



CiViTAS
Cleaner and better transport in cities

VANGUARD
.....

Resource Pack

Training Workshop

Organising an individualised social marketing campaign for sustainable solution in cities

Toulouse, France
17 and 18 May 2011



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Introduction

Social marketing refers to the use of marketing principles and techniques for the social good. The approach works by attempting to influence a predefined target audience to voluntarily accept, reject, or modify a behaviour, for the benefit of themselves and/or society as a whole – for example, enticing people to use more sustainable transport modes. Based on knowledge of individuals' preferences and needs, tailor-made measures, promotional materials and activities can then be developed for each person, and growing evidence suggests that this approach is more effective to change people's attitudes and behaviours than traditional 'one-size-all' communication and information campaigns.

On 17 and 18 May 2011, **CIVITAS VANGUARD** is organising a training session on Individualised Social Marketing. The programme is composed in collaboration with the main trainer: **Michael Carreno** (Edinburgh Napier University). This is the fourth CIVITAS training, as similar trainings have taken place on the topics of 'Stakeholder consultation and citizen engagement' (November 2009), 'Communicating with the Citizen' (February 2010) and 'Company Travel Planning' (November 2010). Like its predecessors, this training will include a blend of theory, practical tools and exercises designed to provide urban transport professionals with new ideas and solutions that you can apply to individual initiatives. The aim of these trainings is to support CIVITAS Plus cities and other cities interested in sustainable transport solutions.

About this resource pack

This training will introduce participants to the general concept of individualised social marketing with an emphasis on the benefits. All aspects of an individualised social marketing campaign are covered including the planning, implementation and evaluation stages with a focus on the main *do's* and *don'ts* to ensure the campaign is a success. As market segmentation is an important part of individualised marketing, considerable time will be dedicated to this important aspect from both a theoretical and a practical point of view. A number of inspiring good practice examples will be provided to illustrate how others have used segmentation to enhance the success of campaigns they have implemented skills.

This resource pack offers you several (hyperlinks to) background articles, structured according to the training programme:

- (1) Individualised Social Marketing: what's in a name?
- (2) A generic STEP-by-STEP guide to organise an individualised social marketing segmentation campaign
- (3) practical examples, experiences and tools.

Additional to the training activities, CIVITAS VANGUARD hope these articles and tools may help you in addressing Individualised Social Marketing as a smart approach and in implementing it in your own practice.

NOTE: this resource pack is a very concise compilation of references. For more information on the contents of this training and more reading tips, please consult the brief **training report** and the detailed **training notes** compiled by trainer Michael Carreno. They will both be available in the CIVITAS Download Centre after the training.

<http://www.civitas.eu/downloadcenter.phtml?lan=en>

Individualised social marketing: Overall background

Definition of social marketing

“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” (p.7)

Andreasen, A. (1995). *Marketing social change: changing behaviour to promote health, social development, and the environment*. San Francisco, CA: Jossey-Bass.

Definition of segmentation

“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” (p.1)

Sullivan, C. & O’Fallon, C. (2008) *Segmentation research for sustainable transport: do’s and don’t’s*. Paper presented at 32nd Australasian Transport Research Forum.

http://www.patrec.org/web_docs/atrf/papers/2009/1756_paper103-Sullivan.pdf

Training notes

In the full edition of the training notes compiled by Michael Carreno, the concept of individualised social marketing and its history is explored in greater detail. The notes also raise the questions of whether social marketing is effective and how much it costs. They devote a great deal of attention to (different types of) segmentation as this is one of the key components of social marketing.

The training notes will be available in the CIVITAS Download Centre after the training.

<http://www.civitas.eu/downloadcenter.phtml?lan=en>

UK National Social Marketing Centre (NSMC)

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>

Tools of change website

The North-American ‘Tools of change’ website 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>

MaxSEM

The recently completed FP6 project MAX-SUCCESS developed a new theoretical framework on segmentation: the “Max Self Regulation Model” or MaxSEM. It divides people in four categories based on what stage of behavioural change they are in. For each stage, it defines the key factors that need to be fulfilled before an individual can move to the next stage. It can also serve as a guideline for the evaluation of behavioural change programmes.

<http://www.epomm.eu/index.phtml?ID1=2360&id=2360>

Reducing Car Use!? Just do it!

Brög, W. (Socialdata) – 2003

This lecture explains the reason why dialogue marketing is so successful, why people may change their travel behaviour on a voluntary base and how this works. It was produced by Socialdata, a German organization that developed a well-known individualized marketing technique called IndiMark®. The technique is based on direct dialogue with individual

households. It has been applied in Australia, the UK and North-America in a programme called TravelSmart®. The Socialdata website (www.socialdata.de) features many interesting resources in its Publications section.

http://www.socialdata.de/info/Car_use.pdf

TravelSmart UK: http://www.sustrans.org.uk/assets/files/travelmart/behaviour_change_ff36.pdf

How to organise an individualised social marketing segmentation campaign? Step-by-step

Training notes

In the full edition of the training notes, Michael Carreno compiled a step-by-step guide for implementing an individualised social marketing campaign. Based on a collection of guidance documents and his own experiences, Mr. Carreno distinguishes 5 important steps in the implementation process. Perhaps the most important step is the first one: *planning* carefully what exactly you want to achieve and who you want to reach. The practice of segmentation (discussed in the first session), is now applied to the actual campaign planning process. In a second step, you should *get to know* as much as you can about your target audience, in order for your campaign to match their needs. In a next step, Mr. Carreno summarises the main principles to keep in mind when *designing your campaign*. The fourth step describes the promotional strategies you can apply during *implementation*. Finally, the importance of *evaluation* is discussed, along with the three main evaluation design types.

The training notes will be available in the CIVITAS Download Centre after the training.

<http://www.civitas.eu/downloadcenter.phtml?lan=en>

Social marketing behaviour: A practical resource guide for social change professionals

Smith, W. A. & Strand, J. (Academy for Educational Development) – 2008

In this book – fully available online – the authors help you think like a marketer to understand the reasons that drive people's behaviour. It defines marketing as an exchange where you have to offer your target audience something they want, and not just what you think they need. The book presents a practical checklist – the BEHAVE model – for answering the vital questions for your campaign design. It also goes deeper into behavioural science to give you an insight in the very nature of human behaviour.

<http://www.aed.org/Publications/loader.cfm?url=/commonspot/security/getfile.cfm&pageid=33595>

Changing transportation behaviours - A social marketing planning guide

Kassirer, J. & Lagarde, F. (Transport Canada) - 2010

This brochure was compiled by the Canadian Transport authority. It contains case studies and a practical step-by-step guide for all those interested in influencing travel behaviour by setting up a social marketing campaign.

<http://www.tc.gc.ca/eng/programs/environment-urban-menu-eng-2054.htm>

MaxSumo: Guidance on how to plan, monitor and evaluate mobility projects

Hyllenius, P. & Smidfelt-Rosqvist, L. (Trivector Traffic); Haustein, S. & Welsch, J. (ILS); Carreno, M. & Rye, T. (Edinburgh Napier University) – 2009

With MaxSumo you can effectively plan, monitor and evaluate Mobility Management projects. It provides standardised guidance during all steps of your project, e.g. when setting targets,

defining target groups, selecting services and mobility options. In this way, you break down the complex process of behavioural change into smaller steps that can be monitored and evaluated successively.

also available in [DE](#), [ES](#), [FR](#), [NL](#), [PL](#), [PT](#), [SE](#) at

<http://www.epomm.eu/index.phtml?ID1=2359&id=2359>

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http://www.socialdata.de/info/Car_use.pdf

Practical examples, experiences & tools

1. The Hammersmith Study

The Hammersmith study is a successful individualized awareness raising campaign targeting people who drive their car into the London borough of Fulham and Hammersmith (UK)

Over 500 car drivers were recruited as they left a car park in Hammersmith, London and interviewed about their travel choices for driving into Hammersmith and their attitudes towards car use and environmental issues more generally. Based on these interviews, the project team designed and distributed information booklets about alternative transport modes containing theoretical-enhanced messaging and photos to entice participants to get them to think about how they currently travel and the different options open to them. Evaluation of the project showed the theoretically-based targeted materials to be significantly better at changing peoples' attitudes towards sustainable travel choices and actual behaviour, compared to standard (non-theoretical) information materials.

More information

<http://www.tri-napier.org/current-tri-projects/current-tri-projects.html>

2. EU project SEGMENT

The ongoing EU-project SEGMENT (STEER; 2010-2013) has developed and tested a new market segmentation model targeted at people undergoing a change moment in their life, e.g. new residents, new university students, families with young children, people with a change in job or job location.

SEGMENT tests the use of consumer market segmentation techniques in persuading people to change their travel behaviour and adopt more energy efficient forms of transport. This project seeks to maximise the impact of the campaigns through the use of two segmentation techniques:

- 1) Targeting consumers undergoing ‘life change moments’ which cause them to question and reconsider their travel habits.
- 2) Clustering these consumers (through the use of detailed questionnaires) into relatively homogenous groups (in terms of their attitudes towards car use, cycling, electric vehicles or wider issues such as climate change and health etc) and then devising bespoke campaigns which are informed by these findings.

The new approach is tested in 7 EU-cities and focus on 4 life change moments as shown in the graph (take from the SEGMENT survey training workshop (14th September 2010).

| | New employees | Start /change school | New residents | University students | Other |
|-------------|---------------|----------------------|---------------|---------------------|-----------------------|
| Hounslow UK | ✓ | ✓ | | | Health centres |
| Almada PT | | ✓ | ✓ | ✓ | |
| Athens GR | | ✓ | ✓ (?) | ✓ | |
| Sofia BG | ✓ | ✓ | ✓ | | |
| Utrecht NL | ✓ | ✓ | | ✓ (*) | |
| Gdynia PL | ✓ | ✓ | | | First baby day care |
| Munich DE | | ✓ | ✓ | | New foreign residents |



Intelligent Energy Europe

First results of the experiences with the surveys are currently available (May 2011) and shared in the CIVITAS training in Toulouse. The SEGMENT website already features some deliverables, questionnaires in several languages and other interesting materials.

More information

<http://www.segmentproject.eu/>

3. Personalised travel planning

Introduction

Experiences with a well approved concept of individualised social marketing in Brighton (UK)

Personalised travel planning is probably the most wide spread application of individual marketing throughout Europe. Brighton was one of the pioneering cities. It has recently completed its fifth year. Personalised Travel Planning in Brighton & Hove engaged directly with thousands of residents. The method, experiences, challenges and opportunities will be presented.

More information

<http://www.brighton-hove.gov.uk/index.cfm?request=c1186034>

http://www.journeyon.co.uk/events_95.asp

4. Using the market segmentation model (MaxSem) in an evaluation tool (MaxSumo) within the context of a company travel plan

In a number of companies in Sweden, both travel surveys and a simple market segmentation method (based on the theoretical behavioural change model-MaxSem) have been used in mobility surveys as part of wider companies travel plans. The benefits of this approach are twofold. Firstly, mobility management measures can be chosen and designed more accurately, focusing on individual's current travel behaviours, barriers to modal shift and their attitudes towards car driving behaviour. Secondly, following the interventions, it is possible to assess both the change in overt behaviour as well as more subtle changes in attitudes and perceptions, and thus a more comprehensive evaluation is obtained.

More information

The presentation of this case study will be available in the CIVITAS download centre after the training.

<http://www.civitas.eu/downloadcenter.phtml?lan=en>

5. Other case studies

The Netherlands: Managing mobility during road works

De Munck, G.B.G. – 2007

In 2006-2007, a major scheme of works was carried out on the Dutch highways. To keep inconvenience for the public to a minimum, a mobility management scheme was developed which offered cheap or free public transport during the works. Personalised travel advice was given to commuters.

<http://www.ectri.org/YRS07/Papiers/session-1/De%20Munck.pdf>

UK: The effects of smarter choice programmes in the sustainable travel towns

UK Department for Transport – 2010

The British Department for Transport ran a 10 million pound program on marketing and travel awareness in 3 cities in the UK. The results were great. This is the full independent report that was commissioned to evaluate the results from the 'Sustainable Travel Towns' - Darlington, Peterborough and Worcester. These towns implemented packages of 'Smarter Choice' measures, which resulted in increases in cycling, walking and bus use, and decreases in car use. Chapter 6 focuses on Personal travel planning.

<http://www.dft.gov.uk/pgr/sustainable/smarterchoices/programmes/>

TravelSmart Australia

The Queensland Government in Australia launched the world's largest individualised marketing project in 2009, and the implementation stage has just come to a close with around 320,000 households in Brisbane, the Gold Coast and the Sunshine Coast being treated under the TravelSmart Communities programme. Results of the two-year evaluation process will be available by the end of 2011 (conducted by WorleyParsons, paul.henderson@WorleyParsons.com).

Evaluation of Australian TravelSmart projects 2001-2005:

<http://www.travelsmart.gov.au/publications/pubs/evaluation-2005.pdf>

TravelSmart UK: http://www.sustrans.org.uk/assets/files/travelsmart/behaviour_change_ff36.pdf

Case studies on www.epomm.eu

- Individualized Marketing for older citizens - Munich, Germany
http://www.epomm.eu/study_sheet.phtml?sprache=en&study_id=2861
- Create Smart traveller through direct marketing – Lund, Sweden
http://www.epomm.eu/study_sheet.phtml?sprache=en&study_id=1976
- Mobility Manager provides information on mobile information stands - Aalborg, Denmark
http://www.epomm.eu/study_sheet.phtml?sprache=en&study_id=1946
http://www.epomm.eu/study_sheet.phtml?sprache=en&study_id=1945
- Engaging senior citizens in sustainable mobility: Smart Mobile Senior Citizens - Belgium
http://www.epomm.eu/study_sheet.phtml?sprache=en&study_id=1894
- The traffic safety campaign "0.0 for friends" - Austria
http://www.epomm.eu/study_sheet.phtml?sprache=en&study_id=1347
Going to training using sustainable transport - Switzerland
http://www.epomm.eu/study_sheet.phtml?sprache=en&study_id=1352