

# Demand for Sharing Economy Mobility Services (Marketing's contribution)

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The Ehrenberg-Bass Institute is the **world's largest** centre for research into marketing.



# (some) Research Questions



1. What is the penetration and usage frequency of shared mobility transport options, compared to other more traditional transport options? Do these 'disruptor' brands follow known brand usage patterns?
2. Do sharing economy mobility services share customers in the expected way between them? Do they form a transport market partition or are they just "normal" small brands?
3. What is the best path for growth for these future mobility options? What behavioural targets need to be prioritised and what communication messages will aid adoption?

# Data



2017 data from 2004 USA respondents across five cities

New York, LA, Chicago, Houston and Philadelphia

Free and paid, expensive and cheap, new and legacy brands

Accommodation and music also covered

Adelaide and Brisbane in 2018 across 600 respondents

# A Quick Overview



60+ years of research  
into understanding  
**How Brands Grow**



Has given us the  
**Laws of Growth**

# The Law of **Double Jeopardy**



means  
that...

**Loyalty is *predictable*  
and *varies little*  
between brands.**

**Always slightly higher  
for larger brands**

**Penetration ~~NOT~~  
loyalty is the route to  
growth**

# Double Jeopardy USA

	Penetration	Occasions pw
Own car	46	6.4
Subway	45	5.3
Bus	29	4.6
<i>Uber</i>	28	4.0
Taxi	28	3.4
Friend/family car	13	3.4
Bicycle	12	4.8
<i>Lyft</i>	10	4.4
Motorbike	7	5.1
Chauffeured car	6	4.6
<i>Juno</i>	5	4.8
<i>Via</i>	5	4.3
<i>Gett</i>	4	5.3
<i>Bandwagon</i>	4	5.0
Moped/.scooter	4	5.4
<b>Average</b>	<b>16</b>	<b>4.7</b>
<b>Ratio (H:L)</b>	<b>11.5</b>	<b>1.6</b>

# Double Jeopardy Australia

<b>Brisbane</b>	<b>Pen. Weekly</b>	<b>Avg. Occasions</b>
Your own car	35	6.1
Train	10	3.1
Bus	9	3.0
Friend's car	7	3.6
<i>Uber</i>	6	1.9
Taxi	3	1.8
Bicycle	1	5.6
Motorbike	1	6.3
Bike	<1	2.0
Tram	<1	2.5
<b>Average</b>	<b>7.3</b>	<b>3.6</b>
<b>Ratio</b>	<b>35</b>	<b>3.1</b>

<b>Adelaide</b>	<b>Pen. Weekly</b>	<b>Avg. Occasions</b>
Your own car	72	5.8
Friend's car	18	2.6
Bus	17	4.1
Tram	9	3.2
Train	10	3.1
<i>Uber</i>	7	2.0
Taxi	3	2.2
O'Bhan	6	3.1
Bicycle	4	3.3
<i>Share bike</i>	1	2.0
Motorbike	1	4.0
Chauffered car	<1	1.0
<b>Average</b>	<b>11.4</b>	<b>2.8</b>
<b>Ratio</b>	<b>72</b>	<b>5.8</b>



# The Law of **Buying Frequency**



**All brands have few heavy- but *lots of light-buyers***

**100% loyals are very few and contribute *very little* to total sales**

**means that...**

**Reaching light buyers is essential for growth —NOT optional**

# Sole Users Brisbane



	<b>Sole Users (month)</b>
Own car	41
Train	5
Bus	2
Friend/family car	2
Uber	0
Taxi	1
Bicycle	1
Motorbike	1
Bike share	1

<b>Transport</b>	<b>Sole Loyals (week)</b>	<b>Other loyals</b>
Car	7.3	17.5
Uber	5	14.9

# The Law of **Brand User Profiles**



means  
that...

**Brands' customer profiles seldom differ**

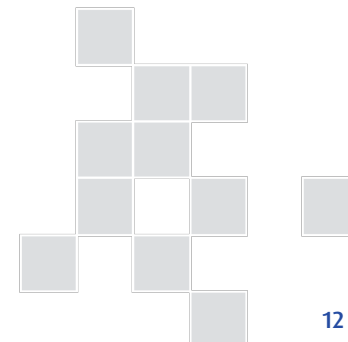
**A brand sells to much the same people as all its other rival brands.**

**A brand's growth potential is unrestrained.**

**Any brand's customers could be yours.**

# Brand User Profiles Mean Average Deviations

	Transport
Gender	6
Age	8
Income	4
Employment status	3
Technology gives me more control over my daily life	4
Technology help me make necessary changes in my life	4
Technology allows me to more easily do the things I want to do at times when I want to do them.	2
New technologies make my life easier	3
I can figure out new high-tech products and services without help from others	4
I seem to have fewer problems than other people in making technology work	3
Other people come to me for advice on new technologies	5
I enjoy figuring out how to use new technologies	4
Technology controls my life more than I control technology	5
I feel like I am overly dependent on technology	7
The more I use technology, the more I become a slave to it	5
I must be careful when using technologies because criminals may use the technology to target me	4
New technology makes it too easy for companies and other people to invade my privacy	3
I think high-tech companies convince us that we need things that we don't really need	4
<b>Average</b>	<b>4</b>



# Implications for shared mobility brands



- ✓ Shared mobility brands are “normal” brands, they are just small because they are new
- ✓ The “Laws of Growth” also apply to these disruptor brands
- ✓ ***Continuously reach all category buyers*** (through communication and distribution) — don’t be silent
- ✓ ***Stay competitive*** always keep the brand easy to buy in the full range of situations and contexts; remove any barriers and reasons to not buy
- ✓ ***Build mental and physical availability*** at every chance

# Questions ?

