SWITCH Project

Implementation Plan Manual
‘How to design a SWITCH campaign’

Intelligent Energy – Europe
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Contents

1. The SWITCH Project ........................................................................ 4

2. Roadmap for conducting a SWITCH campaign ...................... 7
   2.1. Preparation phase ..................................................................... 9
   2.2. General contact phase ................................................................. 11
   2.3. Segmentation phase ................................................................. 13
   2.4. Individualised contact phase .................................................... 14
   2.5. Delivering phase ...................................................................... 16
   2.6. Consulting phase ...................................................................... 17
   2.7. Evaluation Phase ...................................................................... 17

3. SWITCH consortium .................................................................... 28

INSERT list of figures

Figure 1: The SWITCH campaign: Course of action.........................................................6
Figure 2: Example of a registration postcard (Viennese SWITCH Campaign) ..................12
Figure 3: Examples of different incentives (left: SWITCH Campaign Antwerp; right: SWITCH Campaign Gdansk) ........................................................................................................14
Figure 4: Example of a service form (Viennese SWITCH campaign) ................................15
Figure 5: Examples of information materials (left: Viennese SWITCH Campaign, right: SWITCH Campaign London) ........................................................................................................16
1. The SWITCH Project

Car traffic is a major source of greenhouse gas (GHG) emissions and impacts urban quality of life in many ways. SWITCH focuses on promoting walking and cycling as important alternatives to car use especially for short urban journeys. These active modes are the basis of healthy, environmentally friendly multimodal travel behaviour with synergies to public transport. While many cities are working hard on improving conditions for these modes, the share of car trips for short urban journeys is still high. Even if more than 30% of trips made in cars in Europe cover distances of less than 3 km and 50% are less than 5 km. People seem to be not aware of active modes even if these are reasonable alternatives to short car trips and the positive effects active travel has for the individual wellbeing, life quality and sustainability.

The SWITCH project uses personalised travel planning approaches to encourage people to switch car trips to active modes. The implementation cites Antwerp, Gdansk, London, Donostia-San Sebastián and Vienna choose, combine and locally adapt approaches and develop them into their own SWITCH campaign. While the campaigns will look different in each of the implementation cities, the common denominator is a personalised travel planning approach addressing frequent car users using arguments from public health and mobility campaigning, and the use of ICT solutions (information and communication technologies). All SWITCH campaigns are applied to people in a period of life change (e.g. moving, changing employment status) in order to maximise the output.

The local SWITCH campaign is conducted once the target persons are identified. It aims on:

- raising awareness on the benefits of active travel,
- customising information,
- personalised advice,
- imparting knowledge on opportunities of active travel and
- encouraging people to walk and cycle more often.

This personalised travel planning approach will look different in each of the implementation cities but includes at least the following activities (see Fig. 1):

1. Telephone survey for recruitment and first data collection,
2. Sending out a service sheet offering information material,
3. Preparing personalised consultancy material for each participant individually based on the information collected in (2),
4. Personal delivery of information material chosen from the service sheet in (2), personalised consultancy material from (3) and ICT-tools,
5. Consumption of information material and application of ICT tools with support from the SWITCH team,
6. Supplementary measures are conducted.
**Evaluation** of the campaign in terms of processes and measureable effects is closely link to the implementation of the campaigns. The quantitative evaluation - the measurement of behavioural change – is integrated in the campaign process so far, that telephone or personal contacts with the target persons during the recruitment period is in unison the point of time, the baseline survey for the later on measurement of quantitative effects.

Persons are called and motivated to participate when address details of target persons are known or people react on SWITCH announcements and contact the call centre per phone, per email or by internet. The first personal contacts aims at persuading target persons participate, to gain information on current travel behaviour including car trips as well as at the segmentation. Activities to maintain behavioural change for longer as the campaigns lasts have the second effect of helping to motivate people to stay in the campaign for long term evaluation of measureable effects.

In order to capture the impacts of attracting, changing and retaining behaviour changes, the project collect data in three surveys in each of the five implementing cities (i.e. in total 15 surveys will be conducted):

- A baseline prior to the start of the campaign phase.
- Immediately after the mobility consultancy of each participant is finished.
- 6 months after the action, when the behavioural patterns have consolidated to see how much of the change is sustained.

Data collected comprises mobility pattern like mode choice, trip purposes, travel time and travel distances that allows quantifying behaviour. Further trip characteristics such as average speed, maximum speed or elevation profile covered will be derived from the basic indicators measured if possible. Basis for comparison and analysing the effects are the mobility pattern stated in the first travel behaviour survey right before the start of campaigns. The surveys are conducted by web- and/or phone based interviews.

The Implementation Cities of the SWITCH project identified the following **target groups** of their SWITCH campaigns:

<table>
<thead>
<tr>
<th>Implementation city</th>
<th>Target group to be addressed: People who:</th>
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</thead>
<tbody>
<tr>
<td>Gdansk</td>
<td>- have changed their educational or professional status incl. adults, students and pupils</td>
</tr>
<tr>
<td>Vienna</td>
<td>- have moved&lt;br&gt;- receive medical advice to increase their physical activities</td>
</tr>
<tr>
<td>London</td>
<td>- have changed their educational or professional status (families of children starting primary school full time; reception age)</td>
</tr>
<tr>
<td>Donostia-San Sebastián</td>
<td>- have moved&lt;br&gt;- have changed their educational or professional status&lt;br&gt;- receive medical advice to increase their physical activities</td>
</tr>
<tr>
<td>Antwerp</td>
<td>- are working in Antwerp and who will be affected by the big change moment of huge road infrastructure works</td>
</tr>
</tbody>
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Figure 1: The SWITCH campaign: Course of action

SWITCH
from car-based to active mobility using personalised
information and communication technology

Campaign approach (WP 3) & measurement (WP 4)

RECRUITMENT
- Choose target group, target person
- Get contact details of target persons

CONTACT PHASE
- Announce the campaign
- Contact the household/person

EVALUATION SURVEY I
- Evaluate the respondents’ current mobility behaviour
- Enquire about the segmentation/screening attributes

SEGMENTATION PHASE
- Segment respondents:
  - Include the respondents in the campaign: 1
  - Reward the respondents for their mobility behaviour: 2
  - Exclude the respondents from the campaign: 3

MOTIVATION PHASE
- Distribute service sheets (list of information material on
  environment-friendly mobility behaviour)
- Ask the participants to choose which information they want
- Offer incentives as reward for the participation

CONSULTANCY/SERVICE PHASE
- Provide the participants with their requested
  information and incentives
- Carry out individualised mobility consultancy (if requested)

EVALUATION SURVEY II
- Evaluate the respondents’ mobility behaviour just after
  the campaign
- Measure the short-term behavioural change

EVALUATION SURVEY III
- Evaluate the respondents’ mobility behaviour about six months
  after the campaign
- Measure the long-term behavioural change

QUALITATIVE EVALUATION
- Fill in process diaries
- Share thoughts in focus groups

Demand for information

Co-funded by the Intelligent Energy Europe Programme of the European Union

www.switchtravel.eu
2. **Roadmap for conducting a SWITCH campaign**

The preparation of SWITCH campaign:

1. Define the objective of the SWITCH campaign
2. Define the target group and the number of persons being addressed
3. Search for a financial partner
4. Develop a plan of proceeding
5. Develop schedules, employee and budget plans
6. Research of addresses of target persons
7. Decision and if necessary organisation of accompanying service actions
8. Collect already existing information material and order according to the empirical formula
9. Define incentives and order according to the empirical formula
10. Prepare personal consulting
11. Schooling of the employees
12. Prepare the press release and the involvement of local media

Contact target persons of SWITCH campaign

1. Cover letter with the plan of the personalised travel planning process and request to participate
2. Collect signatures of regional personalities, signatures and logos of regional institutions
3. Schooling of contact persons
4. Define hours of availability for the contact persons and release them from other tasks for the period
5. Prepare the postcards of reply
6. Prepare the contact database according to the questionnaire
7. After receiving the postcards of reply: Call the target persons and identify the information needs

Identifying the information needs – Segmentation of SWITCH participants

Three groups:

1. Persons, who do not want to participate: they will be released from the survey
2. Persons, who already implement the regarded behaviour: give a thank-you gift
3. Persons, who do not implement the regarded behaviour, but are interested in participating: identify the information needs

Send the SWITCH-service form

1. Arrange a service form with information material, define the question of personal information, of personal consulting and define the incentives
2. Send the service form, if necessary follow up with a call
3. Work out personal information
4. Organize dates of consulting
5. Provide the incentives

Hand over the service packages

1. Prepare a personal service package with information material and personal information. Prepare a meeting date proposal and the incentives.
2. Should the service package occur by personal or a postal delivery?
3. In the case of personal delivery: Engage and school the deliverer
4. In the case of postal delivery: Organise the materials for sending

Consulting

1. Engage qualified employees
2. Bring little incentives/ gifts with you
2.1. Preparation phase

Definition of the objective and the target group of the campaign

In the first instance, it is important to define the objective of your marketing campaign. 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; i.e. the personalised travel planning campaigns of the SWITCH project are focusing on frequent car users in life changing moments that should be convinced to replace short car trips by trips with active modes by using ICT-tools and health arguments. Concentrating on a certain target group (for example: elderly people, young people, students, people with changes in their place of residence, tourists) could be an advantage as the information materials and accompanying active measures can be adjusted to the needs of the target group.

Support of local stakeholders

The personalised travel planning 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 affected lines should be discussed with representative of the provincial and local government, public transport associations as well as PT operators, health associations and mobility managers. The aim is to agree on particular lines of interests and to achieve a common ownership on the implementation of the personalised travel planning 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, delivering and personal consulting phase.

Development of a road map

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

How many persons should be addressed? Some tasks are mostly independent of the number of participants, for example the development of a concept or the collection of information to be used in the campaign. Other tasks like printing material, sending of material, answering of phone queries or individual consulting require more resources with every additional person to be included in the campaign.

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

Preparation of the sample size

In order to define the target group and the number of persons being addressed (also dependent on the financial resources available), lists are prepared with the addresses of the target persons. Contacts to the local government established could support the access to these data. Experiences show, that about one fourth of all households is not available as data may be outdated or wrong. In addition about one fourth – and even more– is not interested in participating in the SWITCH campaign. On the basis of already implemented projects concerning personalised travel planning can be maintained, the campaign can be regarded as successful.

Collection of existing information material

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

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

- Whole number of target persons contacted (gross),
- from these 40% are replying,
- from these up to 50% are ordering material,

=> Number of information materials and „thank you presents“, which should be available.

Thus, information materials and incentives to be ordered is about 0.20*number of target persons contacted (gross).

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

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

Staff training for all persons involved

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

Preparation of press releases and the involvement of local media

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

2.2. General contact phase

First contact by sending an information letter and a registration postcard

In the general contact phase the target persons are accessed by mail and all main information about the campaign is given. Although the response rate might increase by contacting target persons firstly by phone, it might cause legal problems in some countries, as people are contacted they have not asked for and the campaign is not related to market research only. For this reason, it is recommended at first to send an initial letter to inform about the campaign launched in the region. The main objectives and the process should be described shortly within one page at maximum. An invitation for participation has to be included as well.
The willingness for participation is increased

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

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

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

![Example of a registration postcard](image)

**Figure 2: Example of a registration postcard (Viennese SWITCH Campaign)**

Follow up phone calls

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

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

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

### 2.3. Segmentation phase

Identification of respondent groups

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

**Respondent group and action to be undertaken**

1. **Persons not interested at all** → no communication will be established, they will be excluded from any next steps.
2. **Active travellers with no further information needs** → they will receive a "thank you present" and a letter to support and to encourage them to maintain their behaviour.
3. **Active travellers with further information needs** → they will take part on the further steps of the personalised travel planning campaign and will receive a "thank you present" and a letter of support.
4. **Non-Active travellers with further information needs** → they will take part on the further steps of the personalised travel planning campaign and will receive a "thank you present" and a letter of support.

The idea to send persons, who are travelling active already, an incentive 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 that their sometimes altruistic behaviour is not recognized at all by the society. The person can chose one incentive out of a list with several opportunities. Ideally, the incentives should be specific for the topic and useful. For example mobility related presents can be
• bike saddle cover,
• pocket lights,
• pocket umbrellas,
• reduced or free public transport tickets
• reduced fares or free bike rental (e.g. electric bikes).

Figure 3: Examples of different incentives (left: SWITCH Campaign Antwerp; right: SWITCH Campaign Gdansk)

2.4. Individualised contact phase

Distribution of service forms

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

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

In order to save costs it is recommended to use existing information material as much as possible, e.g. material of other information providers or companies:

• Are there any relevant materials of regional or national institution on this topic available?
• Which complement materials can also be relevant for the target group?
• The focus should be widely and open.
Preparation of personal information based on the requested information

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

- **Individualised time tables**: Time tables of all lines, which stop nearby the desired address. Eventually including a description, how to access the stop (e.g. route information for walking including average walking time).
- **Personalised 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.
- **Active travel and health benefits**,
- **Information on walking and cycling**,
- **Information about additional active measures organised in the region**, e.g. walk-shops, side events, information 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 offered as 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 personalised service package for each participant need to be prepared. They usually include:

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

### 2.5. Delivering phase

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

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*Figure 5: Examples of information materials (left: Viennese SWITCH Campaign, right: SWITCH Campaign London)*
2.6. Consulting phase

If a personal consultancy is offered on the service form, it should be carried out as soon as possible. It is important, that well-informed employees carry out this consulting. In many areas, professional consultants for these issues are available, as mobility agencies, 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.

2.7. Evaluation Phase

In order to quantify the success of the personalised travel planning campaign, an evaluation should be included in the process of the personalised travel planning campaign.

In SWITCH a measurement of mobility behaviour change achieved will be conducted to assess the impacts of the local SWITCH campaigns. It will be supplemented by a qualitative impact measurement focusing on various aspects, e.g., health impacts and physical well-being, improvement potentials of local infrastructure for active mobility and the effectiveness of various SWITCH components. Based on the quantitative and qualitative impacts identified, assessments of environmental impacts and total economic evaluations will be conducted.

It is also advantageous to monitor and evaluate the process, to identify certain points to improve the effectivity and efficiency of the campaign. Process diaries are useful instruments and are provide in the frame of WP4.

Main target = Switch from private car use to active travel (cycling, walking)
<table>
<thead>
<tr>
<th></th>
<th>SWITCH Basics for local campaigns</th>
<th>Information to be provided for local campaigns</th>
<th>Lessons learned from former projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment</td>
<td>Choose and specify target group/target persons and the spatial boundaries of your campaign if needed</td>
<td>In general: people using the private car at least sometimes In specific: [see proposal but make clear who are the persons you will consult]</td>
<td>It can be an advantage to choose a clear defined area of your city, where high success is expected.</td>
</tr>
</tbody>
</table>

Comment on what you will do in this phase and who will be responsible:

| Get contact data of target persons | Personal contact and address data is needed | How do you intend to approach the contact persons? How do you intend to get the address data (including telephone numbers)? What partners do you need and how do you convince them to support you? What steps will you undertake to get into personal contact? |

Comment on what you will do in this phase and who will be responsible:
<table>
<thead>
<tr>
<th>Contact Phase</th>
<th>Switch Basics for local campaigns</th>
<th>Information to be provided for local campaigns</th>
<th>Lessons learned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Announcement</td>
<td>Announcement of campaign and of the telephone contact later on by an official letter to addresses of target persons (Template will be available and should be integrated in local CI)</td>
<td>Who is the right person to sign the letter/to promote campaign? What kind of distribution channels will you apply?</td>
<td>Be aware that it should be a trustworthy and almost neutral person; if possible there should be no segmentation by political parties etc. The choice of person may depend on the area or topic chosen for campaign.</td>
</tr>
<tr>
<td>Comment on what you will do in this phase and who will be responsible:</td>
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<td></td>
<td></td>
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<tr>
<td>Conduct 1st baseline interview (evaluation survey I)</td>
<td>Translation of questionnaires, Staff for conducting the interviews, Infrastructure for conducting the survey, Decision on method of survey: Face-to-face interviews, telephone interview, web questionnaire</td>
<td>Define who is conducting the survey (own staff, subcontract). What is the legal framework for conducting the survey? Who has to give what permission? Who can translate the questionnaires?</td>
<td>Professional staff, experienced in telephone marketing, is important for a good response rate (low dropout rate). Most important is to convince people to join the campaign at this point of time. Best time for contacting persons is between 4 pm and 8 pm during week time, Saturdays are allowed until 12 am and no calls on Sundays. Each target person should have at least tried to be reached seven times</td>
</tr>
<tr>
<td>SWITCH Basics for local campaigns</td>
<td>Information to be provided for local campaigns</td>
<td>Lessons learned</td>
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<tr>
<td><strong>Segmentation</strong></td>
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<tr>
<td>Segment 1st baseline interview</td>
<td>Identify persons likely to change behaviour, (Questions for segmentation are in the 1st baseline questionnaire), contacts have to be categorised in four categories for further treatment</td>
<td>Who can make the first evaluation? What target person becomes a participant?</td>
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</tr>
<tr>
<td>Comment on what you will do in this phase and who will be responsible:</td>
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<table>
<thead>
<tr>
<th><strong>Motivation</strong></th>
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</thead>
<tbody>
<tr>
<td>Prepare information material</td>
<td>List of material: Local information (provided by city): e.g. Cycling and walking maps,</td>
<td>What are the expected information needs of target persons? Name what information is available and to what</td>
</tr>
<tr>
<td>Comment on what you will do in this phase and who will be responsible:</td>
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<tr>
<td></td>
<td></td>
<td>What is the state of knowledge and the state of distribution of information in the city? How to distribute something “new, they do not know yet” to the</td>
</tr>
<tr>
<td>Neighbourhood maps, Information on dos and don’ts for cyclists and walkers; Better health by active travel, General information, (provided by TSP) Benefits of active travel etc.</td>
<td>extent! Do you plan to provide new information and does it have to be printed, published etc.? Who can provide additional information? Who stores the information material and where?</td>
<td>target person? Be aware that storing information material and incentives need some space.</td>
</tr>
</tbody>
</table>

Comment on what you will do in this phase and who will be responsible:

| SWITCH Basics for local campaigns | Information to be provided for local campaigns | Lessons learned |

| Send out service sheet | Offering information, personal consultancy (and incentive) | What are the best distribution channels in your city? Which will you apply? How will you distribute the service sheet (mail, email or personal hand over at doors, events etc.) | Professional design, readability, accessibility |

Comment on what you will do in this phase and who will be responsible:
### Incentives

| Incentives | Incentives to motivate and endorse the behaviour offered in the service sheet and/or during the contact phase to convince persons to register on a platform and to become participants of the campaign etc. | What kind of incentives do you intend to provide?  
To what point of time in the campaign process do you intend to use them for what purpose?  
What kind of incentives in what number can you afford?  
Are there any sponsors or other supporters?  
Who stores the incentive at which place? | Incentives should show the connection to the campaign topic and be of a certain value and quality.  
Incentive should be useful for the participants (a ball pen with city logo is not enough). Incentives support the broader image of the campaign and the identification of participants with the campaign. |

Comment on what you will do in this phase and who will be responsible:

| SWITCH Basics for local campaigns | Information to be provided for local campaigns | Lessons learned |

| Consultancy |  |

| Service Sheet/Service phase | Return of service sheet. People who did not send the service sheet back are contacted by mail or phone to remind them they still need to answer or to answer the service sheet directly | Who is collecting the service sheets?  
Who is doing the reminder calls/letters and emails?  
Who asks the participants to complete the service sheet by phone? | Reminder one to two weeks after sending the service sheet by mail, one week after sending it by email.  
If the participants do not send the completed service sheet, offer them the opportunity of telling their information needs in a phone call. |
Comment on what you will do in this phase and who will be responsible:

| Arrange information material | Arrange personalised information packages | Who will arrange the information material to personalised packages geared to the service sheet? Are you using own existing staff or do you need additional staff. | Staffs needs to be reliable but not highly qualified. More crucial is to have enough staff and time for that. Be aware that sorting and string information material and incentives need some space. |

| Comment on what you will do in this phase and who will be responsible: |

<table>
<thead>
<tr>
<th>SWITCH Basics for local campaigns</th>
<th>Information to be provided for local campaigns</th>
<th>Lessons learned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribute information</td>
<td>Personal delivery Personalised information packages</td>
<td>Who will distribute the information material to personalised packages geared to the service sheet? Are you using own existing staff or do you need additional staff.</td>
</tr>
</tbody>
</table>
Comment on what you will do in this phase and who will be responsible:

| Appointments for personal consultancy | Personal consultancy is offered, when asked for in the service sheet. Appointment for this consultancy talks has to be fixed with the participant. | Who is arranging the appointments? | Appointments should be fixed shortly after receipt of the service sheet |

Comment on what you will do in this phase and who will be responsible:

<table>
<thead>
<tr>
<th>SWITCH Basics for local campaigns</th>
<th>Information to be provided for local campaigns</th>
<th>Lessons learned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal consultancy</td>
<td>Personal consultancy is offered, when asked for in the service sheet. Visits at the participants' houses take place. Alternatively counselling interviews can take place at a consultancy office.</td>
<td>Consulting person has to have comprehensive knowledge, must be trustworthy and must be able to give reliable information and consultancy. Check whether a mobility agency/association can provide experienced staff.</td>
</tr>
</tbody>
</table>
Comment on what you will do in this phase and who will be responsible:

<table>
<thead>
<tr>
<th>Test new behaviour and further motivation, supplement measures</th>
<th>Encourage people to test and enjoy new behaviour</th>
<th>What do you intend to do to encourage persons to test new behaviour?</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are many examples available from other projects:</td>
<td>RTF System with games and competitions (IH), Apps to track behaviour and measure positive effect (moves, ohmage, etc.), Test rides with private or with hire cycles, events, competitions</td>
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</table>

Comment on what you will do in this phase and who will be responsible:

<table>
<thead>
<tr>
<th>Todo</th>
<th>SWITCH Basics for local campaigns</th>
<th>Information to be provided for local campaigns</th>
<th>Lessons learned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation survey II</td>
<td>Translation of questionnaires, Staff for conducting the interviews, Infrastructure for conducting the survey,</td>
<td>Define who is conducting the survey (own staff, subcontract). What is the legal framework for conducting the survey? Who has to give what permission?</td>
<td>Professional staff, experienced in telephone marketing, is important for a good response rate (low dropout rate). Most important is to convince people to join the campaign at this point</td>
</tr>
<tr>
<td>Decision on method of survey: Face-to-face interviews, telephone interview, web questionnaire</td>
<td>Who can translate the questionnaires?</td>
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<tr>
<td>How do you want to ensure a high response rate? How do you want to make sure, that almost all participants take part in the second survey?</td>
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<tr>
<td>Best time for contacting persons is between 4 pm and 8 pm during week time, Saturdays are allowed until 12 am and no calls on Sundays. Each target person should have at least tried to be reached seven times before being removed from the list of target persons.</td>
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<tr>
<td>Offer incentive for participation in interview at the end of survey III</td>
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<tr>
<td>Comment on what you will do in this phase and who will be responsible:</td>
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</table>

**Evaluation survey III**

- Translation of questionnaires, Staff for conducting the interviews, Infrastructure for conducting the survey, Decision on method of survey: Face-to-face interviews, telephone interview, web questionnaire
- Define who is conducting the survey (own staff, subcontract).
- What is the legal framework for conducting survey?
- Who has to give what permission?
- Who can translate the questionnaires?
- How do you want to ensure a high response rate? How do you want to make sure, that almost all participants take part in the survey?
- Professional staff, experienced in telephone marketing, is important for a good response rate (low dropout rate). Most important is to convince people to join the campaign at this point of time.
- Best time for contacting persons is between 4 pm and 8 pm during week time, Saturdays are allowed until 12 am and no calls on Sundays. Each target person should have at least tried to be reached seven times before being removed from the list of target persons. Offer incentive for participation in interview at the end of survey III.
take part in the third survey? and no calls on Sundays. Each target person should have at least tried to be reached seven times before being removed from the list of target persons.

Offer incentive for participation in interview at the end of survey III

Comment on what you will do in this phase and who will be responsible:
3. SWITCH consortium

Five European cities take the lead in support SWITCH travel – supported by eight experts in alternative travel, health or economical aspects of mobility. This enthusiastic team combines practical expertise; a clear and transferable methodology; and tried and tested examples of locally effective campaigns.

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For further information please visit www.switchtravel.eu

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