The Marketing of Mobility Services

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Introduction

1.1 Background

This report is based on research undertaken in the second year of a two-year project to assess the potential role of mobility services in a future sustainable transport system. The research was funded by a small project grant from the Volvo Research Foundations, although it must be stressed that the research was undertaken independently and the findings and conclusions are those of the authors, alone.

The rationale behind the original project was the ongoing policy discussion about the potential role of mobility services in a future sustainable transport system (e.g. OECD, 1999; AIGT, 2002). While examples of mobility services were readily given – car sharing[1] is arguably the most widely quoted example – there has not been much analysis of what the term 'mobility services' encompasses more generally or what might be the real potential of more mobility services to sustainable transport. The aim of the first year of the project was, therefore, to gain a better understanding of what is meant by the term 'mobility services' and what the experience with such services has been to date (see Skinner *et al*, 2004).

In the course of the first year's research, it was clear that the role of the potential consumers of mobility services, which include car pooling and bicycle pooling, as well as car sharing, was key to their success. Further, it was clear that car sharing, for example, was relatively popular in some countries, e.g. Germany and Switzerland, whereas in others, e.g. the UK, it

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[1] Where car sharing refers to a pool of cars shared by a number of members. While this is the way the term is usually used in English, it is inaccurate. Strictly speaking the service that is referred to as car sharing in English is actually car pooling, i.e. a collection of cars owned centrally that are used by a number of different people. Similarly, the service that is referred to as car pooling, when one person effectively gives another a lift, is really car sharing.

had not reached a comparable degree of popularity. Previous research has shown that certain exogenous factors play an important role in ensuring the success of a scheme (see Enoch, 2002). For instance the provision of an efficient public transport system in conjunction with car sharing and bicycle pooling has on many occasions been found to help complement one another. Similarly, the role of local, regional and national government is often vital in the success or failure of a scheme depending on the level of support afforded to mobility services.

Other research has examined the motivations of those who use the schemes. This has suggested that users of schemes that involve cars can be motivated by the environmental impacts of their travel behaviour and by avoiding the cost of using and running a car (see Behrendt *et al*, 2003; Bosch *et al*, 1998; Meijkamp, 2000). For bicycle pooling, the health benefits of using alternatives to the car have been identified as a key motivation (De Maio and Gifford, 2003). While these are the motivations of the users, there appears to be little literature on how schemes actually market their 'product' to potential users. The role of marketing in changing travel behaviour has been identified as important by projects such as INPHORMM (1998) and TAPESTRY (see Tyler, 2003). However, these focused on travel behaviour, more generally. It was therefore decided that, in the second year of the research programme, we would examine the way in which mobility service schemes have been marketed to potential users.

1.2 Aim and Scope of the Research

The main objective of the research on which this report is based was, therefore, to explore in depth the marketing of mobility service schemes. The types of schemes on which the research focused were car sharing, car pooling and bicycle pooling, as the first year report identified these as the most prevalent type of emerging mobility service.

The research examined the following aspects of how schemes were marketed:

- Target audience, and how this was identified;
- Type of media used;
- Content and style of the message; and
- Whether the marketing reflected the origins of the scheme.

The research, therefore, did not just explore how schemes are marketed but also the reason that they are marketed in this way, as well as examining the links between the two.

1.3 Methodology

The research had the following stages:

1)   Identification of schemes to research. A list of potential mobility service schemes (ie car share, car pooling and bicycle pooling schemes) to contact was drawn up, based on those that had been identified in the course of the first year's research (see Skinner *et al*, 2004). In order to obtain as diverse a set of views as possible, the schemes were chosen to represent a number of different European countries and the US.

2)   Development and circulation of a questionnaire. A questionnaire was developed, which was circulated electronically in August 2004 and then again in January 2005 to all of the mobility service schemes on the list. The main aim of the questionnaire was to establish the rationale behind the schemes' emergence and the types and scale of marketing employed by individual schemes. Questions were also asked on whether specific audiences were targeted and if so who these were and how they were identified. A full list of those that contributed is given in Annex I.

3)   Follow-up interviews. In addition to responses received from the questionnaires, 10 follow up telephone interviews were carried out with some respondents to clarify various issues. These interviews were undertaken between January 2005 and March 2005

4)   Analysis of promotional material. Schemes were also asked to provide examples of any marketing material they had produced, such as leaflets, posters, flyers, transcripts or copies of radio/TV adverts and pdfs of posters, etc. Examples of marketing were also obtained through web searches and were provided by CarPlus UK.

5)   Analysis and assessment. The information obtained from the questionnaires and interviews was also analysed and brought together with the analysis of the marketing material to complete the review of the way in which mobility service schemes are marketed.

1.4 Structure of the Report

The report is structured as follows:

- Chapter 2: Rationale Behind the Emergence of Mobility Service Schemes

In order to understand why a scheme is marketed in the way it is, the rationale behind the various schemes was identified and explored. This was considered important in order to identify whether the reason for setting up a scheme was mirrored in its marketing, or whether a different message was used to try to sell the scheme. In addition, we identified whether, and if so how, the marketing of a particular scheme had changed. Consequently, Chapter 2 explores the rationale behind the setting up of mobility service schemes.

- Chapter 3: Identifying the Target Audience

An important aspect of successfully marketing any product is to identify a target audience and to tailor the marketing message to appeal to that 'audience'. Hence, the research explored whether mobility service schemes have identified a target audience and how this audience was identified, e.g. through market research. Chapter 3, therefore, looks at whether or not mobility service schemes did identify a target audience and the basis on which this audience was identified.

- Chapter 4: Marketing: Media Used and the Presentation and Content of the Message

Having explored the rationale behind the setting up of the schemes and the target audience of the marketing, Chapter 4 focuses on how the message is communicated. It starts by reviewing the types of media used to market mobility service schemes. This is followed by an exploration of the message contained within the marketing itself, including the way in which the message is presented, its type and content.

- Chapter 5: Conclusions

Chapter 5 concludes the report with a summary of the main findings.

2

Rationale Behind the Emergence of Mobility Service Schemes

As the debate on the problems associated with rising car ownership and car use has developed, the use of mobility services has increasingly been put forward as a possible part of the solution in achieving a sustainable transport system. Although the emergence of mobility services can be traced back to as early as the 1970s it was not until the late 1980s and early 1990s that mobility services really began to take off. Historically, the majority of mobility service schemes emerged as a reaction to alleviating local environmental externalities such as air pollution, in line with the wave of environmental awareness that was occurring at that time. More recently, however, other issues, such as land-use planning and accessibility, have become more prominent issues in the transport debate and have also led to the setting up a mobility service scheme (Skinner *et al*, 2004).

When undertaking the analysis of the responses to the questionnaires, it was found that the rationale behind the setting up of a scheme can be broadly categorised as addressing at least one of the following:

- Environmental concerns;
- Congestion;
- Accessibility;
- A planning requirement; or as a
- Profitable venture.

These motivations are addressed, in turn, in Sections 2.1 to 2.5. Additionally, the research found that some bicycle pooling schemes are marketed as tourist attractions (Section 2.6). Section 2.7 summarises the findings of this chapter.

Before doing this, however, it is important to highlight that not all schemes fit neatly into the categories, below, as some were set up in response to more than one concern. However, it is still useful to view the motivations in terms of these distinctions to help understand the wide breadth of motivations underpinning the emergence of such schemes.

2.1   Environmental Concerns

The late 1980s and 1990s saw the emergence of a number of car share schemes across Europe. This corresponds with a growth in environmental awareness of the general public at that time[2]. Sperling *et al* (2000) point out that; 'all car sharing organisations, other than those operated by corporations for their employees, began as small local operations, usually with government funding and usually inspired by ideological concerns about car dependence and the negative impacts of cars.' In Germany, numerous small-scale schemes were set up by co-operatives in response to the negative effects of the growing car culture. For instance StadtAuto, in Bremen was formed with a community–based environmental ethos, as was StattAuto in Berlin which emerged as a research project concerned with environmental affects of car driving but quickly became one of the most successful car share schemes worldwide (EAUE, 2005).

The ethos behind the Swiss Mobility scheme was also largely environmental. In 1992, the Swiss federal government's Energy 2000 action program conducted a study which established the energy savings potential of car sharing. Prior to the setting up of Mobility as a single national provider of car share schemes, two smaller operators, the Car Sharing cooperative ATG (Auto Teilen Schweiz for central Switzerland) and Share Com (in Zurich) existed alongside each other providing car share facilities. However in 1997, with support from the Motor Fuels Section of the Swiss Federal Government, Mobility was formed. Whilst Mobility became more commercial in its business dealings as it grew in size, its ethos nonetheless has remained concerned with the environment (Mobility, 2004).

A number of car share schemes are keen to demonstrate their environmental credentials and profile themselves as being environmental friendly through their use of alternatively fuelled vehicles. For instance Liselec, in La Rochelle France, has championed the electric car as 'a silent, non-polluting, pleasant mode of urban transport' with its fleet of 50 electric vehicles which can be picked up at 7 different stations 24 hours a day (Liselec, 2004). SunFleet also markets itself from an environmental viewpoint, with its website including the phrase ***'A green car when you need one'.*** This is reinforced as their fleet consists exclusively of alternatively fuelled vehicles such as electric, electric-hybrid and gas-hybrid cars including, *inter alia* Volvo BiFuel models and Toyota Priuses (Sun Fleet, 2005). Interestingly, the two largest US schemes,

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[2] Publication of the Brundtland Report in 1987, Chernobyl disaster, growth in green politics

Zipcar and Flexcar, which are profitable ventures, also include hybrid vehicles in their fleets. Zipcar has over 400 vehicles and around 12% of them are hybrids (Zipcar, 2005). Flexcar has a fleet of 350 cars, out of which 25% are hybrids. Nevertheless, whilst both schemes market themselves as commercial outfits, environmental concerns are still important to them. Indeed ZipCar is keen to point out its environmental credentials in a section entitled 'green benefits' on their website. This refers to how the scheme can contribute to *inter alia* reductions in greenhouse gas emissions and particulates, and how their fleet replaces older vehicles with new ones that comply with stricter emission standards that benefit the environment (ZipCar, 2005).

Car pooling and bicycle pooling schemes also often have environmental objectives in mind when setting up, again this makes sense as if the schemes are used, environmental benefits often occur. For instance the Danish city Odense sought to encourage cycle use as an environmental form of transport through encouraging the lending of bicycles to the city's main businesses. It encouraged companies to buy their employees bicycles and if more than 500km was travelled in the first six months of use the municipality promised to pay half the cost of the bicycle (Cycle City, 2003). However, in the majority of cases, whilst many car pool and bicycle pool systems do have environmental concerns, this is not primarily their main motivation (see below).

By their very nature then, mobility services promote sustainable modes of transport. Therefore in many ways it would seem that all schemes are necessarily concerned with environmental issues and hence seek to contribute towards alleviating the environmental impacts of car use. As will be demonstrated below, whilst environmental objectives arguably play an underlying theme in most, if not all, mobility services, only a proportion of schemes see environmental motives as their primary reason for setting up.

2.2   Congestion

Whilst the environmental agenda was a high priority in the late 1980s this gave way to (although was not totally replaced by) concerns about the levels of congestion in the late 1990s, which exist to the present day. In some ways this could be attributed to the fact that congestion is a more tangible issue to deal with in comparison to environmental issues such as global warming etc. The latter being viewed as an issue that is too far removed from the general public's everyday experience and hence the public has trouble relating to; conversely congestion affects people and businesses on a daily basis and is viewed as a major problem. Indeed this has been reinforced with recent studies showing the high costs of congestion to businesses etc, through time lost in delays and staff stress levels[3].

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[3] See Confederation of British Industry (CBI) website: www.cbi.org.uk

The majority of car pool schemes emerged with the help of financial support from government or local authorities and often (eg for UK schemes), in conjunction with travel plans. Funding for such schemes was in many cases stimulated by the problems occurring as a result of congestion. Accordingly, the majority of car pool schemes aim to reduce congestion in the local area. However it is important to note that many of the car pooling schemes were also concerned about the environmental benefits that the schemes could bring and also about the potential improvements to accessibility in their respective areas.

Commuter Connections in Washington DC, US, provides *inter alia* a carpool matching service to commuters. The car pool system, which has been funded by a number of federal and state level authorities, aims to tackle congestion at peak times caused by commuters. Similarly, in Gothenburg the Swedish National Road Administration has set up a project called Intelligent Samåkning to encourage car pooling amongst businesses in the area. The 'purpose of the project was to try to make travellers share vehicles, thereby reducing traffic congestion' (Samåkning, 2005) and was initiated in response to the growing number of vehicles on the road. The scheme is open to any organisation in Gothenburg, and those that sign up are offered an IT system for their employees to use. This system allows employees to enter their travel plans and this finds suitable matches with other making similar journeys.

Car share schemes have also emerged in response to concerns about congestion. For instance the Edinburgh City Car Club was initiated as a result of *inter alia* the City of Edinburgh's Council policy document 'Moving Forward', which committed the council to examine alternative transport options for the City. One of its aims was 'intended to assess the potential for pay-as-you-drive car sharing (PAYDCS) schemes to contribute to the growing problems of congestion, car related pollution and parking pressures in the city' (Hope, 2001).

2.3   Accessibility

Longer trips by car have been compounded and encouraged by land use policy in the 1980s which witnessed a greater dispersal of developments, resulting in *inter alia* out of town shopping centres and low density housing. As people travelled further to use these services, the closure of many services (easily accessible on foot) such as post offices and corner shops, occurred. This reduced the ability of certain disadvantaged members of society to access essential services, including *inter alia* employment, health care and education. Accordingly, improving accessibility is a particularly pertinent topic in transport discussions at present. The European Commission's Joint Expert Group on Transport and the Environment emphasised that the main aim of a sustainable transport system is to provide accessibility. Similarly in 2003, 'accessibility' was the core theme of European Mobility Week.

The use of mobility services is seen as being able to help improve accessibility and increasingly a number of mobility service schemes are emerging to help deal with such problems. Halton Borough Council (UK) is an area with high unemployment and suffers from many problems of social exclusion. To help overcome some of these problems the Council has set up a car pooling scheme to help tackle problems of accessibility for its residents. This scheme uses volunteers who provide lifts in their own cars to provide transport for people without access to public transport, particularly those who have a disability or who are elderly (Halton, 2005).

City Wheels, Swansea was the first car club in the UK to specifically serve social housing residents. It was set up by Swansea Housing Association in February 2001 to meet the needs of their City Living tenants - a project to encourage people to move back into the city centre. Of these tenants, 30% were unemployed, retired or had disabilities. Moreover whilst the remaining 70% of tenants were in employment, incomes are generally lower than average. Therefore the scheme aims to provide access to cars to those that would not normally be able to afford it (CityWheels, 2004).

There are also a number of bicycle pooling schemes that aim to address the problems of social exclusion. For instance Yellow Bike Action is a local non-profit scheme in Kingston, Canada. The scheme aims to reduce economic barriers to cycling by providing affordable Yellow Bikes for rent, although the scheme was also very much concerned with the environmental benefits that would result from the promotion of cycling. The organisers set a charge at an amount that they considered was reasonable and affordable and would not put off users who might be on social assistance. The scheme also offers free bicycles for children, in particular for children from disadvantaged backgrounds. They also provide access to tools and parts for a small fee and offer lessons in bicycle repair. This scheme is seen as vital to allow those people whose only source of transportation is a bicycle to be able to afford using one in a safe way, as commercial shop rates for repairs are often too expensive for the typical users of the service (Yellow Bike Action, 2004).

The Palmerston North Green Bike scheme in New Zealand is another example. It was launched as an employment scheme for people with disabilities and for the long-term unemployed. The Green Bikes Trust in Palmerston North takes old bicycles that people no longer want and restores them to full working condition in their workshop and then members of the community can borrow them at no cost. This can involve bicycles being lent out for short periods ranging from a few hours to a day, to longer-term loans where users can borrow bicycles exclusively for periods as long as a month or more. The scheme works with a number of Community groups and trusts, including Women's Refuge, Prisoners Relief and Barnardos (Palmerston North, 2004).

It is also interesting to note that whilst issues of social inclusion were not one of the main motivations behind the emergence of the Copenhagen Bycyklen scheme or the Sandnes (Norway) bicycle scheme, both have incorporated

elements of this type into their programme through its use of rehabilitees learning how to maintain the city bikes (Bycyklen, 2004; Sandnes, 2004).

2.4   A Planning Requirement

In the UK, car share and car pooling schemes are increasingly emerging as a result of development controls. For instance businesses that extend their premises or relocate to a different area are often required to produce a travel plan to reduce the negative impacts of transport that may occur as a result. The inclusion of car sharing and car pooling schemes are often one of the measures included in a travel plan. Car pooling schemes in particular are often included as they are viewed as one of the more acceptable alternatives in comparison with measures such as charging for car parking or other restrictions. This is because car pooling still allows the user to effectively use their vehicle, albeit in a slightly different manner.

Vodafone, UK was required to implement a travel plan as part of a planning application for a new office. One of the measures included was the implementation of a car pool scheme for their employees. Employees could locate people to share with from the company's intranet and can make bookings either through individual PCs or by mobile phones using SMS. The company also allocated 175 spaces for car sharers (split between two different sites) and a cash incentive of £42.50 per month to those taking up car pooling. Egg based in Derby, UK also implemented a car pool scheme as part of their planning permission for the development of a new site. Although no formal system exists for matching employees with each other to share a journey to and from work, the company waived car-parking charges for those sharing a lift (Department For Transport, 2002).

A number of car share schemes have also emerged as a result of planning requirements. In Deptford, UK, a development of 450 flats with limited car parking led to the developer, in partnership with Avis Car Rental, establishing a car share scheme for the residents, in order to get planning permission. Nineteen vehicles were provided and the annual membership fee of £99 was paid in the first year by the developer. Similarly, BedZed, the Beddington Zero Energy Development, which is an environmentally-friendly energy-efficient mix of housing and work space in Beddington, was looked upon more favorably by the planning department at the London Borough of Sutton, as a result of their inclusion of a car share scheme. Interestingly, the London Borough of Sutton is also a partner in MOSES (Mobility Services for Urban Sustainability), which explored the potential for car share schemes in urban locations across Europe (MOSES, 2005).

The UK is not the only country however to use these methods. In the Netherlands the government has stipulated that 'where an appropriate area is redeveloped for housing, these must have a car share scheme from day one'[4].

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[4] An appropriate area being apparently 10,000-30,000 people

Moreover it would seem that a number of cities worldwide are implementing stricter development control and parking controls so it is a possibility that more car share schemes could emerge as a result of such measures (Enoch, 2002).

2.5   Profitable Venture

The majority of bicycle pool schemes are free to use or incur only a very low cost. In this sense it seems unlikely that any schemes aim to be profit making. Indeed De Maio and Gifford (2003) who have written about bicycle pooling schemes believe no program has made a profit to date. Whilst the majority of schemes tend to be community based, a number of schemes are owned by private advertising companies such as Clear Channel Adshel, JC Decaux and Gewista, and also by a number of public transport operators, such as Pro Rail and Deutsche Bahn. The former companies use profits made from charging other companies advertising space on the bicycles, which in turn are then used to fund the bicycle pool schemes. Alternatively, in some cases an agreement is made with the local municipality that allows these companies to also use street furniture such as bus shelters and lampposts for advertisements. This is one of the ways that the Copenhagen Bycyklen funds itself. However, as has briefly been demonstrated the main objective of bicycle pooling schemes are concerned with 'social' benefits or, as will be demonstrated below, for tourists.

Often, local authorities and municipalities have received government or EU funding to provide car pool services in an attempt to encourage sustainable mobility. For instance Warrington Borough Council received a Rural Bus Challenge grant from the UK government to set up a car pool system for rural areas in the Borough as a supplement to rural public transport provision. The grant covered the costs of the software database, the employment of a coordinator to manage the system and the promotion and marketing of the scheme to the general public (Warrington, 2004). The scheme was then promoted to the public and was free of charge for anyone wishing to use the service. This is a typical example of how local authorities and municipalities are able to promote car pooling schemes free of charge to the general public, and therefore very rarely seek to make any profit from them. Perhaps one exception to this is the Citynetz Mitfahrzentrale scheme in Germany, which does require users to pay for the service. This is a pool system with offices in 19 German cities. Customers can book trips either by telephone or on the internet and a small arrangement charge is payable to the organisation (Citynetz, 2005).

A number of car share schemes however, do aim to make a profit. Whilst this was not common in the early days of such schemes, which tended to be run by small co-operatives more concerned with an environmental ethos, financial motivations have been on the increase. For instance a number of the US and Canadian car share schemes have been developed as commercial enterprises. Zipcar, US has based its style of operation on the German StattAuto scheme

and has also focused heavily on the use of technology in its development. AutoShare in Canada was also keen to be a profit-making scheme. They were keen to provide a professional service and image and to run the scheme as a 'serious business venture'. AutoShare believe this would help the growth of the scheme as opposed to a community group image which they had also considered (AutoShare, 2004).

Germany has a number of commercial car share schemes. Cambio, which operates in seven cities, claims to have 325 vehicles and over 10,000 members. Stadtmobil which has services in Dortmund, Duisburg and elsewhere in Germany also has comparable membership figures. StattAuto which was founded in Berlin in 1998 was the first scheme to be set up in Germany and whilst not originally set up to be profit making it is now considered to be one of the most profitable car share schemes in existence. The high presence of commercial schemes in Germany can in many ways be attributed to legislation peculiar to Germany. That is, once membership levels increase above a certain level, organisations are required to change their legal status from (usually) not-for-profit organisations to limited companies (StattAuto, 2003).

2.6 Bicycle Pooling as a Tourist Attraction

More recently, bicycle pool systems have increasingly been set up as tool to promote tourism in a number of cities. Whilst this may not have been the original objective of schemes such as the Bycyklen scheme undoubtedly their City Bikes have become as well a known tourist attraction in Copenhagen as comparable features such as the Little Mermaid. In Sandnes, Norway the bicycle pooling scheme was originally intended for local people making errands around the town centre, and although tourists were to be targeted to a lesser extent it soon became clear to the coordinator of the scheme that tourists were actually the main users of the bicycles. Cities have taken this on board and increasingly schemes are ensuring their schemes are easy to use to tap into the tourist market.

2.7 Summary

As mentioned previously, it is important to stress that not all schemes fit neatly into the categories outlined above and that in some cases schemes had a number objectives that they wished to fulfil. Nonetheless, the different categories identified are useful in showing that mobility service schemes have a broad range of issues that they wish to deal with.

Furthermore, whilst it is generally considered that the three different types of mobility services being examined in this report seek to promote sustainable modes of transport, and whilst the majority of schemes are keen to help provide environmental benefits as a result of their scheme, this section

highlights that environmental considerations are not always the single most important factor underlying the emergence of schemes.

It is also interesting to note that some rationales were more prevalent to certain types of schemes. For instance the emergence of a number of car pooling schemes in response to congestion in the local area seems to be a common trend. Similarly, a number of community bicycle pooling schemes were set up with the objective of reducing social exclusion and improving accessibility. To date, evidence would suggest that only car share and car pool schemes have been set up in relation to planning requirements, although in the future perhaps this might be extended to bicycle pooling schemes also. Perhaps the service with the most varied rationale is car sharing, where schemes have emerged in response to the majority of rationales identified.

Whether these motivations will have an impact on how such schemes are marketed will be revisited in Chapter 4.

3

Identifying the Target Audience

In order to market a product successfully it is generally acknowledged that a target audience needs to be identified, and marketing should be tailored to appeal to that 'audience'. Previous research has shown that certain types of people are more likely to sign up to car share, car pool and bicycle schemes than others (see Behrendt *et al* (2003), Baum and Pesch (1994), Muheim (1998) and DeMaio and Gifford, 2003). Ideally, the key is to identify who these people are and market schemes so that they directly appeal to them.

Section 3.1 gives a brief assessment of existing research conducted on the demographics of mobility service users to set the scene in relation to exactly 'who' uses mobility services and 'what' motivates them. Whilst few data on the demographics of car pool users exist at present, numerous studies on car share users, and to a lesser extent bicycle pool users, have been conducted. Accordingly the majority of this section will focus on these latter types of scheme. These findings will then be looked at in relation to the research we conducted with a number of different schemes worldwide – looking at the basis on which they identified their target audience and whether correlations exist. Hence, Sections 3.2 to 3.4 explore, in turn, whether a target audience is identified, how this is done and the nature of this audience.

3.1 Review of the Relevant Literature

Research carried out by Carplus UK – the umbrella organisation which represents UK car share schemes – found that most members of car share schemes tend to have similar characteristics. For instance:

- Over one third of members are aged between 30-40;
- The majority have professional jobs;

- They generally have above average education and live in urban areas; and
- They often have a higher-than-average income (Carplus, 2004).

Similarly, studies conducted in both Germany and Switzerland found that car share users tended to be between the ages of 25-40 and had above average education. However, slight differences were highlighted, in particular they posited that most users did not have a higher-than-average income, rather that users tended to have modest incomes, which could be a direct result of the young age of users who have not yet reached their full earning potential. Studies also indicate that more men than women are likely to join a car share scheme (Shaheen *et al*, 1999).

In relation to bicycle pooling schemes the majority of users tend to be younger individuals. For instance 66% of users of bicycle programmes in the United States were under the age of 45 (De Maio and Gifford 2003). Similarly, Bycyklen's customer base was mainly between the ages of 20 and 39 years old, and other schemes in Europe also have users of comparable ages. In comparison with car share schemes which often require users to be over the age of 25 for insurance purposes, bicycle pool schemes tend not to have age restrictions, although obviously small children would not be encouraged to use such bicycles. Accordingly, this allows for a larger number of users under the age of 25. Meanwhile, with respect to gender, in the majority of schemes male users are marginally better represented, with the exception of the OV-fiets scheme in the Netherlands where females represent a slightly higher percentage of users (De Maio and Gifford 2003).

The motivation of users is varied, and has arguably altered as schemes have matured over time. Previous research indicates early adopters of car share schemes tend to be those with environmental concerns. Baum and Pesch (1994) found environmental aspects were cited by 70% of car share respondents. A survey carried out by the StadtAuto car share scheme in Bremen, Germany, found that the majority of initial members to sign up did so because of environmental concerns (Shaheen *et al*, 1999). Similarly, research by Carplus UK also found 'early adopters' were those with 'green/environmental characteristics, being conscious of issues such as pollution, safety, traffic reduction etc' (Carplus UK, 2004).

However, as schemes matured it was found that such motivations reduced considerably. Indeed, a study carried out by Muheim, tracing the history of carsharing in Switzerland found that by 1997, the proportion of those users joining for environmental reasons had fallen considerably in comparison with users joining when the scheme was originally launched (Katzev, 2003).

More recently then, as a shift away from environmental concerns has occurred, financial savings and the need for an additional vehicle have been cited as the predominant motivation for joining a car share club. Meijkamp's (2000) extensive research on car share schemes in the Netherlands reinforced

such views. He highlighted that the increasing costs of driving motor vehicles was found to be the main reason for users joining the scheme, followed by dissatisfaction of public transport journey times and problems with residential parking. Moreover, a survey conducted of members of Car Sharing Portland found that the financial savings they would make by not purchasing a new or additional vehicle were paramount. However, the majority of members of the Portland scheme cited the primary motive for joining was prompted by their need for an additional vehicle (Katzev, 2003). This ties in with research on the effects of car share schemes. In particular the findings that membership often results in users deciding not to buy an additional vehicle. For instance Zipcar states that 25% of its members have been able to avoid purchasing a second car as a result of them joining the scheme (Zipcar, 2003).

Katzev cites the work carried out by Harms and Truffer (2002), which also highlights financial reasons such as users not being able to afford their own vehicles due to rising insurance costs or because of maintenance repairs. They also attribute changes in users personal circumstances for joining schemes, such as losing vehicles through divorce or a change of profession.

Less research has been carried out on the motivations of bicycle pool users. However, De Maio and Gifford (2003) cite a study carried out by Pucher and Dijkstra (2000) that found that in 82% of cases bicycles were used for social or personal business. De Maio and Gifford also believe that such schemes appeal to users for their convenience angle. Aside from those situated in tourist areas the majority of bicycle pool schemes are located in city centre areas 'primarily due to the compactness of urban development where biking is ideal'. Hence they believe the majority of users of these schemes are commuters, often on the last leg of their trip, who have used public transport for some part of their journey and the use of a bicycle prevents a longer walk or transfer to their final destination.

The above findings offer only a brief review of the demographics of users and their motivations for joining schemes. Clearly this topic is a complicated one and the true intricacies of users' backgrounds and motivations cannot be given true justice in the space of this report. Nonetheless it does offer a useful overview on the types of people schemes should perhaps be targeting. In view of this, a number of car pool, car share and bicycle pooling schemes were contacted and a variety of questions were put to them in relation to whether they had identified a target audience to which to 'sell' their scheme. The information gained also raises interesting points as to what correlation, if any, exists between the previous research conducted and our findings. The following sections will address three main questions: 1) Was a target audience identified? 2) How was this audience identified? and 3) What audience was identified?

3.2 Was a Target Audience Identified?

The majority of schemes contacted had identified a target audience in the process of setting up their scheme, ie 'who' they wanted to use their services. As will be shown below, schemes used a variety of methods to identify their target audience. In most cases these can be grouped under similar headings. Nonetheless, despite the undertaking of similar methods to identify an audience, the characteristics of these 'audiences' vary greatly between schemes.

Not all schemes that were contacted had identified a target audience. For instance, Smart Moves, a UK Car Club operator, which currently oversees five schemes in the UK, was first established in 1998. It runs schemes in partnership with other organisations such as local authorities, housing associations and businesses. Discussions with Smart Moves indicated that initially no target audience was identified when setting up schemes. However, it was realised that this was a weakness, so schemes that have been developed more recently have tended to identify a target audience. Accordingly, Smart Moves began to identify the appropriate audience from a mixture of their own experience with running schemes, as well as learning from other schemes (SmartMoves, 2004).

The Copenhagen Bycyklen scheme, when it launched its scheme, did not identify a particular audience. It was felt by those responsible, that because the bicycles were free to use this would mean that 'selling' them to the clients/users would not be a problem, rather ensuring enough bicycles *were* available for use would be the greatest obstacle (Bycyklen, 2004). This poses interesting questions as to the need for targeted marketing strategies as the Bycyklen scheme is one of, if not the most, successful bicycle pooling scheme in existence. However, its success can perhaps be attributed to a number of reasons *inter alia* high visibility of bicycles, prominent cycling culture in Denmark, no complicated booking systems etc.

Despite the small number of schemes contacted that did not identify a target audience, it was clear from our findings that the majority of schemes did feel the need to identify one. The next section addresses the way in which schemes identified their audience.

3.3 How Was This Audience Identified?

A large number of mobility service schemes carried out some degree of background research before launching their schemes. This took a variety of forms, which can be broadly categorised as learning from the experience of established schemes (as discussed in Section 3.3.1) and undertaking their own market research (Section 3.3.2).

3.3.1 Researching Existing Schemes

Drawing on the experiences of mobility services already in existence was obviously not an option available to the pioneers of mobility services such as Mobility, StattAuto and the Amsterdam White Bikes Scheme. Being amongst the first schemes to develop, in many ways they had to approach their schemes on a trial and error basis. However, more recently, the experiences of schemes already in existence such as these pioneers have been able to provide vital information for those in the process of setting up mobility service schemes.

The majority of bicycle pooling schemes drew on the experience of the Bycyklen, Copenhagen and the Amsterdam White Bike scheme. These two schemes are arguably the most well known schemes, despite the latter failing after the majority of bicycles were stolen. The Norwegian scheme Sandnes made personal contact with the people involved in the Amsterdam and Copenhagen schemes. They believed this was particularly useful in helping to identify their target audience, and more importantly allowed them to avoid the mistakes that had been encountered previously by the two schemes (Sandnes, 2004).

AutoTeil in Germany also had considerable dialogue with an existing car share scheme, StadtAuto in Bremen. This even extended to them using one of the Bremen scheme's vehicles to launch AutoTeil (AutoTeil, 2004). Auto Share in Canada also sought to learn from the experience of previous schemes. In this instance the coordinator of the scheme had previously been involved with the setting up of a scheme in Vancouver, and had also made personal contact with Communauto another scheme in Canada. AutoShare also researched a number of European schemes on the internet prior to setting up in 1998, although the coordinator highlighted the limited resources available at that time (AutoShare, 2004).

Whilst personal contact seemed to be beneficial for a number of schemes, this was not possible for all schemes. For instance, the issue of geographical distance made it far easier for a representative from Sandnes in Norway to travel to Amsterdam and Copenhagen, as compared to those based in Canada and the US. Instead a number of schemes relied upon either internet research or on printed publications/marketing leaflets produced by schemes. For instance, The Yellow Bike Action programme in Kingston, Canada used library resources to research other schemes (Yellow Bike Action, 2004). Teil Auto in Germany used newsletters and magazines of car sharing schemes already existing in other cities. In particular they found the Austrian scheme DenzelDrive a particularly good case study (Teil Auto, 2004). Fahrgut Hegau in Germany found that 'intensive support and long-term exchange of experiences with other car sharing organisations was particularly useful (Fahrgut Hegau, 2004).

A number of car pooling schemes in the UK benefited from the work carried out by Liftshare, a software provider of car pool schemes. Liftshare currently has the majority share of local authority run schemes in the UK, and as part of its sales package provides background material on other local authorities already using their software. This includes information on a range of measures from the target audience to the preferred types of marketing to use (Hampshire, 2004). This allowed local authorities to see the possibilities of setting up a car pool scheme and offered useful comparisons of how the scheme could work for their authority.

3.3.2 Market Research

Edinburgh City Car Club carried out a feasibility study before launching its scheme. This took the form of postal questionnaires sent to the types of individuals that it assumed would be most interested in car sharing. These included members of environmental groups, people who could not afford a car and those living in areas experience parking problems (Hope, 2001). Questionnaires were also sent out to organisations that had demonstrated an interest in environmental issues in the past. The study not only identified that a scheme would be feasible, but it also made conclusions on who should be targeted, using the ACORN system[5]. The nature of these results will be discussed below shortly.

OV-fiets bicycle pooling scheme in the Netherlands carried out stated preference research which allowed it to identify the necessary gaps and improvements that could be made to deliver a successful bicycle pooling scheme and also who the main users would be (OV-fiets, 2005). Commuter Connections, US conducted a number of focus groups and online surveys to determine its target audience. The findings not only defined who would be targeted but also the design of the tagline, the messages and format of the testimonials (the style of advert chosen) (Commuter Connections, 2004). Shell Drive, the car sharing section of Shell, also carried out extensive market research before taking over a number of existing car share schemes in Germany. This included consultation with a number of local businesses, the local municipality and the general public (Shell Drive, 2004).

Indeed, consultations with relevant stakeholders were identified as one of the most common forms of market research carried out by schemes of all types. For car pool schemes, one of the most popular forms of consultation involves discussions with businesses, as commuters would be the main 'target audience' of such schemes. For instance Hampshire County Council, UK consulted members of the Winchester Commuter Forum. The forum, which was established in February 1998 in response to concerns about traffic congestion and parking, conducts regular meetings concerning the improvement of transport options for Winchester commuters. Members of the

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[5] This is a geo-demographic classification system developed by CACI a provider of consumer analysis and systems integration; for more details see www.caci.co.uk

forum consist of a number of large organisations which together employ approximately 10,000 people in the Winchester area (Hampshire, 2004).

3.4   What Audience Was Identified?

As has been shown, the majority of mobility service schemes conducted some kind of research before deciding upon their target audience. This next section looks in more detail at the actual types of audience identified.

3.4.1 Car Pooling Schemes

There tends to be two main types of car pooling schemes. Those open to the general public and those with restricted membership, the latter usually centred on workplaces. For workplace schemes the target audience is clearly already known. However, the majority of car pool schemes questioned in this study were local authorities promoting car pooling to the general public and these too flagged up commuters as their main target. This makes sense, as there is a lot of scope for gains to be made from this group. For instance, the highest levels of congestion tend to occur during peak times when people are travelling to and from work. Similarly, employees of the same organisation can share the journey to work quite easily as the end destination is the same.

In some cases specific types of commuters were targeted. For instance, South Gloucestershire Council identified commuters in a specific area that included key businesses located on the ring road and north fringe of the area (South Gloucester, 2004). Similarly, Hampshire County Council initially targeted their own employees commuting to the work place in an attempt to reduce congestion and local environmental concerns. Although this was later extended to all organisations in the area that were in the process of developing travel plans (Hampshire, 2004). Commuter Connections, US, wanted to target single occupancy vehicle drivers aged between 25-54 on the daily commute (Commuter Connections, 2004). Warrington Borough Council had received funding to promote a car pool scheme for rural areas; accordingly rural communities were the original focus of the scheme, however, this was soon extended to cover the entire borough and was promoted to businesses and the general public alike (Warrington, 2004).

However, other car pool schemes cast a wider net than just commuters. For instance LiftShare's provision of car pooling to the general public not only provides general matching services for members of the public, but also targets large one off events such as music festivals or sporting events (Liftshare, 2005). Freewheelers offers similar services on an international basis (Freewheelers 2004).

3.4.2 Car Share Schemes

Whilst car pool schemes tend to have the same target audience in mind, in comparison car share scheme audiences appear to be more varied. In many

ways this makes sense, as demonstrated in Chapter 2, car share schemes are set up in relation to a number of different reasons. Nonetheless similarities can still be drawn and certain core themes are apparent. These can be grouped under the following headings: geographical location and users social group.

A number of schemes identified potential users in certain ***geographical locations*** and realised that it would make sense to target these particular areas. For instance AutoShare, Canada made use of their local knowledge of the area to identify that members of the public living in close proximity to the subway would be more susceptible to car sharing. This can be seen to tie in with the importance of car share schemes being located near public transport facilities (AutoShare, 2004). In many ways car sharing is a complementary service to public transport, as it often could not be used to its full potential without the existence of a good quality public transport system. Indeed organisations offering mobility services often work with a range of other organisations such as providers of public transport when setting up their schemes. In addition to locations near good public transport, a number of schemes decided to target areas that were facing difficulties in relation to parking. Hour Car, UK identified the busiest town centre areas where parking is limited (Hour Car, 2004). Similarly, Vrtucar, Canada recognised that the older neighbourhoods in the area that face parking charges might be more susceptible to car sharing (Vrtucar, 2004). Some schemes went even further, specifically setting up car share facilities for a 'closed' group. In other words users had to be from a particular location to qualify for membership. City Wheels, UK is one example where only tenants of a particular housing association and staff who work there during the day are allowed to join the scheme. (City Wheels, 2004). In Lubeck, Germany, Volvo was involved with a similar scheme which is restricted to members of a housing development (Enoch, 2002).

With car pool schemes the ***users social group*** tends to be relatively straightforward, in the sense that 'commuters' are seen as a homogenous group and if they drive to work, they can be targeted. However, in comparison, users likely to join car share schemes tend to demonstrate a variety of characteristics, although previous research conducted on this area shows that nonetheless certain characteristics are more prevalent that others. For instance as highlighted earlier in this section car share users tend to have professional jobs, be of above average education and relatively good incomes. The majority of car share schemes interviewed can be seen to have stayed within these parameters in their targeting of audiences. For instance, Shell Drive, Germany specifically targets their scheme to young (30-35 year olds) professional achievers living in urban areas (Shell Drive, 2004) and AutoShare, Canada approaches those who are 'not too rich, but not too poor either' (AutoShare, 2004). Smart Moves, on the other hand, had a number of criteria, they identified '23-35 and 50+ often pre-children, relatively well educated, environmentally conscious, good income in densely populated areas some interest in older students' (Smart Moves, 2004).

3.4.3 Bicycle Pooling Schemes

De Maio and Gifford (2003) highlighted commuters using public transport as possible users of bicycle pool schemes. This is reinforced with information gained from interviews with a number of the schemes. For instance Sandnes, Norway was keen to target train and bus passengers (Sandnes, 2004) and OV- fiets, Netherlands was even more specific identifying 'train passengers with their final destination at 1-5 kilometres from their arrival station' as its main target audience (Ov-fiets, 2005). The bicycle pooling schemes in Copenhagen, Sandnes and Vienna also sought to appeal to tourists visiting their cities. The Copenhagen scheme has instructions in English as well as Danish, and maps of the City Bike zone can be picked up at the local Tourist Information office (Copenhagen Tourist Board, 2005).

Some of the more community based schemes targeted specific sections of society. For instance as mentioned previously the Palmerston North Green Bike scheme in New Zealand targeted long-term unemployed and those with disabilities (Palmerston North, 2004). The Yellow Action Bikes in Kingston, Canada was an all-encompassing community scheme targeting an audience as broad as children, welfare recipients and neighbourhood families in the local vicinity (Yellow Action Bikes, 2004)

3.5   Summary

From the research we carried out with a number of mobility service schemes, it was apparent that the majority saw the importance of identifying a target audience to which to promote their scheme. Whilst a number of differences existed in the types of audience identified, the manner in which schemes set about researching such audiences was remarkably similar. For instance the majority of schemes carried out research on existing schemes be it through personal contact or simply researching the literature and websites of existing schemes. Conversely a number of schemes also commissioned market research, which was often carried out specifically in the area where the scheme was to be set up.

In relation to the types of audiences identified, this tended to differ between the different types of mobility scheme. For instance, with car pooling schemes the majority, if not all, targeted commuters travelling at peak times, in line with the objective of many such schemes to reduce congestion in local areas. With bicycle pooling schemes, on the other hand, tourists and public transport users were identified. Car share schemes however, had the most varied target audience. As highlighted above, these tended to hone in on audiences located in certain geographical areas such as those near to public transport hubs, neighbourhoods that had parking problems or, in the case of specific restricted membership schemes, residential developments. Moreover, a number of car share schemes also targeted specific types of people, such as

those with professional jobs and with above average education and who were environmentally conscious.

Increasingly car pool and car share schemes have also been specifically targeting businesses. For instance car pool schemes such as Intelligent Samåkning and Datessa are exclusively for business clients, as is car share scheme Sunfleet in Sweden. Moreover car share schemes such as Flexcar, AutoShare and Zipcar all offer services specifically designed for business clients.

4

The Marketing of Mobility Services

The previous two chapters have examined the rationale behind the setting up of mobility service schemes, and the audience that such schemes identified. This chapter focuses on two additional issues:

- Media used (Section 4.1).
- Content and Style of the Message (Section 4.2).

The chapter concludes by discussing a number of issues that arise in the course of the previous analysis (Section 4.3) and by summarising the findings (Section 4.4).

4.1 Media Used

In marketing mobility services to the user, a plethora of media types are available. Of course deciding on the best media with which to advertise individual schemes will depend in many ways on the amount of budget available. The majority of schemes are helped out financially by government support, in some cases this may be for a limited period. Whilst money is often earmarked for marketing purposes it is clear that budgets are minimal compared with, for instance, the amount of money spent by car manufacturers promoting their latest products. Accordingly, more expensive options such as television adverts and glossy magazine adverts and articles are often not available to mobility service schemes.

This section will address the types of media that tend to be favoured by schemes and explore how these have been undertaken to market individual schemes. It is clear from the research conducted that whilst the types of media used by schemes tend to be the same, the scale of advertising

employed differs greatly between schemes. The following types of media are covered in this section:

- Printed Information, such as leaflets, flyers and posters;
- Electronic Information, such as the internet;
- Free Media Coverage;
- Events and Face to Face Marketing;
- Paid Advertising, eg on radio and TV; and
- Sales Promotions.

4.1.1 Printed Information

Leaflets or **flyers** are one of the most commonly used forms of media employed by mobility service schemes. Indeed the majority of, if not all, schemes use leaflets in some form or another. Leaflets are a useful means of getting detailed information across in a relatively cheap way. As CarPlus UK point out:

> 'The cornerstone of most car clubs' promotion is the information leaflet. All clubs have them even if they print little else. People expect to be able to pick up such information leaflets – they are ubiquitous. Leaflets usually explain what the car club is, how the club works, what the benefits are and what it costs.' *(CarPlus UK, 2004)*

Whilst CarPlus UK refers to car share schemes this perspective is also relevant to both car and bicycle pool schemes. This is particularly useful for mobility services in view of the points made earlier in relation to the need for explanations of how schemes work. Accordingly, leaflets can explain the scheme in relatively fine detail, covering issues such as exactly how the scheme works, how much it costs and how to join. The nature of leaflets also allows for a wide distribution (again at a low cost), which can permit large numbers to be alerted to their content.

The scale on which leaflets are produced and distributed by schemes varies enormously. For instance this can range from relatively small amounts deployed by community schemes such as Yellow Bike Action in Kingston, Canada which distributed approximately 1,000 leaflets in the local community (Yellow Bike Action, 2004). Conversely Warrington Borough Council in UK had 35,000 leaflets produced that were distributed door-to-door to households in the area and 100 sent in a mailshot to the 100 top business organisations (Warrington, 2004). AutoShare, Canada distributes between 50,000-200,000 leaflets a year (AutoShare, 2004) and Smart Moves, UK, has had over 200,000 leaflets produced to provide information on the five schemes that it oversees. Like Warrington, it has distributed leaflets door-to-door in areas where it is setting up schemes and also has its leaflets as inserts in local newspapers (Smart Moves, 2004).

The use of ***posters*** is also commonly employed by mobility service schemes, and shares one of the same characteristics with leaflets in that they are a relatively cheap form of advertising. Distribution is a key issue in relation to posters, as is the design. Whereas leaflets allow a larger amount of detail and information to be contained, posters need to be eye catching and to convey the message in fewer words. However, posters can be located in key spots, which means that one poster can reach a wide audience. A number of schemes have used posters as part of their marketing campaign. The bicycle pooling scheme in Vienna, Austria made extensive use of this form of medium by placing posters carrying details of their scheme on over 900 billboards and 5,000 lampposts across the city (Vienna, 2004). Vrtucar, Canada had a number of large posters placed on sidewalk signs and others made up that they use at events (Vrtucar, 2004) and Teil Auto, Germany, placed large posters around the local town in key locations (Teil Auto, 2004). Smaller schemes such as Hour Car car share scheme in the UK and Yellow Bike Action placed posters in local shops and libraries, albeit on a much smaller scale (Yellow Bike Action, 2004; Hour Car, 2004).

4.1.2 Electronic Information

Advances in technology in recent years have meant it is now relatively common for schemes to make use of electronic information such as the ***internet*** and ***email***. Similarly, large numbers of people increasingly have access to the internet and mobile phones. Subsequently this has led to an increase in purchases or bookings over the internet or by telephone. Indeed the majority of schemes have elaborate websites, which not only provide details of their schemes, but in some cases allow cars/bicycles to be booked online, or for car pool scheme users to find suitable matches for their journey requirements. Similarly the majority of schemes have email addresses that allow interested parties to email requests for further information and details.

AutoShare, Canada has an extremely comprehensive website that provides detailed information for both new and existing customers. Not only does it explain how the scheme works but it also provides a history of the scheme and gives details on the pros and cons of participating in car sharing. It also provides useful statistics, articles on car sharing and links for corporate and NGO clients and maps giving details of the location of vehicles (AutoShare, 2005). However, this is just one example of a good website. Indeed the majority of mobility service schemes seem to understand the importance of providing an easy to use and detailed website for users, and potential users, to access.

Some exceptions to the rule are the smaller community-based car share and bicycle schemes which do not have websites and instead rely on other methods of advertising their schemes. For instance both the Palmerston North Green Bicycle scheme, New Zealand and Yellow Bike Action, Canada have email addresses, but do not, at the time of writing, have a website. Similarly, the bicycle pooling scheme in Sandnes, Norway which started in 1996 only

began developing a website in 2004 (Sandnes, 2004). This is also the case for some car pool schemes, particularly closed schemes, which use methods other than electronic databases to match suitable journeys with users.

4.1.3 Free Media Coverage

Free media coverage is particularly important for mobility service schemes. As previously mentioned marketing budgets for schemes are often limited, therefore ensuring free publicity for schemes is paramount. Since mobility service schemes are still a relatively new concept in many countries they often receive attention from the media. Combined with the increasing number of local newspapers and radio stations looking for local interest stories, the scope for covering mobility services is quite high. Often the best way of achieving coverage is through press releases. A number of mobility services schemes have made use of these to ensure interest in their schemes.

Numerous schemes have benefited from **newspapers** running 'free' stories about their schemes. For instance AutoShare, Canada has had approximately 24 features in both local and national newspapers promoting their scheme since it was launched in 1998. These stories have highlighted the scheme from a number of different angles. For instance a couple of articles focussed on the high costs of parking spaces when purchasing a condominium, which is estimated between $10,000 to $35,000 depending on the building and the number of parking spaces provided. This was then linked to the AutoShare car share scheme to explain how joining it could save users both money and be a 'convenient and hassle-free way to get around the city' (National Post, 2004). Other articles have taken more of a human interest angle focussing on the coordinator, Kevin McLaughlin, which has then provided him with a platform to discuss the scheme in more detail (AutoShare, 2004).

Similarly, **local radio stations** are also often interested in carrying stories on matters of local interest and are an ideal medium to make use of due to the wide coverage radio has. The Stroud Valleys Car Club, UK was particularly astute in gaining a high level of coverage with a local radio station. They were aware that local radio BBC Gloucester were having a 'Green Day' which involved running stories on environmental issues of interest in the region. The organiser of Stroud Valleys Car Club got in touch with the radio station but due to programming schedules the BBC would not be able to visit the scheme. Stroud Valleys Car Club then offered their services for transporting the roving reporters around the region, which the BBC accepted. In turn the club was continually mentioned throughout the day on air and received several enquiries as a result from interested parties (CarPlus UK, 2004). Similarly, Palmerston North Green Bikes, New Zealand was also able to make use of a local radio station. They were provided with free local community adverts and talk back time to allow them to appeal for donations of bicycles to use for their scheme (Palmerston North, 2004). Warrington Borough Council's car pool scheme was given two minutes of free airtime at the launch of their scheme (Warrington, 2004) and Auto Teil, Germany also managed to

get a free local radio report giving details of their car share scheme (Auto Teil, 2004).

Television is a particularly high profile form of media and free coverage tends to be more unusual than with radio and newspapers. However, occasionally local television news programmes do cover human interest stories such as mobility services. Hampshire County Council, UK were able to get their car pool scheme featured in a five-minute regional prime time television news programme (Hampshire, 2004), and Palmerston North Green Bikes scheme, New Zealand appeared on a national TV news show that was promoting recycling (Palmerston North, 2004).

Interestingly, the Copenhagen City Bike, Denmark, spends little on marketing, and relies heavily on the use of free media coverage. Subsequently the scheme uses a number of **innovative publicity stunts** to ensure the general public are made aware of the scheme. For instance, City Bikes are available during 4 May until 15 December each year and to ensure publicity for the start of the season the City Bike Foundation which oversees the scheme hold city bicycle races which involve famous personalities and the auctioning of city bikes that have been decorated by well known artists (Bycyklen, 2004).

A number of publicity opportunities exist for car share schemes in conjunction with the motor industry. For instance, schemes associated with a well known company within the motor industry can benefit in various ways. Mobility, Switzerland, engages in marketing and partnerships with a number or motor manufacturers with which it has dealings, for example Renault. Mobility owns approximately 20 different models of Renault cars and this allows Mobility the opportunity to show its customers that it has the latest models and thereby profile itself as a company in the forefront of development. Conversely, Renault benefits from this partnership by being able to demonstrate its latest models on the street (Mobility, 2005).

4.1.4 Events and Face to Face Marketing

Events are another relatively cheap source of marketing which can help raise the profile of mobility schemes. This can range from having a display at a village fete to participation in a more organised event such as In Town Without My Car Day. Presence at such events allows interaction with members of the general public. This can be particularly useful as explaining how mobility schemes work can be done on a one-to-one basis when time permits a more detailed description of how schemes work. It can also be a two-way process allowing for interaction, including, for instance, allowing for questions to be pitched at those promoting the scheme.

South Gloucestershire County Council has used employer roadshows at various locations across the Borough allowing them to showcase leaflets and posters detailing their car pool scheme (South Gloucester, 2004). Similarly,

Warrington Borough Council has organised a number of events to promote their car pooling scheme. These range from exhibitions in a local hospital and three large local organisations, to giving presentations to parish councils and community groups (Warrington, 2004). In Vienna, Austria, the bicycle pooling scheme has been promoted at publicity stalls across the city (Vienna, 2004) and Vrtucar has a special event booth which they use to promote their scheme at various events (Vrtucar, 2004).

Furthermore, again there is scope for car share schemes to make use of partnerships with the motor industry. Mobility, Switzerland recently participated in joint marketing efforts with Fiat, participating at the Automobile exhibition in Geneva where a Fiat car was shown displaying the Mobility logo (Mobility, 2005). Citroen's sales agent in Finland has sponsored City Car Club promotion tours with presentations in shopping malls and exposition of vehicles (City Car Club, 2004). In the US, Zipcar is in partnership with Toyota, through which ii has demonstrated the Toyota Prius hybrid at the New York Grand Central station in front of 0.5 million people (Zipcar, 2005). In the UK, Vauxhall has sponsored CarPlus UK events, including an evening reception with government representatives and hosted one of CarPlus UK's conferences on car sharing (CarPlus UK, 2004).

Face-to-face marketing is also very useful as again it allows detailed information to be given to a particular audience about mobility service schemes. The Fahrgut Car Share scheme in Germany, believes that spreading details of their scheme by word of mouth and giving presentations at various meetings is one of the most useful ways of promoting what they do (Fahrgut, 2004). Car share providers AutoTeil, Germany also participates in a number of talks/lectures to interested parties. StattAuto, Germany has a drop-in facility twice a week where people can attend an hour-long meeting to learn about how its car share scheme works. StattAuto found they had to limit this to two days a week as they were experiencing people turning up at different times each day and it was preventing them from getting any work completed, as they were continually having to provide explanations on the intricacies of the scheme (Janes and Bryant, 1996). Car pooling scheme Intelligent Samåkning, Sweden, also believes that personal contact with, in its case, individual organisations that it is keen to sign up, is this most productive way of promoting the services they can offer (Intelligent Samåkning, 2004). Similarly Datessa, car pool scheme in Sweden contacts potential client organisations on a one-to-one basis, initially by telephone. It estimates that approximately 1,000 organisations have been contacted in this manner (Datessa, 2005).

4.1.5 Paid Advertising

The extent to which mobility services can pay for advertising necessarily depends on the amount of budget available to spend on marketing. Clearly this varies between schemes and is apparent through the differences in the scale and types of media employed. Some schemes such as Commuter Connections, US, had a substantial budget for marketing purposes and were

able to spend $1million in its first year on *television and radio adverts*. These adverts were undertaken in a testimonial style featuring a number of different characters discussing their use of the scheme. However, lack of funding in the second year meant that the use of television adverts was uneconomic: 'Since the budget is smaller this year, we have eliminated TV from the campaign'. Accordingly, a switch to cheaper forms of marketing occurred including the sponsoring of radio traffic news reports and advertisements on the back of buses (Commuter Connections, 2004).

Making use of advertising space on *bus backs* is a popular form of marketing for mobility services. Bristol City Car Club, UK paid for 200 posters on buses to run for a number of months along with ten bus shelter posters for a month (Bristol, 2004). A number of local authority schemes in the UK have promoted their car pooling schemes using bus advertisements. For instance, Warrington Borough Council paid for three months' worth of bus back signage (Warrington, 2004) as did Dorset, Poole and Bournemouth Councils collectively as part of their Carsharedorset car pooling scheme, which had over 40 adverts on the lower rear of buses for one month across the county (Poole, 2004). According to CarPlus UK, in some instances adverts on buses promoting car share schemes are part sponsored by public transport companies. This occurs when public transport providers are keen to work in partnership with car share schemes; as such initiatives often result in members using public transport more frequently. CarPlus UK also point out that a number of car share schemes outside the UK have used adverts on public transport to great effect. For instance, they cite the examples of Zipcar in the US who have used adverts targeting subway users and AutoShare in Canada's use of public transport adverts have also found to have been successful (CarPlus UK, 2004).

The use of radio was mentioned previously as a useful means of reaching a wide audience. Accordingly, a number of schemes have made use of this form of media and paid for radio adverts to promote their schemes. The Borough of Poole's car pooling scheme Carsharedorset, devised two different adverts which were played four to five times a day for two weeks leading up to the launch of their scheme (Poole, 2004). Similarly, Warrington Borough Council's car pooling scheme was advertised on local radio over an eight-week period (Warrington, 2004). As mentioned above, Commuter Connections, US used testimonial-style radio adverts in the first year of their campaign and later switched to the sponsoring of radio traffic news reports (Commuter Connections, 2004).

Other more innovative forms of paid advertising include Warrington Borough Council's payment for a one-year pitch *hoarding advertisement* at the local rugby league club and a half page advert in the club's match programme promoting the car pooling scheme. More recently a number of local authorities in the UK have advertised their car pool schemes on local road signs.

Just one example of this is the South Gloucestershire car pool scheme shown on the left, which uses **road signs** with details of the scheme at congestion hot spots in the area. These signs are moved to different locations on a regular basis to ensure they are seen by as wide an audience as possible. According to the coordinator of the scheme 'If you're stuck in the traffic in the non-HOV (high-occupancy vehicle) lane and you're crawling along, you see the sign and they can see how you can take advantage of the 2+ lane.' (South Gloucester, 2004; BBC, 2003).

4.1.6 Sales Promotion

The use of *free giveaways* or *discounts* on joining schemes is another way of advertising mobility service schemes. AutoShare, Canada in particular has a number of 'special promotions' to new and existing members. These range from $60 referral credits for members that sign up a new user and retail discounts at environmental, outdoor and organic shops. Moreover they also participate in an innovative scheme in conjunction with the Clean Air Foundation, which is an organisation which works on air quality issues in Ontaria. The Clean Air Foundation has set up a scheme entitled 'Car Heaven', which deals with end of life vehicles. Anyone donating a vehicle to be recycled is eligible for $100 discount on AutoShare membership, AutoShare also provides a number of vehicles at residential areas such as the RadioCity and MOZO (Modern Living Zone). A number of savings are available for residents including a 50% discount on membership and the waiver of insurance approval fees (AutoShare, 2005).

Other schemes hand out promotional items containing details of their websites to highlight the existence of their schemes. For instance, Hampshire County Council has had a number of stress toys and post-it notes bearing its scheme's logo and website details (Hampshire, 2004). Similarly, Poole Borough Council has *inter alia* promotional key rings, car stickers and tax discs all displaying its scheme's logo and website address (Poole, 2004).

4.1.7 Summary

Mobility services, therefore, often use a number of different forms of media in the course of their marketing. This could be a mixture of *inter alia* leaflets, posters, radio adverts and websites. Obviously the amount of information contained in a leaflet or on a website is a lot more than that which can be fitted onto a poster. Therefore, whereas a poster may concentrate on one main message, a leaflet or website may contain numerous points or messages. Carplus UK makes reference to this so called 'twin approach' which is often employed by car share schemes (Carplus UK, 2004), but it is also prevalent in other mobility services, and indeed other forms of marketing in general. This is where a primary message, such as cost savings would be the main focus of the advert and then a secondary message, such as the environmental benefits is included but to a lesser degree.

The media used by mobility service providers to market their respective services depends, to a large extent, on the funds they have available. Few schemes have, to date, made use of television, while a some paid for radio advertising. The most common forms of media used are leaflets and posters. These have the advantage of being relatively cheap and leaflets, in particular, can include a lot of information about the scheme, which is important for relatively new services, such as mobility services. Leaflets can be widely circulated to target areas, eg through direct deliveries to doors or as inserts in local papers. Posters on the other hand, while not potentially containing as much information as a leaflet has, if displayed in an appropriate location, the potential to be seen by a large number of people. The relatively recent development of the internet, and other electronic information, has opened up new opportunities for mobility service providers, as websites can be both eye-catching, and contain detailed information.

Due to the limited budget of mobility service providers, free advertising is particularly sought after by a number of schemes. With local media, including newspapers and radio and even television, on the constant look out for local interest stories, new mobility service schemes are a potentially fruitful source of such stories, which are exploited by service providers for free publicity. Other schemes run innovative events, eg bicycle races, to announce their launch, or take part in other events, such as the 'In Town Without My Car', days, to promote themselves to the public.

4.2. Content and Style of the Message

As noted in the previous section, when mobility service providers undertake marketing they rarely focus on just one message to sell their scheme. In many ways this makes sense as despite the majority having target audiences at which to direct their marketing, ideally they will still want to appeal to this audience on as many levels as possible, as well as appealing to a wider audience at the same time. On the whole, our research suggests that the type of messages used within marketing material can be categorised as focusing on the following benefits:

- Reducing the environmental impact of their travel;
- Easing congestion;
- Cost savings;
- Time savings; and
- Convenience.

As discussed, above, one of the particular aspects of the marketing analysis was to assess the extent to which the motivations that led to a particular scheme being set up in the first place were reflected in its marketing. Hence, the content and style of the marketing of schemes is discussed within this context. In other words, mobility service schemes in this section are discussed

in the context of the motivations underlying their original creation. Hence, this section is structured as follows:

- Environmental concerns (Section 4.2.1);
- Congestion (4.2.2);
- Accessibility (4.2.3);
- A planning requirement (4.2.4);
- Profitable venture (4.2.5); and
- Tourist attraction (4.2.6).

As noted in Chapter 2, not all schemes fit neatly into these categories and some overlap occurs. Nevertheless, it is still useful to view them in terms of these distinctions to help understand any effects this may have on how they market their schemes.

4.2.1 Environmental Concerns

For those schemes that were set up with environmental motivations, it is not surprising that an environmental message tends to feature prominently in their marketing. For instance car share schemes that use alternatively-fuelled vehicles such as Sunfleet car share scheme in Sweden, which runs a fleet of electric, electric-hybrid and gas-hybrid vehicles, specifically market themselves on their environmental credentials. Sunfleet uses leaflets and a website to advertise the scheme. There is also a mobility centre in Gothenburg that promotes the scheme. The strapline *'A green car when you need one'* features on the leaflets and the website and reinforces the primary environmental message that is promoted throughout the rest of their marketing. As this scheme is intended for business clients only, the leaflets and website are presented in a straightforward and factual manner. Sunfleet is also making use in its marketing, of the fact that Sweden is currently taxing the benefit of having a reserved parking space outside offices, but exemption for car sharing cars exist (Sunfleet, 2005).

Hour Car car share scheme in the UK was set up with environmental concerns in mind, and was the first scheme in the country to run its vehicles on bio-diesel. The use of biodiesel features prominently in Hour Car's marketing of its scheme. Leaflets and posters produced to advertise the scheme go for a factual approach and sport the following staplines *'The Car You Want – When You Want It – And Its Green And Clean Too'*. Also included are references to the environmental benefits of the scheme with the following text *'All cars use Bio Diesel – made from plant oils. Harmful emissions reduced by as much as 50%. Carbon neutral – only as much CO^2 produced as the plants absorbed.'* (Hour Car, 2005) The scheme also has the strapline *'Running the greenest car share scheme in Britain'* on its company's headed paper. Similarly the website also makes mention of the environmental aspects of the scheme. Whilst the primary message is environmental, a number of secondary messages are also found in

Hour Car's marketing material. These include the convenience of using the vehicles and the cost savings of using the scheme.

A number of German car share schemes which emerged in response to environmental motivations, similarly use a primarily environmental message in their marketing. For instance, Stadt Teil Auto Munchen, emphasises the environmental benefits of the scheme in a leaflet they produce. The strap line '**Brauchen Sie ein ganzes Auto?'** translates as '**Do you need a whole car?'** (Stadt Teil Auto, 2005).

On the right is an early example of marketing produced in the late 1990s. The logo featuring a car with a flower in its mouth has environmental connotations. The scheme's website also has a strong emphasis on the environment, discussing the problems with having so many cars in society. The content of the leaflet is presented in a factual manner, with details of how the scheme works and the benefits of joining (Stadt Teil Auto, 2004).

Another German car share scheme Auto Teil, was also keen to push the environmental message in their marketing. For instance the coordinator of the scheme believes that 'Environment is more important than ever before, and the increasing oil prices should be another reason to make people think more of trying car sharing' (Auto Teil, 2004). Whilst the environment was the primary message contained in its marketing it pointed out the costs associated with having a car (and a second one) and that a car share scheme prevents users having to worry about the condition of their vehicle or any repairs that might need doing.
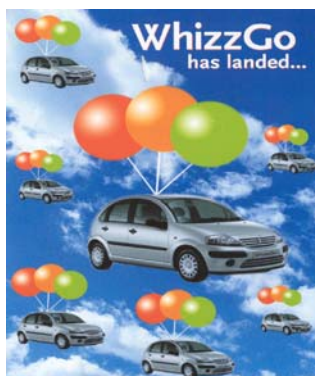
Interestingly, however, not all schemes with environmental motivations used environmental messages in their marketing. For instance car share schemes such as Mobility, Switzerland and Whizzgo, UK, produced a number of flyers/leaflets which made no reference to the scheme's environmental benefits. Rather the emphasis was on cost and time savings, and convenience. For example, Whizzgo is a new scheme that was launched in 2004 with the objective of improving the local environment. 15,000 leaflets were produced and distributed door-to-door in the local area. These leaflets showed the image of a car with balloons and with the words 'Whizzgo has landed...'

On the other side there are details of how the scheme works with reference to the costs that can be saved by using Whizzgo and the convenience of having a number of cars located close by. The strapline **'A car when you want one!'** is featured twice. Obviously this leaflet was designed to alert people to the launch of the scheme, accordingly it will be interesting to see

how and if the marketing changes as the scheme matures. Whilst both Mobility and Whizzgo do not market the environmental aspects of the scheme, as with many other schemes, reference to the potential environmental benefits do appear on both of their respective websites.

4.2.2 In Response to Congestion

As outlined in Chapter 2, the majority of schemes set up in response to congestion were car pooling schemes. From assessing the marketing materials available from such schemes it was apparent that a message relating to how the scheme could help ease congestion did feature prominently in a number of the campaigns. This was particularly the case with radio adverts employed by car pooling schemes. For instance Commuter Connections, US, commissioned a radio advert featuring a blues type song called the 'commuter blues' where the singer tells of their despair at being stuck in traffic each morning on their way to work. A voice-over then informs the listener of the Commuter Connections car pooling scheme along with a telephone number and web address providing additional information on the benefits of the scheme. The advert is directed towards their identified target audience of single occupancy vehicle commuters aged between 25-54 (Commuter Connections, 2004).

Commuter Connections, also commissioned a number of television adverts. Initially these were testimonial style adverts with individuals describing the problems they face from commuting to work and how the Commuter Connections scheme can help – offering the website address and a telephone number to find out more information about the scheme. The main strap line for the adverts are **'Flexible Solutions for a Better Commute'** along with **'A smarter way to work'**. The adverts are very business-like and the coordinator of the scheme states that the primary messages are the time and cost savings from participating in the scheme through 'appealing to the emotional sense of frustration with traffic'. A secondary message is the environmental impacts of taking part in car pooling (Commuter Connections, 2004).

The UK Borough of Poole's Carsharedorset.com scheme, also used a radio advert to inform commuters how to join their car pooling scheme, this also had a congestion related theme (see transcript below).

> Interior of car, engine running gears changing etc
>
> **What if everybody in Dorset shared a car journey to work? Not the <u>same </u>car obviously. But imagine how that would help congestion, not to mention the petrol money you'd save.**
> **Well the Councils have put together just such a scheme called Carsharedorset.com <u>and</u> it's free!**
> **Carsharedorset.com call 08700 11 11 99**
> (Carsharedorest.com, 2004)

Radio adverts are a useful tool for car pooling schemes, whose main target audience is commuters, as radio allows access to a large number of listeners who are commuters sitting in their cars (possibly struck in traffic). Indeed, this tactic of reaching commuters whilst actually experiencing congestion through the use of radio adverts was also employed by a number of other car pooling schemes (see Section 4.1.5 and Box 4.1).

In addition to the use of radio adverts, car pooling schemes also made wide use of other forms of media such as posters, leaflets, bus backs and websites. Warrington Borough Council, UK used the following advert which featured on a bus back. It contains a clear reference to reducing congestion.

Moreover, the majority of car pooling schemes use leaflets as a large part of their marketing campaign and a mixture of messages are used. Alongside the congestion message, the time and cost savings featured prominently in a number of cases. For instance, the Warrington Borough car pool scheme includes this excerpt from its leaflet advertising the scheme.

REDUCED COSTS

The cost of driving your own car is considerably more than the cost of the petrol you use. Although you must not make a profit, sharing your journey means that you can share the cost. According to recent figures from the AA the true cost of driving an average 1000cc car doing 43 miles to the gallon when taking into account petrol costs, depreciation, excise duty, insurance, repairs, parking, interest on any loans and replacement parts is about 31p a mile and for 2000cc car this figure rises to 59p a mile!

(Warrington, 2004)

Using a cost and time saving message makes sense, as the main target audiences are commuters and local businesses, therefore presumably the main factors that will appeal to them are costs and time saving.

Another message found in the majority of written marketing materials promoting car pool schemes is the issue of security.

How safe is it?

The safety of members is a priority and the website is secure as it can be.

Your email address is kept hidden at all times. The only information that is visible to other users is your 'usually called' name, your smoking preference, and the journey details you added.

Every member is responsible for his or her own safety. Some simple security measures include:

- Avoid exchanging home addresses with your travelling companion before you meet them.

- Arrange to meet in a public place.

- Inform a friend or family member of who you will be travelling with, when and to where.

- Show each other your I.D - so you know you're travelling with the right person.

- You are under no obligation to go ahead with any *liftshare*. If you have any doubts about your travelling companion, you should avoid travelling with them.

- It is advisable to let your insurer know that you are registered in a lift sharing scheme. This should incur no additional cost.

For instance, on the left a part of the leaflet produced by Hampshire Council advertising their car pooling scheme is reproduced. It provides a list of safety tips to users to ensure personal safety is maintained (Hampshire, 2004). Personal safety issues have been highlighted as being important, so a number of schemes include some reference to such issues on leaflets and websites. The coordinator of the Vodafone car pooling scheme also highlighted the importance of including security issues in any marketing (Vodafone, 2005).

(Hampshire, 2004)

Box 4.1: SOUTH GLOUCESTERSHIRE, Car Pool, UK

South Gloucestershire car pooling scheme was set up to alleviate congestion and its target audience was commuters in a specific area which included key businesses located on the ring road and north fringe of the area. Accordingly the main focus of the radio adverts that were commissioned was focused on congestion and were aimed at commuters, as it was felt that if people were stuck in traffic on the way to work whilst listening to an advert about congestion and how to contribute to reducing it then this would have effect. Alongside the radio adverts, South Gloucestershire also produced a number of posters, leaflets and car stickers as part of their marketing campaign.

The coordinator highlighted that originally leaflets and posters were designed in traditional 'council style' (factual style) language, however it was decided that this was not working and needed to be changed into language that appealed to the general public more. Accordingly a cartoon style was chosen which has now become part of the logo brand used on all marketing.

Whilst the radio adverts' primary message was related to congestion, the poster campaign focused more on savings – both time and cost. For instance a series of posters were designed using the logo to the left and the strapline *'Is anyone going your way'* with different characters featuring in the vehicle depicted in the logo each time.

The posters below show a nurse sharing with a builder and focuses on the time savings that could be made from car pooling. Conversely, another poster in the same series concentrates on the money savings that could be had.

Of particular interest is the conscious decision to steer away from a purely environmental message (although environment benefits of the scheme are noted on the website). The coordinator of the scheme stated that 'We were aware that people respond to different messages and everyone has different buttons that can be pushed. The environmental message alone in itself is rather weak, although will appeal to some people'. Accordingly, a conscious decision was taken to market the scheme using a variety of different messages that would broaden the appeal to the widest audience possible (South Gloucestershire, 2004).

4.2.3 Improving Accessibility

The marketing employed by schemes which emerged as a result of improving accessibility are of particular interest, as, for example, it seems unlikely that any scheme would purposely try to market itself on this particular issue as 'accessibility' is not something that tends to be readily understood by the general public. For Yellow Action Bikes, Canada the choice of how to market the scheme was relatively straightforward. As mentioned previously in Section 2.3, whilst the main aim of the scheme was to help improve accessibility amongst members of the community on social assistance and children from disadvantaged backgrounds, the scheme was also concerned with improving environmental conditions in the local community.

Indeed, in the early days of the scheme this was chosen as the main focus of the marketing campaign employed by Yellow Bike Action, with leaflets and posters including strap lines of *'smog kills – ride a bike'* and visuals of an old dusty bicycle in a garage being transformed into a shiny new bicycle. However, as the scheme grew in size the coordinator highlighted that increasingly more information about the actual programmes they were running began to be included in pamphlets. Furthermore, rather than just advertising the scheme's existence the scheme started putting classified adverts in newspapers to solicit volunteers and bicycles to be used in the scheme. As the number of volunteers increased, Yellow Bike Action were able to increase the number of talks and to man information stands at various events which allowed them to advertise their scheme on a more one-to-one basis and meant that, increasingly, all of the main messages for selling

mobility services – reducing environmental impact, easing congestion, cost and time savings and convenience – could be put across (Yellow Bike Action, 2004).

On the other hand, car share scheme City Wheels, UK, which was designed to encourage people to move back into the city centre, made a conscious decision to market its scheme in relation to selling a particular type of 'lifestyle'. This moves away from the more common themes contained within the table. Rather the scheme wanted to show that the city is the place to live and that car ownership is not essential as everything is close to hand, but at the same time access to a car is possible where necessary. This 'lifestyle' message was the primary message included in a newsletter produced for housing association tenants and was also promoted at a number of open days held to inform people about the car share scheme. The strapline '***Enjoy living in the city with City-wheels.co.uk'*** further emphasises these points. As with the majority of other schemes however, City Wheels' website did include secondary messages detailing the convenience and cost saving benefits of joining (CityWheels, 2004).

4.2.4 In Response to a Planning Requirement

In a similar vein to the previous category, those schemes set up in response to a planning requirement are unlikely to market themselves on this issue. The majority of examples of schemes emerging in response to a planning requirement were either car share or car pool schemes. These tended to be as a result of business organisations extending their work premises or relocating to a new site, or to be attached to a new housing development.

For those schemes that emerged as part of a business' planning requirement the majority if not all were car pooling schemes. As with those car pooling schemes which emerged in response to congestion similar messages were contained in the marketing employed in these cases, with an emphasis on how the scheme could contribute to reducing congestion in peak hours for commuters and also the time and cost savings for individuals taking part. The Vodafone car pool scheme was promoted to its employees through the use of a cartoon style poster and a glossy brochure that was circulated to staff on an annual basis, containing details of the scheme. The coordinator of the scheme outlined how it was decided to use a range of messages – from the environment to cost and time savings – as it was felt that this would appeal to as many people as possible. Again, as highlighted in the previous section, the issue of security was also a prominent feature in the marketing used by Vodafone, as it was felt that this was a major concern of most people considering taking part (Vodafone, 2005).

On the other hand those schemes that emerged as a result of planning requirements for housing developments tend to be car share schemes. For instance in the UK, the BEDZED housing development had a car share scheme included for its residents to use. The inclusion of a car share scheme fitted

into the ethos of the development which aimed to provide environmentally friendly energy-efficient housing and work space. Whilst marketing of the scheme was carried out other factors also helped promote the scheme. For instance, residents were required to pay £200 annually for one of a limited number of parking spaces. Although to help encourage clean fuelled vehicles a reduced rate was available for LPG (liquid petroleum gas) vehicles, and free parking was given for electric vehicles (BEDZED, 2005).

4.2.5 Profitable Venture

As highlighted previously, mobility services that are set up with the primary aim of being commercially viable tend to be car share schemes. Shell Drive, Germany, was set up as a commercial venture and made its presence on the German car share market by acquiring a number of existing car share schemes already in operation. It initially ran a six-month pilot scheme in Dusselforf starting in 2003. The success of this scheme led to a permanent operation being launched in January 2004. The marketing employed by Shell Drive makes use of a number of messages in their leaflets and flyers.

The strap line featured on their leaflets *'Shell drive Ihr Auto auf Zeit'* translates as *'Shell drive your temporary car'.* The content of the leaflets build on this strapline focusing on the ease and convenience of using its vehicles and how a variety of different Shell Drive vehicles can be hired for as short a period as an hour. The leaflets also point out the cost and time savings that can be had by users of the scheme and is directed at their identified target audience of young professional achievers in urban areas, which is reinforced with a number of photos of young people using the vehicles on the leaflet (ShellDrive, 2004).
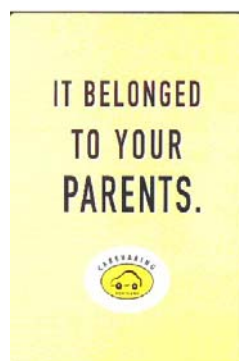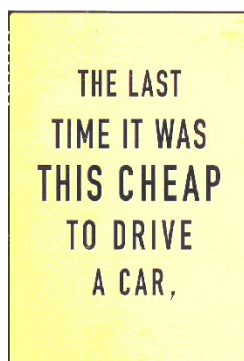
Some schemes present their marketing in a humorous example (see Box 4.2). Car Sharing Portland, US also opted for a humorous advert as part of their marketing campaign. Car Sharing Portland was the first commercial car share scheme set up in the US, which has now merged with Flexcar. They produced a number of different marketing materials including leaflets, posters and stickers. As shown below, one leaflet features the caption *'The last time it was this cheap to drive a car,'* on the front page. When you open the leaflet up it reads *'It belonged to your parents.'*

The remainder of the leaflet gives detailed information on how the scheme works including the location of cars, how to join, price tariffs and a

comparison of the costs of using the scheme as opposed to owning a private vehicle. It also has a specific section on the environmental effects of car use. Moreover, it features a testimonial of a user praising the scheme. Indeed all the main messages that are used by mobility services – in other words, also time savings, easing congestion and convenience – are present in Car Sharing Portland's leaflet (Car Sharing Portland, 2005).

Box 4.2: ZIPCAR, Car Share, US

Zipcar, US has produced a variety of different types of adverts using a mixture of the various messages discussed above.

The example on the right shows a humorous attempt to engage the public by provoking thought about the time spent by drivers looking for a parking space. This poster highlights the time savings that can be had by using a Flexcar. Despite the humorous connotations the advert is still informative as the bottom part of the poster explains in simple steps how the scheme works.

Zipcar has also produced posters to be displayed at public transport hubs, aimed at targeting public transport users. Again the approach is a humorous one with the caption *'Public transit But you get to steer.'* This time the focus is on the convenience aspect of using Zipcar. As with the previous advert, the poster also contains the bottom section which explains how the scheme works.

More recently Zipcar has produced some new marketing material. The strapline '**wheels when you want them'** with the image of a '**Z'** on wheels portrays the message of how Zipcars are quick and convenient to use. This logo has been used on stickers and also on the website. A series of posters have also been designed with the strapline '**zipcars live in your neighbourhood. For work or play'** accompanied by a number of references as to how the scheme works and the cost implications. This is a move away from a humorous message to a much more factual one.

As mentioned in Section 4.1.2 car share scheme AutoShare, Canada have a comprehensive website that provides detailed information for both new and existing customers. Within the website there are separate sections for the

general public and businesses. The specific targeting of businesses is also apparent with a number of other car share schemes (see Box 4.3). Whilst the information differs slightly in the sections for the general public and businesses, the messages contained are the same. Indeed, AutoShare has designed a logo which can be seen below, and is used in both sections of their website. This logo portrays the cost and time savings and the environmental benefits that can be had from joining the scheme. Whilst the convenience message is absent from this logo, the convenience of using the scheme is implied on the website.
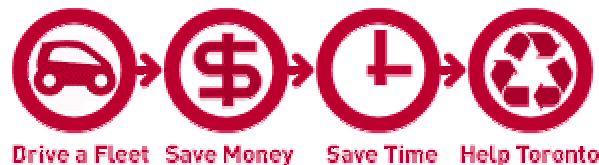
There are a number of variations of this logo which have been used on a variety of different materials *inter alia* leaflets, flyers, full page newspaper adverts and information brochures. For instance one leaflet which is designed for general public use features a variation of the above logo. Inside the 'Save Time' is replaced with an 'Avoid Stress' which shows a smiley face instead of a clock. The leaflet explains the ease of joining the scheme, location of vehicles and, as with the text contained on the website, contains messages relating to addr4essing congestion and pollution. It is interesting to note that a similar logo is also used by Zipcar (see Box 4.2), which can be found in the bottom section of the majority of their marketing materials.

AutoShare also has a number of schemes linked to condominiums, where cars are available on site. Accordingly, AutoShare have designed a number of glossy A4-sized flyers each branded with the condo in question. The leaflets then give details of how residents can use their vehicles. The strapline *'On-site, hourly car rental by AutoShare'* is featured on the front side, and on the reverse *'Why own when you can rent by the hour?* The leaflet gives details of how to join the scheme and information on the different payment plans available, focusing heavily on cost savings and convenience. Indeed in relation to the cost savings it contains a section on how AutoShare can help pay off your mortgage faster.

AutoShare also used local, regional and national press to market the scheme. As mentioned in Section 4.1.3, they managed to get approximately 24 articles about the scheme in the press since it was launched in 1998. A number of these focused on the availability of AutoShare vehicles at local condominiums, but also general stories on how the scheme works and why people should join up (AutoShare, 2004).

Box 4.3: FLEXCAR, Car Share, US

Profit-making car share scheme Flexcar uses a plethora of marketing materials along with a variety of messages contained within these. For instance, Flexcar have produced a number of different leaflets, flyers, postcards, car stickers and posters aimed at different types of users. The majority of Flexcar materials include either the strapline *'Shift Your Thinking'* for those aimed at the general public, or *'A Better Way To Drive Business'* for those targeting a business audience. As with much other car share marketing, the main text in the leaflets explains how the scheme works, details of membership fees and locations of vehicles. Those directed at businesses focus heavily on the cost saving that companies can make through reduced insurance and mileage costs and also how the scheme can help reduce parking problems on site (Flexcar, 2004).

From reviewing the marketing material produced by Flexcar it is clear it made a conscious decision to focus on using as many messages as possible. However, not only has it included all the messages together in one leaflet, and on the website, they have also chosen to produce a series of marketing that individually focus on just one message. For instance, Flexcar produced a series of postcards, each one with a primary message. One postcard contains the caption *'Don't read this if you enjoy making car payments'* – and then goes on to list the cost savings that can be had from joining the scheme. Another one reads *'For people who are not into long term commitments',* which goes on to highlight the convenience of the scheme, promoting the flexibility of not having to sort out car insurance, car payments and always being guaranteed a parking space.

Another two separate postcards contain the phrases *'Smog'* and *'Gridlock'* on one side of the postcard, with the reverse side containing information on the environmental aspects of the scheme. The reverse side shows how using the Flexcar service allows members to have access to a car, but at other times can use other sustainable modes of transport such as public transport or car/vanpools. It also highlights that the vehicles available use alternative fuel (Flexcar, 2004).

4.2.6   Other Rationales

When the Sandnes bicycle pooling scheme in Norway was set up in 1996 it was intended to target inhabitants of the city running errands in the town centre, bus and train passengers and tourists (to a lesser degree). Accordingly the marketing material that was produced was directed at residents of the city. Indeed, those responsible for the Sandnes, Norway

bicycle pooling scheme carried out quite unique marketing. For instance articles describing the scheme were distributed in newspapers and door to door written and signed by the Mayor of Sandnes, Mangor Eikeland. Whilst this in itself it not that unusual the tone of the articles, as described below, was.

Entitled **'Bsykkelen – et fremtidsrettet, miljøvennlig og helsemessig fremkomstmiddel i bysentrum'** this translates as **'a future oriented, environmentally friendly, healthy means of transport in the city centre'.** The remainder of the article goes on to talk about the health benefits of using the bicycles and how they are environmentally friendly and can be combined with public transport use. This ties in with Sandnes' membership of the World Health Organisation's Healthy Cities Programme. Another quote (translated) is that '**the bike is the future for comfort, clean environment and good healthy transport striving for a clean and attractive city centre'.** Of most interest are the Mayor's references to how using the scheme will demonstrate the citizens of Sandnes' patriotism towards their city. With references to how Sandnes is the best city in Norway and that by using the scheme its citizens will help create a nicer city centre. In addition to a patriotic message on these articles a number of posters were also designed with this type of message, alongside photos of the bicycles available, and accompanying text stating details of how to register and access the bicycles (Sandnes, 2004).

The Citybike scheme in Vienna, Austria was set up with a broad target audience of **'enthused persons who like to ride bikes in the age from 14 – 60 years (67% male,33% female)'** (Vienna, 2004). Eye-catching marketing material was produced which has been placed in highly visual spots around the city.

For instance, the advert featured on the right was placed on 900 billboards and 5,000 city lampposts across the city. It is a factual advert that gives details of the Citybike card, which is like a credit card scheme, whereby users sign up to a card and give their bank details. Money is then automatically taken from their bank when using the bicycles, although the first hour of use is free. The card also acts as a key and releases the bicycles from their stations. (Vienna, 2004).

This was complemented with a number of other adverts showing cartoon-type characters using the bicycles with the strapline '**Ganz Wien radelt gratis mit dem Citybike!'** which translates as **'The whole of Vienna rides a Citybike for free'** (see example below)**.** Another version of this poster was also produced with the strapline **'Rolling with Citybike.'** Although the use

of cartoon characters has a slightly humorous connotation, the advert is very direct and to the point and does not give any details about the scheme. However, as this is a poster, space is limited, moreover there is a reference to the Citybike website which does contain more information on how the scheme works (Vienna, 2004').

4.3   Issues for Discussion

As a result of reviewing the various types of marketing material produced by various mobility service schemes a number of issues arose that require further discussion, these are set out below.

4.3.1 Environmental Turn-Off?

As has been demonstrated earlier the majority of mobility service schemes were not necessarily set up with environmental motivations as their main rationale. However, by their very nature mobility services promote sustainable modes of transport therefore the majority of schemes are concerned with environmental issues on at least one level. This is reinforced with the majority, if not in fact all, of the schemes whose marketing was reviewed making some reference to the environmental benefits of their scheme – even if this was only a small reference on their website. However, perhaps even more interesting is the number of schemes questioned (including those that emerged as a result of environmental motivations) that highlighted the limitations of using environmental messages to sell their scheme.

The case study on South Gloucestershire's car pooling scheme (see Box 5.1) touched on the reluctance of pushing an environmental message in its advertising. Similarly the Teil Auto car share scheme, which was originally set up as a result of environmental motivations, uses the following slogan on their marketing material *'Nur fahren müssen Sie selbst'*, which translates as '***You just have to drive'***. This more service orientated slogan, which was supplied by a professional marketing agency, was only introduced after the initial setting-up phase. The coordinator of the scheme states that this reflects the evolution from a purely environmentally-driven idea of volunteers running a car share cooperative to a business-orientated and (more) economically driven organisation, which emphasises the convenience and time and cost savings associated with car sharing. According to the coordinator, whilst the scheme is still driven by environmental objectives, it was felt that the business could not support itself merely through 'eco-clients', who tended to only use the cars at the weekend. It was felt that the re-branding of the scheme and a move towards intensifying the marketing to specifically target the business community, through exploiting week-day use of cars was

necessary and that using an environmental message would limit the appeal to this audience. Accordingly, firms and local businesses will be targeted with a specially-produced flyer, which will most likely be designed by a professional marketing agency and will emphasise the cost and time savings and convenience of the scheme, with the environmental aspects playing a much smaller role than previously (Teil Auto, 2004).

The coordinator of the car share scheme AutoShare, Canada, had considered using an environmental message to promote the scheme, as whilst the scheme was primarily a profit making scheme it was also very much motivated by environmental concerns. However, as he was keen to promote AutoShare as a professional service and 'serious business venture', he was wary that using a green and community group type image would limit their potential for growth. As a result, he intentionally decided against promoting an overtly environmental message. As has been demonstrated, AutoShare did however, as with other schemes, make some reference to the environmental benefits (AutoShare, 2004).

Similarly, Hampshire County Council's car pooling scheme was conscious not to focus on the environmental aspects of the scheme too heavily. In particular, as the scheme was targeted at businesses and their employees, they had found in the past that an overly 'green' message had put businesses off (Hampshire, 2004).

4.3.2 Positive Images and Change of Marketing Over Time

The INPHORMM project mentioned earlier suggested that marketing should steer away from negative anti-car sentiments, and focus on the positive aspects of reducing car use such as the health benefits from walking and cycling (INPHORMM, 1998). From reviewing available marketing material of various mobility service schemes it is possible to identify a number of issues in relation to this. On the whole the majority of marketing tends to focus on the positive benefits of using mobility service schemes. For instance by pushing the convenience of the schemes or by highlighting the cost savings that can be had.

However, a number of schemes do touch slightly on the problems associated with car use by pointing out problems such as congestion and pollution that occur as a result. This is particularly the case for car pooling schemes whose main target audience are commuters. Indeed, such schemes tend to personalise the issue of congestion by explaining the negative effects of congestion on the individual, such as how it can cause delay and stress, and thus car pooling schemes are sold on how users can help contribute to solving the problem of congestion. Nevertheless, even in these cases the messages implied are not unduly anti-car, rather discuss positive solutions to a problem which exists. In relation to the INPHORMM model's reference to focusing on the positive aspects of walking and cycling, clearly this tends only to be apparent in the bicycle pooling schemes. Nonetheless, it is apparent that

whilst mobility service schemes do not feature the health benefits of walking and cycling in their marketing, an actual increase in the use of such modes often occurs as a by-product of users joining of mobility service such as car pool and car share schemes (eg, see Meijkamp, 2000).

The INPHORMM model also notes that to be successful marketing would need to be repeated over time to allow new audiences to be reached. From discussions with a number of schemes it became apparent that they did not consider marketing as a static issue. For instance, as schemes have matured many have changed their marketing in a number of ways, including actual redesigning of logos and increasing the amounts of material produced. For example the case study of Zipcar (see Box 5.2) shows a change in the images used on marketing materials. TeilAuto, Germany initially used a marketing agency, which supplied slogans, catch words etc. These in turn were used on posters and flyers and provided the basis for subsequent in-house work. However as the scheme has flourished there are plans to increase the level of marketing with plans to re-employ a marketing agency to support an intensified campaign (TeilAuto, 2004).

Indeed other schemes also noted how they felt that they needed to increase the amount of advertising that they carried out. For instance, the coordinator of the Auto Teil, Germany car share scheme felt that more advertising was needed to help increase the number of users of the scheme, as this had been dropping recently (AutoTeil, 2004). CityWheels, UK commented on how they were looking at designing new leaflets (CityWheels, 2004), and the coordinator of the Hampshire car pooling scheme pointed out that:

> 'At present there is not really a proper marketing strategy as it's all a bit ad hoc. In the future there are plans to step up marketing of this scheme and other non-car mode related schemes. It is likely that the message will stay the same however there will be attempts at getting the message more visual, for instance, their use of car park banners for businesses to be able to display in the car parks on a rotational basis' (Hampshire, 2004).

Other schemes noted that they reviewed their marketing strategy on a regular basis, for instance South Gloucestershire's car pool scheme stated that they would do this at least yearly, although this would not necessarily result in a change of actual marketing (South Gloucester, 2004).

4.3.3 Factual or Humorous Positive Messages

From reviewing the marketing material available, it is clear that the large majority opt for a factual presentation, particularly for leaflets and websites. Indeed, some of the earlier mobility service schemes such as Mobility, Switzerland and a number of co-operative car share and bicycle pool schemes

in Europe, tended to go for very basic production of leaflets and posters which were low on visuals but high on factual content.

In comparison with more recent schemes there was also less use of media such as radio, bus backs and the internet, as these were less commonly used for marketing purposes in general at that time. The issue of budget can also be seen to play a role in the presentation of marketing for earlier schemes. For instance a number of schemes, particularly not-for-profit ones (which the earliest schemes tended to be) had limited budgets for marketing for a variety of reasons. Accordingly, this led to the production of very basic marketing, designed by the schemes themselves (as opposed to a professional marketing company) without the use of logos or straplines, for instance community bicycle scheme Yellow Bike Action (Yellow Bike Action, 2004), and a number of German car share schemes such as Farhgut Hegau-Bodensee e. V and Stadt Teil Auto (Farhgut, 2004; Stadt Teil Auto, 2004).

More recently a number of mobility service schemes have continued to make use of a factual approach to their marketing. Increasingly professional marketing companies have been employed, hence resulting in a more polished finish to the marketing material. Interestingly however, the actual content of such marketing and the messages contained within them are similar to those employed by the earlier schemes. Hampshire County Council decided on a factual message when promoting their car pool scheme, as it has found that people often ask a lot of questions about how it works and have preconceptions of various barriers to car pooling. To counter these barriers the leaflet explains all the pros and cons. They also point out that this decision was influenced by their target audience. For instance, as the scheme was being promoted to businesses it was thought a humorous message would be inappropriate and also as a council they often get complaints if they produce something that is humorous (Hampshire, 2004).

Nonetheless, whilst the majority of schemes continue to produce marketing materials that are factual in their content, increasingly schemes are adopting the use of humorous or clever messages, although often these are mixed with factual information giving details of how the scheme works. Of the types of media where a humorous message may be attempted posters lend themselves particularly well to short snappy messages, due to space constraints (although there are exceptions to this of course).

4.4   Summary

It is clear from the findings of this section that mobility service schemes approach marketing in a variety of different ways. As Section 4.1 outlined there are numerous forms of media available to mobility services to market their schemes. Clearly, some forms are more widely used than others, such as leaflets, websites and posters, and in many ways this is linked to the amount of budget available to schemes. Moreover, as mobility services are still a relatively unknown phenomenon, media such as leaflets and websites are

ideal as they allow detailed information on issues such as how the scheme works, what it costs and how to join. It is also apparent however, that, more recently, schemes have been experimenting with other types of advertising such as radio adverts and making use of space on public transport such as bus backs. Television adverts, although employed by one scheme, Commuter Connections, US are at present too expensive an option for the majority of schemes, although as some of the commercial schemes grow in size and stature this may well become an option for them. It has been demonstrated however, that even for those schemes with limited marketing budgets, there are numerous opportunities for schemes to get free advertisements. For instance it has been shown that local newspapers, radio stations and even television often run stories on local mobility service schemes, which allow them to reach a wider audience than might have been possible with paid forms of advertising.

In relation to the messages contained within the various forms of marketing a number of points have been highlighted. In the majority of cases five main themes are featured in mobility service marketing: environmental benefits; easing congestion; cost savings; time savings; and convenience. On the whole the majority of these were included in most campaigns. However some schemes did proceed with using one primary message in their marketing. The purpose of looking at motivations of schemes in Chapter 2 was intended to see if there was any correlation in the types of messages used in their marketing. It was apparent that those schemes that were set up with environmental motivations did then tend to use an environmental message in their marketing, although with a few exceptions. Similarly a number of car pool schemes which were set up to help alleviate congestion caused by commuters travelling to work in peak-time also used a congestion-related message in their marketing. However, whilst congestion was used as the primary message in a number of cases, this was not as obvious as those schemes which emerged for environmental reasons. Rather car pool schemes tended to feature all the messages outlined above equally in their marketing. Indeed it was clear that such schemes were keen to promote the cost and time saving aspects of their scheme alongside the convenience angle, particularly when aimed at local businesses.

For the remainder of schemes it was apparent that a mixture of messages was employed in their marketing strategies. Of particular interest was the conscious decision of some schemes to steer clear of an overtly environmental message, for fear of putting off prospective clients. In many ways this makes sense, as previous work on mobility service schemes demonstrates that the early adopters of such schemes tend to be those with environmental interests anyway, therefore they are likely to join up regardless of whether a full-scale marketing campaign has been employed. Accordingly, it makes sense to target marketing towards users who would not necessarily join because of any environmental interests they may have, and in this way promoting cost and time savings and the convenience of the scheme seems to be the best thing to do.

It would also seem that mobility service schemes take the issue of marketing as an important part of their business strategy and are keen to update this on a regular basis in order to keep attracting a new client base. This can range from measures that intensify the level of marketing to actual re-branding of logos and straplines.

5

Conclusions

The context of this project is the ongoing discussion about the potential role of mobility services, such as car sharing, car pooling and bicycle pooling, in a future sustainable transport system. Research in the first year of the two-year project identified that manufacturers and transport users both have key roles to play if mobility services are going to be widely taken up (Skinner *et al*, 2004). The motivations behind industry's participation in car sharing were explored in a parallel research project that is reported upon elsewhere (Herodes and Skinner, 2005). The aim of the research underlying this report was to explore how mobility service schemes went about attracting potential users, i.e. how they marketed their respective schemes. The objective of the research was, therefore, to explore the way in which mobility schemes are marketed and the extent to which this reflects the origins of the scheme and the intended target audience.

As noted above, the three different types of mobility services being examined in this report are often considered likely to play an increased role in a future urban sustainable transport system. In spite of this, Chapter 2 demonstrated that environmental considerations are not always the single most important factor underlying the emergence of the scheme. Schemes are also set up for other reasons that could be argued to contribute to a sustainable transport system, eg improving accessibility and easing congestion, as well as sometimes even to make a profit. Furthermore, the motivation behind the setting up of a scheme varies notably between the three different mobility services researched. Relieving congestion was often a major motivation behind the creation of car pooling schemes, which links directly to the fact that the target audience for such schemes, as identified in Chapter 3, tends to be commuters. Improving accessibility is a more common motivation behind the setting up of bicycle pooling schemes, and these often tend to target public transport users and tourists. Of the three services, car sharing schemes have been set up for the broadest range of reasons, and similarly the scheme's target audience tends to vary including, for example, people in a particular geographical locations or from a particular social group.

Chapter 3 also identified whether, and how, schemes identified their target audience. Most, although by no means all, schemes did attempt to identify their target audience. When identifying a target audience, the majority of schemes used similar methods, such as researching existing schemes (either through personal contact or examining literature and websites), while a smaller number commissioned their own market research.

Chapter 4 highlighted that, whilst all schemes undertook marketing, the extent to which different types of media were used differed considerably, with some proving more popular than others. The popularity of certain forms of media depends on a number of factors, particularly cost and the amount of information a medium can contain. Leaflets and websites were clear favourites, with the majority of, if not all, schemes employing these two types of media to inform users of their existence. Both can contain detailed information about the scheme, and are relatively cheap. Posters, while cheap, are not able to display as much information as a leaflet or website, but, if displayed in an appropriate location, have the potential to be seen by a large number of people. Due to the limited budget of most mobility service providers, free advertising in local media and attending events are particularly good ways of obtaining publicity. Few schemes have, to date, made use of television, while some paid for radio advertising.

Chapter 4 also examined the different types of messages that were used within the marketing, the way in which these were presented and whether this was linked to the original rationale for setting up the scheme. The majority of schemes that emerged in response to environmental concerns and congestion did tend to present, respectively, a primarily environmental- or congestion-related message. In comparison, other schemes tended to opt for a mixture of messages in their marketing strategies. Of particular note was the conscious decision of some schemes to avoid using an 'environmental' or 'green' message, as it was felt that this might alienate potential clients, who are not inclined to environmental issues. In addition, the messages used were always positive stressing the advantages of using the service, and were increasingly humorous.

In the context of the potential role of mobility services in a future sustainable transport system, a point worth noting is that schemes are not only set up for environmental, or other sustainability-related issues (ie increasing accessibility), as they are sometimes set up as profit-making ventures. Furthermore, whilst most schemes do mention the potentially positive environmental impact of using their scheme, many do not stress this potential benefit for fear of alienating potential clients. Finally, the message used in the marketing should be positive and appeal directly to the benefits that an individual using the scheme might experience, rather than alluding to broader, less tangible advantages.

Annex I – Contributors

Correspondence was undertaken with the following organisations in the course of the research that underlies this report:

Bicycle Pool Schemes:

Bycklen, Denmark (2004)
Ov Fiets, Netherlands (2004)
Palmerston North Bicycle Scheme, New Zealand (2004)
Sandnes, Norway (2004)
Vienna CityBike, Austria (2004)
Yellow Bike Action, Canada (2004)

Car Pool Schemes:

Commuter Connections, US (2004)
Datessa, Sweden (2005)
Hampshire County Council, UK (2004)
Intelligent Samåkning, Sweden (2004)
South Gloucestershire Council, UK (2004)
Warrington Borough Council, UK (2004)
Borough of Poole (carsharedorset), UK (2004)

Car Share Schemes:

AutoShare, Canada (2004)
Auto Teil, (Minden) Germany (2004)
Bristol City Car Share, UK (2004)
Car Sharing Portland, US (former coordinator Dave Brook (2005)
City Car Club, Finland (2005)
CityWheels, UK (2004)
Fahrgut Carsharing hegau-bodensee, Germany (2004)
Flexcar, US (2005)
Flo Car Share, Australia (2005)
Grunes Auto Gottingen, Germany (2004)
Hour Car, UK (2004 and 2005)
Lewes CarShare, UK (2004)
Mobility, Switzerland, (2004)
Muovo, Italy (2004)
Shell Drive, Germany (2004)
Smart Moves, UK (2004)
Sunfleet, Sweden (2005)
Teil Auto, Germany (2004)
Vrtucar, Canada (2004)
Whizzgo, UK (2004)
Zipcar, US (2005)

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