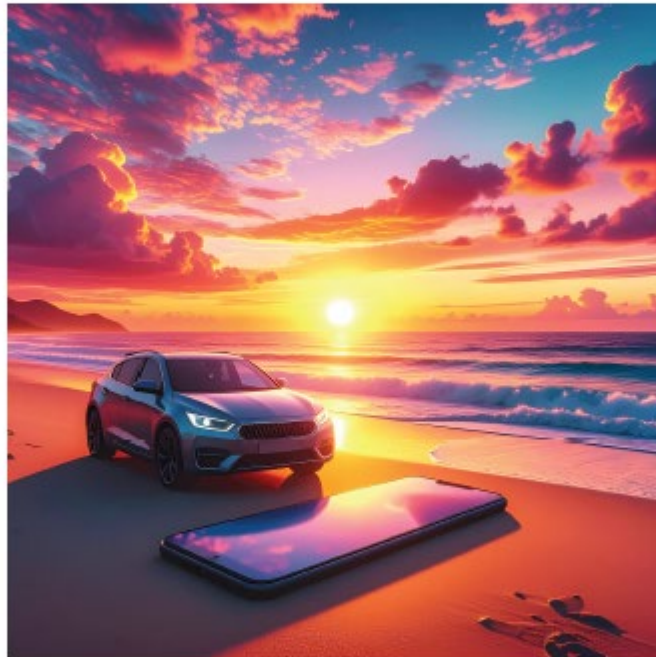

Vehicle Sharing Study

August 2026



St. Lucie Transportation
Planning
Organization

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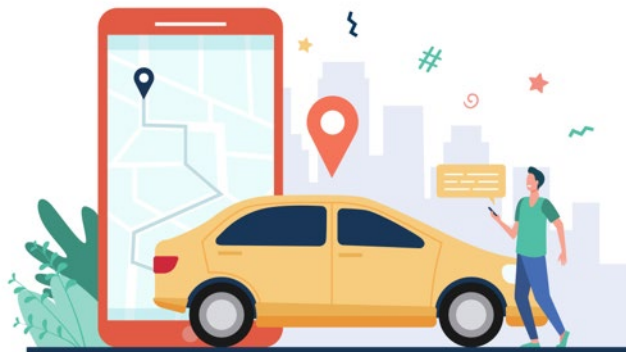
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INTRODUCTION

A car share program is characterized by self-service, short-term rentals. Instead of picking up and dropping off cars at retail outlets, car share users locate the vehicles at designated parking spots using cellphone apps to check availability and unlock the vehicles. Rentals can be very brief, lasting an hour or less. Car sharing can supplement car ownership, fill public transportation gaps, and reduce traffic congestion.

The basic car share formats are round-trip, station-based or one-way, station-based, where the “stations” are dedicated parking spaces. In round-trip sharing, the user picks up and returns the vehicle to the same location. One-way sharing permits users to return vehicles to assorted sites. In either format, users book cars independently, with the vehicles accessible for use throughout the day, subject to demand by other users.

Establishing a car share program with two vehicles each in Port St. Lucie and Fort Pierce suggests a strong possibility of positive impacts. Both cities have high rates of car ownership, but gaps in public transportation point to a demand for shared vehicles. Program success would hinge upon targeted community outreach, strategic placement of the vehicles, and price. Both Zipcar and Enterprise Mobility have expressed interest in establishing round trip, station-based car share programs within St. Lucie County.



CAR SHARE VS TRADITIONAL RENTAL

Car share has several advantages over traditional rentals. Car share vehicles are available 24/7 versus the limited hours at most rental counters. Except for airport locations, few rental companies are open in the evenings, and extended weekend hours are rare. Car rental companies are generally based along commercial corridors versus flexible locations for car share.

Car share rentals can be short-term whereas traditional rentals are generally a minimum of one day. Car shares can be rented hourly, which facilitates quick, multi-stop errands.

Traditional rentals hold an advantage over car share in that traditional rentals offer unlimited mileage, making them better suited for long term use and long-distance travel. The wider range of vehicles offered by traditional rental companies further supports long-distance trips.



CAR SHARE MODEL OVERVIEW

- **Self-service:** Real-time booking, keyless entry, and 24/7 access. Members reserve and unlock cars via phone apps.
- **Usage:** Short-term, occasional, as-needed
- **Congestion Reduction:** A car share vehicle typically replaces up to 15 private cars annually
- **Benefits:** Pollution and congestion reduction, increased mobility, cost savings for users
- **Pricing:** Approximately \$15 per hour with discounts for longer rentals, frequent users, and targeted groups such as students or elderly persons
- **Upkeep:** One hundred percent of the operational burden, e.g., fleet maintenance, safety checks, and cleaning performed by the car share company
- **Marketing and Community Engagement:** Promotions, incentives and user surveys for feedback

CAR SHARING BENEFITS

Economic

There are numerous fixed costs associated with car ownership. These costs include car payments, insurance and maintenance. Car sharing relieves this economic burden, particularly for households struggling with housing affordability. Car sharing enhances job search, social interaction, educational pursuits, and employment for those who cannot afford cars or wish not to own cars.

According to a study by the Victoria Transport Policy Institute, by not owning a car, households can save between \$500 to \$1,500 annually on vehicle-related expenses. If a car share program allowed a multi-car household to downsize by one vehicle, the monthly savings could be a massive buffer against housing costs.

The U.S. Environmental Protection Agency (EPA) further analyzed the cost of car ownership by delving into intangible costs such as time spent looking for parking spaces and depreciation. Having a car at one's disposal is convenient but most vehicles sit parked for hours while the car owner works, attends school, or relaxes at home.

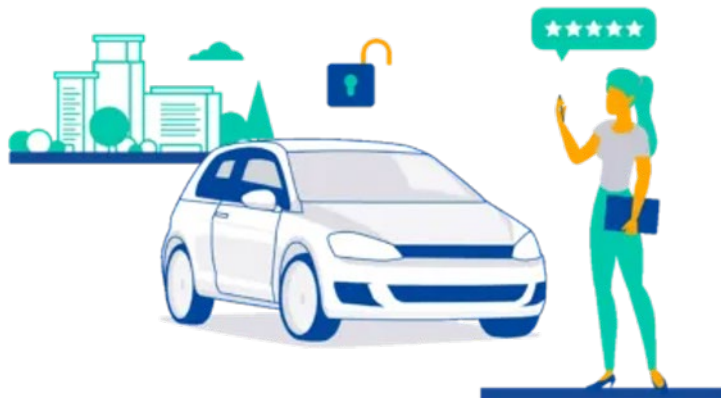
Congestion Management

Car share programs promote shared mobility and optimize the use of existing vehicles. These outcomes align with broader goals in transportation planning.

Universities have conducted research on various aspects of car sharing. A study by University of California, Berkely revealed a reduction of 15 personal vehicles for every sharing vehicle. Because car sharing is less convenient than car ownership, a car share user is more likely to consolidate trips, eliminate some trips altogether, or use human-powered means of transport, thus reducing traffic congestion.

Social

By expanding access to flexible means of transportation, car sharing supports increased mobility for drivers. Unlike owning a single vehicle that must serve a variety of purposes, car share programs allow users to choose the vehicles that fit their needs. Car sharing enhances job search, social interaction, and educational and employment opportunities for those who cannot afford car ownership, especially when the vehicles are based in neighborhood locations.



CAR SHARING DISADVANTAGES

One of the disadvantages of car sharing is the limited availability of the programs themselves. Car sharing is most effective in densely populated areas where transit options are plentiful, parking is expensive or unavailable, and people need vehicles only occasionally. Examples are central cities and large universities. Less populated areas are often not a good fit for car share despite limited mobility options.

Car share programs have a fixed number of vehicles available, which can lead to shortages during periods of peak demand. This has led to a practice known as “car hoarding,” where users book vehicles for long periods just to have a vehicle available for personal use when needed.

Another concern with car sharing is hygiene. Although users are expected to clean vehicles after use, users don’t treat the vehicles with the same care they would their own, leading to cleanliness issues such as littered or poorly maintained interiors. This leads to potential health concerns related to exposure to germs or allergens. Car share companies have policies against smoking, but this policy, if violated, places the burden on the next user to report. In cases of serious soiling, users are asked to contact the company, and the company comes out to clean the cars and charge the costs to the person responsible.

During the COVID-19 Pandemic, car sharing usage plunged due to potential risks associated with shared surfaces and enclosed spaces. Although car share vehicles are rigorously cleaned and disinfected as part of the car share company’s regular cleaning cycle, users cannot be relied upon to disinfect between uses. Nor can the vehicles be properly aired out between uses.

Liability is another concern. Car share companies manage risk and limit their liability by limiting usage to safe drivers, having users sign waivers, keeping equipment well maintained, requiring users to complete orientations prior to use, and educating users about road safety.

DEMAND ASSESSMENT

St. Lucie County is experiencing explosive population growth. Populations of senior citizens, students, tourists, transit users, and people who need occasional car access are also growing. Large families who may not have sufficient automobiles for all household adults are another potential sharing population.

Based on best practices and current car share trends, once a car share vendor is chosen, a market assessment would be the first step in implementing a program. The assessment would include a general analysis of population and employment densities, car ownership rates, gaps in existing transportation options, and public transit use. Assessments would include performance at similar sites, also known as peer analyses. The goal is to identify specific locations with strong potential demand and set realistic expectations for implementation. After launch, multiple use factors would be monitored to estimate ongoing demand.



INTEGRATION WITH PUBLIC TRANSIT

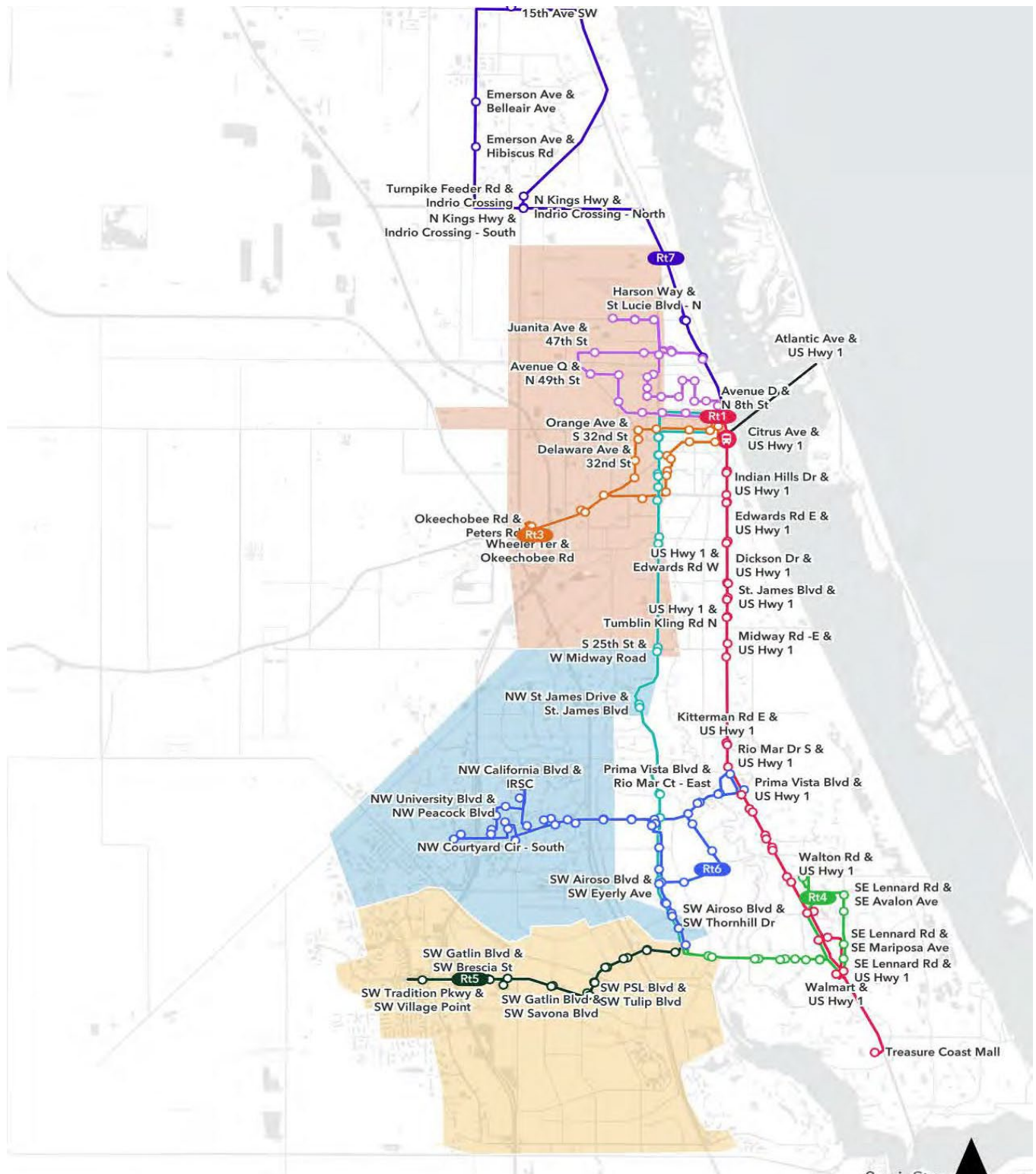
Car sharing competes with public transportation to some degree. However, in some instances, car sharing fills gaps in public transit service rather than directly replacing it. Car sharing is often seen as an extension of public transportation, particularly in areas where the only transit available is fixed route bus service.

Car sharing offers flexible routes, 24/7 availability, efficiency, and privacy, all of which attract so-called choice riders -- those who are not dependent on public transportation. On the other hand, car sharing eligibility can be a barrier due to the necessity of possessing a driver's license and a clean driving record. St. Lucie County's public transportation, both fixed route and door-to-door On-Demand, are fare-free, with no eligibility requirements, which is a distinct advantage over car sharing barriers. On the other hand, gaps in public transportation exist as shown in the following Area Regional Transit (ART) system map.

Co-locating shared ways of travel at or near public transportation hubs is a common practice that supports increased transit usage. Studies suggest that people who use shared mobility services (including car sharing) are less likely to own a car and thus more likely to use public transit. The TPO's *Reimagine Mobility 2050 Long Range Transportation Plan (LRTP)* supports the development of transportation hubs which co-locate transportation options, allowing for seamless transfers among transportation modes. Car sharing, when positioned near transit hubs, can fill first-last mile gaps; first/last mile refers to how riders arrive at transit stops.



Area Regional Transit (ART) System



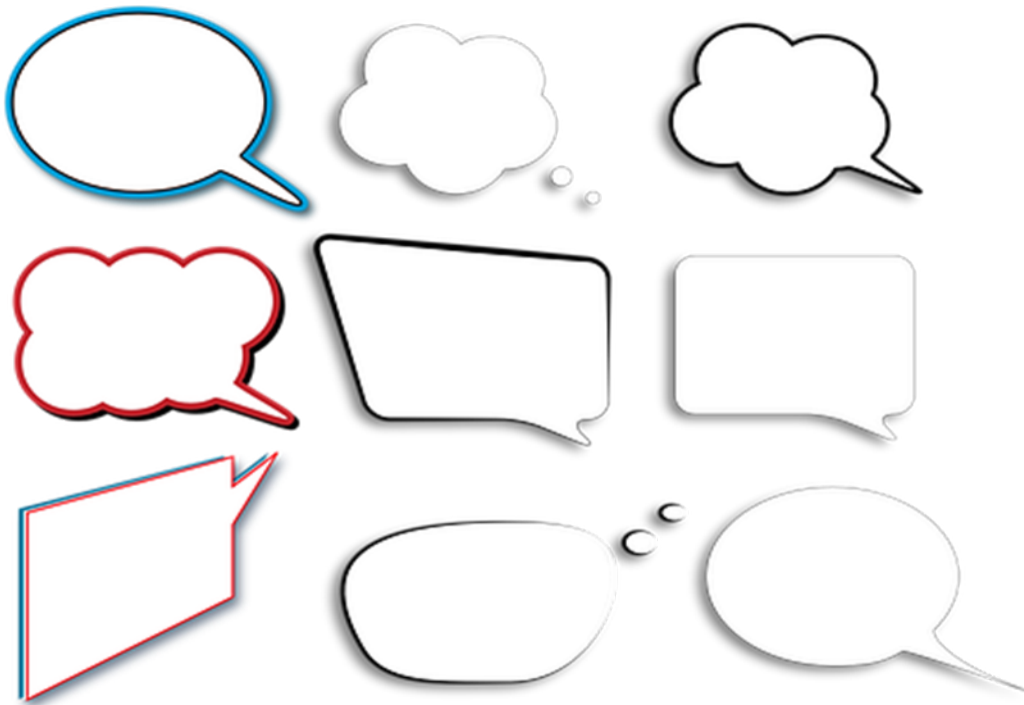
CAR SHARE COMPARISON

The table below compares four different modes of transportation if used for multi-stop trips over a two-hour period: Uber Hourly, car share, traditional car rental, and ART On-Demand microtransit. Uber Hourly, which allows for a block of time with a dedicated driver, is not yet available within St. Lucie County but is being used here for illustrative purposes.

Feature	Uber Hourly	Zipcar	Traditional Car Rental	ART On-Demand
Who Drives?	Uber driver	User driven	User driven	Professional transit driver
Multiple Stops?	Yes (same vehicle)	Yes (same vehicle)	Yes (same vehicle)	Under certain conditions
Estimated Base Cost	\$100 (\$50/hr minimum)	\$30 (\$15/hr)	\$50 daily, deposit required	Free (Fare-free public microtransit)
Gas & Insurance	Included	Included	User pays gas & insurance	Included
Mileage Limits	Varies by city; overage fees apply	Varies by membership plan	Unlimited (for most standard rentals)	Restricted to designated microtransit zones
Pickup/Return	Curb-to-curb	Designated parking spot	Retail outlet	Curb-to-curb
Hours of Operation	24/7	24/7	Limited	Limited
Entry Barrier	Minimum Age	Driver's license/clean record	Driver's license/clean record	Minimum Age
Best For	Multi-stop trips without parking hassle	Multi-stop trips	All-day trips or multi-day use out of town	Local trips inside microtransit zones

PROMOTION

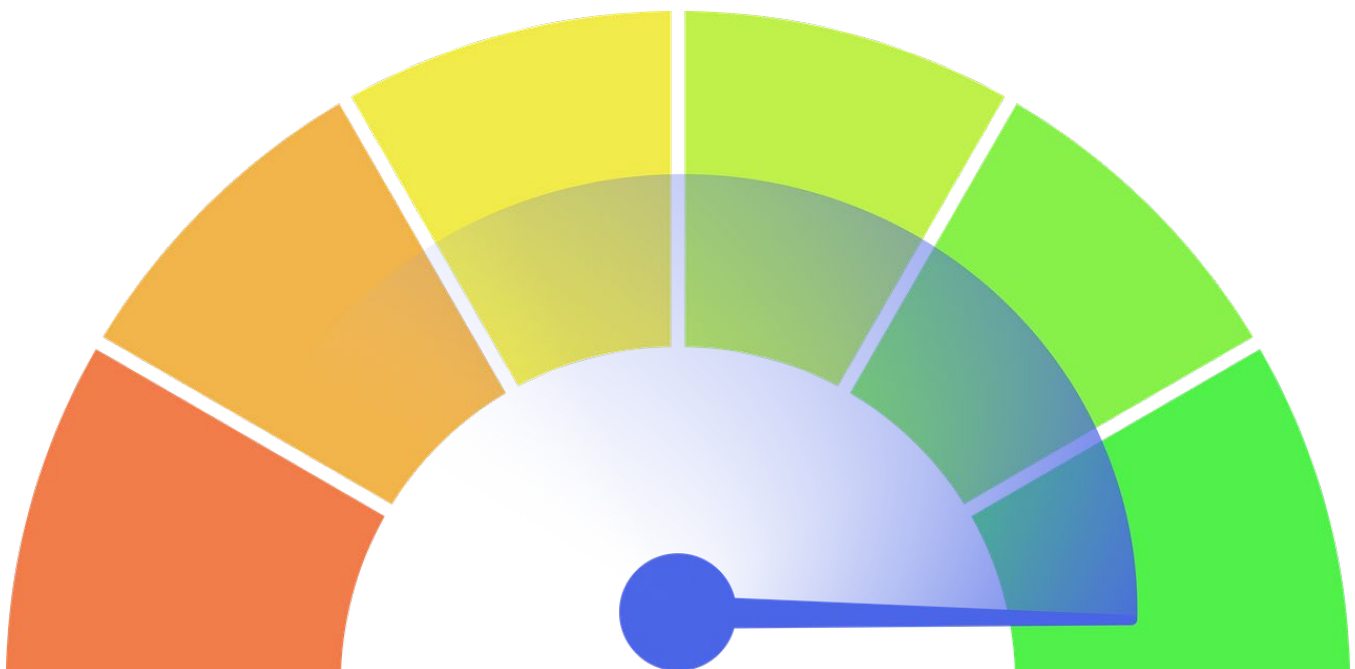
Lack of local awareness of a car share program could lead to under-use, which would be a barrier to the program's success. To ensure success, an outreach strategy must be comprehensive, ongoing, and focused on community trust-building. One method could be participating in community-sponsored events to run interactive, on-site demonstrations where residents could physically see the car share vehicles, download the mobile app, and receive sign-up assistance. Another strategy is collaboration with local employers, colleges, and non-profits to distribute subsidized or sponsored driving credits directly to eligible families, workers, students, and transit-dependent persons. Informational materials could be distributed through local food banks, community centers, and neighborhood association meetings.



MEASUREMENTS OF SUCCESS

Achievement of a breakeven threshold of revenue depends heavily on local demand and site conditions. For car share to be successful, it needs to be in the right location and with easy access to public transportation. The key is selection of strong locations, promoting them effectively, and making periodic adjustments to sustain the program.

Success metrics include usage rate by both car and location, number of active members, hours used and miles driven. Experience has shown that with strong placement, each vehicle may reach a sustainable usage of 6-8 reservations/week and that a successful program is used 35-40% in a 24-hour period on average. This would provide openings for consistent booking and availability since if the vehicle is always on rent then the availability in the app decreases, which could in turn discourage usage.



OPERATIONAL CHARACTERISTICS

Vehicle Placement: High-visibility, secure locations near transit, city centers, or college campuses are proven areas of success for car share programs. In Port St. Lucie, the car share vehicles could reside at the Gatlin/Jobs Express Park and Ride, a regional transportation hub. In Fort Pierce, the vehicles could reside on City property in downtown Fort Pierce. Another possibility, since the area east of U.S. 1 is not served by ART On-Demand microtransit, is the Walton & One redevelopment area.

Technology: All car share reservations and reporting would be conducted using mobile apps or the Internet. Enterprise Mobility support is provided during business hours from a local branch; roadside needs would be 24/7 from an authorized vendor. Zipcar members have 24/7 phone support throughout their reservation periods. Both Enterprise and Zipcar have dedicated car share teams.

Local Staff Resources: Minimal staff time for a host agency would be required to establish or maintain a car share program. Once established, Zipcar or Enterprise Mobility would be responsible for cleaning and maintaining the vehicles, insurance, fuel, administration and general operations. Local partners would assist with parking arrangements. The host agency would maintain a dedicated point of contact to which the car share company would provide program reporting. The host agency could introduce the car share program to community partners and assist with marketing to help make the program a success.



Costs

Zipcar or Enterprise Mobility would seek minimum one-year contracts but could eventually enter multi-year contracts. Zipcar's estimated cost is approximately \$72,000 annually, divided into monthly payments. Enterprise Mobility's estimated cost is approximately \$82,000 annually, divided into monthly payments. These costs are based on four standard sedans; specialty vehicles such as minivans or trucks would incur additional expenses.

Zipcar or Enterprise Mobility would manage vehicle placement, maintenance, repairs, and cleaning in exchange for monthly minimum revenue guarantees. These monthly fees, paid by the host agency, would be offset by revenue generated from member usage. If driving revenue met or exceeded the guarantee, no fee would be charged; otherwise, the host agency would pay the remaining balance. High rider participation has the potential to fully offset the revenue guarantees, which could result in a net-zero financial impact for the host agency.

Existing Programs: Currently within Florida, Enterprise Mobility has a successful private program in Naples; other programs can be found throughout California and the North East. Zipcar operates in Miami, Miami Beach, Coral Gables, Miami-Dade County, Aventura, Fort Lauderdale, Orange County, Orlando, Gainesville, Tampa and at university campuses throughout Florida. Zipcar is the largest car share provider in the United States.

FUNDING

In the past, car share programs nationwide were funded with a combination of state and federal funds. Programs with electric vehicles (EVs), for instance, were funded through federal EV grant initiatives. However, this type of federal funding is no longer available. Therefore, the best remaining sources of funding are state and local governments, non-profit agencies, and public-private partnerships. This section describes the various types of funding that could be available for car share programs.

Government

To qualify for certain types of state funding, a car share program should be included in St. Lucie County's Transit Development Plan (TDP). The TDP, branded Reimagine Transit, is the strategic guide for public transportation over the next 10 years and covers fixed-route bus service and On-Demand microtransit. Because there is no fixed-route bus or microtransit service east of U.S. 1 in Port St. Lucie or in Indian River Estates, two car share vehicles could be installed in a central location to bridge this public transit gap.

Car sharing supports congestion reduction. Therefore, a potential source of funding could be the TPO's Congestion Management Process (CMP). A drawback of CMP funding is that existing projects receive priority, meaning a car share program could receive funding but the allocation could be several years away.

Because car sharing would facilitate out-of-county trips, Transportation Regional Incentive Program (TRIP) funds could be a funding source. The TRIP program supports regional planning, economic growth, and public-private partnerships. TRIP funds target corridors, transit networks, and facilities that cross county lines or heavily impact regional travel, trade, and commerce. TRIP provides up to a 50% state match for project costs. The remaining 50% must come from other sources.

Car sharing supports the mission of South Florida Commuter Services (SFCS) by expanding transportation choice and giving residents and commuters access to vehicles without the full cost of ownership. Research from the University of California at Berkeley found that each shared vehicle can replace approximately ten privately-owned vehicles by allowing households to own fewer vehicles while still having access to cars when needed. This reduces parking demand, makes better use of existing transportation infrastructure, and provides commuters with more flexibility to combine driving with transit, bicycling, walking, or other travel options. Because these outcomes support the mission of the Florida Department of Transportation (FDOT) by improving mobility, expanding transportation options, and ensuring transportation system efficiency, a car share program administered by SFCS would be a strong candidate for FDOT funding.

Public-Private Partnerships

Public-private partnerships (PPPs) could be used to fund car share programs. These partnerships create opportunities for shared investment and shared risk. PPPs support service development and cost-effective operations while maintaining public oversight and accountability throughout a program's lifecycle.

Local law firms, for instance, often invest in billboard space or full bus wraps as part of their advertising strategy. Placing a decal, car topper, or partial wrap on car share vehicles could offer a cost-effective alternative with organic, community-wide reach.

Community-based Foundations

Partnerships with local nonprofits could significantly increase the accessibility and usage rates of car share programs, especially where projects serve elderly, medically vulnerable, or economically disadvantaged residents. Key charitable organizations in St. Lucie County include the Community Foundation of Martin-St. Lucie Counties, United Way of St. Lucie & Okeechobee, and United Against Poverty. The Community Foundation provides funding for community impact projects, including transportation initiatives, especially when tied to broader social and economic needs. United Way, through its Ride United program, subsidizes rideshare trips by

partnering with Lyft. United Against Poverty's purpose is to empower families and individuals to lift themselves to up to economic self-sufficiency.

Mobility Fees

Impact fees, also known as mobility fees, are a one-time fee assessed to new construction, both residential and commercial, to cover the cost of increased infrastructure and services, such as roads, schools, and parks, needed due to the new construction. These fees are paid by developers, not current residents or property owners.

Mobility or road impact fees could potentially be used to support a car share program, if the car share program were formally incorporated into an official mobility plan and tied directly to transportation impact mitigation policies.

CONSIDERATIONS

A Zipcar or Enterprise Mobility car share program with vehicles located in Port St. Lucie and Fort Pierce is feasible and strongly aligned with the St. Lucie TPO's goal of improving transportation flexibility. Successful deployment would depend on participation by a local partner, strategic vehicle placement and robust community awareness efforts. If a car share program is implemented, the TPO would collaborate with the selected car share provider(s), local partners, and the public in the selection of optimal sites. In addition, the TPO could assist with the following efforts:

- **Pilot Program:** Support the deployment of car share programs by host agencies.
- **Performance Measurement:** Establish and monitor performance metrics. Track usage, member growth, and financial aspects.
- **Community Engagement:** Partner with local stakeholders to ensure awareness of the program.
- **Transit Development Plan (TDP):** Facilitate the inclusion of car sharing in the next Annual TDP Update to enhance funding eligibility.
- **Mobility Plans:** Support the incorporation of car share programs into mobility and impact fee plans currently under development.
- **South Florida Commuter Services (SFCS):** Encourage FDOT to fund a car share program administered by SFCS.