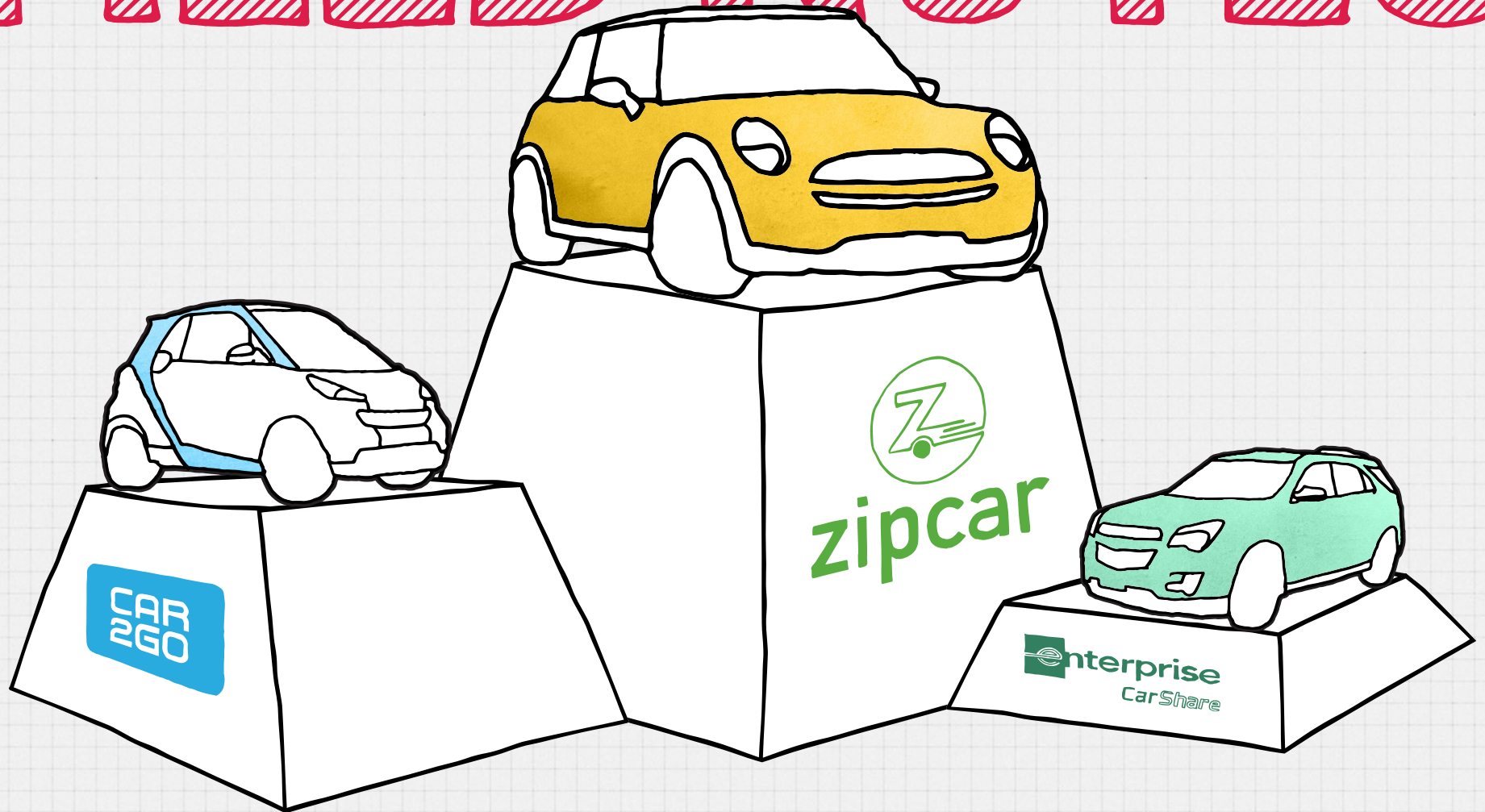


MBLM

FIELD NOTES



CAR-SHARING BRANDS HEAD-TO-HEAD

HITTING THE ROAD WITH CAR-SHARING BRANDS

In the age of the sharing economy, urbanization, and environmental responsibility, car-sharing programs are increasing in global popularity as a collaborative means of mobility.

As road warriors and commuters living in New York, with a fascination for tech-driven brand relationships, we wanted to get a firsthand look at how major car-sharing brands are connecting with consumers. So we took them for a test drive.

HOW WILL THEY STACK UP?



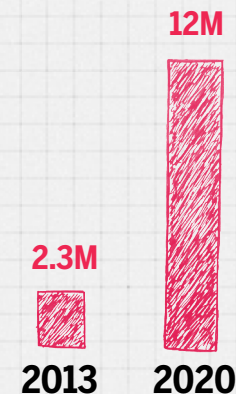
VS



VS



FAST FACTS



- Global car-sharing membership is expected to grow from 2.3 million in 2013 to 12 million by 2020.

Source: Navigant Research



- For every Zipcar, there are 15 fewer owned cars on the road.

Source: Zipcar

THE TEST DRIVE

WHAT WE DID

We decided to take a road trip to Ikea
(well, we also needed new plants for the office).

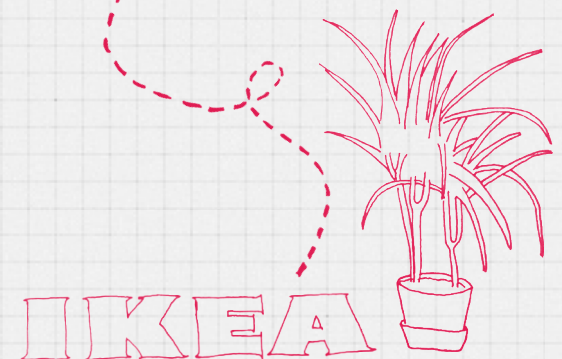
From sign-up to drop-off, our objective was to determine which brand relationship we'd want to continue after our first-ever car-sharing experience.



METHODOLOGY

1. Sign up with car2go, Zipcar and Enterprise CarShare
2. Assess the brand promise of each competitor
3. Hit the road to review the product experience
4. Pick up plants from Ikea
5. Compare competitors to see who wins our love
6. Remember to water plants

START



REVIEWS FROM THE ROAD

CAR2GO

BRAND PROMISE

At the heart of car2go's brand is the promise of "spontaneity on wheels." As the name implies, car2go offers a quick and practical answer to life's errands and appointments. Member testimonials reinforce this message in advertising and Web copy, conveying a "perfect fit" for everyday situations.

The key differentiator is the ability to pick up and drop off vehicles just about anywhere street parking permits in the "home area"—car2go's designated urban boundaries. Servicing the Brooklyn area is a fleet of 400 tiny Smart Fortwo vehicles, all branded in blue and white.



PRODUCT EXPERIENCE

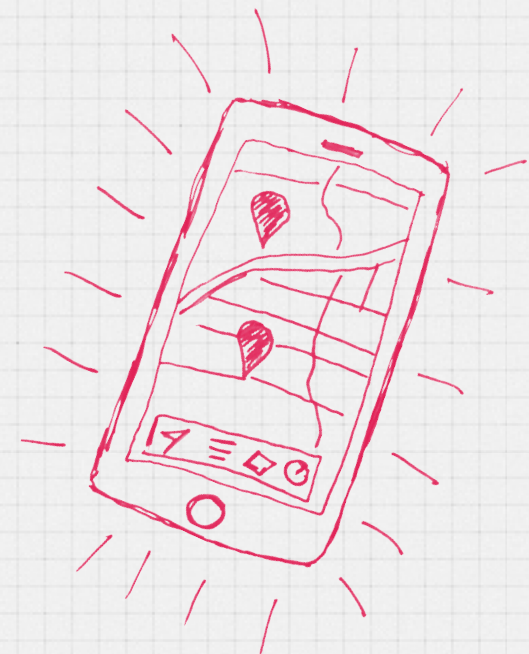
One of the first things we noticed is that car2go's app embodies expediency, immediately opening on the map to find or reserve a car nearby. Within the Brooklyn home area, we were pleasantly surprised to find a number of available vehicles just a few blocks away. This was easy!

Accessing the car was also no hassle. After a magic wave of the membership card, we hopped in and were greeted by a voice—a personalized welcome from the satellite navigation. The system provided a basic road map, environmental info, an emergency contact, and general instructions for using the vehicle. We'd describe it as friendly, no-frills technology.

The driving experience was what you'd expect from a car of this size, but that's kind of the point. Expectations are set and met. The novelty and character of a small car only added to what had been, so far, a charming brand experience.

When our journey came to an end is when the trouble started. The "park anywhere" benefit is at the mercy of local parking rules. In Brooklyn, as in many city environments, this meant a long drive around many blocks, peering at confusing signs. We ended up parking back where we started, which kind of defeated the purpose.

What started as a fun experience turned into a frustrating dose of reality—an ironic reminder of why we don't own a car in the first place.



REVIEWS FROM THE ROAD

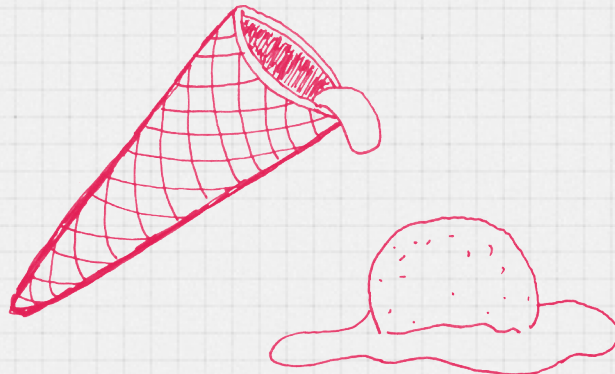
ENTERPRISE CARSHARE



BRAND PROMISE

In name and expression, Enterprise CarShare plays to the brand equity of its parent, Enterprise Rent-A-Car—the leading car-rental agency in North America.

Promising "the new standard in car sharing," brand messages reinforce award-winning customer service, local convenience, and the largest, most diverse fleet in the market. In social channels, the brand tends to rely less on corporate proof points and more on emotion, inspiring audiences to take short trips that "fuel your passion."



PRODUCT EXPERIENCE

Not surprisingly, as an extension of Enterprise Rent-A-Car, making a booking on the app felt very familiar. Through a slightly clunky interface, it required the same details as a traditional online rental (start time, end time, start date, end date, etc).

Finding a wide range of vehicles on the app was a positive experience. From luxury to more economical options, we had fun choosing. Location did restrict some of our options—it depends how far you're willing to travel to pick it up. And if your vehicle is parked in a city garage, like ours was, you may have to wait for it to be shuffled out. Essentially, the pick-up process felt like a decentralized car rental with no paperwork, largely because it is.

The driving experience was smooth sailing. Our straightforward trip to Ikea and back reinforced how we were feeling about the brand. While touted as "the new standard in car sharing," our experience didn't feel terribly new or revolutionary. It felt more like "corporate car rental lite."

REVIEWS FROM THE ROAD

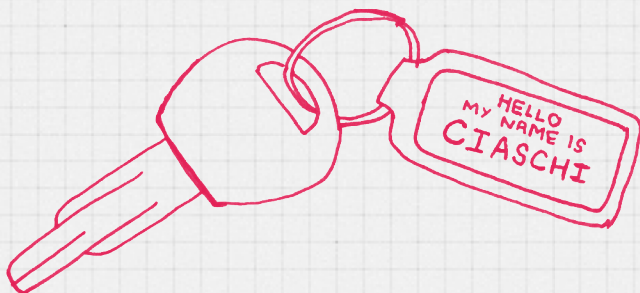
ZIPCAR



BRAND PROMISE

As an industry pioneer, Zipcar created the simple promise of “wheels when you want them” and helped define the category for consumers and competitors. Its brand story is built on a “revolutionary” mission to help the environment—by getting private cars off the road—while redefining mobility for all.

This social-movement mentality continues to be a driving force with communications that convey a sense of community, purpose, and freedom. The brand refers to its members as “Zipsters,” helping to reinforce the feeling of belonging to a tribe.



PRODUCT EXPERIENCE

We had a hard time signing up with Zipcar. Customer service has been a problem for the brand, and it showed. Our application got lost after a faulty transaction, and it took many calls to get to the bottom of it. Finally, we spoke to someone who was able to help.



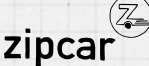
Once we'd picked up our membership card and activated it on the website, we were granted access to the app. This was a tough club to join! Fortunately, the intuitive design and features of the app calmed our frustrations. We chose the car we wanted from a wide selection located in a nearby garage and made a quick booking.

One of the fun things about Zipcar is that it names its cars. It's an effortless yet powerful differentiator. Not only did it make things easier for us (at the garage we simply asked for our car by name), it creates a relatable connection in general—people name cars. And this one is yours.

On the road we could feel our initial customer service concerns fading. “Ciaschi” was spacious, fun to drive, and warm; a mobile refuge against a New York winter. We zipped to Ikea, picked up a plant, and zipped back to the garage with no fuss. Walking away from the car, we noticed a sign that reinforced the lively spirit of the brand: “Zipcars live here.”

OVERALL ASSESSMENT

We rated the brand, product and overall experience as compelling, OK or “ugh”.

SCORECARD			
BRAND			
PROMISE	+	○	+
EXPRESSION	+	○	+
PRODUCT			
SERVICE	○	+	—
TECHNOLOGY	+	○	+
EXPERIENCE			
DELIGHT	+	—	+
UTILITY	—	+	+

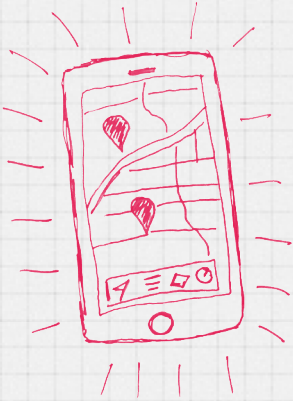
+ COMPELLING
○ OK
— “UGH”

Car2go and Zipcar had the most compelling brands, largely driven by a distinctive personality and clear promise. Both, however, suffered setbacks in areas of functionality and service—parking with car2go and sign-up with Zipcar.

Enterprise CarShare, on the other hand, delivered a consistent brand and product experience. Unfortunately, from an engagement perspective, the fun factor was missing.

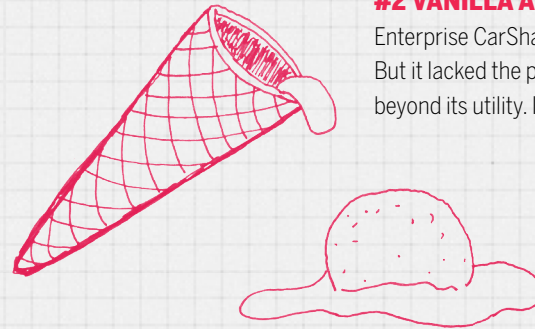
INSIGHTS

Five key takeaways from our time behind the wheel.



#1 THE APP IS THE EXPERIENCE

Car2go's app was sublime in its simplicity, opening immediately on a map to find cars nearby. This unfettered practicality embodied the essence of the brand and echoed its name.



#2 VANILLA AIN'T THRILLER

Enterprise CarShare had the most reliable brand experience. But it lacked the personality to spark a meaningful connection beyond its utility. It felt like just another rental.



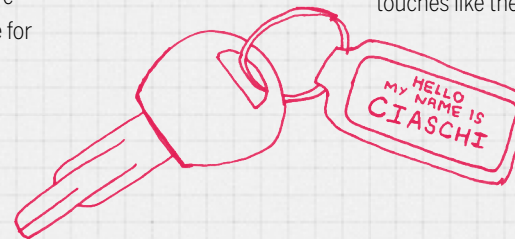
#3 KEEP SIGN-UP SMOOTH

Zipcar suffered from a poor start in the customer service department. Signing up was problematic for a brand that's been in the game a while, and that sent things in the wrong direction.



#4 MANAGE YOUR PAIN POINTS

A key benefit of car2go is the freedom to park almost anywhere when you're done—almost. Street parking can be a nightmare for city drivers, leaving a bad taste after a fun drive.



#5 LITTLE DIFFERENCES MATTER

From the names Zipcar gives its vehicles to car2go's personalized welcome from the satellite navigation system, we found that nice touches like these enriched the experience.

END OF THE ROAD

Despite a rocky start with customer service, we bonded most with Zipcar. A sense of community, strong brand personality, and a well-designed app created a positive connection that overcame initial barriers. Plus we scored some new plants to spruce up the office.

WINNER!



LAST WORD

As the market for car-sharing brands matures, it will be increasingly important for brands to differentiate beyond merely fulfilling the expectation of getting you from A to B. While frictionless, app-enabled transactions are a table-stake, compelling brand personalities and stories can help create more meaningful relationships.

ADDITIONAL READING

Navigant Research, "Carsharing Services Will Reach Nearly \$6.2 Billion in Revenue by 2020" <http://www.navigantresearch.com/newsroom/carsharing-services-will-reach-nearly-6-2-billion-in-revenue-by-2020>

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Zeng, Heshuang. TheCityFix, "On The Move: Car-Sharing Scales Up" <http://thecityfix.com/blog/on-the-move-car-sharing-scales-up-heshuang-zeng/>

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PEOPLE, BRANDS AND TECHNOLOGY.**

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