

Guidelines on the SmartMove AMC-concept

Deliverable D3.3

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1 Introduction

1.1 Background

The SmartMove project addresses key action on energy-efficient transport of the Intelligent Energy Europe programme (STEER). In line with the Transport White Paper it focuses on passenger transport and gives particular emphasis to the reduction of transport energy use.

1.2 The SmartMove project

The delivery of public transport (PT) services in rural areas is faced with tremendous challenges: On the one hand the demographic dynamics of ageing and shrinking societies have particular impacts on the PT revenues depending on the (decreasing) transport demand. On the other hand, PT stops density and the level of service frequency are often of insufficient quality. Thus, there is a need for the development of effective feeder systems to PT stops and for the adaptation of the scarce PT resources to user needs. For the SmartMove project, feeder systems are the different ways of linking a specific region with the back bone PT system, usually a bus or train network or a combination of both. This can be done by improving the walking and cycling facilities to and around the stations, by implementing flexible bus systems or by promoting car pooling or car sharing etc.. However, even if sufficient rural PT systems are available, large parts of the population face diverse subjective barriers to use PT. This is even more relevant for PT feeder systems: in many cases citizens are not even aware of their existence or, if they are aware of them, there exist subjective barriers to their use.

These problems are addressed within SmartMove by implementing “Active Mobility Consultancy” (AMC) campaigns for PT lines and their feeder systems in eight rural and peripheral areas. The objective of the AMC campaigns within the project aims at promoting the use of PT via personalised travel marketing approach. The word ‘active’ in the term “active mobility consultancy” has a twofold meaning. On the one hand, it refers to the active process of informing people on PT: it is not PT users, who have to inform themselves about PT services; rather the PT operators that have to inform their (current and potential) customers according to their individual needs. For this purpose, current and potential PT users are contacted to provide them with demand based information via different communication channels. The second meaning refers to several active measures aimed at decreasing subjective barriers such as overestimating prize and travel time whereas underestimating the supply and options to the use of rural PT systems.

The AMC campaigns are more than purely the provision of information: active measures will be offered in addition to the written information and the consultancy talks that are usually applied in similar campaigns. This might include actions like practical traveller training, citizen participation in planning or guided tours for PT feeder schemes. Additionally, information and feedback on user needs can be collected within the AMC campaign. This supports the adjustment of PT offers in line with users’ requirements.

The AMC concept used in SmartMove builds on existing approaches, which will be further developed through SmartMove based on the exchange of experience and mutual learning. In particular, we will develop existing AMC approaches along 4 lines:

- (i) the adaptation of the existing approach to recent developments,
- (ii) the consideration and inclusion of feeder systems into the AMC campaign,
- (iii) the development and application of a common monitoring and evaluation method and,
- (iv) the adaptation of the AMC concept to specific requirements of the implementing regions.

The result is an easy to use AMC concept that can be applied by PT operators all over Europe. The aim is to solve the specific, significant challenges of PT schemes in rural areas.

A main pillar of the concept is the extension of the AMC concept to PT feeder systems as they are crucial factors for rural PT systems. Better knowledge gained on this subject helps to improve public transport in rural areas. From a scientific point of view, the information attained about a feeder system based AMC campaign makes an important contribution to the further development of personalized travel marketing approaches. Even more important, by implementing a large range of dissemination activities, such as webinars and take-up seminars, not only the SmartMove partners, but also a broad range of stakeholders are informed about the manifold possibilities and advantages of an AMC campaign.

Eight rural and peripheral regions in Europe prepare, implement and evaluate a local Active Mobility Consultancy campaign. PT operators achieve insight into the demands of both actual PT users and those who do not currently use PT systems, by applying the AMC campaign. If the non-use of PT is caused by hard facts – e.g. the location of the PT stops or schedule organization – PT operators can adapt their services to the demand of potential users. This will increase opportunities to make PT systems attractive for new passengers. Each of the AMC campaigns to be conducted through SmartMove will be based on a shared methodological approach which will then be tuned in practice to the needs of the local specific situation. These include the specific target groups, the specific cultural barriers, barriers and enablers, the type of PT feeder system (a possibility to reach PT stops by individual or public means), the spatial aspect (e.g. compactness vs spread, topography and geography, environment), the socio political aspects at the appropriate decision making level, the administrative aspects, the economic aspect and the planning aspects. Within each region, we have defined targets of several hundreds of households will be contacted. As a result, we expect a substantial mode shift to public transport, which in turn will lead to a substantial increase on energy efficiency, a decrease of resources consumed and a reduction of the greenhouse gas emissions caused by road traffic.

1.3 Contents of this Deliverable

The aim of this Deliverable is to develop a guideline of an AMC campaign as a back bone ready to be implemented in the case study regions of the SmartMove project after region specific modifications. Together with the fact sheets on feeder systems (D3.1) and on active measures (D3.5) the concrete implementation plan in each case study region can be worked out in detail. This guideline includes both, a description of the common approach and the adaptations made within SmartMove (in particular concentrating on rural areas). Based on this Deliverable a brochure will be produced and published in different languages of the SmartMove consortium. AMC campaigns or similar approaches were applied already with proven success in different European countries. The literature study (D3.4) forms the basis for this guideline.

This guideline gives an impression on how the AMC campaigns could proceed and facilitates in particular the procedure of dialogue marketing, as this concept is a backbone of the AMC approach. On the basis of some examples the concrete implementation process will be shown, whereby these examples are originated thematically from the two big successful topics: mobility behaviour and energy savings. In the following at various positions the research project DIALOG (individual motivation towards a climate friendly use of energy in the subject area of transport and households 2012) and a pilot study for dialogue marketing in rural areas in Austria (AMC Waldviertel-Line 2011) will be referred.

2 Elements of active mobility consultancy (AMC)

2.1 Dialog Marketing

General Approach

AMC campaigns undertaken in SmartMove aim on a mode shift from journeys undertaken by car to other more sustainable modes. The core element of the approach is based on the dialogue marketing concept. Personal and individual contacts with a selected target group are used with the ambition to sensitise people not to choose cars for each trip but to use public transport or non-motorised modes (walking, cycling) if there is an adequate alternative. This avoids unnecessary traffic volumes and causes benefits for the society by protecting the environment against noise emissions and air pollution. Dialogue marketing is a well-known marketing concept which has been applied successfully in many other areas, like the energy sector, for example in order to reduce the consumption of energy in a household (standby- function of electrical devices, change of “power-hungry”- electrical devices etc.) or to create an incentive for energy-saving investments (new heating, thermal insulation etc.).

Dialogue marketing is a multi-step form of marketing, where nothing is directly sold to the target persons. It is characterised by an intensive and demand oriented communication process with actual and potential public transport users. In particular, it aims at removing existing deficits of information and shows alternatives to achieve behaviour changes. Thus, the target persons need to be selected carefully in order to address people with a high potential of mode shift possibilities. Once, individual persons are selected provide customised information is provided. This focused approach makes dialogue marketing more effective than many other marketing concepts (Link et al. 2013, Brög 2008). In the transport sector, this approach has been applied successfully in many European countries already, e.g. in Austria (Hössinger, Wurz 2011, Waldhör et al. 2009) in Germany (Ker 2003) or in the UK (Cairns et al. 2004).

Provision of customised information

There are many possibilities of offering information via a wide range of information channels. However, they often need to be accessed actively by (potential) users. But most people do not use the alternatives, even if it delivers benefits. They are not aware of changes, improvements or even existing services. The reasons for this are often deficits of information as well as subjective barriers. Scientific studies prove constantly, that a lot of information does not reach the target persons or that alternatives are often underestimated. Because of this, alternatives are not noticed as attractive. Dialogue marketing pursues the objective to solve the deficits of information and subjective barriers of utilization by addressing persons directly and showing them their personal benefits of alternatives. Therefore the dialogue marketing is much more suitable as other approaches: With classical marketing approaches deficits of information cannot be solved; Persons with subjective barriers of utilizations are only rarely accessible with general information campaigns.

The provision of customized information is the aim of dialogue marketing. The use of dialogue marketing makes only sense, when the field of application is known basically. Therefore the quality of knowledge is not decisive: For example the topic mobility in rural areas is appropriate for the use of dialogue marketing. Because of the rare appearance of

public transport in rural areas, in contrast to an urban environment, it can be assumed that there is a low knowledge about the possibility of using public transport, consequently a deficit of information:

- Where is the next stop?
- Which tickets of public transport are available?
- Which ticket is appropriate for my mobility needs?
- How long do I have access to public transport at the evenings and weekends?
- Where do I receive information about the time table?
- At which stop do I have to change public transport modes?

All these information are easy accessible, for example on the internet. However, not only the access to information is decisive for the use, it is rather a question of whether the persons are willing actively to get this information. Often people stick to their usual behaviour, if no essential changes happen in their life such as change of residence, work place, professional status, household size, etc. Dialogue marketing pursues the objective to solve the barriers of information by personal contact and showing personal benefits of custom-made alternatives. Compared with “classical” advertisement the aspects of transferring information and assistance towards people’s needs are in the foreground: dialogue marketing provides demanded information to target persons. Dialogue marketing aims to address people personally and towards their own individual needs only.

Effects to be achieved

With great effort in service activities and the use of a big variety of individual information provided the dialogue marketing can achieve significant results, i.e. dialogue marketing delivers measurable behaviour changes, which have a monetary value. For example, the research project DIALOG stated a shift towards other transport modes, while motorization decreased apparently (Table 1).

Table 1: Changes of mobility behaviour due to dialog marketing (DIALOG 2012)

	Transport means:	public transport	walking	car use
Behavioural change of the number of days of usage before and immediately after the dialogue marketing	+ 12.7%	+ 19.9%	-1.3%
	... before and one year after the dialogue marketing	+ 6.0%	+ 6.3%	- 2.0%

In a short time perspective the frequency of use of public transport and walking increase sharply, while the number of usage days of cars is decreasing. In a long term perspective the positive effects decline slightly, nevertheless a positive long term effect of dialogue

marketing is provable. This short term effect can be explained by a lot of additional trips initiated during the campaigns, e.g. partly supported by test tickets or try out pedelecs handed over to the target persons for a while. The impact of dialogue marketing also depends on the application area: For example, it is possible to attract a higher number of participants in areas with an adequate supply, considering the main public transport system, different types of feeder transport systems, e.g. local initiatives for shared taxis, existing renting systems or at least information platforms in the web to exchange and match mobility needs. By applying dialogue marketing soft effects can be achieved as well. Because of the personal address the participants feel better informed about alternatives to private car use and feel more responsible to change their behaviour. Dialogue marketing is accepted widely by the participants. The research project DIALOG (2012) proved that 82% of participants would take part again on dialogue marketing and would agree on a nation-wide implementation.

If the supply of alternative environmental friendly modes is adequate for a small minority only or to the group of persons with no access to a car, the effort and the resources invested in the campaign may be too much in comparison to the effects likely to be achieved. In such cases, mobility supply in the region needs to be reorganised and improved at first. For example, if the time table for public transport is reduced to a minimum of two links per day, the possibility to find persons with exactly this mobility needs is too small for an area wide campaign.

2.2 Active measures

As the name “active mobility consultancy” indicates, the AMC campaigns focus on both, a consultancy based on individual needs as described above as well as active measures, i.e. it is not just informing people on public transport. Active measures support the objective of dialogue marketing and can increase the willingness to participate as (i) this increase the variety of proposals to be offered to the target persons and (ii) will raise the awareness of the campaign as such activities might be published in local media already. The active measures are of high importance within the SmartMove project as the level of knowledge on PT services and PT feeder schemes in rural areas is supposed to be low, while personal barriers are high. Thus, AMC campaigns include interactive and participative elements to support the provision of individual information in order to decrease subjective barriers to the use of rural PT systems and its feeders. Citizens are encouraged to participate in several activities organised along the dialog marketing campaign. The aims of the accompanying active measures are

- to raise the awareness on the ongoing campaign in the region,
- to recruit participants for the AMC campaign,
- to offer a platform for an interactive process with the inhabitants of the region in order to improve the PT systems to the specific user’s needs and
- to achieve direct effects by convincing people due to the participations at the activities.

Active measures are addressed to a certain mode or to the general public initiating a participatory process (Table 2). A detailed description of each measure mentioned below can be found in Deliverable 3.5, “Fact sheets on active measures”.

Table 2: Overview on active measures

Non-motorized Measures	Public Transport Measures	General Measures
<ul style="list-style-type: none"> • Guided walking tour • Walking for health • Guided cycling tour • Providing try-out-Pedelecs 	<ul style="list-style-type: none"> • Promotion events for flexible public transport • PT try-out activities • Traveler training • Public transport training events for elderly people • Tailored PT advice with the help of existing information and communication technology (ICT) tools 	<ul style="list-style-type: none"> • Citizen audits • Workshops with citizens • Focus groups with citizens • Use of social media, use of smartphone apps • Travel games for active mobility • Mobile Guidebooks for the elderly • Personal mobility Assistants for the elderly people • Mobility assistants for elderly people at major transport interchanges • Info packages for new residents

The selection of active measures to be conducted and the timeline depends on the specific characteristics of the implementation area in terms of target group, PT services, PT feeder schemes, spatial characteristics etc.. For example, guided walking tours can be offered prior to the launch of the marketing campaign in order to raise the awareness of the intervention, but can be included in the marketing campaign as an add-on tool as well.

2.3 Evaluation

Evaluation of the AMC campaign is an important issue, as it shows the success of the measure and in particular the positive impact on the environment achieved. However, the main objective of the AMC campaign is the provision of the individual information for the inhabitants, thus, the evaluation procedure needs to be included in the course of the campaign.

Main objectives of evaluation process are

- to evaluate the implementation process of the AMC campaigns and
- to evaluate the impacts of the AMC campaigns on the basis of common and shared indicators, methods and tools,

Thus, the evaluation of the AMC campaigns can be distinguished into a process and an impact oriented approach. The process evaluation collects indicators about the performance of the AMC procedure. This includes the number of people contacted, the response rate, figures about the information requested etc. The impact evaluation quantifies the effects of the campaigns by measuring travel behaviour changes and calculating the energy saved or the reduction of GHG emissions etc. by reducing the number of car trips. The impact

evaluation is based on a comparison of mobility behaviour measured in surveys and passenger counting for the situation before and after the conduction of the AMC campaign.

“Before” Situation

Depending on the regional context of the implementing region and the data availability the evaluation of the existing situation can be determined by two approaches:

- (i) Asking the respondents about the socio-demographic profile as well as their individual travel behaviour in the first stage of the AMC-campaign. This is included in the telephone survey conducted in the segmentation phase. An example is given in item 3 in the “Guidelines for telephone calls” (see Annex on page 24).

and/or

- (ii) Counting PT passengers on the lines affected as well as on reference lines of the implementation area.

“After” Situation

The evaluation of the results of the AMC is using the same methodologies as the surveys of the “before” situation, i.e. (i) asking the respondents for their travel behaviour after AMC campaign by phone and/or (ii) counting PT passengers.

A detailed description of the evaluation concept will be documented in Deliverable 6.1, Instruction for local evaluation plans. This document will form the basis for the implementation plans for each implementation area.

3 Steps of the active mobility consultancy

Based on the concept of dialogue marketing the steps of the AMC campaigns undertaken in SmartMove can be segregated into 6 phases (AMC Waldviertel-Line (2011, Dialog 2012):

1	Preparation phase
2	General contact phase of target persons
3	Segmentation phase: Identifying the information needs
4	Individualised contact phase: Send the service form
5	Delivering phase: Hand over the service packages/ „thank you presents“
6	Consulting phase

3.1 Preparation phase

Definition of the objective and the target group of the campaign

In the first instance, it is important to define the objective of your marketing campaign, i.e. the AMC campaigns of the SmartMove project are focussing on PT systems in rural areas including its feeder systems. Thus, the backbones of the PT system of the region need to be identified as well as possible feeder systems and accompanying active measures are to be analysed. The decision which accompanying active measure should be implemented depends on time and financial resources. It has to be decided if a certain target group or every citizen is addressed. Concentrating on a certain target group (for example: elderly people, young people, students, people with changes in their place of residence, tourists) could be an advantage as the information materials and accompanying active measures can be adjusted to the needs of the target group.

Support of local stakeholders

The AMC campaign aims to contribute to environmental protection. Therefore, it is appropriate to ask for support concerning co-finances and conceptual involvement at diverse stakeholders. The project idea and details of the implementation area and the effected lines should be discussed with representative of the provincial and local government, public transport associations as well as PT operators and mobility managers. The aim is to agree on particular lines of interests and to achieve a common ownership on the implementation of the AMC campaign in a particular region. Depending on their field of work the support of stakeholders can be manifold, e.g. by providing information material or supporting the contact and delivering phase.

Development of a road map

The development of a road map includes a timeline, staff and budget plans. It is of great importance to define all tasks precisely. The personnel planning for the implementation of the campaign must be in line with the concrete objective:

- How many persons should be addressed? Some tasks are mostly independent of the number of participants, for example the development of a concept or the collection of information to be used in the campaign. Other tasks like printing material, sending of

material, answering of phone queries or individual consulting require more resources with every additional person to be included in the campaign.

- How the individualised contact and delivery phase is designed? By contacting the target persons by telephone, a higher participate rate can be reached and motivation to change behaviour might be increased. However, for this more resources are needed indeed. Moreover, it might cause some legal problems in some countries.
- If you want to offer personal consultation, you can manage this with your own staff, assuming that enough personnel capacities are available. Also the use of external providers is possible (e.g. a mobility agency), which has to be organized in advance.

Preparation of the sample size

In order to define the target group and the number of persons being addressed (also dependent on the financial resources available), lists are prepared with the addresses of the target persons. Contacts to the local government established could support the access to these data. Experiences show, that about one fourth of all households is not available as data may be outdated or wrong. In addition about one fourth – and even more– is not interested in participating dialogue marketing. On the basis of already implemented projects concerning dialogue marketing a measured value of success could be determined, e.g. if about 30% of all contacted persons reply and the further communication can be maintained, the campaign can be regarded as successful.

Collection of existing information material

Existing information material should be available in a sufficient number and includes materials of other information providers as well. If no information material is available, which suites to the topic of the AMC campaign, it has to be created for the campaign. In such a case, a professional and attractive design and layout has to be ensured. Sometimes, providers of information material are also providing giveaways which can be used as “thank you presents”. However, a sufficient number must be ensured, so that they are available during the whole campaign and can be delivered without any delay. The numbers of information material and of the “thank you presents” depend on the number of participants and the attractiveness of the information material. For calculating the required materials and the number of “thank you presents” one can use a rough formula based on empirical experiences. Approximately, a participation rate of 40% of all persons targeted in the campaign can be assumed, of which about each 2nd to 3rd participant orders information material, depending on the quality of the material. This means, if 1.000 target persons are contacted (gross), 150 to 200 editions of the information materials are usually needed.

Empirical formula for ordering Information materials and „thank you presents“:

Whole number of target persons contacted (gross),
 from these 40% are replying,
 from these up to 50% are ordering material,
 => Number of information materials and „thank you presents“, which should be available.

Thus, information materials and „thank you presents“ to be ordered is about 0.20 x number of target persons contacted (gross).

If budget is limited, the number of “thank you presents“ can be limited in order to reduce the project cost. Either by the regimentation that only one “thank you present” can be selected by each target person or by a first come first serve selection.

Preparation of the personal consulting phase

As already stated above, it need to be clarified if own staff organises the campaign or employees of an external provider need to be engage and who take over (part of) the costs. In the latter case, the provider has to be contacted at an early stage clarifying interfaces of the cooperation. However, possibly external assistances might need additional workplaces. Please note that for all telephone contacts sufficient quiet workplaces should be available. Working documents like a contact lists, contact forms, writing material, contact details of supervisors in case of problems etc. should always be at hand. All notes, which were made during the telephone contacts, should be integrated into a database immediately.

Staff training for all persons involved

To make sure that the AMC campaign is successful, all internal and external employees should be trained, in order to increase the quality of the contacts with the target persons. Coordination, training of employees and the allocation of competencies are indispensable. Only trained employees can solve deficits of information of target persons immediately. This is an important success factor to reach the objective of the campaign: the ad hoc provision of information and overcoming information deficits. All staff involved should know the overall road map, the objectives and the relevance of campaign by heart. The staff must be able to answer frequently asked questions. Conversations should be trained by role plays in advance. Moreover, the staff has to be trained how to establish contacts to the target persons as well. All employees should know the information required from the target persons (to proceed with the campaign) very well and can manage the database, when they type in the status of the contact.

Preparation of press releases and the involvement of local media

Local media and other multipliers have to be identified and contacts need to be established at an early stage. A press release should be published at the beginning and in parallel with the campaign in order to tell “stories of success”.

3.2 General contact phase

First contact by sending an information letter and a registration postcard

In the general contact phase the target persons are accessed by mail and all main information about the campaign is given. Although the response rate might increase by contacting target persons firstly by phone, it might cause legal problems in some countries, as people are contacted they have not asked for and the campaign is not related to market research only. For this reason, it is recommended at first to send an initial letter to inform about the campaign launched in the region. The main objectives and the process should be described shortly within one page at maximum. An invitation for participation has to be included as well. The initial letter could look like as shown below, translated from a practice example in Austria (AMC-Waldviertel Line 2011).

The willingness for participation is increased

- by using personal addresses and names and

- by the appearance of logos of regional personalities and institutions at the letter head. It shows the support from official sides.
- by including signatures of regional politicians, mayors of regional capitals or other important politicians (for example the politician responsible for environmental issues or transport issues).

A contact person should be named on the cover letter and a phone number and the time should be given, when this contact person is available for any questions. Phone calls beyond the time should be recorded and be answered later. The contact person need to be able to answer all questions concerning the objective and the process of the campaign and should have access to the database documenting the communication between the project team and the target persons.

On a separate postcard to be included in the initial letter, the target persons can express their willingness to participate. The effort to respond for the target persons need to be as low as possible. The postage should be paid by the addressee. By naming the phone number and sending the postcard, the target person agrees to the participation. The postcard should be printed and can look like the following illustration, translated from an Austrian practice example (Dialog 2012).



*An initiative of
The province of Niederösterreich
In cooperation with*

University Bodenkultur
Institute for Transport Studies
Peter-Jordan-Str. 82
1190 Vienna

E-Mail: waldviertellinie@boku.ac.at

Telephone: 01-466837-5300
Mo to Fr 10 to 16 hours

To
John Example
High street 24
3738 Oldnailsmountain

St. Pölten, May 2014

**Something is going on in the Waldviertel!
You can participate – and benefit!**

Dear John Example

In the Waldviertel region the public transport supply for a long time was based on pupils transport needs. Other client needs were not included in the planning and therefore did not show up in the buses. The province of Niederösterreich has decided to rethink this policy. Since December 2009 by using the label "Waldviertel Linie" a high quality express bus system was established, which links the bigger towns and villages of the region on regular and frequent basis. Modern buses are used to serve the lines. These buses offering the people of the Waldviertel region an interesting public transport supply including persons with no access to a car, commuters working in the area or abroad and need a hub to the major railway system.

The frequency of usage is strongly dependent on the awareness of this high qualitative public transport offer. Therefore the province of Niederösterreich initiated a campaign which will be carried out by the University of Bodenkultur. If you are interested, please reply the postcard included in this letter. If you asking for by ticking the box you will be personally contacted by a member of the service team within the next days and he will try to answer any questions with regard to the bus system or will collect your requests on information material we can offer for you. If you prefer no individual contact, but you are interested in information material, please send us the postcard as well and you will receive an order list to fill in your requests.

The information we can offer to you includes for example information how to buy ticket, which ticket is the best price for your individual needs, where is my next stop and how to get there, where and when you can get from there and a cost comparison between car and public transport on your personal trip route.

We hope, that we can convince you to take part in this campaign and you will consider to ride the Waldviertel Linie more often in the near future.

Kind regards

John Fast
Province of Niederösterreich
Head of department of Transport

Michael Goodwill
University Bodenkultur
Project manager

**Logo
of Wellville**

Project DIALOG
Climate protection within mobility and household energy

Dear citizens of Wellville!

The town of Wellville carries out a dialogue marketing campaign aiming at potential of energy consumption savings in the field of mobility and in your flat. We welcome your willingness to participate and ask you to send us contact details, so that we can include you in the further service activities.

The postage will be paid by the project! You need to fill in the back page only and return the postcard to us via surface mail.

All your contact details and further personal information will be treated confidentially considering the national privacy standards and will not be transferred to any third party.

We appreciate your participation!


 Jessica Moore
 Mayor of Wellville

<p><input type="checkbox"/> YES, I will participate in the dialogue marketing campaign for energy consumption savings.</p> <p>My Name: _____</p> <p>My Phone number: _____</p> <p>Do you have any questions? Please contact Lucy Sky by calling 0123/12345 - 12 daily from 9 to 10 hours at your disposal.</p>	<p>Postage paid by Receiver</p> <p>To Wellville Town office Lucy Sky Market square 1 1234 Wellville</p>
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Follow up phone calls

In the follow up phone call the target person can be motivated by mentioning the personal advantages. Information can be identified needed for the next steps of the campaign and information is collected in order to prepare the personal information materials and to carry out evaluation activities. A corresponding questionnaire for the phone call needs to be prepared. The questionnaire is an internal working sheet, where the contents are determined

in a certain structure and where answers can be noted. Consequently it is both an interview guide and a questionnaire. It contains:

- text passages, which has to be read by the interviewer within the phone call (e.g. Hello, my name is..., I am calling because of ... Do I speak with...?)
- boxes for answers to questions raised during the talk and
- just in case, instructions for the interviewer how to proceed within the talk with target person (“If target person answers the question with no, it goes ahead with question number xy”).

For each target person a separate questionnaire is needed. The specific address and the name of the target person, the date of contact and all given answers are noted on the questionnaire and entered in the communication database afterwards. It is recommended to prepare a computer-based input mask, which includes all further tasks. The questionnaire could look like as illustrated in the Annex (see chapter 6). It is based on a practice example made for the objective to support public transport in Austria (AMC-Waldviertel Line 2011). The answers of the target person and all information concerning the participant are documented in the communication database. This includes information towards the address, the status of this person with regard to the next steps of the campaign as well as further information to be used for evaluation. The information of the status concerns the participation of the target person, which can be e.g. “not interested, excluded”, “interested, need to be contacted”, “information to be sent”, “information sent, process accomplished”. This means, it includes information, whether the participant takes part or not and when the last date of contact to the person was (see item 5 of the Annex). Several further information need to be documented, which has been collected during the calls. This could be, for example, how the current mobility behaviour looks like or which information materials they should or have received already.

3.3 Segmentation phase

Identification of respondent groups

Based on the identified data within the mail contact and the telephone contact, the respondents are divided into four groups:

#	Respondent group	Action to be undertaken
1	Persons not interested at all, no communication established	They will be excluded from any next steps.
2	Public transport users with no further information needs	They will receive a “thank you present” and a letter to support and to encouragement them in their behaviour.
3	Public transport users with further information needs	They will take part on the further steps of the AMC campaign and will receive a “thank you present” and a letter of support.
4	Non Public transport users with further information needs	They will take part on the further steps of the AMC campaign.

The idea to send persons, who are using public transport already, a “thank you present” and a motivation letter, is to encourage them in their current mobility behaviour. Furthermore, sometimes these persons either see their behaviour as nothing very special or they suffer on the fact their sometimes altruistic behaviour is not recognized at all by the society. The person can chose one “thank you present” out of a list with several opportunities. Ideally, the „thank you presents“ should be specific for the topic and useful. For example mobility related presents can be

- city maps,
- pocket lights,
- pocket umbrellas,
- a reduction on trips with public transport or free test tickets or
- a reduction on or a free bike rental (e.g. electric bikes).

3.4 Individualised contact phase

Distribution of service forms

Persons who need information receive a service form by surface mail. In this form, several information materials concerning the topic are listed to be selected by the target person. The participants can choose all information materials on this form they are interested in. The information material consists of

- existing information material and
- tailor-made information according to the individual person´s needs (which are specified by the respondent on the service form).

In order to save costs it is recommended to use existing information material as much as possible, e.g. material of other information providers or companies: Are there any relevant materials of regional or national institution on this topic available? Which complement materials can also be relevant for the target group? The focus should be widely and open. Information about walking and cycling can be expanded over the element of feeder transport to the public transport stop. The following illustration shows the front page of a service form with an offer of existing brochures and leaflets used in the Waldviertel pilot study in Austria (AMC-Waldviertel Line 2011):

free weekly test ticket

You can have test rides on all lines .
As long as stocks last !

Please choose one of the presents offered below as a

thank you for your participation!

please put in the number „1“ in your favourite present and chose another items, where you put „2“

Ihre Wahl



pocket umbrella



pocket light



travel set



insulated mug

To which address the material should be delivered ?

same address as this form was sent

following address:



NAME:

ADDRESS:

Service action for

WALDVIERTEL-LINIE



EINSTEIGEN. UMSTEIGEN.

Something is going on in the Waldviertel
You can participate – and benefit!

Please tick the box of your required items!
An envelope for your answer is included (p ostage paid)!



an initiative by



Regional pocket timetable ○
all lines and courses of the region

Gmünd Zwettl Gföhl Horn Waidhofen Pöggstall

Time table for a specific Waldviertel-line ○
please select your preferred line

WA 1 Gmünd – Zwettl – Krems/Donau and vice versa including connected lines to and from Vienna and Horn

WA 23 Horn - Rastenfled and vice versa including connected lines to and from Zwettl and Waidhofen/Thaya

Public transport map of the Waldviertel Region ○
all trains and buses included

Public transport stop ○
information of all departures and arrivals at your desired stop

Please fill in an address and we will send to you the information for the closest stop or fill in a concrete name of a public transport stop :

1

2

3

4

qando - free time table information ○
for your smart phone a guideline how to install and use

Leaflet „Mobility agency Waldviertel” ○
An overview of services provided and contact details

Ticket- und fare information ○

Where to buy? Which type of tickets? Fare structure examples

On your request we compare your individual cost for a typical way for you (Comparison of cost between car and public transport) :

from to
village village

one way Frequency: times per week

both directions per month

car type Diesel

Gasoline

Leisure activities ○

Out door activities Waldviertel
hiking paths , excursions with your bicycle, etc.

Travelling to the neighbours (Czeck Republic)
public transport supply Waldviertel - Southern Bohemia

Individual time table ○
a time table for your desired route

Monday - Friday Saturday Sundays / Bank holidays

from:
(public transport stop or address)

to:
(public transport stop or address)

Outbound: hours Inbound: hours

Pages 2 and 3

Preparation of personal information based on the requested information

Personal information material describes the individual advantages of behaviour change for the target person. For this, some information of the target person is needed to be able to provide such service. This needs to be considered in the service form. Some examples for personal information materials concerning are:

- Individualised time tables: Time tables of all lines, which stop nearby the desired address. Eventually including a description, how to access the stop (e.g. route information for walking including average walking time).
- Individualised travel plans: If information in detail about desired trips (origin, destination and desired departure or arrival time) is reported by the target person, public transport information for this trip can be provided.
- Comparative calculations: Compare the consequences of using public transport instead of using the car. Comparative categories could be the effects on environment (CO₂-emissions), travel cost and/or travel time. Calculation can be based on single trips or better on the annual basis (as usually a higher frequency of usage reduces the cost for public transport because of the option to calculate based on a season ticket).
- Information about additional active measures organised in the region, e.g. pedelec-try-out days (including the possibility of registration)

Personal information materials have two advantages in comparison to general advertisement materials:

- Many persons do not trust general example calculations. Calculations based on individual framework conditions including the description of personal advantages have much more power of persuasion.
- By showing interests towards the specific personal situation, it is indicated that the individual needs of the target person is important. Thereby you can motivate people more effectively to behavioural changes.

In addition to the general and the personal information materials to be selected, an appointment for consulting can be offered on the service form. A little „thank you present“ can be an incentive for taking part and returning the service form. The service form is returned by the target person, but the postage should be paid by the addressee.

If there is no answer within three weeks, a reminder-call should be made. It is important, that all information materials should be adjusted on the target groups' needs. Changes in travel behaviour can only be achieved by providing information material, which is informative, short and precisely. Empirical values show, that the design of information materials is very important. The professional design and the high quality of information materials are indeed very expensive, but guarantees success.

After receiving the service forms containing the “orders”, the individualised service package for each participant need to be prepared. They usually include:

- general information materials,
- individualised information,

- an appointment for consultancy if requested (and offered within the campaign) and
- the “thank you present” selected by the target person.

3.5 Delivering phase

The service package with the requested information materials is handed over to the target persons. A personal (face-to-face) handing over is recommended, in order to strengthen the relation with the target persons. Additionally, it is possible to talk about the personal information materials delivered. If a personal handing over is not possible, it can be send by surface mail, but experience shows, the effect of the campaign is smaller.

3.6 Consulting phase

If a personal consultancy is offered on the service form, it should be carried out as soon as possible. It is important, that well-informed employees carry out this consulting. In many areas, professional consultants for these issues are available, as mobility agencies, public transport operators or other (public) institutions are commissioned already to carry out such activities anyway. It is important to find a form of cooperation with such institutions for this phase. In some cases, these institutions can take over this task and the request by the target persons just need to be transferred. During the personal consultancy a further present should be given to the participants. This has been proven as being efficient.

3.7 Evaluation phases

In order to quantify the success of the AMC campaign, an evaluation should be included in the process of the AMC campaign, although it is not absolutely necessary and work-intensive and often imprecise. The evaluation concept undertaken in SmartMove consists of a three stages: (i) Statistical figures of the process of the campaign are collected at each stage described above, e.g. how many people have been contacted, what is the response rate, which materials are ordered etc., (ii) socio-demographic data and data about the current mobility behaviour are collected during the telephone survey, arguing that this information is need for the preparation of individualised information packages, e.g. do you know the next PT station, how often are you using PT in your region etc., (iii) data of behaviour changes are collected a few month after finalising the campaign. People are contacted by phone and are asked questions about the influence of the campaign on their individual mobility behaviour. In parallel passenger counts could be organised (before and after the intervention) in order to gain figure for plausibility checks.

4 Summary

The approach of dialogue marketing as part of the active mobility consulting (AMC) campaign consists of several steps:

- (1) Preparation Phase: This phase includes the definition of objectives, selection of the target groups, a strategy how to access them, find external cooperation and support, develop a road map for implementation, collect or produce general information material, collect information to create individualised information and train the staff.
- (2) General contact phase: Target persons are contacted by mail. An information letter explains the objectives of the AMC-campaign and asks for their participation.
- (3) Segmentation phase: People are segmented into several classes by both, their current use of the public transport, and their willingness to participate in the AMC-campaign.
- (4) Individualised contact phase. Regular public transport users are encouraged in their behaviour by a little thank-you present. An order form of available information material is send to all participating target persons who have stated need for information. They can select those information materials they are interested in. Additionally, they can specify if they have a need for personal consulting (if included in the campaign).
- (5) Information phase: The requested information is handed over by a representative of the campaign. This usually includes individualised public transport timetables, and comparisons of both, travel costs and CO₂-emissions if different modes are used for trips reported by the respondent within the contact phase. This information clearly should illustrate the advantages of public transport schemes from a personal point of view, at least for regular trips made, as season tickets can be used.
- (6) Consulting phase: If requested, a personal consultancy is conducted.
- (7) Evaluation phase: In order to keep the burden of the respondents low, the evaluation is embedded in the process of the different steps of the campaign. However, a more detailed “after” survey is organised a few month after finalising the campaign.

Together with the implementation of active measures these steps form the backbone of the SmartMove AMC campaign. However, it usually needs to be adapted due to the specific framework conditions of the particular regions, when the implementation is designed.

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6 Annex

Guideline for telephone calls

1. Welcome

Hello, my name is calling from the Institute for Transport Studies, University Bodenkultur Vienna.

Do I speak with?

On behalf of the province of Lower Austria we carry out the dialogue marketing campaign in the region you are living in. Thank you for having replied on our letter we have sent to you.

2. Introduction

First of all I would like to ask you if you have general questions with regard to the campaign.

⇒ In any case, please fill in regarding box „general questions“ with some key words

⇒ If this will be explained later on within the phone call, please refer to this

⇒ If the question refers to individual mobility, please state

Thank you for this question, , currently I am not able to answer this immediately but there is an option on individual mobility consulting during the process of the campaign, where you can discuss this issue with an local transport expert.

⇒ If the question belongs to other issues, please try to answer

⇒ If you cannot answer the questions, please state:

Thank you for this question, currently I am not able to answer this immediately, but we will come back to you as soon as I collected a correct answer.

⇒ If you it is more a comment or positive/critical statement :

Thank you for this remark, I will make notes on this and will transfer this information to the project leader.

To be able to kick of the process, I need to ask you some questions in advance about your interest in mobility. It does not take more than 3 minutes

⇒ If person refuses, please state.

We need to explore this information to understand for example, if you are a non-user or user of the public transport service and some information may be obsolete therefore.

⇒ If person still refuses, please state.

Ok, we accept your position, as a next step we will send to you an order list, where you may select information material. We appreciate, if you return this list to us and we will deliver all information ordered as soon as possible

⇒ If person agrees, Code "Interview carried out" and proceed with 3. Segmentation

3. Segmentation

How many persons do live in your household permanently, including yourself?

⇒ In principle the interviewee decides, who is permanently living in his household if he feels so. Possible unclear situations can be: students or long distance commuters with two households, children of a split family etc. You can answer questions referring to this like:

As a thumb rule we define to include persons as household members, if this household is the one the person is spending the most time in comparison to other households.

⇒ Please document answer in referring box

Please tell me for all this household members aged above 14 years, how often they use public transport? Classified after "daily basis, more than on time per week, more than on time per month, less than this, never. Please start with the oldest person and tell us his name and gender as well.

⇒ Please document answer in referring box

Please tell me which household members aged above 14 years, owns a weekly ticket, a monthly ticket, a one year season ticket. Please start again with the oldest person.

⇒ Please document answer in referring box

Are you aware of the regional bus system „Waldviertel Line“ in your region?

⇒ If not please state:

This is an express bus system financed by the province of Niederösterreich and is operating since one and a half year. The buses are linking the bigger towns and villages of the region on regular and frequent basis.

⇒ Please document answer in referring box

Are you aware of the unique branding of the buses? Can you explain it some key words?

⇒ If not please state:

The buses are lettered with WA and the corresponding course number. The buses are coloured in silver-grey. On the front there is a sign in yellow and blue with the word "Waldviertel Line"

⇒ Please document answer in referring box (yes, yes-but doubts, no)

Persons to be asked, only those who are using public transport

Do you know which household members are using the Waldviertel Line buses?

⇒ Please document answer in referring box

Persons to be asked, only those who are not using public transport.

Which are the main reasons for you (and for other household members) not to use the Waldviertel Line?

⇒ Please document answer in referring box

How many cars possess your household?

⇒ If more cars than licence plates, the number of licence plates is relevant

⇒ Please document answer in referring box

Persons to be asked, only those who are using public transport

As final question I will read some options to further improve the Waldviertel Line service. Please tell me, if this would be an improvement which may attract you (and other household members) to use more often the Waldviertel Line in the future? Answer categories are: No, likely not, likely yes, yes.

⇒ Please document answer in referring box

Persons to be asked, only those who are not using public transport

As final question I will read some options to further improve the Waldviertel Line service. Please tell me, if this would be an improvement which may attract you (and other household members) to use the Waldviertel Line in the future? Answer categories are: No, likely not, likely yes, yes.

⇒ Please document answer in referring box

4. Further procedure

Thank you for your answers. It is important to know, how the Waldviertel Line is known and used in the region as this service is principally designed for the residents of the Waldviertel. To further increase the awareness, we will send to you an order list by surface mail. You can select all items from the list, we can offer to you. The list can be replied in an envelope, postage will be paid for you of course. If you participate, additionally we will send to you a small thank-you present, you can select on the list as well.

⇒ To be added, if user regularly uses the bus already

We understand you are already a regular user of the Waldviertel Line! First of all, we would like to say thank you for using this service. You are contributing to a better and sustainable world by doing so, even if it seems to be a self-evident thing for you personally. In case there is no need to receive further information we offer in our order list, as a small thank you for using the Waldviertel Line, you can select one of the small „thank you presents“ from our list.

⇒ If person ask for the kind of information or thank-you present, please introduce the order list

Thank you once more for the nice talk and the willingness to participate to the campaign! You will receive the order list in the coming days. Good bye.

5. Coding rules

Status	Description
No contact initiated	No interview could be made with these households, e.g. no communication possible so far, a further date was agreed on. These households are not completed in this stage of the process.
In process	
Phone/Number incorrect	These cases are completed for the whole process.
No contact, but 7 contact attempts made	
Communication problems (language skills, mentally, disabled)	
Is not part of the target group (e.g. not the main place of residence)	
Postcard received, but actively refused to participate	
No postcard received	
Interview made, segmentation done	