SHARED MOBILITY CASE STUDY RESEARCH

A reference document to guide electric vehicle marketing strategy

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Introduction

As shared mobility services generally gravitate towards dense metropolitan cities, the ability to adapt successful marketing tactics to better serve smaller and rural markets will be imperative to ensure economic sustainability of these programs. This research has analyzed marketing precedents that focus on specifically lower income populations. Over the last decade, shared mobility services have been predominantly used by middle to upper income individuals that are well-educated.[1] Because of this, many services have received public funding with the goal of serving a broader membership base by adjusting their pricing,models through marketing, customer service and basic operations.

The research is categorized into "key themes/approaches" that help the reader:

» Break down and Isolate important concepts like "community engagement" its varying interpretations and applications

» Learn how certain strategies and tactics work over time based on the trends seen by the directors of those programs

» Discern the best strategies to advance the uptake of electric vehicles in broader populations which includes dispelling misperceptions about prospective marketing segments and audiences.

Key Themes	Case Study						
	MoGo For All Detroit	Everyone Rides Sobi Hamilton	Indego Philly	Best, Drive, Ever. California	Ithaca Carshare	Slow Roll Nat'l Group Bike Ride	Chicagoland Peer to Peer
Community Engagement & Trust Building	X	X	X				X
Advertising		X	X	X			X
Discounted & Subsidized Memberships	X				X		X
Hands on Interaction				X		X	

Summary Table Showing Key Themes Present in Case Studies

Key Theme/Approach 1: Community Engagement and Trust Building

The first theme, Community Engagement and Trust Building, relates to marketing of shared mobility services with emphasis on building trust in communities that are considered disadvantaged.[2] In multiple studies the need to build agency and trust from within disadvantaged neighborhoods is a critical step in order to adopt new technologies and services.[3] In shared mobility services uptake, community engagement has been utilized to both sell services and inform operations to better serve different populations.

Precedent: Buffalo CarShare

Buffalo CarShare (BCS) was a community focused nonprofit that operated/owned carshare services from 2009-2016. Community trust was built within the service through its many partnerships with community based organizations (CBO). In 2012, BCS secured over 40 CBO partnerships through providing discounts to employees and members related to the groups. BCS provided the know-how on the operations, while leveraging the already built trust that was ingrained within each of the CBO's. BCS viewed these CBO organizations as not only marketing avenues for recruitment, but also as a litmus test on potential new members. The partnerships assisted in bridging the gap between the perception of an intrusive and potentially predatory service, to a beneficial amenity. 50% of members earned $25,000 or less making it the first majority low-income car sharing company in the country.[4]

In a 2013-2014 Journey Access Reverse Commute (JARC) project, BCS partnered with the local biking advocacy organization (GObike Buffalo) and the Buffalo Niagara Medical Campus for $393,432 to perform outreach and marketing for biking, bike sharing (beta), using transit and car sharing with the goal to encourage modal shift and changing transportation behaviour. As part of this project a "Street Team" was hired to canvass low to moderate income neighborhoods and around car sharing hub locations and employment centers in order to educate about new services. The Historic Fruit Belt neighborhood in Buffalo was a major focus of the canvassing campaign. This specific neighborhood has been well documented as having been disenfranchised through racial and economic segregation.[5] The average median income in the area was below the poverty line at $27,000 per year annually. Some key takeaways from canvassing included:

» Modal shift was difficult to measure. The idea of changing transportation behaviour was a longer process than anticipated. Much of the campaign was educating people on the new services and may have resulted in modal shift eventually, but not during the grant period.

» Canvassing for multiple services at once, similar to Portland's Smart Trips[6], was very difficult and resulted in mixed messages and confusion. Introducing multiple new concepts was hard to understand as it may have been information overload.

» Canvassing was complemented by a mailer and other advertisements. The mailer was a good introduction to services, but it was found that many people discarded or ignored the mailer. This could be due to limited interest, poor design, or just being viewed as 'junk mail' in general.

» Door to door canvassing was intrusive to many residents and often canvassers were confused as debt collectors or people looking to purchase property. Canvassers were hired by the community.

» Membership subsidies were a good building block bringing trust to the new technology or service Ambassadors/leaders were identified and partnered with.

» Joining a community event worked much better than creating or 'sponsoring' an event.

Direct results of this JARC funding that relates specifically to outreach, education due to canvassing were limited. The Street Team knocked on over 4,000 doors resulting in interactions with 1,560 residents. Of the 1,560 residents, 280 requested more information about car sharing. This resulted in 15 car sharing members directly joining. After a year of memberships 8 of these members remained active as subsidies included in this campaign went away.

On the other hand, the door to door campaign was very successful for bike and car sharing advocacy. Ambassadors identified within the campaign led to multiple other strategies to better engage the community in future years.

In both Buffalo CarShare and GOBike Buffalo Ambassadors and Street Team personnel became Board Members and Staff for each nonprofit organization.

> ***In Marketing and Engagement, build relationships through already existing and trusted sources. Indirect benefits may be difficult to quantify however shared mobility operators can discern success in these areas by employing survey instruments for qualitative data***

Precedent: MoGo For All

MoGo, Detroit's bike sharing program, has been in operation since May 2017. The City of Detroit worked closely with city officials in Philadelphia in the years leading up to its launch to learn best practices in order to ensure the program was reflective to the city in socio-economic demographics.[8]

MoGo has developed an integrated campaign dedicated to inclusivity called MoGo for All. Under MoGo for All, members can access adaptive bikes, pay with cash, participate in free classes where they also receive a free helmet, and lastly, receive a 93% discount on an annual membership through the Access Pass program.

MoGo's primary marketing tactic to promote the Access Pass is face to face communication through in-person outreach. The MoGo team dedicates a large percentage of staff hours to meetings with social service agencies educating case workers. They also stage events at social service sites to include information sessions, sign-ups, classes and group rides, all of which are free.

One of the most effective marketing tactics MoGo deploys is their Neighborhood Ambassador Program. Details as follows:

» Team of 12-14 ambassadors each summer who are already trusted individuals in their communities.

» Each receives a grant-funded $1,200 stipend.

» They attend 200 events per year, engaging with thousands of people in the communities they live in.

» Offer merchandise giveaways at events like drawstring bags and lanyards.

In July 2019, MoGo partnered with three non-profits to expand outreach regarding the Access Pass. Promotional strategies aimed at reducing the hassle of bike share, for users that had to transport personal belongings. The promotional drawstring bags that MoGo handed out ended up being essential for addressing the issue.[9]



MoGo tabling at the "Open Door" event.
Source: Better Bikeshare Partnership/Mog



Fort St. Open Door Group Ride.
Source: Better Bikeshare Partnership/MoGo

> ***Ride-and-drive strategy for bikeshare promotions had adequate funding coordinated by local organizers. This encourages a core participant base from neighborhoods where service is located.***



Rider who was initially skeptical, averaged 50 rides/week after sign-up. Source: Better Bikeshare Partnership/MoGo

MoGo's Director of Programming and Operations offers more of his insight: "I think the biggest thing I've noticed is that these rather short, but regular interactions have really helped build up the trust that people have in me/MoGo. They've gotten to know me and know that what we're offering is real and not just a short-term gimmick. We did a particularly big push through a mini-grant we received last spring and while that yielded a lot of sign ups, it also took a lot of time. I was visiting each organization either every week or every other week for a few hours for about 2 months. I also spend some time emailing/calling organizations to make introductions and explain MoGo and the Access pass to them"[10] As of December 2019, 21% of all MoGo users are Access Pass holders. This may arguably be the highest in the industry.

Stipend ambassadors carried out in-person outreach and promoted the discount plan.

Precedent: Everyone Rides Initiative, Sobi Hamilton

Funded by the Federation of Canadian Municipalities (Green Municipal Fund), with additional funds from the Losani Family Foundation Fund through the Hamilton Community Foundation, and the City of Hamilton., The Everyone Rides Initiative (ERI) is an equity-based program in partnership with the bikeshare organization Sobi Hamilton, located in Ontario, Canada. Foundational concepts and tactics found within ERI are access, subsidization, education, and outreach. ERI recruits paid community trusted ambassadors within the local biking community and also partners with other organizations to distribute passes. Recipients of the ERI membership subsidy are required to take a "Bike Basics" workshop.



Firas Al Kurdi: Syrian refugee in Hamilton that uses a Sobi Bike to get everywhere at the Sobi announcement event. Source: https://www.cbc.ca/news/canada/hamilton/sobi-immigrants-1.4224503

In 2017, the program launched 12 new hubs in low-income communities and made a public relations announcement that highlighted how bikes are being used as a primary method of transportation for over 60 refugees through the ERI. These refugees were recruited by a customer service staffer who made bi-weekly phone calls to a list of newcomers provided by a local social service agency.[11]

Building trust is a big component of the success of ERI through all aspects of bike sharing. Similar to other precedent, the use of ambassadors located within communities have been used to help educate and promote the service. According to a survey of ERI programs, word of mouth referrals through ambassadors, community meetings and one-on-one relationships have been the most successful in building foundations of trust to recruit members. Moreover, reciprocal partnerships with social service agencies, nonprofits and other grassroots organizations have been vital to building trust with ERI target audiences.

Operationally, Sobi Hamilton was forced to change their model as it relates to the ERI program. ERI is set up to help people in extreme poverty transition from receiving a free subsidy to paying full price through four incremental phases. The way a member is onboarded and treated in a system can better retain membership that are low-income.

According to the ERI Executive Director, Chelsea Cox, it is an organizational goal to help riders understand and appreciate the value of a bikeshare membership once they go through all four incremental phases. ERI rider survey respondents have provided feedback indicating that they understand the value and think the cost is worth it for the service received.[12] Another operational change relates to misuse of the system that traditionally results in financial repercussions. According to Ms. Cox, fines must be handled delicately given the economic constraints of the population. This is usually done by having one on one education interactions that lead to removal of fines.

> ***Local Ambassadors can inform and change operational models to better fit demographic.***



Subsidy Ladder. Source: Chelsea Cox, Exec. Dir. for Sobi Hamilton

Precedent: Chicagoland Peer to Peer Car Sharing Pilot

The Shared Use Mobility Center partnered with private peer-to-peer car sharing company, Getaround, to launch a car sharing pilot in Chicago from August of 2015 through October 2017. The purpose of the pilot project is to research how peer-to-peer car sharing would function in different urban and socio-economic contexts while also encouraging more vehicle owners from the pilot zones to list their cars on the Getaround platform. The study took place in three distinctive neighborhood types, mostly located in the central part of the Chicago Metropolitan Region:

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

Focus groups were conducted with renters and owners from pilot zones as part of the project's research activities. Some participants were hesitant to join Getaround because they were not familiar with the platform through any marketing or outreach practices (transit advertising was not introduced until the end of the pilot period). When introduced to the concept, focus group participants thought the program "seemed sketchy".

Some also suggested that Getaround open a brick-and-mortar store so as to have a physical presence in the region to help people understand the concept. Getaround, a venture capital based car sharing organization, focused expansion of services nationally by quickly gaining market share in many metropolitan areas. Similarly to Zipcar, local offices were not part of their business expansion model.

Also during this pilot period, Getaround conducted their own research and found that on the ground campaigning gave a face to the company, which made potential participants more curious than apprehensive. It was found that personal interaction at street festivals and farmers markets to be important for onboarding owners and addressing their concerns.

> ***Program struggle without built- in trust. One-on-one organizing strategies can dispel apprehensiveness to participate. Strategies for engagement and marketing efforts need to pre-emptively address the perception of "scams" an issue often voiced in focus groups. Funding allocations should favor these opportunities over non-interactive means where possible.***

Precedent: Community Organizing Models

Community outreach can take various forms and certainly can mean different things. For this paper, community outreach means direct interface between a CBO, trusted local community advocates, local social benefit groups and political champions and residents of the community where the shared mobility services are available. Further, in this context the outreach team or entity would be working closely with the car sharing service before launch and throughout operations, either contracted by or co-funded with the car sharing service.

Effective community outreach models go hand-in-hand to and most times informs the communications, ads, and overarching marketing strategy. Trust and clear understanding of the shared mobility services remains unequivocally the most important outcomes of the outreach work. For both Ecosystems and CSMN projects, the community engagement team launching the service works pre and post launch with the operator to develop a plan in concert with marketing efforts. This model also occurred in the Blue LA model but was less integrated with the marketing decisions of the car sharing operator. MOGO, Buffalo Carshare, Ithaca Carshare, Slow Roll and Indiego all utilized integrated outreach and marketing strategies.

Precedent: BlueLA

BlueLA is a 100-vehicle EV Carsharing service in Central Los Angeles, and the largest Clean Mobility Options program supported by the State of California. BlueLA launched in 2018 after two years of planning with the City of Los Angeles and three community based organizations: the Koreatown Immigrant Workers Alliance (KIWA), Trust South LA, and the Salvadoran-American Leadership and Educational Foundation (SALEF), which formed a Steering Committee for the project. All three of these organizations had different strengths to add to the project (immigrant organizing, community-led planning, and social services/advocacy, respectively) and each saw the program as an extension of their organization's mission. A detailed Memorandum of Understanding was established between the organizations and the City of Los Angeles outlining roles and responsibilities.

Ultimately, the program recruited over 3,000 members in the first year of service, and over half of program participation came from low-income users. Unfortunately, a number of disconnects between the operator (BlueLA) and

these CBOs led to a breakdown of the outreach work and, ultimately, to serious distrust between these parties. In short:

» These CBOs were less interested in performing outreach than in advising and training the operator in outreach. This work was understandably more "service-oriented" than two of the three CBOs,and stretch the resources of small organizations.

» BlueLA staff had expectations that CBO participation would lead directly to membership recruitment, and evaluated the partnership on this basis.

» Both the operator and the CBOs lacked staff that "spoke each others' language" and lack of cultural competence on the part of Blue staff exacerbated tensions. Distrust of the private operator on the part of the CBOs was also built into the organizing "DNA" of community organizers.

» Without strict guidelines or oversight of the marketing work on the part of the City of LA, the operator and community partners had very different perspectives on how the marketing and outreach budget should be spent.

In hindsight, some of these tensions could have been addressed more clearly from the start of the project, while others were a function of larger dynamics that exist in public private partnerships. Within the context of the San Joaquin Valley, lesson to take forward include:

1. Be prepared to invest, knowingly in the organizational mission of CBOs that are pulled into these projects. Make sure, on the other hand, that these organizations are aware that service may require support that goes beyond their experience.

2. Invest also in an intermediary between the operator and the CBOs that can balance the interests of membership recruitment and community organizing. Both the operator and the CBOs should recognize and expect that this liaison will hold their organization accountable. This liaison should be empowered and comfortable with making management decisions around the outreach work on the basis of whether both the operator and CBOs are accountable.

3. Where possible, structure outreach around a program design that retains community control of the program. CBOs will be more trustful of the program and more willing to participate if it is community-owned.

Theme Summary

Building trust through patient community engagement is a critical component in successfully introducing new services and technologies to disadvantaged and underserved communities. In order to build trust, adequate resources need to be dedicated not only to market new services, but to maintain users past the intake process. Partnering with CBO's, nonprofits, and bringing local ambassadors into the fold from the beginning is important. Direct outcomes (i.e. increased membership) from investment in building trust may not be as easily identified as it is a longer process than traditional marketing tactics. This means focusing real program budget on:

» Recruiting community-based organizations (CBOs) to participate in the program design. CBOs should have a meaningful role in making decisions on program pricing, branding, membership qualifications, and other aspects of the service prior to advising outreach.

» Setting clear expectations for outreach efforts and having direct conversations with CBO partners at the start of the project about outreach activities to be conducted.

» Recruit a mix of CBOs if possible, both those with a background in community organizing and social service delivery.

» Supporting holistic program outreach for partner CBOs, with an understanding that the program will likely be communicated as part of a suite of programs that a CBO brings to or champions within the community.

Key Theme/Approach 2: Advertising

In this theme, research will focus on paid advertising as it relates to shared mobility modes. For general understanding, research from TRP in 2005 showed that members who joined carshare interacted with multiple forms of paid and organic advertising. This is usually coupled with a 'trigger event' that may push the person to join. For example, a car breaking down.[13] On the other hand, bike sharing membership intake is slightly different as the vast majority of users joining are point of sale interactions from seeing a station location or bikes that are located around more densely populated areas. Paid advertising is less of a factor as the location of bike share sites are naturally advertising the service (like miniature billboards). To be more inclusive, bike sharing operators have done advertising campaigns that focus more on disadvantaged communities as the vast majority of users are wealthy and white.[14] [15]

Precedent: Indego Bikeshare

Philadelphia launched Indego in 2015, and currently operates over 1,000 bikes in over 130 stations. The City of Philadelphia is a leading participant in the Better Bikeshare Partnership, a collaborative project in which the primary goal is to build equitable and replicable bike share systems. Other partners in this collaboration include the Bicycle Coalition of Greater Philadelphia, the National Association of City Transportation Officials (NACTO) and People For Bikes.

Indego is one of the first bikeshare programs to have a complete media campaign that includes radio, TV, billboards, and social.

The Faces of Indego Campaign features real Indego users with statements that they generated about how they use the system in both English and Spanish. Complemented by providing discounted passes (Access Pass), the campaign was developed after Indego conducted a series of focus groups of low-income Philadelphia residents and people of color who were identified as potential bikeshare users. The focus group had a general consensus that people who bike are among groups like young professionals in their 20's and 30's, tourists, college students, the environmentally conscious, people who like to exercise and hipsters. The group ultimately determined that in order to get other demographics to embrace bike sharing, advertising and marketing would have to be more representative of specific demographics.

Details of the findings concluded from the focus groups regarding marketing and advertising include the following:

- African American females specifically wanted to see other African American women and families using bikes.
- Participants suggested showing people of all sizes, including overweight riders, in order to inspire others to take advantage of biking for the health-related benefits.
- Showcase people from all walks of life and both low-income and high-income backgrounds.

Focus groups guide marketing, Campaigns need adequate allocations to do marketing with testimonials as a centerpiece. Marketing can be a 2-way street: while expensive, ambassador programs to build trust and encourage a level of community design.

When asked about the reasons for not wanting to use a bikeshare bike, participant responses included:

» Bikeshare is not available to kids and thus not available for families. Many women of color spend a lot of time driving to and from their kid's activities and bike sharing is not family friendly.

» Participants felt unsafe in certain neighborhoods and riding with traffic.

» No stations located near work or home.

» Some participants saw bike sharing as a positive service, though could not imagine people from their own neighborhoods using the bikes.

» As pedestrians and drivers, some of them are annoyed by cyclists riding on the sidewalks and almost hitting them, and think bike lanes are a nuisance.

» One participant said they "wouldn't want to be caught dead on a bikeshare bike because of how awkward it looks". Despite this, a majority of women were not concerned with how it looked, just how it functioned.[16]

Some other relevant conclusions from the focus group facilitators:[17]

» Promote bike sharing through Craigslist - there are many low income individuals on the site.

» The attitude around and culture towards biking and bike sharing in low-income neighborhoods needs to fundamentally shift.

» Increase visibility in certain areas by recruiting ambassadors.

» Offer community courses to teach about bike safety and offer bike trials.

» Make safety and the promotion of safety a major priority .

As of December 2018, 2,800 people have purchased the access pass logging over 140,000 trips. In total 45% of members make $35,000 or less. [18] [19]

Boots-on-the- ground results in more community trust not necessarily more members; ad campaigns translated to member aquisition. Both are needed in tandem.

Precedent: Buffalo CarShare

Buffalo CarShare (BCS) obtained grants and political discretionary funding to advertise car sharing on bus shelters, trains, busses and on the radio. Advertising focused on low income residents, specifically residents that do not own a vehicle. car sharing members that participated in assisting in the campaign with modeling, voice acting, and critiques, were provided a free month of service.

Public Transit Campaign:

» In-bus advertisements saw limited direct signups. After evaluating, it was determined that placement of advertisements were not located in the line of site of bus riders when sitting. Moreover, unlike train ads, it was not possible to direct bus advertisements on select routes as buses rotated daily on new routes. This resulted in mis-targeted advertising impressions as most routes were not near car sharing hubs.

» Light rail advertisements fared better. Buffalo's Metro Rail is a one-line 6.4 mile system that supports 5.5 million riders annually. BCS advertised locations of vehicles/offices as it relates to train stops. See below advertisements.

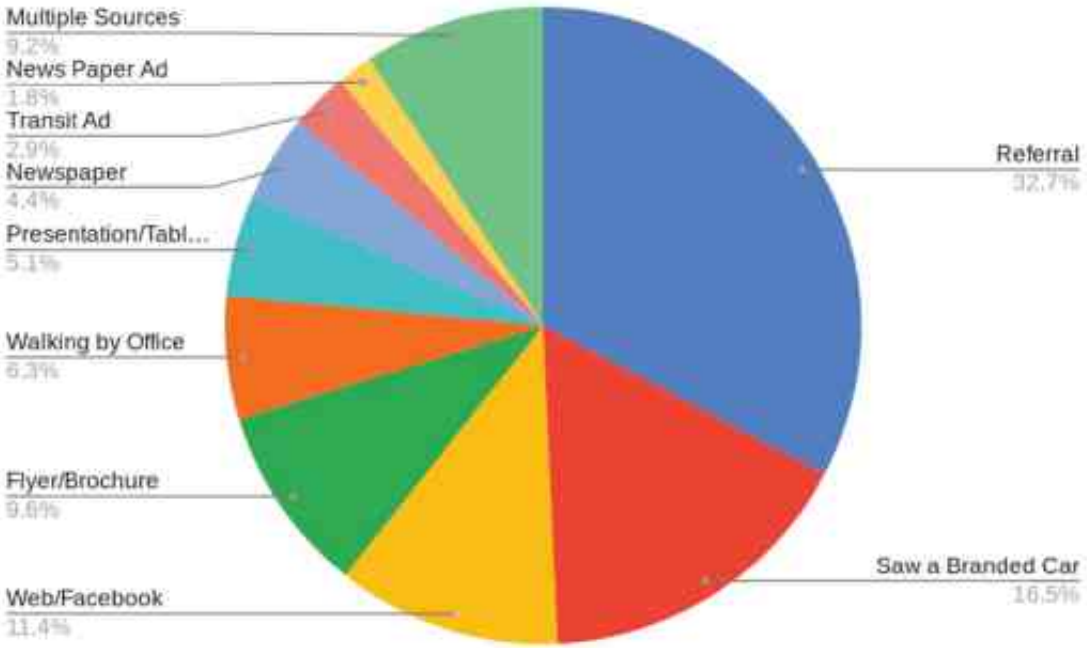
» Bus shelters were also advertised on. Bus shelters advertising costs were dependent on the amount of vehicles that passed by an intersection (not the number of bus riders who are waiting in the shelter). Essentially, advertisements on bus shelters focused on car drivers, rather than people using the bus.

» Radio advertisements were used, but had limited impact as BCS target audience were people who didn't own a car. Radio advertisements are generally focused on people in cars.[20]

Item	Estimate Cost	Estimated Duration	Members Directly Joining
Door to Door (Staff, Print)	$23,000	6 months	15
Transit Advertising (Design, Advertising)	$11,000	8 months	41

Members who directly joined used a promo code.

Some of these transit advertising campaigns complemented the outreach and door the door canvassing as stated in Theme 1. The campaign results for car sharing is as follows:[21]



How Members Heard of Buffalo CarShare

Further breakdown on marketing of Buffalo CarShare yields these results through membership surveying in 2015.[22]

Lessons learned:

» Physically see where the advertisements are going before purchasing ad space

» Have a small focus group guiding the design process. This group can assist with adjustments in final design to assure the feel of the advertising is right . Buffalo CarShare advertising campaigns utilized community members as their models, but did not utilize a focus group on the final product design. Certain wording, design aspects could have been adjusted to better advertise to the community. Words, phrasing, tags and visuals that describe the system that appeal to the target audience.

» Radio advertisements were experimented with and were not successful.

» Advertising complemented a door-to-door education and canvassing campaign (see Theme 1).

> ***Direct benefit of advertising may be better than building trust in the short term, but doesn't mean it is in the long term.***

Precedent: Best.Drive.EVer Campaign

Best.Drive.EVer (BDE) in 2017 was an enhanced ride and drive program consisting of a California statewide campaign, along with additional small grant partners, focused on increasing electric car awareness and adoption across the state. The BDE program provided consumers with the opportunity to test drive the latest electric cars at consumer friendly events. Over the course of nine months, BDE events were held at 13 different venues, over 18 days, and reached low income and disadvantaged communities that are typically underserved with electric car events and outreach. [23]

» It is estimated that over 150,000 people were exposed to the BDE campaign at high profile events such as EV Week, SF Auto Show and the LA Auto Show.

» Facebook Ads ran for 7-10 days prior to each event, and usually included the images or event flyer and/or promotional materials and photos.

» Over 20,000 Facebook followers were reached during these events, with 2000 post engagements.

» At the State Fair, the Cal Expo Digital Billboard advertised the SMUD/Veloz ride and drive over three days; in Bakersfield, TV and radio spots ran in the local markets; and a press event was held at the opening of EV Week in San Francisco.

» The San Francisco Chronicle Auto Show insert, which ran over the Thanksgiving holiday, included a listing for the ride and drive.

» All events had staff distributing flyers to passersby and attendees; most events had giveaways in the form of food vouchers, auto show tickets, and free tacos. BDE logoed nylon shopping bags were also given away to attendees at all events.[24]

> ***Looking at impressions and attendance, the combination and sequence of social media, Marketing and Ride N drive interaction together is very successful. The downside to any test drive concept is the inherently temporary engagement. The goal would be to build off this concept and approach by offering prospects an extended opportunity with EVs applied to for example, a shared mobility service.***



Precedent: Car2Go

Car2Go is a one way car sharing service that allows users to take cars from general geofenced locations and return them to any other location. Car2Go ran a national campaign in 2013 featuring real customers relating stories of how the service fits into their lives, including one that featured how Car2Go was handy for getting a pregnant mom to the hospital and another that features a 290-pound strongman who uses the cars for errands.

Car2Go partnered with Edelman Austin and Chicago, a Public Relations agency along with United Entertainment Group to implement street team activations on the company's launch in Chicago from July-August 2018. Over 30,000 people visited installations and activations in this creative, experiential, out of home campaign.

» Street teams were deployed at high-traffic festivals and events, like music fests and beach volleyball tournaments.

» Local acrobatics team along with many local influencers promoted the launch.

» Local artists created art installations.

The Car2Go campaign led to more than 45 Chicago-specific media placements. The campaign was covered by the Chicago Tribune, Inside Hook Chicago, 97.1 The Drive, and WGN.com. Over 30,000 Chicagoans visited Car2Go installations and activations throughout July and August, with over 18,000 Chicagoans receiving company swag.



"Even before Car2Go launched in Chicago in July, Car2Go's app was opened over 10,000 times each month, or about 360 times each day, by Chicagoans looking to access the service," added Nehrkorn.[26]

Viral taglines and memes, fun and quirky works. Even though service is no longer in Chicago, for overriding reasons. Quote says it all.

Precedent: Reddy Bikeshare

Reddy Bikeshare is a non-profit bike sharing organization that launched in Buffalo, NY in 2016, with 200 bikes in about 40 stations. A marketing grant from Empire State Development was awarded to Reddy Bikeshare with the goal to spur economic impact in Western New York through bicycle tourism in 2017. Partner organizations included in the project were GObike Buffalo, Slow Roll Buffalo, and Visit Buffalo Niagara.

The team's objectives were to reach target audiences by highlighting the attractiveness of exploring the region by bike, to promote cultural and recreational destinations and amenities, to communicate opportunities to participate in biking events/conferences, and market the ability to easily rent a bike. The grant required that the partner organizations hire an outside agency to facilitate the campaign's creation of content and media buys. The agency chosen produced a marketing and advertising campaign using billboards, radio and social media advertisements.

The objective of the media campaign was to target Western New Yorkers and out-of-towners visiting Buffalo to create awareness of bike tourism opportunities locally. The partner agency conducted research on the target audience demographics and their media consumption habits and recommended that ads on Facebook and Instagram be utilized in addition to a billboard campaign.

Facebook and Instagram ads can be further targeted by the likes and interests identified from information users have added to their timeline, keywords associated with the pages they like and Facebook ads they have clicked on. Utilizing this information, the partners ran highly targeted image/text ads that appear while users browsed the social platforms across all devices. Social media ads used geotargeting to reach visitors that were in town as opposed to targeting outside markets.

Biking demographics in Western New York statistically leaned toward people who are white and affluent, so with an equity focus in mind, it was important to the partner organizations to feature a variety of different races in the ads and videos.

It is estimated that the campaign's total impressions reached 6,782,517. Below is the data associated with the campaign:

- Social media advertisements on Facebook and Instagram: $30,000
  - 1,036,196 total impressions, 9,198 clicks to website, 26,300 video impressions
- Billboard and radio advertisements: $40,000
  - 5,760,913 impressions (estimated)

Social media advertisements were segmented by demographics, such as age, interests and where they lived. Many of the video advertisements used in social media have been reused in other campaigns.

Billboard and radio impressions were estimated based on traffic counts and average listening audience. Unlike social media advertisements, there were limited avenues for marketing segmentation. Other than videos and some newsletter templates created for an annual National Bike Month campaign, all advertisements could not be reused.

It is difficult to evaluate the effectiveness of a marketing campaign when it comes to changing behaviour since marketing campaign effectiveness is ultimately measured by impressions only.

According to a Reddy Bikeshare:

» If working with an agency, work with one that is trusted to represent your brand, perhaps one there is already an established relationship with, and that knows the organization well.

» Billboards did not seem like an effective way to promote biking. Conversions are impossible to measure, impressions were an estimate. Arguably the most effective part of the billboard campaign were the connections made with local cyclists to produce the content for the ads. The cyclists were excited to see themselves on billboards around Western New York and shared photos of themselves on social media.

» A grassroots marketing effort, or street team, could have supplemented the campaign well. Ads alone are less effective, especially if changing behaviour.[27]

» Group rides were effective as it spread word of mouth and broke down perceived barriers to riding a bike.

Precedent: Chicagoland Peer to Peer car sharing Pilot

As referenced in Theme 1, The Shared Use Mobility Center partnered with private peer-to-peer car sharing company, Getaround, to launch a car sharing pilot in Chicago from August of 2015 through October 2017.

While Getaround marketing relied on digital advertising, and in general designs its advertising with a fairly tech-savvy user base in mind, the pilot chose to adjust marketing to focus more on grassroots marketing strategies, such as tabling at street fairs, farmers markets, and community centers. SUMC and Getaround representatives attended 40 tabling events across the last two years of the project. To try to build on this outreach, the pilot also invested $3,000 into digital and print advertising in local newspapers. Total advertising and outreach in the focus zones equaled $16,710.[28]

Research through focus groups, interviews, and surveys were conducted throughout the project and one consistency was found Getaround's marketing to be lacking and unrelatable.

Not too much funding going to build change. $13K going to marketing is not substantial. Also seemed like lipstick on a pig.

Precedent: Everyone Rides Initiative, Sobi Hamilton

Per Theme 1, Sobi Hamilton's ERI program also pushed traditional advertising tactics to complement their trust building ambassador programs. Key takeaways through ERI survey included this in advertising:

» Direct mail did not work, and was seen as junk mail.

» Word of mouth was the most influential way to get members.

» Newsletters, occasional PR, tabling at events also were used and effective.

» Utilizing already existing infrastructure (racks/bikes) to promote the program through signage was an easy tactic.

» Billboard ads were not considered because of cost and estimated impacts.

Advertising and outreach complemented each other

Precedent: Zipcar

For profit car share companies like Zipcar have moved almost completely to digital campaigns - revolving around web and social media marketing, this is especially true in their smaller markets.

Digital Marketing most cost effective.

Precedent: LyftUp

Lyft partnered with celebrity spokesperson, Lebron James, and his athlete empowerment company, Uninterrupted, for a new initiative called LyftUp that will connect communities in need through bikeshare access. In collaboration with the YMCA, the program will give one-year bikeshare memberships to thousands of young people in New York City, Chicago, and the San Francisco Bay Area.

The campaign was announced with the release of a YouTube video narrated by Lebron James that features skilled teenagers of color biking in and around their community. In four days, the video had over 100,000 views. While the success of this campaign cannot be measured yet since the announcement is so new, this is the most "viral" campaign to date for bikeshare equity programs.[29]

> ***Viralness = big membership acquisition. Look for popular influencers to elevate your membership campaigns.***

Theme Summary

Traditional advertising, PR and marketing techniques are critical for the development of shared mobility services in disadvantaged neighborhoods. Having community groups help guide the process of developing advertisements may help in the amount of return on investment on advertising. Local steering committees have been successful in this process. Figuring out the right balance between advertising a catchy services in comparison to social service is critical to a good campaign (marketing people who want something is completely different than needing/owed something)

For shared mobility specifically, advertising on transit has been a good tactic if the cost and if it is deemed that the market segmentation is correct. In small and rural areas, or areas that public transit is not used at high volumes, marketing firms should look at ridership and travel patterns before investing in that medium. Billboard campaigns for small nonprofit or independent businesses are rare and are usually funded by outside sources. For profit car share companies have switched to mostly digital advertising due to impacts. Moreover having an active social media presence that builds local audiences.

Key Theme/Approach 3: Discounted and Subsidized Memberships

In this theme, research will focus on the utilization of subsidies and discounts as a way to encourage membership. This type of methodology is very common in all forms of shared mobility especially when focusing on disadvantaged communities. Discounts and subsidies are usually funded by government or other grant giving organizations in order to be better inclusive by removing financial barriers to enter a program.

Precedent: Buffalo CarShare

Through federal JARC funding, Buffalo CarShare provided free monthly memberships to complement a marketing and outreach campaign. This provided a lower barrier to entry to try the program. Initially well received, when funding was exhausted to provide the subsidized memberships it resulted in low membership retention. Anecdotal information provided by Buffalo CarShare stated that building trust, teaching members about billing, and accepting different payment methods were much more influential (and sustainable to maintain membership) than providing a free membership. Besides for this one year of JARC funding, Buffalo CarShare costs were not subsidized based on income, as they felt it was more impactful to adjust operations, customer service and marketing. Buffalo CarShare is considered one of the only car sharing services that the majority of its users came from low-income households.

> ***When operations facilitated low income membership, subsidies as a marketing tool were unnecessary. Marketing channels could focus on the fact that BCS was more competitive and better product.***

Precedent: MoGo For All

As stated in Theme 1, MoGo is Detroit's bike sharing program that utilizes an integrated campaign dedicated to inclusivity called MoGo for All. Under MoGo for all, members can access adaptive bikes, pay with cash, participate in free "Street Skills" classes where they also receive a free helmet, and receive a 93% discount on an annual membership through the Access Pass program. The Access Pass is a $5 annual pass for registered members of the following state benefits programs: Food Assistance, Cash Assistance/Family Independence, Healthy Michigan Plan, Children's Special Health Care Services, and Child Care Assistance. Cash payments are available for this program through a partnership with PayNearMe, where payments can be made at 7-Eleven, CVS, and Family Dollar. This access pass complemented outreach and marketing stated in other sections. Similarly to Ithaca Carshare and BCS, MoGo, did a lot to adjust operations to facilitate financial sensitive users.

Precedent: Ithaca CarShare

Ithaca CarShare is a non-profit car sharing organization that began in 2008 in Central New York. Ithaca CarShare offers an Easy Access Program in which payment can be made by credit or debit card or other pre-pay methods by people who earn a gross income at or below 150% of the federal poverty level. Participants in SNAP, free or reduced school meal programs, or subsidized health insurance generally qualify for the plan and thus are target audiences for the program. The Easy Access plan offers a lower hourly rate and a lower monthly rate than other Ithaca Carshare plans.

Ithaca CarShare has also taken advantage of strategic partnerships and access points. Ithaca Carshare formed a unique partnership with a local community development credit union, allowing members that do not have a debit or credit card the opportunity to deposit funds into a special account. Once deposited, Ithaca Carshare applies the funds to the specific member's account to cover membership and usage costs. This credit union already has an array of financial services and products to support financial literacy and independence among those with lower incomes, and is willing to co-market services with Ithaca Carshare. One example of this is working with the credit union's free income tax preparation service as a way to reach those who might otherwise spend their "windfall" tax refund on less cost-efficient transportation, for instance a new car. [30]

Precedent: Chicagoland Peer-to-Peer car sharing Pilot

Owners from the low income market expressed frustration about the high cost associated with listing their vehicle, especially because this cost did not apply to renters. In the final stages of the program, Getaround dropped its $20 monthly fee which had a clear and immediate impact on sign-up rates.[31] It is unknown how members were retained after this, or if subsidies remained after funding.

> ***Giving out free memberships may lead to more people using service in the short term; however strategy and spend should aim toward sustained membership, and the requisite trust building to do so.***

Precedent: Food Cooperatives

Maintaining discounts and/or providing discounts may be difficult after funding is exhausted. The Central Brooklyn Cooperative, Sacramento Natural Foods Coop and multiple other food cooperatives provide access to the food coop (and the discounted prices) in return for monthly volunteering hours. Members have the option of paying or volunteering in order to have access to the cooperative. By doing this, the cooperative saves money on operations and results in maintaining discounted food for members.[32] Adjusting operations to provide discounts without outside funding was a key approach.

Precedent Boston Bluebikes (formerly Hubway)

Boston BlueBikes launched in July 2011 and currently the system has over 3,500 bikes at 325 stations. The program offers discounted memberships through the "SNAP Card to Ride" program, which provides $5 monthly memberships (a 75% discount) and $50 annual memberships (a 49% discount) to individuals over the age of 16 with their household EBT card. The membership includes unlimited 60-minute trips, rather than the current 30-minute trips, without additional usage fees.[33]

SNAP Card to ride was announced in January 2018, building on the long-running reduced cost membership for income eligible residents who may or may not be on public assistance. There is no difference in cost with the SNAP program and the long-running program. The income eligible program requires in-person guided enrollment whereas enrollment in the SNAP program can be done online only if you have a credit or debit card, otherwise this has to be done in person.

In February 2018, one month after this announcement, a Harvard student published testimonies from low-income Boston residents in the student newspaper who have never used Hubway (Bluebikes) and doubt its affordability. The article demonstrates that there is a perception among people in low-income neighborhoods that bike share is inaccessible to them in Boston, determining that better marketing and access to bikes is needed to reach these individuals.[34] A scorecard compiled by PeopleForBikes, a national bike advocacy organization, gives Boston a 2.7 out of 5, with particularly low ratings on two metrics: "network" (how well the bike network connects people to destinations) and "reach" (how well the network serves everyone equally).[35]

Boston is slowly progressing in its ability to provide bike share options to people of low-income communities through discounts and expanded stations, though media interviews with low-income residents and local bicycling advocates indicate that there is a disconnect between the program and the people it aims to serve because of lack of engagement, especially in the program's early years.

> ***Program subsidies alone can't overcome the barriers of underlying circumstances: deploying subsidy tactics can be tone deaf in disadvantages communities where shared mobility services and infrastructure are scarce, creating a mismatch between the ingrained culture realities and the service.***

Precedent Austin B-Cycle

Austin B-Cycle provided subsidized memberships similarly to many other programs all over the country. One thing to note, is after funding was exhausted, the vast majority of people who utilized this discount for membership did not maintain membership to the program one year later. The retention drop off could be because of multiple factors including the removal of a discount.

> ***Grant funded discount membership strategy with outreach component and equity focus was an ideal approach; however after using up the grant funds the equity program essential disappeared.***

Theme Summary

Subsidies as a stand alone strategy very rarely yield sustained membership in shared mobility systems. Subsidy tactics launched in communities where other systemic or cultural barriers stand in the way of membership and utilization can create brand confusion and disincentive. Where operations lend themselves to low income membership - that is inherently affordability, membership can be sustained. Limited promotions, combined efforts and discounts that align with longer term membership acquisition strategies offer the most value.

Key Theme/Approach 4: Hands on Interactions

In this theme, research will be focused on marketing tactics that push hands on interactions with the services. Multiple studies relating to hands on interactions with new technologies and services is a valuable way to provide general awareness and build a relationship between product and consumer as new technologies. This is a form of experiential marketing.[36] Ride and drive, tabling, and demonstration based events are some key tactics that are in this theme. [37] [38]

Precedent: Best.Drive.Ever Campaign

As stated in Theme 2, Best.Drive.EVer in 2017 was an enhanced ride and drive program consisting of a California state-wide campaign, along with additional small grant partners, focused on increasing electric car awareness and adoption across the state.





Ride and Drive Events under the Best Driver Ever Campaign

A total of 2,344 ride-and-drives were completed. Post survey data shows an average of 1.48 ride-and-drives per respondent. Survey results indicate that 84% of respondents had a very or somewhat positive perception of EVs before a test drive which increased to 93% after a test drive. In the three-month follow-up survey after each event, 78% of respondents shared their EV experience with friends and/or family, and 33% shared it with co-workers. In addition, after the event, 60% of respondents looked at EVs online, 22% visited an EV dealer, and 46% talked to an EV owner. On average, 10% of respondents purchased or leased a PEV, including the following vehicles: BMW i3, Chevy Bolt, Chevy Spark, Ford Focus, Ford C-MAX, Nissan Leaf, Subaru Impreza, and a Tesla Model 3.[39]

This campaign is a good example of creating awareness of a new technology and new service.

Precedent: Bike Tours, Slow Rolls, Group Bike Rides

Common and influential tactics for building communities' trust as well as marketing a service is the ability to provide hands on interactions. For biking, providing someone with a group experience helps to break down barriers that previously prevented them from joining a bike share program or even riding a bike through a city. Slow Roll, a Monday bike ride in many metropolitan cities, provides the ride-and-drive concept on a larger scale, but for biking. According to Slow Roll Buffalo website, "The purpose of Slow Roll is to present a free and open event that encourages people to get together on their bikes and see the city at a slower pace, enabling a better appreciation of our people and places. In the process, we connect with countless community stakeholders to share the ongoing story of our city" [40] [41]

The direct impacts of the coming together of people to go on a group bike ride are more qualitative than quantitative, but to date Slow Roll Buffalo has facilitated over 102,000 total individual rides. According to Slow Roll Buffalo's Director of Strategy, Thea Hassan, "about 30% of riders stated that Slow Roll helped introduce the idea of biking in an urban environment, and therefore the potential to change transportation behaviour within our city may increase."

Furthermore, when Slow Roll Buffalo received pushback from residents of historically disenfranchised neighborhoods, the communities in which the ride traveled through, Slow Roll Founder, Seamus Gallivan, and volunteers quickly developed a new strategy. "Slow Roll has built bonds and trust in marginalized neighborhoods mainly by inviting residents to participate, not only in our rides themselves, but also the planning and presentation of them, along with showing up at their gatherings, supporting their initiatives, and occasionally sharing proceeds of our after parties. By sharing space in these ways, we achieve mutual understanding and receive reciprocal support." [42]

From a massive bike ride like Slow Roll, to smaller group rides, bike sharing providers have been utilizing group rides as a way to build community, remove fear of riding, and sell the idea of using the service as well.[43] The combination of hands on interaction, the structure of engagement resulted in empowering people to be part, and mold the tone of the event. This ultimately led to the sense that organizers successfully built trust through the events.

Theme Summary

Ride-and-drive tactics have been employed over the last decade to remove barriers introducing new technologies to populations. Similarly to building trust, this tactic may not have direct financial benefits or singularly result in new memberships, but does provide the ability to educate and remove stereotypes relating to the new technology/service. If done correctly and in concert with trust building, marketing and advertising tactics, this technique has provided an additional way for potential buyers/users to interact with the technology.

Conclusion

When creating a marketing and advertising plan for shared mobility, especially in disadvantaged communities, a combination of all themes has been seen to be the most successful way to bring in new members. Many of the successful precedents highlighted in this paper rely on a blend of the key themes/ approaches we've identified.

Quality shared mobility services, especially electric-vehicle based, must adapt to better operate with new clientele that may not be considered the 'traditional' shared mobility/EV user. That will include the key components of cost structures, marketing plans, and customer service. Operations looking to make the biggest impact in disadvantaged neighborhoods must respond to historical socio-economic constructs of these populations. Program ambassadors, CBOs, nonprofits and other local leaders are not only acting to assist in marketing products/services, but also designing and implementing a new paradigm on how to effectively serve a broader community of users.

ABOUT SHARED MOBILITY

Shared Mobility Inc. (SMI) is a transportation nonprofit that focuses on cutting-edge technology and best practices to build mobility systems that are tailored to underserved communities. SMI's work often focuses on markets that are not traditional and may not yield financial margins that would satisfy a for-profit model. We believe that access to affordable and environmentally friendly transportation options is a human right.

Founded in 2009 as Buffalo CarShare, SMI has transitioned to work across the shared mobility spectrum that utilizes electric cars, vans, bikes and other micro-mobility devices. Our goal is to not only create long term sustainable operational models using public-private-nonprofit partnerships, but also adapt best practices to better suit communities needs.

Endnotes

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2 Disadvantaged communities refers to the areas throughout California which most suffer from a combination of economic, health, and environmental burdens. These burdens include poverty, high unemployment, air and water pollution, presence of hazardous wastes as well as high incidence of asthma and heart disease. www.cpuc.ca.gov/discom/

3 Johnson, Devon, David B. Wilson, Edward R. Maguire, and Belén V. Lowrey-Kinberg. 2017. "Race and Perceptions of the Police: Leung, Carolyn: A Community-Building Strategy in Low Income Neighborhoods, Greenlining.org, communitychange.org

4 Interview Michael Galligano, Buffalo CarShare

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6 https://www.portlandoregon.gov/transportation/43801

7 References Interview Jamie Burney BNMC, Interview Michael Galligano, Buffalo CarShare, JARC final report.

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9 http://betterbikeshare.org/2019/08/12/detroits-mogo-connects-homeless-individuals-to-bike-share/

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17 http://betterbikeshare.org/2016/08/29/philly-offering-bike-share-discounts-food-stamp-cards-working-great/

18 https://patch.com/pennsylvania/philadelphia/electric-bikes-coming-phillys-indego-bikeshare-program

19 https://peopleforbikes.org/blog/show-dont-tell-indego-strives-for-inclusion-in-advertising/

20 All information from, Annual Buffalo CarShare Survey and Interview with Michael Galligano..

21 Please note financial numbers are directly from a grant application. Car sharing specifically was 1/3rd of the total campaign featuring other forms of mobility relating to Transportation Demand Management.

22 "Several U.S. shared-use vehicle programs reported that word-of-mouth marketing and decaled vehicles play an important role in customer acquisition. Indeed, one program reported approximately 20 percent of members became aware of their service after spotting a car sharing vehicle in use, while another 30 percent were referred by other users." http://innovativemobility.org/wp-content/uploads/2015/07/Policy-Considerations-for-car sharing-and-Station-Cars.pdf

23 https://www.veloz.org/initiatives/best-drive-ever

24 https://www.veloz.org/wp-content/uploads/2018/03/BDE-2017-FINAL-REPORT_r1.pdf

25 https://adage.com/article/news/daimler-s-car2go-launches-national-campaign/244388

26 https://www.prweek.com/article/1494361/inside-story-car2gos-chicago-launch

27 Interview with Program Coordinator of Reddy Bikeshare

28 https://learn.sharedusemobilitycenter.org/wp-content/uploads/FHWA-P2P-Report_12.11.pdf

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37 Consumer Views on Plug-in Electric Vehicles - National Benchmark Report, Mark Singer, National Renewable Energy Laboratory, 2016

38 World Wildlife Foundation report http://pluginbc.ca/wp/wpcontent/uploads/2016/03/wwf_ev_status_update_report_2013.pdf

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41 US Census data has stated that Buffalo is the 7th most racially segregated city in the Country. https://www.bizjournals.com/buffalo/stories/2002/12/16/story3.html

42 Interview with Slow Roll Buffalo Founder and Organizer

43 https://nabsa.net/2019/05/28/member-spotlight-pacers-bikeshare/ http://betterbikeshare.org/2017/03/28/qa-part-coordinate-bike-share-marketing-goals-across-organizations/

Further Resources on Digital Organizing and Marketing

2020. Nelson Nygaard. "Equitable Public Engagement Practices During COVID-19 and Beyond" https://perkinswillinc-my.sharepoint.com/:v:/g/personal/ytechagumthorn_nelsonnygaard_com/EY684NItUvlMgLbSSLNvI_wBCnTMKiR8kb5zSoVlRPLF6w?e=anbcPy

2020. SURJ. "Digital Organizing Zoom Skill Shared" https://docs.google.com/presentation/d/1rYh76wKt0-h2bRr1G-YsFN6ZlXKtCUQfH_4CmG6KyZ8/edit?usp=sharing

2014 Buffalo CarShare. "Two Years in Review".https://drive.google.com/file/d/15C3_gqWjlsYgvH3ZK-IF1INfAQ0FL-ZA/view?usp=sharing

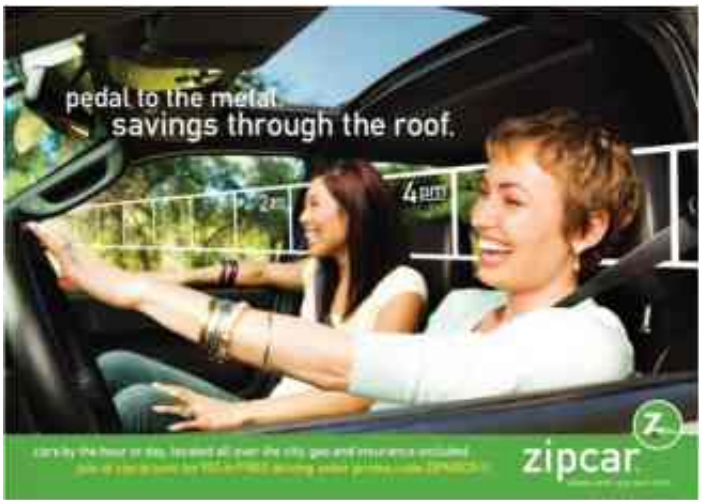
Advertising Examples



Rail/Bus (Buffalo/Capital CarShare)

BCS and CCS used actual members in ads and member testimonials. Introducing a new service with little relative brand equity required advertisements to explain a bit more about the service through text, graphics and imagery. The "grocery shopping trip" is a common carsharing use case, depicted here by a member. Infographics explain a 3-step process. Text reinforces the hourly rental concept. Ads convey "Easy", "Convenience", "Errand-focused", "Local Office", "You".





Digital marketing Zipcar

Student/young demographic target with hip/cool appeal. Zipcar's brand equity relies on mystique and compressed service detail, generally limited to only to lack of info on the service except in digital and social media spaces and generally targeting student populations (which represents a major segment of their market).



Zipcar Billboard

Using local expressions or idiosyncratics to promote business. Appeals to "convenience" over conservation or "environmental concern".

Faces of Indego Campaign: Web Ads



Indego led focus groups expressed importance of representing users of various and larger physiques. The ads convey a "family feel" using real members in ads. Using words like "our", "community" relay the trust in the service.



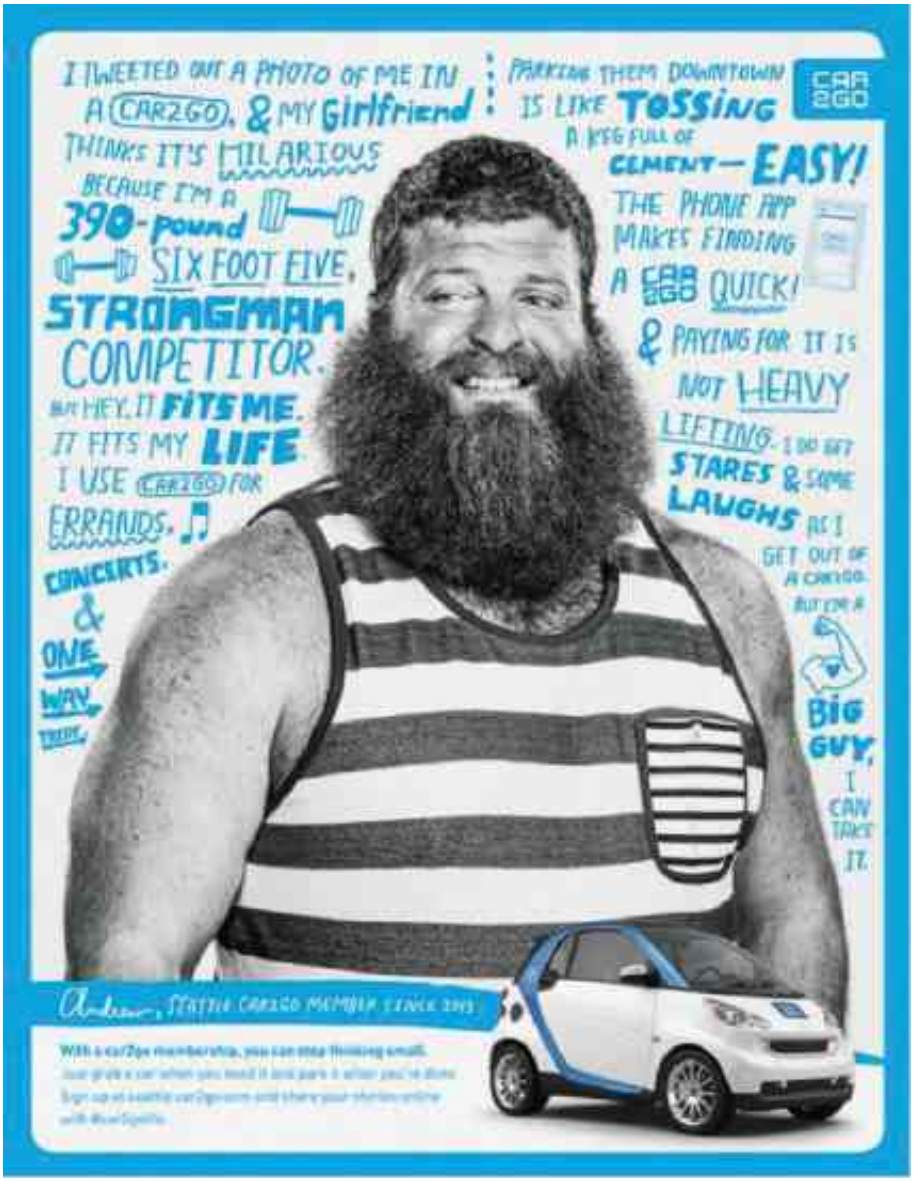
Example of bilingual ads. Using words like "my" and "your" Indego" relay the empowerment of women who are are not traditional shared mobility users.



The concept of family values as represented by mother and daughter. (left)



"Faces of Indego" Billboard campaign (bottom)



Car2Go

Another iteration of real people also incorporating testimonials, with a fun feel that lends towards "viral" marketing. The ad conveys this is not a social service, but rather the amenity with a "hip/cool thing" feeling.



Reddy Bikeshare Billboard

A focus on group interactions use of newly available local bikeways. Aimed at the “discovery” of the waterfront trails in order to promote activity.



Reddy Bikeshare Digital Advertisement

Reddy Bikeshare Digital Advertisement. The ad expresses the theme of interaction and community. As discussed above the Slow Roll campaign and Reddy Bikeshare found synchronicity in developing stronger ties with a community of riders and members. Organizers of the Slow Roll focused on creating a safe space for a broader more inclusive quality of life experience through bike riding.

LyftUp: LeBron James

https://blog.lyft.com/posts/lyftup-bikes

https://youtu.be/b4LJr2ScvdY

Celebrity or local influencer



Getaround Transit Advertisement

Short, pointed messaging, distilled to understanding “transaction”. Full bus wrap and bold color provides “shock value” to grab attention.