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Increasing Public Transport Demand by Active Mobility Consultancy Campaigns (SMARTMOVE)

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## Increasing Public Transport Demand by Active Mobility Consultancy Campaigns (SMARTMOVE)

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#### **Abstract**

Within the European project SmartMove "Active Mobility Consultancy" (AMC) campaigns for public transport lines and their feeder systems in eight European case study areas are implemented. Active Mobility Consultancy campaigns aim at promoting the use of public transport via personalised travel marketing approach in order to increase the demand and therefore the efficiency for existing public transport supply in a specific region. Hypothesis of the project is based on the fact, modifications and improvements in the public transport supply on smaller scale are frequently carried out, but the information transfer to potential users on these changes is less developed. Therefore the potential demand effect of such measures may be too low. Especially for non-users the gap of information how to use public transport and the barrier to use public transport increases.

Active Mobility Consultancy refers to the active process of informing people on public transport: it is not public transport users, who have to inform themselves about public transport services; rather the public transport operators that have to inform their (current and potential) customers according to their individual needs. For this purpose, current and potential public transport users are contacted to provide them with demand based information via different communication channels such as public events, questions & answer meetings, telephone contacts or mail based communication. (Potential) users will receive individualised information adapted to their individual needs answering the questions, e. g.: (1) Where is and how to get to the next stop? (2) Which tickets of public transport are available and how I get these at the ticket vending machines or elsewhere? (3) Which ticket is appropriate for my mobility needs and how much one need to pay in comparison to the car usage? (4) Where do I receive further information about the time table? (5) Which electronic information channels are available to get e. g. online data on departures of vehicles at stations?

The SmartMove project addresses key action on energy-efficient transport of the Intelligent Energy Europe programme (STEER). In line with the Transport White Paper it focuses on passenger transport and gives particular emphasis to the reduction of transport energy use. The project started in February 2014; fieldwork will be carried out in spring 2015. A promising pilot project was carried out already in 2012 where up to 12% additional passengers could be recognised at the bus lines along the campaign.

**Keywords:** Efficient public transport, individual information, mode shift

#### Introduction

Public transport (PT) in rural areas is facing tremendous challenges: on the one hand the demographic dynamics of ageing and shrinking societies have particularly impacts on peripheral regions with PT revenues often depending on (decreasing) transport demand. On the other hand, two key factors for the attractiveness of public transport - the PT stop density and the level of service frequency - are often of insufficient quality. Thus, there is a need for the development of effective feeder systems to PT stops and for the adaptation of the scarce PT resources to user needs. However, even if sufficient rural PT systems are available, large parts of the population have diverse subjective barriers to use PT. This is even more relevant for PT feeder systems: in many cases citizens are not even aware of their existence or, if they are aware of them, there are subjective barriers to use them.

These problems will be addressed within the EU funded SmartMove project by implementing "active mobility consultancy" (AMC)-campaigns for PT lines and their feeder systems in eight rural and peripheral areas. The project aims at promoting the use of PT via personalised travel marketing approach. The 'active' in active mobility consultancy has a twofold meaning. On the one hand, it refers to the active process of informing people on PT: it is not PT users, who have to inform themselves about PT services; rather the PT operators have to inform their (potential) customers according to their individual needs. For this purpose, current and potential PT users are contacted to provide them with demand based information via different communication channels. The success of this approach has been proven in several studies (Cairns et al., 2004). The second meaning refers to several active measures aiming on decreasing subjective barriers to the use of rural PT systems and its feeders - AMCs are more than a purely information provision: active measures will be offered in addition to the written information and the consultancy talks that are usually applied in similar campaigns. This might include actions like practical traveller trainings, citizen participation in planning or guided tours for PT feeder schemes.

The AMC-campaign applied within the project was already successfully implemented for an interregional rapid transit bus system in Austria. It was further developed within the project, taking into account experiences of SmartMove partners and adapted to the specific needs of the implementation areas in different European regions (SMARTMOVE consortium, 2014-1).

The steps of the AMC campaigns undertaken in SmartMove can be segregated into 6 phases (DIALOG consortium, 2012):

- (1)Preparation phase
- (2)General contact phase of target persons
- (3)Segmentation phase: Identifying the information needs
- (4)Individualised contact phase: Send the service form
- (5)Delivering phase: Hand over the service packages and "thank you presents"
- (6) Consulting phase

#### **Preparation Phase**

In the first instance, it is important to define the objective of your marketing campaign, in the project SmartMove i.e. the AMC campaigns are focussing on public transport systems in rural areas including its feeder systems. Thus, the backbones of the public transport system of the region need to be identified as well as possible feeder systems and accompanying active measures are to be analysed. The decision which accompanying active measure should be implemented depends on time and financial resources. It has to be decided if a certain target group or every citizen is addressed. Concentrating on a certain target group (for example: elderly people, young people, students, people with changes in their place of residence, tourists) could be an advantage as the information materials and accompanying active measures can be designed to the specific needs of the target group envisaged. The AMC campaign aims to contribute to environmental protection. Therefore, it is appropriate to ask for support concerning co-finances and conceptual involvement at diverse stakeholders. The project idea and details of the implementation area and the effected lines should be discussed with representative of the public transport organisations, the provincial and local government, as well as public transport operators and mobility managers. The aim is to agree on particular lines of interests and to achieve a common ownership on the implementation of the AMC campaign in a particular region. Depending on their field of work the support of stakeholders can be manifold, e.g. by providing information material or supporting the contact and delivering phase.

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

- How many persons should be addressed? Some tasks are mostly independent of the number of participants, for example the development of a concept or the collection of information to be used in the campaign. Other tasks like printing material, sending of material, answering of phone queries or individual consulting require more resources with every additional person to be included in the campaign.
- How the individualised contact and delivery phase is designed? By contacting the target persons by telephone, a higher participate rate can be reached and motivation to change behaviour might be increased. However, for this more resources are needed indeed. Moreover, it might cause some legal problems in some countries.
- If you want to offer personal consultation, you can manage this with your own staff, assuming that enough personnel capacities are available. Also the use of external providers is possible (e.g. a mobility agency), which has to be organized in advance.

In order to define the target group and the number of persons being addressed (also dependent on the financial resources available), lists are prepared with the addresses of the target persons. Contacts to the local government established could support the access to these data. Experiences show, that about one fourth of all households is not available as data may be outdated or wrong. In addition about one fourth -and even more- is not interested in participating dialogue marketing. On the basis of already implemented projects concerning dialogue marketing a measured value of success could be determined, e.g. if about 30% of all contacted persons reply and the further communication can be maintained, the campaign can be regarded as successful. Existing information material should be available in a sufficient number and includes materials of other information providers as well. If no information material is available, which suites to the topic of the AMC campaign, it has to be created for the campaign. In such a case, a professional and attractive design and layout has to be ensured. Sometimes, providers of information material are also providing giveaways which can be used as "thank you presents". However, a sufficient number must be ensured, so that they are available during the whole campaign and can be delivered without any delay. The numbers of information material and of the "thank you presents" can be calculated based on the number of participants and the attractiveness of the information material. For calculating the required materials and the number of "thank you presents" one can use a rough formula based on empirical experiences. Approximately, a participation rate of 40% of all persons targeted in the campaign can be assumed, of which about each 2nd to 3rd participant orders information material, depending on the quality of the material. This means, if 1.000 target persons are contacted (gross), 150 to 200 editions of the information materials are usually needed (Link et al., 2013). If budget is limited, the number of "thank you presents" can be limited in order to reduce the project cost. Either by the regimentation that only one "thank you present" can be selected by each target person or by a first come first serve selection.

As already stated above, it need to be clarified if own staff organises the campaign or employees of an external provider need to be engaged and who take over (part of) the costs. In the latter case, the provider has to be contacted at an early stage clarifying interfaces of the cooperation. However, possibly external assistances might need additional workplaces. Please note that for all telephone contacts sufficient quiet workplaces should be available. Working documents like a contact lists, contact forms, writing material, contact details of supervisors in case of problems etc. should always be at hand. All notes, which were made during the telephone contacts, should be integrated into a database immediately. To make sure that the AMC campaign is successful, all internal and external employees should be trained to increase the quality of the contacts with the target persons. Coordination, training of employees and the allocation of competencies are indispensable. Only trained employees can solve deficits of information of target persons immediately. This is an important success factor to reach the objective of the campaign: the ad hoc provision of information and overcoming information deficits. All staff involved should know the overall road map, the objectives and the relevance of campaign by heart. The staff must be able to answer frequently asked questions. Conversations should be trained by role plays in advance. Moreover, the staff has to be trained how to establish contacts to the target persons as well. All employees should know the information required from the target persons (to proceed with the campaign) very well and can manage the database, when they type in the status of the contact. Local media and other multipliers have to be identified and contacts need to be established at an early stage. A press release should be published at the beginning and in parallel with the campaign in order to tell "stories of success".

#### **General Contact Phase**

In the general contact phase the target persons are accessed by mail and all main information about the campaign is given. Although the response rate might increase by contacting target persons firstly by phone, it might cause legal problems in some countries, as people are contacted they have not asked for and the campaign is not related to market research only. For this reason, it is recommended at first to send an initial letter to inform about the campaign launched in the region. The main objectives and the process should be described shortly within one page at maximum. An invitation for participation has to be included as well. The initial letter could look like as shown below, translated from a practice example in Austria (Figure 1; AMC-Waldviertel Line, 2011). The willingness for participation is increased

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

A project contact person should be named on the cover letter and a phone number and the time should be given, when this contact person is available for any questions. Phone calls beyond the time should be recorded and be answered later. The contact person need to be able to answer all questions concerning the objective and the process of the campaign and should have access to the database documenting the communication between the project team and the target persons. On a separate postcard to be included in the initial letter, the target persons can express their willingness to participate. The effort to respond for the target persons need to be as low as possible. The postage should be paid by the addressee. By naming the phone number and sending the postcard, the target person agrees to the participation. The postcard should be printed and can look like the following illustration, translated from an Austrian practice example (Figure 2; Dialog, 2012).

**Figure 1.** An Example of an Initial Letter for the AMC Campaign





An initiative of The province of Niederösterreich In cooperation with

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

E-Mail: waldviertellinie@boku.ac.at Telephone: 01-466837-5300 Mo to Fr 10 to 16 hours

St. Pölten, May 2014

To John Example High street 24 3738 Oldnailsmountain

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

Dear John Example

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

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

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

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

Kind regards

John Fast Province of Niederösterreich Head of department of Transport Michael Goodwill University Bodenkultur Project manager

Logo of Wellville Project DIALOG Climate protection within mobility and household energy Dear citicens of Wellville The town of Wellville caries out a dialogue marketing campaign aiming at potential of energy consumption savings in the field of mobility and in your flat. We welcome your willingness to participate and ask you to send uscontact details, so that we can include you in the furtehr service activities. The postage will be paid by the project! You need to fill in the back page only and return the postcard to us via surface mail. All your contact details and further personal information will be treated confidentially considering the national privacy standards and will not be transferred to any third party. We appreciate your participation! YES, I will participate in the Postage paid by dialogue marketing campaign for energy consumption savings. My Name: To Wellville Town office My Phone number: Lucy Sky Market square 1 1234 Wellville Do you have any questions? Please contact Lucy Sky by calling 0123/12345 - 12 daily from 9 to 10 hours at your disposal.

Figure 2. An Example of a Return Post Card for the AMC Campaign

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

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

For each target person a separate questionnaire is needed. The specific address and the name of the target person, the date of contact and all given answers are noted on the questionnaire and entered in the communication database afterwards. It is recommended to prepare a computer-based input

mask, which includes all further tasks. The answers of the target person and all information concerning the participant are documented in the communication database. This includes information towards the address, the status of this person with regard to the next steps of the campaign as well as further information to be used for evaluation. The information of the status concerns the participation of the target person, which can be e.g. "not interested, excluded", "interested, need to be contacted", "information to be sent", "information sent, process accomplished". This means, it includes information, whether the participant takes part or not and when the last date of contact to the person was. Several further information need to be documented, which has been collected during the calls. This could be, for example, how the current mobility behaviour looks like or which information materials they should or have received already.

#### **Segmentation Phase**

Based on the identified data within the mail contact and the telephone contact, the respondents are divided into four groups, see Table 1.

**Table 1.** Identification of Respondent Groups

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

The idea to send persons, who are using public transport already, a "thank you present" and a motivation letter, is to encourage them in their current mobility behaviour. Furthermore, sometimes these persons either see their behaviour as nothing very special or they suffer on the fact their sometimes altruistic behaviour is not recognized at all by the society. The person can chose one "thank you present" out of a list with several opportunities. Ideally, the "thank you presents" should be specific for the topic and useful. For example mobility related presents can be city maps, pocket lights, USB-sticks, pocket umbrellas, free entry tickets for museums or exhibitions within the region or a reduction on or a free bike rental (e.g. electric bikes).

#### **Individualised Contact Phase**

Persons who need information receive a service form by surface mail. In this form, several information materials concerning the topic are listed to be selected by the target person. The participants can choose all information materials on this form they are interested in. The information material consists of existing information material and tailor-made information according to the individual person's needs (which are specified by the respondent on the service form). In order to save costs it is recommended to use existing information material as much as possible, e.g. material of other information providers or companies: Are there any relevant materials of regional or national institution on this topic available? Which complement materials can also be relevant for the target group? The focus should be widely and open. Information about walking and cycling can be expanded over the element of feeder transport to the public transport stop. The following illustration shows an example of a service form with an offer of existing brochures and leaflets used in the Waldviertel pilot study in Austria (Figure 3; AMC-Waldviertel Line, 2011).

**Figure 3.** An Example of an Order Form for the AMC Campaign (A4 Landscape, Double Sided)

free weekly test ticket		Service action for
You can have test rides on all lines . As long as stocks last !		WALDVIERTEL-LINIE
O Please choose one of the presents O- offered below as a thank you for your participation! please put in the number "1" in your favourite present and chose another items, where you put "2"		EINSTEIGEN. UMSTEIGEN.
pocket umbrella pocket light		Something is going on in the Waldviertel You can participate – and benefit!  Please tick the box of your required items! An envelope for your answer is included (p ostage paid)!
travel set		All divelope for your answer is included (p ostage para).
insulated mug		
O To which address the material should be delivered ? same address as this form was sent	•	
following address:   NAME:  ADDRESS:		an initiative by

O Regional pocket timetable all lines and courses of the region Gmünd Zwettl Gföhl Horn Waidhofen Pöggstall  O Time table for a specific Waldviertel-line please select your preferred line WA 1 Gmünd – Zwettl – Krems/Donau and vice versa including connected lines to and from Vienna and Horn  WA 23 Horn - Rastenfeld and vice versa	O Ticket- und fare information  Where to buy? Which type of tickets? Fare structure examples  On your request we compare your individual cost for a tpical way for you (Comparison of cost between car and public transport):  from
Public transport map of the Waldviertel Region all trains and buses included  Public transport stop information of all departures and arrivals at your desired stop Please fill in an address and we will send to you the information for the closest stop or fill in a concrete name of a public transport stop:	Car type  O Leisure activities OUt door activities Waldviertel hiking paths , excursions with your bicycle, etc.  Travelling to the neighbours (Czeck Republic) public transport supply Waldviertel - Southern Bohemia
qando - free time table information for your smart phone a guideline how to install and use  Leaflet "Mobility agency Waldviertel"  An overview of services provided and contact details	o Individual time table oa time table for your desired route  Monday - Friday Saturday Sundays / Bank holidays  from:  (public transport stop or address)  to:  (public transport stop or address)  Outbound: hours Inbpund: hours

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

- Individualised time tables: Time tables of all lines, which stop nearby the desired address. Eventually including a description, how to access the stop (e.g. route information for walking including average walking time, distance).
- Individualised travel plans: If information in detail about desired trips (origin, destination and desired departure or arrival time) is reported by the target person, public transport information for this trip can be provided.
- Comparative calculations: Compare the consequences of using public transport instead of using the car. Comparative categories could be the effects on environment (CO<sub>2</sub>-emissions), travel cost and/or travel time. Calculation can be based on single trips or better on the annual basis (as usually a higher frequency of usage reduces the cost for public transport because of the option to calculate based on a season ticket).
- Information about additional active measures organised in the region, e.g. pedelec-try-out days (including the possibility of registration).

Personal information materials have two advantages in comparison to general advertisement materials: Many persons do not trust general example calculations. Calculations based on individual framework conditions including the description of personal advantages have much more power of persuasion. By showing interests towards the specific personal situation, it is indicated that the individual needs of the target person is important. Thereby you can motivate people more effectively to behavioural changes. In addition to the general and the personal information materials to be selected, an appointment for consulting can be offered on the service form. A little "thank you present" can be an incentive for taking part and returning the service form. The service form is returned by the target person, but the postage should be paid by the addressee. If there is no answer within three weeks, a reminder-call should be made. It is important, that all information materials should be adjusted on the target groups' needs. Changes in travel behaviour can only be achieved by providing information material, which is informative, short and precisely. Empirical values show, that the design of information materials is very important. The professional design and the high quality of information materials are indeed very expensive, but guarantees success. After receiving the service forms containing the "orders", the individualised service package for each participant need to be prepared. They usually include the general information materials, the individualised information, an appointment for consultancy if requested (and offered within the campaign) and the "thank you present" selected by the target person.

#### **Delivering Phase**

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

#### **Consulting Phase**

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

#### **Evaluation Phase**

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

#### A Case Study Experience in Austria

The Waldviertel-Linie is a high-quality public transport service providing mobility access for Austria's Waldviertel region. It has been in operation since

2009, but initially attracted relatively modest additional passenger numbers. Therefore the public transport provider organised an active mobility consultancy (AMC) campaign in order to maintain relations with existing passengers, to attract new ones, and to collect feedback about the services. The campaign proved to be a valuable addition to the existing mobility centre, as it also targeted potentially interested people who had not been previously using public transport services at that time. A total of 1.500 randomly selected households located along two bus routes were contacted. The contacted households were given tailored information about the available bus services and they were also asked to make suggestions how to improve service. As a result of this campaign bus passenger numbers have grown over average by 12% on the two bus lines. The following were the key figures and findings of the campaign (AMC Waldviertel-Line, 2011):

- Altogether 868 responses were registered (54% of all 1500 contacted households). 56% was not a public transport user and 32% was a regular passenger.
- Altogether 725 households requested something: 568 returned the questionnaire, 433 requested a free regional map, 374 requested a bus network map, 317 requested a timetable, 309 requested ticket information and price comparisons, 229 requested a free weekday ticket, up to 227 requested various similar information products and free tickets.
- 94% of the contacted persons confirmed they learned new information, 91% welcomed the idea of this campaign, 83% would like to take part in the action again, 58% had more motivation to use the bus from now on, 56% has talked about this campaign to others.
- Residents have selected those information materials, which were actually the most important to use the services. Their feedback shows that they were very satisfied with the campaign and the quality of the information materials.
- The response rates of contacted households were similar to the response rates of households in urban settings (Waldhör et al., 2009).
- This pilot phase covered households in the vicinity of two bus lines. The campaign is ready to be adapted to the full territory of Waldviertel.
- A large number of useful feedback and concrete suggestions were received. These related to the printed and on-line timetables, departure times and travel times, preferred location of bus stops, connections with other transport means, and the continued availability of the bus services.
- The project team has identified the following priority follow-up measures from the collected feedback: to take more into consideration the needs of commuters, to designate more on-demand bus stops, to change departure intervals and weekend schedules, to improve connections. The feedback was also useful to identify cost saving measures, and to further improve marketing and communication.

#### Conclusions

Running a successful rural public transport system is a puzzle, and the AMC campaigns in the course of the SmartMove project offers just one piece of the solution. SmartMove is a first step to see how one can attract more riders considering given supply, which is far from ideal in its density and time span over the week. Nevertheless even under these limiting framework conditions, there is still a potential demand group, which could easily shift car trips towards public transport trips. It is not about to tell people in the rural areas to sell their cars, but to shift some of their trips, where there is no or no big loss of travel quality and additionally there could be a cost saving in parallel. Generally spoken there is a positive attitude in the population to behave more environmental friendly including environmental friendly mobility and AMC campaign could act as a door opener and impulse for modifying mobility behaviour.

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