

## CIVITAS VANGUARD TRAINING WORKSHOP: SESSION 1: INDIVIDUALISED SOCIAL MARKETING- WHAT'S IN A NAME

### Introduction

This first session begins by providing some definitions as to what social marketing is, and what distinguishes it from traditional marketing approaches. It then provides a brief historical account of social marketing, examples of the typical transport related campaigns that have been implemented, and some practical issues such as cost and skills required.

The second half of the session focuses on segmentation, what it is, the benefits of using a segmentation approach, the different types of segmentation, and when it can be done.

The following session will go over the practicalities of actually conducting a social marketing based intervention, in the form of a step-by-step guide.

### What is social marketing?: Definitions

Kotler & Zaltman (1971) are credited with first introducing the term social marketing, defining it as;

*“The design, implementation, and control of programs calculated to influence the acceptability of social ideas and involving considerations of product planning, pricing, communication, distributing, and market research” ..... (page 5)*

Since 1971, several alternative definitions of social marketing have been suggested, with one of the most useful and widely cited been provided by Andreasen (1995):

*“Social marketing is the application of commercial marketing techniques to the analysis, planning, execution and evaluation of programs designed to influence the voluntary behaviour of target audiences in order to improve their personal welfare and that of their society” .....(page 7).*

A key feature of social marketing campaigns is the focus on voluntary behavioural change: Social marketing is not about coercion or enforcement, but rather on persuasion- carrots vs. sticks. Changing behaviour is a key component of any social marketing campaign and is thus different from other campaigns where the focus is solely on raising awareness or increasing knowledge. However, in a transport context most awareness raising or educational campaigns do ultimately aim to change people's behaviour and this distinction is often blurred.

In a later paper Andreasen (2002) suggested 6 essential key characteristics of a 'true' social marketing campaign, namely;

**[1] Aims to improve individual welfare and society as a whole:** This distinguishes social marketing to other marketing techniques which primarily aims to benefit the organisation that is doing the marketing (i.e. typically making more money). In the context of transport related behavioural change programs the social

good is often focussed on helping to reduce climate change by reducing car use and/or the health benefits of using sustainable transport options;

**[2] Consumer focus:** The intervention is based on an understanding of consumer experiences, values and needs. All decisions made should be with the consumer's perspective in mind. This is one of the key features of social marketing and the intervention needs to be designed to fulfil the audience's needs and wants' in order to successfully change their behaviours;

**[3] The principle of exchange:** Social marketing aims to induce change by applying the principles of exchange. For (almost) every choice that people make there is a change that occurs. In terms of modal choices they need to give something up in return (e.g. their cars) for something else (another mode). Before making decisions as to whether to change to a new behaviour, people will compare the costs and benefits of performing the new behaviour before choosing to adopt it, or not. A key feature of social marketing campaigns is to identify both the costs and benefits for individuals involved in changing to the new behaviour and then present this choice option (whether to switch or not) in the most positive way, i.e. the recognition that there must be a clear benefit for the individuals been targeted for change to occur;

**[4] Utilises the marketing mix (4 P's):** The marketing mix, also known as the "4 P's", is made up of four parts that, together, create the 'exchange' offered to the target audience in a social marketing campaign.

At a simple level this relates to;

*"Getting the **product** right, at the right time, at the right **place**, with the right **price** and presented in the right way (**promotion**) that succeeds in satisfying buyer needs"*  
(Cannon, 1992)

In a transport related behavioural change context the 4 P's relate to;

#### **Product:**

- This is the travel behaviour you are **promoting** to your audience – for example, cycling to work or school (*what you want them to do*) – this is what you're *selling to them*;
- The products or services offered to support this behaviour change (i.e. the mobility management or infrastructural measures you will be implementing – *how you'll help them do it*;
- The benefits the audience will experience as a result – for example, time and cost savings, pleasure and fitness, a feeling of 'doing something good' (intrinsic satisfaction) – this is what they're *buying*.

**Price:** What the audience needs to give up to get the **product**, i.e. the costs or barriers to making the desired behavioural change. The price for social marketing products is not always monetary, but can include other tangible factors such as loss of time or comfort, or intangible factors such as changes in beliefs, attitudes and habits. The aim of the social marketing campaign is to minimize or reduce these costs to individuals.

For example, a lot of people will indicate they drive to work as it is the quickest and most comfortable way, and say they would not use public transport as it would take them longer and be less comfortable. For some people this may be true (i.e. they would need to take 2 or 3 buses for the same journey and the bus services they must use are may be old, uncomfortable or unreliable). However, for many people perceptions about public transport are in fact miss-perceptions and the social marketing campaign would aim to address these miss-perceptions by perhaps providing personalized route maps, service time and stop location information, and perhaps a free trial bus ticket to show people that the bus journey is not as bad as they thought. A good overview of how peoples misperceptions toward public transport can be addressed by information provision is provided by Beale and Bonsall (2006).

Alternatively, it may be better to increase the costs of their current behavior to make the alternative costs lower. For example, a work organization might introduce parking charges or remove parking spaces for employees, together with perhaps incentive measures such as discounted bus fares, improvements to walking/cycling conditions etc. to also lower the cost of the desired behavior.

**Place:** The locations and environments where you will engage with your audiences and/ where they will learn more about, try out and/or continue doing the travel behaviour you are aiming to promote. For example this could relate to the public transport vehicles/stations they will be using, or walking and cycling conditions. The aim of a social marketing intervention is to make these places as safe, convenient and pleasant to use to ensure as many people as possible will use these alternative transport options.

**Promotion:** How are you going to engage with your target audience whose behavior you are attempting to change? This relates to the messages, materials, media channels, incentives and activities that describe the behavioural change interventions benefits (i.e. the **product, price and place**).

**[5] Competition:** What are the competing behavior [s] that are competing with the behaviour you are trying to promote? In most cases this will be the private car and you need to establish why people are currently driving, or why they prefer to drive (than say use local buses) and then attempt to address these competing reasons in the intervention.

**[6] Uses segmentation approaches:** Social marketing uses techniques such as segmentation. Segmentation is discussed in greater depth in the second half of this training session;

## **Brief history of social marketing**

Evolving from a range of separate disciplines (e.g. sociology, psychology, marketing, communications theory), from the early 1970's 'social marketing' has grown and matured into a separate and widely used discipline. In its formative years social marketing was primarily applied to health problems (e.g. smoking cessation) and

whilst most of the focus of most social marketing campaigns still lie within the health discipline, for example improved nutrition, contraceptive use, anti-skin cancer campaigns, AIDS awareness and organ donation, it is now been applied to other societal problem areas.

More recently social marketing principles have been applied to transport related problems including drink driving, speeding and use of seat belts (Kotler, Roberto & Lee, 2002), and also to modal choice decisions, or as part of wider campaigns, such as 'sustainable lifestyles' which include transport use with other lifestyle choices including energy and water use and recycling (e.g. Barr, Gilg & Shaw, 2011).

Some typical examples of social marketing based interventions are outlined below. However, it should be noted that, although, quite often, although, the implementers or organisers of these campaigns claim that they are based on social marketing principles, they might not include all of Andreasen (2002) key 6 required components (see earlier), and in the strictest of definitions are not 'true' social marketing campaigns.

### **Individualised travel planning**

One of the most common applications of social marketing principles is known as individualised (or personal) travel planning. Whilst the actual content and delivery methods vary across campaigns (e.g. Steer Davies Gleave- Travel Blending, now Living Change or Socialdata- 'IndiMark'), they typically share the following characteristics;

[1] Contact (cold calling/telephone/mail) is made with individuals or households;

[2] Current travel behaviour is established- do they drive cars or not (using segmentation principles);

[3] Their willingness or motivation to change to sustainable transport modes (or specific mode) is established (using segmentation principles);

[4] Barriers to mode shift are identified explored (via interviews/questionnaires/feedback to travel diaries);

[5] Tailored information is provided to people in an attempt to overcome these barriers and get them to try or switch to the desired new mode[s]. For example 'tips' and 'suggestions' on how to reduce travel or make it easier and less stressful, personalised journey plans, local public transport maps, walking and cycling route maps information packs, and often the offer of 'gifts or incentives (e.g. pedometers, water bottles, free bus tickets);

A key difference in the approaches concerns the overall aim of the projects, with some attempting to reduce the amount of travel people do, and others focussing on changing the way people travel. For a good overview of personal travel planning and its effectiveness, see Cairns *et al.* (2004); Parker *et al.*, (2007a), and also the presentation tomorrow documenting the experiences of implementing a campaign in Brighton, UK.

Whereas individualised travel plan approaches generally do not include infrastructural improvements in their programs, in some 'community based' social marketing campaigns (in US/Canada) a similar individualised marketing approach is used as above, although, is often accompanied by the introduction of new cycle lanes, or walking routes. Examples of such campaigns can be seen at the Tools of Change and UK National Social Marketing Centre websites.

Another typical type social marketing based intervention is known as targeted marketing whereby targeted information is provided to individuals, or predefined target groups (identified via segmentation) via different media (e.g. information packs, TV adverts, posters) in order them to change to a specific behaviour. This is a typical strategy used by public transport operators in order to entice new users, who will do some form of preliminary research amongst non-user groups and based on the barriers to modal switch identified, design appropriate marketing materials to attempt to address this segment groups concerns (see Beale and Bonsall, 2006).

An example of an individualised targeted marketing campaign conducted in Hammersmith, UK is presented tomorrow.

It is also 'claimed' by many event organisers that local or national events can be designed according to social marketing principles. For example, the event would focus on identifying particular issues or barriers identified at a community or organisational level or perhaps focus on a particular aspect (or multiple aspects) that has been identified as a main barrier to change amongst the target audience of the event (e.g. perceptions of safety, normative beliefs, lack of confidence etc.)- Examples of such events are available on the Tools of Change and UK National Social Marketing Centre websites.

In relation to influencing individuals modal choice decisions Thøgersen (2007) concluded that the key factor that would classify any intervention as 'social marketing' is that it fulfils the target customers needs and wants- a prerequisite for voluntary behavioural change, specifically;

*“Successful social marketing is based on a thorough understanding of ‘customers’ needs, wants and perceived barriers, it uses a combination of means to create a attractive offering tailored to the needs, wants and perceived barriers of individual segments of consumers, and it applies proven techniques for catching attention to the offerings” (page 17).*

## **Does social marketing work?**

Several researchers have examined the effectiveness of social marketing campaigns in non-transport related disciplines (e.g. health, road safety) and a general consensus is that social marketing based campaigns (if applied correctly) are considerably more effective than traditional mass (one size fits all) based campaigns (e.g. Gordon *et al.* (2004); Smith (2006).

In relation to transport related applications Kassirer & Lagarde (2010) reviewed available evidence on community based social marketing campaigns and concluded that

*“Social marketing has developed a strong track record worldwide for its effectiveness at influencing a wide range of behaviours for both personal and public good. In Canada, the USA, Europe and Australia, for example, dozens of communities have decreased the modal share of participants car trips by 8% to 15% and overall vehicle kilometres travelled (VKT) by up to 5%, and have significantly increased walking, cycling and transit use, by following most or all of the social marketing planning steps and principles”*

## How much does it cost?

A lot of people are put off from using social marketing techniques as they think it is a resource intensive process and requires a large budget and staff resources. This can be true, especially for large scale project, but it is also possible to use social marketing with a limited budget and resources. For example, if you are working with just a small group of people, you can still use elements of social marketing- i.e. think about the problems and issues for the standpoint of this small group of people, and then base your intervention around this.

The costs involved, will like any other projects depend on the scale of the project been implemented, although, any additional costs incurred must be offset by the additional benefits that a social marketing approach can bring- **greater returns for your investment.**

For example, in relation to personal travel planning programmes it is estimated that it typically costs between £20-38 (22.5- 43 Euro) per targeted household, although it is also estimated that over a 10 year period for every £1 (1.13 Euro) spent the return would be £30 (34 Euro) for this investment (see Parker *et al.*, 2007b for an international cost benefit analysis of personalised travel planning).

## Segmentation

As mentioned earlier segmentation is one of the key components of social marketing and the remainder of this session will focus on the different types of segmentation techniques available, justifications for using segmentation, and when and when it can be used.

### What is it?

Sullivan & O’Fallon (2008) define segmentation as:

*“The process of dividing a market into different groups of customers with the purpose of creating different products, services, and/or communications to meet their specific needs” (page 1)*

The aim is to divide a broad target group (e.g. general population) into more homogenous subgroups (or segments), who share the same characteristics (e.g.

beliefs, values, attitudes, perceived barriers and willingness to change behaviour etc.) which will allow a more focussed and targeted intervention to be designed.

### **Why use segmentation?**

There is a general consensus that when attempting to change the travel choices of individuals there is little point in targeting the *average* motorist/ traveller as modal choice decisions are known to be dependant according to different individuals motivation, attitudes, perceptions, as well as more objective factors such as the practicality of been able to use alternative transport modes. In short there are numerous subjective and objective barriers to behavioural change and different barriers will be experienced by different people. Accordingly, campaigns such as mass-targeted awareness campaigns, whilst might 'reach' some people that could/or would like to change their behaviour, would also reach a lot of people that could not/or are not interested in changing their behaviour, i.e.

### ***There is no such thing as a one-size-fits-all solution***

In relation to transport problems there is a general consensus that the use of social marketing techniques, specifically the segmentation component can significantly enhance behavioral change type interventions. For example, in a recent review of peoples' attitudes towards transport and climate change (Anable, Lane & Kelay, 2005) concluded;

*"There is a general consensus in the literature that a staged and targeted strategy of travel behaviour change is likely to be more effective than a 'one size fits all' approach (page 12)*

Evidence of how widespread the use of segmentation within the transport domain is revealed by Croin & Hightower (2004) who noted;

*"In terms of specific marketing techniques, most of the respondents (186 members of the American Public Transit Association and the Association for Commuter Transportation) report using segmentation strategies (89%)" (page 33)*

Providing individualized and targeted information is a key component of individualized travel planning interventions, and Brog, Erl & Mense (2002) referring specifically to personalized travel planning campaigns note that in terms of providing information

*"This personalized approach means that the information needs of people can be identified and provided in a very specific way. They receive only that information which they really need instead of a low level flood of material. Providing information tailored to individual situations is far more convenient and motivating than having to filter through and select from multiple possibilities (page 18)*

Many (most) behavioural change projects can be expensive, and like any other 'investment' the primary aim should be to obtain the greatest value for this investment. In most cases this equates to changing the behaviours (to the projects desired aims) of as many people as possible- or it should be !. The main argument is

that it is better just to focus your resources on those that could change, or have the greater potential for change, and segmentation (if done correctly) is a tried and tested method will allow you to do that.

## Different types of segmentation

Having established the potential benefits of segmentation, the following section provides examples of different segmentation that can be used

There are many types of segmentation approaches (see Wedel & Kamakura, 1998; Darnton & Sharp, 2006) that can be used, although there is no single one method that is most suitable, as the choice of segmentation approach will be dependent on each individual project, the resources and skills available to those conducting the campaign. For example, see Elmore, 1998 and Guiliano & Hayden, 2005 for reviews of different segmentation approaches that have been used to increase public transport use, and their relative strengths and weaknesses.

Segmentation types can be viewed as lying along a continuum varying in complexity, theoretical basis and variables (attitudes, socio-demographic, use of modes etc., or combinations) used.

A key distinction with segmentation approaches relates to how segments are derived, which can be either;

**[1] A Priori:** Groups are selected from a population in advance based on known characteristics and declared as segments, e.g. based on various socio-demographic factors or frequency of car use, or;

**[2] Post hoc (or market-defined):** Where empirical investigation typically using some form of multivariate statistical analysis is used to identify segments. This approach may include a variety of attitudinal, behavioural or personality characteristics (often in a combination).

The key difference is that in the later approach segments are determined by the data collected, not the researcher, and the number of segments and their relative size is not known until the process has been completed (Anable, 2005).

Rather than attempt to document all segmentation variants a selection of the main types are illustrated below, which can be broadly divided into socio-demographic, situational, behavioural, attitudinal, theoretical, although quite often a combination of approaches are used.

### Socio-demographic

At a very basic level it is possible to divide a larger target population into different segments according to socio-demographic factors. For example, the campaign might be focussed on a specific age group, perhaps pensioners or teenagers, or gender (males or females), or perhaps on two (or more) socio-demographic factors, such as older females, young males.

This is a typical approach used in more traditional marketing approaches. For example, a high-end sports car manufacturer might focus its marketing efforts on



'affluent males', as this is the group (segment) who are more likely to be able to afford, and want one.

### **Situational**

Another relatively simple segmentation technique is to segment people according to where they live (or work) according to transport services. For example, if you were aiming to get people to walk, rather than drive to a particular destination (local school/workplace) it would be more useful to focus your resources on people for whom this was potentially practical, e.g. those who lived within say 1-2km of the destination.

### **Behavioural (e.g. use of transport modes)**

Again a relatively simple method, but widely used, is to target specific groups based on their current transport use. In many projects the aim is to encourage people to use specific transport modes (cycling, buses etc.) and for perhaps obvious reasons it is more useful and more cost effective to target non users, or infrequent users of these modes (i.e. frequent current users have no behaviour to change). Similarly, if you were looking to change the behaviour of people who drove to work/their children to school, you would target these groups- again those that use buses or walk already- have no behaviour to change.

### **Attitudinal**

Attitudinal based segmentation approaches go beyond the traditional targeting approaches that may focus purely on socio-economic, situational or behavioural characteristics by looking at alternative ways that people can be 'profiled' by considering individuals' motivations, readiness to change, and underlying perceptions, beliefs and attitudes towards alternative transport modes.

For anyone who is attempting to change behaviour it is very useful to understand the behavioural change process, and these underlying beliefs, attitudes and perceptions, and how the use of segmentation (according to these factors) can enhance the behavioural change process.

Most relevant to this workshop is a widely accepted fact that in any given population some people are more susceptible, or ready to change their travel behaviour than others (e.g. Curtis & Headicar, 1997; Anable, 2005).

This partly relates to more subjective factors such as peoples' attitudes, perceptions and level of confidence towards their current travel mode choices, and towards alternative travel choices, as well as their wish to actually change their travel mode behavior, and underlying personal and social normative beliefs.

In this context, if people currently have negative perceptions and attitudes towards alternative modes, little or no confidence in using other modes, see no reason to change modes, or are influenced by social or personal norms not to change, they will be unlikely to do so. The role of social marketing campaigns should be to attempt to change these attitudes, beliefs and perceptions, and instill confidence in a positive

way in order to motivate people to try out, and ultimately adopt new travel mode behaviours.

For other people the barriers to modal shift are more objective: for example, if there is no bus service operating on the route for their journey they could not switch to local buses for that journey, or if they have a mobility-impairment that prevents them from switching car trips to traditional bus services, cycling or walking. In this instance social marketing interventions alone would be unlikely to change people's travel behaviour, and 'harder' more infrastructural measures would have to be implemented first or simultaneously, e.g. such as the addition of new bus services, or Demand Responsive Services for mobility-impaired people. The role of the social marketing intervention would be more supplementary in ways such as increasing awareness of these new services e.g. via travel awareness campaigns, or provision of free tickets to entice people to try new services.

There are various types and variants of attitudinal segmentation approaches that have been suggested and applied to transport related problems. Some of these are briefly described below.

### **Ability and willingness**

Perhaps one of the simplest types of attitudinal segmentation that can be used is to segment a target population based on their 'ability' and 'willingness' (either together or alone), to switch to an alternative mode. Based on two simple questions (see following session notes) this allow 4 segment groups to be obtained, those that are;

- Able and willing
- Able but unwilling
- Unable but willing
- Unable and unwilling

The 4 segments can be viewed as lying along a continuum according to peoples likelihood of changing behaviour (i.e. able and willing most likely, unable and unwilling the least likely), which can help inform which segments to focus on and also the types of interventions that would be required to change their behaviours.

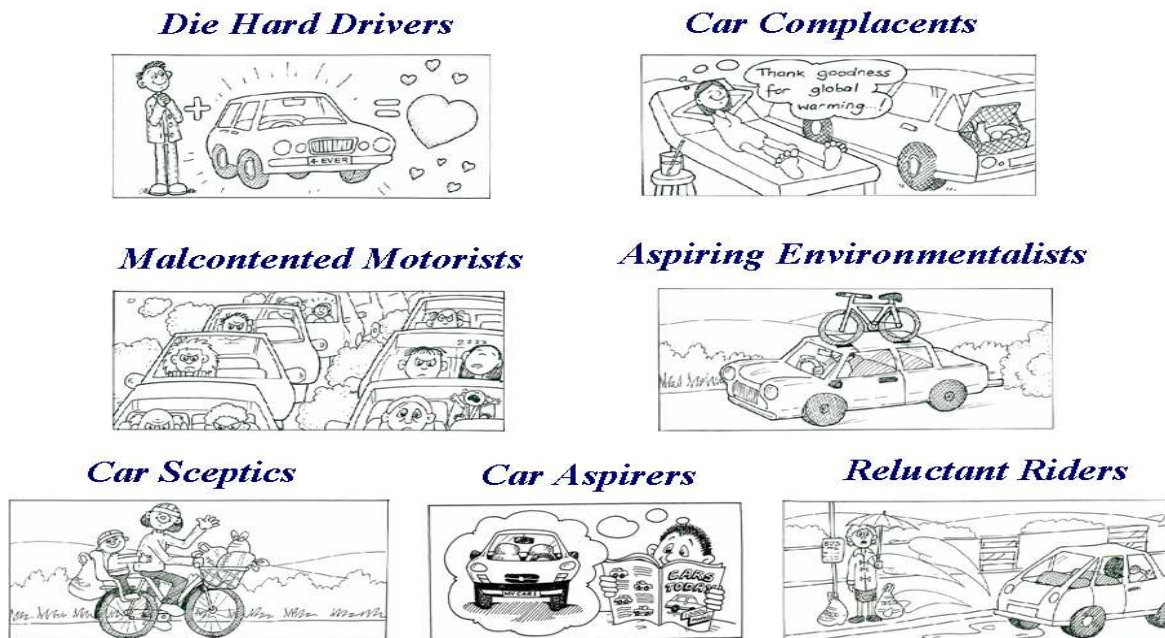
For example, for those people in segments who are 'unable' you would need to identify the reasons why they so, and in some cases this may requires infrastructural changes such as new public transport services, cycle lanes, changes in work hours etc., although, or could be for some people that they are actually able (but just don't know it) and may need help or convincing that it would be possible to change (e.g. providing personal journey plans and information.

For those who express 'unwillingness', again you would need to first establish why they were unwilling, and the focus of the intervention should be to change these underlying attitudes towards changing. This may entail for example, changing mis-perceptions about alternative modes that people hold, or instilling sufficient confidence so they feel able to try out/switch to alternative modes.

## **'Die Hard Drivers' and 'Aspiring Environmentalists'**

At a more complex level, several researchers have developed different attitudinal segmentation approaches based on a range of attitudes and beliefs on using different transport modes and wider attitudes to environmental issues.

One of the first applications of this type of attitudinal segmentation was developed by Jillian Anable's which looked at the travel behaviours and choices of people visiting National Trust properties in the UK (Anable, 2005). Based on statistical analysis of peoples responses to about 100 different attitudinal statements (e.g. Factor Analysis followed by Cluster Analysis) which revealed 4 car driver and 3 public transport user segments- see Figure 1 below.



**Figure 1: Segmentation profiles (Anable, 2005)**

For illustration purposes, two of the segment profiles are provided below.

### **Die Hard Drivers**

- Have the lowest desire to reduce car use
- Have the highest psychological car dependency
- Care a lot about what their car says about them
- Perceive many problems with most other (non-car) modes
- Unwilling to sacrifice car use for the sake of the environment

## **Aspiring Environmentalists**

- Have a 'practical' approach to car use (use when needed)
- Have already reduced their car use and will reduce it further if given the chance
- Don't particularly like car travel, enjoy cycling and train travel
- Feel responsible about environmental problems

Using these two example segments Aspiring Environmentalists are more likely to be susceptible to social marketing type interventions, and arguably you would target this group and not the Die Hard Drivers.

The use of these segments, or variants of these segments have been widely used (in the UK) and more recently across Europe. For example, a similar approach was adopted by Beirão & Cabral (2008) for Portuguese commuters, which identified six distinct groups 'Transit Enthusiasts', 'Anxious Status Seekers', 'Carless Riders', 'Green Cruisers', 'Frugal Travellers', and 'Obstinate Drivers'.

An overview of the ongoing SEGMENT Project, which uses similar attitudinal segmentation techniques, which will be presented tomorrow.

## **Theoretical based segmentation**

It is increasingly acknowledged that in many instances behavioural change does not occur as a one-step process and can instead be viewed as a series of transitional stages (or steps) which individuals progress through in order to reach the final stage of behavioural change (e.g. Bamberg *et al.*, 2010).

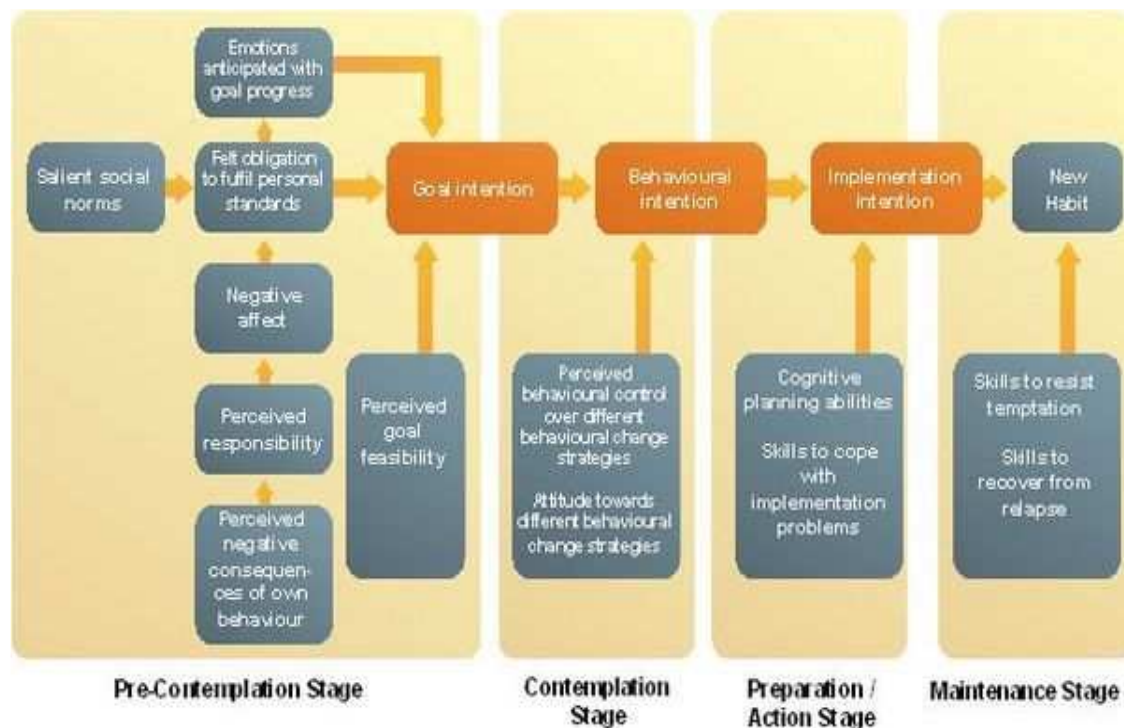
Accordingly, the implications are that any social marketing intervention is likely to affect people in different ways based on their susceptibility to change behaviour and stage position within the behavioural change process (Carreno & Welsch, 2009), and thus social marketing interventions should be tailored to where people are within the behavioural change process, as well as their susceptibility to switch modes.

Whilst there are several competing behavioural change models, current understanding of individuals' modal choice decisions is provided by MaxSEM. This new theoretical model evolved from the recently completed MAX-SUCCESS FP6 project.

In simple terms the model consists of 4 stages that people must progress through in order for behavioural change to occur and a new behaviour to be formed- Pre-Contemplative (not interested/not thinking about change), Contemplative (thinking about change), Preparation/Action (preparing to change) and Maintenance (have changed)- see Figure 2 below. These stages can be viewed as a series of steps, leading up to the final step of actual behavioural change. Although the steps are fundamentally different from each other and follow on from each other in a logical

way, it is possible for some stages to be missed (e.g. pre-contemplators could move directly to preparations/action or maintenance stages) or backward movement (stage regression) could occur.

In order for people to progress from earlier to later stages, key **threshold** points (shaded in Fig. 2) have to be 'satisfied'. So for pre-contemplators to become contemplators the key is the formation of a '**Goal Intention**' (i.e. they have to recognise their current level of car use is 'problematic' and want to reduce it). For people to form a goal intention, several factors (constructs) are known to be important, although the importance of each construct will differ on an individual basis. For example, for some people the key factor may be for them to 'feel bad' about their current level of car use (Negative affect) and for others they may feel that to reduce their car use at the current time is not a realistic option (goal feasibility) etc. Once in the contemplative stage, they then have to identify which would be the most suitable option (mode) for them to reduce their car use, and feel sufficiently positive towards (Attitudes towards different behavioural change strategies) and/or confident (Perceived behavioural control) to use this alternative non-car mode and a '**Behavioural Intention**' is formed. The transition into the final Maintenance Stage involves individuals making definite plans and/or possibly trying out the new mode choice, which is conceptualised by an '**Implementation intention**', and ultimately this new behaviour becomes their new normal dominant mode behavior (see Bamberg *et al.*, 2010 for more details on MaxSEM).



In order to measure individuals current stage position (use of cars, and also willingness to change) a set of simple stage diagnostic questions have been developed (see next presentation) which then allow interventions to be designed accordingly (see Carreno & Welsch, 2009).

The MaxSEM segmentation is thus a hybrid approach as it combines both peoples current transport behaviour (in terms of car use) with their willingness to change to alternative modes.

More details about the MaxSEM segmentation approach will be presented in one of tomorrow talks.

### **Combined approach**

As with the MaxSEM approach, it is typical for more than one segmentation approach to be used together.

As a simple example a hybrid technique can use a combination of behavioural data with attitudinal data on people's willness to change to obtain the following four segments

- Non (sustainable transport) users with negative attitudes to switching
- Non (sustainable transport) users with positive attitudes towards switching
- (Sustainable transport) Users with negative attitudes to continuing
- (Sustainable transport) Users with positive attitudes towards continuing

Accordingly, this segmentation approach can be used to decide on which groups to focus on. For example non users with positive attitudes and more likely to become users, than non-users with negative attitudes towards changing, and users with positive attitudes towards continuing are more likely to continue using sustainable transport modes compared to those with negative attitudes- and based on this information appropriate intervention strategies can be designed accordingly.

As another example, you may be interested in promoting cycling to a specific destination and as a starting point it may be useful to identify those that have the greatest potential to walk based on the distance from their home to that location.

So for example, you would identify and focus the social marketing campaign on people living within a kilometre of the destination, but in addition you might then further segment these people by those who are interested in, or able and willing to walk, rather than including people who were not interested in, or able, or willing.

Similar to the 'willingness to change' component (able and willing earlier), most individualised travel planning campaigns use simple segmentation techniques to identify specific individuals who are more likely to switch modes or (at least) indicate they are willing to participate in the campaign taking into account their current travel behaviour.

In the tried and tested methodology Socialdata for example, initially identify those people who are currently using sustainable transport modes and also ask them if they would be interested in receiving information about alternative transport modes (motivated to change). This allows three main segment groups to evolve;

- **Interested:** Were not currently using sustainable transport modes on a regular basis (or at all) but expressed an interest in receiving information about them
- **Regular:** Were already regular users of sustainable transport modes, although some of this segment may still want further information.
- **Not interested:** Did not want or require any information about sustainable transport modes

Based on this simple segmentation method it allow project resources to more efficiently targeted to those individuals that express motivation to change their current behaviours, and conversely not 'waste' resources on those that express no motivation, and thus would be unlikely to change. Those that do request further information, a more detailed discussion occurs that allows the project administrators to determine the specific needs of each individual and provide the most appropriate and useful information.

### **Do you need to do segmentation?**

A key question often asked relates to whether segmentation should be used in every project- the answer is;

- **Yes:** Given the undisputed benefits of using segmentation, any form of segmentation is likely to increase the effectiveness of any intervention. However, depending on the type of segmentation used, it may be that more specialised skills are required for say data analysis (to identify segments) and depending on the scope and resources available to the project, it may be that some aspects of the project need to be out-sourced and this may be a factor when making decisions to use segmentation, or not;
- **No:** In some cases such as personal travelling planning, segmentation is already embedded within the process (see earlier) and in this case no additional segmentation is required.

### **Which type of segmentation to use?**

Related to the question above, having decided to use segmentation, you need to decide on which type to use. The type to use, depends on many factors, including the type and aims of the project, skills of people conducting the intervention, budget available- it can cost a bit more to include segmentation as part of the project planning stage- but remember the benefits that will occur.





## References

### Key resources

Kassirer, J. & Lagarde, F. (2010). *Changing transportation behaviours - A social marketing planning guide*. Ottawa (Canada): Transport Canada-  
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The UK National Social Marketing Centre (The NSMC- <http://thensmc.com/>) provides a selection of case studies where social marketing has been applied in many areas including transport (<http://thensmc.com/resources/showcase/subjects/Sustainability>)

The 'Tools of change' website (<http://www.toolsofchange.com/en/programs/social-marketers/#5>) provides a good resource content including a practical guide for implementing social marketing campaigns, 'tools' to do so, and case studies documenting successful campaigns including transport based interventions (<http://www.toolsofchange.com/en/programs/social-marketers/#5>)

### Additional reading (cited in this session)

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