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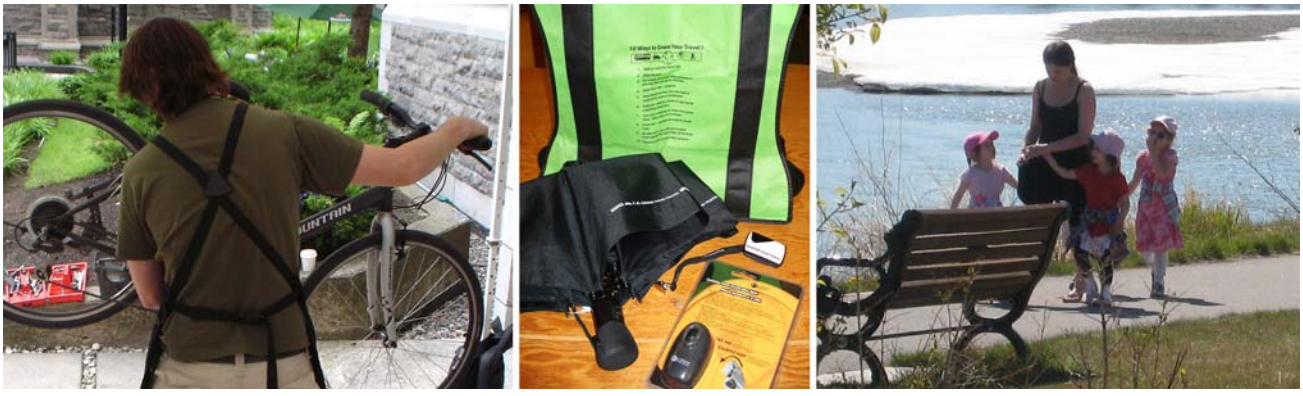
Changing Transportation Behaviours



A Social Marketing Planning Guide

November 2010

Canada

AUTHORS

» Jay Kassirer MBA CMRP Social marketing consultant, trainer and web-publisher

» François Lagarde MA Social marketing consultant, trainer and adjunct professor (University of Montreal)

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Jay Kassirer
kassirer@cullbridge.com
(613) 224-3800

REVIEWERS

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» Claude d'Anjou, Executive Director, Mobiligo

» Sameer Deshpande, Associate Professor of Marketing, Faculty of Management and Center for Socially Responsible Marketing, University of Lethbridge

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» Jim Mintz, Director, Centre of Excellence for Public Sector Marketing

» Philippe Morin, communication agent, Voyagez Futé

» Jenyfer Neumann, TDM Coordinator, City of New Westminster

» Judy Yack, TDM Coordinator, Public Works Planning, Transportation, Region of Peel

How to use this Guide

Is this guide for you?

If you want to influence transportation choices, this guide is written for you.

Perhaps you are a TRANSPORTATION PLANNER or TDM SPECIALIST, a PROGRAM MANAGER tasked with changing travel behaviours, or an INTERESTED CITIZEN. You may be working on a very small or large program. This guide has been designed to help you focus on practical first steps and explore additional social marketing considerations.

What's inside?

The guide breaks planning into eight steps, one chapter per step. The **Dashboard Overview** provides a one-page summary of all eight planning steps.

1. **Form a Planning Team** looks at rallying colleagues (staff, volunteers, consultants) to benefit from their expertise, experience, networks and future support.

2. **Determine the Focus**, **Behaviours and Audiences** helps you concentrate your efforts where they will produce the greatest impact.

3. **Gather Information** discusses the types of information you'll want to find, in order to identify and prioritize the audience segments, benefits and barriers on which to focus.

4. **Set Objectives** provides a framework for developing realistic and measurable targets.

5. **Develop the Strategy** looks at how to methodically overcome key barriers and make particular travel behaviours more fun, easy and popular.

6. **Establish Partnerships** discusses partnering with organizations that share the same interests and goals, to reduce barriers, increase benefits, improve the credibility of your messages, and facilitate access to your audiences.

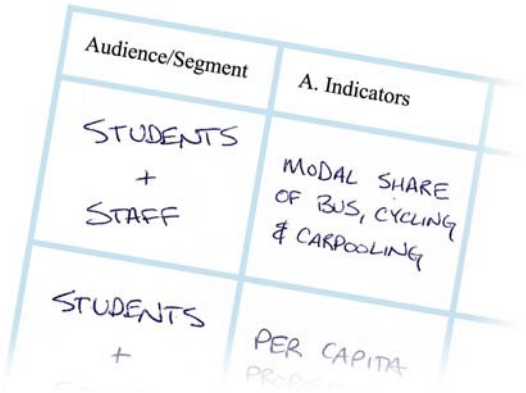
7. **Pre-Test and Pilot Test** describes ways to keep checking with reality as you develop your program, to ensure it will work and improve its cost-effectiveness.

8. **Implement and Improve Continuously** looks at how to ensure your program stays on track, evaluate impact and lessons learned, and increase cost-effectiveness over time.

Piece Together Your Social Marketing Plan contains blank planning worksheets for your convenience.

The **Resources** chapter at the back of the guide recommends both online and print sources for further information on each step.

Worksheets



Filling in the blank worksheet(s) associated with a planning step is one of the easiest and fastest ways to work through that step, record your insights and conclusions, and share them with others.

The guide's worksheets walk you through each step, provide quick access to the key questions to ask, and link to associated recommendations for further details.

Five Canadian transportation case studies are used throughout this guide to illustrate the social marketing planning process. At each step, you'll find sample worksheets, filled out with information from one or more of the case studies. You'll also find quotes from their managers, describing their experiences with each step and the outcomes achieved.

Using this guide

You don't have to follow every word or chapter in this guide to start benefiting from it. For example:

- Use the "In Short" sections as checklists for following the community-based social marketing approach.
- Draw on the worksheet questions and accompanying recommendations, when facilitating meetings or prompting your colleagues on key planning issues.
- Use sections of the guide to assess or improve elements of your current initiatives.
- Integrate some of the chapters or worksheets into your organization's planning processes.

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Glossary

Community-based social marketing (CBSM) is a form of social marketing that emphasizes direct contact among community members and the systematic removal of structural and other barriers to action (like unsafe pathways or a lack of shower facilities). CBSM also uses a set of "tools" (like prompts or obtaining a commitment) which have been identified as particularly effective in bringing about change; while each of these tools can promote changes in travel behaviours on its own under the right conditions, they are most effective when used together.[1]

Communication channels are the various media through which messages are transmitted to their intended audiences (see a list of these in the Appendix).

Marketing mix consists of the four Ps of Marketing: "getting the right *product*, at the right time, at the right *place*, with the right *price* and presented in the right way (*promotion*) that succeeds in satisfying buyer needs." [2]

A. *Product* means:

- the travel behaviour you are promoting to your audience – for example, cycling to work or school (*what you want them to do)* – this is what you're *selling*[3]
- tangible products or services offered to support this behaviour change – for example tire pressure gauges, showers at work, traffic safety courses or bike repair clinics (*how you'll help them do it*); and
- the benefits the audience will experience as a result – for example, time and cost savings, pleasure and fitness (*what they want from doing it*) – this is what they're *buying.*

B. *Price* refers to monetary and non-monetary costs that the target adopters have to bear and the barriers they have to overcome – for example, increased trip time, inconvenience, and safety concerns.

C. *Place* refers to the locations and environments where your audiences will learn more about, try out and/or continue doing the travel behaviour. Are these places convenient, safe and pleasant?

D. *Promotion* ensures that your audiences know what you are offering them, believe they will experience the stated benefits and are inspired to act.

Segmentation is the process of dividing a mixed (heterogeneous) audience into smaller groups consisting of more similar (homogeneous) individuals, based on how they would likely respond to a particular marketing mix.[4] You might, for example, choose to focus a walking program on those living within a kilometre of their schools, workplaces or nearest transit station. You might then further segment these people by age, or into those who are interested in walking more and those who are not.

Social marketing is "a process that applies marketing principles and techniques to create, communicate, and deliver value in order to influence target audience behaviours that benefit society (public health, safety, the

[1] McKenzie-Mohr, D. http://www.toolsofchange.com/en/programs/community-based-social-marketing/

[2] Cannon, T. (1992). *Basic marketing: Principles and practice* (3rd ed.). London: Cassell.

[3] In many cases you won't be *selling* anything for money and your participants won't be *buying* with money. However, the concepts of buying and selling can still be helpful in distinguishing what your participants are attracted to (why they will participate) vs what you are promoting (why you are running your program).

[4] Adapted from Maibach (2002), Kotler & Lee (2008) and Myers (1996). See the Resources chapter, in the section for chapter three.

environment, and communities) as well as the target audience."[5] It involves designing the walking / cycling / carpooling (etc.) experience so that it is truly attractive to your audiences and meets their needs. This requires the whole process of analyzing your audiences and context, and addressing all components of the marketing mix, *not* just the promotion component or simply an advertising campaign.

Social media is a group of Internet-based applications (like Facebook and Twitter) that allow the creation and exchange of user-generated content.[6] This is different from social marketing, although you will find some people confusing the two. The term social marketing was in use long before the emergence of social media. Social marketing involves designing a broad strategic framework, in which social media are a group of communication channels among many alternatives.

Transportation Demand Management (TDM) is a wide range of policies, programs, services and products that influence how (mode), why (purpose), when (time), whether (substitutes), and where (destination) people travel to make travel behaviours more sustainable. The main types of TDM measures are education, promotion and outreach, and travel incentives and disincentives. These are complemented by sustainable travel options and supportive land use practices.[7]

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[5] Kotler, P., Lee, N. & Rothschild, M. in Kotler, P. & Lee, N.R. (2008). *Social marketing: Influencing behaviors for good* (p.7). Sage.

[6] Kaplan, A.M. & Haenlein, M. (2010). Users of the world, unite! The challenges and opportunities of Social Media. *Business Horizons, 53*, 59-68.

[7] Transport Canada. *TDM definition, overview and rationale.* Retrieved January 6, 2010 from http://www.tc.gc.ca/programs/environment/utsp/tdmintro.htm#what_is_tdm.

Introduction

How effective is social marketing at influencing travel choices?

This guide is written to help you influence transportation choices, like cycling, walking or rollerblading to work or school, teleworking, switching trips to off-peak hours, and using public transit and car-pooling. We use a community-based social marketing approach, because it is proven, methodical, evidence-based and pragmatic.

Social marketing has developed a strong track record worldwide for its effectiveness at influencing a wide range of behaviours for both personal and public good. In Canada, the USA, Europe and Australia, for example, dozens of communities have decreased the modal share of participant[8] car trips by 8% to 15% and overall vehicle kilometres travelled (VKT) by up to 5%, and have significantly increased walking, cycling and transit use, by following most or all of the social marketing planning steps and principles outlined in this guide.[9]

Community-based social marketing

The term *community-based social marketing* (CBSM) was coined by Dr. Doug McKenzie-Mohr[10]. CBSM is a form of social marketing that emphasizes direct contact among community members and the systematic removal of structural and other barriers to action, since research suggests that these approaches are often most likely to bring about behavioural change.

CBSM also uses a set of "tools" which have been identified as particularly effective in bringing about change. While each of these tools can promote healthy and/or sustainable behaviour on its own under the right conditions, the tools are most effective when used together. These tools include, for example, norm appeals, obtaining a commitment, prompts, and feedback and recognition.

The five critical elements of CBSM are:

Selecting the travel options and behaviours on which you will focus (chapter two in this guide)

Identifying the related barriers and benefits (chapter three)

Developing and piloting a program to overcome these barriers and to promote these benefits (chapters four to seven)

Implementing the program across a community (chapter eight)

Monitoring, evaluating and improving the effectiveness of the program on an ongoing basis (chapter eight)

Beyond information, communication and promotion

For decades, practitioners in the health, environment and community-based fields have explored ways to persuade

[8] This is the change in the percentage of all trips made by each mode of transport, by participants in the programs only (i.e. not for entire communities).

[9] Based on data from:

- Möser, G. & Bamberg, S. (2008). The effectiveness of soft transport policy measures: A critical assessment and meta-analysis of empirical evidence. *Journal of Environmental Psychology, 28*, 10-26
- Tools of Change case studies and case study webinars (www.toolsofchange.com, www.webinars.cullbridge.com)
- UKERC's Technology and Policy Assessment team (2009). www.ukerc.ac.uk/Downloads/PDF/09/0904TransAwarenessMktg.pdf

[10] Mckenzie-Mohr, Doug (1997). *Promoting a Sustainable Future: An Introduction to Community-Based Social Marketing.* National Round Table on the Environment and the Economy.

individuals to adopt a range of behaviours.[11] In the process, we have learned that information *alone* is usually unlikely to change behaviours. As shown in the diagram below, you can get some people to change their behaviour just by providing information ("tell me / show me"), but only if barriers to doing the action are relatively low, there's some personal motivation to do the action, and the audience is simply unaware of the action and its benefits. For example, when a new cycling trail is built, it may only take getting the word out for people to start using it.

Much more often, however, people face real barriers to changing their travel behaviours. For example, a lack of shower and change facilities or a fear of bicycle theft at work may make it impractical for some to cycle there, even with a new path. For others, the main concern may be personal safety or inclement weather. While such barriers may be shared by certain groups of people, other barriers are as individual as fingerprints. Further, many people enjoy the flexibility and comfort of their cars. And everyone is influenced by family members, neighbours and colleagues. More often than not, these barriers and influences outweigh the good intentions of those who might otherwise change their travel habits. That's when the "help me" approach becomes necessary.

The only way to find out about and overcome these influences and successfully engage these additional people is to learn more about them and what's competing with our calls to action. We need to ensure that attractive alternative and competitive sustainable transportation choices *exist*, that individuals are *aware* of and *want* to use them, and that key barriers to doing so have been reduced.

Social marketing is a systematic approach for doing this. In other words, it helps us research, design and then promote travel choices so that they are attractive, competitive, easy and popular.[13] It uses a wide range of strategies, including policy measures, to affect the relative attractiveness and cost of each option. Community-based social marketing in particular stresses overcoming structural and other barriers. In practice, this means creating better walking and cycling networks, and improving transit services, as well as engaging people to optimize their personal travel decisions.

All this may seem daunting at first. However, it is more a matter of being systematic than allocating vast quantities of resources or time. In fact, whether an organization has extensive resources or operates on a shoestring, it is always wise to ask hard questions and gather solid information on which to base strategic decisions before spending (limited) resources. Taking more upfront planning time usually pays off in the end by reducing implementation time and costs and producing better results. This is why social marketing is gaining momentum with a growing constituency of professionals at all levels, many of whom are operating with small budgets.[14]

THE PLACE OF SOCIAL MARKETING IN THE CONTINUUM OF BEHAVIOUR CHANGE INTERVENTIONS[12]

Intervention approach	Information: **"Tell me / show me"**	Social marketing: **"Help me"**	Law: **"Make me"**
Context for intervention	Barriers are low Personal motivation exists Audience is unaware	Some barriers exist Personal motivation exists	Barriers are high Behaviours are entrenched

[11] Kotler, P. & Lee, N.R. (2008). *Social marketing: Influencing behaviours for good.* Sage.

[12] Adapted from: Rothschild, M. L. (1999). Carrots, sticks and promises: A conceptual framework for the management of public health and social issue behaviors. *Journal of Marketing, 63*, 24-37.

[13] Adapted from William A. Smith: *Make it fun, easy and popular* – Source: Smith, W.A. (1999). Marketing with no budget. *Social Marketing Quarterly, 5*(2), 6-11.

[14] Deshpande, S., & Lagarde, F. (2008). International survey on advanced-level social marketing training events. *Social Marketing Quarterly, 14*(2), 50-66.

Case Study Examples

This chapter introduces the five Canadian case studies that are used throughout this guide to illustrate each step of the social marketing planning process. The programs come from a range of settings – including school, workplace, small town and large city.

#1: Carrefour Financier Solidaire's (CFS) Employee Program is a great model for small businesses. Since the fall of 2007, Montréal's *Carrefour Financier Solidaire* (CFS) has been rewarding employees for choosing more environmentally friendly ways of getting to work, while at the same time making it easier to do so. The CFS consists of eight social and economic development institutions with 130 employees in 2009. Fondaction, the largest of these, had 78 employees at that time. At Fondaction, in the first two years of the program, the modal share for single occupant vehicles decreased by 15%, from 72% of all trips to 57% of all trips; transit and carpool use increased correspondingly. The number of individuals commuting by active transportation has tripled in summer time.

http://ethipedia.net/len/node/1176

#2: Green Communities Canada's (GCC) Active & Safe Routes to School program is used as an example in all of the planning-step chapters in this guide, to help build continuity between chapters. It is a comprehensive community-based program that taps into the increasingly urgent demand for safe, walkable neighbourhoods. The program promotes the use of active and efficient transportation for the daily trip to school, addressing health and traffic safety issues while taking action on air pollution and climate change. National-level activities, conducted by Green Communities Canada (GCC), provide resources, tools, information and links for schools and communities to create their own unique Active & Safe Routes to School programs. This case study will focus on the introduction of the program's *School Travel Planning initiative*, with viewpoints from the national, provincial, municipal and school levels. The school is **Glenayre Elementary**, located in Port Moody, British Columbia, with 395 students from kindergarten to grade five.

www.saferoutestoschool.ca/

www.sd43.bc.ca/elementary/glenayre/

#3: University of Victoria's Travel Choices TDM program serves a total population of 23,500 (19,000 students, 4,500 employees). It offers a range of initiatives that encourage a shift to using transportation other than the single-occupant vehicle (SOV). The objective is to ultimately decrease the number of vehicle trips to the campus and reduce both traffic and the amount of land resources required to accommodate parking associated with growth.

http://web.uvic.ca/sustainability/TransportationTravelChoices.htm

http://web.uvic.ca/security/parking/index.html

http://www.tc.gc.ca/eng/programs/environment-utsp-casestudy-cs66e-tdm-808.htm

#4: Whitehorse Moves, launched in 2004, was one of the eight community-based programs funded by Transport Canada's Urban Transportation Showcase Program to demonstrate ways of reducing greenhouse gases emitted from transportation activities. The City of Whitehorse is a modern, northern community with a population of approximately 26,000 people. The program resulted in a 10% increase in the number of households that had at least one member of the household walk or cycle downtown. In addition, downtown commuters increased their frequency of cycling and walking (between April and October).

http://www.tc.gc.ca/eng/programs/environment-utsp-whitehorse_final-803.htm

#5: Winnipeg's WinSmart Showcase, launched in November 2006, was another of eight community-based programs funded by Transport Canada's Urban Transportation Showcase Program. It included a range of measures including the construction of a new active transportation path, the introduction of real-time electronic bus departure information, and a new park and ride facility. Also included was a **Community-Based Travel Marketing pilot** that contacted 2,200 households using the individualized marketing model. These measures were remarkably successful in bringing about modal shifts despite Winnipeg's harsh winter weather and entrenched car-culture.
http://www.tc.gc.ca/eng/programs/environment-utsp-winnipeg-804.htm

Dashboard Overview

1) **Form a Planning Team**
   - » Form a knowledgeable and influential planning team.
   - » Establish an efficient schedule for the planning process, balancing the time needed to carry out the steps properly while maintaining good momentum.
2) **Determine Focus, Behaviours and Audiences**
   - » Determine the unique focus, transportation behaviours, and key audiences for your initiative based on solid information.
   - » Make the rationale and focus of your initiative very clear.
   - » Be as specific as possible in terms of the modal changes / changes in transportation behaviours that your primary audience would adopt if you are successful, and the measures that secondary audiences (e.g., decision-makers and influencers) could adopt to influence or support your primary audience.
3) **Gather Information (Formative Research)**
   - » Identify, learn about, and segment your key audiences based on existing and new research.
   - » Prioritize and choose the segments, barriers and benefits on which to focus.
   - » Identify opportunities and challenges, including with what and/or whom are you competing.
   - » Learn from similar programs and existing research on similar audiences, and then check if these findings apply to your target audiences.
4) **Set Objectives**
   - » Set S.M.A.R.T. (specific, measureable, attainable, relevant and time-sensitive) objectives.
5) **Develop the Strategy**
   - » Base your strategy on a solid foundation. Use your answers from chapter three as guides.
   - » Make the behaviours attractive, competitive, easy and popular.
   - » Develop a strategy that methodically overcomes the key barriers and highlights the benefits that are most relevant to your specific audience segments, ideally through personal interaction.
   - » Mind your Ps (product, price, place and promotion). This will most likely involve not just communicating messages but also creating conditions more conducive to adopting the desired behaviour.
   - » Make synergistic use of the proven tools of change (such as Norm Appeals, Prompts, Word of Mouth, and Obtaining a Commitment).
6) **Establish Partnerships**
   - » Establish mutually beneficial partnerships with organizations that could adopt a range of measures or policies to address barriers or provide additional resources, increase the credibility of your messages, and facilitate your access to audiences.
   - » Draw up a written partnership agreement.
7) **Pre-test and Pilot Test**
   - » Pre-testing is necessary to ensure that specific elements of the program are ready for pilot testing.
   - » Pilot testing is necessary to ensure that the program works and to measure and improve its cost-effectiveness.
   - » In both cases, refinement may be required.
   - » During pre-testing and pilot testing, compare a number of approaches so you can learn more about the strengths, weaknesses and cost-benefits of each.
8) **Implement and Improve Continuously**
   - » Plan for ongoing monitoring and evaluation. Improve continuously.
   - » Before starting your program, set a baseline (see chapter four) and select one or more control or comparison groups.
   - » Innovate and compare approaches on an ongoing basis, so you can increase cost-effectiveness over time.
   - » Monitor some measures frequently to ensure your program stays on track.

1. Form a Planning Team

This chapter looks at rallying colleagues (staff, volunteers, consultants) to benefit from their expertise, experience, networks and future support. You may simply consult with them or you may invite them to join a formal planning team that can help coordinate and deliver your program. The case studies provide examples of the types of people you might want to include on your team.

In short

Form a knowledgeable and influential planning team.

Establish an efficient schedule for the planning process, balancing the time needed to carry out the steps properly, while maintaining good momentum.

Note for small programs[15]

Recommendations

Note: The letter beside each recommendation below corresponds with the worksheet section to which it applies.

Use Worksheet 1 to organize and summarize your decisions.[16]

A. Planning team members

While some practitioners may be able to plan alone for relatively small programs, you will generally benefit from involving staff, volunteers and consultants who ***jointly*** have a good understanding of:

i. Where the program fits into the organization's mission, vision and plans, and the ability of the organization to respond to increased demand for services, if applicable.

ii. Basic TDM, social marketing, behaviour change and communications principles, as well as best practices.

iii. Key audiences, including various linguistic and ethno-cultural segments, as well as market research your organization or others have conducted.

iv. Previous and current initiatives of key stakeholders relevant to the transportation issue.

v. Partners to give credibility to the intervention, provide access to audiences or various types of resources.

vi. Organizational policies and practices.

vii. Financial commitments and ability of the organization to access funding sources, if necessary.

Ensure that individuals whose approval is crucial (those who have the authority to actually say "yes, let's proceed") are involved as early and as often as possible so that everyone shares a common sense of understanding and ownership. If you are not assured of the involvement of these decision-makers on your team, brief them throughout the process to: 1) confirm the overall objectives and process; 2) share what you know about the audience and confirm priorities; and 3) present and adopt the plan, then confirm or seek funds.

[15] *Note for small programs:* Throughout this guide look for notes like this one, highlighting the sections most relevant to you. We strongly encourage you to think through each of the guide's eight planning steps – even if you don't spend much time on all of them. In this chapter, don't miss sections A and B.

[16] The worksheets used in this guide have been adapted from Lagarde, F. (2004). Worksheets to introduce some basic concepts of social marketing practices. *Social Marketing Quarterly*, *10*(1), 36-41.

B. Other stakeholders

Make sure your planning process also includes input from representatives of the intended audience as well as key stakeholders and partners. Stakeholders include those people (both internal and external to your organization) and organizations who will be affected by or share an interest in your work. At this stage, note those that would be valuable additions to your planning team; those that may simply want to be informed and have a say in how you set your objectives and select your strategies (they may not be interested in the actual implementation); and those you will approach later to help you with implementation at chapter six (Partnerships). Decide how and when you will consult these stakeholders.

C. Schedule

Strategically establish a schedule for the planning team, taking into account such factors as financial periods, funding deadlines, and when key committees meet. Plan for a minimum of two to three meetings over a three- to six-month period, depending on the scope of the project; this will likely be the time needed to gather information, plan and work your way through the decision-making process.

Make sure your planning process also includes input from representatives of the intended audience as well as key stakeholders and partners.

D. Terms of Reference

Terms of reference are useful, so everyone knows his or her role, time commitment, and how decisions are made.

PRIMARY EXAMPLE – CASE STUDY #2 : GCC's Active and Safe Routes to School program

Here's how GCC's Active and Safe Routes to School program would have filled in Worksheet 1 at the time it was launching its School Travel Planning initiative

Worksheet 1: Form a planning team

A. Planning team members

National level:

» Green Communities Canada – the Project Lead and the Program Manager (project management)

» Cape Breton University - academic staff from the Department of Education (Child and Youth-Friendly Guidelines, sustainable happiness, sustainability)

» University of Toronto – academic staff from the departments of Geography (infrastructure aspect of transportation planning, evaluation) and Physical Activity and Health (health and psychological influences)

» Provincial leads (responsible for provincial rollouts)

Provincial level:

» Provincial lead (provincial level coordination). Leads can be NGOs, governments or health agencies.

» Ministries of health, education and transportation (to correspond with the health, education and transportation representatives steering the program within each municipality; and to help enact supportive policy changes at every level of government)

» Provincial funders

Municipal level:

» Municipal lead (municipal level coordination)

» Municipal health, education and transportation representatives

» Police

» School District representatives

School level (Glenayre School):

» Vice Principal (official administrator)

» Parent volunteer

» Consultant (got grant and ran program)

» City of Port Moody police (safety issues), roads and community program (coordination with other city programs)

» Port Moody School Board, District 43, School Board member (help legitimize program for the school; support role)

B. Other stakeholders. Who are they and how and when will you consult them?

» *National level*: Consulted with professional associations of educators, health and wellness, health promotion, planners, and national NGOs related to the policies being promoted

C. Schedule the first two to three planning team meetings

» *National and Provincial levels:* meet face-to-face once or twice a year – work mostly through email and web conferencing

» *Municipal level:* establish steering committees and statements of support, and select schools by May 2008; meet face-to-face once every two to three months

D. Terms of Reference. Who will prepare this and by what date will it be done**?**

» *National level:* GCC and its members to prepare this, based on the national funding agreement, by January 2008

» *Municipal level:* Ask municipal steering committee members to sign a Statement of Support, to be reviewed by their organizations, specifying the level of support and contributions from each organization; create Terms of Reference based on the statement of support, to be agreed to by the committee; provide templates for both agreements in the standard toolkit for participating municipalities (based on agreements used by other programs)

EXAMPLES FROM THE OTHER CASE STUDIES

#1: CFS's Employee Program was guided by its employee committee for sustainable transportation, which included a representative from each of the eight institutions within CFS, including staff from the human resources, communications, and environment functions. The committee was assisted by a project manager from Voyagez Futé, Montreal's downtown transportation management association.

#3: University of Victoria's Travel Choices TDM program is managed jointly by the Office of Campus Planning and Sustainability together with the Transportation and Parking Coordinator in Campus Security Services. A very active Bicycle Users' Committee contributes to planning concerning cycling facilities and events on campus.

#4: Whitehorse Moves was first conceived of in October 2002, during a planning charette (a type of brainstorming / visioning session). The ideas were formalized by the teams that worked on the City's Transportation Master Plan, and then by its submission to Transport Canada's Urban Transportation Showcase Program. Represented on these teams were: interested members of the public, including cyclist and seniors, and city planners, transportation engineers and environmental specialists.

#5: Winnipeg's WinSmart Showcase program steering committee included representatives from the City of Winnipeg, Province of Manitoba and additional members including local industry, local academic institutions and non-profit organizations who were going to be involved with the implementation of the project.

2. Determine Focus, Behaviours and Audiences

This chapter helps you determine your program's focus, target behaviours and key audiences, so you can concentrate your efforts where they will produce the greatest impact. Whitehorse and the GCC's Active and Safe Routes to School programs provide examples of how to do this.

In Short

Determine the unique focus, transportation behaviours, and key audiences for your initiative based on solid information.

Make the rationale and focus of your initiative very clear.

Be as specific as possible in terms of the modal changes / changes in transportation behaviours that your primary audience would adopt if you are successful, and the measures that secondary audiences (e.g., decision makers and influencers) could adopt to influence or support your primary audience.

Recommendations

The focus and rationale, transportation behaviours and primary audiences that you want to influence may already be clearly identified as part of your organization's mission or plans, or by your program or funding agreements. Decisions that have already been made may focus you on particular travel modes (for example, transit or cycling) or settings (such as the workplace or school). However, more often than not, at least one of these elements is not well defined or not based on solid evidence. Start by filling in the worksheet for those decisions already made; then use this as an opportunity to strengthen any weak or missing sections.

Focus and rationale (Worksheet 2a)

A. Main issues

List the main issues you are trying to address by changing travel behaviours (for example, traffic congestion, insufficient physical activity, or greenhouse gas reduction).

B. Why you, why now?

Justify your organization's involvement at this time, and note how important these issues are relative to others being faced by your organization. Consider organizational goals or capacity, planned activity, expectations from partners or the public, and funding opportunities.

C. Financial limitations

If you are working with a pre-determined budget, note the impact on how much you can take on, including your selection of transportation behaviours and target audiences. In an ideal budget-setting scenario, the budget would be established only after all planning steps are completed. However, it is useful to know: 1) whether senior officials have a pre-determined idea of financial/human resources and in-kind services to be allocated to your initiative; 2) what similar organizations are doing in this area; and 3) your organization's track record in securing funding and/or services from other sources. This will help keep your initiative realistic.

Behaviours and audiences (Worksheet 2b)

D. Transportation behaviours

Select the transportation behaviours / modal shifts that are most likely to have the greatest impact, given both the impact of an individual adopting the behaviour and the number of individuals likely to do so. Be as specific as you can.

The main groups of behaviour changes promoted by

ecoMOBILITY[17] are the following.

i. Reduce the amount of single-occupant vehicle driving

ii. Switch trips to off-peak hours

iii. Telework

iv. Replace single-occupant vehicle driving with:

1. carpooling
2. public transit
3. Active transportation (walking, cycling etc.).

E. Primary audiences

For each behaviour, list the primary audience segments – the people whose travel habits you want to change. For most TDM initiatives this will include car users. You will want to further segment your audience(s), as discussed in chapter three.

F. Secondary audiences

For each primary audience, list secondary audiences (those who will influence your primary audiences) – both internal and external, including partners. For most TDM initiatives, this will include the primary audiences' family members, neighbours and colleagues. Other secondary audiences may include policy makers, such as elected officials, administrators and employers who can adopt "soft" to "hard" measures in support of reduced car use. Examples of these measures include[18]:

i. Hard measures: Physical improvements to transportation infrastructure or operations, traffic engineering, control of road space and changes in price.

ii. Soft measures: workplace travel plans, personalized travel planning, public transit marketing, and travel awareness campaigns.

iii. Soft measures with hard elements: improved public transit service; parking fees and restrictions.

[17] ecoMobility website: http://www.ecoaction.gc.ca/ecotransport/ecomobility-ecomobilite-eng.cfm.

[18] Möser, G. & Bamberg, S. (2008). The effectiveness of soft transport policy measures: A critical assessment and meta-analysis of empirical evidence. *Journal of Environmental Psychology, 28*, 10-26.

PRIMARY EXAMPLE – CASE STUDY #2: GCC's Active and Safe Routes to School program

Here's how GCC's Active and Safe Routes to School program would have filled in Worksheets 2a and 2b at the time it was launching its School Travel Planning initiative.

Worksheet 2a: Focus and rationale

A. Main issues:

» Safe, walkable neighbourhoods; active, efficient and sustainable transportation; health and fitness; traffic safety and congestion; air pollution and climate change

B. Why you, why now?

» The other national-level NGO working in the area is no longer active

» No other organization has came forward to take the lead

» GCC supports community-based programs across Canada

C. Financial limitations:

» With all the stakeholders at the table, the financial costs are relatively low. Infrastructure changes may require municipal and/or school district funding but a well-organized community with a good travel plan can work through municipal council to get these items in the budget

Worksheet 2b: Behaviours and audiences			
D. Transportation behaviours List them below:	E. Primary audiences	F. Secondary audiences (who are they and what do you want them to do)?	
Walking and cycling to school	Students from kindergarten to grade eight	Elementary and middle schools	Help run the program in their schools
		Parents	» Help run the program in their schools » Encourage their children to participate » Drive and park responsibly » Turn off engines when parked

CASE STUDY #4: Whitehorse Moves

- "While our program encouraged all alternative modes of transportation, we focused particularly on bicycle travel to and within the downtown core, in which 60% of our residents work. Cycling in Whitehorse is perhaps the most reasonable form of active transportation in the spring, summer and fall, as the distances to most of the outlying neighbourhoods make walking less efficient and less probable. Public transit and carpooling are the two most realistic alternative commuting modes in the winter."

–Sabine Schweiger, Environmental Coordinator, City of Whitehorse

GCC's Active and Safe Routes to School program engaged students from kindergarten to grade eight in walking and cycling to school.

3. Gather Information (Formative Research)

This chapter discusses the types of information you'll want to find, in order to identify and prioritize the audience segments, benefits and barriers on which to focus. You'll need this information to develop your objectives and strategy. The three case study examples show the sorts of information you can get and how useful it can be in developing your program.

In Short

Identify, learn about, and segment your key audiences based on existing and new research.

Prioritize and choose the segments, barriers and benefits on which to focus.

Identify opportunities and challenges, including with what and/or whom are you competing.

Learn from similar programs and existing research on similar audiences, and then check if these findings apply to your target audiences.

This key step may take more time than you are used to. But it's time well spent and will make the next steps faster and more strategic.

Note for small programs[19]

Recommendations

Note: In this chapter there are two worksheets: Audience Analysis (Worksheet 3a) and Opportunities and Challenges (Worksheet 3b). The letter beside each recommendation below corresponds with the worksheet section to which it applies.

Audience Analysis (Worksheet 3a)

This worksheet will help organize and summarize the information you collect for each audience. In some instances, the answer may be the same for both those who have adopted and those who have not adopted the behavior; however there must be some significant differences between the two.

A. Audience

Analyze at least your primary audience.

Perform a systematic audience analysis of (at least) your primary audience, which in most cases will be drivers of single occupant vehicles. You may want to consider performing an analysis of secondary audiences that you consider important, as in the example worksheet below which looks at elementary schools as influencers of student behaviour.

[19] *Note for small programs:* You may not have much time or budget to do research. However, even small programs need to ensure they are based on a solid foundation. At a minimum, summarize the answers you already have for sections A to L. Then check your understanding with others, including some from each key audience.

B. Travel behaviour(s)

See chapter two ("Determine the focus, audiences and behaviours"). While you may be able to cluster some travel behaviours together, you will likely need to fill out more than one table to cover a range of transportation options.

C. Demographic data

For demographic data, include information that might help explain the difference between those who have adopted the travel behaviour and those who have not. Typically, this includes: the number of individuals in the audience, age, gender, level of education, family status, income, occupation, hours of work, commute distance, urban or rural setting, languages and other cultural characteristics.

D. Benefits and incentives

Consult your audiences to really understand what would motivate them (from their perspective) as well as the words they would use to express this motivation. What role does transportation play in their lives?

The benefits most often associated with specific travel behaviours and measures are the following:

- time savings
- cost savings
- convenience (short walking and cycling trips)
- avoiding traffic congestion
- exercise / fitness benefits
- pleasure / recreation
- environmental benefits
- the ability to read, work, relax on transit while carpooling
- chance to spend time with others
- independence (children)[20].

While these are generally listed in order of overall impact, the relative importance of each will vary depending on the action being promoted, the climate, the community situation, the audience segment involved, and other factors.

Based on the information gathered, which benefits will you assign a high priority?

E. Barriers

Focus particular attention on reducing barriers, especially those that have the greatest impact and that you can influence most cost-effectively.

Typical barriers associated with TDM-related behaviours and measures are:

- distance travelled
- time required
- exposure to inclement weather
- inconvenience
- lack of flexibility
- need to carry things
- need to respond to emergencies
- need to pick up family members
- lack of alternative transportation options
- no shower or change facilities
- no bike parking
- free car parking
- viewing transit use as a sign of financial need (not normal)
- forgetting to take action
- misconceptions
- dangerous road or trail conditions / safety concerns (for self or children)
- parents won't allow it (children)
- workplace won't allow it (telecommuting)[20].

Based on the information gathered, which barriers will you assign a high priority?

Figure out if barriers are real or perceived. A real barrier will need to be dealt with using concrete measures. A perceived barrier can be dealt with using information delivered by influential and credible leaders.

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[20] Transport Canada (2009). Compendium of Canadian Survey Research on Consumer Attitudes and Behavioural Influences Affecting Sustainable Transportation http://www.tc.gc.ca/eng/programs/environment-urban-menu-eng-2084.htm

Focus particular attention on understanding key barriers, like road safety and inclement weather.

F. Influencers

Pay particular attention to the person-to-person interactions that affect your audience. For influential individuals, include specific names of people, not just titles. Ideally, these leaders would be models of the travel behaviour(s) you are promoting, or should be among the first to participate in a specific promotion campaign. These individuals can potentially become influential spokespersons and partners in your strategy.

Include in your list other organizations that are already promoting the travel behaviour to your audience, as well as those who are promoting competing alternatives, like driving alone or being driven to school. What benefits do audience members perceive from the competing alternatives (including continuing to do what they are doing now)? Include these in section E on barriers and costs of choosing the travel option you are promoting. What costs are associated with the competing alternatives? These belong in section D.

G. Norms

Explore what your audience considers to be "doing the right thing", what they think their friends and colleagues are doing, and what they think "most people" do.

H. Media habits and channels of communications

Learn about which media and channels your target audiences use and how. At this point in your planning, you don't have to select the channels that you will use – you can simply identify potential alternatives for reaching your audience. Consider the full range of available communications channels listed in the Appendix. *Note for small programs*[21].

I. Membership in groups, events and places

Look for low-cost, credible ways of communicating with your audiences.

J. Segmentation

Segmentation is the process of dividing a more heterogeneous audience into smaller, more homogeneous groups based on how likely people are to respond to a particular marketing mix. For example, people travelling a kilometre or less are often more willing to walk; in this case, trip length is the segmentation variable.

Segmentation enables you to divide your audience into groups with more similar (homogeneous) members, so that your strategy and messaging can be fine tuned to each group.

In most cases past and current travel behaviours are the best predictors of future travel behaviours. Consider:

- how often audience members use the travel mode

[21] *Note for small programs*: Don't let the word "media" put you off because it doesn't make sense to use the town newspaper, radio or television. You may not have to reach that many people. More targeted media may be more relevant and affordable such as: a billboard in the company parking lot, bulletin boards in the workplace, newsletters, neighbourhood newspapers, and social media networks.

or do the travel behaviour now
- if they have done so more often in the past
- how often their friends and colleagues do
- perceived or real barriers to doing so (for example, personal safety concerns, unsafe infrastructure, and unpredictable pickup and arrival times)
- related skills (for example, cycling skills) and
- capacity to adopt the travel behaviour.

By analyzing your audiences, you may find that demographic data, such as age, ethnicity, language, education, employment or social networks, are also helpful in your particular situation. Psychographic data such as perceived benefits and readiness to change (knowledge, attitudes, and beliefs) may also be of value. Choose the segmentation variables that will help you better prioritize and develop your strategy. Then list the key distinguishing factors that people in each segment have in common.

K. Key moments

Identify key moments when your audiences are most likely to try and adopt the desired and competing travel behaviours (for example, during the spring or fall, when starting a new job or school, or having children).

L. Missing information:

Which research methods will you use to gather the necessary information to make strategic decisions?

Opportunities and Challenges (Worksheet 3b)

M. Competition

Include the main influences competing with you for your audience's attention – including advertising and promotion from vehicle manufacturers, free or subsidized transportation (for example from parents and school boards), and your audience's current travel choices. Identify the barriers/costs and benefits associated with the main ones, how to take advantage of those costs, and how to offset those benefits.

N. Community Support

Note areas where your community or setting is not supportive of the desired travel behaviours, and how you can best overcome these negative influences.

O. Other opportunities and challenges

Note the main legal, political, social, environmental, economic, business, technological, ethical or other considerations and events that represent an opportunity or challenge, and how you can best respond to them.

This additional information is provided to give you a brief overview of research methods

Secondary Research: *Start with What's Known*
The quickest and least expensive way to start gathering this information is to review reports from similar programs and the findings from past research (for example, Transport Canada's *Compendium of Canadian Survey Research on Consumer Attitudes and Behavioural Influences Affecting Sustainable Transportation*). This is called secondary research. It will suggest what questions need to be addressed by any new (primary) research.

Primary Research: *Collect New Information*
A two-step research design using qualitative methods followed by a survey is recommended for primary research wherever resources allow. Qualitative methods, like focus groups, interviews and consultations enable you to probe deeply into "what", "why" and "how" questions. A survey is then used to quantify responses and apply the findings with confidence to the larger groups that make up each of your audience segments.

For guidelines on conducting focus groups, interviews and surveys, see the Resources chapter at the back of this guide.

PRIMARY EXAMPLE – Case Study #2: GCC's Active and Safe Routes to School program.

Here's how GCC's Active and Safe Routes to School program would have filled in Worksheets 3a and 3b, at the national level, at the time it was launching its School Travel Planning initiative.

Worksheet 3a: Audience analysis and segmentation		
A. Audience: **Students from kindergarten to grade 8** (Primary Audience)		
B. Travel Behaviour: What you want them to do? Walk or cycle to school		
	Those who have adopted the behaviour	Those who have *not*
C. Demographic data	» Living within 1 km of the school	» Living more than 1 km from the school
D. Benefits and incentives: Why are/would they do the behaviour? Will incentives be required to engage this audience? If so – what kind of incentives?	» Convenience » Time savings » Independence » Socializing time » Interaction with adults	» Small incentives and recognition can help encourage trial

E. Barriers: Why would they stop / aren't they? Which barriers have the greatest impact and which ones can you influence most cost-effectively?	» If offered free busing, or a ride from a parent » If the trip distance increased significantly	» Automobile-dependence, without seeing self as part of the problem » Unsafe infrastructure in school communities, making it safer to travel in a car or by bus » Parents not allowing their children to walk in cold or wet weather conditions » Parents believing that walking consumes a much longer period of time than driving (In reality, it often takes less time and less frustration to walk a child to school) » Lack of health awareness
F. Influencers: Who has an influence on them?	» Peers » Parents » Teachers	» Peers » Parents » Teachers
G. What do they perceive the norm to be? Have most people like them adopted the behaviour?	» Varies from school to school and changes as more people walk and cycle	» Varies from school to school and changes as more people walk and cycle
H. Media habits and channels of communications	» Bulletin Boards » School newsletters » School signage	» Bulletin Boards » School newsletters » School signage
I. Membership in groups, and events and places where they can be reached	» Student / school councils	» Student / school councils
J. Segmentation: Among those who have not yet adopted the behaviour, can you identify specific segments that are more receptive than others? More successful at adopting the new behaviour? More likely to maintain it? On what basis (elimination of barriers, possible benefits, and/or demographics)? » Those living within 1 km of the school » Those with peers who are already walking to school		

K. Key moments: When are your audiences most likely to try and adopt the desired and competing travel behaviours?

» Spring (better weather) and fall (start of a new school year) although wintertime promotions have worked well too

L. Missing information: Which research methods will you use to gather the necessary information to make strategic decisions?

» Walkability study with students from 70 elementary schools, and focus groups with students at six schools

» School Travel Plan model framework for gathering data at each school site; national roll-up of the quantitative and qualitative results

a) School site visit & walkabout

b) Family survey: mode and route taken to school, barriers existing along that route, related attitudinal factors

c) People at each entrance to the school tracking the number of pedestrians/cyclists/vehicles arriving, and unsafe behaviors such as illegal parking or U-turns, unsafe crossing of roads by pedestrians

- "We had already done international best practice research in 2006, leading to a research summary report and a report of recommendations for Canada. We then conducted a walkability study with students from 70 elementary schools and followed up with focus groups with teachers and students at six schools. The students indicated that they would like to walk and cycle to/from school but it was their parents who made the decisions about how they got to school. The boys in particular said they would prefer to cycle to school in the nice weather when the distance was three km or less rather than taking the school bus. Since parent meetings hadn't been as effective as we wanted in reaching the parents, we started focusing on the students themselves as the key influencers in their families. That's one of the reasons we now organize IWALK clubs, IWALK Days, and Winter Walk Days."

–Jacky Kennedy, Program Lead, Green Communities

Based on these findings, the program started focusing on the students themselves as the key influencers in their families.

A. Audience: **Elementary and middle schools** (Secondary audience)

B. Travel Behaviour: What you want them to do? Participate in the program

	Those who have adopted the behaviour	Those who have *not*
C. Demographic data		
D. Benefits and incentives: Why are/would they? Will incentives be required to engage this audience? If so – what kind of incentives?	» Improved routes to school » Safer school zone » Builds school and community spirit » Healthier, more attentive students » Staff save time and reduce stress otherwise spent on traffic duty	» Funds for sports equipment » School walking routes signage » No idling signs » Incentives for students and classes
E. Barriers: Why would they stop / aren't they? Which barriers have the greatest impact and which ones can you influence most cost-effectively?	» Move to another school where the program is not already operating	» Time pressures and competing priorities (although the program can actually save them time and stress) » Liability concerns » Unsafe infrastructure in school communities, making it safer to travel in a car or by bus
F. Influencers: Who has an influence on them?	» The children who attend the school; successes from other local schools; media	» The children who attend the school; successes from other local schools; media
G. What do they perceive the norm to be? Have most people like them adopted the behaviour?	» Depends on the culture of the school	» Depends on the culture of the school
H. Media habits and channels of communications	» School newsletter » Local community papers	» School newsletter » Local community papers

I. Membership in groups, and events and places where they can be reached	» Parent Council	» Parent Council

J. Segmentation: Among those who have not yet adopted the behaviour, can you identify specific segments that are more receptive than others? More successful at adopting the new behaviour? More likely to maintain it? On what basis (elimination of barriers, possible benefits, and/or demographics)?

» Schools with medium to high socio-economic status; active parent councils; supportive and engaged teachers and Principal

» Specific targets as program champions within each school include: Principal, Vice-Principal, or a teacher (physical education teacher or one with a very keen interest in health and/or environment)

K. Key moments: When are your audiences most likely to try and adopt the desired and competing travel behaviours?

» When school busing services are being reduced

» When the weather is pleasant

» When they see others (other parents / teachers / schools) doing it

L. Missing information: Which research methods will you use to gather the necessary information to make strategic decisions?

» Walkability study with students from 70 elementary schools and focus groups with teachers and students at six schools

» Through the international IWALK committee, learned of the School Travel Planning approach then conducted research into international best practice to learn more (Transport Canada funded)

Worksheet 3b: Opportunities and Challenges

M. Competition: With what and/or whom are you competing for your audience's attention?

» Car-related advertising and promotion

» School busing provided free of charge to qualified students

» Parents offering their children lifts to school

» After-school activities outside the school, scheduled so close to dismissal time that the children can't get there in time by walking or cycling

» Both parents in the workplace and schedules don't allow time to walk to school

Should you compete with or join the competitor?

» Work with schools, school boards and parents to educate them on the importance of a balanced approach so policies and routines can be changed

N. Community Support: Is the community or setting generally supportive and ready or not?

» General support for child safety, child health, and reducing greenhouse gas emissions; needs to be translated into support for walking and cycling

» Some resistance to change from the school and School Boards - there is a need to relate the issue to cost to demonstrate how budgets can be cut

O. Other Opportunities and Challenges: Are there legal, political, social, environmental, economic, business, technological, ethical or any other considerations and events that represent an opportunity or challenge?

Opportunities

- Some school boards are reducing the use of school buses for financial reasons
- Increasing recognition of the link between inactivity in children and the later development of diseases such as obesity and diabetes, cancer and other lifestyle diseases
- Increased interest in and support for reducing greenhouse gas emissions related to transportation

Schools are particularly receptive to GCC's Active and Safe Routes to School Program when their school boards reduce the use of school buses for financial reasons.

Challenges

- Fiscal constraints
- Unsafe infrastructure in school communities, making it safer to travel in a car or by bus
- Liability concerns; however, we are making progress across Canada to counter these concerns by demonstrating how active travel programs can reduce liability

CASE STUDY # 1: CFS

- "A survey of employee transportation habits and attitudes found that many more than expected lived close to the work site, so we focused on active transportation measures."

–Amélie Laframboise, Investment Analyst at Fondaction, and a member of CFS's Employee Committee for Sustainable Transportation

CASE STUDY #5: Winnipeg's WinSmart Showcase (CBTM pilot)

- "For our Community-Based Travel Marketing pilot, we used information from our baseline survey and travel diaries to measure behaviour change progress and also to segment households into three groups: those who already used sustainable modes of travel some or all of the time, those who drove most of the time but who were interested in trying sustainable modes and/or reducing their motorized trips, and those who drove all of the time and were not interested in changing their behaviour. We avoided wasting resources by focusing only on the first two groups and targeting those most likely to change their behaviour."

–Beth McKechnie, Resource Conservation Manitoba

4. Set Objectives

This chapter provides a framework for developing realistic and measurable targets that you can use to measure, manage and report on your progress. It also provides examples of the objectives set by three of the case studies.

In Short

Set S.M.A.R.T. (specific, measureable, attainable, relevant and time-sensitive) objectives.

Recommendations

Note: The letter beside each recommendation below corresponds with the worksheet section to which it applies.

Use Worksheet 4 to organize and summarize the information about your objectives. Begin development of your evaluation plan while you are setting your objectives. The measurement perspective will help you design measurable objectives. A useful resource is Transport Canada's "Canadian Guidelines for the Measurement of TDM Initiatives: User's Guide", particularly the sections on assessment levels and indicators. (See also chapter eight in this guide: Implement and improve continuously).

A. Indicators

For each of the transportation behaviours you want to change (you identified these in chapter two), and for each of your key audience segments (among primary and secondary audiences), list the indicators you will use to measure progress. Ensure that you are measuring behavioural changes (the outcomes of your strategy[22]) not just the number of people who will attend events, take part in exercises, or read newsletters. You may also want to set objectives for the number who will recall messages, gain knowledge, or change attitudes, intentions or perceptions about related benefits, barriers and norms.

When deciding what indicators to use and what objectives to set, it is usually helpful to focus on a small number (a half dozen or so) of these - the ones that are most relevant and important to your organization and funders.

Ensure that you are measuring behavioural changes, not just the number of people you will reach. Shown here: students arriving by bicycle at the University of Victoria.

[22] Assessment levels F, G, H and/or I in the Canadian Guidelines for the Measurement of TDM Initiatives: User's Guide.

B. **Baseline**

Obtain your baseline data while conducting formative research (see chapter three) or as soon as possible thereafter. For each transportation behaviour that you are working to change and for each of your key primary audiences, determine the number of people who are currently doing that behaviour and how often, the current modal share and/or the distance travelled by each mode, as well as any other key indicators from section A.

C. Targets

Choose a milestone **date** when you expect to have made significant progress. Then determine the realistic **number** of members in each priority segment who will adopt and maintain the behaviours being promoted, the target modal share and/or the target distance travelled.

Start by understanding the impacts similar programs have achieved elsewhere. Then consider the circumstances in your community that might make it possible to achieve greater impacts more quickly, as well as the challenges and how you can address each. Take into consideration the current size of each segment and the projected size at the end of this time period.

PRIMARY EXAMPLE – CASE STUDY #3: University of Victoria

Here's how the University of Victoria would have filled in Worksheet 4 in 2009, based on its Sustainability Action Plan: Campus Operations, 2009-2014.

Worksheet 4: Objectives

Audience/Segment	A. Indicators	B. Baseline	C. Target - number	Target - date
Students and staff	Modal share of bus, cycling, and carpooling	2008: 62.5%	70%	2014
Students and staff	Per capita proportion of bicycle use	1996: 6.9%	More than double	2014
Staff	Number of fleet vehicles that consume fossil fuels	71%	40%	2014

CASE STUDY #2: GCC's Active and Safe Routes to School Program (Glenayre Elementary School)

- "The school travel plan set the objective. Baseline surveys had found that prior to the program about 50% of students were walking to school. The objective was to have 100% of the students walking to school within one year."

–Bonny Gibson, Parent Volunteer

CASE STUDY #5: Winnipeg's WinSmart Showcase (Community-Based Travel Marketing pilot)

- "The critical indicator for the WinSmart Community-Based Travel Marketing pilot was a 2% reduction in transportation emissions by participating households. Associated with this indicator were expectations of an increase in the mode share for walking, cycling, transit and carpooling, and a corresponding decrease in driving alone. The pilot had additional objectives to ensure that we could have confidence in our findings (we wanted to achieve a 40% or higher response rate on the baseline travel survey) and would engage a meaningful number of households at a substantial level (we wanted to provide personal trip planning assistance to at least 100 households)."

–Beth McKechnie, Resource Conservation Manitoba

5. Develop the Strategy

This chapter looks at how to methodically overcome key barriers and make particular travel behaviours more fun, easy and popular. You'll find lots of ideas for doing this, both in the Recommendations sections, and in the many case study examples. Once you've completed this chapter you'll have outlined your strategy for achieving your objectives.

In Short

Base your strategy on a solid foundation. Use your answers from chapter three as guides.

Make the behaviours attractive, competitive, easy and popular.[23]

Develop a strategy that methodically overcomes the key barriers and highlights the benefits that are most relevant to your specific audience segments, ideally through personal interaction.

Mind your Ps (product, price, place and promotion). This will most likely involve not just communicating messages but also creating conditions more conducive to adopting the desired behaviour.

Make synergistic use of the proven tools of change (such as Norm Appeals, Prompts, Word of Mouth, and Obtaining a Commitment[24]).

Recommendations

Use Worksheet 5 to sketch out your strategy. Base the strategy on what you have learned about your target audiences in chapter three. Reduce the barriers to and costs of adopting the behaviour you are promoting, while making it as easy, rewarding and popular as possible. Ensure that what you are *selling* is better than the *competition* (the current behaviour and/or other competing behaviours).

Note: The letter beside each recommendation below corresponds to the worksheet section to which it applies.

A. **Barriers** ('Price' and 'Place' – two of the *Four Ps* of marketing)

Make it easier for people to take each new step, adopt or maintain the behaviour, by overcoming specific barriers. Use incentives if necessary to encourage trial or subsequent, deeper commitments. If you can't maintain the incentives indefinitely, don't use them on an ongoing basis as they can undermine intrinsic motivation so that once they are removed the behaviour might not persist.

Examples of incentives / disincentives:

i. Cash, a free transit pass, or membership in a fitness club, for people who do not have a dedicated parking spot at work, or do not usually use their car to get to work

ii. Cash for commuters to use bikes—rather than cars—to reach the public transit station

iii. Charging for parking; increasing the parking fee

iv. Designated, closer parking places for carpoolers and vanpoolers

v. Hot drinks for those walking to school or work in the winter

[23] Adapted from William A. Smith: *Make it fun, easy and popular* – Source: Smith, W.A. (1999). Marketing with no budget. *Social Marketing Quarterly, 5*(2), 6-11.

[24] These tools are explained in further detail at www.toolsofchange.com and www.cbsm.com.

TYPICAL BARRIERS	COMMON SOLUTIONS
Distance travelled, time required	Make it easier to take public transit part of the way, and an active mode like walking or cycling closer the other part (e.g. safe bike parking near transit stations, bike racks on transit) If the nearest transit station is too far away from a workplace, provide a shuttle service to it
Exposure to inclement weather	Provide shelter when waiting for public transit Show how others deal with inclement weather Ensure that participants are aware of suitable clothing choices and where to get them, and have access to adequate change facilities at workplaces and public institutions
Inconvenience	Highlight the convenience of alternative options (e.g. being able to read on the bus or when carpooling, not having to find parking, and the ease of walking and cycling short distances) Allow public transit users convenient access (e.g. through their smart phones and computers) to track the moment-to-moment status of any bus or train, so they know the exact time when their ride is going to depart and arrive
Lack of flexibility, need to make local business trips during the day	Taxi chit, transit chit, fleet car and guaranteed ride home programs Car sharing and bike sharing services Make it easy for participants to switch between alternatives (e.g. carpool some days and drive alone other days) Flexible work hours
No shower or change facilities, no bike parking	Provide access to adequate facilities
Free car parking	Charge for parking or provide participants with a cash equivalent if they use other modes
Dangerous road or trail conditions / safety concerns (for self or children), parents won't allow it (children)	Conduct *walkabouts* to identify dangerous situations and then provide safer infrastructure, such as safer intersections, better road markings and dedicated cycling paths Provide ridematching services that screen participants Provide road safety training courses Organize walking school buses, so that parents take turns walking their children to

	school Promote the use of cycling helmets and make it easier and less expensive to buy suitable attractive ones Involve parents in walking and cycling with their children, so that they better understand and support activities that are safe
Workplace won't allow it (telecommuting)	Educate employers and employees about the benefits including: • Increased productivity; • Staff retention and loyalty (competitiveness); • Contribution to green commuting (corporate image); • Reduced operating expenditures; and • Business continuity during emergencies. Promote and/or provide existing tools for employers and employees to implement a formalized telecommuting arrangement, such as templates for a Telework Policy in the workplace and for agreements between the organization and employees outlining responsibilities, performance measurements, IT requirements, etc. [25]
Forgetfulness and competing priorities	Prompts (for example, a key fob that reminds the driver of his or her interest in and commitment to using alternative modes) Engage your audiences when and where they are most receptive to adopting alternative travel options; work and school are two settings that have proven particularly successful

B. Product (another of the *Four Ps* of marketing)

Highlight the benefits of the travel choices you are promoting and consider how you could maximize these benefits. For example, if time savings and convenience are two of the main benefits of cycling to work or school for those who live close enough, provide suitable bicycle parking facilities located strategically to minimize time and effort. As another example, high-occupancy vehicle (HOV) priority lanes can offer significant time reductions for those driving in multiple-occupant vehicles, including in carpools and vanpools, and make their travel times more reliable.

C. Positioning and branding

Positioning and branding are ways of making a particular travel option, as well as your organization and initiative, stand out from the competition. When positioning a travel option, highlight for your audience how it is more important/attractive and beneficial than other options (including their current travel choices). Focus on one or two benefits or clusters of benefits that are most important to your audience. Ensure that your strategy is consistent with your positioning and will deliver what you "promise." Choose your brand elements (name, slogan, terms, packaging, graphic and/or sound elements) to clearly and consistently communicate your positioning.

D. Additional Tools of Change

Help people remember to do the action by providing prompts as close as possible to the time and place where they make their travel choices. Build motivation for continuing the action and sustain motivation and momentum towards change over time, by obtaining incremental commitments; using feedback, recognition, and norm appeals; and by facilitating word-of-mouth communication.

[25] Based on Calgary's "How to Use Telework" webpage: http://www.workshiftcalgary.com/workshift-business/how

Here are some common tactics used to do this:

TOOLS OF CHANGE	COMMON TACTICS
Obtaining a commitment and buddy systems	Program membership Oral or written agreement to try a travel option or to use it more often Pairing up participants (buddies) to keep each other on track Oral or written agreement to have name included in listing of participants Asking for increasingly demanding agreements over time
Feedback and recognition	Articles in newsletters, newspapers Recognition programs for people and organizations who use alternative transportation most often Celebration events
Norm appeals	Profiling opinion leaders who are already using the travel option (e.g. senior management in a business setting) Profiling people who your audience considers to be like them, who are already using the travel option Publishing the names of participants, or listing them on a poster Making participation more visible • Logo or messaging on t-shirts, bicycle decals, stickers, and pins • Bike rallies and workshops • Bike racks in highly visible locations • Cycle-to-school/work
Prompts	Reminder cards Posters Key chains with a message Automated emails asking for participants to enter their travel choices over the past week
Word of Mouth	Making participation more visible (see Norm appeals, above) to encourage people to talk with others about their transportation choices Asking program participants to invite their friends and colleagues to attend information sessions and/or participate

E. Promotion (1) –Messaging (another of the *Four Ps* of marketing)

Make your communications vivid, credible, personalized and empowering. Pre-test them with your key audiences to ensure that they are on the mark and to improve cost-effectiveness (see chapter seven for details on pre-testing).

F. Promotion (2) – Channels of communication (another of the *Four Ps* of marketing)

Select a combination of channels (including key influencers, media, events and settings) that are readily accessible to you and will reach the majority of your priority audiences. Do you have contacts or access to some of these channels, groups and events that make them more realistic options given your budget? Also specify when and how often you will use each channel. A list of channels is included in the Appendix.

Community-based social marketing emphasizes the use of interpersonal communications, which are understood to be most powerful (for example, from supervisors, teachers and coaches, as well as peers, family members and opinion leaders). Remember that modest media activities, such as postcards and word-of-mouth communication, can be just as effective as large-scale media campaigns. Consider mass media if you are trying to reach a large number of people and if it would be more cost-effective than reaching them one by one.

When developing your communications strategy, plan for frequent exposure in whatever channels you use. Exposure gained through frequency and multiple channels is a success factor in most communications campaigns. This is primarily due to the fact that people vary in their timing and willingness to respond to a message. "The more times the message is made available, the more likely the audiences are to hear/see it when they are ready to attend to it"[26]. Successful campaigns are not just a matter of the right messages delivered to the right audiences, but also a result of the right levels of frequency over time.

[26] Hornik, R.C. (2002). Exposure: Theory and evidence about all the ways it matters. *Social Marketing Quarterly, 8*(3), 30-37.

PRIMARY EXAMPLE – CASE STUDY #5: Winnipeg's WinSmart Showcase

Here's how Winnipeg's WinSmart Showcase would have filled in Worksheet 5.

Worksheet 5: Develop the strategy

A. Barriers / Price and Place: What are the most important barriers that discourage your target segments from adopting the desired travel behaviour? Which ones can you reduce and how will you do that? Will you need to introduce incentives or disincentives?

Winnipeg's WinSmart modeled cycling and engaged people in conversations about cycling and sustainable transportation, by having trained Travel Ambassadors deliver requested resources by bicycle.

Personal Safety

» Active Transportation Pathway designed to discourage automobile traffic along route and provide safe transportation connections for an uninterrupted route (e.g., paved path connections through parks & right-of-ways); improved lighting for visibility and safety

Lack of information / misinformation / unreliability of information / concern over inclement weather / inertia:

» Real-time Electronic Bus Departure Displays, New Park and Ride Facility

a) New heated shelter

b) Real-time bus departure information at six locations to increase convenience and ease of use (e.g., lets users know if they missed their bus or if a bus is delayed) and reduce concerns about waiting for a bus

» Community-Based Travel Marketing Pilot Project

a) Individual trip planning assistance tailored to each household's circumstances – for example, helping people learn how to plan a trip by bus using Winnipeg Transit's online trip planner, or providing advice on what type of gear makes commuter cycling practical or which route to ride

b) Order request form for a variety of resources at no cost, such as a bike map, a neighbourhood-specific walking and cycling map, transit schedules, a walking brochure, information on idling and carpooling, cold weather cycling brochure, and much more

c) Green Your Travel neighbourhood map emphasizing walking and cycling for short trips and highlighting nearby popular destinations (such as community centres, schools, grocery stores, pools, and library branches); scale on map to show how long it would take to walk or bike, to counter the tendency to overestimate time required

A. (continued) Where and when will your audience initiate the action or access the service being promoted? What facilities, systems, times and other factors can make the desired transportation options more convenient and pleasant?

» Active Transportation Pathway, providing enhanced path connections and safety features to an existing route preferred by users

» Real-time Electronic Bus Departure Displays, New Park and Ride Facility, enhancing convenience

» Community-Based Travel Marketing Pilot Project: Information and incentives delivered to household doors

B. Product: How can you improve on your product? How are you going to make the desired travel choice more attractive, competitive and popular?

» Active Transportation Pathway, enhanced signage, and complementary active transportation paths in adjacent neighbourhoods

» Real-time Electronic Bus Departure Displays, New Park and Ride Facility

» Community-Based Travel marketing Pilot Project: Green Your Travel neighbourhood map tied into local shopping

C. Positioning and branding: How do you want the audience to see the desired behaviour and your initiative or organization? Will you use some elements (e.g., name, slogan, terms, packaging, graphic and/or sound elements) to brand the behaviour or your initiative?

» The program will focus on increased accessibility to safe, convenient and reliable routes and connections for transit and active transportation modes. No unified brand at this stage

D. Additional Tools of Change: How and when will you prompt people to do the behaviour? How will you build motivation and reinforce the behaviour over time? For example, will you ask for commitments at key stages, raise the visibility of participation (norm appeal) and provide feedback and recognition?

Community-Based Travel Marketing Pilot Project

» Obtaining a Commitment: answers on baseline survey indicating an interest in trying alternative modes; subsequent request for additional information and resources

» Incentives: for submitting an order request – free bike light and reflective strap or pedometer plus tote bag

» Recognition: provide households segmented as regular users with an umbrella and tote bag (a reward for using sustainable modes of transportation at least some of the time, and encouragement to continue) whether or not they submit order request form

» Norms and Word of Mouth: deliver requested resources, rewards and incentives on bicycle by trained Travel Ambassadors (model cycling and engage people in conversations about cycling and sustainable

transportation)

E. Promotion – messaging: What messages will you convey? Will they highlight benefits, norms or influential individuals, promote ways to overcome barriers and/or include specific calls to action?

» Try sustainable travel options – get your feet wet by giving it a try or using sustainable modes more often

» Highlight benefits and ease of trying another mode for at least some trips

» Highlight increased accessibility to safe, convenient and reliable routes and connections for transit and active transportation modes

» Emphasize popular destinations available within the neighbourhood or nearby, that are easily accessible using transit and active transportation modes

F. Promotion – channels: What combination of interpersonal channels (e.g., word-of-mouth, home visits, events, workplace and school place programs) will you select to convey your messages? What combination of other media channels will you select to convey your messages?

Park & Ride: 11-week editorial plus advertisement package with local community newspapers, featuring a draw for those who try out the new facility (prize - one year of paid car insurance). Advertisements in buses and on the city web site. Visibility of the Park and Ride itself and on-site signage

Active Transportation Path: Signage, inclusion in cycling maps, word-of-mouth from current users noticing the improvements

Real-time bus departure displays: media advertising (e.g., on buses, web site), word-of-mouth

Community-Based Travel marketing Pilot Project

» Order request form and trip planning request sheet mailed to households segmented as most likely to change their travel behaviour

» Telephone follow-up to confirm the mailing has been received, answer any questions, and encourage households to complete and return the form

» Reminder letter to households that have not yet responded after three weeks

» Requested resources, rewards and incentives delivered to households by trained *Travel Ambassadors* on bicycle with trailer

CASE STUDY #1: CFS

CFS offered free bicycle tune-ups each spring (image courtesy of Vélo-Québec and Voyagez Futé).

- "By choosing more environmentally-friendly ways of getting to work, CFS employees earn special points in our "CarboPOINT" program, calculated according to the likely reduction in greenhouse gas emissions. CarboPOINTs can be redeemed each year in exchange for up to $250 worth of outdoor gear, gift certificates for fair trade and organic products, health care services or charity donation. To make it easier to make these choices, we also provide 50% of the cost of monthly transit passes, a "public transit try" program for drivers, assistance in finding matches and reserved indoor parking for carpool drivers, and free bicycle tune-ups each spring. Those who leave their cars behind qualify for up to four reimbursed emergency trips home each year and use of a local car share service for work-related trips during the day."

  –Amélie Laframboise, Investment Analyst at Fondaction and a member of CFS's Employee Committee for Sustainable Transportation.

CASE STUDY #2: GCC's Active and Safe Routes to School Program (National level)

- "Because safety concerns were a key barrier to parents allowing their children to walk to school, we helped schools organize "walking school busses" so that parents took turns walking groups of children to school. Family surveys provided information to each school about how students were getting to school and existing barriers / safety issues along these routes. The walkabouts then brought together all of the key stakeholders (politicians, parents and school administration) to observe these safety concerns, determine built environment issues, and brainstorm short and long-term solution. That way they were fully aware of the issues, had begun discussing them with the other participating decision makers, and had become invested in finding a solution.

The GCC's walkabouts brought together all of the key stakeholders to observe safety concerns and fin solutions, so they were aware of the issues, had begun discussing them with other decision makers, and had become invested in finding a solution.

"Based on our research, we focused on the students themselves as the key influencers in their families. We organized IWALK clubs, IWALK Days, and Winter Walk Days that were easy to join, and that led to further commitments to walk and cycle at other times as well. We also encouraged the use of small incentives and recognition for encouraging initial and increasing involvement in the program. To increase word-of-mouth promotion and norm

appeals, each student in the pilots received a pencil case with the logo "It's Really Cool to Walk to School," along with pencils bearing the same logo. In addition, teacher/principal champions at each of the 12 pilot schools received reusable mugs bearing the same message. Our longer-term strategy is to get the school boards and municipalities to develop more supportive policies, by engaging enough schools across each municipality to ask for those changes."

–Jacky Kennedy, Program Lead, Green Communities

CASE STUDY #3: University of Victoria

- "To increase the convenience of cycling on campus, we provided more than 2,900 bike parking spaces-including 96 bicycle lockers for rent, covered bicycle shelters, clothing storage lockers, shower and change room facilities (now available in 9 buildings), electric bike charging stations, a self-service bike repair kiosk, pressurized air hoses, a towel service, bicycles for facilities and maintenance staff to use on their rounds, and a bike bursary program for students. We also widely promoted the annual Bike to Work events with high participation rates of both staff and students. We improved walking infrastructure, for example through crosswalk improvements and improved roadway signage. To promote use of transit, we introduced discounted universal student transit passes (U-Pass) and employee discounted transit passes (E-Pass).

UVic provides a self-service bike maintenance and repair kiosk, with pressurized air hoses.

"We arranged for staff who do not own a vehicle to get free membership in the Victoria Car Share Co-Op, providing access to 20 car share vehicles in greater Victoria, including four on campus. We also arranged for University staff who get to work using sustainable modes, to access a University vehicle for personal or business use during the day. We set automobile parking fees at market rates (i.e. we do not subsidize parking) and provide designated parking for those who rideshare and carpool/vanpool. We also reduce the number of trips through more on-campus housing and videoconferencing. We have created "Green Event" guidelines that advise event planners to encourage conference and event attendees to travel to campus using sustainable transportation such as transit, carpool, cycle or walk."

–Rita Fromholt, Sustainability Coordinator, University of Victoria

CASE STUDY #4: Whitehorse Moves

- "We did a number of things to make walking and cycling more competitive with driving. We improved active transportation road and trail infrastructure leading to and within the downtown core, by introducing new cycling lanes, multi-use trails, connector paths and stairways, road-diets, bike parking stalls, a new roundabout at a key intersection, and a new pedestrian and cycling bridge. We also offered free basic bike maintenance courses, held commuter challenges, and ran a "look who's cycling now" feature in our local newspaper. Our long, harsh winters posed a particular barrier. We ensured that clearing key trails after snowstorms had equal priority to clearing key roadways for automobiles. We also went with seasonally specific themes – walking and cycling in the spring and summer; carpooling and transit in the fall and winter."

–Sabine Schweiger, Environmental Coordinator, Town of Whitehorse

6. Establish Partnerships

This chapter discusses partnering with organizations that share the same interests and goals to reduce barriers, increase benefits, improve the credibility of your messages, and facilitate access to your audiences. This can involve formalizing further activities with the organizations represented on your planning team and also reaching out to additional organizations. You'll find ideas for the nature and scope of possible contributions, and potential benefits that might attract partners, in the *Whitehorse Moves* case study. Once you've completed this chapter you'll be ready to approach potential partners.

In Short

Establish mutually beneficial partnerships with organizations that could adopt a range of measures or policies to address barriers or provide additional resources, increase the credibility of your messages, and facilitate your access to audiences.

Draw up a written partnership agreement.

Recommendations

Note: The letter beside each recommendation below corresponds with the worksheet section to which it applies.

Use Worksheet 6 to organize and summarize your thinking.

Check if your organization has a partnership or sponsorship policy, or if it should develop one before approaching partners, especially from the private sector. Engage partners at every step, communicate regularly, and treat your various partners and sponsors fairly.

A. Needs Sought

List the needs that are the most important to fulfill from partnering. Consider possible contributions towards: credibility, access to your target audiences, supportive policies, and resources to implement your strategy (including funding, staff, volunteers, know-how, program materials, and facilities).

B. Possible organizations

Given your needs, list possible partners that could help in those areas. Circle the ones that could be most helpful.

C. Acceptability

Of those you listed, note which would be partners that would be acceptable to your organization, audience, funder, the media and other key stakeholders.

D. Nature and scope of contribution

Note specifically how you would like each organization to contribute.

E. Benefits to them

Before approaching potential partner organizations, analyze them as you would analyze any other audience. They will expect benefits, may see barriers and are likely to consult other people before agreeing to your proposal. Build your case accordingly.

F. Notes

If the potential partner would be more likely to respond positively if asked by someone they already know and trust, consider who could make that request for you. Also note any particular terms of the agreement that come to mind, and how you might put your mutual commitments in writing.

PRIMARY EXAMPLE – CASE STUDY #4: Whitehorse Moves

Here's how Whitehorse Moves would have filled in Worksheet 6.

Worksheet 6: Establish partnerships

A. Needs Sought: Expertise, funding for infrastructure improvements, promotion, clearing trails in winter

B. Possible organizations	C. OK?	D. Nature and scope of contribution	E. Benefits to them	F. Notes
Cycling Association of the Yukon, Riverdale Community Association, Yukon Council on Disability	OK	» Expertise (design and implementation, accessibility issues)	» Meet policy / workplan objectives	
Government of Canada – One Tonne Challenge	OK	» Funding (consumer research survey, promotional slide at theatre) » Promoting links with climate change	» Meet policy / workplan objectives	
Icycle Sport	OK	» Incentives (prizes)	» Community promotion and good will	
Klondike Snowmobile Association	OK	» Clearing trails in winter (after snowfalls, packing the main trails into and out of downtown)	» Community service » Recreation opportunity	
Main Street Yukon	OK	» Support and advice from downtown businesses » Funding (landscape planter boxes)	» Tourism benefits from improved trail infrastructure	

Northern Climate Exchange	OK	» Promotion to Yukon College students and staff	» Meet policy / workplan objectives	
Rec. and Parks Assoc. of the Yukon	OK	» Financial support » Expertise	» Meet policy / workplan objectives	
Rotary Clubs of Whitehorse	OK	» Funding ("purchase a plank campaign" for new pedestrian bridge)	» Community service	
Skookum Asphalt	OK	» Expertise (design and construction)	» Community service and public relations	
Transport Canada	OK	» Contribution towards funding » Expertise, advice and opportunities to exchange ideas with others	» Meet policy / workplan objectives	
Yukon Electrical Company Ltd.	OK	» Funding (improved street and trail lighting)	» Meet policy / workplan objectives	
Yukon Energy Corporation	OK	» Funding (new pedestrian bridge)	» Meet policy / workplan objectives	
Yukon Territorial Government	OK	» Funding (cycling commuter map)	» Meet policy / workplan objectives	

- "We knew it was important to clear the walking and cycling pathways in the winter, but we didn't have the resources to do it ourselves. One of our partners is a local snowmobile club and they've been packing the main trails into and out of downtown along the waterfront."

  –Sabine Schweiger, Environmental Coordinator, City of Whitehorse

7. Pre-test and Pilot Test

This chapter describes ways to keep checking with reality as you develop your program, to identify and resolve weaknesses, ensure the program will work, and improve its cost-effectiveness. The case study examples from GCC's Active and Safe Routes to School Program and Winnipeg's WinSmart Showcase illustrate both in-depth and quick-and-dirty ways of doing this testing. Once you've completed these tests, you and your managers / funders can have confidence investing more resources in your program.

In Short

Pre-testing is necessary to ensure that specific elements of the program are ready for pilot testing. *Note for small programs*[27]

Pilot testing is necessary to ensure that the program works, and to measure and improve its cost-effectiveness. *Note for small programs*[28]

In both cases, refinement may be required.

During pre-testing and pilot testing, compare a number of approaches, so you can learn more about the strengths, weaknesses and cost-benefits of each.

Recommendations

Note: In this chapter there are two worksheets: Pre-testing (Worksheet 7a) and Pilot testing (Worksheet 7b). The letter beside each recommendation below corresponds with the worksheet section to which it applies.

Pre-Testing (Worksheet 7a)

A. Purpose and Timing

Write down what you want to learn from pre-testing, and note when you will need that information. You can pre-test your strategy, tactics, messages, information products and communication channels, and you can pre-test at early concept stages as well as when developing materials. Do not overreact to pre-test results – use your judgment. Sound planning in previous steps should not create too many surprises.

Before developing your own program materials, you may want to check to see if there are existing communication products that could be used (with permission, of course) *as is* or that could be adapted for your situation. It is advised that you pre-test these to see how well they would work for your target audiences and what (if any) changes would be required.

Typically, pre-testing aims to learn about one or more of the following factors:

i. *Intrusion:* When testing tactics, messages, information products and communication channels, you can check to see if your approach would be able to break through the

[27] *Note for small programs and those with less financial or organizational capacity*: This step need not be onerous. Consider going to some pre-scheduled meetings (that may have a different purpose but include your target audience), and gathering a few volunteers from your target audience who are willing to do a focus group in exchange for a small incentive. If the people you meet with are not representative of all your key audience segments, account as best you can for these missing opinions.

[28] Similarly, you can pilot test even with a very small project and a shoestring budget. When we say start on a relatively small scale, we are simply suggesting that you test out and improve your approach until you are satisfied that it will meet your objectives, before committing to widespread implementation.

clutter of existing information and get your audience's attention.

ii. *Impact on barriers and motivators:* Test if your target audiences think your approach would successfully address their main barriers to adopting the transportation behaviours you are promoting, and if the approach would help motivate them to do the behaviours.

iii. *Impact on behaviour:* Ultimately, you will want to know if your approach is likely to bring about the desired changes in travel behaviour and what you can do to make this more likely.

iv. *Other factors:* You can also use this opportunity to check the credibility, relevance and appropriateness of your approach. If you are pre-testing messaging or communications products, ask if anything is confusing or offensive and also check for overall comprehensibility and recall.

B. Participants

Decide which segments of your audience you want to include and exclude in testing.

C. Method

Consider using focus groups, interviews, an "advisory group", or trying to have your item added to an agenda of a pre-scheduled meeting (that may have a difference purpose but that includes your target audience).

D. Questions

To get you started, we've included the following list of typical pre-testing questions[29]

i. What is the main idea of the (program strategy / concept for a communication product - such as an ad, brochure etc. / mock-up of the communication product)? What is the main message you get from it?

ii. Who do you think it is intended for? (this helps assess if your target audiences think it is relevant to them)

iii. What action does it want you / them to take?

iv. How likely would you be to take that action? If unlikely, what would it take?

v. What aspects will work in influencing you and people like you to … (the transportation behaviour being promoted)?

vi. What aspects won't/don't work? What, if anything, discourages you from (doing the behaviour / making the change)?

vii. Was anything offensive (messaging, images, etc.)? If so, what didn't you like? Who would it offend? If it was offensive, why? How can it be rectified?

viii. What, if anything, did you particularly like? Why did you like it? What, if anything did you particularly dislike? Why did you dislike it? What could make it better?

ix. When testing messages: Was anything hard to understand? If so, what? Was anything hard to believe? If so, what?

When asking questions, order matters. To avoid biasing answers, wait until later in a session to explain your program's objectives, move from open-ended questions towards ones that ask or probe for specific answers, and test concepts before messaging and graphics. If you want to get at participants' initial responses before being influenced by others in the group, ask them to write down their comments before sharing them.

You can ask about behavioural intentions before and after presenting your material, to test for impact on behaviours.

Pilot Testing (Worksheet 7b)

Pilot testing enables you to test out your approach on a small scale and make improvements before rolling it out more broadly. Evaluation results may indicate that you are likely to meet your objectives using the approach - i.e. your CBSM strategy is ready for broader implementation, with some improvements to increase program impacts and reduce cost of delivery. On the other hand, the results may indicate that the approach is not successful enough to justify expansion of scope; in this case, it may be appropriate to adjust the strategy in light of lessons

[29] Many of these points have been adapted from Siegel, M. & Doner Lotenberg, L. (2007). *Marketing public health – Strategies to promote social change (2nd ed.).* Sudbury, Massachusetts: Jones and Bartlett Publishers

learned and to re-pilot. If you don't have a budget for pilot testing, consider using part of your research budget for this purpose.

E. Participants

Pilot test your entire strategy on a relatively small scale to allow for troubleshooting problems and making improvements before widespread implementation.

F. Evaluation Method

The monitoring and evaluation methods used during the pilot testing phase should be as similar as possible to those developed for use during full-scale implementation. Randomly select one or more groups that will be approached according to your strategy (remember to compare a number of approaches, so you can learn more about the strengths, weaknesses and cost-benefits of each). At the same time, randomly select one or more groups that will serve as a comparison (control" groups). Ensure that you are able to collect some impact data on an ongoing basis throughout the pilot (not just at the end of it) so you make adjustments as necessary and avoid a failed pilot.

G. Data to Collect

Collect data for each measure (see also chapters three and eight), starting from before your pilot starts (baseline) and lasting for a while afterwards (to measure how your impact is sustained).

FIRST EXAMPLE – Case Study #2: GCC's Active and Safe Routes to School program.

Here's an example of a quick-and-dirty pre-test for a DVD, and a more involved pilot study, by GCC's Active and Safe Routes to School program

Worksheet 7a: Pre-testing

A. Purpose and Timing (What do you want to learn? When should you carry out the pre-test(s)?)

Planning to use a DVD on walking and cycling safety for children, designed for the classroom use, created in British Columbia by ICBC in 2006/7; pretest by December 2008 to see if it would be used by teachers under Ontario's new curriculum

B. Participants (Which segments of your audience do you want to include and exclude in testing?)

Five teachers

C. Method: Send the DVD to them and get their comments

D. Questions: Would you use it? How often? For what purpose? How much preparation work would you need to do before using it in your classrooms? What would make it easier to use and more helpful to you?

Worksheet 7b: Pilot testing

E. Participants

» Elementary schools in each of four provinces (NS, ON, AB and BC) – 3 pilot and 2 control schools per province (20 in all)

F. Evaluation Method

» Hands-up classroom survey

» Family survey

» Optional: Traffic/pedestrian/cyclist counts (requires stationing people at each entrance to the school, so it is very labour intensive)

G. Data to Collect

» **Hands-up classroom survey** – mode of transportation used by every student in the school to AND from school for one week

» **Family survey** – information from every family about present mode of school transportation, routes taken to school, existing barriers along those route, and attitudes towards school travel

» Optional: Traffic/pedestrian/cyclist counts – number of pedestrians/cyclists/vehicles arriving via that entrance; unsafe behavior

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SECOND EXAMPLE – Case Study #5: Winnipeg's WinSmart Showcase (Community-Based Travel Marketing pilot)

The WinSmart *Community-Based Travel Marketing* pilot tested the effectiveness of the individualized marketing model within the Winnipeg context. It also served to build local capacity and expertise to deliver such a program in advance of a large-scale application. Here's how it would have filled in Worksheet 7b.

Worksheet 7b: Pilot testing

E. Participants

A total of 2,200 households out of a possible 9,600 households in the pilot project area to be randomly selected for participation. In future, given ample budget, every household within the selected neighbourhood(s) would be invited to participate

The neighbourhoods and number of households selected to participate in the pilot project are based on:

» Location within the Pembina Corridor, which represented the focus of the WinSmart initiatives

- Mix of demographics in the households reached
- Walking and cycling proximity to destinations and amenities
- Good access to transit
- Proximity to the new WinSmart Active Transportation Pathway, which was under development
- Project timeframe and budget parameters

F. Evaluation Method

One year after the baseline travel survey, participating households complete a follow-up survey and the data from the two surveys are compared to identify shifts in travel behaviour and to quantify reductions in household transportation emissions

G. Data to Collect

Household information (name, address, phone number, number of people living in the household and number of motorized vehicles in the household); demographics for each household member (gender, year of birth, valid driver's licence, employment status); general transportation profile for each household member (frequency of use of public transit, walking, cycling, carpooling); interest in changing behaviour; and one-day travel specifics for each one-way trip (time of trip start, origin, destination, mode, time of trip end, distance, whether a motor vehicle is available for the trip)

The WinSmart Community-Based Travel Marketing pilot tested the effectiveness of the individualized marketing model within the Winnipeg context.

8. Implement and Improve Continuously

This chapter looks at how to ensure your program stays on track, evaluate impact, and increase cost-effectiveness over time. You'll see the logic model, timetable and schedule for GCC's Active and Safe Routes to School Program, and find out the impacts of each of the five case study programs. After doing this final step, you'll have a social marketing plan for changing transportation behaviours.

In Short

Plan for ongoing monitoring and evaluation. Improve continuously.

Before starting your program, set a baseline (see chapter four) and select one or more control or comparison groups.

Innovate and compare approaches on an ongoing basis so you can increase cost-effectiveness over time.

Monitor some measures frequently to ensure your program stays on track.

Evaluate impact measures at key milestones.

Establish a realistic and optimal timetable and budget.

Recommendations

Note: The letter beside each recommendation below corresponds with the worksheet section to which it applies.

Use Worksheets 8a, 8b and 8c to organize and record your thinking. Plan to innovate and compare approaches on an ongoing basis so you can increase cost-effectiveness over time. Consider hiring an evaluation expert to assist you and maintain objectivity.

Logic Model and Evaluation Methodology (Worksheet 8a)

Summarize your monitoring and evaluation scheme by mapping out your logic model. You can use this model to summarize how your strategy is expected to work and quickly establish a common language and point of reference – for example, when gaining cooperation and approvals from within your organization and when approaching potential partners and funders. The model also provides a structure for evaluating progress towards your objectives, explaining any deviations from plan, and identifying opportunities to increase cost-effectiveness. This structure can also be used to monitor your work as you go and to ensure that your strategy is delivered according to plan, is reaching the right audiences, and is successfully changing travel behaviours.

Use your logic model to summarize how your strategy is expected to work and quickly establish a common language and point of reference.

A. Inputs

List all of the resources that will contribute significantly to achieving your program objectives. Include, for example, your program budget (the total from Worksheet 8c), the number of staff and volunteers, partner resources, and anticipated infrastructure improvements beyond your control (such as a new cycling trail). When evaluating your program, account for any changes to these and how that may have affected your results.

B. Outputs

Write down the main ways by which you will reach out to and influence your target audiences (these are the components and deliverables of your marketing mix, from chapter five). To set *Promotion* targets, note how many members of each target audience you will reach, how frequently, and though what communication channels. To set targets for the other three Ps of marketing (*Product, Price and Place*), note the ways you will have reduced key barriers to the travel behaviours, and other ways you will have made them more attractive, competitive, easy and popular. Include, for example, any associated infrastructure improvements within your control (such as changes in signage or lane markings).

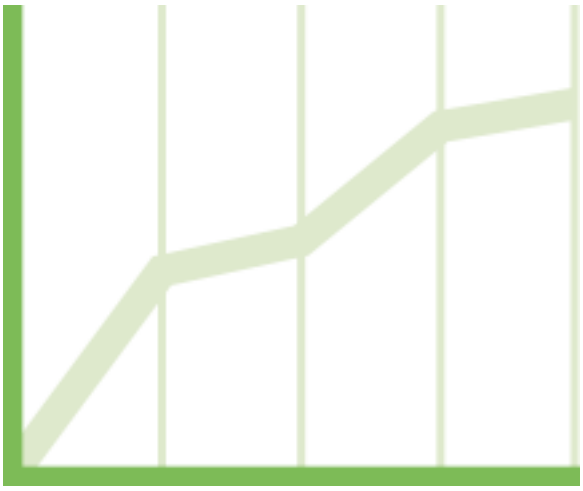
C. Outcome indicators

List the targets you set in chapter four.

D. Data collection methodology

For each indicator, describe what data you will collect, and how and when you will collect the information. If you can, collect mid-term (2-3 years) and long-term impact data, not just immediate results. Also ensure that you have some ways of monitoring outcomes (and/or other indicators of progress towards them) on an ongoing basis, so you know if you are on track.

Wherever possible, make use of control or comparison groups (randomly selected groups of people who did not participate in and were not exposed to your program). This helps filter out background changes and influences so that you can be more confident in measuring the changes that are actually a consequence of your program. A less reliable alternative is to simply compare travel behaviours before and after implementing your program.



If you can, collect mid-term (2-3 years) and longer-term impact data.

Timetable (Worksheet 8b)

Specify the tasks, people involved and deadlines to ensure effective and efficient implementation of your activities. Assign a competent and dedicated person to oversee each activity.

E. Establish baselines (see chapter four)

F. Finalize and pre-test the strategy (see chapters five and seven)

G. Expand existing and establish additional partnerships (see chapter six)

H. Pre-test messaging (see chapter seven)

I. Pilot test (see chapter seven)

J. Roll out to broader audience (see chapter eight)

K. Monitoring meetings (see chapter eight. Plan for review meetings to ensure you are staying on track.)

L. Evaluation milestones (see chapter eight. Set dates for more formal data collection, analysis and reporting.)

Budget (Worksheet 8c)

M. Revenues

Include all sources of revenue and in-kind contributions.

N. Expenses

Include all expenses, including staff time and overhead, outside expertise, research, pre-testing, pilot testing, monitoring, evaluation, promotion, taxes, and contingencies.

PRIMARY EXAMPLE – Case Study #2: GCC's Active and Safe Routes to School program

Here's how GCC's Active and Safe Routes to School program would have filled in Worksheets 8a, 8b and 8c, at the time it was launching its School Travel Planning initiative.

Worksheet 8a: Logic model and evaluation methodology

A. Inputs (budget, staff, volunteers, partner resources, anticipated infrastructure improvements beyond your control):

» National program lead and program manager

» Provincial coordinators / consultants

» Five schools (3 pilot and 2 control schools) in four provinces (20 in all)

» $434,000 funding over two years, for four provinces (see budget below)

B. Outputs:

Promotion: IWALK clubs, IWALK Days, and Winter Walk Days; walking school buses; in-school announcements, competitions, travel counts and recognition programs

Product, Price, Place: school-based program; neighbourhood walkabouts, school travel plans, and related infrastructure improvements; walking school buses; incentives, competitions and recognition for initial and more frequent participation

	C. Outcome indicators	D. Data collection methodology
Short term	Proportion of children walking and cycling to school	» Hands-up classroom surveys
Longer term	Proportion of children walking and cycling to school	» Hands-up classroom surveys » Family surveys

Worksheet 8b: Timetable

Typical Tasks	Dates	Person-in-charge
E. Establish baselines	» By October 2008	» Individual schools
F. Finalize and pre-test the strategy	» By October 2008	» GCC program lead and program manager
G. Establish partnerships	» By October 2008	» Individual schools
H. Pre-test DVD	» By December 2008	» GCC program lead and program manager
I. Pilot test	» By March 2009 (first four provinces)	» GCC program lead and program manager » Individual schools
J. Roll out to broader audience	» By March 2012 (six provinces and one territory)	» GCC program lead and program manager
K. Monitoring meetings	» Meetings every 4-8 weeks (via Skype, webinars, and teleconference)	» GCC program lead and program manager
L. Evaluation milestones	» March 2009 (first four provinces) » May 2011 and March 2012 (six provinces and one territory)	» Individual schools » Wrap-up by GCC program lead and program manager

Worksheet 8c: Budget

Budget over two years $343,000 as below ($85,750 for each of four provinces).
GCC staff and overhead came to an additional $91,000 over two years.

M. **Revenues**	$
Your organization	0
Funders and sponsors GCC	85,750
Partners (Each province to match GCC contribution)	30,000
Donations	0
Other	0
Total	115,750
N. **Expenses**	$
Management and staff - coordination, media and partner relations, selecting and working with suppliers and volunteers, Web site maintenance, etc. Provincial coordinator	100,000
Expertise and committees	0
Research, pre-testing, pilot-testing, monitoring and evaluation » Honorarium – all 5 schools » Detailed traffic counts at one of the 3 pilots » Incentives	 8,000 1,250 3,000
Infrastructure improvements	Local expense
Other strategy components, including communication / promotion expenses Material costs / photocopying	2,000

Other / Contingencies Attend two national face-to-face training and coordination meetings per year	1,500
Total	115,750

Program Impacts and Lessons Learned

At the pilot schools the mode share of active transportation (walking, walking part-way or biking) increased from 43.8% during the baseline measurements to 45.9% during the follow-up measurements. While this is a modest increase, it was seen as a significant step forward for the first year of implementation, particularly since all of the pilot schools had no previous experience with such programs. GCC's Active and Safe Routes to School program knew from previous work with other schools, that the mode shift would likely grow each year; in the past, schools with strong program champions and solid support from both the schools and their communities, had over time achieved 60% to 80% mode shares for active transportation.

According to the family follow-up survey, 13% of parents drove less as a result of participation in the pilot.

On the basis of the pilot organizers decided that in the next stage of program testing and rollout they would also pay each participating school $400 to cover data entry.

At the pilot schools, more children walked to school and their parents drove less.

Impacts From the Other Four Programs

#1: CFS's Employee Program: At Fondaction, in the first two years of the program, the modal share for single occupant vehicles decreased by 15%, from 72% of all trips to 57% of all trips; transit and carpool use increased correspondingly. The number of individual commuting by active transportation has tripled in summer time.

Carpool and transit use increased while use of active modes tripled in summer.

#3: University of Victoria's Travel Choices TDM program

TRANSPORTATION MODE	2004	2006	2008
SOV	47%	44.1%	37.5%
Carpooling (2 or more people)	11.8%	11.9%	12.7%
Transit	26%	27.4%	31%
Cycling	6%	5.3%	7.1%
Walking	9%	11.2%	11.2%
Skateboarding	0.2%	0.1%	0.3%

There was a 20% modal shift away from SOV driving since 1996, even while the campus population continued to grow.

Purchasing an employee bus pass at the University of Victoria.

#4: Winnipeg's WinSmart Showcase

Community-Based Travel Marketing pilot: This portion of the showcase resulted in an 11.7% reduction in drive-alone mode share and an 18.2% reduction in CO2 emissions for participants' household trips. The number of vehicle kilometres travelled also decreased by 5.4%. There was a 54.3% relative increase in cycling, a 3.4% increase in walking and an 8% increase in carpooling. Transit use declined by 7.8%, which was attributed in part to the fact that the majority (60%) of people who reported using transit in the baseline survey switched to an active mode in the follow-up survey.

Park and Ride: Had the new park and ride facility not been available, 43% of those surveyed would have used a motor vehicle to commute to work, 45% would have used an alternative transit route, 6.9% would have used a combination of modes, and 5% would have used active transportation or some other form of transportation.

Real-time electronic bus departure displays: Of transit user surveyed, 44.8% said that they would take at least one more trip per week specifically because of the addition of the displays.

Active transportation path: Of trail users surveyed, 14% said they would have used their car for transportation had the new path not been available, 12% would have used transit, 45% and 22% would have cycled and walked

using another route, and 6% would have used a combination of modes.

WinSmart's Community-Based Travel Marketing pilot observed a 54% relative increase in cycling among program participants. Photo by Nils Vik.

#5: Whitehorse Moves: 10% increase in the number of households that had at least one member of the household walk or cycle downtown. In addition, downtown commuters increased their frequency of cycling and walking (between April and October).

In Whitehorse, downtown commuters increased their frequency of cycling and walking between April and October.

Piece Together Your Social Marketing Plan

This chapter contains blank copies of all worksheets, for your convenience. Photocopy or print them as needed.

Worksheet 1: Form a planning team

A. Planning team members
B. Other stakeholders. Who are they and how and when will you consult them?
C. Schedule the first two to three planning team meetings
D. Terms of Reference. Who will prepare this and by what date will it be done?

Worksheet 2a: Focus and rationale

A. Main issues:
B. Why you, why now?
C. Financial limitations:

Worksheet 2b: Behaviors and audiences

D. Transportation behaviours List them below:	E. Primary audiences	F. Secondary audiences (who are they and what do you want them to do)?	

Worksheet 3a: Audience analysis and segmentation

A. Audience:		
B. Travel Behaviour: What you want them to do?		
	Those who have adopted the behaviour	Those who have *not*
C. Demographic data		
D. Benefits and incentives: Why are/would they do the behaviour? Will incentives be required to engage this audience? If so – what kind of incentives?		
E. Barriers: Why would they stop / aren't they? Which barriers have the greatest impact and which ones can you influence most cost-effectively?		
F. Influencers: Who has an influence on them?		
G. What do they perceive the norm to be? Have most people like them adopted the behaviour?		
H. Media habits and channels of communications		

I. Membership in groups, and events and places where they can be reached		
J. Segmentation: Among those who have not yet adopted the behaviour, can you identify specific segments that are more receptive than others? More successful at adopting the new behaviour? More likely to maintain it? On what basis (elimination of barriers, possible benefits, and/or demographics)?		
K. Key moments: When are your audiences most likely to try and adopt the desired and competing travel behaviours?		
L. Missing information: Which research methods will you use to gather the necessary information to make strategic decisions?		

Worksheet 3b: Opportunities and Challenges

M. Competition: With what and/or whom are you competing for your audience's attention?

Should you compete with or join your competitors?

N. Community Support: Is the community or setting generally supportive and ready or not?

O. Other Opportunities and Challenges: Are there legal, political, social, environmental, economic, business, technological, ethical or any other considerations and events that represent an opportunity or challenge?

Opportunities

Challenges

Worksheet 4: Objectives

Audience/Segment	A. Indicators	B. Baseline	C. Target	Target Date

Worksheet 5: Develop the strategy

A. Barriers / Price and Place: What are the most important barriers that discourage your target segments from adopting the desired travel behaviour? Which ones can you reduce and how will you do that? Will you need to introduce incentives or disincentives?

A. (continued) Where and when will your audience initiate the action or access the service being promoted? What facilities, systems, times and other factors can make the desired transportation options more convenient and pleasant?

B. Product: How can you improve on your product? How are you going to make the desired travel choice more attractive, competitive and popular?

C. Positioning and branding: How do you want the audience to see the desired behaviour and your initiative or organization? Will you use some elements (e.g., name, slogan, terms, packaging, graphic and/or sound elements) to brand the behaviour or your initiative?

Continued…

D. Additional Tools of Change: How and when will you prompt people to do the behaviour? How will you build motivation and reinforce the behaviour over time? For example, how and when will you ask for commitments, raise the visibility of participation (norm appeal) and provide feedback and recognition?

E. Promotion – messaging: What messages will you convey? Will they highlight benefits, norms or influential individuals, promote ways to overcome barriers and/or include specific calls to action?

F. Promotion – channels: What combination of interpersonal channels (e.g., word-of-mouth, home visits, events, workplace and school place programs) will you select to convey your messages? What combination of other media channels will you select to convey your messages?

Worksheet 6: Establish partnerships

A. Needs Sought:				
B. Possible organizations	C. OK?	D. Nature and scope of contribution	E. Benefits to them	F. Notes

Worksheet 7a: Pre-testing

A. Purpose and Timing (What do you want to learn? When should you carry out the pre-test(s)?
B. Participants (Which segments of your audience do you want to include and exclude in testing?)
C. Method:
D. Questions:

Worksheet 7b: Pilot testing

E. Participants
F. Evaluation Method
G. Data to Collect

Worksheet 8a: Logic model and evaluation methodology

A. Inputs (budget, staff, volunteers, partner resources, anticipated infrastructure improvements beyond your control):		
B. Outputs:		
Promotion:		
Product, Price, Place:		
	C. Outcome indicators	D. Data collection methodology
Short term		
Longer term		

Worksheet 8b: Timetable

Typical Tasks	**Dates**	**Person-in-charge**
E. Establish baselines		
F. Finalize and pre-test the strategy		
G. Establish partnerships		
H. Pre-test DVD		
I. Pilot test		
J. Roll out to broader audience		
K. Monitoring meetings		
L. Evaluation milestones		

Worksheet 8c: Budget

M. **Revenues**	$
Your organization	$
Funders and sponsors	$
Partners	$
Donations	$
Other	$
Total	$
N. **Expenses**	
Management and staff - coordination, media and partner relations, selecting and working with suppliers and volunteers, Web site maintenance, etc.	$
Research, pre-testing, pilot-testing, monitoring and evaluation	$
Infrastructure improvements	$
Other strategy components, including communication / promotion expenses	$
Other / Contingencies	$
Total	$

Resources

(1) Form a planning team

Online

Transport Canada (2010). *Workplace Travel Plans*. Provides details about TMAs and other potential team members focused on workplace TDM. http://www.tc.gc.ca/eng/programs/environment-urban-menu-eng-1682.htm

Print

Lagarde, F. (2004). The challenge of bilingualism – ParticipACTION campaigns succeeded in two languages. *Canadian Journal of Public Health, 95* (Suppl. 2), S30-S32. Examines the factors associated with successful bilingual campaigns, including the need to involve skilled English and French staff and suppliers at every step of the creative development and production process.

Lagarde, F. (2009). What if your organization couldn't care less about social marketing*? Social Marketing Quarterly, 15*(2), 105-108. Describes challenges and opportunities when introducing social marketing practices to organizations.

(2) Determine focus, behaviours and audiences

Online

Transport Canada (2009). *Compendium of Canadian survey research on consumer attitudes and behavioural influences affecting sustainable transportation*. Provides an overview of recent Canadian research findings, including barriers and benefits, and identifies sources for locating this type of information http://www.tc.gc.ca/eng/programs/environment-urban-menu-eng-2084.htm

Print

Lagarde, F. (2006). Le marketing social. In G. Carroll (ed.), *Pratiques en santé communautaire* (pp. 99-112). Montreal: Chenelière Éducation. One of the few social marketing resources available in French, this book chapter provides a succinct yet comprehensive review of social marketing principles and planning steps along with ethical considerations.

Möser, G. & Bamberg, S. (2008). The effectiveness of soft transport policy measures: A critical assessment and meta-analysis of empirical evidence. *Journal of Environmental Psychology, 28*, 10-26. Provides an extensive review of studies evaluating three types of soft transport policy measures including travel planning, public transport marketing, and travel awareness campaigns.

Reynolds, L. & Merritt, R. (2010). Scoping. In J. French, et al. (2010). *Social marketing and public health: Theory and practice* (pp. 161-191). Oxford University Press. Provides systematic recommendations on how to conduct the initial and formative steps in planning a social marketing project.

(3) Gather information

Online

ACT Canada and Noxon Associates Ltd. (2009*) Workplace travel plans: Guidance for Canadian employers.* (pp. 22-26 - Tools for Gathering and Analyzing Information). Transport Canada. The comments on surveys, counts, consultations (focus groups and open houses) and key indicators (like modal share and emissions) are helpful even for programs that are not work-based. http://www.tc.gc.ca/eng/programs/environment-urban-menu-eng-1682.htm

Kassirer, Jay. *Tools of change: Proven methods for promoting health, safety and environmental citizenship*. The site's detailed case studies of North American travel behaviour programs and its listings of resources for researching such programs can be accessed directly at http://toolsofchange.com/en/topic-resources/transportation/

McKenzie-Mohr, D. *Fostering sustainable behaviour: Community-based social marketing*. The site's collection of transportation articles, case studies and forums can be accessed directly at the bottom of the home page. www.cbsm.com

Transport Canada (2009). *Compendium of Canadian survey research on consumer attitudes and behavioural influences affecting sustainable transportation*. Provides an overview of recent Canadian research findings, including barriers and benefits, and identifies sources for locating this type of information. http://www.tc.gc.ca/eng/programs/environment-urban-menu-eng-2084.htm

Print

Andreasen, A.R. (2002). *Marketing research that won't break the bank.* San Francisco: Jossey-Bass Publishers.

Kotler, P. & Lee, N.R. (2008). *Social marketing: Influencing behaviours for good* (pp. 96-115). Thousand Oaks, CA: Sage. This comprehensive and practical textbook is used widely worldwide. The specific section on conducting a situational analysis will be particularly useful at this stage of the planning process.

Lagarde, F. (2004). Worksheets to introduce some basic concepts of social marketing practices. *Social Marketing Quarterly*, *10*(1), 36-41. Introduces some earlier versions of the worksheets used in this guide along with suggestions for completing them and lessons learned.

Maibach, E.W. (2002). Explicating social marketing: What is it, and what isn't it*? Social Marketing Quarterly*, *8*(4), 6-13. Provides an overview of key elements of social marketing practice that differentiate it from educational approaches.

McKenzie-Mohr, D. & Smith, W. (1999). *Fostering sustainable behaviour*. Gabriola Island, BC: New Society Publishers. The classic text on community-based social marketing.

Myers, J.H. (1996). *Segmentation and positioning for strategic marketing decisions.* American Marketing Association.

(4) Set objectives

Online

Environment Canada. *EcoAction Community Funding Program – Funding resource guide (Section on Objectives).* www.ec.gc.ca/ecoaction/default.asp?lang=En&n=D10BC75F-1#at_a_glance

Health Canada. *Social marketing e-learning tool – Section 3: Setting objectives.* www.hc-sc.gc.ca/ahc-asc/activit/marketsoc/tools-outils/_sec3/index-eng.php

Kassirer, Jay. *Tools of change: Proven methods for promoting health, safety and environmental citizenshi*p. Contains case studies showing what others have achieved. www.toolsofchange.com

McKenzie-Mohr, D. *Fostering Sustainable Behaviour: Community-Based Social Marketing.* Contains case studies of what others have achieved. www.cbsm.com

Transport Canada (2009). *Canadian Guidelines for the Measurement of TDM Initiatives: User's Guide.* www.tc.gc.ca/eng/programs/environment-urban-guidelines-practitioners-tdmguide2009-menu-1657.htm

Print

Myers, J.H. (1996). *Segmentation and positioning for strategic marketing decisions.* American Marketing Association. Describes segmentation methods in detail.

(5) Develop the strategy

Online

ACT Canada and Noxon Associates Ltd. (2009). *Workplace travel plans: Guidance for Canadian employers* (pp. 22-26 - Tools for Gathering and Analyzing Information). Transport Canada. Outlines nine groups of strategy measures for workplaces. http://www.tc.gc.ca/eng/programs/environment-urban-menu-eng-1682.htm

Calstart (2009). *A Compendium of Sustainable Community Transportation Strategies.* http://www.calstart.org/Libraries/First_Mile_Documents/Compendium_of_Sustainable_Community_Transportation_Strategies.sflb.ashx

Kassirer, Jay. *Tools of change: Proven methods for promoting health, safety and environmental Citizenship.* The site's detailed case studies of Canadian and American travel behaviour programs can be accessed directly at http://toolsofchange.com/en/topic-resources/transportation/.

McKenzie-Mohr, D. *Fostering sustainable behaviour: Community-based social marketing*. The site's collection of transportation articles, case studies, strategies and forums can be accessed directly at the bottom of the home page. www.cbsm.com

National Cancer Institute. *Making health communication programs work.* Outlines the basic planning steps that can help make any communication program work, regardless of size, topic, geographic span, intended audience, or budget. http://cancer.gov/pinkbook/page5

Ogilvie, D. et al. (2007). Interventions to promote walking: systematic review. *BMJ, 334,* 1204. www.bmj.com/cgi/content/full/334/7605/1204

The Health Communication Unit. *Select communication channels and vehicles.* Provides a list of key selection considerations for and detailed menus of possible communication channels. http://www.thcu.ca/infoandresources/publications/StepSixSelectChannelsVehiclesForWebOct9-03.pdf

Victoria Transport Policy Institute. *Online TDM encyclopedia.* Reviews a range of transportation demand management strategies. www.vtpi.org

Print

Hastings, G. (2007). *Social Marketing: Why should the devil have all the best tunes?* Butterworth Heinemann. (See Chapter 4: Opening the Toolbox, pp. 59-79). Contains practical steps and tips for strategy development.

Hornik, R.C. (2002). Exposure: Theory and evidence about all the ways it matters. *Social Marketing Quarterly, 8*(3), 30-37. Demonstrates the need to devise a strategy for obtaining enough exposure to messages, through multiple channels, over time.

Kaplan, A.M., & Haenlein, M. (2010). Users of the world, unite! The challenges and opportunities of social media. *Business Horizons, 53*, 59-68. Describes the concept of social media and provides a classification of possible applications.

McKenzie-Mohr, D. & Smith, W. (1999). *Fostering sustainable behaviour*. Gabriola Island,

BC: New Society Publishers. The classic text on community-based social marketing.

Mintz, J.H., & Chan, J. (2009). *Guide to branding in the public and not-for-profit sectors.* Ottawa, Ontario: Centre of Excellence for Public Sector Marketing.

(6) Form Partnerships

Online

Colterman, B. (2008). *Elements of effective partnering*, and *Using objectives to simplify your approach towards partners and sponsors.* http://berniecolterman.wordpress.com/2008/08 and http://berniecolterman.wordpress.com/2008/03

Print

French, J. (2010). Partnerships in social marketing. In J. French, et al. (eds.), *Social marketing and public health: Theory and practice* (pp. 301-317). Oxford University Press. Advises how to select appropriate partners and develop a partnership management system.

Kotler, P. & Lee, N. (2005). *Corporate social responsibility.* John Wiley & Sons. Provides insight on ways corporations are approaching their contributions to social issues.

(7) Pre-test and pilot test

Online

Centre for Disease Control. *Social marketing for nutrition and physical activity* web course (Start at www.cdc.gov/nccdphp/dnpa/socialmarketing/training/phase4/pretesting.htm and click on the "next" button at the bottom right to continue).

McKenzie-Mohr, D. *Fostering Sustainable Behaviour: Community-based social marketing.* www.cbsm.com

National Cancer Institute. *Pink book – Making health communication programs work.* (See Stage Two "Developing and Pretesting Concepts, Messages and Materials") http://www.cancer.gov/pinkbook/page6

Print

Siegel, M. and Doner, L. (2007). *Marketing public health: Strategies to promote social change* (2nd ed.). Sudbury, Massachusetts: Jones and Bartlett Publishers. Covers all aspects of planning, implementing and evaluating public health initiatives.

(8) Implement and improve continuously

Online

Transport Canada. (2009). *Canadian Guidelines for the Measurement of TDM Initiatives: User's Guide.* www.tc.gc.ca/eng/programs/environment-urban-guidelines-practitioners-tdmguide2009-menu-1657.htm

University of Wisconsin Extension, Program Development and Evaluation Unit. *Logic Models*. Demonstrates how to construct a logic model showing the intended relationships between investments and results. www.uwex.edu/ces/pdande/evaluation/evallogicmodel.html#more

Appendix

Channels of Communication[30]

The following is a list of channels of communication to consider.

Interpersonal Interaction

- Word-of-mouth
- Presentations (in settings identified in your audience analysis)
- Association and club meetings and activities
- Courses / training sessions
- School-based lessons / curriculum
- Workplace activities and meetings
- Social media (e.g. Facebook and Twitter)

Events (these can involve interpersonal interactions and/or media at the events)

- Family events / gatherings
- Community events / gatherings
- Sport and artistic events
- Conferences
- Contests
- Fairs
- Fund-raisers
- Rallies
- Awards ceremonies

Ensure that events will effectively reach the intended audience. It may be more cost-effective to work within an existing and successful event to attract your audience, rather than organizing your own.

Media

- Direct mail: brochures, generic letters, tailored letters, trial offers, kits, etc.
- Displays
- Magazines: articles, ads
- Newspaper: commentaries, letters to the editor, news coverage, supplements, advertisements
- Online world[31]: e-mail (tailored or generic), web sites, advertisements, blogs

[30] Adapted from The Health Communication Unit – University of Toronto and other sources (see Recommended Readings.)

[31] Web sites are increasingly becoming an important component of social marketing promotion. Visitors are information-seekers, who are already receptive to your product or service. You should therefore provide how-to information, not just general motivational messages. Your Web site URL should be given high visibility in all materials and activities, and should include a name that is easy to remember. Be sure the Web site is attractive, easy to navigate, fast to download, interactive, with reasons for future visits and is consistent with all other campaign materials.

- Other print media: brochures, booklets, flyers, paycheck stuffers, newsletters, comics/stories, newsletter articles, newsletter ads, posters, other print ads
- Outdoor: billboards, signage, transit shelter ads, bus ads, streetcar ads
- Phone: direct calling with message, hotline (live), info-line (taped message)
- Point of purchase: brochures / other print materials, demonstrations, displays, posters, videos, audio recordings, information booths
- Promotional items: fridge magnets, hats, buttons, bags, pens, pencils, stress balls, bracelets
- Radio: Community announcements, advertisement, phone-in shows, news coverage, guest speakers, editorials / commentaries
- Television: community channel text ads / messages, documentaries / extended educational pieces, news coverage, programming, advertisements
- Movie: product placement, programming

If you consider using the mass media to communicate your message, determine which approach to take:

Generating publicity is the most realistic approach to gaining visibility in the media. Getting coverage comes from personal media contacts, pitching stories to the right people in the media, preparing for interviews and selecting spokespeople including celebrities. This may require training the spokespeople, organizing news conferences and briefings.[32]

Paid advertising or unpaid public service announcements can be a powerful means of communication, but are also expensive and it can be difficult to ensure ongoing exposure. If you rely on free airtime (e.g. PSAs), confirm placement before spending any money on production. You may want to hire a media placement consultant or agency (perhaps the same one that is developing your messages) to maximize your resources by selecting the right media with the optimal frequency and duration to reach your audience and achieve your objectives.

[32] Bonk, K., Griggs, H. & Tynes, E. (1999). *Strategic communications for nonprofits.* San Francisco, CA: Jossey Bass.