



## **Deliverable 5 – Best Practice Guidelines**

**TAPESTRY**  
**Contract No: 2000-10988**

**Project Co-ordinator:** **Transport & Travel Research Ltd, UK**

**Partners:** Transport Studies Group, University of Westminster  
Hampshire County Council  
Hertfordshire County Council  
Langzaam Verkeer  
Komitee Milieu en Mobiliteit or Committee for Environment and Mobility  
Consultores Em Transportes Inovação e Sistemas S.A.  
Aristotle University of Thessaloniki  
Agenzia per i Trasporti Autoferrotramviari Del Comune Di Roma  
Asstra-Associazione Trasporti  
Citta di Torino  
Forschungsgesellschaft Mobilität - Austrian Mobility Research  
Ayuntamiento de Vitoria-Gasteiz  
CH2MHILL  
Uniunea Romana De Transport Public  
Gestionnaires Sans Frontieres  
Regia Autonoma De Transport in Comun Constanta  
Interactions Ltd  
Communauté Urbaine de Nantes  
Société D'Économie Mixte Des Transports De L'Agglomération Nantaise  
Centre D'Études sur les Réseaux, Les Transports L'Urbanisme et Les Constructions Publiques  
T.E.Marknadskommunikation A.B.  
Gävle City, The Technical Office  
Socialdata Institut für Verkehrs- und Infrastrukturforschung GmbH

**Date:** July 2003



PROJECT FUNDED BY THE EUROPEAN  
COMMISSION UNDER THE TRANSPORT  
RTD PROGRAMME OF THE  
5<sup>TH</sup> FRAMEWORK PROGRAMME

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## Preface

TAPESTRY is a European R&D project looking at communication programmes in the transport sector. The overall aim of the TAPESTRY project is to increase knowledge and understanding of how to develop effective communication programmes to support sustainable transport policies in Europe. There are seven main objectives:

1. To manage the TAPESTRY project effectively and efficiently, including a programme of three case study clusters and follower sites, to meet TAPESTRY objectives within resource constraints.
2. To produce and maintain during the life of the project a European-wide state-of-the-art on the principles and practice of promoting sustainable transport and its assessment, drawing on the Consortium's past experience in projects such as INPHORMM and CAMPARIE.
3. To develop and implement clusters of case studies, in which the 'state-of-the-art' principles and best practice can be applied, monitored and evaluated.
4. To develop a common assessment framework for all case studies covering the life cycle of design, implementation and review, allowing for a local assessment, a European cross-site assessment and a thematic assessment.
5. To create an active network of interested individuals and organisations across the case study and elsewhere, to share good practice in the use of communication tools to deliver transport policies and plans, including links to partners in the USA, Central and Eastern European Countries and Iceland.
- 6. To produce guidance, best practice and resource materials for organisations and transport professionals in the field of communication, marketing and community development.**
7. To actively exploit the project results in all European countries, through both existing city co-operations networks and the network developed during the project lifetime itself.

Three case study clusters have been formed that deal with the promotion of sustainable transport modes; the image of public transport; and with communications programmes that link transport to other sectors such as health and the environment.

The results of the case studies and the experience gained from the project, through activities such as the concertation process, inform the final set of four TAPESTRY outputs:

### **Best Practice Guidelines (this Deliverable)**

A set of guidelines, based on the experiences of the TAPESTRY case studies, setting out a step-by-step approach to planning, designing and implementing campaigns. The guidelines are illustrated by examples from the TAPESTRY case studies.

### **Campaign Assessment Guidance**

An updated version of the Common Assessment Framework, based on the experience of the case studies carried out in the course of TAPESTRY.

### Policy Recommendations

These are based on other TAPESTRY Deliverables and targeted at policy makers, national governments and non-governmental organisations, local and regional governments, including European city/ regional networks.

### Interactive CD-ROM

The full set of TAPESTRY outputs will be condensed on to a CD-ROM, which will enable readers to explore the results of TAPESTRY through a series of search methods.

This Deliverable aims to set out guidelines on how best to plan, design, implement and assess a campaign. It draws on the experience of the TAPESTRY partners, and in particular the case study partners who implemented 18 pilot campaigns in different settings throughout Europe. Table A provides an overview of the TAPESTRY case studies.

**Table A : Overview of TAPESTRY case studies**

Case study	Description	Duration
<b>Intermodal</b>		
Public Transport Promotion to Schoolchildren (Rome-Italy)	Aimed to reduce the use of private vehicles and increase the use of public transport modes through various marketing techniques, including a school visit to a public transport depot, a CD Rom game, and competitions.	February to May 2002
Travel Awareness in Austrian Schools (Linz, Graz and Vienna – Austria)	Aimed to raise awareness in schools about the need to change mobility behaviour. The scheme was linked to a national awareness campaign to promote the safety of non-car users and was implemented within three schools and one kindergarten in the cities of Graz, Linz and Vienna.	Vienna – Spring 2002 Graz – Early 2002 Linz – Summer 2002
Mobility Education in Geel and Mol (Belgium)	Both campaigns centred around producing a school travel plan; the individual campaigns each had a slightly different focus. The city of Geel aimed to optimise usage of bicycle networks and existing public transport, whereas Mol aimed to work closely with a local mobility centre in the production of its school travel plan.	November 01- September 02
Week of Soft Road User (Belgium)	The case study was based around the annual soft road user week and the public transport week. The two campaign weeks focus mainly on awareness of sustainable transport modes.	May and September 2002
Individualised Marketing in Viernheim (Germany)	Promoting the use of environmentally friendly modes through a unique concept of motivation, information and systems experience. It focused on individualised information and motivation, personal visits and surveys to households and companies to encourage the use of sustainable modes of transport.	Household campaign – January – May 2001 Freight campaign – Winter 2002-03
Efficient car use (Belfast - UK)	Aimed to encourage more efficient use of private motor cars through a campaign promoting car sharing and park & share facilities.	Spring 2003

Case study	Description	Duration
<b>Mode Repositioning</b>		
Greenside of the Black Seaside (Constanta - Romania)	The aim of this case study was to encourage visitors to the Black Seaside to use public transport during their stay. The campaign used a number of different media, including radio broadcasts and posters.	June – August 2002
Dublin Bus Anti-Vandalism Campaign (Dublin - Ireland)	This case study focused on the city of Dublin and aimed to investigate approaches that will improve the environment for passengers on bus services. It is hoped that the improvement of the on-bus environment will lead to better quality of travel, the freedom to travel without fear, and an increase in bus usage.	April – August 02
Interactive Marketing of Rural Buses (Hampshire - UK)	Aimed to explore new and innovative measures designed to promote sustainable travel in a rural setting. The project explored an ‘interactive’ marketing approach, promoting existing bus services.	March -July 02 Development of initiatives  July-October 02 Implementation of initiatives
National Car Free Day (Nantes - France)	The broad objectives of the campaign were to create more positive attitudes towards modes other than the private car and to improve modal split towards such forms of transport by increasing public awareness.	September 2001
Bus line promotion (Nantes - France)	Aimed to actively promote the image of using the bus to households along a particular line. This marketing campaign targeted both existing and potential users, and focused on providing useful information and promoting and advertising services.	September 2002
Sustainability and Employment by Marketing (Stuttgart - Germany)	The aim was to combine soft policy marketing measures (information, communication, publicity) with employment securing measures. Education and training of public transport employees to improve occupational flexibility, working conditions, job security and employee retention.	June 2002
<b>Health &amp; Environment</b>		
Targeting the Environmentally Aware (Hertfordshire - UK)	This project built on the experience of previous travel awareness campaigns and analysis of results. As a result of all the analysis it was determined that the group could best be reached through the campaign for Walk to School Week 2002.	20 – 24 May 2002
Air Quality Information and Car Pooling (Vitoria - Spain)	The aim of the campaign was to make the general public more aware of transportation and environmental air quality issues. The campaign involved two types of action: 1) to organise an information space for the public located in the city; and 2) to foster car	1) June – July 2002  2) May – June 2002

Case study	Description	Duration
	pooling among employees of the local authority.	
Promoting Cycling Walking and Public Transport for Health (Gävle - Sweden)	Aimed to build on an already high level of public awareness and increase market shares for public transport and environmentally friendly modes and reduce the use of cars. The City of Gävle, in co-operation with the Ministry of Transport, the schools administration and one specific school, set up two different campaigns with common objectives, utilising different means and target groups.	Ministry of Transport December 2002  Hagastrom School– June and August 2002
Walking and cycling to School (Dublin - Ireland)	The aim of this case study was to reduce the use of the private motor car for taking children to school. Promotion of walking and cycling as safe and healthy alternatives formed the focus of the study with different degrees of infrastructure development providing a controlled environmental variable.	Campaign in the field April - May 2002

The guidelines have been drafted with a view to providing all those who have the task of managing a sustainable transport-related campaign with practical advice on the steps to take. However, much of the detail could equally be applied to other sectors, such as environmental or health related campaigns.

The Deliverable is divided into seven sections:

Section 1 sets out the role of campaigns, their value as tools to tackle transport-related problems, an explanation of the structure of a campaign, and the links between attitudes and behaviour;

Section 2 provides a brief overview of the strategic and policy considerations that need to be made prior to planning a campaign.

The following five sections include more technical details on the campaign management, design, implementation and assessment processes.

Section 3 presents a step-by-step approach to all aspects of campaign management, including the practicalities of establishing partnerships and an effective campaign team. Guidelines on how to liaise with target audiences and PR or advertising agencies are also given.

Section 4 looks at the factors underpinning a successful campaign design. The importance of conducting pre-research with target groups is highlighted, and details are given of how to best define the campaign messages, message givers, tone and delivery mechanisms.

Section 5 outlines the elements of the campaign to be monitored throughout the implementation process, such as inputs, outputs and external factors. In addition, it proposes strategies for problem identification and solution.

Section 6 sets out an approach to monitoring and assessing campaigns, based on the ‘Seven Stages of Change Model’ developed as part of TAPESTRY.

Section 7 combines guidance on how to present the results of a campaign with some practical suggestions on how best to present results to policy makers, other professionals, the press and the public.

Finally, Annex 1 provides a checklist to assist in the campaign planning and design process, which summarises the main elements set out in Sections 3 and 4.

Each of the sections has been drafted by a TAPESTRY partner with specific expertise in and experience of the subject being addressed. In addition, they are all illustrated by examples from the TAPESTRY campaigns.

# 1 THE ROLE OF CAMPAIGNS

## 1.1 Why a campaign?

### 1.1.1 Problems caused by car use

In many European cities over the last twenty years, traffic levels and car ownership have increased. As car usage rises, so do negative effects such as casualty numbers, congestion, noise, air pollution, contributions to global warming, and the amount of space taken up by the car. These problems in turn affect quality of life. It is clear that some of the pollution-related problems can be tackled by reductions in fuel consumption and 'cleaner' vehicle technology. However, other problems cannot be solved by improvements in motoring technology. These include the threats to individual health (through road traffic casualties and lack of physical activity), the economy (through congestion and time lost), the environment (in terms of land use, noise and effects on wildlife etc) and our communities (severance and loss of community space). Levels of car traffic need to decrease if these problems are to be solved.

A distinction is sometimes made between so-called 'hard' and 'soft' policies. 'Hard' policies are those relating to infrastructure (such as road building), taxation, or new services. These can have an important role to play in combating the growth in car use. For example, the introduction of a new bus or metro line can be an important measure to encourage more people to use public transport instead of the car for certain trips. However, it is clear from those cities with good public transport systems that new services alone will not bring about substantial changes in travel behaviour. At the most basic level, if infrastructure measures or a new service are to be used, people have to be informed of their existence. Such information campaigns have become grouped together under the heading 'soft policies'; initiatives that use communications, publicity or education to change attitudes and behaviour towards travel behaviour.

### 1.1.2 Role of 'Soft' policies

Research<sup>1</sup> has demonstrated that subjective factors are playing an increasingly important role in transport policy and planning. As a result there has been a corresponding increase in the development of various types of 'soft policies'. This is partly a response to a belief that transport planning alone is not enough to provoke changes in transport behaviour, and that infrastructural changes need to be complemented by strategies aimed at persuading people to change their behaviour.

The growth in the use of communications methods to achieve social objectives owes a great deal to commercial brand marketing. Since the 1980s, some politicians, public transport operators and other organisations working in favour of sustainable modes have recognised the value of campaigns in establishing brands, and begun to develop communications techniques. Since then, there has been a growing acceptance that campaigns and communications are the key to making people aware of the benefits of using sustainable modes; to attracting customers for new services such as public transport routes; to encouraging cycling; and to reviving walking for short trips.

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<sup>1</sup> Brög, W. & Erl, E. (1996), 'Can Daily Mobility Be Reduced Or Transferred to Other Modes?' European Conference of Ministers of Transport (ECMT), Round Table 102, Paris 1996

A key role of ‘soft’ policies is often simply to inform people who are using their car for the majority of trips about other modes. Often car users have little knowledge about how to use public transport, or have inaccurate perceptions about cycling and walking. In addition, there is a lack of information about the advantages of these transport modes. It is therefore necessary to close this gap with targeted information and services. This is particularly the case for public transport, where lack of awareness about when, where and how services operate can be a major barrier to its use.

In addition to providing information on how to use sustainable modes, campaigns can help increase the acceptance of the need for car restraint measures. Restraint measures and initiatives in favour of environmentally friendly modes are accepted more readily and effectively if there is an understanding among the general public of the reasons behind them. A combination of measures, linking ‘hard’ and ‘soft’ transport policies in a co-ordinated strategy, has the greatest chance of success<sup>2</sup>.

Several different case studies in TAPESTRY have adopted this combined approach. For example in Geel and Mol (Belgium), part of the campaign focused on promoting new ‘traffic educating routes’ which were specifically designed and built to enable pupils to cycle or walk to school in normal traffic, but using the safest route. In Nantes (France), a marketing campaign promoted one specific bus route. This route was judged to be particularly good in terms of frequency and journey time compared to the car. In addition, the majority of the bus fleet used new low-emission vehicles.

### ***1.1.3 Links between attitudes and behaviour: a model for change***

Before starting a campaign it is important to understand the links between attitudes and behaviour. This understanding is important for the success of the campaign design process and therefore of the campaign itself. A common mistake is to think that changing behaviour is a quick or one-step process. This has led to the failure of many campaigns in the past. It is unrealistic to believe that people who have never previously used environmentally-friendly modes will use them just because they have read some information. Research in other sectors, such as health promotion, tends to show that changes in awareness and attitudes have to happen first, before behavioural change can occur. A number of models have been developed which explain this process. Two of the key models are the ‘Stages of Change Model’ and elements of the ‘Theory of Planned Behaviour’<sup>3</sup>. These have been combined by the TAPESTRY project into a new model specific to transport campaigns. This is the ‘Seven Stages of Change Model’, shown in Figure 1.1.

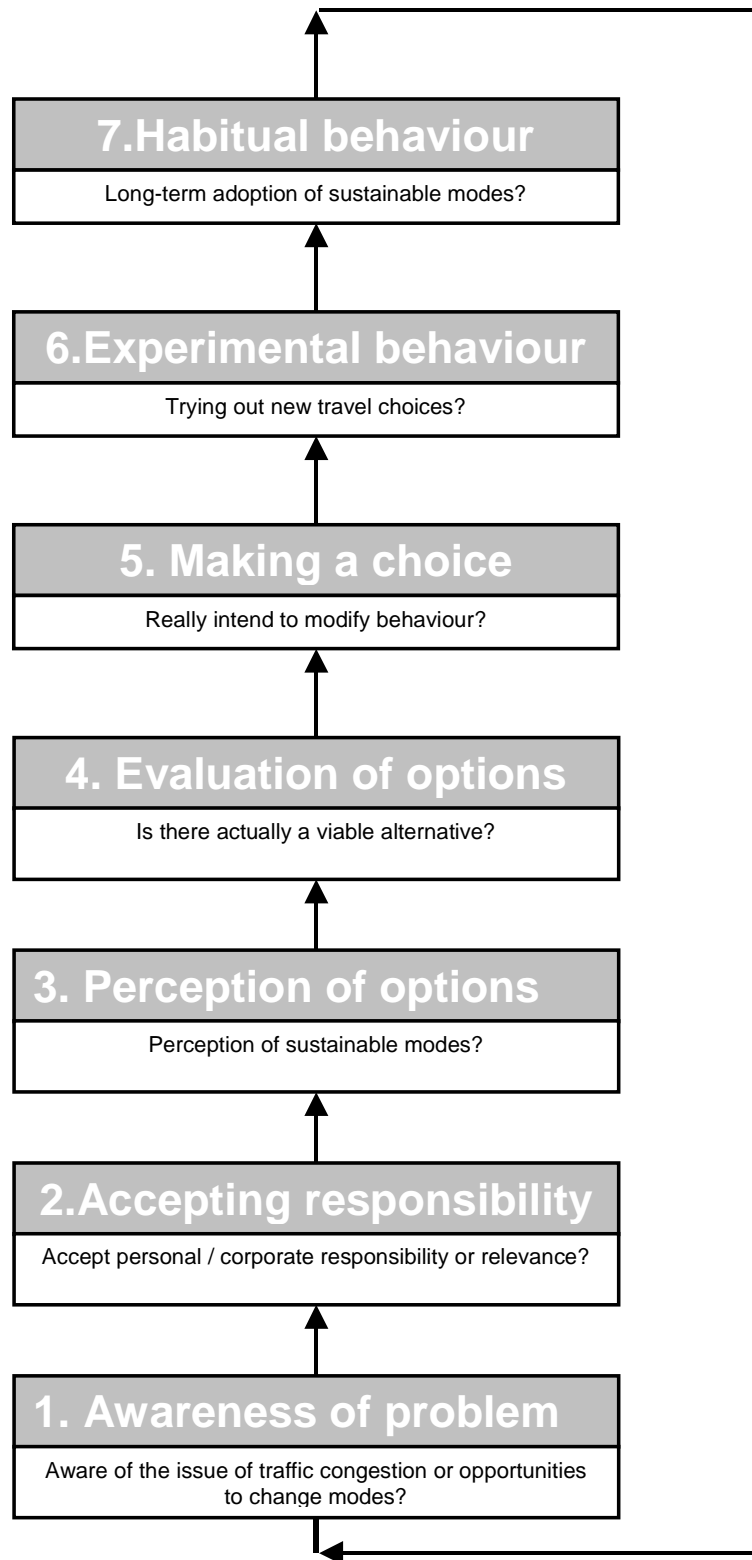
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<sup>2</sup> see Socialdata: Wirkungsanalyse Stadtbahn Saar. Maximale Ausschöpfung des ÖPNV-Potentials durch kundenorientierte Angebotsgestaltung und Individualisiertes Marketing am Beispiel eines neuen Stadtbahnsystems im Auftrag des Bundesministeriums für Verkehr, Bau- und Wohnungswesen. München Februar 1999.

<sup>3</sup> For the “Stages of Change Model” see: Prochaska, J & DiClemente, C., (1983) ‘Stages and processes of self-change of smoking: Toward an integrative model of change’, *Journal of Consulting and Clinical Psychology*, Vol. 51, pp 390-395.

For the “Theory of Planned Behaviour” see: Ajzen, I., ‘A theory of planned behaviour’, from: Kuhl, J., Beckmann, J., eds. (1998) ‘Action – control: From Cognition to Behavior’, Springer, Heidelberg.

**Figure 1.1: The seven stages of change model**



The model sets out a seven-stage process:

1. Awareness of problem or of opportunities

Awareness of the problems caused by car traffic (e.g. congestion, pollution etc.) is the first stage. Being aware that there are problems to be solved is a prerequisite for accepting the need for action to help solve them. However, in some cases, it may not be a question of being aware of problems, but rather of the opportunities that exist to change travel behaviour.

2. Accepting responsibility or relevance

The second stage is to accept a level of personal responsibility for the problems and for contributing to the solutions. Car users are unlikely to move any further towards changing their behaviour as a result of a campaign if they do not accept that they have a personal part to play in alleviating problems caused by car traffic. Equally, this stage could also be the acceptance of the relevance of a particular message, policy or service, having been made aware of the opportunities they may present.

3. Perception of options

The way in which alternative modes are perceived will have a considerable influence on whether they are viewed as viable alternatives to the car. The most important factors at this stage are those related to the 'system' (e.g. whether public transport is seen to be on time, safe, easy to use), and those related to 'society' (e.g. an individual's dependence on the views of other people in shaping their own attitudes and behaviour). The latter factors include the valued opinions of family members, friends and work colleagues, as well as what is seen to be the norm in the community.

4. Evaluation of options

People may perceive different modes in different ways. However, the way in which they prioritise the characteristics of the alternatives may vary according to particular circumstances. People will only consider voluntarily changing mode if they have a positive perception of the alternatives with regard to the aspects that are most important to them. For example, if the most important factor for them is cost, they are unlikely to favour buses if they think the tickets are too expensive, even if a bus trip is seen to be quicker than the same trip by car. This stage therefore will assess which factors are most important in travel choices.

5. Making a choice

This fifth stage relates to whether an individual really intends to change to using an alternative mode for certain trips. The establishment of an intention to change comes one step before a measurable change in behaviour.

6. Experimental behaviour \*

Trying out a new mode for certain trips for a short time on an experimental basis is the penultimate step. If the experience is positive, then this change may become more permanent. If, however the (positive) perceptions are not confirmed by experience, then it may lead to a re-evaluation of the options and a relapse to the old behaviour. A potentially greater risk is that previously held 'negative' perceptions are re-confirmed. In either case, this may also

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\*N.B. There are some cases where behaviour is a one-off event for a given individual (e.g. making a visit to a particular area as a tourist). Here the notions of 'experimental' and 'habitual' behaviour are not applicable and they reduce to one-step in assessments of whether behaviour was influenced by the campaign.

lead to a re-assessment of their actual / stated level of concern about the underlying problem, or their willingness to accept personal responsibility.

### 7. Habitual behaviour \*

The final stage is the long-term adoption of the new mode for certain trips. When this stage has been reached, the old habitual behaviour has been broken and a new pattern established. This is final goal of a programme to change travel behaviour, but is the most difficult to achieve. In addition, efforts are still needed at this stage to support the new 'habitual' behaviour and therefore to confirm that is the correct option. This goes hand in hand with supporting existing users of sustainable modes to maintain their behaviour.

It should be mentioned that this process might not be linear: people can move back and forth between stages. Friends, family and colleagues can also influence attitudes and behaviour. For example, the use of environmentally friendly modes by one member of a family could lead to another member also using this mode.

The model also demonstrates how changing behaviour is a lengthy process. It therefore should be recognised in the campaign design process that one campaign cannot result in people moving from Stage 1 to Stage 7. This means that it is necessary to target a campaign at a particular stage or few stages of the model.

## **1.2 Definition of a campaign**

A campaign can be defined as:

'Purposive attempts to inform, persuade, and motivate a population (or sub-group of a population) using organised communication activities through specific channels, with or without other supportive community activities.'<sup>5</sup>

### ***1.2.1 Broadening the definition of a campaign***

The TAPESTRY project highlighted the fact that many types of campaigns are possible. Each campaign aimed to reach certain objectives, to send messages and to influence the target group's attitudes and behaviour. The campaigns developed as part of TAPESTRY covered a range of topics, such as education, vandalism, tourism mobility, public transport, health etc. However, some of the campaigns did not resemble a 'traditional' campaign, which use materials like posters, leaflets, radio or TV adverts. Rather, they evolved into new forms of communications management that combined elements of:

- Traditional campaigns
- 'Dialogue marketing' techniques
- Image or brand building
- Social & cultural events
- Educational programmes.

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<sup>5</sup> Rice R, Atkin C (Eds). 2000. Public communication campaigns, Sage Press, Thousand Oaks, California.

### TAPESTRY EXAMPLES

The campaign in **Hampshire** (UK) explored an 'interactive' marketing approach, with the particular aim of encouraging greater use of the existing rural bus services that serve 10 satellite villages around three market towns in East Hampshire. All 10 villages received at least one bus service a week; the aims were to increase awareness and use of existing services amongst existing and potential users. The area is typified by small populations, high car ownership and car usage, and a decline in local rural services.

The 'interactive' approach involved rural communities and key stakeholders playing a central role in developing marketing campaigns and communicating information about service provision through a series of focus groups.

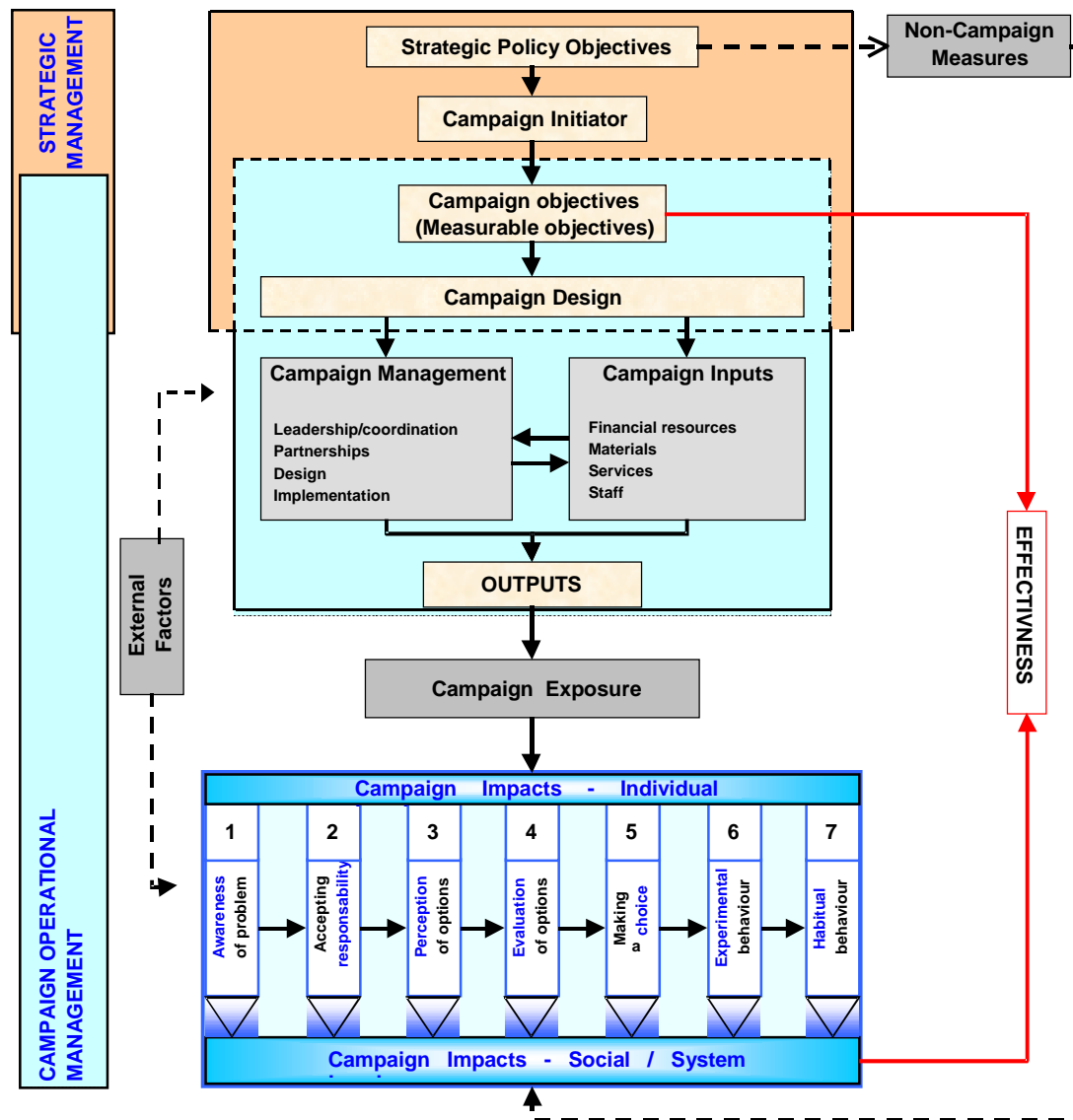
In **Rome** (Italy), pupils from schools throughout the city were targeted with a series of measures to promote the image and use of public transport. Different marketing techniques were used by the local public transport operator, including a visit to a bus depot to inform the pupils about the operations of the public transport company and the impacts of vandalism. A game on CD-ROM gave pupils the chance to play different roles in the public transport sector (passenger, driver, and person responsible for passenger services). In addition, a competition for the best drawing or piece of writing was run to stimulate a constructive classroom discussion on the issues presented during the pupils' visit to the depot. The campaign concluded with a prize-giving ceremony for the competition winners.

The campaign in **Stuttgart** (Germany) aimed to train bus drivers or other public transport employees in customer service skills so they could qualify as 'mobility advisors'. After training they were able to work on a marketing campaign, which involved talking to passengers of a particular bus line and distributing pamphlets that they had designed themselves. In addition, a dialogue marketing campaign was implemented along the bus line corridor to promote the use of sustainable modes. Interested households were sent information material on public transport, cycling and walking.

### 1.2.2 Structure of a campaign

The following figure represents the elements of a campaign set out in two overlapping categories: strategic management and campaign operational management. Each element is explained in more detail below.

**Figure 1.2: Campaign / Communications Management & Assessment (CCMA)**



## Strategic Management

### Strategic policy objectives

Each campaign should be developed and implemented in the context of wider, strategic policy objectives. These may include broad objectives set out in a local transport plan or strategy, or in regional or national government policy, such as to reduce congestion and emissions, to improve health, or to enhance road safety. These wider policy objectives will steer the campaign objectives and any more specific measurable objectives for the campaign in question.

### Campaign initiator

The campaign initiator is the person or institution that takes the initiative to set up a campaign. The initiator is part of the process of transforming general policy objectives into campaign objectives and the more specific measurable objectives.

### Campaign objectives

For each campaign, specific objectives need to be defined in the light of the broad policy objectives for the city or region in which they are to be implemented. They make clear what the responsible organisation wants to realise by launching this campaign, and the population group(s) to be targeted. Target groups can be very large, e.g. the general public, or very specific, e.g. the pupils of a certain school.

Campaign objectives can be formulated in terms of all stages leading to behaviour change (see Figure 1.2 for more details), however they are usually formulated in terms of awareness (e.g. improvement of the awareness of air quality problems), attitudes (e.g. attitudes to travelling by bus), and behaviour (e.g. increasing public transport use at non-peak times). Because most campaigns seem to have one or more objectives relating to attitudinal or behavioural change, TAPESTRY tried to assess which types of the campaigns studied were more effective at encouraging the use of sustainable transport. Wherever possible, these objectives should be measurable: for example, “in 2010 at least 90% of the Belgian population will throw its glass in the bottle bank” rather than the more vague statement, “in the coming years more people should be aware of environmental problems”.

Sometimes, the initiator does not have all the information necessary to formulate realistic measurable objectives. However, it is crucial to be aware that without them it can be extremely difficult (if not impossible) to assess the effectiveness of a campaign.

### Campaign Design

This is one of the most important parts of conceiving a campaign, as it is at this stage that decisions are made about several issues: the target audience(s), the campaign type, the sort of messages to be used etc. At this stage it is important to keep the campaign objectives firmly in mind.

Due to the growing complexity of this type of communication initiatives, one of the crucial steps is to choose the right campaign team.

### Non-campaign measures

Campaigns should not be considered as independent events. When campaigns are part of or linked to a wider programme of other measures, either hard or soft, they are more likely to have a significant effect. Because of this potential influence on the results and impacts of the

campaign, these ‘non-campaign measures’ are integrated in the CCMA (Figure 1.2). A new bus service, a free car pool database, or police action on vehicle speed may all have a marked effect on the attitudes and behaviour of the public and therefore on the campaign results. Anyone assessing the effectiveness of the campaign should be aware of the relation to, and the effects of, other measures and should take these into account when measuring the effectiveness of the campaign.

#### External factors

External factors can have a marked effect on the results of a campaign. These effects can be either positive or negative. For instance a change in legislation on maximum traffic speeds may alter the effect of a road safety campaign for the better, while a public transport strike would be likely to have significant negative effects on a pro-bus campaign.

Due to the possible effects associated with non-campaign measures and external factors, a flexible management strategy is needed, coupled with appropriate monitoring, as such effects can jeopardise the entire communication initiative.

### **Campaign Operational Management**

The blue section of Figure 1.2 comprises all the activities classed as campaign management. This includes any activities by the campaigning organisation to try to meet the campaign objectives.

#### Inputs

The nature of the campaign will be determined to an important extent by the available inputs. These will probably be fixed from the start (the main working budget), but a part of it is variable, such as supplementary sponsorship. These can be additions to the budget, in-kind contributions, such as gifts and free use of material, infrastructure and services, or contributions made by staff and volunteers working on the campaign.

#### Campaign Management

To explain fully why a technique has been successful or not, factors relating to the management process must be examined. Examples to consider include: how key actors involved in the campaign related to one another; the way information was distributed; and the way in which the public was involved in the campaign’s development.

#### Outputs

The inputs, combined with what happens during the management process, lead to certain ‘material’ outputs. These can be publicity outputs, such as posters, leaflets, or radio adverts; or events or ‘happenings’. The outputs can be compared with the inputs, a comparison which tells us something about the **efficiency** of the campaign when comparing it to the results of other campaigns.

#### Campaign Exposure

Campaign exposure is the term used to describe the extent to which the target audience have actually seen (or heard) the campaign messages. Traditionally this is measured through campaign recall, which tests whether someone can remember or recognise the elements of the campaign. However, people may be exposed to campaign messages and take in the information in their subconscious memory, but not consciously remember it. They then may go on to modify their awareness, attitudes or behaviour, without being able to recall the campaign messages. This means that measuring the extent to which the campaign reached

the target audience can be difficult. Nevertheless, measuring the level of campaign recall should always be measured. This includes both recognition of the campaign and recall of specific messages.

### Campaign impacts

Campaign impacts fall into two broad categories:

- The first concerns changes in levels of awareness, attitudes or in the travel behaviour of individual travellers that make up the target group – **Impacts at the Individual Level**.
- The second includes more aggregate impacts on the transport system, such as on congestion, air quality, noise and accidents – **Impacts at the Social / System Level**.

By comparing the impacts of the campaign with the campaign objectives (or operational targets), the **effectiveness** of the campaign can be assessed.

Assessment of the Social / System Level impacts can be (relatively) easily carried out if the measurable objectives have been correctly formulated (see the ‘Campaign objectives and measurable objectives’ paragraph) and control areas have been monitored. However, the assessment of the impacts at the Individual Level poses some difficulties.

Even if campaigns have been set clear objectives, very often they end up having more effects than foreseen. This suggests that it would be helpful to have a set of questions especially designed to measure the seven stages of change, (covering awareness, attitudes and behaviour) before and after the campaign, thus giving a clearer picture of its real impact at the individual level.

In addition, some campaigns arouse the interest of politicians and other decision-makers and this occasionally results in a public debate, or in new legislation. These kinds of results cannot be measured in the same way as the direct impacts of a campaign, but are worth taking into account in the overall assessment of a campaign.

## **1.3 Investment in campaigns**

The question of whether campaigns are cost-effective and therefore worth the investment is one of the most important for any potential campaign initiator, such as national, regional or local authorities, and public transport operators. This section briefly outlines some examples that demonstrate the financial benefits of a successful campaign.

### ***1.3.1 Are campaigns worth the investment?***

For a properly managed campaign, even a small-scale one, to have an impact, it requires at the very least its own budget and often significant levels of funding. However, campaigns have the potential to repay the investment required in three ways:

- They can help maximise investment in new services and infrastructure (public transport, car-sharing, car-pooling, cycling and walking)
- They can boost public transport patronage and therefore overall revenue
- They can help minimise the social and environmental costs of traffic growth.

Campaigns can help to maximise investment in new services and infrastructure. A publicity campaign should ensure that a larger number of potential users are made aware of the benefits of the new services on offer, and so boost their use. Some campaigns targeted to increase public transport revenue have been demonstrated to be cost effective. In Leipzig-Grünau, an Individualised Marketing campaign was applied to all 76,000 inhabitants. The results were evaluated by analysing ticket sales. The cost of the campaign was the equivalent of around 527,000 Euros. The total increase in ticket revenue in the first year after the Individualised Marketing campaign was around 537,000 Euros. Therefore, the campaign paid for itself within one year, and thereafter increased revenues for the public transport operator<sup>6</sup>. By taking into account the wider outcomes of the campaign, the marketing activities were seen to be an investment, not a cost.

Such campaigns can benefit a range of modes. An Individualised Marketing campaign was run to promote all environmentally friendly modes in South Perth. In an extensive cost-benefit analysis, external costs were also included and a 'total' cost-benefit ratio was calculated. The cost-benefit ratio calculated for this pilot campaign was 1:13 and for the large-scale application 1:30. Not only were the investment costs recouped through social benefits, but additional revenue was also obtained<sup>7</sup>.

A further reason why campaigns are worth the investment is that they help to minimise environmental and social costs caused by car traffic. If more people are using environmentally-friendly modes as a result of campaigns, and are at the same time reducing their own car use, the costs of congestion, poor air quality, community severance and casualties are reduced. These types of costs were considered in the cost-benefit-analysis for South Perth, as mentioned above.

### **1.3.2 Monitoring and assessment**

In order to understand whether a campaign has been effective, it is necessary to carry out some form of monitoring and assessment. This is essential to be able to justify investment in campaigns. A rigorous monitoring and assessment process is particularly important when launching a new approach or when a campaign has been run for the first time. Monitoring and assessment should be considered at the beginning of the campaign planning process to determine the most appropriate methods to measure the effects of the campaign.

The process should aim to look at all the elements in the Campaign Management Structure (see Figure 1.2). This is particularly important when a project has failed, so that the factors at fault can be correctly identified. In addition, it is essential that not only is behaviour change measured, but also any changes in the preceding stages, such as awareness, perceptions and intention.

TAPESTRY Deliverable 3 sets out a set of detailed campaign assessment guidelines which can be followed or adapted to a wide range of situations. This section covers some of the content of that deliverable but is by no means comprehensive and the reader should refer to Deliverable 3 if more detail is required.

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<sup>6</sup> Werner Brög: Return on Marketing Investments – Illustration with Examples. Papers presented at the UITP Training Programme for Public Transport Managers: Leipzig, January 2003, page 27.

<sup>7</sup> Werner Brög: Return on Marketing Investments – Illustration with Examples. Papers presented at the UITP Training Programme for Public Transport Managers: Leipzig, January 2003, page 41.

## 1.4 Linking with other initiatives

Sometimes it is possible to integrate or link campaigns with other initiatives to increase any potential impacts and synergies, as well as gain a higher level of acceptance among the population. This section considers scope for 'horizontal' and 'vertical' integration.

### 1.4.1 Possible alliances ('horizontal integration')

To increase the success of a campaign, it is sometimes an advantage to link it with other related activities initiated by local or regional authorities, public transport operators, NGOs etc. Such co-operation can lead to greater impacts. For example, a good campaign can convince commuters not to use their car to travel to a neighbouring city, but to use public transport instead. In this case, the introduction of a special season ticket valid in both cities, plus an associated promotional campaign, would be beneficial for both cities. Potential partners for such a campaign could be the local authorities in both cities (which are either the destination or origin of the commuting trips) and the respective public transport operators.

These alliances have the advantage that both partners are able to reach the same objectives. Co-operation between cities or organisations also demonstrates the importance of the subject of the campaign. There is tremendous scope for alliances. For example, health promotion organisations could support campaigns that promote cycling or walking, which both bring health benefits. A successful campaign to promote sustainable modes of travelling to and from school means less congestion for the school in question. A campaign targeted at local businesses promoting more efficient ways to get staff and goods to the workplace not only benefits the businesses themselves, but also helps cut down traffic.

### 1.4.2 From the local to national level ('vertical integration')

Sometimes there are national or regional government-led programmes that provide a good basis for campaigns. For example, Local Agenda 21 has given the impetus to many local authorities and NGOs to initiate campaigns. As Local Agenda 21 is generally well known, it can lead to campaigns being better accepted and therefore having a greater potential to change behaviour. Each tier of government has the potential to influence the levels above or below. Vertical integration has the advantage that there is a common spatially-nested approach. This means that national governments, regional and local authorities are working together and are therefore more credible.

There are different examples from TAPESTRY that demonstrate links between the local and national levels. For example, in France the public transport operator in Nantes linked their 'Car-Free Day' to the French national campaign and the overall EU European Mobility Week campaign. In Constanta (Romania) a campaign was developed to persuade tourists to use public transport at their holiday destination. This initiative was linked with a national publicity campaign.

## 2 POLICY / STRATEGIC LEVEL CONSIDERATIONS

### 2.1 Why should we consider the policy and strategic level?

Campaigns are rarely implemented in isolation. Usually, they are combined with other ‘soft’ and/or ‘hard’ measures, in coherent policies or strategic plans. These plans, developed at local, regional or even national level, set general strategic objectives and aim at the effective and efficient co-ordination of all efforts for the fulfilment of these objectives. In almost every case, this process requires explicit or implicit changes in travel attitudes or behaviour. In addition, the integration of a number of complementary measures strengthens their overall impact; enhances the chances of success; and supports lasting impacts. For example, a campaign that promotes the image of public transport is bound to have higher chances of success when combined with significant improvements in the quality, frequency and reliability of services.

The broader policy/ strategic objectives should be taken into consideration in the process of campaign design and implementation for the following reasons:

- Strategic objectives determine the general framework (or ‘strategic environment’) within which a campaign needs to be developed and implemented.
- Campaigns are expected to contribute towards the achievement of specific policy objectives. Campaigns whose objectives are not in line or, even worse, are at odds with policy objectives are bound to fail. This means that the mapping of policy and campaign objectives is a prerequisite for a successful campaign initiative.
- By ensuring the alignment of policy and campaign objectives, a long-term and integrated view can be achieved. A campaign run in isolation from policy objectives is more likely to have a limited lifespan and reduced effectiveness. However, when linked with a broader policy plan, campaigns become a part of a long-term, balanced and structured programme.
- As highlighted in Section 1.4, there is an opportunity for synergies with other related policy fields, such as public health. The integration of a campaign within a broader policy plan and the exchange of experiences with respective actors from other fields may result in synergies. These can refer not only to impacts on behaviour, but also to managerial or technical issues.
- Often policy-makers stipulate a requirement for campaign measurement and assessment to help future planning.

### 2.2 What are the most common categories of objectives at the strategic level?

Travel awareness, environment and health campaigns are usually undertaken to support the fulfilment of policy objectives. The most common types of objectives that can be assisted by a campaign include the following:

**Traffic Levels:** The reduction in the number of trips made by private car and the avoidance of unnecessary traffic are the prime objectives of almost every transport plan, especially in urban areas.

**Road Safety:** This category of objectives addresses issues such as the enhancement of road safety through reducing crashes and casualties involving road users. The promotion of cycling and walking as safe means of transport, and the support of the concept of safer routes to schools, are examples of road safety related issues.

**Modal Shift:** This type of objective involves encouraging people to shift from the private car to other modes of transport. This can encompass reducing traffic growth and the proportion of single occupancy trips; generating acceptance of the need for a major change in public attitudes to methods of travel; promoting car pooling and ‘park and share’ arrangements.

**Environmental issues:** These objectives address air pollution (particularly NO<sub>x</sub> emissions) and high noise levels, as well as climate change and the greenhouse effect. They include motivating people to travel by environmentally sustainable and friendly modes, and to replacing motorised with non-motorised modes.

**Health:** Common health-related objectives are the reduction of heart disease, obesity and respiratory disorders, and the promotion of cycling and walking as healthier means of transport.

**Accessibility:** This category includes the improvement of facilities for mobility-impaired and disabled people; the provision of equal access to mobility for everyone; and the elimination of social exclusion for those groups who have difficulties in accessing transport services.

**Other:** Other objectives that can be achieved through campaign initiatives are those related to issues such as sustainable development, regional development, reclaiming public space from the car, or the creation of equal transport systems.

### TAPESTRY EXAMPLES

The TAPESTRY case studies were based on a variety of policy objectives. For example:

**Traffic Reduction:** The campaign in **Geel and Mol** (Belgium) was developed in the context of the Flanders Mobility Covenant Programme. This is an instrument for sustainable local policy planning formed in partnership between the Flemish Government, local authorities, the Flemish public transport company, and traffic generators such as schools. This particular campaign aimed among other things to contribute to “*reducing the number of trips made by private car*”.

In contrast, the **KOMIMO** (Belgium) campaign aimed to “*guarantee accessibility to the city centre*”, which is set out as a strategic objective in the Policy Agreement 2002 of Mechelen Town Council.

**Road Safety:** The campaign implemented in **Gävle** (Sweden) intended to contribute to “*reducing accidents involving pedestrians, cyclists and people on their way to/from and during a public transport trip*”, an objective set by the National Road Administration and the local authority/ technical office. At a national level, the National Road Administration has a

long-term objective, called ‘zero vision’, which is to reduce the number of people killed in road accidents in Sweden down to zero.

**Modal Shift:** The **Nantes** (France) campaign was developed in the context of the overall objective for the Nantes urban area, which is “*to reach a 17% modal share for public transport in 2010 compared to 14.8% in 1998*”. This objective was set out in the “Plan de déplacements urbains” (Pdu), adopted after public consultation at the end of 2000. The urban public transport company, Semitan, also has a number of policy objectives such as “*to increase the number of passengers per annum from 84 million to 100 million by 2010*”, and to launch “*promotional and advertising campaigns aimed at changing attitudes towards public transport*”.

**Environmental issues:** Apart from reducing car trips, the **Geel and Mol** campaign intended to “*increase incentives and motivation to travel by environmentally sustainable modes of transport and reduce the necessity to own or travel by car*”. This objective is also laid out in the Flanders Mobility Covenant Programme.

**Health:** Among the aims of the **Gävle** campaign was to contribute to “*improving people’s health, specific conditions, and blood pressure levels*”. This objective is set by the County Council of Gavleborg in accordance with the National Public Health Committee’s 18 health policy goals to be reached by 2010.

**Accessibility:** One of the policy objectives on which the **KOMIMO** campaign was based was to “*provide equal access to mobility for everyone*”, which is also a strategic objective in the Policy Agreement 2002 adopted by the Town Council of Mechelen.

**Other:** The campaign developed in **Hampshire** (UK) aimed to contribute to “*supporting the local economy/local businesses providing local employment and reducing the need to travel*” laid out in several Hampshire County Council policy documents.

### 2.3 Who could be the initiator at the strategic level?

Depending on the institutional framework and cultural aspects (familiarity, expertise, competencies etc), strategic level initiators can be:

- **Policy makers (national, regional and local authorities, etc).** Public authorities are the institutional bodies that have responsibility for formulating long, medium and short-term policy plans; for setting broad objectives; and for initiating or encouraging the undertaking of particular initiatives. Common initiators are various ministries and governmental agencies at national level (e.g. ministries of transport, land use or the environment) or prefectures and municipalities at regional and local level respectively. It should be noted that the involvement of each strategic initiator varies among different countries according to the degree of decentralisation and the issue in question. However, there seems to be a trend towards the active mobilisation of local authorities, which started several years ago in some European countries and is now expanding to others.
- **Networks and Platforms.** There are a number of networks and platforms interested in sustainable transport. They act as a forum for representatives from EU member governments, local and regional authorities, researchers, employers, transport operators

and other user groups. Their main purpose is to promote sustainable transport policies and practices, including those related to mobility management, to transfer knowledge, and to motivate decision makers at various levels. Their activities, coupled with increasing numbers of participants, have advanced their role within the European Union. POLIS, Eurocities and EPOMM are examples of this category.

- **Non-Governmental Organisations (NGOs), International/ National Organisations.** NGOs, particularly those interested in environmental problems but also those involved in health promotion, can function as a lever for a campaign at the strategic level. Common initiators of this type are the WHO (World Health Organisation) and national health organisations. This category also involves lobby and pressure groups, such as the WWF (World Wildlife Fund) and VCO (Verkehrsclub Österreich – Austrian Club for Transport and Environment) that play an important role in the decision-making and discussion process at many levels of transport policy. Apart from their role in launching national level initiatives and acting as pressure groups, NGOs cultivate cross-sector partnerships, co-ordinate and support local initiatives, and often act as an ‘umbrella’ for a programme of local initiatives. A good example is Sustrans in the United Kingdom, which is well known for its work on building and promoting the National Cycle Network and the Safe Routes to School programme.
- **EU organisations.** The European Commission is actively interested in mobility management in general and in campaign initiatives in particular, and encourages their development through the implementation of relevant EU projects, as well as through the funding of demonstration studies. It also promotes networks and platforms and financially supports their activities in various ways, such as through competitions and prize awards. In addition, the European Commission backs the transfer and dissemination of innovative and successful initiatives such as the ‘In town without my car!’ day and European Mobility Week.
- **Public transport operators.** Public transport operators can be initiators at both the strategic and campaign levels. At the higher level, they try to influence decision makers and form strategic alliances with other involved, or potentially involved, actors. In many cases, public transport operators are owned by local authorities and therefore have to share their objectives.

### TAPESTRY EXAMPLES

Strategic level initiators within TAPESTRY project included:

- **Policy makers at the local level.** For example, the campaigns implemented in **Hampshire** and in **Hertfordshire (UK)** were initiated by the corresponding county councils.
- **NGOs.** The Belgian campaign, based on the Week of Soft Road User and on Public Transport Week, was initiated by **KOMIMO** (Komitee Milieu en Mobiliteit or Committee for Environment and Mobility). KOMIMO is a non-governmental, non-profit organisation founded in 1987 by organisations active in the sector of the environment and/ or mobility, to co-ordinate their efforts. The organisations that form KOMIMO are mostly lobby groups: the federation of train, tram and bus users (Bond van trein- tram en busgebruikers), the federation of cyclists (de Fietsersbond), a centre for mobility management (‘Langzaam Verkeer’), a carpool centre (Taxistop), the pedestrian movement (de Voetgangersbeweging) and the

federation for a better environment (Bond Beter Leefmilieu).

- **Public transport operators.** The public transport company Semitan, commissioned by the local authority to operate the bus and tramway network, was the initiator of the campaign implemented in **Nantes**, and the campaign in Dublin (Ireland) was led by **Dublin Bus**.

## 2.4 From strategic to campaign objectives

In the campaign design and implementation process (shown in Figure 2), there is an area relating to the definition of campaign objectives which lies in the overlap between strategic and operational management. One of the main responsibilities of the campaign initiator is to transform general policy objectives into campaign objectives.

As highlighted in the first chapter, the process of changing behaviour is not a quick one, and it is unrealistic to believe that just one campaign can have an effect dramatic enough to fulfil one or more policy objectives. Each campaign should set more specific objectives – stating what is to be accomplished through campaign activities for whom, by when, and where. The campaign objectives encompass the fundamentals of the campaign, and should be taken into account during every phase of its lifetime. The objectives must in turn be consistent with the strategic/ policy objectives.

An important element of the definition of campaign objectives is to determine the target group(s) at which the campaign is directed. The definition of target group(s) requires the participation of the campaign manager and is described in the next chapter.

Depending on which stage in the process of behaviour change the target group is estimated to have reached, campaign objectives can be formulated in terms of raising awareness, changing attitudes, or changing behaviour. Taking this into account, it can easily be seen that campaign objectives can be defined both in terms of results (e.g. increase in public transport patronage) and in communicative terms (e.g. increase of awareness about the environmental pollution that is caused by private car use).

Wherever possible, campaign objectives should be measurable, i.e. quantified, and share as many as possible of the key characteristics that are described by the acronym ‘SMART’:

- **Specific.** Campaign objectives should be written and expressed in clear, simple terms so that all parties involved understand exactly what they are trying to achieve.
- **Measurable.** Campaign objectives should be measured precisely and accurately (quantified). This determines if and when the objectives have been achieved.
- **Acceptable.** Campaign objectives should be shared and backed by all the involved parties.
- **Realistic.** Campaign objectives should be attainable. Setting unrealistically high or low expectations leads to poor results.
- **Time related.** Campaign objectives should specify a time frame for their accomplishment.

## TAPESTRY EXAMPLES

### **Campaign in Geel and Mol**

These are not very good examples as none of them are 'smart'.

The objectives of the campaign developed in Geel and Mol were classified and defined as follows:

Main objective:

- To increase the targeted schools' awareness and acceptance of the role they can play in encouraging home-school trips by sustainable modes; and getting them to participate in doing so.

Supporting objectives

- To build the active support of schools for the development of a local mobility plan to implement the new educational goals in school;
- To increase awareness of the dangers on the road and the negative impacts of cars on the environment;
- To increase school accessibility by encouraging children to walk, cycle or take public transport to school safely, with a view to continuing this behaviour into later life;
- To increase safety at the school gates and on the main routes to school;
- To stimulate new partnerships.

Operational target:

- Each participating school could decide on its own priorities and was invited to define its own operational targets, e.g. 5 % reduction in the number of pupils aged 9-12 driven to school by the end of the campaign (November 2002).

### **Campaign in Rome**

The objectives of the Rome campaign were:

- To examine how to influence the attitudes of a target group towards traffic and pollution problems as well as vandalism
- To reduce vandalism
- To reduce ticket-less travel/ fare evasion
- To increase respect for passengers on public transport
- To enhance the perception of public transport staff
- To modify future behaviour towards a reduction in the use of private vehicles
- To increase the use of public transport and public vehicles
- To draw attention to the environmental impacts of transport use.

### **Campaign in Nantes**

The objectives of the campaign developed in Nantes were set out as follows:

Marketing objectives:

- The overall marketing objective was to increase the number of people using the bus on a specific route. The campaign targeted only those trips made towards the city centre for shopping and leisure reasons.

Communication objectives:

- To encourage people to think about their own travel behaviour when going to the city centre for shopping or leisure purposes.
- To accelerate a change of behaviour by focusing on leisure and shopping journeys towards the city centre.

### **Dublin Bus Campaign**

For the Dublin Bus campaign, the problem was that a particular bus route, number 27, was suffering from poor passenger behaviour, including drinking, eating, smoking and vandalism, and this was believed to be affecting patronage levels. Damage to the bus was caused by children aged 8 upwards. Therefore, the campaign objectives were:

To reposition the bus/ service in the minds of children so that they would respect the mode, leading to:

- Reduced damage levels
  - Perception of a safer environment
  - Greater use by off-peak travellers
- To reposition the bus/ service in the minds of bus users and potential users so that they
- Would feel safer
  - Perceive the bus as a safe and pleasant mode of travel
  - Use the bus as much as their travel wishes dictated and not be intimidated.

## **2.5 Strategic partnerships**

A strategic partnership involves the co-operation of multiple stakeholders interested directly or indirectly in sustainable transport. While the contribution of strategic partnerships is widely recognised and accepted, their role varies according to cultural, legal and institutional conditions.

Building up a strategic partnership is a demanding but worthwhile task, as it leads to win-win situations where all parties involved get some benefits. It is likely that a campaign backed up by a strategic partnership will gain higher levels of acceptance and commitment and therefore have a better starting point than one that is supported only by its initiator. Ensuring a strategic partnership does not guarantee the campaign's success but can undoubtedly facilitate it throughout the whole campaign process.

Some of the benefits that can be achieved through strategic partnerships are as follows:

- Reduction in overlapping activities
- Transfer of knowledge and expertise
- Efficient allocation of resources
- Social support and public involvement
- overcoming potential barriers from opponents
- synergetic effects and added value

A strategic partnership can either be formal (written agreement) or informal and can be based on a broad transport policy plan (national, regional, local) or on a specific mobility strategy/ programme. In formal partnerships, the various stakeholders have already proved their willingness to participate, have discussed thoroughly their (common) concerns, have made some important steps in communicating with each other and, most importantly, have explicitly agreed on their objectives, plans and desired outcomes. However, building up a partnership through a formal agreement often presupposes the familiarity of stakeholders with this kind of arrangement and requires a substantial amount of time. Informal partnerships are more flexible and may be a promising starting point in countries without any previous experience. Furthermore, in partnerships based on a broad transport policy, partners commit to act according to the policy plan, whereas in the case of partnerships based on mobility programmes, partners have a more concrete action plan and relevant objectives. Generally speaking, a strong partnership sets the general framework and the role of each partner, and secures the commitment and the on-going interest of the involved parties.

As has already been underlined, building up an effective partnership requires a lot of effort on behalf of the parties involved. The most common traits that a strong partnership should share are as follows:

- Understanding of mutual concerns, motives, goals and objectives
- Strong commitment
- Clear roles and responsibilities
- Effective communication among partners
- Credibility of resource allocation and management
- Willingness to overcome barriers and a spirit of cooperation
- Well-structured organisation

## 2.6 Funding

Funding is considered to be among the most important prerequisites for the timely and sound implementation of a strategic plan. The usual process is to produce an estimated budget, depending on the scale and type of campaign to be carried out, which is then used to secure contributions from each financial supporter.

In many cases, resource allocation takes place during the development phase of the transport plan, with funding being secured for a package of complementary measures including campaigns. In this situation, campaigns may have to ‘compete’ for funding with other initiatives, including ‘hard’ measures. This can create problems as campaigns are generally more difficult to assess, and hard measures may be seen to be more cost-effective in the short-term.

In addition to monetary contributions, participants may often make ‘in kind’ contributions, including providing ‘free’ staff members, or access to print or publishing facilities. It is quite common for one or more strategic partner (e.g. the strategic level initiator) to be the joint fund providers, which can be useful when the required financial resources are substantial or cannot be provided by one party. Joint funding does, however, demand a great deal of effort to co-ordinate and monitor. In addition, private sector companies may contribute financially when they perceive they will enjoy direct benefits, such as improved brand recognition or association with the campaign’s image or objectives.

Finally, it is worth pointing out that securing an adequate level of funding does not guarantee the campaign's success. There are numerous examples of expensive failures and cost-effective successes.

#### TAPESTRY EXAMPLES

- **Funding the Geel and Mol campaign.** This campaign was financed by the municipalities of Geel and Mol with co-funding from the European Commission and the Flemish Government. Both municipalities were also supported financially by the 'Levenslijn' (Lifeline) campaign. In addition, in Geel some parts of the campaign were sponsored by a group of very large private companies that sometimes had a second (hidden) agenda, such as improving their image.
- **Funding the seminar for cycle trainers in Vienna.** This part of the campaign was locally co-financed by the Austrian Federal Ministry for Education, Science and Culture. The local co-financier was an insurance company, AUVA (Allgemeine Unfallversicherungsanstalt), which is interested in accident prevention, as it insures all educational institutions in Austria.

### **3 CAMPAIGN MANAGEMENT AND THE CAMPAIGN MANAGER'S ROLE**

Whilst an assessment of the campaign objectives, outputs, exposure and impacts give indications of the effectiveness and efficiency of a particular campaign, it cannot explain fully why a campaign has been successful or not.

A great deal of the success of the campaign is likely to depend on the quality of the management system put in place to direct it. Organisations running campaigns need to establish an appropriate and effective management system – just like any organisation, whether from the public or private sector. At the heart of the management system is the campaign manager, who is crucial in determining whether the campaign succeeds or not.

In this section the following aspects of operational campaign management and the campaign manager's role are addressed:

1. Putting objectives into practice
2. The campaign team
3. Target audiences
4. Partnerships
5. Operational campaign programme
6. Advertising press and PR
7. Learning lessons

These aspects are stepping stones to best practice in campaign management and, although their application may vary considerably according to individual campaign settings and circumstances, they make a significant contribution to the success of a campaign.

#### **3.1 Putting objectives into practice**

The campaign initiator usually takes the lead in setting strategic policy objectives and deciding on the overall campaign design. Once these issues have been decided upon, the campaign manager will take the lead in operational campaign matters. The campaign manager has the crucial role of turning theory into practice.

##### **'Step-by-step guide'**

#### **Step 1. Interact with your campaign initiator about objectives**

The campaign initiator should discuss campaign objectives with the campaign manager before the campaign starts. Policy objectives set by the campaign initiator have to be fine-tuned to the specific campaign setting and its target audience – taking into account contextual, social or cultural issues. It is critical that the campaign manager is able to translate the theory into practice that will be appropriate for real-life situations.

**Step 2. Once the policy objectives and campaign type have been decided upon, select clear measurable campaign objectives and introduce these into a work plan**

Setting the right objectives is one of the main challenges for campaigns. The Seven Stages of Change model (see Figure 1.1) is useful at this stage, to determine the appropriate level and type of intervention. The initial stages in the model require more general awareness-raising activities, aimed at the general public, while those in the later stages (that aim to change perception and then behaviour) need to work with smaller groups and defined journey types.

Wherever possible, these objectives should be measurable – whatever stage is chosen as the campaign focus. They might focus on measurable outcomes such as numbers of passengers, or on communication targets such as providing 60% of customers with easy-to-use timetables. These are customer-oriented outputs and outcomes, which direct the campaign toward the needs of the target group.

**Step 3. Use these objectives as leading principles throughout the campaign**

Campaign objectives should be the leading principles throughout the campaign. The role of the campaign board and campaign manager is to steer the operation towards achievement of its objectives. All progress reporting and final evaluation should reflect upon the initial objectives.

**Step 4. Develop a clear assessment framework to measure the impact of your campaign and create the right conditions for assessment**

The campaign board and manager or an independent evaluator should be responsible for developing a clear assessment framework, to enable the assessment of the impacts, inputs, outputs and process of the campaign.

It is always preferable for monitoring and assessment to be conducted by an independent assessor. However, in smaller campaigns with low budgets, evaluation is often the manager's role. The challenge for the campaign manager in this situation is to remain as objective as possible about the success of the campaign, to ensure that as much as possible is learnt for the future.

**Step 5. Don't mix objectives with measures and tools**

Whenever campaign design and campaign activities are selected, there is a tendency for the campaign team to adopt them as leading principles. Activities such as design and development of materials or organisation of events often take a lot of energy and budget, and they therefore become objectives in themselves. Campaigners often get lost in the detail and forget about the rationale behind these actions. A mid-term review of objectives and measurable targets is therefore critical. Ideally, this would also be carried out by an independent assessor to ensure objectivity.

## TAPESTRY EXAMPLES

### **KOMIMO - Differentiation between objectives at the strategic policy and campaign levels**

#### *Objectives at the strategic policy level (selection)*

The overall objective of the Week of the Soft Road User and Public Transport Week is the promotion of sustainable transport modes. The main goal is to promote a positive image of the alternatives to the car: cycling, walking, public transport or other collective modes of transport (e.g. carpooling and car sharing).

#### *Some specific campaign objectives (selection):*

- To create a positive attitude towards sustainable modes of transport (walking, cycling, public transport, car sharing) among the general public;
- To stimulate debate about mobility issues among policy makers;
- To create a positive attitude towards sustainable transport modes among policy makers;
- To stimulate new ideas and introduce innovative concepts among policy makers

#### *Objectives for the campaign level itself:*

- To gain media-attention;
- To achieve the participation of local authorities and other organisations in the campaign;
- To stimulate public debate.

Another important aspect of the campaigns was that much attention was given to the creation of networks. The forging of partnerships between the different actors involved in mobility (non-profit organisations, governments, administration, interest groups etc.) is considered crucial for the development of a sustainable mobility culture.

### **School campaigns in Austria**

- “The Austrian school case studies were designed according to the principles of **action research**... The objective is to trigger a change in travel behaviour and in underlying processes.”
- “By engaging young people in contemporary transportation issues and identifying the problems and dangers associated with traffic, it is hoped that future travel behaviour will be influenced and many long-term transport safety and sustainability goals will be achieved.”
- “It is clear that participation in a single project does not lead to drastic macro changes in future mobility, but as it is a very first **demonstration project**, the main purpose has been to show how it can be done, how it should be done and what can be achieved with the effort made.”

### 3.2 The Campaign Team

Whenever campaign objectives are set and a campaign design is chosen, the campaign manager has to determine the set of competencies needed and to appoint and co-ordinate the right campaign team.

#### Step 1. Define the skills and competencies needed in your team according to the selected campaign design

Different types of campaign require different types of campaign teams. As the TAPESTRY campaigns covered various campaign types and packages, it became obvious that a variety of skills and competencies were needed within any single team.

The campaign manager has the leading, co-ordinating role in defining and selecting the balance of skills needed for the campaign type selected. In smaller or low budget campaigns, the campaign manager will have a general ‘do-it-all’ profile, with a small team and fewer responsibilities for contracting out tasks. In a more complex campaign type, the manager will have a bigger responsibility for project management and co-ordination.

Table 3.1 matches some common campaign skills and competencies against tasks.

**Table 3.1: Matching Campaign Tasks with Skills**

Level	Competencies / skills	Tasks
Campaign Management	Communicator Strategist Co-ordinator Assessor Coach	Reporting Strategic plan Work programme Advice Support and team building
Production of campaign materials	Creative Designer	
Finance and accounting / Administration	Administrator	Support and financial advice
Market research	Marketer	Surveys – market analysis
Distribution of campaign materials	Organiser	Distribution
Press relations	Communicator	Press briefing

#### Step 2. Define and allocate specific tasks

Once the team has been formed, the next step is to allocate clearly specific tasks to each team member. These need to reflect the skills and competencies of each member, as well as their most appropriate level of responsibility. Ideally, an individual’s past level of experience determines the level of responsibility, with some allowance for personal and professional development.

In setting clear, measurable objectives for each team member, it can be helpful to produce an overall work plan, timetable, or project schedule. These connect the activities with each other and help team members visualise the approach that has been chosen for the whole campaign, and the ‘critical path’ that needs to be followed.

### Step 3. Co-ordinate and provide feedback on the work done

For this step, it is very important that the team members always keep in mind the core campaign objectives. This helps to provide focus in the event of any problems. Effective team communication is vital: it is advisable to:

- Hold regular internal briefings
- Adjust tasks when necessary
- Discern priorities
- Make team members co-owners of the campaign
- Give face-to-face feedback to team members.

#### TAPESTRY EXAMPLES

##### School campaign in Geel, Belgium

A key success factor for the campaign in Geel was the complementary roles and competencies within the campaign team. Mrs Nele Raets, head of the planning department of the municipality, acted as campaign manager. From the very start of the campaign, she followed a target group oriented approach to facilitate the implementation of the sustainable mobility scheme in the town, and she was personally committed to the project. Langzaam Verkeer was commissioned to carry out the operational campaign, because of the long-standing tradition of its communication and training unit in working with schools on traffic issues. The LV campaigner was backed up by an LV researcher whose role was to oversee and carry out the ‘before’ and ‘after’ surveys; and by an LV planner working on the mobility scheme for the Municipality of Geel.

Municipality personnel from the traffic unit completed the campaign team.

##### School campaigns in Austria

- “The co-ordination of each Austrian school case was the responsibility of FGM, which appointed a two-person **team** to run the campaigns. An experienced trainer with educational experiences and skills co-ordinated the action research, the production and implementation of the campaign materials, and carried out the work in the field. Another FGM member took on the survey tasks and supervision.”
- “The team for the Linz campaign was stable from the beginning until the end. One success factor was the **enthusiastic commitment** to the campaign of the school’s new headmaster. The Linz campaign was also influenced by the EU MOBILE project, which had, in co-operation with FGM, successfully dealt with travel awareness-raising projects in the city.”

### 3.3 Target Audiences

Three issues need to be addressed here:

- Defining and understanding target audiences
- Sensitivity to contextual, social, cultural, mobility issues
- Interaction with target audiences

#### **Step 1: Take your time to define your campaign target audience**

In defining objectives and selecting a type of campaign, it is crucial to define the target audience. Some campaigners consider this element decisive in the success or failure of a campaign. It may be that a campaign targets several specific audiences at the same time or just one audience. Different objectives may need to be set for different types of target audiences.

#### **Step 2: Make use of or initiate market research to understand your campaign target audience**

A good pre-campaign study not only gives you a ‘profile’, or idea, of the target audience you want to reach, it can also give you a deeper insight into and knowledge about what kind of messages you should use (or avoid) with different segments of the target audience. A pre-campaign study should aim to do more than just inform the setting of objectives.

#### **Step 3: Take account of contextual, social, cultural and mobility issues in your campaign**

In every society there is always some kind of debate going on. If possible, connect your campaign to a relevant debate and explain why your campaign could be seen as a helping hand.

Connecting the campaign with topics on the agenda for your community will automatically create much more attention and interest in the campaign. A disadvantage is that the campaign might then have the potential to make more enemies than would otherwise be the case.

#### **Step 4: Create conditions to get target audience feedback**

Key elements include improving public access to the campaign outputs and services through:

- Direct contact
- Help desk facilities
- Campaign freephone facility
- Campaign website
- Mail back (or freepost) address for quick responses
- Setting up complaint handling procedures

#### **Step 5: Integrate target audience feedback into your campaign**

Once target audiences have been identified, the campaign manager has to improve openness and understanding about the needs and attitudes of the target group. Some types of campaign create interaction between the campaign team and the audience.

## TAPESTRY EXAMPLES

### **Nantes bus promotion**

The starting point was the aim to ‘increase bus patronage on a specific bus route’, but this was adjusted significantly throughout the lifespan of the campaign. The target group, the geographical zone to be covered, and the messages to be tested were all modified.

The first idea was to target residents located 300 metres from the 21-23 route and adjoining bus stops, to promote this route for all kinds of uses. Among this geographical target group would be found regular and occasional public transport users, as well as non-users. After discussion within TAPESTRY, it was decided to target the evaluation process towards:

- Only those trips made towards city centre.
- Those trips made for shopping and leisure reasons

The recipients of the campaign information were selected using the following process. A database was ordered from France Telecom containing the names and addresses of people equipped with a telephone at home, and living in the geographical area. This file contained 10,650 names and addresses. A filter was made on the walking distance (300 m) from the bus stops located on the route to be promoted. 2,450 residents were identified to receive promotional information.

### **Hertfordshire schools campaign**

The TAPESTRY campaign in Hertfordshire aimed to test whether it would be possible to identify a target group that was more susceptible to changing its travel behaviour and also able to do so. Using data from pre-existing travel questionnaires conducted by TTR (County Transport Study) and Mori (Hertfordshire Citizens Panel Survey) along with the Hertfordshire Environmental Pledge Survey (conducted by the County Council), extensive analysis was carried to determine the profile of those who were ‘environmentally aware car users’. The profile identified was:

- Female
- Within the 25-39 age group
- Working
- Owner occupiers
- Were more likely to have children under 16

Focus group discussions were then conducted by MORI to gain a better understanding of the ‘Environmentally Aware Car User’ target group, members’ motivations, and what factors might make them alter their travel behaviour. This information then formed the basis for a targeted campaign, using some of the messages found to be appropriate for this group.

### Schools campaign in Austria

The **official mascot**, used in Austrian traffic education for more than 25 years, is ‘Helmi’. His message was: “Protect yourself, watch out, be careful, don’t ride without helmets...” In the traditional Helmi adverts, the main focus is laid on the car and other modes play a passive role. This rather old-fashioned role model did not fit in with our campaign, so the need for a new mascot was born and fulfilled with the creation of the Urban Troll. For the materials for children we tried to use **new identification figures** like the Urban Troll, who encourages children to go by bike or on foot. Urban Troll says: “You can change the system, these are your rights in traffic!” This Urban Troll figure does not lay down traffic rules: it wants children to become aware that they can bring about a change in the existing traffic system.



The schools in Linz and Graz and the kindergarten in Graz were located in areas with a high share of people with a non-Austrian mother tongue. This made it more of a challenge to get the campaign messages across. Campaign materials like the **brochures** were also produced in **foreign languages** (Turkish and Slovenian), as were the **questionnaires**, which enhanced both information and feedback.

### Gävle school campaign

In Gävle, a school-based campaign was linked with recent debates about pupils’ worsening health and the increasing amount of traffic outside the school. These issues had been under discussion within the school community, in the press, and amongst policy makers.

### Schools campaign Mol & Geel

The underlying campaign **teaser** for this school campaign was: “Learning together in mobility”. It was used only with head teachers to get their commitment to the school campaign.

Originally the plan was to involve two schools in Geel and two in Mol but during the consultation phase, 13 (out of 16) schools in Geel and 12 (out of 25) schools in Mol signed the declaration stating that they were prepared to take part in some parts of the campaign. This exceeded expectations.

A children’s questionnaire, designed to suit their language skills, was devised in co-operation with a headmaster and tested in one class.

One external factor may have had some influence on the campaign. During the campaign’s lifetime, traffic safety became a priority policy issue in Belgium: the issue was subject to widespread media coverage and to a commercial television campaign, called ‘Lifeline’, which was also partly addressed to schools.

### 3.4 Partnerships

Campaign management often requires managing complex relationships with other organisations in the public and private sector. As top-level support from partners is often crucial to achieving objectives, this section deals with the ‘how’ to manage them. Throughout the campaign process and whenever adjustments in objectives or budgets and resources are needed, campaign managers need to secure their partners’ strategic and operational support.

#### **Step 1: Define which strategic and/ or operational partners may add value to the campaign and involve them in your campaign board**

Involving other organisations in the campaign – at both strategic and operational level – can add significant value to the campaign:

- Interest and commitment of other organisations may increase the scope and impact of the campaign
- Partners may bring additional resources
- The potential to offer services will also increase, by linking to partners’ resources
- It will be harder for the partners to ‘back off’.

The partnerships may comprise of:

- **Strategic partners:** the campaign initiator (authorities or public agencies, public transport organisations, non-governmental organisations, private sector companies etc.) may establish a **campaign board** with other partners, which acts as a strategic body to supervise the campaign process and to validate its outcomes. Strategic partners are allies with shared objectives – such as key players in the political, administrative, and non-governmental and/or private sector – identified and selected to take part in the campaign board under the chairmanship of the campaign initiator.
- **Operational partners** are invited to participate in the specific operational activities of the campaign. They share the campaign objectives but only take part in the campaign inputs (services, material, resources) and/ or in the implementation of the campaign.

In some cases, strategic partners may also act as operational partners. For example, municipal campaigns designed to obtain an increase in home-to-school journeys by public transport, cycling, walking or carpooling should establish partnerships with the educational community, preferably within the context of a local mobility plan. The feasibility of the targets set will depend heavily on solid co-operation between the campaigner(s), the educational community and the partners involved in the local mobility planning activities.

#### **Step 2: Establish a strong relationship with the campaign board**

A strong relationship with the board is best developed through the use of clear and frequent information and progress reports. If possible, involve the members of the board in different actions. Try to create win-win situations with them, gaining their support for any critical policy decisions – especially in situations when changes are needed to planning or funding.

As a rule: “If you can’t convince the people inside your own organisation, don’t try to communicate it to those outside”. Try to gain maximum support and interest from the people within your own organisation by presenting the campaign plans to them and asking them for their feedback and co-operation.

**Step 3: Specify the campaign budget**

The campaign budget should be defined by the campaign board, in keeping with the campaign type and the various activities to be carried out as early as possible in the campaign planning process. The role of strategic and operational partners here is very important. Often their involvement in the campaign is partly financial. Defining the budget is therefore combined with negotiating their commitment to the campaign and its objectives.

**Step 4: Secure additional funding, human resources and skills whenever the initial programme changes**

An often-overlooked task of the campaign manager is to ensure that the funding and manpower resources are appropriate. The better the campaign work programme is defined the better the budget can be specified, minimising risk. Whenever work programme adjustments are made, they affect the campaign budget. Make sure that you inform and involve the campaign initiator and the campaign board in any programme adjustments and their financial impact. A similar approach should be taken with human resources.

Before and during the campaign it is important that the work is divided between the different partners to maintain cost efficiency. As an example, one organisation could be responsible for an advertising campaign, but before that campaign starts, another partner could already have initiated a debate in the media from a different angle. Building synergies can help to manage the costs.

**Step 5: Allocate tasks to your partners**

Strategic partners can play an active role in supervising tasks such as feedback on objectives, design, process matters and validation of outcomes. Whenever common objectives are achieved, strategic partners may also act as sponsors.

The campaign manager allocates the operational tasks as specified in the work programme (such as producing or delivering campaign materials, advertisements, events etc) to operational partners.

**TAPESTRY EXAMPLES****Nantes bus promotion**

Semitan is in charge of managing all 'commercial' campaigns linked to the promotion of the bus and tramway network. Semitan's local authority, Communauté Urbaine, agrees the overall principles and when necessary, a discussion about achieving a balance between institutional and commercial communication take place. However, the details of the campaign and the campaign monitoring are the responsibility of Semitan.

In the case of TAPESTRY, Communauté Urbaine was involved more than usual in the validation of messages and survey methods.

In terms of the operational development of the campaign and its assessment, Semitan subcontracted out the following work:

- The design of the campaign to an advertising agency, selected for a period of three to four years for the strategic communication plan.
- The assessment phase to a market research agency, to evaluate whether the campaign met TAPESTRY requirements.

In parallel, an internal working group monitored the campaign, led by the marketing and communication department and involving the depot manager, line managers and drivers.

### **School campaigns in Austria**

The campaigns were organised as followed:

- **Co-financed budget:** “The TAPESTRY project was locally co-financed by the Austrian Federal Ministry for Education, Science and Culture (35% contribution) and various local co-financiers (city departments, the Provincial Government, Kinderbüro (Children’s Office) in Graz.)
- **Culture of partnerships:** “Vienna was chosen for the seminar because its traffic education is very conservative compared with cities like Graz and Linz, and the co-financer AUVA intended to research the transferability of the bicycle training system.”
- **Building strategic partnerships:** “The person responsible for traffic education in the state of Styria became a partner and also was one of the tutors (besides two members of staff from FGM). This proved to be a good strategy because it would have been much more difficult to gather an audience if an unknown and small campaign organisation had been inviting participants to this event. So multipliers from every Austrian region attended the workshop.”
- **Building operational partnerships:** “With the help of the traffic educator we managed to get in touch with all the other traffic educators and asked them to come to the seminar with 2 or 3 teachers from their respective regions. We then invited the police and all the other Austrian organisations involved in traffic education: the Austrian Red Cross, which prepares traffic teaching material for Austrian schools; the head of the traffic education department at the Ministry of Education; people working in the insurance company which was the financial partner in Vienna; cyclist and car lobby groups; and members of the Municipality of Vienna.”

### **School campaign in Mol & Geel**

The campaign design relied heavily on written commitments between the municipality and the schools (the ‘covenant’ as a binding instrument), which set out quantifiable targets and voluntary work from the school head teachers. This meant the setting was favourable for a solid partnership in which the school head teachers could become active and responsible partners in the campaign.

The campaign managers and team in Mol and Geel built a formalised partnership with the local school community (25 participating schools). The expertise of the head teachers was complementary to the campaign team.

Some strategic partners were included as 'third party stakeholders', mainly to deliver financial support:

- Geel: private companies, investing in this campaign to improve their image
- Mol: St. Christof foundation, which is the local organisation that manages the local traffic education centre.
- Flemish Government as co-financier for the TAPESTRY project and involved in later dissemination activities.

The school campaigns had top-level support and had been financed by the municipalities of Geel and Mol with co-funding from the European Commission and the Flemish Government (additional funding is available for schools who work on a green travel plan under the covenant policy programme). Both municipalities were also funded by the Flemish commercial television 'Levenslijn' (Lifeline) campaign.

### **3.5 Operational campaign programme**

As a next step, the campaign manager and campaign team should establish an effective operational campaign programme, focusing on an action plan and project timetable. The nature of the implementation process in campaign organisations may vary greatly, from producing relatively simple posters, leaflets, newsletters, info packages and local events to more complex marketing and interactive communication packages and activities with various partners. In all cases, the campaign organisation should develop a set of actions and a timetable to deliver the expected outputs and outcomes.

#### **Step 1: Draw up the campaign action plan**

The campaign manager draws up the operational action plan for the campaign team. It covers all actions to take concerning the agreed objectives and the selected design. This action plan describes the various activities in detail, sets the timetable, and allocates responsibilities and budgets.

#### **Step 2: Define the various actions and set the timetable**

Define what actions should be taken and in which order they should be done to maximise potential dynamic effects and synergies. Check the timetable, ask yourself – is it realistic?

#### **Step 3: Allocate responsibilities and budgets**

All people in the team should have a personal responsibility for ‘their’ part in the campaign. That is one of the most important factors for success. A project without personal responsibilities will fail!

The same must be said for the budget allocation. Allocate the budget on the same level as responsibilities for activities are delegated. However, make sure there is also some sort of financial control system in place that allows for overall control.

#### **Step 4: Assess progress**

Assess your progress at regular intervals.

- Are you keeping up with the targets set in your action plan?
- Are you keeping up with the timetable?
- Is the budget being spent as allocated?

#### **Step 5: Turn the action plan into a campaign handbook for future campaigns**

During the whole campaign/ process, document how the work is progressing. At the end of the campaign, it is a good idea to commission an independent person who can help the management team to evaluate the whole process. In-depth interviews with key persons could add important and useful information for the future. Openness between the team members is very important at this stage.

## TAPESTRY EXAMPLES

### Schools campaign in Mol & Geel

The school campaign management team in Mol and Geel drew up an **operational school campaign programme**, which can be characterised as an **integrated package** of four main actions:

- Information activities (participation and consultation)
- Awareness raising activities
- Education
- Traffic (organisation) projects
- Infrastructure measures (mainly outside the scope of TAPESTRY)<sup>8</sup>

The programme was **split up into various timetabled actions** such as:

- A popularised version of the mobility plan designed as a PowerPoint presentation and made available for open forums
- A commitment declaration to be signed by the participating schools
- Free package of educational materials to work with in the schools
- A demonstration day to ‘teach the teacher’ to work with new educational goals in a more structural way
- Revising and distributing a new leaflet to encourage cycling using safe networks
- Production of green school travel plans
- Elaboration of a traffic educating route
- A TAPESTRY ‘project week’ as a final integrated activity programme to round off the campaign, with a car-free school day, traffic event with free gifts, stage performances, the inauguration of a new traffic education centre, education and awareness raising activities on a school level. This TAPESTRY week was announced through a wide range of media (leaflets, posters, municipal magazine, mailings, website, press conference, regional television, newspaper articles...)

Several of the above actions were designed to fit a **step-by-step campaign** in which typically **fun** projects were complementary to the more ‘**serious**’ activities.

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<sup>8</sup> Under the policy guidelines of the Flemish Mobility Covenant Programme, schools that are located within 200 metres of a regional road have to ensure that the road environment and multi-modal travel patterns meet given traffic safety criteria. The schools are encouraged to produce school travel plans and to identify their traffic safety needs.

<b>KOMIMO</b>		
The work programme and timetable are summarised below:		
<b>What</b>	<b>When</b>	
	<b>WSRU 2002</b>	<b>PTW 2002</b>
<b>Case study design</b>		
Discussions on theme	June – July 2001	December 2001
Decision on theme	31 July 2001	05 Sept. 2001
Development of several project proposals	October 2001	February 2002
Discussions on which project proposals should receive Komimo funding	November 2001	March 2002
Decision on which project proposals receive funding from Komimo	05 Dec. 2001	06 March 2002
General appeal to local authorities, organisations, schools etc to participate in the WSRU/PTW	December 2001	March 2002
Preparation of the selected projects	January – April 2002	April – September 2002
Follow-up of the implementation process during working meetings and meetings with external partners	January – April 2002	April – September 2002
<b>Case study implementation</b>		
Press conference	02 May 2002	11 Sept. 2002
Media campaign	May 2002	September 2002
WSRU/PTW	08-19 May 2002	22-29 Sept. 2002
<b>Case study evaluation</b>		
Campaign management	August 2002 – January 2003	
Met Belgerinkel naar de Winkel (specific campaign assessment in Mechelen)	Before: 10 - 13 April 2002 After: 6 – 9 November 2002	

### 3.6 Working with communications agencies

This section has so far mostly discussed the work within the campaigning organisation or that carried out in co-operation with strategic/operational partners. Section 3.6 will focus on, and give ideas about, how to work with advertising agencies and/or PR agencies and the importance of building good relations with the media.

Why is it important to consider communications agencies? In many organisations, especially those in the public sector, there is a lack of understanding about these types of agencies and the sort of work that they do. An overview of why and when it is appropriate to use an advertising or PR agency is therefore set out below.

Campaigns usually either target consumers or decision-makers. Consumers can be defined as the 'end user': that is, those whose behaviour, attitudes and awareness the campaign aims to change directly in order to achieve objectives such as increasing public transport revenue or higher levels of walking or cycling. Campaigns targeted at decision-makers aim to achieve changes that may then have an indirect impact on consumers. These include changes to legislation, traffic systems, support for sustainable modes through subsidies or grants etc.

If the campaign is targeting consumers the campaign team should work with an advertising agency. If the campaign is targeting decision-makers and/or politicians the campaign team should work with a PR agency instead of an advertising agency.

A PR agency is best described as a bureau that works with communications aimed at influencing a wide range of audiences, both inside and outside an organisation, and for which publicity in the mass media is an important element. PR stands for Public Relations. Other terms used for this kind of company are communications or information consultants.

The user of a PR agency could be a political party, a public or non-profit organisation, or a commercial enterprise. The work carried out by the PR agency is often advisory, and the agency may not take an active part in communications. However, PR agencies may also carry out communication initiatives on behalf of the client, such as press work, event/ meeting organisation (with key individuals or groups), or consultations processes. The channels chosen can include anything from meetings to articles in the mass media. The target group is often more specific than the consumer market.

When producing campaign material, it is of great importance to connect the campaign objectives and the message with the profile of the audience that is being targeted. Often additional (market) research or initiatives, which enable feedback and interaction with the target groups, is needed (see Section 4.1). Important questions to ask within the campaign team are:

- What medium is the best to achieve the best range and 'interest' in the target group?
- How do we design our campaign material to fit the medium?
- Do we need external help from an agency?
- If so, is it an advertising agency or a PR agency we need?

Always keep in mind the budget and available resources when considering the above questions. And finally, the campaign team must also establish good relations with the press and media.

**Step 1: Define the tasks that you want to commission an advertising agency / or a PR agency to carry out**

Before you approach any type of agency, whether advertising or PR, be very clear about your own objectives and strategies. What kind of help do different projects and campaigns most often need?

The three most common tasks that agencies can help with are:

- i) Strategies – developing communicative strategies e.g. the target groups gain advantages if they ‘buy’ your product/ services.
- ii) Developing the campaign – the campaign team has some idea of the strategy but needs help in developing the campaign, in particular with aspects such as how to create interest and visualise the messages.
- iii) Designing the campaign. To a certain extent this is similar to above bullet point, but the difference is that the campaign team already has a very clear picture of ‘how to do it’ but needs help to visualise it and to discuss the choice of media channels.

When choosing the right agency it is also important to have an internal discussion. What are our team’s strengths and weaknesses? Are our campaign team members more analytical than creative or vice versa? The agency’s strengths should make up for the campaign team’s weaknesses.

**Step 2: Contact agencies**

When choosing an agency, don’t forget to ask for references. Ask the agency to demonstrate how they have achieved results with other similar campaigns, and how they worked to solve the client’s particular communications problem. Do it with the same degree of care as you would when you take on staff. The agency you choose should demonstrate an understanding of the ethos of your organisation and the objectives of your campaign.

When you begin working with the agency, be very clear (once again) about the campaign objectives and the tasks you want the agency to help you with. At this point, it is usual to talk about the creative brief. The creative brief consists of the most important information the campaign team gives the agency about the campaign. A good brief means that the agency has fully understood why the campaign is important, to whom it is addressed, and what the target group is meant to change.

The starting point for the agency often depends on how far the campaign team has got with its own planning. If the agency has to create the campaign (see above definition, Steps 1 i-iii) the campaign will be more expensive.

When meeting the agency, be as cost efficient as possible. The meetings should focus on:

- How to create a good message (an emotional or a rational message)?
- What kind of medium should be used?
- Which are the best channels to distribute the message and the chosen medium?

After every meeting with the agency ask them to prepare a short written summary about what you have agreed during the meeting and what their tasks will be. Work with a realistic time schedule.

### **Step 3: Assess the work done by agencies**

Almost the only way to build up knowledge about whether agencies are successful or not is to assess the campaigns that they have been running. This is useful for both the campaigning organisations and the advertising agency.

What should be assessed?

- How many in the target group saw/ heard about the campaign?
- Did they understand the aim of the campaign?
- Do they find the campaign message relevant?
- Did they like it (positive or negative reaction)?
- Are they going act on the campaign message? (Have they changed their attitude? Do they think that they will make any changes in their behaviour? etc.)

For more details about questions that can be used to measure campaign recall, see Section 6.

### **Step 4: Define the relationship you want to establish with the media**

A relationship with the media must be built on reliability. A good approach is to define what you want the media to think of you as an organisation, e.g. reliable, open, and maybe “important” (in terms of levels of expertise and being abreast of issues in this area).

### **Step 5: Set out a work plan for press relations**

The next step is to approach the media and fulfil your plans. The easiest way is to start with a really important issue that creates interest, and the campaign will come under the spotlight immediately. In this phase, the campaign team must be fully prepared to deal with both positive and negative press coverage.

When you approach the media:

- Think in terms of pictures or photos, not words
- Focus on what you are going to do (or have done) with your target group (and not your own organisation)
- Be honest – tell the media about your less successful projects (if they ask) as well.
- Try to give your project an identity (‘a face’).
- If possible, describe the potential for change in the campaign.

### **Step 6: Inform press and media at the most appropriate times**

This last bullet point is all about being receptive. When things happen or are being discussed by the media that could be connected to your campaign, take the chance to promote your ideas.

### TAPESTRY EXAMPLES

#### **School Campaign in Gävle**

One evening the campaign manager heard an ad for a programme the next day on one of the national stations broadcast by Sweden Radio about worsening health rates and the correlation with the increase in car use. In the morning, he wrote an email to the programme producers about the cycling project in Gävle. That same evening he participated in the programme for 15 minutes, giving good examples from Gävle. There was a lot of positive feedback after that programme.

#### **School campaign in Austria**

The campaign in Linz was publicised in a variety of ways, including a press conference, local radio broadcasts ('Life Radio', ORF2), materials published at [www.linz.at](http://www.linz.at) (Mediaservice of Linz) and various newspaper articles.

### 3.7 Learning Lessons

The easiest way to ensure that the campaign continues in the long term is to prove that the project is successful. However, any campaign is a learning process both during its lifetime and at the end, when it is possible to learn lessons for future initiatives.

#### **Step 1: Keep an open mind about improvements in the work programme during the campaign**

In the planning phase, it is impossible to foresee all the different situations that are going to occur during the campaign. The best way to handle this is to make sure you always have a budget and other resources available for unplanned activities, giving the organisation flexibility to change when necessary.

#### **Step 2: Listen to your target audience**

The best way to avoid mistakes (e.g. send out the wrong message) is to carry out a pre-test of the advertising material and/ or main message you have decided upon. Depending on what kind of campaign you are running there will be different methods to use. (See Section 4.)

Once the campaign has started, it is important to listen to any initial reactions (or lack of reactions) from the target group. Depending on what you hear you should decide whether to continue according to plan or carry out adjustments.

#### **Step 3: Make adjustments whenever needed and possible**

When discussing adjustments to the campaign, be sure that the proposed changes are really necessary. Often when a campaign starts there are a lot of anecdotal stories that crop up and create uncertainty.

#### **Step 4: Carry out an assessment at the end of the campaign**

Once the campaign has finished, consider asking an independent expert or panel of experts to review the management of your campaign. Or, if more appropriate, use the Campaign Design Tool (see Annex 1) as the basis for self-assessment. More details on both these approaches can be found in the TAPESTRY Campaign Assessment Guidance.

## TAPESTRY EXAMPLES

### **KOMIMO**

The Week of the Soft Road User 2002 and Public Transport Week 2002 were assessed on three different levels:

- 1) Assessment of the overall campaign management
- 2) Assessment of one project, 'Met Belgerinkel naar de Winkel', using the TAPESTRY Common Assessment Framework

The assessment of the campaign management was guided by an external organisation specialising in auditing and consultancy for non-profit organisations. The assessment was based on the Delphi method and involved several stages:

1. The first stage was an introductory phase, in which the consultant was informed of the general background of Komimo, the goal of the campaigns, the way the campaigns were managed, and the expectations for the assessment process.
2. In the second stage, the consultant held individual sessions with the different member organisations of Komimo in order to obtain a clear picture of the strengths and weaknesses of the campaign management. From these different individual sessions a number of items were selected for discussion in the common sessions.
3. In the third stage, a number of panel discussions were held in order to determine and discuss the campaign management and to develop a common view on how to improve it.

## 4 DESIGNING YOUR CAMPAIGN

This section sets out the most important factors to consider when designing your campaign. It begins by introducing the concept of the ‘Customer Value Proposition’, before outlining some common pre-campaign research methods to help you define the messages and images you use. Advice on how to convert the results of your research into a campaign concept is then followed by guidelines on defining the message, the message giver, and the tone of your campaign. Finally, factors relating to media choice, roll-out, timing and delivery are considered. Each of these factors is included in the checklist (Campaign Design Tool), found in Annex 1.

### 4.1 Pre-design research

Before you design your campaign, it is valuable to gather as much information as possible about your target group. This research may be qualitative or quantitative. Quantitative research involves collecting data which ‘quantifies’ or counts that which is being investigated. For example: “75% of people agree that congestion is a problem.” This sort of research would usually involve some form of structured questionnaire or perhaps traffic level counts etc. Qualitative research looks at what ‘qualifies’ or describes. The techniques set out in this section refer to qualitative research, to gather information on elements such as perceptions, attitudes, and reactions to particular messages and images.

#### 4.1.1 *Customer Value Proposition (CVP)*

It is vital to have knowledge of the language, thinking processes, needs and perceptions of the target audience prior to starting the design process. Often the identity and nature of the audience most susceptible to change (the ‘early adopters’) may not be known. So the research process has to start with a statement of your ‘Customer Value Proposition’ (CVP).

A Customer Value Proposition is a simple statement of how the messages of your campaign will relate to the values of your target audience. Writing the CVP can be challenging, as it requires a shift from thinking about the campaign in strategic, policy or ‘mobility management’ terms, and instead writing it in plain language.

For example, an objective to reduce car traffic along a particular corridor by 5% has to be translated into something meaningful for the public. For the (potential) passenger it might mean ‘new and more frequent buses’ or maybe ‘less hassle than driving’.

Commercial companies spend a long time defining the CVP. Quite often a number of value propositions are created for later testing with different audiences. Once the appropriate proposition(s) has been developed, it should be used to guide all aspects of research and campaign design.

#### 4.1.2 *Location and context*

Research among the target audience needs to be carried out in the most appropriate location. If you want to know how consumers describe their shopping experiences, take them to a supermarket and get them to walk around pushing a trolley as they talk. Likewise if you want

to know exactly how people view travel experiences by bus, then go with them, wait at a stop, get on the bus, and sit with them. A realistic context will enrich the data.

### 4.1.3 *Decide research methodology*

There are two main methodologies commonly used for qualitative market research: focus groups and one-to-one interviews.

- **Focus groups**

Focus groups are commonly used to generate qualitative data. These allow in-depth exploration of people's opinions and attitudes to key issues, such as responses to the proposed CVP. They can also be creative events, allowing members of the group to express opinions and come up with a range of new options. A properly conducted focus group is a value-free non-judgemental exploration of ideas and options. It gives rise to an understanding of the language and ways in which people will view your CVP. Focus groups will not give definitive answers to questions. Instead, focus groups should be used to create ideas for campaign materials (see mood boards and concept testing below), and to help develop questionnaire items for future quantitative research.

Running focus groups properly is a skill. There are many books on qualitative research giving suggestions for methods of organising and facilitating. Cultural differences and customs between countries mean that there is no one correct method – you must be guided by local experts on recruiting methods, levels of incentive, venues and refreshment policies. Likewise, confidentiality rules and customs differ widely.

There is a variety of techniques for generating these ideas, images and qualitative data.

- **Discussion**

Quite simply, the process involves suggesting a topic and asking people to discuss what it would look like, how to implement it, and the possible advantages and disadvantages. Sometimes the discussion can take the form of a debate, with some supporters and some detractors. On many occasions it can be useful to split the group into sub-groups – then invite the sub-groups to present their ideas and discuss them collectively.

Regardless of the method used, the facilitator's job is to stimulate discussion, to listen and observe carefully, to accept all ideas as 'true' and realistic, and to involve all members of the group.

- **Story-telling**

Stories and even dreams are ways of accessing new ideas that may not yet be realistic – especially in the eyes of the public. Keeping the mood up-beat releases people's creativity. It helps to use the third person when you want to access negative ideas. So instead of asking, "Tell me about some examples of bad driving that you have done", you would ask, "Tell me about bad driving that you have seen others do".

- **Exercises (drawing etc)**

Drawing exercises appeal to some groups – especially young children. A task might be to draw a layout for cycle access to the school, which is then used to stimulate discussion.

It is important to listen carefully to the justifications and reasons for decisions and recommendations. These are the language for your campaign.

- **Problem-solving**  
With this approach the members of the group are asked to join in a design process, for example, “How could we influence parents in this area to allow their children to walk to school?” Note that in most cases, you should not ask, “What would influence you?”. Most people feel uncomfortable talking about themselves. But they are more likely to have ideas about other people.
- **Critical incidents**  
This technique invites people to tell a real story about an event that had a big impact. For example, when attempting to find out what sort of messages would influence people to take notice of signs concerning congestion and route diversions (an exceedingly uninteresting topic) the group would be asked to recount incidents of severe congestion leading to personal inconvenience. At each stage of their journey they would be asked, “What information could you have used? How might it have helped? Where when and how should it have been delivered? What style?” This can help to stimulate discussion.
- **Competitions**  
One way to enliven a focus group is to divide it into two or more sub-groups and use the creative exercises described above to mount a competition between groups. The lively discussion about who won will bring out yet more qualitative data surrounding the ideas being investigated.
- **Personal 1:1 in-depth interviews**  
Personal interviews are useful for discovering core needs and motivation. By talking to people on a one-to-one basis the effect of ‘group dynamics’ is removed and you are more likely to find people’s real opinions and core values. However interviews must be carried out with great care in order to avoid offence or make the respondent uneasy. A threatened or ill-at-ease respondent will not tell you anything. Personal interviews are reserved for the more serious aspects or topics of campaign design, for issues such as health, personal relationships, personal development, or money. They could also be useful in schools campaigns, where it may be necessary to get to know core motivational factors for parents in order to build an effective campaign.
- **Observation**  
This can be useful when researching user requirements for information systems and displays (e.g. maps, timetables and web sites). Different options are presented to the users and the way they navigate around is observed and documented. In follow-up interviews you can ask why the task was approached in a particular way, what did they see, hear, think or anticipate, and how the process could have been improved.

#### 4.1.4 Structure the research

##### Research management

It is crucial to be as systematic as possible when organising the research. While it may be quick and easy to assemble a group of people and ask them some questions, this is unlikely to result in quality data. There are a number of critical steps:

- Define the research sample.  
The research sample should closely reflect the target audience(s) for the campaign. It may be necessary to segment the audience carefully to allow for more effective research. For example if the campaign target audience is young people aged 5-15, it will be necessary to interview 5-year-olds with their parents, while with 15-year-olds it might be better to interview them with their close friends ('friendship pairs').
- Decide group composition(s)  
Groups usually work best when they are comprised of people from similar backgrounds – so that they share similar values and can compare and communicate their thoughts more easily. Groups are often segmented according to age or gender, or sometimes by response to a particular issue. For example you may find a great deal of valuable data from people who agree with a statement such as, "I hope I never have to travel by bus". This may unite the group more than similar age or background.

Social class can be an important issue in some countries. Try to bring people together from similar social backgrounds, to aid discussion.

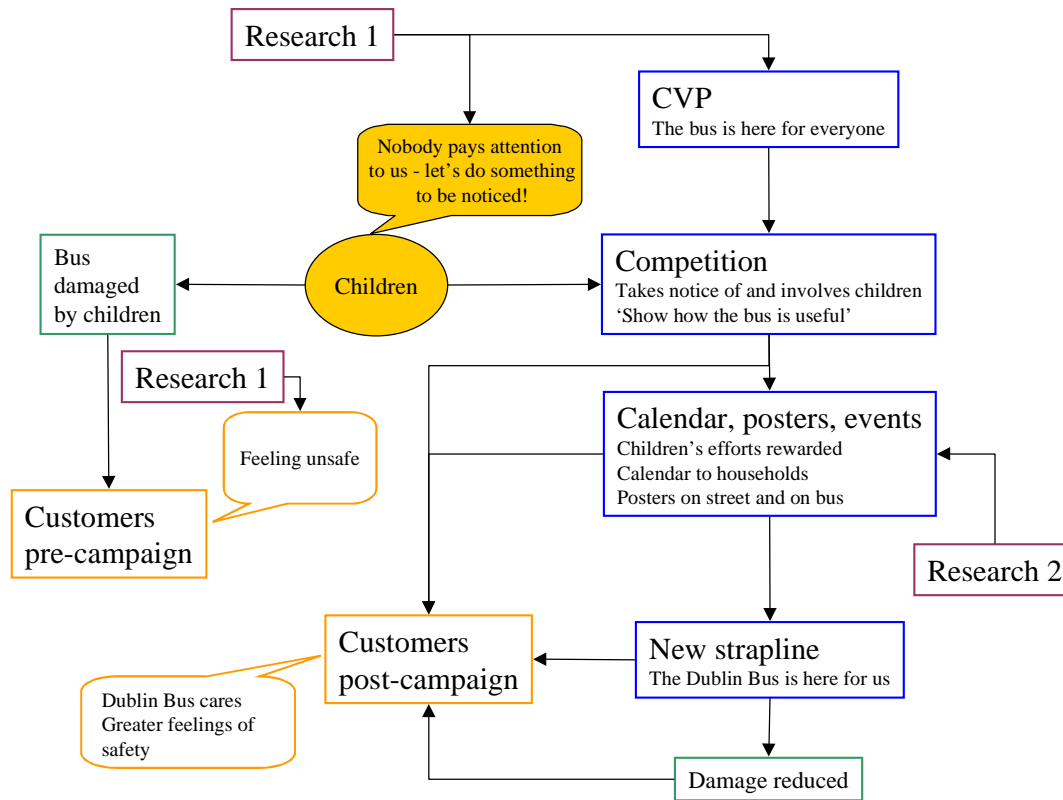
- Decide on Customer Value Proposition(s) and other stimulus materials  
CVP statements (written out) maps, images, sounds and video can all help stimulate discussion. Sometimes specimen web pages are used – but remember these should actually be on a computer and connected online otherwise the simulation is not valid. It is important to be clear about the purpose of using stimulus material: is it to prompt discussion, or are you actually testing the materials and hoping that the group will make a 'choice'? The way the groups are run should be different in each case.
- Sort out the research systems.  
There should always be a focus group proforma or discussion guide to help the facilitator ask the right questions and ensure a degree of consistency across the research. Facilities are important: think about the comfort of the research room, viewing, and video/sound recording as required. Refreshments, incentive payments and transport/babysitting arrangements can all make the respondents feel more comfortable and help the research process.

#### 4.1.5 Analyse data

There are a number of ways to analyse qualitative data, including the use of computer software that analyses themes in transcripts from interviews. The most basic method however is to review the transcripts manually and to look for significant themes from the research - issues which come up across the groups and have some common elements. This will help to identify key messages that will engage the various audiences.

It may be helpful to use the core themes from the research to construct a conceptual diagram showing how the campaign links to the evidence on the ground and personal motivators. An example of the process using the Dublin Bus campaign is shown in Figure 4.1 below.

**Figure 4.1: Dublin Bus Campaign – Example of Conceptual Diagram**



The points of research intervention are shown in the figure.

#### 4.2 Preliminary design / concept testing

The above process shows how research can help the development of campaign concepts. A later stage is to use qualitative research to actually test responses to proposed campaign ideas, materials or draft advertisements. This is a crucial stage, particularly if you are about to conduct a campaign in a new area. For example, in Dublin in 1992 the launch of the CitySwift brand of buses was originally to be advertised as ‘Small single deck’. The supposition was that people would like the modern, small, more intimate image. Instead they took this message to mean, “The bus will always be full and I will not be able to get on”. New research showed that the brand attributes of speed and frequency were most important.

Materials to be tested can be simple concept sketches, using cartoons and ideas drawn out on display boards (often called ‘mood boards’). However, the more final the proposition, the more confidence you will have in launching the final (tested) campaign. This can be very useful when defending the campaign to the media or other critics.

The order of materials should be rotated, as order of presentation may influence the audience reaction and perception. People often read only the first line: if they do not like it they will ‘blank out’ the rest of the message.

### 4.3 Message & message givers

The message of the campaign will be based on the research described above. The most important aspect of the message is that it must contribute to and create value for the customer/target group. It has to make the target group more motivated to try or buy your product/services.

#### 4.3.1 Who are the icons for the target audience?

Audience reaction to the campaign will vary a great deal depending on their perception of the credibility of the communicating agency. For example, a bus campaign from an environmental group may have a ‘green’ image, while a bus company logo on materials may give the impression that they are simply trying to sell more tickets. These issues can have an influence on the audience uptake of the campaign messages.

One approach is to involve personalities (or other organisations) that immediately give the campaigning organisation more credibility. Reliable persons/ organisations may also create a higher interest among media and leading decision-makers.

For example, in the TAPESTRY school campaign in Gävle, two players from the leading national ice hockey team were involved in the campaign, which directly created interest from the media. The hockey players talked about the importance of daily exercise and the advantages of cycling and walking to school. And they did it from a ‘high platform’ of credibility. The psychology behind this is that the credibility of the icon automatically gives validity and credibility to the message.

**Figure 4.2: Example of icons – Ice hockey players in Gävle**



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Svenska Dagbladet

### 4.3.2 Create ‘personalities’ that are aligned with the audience

Campaigns aimed at large target audiences should be careful to segment the audience into different specific target groups. Each of these groups may have different core values and therefore need a different core value proposition. For example the overall message of a cycling campaign might be, “Improve your health through cycling”, with more specific sub-messages for each sub-group:

- Cluster X – Bikes are fast. Aimed at young people – mainly males, using modern city-bikes.
- Cluster Y – Bikes give freedom and flexibility. For middle-aged and older people, who might want to cycle to the city centre and not have problems finding a parking space.
- Cluster Z – Bikes give time to relax and time to think. Aimed at busy mums or workers living hectic lives.

Each of these sub-campaigns can have quite different brand personalities, while still reflecting core values. And they help give the campaigning organisation a greater internal understanding of the different segments that they are going to approach.

Quite often the range of possible target audiences is too wide to address in a single campaign, either because of their diversity, or because of budget restrictions. In this case the campaign manager is advised to target those market segments that are most likely to respond to the campaign. This has the effect of producing the greatest effect for the budget spend and, very importantly, shifting social norms in the direction of the desired change. If social norms change, that will have an effect on those more resistant segments that have not been directly targeted by the campaign.

## 4.4 Tone/ creative design

A crucial step is to decide the tone of the message, particularly whether the campaign should focus more on rationality or emotions.

The tone of a campaign must match the target audience. The Dublin Walking to School case study gives an example of what is meant by this. The campaign spoke with an authoritative tone about health. The message was set in 10 pt Times Roman font within an A4 triple fold brochure, mainly designed to sell life insurance products. This responsible logical tone was quite inappropriate for children aged nine! Therefore, there was no positive reaction to the campaign.

There can be a dilemma if the tone to be adopted is incompatible with the image of the campaign organisation. Some tones are more or less appropriate or suitable for the organisation. Every organisation has its own reputation based on its identity and its external image. If it is to be trusted, the choice of tone has to be in line with these values. This does not mean that you are ‘stuck’ with the same old tone. Changing the tone can be an important step towards changing the image. It could act as a bandwagon upon which the organisation can jump. But to get there the tone has to be trusted. A possible solution could be to create a separate branded part of the organisation in the same way that motor manufacturers retain

separate branded entities, e.g. The ‘Ford’ Land Rover, BMW’s Rolls Royce and Toyota’s Lexus.

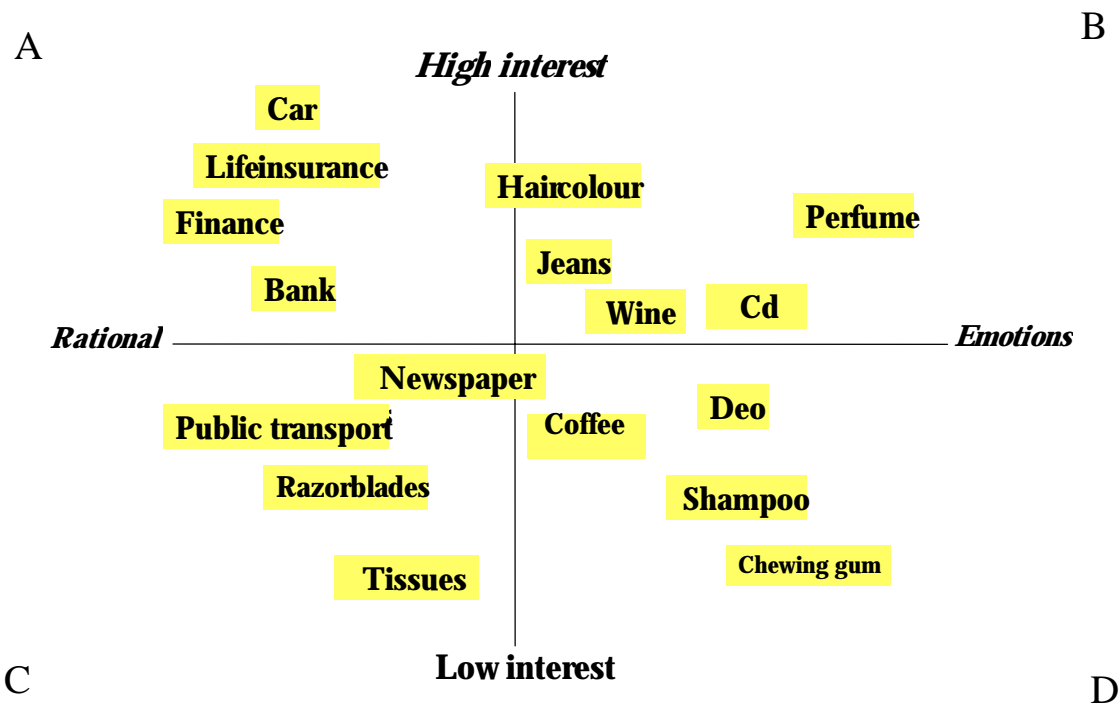
The **creative design** of the campaign is the step where you finally decide how the message will be designed, and which gives you the final idea of how to deliver it in the most effective way.

Will the message be built on emotions or will it be built on a rational platform? Most advertising agencies will immediately say that the message must be an emotional one. Emotions are important, especially if you are trying to convince people to change behaviour, from one mode to another.

A useful first step along the creative path is to carry out research to build a product value or positioning map. By doing this you can see where the opportunities exist, what the competing forces are, and who the most susceptible audiences are. Techniques for creating such maps are complex. They can be built using qualitative data, through creative workshops with members of target audiences, or through totally data-rational approaches by analysing data using Principal Components and Factor Analyses.

Below is an example of a ‘value map’. The map gives you an idea of how the market will perceive your campaign and message. Depending on where on the map you will be located, it will give you a clear idea of how to deliver the message.

**Figure 4.3: Value map - The markets knowledge and interest for products**



The map shows the market’s interest in different products, and whether people’s decision to buy a product or change their behaviour is made from a rational or an emotional base.

In the picture above we have – as an example – put public transport in the box on the left, representing low interest. This does not mean that the campaigning organisation cannot use humour or a message that creates positive emotions, but the message must be built on rationality. As an example, if the bus services has improved and the bus company has increased the frequency of bus service to depart every five minutes, then the message could be that it is ‘easy to use’, ‘reliable’ etc.

Another example, on the other side of the map in quadrant D, is chewing gum and shampoo. In this case the market will show the same low interest (as for public transport) but in this case the message must be built on emotions – for example, “you will feel fresh”, “you will feel nice and beautiful” etc.

The same arguments are used in relation to quadrants A and B. Above to the left (A) the message will be a rational one, e.g. the car is safe etc. Or, we will give you a higher income on your capital (finance, banking) etc.

Finally, products in quadrant B, such as perfume and wine, should be promoted with an emotional message. The difference between marketing shampoo (in quadrant D) and perfume (quadrant B) is that the people in this market are much more interested in the product, thus affecting the marketing strategy the company chooses.

Put another way: there is nothing intrinsically exciting about using soap or shampoo, they are means of getting clean. Perfume intrinsically has no utilitarian function: it is purely a ‘personality’ product. The challenge for the advertiser is to raise interest in shampoo by means of sexy images etc. Perfume already has the interest of the audience, so the challenge is to communicate and position it.

In Dublin the most successful Quality Bus route has been repositioned from a low interest rational commodity to a product with higher personal interest and additional personal advantages (lower stress, arriving on time, short journey, inexpensive).

Remember also that such product placement maps will be different for different cultures and market segments.

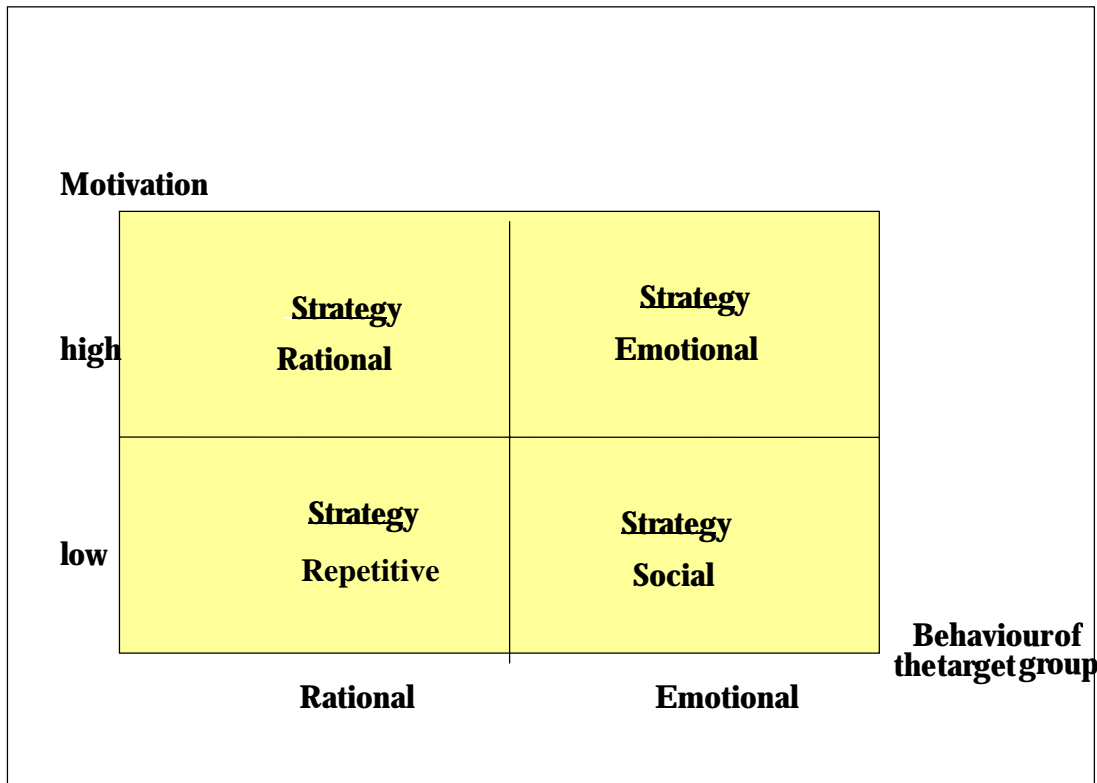
#### **4.5 Media / Timing / roll out / delivery**

Some key issues to address about roll-out are:

- How should the media strategy be designed?
- How often should we advertise?
- Should our campaign be executed only once or should it be repeated at intervals?

Figure 4.4 gives you an idea of how to design your media strategy. This map builds on the value map shown in Figure 4.3.

**Figure 4.4: Choosing your creative media strategy**



If your product is considered low interest and built on a rational basis (box C) – e.g. public transport in Figure 4.3 – the campaign must be designed to be repetitive. Why? The market’s (i.e. the target group’s) low interest in your offer means that a lot of people may not take any notice of your adverts.

For example, a public transport company with a limited advertising budget must consider how to find the best medium for a repetitive campaign. It has to choose between placing a few big advertisements or instead placing a series of small advertisements over a longer period. In general, it will be much better to choose the series of small ads because they give longer overall exposure and more people will subliminally become aware of the offer.

If your product is placed in box A – high interest/rational message – it could be a better idea to ‘go big’, but less often, because the market will already be pre-disposed to notice the adverts.

In box D, the message must have a more ‘social’ tone. People who choose the product will do so in the context of relating to other people and taking part in a social event. From a psycho-segmental point of view these people will be quite homogenous in the way they think (within this context) e.g. young people having the same chewing-gum, drinking coke, sports teams in the bar after a match etc.

The conceptual models described in Figures 4.3 and 4.4 illustrate that products and companies in the lower boxes – with low interest from the market – often have problems identifying appropriate market segments. Products are often low price and utilitarian and treated to a mass-market communication with little regard for appropriate targeting.

If the product (and the company) creates higher interest from the market (box A-B) it is much easier to carry out a proper segmentation (in terms of attitudes, socio-demographic, private-business etc) and therefore much easier to choose more specific media that will relate to the target group.

When designing the media strategy, it could be helpful to consider the following questions:

- How will our message be delivered? (Media channels – TV, radio, newspaper, brochures etc.)
- How often?
- To the right target group? Do we reach the right target group?
- At the right time?
- How far do we reach?
- Quality of the contacts and the frequency?

Part of the market research process should also be to research the media usage and habits of the target audience. For a very good example of this, contact ‘Markeds og Mediainstituttet’(MMI)<sup>9</sup> in Oslo, who have created the Norsk Monitor model of the Norwegian market. This is a multi-layered tool that positions media, products, socio-economic segments and personality types within a single model. Use of this model cuts out much of the need for primary research, allowing researchers to address key issues of image, tone and strategy.

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<sup>9</sup> See <http://www.mmi.no> for more details

## 5 IMPLEMENTATION MONITORING

The implementation phase of a campaign includes all activities that take place during the campaign itself, after the planning and development stages. It is critical for the success of the campaign because, in most cases, activities are implemented only once. Any problems that arise need to be identified as early as possible in order to find a solution before the consequences become irreparable. Even the most thorough planning and design process cannot eliminate the possibility of problems arising during this phase.

In addition, the implementation phase is the key time to monitor factors such as inputs and outputs, needed to assess the efficiency of a campaign

This section therefore sets out how you can monitor inputs and outputs, as well providing guidance on problem identification and resolution. Collection of outcome data may also occur at this time but is covered in Section 6.

### 5.1 Monitoring resources allocation, inputs and outputs

#### 5.1.1 *Reviewing the effectiveness of resource allocation*

Before implementing the campaign, its managers should have fixed the total budget for the whole campaign and the allocation of resources to each task planned as part of it (see Section 3).

However, during the implementation phase it is possible that the initial resource allocation will no longer seem appropriate to the needs of the campaign. Firstly, the budget could have been estimated inaccurately and therefore it may need to be adjusted. Secondly, the scope of the campaign may prove to be insufficient and need to be extended to other communicative/distribution media or techniques. This could involve taking on additional internal or external staff. Finally, there may be changes in the environment in which the campaign is being run (related to external factors and non-campaign measures) which make it necessary to redefine the campaign content and implementation.

In all cases, effective tools are needed to allow problems to be identified as soon as possible and to reallocate the financial resources in a more effective way. This can be achieved through:

- Internal, periodical financial audits (as a cost-effectiveness analysis)  
As campaign manager, you could propose fixing times during the implementation phase when internal financial audits should be conducted. This financial audit should be based on a cost-effectiveness methodology, in order to compare the effectiveness of a measure (or action, activity, etc.) against financial resources allocated to it. The audit conclusions would then enable you to re-allocate the budget towards new more efficient activities or, in general terms, to re-organise the implementation phase. This approach is best suited to long-term campaigns or communications programmes.
- Periodical campaign management meetings to identify problems and consider recommendations about the possible reallocation of resources

A simpler solution is to plan periodical campaign management meetings during the implementation phase. Those participating should be able to decide on the effectiveness of the budget allocation and, if needed, reallocate the budget in a more efficient way.

### 5.1.2 Monitoring inputs

Monitoring inputs aids understanding of the full costs of the campaign: it is a key element of assessing whether campaigns are cost efficient. In addition, input indicators can be useful when planning future campaigns.

Table 5.1 sets out the input recording table developed as part of TAPESTRY and used by the TAPESTRY case studies. The table can be used to record costs for each type of output or campaign material that is produced as part of your campaign. Costs are separated into three concepts: design, production and distribution.

**Design costs** refer to the selection of the communication material and its development – for example the process of deciding to have a leaflet, the detailed graphic design and copy-writing process, and the preparation of a mock-up. They also include any costs relating to pre-testing the material, e.g. through a focus group. They are likely to include a higher proportion of personnel or manpower costs than direct costs.

**Production costs**, however, are likely to involve more direct costs. In our example, production costs would be the cost of printing as many leaflets as necessary to distribute to the targeted group.

Finally, **distribution costs** are all those allocated to ensuring the delivery of the communication material to the target group. In the case of a leaflet, these could be the costs of sending the document by post to your target group.

For each of the three categories, personnel costs should also be included, even though it is sometimes difficult to calculate them. Wherever possible estimates should be made if the precise costs are not known. This is also the case if the campaign uses volunteers: the estimated value of their work should be included, so that it is taken into consideration by future campaigns as part of the budget planning.

**Table 5.1: Input indicators (all costed in Euros)**

<b>Medium</b>	<b>✓ tick those which apply</b>	<b>Design costs</b>	<b>Production costs</b>	<b>Distribution costs</b>
n'paper – national				
newspaper – local				
magazine – national				
magazine – local				
radio – national				
radio – local				
television – national				
television – local				
telephone call				
personal visit				
Poster				
Leaflet				
Postcard				
info pack				
Letter				
ad other product				
CD				
Diskette				
Website				
WAP site				
mob. Phone text				
press conf.				
drama event				
Roadshow				
other pub. meeting				
<b>Ad hoc inputs</b>				
bus ticket offer				
bicycle offer				

A good example of input monitoring from the KOMIMO Week of the Soft Road User campaign is given below.

**Table 5.2: Example of inputs recording -Week of the Soft Road User 2002<sup>10</sup>**

Medium	(✓) tick those which apply	Design costs	Production costs	Distribution costs
<b>Geared to specific outputs (see Table under 'Outputs')</b>				
Newspaper – national	✓	7 870	5 000	2 770
Television – national	✓	41 267		185 523
Poster	✓	6 600	252	108
Newsletter	✓	1 010	740	155
Website	✓	1 250		
Press conf.	✓	1 355	90	1 722

#### Checklist on monitoring inputs:

- Keep careful records of staff time spent on the design and implementation of the campaign, including those from other organisations involved and any volunteer time.
- Make regular updates to records of the costs of the design process in the campaign planning phase, including any market research carried out to inform the campaign design process.
- Record all production costs – remember to include costs of any reprints or reruns.
- Note distribution costs and/ or any associated personnel costs related to the organising of the delivery process.

#### 5.1.3 Monitoring outputs

Outputs are the results of the campaign design process (leaflets, brochures, incentives, test tickets, posters, events, games etc). Monitoring the outputs helps to assess the amount of materials distributed or events run as part of the campaign. Campaign outputs should be linked with associated inputs.

Table 5.3 shows a completed monitoring table for outputs developed as part of TAPESTRY. It includes the same output categories as Table 5.1, covering media, printed materials or events. In addition, it enables you to record:

<sup>10</sup> The costs in the tables reflect the costs of the general media campaign of the weeks. It does not include the costs of the output of the individual projects. Costs in Euros.

- Pre-testing – Was the output pre-tested with the target group?
- Personalisation – Was the output directed to a particular person with their name on it?
- Where was the output distributed?
- Total exposures – What was the total number of people exposed to the output, e.g. radio station audience, newspaper readership etc?
- Target group exposures – What was the estimated number of people from the target group exposed to the output?
- Duration – How long was the output exposed? E.g. how long was the poster up, how long was the radio ad and how many times was it played?

**Checklist on monitoring outputs:**

- Maintain a regularly updated list of the outputs used for your campaign
- Make sure you try to obtain data on total exposures (i.e. radio & TV stations, audience ratings, newspaper/ magazine circulation or readership numbers)
- Keep track of how long the campaign material is shown or broadcast
- When calculating target group exposures, take account of any materials that were produced but not delivered

It is interesting to highlight here the implementation of the case studies developed in Gel and Mol (Belgium) where the campaign developers distinguished between media used to promote the campaign and those produced for the campaign itself. The distinction was made by using different colours of text depending on the nature of the medium, as shown in Table 5.3.

**Table 5.3: Example of Output Table from Geel**

Medium	Tick those which apply (✓)	Pre-tested (✓ if yes)	Personalised (✓ if yes)	Where*	Total exposures (estimated)	Target group exposures (estimated)	Duration (e.g. hours or days)
n'paper – national							
newspaper – local	✓				?	2500	1 (2) day(s)
magazine – national							
Magazine – local	✓				15000	2500	15 days
radio – national							
radio – local	✓				?	2500	3 days (3 minutes)
television – national							
television – regional	✓				500000	2500	5 minutes
telephone call							
personal visit							
Poster	✓		✓	3-7-9-11-12-14	?	2500	20 days
Leaflet	✓		✓ children and parents	3 – 9 – 11	4000	2500	10 days
Postcard							
Info pack	✓		✓ school level	3			Distributed Nov.2001
Letter	✓		✓ directors	3			3 times
School Travel Plan	✓		✓ school level	3	1000	1000	Half year in 8 schools
Bicycle leaflet	✓	✓	✓ 11-12 year olds	3	700	700	Distributed Sept.2001
CD							
Diskette							
Website	✓						
Ppt - presentation	✓		✓ local population	2 + 3		600	8 locations
Mob. phone text							
press conf.	✓		✓ press				1 hour
Car Free schoolday	✓		✓ school level	3	2500	2500	1 day
Slim traffic Event	✓		✓ 5 <sup>th</sup> classes	11		700	1 day
Traffic Educating Route (inauguration)	✓		✓ 10-12 year olds	3		500	1 day
Stage performance	✓		✓ 6-7 year olds	3		500	1 day

\* 'where' coding list

- |                              |                                      |
|------------------------------|--------------------------------------|
| 1) households (personalised) | 12) shopping centre / supermarket    |
| 2) households (general drop) | 13) doctors' / dentists' surgery etc |
| 3) school / college          | 14) park / other outdoor venue       |
| 4) workplace                 | 15) pub / café / bar                 |
| 5) on bus                    | 16) petrol / service station         |
| 6) on tram                   | 17) television                       |
| 7) bus station / stop        | 18) radio                            |
| 8) tram station / stop       | 19) newspaper                        |
| 9) library                   | 20) magazine                         |
| 10) billboard/hoarding       | 21) phone (fixed)                    |
| 11) leisure/community centre | 22) phone (mobile)                   |

Blue marked = media used to promote campaign

### 5.1.4 Efficiency performance measures

Various measures of campaign efficiency can be assessed by comparing inputs, outputs, exposure and outcome indicators. These comparisons can be made typically by taking *ratios* of these elements. This is only possible if the units used for each have been standardised and most of these outcome indicators are quantitative. (For more details about outcomes, see Section 6.)

For the four elements, six different types of ratio can be produced, each quantifying a different type of efficiency for appropriately selected pairs:

**Table 5.4 Different Possible Efficiency Ratios**

Name	Ratio	Example
Efficiency 1	Input / Output	Cost per 1000 leaflets
Efficiency 2	Input / Exposure	Cost per person in target group who recalls the campaign message
Efficiency 3	Input / Outcome	Cost per km reduction in car use
Efficiency 4	Outcome / Output	% increase in awareness per leaflet distributed
Efficiency 5	Outcome / Exposure	Increase in bus use per target person recalling the campaign
Efficiency 6	Output / Exposure	Number of leaflets produced per target person recalling the campaign

These efficiency measures offer enormous depth of scope in the range of specific ratios that may be calculated and interpreted. For example, any increase (or decrease) in awareness levels could be assessed for awareness of *specific* issues raised in any given campaign, by *specific* inputs (e.g. costs) invested in particular media (e.g. posters or leaflets), or by total costs, across all media. However, this sort of analysis requires a significant amount of detailed data and resources to process it.

Whilst these ratios may be assessed in their own right, comparisons with other campaigns are likely to be more informative, where similarity of campaign and prevailing conditions make such comparisons more meaningful. This may be done on a thematic basis, by selecting common themes (such as leaflets designed to change travel to school) and comparing such common efficiency ratios across appropriate campaigns.

Finally, even greater depth of understanding may be obtained by exploring what can be described as 'internal ratios', e.g. one impact indicator expressed as a ratio of another. An example here would be car kilometres replaced by sustainable-mode kilometres, expressed as a ratio of raised awareness for the environment (another impact indicator). Looking at these sorts of internal ratios would involve scaling up the results from the sample to cover the whole of the target group. Although not efficiency measures under the current definition, these ratios may be more important contributions to our understanding of the campaign processes.

Efficiency ratios should also be considered in the light of contextual information (external factors and non-campaign measures).

## 5.2 Problem identification and solving process and continual improvement of the implementation process.

To ensure your campaign is successful, one of the most important aspects is to be able to identify a problem promptly during the campaign, as well as to solve it. Mechanisms for problem identification and the continual improvement of the implementation process can help to ensure that campaigns are more effective.

- Definition of milestones and intermediary measurable objectives in order to assess the development of the campaign

The identification of problems during the implementation phase can be facilitated if milestones and/or intermediary measurable objectives are defined prior to the beginning of the campaign. If the campaign fails to meet them, this then acts as a warning signal. Once these signals are activated, a previously defined procedure should be followed, which enables the implementation phase to be re-orientated.

For example the initial stages of the Hampshire campaign implementation dealt with the selection and invitation of targeted people to meet for a 'learning network' (focus group). The low response rate to the invitation was interpreted as a problem for the campaign implementation. They realised the incentives they had proposed were not sufficient. As a result the initial meeting was cancelled and rearranged with additional incentives.

- Periodical campaign management meetings to identify any difficulties arising and to take corrective measures.

All those involved in the campaign implementation phase, including external staff contracted by the campaign manager, should meet periodically to discuss the development of the activities. They should be able to identify the aspects that do not work correctly and decide on any corrective or preventive actions needed.

These meetings could act as a mechanism to review the progress of the campaign in terms of the milestones or intermediary measurable objectives set out above.

## 5.3 Communicating with and monitoring the press

Monitoring any press coverage given to your campaign is an important part of the implementation process. The simplest way to carry out press coverage monitoring is to assign one person from the campaign team to review the media (newspapers and any radio or TV coverage) on a daily basis. This could be a relatively time-consuming task. However, in some cases, where your organisation has a press department, it may be possible to build it in to an existing press coverage monitoring process.

## 5.4 Monitoring of external factors and non-campaign measures

The monitoring of the external and non-campaign measures is as important as the monitoring of inputs and outputs because they enable a better understanding of the results obtained from the analysis of attitude or behaviour change data after the campaign. However, they are complicated to monitor as campaign managers do not have direct control over them, so it requires an additional effort to identify them so that they can be recorded.

Most of the external factors will by their very nature be impossible to predict in advance. It is advisable to establish a system for monitoring their occurrence so that their impacts can be taken into account in the final assessment. Table 5.5 is a suggested approach, developed as part of TAPESTRY and used by the majority of the TAPESTRY case studies. The column headings can be altered to reflect the campaign's duration.

**Table 5.5: External factors**

<b>Campaign Time scale</b>	<b>Month 1 –3</b>	<b>Month 4-6</b>	<b>Month 7-9</b>	<b>Month 10-12</b>
'Acts of God'				
Publicity (not linked to campaign)				
Political changes				
Other campaigns				
Terrorist attacks				
Any other factors: Helping campaign objectives				
Hindering Campaign objectives				

Campaigns are never implemented in isolation. As outlined in Section 2.1, they are usually part of an overall strategic plan. Therefore, it is important that other non-campaign measures that may also have an impact on the attitudes and behaviour of the campaign target group, are correctly identified and recorded.

This process can be carried out in different ways: contacting other departments within your own organisation, or other organisations working in the same area. Monitoring press coverage of issues related to your campaign is also crucial. Often measures still in the planning stage, such as traffic restraint policies, may have an impact on the attitudes of your target group.

### **5.5 Monitoring the target (and/or control) group composition.**

Even if the composition and sampling of the target and control groups are finalised prior to the implementation phase, in some cases ensuring the characteristics of these groups remain constant is essential for the rest of the implementation of the campaign.

It is important to make sure that the control and target groups have the required key characteristics such as population size, age or gender. Throughout the implementation phase, the composition of the target and control groups should be carefully monitored. Action can then be taken if any of the groups need to be readjusted.

For example the campaign developers for Vitoria-Gasteiz realised after the 'before' measurement phase had been carried out that the composition of the target and control group

samples was not representative of the population of Vitoria as a whole in terms of gender and age. The fact that the interviews were conducted by students had resulted in a bias towards individuals between 15 and 25. Similarly, the location selected for carrying out the target group interviews – a shopping arcade in the city centre – also negatively affected the composition of the sample.

The composition of the samples should have been continually monitored (every day throughout the interview phase) in order to re-orientate the interviews towards a more evenly distributed range of ‘customers’ so as to balance the composition of the samples.

## 6 MEASURING CAMPAIGN OUTCOMES

This section focuses on how to measure the outcomes of your campaign. For a more detailed guide on how to monitor and assess your campaign, in terms of methods of data collection and analysis, see the TAPESTRY Campaign Assessment Guidance (Revised Deliverable 3).

The guidelines presented below are not intended to be exhaustive: they can in no way replace the expertise of those who have training and experience in campaign assessment. However, they do provide a step-by-step guide to assist your management of the assessment process, whether this is carried out with the co-operation of others in your organisation, or by an external market research agency.

### 6.1 Why measure outcomes?

The outcomes of your campaign include:

- Campaign exposure – whether and how your campaign is received by the target audience
- Individual level impacts – the influence your campaign has on individuals' attitudes and behaviour
- System or social-level impacts – the influence your campaign has (through the collective individual impacts) on factors such as congestion, air quality, noise etc.

It is essential to measure outcomes, to see the extent to which the campaign objectives have been reached. This is particularly important if you need:

- To demonstrate, perhaps to your funding partners, that your campaign (or the approach you have taken) is a good investment;
- To determine which elements of your campaign were the most effective and efficient, to enable better informed planning of future campaigns.

Equally, for some types of campaign it can be very important to demonstrate success to those taking part, to help motivate them to continue and to provide evidence for future participants that such an initiative is worthwhile. A good example is a school-based campaign, where it is crucial to demonstrate to the children, parents and teachers that their efforts are having an impact, to help engage them in the campaign and to show other school communities that the approach you have taken can help their problems too.

#### TAPESTRY EXAMPLES

As part of the school-based campaign in **Gävle**, Sweden, a giant map was displayed in the school yard, with colourful drawings of various destinations around Europe and beyond plus their distance from Gävle. Using data collected each week on how each class had travelled to school, the combined distance travelled by walking or cycling was then marked on the map. This was very popular with the pupils and could also be seen by parents when they came to collect their children from school.

**Figure 6.1: Map at the Hageström school in Gävle****Figure 6.2: Ball Barometer in Linz school classroom**

One of the measures included in the campaign in schools in **Graz** and **Linz** was the use of a 'ball barometer'. Set up in one class in each case, the 'ball barometer' recorded how the pupils had travelled that day to school. Different modes had different coloured balls (e.g. public transport = green). It was combined with prizes each week, when the number of 'environmentally friendly' balls reached certain levels. As a daily reminder of their travel behaviour, the 'ball barometer' was very positively rated by the pupils.



## 6.2 Recommended methodologies for different types of campaign / budgets

### 6.2.1 Types of assessment

Different types of campaign require different assessment processes. However, before you decide how best to assess your campaign, you need to consider the type of assessment you require.

This will depend on two factors:

- Whether you need to be able to compare your campaign results with those from other campaigns;
- How rigorous you would like the assessment to be: the level of detail and accuracy you require from the results.

If you need to be able to compare your campaign results with those from other campaigns, or are planning a whole programme of linked campaigns (like TAPESTRY), then you will need to set up a standardised assessment process that enables comparison between different approaches. To make reliable comparisons, much of the data will have to be quantitative.

*‘Quantitative’ data refers to information that ‘quantifies’ or counts that which is being investigated. For example, “75% of people agreed that congestion was a problem”.*

*‘Qualitative’ data refers to information that ‘qualifies’ or describes that which is being investigated – especially attitudes. An example of qualitative data is the verbal responses given during a focus group.*

Even if you do not need to be able to compare the results of your campaign with others, a rigorous assessment, enabling you to obtain very detailed and accurate results, will also require a significant amount of quantitative data collection. You may choose to carry out this type of assessment if your organisation has not run campaigns or a campaign of a particular type before. The assessment process in this case may well require significant resources, perhaps even more than the campaign itself.

Even if you are using an approach that has already proven to be successful with similar target audiences, a rigorous, largely quantitative assessment will be useful, as it demonstrates the effectiveness of the approach taken and helps to add to the research base.

### ***6.2.2 Key steps in the assessment process for all types of campaigns***

For all campaign types, there are a number of key steps in the assessment process:

1. Selecting a part of the target group for the assessment process
2. Definition of a control group
3. Strategy for collecting baseline data before the campaign starts
4. Strategy for collecting data after the campaign or several times during and after the campaign (tracking)

Each of these steps is set out in more details below and more detailed worked examples of checklists for various campaign types are shown in annex 3.

#### ***6.2.2.1 Selection of part of the target group***

In some cases it may be possible to assess changes in attitudes and behaviour for all the target group(s) of the campaign. For example, for a campaign where the target groups are all those connected with travel to a particular school, it may be possible to carry out counts and surveys of all the children and their parents and teachers. However, in most cases, it will be

necessary to define a **representative sample** for the assessment process, which is likely to be a selection of the campaign target group(s). For example, it may only be possible to survey the pupils of a few classes in the school.

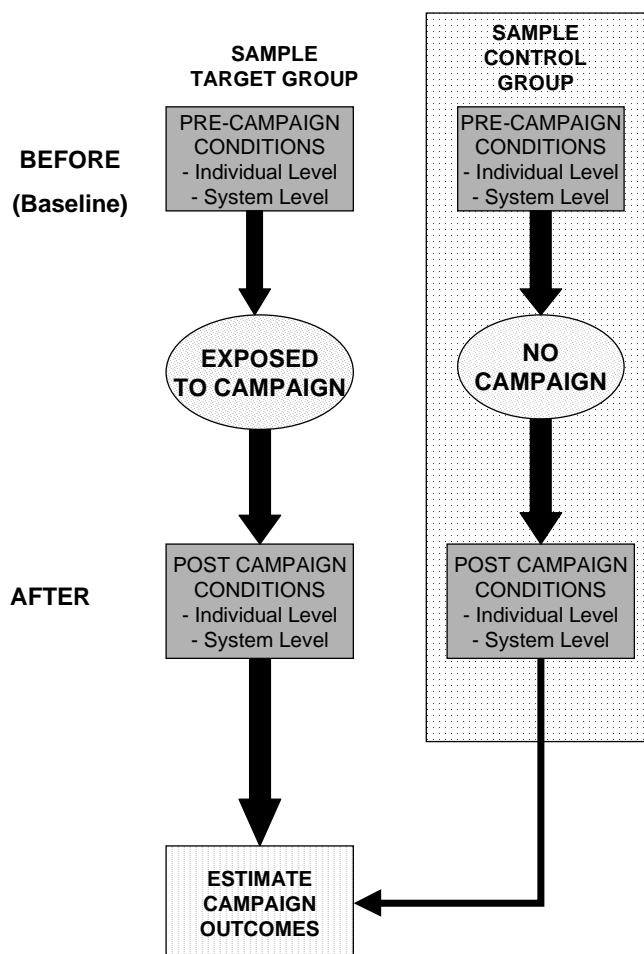
The first step in the assessment process is therefore to decide who will form part of this group. Where a quantitative survey is involved, this will mean that a sample of the target group has to be selected. (For more details see Section 6.4.) The basic principle is that the sample should be as representative as possible of the target group. Even if using a qualitative approach, it is important that the sample used is as representative as possible.

### 6.2.2.2 Definition of a control group

A control group is made up of those with similar characteristics to the target group. The only difference (ideally) between the two groups is that the control group will not be exposed to the campaign. This means that the control group should be just as likely to be influenced by non-campaign measures and external factors as the target group. The formation of the control group should be considered at the same time as the definition of the target group.

Figure 6.3 sets out the role of the control group in the assessment process.

**Figure 6.3: Identifying Campaign Outcomes with a Control Group**



The use of a control group adds to the expense and complication of the campaign evaluation but it also adds an extremely important component, as it enables the effects of the campaign to be isolated. Without a control group, you can never be sure that any changes you noticed were actually due to the campaign. Even if you carry out just a qualitative assessment, it may be useful to investigate the attitudes and behaviour of similar people outside the target group of the campaign, to gain a broader understanding of its influence.

#### TAPESTRY EXAMPLE

The **Nantes** campaign involved sending a targeted mailing to 2450 households along a particular bus route corridor. 400 households were then selected to form the target group sample. 150 households along the bus corridor, not sent the mailing, were selected to form a control group. Both groups were surveyed before and after the campaign using a telephone questionnaire. Changes in behaviour and attitudes were found in both the target group and the control group. Therefore, the use of the control group was crucial to understanding the true impacts of the campaign.

##### *6.2.2.3 Strategy for collecting baseline data before the campaign starts*

Once you have defined your target group and control group (where appropriate), the next stage is to collect data to form a 'baseline'.

Collecting 'baseline' quantitative data will help you form a picture of the situation before the campaign: both in terms of individual levels of awareness, attitudes and behaviour; and also at the social and system level (e.g. levels of congestion, air pollution, parking, etc).

Equally, when carrying out a more qualitative assessment, it is important to gain as broad a picture as possible of the situation before the campaign, through the use of methods such as focus groups.

The most important factor to consider with the collection of baseline data is that it must be collected before any aspect of the campaign has started. While this seems an obvious point, it is critical to build this phase into the planning and not to leap straight into campaign launch. This includes, for example, any preparatory work that involves explaining the purpose of the campaign to members of the target group.

More guidance on data collection can be found in Section 6 of the TAPESTRY Campaign Assessment Guidance.

##### *6.2.2.4 Strategy for collecting data after a campaign or several times during and after the campaign (tracking)*

Once you have collected baseline data, the campaign can start. The decision on whether to collect data only at a specified time after the campaign has been implemented, or at several times during and after the campaign, is largely dependent on the size and duration of the campaign and on the budget. In most cases, collecting one set of 'after' data is the most feasible option. However, where possible, collecting data at several points during and after the campaign – 'tracking' the progress of the campaign – has a number of advantages. For example, it can enable you to pinpoint more accurately the aspects of the campaign that are

working best (or not working at all) and see whether the impacts of the campaign are sustained after it has finished.

Whether you collect data just once after the campaign or use a tracking approach, it should be collected in the same way as the baseline data.

### **6.3 Measuring Individual Level Impacts - The importance of measuring change at sub-behavioural level.**

What do we mean by ‘individual level impacts’ and how can you measure them? As Section 1.1 sets out, campaigns can be a key tool in the process of changing travel behaviour. However, changing travel behaviour cannot be achieved quickly; it is the end of a long process that starts with raising awareness of the problems caused by car use and changing attitudes to sustainable modes. Campaigns are equally valid tools in the process **leading** to changing travel behaviour. Therefore, in order to assess their impacts, it is as important to measure changes in awareness levels and attitudes as to measure changes in travel behaviour.

#### ***6.3.1 Introduction to using the Seven Stages of Change model for assessment***

Each TAPESTRY campaign aimed to make a positive impact on the attitudes and behaviour of selected target groups towards sustainable transport modes. Using the results of the INPHORMM project and elements of the Theory of Planned Behaviour, a new model or ‘barometer’ (see Figure 1.1) was developed for TAPESTRY. Its aim was twofold: firstly, to assist the campaign initiators in the planning and targeting of their campaign; and secondly, to provide a ‘process of change’ scale against which the attitudinal and behavioural impacts of a campaign could be measured. By measuring the number of people who are at each stage of the scale ‘before’ and ‘after’ (or when not appropriate, ‘with’ or ‘without’) the campaign, an assessment can be made of the extent to which a campaign has moved individuals in the target groups towards changing their travel behaviour.

The model sets out a seven stage process:

1. Awareness of problem or opportunity
2. Accepting responsibility or relevance
3. Perception of options
4. Evaluation of options
5. Making a choice
6. Experimental behaviour \*
7. Habitual behaviour \*

The overall impact of a campaign on the behaviour of the target population can be assessed by measuring changes in modal split (i.e. percentage of trips by mode), by using a travel diary or related data.

The model can be applied to the majority of campaigns that seek to change travel behaviour through modal shift. However, campaigns can also achieve changes in behaviour through promoting objectives such as avoidance of travel, changing type or length of trips or changing the time of travel.

Each stage of the process can be influenced not just by the campaign, but also by other external or exogenous factors. Measuring the impacts of the campaign has therefore to be combined with measuring specifically declared campaign effects *and* more general campaign recall, as well as recording the possible impacts of other non-campaign measures or external factors (see Section 6.6.1).

*\* NB: The distinction between experimental and habitual behaviour will not be relevant in all cases (e.g. for a tourist making a one-off trip to an area), and where it is relevant – in the case of relatively frequent trips - it will not always be possible to design surveys to pick up these two stages separately.*

### 6.3.2 Types of questions relating to the Seven Stages of Change

This section sets out a number of recommended question types, which can enable you to track where your target audiences are in terms of changing travel behaviour. More details of the questions used by TAPESTRY can be found in the Campaign Assessment Guidance (Revised Deliverable 3).

#### 1 Awareness of problem

Two types of question are best suited to this stage.

- i) Asking respondents to rate how serious they find a problem caused by car use, e.g. pollution, congestion, poor health, noise etc.  
This approach could also be used in a focus group session, to explore what people feel about transport problems.
- ii) A statement about the particular problem you have chosen to address with your campaign, followed by an agreement scale response, e.g. “Congestion is a serious problem for our city” (response: strongly agree // agree // neither agree or disagree // disagree // strongly disagree).

#### 2 Accepting responsibility

As this stage aims to find out the level of personal responsibility the respondent feels for the problems being addressed by the campaign, questions that use statements in the first person are most appropriate here.

E.g. “My car use is contributing to the congestion problems in our city”.

Again, an agreement scale response is best.

A more direct question e.g. “Do you feel you should cut down on your own car use to help solve the problem of congestion?” would be appropriate for a focus group session.

#### 3 Perception of options

This stage requires two question types: one concerning the respondent’s perception of the performance of the car and alternative modes; and the other to establish the degree to which the opinions of others (family, friends, colleagues) have an impact on the way the respondent perceive alternative modes.

The first type should include three elements: (i) a list of attributes for transport modes, such as speed, reliability, comfort, safety, cost etc.; (ii) the modes concerned (usually the car and the main targeted modes for the campaign, such as bus, bicycle, etc); and (iii) an agreement scale response.

The second type is best set out as a statement, with an agreement scale response. However, the way in which you word the question will depend very much on your local cultural norms. In addition, you may need to de-personalise the statement, so that the respondent feels more comfortable about answering it honestly. For example, “Do you think most people would cycle more if their friends did?” (This is known as “projection” in market research.)

Both question types could be adapted for use in a focus group. A list of attributes for transport modes would provide a starting point for a discussion about which could be applied to the car and which to the alternative mode promoted by the campaign. The second question type could be used to prompt a discussion on whether friends, colleagues and family members influence how travel choices are perceived.

***Questions from this stage onwards should focus on a particular journey type / time of day, depending on your campaign objectives.***

#### 4 Evaluation of the options

Once you have explored respondents’ perception of difference modes, you will need to find out how important they regard each of the attributes you listed (speed, reliability, comfort, safety, cost etc.). This is best set out as a grid with the list of characteristics along one side, and an importance scale on the other. Again, this should be for a specific journey type/ time of day, depending on your campaign.

If you have sufficient resources, you could also use a Stated Preference survey to explore this stage in more detail (see the TAPESTRY Campaign Assessment Guidance, Section 6 for more details).

In a focus group setting the same list of attributes could be presented with a question asking which aspects people found to be most important for a particular type of trip.

#### 5 Making a choice

This fifth stage looks at whether the respondents, having weighed up the options, are intending to switch to the alternative mode promoted by the campaign. A statement with an agreement scale is the best approach. For example: “I intend to use the bus next time I go to the city centre to shop.”

However, in order to find out whether the choice has been made due to the campaign or to other factors, a question asking about the reason could also be included (see ‘Experimental and Habitual Behaviour’ below for more guidance).

This stage would be more difficult to explore in a qualitative way. However, it could be part of a more general discussion on the modes people choose to use most regularly and why.

#### 6/7 Experimental & Habitual Behaviour

The final two stages require similar techniques; changes in habitual behaviour, however, are more difficult to measure, unless you are carrying out a series of ‘after’ questionnaires.

Here we are interested in measuring two things:

- Whether any **changes** in travel behaviour have occurred
- The **reasons** for such changes (i.e. whether due to the campaign or some other factor)

Since a proportion of the target population changes behaviour at any point in time (due to population and employment turnover), it is important to ask about behavioural change **in the ‘before’ as well as in the ‘after’ surveys**, and the reasons for such change.

Core aspects of **travel behaviour** to be measured include:

- Mode of travel
- Trip length and/ or trip origin and destination
- Trip purpose
- Frequency of travel

This information may be obtained in a variety of ways (see TAPESTRY Campaign Assessment Tool Section 6), either by targeting particular trips, or by recording travel over given time periods (e.g. one-day or multi-day travel diary).

There are two general settings in which questions on behavioural change (including intended change) can be posed:

- (i) In the course of a trip (on-mode or at the destination): here information collection will focus on that (type of) trip.
- (ii) At the respondent’s home (or workplace): here information collection may span a variety of trips, over one or several days.

It is also necessary to establish whether travel behaviour has **changed** as a result of (or, in the case of a one-off trip, been influenced by) the campaign, or by external factors. And then (where the trip is made on a regular basis), whether this represents experimental behaviour or a permanent shift in behaviour. This can be done:

- By comparing reported behaviour at two points in time (e.g. comparing travel diaries recorded by the same respondent ‘before’ and ‘after’ the campaign).
- By asking the respondents directly whether they have changed their travel behaviour.

***NB:** The distinction between experimental and habitual behaviour will not be relevant in all cases (e.g. for a tourist making a one-off trip to an area), and where it is relevant – in the case of relatively frequent trips - it will not always be possible to design surveys to pick up these two stages separately.*

### **Reasons for (Intended) Change**

Respondents may report a change in actual or intended travel behaviour for a whole variety of reasons, some to do with the campaign, but many for other reasons too. The rate of ‘turnover’ in the use of a public transport service may range between 20% and 50% per annum – without a campaign or any major change in service provision.

Reasons for change can be grouped into:

- Personal circumstances (e.g. change in home or work location, retirement, disqualification from driving).
- Transport system characteristics:
  - ‘objective’ improvements in service provision (higher frequencies, new buses, etc.)
  - ‘subjective’ improvements, brought about by changes in perception – usually as the result of a campaign.
- Other external or contextual factors (see Section 5.4), such as fuel price increases, severe flooding, etc.

For details of the specific questions used by the TAPESTRY campaigns and suggestions for questions suitable for children, see the TAPESTRY Campaign Assessment Guidance.

### 6.3.3 *Uses and abuses of examining the link between campaign recall and changes in attitudes and behaviour*

It is important to attempt to see whether any changes in behaviour or attitude have been due to the campaign itself, or to other external factors or non-campaign measures. One way to do this is to look at campaign exposure, i.e. whether the campaign has been received by the target audience(s). Unfortunately, campaign reception is very difficult to measure. It is possible to measure whether people consciously remember seeing or hearing about elements of the campaign. This is called ‘campaign recall’. However, this does not take account of any subconscious or subliminal responses to the campaign. Therefore, measuring levels of campaign recall, however sophisticated, cannot tell you the full story.

Even if it is not a perfect measure of campaign reception, campaign recall can give a useful insight into whether the campaign has had an effect. Campaign recall can be tested in two ways:

- Prompted recall: by asking the respondents whether they have seen/ heard a particular aspect of the campaign, e.g. showing them an image used on campaign material or by describing what the campaign aimed to do, for example: “There has been a campaign promoting bus use in the last 3 months. Have you seen/ heard anything about it?”
- Unprompted recall: by asking a more general question about whether the respondent has seen/ heard about any campaigns relating to the broad area of your campaign, e.g. “Have you heard/ seen a transport-related campaign recently?” It is more common with unprompted recall questions for a space to be left for respondents to write in their own response.

For both approaches, a question should then be asked about recall of the specific campaign messages. An example follows:

**Which of the following messages was the campaign trying to get across?**

- |   |     |
|---|-----|
| I don’t remember  | [ ] |
| [cycling to school is quicker than going by car]        | [ ] |
| [cycling to school is healthier than going by car]      | [ ] |
| [walking to school is quicker than going by car]        | [ ] |
| [walking to school is healthier than going by car]      | [ ] |
| [going by car to school is the safest way to get there] | [ ] |

[going by car to school is the most comfortable way to get there]

**Please tick as many boxes as apply, or just the first box.  
Please tick what the campaign messages were, not your opinion!**

For children, a single question could be used:

**Do you remember seeing/ hearing anything about [travelling to school] in the last [2] months?**

No, [I don't think this has happened at our school yet] <sup>a</sup>

Yes, the message was "cars are a safe way to travel"

Yes, the message was "cars are a fast way to travel"

Yes, the message was "cycling helps to reduce congestion"

Yes, the message was "cycling is a fast way to get to school"

Yes, the message was "there are too many bicycles on the road"

Yes, the message was "our parents should never use their cars"

*a) reduces pressure bias – ie feeling they ought to have heard of campaign, and thus guessing*

In addition to asking whether respondents have seen or heard about the campaign and whether they remember the message, it is useful to get some feedback on whether it was received positively. For respondents who have remembered the campaign, TAPESTRY used the following responses.

- |   |                          |
|---|--------------------------|
| 1) I found it interesting                   | <input type="checkbox"/> |
| 2) It was well designed                     | <input type="checkbox"/> |
| 3) It was directly relevant to me           | <input type="checkbox"/> |
| 4) It made me think about my use of the car | <input type="checkbox"/> |
| 5) I agreed with what was being said        | <input type="checkbox"/> |
| 6) It seemed irrelevant to me               | <input type="checkbox"/> |
| 7) It had no affect on me at all            | <input type="checkbox"/> |
| 8) I found it irritating                    | <input type="checkbox"/> |

A good way to test whether the respondent has correctly identified your campaign is to include a question on where they saw / heard about it:

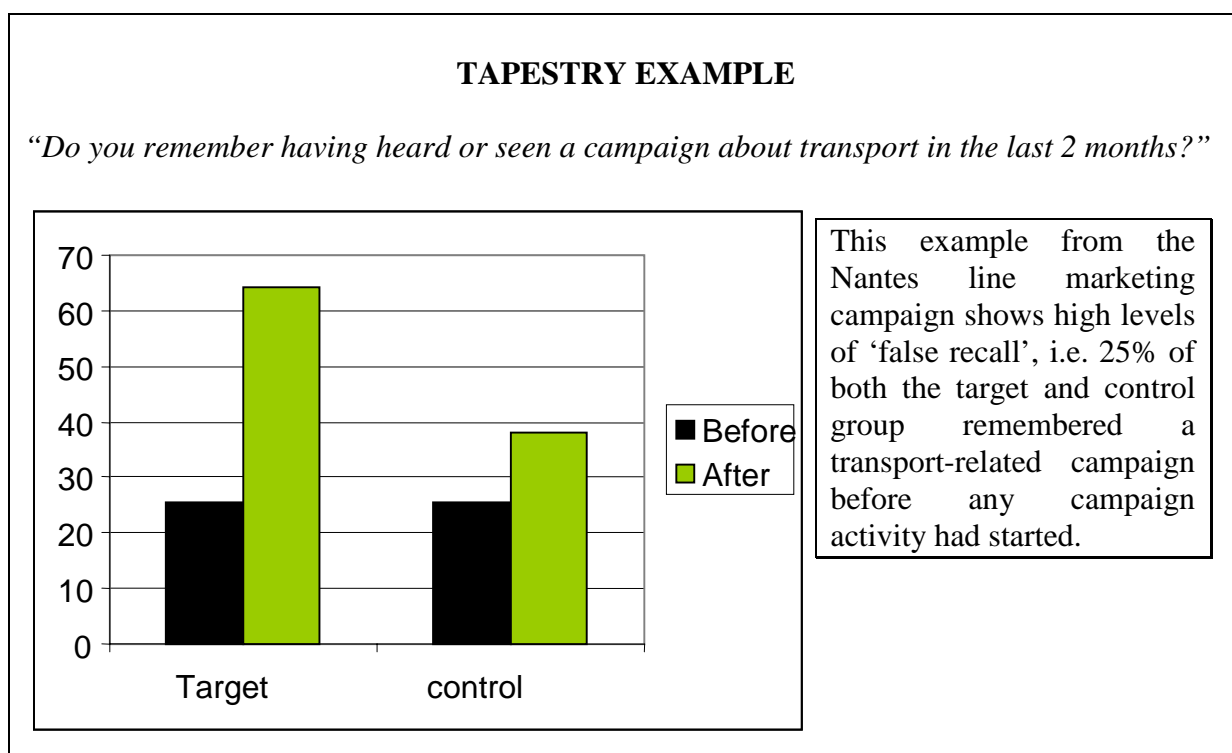
And where did you [see this]?

- |                              |                          |                                      |                          |
|------------------------------|--------------------------|--------------------------------------|--------------------------|
| 1) own home                  | <input type="checkbox"/> | 12) shopping centre / supermarket    | <input type="checkbox"/> |
| 2) other's house             | <input type="checkbox"/> | 13) doctors' / dentists' surgery etc | <input type="checkbox"/> |
| 3) school / college          | <input type="checkbox"/> | 14) park / other outdoor venue       | <input type="checkbox"/> |
| 4) workplace                 | <input type="checkbox"/> | 15) pub / café / bar                 | <input type="checkbox"/> |
| 5) on bus                    | <input type="checkbox"/> | 16) petrol / service station         | <input type="checkbox"/> |
| 6) on tram                   | <input type="checkbox"/> | 17) television                       | <input type="checkbox"/> |
| 7) bus station / stop        | <input type="checkbox"/> | 18) radio                            | <input type="checkbox"/> |
| 8) tram station / stop       | <input type="checkbox"/> | 19) newspaper                        | <input type="checkbox"/> |
| 9) library                   | <input type="checkbox"/> | 20) magazine                         | <input type="checkbox"/> |
| 10) billboard/hoarding       | <input type="checkbox"/> | 21) phone (fixed)                    | <input type="checkbox"/> |
| 11) leisure/community centre | <input type="checkbox"/> | 22) phone (mobile)                   | <input type="checkbox"/> |

Similar questions could be asked in a focus group session to stimulate discussion on which elements of your campaign made the greatest impact.

If you are carrying out a more rigorous quantitative assessment, it is very important to include the more general questions on campaign recall in your 'before' survey. This is often overlooked, but is essential in measuring the respondents who say that they have seen or heard of the campaign before it has even started. This type of 'false recall' can then be taken into account when you compare the results of your campaign with levels of campaign recall after your campaign.

Finally, an important way to measure subliminal campaign effects is to look at specific changes in awareness and attitudes in the target group, which are not observed in the control group.



#### **6.4 How to administer the questionnaire / Information needed to brief a market research agency**

Having presented some of the questions that you can use to measure changes in attitudes, behaviour and campaign recall, this section sets out a checklist of the steps you should consider if you have chosen to carry out a quantitative assessment, using a questionnaire before and after your campaign.

The checklist can be used in two ways:

- i) Within your own organisation, if you have the resources and skills to carry out the assessment yourself
- ii) To help choose and brief an appropriate market research agency, who can carry out the assessment for you

### **Step 1 – ‘Matched’ or ‘Independent’ samples?**

There are two basic ways of drawing samples when conducting ‘before’ and ‘after’ studies. You can either collect two **independent** samples, where you put your questions to two **different groups** of people at different points in time (and the choice of respondents in the one sample does not affect the sampling in the other); or you can ask the **same people** the same questions each time, giving you a **matched** sample. The type of sampling used determines the types of statistical tests that may be applied.

Matched sampling relies on the fact that you can properly match these same people up in the two samples, for example in a ‘before’ and an ‘after’ survey. In this way you can compare the ‘before’ and ‘after’ observations in the same individuals, and determine the net direction of change. This is statistically more powerful as you are measuring changes for specific individuals. With two repeated independent samples you are comparing aggregate (higher level) changes between each sample, which is less powerful.

The advantages of collecting matched samples are that this sampling is more efficient than independent sampling. This means that for the same sample size (and, importantly, often for the same market budget) you are more likely to be able to identify real changes that have occurred.

If you have got the same class of schoolchildren for both a ‘before’ and an ‘after’ survey, but you cannot match individual children’s answers up for each question, then you cannot treat this as a matched sample. In such a case, you would have to treat the data as two independent samples, and it would then have been better to have collected two completely independent samples in the first place.

The disadvantage of collecting matched samples is that they may require more administration in terms of actually getting the matching right (i.e. the records you keep and the way you enter the data is more complicated) and there may be issues regarding confidentiality, as people could object to having their names recorded. There is a solution to the latter problem, in that it is perfectly possible to carry out anonymous matched samples, where the actual names of the respondents do not appear on the questionnaire at all. This requires good survey administration, and the respondents must trust the people carrying out the survey. Attitudes to such approaches will vary from culture to culture, and according to the sensitivity of the data being collected. In addition, with matched samples, it is very likely that some respondents will drop out after being questioned a first time. It is therefore necessary to take account of this factor (known as attrition) when calculating sample sizes and the number of questionnaires to be carried out.

From the above discussion it will be concluded that the advantage of independent samples is that they are easier to administer, but that they typically require larger samples in order to identify statistically significant changes. Or, put another way, sampling, say, 500 people in a ‘before’ and an ‘after’ survey, you are less likely to identify true changes with independent samples, because the types of statistical test applied are more conservative.

As a final consideration, it is worth pointing out that independent samples also have another advantage. If two surveys are to be conducted within a short period of time, it may be prudent to collect independent samples, as you will be less likely to irritate your respondents. If you ask the same group of people the same sets of questions within a couple of weeks, the quality

of the response is likely to go down in the second survey – therefore it is better to select a new group of people.

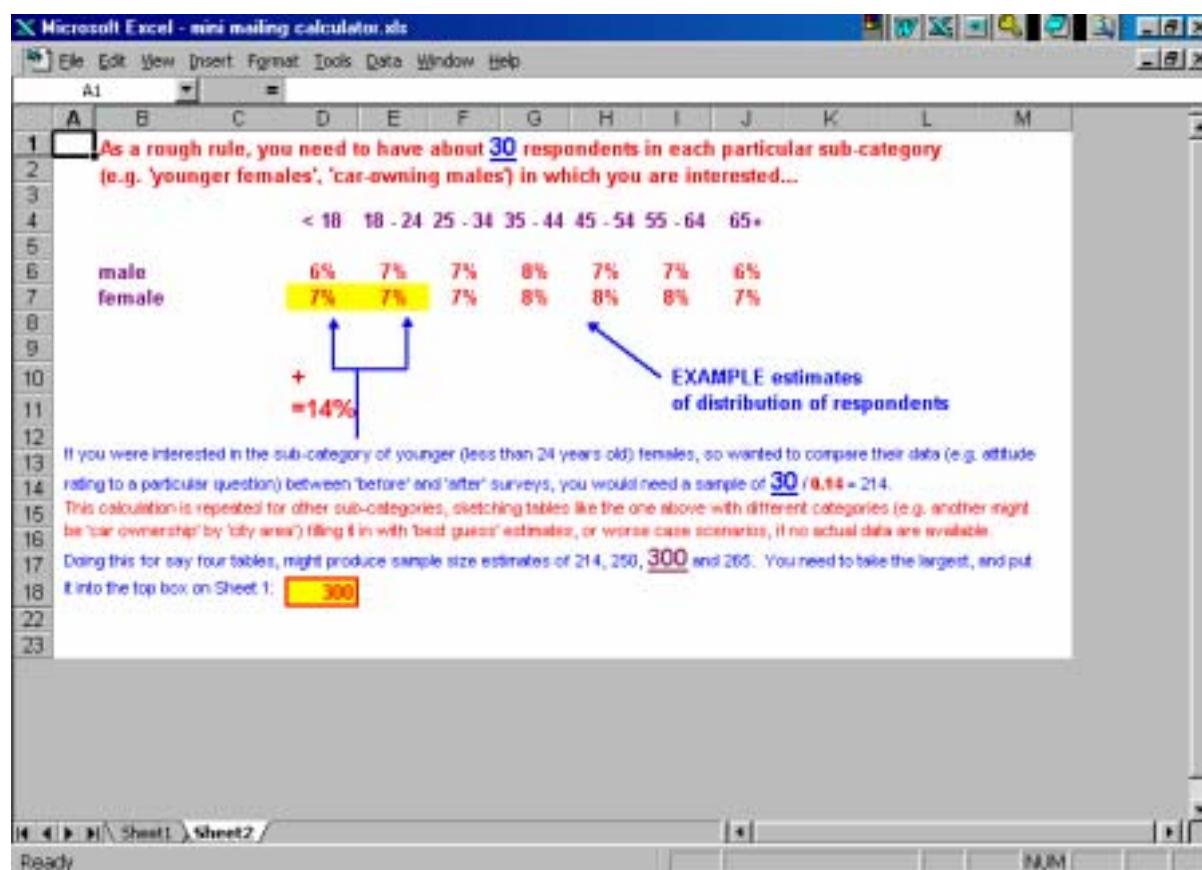
In summary, the choice of whether to have independent or matched samples is a question of balancing the advantages and disadvantages of each to meet the needs of your particular survey. Whilst on the whole matched samples are preferable, there is no point pushing for this if the quality of the data may be jeopardised as a result.

**Step 2 – Determine your sample size**

It is unlikely that you will be able to afford to question the entire target population (i.e. take a census), so you will have to take a sample. The crucial issue is to take a sample that is representative of the target population. All else being equal, larger samples are more likely to be more representative, although the rates of improvement in the precision decrease as your sample size increases.

As a rough rule, you need to have about 30 in each particular sub-category in which you are interested (e.g. females under 25). An example of how such calculations can be done in practice is given in Figure 6.4 (related to Figure 6.5 on the next page).

**Figure 6.4: Sample size calculator (Sub-categories)**



If you are using mail-back (postal) questionnaires, then the number of questionnaires you sent out will need to take into account:

- **response rate** = the proportion of people that normally respond to postal questionnaires in your city / area (e.g. 60% or 50%)

- **attrition rate** = the proportion of people who responded to your ‘before’ questionnaire, but not to your ‘after’ questionnaire. This applies to **matched samples only**.

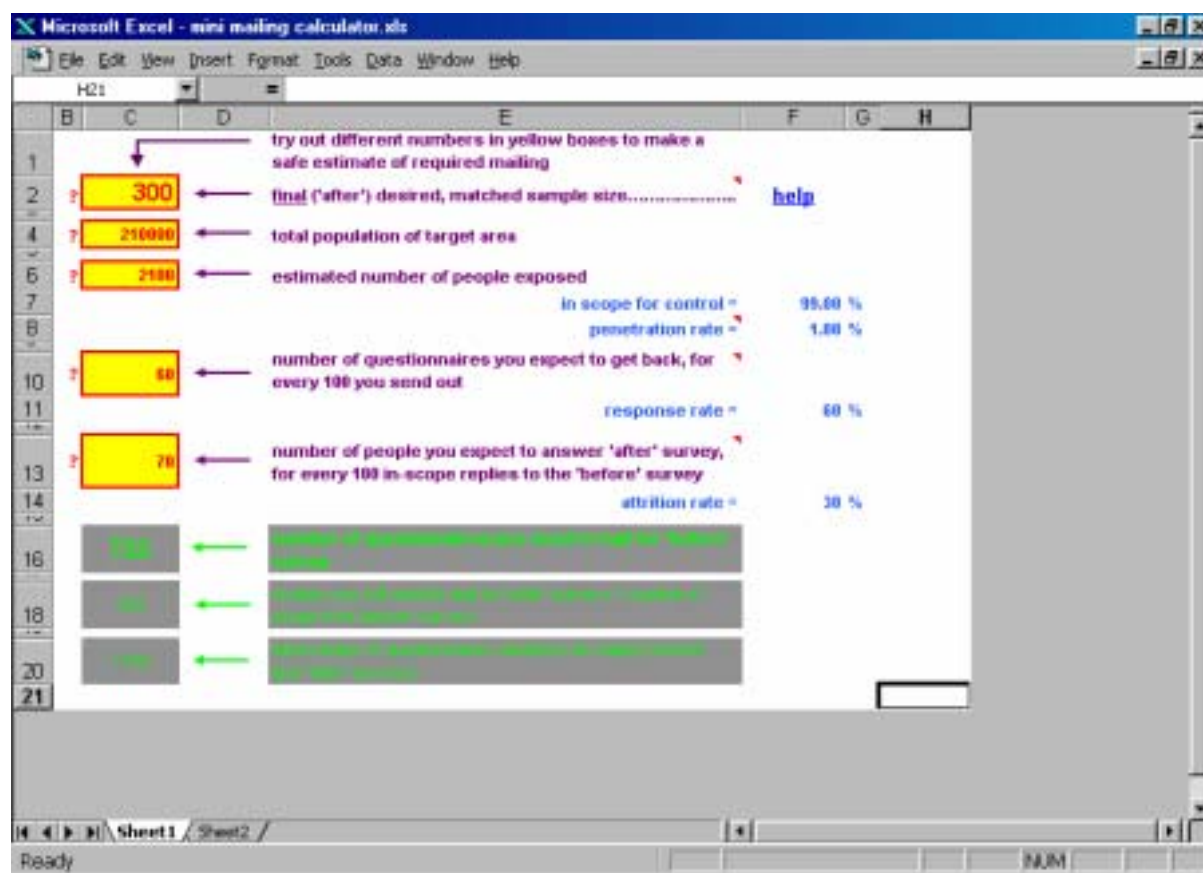
To calculate the number of questionnaires you need to send out for an independent sample of a given size, take your desired sample size and divide it by the response rate, expressed as a follows 60% = 0.6, 50% = 0.5, 45 % = 0.45 etc.

For example, if 300 was your desired sample size and 60% your expected response rate:  $300 / 0.6 = 500$  therefore you would need to send out 500 questionnaires to get your full sample size back.

The procedure for determining the gross sample size for a matched sample needs to be taken into account both in the response rate and in the attrition rate.

The Excel tool, illustrated in Figure 6.5 can help you calculate the exact number of ‘before’ questionnaires you need to mail out to achieve the correct matched sample size.

**Figure 6.5: Excel Sample Size Tool**



**Step 3 – Type of sample**

After deciding the sample size, you must select the respondents.

There are two main types of sample:

- **'Probability sample'** when the selection procedures are statistically randomised
- **'Nonprobability sample'**, e.g. by use of quotas (specifying that you need certain numbers of different types of people in various sub-groups).

If you want your survey to reflect accurately the target population's opinions, you must ensure that the percentages of older and younger people in your sample, for example, reflect their percentages in the target population.

### Probability Samples

The most common random sampling protocols (probability samples) are **stratified sampling** and **cluster sampling**.

In the *stratified method*, the population is divided into subgroups or *strata* (e.g. by income), that must be mutually exclusive and exhaustive. In other words, each person can only be allocated to one stratum, and no person can be omitted. Your sample is then randomly drawn within each stratum.

In the *cluster method* the population is also divided into subgroups, here called *clusters*, which are also mutually exclusive and exhaustive. Such clusters may be based on geographical area, for example. Your sample is then randomly drawn from the clusters. This means that either all members of a cluster can be included in the sample, only a part of them, or none.

The main distinction between the two methods is that in cluster sampling only a sample of subgroups (clusters) is chosen, whereas in stratified sampling all the subgroups (strata) are selected for further sampling. In addition, the objectives are also different: cluster sampling intends to increase the sampling efficiency by reducing the costs, whereas stratified sampling is designed to increase statistical precision.

**Nonprobability** samples include:

<i>quota samples</i>	chosen to ensure representativeness of the target population. Need to ensure target data are recent and easy to classify for sampling purposes.
<i>convenience samples</i>	based on the convenience of the sampler/ interviewer; might use for cheaply pre-testing a questionnaire (but beware of lack of representativeness).
<i>judgement samples</i>	based on (expert) judgement (e.g. which schools to sample) rather than random selection. May be good for selecting relatively small samples (where random selection might not be effective), but poorer approach for larger samples.
<i>purposive samples</i>	chosen intentionally not to represent the general population, but to oversample key groups, such as bus users, or people with very low incomes, for example. This type is good for focus groups.

The main differences between probability and nonprobability samples are that probability samples usually:

- cost more
- take longer to collect

but

- allow statistical tests to be carried out on the data
- produce relatively low bias

Note, however, that whilst a probability sample is more likely to be representative, this cannot be guaranteed, although the chances do improve with sample size.

**Step 4 – Timing of questionnaires**

When deciding when to administer your questionnaire, consider the factors shown in the following table:

**Table 6.1: Factors when deciding questionnaire timing**

Time of year	Winter, summer	e.g. adverse weather will often cause less travel, but more car use. Cycling and walking will be less popular.
Time in school year	School term time / school holidays / school return after summer	e.g. new travel patterns are established at the beginning of the school year (Aug / Sept). School holidays usually mean less traffic.
Day in week	Monday, Tuesday, Saturday etc	e.g. weekends will produce different travel patterns from weekdays, Monday and Friday tend to be effected by weekends
Time of day	Morning, afternoon, evening	e.g. if carrying out telephone surveys, daytime respondents are more likely not to be employed

**Step 5 - Questionnaire design**

Some key pointers on questionnaire design are as follows:

General

- Keep it short, simple, and to the point
- Maintain the respondent's interest with 'bridging' statements (short explanatory links between sections), positive feedback and short introductions where appropriate.
- The general tone should be friendly, although take care not to patronise (especially with professional stakeholder interviewers).
- Make every effort not to ask 'leading' questions which will bias the response in one way or another (this is very difficult to avoid completely).

- Questions should be unambiguous: avoid jargon, acronyms, complicated words, vague words and technical terms. If you have to use special terms, make sure they are clearly defined to avoid confusion.
- Questionnaire layout is very important. As far as possible it should be appealing/easy to complete (especially important for self-completion questionnaires). Any instructions on routings (which questions to answer) should be clear.
- Ask yourself what you will do with the information from each question. If you cannot give yourself a satisfactory answer, leave it out. Avoid the temptation to add a few more questions just because you are doing a questionnaire anyway.

#### Responses

- Remember that free-response questions (where the respondent is free to write in what they want) are very useful, but very time-consuming and expensive to process.
- Don't leave big gaps for short answers: it might put people off writing anything at all (but make sure you leave enough space, too).
- 'Closed' questions (with a pre-determined list of responses) are quicker for interviewees to answer, and cheaper to process. However, make sure all alternatives are covered (see following points).
- Allow 'Don't know' or 'No experience' or 'Not applicable' responses, if they are appropriate.
- Include 'none' and 'other' categories where appropriate - but bear in mind the latter will be expensive to code later if the respondent is asked to specify detail

#### At the start...

- A good introduction will encourage people to participate. Include any appropriate information on confidentiality.
- You may need 'screening' questions at the start (e.g. to exclude households with no children, or without a car).
- Start with general, easier questions, if you can. Also, if at all possible, put the most important questions into the first half of the survey. (If a person gives up half way through, at least you have the most important information. You must, however, respect the interviewee's right to stop the interview and not to have their responses used, if they so request)

#### At the end....

- Leave sensitive/ demographic questions (employment / income, education, age, sex etc.) until the end of the questionnaire. By then the interviewer should have built a rapport with the interviewee that will allow more honest responses to any more personal questions.

- Bear in mind data entry implications. Pre-coding (numbering responses) and questionnaires which are easy to read after they are completed (by data entry staff) may very significantly reduce data entry costs
- Finally, it is difficult to think of everything! Always test ('pilot') the questionnaire before you start the fieldwork for real.

**Step 6 – Carrying out your questionnaire**

There are four main ways to carry out your questionnaire:

**Face-to-face (personal)** - the interviewer asks questions face-to-face with the interviewee. Personal interviews can take place in the home, at the workplace, at a shopping precinct, on-street, outside a train station, in-vehicle, etc. Where the interview is computer based, it is referred to as a CAPI interview (computer-assisted personal interview).

**Telephone (CATI)** - surveying by telephone is one of the most popular interviewing methods in several countries, especially those where the telephone ownership rate is high. With the increase in use of the mobile phone, however, some younger people (in particular) may no longer have a fixed telephone in their home (and poorer people may not be able to afford one) and an increasing number of people use answerphones to screen their calls. CATI is Computer-Assisted Telephone Interviewing – most large market research agencies offer this service.

**Postal** – Postal interviews do not require an interviewer, so questionnaire design (see previous step) is particularly important. Questionnaires can be posted (mail-out, mail-back system) or given directly by hand to potential interviewees (drivers, pedestrians, etc.). Reply-paid envelopes usually help with response rates, but may not be needed if questionnaires are sent to large workplaces where respondents can just drop their responses in the company mail. Small incentives/ prizes may increase the response rate, but interest/ relevance of questions to the respondent is more important.

**Web-assisted personal interview (WAPI)** – this technique uses the World Wide Web to reach the interviewees. Web surveys are rapidly gaining popularity: they have major speed and cost advantages, but also major sampling limitations. At this stage, it is advisable to use WAPI for surveys only when the target population consists entirely of Internet users, rather than surveys of the general population. Software selection is especially important. It is advisable to check that the survey software prevents people from answering more than one questionnaire.

**Table 6.2: Comparison of questionnaire delivery mechanisms**

	Response rate	Cost	Quick to carry out	Quick to get results	Sample bias
<b>Face to Face</b>	++	-	-	+	+
<b>Telephone</b>	+	+	++	++	-
<b>Postal</b>	--	+	+	-	--
<b>Web</b>	-	++	++	++	--

++ good + fair – poor -- very poor

## 6.5 Recommended other data collection – Measuring System or Social Level Impacts

Some campaigns will aim not only to influence the attitudes and behaviour of individual travellers, but also to have an impact on the performance of the relevant transport systems. The analysis of these impacts will enable the assessment of some of the wider benefits for society, such as reduced congestion levels, better air quality, reduced noise and accidents.

The indicators you choose will relate closely to campaign objectives and the higher level strategic policy objectives. Therefore, in some cases only a selection of the following will be measured.

Key indicators include:

- Traffic volumes
- Road traffic volumes – (at selected locations)
- Bus/tram passenger volumes
- Walking volumes
- Cycling volumes
- Pattern and level of parking activity
- Public transport punctuality
- Air quality measurements
- Noise measurements
- Accident data

For each relevant category, data should be collected before and after the campaign, according to the guidelines set out in the TAPESTRY Campaign Assessment Guidance, Section 6.

Collecting data on traffic volumes will enable interesting comparisons with any changes in behaviour recorded by your questionnaire. This will be the case in particular where your campaign has been targeted at a specific area or journey type. For most campaigns, it will also be necessary to measure changes in public transport volumes or walking and cycling volumes, according to your campaign objectives, in order to demonstrate any shifts to sustainable modes.

Tracking public transport punctuality can be an indirect way to measure congestion levels. Looking at changes in the pattern and level of parking activity may also be a useful way to record changes in car use.

Both air quality and noise measurements can reflect changes to the wider environment or the quality of life in the area targeted by the campaign. Where the campaign objectives include reducing local air pollution and improving the quality of life of the target group, then these measurements can be a useful barometer of progress.

Finally, data on road traffic accidents may be collected where the campaign seeks to improve road safety, either through the increased use of cycling and walking or through a reduction in car traffic. However, it is usually necessary to collect three years of ‘after’ data before any impacts can be reliably determined.

### TAPESTRY EXAMPLES

In **Hampshire**, where the campaign aimed to boost rural bus use, full-classified traffic counts were carried out. In addition, data on bus patronage, cycle and pedestrian flows for the specific campaign area were collected.

In **Nantes**, bus patronage data was collected on the line being promoted, and then compared with data collected for the whole bus network and with data from the same month in the previous year.

In **Gävle**, at the Hageström school, counts were made before, during and after the campaign of the number of bicycles parked at the school.

## 6.6 Identifying the impacts of your campaign

Once you have the results from measuring your outcomes (both individual level and system level impacts), it is then possible to estimate the success of your campaign, by linking outcomes to objectives, inputs, outputs and external factors. A key part of this process is to establish as far as possible what are the real impacts of your campaign and what has been the influence of other external factors or perhaps non-campaign measures. This is called 'attribution'.

### 6.6.1 Attribution using a control group

Where a control group has been used to collect data on those people not exposed to the campaign, attributing the outcomes of the campaign is made much easier. If members of the control group have similar characteristics to the target group and data are collected at the same time as from the target group, then it can be assumed that any external factors or non-campaign measures will have had a similar impact on both groups. Therefore, any changes observed in the target group, but not in the control group, can be attributed to the campaign with more confidence.

This form of attribution is the strongest that can be made, particularly when combined with examining external factors and campaign reception.

### 6.6.2 Examining the role of external factors

Where it has not been possible to use a control group, it is even more important to monitor any external factors that might have influenced the outcome indicators (See Section 5.4).

By examining external factors and non-campaign measures in parallel with the campaign outcomes in the target group (and the data collected from the control group, if used), it is possible to make some estimation of what can be attributed to the campaign. However, even a very thorough examination cannot replace the more accurate attribution that can be made when a control group has been used.

### **6.6.3 Examining Campaign Exposure – the role of measuring campaign recall**

The final factor to be examined in the attribution process is campaign exposure. As illustrated by Figure 1.2 (see Section 1.2.2), campaign reception is the process by which the target group sees, hears or attends the campaign outputs (leaflets, posters, radio ads, events etc.) and becomes exposed to the campaign messages. This can be a conscious or a subliminal process, i.e. in some cases people will not be aware that they have received and/ or responded to the campaign message.

Where campaign reception remains at a conscious level, this can be measured by looking at campaign recall. By comparing people's changes in attitudes and behaviour with their recall of the campaign, it is possible to *estimate* whether these changes can be attributed to the campaign. However, this type of attribution through campaign recall is not conclusive; it does not take into account any changes caused by subliminal responses to the campaign, or its influence on a respondent's peer group.

### **6.6.4 Effectiveness performance measures**

As indicated by Figure 1.2, campaign effectiveness can be assessed (at least in part) by comparing campaign objectives and the measurable objectives (where used) with outcomes.

In the case of comparing campaign objectives with outcomes, such comparisons can be both qualitative and quantitative. For example, a campaign objective might be: "Reducing the number of school children travelling to school by car over a period of one month." The corresponding impact indicator would measure this more precisely, in terms of the actual number of children changing mode (e.g. from car to bicycle) for their journey to school over a given period (quantitative). Assuming that the monitoring reveals a reduction in car trips, then the objective will have been met. However, we can then go further and quantify the level of reduction. If a more qualitative approach was taken, then an example of an indicator could be that before the campaign, there were hardly any bicycles parked at the school, where as after the campaign, there was no room in the bike sheds.

Some sites may decide to include measurable objectives to quantify some of the objectives of their campaign. An example might be: "Reducing the number of school children travelling to school by car over a period of one month *by 10%*." In these cases, a directly quantitative comparison may be made with the corresponding impact indicators, in order to assess the extent to which the target has been met (or exceeded).

The measures of effectiveness will draw on the evidence of the appropriate impact indicators for your campaign, comparing these (quantitative) outcomes with the objectives set at the outset of the campaign. The purpose of assessing such effectiveness is to identify the probable causes for success. Whilst making such considerations it will, of course, be important to consider effectiveness not in isolation, but in the fuller context of other indicators and contextual information, in particular external factors affecting the campaign implementation.

## 7 INTERPRETING AND PRESENTING YOUR RESULTS

### 7.1 Checklist of criteria for good data analysis

This section is a checklist of the techniques and steps that should be used to ensure that your data is analysed and interpreted correctly. As with Section 6, it can be used either internally within your organisation, or to carry out a 'quality control' on the work of the market research agency you have employed.

#### **Step 1 – Verification (Checking that the data has been correctly entered)**

This is a procedure whereby a sample (typically 5%) of the paper questionnaires entered into a software package are re-entered, to assess the accuracy of the data entry. It is not possible with CATI (Computer Aided Telephone Interviewing) or CAPI (Computer Aided Personal Interviewing) surveys, where data is captured electronically at the time of entry. Not all software packages have this facility, but it is a useful quality assurance check, especially if new procedures or methods are being used. The knowledge that data verification will take place is likely, in itself, to improve the quality of the data entry, since errors from individual data entry staff may be spotted. Acceptable error levels will be determined by the level of statistical precision required, but should certainly not exceed 0.1% of keystrokes (or 'punches').

Verification in this sense is not possible with count data, although values generated by one technique (e.g. a parking count) may be compared with reported behaviour from a questionnaire, for example, or other count data (e.g. local traffic flows). Similarly, automatic traffic counters can be calibrated or validated against video recordings or direct observation.

#### **Step 2 – Cleaning**

This involves carrying out range and logic checks on the survey research data. Range checks confirm that values are within an acceptable range (e.g. number of days travelled in a week to a particular destination cannot be more than seven) and that logically incompatible answers are not given to questions. Care must be taken, however, not to hastily exclude unlikely response combinations. Computer-assisted techniques often alert the interviewer to such discrepancies as they are entered, allowing them to be resolved with the respondent *in situ*. Where the respondent cannot be recontacted, judgements must be made by the researcher, and full cleaning of a medium size record set (several hundred responses) may take several weeks if the data contains relatively complicated trip details.

#### **Step 3 – Data analysis, with statistical tests**

Once your data has been entered, verified (where possible) and cleaned, it is then possible to compare the results from the 'before' questionnaire with the 'after' questionnaire, to see if there have been any changes. Often, this is simply represented as the change in the number (or proportion) of respondents who give a particular response.

For example:

**Table 7.1: Results for question:  
“There are too many cars arriving at our school each morning”**

	Before	After
Strongly agree	27,0%	33,0%
Agree	37,4%	28,1%
Neither agree or disagree	20,8%	17,4%
Disagree	11,3%	8,8%
Strongly disagree	3,6%	12,6%
	100%	100%
Total response (n)	N=530	N=430

However, the results presented in Table 7.1 cannot tell us whether the overall changes in responses are **statistically significant** i.e. whether having analysed the data in detail, the changes are big enough to be able to say that they have not occurred just by chance.

For this type of analysis the tests in Table 7.2 should be used. All can be carried out using SPSS and some by EXCEL (chi square and paired proportion test).

**Table 13: Appropriate statistical tests for different types of sample and data**

Type of change measured by type of sample	measuring a <u>change in proportions</u> e.g. proportion of people aware of a campaign	measuring a <u>change on a scale</u> <sup>(1)</sup> e.g. agreement with a policy, on a scale of 1-5
<b>independent samples</b> (e.g. on-street before and after questionnaire)	chi-squared <i>or</i> paired proportion test	Mann-Whitney U test
<b>matched samples</b> (e.g. before and after panel survey)	McNemar test	Wilcoxon Signed Ranks

By carrying out the appropriate tests, it should be possible to give a ‘p value’ to each of the questions you analyse. In some cases, you may need to look at sub-groups of your target group to find lower p values – i.e. those which say there has been a significant change.

The following table, from the Gävle Hageström campaign report, highlights this process. In some cases, statistically significant changes are not found for the whole target group (all parents). However, when split into two sub-groups (men and women), some changes do become significant.

**Table 7.3: Examples of target sub-group analysis**

Question	Target group		
	Total	Men	Women
<b>Question – concerning the Childs trip to/from school</b>			
The child biked to/from school	Increased	Increased	Increased
The child was driven to/from school	Decreased	Decreased	Decreased
<b>Question – concerning parents own trips to/from work</b>			
Performance: The car- allows me to travel when I want to	Decreased	Decreased	
Performance: The bike – good for my personal health	Increased	Increased	
Performance: The bike - offers good personal security	Increased		Increased
Intention - Next time I go to work, if the weather is fine, I intend to bike instead of driving,	Increased	Increased	
Importance - gets me to work quickly	Decreased		Decreased
Awareness - the car traffics impact on the air quality	Increased	Increased	
<b>Question – answered by men in the target group</b>			
Behaviour – car trips to/from work		Decreased	
Behaviour – biking trips to/from work <sup>11</sup>		<i>Increased (94.5 % level)</i>	
Performance: the bike - is an enjoyable way to travel		Increased	
Performance: the car – an environmental way of travel		Decreased	
Performance: the car - is comfortable		Decreased	
Importance - helps the environment		Increased	
Awareness - traffic congestion ...		Increased	
Awareness – Noise from the traffic		Increased	
Awareness – Car traffics impact on global environment (global warming, “acid”)		Increased	
<b>Question – answered by women in the target group</b>			
Behaviour – trips to/from work as a car passenger			Decreased

Results – Target group, Hagaström School, matched data. All results are at the 95% significance level.

(The questionnaires were answered by one of the parents in the pupil’s family.)

<sup>11</sup> This shows that the second objective – Decrease the parents’ numbers of trips with private car to work – was (almost) achieved.

### **Step 4 – Compare your target group results with your control group**

Where you have used a control group, the data set should be treated separately for the data entry, verification and cleaning; and the results should be analysed separately. If your campaign has been the cause of any positive changes in awareness, attitudes or behaviour, then you should see changes in your target group results, but not in your control group. Identifying those individual results where there have been changes in the control group can help you to pinpoint external factors that might have had an influence.

## **7.2 How to present your results**

The way in which you present your results to different audiences can determine:

- The views of policy makers about your campaign and the value of campaigns in general
- How your campaign is perceived by other professionals
- Whether your campaign is widely publicised by the press
- The public's perception of the campaign and acceptance of the approach used.

### ***7.2.1 Presenting your results to policy makers***

Policy makers are naturally most interested in three main factors:

- Did the campaign meet its objectives?
- Was it efficient? (How much did it cost to meet the campaign objectives?)
- How far did the campaign help meet the strategic policy objectives?

If your campaign has not been as successful as you predicted in meeting its objectives, the following questions may need to be addressed:

- What went wrong?
- What lessons can be learnt for next time?
- How should we present this 'failure' to the public? What are the positive aspects to highlight?

In general, policy makers do not require a lengthy report (or presentation) containing every single result from your campaign. Instead, try to set out the answers to the key questions above clearly and concisely, using figures that are easy to understand and in non-technical language.

### ***7.2.2 Presenting your results to other professionals***

Other professionals are usually keen to learn from other people's experiences. They will not be interested only in the results of your campaign, but also in how you achieved those results. Your presentation (or report) should therefore include details of:

- The situation or problem you were trying to address
- The type of campaign you chose and why
- Campaign design (message, message giver's tone, media etc.)
- Campaign management aspects, such as partnerships and funding.

- The assessment methodology you used
- The most important results, including details of how they were analysed

### **7.2.3 Presenting your results to the press**

When you present your result to the press, you should follow the same guidelines set out in Section 3 for media relations in general, i.e.:

- Think in terms of pictures or photos, not words
- Focus on what you have done for your target group and not your own organisation
- Be honest – tell the media about your not so successful projects (if they ask) as well.
- Try to give your project an identity ('a face').

Now that your campaign is over, it is also worth highlighting the key results for the campaign overall. However, wherever possible, try to find somebody who has been affected by the campaign to tell 'their story' to provide 'human interest'. For example, for a school-based campaign, arrange an interview with a teacher who has been involved or some parents and children who have changed the way they travel to school.

### **7.2.4 Presenting your results to the public**

The key factor in presenting your results to the public is to ensure that you make them relevant to your audience. Remember the core value proposition and relate your reporting of the campaign to those values. For those who have been involved in the campaign, it will be important to demonstrate how their contribution has led to its success. If the campaign has been less successful, you should try to highlight the positive elements and show how you will learn from the negative aspects.

As for policy makers, it is important to present the most important results in a clear and non-technical way. Again, depending on your audience, you may need to spend more time designing more interesting ways to depict the data than traditional graphs and charts.

Finally, consider your delivery: it may, for example, be best to hold an exhibition in the location of your campaign (e.g. school) or produce special 'result' leaflets to be delivered to each of the households in the area concerned, or simply to ensure that an article is included in your organisation's newsletter and website.

#### **TAPESTRY EXAMPLES**

For each of the three Austrian campaigns brochures were prepared, not only to explain the reasons behind the campaigns and the various measures carried out, but also to present some of the campaign findings. The brochures were then widely used to promote the campaign to parents and to give to the local partners who supported and/ or funded the campaign.

The brochures were highly colourful, with most of the pages containing a large number of photos or illustrations. In particular, graphics were used to explain the results of the pupils' questionnaires (see Figure 7.3).

**Figure 7.3: Example of Austrian schools campaign brochure**

### 7.3 Learning the lessons for next time

At the end of your assessment process you are in an ideal position to reflect on those areas that have been successful and perhaps those areas that could be improved next time. Common areas that may not go completely to plan the first time include:

- Not defining the objectives of the assessment process clearly from the start
- Allocating insufficient resources to the assessment process
- Allowing insufficient time to set up the data collection process (e.g. questionnaire design, sampling, traffic counts etc.)
- Not having skilled personnel to carry out the data collection process (interviewers, focus group facilitators etc.)
- Questions which did not give the responses you expected because their meaning was unclear (due to lack of piloting)
- Allowing insufficient time and resources for data cleaning and analysis

Just as it is worth carrying out a review of the campaign management process, it is useful to bring all those concerned with the assessment process together to discuss how things could be improved. If an external market research agency was used, it may not be possible to involve them in this process. However, good market research agencies should always be willing to attend such a review session. If this is not the case, your organisation could still review the

quality of their work and consider the elements to be included in a more detailed briefing to help choose an agency next time.