# Owning your customers: How digital brands are creating political pressure by mobilising their customers

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## ABSTRACT

Digital start-ups know their customers predicting sentiments, behaviour and aspirations better than Freud knew his patients. Sophisticated marketing machines respond to customer needs at an instant, influencing buying decisions but also engaging them in forwarding a brands' economic and political interests. Customers are nudged to form movements, calling for regulatory change and disruption by criticising the 'establishment'. Political decision makers and administrations face emerging "corporate" grassroots pressure to adapt legislation and processes. These capabilities and methods vastly differ from how traditional public transportation providers interact with passengers. Public transport providers are far from owning the relationships with their customers, with consequences for product and service development, as well as missed opportunities for creating a greater bond between customer and brand. The paper touches only briefly upon the opportunities of using customer data for public transport. Rather the focus will be on how new mobility providers use their influence on customers to influence public policy. Drawing on German and International examples, the paper discusses how some Governments and City Authorities are responding. In the light of these questions it is vital for the public sector, specifically public transport, to understand risks, opportunities, and the impact these new customer relationships can have.

## 1. Introduction

The transport market, in particular urban mobility, is undergoing significant change since digitalisation has been gathering speed. New and adapted ideas of shared mobility, first/last mile solutions and online ticketing options fuelled by technical evolution, the rise of mobile, real time data, and platform economies have led to emerging business models and customer requirements which increasingly challenge how public transport is traditionally run in Western economies.

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One area that is transforming vastly but is not always on the radar of transport researchers, planners and practitioners is the methods and tools applied by start-ups to establish good customer relationships and utilising these not only to further their market position but also their regulatory environment. A brief overview is given into some core principles, recent developments and trends affecting marketing and brand-consumer relationships. The paper focusses on how maintaining good customer relationships enables companies to get their customers involved in calling for regulatory change and creating consensus against the 'establishment' they are aiming to disrupt. Companies from the transport sector as well as other industries are mobilising their customers rather than, or in addition to, pursuing traditional lobbying methods to push for favourable conditions or amendments of limiting regulation. In our case studies we show how two companies went about mobilising their customers to further their vested interests. The case studies comprise of the companies' business proposition, the opposition or regulatory challenges they face, tactics deployed to fight against these and how effective they were in achieving change.

Understanding strategies, practices and success factors we move on to discuss the findings. What risks and opportunities do these methods pose and what can public transport operators (PTO) learn from the new entrants to the mobility market in terms of brand customer relationships? And finally what are the implications and potential consequences of these findings for planning and running of public transport?

## 2. Relevant developments, trends and experiences

### 2.1 Revolutionising customer experiences through digital

The reality new mobility providers understand is that technology offers the possibility to establish deeper, direct, and more personal experiences between customer and brands than ever before. In 2017 the most powerful brands no longer have 'consumers' -- they have supporters, even fans.

It's widely known established broadcast marketing, communications and advertising techniques and channels are increasingly ineffective. Today printing leaflets, posters and magazines - and, yes, even tweeting - is no longer enough to establish meaningful brand affinity, especially amongst millennials and younger consumers (Crowdtwist, 2015).

To win grassroots public affairs and political campaigns brand affinity is arguably now the central driver to motivating people to take social and political action, over and above brand loyalty. With brand loyalty, there is often little personal connection tying the consumer to the brand (DeGabrielle, 2010). The consumer is loyal to the brand because they perceive the brand to provide them with value; loyalty is often defined on rational terms alone, such as price points or behavioural factors. Consumers can be loyal but not interested in listening to the brands point of view on public affairs.

In contrast brand affinity is the emotional connection the consumer has to the brand. Social psychology says that a combination of warmth and competence are the main way we assess other people, and similarly so with brands (Cuddy et al., 2008). In asking people to support a brand 'beyond the point of sale' it needs to communicate with them in both dimensions. In grassroots political and public affairs campaigns people are typically asked to lend their time, donate money or vote - not dispassionately buy something - and they will never do this purely on rational grounds alone, and certainly never without first establishing strong affinity with a person or brand or cause over a period of time.

Digital is no silver bullet or replacement for poor products or poor marketing. But it does offer a revolutionary means to amplify the cultural and emotional dimensions of a brand to potential supporters, and then mobilise that support at a speed and scale like never before for public campaigns. This requires strategy, tactics and *long term* investment. In modern digital campaigning there are many aspects to consider but here are some core trends, techniques and practices:

**2.1.1 Establishing a Single Customer View**

Having a single customer view (SCV) is establishing as complete a picture of who one's customers are with an aggregated, consistent and holistic representation of the data known about customers that can be viewed in one place. Without first having this central data platform in place the information required to build brand affinity is less usable. Applying modern digital marketing techniques, nor organising any effective grassroots public campaigns are harder to achieve. According to some studies only 20% of organisations today actually have an actionable SVC in place (Davis, 2016):
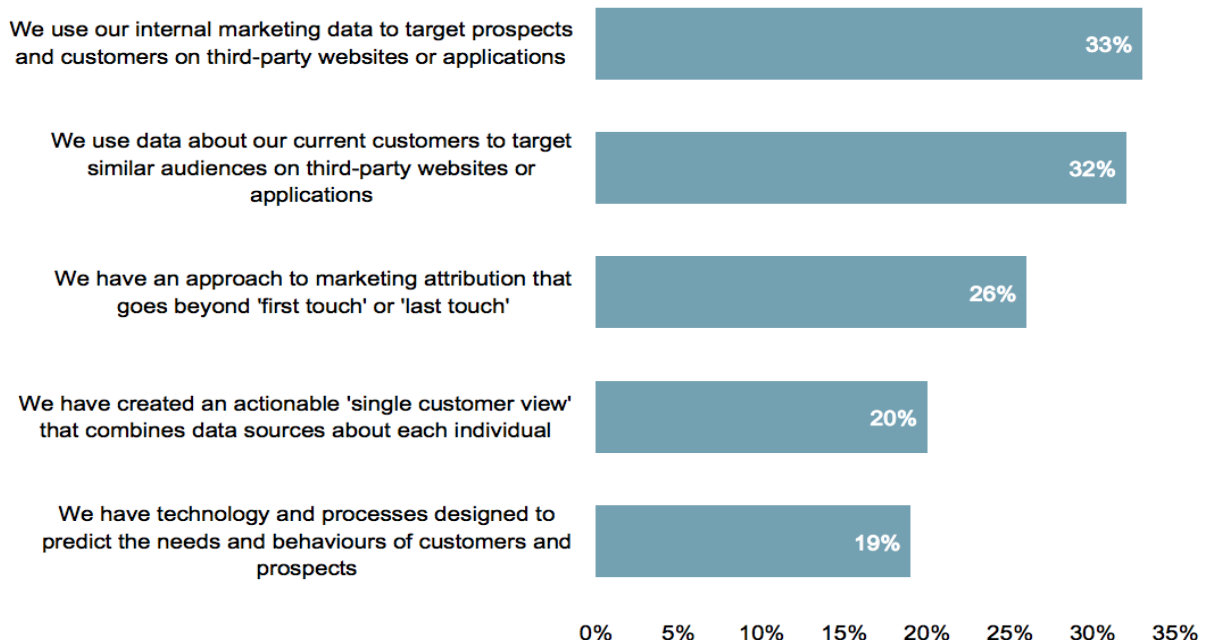


**Figure 1. Data and technology usage for marketing. (Davis, 2016)**

### 2.1.2 Snowflake Organising Models

Database providers such as NGP VAN, NationBuilder, Action Network and other commercial and non-profit CRM providers allow for the creation and management of a 'snowflake organising' structure. It is one of the key strategies that propelled Barack Obama into the White House in 2008 and how modern digital campaigns distribute leadership amongst their supporters and scale up their advocacy efforts (Stuart, 2014).



**Figure 2. Example of a Snowflake Organising model. (Stuart, 2014)**

### 2.1.3 Micro-targeting and Psychographic Models

Micro-targeting allows messages to be targeted to individuals based on quantitative research around specific parameters, such as specially designed surveys, and then uses statistical techniques to predict what will resonate best with audience segments based on their likely psychographic profile scores (Agan, 2007). Targeting people with similar personality, values, opinions, attitudes, interests, and lifestyles to an existing customer base is what these methods enable, though there are many more sophisticated applications. Psychographic

models and micro-targeting are being applied in commercial as well as political contexts and have been used by both presidential candidates in the 2016 U.S. elections.

**2.1.4 Machine Learning and Predictive Analysis**

Machine learning allows large amounts of structured and unstructured data to be made actionable by targeting consumers better and delivering more personal and therefore more valuable customer experiences. Functions such as predictive lead scoring and recommended case classification become possible, allowing brand to predict consumer preferences. Predictive Lead Scoring creates a value on a scale similar to a credit score, for example likelihood to make or be interested in a political issue based on past behaviour or obtainable metadata. Case classification models attempt to draw conclusions from observed values. Given one or more inputs a classification model will try to predict the value of one or more outcomes often in a decision tree structure.
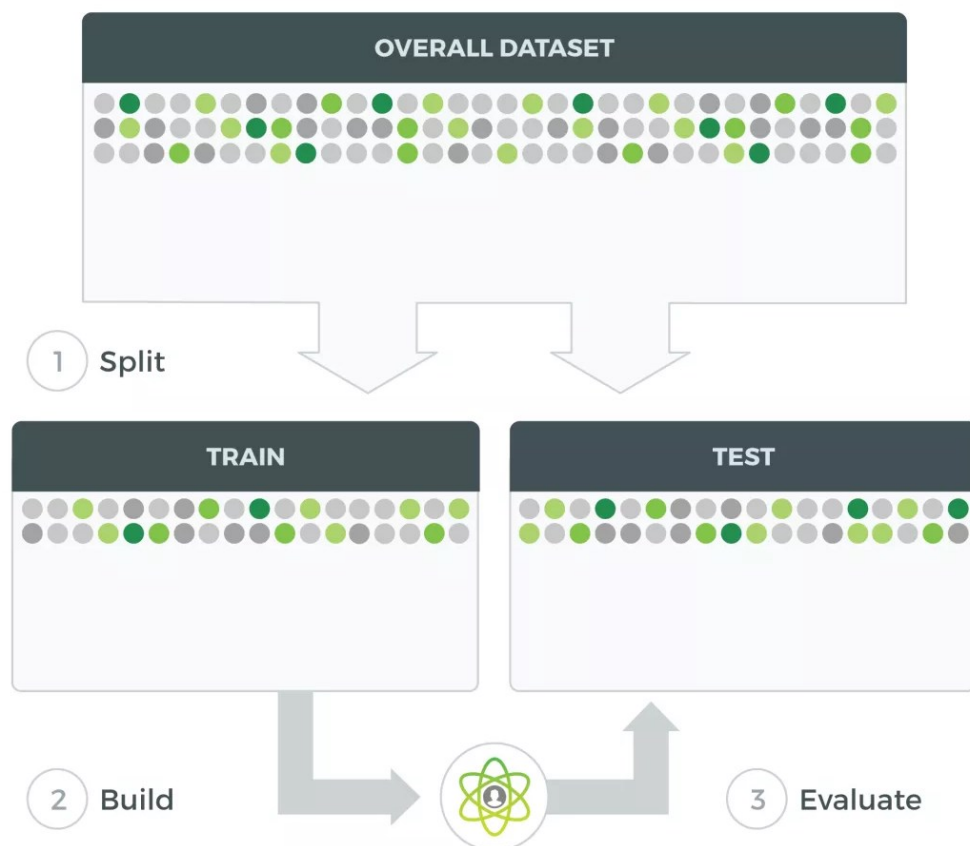


**Figure 3. Very basic workflow of training machine learning algorithms. (Infer Inc., 2017)**

**2.2     Status quo: customer relationships in Public Transport**

Public Transport (PT) delivers an important social good in allowing people to travel without

the need to drive or own a vehicle. Furthermore it keeps cities functioning with its vehicles and trains providing the capacity to move large amounts of people more efficiently than if they all travelled in private vehicles. Public transport is in most cases subsidized by the state because it serves important societal needs. This important income stream shouldn't however, lead to forgetting the one key factor in the equation i.e. the actual individual user.

One indicator for the intensity of the relationship between PTO's[1] and customers as well as more broadly the quality of provision and services is the amount of repeat business, i.e. monthly or annual tickets subscribers. Although these customers are committed public transport users and might even feel some affiliation with their local public transport brand, many PTO still don't know who even their most regular customers are. This is because many cities and public transport systems do not require, or may not be permitted, to collect any personal data from customers purchasing a monthly not to mention day or single trip tickets. Without this data many modern customer relationship management options are unobtainable, and other, subsequently often more expensive or less targeted approaches are being applied to collect the data required for the bare minimum, for example allocation of revenue across different providers.

The lack of data meets partly a lack of capabilities and resources for processing and utilising customer data, and partly a lack of understanding or will amongst PTO's to engage with their customers. Even though attitudes towards public transport users seem to have evolved from formerly treating them as public service beneficiaries and captive audiences, now more PTO's are placing value on their customers who have made a choice to use public transport. This has not however, led to a gravitational shift in the relationship between provider and passenger. PT is still provided and experienced as a utility, rather than a consumer product. This is despite changes in language and more emphasis on quality. Previously prevalent uses of terms like the German "Beförderungsfall" ("transportation case") for public transport customers are mostly a thing of the past. Passenger views are regularly consulted when assessing the quality of a local public transport provider. Despite the often occurring gaps in execution, frequent and fast communication is recognised as key in serving customers especially when problems occur.

Real time information as well as ticket purchasing options are increasingly accessible and offered en route at stations and on buses and trains. Online and mobile apps are in place and improving journeys and customer experiences by providing up to date information and support. Some companies are offering a no quibble money return guarantee to unhappy customers; others pay for a taxi home should something go wrong. Some providers are striving towards an alignment with retail standards. So despite continuous improvement in the running of public transport and information provided to passengers, little change has

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[1] With PTO we refer to the entity that is the (contractual/factual) partner of the user and who is owning/managing the brand of local public transport in this article, well aware that this is a functional definition and may not reflect the actual contractual set up in many cities. PTO in this sense may either be a commercial operator company or the local public transport executive organization.

really occurred in the overall nature of provider-customer relationships.

Most PTO's nor public transport authorities (PTA) do not have sufficient access to data and are mostly in the dark about who their users are, where their interests lie and how they could engage with them in a more meaningful way.

Identification with, loyalty and outright support for public transport are harder to develop and utilise if the opportunities that digital tools offer, are missed. While the different regulatory, political and funding environments may make it harder for PTO's to respond in an agile way to change or introduce measures fast, a slow alignment to constantly developing retail standards means tailing constantly behind. We argue that without a significant improvement in the relationship and connection between PTO and their customers vital opportunities are wasted. This is in stark contrast to the relationships new mobility providers forge with their customers, enabled by technology and advanced marketing methods which we will outline in the following section.

## 2.3    New mobility providers and their approach to customer relationships

New mobility providers, just like many other start-ups, base their business model, operational approaches and communications firmly on agile principles underpinned by data and digital technology. They may not deploy all of the methods described above, but they will all strive to establish a strong brand identity and close affiliation of customers with their brand. They achieve this by focusing on user experience.

While many traditional public transport operating companies mainly focus on functioning operations and keeping the transport system running, customer experience is often receiving little attention. The emphasis is often not on growth and winning new customers, at least specific efforts to increase PT market share are not particularly wide spread.

Contrasting to that, new mobility start-ups place user experience at the core of their business endeavour. With a new business idea, before even developing a finished product and investing in marketing, customer feedback is sought from the very start to develop the product. Only once a minimum viable product is developed and has successfully passed repeated trials and tests by customers, the next steps of entering the market are undertaken. This is when market research on potential target groups happens and insights on how these can be reached are gained.

A growing customer base is key to gathering feedback and improving the product, as well as persuading potential investors to buy into the business model. Often a fast growing customer base is linked to long lasting success of a product and brand. Therefore the mobility start-ups' initial focus would be creating a good experience for the customers. Both user and company benefit from an improved product and a more personalised service offering. For example the journey planning app CityMapper, while trialling an on demand shuttle service in

London, have had their drivers greet passengers by their first name when entering the vehicle (Garnett, 2017) thereby acknowledging customers as individuals. The economic reasons for doing so are relatively obvious: the stronger the connection to the brand, the more likely the consumer will rate the product, tell their friends, tolerate small service disruptions and continue using the service.

Understanding one's customers and obtaining and storing usage data furthermore allows for additional revenue streams to be explored, adding further benefit to the approach. Berlin and Porto Allegre based company door2door for example run Allygator, an on-demand ridesharing shuttle in Berlin and similar offerings in other German cities. Next to its software platform for organising on demand ridesharing, door2door offers a multimodal journey planning app and an insight tool for city planning analysing multiple data sources to indicate areas underserved by public transport. The different products are clearly related utilising the same data sets and showcase how companies like door2door adjust and add to their product range for different types of customers rather than focusing on just one single product.

This brief, and admittedly simplified, look at customer experience shows how new mobility start-ups differ from public transport operators. It highlights the different starting points from which both types of business position themselves. The new mobility providers have a vastly more sophisticated digital infrastructure compared to traditional PTO companies. The personal connection these new brands plan and manage to establish can be particularly helpful when facing problems like regulations or restrictions on one's business.

The following two case studies highlight how two established digital start-ups approached using their customer relationships for their own cause by mobilising their customers with online campaigning tools.

### 3. Case studies - Mobilising customers for change in local politics

### 3.1. Uber Inc.

### 3.1.1 Business Model

Uber sells (sometimes shared) rides through a mobile app at lower prices than traditional taxi services mostly due to algorithms optimising vehicle utilisation and occupancy. Though Uber sees itself primarily as a technology company and broker between customers requiring to get from A to B and drivers offering services, the European Courts' General Advocate has stated in a preliminary ruling that Uber is a transport company and therefore subject to European and national legislation to operate in the EU (European Court of Justice, 2017).

### 3.1.2 Political/regulatory obstacles

Uber has faced controversy and opposition mostly from existing taxi companies since its

launch in 2009, culminating in large scale protests in Paris, Berlin and London in 2014 with partly violent attacks on Uber cars. Uber faced and still faces regulatory obstacles in many countries including amongst others Australia, India, Denmark, UK, France and Germany as well as in some States in the US. While the issues vary in each of these jurisdictions, they typically evolve around qualification and licenses of drivers (Germany, India, Georgia and Texas USA), status of Uber drivers as employees or individual businesses (UK), taxation (Australia), the legality of the service overall (France, Denmark). A major conflict arose between New York Mayor Bill de Blasio and Uber in 2015, when the Mayor attempted to restrict Uber's operations and introduce a cap on Uber's growth to 1% per annum in New York due to concerns over additional vehicle numbers. The Metropolitan Transit Authority has blamed on demand ride selling services for losses in revenue of up to $10 million (Woodman, 2016).

### 3.1.3 Tactics deployed mobilising customers

In the conflict with NYC Uber deployed a range of tactics to effect change, including some more controversial like targeting journalists and officials critical of the company. Not only did Uber spend large amounts on traditional lobbying, employing former Obama strategist David Plouffe as "strategic adviser" and running TV advertisements as well as getting celebrity endorsements. It also engaged its users to join the cause. "Informing" them about regulatory changes by adding a feature on their app called "de Blasio's" featuring no available cars or wait times of 25 minutes and offering an explanation why. Customers were then encouraged to sign a petition opposing the changes as well as voice their disagreement with the administration and their support for Uber on social media. Uber also offered free rides to demonstrations staged at City Hall (Walker, 2015; Stempeck, 2015).
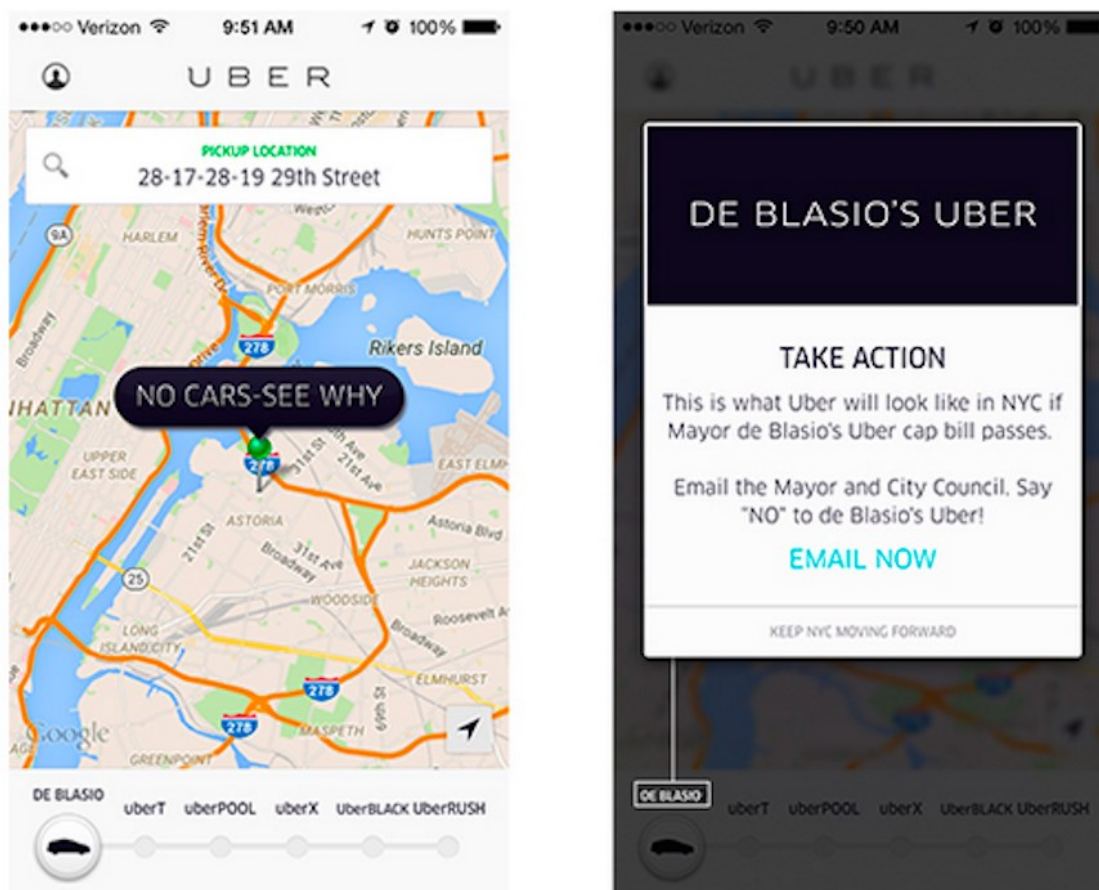
**Figure 4. App feature "de Blasio's" in the Uber App. (Chang, 2015)**

### 3.1.4 Effectiveness

Uber had deployed similar tactics in other contexts e.g. Portland, Oregon and Virginia and been successful there. Uber ceased its campaign in New York after agreeing on awaiting the results of a "traffic study" and NYC decided against introducing the cap. Uber's campaign can therefore be seen as successful in combining different methods particularly harnessing support from its users to achieve its aim of stopping unfavourable legislation.

### 3.2. Other industry example - Airbnb

### 3.2.1 Business Model

Airbnb is an online marketplace for holiday and short term accommodation rentals. Operating on a peer-to-peer level it allows users to operate as 'host', renting out any space from a single room to a whole house, or as a guest renting a specific property offered by a host. Airbnb takes a percentage of the rental fee as commission for facilitating the booking. It has over 3,000,000 lodging listings in 65,000 cities and 191 countries (Airbnb Inc., a).

### 3.2.2. Political / regulatory obstacles

The two main regulatory obstacles center globally around housing affordability and tax avoidance. Many cities with a shortage of housing such as San Francisco, London and Berlin have accused Airbnb of contributing to rising rental rates, because landlords avoid the long term rental market and instead get higher rates for short term housing using the service. Airbnb hosts have also been accused in many localities of avoiding paying tax, thus providing unfair competition to the traditional hotel and hospitality sector.

Regulators have reacted with Berlin now applying a €100,000 fine for anyone renting out more than half of their home for less than two months without a permit, while New York, San Francisco and London have laws restricting short term home rental to a certain amount of time per year.

### 3.2.3 Tactics deployed mobilising customers

Airbnb uses traditional lobbying methods, recently recruiting an expanded public affairs team in EMEA (Muir, 2017). Airbnb has also deployed a 'grassroots' initiative called Airbnb Citizens (www.airbnbcitizen.com) described by Airbnb as a 'Movement and online resource, supported by Airbnb's public policy team, for anyone, anywhere who wants to learn about and advance home sharing as a solution.' Using a similar snowflake organising model (see above 2.1.2) deployed by Marshall Ganz in the Obama Presidential Campaign, it attempts to establish advocate leaders in local communities to advance Airbnb's interests. They claim to have 140+ home sharing clubs around the world (Airbnb Inc., b).
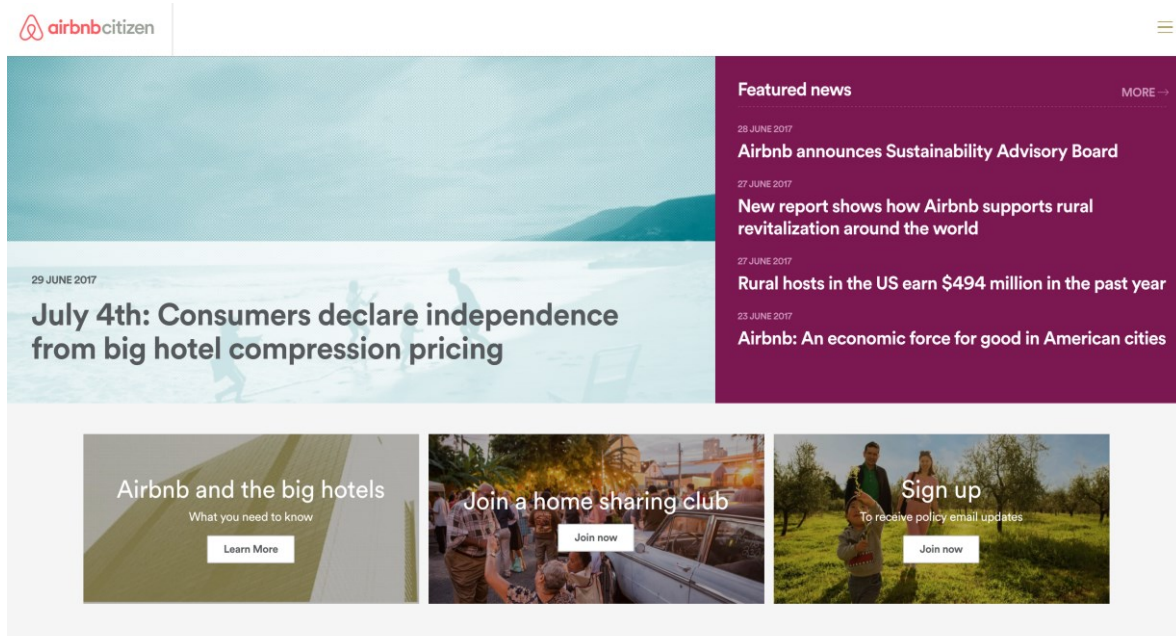


**Figure 5. Airbnbcitizens "grassroot initiative" website. (Airbnb Inc., b)**

### 3.2.4 Effectiveness

There have been documented examples of 'grassroots' Airbnb hosts organising to file lawsuits in the U.S. to oppose laws that affect home sharing thus their ability to rent out their properties on Airbnb. One example in Chicago is a group that claims no affiliation to Airbnb called 'Keep Chicago Livable' who filed a lawsuit in U.S. District Court in Chicago, alleging that parts of a new law regulating holiday rentals were unconstitutional. This has delayed the full rollout of the ordinance multiple times, if ultimately they have recently been implemented (Marotti, 2016).

## 4. Results and Discussion

From the case studies, which highlight just two of the most known digital brands and so-called "disruptors", it is apparent that brand affiliation nurtured through personal brand-consumer relationship management, combined with tried and tested campaigning techniques, can produce significant outcomes. Although there is no quantifiable evidence yet as to the global effectiveness of this new approach, clearly by creating a community of shared vested interested at a local level this greatly increases the possibility of success. It appears that different contexts and political cultures means this approach is likely to meet with mixed success. Both Uber and Airbnb were able to turn the tide on regulation by getting their customers on board as supporters. Not just enjoying or using their service or being part of the network providing services, but sharing the same conviction that in these cases Uber and Airbnb are doing "the right thing" in opposing legislative restrictions.

From a public perspective these "movements" have little in common with genuine civil rights or environmental movements. However, winning "normal" people to fight for corporate interests adds a level of apparent legitimacy, as the true nature may not always be understood. Critics may call these methods "astroturf", i.e. "participation that looks grass roots but actually isn't, because it's been orchestrated to benefit a well-heeled patron" (Walker, 2015) but if brands are able to galvanise this level of support and generate these effects, i.e. overturn decisions by the local authority, other stakeholders have to recognise their force and think of a way to respond.

Stakeholders in public transport don't have to and should not remain passive in the light of these changes. Both their position in the transport market and their influence on politics and the wider public are at stake. While we recognise the vast differences in business models, approaches and conditions between the public transport sector and new mobility start-up world, we argue that PT may have to adopt some of the principles and philosophies deployed by new mobility start-ups, particularly when it comes to their brand and its influence. First it is key, that PTA as well as PTO fully understand and develop a perspective on the approaches and tactics used by mobility start-ups and other new, potentially disruptive, companies. Secondly, PTO's have to consult and formulate a strategy on how to respond to the

challenges of disruptors entering their market sphere and gaining political influence and what lessons they can learn for themselves. Depending on local context it would have to be either the PTA's or PTO's role to establish and deepen the relationship to the citizen, respectively the public transport customer. Citizens and customers increasingly expect frequent communication, explanations for problems and service improvements. New mobility start-ups understand these needs and are eager to fulfil them. PT is at risk of not only losing customers but importance in local politics. Planning ahead and investing in the necessary digital infrastructure to engage citizens and PT customers would not only be useful to enhance services and improve customer experience, but may also lead to affiliation and support for the local authorities' and public transport cause.

If deciding to emulate some of the principles discussed, the established PT stakeholders would start from a promising position. Being a local, often long existing brand the PTO can utilise its firm roots in localism when connecting with a cities' or regions' residents, community groups, businesses and politicians. Whether engaging in listening exercises, understanding and responding to local needs or deploying "champions" to organise support for improvements of local public transport, PT stakeholders need to value and invest in customer relationships and new organising models made scalable with digital. Some regions facing significant growth and transport related challenges have undertaken steps to ensure public support for extensive infrastructure investments and service improvements. Los Angeles region developed an engagement campaign using digital community organising techniques to win support for a vote on increasing sales tax by half- cent to fund its' major transport investment programme Move LA (MoveLA, 2017; NationBuilder, 2017).

## 5.  Conclusions

In extrapolating the value of developing deep customer-brand relationships and building brand affiliation amongst customers, the impact and power new mobility start-ups can garner is increasingly apparent. Particularly when facing a restrictive regulatory environment or changes to their freedoms to operate, new mobility start-ups have the ability to engage their customers as lobbyists on their behalf. They don't see an issue with creating "grassroots pressure" movements calling for restrictions to be lifted.

The public transport sector has a choice in whether to respond by learning from these new companies and their approaches, or continuing operating as they have before, with incremental improvements and a focus on the running of the cities' transportation systems with less attention placed on customers and developing more meaningful relationships.

Leaving their relationship to citizens and customers dormant, and not listening nor communicating with the public creates a gap that easily can and quickly will be bridged by new digitally enabled operators. Their business models may clash with local city or transport related aims but they do provide a deeper personal experience, more attuned to their new globally astute supporters.

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