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„Marketing activity of Born Globals.
Application of the EMICO model in a B2C context.“

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Statutory declaration

I declare that I have developed and written the enclosed Master's Thesis completely by myself and have not used sources without declaration in the text. Any thoughts from others or literal quotations are clearly marked. The Master Thesis was not used in the same or in a similar version to achieve an academic grading or is being published elsewhere.

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Abstract

Even though literature has investigated the various drivers of entrepreneurial globalization, marketing in the context of Born Globals has received little attention. The objective of this study is to contribute to the theory of entrepreneurial marketing from the perspective of early internationalizing firms in an industry characterized by highly undifferentiated products. The research objectives are to compare the marketing strategies of two B2C Born Globals – one successful, one unsuccessful – on the basis of the qualitative EMICO model. In a subsequent quantitative research, those elements of the EMICO model impacting customers in regards to brand loyalty are specified. Findings show that differences exist between the marketing strategies pursued by the two companies as well as the marketing activities of the companies and the customers' needs. Despite their differences, both companies struggled most with building brand loyalty. Quantitative results show that in a B2C Born Global setting, efforts of customer orientation, especially communicating brand uniqueness, explain most of the variance in brand loyalty. This study contributes to the discussion of brand loyalty and differentiation strategies in the realm of Born Globals in highly competitive markets. Due to the limitation in literature of Born Globals sole entry into niche markets, this discussion was neglected to date. Furthermore, this study is a novel addition to existing literature as the assessment of Born Global marketing strategies in a B2C setting is conducted by including the companies' as well as the customers' perspective.

Keywords

Born Globals / Entrepreneurial Marketing / EMICO model / Brand Loyalty / Differentiation Strategy

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Abbreviations

B2B	Business-to-Business
B2C	Business-to-Consumer
BG	Born Global
CO	Customer Orientation
CRM	Customer Relationship Management
CSR	Corporate Social Responsibility
EM	Entrepreneurial Marketing
EMO	Entrepreneurial Marketing Orientation
EMICO	Entrepreneurial, Market, Innovation, Customer Orientation
EO	Entrepreneurial Orientation
INV	International New Venture
IO	Innovation Orientation
MO	Market Orientation
SME	Small or Medium-sized Enterprise
VC	Venture Capital
VIF	Variance Influence Factor

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“If entrepreneurship is the soul of a business, marketing is the flesh.”

Lam & Harker, 2015, p.341

1. Introduction

Born Globals (BGs) have shaped the worldwide economic environment since the early 1990s (Pock, 2010). The swift emergence of these agile, international companies underlie commercial, technological and social progress. BGs contribute to the development of national economies and act as key players in economic ecosystems (Dzikowski, 2018). Today, about a fifth of new enterprises in Europe are considered BG companies (Cavusgil & Knight, 2015).

By expanding rapidly to global markets at an early point in their existence, BGs have challenged traditional stage theories of internationalization. BGs are unique in their speed, scope and extent of globalization: despite being relatively young and inexperienced, BGs model their value chains similar to those of large multinational companies (Øyna & Alon, 2018). As they expand to foreign markets at an early point in their existence they face challenges arising from being new, small and alien (e.g. Hagen et al., 2019). These challenges can be summarized as successfully managing (a) uncertainty of a new business model, (b) complexity arising from a dynamic international environment, and (c) resource constraints (Hagen et al., 2019).

Here, a strong marketing strategy is indispensable: Communicating their product efficiently requires BGs to implement a strategy that fits an environment challenging yet unpredictable (Hallböck & Gabrielsson, 2013).

In comparison to larger, established companies, globalization constitutes a grand challenge for BGs, which lack experience, reputation and legitimacy (Kowalik & Danik, 2019). This study takes place in the industry of providers of sharable, free-floating e-scooters. It is a new industry characterized by little product differences and a large amount of providers entering the market within a short amount of time: between December 2018 and July 2019, eight different providers of e-scooters started business in Vienna.

Even though literature has investigated various drivers of entrepreneurial globalization, marketing in the context of BGs has received little attention (e.g. Hagen et al., 2019; Hallböck & Gabrielsson, 2013; Mort et al., 2012; M. Gabrielsson, 2005). In regards to their large and growing presence in international markets, this is rather surprising (Kowalik & Danik, 2019).

The presented study aims to contribute to this research gap. Its objective is to contribute to the theory of Entrepreneurial Marketing (EM) from the perspective of early internationalizing firms in an industry characterized by highly undifferentiated products. The qualitative EMICO model (Jones & Rowley, 2009) is used to address this topic. The EMICO model is a research framework with which to explore Entrepreneurial Marketing Orientation (EMO) in SMEs. It includes

elements of Entrepreneurial Orientation (EO), Market Orientation (MO), Innovation Orientation (IO) and Customer Orientation (CO).

To date this framework has been developed and used solely in a B2B context leaving little knowledge on its validity and applicability in a B2C BG context (Kowalik & Danik, 2019). This represents a problem because existing research findings are mainly relevant for B2B companies – however, for new companies in all business areas, B2B as well as B2C, market entry processes are costly and risky. Different needs between companies are expected, since company-client-relationships are usually much closer in B2B markets than the relationships B2C companies maintain with their consumers (Kowalik & Danik, 2019). Furthermore, B2B and B2C companies have different approaches regarding their branding (M. Gabrielsson, 2005): as B2B customers follow a rational-based decision-making process, aspects of the realm of functional branding such as quality and performance have higher priority than for B2C consumers (Kuhn et al., 2008). Therefore, results are not transferable to B2C contexts the full extent.

Due to the central role of marketing in the international arena in general (Czinkota & Ronkainen, 2007) and in BG formation in particular (e.g. Knight & Cavusgil, 2004), the gap in research regarding the most efficient marketing strategies for BGs calls for further investigation.

This thesis combines streams of literature on EM and BG research and has an exploratory character. It is of the best of knowledge to the author the first study applying the EMICO model to a sample of B2C BG companies.

The specific research objectives of this study are as follows:

- Compare the marketing strategies of two B2C BGs – one successful, one unsuccessful – on the basis of the EMICO model
- Specify those elements of the EMICO model impacting customers in regards to brand loyalty

To accomplish these objectives, two studies were conducted: Study 1 is a qualitative study conducted by interviews with executives of two e-scooter providers. One of the two companies is the current European market leader, the other was recently acquired by a competitor. Both companies were interviewed on their marketing strategies. Subsequently, the elements of the EMICO model were ranked in relevance according to the information gathered. The results visualize two different hierarchies of EMICO elements: one describing the marketing actions of the successful B2C BG, the other one describing the same of the unsuccessful B2C BG.

Contrasting the marketing strategies of two companies – one successful and one comparable, albeit unsuccessful – helps assess the EMICO framework in the given context, as the individual actions of each company can be compared in their importance of successful EM implementation. By this direct comparison, the aim is to find the specific differences in a BG marketing strategy that might be the deciding factor in whether a company is more or less successful and thus identify possible reasons for their success or failure in the market. The comparison also reveals what elements of a marketing strategy B2C BGs should focus on in order to be successful. The research context within the same company category further supports comparability of behaviours and strategies. As BGs lack time to test out different strategies, the right focus allows them to operate efficiently and concentrate their limited resources (Knight et al., 2004). Findings of study 1 show differences between the marketing strategies pursued by the two companies. The company leading in the European market pursued activities of seven of the 15 elements researched in their core strategy, with those seven covering all four main orientations of the EMICO model. The other company focused on merely three elements as their *Core concepts* and covered only two orientations.

The greatest challenge for both companies interviewed was building brand loyalty. This seems logical, as this study takes place in a highly competitive industry characterized by little product differentiation. In a discussion of the results, the study supports findings from previous literature, where BGs mostly differentiate through product differentiation and neglect marketing differentiation efforts as well as cues of emotional branding (Efrat et al., 2017).

With Study 2, the research is accompanied by a quantitative study, which explores whether the EMICO elements most strongly pursued by B2C BGs as uncovered in study 1 correspond to the customers' needs. This is a novel addition to existing literature as the assessment of BG marketing strategies in a B2C setting is conducted by including the companies' as well as the customers' perspective.

The research model for study 2 takes into account the results gained in study 1. The elements of the EMICO model coined as core elements of the marketing of successful BGs were tested for their relevance to consumers.

Study 1 showed that in the marketing strategy of B2C BGs, actions of all four orientations received attention in the marketing of the successful BG. The EMICO elements pursued by the successful BG were transferred into matching scales. Study 2 investigates the impact brand innovativeness, brand communication, brand design, brand sustainability and brand uniqueness have on brand loyalty in a BG context.

By incorporating the companies' as well as the consumers' point of view, it is uncovered that discrepancies exist between the marketing strategies pursued by companies' and its customers' needs.

The findings add to literature as BGs to date have been depicted as gaining differentiation assets mainly through product differentiation in niche markets (Rennie, 1993; Knight & Cavusgil, 2004; Rennie, 1993; Altshuler & Tarnovskaya, 2010). Contrary to this, the present study investigates BGs which are present in highly competitive markets with little product differentiation. Here, they struggle to gain brand loyalty in the short amount of time they are present in a market as loyalty usually builds up gradually over an extended period (Salomão, 2019): compared to larger enterprises, BGs lack time to build this asset up over a longer period, as they expand rapidly and globally. The novelty about this discussion is the notion of brand loyalty in the realm of BGs in competitive markets. Due to the limitation in literature of their sole entry into niche markets, this discussion was neglected to date. This study's findings can be generalized to other BGs in highly competitive or saturated markets.

For practitioners, a relevant insight gained through this study is the finding that of the elements tested, communication towards customers stands out as the most significant factor influencing brand loyalty. Especially brand uniqueness explains a large part of its variance. Through implementing marketing differentiation strategies and pursuing efforts regarding emotional branding, BGs in competitive markets would benefit by gaining brand loyalty (Efrat et al., 2017).

This study contributes to the international business field, especially to international entrepreneurship and international marketing research and management. In particular, it enhances the understanding of EM in BGs. Incorporating EM literature with the study of BGs furthers our understanding of the entrepreneurial aspects of international marketing in such firms (Hallbäck & Gabrielsson, 2013).

The following master thesis is structured into seven parts. The (1) introduction is followed by (2) the literature review, (3) the presentation of the research process, (4) the qualitative research, including methodology and results, (5) the quantitative research including hypotheses development, methodology, statistical assumptions and results, (6) the discussion and (7) a conclusion, including theoretical and managerial implications as well as future research and research limitations.

2. Literature Review

2.1. Defining the term *Born Global*

As the interest in quickly globalizing firms rose in the 1990s, it was by this time that many different terms for the concept emerged. The most common ones used today are *Born Globals* and *International New Ventures (INVs)* (Pock, 2010). In this text as well as many larger studies on the topic, both terms are being used interchangeably.

For an overview of the most important definitions of the terms BG and INV see Table 1.

Two definitions are the most widespread: One by Oviatt and McDougall (1994), another by Knight and Cavusgil (1996). Both definitions are commonly used in the literature and as the basis for studies. Oviatt and McDougall (1994) define an INV as “...*a business organization that, from inception, seeks to derive significant competitive advantage from the use of resources and the sale of outputs in multiple countries*” (p. 49). Consistent with this, Knight and Cavusgil (1996) define BGs as “...*small, technology-oriented companies that operate in international markets from the earliest days of their establishment*” (p. 11), specifically within the first two years of their founding, and which take in at least 25% of their revenue in one or more foreign markets. In a later article (2004), Knight and Cavusgil define BGs as “*entrepreneurial start-ups that, from or near their founding, seek to derive a substantial proportion of their revenue from the sale of products in international markets*” (p. 124). The cut-off of 25% has later been criticized (Knight & Liesch, 2016): Researchers point out that this number highly depends on the context of the respective BG, for example the size of its home market or the size of neighboring markets.

In 2015, Cavusgil and Knight discuss the definition again and add that their definition focuses on “(1) *young companies, (2) the firm as the unit of analysis; and (3) pursuing internationalization mainly through exporting*” (p. 4) while emphasizing that BGs are resource-poor.

Author, Year	Definition/Vision	Time before starting export	Export versus global growth/age	Term defined
Rennie, 1993	Small to medium-sized companies with exporting as the primary goal of the firm even upon its inception.	Begin exporting, on average, 2 years after foundation.	Achieved 76% of their total sales through exports	BG
Oviatt & McDougall, 1994	Business organizations that, from inception, seek to derive significant competitive advantage from the use of resources and the sale of outputs in multiple countries.	-	-	INV
Knight & Cavusgil, 1996	Small, technology-oriented companies that operate in international markets from the earliest days of their establishment.	Begin exporting one or several products within 2 years of establishment.	Tend to export at least a quarter of total production.	BG
Knight & Cavusgil, 2004	Entrepreneurial startups that, from or near their founding, seek to derive a substantial proportion of their revenue from the sale of products in international markets	-	Exporting at least 25% of total production.	BG
Servais et al., 2007	Firms whose combined sourcing and selling activities are most internationally oriented.	Within 3 years of establishment.	More than 25% of foreign sales or sourcing outside home continent.	BG
Zhou et al., 2010	Independently operating small and medium-sized firms.	An international market entry process that occurs within 3 years of firm's inception	Generating at least 20% of total sales from multiple countries. Founded in 1990 or later.	INV
Cavusgil & Knight, 2015	(1) young companies, (2) the firm as the unit of analysis, (3) pursuing internationalization mainly through exporting	-	-	BG

Table 1: Definitions of Born Globals and International New Ventures

Source: Adapted from Gabrielsson et al. (2008), and Gabrielsson & Kirpalani (2012).

Since a variety of definitions exist, Pock (2010) summarizes key factors which relevant BG definitions have in common:

- The percentage of sales that are made in the non-home market
- The speed of globalization
- The amount and geographical location of their international markets

All definitions have the common objective to operationalize the early and fast globalization of BGs. They focus on globalization activities already shortly after founding of the company as well as reaching a high international market penetration in a short amount of time. Key element of the definitions is therefore speed of globalization (Pock, 2010).

The definition of the term BG has been debated since its inception (e.g. Dzikowski, 2018; Mostafiz, Sambasivan & Goh, 2020). Researchers until now have agreed on the fact that BGs expand internationally from the outset, but discrepancies in definitions can be found in the detail. Discrepancies in definitions led to research results which are difficult to compare. Concluding, it shows that by the time there is no accepted qualitative nor quantitative definition for BGs (Pock, 2010).

Up to now, theories on BGs lack development and are fragmented (e.g. Dzikowski, 2018; Mostafiz et al., 2020). Furthermore, no definition exists of what defines a successful BG (Coviello, 2015) and knowledge is lacking when discussing the capabilities, resources and strategies it takes for a BG to survive long-term (Knight & Liesch, 2016).

As a young company, the BG tends to lack financial and human resources substantially as well as other physical resources. These resources might be of a kind which older, established firms already gained over the course of their existence and with which they have already succeeded in foreign markets (Kocak & Abimbola, 2009).

Interestingly, size and the monetary value of a company have been dropped as success factors since first definitions came up. Whilst many of earlier definitions incorporate firm size in terms of number of employees, later definitions ignore this factor. This might be because start-ups have since proven that the size of a company does not correlate with its successful international performance.

It is interesting that the relation between success of BGs and their venture capital or their foreign investment has been little discussed in the realm of BGs. Since higher amounts of capital inevitably lead to a higher amounts available for marketing investments, this is an external factor that probably has a large impact on the marketing strategy of a BG company.

From the learning of previous discussions on the definition of BGs, this study uses a definition based on the research of Oviatt & McDougall (1994) and Knight & Cavusgil (1996) extended in single aspects by Pock (2010): BGs are independent companies that, from their founding, try to gain significant competitive advantages from the commitment of resources and the sale of products or services in several countries. Within three years of their founding they generate at least 25 percent of their turnover in five or more international markets.

Since this definition is based on the two most widely used definitions, this facilitates the comparability to other studies.

In BG literature, it is discussed what performance measure is most appropriate for BGs. Jiang et al. (2020) distinguish between financial and non-financial measures and name growth and performance as key outcomes of BG operations. Growth can be calculated as change of international sales as a percentage of total sales. In addition, researchers select return on equity, return on investment, and relative market share as performance measures (e.g. McDougall and Oviatt, 1996; Zahra et al, 2000). In comparison to financial measures, using market share as a performance indicator is more reliable because BGs initially aim to quickly penetrate a market rather than to be profitable (Jiang et al., 2020). It is often discussed that rapid international market entry and market share are the key performance indicators for BGs (e.g. Hallbäck & Gabrielsson, 2013; Kocak & Abimbola, 2009).

After the term *Born Global* was coined and the theoretical foundation of the field was built, the interest of research on BGs gradually increased (Mostafiz et al., 2020). While studies on the characteristics and the behavior of BGs has been extensive over the past two decades, insights into their marketing strategies are scarce and still in a nascent stage (Hallbäck & Gabrielsson, 2013).

Findings on marketing strategies of BGs show that active opportunity creation (Mort et al., 2012), new sales channels (M. Gabrielsson & Kirpalani, 2004) and innovative branding (M. Gabrielsson, 2005) are part of a marketing strategy that lead to a successful BG. BGs also often use a low-cost marketing strategy and marketing differentiation strategy (Martin et al., 2020). In a broad literature review, Aspelund et al. (2007) find that the marketing strategies of BGs are often characterized by:

- focus on speed
- no linear development process, but heterogeneity with much variation between firms
- often a combination of market spread, with resource focus on a few of these markets
- most often a niche product strategy
- market selection with limited importance of psychic and geographical distance

- strong influence of manager, personal network and experience
- often focus on lead markets and growth markets
- entry strategies characterized by low commitment
- attention to identifying and establishing agreements with partners

BGs have a geocentric perspective on the world: They perceive the entire world as their marketplace. This is a strong motivation to participate in international marketing (Hartsfield et al., 2008). International marketing is “*the process of planning and conducting transactions across national borders to create exchanges that satisfy the objectives of individuals and organizations*” (Czinkota & Ronkainen, 2007, p. 4). This behavior forces companies to adjust their marketing to fit to each market they enter. The key is to adapt the marketing mix to each environment in which they operate (Czinkota & Ronkainen, 2007).

In studies on international marketing, literature has largely neglected SME-specific conditions, especially those of BGs and the discussion of their marketing strategy and marketing mix adoption .

A concept that has gained attention in recent literature in the concept of Entrepreneurial Marketing (EM), which examines the behavior of young, small, resource-constrained firms (Hills et al., 2008) and is thus well suited to explain the marketing behavior of BGs (Kocak & Abimbola, 2009).

2.2 The concept of Entrepreneurial Marketing

The theoretical concept of Entrepreneurial marketing (EM) is grounded in the knowledge bases of marketing, innovation, entrepreneurship as well as customer engagement and relationships (Hills et al., 2008, 2010; Jones & Rowley, 2011). EM can be defined as “... *an agile mindset that pragmatically leverages resources, employs networks, and takes acceptable risks to proactively exploit opportunities for innovative co-creation, and delivery of value to stakeholders, including customers, employees, and platform allies*” (Alqahtani & Uslay, 2020, p. 64). EM is a way of thinking, an agile mindset, that can form a hard-to-imitate basis of competitive advantage (Alqahtani & Uslay, 2020). Key premises of EM are summarized in Table 2.

Source	Key premises
Sarasvathy, 2001	<ul style="list-style-type: none"> ● EM encourages taking risks while being cognizant of affordable loss
Hills et al., 2008	<ul style="list-style-type: none"> ● EM excels in utilizing experience, market immersion, resources, and networks to achieve marketing efficiency
Read et al., 2009	<ul style="list-style-type: none"> ● EM employs heuristics in decision making and engages in high-speed experimental marketing enabling more flexibility, iterations, and pivots.
Morrish et al., 2010	<ul style="list-style-type: none"> ● EM tends to use more flexible structures and promotes a flatter hierarchy ● EM gives the same weight to consumers and entrepreneurs in decision making to balance market needs with entrepreneurs' progressive vision
Jones & Rowley, 2011	<ul style="list-style-type: none"> ● CO is more into EM than MO
Vasilchenko & Morrish, 2011; Lee et al., 2012	<ul style="list-style-type: none"> ● EM adopts creative co-creation approaches such as crowdsourcing, crowd creation, and open innovation
Coviello & Joseph, 2012; Whalen & Akaka, 2016	<ul style="list-style-type: none"> ● Opportunity co-creation is a unique dimension of EM
Vargo & Lusch, 2004	<ul style="list-style-type: none"> ● EM considers all stakeholders as resources integrators, and, therefore, gives balanced attention to different parties in the value creation chain
Whalen et al., 2016	<ul style="list-style-type: none"> ● The intersection of S-D logic and effectuation represents a great foundation for EM to confront uncertainty ● EM replaces <i>value-in-exchange</i> with <i>value-in-use</i> and heavily benefits from operant resources
Alqahtani & Uslay, 2020	<ul style="list-style-type: none"> ● EM excels by leveraging networks to co-create value and opportunities throughout the customer journey including co-ideation, co-innovation, co-promotion, co-distribution, co-pricing, co-maintenance and co-disposal ● EM promotes a holistic thinking to improve performance ● While S-D logic identifies the underlying principles of EM, effectuation explains how these principles are executed

Table 2: Axioms of Entrepreneurial Marketing

Source: Alqahtani & Uslay, 2020, p. 65.

Firms that follow an EM strategy concentrate on the creation of wealth or value and often create new primary demand for an innovation. Tactical flexibility is a core element of EM and marketing efforts are focused on promotion and selling. Instead of using formal market research, EM companies rely on their intuition, immersion, and experience. Their strategies are adaptive and flexible and less top-down-oriented or strategically planned (Hallbäck & Gabrielsson, 2013). Less orientation on financial metrics allows them to experiment with marketing strategies and make decisions quickly and flexible (Hills et al., 2008).

Important to this notion is the entrepreneurial dedication to delivering customer value, which can be difficult as the assessment of its success lies in the eyes of the customers (Jones et al., 2013). Compared to traditional marketing (also: *administrative marketing*, Hills et al., 2008), the center of all marketing activities in EM is the entrepreneur. Their competencies, ideas and networks are established to conduct marketing (Ioniță, 2012). Before developing a new product, traditional marketers would assess market needs. Entrepreneurial markets on the other hand start with the idea of a product, and then try to find a market for it. Hence, entrepreneurial

marketers are much more innovation-focused (Kowalik & Danik, 2019). While the focus of traditional marketing theory is the efficient use of the firm’s existing resources and resource allocation, in EM, actions are not constrained by resources currently controlled by the firm. Instead, entrepreneurs aim to do more with less, by obtaining new resources, other actors’ resources, stretching resources, combining resources and using resources in new and innovative ways (Mort et al., 2012). Main differences between Traditional and Entrepreneurial Marketing are summarized in Table 3.

Marketing Principles	Traditional Marketing	Entrepreneurial Marketing
Strategic orientations	Customer orientated (market driven)	Innovation oriented (idea driven)
Strategy	Top-down approach: segmentation, targeting, positioning	Bottom-up approach: targeting a limited base of customers, further expansion
Methods	Marketing mix (4/7 Ps)	Interactive marketing methods, word-of-mouth, direct selling, referrals
Market intelligence	Formalized research and intelligence systems	Informal networking and information gathering

Table 3: Differences between Traditional and Entrepreneurial Marketing

Source: Ioniță, 2012, p. 138.

Since large firms are challenged with stronger internal barriers, EM can be found in strategies of small firms rather than in large companies. This approach has been associated with marketing actions that challenge established market conventions: EM is more opportunity-driven than traditional administrative marketing and crosses marketing with innovativeness, which is crucial to entrepreneurship (Hallbäck & Gabrielsson, 2013). EM thrives with innovation and value creation deviating from those of conventional marketing in aspects such as customer interface, risk management and resource leverage (Hills et al., 2008; Morris et al., 2002).

EM is crucial for companies to become or remain relevant and competitive under highly uncertain market conditions and is an especially relevant theoretical base for firms with high growth objectives. BGs operate in risky environments with low forecasting possibilities, low entry barriers, changing managerial objectives and structures that enhance change. In such fast-changing and complex environments, anticipated profits from current processes become highly uncertain, so companies must continuously exploit new opportunities. Companies are under pressure to be proactive, innovative, and agile in developing and implementing marketing strategies. For SMEs it is recommended to not differentiate between marketing, innovation, entrepreneurship and customer engagement but rather to see all actions holistically in order to be successful (Alqahtani & Uslay, 2020).

In EM, innovativeness is a key dimension: active opportunity creation, innovative branding, and novel sales channel solutions are important for the success of the given EM strategy. Furthermore, adaption decisions are crucial for EM, since entrepreneurial companies often enter a large amount of diverse markets rapidly and early on in the firms' life. Thus, the innovativeness and adaption of the marketing strategies of BGs can decide on their success against competitors (Hallbäck & Gabrielsson, 2013).

The seven dimensions of EM defined by Morris et al. (2002) are:

- Risk-taking
- Customer intensity
- Innovativeness
- Opportunity focus
- Proactiveness
- Resource leveraging and
- Value creation

These seven dimensions of EM build the basis for comparing traditional marketing with EM and lead to the four constructs of entrepreneurial orientation (EO), market orientation (MO), innovation orientation (IO) and customer orientation (CO) (Yadav & Bansal, 2020). These four orientation measures are included in the Entrepreneurial Marketing Orientation (EMO) model, which was proposed as a new basis for research exploration of EM in SMEs (Jones & Rowley, 2011). As this model builds the basis for the EMICO framework, which is the qualitative foundation of this study, the EMO model (Figure 1) is explained in more detail hereafter.

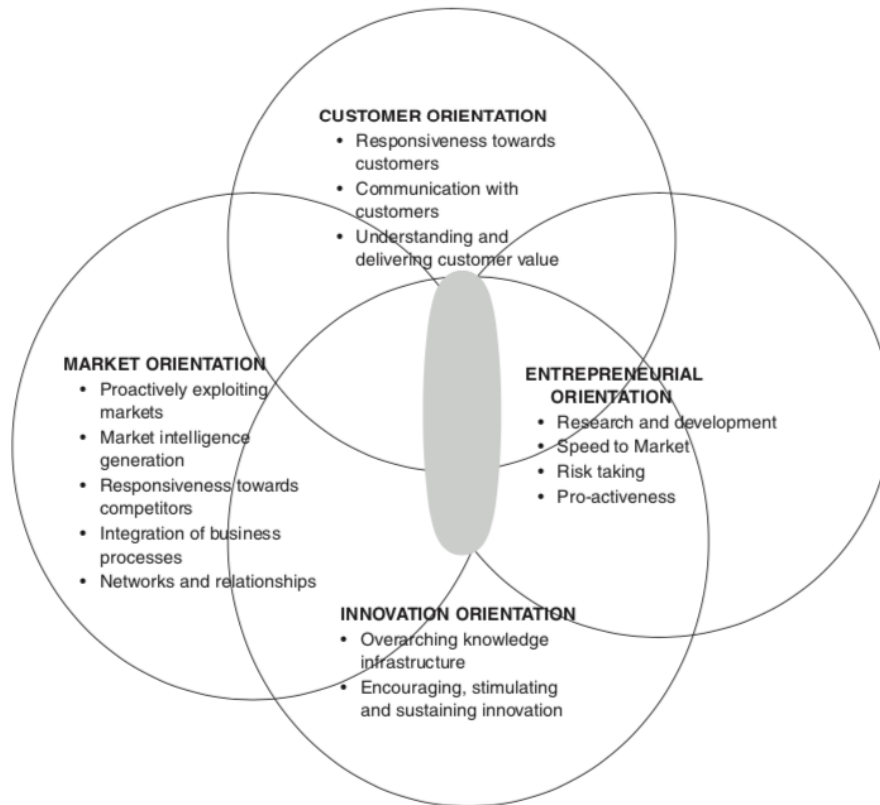


Figure 1: Entrepreneurial Marketing Orientation (EMO) model

Source: Jones & Rowley, 2011, p.31.

2.2.1 Entrepreneurial Orientation

Entrepreneurial Orientation (EO) roots in the literature of strategic management, conducting a firm's behavior to translate its vision and mission into competitive advantage (Yadav & Bansal, 2020). EO is a company culture which encourages risk-taking and innovation (Knight & Cavusgil, 2004). This kind of behavior can be found in BGs: BGs foster a culture advantageous to adaption and innovation (Knight & Cavusgil, 2004). Their organizational culture is characterized by agility and flexibility: this allows the firm to establish ways of innovation and adaption easily, thus making it better equipped to adapt to different foreign markets fast in comparison to larger, established firms (Knight & Cavusgil, 2004). EO drives a company to continuously develop products and improve their business practices (Covin & Slevin, 1989). Risk-taking behavior facilitates companies' entry into foreign markets (Knight & Cavusgil, 2004). EO is largely based on entrepreneurial personality traits (Jones & Rowley, 2011). These can be described as the company's behavior to implement its mission, vision and competitive advantage (Yadav & Bansal, 2020). Often incorporated are dimensions of innovation and proactiveness towards opportunities (Jones & Rowley, 2011). Knight and Cavusgil (2004) found that managers of BG firms felt that having an entrepreneurial and innovative mindset, paired with a

strong set of marketing capabilities, is crucial when approaching global markets. These entrepreneurial traits in combination with other resources permit the BG to take on business opportunities in foreign markets (Knight & Cavusgil, 2004).

A high degree of EO in a firm leads to intense entrepreneurial marketing practices and thus a positive effect on company performance (Yadav & Bansal, 2020).

In the EMO model, the following dimensions are involved (Jones & Rowley, 2011):

- (1) Research and development
- (2) Speed to market
- (3) Risk-taking
- (4) Proactiveness

Proactiveness means that the company is able to foresee future customer demands and thus gain a first-mover advantage. Firms with an EO can be risk-taking in the sense that they commit substantial resources to uncertain results (Yadav & Bansal, 2020). These two properties are typical of successful BGs, since these lack time to conduct early planning of marketing activities, which is said to be essential in international marketing (Luostarinen & Gabrielsson, 2006). At the same time, BGs might lack financial resources or investors' trust to recover from marketing failures (Luostarinen & Gabrielsson, 2006).

The higher the degree of EO in a firm, the more intense are its entrepreneurial marketing practices. It also has a positive effect on the performance of the firm (Yadav & Bansal, 2020).

2.2.2 Market Orientation

The concept of Market Orientation (MO) describes how the firm behaves in its external environment, the market (Yadav & Bansal, 2020). It refers to the development of customer value through marketing in foreign markets (Y. Kim, 2003).

MO is widely recognized as having a positive effect on business performance. Aspects of MO that are incorporated in the EMO model are (Jones & Rowley, 2011):

- (1) Proactively exploiting markets
- (2) Market intelligence generation
- (3) Responsiveness towards competitors
- (4) Integration of business processes
- (5) Networks and relationships

MO describes the organizational capability of effectively and efficiently creating better customer value than the competitors (Kocak & Abimbola, 2009; Narver & Slater, 1990). The goal

of market-oriented companies is to create satisfied customers, by offering products or services that customers perceive as valuable (Hartsfield et al., 2008). By striving to present value to consumers, MO fosters superior customer relationships (Narver & Slater, 1990).

When companies have a strong focus on MO, they often score in quality in their products and services (Knight & Cavusgil, 2004). This reflects the firms' effort to surpass consumers' expectations (Hartsfield et al., 2008). If consumers perceive the product or service as high in value, this increases the power of the brand and helps to set the product or service apart from competitors (Knight & Cavusgil, 2004).

Effectiveness of a firm's marketing capabilities is enhanced by networking and partnerships or generally by the entrepreneur's relationships with relevant stakeholders. These activities help the company to introduce itself to new clients, target new audiences, meet potential suppliers and widen the company's resources. MO aims at current market demands and increases the firm's performance (Yadav & Bansal, 2020).

In contrast to a 'traditional' marketer, who begins with the product development having the market needs in mind, entrepreneurs shape the market with their operations and are less focused on the existing needs of customers, instead they predict future needs and trends more strongly (Yadav & Bansal, 2020).

Advancing technologies allow companies to communicate with their customers more efficiently as well as gaining knowledge on the competition (Y. Kim, 2003).

Knight and Cavusgil (2004) note that market orientation is a strategy that is important for any business to succeed, it appears especially crucial for BGs.

2.2.3 Innovation Orientation

Innovation Orientation (IO) describes the company's skill in creating novel products, ideas and processes (Muthusamy, 2009; Jones & Rowley, 2011). Innovativeness can be defined as "*a firm's openness to new ideas and new ways of meeting customers' needs*" (Kim et al., 2011, p. 881). In regards to BGs, Kim et al. (2011), also include the notion of developing "*new offerings to meet the demands of customers within its niche markets*" (p. 881).

Because innovation is necessary to deal with changes in a dynamic business environment, it is generally seen as a fundamental element of EM (Jones & Rowley, 2011). Innovation also contains the notion of creativity and creative approaches to marketing as well as the general business practice (Yadav & Bansal, 2020). Dimensions incorporated into the EMO model are (Jones & Rowley, 2011):

- (1) Overarching knowledge infrastructure

(2) Encouraging, stimulating and sustaining innovation

Innovativeness is seen as a facilitator of companies' competitiveness (Augusto & Coelho, 2009; Dibrell et al., 2014) and performance (Rubera & Kirca, 2012; Rhee et al., 2010; Gebauer et al., 2011; Hult et al., 2004). Innovativeness has been found to be crucial to the survival of BGs from the perspective of organizational culture (Knight & Cavusgil, 2004; Knight et al., 2004) or in terms of product or service (Kim et al., 2011; Kocak & Abimbola, 2009; Weerawardena et al., 2007). Earlier studies characterize marketing as the core of innovativeness in BGs (Knight & Cavusgil, 2004). Hallbäck and Gabrielsson (2013) found that innovativeness and adaptation are key dimensions of the marketing strategies in BGs. Cavusgil and Knight (2015) also found that innovative initiatives are the foundation for new product development and opening of new markets, while at the same time serving existing markets better.

Where large, established firms usually experience a high level of bureaucracy that hinders innovation activities, smaller or younger firms are more flexible, less bureaucratic, and generally enjoy internal conditions that encourage innovativeness and enhances the ability to transform product and process innovations into business activities that support superior business performance (Knight & Cavusgil, 2004).

Colclough et al. (2019) found that no relation can be established between an SME's resource base and its orientation towards innovation. In this context they found that the growth ambitions of SMEs' managers and owners strongly and positively influence its focus on innovation (Colclough et al., 2019).

2.2.4 Customer Orientation

Customer Orientation (CO) is rooted in early services marketing literature and is by some authors seen as the most important pillar in marketing. Some authors find CO related to MO (Knight et al., 2004), in other parts of the literature, CO is seen as a part of MO (Narver & Slater, 1990).

In previous studies at the intersection of CO and BGs, CO is defined as "*the extent to which a Born-Global firm focuses its efforts to serve its customers' needs and cultivate long-term relationships*" (D. Kim et al., 2011, p. 880).

CO is responsible for creating products or services of superior value and has the creation of customer value as the highest goal. In order to be successful as a company, the firm has to fully understand the customer's needs in order to build a close relationship with her (Jones & Rowley, 2011). CO in smaller firms can be more easily achieved than in large firms, since small companies enjoy a much shorter line of communication towards the customers (Coviello et al.,

2000). As SMEs tend to have more personal contact with consumers, they also tend to emphasize customer-based performance measures (Coviello et al., 2000).

As small firms are more likely to be agile in their ability to respond to customer requests, they are able to react to customer needs quickly. The goal is to understand the needs of the customer and satisfy those needs better than competitors (Jones & Rowley, 2011). If customer relationship management (CRM) is done well it leads to long-term relationships, customer loyalty, brand value and increased sales (Yadav & Bansal, 2020). Scales that inform the CO aspects are (Jones & Rowley, 2011):

- (1) Responsiveness towards customers
- (2) Communication with customers
- (3) Understanding and delivering customer value

Due to rapidly changing technology and global competition, companies are facing more competition than ever; this has led to more marketing focusing on the customer (Y. Kim, 2003).

Customer Orientation drives key marketing strategies in BGs and maximizes customer value: it allows BGs to operate and allocate their limited resources efficiently (Knight et al., 2004).

Akman and Yilmaz (2008) find that CO enhances the innovative capability of SMEs. For example, creative approaches to marketing such as co-creation, crowd creation and crowdsourcing help BGs to leverage their limited resources (Vasilchenko & Morrish, 2011). They co-innovate with their customers and engage them in their innovation process to receive direct input and as well as valuable ideas and information (Lee et al., 2012). As time for market research is tight in BGs, entrepreneurs might use their personal connections with consumers to get immediate feedback (Morrish, 2011).

2.3 Entrepreneurial Marketing in Born Globals

BGs have limited resources and capabilities because they are young. Due to their being new and foreign, they face restrictions in access to resources and networks. In order to overcome these challenges, BGs must apply novel approaches to marketing (Hallbäck & Gabrielsson, 2013). These approaches are well described by the concept of Entrepreneurial Marketing (EM), which examines the behavior of young, small, resource-constrained firms (Hills et al., 2008).

Although connecting the EM concept with BGs is the theoretical background of only little studies (Kocak & Abimbola, 2009; Mort et al., 2012), it seems obvious to do so: EM is a potential tool for understanding how early internationalizing firms compete against competitors despite their limited resources, since innovative approaches to marketing may be of particular value in

these firms (Hallbäck & Gabrielsson, 2013). The pertinent stream of literature interlinks international marketing and international entrepreneurship by applying an entrepreneurial theory lens to the international marketing strategies of rapidly internationalizing firms (Yang & Gabrielsson, 2018). By conducting innovative, pro-active marketing and leveraging the resources of others, entrepreneurs can overcome some of the liabilities related to being new, small and foreign (Yang & Gabrielsson, 2018).

Mort et al. (2012) found that within INVs, EM relates to developing innovative products in close interaction with customers, leveraging resources of partners and using innovative techniques to reach market acceptance. They identify four key strategies of EM: opportunity creation, product innovation based on customer intimacy, resource enhancement and legitimacy. These core elements of EM are also linked to enhanced performance.

To integrate the concept of EM with the BG context, the concept of adapting marketing strategies to different markets must be acknowledged (Hallbäck & Gabrielsson, 2013). When a company is reaching out to foreign markets, one crucial decision always is whether to standardize or adapt the marketing strategy to the taste and external circumstances of the foreign market (Calantone et al., 2006). Earlier research found that BGs need to focus on a homogenous product offering (Gassmann & Keupp, 2007) and a standardized marketing strategy (Gabrielsson et al., 2012), especially regarding branding efforts (Gabrielsson, 2005).

Concluding, EM strategies in BGs call for attention to two dimensions: Marketing strategy innovativeness and adaption of marketing strategies to countries and their customers. International entrepreneurial marketing strategy in BGs can be defined as the set of strategic choices concerning the innovativeness and adaption of marketing to international markets (Hallbäck & Gabrielsson, 2013).

Hallbäck & Gabrielsson (2013) found that innovativeness in BGs goes beyond product or technology characteristics but emerged in other elements as well: value innovation, marketing co-creation, and low-cost marketing. Adaption as well plays an important role and can be distinguished between country and customer adaption. The development and performance of these marketing dimensions and their elements in BGs can be understood by the conditions of the external environment and the firm's market orientation and growth.

A small number of researchers have used the EMO framework to explain the marketing behavior of SMEs or BGs (Table 4).

Author	Sample	Findings
Jones & Rowley, 2009	6 SMEs from UK, software sector	<ul style="list-style-type: none"> • CO and EO most important • SMEs are adept at leveraging resources • Networks, partnerships and alliances are prevalent • Resources for business, innovation and marketing are obtained by using networks and relationship building approaches • Founder of the firm is central to marketing. Method of marketing is based on their personal reputation, trust and credibility • Owner-manager of firm are salespeople for the firm and represent the firm's brand identity • Marketing tactics are two-way with customers: products are often co-created with customers • Marketing decisions are based on daily contacts and networks • Value is created through effective relationships, partnerships and alliances • Word-of-mouth (WOM) is prevalent and a cost-effective and credible way-to-market • Bottom-up-approach to marketing • Decision-making is non-bureaucratic and flexible
Kocak & Abimbola, 2009	5 BGs from Turkey	<ul style="list-style-type: none"> • MO and EO are capabilities that make up the entrepreneurial approach • MO, EO, IO and CO are all main sources of success • Organizational structure, entrepreneurial process, marketing and learning orientation are crucial for early internationalization
Jones et al., 2013	12 SMEs from UK and USA, software sector	<ul style="list-style-type: none"> • EMO differs in different industries and countries • MO, EO and IO most relevant for firm performance and appear to increase firm growth • CO can act as an inhibitor for innovation • Successful firms adopt their focus in situation and market climate • Companies leverage resources through networks • Different EM activities are more important at different stages of firm growth; constant remains the focus on R&D and Sales and Promotion • Sales and marketing focus paired with innovation focus creates opportunities for market leadership • Use of networks creates vital additional resources
Hallbäck & Gabrielson, 2013	3 BGs from Finland	<ul style="list-style-type: none"> • Core elements of EM in BGs are innovativeness (value innovation, co-created marketing, low-cost marketing) and adaption to local markets and clients
Kowalik & Danik, 2019	4 BGs from Poland, medium technology sector	<ul style="list-style-type: none"> • All dimensions relevant, only <i>Exploiting markets</i> and <i>Integration of business process</i> rather unimportant to BGs • Cooperation of company departments and continuous knowledge sharing is seen as marketing success factor • CO and IO most important concepts for BGs fast expansion • CO and MO are most important for international marketing success of BGs

Table 4: Findings from application of EMO framework to SMEs

Source: Own elaboration.

Only limited studies focus on the factors that influence EM in BGs (Kocak & Abimbola, 2009). It can be suggested that various internal as well as external factors influence the development of international EM strategies and intervene with their successful performance (Hallbäck & Gabrielsson, 2013). Earlier literature suggests to consider the external environment, the company's market orientation and the growth phase of the respective firm (Hallbäck & Gabrielsson, 2013). The external environment can be described by the turbulence and diversity which shape the constraints, contingencies, opportunities and problems faced by the company in the respective market (Achrol, 1991). The degree of global diversity suggests heterogeneous characteristics of customers and markets and therefore influences adaption and standardization decisions of the firm (Calantone et al., 2006). Market orientation, meaning the company's culture and approach towards customers and competitors as influences EM strategies as well (Morris et al., 2002). Generally within BG research, market orientation has been associated with innovation and therefore leads to better performance (Kocak & Abimbola, 2009).

Recent literature suggests that EM might be related to the performance of BGs (Mort et al., 2012), since both innovativeness and adaption may influence elements of marketing performance such as market share, new product introduction rate, and achievement of the intended customer base (Morris et al., 2002).

EMICO framework

Since EM is a rather new concept, its dimensions and operationalizations are still not fully captured (Kowalik, 2016). One approach to bundle different concepts and ideas of EM is the EMICO framework (Table 5). EMICO stands for Entrepreneurial, Market, Innovation and Customer Orientation. The EMICO research framework is a qualitative research tool for analysis of EM in SMEs and was first presented by Jones and Rowley (2009). It is based on the EMO framework and offers perspectives through which EM orientation, interactions and behaviours in SMEs may be understood. It contains 15 dimensions in total, each of them related to one orientation of EO, MO, IO or CO.

Most of the studies published on the EMICO model and its dimensions examine the role of the dimensions on a firm's performance and found significant impact of all dimensions on the performance of a company (Yadav & Bansal, 2020).

A more detailed description of the dimensions can be found in Table 17.

Concept	Dimension
Entrepreneurial Orientation	Research and development
	Speed to market
	Risk-taking
	Proactiveness
Market Orientation	Exploiting markets
	Market intelligence generation
	Responsiveness towards competitors
	Integration of business processes
	Networks and relationships
Innovation Orientation	Knowledge Infrastructure
	Propensity to innovate
Customer Orientation	Responsiveness towards customers
	Communication with customers
	Understanding and delivering customer value
	Promotion and sales

Table 5: EMICO framework

Source: Jones & Rowley, 2009.

As popular scales for marketing activities are mainly based on quantitative research of large firms, these are unsuitable for the research of small firms. The EMICO framework was built by using existing measures or scales of entrepreneurial marketing, innovation, and customer and sales orientation literature and supported by findings from EM and SME literature as well as a case study (Jones & Rowley, 2009).

So far, only one study has used the EMICO framework to explain the marketing behavior of BGs but limited the scope of companies investigated to B2B companies from Poland (Kowalik & Danik, 2019). Kowalik and Danik found that the framework was well applicable to BGs, but that in the specific case of BGs some elements of the framework are in practice more important than others, with some having no relevance at all. A modified list of EMICO elements including their hierarchy in the context of BG marketing strategies was put together by the authors (Table 18). These are: As per the authors and their findings, the EMICO elements of *Exploiting markets* and *Integration of business processes* have minor importance for marketing activities of BGs. Regarding their research, the most important EMICO elements for BGs are *Networks and relationships*, *Propensity to innovate*, *Responsiveness towards customers* and *Communication to customers*. In the following chapters, the elements of the EMICO model will be the basis for

the analysis of this study. The objective is to find out which elements are being pursued by B2C BGs and which of those are most relevant to consumers.

In the realm of BGs, the EMICO framework has been used solely in a B2B context leaving little knowledge on its validity and applicability in a B2C BG context (Kowalik & Danik, 2019). This presents a problem because the research findings to date seem only relevant for B2B companies – however, also for B2C BGs, market entry processes are costly and risky. Thus, a framework giving guidance on which aspects of marketing B2C BGs should focus on could be of great support for the entrepreneurs. We expect differences in the hierarchy of elements of the EMICO model for B2B and B2C BGs, as these markets require a different approach to marketing, especially in the complexity of relationships with customers (Danik, 2020). In B2B companies the relationships between company and customer are long-term and characterized by strong interdependencies, for example in terms of technical and economic aspects. Communication between parties is two-way, allowing for the negotiation of custom-tailored offers. (Danik, 2020) Because of these differences in the relationship with customers, B2C and B2C companies have different needs in what their marketing should achieve. Therefore, results of the hierarchy of elements of the EMICO model created by Kowalik and Danik (2019) are not transferable to the full extent.

3. Research Process

The following chapter provides information on the research process, research model and the development of the hypotheses in accordance with current literature which was reviewed in chapter 2.

To address the elements of the EMICO framework in B2C BGs, this study involves a qualitative as well as a quantitative part. The sequence of steps can be seen in Figure 2.

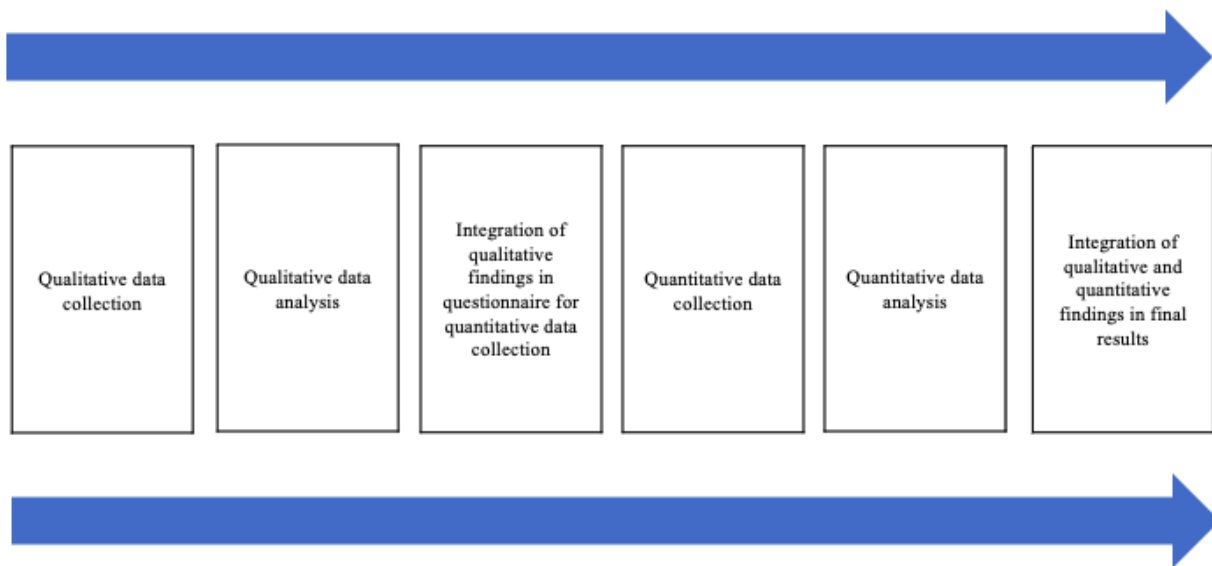


Figure 2: Research Sequence of this study

Source: Own elaboration.

In this study, the researched companies are e-scooter providers which offer their service in Vienna as of April 2019. E-Scooter companies pose a fitting example of BG companies: The first e-scooter companies were founded in Silicon Valley in 2017 and grew quickly. After initial firms showed international growth competitors from around the globe, especially Germany, France and Scandinavia, stepped into the micro-mobility business as well by offering e-scooters.

Comparing the marketing strategies of BG companies within one product category has to the best of knowledge of the author not be attempted in literature before: When comparing companies which offer the same kind of product, external factors such as differences in industry needs and variations in turbulences of the respective industry can be avoided. Thus, the decisions made to build a marketing strategy can be looked at based on internal firm factors only.

Furthermore, the two selected case companies pose a good example for comparison as one company is market leader in Europe, whilst the other one was since acquired by a US competitor and ceased operation. In interviews conducted with executives of the two case companies both stated their company goal to be the “winner” among intense competition. The acquired company specifically stated that being acquired was “not what any of us wanted when we first started” and further explained the acquisition rather as a logical step in an industry of strong competition. Thus, as one company is reaching its goals and the other failed in doing so, results can be compared against their relevance to a successful B2C BG marketing strategy.

By comparing the marketing strategies of the two companies, relevant insights are expected as the comparison might reveal information on which marketing strategies were pursued by the market leader which the acquired BG neglected. Furthermore, the marketing strategy of the successful BGs can be used as an example for an effective strategy. Conversely, the marketing strategy of the failed company can be used as an example for an ineffective strategy. This difference reveals information on what elements a B2C BG should pursue in order to expect success..

First, a qualitative research by interviewing decision makers from BG companies was conducted. The objective of the qualitative research was to test the qualitative EMICO framework on its application to B2C BGs. Furthermore, the qualitative study was conducted to determine which factor(s) of the model are pursued by B2C BGs.

The information gathered in the interviews was used to arrange the EMICO elements by their importance to B2C BG companies. Findings show that the elements most strongly pursued by the interviewed companies were *Speed to market*, *Market intelligence generation*, *Networks and relationships*, *Propensity to innovate*, *Responsiveness towards customers* as well as *Understanding and delivering customer value*. The greatest challenge for both companies interviewed was building brand loyalty.

In the second part of the study, a quantitative research was conducted. The objective of this research was to involve the consumers' perspective on what marketing elements in a BG brand is most relevant to them in regards to their brand loyalty. The quantitative study explored whether the EMICO elements most strongly pursued by B2C BGs as uncovered in study 1 correspond to the customers' perspective. This is a novel addition to existing literature as the assessment of BG marketing strategies in a B2C setting is conducted by including the companies' as well as the customers' perspective. By incorporating both perspectives, it is uncovered that discrepancies exist between the marketing strategies pursued by companies' and its customers' needs. This, in turn, should be of high importance to companies and their marketing alignment. The research model for study 2 analyses which influence marketing strategies corresponding to elements of the EMICO model have on brand loyalty. The study uncovers that brand communication stands out as the most important factor which influences brand loyalty. Especially brand uniqueness explains a large part of its variance. The overall study is concluded with a final collection of findings of both parts of the study. The Research Model is summarized in Figure 3.

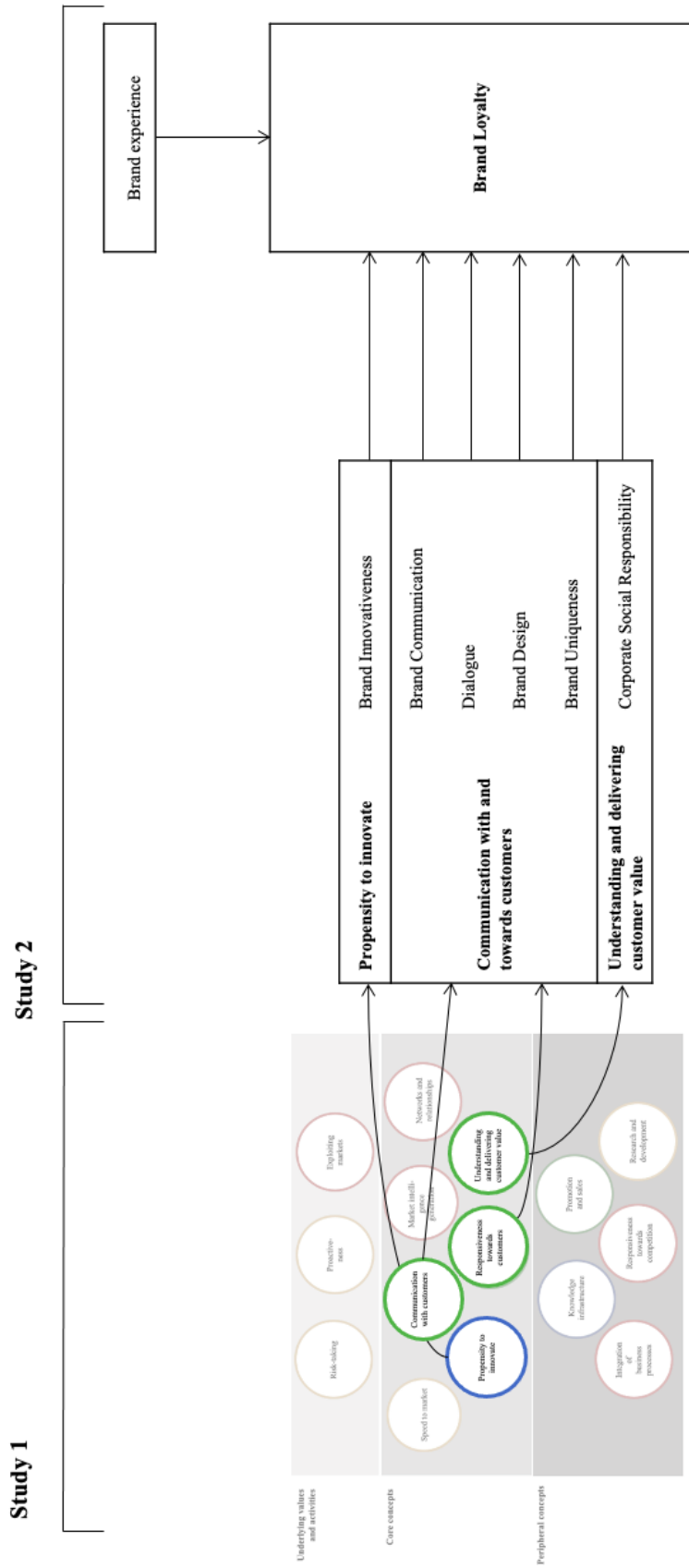


Figure 3: Research Model of this study

Source: Own elaboration.

4. Qualitative Research

As a first step, marketing strategies of two BG companies are compared. To do so, their marketing activities are entered into the EMICO model.

The EMICO model by Jones and Rowley (2009) shows the 15 most prominent elements of marketing strategies of SMEs. In a research by Kowalik and Danik (2019), the authors test whether the EMICO model can be applied to BG companies and find that the model is well fitted for this application. However, since their research is limited to B2B BGs from Central and Eastern European Countries, and since findings so far are only partially transferrable to B2C BGs, a modification to B2C BGs from industrialized countries seems required since. Nevertheless, for new companies in any business area, B2B as well as B2C, global expansion is costly and risky. It is expected that companies in these business areas – just as much as their customers – have different needs. In B2B markets for example, company-client-relationships are usually much closer. For example, the EMICO elements of *Responsiveness towards customers* and *Communication to customers* were pointed out as specifically important in the marketing strategy for B2B BGs by Kowalik and Danik (2019). This might be different for B2C companies as these firms are less able to directly communicate with each customer than B2B companies (Kowalik & Danik, 2019).

The objective of the comparison using the EMICO model is to visualize where the focal points of the marketing of each company investigated lie. The two companies are of the same industry of e-scooters and can both be defined as BG per the definition determined in chapter 2.1. They differ insofar as one of the two companies is the European market leader in e-scooters whereas the other one was recently acquired by a competitor and ceased operation. Comparison of the marketing elements pursued by each company delivers interesting insights: On the one hand it shows which marketing elements were neglected by the acquired BG. This might be an indicator for why the company ceased operation. The other insight the comparison raises is which marketing elements were pursued by the European market leader and neglected by the acquired BG. This difference gives information on what elements a B2C BG should pursue to increase likelihood of market success.

4.1 Methodology

In the following chapters, methodological approaches of the qualitative research are explained. After this, results are presented.

The qualitative study derives from structured interviews conducted with three senior marketing executives of B2C BGs. The questions incorporated in the interview directory were asked in the same order with each interviewee. All interviews were conducted via video call between April and July 2020.

Earlier research acknowledges the benefits of using qualitative methods in EM studies in order to address issues regarding ‘How’ and ‘Why’ issues (Gilmore, 2010). With this method, the interviewees are able to reflect about what happened in their company, why it did so and to uncover what went right or wrong (Woodside et al., 2005).

To identify possible case candidates to interview, the companies had to meet the following criteria: The firm had to meet the INV definition of Oviatt & McDougall (1994, p. 49). Also, the company had to generate at least 25% of sales outside its domestic market within three years of its foundation (Knight & Cavusgil, 2004; Zhou et al., 2010). Companies had to be e-scooter companies offering their shareable e-scooters in Vienna, Austria, as of April 2019. By this time, eight e-scooter companies offered their services in Vienna. Finally, the process led to the selection of two firms:

Company 1
<p>Company 1 was founded as <i>Flash</i> in 2018 by a former founder of a food delivery provider in Berlin (O’Hear, 2019a). In preparation for further international expansion, the company re-branded to a different brand name in June 2019. The company states that besides lightnings and comic book superheroes, consumers associate speed with the old brand name – an offering the brand did not want to be delivering as it takes the responsibility of moving people seriously. The new brand name on the other hand is associated with circles and connections. It plays with the image of working with others to help move people around in their city in a safe, enjoyable and reliable way (O’Hear, 2019b).</p> <p>By January 2019, about one year after the founding, the company had 50 full-time employees, many of them recruited from renowned, global companies. In the first four months after launch in its first city, Lisbon, the firm was present in 21 cities across seven countries and had accumulated 1 million rides. By November 2019, numbers rose to 10 million rides and 3 million registered customers worldwide with operations in more than 40 cities across Europe and in the United Arab Emirates (O’Hear, 2019c). In January 2020, the company was acquired by a US competitor and discontinued (O’Hear & Matney, 2020).</p>

Company 2

Company 2 was founded in 2018 in Berlin. It evolved into a fast-growing scooter provider despite only having a fraction of the capital available to its US competitors. After less than 12 months after launch, the company operated in 40 cities in 12 countries (Lunden, 2019). In January 2020, the company acquired a UK-based provider of mobility-related hardware and replaceable batteries (O’Hear, 2020). With another acquisition in February 2020, the company has since added rentable, free-floating mopeds to its service. By April 2020, the firm is present with its services in 54 cities in Europe and is European market leader (Korosec, 2020).

Of the two companies, one employee from company 1 and two employees from company 2 were interviewed. The two selected case companies present an interesting juxtaposition, as company 2 is market leader in Europe whilst company 1 terminated. Both companies stated their goal as a company to be the “winner” in intense competition. Company 1 specifically said that being acquired was “*not what any of us wanted when [they] first started*” and further explained the acquisition rather as a logical step in an industry of strong competition. Company 1 additionally struggled already shortly after their founding and was forced to change its name as its original name was associated too much with speed and thus raised security concerns within the consumers. Thus, as one company is reaching their goals and the other one failed in doing so, results can be compared against their relevance to a successful B2C BG marketing strategy. Primary data from these cases were collected through structured interviews (Table 6). The interviews were conducted in either English or German, depending on the native language of the person interviewed. The interview with case A from company 1 was held in English, the interviews in German. The interviews with cases B and C were conducted in German and later translated to English before being analyzed. The interviews took between 39 and 61 minutes and were each recorded and transcribed, resulting in 161 minutes of recordings and 15,014 words of interview transcriptions (Appendix A).

Case Number	Company	Position	Interview Duration	Method	Language	Length of Transcription
A	1	Global Head of Partnerships	61:31 Minutes	Structured Interview	English	7537 Words
B	2	Senior Growth and Marketing Manager	39:53 Minutes	Structured Interview	German	3286 Words
C	2	Growth Marketing Manager, Senior Manager International Marketing	60:00 Minutes	Structured Interview	German	4191 Words

Table 6: Interview Data

Source: Own elaboration.

To draw relevant findings from the interviews with the three decision makers of B2C BG companies, the interview transcripts were thoroughly analyzed by qualitative content analysis. This method of analysis can be used to analyze data based on an existing model (Miles & Huberman, 1994). The existing EMICO framework was used as the coding scheme. Particular statements of the persons interviewed were assigned to the matching dimension of EMICO (Appendix B). This procedure was repeated for each transcript. By conducting this form of content analysis, marketing strategies described by the person interviewed were matched with the framework. Results expose that more attention was given to some dimensions than others while others had only little meaning to the marketing strategy of the respective BG. The gathered statements allocated in the EMICO model can be found in the appendix. A comparison of results and the adopted EMICO models for each of the two companies are shown in the following chapter.

4.2 Results of the Qualitative Research

4.2.1 Application of the EMICO model to B2C BGs

In this chapter, the versions of the EMICO model, applied to the two companies investigated, are presented (Figure 4). For this study, the adapted EMICO model created by Kowalik and Danik (2019) is used as the basis. Their version incorporates the assignment of each of the 15 EMICO elements in one of three categories: *Underlying values and activities*, *Core concepts* or *Peripheral concepts*. *Underlying values and activities* enable the adoption of EM in the first place and are fundamental to the decision-making process of the company. *Core concepts* are central and important in the EM of BGs. *Peripheral concepts* are less important to EM in BGs (Kowalik & Danik, 2019).

Company 1



Company 2

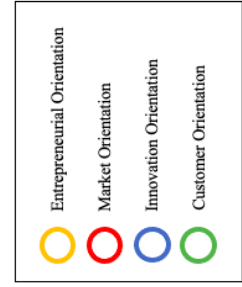


Figure 4: Application of the EMICO model to B2C BGs

Source: Own elaboration.

4.2.2 Comparison of the EMICO models for B2C BGs

In the following chapter, a comparison of the company-specific arrangement of the EMICO elements is conducted. Each orientation – EO, MO, IO, and CO – will be discussed in terms of the relevance of its elements to each company. Differences and similarities are shown and discussed.

4.2.2.1 Entrepreneurial Orientation

In the relevance of EO elements, no difference was observed between company 1 and company 2.

By definition, BGs take risks and seize opportunities with the purpose to expand as quickly as possible (e.g. Knight & Cavusgil, 2004). With only cursory calculation of risk, BGs and their entrepreneurs rely on their intuition or experience and make decisions as they go with little to no long-term planning:

“We tried lots of different things (...). We at some point tried just putting [the scooters] on the ground and it worked (...). [In allocating resources to our marketing activities] I don’t think there was any kind of scientific research towards this, it was more like ‘Let’s allocate a small portion of the budget towards this, as a hedge’”. – (Case A, company 1)

Experience of the team was described as follows:

“Everybody [working in the company] had experience in other tech companies and other start-ups so everybody was bringing experience to the table. We had a lot of people working in the food delivery industry previously and they had a very certain way of thinking about re-ordering and how people interact with apps and so on. But it doesn’t necessarily translate directly to the scooter world.” – (Case A, company 1)

Consequently, *Risk-taking* is treated as an *Underlying value* of a BGs marketing strategy.

Similarly, BGs are characterized by proactiveness as BGs are going global to exploit opportunities which they do not have in their home market (Rennie, 1993):

“[Company 2] is successful because with the smallest funding, [company 2] managed to gain acceptance in one of the toughest markets in Europe. And [company 2] managed to become prevalent in some of the core cities in Europe.” – (Case C, company 2)

In this study, standardization and adaption are also allocated to the element of *Proactiveness*. As these are requirements BGs need to fulfill it can be seen as an underlying activity.

Speed to market was pointed out as highly important by both companies. As these companies face strong competition in the market and so called “app fatigue” by the users, first-mover advantage in each geographical market before another provider is crucial:

“There is this idea that people aren’t going to have more than two or three scooter apps on their phone. So you have to be one of those two or three apps. (...) It really makes a difference if you’re one of the first mover, precisely for that reason that people have ‘app fatigue’.” – (Case A, company 1)

From a marketing perspective this can be seen in the need to find quick, agile and low-cost activities that can be implemented efficiently and in a timely manner:

“It’s about being the first ones, so you can win this market. (...) expansion is a race.” – (Case B, Company 2)

“In [different cities] we had to figure out the regulatory situation and then obviously put these [scooters] on the ground as quickly as possible.” – (Case A, company 1)

“You have to do as much as you can as fast as you can, (...) a crazy growth. So you can then emerge as one of [the] winners. The biggest one will get the most tenders from the cities. They will also get the most customers and they will also get the most partnerships which then becomes a self-reinforcing positive circle.” – (Case A, company 1)

As this impacts the marketing strategy strongly, *Speed to market* is allocated as a *Core concept* for both companies.

In both companies, *Research and development* is a *Peripheral concept*. Not many comments were made describing specific R&D activities, besides initial branding research and data analysis on the location of the products:

“We put the first scooters on the streets (...) but only as a trial in a few different markets. (...) What was put on them was ‘This is not a scooter’, just to test the technology and test how it works.” – (Case A, company 1)

Especially company 1 claimed that not being able to collect necessary data led to the conclusion to not invest in marketing activities as relevant data was either too time-consuming or too costly, or both:

“There was no real strategy because it all comes down to the fact that nobody really knew what worked and nobody had the data to back it up, so everything was a hypothesis and in that situation, you just hedge your bets.” – (Case A, company 1)

Company 2 as well did not focus on data-driven marketing but more on a “qualitative shift” in their marketing, focusing on communication and storytelling:

“In the beginning, our marketing was very performance-focused, very numbers-driven, data-based. When we moved away from the performance-based marketing to a more qualitatively based one (...). – (Case C, company 2)

4.2.2.2 Market Orientation

Regarding the attention elements of MO receive in the marketing of B2C BGs, slight differences are seen.

The dimension of *Exploiting markets* shows similar aspects to *Proactiveness*, since BGs penetrate markets where others cannot – or cannot yet. Thus, *Exploiting markets* is less an element of their respective marketing strategy but more what differs a BG from a regular SME. Consequently, this dimension can be seen as an underlying activity for both companies studied.

Networks and relationships were considered as highly relevant by the companies interviewed, thus is considered a core element. As this is a low-cost marketing strategy which exposes BGs to a relevant and new audience, it was named a useful strategy by both companies. Working with partners involves dedicating comparatively little time involvement or financial resources albeit simultaneously reaching new target groups and reaching legitimacy (Bangara et al., 2012).

“It’s about (...) working together with these cities directly in order to have a product that works as an addition to the public transport, not as a substitute.” – (Case B, company 2)

“It is part of the core and expansion strategy to try working with every public transport provider in every city. Public transport is really important for the reputation, it just sounds good when we say that we work together with the Wiener Linien. It’s part of a lobbying strategy, but then you have one enemy less when it comes to regulations (...).” – (Case C, company 2)

“You could either offer scooters to companies so that their employees can try them or try any other way to reduce the hurdle that people download the app and ride a scooter for the first time.” – (Case C, company 2)

“(...) A big part was getting as close to public transport as possible, (...) because of (...) the idea that you could really prove the ‘Last Mile Concept’. (...) Everybody was obsessed with signing partnerships with the public transport operators.” – (Case A, company 1)

“We focused on the security aspects more because partnerships with cities would be easier (...).” – (Case A, company 1)

The *Integration of business processes* is considered a big challenge in the internationalization of young companies as decentralized processes are linked with the loss of control (Cavusgil & Knight, 2015). From a marketing perspective, business processes are intertwined in the communication strategy of company 2, which led to relevant and unique brand content that was communicated to customers:

“The most important part in a communication strategy is that you involve all departments. All departments are connected with every single topic, with every issue. I (...) get together every day with every department and talk through every single project. Back at my team we look at the data, we look at the objectives, the strategy. And then we build stories around that.” – (Case C, company 2)

“(...) Most scooter companies had a very decentralized model (...). So you had central technology and central services but then you had local country managers and then each country manager had a group of city managers who were doing completely their own things. They were taking decisions and prioritizing things and launching initiatives and training and hiring in completely different ways.” – (Case A, company 1)

As the integration of business processes is not of high relevance to both companies interviewed, it is considered a peripheral element of a BG marketing strategy.

Market intelligence generation was treated differently by both companies interviewed. Company 1 worked on finding the right variables to gather relevant information on the geographical region they would expand to next.

“[When approaching international markets] we looked into lots of different variables on what might work. (...) There wasn't really any proven variable for what really works. Probably the closest thing is just ‘Does the city have disposable income?’” – (Case A, company 1)

“There was no real strategy because it all comes down to the fact that nobody really knew what worked and nobody had the data to back it up, so everything was a hypothesis and in that situation, you just hedge your bets.” – (Case A, company 1)

“I wish there would have been a more scientific way. But unfortunately, there was such a lack of clarity around ‘What's the ROI? Where would it make more sense?’. But there just wasn't a really structured decision-making process in marketing. The time to test hypotheses that you need in order to understand where that money is going and where it is useful was just lacking.” – (Case A, company 1)

As company 1 stated to not have a working strategy for decision making, *Market intelligence generation* is classified as a *Peripheral concept* for company 1.

Company 2 focused on obtaining a sentiment for the respective city, their inhabitants and the relevant business ecosystem.

“[A challenge is] finding the right initiatives, the right companies with which you could maybe work together. You really need to get to know the market and find the right people to do that.” – (Case C, company 2)

As in company 2 more thought was put into the buildup of market intelligence, it is treated as a core construct for company 2.

Also, the element *Responsiveness towards competition* received varying attention. Company 1 focused strongly on trying to keep up with competitors:

“Across the whole industry there was never really a lot of time spent on these [marketing] topics because everyone was trying to rush so fast (...) and most of what people did was just copying the competition and just try to keep up with the competition.” – (Case A, company 1)

“I think there was no real difference between the European scooter guys. I think everybody was doing the same things.” – (Case A, company 1)

“Very quickly in Europe [the marketing and communication of scooter companies] rotated around certain values (...). But everyone was doing the same thing, so I (...) don’t think anyone was being more innovative. Some did some kind of cool marketing stunts (...) but in general it was pretty aligned between everybody. (...) There was never a last thing advantage because everyone was copying everyone else.” – (Case A, company 1)

Company 2 on the other hand admitted to always having an eye on the competitors but also stated that creating unique stories and image was the top priority:

“Competitor analysis is always important. You shouldn’t take it too serious though and put it as the main focus.” – (Case C, company 2)

“In the beginning we compared our strategies to our competitors, later not so much anymore. (Since) my job was to tell the [company 2]-story and to make that interesting, I wasn’t inspired by the competitors as much. (...) I tried not to look too much at the competition so I wouldn’t be distracted too much but instead be able to focus on creating unique stories that underline the uniqueness of [company 2].” – (Case C, company 2)

Due to these differences, the element is allocated as a *Peripheral concept* for company 2 and a *Core concept* for company 1.

4.2.2.3 Innovation Orientation

Knowledge infrastructure can be considered a peripheral element of marketing strategies in both BGs. Jones et al., (2013) define the process as IT-based and structured. This does not seem an applicable strategy for BGs as it needs the dedication and care to collect external as well as internal data and to disseminate them within the relevant people in the company (Jones & Rowley, 2009). Thus, this element is considered as peripheral in both companies.

Propensity to innovate varies in the two companies under study. The element contains the innovation of a niche or new product or industry as well as the building of inimitable USPs while being resource-constrained (Jones & Rowley, 2009).

Company 1 emphasized that innovation was prevalent in the industry itself, but less so in its individual players.

“It was a group of companies and a group of people and an environment that was totally new. Trying to figure out – while going a hundred miles an hour – which strategy will work and how you can differentiate from the competition and whether or not it is even possible to differentiate yourself or if the customer even cares between the competition.” – (Case A, company 1)

“[Our unique selling points were] investing in vehicle design. Efficient operations. Sustainability, focusing on being green for the environment and using green charging and this kind of stuff.” – (Case A, company 1)

Company 2 has a clearer vision of innovation incorporated:

“We said ‘at [company 2], everything should evolve around creative.’ Our goal was that people, no matter whether it's one or 1000, if they saw something from [company 2], would be able to find it good looking, transparent, understandable, exciting. Via creative formats we tried to engage people in a qualitative shift (...). The only way of gaining relevance in my opinion is if you manage to start a meaningful dialogue. And that on the other hand is hard to measure (...). It just takes a little while until you realize the value of something that is not measurable. And from that point on, it worked for us.” – (Case C, company 2)

Thus, *Propensity to innovate* is treated as a *Core concept* for company 2 and a *Peripheral concept* in company 1.

4.2.2.4 Customer Orientation

CO is the area in which the biggest differences can be seen in the dedication to its elements between company 1 and company 2. Whilst three of four elements of CO are *Core concepts* in company 1, all four are merely attributed as *Peripheral concepts* in company 2.

Company 1 did not invest much in being responsive towards customers but rather focused on practical facts like their country of origin (COO), vehicle design, efficient operations and sustainable scooters as being important for consumers:

“Being European, (...), investing in vehicle design, efficient operations, (...) sustainability. All of these were important (...) for consumers.” – (Case A, company 1)

Company 2 on the other hand pointed out that their goal was to not create new users, but to focus more on loyal customers:

“The goal of the marketing strategy is not to generate new users but to create loyalty. Brand loyalty is way harder to create than a new user.” – (Case C, company 2)

“Scooters are being criticized quite a lot. (...) We didn’t expect people to engage in these topics as much as they did. So we tried to pick up this conversation instead of ignoring it. We built content around these topics and spread it and that worked really well.” – (Case C, company 2)

Responsiveness towards customers is thus treated as a *Core concept* for company 2 and a *peripheral* for company 1.

Company 1 interpreted *Communication with customers* in a way where communication is rather limited to generating awareness and a recognizable branding:

“ (...) you need the network effect, that people recognize the brand, use the brand, refer the brand, refer to friends.” – (Case A, company 1)

“You need a persistent brand which works across all countries and is quite recognizable.” – (Case A, company 1)

Company 2 on the other hand stated:

“(...) marketing for scooters is more a platform for communication, not to sell the product, but to reach a certain positioning and communicate a certain image. The branding topic was thus more important than the marketing itself.” – (Case C, company 2)

Thus, *Communication with customers* is treated as a *Core concept* for company 2 and a *Peripheral concept* for company 1.

Understanding and delivering customer value as well was treated differently by both companies. Company 1 admitted lacking capabilities in deciding what – and if any – amount of resources to invest in marketing:

“There are two camps (...): you have those who say: ‘We don’t need to spend any money on marketing because we can just put our scooters on the ground and they’re going to be their own marketing. The second camp is ‘That’s not enough. Consumers at some point are actually going to care which brand they’re using and (...) will go for one scooter over another.’ (...) That battle was never resolved.” – (Case A, company 1)

Generally, company 1 focused more on practical information delivery in their communication, for example safety issues:

“We focused on the security aspects more because (...) we thought that safety will become an increasing thing for users because at some point users might have an accident or know someone who’s had an accident and we don’t want that to be a bad reputation for our scooters.” – (Case A, company 1)

Company 2 as well incorporated functional aspects in their value delivery strategy by relying on their “operations excellence” and thus delivering quality in their products.

“At [company 2], all operations are being handled by professional employees who were trained for that specific job, who did the maintenance, break tests, etc. So there was a certain operations excellence, which was important to guarantee a certain level of quality.” – (Case C, company 2)

“What differentiated our marketing strategy from our competitors was also authenticity, a good customer service, and that everything that involves the customer offers a good customer experience. This good customer experience was also what we wanted to reflect in our marketing. Especially on LinkedIn for example we showed what is going on at [company 2] and what matters to us at the moment.” – (Case C, company 2)

Due to these results, *Understanding and delivering customer value* is allocated a *Core concept* at company 2 and a *Peripheral concept* at company 1.

In the companies interviewed, *Promotion and sales* mostly took place online. Both companies users physical vouchers and flyers but focused largely on online advertising in the app stores as well as on social media platforms.

“[Flyers] worked well to get people to sign up. It stopped working when the weather started to become bad and it also didn’t work to create loyal, returning customers.” – (Case C, company 2)

“Via in-app push notifications we can try to incentivize the consumers or to reactivate them and thus drive customer loyalty.” – (Case C, company 2)

“Marketing to reactivate users was quite effective. We would send out SMSs and push notifications and whatever offering free rides (...).” – (Case A, company 1)

Both companies did not focus on promotions and sales tools and activities as they did not provide efficient solutions to generate returning customer. Thus, the element is allocated as a *Peripheral concept* for both companies.

4.2.3 Summary of the Qualitative Results

In the following chapter, findings of the qualitative study are briefly summarized. A broad discussion of results is conducted in chapter 6.

In study 1, two B2C BG companies were interviewed on their marketing strategies. Company 1 was recently bought by a competitor and exited the market. Company 2, although offering a very similar product, is the current European market leader in the field. According to the information gathered in this process, the elements of the EMICO model were ranked for each company and the order of elements furthermore compared. Distinct differences could be seen between the marketing elements pursued by the market-leading and the acquired BG:

It was shown that Company 1 pays attention to merely three of the 15 elements. Furthermore, the Company does not pay attention towards elements from CO and IO. The aspects in focus stem from MO and EO only.

Company 2, in comparison, incorporates seven of the 15 elements into their marketing strategy. These seven elements stem from all four orientations: EO, MO, IO, and CO.

Of the 15 elements, both companies focus on *Speed to market* and *Networks and relationships. Communication with* and *Responsiveness towards customers* as well as *Understanding and delivering customer value* describe important values in the marketing of Company 2. Other important strategies pursued in the marketing of this company are *Propensity to innovate*, *Market intelligence generation*.

From study 1, two challenges became apparent which are further investigated in study 2: The first challenge both companies faced is the quest to differentiate from the competition. This task

is owed to the fact few functional differences exist between e-scooter providers. The respondents stated:

Trying to figure out – while going a hundred miles an hour – which strategy will work and how you can differentiate from the competition and whether or not it is even possible to differentiate yourself or if the customer even cares between the competition.” – (Case A, company 1)

“It’s too difficult to build up distinguishing features and customer value in hindsight through the app, the communication, through marketing.” – (Case B company 2)

“(…) You try and differentiate yourself from other brands. If a user downloaded a certain scooter app, this user will be using those exact scooters and no others because the scooters are placed in similar locations and in similar quantities. I would hope it would be because of brand loyalty.” – (Case C company 2)

The bespoke challenge of differentiating aspects is in line with the second challenge, the building of brand loyalty. Brand loyalty is considered one of the core aspects of brand equity (Porter, 1980).

“[The business is] mostly about this first ride and then try to establish rhythm in the customers’ behavior, by incentives, by trying to analyze the positioning of the scooters as detailed as possible to make it as easy as possible for the consumer to ride a scooter for the first time.” – (Case C, company 2)

“The goal of the marketing strategy is not to generate new users but to create loyalty. Brand loyalty is way harder to create than a new user. The measure of brand loyalty is user retention.” – (Case C, company 2)

“The biggest challenge is to stay unique with what you communicate. Stay relevant. And, to look at the bigger picture, to generate value. Generate actual customer value. It’s difficult because it’s a seasonal business and it’s characterized by hedonistic client behavior. The exciting thing about the scooter business is that you really have to try hard to get loyal customers.” – (Case C, company 2)

We raise enough awareness for the first contact just by putting the scooters on the right places in the city. So you don’t need to call as much attention to yourself anymore by saying ‘Here we are!’ , but rather by saying ‘What are we?’ or ‘Why us and not the competitor?’ or ‘Why again us?’” – (Case B, company 2)

Since the challenge for differentiation and brand loyalty is dependent on the consumers' behavior, these aspects are further studied in quantitative research.

5. Quantitative Research

As this study involves B2C companies, research is enriched with consumer data. By collecting data of consumers regarding their attitudes towards marketing activities of BG companies, managerial implications to these companies can be given especially well since the ranking incorporates both perspectives: the company's as well as the consumers'.

5.1 Hypotheses development

One topic the companies struggled with and which came out as especially distinct in the qualitative interviews was the urge to build brand loyalty. The companies had managed to define strategies to activate first-time-users in a short amount of time but building a loyal customer base was a struggle because product differences were small and both providers did not have a clear strategy how to achieve loyalty. The EMICO model proven to be more efficient in the context of B2C BGs assembled in study 1 was used as a base for study 1. Elements that correspond to the consumers' behavior, namely *Propensity to innovate*, *Communication with customers*, *Responsiveness towards customers* and *Understanding and delivering customer value*, were transferred to quantitative scales.

In the following, three approaches are discussed: building brand loyalty through brand innovativeness, brand communication, or customer value.

Consumers view innovative brands as capable of fulfilling their needs which drives the consumer's commitment to this brand (Eisingerich & Rubera, 2010). Besides this direct impact, innovativeness might also serve as a cue affecting the cognitive and emotional satisfaction of consumers, thereby influencing customer loyalty indirectly (Kunz et al., 2011). Henard and Dacin (2010) argue that brand innovativeness leads to higher consumer involvement and is thereby influencing customer loyalty. Henard and Dacin (2010) reveal that if consumers perceive a brand as innovative this influences perceived brand quality which in turn positively impacts brand loyalty.

Due to these versatile approaches in literature we suggest that:

H1: Brand innovativeness has a positive impact on brand loyalty.

Some authors argue that the brand is the key to integrated marketing (Schultz, 1998). A brand symbolizes the consumers' wants, needs and perceived value and thus, customers have ongoing relationships with brands. Brand communication helps to manage the brand's relationships with

customers, employees, media and the community (Zehir et al., 2011). Brand communication is especially important when launching a new product or service because the new concepts have to be made tangible (Terrill, 1992).

Brand communication pursues the goal to expose potential or existing consumers to a brand. Any exposure to a brand's messages affects the consumer's response (Schultz, 1998). By making the consumer more attached to the brand to strengthen the relationship, brand communication aims to enhance brand loyalty (Duncan & Moriarty, 1998).

Thus, the second hypothesis is:

H2: Brand communication has a positive impact on brand loyalty.

Gounaris et al. (2007) research the impact of customer-perceived value on brand loyalty through customer satisfaction. Customers are satisfied when receiving value from the products they buy (Oliver, 1981). When the customer's perceived value exceeds their individual expectations of the product or service they are satisfied (Anderson et al., 1994). Satisfied customers develop the willingness to repurchase a brand (McDougall & Levesque, 2000). Thus, the third hypothesis is:

H3: Customer Value has a positive impact on brand loyalty.

5.2 Methodology

The objective of the quantitative research is to find out which of the factors of brand innovativeness, brand communication, brand design, brand uniqueness and brand sustainability positively influences brand loyalty. In order to investigate this issue, two different statistical analyses were conducted.

In this survey, 250 consumers from Germany and Austria were asked their attitudes and opinions regarding marketing activities of Company 1 or Company 2. The questionnaire was built in Qualtrics and was then spread via Clickworker to a panel of interviewees. The questionnaire used can be found in Appendix C.

First, respondents were asked if any, and which of five named scooter brands they know. Five existing scooter brands were listed, two of them being Company 1 and Company 2. Only respondents who knew Company 1 or Company 2 were able to proceed to the questionnaire. The questionnaire was split in two parts, each part containing questions on either Company 1 or Company 2. Questions in the two parts were identical but related to Company 1 or Company 2,

respectively. Depending on which of the two brands they knew, respondents answered questions on the known brand. If they knew both brands, they were randomly assigned to one of the brands. As Company 2 was known by more respondents, 161 respondents answered the questions on Company 2. 89 respondents answered the questions on Company 1. This imbalance is also mentioned in this study's research limitations.

5.2.1 Sample Description

In total, 250 respondents answered the questionnaire (Table 7). 41.20% of respondents were women and 58.80% were men (Figure 7). The mean age of respondents was 34 years (Figure 8). More than half of the respondents had graduated from a university or college, a fifth completed an apprenticeship and a quarter had finished school (Figure 9).

N=250		Frequency	Percent
Sex	M	147	58,8
	F	103	41,2
Age Groups	18-24	48	19,2
	25-34	113	45,2
	35-44	49	19,6
	45-54	20	8,0
	55-65	20	8,0
Education	Comp. School	5	2,0
	Lower School	13	5,2
	Higher School	47	18,8
	Apprenticeship	55	22,0
	University	130	52,0
Brand	2	161	64,4
	1	89	35,6

Table 7: Respondents' data

Source: Own elaboration.

5.2.2 Preliminary Analysis

5.2.2.1 Validity and Reliability

The hypotheses formed in the previous section focus on several important measures: brand loyalty, brand innovativeness, brand communication, brand design, brand sustainability and brand uniqueness. Brand experience is used as a control variable. To test these items, multiple item scales were generated. These scales are the original or adapted versions of measurements which have been used and tested by previous researchers. In order to minimize the potential risk of errors, the scales were tested for their reliability and validity.

Reliability and validity are the most important preconditions for the quality of the data in order to keep measurement errors as low as possible. Reliability measures the internal consistency of scale items and how close scale items are related to each other as a group. Validity shows if a

scale measures what it is supposed to measure. A prerequisite for validity is reliability. Cronbach's Alpha, which is the measurement for reliability, evaluates the variance between items as well as the covariance between them. The values for Cronbach's Alpha range between 0 and 1. Values above .7 are acceptable, above .8 are considered to be good. (Duncan & Moriarty, 1998).

Table 8 shows the results of the analysis. the results indicate a good overall reliability as all values except one are above .7. The alpha-value of CSR is marginally below .7, which is an acceptable value for scales which consist of only two items.

The data set was confirmed as valid as it measures what it is supposed to measure and can thus be applied to a broader population.

Scale	Number of items	Cronbach's Alpha	Mean	St. Dev
Brand Loyalty	2	.802	2.796	.963
Brand Innovativeness	3	.775	3.403	.789
Brand Communication	5	.878	3.287	.777
Emotional Brand Design	5	.883	3.432	.878
Functional Brand Design	4	.817	3.730	.757
Brand Uniqueness	3	.910	2.913	1.040
Corporate Social Responsibility	2	.687	3.195	.847

Table 8: Cronbach's Alpha

Source: Own elaboration.

5.2.2.2 Scales

As mentioned before, the scales used are either the original or adapted versions of measurements which have been used and tested by previous researchers. Each question was answered with a 5 five point Likert-scale. In total, eight scales were used. In the following, the scales used in the study are presented.

The statements summarized for **brand loyalty** are (McMullan & Gilmore, 2003):

1. I consider myself to be loyal to [brand].
2. [Brand] would be my first choice.

The statements summarized for **brand innovativeness** are (Shams et al., 2015):

1. [Brand] provides effective solutions to my needs.
2. I can rely on [brand] to offer novel solutions relevant to me.
3. [Brand] is able to provide new solutions to customer needs.

The measure of brand communication in this study contains scales from brand communication as well as brand dialogue. This was so that the element of communication channel could be incorporated into the model.

The statements relevant for **brand communication** are (Azize et al., 2012):

1. I react favorably to the advertising and promotions of [brand].
2. I feel positive toward the advertising and promotions of [brand].
3. The advertising and promotions of [brand] are good.
4. [Brand] spends time to know its regular customer.
5. [Brand] creates a dialogue with its customers regularly.
6. [Brand] asks information from its regular customers about their satisfaction and happiness with the brand.

The statement relevant for **dialogue** is (Taghizadeh et al., 2016):

1. [Brand] uses diversified communication channels to have dialogue sessions with consumers.

The scale for **brand design** (Gilal et al., 2018) showed two different factors in the analysis (Figure). One half of the items addressed more emotional factors, the other half more functional ones. Thus, the items were split up in two measures: Emotional and functional brand design.

The statements relevant for **emotional brand design** are:

1. [Brand] looks stylish.
2. [Brand] looks beautiful.
3. [Brand]'s visual appearance attracts my attention.
4. [Brand]'s visual appearance is pleasing to me.
5. [Brand]'s visual appearance makes me think that [brand] expresses who I am as a person.

The statements for **functional brand design** are:

1. [Brand]'s visual appearance helps me identify the brand.
2. [Brand] seems to be highly user-friendly.
3. [Brand] seems to be safe to use.
4. [Brand] is comfortable to use.

The relevant statements for **brand uniqueness** are (Netemeyer et al., 2004):

1. [Brand] is distinct from other brands of e-scooters.
2. [Brand] really stands out from other brands of e-scooters.
3. [Brand] is unique from other brands of e-scooters.

For the measure of **brand sustainability**, a scale for **corporate social responsibility (CSR)** was used. The relevant statements are (Eisingerich & Rubera, 2010):

1. I consider [brand] as a socially responsible brand.
2. [Brand] is more beneficial to society's welfare than other brands.

In our model, brand experience is used as a control variable. The question for the measure of **brand experience** is:

1. How much experience do you have with [brand]?

5.3 Statistical Assumptions

In the first step, a partial correlation was conducted. The objective of the partial correlation was to see which of the independent variables of brand innovativeness, brand communication, brand design, brand sustainability and brand uniqueness correlates with brand loyalty. As we assumed that brand experience – indicator of familiarity with the respective brand – has an impact on brand loyalty, we calculated the partial correlation while controlling for brand experience.

In the second step, a linear regression was conducted. With the linear regression the objective was to see if one of the variables explains a significant amount of brand loyalty and if so, which of the variables and to which amount.

In order to conduct the statistical tests, several statistical assumptions had to be met. The description of tests for fulfilment of the assumptions follow in the next chapter.

5.3.1 Normality

One assumption that needs to be met in order to perform a partial correlation analysis and a linear regression analysis is normality. It describes whether our data is normally distributed. The skewness and kurtosis should both be between -2 and +2 for all variables. Furthermore, if the sample is large, normality is not an issue (Field, 2013). These numbers are met in all cases, thus normality can be assumed (Table 9).

		Statistics								
		BLOY	BEXP	BINNO	BCOMM	DIALO	BDES E	BDES F	BUNIQ	CSR
N	Valid	250	250	250	250	250	250	250	250	250
	Missing	0	0	0	0	0	0	0	0	0
Skewness		-0,269	.618	-.163	-0,191	-.271	-0,389	-0,259	-0,111	-0,431
Kurtosis		-0,081	-.182	.118	0,307	-.231	0,019	-0,302	-0,605	0,496

Table 9: Normality

Source: Own elaboration.

5.3.2 Linearity

The test for linearity was conducted by a visual examination of the data. The outcome of the linear relationship between all variables can be seen in Figure 10. Since there is a linear relationship between the variables, linearity can be assumed.

5.3.3 Multicollinearity

Since the model we are testing contains more than one predictor, the test for multicollinearity is relevant. It exists when two or more predictors perfectly correlate because then the regression model would have an infinite number of combinations of coefficients that would perform equally well. One possibility to check for multicollinearity is to look at the variance inflation factor (VIF) of the predictors. There is no reason for concern when the VIFs are below 10 and their average is not substantially higher than 1 (Field, 2013). The VIFs in our model are below 10 and the average VIF is 2.078 (Table 10). Another option is to look at the correlations between the independent variables. Here, any r value above .8 raises concerns. The highest r value in our case between one pair of independent variables is $r=.671$. Thus, we can assume that our data does not show multicollinearity.

Coefficients ^a				
Model		Collinearity Statistics		Average VIF
		Tolerance	VIF	
	BINNO	.551	1.814	2.078
	BCOMM	.343	2.913	
	DIALO	.836	1.196	
	BDES_E	.390	2.565	
	BDES_F	.503	1.988	
	BUNIQ	.441	2.270	
	CSR	.555	1.802	

a. Dependent Variable: BLOY

Table 10: Multicollinearity

Source: Own elaboration.

5.3.4 Autocorrelation

Autocorrelation exists when residual terms like errors or deviations between two adjacent observations are correlated. It can be detected with the Durbin-Watson Test, which tests for serial correlations between errors. A value of about 2 is good, values outside 1 to 3 indicate problems of autocorrelation (Field, 2013). The value of the Durbin-Watson Test of our model is 1.96 (Table 11). Thus, Autocorrelation must not be assumed.

Model Summary ^b					
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Durbin-Watson
1	,609a	0,371	0,353	0,773736	1,96
a Predictors: (Constant), CSR, DIALO, BDES_F, BINNO, BUNIQ, BDES_E, BCOMM					
b Dependent Variable: BLOY					

Table 11: Autocorrelation

Source: Own elaboration.

5.3.5 Homoscedasticity

If the variances of the errors are unequal across the levels of the predictor variables or follow some clear pattern, homoscedasticity must not be assumed. In Figure 11 we can see that the dots do not follow a pattern but are instead evenly dispersed around the line and around zero. Thus, we can assume homoscedasticity in our data.

5.4 Results of the Quantitative Research

In the following chapter analysis and results of the data collected is presented. A partial correlation analysis was conducted to determine the relationship between brand innovativeness, brand communication, brand design, brand uniqueness, brand sustainability and brand loyalty. Brand experience was used as a control variable. This way, the effect brand experience might have on brand loyalty can be partialled out.

A partial correlation analysis assesses to which amount two variables are related. It explores whether, as one variable increases, a second variable increases, decreases or stays the same, while controlling for the effect of a third variable. The variables can be related regarding direction and dispersion. As the assumptions were met, Pearson's r was used as a correlation coefficient. If the coefficient is positive, the two variables move in the same direction. If it is negative, they move in opposite directions. It varies between -1 and +1. The size of the effect is considered small, if r is around .1. An r value of around .3 explains a medium effect and around .5 a large effect (Field, 2013).

In a second step, a linear regression analysis was conducted to find out how large the effect of each independent variable is on brand loyalty. All variables were tested for their contribution to brand loyalty. The results were interpreted on the basis of the change of the coefficients (R^2) in the model summary.

5.4.1 Partial Correlation Analysis

The Partial Correlation Analysis was conducted to explore the relationships of the independent variables on brand loyalty (N=250). Namely, if as one of the independent variables rises, brand loyalty rises and to which extent. The relationships between brand innovativeness and brand loyalty, brand communication and brand loyalty, brand design and brand loyalty, brand sustainability and brand loyalty, as well as brand uniqueness and brand loyalty were investigated. For the Partial Correlation, all data collected was used and not split up in two datasets corresponding to each of the two brands under study.

Since brand experience is used as a control variable, we partial out the effect brand experience might have on brand loyalty. The results are summarized in Table 12.

Correlations			
Control Variables			BLOY
BEXP	BLOY	Correlation	1
		Significance (2-tailed)	.
		df	0
BINNO		Correlation	.374
		Significance (2-tailed)	.000
		df	247
BCOMM		Correlation	.426
		Significance (2-tailed)	.000
		df	247
DIALO		Correlation	.102
		Significance (2-tailed)	.110
		df	247
BDES_E		Correlation	.328
		Significance (2-tailed)	.000
		df	247
BDES_F		Correlation	.266
		Significance (2-tailed)	.000
		df	247
BUNIQ		Correlation	.493
		Significance (2-tailed)	.000
		df	247
CSR		Correlation	.465
		Significance (2-tailed)	.000
		df	247

Table 12: Partial Correlation Analysis

Source: Own elaboration.

Brand innovativeness (M=3.420, SD=.762) showed a moderate, positive, statistically significant correlation with brand loyalty (M=2.802, SD=.962), controlling for brand experience, $r(247)=.374$, $p=.000$.

Brand communication is explained by the scales of brand communication and dialogue. There is a moderate to large, positive and statistically significant correlation between brand communication (M=3.302, SD=.753) and brand loyalty, controlling for brand experience, $r(247)=.437$, $p=.000$. Between dialogue (M=3.528, SD=.919) and brand loyalty, there is a small, positive, non-statistically significant correlation, controlling for brand experience, $r(247)=.102$, $p=.110$. In terms of brand design, two characteristics of the scale were taken into account, emotional brand design and functional brand design. Emotional brand design (M=3.456, SD=.853) showed a moderate, positive, statistically significant correlation with brand loyalty, controlling for brand experience, $r(247)=.328$, $p=.000$. Functional brand design (M=3.757, SD=.715) showed a small to moderate, positive, statistically significant correlation with brand loyalty, controlling for brand experience, $r(247)=.266$, $p=.000$.

There is a large, positive and statistically significant correlation between brand uniqueness (M=2.933, SD=1.028) and brand loyalty, controlling for brand experience, $r(247)=.493$, $p=.000$.

Brand sustainability was measured by the scale of corporate social responsibility. Corporate social responsibility (M=3.212, SD=.829) showed a large, positive, statistically significant correlation with brand loyalty, controlling for brand experience, $r(247)=.465$, $p=.000$.

5.4.2 Linear Regression Analysis

Further, a linear regression was conducted to see whether any of the independent variables contributes to brand loyalty, and if so, whether they significantly contribute to it and to which extent. Therefore, all variables were tested for their contribution to brand loyalty. The results were interpreted on the basis of the change of the coefficients (R^2) in the model summary.

In a first step, brand loyalty was set as a dependent variable. All other variables were added to the model at the same time. In a second step, the variables were added to the model in a stepwise approach to see which variables are responsible for the largest amount in brand loyalty. Regression analysis is used to predict the value of a dependent variable of another one or more independent variables (Field, 2013). The coefficient R^2 is the proportion of the explained variance. For example, in case of an R^2 of 50%, half of the variance in the model is explained by the regression. This procedure was conducted for both brands separately, Company 1 and Company

2. By running the analysis for both brands individually, it is possible to compare results and draw conclusions on the behavior of each brand.

Company 1

When all variables were added to the model at the same time, 50.70% of the model could be explained by the variables. The model is statistically significant ($p=.000$, Table 13).

Model Summary				
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	,712 ^a	0,507	0,465	0,791221
a Predictors: (Constant), CSR, BDES_F, DIALO, BUNIQ, BINNO, BDES_E, BCOMM				

ANOVA ^a						
Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	52,821	7	7,546	12,053	,000 ^b
	Residual	51,335	82	0,626		
	Total	104,156	89			
a Dependent Variable: BLOY						
b Predictors: (Constant), CSR, BDES_F, DIALO, BUNIQ, BINNO, BDES_E, BCOMM						

Coefficients ^a						
Model		Unstandardized Coefficients	Std. Error	Standardized Coefficients	t	Sig.
		B		Beta		
1	(Constant)	0,06	0,501		0,121	0,904
	BINNO	-0,021	0,167	-0,016	-0,123	0,902
	BCOMM	0,154	0,193	0,119	0,795	0,429
	DIALO	0,067	0,123	0,052	0,545	0,587
	BDES_E	-0,044	0,168	-0,036	-0,26	0,795
	BDES_F	-0,043	0,181	-0,03	-0,239	0,811
	BUNIQ	0,352	0,112	0,378	3,132	0,002
	CSR	0,387	0,14	0,33	2,772	0,007
a Dependent Variable: BLOY						

Table 13: Linear Regression Analysis: Company 1

Source: Own elaboration.

In the next step, the variables were added stepwise into the model. By this procedure, the most relevant variables regarding their impact on the dependent variable become visible and variables that are non-significant are being selected out.

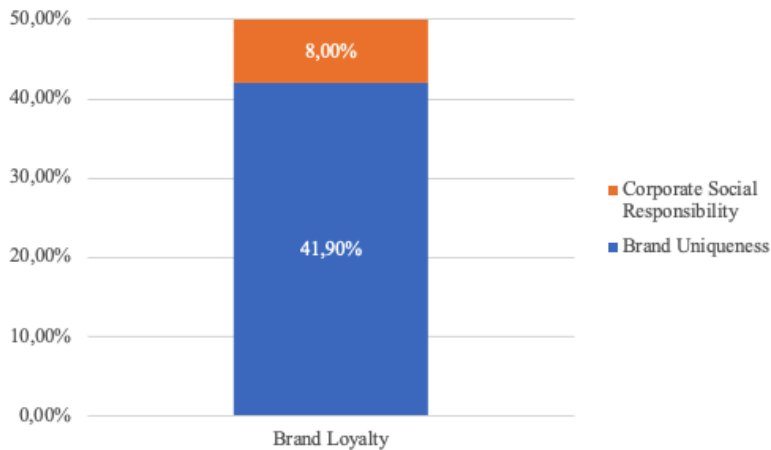


Figure 5: Brand Loyalty in Company 1

Source: Own elaboration.

Regarding the brand loyalty in Company 1 (Figure 5), 41.10% of it is explained by brand uniqueness. Another 8.00% are explained by CSR. Together, they explain 49.90% of the variance in brand loyalty. The model is statistically significant ($p=.000$).

Model Summary									
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Change Statistics				
					R Square Change	F Change	df1	df2	Sig. F Change
1	,647 ^a	0,419	0,412	0,829411	0,419	63,406	1	88	0
2	,707 ^b	0,499	0,488	0,774298	0,08	13,973	1	87	0

a Predictors: (Constant), BUNIQ
b Predictors: (Constant), BUNIQ, CSR

ANOVA ^a						
Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	43,618	1	43,618	63,406	,000 ^b
	Residual	60,537	88	0,688		
	Total	104,156	89			
2	Regression	51,996	2	25,998	43,363	,000 ^c
	Residual	52,16	87	0,6		
	Total	104,156	89			

a Dependent Variable: BLOY
b Predictors: (Constant), BUNIQ
c Predictors: (Constant), BUNIQ, CSR

Coefficients ^a						
Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error			
1	(Constant)	0,896	0,234		3,833	0,000
	BUNIQ	0,603	0,076	0,647	7,963	0,000
2	(Constant)	0,169	0,292		0,58	0,564
	BUNIQ	0,392	0,091	0,42	4,324	0,000
	CSR	0,426	0,114	0,363	3,738	0,000

a Dependent Variable: BLOY

Table 14: Linear Regression Analysis: Company 1, Stepwise Approach

Source: Own elaboration.

For Company 1 we can accept H2: Brand communication has a positive impact on brand loyalty, and H3: Customer Value has a positive impact on brand loyalty. We cannot accept H1 as the results showed no significant impact of Innovativeness on brand loyalty.

Company 2

The same procedure was repeated for Company 2. First, all variables were entered into the model at the same time (Table 14). This way, 31.20% of the model could be explained by the independent variables. The model was statistically significant ($p=.000$). Interestingly, the coefficient of dialogue was negative. This means that the measure of dialogue has a negative impact on brand loyalty.

Model Summary ^b				
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.558 ^a	0,312	0,28	0,742386

a Predictors: (Constant), CSR, DIALO, BDES_E, BINNO, BDES_F, BUNIQ, BCOMM
b Dependent Variable: BLOY

ANOVA ^a						
Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	37,976	7	5,425	9,843	.000 ^b
	Residual	83,773	152	0,551		
	Total	121,748	159			

a Dependent Variable: BLOY
b Predictors: (Constant), CSR, DIALO, BDES_E, BINNO, BDES_F, BUNIQ, BCOMM

Coefficients ^a						
Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	1,039	0,396		2,622	0,01
	BINNO	0,093	0,102	0,078	0,916	0,361
	BCOMM	0,241	0,135	0,194	1,785	0,076
	DIALO	-0,209	0,066	-0,227	-3,148	0,002
	BDES_E	-0,076	0,113	-0,073	-0,673	0,502
	BDES_F	0,165	0,119	0,131	1,385	0,168
	BUNIQ	0,266	0,093	0,288	2,85	0,005
	CSR	0,11	0,1	0,097	1,102	0,272

a Dependent Variable: BLOY

Table 15: Linear Regression Analysis: Company 2

Source: Own elaboration.

In the next step, the variables were added stepwise into the model (Table 15). By this procedure, the most relevant variables regarding their impact on the dependent variable become visible.

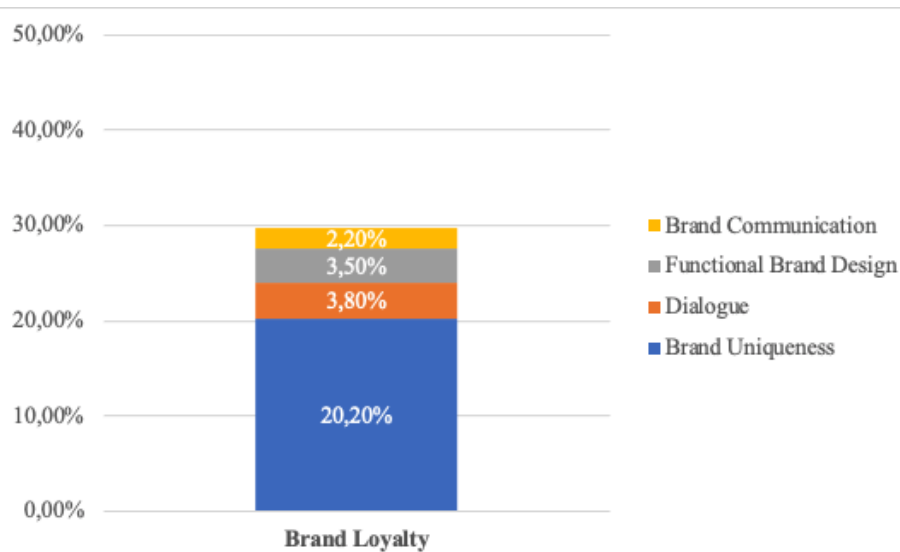


Figure 6: Brand Loyalty in Company 2

Source: Own elaboration.

For Company 2, brand uniqueness, dialogue, functional brand design and brand communication were the significant factors and thus were added to the model (Table 16). The model is statistically significant ($p=.000$).

Brand uniqueness explains 20.20% of the variance of brand loyalty in Company 2 (Figure 6). 3.80% are explained by dialogue, 3.50% by functional brand design and 2.20% by brand communication. Together, they explain 29.70% of the model.

Model Summary ^e										
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Change Statistics					
					R Square Change	F Change	df1	df2	Sig. F Change	
1	,450 ^a	0,202	0,197	0,784111	0,202	40,02	1	158	0	
2	,487 ^b	0,237	0,227	0,769324	0,035	7,132	1	157	0,008	
3	,525 ^c	0,275	0,261	0,752102	0,038	8,272	1	156	0,005	
4	,545 ^d	0,298	0,279	0,74281	0,022	4,927	1	155	0,028	
a Predictors: (Constant), BUNIQ										
b Predictors: (Constant), BUNIQ, BDES_F										
c Predictors: (Constant), BUNIQ, BDES_F, DIALO										
d Predictors: (Constant), BUNIQ, BDES_F, DIALO, BCOMM										
e Dependent Variable: BLOY										

ANOVA ^a						
Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	24,605	1	24,605	40,02	,000 ^b
	Residual	97,143	158	0,615		
	Total	121,748	159			
2	Regression	28,827	2	14,413	24,353	,000 ^c
	Residual	92,922	157	0,592		
	Total	121,748	159			
3	Regression	33,506	3	11,169	19,745	,000 ^d
	Residual	88,243	156	0,566		
	Total	121,748	159			
4	Regression	36,225	4	9,056	16,413	,000 ^e
	Residual	85,524	155	0,552		
	Total	121,748	159			
a Dependent Variable: BLOY						
b Predictors: (Constant), BUNIQ						
c Predictors: (Constant), BUNIQ, BDES_F						
d Predictors: (Constant), BUNIQ, BDES_F, DIALO						
e Predictors: (Constant), BUNIQ, BDES_F, DIALO, BCOMM						

Coefficients ^a						
Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	1,668	0,205		8,148	0,000
	BUNIQ	0,415	0,066	0,45	6,326	0,000
2	(Constant)	0,948	0,336		2,817	0,005
	BUNIQ	0,329	0,072	0,356	4,573	0,000
	BDES_F	0,263	0,098	0,208	2,671	0,008
3	(Constant)	1,408	0,366		3,85	0,000
	BUNIQ	0,371	0,072	0,402	5,161	0,000
	BDES_F	0,289	0,097	0,229	2,987	0,003
	DIALO	-0,188	0,065	-0,204	-2,876	0,005
4	(Constant)	1,245	0,369		3,378	0,001
	BUNIQ	0,285	0,081	0,308	3,517	0,001
	BDES_F	0,189	0,105	0,15	1,792	0,075
	DIALO	-0,216	0,066	-0,234	-3,279	0,001
	BCOMM	0,27	0,122	0,217	2,22	0,028
a Dependent Variable: BLOY						

Table 16: Linear Regression Analysis: Company 2, Stepwise Approach

Source: Own elaboration.

For the case of Company 2, we can accept H2: Brand communication has a positive impact on brand loyalty. We cannot accept H1 and H3 as our results did not show a positive impact of brand innovativeness and Customer Value on brand loyalty.

6. Discussion

The research objective of this study was to compare the marketing strategies of two B2C BGs – one successful, one unsuccessful – on the basis of the EMICO model. This was achieved with a qualitative study. In a following quantitative study, those elements of the EMICO model having an impact on customers in regard to brand loyalty were specified.

The qualitative study was conducted to visualize the focal points of the marketing strategy of B2C BGs. The two companies studied are suitable for an interesting juxtaposition: they originate from the same business of e-scooters, however, company 1 was recently acquired by a competitor and has discontinued operation, whilst company 2 emerged as the European market

leader in the field. For each company, the 15 marketing elements incorporated in the EMICO model (Jones & Rowley, 2009) were allocated into the categories *Underlying values and activities*, *core concepts* and *Peripheral concepts* according to the attention they received in the respective company. The procedure of thereby constructing a hierarchy of EMICO elements was before introduced by Kowalik and Danik (2019).

The results provide interesting insights as distinct differences can be seen between the marketing elements pursued by the leading as well as by the acquired BG.

From the 15 marketing elements defined by Jones & Rowley (2009) which form the EMICO model, nine were identified as *Peripheral concepts* in company 1. In the same category, only five elements can be found in company 2. It should be stressed that all elements of CO were allocated as peripheral in company 1. This indicates that CO was neglected in company 1.

Besides eventually missing customers' needs and expectations (Suardhika & Suryani, 2016), possible losses connected with the neglect of CO are long-term-relationships with consumers (Westerlund & Leminen, 2018), customer loyalty (Raju et al., 2011) and brand value (Fink et al., 2020). Since BGs are rather small and resource-poor, focus on better addressing their customers' needs can enable them to gain market share and reduce a possible negative impact of competition (Knight & Cavusgil, 2004).

A similar observation applies to IO: both elements from IO are focused on only peripherally in company 1. The respondent from company 1 confirms this with the following statement:

“(...) *There wasn't a big focus on the right KPIs because it was mostly about pure numbers of rides and growth and revenue run rates.*” – (Case A, company 1)

Neglecting IO describes that in company 1, there was no focus on creating new ideas, products or processes (Muthusamy, 2009). Companies that do not engage in IO activities usually lack creativity helpful for dealing with dynamic changes in the business environment (Schumpeter, 1942). Furthermore, from a consumer's perspective, perceived innovativeness of a firm leads to loyalty via two routes: A functional-cognitive and an affective-experiential one (Kunz et al., 2011).

Instead of CO and IO, company 1 focused on MO and EO: two elements of MO – *Responsiveness towards competition* and *Networks and relationships* – were *Core concepts* of the firm's marketing. *Exploiting markets* built an *Underlying value*. The only other element coined as a *Core concept* for company 1 was *Speed to market*. These findings underline the behavior of the firm revolving around its external environment and gaining competitive advantage (Yadav & Bansal, 2020).

The *Core concepts* of company 2 are more diverse: In a total of seven elements, one derives from EO (*Speed to market*), one from IO (*Propensity to innovate*), two from MO (*Market intelligence generation* as well as *Networks and relationships*), and three from CO (*Communication with customers*, *Responsiveness towards customers* and *Understanding and delivering customer value*).

The comparison of the companies' marketing strategies by means of the EMICO model has revealed various insights: As per the results uncovered, it can be seen that a diverse allocation of attention towards each of the four orientations seems likely to be more successful than to limit the focus. These findings are corresponding with those of Kocak and Abimbola (2009) who found that EO, MO, IO and CO are all main sources of success.

Both companies under study focus similarly on elements of MO and EO. The more successful company 2 additionally paid attention to elements of CO and IO which leads to concluding that these aspects are not to be neglected in a B2C BG and could potentially explain a part of the difference in the success of the two companies.

In addition to these findings, the neglect of CO in Company 1 could initiate discussions about the companies' long-term strategy. The company focused mostly on short-term planning and survival for the time being. Long-term strategies regarding brand differentiation or building brand loyalty were not thoroughly approached. In this light, further research might look into the antecedents for a BG's acquisition by a competitor. From the findings of this study, it might be assumed that following factors positively influence likelihood of later acquisition: a) neglect of IO and CO, b) lack of long-term planning , c) lack of commitment of the entrepreneur for the company.

As this research examines B2C companies, the qualitative results were enriched by consumer data. The objective was to incorporate the consumers' point of view and to specify elements of a marketing strategy that are relevant to the customer's choice of brand. To achieve this objective, 250 consumers were asked for their opinion on different aspects of e-scooter marketing. Here, the research model for study 2 considered results gained in study 1. The elements of the EMICO model determined as core elements of the successful BG's marketing were tested for their relevance to consumers. Study 1 showed that in the marketing strategy of a successful B2C BGs, brand innovativeness, brand communication, brand design and brand sustainability gain most attention. The goal most difficult to achieve for the BGs studied was the building of brand loyalty. Hence, study 2 investigates the impact brand innovativeness, brand communication, brand design, brand sustainability and brand uniqueness have on brand loyalty in a B2C BG context.

Results showed that discrepancies exist between marketing strategies pursued by companies and its customers' needs. Conclusion is that companies in a highly competitive market such as the one under study should have their differentiation efforts at the center of their marketing activities in order to build brand uniqueness. Of the elements tested, results showed that brand uniqueness has the largest impact on brand loyalty in B2C BGs. This means that of the elements tested, no other element has a stronger impact on brand loyalty than brand uniqueness. Consumers are more likely to stay loyal to the brand when they perceive it as unique. Thus, if the companies under study want to reach brand loyalty, they should focus on communicating brand uniqueness to the customers.

Besides brand uniqueness, which explained 41.90% of brand loyalty, corporate social responsibility had a significant impact on brand loyalty for Company 1, explaining 8.00% of its variance.

In Company 2, besides brand uniqueness (20.20%), 3.80% of the model could be explained by dialogue, 3.50% by functional brand design, and 2.20% by brand communication.

It can be clearly seen that there are differences between variables with a positive impact on brand loyalty in both of the brands.

Brand uniqueness explains a higher variance of brand loyalty in Company 1 than in Company 2. This might be the case because Company 2 had a more diversified marketing strategy, therefore consumer loyalty based on more aspects. Company 1 had generally less cues consumers could build associations with and which could furthermore impact their attitude towards the uniqueness of the brand. Although brand uniqueness is fairly high for both brands, it is higher in Company 2 ($M=2.972$) than it is in Company 1 ($M=2.862$). This shows that consumers feel that Company 2 is more distinct from other brands of e-scooters, stands out more from other brands of e-scooters and is unique when compared to other brands of e-scooters.

Company 2 shows strong skills in brand communication. All brand communication factors, besides emotional brand design, explain a significant amount of the variance in brand loyalty of the brand. This proves the correct focus of their marketing strategy as Company 2 recently stepped away from strongly performance-led marketing, but instead built a *growth team* responsible for "*meaningful conversations with consumers*". This qualitative shift includes strong engagement with customers on social media and engaging in conversations not only on Company 2 itself but on broader topics relating to mobility in cities, sustainability by mobility and the sharing economy as well as critical topics such as the durability of the e-scooters. For example, Company 2 started a campaign on LinkedIn where they would explain misconceptions about e-scooters and refute them with data and research.

A large focus of Company 2 is their storytelling. Their marketing team strongly focuses on “*telling the Company 2 story*” and pointing out what makes Company 2 a unique brand. Company 2 also launched online talks and panels on their social media channels to spark conversations amongst and with their customers.

The reason for Company 2’s “*qualitative shift*” is multifaceted. On one hand, Company 2 used its resources more on the qualitative engagement of users and less on generating a large number of new users. But also they pointed out that quantitative marketing was too limiting and too expensive for them. In the interviews they describe the tools of a “*classical ABC of performance marketing*” as limited and expensive. Company 2 had learned from prior experiences where large monetary resources had been put in classical marketing approaches and which had in turn been too expensive for the eventual outcome and thus decided to change the strategy. The positive impact marketing communication has on brands is in line with findings from literature. Marketing communication can be used to convince customers of a positive perception of a brand, thus building a differentiated brand image and awareness (Murray et al., 2011). Brand communication can be used to communicate functional aspects of a brand which solve or avoid consumers’ problems or spread messages regarding the external advantages of the brand, thus meeting consumers’ inner needs (Chinomona, 2016). The author further concludes that a higher level of brand communication corresponds with a higher perceived level of brand image. Brand communication impacts brand loyalty through brand image, maybe because customers are likely to be loyal to a brand with a good image (Chiou & Droge, 2006).

The factor *dialogue* correlates negatively with brand loyalty in Company 2. This means that as *dialogue* decreases, brand loyalty increases. According to the scale used to measure *dialogue* it can be advised that companies should not use diversified communication channels for their messages and interaction with customers, but to use a narrow, targeted selection.

Company 1 on the other hand only taps into one factor of brand communication, brand uniqueness. Company 1’s customers are loyal to the brand if the brand is unique. Company 1 generally did not allocate large resources to marketing because speed-to-market did not allow spending time on building a clear strategy. Furthermore, marketing had not established whether differentiation from the competition was a factor relevant for users. Thus, Company 1 stated that most of what their marketing consisted of was “*copying the competition and trying to keep up with the competition*”. Consequently this does not allow for any positioning of the brand’s uniqueness.

Efforts regarding their communication of CSR show their effect for Company 1: 8% of consumers’ loyalty in Company 1 can be explained by CSR. Company 1 describes sustainability

as their USP, focusing on efficient operations and green charging. This, they stated, would be important for consumers as well as for partnerships such as with cities or private companies. It can be assumed that consumers might have built associations of the brand through their CSR efforts which could have positively impacted uniqueness and brand loyalty. This finding coincides with previous research (He & Lai, 2014) which reveals that consumers' perceived CSR efforts of brands may improve consumers' brand loyalty. The authors further specify that these efforts enhance the brand's image differently: If a brand behaves in terms of its legal responsibilities this enhances consumers' functional image of the brand. If the brand participates in ethically responsible actions this increases the firm's symbolic image in the mind of the consumer (He & Lai, 2014).

Differentiation Strategy

The results gathered in study 2 show that companies must build up differentiating aspects to establish association of uniqueness in consumers' minds. The issue these companies face is that the market is highly competitive with only small product differences. Companies must establish uniqueness through differentiation so that the customer can build a preference for one brand over the other. The findings this study reveals show that B2C BGs in crowded markets focus on product differentiation while highly neglecting efforts of marketing differentiation.

Findings of this study reveal that for BGs, in crowded B2C market conditions BGs' focus on product differentiation leads to lacking brand loyalty.

Porter (1980) distinguishes between three business strategies: differentiation, cost leadership, and focus. Differentiation aims to create products or services that are perceived as unique by customers (He & Lai, 2014). Differentiation can mainly either be achieved by product innovation or intensive marketing and image management (Miller, 1988).

Research has shown that BGs usually follow a product differentiation strategy (Rennie, 1993; Knight & Cavusgil, 2004; Rennie, 1993; Altshuler & Tarnovskaya, 2010): With this strategy, companies target a niche audience with highly differentiated products, meeting particular customer needs and thus build brand loyalty. BGs sell innovative products based on new technologies (Hartsfield et al., 2008). Product differentiation strategy is the offering of products perceived as unique (Knight et al., 2004). It creates customer loyalty with meeting particular customer needs that distinguishes the offering from the competition (e.g. Porter, 1980). In most literature addressing BG branding it is found that BGs tend to differentiate via product differentiation by leveraging new technologies (Knight et al., 2004). Knight et al. (2004) point out

that differentiation is one of the key factors for the international success of BGs. A differentiation strategy based on product innovation strives to create “(...) *the most up-to-date and attractive products by leading competitors in quality, efficiency, design innovations, or style*” (Miller, 1988, p. 283).

Differentiation by marketing on the other hand “...*creates a unique image for a product through marketing practices*” (Miller, 1988, p. 283). The author continues to explain that to create a unique image for a product, marketing differentiation can be attempted through advertising, prestige pricing, or market segmentation. For this strategy to be successful, managers need a good understanding of competing products and customer preferences. One of the goals of marketing differentiation is to inspire brand loyalty (Porter, 1980). Marketing differentiation is less costly than other forms of differentiation like innovation or pricing and thus can be especially economical and useful in unpredictable environments (Miller, 1988; Porter, 1980). Fewer and less complex changes in the product line and in structure are necessary when following a marketing differentiation strategy. On top, alterations in marketing can be easily reversed if they fail to succeed and do not need the expertise of only a small team (Miller, 1988). Established literature points out that differentiation by marketing is typically necessary in uncertain and dynamic environments (Porter, 1980). Although innovative differentiation also does best in uncertain environments, marketing differentiation is the strategy that, at the same time, can create brand loyalty (Miller, 1988).

These findings from previous research should affirm B2C BGs in competitive markets to invest in differentiation through marketing instead of product. This argument is in line with Martin et al., (2020), who writes that “*marketing differentiation helps INVs to develop new and distinct products*” (p. 26). In being unique, BGs can broaden their expansion and therefore increase their survival chances (Efrat et al., 2017).

The industry examined in this thesis is innovative and relies on new technologies but entry barriers are low enough for a large number of competitors to enter the same markets at the same time. Hence, in the e-scooter industry, product differentiation exists only marginally. Marketers of the companies have worked on differentiating their product, for example by better vehicles, but customers might not have been able to recognize the quality difference. BGs have advantages when emphasizing product quality, one of them being customer loyalty, another being the ability of charging higher prices. Precondition for those advantages to become effective is, of course, for the consumer to recognize the difference (Knight et al., 2004).

Even though unique aspects were addressed in BG literature before, the context of uniqueness was mostly discussed in regard to the product. In their highly influential article, Knight and Cavusgil (2004) name the ability to develop unique products as one of the four business strategies BGs pursue. They further go into more detail by pointing out that *“the ability to develop unique products derives from the innovative and knowledge-intensive capabilities of these firms. Unique products development reflects the creation of distinctive products, and is akin to differentiation strategy, which involves creating customer loyalty by uniquely meeting a particular need. Marketing scholars have long recognized the inherent value in providing unique offerings, so as to differentiate the firm from rivals (...)”* (Knight & Cavusgil, 2004, p. 131). Tanev (2012) summarizes that Born-global firms adopt differentiation strategies by developing differentiated designs and distinctive products that target niche markets. BGs focus on stimulating customer loyalty by meeting particular needs.

Study 1 showed that the biggest struggle for the companies interviewed is building brand loyalty. A brand is one of the most valuable assets companies have, therefore building brand loyalty in consumers is the focus of the marketing strategies of many companies (Zehir et al., 2011). As markets become more fragmented, sophisticated and competitive around the globe, brands are forced to build long-term relationships with their clients (Rust et al., 2004). Loyal customers are less likely to switch to another brand of the same product category and are willing to pay more for a brand (Jacoby et al., 1978).

For BGs, building brand loyalty is a challenge, as brand loyalty usually builds up gradually in the consumers' behavior (Salomão, 2019). The authors continue to say that since BGs invest in rapid globalization, from a consumer's perspective it seems as if these brands emerged from nowhere. BGs have not been built up gradually as large enterprises do, so consumers do not yet have developed associations or loyalty towards them (Salomão, 2019).

Functional vs. Emotional Branding

Branding helps a company in regard to positioning, gaining competitive advantage and facilitating the firm's international business. Global brands can increase customer trust and confidence which reduces the risks connected with globalization. A good brand image can help BGs to reduce market-related uncertainties, establish a good reputation and enhance their international performance (Efrat & Asseraf, 2019). Especially in regards to their challenging external and internal background, branding can serve as an important tool for BGs: it reduces customer uncertainty, enhances customer satisfaction and confidence (Yin Wong & Merrilees, 2007) and

establishes legitimacy. This in turn leads to a quicker market expansion and enhances BGs performance (Bangara et al., 2012).

Similar to the discussion on types of differentiation in the BG realm, the discussion proceeds about functional and emotional branding. Recent literature emphasized the importance of emotional branding in enhancing BG performance (Efrat & Asseraf, 2019). Research showed that BGs tend to neglect branding, and if they do not, they mostly pursue functional branding. Functional branding can be defined as “*designed to solve externally generated consumption needs*” (Park et al., 1986, p. 136). Products branded as functional, target functional consumer needs and are described as preventing or solving problems (Efrat & Asseraf, 2019). Functional branding efforts are driven by the company’s innovative products and use of technologies (M. Gabriellsson, 2005) as well as by the innovativeness of the BG. It has shown no impact on BG performance, which leads BGs to misunderstand their customers’ preferences and provide them with value less desired (Efrat & Asseraf, 2019).

Emotional branding on the other hand enhances BG performance (Efrat & Asseraf, 2019) and can lead to trust and loyalty (Lai et al., 2010). Emotional branding is an approach that is consumer-centric, relational, and story-driven with the goal to forge deep and enduring affective bonds between consumers and brands (Roberts, 2004). It fulfills internally generated needs, for example self-enhancement and group membership (Efrat & Asseraf, 2019). The consumers’ engagement is beyond satisfaction and creates a trust-based relationship and a holistic emotional experience (Morrison & Crane, 2007). On top of other benefits like a positive effect on word of mouth (Carroll & Ahuvia, 2006) and increased customer engagement (Thompson et al., 2006), emotional branding also facilitates brand loyalty (DeWitt et al., 2008; Oliver, 1999). In the fashion industry for example, which is highly competitive and characterized by consumers that are, to an extent, apathetic to brand choice, brands employ emotional branding to distinguish themselves and engage their customers (Y.-K. Kim & Sullivan, 2019). Research by Steenkamp (2017) confirms that emotional branding increases in relevance when markets are highly competitive. In establishing brand loyalty, emotional branding establishes itself as a critical factor and thus leads to a long-term, committed partnership between consumers and brands (Fournier, 1998). Emotional branding strategies use tactics and narratives that demonstrate an empathetic understanding of customers’ inspirations, aspirations, and life circumstances which generate warm feelings of community among brand users (Atkin, 2004; Cova & Cova, 2002; Fournier, 1998). Some practitioners in marketing see emotional as one of the central pillars of market differentiation and competitive advantage (Atkin, 2004; Roberts, 2004). In contrast to the tangible features of a product, where functional features can be easily copied, its intangible

benefits are the ones that are hard to imitate, and thus portray the distinct qualities which create value (Aaker, 2003).

The arguments collected should affirm BGs to stronger invest in marketing differentiation and emotional branding efforts, as those can increase the companies' differentiation assets and thus drive brand loyalty (Lai et al., 2010). Furthermore, marketing differentiation is flexible, comparatively low-cost strategy, that has proven to be efficient in turbulent environments (Porter, 1980).

The reason why BGs neglect these strategies is a suggestion for future research. One finding is that companies with better technologies attract VC (Conti et al., 2013). The authors reveal that – from a venture capitalist's perspective – better technology is measured by the number of patents filed. The e-scooter providers with the most patents filed in Europe (*Espacenet - Patent Search*, n.d.-a; *Espacenet - Patent Search*, n.d.-b) are also the companies which received the highest external funding (*Förderung ausgewählter E-Scooter-Anbieter weltweit 2019*, n.d.). The preference of venture capitalists to invest in technology-focused companies could be a cause for BGs to communicate functional aspects in their marketing as well as differentiating with technology-related assets.

7. Conclusion

Although BGs have received much attention in research during the last 25 years only few studies looked into the marketing strategies of these companies or combined them with the EM viewpoint to study these firms and their behavior (Mort et al., 2012). Within the studies that did connect EM theory with BGs, findings are scarce and inconsistent (Hallbäck & Gabriellsson, 2013).

Particularly in a new and growing company, marketing *“must be the ‘glue’ in the firm which guides and coordinates all activities with a view to create customer value”* (Hagen et al., 2019, p. 261). Marketing needs to be a fundamental function in a BG: With its sensing and bonding role, marketing links market needs with the company’s capabilities, hence playing a crucial role in identifying, assessing and satisfying customer needs. BGs act in a highly competitive market on a global scale, with rapidly changing technology and customer expectations, and marketing creates responses to such market needs (Hallbäck & Gabriellsson, 2013).

Research in this study discovered a range of results. In the qualitative part, interviews were conducted with marketing executives of two BGs to explore their B2C marketing. These companies allow an pertinent comparison, as they market similar products and entered the market at a similar time. By now though, one of these companies is European market leader whilst the other was acquired by a competitor. Concluding that success is likely not to stem from product differentiation, marketing strategies of the two companies were compared to uncover whether differences in marketing could be the deciding factors for success or failure and if so, in which ways. The comparison was conducted using the EMICO model, a qualitative research tool for the analysis of EM in SMEs (Jones & Rowley, 2009), which had been found to work efficiently in explaining marketing behavior of BGs as well (Kowalik & Danik, 2019). By allocating the 15 elements of the EMICO model to their relevance to the respective company’s marketing, the difference in their approaches were made visible. It was revealed that the successful company focused on more than double the EMICO elements than the unsuccessful one in its marketing. Furthermore, its set of elements was balanced between the four orientations of EO, MO, IO and CO. The acquired company neglected elements of CO and IO and focused on MO and EO only. This can be interpreted as, for a B2C BG with little product differentiation, a balanced set of marketing elements can make the difference between success or failure. In addition, the study showed that neglecting elements of CO and IO results in unfulfilled customer needs and untapped creative assets to overcome market challenges.

Despite their differences, both companies struggled most with building brand loyalty. This is caused by market saturation and lack of product differentiation between the providers. The insights gained in study 1 were further investigated by a quantitative study to see how the different approaches to marketing perform in their regard to brand loyalty. This is a novelty in the research realm of BGs, as most literature depicts BGs as settled in niche-markets where they reach market share through highly differentiated products (e.g. M. Gabrielsson, 2005; Hartsfield et al., 2008; Knight & Cavusgil, 2004; Rennie, 1993).

In study 2, the core elements of B2C BG marketing as revealed in study 1, are tested on their impact on brand loyalty. Of the elements tested, brand uniqueness came out as having the strongest impact on brand loyalty. This finding indicates that brands must be unique in order to gain brand loyalty. As the market under study shows a high similarity in products, BG brands miss out by focusing on differentiation through product instead of on differentiation through marketing. The element of marketing differentiation in BG literature has received little attention which is why these findings add to existing literature. Within this field of research, the role of branding as a potential growth facilitator of BGs has received even less attention (M. Gabrielson, 2005; Altshuler & Tarnovskaya, 2010). Recent literature takes up the branding approaches of BGs and finds that BGs tend to neglect emotional branding (Efrat & Asseraf, 2019). Thereby, BGs miss out on opportunities created by customer bonds, trust and brand loyalty (Lai et al., 2010). Furthermore, while product assets and functional features can be easily imitated by competitors, it is the intangible benefits of a brand which are hard to imitate and thus portray the distinct qualities which create value (Aaker, 2003). Our call to BG managers is to stop limiting their opportunities, caused by pursuing product differentiation efforts and functional branding, and dare to enter competitive markets by following a marketing differentiation strategy and elements of emotional branding.

7.1 Theoretical Implications

The theoretical contribution of this study is addressed foremost to research in international entrepreneurship and international marketing by providing an understanding of the EM practices in the context of BGs.

The results show that B2C BGs require a balanced set of marketing approaches to succeed in crowded markets. Here, CO should be considered, since its elements are core to building brand uniqueness and brand loyalty. These findings add to an area of literature that discusses which factors of EM contribute to the success of BGs.

Furthermore, findings represent novelty in the following areas:

In relevant literature, innovativeness in BGs is explained by their ability to enter markets with innovative, thus unique, products (Knight & Cavusgil, 2004; Martin et al., 2020). As, in this study, brand innovativeness was not significant but brand uniqueness was highly significant on brand loyalty. This shows that innovativeness does not necessarily implicate uniqueness. This discussion is especially relevant to BGs which operate in markets with few product differences. Though depicted in such a way by literature, BGs are not merely active in markets where they are present with highly differentiated products and successfully gain a large market share by following a product differentiation strategy. As this study showed, BGs are present in highly competitive markets with little product differentiation. Here, they struggle to gain brand loyalty in the short amount of time they have been active in their market, as they lack the time required to build up this asset. The novelty about this discussion is the notion of brand loyalty in the realm of BGs. Due to the limitation in literature of their sole entry into niche markets, this discussion was neglected to date. Our findings can be generalized to other BGs in highly competitive or saturated markets.

Our studies' findings support existing literature on differentiation efforts and highlight them in the realm of BGs: as, ultimately, a brand needs to be unique to attract brand loyalty (Porter, 1980), BGs must learn to communicate their uniqueness beyond technical functionalities and build up intangible resources of marketing differentiation and emotional branding. This can result in a hard-to-imitate competitive advantage combined with a loyal customer base.

The qualitative study of this research – built on the foundation of the EMICO model – was enriched by consumer data. Adding a quantitative database to the adaption of EMICO elements can be advised for future research with the model as consumers' perspective added an additional different angle on the solely company-based findings from study 1. For SMEs or BGs active in B2C markets, this procedure will add value to the findings as offerings should targeted and follow customer needs.

7.2 Managerial Implications

This study offers managerial implications by discussing the choices concerning marketing strategies in B2C BGs.

In some of the literature (Knight, 1997), BGs are depicted as not able to invest in marketing due to limits in financial resources. Our findings refute this assessment from two perspectives: It was seen that BGs do invest in marketing but often in ineffective functions, as in some instances BGs' marketing approaches did not match consumers' needs. Thus, financial resources

can be allocated more efficiently. On the other hand, BG brands that do invest effectively in marketing but insufficiently so are missing benefits, as investment in branding can broaden market scope and facilitate entry into markets considered too risky otherwise. Thus, generating a fundamental base of research on useful marketing strategies for BGs seems undeniably important.

The results suggest that managers striving for brand loyalty should invest in creating a unique brand. In a market as competitive as the one under study, a differentiation approach by marketing can be advised.

Results also indicate that CO is crucial to a successful marketing strategy of BGs. By engaging with customers and spreading unique stories around the brand in the relevant environment, companies can gain competitive advantage. Furthermore, assets won through emotional branding assets can build up a set of intangible resources which are hard to imitate by competitors. These findings should give BGs confidence to enter markets with a higher saturation or lower levels of product differentiation, thus expand market reach and defeat competitors.

The findings of this study shall enable BG managers to optimize timing and amount of resources.

7.3 Future research

The impact each orientation of EMICO has on the success of BGs in different settings is an area of research which is still being disputed (Vargo & Lusch, 2004). For example, this study showed that a balanced strategy of orientations did succeed whilst focus on MO and EO did not when neglecting IO and CO. Firstly, an interesting addition to this study would be insight into success of BGs whose marketing strategies focused on IO and CO while neglecting MO and EO.

Second, this study pointed out lack of insights into brand loyalty in a BG setting. As differentiation and loyalty efforts bear large potential for the growth of BGs, this field of research could be of specific interest for BG professionals and executives.

An interesting assessment would be a study on whether specific factors of a BG's marketing strategy are a signal for external parties to acquire the company. As our findings show, the company which was eventually acquired had focused their marketing on EO and MO only. It should be discussed if this is a factor contributing to the attractiveness of a BG as an acquisition target.

Another interesting research question which was touched on in this study is whether product differentiation is a strategy BGs pursue to attract VC funding. Here, the comparison between

potential benefits gained from marketing differentiation and emotional branding versus potential gain of VC through product differentiation and functional branding would constitute an interesting juxtaposition.

7.4 Research Limitations

The generalization of the findings is limited due to the exploratory nature of the study and the size of the research sample. The companies under study were homogenous in the sense that they were operating in the same industry. The structured interview method provides only indirect information, as it is filtered through the views of the respondents. The researcher's presence may bias the interviewees and not all participants are equally articulate and perceptive.

The fact that building brand loyalty was a struggle for both companies interviewed might be owed to the industry in which this study took place, characterized by highly similar products, few and low entry barriers.

In the quantitative study, more subjects responded to questions about Company 2. Thus, answers in the sample are overly weighted towards Company 2.

It is advisable for future research to extend the study to comparable samples originating in different industries, thus eliminating industry bias.

Appendix

Appendix A: Interview Transcripts

Company	Person	Position
1	A	Global Head of Partnerships

1. When was the company founded?

“So, the company was founded I think officially in December 2019. I think this was when it was founded. And then we put the first scooters on the streets probably also around December, but only as a sort of trial, in a few different markets. Originally what was put on them was “This is not a scooter”, was the brand, just to kind of test the kind of technology and test how it works. So, we didn’t actually launch branded operations. So, we started branded as “Flash” at the time and we started our branded scooters probably at end of January. I think that was when we launched our branded scooters in, I think it was Lisbon was the first place we put the branded scooters and then Paris very shortly after, only a week or two after that. Ah sorry, 2018 would have been the founding and branding in 2019. December 2018 founding and then first branded scooters very early 2019 I think maybe it started in February. The non-branded scooters we launched in Zurich and then in Lisbon I think so just to sort of test it out. It was partly to see how people were using them and where people were using them and the kind of journey times and everything else but it wasn’t so much that because you know we had an idea that it was going to be successful and that wasn’t you know the most important thing to solve first. First it was to make sure we actually got the technology working, to make sure people could actually lock it and unlock it and could the technology actually work. And then after that it was more that we started to look into how people where using it.”

2. How many countries were you present in?

“We went from I think we were in two countries launched, in France and in Portugal, we ended in I think 12 countries by August or July, we were in the Middle East in the UAE I think was the last one in I think in August. We had a wild ride; I think we almost reached 50 cities as well by that time. It was really just sending a load of guys to a country and be like “hey you are in this country now” so it was really an adventure. And it isn’t easy to launch a city or a country, it is very different to a kind of business where you can just kind of get whatever regulatory approval you need and make sure you have the terms and conditions and the different language and stuff and then you can just operate. Rather, we would actually have to find a warehouse, which is the hardest part. Finding somewhere to put these things, to charge them, hiring all the local drivers, talking to the mayor as well bcs we always wanted to first speak to the authorities before we launched anywhere. We thought it was very important to try and get their permission. We didn’t want to do the kind of “Uber-model” where you just kind of rush in and ask for forgiveness. So, we had to do that and there were so many steps involved. There were two types of cities, one being completely closed, just not allowed. In those cities nationally it was legal to ride scooters. An example might be Leipzig. The city was closed itself, but it was legal to ride scooters in Germany. Whereas in other countries it was completely illegal to ride the scooters and the cities didn’t want it either, London for example. You couldn’t even unofficially operate in London. So cities like Leipzig were you could legally operate we thought of running a private network where you would basically have scooters in front of supermarkets and these kind of things and as long as you are parking them on private property you could run a private network. I’m not sure whether we actually ever did that but that was sort of the idea. And then after that

you had cities with a lot of restrictions. It was possible to do it and the mayors cautiously welcomed it, but they had a lot of restrictions on, for example, slowing down. In some countries they wanted us to slow the scooters in certain areas. Or in Germany they would put up “No Parking-Zones”, all these kinds of things. There were lots of restrictions on where and when you could ride them on pavement, off pavement, these kinds of things. And then the final category was cities where there was no regulation and you could just do whatever you wanted. So, there is kind of different relationships with the cities. They would have their own strategies with dealing with it. In that context we then had to figure out the regulatory situation and then obviously put these things on the ground as quickly as possible. And then also a big part of that was getting as close to public transport as possible bcs public transport is important in Europe and I think a lot of scooter players in Europe saw Europe as a much more fit place for scooters than, let’s say, the US, where it started, bcs of the interconnectedness with public transport and the idea that you could really prove the Last Mile concept, which everyone was going crazy about, where you basically take an U-Bahn and when you get out of an U-Bahn you then hop on a scooter and use it for the Last Mile to your station. So, everybody was obsessed with signing partnerships with the public transport operators, but that was more complicated than it sounds. Maybe we get to that in a minute.”

3. Which market was the first?

4. How did it happen you approached international markets? (proactive vs. reactive)

“We looked into lots of different tactics and lots of different variables on what might work. In the end there wasn’t really any proven variable for what really works. Probably the closest thing is just “Does the country or the city have disposable income?”. So cities for example in Germany where the disposable income tends to be higher tended to be better, like Munich and so on. Tourism is also a major aspect. And also any kind of bike infrastructure like Berlin for example really makes a big difference as well. And also seasonality is an important one. I don’t think we ever got to manage to put together an actual scoring system with all these different variables, but I think it is some combination of seasonality, disposable income, cycle infrastructure and tourism.”

5. Generally, what were your objectives?

“It was really about growth as fast as possible. And that was the same for all the scooter companies. Bcs everybody was just racing to grow and win market share as quickly as possible. It was really some kind of turf war about who is going to be the biggest. There is sort of this idea that people aren’t going to have more than two or three apps on their phone, two or three scooter apps. So, you have to be one of those two or three apps. Something we noticed and the whole industry noticed was that it really makes a difference if you’re one of the first movers. Precisely for that reason that people have a kind of “app fatigue”. I think somewhere on the internet you might be able to find it, that someone made an analysis of how many scooter apps people downloaded, it was on some Medium post or something. And it is basically: 80% will download one app, 70% will download two apps, only 40% will download three apps and like 5% will download four apps. So you have to be in these top three apps and have to be one of the first apps that people interact with. So, for that reason it is also about getting to a city first but it is also about getting enough scooters in the city as well to reach a kind of density where people would actually use it. So then within cities there are all kinds of different launch strategies, and many different arguments about what is best. Either you go to the tourist areas and then you will get lots of different journeys on your scooters. Or you go to more kind of more residential areas where you are getting more sort of long-term residents who might actually use the scooters on a more regular basis, sort of “cohorts” as you call it. Persons coming back might look better if you try to target customers who actually live in the city rather than customers who are only there for a weekend. So that was always the question: “what matters most?” I think people to

be honest in the industry weren't very focused on cohorts, in terms of people coming back. And the investors I think as well. Everyone was much more focused just on growth, how many rides you're doing, how many customers you have, this kind of stuff. And how many rides you're doing per scooter as well was a number one kind of metric, the journey per scooter per day. And then it became this kind of ridiculous war. Everyone was racing to get to 1 million rides, then to get to 5 million rides, then to get to 10 million rides. How many days has it taken you to get to as many rides as possible? And no one cared outside the scooter world. Honestly, I think, in hindsight, anyone cared outside the bubble. But all of the scooter companies were going crazy trying to beat these numbers and to publish these numbers. "We were first to 1 million in Germany", creating new metrics. "What is your rank in the app store?" "Oh, we're first in the app store!". So, it was completely shameless bragging in many ways. But there wasn't much thought behind what actually should be focused on in the long term. It was really a fundraising war. Who is going to raise the next big fundraising round? Because it is extremely capital intense to put the scooters on the ground, it burns a lot of money to buy them, especially before the scooters weren't such good quality, so it took a while for the generations to become much more resilient. In the beginning, the scooters didn't last very long. Especially in that time it was about who can raise more money and who can put more scooters on the ground basically. I don't think there was a final goal in any of the companies. I think most probably we didn't want to be not bought really. I mean at any point you could be bought by one of the American guys, which was what happened to us. But I don't think that was never anyone's plan. I think the only plan was kind of to build a "European Uber". I think that was most people's idea of success. And doing it differently. I think the European scooter companies wanted to do something a bit different. I think [Company 3] would have a different approach. I think in general it was about trying to build this European champion, but in the process obviously it was quite a tough war."

What are your unique selling points?

"I think being European, in terms of asking for permissions. And also investing in vehicle design. Efficient operations. Sustainability, focusing on being green for the environment and using green charging and this kind of stuff. All of these were important for three groups of people: One, for consumers. Two, for cities, so we would have to go to cities and be like, "Hey look, we're green, we have these green credentials." And also, it was important for any kind of partnerships that we were working on. Whether that's with private companies or with public transport companies as well. There was also a mad rush between all of us to get these public transport partnerships."

What criteria did you use to evaluate your marketing performance? What was your measure of success?

"We touched on that a bit. I think there wasn't a big focus on the right KPIs, because it was mostly about pure numbers of rides and growth and revenue run rates. These were sort of the main KPIs. We also looked at cost per acquisition obviously, so how much we would be spending in marketing and how many rides we would be getting. But all of this marketing didn't really have a clear strategy, because nobody really knew how to do scooter marketing. It's still not clear, I think. I don't think anybody really knows, because there are two camps in this battle: one. I think you see it between companies and inside companies as well. On the one hand you have those who say: "Okay, we don't need to spend any money in marketing because we can just put our scooters on the ground and they're going to be their own marketing. And then the second camp is: "That's not enough, consumers at some point are actually going to care which brand they're using and if there are two scooters next to each other they will go for one scooter over another." I think with that in mind that battle was never resolved. I think between scooter companies or inside the scooter company. Essentially, this battle just kind of went on and it

never sort of reached clear resolution. We tried lots of different things as did all of the competitors as well. So we at some point tried just putting them on the ground and it worked. If you put them in the right location which is also key in the scooter world. You have to put the scooters on the right place in the right time as well, which is surprisingly hard to do and all the scooter companies will have a lot of data guys working on this, trying to figure out when and where to put them. So if you can put it there at the right time then in theory somebody's going to walk up and use it. And then there is sort of another level to augment the effectiveness of that: to put flyers then on the scooters which say "You can have a free ride for 5 minutes, 10 minutes, 15 minutes" or something to try to further push people to download the app. But then there is this argument that with that method you are basically cannibalizing yourself because when a person is so close to the scooter then they are probably going to ride it anyway or are highly interested in using it. So what is the incremental value of basically putting the extra free ride there and cannibalizing your own revenue. You have a highly interested party already and you're just giving them something for free. So that was never really looked in to. And I think to be honest across the whole industry there was never really a lot of time spend on these topics, because everyone was trying to rush so fast and to do things so quickly and most of what people did was just copying the competition and just trying to keep up with the competition. To my knowledge, nobody really spent a lot of time doing the work needed to properly analyze and to control test it. "It is better to have a sticker or not?" And that is fine because in the start-up world and in a new industry you don't have time because everyone is working 15 hours a day anyways. It is a luxury to be able to do that in a more established company. But it is very interesting because I think that this battle was never resolved. The next level of marketing is sort of performance marketing. We tried Facebook and Instagram and also Search Ads. App Store ads, promoted app rankings, to basically push people in that direction. It is hard to say how much that really worked because again nobody was really clear on what the actual funnel was. Do people first think "Oh, I'm going to ride a scooter and then figure out which scooter we are going to want to ride and then we go out and find that scooter." Or do they just find the scooter and then download the app for whichever one is in front of them. Most people believe that most people just see a scooter in front of them and download the app. I think though, you have a set of power users, probably like 10% of the rider base, who actually really care about what scooters they are using. They would spend a lot of time trying them all and would choose one and would be loyal to one and then would probably walk another block to find that one scooter. But most people didn't really care about that. Marketing to reactivate users was quite effective. What we would also do is send out SMS and push notifications and whatever offering free rides or free rides on a particular weekend and these kind of special offers. These were quite successful to get people back on the scooter. And then also what we would spend quite a lot of time working on – I'm not sure whether we ever actually launched it to be honest – were different sort of prime systems where you would pay a certain amount per month and you would get unlimited unlocks for example. Because all of this marketing focus at some point started to shift to "okay, how can we get people to use these things more regularly", rather than "how can we acquire tons of customers." Because that was also one of the problems. I don't believe the narrative that it's only tourists that are using it. A lot of residents were using it and we knew that because we would see that the phone numbers in 80-90% of the cases were country prefixes. So it was mostly probably residents using them but it was still people just trying it once or twice. For 10% of the population it became a sort of proper means of transport, but most people saw it as a fun thing they did for a couple of hours on a Saturday and then never use them again. They didn't make the connection to "Oh, I can actually use this to kind of accelerate my trip to the metro station." So that was then all part of the strategy, "How can we increase the frequency of rides?". Then we spent a lot of time working on these sort of prime subscriptions and also on trying to do partnerships with public transport and so on to get into people's heads that actually this might be a good idea to use as a supplement to public transport."

Were you successful in meeting these criteria?

“I mean we did grow a lot. And I think in certain cases and on certain events and ad-hoc basis we were also successful in winning customers and placing scooters in the right location. Another big thing which became was referral benefits. You know, refer a friend and get 15 minutes for free. This was used across the whole industry and it was another sort of understanding again to that people are using a scooter when they’re in front of it. And when they’re in front of it, their friend is probably also there so you could get their friend to jump on it as well. But again it’s like for flyers: if 80%, I don’t know, I’m making this number up, but if 80% of those referral bonuses came from somebody who’s just standing right next to somebody, is that actually a goof use of that money because if they’re that close they would probably get on that scooter anyway. But if you love this scooter and all your friends are riding another type of scooter you’d would come up them and be like: “Hey guys, ride this scooter and you get 15 minutes” and then they try this scooter and they prefer it for whatever reason, the app is better, or the scooter is better, or whatever else, then it’s an acquired customer. So it would really make sense to do that. But again, there wasn’t really that kind of analysis done into that topic but it’s another interesting question. So, it was successful, I mean growth was good, the rider numbers were crazy, but it’s very hard to be able to credit that in any real way to marketing, because again there was never really an attribution model that worked. You could look into things like “Does a company that did actively do marketing, like [Company 3] or [Company 1] or [Company 2], versus a company that didn’t really do marketing, or at least performance marketing, like for example [Company 3], perform any better?”. Although it wouldn’t be fair comparison because [Company 3] was so big that they didn’t need to do that marketing, everybody knew [Company 3]. They had more scooters on the streets, people had already spent two years using [Company 3] in the US or in other places, it was a sort of household name, everybody had the app on their phone anyway. So, when they launched in Berlin for example, it is hard to say for example “Oh, [Company 3] didn’t use any marketing in Berlin, but they were fine” because there was [Company 3] here and then all of the European guys. So that is a completely different game. And all of the European guys had almost the same strategy in terms of marketing across all channels and in terms of acquisition and reactivation.”

How did you develop your marketing strategy? *If not mentioned, ask:*

Who was involved in the decision-making process?

Did you look into marketing programs of your competitors and made things similar or different?

Did you involve learnings from your previous experience in building a marketing strategy? If so, what were these?

“I don’t know whether it was a good process. Again, the process in short was an internal dispute between what was better: Just leave them on the street or invest in marketing. And in the end it turned out to be some sort of compromise between these two parties, where we would try and invest as much as possible in putting as much scooters on the street as possible and in buying scooters or we would attribute a small amount of money and try in experimenting with performance marketing, and you know, give out free rides and do the referral program and subscriptions and everything else. There was no real strategy because it all comes down to the fact that nobody really knew what worked and nobody had the data to back it up, so everything was a hypothesis and in that situation, you just hedge your bets. Everybody had experience in other tech companies and other start-ups so everybody was bringing experience to the table but we had a lot of people working in the food delivery industry previously and they had a very certain way of thinking about re-ordering and how people interact with ordering from apps and so on. But it doesn’t necessarily translate directly to the scooter world. Again, everybody had these

kind of lenses about doing things but when you have a product that is right in front you – I can't really think of a product that is both: you acquire customers physically by them being near it in terms of proximity but it also has a long term recurring effect. It is very hard to think of an alternative. I mean you have vending machines and stuff which also are things where people walk up to it and it looks good and buy spontaneously from it. But then they wouldn't necessarily see the same vending machine in a different place and be like "Oh, I really have to use that vending machine, because it's so cool or whatever." So, it's a very different way of marketing and I don't think anybody had really encountered something like this before. Some people came as well from the bike sharing industry and they had some relevant insights there. But the bike sharing industry is much more driven by public partnerships and such. So, it's a bit different and the numbers are completely different. Scooter riding is much, much, much more popular and especially last summer was really "hot", you couldn't put enough scooters on the street in many cities. That was never the case in bike sharing, it was always sort of available. So it completely changed the dynamic how you could think of bike sharing as well."

Which elements of your marketing strategy do you think were innovative?

"As I said, I think there was no real difference between the European marketing guys. I think everybody was doing the same things. But I think the industry as a whole was being extremely innovative. The industry was really trying new things and trying to build something which has never been done before. And it very quickly in Europe it rotated around certain values, around working with cities, around being involved in national legislation and government, eventually around safety as well, asking people to wear helmets and trying to show that we were more safe than anyone else. But everyone was doing the same thing, So I think it wasn't like anyone was being more innovative. Some did kind of cool marketing stunts and stuff but in general it was pretty aligned between everyone. Everyone also quickly jumped on partnerships as an important factor, trying to sign partnerships with local public transport companies and so on. So, I'm not sure anything particularly was different because everyone was copying everyone else. But it was as a whole a group of companies and a group of people and an environment that was totally new, trying to figure out, while traveling a hundred miles an hour, which strategy will work and how you can differentiate from the competition and whether or not it is even possible to differentiate yourself or if the customer even cares between the competition. I think we were different from the competition. I think in any way we differentiated ourselves. I think though we probably thought we differentiated ourselves more than others. We might have said "Oh, we're more focused on the environment than others" but then others, a week later, came out with something about the environment. Or we would say "Oh, we're more focused now on the cities and our relationship with the cities because we're going to do this and we're going to launch some code for the cities and they can all jump on board and so on" and then a week later someone else would do it as well. So there was never really a last thing advantage because everyone was copying everyone else. And it's hard to keep track of who did what. I mean I think back to it now and I'm like "Oh yeah, I think we did that" but actually maybe [Company 3] did that before us. And there was so much happening in so many countries around the world and most scooter companies as well had a very kind of decentralised model or decision making. So you had central technology and central services but then you had local country managers and then each country manager had a group of city managers who were doing completely their own things. They were taking decisions and prioritising things and launching initiatives and training and hiring in completely different ways. You have to stay close to the cities and you have to stay agile and there is a huge amount of mutual variations around what's possible in places. But it also makes it impossible when you're in the middle of it and doing a hundred miles an hour to keep track of what everyone is doing in different places. People would share some stuff over WhatsApp like "Oh, look what these guys are doing. Look what those guys are doing." But I

mean everyone ended up copying each other. But as an industry I think there was definitely a lot of innovation for sure happening.”

What differentiated your marketing strategy or your marketing campaigns from your main competitors?

Did you change your marketing strategy over time?

How and why did that happen?

“I don’t think in any considered way. I think at one point we became more focused on trying not to show people riding without a helmet and stuff, trying to be more safety conscious. But apart from that I don’t think there was any kind of real conscious change in strategy. It was again just always trying to walk this break between ‘should we invest more in traditional marketing as you might think of it for a tech company or should we focus more on the ground and let people use the scooters.’ We focused on the security aspects more because partnerships with cities would be easier and we also thought that safety will become an increasing thing for users because at some point users might either have an accident or know someone who’s had an accident and we don’t want that to be a bad reputation for our scooters. First, for the industry and second for the company to get a bad reputation. So it was seen as important and not just the right thing to do but also as an important factor to build trust in the industry and in the company itself. And maybe one or two companies weren’t going to do that or didn’t want to do that and then if that was the case – I think in the end everyone started to focus more on safety, especially towards the middle or end of last year [2019]. But if they hadn’t than it would have been important to kind of be differentiated.”

Did you generally focus more on offline or online marketing? Why?

“Again, the question really comes down to “Do you need to do online marketing?”. So I didn’t think there was ever a kind of decision like “Ok, now we are going to do more online” or “Now we are going to do more offline.” It was more just “Let’s just try and balance the two and let’s try and have a mix and try to get our operations as well”. Marketing at some point also processes into operations and data science and stuff because you need to know where to put the scooters. You have the data to prove it that this location is good versus this street corner. I mean even small differences can make a big difference. And then there is also this event-based marketing, like there is going to be a big football match, let’s put a hundred scooters outside. Sort of more opportunistic things, where you basically just try and catch a certain wave that is happening.”

I am going to list a few elements of a marketing strategy, please tell me which of these elements you incorporated in your marketing strategy:

Offline	Online
Print Ads “I think no. I don’t think we did. We discussed it but I don’t think we ever actually did.”	E-Mail Marketing “Yes.”
Flyers “Yes. Tags on the scooters and handed out in certain locations, at tube stations and such.”	App / App Store Advertising “Yes. And App Store Ads.”
Merchandising (e.g. Helmets) “Yes, helmets. I think only helmets. And the scooter itself in a way. You try to put as many scooters on the street as possible. There was a lot of time spent on scooter design. How do you make it more visible? Because you have to be able to see it. And then when Jump	Push Notifications “Yes.”

Bikes came out, everyone was like “Wow, look at Jump Bikes, you can see them from so far away.” And then everyone tried to copy this Jump Bike color. But apparently Jump have some copyright or something on the color. There is some reason why it's special. And then everyone was trying to copy this Jump color but they weren't able to.”

TV ads

“No. I don't think anyone did TV ads. Because TV ads you need enough of the population covered. At some point it might make sense to do TV ads but only when you have probably the number of cities about 50+ in one country. Then you actually get the kind of network. It is some sort of machine gun approach. You fire it at everyone, and if people are downloading the app and they can't see a scooter anywhere near them then it is just going to annoy them. And the operation systems even within the cities are much smaller. When we live in the downtown city areas, we see them everywhere and we think “Oh, these things are everywhere.” But the operating areas within cities are very small. Even when you go ten streets north all the time you don't find any. Even when you were to do it within one city, TV ads, it really wouldn't make sense.”

Sponsorships

“I don't think we formally sponsored anything. Expect for the mobility events, there were these kind of micro mobility industries. Maybe you have seen the Twitter Accounts. There is this yearly conference where the micro mobility people come and I think we were the sponsors as well as of other conferences, like certain cities would have a conference about mobility and we would sponsor it. But I don't think we did any kind of real public sponsorship of anything. I think that would have come later down the line. We didn't need to be honest, people were talking about us anyway. We were new, we were on the street, people were writing about us. So, it wasn't really necessary at that time. There was always a lot of discussion around “Should we allow others to sponsor on us?” because it can make a lot of money. I think some bike companies are doing this and they make quite a lot of money selling space, like

Search Engine Advertising

“Yes. I think so at some point we did that. But I think it was not continued for a long time, but we did at one point. Because no one really searches for scooters. I think that was kind of the learning.”

Social Media Advertising: Instagram, Facebook, Twitter, YouTube, Snapchat, LinkedIn

“Yes, just Facebook and Instagram.”

<p>Santander Bikes in the UK and stuff. In the end, I don't think we did any private partnerships. We did some co-branding with public transport on certain areas."</p>	
<p>Partnerships with cities or other companies</p>	<p>Geo Marketing "Yes. We had to. It is super important really. Otherwise you're spending money on people that can't download the app, it's like with the TV ads thing. So super important to do Geo Targeting."</p>
<p>Deals such as Promotion Codes or Special Offers "Yes, we did a lot of this."</p>	<p>Influencer Marketing "Yes, we also did a bit of Influencer Marketing. I'm not sure how successful it was. Not in all cities, because again there was a kind of a localized approach and there was a local marketing for each country. But some of the countries did do it. In Germany we did some. There weren't like big influencers. It was a like "That guy is an influencer?" kind of thing. To be honest, I was always skeptical about this. I thought it was a bit silly. It's like jumping on a trend. But anyway, we did do some."</p>

How is your marketing strategy helping to achieve your objectives as a company?

"It was all about increasing rides. And about being seen as the winner. It was about being the Go-To brand in peoples' minds. And I think that that was important for all of the different reasons, for all the different stakeholders: the cities, we wanted to be seen as important enough that cities would listen to us and would see that other people would like to use us. And also, the customers obviously, you need the network effect, that people recognize the brand, use the brand, refer the brand, refer to friends. And then also for doing partnerships towards cities it kind of helps. Everything was viewed through this lens that there was only going to be a few winners. So it becomes a snowball effect: you have to do as much as you can as fast as you can, as quickly as possible, a crazy growth. So you can then emerge as one of these winners. The biggest one will get the most tenders from the cities. They will also get the most customers and they will also get the most partnerships which then kind of becomes a self-reinforcing positive circle. In many cases I think the marketing was fine. Was it optimum? No. Did we have all the data we needed for that? No. Do we have that even today? No. So, you know, in the circumstances I think it was fine. There was a lot of money spent and a lot of money wasted obviously as well. But again, it was an armed race in a completely unclear environment so in that context I don't think it was too bad."

What were the biggest challenges in your marketing strategy?

"How to split up the resources and should we invest anything in marketing. Resolving that question. Does it make any sense to spend money on Google, Facebook. Is my money better spent there or on buying more scooters? So that was kind of the biggest challenge for the marketing team, defending the marketing decisions. A lot of people thought it was a complete waste of money."

What were your biggest challenges associated with internationalization?

“Various. There was obviously all the different regulatory and finance stuff in all the different countries. In Germany for example you needed to mark the scooters, which was a massive process, getting them approved by the VBA, I was very keen on learning the German driving authorities. So, there were all these kind of regulatory issues across all the different countries. Sometimes the SIM cards didn’t work in certain countries, so technical issues. There were obviously language and linguistic issues, to get everything checked, not just for marketing materials but also for any kind in-app texts, notifications, or whatever else. I mean basically everything you could think of. Regulatory issues in regard to the warehouses and the drivers and the riders. How do you employ the drivers, or do you have freelancers? All these kinds of questions. Do you use third parties? In every country everything was almost completely different in regard to almost everything. The only common thing across all the countries was the application. Almost everything else had to be localized in at least some regard.”

Were there differences between the markets, did you need to adapt your marketing? If yes, in what elements did you adapt your marketing strategy and where did you standardize?

“I think in many ways you try to standardize, across the brand and the imaging, the copy of the texts, this kind of stuff. But you also have to take advantage of local opportunities and also mitigate local issues as well. Like in Paris it quickly became a problem that scooters were seen as problematic and, in that sense, you then have to be a bit more cautious about what kind of marketing you do and how you come across. You have to focus more on city relationships and safety instead of “We’re the coolest, or the fastest” or whatever else. You need a persistent brand which works across all countries and is quite recognizable. But then you have to be sensitive not only to the needs of each country but also to the circumstances of that particular moment in that country which changed on a monthly basis. So, you need the security to have local decision making supported by a central brand guidelines and decisions. I’m not sure we had that.”

How did you allocate resources to your marketing activities?

“I don’t think there was any kind of scientific research towards this, it was more like “Let’s allocate a small portion of the budget towards this, as a hedge”. The biggest part of the budget went into buying new scooters. So a small amount would go into marketing activities, because we thought we needed to basically. I wish there would have been a more scientific way. But unfortunately, there was such a lack of clarity around “What’s the ROI? Where would it make more sense?”. But there just wasn’t a really structured decision-making process in marketing. The time to test hypotheses that you need in order to understand where that money is going and where it is useful was just lacking.”

Which resources did you usually rely on?

“It was a really great group of people. A really fantastic group of people from a lot of different background working extremely long hours. But also, I have never seen something where people were so motivated and passionate to not just win and to be the biggest scooter company but people really did believe to change the way people were moving in cities. And I think it’s a noble goal, that’s why we all went there. We all wanted to be part of something exciting, and maybe make some money, and this kind of stuff. But it was also like we saw what the world could look like if there was way less cars and everybody saw that and believed in that. I genuinely believed that. Yes, there was a lot of competition, we wanted to be the ones that did it. We didn’t want to be the ones that worked a hundred hours a year to be the footnote in history. We wanted to be the ones that made that change. But everybody still wanted to do the same thing. Still today, at 9 am in the morning you look at the cars with only one person in it, it’s 80 to 90 percent. It’s crazy and it doesn’t make sense, it’s killing people with the pollution. Corona

Virus is killing people, but pollution has been killing people on a massive scale for years. So, it is a big deal and I think we really did believe in it. Yes, we had money to spend and yes, we had experience, but we wouldn't have been able to achieve what we did, such crazy expansion, organising logistics and that without people honestly almost killing themselves in terms of the amount of work they put in. Heroic hours and crazy last-minute trips to the other side of the world to fix things. It was really impressive. The office was never empty on a Saturday or Sunday, it was always packed with people. Nonstop, all the time, 24/7, never home before midnight. It was crazy and it was a lot of work, but it was also a ton of fun. But it was kind of a weird vibe where everyone was so caught into the scooter world, but it was a great experience.”

Did I miss anything? Is there one thing I did not ask that plays an important role in your marketing strategy building?

“No, I think that's more or less it. I mean there is no sort of answer. Which is also why it's interesting. There hasn't been a clear strategy proven by anybody. Maybe [Company 3], they would say that don't do any online marketing, so their strategy works. But also, they have more money than everyone else and a larger span than everyone else, but also, they started a year earlier than everyone else, so it's not a really fair comparison. All the European guys do some kind online, Instagram kind of marketing. So, it's unproven. My hypothesis is that it will continue to be some sort of mix that will be refined over time. Certain things don't work, like, print ads don't work, TV ads don't work, but certain other things do. But that is going to be the outcome of all of my successes in terms of working on different ideas and testing them and actually trying to have the time to learn.”

How did you feel when [Company 1] was bought by [Company 5]?

“It was an end of a journey. I think it isn't a bad outcome. But it's not what any of us wanted when we first started. But it's a good outcome under the circumstances. It was a very competitive market and, in the moment you think you can be the best and when you look at how much competition there is, inevitable there was going to be some acquisition at some point between the scooter companies.”

Thank you!

Company	Person	Position
2	B	Senior Growth and Marketing Manager

When was the company founded?

„Summer 2018. And I work for the company since November 2018.”

How many countries were you present in?

„15 countries I think it was. I’m not sure how it is now. Mostly in Europe, but we’re also present in Abu Dhabi, Dubai, so the Emirates.”

Which market was the first?

„In Austria. In Vienna.”

How did it happen you approached international markets? (proactive vs. reactive)

“The Amount of scooters you operate with is an essential aspect of the concept. It's a pretty sophisticated process to establish the whole infrastructure and that only pays off after a certain amount of markets.”

Generally, what are your objectives?

“The goal is to become market leader. Our goal was to be market leader in Europe. That was the highest goal.”

What are your unique selling points?

“Our unique selling points are the operations I would say. Everything is being handled internally. There are different models, for example Lime and Bird have a kind of Gig-Model, where everybody would charge the scooters and get some money for it. That was operated via a second app, the “Juicer App” I think was what it was called at Lime. At [Company 2], all operations are being handled by professional employees, who were trained for that specific job, who did the maintenance, break tests, etc. So there was a certain operations excellence, which was important to guarantee a certain level of quality.”

What criteria did you use to evaluate your marketing performance? What was your measure of success?

“There are certain KPIs that are necessary. One, is the acquisition, so how many new users you can generate, and two, is the retention, so how many of those users subsequently use the service over a certain amount of time. Those are the main criteria. My goal was that the users stay with the service, so to increase the retention. We had to make sure that a user returns. If you look at a market, let’s say Vienna, then you have let’s say 2 Mio. Inhabitants. From these 2 Mio., 40 percent need to be cut off, because they’re too old. Then maybe another 20 percent need to be cut off because they’re too young. So you have 40 percent of inhabitants that are potential users. In these 40 percent you would have to look at income groups to see who even can afford scooters. So we have 20 percent left. And these 400.000 people can be bought quite quickly, through ads or by just putting the scooters on the streets. At some point everybody is going to say ‘Oh, I am going to use these today’ because they are curious, especially when there are not so many competitors around in the beginning. Then this I achieved pretty quickly, the market saturation. And then success basically can be described by whether users return. And that is basically the main goal. In one city you always have an equal amount of tourists, that’s an average that stays the same. Vienna has a strong seasonality and of course the usage of a mobility concept which

is not a car, where you sit inside when it rains, is weather-dependent. The winter is a low-phase of course but for the remaining time it doesn't really matter whether you advertise for tourists or residents because this relation always stays the same. So you always have the same amount of tourists, same amount of working people. I don't know the actual numbers but a large percentage is tourists and a large percentage is residents. Residents can be split into commuters, so people who use a scooter to get to work, and working people who use a scooter during working hours, to get to a meeting for example. And leisure activity, so on the weekends, where we have different peaks from different user groups. On the weekends it's more a lifestyle thing, the younger generation, during the week it's rather older people."

Were you successful in meeting these criteria?

"Yes, very successful. Within one year we expanded to more than 40 countries. And geographical growth was a goal as well."

How did you develop your marketing strategy? *If not mentioned, ask:*

Who was involved in the decision-making process?

Did you look into marketing programs of your competitors and made things similar or different?

Did you involve learnings from your previous experience in building a marketing strategy? If so, what were these?

"Competitor analysis is always important. You shouldn't take it too serious though and put it as the main focus. But of course you look at the competition, to look how fast they are and to see what they do. It came down to days. How fast did [Company 3] reach certain numbers, then we compared: Where we faster or slower? A kind of race. But that is going to change now, that all European cities are basically placed. Not many, but most, the most important. And now it is about generating market share in those cities and also working together with these cities directly, in order to have a product that works as an addition to the public transport, not as a substitute. We also look at how the competitors reach their goals. For example we would look at where they positions their scooters, what kind of marketing they do, what kind of events they do. That is always on the radar. In my previous job I was at [Company 4] which was now bought by [Company 2]. Both are some kind of niche businesses. It's not E-Commerce where it is about bringing the people through some kind of tunnel. Sure, it also is a part of it but it is mostly about this first ride and then try to establish a rhythm in the customers' behaviour, by incentives, by trying to analyse the positioning of the scooters as detailed as possible to make it as easy as possible for the consumer to ride a scooter for the first time. You could either offer scooters to companies so that their employees can try them or try any other way to reduce the hurdle that people download the app and ride a scooter for the first time. When you have used a scooter once, chances are a lot higher you're going to use it again."

Which elements of your marketing strategy do you think were innovative?

"At [Company 4] we started with Apple Search Ads. That was innovative in that sense that no one else did it. When I started at [Company 2] that wasn't really the newest thing anymore. But we still achieved good results with it. What was innovative at [Company 2] was that we used new channels. But I think the innovation in marketing is a mix between product and technology. We worked together a lot with our product team and tried to use as many synergetic effects between tech and marketing as possible. We also adjusted the product to lessons we learned from marketing insights. You call that User Centric Marketing and User Centric Product Development. It is connected."

What differentiated your marketing strategy or your marketing campaigns from your main competitors?

„We paid attention a lot to branding. We have a clear, coherent style and a clear, coherent communication throughout all channels. I think this consistency, a certain straightforwardness, is important for a high level of recognition. What differentiated our marketing strategy from our competitors was also authenticity, a good customer service, and that everything, that involves the customer, offers a good customer experience. This good customer experience was also what we wanted to reflect in our marketing. Especially on LinkedIn for example we showed, what is going on at [Company 2] and what matters to us at the moment.”

Did you change your marketing strategy over time?

How and why did that happen?

“The team grew from maybe 10 employees to about 500. In total, not only in marketing. In marketing from one person to maybe 20. So of course the level of professionalism increased and as well the possibility to follow through the consistency of our brand, in PR, in marketing, in campaigns, offline, online. The whole brand topic.”

Did you generally focus more on offline or online marketing? Why?

“You have to think of scooters that way: Every company that has a software product has to become visually active and has to spend a lot of money to become visible. That is different in scooters, because these scooters are on the streets so you have the visibility already. That is sort of offline marketing. We paid a lot of attention to the app stores, that our app in the store represents our branding, just like you see it on the streets. And app store optimization, the screenshots and so on. We want everything you see, the total flow from the first time you see a scooter to the moment you open the app, to be consistent and good looking.”

I am going to list a few elements of a marketing strategy, please tell me which of these elements you incorporated in your marketing strategy:

Offline	Online
Print Ads “Not that I knew of.”	E-Mail Marketing “Not really, no. Besides the own newsletter.“
Flyers “We did in the beginning. We put voucher codes on the scooter for a free first ride.”	App/App Store Advertising “Of course. Yes.”
Merchandising (e.g. helmets) “Yes, we did.”	Push Notifications “Yes.”
TV Ads “No.”	Search Engine Advertising “In the beginning. I don’t know whether this is still being done.”
Sponsorships “Partnerships we did, but not sponsorships. But Co-Branding. Not on the scooters itself but in newsletters and such. But not so many. We did events. We were at green tech events, Formula E, everything that has to do with e-mobility, new tech, start-up events, those kind of things.”	Social Media Advertising: Instagram, Facebook, Twitter, YouTube, Snapchat, LinkedIn “Yes, we had launch campaigns. For example, you could register for Germany to get informed when we would launch in your city. To have a certain user adoption from the very first day on when we would start in a new city, we would advertise on Social Media a day before and people could register with their e-mail addresses and they would receive an install link to the app when we would

	launch in their city. That we did mostly on Facebook and Instagram.”
Partnerships with cities or other companies “Yes. We work together with cities and public transport a lot, BVG here in Berlin for example. As well with Wiener Linien I think, they have an app where you can find our scooters. In terms of other companies we have a cooperation with Sixt. We are integrated in Sixt. There is a whole team that takes care of integration and many different models exist.”	Geo Marketing “No, I don’t think so.”
Deals such as Promotion Codes or Special Offers „Yes.”	Influencer Marketing “Yes. On Instagram mostly.”

How is your marketing strategy helping to achieve your objectives as a company?

“That’s difficult to measure. Especially regarding branding. There are five different providers, or four, I don’t know how many are still active at the moment. Branding is the main source for users to decide between one or the other service, because the products are pretty similar. User research is obviously really important to see how the product is being accepted and how it comes across. Compared to the other providers I find [Company 2]’s branding very transparent. It aims at certain values: sustainability and cooperation with cities to achieve a new solution for mobility. Not being a toy for teenagers but a serious means of transportation. Trying to establish this as a product, that is taken seriously. It still should be fun using it. Communicating reliability was a strategy. When you use [Company 2], you have a scooter that works well, that is maintained well and one that really brings you to where you want to go, everything is transparent, it is green. Transparent in the sense of easy to understand and easily approachable.”

What were the biggest challenges in your marketing strategy?

“Marketing doesn’t play a big role because the users come anyways. The goal of the marketing strategy is not, to generate new users, but to create loyalty. Brand loyalty is way harder to create than a new user. The measure of brand loyalty is user retention. This we track via different indicators. For example in the app, how often the app is used, how often one person rides, how long the rides are. There are internal tools which track that. Via in-app push notifications we can try to incentivize the consumers or to reactivate them and thus drive customer loyalty. We were also thinking about a subscription model. Personally, I find that a good idea and I think it could work well. There is a company called Whim, they’re based in Helsinki, they should be present in Vienna soon. They operate with a subscription model. I find that quite interesting. They provide scooters, cabs, bikes. You can book different sizes of offerings, just like in these gym subscription models. I think that is a good way to catch heavy users. Especially in America you have Uber and Lyft as a comparison. If you look at them you can quite well see how long it takes for a company to get to that point. Because a subscription must be well thought through in order for it to work and to be accepted. I think it is quite a sensitive topic, you can't just roll something like this out. It might also withdraw a lot of revenue. So you have to be careful. But Uber and Lyft also launched it after a certain time and I think it just takes a little time before something like this comes. Exactly knowing where the price point it which works and is profitable. You would probably test it in one or two markets and then observe how the users behave.”

What were your biggest challenges associated with internationalization?

“Languages, definitely. You need really good translators and they are not easy to get. Many things were translated three or four times and then counterchecked again. The worst thing is if you have a certain brand and you want to communicate that brand but then translated it means something completely different or the content doesn’t come across as intended. And if you have many different levels, like the sticker on the scooter or the texts in the app store or the welcome email – there are plenty of touchpoints where language plays an important role. In some markets you can work with English but some markets are still super sensitive and demand their own language. And for those markets it is then really important that all texts are translated well. That was a pain point I would say. Generally communication: finding the right initiatives, the right companies with which you could maybe work together. You really need to get to know the market and find the right people to do that. Internationalization in terms of marketing holds many different strategies, depending on whether you have local teams, small teams, which report to the headquarter, or you manage everything from the headquarter in Berlin. Both has its advantages and disadvantages. I think when you operate with local teams the downside will always be that there is a barrier in communication and that these teams don’t feel connected to the work that is being done in headquarter. On the other hand, if you operate centralized you’re missing the direct line to the local market and you might be a little off with your campaigns. That is one of the biggest challenges I would say.”

Were there differences between the markets, did you need to adapt your marketing? If yes, in what elements did you adapt your marketing strategy and where did you standardize?

“The marketing offering we didn’t adapt, only the intensity I would say. The intensity was different, depending on the acceptance. Then priorities were simply adjusted. When you launch as many markets in a year as we did then you can move efforts from one side to the other, depending on which market needs attention at this very moment. There are two tails: either you try and push a market, or you leave it to itself, keep the involvement low, and focus on a market which is going well in order to position yourself well against the competition. When you notice that the willingness is high in the population and there is a lot of competition then you want to look good obviously. On the other hand, there might be markets where no competitor is present yet and they might bear a high potential. So it's always a thing of consideration and prioritising. The branding is completely standardised. I think there are some differences in the product, depending on the respective regulations, but I'm not sure with that.”

How did you allocate resources to your marketing activities?

“Branding is a strong focus. Everything that has to do with creative assets. Strategy is a strong focus as well. Since we didn’t do as much offline marketing, this obviously wasn’t a strong focus.”

Which resources did you usually rely on?

“Design I would say. Good designers, that can do many different things. Ones that create a video animation which you can A/B test quickly, in order to see what works better in the app store. Or ones that can design stickers, or helmets, or something else. Agile designers, who have a variety of skills are really important in our team. In a A/B test you launch an output and then you might think ‘Hm, maybe a video on the first screen in the app store is better.’ Because when you go to the app store and type in ‘scooter’ there are several results. And the first image might be a video, or a panorama picture divided in three images, or text, or an icon – all of this can be A/B tested. We switch the old with the new and observe whether it has a significant influence. These tests might take about one or two days, depending on how many users there are. You need a certain amount of users or downloads in order to test it. When we take Germany as a

market it works quicker of course than if you take a smaller country, where we are only present in one city. But I would say 24 hours on average.”

Did I miss anything? Is there one thing I did not ask that plays an important role in your marketing strategy building?

“Something that was always important to us were the safety topics and to communicate them. I think compared to other products, marketing for scooters is more a platform for communication, not to sell the product, but to reach a certain positioning and communicate a certain image. The branding topic was thus more important than the marketing itself. All the scooters on the streets count as tiny billboards. So you don’t need as much additional marketing to acquire new customers, but rather to sell what is behind all of that. We raise enough awareness for the first contact just by putting the scooter on the right places in the city. So you don’t need to call as much attention to yourself anymore by saying ‘Here we are!’ , but rather by saying ‘What are we?’ or ‘Why us and not the competitor?’ or ‘Why again us?’”

Company	Person	Position
2	C	Growth Marketing Manager, Senior Manager International Marketing

When was the company founded?

„The company was founded in 2018, in June. There are differences in what the actual founding date of [Company 2] is, that is an interesting observation actually to compare between the companies in this sector. There are little founding dates published. Everyone has their own definition. It's pretty interesting in the brand story , since some will the company was founded when they had the idea, the others would say it was when we went to the notary, the next say it was when we launched the first market, when we entered the company register, and so on.“

How many countries were you present in?

„I can't tell you an exact number but around 13.“

Which market was the first?

„Vienna, Austria.“

How did it happen you approached international markets? (proactive vs. reactive)

„Because it is a company? No, the scooter market is a pretty local market. The scooter market is being decided on locally. There are cities for scooters that are really important. From a straight up economical perspective. Even if smaller markets might work better, they are not profitable. So, the idea is to push expansion in order to save your share of the market. That's why you see six, seven providers in one city. It's about being the first ones, so you can win this market. It's too difficult to build up distinguishing features and customer value in hindsight through the app, the communication, through marketing. So, expansion is a race. You want to get your hands on a market quickly, because you have to be the first. Otherwise you'll be active in two, three markets and then that's it. But then you can't grow anymore. And then you have a freeze on recruitment and you're prone to go down when a city is being locked up by Corona or whatever. So, you hope to win masses by being the first, to save a market and to being less vulnerable. If you're not the first, then people are going to have a different app on their phone and distinguishing yourself is hard. At least with scooters. That's why many are integrating mopeds or trying to cooperate with public transport. With those kinds of things, you try and differentiate yourself from other brands. If a user downloaded a certain scooter app, this user will be using those exact scooters and no others, because the scooters are placed in similar locations and in similar quantity. I would hope it would be because of brand loyalty. But there are two important factors in mobility business: availability and proximity. So 'Is a scooter close to me?' – that is something that most scooter brands do equally well. Availability means 'Is the scooter ready to use?' So, whether it's charged and working and so on. Proximity describes whether the scooter is close enough to me to use it.“

Generally, what are your objectives?

„There are different ones. The overarching goal, the brand mission, the brand statement and what [Company 2] really is best in delivering is 'Change Mobility For Good'. So, it's about changing mobility and the way how we move in cities. We think mobility new. It's not only about how we move, how our mobility patterns look like but also what kind of vehicles it needs. So, no internal-combustion engines, no private possessions, but rather a common availability of mobility.“

What are your unique selling points?

„[Company 2] is a company that wants to make a positive impact on the environmental influences of mobility. Since the founding of the company we tried to strongly incorporate sustainability. The word ‘sustainability’ through all branches of the company. We don’t only see sustainability in terms of planting trees, which we do as well though, but also in terms of choosing a special way of maintaining the scooters and our operations model as a whole. That has the result that [Company 2] now has the best unit economics. Unit economics are the only factors that make scooters profitable. In the end, unit economics describe how often a scooter can be used or how often it is used. And this minus the maintenance costs are unit economics. It damages a scooter if you load it onto a vehicle and repair it. Keeping these costs low is the biggest lever for profit. That’s something that [Company 2] did very well from the beginning on. With the lowest starting capital, [Company 2] had the most efficient and steepest growth curve compared to competitors. The American providers, such as Lime, had 300 Mio. US-Dollars funding, meanwhile even more. [Company 2] started with 15 Mio. and is stronger than Lime in Europe by now. And that all can be traced back to the sustainability of the unit economics. We offer sustainability in being focused on the environment, in the operations, in IT. The over-arching goal is, to less be a scooter provider but more a platform for modern urban mobility. Being integrated in public transport, offering bikes. Maybe cars one day, who knows. Our concern is less to completely abandon cars but rather to think new how cars are constructed and how they are being used in city traffic. This I would say is our USP, although all competitors are trying the latter.” “You can measure unit economics by the minute. You don’t only look at the unit economics of one scooter but of all of them and you compare them between cities and countries. Then you notice that maybe it is more expensive in Berlin to maintenance a scooter than in Marseille. And then you have to look whether maybe Marseille is generally more profitable than Berlin. And in case Berlin is less profitable than Marseille, then you have to compare your overall costs. And then over a certain period of time you can determine whether a specific location pays off or doesn’t.”

What criteria did you use to evaluate your marketing performance? What was your measure of success?

„Quite quickly we came to the conclusion that you can’t evaluate marketing on the performance of the scooters. With marketing you have little influence on getting people to ride a scooter. It is all about availability and proximity. If you don’t have that you can do as much marketing as you want, it won’t matter. The scooter market is too undifferentiated in order to do any more than that. And if you did, you wouldn’t do yourself a favour, because any kind of marketing you’re doing is as good for you as for the competition. For example, Lime, the American provider, did a huge billboard advertisement for hundreds of thousands of Euros to strengthen the brand awareness for Lime. They would say it worked. It didn’t work. What happened was that awareness for all scooters increased, not just for Lime. In Berlin it was us who probably profited even more than Lime because there we have the benefit of being a German company, we were founded in Berlin, blabla. That is why we decided not to do any large marketing campaigns. The measure for marketing success is how many scooters we were able to put on the streets. In a certain location for example. And then you start many little marketing campaigns around this one location in order to get a certain action, a sign up for example. For example, a security training parkour in Vienna’s Inner City. And then every person who does the parkour receives a voucher for a sign up. These vouchers can be tracked so you can see who actually used it and whether the person used it only once or if it converted into an actual client. These kind of marketing campaigns actually though have a very small impact. You might be able to generate 300, 400 clients with something like this. What really made a strategically strong impact in [Company 2] is that we tried to draw the conversation away from scooters. That is, I think why [Company 2] today enjoys a pretty good reputation, besides the benefits that clients have from the actual scooters. Scooters are being criticized quite a lot. Many people like them, but many

also find them pretty stupid and think that cities are becoming even more cluttered by them and they ask themselves whether they are actually sustainable. We didn't expect people to engage in these topics as much as they did. So, we tried to pick up this conversation instead of ignoring it. We build content around these topics and spread it and that worked really well. You can track that in terms of engagement, reach etc. „Marketing and performance marketing measures success by amount of sign ups. We measured success in the kind of sentiment we got from our audience on social media. We looked at whether the discussions that were held around us were more positive or more negative.”

Were you successful in meeting these criteria?

„I would say yes. That doesn't yet mean though that it is profitable. And I think at the end of the day everybody has to decide for themselves how they measure success. You could say that a company isn't successful as long as it isn't profitable. If you take this measure, and I don't think this is an unfair measure, then you have to conclude that then also Uber and Amazon are not successful companies. I think, [Company 2] is successful because with the smallest funding, [Company 2] managed to gain acceptance in one of the toughest markets in Europe. And [Company 2] managed to become prevalent in some of the core cities in Europe.”

How did you develop your marketing strategy? *If not mentioned, ask:*

Who was involved in the decision-making process?

Did you look into marketing programs of your competitors and made things similar or different?

Did you involve learnings from your previous experience in building a marketing strategy? If so, what were these?

„Which people are involved in the decision-making process of the marketing strategy depends on what you are trying to do. The most important part in a communication strategy is that you involve all departments. All departments are connected with every single topic, with every issue. I received information from the C-Level on what is going on in the company at the moment and which goals are a current focus. I then get together every day with every department and talk through every single project. Back at my team we look at the data, we look at the objectives, the strategy. And then we build stories around that. We take our narrative, 'change mobility for good' and a collection of company values. And then we look to build stories that fuel our values, our company mission statement etc. After that is done, we decide on the channels we are going to use in order to spread the content and what kind of media we are going to use.“ “In the beginning we compared our strategies to our competitors, later not so much anymore. I always look at the competitors, always. But since my job was to tell the [Company 2]-Story and to make that interesting, I wasn't inspired by the competitors as much. The funny thing is that you get similar ideas anyways. Just because Lime did a safety video and [Company 3] and [Company 2] do the same that doesn't mean that I thought 'Oh, there are doing this, so I just jump on the bandwagon.' All scooter companies are data driven. And if there is a large political discussion then all of us can see that in our analytics and all of us are reacting on it. I tried not to look too much at the competition so I wouldn't be distracted too much but instead be able to focus on creating unique stories that underline the uniqueness of [Company 2]. But that's tricky. Let's not fake it. It's really tricky. Also, we're not saving children's lives. It's a scooter at the end of the day. I try to be self-conscious on this. You have to see everything in relation. Everybody is trying to do a good job, everybody is trying to tell a cool story, but the world keeps on turning without us just as well.”

Which elements of your marketing strategy do you think were innovative?

„I think what was innovative was that we completely ignored marketing from a certain point on. In the beginning we tried to stick to the classical ABC of performance marketing. Everything you are doing has to be quantitatively measurable, only data driven decisions. But if that's your goals your tools are very limited. The only thing you can do then is Unique Sign Up Vouchers, build Microsites, classic performance marketing stuff. But it turns that means that you're starting to spend 50,000 Euros on some online campaigns. If those then have only little effect, that's bad. You end up buying signups for 12 Euros each. That's not sustainable. I studied on an arts university, so I don't have the classic business, marketing kind of background. What worked well was that my manager was a designer. So, we said 'at [Company 2], everything should evolve around creative.' Our goal was that people, no matter whether it's one or 1000, if they saw something from [Company 2], would be able to find it good looking, transparent, understandable, exciting. Via creative formats we tried to engage people in a qualitative shift. The goal was that people would understand that [Company 2] isn't just about scooters. That is also a great point when discussions around sustainability, cluttered cities and such start. People should know that for us it is not only about scooters. For us, scooters are the entrance ticket to a greater change in mobility. We wanted people to engage only a second longer in order for them to understand this. They don't have to agree but if you achieved that you're relevant all of a sudden. The only way of gaining relevance in my opinion is if you manage to start a meaningful dialogue. And that on the other hand is hard to measure. But if you are able to establish that not everything has to be measurable, because you realize that the only relevant quantitative measures are proximity and availability, you are really starting new in your marketing strategy. And we eventually got to that point. I think we could have gotten there a lot quicker, but we didn't. Basically, the company had to realize for itself that this was the way to go. It is quite understandable that this takes a little while, because we're not operating with your own money. You may never forget that all this is investors' money. It's like if you gave me money right now so I would build you a house and what I did was to start painting. You'd probably be surprised and be like 'Hey, we talked about building, not painting!' Until you get to the point where you see that I am Michelangelo. So, it just takes a little while until you realize the worth of something that is not measurable. And from that point on, it worked for us.”

What differentiated your marketing strategy or your marketing campaigns from your main competitors?

„I what say what I described before. There are other providers who did this strategy similar to us, [Company 3], the Swedes, are really strong as well. They do a very good job. [Company 3] basically was the only other provider we really compared ourselves to. If we did a certain thing, [Company 3] would do the same two weeks later. Or if they did something then we probably did something similar shortly after. Because they just had really cool ideas. They did a virtual driver's license for scooters for example. That wasn't a big deal in the end, but it was a cool idea and the story behind it as well, and the design they worked out for it. Their whole storytelling is cool.”

Did you change your marketing strategy over time?

How and why did that happen?

„As I described before. In the beginning, our marketing was very performance-focused, very numbers-driven, data-based. If we had proceeded like that the marketing department needed to have been kicked out. You would have needed to fire all of them. When we moved away from the performance-based marketing to a more qualitatively based one, there were a lot of internal political fights. There were also changes in staff due to that. Not only due to that, but it played a role. There was quite a big transition from this very quantitative to this rather qualitative strategy of communication.”

Did you generally focus more on offline or online marketing? Why?

„In the end it was online only. We also did some offline once, I organised a roadshow. And we were part of a lot of panels. You go to a talk, you're at IAA, have a booth there, stuff like that. And we still do that.”

I am going to list a few elements of a marketing strategy, please tell me which of these elements you incorporated in your marketing strategy:

Offline	Online
Print Ads “No.”	E-Mail-Marketing “No, we didn’t. We did send out mailing to clients or push notifications.”
Flyers “Yes. It was a core element for a long time. It worked well to get people to sign up. It stopped working when the weather started to become badly and it also didn’t work to create loyal, returning customers. There are people driving around constantly to collect these vouchers. And if there are no vouchers, they won’t ride a scooter. So, at one point we said ‘No, we’re not going to do it like that.’”	App/App Store Advertising “No, I don’t think so.”
Merchandising (e.g. helmets) “Yes. [Company 2] has helmets, jackets, pullovers, we had that all. We primarily gave that to employees, that was Internal Branding. And you could also win it in raffles. It is too expensive to offer it to broad masses. If you want to give out a semi decent pullover which is not absolutely disgusting, then it simply costs too much money.”	Push Notifications <i>s.a.</i>
TV Ads “No. Way too expensive. We were on TV a lot though. We didn’t need TV ads because shows like Galileo and stuff came to us.”	Search Engine Advertising “Very little.”
Sponsorships „No. Very rarely there were one, two things we supported. But we had a policy that we weren’t sponsor of anything. Externally, we communicated that we did that in order to stay independent, internally it was just a matter of costs. What we did though was that whenever we were asked to sponsor something that we would instead offer scooters to them or that we would give them 100 free rides for the event. That we did often. But there were never paid sponsorships.”	Social Media Advertising: Instagram, Facebook, Twitter, YouTube, Snapchat, LinkedIn “Yes. LinkedIn, Instagram, Facebook. We had Twitter and we also had Youtube. But we didn’t have any paid promotion on there. For Twitter and Youtube we didn’t really have a strategy at all. We actually only used them to spread content from our Instagram and LinkedIn.”
Partnerships with cities or other companies “Yes. Very much. It is part of the core and expansion strategy to try working with every	Geo Marketing “For the longest time we weren’t allowed to do that for data privacy reasons. But you sort of do it anyways at the end of the day if you

public transport provider in every city. Public transport is really important for the reputation, it just sounds good when we say that we work together with the Wiener Linien. It is part of a lobbying strategy, but then you have one enemy less when it comes to regulations and such. We also work together with large enterprises, like Audi for example. By doing that we are able to gain a wide reach and awareness.”	do paid social. You do target but you never have actual client data. You only have little dots on a map, but you don’t know who that is.”
Deals such as Promotion Codes or Special Offers „Yes.“	Influencer Marketing “Yes. We did. It didn’t work well.”

How is your marketing strategy helping to achieve your objectives as a company?

„It helps because you have to critically think about all your ideas. You have to set certain goals. Only with a clear strategy you are able to reach your goals. It also helps you to justify your decisions. I’m not a big fan of that but it is part of the corporate game.”

What were the biggest challenges in your marketing strategy?

„The biggest challenge is to stay unique with what you communicate. Stay relevant. And, to look at the bigger picture, to generate value. Generate actual client value. It is difficult, because it is a seasonal business and it is characterized by hedonistic client behaviour. The exciting thing about the scooter business is that you really have to try hard to get loyal customers.”

What were your biggest challenges associated with internationalization?

„Finding good people. And onboarding. That is really difficult because the company grows so quickly. In my first week at [Company 2], I launched two countries and six cities. I didn’t even have an email address at that point. It is a huge challenge to be able to give people the opportunity to actually come to grips with the company and the business model. To build long-term strategies is basically impossible. A goal exists, generating as much revenue as possible, logically. But as soon as you plan something you are forced to do a one-eighty because for some reasons you have to change your strategy. That can be quite frustrating. You can’t rely on anything. What is said today counts nothing tomorrow.”

Were there differences between the markets, did you need to adapt your marketing? If yes, in what elements did you adapt your marketing strategy and where did you standardize?

„Yes, absolutely. The biggest difference is pricing. All [Company 2] rides cost 1 Euro to unlock and then 29 Cents per Minute. This price is very cheap in the Nordics, which is why [Company 2] works really well there. In Italy, Spain for example this pricing is rather high. Pricing can be a ‘make it or break it’. The goal could be to earn so much revenue in the Nordics that this can substitute countries like Spain and Italy. But nobody does that because if you did then your competitor would as well and then the market cannibalizes itself whilst not even being profitable as for now. So basically, all agreed on driving with one black eye. The other main difference are regulations. That is a painful topic. Regulations are different from city to city. Depending on the different regulations of the cities the marketing strategies are being adapted accordingly. You need to find the right ‘Global vs. Local’ balance. We tried to spread bold messages globally to build a strong brand and only choose local approaches when we really had to and when we would have time for that. It is all a matter of time. That’s why a strong global brand is really important. For example, we don’t have local social media accounts like [Company 2] Spain,

[Company 2] Germany or such because that way we would lose control. We deal with external money, so control is really important. We have to be able to justify every step we take.” “We have a good standing in Berlin and Germany. The German name was a fail in the end because it only works in Germany. Other countries were unsure how to pronounce the name. But in Germany it worked well. It was also a name to build a story around it. The name came from the old slogan which was ‘Follow your instincts’. That worked well because it told a story of movement and the instinct to move. “

How did you allocate resources to your marketing activities?

s.a.

Which resources did you usually rely on?

„Depends on how you look at it. We tried to do as much as possible ourselves and outsource as little as possible. So, I would say that the resource of employees was really important. Since we did so much ourselves, with our own people, who all identified with the company, we are able to build such a strong brand.” „We came from a very performance-based perspective. We tracked all data, all online discussions to receive information. We had a complete team of people who did just that. But the shift was that we completely split the Performance Marketing team from other Marketing people. And these other Marketing people then became the Growth team. And these people built stories, were designers, focused on the messages that [Company 2] communicated. We built our own creative agency. That was our USP.”

Did I miss anything? Is there one thing I did not ask that plays an important role in your marketing strategy building?

„No.“

Appendix B: Application of the EMICO framework

Dimension	Descriptors	Answer given by: Company 1
Entrepreneurial orientation	Research and development	<p>“We put the first scooters on the streets (...) but only as a trial in a few different markets. (...) What was put on them was ‘This is not a scooter’, just to test the technology and test how it works.”</p> <p>“There was a lot of time spent on scooter design. How do you make it more visible? You have to be able to see it.”</p>
	Speed to market	<p>“In [different cities] we had to figure out the regulatory situation and then obviously put these [scooters] on the ground as quickly as possible.”</p> <p>“(...) We noticed that it really makes a difference if you’re one of the first movers, (...) because people aren’t going to have more than two or three scooter apps on their phone.”</p> <p>“You have to do as much as you can as fast as you can, as quickly as possible, a crazy growth. So you can then emerge as one of [the] winners. The biggest one will get the most tenders from the cities. They will also get the most customers and they will also get the most partnerships which then becomes a self-reinforcing positive circle.”</p>
	Risk-taking	<p>“We tried lots of different things (...). We at some point tried just putting [the scooters] on the ground and it worked.”</p> <p>“Everybody [working in the company] had experience in other tech companies and other start-ups so everybody was bringing experience to the table. We had a lot of people working in the food delivery industry previously and they had a very certain way of thinking about re-ordering and how people interact with apps and so on. But it doesn’t necessarily translate directly to the scooter world.”</p> <p>“[In allocating resources to our marketing activities] I don’t think there was any kind of scientific research towards this, it was more like ‘Let’s allocate a small portion of the budget towards this, as a hedge’. The biggest part of the budget went into buying new scooters. A small amount would go into marketing activities, because we thought we needed to basically.”</p>
	Proactiveness	<p>“(...) There wasn’t a big focus on the right KPIs, because it was mostly about pure numbers of rides and growth and revenue run rates.”</p> <p>“There is also event-based marketing, like there is going to be a big football match, let’s put a hundred scooters outside. Sort of more opportunistic things, where you try to catch a certain wave that is happening.”</p> <p>“It was all about increasing rides and about being seen as the winner. It was about being the Go-To brand in peoples’ minds.”</p> <p>“In every country everything was almost completely different in regard to almost everything. The only common thing across all the countries was the application. Almost everything else had to be localized in at least some regard.”</p> <p>“(...) in many ways you try to standardize, across the brand and the imaging, the copy of the texts (...). But you also have to take advantage of local opportunities and also mitigate local issues as well.”</p> <p>“It was a really great group of people [working in the team]. A really fantastic group of people from a lot of different backgrounds working extremely long hours. I have never seen something where people were so motivated and passionate to not just win and to be the biggest scooter company but people really did believe to change the way people were moving in cities. And I think it’s a noble goal, that’s why we all went there.”</p>

		<p>“Yes, there was a lot of competition, we wanted to be the ones that did it. We didn’t want to be the ones that worked a hundred hours a year to be the footnote in history. We wanted to be the ones that made that change.”</p>
Market orientation	Exploiting markets	<p>“I don’t think [our marketing strategy changed over time] in any considered way. At one point we became more focused on trying not to show people riding without a helmet, trying to be more safety focused. But apart from that I don’t think there was any kind of real conscious change in strategy.”</p>
	Market intelligence generation	<p>“[When approaching international markets] we looked into lots of different variables on what might work. (...) There wasn’t really any proven variable for what really works. Probably the closest thing is just ‘Does the city have disposable income?’. (...) Tourism is also a major aspect. And also the bike infrastructure (...) makes a big difference. Also seasonality is an important one. I don’t think we ever got to manage to put together an actual scoring system with all these different variables, but I think it is some combination of seasonality, disposable income, cycle infrastructure and tourism.”</p> <p>“All of this marketing didn’t really have a clear strategy, because nobody knew how to do scooter marketing.”</p> <p>“You have to put the scooters in the right place at the right time (...). All the scooter companies will have a lot of data guys working on this.”</p> <p>“Nobody really spent a lot of time doing the work needed to properly analyse and to control test [promotion options]. (...) And that is fine because in the start-up world and in a new industry you don’t have time because everyone is working 15 hours a day anyways. (...) I think this battle was never resolved.”</p> <p>“Another thing which became big was referral benefits (...). This was used across the industry and was an understanding that people are using a scooter when they’re in front of it.”</p> <p>“(…) Growth was good, the rider numbers were crazy, but it’s very hard to (...) credit that to marketing, because there was never really an attribution model that worked.”</p> <p>“There was no real strategy because it all comes down to the fact that nobody really knew what worked and nobody had the data to back it up, so everything was a hypothesis and in that situation, you just hedge your bets.”</p> <p>“I wish there would have been a more scientific way. But unfortunately, there was such a lack of clarity around ‘What’s the ROI? Where would it make more sense?’. But there just wasn’t a really structured decision-making process in marketing. The time to test hypotheses that you need in order to understand where that money is going and where it is useful was just lacking.”</p>
	Responsiveness towards competition	<p>“There was a mad rush between all of us [scooter companies] to get these public transport partnerships.”</p> <p>“Across the whole industry there was never really a lot of time spend on these [marketing] topics, because everyone was trying to rush so fast (...) and most of what people did was just copying the competition and just try to keep up with the competition.”</p> <p>“I think there was no real difference between the European scooter guys. I think everybody was doing the same things.”</p> <p>“Very quickly in Europe [the marketing and communication of scooter companies] rotated around certain values (...). But everyone was doing the same thing, so I (...) don’t think anyone was being more innovative. Some did some kind of cool marketing stunts (...) but in general it was pretty aligned between everybody. (...) There was never a last thing advantage because everyone was copying everyone else.”</p>

		<p>“[Company 3], they would say that don’t do any online marketing, so their strategy works. But also, they have more money than everyone else and a larger span than everyone else, but also, they started a year earlier than everyone else, so it’s not a really fair comparison.”</p>
	Integration of business processes	<p>“We had a wild ride. (...) It was really just sending a load of guys to a country and be like ‘Hey, you are in this country now.’ (...) And it isn’t easy to launch a city or a country. (...) We would have to find a warehouse, which is the hardest part. Finding somewhere to put these [scooters], to charge them, hiring all the local drivers (...)”</p> <p>“(…) Most scooter companies had a very decentralised model or decision making. So you had central technology and central services but then you had local country managers and then each country manager had a group of city managers who were doing completely their own things. They were taking decisions and prioritising things and launching initiatives and training and hiring in completely different ways.”</p> <p>“[The biggest challenge in our marketing strategy was] how to split up the resources and should we invest anything in marketing.”</p>
	Networks and relationships	<p>“(…) We always wanted to first speak to the authorities before we launched anywhere. We thought it was very important to try and get their permission. We didn’t want to do the kind of ‘Uber-model’ where you just rush in and ask for forgiveness.”</p> <p>“(…) A big part was getting as close to public transport as possible, (...) because of (...) the idea that you could really prove the ‘Last Mile Concept’. (...) Everybody was obsessed with signing partnerships with the public transport operators.”</p> <p>“We focused on the security aspects more because partnerships with cities would be easier (...)”</p> <p>“There was always a lot of discussion around ‘Should we allow others to sponsor on us?’ because it can make a lot of money. I think some bike companies are doing this and they make quite a lot of money selling space (...). In the end, I don’t think we did any private partnerships. We did some co-branding with public transport on certain areas.”</p> <p>“[By cities] we wanted to be seen as important enough that cities would listen to us and would see that other people would like to use us.”</p>
Innovation orientation	Knowledge infrastructure	<p>“Marketing at some point also processes into operations and data science because you need to know where to put the scooters. You have the data to prove it that this location is good versus this street corner.”</p> <p>“Did we have all the data we needed for [marketing]? No. Do we have that even today? No.”</p>
	Propensity to innovate	<p>“[Our unique selling points were] investing in vehicle design. Efficient operations. Sustainability, focusing on being green for the environment and using green charging and this kind of stuff.”</p> <p>“What we would spend quite a lot of time working on (...) were different prime systems where you would pay a certain amount per month and you would get unlimited unlocks (...). I’m not sure whether we ever launched it.”</p> <p>“All of the European guys had almost the same strategy in terms of marketing across all channels and in terms of acquisition and reactivation.”</p> <p>“I think the [scooter] industry as a whole was being extremely innovative. The industry was really trying new things and trying to build something which has never been done before.”</p> <p>“It was a group of companies and a group of people and an environment that was totally new. Trying to figure out – while going a</p>

		hundred miles an hour – which strategy will work and how you can differentiate from the competition and whether or not it is even possible to differentiate yourself or if the customer even cares between the competition.”
Customer Orientation	Responsiveness towards customers	<p>“There is this idea that people aren’t going to have more than two or three scooter apps on their phone. So you have to be one of those two or three apps. (...) It really makes a difference if you’re one of the first mover, precisely for that reason that people have ‘app fatigue’.”</p> <p>“Being European, (...), investing in vehicle design, efficient operations, (...) sustainability. All of these were important (...) for consumers.”</p>
	Communication with customers	<p>“ (...) you need the network effect, that people recognize the brand, use the brand, refer the brand, refer to friends.”</p> <p>“You need a persistent brand which works across all countries and is quite recognizable. But then you have to be sensitive not only to the needs of each country but also to the circumstances of that particular moment in that country which changed on a monthly basis. So, you need the security to have local decision making supported by a central brand guidelines and decisions. I’m not sure we had that.”</p>
	Understanding and delivering customer value	<p>“There are two camps (...): you have those who say: ‘We don’t need to spend any money on marketing because we can just put our scooters on the ground and they’re going to be their own marketing. The second camp is ‘That’s not enough. Consumers at some point are actually going to care which brand they’re using and (...) will go for one scooter over another.’ (...) That battle was never resolved.”</p> <p>“We focused on the security aspects more because (...) we thought that safety will become an increasing thing for users because at some point users might have an accident or know someone who’s had an accident and we don’t want that to be a bad reputation for our scooters. (...) It was seen as important and not just the right thing to do but also as an important factor to build trust in the industry and in the company itself.”</p>
	Promotion and sales	<p>“I don’t think we formally sponsored anything except for mobility events (...). There is this yearly conference where the micro mobility people come and I think we were the sponsors as well as of other conferences. Certain cities would have a conference about mobility and we would sponsor it. But I don’t think we did any kind of real public sponsorship of anything. I think that would have come later down the line. We didn’t need to, to be honest, people were talking about us anyway. We were new, we were on the street, people were writing about us. So, it wasn’t really necessary at that time.”</p> <p>“We tried Facebook and Instagram and also Search Ads. App Store ads, promoted app rankings, to basically push people in that direction (...).”</p> <p>“Marketing to reactivate users was quite effective. We would send out SMS and push notifications and whatever offering free rides (...).”</p> <p>“[Search Engine Advertising] was not continued for a long time, but we did at one point. Because no one really searches for scooters. I think that was kind of the learning.”</p> <p>“We also did a bit of Influencer Marketing. I’m not sure how successful it was. Not in all cities, because again there was a kind of a localized approach and there was a local marketing for each country.”</p> <p>“Certain things don’t work, like, print ads don’t work, TV ads don’t work, but certain other things do.”</p>

Dimension	Descriptors	Answer given by: Company 2
Entrepreneurial orientation	Research and development	“(…) [Company 2] now has the best unit economics. Unit economics are the only factors that make scooters profitable. In the end, unit economics describe how often a scooter can be used or how often it is used. And this minus the maintenance costs are unit economics. It damages a scooter if you load it onto a vehicle and repair it. Keeping these costs low is the biggest lever for profit. That’s something that [company 2] did very well from the beginning on.”
	Speed to market	“…the idea is to push expansion in order to save your share of the market. (…) It's about being the first ones, so you can win this market. (…) expansion is a race.”
	Risk-taking	“In the beginning, our marketing was very performance-focused, very numbers-driven, data-based. When we moved away from the performance-based marketing to a more qualitatively based one, there were a lot of internal political fights. There were also changes in staff due to that. (…) There was quite a big transition from this very quantitative to this rather qualitative strategy of communication.”
	Proactiveness	“Our goal was to be market leader in Europe. That was the highest goal.” “[The marketing team grew] from one person to maybe 20. So of course the level of professionalism increased and as well the possibility to follow through the consistency of our brand, in PR, in marketing, in campaigns, offline, online. The whole brand topic.” “With the lowest starting capital, [company 2] had the most efficient and steepest growth curve compared to competitors. The American providers, such as [company 3], had 300 Mio. US-Dollars funding, meanwhile even more. [Company 2] started with 15 Mio. and is stronger than [company 3] in Europe by now.” “[Company 2] is successful because with the smallest funding, [company 2] managed to gain acceptance in one of the toughest markets in Europe. And [company 2] managed to become prevalent in some of the core cities in Europe.” “You need to find the right ‘Global vs. Local’ balance. We tried to spread bold messages globally to build a strong brand and only choose local approaches when we really had to and when we would have time for that. It is all a matter of time. That’s why a strong global brand is really important.”
Market orientation	Exploiting markets	“Within one year we expanded to more than 40 countries. And geographical growth was a goal as well.” “[Company 2] is some kind of niche business. It's not E-Commerce where it is about bringing the people through some kind of tunnel. Sure, it also is a part of it but it’s mostly about this first ride and then try to establish rhythm in the customers’ behaviour, by incentives, by trying to analyse the positioning of the scooters as detailed as possible to make it as easy as possible for the consumer to ride a scooter for the first time.” “To build long-term strategies is basically impossible. A goal exists, generating as much revenue as possible, logically. But as soon as you plan something you are forced to do a one-eighty because for some reasons you have to change your strategy. That can be quite frustrating. You can’t rely on anything. What is said today counts nothing tomorrow.”
	Market intelligence generation	“User research is obviously really important to see how the product is being accepted and how it comes across.”

		<p>“[User retention] we track via different indicators. For example in the app, how often the app is used, how often one person rides, how long the rides are. There are internal tools which track that.”</p> <p>“Generally communication [is a challenge]: finding the right initiatives, the right companies with which you could maybe work together. You really need to get to know the market and find the right people to do that.”</p> <p>“The measure for marketing success is how many scooters we were able to put on the streets.”</p> <p>“Marketing and performance marketing measure success by amount of sign ups. We measured success in the kind of sentiment we got from our audience on social media. We looked at whether the discussions that were held around us were more positive or more negative.”</p> <p>“The German name was a fail in the end because it only works in Germany. Other countries were unsure how to pronounce the name. But in Germany it worked well.”</p>
	<p>Responsiveness towards competition</p>	<p>“Competitor analysis is always important. You shouldn’t take it too serious though and put it as the main focus. But of course you look at the competition, to see how fast they are and to see what they do. It came down to days. How fast did Voi reach certain numbers, then we compared: Where we faster or slower? A kind of race.”</p> <p>“We also look at how the competitors reach their goals. For example we would look at where they positions their scooters, what kind of marketing they do, what kind of events they do.”</p> <p>“In the beginning we compared our strategies to our competitors, later not so much anymore. I always look at the competitors, always. But since my job was to tell the [company 2]-story and to make that interesting, I wasn’t inspired by the competitors as much. The funny thing is that you get similar ideas anyways. (...) I tried not to look too much at the competition so I wouldn’t be distracted too much but instead be able to focus on creating unique stories that underline the uniqueness of [company 2].”</p>
	<p>Integration of business processes</p>	<p>“The most important part in a communication strategy is that you involve all departments. All departments are connected with every single topic, with every issue. I received information from the C-Level on what is going on in the company at the moment and which goals are a current focus. I then get together every day with every department and talk through every single project. Back at my team we look at the data, we look at the objectives, the strategy. And then we build stories around that.”</p>
	<p>Networks and relationships</p>	<p>“It’s about (...) working together with these cities directly, in order to have a product that works as an addition to the public transport, not as a substitute.”</p> <p>“You could either offer scooters to companies so that their employees can try them or try any other way to reduce the hurdle that people download the app and ride a scooter for the first time.”</p> <p>“We work together with cities and public transport a lot, BVG here in Berlin for example. As well with Wiener Linien I think, they have an app where you can find our scooters. In terms of other companies we have a cooperation with Sixt. We are integrated in Sixt. There is a whole team that takes care of integration and many different models exist.”</p> <p>“It is part of the core and expansion strategy to try working with every public transport provider in every city. Public transport is really important for the reputation, it just sounds good when we say that we work together with the Wiener Linien. It’s part of a lobbying strategy, but then you have one enemy less when it comes to regulations (...).”</p>

Innovation orientation	Knowledge infrastructure	-
	Propensity to innovate	<p>“What was innovative at [company 2] was that we used new channels. But I think the innovation in marketing is a mix between product and technology. We worked together a lot with our product team and tried to use as many synergetic effects between tech and marketing as possible. We also adjusted the product to lessons we learned from marketing insights. You call that User Centric Marketing and User Centric Product Development.”</p> <p>“The overarching goal, the brand mission, the brand statement and what [company 2] really is best in delivering is ‘Change Mobility For Good’. It’s about changing mobility and the way how we move in cities. We think mobility new. It’s not only about how we move, how our mobility patterns look like but also what kind of vehicles it needs. No internal-combustion engines, no private possession, but rather a common availability of mobility.”</p> <p>“[Company 2] is a company that wants to make a positive impact on the environmental influences of mobility. Since the founding of the company we tried to strongly incorporate sustainability. The word ‘sustainability’ through all branches of the company. We don’t only see sustainability in terms of planting trees, which we do as well though, but also in terms of choosing a special way of maintaining the scooters and our operations model as a whole. That has the result that [company 2] now has the best unit economics. Unit economics are the only factors that make scooters profitable.”</p> <p>“We offer sustainability in being focused on the environment, in the operations, in IT. The over-arching goal is, to less be a scooter provider but more a platform for modern urban mobility. Being integrated in public transport, offering bikes. Maybe cars one day, who knows. Our concern is less to completely abandon cars but rather to think new how cars are constructed and how they are being used in city traffic. This I would say is our USP.”</p> <p>“(…) What was innovative was that we completely ignored [performance] marketing from a certain point on. In the beginning we tried to stick to the classical ABC of performance marketing. Everything you are doing has to be quantitatively measurable, only data driven decisions. But if that’s your goal your tools are very limited. The only thing you can do then is (…) classic performance marketing stuff. But it turns that means that you’re starting to spend 50,000 Euros on some online campaigns. If those then have only little effect, that’s bad.”</p> <p>“We said ‘at [company 2], everything should evolve around creative.’ Our goal was that people, no matter whether it’s one or 1000, if they saw something from [company 2], would be able to find it good looking, transparent, understandable, exciting. Via creative formats we tried to engage people in a qualitative shift. The goal was that people would understand that [company 2] isn’t just about scooters. (…) For us, scooters are the entrance ticket to a greater change in mobility. (…) The only way of gaining relevance in my opinion is if you manage to start a meaningful dialogue. And that on the other hand is hard to measure. But if you are able to establish that not everything has to be measurable, because you realize that the only relevant quantitative measures are proximity and availability, you are really starting new in your marketing strategy. (…) It just takes a little while until you realize the worth of something that is not measurable. And from that point on, it worked for us.”</p>

		<p>“We tracked all data, all online discussions, to receive information. We had a complete team of people who did just that. But the shift was that we completely split the Performance Marketing team from other Marketing people. And these other Marketing people then became the Growth team. And these people built stories, were designers, focused on the messages that [company 2] communicated. We built our own creative agency. That was our USP.”</p>
Customer Orientation	Responsiveness towards customers	<p>“User research is obviously really important to see how the product is being accepted and how it comes across.”</p> <p>“The goal of the marketing strategy is not to generate new users, but to create loyalty. Brand loyalty is way harder to create than a new user. The measure of brand loyalty is user retention.”</p> <p>“Design [is a resource we rely on]. Good designers (...) who create a video animation which you can A/B test quickly, in order to see what works better in the app store.”</p> <p>“Scooters are being criticized quite a lot. Many people like them, but many also find them pretty stupid and think that cities are becoming even more cluttered by them and they ask themselves whether they are actually sustainable. We didn’t expect people to engage in these topics as much as they did. So, we tried to pick up this conversation instead of ignoring it. We build content around these topics and spread it and that worked really well. You can track that in terms of engagement, reach, etc.”</p>
	Communication with customers	<p>“Communicating reliability was a strategy. When you use [company 2], you have a scooter that works well, that is maintained well and one that really brings you to where you want to go, everything is transparent, it is green.”</p> <p>“Languages, definitely [are the biggest challenge associated with internationalization]. (...) The worst thing is if you have a certain brand and you want to communicate that brand but then translated it means something completely different or the content doesn’t come across as intended. And if you have many different levels, like the sticker on the scooter or the texts in the app store or the welcome email – there are plenty of touchpoints where language plays an important role.”</p> <p>“Something that was always important to us were the safety topics and to communicate them. I think compared to other products, marketing for scooters is more a platform for communication, not to sell the product, but to reach a certain positioning and communicate a certain image. The branding topic was thus more important than the marketing itself. All the scooters on the streets count as tiny billboards. So you don’t need as much additional marketing to acquire new customers, but rather to sell what is behind all of that. We raise enough awareness for the first contact just by putting the scooters on the right places in the city. So you don’t need to call as much attention to yourself anymore by saying ‘Here we are!’ , but rather by saying ‘What are we?’ or ‘Why us and not the competitor?’ or ‘Why again us?’”</p>
	Understanding and delivering customer value	<p>“At [company 2], all operations are being handled by professional employees, who were trained for that specific job, who did the maintenance, break tests, etc. So there was a certain operations excellence, which was important to guarantee a certain level of quality.”</p> <p>“What differentiated our marketing strategy from our competitors was also authenticity, a good customer service, and that everything, that involves the customer, offers a good customer experience. This good customer experience was also what we wanted to reflect in our marketing. Especially on LinkedIn for example we</p>

		<p>showed, what is going on at [company 2] and what matters to us at the moment.”</p> <p>“Branding is the main source for users to decide between one or the other service, because the products are pretty similar.”</p> <p>“It's too difficult to build up distinguishing features and customer value in hindsight through the app, the communication, through marketing.”</p> <p>“(…) You try and differentiate yourself from other brands. If a user downloaded a certain scooter app, this user will be using those exact scooters and no others, because the scooters are placed in similar locations and in similar quantity. I would hope it would be because of brand loyalty.”</p> <p>“There are two important factors in mobility business: availability and proximity. (…) Availability means ‘Is the scooter ready to use?’ So, whether it's charged and working (…). Proximity describes whether the scooter is close enough to me to use it.”</p> <p>“It is all about availability and proximity. If you don't have that you can do as much marketing as you want, it won't matter. The scooter market is too undifferentiated in order to do any more than that. And if you did, you wouldn't do yourself a favour, because any kind of marketing you're doing is as good for you as for the competition.”</p> <p>“The biggest challenge is to stay unique with what you communicate. Stay relevant. And, to look at the bigger picture, to generate value. Generate actual customer value. It's difficult, because it's a seasonal business and it's characterized by hedonistic client behaviour. The exciting thing about the scooter business is that you really have to try hard to get loyal customers.”</p>
	<p>Promotion and sales</p>	<p>“[The target group] can be bought quite quickly, through ads or by just putting the scooters on the streets.”</p> <p>“We paid attention a lot to branding. We have a clear, coherent style and a clear, coherent communication throughout all channels. I think this consistency, a certain straightforwardness, is important for a high level of recognition.”</p> <p>“We paid a lot of attention to the app stores, that our app in the store represents our branding, just like you see it on the streets. And app store optimization, the screenshots and so on. We want everything you see, the total flow from the first time you see a scooter to the moment you open the app, to be consistent and good looking.”</p> <p>“We did events. We were at green tech events, Formula E, everything that has to do with e-mobility, new tech, start-up events, those kind of things.”</p> <p>“To have a certain user adoption from the very first day on when we would start in a new city, we would advertise on Social Media a day before and people could register with their e-mail addresses and they would receive an install link to the app when we would launch in their city.”</p> <p>“Compared to the other providers I find [company 2]'s branding very transparent. It aims at certain values: sustainability and cooperation with cities to achieve a new solution for mobility. Not being a toy for teenagers but a serious means of transportation. Trying to establish this as a product, that is taken seriously.”</p> <p>“Via in-app push notifications we can try to incentivize the consumers or to reactivate them and thus drive customer loyalty.”</p> <p>“We were also thinking about a subscription model. (…) I think that is a good way to catch heavy users.”</p> <p>“(…) You start many little marketing campaigns around this one location in order to get a certain action, a sign up for example. For example, a security training parkour in Vienna's Inner City. And then every person who does the parkour receives a voucher for a</p>

	<p>sign up. These vouchers can be tracked so you can see who actually used it and whether the person used it only once or if it converted into an actual client. These kind of marketing campaigns actually though have a very small impact. You might be able to generate 300, 400 clients with something like this.”</p> <p>“(…) I organised a roadshow. And we were part of a lot of panels. You go to a talk, you’re at IAA, have a booth there (…).”</p> <p>“[Flyers] worked well to get people to sign up. It stopped working when the weather started to become badly and it also didn’t work to create loyal, returning customers.”</p> <p>“We didn’t need TV ads because shows like Galileo and stuff came to us.”</p> <p>“We had a policy that we weren’t sponsor of anything. Externally, we communicated that we did that in order to stay independent, internally it was just a matter of costs.”</p> <p>“We didn’t have any paid promotion on [Social Media]. For Twitter and Youtube we didn’t really have a strategy at all. We actually only used them to spread content from our Instagram and LinkedIn.”</p> <p>“We did [Influencer Marketing]. It didn’t work well.”</p>
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Q1 Welche der folgenden E-Scooteranbieter sind Ihnen ein Begriff? Mehrfachnennungen möglich.

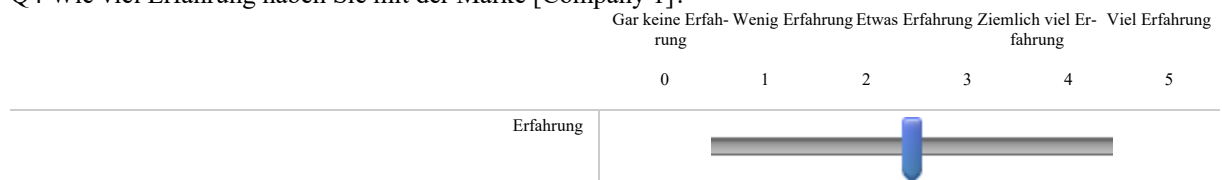
- [Company 1]
- [Company 2]
- [Company 3]
- [Company 4]
- [Company 5]
- Keine der oben genannten

Option 1: [Company 1]

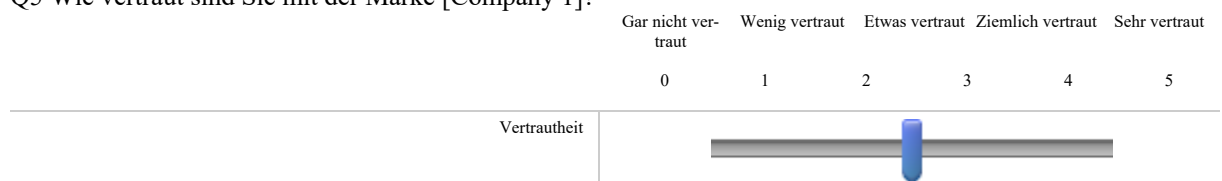
Q3 Welche Farben hat der E-Scooter von [Company 1]?

- Orange/Schwarz
- Blau/Grün
- Schwarz/Weiß

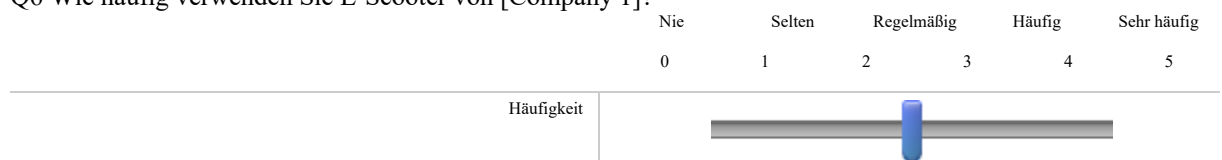
Q4 Wie viel Erfahrung haben Sie mit der Marke [Company 1]?



Q5 Wie vertraut sind Sie mit der Marke [Company 1]?



Q6 Wie häufig verwenden Sie E-Scooter von [Company 1]?



Q7 Mein Gesamteindruck von [Company 1] ist...

	1	2	3	4	5	
Extrem schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem gut
Extrem unvorteilhaft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem vorteilhaft
Extrem unbefriedigend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem befriedigend

Q8 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich bin der Marke [Company 1] treu	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist meine erste Wahl wenn es um E-Scooter geht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde andere Marken verwenden, wenn [Company 1] verfügbar ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde [Company 1] anderen Nutzern empfehlen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Gesprächen mit Freunden rede ich gut über [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde nicht nach [Company 1] suchen, wenn [Company 1] nicht direkt verfügbar wäre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin zufrieden mit der Anwendung von [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin mit meiner allgemeinen Erfahrung mit [Company 1] zufrieden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q9 [Company 1]...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...ist konsistent in der Qualität	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ist technisch gut gemacht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...funktioniert konsistent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ist vernünftig bepreist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...hat ein gutes Preis-Leistungs-Verhältnis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q10 Wieviel Euro sind Sie bereit zu zahlen für eine Fahrt mit einem [Company 1] E-Scooter, die **eine Minute** dauert?

0 € 0.5 € 1 € 1.5 € 2 €

Preis in Euro	
---------------	--

Q11 [Company 1] ist eine Marke...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...die mir Spaß macht zu fahren	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...bei der ich entspannt bin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die mir Freude bereitet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
[Company 1] verbessert die Art und Weise, wie ich wahrgenommen werde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn ich [Company 1] fahre, macht das einen guten Eindruck auf andere Leute	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist eine Marke, die soziale Verantwortung übernimmt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist besser für die Gesellschaft als andere E-Scooter Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] bietet praktische Lösungen für meine Bedürfnisse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich darauf, dass [Company 1] mir immer neuartige Lösungen anbieten wird, die für mich relevant sind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] schafft es, neue Lösungen für die Bedürfnisse von Kunden zu bieten	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q13 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich weiß viel über [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin darüber informiert, was [Company 1] alles anbietet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke kritisch, wenn ich mit [Company 1] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke pragmatisch, wenn ich mit [Company 1] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich werde neugierig, wenn ich mit [Company 1] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich werde verspielt, wenn ich mit [Company 1] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin mit anderen Nutzern von [Company 1] vernetzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich interagiere mit anderen Nutzern von [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q14 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich bin ein Fan von [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich liebe [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich vertraue [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich darauf, dass [Company 1] meine Bedürfnisse erfüllt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich auf [Company 1], wenn ich ihre Dienstleistungen in Anspruch nehmen möchte	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mein Ziel ist es, [Company 1] zu einem Erfolg zu machen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin angespornt, [Company 1] zu einem Erfolg zu machen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q15 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
[Company 1] verwendet unterschiedlichste Kommunikationskanäle, um mit seinen Nutzern zu kommunizieren	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] steht in regelmäßigem Informationsaustausch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] informiert mich klar und deutlich über seine Dienste	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] legt Preisauskünfte offen dar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] legt Informationen zur Firma transparent offen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] versorgt mich zeitgerecht mit Informationen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q16 [Company 1] ist eine Marke, die...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...eine Vergangenheit hat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...zeitlos ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die Trends überlebt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...mich nicht im Stich lässt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die ihre Werteverprechen einhält	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ehrlich ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...an ihre Kunden zurückgibt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...moralische Grundsätze hat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...zu ihren moralischen Werten steht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...sich um ihre Kunden kümmern	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...dem Leben von Menschen Bedeutung hinzufügt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...wichtige Werte widerspiegelt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q17 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Stimme nicht zu	Stimme eher nicht zu	Weder noch	Stimme eher zu	Stimme zu
Ich reagiere wohlwollend auf die Werbung von [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich reagiere positiv auf die Werbung von [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Die Werbungen von [Company 1] sind gut	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] verbringt viel Zeit, um seine Kunden kennenzulernen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] fragt seine Kunden, wie zufrieden sie mit den Dienstleistungen von [Company 1] sind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q18 Stellen Sie sich folgendes Szenario vor:

[Company 1] hat eine Kooperation mit dem U-Bahn-/Bus-/Straßenbahnanbieter Ihrer Stadt. In Zukunft kann man die E-Scooter von [Company 1] auch über die App des U-Bahn-/Bus-/Straßenbahnanbieters ausleihen.

Bitte bewerten Sie die folgenden Aussagen in Bezug auf diese Kooperation.
Auf die Kooperation von [Company 1] reagiere ich...

Gar nicht wohlwollend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr wohlwollend
Sehr negativ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr positiv
Sehr schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr gut

Q19 Stellen Sie sich folgendes Szenario vor:

[Company 1] hat eine Kooperation mit einer großen Autovermietung. In Zukunft kann man die E-Scooter von [Company 1] auch über die App der Autovermietung ausleihen.

Bitte bewerten Sie die folgenden Aussagen in Bezug auf diese Kooperation.
Auf die Kooperation von [Company 1] reagiere ich...

Gar nicht wohlwollend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr wohlwollend
Sehr negativ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr positiv
Sehr schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Seht gut

Q20 Gerne würden wir Sie einige weitere Fragen zu [Company 1] E-Scootern fragen. Wir schätzen dazu Ihre Meinung.

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Das Problem jedes Kunden ist [Company 1] wichtig	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] versucht jedem Kunden das Gefühl zu geben, als sei er der einzige Kunde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist bekannt für seine Aufmerksamkeit gegenüber Kunden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] hat Persönlichkeit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist interessant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich habe ein klares Bild im Kopf von der Person, die [Company 1] benutzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] unterscheidet sich von anderen E-Scooter-Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] sticht gegenüber anderer E-Scooter-Marken hervor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist einzigartig im Vergleich zu anderen E-Scooter-Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q21 Hinsichtlich des Designs von [Company 1] E-Scootern, wie ist Ihre Meinung zu den folgenden Aspekten:

	Stimme nicht zu	Stimme eher nicht zu	Weder noch	Stimme eher zu	Stimme zu
[Company 1] sieht stylish aus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] sieht schön aus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 1] zieht meine Aufmerksamkeit auf sich	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 1] hilft mir, die Marke zu erkennen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 1] gefällt mir	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 1] spiegelt wider, wer ich als Mensch bin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] sieht aus als wäre es sehr benutzerfreundlich	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] sieht aus als wäre es un-gefährlich, es zu benutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] sieht aus als wäre es ein-fach zu verwenden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q22 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Für mich ist [Company 1] eine globale Marke	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke, dass Konsumenten im Ausland [Company 1] benutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] wird weltweit benutzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q23 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich versuche nicht von Firmen zu kaufen, die stark die Umwelt verschmutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn möglich wähle ich immer das Produkt, das am besten für die Umwelt ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn ich die Wahl zwischen zwei gleichen Produkten habe, frage ich mich immer, welches am wenigsten die Umwelt verschmutzt, bevor ich es kaufe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Umweltschutz spielt für mich eine große Rolle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1]s Bemühungen für die Umwelt sind wichtig	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] widmet sich stark seiner ökologischen Verantwortung	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist gegenüber der Umwelt sehr verantwortungsbewusst	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E-Scooter sind für mich von großer Bedeutung	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q24 Bitte geben Sie uns ein paar kurze Angaben zu Ihrer Person.

Geschlecht:

- Männlich
 Weiblich

Q25 Alter:

Q26 Höchste abgeschlossene Ausbildung:

- Pflichtschule
 Höher-bildende Schule ohne Matura/Abitur
 Höher-bildende Schule mit Matura/Abitur
 Lehre/Ausbildung
 Universität/Fachhochschule

Option 2: [Company 2]

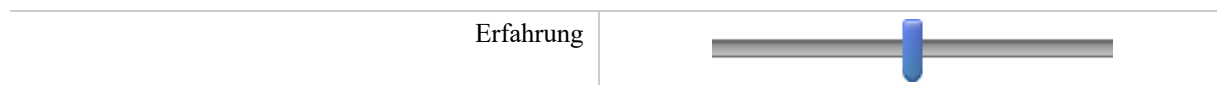
Q28 Welche Farben hat der E-Scooter von [Company 2]?

- Orange/Weiß
- Blau/Grün
- Schwarz/Weiß

Q29 Wie viel Erfahrung haben Sie mit der Marke [Company 2]?

Gar keine Erfahrung Wenig Erfahrung Etwas Erfahrung Ziemlich viel Erfahrung Viel Erfahrung

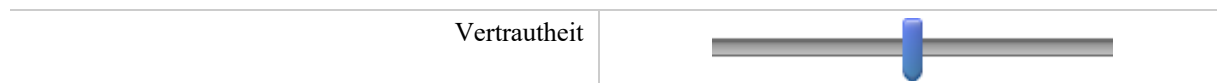
0 1 2 3 4 5



Q30 Wie vertraut sind Sie mit der Marke [Company 2]?

Gar nicht vertraut Wenig vertraut Etwas vertraut Ziemlich vertraut Sehr vertraut

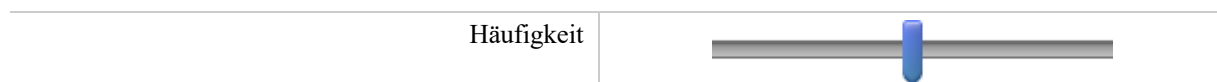
0 1 2 3 4 5



Q31 Wie häufig verwenden Sie E-Scooter von [Company 2]?

Nie Selten Regelmäßig Häufig Sehr häufig

0 1 2 3 4 5



Q32 Mein Gesamteindruck von [Company 2] ist...

	1	2	3	4	5	
Extrem schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem gut
Extrem unvorteilhaft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem vorteilhaft
Extrem unbefriedigend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem befriedigend

Q33 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich bin der Marke [Company 2] treu	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist meine erste Wahl wenn es um E-Scooter geht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde andere Marken verwenden, wenn [Company 2] verfügbar ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde [Company 2] anderen Nutzern empfehlen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Gesprächen mit Freunden rede ich gut über [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde nicht nach [Company 2] suchen, wenn [Company 2] nicht direkt verfügbar wäre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin zufrieden mit der Anwendung von [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich mit meiner allgemeinen Erfahrung mit [Company 2] zufrieden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q34 [Company 2]...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...ist konsistent in der Qualität	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ist technisch gut gemacht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...funktioniert konsistent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ist vernünftig bepreist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...hat ein gutes Preis-Leistungs-Verhältnis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q35 Wieviel Euro sind Sie bereit zu zahlen für eine Fahrt mit einem [Company 2] E-Scooter, die eine Minute dauert?

0 € 0.5 € 1 € 1.5 € 2 €

Preis in Euro	
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Q36 [Company 2] ist eine Marke...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...die mir Spaß macht zu fahren	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...bei der ich entspannt bin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die mir Freude bereitet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q37 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
[Company 2] verbessert die Art und Weise, wie ich wahrgenommen werde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn ich [Company 2] fahre, macht das einen guten Eindruck auf andere Leute	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist eine Marke, die soziale Verantwortung übernimmt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist besser für die Gesellschaft als andere E-Scooter Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] bietet praktische Lösungen für meine Bedürfnisse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich darauf, dass [Company 2] mir immer neuartige Lösungen anbieten wird, die für mich relevant sind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] schafft es, neue Lösungen für die Bedürfnisse von Kunden zu bieten	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q38 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich weiß viel über [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin darüber informiert, was [Company 2] alles anbietet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke kritisch, wenn ich mit [Company 2] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke pragmatisch, wenn ich mit [Company 2] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich werde neugierig, wenn ich mit [Company 2] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich werde verspielt, wenn ich mit [Company 2] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin mit anderen Nutzern von [Company 2] vernetzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich interagiere mit anderen Nutzern von [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q39 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich bin ein Fan von [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich liebe [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich vertraue [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich darauf, dass [Company 2] meine Bedürfnisse erfüllt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich auf [Company 2], wenn ich ihre Dienstleistungen in Anspruch nehmen möchte	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mein Ziel ist es, [Company 2] zu einem Erfolg zu machen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin angespornt, [Company 2] zu einem Erfolg zu machen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q40 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
[Company 2] verwendet unterschiedlichste Kommunikationskanäle, um mit seinen Nutzern zu kommunizieren	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] steht in regelmäßigem Informationsaustausch mit seinen Nutzern	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] informiert mich klar und deutlich über seine Dienste	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] legt Preisauskünfte offen dar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] legt Informationen zur Firma transparent offen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] versorgt mich zeitgerecht mit Informationen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q41 [Company 2] ist eine Marke, die...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...eine Vergangenheit hat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...zeitlos ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die Trends überlebt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...mich nicht im Stich lässt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die ihre Wertversprechen einhält	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ehrlich ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...an ihre Kunden zurückgibt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...moralische Grundsätze hat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...zu ihren moralischen Werten steht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...sich um ihre Kunden kümmern	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...dem Leben von Menschen Bedeutung hinzufügt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...wichtige Werte widerspiegelt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q42 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Stimme nicht zu	Stimme eher nicht zu	Weder noch	Stimme eher zu	Stimme zu
Ich reagiere wohlwollend auf die Werbung von [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich reagiere positiv auf die Werbung von [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Die Werbungen von [Company 2] sind gut	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] verbringt viel Zeit, um seine Kunden kennenzulernen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] fragt seine Kunden, wie zufrieden sie mit den Dienstleistungen von [Company 2] sind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q43 Stellen Sie sich folgendes Szenario vor:

[Company 2] hat eine Kooperation mit dem U-Bahn-/Bus-/Straßenabahnanbieter Ihrer Stadt. In Zukunft kann man die E-Scooter von [Company 2] auch über die App des U-Bahn-/Bus-/Straßenabahnanbieters ausleihen.

Bitte bewerten Sie die folgenden Aussagen in Bezug auf diese Kooperation. Auf die Kooperation von [Company 2] reagiere ich...

Gar nicht wohlwollend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr wohlwollend
Sehr negativ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr positiv
Sehr schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr gut

Q44 Stellen Sie sich folgendes Szenario vor:

[Company 2] hat eine Kooperation mit einer großen Autovermietung. In Zukunft kann man die E-Scooter von [Company 2] auch über die App der Autovermietung ausleihen.

Bitte bewerten Sie die folgenden Aussagen in Bezug auf diese Kooperation. Auf die Kooperation von [Company 2] reagiere ich...

Gar nicht wohlwollend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr wohlwollend
Sehr negativ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr positiv
Sehr schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr gut

Q45 Gerne würden wir Sie einige weitere Fragen zu [Company 2] E-Scootern fragen. Wir schätzen dazu Ihre Meinung.

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Das Problem jedes Kunden ist [Company 2] wichtig	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] versucht jedem Kunden das Gefühl zu geben, als sei er der einzige Kunde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist bekannt für seine Aufmerksamkeit gegenüber Kunden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] hat Persönlichkeit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist interessant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich habe ein klares Bild im Kopf von der Person, die [Company 2] benutzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] unterscheidet sich von anderen E-Scooter-Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] sticht gegenüber anderer E-Scooter-Marken hervor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist einzigartig im Vergleich zu anderen E-Scooter-Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q46 Hinsichtlich des Designs von [Company 2] E-Scootern, wie ist Ihre Meinung zu den folgenden Aspekten:

	Stimme nicht zu	Stimme eher nicht zu	Weder noch	Stimme eher zu	Stimme zu
[Company 2] sieht stylish aus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] sieht schön aus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 2] zieht meine Aufmerksamkeit auf sich	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 2] hilft mir, die Marke zu erkennen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 2] gefällt mir	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 2] spiegelt wider, wer ich als Mensch bin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] sieht aus als wäre es sehr benutzerfreundlich	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] sieht aus als wäre es un-gefährlich, es zu benutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] sieht aus als wäre es ein-fach zu verwenden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q47 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Für mich ist [Company 2] eine globale Marke	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke, dass Konsumenten im Ausland [Company 2] benutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] wird weltweit benutzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q48 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich versuche nicht von Firmen zu kaufen, die stark die Umwelt verschmutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn möglich wähle ich immer das Produkt, das am besten für die Umwelt ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn ich die Wahl zwischen zwei gleichen Produkten habe, frage ich mich immer, welches am wenigsten die Umwelt verschmutzt, bevor ich es kaufe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Umweltschutz spielt für mich eine große Rolle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2]s Bemühungen für die Umwelt sind wichtig	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] widmet sich stark seiner ökologischen Verantwortung	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist gegenüber der Umwelt sehr verantwortungsbewusst	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E-Scooter sind für mich von großer Bedeutung	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q49 Bitte geben Sie uns ein paar kurze Angaben zu Ihrer Person.

Geschlecht:

- Männlich
- Weiblich

Q50 Alter:

Q51 Höchste abgeschlossene Ausbildung:

- Pflichtschule
- Höher-bildende Schule ohne Matura/Abitur
- Höher-bildende Schule mit Matura/Abitur
- Lehre/Ausbildung
- Universität/Fachhochschule

Appendix C: Quantitative Questionnaire

Q1 Welche der folgenden E-Scooteranbieter sind Ihnen ein Begriff? Mehrfachnennungen möglich.

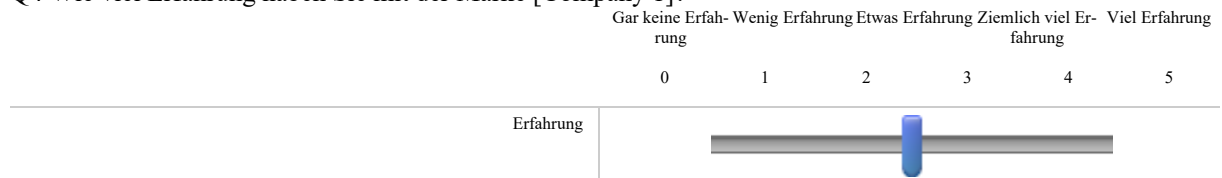
- [Company 1]
- [Company 2]
- [Company 3]
- [Company 4]
- [Company 5]
- Keine der oben genannten

Option 1: [Company 1]

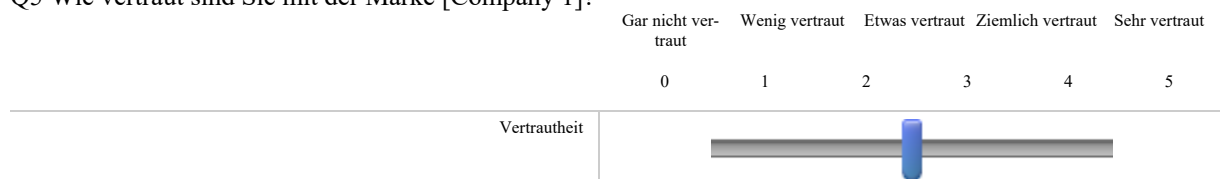
Q3 Welche Farben hat der E-Scooter von [Company 1]?

- Orange/Schwarz
- Blau/Grün
- Schwarz/Weiß

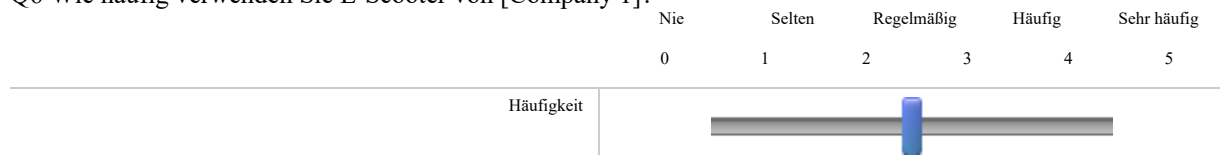
Q4 Wie viel Erfahrung haben Sie mit der Marke [Company 1]?



Q5 Wie vertraut sind Sie mit der Marke [Company 1]?



Q6 Wie häufig verwenden Sie E-Scooter von [Company 1]?



Q7 Mein Gesamteindruck von [Company 1] ist...

	1	2	3	4	5	
Extrem schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem gut
Extrem unvorteilhaft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem vorteilhaft
Extrem unbefriedigend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem befriedigend

Q8 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich bin der Marke [Company 1] treu	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist meine erste Wahl wenn es um E-Scooter geht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde andere Marken verwenden, wenn [Company 1] verfügbar ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde [Company 1] anderen Nutzern empfehlen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Gesprächen mit Freunden rede ich gut über [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde nicht nach [Company 1] suchen, wenn [Company 1] nicht direkt verfügbar wäre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin zufrieden mit der Anwendung von [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin mit meiner allgemeinen Erfahrung mit [Company 1] zufrieden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q9 [Company 1]...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...ist konsistent in der Qualität	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ist technisch gut gemacht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...funktioniert konsistent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ist vernünftig bepreist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...hat ein gutes Preis-Leistungs-Verhältnis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q10 Wieviel Euro sind Sie bereit zu zahlen für eine Fahrt mit einem [Company 1] E-Scooter, die **eine Minute** dauert?

0 € 0.5 € 1 € 1.5 € 2 €

Preis in Euro	
---------------	--

Q11 [Company 1] ist eine Marke...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...die mir Spaß macht zu fahren	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...bei der ich entspannt bin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die mir Freude bereitet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
[Company 1] verbessert die Art und Weise, wie ich wahrgenommen werde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn ich [Company 1] fahre, macht das einen guten Eindruck auf andere Leute	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist eine Marke, die soziale Verantwortung übernimmt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist besser für die Gesellschaft als andere E-Scooter Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] bietet praktische Lösungen für meine Bedürfnisse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich darauf, dass [Company 1] mir immer neuartige Lösungen anbieten wird, die für mich relevant sind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] schafft es, neue Lösungen für die Bedürfnisse von Kunden zu bieten	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q13 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich weiß viel über [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin darüber informiert, was [Company 1] alles anbietet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke kritisch, wenn ich mit [Company 1] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke pragmatisch, wenn ich mit [Company 1] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich werde neugierig, wenn ich mit [Company 1] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich werde verspielt, wenn ich mit [Company 1] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin mit anderen Nutzern von [Company 1] vernetzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich interagiere mit anderen Nutzern von [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q14 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich bin ein Fan von [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich liebe [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich vertraue [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich darauf, dass [Company 1] meine Bedürfnisse erfüllt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich auf [Company 1], wenn ich ihre Dienstleistungen in Anspruch nehmen möchte	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mein Ziel ist es, [Company 1] zu einem Erfolg zu machen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin angespornt, [Company 1] zu einem Erfolg zu machen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q15 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
[Company 1] verwendet unterschiedlichste Kommunikationskanäle, um mit seinen Nutzern zu kommunizieren	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] steht in regelmäßigem Informationsaustausch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] informiert mich klar und deutlich über seine Dienste	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] legt Preisauskünfte offen dar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] legt Informationen zur Firma transparent offen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] versorgt mich zeitgerecht mit Informationen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q16 [Company 1] ist eine Marke, die...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...eine Vergangenheit hat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...zeitlos ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die Trends überlebt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...mich nicht im Stich lässt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die ihre Wertversprechen einhält	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ehrlich ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...an ihre Kunden zurückgibt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...moralische Grundsätze hat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...zu ihren moralischen Werten steht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...sich um ihre Kunden kümmern	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...dem Leben von Menschen Bedeutung hinzufügt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...wichtige Werte widerspiegelt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q17 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Stimme nicht zu	Stimme eher nicht zu	Weder noch	Stimme eher zu	Stimme zu
Ich reagiere wohlwollend auf die Werbung von [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich reagiere positiv auf die Werbung von [Company 1]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Die Werbungen von [Company 1] sind gut	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] verbringt viel Zeit, um seine Kunden kennenzulernen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] fragt seine Kunden, wie zufrieden sie mit den Dienstleistungen von [Company 1] sind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q18 Stellen Sie sich folgendes Szenario vor:

[Company 1] hat eine Kooperation mit dem U-Bahn-/Bus-/Straßenbahnanbieter Ihrer Stadt. In Zukunft kann man die E-Scooter von [Company 1] auch über die App des U-Bahn-/Bus-/Straßenbahnanbieters ausleihen.

Bitte bewerten Sie die folgenden Aussagen in Bezug auf diese Kooperation.
Auf die Kooperation von [Company 1] reagiere ich...

Gar nicht wohlwollend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr wohlwollend
Sehr negativ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr positiv
Sehr schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr gut

Q19 Stellen Sie sich folgendes Szenario vor:

[Company 1] hat eine Kooperation mit einer großen Autovermietung. In Zukunft kann man die E-Scooter von [Company 1] auch über die App der Autovermietung ausleihen.

Bitte bewerten Sie die folgenden Aussagen in Bezug auf diese Kooperation.
Auf die Kooperation von [Company 1] reagiere ich...

Gar nicht wohlwollend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr wohlwollend
Sehr negativ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr positiv
Sehr schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Seht gut

Q20 Gerne würden wir Sie einige weitere Fragen zu [Company 1] E-Scootern fragen. Wir schätzen dazu Ihre Meinung.

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Das Problem jedes Kunden ist [Company 1] wichtig	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] versucht jedem Kunden das Gefühl zu geben, als sei er der einzige Kunde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist bekannt für seine Aufmerksamkeit gegenüber Kunden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] hat Persönlichkeit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist interessant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich habe ein klares Bild im Kopf von der Person, die [Company 1] benutzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] unterscheidet sich von anderen E-Scooter-Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] sticht gegenüber anderer E-Scooter-Marken hervor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist einzigartig im Vergleich zu anderen E-Scooter-Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q21 Hinsichtlich des Designs von [Company 1] E-Scootern, wie ist Ihre Meinung zu den folgenden Aspekten:

	Stimme nicht zu	Stimme eher nicht zu	Weder noch	Stimme eher zu	Stimme zu
[Company 1] sieht stylish aus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] sieht schön aus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 1] zieht meine Aufmerksamkeit auf sich	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 1] hilft mir, die Marke zu erkennen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 1] gefällt mir	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 1] spiegelt wider, wer ich als Mensch bin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] sieht aus als wäre es sehr benutzerfreundlich	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] sieht aus als wäre es un-gefährlich, es zu benutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] sieht aus als wäre es ein-fach zu verwenden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q22 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Für mich ist [Company 1] eine globale Marke	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke, dass Konsumenten im Ausland [Company 1] benutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] wird weltweit benutzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q23 Bitte bewerten Sie die folgenden Aussagen über [Company 1].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich versuche nicht von Firmen zu kaufen, die stark die Umwelt verschmutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn möglich wähle ich immer das Produkt, das am besten für die Umwelt ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn ich die Wahl zwischen zwei gleichen Produkten habe, frage ich mich immer, welches am wenigsten die Umwelt verschmutzt, bevor ich es kaufe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Umweltschutz spielt für mich eine große Rolle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1]s Bemühungen für die Umwelt sind wichtig	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] widmet sich stark seiner ökologischen Verantwortung	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 1] ist gegenüber der Umwelt sehr verantwortungsbewusst	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E-Scooter sind für mich von großer Bedeutung	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q24 Bitte geben Sie uns ein paar kurze Angaben zu Ihrer Person.

Geschlecht:

- Männlich
 Weiblich

Q25 Alter:

Q26 Höchste abgeschlossene Ausbildung:

- Pflichtschule
 Höher-bildende Schule ohne Matura/Abitur
 Höher-bildende Schule mit Matura/Abitur
 Lehre/Ausbildung
 Universität/Fachhochschule

Option 2: [Company 2]

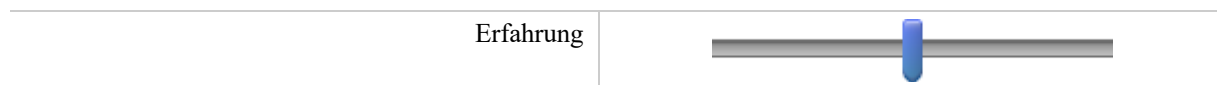
Q28 Welche Farben hat der E-Scooter von [Company 2]?

- Orange/Weiß
- Blau/Grün
- Schwarz/Weiß

Q29 Wie viel Erfahrung haben Sie mit der Marke [Company 2]?

Gar keine Erfahrung Wenig Erfahrung Etwas Erfahrung Ziemlich viel Erfahrung Viel Erfahrung

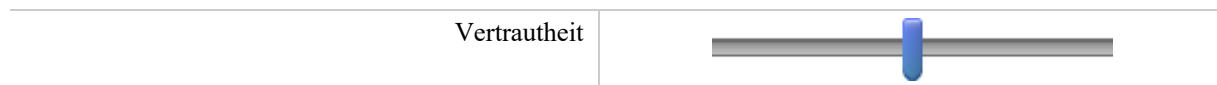
0 1 2 3 4 5



Q30 Wie vertraut sind Sie mit der Marke [Company 2]?

Gar nicht vertraut Wenig vertraut Etwas vertraut Ziemlich vertraut Sehr vertraut

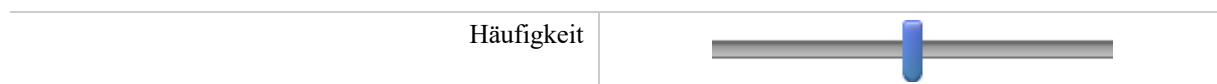
0 1 2 3 4 5



Q31 Wie häufig verwenden Sie E-Scooter von [Company 2]?

Nie Selten Regelmäßig Häufig Sehr häufig

0 1 2 3 4 5



Q32 Mein Gesamteindruck von [Company 2] ist...

	1	2	3	4	5	
Extrem schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem gut
Extrem unvorteilhaft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem vorteilhaft
Extrem unbefriedigend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extrem befriedigend

Q33 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich bin der Marke [Company 2] treu	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist meine erste Wahl wenn es um E-Scooter geht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde andere Marken verwenden, wenn [Company 2] verfügbar ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde [Company 2] anderen Nutzern empfehlen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Gesprächen mit Freunden rede ich gut über [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich würde nicht nach [Company 2] suchen, wenn [Company 2] nicht direkt verfügbar wäre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin zufrieden mit der Anwendung von [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich mit meiner allgemeinen Erfahrung mit [Company 2] zufrieden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q34 [Company 2]...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...ist konsistent in der Qualität	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ist technisch gut gemacht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...funktioniert konsistent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ist vernünftig bepreist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...hat ein gutes Preis-Leistungs-Verhältnis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q35 Wieviel Euro sind Sie bereit zu zahlen für eine Fahrt mit einem [Company 2] E-Scooter, die eine Minute dauert?

0 € 0.5 € 1 € 1.5 € 2 €

Preis in Euro	
---------------	--

Q36 [Company 2] ist eine Marke...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...die mir Spaß macht zu fahren	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...bei der ich entspannt bin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die mir Freude bereitet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q37 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
[Company 2] verbessert die Art und Weise, wie ich wahrgenommen werde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn ich [Company 2] fahre, macht das einen guten Eindruck auf andere Leute	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist eine Marke, die soziale Verantwortung übernimmt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist besser für die Gesellschaft als andere E-Scooter Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] bietet praktische Lösungen für meine Bedürfnisse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich darauf, dass [Company 2] mir immer neuartige Lösungen anbieten wird, die für mich relevant sind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] schafft es, neue Lösungen für die Bedürfnisse von Kunden zu bieten	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q38 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich weiß viel über [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin darüber informiert, was [Company 2] alles anbietet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke kritisch, wenn ich mit [Company 2] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke pragmatisch, wenn ich mit [Company 2] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich werde neugierig, wenn ich mit [Company 2] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich werde verspielt, wenn ich mit [Company 2] fahre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin mit anderen Nutzern von [Company 2] vernetzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich interagiere mit anderen Nutzern von [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q39 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich bin ein Fan von [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich liebe [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich vertraue [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich darauf, dass [Company 2] meine Bedürfnisse erfüllt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich verlasse mich auf [Company 2], wenn ich ihre Dienstleistungen in Anspruch nehmen möchte	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mein Ziel ist es, [Company 2] zu einem Erfolg zu machen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich bin angespornt, [Company 2] zu einem Erfolg zu machen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q40 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
[Company 2] verwendet unterschiedlichste Kommunikationskanäle, um mit seinen Nutzern zu kommunizieren	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] steht in regelmäßigem Informationsaustausch mit seinen Nutzern	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] informiert mich klar und deutlich über seine Dienste	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] legt Preisauskünfte offen dar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] legt Informationen zur Firma transparent offen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] versorgt mich zeitgerecht mit Informationen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q41 [Company 2] ist eine Marke, die...

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
...eine Vergangenheit hat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...zeitlos ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die Trends überlebt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...mich nicht im Stich lässt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...die ihre Werteverprechen einhält	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...ehrlich ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...an ihre Kunden zurückgibt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...moralische Grundsätze hat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...zu ihren moralischen Werten steht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...sich um ihre Kunden kümmern	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...dem Leben von Menschen Bedeutung hinzufügt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...wichtige Werte widerspiegelt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q42 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Stimme nicht zu	Stimme eher nicht zu	Weder noch	Stimme eher zu	Stimme zu
Ich reagiere wohlwollend auf die Werbung von [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich reagiere positiv auf die Werbung von [Company 2]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Die Werbungen von [Company 2] sind gut	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] verbringt viel Zeit, um seine Kunden kennenzulernen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] fragt seine Kunden, wie zufrieden sie mit den Dienstleistungen von [Company 2] sind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q43 Stellen Sie sich folgendes Szenario vor:

[Company 2] hat eine Kooperation mit dem U-Bahn-/Bus-/Straßenabahnanbieter Ihrer Stadt. In Zukunft kann man die E-Scooter von [Company 2] auch über die App des U-Bahn-/Bus-/Straßenabahnanbieters ausleihen.

Bitte bewerten Sie die folgenden Aussagen in Bezug auf diese Kooperation. Auf die Kooperation von [Company 2] reagiere ich...

Gar nicht wohlwollend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr wohlwollend
Sehr negativ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr positiv
Sehr schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr gut

Q44 Stellen Sie sich folgendes Szenario vor:

[Company 2] hat eine Kooperation mit einer großen Autovermietung. In Zukunft kann man die E-Scooter von [Company 2] auch über die App der Autovermietung ausleihen.

Bitte bewerten Sie die folgenden Aussagen in Bezug auf diese Kooperation. Auf die Kooperation von [Company 2] reagiere ich...

Gar nicht wohlwollend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr wohlwollend
Sehr negativ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr positiv
Sehr schlecht	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Sehr gut

Q45 Gerne würden wir Sie einige weitere Fragen zu [Company 2] E-Scootern fragen. Wir schätzen dazu Ihre Meinung.

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Das Problem jedes Kunden ist [Company 2] wichtig	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] versucht jedem Kunden das Gefühl zu geben, als sei er der einzige Kunde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist bekannt für seine Aufmerksamkeit gegenüber Kunden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] hat Persönlichkeit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist interessant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich habe ein klares Bild im Kopf von der Person, die [Company 2] benutzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] unterscheidet sich von anderen E-Scooter-Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] sticht gegenüber anderer E-Scooter-Marken hervor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist einzigartig im Vergleich zu anderen E-Scooter-Marken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q46 Hinsichtlich des Designs von [Company 2] E-Scootern, wie ist Ihre Meinung zu den folgenden Aspekten:

	Stimme nicht zu	Stimme eher nicht zu	Weder noch	Stimme eher zu	Stimme zu
[Company 2] sieht stylish aus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] sieht schön aus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 2] zieht meine Aufmerksamkeit auf sich	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 2] hilft mir, die Marke zu erkennen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 2] gefällt mir	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Das Design von [Company 2] spiegelt wider, wer ich als Mensch bin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] sieht aus als wäre es sehr benutzerfreundlich	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] sieht aus als wäre es un-gefährlich, es zu benutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] sieht aus als wäre es ein-fach zu verwenden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q47 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Für mich ist [Company 2] eine globale Marke	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ich denke, dass Konsumenten im Ausland [Company 2] benutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] wird weltweit benutzt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q48 Bitte bewerten Sie die folgenden Aussagen über [Company 2].

	Trifft nicht zu	Trifft eher nicht zu	Weder noch	Trifft eher zu	Trifft zu
Ich versuche nicht von Firmen zu kaufen, die stark die Umwelt verschmutzen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn möglich wähle ich immer das Produkt, das am besten für die Umwelt ist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wenn ich die Wahl zwischen zwei gleichen Produkten habe, frage ich mich immer, welches am wenigsten die Umwelt verschmutzt, bevor ich es kaufe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Umweltschutz spielt für mich eine große Rolle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2]s Bemühungen für die Umwelt sind wichtig	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] widmet sich stark seiner ökologischen Verantwortung	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Company 2] ist gegenüber der Umwelt sehr verantwortungsbewusst	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E-Scooter sind für mich von großer Bedeutung	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q49 Bitte geben Sie uns ein paar kurze Angaben zu Ihrer Person.

Geschlecht:

- Männlich
- Weiblich

Q50 Alter:

Q51 Höchste abgeschlossene Ausbildung:

- Pflichtschule
- Höher-bildende Schule ohne Matura/Abitur
- Höher-bildende Schule mit Matura/Abitur
- Lehre/Ausbildung
- Universität/Fachhochschule

Appendix D: German Abstract

Obwohl in der Literatur die möglichen Beweggründe der unternehmerischen Globalisierung durchaus untersucht wurden, erhielt Marketing im Zusammenhang mit Born Globals wenig Aufmerksamkeit. Das Ziel der vorliegenden Studie ist es, zur Theorie des Unternehmerischen Marketing beizutragen. Dies wird aus der Perspektive von früh global expandierenden Unternehmen in einer von gering differenzierten Produkten geprägten Industrie getan. Ziel ist es, die Marketingstrategien zweier B2C Born Globals – wobei eines der Unternehmen erfolgreich, das andere erfolglos ist – auf Basis des EMICO-Modells zu vergleichen. In einer darauffolgenden quantitativen Studie werden jene Elemente des EMICO-Modells, die Einfluss auf die Markenloyalität von Kunden haben, spezifiziert. Die Ergebnisse zeigen, dass Unterschiede sowohl zwischen den Marketingstrategien der beiden verglichenen Unternehmen, als auch zwischen den verfolgten Marketingstrategien und den eigentlichen Kundenbedürfnissen vorliegen. Trotz der Unterschiede zwischen den beiden Unternehmen stellt die größte Herausforderung für beide dar, Markenloyalität zu generieren. Die quantitativen Ergebnisse zeigen, dass Bemühungen in der Kundenorientierung, speziell hinsichtlich der Kommunikation der Einzigartigkeit der Marke, in einem B2C Born Global Umfeld die größte Varianz in der Markenloyalität erklären. Die Studie trägt demnach zu der Diskussion über Markenloyalität und Differenzierungsstrategien von B2C Born Globals in kompetitiven Märkten bei. Durch die Limitierung der Literatur von Born Globals auf Unternehmen, welche lediglich in Nischenmärkten aktiv sind, wurde diese Diskussion bisher vernachlässigt. Des weiteren trägt diese Studie zur Theorie bei, indem sie die Marketingstrategien von B2C Born Globals durch die Einbeziehung von Unternehmens- als auch Konsumentenperspektive untersucht.

Schlüsselwörter

Born Globals / Unternehmerisches Marketing / EMICO-Modell / Markenloyalität / Differenzierungsstrategie

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Figures

EMICO framework		
Orientation	Dimension	Description
Entrepreneurial Orientation	Research and development	Level of emphasis on investment in R&D; technological leadership and innovation.
	Speed to market	Stance of the firm; competitive, collaborative; follower; leader; defensive.
	Risk-taking	Calculated risk taking; preparedness to seize opportunities; preference for both incremental and transformational acts; reliance on intuition and experience.
	Proactiveness	Commitment to exploiting opportunities; inherent focus of recognition of opportunities; passion; zeal and commitment.
Market Orientation	Exploiting markets	Vision and strategy are driven by tactical successes; planning, or lack of, in short incremental steps; proactively exploiting smaller market niches; flexible, customization approach to market; marketing decisions linked to personal goals and long term performance.
	Market intelligence generation	External intelligence gathering; informal market research generation; gathering marketing intelligence through personal contact networks and web based-networks.
	Responsiveness towards competitors	Reactive to competitor's new products; niche marketing strategies; differentiation strategies using product quality; software innovation; quality and responsiveness of software service support; competitive advantage based on understanding of customer needs.
	Integration of business processes	Closely integrated functions; R&D, marketing etc.; sharing of resources; product/venture development is interactive; formal processes; project planning/management; marketing that permeates all levels and functional areas of the firm.
	Networks and relationships	Resource leveraging; capacity for building network and business competence; use of personal contact networks; creation of value through relationships/alliances; intra-firm networks; market decision making based on daily contact and networks.
Innovation Orientation	Knowledge infrastructure	Formalized IT-based knowledge infrastructures; formal and informal policies, procedures, practices and incentives; gathering and disseminating information.
	Propensity to innovate	Processes for sustaining and shaping the organization's culture to stimulate and sustain creativity and innovation; covering all innovation types – new product, services, process and administration.
Customer Orientation	Responsiveness towards customers	Responsiveness to customer feedback and behavior; speedy reaction to shifts in customer preference.
	Communication with customers	Strives to lead customers; formal and 'informal' feedback gathering mechanisms; ongoing dialogue with customers to build long term relationships; successful delivery to customers that builds customer confidence, with marketing based on personal reputation, trust and credibility.

	Understanding and delivering customer value	Organization driven by customer satisfaction; understanding of how customers value products/services; closely linked to innovation practices; often two-way marketing with customers; customer knowledge often based on marketing immersion/interaction.
	Promotion and sales	Organizational focus on sales and promotional activities.

Table 17: EMICO framework

Source: Jones et al., 2013.

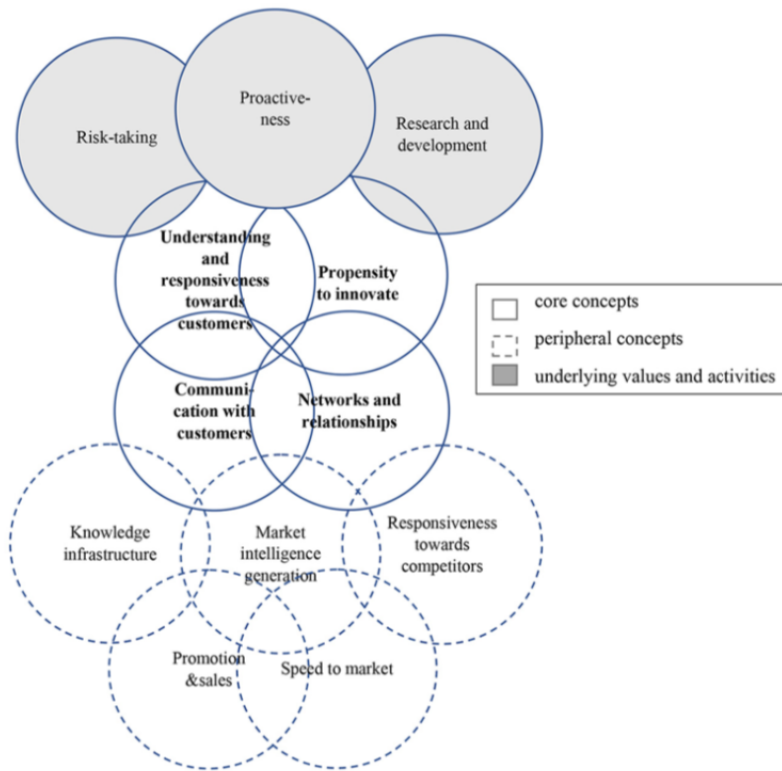


Table 18: Hierarchy of EMICO dimensions in B2B BGs

Source: Kowalik & Danik, 2019, p. 785.

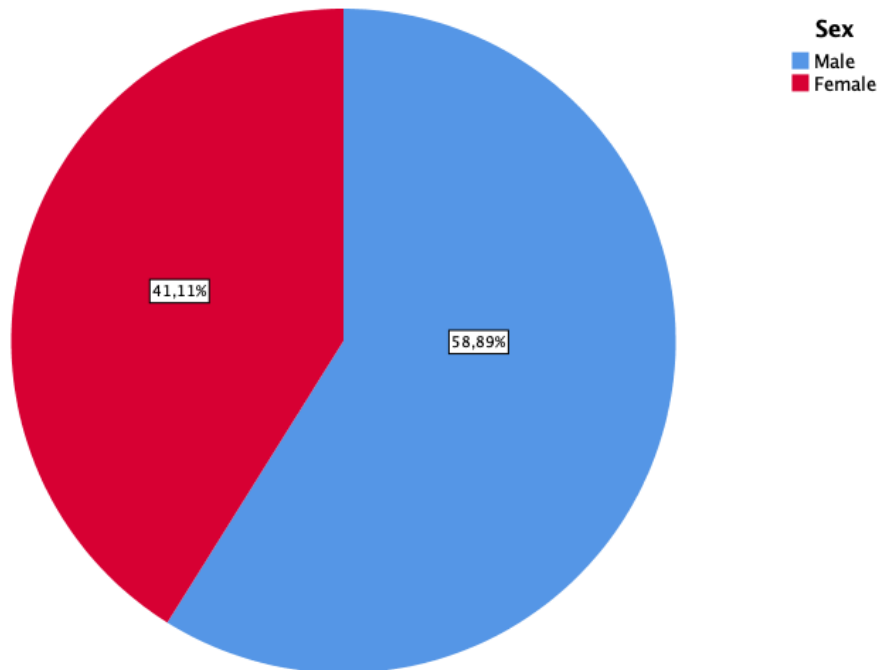


Figure 7: Distribution of respondents' sex

Source: Own elaboration.

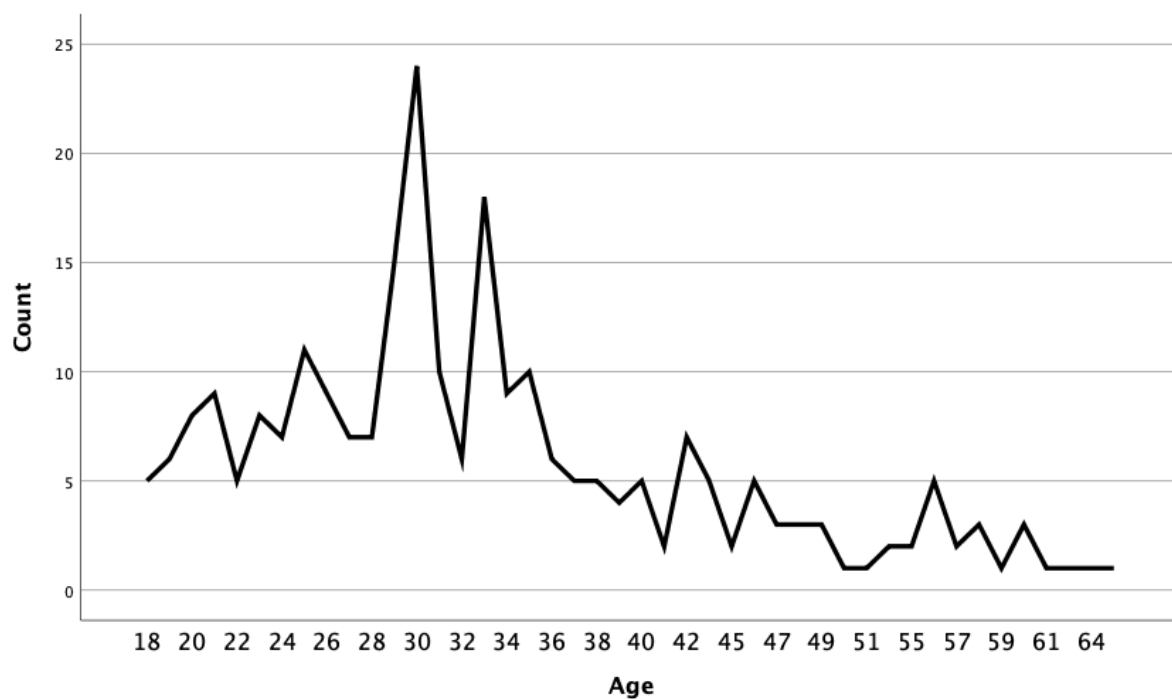


Figure 8: Distribution of respondents' age

Source: Own elaboration.

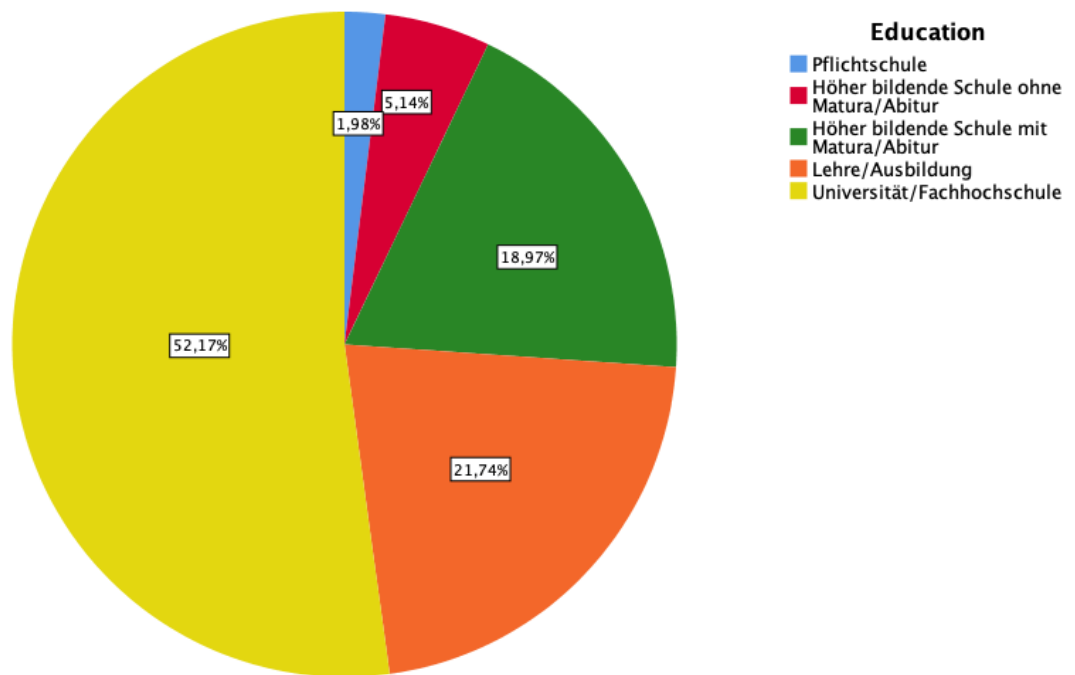


Figure 9: Distribution of respondents' education

Source: Own elaboration.

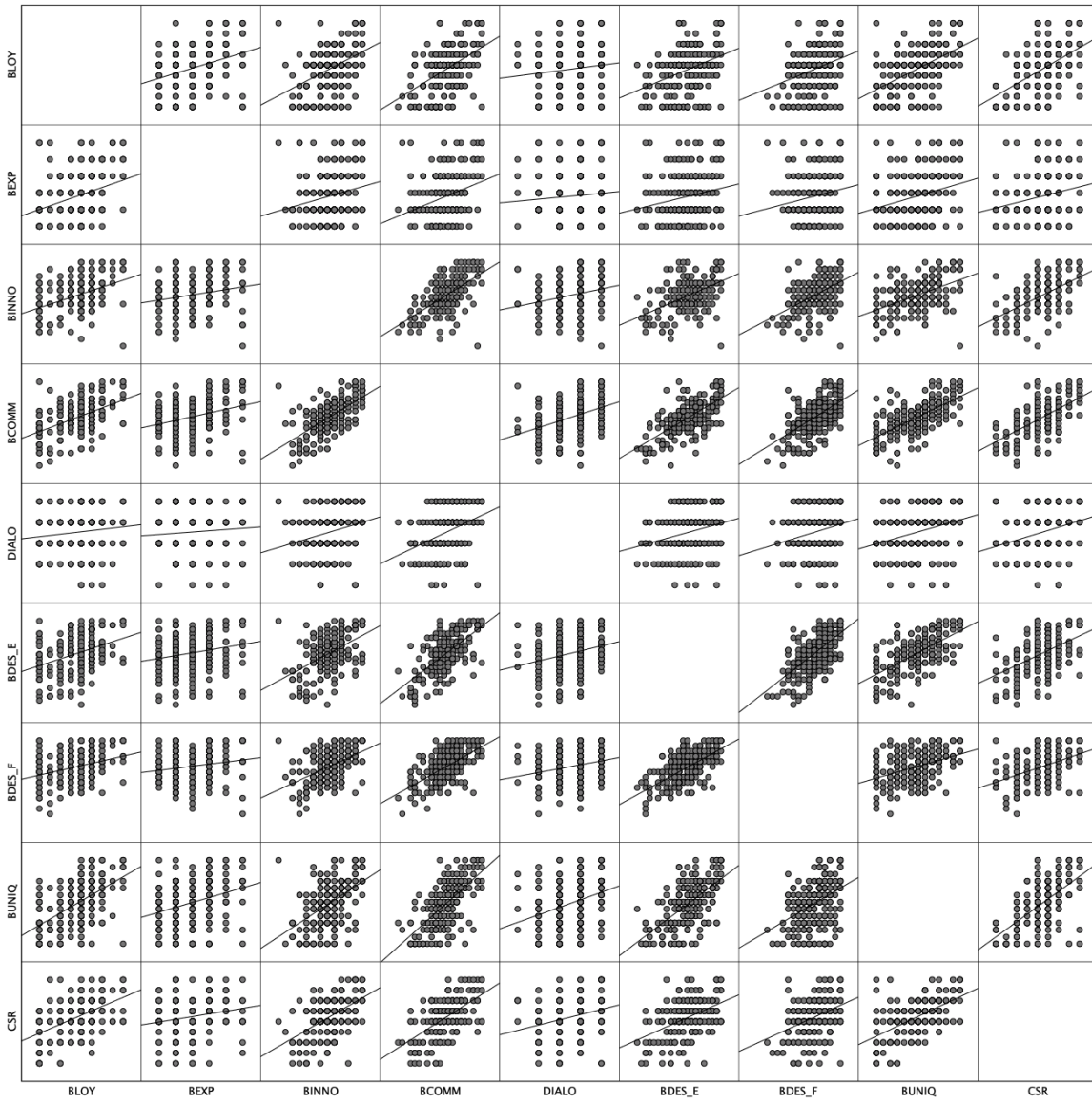


Figure 10: Linearity

Source: Own elaboration.

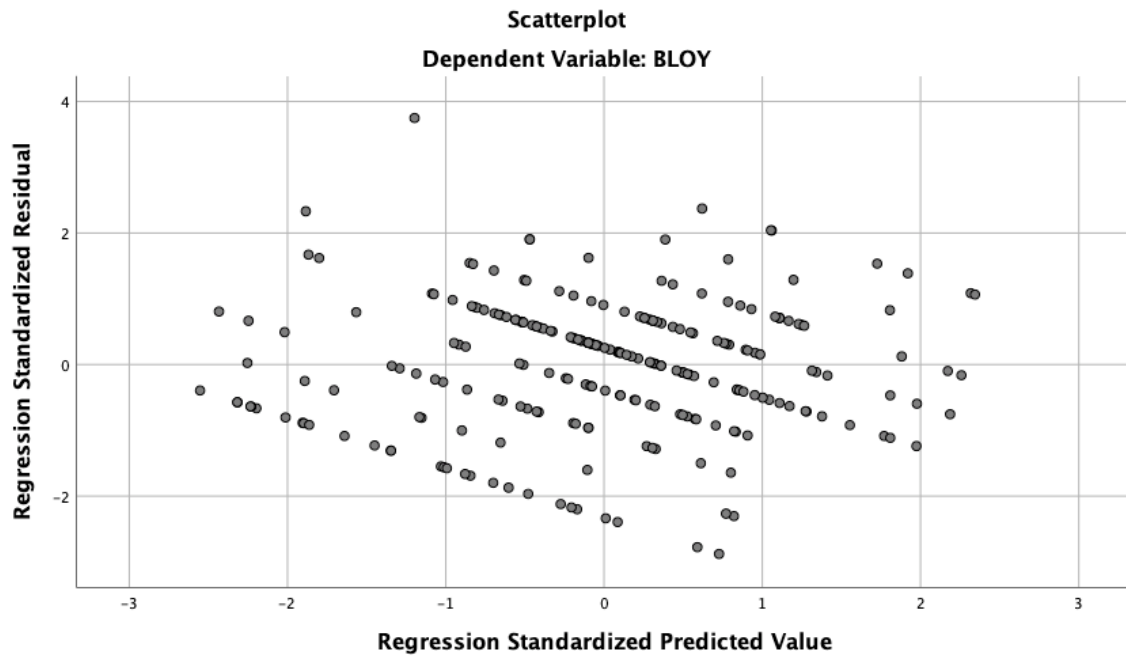


Figure 11: Homoscedasticity

Source: Own elaboration.

