SOCIAL MARKETING: STEP-BY-STEP GUIDE

CiVITAS
Cleaner and better transport in cities

VANGUARD

Event: *Social Marketing Training Workshop*

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Location: *Toulouse (France)*

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OVERVIEW

- **Introduction**
- **5 steps for a successful SM campaign**
  - **Planning**
  - **Getting to know your audience**
  - **Campaign design**
  - **Implementation**
  - **Evaluation**
- **Resource and cost issues**

INTRODUCTION

- **Not attempt to cover all aspects in depth**
  - **In 45 minutes !**
- **Overview of 5 steps**
- **Focus on segmentation**
  - **How you can do it**
- **Resource and cost issues**
  - **Where relevant**
- **More detail in handout**

STEP 1: PLANNING

- As with any project, **planning** (your campaign) is the first and arguably the most important step
- But often missed, or not done properly !
- Key aspects
  - Quantify the problem
  - What is the desired behaviour?
  - Whose behaviour are you trying to change?
  - Set targets

QUANTIFY THE PROBLEM

- What behaviour are you trying to change?
  - Depends on project and project aims
- In this context
- Reducing solo-car use
  - Generally
  - Specific destinations
  - Parts of city/town (city centre)
- In most cases this is already known- and hence the project

WHAT IS THE DESIRED BEHAVIOUR?

What are you trying to get people to do?

- Again, depends on actual project
- Switching people (car drivers) to more sustainable modes)
  - Any alternative mode?
  - One or more modes [s]?
  - All trips?
  - Specific trips? (commuting/school runs/shopping)
  - Specific locations? (city centre)

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WHY (these questions)?

- May seem obvious
- Important to quantify at beginning
- As in subsequent steps will refer back to these answers
- Answers allow you to
  - Set targets
  - Decide on segmentation strategy
  - Inform design of intervention

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WHOSE BEHAVIOUR ARE YOU TRYING TO CHANGE?

At a more general level the key questions are;

- Is intervention targeted to
  - General population?
  - Specific parts of population?
  - Specific locations?
  - Specific trip purposes?
- The answers will determine your segmentation strategy and actual intervention

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WHOSE BEHAVIOUR ARE YOU TRYING TO CHANGE?

- Once these questions are answered you
- Have identified your **broad target group**, e.g.
  - Car drivers in general
  - Commuters driving to city centre
  - Parent driving kids to school
- You now need to
- Recruit these people
  - Sometimes straightforward (company employees)
  - Often not (see handout notes for examples)

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SEGMENTATION

Having identified your broad target sample

- Need to be more specific, and identify sub-groups
- Your **segments**
- No right or wrong method
- Method chosen, will depend on
  - Wider project aims
  - Resources available
  - Skills of those identifying segments

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SOCIO-DEMOGRAPHIC

- Can be useful for some projects
  - Maybe looking at gender issues
  - Focus on safety (Females)
  - Young males/older females
  - Pensioners
  - Unemployed teenagers
- Sometimes this data is already available, or
- Need to be collected via some form of baseline survey
  - See evaluation notes

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SITUATIONAL

- Segment people according to where they live or work, i.e.
  - 1km from home- destination greater potential for walking
  - 5 -7.5km from home-destination = greater potential for cycling
- Can be crudely done by drawing distance contours on maps
- More sophisticated mapping software

BEHAVIOURAL SEGMENTATION

On average how often do you use the following ways of travelling to/from work? ***Please tick only ONE box for each way of travelling.***

MODE	Every day	5+ per week	3-4 week	1-2 week	Less once per week	At least 2-3 times per month	Less than once per month	Never
	Frequent users			Infrequent users				Non-users
Car (as driver)								
Car (as passenger)								
Bus								
Walk								
All other relevant modes								

ATTITUDINAL SEGMENTATION

- Various attitudinal approaches
- Depends on
- Skill
  - Simpler attitudinal segmentation = relatively easy
  - More complex = sophisticated statistical analysis (Factor Analysis, Latent Class Analysis, K-Cluster Means Analysis)
- Resources
  - If you don't have the skills may need to subcontract this part of campaign, or
  - Use a simpler approach

ABILITY & WILLINGNESS

- 2 simple questions
- **Ability**
  - *'Would it be possible for you to use any alternative transport modes for your journey to from work?'* (Yes/No or Likert scale response)
  - Yes = Able
- **Willingness**
  - *'Would you be interested in using any alternative transport modes for your journey to/from work?'* (Yes/No or Likert scale response)
  - No = Unwilling
- Cross-tabulation
  - 4 groups
  - Able & willing, unable & unwilling etc.

COMPLEX ATTITUDINAL SEGMENTATION

- 12 – 14 attitudinal questions
  - Earlier presentation
  - Based on theoretical assumptions
  - But not one specific theory (like MaxSEM)
- Statistical analysis required
- Cost and skill issues

MaxSEM THEORETICAL SEGMENTATION

Which of the following statements best describes how you feel about your current level of car use for daily trips (in city X/ to your workplace) and whether you have any plans to try to reduce some or all of these car trips? *Please choose which statement fits best to your current situation and tick only one box* The exact wording of this question will depend on the type of trips the mobility project is attempting to change (e.g. general every day trips, or more specific trips such as journeys to/from workplaces, schools etc.).		STAGE
As I do not own / have access to a car, reducing my level of car use is not currently an issue for me	❑	M
As I am aware of the many problems associated with car use, I already try to use non-car modes as much as possible. I will maintain or even reduce my already low level of car use in the next months.	❑	M
At the moment I use the car for most of my trips, but it is my aim to reduce my current level of car use. I already know which trips I will replace and which alternative transport mode I will use, but as yet have not actually put this into regular practice.	❑	PA
At the moment I do use the car for most of my trips. I am currently thinking about changing some or all of these trips to non-car modes, but at the moment I am unsure how I can replace these car trips, or when I should do so	❑	C
At the moment I do use the car for most of my trips. I would like to reduce my current level of car use, but feel at the moment it would be impossible for me to do so.	❑	PC
At the moment I use the car for most of my trips. I am happy with my current level of car use and see no reason why I should reduce it	❑	PC

TARGET STAGES

Once stage position identified, you can decide on

- Focus on 1 or 2 stages?
  - Contemplative and preparation/action
  - Higher stage of readiness to change
- Use only stages to fit with planned intervention
- Cycle training more suited for Contemplators
  - Low confidence (PBC)
- Travel awareness for Pre-contemplators
  - Make them think about change (GI)

BARRIERS TO CHANGE SEGMENTATION

- Segment according to the specific barriers that are preventing your target sample from changing
  - Discussed more in Step 2: Getting to know your audience
- Match your intervention to these barriers (Step 3: Campaign design)
- Maybe ask contemplators
- *"What are the main barriers that are preventing you from actually starting to cycle/walk/use PT?"*
  - *If people say no Safe walking route*
  - *Unless you have resources to introduce safe routes*
  - *Miss this segment*

MEASURES REQUIRED FOR CHANGE SEGMENTATION

Q7: Cycling: In order for you to consider changing from car to bike for some or all of your journeys to/from work which, if any, of the following measures would have to be in place for you to do so? **In Answer Column 1, please tick all that apply. In Answer Column 2, tick the 3 changes/improvements most important to you.**	ALL CHANGES IMPORTANT TO YOU	3 MOST IMPORTANT CHANGES
Safer cycle routes?	❑	❑
Showers and changing facilities at my workplace?	❑	❑
A financial incentive for me to cycle rather than drive (e.g. daily or weekly payment)?	❑	❑
A free bike I could borrow?	❑	❑
Cycle training/lessons?	❑	❑
Etc., etc.	❑	❑

WHICH TYPE TO USE?

- Depends !
  - Nature of intervention, resources available, skills of project team (data collection/ analysis required)
- Socio-demographic and behavioural
  - Probably too simplistic on their own
  - As likely to be many differences between these broad groups- attitudes/perceptions, willingness/ability to change etc.
- MaxSEM includes behavioural and attitudinal
- BUT, always useful to include barriers to change and measures needed to change as final step

SET TARGETS

- Set your targets at beginning of the project
  - Reduced CO2
  - Reduce energy consumption
  - % reducing car use/switching to alternative mode [s]
  - Improve air quality
  - Reduce road accidents
- Use SMART model
  - See handout notes
- Needs targets to successfully monitor and evaluate
  - Step 5

STEP 2: GETTING TO KNOW YOUR AUDIENCE

Once your segments are identified and recruited, the next and most critical step for a successful social marketing campaign is to

GET TO KNOW THEM

- Getting to know them relates to
  - Identifying barriers to change
  - Identifying the benefits to change
  - Compete with the competition
  - And a few other things

BARRIERS TO CHANGE

- Need to identify the specific barriers (exchange costs) that are preventing target sample from changing
  - ***Exchange costs***
- If not it is very hard (impossible) to decide on the specific measures that could be introduced that would help them change to the new behaviour.
- Could include
  - Psychological (negative attitudes/perceptions
  - Personal (accessing services/walking/cycling)
  - Provision (lack of/no services)
  - Informational (Lack of)

BARRIERS TO CHANGE

Most important points are to

- Establish the specific barriers that relate to your target group, and then to;
- Identify which are the most important barriers (to the majority of people in your target group), and;
- Identify only those barriers that you will have the potential to address in your intervention, e.g.
  - If infrastructural changes would be required for some people and you don't have the resources to make these changes
  - Exclude these people from intervention

BENEFITS TO CHANGE

- Similar to barriers to change, it is important to identify the benefits that people would gain from switching to the behaviour you are promoting
- These often mirror barriers, e.g.
  - Health/exercise benefits, Time savings, Cost savings
- As with barriers the aim is to identify all potential benefits that are relevant to your target group;
- Then identify which are the most important benefits, and use this information when designing your intervention.
- e.g. Financial savings
  - Take the bus it's cheaper
  - Walk it's free

KNOW YOUR COMPETITION

- Also important to know why people are currently using the mode (car) they do, i.e.
- **What the competition is offering**
- So you can counteract this by
- Asking questions such as
  - What do people like/dislike about the competing behaviour?
  - What makes it easy/difficult for them to do the competing behaviour?
- Then focus on their dislikes (traffic jams) and difficult aspects (parking) in the intervention

ADDITIONAL FACTORS

- **Role models**
  - Who people look up to?/whose opinion they value?
- **Social norms**
  - Who are, and what other important people (to your group) are doing- is it 'cool' to cycle?
- **Media habits**
  - What type of media you target group use (TV, newspapers, Facebook)
- **Learn from others**
  - Past studies, ELTIS website (www.eltis.org/)
- **Key life moments**
  - Moving house, marriage, retirement
  - See SEGMENT project overview tomorrow

DATA COLLECTION

- Various methods
- Qualitative
  - Focus groups/interviews
- Quantitative
  - Questionnaires
- Triangulation (both)

PRACTICAL CONSIDERATIONS

Data collection

- **Cost**, depends on
- Extent of data collection- should aim to
- **Do as much as you can**, and
- **Do it properly**
- Focus on research that is directly relevant to your project
- **Skill**
  - Any data collection does involve some level of skill (to do properly)
  - May need to sub-contract out

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STEP 3: CAMPAIGN DESIGN

- Using results from your audience research
- Link together and identify best intervention
- **Minimize the barriers, maximise the benefits and outdo the competition**
- Accordingly, no generic intervention, depends on
  - Project aims
  - Results from research
- Good resources for the design of mobility management interventions
  - referenced in handout
- Focus on key social marketing principles here

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KEY CAMPAIGN DESIGN PRINCIPLES

- Design around the barriers identified
- Design around the benefits identified
- Compete with your competition

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DESIGN AROUND THE BARRIERS

- **Psychological barriers:** Negative attitudes/perceptions/low motivation/lack of confidence (PBC)
  - Need to change these into positive attitudes/perceptions/instil motivation/confidence
  - Via messages, information provision
- **Cost barriers:** Measures such as cycle loans, parking cash out payments, subsides public transport, season ticket loans, etc.;

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DESIGN AROUND THE BARRIERS

- **Safety barriers:** Cycle training, provision of safe cycle/walking maps, street lighting, improved crossing facilities etc.;
- **Informational barriers:** personal journey planning advice, timetables, route maps, contact numbers/website details for public transport providers.
- **Physical barriers:** Relate more to infrastructural barriers such as lack of/unsafe cycle/walking routes, or inaccessible/hard to use public transport vehicles- need to make safe and accessible
- The **key factor** here is to focus on those barriers that are the most important for your target sample
- **Focus your resources for a greater return**

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DESIGN AROUND THE BENEFITS

- Similar to barriers above, the main aim here is to design your campaign based around the potential benefits that people would realise if they switched to the travel mode [s] you are promoting.
- This would typically relate to highlighting aspects such as
  - Health benefits, exercise opportunities, greater enjoyment, stress reductions (not sitting in traffic jams), increased productivity benefits (e.g. been able to work on trains), relaxation benefits (e.g. been able to read a book), etc.
- As with barriers you should focus the campaign around the benefits identified in your audience research
  - More specifically those benefits most salient for the most people in your target sample.

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COMPETE WITH THE COMPETITION

- **Make the competition less attractive**
- **Raise the price of competition**
  - Could be achieved by either financial (e.g. introduce or raise parking costs) or psychological strategies (e.g. highlight problems such as congestion, fuel costs, environmental impacts and other negative aspects associated with car use).
- **Lower the cost of your *product*:**
- Again either financial (e.g. subsidized public transport tickets, parking cash out payments, cash incentives for walking or cycling) or psychological strategies (e.g. highlight the advantages of using car-alternative modes, such as health, time saving benefits).
- Some social marketing strategies in handout notes to assist in this sub-step

PILOT THE INTERVENTION

- **Essential sub-step**
- Test with members of your target sample
- You will know from target audience research potential intervention strategies (messages, measures etc.)
- BUT- need to know
- *Which ones work best?*

If you get it wrong now- there is no second chance

STEP 4: IMPLEMENTATION

- Although, included as separate step
- At this stage you should be ready to
- **Go ahead and implement**
- Lots of guidance available for traditional MM measures
- Social marketing campaigns often enhance traditional MM measures by marketing them to people in most effective way
- 4 useful strategies can help

PROMOTIONAL STRATEGIES

- **Aperture:** what is the best time and place to reach target group
  - Place campaign materials where (the most) people actually see them
  - Posters, event announcements etc.
  - Timing- better to promote walking/cycling measures in Spring/Summer
  - Take into account other campaigns
  - Link together- don't compete

PROMOTIONAL STRATEGIES

- **Exposure:** How often and from whom does the intervention have to be received if it is to work?
  - e.g. Posters- Where people see them (Aperture) and make sure left in place for sufficient time for as many people as possible to see them
  - Cycle training- some (many) people will need more than one session
  - Provide services according to target sample needs
  - Not when most convenient for you

PROMOTIONAL STRATEGIES

- **Integration:** How can I integrate a variety of interventions to act over time in a coordinated manner to influence the behaviour
  - Mix of methods used and more successful if integrate various methods with single focus
  - Using those identified in your audience research
  - Audience gets the same message from many credible sources
- **Affordability:** Do I have the resources alone to carry out this strategy and if not, where can I find useful partners?
  - Don't want to run out of funding 1/2 way through
  - Share the costs with other people with similar aims (organisations/projects)

STEP 5: EVALUATION

- I will not cover in any detail here (or notes)
- MaxSUMO
  - Most up-to date and comprehensive evaluation guide for MM (sustainable behavioural change campaigns)
- Pernilla will talk more on MaxSUMO tomorrow
  - *For anybody carrying out or funding mobility projects, it is important to demonstrate that the project has been successful and to justify the money invested. It is also crucial to understand why certain results have been obtained.*

Thank you
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