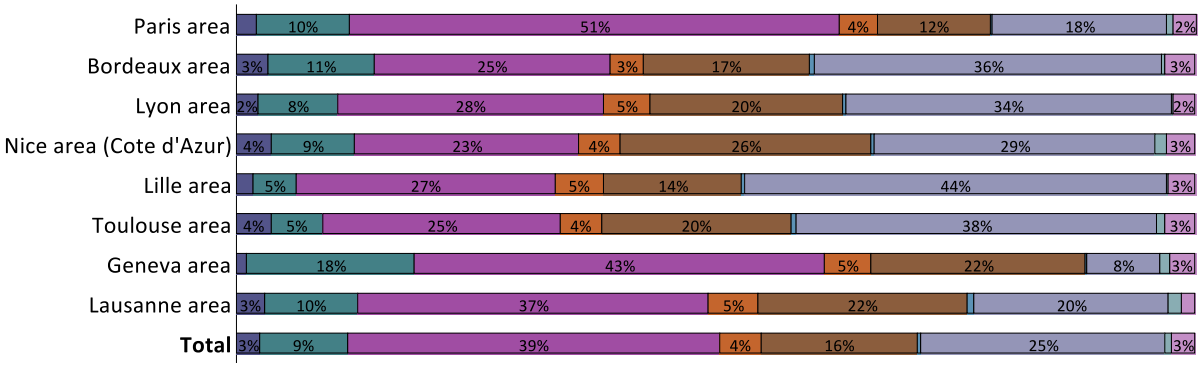
in the other French urban areas, but other groups are also overrepresented: **on the Côte d'Azur, and to a lesser extent within the Lyon and Toulouse areas, we observe an overrepresentation of employees** (26, 20 and 20%, respectively, compared with 18, 16 and 15.5% for the entire population aged between 16 and 64 of these urban areas and 16% in the total sample).

The Geneva area, where students are underrepresented (8% compared with 25% in the total sample), **is the only area of the study where company managers are overrepresented** (18% compared with 9% of the total sample). **We also observe an overrepresentation of employees** (22% compared with 16% of the total sample), as well as a slight overrepresentation of management and higher intellectual professions (43% compared with 39% of the total sample). **In the Lausanne area, students are also underrepresented** (20%) **and employees are overrepresented** (22%).

Figure 33: Distribution by socio-professional category of Uber users by urban area of residence

	Craftsman, shopkeeper	Company manager	Manager, higher intellectual profession	Middle-level profession	Employee	Worker	Student	Retired	No professional activity	Total
Paris area	61	262	1398	109	325	3	495	22	63	2738
Bordeaux area	15	49	109	15	77	2	160	2	14	443
Lyon area	15	53	178	31	129	2	218	1	15	642
Nice area (Cote d'Azur)	18	41	111	20	124	2	139	6	14	475
Lille area	10	26	155	29	82	2	252	1	16	573
Toulouse area	19	27	126	22	101	2	191	5	16	509
Geneva area	4	67	163	18	85	1	29	4	10	381
Lausanne area	12	37	141	20	84	3	78	5	6	386
Total	154	562	2381	264	1007	17	1562	46	154	6147

p = **<0.01** ; Khi2 = **665.68** ; dof = **56** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

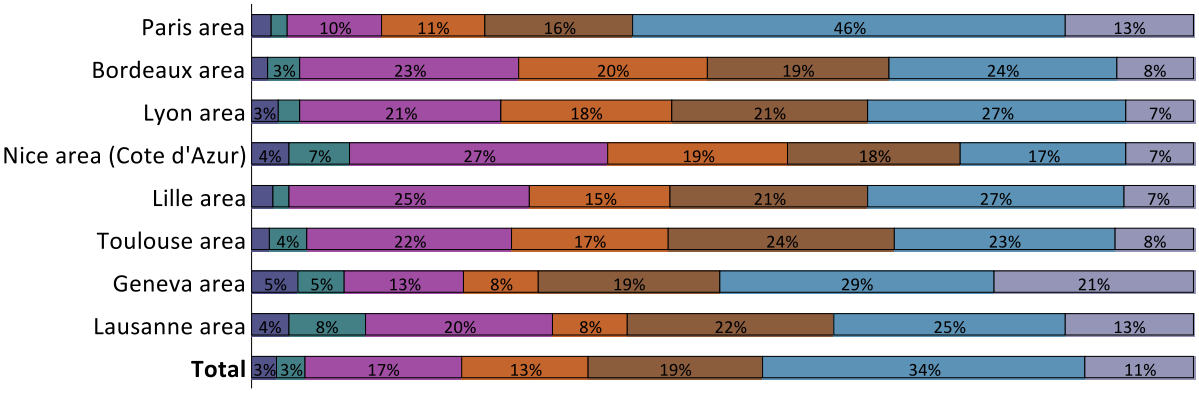
The Paris and Geneva urban areas represent particularly high proportions of highly educated

users (5-year university degrees or higher): 59% in Paris and 50% in Geneva. **In French urban areas outside of Paris, users with high school diplomas are overrepresented** (from 21% in the Lyon area to 27% on the Cote d'Azur, compared with 17% in the total sample), as are, to a lesser extent, users with 2-year degrees. In addition, certain urban areas present specific particularities: persons with 3-year degrees are overrepresented in the Toulouse area (24% compared with 19% in the total sample); persons with no degrees and/or holders of vocational certificates are overrepresented in the Nice, Geneva and Lausanne areas.

Figure 34: Distribution by educational level of Uber users by urban area of residence

	No diploma	BEP/CAP (vocational training certificate) or equivalent	Baccalauréat (high school diploma) or equivalent	2 years of university (technical degree, etc.)	3 years of university (B.A., etc.)	5 years of university (M.A., etc.)	More than 5 years of university (specialised M.A., PhD)	Total
Paris area	62	45	273	300	432	1258	368	2738
Bordeaux area	8	15	103	89	85	107	36	443
Lyon area	19	14	137	117	134	176	45	642
Nice area (Cote d'Azur)	19	31	130	91	87	83	34	475
Lille area	13	10	146	86	120	156	42	573
Toulouse area	10	20	111	85	122	119	42	509
Geneva area	19	19	48	30	74	111	80	381
Lausanne area	16	31	77	30	85	95	52	386
Total	**166**	**185**	**1025**	**828**	**1139**	**2105**	**699**	**6147**

p = **<0.01** ; Khi2 = **650.92** ; dof = **42** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

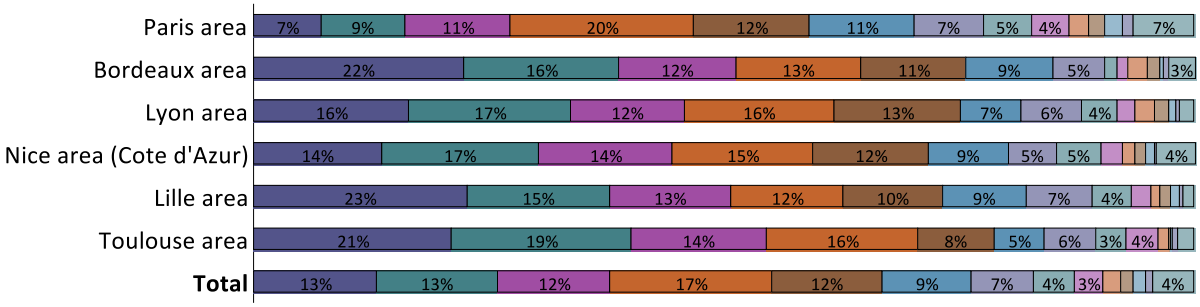
Among users who reside in the Paris area and who accepted to declare the net monthly income of their household, we observe an underrepresentation of lower income groups (up to €2000) and an overrepresentation of mid- and higher-income groups (7% of users declare incomes over

€12,000 compared with 4% for all users residing in France having agreed to declare their income). Among the users who reside in French urban areas other than Paris, we observe an overrepresentation of incomes below €1,500 (from 31% on the Côte d'Azur to 40% in the Toulouse area, compared with 16% in the Paris area). This income gap can be explained in part by the profiles of users as a function the city: users residing in urban areas other than Paris include more students or professionally active young people with modest income. **Thus, it seems that the type of service available influences the profile of users more than the area of residence.** This income gap may also be explained by a public transport offer that is particularly efficient in the Paris area, limiting the use of these services by the lower-income populations residing in the Ile-de-France region.

Figure 35: Distribution by income of Uber users by urban area of residence in France

	Paris area	Bordeaux area	Lyon area	Nice area (Cote d'Azur)	Lille area	Toulouse area	**Total**
Less than 900	7%	22%	16%	14%	23%	21%	13%
From 901 to 1,500	9%	16%	17%	17%	15%	19%	13%
From 1,501 to 2,000	11%	12%	12%	14%	13%	14%	12%
From 2,001 to 3,000	20%	13%	16%	15%	12%	16%	17%
From 3,001 to 4,000	12%	11%	13%	12%	10%	8%	12%
From 4,001 to 5,000	11%	9%	7%	9%	9%	5%	9%
From 5,001 to 6,000	7%	5%	6%	5%	7%	6%	7%
From 6,001 to 7,000	5%	1%	4%	5%	4%	3%	4%
From 7,001 to 8,000	4%	1%	2%	2%	2%	4%	3%
From 8,001 to 9,000	2%	2%	2%	1%	0.9%	1%	2%
From 9,001 to 10,001	2%	1%	2%	1%	1%	0.3%	1%
From 10,001 to 11,000	2%	0.3%	0.6%	0.9%	0.9%	0.3%	1%
From 11,001 to 12,000	1%	0.6%	0.4%	0.3%	0.5%	0.5%	0.8%
12,001 or more	7%	3%	2%	4%	1%	2%	4%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	

p = **<0.01** ; Khi2 = **347.21** ; dof = **65** (**VS**)



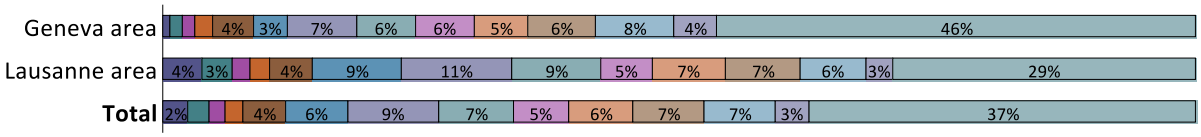
Source: 6t-bureau de recherche, 2015, sub-sample of 4,369 respondents in France having already used Uber in the urban area where they reside and having agreed to declare their income.

Among users residing in Switzerland and who agreed to declare the net monthly income of their household, those who reside in the Geneva area tend to have higher incomes than those who reside in the Lausanne area: 46% of the first group declare an income over CHF 12,000 per month, compared with 29% of the latter group. This is consistent with the profile of users residing in the Geneva area: they are more professionally active, older and have higher professional categories.

Figure 36: Distribution by income of Uber users by urban area of residence in Switzerland

	Geneva area		Lausanne area		**Total**	
	N	% obs.	N	% obs.	N	% obs.
Less than 900	2	**0.8%**	11	**4%**	**13**	**2%**
From 901 to 1,500	**3**	**1%**	**8**	**3%**	**11**	**2%**
From 1,501 to 2,000	**3**	**1%**	**5**	**2%**	**8**	**2%**
From 2,001 to 3,000	**4**	**2%**	**5**	**2%**	**9**	**2%**
From 3,001 to 4,000	**10**	**4%**	**12**	**4%**	**22**	**4%**
From 4,001 to 5,000	8	**3%**	24	**9%**	**32**	**6%**
From 5,001 to 6,000	**17**	**7%**	**30**	**11%**	**47**	**9%**
From 6,001 to 7,000	**14**	**6%**	**24**	**9%**	**38**	**7%**
From 7,001 to 8,000	**14**	**6%**	**14**	**5%**	**28**	**5%**
From 8,001 to 9,000	**13**	**5%**	**20**	**7%**	**33**	**6%**
From 9,001 to 10,001	**16**	**6%**	**20**	**7%**	**36**	**7%**
From 10,001 to 11,000	**19**	**8%**	**18**	**6%**	**37**	**7%**
From 11,001 to 12,000	**10**	**4%**	**7**	**3%**	**17**	**3%**
12,001 or more	115	**46%**	82	**29%**	**197**	**37%**
Total	**248**	**100%**	**280**	**100%**	**528**	

p = **0.005** ; Khi2 = **29.71** ; dof = **13** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 552 respondents in Switzerland having already used Uber in the urban area where they reside and having agreed to declare their income.

The residential location of users varies according to the urban area where they reside. The Cote d'Azur and the Toulouse area distinguish themselves by a high rate of users in the core cities (75% and 78%, respectively, compared with 61% in the total sample), whereas the Lille, Geneva and Lausanne areas have relatively low proportions of users residing in the core cities (50, 51 and 51%, respectively). This can be explained in part by the surface area of the core cities: the territory of Toulouse (118 km^2) is almost three times larger than that of Lille (40 km^2)

In the Paris area, the proportion of Uber users who live outside of Paris (41%) is higher than that

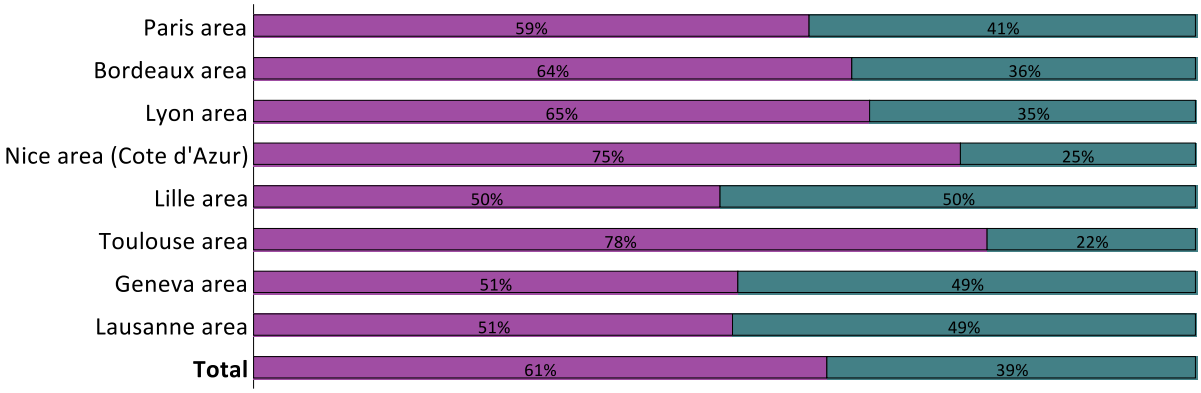
of users of Autolib' and Communauto who live outside of Paris (27% and 12%, respectively).

Figure 37: Place of residence of Uber users by urban area of residence

	Inside the core city	Outside the core city	Total
Paris area	1616	1122	2738
Bordeaux area	282	161	443
Lyon area	420	222	642
Nice area (Cote d'Azur)	357	118	475
Lille area	284	289	573
Toulouse area	397	112	509
Geneva area	196	185	381
Lausanne area	197	189	386
Total	**3749**	**2398**	**6147**

p = **<0.01** ; Khi2 = **175.14** ; dof = **7** (**VS**)

The relation is very significant.
Some modalities have been groupedelements over (under) represented are coloured.



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

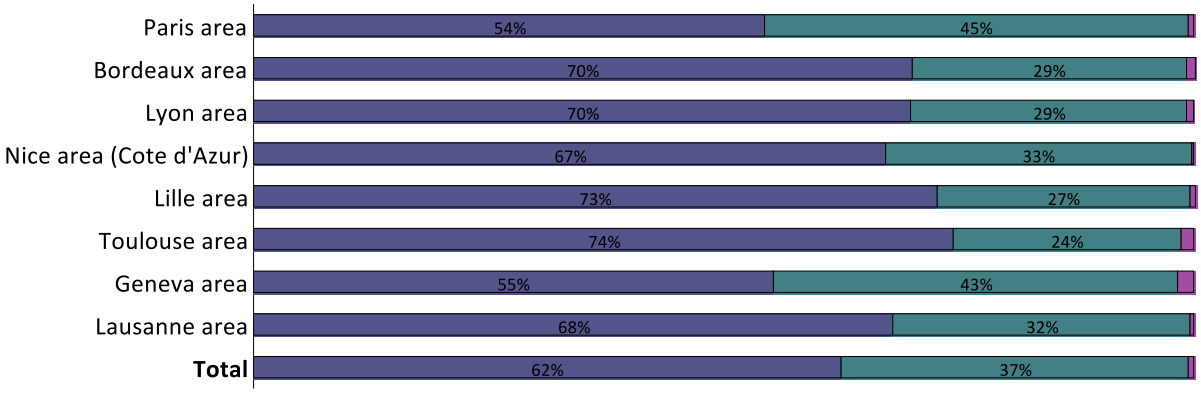
In French urban areas other than Paris, as well as in Lausanne, users of private hire services for private reasons are overrepresented. In the Paris area, as in the Geneva area, almost half (46 and 47%, respectively) use private hire services professionally, often coupled with private use.

Figure 38: Distribution by type of use (private/professional) of Uber users by urban area of residence

	Privately	Privately and professionally	Only professionally	Total
Paris area	1489	1233	16	2738
Bordeaux area	310	129	4	443
Lyon area	449	188	5	642
Nice area (Cote d'Azur)	319	155	1	475
Lille area	416	154	3	573
Toulouse area	379	123	7	509
Geneva area	211	163	7	381
Lausanne area	262	122	2	386
Total	**3835**	**2267**	**45**	**6147**

p = **0.00** ; Khi2 = **192.06** ; dof = **14** (**VS**)

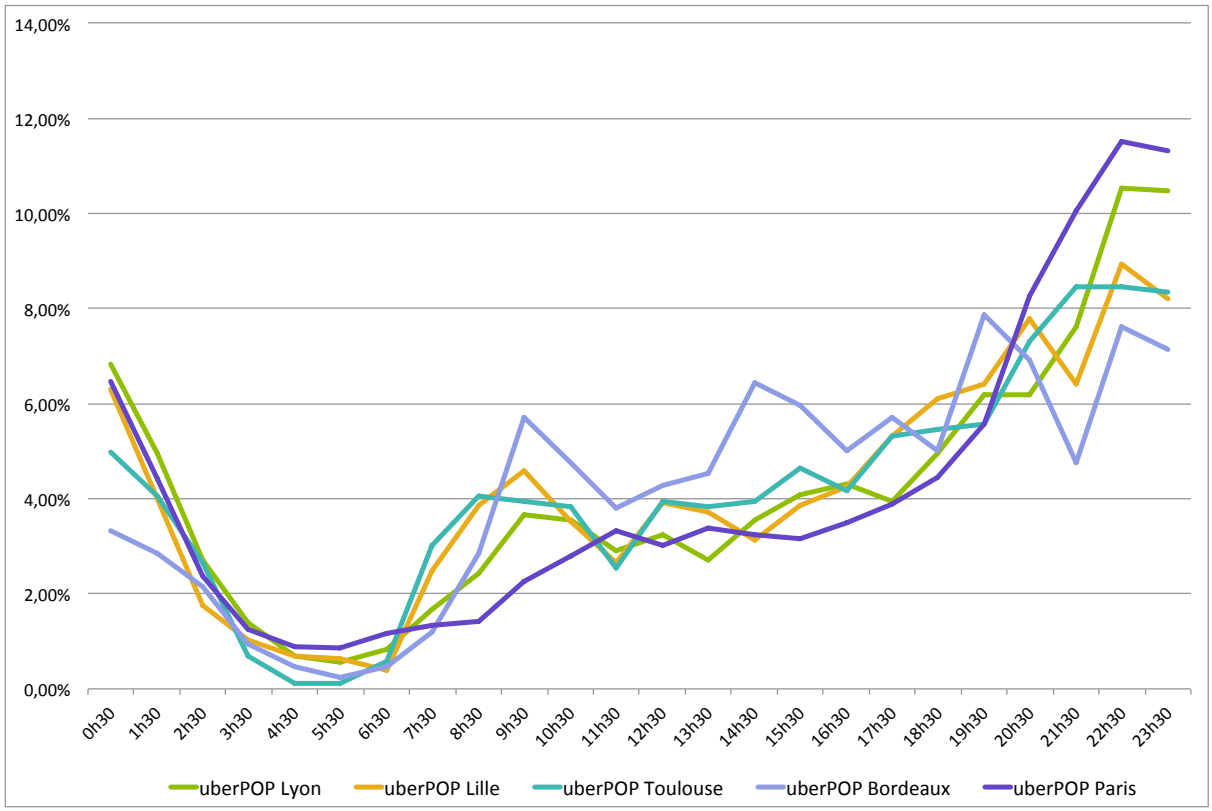
The relation is very significant.
Some modalities have been groupedelements over (under) represented are coloured.



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber in the urban area where they reside.

We observe fewer differences between urban areas than those due to the type of service available in the area. This is shown in this graph produced from data concerning the use of Uber services (calculated by 10-minute time periods) obtained in the different urban areas on 10, 17, 24 and 31 March 2015. These data provided by Uber were then aggregated to calculate the proportion of travel by the hour. Each point of the curves placed at a half hour is valid for the hour around it, so that the sum of the 24 values at the "hour and a half" points of the x axis is equal to 100%. Thus, use is conditioned more by the service offered than the urban area in itself.

Figure 39: Comparison of the use of the uberPOP service on weekdays depending on the urban area studied



Source: compiled by 6t-bureau de recherche from data supplied by Uber and obtained on 10, 17, 24 and 31 March 2015

Comparison in relation to taxi users

Two major types of users of private hire services appear:

- **the under-30s, students or young professionals, using peer-to-peer transportation services on a private basis,**
- **older users, who are predominantly male and belong to higher socio-professional categories, using licensed transportation services both on a private and professional basis.**

However, we do not observe these types when examining taxi users in France. According to the results of a survey of a thousand taxi users in France (6t-bureau de recherche, 2015)[13], taxi users

[13] A self-administered online survey carried out on June 2015 with a sample of 1,001 respondents having used a taxi in the previous three months. The respondents were recruited by quotas via an access panel as a function of the size of the urban area where they reside: 287 live in communities of less than 100,000 inhabitants, 232 in urban areas with more than 100,000 inhabitants and 372 in the Ile-de-France region.

are predominantly women (57% of the sample), whereas it is the opposite among the users of private hire services (54% men); **this can be partially explained by a higher rate of possession of smartphones among men**[14].

Users of private hire services are younger than taxi users: their average age is 32 compared with 42 for taxi users. Nevertheless, users of licensed transportation services have an average age (38 years old) which is close to that of taxi users.

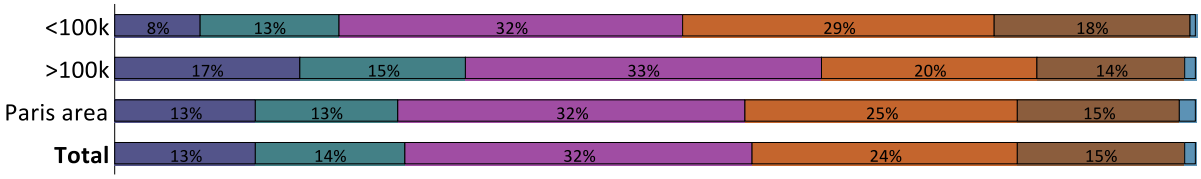
Users under 25 represent 33% of the total sample of private hire services and 44% of the sample of users of peer-to-peer transportation services compared with 17% of the users of licensed transportation services and 13% of the sample of taxi users.

Consistent with their age, the users of private hire services are more likely to live alone (42%) than taxi users (27%).

Figure 40: Distribution by age group of taxi users in France

	Less than 25	From 25 to 29	From 30 to 44	From 45 to 59	From 60 to 74	75 and more	Total
<100k	23	37	91	83	52	1	287
>100k	59	52	113	68	47	3	342
Paris area	49	49	119	94	56	5	372
Total	**131**	**138**	**323**	**245**	**155**	**9**	**1001**

p = **0.03** ; Khi2 = **20.19** ; dof = **10** (**S**)



Source: 6t-bureau de recherche, 2015, online survey of 1,001 taxi users in France

Although retirees are very poorly represented among users of private hire services (1% of the sample), slightly more if we only take into account licensed transportation services (3%), **they are well represented among taxi users (13%) but less than for the French population as a whole (25%).** This can be partially explained by a lower rate of possession of smartphones among retirees[15].

[14] 49% of French males of 12 and above have a smarphone against 43% of French females (CREDOC, 2014, *La diffusion des technologies de l'information et de la communication dans la société française*, p.51).

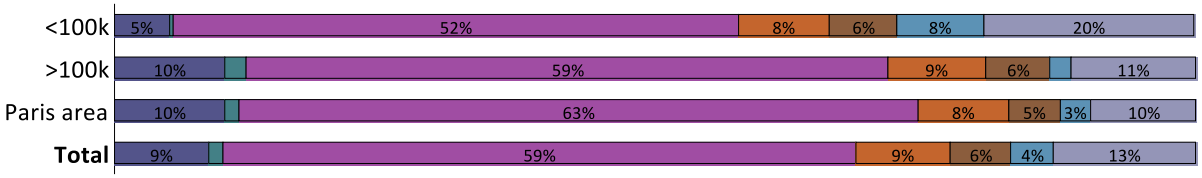
[15] 26% of the French population between 60 and 69 years old have a smarphone against 81% of the 18-24 and 46% of the French population of 12 and above (CREDOC, 2014, *La diffusion des technologies de l'information et de la communication dans la société française*, p.51).

In contrast, students are heavily represented among the users of private hire services (25%), whereas they only account for 9% among taxi users, which more or less corresponds to the proportion of students in the French population. The proportion rises to 34% among the users of peer-to-peer transportation services, whereas they only account for 12% among the users of licensed transportation services.

Figure 41: Distribution by activity of taxi users in France

	In training (student)	In training (work/ study program)	Active full time (+ 32hr/week)	Active part-time (up to 32hr/week)	Looking for emplo yment	Homem aker	Retired	**Total**
<100k	15	1	150	24	18	23	56	287
>100k	35	7	203	31	20	7	39	342
Paris area	38	5	234	31	18	10	36	372
Total	88	13	587	86	56	40	131	1001

p = **<0.01** ; Khi2 = **42.79** ; dof = **12** (**VS**)



Source: 6t-bureau de recherche, 2015, online survey of 1,001 taxi users in France

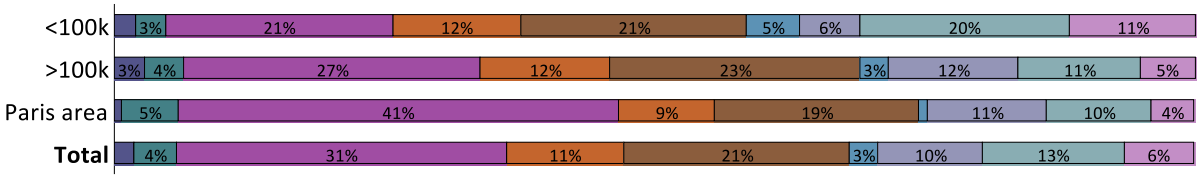
Apart from students (25% of the sample), the users of private hire services belong to higher socio-professional categories (39%). This proportion rises to 48% for the users of licensed transportation services (compared with 26% among the users of peer-to-peer transportation services).

The distribution by socio-professional category is less pronounced among taxi users in France. Higher socio-professional categories are more likely to take a taxi (31%), followed by employees (21%) and then the intermediate professions (11%) and retirees (13%).

Figure 42: Distribution of taxi users in France by socio-professional category

	Craftsman, shopkeeper	Company manager	Manager, higher intellectual profession	Middle-level profession	Employee	Worker	Student	Retired	No professional activity	Total
<100k	6	8	60	34	60	14	16	56	33	287
>100k	10	12	94	41	79	9	41	39	17	342
Paris area	3	19	152	33	70	3	41	36	15	372
Total	19	39	306	108	209	26	98	131	65	1001

p = **<0.01** ; Khi2 = **79.71** ; dof = **16** (**VS**)



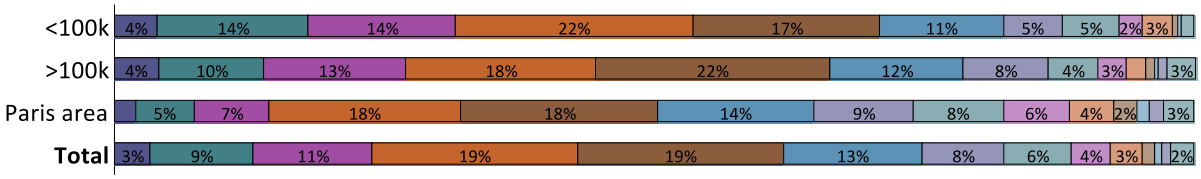
Source: 6t-bureau de recherche, 2015, online survey of 1001 taxi users in France

The income of taxi users excluding students is close to those of the users of private hire services excluding students. The median income also lies between €3,001 and €4,000 net per month.

Figure 43: Distribution of taxi users in France by level of income excluding students

	<100k	>100k	Paris area	Total
Less than 900	4%	4%	2%	3%
Entre 900 et 1500	14%	10%	5%	9%
From 1,501 to 2,000	14%	13%	7%	11%
From 2,001 to 3,000	22%	18%	18%	19%
From 3,001 to 4,000	17%	22%	18%	19%
From 4,001 to 5,000	11%	12%	14%	13%
From 5,001 to 6,000	5%	8%	9%	8%
From 6,001 to 7,000	5%	4%	8%	6%
From 7,001 to 8,000	2%	3%	6%	4%
From 8,001 to 9,000	3%	2%	4%	3%
From 9,001 to 10,001	0.4%	0.7%	2%	1%
From 10,001 to 11,000	0.4%	0.4%	1%	0.6%
From 11,001 to 12,000	0%	0.7%	1%	0.8%
12,001 or more	1%	3%	3%	2%
Total	**100%**	**100%**	**100%**	

p = **0.004** ; Khi2 = **49.48** ; dof = **26** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 795 non-student respondents having agreed to declare their income. Online survey of 1,001 taxi users in France

57% of taxi users use them for private purposes only. This is a little less than the users of private hire services, 62% of whom use taxis for private reasons. If we only take into consideration the users of peer-to-peer transportation services, 83% only use taxis for private reasons (compared with 52% of the users of licensed transportation services).

Figure 44: Distribution of taxi users in France by type of use (private/professional)

	Privately	Privately and professionally	Only professionally	Total
<100k	179	79	29	287
>100k	184	123	35	342
Paris area	206	142	24	372
Total	**569**	**344**	**88**	**1001**

p = **0.02** ; Khi2 = **11.66** ; dof = **4** (**S**)

Source: 6t-bureau de recherche, 2015, online survey of 1001 taxi users in France

Characteristics of users according to the possession of a driving license

The users of private hire services are a little less likely to hold a driving license (20% compared with 17% of the French population, ENTD data 2008).

Figure 45: Distribution of users by possession of a driving license

	Nbr	IC
With driving license	**5151**	**79% < f < 80%**
Without driving license	**1325**	**20% < f < 21%**
Total	**6476**	

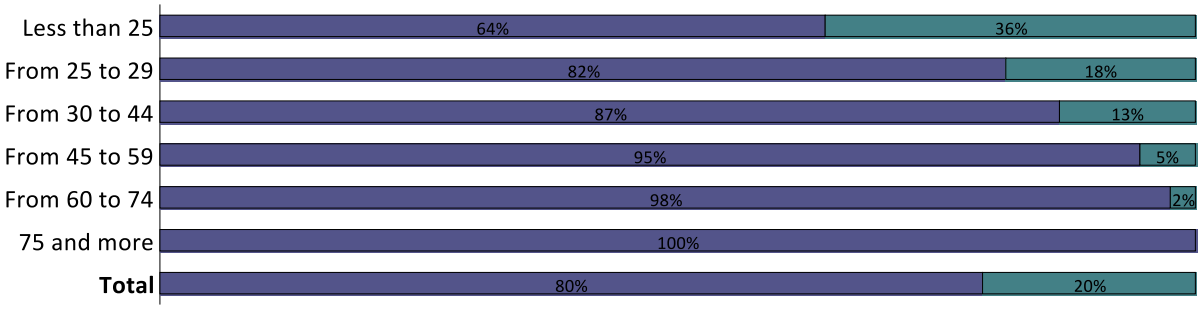
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

This is partially explained by the fact that the proportion of users under the age of 25 (33%) is greater than their weight in the French population and because **the proportion of users without a license is greater among the under-25s** (36% compared with 20% of all users).

Figure 46: Distribution of users by age depending on the possession of a driving license

	With driving license	Without driving license	Total
Less than 25	1393	774	**2167**
From 25 to 29	1166	261	**1427**
From 30 to 44	1632	245	**1877**
From 45 to 59	730	40	**770**
From 60 to 74	210	5	**215**
75 and more	20	0	**20**
Total	**5151**	**1325**	**6476**

p = **<0.01** ; Khi2 = **536.24** ; dof = **5** (**VS**)



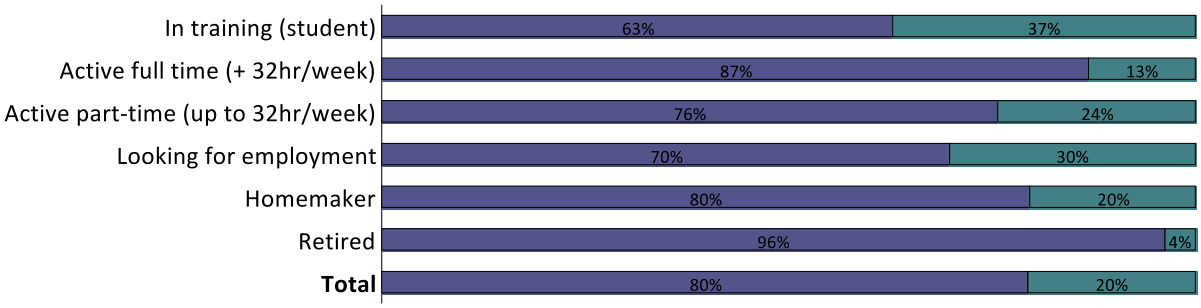
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

In correlation with their age, there are more users without a driving license among students: 37% of students who use private hire services do not have a license. It is also interesting to note that users without licenses are relatively numerous among job seekers; private hire services may appear as a recourse for the mobility of people in precarious situations.

Figure 47: Distribution of users by activity depending on the possession of a driving license

	With driving license	Without driving license	Total
In training (student)	1030	609	1639
Active full time (+ 32hr/week)	3468	517	3985
Active part-time (up to 32hr/week)	287	92	379
Looking for employment	207	89	296
Homemaker	55	14	69
Retired	104	4	108
Total	**5151**	**1325**	**6476**

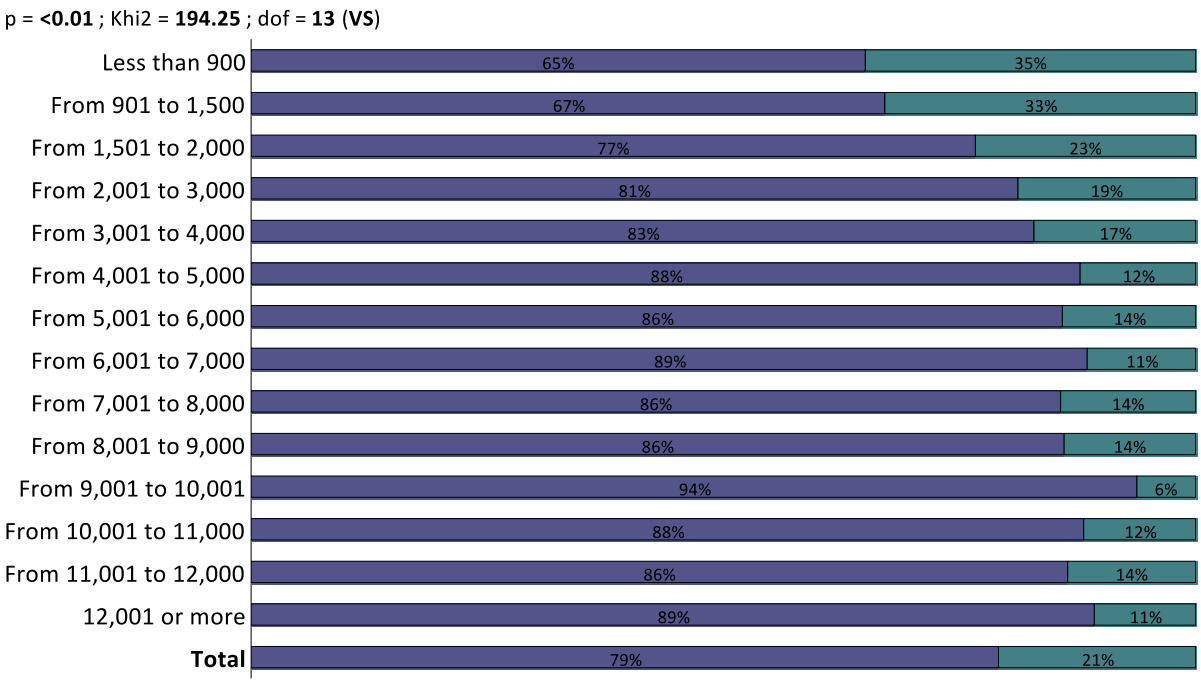
p = **<0.01** ; Khi2 = **456.82** ; dof = **5** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Finally, users without a license logically have modest incomes. Thus 35% of users in households earning less than €1,500 euros per month do not have driving licenses, compared with 20% of all users.

Figure 48: Percentage of users by income depending on the possession of a driving license

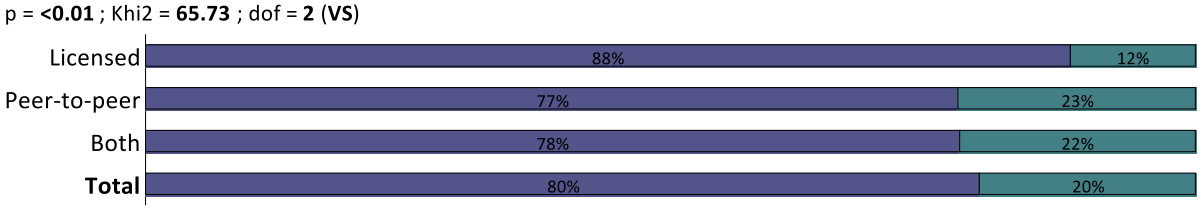


Source: 6t-bureau de recherche, 2015, sample of 4,369 respondents in France having already used Uber and having agreed to declare their income.

The proportion of users without licenses who use peer-to-peer transportation services or both is greater than that of those who exclusively use licensed transportation services (23% or 22% compared with 12%). This corresponds to the profile of users of peer-to-peer transportation services: younger people and students with lower incomes.

Figure 49: Distribution of users by service used depending on the possession of a driving license

	With driving license	Without driving license	Total
Licensed	1036	139	1175
Peer-to-peer	1117	325	1442
Both	2998	861	3859
Total	**5151**	**1325**	**6476**



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Thus, unlike car-sharing services for which it is necessary to hold a driving license, the use of private hire services enables users who cannot drive to benefit from the advantages of the automobile. Private hire services thus prove to be a real alternative for users without a license.

IN SHORT: THE PROFILE OF UBER USERS

Two profiles of users of private hire services emerge depending on the type of service they use.

Users of peer-to-peer transportation services are predominantly students or young employed people under 30 years old, living alone or as a couple without children and with modest incomes, and more than a third of the under-25s do not possess a driving license. They use these services predominantly for private purposes.

Users of licensed transportation services are older, better educated, more affluent and are more likely to live as a couple with children. They use these services for both private and professional reasons.

The profile of users using both types of service is closer to that of the users of peer-to-peer transportation services. They are slightly older, better educated and less likely to live alone. They use these services for both private and professional reasons.

The users from French urban areas other than Paris distinguish themselves from users of the Paris and Swiss urban areas. Users from Swiss urban areas are older and more affluent than the sample as a whole, reflecting the specificity of Switzerland in relation to France as well as the lesser proportion of students among their users.

Users of these services have specific profiles when compared with taxi users. They are younger than taxi users. They are either students or managers or belong to higher intellectual professions, while taxi users belong to all socio-professional categories and only half of them use taxis exclusively for private reasons.

1.2. PROFILE OF THE JOURNEYS

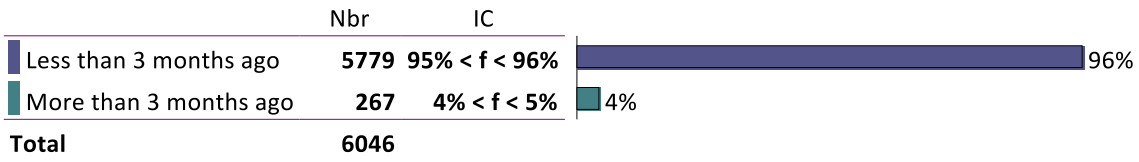
Overview and analysis of all journeys

This section aims to qualify and quantify the journeys made by users via the services of the Uber application. It is based on the characteristics of the most recent journey made via an Uber service (see the questionnaire in Annex 1).

The 6,476 respondents in our sample were invited to describe the characteristics of the most recent journey that they had made with a licensed or peer-to-peer transportation service. **6,046 of them, i.e. 93% of the sample, had made their most recent journey with an Uber service in one of the urban areas studied.** The study of the characteristics of travel with Uber is based on this sub-sample of 6,046 respondents.

96% of this sub-sample had made their most recent journey with Uber in the previous three months, which ensures the reliability of the responses.

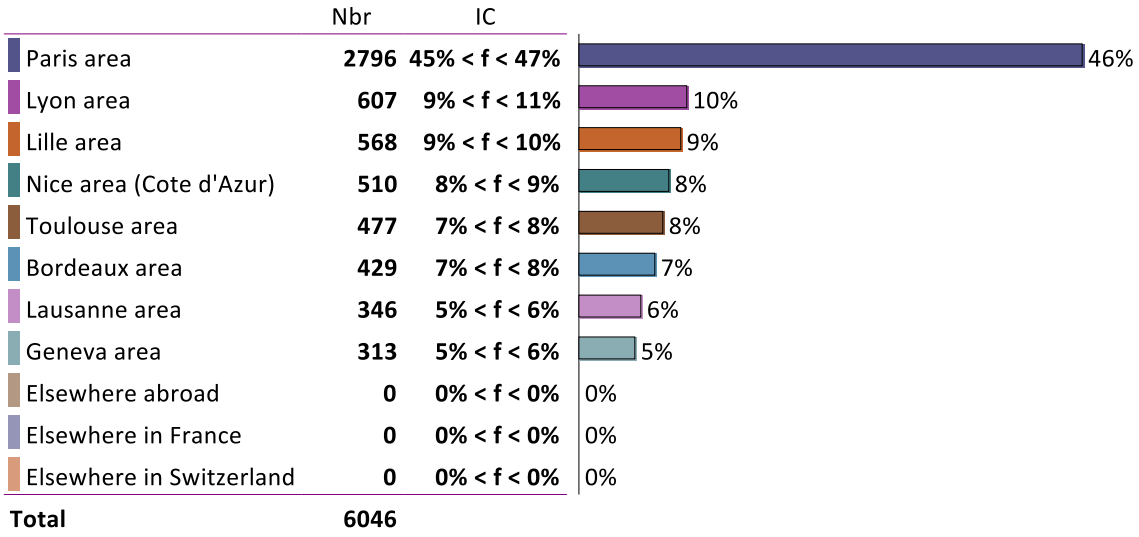
Figure 50: Date of the most recent journey with Uber



Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

46% of the users selected had made their most recent journey with Uber in the Paris urban area. However, the numbers of users who had made their most recent journey in the urban areas studied is sufficient to obtain meaningful data on the scale of each of these urban areas.

Figure 51: Urban area where the most recent journey with Uber was made

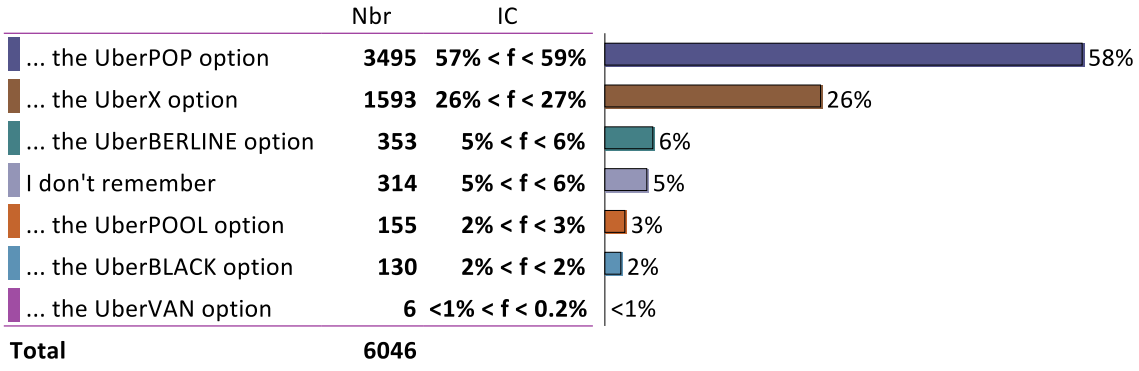


Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

Journeys principally made with peer-to-peer transportation services in the urban area of residence

The vast majority of journeys (63%) was made with a peer-to-peer transportation service. If we look at the options chosen in more detail, we note that **58% of the travel described had been made with the uberPOP option and 26% with the UberX option**. The other options, which are less well established in the urban areas studied, received a smaller proportion of responses: 6% for BERLINE, 3% for uberPOOL, 2% for uberBLACK and 0.1% for VAN.

Figure 52: Option chosen for the most recent journey with Uber



Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

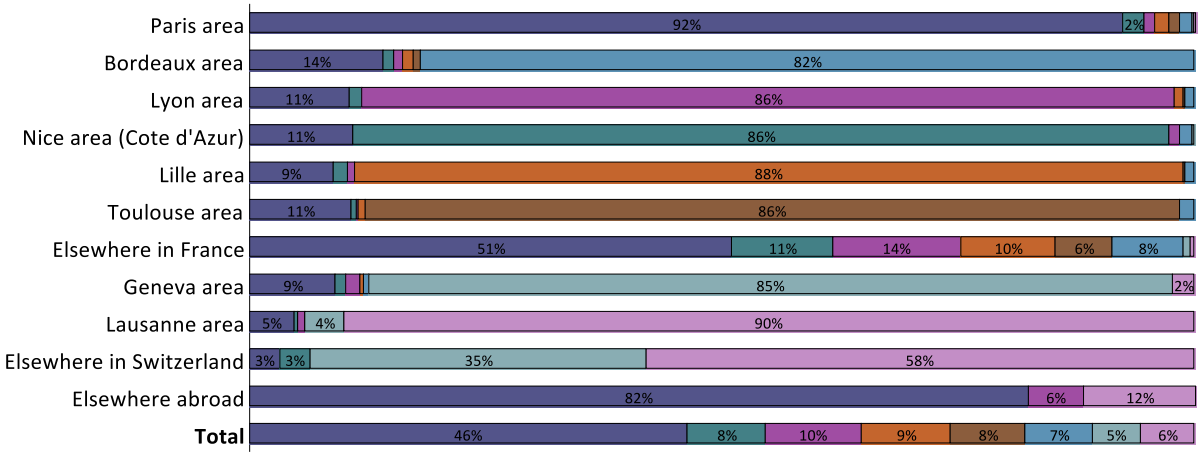
84% of the journeys described were carried out in the respondent's area of residence. The rows of the table below present the users' urban areas of residence selected for the description of the most recent journey made, and the columns present the urban area where they carried out their most recent journey with Uber. Thus, 92% of users residing in the Paris urban area had also made their most recent journey there. **Between 82 and 90% of users** residing in another urban area in France or Switzerland **had also made their most recent journey in the urban area where they reside**. When these users had not made their most recent trip in the urban area where they reside, they had for the most part made it in the Paris area. Half of the users who reside in France but outside of the urban areas studied had made their most recent trip in Paris (51%). The numbers of users residing "elsewhere in Switzerland" or "elsewhere abroad" (last two columns of the table) are shown for informational purposes but are too low to obtain statistically reliable results.

Users use these services above all in the urban area where they reside. The journeys made with these services are therefore ingrained in everyday mobility behavior: residents integrate these services among the range of possibilities available in their urban area. **This is also the case for taxi users, but to a lesser extent: thus, 64% of users surveyed had made their most recent journey in the urban area where they reside.**

Figure 53: Detailed intersection of the most recent journey made and the urban area of residence

	Paris area	Nice area (Cote d'Azur)	Lyon area	Lille area	Toulouse area	Bordeaux area	Geneva area	Lausanne area	Total
Paris area	2328	59	29	37	28	35	5	1	2522
Bordeaux area	60	5	4	5	3	348	0	0	425
Lyon area	64	8	520	6	1	5	0	1	605
Nice area (Cote d'Azur)	50	394	5	0	0	6	1	0	456
Lille area	50	8	5	491	1	6	0	0	561
Toulouse area	54	3	1	3	429	8	0	0	498
Elsewhere in France	128	27	34	25	15	19	2	1	251
Geneva area	30	4	5	1	0	2	280	8	330
Lausanne area	17	1	3	0	0	0	14	315	350
Elsewhere in Switzerland	1	1	0	0	0	0	11	18	31
Elsewhere abroad	14	0	1	0	0	0	0	2	17
Total	2796	510	607	568	477	429	313	346	6046

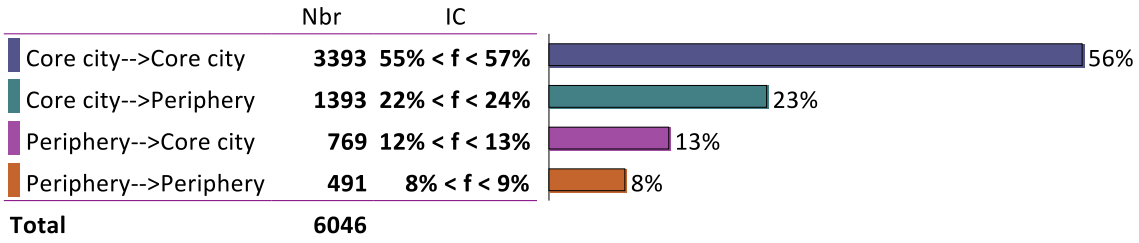
p = **<0.01** ; Khi2 = **30612.06** ; dof = **70** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

Each user was invited to indicate whether the vehicle booked for this journey had picked up and dropped off the user inside or outside the core city of the urban area. This information indicated that **56% of the travel described took place within the core city of the urban area**. As a result, **nearly half of the travel described had at least the pick-up or drop-off point in a suburban area**. Twenty-three percent of the journeys described took place from a core city towards its periphery and 13% from the periphery to the core city. **These services therefore enable the connection of core cities with their peripheries.** On the other hand, these services are less used for journeys within the peripheral areas: they represent 8% of all journeys.

Figure 54: Pick-up and drop-off point of the most recent journey with Uber



Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

The distributions between the core and peripheral areas vary from one urban area to another and reflect the size of the core city. Thus, Lille is a small urban area (34 km^2): only 44% of the travel in the Lille urban area is within the city of Lille. Conversely, Toulouse extends over an area (118 km^2) that is more than three times that of Lille. Sixty-six percent of travel in the Toulouse area is within the city of Toulouse.

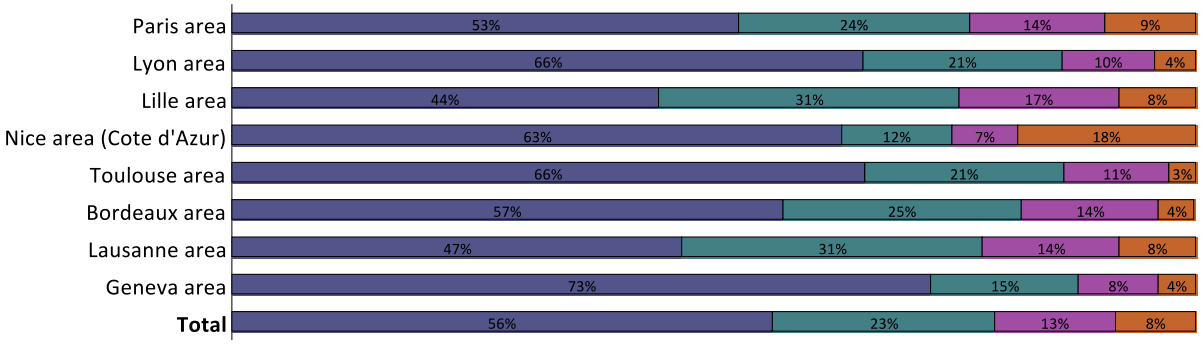
In the Ile-de-France region, 53% of the travel is within Paris compared with 9% which has no link with Paris. This distribution is very close to that of taxi travel in the Ile-de-France region. According to *Bilan des déplacements à Paris en 2013,* 53.3% of taxi travel is within Paris while 7.8% is within the periphery.[16]

[16] See *Bilan des déplacements à Paris en 2013* p. 38: the data are established from a sample of 24,147,070 journeys conducted in the Ile-de-France region (source: *syndicat professionnel des centraux radio de taxis de Paris et de la région parisienne*).

Figure 55: Pick-up and drop-off point of the most recent journey with Uber by urban area

	Core city-->Core city	Core city-->Periphery	Periphery-->Core city	Periphery-->Periphery	Total
Paris area	1471	671	395	259	2796
Lyon area	398	126	58	25	607
Lille area	252	177	94	45	568
Nice area (Cote d'Azur)	323	59	34	94	510
Toulouse area	314	98	52	13	477
Bordeaux area	246	106	61	16	429
Lausanne area	162	108	49	27	346
Geneva area	227	48	26	12	313
Total	**3393**	**1393**	**769**	**491**	**6046**

p = **<0.01** ; Khi2 = **286.15** ; dof = **21** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

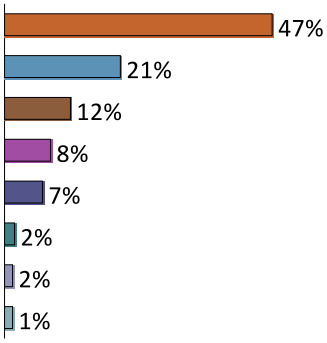
Inexpensive travel for recreational purposes

Almost half of the travel was for recreational purposes (restaurant, cinema, nightclub, etc.). The second most common reason concerned travel links with a train station or airport (21%). This is followed by visits to relatives (12%), business travel (8%), and journeys between home and the place of work or study (7%). Finally, two types of reasons were too infrequently mentioned for extensive analysis: the reason "shopping or purchases" (2%) as well as access to medical services (2%).

This distribution reflects a specialization of private hire services for travel related to recreation. At the national level, this type of travel represents 4% of the total journeys totals made by the French during the week, and those for reasons of a visit to family or friends represent 10% (ENDT, 2008). **Conversely, private hire services are infrequently used for travel between home and work or studies (7%), even though this is the main reason for travel in France (31% of all travel).**

Figure 56: Reason for the most recent journey with Uber

	Nbr	IC
Going out (restaurant, cinema, night club, etc.)	2862	46% < f < 48%
To or from a station/airport	1258	20% < f < 22%
A visit to the family, friends	715	11% < f < 12%
A professional trip	502	8% < f < 9%
Rides from home-work / studies	406	6% < f < 7%
For shopping or purchases	122	2% < f < 2%
To go to medical services	92	1% < f < 2%
Other	89	1% < f < 2%
Total	6046	



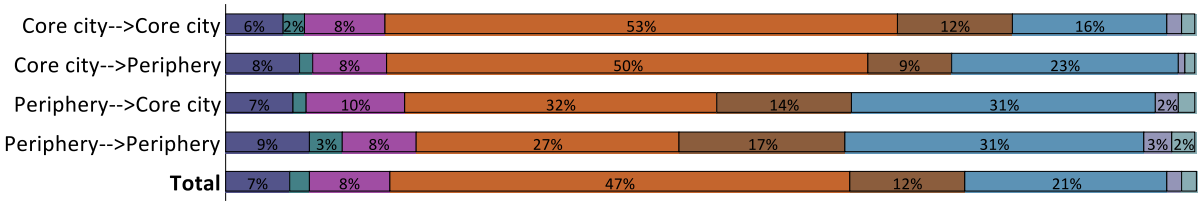
Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

Recreational outings are the main reason for travel within core cities (53%) while access to a station (there are no airports in the core cities studied) represents only 16%. In contrast, the main reason for travel within peripheral areas concerns access to a railway station or airport (31%), followed by travel for recreational outings (27%).

Figure 57: Pick-up and drop-off point of the most recent journey with Uber by reason for travel

	Rides from home-work / studies	For shopping or purchases	A professional trip	Going out (restaurant, cinema, night club, etc.)	A visit to the family, friends	To or from a station/ airport	To go to medical services	Other	Total
Core city-->Core city	202	76	279	1792	404	541	52	47	3393
Core city-->Periphery	107	19	107	690	120	326	8	16	1393
Periphery-->Core city	54	11	78	247	107	240	18	14	769
Periphery-->Periphery	43	16	38	133	84	151	14	12	491
Total	406	122	502	2862	715	1258	92	89	6046

p = **<0.01** ; Khi2 = **279.20** ; dof = **21** (**VS**)

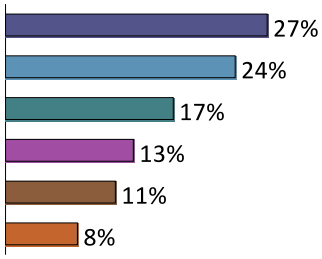


Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

The main time slots during which this travel is carried out are during the day on weekdays (27% of the travel described), and during the night at weekends (24%). This is followed by travel during weekday evenings (17%), and then travel at night during the week (13%). The slots which group the fewest journeys are the evenings during the weekend (11%) and during the day at weekends (8%).

Figure 58: Time of the most recent journey with Uber

	Nbr	IC
During the week, between 8 a.m. and 8 p.m.	**1619**	**26% < f < 28%**
The weekend, between midnight and 8 a.m.	**1433**	**23% < f < 24%**
During the week, between 8 p.m. and midnight	**1049**	**17% < f < 18%**
During the week, between midnight and 8 a.m.	**803**	**13% < f < 14%**
The weekend, between 8 p.m. and midnight	**686**	**11% < f < 12%**
The weekend, between 8 a.m. and 8 p.m.	**456**	**7% < f < 8%**
Total	**6046**	



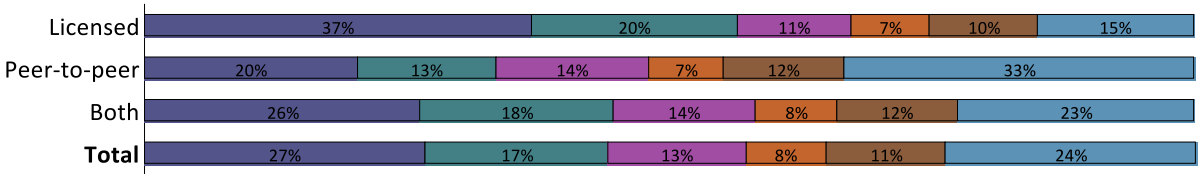
Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

Peer-to-peer transportation services are especially in demand at night. Thus, 33% of the journeys made with peer-to-peer transportation services take place after midnight on weekends. If we include weekdays, the night market represents 47% of the journeys made with peer-to-peer transportation services, compared with 26% of all journeys with licensed drivers and 37% of all journeys.

Figure 59: Time of the most recent journey with Uber by service used

	During the week, between 8 a.m. and 8 p.m.	During the week, between 8 p.m. and midnight	During the week, between midnight and 8 a.m.	The weekend, between 8 a.m. and 8 p.m.	The weekend, between 8 p.m. and midnight	The weekend, between midnight and 8 a.m.	**Total**
Licensed	389	208	114	**79**	**109**	157	**1056**
Peer-to-peer	286	185	**203**	**100**	**162**	468	**1404**
Both	**944**	656	**486**	**277**	**415**	808	**3586**
Total	**1619**	**1049**	**803**	**456**	**686**	**1433**	**6046**

p = **0.00** ; Khi2 = **181.04** ; dof = **10** (**VS**)



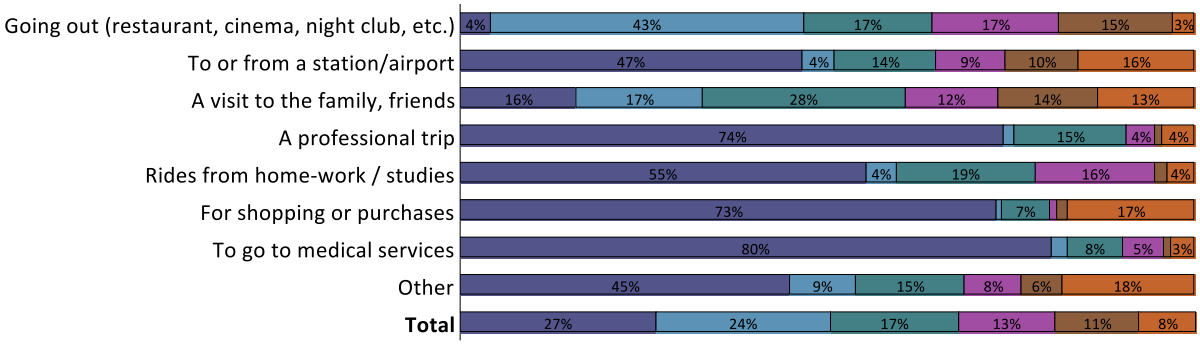
Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

Travel after midnight at weekends is overrepresented among recreational outings (43% compared with 24% for all reasons), while travel during the day, week or weekend is overrepresented among journeys linking with a train station or airport (63%, compared with 35%). Journeys in the evening during the week, as well as during the day at the weekend, are overrepresented among visits to friends and relatives (28% compared with 17%; 13% compared with 8%). As expected, travel during weekdays is overrepresented among business journeys, commuting, shopping and purchases as well as travel for medical care (between 55 and 80% of trips depending on the reason, compared with 27% for all reasons). Travel for shopping and purchases logically also include a high proportion of daytime weekend travel (17% compared with 8%).

Figure 60: Time of the most recent journey with Uber depending on the reason

	During the week, between 8 a.m. and 8 p.m.	The week end, between midnight and 8 a.m.	During the week, between 8 p.m. and midnight	During the week, between midnight and 8 a.m.	The week end, between 8 p.m. and midnight	The week end, between 8 a.m. and 8 p.m.	**Total**
Going out (restaurant, cinema, night club, etc.)	119	1220	498	497	443	85	**2862**
To or from a station/airport	587	55	173	118	125	200	**1258**
A visit to the family, friends	114	123	197	89	98	94	**715**
A professional trip	371	8	76	20	5	22	**502**
Rides from home-work / studies	225	16	77	66	7	15	**406**
For shopping or purchases	89	1	8	1	2	21	**122**
To go to medical services	74	2	7	5	1	3	**92**
Other	40	8	13	7	5	16	**89**
Total	**1619**	**1433**	**1049**	**803**	**686**	**456**	**6046**

p = **<0.01** ; Khi2 = **2974.19** ; dof = **35** (**VS**)



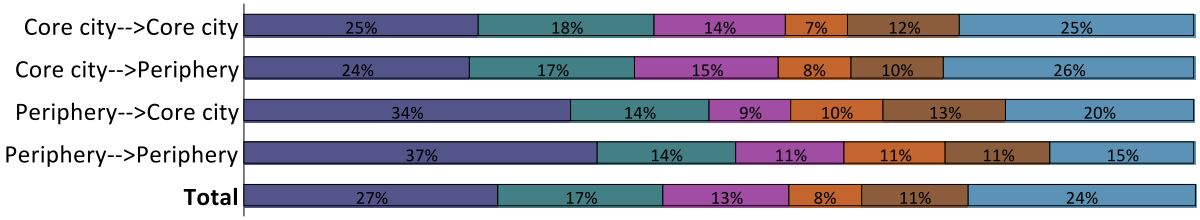
Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with

Travel linking with the center is more often carried out at night, while travel between peripheral areas is more frequent during the daytime on weekdays.

Figure 61: Time of the most recent journey with Uber depending on the pick-up and drop-off point

	During the week, between 8 a.m. and 8 p.m.	During the week, between 8 p.m. and midnight	During the week, between midnight and 8 a.m.	The weekend, between 8 a.m. and 8 p.m.	The weekend, between 8 p.m. and midnight	The weekend, between midnight and 8 a.m.	Total
Core city-->Core city	839	627	470	221	398	838	3393
Core city-->Periphery	332	240	211	108	135	367	1393
Periphery-->Core city	265	111	66	75	99	153	769
Periphery-->Periphery	183	71	56	52	54	75	491
Total	**1619**	**1049**	**803**	**456**	**686**	**1433**	**6046**

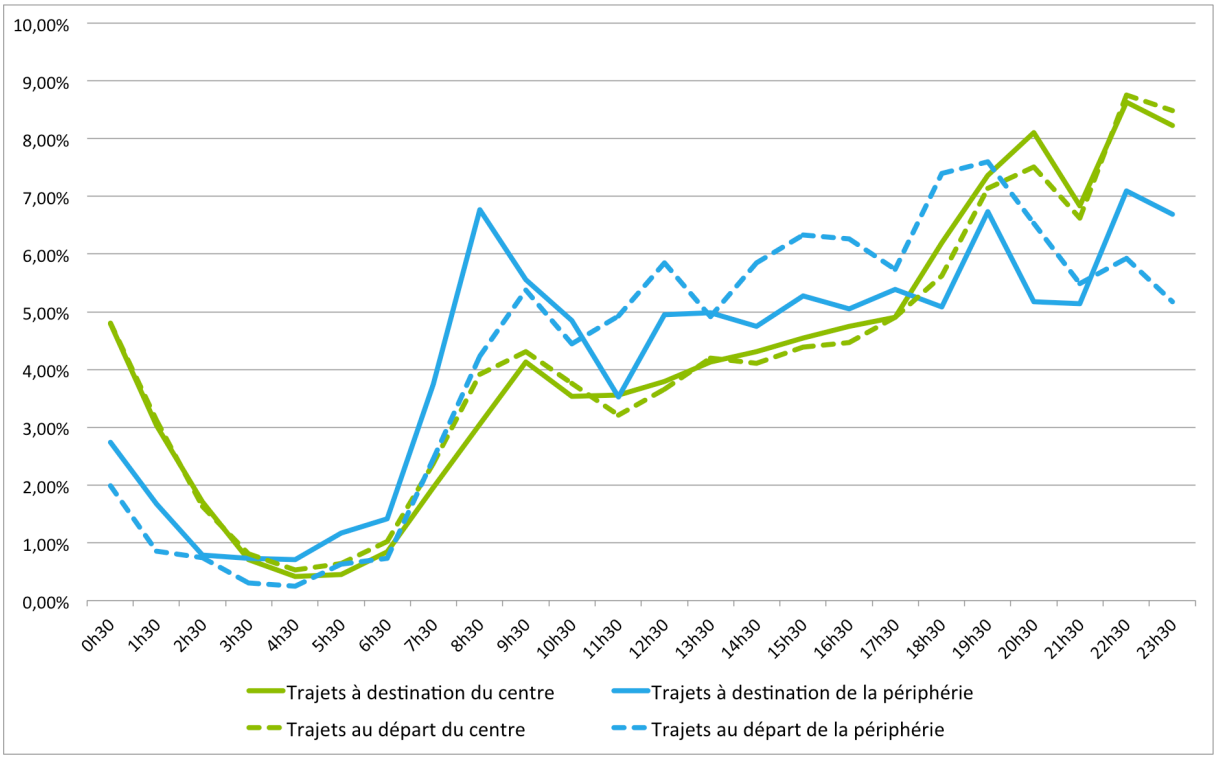
p = **<0.01** ; Khi2 = **120.43** ; dof = **15** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

The analysis of the data provided by Uber points in the same direction: we note that travel with a pick-up or drop-off point in peripheral areas is mainly carried out during the day, while travel with a pick-up or drop-off point in the center is more concentrated at night. This suggests that Uber services are used to complement public transport which is absent or not very efficient in peripheral areas both during the day and night, while public transport is only absent or not very efficient in the core city at night.

Figure 62: Average distribution of Uber journeys during the day by pick-up and drop-off points (during the week in France)



Source: 6t-bureau de recherche, compiled from data supplied by Uber (all services considered) obtained on 10, 17, 24 and 31 March 2015

The duration of 90% of the travel described was under 30 minutes, 44% of which lasted less than 15 minutes and 46% between 15 and 30 minutes. **The average declared duration[17] of a journey with a private hire service is 20 minutes**. This corresponds to the average time recorded by the Uber application[18].

Journeys lasting less than a quarter of an hour are overrepresented among recreational outings (54% of journeys for this reason, compared with 44% of all journeys). Journeys over 15 minutes are overrepresented among the journeys linking stations and airports (70% compared with 54%), and the same applies to professional travel (73% compared with 54%).

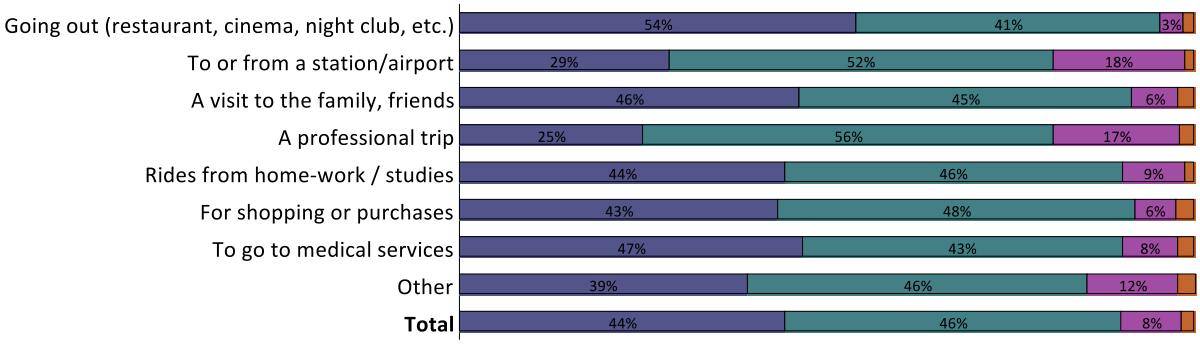
[17] The respondents had to choose intervals of duration and the average was calculated from a method that assigned each answer a value corresponding to the median of the bracket in which it is situated. The same method was used to calculate the average range and the average cost of travel with a private hire service.

[18] Source: Uber on 10 July 2015.

Figure 63: Duration of the most recent journey with Uber by reason for travel

	Less than 15 minutes	Between 16 and 30 minutes	More than 30 minutes	I don't remember	Total
Going out (restaurant, cinema, night club, etc.)	1548	1180	86	48	2862
To or from a station/airport	359	657	226	16	1258
A visit to the family, friends	330	323	45	17	715
A professional trip	126	280	86	10	502
Rides from home-work / studies	180	186	35	5	406
For shopping or purchases	53	59	7	3	122
To go to medical services	43	40	7	2	92
Other	35	41	11	2	89
Total	**2674**	**2766**	**503**	**103**	**6046**

p = **<0.01** ; Khi2 = **507.19** ; dof = **21** (**VS**)



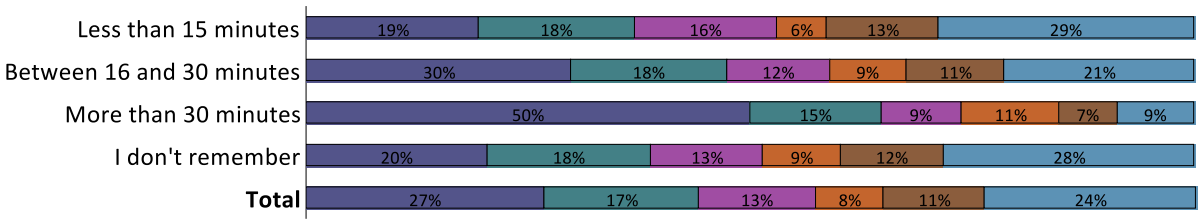
Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

Journeys of less than a quarter of an hour are more frequent at night than other durations (45% of all journeys of less than a quarter of an hour take place between midnight and 8 a.m., compared with 37% of all journeys). Conversely, journeys of more than 30 minutes are usually made during the day (in 61% of cases).

Figure 64: Duration of the most recent journey by time of day

	During the week, between 8 a.m. and 8 p.m.	During the week, between 8 p.m. and midnight	During the week, between midnight and 8 a.m.	The weekend, between 8 a.m. and 8 p.m.	The weekend, between 8 p.m. and midnight	The weekend, between midnight and 8 a.m.	Total
Less than 15 minutes	521	469	425	153	337	769	2674
Between 16 and 30 minutes	826	486	320	239	304	591	2766
More than 30 minutes	251	75	45	55	33	44	503
I don't remember	21	19	13	9	12	29	103
Total	**1619**	**1049**	**803**	**456**	**686**	**1433**	**6046**

p = **<0.01** ; Khi2 = **315.65** ; dof = **15** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

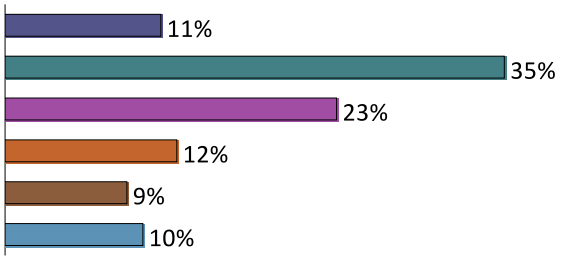
According to the statements of the users, half of the journeys made (50%) are for less than 6 kilometers, 12% of which are less than 3 kilometers, which means they could have been carried out on foot or by bicycle. Journeys of over 10 kilometers represent 22% of the travel analyzed. This is consistent with the declared durations.

The average distance of a journey registered by the Uber application [19] is identical to that declared by the users: 8 kilometers.

[19] Source: Uber on 10 July 2015.

Figure 65: Distance travelled during the most recent journey with Uber

	Nbr	IC
Less than 3 kilometres	286	10% < f < 12%
From 3 to 6 kilometres	915	34% < f < 36%
From 7 to 10 kilometres	609	22% < f < 25%
From 10 to 15 kilometres	316	11% < f < 13%
From 15 to 20 kilometres	224	8% < f < 9%
More than 20 kilometres	253	9% < f < 11%
Total	**2603**	



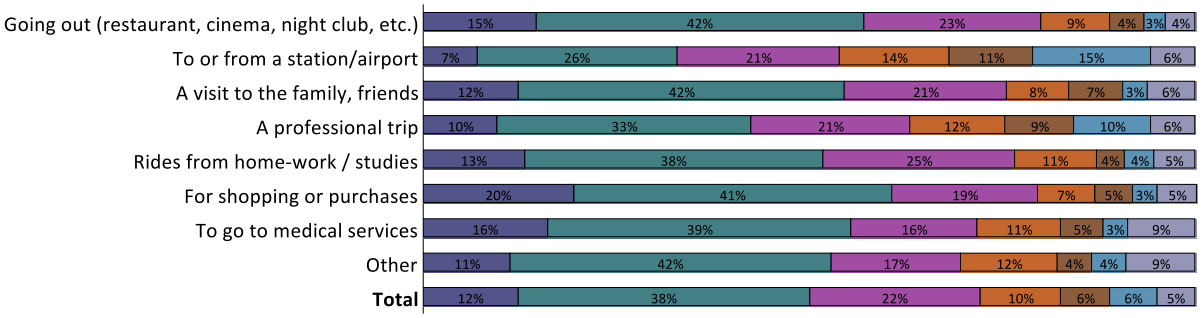
Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

Variations of distance depending on the reason for travel are low. Note, however, that journeys linking train stations and airports generate the longest journeys (61% of journeys over 7 km for this reason, compared with 44% of all journeys made).

Figure 66: Distance travelled during the most recent journey with Uber by reason for travel

	Less than 3 kilom etres	From 3 to 6 kilom etres	From 7 to 10 kilom etres	From 10 to 15 kilom etres	From 15 to 20 kilom etres	More than 20 kilom etres	I don't know	Total
Going out (restaurant, cinema, night club, etc.)	419	1214	653	259	127	76	114	2862
To or from a station/airport	89	325	265	178	136	192	73	1258
A visit to the family, friends	89	301	150	58	49	23	45	715
A professional trip	48	165	103	62	45	50	29	502
Rides from home-work / studies	54	156	101	43	15	15	22	406
For shopping or purchases	24	50	23	9	6	4	6	122
To go to medical services	15	36	15	10	5	3	8	92
Other	10	37	15	11	4	4	8	89
Total	**748**	**2284**	**1325**	**630**	**387**	**367**	**305**	**6046**

p = **<0.01** ; Khi2 = **498.78** ; dof = **42** (**VS**)



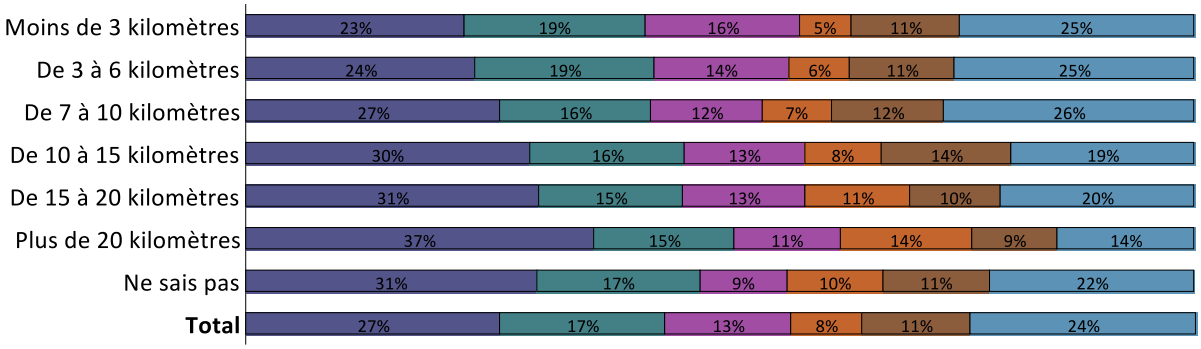
Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

By contrast, variations of distances are significant depending on the time of the journey and highlight the strong modal complementarity between public transport and private hire services. Thus, **41% of all short-distance journeys (less than 3 kilometers), which are possible on foot or by bicycle, take place at night when the offer of public transport is very limited and/or no longer available, depending on the urban area.** Conversely, they represent only 28% during the daytime (compared with 35% of the whole sample).

Figure 67: Distance travelled during the most recent journey with Uber by time of day

	En semaine, entre 8h et 20h	En semaine, entre 20h et minuit	En semaine, entre minuit et 8h	Le week-end, entre 8h et 20h	Le week-end, entre 20h et minuit	Le week-end, entre minuit et 8h	Total
Moins de 3 kilomètres	173	142	122	40	86	185	748
De 3 à 6 kilomètres	553	429	326	145	254	577	2284
De 7 à 10 kilomètres	355	212	155	96	156	351	1325
De 10 à 15 kilomètres	189	102	81	50	86	122	630
De 15 à 20 kilomètres	120	58	50	43	37	79	387
Plus de 20 kilomètres	135	54	41	51	33	53	367
Ne sais pas	94	52	28	31	34	66	305
Total	**1619**	**1049**	**803**	**456**	**686**	**1433**	**6046**

p = **<0,01** ; Khi2 = **125,12** ; ddl = **30** (**TS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

The average reported fare for journeys made within the French urban areas is €15.10. A third of these journeys cost between €5 and €10 and another third between €11 and €20. Twenty-four percent cost over €20 euros while only 8% cost less than €5.

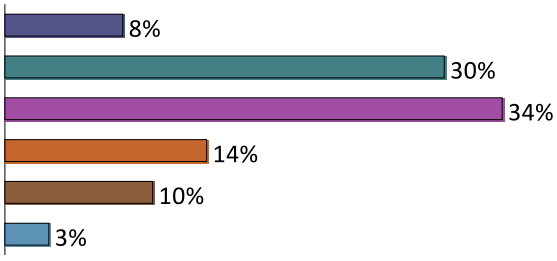
The average reported fare is lower than the average fare registered by the Uber application:

€15.10 compared with €17.70[20]. It is worth noting that users retain an amount that is lower than the reality, which highlights a certain satisfaction in terms of the quality/price ratio.

These amounts ensure the strong competitiveness of travel with Uber. As a reminder, the minimum fare for a taxi journey is €7[21] and the average fare for a single ticket for public transport in the urban areas studied is €1.60. **Knowing that the average occupancy rate of a journey with Uber is 1.8 passengers, the unit cost per Uber user for journeys under €5 is not far from the price of bus or underground fare.**

Figure 68: Cost of the most recent journey with Uber in France

	Nbr	IC
Less than 5 euros	**438**	**8% < f < 9%**
Between 5 and 10 euros	**1631**	**29% < f < 31%**
Between 11 and 20 euros	**1845**	**33% < f < 35%**
Between 21 and 30 euros	**753**	**13% < f < 15%**
More than 30 euros	**554**	**10% < f < 11%**
I don't remember	**166**	**3% < f < 3%**
Total	**5387**	



Source: 6t-bureau de recherche, 2015, sample of 5,387 French respondents from among the sub-sample of 6,046 respondents having made their last journey with an Uber service in one of the urban areas studied

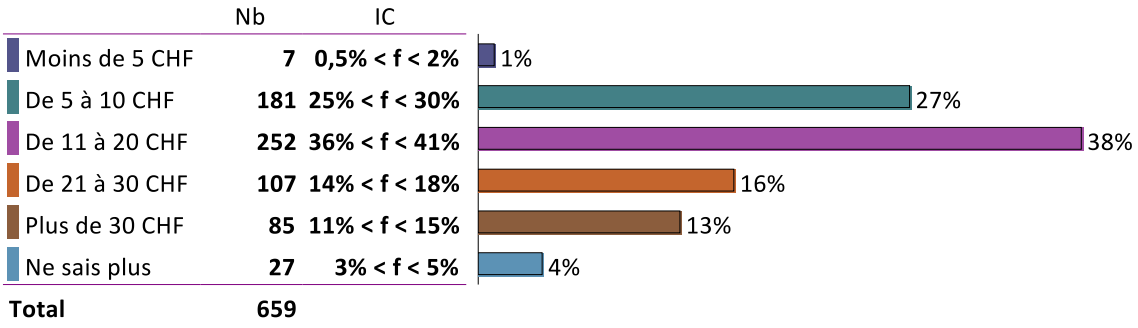
The average reported fare for journeys in Switzerland is CHF16.70 Once again, it is lower than that recorded by the Uber application (CHF18.80[22]), highlighting the tendency of users to under-estimate the price of the journey. Among the journeys made in the Swiss urban areas, 28% cost less than CHF11, 38% cost between CHF11 and CHF20 and 29% cost over CHF20.

[20] Source: Uber on 10 July 2015.

[21] http://vosdroits.service-public.fr/professionnels-entreprises/F22127.xhtml (consulted on 1 July 2015)

[22] Source: Uber on 10 July 2015.

Figure 69: Price of the most recent journey with Uber in Switzerland



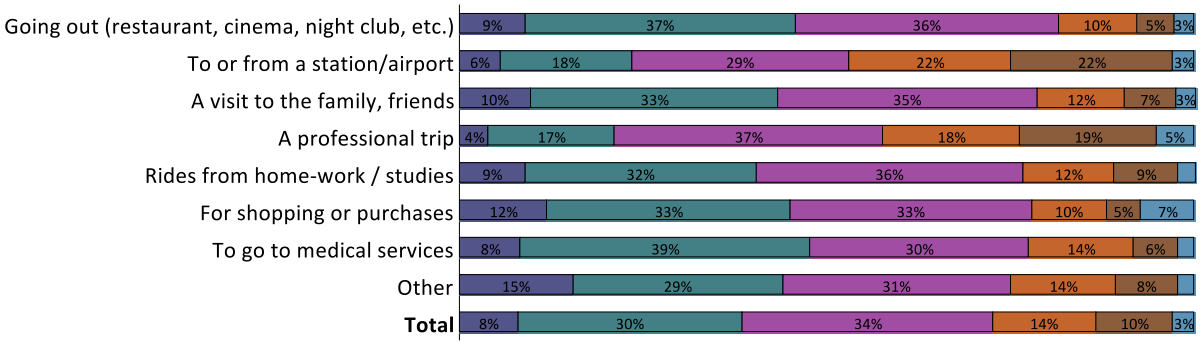
Source: 6t-bureau de recherche, 2015, sample of 659 Swiss respondents from among the sub-sample of 6,046 respondents having made their last journey with an Uber service in one of the urban areas studied

The price of the journeys strongly correlates with their duration. Consequently, journeys made in the French urban areas are overrepresented among journeys for small amounts (82% of journeys under €20, compared with 72% of all journeys). **In contrast, higher amounts are overrepresented among the journeys linking stations and airports** (44% of journeys over €20, compared with 24% of all journeys in France), **as well as for professional travel** (37% of journeys over €20 compared with 24% of all journeys in France).

Figure 70: Amount of the most recent journey with Uber by reason for travel

	Less than 5 euros	Between 5 and 10 euros	Between 11 and 20 euros	Between 21 and 30 euros	More than 30 euros	I don't remember	Total
Going out (restaurant, cinema, night club, etc.)	228	930	902	264	128	72	2524
To or from a station/airport	63	202	331	248	247	33	1124
A visit to the family, friends	64	218	230	77	45	17	651
A professional trip	19	79	170	86	87	24	465
Rides from home-work / studies	31	109	125	43	30	8	346
For shopping or purchases	13	36	36	11	5	8	109
To go to medical services	7	33	25	12	5	2	84
Other	13	24	26	12	7	2	84
Total	**438**	**1631**	**1845**	**753**	**554**	**166**	**5387**

p = **<0.01** ; Khi2 = **528.46** ; dof = **35** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 5,387 French respondents from among the sub-sample of 6,046 respondents having made their last journey with an Uber service in one of the urban areas studied

The cost of travel also strongly correlates with the service used. According to the declarations of the respondents, 60% of the journeys made with a peer-to-peer transportation service cost less than €10 euros, compared with 38% of all journeys and 15% of journeys made with a licensed driver. Thus, the average reported fare for a journey with a peer-to-peer driver is €11.50, while a journey made with a licensed driver costs on average 40% more, i.e. €19.70. As a reminder, the average reported fare for travel with Uber, all services combined, is €15.10.

Users have a tendency to slightly under-estimate the[23] amount of their travel: thus the average fare registered by the Uber application for a journey with a peer-to-peer driver is €12.30 (compared with an average declared fare of €11.50), €20.50 for a journey with a licensed driver

[23] The gap between the data reported by the respondents and the data recorded by the Uber application can also be explained by the calculation of an average that was declared on the basis of intervals of duration, distance and cost selected by the respondents for their last journey (see questionnaire in Annex 1).

(compared with €19.70) and €17.70 in general (compared with €15.10)[24]. Nevertheless, as with the durations and distances, the orders of magnitude are respected, indicating users who have a fairly accurate idea of the service rendered.

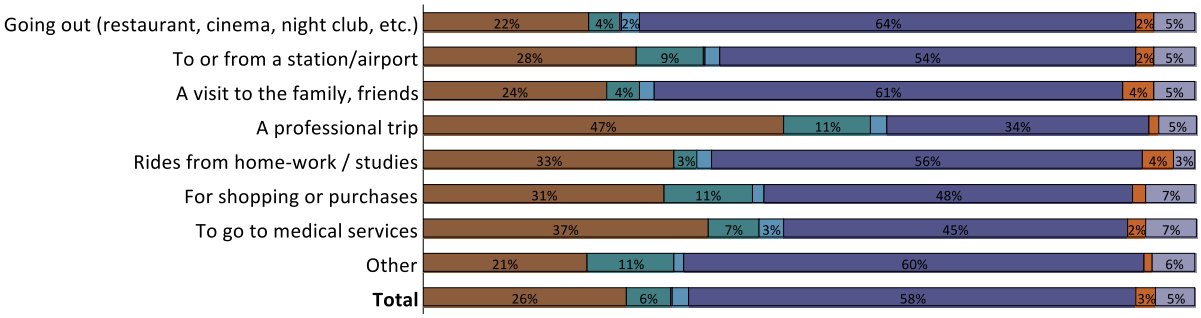
The relatively low number of journeys made in Switzerland does not allow the precise intersection of the reasons for travel and the amounts paid. Note only that journeys for a moderate fare (CHF11 to 20) are overrepresented among recreational outings, while journeys for a fare over CHF30 are overrepresented among the journeys linking railway stations and airports.

Finally, if we intersect the reason for the last journey with the Uber option used, we note that 66% of travel for recreational activities is made with peer-to-peer transportation services (uberPOP or uberPOOL) and 65% of travel for visits, while 60% of business travel is made with licensed transportation services.

Figure 71: Uber option used for the most recent journey with Uber by reason for travel

	... the UberX option	... the UberBERLINE option	... the Uber VAN option	... the UberBLACK option	... the Uber POP option	... the Uber POOL option	I don't remember	Total
Going out (restaurant, cinema, night club, etc.)	616	117	3	69	1836	69	152	2862
To or from a station/airport	349	108	2	24	677	30	68	1258
A visit to the family, friends	170	30	1	13	433	29	39	715
A professional trip	235	56	0	10	171	6	24	502
Rides from home-work / studies	132	12	0	8	226	16	12	406
For shopping or purchases	38	14	0	2	58	2	8	122
To go to medical services	34	6	0	3	41	2	6	92
Other	19	10	0	1	53	1	5	89
Total	**1593**	**353**	**6**	**130**	**3495**	**155**	**314**	**6046**

p = **<0.01** ; Khi2 = **298.23** ; dof = **42** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 6,046 respondents having made their most recent journey with an Uber service in one of the urban areas studied

[24] Source: Uber on 10 July 2015.

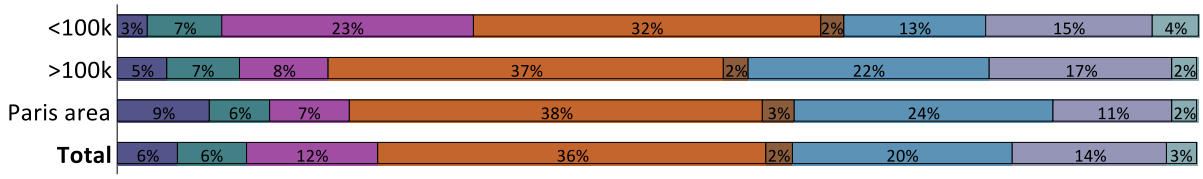
Less expensive journeys and more journeys at night than taxis

The main reason for journeys made with private hire services is for recreational purposes (47%). **This is followed by journeys linking stations or airports** (21%). **In contrast, the main reason for taxi travel[25] concerns access to a railway station or airport** (36%), **followed by travel for recreational activities** (20%). Business travel and access to medical services represent 14% and 12% of taxi travel, respectively, while they concern only 8% and 2% of journeys with private hire services. This difference between taxis and private hire services is certainly related to the fact that medical transportation is free of charge for the patient when it is prescribed by a doctor and if the carrier is government approved. These journeys constitute the bulk of sales for approved taxis in rural communities[26]

Figure 72: Reasons for the most recent taxi journey by type of urban area

	Rides from home-work / studies	A visit to the family, friends	To go to medical services	To or from a station/ airport	For shopping or purch ases	Going out (resta urant, cinema, night club, etc.)	A profes sional trip	Other	Total
<100k	8	20	67	92	6	38	44	12	287
>100k	16	23	28	125	8	76	58	8	342
Paris area	32	21	27	142	11	89	41	9	372
Total	**56**	**64**	**122**	**359**	**25**	**203**	**143**	**29**	**1001**

p = **<0.01** ; Khi2 = **71.71** ; dof = **14** (**VS**)



Source: 6t-bureau de recherche, 2015, online survey of 1,001 taxi users in France

Half of taxi travel took place during the day on weekdays. Only 11% of the journeys took place at night during the weekend, whereas these hours represent 24% of the journeys made with private hire services. However, they are less numerous than the journeys made during the day on weekdays (27%).

Private hire services are mainly used during the night (midnight - 8 a.m.): 37% of all journeys

[25] Respondents to the survey on the usage of taxis in France also had to describe the characteristics of their most recent taxi journey (6t-research office, 2015).

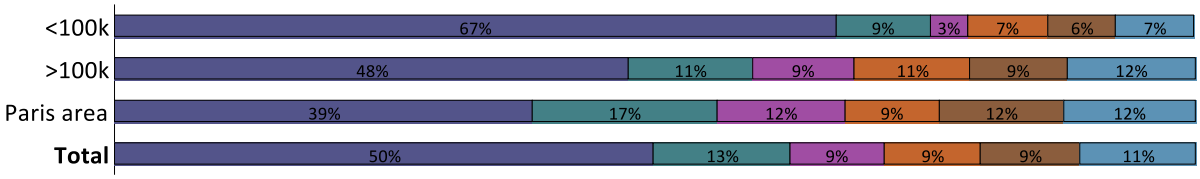
[26] Darbéra, R., 2014, *Les taxis piégés par 36 000 communes*, p. 3.

made with these services take place at night, mainly during the weekend but also during the week. These journeys are mainly provided by peer-to-peer transportation services, with 47% taking place after midnight, compared with 26% with licensed drivers. **The night market represents only 20% of the journeys made by taxi.**

Figure 73: Times of the most recent journey by taxi

	During the week, between 8 a.m. and 8 p.m.	During the week, between 8 p.m. and midnight	During the week, between midnight and 8 a.m.	The weekend, between 8 a.m. and 8 p.m.	The weekend, between 8 p.m. and midnight	The weekend, between midnight and 8 a.m.	Total
<100k	192	25	10	21	18	21	287
>100k	163	39	32	37	31	40	342
Paris area	144	64	44	32	43	45	372
Total	**499**	**128**	**86**	**90**	**92**	**106**	**1001**

p = **<0.01** ; Khi2 = **60.98** ; dof = **10** (**VS**)



Source: 6t-bureau de recherche, 2015, online survey of 1,001 taxi users in France

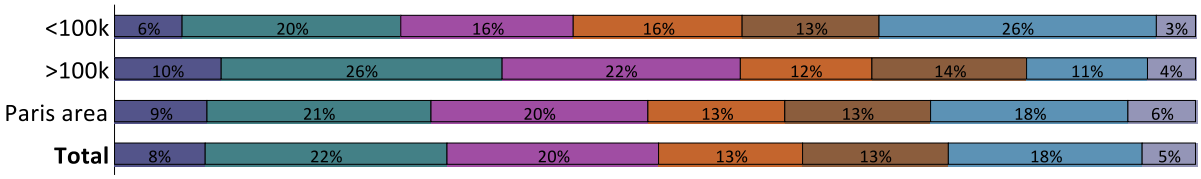
The declared duration of a taxi journey is very close than that declared for a journey with Uber (22 minutes compared to 20 minutes).

50% of taxi journeys are for less than 10 kilometers, while this is the case of 72% of all Uber journeys. Similarly, the proportion of short-distance travel (less than 3 kilometers) is higher among the journeys made with Uber (12%) than for those by taxi (8%). **This raises the issue of "small journeys" by taxi and their coverage.**

Figure 74 Distances travelled during the most recent taxi journey by type of urban area

	Less than 3 kilometres	From 3 to 6 kilometres	From 7 to 10 kilometres	From 10 to 15 kilometres	From 15 to 20 kilometres	More than 20 kilometres	I don't know	Total
<100k	18	58	46	45	36	74	10	287
>100k	34	89	75	42	49	38	15	342
Paris area	32	77	75	47	50	68	23	372
Total	84	224	196	134	135	180	48	1001

p = **0.001** ; Khi2 = **31.84** ; dof = **12** (**VS**)



Source: 6t-bureau de recherche, 2015, online survey of 1,001 taxi users in France

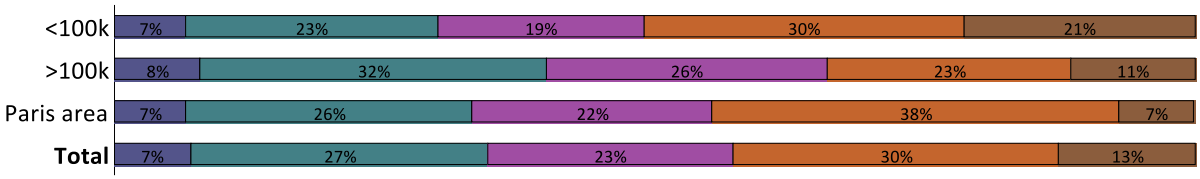
The fares for taxi journeys are higher than for Uber (on average €22.50 compared with €17.70). However, this difference is explained mainly by the fares for journeys with peer-to-peer drivers, which push down the average fares for travel with Uber. In fact, a journey with a peer-to-peer driver costs on average €12.30, while a journey made with a licensed driver costs on average 40% more, i.e. €20.50. A journey with a licensed driver is 40% more expensive than one with a peer-to-peer driver, but is only 10% less expensive than by taxi.

Only 7% of taxi journeys cost less than €10, while this represents 38% of the journeys made with Uber and 60% of the journeys made with a peer-to-peer transportation service (compared with 15% with licensed drivers).

Figure 75: Fare for the most recent journey by taxi

	Between 5 and 10 euros	Between 11 and 20 euros	Between 21 and 30 euros	More than 30 euros	I don't remember	Total
<100k	19	67	55	85	61	287
>100k	27	110	89	77	39	342
Paris area	25	98	83	140	26	372
Total	71	275	227	302	126	1001

p = **<0.01** ; Khi2 = **48.75** ; dof = **8** (**VS**)



Source: 6t-bureau de recherche, 2015, online survey of 1,001 taxi users in France

Analysis of journeys by trip chain

Users who made their most recent journey with Uber in the urban area where they reside had to answer questions aimed at understanding the way in which travel with Uber fits into their trip chain.

Travel with Uber is strongly linked to the user's place of residence: only 8% of journeys do not have the user's home as a pick-up or drop-off point, while journeys that are not related to the user's home are a little more frequent among taxi users and represent 12% of the journeys.

The proportion of journeys with Uber which have the home as the pick-up point is equivalent to that of the journeys which have the home for the drop-off point: each of the two cases represent 46% of the journeys.

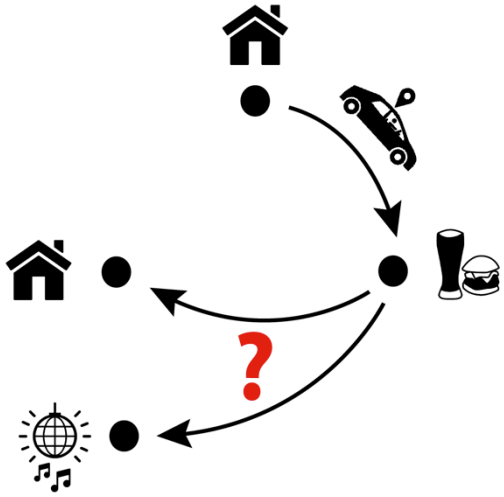
Figure 76: Intersection of the pick-up and drop-off point with the user's home during the most recent journey with Uber

	Nbr	IC
Home as pick-up point	**2337**	**45% < f < 47%**
Home as drop-off point	**2344**	**45% < f < 47%**
Not related to home	**424**	**8% < f < 9%**
Total	**5105**	

Source: 6t-bureau de recherche, 2015, sub-sample of 5,105 respondents having made their last journey with an Uber service in the urban area where they reside

We asked users who had booked an Uber vehicle at their home to indicate the mode they had used to leave the place where the vehicle had dropped them off. Next to the question there was an example consisting of a descriptive text and an illustration. The text was the following: "E*xample: the driver took you from your home to the restaurant. After the restaurant, you decided to go out to a night club or go home. What means did you use then?* ". The illustration is reproduced below.

Figure 77: Image used in the questionnaire concerning the trip chain - the pick-up point is the user's home



Design: 6t-bureau de recherche, 2015

30% of the respondents to this question indicated that they walked and 29% said that they had used an Uber service again to get to their "next destination", that is to say that the most recent "journey" that they described was a chain of several successive trips with Uber. However, the result concerning walking must be considered with caution because it is possible that it may be linked to the understanding of the question by the respondents. In spite of the example and contrary to what was requested, it is possible that a portion of the respondents entered the means that they used to get from the door of the vehicle to the place where they were going.

Figure 78: Means of transport used to travel from the drop-off point to the next destination during the most recent journey with Uber

What means of transport did you use to get from your drop-off point to your next destination?

	Nbr	IC	
On foot	**712**	**29% < f < 32%**	30%
The same ride-sourcing solution	**682**	**28% < f < 31%**	29%
Public transportation (metro, tram, bus, RER, Transilien)	**276**	**11% < f < 13%**	12%
A plane	**214**	**8% < f < 10%**	9%
The train (TER, Intercités, TGV)	**134**	**5% < f < 6%**	6%
A personal car	**117**	**4% < f < 6%**	5%
Other	**62**	**2% < f < 3%**	3%
A taxi	**55**	**2% < f < 3%**	2%
A different ride-sourcing solution	**34**	**1% < f < 2%**	1%
A bicycle (personal or self service)	**25**	**0.8% < f < 1%**	1%
A motorcycle, a scooter	**21**	**0.6% < f < 1%**	0.9%
A self-service car (Autolib)	**5**	**<1% < f < 0.4%**	0.2%
Total	**2337**		

Source: 6t-bureau de recherche, 2015, sub-sample of 2,337 respondents having made their last journey with an Uber service from their home

A good indicator of this bias is provided by the 15% of respondents who indicated they used an Uber service from their home to go to a train station or an airport and then reached their next destination on foot. Therefore, if we estimate that the score for walking is overestimated by 15%, the latter is nevertheless one of the most used modes (15% of the responses), but is of the same order as public transport (12%) and is less than with Uber services (29% of the responses). If in absolute terms the score for walking is to be considered with caution, it remains relevant to analyze its relative score depending on the reason for the trip.

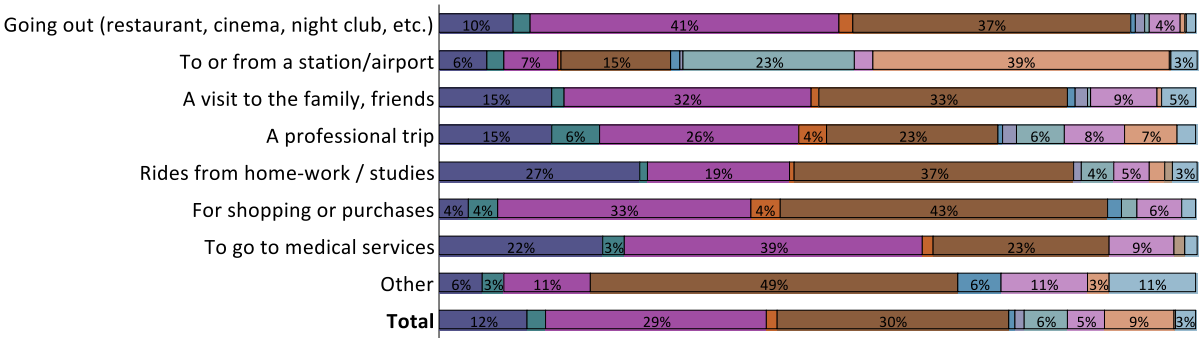
The table below presents the distribution of modes used to reach their following destination by the users who booked an Uber service from their home, depending on their reason for the trip made with Uber. **Users who took Uber to travel from their homes to a place of entertainment have a strong tendency to use either another Uber vehicle** (41% of the responses compared with 29% for the entire sample), **or to continue on foot** (37% compared with 30%). This indicates that there are two scenarios for these respondents travelling to a place of entertainment: either they are travelling to an urban center within which they can then circulate on foot from one place to another, or they need a vehicle to go from one place of entertainment to another and in this case have a tendency to use Uber several times in succession. Logically, users who go from their home to a train station or airport very often take a train or a plane to go to their next destination (23% compared with 6%; 39% compared with 9%).

Users who booked an Uber service from their home to visit family or friends are more likely than the rest of the sample to make their next journey with a private car (9% compared with 5%): it is likely that once they have reached their relatives, these users car-share with them. **Another notable difference with the rest of the sample: there are more users who, following a home-to-work journey with Uber, use public transport** (27% compared with 12%) **or continue on foot** (37% compared with 30%): **This confirms that Uber remains a back-up solution for travel to work.** With regards to the other reasons for travel, the numbers are not sufficient to enable a reliable analysis of the results.

Figure 79: Means of transport used to travel from the drop-off point to the next destination during the most recent journey with Uber by reason for travel

	Going out (restaurant, cinema, night club, etc.)	To or from a station /airport	A visit to the family, friends	A professional trip	Rides from home-work / studies	For shopping or purchases	To go to medical services	Other	**Total**
Public transportation (metro, tram, bus, RER, Transilien)	10%	6%	15%	15%	27%	4%	22%	6%	12%
A taxi	2%	2%	2%	6%	1%	4%	3%	3%	2%
The same ride-sourcing solution	41%	7%	32%	26%	19%	33%	39%	11%	29%
A different ride-sourcing solution	2%	0.4%	1%	4%	0.5%	4%	1%	0%	1%
On foot	37%	15%	33%	23%	37%	43%	23%	49%	30%
A motorcycle, a scooter	0.8%	1%	0.9%	0.6%	0%	2%	0%	6%	0.9%
A bicycle (personal or self service)	1%	0.4%	2%	2%	1%	0%	0%	0%	1%
The train (TER, Intercités, TGV)	0.5%	23%	0.3%	6%	4%	2%	0%	0%	6%
A personal car	4%	2%	9%	8%	5%	6%	9%	11%	5%
A plane	0.7%	39%	0.6%	7%	2%	0%	0%	3%	9%
A self-service car (Autolib)	<1%	0.2%	0%	0%	1%	0%	1%	0%	0.2%
Other	1%	3%	5%	3%	3%	2%	1%	11%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	

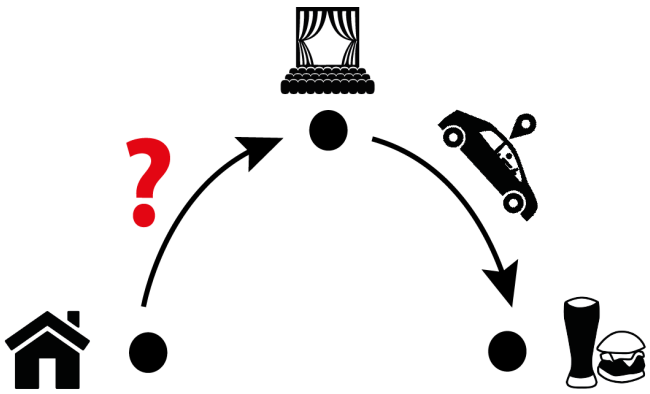
p = **<0.01** ; Khi2 = **1301.64** ; dof = **77** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 2,337 respondents having made their last journey with an Uber service from their home

We asked users who did not leave their home with an Uber service which mode they had used to get to their Uber pick-up point. The question was accompanied by a text and an illustration. The text was the following: *"Example: the driver took you from the cinema to the restaurant. How did you get from your home to the cinema?* ". The illustration is reproduced below.

Figure 80: Image used in the questionnaire concerning the trip chain - the pick-up point is not the user's home



Design: 6t-bureau de recherche, 2015

The proportion of users who did not take Uber from their home but who had used it for their next to last journey is marginal (6%). To get to their pick-up point, users predominantly used public transport (47%) or went on foot (20%, with the risk of overvaluation detailed above).

Figure 81: Means of transport used to travel to the pick-up point during the most recent journey with Uber

	Nbr	IC	
Public transportation (metro, tram, bus, RER, Transilien)	**1292**	**45% < f < 48%**	47%
On foot	**554**	**19% < f < 21%**	20%
The train (TER, Intercités, TGV)	**200**	**7% < f < 8%**	7%
A personal car	**187**	**6% < f < 7%**	7%
The same ride-sourcing solution	**163**	**5% < f < 7%**	6%
A plane	**150**	**5% < f < 6%**	5%
Other	**66**	**2% < f < 3%**	2%
A bicycle (personal or self service)	**57**	**2% < f < 2%**	2%
A taxi	**32**	**0.9% < f < 1%**	1%
A motorcycle, a scooter	**30**	**0.8% < f < 1%**	1%
A different ride-sourcing solution	**26**	**0.7% < f < 1%**	0.9%
A self-service car (Autolib)	**11**	**0.2% < f < 0.6%**	0.4%
Total	**2768**		

Source: 6t-bureau de recherche, 2015, sub-sample of 2,768 respondents having made their last journey with an Uber service in the urban area where they reside from a pick-up point other than their homes

Users who took an Uber service for a recreational outing were even more likely than the others to have used public transport during their previous journey (57%, compared with 47% of all replies). This means that the users may have used public transport while they are in service and

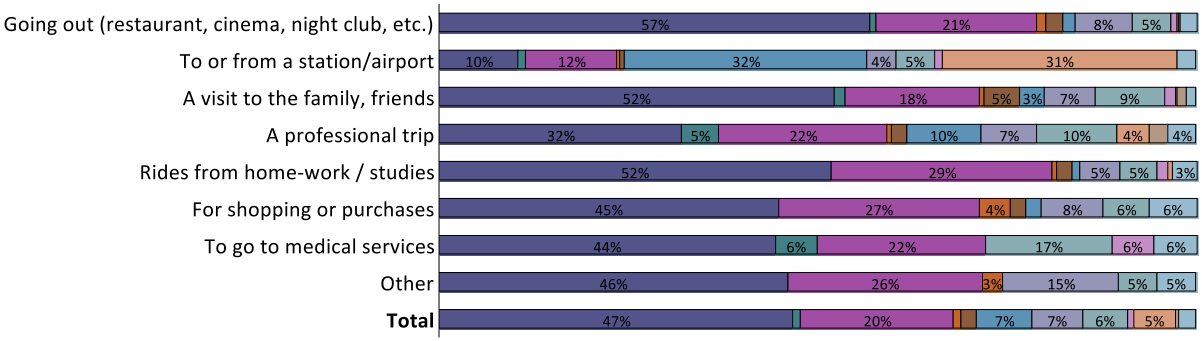
then made use of private hire services to return home. Private hire services thus appear as a solution that is complementary to public transport and an alternative to the use of the private car, which is restricted by considerations of parking and alcohol consumption.

Users who took Uber to connect with a train station or airport logically had a tendency to use a train or plane during their journey (32% compared with 7%; 31% compared with 5%). Another notable trend is that users who used Uber for visits to friends and relatives are also more numerous than the average to have used public transport during the previous journey (52% compared with 47%), but also to have used a bicycle (5% compared with 0.9%) or another Uber vehicle (9% compared with 6%). Users who used Uber for business travel are more likely to have used a shared car during their last journey, whether it be with Uber (10%), a taxi (5% compared with 1%) or a self-service car-sharing solution like "Autolib'" (2% compared with 0.4%).

Figure 82: Means of transport used to travel to the pick-up point during the most recent journey with Uber by reason for travel

	Going out (restaurant, cinema, night club, etc.)	To or from a station /airport	A visit to the family, friends	A professional trip	Rides from home-work / studies	For shopping or purchases	To go to medical services	Other	**Total**
Public transportation (metro, tram, bus, RER, Transilien)	**57%**	**10%**	**52%**	**32%**	52%	45%	44%	46%	47%
A taxi	0.9%	1%	1%	**5%**	0%	0%	6%	0%	1%
On foot	21%	**12%**	18%	22%	**29%**	27%	22%	26%	20%
A motorcycle, a scooter	1%	0.2%	0.7%	0.6%	0.5%	**4%**	0%	3%	1%
A bicycle (personal or self service)	2%	**0.7%**	**5%**	2%	2%	2%	0%	0%	2%
The train (TER, Intercités, TGV)	**2%**	**32%**	**3%**	10%	**1%**	2%	0%	0%	7%
A personal car	8%	**4%**	7%	7%	5%	8%	0%	**15%**	7%
The same ride-sourcing solution	**5%**	5%	**9%**	**10%**	5%	6%	17%	5%	6%
A different ride-sourcing solution	0.8%	1%	1%	0%	2%	0%	**6%**	0%	0.9%
A plane	**0.1%**	**31%**	**0.4%**	4%	**0.5%**	0%	0%	0%	5%
A self-service car (Autolib)	0.3%	0%	1%	**2%**	0%	0%	0%	0%	0.4%
Other	2%	2%	1%	4%	3%	6%	6%	5%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	

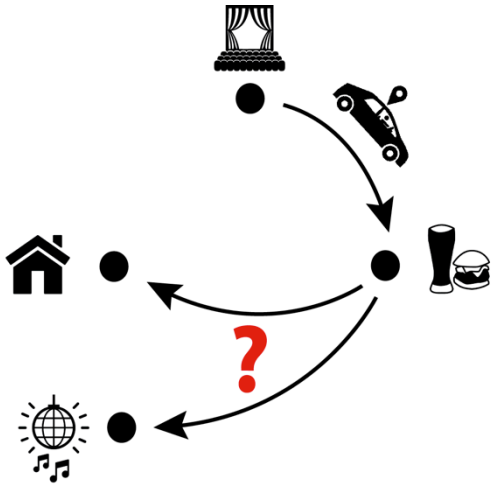
p = **<0.01** ; Khi2 = **1444.62** ; dof = **77** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 2,768 respondents having made their last journey with an Uber service in the urban area where they reside from a pick-up point other than their homes

Among these 2,768 users who did not use Uber to leave their homes, 2,344 used Uber to return to their homes. This leaves 424 users for which the pick-up and drop-off points were not the home. They were asked to indicate what means they had used to get to their next destination after having used Uber. The question was accompanied by a text and an illustration as an example. The text was the following: *"Example: the driver took you from the cinema to the restaurant. After the restaurant, you decided to go out to a night club or go home. What means did you use then? "*. The illustration is reproduced below.

Figure 83: Image used in the questionnaire concerning the trip chain for travel not involving the user's home



Design: 6t-bureau de recherche, 2015

Users whose Uber journey did not involve the home mostly used public transport (27% of the replies) and walked (27%, with the risk of overestimation explained above). In comparison to users who left their homes with Uber, they have little tendency to follow up their journeys with Uber (10% compared with 29%).

Two profiles thus appear: on the one hand, a third of the users who start their journeys with Uber from their homes and have a tendency to complete their journeys with Uber; on the other hand, users who did not leave their homes with Uber and who use Uber occasionally, either to return home, or in the middle of a complex trip chain including other modes, in particular public transport and walking. The numbers of users for whom the most recent journey with Uber is not linked to the home is not high enough to enable a detailed analysis depending on reasons for travel.

Figure 84: Means of transport used during the most recent journey with Uber to travel from the drop-off point to the next destination

	Nbr	IC	
On foot	115	24% < f < 30%	27%
Public transportation (metro, tram, bus, RER, Transilien)	114	24% < f < 30%	27%
A personal car	77	15% < f < 21%	18%
The same ride-sourcing solution	43	8% < f < 12%	10%
The train (TER, Intercités, TGV)	28	5% < f < 8%	7%
Other	9	1% < f < 3%	2%
A bicycle (personal or self service)	9	1% < f < 3%	2%
A plane	8	0.9% < f < 3%	2%
A motorcycle, a scooter	6	0.6% < f < 2%	1%
A taxi	6	0.6% < f < 2%	1%
A different ride-sourcing solution	5	0.4% < f < 2%	1%
A self-service car (Autolib)	4	0.3% < f < 2%	0.9%
Total	**424**		

Source: 6t-bureau de recherche, 2015, sub-sample of 424 respondents having made their last journey with an Uber service in the urban area where they reside which do not include their home as a pick-up or drop-off point

Analysis of the reasons for travel by service used and urban area

This is to determine the extent to which Uber users make different journeys depending on whether they use peer-to-peer transportation services (uberPOP and uberPOOL) or licensed transportation services (the other Uber options). Given that only 6 journeys with VAN were reported, they will not be analyzed. In addition, a number of respondents were not able to indicate the option used during their most recent Uber journey. This explains the slightly smaller number of journeys analyzed in this section in relation to the previous one (5,726 compared with 6,046).

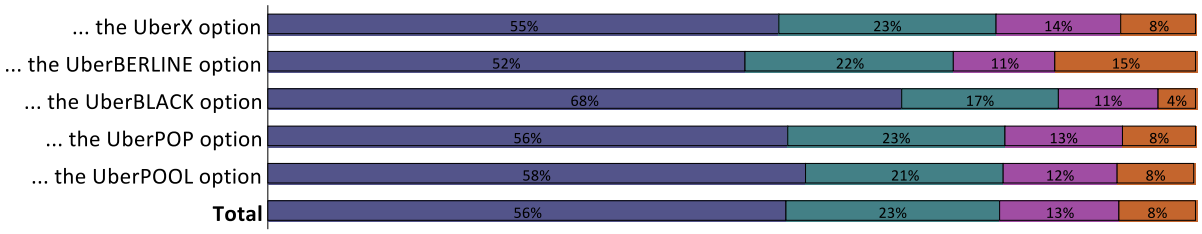
Peer-to-peer transportation services are especially used for recreational outings.

In contrast, licensed transportation services are less used for reasons of recreation. **It is not surprising that the proportion of business travel is overrepresented among the journeys made with licensed transportation services**, **This proportion of business travel for licensed transportation services is similar to that measured for taxis** (14%). UberBERLINE distinguishes itself by a high share of travel connecting airports and train stations (31% compared with 21% of all journeys).

Figure 85: Option used for the most recent journey with Uber by reason for travel

	Core city-->Core city	Core city-->Periphery	Peripher y-->Core city	Periphery-->Periphery	Total
... the UberX option	**880**	**371**	**216**	**126**	**1593**
... the UberBERLINE option	**182**	**79**	**39**	**53**	**353**
... the UberBLACK option	**89**	**22**	**14**	**5**	**130**
... the UberPOP option	**1963**	**816**	**445**	**271**	**3495**
... the UberPOOL option	**90**	**33**	**19**	**13**	**155**
Total	**3204**	**1321**	**733**	**468**	**5726**

p = **<0.01** ; Khi2 = **33.83** ; dof = **12** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 5,726 respondents having made their last journey with an Uber service in one of the urban areas studied and having specified the Uber service used.

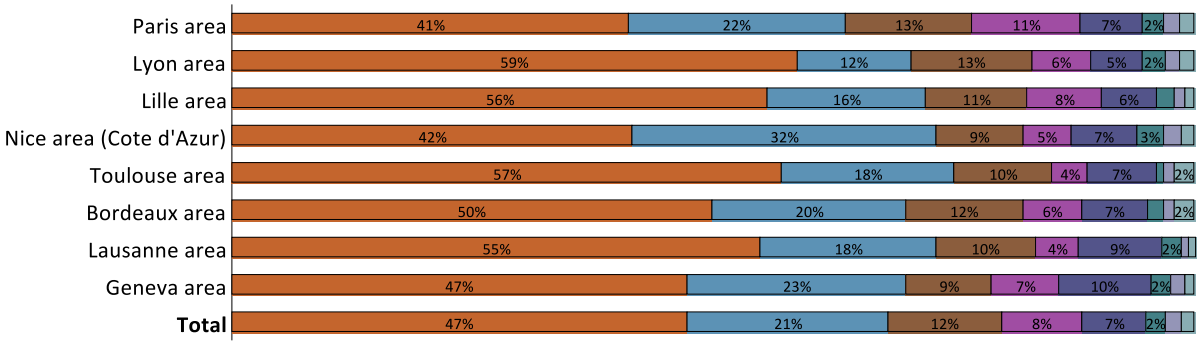
We seek to determine the extent to which the reasons for travel vary according to the urban area where they take place.

Recreational outings account for a particularly large proportion of travel in the Lyon, Lille and Toulouse areas (59, 56 and 57% of all journeys made in each of these urban areas, respectively, compared with 47% of all journeys analyzed). **The Nice-Côte d'Azur area distinguishes itself by a high share of travel connecting airports and train stations** (32% compared with 21% of all journeys analyzed).

Figure 86: Urban area where the most recent journey with Uber took place by reason for travel

	Going out (restaurant, cinema, night club, etc.)	To or from a station /airport	A visit to the family, friends	A professional trip	Rides from home-work / studies	For shopping or purchases	To go to medical services	Other	**Total**
Paris area	1153	627	367	315	184	58	50	42	**2796**
Lyon area	357	71	77	36	33	14	9	10	**607**
Lille area	316	93	60	44	32	11	6	6	**568**
Nice area (Cote d'Azur)	212	161	46	26	34	15	9	7	**510**
Toulouse area	272	86	48	18	34	4	5	10	**477**
Bordeaux area	214	86	53	26	29	7	5	9	**429**
Lausanne area	190	63	36	15	30	7	3	2	**346**
Geneva area	148	71	28	22	30	6	5	3	**313**
Total	**2862**	**1258**	**715**	**502**	**406**	**122**	**92**	**89**	**6046**

p = **<0.01** ; Khi2 = **229.02** ; dof = **49** (**VS**)



Source: 6t-bureau de recherche, 2015, sub-sample of 5,726 respondents having made their last journey with an Uber service in one of the urban areas studied and having specified the Uber service used.

IN SHORT: THE CHARACTERISTICS OF TRAVEL WITH UBER

Users of private hire services primarily use these services in their area of residence. 44% of their journeys have a pick-up or drop-off point in the periphery of the urban area, reflecting the complementarity of these services when the public transport offer is limited.

The average duration of a journey with Uber is 20 minutes, for an average distance of 8 kilometers, an average fare of €17.70 and an occupancy rate of 1.8 passengers.

Nevertheless, 44% of the journeys made with private hire services last less than 15 minutes. These short journeys take place mainly at night during the weekend and for recreational outings. They are more frequent within the core city. 66% of these journeys are made with peer-to-peer transportation services.

After recreational outings (47% of the journeys), travel to a train station or airport is the second more frequent purpose of these journeys. They are more frequent during the daytime on weekdays, linking the core city to the periphery, taking more than 15 minutes. These journeys are more expensive (44% of these journeys cost more than €20) and are in greater competition with taxis (this market represents 40% of their journeys).

Travel with Uber is strongly linked to the user's home: only 8% of the journeys do not involve the user's home as a pick-up or drop-off point. The proportion of journeys which have the home as the pick-up point (46%) is equivalent to that of the journeys which have the home for the drop-off point. Users of Uber services have a multimodal approach: 47% of them went to the pick-up point by public transport and 20% went on foot. These services are integrated into their complex trip chain.

2. Understanding the choice of mode

2.1 THE FACTORS OF THE CHOICE OF MODE

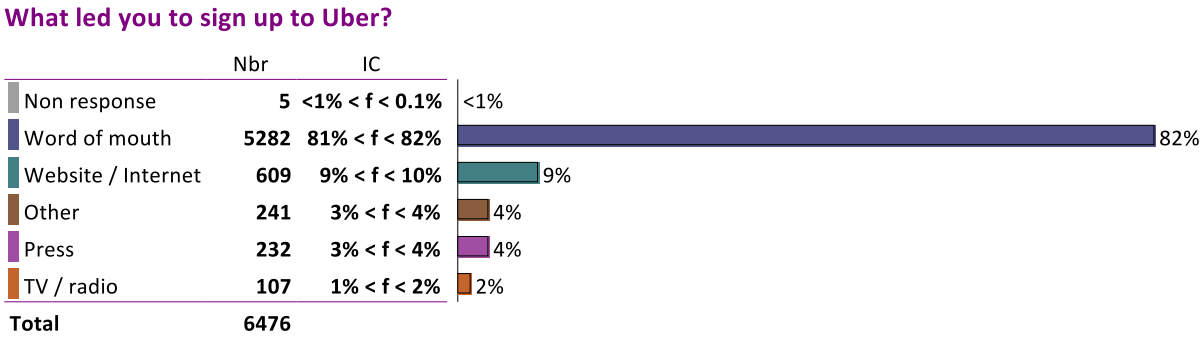
After studying the sociodemographic profile of the users of private hire services and the characteristics of the travel made with these services, in this second part we try to understand the choice of mode: how did the respondents come to use these services and why do they use them? We look at whether the reasons for use and the motivations are the same depending on the urban area and the types of service used. We conclude with the users' modal profiles.

The motivations of the users of private hire services

Information about private hire services is distributed mainly through word-of-mouth

Users say they signed up to the Uber application due to the influence of word-of-mouth (82% of the replies). Nine percent of users say it was the internet that led them to sign up. Traditional media (press, TV and radio) played only a marginal role (6% of the replies). In this, Uber largely diverges from other car-sharing services, for which the press and the internet play a predominant role: for example, 49% of Autolib' users discovered it by the press; 71% of the users of peer-to-peer car rental services (as rentees) also discovered them through the internet. In contrast, only 40% of Autolib' users and 13% of the users of peer-to-peer rental heard about it by word-of-mouth. Word-of-mouth seems therefore play a particularly important role for the dissemination of information about Uber.

Figure 87: Distribution of Uber users according to the main motivation for signing up to the Uber application



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

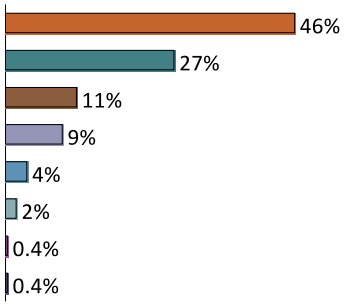
Users' main motivations: to benefit from more practical services and, for the users of peer-to-peer transportation services, rates that are cheaper than taxis

The main motivations of Uber users when they began to use private hire services were that they are cheaper than taxis (46% of the replies) and their "practical" aspect in comparison with taxis (27%). The "novelty effect" linked to the appearance of new services has also played a non-negligible role (11% of replies). **The motivations expressed by comparison with public transport and private cars are less important (10% and 2% of replies, respectively).**

Figure 88: Distribution of Uber users according to their main motivation at the time of signing up to the service

What was your main reason for beginning to use these solutions? (only one answer possible)

	Nbr	IC
It was less expensive than a taxi	**2994**	**45% < f < 47%**
It was more practical than a taxi	**1747**	**26% < f < 28%**
It was a new form of transportation that I wanted to try out	**735**	**11% < f < 12%**
It was more practical than public transportation	**589**	**9% < f < 10%**
It was more practical than taking my own car	**236**	**3% < f < 4%**
Other	**124**	**2% < f < 2%**
It was less expensive than public transportation	**28**	**0.3% < f < 0.5%**
It was less expensive than taking my own car	**23**	**0.2% < f < 0.5%**
Total	**6476**	



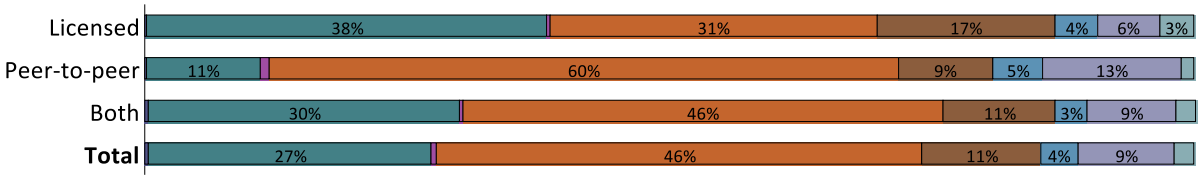
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

The motivation due to lower cost in comparison with taxis is pronounced among the users of peer-to-peer transportation services: 60% of the users of peer-to-peer transportation services signed up to the Uber application because it was cheaper than taxis compared with 31% of users of licensed transportation services. In contrast, 38% of the users of licensed transportation services signed up to the Uber application because it was more practical than taxis, compared with 11% of the users of peer-to-peer transportation services.

Figure 89: Distribution of Uber users according to the main motivation at the time of signing up to the service, by service used

	It was less expensive than taking my own car	It was more practical than a taxi	It was less expensive than public transportation	It was less expensive than a taxi	It was a new form of transportation that I wanted to try out	It was more practical than taking my own car	It was more practical than public transportation	Other	Total
Licensed	2	449	3	366	198	49	69	39	1175
Peer-to-peer	4	157	10	865	129	69	190	18	1442
Both	17	1141	15	1763	408	118	330	67	3859
Total	**23**	**1747**	**28**	**2994**	**735**	**236**	**589**	**124**	**6476**

p = **0.00** ; Khi2 = **433.08** ; dof = **14** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Nevertheless, **58% of respondents feel that their current motivation for using private hire services is no longer the same as when they began using them.**

Figure 90: Proportion of Uber users whose main motivation for using private hire services has evolved since signing up to these services

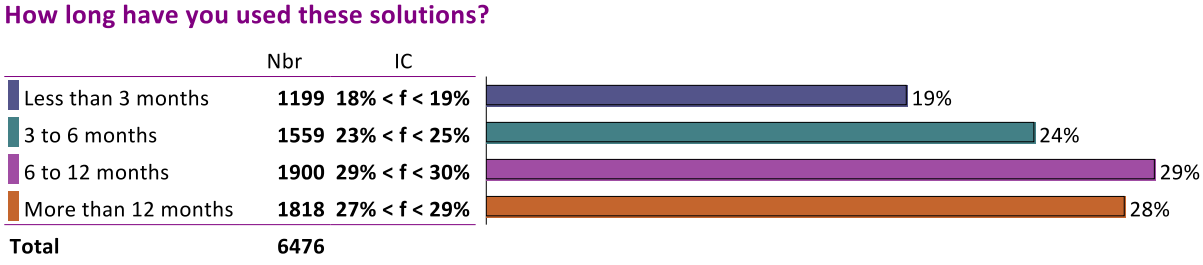
Would you say that your main motivation for using these solutions has changed?

	Nbr	IC
Yes	**3761**	**57% < f < 59%**
No	**2715**	**41% < f < 43%**
Total	**6476**	

Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Indeed, the majority of users who responded to the questionnaire have used private hire services for more than 6 months (57% of them): their experience and their assessment of these services are therefore likely to have changed since they began to use them.

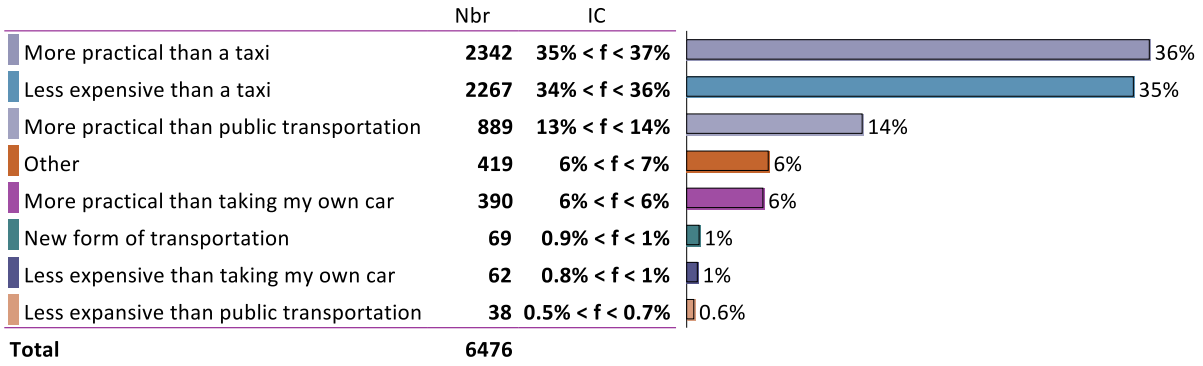
Figure 91: Distribution of Uber users according to the time elapsed since they began to use private hire services



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

At present, users no longer place as much importance on this "inexpensive" aspect as they did when they began to use these services (35% compared with 46%). **They highlight the "practical" aspect** in comparison to taxis (36% compared with 27%) and public transport (14% compared with 9%). If users initially turn to private hire services for reasons of cost, they nonetheless have a strong tendency to come back to them for practical reasons.

Figure 92: Distribution of Uber users according to their main motivation for using private hire services at the time of the survey



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Services considered as more practical than taxis thanks to smartphone applications and automatic payment

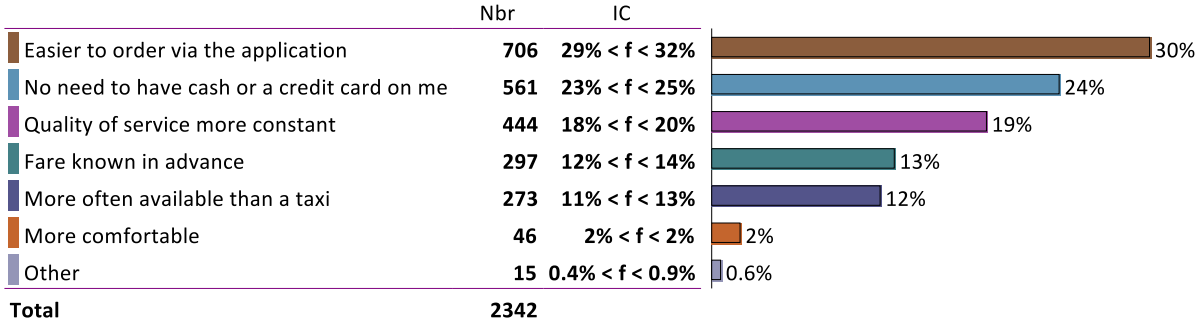
We asked users who find these services to be more practical than taxis to elaborate on their response. Thirty percent of them indicate that these services are above all practical thanks to their smartphone applications; 24% because automatic payment by direct debit frees them from the need to remember to carry a means of payment with them. **The advantage of these services over taxis in terms of practicality therefore depends above all on the technical means involved**. Only 12% of the respondents declare the shortage of taxis as the main reason to explain they

find these services more practical. Thus, in the long term, private hire services seduce their users above all by the very nature of their service.

19% of the respondents find that private hire services are more practical than taxis above all because the quality of these services is in their opinion more constant. **The constancy of the quality of service seems to be an argument that is even stronger than the level of comfort** (only 2% of the replies): thus, users seek a standard of quality rather than status.

Figure 93: Classification of reasons why private hire services are considered more practical than taxis

What is the main reason why you find these solutions more practical than a taxi? (only one answer possible)



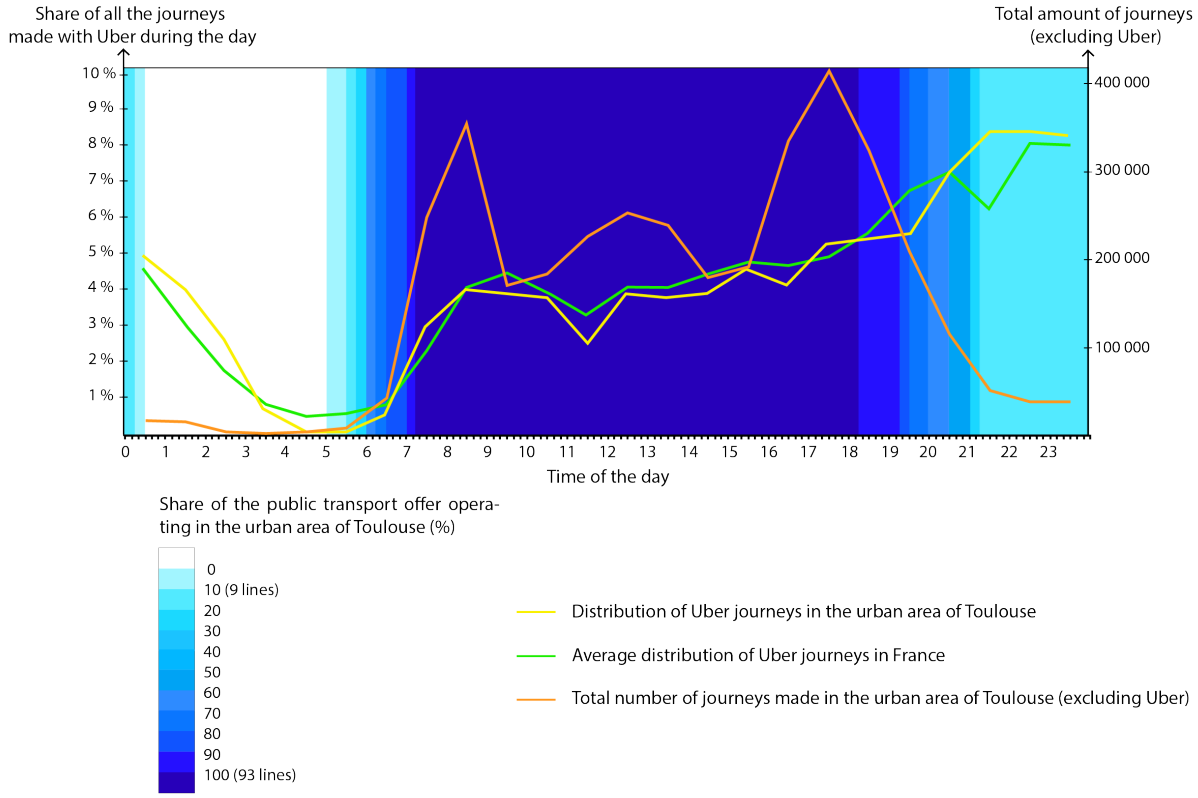
Source: 6t-bureau de recherche, 2015, sample of 2,342 respondents who had already used Uber and whose main motivation for using private hire services is that they consider them more practical than taxis.

We also invited the users who stated that private hire services were above all more practical than public transport to clarify their responses. For 46% of them, these services are above all more practical because they are available when public transport is unavailable or not frequent enough. This appears to be consistent with the main time slots for the use of these services, namely at night (37% of journeys made with Uber, see section 1.2).

The graph below, for which the methodology of construction is explained in annex 2, illustrates the use of private hire services by residents when public transport is no longer available (white background).

The case of the Toulouse urban area is given as an example. The same graph was made for several urban areas (Lille, Lyon, Bordeaux and Geneva).

Figure 94: Distribution of Uber journeys during the day in relation to the distribution of all journeys and to the public transport offer of the urban area of Toulouse



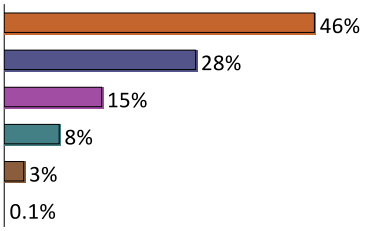
Source: compiled by 6t-bureau de recherche based on Uber and EMD data (25 June 2015)

For 28%, the main advantage of these services is that they are faster than public transport or enable them to avoid journeys with too many connections. **Only a minority state that comfort and security are the main advantages of these services (15% and 8%, respectively).** The reliability of these services compared to public transport is chosen by only 3% of the respondents to the question.

Figure 95: Classification of reasons why private hire services are considered to be more practical than public transport

What is the main reason why you find these solutions more practical than public transportation? (only one answer possible)

	Nbr	IC
Available at any hour of the day and night	407	43% < f < 48%
Faster / more direct than public transportation	253	26% < f < 31%
More comfortable than public transportation	129	13% < f < 16%
Safer than public transportation (robbery, aggression, etc.)	73	7% < f < 10%
More reliable than public transportation (travel time)	26	2% < f < 4%
Other	1	0% < f < 0.3%
Total	**889**	



Source: 6t-research bureau, 2015, sample of 889 respondents having already used Uber and whose main motivation for using private hire services is that they consider them more practical than public transport.

Users who stated that private hire services are above all more practical than private cars were also asked to clarify their responses. For 52% of them, the main advantage of private hire services over private cars is the fact of not having to look for a place to park. Thirty-seven percent choose these services above all because they enable them to avoid driving. Only 5% choose PHVs above all for the comfort they offer compared to their private car.

Figure 96: Classification of reasons why private hire services are considered more practical than taxis

What is the main reason why you find these solutions more practical than your own car? (only one answer possible)

	Nbr	IC
No need to park	204	49% < f < 56%
No need to drive	146	34% < f < 41%
Other	21	4% < f < 7%
More comfortable	19	3% < f < 6%
Total	**390**	

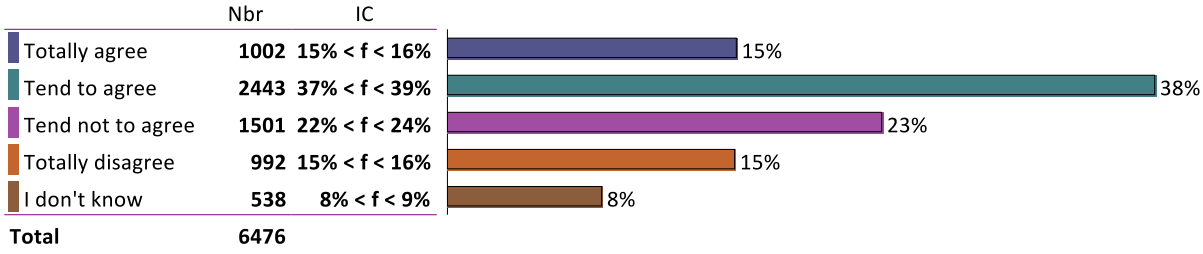
Source: 6t-bureau de recherche, 2015, sample of 390 respondents having already used Uber and whose main motivation for using private hire services is that they consider them more practical than private cars.

Users have a high degree of confidence in private hire services

We asked users a question which aimed at assessing the extent to which they were confident in these services and in the drivers themselves, beyond the simple efficiency of the service. The question was to ask the user whether, if it were possible, they would be confident to let their unaccompanied child travel with a private hire service. It showed that a majority of users (53%) would be willing to let their child use one of these services unaccompanied.

Figure 97: Distribution of Uber users by response to the question aimed at assessing their level of confidence in private hire services

Do you agree with the following statement (even if you do not have children): " *If it was possible, I would be confident to let my unaccompanied child use one of these solutions* "?



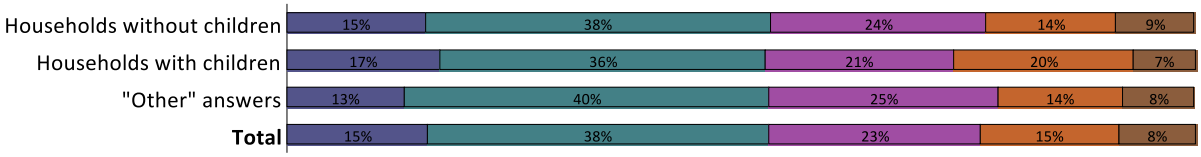
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

The question was asked to all users, including those who live in a household without children. However, the proportion of users who agree with the statement does not vary according to whether they belong to a household with or without children (53% "totally agree" or "somewhat agree" with the statement in both cases).

Figure 98: Responses of Uber users to the question aimed at assessing their level of confidence in private hire services, by household composition

	Totally agree	Tend to agree	Tend not to agree	Totally disagree	I don't know	Total
Households without children	**724**	**1803**	**1120**	**674**	**416**	**4737**
Households with children	**225**	**477**	**278**	**262**	**90**	**1332**
"Other" answers	**53**	**163**	**103**	**56**	**32**	**407**
Total	**1002**	**2443**	**1501**	**992**	**538**	**6476**

p = **<0.01** ; Khi2 = **35.76** ; dof = **8** (**VS**)



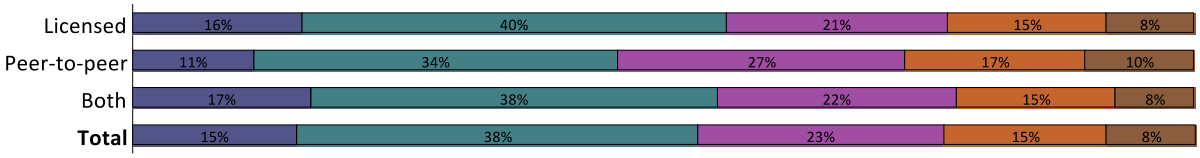
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

The proportion of users who only use peer-to-peer transportation services and who agree with the statement, although remaining relatively high (45%), is lower than that of respondents who use licensed transportation services alone or partially and who declare that they agree with the statement (55 and 56%, respectively).

Figure 99: Responses of Uber users to the question aimed at assessing their level of confidence in private hire services, by type of service used

	Totally agree	Tend to agree	Tend not to agree	Totally disagree	I don't know	Total
Licensed	**189**	**469**	**243**	**176**	**98**	**1175**
Peer-to-peer	**165**	**494**	**391**	**242**	**150**	**1442**
Both	**648**	**1480**	**867**	**574**	**290**	**3859**
Total	**1002**	**2443**	**1501**	**992**	**538**	**6476**

p = **<0.01** ; Khi2 = **53.04** ; dof = **8** (**VS**)



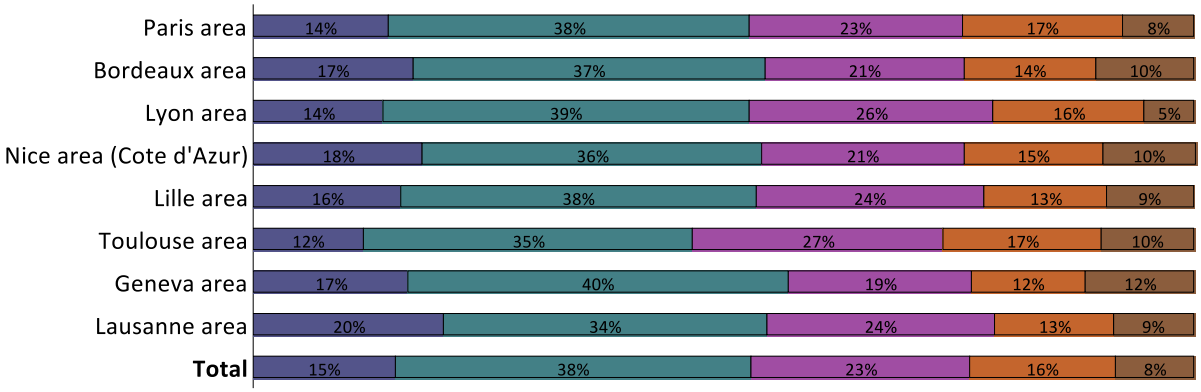
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

In the Paris area, users who say they "do not agree at all" with the statement are slightly overrepresented (17% compared with 16% in the total sample), but 52% of them nevertheless "agree" with this statement. Users who say they "totally agree" are overrepresented in the Lausanne urban area (20% compared with 15% in the total sample).

Figure 100: Responses of Uber users to the question aimed at assessing their level of confidence in private hire services, by urban area of residence

	Totally agree	Tend to agree	Tend not to agree	Totally disagree	I don't know	Total
Paris area	**394**	**1049**	**623**	**465**	**207**	**2738**
Bordeaux area	**76**	**165**	**94**	**62**	**46**	**443**
Lyon area	**89**	**249**	**166**	**103**	**35**	**642**
Nice area (Cote d'Azur)	**86**	**171**	**102**	**70**	**46**	**475**
Lille area	**90**	**216**	**139**	**75**	**53**	**573**
Toulouse area	**60**	**178**	**135**	**86**	**50**	**509**
Geneva area	**63**	**154**	**74**	**46**	**44**	**381**
Lausanne area	**78**	**133**	**93**	**49**	**33**	**386**
Total	**936**	**2315**	**1426**	**956**	**514**	**6147**

p = **<0.01** ; Khi2 = **59.55** ; dof = **28** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber, by urban area of residence.

Private hire services inspire greater confidence than taxis

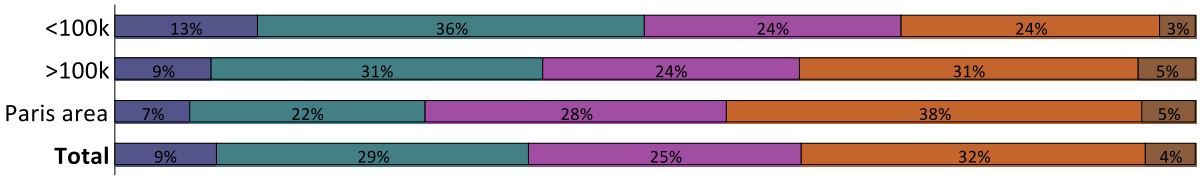
The question asked to users of private hire services to assess their confidence in these services was also asked during the survey of taxi users in France (6t-bureau de recherche, 2015) in order to assess their confidence in taxis. The proportion of taxi users who "agree" with the question is significantly less than that of Uber users (38% compared with 53%). Even the users of peer-to-peer transportation services were more likely to "agree" with the statement than taxi users (45% against 38%).

If the confidence of taxi users residing in urban areas under 100,000 inhabitants seems relatively important (49% "agree" with the statement proposed), this confidence seems much less for taxi users in the Paris area: only 29% say that they "agree" with the statement proposed, while 52% of Uber users residing in this same urban area "agree" with the statement.

Figure 101: Responses of taxi users to the question aimed at assessing their level of confidence in taxis, by type of urban area of residence

	Totally agree	Tend to agree	Tend not to agree	Totally disagree	I don't know	Total
<100k	38	103	68	69	9	287
>100k	31	105	81	107	18	342
Paris area	26	81	104	143	18	372
Total	95	289	253	319	45	1001

p = **<0.01** ; Khi2 = **32.56** ; dof = **8** (**VS**)



Source: 6t-bureau de recherche, 2015, online survey of 1,001 taxi users in France.

Analysis of the factors of the choice of mode by type of service used

This section aims to determine the extent to which factors of the use of private hire services change depending on the types of service used.

Users use licensed transportation services predominantly for the practical aspect and peer-to-peer transportation services predominantly for the cost

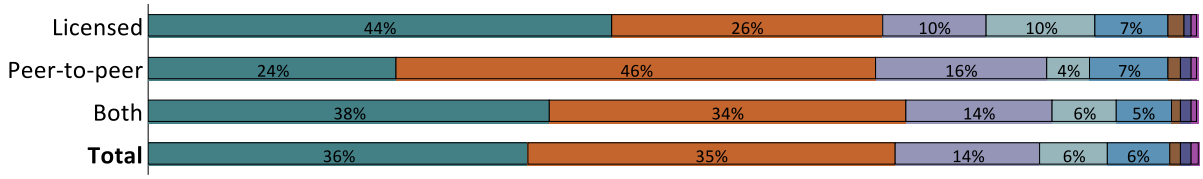
The figure below presents the current motivations of users by type of service used. In relation to the rest of the sample, users who only use peer-to-peer transportation services are strongly inclined to highlight the cost advantage of these services over taxi services (46% of their responses, compared with 35% in the whole sample). As we have shown in the previous section with respect to the types of journey made with these services, journeys for recreational activities and to visit family and friends are frequently made with peer-to-peer transportation services. The cost of the journey is a deciding factor in recreational mobility.

Users who only use licensed transportation services have an attraction for the "practical" aspect of these services that is above the average in comparison to taxis (44% of their responses, compared with 36% in the total sample). One might think that these users use licensed transportation services: in fact, the vast majority of business travel relies on licensed drivers.

Figure 102: Main motivation of Uber users for using private hire services, by service used

	More practical than a taxi	Less expen sive than a taxi	More pratical than public transpo rtation	Other	More practical than taking my own car	New form of transpo rtation	Less expen sive than taking my own car	Less expen sive than public transpo rtation	Total
Licensed	520	303	116	122	82	17	8	7	1175
Peer-to-peer	342	659	235	58	108	17	15	8	1442
Both	1480	1305	538	239	200	35	39	23	3859
Total	**2342**	**2267**	**889**	**419**	**390**	**69**	**62**	**38**	**6476**

p = **0.00** ; Khi2 = **242.09** ; dof = **14** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

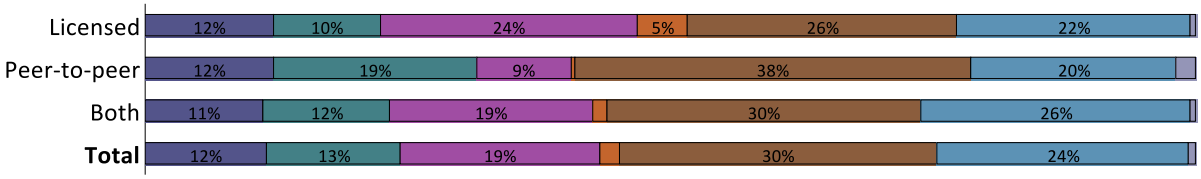
Users of licensed transportation services highlight the quality of the service, the users of peer-to-peer transportation services appreciate the application

When they are invited to clarify their response, users who find private hire services more practical than taxis give slightly different answers depending on the type of service used. Users who only use licensed transportation services place greater importance on consistent quality of service (24% compared with 9% of users with peer-to-peer drivers), while the users of peer-to-peer transportation services have a greater tendency to highlight the fact that they know the fare for the journey in advance (19% compared with 10% of users of licensed transportation services), as well as the fact of being able to book a vehicle via the application (38% compared with 26%).

Figure 103: Classification of the reasons why private hire services are considered more practical than taxis, by service used

	More often available than a taxi	Fare known in advance	Quality of service more constant	More comfor table	Easier to order via the application	No need to have cash or a credit card on me	Other	**Total**
Licensed	**64**	**53**	**127**	**25**	**133**	**116**	**2**	**520**
Peer-to-peer	**42**	**66**	**31**	**1**	**129**	**67**	**6**	**342**
Both	**167**	**178**	**286**	**20**	**444**	**378**	**7**	**1480**
Total	**273**	**297**	**444**	**46**	**706**	**561**	**15**	**2342**

p = **<0.01** ; Khi2 = **93.17** ; dof = **12** (**VS**)



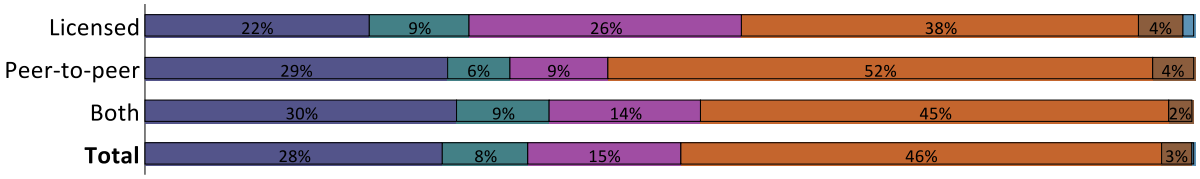
Source: 6t-bureau de recherche, 2015, sample of 2,342 respondents who had already used Uber and whose main motivation for using private hire services is that they consider them more practical than taxis.

Users who find that private hire services are above all more practical than public transport and who only use licensed transportation services are more likely than other users to highlight the comfort of these services (26% compared with 9% of the users of peer-to-peer transportation services), while users of peer-to-peer transportation services emphasize the availability of these services at any time (52% compared with 38% of the users of licensed transportation services).

Figure 104: Classification of the reasons why private hire services are considered to be more practical than public transport, by type of service used

	Faster / more direct than public transpo rtation	Safer than public transpo rtation (robbery, aggression, etc.)	More comfortable than public transpo rtation	Available at any hour of the day and night	More reliable than public transpo rtation (travel time)	Other	**Total**
Licensed	**25**	**11**	**30**	**44**	**5**	**1**	**116**
Peer-to-peer	**68**	**14**	**22**	**122**	**9**	**0**	**235**
Both	**160**	**48**	**77**	**241**	**12**	**0**	**538**
Total	**253**	**73**	**129**	**407**	**26**	**1**	**889**

p = **<0.01** ; Khi2 = **31.47** ; dof = **10** (**VS**)



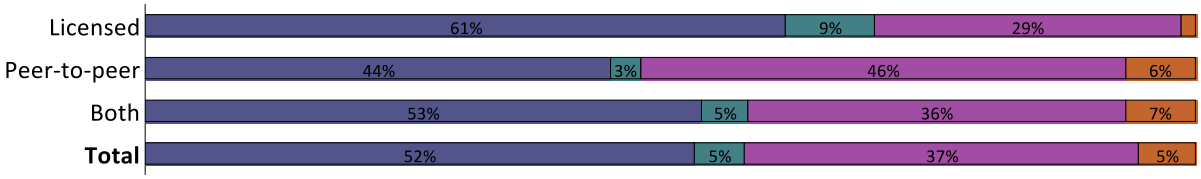
Source: 6t-research bureau, 2015, sample of 889 respondents having already used Uber and whose main motivation for using private hire services is that they consider them more practical than public transport.

Users who find that the services studied are above all more practical than their private car and who only use peer-to-peer transportation services particularly emphasize the fact of not having to drive (46%, compared with 29% of the users of licensed transportation services). This is certainly related to their frequent use of these services for evening recreational activities, which often include the consumption of alcoholic beverages.

Figure 105: Classification of the reasons why private hire services are considered more practical than private cars, by service used

	No need to park	More comfortable	No need to drive	Other	Total
Licensed	**50**	**7**	**24**	**1**	**82**
Peer-to-peer	**48**	**3**	**50**	**7**	**108**
Both	**106**	**9**	**72**	**13**	**200**
Total	**204**	**19**	**146**	**21**	**390**

p = **0.04** ; Khi2 = **12.94** ; dof = **6** (**S**)



Source: 6t-bureau de recherche, 2015, sample of 390 respondents having already used Uber and whose main motivation for using private hire services is that they consider them more practical than private cars.

Analysis of the factors of the choice of mode by urban area of residence

This section aims to determine the extent to which the factors of the use of private hire services vary depending on the user's urban area of residence.

Residents of the Ile-de-France region turn to private hire services for the practical aspect, residents of urban areas other than Paris only have peer-to-peer transportation services available and turn to them for their cost

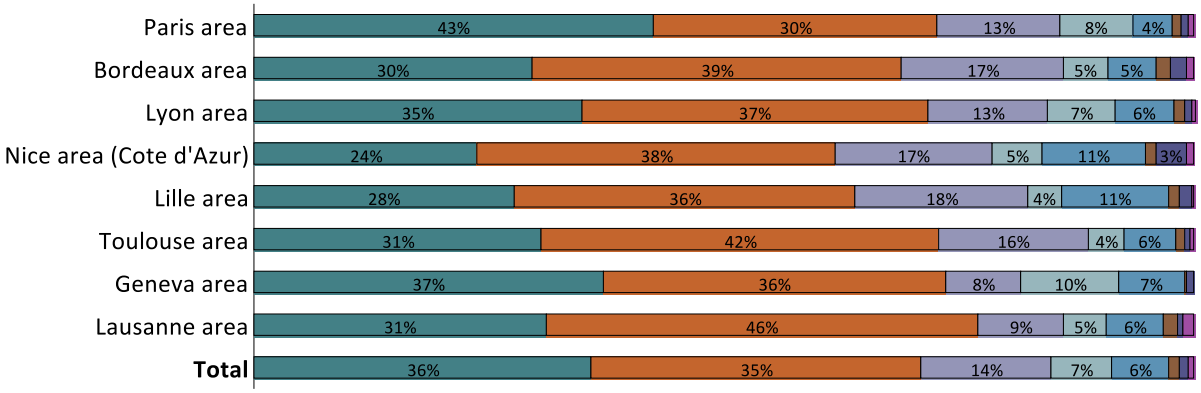
The two most frequently mentioned reasons for the use of these services are their cost and their "practical" aspect in comparison with taxis, regardless of the urban area but not always to the same extent. **Residents of the Paris area are the most sensitive to the "practical" aspect with respect to taxis** (43% compared with 24 to 35% in other French urban areas), which can be

explained by the higher standard of living of Parisian users and the larger proportion of uberX users. Conversely, this "practical" aspect is underrepresented in the responses of users residing in French cities other than Paris and in the Lausanne area: in the Nice-Cote d'Azur area, only 24% of users chose this answer. **Among the users residing in the Toulouse and Lausanne areas, the answer "cheaper than a taxi" is overrepresented**, while it is underrepresented among the users residing in the Paris area (42%, 46% and 30% of the responses, respectively). **uberPOP is the only Uber option available in the Toulouse and Lausanne area**, which certainly contributes to explain this result. The "practical" aspect of private hire services in relation to public transport is more frequently mentioned in the French urban areas other than Paris (between 16 and 18%, excluding Lyon) than in the two main French urban areas (13%), which certainly have better public transport networks, or in the urban areas of Switzerland (8 and 9%).

Figure 106: Classification of the motivations for the use of private hire services, by urban area of residence

	More practical than a taxi	Less expensive than a taxi	More pratical than public transportation	Other	More practical than taking my own car	New form of transportation	Less expensive than taking my own car	Less expensive than public transportation	Total
Paris area	1164	825	356	214	115	25	20	19	2738
Bordeaux area	131	174	76	21	23	7	7	4	443
Lyon area	224	236	82	46	40	7	5	2	642
Nice area (Cote d'Azur)	113	181	79	25	52	6	15	4	475
Lille area	159	207	105	21	65	7	7	2	573
Toulouse area	156	215	81	19	28	5	3	2	509
Geneva area	142	138	31	39	27	1	3	0	381
Lausanne area	120	177	35	18	23	6	2	5	386
Total	2209	2153	845	403	373	64	62	38	6147

p = **<0.01** ; Khi2 = **289.98** ; dof = **49** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,147 respondents having already used Uber and residing in one of the urban areas studied.

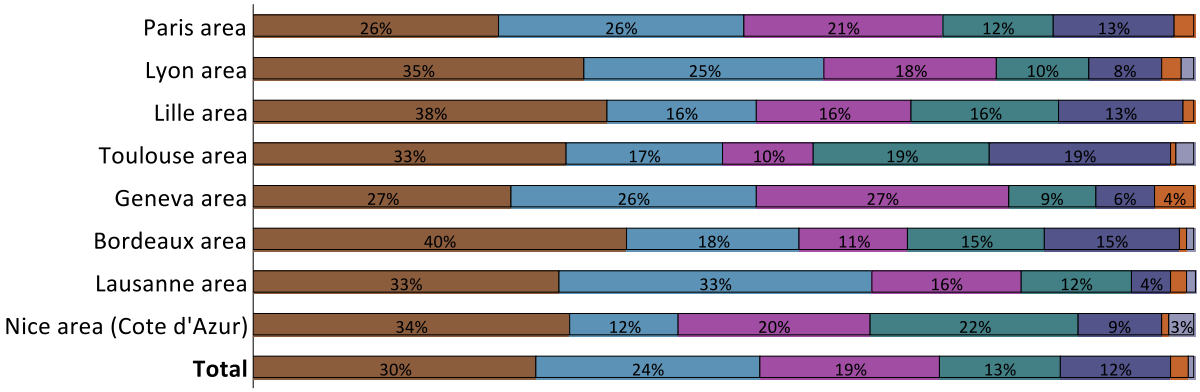
The benefits of private hire services are not the same from one urban area to another

When the users who use private hire services above all because they find them more practical than taxis were invited to clarify their responses, they highlighted different reasons depending on the urban area in which they reside. Thus, the residents of the Paris area especially appreciate not having to provide some means of payment (26% of the responses, compared with 12% on the Cote d'Azur, 16% in the Lille urban area, 12% in the Toulouse area), as well as the more consistent quality of service than for taxis (21% of the responses, compared with 10% in the Toulouse area and 11% in the Bordeaux area). The aspects highlighted vary widely from one urban area to another: thus, users who reside in the Lille and Bordeaux area strongly emphasize the ease of booking with the application (38% and 40%, respectively, compared with 30% of the total sample). In the Lausanne urban area, a third of all users mentioned the fact of not having to provide a means of payment, compared with 24% of all respondents to the question. In the Geneva urban area, the consistency of the quality of service plays a particularly important role (27% of the responses, compared with 19% for all urban areas).

Figure 107: Classification of the reasons why private hire services are considered more practical than taxis, by urban area of residence

	Easier to order via the applic ation	No need to have cash or a credit card on me	Quality of service more constant	Fare known in advance	More often available than a taxi	More comfor table	Other	Total
Paris area	305	303	245	137	148	24	2	1164
Lyon area	79	57	41	22	17	5	3	224
Lille area	60	25	26	25	21	2	0	159
Toulouse area	52	26	15	29	30	1	3	156
Geneva area	39	37	38	13	9	6	0	142
Bordeaux area	52	24	15	19	19	1	1	131
Lausanne area	39	40	19	14	5	2	1	120
Nice area (Cote d'Azur)	38	13	23	25	10	1	3	113
Total	**664**	**525**	**422**	**284**	**259**	**42**	**13**	**2209**

p = **<0.01** ; Khi2 = **128.34** ; dof = **42** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 2,209 respondents having already used Uber, residing in one of the urban areas studied and whose main motivation for using private hire services is that they consider them more practical than taxis.

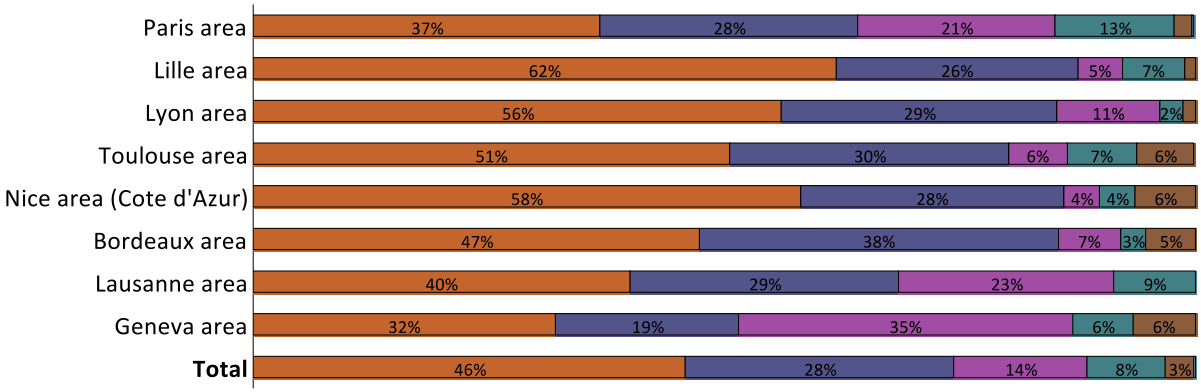
The clarifications of users who find that private hire services are more practical than public transport vary greatly from one urban area to another, but these variations are often not very statistically significant due to a relatively small number of respondents per urban area. **Nevertheless, we observe that the availability of these services at any time is significantly not frequently mentioned in Paris, while it is significantly frequently mentioned in the Lille urban area and on the Côte d'Azur (37%, 62% and 58% of responses, respectively)**. In the Paris area, the overrepresented answers are the comfort of private hire services compared with public transport (21% compared with 14% in the total sample) and the impression of security felt in comparison with public transport (13% compared with 8%). In the Bordeaux urban area, a large number of users particularly appreciate the speed of private hire services compared with public

transport (38% compared with 28% of all responses).

Figure 108: Classification of the reasons why private hire services are considered to be more practical than public transport, by urban area of residence

	Available at any hour of the day and night	Faster / more direct than public transpo rtation	More comfor table than public transpo rtation	Safer than public transpo rtation (robbery, aggression, etc.)	More reliable than public transpo rtation (travel time)	Other	**Total**
Paris area	131	98	74	45	7	1	356
Lille area	65	27	5	7	1	0	105
Lyon area	46	24	9	2	1	0	82
Toulouse area	41	24	5	6	5	0	81
Nice area (Cote d'Azur)	46	22	3	3	5	0	79
Bordeaux area	36	29	5	2	4	0	76
Lausanne area	14	10	8	3	0	0	35
Geneva area	10	6	11	2	2	0	31
Total	**389**	**240**	**120**	**70**	**25**	**1**	**845**

p = **<0.01** ; Khi2 = **96.42** ; dof = **35** (**VS**)



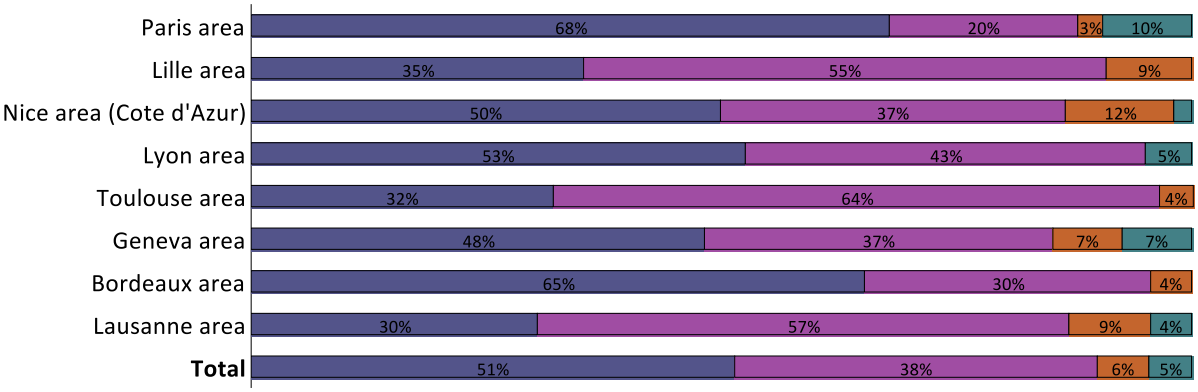
Source: 6t-bureau de recherche, 2015, sample of 845 respondents having already used Uber, residing in one of the urban areas studied and whose main motivation for using private hire services is that they consider them more practical than public transport.

Concerning the clarifications made by the users who find that private hire services are above all more practical than their own car, due to the limited numbers by urban area, we simply retain the fact that the respondents residing in the Paris urban area particularly appreciate not having to look for a parking place (68% of their responses compared with 51% of all responses), while those residing in the Lille urban area highlighted the fact of not having to drive (55% compared with 38%).

Figure 109: Classification of the reasons why private hire services are considered more practical than private cars, by urban area of residence

	No need to park	No need to drive	Other	More comfortable	Total
Paris area	78	23	3	11	115
Lille area	23	36	6	0	65
Nice area (Cote d'Azur)	26	19	6	1	52
Lyon area	21	17	0	2	40
Toulouse area	9	18	1	0	28
Geneva area	13	10	2	2	27
Bordeaux area	15	7	1	0	23
Lausanne area	7	13	2	1	23
Total	**192**	**143**	**21**	**17**	**373**

p = **<0.01** ; Khi2 = **59.27** ; dof = **21** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 373 respondents having already used Uber, residing in one of the urban areas studied and whose main motivation for using private hire services is that they consider them more practical than private cars.

IN SHORT: THE FACTORS GOVERNING THE CHOICE OF UBER

Information about Uber is distributed mainly through word-of-mouth. The reputation of Uber among its users is therefore particularly important for its development.

Uber is used by a majority of users because it is more convenient and less expensive than taxis. Users of licensed transportation services place the greatest value on the practical aspect and quality service, while the users of peer-to-peer transportation services are more attracted by the price.

If Uber users consider it more practical than taxis, it is due to the smartphone application and automatic payment by direct debit: technical advantages which could very well be adopted by taxis if they wish to compete against Uber.

Uber inspires more confidence in its users than do taxis with their users. In the Paris urban area, 53% of Uber users would be willing to let their unaccompanied child travel in an Uber vehicle, while only 38% taxi users of would be prepared to allow their unaccompanied child do the same in a taxi.

Thus, in the eyes of its users, private hire services appear to be reliable (i.e. available at any hour), safe (people have confidence in these services) and accessible in terms of price.

2.2 THE IMAGE OF THE MODES AND SOCIOTYPES

The image users have of the modes of transport

We asked the respondents to name up to three adjectives that spontaneously come to mind to qualify:

- public transport;
- the private car (as an owner);
- the bicycle;
- private hire services.

This section analyses the perception of these four modes of transport by Uber users, such as we can extrapolate from the analysis of these adjectives. In order to process this information, we selected from among the respondents to the survey those who met all the following conditions:

- having used a private hire service at least once;
- having made their most recent journey with a private hire service in their department of residence;
- having quoted at least one adjective to describe each of the four modes of transport (public transport, personal car, bicycle and private hire service).

Among the 4,923 users who met all of these conditions, we then chose by random selection:

- 800 users residing in the Paris urban area;
- 500 users residing in the Lyon urban area;
- 200 users residing in each of the other six other urban areas studied,

i.e. a final sample of 2,500 users.

The following table presents the classification of the 10 most frequently mentioned adjectives by these users to describe public transport, the private car, the bicycle and private hire services respectively.

Among these four modes, public transport is the one which suffers from the poorest image. Eight of the ten most frequently mentioned adjectives to qualify this mode have a negative connotation. The two most frequently mentioned adjectives to qualify public transport are

"slow" (mentioned by 42% of users), and "crowded" (mentioned by 33%). In addition, public transport is the mode that the lowest proportion of respondents consider practical (21% compared with 30% who find the bicycle "practical" and 40% who qualify the private car as "practical"). Eighteen percent qualify public transport as "inexpensive", but 10% qualify it as "expensive".

Users have a contrasting image of the private car, which reveals conflicting perceptions. This mode is considered as a vector of "independence" (by 40% of users) but also as "restrictive" (20%); "fast" (19%) and "slow" (11%). Other adjectives appear that refer to the issue of public well-being with respect to the use of private cars: "selfish / personal" (8%) and "polluting" (7%).

The bicycle is above all considered as a mode that is "athletic/ healthy" (34%) and "dangerous" (33%). It is less often qualified as "practical" than the car (30% compared with 40%). We can make the assumption that users associate the bicycle above all with physical performance and danger, and that it is only partially integrated among the range of modes used for their daily travel. The proportion of users who regard it as "slow" (15%) is equal to the proportion of users who define it as "fast".

Private hire services are by far the mode that has the best image among the respondents. They are much more often qualified as "practical" than the other modes (63%, compared with 40% for the car, 30% for the bicycle and 21% for public transport). They also appear as very "inexpensive" (45%) and "fast" (38%). Some of the most frequently mentioned adjectives used to describe them are specific to them, to the extent that they do not appear in the list of the most frequently mentioned adjectives to qualify the other modes. These adjectives are "easy" (14%), which probably refers to the ease of access thanks to smartphone applications, "safe" (11%), "user-friendly" (11%) and "available" (10%). The only negative adjective appears at the bottom of the classification: "expensive", which is mentioned by only 7% of the users.

Figure 110: Classification of the 10 most frequently mentioned adjectives by Uber users to describe public transport, the private car, the bicycle and private hire services

Public transport	% obs.	Private car	% obs.	Bicycle	% obs.	Private hire services	% obs.
Slow	**42%**	Expensive	**49%**	Athletic / healthy	**34%**	Practical	**63%**
Crowded	**33%**	Practical	**40%**	Dangerous	**33%**	Inexpensive	**45%**
Practical	**21%**	Comfortable	**25%**	Practical	**30%**	Fast	**38%**
Unreliable	**21%**	Restrictive	**20%**	Tiring	**25%**	Pleasant	**23%**
Dirty	**19%**	Fast	**19%**	Ecological	**23%**	Comfortable	**19%**
Inexpensive	**18%**	Provides freedom or independence	**16%**	Slow	**15%**	Easy	**14%**
Uncomfortable	**14%**	Pleasant	**12%**	Fast	**14%**	Safe	**11%**
Restrictive	**12%**	Slow	**11%**	Pleasant	**14%**	User-friendly	**11%**
Expensive	**10%**	Selfish / personal	**8%**	Inexpensive	**14%**	Available	**10%**
Insufficient	**9%**	Polluting	**7%**	Recreation	**7%**	Expensive	**7%**

Source: 6t-bureau de recherche, 2015, sample of 2,500 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is under study.

The image of the modes of transport depending on the service used

This section aims to determine the extent to which users' perceptions of the various modes of transportation vary depending on whether they use licensed driver or peer-to-peer transportation services.

Concerning the image of public transport, we observe that users of licensed transportation services have the greater tendency to quote adjectives relating to the impression of discomfort and inconvenience felt when using this mode. Thus, 25% qualify public transport as dirty, compared with 10% of users **who only use peer-to-peer transportation services.** The **latter have a greater tendency to highlight adjectives from a utilitarian point of view, such as "slow"** (48%, compared with 37% of licensed transportation services) **or "insufficient"** (13%), **which reveals the willingness to see public transport develop further.**

Figure 111: Classification of the 10 most frequently mentioned adjectives by Uber users to describe public transport, by service used

Licensed driver	% obs.	**Peer-to-peer driver**	% obs.	**Both**	% obs.
Slow	**37%**	Slow	**48%**	Slow	**41%**
Crowded	**34%**	Crowded	**27%**	Crowded	**36%**
Dirty	**25%**	Practical	**26%**	Unreliable	**22%**
Practical	**23%**	Unreliable	**21%**	Dirty	**21%**
Unreliable	**20%**	Inexpensive	**19%**	Practical	**19%**
Inexpensive	**18%**	Restrictive	**13%**	Inexpensive	**18%**
Uncomfortable	**16%**	Insufficient	**13%**	Uncomfortable	**16%**
Fast	**12%**	Expensive	**13%**	Restrictive	**12%**
Restrictive	**9%**	Uncomfortable	**11%**	Noisy	**10%**
Expensive	**9%**	Dirty	**10%**	Not practical	**9%**

Source: 6t-bureau de recherche, 2015, sample of 2,500 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is under study.

If **the users of licensed transportation services** highlight the uncomfortable aspect of public transport, they **very largely view the private car as a mode that is both pleasant and comfortable.** Thus, 32% of them qualify it as "comfortable", compared with 20% of the **users of peer-to-peer transportation services**. The latter **have a more utilitarian view of the private car, which they consider as "practical"** (46% compared with 33% of the users of licensed transportation services) **or "fast"** (23% compared with 16%).

Figure 112: Classification of the 10 most frequently mentioned adjectives by Uber users to describe the private car, by service used

Licensed driver	% obs.	**Peer-to-peer driver**	% obs.	**Both**	% obs.
Expensive	**42%**	Expensive	**55%**	Expensive	**49%**
Practical	**33%**	Practical	**46%**	Practical	**40%**
Comfortable	**32%**	Fast	**23%**	Comfortable	**25%**
Provides freedom or independence	**18%**	Comfortable	**20%**	Restrictive	**21%**
Restrictive	**18%**	Restrictive	**20%**	Fast	**18%**
Fast	**16%**	Provides freedom or independence	**13%**	Provides freedom or independence	**17%**
Pleasant	**14%**	Pleasant	**12%**	Slow	**12%**
Slow	**12%**	Polluting	**9%**	Pleasant	**11%**
Selfish / personal	**9%**	Slow	**8%**	Selfish / personal	**8%**
Not practical	**6%**	Relaxed	**7%**	Relaxed	**7%**

Source: 6t-bureau de recherche, 2015, sample of 2,500 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is under study.

Users of licensed transportation services a more likely to highlight the "dangerous" aspect of the bicycle than users of peer-to-peer transportation services (42% compared with 27%). Conversely, the latter place more emphasis on the "practical" aspect of this mode (33% compared with 21%).

Figure 113: Classification of the 10 most frequently mentioned adjectives by Uber users to describe the bicycle, by service used

Licensed driver	% obs.	**Peer-to-peer driver**	% obs.	**Both**	% obs.
Dangerous	**42%**	Athletic / healthy	**34%**	Dangerous	**34%**
Athletic / healthy	**35%**	Practical	**33%**	Athletic / healthy	**33%**
Tiring	**24%**	Dangerous	**27%**	Practical	**31%**
Practical	**21%**	Tiring	**25%**	Tiring	**25%**
Ecological	**19%**	Ecological	**23%**	Ecological	**24%**
Fast	**16%**	Slow	**17%**	Pleasant	**15%**
Slow	**13%**	Fast	**15%**	Slow	**14%**
Pleasant	**13%**	Inexpensive	**14%**	Fast	**14%**
Inexpensive	**11%**	Pleasant	**13%**	Inexpensive	**14%**
Uncomfortable	**9%**	Restrictive	**8%**	Recreation	**9%**

Source: 6t-bureau de recherche, 2015, sample of 2,500 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is under study.

Logically, **users of peer-to-peer transportation services place more importance** on the **"inexpensive" aspect of private hire services** than users of licensed transportation services (60% compared with 31%). They also more willingly qualify this mode as "user-friendly" (14% compared with 8%). **Users of licensed transportation services place more value on the "comfortable"** (26% compared with 12%) **and "pleasant" aspects** (26% compared with 18%) **of the mode.**

Figure 114: Classification of the 10 most frequently mentioned adjectives by Uber users to describe private hire services, by type of service used

Licensed driver	% obs.	**Peer-to-peer driver**	% obs.	**Both**	% obs.
Practical	**60%**	Practical	**62%**	Practical	**65%**
Fast	**32%**	Inexpensive	**60%**	Inexpensive	**41%**
Inexpensive	**31%**	Fast	**42%**	Fast	**38%**
Comfortable	**26%**	Pleasant	**18%**	Pleasant	**24%**
Pleasant	**26%**	User-friendly	**14%**	Comfortable	**20%**
Easy	**13%**	Easy	**14%**	Easy	**14%**
Expensive	**12%**	Comfortable	**12%**	Safe	**12%**
Safe	**11%**	Available	**11%**	User-friendly	**11%**
Available	**9%**	Safe	**11%**	Available	**10%**
User-friendly	**8%**	Future	**5%**	Expensive	**7%**

Source: 6t-bureau de recherche, 2015, sample of 2,500 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is under study.

The image of private hire services, by urban area of residence

This section aims to determine the extent to which the image of private hire services varies depending on the users' urban area of residence.

The most obvious difference in the classification of adjectives appears between the Paris urban area and the other French urban areas. **In the Paris urban area, the adjective "fast" is more frequent (34%) than the adjective "inexpensive" (29%), the opposite of all the other urban areas.** Users residing in the Paris urban area also more often use the adjective "comfortable" than those of other urban areas (27% compared with 12% in the Bordeaux area 11% in the Toulouse area): this is most likely due to the high proportion of UberX users in the Paris urban area whereas no licensed transportation service is available in the Bordeaux and Toulouse areas.

Characteristics that are specific to the other French urban areas may also be observed. The adjective "easy" is particularly frequently mentioned by users residing in the Lille area (18% compared with 11% in the Lyon area). **In the Toulouse area, the adjective "safe" is mentioned particularly often** (18% compared with 7% in the Bordeaux area where the climate of intimidation against Uber drivers is high).

Figure 115: Classification of the 10 most frequently mentioned adjectives by Uber users to describe private hire services, by urban area of residence

Paris area	% obs.	Bordeaux area	% obs.	Lyon area	% obs.	Côte d'Azur	% obs.	Lille area	% obs.	Toulouse area	% obs.
Practical	**66%**	Practical	**60%**	Practical	**63%**	Practical	**58%**	Practical	**62%**	Practical	**70%**
Fast	**34%**	Inexpensive	**56%**	Inexpensive	**44%**	Inexpensive	**52%**	Inexpensive	**53%**	Inexpensive	**53%**
Inexpensive	**29%**	Fast	**40%**	Fast	**42%**	Fast	**41%**	Fast	**44%**	Fast	**45%**
Comfortable	**27%**	Pleasant	**22%**	Pleasant	**25%**	Pleasant	**27%**	Easy	**18%**	Pleasant	**19%**
Pleasant	**26%**	Easy	**16%**	Comfortable	**17%**	Comfortable	**16%**	Pleasant	**17%**	Safe	**18%**
Easy	**15%**	User-friendly	**16%**	User-friendly	**13%**	Easy	**15%**	Comfortable	**14%**	Easy	**12%**
Safe	**13%**	Available	**14%**	Available	**11%**	User-friendly	**14%**	Available	**13%**	Available	**12%**
User-friendly	**11%**	Comfortable	**12%**	Easy	**11%**	Available	**11%**	Safe	**11%**	Comfortable	**11%**
Expensive	**10%**	Safe	**7%**	Safe	**11%**	Safe	**10%**	User-friendly	**9%**	User-friendly	**10%**
Available	**10%**	Expensive	**7%**	Expensive	**6%**	Expensive	**5%**	Expensive	**6%**	Useful	**7%**

Source: 6t-bureau de recherche, 2015, sample of 2,100 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is being studied.

Users residing in the Geneva urban area are particularly likely to consider private hire services as a mode of transport of the "future" (15%), as well as the users residing in the Lausanne urban area, but to a lesser extent (8%). This adjective does not appear in the classification of any French urban area: thus, there is a Swiss specificity concerning this point. **Users residing in the Lausanne urban area also have a greater tendency to consider private hire services as "inexpensive" (71%, compared with 29 to 56% in the other cities).**

Figure 116 - Classification of the 10 most frequently mentioned adjectives by Uber users to describe private hire services, by urban area of residence (Switzerland)

Geneva area	% obs.	**Lausanne area**	% obs.
Practical	**58%**	Inexpensive	**71%**
Inexpensive	**47%**	Practical	**62%**
Fast	**30%**	Fast	**35%**
Comfortable	**20%**	Pleasant	**19%**
Pleasant	**18%**	Easy	**12%**
Future	**15%**	Comfortable	**12%**
Easy	**14%**	User-friendly	**11%**
Safe	**10%**	Safe	**11%**
Expensive	**9%**	Future	**8%**
User-friendly	**8%**	Available	**7%**

Source: 6t-bureau de recherche, 2015, sample of 400 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is being studied.

Taxis and private hire services as seen by their users: a very different point of view

We compared the most frequently mentioned adjectives by taxi users who reside in French urban areas over 100,000 inhabitants (Paris urban area included)[27] to qualify taxis with the adjectives that are the most frequently mentioned by the users of private hire services to qualify those services. For the sake of accuracy, we differentiated the adjectives mentioned by users who only use licensed transportation services and the adjectives mentioned by those who only use peer-to-peer transportation services.

Taxi users have a very different point of view of taxis than the users of private hire services have of these services.

Thus, **the most frequently mentioned adjective by taxi users to qualify taxis is "expensive" (mentioned by 62% of them). This adjective is not part of the list of the 10 most frequently mentioned adjectives by the users of peer-to-peer transportation services and only appears in the 7th position of the list of adjectives quoted by users of licensed transportation services** (only 12% of them quote it).

The positive adjectives mentioned by taxi users to define taxis are similar to those mentioned by the users of private hire services to define them: "practical", "fast", "comfortable", "available".

[27] This represents a sub-sample of 741 taxi users among the 1001 surveyed by 6t-bureau de recherche (2015).

However, **10% of taxi users describe the taxi as "unpleasant", which makes this adjective the 5th most frequently mentioned, whereas it is not part of the list of adjectives most mentioned by the users of private hire services to qualify those services.** In addition, the proportion of taxi users who mention the adjective "pleasant" to qualify taxis (6%) is lower than that of the users of private hire services who mention it (26% of users of licensed transportation services and 18% of the users of peer-to-peer transportation services). The adjective "unpleasant" and other assimilated adjectives are often mentioned by taxi users to qualify taxi drivers. Taxi users thus seem less satisfied with the behavior of taxi drivers than the users of private hire services with the drivers working for these services, including when the drivers in question are not licensed.

Figure 117 : Comparison of the most frequently mentioned adjectives by taxi users to qualify taxis with the most frequently mentioned adjectives by users of private hire services to qualify those services

Taxi	% obs.	**Car with licensed driver**	% obs.	**Car with peer-to-peer driver**	% obs.
Expensive	**62%**	Practical	**60%**	Practical	**62%**
Practical	**51%**	Fast	**32%**	Inexpensive	**60%**
Fast	**30%**	Inexpensive	**31%**	Fast	**42%**
Comfortable	**25%**	Comfortable	**26%**	Pleasant	**18%**
Unpleasant	**11%**	Pleasant	**26%**	User-friendly	**14%**
Available	**10%**	Easy	**13%**	Easy	**14%**
Useful	**7%**	Expensive	**12%**	Comfortable	**12%**
Relaxed	**7%**	Safe	**11%**	Available	**11%**
Pleasant	**6%**	Available	**9%**	Safe	**11%**
Safe	**6%**	User-friendly	**8%**	Future	**5%**

Source: 6t-bureau de recherche, 2015, sample of 2,500 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is under study / 6t-bureau de recherche, 2015, sample of 714 taxi users residing in an urban area with over 100,000 inhabitants.

Distribution of users of private hire services according to sociotypes of mobility

Presentation of the sociotypes of mobility

While most of the studies of the choice of households concerning the different modes of transport focus on the price or the time, 6t-bureau de recherche proposes an innovative approach combining time, prices, the preferences and habits of use of the different modes of transport.

The population is classified by their tendency to prefer different modes from data gathered during the Households-Travel Survey. Constructed on the basis of modal habits, representations of the automobile and public transport and the conditions of use of the automobile, the sociotypes developed by 6t-bureau de recherche each respond to a combination of specific logics of action.

The sociotypes are built around the following three aspects:

- **the aspect of modal habits** differentiates those persons who only use one mode of transport from those who use several modes. This modality is informed by the frequency of use of the different modes of transport.
- **the aspect of values** differentiates those respondents who qualify the transport offer depending on individual interest (provides freedom, comfortable, etc.) from those who qualify the transport offer depending on the general interest (ecological, polluting, etc.) This modality is informed by the adjectives mentioned spontaneously during the survey.
- **the aspect of attitude** differentiates the respondents depending on their preferences of usage, i.e. of the opinion (positive, neutral or negative) they have of the different modes of transport. This modality is determined from the spontaneously mentioned adjectives.

Based on these aspects, the typology was developed from principal component factor analysis in the form of variables on which a cluster analysis was performed. The robustness of the groups thus created was then tested with the aid of log-linear topology models to ensure the identical structure of the construction in different contexts (different urban areas and types of context of residence).

The groups are characterized by a high degree of homogeneity with regards to the logics of action underlying the modal practices, in particular with respect to:

- the differentiation between the adjectives that are favorable to public transport (fast, practical, ecological, etc.) and those that are unfavorable (expensive, slow, restrictive, etc.);
- the differentiation between the adjectives relating to costs of travel by public transport which opposes "expensive" to "inexpensive";
- a strong differentiation between the ecological aspect of public transport and the polluting character of the private car;
- the strong differentiation according to the usage of the modes of transport.

In order to ensure the reproducibility and comparability of the method, the complexity of the Principal Component Analyses having enabled the construction of the principles of this typology, it was simplified into an analytical method from the variables used for its construction. The typology obtained by these means was optimized so as to be as close as possible to the sociotypes derived from the multivariate analyses. In the end, eight sociotypes were retained.

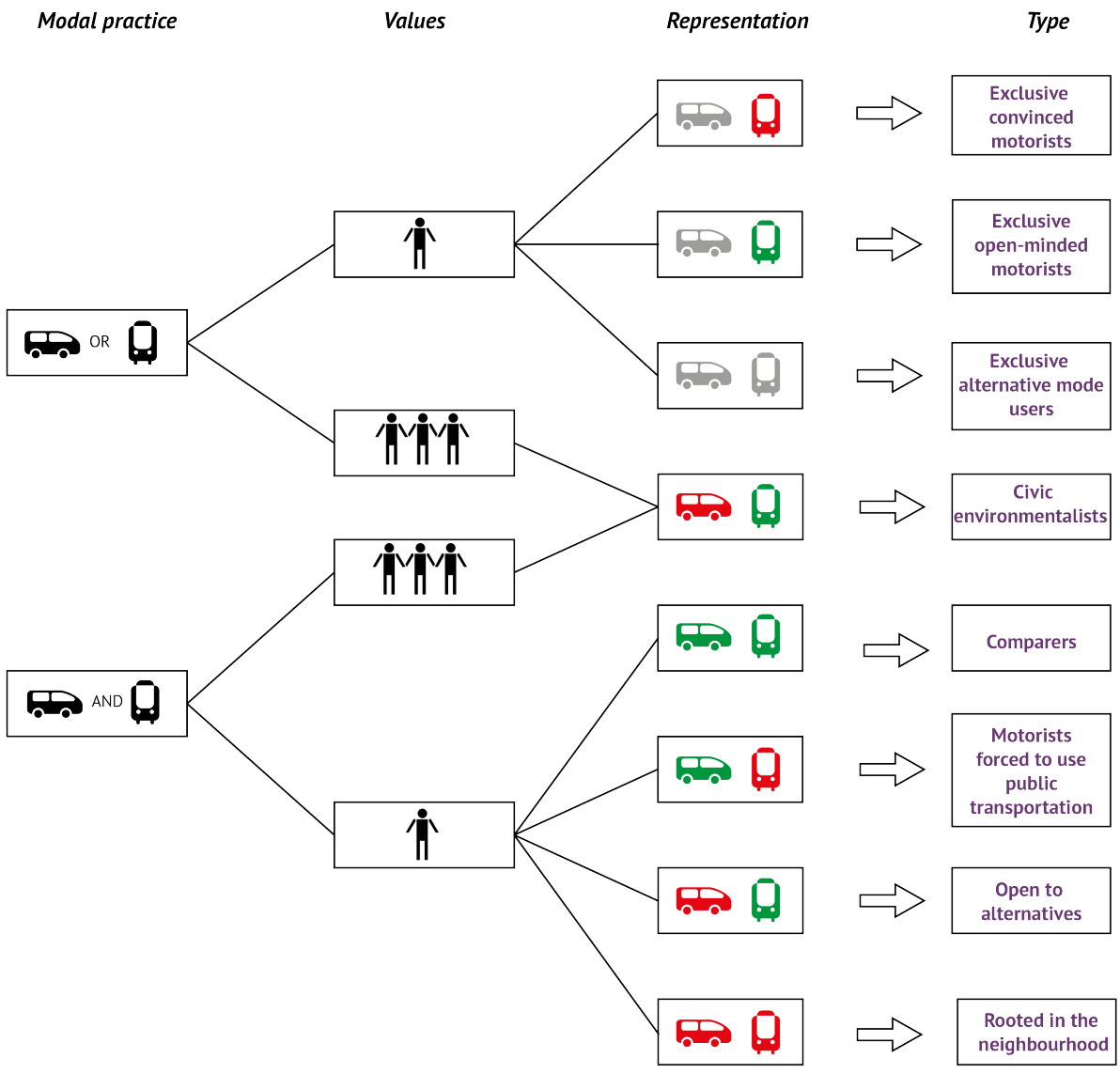
The eight sociotypes proposed by 6t-bureau de recherche are the following:

- **"Exclusive convinced motorists"**: they only use private cars in their daily lives and have a poor image of public transport. Their spatial habits are structured around the accessibility provided by this mode of transport;
- **"Exclusive open-minded motorists"**: they only use private cars in their daily lives but do not have a poor image of public transport. Their spatial habits are structured around the accessibility provided by this mode of transport;
- **"Exclusive alternative mode users":** they are a captive group who never use private cars. Their spatial habits are structured around the accessibility provided by public transport, walking and cycling;
- **"Motorists forced to use public transportation":** they prefer to use private cars but the conditions of parking or traffic force them to use another mode of transport for certain day-to-day destinations;
- **"Open to alternatives":** they prefer to use public transport, walk or cycle rather than use private cars for the characteristics of the mobility offered by these modes of transport;
- **"Comparers":** they use the fastest mode of transport. They have a good knowledge of the possibilities of public transport and private cars and choose their modes of transport on a case-by-case basis for each journey. They are the ultimate multimodal users;
- **"Civic environmentalists"**: they prefer to use environmentally friendly modes of transport to conform to their convictions;
- **"Rooted in the neighborhood":** they do not like to travel by modes of motorized transport, their spatial patterns are structured around the active modes and the offer of services provided locally.

The theoretical construction of these eight sociotypes is schematized below. The sociotypes enable us to differentiate the inhabitants according to:

- **their modal habits,** between the monomodals who use a single mode of transport and the multimodals who use multiple modes (even if this is occasional),
- **their values** with respect to mobility depending on whether they view the modes of transport from a collective or individual point of view;
- **their attitudes** to know whether their image of the different modes of transport is positive, negative or neutral.

Figure 118: Diagram of the composition of sociotypes



The two sociotypes which dominate: "Motorists forced to use public transport" and those who are "rooted in their neighborhood"

Two thirds of users (61%) are represented by two of the eight sociotypes and are consequently very dominant.

The most represented sociotype is that of the "motorists forced to use public transport" (33%). These users have a good image of the private car and a poor image of public transport, but they are forced to use public transport by the difficulties of traffic, parking and the cost of cars in the city. **These users would prefer to use private cars but the policies of restriction prevent them from doing so.** In this sense, just as with most other offers of shared cars (car-sharing, carpooling, taxi, etc.), **private hire services can facilitate the social acceptability of the so-called "ecomobility" measures.**

The second most represented sociotype is the "rooted in the neighborhood" group (28% of users). These users use private cars and public transport but have a poor image of both. They thus tend to rely on alternatives to these two modes and prefer to use active modes whenever they can. Indeed, their spatial habits are structured around the neighboring offer of employment, services, facilities or recreation. **Private hire services are perhaps the only mode of transport that they use willingly and this provides an opportunity to expand the territory of choice for these residents.**

There are relatively few "comparers" among the users of private hire services (10%), which means that the service is rather simple to use. The development of the use of these private hire services booked via smartphone applications like Uber is still recent. It is possible that the "comparers" will become more numerous in the long term.

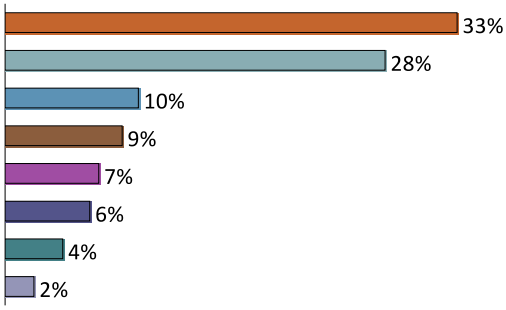
Compared with a survey of the inhabitants of the core cities with over 100,000 inhabitants, Uber users have a very high proportion of "motorists forced to use public transportation" (33% compared with 8%) and "rooted in the neighborhood" (28% compared with 7%). Conversely, in comparison with the population of the core cities with more than 100,000 inhabitants, **some sociotypes are underrepresented** among Uber users: **This is the case of the "exclusive alternative mode users" (7% compared with 23%), of " exclusive convinced motorists" (6% compared with 8%), "exclusive open-minded motorists" (4% compared with 15%) and "civic environmentalists" (2% compared with 10%)** (6t, 2010).

The distribution of Uber users by sociotype has strong similarities with the distribution of Autolib' users (6t, 2014). The two most represented types among these latter are also the "motorists forced to use public transport" (31%) and the "rooted in the neighborhood" group (30%). Thus, the rooted in the neighborhood group are just as well represented among the users

of private hire services as among the various car-sharing services: 30% for Autolib' Paris, 21% for Citiz, 27% for Communauto Paris[28]. **Private hire services and car-sharing services thus seem to be directed towards groups that have similar predispositions with respect to the different modes of transport.**

Figure 119: Distribution of Uber users by sociotype of mobility

	Nbr	IC
Motorists forced to use public transportation	**835**	**32% < f < 35%**
Rooted in the neighbourhood	**704**	**27% < f < 29%**
Comparers	**249**	**9% < f < 11%**
Open to alternatives	**217**	**8% < f < 9%**
Exclusive alternative mode users	**175**	**6% < f < 8%**
Exclusive convinced motorists	**158**	**6% < f < 7%**
Exclusive open-minded motorists	**108**	**4% < f < 5%**
Civic environmentalists	**54**	**2% < f < 3%**
Total	**2500**	



Source: 6t-bureau de recherche, 2015, sample of 2,500 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is under study.

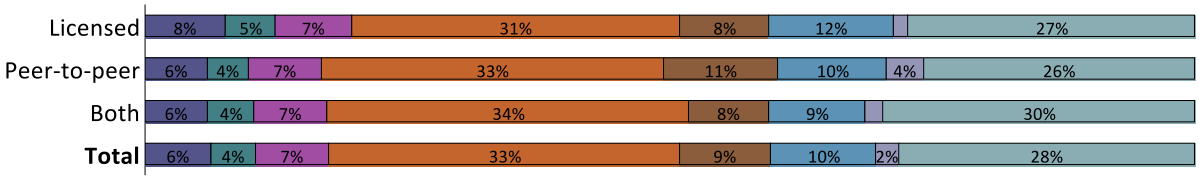
The distribution of users by sociotype does not vary significantly depending on the type of service used (licensed or peer-to-peer driver). Thus, the users have different socio-economic profiles depending on the type of service used and their motivations for the use of these services. They use them in different ways, but beyond all these differences they remain users who have the same predispositions with respect to the use of the different modes of transport.

[28] 6t-bureau de recherche, 2014, *ENA.3 – Enquête sur l'autopartage en trace directe (the case of Autolib' Paris). L'autopartage en trace directe : quelle alternative à la voiture particulière ?*, p. 64.

Figure 120: Sociotypes of mobility by type of service used

	Exclusive convinced motorists	Exclusive open-minded motorists	Exclusive alternative mode users	Motorists forced to use public transportation	Open to alternatives	Comparers	Civic environmentalists	Rooted in the neighbourhood	Total
Licensed	**32**	**20**	**30**	**130**	**35**	**49**	**6**	**113**	**415**
Peer-to-peer	**41**	**26**	**47**	**220**	**74**	**70**	**24**	**174**	**676**
Both	**85**	**62**	**98**	**485**	**108**	**130**	**24**	**417**	**1409**
Total	**158**	**108**	**175**	**835**	**217**	**249**	**54**	**704**	**2500**

p = **0.07** ; Khi2 = **22.24** ; dof = **14** (**LS**)



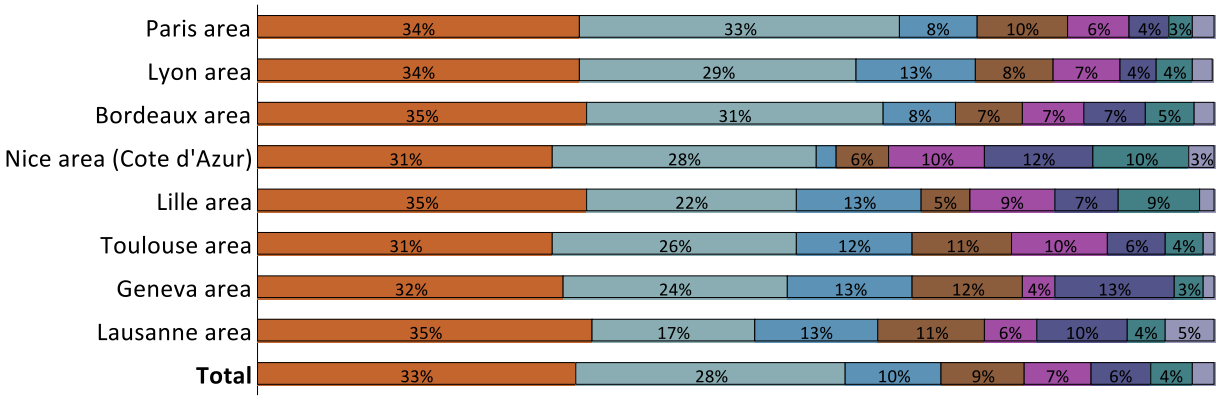
Source: 6t-bureau de recherche, 2015, sample of 2,500 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is being studied.

Although **the distribution of sociotypes** does not vary significantly according to the type of service used, it **varies significantly depending on the users' urban area of residence.** If the "forced motorists" are represented in an equivalent way in all urban areas, **the "rooted in the neighborhood" are overrepresented in the Paris urban area (33% compared with 28% in the total sample), no doubt due to traffic conditions that are more difficult than in the other areas** (saturation of the roads and public transport networks), **which contribute to a negative image of both public transport and the private car.** In contrast, the "rooted in the neighborhood" group is significantly underrepresented in the Lausanne urban area (22% and 17%, respectively). On the Côte d'Azur, the "exclusive motorists" are strongly overrepresented (22% compared with 10% of the total sample). This means that in this urban area, a high proportion of users never use public transport, preferring the private car, but nevertheless consider that private hire services may be more appropriate than their own car in certain circumstances.

Figure 121: Sociotypes of mobility by urban area of residence

	Motorists forced to use public transportation	Rooted in the neighbourhood	Comparers	Open to alternatives	Exclusive alternative mode users	Exclusive convinced motor ists	Exclusive open-minded motorists	Civic environmentalists	Total
Paris area	**270**	**267**	**65**	**76**	**51**	**34**	**20**	**17**	**800**
Lyon area	**169**	**144**	**63**	**40**	**35**	**19**	**19**	**11**	**500**
Bordeaux area	**69**	**62**	**15**	**14**	**13**	**13**	**10**	**4**	**200**
Nice area (Cote d'Azur)	**62**	**55**	**4**	**11**	**20**	**23**	**20**	**5**	**200**
Lille area	**69**	**44**	**26**	**10**	**18**	**13**	**17**	**3**	**200**
Toulouse area	**62**	**51**	**24**	**21**	**20**	**12**	**8**	**2**	**200**
Geneva area	**64**	**47**	**26**	**23**	**7**	**25**	**6**	**2**	**200**
Lausanne area	**70**	**34**	**26**	**22**	**11**	**19**	**8**	**10**	**200**
Total	**835**	**704**	**249**	**217**	**175**	**158**	**108**	**54**	**2500**

p = **<0.01** ; Khi2 = **146.83** ; dof = **49** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 2,500 respondents having already used Uber, having made their most recent journey with Uber in the urban area where they reside and having quoted at least one adjective to describe each of the four modes whose image is being studied.

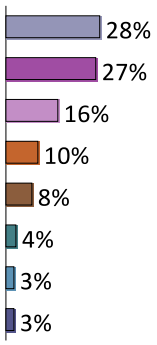
Users of private hire services are more "rooted in their neighborhood" than taxi users

"Motorists forced to use public transport" are also the most represented sociotype (28% of respondents) among taxi users. The "comparers" follow closely (27%), highlighting the fact that taxi users take a taxi car because they can hail it in the street.

Unlike the users of private hire services, the "rooted in their neighborhood" group are only in the fourth position (10%). The taxi, at least in France, does not appear as a day-to-day option, unlike private hire services.

Figure 122: Distribution of taxi users by sociotype of mobility

	Nbr	IC
Motorists forced to use public transport	**285**	**26% < f < 31%**
Comparers	**273**	**25% < f < 29%**
Exclusive alternative modes	**163**	**15% < f < 18%**
Rooted in the nieghbourhood	**100**	**9% < f < 11%**
Open to alternatives	**81**	**7% < f < 9%**
Exclusive convinced motorists	**36**	**3% < f < 4%**
Exclusive open-minded motorists	**30**	**2% < f < 4%**
Civic environmentalists	**26**	**2% < f < 3%**
Total	**1001**	



Source: 6t-bureau de recherche, 2015, online survey of 1001 taxi users in France

IN SHORT: THE PREDISPOSITION OF UBER USERS WITH RESPECT TO THE MODES OF TRANSPORT

Uber benefits from an excellent image in the eyes of its users: it is the mode with which they are by far the most satisfied. In contrast, users of private hire services have a very negative image of public transport. Their image of the car is contrasting and contradictory from one user to another. The bicycle does not appear to be very well considered from the utilitarian aspect (speed, cost) and is seen as a mode that is linked to recreational activities.

The relationship to the transport offer is different depending on the service used: while users of peer-to-peer transportation services above all search for efficiency (cost / travel time ratio), users of licensed transportation services are more inclined to consider the transport offer from the perspective of comfort and pleasantness, without losing sight of the utilitarian aspect.

The dominant sociotype among the users of private hire services is that of the "motorists forced to use public transport". These users would prefer to use private cars but the policies of restriction prevent them from doing so. In this sense, just as with most other offers of shared cars (car-sharing, carpooling, taxi, etc.), private hire services can facilitate the social acceptability of the so-called "ecomobile" measures.

The second most represented sociotype is the "rooted in their neighborhood" group. These are users who always prefer active modes to the private car or public transport. Indeed, their spatial habits are structured around the neighboring offer of employment, services, facilities or recreation. Whereas the "rooted in their neighborhood" are well represented in the various car-sharing services, they are a minority among taxi users. In this sense, private hire services appear to provide a better opportunity than taxis to expand the territory of choice for residents.

“Comparers” are few among users of private hire services. In contrast, they are well represented among taxi users. This difference could be come from the fact that taxi users can hail a taxi in the street (or can take another mode if there is no taxi in the street).

The distribution of the sociotypes does not vary depending on the type of service used (licensed or peer-to-peer drivers): if the users of both types of service present different profiles, motivations and practices, they are similar in their predisposition towards the different modes of transport.

3. ESTIMATING THE IMPACTS

3.1 ENVIRONMENTAL IMPACTS

Private hire services influence mobility behavior…

Nearly two-thirds of the users (64%) feel that their changes of habits in the use of modes of transport are directly due to their use of private hire services. What are the nature and magnitude of these changes? How is the ownership of means of transport and the frequency of use of the different modes of transport evolving?

Figure 123: Distribution of uses of Uber by the main factor in the evolution of mobility behavior

Would you say that the changes in the ways you use the means of transportation are mainly due to:

	Nbr	IC	
Your use of ride-sourcing transportation solutions ([V16], etc.)	**4155**	**63% < f < 65%**	64%
Other events in your life (birth, relocation, change of employment, etc.)	**2321**	**35% < f < 37%**	36%
Total	**6476**		

Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

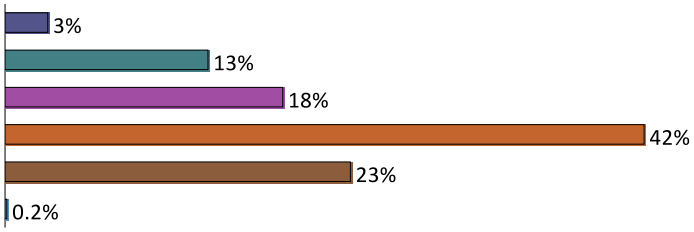
Users use private hire services on a regular basis: a third of them (34%) use them at least once a week and 42% use them one to three times per month. Only 23% use them less than once a month.

On average, users of these services make 4 journeys per month with these services. It is very likely that a mode of transport used on such a regular basis also has an impact on the mobility behavior of its users.

Figure 124: Frequency of use of private hire services

How often do you use ride-sourcing transport solutions (..., etc.)?

	Nbr	IC
Every day or almost	**190**	**3% < f < 3%**
2 to 3 times a week	**871**	**13% < f < 14%**
once a week	**1193**	**18% < f < 19%**
1 to 3 times a month	**2731**	**41% < f < 43%**
Less than once a month	**1481**	**22% < f < 24%**
Never	**10**	**<1% < f < 0.2%**
Total	**6476**	



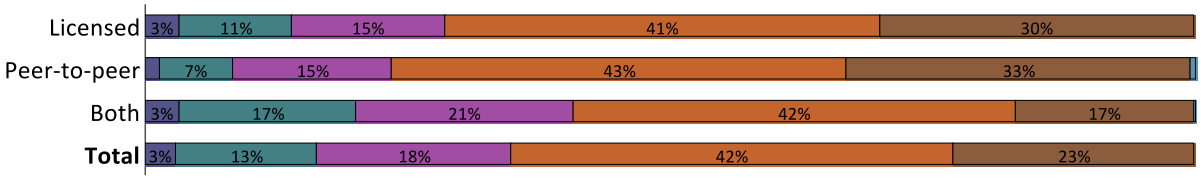
Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

20% of users who use the various types of private hire services use them several times per week (compared with 16% for the entire sample). These are very regular users because 83% of them use these services at least once a month (compared with 77% in general).

Figure 125: Frequency of use of private hire services depending on the type of service used

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Licensed	**39**	125	172	**487**	351	**1**	**1175**
Peer-to-peer	20	102	218	**624**	472	6	**1442**
Both	131	644	803	**1620**	658	**3**	**3859**
Total	**190**	**871**	**1193**	**2731**	**1481**	**10**	**6476**

p = **0.00** ; Khi2 = **277.83** ; dof = **10** (**VS**)

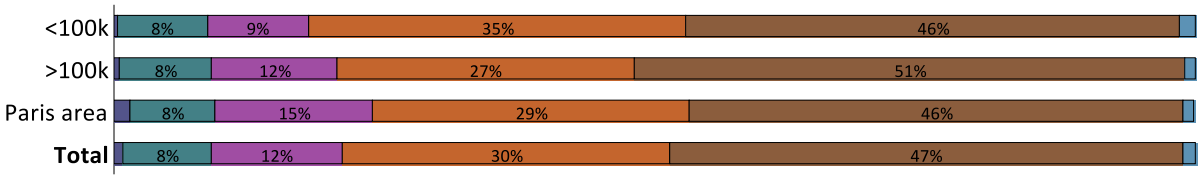


In contrast, **taxi users are much more occasional in their habits.** A little more than half (51%) use them at least once a month. Even if the proportion of **users who use taxis at least once a week (21% of the sample) is significant, it remains well below the proportion of the users of private hire services, who use them at least once a week (34%).**

Figure 126: Frequency of taxi use

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
<100k	1	24	27	100	131	4	287
>100k	2	29	40	94	174	3	342
Paris area	6	29	54	109	170	4	372
Total	**9**	**82**	**121**	**303**	**475**	**11**	**1001**

p = **0.30** ; Khi2 = **11.77** ; dof = **10** (**NS**)



Source: 6t-bureau de recherche, 2015, online survey of 1,001 taxi users in France

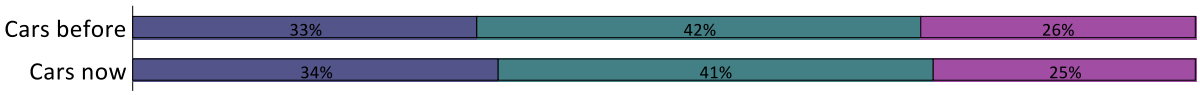
... and induce a slight but statistically significant decrease in motorization.

Before beginning to use Uber services, 33% of the respondents had no car in their household; at the present time, 34% do not possess one.

Figure 127: Distribution of Uber users depending on the number of cars owned in the household, before the use of private hire services ("before") and at the time of the survey ("now")

	None	1	2 or more	Total
Cars before	2105	2698	1673	6476
Cars now	2228	2655	1593	6476

p = **0.06** ; Khi2 = **5.80** ; dof = **2** (**LS**)



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Assuming that users who report that they possess "two or more cars" in their household all have two cars in their household, the average number of cars owned in the household of each respondent decreased from 0.93 to 0.90 following the use of private hire services, i.e. a

decrease of 3%. The change is therefore slight but statistically significant[29].

Figure 128: Average number of cars owned in the household of an Uber user before the use of private hire services ("before") and at the time of the survey ("now")

	Mean	Std deviation	Cars before
Cars before	**0.93**	**0.76**	
Cars now	**0.90**	**0.76**	**0.02**
Total	**0.92**	**0.76**	

Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

For users who currently possess one or more cars in their household and whose automobile ownership has not changed following the adoption of private hire services, we asked if they considered dispensing with their cars or one of the cars within the next twelve months due to these same services. **Among the users concerned by the question, 7% consider dispensing with a car during this period**.

[29] The test of statistical significance for the evolution of the average number of cars owned by the households is the calculation of a "p-value", indicated at the bottom right of the table ("0.02"). The p-value expresses the percentage of chance of obtaining a result at least as "extreme" as the one that is observed, by admitting that a "null hypothesis" is true. Here, the result is the variation of 0.93 to 0.90 of the average number of cars owned per household; the "null hypothesis" is that there is no correlation between the fact that the respondents use private hire services and the fact that the average number of cars owned in their household evolved. The p-value of 0.02 indicates that, considering that the null hypothesis is true, there is in reality a 2 % probability of observing a variation at least as great. We agree with the widespread opinion according to which a p-value under 0.05 indicates that there is a legitimate presumption against "the null hypothesis", we conclude that the observed variation of the average number of cars per household is significant, i.e. it expresses with sufficient probability the existence of a correlation between the use of private hire services and the evolution of the level of motorisation of households.

Figure 129: Proportion of Uber users that consider dispensing with a car within 12 months following the survey thanks to private hire services

Thanks to Transportation Network Services, do you plan to dispense with your car/one of your cars in the next 12 months?

	Nbr	IC
Yes	272	6% < f < 7%
No	3663	93% < f < 94%
Total	3935	

Source: 6t-bureau de recherche, 2015, sample of 3,935 respondents having already used Uber, possessing at least one car in their household and which possess the same number of cars in the household as when they began using private hire services

For users who stated that they do not intend to dispense with a car, we asked if, without private hire services, they would need to buy a car or an additional car. Only 3% of the users answered affirmatively.

Figure 130: Proportion of Uber users stating that private hire services enable them to avoid the purchase of a car

Without Transportation Network Services, do you think you should buy a car/an extra car?

	Nbr	IC
Yes	119	3% < f < 4%
No	3545	96% < f < 97%
Total	3664	

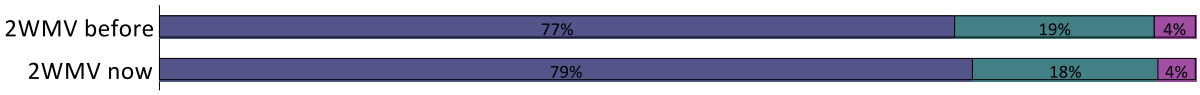
Source: 6t-bureau de recherche, 2015, sample of 3,935 respondents having already used Uber, possessing at least one car in their household, which possess the same number of cars in the household as when they began using private hire services and who do not consider dispensing with a car within the next 12 months thanks to the use of private hire services.

The evolution of the number of two-wheeled motor vehicles owned by households is also limited. Seventy-seven percent of the users did not possess a two-wheeled motor vehicle in their household before using private hire services; today they account for 79%.

Figure 131: Distribution of Uber users depending on the number of two-wheeled motor vehicles owned in the household, before the use of private hire services ("before") and at the time of the survey ("now")

	None	1	2 or more	Total
2WMV before	4980	1245	251	6476
2WMV now	5093	1154	229	6476

p = **0.06** ; Khi2 = **5.73** ; dof = **2** (**LS**)



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

As for the private car, the evolution of the average number of two-wheeled motor vehicles owned per household is low (0.27 to 0.25), but significant.

Figure 132: Average number of two-wheeled motor vehicles owned in the household of an Uber user before the use of private hire services ("before") and at the time of the survey ("now")

	Mean	Std deviation	2WMV before
2WMV before	**0.27**	**0.52**	
2WMV now	**0.25**	**0.51**	**0.02**
Total	**0.26**	**0.52**	

r = +**0.90** (**VS**) y = **0.87**x + **0.01**

Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Among the users who possess one or more two-wheeled motor vehicles and who possess the same number of vehicles as when they began using private hire services, 6% consider dispensing with one two-wheeled motor vehicle in the months to come thanks to these services.

Figure 133: Proportion of Uber users who consider dispensing with a two-wheeled motor vehicle within 12 months following the survey thanks to private hire services

Thanks to Transportation Network Services, do you plan to dispense with your motorized two-wheeled vehicle/one of your motorized two-wheeled vehicles in the next 12 months?

	Nbr	IC
Yes	70	5% < f < 6%
No	1202	94% < f < 95%
Total	1272	

Source: 6t-bureau de recherche, 2015, sample of 3,935 respondents having already used Uber, possessing at least one two-wheeled motor vehicle in their household and which possess the same number of two-wheeled motor vehicles in the household as when they began using private hire services

Among the users who responded negatively to the previous question, only 2% believe that without private hire services they would be forced to buy a two-wheeled motor vehicle or an extra two-wheeled motor vehicle.

Figure 134: Proportion of Uber users stating that private hire services enable them to avoid the purchase of a car

Without Transportation Network Services, do you think you should buy a motorized two-wheeled vehicle/an extra motorized two-wheeled vehicle?

	Nbr	IC
Yes	30	2% < f < 3%
No	1172	97% < f < 98%
Total	1202	

Source: 6t-bureau de recherche, 2015, sample of 1,202 respondents having already used Uber, possessing at least one two-wheeled motor vehicle in their household, who possess the same number of two-wheeled motor vehicles in the household as when they began using private hire services and who do not consider dispensing with a two-wheeled motor vehicle within the next 12 months thanks to the use of private hire services.

The ownership of motors vehicles by the households and the answers to the questions on their evolution do not vary considerably according to the service used nor according to the urban area of residence.

22,000 fewer cars in the Paris urban area thanks to private hire services

We wish to determine how many cars Uber has removed **from the Paris urban area**. In this same urban area, **the average number of cars in the household of each respondent was 0.74 before using private hire services; today this is 0.70, i.e. a decrease of 5.4% of the number of cars**

owned. This decrease is lower in percentage terms than that of the fleet of cars owned by Autolib' (-23%) and Communauto (-67%) users.

Figure 135: Evolution of the average number of cars owned in the household of each Uber user residing in the Paris urban area

	Mean	Std deviation	Cars before
Cars before	**0.74**	**0.73**	
Cars now	**0.70**	**0.73**	**0.02**
Total	**0.72**	**0.73**	

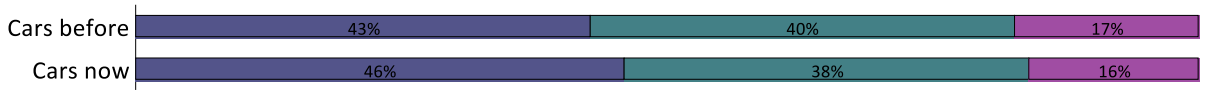
Source: 6t-bureau de recherche, 2015, sample of 2,738 respondents having already used Uber and residing in the Paris urban area.

Yet, **in absolute terms, due to the extent of its public, Uber has already removed more cars from the Ile-de-France region than Autolib' and Communauto combined.** Still assuming that the users who report that they possess "two or more cars" in their household all have two cars in their household, the number of cars owned by the users of the sample decreased from (1,091 + 473 * 2=) 2037 to (1 042 + 433 * 2 =) 1,908. The fleet of cars owned by the users of the sample has therefore decreased from (2,037 - 1,908 =) 129 cars.

Figure 136: Distribution of Uber users depending on the number of cars owned in the household, before the use of private hire services ("before") and at the time of the survey ("now")

	None	1	2 or more	Total
Cars before	1174	**1091**	**473**	**2738**
Cars now	1263	**1042**	**433**	**2738**

p = **0.05** ; Khi2 = **6.14** ; dof = **2** (**S**)



Source: 6t-bureau de recherche, 2015, sample of 2,738 respondents having already used Uber and residing in the Paris urban area.

The 621,171 Uber users who used the service at least once in the last twelve months and who subscribed in the Paris urban area[30] are approximately 227 times more numerous (= 621,171 / 2,738) than the users present in our sample and who also reside in the Paris urban area. By multiplying the 129 cars removed in our sub-sample of residents of the Paris urban area by 227, we can estimate that at the present time, Uber has already allowed its users residing in the Paris area to dispense with 29,283 personal cars (= 129 * 227).

In June 2015, 7,000 licensed drivers made at least one trip via Uber application in the Paris urban area. On the assumption of one vehicle purchased per licensed driver, these 7,000 vehicles purchased replace the 29,283 private cars which the users residing in the Paris urban area dispensed with (we do not take into account the 2,000 peer-to-peer drivers working with Uber that circulate in the Paris area because we assume that they would have purchased their car even if Uber had not existed). We can therefore deduce that **each car brought into circulation within the context of Uber services replaces approximately 4 private cars** (= 29,283 / 7,000).

In a previous study on Autolib' (6t, 2014), we estimated that each Autolib' car replaces 3 private cars. On 14 June 2015, Autolib' had 3,276 cars in service[31]. So we can estimate that at the present time, Autolib' has caused the removal of approximately 10,000 cars (= 3,276 * 3) in the Paris urban area, compared with approximately 22,000 (= 29,283 - 7,000) for Uber. In addition, the fleet of Autolib' cars is not likely to increase strongly (3,500 cars being the number of cars considered for the full maturity of the service), while Uber probably has a margin for development in the Paris urban area.

In this same study, we calculated that each Communauto return-trip car-sharing vehicle in the Ile-de-France region[32] replaces 7 private cars. However, because it remains relatively small, this service has replaced a little fewer than 800 private cars according to our calculations (6t, 2014).

Therefore, **Uber can be considered as the car-sharing service that has removed the most private cars from the Paris urban area.**

[30] Source: Uber on 10 July 2015.

[31] Source: Autolib' Metropole – url : https://drive.google.com/file/d/0B8MFxB5YvOOkS25odXdGeVNxNmc/view (consulted on 02/07/2015).

[32] The term "return-trip" qualifies car-sharing systems where the user must return the car to the station where it was picked up (unlike the Autolib' service, with which the user can leave the car in a station other than that of departure).

3.2 IMPACTS IN TERMS OF MOBILITY

The impacts in terms of mobility on the entire sample

In addition to their environmental impacts, do private hire services create mobility? How do they fit into the existing transport offer? Are they complementary to or competitive with other modes of transport?

Private hire services enable new destinations

If 64% of the respondents feel that their use of private hire services has changed their habits concerning the use of modes of transport, **40% say that thanks to private hire services, they are making journeys that they did not make before.** It therefore seems that private hire services create mobility which did not exist previously.

Figure 137: Proportion of users who report that they have been making new journeys since they began using private hire services

Would you say that since that you have been using these solutions you make journeys that you did not do before?

Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

This increase in mobility is even more marked for users who do not have a driving license. Fifty-three percent of these consider that they are now more mobile.

Figure 138: Proportion of users who report that they have been making new journeys since they began using private hire services, depending on whether or not they possess a driving license

Would you say that since that you have been using these solutions you make journeys that you did not do before?

	Yes	No	Total
With driving license	1867	3284	5151
Without driving license	701	624	1325
Total	**2568**	**3908**	**6476**

p = **<0.01** ; Khi2 = **122.24** ; dof = **1** (**VS**)

Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Among the users who stated that they have made new journeys since using private hire services, **89% indicate that they make all or part of these new journeys in the evening** and 34% state that they make all or part of these journeys during the day.

Figure 139: Temporal distribution of new journeys

At what time of day do you make these journeys? (multiple answers possible)

	Nbr	IC
During the day	**863**	**32% < f < 35%**
During the evening	**2283**	**88% < f < 90%**
Total	**2567**	

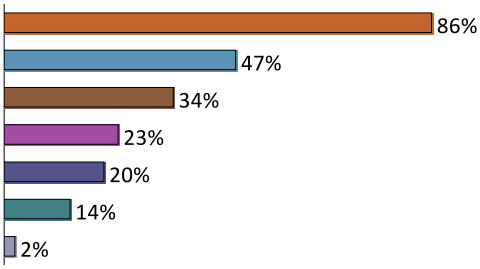
Source: 6t-bureau de recherche, 2015, sample of 2,567 respondents having already used Uber and reporting that they have been making new journeys since they began using private hire services

The new journeys consist especially of recreational outings (for 86% of the respondents to the question). Private hire services therefore create mobility linked to recreational outings at night and contribute to night-time economic activity.

Figure 140: Distribution by reason for new journeys

For what reason(s)? (multiple answers possible)

	Nbr	IC
Going out (restaurant, cinema, night club, etc.)	2214	85% < f < 87%
To or from a station/airport	1205	46% < f < 48%
For visits to the family, friends	882	33% < f < 36%
For business travel	595	22% < f < 24%
Journeys from home-work / studies	519	19% < f < 21%
For shopping or purchases	350	13% < f < 15%
Other	63	2% < f < 3%
Total	**2567**	



Source: 6t-bureau de recherche, 2015, sample of 2,567 respondents having already used Uber and reporting that they have been making new journeys since they began using private hire services

As a reminder, **users of private hire services make an average of 4 journeys per month with these services**. This is more than taxi users, who make an average of 2.5 journeys per month. Thirty-four percent of the users of private hire services make at least one journey per week, whereas only 21% of taxi users use taxis at least once a week.

Private hire services fill a gap in the demand for transport, especially at night

When we invited users to describe their most recent journey with Uber, we also asked them if they thought they would have been able to make this same journey with another mode of transport. **Over a quarter of them (27%) believed that they would not been able to do it with another mode than Uber. Therefore, if Uber had not existed, in all likelihood they would not have made the journey. Thus, Uber indeed appears to be a service that creates mobility.**

Figure 141: Proportion of users who feel that they could have used another mode than Uber to carry out their most recent journey

Could you have used another means of transport than ...?

	Nbr	IC
Yes	4422	72% < f < 74%
No	1624	26% < f < 28%
Total	**6046**	

Source: 6t-bureau de recherche, 2015, sample of 6,046 respondents having already used Uber, residing in one of the urban areas studied and having made their most recent journey with Uber in the urban area where they reside.

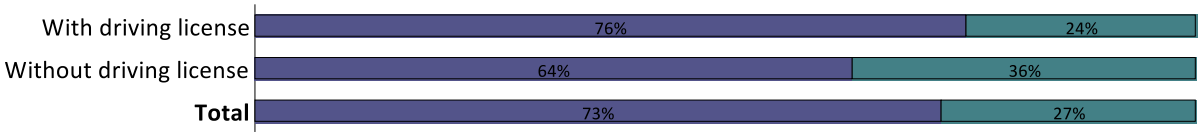
The proportion of users who could not have made their most recent journey without private hire services is even more pronounced among users who do not have a driving license. Thus, more

than a third (36%) say they could not have made their most recent journey without private hire services.

Figure 142: Proportion of users who feel that they could have used another mode than Uber to carry out their most recent journey, depending on whether or not they possess a driving license

	Yes	No	Total
With driving license	3630	1170	4800
Without driving license	792	454	1246
Total	**4422**	**1624**	**6046**

p = **<0.01** ; Khi2 = **73.25** ; dof = **1** (**VS**)



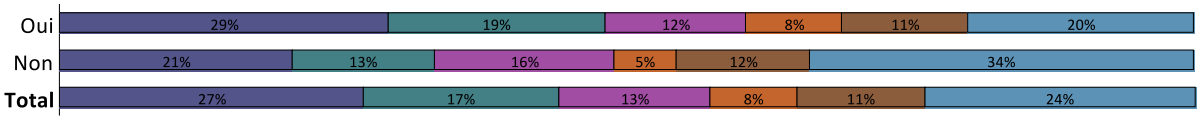
Source: 6t-bureau de recherche, 2015, sample of 6,046 respondents having already used Uber, residing in one of the urban areas studied and having made their most recent journey with Uber in the urban area where they reside.

Users who feel that they could not have used another mode of transport are above all those users who made their most recent journey with Uber at night during the weekend (34%, compared with 20% of the users who could have used another mode of transport) or at night during the week (16% compared with 12% of users who could have used another mode of transport). Therefore, a complementarity exists between Uber and public transport: for some users the first becomes the only mode of transport available when the latter service is not available.

Figure 143: Proportion of users who feel that they could have used another mode than Uber to carry out their most recent journey with Uber, by time of day of this last journey

	En semaine, entre 8h et 20h	En semaine, entre 20h et minuit	En semaine, entre minuit et 8h	Le week-end, entre 8h et 20h	Le week-end, entre 20h et minuit	Le week-end, entre minuit et 8h	Total
Oui	1286	845	546	368	494	883	4422
Non	333	204	257	88	192	550	1624
Total	**1619**	**1049**	**803**	**456**	**686**	**1433**	**6046**

p = **<0,1** ; Khi2 = **183,3** ; ddl = **5** (**TS**)



Source: 6t-bureau de recherche, 2015, sample of 6,046 respondents having already used Uber, residing in one of the urban areas studied and having made their most recent journey with Uber in the urban area where they reside.

In contrast, the proportion of users who made a journey in relation with peripheral zones is not higher among those who say that they could not have used another mode of transport. **Private hire services appear to fill a lack of alternatives more from a temporal than spatial point of view, which does not mean that the service does not contribute to the improvement of access to certain peripheral zones.**

Figure 144: Proportion of users who feel that they could have used another mode than Uber to carry out their most recent journey with Uber, by pick-up and drop-off points for that journey

	Core city-->Core city	Core city-->Periphery	Periphery-->Core city	Periphery-->Periphery	Total
Yes	**2515**	**1000**	**572**	**335**	**4422**
No	**878**	**393**	**197**	**156**	**1624**
Total	**3393**	**1393**	**769**	**491**	**6046**

p = **0.02** ; Khi2 = **9.60** ; dof = **3** (**S**)

Source: 6t-bureau de recherche, 2015, sample of 6,046 respondents having already used Uber, residing in one of the urban areas studied and having made their most recent journey with Uber in the urban area where they reside.

When private hire services are not available, public transport and taxi options are the main alternatives ...

39% of the users who declare that they could have used another mode during their most recent journey with Uber could have used a taxi, and 40% could have used public transport. Private hire services seem to be entering into a relationship of complementarity with public transport when the latter do not circulate or when the service is limited, but may also enter into a competitive relationship with them.

Figure 145: Distribution of users by the mode which could have been used instead of Uber for the most recent journey made with Uber

If yes, what means of transportation would you have taken? (only one answer possible)

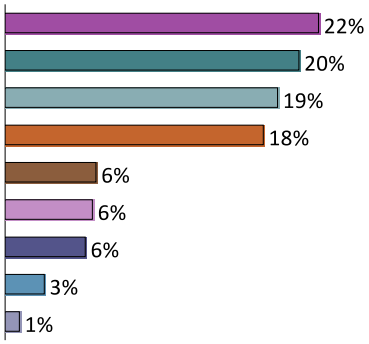
	Nbr	IC
public transportation	1773	39% < f < 41%
a taxi	1717	38% < f < 40%
a personal car	272	6% < f < 7%
on foot	206	4% < f < 5%
a bicycle (personal or self service)	184	4% < f < 5%
a different ride-sourcing solution	169	3% < f < 4%
a motorcycle, a scooter	46	0.8% < f < 1%
a self-service car (Autolib)	35	0.6% < f < 1%
Other	20	0.3% < f < 0.6%
Total	**4422**	

Source: 6t-bureau de recherche, 2015, sample of 4,422 respondents having already used Uber, residing in one of the urban areas studied, having made their most recent journey with Uber in the urban area where they reside and who consider that they could have used another mode of transport than Uber for that journey

When a mode other than Uber could have been used, the main advantage of Uber over this other mode is usually that it is faster (22% of the responses), more comfortable (20%), less expensive (19%) or proposes a better quality of service (18%).

Figure 146: Advantage of Uber over the other mode which could have been used instead of Uber for the most recent journey made with Uber

	Nbr	IC
It was faster	953	21% < f < 22%
It was more comfortable	895	19% < f < 21%
It was cheaper	829	18% < f < 20%
Better quality service	788	17% < f < 19%
Available nearby	279	6% < f < 7%
Other	270	6% < f < 7%
It was safer (aggression, robbery, etc.)	244	5% < f < 6%
It allowed me to be more sure of my travel time	120	2% < f < 3%
It allowed me to get to my destination without getting lost	44	0.8% < f < 1%
Total	**4422**	



Source: 6t-bureau de recherche, 2015, sample of 4,422 respondents having already used Uber, residing in one of the urban areas studied, having made their most recent journey with Uber in the urban area where they reside and who consider that they could have used another mode of transport than Uber for that journey

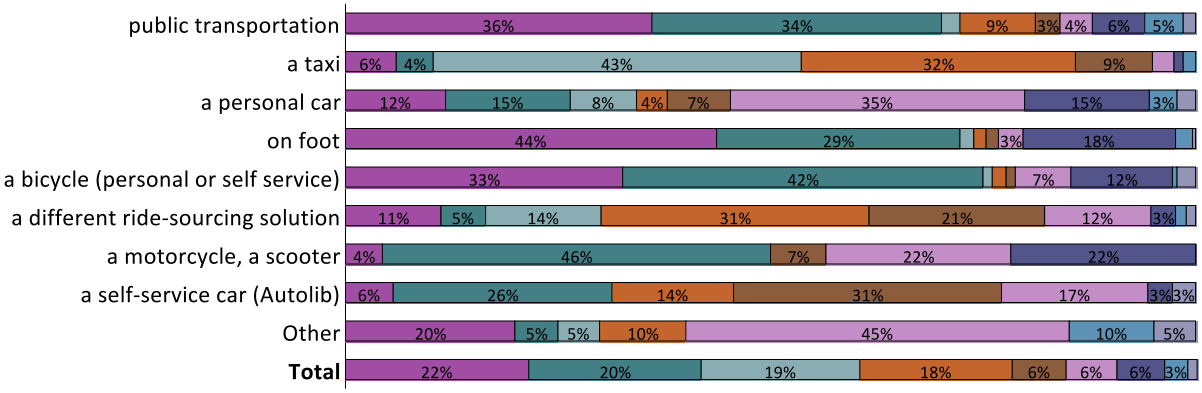
The advantage of Uber in terms of speed is clear mainly in relation to public transport (36% of users who could have taken public transport used Uber primarily because it was faster), walking

(44%) and cycling (33%). Uber is also preferred to these modes for its comfort: 34% of users who could have used public transport preferred Uber for comfort; the same is true for the 29%of users who could have walked and the 42% of users who could have ridden a bicycle.

Figure 147: Advantage of Uber over the other mode which could have be used instead of Uber for the most recent journey made with Uber, by mode of transport

	It was faster	It was more comfortable	It was cheaper	Better quality service	Available nearby	Other	It was safer (aggression, robbery, etc.)	It allowed me to be more sure of my travel time	It allowed me to get to my destination without getting lost	Total
public transportation	639	604	38	158	49	69	110	80	26	1773
a taxi	105	74	741	554	156	43	19	22	3	1717
a personal car	32	40	21	10	20	94	40	9	6	272
on foot	90	59	3	3	3	6	37	4	1	206
a bicycle (personal or self service)	60	78	2	3	2	12	22	1	4	184
a different ride-sourcing solution	19	9	23	53	35	21	5	2	2	169
a motorcycle, a scooter	2	21	0	0	3	10	10	0	0	46
a self-service car (Autolib)	2	9	0	5	11	6	1	0	1	35
Other	4	1	1	2	0	9	0	2	1	20
Total	953	895	829	788	279	270	244	120	44	4422

p = **<0.01** ; Khi2 = **3166.81** ; dof = **64** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 4,422 respondents having already used Uber, residing in one of the urban areas studied, having made their most recent journey with Uber in the urban area where they reside and who consider that they could have used another mode of transport than Uber for that journey

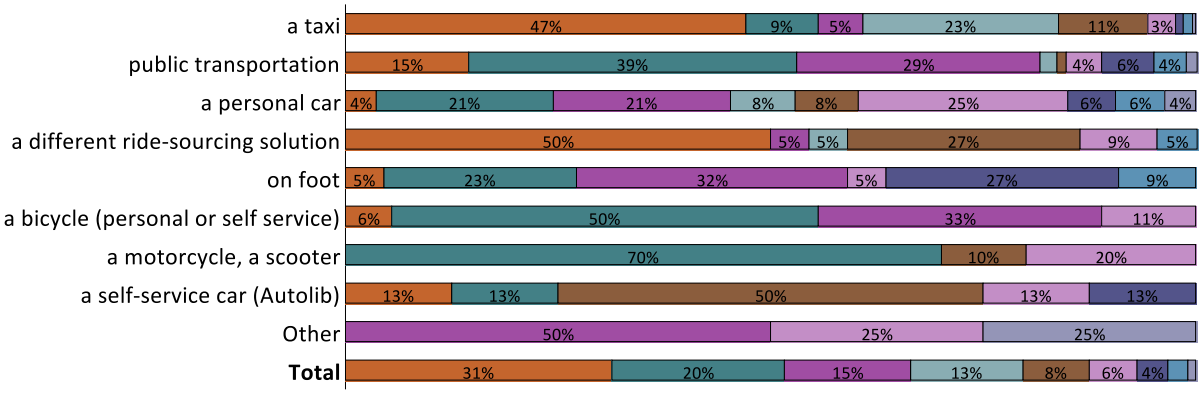
For the users of licensed transportation services, the quality of service and comfort predominate. Thus, 47% of the users who could have used taxis preferred licensed transportation services for the quality of service and 39% who could have used public transport chose Uber for comfort.

Figure 148: Advantage of Uber licensed transportation services over the other mode which could have be used instead of Uber for the most recent journey made with Uber licensed transportation services, by mode of transport

[Type chauffeur] Parmi "Licensed"

	Better quality service	It was more comfortable	It was faster	It was cheaper	Available nearby	Other	It was safer (aggression, robbery, etc.)	It allowed me to be more sure of my travel time	It allowed me to get to my destination without getting lost	Total
a taxi	214	39	24	104	48	15	4	5	2	455
public transportation	38	101	75	5	3	11	16	10	3	262
a personal car	2	11	11	4	4	13	3	3	2	53
a different ride-sourcing solution	11	0	1	1	6	2	0	1	0	22
on foot	1	5	7	0	0	1	6	2	0	22
a bicycle (personal or self service)	1	9	6	0	0	2	0	0	0	18
a motorcycle, a scooter	0	7	0	0	1	2	0	0	0	10
a self-service car (Autolib)	1	1	0	0	4	1	1	0	0	8
Other	0	0	2	0	0	1	0	0	1	4
Total	**268**	**173**	**126**	**114**	**66**	**48**	**30**	**21**	**8**	**854**

p = **<0.01** ; Khi2 = **532.88** ; dof = **64** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 854 respondents having already used Uber licensed transportation services, residing in one of the urban areas studied, having made their most recent journey with Uber in the urban area where they reside and who consider that they could have used another mode of transport than Uber for that journey.

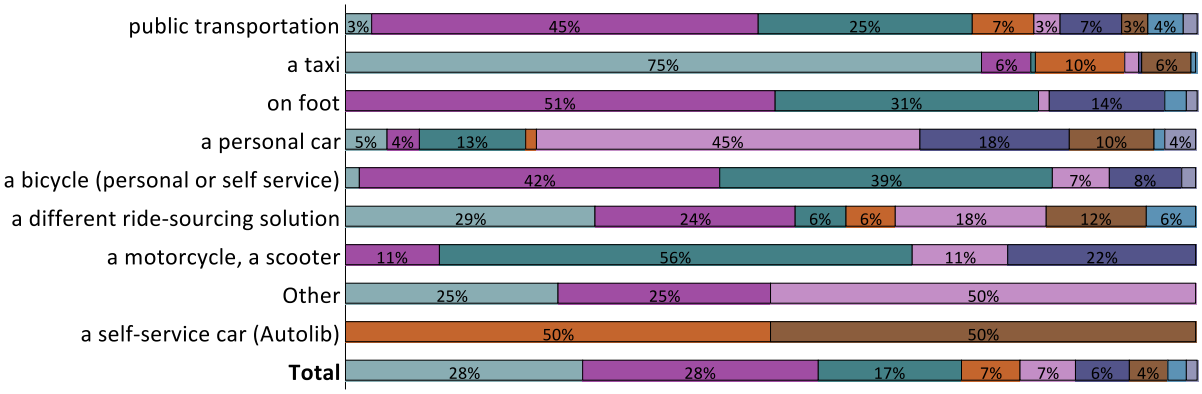
For the users of peer-to-peer transportation services, it is cost and speed that give Uber the advantage over the other modes. Seventy-five percent of the users of peer-to-peer transportation services who could have taken a taxi preferred Uber because it was less expensive and 45% who could have used public transport preferred to use Uber because it was faster.

Figure 149: Advantage of Uber peer-to-peer transportation services over the other mode which could have be used instead of Uber for the most recent journey made with Uber peer-to-peer transportation services, by mode of transport

[Type chauffeur] Parmi "Peer-to-peer"

	It was cheaper	It was faster	It was more comfor table	Better quality service	Other	It was safer (aggre ssion, robb ery, etc.)	Avail able nearby	It allowed me to be more sure of my travel time	It allowed me to get to my destin ation without getting lost	Total
public transportation	12	169	94	27	11	27	12	15	6	373
a taxi	242	19	2	34	5	1	19	2	0	324
on foot	0	41	25	0	1	11	0	2	1	81
a personal car	4	3	10	1	36	14	8	1	3	80
a bicycle (personal or self service)	1	25	23	0	4	5	0	0	1	59
a different ride-sourcing solution	5	4	1	1	3	0	2	1	0	17
a motorcycle, a scooter	0	1	5	0	1	2	0	0	0	9
Other	1	1	0	0	2	0	0	0	0	4
a self-service car (Autolib)	0	0	0	1	0	0	1	0	0	2
Total	**265**	**263**	**160**	**64**	**63**	**60**	**42**	**21**	**11**	**949**

p = **<0.01** ; Khi2 = **967.83** ; dof = **64** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 949 respondents having already used Uber peer-to-peer transportation services, residing in one of the urban areas studied, having made their most recent journey with Uber in the urban area where they reside and who consider that they could have used another mode of transport than Uber for that journey.

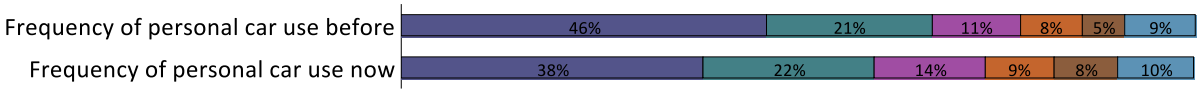
.. but entail a decrease in the use of all modes of transport

Private hire services do not lead their users to decrease their ownership of cars and two-wheeled motor vehicles, but induce those who possess them to use them less. Thus, of users who possessed at least one car prior to using these services and who still possess one today, 46% used a car daily or almost; their proportion is only 38% today.

Figure 150: Frequency of use of private cars by Uber users before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Frequency of personal car use before	1896	868	450	323	220	363	4120
Frequency of personal car use now	1572	888	576	360	323	401	4120

p = **<0.01** ; Khi2 = **69.40** ; dof = **5** (**VS**)



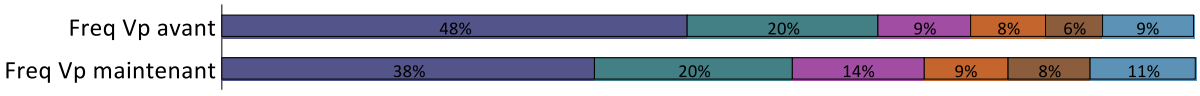
Source: 6t-bureau de recherche, 2015, sample of 4,120 respondents having already used Uber, who possessed at least one car in their household before using private hire services and possessing at least one car in their household at the time of the survey

However, this evolution may be due to factors other than the use of private hire services. Therefore, we examined **the evolution of the frequency of use of private cars by the users who stated that their "changes of habits in the use of transport are mainly due to private hire services". However, 48% of these users used a private car every day or nearly every day. At present, these users represent only 36%.** It is therefore possible to attribute the substantial decrease in the frequency of use of private cars to private hire services.

Figure 151: Frequency of use of private cars by Uber users who consider that private hire services are the main factor of the evolution of their mobility behavior, before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Freq Vp avant	1249	515	245	205	152	245	2611
Freq Vp maintenant	1002	531	355	225	220	278	2611

p = **<0.01** ; Khi2 = **62.96** ; dof = **5** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 2,611 respondents having already used Uber, who possessed at least one car in their household before using private hire services, possessing at least one car in their household at the time of the survey and who consider that private hire services are the main factor in the evolution of their mobility behavior.

We also observe **a significant decrease in the frequency of use of two-wheeled motor vehicles**: among users who possessed at least one two-wheeled motor vehicle before using private hire services and who still possess one, 37% previously used a two-wheeled motor vehicle every

day; only 31% use them with this frequency today.

Figure 152: Frequency of use of two-wheeled motor vehicles by Uber users before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Frequency motorised two-wheeled vehicle use before	479	226	124	105	123	253	1310
Frequency of motorised two-wheeled vehicle use now	404	223	122	116	143	302	1310

p = **0.03** ; Khi2 = **12.78** ; dof = **5** (**S**)

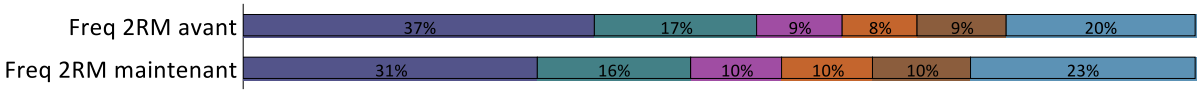
Source: 6t-bureau de recherche, 2015, sample of 1,310 respondents having already used Uber, who possessed at least one two-wheeled motor vehicle in their household before using private hire services and possessing at least one two-wheeled motor vehicle in their household at the time of the survey

For the users possessing a two-wheeled motor vehicle and who state that "their changes of habits in the use of transport are mainly due to the use of private hire services", a similar change is observed.

Figure 153: Frequency of use of two-wheeled motor vehicle by Uber users who consider that private hire services are the main factor of the evolution of their mobility behavior, before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Freq 2RM avant	302	139	72	65	76	161	815
Freq 2RM maintenant	253	131	78	78	84	191	815

p = **0.11** ; Khi2 = **8.94** ; dof = **5** (**LS**)



Source: 6t-bureau de recherche, 2015, sample of 815 respondents having already used Uber, who possessed at least one two-wheeled motor vehicle in their household before using private hire services, possessing at least one two-wheeled motor vehicle in their household at the time of the survey and who consider that private hire services are the main factor in the evolution of their mobility behavior.

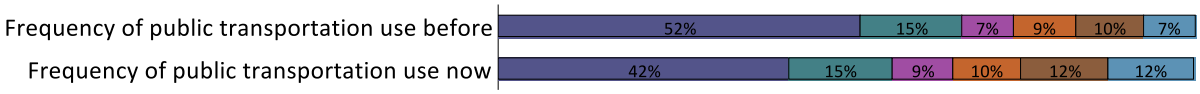
We observe a decrease in the frequency of use of all the other modes of urban transport. This decrease is rather slight, except for public transport and taxis.

The proportion of users who use public transport (underground, tram, bus, RER, Transilien) on a daily basis has decreased from 52% to 42%. The proportion of users who never use public transport or who use it less than once a month has increased from 17 to 24%.

Figure 154: Frequency of use of public transport (underground, tram, bus, RER, Transilien) by Uber users before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Frequency of public transportation use before	3371	941	482	584	625	473	6476
Frequency of public transportation use now	2715	957	560	634	807	803	6476

p = **<0.01** ; Khi2 = **187.21** ; dof = **5** (**VS**)

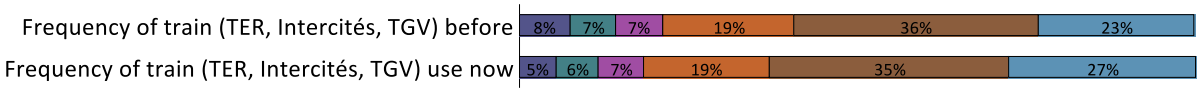


Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Figure 155: Frequency of use of the train (TER, intercity, TGV) by Uber users before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Frequency of train (TER, Intercités, TGV) before	487	442	455	1249	2352	1491	6476
Frequency of train (TER, Intercités, TGV) use now	355	406	432	1211	2295	1777	6476

p = **<0.01** ; Khi2 = **49.13** ; dof = **5** (**VS**)

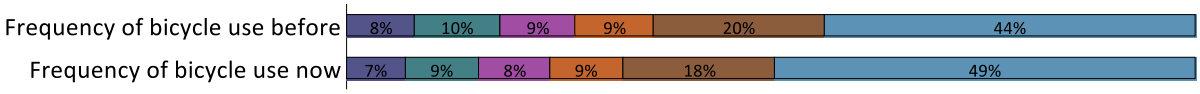


Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Figure 156: Frequency of use of bicycles by Uber users before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Frequency of bicycle use before	519	663	561	606	1298	2829	6476
Frequency of bicycle use now	451	569	532	559	1164	3201	6476

p = **<0.01** ; Khi2 = **44.85** ; dof = **5** (**VS**)

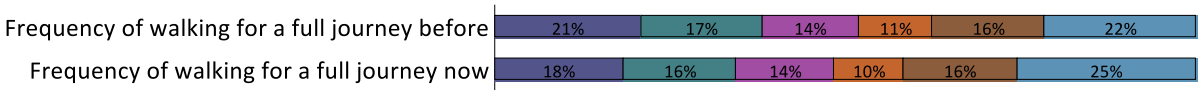


Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Figure 157: Frequency of making a complete journey on foot by Uber users before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Frequency of walking for a full journey before	1367	1112	885	689	1029	1394	6476
Frequency of walking for a full journey now	1189	1047	899	646	1058	1637	6476

p = **<0.01** ; Khi2 = **35.73** ; dof = **5** (**VS**)

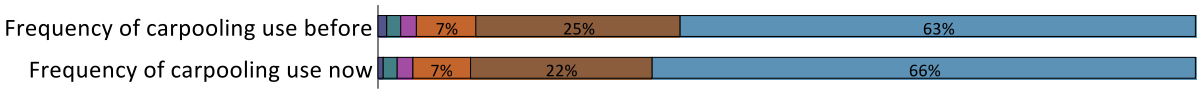


Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

Figure 158: Frequency of the use of carpooling by Uber users before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Frequency of carpooling use before	79	104	128	475	1618	4072	6476
Frequency of carpooling use now	53	109	122	461	1440	4291	6476

p = **<0.01** ; Khi2 = **21.69** ; dof = **5** (**VS**)

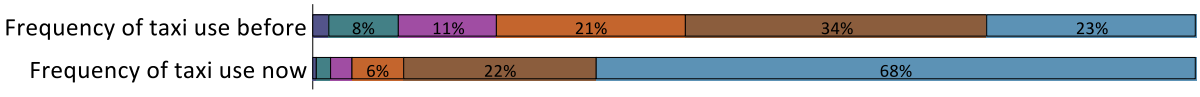


Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

The taxi appears as the mode whose frequency of use decreases the most strongly following the adoption of private hire services. The proportion of users who use taxis at least once a month has divided by two, decreasing from 43 to 20%. It must be remembered that more than half of the users of private hire services did not use or rarely used taxis before the arrival of these services.

Figure 159: Frequency of taxi use by Uber users before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Frequency of taxi use before	123	509	718	1387	2220	1519	6476
Frequency of taxi use now	37	105	153	375	1421	4385	6476

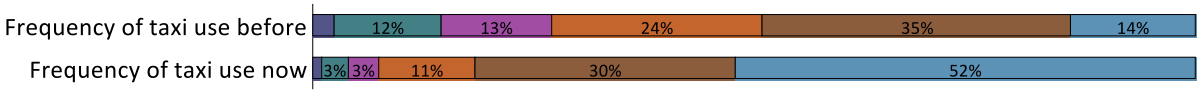


Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

The users of licensed transportation services are those for whom the reduction of taxi use is the most spectacular: the proportion who never use taxis has almost quadrupled following their adoption of these services (14 to 56%).

Figure 160: Frequency of taxi use by Uber users who only use licensed transportation services, before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Frequency of taxi use before	29	143	148	279	410	166	1175
Frequency of taxi use now	12	36	41	128	347	611	1175

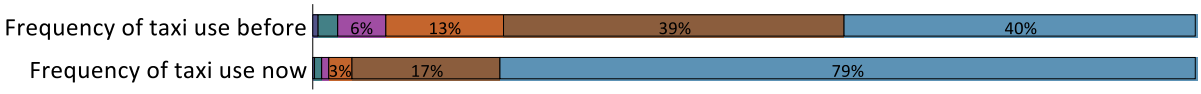


Source: 6t-bureau de recherche, 2015, sample of 1,175 respondents having already used Uber and using only licensed transportation services.

Users of peer-to-peer transportation services had little tendency to use taxis before: only 21% of them used them at least once a month. **Therefore, users of peer-to-peer transportation services were not significant taxi users.** However, the trend is significant: the proportion of them who have never used a taxi again since they adopted peer-to-peer transportation services has doubled, increasing from 40 to 79%.

Figure 161: Frequency of taxi use by Uber users who only use peer-to-peer transportation services, before the use of private hire services ("before") and at the time of the survey ("now")

	Every day or almost	2 to 3 times a week	once a week	1 to 3 times a month	Less than once a month	Never	Total
Frequency of taxi use before	9	32	81	191	557	572	1442
Frequency of taxi use now	4	12	11	38	242	1135	1442



Source: 6t-bureau de recherche, 2015, sample of 1,142 respondents having already used Uber and using only peer-to-peer transportation services.

With the exception of the frequency of taxi use, the frequency of use of the different modes of transportation has evolved in a similar manner, regardless of the type of service used or the urban area considered.

Uber users use cars less than Autolib' users

The knowledge of the frequency of use of the different modes of transport by Uber users, but also of other car-sharing services (Autolib' single-trip car-sharing service and the Communauto return-trip service in the Ile-de-France region) enables us to estimate and compare the average use made of these different modes by these various users over a one-month period.

To do this, we have prepared an estimate of the monthly usage of the different modes calculated on the basis of the frequency of use that the users had the possibility to indicate. The table below summarizes the estimates adopted:

Figure 162: Estimate of monthly usage depending on the frequency of use

Frequency of use	Estimate of monthly use
Every day or almost	22.5 (i.e. 5 uses * 4.5 weeks)
2 to 3 times a week At least once a week*	11.25 (i.e. 2.5 uses * 4.5 weeks)
1 time a week	4.5 (i.e. 1 use * 4.5 weeks)
1 to 3 times a month	2
Less than once a month Only once **	0.25
Never	0

* Modality proposed to users of Autolib' and Communauto only for taxi use

** Modality proposed to users of Autolib' for the frequency of use of Autolib' and to the users of Communauto for the frequency of use of Communauto.

The table below presents the average number of uses made of the different modes of transport by the users of Uber, Autolib' and Communauto in the Ile-de-France region, before and after the adoption of these various car-sharing services. The effects of Uber on mobility behavior are similar to those of Autolib'. All modes of transport see their use decrease following the adoption of these two car-sharing services. For both Uber and Autolib' users, the use of private cars (a decline in the use of this mode of 18 and 48%, respectively) and taxis (a decrease of 74 and 52%, respectively) diminish the most. Nevertheless, Uber users distinguish themselves from the users of Autolib' in that on average they use cars less often, all forms combined (private and shared): the first have used cars on average 9.7 times per month since their adoption of Uber, while the latter have used them on average 13.6 times per month since their adoption of Autolib'. This is explained by the fact that unlike Uber, Autolib' is a frequently used mode, which very largely compensates the decrease observed in the use of the private car. While Autolib' is

habitual for its users, Uber remains an occasional mode of transport.

Figure 163: Evolution of the monthly usage of modes of transport by type of shared car service in the Ile-de-France region (comparison between Uber, Autolib' and Communauto)

	Private hire service in Ile-de-France (IdF) (Uber)		Single-trip car-sharing in IdF (Autolib')		Return-trip car-sharing in IdF (Communauto)	
	No. of uses before	**No. of uses after**	**No. of uses before**	**No. of uses after**	**No. of uses before**	**No. of uses after**
Private car	6,1	5,0	4,8	2,5	3,5	0,5
Public transport	16,4	14,5	16,1	14,1	16,7	17,0
Bicycle/VLS	3,3	2,9	4,4	3,7	6,4	6,8
On foot	7,0	6,9	9,4	9,0	11,5	11,9
Two-wheeled motor vehicles	2,5	2,2	2,5	2,2	2,2	2,2
Taxi	3,4	0,8	3,1	1,5	1,5	1,4
Shared car	/	4,9	/	9,6	/	1,6
Total car use	9,5	10,7	7,9	13,6	5,0	3,5

Source: 6t-bureau de recherche, 2015, sample of 1,442 respondents having already used Uber; 6t-bureau de recherche, 2014, sample of 978 users having already used Autolib' or Communauto

The impacts in terms of mobility by type of service used

This section aims to determine the extent to which private hire services lead to a more or less important creation of mobility depending on the service used.

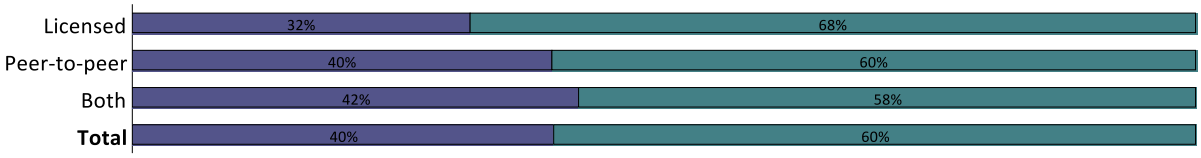
Peer-to-peer transportation services are especially effective for the creation of mobility

The users of licensed transportation services have the least tendency to consider that these services allow them to make journeys that they did not make before (32%, compared with 40% of the total sample). On the other hand, users who use both types of service are those who most often consider that they make journeys that they did not make before (42%).

Figure 164: Proportion of users who consider that they have been making new journeys since they began using private hire services, by service used

	Yes	No	Total
Licensed	374	801	1175
Peer-to-peer	570	872	1442
Both	1624	2235	3859
Total	**2568**	**3908**	**6476**

p = **<0.01** ; Khi2 = **39.59** ; dof = **2** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 6,476 respondents having already used Uber.

.. and are contributing the most strongly to night-time economic activity

Users of licensed transportation services are more likely than others to make new journeys during the day (46% of them, compared with 25% of the users of peer-to-peer transportation services). Users who only use peer-to-peer transportation services and those who use both types of service have **a stronger tendency to make new journeys in the evening** (91 and 90%, respectively, compared with 82% of the users of licensed transportation services).

Figure 165: Temporal distribution of new journeys

	During the day		During the evening		Total	
	N	% obs.	N	% obs.	N	% obs.
Licensed	171	46%	307	82%	374	
Peer-to-peer	143	25%	519	91%	570	
Both	549	34%	1457	90%	1623	
Total	**863**	**34%**	**2283**	**89%**	**2567**	

p = **<0.01** ; Khi2 = **28.02** ; dof = **2** (**VS**)

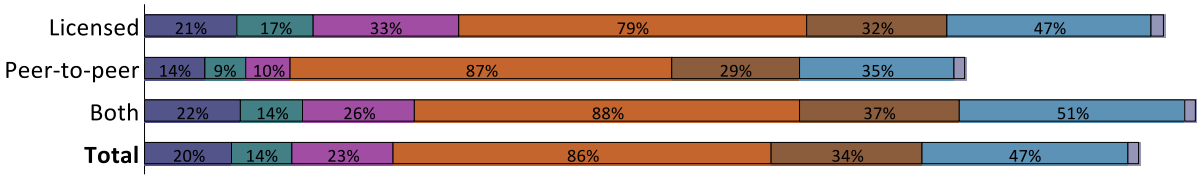
Source: 6t-bureau de recherche, 2015, sample of 2,567 respondents having already used Uber and reporting that they have been making new journeys since they began using private hire services

Users of licensed transportation services are particularly numerous to make new journeys for shopping (17% compared with 9% of peer-to-peer transportation services) **and business travel** (33% compared with 10% of the users of peer-to-peer transportation services), but they are the least likely to make new journeys for recreational outings (79%, compared with 87% of the users of peer-to-peer transportation services).

Figure 166: Distribution by reason for new journeys

	Journeys from home-work / studies	For shopping or purchases	For business travel	Going out (restaurant, cinema, night club, etc.)	For visits to the family, friends	To or from a station/ airport	Other
Licensed	**21%**	**17%**	**33%**	**79%**	**32%**	**47%**	**3%**
Peer-to-peer	**14%**	**9%**	**10%**	**87%**	**29%**	**35%**	**3%**
Both	**22%**	**14%**	**26%**	**88%**	**37%**	**51%**	**2%**
Total	**20%**	**14%**	**23%**	**86%**	**34%**	**47%**	**2%**

p = **<0.01** ; Khi2 = **79.01** ; dof = **12** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 2,567 respondents having already used Uber and reporting that they have been making new journeys since they began using private hire services

Concerning their most recent journey with Uber, **the users of peer-to-peer transportation**

services have the greatest tendency to consider that they could not have made that journey with another mode of transport (32%, compared with 19% of users of licensed driver options).

Figure 167: Proportion of users who feel that they could have used another mode than Uber to carry out their most recent journey with Uber, by service used

	No	Yes	Total
Licensed	202	854	1056
Peer-to-peer	455	949	1404
Both	967	2619	3586
Total	**1624**	**4422**	**6046**

p = **<0.01** ; Khi2 = **54.14** ; dof = **2** (**VS**)

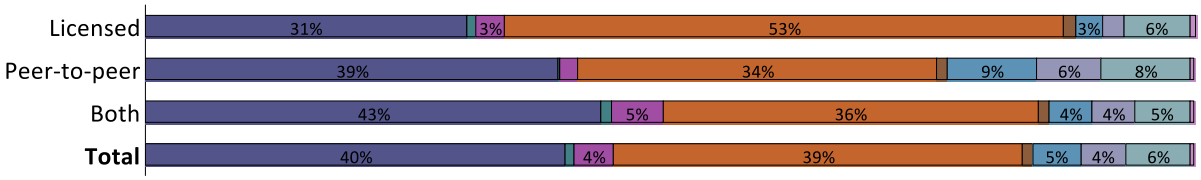
Source: 6t-bureau de recherche, 2015, sample of 6,046 respondents having already used Uber, residing in one of the urban areas studied and having made their most recent journey with Uber in the urban area where they reside.

The modes that could have been used instead of Uber for this most recent journey are instructive with regard to the competitive relationship between the different services and the rest of the transport offer. Thus, **53% of the users of licensed transportation services would have taken a taxi instead**, compared with only 34% of the users of peer-to-peer transportation services and 36% of the users of both types of service. Private hire services reaccustom users to using taxis. **Users of both types of service would have been more numerous to take public transport** (43% compared with 31% of the users of licensed transportation services). **Among the solutions that users of peer-to-peer transportation services would have chosen, walking (chosen by 9% compared with 3% of the users of licensed transportation services), the bicycle (6% compared with 1%), and the private car (8% compared with 6%) are overrepresented**.

Figure 168: Mode of transport that would have been used instead of Uber for the most recent journey made with Uber, by service used

	public transportation	a self-service car (Autolib)	a different ride-sourcing solution	a taxi	a motorcycle, a scooter	on foot	a bicycle (personal or self service)	a personal car	Other	Total
Licensed	262	8	22	455	10	22	18	53	4	854
Peer-to-peer	373	2	17	324	9	81	59	80	4	949
Both	1138	25	130	938	27	103	107	139	12	2619
Total	1773	35	169	1717	46	206	184	272	20	4422

p = **0.00** ; Khi2 = **182.75** ; dof = **16** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 4,422 respondents having already used Uber, residing in one of the urban areas studied, having made their most recent journey with Uber in the urban area where they reside and who consider that they could have used another mode of transport than Uber for that journey.

Impacts in terms of mobility by urban area of residence

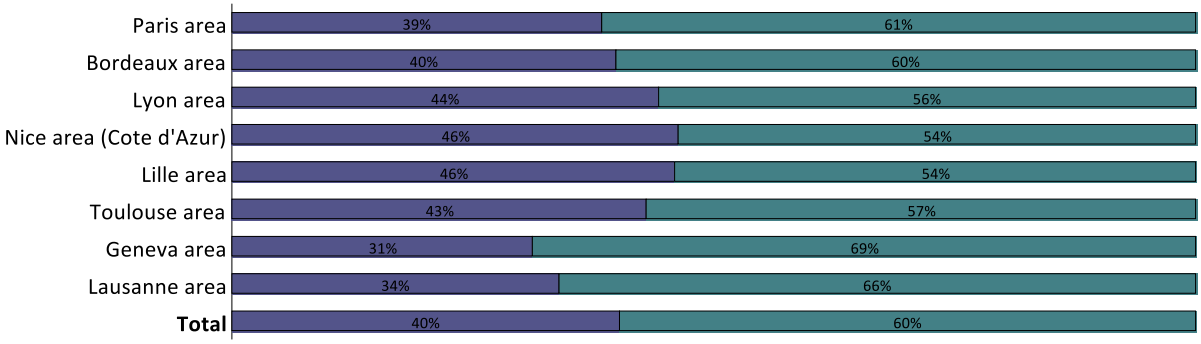
This section aims to determine to what extent private hire services create more or less mobility according to the urban area of residence.

Within the Lyon, Lille and Côte d'Azur urban areas, respondents who consider that these services allow them to make new journeys are overrepresented (44, 46 and 46%, respectively), while they are underrepresented in the Geneva and Lausanne urban areas (31 and 34%, respectively). **It seems that these services respond to a substantial latent demand on the part of users of certain French urban areas other than Paris, while this latent demand is less strong in the Swiss urban areas.**

Figure 169: Proportion of users who consider that they have been making new journeys since they began using private hire services, by urban area of residence

	Yes	No	Total
Paris area	971	1551	2522
Bordeaux area	170	255	425
Lyon area	268	337	605
Nice area (Cote d'Azur)	212	244	456
Lille area	258	303	561
Toulouse area	215	283	498
Geneva area	103	227	330
Lausanne area	119	231	350
Total	**2316**	**3431**	**5747**

p = **<0.01** ; Khi2 = **41.05** ; dof = **7** (**VS**)



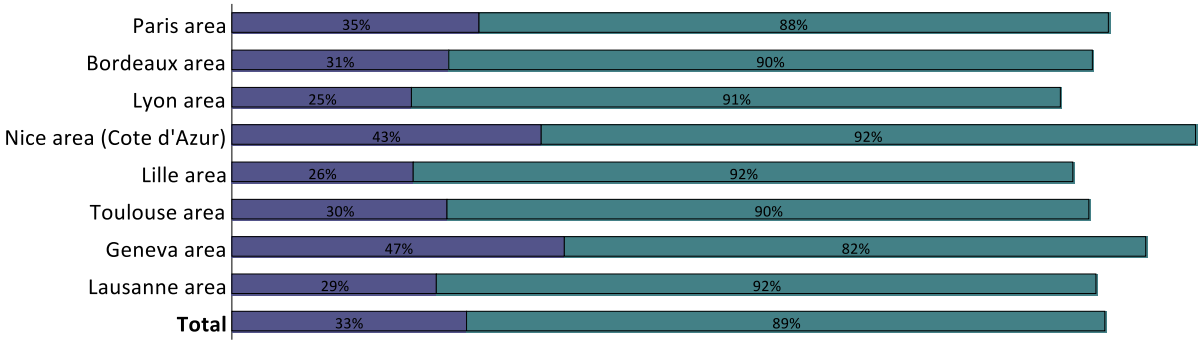
Source: 6t-bureau de recherche, 2015, sample of 5,747 respondents having already used Uber, reporting that they have been making new journeys since they began using private hire services and residing in one of the urban areas studied

In the Nice and Geneva urban areas, users who consider that they make new journeys during the day are overrepresented (43% and 47%, respectively, compared with 33% in the total sample).

Figure 170: Temporal distribution of new journeys, by urban area of residence

	During the day		During the evening		Total	
	N	% obs.	N	% obs.	N	% obs.
Paris area	**337**	**35%**	**856**	**88%**	**971**	
Bordeaux area	**52**	**31%**	**153**	**90%**	**170**	
Lyon area	**68**	**25%**	**243**	**91%**	**268**	
Nice area (Cote d'Azur)	**92**	**43%**	**194**	**92%**	**212**	
Lille area	**66**	**26%**	**238**	**92%**	**258**	
Toulouse area	**65**	**30%**	**193**	**90%**	**215**	
Geneva area	**48**	**47%**	**84**	**82%**	**103**	
Lausanne area	**34**	**29%**	**109**	**92%**	**118**	
Total	**762**	**33%**	**2070**	**89%**	**2315**	

p = **0.004** ; Khi2 = **20.66** ; dof = **7** (**VS**)



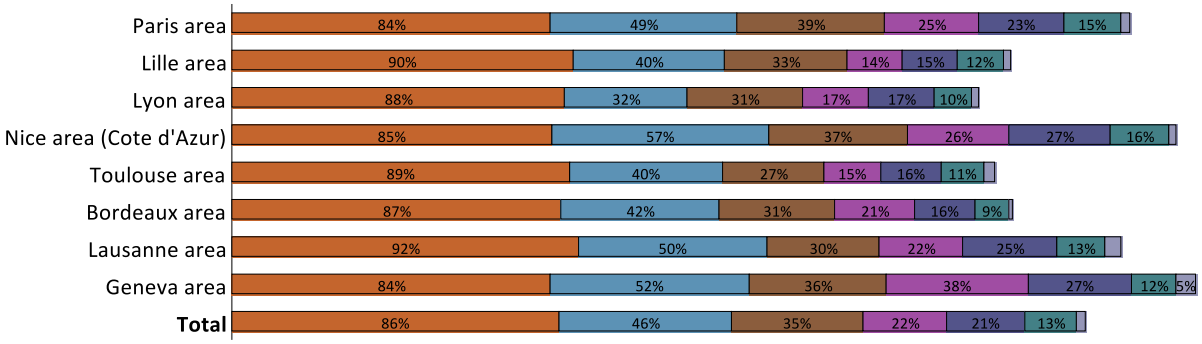
Source: 6t-bureau de recherche, 2015, sample of 2,315 respondents having already used Uber, reporting that they have been making new journeys since they began using private hire services and residing in one of the urban areas studied

We find few notable differences with respect to the reasons for these new journeys. The proportion of users who report that they make new journeys to the train station or airport is especially low in the Lyon urban area (33% compared with 46% of all the urban areas studied) and the proportion of those who report that they make new professional journeys is singularly high in the Geneva urban area (38% compared with 23%).

Figure 171: Distribution by reason for new journeys, by urban area of residence

	Going out (restaurant, cinema, night club, etc.)	To or from a station/ airport	For visits to the family, friends	For business travel	Journeys from home-work / studies	For shopping or purchases	Other	Total
Paris area	84%	49%	39%	25%	23%	15%	2%	
Lille area	90%	40%	33%	14%	15%	12%	2%	
Lyon area	88%	32%	31%	17%	17%	10%	2%	
Nice area (Cote d'Azur)	85%	57%	37%	26%	27%	16%	2%	
Toulouse area	89%	40%	27%	15%	16%	11%	3%	
Bordeaux area	87%	42%	31%	21%	16%	9%	1%	
Lausanne area	92%	50%	30%	22%	25%	13%	4%	
Geneva area	84%	52%	36%	38%	27%	12%	5%	
Total	**86%**	**46%**	**35%**	**22%**	**21%**	**13%**	**2%**	

p = **0.007** ; Khi2 = **67.89** ; dof = **42** (**VS**)



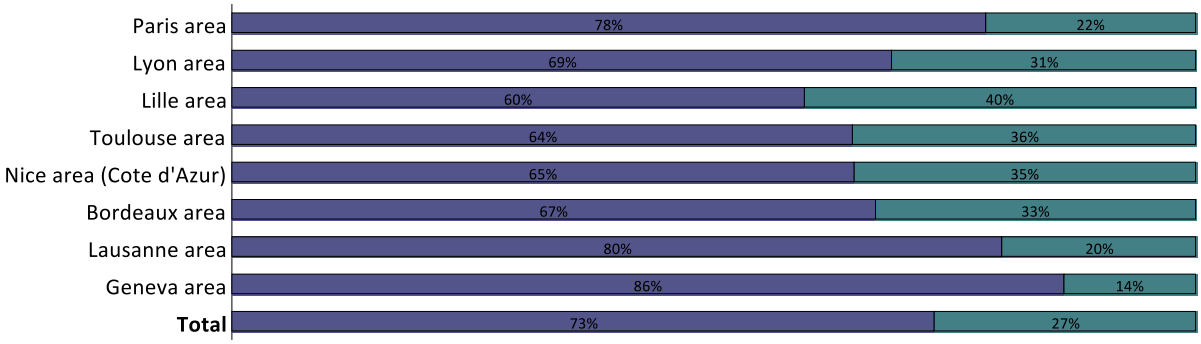
Source: 6t-bureau de recherche, 2015, sample of 2,315 respondents having already used Uber, reporting that they have been making new journeys since they began using private hire services and residing in one of the urban areas studied

Concerning the most recent journey made with Uber, the proportion of users who consider that they could have used another mode than Uber is particularly high in the Paris (78% compared with 73% of the total sample), Lausanne (80%) and Geneva (86%) urban areas. However, it is lower than the average in the French urban areas outside of Paris (from 60% to 69% depending on the urban area).

Figure 172: Proportion of users who feel that they could have used another mode than Uber to carry out their most recent journey with Uber, by urban area of residence

	Yes	No	Total
Paris area	1975	547	2522
Lyon area	415	190	605
Lille area	334	227	561
Toulouse area	321	177	498
Nice area (Cote d'Azur)	295	161	456
Bordeaux area	284	141	425
Lausanne area	280	70	350
Geneva area	285	45	330
Total	**4189**	**1558**	**5747**

p = **<0.01** ; Khi2 = **174.39** ; dof = **7** (**VS**)



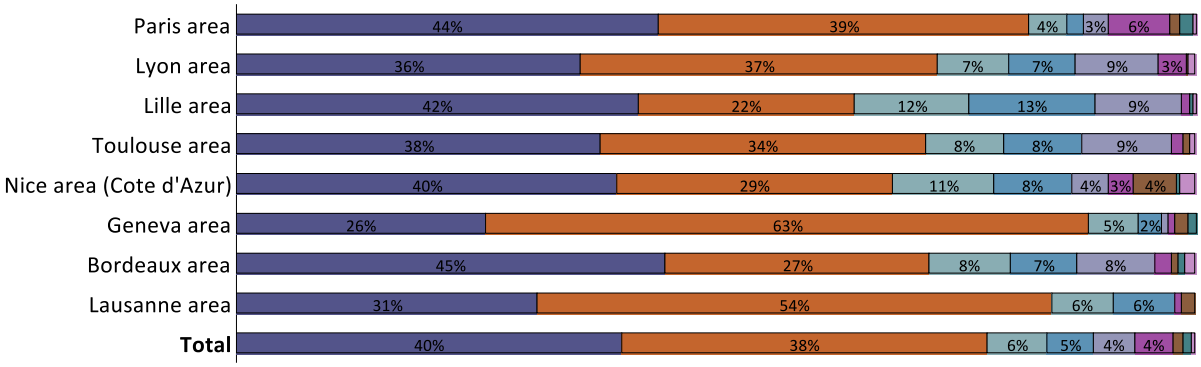
Source: 6t-bureau de recherche, 2015, sample of 5,747 respondents having already used Uber, reporting that they have been making new journeys since they began using private hire services and residing in one of the urban areas studied

In the Geneva and Lausanne urban areas, the proportion of users who use Uber as a substitute for taxis is particularly high (68% and 54%, respectively, compared with 38% of all the responses). In the French urban areas other than Paris, users who use Uber as a substitute for walking are overrepresented (from 7 to 13% depending on the urban area, compared with 5% for all the responses). In the Lille and Nice urban areas, the proportion of users who could have taken a private car are overrepresented (12% and 11%, respectively, compared with 6% of the all responses). In the urban areas of Lyon, Lille and Toulouse, users who could have used a bicycle instead of Uber are also overrepresented (9% in each of these urban areas, compared with 4% of all responses).

Figure 173: Mode of transport that could have been used instead of Uber for the most recent journey made with Uber, by urban area of residence

	public transportation	a taxi	a personal car	on foot	a bicycle (personal or self service)	a different ride-sourcing solution	a motorcycle, a scooter	a self-service car (Autolib)	Other	Total
Paris area	870	763	78	32	51	127	20	28	6	1975
Lyon area	149	154	31	29	36	12	1	0	3	415
Lille area	140	75	40	44	30	3	0	1	1	334
Toulouse area	122	109	26	26	30	4	2	0	2	321
Nice area (Cote d'Azur)	117	85	31	24	11	8	13	1	5	295
Geneva area	74	179	15	7	2	2	4	2	0	285
Bordeaux area	127	78	24	20	23	5	2	2	3	284
Lausanne area	88	150	18	18	0	2	4	0	0	280
Total	**1687**	**1593**	**263**	**200**	**183**	**163**	**46**	**34**	**20**	**4189**

p = **<0.01** ; Khi2 = **533.58** ; dof = **56** (**VS**)



Source: 6t-bureau de recherche, 2015, sample of 4,189 respondents having already used Uber, residing in one of the urban areas studied, having made their most recent journey with Uber in the urban area where they reside and who consider that they could have used another mode of transport than Uber for that journey

IN SHORT: THE IMPACTS OF PRIVATE HIRE SERVICES

Private hire services cause a slight (but statistically significant) decrease in the fleets of cars and two-wheeled motor vehicles of the households concerned.

On the other hand, private hire services create mobility: they allow 40% of their users to make journeys that they did not make previously. This is even more pronounced for users who do not have a driving license: 53% declare making new trips.

Among users who declared to make new trips, 89% make all of them or part of them at night and 34% all of them or part of them at daytime. These services contribute to economic activity in general and to the night-time economy in particular. They therefore fill a gap in the public transport offer, especially for journeys at night.

Private hire services cause a moderate decrease in the use of public transport and a slight decrease in the use of other modes of transport, with the exception of taxis, for which the decrease is greater. It must, however, be noted that a significant proportion of the users of peer-to-peer transportation services did not use or infrequently used taxis before and that over half the users of licensed transportation services consider taxis as an alternative to their travel with Uber. In addition, when private hire services are not available, the taxi option becomes an alternative for 39 % of the users.

Although a part of the taxi clientele is also Uber clientele, Uber accustoms or reaccustoms a portion of the users to using taxis.

Conclusion

Private hire services respond to a demand and create a new market

Licensed transportation services meet a latent demand. It is not the price that is mainly highlighted by the users of these services but rather the quality of service. According to these users, the main strengths of these services with respect to taxis are the efficiency of the smartphone application and the method of payment; two assets which taxis could benefit from by either adopting the Uber application or by reinforcing the development of a similar application for their users.

Peer-to-peer transportation services are creating a new market and a new demand. The users of these services are predominantly young people and students, a target that is virtually non-existent among taxi users and not very present among the users of licensed transportation services. In addition, the users of peer-to-peer transportation services constitute a reserve for licensed transportation services and taxis. Indeed, one can imagine that when they are older and have higher incomes, they will also use licensed transportation services and taxis. Peer-to-peer transportation services create habits of use among a young population that will massively use all private hire services when they are older.

Finally, whether it is for licensed or peer-to-peer transportation services, the Uber application has very clearly developed their use. Indeed, whereas the average frequency of use of a taxi user is 2.6 journeys per month, the average frequency of use of private hire services is 4,2 journeys per month: i.e. 40% more journeys. It can be assumed that the taxi has become an alternative for users who did not use them before.

Private hire services change mobility behavior

In relation to the various niche modes of transport (car-sharing, carpooling, etc.), private hire services consist of an offer whose impact is very direct and massive on the changes in mobility behavior. Sixty-four percent of the users of private hire services report that it is Uber (and not other events of life: relocation, change of employment, etc.) that is responsible for their change of habits. This is reported by almost 70% in the Paris urban area, whereas, for example, only 40% of car sharers consider that this is the case (6t, 2013).

40% of users declare that Uber allows them to make journeys (and therefore undertake activities) that they could not have done before. Finally, for the most recent journey that they have made with Uber, 27% say that it is a journey they could not have made otherwise. It can therefore be assumed that 27% of the journeys made with Uber are for travel that would not have taken place without Uber. For the most part, these are for recreational outings (restaurant, cinema, theatre, nightclub, etc.) and mainly take place in the evening. They therefore have a direct impact on economic activity while limiting the number of road accidents that can be related to nightlife. This increase in mobility is even more pronounced for users who do not have a driving license. Fifty-three percent consider that they make more journeys than before and 36% say they could not have made their most recent journey without private hire services.

Private hire services are proving to be a real alternative for those users without a driving license, which represent 20% of all users and who are for the most part younger with lower incomes.

Private hire services inspire confidence

In addition to being a habit that is now integrated into the daily lives of several hundreds of thousands of users in France and Switzerland, the users have a total confidence in Uber which goes beyond the question of the effectiveness of the service. Indeed, 53% declare that they are favorable to the idea of allowing their child to travel unaccompanied with Uber while only 38% of taxi users are favorable to letting their child travel alone in a taxi.

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Annexes

ANNEX 1. QUESTIONNAIRE

Private hire transport solutions and you

Where do you live?

- ❍ Paris area
- ❍ Bordeaux area
- ❍ Lyon area
- ❍ Nice area (Côte d'Azur)
- ❍ Lille area
- ❍ Toulouse area
- ❍ Elsewhere in France
- ❍ Geneva area
- ❍ Lausanne area
- ❍ Elsewhere in Switzerland
- ❍ Elsewhere abroad

Have you ever used an application that connects users with licensed drivers (UberX, UberBERLINE, AlloCab, LeCab, Chauffeur Privé, etc.)?

- ❍ Yes
- ❍ No

Have you ever used an application that connects users with peer-to-peer drivers (uberPOP, Heetch, Djump, etc.)?

- ❍ Yes
- ❍ No

The study covers the use of private hire transport solutions which are offered by these applications.

What is the main reason you have never used one of these solutions? (only one answer possible)

- ❍ It is more expensive than taking my own car
- ❍ It is less convenient than a taxi
- ❍ It is more expensive than public transport
- ❍ It is more expensive than a taxi
- ❍ It is less practical than taking my own car
- ❍ It is less practical than public transport
- ❍ I do not (or no longer) have a smartphone
- ❍ It is too complicated to use
- ❍ Other

If 'Other' please specify:

What is the main reason you find private hire transport solutions less practical than your own car?

- ❍ My car is always available
- ❍ My car is more comfortable
- ❍ I prefer to drive myself
- ❍ Other

If 'Other' please specify:

What is the main reason you find private hire transport solutions less practical than public transport?

- ❍ Public transport is faster / more direct
- ❍ Public transport is safer (robbery, aggression, etc.)
- ❍ Public transport is more comfortable
- ❍ Public transport is more often available
- ❍ Public transport is more reliable (travel time)
- ❍ Other

If 'Other' please specify:

What is the main reason you find private hire transport solutions less practical than taxis?

- ❍ Taxis are more often available
- ❍ I am more sure of the fare with taxis
- ❍ The quality of service of taxis is more constant
- ❍ Taxis are more comfortable
- ❍ I can hail a taxi in the street (no need to book)
- ❍ Other

If 'Other' please specify:

Where do you mainly use these solutions?

- ❍ Paris area
- ❍ Bordeaux area
- ❍ Lyon area
- ❍ Nice area (Côte d'Azur)
- ❍ Lille area
- ❍ Toulouse area
- ❍ Elsewhere in France
- ❍ Geneva area
- ❍ Lausanne area
- ❍ Elsewhere in Switzerland
- ❍ Elsewhere abroad

Which of these solutions have you already used? (Multiple answers possible)

- ❑ AlloCab
- ❑ LeCab
- ❑ Chauffeur Privé
- ❑ SnapCar
- ❑ Djump
- ❑ Uber
- ❑ Heetch
- ❑ Other

If 'Other' please specify:

How long have you used these solutions?

- ❍ Less than 3 months
- ❍ 3 to 6 months
- ❍ 6 to 12 months
- ❍ More than 12 months

What solution did you use first?

- ❍ AlloCab
- ❍ SnapCar
- ❍ Chauffeur Privé
- ❍ Uber
- ❍ Djump
- ❍ Heetch
- ❍ Le Cab
- ❍ I don't remember
- ❍ Other

If 'Other' please specify:

Do you use these solutions...

- ❍ Privately
- ❍ Privately and professionally
- ❍ Only professionally

What was your main reason for beginning to use these solutions? (only one answer possible)

- ❍ It was less expensive than taking my own car
- ❍ It was more practical than a taxi
- ❍ It was less expensive than public transport
- ❍ It was less expensive than a taxi
- ❍ It was a new form of transportation that I wanted to try out
- ❍ It was more practical than taking my own car
- ❍ It was more practical than public transport
- ❍ Other

If 'Other' please specify:

Would you say that your main motivation for using these solutions has changed?

❍ Yes ❍ No

If yes, what is your main motivation for using these solutions today? (only one answer possible)

- ❍ It is less expensive than taking my own car
- ❍ It is more practical than a taxi
- ❍ It is less expensive than public transport
- ❍ It is less expensive than a taxi
- ❍ It is more practical than taking my own car
- ❍ It is more practical than public transport
- ❍ Other

If 'Other' please specify:

What is the main reason you find these solutions more practical than your own car? (only one answer possible)

- ❍ No need to park
- ❍ More comfortable
- ❍ No need to drive
- ❍ Other

If 'Other' please specify:

What is the main reason you find these solutions more practical than a taxi? (only one answer possible)

- ❍ More often available than a taxi
- ❍ Fare known in advance
- ❍ Quality of service more constant
- ❍ More comfortable
- ❍ Easier to order via the application
- ❍ No need to have cash or a credit card on me
- ❍ Other

If 'Other' please specify:

What is the main reason you find these solutions more practical than public transport? (only one answer possible)

- ❍ Faster / more direct than public transport
- ❍ Safer than public transport (robbery, aggression, etc.)
- ❍ More comfortable than public transport
- ❍ Available at any hour of the day and night
- ❍ More reliable than public transport (travel time)
- ❍ Other

If 'Other' please specify:

Your opinion on the different means of transport

Can you spontaneously give three adjectives/words to describe public transport?

Three adjectives/words to describe the personal car?

Three adjectives/words to describe the bicycle?

And finally, three adjectives/words to describe private hire transport solutions?

Your subscriptions to transport services

Do you have:

	Yes	No
a public transport subscription?	❍	❍
a subscription to a self-service bicycle system? e.g.: Vélib', Vélo'v, VCUB, V'Lille, Vélo Bleu, VélôToulouse, etc.)	❍	❍
a driving license?	❍	❍
a subscription to a car-sharing service (e.g.: Autolib, Bluely, Auto Bleue, Citiz, Communauto, etc.)	❍	❍
an account with a carpooling website (e.g.: Blablacar, etc.) ?	❍	❍

Your use of private hire transport solutions

How often do you use private hire transport solutions?

- ❍ Every day or almost
- ❍ 2 to 3 times a week
- ❍ Once a week
- ❍ 1 to 3 times a month
- ❍ Less than once a month
- ❍ Never

Up to now, have you used a private hire solution for the following reasons for travel?

	Most of the time	Often	Occasionally	Never
Journeys from home-work / studies	❍	❍	❍	❍
For visits to the family, friends	❍	❍	❍	❍
To or from a station/airport	❍	❍	❍	❍
For shopping or purchases	❍	❍	❍	❍
Going out (restaurant, cinema, night club, etc.)	❍	❍	❍	❍
For business travel	❍	❍	❍	❍
To go to medical services	❍	❍	❍	❍

If you use these solutions for other reasons, please indicate which:

What is the average distance of the trips that you take with these solutions?

- ❍ Less than 3 kilometers
- ❍ From 3 to 6 kilometers
- ❍ From 7 to 10 kilometers
- ❍ From 10 to 15 kilometers
- ❍ From 15 to 20 kilometers
- ❍ More than 20 kilometers
- ❍ I don't know

At what time(s) of the day and week do you usually use these solutions? (Multiple answers possible)

❑ During the week, between 8 a.m. and 8 p.m.
❑ During the week, between 8 p.m. and midnight
❑ During the week, between midnight and 8 a.m.
❑ The weekend, between 8 a.m. and 8 p.m.
❑ The weekend, between 8 p.m. and midnight
❑ The weekend, between midnight and 8 a.m.

What is the main obstacle that you have encountered when using these solutions? (only one answer possible)

❍ Technical problems related to the use of a smartphone
❍ The driver had difficulty finding the way
❍ Driver arrival time too long
❍ No obstacle
❍ Other

If 'Other' please specify:

Do you agree with the following statement (even if you do not have children): "If it was possible, I would be confident to let my unaccompanied child use one of these solutions?"

❍ Totally agree
❍ Tend to agree
❍ Tend not to agree
❍ Totally disagree
❍ I don't know

Your ownership of means of transport

Before you began to use private hire transport solutions, how many automobiles did you have in your household?

❍ None ❍ 1 ❍ 2 or more

How many cars do you currently have in your household?

❍ None ❍ 1 ❍ 2 or more

Before you began to use private hire transport solutions, how many two-wheeled motor vehicles did you have in your household?

❍ None ❍ 1 ❍ 2 or more

How many two-wheeled motor vehicles do you currently have in your household?

❍ None ❍ 1 ❍ 2 or more

Thanks to private hire transport solutions, do you plan to dispense with your car in the next 12 months?

❍ Yes ❍ No

Thanks to private hire transport solutions, do you plan to dispense with one of your cars in the next 12 months?

❍ Yes ❍ No

Without private hire transport solutions, do you think you should buy a car?

❍ Yes ❍ No

Without private hire transport solutions, do you think you should buy an extra car?

❍ Yes ❍ No

Thanks to private hire transport solutions, do you plan to dispense with your two-wheeled motor vehicle in the next 12 months?

❍ Yes ❍ No

Thanks to private hire transport solutions, do you plan to dispense with one of your two-wheeled motor vehicles in the next 12 months?

❍ Yes ❍ No

Without private hire transport solutions, do you think you should buy a two-wheeled motor vehicle?

❍ Yes ❍ No

Without private hire transport solutions, do you think you should buy an extra two-wheeled motor vehicle?

❍ Yes ❍ No

Your use of means of transport

BEFORE USING PRIVATE HIRE TRANSPORTATION SOLUTIONS, how often did you use the following means of transport?

	Every day or almost	2 to 3 times a week	Once a week	1 to 3 times a month	Less than once a month	Never
You used public transport (underground, tram, bus, RER, Transilien)	❍	❍	❍	❍	❍	❍
You took the train (TER, Intercités, TGV)	❍	❍	❍	❍	❍	❍
You used a bicycle:	❍	❍	❍	❍	❍	❍
You used a personal car:	❍	❍	❍	❍	❍	❍
Before these solutions, you carpooled:	❍	❍	❍	❍	❍	❍
You took the taxi:	❍	❍	❍	❍	❍	❍
You used a two-wheeled motor vehicle:	❍	❍	❍	❍	❍	❍
You car-shared:	❍	❍	❍	❍	❍	❍
You walked the full distance:	❍	❍	❍	❍	❍	❍

SINCE USING PRIVATE HIRE TRANSPORTATION SOLUTIONS, how often do you use the following means of transport?

	Every day or almost	2 to 3 times a week	Once a week	1 to 3 times a month	Less than once a month	Never
You use public transport (underground, tram, bus, RER, Transilien)	❍	❍	❍	❍	❍	❍
You take the train (TER, Intercités, TGV)	❍	❍	❍	❍	❍	❍
You use a bicycle:	❍	❍	❍	❍	❍	❍
You use a personal car:	❍	❍	❍	❍	❍	❍
You car-share:	❍	❍	❍	❍	❍	❍
You take the taxi:	❍	❍	❍	❍	❍	❍
You use a two-wheeled motor vehicle:	❍	❍	❍	❍	❍	❍
You car-share:	❍	❍	❍	❍	❍	❍
You walk the full distance:	❍	❍	❍	❍	❍	❍

Would you say that the changes in the ways you use the means of transport are mainly due to:

❍ Your use of private hire solutions ([V16], etc.)

❍ Other events in your life (birth, relocation, change of employment, etc.)

Would you say that since that you have been using these solutions you make journeys that you did not do before?

❍ Yes

❍ No

At what time of day do you make these journeys? (multiple answers possible)

❑ During the day

❑ During the evening

For what reason(s)? (multiple answers possible)

❑ Journeys from home-work / studies
❑ For shopping or purchases
❑ For business travel
❑ Going out (restaurant, cinema, night club, etc.)
❑ For visits to the family, friends
❑ To or from a station/airport
❑ Other

If 'Other' please specify:

Your most recent journey via a private hire transport solution

Now we will look only at your last journey made with a private hire service. When did you use a private hire transport solution for the last time?

- ❍ Less than 3 months ago
- ❍ More than 3 months ago

In what city?

- ❍ Paris area
- ❍ Nice area (Côte d'Azur)
- ❍ Lyon area
- ❍ Lille area
- ❍ Toulouse area
- ❍ Bordeaux area
- ❍ Elsewhere in France
- ❍ Geneva area
- ❍ Lausanne area
- ❍ Elsewhere in Switzerland
- ❍ Elsewhere abroad

Please specify:

What solution did you use?

- ❍ AlloCab
- ❍ LeCab
- ❍ Chauffeur Privé
- ❍ SnapCar
- ❍ Djump
- ❍ Uber
- ❍ Heetch
- ❍ Other

If 'Other' please specify:

What Uber option did you use?

- ❍ ... the UberPOP option
- ❍ ... the UberBERLINE option
- ❍ ... the UberVAN option
- ❍ ... the UberPOOL option
- ❍ ... the UberX option
- ❍ ... the UberBLACK option
- ❍ I don't remember

What was the reason for this last journey?

- ❍ Journey from home-work / studies
- ❍ For shopping or purchases
- ❍ A professional journey
- ❍ Going out (restaurant, cinema, night club, etc.)
- ❍ A visit to the family, friends
- ❍ To or from a station/airport
- ❍ To access medical services
- ❍ Other

If 'Other' please specify: _____

Where did the driver pick you up?

- ❍ In Paris
- ❍ Outside of Paris
- ❍ In Lille
- ❍ Outside of Lille
- ❍ In Lyon
- ❍ Outside of Lyon
- ❍ In Toulouse
- ❍ Outside of Toulouse
- ❍ In Bordeaux
- ❍ Outside of Bordeaux
- ❍ In Nice
- ❍ Outside of Nice
- ❍ In Geneva
- ❍ Outside of Geneva
- ❍ In Lausanne
- ❍ Outside of Lausanne

Where did the driver drop you off?

- ❍ In Paris
- ❍ Outside of Paris
- ❍ In Lille
- ❍ Outside of Lille
- ❍ In Lyon
- ❍ Outside of Lyon
- ❍ In Toulouse
- ❍ Outside of Toulouse
- ❍ In Bordeaux
- ❍ Outside of Bordeaux
- ❍ In Nice
- ❍ Outside of Nice
- ❍ In Geneva
- ❍ Outside of Geneva
- ❍ In Lausanne
- ❍ Outside of Lausanne

Did the driver come to pick you up at your home?

- ❍ Yes
- ❍ No

What means of transport did you use to go to the pick-up point?

- ❍ Public transport (underground, tram, bus, RER, Transilien)
- ❍ A taxi
- ❍ On foot
- ❍ A motorcycle, a scooter
- ❍ A bicycle (personal or self service)
- ❍ The train (TER, Intercités, TGV)
- ❍ A personal car
- ❍ The same private hire solution
- ❍ A different private hire solution
- ❍ A plane
- ❍ A self-service car (Autolib)
- ❍ Other

If 'Other' please specify:

Example: the driver took you from the cinema to the restaurant. How did you get from your home to the cinema?

Did the driver drop you off at your home?

- ❍ Yes
- ❍ No

What means of transport did you then use to get from your drop-off point to your next destination (home or other)?

- ❍ Public transport (underground, tram, bus, RER, Transilien)
- ❍ A taxi
- ❍ The same private hire solution
- ❍ A different private hire solution
- ❍ On foot
- ❍ A motorcycle, a scooter
- ❍ A bicycle (personal or self service)
- ❍ The train (TER, Intercités, TGV)
- ❍ A personal car
- ❍ A plane
- ❍ A self-service car (Autolib)
- ❍ Other

If 'Other' please specify:

Example: the driver took you from the cinema to the restaurant. After the restaurant, you decided to go out to a night club or go home. What means did you use then?

What means of transport did you use to get from your drop-off point to your next destination?

- ❍ Public transport (underground, tram, bus, RER, Transilien)
- ❍ A taxi
- ❍ The same private hire solution
- ❍ A different private hire solution
- ❍ On foot
- ❍ A motorcycle, a scooter
- ❍ A bicycle (personal or self service)
- ❍ The train (TER, Intercités, TGV)
- ❍ A personal car
- ❍ A plane
- ❍ A self-service car (Autolib)
- ❍ Other

If 'Other' please specify:

How many kilometers did you travel during this last journey with Uber?

- ❍ Less than 3 kilometers
- ❍ From 3 to 6 kilometers
- ❍ From 7 to 10 kilometers
- ❍ From 10 to 15 kilometers
- ❍ From 15 to 20 kilometers
- ❍ More than 20 kilometers
- ❍ I don't know

At what time of the day and of the week did you take this last journey with Uber?

- ❍ During the week, between 8 a.m. and 8 p.m.
- ❍ During the week, between 8 p.m. and midnight
- ❍ During the week, between midnight and 8 a.m.
- ❍ The weekend, between 8 a.m. and 8 p.m.
- ❍ The weekend, between 8 p.m. and midnight
- ❍ The weekend, between midnight and 8 a.m.

How long did this last journey with Uber take?

- ❍ Less than 15 minutes
- ❍ Between 16 and 30 minutes
- ❍ More than 30 minutes
- ❍ I don't remember

How much did this last journey with Uber cost?

- ❍ Less than 5 euros
- ❍ Between 5 and 10 euros
- ❍ Between 11 and 20 euros
- ❍ Between 21 and 30 euros
- ❍ More than 30 euros
- ❍ I don't remember

How much did this last journey with Uber cost?

- ❍ Less than 5 CHF
- ❍ Between 5 and 10 CHF
- ❍ Between 11 and 20 CHF
- ❍ Between 21 and 30 CHF
- ❍ More than 30 CHF
- ❍ I don't remember

How many passengers, including yourself but excluding the driver, were in the vehicle?

Could you have used another means of transport than Uber?

- ❍ Yes
- ❍ No

If yes, what means of transport would you have taken? (only one answer possible)

- ❍ public transport
- ❍ a self-service car (Autolib)
- ❍ a different private hire solution
- ❍ a taxi
- ❍ a motorcycle, a scooter
- ❍ on foot
- ❍ a bicycle (personal or self service)
- ❍ a personal car
- ❍ Other

If 'Other' please specify:

Why did you prefer Uber? (only one answer possible)

- ❍ It was safer (aggression, robbery, etc.)
- ❍ It was more comfortable
- ❍ It was faster
- ❍ Better quality service
- ❍ Available nearby
- ❍ It allowed me to be more sure of my travel time
- ❍ It allowed me to get to my destination without getting lost
- ❍ It was cheaper
- ❍ Other

If 'Other' please specify:

Your situation

You are:

❍ A man ❍ A woman

Your age:

You now live:

❍ Alone
❍ As a couple without children
❍ As a couple with one child
❍ As a couple with several children
❍ Alone with a child
❍ Alone with several children
❍ Other

If 'Other' please specify:

How many people are there in your household (including yourself)?

What is your current activity?

❍ In training (student)
❍ Active full time (+ 32hr/week)
❍ Active part-time (up to 32hr/week)
❍ Looking for employment
❍ Homemaker
❍ Retired

And what is your occupational category?

❍ Craftsman, shopkeeper
❍ Company manager
❍ Manager, higher intellectual profession
❍ Middle-level profession
❍ Employee
❍ Worker
❍ Student
❍ Retired
❍ No professional activity

What is the level of the last diploma you received?

❍ No diploma
❍ BEP/CAP (vocational training certificate) or equivalent
❍ Baccalauréat (high school diploma) or equivalent
❍ 2 years of university (technical degree, etc.)
❍ 3 years of university (B.A.)
❍ 5 years of university (M.A.)
❍ More than 5 years of university (specialized M.A., PhD)

Where is your main place of residence?

What is the postcode of your main residence?

Is your place of work/studies...

❍ Fixed (you have only one place of work)
❍ You work at home
❍ Itinerant (you have several places of work)

Where is your main place of work/study?

If you have a main place of work/study, where is it situated?

What is the postal code, if you know it?

Finally, what is the total net monthly income (with allowances and other support) of your household counting the income of all its members? (in euros)

❍ Less than 900
❍ From 901 to 1,500
❍ From 1,501 to 2,000
❍ From 2,001 to 3,000
❍ From 3,001 to 4,000
❍ From 4,001 to 5,000
❍ From 5,001 to 6,000
❍ From 6,001 to 7,000
❍ From 7,001 to 8,000
❍ From 8,001 to 9,000
❍ From 9,001 to 10,001
❍ From 10,001 to 11,000
❍ From 11,001 to 12,000
❍ 12,001 or more
❍ I do not wish to reply

Finally, what is the total net monthly income (with allowances and other support) of your household counting the income of all its members? (in CHF)

- ❍ Less than 900
- ❍ From 901 to 1,500
- ❍ From 1,501 to 2,000
- ❍ From 2,001 to 3,000
- ❍ From 3,001 to 4,000
- ❍ From 4,001 to 5,000
- ❍ From 5,001 to 6,000
- ❍ From 6,001 to 7,000
- ❍ From 7,001 to 8,000
- ❍ From 8,001 to 9,000
- ❍ From 9,001 to 10,001
- ❍ From 10,001 to 11,000
- ❍ From 11,001 to 12,000
- ❍ 12,001 or more
- ❍ I do not wish to reply

What led you to sign up to Uber?

- ❍ Word of mouth
- ❍ Website / Internet
- ❍ Press
- ❍ TV / radio
- ❍ Other

If 'Other' please specify:

Now that you are at the end of this questionnaire, do you have any comments or suggestions you would like to add?

ANNEX 2. UBER DATA ANALYSIS AND COMPARISON WITH THE OFFERS OF TRANSPORT IN THE CITIES STUDIED

Elements to be taken into account for the analysis of the graphs:

Calculation of the number of journeys

The numbers and proportions of journeys are calculated by the hour. Each point of the curve situated at a half-hour or hour (depending on the data) is valid for the surrounding hour.

Scales

The scales of the different curves on the graphs are not the same:

- In order to preserve the confidentiality of company information, the number of journeys made with Uber each hour has been indexed. The yellow and green curves of each graph therefore refer to the scale to left of the graph, expressed in percentages. Their purpose is to account for the distribution of Uber journeys throughout the course of a day. The proportions of journeys are calculated by the hour, such that the sum of the 24 values at the "hour and a half" points of the X-axis is equal to 100%. The scale of reference of these curves is the same for all cities.

- The orange curves, representing the total number of journeys made at each hour, follow the scales to the right of the graphs. These scales are expressed in numbers and not in parts and are different according to the city. If the yellow and green curves of the different graphs can be compared between each other for the cities, this is not directly the case of the orange curves.

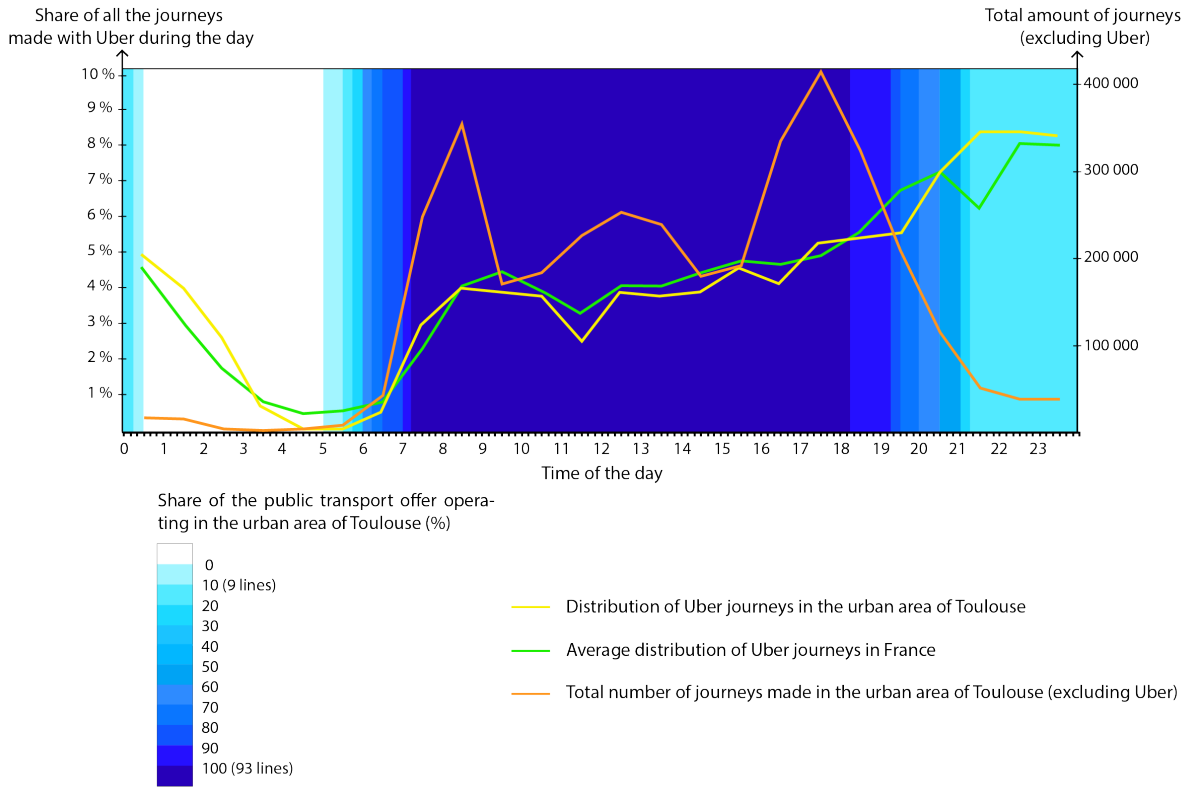
Due to this difference in scale, the Y-axis values of the orange curves cannot be directly compared to the values of the green and yellow curves, but the general tendencies of the curves can be compared.

Source of data

The curves representing the total numbers of journeys by city are from the Household Travel Surveys. The date of the collection of the data can therefore vary by city. In several cases, the data are unavailable between 9/10 p.m. and 4 a.m. and the curve has therefore been interrupted. It can be assumed that the absence of data means that the proportion of journeys made during this period is negligible or that the number of journeys made is too low to be measured. Thus, a specificity concerning the data relating to the city of Lyon should be noted: the data are given by the hour between 4 a.m. and 9 p.m. and then it is specified that the

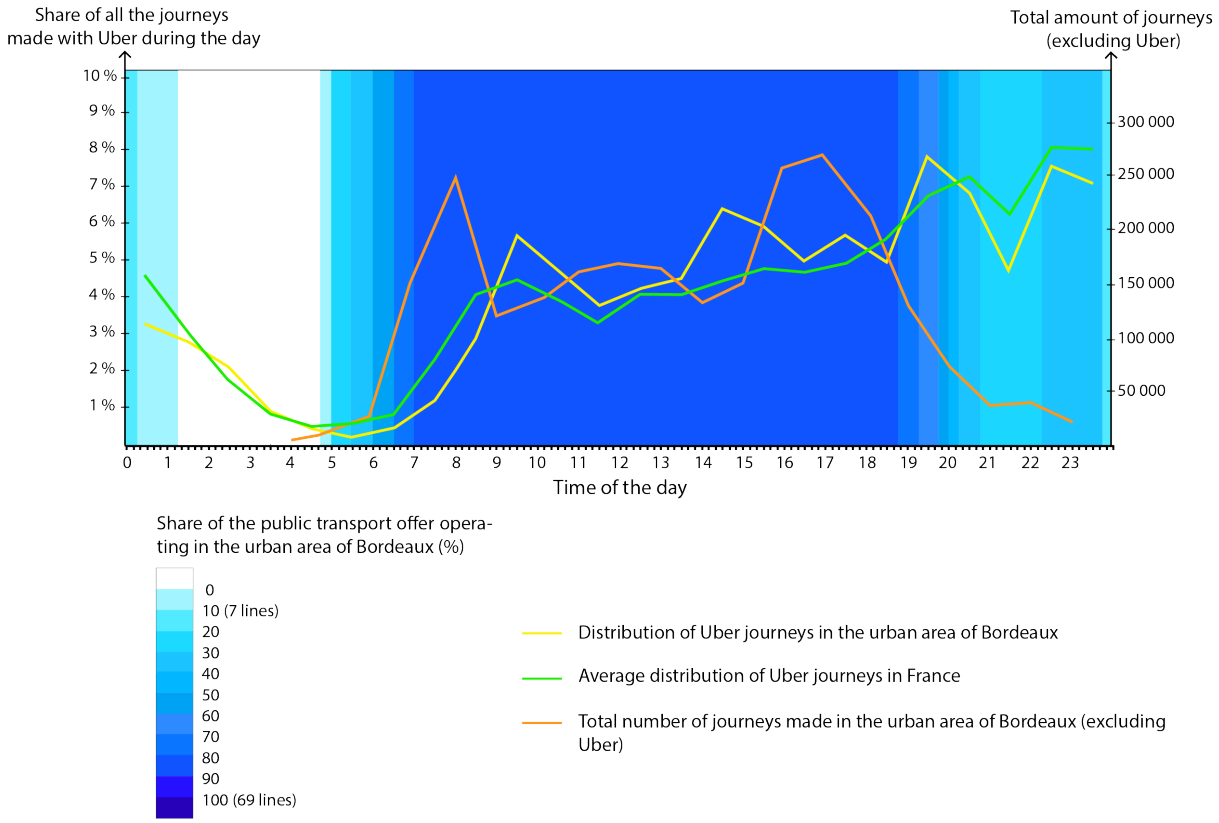
number is stable after midnight, at around 15,000 journeys per hour. Nothing being specified for the period between 9 p.m. and midnight, it was considered that the decrease in the number of journeys per hour should be linear.

Figure 174: Distribution of Uber journeys during the day in relation to the distribution of all journeys and to the public transport offer of the urban area of Toulouse



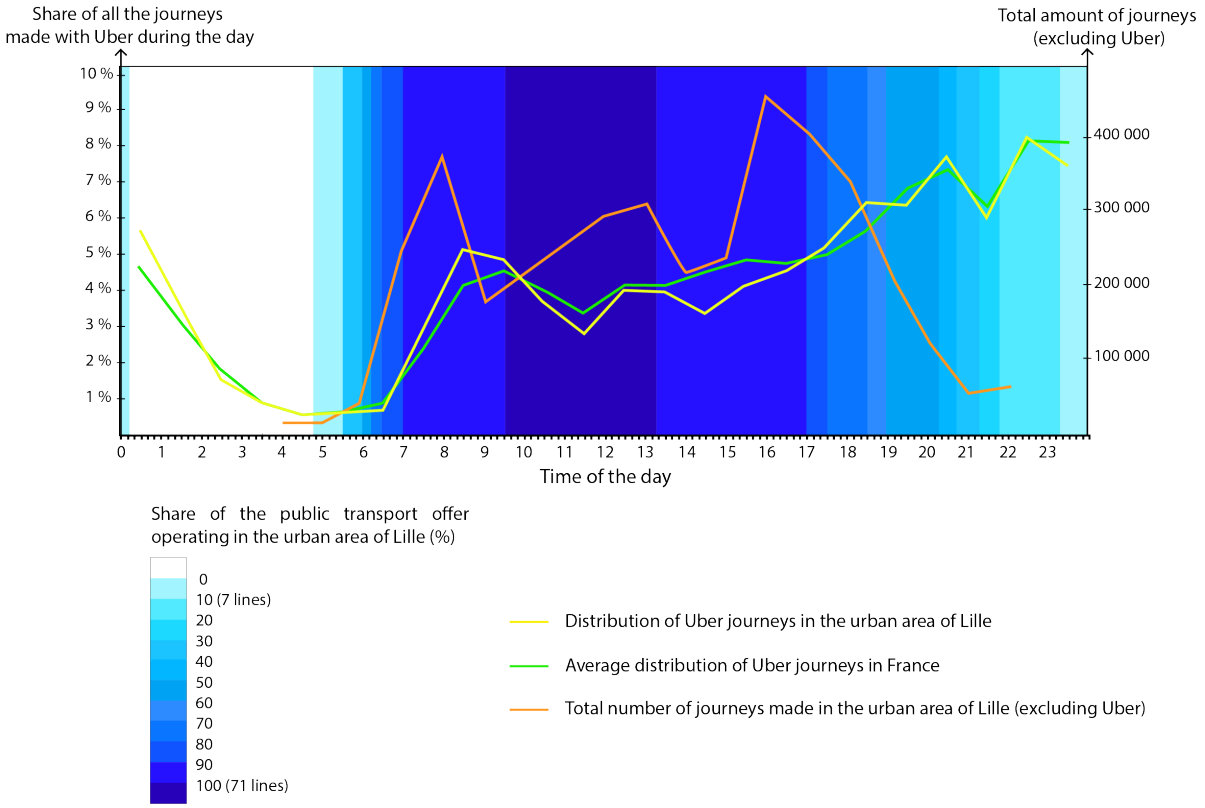
Source: Source: compiled by 6t-bureau de recherche based on Uber and EMD data

Figure 175: Distribution of Uber journeys during the day in relation to the distribution of all journeys and to the public transport offer of the urban area of Bordeaux



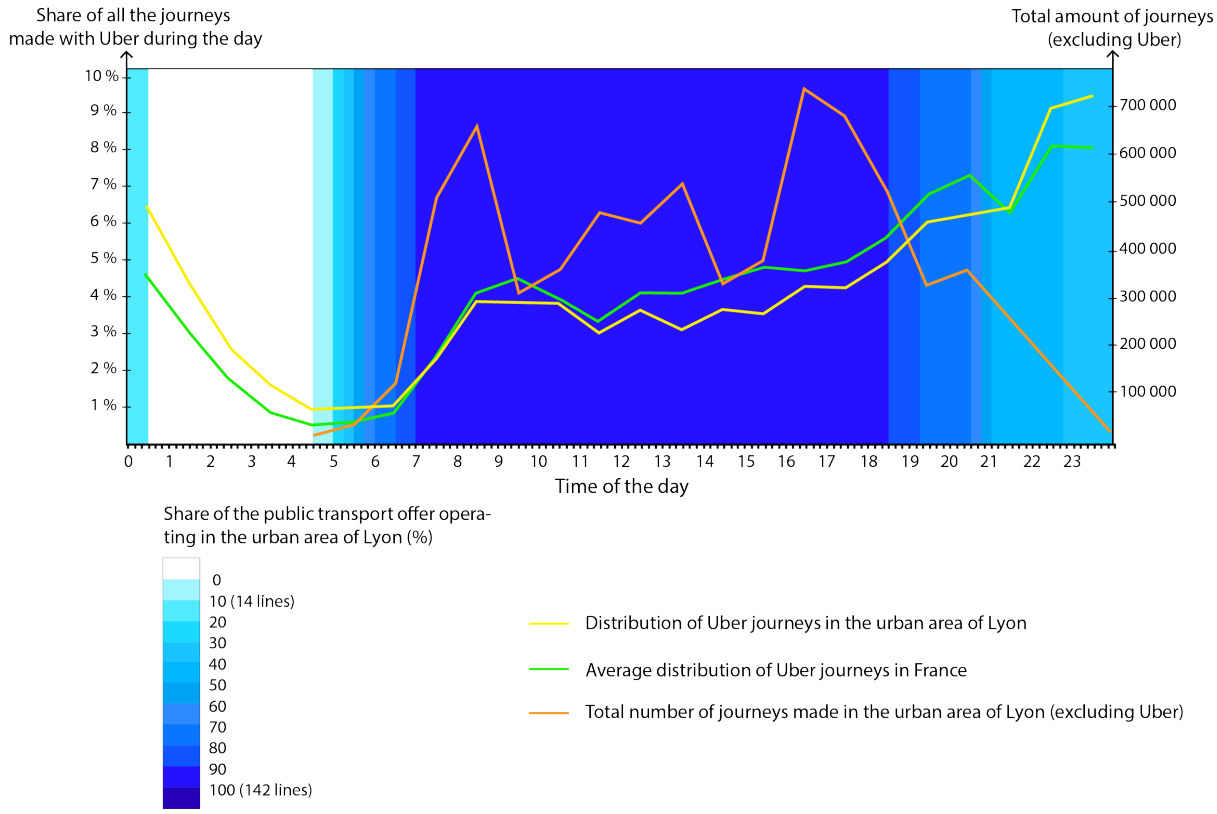
Source: Source: compiled by 6t-bureau de recherche based on Uber and EMD data

Figure 176: Distribution of Uber journeys during the day in relation to the distribution of all journeys and to the public transport offer of the urban area of Lille



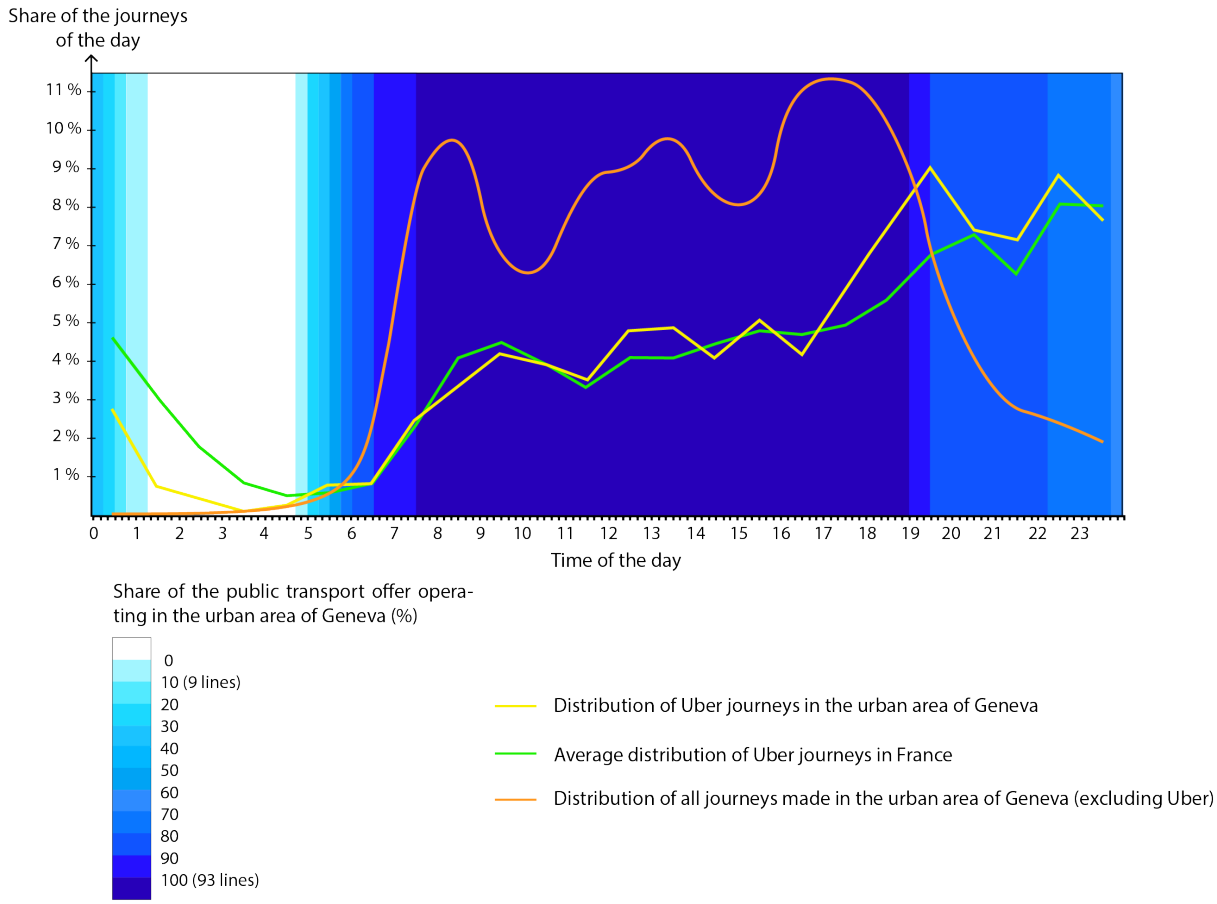
Source: Source: compiled by 6t-bureau de recherche based on Uber and EMD data

Figure 177: Distribution of Uber journeys during the day in relation to the distribution of all journeys and to the public transport offer of the urban area of Lyon



Source: Source: compiled by 6t-bureau de recherche based on Uber and EMD data

Figure 178: Distribution of Uber journeys during the day in relation to the distribution of all journeys and to the public transport offer of the urban area of Geneva



Source: Source: compiled by 6t-bureau de recherche based on Uber and EMD data

TABLE OF FIGURES

TABLE OF CONTENTS

6t – bureau de recherche in brief

The ambition of the 6t research bureau is to situate itself at the interface of academic research and applied study to meet the demand by high-level expertise, while producing scientific and technical knowledge at the service of decision taking.

The expertise of 6t allows it to mobilize various types of methods that are specific to the understanding of urban sociology and geography, and to conduct qualitative, quantitative and cartographic analyses.

This variety of expertise is based on a multidisciplinary team composed of sociologists, geographers, specialists of political science, engineers and city planners who regularly accompany public authorities on urban issues related to mobility, usage and lifestyles. In this context, 6t has conducted many studies on sharing mobility.

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