STEP BY STEP GUIDE FOR A SUCCESSFULL SOCIAL MARKETING BASED INTERVENTION

Introduction

Following on from the first session, this second instalment provides an overview of the key steps/stages that are involved in conducting a successful social marketing campaign. Whilst there is no real generic step-by-step guide to implementing transport-based social marketing interventions (due mainly to the range of different transport-based interventions available), I have tried to pull together all main recommended points (steps) from available guidance, and from practical experience gained form projects I have been involved in, which has resulted in 5 main steps. These are named; **Planning**, **Getting to know your audience**; **Campaign design**, **Implementation**, and **Evaluation**. Each of the 5 main steps contain additional sub-steps, although, not all steps (sub-steps) will not be applicable or required for all campaigns.

Further, although the steps follow in a ‘logical’ process in a sequential format, in reality the process can be more circular and iterative. You may therefore need to revisit an earlier step or jump ahead to fulfil some of the requirements for later steps.

In addition to describing the main steps and sub-steps, any specific cost and resource issues that are relevant to each step have been highlighted.

There are many available resources related to the design and implementation of (non-social marketing based) mobility management type interventions, which most of you will (should) be familiar with, and are referenced at the end. The purpose of these session notes are not to repeat this guidance in full, but rather to focus on those aspects that are most relevant to social marketing based campaigns.

Step 1: PLANNING

As with any project, **planning** is the first and arguably the most important stage. Unfortunately this is the one step that is sometimes missed, or not enough time is spent on it to be done correctly.

The key aspects that need to be addressed in the planning stage are to

- **Quantify the problem**: What behaviour are you trying to change?;
- **What is the desired behaviour?:** What are you trying to get people to do?;
- **Whose behaviour are you trying to change?:** Your target sample (segment [s]);
- **Set targets**: How many of your target sample are you trying to change and in what ways?.

1.1: What behaviour are you trying to change?

The initial step will obviously depend on the actual project and the project aims. For example, most sustainable transport type interventions focus on reducing solo car use, either generally, or to specific destinations (trip purpose), or parts of the city/town (e.g. city centre).

In most cases information about the problem is probably already known and knowledge of the problem has led to the reason for the intervention project.

1.2: What is the desired behaviour?

Again this will depend on the actual project and will typically involve switching solo-car drivers to more sustainable travel options, either to any sustainable alternative transport mode, to one or (more) selected sustainable alternative transport modes, for all their trips, or for specific trips (e.g. commuting, school runs, city centre) and to specific locations (origins/destinations).

Whilst the answers to these initial two sub-step questions may seem obvious, it is important to quantify these answers at the very beginning of the project, as in subsequent steps (sub-steps) you will be referring back to these answers as other decisions are made.

The answers to the above questions will allow you to set your project targets, determine both your segmentation strategy and also help inform the design of the actual intervention.

1.3: Whose behaviour are you aiming to change?

At a more general level the key questions are;

- Is the intervention to be targeted to the general population or to specific parts of the population?;

- Is the intervention to be targeted at specific locations?, or for specific trip purposes, and for specific modes?

Again, the answers to the above questions will determine both your segmentation strategy and also the design of the actual intervention.

Once these questions have been answered and you have identified the broad ‘group’ that you will target (your broad **Target Group**, e.g. commuters travelling to the city centre, parents driving their children to school, etc.) the next step (stage) is to

[1] Recruit those people who will participate in the intervention program, and once recruited;

[2] Establish the need for further segmentation and thus which segmentation approach to use.

In some cases this is straightforward, for example, if the aim is to target employees at a specific company (and you were the company implementing the project), you already know who these people are, and can easily access them (via staff intranet, letters from personnel etc.).

In other cases this process is less obvious and often there are various methods for recruiting the desired sample. A few examples are provided below.

Parents, you could;

- Enlist the help of local schools where their children attend to give out (or ask children to give out) information and/or questionnaires/arrange focus groups;
- Place posters around the school (or other locations) where parents would see;
- Approach parents outside of schools when they are picking up/dropping off children;
- Through local parent groups.

Car drivers, you could;

- Recruit at car parks;
- Contact car parking permit holders (at workplaces or residential locations);
- Advertise in the press (or other media)

Non-bus users

- Car driver strategies (see above).

You could also identify the targeted group [s] via a general household survey, although, many of the people you contact in this way will not be part of your target group. In this sense it would be a waste of your resources to adopt this broader strategy and wherever possible a more targeted recruitment strategy should be used.

Segmentation

Having identified at a general level your main target sample, you now need to be more specific and focus on sub-groups of the broader population- your **Segments.** As outlined in the first training session, there are many types and variants of segmentation approaches available. In choosing your segmentation approach and in terms of how to actually identify your segments, there is no ‘right’ or ‘wrong’. For example, as noted by Anable, Lane, & Kelay (2006a);

> *“Research on how best to define target groups of travellers is in its infancy. In the transport sector there have been very few attempts to define distinct mobility segments in a systematic and psychologically meaningful sense”.* (p. 12)

The choice of which type of segmentation approach to use is dependent on many factors including

- Resources available;
- Skill of those identifying segments;
- Who you are aiming to involve in the project.

Based on the main types of segmentation approaches outlined in the first session, the following sub-sections provide example questions that can be used to identify the different segment classifications, and where appropriate highlight any cost of skill issues.

Socio-demographic

Often it can be useful to divide interventions according to basic socio-demographic segments. For example, gender differences are known to exist in relation to personal safety concerns when using public transport services, i.e. females have greater concerns. In this example, it may be more prudent to focus resources on this gender segment if say the aim of the campaign was to highlight new safety measures on local buses. Also some projects aim to change the behaviour of groups according to a combination of socio-demographic factors (e.g. young males, older females, unemployed teenagers etc.) and the use of socio-demographic segmentation may be sufficient to achieve these aims.

In some cases basic socio-demographic data will already be available (e.g. employee personnel files), although, if not will need to be collected in some form of background survey.

Behavioural

As mentioned in the first session, for many interventions such as those aiming to increase public transport/cycling/walking etc., it is useful to establish peoples current travel behaviour and then segment into user/non-user, or frequent/infrequent groups. A very common (and standardised) method for obtaining frequency of mode use is to ask people to complete the following table.

Table 1: Standardised mode frequency use question

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.*										
	More than 5 days per week	**Every day (5 days per week)**	**4 times per week**	**3 times per week**	**Twice per week**	**Once per week**	**At least 2 or 3 times per month**	**At least once per month**	**Less than once per month**	**Never**
Car (as solo driver, on my own in car)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Car share - informal (with friends/partner etc.)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Car share - formal (as part of an official scheme)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Local bus	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Motorcycle	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Train	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Cycle	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Walk	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Taxi	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

NB: Include all relevant transport modes for the location of the study.

Based on the responses people give it is relatively easy to segment individuals into various segments, such as ‘Frequent’ (3 times per week or more), ‘Infrequent’ (less than 3 times per week) and ‘Non-users’, for each mode, or the modes you are most interested in. Depending on the project aims it may be more efficient to just target one (or two) of these segments. For example, if the aim is to promote bus use via the provision of trial bus tickets there is no real point in giving them to frequent users- ***there is no behaviour to change !,*** whereas for non-users and to a lesser extent infrequent users- ***there is !***

Attitudinal segmentation

As described in the first session there are various attitudinal segmentation approaches. The key considerations to which type to use will depend on factors such as skills of those collecting/analysing the data, and related to this, resources available. Specifically,

Skill: Whilst the simpler attitudinal segmentation approaches require little skill to identify the segment groups (i.e. perform the required analysis), some of the more complex attitudinal approaches entail quite sophisticated statistical analysis (e.g. Factor Analysis, Latent Class Analysis, K-Cluster Means Analysis);

Cost: If you do not have the necessary skills to perform this sophisticated types of analysis, you will have to pay (sub-contract out) this part of the social marketing programme.

Ability & Willingness

In order to identify the 'able' and willingness' segments, two simple questions are required;

[1] Ability measure: *'Would it be possible for you to use any alternative transport modes for your journey to from work?'* (Yes/No or Likert scale response)

[2] Willingness measure: *'Would you be interested in using any alternative transport modes for your journey to/from work?'*[1] (Yes/No or Likert scale response)

The two question responses can then be simply cross-tabulated to obtain the four ability and willingness groups (e.g. those that are willing and able, those that are unwilling and unable, etc.).

More complex attitudinal segmentation

Whilst ability and willingness segments are easily identified, for more complex attitudinal segmentation, considerably more skill and resources are required (see earlier). For example, the original Jillian Anable segments (Die Hard Drivers, Aspiring Environmentalist etc.) were initially derived by asking people to respond to about 100 attitudinal statements, and then subjected to various statistical analytical procedures (Factor Analysis and Cluster Analysis). The number of statements required to allow segmentation was then shortened to 10-12 core questions, although, still requires the same form of statistical analysis. Further, different people have used different questions to identify segments and there is no standardised guidance available.

More details of this type of attitudinal segmentation will be provided in the SEGMENT Project overview presentation.

Theoretical

As mentioned on the first session, one of the most recent segmentation approaches is the MaxSEM stage diagnostic method. To identify individuals' current stage position within MaxSEM, one simple question is required- see Table 2. Once you have identified individual's stage position, you can start making decisions such as;

- **Shall the intervention focus on just 1 or 2 stages?** For example, both those in the Contemplative and the Preparation/Action stage are at a higher stage of readiness to change behaviour than those in the Pre-contemplative stage, and it may be more cost efficient to target these two groups, or

[1] Different variations of these questions can and have been used, which result in the same broad ability and willingness segments.

certainly initially and then go back to the more ‘difficult’ (less likely to change) Pre-contemplators. These decisions will dependent on factors such as resources available- i.e. if you only have a limited budget it would be more cost efficient just to target 1 or 2 groups, as different intervention strategies will be required for those in different groups.

- **Use only those stages according to the planned intervention.** In many cases funding is often granted to implement a specific type of behaviour change programme (e.g. cycle training, awareness raising campaign etc.). Given that Perceived Behavioural Control (i.e. lack of confidence) is a key construct in MaxSEM that has (or may have) to be addressed to progress people from the Contemplative stage to Preparation/Action stage or to actual behavioural change, in this example, you may want to only involve contemplators as you target group for this type of intervention.

An example, of a project which has utilised the MaxSEM stage diagnostic questions and designed the intervention according to peoples stage position will be presented tomorrow (Hammersmith study), and the method further discussed in a later presentation by Pernilla Hyllenius.

Table 2: MaxSEM stage diagnostic questions

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[2]) **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*		**Stage allocation** (which stage are people currently in)
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

[2] 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.).

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

M = Maintenance; PA = Preparation/Action, C = Contemplative, PC = Pre-Contemplative

Barriers to change segmentation

Although, not specifically covered in the first session, another form of segmentation which is key to a social marketing approach relates to segmenting your target audience according to the specific barriers they are facing that are/would prevent them from switching to the new transport behaviour. Barrier identification is discussed more in the next step (getting to know your audience), although the main point would be to match your intervention to the main barriers to change that you have identified within your target group For example, if lack of knowledge about local bus services was identified as a barrier to use- the intervention solution would be to provide the relevant information.

Measures (required) for change segmentation

Again, not covered in the first session, and related to the barrier segmentation above, involves segmenting people according to the specific measures that would need to be introduced for them to change to a specific mode.

As an example, in a recent Scottish Government project (that i was involved in) that aimed to change the way people travelled to/from their workplaces in Edinburgh, we wanted to identify which measures would help them change to various alternative (to the car) transport modes.

Initially, we asked people to indicate (from a list) which alternative modes they could realistically switch to, and then from all the potential alternative modes they could switch to, which one would be the best/easiest for them- see Question 5 below. Depending on the best mode that people selected, they were then asked a further question to indicate which measures would be most likely to encourage them to actually change to this new alternative best mode- see Question 7 below (which related to potential cycling measures.

By focussing on just the modes people could actually switch to, more specifically their best mode, and then identifying the specific measures that have the greatest likelihood of success in changing their behaviours, this would allow you to more efficiently design your intervention via the selection of the most promising measures for your target group.

Conversely, if the measures to be implemented are already selected (perhaps as a condition of funding), you could then just select those people, who could switch to the mode associated with the mode the measures is aimed at, and also those people who have indicated it would help them change.

Q5: From the different alternative methods of transport you have indicated above please select the ONE mode that would be the best/easiest for you to replace some or all of your current car trips.

Car share- informal (with friends/partner etc.)	☐
Car share- formal (as part of an official car-sharing scheme)	☐
Walk	☐
Cycle	☐
Local bus	☐
Taxi	☐
Train	☐

*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.	**1. All** changes important to you	**2. Three *most important*** changes
Safer cycle routes?	☐	☐
Showers and changing facilities at my workplace?	☐	☐
Secure cycle parking at my workplace?	☐	☐
A free bike I could borrow?	☐	☐
A financial incentive for me to cycle rather than drive (e.g. daily or weekly payment)?	☐	☐
Cycle training/lessons?	☐	☐
A tax-free loan from my employer to allow me to purchase a bike/equipment?	☐	☐
Personalised information (on the best routes for me to cycle to/from my workplace)?	☐	☐
Nothing would encourage me to cycle (or cycle more often?	☐	☐
Other (please specify below)	☐	☐

Which type of segmentation approach to use?

A key question related to social marketing interventions relates to the best type of segmentation approach to use. The answer to the question relies on several factors, including the nature of the intervention, resources available and skills of the project team doing the intervention. As these factors will vary on a project-to-project basis, it would be hard to provide a definitive answer here, although, some of the main considerations are presented below.

Whilst both socio-demographic and behavioural segmentation approaches, are useful to identify ‘broader’ population segments, there are ‘likely’ to be considerable differences within these broader groups according to many factors including individuals’ attitudes, perceptions and willingness and ability to change. ‘Ideally’ further segmentation should be undertaken (according to these factors). For example, once say your main target groups has been identified (and recruited) you can quite easily ask this group to complete the ability and willingness segmentation questions. By combining these two approaches a *Homogeneous* group is now identified which allows you design a more targeted (and relevant) intervention, which is likely to increase the overall success of the campaign.

For example, if you focus on say males, in a specific age group, who are both able and willing to change, you could design a more personal targeted campaign directly for this group, that if you only identified males, in specific age group- as a lot of this broader groups may be either unable or unwilling to change (or both), and therefore less likely to actually change. Again, the same principles apply to using behavioural segmentation approaches (e.g. Frequent, Infrequent and Non users segments), i.e. use this type of segmentation approach first to identify your broad target sample, but then use additional segmentation to enhance your initial group selection, i.e. non users who are willing and able to change.

One of the main advantages of the MaxSEM segmentation approach is whilst it is very simple to use (see earlier), it already combines components of other approaches, i.e. peoples current travel behaviours (level of car use) and also their ability and willingness to change. Further as it is linked to MaxSEM, once peoples’ stage position has been identified, you can identify the most important attitudinal and perceptual determinants associated with each stage (see MaxSEM overview figure in first presentation) and focus on positively changing these constructs in your intervention, so that they progress through the behavioural change process to the ultimate goal of behavioural change- This is discussed further in Step 3, Campaign Design.

Irrespective of which initial segmentation approach is used, it also more useful to include either the barriers to change, or measures to change (or both) as the final step in the segmentation process as these are arguably the most informative approaches for informing the design of your intervention

However, whilst the main argument for segmentation is to identify segments as closely matched as possible, the more you segment any population, the smaller the segments become, and you do not want to end up with too small a final group.

Set targets

The final step of the planning stage is to set your targets for which you want your campaign to achieve. Overall goals for behavioural change projects, although varied, typically include improving air quality by reducing car emissions, reducing the number of people killed and injured in traffic accidents, reducing energy consumption, and/or by persuading car drivers to switch to more sustainable transport modes.

In order to successfully monitor and evaluate projects (i.e. to see if they have worked- see step 5) it is important to clarify what the project is attempting to do (i.e. its target goals) before the project actually begins. These targets must be set in an appropriate and constructive way and it is helpful to divide the overall goal into specific measurable sub-targets. One of the most common ways to do this is the use the SMART model.

SMART targets are:

Specific: Specific and clear targets should, as far as possible define, what is to be achieved preferably also in quantifiable terms. For example, *"Public transport mode share should increase"* is more specific than *"Improved modal split".* Even more specific would be *"Share of public transport should be increased by Y% for working trips in town X over the period Z"*.

Measurable: If targets are not formulated to make them measurable then they cannot be binding. For example, *"Share of public transport for working trips in town X should be increased from 20 % to 25 %"* is one such measurable target. This target requires a baseline study to establish the current modal split; in this case you need to know that the current PT modal share for working trips is 20 %.

Ambitious / Accepted: Ambitious and challenging targets encourage activity to achieve them, while targets that are easy to meet do not produce this effect. A target that "share of public transport should be increased by 0.5 % for working trips" would not produce any effect (or be measurable). The target should also be accepted by the project team and the funders.

Realistic However, it is important that targets are not so ambitious as to become unrealistic. The danger here is that if the targets are set unrealistically high then people consider them unattainable and consequently give up. The challenge is to make the targets both demanding but realistic.

Time-limited Targets should also be time-limited. This is necessary if the project and evaluation are to be efficient. For example, *"The share of public transport for working trips in town X should be increased from 20 % to 25 % between 2004 and 2006"* shows how a time-limited target can be formulated.

Source: Hyllenius, *et al*. (2009)

STEP 2: GETTING TO KNOW YOUR AUDIENCE

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

'Get to know them'

If you don't, it is likely that any intervention you introduce will not actually match up (or match up to as closely as possible) to your target sample's needs that are required for behavioural change to occur. In a social marketing context, getting to know them, this relates to;

- Identifying the main barriers that exist that prevent them from switching to the desired mode;
- Identifying the benefits that are associated with the alternative behaviour you are trying to promote;
- Identifying what the competing behaviour is doing;
- Additional factors that could be relevant to your campaign.

Various data collection methods are available to allow you to do this, which are briefly discussed later, as well as specific cost and skill issues in data collection.

Barriers to change

A key principle of successful social marketing campaigns is to identify the specific barriers (*exchange costs*) that are preventing your target sample from changing to the behaviour you are trying to promote. If you don't have this information it is very hard (impossible) to decide on the specific measures that could be introduced that would help them change to the new behaviour.

For example, barriers to change might include;

- Travel distance (too long)
- Travel time (too long)
- Lack of alternative options
- Weather conditions
- Restricted mobility
- Lack of confidence (Perceived Behavioural Control)
- Inconvenience
- Lack of flexibility
- Need to carry/transport items

- Need to transport family members
- Need to respond to emergencies
- No showers/changing facilities at destination (for cycling and walking)
- No cycle parking (cycling)
- Free car parking
- Negative perceptions of public transport (often misperceptions)
- Safety concerns (for self or children)
- Stigma associated with using alternative modes
- Parents won't allow it (for children)

For example see Derek Halden Consultancy (2003); Stradling *et al.* (2007); Transport Canada (2009).

Not all of these common barriers will apply to all interventions, and it is likely that you will identify other barriers (not included above) that may be specific to your target group, the alternative travel modes you are trying to promote, the location areas where you are conducting the intervention, and cultural specific barriers.

The most important points are to;

[1] Establish the specific barriers that relate to your target group, and then to;

[2] Identify which are the most important barriers (to the majority of people in your target group) as it may be more efficient to focus on and try and address these, and not all barriers, or those that just apply to a few people, and

[3] Identify only those barriers that you will have the potential to address in your intervention. For example, the scope of your intervention may be limited to a small package of mobility management type measures, and if one of the main barriers identified related to lack of public transport services operating in a specific area, you would not be able to provide this solution, and in this case, there may be nothing you can do for this specific sub-segment group.

Benefits to change

Similar to above, it is also extremely useful to try and identify the benefits that people would gain from switching to the travel behaviour you are trying to promote.

These benefits (which often mirror the barriers) may include aspects such as

- Time savings
- Cost savings
- Health/exercise benefits
- Increased convenience

- Independence
- Avoidance of traffic congestion
- Greater social participation
- Pleasure (avoid stress of driving)
- Environmental benefits
- Work/pleasure activity benefits (can read a book, catch up on emails etc. when using public transport)

For example see Transport Canada (2009)

The particular benefits will of course be more relevant depending on which alternative mode you are promoting, and also differ on an individual/segment level, as well as other factors such as cultural differences. As with identification of barriers the aim is initially to identify all potential benefits that are relevant to your target group and then identify which are the most important benefits, and use this information when designing your intervention.

Know your competition

As well as identifying both potential barriers and benefits to the mode [s] you are trying to promote, it is also important to know why people are currently using the mode they do- i.e. ***what the competition is offering*.** This is important as your intervention needs to compete with this, by counteracting any messages your competition is using. For example, many car manufacturers try and sell their products using adverts highlighting factors such as the ‘sense of freedom’ and ‘relaxation’ buying one of their products would give users, and the advert might show someone driving along a deserted road surrounded by beautiful scenery etc. This sort of strategy obviously works, otherwise they would not use it (i.e. people would not buy their cars). In this case the counter strategy would be to perhaps highlight to people that in reality if they drive in most city centre locations, they are more likely to be stuck in congestion and stressed, and that if they used local buses which travel along dedicated priority bus lanes, they could avoid the stress and have the freedom and relaxation they want.

As a guide to how you can get to know you competition, Kassirer & Lagarde (2010) suggest the following questions should be asked;

- What do people like about the competing behaviour?
- What do people dislike about the competing behaviour?
- What makes it easy for them to do the competing behaviour?
- What makes it difficult for them to do the competing behaviour?
- Who approves of them doing the competing behaviour?
- Who disapproves of them doing the competing behaviour?

These questions are simple and can be included in any questionnaire or form part of an interview or focus group guide.

Additional factors

As well as identifying the main barriers, benefits and what your competition is doing, there are other factors that can to be explored to allow you to design a successful social marketing campaign.

Role models

Try to identify the role models who your target group look up to/whose opinion they value as they can be very influential people to help persuade your target sample to change. For example this could be people who are already using the travel modes you are promoting, or could be people you would want to recruit to help promote and/or endorse your campaign.

Social norms

Social influences are known to be an important influence on behavioural choices and it is useful to identify what these are for your target group. For example, if the majority of their peer group are cycling, highlight this- people like to behave as other similar to themselves do (mostly).

Media habits

It is also useful to identify which types of media your target group typically use. For example, if none of your target sample read their local newspaper or listen to local radio stations, it would be a waste of resources using these media outlets to promote your campaign.

Key life moments

It is also well established that there are key life moments where people are more likely to change travel modes. These include moving to a new areas, having children, reaching retirement age, etc. Try and identify the 'key moments' when your target audience is most likely to try and take up the travel behaviour you are trying to promote, which can be useful when implementing your campaign.

Focussing on life moments is an important aspect of the ongoing EU SEGMENT Project- an overview of the project will be presented in one of the later sessions.

Data collection

There are several ways in which the various information sources above could be obtained, which can broadly be divided into Qualitative (focus groups and one-to-one interviews) or Quantitative (questionnaires) approaches.

See for example the Research Methods Knowledge Base for a good overview of the different types of data collection methods and the advantages and disadvantages of each type- http://www.socialresearchmethods.net/kb/survey.php

Learn from others

It is always useful to look at previous 'similar' campaign reports and data to find out what others have found or learned in their campaigns. I have referenced some social marketing websites and other resources at the end, although, quite often similar campaigns will have been conducted by other municipalities but not published widely, and you may be able to find this information informally, or there may be details on their local websites.

Practical considerations

One of the most important questions related to this aspect concerns cost issues. Obviously the extent of data collection that is performed in this step will determine how much it will cost. However, getting to know your audience is a critical step in any social marketing campaign and the key message is ***do as much as you can*** and ***do it properly.***

Ultimately, you want the research to help you make decisions, not just give you information. Further, you should only focus on conducting research that is relevant to your specific project, otherwise you are wasting resources. For example, wait until you have identified your final target group, then focus only on finding out about them, not other groups, or if your campaign does not have enough resources to afford mass media promotions, you don't need to identify which mass media outlets are relevant to your target group.

In addition to cost issues, any data collection method does require a certain amount of skill to perform correctly, for the design of questionnaires or interview/focus group guides, how they are administered and analysed. Unless you/your organisation possess this experience and skill, it may be that this aspect of the project needs to be sub-contracted out, or at least expert advice sought.

STEP 3: CAMPAIGN DESIGN

Using the results from your getting to know your audience research, the aim of this next step is to then link these strands of research (e.g. barriers, benefits and competition) to identify the best possible intervention that will address these issues.

In short the aim is to;

Minimize the barriers, maximise the benefits and outdo the competition

Accordingly, there is no generic intervention *per se*, as it will depend on the project aims, your segment group and also the results that evolve from your audience research. There is also some good guidance documents related to the design and implementation of various potential mobility management type measures which are referenced later. Rather than go over this guidance here, focus on the key principles associated with social marketing that can enhance these available guidance.

In transport related behavioural change programs this typically is on how you promote the actual mobility management types services you will be providing.

The key underlying principles to design a successful social marketing campaign are as follows;

- **Design around the barriers identified.**
- **Design around the benefits identified**
- **Compete with your competition**
- **Remember the 4 P's**

Designing around the barriers

Depending on the barriers to behavioural change that you have identified that are most relevant for your target group, and those that you would be able to change in your intervention, there are a number of intervention strategies that can be employed. For example, for;

Psychological barriers: These are aspects such as negative perceptions/attitudes towards alternative mode, lack of confidence, or skills to use alternative modes, lack of motivation

Changing attitudes: Provide information perhaps highlighting the benefits/positive aspects of the alternative travel behaviour you are promoting- Changing attitudes and perceptions was the main focus of the Hammersmith study which is presented later in the training programme;

Social norms: Posters showing peer group members (or other important people) using the mode you are promoting;

Low 'Perceived behavioural control' (confidence): Provide personal advice and support, perhaps accompany people on their first few bus trips, provide cycle training etc.;

No behavioural goal (motivation): Ask people to make a pledge, form a commitment to try/switch to the behaviour you are promoting;

Personal barriers: This typically involves strategies to make it easier for members of your target sample to access and use the alternative modes you are promoting, and are typically infrastructural measures (low floor buses, bus bays, access ramps etc.), but can also include measures such as 'bus escorts', driver training etc.

Physical barriers: Relate more to infrastructural barriers such as lack of/unsafe cycle/walking routes, or inaccessible/hard to use public transport vehicles.

Cost barriers: Measures such as cycle loans, parking cash out payments, subsides public transport, season ticket loans, etc.;

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.

The key factor here is to focus on those barriers that are the most important for your target sample, and only on those barrier solutions you can actually address in your campaign.

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 the 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.

Compete with the competition

The main aim here is to make the competition less attractive to your target sample, which can be achieved by either;

- **Raising the price of the competition**: which 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***: which again could entail 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).

Social marketing based strategies
To assist you in designing your campaign (taking into account the benefits, barriers and competition), there are a number established strategies.

[1] Make it easy-to-irresistible for your audience to act

As noted earlier, social marketing includes the concept of exchange - the assumption that people behave in certain ways in exchange for benefits they hope to receive. The underlying principle here is that if people believe that something benefits them, they will take action. If they believe there are more costs than benefits to taking action, they typically will not do so. The aim of the social marketing intervention should be to identify the 'tipping point', i.e. identify the point where people believe there are enough benefits to outweigh the barriers, or that the benefits matter more than the barriers (Smith reff 2008

[2] Allow them to 'kick the tires'

In some cases it is appropriate to allow your target audience to 'try before they buy'. This is a tried and tested approach used in commercial marketing and it allows consumers to experience a product before making the full commitment to purchase. In mobility management type projects the most common application of this principle is to provide people with free trial bus tickets (often with accompanying route and fare information etc.).

This approach can be very effective in situations where you have identified low confidence ('Perceived Behavioural Control/Self Efficacy') as one of the main barriers, and by allowing people to try out the alternative services (perhaps with an accompanying guide/companion)

It can also be useful to correct any miss-perceptions people have about your alternative service, in that they can

From a theoretical perspective this type of intervention can be useful to all those people in the Contemplative stage, or Preparation/Action (who have not yet actually tried the new behaviour) but are already thinking about change, and just need a little help 9or push) to actually make the change.

However, in all the examples above, the public transport services have to be good- first impressions count, and whether their experience is positive or negative will impact on their future decisions to use public transport again, or not.

[3] One step at a time approach

Asking people to change their travel behaviour completely can be a major step for many people, and it is often more effective to get them to try a new behavior first, perhaps using the trial public transport tickets measure (see above), or at, or during short term events (such as bike-to-work week, leave your car at home day, etc.), and then to encourage them to increase of the new modes incrementally, or at least for some of their future trips. For example, car share for their commuting journeys, cycle for small shopping trips, walk their children to school etc.

[4] Make your product 'look and feel good'

It is well known in traditional marketing that customers prefer products that are presented well (attractive) and reliable. This principle should apply to anything produced as part of your intervention, e.g. posters, information packs, freebie incentives, etc. If you give people items that are poorly manufactured, don't work, or look cheap, it can undermine the whole credibility of the intervention. Obviously, this does have cost implications, although, the underlying principle should be ***quality not quantity***, and depending on budget availability it may be better to produce less items of higher quality, than more or poorer quality.

[5] Reward the new behaviour

The use if incentives can play an important role in encouraging people to both try and maintain the behaviours you are trying to promote. There are various incentives that can be introduced as part of the wider social marketing campaign that will enhance the campaign. These include, providing free public transport passes, or offering subsidized travel cards, parking cash out payments (e.g. paying people a one-off/daily/weekly cash payment for not driving to work), cash payments for cycling, walking or car sharing (to work), parking charges or increased parking charges, preferential parking for car sharers, hot drinks/snacks for people who walk/cycle to school work, or small gifts such as pedometers, water bottles etc..

[6] Making a commitment

Another successful strategy is to ask people to make a commitment towards the alternative travel behaviour you are promoting. This can help keep people motivated (committed), and from a theoretical perspective assist people to form goal and behavioural intentions, which are both key threshold points that they need to progress through within the behavioural change process.

Pilot the intervention

Finally and most importantly, once you have decided on and designed your intervention materials, they needed to be tested with members of your target sample. This can be critical to the success of your campaign as whilst the results of your research (getting to know your audience) will (should) have led to the development of a ‘set’ of possible promotional messages and ‘message carriers’ (the media you will be using), it does not answer the questions- which will work best?

STEP 4: IMPLEMENTATION

Although, I have included implementation as a separate step, by the time your reach this step most of the important decisions have been made in earlier steps- and at this stage you are (or should be) ready;

to go ahead and implement your campaign

Again for typical mobility management type measure interventions there is lots of available guidance on how you should best implement the different measures (referenced at the end) and this guidance will not be repeated here.

In most cases the role of social marketing is to enhance these traditional mobility management type interventions by ensuring they are marketed to potential users in the most effective way. I have therefore just focussed on some of the promotional strategies that can be used in social marketing campaigns.

There are 4 key questions to think about in order to make your promotional tactics more powerful.

- **Aperture:** What is the best time and place to reach members of our audience so that they are the most disposed to receiving the intervention?
- **Exposure:** How often and from whom does the intervention have to be received if it is to work?
- **Integration:** How can I integrate a variety of interventions to act over time in a coordinated manner to influence the behaviour?
- **Affordability:** Do I have the resources alone to carry out this strategy and if not, where can I find useful partners?

Aperture
Aperture relates to the time and place when/where your target sample is exposed to your campaign.

Perhaps obviously, you need to place campaign materials such as posters, event announcements in places where people would actually see them, or more precisely where the greatest number of people would see them. Sometimes cost is the main consideration when deciding on location, although, if no one is actually exposed to the materials, it can be a false economy.

Timing is also a key issue, and the aim is to ensure that you time your campaign to have the greatest potential effect. For example, a campaign to promote walking or cycling is likely to be less effective if launched in the winter, compared to a spring/summer launch. You also need to be aware of what other organisations within your area are planning/doing before deciding on the timing of your implementation. For example, if another organisation is launching a ‘similar’ campaign (or a similar campaign is ongoing) targeting the same target sample as yours, with similar aims, you may want to either try and link to their campaign launch (partnerships later), or postpone your launch. This is to ensure your target sample is not for example forced to choose between two events, or been exposed to two different (competing) campaign messages, both with the same aims.

Exposure is how many times and how large of an audience is exposed to your intervention [s].

Exposure is usually thought of as a mass media variable called reach and frequency, i.e. How many times does someone have to see a television advert or campaign poster to be influenced by it? In traditional marketing this is known as 'rating points'- the percentage of target audience reached multiplied by the number of times they will see the message (frequency). For example, in relation to posters, the key factors here are to make sure that you place them [1] where people in your target audience will actually see them (Aperture), but also to ensure they are left in place for sufficient time to ensure as many of your target group as possible will see them.

Exposure also relates to non-mass media interventions. For example, one of the most powerful measures to encourage cycling is to provide cycle training. In this case, for some people this may require several sessions, and yet in many cases cycle training is implemented as a one-off service, perhaps taking place as part of a local or National one day event. In this example, the key is to provide the service according to the needs of your target sample, not to when it may be most convenient to hold the training sessions.

Integration

Integration is the mix of methods to reach your target audience and campaigns are typically more effective when they integrate various methods (mass media, face-to-face, print, etc.) within a single coherent focus. Your campaign will have a greater effect if your audience gets the same message from many different credible sources, rather than just one.

Affordability- Can you afford it?

Again given the importance of cost, a key question that needs to be answered for any social marketing interventions relates to whether you have (or allocated) sufficient resources to implement the full campaign- The last thing you want is to run out of funding half way through.

One strategy to make the implementation of your campaign more affordable is to share the cost with others. In most cities/regions you will not be the only people who are attempting to change your target sample's behaviour, and will probably have similar aims (new behaviours targeted) as others. Related to aperture earlier, if another organisation is hosting an event you could link the two campaigns together and share the costs.

STEP 5: EVALUATION

Whilst full guidance on how to evaluate a social marketing campaign will not be covered in this training session, I have provided a link to the most up to date and comprehensive evaluation guide (i.e. MaxSUMO), and an overview of this guide will be presented tomorrow.

In social marketing campaigns, evaluation is essential throughout all stages of the marketing process. Once your intervention has been implemented it should be monitored on a regular basis to ensure it is reaching your target sample and having an effect. As behavioural change often takes time to occur, you might only know these effects at the end of the campaign, although, measuring indicators such as awareness of measures been offered, satisfaction with services provided, and propensity towards behavioural change (reflected by changes in attitudes, MaxSEM stage position) can provide invaluable feedback on the campaigns progress, and if required allow you to revise aspects where problems are occurring.

It is however, useful to provide a summary of **why projects should be evaluated?**, and equally important **evaluated properly**, and also the **different evaluation design methods** that are available to allow you to evaluate properly. All of this guidance is taken from the MaxSUMO guide.

Why evaluate?

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. Evaluation in accordance with MaxSumo permits project monitoring both during and after the project and offers an opportunity to compare projects with each other and understand what has worked and why. By considering the whole process up-front, it is easier both to monitor the individual project and for future projects to benefit from the experiences of the current one.

MaxSumo offers an opportunity to systematically and effectively plan, monitor and evaluate all mobility projects and programmes aimed at behavioural change. It provides standardised guidance for all the necessary steps, e.g. when setting targets, defining target groups, selecting measures etc. MaxSumo also builds on the idea of conceptualising the behaviour change process as a series of stages which individuals progress through in order to reach the final desired stage of behavioural change. The level-based system makes it possible to measure results of a project at an early stage and, if needed, take possible corrective action, if the results are not promising enough.

Users of MaxSumo can be local city planners, transport planners, their consultants, other persons in organisations dealing with influencing citizens´ mobility patterns or persons working with mobility management for example in companies or schools.

Before further highlighting the main benefits of monitoring and evaluation, it is useful to define them:

- ***Monitoring*** *is the collection, storage and compilation of data in a systematic way and describes what has happened and what impact has occurred. Monitoring is the basis for evaluation but lacks the explanation why.*
- ***Evaluation*** *assesses the data collected in a systematic manner. It involves a deeper analysis of the impact, seeks to explain why a change has occurred and helps in drawing conclusions about cause and effect (i.e. is any observed behaviour change directly attributable to the intervention implemented).*

In short, monitoring refers to what has happened as a result of the intervention and evaluation refers to why these changes have occurred.
The main benefits of using MaxSumo to perform evaluations are:

- ***Improved project management and tracking achievements of objectives*** *- Projects benefit in efficiency if monitoring and evaluation is used both in initial planning and throughout the implementation stages, and as a permanent process to help in steering the project and reaching real results. The result provides feedback to the work team, the decision makers and the people affected by the measure. Early results are also helpful in establishing whether the project is actually coming closer to its objectives or not. Sometimes the direction of a project must be changed. Monitoring helps us to see where adjustments might be necessary. In this sense, evaluation is simply a management tool providing feedback and aiding accountability.*

- ***Evaluation helps in the learning process*** *- Monitoring and evaluation provide a chance to compare results with results of other, similar, projects that have also been evaluated. This benchmarking provides a build-up of knowledge that would otherwise not be possible. Sharing experiences also help others learn what worked, as well as about what did not work out so well.*

- ***Enhance knowledge about cause and effect relationships*** *- Better measurement, documentation, monitoring and evaluation can provide better insight into impact on behavioural change. In the longer term this offers significantly improved opportunities to produce verified cause and effect relationships. These can then be used to calculate and predict the expected results of future mobility projects.*

- ***Provide data to help future decisions and investments -*** *Measuring cost-effectiveness of MM measures implemented is an explicit goal for decision makers and funders and evaluation helps establish these costs*.

Despite the benefits highlighted above, many mobility projects are not evaluated at all. It may be that you (or the funders) do not think that spending additional money of evaluation is justified, or perhaps you are not sure how to perform an evaluation at all. We hope the arguments provided in MaxSumo will convince you and your project funders of the importance and value of proper evaluation.

Evaluation design

There are three main design types of evaluation available, namely;

- Control group design;
- Comparison group design, and;
- One group design.

Control group design
The most reliable way to establish cause-and-effect is through the use of a pre-post **control group design**. This measures behaviour before and after the intervention and compares the travel behaviour in the target population (i.e. *intervention group)*, with the behaviour in a group that has not been exposed to the intervention, (i.e. the *control group)*.

To illustrate how this design can be applied to a mobility project, an example from the MaxSUMO guide is provided below.

A travel awareness campaign intends to target the population living in a housing area in a suburb of a large city and aims to persuade them to use public transport (i.e. the bus) rather than the car for trips to the city centre. The intervention consists of information packs about local bus services delivered to people in the target area. The campaign starts with a 'before' questionnaire survey with a representative sample of residents for collecting baseline information such as their current travel habits , their attitudes towards switching to the bus for some / all of these trips (i.e. how ready are they for change using the MaxSEM stage-diagnostic questions), and other socio-demographic data.

The residents would then be randomly assigned[3] *to either the intervention group (those who receive the information packs) or the control group (those who do not). The random assignment makes sure that both groups are similar and only differ in their exposure to the intervention. After the awareness materials have been sent to the intervention group only, a suitable timescale would be allowed for people to digest the materials and perhaps change their current travel behaviour. An 'after' survey would then be conducted with both groups using the same questions as the before survey. Additional questions related to the actual materials, such as do people like them, are they useful could be included for the intervention group.*

Finally, the responses from both groups can be compared, and any differences between them can be attributed (with confidence) to the actual awareness campaign, as other effects have been controlled for. For example, if 15% of the intervention group and 10 % of the control group are now using the bus for their trips, one can conclude that the awareness campaign has resulted in 5 % increase in public

[3] Random assignment means that every participant (resident in this case) has an equal chance of been assigned to either the intervention or control group. This can easily be achieved by dividing the sample into two separate piles by hand (e.g. first three into pile one, second three into pile two, third five into pile one, etc.). If a list has been created in an electronic format, you can often use automated procedures to randomly allocate people into the two groups

transport use. Similarly, it may be observed that 15 % of the intervention group and 10 % of the control group have moved from being pre-contemplators to contemplators. It can be concluded that the information packs for the intervention group have resulted in moving 5 % of them to a higher stage of readiness to change their travel behaviour. As these 5 % are now more ready to change behaviour (i.e. try out the local bus services), this knowledge supports the local authority (who implemented this campaign) to decide a follow-up project specifically targeting this 5 % using other methods, such as providing them with free travel tickets for the bus.

Comparison group design

For many mobility project interventions, especially those which target whole populations, such as travel plans for schools, or a city-wide mass-media awareness campaign, it would not be possible to identify 'true' control groups, as every individual within the population would be exposed to the intervention. In these instances a pre - post **comparison group design** should preferably be applied. This design is similar to the control group design but it uses a 'comparison' group from a different population to be compared to the intervention group. The key issue for the success of this type of design is to ensure that the two separate groups are as closely matched as possible on all factors known to influence modal choice decisions, such as access to public transport services, income levels.

For example (from the MaxSUMO guide), *if the mobility project implemented was a school travel plan, it would be extremely unlikely that you could identify a sub-group of school pupils at that particular school that was not exposed to the travel plan initiative (i.e. a control group). In this example, another school with pupils of similar ages, living in similar areas in terms of public transport accessibility, with the same initial mobility behaviour within populations of similar socio-demographic profiles can be used instead. The same process with before and after surveys as for the control group design is then followed.*

One group design

If it is not possible to find a control or a comparison group, a pre-post **one group design** should be used. In this study design, the mobility behaviour of the same group is surveyed before and after the intervention. For example employees of a company will be surveyed about their travel behaviour before and after the implementation of a travel plan. In many cases where an adequate control or a comparison group cannot be found this is the only feasible way to examine the effects of a MM intervention. Here it is of special importance to take into account other factors that may affect the target group's behaviour and also to ask for the reasons for any change observed. For example an increase in cycling instead of driving can be a success of a bike-to-work campaign, but can also be a result of rising petrol prices, selling the car or moving closer to the workplace. The contextual conditions should be considered and be taken into account when drawing conclusions from the results. This evaluation design is not as reliable as the control group design in establishing cause and effect relationships, but it can give a lot of valuable results for a single MM intervention – for example, whether specific targets have been reached, whether measures are accepted and how the mobility project has worked. When different MM measures are evaluated in the same way they can also be compared to each other which will give valuable input to future decisions.

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