Making Personal Travel Planning Work: Case Studies
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Cover photo acknowledgements
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1. Worcester – Sustainable Travel Town

1.1 Interviewees:

- Emilie Van De Graaff, Cat Ainsworth (Worcestershire County Council);
- James Ryle (Sustrans);
- Dawid Maciejewski (First Midland).

General background

1.2 In April 2004, Worcester was chosen by the Department for Transport (DfT) as one of three demonstration Sustainable Travel Towns (STT). Worcestershire County Council (WCC) was awarded £3.52 million over five years to undertake the project, branded locally as ‘Choose How You Move’.

1.3 Individualised Travel Marketing (ITM) is a core component of the Choose How You Move programme and is being rolled out to approximately 60% of the Worcester population (23,500 households, which equates to approximately 56,000 people). The total population of Worcester is approximately 93,000 people.

1.4 The first stage of the ITM programme was launched in the Warndon area of the city, located to the north-east of the city centre towards the suburbs, between September and December 2005. The initial target group consisted of 6,300 addresses in the wards of Warndon, Warndon Parish North, Warndon Parish South, Gorse Hill and Rainbow Hill. During this stage, the new Project Express bus services were launched and promoted by the ITM programme.

1.5 The second stage of the ITM programme was split into two phases. The first phase (phase 2.1) took place between April and August 2006 and targeted the areas of Ronkswood and Red Hill in the wards of Battenhall and Nunnery to the east of the city with an initial target population of 4,775 residential addresses. The second phase of the second stage (phase 2.2) took place between September and November 2006 and targeted 3,829 addresses principally in the St Peter’s area of Worcester situated to the south of the city centre. In September 2006 a new bus service for commuters was introduced in the Phase 2.2 target area.

1.6 The third and final phase of ITM will take place in 2007 and target the western wards of Bedwardine, St Johns and St Clements. During this time there will be minor improvements to cycle infrastructure.
**Targets and objectives**

**Objectives**

1.7 The specific local objectives of the ITM programme are as follows:

- to offer personalised information and support on sustainable travel options to 60% of the city's inhabitants over three phases;
- to encourage greater use of sustainable modes of transport without reducing the number of journeys made in each year;
- to improve the perception of public transport through greater use of existing services;
- to use information gained through travel diaries and follow up surveys to influence future transport strategy for the city.

**Targets**

1.8 Targets have only been specific for the overall STT programme. These are as follows:

- 10% reduction in car as driver journeys;
- 10% increase in walking;
- 100% increase in cycling;
- 20% increase in public transport use;
- 8% decrease in car passenger trips.

**Sociological behavioural theories/behavioural underpinning**

1.9 Worcestershire have considered the fundamentals of a number of behavioural change theories in relation to their ITM programme, together with marketing based theories. Staff members within the Choose How You Move team have a strong marketing background.

1.10 The Choose How You Move project employs the TravelSmart (ITM) approach, which applies a segmentation approach to establish whether a household is interested or not, and if they are interested what tools/incentives are required to motivate them to make a change to behaviour. This is in accordance with the standard TravelSmart approach as shown in Figure 1.1.

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1 Otherwise known as ‘IndiMark’.
1.11 The areas chosen for the ITM programmes have largely focused on areas of high car ownership and high car usage, combined with a specific focus on the areas where improvements to the sustainable transport networks are being implemented. Aligning the Choose How You Move programme and visible infrastructure improvements forms an important component of the overall project delivery process.

**Project process**

1.12 **Contact phase:** To launch each phase of the ITM programme and to raise awareness, an announcement letter was sent out to the target population explaining the purpose of the project. Households were contacted shortly after the letter had been sent out, either by phone, or by door-to-door contact where a public telephone listing was not available. For the first two stages of the ITM programme, more people had to be contacted on their doorstep than by phone. Those people that were contacted by phone were engaged in a conversation in order to establish how interested members of the household were in participating.
in the project and their current usage of environmentally-friendly and healthy travel choices. Analysis of this conversation allows Socialdata/Sustrans (the appointed consultancy team) to segment people into four groups, namely:

- interested (I);
- regular user with wish for information (R with);
- regular user with no wish for information (R without);
- not interested (N).

1.13 A Choose How You Move service sheet was sent to the appropriate households, inviting people to request specific tailored travel advice.

1.14 People that did not have a public listed telephone number were contacted on their doorstep. The conversation with the household allowed the canvasser to complete the first part of the service phase, offering households a range of personalised information available on the service sheet. The information requested, along with the conversation, enabled the household to be allocated to one of the four segmentation groups.

1.15 **Service phase:** During this phase, households that were contacted by telephone and segmented into groups ‘I’ and ‘R with’ were sent their service sheets through the post and were invited to request information that they felt would be of use. An offer of a small incentive (a personal FM radio) was included on the service sheet to encourage a prompt response. All households in group R (both with and without a wish for information), and those in group I that regularly walked and cycled, were offered a Choose How You Move branded gift to reward their behaviour. Households contacted on their doorstep received the same offer. All information packs and/or gifts/rewards were delivered by hand by Sustrans delivery staff. Those segmented into the N group were sent a pack containing information on responsible driving and an area walking, cycling and public transport map.

1.16 A list of the marketing materials available can be found in the marketing section of this case study report.

1.17 **Convincing phase:** This phase offers further services, support and motivation to households to convince them to use more environmentally friendly and healthy travel choices more frequently. Further practical support is offered through the Choose How You Move ‘further services’ which offers advice through home visits. Home visits were focused on a transport mode of the household’s choice, either walking, cycling or public transport. Public transport visits were undertaken by First bus drivers, and walking and cycling home visits were undertaken by Sustrans advisers. Despite being recognised as a powerful tool, the resource-intensive nature of these home visits means that they were offered only to selected households (those with a demonstrable need for further support). Furthermore, despite availability of broad time-slots to fit in with households’ needs and preferences, a relatively small proportion took up the offer. This may be because people are not
interested in the advice on offer, or that they are unwilling to accept a home visit.

1.18 The two completed stages of the Worcester ITM project have seen an increasing percentage of people categorised into the I group. Table 1.1, shows the segmentation recorded during the two stages completed so far. It is noticeable that more people expressed an interest in receiving information during the two phases of the second stage, which may be attributable to increased awareness of the STT (Choose How You Move) project or symptomatic of a more widespread awareness of sustainability issues.

1.19 Feedback received from households who were invited to take part in the ITM at all stages of the process has been positive and has reinforced the value of the project to the project partners. Sustrans provide a ‘quote of the day’ to the officers at the county council, to give a taste of the positive responses to the programme. A few letters of complaint have been received, commonly focusing on funding questions or relating to local ‘specific car parking issues’. This could be viewed as evidence of a lack of awareness of the project and the Choose How You Move branding, or may suggest a need for additional promotion of the Council’s complaints and comments procedure.

### Table 1.1: Segmentation of the respondents contacted in each of the Worcester ITM campaigns

<table>
<thead>
<tr>
<th></th>
<th>Stage 1 (base 5,247) (%)</th>
<th>Stage 2.1 (base 3,913) (%)</th>
<th>Stage 2.2 (base 3,133) (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group I</td>
<td>44</td>
<td>51</td>
<td>56</td>
</tr>
<tr>
<td>Group R with</td>
<td>14</td>
<td>13</td>
<td>11</td>
</tr>
<tr>
<td>Group R without</td>
<td>10</td>
<td>12</td>
<td>9</td>
</tr>
<tr>
<td>Group N</td>
<td>32</td>
<td>24</td>
<td>24</td>
</tr>
</tbody>
</table>

1.20 Cat Ainsworth at WCC is responsible for the ITM programme across Worcester. The experience in Worcester suggests that the planning and management of an ITM programme of this size requires a significant amount of officer time, particularly before the first phase if new, branded materials need to be produced. The next phases of an ITM programme are less intensive as many materials have already been produced, however updates and local specific information will be still be required.

1.21 Worcestershire noted that a dedicated officer to lead any ITM project is highly advisable in order to tap into parishes and other local stakeholder groups and to gain support for the project and disseminate to a wider number of influential parties.
Marketing and promotion

1.22 Marketing is one of the core elements of the ITM project, and there is a large amount of material available to participants. Some material was already in the public domain whilst other pieces were developed specifically for the project. Table 1.2 identifies the information materials available and their popularity amongst participants of Phase 2.2 of the ITM programme in 2006.

<table>
<thead>
<tr>
<th></th>
<th>I</th>
<th>R with</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total items</strong></td>
<td>14,470</td>
<td>3,209</td>
<td>17,679</td>
</tr>
<tr>
<td><strong>Items per participating household</strong></td>
<td>8.2</td>
<td>9.4</td>
<td>8.4</td>
</tr>
<tr>
<td><strong>Items per pack</strong></td>
<td>10.5</td>
<td>10.4</td>
<td>10.5</td>
</tr>
<tr>
<td><strong>General Materials: Local Travel Maps</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Worcester South-east and surrounding area on foot, by bike and by bus</td>
<td>1,003</td>
<td>215</td>
<td>1,218</td>
</tr>
<tr>
<td>Worcester: Walking, Cycling and Public Transport Map</td>
<td>1,016</td>
<td>218</td>
<td>1,234</td>
</tr>
<tr>
<td><strong>Public Transport</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bus Stop Timetables</td>
<td>799</td>
<td>219</td>
<td>1,018</td>
</tr>
<tr>
<td>First Worcester City Bus Service Map</td>
<td>868</td>
<td>239</td>
<td>1,107</td>
</tr>
<tr>
<td>Timetables for individual bus services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Worcester Express W2 and W3 Park and Ride: City Centre via Royal Hospital – County Hall</td>
<td>386</td>
<td>124</td>
<td>510</td>
</tr>
<tr>
<td>27: Battenhall Road – City Centre</td>
<td>333</td>
<td>114</td>
<td>447</td>
</tr>
<tr>
<td>382: Pershore – Eckington – Dettford – St Peter’s – City Centre</td>
<td>498</td>
<td>149</td>
<td>647</td>
</tr>
<tr>
<td>Concessionary Fares Scheme</td>
<td>151</td>
<td>45</td>
<td>196</td>
</tr>
<tr>
<td>Regional Train Services: Centro and Central Trains Worcester to Hereford and Birmingham</td>
<td>524</td>
<td>128</td>
<td>652</td>
</tr>
<tr>
<td>Train Services to London: First Great Western Trains Worcester to London</td>
<td>417</td>
<td>96</td>
<td>513</td>
</tr>
<tr>
<td>Personal Journey Plan</td>
<td>51</td>
<td>9</td>
<td>60</td>
</tr>
</tbody>
</table>

2 Based on all households in Groups ‘I’ and ‘R with’ included in the motivation and information phase.

3 Based on all households in Groups ‘I’ and ‘R with’ receiving information.
<table>
<thead>
<tr>
<th>Table 1.2: Information materials available in Worcester continued</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Walking</td>
</tr>
<tr>
<td>Walking South East Worcester</td>
</tr>
<tr>
<td>Put Your Heart into Walking</td>
</tr>
<tr>
<td>Get kids on the go</td>
</tr>
<tr>
<td>The Walking Bus</td>
</tr>
<tr>
<td>Walk More – Feel the Difference</td>
</tr>
<tr>
<td>Walk In to Work Out</td>
</tr>
<tr>
<td>Cycling</td>
</tr>
<tr>
<td>Pershore to Worcester Cycle Route</td>
</tr>
<tr>
<td>Adult Cycle Training flyer</td>
</tr>
<tr>
<td>Cycle Information Leaflets:</td>
</tr>
<tr>
<td>Cycling: the right bike for you</td>
</tr>
<tr>
<td>Cycling: basic bike maintenance</td>
</tr>
<tr>
<td>Cycling: in different conditions</td>
</tr>
<tr>
<td>Cycling: security matters</td>
</tr>
<tr>
<td>Cycling: sharing your route</td>
</tr>
<tr>
<td>Cycling: with children</td>
</tr>
<tr>
<td>Cycling: finding your way</td>
</tr>
<tr>
<td>Cycling: clothes and accessories</td>
</tr>
<tr>
<td>Cycle Scheme leaflet</td>
</tr>
<tr>
<td>LED cycle lights</td>
</tr>
<tr>
<td>Pledge Card</td>
</tr>
<tr>
<td>Choose how you move Pledge Card</td>
</tr>
<tr>
<td>Other Information</td>
</tr>
<tr>
<td>Community Transport in Worcester</td>
</tr>
<tr>
<td>Car Sharing</td>
</tr>
<tr>
<td>Safe Routes to Schools</td>
</tr>
<tr>
<td>My other car is a bicycle sticker</td>
</tr>
<tr>
<td>Incentives</td>
</tr>
<tr>
<td>Personal FM radio</td>
</tr>
</tbody>
</table>

Source: Socialdata and Sustrans, Jan 2007, Table 2.5, information materials and incentives delivered, in ‘Worcester Choose How You Move ITM Programme, Stage 2.2 Field Report, St Peters, September – November 2006’
1.23 The timetabling of the production of materials is vital to the project. Officers at WCC started the preparation of the information materials 5–6 months before the start of the project, indicating a long lead in time in order to ‘get it right’ at the project launch.

1.24 The most popular information materials amongst participants so far have been:

- the local area-specific maps;
- Worcester walking, cycling and public transport maps;
- bus stop timetables;
- pocket bus timetables;
- First Worcester city bus service map;
- local walking maps;

1.25 The bus-stop timetables were a very popular choice when people were choosing their information. Subsequent surveys showed they were rated positively by a significant proportion of people receiving them (see Table 1.10). However, the county council felt there was a significant resource issue with the production of the stop-specific timetables in terms of human resource and cost (40 pence per sheet). As services and/or timetables changed during the course of the project, the stop-specific timetables would be immediately invalidated, presenting a risk to project credibility. The reprinting of new up-to-date stop-specific timetables was problematic and costly in terms of money and human resource. The county council felt the bus-stop timetables could also cause a few problems, as participants were able to plan their journey to their destination, but their return journey wasn’t as easy to plan and required another stop-specific timetable. As a result of these concerns, the county council decided that the ITM programme would not offer bus-stop timetables after ITM stages 1 and 2.1.

1.26 Officers at the county council have a general feeling that participants prefer local area-specific information to city-wide information, as people tend to have a mental map of their local area, and local information can help to develop that mental map. Participants also like to see local photos on their local area information materials.

1.27 The local area maps are also popular amongst participants. They add detail to the city-wide map, for example listing the services and shops at a local centre rather than just identifying a local centre on the map.

1.28 Wider promotion of the Choose How You Move project and Project Express has been ongoing, including advertisements on bus backs and billboards.

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4 The evaluation of Stage 1 showed that only pocket bus timetables and ‘all information’ were rated as more useful.
In addition to the marketing materials, gifts and incentives were provided to participants at different stages of the ITM process to encourage modal change and participation. Table 1.3 lists the incentives and rewards utilised.

<table>
<thead>
<tr>
<th>Incentive/reward</th>
<th>To whom offered</th>
<th>When offered</th>
<th>Why</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal FM radio</td>
<td>Groups I and R with information request form</td>
<td>At stage of completing the service sheet (information request form)</td>
<td>To maximise response</td>
</tr>
<tr>
<td>Choose-branded Parker roller ball pen or travel alarm clock</td>
<td>All of Groups I, R with and R without who regularly walked or cycled</td>
<td>Offer was made on a separate mail back order form (after the conversation and segmentation had taken place)</td>
<td>To confirm and reward their behaviour</td>
</tr>
<tr>
<td>One-month First bus test ticket</td>
<td>Households requesting a public transport oriented home visit</td>
<td>When home visit was conducted</td>
<td>To encourage participants to try the bus services</td>
</tr>
<tr>
<td>Bike health check and free cycle trip computer</td>
<td>Households requesting a cycling oriented home visit</td>
<td>When home visit was conducted</td>
<td>To encourage participants to cycle more</td>
</tr>
<tr>
<td>Free step-o-meter</td>
<td>Households requesting a walking oriented home visit</td>
<td>When home visit was conducted</td>
<td>To encourage participants to walk more</td>
</tr>
</tbody>
</table>

WCC enjoy a relatively good relationship with the local media. The papers almost always pick up on press releases and give them a positive spin – however, press releases about bus services tend to create the most negative responses. When Project Express and ITM were launched at the same time, the press focused on the new bus services rather than the Choose How You Move project, which was a little disappointing.

In the future, Worcestershire would like to explore other media through which marketing could be disseminated to households, e.g. existing travel websites, for example Traveline, online journey planning, electronic timetables.
Funding

1.32 The funds from the Department for Transport are central to the ITM and the STT project as a whole (see section on costs below). WCC have a number of ideas for further longer-term funding (independent of DfT grant support). These are as follows:

- Section 106 funds (however, it is uncertain how much of these funds can be used for ITM/Personal Travel Planning).
- Sponsorship of leaflet and information materials. The total cost of producing the materials and the cost of contacting people needs to be considered. On average the cost of the printed materials in the home packs cost £5, while the cost of phoning people and talking to them costs £19 per person.
- Local Transport Plan (LTP) delivery grant (subject to the approval of the LTP auditors, and the long-term sustainability of the Personal Travel Planning (PTP) approach).
- Bus operator contributions, assuming they were seeing increased revenue that could be attributed to the effects of past PTP projects. The bus companies already contribute their time and timetables free of charge.

1.33 WCC are aware of the possibility of grant over-reliance and are eager to avoid this. Further thoughts rest with the nature of PTP as to whether it is a separate project or an element of an integrated package of measures. The latter way of viewing PTP would enable money to be ring-fenced from large-budget projects, adding value to the infrastructure delivery programme.

1.34 At a regional level, the Regional Development Agencies may be a possible source of funding (especially for rural areas and areas of low accessibility) through Accessibility Planning budgets. However, it is recognised that at present the case for PTP in rural areas is unproven and the issues around transport are completely different (i.e. lack of bus services and poor walking and cycling infrastructure).

Costs

1.35 Total cost of the ITM programme over three years (contacting approximately 23,000 households), including Sustrans/Socialdata costs, WCC staff time and costs for materials is approximately £650,000. This equates to £28 per household targeted (including the ‘not interested’ group).

1.36 There is an additional cost of the Sustainable Town Project behaviour research, which comes to a total of approximately £225,000 (detailed baseline and end-of-project research with two interim research reports after years 1 and 2 of the ITM programme).
Integration with other transport related initiatives/projects

1.37 WCC have worked closely with First Bus Company (which operates all commercial services in the city), which have been a lead partner in the project. The other bus operators were brought on board to the scheme as they were working under cost based contracts to the county council.

1.38 The first stage of the ITM programme in and around the Warndon area promoted the new Project Express bus routes introduced in September 2005, the same time as the launch of the ITM. These new bus routes were introduced to help realise the full potential of the new Worcester park-and-ride scheme. Route W1 runs direct between the park-and-ride site and the town centre via the A38, route W2 runs from the park-and-ride site via Shire Business Park, Warndon Villages, the Worcestershire Royal Hospital, Shrub Hill and the town centre, and route W3 operates the same route as W2 but in the opposite direction.

1.39 In theory, ‘dovetailing’ the launch of the ITM and Project Express was a good idea. However, it presented practical challenges and caused some problems, mainly due to the fact that both projects were resource-heavy and some of the staff were newly recruited to the county council and thus relatively inexperienced. New promotional and information materials for both projects needed to be ready at the right time, and the new bus services needed time to settle and ‘bed in’.

1.40 Fundamentally, the incoming new services signified a major period of change, and there was some confusion about the Project Express services, as they had replaced other services. Good marketing mitigated the impact, and the initial passenger numbers were good.

1.41 The ITM promotional material and the Project Express promotional material carried different branding, with the ITM material carrying the Choose How You Move branding, distinct from the Project Express branding. This different branding of the two services created some early confusion regarding the overall message being communicated to the public.

1.42 First Group also assisted with the project by providing staff to complete home visits where the residents were interested in using public transport. During the first stage, six bus drivers were trained up to conduct the public transport related home visits. Fifty-three visits were conducted in total. However, this arrangement did not work as smoothly as hoped, because there were not sufficient numbers of drivers to replace the trained drivers. In the second stage of ITM, ex-drivers were used, which worked better. Eighteen public transport-related home visits were conducted in the first phase, and five public transport-related visits were conducted in the second phase. Despite some reservations about cost-effectiveness, the bus operator continues to provide staff to undertake home visits during the ITM programme.

1.43 First Group also runs bus surgeries in the city centre and attracts many passers-by; 150 people attended the last surgery. Sustrans have agreed to publicise the details of the bus surgeries in future campaigns.
Evaluation
1.44 An interim evaluation for stage 1 (ITM project in the areas of Warndon, Warndon Parish North, Warndon Parish South Gorse Hill and Rainbow Hill) was completed in May 2006 and the key points from this document are detailed below.

1.45 The evaluation report reviews the findings of a telephone survey conducted in Worcester during March–April 2006 and compares the findings with data from the baseline research programme conducted during September–November 2004. As stated earlier, the ITM campaign was undertaken between September and December 2005.

1.46 The baseline data was collected using a postal survey enquiring about household and personal travel behaviour that was sent out, at random, to 4,125 people (net) all over Worcester. In addition, a series of in-depth interviews were held with 400 people to discover their attitudes to transport issues and help understand their daily travel choices.

1.47 The telephone survey itself was conducted with a total net sample of 1,408 people, of which roughly two-thirds were drawn from the target population for Stage 1 of the ITM programme and one-third from the rest of the city as control. An announcement letter had been circulated in advance to all persons due to receive a call. The interim survey probed people on the average travel behaviour of all people in the household; questions that were also used were also used in the baseline survey.

1.48 The sample of people that were to be contacted from the ITM target group (two-thirds) was drawn from the 6,300 addresses in the initial target population. The sample was constructed to include proportional shares of people who were segmented during the ITM contact phase as interested, not interested and regular user, and those who did not respond. The control sample group was drawn at random from households in other parts of the city.

1.49 WCC also assessed corroborative data including bus patronage and cycle counters.

Impact and effectiveness
1.50 The reported results present the findings on average travel behaviour from the baseline and interim surveys for both target and control groups. For each main travel mode, it demonstrates the deduced changes in trips per person per year among the target group, with changes in the control group taken into account. The results also present feedback from the target group about the information they received during the ITM campaign.

1.51 Tables 1.4 to 1.7 show the shift in the frequency of use of the different modes (walk, cycle, public transport and car).
### Table 1.4: Use of walking

<table>
<thead>
<tr>
<th></th>
<th>With ITM (Warndon sample)</th>
<th>Without ITM (Worcester sample)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Before (%)</td>
<td>After (%)</td>
</tr>
<tr>
<td>Daily, several times per week</td>
<td>33</td>
<td>43</td>
</tr>
<tr>
<td>Several times per month</td>
<td>31</td>
<td>28</td>
</tr>
<tr>
<td>(Almost) never</td>
<td>36</td>
<td>29</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

### Table 1.5: Use of cycling

<table>
<thead>
<tr>
<th></th>
<th>With ITM (Warndon sample)</th>
<th>Without ITM (Worcester sample)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Before (%)</td>
<td>After (%)</td>
</tr>
<tr>
<td>Daily, several times per week</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Several times per month</td>
<td>12</td>
<td>9</td>
</tr>
<tr>
<td>(Almost) never</td>
<td>84</td>
<td>83</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

### Table 1.6: Use of public transport

<table>
<thead>
<tr>
<th></th>
<th>With ITM (Warndon sample)</th>
<th>Without ITM (Worcester sample)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Before (%)</td>
<td>After (%)</td>
</tr>
<tr>
<td>Daily, several times per week</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Several times per month</td>
<td>18</td>
<td>25</td>
</tr>
<tr>
<td>(Almost) never</td>
<td>72</td>
<td>65</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>
The data sets above are linked to people’s changes in mode choice, and Table 1.8 shows these changes in terms of trips per person per year. The headline report is that, on average among the ITM target population (taking into account changes across the city), car driver trips per person per year were reduced by 12%.

Table 1.7: Use of car (as driver)

<table>
<thead>
<tr>
<th>Frequency</th>
<th>With ITM (Warndon sample)</th>
<th>Without ITM (Worcester sample)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Before (%)</td>
<td>After (%)</td>
</tr>
<tr>
<td>Daily, several times per week</td>
<td>52</td>
<td>44</td>
</tr>
<tr>
<td>Several times per month</td>
<td>7</td>
<td>12</td>
</tr>
<tr>
<td>(Almost) never</td>
<td>41</td>
<td>44</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

The telephone survey also asked respondents how useful they had found the information during the ITM campaign. The figures in Table 1.9 suggest that approximately three-quarters of respondents found the information materials helpful and useful.

Table 1.8: Changes in mode choice (ITM target group including control group effect)

<table>
<thead>
<tr>
<th>Mode</th>
<th>Without ITM (trips per person per year)</th>
<th>With ITM (trips per person per year)</th>
<th>Relative change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>189</td>
<td>222</td>
<td>+17%</td>
</tr>
<tr>
<td>Cycling</td>
<td>22</td>
<td>30</td>
<td>+36%</td>
</tr>
<tr>
<td>Car as driver</td>
<td>502</td>
<td>442</td>
<td>-12%</td>
</tr>
<tr>
<td>Public transport</td>
<td>73</td>
<td>89</td>
<td>+22%</td>
</tr>
</tbody>
</table>

1.53 Results for each of the segmentation groups are not available and were not undertaken because of cost constraints.

1.54 The telephone survey also asked respondents how useful they had found the information during the ITM campaign. The figures in Table 1.9 suggest that approximately three-quarters of respondents found the information materials helpful and useful.
Table 1.9: General perception of Worcester ITM information materials

<table>
<thead>
<tr>
<th>Helpful and useful?</th>
<th>Serviced households %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>74</td>
</tr>
<tr>
<td>No</td>
<td>26</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
</tr>
</tbody>
</table>

Table 1.10: Usefulness of Worcester ITM information materials by type

<table>
<thead>
<tr>
<th>Most useful...</th>
<th>Serviced households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pocket bus timetables</td>
<td>30</td>
</tr>
<tr>
<td>All information</td>
<td>26</td>
</tr>
<tr>
<td>Bus-stop timetables</td>
<td>18</td>
</tr>
<tr>
<td>Rail timetables</td>
<td>15</td>
</tr>
<tr>
<td>Cycling routes</td>
<td>16</td>
</tr>
<tr>
<td>Walking information</td>
<td>10</td>
</tr>
<tr>
<td>Other cycling information</td>
<td>10</td>
</tr>
<tr>
<td>Other public transport information</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>17</td>
</tr>
<tr>
<td>Total (multiple responses)</td>
<td>149</td>
</tr>
</tbody>
</table>

1.55 Table 1.10 presents the perception of the ITM information materials by type.

1.56 Although Worcester focus on the hard numbers, they do realise the value in qualitative results too. The ITM project, together with the wider STT work, has improved perceptions of public transport, the county council and sustainable transport. However, these are difficult to measure. Much positive qualitative data has been gathered, ranging from ‘quote of the day’ to letters from participants expressing appreciation of the project.

1.57 This shift in public perception, however, may be measured by Best Value Performance Indicators (BVPI) relating to bus services and information and customer satisfaction. However, as these figures are county-wide, they are unlikely to be robust enough to disaggregate to local level.

Shortcomings

1.58 The project is already perceived as successful by officers, members and local partners (reflecting that, at the time of interview, the project still has one year to run). The large majority of participants were happy with the information packs that they received, and the project has been delivered largely on time and budget. The streamlined evaluation appears to provide a good compromise between statistical rigour and acceptable costs.
1.59 There are only a limited number of areas where shortcomings have been identified and these are as follows:

- Arranging home visits proved to be troublesome – arranging a time to fit in with the households that was an efficient use of the travel advisors’ time and energy.

- The launch of ITM and Project Express at the same time placed a huge strain on resources, and, although staff coped well, this may not have been an ideal situation for the first roll-out of the ITM programme.

- The production of, and updates to, some materials were very time-consuming and resulted in additional costs being incurred.

- The failure to secure the funding to examine the health impact of the interventions has meant it has been difficult to maintain the engagement of the health partner to the project.

Other general issues

1.60 If WCC are to roll out PTP to the county level, then they will need to significantly reduce costs per participant (somewhere nearer to £1.50, rather than the current figure of £28). They have yet to determine how (or if) this can be achieved, but may consider a more community-focused approach, building upon the wider travel plan activity and including the delivery of local information on the back of sustainable transport infrastructure projects (i.e. targeting communities associated with new bus routes/services). Sustrans/Socialdata have outlined that they are continually looking for ways to reduce costs, but the fact remains that the personal dialogue, which is so critical to the success of the TravelSmart ITM approach, takes time and resources. Pilots undertaken by Socialdata have shown that streamlining the ITM process results in lower cost-effectiveness. WCC are also considering the role that travel centres/cafés might be able to play in taking PTP out to the rural communities, and the IT infrastructure necessary to make this approach viable.

1.61 WCC are planning for a five-year programme in Worcester of infrastructure improvements to encourage sustainable travel – for example, to reallocate road space in the city centre to give improved bus priorities.
2. Peterborough – Sustainable Travel Town

2.1 Interviewees:

- Amy Wardell, Beth Hiblin (Peterborough City Council);
- Neil Smith (Sustrans).

General background

2.2 In April 2004, Peterborough was chosen by the Department for Transport (DfT) as one of three demonstration Sustainable Travel Towns (STT). Peterborough City Council (PCC) was awarded £3.24 million over five years to undertake the project. The project is branded locally as ‘Travelchoice’ and seeks to implement a comprehensive package of Smarter Choices measures to help tackle traffic congestion by encouraging modal shift to walking, cycling, public transport and car sharing.

2.3 Individualised Travel Marketing (ITM) is a core component of the Travelchoice project and has been branded as ‘My Travelchoice’. It is being rolled out to 50% of the Peterborough population (approximately 30,000 households and 70,000 residents) in five stages.

2.4 The first three stages of the ITM programme were launched in the north of the city because of major works being undertaken on the town rail bridge. The city was separated into five key areas split between the north and south by the River Nene and by the core bus routes that serve the various areas of Peterborough.

2.5 The first stage was launched in the areas of Gunthorpe, Paston, Dogsthorpe, Welland, Newark and Eastfield to the north-east of the city between September and December 2005. The initial target population consisted of 6,500 households.

2.6 The second stage of the ITM programme took place along the Werrington corridor to the north of the city between April and July 2006, with an initial target population of 6,103 residential households.

2.7 The third stage of the ITM programme took place between September and December 2006 in the Bretton area of Peterborough to the north-west of the city. The target population consisted of 5,653 households.

2.8 During spring 2007, stage four is targeting areas of south Peterborough, starting in the Ortons and Hampton (south-west). Residents in Fletton and Stanground, to the south-east of Peterborough, will take part in the final stage of the ITM programme between September and December 2007. A final report on ITM fieldwork is due for completion at the end of February 2008.
Targets and objectives

Objectives

2.9 The specific local objectives of the Travelchoice project as a whole are as follows (these were originally stated in the bid document submitted to the DfT for funding):

• better accessibility for all sectors of the community to the transport network (with particular reference to those living in rural areas and those with mobility difficulties);

• support local economic performance by the provision of an integrated transport network;

• make the best use of existing transport infrastructure;

• reduce the environmental impacts of transport;

• improve community health by increasing walking and cycling and reducing transport related pollution;

• greater integration between different means of travel and with other policy areas;

• reduce the number of personal injury accidents amongst all travellers and reduce travel related crime;

• increase choice and improve quality.

Targets

2.10 The second Local Transport Plan (LTP) highlighted several key targets that PCC would like to meet. These are:

• 442 car trips per person per year in 2010;

• 34.1% of population travelling by sustainable travel modes;

• 69% of the population informed about travel choice by 2008/09;

• 30,000 households to receive personalised journey planning service by 2008/09;

• 26 organisations with more than 50 employees receiving a Travel Plan Award by 2010/11.
Corporate priorities

2.11 The role of the objectives and targets are to meet the corporate priorities that PCC has. These priorities are:

- plan and deliver a safe, attractive and environmentally-friendly city;
- achieve the best possible health and wellbeing;
- make Peterborough a better place in which to work and live;
- provide high quality opportunities for learning and ensuring children are healthy and safe.

Delivery team

2.12 The STT project comprises a package of 18 separate schemes (of which the ITM forms a major component). The STT project provided the catalyst for bringing together a team of officers to cover public transport, cycling, accessibility (walking), business travel planning and information services. The ITM component is led by Amy Wardell, who is the public transport development officer for the team.

2.13 The local authority team is supported by Sustrans and Socialdata staff, including: those based in the central TravelSmart\(^5\) team at Sustrans HQ in Bristol; a local Sustrans project officer (working part-time on ITM and part-time in PCC’s Travelchoice team); a local team of fieldwork staff (during fieldwork stages of the ITM); Socialdata UK (management and call centre operations), backed up by personnel in Socialdata’s HQ in Munich.

2.14 The ITM is also supported by a number of other partners, including the main local bus operator, Stagecoach, who supply information materials and home visit advice sessions.

Sociological behavioural theories/behavioural underpinning

2.15 The IndiMark\(^6\) approach has been employed by the My Travelchoice project. This approach ascertains whether a household is interested or not in participating in the scheme, and if they are interested what tools/incentives are required to convince them to make a change in behaviour. This is in accordance with the standard approach adopted by IndiMark, as shown in Figure 2.1.

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5 Sustrans is the trade name registered to Sustrans for its ITM projects in the UK (unless local project branding is used instead).
6 IndiMark is the trade mark registered to Sustrans for its ITM projects in the UK (unless local project branding is used instead).
2.16 It was decided that every other household in Peterborough would be contacted through the ITM process in all areas of the city. It was hoped that, by targeting half the population, discussion of the project and word-of-mouth marketing will occur to persuade the remaining half of the population to become involved. The city was split into five separate target areas (stages) for ITM, based on the core radial Stagecoach Citi bus routes travelling out of the city.

2.17 Figure 2.2 shows the target area for each stage of the ITM programme (source: Sustrans).
Project process

2.18 **Contact phase:** To launch each stage of the ITM programme and to raise awareness, a letter was sent out to the target population announcing the introduction of the project and explaining its purpose. Households were contacted shortly after the letter had been sent out either by phone, or by door-to-door contact where a public telephone listing was not available.
2.19 Those people contacted by phone were engaged in a conversation in order to establish their interest in participating in the project and their current usage of environmentally friendly and healthy travel choices. Analysis of this conversation allows Sustrans/Socialdata to segment people into four groups, these are:

- interested (I);
- regular user with wish for information (R with);
- regular user with no wish for information (R without);
- not interested (N).

2.20 A My Travelchoice service sheet was sent to the appropriate households, inviting people to request specific tailored travel advice.

2.21 Those people who did not have a public listed telephone number were contacted on their doorstep. The conversation allowed the travel advisor to complete the first part of the service phase, offering households a range of personalised information available on the service sheet. The information gathered through discussions with the household enabled the travel advisors to place the household in one of the four segmentation groups listed above.

2.22 **Service phase:** During this phase, households that were contacted by telephone and segmented into groups ‘I’ and ‘R with’ were sent their service sheets through the post and were invited to request information that they felt would be of use. To encourage a prompt response, a small incentive was offered on the service sheet. All households in group R (with or without information needs) and those in group I that regularly walked or cycled were offered a My Travelchoice branded gift to reward their behaviour. Households that had been contacted on their doorstep, and so had already completed their service sheet, were segmented into groups I and R with. Sustrans’ local fieldwork staff delivered nearly all information packs and/or gifts/rewards by foot and by bike. Those contacted that were not interested were segmented into the N group and, where appropriate, sent information on responsible driving, car sharing, as well as a specially designed local area guide showing bus, walking and cycling routes.

2.23 **Convincing phase:** This phase offers further services, support and motivation to households to convince them to use more environmentally friendly and healthy travel choices more frequently. Further practical support was offered through home visits focused on a transport mode of the household’s choice, either walking, cycling or public transport. Public transport visits were undertaken by a Stagecoach customer service agent and walking and cycling home visits were undertaken by Sustrans advisers.

2.24 The three completed stages of the Peterborough ITM project have seen a slight reduction in the percentage of people categorised into the ‘I’ group. Table 2.1 shows the segmentation recorded during the three stages completed so far. It is noticeable that an increasing proportion of regular sustainable transport users wanted more information throughout
the course of the three stages, while there was a reduction in households who did not want to participate in the scheme altogether from 29% in stage 1 to 25% in stage 3.

Table 2.1: Segmentation of households contacted in stages 1–3 of the Peterborough ITM

<table>
<thead>
<tr>
<th>Group</th>
<th>Stage 1 (base 5,336) (%)</th>
<th>Stage 2 (base 4,981) (%)</th>
<th>Stage 3 (base 4,573) (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group I</td>
<td>50</td>
<td>45</td>
<td>49</td>
</tr>
<tr>
<td>Group R with</td>
<td>11</td>
<td>13</td>
<td>18</td>
</tr>
<tr>
<td>Group R without</td>
<td>10</td>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>Group N</td>
<td>29</td>
<td>32</td>
<td>25</td>
</tr>
</tbody>
</table>

2.25 Feedback received at all stages of the process has been positive and has reinforced the value of the project to the project partners. During fieldwork, Sustrans/Socialdata provided a ‘quote of the day’ to the officers at the PCC, setting out positive responses to the programme.

Staff requirements

2.26 Amy Wardell at PCC is responsible for the ITM programme across Peterborough. Experience suggests that the planning and management of an ITM programme of this size requires a significant amount of officer time, particularly before and during the first stage, where for example new materials and associated branding need to be developed, requiring expertise from various members of the Travelchoice team and other council departments.

2.27 For the initial start-up of the project, there were two officers involved full-time. The following stages of the ITM programme were less intensive, as many materials had already been produced. However, updates and local specific information was required for each individual stage. The project also highlighted areas in which there was a lack of information, and a number of information materials were developed specifically for the project, e.g. bus stop timetables. Travelchoice also relied on a lot of partners providing materials free of charge, such as operator bus and rail timetables and leaflets from organisations such as Natural England and the Ramblers Association.

Marketing and promotion

2.28 Marketing is one of the core elements of the ITM project, and there is a large amount of material available to participants. Some materials were already in the public domain, whilst other pieces were developed specifically for the project. Table 2.2 demonstrates the information materials available in stage 3 and their popularity amongst participants of the ITM programme.
### Table 2.2: Popularity of marketing materials in Peterborough

<table>
<thead>
<tr>
<th>Material Type</th>
<th>I</th>
<th>R with</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Materials: Local Travel Maps</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bretton and surrounding area on foot, by bike and by bus</td>
<td>1,034</td>
<td>404</td>
<td>1,438</td>
</tr>
<tr>
<td><strong>Public Transport</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Getting about Peterborough – the guide</td>
<td>1,010</td>
<td>459</td>
<td>1,469</td>
</tr>
<tr>
<td>Bus Stop Timetables</td>
<td>1,052</td>
<td>451</td>
<td>1,503</td>
</tr>
<tr>
<td>Pocket Bus Timetables Peterborough City Services:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Citi 2/3: Bretton – Westwood – Netherton</td>
<td>940</td>
<td>439</td>
<td>1,379</td>
</tr>
<tr>
<td>Local Link 401/2: Thornhaugh – Stamford – Barnack – Bainton – Ufford – Marholm – City Centre – Bretton Centre – Castor – Ailsworth</td>
<td>441</td>
<td>246</td>
<td>687</td>
</tr>
<tr>
<td>Local Link 404: Stamford – Duddington – Thornhaugh – Castor – Bretton – Peterborough</td>
<td>451</td>
<td>243</td>
<td>694</td>
</tr>
<tr>
<td>Local Link 408: Queensgate – Millfield – New England – Walton – North Bretton – Bretton Centre</td>
<td>469</td>
<td>236</td>
<td>705</td>
</tr>
<tr>
<td><strong>Regional Bus Timetables:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peterborough to Oundle</td>
<td>257</td>
<td>136</td>
<td>393</td>
</tr>
<tr>
<td>Peterborough to Huntingdon</td>
<td>253</td>
<td>158</td>
<td>411</td>
</tr>
<tr>
<td>Peterborough to Cambridge via Chatteris</td>
<td>323</td>
<td>178</td>
<td>501</td>
</tr>
<tr>
<td>National Express Inter-city Timetable: London, Peterborough, Grimsby</td>
<td>403</td>
<td>170</td>
<td>573</td>
</tr>
<tr>
<td>TransLinc London Express Timetable: Boston, Peterborough, London</td>
<td>358</td>
<td>148</td>
<td>506</td>
</tr>
<tr>
<td>Travelchoice Text &amp; Go</td>
<td>218</td>
<td>126</td>
<td>344</td>
</tr>
<tr>
<td>Concessionary Fares Scheme in Cambridgeshire</td>
<td>378</td>
<td>120</td>
<td>498</td>
</tr>
</tbody>
</table>

---

6 Based on all households in Groups ‘I’ and ‘R with’ included in the motivation and information phase.

7 Based on all households in Groups ‘I’ and ‘R with’ receiving information.
<table>
<thead>
<tr>
<th></th>
<th>I</th>
<th>R with</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rail Timetables:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services to Stansted, Norwich and Cambridge</td>
<td>672</td>
<td>287</td>
<td>959</td>
</tr>
<tr>
<td>Services to London and the north</td>
<td>744</td>
<td>318</td>
<td>1,062</td>
</tr>
<tr>
<td><strong>Cycling</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peterborough Cycle Map</td>
<td>1,018</td>
<td>392</td>
<td>1,410</td>
</tr>
<tr>
<td>Cycle Bretton</td>
<td>719</td>
<td>270</td>
<td>989</td>
</tr>
<tr>
<td>Cycling Werrington</td>
<td>366</td>
<td>119</td>
<td>485</td>
</tr>
<tr>
<td>Cycle the Fens</td>
<td>413</td>
<td>115</td>
<td>528</td>
</tr>
<tr>
<td>Learn to Cycle</td>
<td>139</td>
<td>34</td>
<td>173</td>
</tr>
<tr>
<td>Cycle by Train</td>
<td>196</td>
<td>48</td>
<td>244</td>
</tr>
<tr>
<td>Cycle Information Leaflets:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cycling: the right bike for you</td>
<td>183</td>
<td>63</td>
<td>246</td>
</tr>
<tr>
<td>Cycling: basic bike maintenance</td>
<td>241</td>
<td>74</td>
<td>315</td>
</tr>
<tr>
<td>Cycling: in different conditions</td>
<td>170</td>
<td>54</td>
<td>224</td>
</tr>
<tr>
<td>Cycling: security matters</td>
<td>222</td>
<td>79</td>
<td>301</td>
</tr>
<tr>
<td>Cycling: sharing your route</td>
<td>159</td>
<td>47</td>
<td>206</td>
</tr>
<tr>
<td>Cycling: with children</td>
<td>198</td>
<td>54</td>
<td>252</td>
</tr>
<tr>
<td>Cycling: finding your way</td>
<td>176</td>
<td>54</td>
<td>230</td>
</tr>
<tr>
<td>Cycling: clothes and accessories</td>
<td>209</td>
<td>75</td>
<td>284</td>
</tr>
<tr>
<td><strong>Walking</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Peterborough City Trail</td>
<td>916</td>
<td>353</td>
<td>1,269</td>
</tr>
<tr>
<td>Local walking groups and scheduled walks</td>
<td>527</td>
<td>170</td>
<td>697</td>
</tr>
<tr>
<td>Barnack Hills and Holes National Nature Reserve</td>
<td>701</td>
<td>249</td>
<td>950</td>
</tr>
<tr>
<td>Walk More – Feel the Difference</td>
<td>355</td>
<td>126</td>
<td>481</td>
</tr>
<tr>
<td>Walk In to Work Out</td>
<td>206</td>
<td>60</td>
<td>266</td>
</tr>
<tr>
<td><strong>Pledge Card</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good Going – Travelchoice in Peterborough</td>
<td>608</td>
<td>263</td>
<td>871</td>
</tr>
<tr>
<td>Pledge Card</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Other information</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transport in Peterborough – Easy Read Guide</td>
<td>84</td>
<td>26</td>
<td>110</td>
</tr>
<tr>
<td>Peterborough Community Link</td>
<td>241</td>
<td>110</td>
<td>351</td>
</tr>
<tr>
<td>Transport To Healthcare</td>
<td>263</td>
<td>108</td>
<td>371</td>
</tr>
<tr>
<td>Queensgate Shopmobility Guide</td>
<td>161</td>
<td>54</td>
<td>215</td>
</tr>
<tr>
<td>Peterborough Care Share Scheme</td>
<td>151</td>
<td>68</td>
<td>219</td>
</tr>
<tr>
<td>Peterborough Walk, Cycle, Taxi Buddy Scheme</td>
<td>157</td>
<td>86</td>
<td>243</td>
</tr>
<tr>
<td>Safe Routes to School</td>
<td>137</td>
<td>49</td>
<td>186</td>
</tr>
<tr>
<td>Walking to School, good for you – good for everyone</td>
<td>129</td>
<td>39</td>
<td>168</td>
</tr>
<tr>
<td>A Parent’s Guide to Safer Cycling</td>
<td>180</td>
<td>58</td>
<td>238</td>
</tr>
<tr>
<td>The Zone</td>
<td>235</td>
<td>86</td>
<td>321</td>
</tr>
<tr>
<td><strong>Incentives</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal FM radio</td>
<td>483</td>
<td>264</td>
<td>747</td>
</tr>
</tbody>
</table>

Source: Socialdata and Sustrans, March 2007, Table 2.5, information materials and incentives delivered, in 'Peterborough My Travelchoice ITM Programme, Stage 3 Field Report, Bretton, September–December 2006'.
2.29 The most popular information materials amongst participants so far (stages 1–3) have been:

- local travel maps (multi-modal map and local directory specific to each stage);
- *Getting about Peterborough – the guide* (Stagecoach area-wide bus map);
- bus stop timetables;
- Peterborough cycle map;
- Peterborough city trail (walking guide).

2.30 One problem initially was the accessibility of information materials for those who do not speak or understand English. Peterborough has received a high number of immigrants over the past few years, such that it is estimated that 100 languages are spoken by residents of the city (*Peterborough Today*, 27/2/07). PCC felt that they should adapt to the needs of the local population, and therefore produced an information flyer translated into the top seven languages. This leaflet directs people to their local community centre, where they are able to access all the travel information they require and complete the service sheet. Their pack with the information they requested is then delivered to their door as normal. While this helps meet the objectives of the ITM programme, it also helps meet other council objectives such as social inclusion and accessibility, which are additional benefits of the project.

2.31 In addition to the marketing materials, gifts and incentives were also provided to participants at different stages of the ITM process to encourage modal change and participation. Table 2.3 lists the incentives and rewards utilised.
PCC has learnt many lessons throughout the process of operating the ITM scheme from the first three stages. For each stage they have felt that the information and products provided by PCC have improved as officers learnt what information is in demand and how to deliver this information. For stages 4 and 5, it has been decided that the ITM project will be publicised much more in an attempt to increase awareness of the scheme and improve the chances of it being effective. This will include putting up posters throughout the city along key routes where the programme will be rolled out (an example of the poster is shown in Figure 2.3), issuing press releases, putting articles in the Good Going newsletter (which is distributed to 1,500 households), competitions and commuter challenges involving ‘races’ between cyclists/bus users and cars. Other promotions include articles in community newsletters and presentations to community action groups, along with various other events held throughout the duration of the final two stages.

Table 2.3: Rewards and incentives provided for participants in Peterborough

<table>
<thead>
<tr>
<th>Incentive/reward</th>
<th>To whom offered</th>
<th>When offered</th>
<th>Why</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal FM radio</td>
<td>Groups I and R with</td>
<td>At stage of completing the service sheet (information request form)</td>
<td>To maximise response</td>
</tr>
<tr>
<td>Parker rollerball pen or travel alarm clock</td>
<td>Groups R with and R without and group I who regularly walked or cycled</td>
<td>Offer was made on a separate mail back order form (after the conversation and segmentation had taken place)</td>
<td>To confirm and reward their behaviour</td>
</tr>
<tr>
<td>Two vouchers each valid for a free one-week Stagecoach Megarider ticket</td>
<td>Households receiving a public transport home visit</td>
<td>When home visit was conducted</td>
<td>To encourage participants to try the bus services</td>
</tr>
<tr>
<td>Bike health check and free cycle trip computer</td>
<td>Households receiving a cycling home visit</td>
<td>When home visit was conducted</td>
<td>To encourage participants to cycle more</td>
</tr>
<tr>
<td>Free step-o-meter</td>
<td>Households receiving a walking home visit</td>
<td>When home visit was conducted</td>
<td>To encourage participants to walk more</td>
</tr>
</tbody>
</table>

2.32 PCC has learnt many lessons throughout the process of operating the ITM scheme from the first three stages. For each stage they have felt that the information and products provided by PCC have improved as officers learnt what information is in demand and how to deliver this information. For stages 4 and 5, it has been decided that the ITM project will be publicised much more in an attempt to increase awareness of the scheme and improve the chances of it being effective. This will include putting up posters throughout the city along key routes where the programme will be rolled out (an example of the poster is shown in Figure 2.3), issuing press releases, putting articles in the Good Going newsletter (which is distributed to 1,500 households), competitions and commuter challenges involving ‘races’ between cyclists/bus users and cars. Other promotions include articles in community newsletters and presentations to community action groups, along with various other events held throughout the duration of the final two stages.

8 And that did not already use public transport regularly.
2.33 PCC will monitor their success in promoting the ITM scheme and the Travelchoice project as a whole by undertaking a brand recognition survey to examine people’s views of Travelchoice using an existing Citizens Panel set up by PCC.

**Funding**

2.34 The funds from the DfT are central to ITM and the STT project as a whole (see section on costs below). PCC will have to consider a number of ideas for further long-term funding (independent of DfT grant support), as the funding for the DfT ends in April 2009. Much depends on the success of the ITM project and the Travelchoice project overall, and an exit strategy will be developed for the Travelchoice project over the next year. The options are as follows:

- Section 106 funds (however, the proportion of these funds that can be used for ITM/Personal Travel Planning is uncertain);
- travel plans;
- LTP delivery grant (subject to the approval of the LTP auditors, and the long-term sustainability of the PTP approach);
- other grants.

**Costs**

2.35 Total cost of the ITM programme over three years (with a target population of approximately 30,000 households), including Sustrans/Socialdata costs but excluding PCC staff time and costs for materials is £670,821. This equates to £22.36 per household targeted.

2.36 When costs are broken down, there are a further two areas that require additional funding – the production of materials and monitoring. Both the first and second interim surveys cost £33,500 each. Initial costs for providing new information materials were relatively high, but officers have now found ways to produce materials more efficiently and at a lower cost. For stages 4 and 5, there is a budget of £10,000 for producing the materials required, and the team rely on external supplies of free information.
Integration with other transport related initiatives/projects

2.37 The ITM project is a major component of the STT initiative (which also includes car sharing, business travel planning and real-time passenger information). The My Travelchoice brand has been commonly used for all ITM initiatives, in addition to LTP projects. This is to ensure continuity of the message being portrayed to local residents and also improve the chances of the brand becoming well recognised throughout Peterborough and used when the Travelchoice project and/or funding comes to an end.

2.38 Before the ITM project commenced, Stagecoach introduced the new Citi network providing 10-minute frequency services throughout the city. There was insufficient advance warning of these service changes (within the ITM project team), and as a result they cased serious disruption to stage 1. Some updated information materials were not available in time for household deliveries, so had to be mailed out afterwards. The route changes also rendered the local travel map developed by PCC for stage 1 out of date.

2.39 In April 2006, just before stage 2 of the ITM project, PCC re-branded the Local Link network of buses that provide access to urban and rural areas that are not catered for through the commercial bus services provided by Stagecoach. As a result of the re-branding, service numbers and routes changed, which resulted in some materials not being available for the start of stage 2. To combat this, notes were included in the packs to make people aware of the updates to materials and distributed new materials once they were printed.

2.40 PCC have introduced text-and-go real-time bus passenger information to make travel on public transport easier for users.

Evaluation

2.41 The baseline data was collected in 2004 using a postal survey enquiring about household and personal travel behaviour. The survey was completed by a random sample of 4,461 people across Peterborough. In addition, a series of in-depth interviews were held with 400 people to discover their attitudes to transport issues and help understand their daily travel choices. The findings provided an insight into the potential for reducing car use by encouraging people to make more use of sustainable travel modes (walking, cycling, public transport and car sharing).

2.42 Interestingly, the wealth and depth of information collected through the baseline survey has proven valuable more widely, for example in informing the LTP2 targets and in disseminating positive PR messages to the public.

2.43 The interim evaluation process adopted by Peterborough provides a more in-depth analysis of the isolated impacts of ITM (when compared to Worcester), and is also the subject of an independent audit being carried out by the Institute for Transport Studies at Leeds University.
2.44 The first interim travel behaviour survey was conducted from the end of February to mid-April 2006 using the same methodology as the baseline research programme. The survey samples were 1,229 persons (net) drawn from the target population for stage 1 of ITM programme and 666 persons (net) drawn at random from the rest of the city as a control group.

2.45 The stage 1 evaluation report reviews the findings of an analysis of data from the interim travel behaviour survey (representing the ‘after’ case), compared with those of the baseline research programme conducted in September–November 2004 (‘before’). The key points from this document are detailed below.

**Impact and effectiveness**

2.46 The reported results present the findings on travel behaviour from the baseline and interim surveys for both target and control groups. For each main travel mode, it demonstrates the changes in trips per person per year among the target group, with changes in the control group taken into account.

2.47 Figure 2.4 shows the net effect of the ITM programme on mode choice when compared to the control group. It shows that walking trips increased from 20% of total trips to 24%, while cycling increased from 5% to 6% of modal share. The proportion of trips made as a car driver decreased from 43% of modal share to 38%, while the proportion of trips as a car passenger also fell, but by just 1% from 25% to 24%. Public transport trips increased from 7% to 8%.

![Figure 2.4: Effect of ITM on mode choice in Peterborough](image)
2.48 Figure 2.5 shows the changes in mode choice in terms of trips per person per year and illustrates the relative changes achieved by the ITM intervention. The net result was a 13% relative reduction in car as driver trips. This was achieved by switching 58 car driver trips per person per year to other modes, i.e. an average across the target population of just over one trip per person per week. A further 18 trips were switched from car passenger to other modes.

2.49 Among the sustainable travel modes, walking saw the biggest absolute gains, with an additional 45 trips per person per year being made on foot, a relative increase of 21%. From lower baseline levels, cycling and public transport also increased, by 25% and 13% respectively.

Figure 2.5: Changes in mode choice in Peterborough

<table>
<thead>
<tr>
<th>Mode</th>
<th>Trips per person per year</th>
<th>With ITM</th>
<th>Relative changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>210</td>
<td>255</td>
<td>+21%</td>
</tr>
<tr>
<td>Bicycle</td>
<td>49</td>
<td>61</td>
<td>+25%</td>
</tr>
<tr>
<td>Motorbike</td>
<td>2</td>
<td>2</td>
<td>-</td>
</tr>
<tr>
<td>Car as driver</td>
<td>453</td>
<td>395</td>
<td>-13%</td>
</tr>
<tr>
<td>Car as passenger</td>
<td>267</td>
<td>240</td>
<td>-7%</td>
</tr>
<tr>
<td>Public transport</td>
<td>69</td>
<td>78</td>
<td>+13%</td>
</tr>
</tbody>
</table>

2.50 There were no significant changes in personal daily mobility as a result of the ITM intervention. This confirms that, while ITM clearly influenced how residents travel, it had no significant impact on the number of activities they undertake on a daily basis, their daily travel demand (measured by number of trips and distances travelled), or (despite the shift from car travel to more sustainable modes) on time spent travelling.

2.51 Figure 2.6 shows that there was no change in the number of cars owned by households in the project area, remaining constant at 6,900. However, the distance travelled per car per day reduced by 15% (from 26.4 to 22.5 km), resulting in a net saving of 9.1 million car km per year.
Over the course of a year, the ITM project contributed to an increase in the total exposure to active travel from 120 to 142 hours per person (see Figure 2.7). This 18% increase is likely to make a significant contribution to increasing overall levels of physical activity amongst the target population.

Figure 2.7: Hours travelled (by active travel modes) per person per year in Peterborough

<table>
<thead>
<tr>
<th>Hours per person per year</th>
<th>Without ITM</th>
<th>With ITM</th>
<th>Change (hours)</th>
<th>Relative change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>120</td>
<td>142</td>
<td>+22</td>
<td>+18%</td>
</tr>
</tbody>
</table>

Figure 2.6: Distance travelled per car per day in Peterborough

<table>
<thead>
<tr>
<th>Without ITM</th>
<th>With ITM</th>
</tr>
</thead>
<tbody>
<tr>
<td>6,900 (Private) Cars in total</td>
<td>6,900</td>
</tr>
<tr>
<td>26.4 Kilometres per day per car (everyday mobility)</td>
<td>22.5</td>
</tr>
<tr>
<td>62.0 million Total kilometres per year (341 days) in millions</td>
<td>52.9 million</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reduction (km per year)</th>
<th>Relative reduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>~9.1 million</td>
<td>~15%</td>
</tr>
</tbody>
</table>

Figure 2.8 shows the effect on mode choice for different types of trips. The greatest relative reductions in car use, and increases in sustainable travel modes, were for work journeys. However, significant modal shift was evident for all other trip types, notably for shopping, personal business and leisure, as well as a significant increase in use of sustainable travel modes for education trips.
2.54 Results from the baseline travel behaviour survey were disseminated to every household in Peterborough through a leaflet entitled *The Facts – how, when and why you travel*, the front cover of which is shown as Figure 2.9.

**Conclusions of evaluation**

2.55 The following points highlight the conclusions emanating from the evaluation:

- There is evidence that stage 1 of Peterborough’s My Travelchoice ITM programme achieved significant changes in travel behaviour among the target population of 6,500 households.

- Analysis of the data from the baseline and interim travel behaviour surveys shows a 13% relative reduction in car driver trips across the target population. This was equivalent to a reduction of 58 car driver trips per
person per year across the target population, or a little more than one trip per week.

- This reduction was generated by significant relative increases in levels of walking (21%), cycling (25%) and public transport use (13%). In absolute terms, the most significant contribution to this change was made by the growth in walking, which gained 45 trips per person per year.

- The reductions in car use were concentrated during the morning and afternoon peaks, suggesting that ITM makes a significant contribution to tackling traffic congestion. Furthermore, the resulting 15% reduction in car distances travelled (equivalent to 9.1 million km per year) will generate a substantial cut in CO₂ and other vehicle emissions.

- The reported modal shift resulted in an 18% increase in daily use of active travel modes (walking and cycling) across the target population, either as main travel mode or as linking mode in a car or public transport trip. The additional time spent walking or cycling (amounting to an average of 4 minutes per person per day) will help achieve physical activity targets.

- These results show that the positive responses from the local community to stage 1 of the My Travelchoice ITM programme (which resulted in a total of more than 27,000 items of information, incentives and rewards being delivered to nearly 2,800 households) were translated into significant behavioural change.

- These outcomes, and the experience gained by all project partners in achieving them, provide a solid foundation for the remainder of the My Travelchoice ITM programme and making a case for further ITM beyond.

**Shortcomings**

2.56 There are only a limited number of areas where shortcomings have been identified and these are as follows:

- Leaflet and product development can be very time-consuming.

- When there are bus service changes, materials become out of date. This requires good communication between stakeholders to ensure materials can be prepared in advance for the changes coming into force.

- During stage 1 there were difficulties in recruiting and retaining field staff with the appropriate skills, because of the nature of the local employment market. Changes to the recruitment processes and retention of a core of experienced field staff have overcome this problem in subsequent stages.

- There is a need to inform council members more on the successes of the ITM project and also provide feedback to the public, e.g. through the PCC website.
• There were some initial difficulties in securing good internal communications (i.e. with other teams within the authority).

Other issues

2.57 During the discussions there were a number of other issues that are relevant to the Making PTP Work study. These are:

• The strength of the supporting partnerships has been important in maintaining momentum and widening the dissemination of results. Stakeholders for the project include local businesses, the bus and rail operators, local charity organisations such as Peterborough Environment City Trust and the NHS/PCT.

• The flow of knowledge from the PTP project has been useful in other areas, for example in feeding information to the bus users forum, informing on the development of concessionary fares and the potential for service improvements.

• The importance of regular progress meetings – whilst these are structured every two to three months, many more informal meetings are held between the client and consultant teams to ensure the smooth day to day running of the project.

• Engagement and personal contact are the key to success – the Peterborough approach is seen as a bottom-up process and driven by the needs of the local population.

• The branding for the ITM project was adapted from Your Travelchoice to My Travelchoice to strengthen the local buy-in to the project.

• The training of fieldwork staff has been rigorous and well managed – all staff are committed to the sustainable transport agenda and able to work with the public in an appropriate manner (there is also a clear recognition of the role of on-the-job training).

• Four out of the five original Travelchoice team members remain in place – it has been a rewarding experience for all staff members involved.

• The Good Going pledge card has been a success, with some 1,500 registered users pledging to reduce their car use. These people provide a voluntary database for future marketing material and are sent a newsletter once every two months informing them of Travelchoice events. This card is offered through the ITM project and offers card holders discounts at a range of outdoor and cycle shops, along with discounts to places of interest in the city.

• The impact of the ITM has also been seen to be supporting BVPI indicators (bus passenger satisfaction and satisfaction with bus information).
3. Darlington – Sustainable Travel Town

3.1 Interviewees:

- Owen Wilson, Principal Transport Officer, Darlington Borough Council, and Sustainable Travel Town Project Manager;
- Penny Marshall, Transport Policy Advisor, Government Office for the North East, and GONE representative on the Darlington Sustainable Travel Town Reference Group;
- Martin Higgitt, Principle Transport Planner, Steer Davies Gleave, and Darlington ITM Programme Delivery Manager.

General background

3.2 The Individualised Travel Marketing (ITM) programme is a key element of Darlington’s Sustainable Travel Town (STT) delivery package. It was a central part of what Darlington promised to do if it was chosen for inclusion in the national STT demonstration project. Nevertheless, it had been implied in the guidelines available to STT bidders that their chances of success would be enhanced if bids included an element of, among other things, personal travel planning (PTP). In turn, the Smarter Choices research that had emerged around that time had reinforced the potential of PTP initiatives, and both local and national government were looking for opportunities to explore this potential.

3.3 In Darlington, the ITM programme is being rolled out in three phases: the first phase took place between April and August 2005; the second between April and September 2006; and the third (slightly delayed due to local elections) is taking place between May and September 2007. Following completion of the three delivery phases, independent monitoring of the effectiveness of the programme will take place during the subsequent 12 months. So, the final reporting on the programme will take place in summer 2009, once the results of a large-scale travel research programme scheduled to take place in autumn 2008 are available.

3.4 Darlington successfully bid to become one of the three STT demonstration projects, part-funded by the Department for Transport (DfT), in 2004. This led to an STT project launch early in 2005, under the banner ‘Darlington, a town on the move’, soon followed by work on the ground, including the first phase of the ITM programme. During the initial year of STT status it became apparent that the project did not have a sufficiently strong identity among residents of, and visitors to, Darlington. A marketing agency was thus engaged to raise the public profile of the STT work, resulting in two key developments: adoption of ‘Local Motion’ as a project brand name (while retaining the strap line ‘Darlington, a town on the move’); and downplaying the role of Darlington Borough Council.
in coordinating the campaign (which manifested itself in measures like the removal of the local authority's name and logo from Local Motion-related literature). The latter move was deemed necessary to win wider public support for the STT project, as the borough council came to acknowledge that it can, too often, be associated with ‘telling people what they can’t do’. The brand name ‘Local Motion’ not only suited Darlington’s strong sense of place (hence the emphasis on the word ‘local’), but also its railway links. That the chosen brand name is not mode-specific was another factor in its favour.

3.5 A launch of the Local Motion branding took place in spring 2006, including a short ‘teaser campaign’ with a Kylie Minogue look-alike walking around the town under heavy personal security (as if she were the real thing). This was followed by a launch event in the town’s Market Square, involving several hundred school children, invited members of the community and the general public. The Kylie look-alike launched the brand singing ‘Do the Local Motion’, which attracted a good deal of positive, if rather bemused, media interest.

3.6 The ITM programme is being delivered to all 39,000 households in the urban area of Darlington, covering a population of some 90,000 (the borough has a total population of 99,000).

3.7 The first phase (2005) targeted some 12,500 households in the north and north-west of the town. Wards covered were Harrowgate Hill, North Road, Faverdale, part of Pierremont, Cockerton East and Cockerton West. The second phase (2006) targeted 12,000 households in the ‘inner west end’ and in the north-east of the town. Wards covered were Central, College, Haughton East, Haughton North, Haughton West, Northgate, Park West and part of Pierremont. The third phase (2007) is covering the remaining 14,500 households across the far west and southern half of the town. The boundaries of the areas covered during the three delivery phases can be seen in Figure 3.1.
3.8 The ITM Programme in Darlington is being delivered by Steer Davies Gleave, who won the three-year contract by competitive tender.

**Targets and objectives**

3.9 The second Darlington Local Transport Plan 2006–11 (LTP2) includes a number of targets, in Chapter 7, which relate specifically to the ITM programme. These include:

- reducing by 10% car driver trips by Darlington residents, from 41% to 37% of all journeys, during the LTP2 period;
- reducing the overall traffic growth forecast for Darlington from a low growth TEMPRO forecast of 8.6% to a (very low) 3%, during the LTP2 period;
- an 8% increase in the number of walking trips, from 25% to 27% of all journeys, during the LTP2 period;
- a 300% increase in the number of cycling trips, from 1% to 3% of all journeys, during the LTP2 period;
• maintaining bus patronage levels well above the national average (currently 12% of all trips, twice the national average) during the LTP2 period, and reducing the annual rate of decline from 2.5% to 0.5% p.a. towards the end of the Plan period, in a falling market;

• a 10% reduction in the proportion of school journeys made by car, from 26% to 23.5% of such trips, during the LTP2 period.

3.10 All modes of sustainable transport are being endorsed through the ITM programme in Darlington, with no one mode being favoured in terms of the level of investment in its promotion. Nevertheless, there is a perception that cycling is being given a particular boost. The reasons for this are likely to relate to the following:

• in addition to securing STT status in 2004, in 2005 Darlington was also chosen as one of the six national Cycling Demonstration Towns (CDTs), which brought with it additional resources for investment in this mode;

• the local media seem particularly interested in picking up novel cycling-related stories;

• as cycling is both the most under-utilised mode and the one with the greatest potential for modal shift, there is the most ground to cover in realising its potential;

• of all the sustainable travel modes, increases in cycling are the most visible.

3.11 Again, no particular journey types are being targeted through the ITM programme, despite the findings of the baseline survey (see Evaluation section) which suggested that leisure and shopping trips are the most ripe for conversion to sustainable modes.

3.12 The Steer Davies Gleave approach to ITM is based on a ‘conversation’ between a member of the delivery team and the household members, through which the latter’s specific journey patterns, requirements and constraints are mapped out and, if the household is willing, a tailored package of sustainable travel-related advice provided. So, the ITM response is influenced by the topics covered in the ‘conversation’, rather than the ITM advisor providing advice on a pre-determined range of mode or trip types. It may also have proved counter-productive to place too heavy an emphasis on leisure shopping trips, in particular, as Darlington town centre has been undergoing significant environmental improvements during the past couple of years. When complete, this will provide much-enhanced access and conditions for pedestrians, cyclists and bus users, but the protracted works have inevitably resulted in inconvenience to all road users during the construction phase.

3.13 In addition to helping to meet specific targets, the ITM programme could be said to contribute, in some way, to all the local objectives in Darlington’s LTP2. These are

• Objective A: To provide the environment for sustainable development of new and existing business, housing and services in Darlington;
Objective B: To improve access to employment, education, health, fresh food and leisure, particularly for those without access to a private car and for those that have greatest need;

Objective C: To tackle traffic congestion on key corridors and its potential effects on the economy and environment by making the most effective use of the transport network;

Objective D: To improve travel safety and security for all by addressing the real and perceived risks;

Objective E: To provide and promote travel choices for all, in particular to reduce the proportion of car driver trips.

3.14 Again, in addition to measuring progress towards meeting the LTP2 target outlined above, other indicators being used to assess the impact of the ITM programme include:

- the number of households actively participating in the programme;
- the number of individuals signed up as Local Motion Club members;
- the take-up of school-based pedestrian and cycle training schemes;
- the take-up of adult cycle training;
- level of awareness/understanding of the Local Motion brand (to be tested in 2007 through surveys and focus groups).

Sociological behavioural theories/behavioural underpinning

3.15 On the theory underpinning PTP in Darlington, the programme delivery manager commented: ‘Our approach to ITM cherry picks a range of concepts from the behaviour change literature. This includes reciprocity, manifested in giving out ‘bags for life’ as an incentive. Reciprocity also underpins the way the travel adviser summarises the ‘conversation’ to make it feel like a deal: ‘I’m going to send you x, y and z, and you’re going to have a look at the resources and see if you can try (this and/or that). Commitment is increased by getting customers to sign for the Local Motion Club card on the doorstep and by encouraging them to take part in challenges, which are sold as ‘low risk experiments’. Social norms/social proof is tackled through trying to identify ‘dynamos’. These are ordinary people who are already travelling sustainably, or who make a change as a result of the project, and then disseminating their good news story through marketing material surrounding the project. Rewards are also used to reinforce positive behaviour, and these are distributed through incentives for the challenges, prize draws, etc. Self-efficacy is tackled as a part of the conversation: many people say ‘I can’t walk/cycle that journey because…’, but those perceptions are challenged as part of the conversation process.'
3.16 There is a growing acknowledgement among those responsible for delivering the Darlington ITM programme that, while it is useful to tie PTP initiatives into infrastructure and service improvements, this is not an absolute requirement. This supports the theory that around half of changes in behaviour relate to personal values and beliefs, rather than external factors. It then follows that those who consider that ITM is only effective on the back of tangible changes in the sustainable travel ‘offer’ overlook what PTP can do alone. As the Darlington ITM delivery manager put it: ‘Change comes from inside people and that often happens in spite of the transport services around them. Clearly, tying an ITM programme to infrastructure and service improvements is a good idea, but a lack of such improvements should not be seen as a reason not to do it.’

Operating structure of scheme

3.17 The brief to the delivery consultants was to include all Darlington households in the ITM programme. While some other PTP projects concentrate on areas they consider to be most receptive to this type of intervention, the blanket coverage in Darlington will, hopefully, offer further insight into what types of neighbourhoods/households are most responsive to this sort of treatment.

3.18 If modal shift is the primary (only) objective, then blanket coverage of PTP is not cost-effective. However, social inclusion issues were influential in Darlington’s decision to include all Darlington’s households in their ITM programme.

3.19 Steer Davies Gleave have set up an office in central Darlington for coordinating delivery of the ITM programme. Here, two office staff are employed throughout the three-year programme. For the delivery phases, a team of 10–12 travel advisors is recruited and trained. ‘Listening skills and the ability to converse with a wide variety of people’ are the essential skills required of applicants to these posts. The travel advisor team is recruited for around four months, paid £8–10 per hour, work a 37.5 hour week (including some evenings up to 20:00 and some Saturdays). This team wears red Local Motion branded polo shirts and sweatshirts, which helps to raise and reinforce awareness of the campaign, and gives the team an identity on the street.

3.20 The recruited delivery team commence each phase with an intensive training programme to equip them with the skills to deal with the multitude of situations they are likely to face and, not least, ‘to avoid them sounding like a double-glazing salesperson’. The training involves lots of role-play, commencing with managing acquiescent and interested respondents, leading on to exposure to the uninterested and more difficult people. Abstract role play exercises are eventually replaced with real-life doorstep experience, where trainees are initially shadowed by experienced door-knocking travel advisors.

3.21 The Steer Davies Gleave approach to PTP, which Darlington Borough Council has coined Individualised Travel Marketing (ITM), centres on a ‘conversation’ that a trained travel advisor has with members of a
household. The conversation aims to establish the travel patterns, needs and constraints of household members and subsequently provide a tailored package of information, advice, incentives and practical support to enable members of that household to make more of their journeys by sustainable modes. Once the ITM delivery area has been defined, the process starts with all residential addresses in that area receiving an introductory letter about the programme and advance notice that a travel advisor will be contacting them within the next few days. At the start of the programme in Darlington, the next stage of contact was a mix of door-knocking and telephone calls. However, with an increasing number of people signing up to the Telephone Preference Service, the proportion of households contactable by phone decreased to the level where it was felt it was not cost-effective to use telephone contact in the first instance, and easier to simply door-knock the whole area to start with. Where a large number of no-contacts are encountered, Steer Davies Gleave will attempt to make contact with some of these households by phone, after door-knocking. Doorstep contact is attempted four times, once on a weekday daytime, once on a weekday evening, once on a Saturday, and a final attempt on a weekday daytime or evening. With failure to contact households on the fourth visit, a ‘Missed you’ leaflet is posted through the door, encouraging residents to make contact to explore participation in the project. This stage results in households being classified into one of the following categories:

- participating: households who were involved in a structured conversation and requested a resource;
- not participating: households where contact was made but there was no request for a resource;
- no contact: households where after four knocks no conversation had been had with a household.

3.22 The ITM programme in Darlington has a target of encouraging 50% of all households to participate (the 50% of non-participants includes the ‘non-contactable’). During the first phase of ITM delivery, between April and August 2005, 30% of households were non-contactable. This is relatively high compared to other UK-based PTP projects and has been attributed, at least in part, to running that first phase of the Darlington programme during the summer holiday period. To date, participation rates in the first phase of the project were 40% of households, rising to 48% in the second phase.

3.23 Commenting on how the ‘conversation’ model has evolved, a Steer Davies Gleave representative observed: ‘The “conversation” seems to work well, as it is reactive and responsive to individual households’ needs. We want to create an impression of offering a valuable (free) customer service, not finger-wagging. Travel advisors are taught to listen out for key motivators in the conversation, to determine what type of messages and incentives people will respond positively to, and which sustainable modes they’re most likely to try.’
3.24 The first doorstep meeting is when the ‘conversation’ generally takes place, which usually takes around 10 minutes. The conversation concludes with the travel advisor summarising what has been discussed and agreed and, if the household is willing to participate further in the ITM programme, what information/incentives will be provided. For any particular neighbourhood there are around 20 resources to choose from, although bus timetables are counted as one resource, yet may comprise a number of discrete timetables. All the resources are kept at Steer Davies Gleave’s ITM office in Darlington, from where they are dispatched. As a guide to relative popularity of what’s on offer, the list of the resources available for the second delivery phase, and the percentage of households requesting each one, is given in Table 3.1.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Households making a request (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Community guides</strong></td>
<td></td>
</tr>
<tr>
<td>Community guide – College</td>
<td>35.1</td>
</tr>
<tr>
<td>Community guide – Haughton</td>
<td>33.0</td>
</tr>
<tr>
<td>Town centre guide</td>
<td>0.8</td>
</tr>
<tr>
<td>Town centre walk map</td>
<td>7.3</td>
</tr>
<tr>
<td><strong>Cycling information</strong></td>
<td></td>
</tr>
<tr>
<td>Borough cycle map</td>
<td>38.3</td>
</tr>
<tr>
<td>Cycle training flier</td>
<td>4.7</td>
</tr>
<tr>
<td>Pedal power cycle leaflet</td>
<td>10.1</td>
</tr>
<tr>
<td><strong>Walking information</strong></td>
<td></td>
</tr>
<tr>
<td>Leisure walks booklet</td>
<td>57.3</td>
</tr>
<tr>
<td>Historic walks</td>
<td>33.7</td>
</tr>
<tr>
<td>Countryside events guide</td>
<td>21.5</td>
</tr>
<tr>
<td><strong>Bus information</strong></td>
<td></td>
</tr>
<tr>
<td>Borough and town bus map</td>
<td>23.9</td>
</tr>
<tr>
<td>Area service guides</td>
<td>5.6</td>
</tr>
<tr>
<td>Bus times from your stop</td>
<td>9.1</td>
</tr>
<tr>
<td>Bus timetables</td>
<td>9.6</td>
</tr>
<tr>
<td><strong>Car information</strong></td>
<td></td>
</tr>
<tr>
<td>Getting the best from your car leaflet</td>
<td>22.1</td>
</tr>
<tr>
<td>Car-share flier</td>
<td>0.8</td>
</tr>
<tr>
<td><strong>Other resources</strong></td>
<td></td>
</tr>
<tr>
<td>Personalised journey plans</td>
<td>0.8</td>
</tr>
<tr>
<td>Keeping in motion</td>
<td>12.8</td>
</tr>
<tr>
<td>Kids activities</td>
<td>4.9</td>
</tr>
<tr>
<td><strong>Supporters’ resources</strong></td>
<td></td>
</tr>
<tr>
<td>Supporters’ pledge</td>
<td>1.2</td>
</tr>
<tr>
<td>Supporters’ congratulations letter</td>
<td>4.4</td>
</tr>
<tr>
<td>Supporters’ standard thank you letter</td>
<td>38.6</td>
</tr>
</tbody>
</table>
3.25 For the first two years, information requests have been mailed out to households. However, in response to concerns about the cost and reliability of the Royal Mail service used for this task, for the third and final phase the information will be delivered by ‘green’ courier (i.e. by bike). The courier, who also does other work for Darlington Borough Council, is prepared to wear the Local Motion ‘uniform’ for the ITM delivery rounds. It is felt that this development has further contributed to the visibility of the project and awareness of the Local Motion brand.

3.26 A master database is maintained to manage the ITM programme in Darlington, containing information on which households have been approached, contacted and are participating in the programme; also the information requirements identified and dispatched; together with details of Local Motion Club members (see Marketing and promotion).

3.27 In collaboration with the other STTs, Peterborough and Worcester, which also had PTP-related projects in the STT work programmes, Darlington arranged for Sustrans and Socialdata to organise training for relevant council staff and members on ways to promote walking, cycling and public transport use. This took place towards the beginning of the STT project and was considered very useful by those involved.

3.28 Decisions on issues such as what the ITM targets, outputs and indicators should be were agreed with Darlington’s STT Reference Group. This is an advisory board rather than an executive decision making body, yet is considered to have a valuable role in raising awareness and support for the STT project among the wider community. It is chaired by a local businessman (and senior Barclays Bank employee) and includes representation from the Local Strategic Partnership, business and voluntary sectors, the health sector (the PCT as well as the acute trust), education (a head teacher), the Government Office for the North East (GONE) (Penny Marshall), cycling groups, disability groups, the Cabinet member for transport as well as the opposition spokesperson for this issue. STT Reference Group meetings are held quarterly, and are also attended by relevant borough council officers.

**Marketing and promotion**

3.29 A variety of resources have been developed to support the ITM programme in Darlington, all branded with the Local Motion logo but not, as mentioned above, the borough council’s. Table 3.1 in the previous section provides an indication of the range of resources that has evolved, which has been informed by feedback from delivery of the ITM programme in the field. Figures 3.2–3.5 show four examples of these resources.
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Figure 3.2: Local Motion bus route guide

Figure 3.3: Local Motion flyer on cycle training

Figure 3.4: Local Motion leisure walks guide

Figure 3.5: General brochure explaining the Local Motion campaign
3.30 Elements of competitiveness and incentives have been introduced as the project has developed, partly in response to ideas from the marketing agency engaged during the first year of the project, and partly in response to experience and ‘customer feedback’.

3.31 During the second year of the campaign the Local Motion Club was launched. Once they have signed up, members immediately get a loyalty card, then receive a newsletter approximately every two months. Households are invited to join the Local Motion Club during their doorstep ‘conversation’, and around half of those who participate in the wider ITM programme do sign up to Club membership. Other opportunities to attract members include more general STT-related promotional events, school and workplace travel plan-related promotional events, and through media coverage. Of the 4000 current Club members, 3,000 were recruited on the doorstep.

3.32 The Local Motion Club functions, in part, to address the problem that a good deal of weight in the delivery, and in the ongoing sustainability, of ITM rests on a single conversation. The Club, particularly through the magazine, is an attempt to maintain contact with those who have been engaged in the programme, advising them of relevant changes and improvements in sustainable travel infrastructure and services, as well as relevant initiatives they might like to get involved in (e.g. organised leisure bike rides), and rewarding them for their continued support with discounts and gifts (e.g. cut-price theatre tickets). Each issue of the magazine usually also features an inspirational story about Darlington residents who have adopted healthy and more sustainable travel patterns. An example of the magazine is shown in Figure 3.6.

3.33 The newsletter is also used to launch periodic ‘challenges’ and invitations to take part in special active travel programmes, both employing the offer of free goodies to encourage participation. For example, in May 2007 the 10,000 steps challenge was launched, with a free T-shirt, pedometer and record card for the first 300 to register. Ten participants in this challenge are also being invited to take part in a 12-week active lifestyle programme, including free health checks, group personal training sessions, and three months’ free use of a gym, swimming pool and fitness classes.
In relation to encouraging walking, the following promotional tools have been developed:

- a personal journey planner, i.e. assistance finding the best pedestrian route between two locations, given certain parameters (e.g. distance, attractiveness, safety);
- a pedometer to help measure distance travelled/number of steps taken;
- an MP3 player; and
- a drinks bottle.

In relation to encouraging cycling, the following promotional tools have been developed (many of these also support, and are at least part-funded from, the CDT budget):

- a personal journey planner, i.e. assistance finding the best cycling route between two locations, given certain parameters (e.g. distance, attractiveness, safety);
- a cycle computer to help measure distance travelled, among other things;
- an MP3 player;
- a drinks bottle;
- free tailored cycle training for adults and families, with tokens to put towards discounted cycle accessories for those who complete a training course;
- free bike loan for one month, for those who don’t own a roadworthy bike;
- advice on bike, and associated equipment, purchase;
- discounts at Darlington bike shops (10% off repairs, 5% off new bikes and free bike checks to Local Motion supporters);
- a programme of organised bike rides, from April through to September, to suit a wide range of tastes and abilities, including those billed as suitable for families and women-only rides; and
- organised cycling festivals that include, in addition to guided bike rides, cycling-related films.

Items such as MP3 players and drinks bottles are branded with the Local Motion logo.

In relation to encouraging bus use, the following promotional tools have been developed:

- the ITM programme can provide stop-specific information to individual households;
- a website that provides information on bus journey options between identified areas;
• a free multi-user ticket, for a limited period (usually one week), is offered to individuals classified as ‘non bus users but willing to give it a go’, to encourage them to at least trial this mode. The bus operators, in exchange for agreeing to engage in the ITM process, wanted assurances that the free tickets would not be handed out to existing bus users. This resulted in the development of tight criteria for their distribution, and only around 100 weekly passes have been distributed during the two delivery phases of the project to date. During the current, final, delivery phase these criteria will be relaxed and consequently, hopefully, more free trial bus tickets circulated. There is currently no monitoring system in place to assess how intensively the free bus passes are used – the only measure that can be made is whether a pass has been used at least once, or not at all.

**Funding**

3.38 Funding for the ITM programme in Darlington has come through the additional resources made available to the borough council from central government following Darlington’s successful bid to become a STT in 2004. STT funding continues until 2009, gradually decreasing towards the close of the programme, as the emphasis moves from implementation to monitoring. So, in 2007/08 the borough council will receive £790,000, but in 2008/09 this drops to £450,000. The STT budgets are primarily for the implementation of ‘soft’ measures, to be supported by infrastructure improvements secured through the LTP2 programme, developer contributions, investment by public transport operators, etc.

3.39 During much of the ITM programme in Darlington there have been two bus operators, Stagecoach and Arriva, both operating on tight margins, so their ability and willingness to contribute to the programme (financially or in kind) has been limited. Because of the tight margins there is also limited scope for service enhancements, and the ITM travel advisors have, at times, found it challenging trying to market a ‘product’ perceived as relatively poor. In May 2007, however, Arriva bought out the Stagecoach operations in Darlington: although, at the time of writing, this is still subject to Office of Fair Trading approval. While the impact of this development on the remaining few months of the ITM delivery phase is unlikely to be dramatic, a single operator is likely to offer better opportunities for developing a bus-related package of measures that support the principles of ITM in Darlington in the future.

**Costs**

3.40 Table 3.2 provides a breakdown of the costs associated with delivering the Darlington ITM programme during 2006/07, i.e. the second phase. These costs would be similar for years (phases) 1 and 3. In addition, there was the cost of the baseline travel survey in 2004, which was £115,000; the annual monitoring surveys, £33,000 each; Peter Bonsall’s ratification of the results from the monitoring surveys, £2,000 for each survey; and the final travel survey to be undertaken once the ITM delivery programme is complete, £115,000.
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3.41 In its STT bid, Darlington promised to integrate the proposed ITM delivery programme with its LTP2 capital programme. The decision to run the first phase of ITM in the north-west of the town was taken because, at the time, that offered the best opportunities for sustainable travel across the conurbation. The second phase included areas to the north-east of town that had recently seen improvements to bus services, as well as supporting infrastructure and information.

3.42 Since the launch of the ITM programme, Darlington has seen a number of initiatives and measures implemented that help support the objectives of the programme:

- Improvements for bus users have included the introduction of 11 easy-access buses and 50 new low-floor, accessible bus stops. New bus shelters have also been installed as part of the town centre pedestrianisation scheme.

### Table 3.2: Local Motion expenditure in Darlington

<table>
<thead>
<tr>
<th>Local Motion expenditure 2006/07 (£)</th>
<th>Project team: Director, Coordinator, Monitoring Officer, STP Officer, Communications Officer (part-time)</th>
<th>Acute Trust Travel Plan Officer</th>
<th>Steering Group and other consultation</th>
<th>Staff training and travel</th>
<th>Individualised Travel Marketing</th>
<th>Monitoring</th>
<th>Printing</th>
<th>Website</th>
<th>Travel awareness marketing events and incentives</th>
<th>Cycle and pedestrian training</th>
<th>Cycle loan scheme</th>
<th>Public transport (information placed at bus stops)</th>
<th>Workplace travel plans</th>
<th>Miscellaneous</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>146,611.21</td>
<td>6,170.00</td>
<td>1,246.51</td>
<td>3,925.38</td>
<td>293,779.62</td>
<td>38,191.00</td>
<td>30,186.11</td>
<td>17,990.00</td>
<td>159,084.35</td>
<td>70,957.32</td>
<td>2,974.64</td>
<td>7,881.19</td>
<td>6,013.52</td>
<td>4,248.82</td>
<td>789,259.67</td>
</tr>
</tbody>
</table>

Integration with other transport related initiatives/projects

- Improvements for bus users have included the introduction of 11 easy-access buses and 50 new low-floor, accessible bus stops. New bus shelters have also been installed as part of the town centre pedestrianisation scheme.
In addition to the town centre ‘Pedestrian Heart’ scheme, improvements for pedestrians have included £1.5 million scheme ‘Let’s Get Cracking’, to upgrade existing highways, including significant investment in improvements to footways and footpaths.

With the award of CDT status and additional funding of £1.5 million, the development of cycle routes has accelerated rapidly, with an emphasis on providing safer routes into the town centre and to schools.

Development of a Medal Motion campaign aimed at promoting sustainable travel to schools. Other school travel initiatives including six travel plans and Bike It campaigns at two schools.

Extension of workplace travel plans and a commuter ‘cycle to work’ challenge.

Evaluation

3.43 Prior to the start of the ITM programme, Socialdata/Sustrans carried out a baseline survey among the population of Darlington, during autumn 2004, to assess existing travel patterns, attitudes to transport planning, and the scope for change to more sustainable modes. This survey was in two phases:

- The first part of the research was a postal survey of household and personal travel behaviour on a random sample of 4,269 people drawn from the population of the Darlington area. The findings provided a representative picture of day-to-day travel by Darlington residents that enabled the borough council develop the Town on the Move programme and measure its success.

- The second part of the research consisted of a series of in-depth interviews with around 400 people to gauge their attitudes to transport issues and help understand their daily travel choices. The findings provided an insight into the potential for reducing car use by encouraging people to make more use of sustainable travel modes.

3.44 The findings and recommendations from the baseline survey have been used by the STT partners to inform their decision-making across many areas of work, not just the ITM programme. Some of the key messages to emerge from the baseline survey were:

- three-quarters of trips were made within the urban area;

- 56% of trips within Darlington could readily be made by sustainable modes, yet only 38% were being made by such means;

- leisure and shopping trips are those for which a switch to more sustainable modes is most likely;
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- of all the modes, cycling has the greatest potential for modal shift (although experience has shown that it is also the most difficult to get people to take up if they haven’t tried it before/for a long time);
- the young and older people are those already travelling most sustainably.

3.45 During the autumn of 2005 and 2006, interim travel behaviour surveys were conducted by Socialdata with the support of Sustrans to measure the effects of the first and second phases of the ITM programme. The findings were presented to Darlington Borough Council in April 2006 and March 2007 respectively, with the Phase 2 results currently (September 2007) being audited by an independent expert, Professor Peter Bonsall from the Institute of Transport Studies, University of Leeds. Separate reports are available for all the ITM monitoring and evaluation work, with a brief summary of the key findings from the Socialdata/Sustrans work contained in this report.

3.46 The objectives of the interim travel behaviour research carried out by Socialdata/Sustrans were to:
- undertake a travel behaviour survey on a sample of 1,000 people drawn from households in the target ITM area, with a proportional share of those participating in the ITM programme and those not participating (collectively known as the Target Group);
- undertake an identical travel behaviour survey on a random sample of 500 people drawn from the rest of Darlington urban area (the Control Group); and
- provide an analysis of changes in key mobility indicators in the Target Group and the Control Group relative to those measured during the baseline research in autumn 2004.

3.47 The survey design used is identical for all monitoring surveys and to that used in the baseline travel behaviour research. For each household, the survey consists of a household questionnaire and a set of individual travel diaries for each of its members for a nominated day of the week. The survey includes households completing travel diaries for all seven days of the week. To encourage a high response rate, a pre-paid return envelope is provided with the survey and motivational phone calls are undertaken. The survey aims to collect information on all trips to all out-of-home destinations on a nominated travel day for each household. More details about the survey methodology are contained in the separate reports on their findings.

3.48 The response rates to the ITM monitoring surveys that have been carried out in Darlington are high, over 60%, which has been attributed to the survey design and methodology, refined over many years, and to the fact that participating households are ‘pestered for a response’.
3.49 In addition to the travel diary and interview work, other means of gauging the effectiveness of ITM relate to the more general travel behaviour measurements the borough council undertakes for assessing progress towards LTP2 targets (see Targets and objectives section above), and in relation to its CDT status. Thus, for example, there are 15 automatic cycle counters on off-road routes across the urban area, which indicate upward trends in usage, although, as 10 of these have been in situ for less than 12 months, it is too early to demonstrate longer-term trends at these sites. Traffic flow data gathered using permanent (24/7) counters, operational since May 2004, shows a reduction in peak-hour flows on radial routes, while bus boarding figures show a slight increase on some routes, which is encouraging in a generally falling market.

3.50 In 2008 a final ITM monitoring survey will be undertaken by Socialdata/Sustrans, which will include efforts to determine where any modal shift has come from. It will, for example, endeavour to address:

- What type of people have changed their travel behaviour?
- Is it lots of people making small changes or a few people making big changes?
- What type of people are using which sustainable modes?

**Impact and effectiveness**

3.51 In September 2005 Steer Davies Gleave reported that 7,800 households (68% of the target population) had been successfully contacted during the first phase of the programme, and that 4,600 (40% of the target population) had participated. A total of nearly 10,000 resources were distributed, including community guides, cycle information packs, bus information packs and booklets on more efficient car use.

3.52 In September 2006 Steer Davies Gleave reported that 7,618 households (71% of the target population) had been successfully contacted during the second phase of the programme, and that 5,206 (49% of the target population) had participated. For this phase a total of nearly 20,000 resources were distributed. A number of the key findings from the Socialdata/Sustrans monitoring survey for the second phase of the project are summarised below.

3.53 The target population comprised 10,744 individuals. Of these 5,205 (49%) participated in the project; 2,394 (22%) declined to participate; and no contact was made with 3,145 (30%).

3.54 Among the Target Group, following ITM, the proportion of trips:

- on foot increased by 24%, from 25% to 31% of journeys;
- by bike increased by 100%, from 1% to 2% of journeys;
- by car drivers decreased by 12%, from 44% to 39% of journeys;
• by car passengers decreased by 10%, from 19% to 17% of journeys;
• by public transport remained static at 11% of journeys.

3.55 The survey revealed that the average distance travelled per private car per day was reduced by 11%, from 28 km to 25 km, resulting in an annual saving of 12.8 million car kilometres across the target area.

Successes and failures

3.56 As the programme is still in the process of delivery, identifying robust ‘successes’ and ‘failures’ would be premature. However, the following interim thoughts from the interviewees are worthy of consideration.

Successes

• The ITM project (underpinned by Darlington’s STT and CDT status) has undoubtedly raised expectations about the potential and scope for getting the town ‘on the move’ in more sustainable ways and the opportunities for individuals to contribute to this process. This awareness is apparent not just among borough council officers and members, but community groups and the general public as well. A cycle campaign group has, for example, recently been established in Darlington: evidence of the enhanced opportunities for encouraging this mode, and greater scope for grass-roots involvement in shaping what form that encouragement takes. Again, a pressure group representing older people, GOLD (Growing Older in Darlington), has now started to press much more proactively for improvements to bus services for senior citizens.

• The ITM travel advisor reported that acceptance of the initiative on the doorstep has grown significantly over the life of the project. This has been attributed, in part, to increasing brand awareness, but mainly due to national media interest in the relationship between health, the environment and transport issues. The ITM project delivery manager commented: ‘Interestingly, when our travel advisers arrive at the doorstep, many people volunteer a range of green lifestyle behaviours: “I recycle a lot”, etc. So they seem to view the project as part of a broader lifestyle/environmental effort.’

• The STT/ITM work in Darlington supports the view that there is a need for revenue funding on education and awareness campaigns to realise the best value of capital funding on infrastructure. In areas where ITM has taken place, the modal shift to sustainable travel has been greater than in areas where it has not.

• The STT project has enabled Darlington Borough Council to progress initiatives complementary to ITM more quickly than would otherwise have been possible.
• The success of the ITM/STT programme rests to a significant extent on the personalities of those involved in supporting it at both an officer and member level. If they lack empathy and commitment, it will fail. Darlington has been fortunate in having strong positive leadership at both policy development and policy delivery levels.

• ‘Darlington now has the experience of running a town-wide campaign, and engaging constructively and intelligently with the media on this.’

Failures/shortcomings

• For its initial year, the STT/ITM programme lacked a strong identity. This was later rectified with the buying-in of services from a marketing company and launch of the Local Motion brand the following year.

• Significant effort was required in the first year of the STT/ITM programme to identify and fill gaps in the travel-related information portfolio, e.g. assembling an up-to-date and comprehensive package of bus timetables.

• During the first two phases of ITM delivery, there was, in some cases, a considerable gap between the introductory letter and the visit by the travel advisor. Experience in the field showed that the impact of the introductory letter was much greater and more positive where it was closely followed by a visit.

• A pledging system was introduced for the second phase of the project, through which individuals ‘pledged’ to undertake a certain amount of sustainable travel behaviour, for which they would receive a reward. This system has been slow to win support, in part attributed to a relative lack of ability/willingness of travel advisors to encourage people to pledge. It has subsequently been replaced by introducing a Local Motion Challenge, with a prize draw for those who participate. It is effectively the same thing, but perceived to be much less threatening. Early evidence from year 3 suggests travel advisors are comfortable with this, and all of them have offered challenges where appropriate.

• For the ITM phases already completed, where households expressed an interest in an activity that required further follow-up, the systems and lines of reporting were not as clear as they could have been, particularly for cycle training, cycle loans and car-sharing. Experience suggests that the ITM delivery team need to make it as easy as possible for households to follow up these suggestions if they are to act on them – for example, by ensuring cycle trainers get in touch with the household, rather than simply giving the household the cycle trainer contact details.
• Through the ITM project the travel advisors have collected much information on the doorstep relating to the experience of residents moving around the town. Where appropriate, these comments have been passed back to Darlington Borough Council to be acted upon. ‘There is a major opportunity here for positive PR and community involvement if comments are effectively responded to.’ The bulk of the comments fall into two categories: issues relating to buses and issues with respect to local street infrastructure. Unfortunately, despite reorganisation of the Council’s delivery mechanisms into local ‘Street Scene’ teams, there has been little flexibility in responding directly to these comments.

3.57 For each phase of the ITM programme, the delivery team and STT project manager have generally sought to work together to identify shortcomings and develop ways of overcoming them for subsequent phases.

Lessons learnt

3.58 As with ‘successes’ and ‘failures’, given the stage reached in the implementation process, it is somewhat premature to speculate on the lessons to be learnt from the ITM programme in Darlington. Nevertheless, the following observations were made by those interviewed in relation to this case study.

• There has been a very constructive working relationship between the client (Darlington Borough Council) and the delivery team (headed by Steer Davies Gleave) for the ITM programme. In the light of experience in the field, the interim survey findings and customer feedback, both parties have been prepared to listen to and, where appropriate, act on the views of the other partner. As a result, it is felt that the Darlington ITM programme has been refined and improved as it has progressed.

• The STT/ITM experience has raised awareness among other sections of Darlington Borough Council about the scope to promote sustainable transport through the local authority’s many areas of responsibility.

• In areas where ITM was accompanied by complementary community events and campaigns, such as Medal Motion in schools, awareness of and interest in the initiative was much greater than in areas where no such complementary activity took place.

• Care needs to be taken as to what messages are used to promote the objectives of the STT/ITM. As a result of its east-coast main line rail links and proximity to the A1M, Darlington has received more development pressures than other urban centres in the North East in recent years. Messages about widening accessibility and transport choice are received more favourably than talk of traffic restrictions and parking restraints.
Having comprehensive, locally relevant, baseline data is invaluable in shaping and setting robust and achievable objectives and targets. However, it is relatively costly to gather and requires ongoing (also relatively costly) monitoring to maintain its validity.

While there may be concerns about the possibility of personal travel planning being tarred with an anti-car brush, the reality from the perspective of those involved in delivering it is that there is a good deal of public support for the principle of sustainable travel.

Because ITM is relatively resource-intensive, it is advisable to concentrate on the willing, and not on the ‘hard-to-crack cases’. Anecdotal evidence suggest that, even if you do eventually get the diffident signed up to participate in ITM, they are less likely to change very much, if at all, when it comes to translating good intentions into sustainable travel patterns.

Steer Davies Gleave has carried out some of its own research on what makes ITM work. While the results of this are not yet in the public domain, one interesting initial conclusion is that it seems likely that ITM-induced change can largely be attributed to relatively few individuals making significant changes to their travel habits, rather than lots of people making incremental changes. The implications of this for ITM could be considerable, in that the process would become much more targeted and cost-effective if the ‘potential big changers’ could be identified and targeted at an early stage of the process. However, Steer Davies Gleave’s research to date also suggests that this identification process is by no means an easy task.

Other general issues

When the ITM delivery phase, managed by Steer Davies Gleave, is completed in autumn 2007, Darlington Borough Council would like to develop some level of ongoing support. Current thinking on this is focused on continuing with the Local Motion Club, providing relevant news and drip-feeding rewards to those who keep up their sustainable travel activity, via the Club newsletter. However, it is also felt that this communication channel will need to change to become more of a two-way dialogue, flow of information and ideas for improvements relating to sustainable travel in Darlington, if the interest of Club members is to be retained.

It should be possible to continue some activities, currently coordinated by the borough council, that support the ITM programme through other funding streams. For example, the school-based pedestrian and cycle training should be deliverable under the council’s road safety budget/responsibilities; school and workplace travel planning should continue via dedicated staff (who are currently part-funded from the STT budget); the website and journey planner are very useful resources, developed through the STT project, for which funding for on-going maintenance should not be difficult to argue. Darlington Information Centre (formerly the Tourist Information Centre), located in the town
centre, now stocks comprehensive public transport information, which will continue.

3.61 The database that has been developed to manage the ITM process will, when the final delivery phase is complete, include information on some 10,000 households, i.e. around a quarter of the population of Darlington. This could be developed to maintain a streamlined, yet targeted, follow-on support programme – for example, mailing relevant public transport updates to households who requested public transport information following their ‘conversation’. However, the database would need to be maintained and kept up to date for this to work in the longer term. Nevertheless, the existing database holds a wealth of useful information, currently largely accurate, which could be worked harder.

3.62 Some commentators consider that the future of ITM in Darlington is most likely to be confined to targeting delivery of information to support infrastructure and service improvements, and to people at stages of significant life change.

3.63 Exploratory work is being carried out on the possibility of securing European funding for further ITM-related work, under the transport strand of the INTEREG north-west Europe funding stream. However, for this to stand any chance of success it would need to be packaged as a completely new project, demonstrably different from the ITM delivered as part of the STT project. Ideas mooted to date include establishing a car-sharing scheme; developing bike hire; and delivering ITM to (both new and existing) Darlington residents at points of significant life-change, e.g. house/job move; starting/leaving/changing type of education; etc.

3.64 To secure longer-term, home-grown, support and resources for ITM-related activities, it will be necessary to ensure it features strongly in the next Darlington Community Plan. This is currently under preparation and will represent a strategic vision of what the priorities in the borough will be in future years, covering all policy areas. The Darlington Partnership, charged with preparing the Plan, have set up an Environment and Transport theme group to explore what the Plan’s recommendations should be on these topic areas. Simon Houldsworth, the Borough Council’s Transport Policy Manager, is the lead officer on transport, reporting to Darlington Partnership. Supported by Owen Wilson, together with other transport colleagues, he is presenting evidence on a wide range of transport measures, including Smarter Choices initiatives, to the theme group.

3.65 Similarly, Local Area Agreements are likely to cast significant influence over how local authority controlled funding is allocated in future. In fighting for funding from a general pot, ITM-type initiatives are unlikely to win against the pressures of issues such as education and primary health care (although it could be argued that sustainable transport can contribute positively to many such policy areas in the longer term). So, to ensure resources are made available for ITM, it will be necessary to ensure they are ring-fenced.
3.66 It is likely that the lessons and experiences from the STT demonstration projects in Darlington, Peterborough and Worcester will be most readily accepted as transferable to towns and cities of similar size, rather than large urban agglomerations.

3.67 Using congestion to market ITM does not wash in a town like Darlington, or indeed many areas outside the South East of England, as it is not a particularly tangible problem. In Darlington, the sustainable travel-related messages that residents are most positively responsive to relate to health, cost, quality time with friends and family, and the environment.
4. Lancashire PTP project

4.1 Interviewees:

- Howerd Booth, CIVITAS Project Manager, working for Lancashire County Council (LCC); and
- James Ryle, TravelSmart Programme Manager, working for Sustrans.

Where there is variance in the views or understanding of the two interviewees, in relation to the PTP project in Lancashire, these are reported separately.

General background

4.2 The Lancashire Personal Travel Planning (PTP) project commenced in spring 2006, and is due for completion in autumn 2008. It is part of a much broader EU-funded CIVITAS programme to promote more sustainable travel patterns in the county, which started in February 2005 and will run for four years. The CIVITAS partnership in Lancashire – comprising Preston City Council, South Ribble District Council, Preston Bus, Sustrans (initially), consultants Transport and Travel Research (TTR) as well as the county council – has been awarded £5 million for delivery of the wider programme, which includes some 26 discrete projects, including PTP.

4.3 The project is focused across two urban areas in Lancashire:

- Preston and South Ribble, which crosses the boundary between two local authority administrative areas (as shown on Figure 4.1);
- Lancaster District, which includes Morecambe and Heysham (as shown on Figure 4.2).
4.4 The Lancashire PTP programme was included as quite a small element within the initial CIVITAS project. However, reallocation of funding from other elements of CIVITAS in Lancashire, as a result of revisiting what could legitimately/expeditiously be funded under the EU project, led to a significant scaling-up of the PTP component.

4.5 The locations for programme delivery were chosen for their potential to achieve modal shift. They cover urban areas where options for using public transport, walking and cycling to serve many local journey purposes are considered relatively good.

4.6 Following a tendering process, the consultants selected to deliver the PTP programme, both the individualised marketing initiatives and evaluation surveys, were Sustrans/Socialdata. The consultants are employing the IndiMark (Individualised Marketing) technique, and the programme is branded as TravelSmart. TravelSmart has been/is being used in other locations where this consultancy team are delivering their proprietary version of PTP, yet they are also happy to operate under a locally established travel awareness campaign brand name if that is the client’s preference. Sustrans was originally a CIVITAS partner in Lancashire. However, when they bid for, and won, delivery of the PTP programme, the charity was required to relinquish this position.

4.7 The contract for delivery of the PTP programme in Lancashire requires the selected consultancy to offer personal travel information to a total of 25,000 households in each of the two study areas. In Preston and South Ribble, this is out of a total population of some 220,000. In Lancaster and Morecambe, this is out of a population of around 90,000. The programme commenced with research on existing travel behaviour patterns across the study areas, which was carried out in March and April 2006, followed by the first phase of individualised marketing in South Ribble District between May and July of the same year. The PTP fieldwork is due for completion in December 2007. The concluding evaluation surveys will take place in March/April 2008, with headline results available in July, and the full final report and presentations on findings due in September/October next year.

**Targets and objectives**

4.8 The over-arching objective of the project is for the consultancy team to offer personal travel information and advice to a target population of 25,000 households in Preston and South Ribble, and a further 25,000 in Lancaster District.

4.9 In their proposal to LCC, Sustrans and Socialdata set themselves a target of contacting at least 80% of the target population in each area (including those who decline to be involved in the programme). There are no additional specific targets for ‘positive responses/action’. Up to five attempts are made to contact the remaining circa 20%, after which the law of diminishing returns rules that further investment of time would be unprofitable. The first two stages of the TravelSmart programme have achieved contact rates of 92% and 82% respectively.
4.10 No particular modes or journey types are being targeted, nor are participants asked to reflect on whether all the trips they make are necessary. Participants are simply asked to consider any of the sustainable options – walking, cycling and public transport – for all journeys. As the Sustrans Programme Manager put it: ‘The way the programme currently operates is with a light touch – we don’t want to be seen as cajoling.’

**Sociological behavioural theories/behavioural underpinning**

4.11 The Sustrans representative indicated that the behavioural theory that probably most closely reflects the TravelSmart approach is the ‘seven stages of change’ model as applied to travel behaviour, summarised below (and further in *Making Campaigning for Smarter Choices Work*, DfT 2005).

- **Stage 1: Awareness of problem** (Aware of the issues of traffic congestion or opportunities to change modes?)
- **Stage 2: Accepting responsibility** (Accept personal/corporate responsibility or relevance?)
- **Stage 3: Perception of options** (Perception of sustainable modes?)
- **Stage 4: Evaluation of options** (Is there actually a viable alternative?)
- **Stage 5: Making a choice** (Real intent to modify behaviour?)
- **Stage 6: Experimental behaviour** (Trying out new travel choices?)
- **Stage 7: Habitual behaviour** (Long-term adoption of sustainable modes?)

4.12 The IndiMark methodology applies a segmentation approach, depending on whether a household is interested or not. Programme participants are dealt with in one of three main ways, summarised in Figure 4.3, depending on the level of interest they express in sustainable travel and to what extent that interest needs to be supported by (further) personalised information.

4.13 As an aside, the CIVITAS project manager commented that he has not been briefed on the behavioural theories underpinning IndiMark, or indeed other behavioural change methodologies, but that this would be useful in considering the viability and resource requirements for PTP in the longer term.
Figure 4.3: the IndiMark approach to PTP

Target Population

Personal contact
by phone or on the doorstep

Regular user
of sustainable modes
w/out info needs

Regular user
of sustainable modes
with info needs

Interested
In using sustainable
modes

Not interested
In using sustainable
modes

Reward only

Information pack
(+ reward for regular users)

Personal delivery

Personal delivery

Eco-driving info/
no further contact

By post

Home advice session

Evaluation
Operating structure of scheme

4.14 In general, the consultancy team prefer to focus their PTP work in areas where there is good existing, or soon to be operational, infrastructure in place to enable sustainable travel. Inevitably, this will lead to a concentration of activity in more central urban areas, as opposed to low-density suburbs and rural areas. When deciding between specific neighbourhoods, preference will be given to targeting those areas served by frequent bus services, cycle-friendly routes and a pleasant walking environment, all linked to key local services. They will also take account of any preferences expressed by the client local authority, but will seek to inform these. Account is generally not taken of car ownership levels, as it is felt this is not a good indicator of a households’ receptiveness to change. The Sustrans Programme Manager observed: ‘Some multiple-car owning households can be quite clued up on sustainable travel, and already into walking and cycling for health and environmental reasons. Meanwhile many households with only one vehicle would really welcome information on how they could use it less, or get rid of it altogether, on economic grounds.’

4.15 The residential neighbourhoods within the urban districts of central Preston (which includes areas of South Ribble), together with Lancaster and Morecambe, chosen for the PTP programme are considered to offer the greatest potential for a modal shift from the car. These are summarised below:

4.16 Preston and South Ribble:
- Area 1 (South Ribble, 10,500 households): Broad Oak, Charnock, Howick and Priory, Kingsfold, Longton and Hutton West, Middleforth, New Longton and Hutton East, Whitefield Bamber Bridge East/North/West, Coupe Green and Gregson Lane, Lostock Hall, Samlesbury and Walton, Tardy Gate, Walton-le-Dale;
- Area 2 (Preston East, 7,500 households): Brookfield, College, Deepdale, Fishwick, Garrison, Moor Park, Ribbleton, Sharoe Green, St George’s, St Matthews, Town Centre;
- Area 3 (Preston West, 7,500 households): Ashton, Cadley, Greyfriars, Ingol, Larches, Lea, Riversway, Tulketh, University.

4.17 Lancaster:
- Area 1 (Bare, Torrisholme and Skerton, 8,500 households): Bare, Halton-with-Aughton, Slyne-with-Hest, Skerton, Torrisholme;
- Area 2 (Lancaster City, 8,500 households): Bulk, Castle, Duke’s, John O’Gaunt, Scotforth, University;
- Area 3 (Morecambe and Heysham, 8,000 households): Harbour, Heysham Central/North/South, Poulton, Westgate.
● These neighbourhoods offer existing opportunities to use public transport, walking and cycling. Improvements for these modes are also being made under other components of the CIVITAS project. Many of the regular journeys people living in these areas make are, or could be, relatively short. Nevertheless, accessibility to local services varies across the study areas in Lancashire. Access from South Ribble to Preston city centre is, for example, quite significantly constrained by the River Ribble.

4.18 An outline project timetable is given in Figure 4.4.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Preston and South Ribble</th>
<th>Lancaster</th>
</tr>
</thead>
<tbody>
<tr>
<td>March–April 2006</td>
<td>Baseline research: travel behaviour and potentials</td>
<td></td>
</tr>
<tr>
<td>Spring 2006</td>
<td>Area 1 (South Ribble): –</td>
<td></td>
</tr>
<tr>
<td>Autumn 2006</td>
<td>–</td>
<td>Area 1 (Bare, Torrisholme and Skerton)</td>
</tr>
<tr>
<td>March–April 2007</td>
<td>Interim research: travel behaviour</td>
<td></td>
</tr>
<tr>
<td>Spring 2007</td>
<td>Area 2 (Preston East)</td>
<td>Area 2 (Lancaster City)</td>
</tr>
<tr>
<td>Autumn 2007</td>
<td>Area 3 (Preston West)</td>
<td>Area 3 (Morecambe and Heysham)</td>
</tr>
<tr>
<td>March–April 2008</td>
<td>Final research: travel behaviour (and potentials)</td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td>25,000 households</td>
<td>25,000 households</td>
</tr>
</tbody>
</table>

4.19 The PTP programme is being managed by Sustrans/Socialdata, with limited input from members of the CIVITAS partnership. As a significant proportion of funding for the programme is coming through the Local Transport Plan (LTP), LCC has the greatest stake in seeing it succeed, and is consequently taking the keenest interest in the delivery process – via the CIVITAS project manager. LCC is broadly happy with many elements of the operating structure. ‘The recruitment of fieldworkers and house-to-house deliveries and visits by bike are very well managed. They attract these really committed people, train them well, and keep them motivated. It provides a really good face for the Council and is the strength of their game.’ However, the CIVITAS project manager feels that the consultancy team has not been as receptive as he would like to discussing how the methodology could, in his opinion, be updated and made more economically sustainable for the longer term. ‘The paper-based delivery of information is outdated for many people, and can quickly become out-of-date. Then there is the environmental impact of all that hard copy. I’d like to explore the idea of diversifying the information delivery method to include the web and mobile phone technology. The current methodology is more contractor-friendly than consumer-friendly.’
4.20 In response, Sustrans/Socialdata argue that their experiences with delivering PTP programmes suggest that people are more responsive to personal contact, at least initially, and to some tangible information in their hand which they aren’t required to do anything too proactive to access. The Programme Manager pointed out: ‘The contract relates to the delivery of a PTP service using a proven methodology. [Nevertheless], since the contract was awarded, we have agreed numerous amendments to the project design and timetable, and have been happy to incorporate suggested additions to the methodology’. They are also of the view that many people feel bombarded with electronic information. Nevertheless, in the second phase of the Lancashire programme, and in response to aspects of the client’s concerns, recipients of travel-related information will be offered the opportunity to elect to receive updates and revisions electronically.

4.21 In brief, the current approach involves establishing a fieldwork centre for two to three months in the area that it is to receive the PTP treatment, then recruiting and training the fieldwork delivery team, which usually contains between six and ten members per segment. The targeted segment residents initially receive a letter explaining what the programme is about, to which they are not required to respond. This is closely followed by personal contact (either by phone or a ‘knock on the door’) to assess households’ willingness to participate in the programme, via a short questionnaire that respondents are ‘taken through’ by a fieldworker. Information gathered through the personal contact phase is utilised for the segmentation process (see Figure 4.3 above). The next stage of the project depends on what market segment a household has been assigned to. Existing sustainable transport users will be offered the opportunity to select a reward; a selection of those not interested will be sent information on eco-friendly driving; while those with information requirements will be offered a tailored package. The contents of this package are determined via an order form, an example of which is reproduced in Figure 4.5.
4.22 In addition to a hand-delivered pack of personalised travel information, participating households ‘with information needs’ can elect to receive a home visit to discuss in more detail their potential to make journeys by bus, on foot, or by bike. Typically no more than 5% of the target population will eventually request and receive a home visit. Those wishing to explore bus use more will get the opportunity to talk to a representative from a bus operating company and are likely to be offered
a free trial ticket for services that best suit their journey needs. Those wishing to explore the potential for cycling or walking will be offered advice about issues such as equipment, route planning, etc., and also offered an appropriate incentive (cycle computer or pedometer). These sessions are generally targeted at households with less previous experience of using the modes concerned.

4.23 The fieldworkers have found that the best times to elicit a (positive) response from households are during the afternoon and early evening. They also endeavour to avoid school holiday periods.

4.24 Sustrans organises the fieldwork delivery team, who use bikes for this work. Socialdata runs the TravelSmart call centre, which services a number of initiatives around the UK at any one time. In addition, the LCC-employed CIVITAS project manager spends ‘a small amount of time’ on the PTP programme, but has 25 other initiatives to oversee. The other significant human resource requirement is from the LCC information and marketing team, which contributes five staff members during the fieldwork activity phases. During the course of the project these staff will devote approximately 20–25% of their time per annum to the PTP programme.

4.25 Appointed fieldwork and call-centre staff receive training for their specific area of work. There are no particular qualifications needed, save an ability to communicate well and, for the fieldworkers, a willingness to ‘pound’ unfamiliar streets, sometimes after dark and in poor weather conditions. Fieldwork offices are generally open for a 12-week period, so the fieldworkers are generally given short-term contracts. Where possible, Sustrans likes to ‘recycle’ trained fieldworkers for subsequent delivery phases.

Marketing and promotion

4.26 Generally, Sustrans advises clients to avoid too much in the way of preliminary marketing or media work specifically in relation to an upcoming PTP programme, as a poor reaction (generated by an ill-informed and unsympathetic local councillor or newspaper) can result in things getting off on the wrong foot. However, what has been used to good effect in Lancashire were the results of the preliminary travel behaviour research, using headline messages such as: ‘Half of local journeys by car in Lancashire could be made by alternative means’; or ‘Of all the alternatives available, cycling offers the greatest potential for replacing car trips’.

4.27 In areas where there is an established and well-known travel awareness campaign, and the local authority’s relationship with local press is positive in relation to this campaign, then some ‘warm-up’ publicity in advance of the roll-out of a PTP programme may be considered.

4.28 Once a programme is under way, Sustrans does run information and awareness-raising seminars for local councillors and other interested bodies.
4.29 Sustrans is responsible for co-ordinating the assembly of information, such as leaflets, timetables and guides, to support the PTP programme. Many of these are provided by LCC’s information and marketing team. Examples are shown in Figure 4.6.

Figure 4.6: Marketing and promotional materials provided for the project
4.30 The Sustrans/Socialdata approach to PTP involves undertaking an audit of relevant supporting information already available and working with the client to identify and fill gaps. As part of the programme in Lancashire, for example, TravelSmart maps have been produced for all of the target areas, combining information on public transport, walking and cycling opportunities. The Bamber Bridge example is reproduced in Figure 4.7.

4.31 In addition to the marketing materials, rewards are offered to programme respondents who indicate they already use sustainable travel options and don’t require further personalised information, to reward them for good behaviour and to encourage them to continue with this. There is a choice of two rewards: an alarm clock or a pen. Incentives are also used to entice programme participants with information requirements to trial public transport (a free weekly ticket), walking (a pedometer) or cycling (a cycling computer) and to encourage them to return their order forms.

**Funding**

4.32 The project is part-funded under the EU CIVITAS programme, with the balance predominantly from the LTP. Letting the contract to a consultant has enabled ‘capitalised’ LTP funding to be used. The human resources devoted to the project from the LCC information and marketing team are an additional revenue cost that is being absorbed by the local authority.
Costs

4.33 Sustrans/Socialdata were awarded a £1.2 million contract for the delivery of the PTP programme in Lancashire. Of this, €843,000 (around £550,000) comes from the EU CIVITAS budget, and the remainder from the LTP. The contract budget is divided as follows:

- TravelSmart: £1,025,000
- Research and evaluation: £165,500

Integration with other transport-related initiatives/projects

4.34 The PTP programme in Preston has been scheduled to take advantage of the development of a new Orbital bus network, and in Lancaster there has been close integration (e.g. timetabling and promotion of local initiatives, as well as co-branding) with the city’s Cycling Development Town (CDT) project. Otherwise the PTP programme is not overtly tied into the wider sustainable transport improvements being carried out in the target areas, either under the CIVITAS project, the LTP, or other funding streams. However, as physical improvements come on stream, information about them is being utilised within the PTP programme.

Evaluation

4.35 The evaluation (which is separate from the ‘IndiMark’ programme) is being undertaken by Sustrans/Socialdata under the project contract in three tranches:

- baseline research on travel behaviour and the potential for modal shift (March and April 2006);
- interim research on travel behaviour in those areas where the PTP programme has been delivered (March and April 2007);
- final research on all areas in which the PTP programme has been delivered (March and April 2008).

4.36 In each of the two main project areas (Preston and South Ribble; and Lancaster), the total samples for the evaluation surveys are as follows:

- baseline: 1,500 respondents (i.e. a larger number will be approached, but with some non-respondents);
- interim: 750 respondents;
- final: 1,500 respondents.

4.37 In all cases, two-thirds of these samples are drawn from the target group and one-third from a control group. The travel behaviour surveys involve completion of one-day travel diaries (with all seven days covered across the survey population) to ascertain travel behaviour change amongst both groups. Further evaluation will be undertaken through analysis of corroborative data, relating to bus patronage, car usage and levels of walking and cycling across the cities.
4.38 It is recognised that the evaluation needs to be detached from the marketing and information provision phases. To this end, the monitoring surveys comprise a simple letter from the local authority, not from the consultants, arriving several months after the PTP programme has been delivered, advising households they have been selected for inclusion in a travel survey and requesting they return the requisite travel diary information by post.

4.39 A summary of the level and nature of involvement in the two completed TravelSmart segments in Lancashire is given in Figures 4.8 and 4.9.

Figure 4.8: Summary of involvement in TravelSmart in Preston and South Ribble Area 1

<table>
<thead>
<tr>
<th>Responses to TravelSmart (1)</th>
<th>South Ribble – Spring 2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total target population:</td>
<td>10,713 households</td>
</tr>
<tr>
<td>Contacted:</td>
<td>9,812 households 92%</td>
</tr>
<tr>
<td>'R without' 907 households</td>
<td>9%</td>
</tr>
<tr>
<td>'R with' 1,218 households</td>
<td>12%</td>
</tr>
<tr>
<td>'I' 4,781 households</td>
<td>49%</td>
</tr>
<tr>
<td>'N' 2,906 households</td>
<td>30%</td>
</tr>
<tr>
<td>Reward 437 households</td>
<td></td>
</tr>
<tr>
<td>Information/reward 3,860</td>
<td></td>
</tr>
<tr>
<td>Eco-driving info 2,600</td>
<td></td>
</tr>
<tr>
<td>Further services 216 home</td>
<td></td>
</tr>
</tbody>
</table>
Impact and effectiveness

4.40 The results from Travel Behaviour Research Baseline Survey 2006 are available on the Sustrans website (under ‘TravelSmart’, then ‘Travel Behaviour Research and Evaluation’). The key findings relating to the potential for modal shift to more sustainable travel modes are summarised below and in Figure 4.10:

- Currently around a third of all trips are made by sustainable modes (30% in Preston/South Ribble and 39% in Lancaster/Morecambe).
- The remaining trips are made by motorised private transport (motorbike, car driver or passenger), but there is potential to change this situation.
- For 8% of all trips in Preston/South Ribble and 5% in Lancaster/Morecambe, there is no potential to switch to sustainable travel modes because of objective constraints (e.g. luggage, health reasons, age, need to carry multiple passengers).
- In another 34% of all trips in Preston/South Ribble and 30% in Lancaster/Morecambe, there is no adequate alternative available to travel by more sustainable means. This could be due to reasons such
as the lack of an adequate public transport connection, no bicycle being available, or the journey distance being too far (for cycling or walking).

- This leaves more than a quarter of all trips (28% in Preston/South Ribble and 26% in Lancaster/Morecambe) that are currently made by car or motorbike in situations where the individual has only subjective reasons against walking, cycling and public transport. In theory, these car trips are capable of being switched to more sustainable modes, simply by providing better information on the alternatives, or improving people’s perceptions of travel time, costs, comfort or infrastructure. This represents the potential for ‘soft’ measures or Smarter Choices to change travel behaviour.

- The most ready potential for increased use of sustainable travel modes exists in those trips that are made by car in situations where the individual has no objective or identifiable subjective reasons against one or more of the alternatives. The largest incidence of these unexploited ‘free of choice’ trips occurs in the case of cycling, which currently captures less than one tenth of the available potential. Even for public transport, the potential ‘free of choice’ trips not currently made by this mode represent half of the current mode share (8%). Although walking currently captures the majority of the available ‘free of choice’ trips, successfully exploiting the remainder would increase the mode share of walking from 25% to 30% across the survey area.

Figure 4.10: Potential use of sustainable travel modes in the Lancashire PTP research areas

<table>
<thead>
<tr>
<th>Constraints</th>
<th>Preston/ South Ribble</th>
<th>Lancaster/ Morecambe</th>
</tr>
</thead>
<tbody>
<tr>
<td>No adequate alternative</td>
<td>34</td>
<td>30</td>
</tr>
<tr>
<td>Only subjective reasons against STM</td>
<td>28</td>
<td>26</td>
</tr>
<tr>
<td>Actual usage (walking, bicycle, public transport)</td>
<td>7</td>
<td>5</td>
</tr>
</tbody>
</table>
4.41 Headline results from the interim research on travel behaviour in those areas where the PTP programme has been delivered, carried out during March–April 2007, are available.

4.42 The findings of the final reporting stage, involving all areas in Lancashire where the PTP programme has been delivered, are likely to be available during autumn 2008.

Successes and failures

4.43 As the programme is still in the process of delivery, and this process is only about half way to completion, identifying robust ‘successes’ and ‘failures’ would be premature. However, the following interim thoughts from the interviewees are worthy of consideration.

Successes

- The Sustrans delivery team manager on the ground works part-time on this project, and part-time on other sustainable travel related projects in Lancashire for the county council. As such, he is very well placed in terms of picking up information of relevance to the TravelSmart programme, as well as liaising with colleagues and project partners.

- Delivery (on time and on budget) of a TravelSmart programme to a total target population of over 18,000 households.

- High participation rates at each stage of the process, with documented evidence of high levels of customer satisfaction.

- The quality and positive presentation of the field staff and fieldwork undertaken by Sustrans with households has had a very good public reaction and is considered to reflect well on the county council.

Failures/shortcomings

- The timing of delivery of PTP programmes could/should be more closely tied into the launch of improvements for sustainable modes that serve the target area. This is particularly important for suburban and rural areas, where the existing offer is relatively poor.

- The contract does not allow for the client to request a modification of approach to take account of emerging ideas and better practice in the delivery of PTP programmes (although this view is not wholly accepted by Sustrans, see quote under Operating Structure of the Scheme above).

- The most frequently expressed discontent from programme participants is that they, occasionally, receive unnecessary and/or duplicate information by first-class post: ‘What a waste of taxpayers’ money’. However, the number of complaints is low in relation to the total number of households contacted.
• From the delivery team’s perspective, there have been frustrations about having updated public transport information ready in time for inclusion in the home delivery of personalised travel information packs. However, this problem is not unique to Lancashire.

• Getting public transport operators signed up to support the programme has also been somewhat problematic – again, a problem not confined to Lancashire. Typically, public transport operators are initially wary of the time and resources they fear the project will consume, particularly when it comes to the issues of free trial tickets, and persuading them of the merits of personalised home visits to potential customers.

• Another common problem relating to public transport operators is that their marketing strategies can be poor, and, in times of financial squeeze, this invariably seems to be the first budget to be cut.

• In Lancashire there are numerous bus companies. This has complicated the process of deciding what would be the most appropriate free trial bus tickets to use.

• In relation to home visits, which typically involve 2–5% of the target population, there are occasions when the household requesting the visit fails to honour the arrangement, i.e. is out when the pre-arranged visit is made.

Lessons learned

4.44 As with ‘successes’ and ‘failures’, given the stage reached in the implementation process, it is somewhat premature to speculate on the lessons to be learnt from the CIVITAS PTP programme in Lancashire. Nevertheless, the following observations were made by those interviewed in relation to this case study.

• The evaluation of PTP programmes should be separated from the delivery in terms of the organisations charged with carrying them out. Otherwise the delivery agents effectively become ‘judge and jury in their own trial’. In response to this, Sustrans pointed out that: ‘The contract let by LCC was for personalised travel planning AND behavioural research. Our proposal went to great lengths to set out how these two activities would be independent of each other. This included provision for an independent audit of the survey methodology and analysis as part of the contract.’

• Projects with a relatively long delivery timetable, stretching over several years, should allow for periodic reviews of their effectiveness and an ability for the client to request reasonable modifications to take account of emerging technologies and methodologies that are likely to enhance the effectiveness that the current model.
Other general issues

4.45 The CIVITAS project manager indicated that it was very unlikely that LCC would continue to fund the implementation of PTP, following the same Sustrans/Socialdata format, once the current programme is complete and a more automated delivery would be pursued.

4.46 The Sustrans/Socialdata format is considered too resource-intensive. The CIVITAS project manager does, however, think there is scope for a more targeted, less human-resource-intensive approach, utilising electronic information delivery methods to a much greater extent, and funded from a combination of the LTP, as well as developer contributions and employers through travel planning. To this end, he would like to see some investment in a ‘smarter’ version of Transport Direct, one that does not rely on the provision of origin and destination data, but could include suggestions about how trip purposes might otherwise be met, particularly if the only/most attractive option for the identified journey appears to be the car. For example, if an enquirer selected information on accessing an edge-of-town supermarket that is difficult to reach other than by car, they would be provided, in addition to information about getting to the specified destination by sustainable means, with alternative ideas for obtaining their groceries, such as making use of local shops, home delivery services, etc.

4.47 The client project manager commented that he considers the current dominance of the market for delivery of PTP programmes in the UK by a very limited number of consultants to be undesirable. It is not only uncompetitive, but has resulted in a very formulaic approach which is out-moded, doesn’t take account of how the majority now like to access information, is wasteful of paper and unsustainable for the majority of cash-strapped local authorities. He would like to see more consultancies being drawn in, and encouragement to trial new technology, with a movement away from the ‘one-size-fits-all’ methodology. In addition, he feels there is a need for longer-term evaluation of PTP programmes to gauge whether their initial effects are sustained.
5. Bristol PTP scheme

5.1 Interviewee

- Mike Ginger (Bristol City Council).

Introduction

5.2 A face-to-face interview was conducted with Mike Ginger, Coordinator – Special Projects Team, at Bristol City Council’s Transport Planning department.

5.3 Bristol City Council was an early adopter of Personalised Travel Planning (PTP) techniques. It was able to use temporary additional funding from the European Union VIVALDI programme to secure the services of VIVALDI partners Sustrans and Socialdata to undertake a trial PTP programme in 2002 and 2003; and two further programmes in 2004 and 2005.

5.4 When VIVALDI concluded, the council adopted an annual tendering process to secure PTP services. Consultants Steer Davies Gleave (SDG) were appointed to run further PTP interventions, known as Travel Easton and Travel Clifton and Cotham, in 2005 and 2006. This Case Studies report refers exclusively to these later PTP programmes in Bristol. The VIVALDI and TravelSmart projects’ findings are summarised in the Main Report.

5.5 In 2007, the council has tendered for a further year, but has invited bidders to consider the implications of a three-year PTP programme.

5.6 The 2007 PTP programme tender asks the contractor to make a PTP intervention in one new neighbourhood each year, with 2,000–3,000 people to be reached in each area. The tender specification requires there must be a minimum of 2,000 conversations. A successful conversation is where one resource is provided as a result. The council expects that the contractor may need to contact around 5,000 households in order to achieve this conversation rate.

5.7 The Bristol PTPs provided by Steer Davies Gleave have included a wide range of options aimed at helping drivers reduce the emission levels from their vehicles. This approach has been adopted to help reduce emission levels in air quality management areas. These included checking vehicle emission levels, green driver training sessions, information about ways to reduce driving costs and emissions, and gifts of tyre pressure gauges.

5.8 The Bristol PTP team are building up experience of working on PTP projects in areas that are very different socially. They are starting to develop ideas for adopting different approaches to meet the needs of local areas – not only in terms of the types of information they offer, but also in the approach they take.
General background

5.9 The two projects completed since 2005 are Travel Easton and Travel Clifton and Cotham. Travel Easton took place in 2005/06. Travel Clifton and Cotham took place from August to November 2006.

5.10 In 2007/08, the area that has been chosen is Fishponds.

5.11 The interim and final findings for Travel Easton are now available. Interim findings are also available for Travel Clifton and Cotham.

5.12 Easton was chosen as a target area because of a combination of factors:

- its location, beside the M32, together with the effects of emissions generated on local roads, make its air quality poor;
- whilst having relatively low car ownership compared with Bristol as a whole, its car fleet is comparatively old, with the consequence that average pollution per vehicle kilometre is probably higher than average;
- Easton has considerable parking problems and some congestion problems in certain locations, with car ownership growing quickly;
- public transport in the area, whilst it has some pronounced weaknesses, is reasonably good; and
- there are good local services and cycling infrastructure.

5.13 Clifton and Cotham was chosen as a target area, because there is good local access to bus and rail services and the contrast it would provide to the Easton area targeted in the previous year.

5.14 Table 5.1 shows the similarities and differences between the two target areas.
<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Travel Easton</th>
<th>Travel Clifton and Cotham</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Statistically an area with high levels of deprivation.</td>
<td>Affluent area. Not a great sense of the living environment deprivation or crime identified in the census.</td>
</tr>
<tr>
<td>Air quality</td>
<td>Close to M32; perception of poor air quality, though some felt it was better than other parts of Bristol they knew.</td>
<td>While still in the Air Quality Management Area, air quality not seen as a problem by most residents contacted.</td>
</tr>
<tr>
<td>Households</td>
<td>Typically one household per housing unit, though some shared occupiers. Terrace houses in compact streets.</td>
<td>A mix of large houses split into multiple small flats with sole or shared occupiers, often students, or medium/ large family homes in leafy streets.</td>
</tr>
<tr>
<td>Inhabitants</td>
<td>High proportion of Black and minority ethnic groups (BME) residents; huge mix of social groups and professional activities.</td>
<td>Mostly white residents, many professionals. Some work from home. Many students.</td>
</tr>
<tr>
<td>Local groups</td>
<td>Very many groups serving the community and including the BME community. Strong sense of community in the area.</td>
<td>Groups centred on the traditional networks of church, residents’ associations/ neighbourhood watch and playgroups. But general sense that residents ‘live their own lives’, i.e. community spirit not as strongly identifiable as Easton.</td>
</tr>
<tr>
<td>Local amenities</td>
<td>St Mark’s Road and Stapleton Road provide for most needs, with corner shops ‘dotted’ around the qarea. But more limited range when compared to Whiteladies Road.</td>
<td>Whiteladies Road offers supermarket and high street multiples meeting all needs, sometimes at a price.</td>
</tr>
</tbody>
</table>
5.15 Bristol City Council estimates that the total population of Bristol in mid-2005 was 398,300. In Bristol the average household consists of 2.5 persons, so the number of households in Bristol is approximately 159,320. The households completed in the Travel Easton and Travel Clifton and Cotham projects represent just under 5% of the Bristol population. Table 5.2 gives more detail on the response from the targeted households.

### Table 5.1: Characteristics of project locations in Bristol continued

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Travel Easton</th>
<th>Travel Clifton and Cotham</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parking</td>
<td>Streets lined with parked cars. Few opportunities for off-street parking.</td>
<td>Streets also lined with parked cars, though some residences had off-street parking. Perception that it is not possible to park near Whiteladies Road: if you move your car, you will lose your space.</td>
</tr>
<tr>
<td>Public transport</td>
<td>This was felt to be reasonably good in Easton.</td>
<td>Whiteladies Road is a main artery for many bus routes.</td>
</tr>
<tr>
<td>Experience of external interventions</td>
<td>Has benefited from various regeneration initiatives in the past</td>
<td>Little, possibly no, experience of external intervention in the past.</td>
</tr>
</tbody>
</table>

### Table 5.2: Population characteristics of two areas

<table>
<thead>
<tr>
<th>Key household data</th>
<th>Travel Clifton Cotham</th>
<th>Travel Easton</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total households targeted</td>
<td>5,629</td>
<td>3,469</td>
</tr>
<tr>
<td>Total households completed</td>
<td>4,461</td>
<td>3,315</td>
</tr>
<tr>
<td>Total households reached</td>
<td>2,917</td>
<td>2,112</td>
</tr>
<tr>
<td>Participating individuals</td>
<td>2,070</td>
<td>1,602</td>
</tr>
<tr>
<td>Participating households</td>
<td>1,667</td>
<td>1,538</td>
</tr>
<tr>
<td>Non-participating households</td>
<td>1,250</td>
<td>574</td>
</tr>
<tr>
<td>Not contacted (four unsuccessful attempts)</td>
<td>1,202</td>
<td>508</td>
</tr>
<tr>
<td>Not home (i.e. in receipt of end-of-project note)</td>
<td>342</td>
<td>695</td>
</tr>
<tr>
<td>Listed incorrectly</td>
<td>1,168</td>
<td>154</td>
</tr>
</tbody>
</table>

9 The project ended before four knocks had been attempted with all ‘live’ households. Such households received an end of project note.
5.16 In Clifton there are a large number of student dwellings where each student may have individual travel needs, whilst in Easton, where households were mostly composed of families or couples, the travel needs of the household were mostly shared. In Easton 1.04 individuals per household became participants or requested one or more resources, whilst in Clifton and Cotham the rate was 1.24 individuals per household.

5.17 There were also differences in non-participation rates. For example, the percentage of four unsuccessful visits (where no one came to the door) is very high in Clifton at 21% of households contacted (27% of completed) compared to 15% in Easton. Having identified that daytime contact was yielding poor results in Clifton, the focus on first knocks was shifted to evening and weekend calls as far as possible, in an effort to find people at home. Table 5.3 gives a breakdown of reasons for non-participation in the project.

<table>
<thead>
<tr>
<th>Key household data</th>
<th>Travel Clifton</th>
<th>Travel Cotham</th>
<th>Travel Easton</th>
</tr>
</thead>
<tbody>
<tr>
<td>No suitable resource</td>
<td>57</td>
<td>204</td>
<td></td>
</tr>
<tr>
<td>Does not support project</td>
<td>115</td>
<td>169</td>
<td></td>
</tr>
<tr>
<td>Four unsuccessful visits</td>
<td>508</td>
<td>1,202</td>
<td></td>
</tr>
<tr>
<td>Low-impact conversation</td>
<td>120</td>
<td>73</td>
<td></td>
</tr>
<tr>
<td>No reason given</td>
<td>81</td>
<td>307</td>
<td></td>
</tr>
<tr>
<td>Slammed door</td>
<td>63</td>
<td>133</td>
<td></td>
</tr>
<tr>
<td>Already travels sustainably</td>
<td>12</td>
<td>138</td>
<td></td>
</tr>
<tr>
<td>High-impact conversation</td>
<td>10</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>116</td>
<td>205</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,082</strong></td>
<td><strong>2,452</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Targets and objectives

5.18 The specific objectives of the Easton scheme were:
- a 10% reduction in car driver trips;
- to engage a least 200 car drivers in the process of improving driving style and vehicle maintenance;
- to recruit 30 new members to the City Car Club Scheme.

5.19 The specific objectives of Travel Clifton and Cotham were to:
- reduce car driver trips in line with existing experience;
- improve air quality through improved driver practices.
5.20 The primary target was to see a 10% reduction in car driver trips in the study area. In terms of volume, the target was to obtain 2,000 participants (individuals who requested one or more resources following contact with an advisor).

Strategies for improving air quality

5.21 The strategies developed for Easton were revised for Clifton and Cotham. The following materials were retained:

- the Cut Your Car Costs booklet developed for Easton was revised and made generic for Bristol by the Council;
- Car Club membership was promoted with the offer of free membership for three months, and membership combined with other offers;
- eco-driving training was promoted, but residents were left to make their own arrangements;
- similarly, emissions testing was promoted with two ‘drop-in’ days advertised.

Sociological behavioural theories/behavioural underpinning

5.22 The Bristol PTP programme is based on sociological theories of changing behavioural norms, by providing information and stimulating discussion about sustainable travel, air quality impacts, costs and other impacts of individual travel behaviour in the targeted areas.

5.23 However, the approach is a pragmatic one. The council officer’s aspiration is to provide PTP advice in every area in Bristol on a rolling programme over time. Areas are targeted where there are improvements to public transport and cycling infrastructure, and so on. This ensures that any synergies between the benefits of new ‘hard transport measures’ and ‘soft measures’ are maximised.

5.24 The Bristol approach has purposefully included a range of measures that car drivers can adopt to reduce their impact on the environment, thereby actively including them as part of the PTP intervention, even if they cannot or will not move towards more sustainable modes. This ensures that they can become part of the solution and does not exclude them from participating in further activities later down the line. It provides a starting point on the continuum of change that allows them to be included within the intervention. This helps to ensure that PTP is understood and supported by a higher proportion of the local population and becomes a normal and accepted activity.

5.25 An additional benefit is that individuals who travel predominantly by car are more easily engaged in the ‘conversation’, which becomes more extensive for car users than it would in earlier PTP interventions, where they may well have felt defensive and ‘on the back foot’. It is interesting to speculate whether this makes committed car drivers more likely to ask for information about non-car modes and to view that information in a more open-minded way.
There were definite observed differences in the responses from individuals in the two different catchment areas. Intuitively the team thought that it would be more difficult to get a favourable response in Easton. There are relatively high levels of deprivation in the area, characterised by lower-income households with less access to a car, so it was felt that local residents may therefore have more pressing priorities than the environment. The fact that the responses were higher than anticipated has been partly attributed to the communities having good social capital.

However, it proved far more difficult to develop ‘conversations’ with individuals in Clifton and Cotham. This is an area where people live a more ‘privatised lifestyle’. Some resented the information-giving at the door, seeing it as patronising. There was a higher proportion who preferred to get information electronically from the web as and when they needed it.

The contrasts in the responses in the two different areas indicate that there is a need to look at appropriate materials and delivery mechanisms for materials that suit the social make-up of the target areas.

This experience may also suggest that, in order to harness the ‘social norm’ mechanism for those in more affluent areas where there is less ‘social capital’, sense of neighbourhood or community, it might be more fruitful to concentrate PTP programmes through workplaces, social networks and schools, where there is more social interaction.

### Operating structure of scheme

The council tries to go for areas where there is already a good level of travel choices. Accessibility planning techniques, using Accession software, are deployed to check if the PTP areas have good levels of accessibility. The current PTP area, Fishponds, is also where the council is undertaking some intensive school travel planning work in local primary schools.

The approach being adopted recognises that one conversation with one person in the household may lead to the material or message being cascaded to the rest of the household, but does not assume this will always be the case.

The contractor (Steer Davies Gleave) notifies people that the PTP intervention is happening. This includes actions to build awareness, such as local events, to let people know that it is going on. Following an introductory letter, up to four door-to-door calls are made, after which, if there is still no contact, some contact material is left behind.

A local base is rented. Local people are recruited, who attend a three-day training course prior to commencement. The council has sent some of its staff on the course and found this beneficial.
5.34 The council has observed quite how determined the travel advisors are about making the contacts, including working evenings and weekends. This approach does not include setting up a call centre, although residents can telephone the local office.

5.35 The council has been impressed at the way well-motivated people have been recruited, who present well. However, there has to date been no uniform or corporate dress code. One is being introduced for the 2007 Fishponds PTP intervention.

5.36 Generally, the idea is to try to work with the social capital of the area.

5.37 Each travel advisor carries a laminated letter saying that the work is being carried out on behalf of the council. The general experience is that this is perceived as a legitimate door knock, with residents feeling that it is not going to cost them anything and there is no risk attached to taking part.

5.38 The nature of the conversation is firstly to identify the motivations of the individual, e.g. health, saving time, and so on; only then, do the travel advisors move on to what materials should be provided. The materials are provided afterwards within a few days of the contact taking place.

5.39 The whole intervention takes two to four months, and the aim is to choose a time of year with reasonable weather.

5.40 Within the council, there is a Team Manager, Smarter Choices Team, in the Transport Planning department. Some long-term vacancies are about to be filled, which should lead to a team with about 5.4 full-time equivalent staff. The team is responsible for travel plans, sustainable travel events, ‘smarter choices’ promotional and campaign work, the PTP programme, promotion of car sharing, car clubs, and so on.

5.41 The travel advisor teams were recruited by Steer Davies Gleave. Some of the travel advisors trained for the Easton project were recruited again to work on the Clifton and Cotham project, providing continuity and experience for the second PTP intervention.

5.42 The approach to PTP in the two areas changed to meet the requirements of the project area. For example, in Easton there was greater concentration on contacts through existing community groups and networks, as well as schools and health centres, because of the high levels of community activity in the Easton area. This area has high levels of bonding social capital, where individuals support and work with other members of their own community.

5.43 Clifton and Cotham is an area where there is less community interaction, and the project there concentrated more firmly on intervention at the household and individual level, with community contact restricted to schools and health centres.
Marketing and promotion

5.44 The Communications Team at Bristol City Council handled all contact with the wider Bristol media, and two photo opportunities were staged, namely:

- the launch of Travel Easton featured in the *Bristol Evening Post*, 23 January 2006; and
- an event held on 18 March featured in the *Bristol Evening Post* of 24 March, 2006.

5.45 All available opportunities were taken to feature in newsletters produced by community groups where publication fell in the project period. These included:

- *Easton Residents Network*, vol. 1, issue 1, 2006;
- Castle Green United Reformed Church newsletter, Jan 2006;
- *Aware*, Neighbourhood Watch newsletter, Jan 2006;
- Asian Arts Newsletter, February 2006, issue 18;

5.46 Travel Easton was also featured in the council’s own newsletter to Bristol residents in February/March 2006, reporting on general awareness raising in Easton, including the following street events:

- Saturday 14 January, St Marks Rd Area: Church Avenue street stall, balloons and gazebo to raise profile of project, hand out general flyers;
- Saturday 28 January, Stapleton Rd outside Kensington Baptist Church: street stall and balloons as above;
- Saturday 18 February, Easton Community Centre: Dr Bike 1;
- Saturday 4 March, St Marks Road Area: Church Avenue: VOSA emissions testing, eco-driving, Car Club Car, Dr Bike 2, information stall and balloons;
- Saturday 11 March, Easton ‘Lego’ church Dr Bike 3;
- Saturday 18 March, Stapleton Road/Kensington Park: VOSA emissions testing, eco-driving, Car Club Car, Wacky Bikes, Dr Bike 4, information stall and balloons, entertainment;
- Saturday 25 March, Easton Community Centre: Dr Bike 5.

5.47 Table 5.4 shows materials available in Easton before the project and those developed for the project.
Table 5.4: List of materials used in Easton

<table>
<thead>
<tr>
<th>General materials already available in Bristol</th>
</tr>
</thead>
<tbody>
<tr>
<td>For disabled people</td>
</tr>
<tr>
<td>• Bristol and Bath Railway Path Access Guide BCC</td>
</tr>
<tr>
<td>• Bristol and Bath Railway Path Access map BCC</td>
</tr>
<tr>
<td>• Bristol Dial-a-Ride BCC</td>
</tr>
<tr>
<td>• Bristol Shopmobility BCC</td>
</tr>
<tr>
<td>Buses</td>
</tr>
<tr>
<td>• First timetables: 4/4a; 6/6a; 7; 24/25; 36/36a; 41/42/43; 44/45; 48/49, First</td>
</tr>
<tr>
<td>• other timetables: 500; 585/586, BCC</td>
</tr>
<tr>
<td>• Usbus: linking the inner city, Bristol CT</td>
</tr>
<tr>
<td>• Greater Bristol Travel Map 2005/06, BCC/First/SGC</td>
</tr>
<tr>
<td>Health</td>
</tr>
<tr>
<td>• Introducing the Health Matters project, Bristol Dial-a-Ride</td>
</tr>
<tr>
<td>Driving</td>
</tr>
<tr>
<td>• car share ‘credit card’, BCC</td>
</tr>
<tr>
<td>• 'switch off' stickers, BCC</td>
</tr>
<tr>
<td>• motorcycle and scooter parking, BCC</td>
</tr>
<tr>
<td>Walking</td>
</tr>
<tr>
<td>• Easton Healthy Walking Group leaflets, BCC (Health Walks team)</td>
</tr>
<tr>
<td>• Countryside Walks Provided by BCC</td>
</tr>
<tr>
<td>Cycling</td>
</tr>
<tr>
<td>• Bristol: A map for cyclists, BCC</td>
</tr>
<tr>
<td>• Inner Bristol Cycle Map, BCC</td>
</tr>
<tr>
<td>• Wheels of Change Lifecycle UK Cycle Advice Leaflets: maintenance, children, security, right bike, conditions, sharing your route, finding your way, clothes, BCC</td>
</tr>
<tr>
<td>Rail</td>
</tr>
<tr>
<td>• Commuting with Wessex Trains Bristol Area, Wessex Trains</td>
</tr>
<tr>
<td>• Rover and Ranger Tickets in the south west, Wessex Trains</td>
</tr>
<tr>
<td>• South Coast to Bristol and South Wales, Wessex Trains</td>
</tr>
<tr>
<td>• First Great Western Guide to Rail Services, First</td>
</tr>
<tr>
<td>Ferry</td>
</tr>
<tr>
<td>• Ferry information and timetables</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>• Travel blending material, SDG</td>
</tr>
</tbody>
</table>
Table 5.4: List of materials used in Easton continued

<table>
<thead>
<tr>
<th>Specific materials developed for the project</th>
<th>Details</th>
</tr>
</thead>
</table>
| **General**                                 | • Project flyer for stakeholders. Introduction, before start of intervention  
• Project flyer for community groups. Introduction, before start of intervention  
• Project flyer for general use. Used once project up and running: street events, groups, shop windows, library, health centres |
| **Map**                                     | • A3 Easton Travel Map. An existing map was modified to cover the project area in full for use as PTP resource |
| **Buses**                                   | • Summary of First bus fares |
| **Driving**                                 | • *Cut Your Car Costs* booklet for use as PTP resource;  
• *Cutting your car costs* – how are you getting on? |
| **Rail**                                    | • Local train from Stapleton Rd – the timetable was extracted from the Wessex Trains timetable and a special sheet produced |
| **Other**                                   | • Personal Journey Plans (PJPs) for use as PTP resource  
• resource list, left with households after four unsuccessful door-knocking attempts  
• balloons – white with red Travel Easton logo  
• PTP intervention letters/communications with residents – for example, congratulations letter sent to people already traveling sustainably |
The team looks at the impact and assesses the effectiveness of marketing materials used in each PTP intervention in the interim report. This allows them to make changes to the materials in light of the experience of the travel advisors and PTP participants. Table 5.5 shows the assessment of the resources used in Easton.

<table>
<thead>
<tr>
<th>Incentive/resource</th>
<th>Impact</th>
<th>Doing it differently</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bus</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30 taster bus tickets</td>
<td>Tickets were often requested but selectively given out.</td>
<td>It would be interesting to follow up the recipients for their experiences, if time permitted.</td>
</tr>
<tr>
<td>Bus inspector visits</td>
<td>No interest in Bus inspector visit, even though this would have been an opportunity for community groups. Perhaps lack of interest due to unpopularity of bus company.</td>
<td>Work more closely with bus co. but unlikely to be fruitful given poor support received from bus company in this project.</td>
</tr>
<tr>
<td>Usbus map/info</td>
<td>Very popular and has had impact.</td>
<td>No change. Illustrates value of promotion.</td>
</tr>
<tr>
<td>Bus maps timetables</td>
<td>Very popular.</td>
<td>More support from bus company welcomed, especially in relation to fare structures.</td>
</tr>
<tr>
<td><strong>Cycling</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cycle training</td>
<td>Provided an unexpected opportunity for social inclusion, as 54% of those interested were from black and ethnic minority groups.</td>
<td>Social inclusion aspect will depend on project area demography.</td>
</tr>
<tr>
<td>Dr Bike workshop</td>
<td>Very popular, but can be difficult to distinguish between those who would have had maintenance done anyway and those not.</td>
<td>Specific follow-up of recipients could be of value.</td>
</tr>
<tr>
<td>Cycle maps</td>
<td>Very popular.</td>
<td>Retain.</td>
</tr>
<tr>
<td>Cycle info leaflets</td>
<td>Popularity may vary according to area.</td>
<td>Retain.</td>
</tr>
</tbody>
</table>
### Table 5.5: Impacts and potential modifications incentives and resources in Easton continued

<table>
<thead>
<tr>
<th>Incentive/resource</th>
<th>Impact</th>
<th>Doing it differently</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lower emissions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eco-driving lessons</td>
<td>Reason for lack of interest not clear, possibly length of lesson or people protective about their driving skills!</td>
<td>How best to 'market' this incentive needs to be reviewed.</td>
</tr>
<tr>
<td>On-street emissions testing</td>
<td>Very noisy, need a separate area from any event taking place!</td>
<td>Worth repeating.</td>
</tr>
<tr>
<td>Tyre pressure gauge</td>
<td>Expensive item.</td>
<td>Not essential, but a good option as a straightforward incentive that links directly to driving more efficiently.</td>
</tr>
<tr>
<td>City Car Club membership</td>
<td>Slower uptake than expected, but understandable.</td>
<td>Definitely worth repeating, but amend process to make administration less onerous on project. Expect a longer time-lag for uptake.</td>
</tr>
<tr>
<td>Crystal Clear Advice on Cutting Your Car Costs</td>
<td>Very popular resource.</td>
<td>Retain.</td>
</tr>
<tr>
<td>Cutting car costs – self-monitoring sheet</td>
<td>741 sent out.</td>
<td>Only two sheets returned so far suggests that few will take time/trouble to complete form.</td>
</tr>
<tr>
<td><strong>Walking</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pedometer</td>
<td>Successful resource.</td>
<td>Retain.</td>
</tr>
<tr>
<td>Countryside walks</td>
<td>Popular.</td>
<td>Could develop this, though more recreational than mode-changing; hope is that it make walking more acceptable and thus leads to mode shift later.</td>
</tr>
<tr>
<td><strong>Rail</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local train information</td>
<td>Successful resource.</td>
<td>Retain.</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Easton area-specific travel map</td>
<td>Very successful.</td>
<td>Retain.</td>
</tr>
<tr>
<td>Dial-a-Ride and Shopmobility</td>
<td>Valued by the minority who could use.</td>
<td>Would be good if there was more info to offer to disabled.</td>
</tr>
<tr>
<td>Covering letter when enclosing resources</td>
<td>May be unnecessary.</td>
<td>Sticker on folder would be simpler.</td>
</tr>
<tr>
<td>Resource list</td>
<td>Use could be extended beyond fourth knock enquiries.</td>
<td>Retain.</td>
</tr>
</tbody>
</table>
Incentives are being used, but not as free gifts. Instead, they are tied in with overcoming a specific barrier to a resident making a change in their travel behaviour or tackling a specific problem. The emphasis is on people’s needs rather than a general marketing approach. Table 5.6 shows the incentives used in Easton.

<table>
<thead>
<tr>
<th>Incentive/resource</th>
<th>Description</th>
<th>Uptake</th>
<th>Cost to project</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bus</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taster bus tickets</td>
<td>First suggested provision of 30 bus ‘taster’ tickets (but to non- or irregular bus users, not existing customers).</td>
<td>30 tickets</td>
<td>£0</td>
</tr>
<tr>
<td>inspector visits</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Cycling</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cycle training</td>
<td>10 to be delivered by BCC and 10 to be delivered by Travel Easton @ £25 per session.</td>
<td>13</td>
<td>£250 (estimated)</td>
</tr>
<tr>
<td>Dr Bike workshop</td>
<td>5 @ £200 (2-hr session with two mechanics).</td>
<td>74 people attended</td>
<td>£1000</td>
</tr>
<tr>
<td><strong>Lower emissions</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eco-driving lessons</td>
<td>35 one-hour lessons @ £22 per hour, offered free to pairs of people for 1h or £13.50 for solo.</td>
<td>4</td>
<td>£770</td>
</tr>
<tr>
<td>On-street emissions testing undertaken by VOSA at two street-based events.</td>
<td>29 requested a slot, 10 attended.</td>
<td>£0</td>
<td>£0</td>
</tr>
<tr>
<td>Garage tune-ups</td>
<td>10 ‘tunes’ @ £18.50 per half hour (at Hinton Motor Services in study area).</td>
<td>All allocated but only 3 used</td>
<td>£57.50</td>
</tr>
<tr>
<td>Tyre pressure gauge</td>
<td>30 gauge sets @ £12 per set.</td>
<td>30</td>
<td>£360</td>
</tr>
<tr>
<td>City Car Club membership</td>
<td>10 free memberships plus 20 discounted memberships to be provided. £100 deposit to be covered by BCC/City Car Club.</td>
<td>5 signed but not activated</td>
<td>£0</td>
</tr>
<tr>
<td><strong>Walking</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pedometer</td>
<td>100 @ £2 (these were branded ‘Travel Easton’).</td>
<td>93</td>
<td>£200</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>259 individual incentives taken up</td>
<td>£2,638</td>
</tr>
</tbody>
</table>
Media interest

5.50 Traditionally, the local newspapers have reserved the right to be critical of the council on some transport issues. A positive full-page feature appeared in the 27 September 2006 edition of the *Bristol Evening Post*. Entitled ‘Right at your door – it’s the travel doctor’, the piece was accurate about the aims of the PTP intervention and was accompanied by a photograph of a cheerful travel advisor at the door of a local resident.

5.51 In the same edition of the newspaper, there was a very negative editorial describing the PTP intervention as ‘a barmy idea’ and ‘an utter waste of money’.

Figure 5.1: Example marketing material used in Bristol

Funding

Current funding streams

5.52 The council is making a firm commitment to PTP. But, owing to funding constraints, only one small PTP intervention is being made each year, costing around £70,000, with 10% of the budget set aside for monitoring. It is recognised that this is making it difficult to achieve any economies of scale.

5.53 The funding is from the council's capital programme, predominantly from the Local Transport Plan, but also from the council's own resources. The fight for funds is fiercely competitive, so it is considered to be an achievement to have been able to secure this support for a PTP
programme. The total integrated transport capital programme is currently £6.9m (after maintenance has been taken out), with about £240,000 for the ‘smarter choices’ activities. This represents about 3.5% of the total budget, meaning the PTP budget is approximately 1% of total capital spend.

Costs

5.54 Bristol City Council officers would like to get away from securing the PTP interventions on an annual tender basis and move towards issuing a three-year contract. This would enable the council to build in more monitoring.

5.55 Officers would be pleased to see some independently-derived cost comparisons being made available, perhaps by this study: How much does it cost to take 1,000 vehicle kilometres out of the network? This would enable a PTP programme to be then compared with other methods of achieving the same result. Intuitively, the officers suspect that PTP could emerge from such a comparison very favourably. At present, it is felt that vehicle kilometres travelled/mileage reduction figures are not being prepared accurately.

Integration with other transport related initiatives/projects

5.56 The council would like to be able to produce stop-specific bus timetables. But it is experiencing both funding problems with its Omnibus software and lacks the staff with the requisite skills and time available.

5.57 The council aims to integrate PTP interventions with improvements to public transport infrastructure, cycling infrastructure, area-based work on school travel plans and air quality management area initiatives. The aim of this integration is to maximise the effectiveness of changes, so that the combined ‘hard’ and ‘soft’ measures approach ensures increased awareness and maximum utilisation of the combined investment.

Evaluation

5.58 Officers are acutely aware of the high costs of monitoring on some PTP programmes. The initial foray into PTP by the council with TravelSmart had monitoring built in but was also funded externally by the EU VIVALDI programme.

5.59 The council accepted the results of this programme but, when it came to establishing its own PTP programme after VIVALDI, the decision was to take what is perceived to be a small risk and put less PTP budget into the evaluation and the collection of ‘before’ and ‘after’ data.

5.60 Therefore, officers are clear that it cannot be said that the current approach it is adopting is providing statistically significant data. The travel diary approach is resulting in about 100 residents providing travel diaries. About half of those drop out when the contractor returns for the ‘after’ results.
5.61 A final report is published about one year after the PTP intervention.

5.62 The customer services surveys in Easton were taken by approximately 90 people. The results of this are shown in Tables 5.7 and 5.8.

### Table 5.7: Customer satisfaction results

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Achieved in Travel Easton (%)</th>
<th>Achieved in Travel Clifton and Cotham (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of participants who rate customer service as good/ very good</td>
<td>95</td>
<td>89</td>
</tr>
<tr>
<td>Percentage who rate customer service as very good</td>
<td>60</td>
<td>50</td>
</tr>
<tr>
<td>Percentage of participants who rate the quality of travel information as good/ very good</td>
<td>89</td>
<td>66</td>
</tr>
<tr>
<td>Percentage who rated travel information as very good</td>
<td>62</td>
<td>38</td>
</tr>
<tr>
<td>Percentage of participants who felt they had been given as much information as they wanted</td>
<td>89</td>
<td>Not asked</td>
</tr>
<tr>
<td>Percentage of those who had contacted the TE office themselves and had been satisfied with the way their query had been handled.</td>
<td>100</td>
<td>Not asked</td>
</tr>
</tbody>
</table>

### Table 5.8: Interim results

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Achieved in Travel Easton (%)</th>
<th>Achieved in Travel Clifton and Cotham (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of participating households who have made a change in their travel patterns</td>
<td>31</td>
<td>41</td>
</tr>
<tr>
<td>Percentage of participating households whose accompanying comments show a definite and potentially long term change away from car use (included in % above)</td>
<td>14</td>
<td>18</td>
</tr>
</tbody>
</table>
Car Club take-up

5.63 The target for new memberships of City Car Club was 30. Actual take-up has been slower than anticipated, but for understandable reasons. It may be that people are waiting for an MOT failure, or simply that the concept was unfamiliar (which it plainly was to many householders). Joining a car club is very much the kind of ‘jump’ that accompanies other significant changes, such as no longer needing to make a particular regular trip. Aware of this, City Car Club has agreed to extend the deadline for take-up, and it will be interesting to note what happens in the coming months. At present, five people have gone through the membership process, but none of them has activated their free three-month membership. The reasons for this are varied: two people were waiting to get rid of their car, and one person was deciding whether or not to include their partner on their account.

5.64 Beyond the leaflet information on the subject that was sent on request, the subject of City Car Club and its benefits will have been discussed with many other people, sowing the seeds that may result in change in the future. Some time after the PTP intervention concluded, City Car Club reported increases in membership in Easton, some of which it was felt could be attributed to the PTP work. To capitalise on PTP interventions, the Car Club should consider some promotional activity or advertising in the area over the following 12 months or so. It is already well understood that the switch from personal car ownership to car club membership has a long gestation time.

Driving style

5.65 Recognising the impact that vehicles have on air quality, the project brief set an additional target of engaging 200 drivers to improve their driving style. Bristol City Council and Steer Davies Gleave discussed the question of how this should be measured. In any case, it is worth noting that the Crystal Clear Advice to Cut your Car Costs booklet was requested by 521 participants. The customer survey suggests that there has been a distinct change in driving styles on the part of many participants.

5.66 The qualitative information from the Clifton and Cotham interim survey shows that individuals have made changes to their travel habits as a result of the information they have received as part of the project. As the area does have a very ‘privatised lifestyle’ generally, it will be interesting to see if changes made by individuals have a knock-on effect to local social norms. However, they may help to change the ‘social norms’ of other groups that these individuals belong to in Bristol area, for example friends, contacts through leisure pursuits and work colleagues.
Final survey: Easton Area

5.67 The Easton area final survey has been completed, and an example of the survey can be seen in Appendix 5A.

5.68 The ‘before’ travel diary survey of 54 people had a 59% response rate (32 respondents). Eight of these participated in the project.

5.69 The ‘before’ and ‘after’ travel diary data was deemed unsuitable for measuring the effectiveness of the PTP intervention. As a result, a supporting survey was sent out to all participants, at the same time as the diary, to boost the number of respondents: 1,555 surveys were sent out and 262 responses were received. An example of the supporting survey can be seen in Appendix 5B.

5.70 This survey showed that 40.2% of responding car drivers think they have reduced the number of car trips they make since the PTP intervention; 38.5% report an increase in rail use and 40.9% report an increase in bus use. For sustainable modes, 46.7% report an increase in walking journeys and 39.5% of cyclists reported an increase in cycling.

Impact and effectiveness

5.71 The council considers it is getting positive results from PTP, and it is now being rolled out gradually across the city, year by year.

5.72 The face-to-face contact is generally seen as an intrinsically positive activity, with many residents quite pleasantly surprised it is happening, given that it is being driven forward by the council.

5.73 Table 5.9 shows the distribution of resource requests in Easton.

<table>
<thead>
<tr>
<th>Area of activity</th>
<th>Type of resource</th>
<th>Proportion of total requests (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encouraging bus use</td>
<td>Bus timetables and fare information; bus map.</td>
<td>31</td>
</tr>
<tr>
<td>Encouraging cycling</td>
<td>Cycle maps; information on incentives; advice leaflets.</td>
<td>20</td>
</tr>
<tr>
<td>Encouraging lower emissions</td>
<td>Cutting your car costs booklet; info. on Car Club, car share, eco-driving, emissions testing, tune-ups, tyre pressure gauge. Booklet single most popular item.</td>
<td>18</td>
</tr>
<tr>
<td>Encouraging walking</td>
<td>Maps and healthy walks info.</td>
<td>10</td>
</tr>
<tr>
<td>Encouraging rail use</td>
<td>Local train timetable and others.</td>
<td>10</td>
</tr>
<tr>
<td>Other</td>
<td>Easton area map (5%), ferry info, “switch off” stickers etc.</td>
<td>11</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>
Successes and failures

5.74 Officers are interested in using PTP in an imaginative manner. For instance, the Smarter Choices Team makes PTP-type interventions at the local university fresher fairs and other major events, to catch students new to the city before they have made their travel choices.

5.75 Overall, the council is making solid progress with its PTP programme. This may be lacking in scale, but it has the merit of being an accepted part of the implementation of the Local Transport Plan. PTP is being used with confidence in Bristol.

5.76 The low level of involvement in earlier PTP interventions by First Bus and other bus operators in the city is disappointing, but a greater involvement was provided during Travel Clifton and Cotham. The struggle by the council to keep all travel information up to date is but one manifestation of the lack of engagement by the bus operator with the Smarter Choices agenda.

5.77 Looking ahead, the council is contemplating how PTP can be used to greater effect. Bristol has looked at providing PTP interventions based upon people moving house, but the take-up was low. The current PTP delivery arrangement, and the one that is likely to remain in place for at least the next 12 months, is not providing the council and its Smarter Choices Team with a full-time permanent local resource upon which it can call as and when opportunities arise. This may mean that residential travel plans at new developments will not be able to use PTP interventions as effectively as might be desired.

Lessons learned

5.78 The door-knocking effort required in areas with multi-occupancy dwellings, in order to reach the same conversations target, is significantly greater.

5.79 In the current funding environment, there is a straightforward trade-off between making contact with residents and monitoring. In Bristol City Council’s case, the officers estimate they would need to sacrifice about 500–600 conversations (i.e. about 25% of the target) in order to have more thorough monitoring.

5.80 Officers are concerned about how the council can go about insisting on PTP being included as a planning condition in residential travel plans at new developments. Part of the problem is delivery. When new residential units are ready for their first occupants, the council needs to be able to provide the PTP intervention, but it is currently very difficult to turn PTP services on and off like a tap. The council would like to be able to call on a provider that could meet this requirement.
5.81 It is seen as difficult to specify how the residential travel plan should be delivered in advance of the development taking place. In turn, this conundrum loops back to the issue of evaluation and monitoring. The council needs to be able to provide developers (and development control officers) with convincing arguments for PTP interventions, backed by evidence.

5.82 Officers are considering the merits of providing the PTP programme in-house, but there are large institutional barriers to this working effectively, including similar difficulties over hiring temporary staff experienced at other councils.

5.83 The role played by the VIVALDI programme and the initial EU funding was critical in helping to kick-start the process. After that, champions were required to keep up the momentum, and currently PTP is being institutionalised or embedded thanks to the creation of the council’s Smarter Choices team.
Appendix 5A: Travel Easton survey

Last year, Bristol City Council conducted a survey asking their travel survey. Thank you for your support to help make this survey work. We will be running the survey again this year for new and existing users. We are pleased to announce that we have released a new, improved version of the survey. The feedback from this survey is an important part of informing the process of travel planning in the city of Bristol.

What do we want you to do?

- Please answer all relevant questions to help us understand the needs of the area.
- Please note that the questions are based on your travel experience.
- If you have any questions, please leave us a note or email.

If you have any questions...

Please feel free to contact us at any time. We are always here to help you make the most of your travel experience in Bristol.
5. Bristol PTP scheme

<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data 1</td>
<td>Data 2</td>
<td>Data 3</td>
</tr>
<tr>
<td>Data 4</td>
<td>Data 5</td>
<td>Data 6</td>
</tr>
<tr>
<td>Data 7</td>
<td>Data 8</td>
<td>Data 9</td>
</tr>
</tbody>
</table>

The table above illustrates the data distribution for the Bristol PTP scheme.
About your travel

This form should be completed by the same person who has filled in the Travel Diary.

Please tell us how often you typically travel in the following ways:

<table>
<thead>
<tr>
<th>Mode</th>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
<th>Yearly</th>
</tr>
</thead>
<tbody>
<tr>
<td>On foot</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By bicycle</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By motorized wheel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By car (as driver)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By car (as passenger)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By truck</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By train</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By sea</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Do you have a full driving licence? [ ] Yes [ ] No
Do you hold a Blue European Parking Badge? [ ] Yes [ ] No
Do you have a concessionary travel pass? [ ] Yes [ ] No

Thank you for completing the questionnaire. If you have any comments, please write them in the space below:

Further Comments:

If you have lost the reply-paid envelope, you can return it to the following address. You do not need a stamp:

Department for Transport
MAKETRAVEL (TP2216)
2P-3X Upper Ground
London
SE1 1PA

Thank you for completing this questionnaire.
Appendix 5B: Supporting survey

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5. Bristol PTP scheme
6. Brighton and Hove PTP scheme

6.1 Interviewees:
- Stuart Croucher (Brighton and Hove City Council);
- Dean Spears (Brighton and Hove City Council);
- Charlotte Welch (Brighton and Hove City Council).

General background

6.2 Brighton and Hove City Council (B&HCC) was awarded Cycling Demonstration Town (CDT) status in October 2005, attracting a Department for Transport funding grant of £1.5 million over three years (£500,000 per year, beginning in 2006), administered by Cycling England and matched by the city council. The city council’s activities were noted in the context of the CDT project by the Chief Executive of Cycling England in the Cycling England Annual Report (2005/06, p6): ‘The Project will demonstrate to Government and local authorities how investment in our towns and cities to levels only seen in successful European cycling towns can significantly increase levels of cycling, with all the associated benefits from reduced congestion to a more physically active population.’

6.3 Personalised travel planning (PTP) in Brighton and Hove is being run as an initiative under the CDT project to increase and promote cycling in the city and also promote other sustainable forms of transport, for example walking and public transport. Each PTP area targeted receives a package of cycle engineering measures approximately a year before the PTP campaign is launched there. The broad approach to PTP in Brighton and Hove can be summarised as the process of activating or incentivising the population that lives near to an existing or new sustainable transport facility/engineering measure.

6.4 However, before B&HCC was awarded CDT status it was already planning to implement a PTP programme. The CDT status allowed B&HCC to implement a larger project reaching more of the population. Cycling England funds approximately one-third of the PTP project, with the remaining funding being provided through the Local Transport Plan and Brighton and Hove revenue budgets.

6.5 The council launched a PTP programme known as ‘Your Journey’ in 2006. ‘Your Journey’ forms part of the city council’s sustainable transport campaign ‘JourneyOn’, which provides promotional incentives by supporting national and local events and through the provision of an online city-wide journey planner www.journeyon.co.uk. The PTP programme will run until 2009. B&HCC contacted 10,000 households in 2006 in north west Hove, involving North Portslade ward (in its entirety), Hangleton and Knoll ward (west), and South Portslade ward (north). B&HCC intends to contact about 10,000 households per year (typically incorporating some 25,000 people) completing in 2009. Figure 6.1 indicates when different areas of the city will be targeted.
Therefore the PTP project will target 100,000 of the 150,000 people who live within the CDT area (to the west of the city). Approximately 250,000 people live within the local authority area.

The PTP project is managed by B&HCC, although the training advisors are employed through consultants Steer Davies Gleave (SDG) who also undertake some of the travel advisor training. The Brighton and Hove PTP model ensures that the city council runs the strategic and day-to-day PTP operations and policies, with ‘pockets of expertise’ brought in as required to provide a project continuum. This model allows the city council to maintain flexibility with the promotional and engineering incentives offered.

**Targets and objectives**

The main objective of the PTP programme is to achieve long-term, measurable, modal shift amongst the residents of the target area (Black, 2006) by providing a range of incentives and information, so that individuals can make their own decisions about the transport solutions that they wish to pursue.

B&HCC officers hope that the PTP intervention will help them to meet directly at least two of their LTP2 targets:

- to increase cycling trips – the target is a 5% year-on-year growth in usage on existing sections of the cycle network. The baseline is 4,146 trips (2003/04) and the target is 5,833 trips in 2010/11;
- to increase the level of walking – the target is a 10% increase in pedestrian movement levels by 2010/11. The baseline is 37,770 trips (2002/03) and the target is 41,547 by 2010/11;
- to reduce congestion within the city – the target is a 5% decrease in motor vehicle trips by 2010/11.
6.10 Although the PTP programme is being undertaken within the framework of the CDT project, cycling is not the only targeted mode of transport, with people being encouraged to walk, cycle and use public transport more. There is, however, a strong cycling offer, reflecting the incorporation of Cycling England expertise.

**Sociological behavioural theories/behavioural underpinning**

6.11 No sociological behavioural theories have been adopted or considered. However, thought was given to the contemporary discourse centred around cognitive dissonance within psychological research. Cognitive dissonance is a psychological phenomenon which refers to the discomfort felt at a discrepancy between what an individual already knows or believes in, and the relationship with new information or interpretation. This theory is particularly apposite with PTP. Specifically, beside attitudes, the key to lasting voluntary behaviour change is to focus on what people value. It was from this type of thinking that it quickly became apparent that there are different ways available to understand people’s motivations, from looking at objective issues like journey times to considering how people ‘feel’ about using their car. At the doorstep, these areas can be probed poignantly by discussing individuals’ experiences of using a particular transport mode throughout their daily life. For example, when a travel interviewer promises to deliver an information pack, it will help to encourage the householder to hear themselves promising to look through it when it’s delivered. In doing so, there is a greater likelihood that they will follow through and use it (Bardoe, 2007 in an internal SDG publication).

6.12 However, after the 2006 PTP intervention, B&HCC commissioned Dr Paula Black of Sussex University to undertake ‘Personalised Travel Planning travel behaviour interviews’ (PTP10). The study was started in October 2006, with 25 interviews taking place between November and December 2006, and a final report produced in February 2007. The interviews were held with people who had participated in the PTP intervention during 2006, who were asked questions relating to ‘travel behaviour prior to PTP intervention; travel behaviour since PTP intervention; key motivators for change; experience of change; key barriers to change; wider impacts. The interviewee was also asked specifically about positive impacts of the travel advisor visit, and allowed to add anything not raised during the interview which was of importance to them’. (Black, 2006, Appendix 2).

6.13 B&HCC has also been approached by a PhD student who is researching the reasons why people do not take up offers of free gifts and incentives.
Operating structure of scheme

Project process

6.14 The PTP intervention areas were carefully selected using many different methods. As Brighton has CDT status, the PTP areas were chosen in consultation with Cycling England. The broad approach has been to link PTP campaigns to new and existing infrastructure. In Year 1, infrastructure improvements are made in an area of the city as part of the CDT work; then in Year 2 (i.e. the next financial year) a PTP campaign is launched in that area to make residents and people working in the area more aware of the improvements and encourage and incentivise their use.

6.15 B&HCC has also used social profiling methods to select their PTP areas. A MOSAIC analysis of the whole area was conducted, and ACORN groups, combined with Census based profiling, were examined, in order to target fruitful areas for PTP. Ten social stratifications were used in the MOSAIC analysis including:

- symbols of success;
- happy families;
- suburban comfort;
- ties of community;
- urban intelligence;
- welfare borderline;
- municipal dependency;
- blue-collar enterprise;
- twilight subsistence;
- grey perspective.

6.16 These methods have been supported with various GIS maps observing general accessibility and indices of multiple deprivation across the city. The ‘JourneyOn’ team also conducted site visits across the city assisted by SDG.

6.17 The method of contact used is door knocking. The travel advisors work together in teams of three, which ensures their safety as well as improving visibility of the project. The travel advisors are advised not to enter people’s houses unless perhaps the weather is particularly bad and only if they are invited in. Each household in the targeted area is visited at least once by travel advisors and, if no contact is made, then return visits are made. If a household is not contactable after three or four visits, then a postcard is left at the household asking the occupier(s) to contact the travel advisor. Overall only 200 households were not contacted face to face.
6.18 The travel advisors engaged in a conversation with the remaining 9,800 households, asking people about their travel habits and attitudes and emphasising how sustainable modes can save time and money, help to improve people’s health and help them do their personal bit for the environment. The environmental element was kept to a minimum, with the focus being on people’s carbon footprint. If households were interested in PTP, then the travel advisors offered the occupiers a bespoke set of materials and incentives. The materials requested were delivered to participants by post within a maximum of ten working days.

Staff

6.19 B&HCC made a conscious decision not to hire transport consultants to do all of the work for the council and the CDT project. This decision led to a very large learning curve and a lot of hard work for the council officers, but all of the information and knowledge gained will remain afterwards, so it is considered that the exercise has been well worth it. However, they did hire consultants (Steer Davies Gleave) prior to the recruitment of the PTP officers in order that preparatory work on the project could commence.

6.20 The council team is ‘organic’ in nature. Some members of the team had not previously worked in transport (for example, one officer’s background was in customer service), but the newer staff have had a positive influence on many of the existing staff. A new approach to working has developed amongst the staff: they are keen to learn, to push the boundaries back and to try more radical measures and solutions to delivering sustainable travel. This approach has been facilitated and fostered by the newer team members.

6.21 Much of the earlier mentoring was provided by Dean Spears and the consultants. Dean is a Principal Transport Planner at the city council, who is experienced in developing travel plans, particularly school and workplace travel plans, together with engineering infrastructure to encourage travel behaviour change. This approach has developed the model of providing engineering and promotional incentives together, to activate the local population.

6.22 Of particular note is a training session run by the consultants to help the new local authority officers understand their new briefs when they first started in their new positions.

6.23 Recruitment of the personalised travel planning officers took an extraordinary amount of time because the job descriptions for the posts were unique and very different from the preceding transport-planning-type roles. The consultant team prepared the travel advisor job descriptions and stated that ‘no previous experience’ in PTP was required, as PTP and the job of a travel advisor are both relatively new.
6.24 In 2006, once the PTP staff were in post (the individuals who coordinate the project on a day-to-day basis), the travel advisors (those who conduct the doorstep interviews) were recruited through community networks. The job description asked for people who are creative, enthusiastic individuals with a degree as a minimum requirement or good experience. An example of the job description is found in Appendix 6A.

6.25 For the 2007 campaign, B&HCC will recruit six travel advisors and two resource assistants. The travel advisors will work day, evening and weekend shifts (at least three evening shifts per week and every other Saturday). Learning from their experience last year, the officers will ask travel advisors working on a Saturday to work at community events instead of door knocking. The travel advisors earn £8 per hour and the resource assistants earn £6.50 per hour.

6.26 Two council officers share the managerial and organisational tasks between them and are managed by a Principal Transport Planner who in turn project-manages the CDT project. They are especially busy in the immediate run-up to the travel advisors being hired and during the PTP intervention. An extra person on the council team, perhaps working part-time, would help immensely. The council PTP team, the travel advisors and resource assistants have the use of one large room in the council offices, and the travel advisors are given mobile phones by B&HCC. Specific IT equipment was purchased (a server with password protection) on which to store all the PTP programme data.

6.27 The travel advisors and resource assistants are not employed by the council, as it proved impractical to find a way to hire temporary staff whilst remaining within official procedures. Instead, in each year of the programme to date, the travel advisors have been employed by external consultants (SDG). As planned, the support and mentoring to the PTP officers from SDG reduced in the second year, but there was still a need to retain SDG to recruit, train and employ the travel advisors. Training in the second year has been a joint effort, with SDG designing the overall programme and providing specific input on the conversation training. The remainder of the training has been devised by, and will be delivered by, B&HCC. All of the training is carried out in one week, and the travel advisors cover the 10,000 households over the next 13 weeks. Refresher training sessions take place once a month, and the travel advisors can discuss any issues arising on a one-to-one basis with a PTP officer. If a travel advisor finds something is really working well or is having trouble engaging with households, then they pair up to assist each other.
Marketing and promotion

6.28 High-quality promotional materials have been developed for the PTP programme, with all creative work undertaken in house. The majority of the content has been new, the only existing information to be used being bus timetables. As it happens, the latter happen to be produced to a very high standard, with the local bus company (Brighton & Hove, part of the Go Ahead Group) winning bus marketing awards. The information that participants choose to receive is presented in a branded folder.

6.29 B&HCC offered, and will continue to offer, a range of incentives, many of which required negotiation with local businesses. For example, in order to provide potential participants with a cycling incentive, officers met with 17 local, independent cycle traders to discuss any offers of discounts. Eventually a handful of traders approached B&HCC and a 20% discount voucher for cycle purchases was agreed with one trader.

6.30 B&HCC has decided not to give rewards to people travelling sustainably already and to focus instead on incentivising people to change their travel behaviour. A range of incentives was designed to encourage people to participate including:

- 20% discount on a cycle purchase;
- 10 free three monthly passes (donated by Brighton & Hove Bus and Coach Company);
- 1,500 day tickets and 750 one week tickets (sold by the bus company to B&HCC at a discount).

6.31 For the 2007 PTP project, B&HCC has made one fundamental development: in addition to offering a PTP package to all residents within the area, 100 people will be selected at the doorstep to form part of an intensive group, who will each receive a unique tailored package of £270 each for whatever they need to get them cycling, for example. Travel Advisors work with local cycle retailers and go with the individual cyclist to local bike shops to offer a continuum of support. These people will be identified by the Travel Advisors at the doorstep. A unique monitoring package, comprising travel diaries, will provide the opportunity to monitor carefully the impact of being part of this intensive group. A bespoke financial monitoring methodology has been developed to monitor resources carefully.

6.32 The PTP team has also made sure the PTP intervention ties in with national events (such as car-free day in 2006), and has staffed stalls at local events (such as weekend community festivals) where some of the daily and weekly bus tickets were given away (the remainder being given away on the doorstep). Indeed, the start of the 2007 PTP intervention coincided with Bike Week, where several hundred local cyclists and ‘passers-by’, received free Doctor Bike checks, complimentary breakfasts and a range of sponsored travel information and incentives: for example, free trouser clips, pumps, and foot lotion sponsored by the Body Shop Foundation.
Doctor Bike sessions have also proved very popular. B&HCC has organised a sustainable transport triathlon for summer 2007.

Carefully selected billboards around the city have been used successfully to market sustainable transport modes, especially cycling, and one particular location has achieved considerable media coverage. The billboard is located next to an at-grade railway crossing, where car drivers have to queue at the barriers to let the trains through.

At least one person has written into the local newspaper, *The Argus*, with a positive opinion. Their letter appeared at the head of the Letters page, with the text superimposed on a photo of the billboard: ‘My bike makes me feel better. I was inspired by this poster, which I saw whilst sitting in my car outside Portslade station last week. It simply points out how much better we would all be if we got ‘on our bikes’ around town. I’ve done exactly that and can’t begin to explain how much better I feel (and slightly richer through saving on petrol and parking).’ Other billboard adverts have compared the cost of the car compared to a cycle. In fact, comparative costs are a main theme of the PTP campaign. Figure 6.3 shows an example of a promotional billboard.
B&HCC has used a range of media to market the PTP programme, including local newspapers, radio stations, a community newspaper, a student newspaper, lifestyle magazines and even doctors' surgeries newsletters and public health promotional literature. The officers have made sure that the B&HCC press officer is thoroughly engaged in the programme.

Another successful initiative has been the launch of the JourneyOn website (www.journeyon.co.uk), the council's own online journey planner for the four main modes of walking, cycling, public transport and car. The website calculates the number of calories burnt per journey entered according to the mode, provides the weather forecast and contains features such as online blogs from local people taking up the sustainable transport challenge. The council is continually looking at ways to improve the site, by asking local people for suggestions (such as advice on any walking/cycling short cuts they know). The website covers the entire city and includes all transport modes. Local residents can participate through innovative means such as regular 'blogging' competitions. Local colleges supplied short films to deliver the sustainable transport message in an innovative manner.
Funding

6.39 The current funding streams are from the CDT project and the council’s Local Transport Plan (LTP) funds (both revenue and capital). Funds from the council comprise:

- revenue from decriminalised parking from 2005/06, carried over to 2006/07;
- £80,000 per annum from LTP2 funding to 2010/11.

6.40 The CDT funding of £1.5 million is awarded in three equal sums over the three-year period to 2008/09, and is match funded by the council. 2009 is officially the year of walking and cycling, and during this year approximately 40% of the entire capital budget will be spent.

6.41 B&HCC would like to continue the PTP programme after the CDT project has finished. B&HCC is already a member of the European Union’s CIVITAS consortium and is hoping to obtain EU funding to take the PTP programme forward. The council is also able to commit approximately £20,000 from LTP2 funding and £80,000 revenue from decriminalised parking enforcement in future years.

6.42 B&HCC have not developed a business case for the PTP programme yet, as they need to receive the results from the evaluation survey being undertaken by Social Research Associates (SRA). However, there are performance indicator documents with some details that could help to establish a business case.

Costs

6.43 B&HCC has provided a detailed breakdown of the costs of the PTP programme (past, present and future), shown in Table 6.1.

<table>
<thead>
<tr>
<th>PTP Year</th>
<th>CDT Funding</th>
<th>B&amp;HCC funding</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTP Year 1</td>
<td>£54,388</td>
<td>£167,011</td>
<td>£221,399</td>
</tr>
<tr>
<td>PTP Year 2</td>
<td>£54,388</td>
<td>£108,677</td>
<td>£163,065</td>
</tr>
<tr>
<td>PTP Year 3</td>
<td>£47,632</td>
<td>£95,264</td>
<td>£142,896</td>
</tr>
<tr>
<td>Total</td>
<td>£156,408</td>
<td>£370,952</td>
<td>£527,360</td>
</tr>
</tbody>
</table>

6.44 Table 6.2 shows the project headline costs for the first two years of the Brighton PTP programme, excluding B&HCC employed project coordinators (figures correct at 13th July 2007).
### Table 6.2: Costs of PTP project elements

<table>
<thead>
<tr>
<th>Year</th>
<th>Total budget</th>
<th>£167,011.00</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Incentives</td>
<td>Promotional incentives distributed at doorsteps and at events, including bike discount vouchers, cycle computers, bells, snap bands, pedometers.</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>Design and printing of travel information for the project, including four leaflets made for the project.</td>
</tr>
<tr>
<td></td>
<td>Consultancy start-up costs</td>
<td>Including database and professional support.</td>
</tr>
<tr>
<td></td>
<td>Travel advisor salaries</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Monitoring</td>
<td>Baseline survey of 2,000 households, PTP10 social research interviews.</td>
</tr>
<tr>
<td></td>
<td>Publicity and marketing</td>
<td>Billboard design and space hire and adverts in local publications.</td>
</tr>
<tr>
<td></td>
<td>Direct costs</td>
<td>Postage, uniforms, office equipment.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year 2</th>
<th>Total budget</th>
<th>£163,065.00</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Incentives</td>
<td>To include working with 100 people intensively to encourage cycling.</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>Design and printing of travel information to be branded with transport campaign.</td>
</tr>
<tr>
<td></td>
<td>Consultancy start-up costs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Travel advisor salaries</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Monitoring</td>
<td>Baseline survey of 2,000 households and follow-up survey from Year 1 of 2,000 households.</td>
</tr>
<tr>
<td></td>
<td>Publicity and marketing</td>
<td>Billboards, adverts in local newspapers.</td>
</tr>
<tr>
<td></td>
<td>Direct costs</td>
<td>Uniforms, database.</td>
</tr>
</tbody>
</table>
Integration with other transport-related initiatives/projects

6.45 Although the PTP programme is part of the CDT project, it has far wider impacts on other modes of sustainable transport.

6.46 As stated before, the council is implementing walking and cycling infrastructure in areas where it wishes to run a PTP campaign approximately a year after the infrastructure and improvements have been implemented. B&HCC is installing infrastructure at the high-quality level normally only seen in key mainland European cities and investing similar amounts of money as many mainland European neighbours do, in the hope of achieving European levels of cycling (see Figure 6.4). Examples of infrastructure and engineering measures include improvements to NCN Regional Route 82, which will bring European high-quality cycle freeways to the area, increased secure cycle parking and implementation of at least 85 individually designed ‘advance stop’ lines at 28 junctions throughout the city between November 2006 and March 2007.

Figure 6.4: Brighton design

6.47 There is also a local Bike It project in Brighton & Hove. The Bike It officer is funded by the bicycle industry levy on new bicycle purchases. B&HCC provides the budget for engineering measures, including cycle parking, promotional maps and materials and running events. In addition, Gary works intensively with ten schools per year.
6.48 In July 2004, Brighton and Hove was designated as a ‘Healthy City’ by the World Health Organisation, acknowledging the city’s strong political commitment to reducing health inequalities and improving everyone’s health. One of the many projects is the Health Referral Project, which includes a nurse explaining different travel options and their respective health benefits to referred patients. To support this initiative, B&HCC has taken out adverts in a doctor’s newsletter and in health-promoting magazines, using material similar to that placed on the billboards mentioned earlier.

6.49 Another element of the CDT work is business travel planning. B&HCC’s workplace travel planner has funding to work with the 35 top employers in Brighton, including both universities, Legal and General, American Express and Lloyds TSB.

6.50 One major project ties in with the PTP programme. This is the design and implementation of the New Road Urban Realm. A prime city centre street has been radically redesigned and re-engineered, with a £1.4 million budget, so it is now a shared surface street operating one way for motorists and both ways for cyclists, with a much more attractive and convenient pedestrian environment. The new thoroughfare is due to open in 2007.
6.51 Brighton & Hove Bus Company offers its full support to the PTP programme and all other sustainable transport initiatives in Brighton. The buses feature a number of messages on the back and sides, encouraging people to use the bus rather than driving into the city, along with route information. Displaying these messages means the company foregoes traditional bus-side advertising revenue.

Evaluation

PTP Phase 1 – initial data analysis report – June 2006

6.52 B&HCC commissioned Social Research Associates (SRA) to undertake a baseline survey/consultation exercise in 2006 prior to the PTP intervention in the months of March and April. For the purposes of this survey, 10,000 households were identified in the west of the city where the first PTP campaign was to be undertaken, and a survey was taken to 1,968 households located in the wards of North Portslade, Hangleton and Knoll and South Portslade.

6.53 The aims of the consultation were to:

- undertake travel behaviour research in the Portslade and Hangleton area prior to the start of the Personalised Travel Planning intervention;
- find out patterns of travel behaviour and attitudes towards travel within the area;
- provide a benchmark on household transport trends and usage;
- gather data on all of the above issues and criteria at sub-city level;
• provide a baseline against which the outcomes of the project could be measured to inform the campaign, initially in the area and then across the city.

6.54 The survey questionnaire contained 12 questions and was divided into the following sections:
• a travelogue of journeys undertaken the previous day;
• respondents use of, and attitudes towards, car and bicycles;
• monitoring information and profiling of respondents.

6.55 Doorstep interviews were conducted across days of the week and at various times of the day in order to ensure a full balance of activities could be tracked.

6.56 The key findings from the data are presented below. A copy of the travel diary and questionnaire can be found in Appendix 6B.

**Current travel patterns**

6.57 Overall, respondents made an average of 2.1 journeys per day.

6.58 23% (445) made no trips at all, while 6% (117) made five or more trips, the maximum recorded number being nine trips by eight respondents.

6.59 The most common length of time taken on a journey was between 11 and 20 minutes by 34% of all respondents to all journeys undertaken.

6.60 The peak time for journeys to be started was between 11.00 and 14.15.

6.61 7.5% of all journeys were undertaken by those aged 35–44 and took between 11 and 20 minutes.

![Figure 6.7: Mode of transport used for journeys undertaken](chart.png)

Base: 4,090 journeys

Overall percentage
6.62 Overall the most common reasons stipulated for making a journey were:

- 44% to return home;
- 16% to go to work;
- 16% to go shopping;
- 13% for leisure purpose.

**Current use of car and other modes of transport**

6.63 The most common form of transport over all journeys made was by car as a driver, 54%.

6.64 Of the 4,090 journeys recorded (Figure 6.7):

- 2,198 (54%) were driving a car;
- 649 (16%) were by bus;
- 554 (14%) walking;
- 414 (10%) were by car as a passenger;
- bicycle (37) and motorbike (25) each accounted for under 1% of all journeys made.

6.65 Car as a driver accounted for over 40% of all journeys in all age ranges except the youngest (16–24 – 23%) and the oldest (75 plus – 34%) age ranges (Figure 6.8).

6.66 The bus was the most common form of transport for the 16–24-year-olds (26%), and for those respondents 75 plus the bus was a close second (33%) behind car as a driver.

6.67 The shortest journeys (up to 5 minutes) involved the highest percentage of children travelling (32%), with journeys over an hour involving the smallest percentage (11%).

6.68 Travel beyond the city boundaries only accounted for 16% of all car drivers journeys, whereas 28% of all train user journeys went beyond Brighton and Hove.
Other tables and graphs of note are illustrated in Figures 6.9–6.11. The most common form of transport over all journeys made was by car as a driver (54%). Of the 4,090 journeys, 2,198 (53.7%) were driving a car, 16% (649) were by bus, 13.5% walking and a further 10% were by car as a passenger (Figure 6.9).

### Figure 6.9: Respondents, mode of travel, Brighton and Hove

<table>
<thead>
<tr>
<th>Transport used to travel</th>
<th>Responses</th>
<th>Per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>554</td>
<td>13.5</td>
</tr>
<tr>
<td>Bicycle</td>
<td>37</td>
<td>0.9</td>
</tr>
<tr>
<td>Bus</td>
<td>649</td>
<td>15.9</td>
</tr>
<tr>
<td>Train</td>
<td>65</td>
<td>1.6</td>
</tr>
<tr>
<td>Car as driver</td>
<td>2,198</td>
<td>53.7</td>
</tr>
<tr>
<td>Car as passenger</td>
<td>414</td>
<td>10.1</td>
</tr>
<tr>
<td>Commercial vehicle</td>
<td>77</td>
<td>1.9</td>
</tr>
<tr>
<td>Taxi</td>
<td>63</td>
<td>1.5</td>
</tr>
<tr>
<td>Motorbike</td>
<td>25</td>
<td>0.6</td>
</tr>
<tr>
<td>Other</td>
<td>8</td>
<td>0.2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4,090</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

1 Numbers of all journeys (1–9) grouped together.

2 Journeys matched against each other
6.70 Figure 6.10 illustrates the mode of transport people use to travel for different reasons and to different destinations.

Figure 6.10: Reasons for using mode of travel used for various journeys

<table>
<thead>
<tr>
<th>Reason for travel by transport used</th>
<th>Car as driver</th>
<th>Car as passenger</th>
<th>Walking</th>
<th>Bicycle</th>
<th>Bus</th>
<th>Motorbike</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work</td>
<td>60%</td>
<td>7%</td>
<td>9%</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Return home</td>
<td>56%</td>
<td>10%</td>
<td>14%</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faith</td>
<td>28%</td>
<td>19%</td>
<td>16%</td>
<td>31%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leisure</td>
<td>55%</td>
<td>14%</td>
<td>14%</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td>49%</td>
<td>9%</td>
<td>18%</td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health</td>
<td>50%</td>
<td>15%</td>
<td>15%</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>66%</td>
<td>4%</td>
<td>21%</td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>64%</td>
<td>6%</td>
<td>15%</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6.71 The most frequent length of journey is between 11 and 20 minutes’ duration for: car as a driver and as a passenger (33%); commercial vehicle (35%); motorbike (46%); taxi (34%); and bus (29%). The most frequent journeys undertaken by bicycle (28%) and walking (30%) last between 6 and 10 minutes, and journeys by train most frequently top one hour (25%) (Figure 6.11).
Attitudes towards car – potential for change

6.72 The survey identified:

- 21% of respondents said they did not have a car or van in their household, but 31% said they had two or more;
- 10% of all respondents said they had cycled in the last month. 31% of respondents said they would consider cycling. The majority of these were aged between 16 and 34;
- 38% of those who had a car available ‘most of the time’ said they would consider cycling. For those without a car, 21% said they would consider cycling;
- 35% of people surveyed said they did not have a car/van available to drive;
- 94% of those whose transport was car as a driver said they had a car available ‘most of the time’.
6.73 When asked about their attitudes towards use of the car:

- 35% of respondents agreed that they intend to reduce their car use in the future, but 23% strongly disagreed;
- 60% agreed reducing their car use was something they had complete control over (13% strongly disagreed);
- 43% agreed that using their car was something they did automatically, without really thinking, but 32% disagreed or strongly disagreed;
- 76% of respondents agreed they were confident planning journeys when not using a car;
- 84% of respondents felt air pollution and congestion were serious problems facing their community.

6.74 A control group has not been used in the Brighton evaluation method.

6.75 B&HCC will be able to utilise a relatively large amount of corroborative data to supplement the evaluation and analysis of the council’s corporate research team.

**Impact and effectiveness**

6.76 The survey work being undertaken since the 2006 PTP intervention in Portslade and area has been designed to test effectiveness of the different elements of the PTP programme. The council officers feel no strong need to prove that PTP is working overall, although the data indicates that it is having an impact.

6.77 A telephone snapshot survey was done immediately after intervention, with 164 out of the 250 people contacted.

6.78 The city council’s independent corporate research and monitoring team has undertaken a doorstep baseline monitoring exercise of 2,000 households in the 2006 PTP area, to assess the impact of the 2006 PTP intervention. The team completed this in April 2007 and is currently analysing the results. These will be published widely. At the time of writing, the council says it can report, with statistical confidence, the following results for trips over one day:

- Car driver trips have decreased by 6% over the year 2006 and 2007:
  - trips: 2,198 to 2,065;
  - mode share: 53.7% to 50.1%.
- Cycling trips have increased by 122% over the year 2006 and 2007:
  - trips: 37 to 82;
  - mode share: less than 1% to a full 2%.
• Walking trips have increased by 39% over the year 2006 and 2007:
  – trips: 554 to 769;
  – mode share: 13.5% to 18.7%.

6.79 In terms of trips over the year in the 2006 PTP area, these figures equate to:
• 509,723 fewer car trips;
• 823,988 more walking trips;
• 172,463 more cycling trips.

6.80 If the city council were to deliver PTP using its model across the entire city of 250,000, the potential exists therefore for:
• 5 million fewer car trips;
• 8 million more walking trips;
• 1.7 million more cycling trips.

6.81 Of course, measuring behaviour change is difficult, because of the number of societal influences and, as such, B&HCC will continue to work with the country’s leading statisticians to validate further these results and projections.

Successes and failures

6.82 One positive element of the PTP programme so far has been the media coverage. Local papers are frequently critical of local authorities – however, at The Argus (Brighton’s local paper) one of the senior journalists is a keen cyclist, and this link has helped to generate a lot of media attention and publicity. Numerous articles have been run in the paper – for example in October 2006, towards the end of the first PTP intervention, the paper featured a double page spread with the headline ‘Cyclists give motorists a run for their money’. Another double-page spread featured the Car-Free Day in September 2006, despite the poor weather that morning. These features, together with positive letters from members of the public, have proved successful in a popular medium.

6.83 However, there have been a few negative comments from readers who have written in. Of the 17 cycling groups in Brighton, two have complained about the amount of money being spent on ‘freebies and frippery’ instead of cycle training. Coincidentally, one of the people complaining did offer cycle training services. However these two groups do have large mailing lists, which could prove potentially detrimental to the project.

6.84 One of the key risks to the PTP programme would be if there was a change in the administration of the local authority that in turn led to changes in the programme and/or new spending priorities.
The council’s PTP staff team is fundamental to the programme. If key members of staff were to leave the local authority within a short time, further implementation of the PTP programme could be delayed or brought to a halt. Two of the key staff are working to fixed-term contracts. However, PTP is a growth area, and that should in principle make recruitment a little easier.

On a day-to-day basis, the management of the travel advisors during a PTP intervention is a time-consuming and challenging task for the council team, requiring hands-on involvement.

Other general issues

If B&HCC could start over, they would work harder to ensure that they had the right staff in place at the right time, as it is fair to say that the 2006 PTP programme was delivered in a bit of a rush, doing approximately one year’s work in about five months. B&HCC would also make sure that the funders were happy with all of the proposals at the outset to avoid any misunderstandings later on.

B&HCC has learnt from the experience gained during the first year of their PTP programme (2006) and made changes to the 2007 programme. For instance, the incentives have been amended to ensure they are more attractive to a greater number of residents.

The 2007 PTP intervention started on time on 18 June 2007, to coincide with the start of Bike Week and will run until mid-October 2007. In the launch week, the council ran a series of high-profile events across the city, with billboard advertising up at carefully selected sites in the second PTP area to raise project awareness. All of these events are co-ordinated and branded ‘JourneyOn’ and the PTP travel advisors are known as ‘Your Journey’, so that at the doorstep and during events a consistent message is being delivered. On the launch morning, the travel advisors provided 200 free breakfasts for cyclists and a host of promotional incentives to individuals considering cycling.
Appendix 6A: Job description: travel advisor

Travel Advisor – 6 positions

Start date: 11 June 2007
Period of employment: Until October 2007
Wage: £8 per hour
Shifts: Daytime Shifts 9 am – 5.30 pm
Evening Shifts 11.30 am – 8 pm
Saturday shift: 10.00 am – 6 pm

We are looking for six enthusiastic and dedicated people for an innovative project this summer.

As a key member of the team, you will be required to engage with the public face to face to encourage them to use sustainable forms of transport. Contact will be made through door-knocking in an area of West Hove, and at events, and candidates must be willing to work outside all summer. Travel Advisors will be required to work three evenings per week and alternate Saturdays.

Committed to cycling or sustainability, your communication skills will be first rate. Your experience of providing a customer-focused service will be supported by your calm and flexible approach. Comprehensive training will be provided.

Closing Date: Wednesday 23 May

Resource Assistant – 2 positions

Start Date: 11 June 2007
Wage: £7 per hour
Shifts: Weekdays 9 am – 5 pm

We are looking for two candidates to undertake the role of Resource Assistant. Duties will include data entry and packing information.

With experience of working to targets in a pressurised environment, you will need to be well organised and have a keen eye for detail. We are looking for an enthusiastic team player, with good IT skills, and a flexible approach. Comprehensive training will be provided.

Closing Date: Wednesday 23rd May

To apply, please send your CV, and a covering letter to:

travel.planning@brighton-hove.gov.uk by Wednesday 23 May 2007.
For more information, please call Charlotte Welch on 01273 293862
# Appendix 6B: Travel diary and questionnaire

**Journey Date (yesterdays) 2006**

<table>
<thead>
<tr>
<th>Journey</th>
<th>Reason for Journey</th>
<th>Please tick all that apply</th>
<th>Reason for Journey</th>
<th>Please tick all that apply</th>
<th>Reason for Journey</th>
<th>Please tick all that apply</th>
<th>Reason for Journey</th>
<th>Please tick all that apply</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Journey 1**

<table>
<thead>
<tr>
<th>Journey weather?</th>
<th>Please tick one</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stormy</td>
<td></td>
</tr>
<tr>
<td>Light rain/snow</td>
<td></td>
</tr>
<tr>
<td>No rain/snow</td>
<td></td>
</tr>
</tbody>
</table>

**Transport used Code**

<table>
<thead>
<tr>
<th>Mode</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>1</td>
</tr>
<tr>
<td>Bicycle</td>
<td>2</td>
</tr>
<tr>
<td>Bus</td>
<td>3</td>
</tr>
<tr>
<td>Train</td>
<td>4</td>
</tr>
<tr>
<td>Car as driver</td>
<td>5</td>
</tr>
<tr>
<td>Car as passenger</td>
<td>6</td>
</tr>
</tbody>
</table>

**Commercial vehicle**

<table>
<thead>
<tr>
<th>Code</th>
<th>Start and destination Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Home</td>
</tr>
<tr>
<td>8</td>
<td>Have</td>
</tr>
<tr>
<td>9</td>
<td>Portside</td>
</tr>
<tr>
<td>5</td>
<td>Brighton</td>
</tr>
<tr>
<td>4</td>
<td>Beyond Brighton and Hove</td>
</tr>
</tbody>
</table>

**Journey Details**

<table>
<thead>
<tr>
<th>Journey</th>
<th>Start time</th>
<th>Total Number Traveling</th>
<th>Interim stop/stop/s</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(2011)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Day trips continued if required**

<table>
<thead>
<tr>
<th>Journey</th>
<th>Reason for Journey</th>
<th>Please tick all that apply</th>
<th>Reason for Journey</th>
<th>Please tick all that apply</th>
<th>Reason for Journey</th>
<th>Please tick all that apply</th>
<th>Reason for Journey</th>
<th>Please tick all that apply</th>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Interviewer:**

<table>
<thead>
<tr>
<th>Area</th>
<th>1</th>
<th>2</th>
</tr>
</thead>
</table>

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131
<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Have you noticed any improvements in cycling facilities in Brighton &amp; Hove over the past 12 months?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. How many cars or vans and bicycles in your household?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Do you personally have a car or van available to drive?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Number of people in your household (including yourself)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Cyced in last month?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Would you consider cycling?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Sex</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Housing Tenure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Employment status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Disability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Which ethnic group would you place yourself in?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Religion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Sexuality</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** This table is a sample of a survey format containing various questions, options, and fields for data collection. Each question has multiple-choice answers with additional details for some fields.
7. Transport for London PTP

7.1 Interviewees:
- Sinead Flavin (TfL);
- Peter May (TfL) – present for part of interview;
- Dan Johnson (TfL) – present for part of interview.

General background

7.2 Personal Travel Planning (PTP) sits within Travel Demand Management (TDM) at Transport for London (TfL). Commencing with a small team of three, TDM has become a TfL department and is now a directorship.

7.3 PTP forms only one part of the work of the TDM department. PTP’s effectiveness will have to be demonstrated if it is to continue to command investment. If evaluation cannot show it is working, then the money will be spent on other TDM initiatives.

PTP pilot schemes: 2003 onwards

7.4 TfL has been working on PTP schemes since 2003, in partnership with the borough in which each scheme is located. The PTP programme commenced with pilot schemes, undertaken to help evaluate the potential of PTP to deliver modal shift, to see if the business case for larger scale PTP interventions could be established. There were four different pilots:
- Kingston: using the Socialdata IndiMark method, with Sustrans;
- Enfield: in Edmonton Green, where consultants Steer Davis Gleave delivered generic local travel and amenity information and PTP; this also covered a social housing estate;
- Southwark: individualised marketing scheme, focused on car-owning households, delivered by consultants Colin Buchanan;
- Lambeth: consultants Peter Brett Associates provided local travel information to a sample of households, but the information was not individually tailored.

7.5 Overall the results showed a 6% modal shift from car to other modes. There was a significant variation in the rate of modal shift, the highest shift being 12% in Kingston. The pilots demonstrated a cost–benefit ratio of 31:1, which helped to make the business case for a roll-out of PTP on a larger scale.
PTP schemes: 2006

7.6 In 2006 two large-scale schemes were undertaken, together with one smaller-scale project:

- Kingston: in the New Malden area with a target population of 22,299 households;
- Haringey: in the area around Alexandra Palace with a target population of 31,324 households; and
- Sutton: in the Worcester Park area, covering 6,545 households.

7.7 The evaluation of the Kingston and Haringey PTP schemes uses a panel telephone survey approach, each with a control group and each involving three stages:

- pre-stage (baseline) – 2,000 survey responses captured, forming panel (1,000 in target area, 1,000 in control);
- interim survey – 250 survey responses captured from residents that are not part of panel (i.e. it is independent of pre- and post-stage surveys). Provides a measure of how the materials and intervention was received as well as an indication of travel awareness and behaviour;
- post-survey – taken one year after the baseline, 500 survey responses captured from panel in both target and control areas. Key indicators are modal shift and changes in mileage driven.

7.8 Interim results are already available for the New Malden and Alexandra Palace schemes, and their final survey results should be available in summer 2007. The Worcester Park scheme was a pilot for a Sutton-wide roll-out.

PTP schemes: 2007

7.9 In 2007, TfL is undertaking two PTP schemes:

- Sutton PTP: part of a wider integrated Travel Demand Management (TDM) programme under the name ‘Smarter Travel Sutton’. The PTP element will target the remainder of the Sutton borough, some 70,000 households;
- Camden: the scheme will target 30,000 households in Camden North under the name ‘Travel Camden’.

At the time of the interview, the travel advisors were about to be trained, and the schemes were expected to be completed in October 2007. Final survey results for these schemes will be available in summer 2008.
Reasons for the TfL PTP programme

7.10 The Mayor of London’s transport strategy aims to encourage Londoners to do more walking, cycling and make more use of public transport. The objectives are to combat congestion, reduce transport’s adverse impact on the climate, help individuals to improve their health and to save money. The main aim of TfL’s PTP programme is to help Londoners to reduce car dependency.

Targets and objectives

7.11 The TfL PTP programme has not set targets for increases in each travel option. The aim is to reduce car dependency rather than promote any particular alternative mode. PTP is expected to respond to individuals’ needs and values. The advice may be service rather than transport related, for example providing information about local services within walking distance, which may lead to the substitution of a short journey on foot or by bike for what would otherwise have been a longer journey by car or public transport. The team also provides information on greener driving techniques.

7.12 The indicators used in the Smarter Travel Sutton PTP scheme and the smaller PTP Travel Camden roll-out will include changes in car mileage and modal split. For both Camden and Sutton, the results of the final surveys will be compared with the pre-intervention data and information from a control area (in Croydon in the case of Sutton and in Islington in the case of Camden). The evaluation of the Camden programme will follow the same approach taken for the 2006 Harringey and Kingston schemes (see paragraph 7.7).

7.13 The Sutton PTP scheme is part of a wider integrated TDM programme integrating PTP, workplace travel planning (WTP) and school travel planning (STP). The evaluation measuring the influence of the three programmes will include two survey types:

- behavioural and attitudinal telephone surveys with circa 1,500 residents; and
- on-street surveys at high trip generating sites, circa 500 interviews.

7.14 TfL will corroborate the results using independent data such as pre- and post-intervention traffic and cycle counts, public transport patronage data and congestion data.

7.15 Public transport ticket sales data will not be used. In London, the high number of off-bus sales outlets, multiple ticket and payment options and the reduction in on-vehicle ticket sales make it impossible to link ticket sales to particular areas.
7.16 However, it is worth noting that pre-paid Oyster cards worth £5 are being used where appropriate to incentivise some journeys. Each has a unique reference number that can be anonymously tracked.

7.17 The Sutton evaluation data set that can pick up effects of PTP will be the behavioural and attitudinal survey. The relevant surveys are:

- Sutton baseline survey September 2006;
- follow-on survey September 2007/08/09;
- Croydon control group September 2006/07/08/09.

7.18 The September 2007 survey will include:

- an area where there has been PTP intervention and where school and workplace travel plan partners have been targeted for more intensive work to coincide with the PTP intervention;
- an area where school and workplace travel plan partners have been targeted for more intensive work, but no PTP intervention has taken place;
- a control area, where there has been no PTP intervention, where all school and workplace travel plan partners have not been targeted for more intensive work.

7.19 This will allow TfL to assess whether a co-ordinated approach using PTP, as well as working through schools and workplaces, produces a multiplier effect.

**Operating structure of scheme**

**Areas chosen and reasons for choosing them**

7.20 The team uses ‘Smart Lifestyle Maps’ supplied by Steer Davies Gleave. These have been created using the results of a TfL survey showing which types of people in London had a propensity to change their travel habits, in conjunction with MOSAIC social profiling. Smart Lifestyle Maps segment the population into different types of social profiles with their associated lifestyle and travel behaviour characteristics. The maps enable TfL to identify areas where there are large numbers of people who appear open to change and therefore are likely to be fruitful prospects for PTP. The lifestyle and travel behaviour characteristics are illustrated in Table 7.1.
<table>
<thead>
<tr>
<th>MOSAIC neighbourhood type</th>
<th>Lifestyle characteristics</th>
<th>Travel behaviour characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family focus</td>
<td>Likely to have pre-school or school-aged children and to lead busy lives. Tend to be well educated and on good incomes in professional or service sector jobs.</td>
<td>Above average car use, but also average (or above average) use of all forms of public transport, and walking and cycling. Are open to ideas for reducing car use, but their ability to act on these is limited by lack of time.</td>
</tr>
<tr>
<td>City life</td>
<td>Like to live in the heart of the city/town with easy access to facilities and social life. Includes high-earning singles.</td>
<td>Many choose not to have a car, most make plenty of use of bus, tube and train.</td>
</tr>
<tr>
<td>Young-minded</td>
<td>Includes students and recent graduates, so have very little disposable income.</td>
<td>Car availability is low, so use of public transport, walking and cycling is high.</td>
</tr>
<tr>
<td>Detached prosperity</td>
<td>On high incomes and living in attractive, often detached, properties in suburban locations.</td>
<td>Car ownership very high. Prepared to use train and tube, but are less likely to travel by bus. Are supportive of public transport, but expect it to be of a high standard.</td>
</tr>
<tr>
<td>Multi-cultural mix</td>
<td>Typically young singles and young families living in high-density urban areas, many in professional and service sector occupations with good qualifications, but also some on low incomes.</td>
<td>Use of car is around the average, bus and tube above average.</td>
</tr>
<tr>
<td>Near the breadline</td>
<td>Includes families and retired people struggling to make ends meet.</td>
<td>Overall volume of trip making is below average, and with low car availability, their use of bus is relatively high.</td>
</tr>
<tr>
<td>Motorised lifestyle</td>
<td>People on reasonable incomes, many in manual occupations and with lower education levels.</td>
<td>Car is dominant mode, with very low incidence of no car households. However, a substantial number of one-car households means significant public transport use. Below average walking or cycling.</td>
</tr>
<tr>
<td>Traditional values</td>
<td>Families with older children, 'empty nesters', and recently retired living mainly in suburban and rural locations.</td>
<td>Car use broadly average and do also use bus, rail and tube a fair amount. Tend to be self-sufficient and not open to change.</td>
</tr>
</tbody>
</table>
7.21 TfL aims to engage the City life, Family focus, Detached prosperity and Younger minded, as these are the groups that are believed to be more open to change, based on TfL research and previous PTP participation profiles. It is an iterative process, which will allow for improved interpretation of the Smart Lifestyle map and profiles.

7.22 The TfL team has a list of criteria against which new PTP locations are tested in order to choose a potentially good area. The criteria include:

- a high proportion of targeted Smart Lifestyle segments;
- good public transport accessibility level (PTAL) scores;
- availability of local services and facilities;
- consideration of how the London Borough is investing its transport funds;
- cycling and walking networks, especially good cycling opportunities;
- discrete self-contained locations away from central London;
- borough officer support and resources if possible;
- consideration of a political balance;
- local political support;
- links with new services and future developments, for example the Olympics, East London Transit and regeneration areas. Note – no PTP London scheme has yet done this, but is seen as a significant opportunity for the future.

7.23 The focus of the work is on reducing car dependency, and therefore areas outside central London, with higher than London average car ownership, have been targeted for this initiative.

7.24 This year Sutton was chosen because it gave TfL an opportunity to promote PTP as part of a wider programme that is bringing together workplace and school travel plans with travel awareness initiatives. TfL wants to see if this helps to achieve a multiplier effect as local residents receive information about sustainable travel options from a range of sources (e.g. school, work, at home, through the local media and at local events).

7.25 Sutton promotes itself as the greenest borough in London. According to focus groups, local residents are aware of this and proud about it. Therefore the population is seen as being amenable to PTP.

7.26 Camden was chosen because it met the criteria set out in paragraph 7.22.

**Accessibility of chosen areas**

7.27 TfL has not yet been involved in an area where a major new transport service is being introduced. However, TfL see this as an important area for future work, e.g. DLR extensions, East London Line, North London Line etc. The areas chosen for PTP intervention are always outside...
central London, as the majority of people in the centre of the city already walk, cycle or use public transport for most of their journeys.

7.28 The areas chosen always have a good existing public transport network. TfL also looks at cycling and walking networks within the area.

Operating structure of schemes

7.29 Figure 7.1 shows the operating stages of the schemes.

Figure 7.1: TfL PTP schemes: flow chart diagrams

Planning phase: materials and creative

- **Identify location**
  - Segmentation

- **Collateral**: TfL and borough – gatherer, review and ID

- Set up stock management and ordering system

- **Order Incentives/Gifts/prizes**

- **Creative**: identify additional supporting collateral and information required

- Design (intro letter, posters, post cards, bespoke info)
  - *(Team TfL’s Group Marketing and Creative Agency)*

- **Understand local residents**: carry out focus group work in local area *(synovate)*

Planning phase: stakeholders, media and PR events

- **Liaise with borough ID support events, and key local stakeholders, e.g. residents associations, local cycle and walking groups**

- **Develop events and competitive strategy** *(Method Two)*

- **Develop media strategy** *(TfL Group Media)*

- **Stakeholder liaison** – internal and external

- **Launch, advertorial, events, competitions, PR, posters**

- **ID internal synergies** (e.g. with TfL Surface) and external synergies (local activities etc.)
Contact stage

Advertise and hire travel advisors (Steer Davies Gleave)

Baseline evaluation (Synovate)

Travel advisor five-day training (Steer Davies Gleave)

Ongoing travel advisor support (Steer Davies Gleave and PTP team)

Initial contact – advisory letter

ID database needs (contact address and output analysis) and set up (Steer Davies Gleave)

Motivation: supportive dialogue: understand, non judgemental

Identifies individuals information/support needs

Empowerment: provision of tailored info, incentives and support

Support includes cycle training, incentives includes oyster cards, worth the walk discounts

Fulfilment and contact reporting

Trialing

Segmented letters to participants, further relevant info, events

Evaluation: Interim; and one year on (Synovate)

Reaffirmation: Follow up letter
Method of contact and approach

7.30 The initial contact is by letter, informing residents about the scheme and when the team will be in the area, so that they are expecting the travel advisor to call at the door.

7.31 At the same time there will be articles in the local press, on local radio and so on, explaining the process and the aims of the scheme, so that the presence of the team in the area becomes more widely understood.

7.32 The team of travel advisors starts in one part of the area and works its way through. This means that the team is visible on the ground, and offers greater personal security for the advisors.

7.33 The travel advisors call at every household in the area, knocking at each door. They aim to engage a member of each household in conversation about their current travel and how they would like to change their travel patterns. This helps the travel advisors to determine what support and information can be provided to help the householder make the identified changes. The appropriate information pack is then sent out to the household.

7.34 If there is nobody at home the travel advisor will return to the household on up to three further occasions, at another time of day or at the weekend. If after four home calls the travel advisors have still been unable to make contact, they leave a prepaid card for the resident to request travel and local information.

7.35 In the more affluent residential areas targeted by the travel advisors this approach has been successful in engaging households. In Camden, TfL are exploring a better approach on social housing estates, where house-to-house calling has previously proved less successful and accessibility for the travel advisors can also be a problem. In these areas the team is looking at ways of working through pre-existing social networks, community groups and community leaders to contact residents.

7.36 Once the face-to-face meeting has taken place, the information requests are put onto a database and the packs are made up and sent out to the householder. During 2006, in Kingston and Haringey this was done by post, using an external team for packing and delivery. In the Sutton trial the packs were delivered by hand, and this method will be undertaken in the Sutton-wide and Camden schemes. This provides an additional opportunity to talk to the householder, increasing visibility of the project and may be used to introduce a pledge element into the process.

Staff requirements

7.37 The TfL PTP team has four full-time staff members:

- PTP team manager, who has overall responsibility for the PTP projects;
- PTP team member who manages events, budget management and procurement, evaluation and acts as the main contact for the Camden project;
- PTP team member who manages the Sutton project and evaluation; and
- PTP team member who is responsible for the management of all of the creative material and the development of some of the individual items.

7.38 Steer Davies Gleave employ the travel advisor team on TfL's behalf and provide pre-delivery training as well as some technical support, such as development of the database and local office IT support. In Sutton, targeting 70,000 households over about 28 weeks, the team comprises one local team manager, 24 travel advisors (one of whom will act as assistant manager), five data input staff and at least one member of staff to deliver packs by bicycle. In Camden, targeting 30,000 households over about 18 weeks, the team is to comprise one team manager, an assistant manager, 16 travel advisors, three data entry staff and one member of staff to deliver packs.

7.39 In addition to the staff directly involved in scheme delivery, the following companies undertake work for the TfL PTP programme:

- A considerable amount of the creative work is done by one member of the PTP team with the support of TfL's Group Marketing, who appoint and manage a creative agency on the team's behalf. The agency that is currently being used is OTM (www.otmbrand.com).
- TfL employs Method Two (www.methodtwo.com), the events company that organised the Bike Party at Alexandra Park in 2006. TfL will commission specific events in Sutton for the Sutton-wide roll out and these will include a cycling event linking to the Tour de France in London in June 2007, events at local shopping centres, Silly Walks, sponsored pub quizzes and so on. These are aimed at getting people involved at a community level.

**Staff training and qualifications**

7.40 Steer Davies Gleave recruit, employ and train the travel advisor teams.

7.41 A travel advisor team manager needs to have good people management skills. For travel advisors, local knowledge and motivation is more important than experience. TfL looks for a mix of travel advisors to reflect the community in which they are based. TfL has found from experience that older people, particularly older women, get a higher and more effective response at the door.

7.42 Steer Davies Gleave use a range of advertising methods to attract travel advisors, including websites, local papers, shop windows and local venues, which has helped to attract sufficient applicants for the work. A sample job advert can be found in Appendix 7A.

7.43 All travel advisors attend a five-day Steer Davies Gleave training course. The aims of the training are wide-ranging and include:

- to become acquainted and feel at ease with other team members;
- to gain a general understanding of TfL's PTP programme and in particular the household contact element of it;
• to get a clear understanding of the practical matters relating to the job: accountability, payment, expectations and responsibilities;
• to become familiar with the forms used to record information;
• to learn the travel information and to whom each item is best suited;
• to have an appreciation for some of the complexities involved in changing travel behaviour;
• to become familiar with the structure of the conversation;
• to get an appreciation of disabled people’s travel needs;
• to become familiar with the PTP scheme area;
• to learn about cycling in the PTP scheme area;
• to learn strategies for dealing with challenging situations.

7.44 Training starts at 0930 and finishes by 1700 each day, and incorporates morning and afternoon breaks. The days are a mixture of presentations, group exercises and break-out sessions to enable working in smaller groups. Two-thirds of one day is devoted to a site visit of the PTP scheme area. A training programme can be found in Appendix 7B.

Marketing and promotion

7.45 Marketing materials are developed to promote sustainable modes of transport, to draw attention to local services in an effort to reduce the distance people may travel to a certain service, and to widen people’s travel options in their locality. However, TfL finds this can sometimes be difficult as people are, or like too think they are, ‘savvy’ about their local knowledge and may not respond well to others telling them about a new service or services they already know about. A number of marketing materials are currently available in the public domain, but others are specially developed for an area.

7.46 TfL uses focus groups to discover people’s views of, and reactions to, their local area, changes planned to the local area, transport options, brand identity, logos and their placement, colours, what introductory information they would like as well as to test their creative material before it is finalised. Focus group work costs approximately £35,000 and takes place over four to five days. It involves individual interviews with local stakeholders and group work with local residents who reflect the nature of the borough or area. Typically six people are asked to participate in a focus group lasting three hours, and this is repeated four times with different participants. Participants are paid £50 for contributing to a focus group, but have to produce a project booklet on their views and opinions of the local area.

7.47 TfL were keen to better align some of the PTP products with the PTP message by using more environmentally sustainable materials. Focus group work undertaken in Sutton supported this view. Participants said that the materials used in earlier projects were glossy, did not feel environment-friendly (as they were not on recycled paper), looked too
dated, cheap and uninspiring. This was against the green, environment-friendly self-perception of Sutton residents and forced the designers to go back to the drawing board. The new information has a simple, green coloured theme, with earthy, naturalistic drawings and logos. Local pictures are usually used on the creative information, because this was highlighted in the focus groups as important. However, in Sutton there are no local landmarks, so pictures were considered to be less important.

7.48 Public transport maps have been developed showing the roads that buses travel along (i.e. as opposed to just showing bus stops). New, more practical walking maps have been created by overlaying a grid system on a map of Sutton. Each grid square equates to five minutes’ walking time. The number of steps per quadrant is also provided. Pubs are used as way markers, and the most heavily used walking routes are highlighted. On the reverse is a more detailed local map showing useful locations. This is a pilot walking map design for a wider London project. A directory of walking maps for all London boroughs is currently being developed.

7.49 Creating information materials, for example spider maps or walking maps, takes between four weeks and two months to get from concept to design. Z-card printing takes three weeks to print and finish/fold, whilst leaflets take five days to print.

7.50 A range of materials is currently being used on the Sutton project:

**Cycling**
- TfL Cycle Guide 17;
- Using the TfL Journey Planner for Cycling;
- Power of the Bike;
- Cycle Training in Sutton;
- Protect it – Register it.

**Walking**
- Borough walking map Z-card;
- Weekend walk maps;
- Wandle Trail map;
- Walking the Chalk – Enjoy London’s Chalk Downlands;
- London Loop Map 6 – Coulsdon South to Banstead Downs;
- London Loop Overview Map;
Public transport

- Multi-mode area based Z-card;
- Oyster information;
- tube map;
- SW London bus map;
- SE England and London Connections map [Network Map];
- train ticketing offers – 2-for-1;
- Travel more, see more – one-third off with Network Rail card;
- national rail train timetables – 7, 7A, W-loop.

Miscellaneous

- Cabwise – for safer, registered cabs;
- Save Money with Greener Driving;
- Visit Sutton – London's Greenest Borough;
- accessibility guide.

Incentives

- Oyster cards with £5 credit;
- pedometer;
- Backupz bike lights;
- pressure gauges;
- reflective snap bands;
- An Inconvenient Truth DVD.

7.51 Figure 7.2 shows examples of some of these materials (see also Appendix 7C).
7.52 Many of the newly created information materials are credit-card sized, as TfL’s TDM department realises that people like to be able to keep information on them, so the smaller the better, something they can easily store in a wallet, purse or handbag.

7.53 TfL makes good use of incentives and is currently trialling when the best time is to offer incentives, whether it is at the beginning of the process as an incentive to participate, halfway through the project to people who have committed to participation, or at the end of the project to reward people. Travel advisors are being asked to provide feedback on their views about the use and timing of incentives. TfL admits it is difficult to see which incentives are working well, so it is taking this opportunity to try different options out. TfL is also looking at offering rewards in future projects to people for not driving and is always looking to improve its incentives.

7.54 Oyster cards have been and will be offered to participants. In the 2006 Haringey and Sutton projects, Oyster cards cost TfL £6: £3 credit and £3 for the deposit. For the 2007 Sutton scheme, TfL has managed to reduce the administration fee to £1.10 and so will be adding £5 credit to the distributed cards. A new branded wallet for Oyster cards will also be available which will also be able to carry Z-card public transport information.
7.55 One incentive that was used in the Haringey and Kingston projects was the Worth the Walk vouchers that contained discounts for local bars, restaurants and services. They were mainly used by the travel advisors to get people to participate in the PTP project. The discounts with local services take time to negotiate and, though they were excellent for getting residents buy in at the door, the offers they contained did not appear to be taken up, and are not being pursued currently. Other incentives used in the past include umbrellas (2005) and anoraks (2005 and 2006). Incentives to be used in Sutton 2007 include *An Inconvenient Truth* DVD, tyre pressure gauges distributed with greener driving leaflet, energy-saving light bulbs, pedometers and reflective cycling strips. People are asked which incentive they would like after they have engaged in the conversation.

7.56 Marketing materials have become more sophisticated over time. For example, in the projects in Kingston, Haringey and Sutton, maps were produced that showed houses (by post code) in the middle of the map of their local world with bus stops and oyster ticket outlet points and a few facilities. Isochrones demonstrating walking distances were placed over the map to demonstrate how accessible services were on foot. The maps were more inspirational than practical but served to get people thinking about their mental map of their local area. The maps being used for the current roll-outs in Sutton and Camden are more functional, with a wide range of local facilities, including schools, doctors and dentists surgeries, pubs etc. Advertorials in the local press and on local radio have also been bought.

**Funding**

7.57 Currently, all PTP programme funding comes from TfL. The TfL TDM team is considering applying for European Union funding for further development.

7.58 A business case was made based on the four initial pilot schemes, which showed a 31:1 benefit–cost ratio.

7.59 The future funding of PTP in London will depend on the results. So far only interim results are available for Kingston and Haringey. The final results from Kingston will be available this summer.

7.60 Funding for 2007 is in place for PTP, and there is firm political support for travel demand management measures at TfL. But the funding will not necessarily be spent on PTP if the results of the current interventions are not favourable.

**Costs**

7.61 Table 7.2 shows the costs of the projects undertaken by TfL in 2006, including the costs per targeted households, the participation rates and the costs per participating households of each of the schemes.
Table 7.2: Cost per household

<table>
<thead>
<tr>
<th>2006 projects</th>
<th>Number of households</th>
<th>Total cost (£)</th>
<th>Cost per household (all targeted households) (£)</th>
<th>Participation rate (%)</th>
<th>Cost per participating household (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Malden</td>
<td>22,299</td>
<td>458,657</td>
<td>20.57</td>
<td>34</td>
<td>60.50</td>
</tr>
<tr>
<td>Haringey</td>
<td>31,324</td>
<td>517,995</td>
<td>16.54</td>
<td>34</td>
<td>48.64</td>
</tr>
<tr>
<td>Sutton</td>
<td>6,545</td>
<td>184,254</td>
<td>28.15</td>
<td>42</td>
<td>67.03</td>
</tr>
<tr>
<td>Totals all projects</td>
<td>60,168</td>
<td>1,160,906</td>
<td>19.29</td>
<td>35</td>
<td>55.28</td>
</tr>
</tbody>
</table>

7.62 The projected figures in Figure 7.3 show the economies of scale that can be expected as the number of households that are targeted within an area increase.

Figure 7.3: Budget projections
Figure 7.4 shows the cost distribution across a project.

£1.2 million has been set aside to cover the financial year 2007/08 PTP schemes in Sutton and Camden.

Integration with other transport related initiatives/projects

PTP Sutton is part of an integrated programme Smarter Travel Sutton. As such it is the first time that the PTP, school travel planning and workplace travel planning are formally working together. However, TfL has worked informally with schools elsewhere in the past. For example, TfL undertook a children’s photographic competition through local schools. Letters were sent out asking children to take photographs of how they travel, and provide captions. The children were provided with free disposable cameras. This was a low-cost intervention that provided free publicity in the local press, and the prizes were presented by the Mayor.

So far the TfL PTP team has not been active in an area where there have been major transport infrastructure developments.

TfL is exploring links with the health agenda. A possibility being looked at is working with GP surgeries and the possibility of GPs prescribing active travel in relevant cases. Messages and adverts linked to the PTP projects are displayed in doctors' surgeries where they are accepted.
Evaluation

7.68 The PTP programme commissioned by TfL is independently evaluated by Synovate. All survey work is done by telephone. For the 2006 projects, Synovate undertook a pre-PTP survey, an interim survey straight after the intervention, and the follow-up surveys will be undertaken one year later. The interim survey asks direct questions about the intervention as well as attitudinal questions, whilst the follow-up survey one year later does not mention the intervention at all. The headline results from interim surveys in Haringey and Kingston are displayed in Table 7.3.

7.69 The procedure that will be followed in Camden and Sutton is similar to the one used in Haringey and Kingston. But the approach to evaluation in Sutton has to be more complex, in order to establish the effects of combining PTP with school and workplace travel planning initiatives. So in Sutton the following evaluation procedure will be used:

- the Control Cell for Sutton is in Croydon;

<table>
<thead>
<tr>
<th>TFL PTP interim evaluation (survey sample in both areas: 250)</th>
<th>Haringey</th>
<th>Kingston</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households contacted (four attempts made)</td>
<td>19,122 (out of 31,324 households available in sample area)</td>
<td>15,386 (out of 22,299 available households in target area)</td>
</tr>
<tr>
<td>Households taking part</td>
<td>10,722 (56% of those contacted or 34% of the total available h/holds)</td>
<td>7,503 (49% of those contacted or 34% of the total available h/holds)</td>
</tr>
<tr>
<td>Percentage of households with access to cars</td>
<td>77%</td>
<td>89%</td>
</tr>
<tr>
<td>Percentage of households with access to bicycles</td>
<td>44%</td>
<td>60%</td>
</tr>
<tr>
<td>Percentage overall impression of the visit quite or very positive</td>
<td>83%</td>
<td>88%</td>
</tr>
<tr>
<td>Percentage opinions of ways of travelling changed for the better</td>
<td>30%</td>
<td>39%</td>
</tr>
<tr>
<td>Percentage saying they are walking or cycling more</td>
<td>24%</td>
<td>34%</td>
</tr>
<tr>
<td>Percentage considering using public transport more</td>
<td>16%</td>
<td>28%</td>
</tr>
<tr>
<td>Percentage of those considering using public transport more who have actually done so</td>
<td>55%</td>
<td>63%</td>
</tr>
</tbody>
</table>
• the Test Group is Sutton Borough;
• 15-minute telephone interviews will be undertaken;
• a matched but different sample of residents will be interviewed annually over three-year campaign;
• a survey will be carried out one year after the intervention, which will allow the measurement of the overall impact of the integrated campaign.

7.70 In addition Synovate will undertake face-to-face street interviews at high trip generators in the area, focusing on the individual trip, frequency of trips to that location and mode. This will be repeated in one year to evaluate changes.

7.71 Interviews before and after the PTP intervention are designed to measure modal and attitudinal shift amongst the target group (Sutton Borough), the pilot group (Worcester Park) and the control group (Croydon).

7.72 Included in the telephone survey questions are:

• Available transport options:
  – walk time to bus stop;
  – walk time to train station;
  – access to car;
  – average number of cars;
  – access to bicycle;
  – average number of bicycles.
• attitudes to transport;
• town centre most often visited;
• frequency of driving to most often visited town centre;
• satisfaction with town centre parking;
• modal usage (all modes that are used by the interviewee, even infrequently);
• modes used each month;
• journey purpose, frequency and distance travelled;
• modal split and journey type for journeys typically five miles and under;
• modal split and journey type for journeys typically over five miles;
• average distance travelled by each mode by journey type;
• car mileage index.

7.73 The sample sizes being used in the Sutton evaluation are 1,503 in Sutton, 503 in Croydon and 375 in Worcester Park. The samples are gender and age weighted to Sutton/Croydon profile taken from the 2001 census.
Impact and effectiveness

7.74 Table 7.4 shows the contact rate and the participation rate for the 2006 projects. For clarity, the definitions of the different rates are listed below:

- contact rate: the proportion of households that answered the door after three to four attempted visits, out of the total sample;
- participation rate: the total number of households that participated by requesting materials or support as a proportion of the total sample.

<table>
<thead>
<tr>
<th>Impact of PTP</th>
<th>Haringey (%)</th>
<th>Kingston (%)</th>
<th>Sutton (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact rate</td>
<td>61</td>
<td>73</td>
<td>80</td>
</tr>
<tr>
<td>Participation rate</td>
<td>34</td>
<td>34</td>
<td>42</td>
</tr>
</tbody>
</table>

7.75 Note: In Haringey only, those already travelling sustainably received a small reward and were therefore treated as participating. To make the comparison consistent, those recorded as already travelling sustainably in Kingston and Sutton (but did not receive a reward) are also included as participating.

7.76 Interim results from Kingston and Haringey found:

- very positive reactions about the visits and politeness of the travel advisors – 9 out of 10 respondents in Kingston and 8 out of 10 in Haringey were happy about the visit;
- a quarter of respondents in Haringey and a third in Kingston say they have started walking or cycling more;
- over 16% have considered using public transport more, but over 60% think that they are actually using public transport more.

Successes and failures

7.77 Successful initiatives tend to be ones that people can really get into. The Bike Party in Haringey went well, despite happening on a very cold Sunday. Local councillors and the local media attended, as well as a large number of children, and consequently the event was high-profile.

7.78 Following the success of the Bike Party TfL followed up with information about walking and cycling to events in the locality. In the borough of Kingston TfL sent out themed Christmas cards to participants relating to the information that they requested, e.g. leaflets to potential cyclists about cycling in the winter.
Things that went wrong and key barriers to achieving success

7.79 The first year after the concept of PTP had been accepted was difficult, as there was a very short time in which to organise the next schemes.

7.80 The 2006 schemes went well. However, the PTP external evaluation protocol is extremely robust and the team is a little concerned that they may not compare well with other UK PTP project evaluations, as they will attempt to measure the impact across an area and not amongst only those that participated. The PTP team are keen to review their evaluation methodology and compare the pros and cons of the approach taken here and the diary-based approach taken in some of the other similar programmes elsewhere.

7.81 As part of the evaluation of the schemes, the PTP team will be reviewing whether it can be shown to offer a ‘value for money’ approach, by identifying the most cost-effective elements of the existing approach and exploring whether there are any other approaches that could provide more cost effective targeting.

Key risks

7.82 Dealing with the local media can be problematic, as it can turn what is planned to be a ‘good news’ PTP story into a political attack on TfL.

7.83 There is a risk, especially in Sutton, of consultation fatigue. This is because the area will be targeted for a range of travel planning interventions at the same time, the PTP scheme, school travel plans and employer travel plans.

7.84 In Camden many of the residents are part of the Smart Lifestyle travel behaviour segment ‘City Life’. Whilst these people are targeted and do have a high propensity to participate, they are often hard to contact because of their lifestyle and work patterns. This segment is well educated and many are likely to already be travelling sustainably. There is a risk that the modal shift achievable in these circumstances may be significantly lower than other more mixed areas.

7.85 There is also a possibility that door-to-door contact may be ruled out in certain boroughs, which would cause TfL to change their approach. Data protection issues are also a potential risk in the future. There is a possibility that e-mail may become used more, but that gives potential participants a good opportunity to walk away without any personal dialogue.

7.86 Each of the schemes runs additional events and travel awareness activity to promote PTP, together with a web link that permits downloading of PTP information that is otherwise provided following the personalised door-to-door activity. The value of this is to boost awareness and benefits of trialling alternatives, as well as receptivity of travel advisors at the door. The risk is the difficulty of measuring the impacts of this and polluting the control group areas.
Lessons learned

7.87 TfL is always re-evaluating its work at different stages, after focus groups, after events and so on.

7.88 The initial pilots highlighted some problems that helped TfL to target its PTP programme in areas that have more people with a propensity to change their travel habits. For example, in Edmonton Green the population was more socially deprived than the other areas and had also already been heavily consulted on a range of issues prior to PTP. Therefore, participation rates were lower. In Clapham, the consultants chose to use random digit dialling to contact residents. This resulted in residents being contacted, who were outside the study area, and therefore would not be included in the pre- or post-intervention panel surveys.

7.89 In the first full year, the TfL PTP team was supposed to roll out PTP to 100,000 households. But it took time to move from the pilot stage to the full implementation stage as there were a variety of problems that needed to be ironed out.

Procurement of PTP

7.90 It takes time for companies to be included on the list of approved contractors, and so initially TfL had to work with pre-existing contractors rather than a contractor who was already experienced in the field for any aspect of the contract that was over £25,000.

Demarcation

7.91 TfL Group Marketing initially felt that PTP was primarily a marketing initiative and should be handled by that department. There are now clear working protocols for work between the PTP team and Group Marketing, and this works well.

Appointment of temporary staff as travel advisors

7.92 Temporary staff appointment within the timescale could not be achieved by TfL using its usual recruitment processes. The appointment of travel advisor staff directly by TfL or the local London borough would have been very time-consuming. This issue was solved by temporary travel advisors and the rest of the travel advisor team being employed by Steer Davies Gleave, although the consultants were initially only contracted to provide the travel advisor team training.
Call centre and telephone contact

7.93 Chemistry Communications Group was commissioned to set up a call centre by TfL. This decision was based on the theory that the initial contact could be made by telephone and that 60% of residents in the area would be accessible by this means. When the data arrived, it proved to cover just 35% of the target households. This is because of changes in data protection regulations, a rise in the number of households opting out of telephone marketing by signing up to the Telephone Preference Service, and increasing numbers of people without landlines (i.e. they only use mobile phones). The PTP contactable sample was reduced again to 9% after cross checking and removing any contacts that were also on the TfL customer database, again for data protection complications. All of this has had a serious impact on the effectiveness of the telephone as a contact option for PTP.

Gaining experience from direct contact in the community

7.94 It took almost a year to sort everything out and the roll-out was delayed. In the meantime the PTP team used other ways to get the PTP message across. The PTP team attended as many local events as they could, especially at weekends. These included farmers’ markets and ‘fundays’, which were especially useful for contacting young families. The participation rate was high (meaning that a large proportion took some information from the event) and this was encouraged by giving out small token free gifts. However, the PTP team note that this does increase the likelihood of polluting the control group.

Cultural influences on PTP planning and delivery

7.95 TfL stressed the importance of ensuring that the travel advisor mix meets the needs of the area targeted. For example, in Kingston there is a large Korean community, and the team got a high participation rate from this group by using a Korean advisor. They also did a preliminary study on Korean culture to ensure that there were no possible items or terms within the information, gifts or terminology used by the advisors that could inadvertently cause offence. Looking at cultural influences can also help travel advisors to understand other cultural barriers that may be preventing particular groups from using public transport.

7.96 The TfL PTP team did not develop information packs in a range of community languages. Instead, the borough translation service was used where necessary. In most households at least one family member could read English and would act as a translator for other family members. In addition, not all older family members could read in their own language.
Travel advisor training

7.97 It is important to ensure that the travel advisors are completely familiar with the materials they will be using. The information pack items, gifts and rewards need to be ready in time for the travel advisors’ training sessions.

Delivering travel information packs

7.98 The information delivery system needs to be robust and must match the overall sustainability aims of the scheme. In Kingston the packs were sent out by post by a dispatch company that was based in Herefordshire. TfL has changed the system as a result of this experience. The packs are now prepared in house by the travel advisor team, and then delivered by bicycle in the local area. The materials used to make the packs have a more sustainable feel and generally less glossy. The benefits of this system are that the packs can go out quickly, with the travel advisor team having greater control of the process through its database. It also provides an extra face-to-face meeting option in some cases and the process is visibly tied in to the sustainability ethos of the project.

Looking ahead: PTP+

7.99 The TfL PTP team is interested in extending the PTP service, by offering PTP+. There are important PTP opportunities when people experience key life events – for example moving house, moving schools, changing job or even New Year’s resolutions. TfL is particularly interested in new movers packs; however, a trial a few years ago working with various estate agents to provide Local Journey Planners was not without difficulties. The latter were asked to distribute travel packs to new homeowners. Although some estate agents agreed to do this, in practice few were given out. TfL is exploring other easier means of doing this, such as an IT map system that will produce information for each postcode, so packs can be produced when needed and generated by the estate agent. Smaller estate agents are apparently keen.

7.100 TfL is looking at other possible methods of contacting new movers. Ideas include reaching people when they sign up to council tax or when they contact energy and water suppliers. Residential Travel Plans are another way in, and TfL’s Draft Best Practice Guide on this topic is currently out for consultation.
Appendix 7A: Sample travel advisor job description

Do you want to help reduce congestion and pollution and improve the health and personal fitness of residents in and around New Malden?

Transport consultant, Steer Davies Gleave, has been appointed by Transport for London to recruit and train a team of 24 Local Travel Advisers (Ref NM/LTA) to help deliver an exciting project in partnership with the Royal Borough of Kingston upon Thames.

The Local Travel Advisers will call on 24,000 households in the community to talk to them about their local travel behaviour. Residents will be offered information and incentives to try and reduce their car use and increase their use of sustainable modes of transport including walking, cycling and public transport. Listening skills and the ability to converse with a wide variety of people are essential to this position. Candidates should have enthusiasm for the project and knowledge of the local transport infrastructure will be an advantage. Pay is £9.50 an hour for a 37.5 hour week, which will include some evenings (until 8pm) and some Saturdays. We will be looking to identify 4 Team Leaders who will be paid the higher rate of £10.50 an hour.

We are also recruiting 2 office based Travel Assistants (Ref NM/TAA) who will collate and send out information to households and answer phone and email enquiries. They will be based at the Guildhall in Kingston and need to have good administrative and organisational skills. Again, an enthusiasm for the project and knowledge of the local transport infrastructure will be an advantage. Pay is £8.50 an hour for a 37.5 hour week; Monday to Friday 09.00 to 17.30.

So if you want the opportunity to have a positive impact on the community in and around New Malden, have an interest in sustainable travel and enjoy talking to people, please get in touch. The contract period is for 11 weeks, starting on 2nd May and full training will be provided.

Please send your CV and a covering letter to Olivia Sinel at careers@Steer Davies Gleaveworld.net or by post to 28-32 Upper Ground, London SE1 9PD by Monday 10th April, quoting the relevant reference. Interviews will be held on 20th and 21st April. If you would like more information please call Olivia on 020 7919 8500.

Steer Davies Gleave is committed to equal opportunities.
Appendix 7B: Sample training programme

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Delivered by</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:30-10:15</td>
<td>Introductions &amp; Welcome</td>
<td>Lisa</td>
</tr>
<tr>
<td>10:15-10:30</td>
<td>Overview of day &amp; Introduction to Training</td>
<td>Sarah</td>
</tr>
<tr>
<td>10:30-10:45</td>
<td>Team Structure</td>
<td>Charlie</td>
</tr>
<tr>
<td>10:45-11:00</td>
<td>Morning Break</td>
<td></td>
</tr>
<tr>
<td>11:00-11:30</td>
<td>Introductions, aims and background to project</td>
<td>TRL</td>
</tr>
<tr>
<td>11:30-12:00</td>
<td>The PTIP Process</td>
<td>Lisa</td>
</tr>
<tr>
<td>12:00-12:45</td>
<td>Background to PTIP approach in Transport</td>
<td>Lisa</td>
</tr>
<tr>
<td>12:45-13:30</td>
<td>LUNCH</td>
<td></td>
</tr>
<tr>
<td>13:30-14:30</td>
<td>Working for SDG: Contracts and schemes</td>
<td>Vicky, Charlie</td>
</tr>
<tr>
<td>14:30-15:30</td>
<td>Employee Contact Form, Uniforms, Health &amp; Safety, mobile phones</td>
<td>Charlie</td>
</tr>
<tr>
<td>15:30-16:00</td>
<td>Demo Conversation – Q &amp; A</td>
<td>Sarah, Lisa</td>
</tr>
<tr>
<td>16:00-16:15</td>
<td>Afternoon Break</td>
<td></td>
</tr>
<tr>
<td>16:15-16:35</td>
<td>Project Monitoring</td>
<td>Lisa</td>
</tr>
<tr>
<td>16:35-17:00</td>
<td>Outlook &amp; Close</td>
<td>Lisa</td>
</tr>
</tbody>
</table>
7. Transport for London PTP
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Delivered by</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:30-09:35</td>
<td>Welcome &amp; Overview of day</td>
<td>Sarah</td>
</tr>
<tr>
<td>09:35-10:20</td>
<td>Disability and Transport</td>
<td>Jane Young</td>
</tr>
<tr>
<td>10:20-11:00</td>
<td>Preparation of Site Visits</td>
<td>Catherine</td>
</tr>
<tr>
<td>11:00-11:15</td>
<td>Morning Break</td>
<td></td>
</tr>
<tr>
<td>11:15-16:45</td>
<td>Site visits</td>
<td>Sarah, Catherine</td>
</tr>
<tr>
<td>16:45-17:00</td>
<td>Hand over task sheets at New Macker station</td>
<td></td>
</tr>
</tbody>
</table>
DAILY

Facilitator: Sarah Holt  Co-Facilitator: Lisa Buchanan  Presenters: Tom Cohen, Rob

Today’s aims are to:
1. Exchange information/share experiences about site visit
2. Learn about cycling in Kingston
3. Become more familiar with site job roles

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Delivered by</th>
</tr>
</thead>
<tbody>
<tr>
<td>09.30-09.35</td>
<td>Welcome &amp; Overview of day</td>
<td>Sarah</td>
</tr>
<tr>
<td>09.35-10.30</td>
<td>Site visit poster preparation: in groups (2 break-out rooms available)</td>
<td>Sarah</td>
</tr>
<tr>
<td>10.30-11.00</td>
<td>Poster presentations part 1 (Teams 1&amp;2)</td>
<td>Sarah</td>
</tr>
<tr>
<td>11.00-11.15</td>
<td>Morning Break</td>
<td>Sarah</td>
</tr>
<tr>
<td>11.15-12.00</td>
<td>Poster presentations part 2 (Teams 3&amp;4)</td>
<td>Sarah, Lisa</td>
</tr>
<tr>
<td>12.00-12.30</td>
<td>‘Freeps’ Conversation</td>
<td>Lisa, Tom</td>
</tr>
<tr>
<td>12.30-13.15</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>13.30-13.45</td>
<td>TAa Group 1: Conversation Practice</td>
<td>Lisa</td>
</tr>
<tr>
<td>13.45-14.15</td>
<td>TAa Group 2: Conversation Practice</td>
<td>Tom</td>
</tr>
<tr>
<td>14.15-14.30</td>
<td>TAas/TLs: Workload planning</td>
<td>Lisa, Sarah</td>
</tr>
<tr>
<td>14.30-15.15</td>
<td>Tips &amp; Tricks: Sharing what works in conversations</td>
<td>Lisa</td>
</tr>
<tr>
<td>15.15-16.00</td>
<td>Cycling in Kingston</td>
<td>Rob</td>
</tr>
<tr>
<td>16.00-17.00</td>
<td>Outlook &amp; Close</td>
<td>Sarah</td>
</tr>
</tbody>
</table>
### DAY 5
**Monday, 8th May 2006**

**Facilitator:** Sarah Holt  
**Co-Facilitator:** Lisa Buchanan  
**Presenter:** Emma Langmead  
**Team Manager:** Catherine

Today’s aims are to:
- Be familiar with the purpose and structure of team meetings
- Learn about strategies to deal with challenging situations
- Contact households by door knocking
- Evaluate first experiences

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Delivered by</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:30-08:35</td>
<td>Overview of day &amp; week to come</td>
<td>Sarah</td>
</tr>
<tr>
<td>08:35-10:45</td>
<td>Responding to reluctance &amp; dealing with difficult conversations</td>
<td>Lisa</td>
</tr>
<tr>
<td>10:45-11:00</td>
<td>Morning Break</td>
<td></td>
</tr>
<tr>
<td>11:00-12:15</td>
<td>Staff Meeting: Roles, releasing streets, anticipated weekly progress, Health &amp; Safety (going into people’s houses/getting past communal doors)</td>
<td>Team Manager with Lisa assisting</td>
</tr>
<tr>
<td>12:15-13:30</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>13:30-15:00</td>
<td>Door Knocking</td>
<td>Sarah, Lisa</td>
</tr>
<tr>
<td>15:45-16:45</td>
<td>Evaluation of Door Knocking experience</td>
<td>Sarah, Lisa</td>
</tr>
<tr>
<td>16:45-17:00</td>
<td>Evaluation of training course</td>
<td>Sarah, Lisa</td>
</tr>
</tbody>
</table>
Appendix 7C: Sample materials

Smarter Travel Sutton

Even small changes to your journey make a big difference

London Travel Information Inc. Dial-a-Route Call: London Buses and Cycling Telephone 020 7222 1734 or visit tfl.gov.uk

Textphones
Journey planner
Walking information
Southern Rail Customer Services
First Capital Connect Customer Services
National Rail enquiries
Local licensed minicab operators and taxis
The Smarter Travel Sutton Team
advice@smartertravel Sutton.org

Mayor of London

Transport for London

phone
email
Dear Resident,

Even small changes to your journey make a big difference

Smarter Travel Sutton is a partnership project between Transport for London and the London Borough of Sutton, to help reduce traffic congestion and improve local air quality. It’s all about increasing awareness of alternative travel options and their benefits, along with other services such as cycle training and car clubs.

One of our Travel Advisors will be visiting you in the next couple of weeks to offer you information and advice about the options that are available to you. Afterwards you will receive a free pack of personalised information.

Together we can make a difference!

If every household in Sutton left their cars at home just once a week, it would have a noticeable impact on traffic and pollution levels in your neighbourhood. In addition, replacing some of your shorter car trips with walking or cycling is good for your health and mind, as well as saving you money on petrol.

It’s a great opportunity for us all to make the borough of Sutton a more pleasant and even greener place to live. We hope that you’ll be interested in learning more about alternative ways to travel and we look forward to offering you the opportunity to take part.

Yours sincerely,

Andrew Gorton
Sutton Project Manager
The power of the bike

Excluded cycle paths

The bike

1. Learn to cycle.
2. Wear a helmet.
3. Be visible.
4. Use the correct signals.
5. Plan your route.
6. Keep the speed.
7. Be aware of other road users.

Cycle signage explained...

- Normal
- Stop

- Give way
- Roundabout
- Crossroad
- Curve on the road
- Pedestrian crossing

- Cycle path
- Medical emergency
- Cycle path
- No cycling
- No entry

- School
- Junction
- Roundabout
- Crossroad
- Curve on the road

- Cycle path
- Medical emergency
- Cycle path
- No cycling
- No entry
8. London field visit

8.1 Interviewees:
  - Andrew Gordon (Smarter Travel Sutton).

Introduction

8.2 TfL are undertaking two PTP projects in the capital this year; a large-scale project in Sutton consisting of targeting the whole of the borough (70,000 households) and a smaller-scale project targeting approximately 30,000 households in Camden. To enhance the case study write-up conducted with Sinead Flavin, Personal Travel Planning Manager at TfL, a visit was made to the Sutton field office to explore the workings of the office, discuss the operational side of PTP with Andrew Gordon (the Team Manager) and experience, first hand, the door knocking experience accompanying the travel advisors on a number of their visits.

8.3 The PTP operations in Sutton come under the umbrella of Smarter Travel Sutton, which is an initiative encompassing workplace, school and personal travel planning. The PTP operations have started well. At the launch of Smarter Travel Sutton in February/March 2007, there was widespread media attention from the BBC, ITV and local and national newspapers. This publicity has resulted in good recognition of the Smarter Travel Sutton brand and has helped to increase the contact rate of households.

Preparation

8.4 The Office manager, Andrew Gordon, has been preparing for the roll-out for the PTP operations in the six months leading up to the roll out of PTP. During this time he:
  - gathered information detailing all the addresses in the Borough of Sutton.
  - gathered information and characteristics of different areas of Sutton and the individual roads to include general demographics, street characteristics, nearby bus services, nearby cycle lanes, oyster card vendors, schools etc.
  - engaged with local stakeholders, including mobility groups and the Ethnicity Officer at the local authority.

Office location and set up

8.5 The Sutton field office is located on Westmead Road, almost equidistant from both Sutton and Carshalton rail stations. This location is roughly in the middle of the borough of Sutton, ensuring good access to the whole of the borough. The field office is set up in a serviced office occupying two rooms, with a further off-site storage space used for the project resources. One of the office rooms is used for storing the printed materials (collateral) and the other is used by the managerial staff, data entry clerks and the fulfilment staff (packing the individual information materials for each house).
Covering the targeted area

8.6 The project manager has divided the borough up into areas and each area has been divided up into zones. At the time of the field visit, the travel advisors were working in the north-west corner of the borough. This was causing a few logistical difficulties between the central office and the travel advisors location, but it is an accepted part of the project and there will be other times when the travel advisors will be very near to the central office. As the travel advisors are making the requisite journeys, they are of course on public transport or cycling, and therefore simultaneously fulfilling passive roles in promoting travel and brand awareness.

8.7 There is a bike that can be used by the office staff to reach the travel advisors if they need replenishing with Conversation Forms etc. The bicycle is also used for delivering the finished individualised household packs to the houses. When possible, packs are handed over in person ('Here is your requested pack') to reinforce the sustainable transport message and continue the personalised element of the service.

Operational characteristics

Field office

8.8 The office manager, assistant manager, data entry clerks and fulfilment staff are based in the office. A database was set up by Steer Davies Gleave containing all of the Sutton addresses and a household ID number was allocated to every household.

8.9 From this database, the office staff can produce ‘work sheets’ for the travel advisors, as well as various reports. The ‘work sheets’ produced are a list of addresses that travel advisors need to visit during their shift. There are 10 addresses on each sheet (A4 size) for ease of reference for the administration staff.

8.10 The other main paperwork is the Household Conversation Form that the travel advisors complete when talking to the different households. These completed sheets are taken back to the office, where the information and information needs and requirements of each household are input into the database. The information requirements can then be produced in list form and the resulting excel table is used by the fulfilment staff to prepare the individual household packs.

8.11 As demonstrated, the database is used alongside hard paper copies to store and record information. This is seen as an ideal way to manage the project, even though paper filing does take up a lot of space.

8.12 In the main office there is a large set of shelves containing a box of each of the individual information materials. The set-up makes it easier for the fulfilment staff to prepare the information packs easily and efficiently.
In the field – the travel advisors’ role

8.13 The travel advisors work a mixture of day, evening and Saturday shifts, in order to reach all of the households and demographic profiles in the borough with maximal equity. The travel advisors are not allowed to travel by car while they are working, and many choose to get around by bicycle. If they must travel by car, they must have a valid reason why, just in case a member of public spots them and contacts the Smarter Travel Sutton project team. Some residents might deem such activity to be hypocritical.

8.14 The travel advisors are provided with uniforms consisting of a bright yellow T-shirt, embroidered with the Smarter Travel Sutton brand and logo, and a blue raincoat. They carry rucksacks used for carrying their services sheets and a few example information resources. Some who are choosing to cycle around also wear the snap bands that they are offering as an incentive. This can prove very useful when talking to people at the door, being able to show somebody what they will be getting, should they choose to receive it.

8.15 The travel advisors’ first job is to distribute the introductory letter (please see Chapter 7, Appendix C). The letter explains the Smarter Travel Sutton project and informs people that a travel advisor will be calling at their house soon to offer people information about the travel options open to them. It is generally felt that this task is best done by the travel advisors, because then they know that the households have definitely received the letter, and it gives them more confidence and a stronger foundation in approaching the household a few days later to talk to a member(s) of the household.

8.16 The travel advisors aim to knock on doors approximately 24–48 hours after the introductory letter has been delivered. This short lag time means that the introductory letter is (hopefully) fresh in people’s minds and they are more likely to talk to the travel advisor. Also if a member of the household is not reached at the first knock, perhaps 24 hours after the letter was delivered, even at the time of the second knock, maybe another 24–48 hours later, the letter will still be quite fresh in people’s minds.

8.17 Households are usually first given a day knock. If nobody is in, the second knock will be in the evening. Sometimes this approach is reversed. The travel advisors are required to fill in the address sheets each time they knock at a door in order to record the outcome. This outcome may be:

- not in;
- in but decided but not to participate;
- in and decided to participate and Conversation Form filled in;
- in but already travelling sustainably.
8.18 If contact is not established after a day or evening knock, the sheets are returned to the office and redistributed to travel advisors working on the next Saturday.

8.19 It has been observed that day knocks are usually answered by elderly people/retired, evening knocks reach working families and a Saturday knock reaches the remainder.

8.20 Different-coloured ink is used to record the different times of knock, for example:

- day knocks are recorded in blue ink;
- evening knocks are recorded in black ink;
- Saturday knocks are recorded in red ink.

8.21 The general process and conversation between the travel advisor and the household happens as follows:

- Travel advisors introduce and identify themselves as being from Smarter Travel Sutton. They then make mention of the introductory letter delivered to the household in advance as a good starting point.

- Travel advisors generally have to explain the Smarter Travel Sutton project briefly and clarify that they are there to help the household with advice or information on travelling in and around the area by the different sustainable modes. Travel advisors make sure that people realise the service is free.

- At this point conversation is generally entered into where the travel advisors actively ask questions about the individual's and household's travel behaviour, for example ‘Do you own a bike?’ or ‘Do you own a car?’ or ‘What do you use your car for?’ etc. The individual from the household may also give away a few clues as to their travel behaviour and/or hobbies, e.g., ‘I drive up to the Underground station’ or ‘We enjoy cycling as a family at the weekend.’ Observations (without appearing too nosey) are also a good way to gauge interest in the project, for example a bicycle in the hallway. It is up to the travel advisor to pick up on these points and probe a little further. However, they are well trained and understand that some data mining is essentially non-verbal and more subtle. If perhaps children come to the door, it may be possible to ask about a school travel plan. Other probing points include enquiring about people's commute to work, facilities available to them at work and asking their general views on congestion.

- Once it has been established that the household are interested in participating, the travel advisor will fill in the Conversation Form. General questions ask about the number of people in the house, number of cars owned and the number of bikes owned. Then, depending on any past clues, the travel advisor will offer tailored information for walking, cycling, public transport and/or greener driving for the household along with the offer of one or two incentives that would most complement the information, for example a tyre.
gauge for a household that will be receiving a greener driving leaflet, snap bands for a household receiving cycling information or an Oyster card with £5 credit for a household receiving public transport advice.

8.22 Another talking point may be about any elderly and/or disabled persons in the house, as they may have very different needs to the rest of the family and may be unaware of what is available to them. In Sutton there is an organisation caused the SCILL access group which provides accessible transport services on behalf of the London Borough of Sutton. There is a detailed information booklet letting people know what services and facilities are available to them and how they can make the most of them. Making people aware of accessibility groups such as SCILL also helps the groups, as they will potentially be used more and so will be able to access better funding opportunities.

8.23 Often the travel advisors encounter complaints about other things such as over hanging trees or litter or something similar. Therefore all the travel advisors are given a card with useful numbers for the most common gripes and problems or for just general information. There are numbers for things like carers, trees and faith/religion, to name a few. Helping people with other problems may face is also a good way for the travel advisors to gain credibility with the households, giving them something extra and therefore is another way to potentially increase participation rates.

8.24 In Sutton, the travel advisors have been divided into four teams and each team has developed different styles of communicating with the public. Some are more assertive, others are a little more relaxed. One team has tried an almost ‘confrontational approach’ when faced with negative response to the project, asking people ‘Why aren’t you interested?’

Other general points for consideration

8.25 Health and safety concerns are paramount. All travel advisors carry mobile phones and meet up throughout their shifts to ‘check in’ with one another.

8.26 Travel advisors must be aware of cultural sensitivities – for example, members of some South Korean or Indian homes abide by cultural morals, such as it is impolite to talk to somebody at the door, and so they may invite the travel advisor into their home to discuss the project. As it stands, travel advisors are not allowed to enter people’s houses, because of a specific request from the London Borough of Sutton. Unfortunately, it is possible that participation and contact rates will fall because of this, along with the problem of disequity.

8.27 All of the project team are constantly looking for more information to offer households, and some of the travel advisors have extra knowledge or information that they can pass onto others.
8.28 During their training, staff visited different areas of Sutton and developed maps accompanied by photos and mental maps of areas. These have been placed on the walls of the office and serve to remind the travel advisors of different areas, as it may be a few weeks or months before they get to go back to an area. It is very helpful if the travel advisors are familiar with the area.

8.29 For households where English is not spoken, Smarter Travel Sutton arrange for a volunteer speaker of the household’s main language to make a visit to the household towards the end of the project.

8.30 The travel advisors have been trained to always try and turn negative experiences into positive ones. However, sometimes this is not always possible.

8.31 It is important to remember the characteristics of different areas, and so some time would be usefully employed considering which travel advisors are sent to certain areas, bearing in mind their approach tactics.
9. Nottingham PTP pilot

9.1 Interviewees:

- Claire Fleming (Nottinghamshire County Council).

General background

9.2 The Nottingham Personal Travel planning (PTP) project commenced in June 2003 and was completed in July 2004. The fieldwork was undertaken during the periods June to August 2003 for the ‘before’ surveys and May to June 2004 for the ‘after’ surveys.

9.3 The project was targeted at the Meadows and Lady Bay areas of Nottingham, both of which are self-contained residential areas, located to the south of the city centre (Meadows approximately one mile from the city centre, Lady Bay approximately two miles). The locations of the two areas can be seen on the map in Figure 9.1.

9.4 The pilot project was proposed as a result of earlier PTP trials involving Nottingham Trent University. This demonstrated the feasibility of PTP and in itself identified interesting findings, including the importance of the ‘prove to me’ attitude, effectively using PTP techniques to overcome barriers to sustainable transport modes by demonstrating how journeys by bus, walking and cycling could be more efficient than the car.

9.5 The areas were specifically chosen to serve as separate experiment groups (to see how PTP differed amongst the different neighbourhoods). The sites were also selected as the projects were due to coincide with an upgrade of the Number 11 bus service (which runs through the Meadows and Lady Bay, connecting them to the city centre). These bus upgrades included improved shelters, real-time information, and an upgrading of service patterns to a 10-minute frequency.

9.6 The steering group for the study comprised:

- Nottingham City Council;
- Nottinghamshire County Council;
- Nottingham City Transport and Trent Barton Buses (local bus operators).
The consultants delivering the PTP programme (individualised marketing initiatives and evaluation surveys) were Sustrans/Socialdata (using the IndiMark technique), who also formed part of the steering group.

Sustrans/Socialdata were one of six consultants that bid to undertake the work.

In total, 891 households were approached, of which 86 were not contactable, and a further 288 declined to participate. Of the 517 households that agreed to participate, the segmentation was as follows:

- 136 were classified as ‘regular user without further information required’ – i.e. one member of the household already uses sustainable modes regularly, and do not require additional information;
- 131 were classified as ‘regular user with further information required’ – i.e. one member of the household already uses public transport regularly, with an information wish;
- 187 were classified as ‘interested’ – i.e. not public transport users, but with members interested in receiving TravelSmart information. This is considered the most fertile group for PTP, and require personal contact, motivation and information;
- 63 were classified as ‘not interested’ – i.e. those who do not wish to participate and have no interest in receiving additional information or using sustainable modes.

**Targets and objectives**

The specific objectives were to:

- undertake a baseline travel behaviour survey prior to the marketing campaign on the target populations in Lady Bay and the Meadows (net samples of 500 people in each), with a separate control group drawn from the rest of Nottingham (net sample 400 people);
- develop a package of local travel information materials, incentives and other services to promote walking, cycling and use of public transport;
- offer individualised marketing services to households comprising 1,000 people, drawn at random from Lady Bay and the Meadows (control group);
- undertake a further travel survey on the target group (involving all participants in the individualised marketing) and control group (net sample of 400 people) six months after the marketing intervention;
- provide a comparative analysis of the impact of the individualised marketing intervention on mode choice and other key mobility indicators in Lady Bay and the Meadows.

**Sociological behavioural theories/behavioural underpinning**

The approach adopted in Nottingham was in accordance with the standard approach adopted by IndiMark (although, in the case of
Nottingham, no further contact was made with the not interested group). It is based on the principle that many individuals have become habitual users of the car and would be willing to try alternatives if they were better informed about them and facilitated to use them. The emphasis is on information and advice tailored to individuals rather than on exhortations or persuasion. It is founded on the principle that it is better to let individuals consider their travel for themselves rather than be advised how they should think about their travel. The approach involves segmenting households in the target population according to whether they are interested or not and whether they use sustainable modes regularly or not. Households select information and advice that they would like to receive from a menu of options.

**Operating structure of the scheme**

9.12 The areas were predominantly chosen as they were directly affected by the proposed improvement of the Number 11 bus service, and hence PTP was considered an appropriate tool for adding value to this bus based infrastructure investment. In addition, the areas were deemed important, as they have contrasting socio-economic conditions.

9.13 The study was managed by a client steering group. The client project manager was Claire Fleming (the interviewee for this case study). The role of the steering group was to oversee the implementation, and it is important to note that, during the study, the named individuals within the steering group changed on several occasions. This was reported to have led to a lack of continuity and buy-in to the project, and this is best reflected in the fact that, at the end of the study, there was no strong dissemination (internally or externally) of the findings reported by Sustrans/Socialdata. Whilst the study was formally reported to the steering group, there was no end of project ‘members’ seminar’ to disseminate the findings.

9.14 The consultant team was given the flexibility to deliver the project over a 12-month period. Postal and telephone contact with households in the target population was conducted from Socialdata’s call centre in Bristol. The local fieldwork (assembly and delivery of information packs, co-ordination of home visits) was conducted from a temporary field office established for a one-month period in a local leisure centre. The home visits were conducted by staff from the local bus companies (for public transport); Sustrans staff (for cycling); and locally recruited advisors (for walking). The training and briefing of the these advisors was undertaken by the consultant team.

**Marketing and promotion**

9.15 Extensive high-quality marketing material was developed to support the study with a variety of contributors. Table 9.1 illustrates what materials were provided and who provided them. This demonstrates a concerted effort by a variety of parties, the City Council, the County Council, bus and rail operators, Sustrans and the Countryside Agency.
<table>
<thead>
<tr>
<th>Category</th>
<th>Item</th>
<th>Publisher/Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>New local travel map</td>
<td>The Meadows and Lady Bay: Cycling, Walking or Going by Bus in the Meadows and Lady Bay</td>
<td>Nottingham City Council</td>
</tr>
<tr>
<td>Public Transport</td>
<td><strong>Bus:</strong></td>
<td></td>
</tr>
<tr>
<td>Information</td>
<td>Navy Line 1 and 2</td>
<td>Nottingham City Council</td>
</tr>
<tr>
<td></td>
<td>Green Line 6, 7, 8, 9, 10 and 11</td>
<td>Nottingham City Council</td>
</tr>
<tr>
<td></td>
<td>Pathfinder 91 and 91X</td>
<td>Nottingham City Council</td>
</tr>
<tr>
<td></td>
<td>Cotgrave Connection</td>
<td>Trent Barton Buses</td>
</tr>
<tr>
<td></td>
<td>Rushcliffe Lines 1, 2, and 3</td>
<td>Trent Barton Buses</td>
</tr>
<tr>
<td></td>
<td>Keyworth Connection</td>
<td>Trent Barton Buses</td>
</tr>
<tr>
<td></td>
<td>Service 22</td>
<td>Trent Barton Buses</td>
</tr>
<tr>
<td></td>
<td>Service 625</td>
<td>Reliance Buses</td>
</tr>
<tr>
<td></td>
<td>Stop Out Cinderellas (Night bus services)</td>
<td>Nottingham City Council</td>
</tr>
<tr>
<td></td>
<td>NCT Fares and tickets guide</td>
<td>Nottingham City Transport</td>
</tr>
<tr>
<td></td>
<td>Exploring Nottinghamshire by Bus</td>
<td>Nottinghamshire County Council</td>
</tr>
<tr>
<td></td>
<td>West Bridgford Area Guide</td>
<td>Nottinghamshire County Council</td>
</tr>
<tr>
<td></td>
<td><strong>Train:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Train Information Pack</td>
<td>Central Trains</td>
</tr>
<tr>
<td>General</td>
<td>Personal Journey Plan</td>
<td>Nottingham City Council</td>
</tr>
<tr>
<td>Cycling information</td>
<td>The Greater Nottingham Cyclists’ Guide</td>
<td>Nottinghamshire County Council</td>
</tr>
<tr>
<td></td>
<td>Rural Rides 2003: Guided Cycle Rides in Nottingham</td>
<td>Nottinghamshire County Council</td>
</tr>
<tr>
<td></td>
<td>Cycling in Rushcliffe</td>
<td>Nottingham City Council</td>
</tr>
<tr>
<td></td>
<td>Cyclists and tram tracks</td>
<td>Nottingham City Council</td>
</tr>
<tr>
<td></td>
<td>Cycling: The right bike for you</td>
<td>Sustrans</td>
</tr>
<tr>
<td></td>
<td>Cycling: In different conditions</td>
<td>Sustrans</td>
</tr>
<tr>
<td></td>
<td>Cycling: With children</td>
<td>Sustrans</td>
</tr>
<tr>
<td></td>
<td>Cycling: Security matters</td>
<td>Sustrans</td>
</tr>
<tr>
<td></td>
<td>Cycling: Finding your way by bike</td>
<td>Sustrans</td>
</tr>
<tr>
<td></td>
<td>Cycling: Basic bike maintenance</td>
<td>Sustrans</td>
</tr>
<tr>
<td></td>
<td>Cycling: Clothing and accessories</td>
<td>Sustrans</td>
</tr>
<tr>
<td></td>
<td>Cycling: Sharing your route</td>
<td>Sustrans</td>
</tr>
<tr>
<td>Walking information</td>
<td>Walk more – feel the difference</td>
<td>Countryside Agency</td>
</tr>
<tr>
<td></td>
<td>Walk in to Work Out</td>
<td>Department for Transport</td>
</tr>
<tr>
<td></td>
<td>Easy Strider: The Island Site Walking Map</td>
<td>Nottinghamshire County Council</td>
</tr>
</tbody>
</table>
Importantly, one of the most significant advances was the delivery of bus-stop specific timetable advice (presented in an easy to understand line diagram) across the Number 11 network at the same time as the PTP project. This has since been rolled out across Nottingham as an exemplar of best practice.

The project also benefited from using the Big Wheel marketing campaign, which is a strong sustainable travel marketing brand used across greater Nottingham. It is understood that the client team debated at length the merits of using the County/City Council logos, or those of the consultancy partners, but elected to use the Big Wheel, as this was perceived as having no negative connotations. In hindsight, the client team believed this was the right approach to take. Figure 9.2 shows examples of Big Wheel marketing materials that were used during the survey.

In addition to the marketing materials, gifts and incentives were also provided during the project to encourage modal change. These gifts and incentives included branded shopping bags and vouchers, as can be seen in Table 9.2.
9. Nottingham PTP pilot

Funding

9.19 The project was part funded by the Department for Transport (DfT) as part of the PTP pilot programme.

Costs

9.20 The total project costs were approximately £104,000, of which approximately £50,000 came from the DfT, with the remainder from partner funds. Of these partner funds some related to capital spend (e.g. bus timetables, maps etc.) and some related to staff time to run and manage the project (costed for all partners). Table 9.3 illustrates how the project was funded and how costs were attributed.

<table>
<thead>
<tr>
<th>Item</th>
<th>To whom offered</th>
<th>Why offered</th>
<th>How offered</th>
<th>Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>‘Big wheel’ branded calico shopping bag</td>
<td>All households ordering materials from order form. (Group Interested (I) and Regular Users (R))</td>
<td>To package materials and facilitate deliveries</td>
<td>During home deliveries</td>
<td>Sustrans</td>
</tr>
<tr>
<td>£5 Boots Voucher</td>
<td>All households taking part in service phase (Group ‘I’ and Group ‘R with’)</td>
<td>To encourage quick response order form</td>
<td>On TravelSmart order form</td>
<td>Nottingham City Council</td>
</tr>
<tr>
<td>TravelSmart alarm clock, pen or travel mug</td>
<td>Households with at least one regular user of sustainable travel modes. (Group ‘R’)</td>
<td>To reward users and reinforce travel behaviour</td>
<td>On separate order form, giving choice of three items</td>
<td>Sustrans</td>
</tr>
</tbody>
</table>
9.21 The breakdown of how these funds were spent is shown in Table 9.4.

Table 9.3: Funding sources for the Nottingham project

<table>
<thead>
<tr>
<th>Funding source</th>
<th>Amount (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>DfT grant</td>
<td>49,416</td>
</tr>
<tr>
<td>LTP</td>
<td>10,000</td>
</tr>
<tr>
<td>Nottinghamshire County Council</td>
<td>8,000</td>
</tr>
<tr>
<td>MOST EU funding</td>
<td>2,000</td>
</tr>
<tr>
<td>Big Wheel/Nottingham Development Enterprise</td>
<td>5,000</td>
</tr>
<tr>
<td>Local authority staff time</td>
<td>25,871</td>
</tr>
<tr>
<td>Other partners’ staff time</td>
<td>2,443</td>
</tr>
<tr>
<td>Travel costs</td>
<td>300</td>
</tr>
<tr>
<td>Public transport free passes</td>
<td>732</td>
</tr>
<tr>
<td>Provision of existing public transport information</td>
<td>630</td>
</tr>
<tr>
<td>DfT grant</td>
<td>49,416</td>
</tr>
<tr>
<td>LTP</td>
<td>10,000</td>
</tr>
<tr>
<td>Nottinghamshire County Council</td>
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</tr>
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<td>MOST EU funding</td>
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</tr>
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<td>Local authority staff time</td>
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<tr>
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<td>732</td>
</tr>
<tr>
<td>Provision of existing public transport information</td>
<td>630</td>
</tr>
</tbody>
</table>

9.22 The 48 TravelWise personalised journey planners were produced on an individual basis, and in staff time cost £828 to produce 48 journey plans, i.e. £17.25 per plan.
Integration with other transport related initiatives/projects

9.23 The project was an integral part of the Number 11 bus route upgrade. The evaluation included a control group which sought to account for this, although the view of the client project manager at the end of the study was that it was difficult to determine precisely the value that PTP brought to the project as the two initiatives were so closely linked (i.e. difficult to distinguish whether the benefits in terms of modal shift would have occurred as a result of the bus network changes alone). The consultant team accounted for these issues through the use of a control group, hence providing greater certainty that the reported modal shift can be attributed to the Individualised Travel Marketing (ITM) campaign.

Evaluation

9.24 The evaluation consisted mainly of travel behaviour surveys conducted before and after the ITM intervention. The survey methodology, using a self-administered mail-back questionnaire and travel diary, coupled with telephone motivation, was the same as that used by Socialdata in travel behaviour research both in the UK and overseas.

9.25 Separate ‘before’ and ‘after’ surveys were conducted across each of the target populations using matched samples of 450 persons net (Lady Bay) and 402 persons net (the Meadows); and among control samples (randomly selected from across the rest of Nottingham) of 409 persons net (before) and 485 persons net (after). The response rates achieved ranged from 61 to 86%.

9.26 The evaluation was reported in the end of project evaluation report produced by Sustrans/Socialdata.

Impact and effectiveness

9.27 The reported results (from the evaluation report) are as follows. A fuller review of evaluation issues is provided separately within the final research report.

9.28 The project examined various aspects of the participants’ travel behaviour. These included: the choice of mode used for trips; the personal mobility of participants as a result of the process; the spatial distribution of trips; trip purpose; travel time and car use.

9.29 The effect of TravelSmart on mode choice as reported is shown in Figure 9.3. This shows that the share of car driver trips in Lady Bay was reduced from 41% to 36% (after taking into account effects of the control group), while walking, cycling and public transport trips showed relative increases of 23%, 16% and 13% respectively. In the Meadows, car driver trips were reduced from 29% to 26% (after taking into account effects of the control group).
It is reported that there were only minor changes in personal mobility as a result of the project. The number of activities and trips undertaken on a daily basis and time spent travelling were constant in each area, with only slight reductions in distances travelled. A comparison between the two areas shows that Lady Bay residents are generally more mobile than people living in the Meadows, undertaking more activities, spending longer travelling, making more trips and travelling further.
Spatial distribution

9.31 Following the campaign, it is reported that Lady Bay residents made more trips within their own neighbourhoods and the city, and fewer trips to, from or within Nottinghamshire. Meadows residents made more local trips within the Meadows and fewer trips to the city and the county.

Trip purpose

9.32 TravelSmart had little effect on the type of trips being undertaken by residents of both areas. In Lady Bay the proportion of commuting trips remained constant at around one-fifth of all trips, as did shopping while leisure trips remained at one trip in three.

9.33 There is some consistency between Lady Bay and the Meadows, with work, education and personal business trips similar between the two areas. Meadows residents made more shopping trips, however, and made fewer escort trips and fewer leisure trips than Lady Bay residents.

Travel time

9.34 In Lady Bay, travel time remained constant between the ‘before’ and ‘after’ surveys. However, time spent walking and travelling by public transport increased by three minutes and one minute per day respectively. This also resulted in a reduction in time spent travelling by car.

9.35 In the Meadows, travel time increased slightly, with an average increase in daily walking time of two minutes, an increase of one minute per day spent on public transport and a reduction of time spent travelling by car to the tune of two minutes per day.

Car use

9.36 The reported changes in the daily use of private cars as a result of TravelSmart in both areas are.

- the proportion of cars used per day in Lady Bay remained unchanged, while in the Meadows it fell from 67 to 65%;
- trips per car per day in both Lady Bay and the Meadows declined from 2.6 to 2.3;
- duration of use per car per day in Lady Bay fell from 47 to 41 minutes and in the Meadows from 46 to 41 minutes;
- distances travelled per car per day in Lady Bay were reduced from 23.1 to 20.2 km and in the Meadows from 21.2 to 18.8 km;
- there were no measurable changes in average car occupancy, remaining constant at 1.4 people per trip in both areas.
Successes and failures

The client project manager set out very clear thoughts and recommendations on what had/hadn’t worked, and these are summarised below.

Successes

- PTP intuitively (irrespective of evaluation results) added value to the roll-out of improved bus services across the targeted areas, raising awareness and having some contribution to increased patronage.
- The use of the established ‘Big Wheel’ branding provided strong identity to the PTP programme.
- The project was delivered on time and budget.
- There was a general acceptance that the study had been worthwhile.

Failures/shortcomings

- The client group considered that it would have been beneficial to have worked more closely with the consultancy team, not least in the sharing of data sets.
- Due to safety concerns, bus drivers were not willing to do home visits alone.
- Personnel changes within the client team meant it was difficult to maintain momentum and support for the project internally within the authorities.
- There was no clear project champion/member buy-in to disseminate the findings at a political level.
- The client group had some concerns as to how the control group had been determined, and whether they would be influenced by the wider public transport improvements in place across the city (i.e. the tram network). In which case it would have been expected that the control group would have decreased car use similarly to target area, but what was reported was a slight increase in control group car use, and accounting for this helped to amplify car use reduction due to PTP. Note: Sustrans/Socialdata had no recollection of this concern being voiced at the time. In their view, the control group was drawn at random from across the rest of Nottingham. The sample size was sufficient to ensure statistical validity of the results. It is likely that any reductions in car use resulting from improvements in public transport during the project period were concentrated locally and would not be measurable at a city-wide level.
- There were concerns within the client group over the time of year of the ‘before’ and ‘after’ surveys (Note: the timetable was constrained by the funding period, and was agreed by the steering group at the inception stage).
• Changes to train time after the printing deadline meant that this information was excluded from the information packs.

• There were some delays in turning around the proofing of bus timetable material.

• The maps were produced in house by the GIS team (and printed in-house), which was both time consuming, and at times, stressful (for the client project manager) as turnaround times were very short.

**Lessons learned**

9.38 The client project manager found the year-long study to be both stimulating and enjoyable. It took approximately 50% of her time over the 12-month period (100% of her time during the intensive periods of producing individualised plans and preparing marketing material. The key lessons learnt were the need to:

• ensure the bus operator is fully subscribed to the process, and can offer a degree of certainty that timetables will not change during the study period and that they have the resources to check timetable information thoroughly;

• ensure a robust approach to producing the plans is adopted (some form of automated journey planner);

• ensure the consultancy contract includes for the full sharing of all data such that quality checks on data can be undertaken and follow-up work can be undertaken with the target audience (for example, sending out new bus timetables when changes to the network occur);

• understand that PTP might only ever be part of the solutions, and that trying to disaggregate the impact of PTP from other influences is unlikely to be easy or certain;

• undertake a risk assessment (by the client group), particularly for the on-site travel advisory components;

• consider the setting of behavioural goals for participants, and linking this potentially to other sectors (for example a carbon footprint league table or health improvement scheme);

• ensure consistency within the client team, and for a clearly defined project champion to be given the remit to challenge the study and disseminate findings.

9.39 The client project manager would consider a PTP project in the future, but would consider it as a complementary measure, possibly as part of an overall mobility management strategy. In particular, the differences of impact between the different targeted areas provided an interesting insight into travel behaviour change that have subsequently been used when developing future PTP projects – in essence, the more affluent stable communities in Lady Bay showed more positive modal shift (away from the car), compared to the more difficult to reach, transient population within the Meadows.
9.40 In the final officer report to city council members, the following recommendations were made:

- Our experience has shown there are three key areas for a successful project:

**Good communications/project management:**
- A core project team representing each of the partners is essential. Need consistent membership and leadership to ensure continuity, enthusiasm and commitment – too many changes of key project staff can be detrimental to the progress and follow-on of the project.
- Don’t have too many layers of organisation, as this can create communication problems. Where this is unavoidable, need clarity about the role of the individual project partners, so that problems can be resolved quickly.
- Need regular contact with and feedback from the consultants managing the project.
- Close liaison with the public transport operators helps to balance any conflicts between the project’s information requirements and the commercial requirements of changing timetables/bus services. Also need to ensure there is a system for updating the target population of these changes which complies data protection requirements.

**Links to other local programmes and strategies:**
- Senior management commitment is essential.
- Need good links to and compatibility with the TravelSmart approach and wider transport marketing strategies operating within the project area to make best use of staff resources and to co-ordinate information and marketing materials.
- Support/involvement of elected members is desirable but not essential.

**Resources:**
- Realistic timetable and adequate staff resources to produce materials and information – this aspect is fundamental and can take longer than anticipated in order to produce high-quality materials.
- Use of bus drivers to deliver the public transport home visits, although desirable, may not always be practical if the appointment times convenient for households do not fit in with the drivers’ shift patterns. In Nottingham some of these visits had to be made by the bus companies’ marketing staff instead. This would not be a workable alternative if the project operated on a larger scale.
Other general issues

9.41 The client project manager stressed the importance of good project management skills when delivering a PTP project, and, in particular, the need to manage diverse consultancy teams. She also felt that other transport initiatives are currently being implemented which could be dressed up as PTP, for example offering tailored advice at university fresher fairs, or drop-in travel centres, and more could be learned from how these operate.
10. Nottingham Number 30 pilot

10.1 Interviewees:
- Andy Gibbons (Nottingham City Council).

General background

10.2 In 2006, Nottingham City Council launched a pilot PTP study, focused on a section of the Number 30 bus route, serving Wollaton. The pilot involved the issuing of 2,130 free day passes, and a ‘how to’ guide to public transport to residents within 500 metres of the Number 30 service.

10.3 The aim of the pilot was: ‘To test the hypothesis that given high quality, personalised travel information and a smartcard preloaded with one day’s free travel, non users could be encouraged to try the bus for the first time and existing users could be encouraged to travel more.’

10.4 In advance of the pilot, Nottingham already has a strong city-wide public transport network, is in the highest-performing cities in relation to public satisfaction with bus services and bus information, and has an integrated ticketing system that makes cross-city travel relatively straightforward.

10.5 The Number 30 service was identified for the pilot as:
- it demonstrated stable if slightly declining passenger numbers for the section of route selected for the promotion;
- there are no other routes in direct competition;
- the route accesses the heart of the city centre with a reasonable level of frequency throughout the day (15 min peak, 30 min off peak);
- there is a wide spread of demographic groups along the route; and
- vehicles operating along this route all feature smartcard readers, allowing detailed tracking of respondents.

10.6 The pilot used the TripTimes journey planner, an electronic planner developed specifically for Nottingham, offering greater accuracy than TravelLine. It was also possible to adapt TripTimes (a local IT consultant undertook the development), to enable batch processing based upon postcode data.

10.7 The smartcards with a free day’s network travel and personal journey planners were distributed by post, personally addressed (an up-to-date address list was provided by Experian). The personalised information included a stop-based timetable from the user’s nearest bus stop to home and the return times from a central point in the city centre. It also included information on how to use electronic journey planners via the internet and mobile phone. Figure 10.1 shows a sample leaflet for the service.
10. Nottingham Number 30 pilot

Costs

10.8 The pilot cost £3.75 per pass issued, with a total cost of £47 per passenger trip generated (Note: These costs related only to the use of the free pass and include the free day’s travel).

Impact and effectiveness

10.9 The pilot proved a success. After six months, patronage had grown by 5.5% on a year-on-year basis. Ticket revenue increased by 5%, and this excluded the subsequently reimbursed free days of travel used. Most of the revenue growth has so far come from cash sales, rather than subsequent smartcard top-ups.

10.10 This excludes any additional growth identified separately for concessionary fares and the increase in child use of the service (these were identified through an analysis of the smartcard data, which enables the segmentation of these trip types to be achieved).

10.11 In conclusion, both trips and revenue had significantly increased – the trial didn’t just lead to a substitution of payment methods by existing regular travellers and there is long-term sustained repeat travel by new users.

10.12 Figure 10.2 shows the graph of patronage both before and after the intervention.

Figure 10.1: Sample leaflet for the Nottingham service

Figure 10.2: ‘Before’ and ‘after’ patronage graph
10.13 The pilot also demonstrated an increase in bus use outside of the peak hours, as shown on Figure 10.3, suggesting that at least 50% of the trips were made for leisure purposes in the off-peak period.

**Figure 10.3: Travel distribution by time**

<table>
<thead>
<tr>
<th>Timeband</th>
<th>0</th>
<th>20</th>
<th>40</th>
<th>60</th>
<th>80</th>
<th>100</th>
<th>120</th>
<th>140</th>
<th>160</th>
<th>180</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;07:30</td>
<td></td>
<td>10</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>07:30-09:30</td>
<td>20</td>
<td></td>
<td>40</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>09:30-16:00</td>
<td>80</td>
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<td>16:00-18:00</td>
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<td></td>
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<td>100</td>
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<td>18:00&gt;</td>
<td>40</td>
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<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10.14 This was seen as important by the bus operator (Nottingham City Transport), as it enables the growth to be serviced where there is no the need for additional capacity to be provided. It also accorded directly with the bus operator’s ambition to grow the market in these areas.

10.15 A further follow-up postal questionnaire will be carried out in 2007.

10.16 The extent of the targeted network is shown in Figures 10.4 and 10.5, with each postcode areas targeted colour-coded according to its MOSAIC profile.
The uptake in the usage of cards was roughly consistent across all MOSAIC groups, as shown in Figure 10.6.
### Figure 10.6: Distribution of card use uptake

<table>
<thead>
<tr>
<th>Category</th>
<th>Cards sent out</th>
<th>Cards used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Symbols of Success</td>
<td>35%</td>
<td>31%</td>
</tr>
<tr>
<td>Suburban Comfort</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>Ties of Community</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Welfare Borderline</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Municipal Dependency</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Blue Collar Enterprise</td>
<td>3.5%</td>
<td>3.1%</td>
</tr>
<tr>
<td>Twilight Subsistence</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Grey Perspectives</td>
<td>18%</td>
<td>18%</td>
</tr>
</tbody>
</table>
Lessons learned

10.18 The Number 30 pilot has been a great success, with the following summarising the key factors:

- a good-quality existing bus network on which to deliver PTP;
- a genuine partnership between the bus operator and local authority;
- the development of the automated journey planner which enabled the batch processing of information to stop-level based upon postcodes in the defined area;
- the personalised nature of the household contact (including named contacts on the address for each letter);
- the introduction of smart ticketing, which enabled the one-day passes to be identified separately from growth associated with other factors (especially concessionary fares and child fares growth);
- the ability to deliver the project quickly, to ensure journey plan and service details were up to date;
- cost-effective approach – quick to repeat/update and easily ‘scalable’ across the whole of the city.
11. Nottingham Citycard

11.1 Interviewees:
• Andy Gibbons (Nottingham City Council).

General background

11.2 Based upon the success of the Number 30 pilot, Nottingham City Council (NCC) have launched a city-wide smartcard – the Citycard – which will provide a platform for public transport use, library and leisure access. The card was issued to 120,000 adults during May 2007, and included:
• a personal journey planner to/from the city centre;
• one day of free bus travel on a reusable smartcard chip.

11.3 Approximately 25% of the city residents (40,000) could not be contacted in the first instance, as they were not on the electoral roll (the timing was appropriate, as the electoral roll was up to date, with the local elections due on 7 May 2007). Those not receiving the card can apply directly for the information (anticipated that some word of mouth growth will occur in due course).

11.4 The journey planners have been developed by the city council (see Appendix 11A), and use the TripTimes database as the main information hub, supported by locally developed travel algorithms (these were created by the head of maths at Nottingham University).

11.5 The printing and mailing of the journey planners has been outsourced to a local company. Three local authority officers and an external IT consultant have been working on the project full time, and the project has been completed in just 6–8 months.

Costs

11.6 The total cost of the project is £400,000 (of which around £200,000 has been spent on developing the TripTimes system for wider PT planning functions, including the interactive planner on the city council website). It is also important to recognise that this includes a much wider range of benefits (library and leisure access, and future smartcard applications such as city car club membership).

11.7 The costs were funded through a mix of Local Transport Plan (LTP) capital and successful capital and revenue bids to East Midlands Development Agency and the Greater Nottingham Transport Partnership.

11.8 The cost of providing the smartcard is calculated at £1.74 per card. This provides an ITSO compliant contactless 4k smartcard, capable of storing an e-purse and a host of long-term city functions. Providing transport advice and ticket sales on this platform is considered to be a significant benefit to Nottingham travellers (currently applies to all Nottingham City Transport travel).
11.9 On-going costs are estimated at £30,000 per year (new smartcards, staff time etc.), as NCC will have e-mail addresses for existing ones, enabling cheap yearly information updates.

Impact and effectiveness

11.10 NCC have estimated that this approach will yield a 3% increase in PT trips for all residents served by less frequent routes (every 15 minutes or worse), and a 0.7% increase in trips for those served by high-frequency routes. This would result in an increase in PT trips of over 1 million each year.

11.11 Over a 10 year period, the project would therefore amount to a subsidy of £0.08 per trip generated. In addition, NCC will gain valuable monitoring data as a result of developing a 'smart' system.

11.12 Whilst it is too early to measure the impact at the time of writing this case study report, so far over 30,000 cards have been used and over 500 subsequently topped up with further travel by the resident. Over 5,000 residents have registered online – making it much cheaper to carry out subsequent promotions.

Lessons learned

11.13 In developing the Citycard and associated PTP (bus) advice, the following issues are deemed important:

- the need for a good-quality, co-ordinated (and affordable) bus network;
- the need for stability in the public transport network and/or a fast turnaround time for the production of personalised information;
- high levels of public transport reliability and satisfaction (services and information);
- a wider range of functions capable of being loaded onto the smartcard platform (to ensure cost-effectiveness and sustainability);
- the need to cover a wide and extensive population (to maximise exposure and create momentum);
- the need for automation in the journey planning, printing and posting process;
- the need for easy, remote, cheap updating via email or SMS.
Other general issues

11.14 The Nottingham scheme is the first of its kind in the UK to distribute targeted public transport information to such a broad population, alongside the introduction of smartcard ticketing. As such, it has a number of interesting characteristics of relevance to the Making PTP Work study, namely:

- The need for those receiving the smartcard to register if they want to benefit from subsequent planned promotions – either online or by phone. This immediately creates a means of communication, and should create a longer-term buy-in. It will also enable the city council to re-issue personal journey planners as the bus network changes, or when events affect the network.

- The use made of the home information pack, and the services of the Nottingham ‘searches team’ – integrating the contact database ensures all new residents, and house movers, receive a personal journey planner each time they move.

- The use of real-time and WAP mobile phone communication to further increase confidence.

- The ambition to tackle the whole city, combined with the practical issues associated with accessing address-based information (accepting an initial 25% ‘non contactable’ but ensuring the communications processes and word of mouth/publicity campaign encourage those not contactable to register interest).

- A fast turnaround in the provision of information. The entire project only took 6–8 months to complete, and the issuing of journey planners (in bulk) can be processed and delivered in a matter of days.
Appendix 11A: Example information for Citycard
Your personal travel plan

This is your personalised travel pack – we’ve included everything you need to use the bus.

Mobile timetable
Alternatively, you can use the City Centre Timetable mobile app on your smartphone.

Pocket timetable
For your pocket-sized pocket timetable, please visit www.citycentre-timetables.com.

To the City Centre
from stop ‘Parkdale Road’ on Oakdale Road, stop code BF16
Service 23 departs at the following times and takes about 17 minutes to the City Centre

<table>
<thead>
<tr>
<th>Monday - Friday</th>
<th>Saturday</th>
<th>Sunday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5:46</td>
<td>5:46</td>
<td>7:46</td>
</tr>
<tr>
<td>away</td>
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<td>6:25</td>
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<tr>
<td>12:25</td>
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</tr>
</tbody>
</table>

Please turn over for journeys back from the City Centre.
**Adult Citycard travel area**

You can use your Citycard on any NCT bus within the area shown below.

---

**From the City Centre**

Stop Victoria Centre on Lower Parliament Street, stop code W3

<table>
<thead>
<tr>
<th>Monday - Friday</th>
<th>Saturday</th>
<th>Sunday</th>
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</thead>
<tbody>
<tr>
<td></td>
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</tr>
<tr>
<td>10:00</td>
<td>10:20</td>
<td>every 10 mins</td>
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<td>10:20</td>
<td>10:40</td>
<td>every 10 mins</td>
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<td>11:40</td>
<td>11:50</td>
<td>every 10 mins</td>
</tr>
<tr>
<td>11:50</td>
<td>12:00</td>
<td>every 10 mins</td>
</tr>
</tbody>
</table>

Please turn over for journeys from your home.
12. Perth (Western Australia) PTP

12.1 Interviewees:
- Colin Ashton Graham (Government of Western Australia);
- Gary John (Government of Western Australia).

General background

12.2 The Government of Western Australia (GOWA) has 10 years’ experience of delivering Personal Travel Planning (PTP) programmes in Perth, most notably in the field of residential PTP, where 18 projects have been successfully delivered, covering a total population of 284,000 to date. The full programme is scheduled to target 450,000 residents by the end of 2008. Perth have tried and tested different approaches to the delivery of PTP and implemented different evaluation processes for the PTP interventions. The residential PTP programme is managed by staff at the Department for Planning and Infrastructure, through a full-time team of five staff. In addition to the residential PTP component, the travel behaviour change programme (known as TravelSmart) also includes school and workplace travel planning.

12.3 Each of the projects undertaken to date is supported by a detailed project report, which is publicly available (www.dpi.wa.gov.au/travelsmart). Hence, for this case study we have elected to summarise the headline results and project characteristics, and followed this with a review of the key issues arising from the direct discussion with officers of the Department for Planning and Infrastructure (Western Australia) who have led the project programme.

12.4 Perth is a heavily car-dependent city, with approximately 75% of all trips made by car. The city has a total population of 1.5 million, covering 30 local government areas (ranging from 2,000 to 180,000 residents in each).

12.5 Whist the central business district is compact, the surrounding areas are characterised by low-density suburban living. Within each suburb, local retail and employment centres are generally dominated by generous on-site parking provision. Research carried out prior to implementation of the PTP programme demonstrated that only 39% of trips are constrained by the car, whilst 20% are undertaken by sustainable modes. Hence, the remaining trips (41%), defined as having subjective barriers, are considered as potential for changing from the car to sustainable modes.

12.6 The PTP programme involves many stakeholders, including most notably:
- state government (Department for Infrastructure and Planning, Department of Environment and Conservation and Public Transport Authority);
- private sector (bus operators);
• Australian government (Australian Greenhouse Office);
• local government.

Targets and objectives

12.7 The aim of the PTP programme is to offer households targeted, local and specific information to assist them in adopting sustainable travel behaviour, with a target to reduce vehicle kilometres travelled. Specifically, it seeks to build individual capacity to change trips by providing information that is relevant to the individual, encourages people to try alternatives, and empowers people to explore their local community. The process works by addressing information barriers, providing motivation and assisting with experience – it is about empowering and not simply advertising. Figure 12.1 depicts the relationship between a TravelSmart project and other sectors of transport policy and delivery.

Figure 12.1: TravelSmart relationship with other sectors of transport policy and delivery
Sociological behavioural theories/behavioural underpinning

12.8 Whilst Perth has generally adopted the IndiMark process, they have remained engaged with all aspects of the delivery process, working closely with Socialdata on developing the product to meet local needs.

12.9 In summary the process is as follows:

- pre-intervention random sample survey (establishing the background characteristics of the population and baseline travel behaviours);
- collation of information material to support project;
- staff recruitment and training;
- home contact database established (combined from several sources including rate-payers database and telephone directory);
- pre-intervention letter, signed by local mayor, setting out the project details, and pre-warning residents to expect a phone call, supported by area-wide publicity campaign;
- participants contacted by phone, travel behaviour discussed, and invited to participate in programme;
- segmentation based upon willingness to participate and/or requirements for motivation/information (in accordance with IndiMark principles);
- those identified as receptive to change are invited to request materials (see Figures 12.2, 12.3 and 12.5). These, along with gifts (including rewards for those already travelling sustainably), are hand-delivered using a bike and trailer to households, supported by home visits where appropriate (bus drivers for public transport related issues, trained cycle advisors for cycle component);
- post-implementation survey to assess behavioural change (using the self administered mail back survey technique KONTIV®);
- collection of validation data from public transport ticketing systems.

12.10 The segmentation of the target audience is an important component, enabling the targeted delivery of appropriate tools (printed material or home visits/advice), which in turn ensures the project focuses upon the area of most potential, and thus reduces total project costs (i.e. time and effort is not wasted on those defined as non receptive).
Marketing and promotion

12.11 The use of merchandise to support TravelSmart has been reviewed to ensure that this cost component is minimised. Merchandise costs per person have been reduced since the demonstration projects carried out in 2000 and now represent approximately 4% of the project cost. Each merchandise item deployed has a clear function in the context of Community Based Social Marketing:

- the bags provide a practical aid to environmentally responsible shopping behaviours: they replace plastic bags and prompt the householder to walk for local shopping trips;
- the key chain carries a direct message at ‘point of decision’ (on the car key) to remind the householder that some trips may be possible without the car;
- the water bottle is a practical aid to walking and cycling; it provides motivation to engage in these activities;
- the coffee mug, perhaps the most curious of the merchandise deployed, provides ‘point of decision’ information at the breakfast table. A resident who chooses the car for the first trip of the day will probably use it for all trips that day, where a resident who chooses an alternative may well not drive at all that day.

12.12 The merchandise items are targeted at households interested in change and are selected to match the particular travel option of interest to the household. Each household will receive only some of the products on offer, resulting in a cost for merchandise of less than AUS$1.50 per target person in the project area.
Costs

12.13 The costs to deliver the PTP programme to 450,000 residents over eight years (including the forecast spend on the next phase of the project) is in the order of AUS$15 million (AUS$10 million on delivered projects to date). Of this, the following summarises the broad breakdown of costs:

- AUS$2 million to support the rail infrastructure project (Mandurah – Perth);
- AUS$3 million from National Government (Greenhouse Office);
- AUS$8.5 million from State Government (Western Australia);
- AUS$1.5 million from local councils.

12.14 This is considered an investment (rather than simply a cost outlay), with the general view that this is small compared to the effectiveness of the process. For example, the AUS$2 million for the PTP component of the rail infrastructure project compares to AUS$1.6 billion of rail project overall, and somewhere in the order of AUS$1.3 billion per annum for road and public transport investment overall. Table 12.1 shows the cost distribution for the project.
Table 12.1: Perth cost distribution

<table>
<thead>
<tr>
<th>Element</th>
<th>Cost (%)</th>
<th>Role</th>
<th>Impact/Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media ads/poster</td>
<td>0.5</td>
<td>Awareness of the phone call</td>
<td>General awareness</td>
</tr>
<tr>
<td>Announcement letter</td>
<td>0.5</td>
<td>Awareness and legitimacy</td>
<td>Increases contact (dialogue) from 20% recruitment rate in cold call methodology to 80% in TravelSmart</td>
</tr>
<tr>
<td>Personal contact</td>
<td>30</td>
<td>Market segmentation and counselling</td>
<td>Converts 50% of households into active participation (social contract to act)</td>
</tr>
<tr>
<td>Service sheet</td>
<td>5</td>
<td>Empowers customer to select services</td>
<td>Reduces demand for materials to 30% of the total information product range. Cuts wastage</td>
</tr>
<tr>
<td>Personal delivery (by bike)</td>
<td>12</td>
<td>Leadership and counselling</td>
<td>Efficient process, includes counselling</td>
</tr>
<tr>
<td>Follow up call and home visits (as required)</td>
<td>12</td>
<td>Social contract/commitment</td>
<td>Motivates residents to act on the information provided</td>
</tr>
<tr>
<td>Information materials (map, fares guide, local timetable)</td>
<td>5</td>
<td>Information/knowledge</td>
<td>Essential to overcome barriers such as not knowing where/when bus services run</td>
</tr>
<tr>
<td>Bus modules</td>
<td>11</td>
<td>Knowledge and norm setting</td>
<td>Provides relevant information at point of decision</td>
</tr>
<tr>
<td>Delivery bag/backpack</td>
<td>2</td>
<td>Norm setting and a practical aid</td>
<td>Use creates awareness of TravelSmart as a normal activity</td>
</tr>
<tr>
<td>Bottle/mug/keychain/note pad</td>
<td>2</td>
<td>Prompts to repeat action</td>
<td>Presence reminds residents to keep exercising the choice to not drive some trips</td>
</tr>
<tr>
<td>Test ticket</td>
<td>0</td>
<td>Experience of the behaviour (several times)</td>
<td>Gives new users the opportunity to test the options and find the best service</td>
</tr>
<tr>
<td>Surveys</td>
<td>15</td>
<td>Provide feedback to the Federal and Local Government investors in the program</td>
<td>Measured 10% reduction in car use</td>
</tr>
<tr>
<td>Staffing</td>
<td>5</td>
<td>Scope local information</td>
<td>Localised information products</td>
</tr>
</tbody>
</table>
Evaluation

12.15 As a pioneer of PTP, Perth has been the subject of much rigour and academic debate regarding the methods of evaluation. The state government has tried and tested different approaches, including:

- internal evaluation procedures with the evaluation and intervention undertaken by Socialdata;
- external evaluation procedures, with Socialdata undertaking the intervention, and external data collection organisations undertaking the travel surveys;
- external auditors to independently assess the Socialdata findings;
- the use of corroborative data (primarily bus boardings).

12.16 Through this extensive approach, Perth has learned a great deal about the evaluation process and how best to monitor behavioural change. In particular, it is clear from their experience that the choice of evaluation tools and processes can have an impact on the stated effectiveness, and hence it is important that the evaluation process itself is robust and defensible.

12.17 The views of the Perth practitioners are as follows:

- Response rates are crucial (more so than sample sizes), as achieving high response rates is the only effective way of ensuring the ‘before’ and ‘after’ surveys cover a broad spectrum of each of the different segments of participants. When undertaking the independent evaluations, this was a major issue, as 20% (net panel after) response rates were achieved, and hence it was not possible to determine whether these predominantly represented individuals most (or least) responsive to making travel changes. This issue became apparent on examination of control group panels where large and illogical behaviour changes were reported from the survey design.

- Whilst a panel survey can be adopted, the main source of evaluation data should be taken from before/after cross sectional surveys, with a representative mix of respondents (sample frame) that matches the segmented groups associated with the intervention. This is because panel surveys compound non-response bias and can (if poorly designed) measure adaptation to the survey instrument itself.

- Corroborative data should form an important component, as these should substantiate the claims of the survey findings and add full year and ongoing data at low cost.

- Surveys should be simple to complete (user focus), and should not place a burden on participants.

- Surveys should be taken six months before and six months after implementation to allow time for behaviour changes to emerge and to minimise seasonal impacts.
Impact and effectiveness

12.18 A combined dataset of more than 6,000 households and 48,000 trips has been drawn from surveys across seven project areas (with common survey design) where a target population of 128,000 residents was engaged. These programme level results provide increased statistical confidence and the opportunity to explore behaviour changes by trip characteristics and demographics. The results can be summarised as shown in Table 12.2.

Table 12.2: Programme results for Perth

<table>
<thead>
<tr>
<th></th>
<th>%</th>
<th>Person/year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car trips</td>
<td>-10</td>
<td>-69</td>
</tr>
<tr>
<td>Car kilometres</td>
<td>-13</td>
<td>-688</td>
</tr>
<tr>
<td>Walking trips</td>
<td>+26</td>
<td>+34</td>
</tr>
<tr>
<td>Bike trips</td>
<td>+52</td>
<td>+12</td>
</tr>
<tr>
<td>PT trips</td>
<td>+15</td>
<td>+11</td>
</tr>
<tr>
<td>Car passenger (sharing)</td>
<td>–</td>
<td>+3</td>
</tr>
<tr>
<td>Trip reduction (combining tasks)</td>
<td>–</td>
<td>-11</td>
</tr>
</tbody>
</table>

12.19 For individual residents, this means that they will make, on average, each month:

- 6 fewer car trips;
- 3 extra walk trips;
- 1 extra bike trip;
- 1 extra public transport trip;
- 1.5 hours more physical activity.

12.20 Each household taking an active part in the programme saves AUS$500 per annum in car running costs.

12.21 The combined community benefits from all projects (284,000 residents) completed to date are (per annum):

- 20 million fewer car trips;
- 200 million fewer car kilometres;
- 60,000 tonnes less greenhouse gases;
- extra 2.6 million public transport boardings;
- 5 million hours of physical activity;
- 20 million fewer litres of fuel (a saving of AUS$25 million).
12.22 In addition to the evaluation process undertaken through the PTP programme (see below), corroborative data has been taken from bus boardings. The results of this are shown in Figure 12.4.

Figure 12.4: Bus passenger totals for bus routes in the city of Cambridge

12.23 This shows sustained growth even four years after the implementation. It is important to note that these figures are taken from a group of services (28, 81, 84, 85, 91, 92, 95 and 401), which have remained consistent (quality, timetable, reliability) throughout the intervention period. These services also run from the city centre to the coast, and hence have not been influenced by outlying development. These results are also matched by customer satisfaction with public transport, which has seen rises from 31% satisfied before, to 48% satisfied after, and by comments received by the authority from customers of the PTP programme.
The evaluation also assessed the impact on mobility, concluding that the reduction in car driver trips had no negative impact on overall mobility (i.e. respondents were undertaking a similar number of trips/activities, travelling similar distances and for similar time periods before and after implementation).

### Site selection process

Perth have researched the relationship between geographic characteristics and effectiveness of PTP, in order to target future programmes towards areas likely to achieve the greatest success. This has taken account of an area’s ‘measure of transit oriented development’ (TOD), a process of assigning a score to an area for each of the following characteristics:

- permeable – with options for car, bus, train, walk and cycle;
- variety – range of issues/services for a range of people;
- legible – layout is easy for people to understand and orientate themselves;
- robustness – degree to which people can use a given place for different purposes;
- visual appropriateness – extent to which the appearance of a place makes people aware of the choices available;
- richness – wide choice of sensory experiences;
- personalisation – extent to which people are able to put their own stamp on a place.
12.26 In essence, Perth have scored the areas where PTP have been delivered to date for each of the above categories (on a score of -3 to +3), combined the scores to provide a total for each area (the measure of TOD), and then related this to PTP effectiveness. The outcome of this is shown in Table 12.3.

<table>
<thead>
<tr>
<th>Project area</th>
<th>TOD measure</th>
<th>Impact of PTP</th>
<th>Car trip reduction (%)</th>
<th>Number of car trip reduction (trips per person per year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subiaco</td>
<td>+2.6</td>
<td>-12</td>
<td>-80</td>
<td></td>
</tr>
<tr>
<td>Fremantle</td>
<td>+1.4</td>
<td>-12</td>
<td>-72</td>
<td></td>
</tr>
<tr>
<td>Vincent</td>
<td>+1.4</td>
<td>-9</td>
<td>-57</td>
<td></td>
</tr>
<tr>
<td>Melville</td>
<td>+0.6</td>
<td>-12</td>
<td>-94</td>
<td></td>
</tr>
<tr>
<td>Marangaroo</td>
<td>-1.2</td>
<td>-4</td>
<td>-26</td>
<td></td>
</tr>
<tr>
<td>Armadale</td>
<td>-1.6</td>
<td>-9</td>
<td>-53</td>
<td></td>
</tr>
</tbody>
</table>

12.27 In general, the high TOD areas have greater car trip reduction than the lower TOD areas (Note: This is not completely uniform). PTP is generally considered more effective in inner and middle suburbs where there are good public transport, walking and cycling facilities and many local destinations (e.g. local shops and employment). Perth accept that more work is required in this area, but it sets a good starting point for establishing the basis of the most fertile grounds for PTP effectiveness.

12.28 Perth have also carried out research into the comparative effectiveness of unsolicited travel advice (for example, new timetables issued by bus companies during the launch of a new service), with PTP. In general, the unsolicited approach achieves a 5–10% response rate and limited behaviour change, compared to active PTP (i.e. the impact of three phone calls), which achieves a 50% response (participation) rate.

Lessons learned

12.29 The following summarises some of the issues identified by the Department for Planning and Infrastructure officers as being important when considering a PTP programme (practical issues relating to implementation).

- Use corroborative data wherever possible to substantiate evaluation process (in particular bus boardings), and ensure the corroborative data, where possible, is independent of other changes (for example population growth, network improvements, fare changes).
• It is important to remain soft on participants (they should be seeking the advice through the programme). This is particularly important when considering sensitivities associated with health or obesity benefits associated with walking and cycling and with value judgements associated with money or the environment.

• It is important to use bus staff and local rangers (community wardens) to give input to the information provided (for example when scoping out the detail of the local access guides/maps).

• It is important that survey companies are vigorous in their approach and achieve high response rates (at least 50%, ideally towards 80%), as, without this, it is very difficult to associate any change in travel behaviour to the intervention.

• One of the successes of the surveys in Perth has been the determination of Socialdata to work with respondents – i.e. several phone calls during the process to encourage and motivate to complete the mail-back travel diary.

• Maintain control over the information packs/local access guides. Whilst these can be outsourced for printing, it is important that project officers are directly involved in producing the background material and apply sound Community Based Social Marketing principles to their content and design.

• It is important to undertake validation checks on survey data (for example to make sure travel times/distances are realistic and households have correctly interpreted questions relating to car use), and to follow this up directly with respondents (by phone) to check interpretations and amend if necessary.

• Approach all cycle shops in the area with a basic offer to be involved (i.e. offer a 10% discount), but then offer a blind bid to cycle shops if they want to propose a more generous offer.

• Prompts and rewards – it is important to ensure they all relate to sustainable travel, and in this respect Perth have tried to get inside the head of the traveller and intercept at all stages of the journey (e.g. branded mug to gain attention first thing in the morning, car fob to remind when keys are picked up).

• To ensure the initial contact letter is signed by a local high-level politician (the mayor in the case of Perth councils).

• Support the introductory letter with a wider publicity launch to raise awareness (e.g. posters, newspaper ads, radio interviews).

• Develop a memorandum of understanding with project partners from the outset, clearly setting out the relative roles and responsibilities.

• Deal with whole suburbs, irrespective of local accessibility issues (a function of streamlining the database management process and to ensure clear communication in building expectations amongst residents).
• Ensure an oversupply of information material is produced and available in advance of launch (validated by project partners). This can always be used at the end of the project through mobile travel cafés to reinforce the message and capture those that haven’t been engaged through the process.

• Undertake regular visits to the operation call centre, talk to the operations staff, and hear first hand the dialogue taking place and examine systems that are in place for tracing information flows.

• Invite local councillors to attend, and create wider visits to stimulate interest in the project and engage support. Perth invited their councillors to attend on a hydrogen bus, enabling them to demonstrate the broader sustainable transport message embedded within.

• Insist on access to key evaluation data, disaggregated to a format that suits internal auditing needs.

• Establish regular project meetings, both internally and with the consultancy partner, so all members of the project team feel fully engaged.

• Provide guidance notes and training for staff undertaking home visits, particularly bus drivers who may not be aware of what to expect or how to respond to different situations.

• All staff undertaking home visits must be police-checked.

• Create a detailed project plan, clearly setting out tasks, inter-relationships and roles and responsibilities.

• Keep the information request sheet to a minimum (don’t be tempted to offer too much, as this results in less active engagement). The Perth experience is that the local access guide and bus-stop-specific timetables are the most popular and relevant to meeting user needs.

• Focus communications on the primary barriers and benefits of each behaviour change, i.e.:
  – awareness of local services;
  – knowledge of public transport routes, timetables and travel durations;
  – motivation to try new options;
  – understanding of travel times.

• And put less emphasis on:
  – environmental contribution;
  – financial savings;
  – health benefits.
Other general issues

12.30 The discussions with the officers from the Department for Planning and Infrastructure raised a number of key issues relevant to the *Making PTP Work* study. These are summarised as follows.

- PTP has been effectively proven within Perth and is seen across all sectors of local and national government as offering good value for money (cost–benefit ratio somewhere in the order of 10:1 and up to 30:1 with potential health benefits included).

- The client must be engaged, and prepared to work with the consultancy partner on the delivery process. This includes visits to the field offices, challenges to reported data, and most importantly to be confident in the outcome results.

- The lead project partner must engage with the stakeholders necessary to make the project a success (local councils, bus operators, service providers etc.). This has to be more than ‘lip service’ and should seek to use different mechanisms to ensure the partnership is active throughout the project.

- Test different evaluation processes and implementation models, and in particular consider the use of an independent auditor to allay concerns over the independence of findings (Perth employed Konstadinos Goulias to review the evaluation findings, who at the time was the Director of the Mid-Atlantic University Transportation Centre at Pennsylvania State University and the chair of the Committee on Traveller Behaviour and Values of the Transportation Research Board USA).

- There has only been limited ‘broad reach media’ associated with the PTP programme, largely as a result of the significant political focus upon transport infrastructure projects.

- It is important to segment by trip and not by person.

- To introduce competition, large-scale projects could consider a panel approach, with multi-consultancy frameworks (this is the case in Perth, although, to date, Socialdata are the only successful consultancy appointed from the panel). Perth award contracts on the basis of quality, performance and a fixed rate per targeted person.

- From a local political perspective, PTP is a positive tool, not least as it can be delivered rapidly (i.e. seen to be delivering), and has clear visible outcomes within a community. It also provides good data and support for presentations and speeches by local politicians, and there has been no community opposition to TravelSmart and less than one complaint per 10,000 targeted persons approached.
• Consider the value PTP can bring to new movers – once a programme has been delivered in the area, and the resources are available, then it should be relatively straightforward to ensure all new movers are covered by PTP. In some councils in Perth, this is done by a local ranger who visits new movers within the community (appointed by the local authority), who ensures PTP advice is included within the welcome pack and introductions. Developers also host community building events in new land developments during the construction phase.

• PTP relating to transport issues in Perth has generally achieved around a 50% engagement rate with households (i.e. willing to accept information). A similar exercise for energy management has demonstrated acceptance rates of around 80%, and hence it is worth considering pooling programmes to piggy-back on other areas of environmental improvement.
13. Brisbane (Queensland) PTP

13.1 Interviewees:
- Bruce James (Queensland Government);
- Doug Woodbury (Brisbane City Council);
- Alton Twine (Brisbane City Council);
- Graham Lunney (Queensland Government);
- Syd Jerram (Noosa Council);
- Nigel Walker (Noosa Council).

General background

13.2 Brisbane has a strong history in the successful delivery of residential PTP programmes (Figure 13.1), building upon early work undertaken in Perth and local small-scale pilot programmes.

13.3 Based on the success of studies in Perth using Individualised Marketing (IndiMark) undertaken between 1997 and 2001, Queensland Transport trialled a pilot of the TravelSmart communities programme in the Brisbane suburb of the Grange. The project ran from May to November 2001, and used the (IndiMark) technique developed by Socialdata Australia.

13.4 This was the first successful application in Queensland of voluntary travel behaviour change techniques, and achieved a meaningful, demonstrable shift to environmentally-friendly modes of travel. The pilot was conceived by Queensland Transport originally to test options for educating local populations in greenhouse gases and other urban pollutants in the transport system. It achieved a whole range of government and agency outcomes across the environment, demand management, transport, health and education sectors.

13.5 The major partner to Queensland Transport was Brisbane City Council, but it also involved the participation of: QR Citytrain, Brisbane Transport, Bicycle Queensland, private bicycle shops and the Heart Foundation.
Over 450 households in the inner northern suburbs of Brisbane participated, and the key results were:

- walking increased 16%;
- cycling increased 6%;
- public transport use increased 33%;
- car as driver trips decreased 10%;
- car as passenger trips decreased 5%;
- vehicle kilometres travelled decreased 10%.

The total project costs were planned at AUS$247,000, of which the key components were estimated at:

- AUS$57,000 on-costed salaries for Queensland Transport and Brisbane City Council officers to project manage and support the pilot;
- AUS$165,000 consultancy fees for Socialdata Australia; and
- AUS$25,000 in project materials.

The final project costs were AUS$272,000. Consultancy costs remained at AUS$165,000, while materials came in slightly below the original estimate at only AUS$22,000. The major increase was for extra salaries as a result of the extended project completion date and the need to report many presentations in a second round.

Whilst the delivery model provided a reasonable model of project governance, there were some areas of ambiguity that were addressed for the larger-scale applications, particularly given the multiple large-scale funding partners involved. There was some confusion regarding the roles and reporting responsibilities of the chair of the working group and that of the project manager, and it was unclear what benefit or value adding, if any, accrued to the project by having the positions split between two officers in Queensland Transport.

A simpler and more efficient model was therefore developed for future projects where the project manager has a clear and direct reporting line to the project director and is also the chair of the working group. All key stakeholders are represented on the working group and, depending on their financial commitment and scale of issues involved, may also wish to be represented on the project steering committee. The concept of a project steering committee is particularly important as other funding partners come on board.
Regional pilot – Townsville

13.11 During 2003 Queensland Transport, in partnership with the Australian Greenhouse Office, Townsville City Council and Sunbus, trialled the TravelSmart Communities programme in Townsville, North Queensland.

13.12 The project was undertaken in the Townsville suburbs of Mundingburra and Hermit Park, and involved over 10,000 households using the IndiMark methodology.

13.13 A ‘before-travel’ survey established existing travel patterns prior to the distribution of appropriate materials and information concerning travel choices. Following this ‘application’ phase, an ‘after-travel’ survey was undertaken, with the results indicating that the pilot project was successful in achieving a shift in favour of environmentally-friendly transport. The major changes in behaviour were:

- walking journeys increased by 26%;
- there was a reduction in car-as-driver trips by 8%;
- cycling increased by 15%;
- public transport use increased by 13%.

Full-scale implementation – Brisbane

13.14 As a result of these successful pilot programmes, Queensland Transport embarked upon a major PTP campaign, covering 78,000 households, across 52 suburbs in North Brisbane during 2006/07. The project extends to Strathpine and Brighton, east to Nudgee and Banyo and west to Bridgeman Downs, Keperra and The Gap.

13.15 This is part of a larger programme of PTP, covering 104,000 people (with the remainder focused upon school, employer and community schemes).

13.16 The communities PTP programme will cost AUS$4.2 million over three years, with AUS$1.5 million each from Queensland Transport and the Australian Greenhouse Office, and AUS$1.2 million from Brisbane City Council.

13.17 The Brisbane study applies the IndiMark process and is currently being fully evaluated (after surveys will take place in April 2007). Early corroborative data from rail tickets indicates a 5 percentage point increase in rail use (from 3.6% to 9%). The project received a 52% participation rate, and over 9,000 household visits were conducted and 79 tonnes of information delivered. The project was delivered in an intensive six-month period, with the field work managed and undertaken by Socialdata.
13.18 There are a number of important lessons learned from the Brisbane implementation, as follows:

- The scale of the project was very important in creating momentum and critical mass. The scheduling of the PTP programme in waves across the neighbourhoods created interest from those that had yet to be contacted.

- The Queensland TravelSmart programme contains four integrated sub-programmes, each tailored to address different aspects of people’s trip patterns (residential, destinations, workplaces, schools), which together form a package of low-cost low-risk voluntary travel behaviour change projects.

- The strong branding of the promotional material, in particular the backpacks, resulted in high levels of willingness to be involved (it also created a visible presence on the street and significantly raised local awareness of the campaign).

- A good-quality rail network, with spare capacity, with an emphasis on targeting information towards the use of rail for commuter journeys.

- The use of bicycle couriers to deliver the TravelSmart material created a strong local identify in accordance with the sustainability principles of the programme.

- The distribution of efficient driving material for those expressing no interest – which in turn generated some additional feedback form those that subsequently became involved.

- The use of a third-party independent auditor (Ian Kerr) to substantiate the evaluation process.

- Strong support from the local people, media and politicians – the project captured the imagination of the people.

- The delivery of the project on time and budget, including the recruitment and training of 150 field staff. The total project timetable was 18 months, but the actual time to deliver the ITM component was only six months.

- The marketing material was designed internally and printed externally, enabling a control on the quality of information to be closely monitored.

**Brisbane travel cafés**

13.19 The concept of the transport (or travel) café was developed by Brisbane City Council as a possible alternative delivery mechanism to the traditional form of individualised marketing, in that instead of bringing information directly into households (via telephone and mail), a central point of contact was selected where households regularly come (i.e. a shopping centre). At this ‘delivery point’, a compressed version of the individualised marketing ‘dialogue’ was undertaken, in conjunction with the distribution of relevant brochures, timetables, maps etc. Bus drivers were also on hand to answer residents’ questions regarding public transport use.
13.20 Comparative evaluation of this delivery mechanism versus IndiMark indicated a number of issues that need to be addressed if the transport café is to be considered a more robust methodology. This includes:

- The reluctance of some people to engage in a meaningful conversation about their travel behaviour in this physical environment. The familiarity of the home environment and the ability of people in this context to consider the TravelSmart process at their leisure is seemingly an important aspect.

- The ephemeral nature of the transport café precludes people coming back to ask more questions/resolve issues etc. A feedback telephone line helped, but at the core of this issue is that the traditional individualised marketing process goes on for a reasonable period of time, whereas transport cafés in the two Brisbane applications only occurred for a couple of weeks. A longer application time is required.

- Some people missed out on the cafés, as they were away or went to the shops outside the times of the café. Hence there is a need for a more intensive presence at the shopping centre during the time of the project.

13.21 On the positive side, the transport cafés showed:

- They were much cheaper to deliver.

- They had a very high recognition factor with the public. They were also highly regarded by the public and did much to boost the council’s image. The shopping centres also regarded them highly and waived the normal fee for using internal space.

- They were highly regarded by local councillors, who used the opportunity to engage with their communities.

- They were very popular with people who just wanted general information on walking, cycling and public transport (i.e. not a detailed conversation about personal journey planning).

13.22 An independent evaluation commissioned by the council showed conclusively that the traditional form of individualised marketing demonstrated travel behaviour change in accordance with the expected target for change. Whilst the transport café didn’t deliver this quantum of change, it was still a cost-effective method of delivering travel behaviour change and has considerable potential for growth. Ideally, the transport café could be used as an adjunct to household delivery or as a reinforcing methodology to communities who have already engaged in TravelSmart.
Noosa TravelSmart

13.23 Located approximately 150 kilometres north of Brisbane, Noosa is a self-contained community, comprising low-density housing, with a high level of tourist accommodation. The population of Noosa and Tewantin (which comprises the TravelSmart Noosa programme) is approximately 30,000. Noosashire Council operates the TravelSmart brand under licence from the state government.

13.24 TravelSmart is an area-wide travel behaviour change programme, which forms the backbone of the Noosa Integrated Transport Plan. Noosa has made a firm commitment to restrict future road building and invest efforts on promoting safe, sustainable and healthy travel (Figure 13.2). This is achieved through a range of tools, but with the primary focus on school and employer travel planning. It is currently embarking upon a broader community travel information programme, delivered through roaming travel cafés, which is particularly relevant as an alternative model of PTP, as it seeks to offer a low-cost opportunity to engage directly with the population on travel behaviour change.

13.25 The early trials of the mobile travel cafés have been encouraging, using this as an opportunity to trial different approaches (for example, Noosa quickly identified that it needed to offer soft drinks in addition to free coffee, given the tropical climate that prevails). Offering free drinks as the inducement to enter, and locating and staffing the cafés at prominent locations (for example supermarkets and retail centres), combined with good-quality local information (see access guide below), and the opportunity to trial new forms of transport (for example electric bikes) has proved to be a local success.

13.26 Noosa has achieved significant success in its school travel planning (STP) activity, with reductions in car use of up to 42% (the highest achieved across Australia). Interestingly, the evaluation process has been particularly strong, utilising ‘before’ and ‘after’ surveys of pupils (simple design and structure), but only comparing like for like results of the same pupils (i.e. the creation of a panel survey by design). Hence, the evaluation directly compares the travel behaviour of the same population set both before and after implementation (surveys are undertaken one year apart, with the STP intervention at least six months before the ‘after’ surveys). The evaluation was carried out independently.
13.27 The TravelSmart brand for Noosa (Figure 13.3) is particularly strong, with a suite of products that are well established across the population (most notably the backpack, which, like in Brisbane, provides a strong sense of local identity and a focus for the travel behaviour change programme). The branding has been enhanced by creating interest and competition for the use of sustainable transport (for example through the STP programme) and supported by more general marketing, such as roadside banners and branded timetables at bus stops (all bus stops have been updated with a new stop-specific bus timetable).

13.28 As a direct result of the broader travel behaviour change programme, bus use across Noosa has risen by 100% (having been in decline until 2001). This increase has been sustained though a combination of hard improvement measures (new bus infrastructure), information provision (for example the bus-stop-specific timetables), service improvements, and the behavioural change programme delivered through the school, employer and community travel plan programme. Noosa Council has an excellent relationship with Translink (the operators of the bus network) and has recently launched a progressive strategy to stimulate further growth of the bus market.

13.29 Cycle use has also seen a sharp increase, as has the use of scooters. This has been monitored directly through the pupil travel surveys (showing a 100% sustained increase at Tewantin High School), cycle counts (at locations across Noosa), the establishment of four bike shops (all of which have seen the commercial need for bike retail and servicing) and significant demand for scooter and cycle parking in the main commercial areas.

13.30 There has also been anecdotal evidence of change, demonstrated through the positive comments received from the local population, and from the clear diversity of transport use visible on the streets of Noosa (Noosa does not have congestion, and the network accommodates pedestrians and cyclists, with priority, through good design principles and moderate driving behaviour). Over the last three years, significant efforts have been placed upon increasing the availability of the off-road cycle network, ultimately creating an environment where cyclists are well catered for. The knock-on effect has been a clear change in attitudes and less demand for both highway construction and maintenance.
13.31 Noosa is treating the behaviour change programme for transport to a similar process deployed for litter (which has been very successful). In essence, this involves getting the message out through a range of community engagement tools, understanding the motivators for change and acting upon these. In the near future, Noosa will be launching TravelSmart for visitors, in essence providing information pre-arrival, and can envisage a much more accessible network of sustainable travel being provided (for example, the free holiday bus has already been a great success). Whilst such intensive provision of sustainable transport (Figure 13.4) comes at a cost, it has been comfortably justified as an appropriate investment, not least through the reduced outlay on the road-building programme, highway maintenance and averting the need to convert roundabouts (which are prevalent in Noosa) to traffic signals.

Figure 13.4: Noosa Parade Transit Centre

13.32 As a result of the high levels of success achieved through the STP programme, Noosa has not yet fully applied the PTP process to wider sectors of the community, and at this stage has not yet confirmed whether it will adopt the Queensland Transport model of IndiMark. There are a number of issues that Noosa will need to consider carefully, namely:

- Is it appropriate for a community the scale of Noosa (30,000 population, living in generally low-density housing)?
- Would it be effective in dealing with the transient population and associated difficulties of gaining access to static populations?
- Is it cost-effective, and does it compare favourably against the travel café, school and employer travel plan model? Or can it be applied to complement the work of the travel cafés?
Can it be applied transparently, such that the officers (of which there will shortly be four full-time behavioural change officers) can understand the mechanics of the programme, and have full access to the data sets and individual dialogue offered?

Does PTP genuinely achieve long-term change? (The current view of the Noosa officers is that travel habits are likely to revert to ‘previous behaviour’ after a period of time.)

Will a limited number of one-to-one dialogues really make a difference, given that the evidence in schools and among employers shows the need for sustained one-to-one activity for real change to take place?

Other general issues

13.33 At the same time as discussing the Brisbane PTP project, several discussions were held with Queensland Transport staff on their views on the PTP process. The following summarises the key issues:

- Practicality of the evaluation process is important, and in particular to limit the cost of the project by adopting a pragmatic approach that integrates evaluation within the programme, supported by the use of corroborative data and external auditing.

- Clients must be fully engaged with the PTP process, and, even if outsourcing the delivery, fully appreciate the processes deployed by the appointed contractor.

- To understand the complexities of PTP, and to accept that the approach adopts sophisticated social behaviour theories, about which transport planners are generally not well informed.

- To recognise the value of PTP as a complementary measure to other initiatives, and hence to be flexible on the funding mechanisms and business case (for example, to recognise the long-term health benefits associated with walking and cycling).

- To restrict the temptation to seek too much detail from the travel surveys – overloading participants will ultimately affect the quality of data, and attrition rates. Keep it simple and collate just what is needed.

- To appreciate the long-term gains of PTP, and to consider this within the evaluation process and funding model.

- To recognise the fluctuations in travel associated with external events (e.g. weather, petrol prices), and to ensure appropriate rounded evaluations take account of these (appropriate sample sizes, and selective use of panel surveys supported by corroborative data).

- To consider the programme from the participants’ point of view – to consider the pre-implementation data carefully, and use it to improve the design and delivery of information.
To recognise that the greatest opportunity is likely to be capturing walk/cycle trips for leisure and shopping journeys (hence consider incentives such as comfortable shopping bags, umbrellas, bike panniers) which directly target the market you are seeking to address.

Important to consider the concept of ‘goodwill’ within the cost–benefit evaluation process (i.e. the value placed upon the PTP process by participants – repeat client business for the bus operator).

To consider advertising revenue, for example highlighting shops on walk maps.

To appreciate that PTP brings a host of varied benefits – for example the use of local facilities created by a better-informed population.

Long-term sustainability can be enhanced by building in maintenance costs of around 10% per annum (i.e. to provide PTP to house movers).

Rather than consider transport in its traditional sense, and seek surveys relating to barriers to access, focus more on the positive components (i.e. what would make people change). This is likely only to be achieved during in-home interviews, when dialogue can be created on specific trip opportunities.

Use the pre-intervention surveys as advocacy tools, promoting more widely the opportunities and propensity to change with members.

Use the pre-intervention surveys for other projects – for example informing transport and land use models.
14. Melbourne (Victoria, Australia) PTP

14.1 Interviewees:
- Alice Woodruff (Victoria Department of Infrastructure);
- Katherine Evans (Victoria Department of Infrastructure).

General background

14.2 Melbourne provides an interesting demonstration of the delivery of PTP, having delivered several projects of differing scales, and testing different delivery processes and evaluations.

14.3 The Victorian TravelSmart Communities programme seeks to increase the use of sustainable travel modes (Figure 14.1) within the existing urban transport and land use systems. It does not rely on the provision of additional or improved transport services or infrastructure. Changes in people’s travel behaviour are achieved in the short term and sustained over time through:

- working with individuals and households on a voluntary basis;
- direct contact to motivate people to think more effectively about their daily travel;
- focusing on benefits individuals can realise by changing behaviour;
- providing practical and realistic travel information to individuals and households, customised to suit their needs;
- facilitating initial experiences of new sustainable travel and activity choices through motivation and incentives;
- providing positive reinforcement to participants and supporting them to continue choosing sustainable travel;
- connecting people to existing organisations for their ongoing travel and activity information needs (e.g. public transport operators, local recreation organisations etc.).
PTP has been driven primarily by the Victoria Department of Infrastructure (Victoria DoI) with support and delivery mechanisms in recent years through the local councils (of which there are 79, ranging from 30,000 to 100,000 population).

**Stage 1: small-scale pilots**

In 2002/03 the first small-scale pilots were undertaken, providing the opportunity to test a range of PTP delivery tools. A total of 4,257 households across all project areas were contacted and invited to participate in TravelSmart. Of these, 2,037 households participated: 611 households in Brunswick project area, 820 within Dandenong and 606 within the Elwood project area. The cultural, linguistic and socio-economic conditions are very different in each of these three project areas, as is access to public transport, walking and cycling infrastructure.

The TravelSmart team talked to households interested in participating in the TravelSmart pilots about the activities they undertake and their travel needs, and sought to understand the core values of household members (time, money, health, environment or independence) which influence travel behaviour. Participating households were offered TravelSmart tools to help them trial alternative modes of travel for some of their current car-based trips, namely:

- **Travel Blending**: Using a travel diary, people track their travel over a week at the start and end of a three-month period. Feedback, praise and travel tips are then given. All information is customised to fit in with the person’s values.
- **Personal journey plans**: For people who need extra information or assistance to plan a specific trip by public transport, walking and cycling.
- **Local activity guides**: Information on services and activities in the project area. The premise of this tool is that if people know more about what shops and services are close to home, they will be more likely to use them.
- **General information**: Five pamphlets – one for each key value – detailing ways to reduce the negative impacts of the car.
- **Activity pages for children**: To stimulate children’s interest in and encourage them to initiate conversations about travel and the travel choices made in their household.

A small sample of participating households were surveyed by phone and asked to provide feedback on:

- TravelSmart tools;
- the various methods of engaging the community, including the non-English speaking households; and
- whether households had changed travel behaviour in response to the project.
14.8 The results showed limited success, but importantly provided an insight into the PTP delivery processes and an initial understanding of household motivators for change. They also gave confidence to continue to test the delivery PTP within Victoria and to increase the scale of future pilot projects.

**Stage 2: medium-scale pilots**

14.9 In 2003, the first medium-scale projects were launched, providing the platform to test the Socialdata approach developed in Perth. In Alamein, 6,300 households were targeted, with Socialdata undertaking the entire project process (delivery and evaluation), with little local authority intervention.

14.10 The project ran from June to September 2003 and focused on households within the Alamein rail corridor. Alamein is a high socio-economic, established area with almost 40% of households’ income over AUS$1,500 per week and 50% of households owning their property. The area is well served by public transport. The Alamein train line connects Alamein with Melbourne city. The Belgrave/Lilydale train line services the southern end of the project area. A number of bus routes, two trams lines and a dedicated network of cycling and walking trails also run through Alamein. The project partners were:

- City of Boorandara;
- Australian Government – the Australian Greenhouse Office.

14.11 The Alamein project was evaluated using a mail-back diary technique, where households recorded information about all out-of-home activities each member undertook on a particular day. The travel diary provided an accurate account on how, where and why residents travelled (or did not travel). The ‘before’ survey was undertaken in April/May 2003 and the ‘after’ survey completed in November 2003. An additional survey of 400 households was undertaken to gather qualitative data. Supplementary data sources included on-board surveys for the Alamein train line and public transport ticket validation data.

14.12 In Alamein, 2,900 households received tailored TravelSmart packs including public transport, walking and cycling information to help them choose environmentally friendly ways of travelling. The mail-back diary completed by 530 households indicated that TravelSmart Alamein resulted in:

- 10% decrease in people driving alone;
- 27% increase in public transport use;
- 26% increase in walking;
- 23% increase in cycling.
14.13 These findings are relative to a control group of 413 households who did not participate in TravelSmart. The travel behaviour change outcomes achieved through TravelSmart Alamein are considered as indicative, but sufficient at that time to warrant further development of the methodology.

14.14 The community’s response to the project was overwhelmingly positive. The 400 household survey found that:

- 85% thought the TravelSmart project was a worthwhile activity;
- 98% used the TravelSmart materials they had requested;
- 93% of households who received a home visit found them useful;
- 91% thought further TravelSmart campaigns should be undertaken.

14.15 The success of the TravelSmart trial around the Alamein rail line demonstrated that many people are interested in more sustainable travel options but have not sought relevant information.

14.16 Keen to continue to understand the PTP process and delivery mechanisms in more detail, the Victoria DoI launched the Darebin pilot in 2004, and appointed Socialdata to deliver the ITM programme, as well as an independent evaluation team from the Urban Transport Institute. The project commenced in April 2004 and was completed in October 2004, covering the suburbs of Northcote, Alphington, Fairfield, Thornbury, Preston and part of the Reservoir within the City of Darebin. In total 27,000 households were contacted and invited to participate in TravelSmart. The project partners were:

- City of Darebin;
- Metlink;
- Australian Government – Australian Greenhouse Office.

14.17 The TravelSmart Darebin project was evaluated through the following activities:

- a trends analysis using data available from public transport operators and VicRoads to identify background trends in travel behaviour and to identify any specific changes in the study area of Darebin;
- a before-and-after panel household travel survey of Darebin residents before and after the implementation of the TravelSmart project.

14.18 The Darebin project evaluation was completed in September 2005. Results of the TravelSmart program were drawn from the ‘trends analysis’ data and show:

- 2–3% reduction in traffic on streets inside the Darebin study area;
- 15% increase in tram ticket validations at route points inside Darebin over past 12 months, compared to balance of Metro tram network;
- 3% increase in train ticket validations at stations inside Darebin over the past 12 months compared to balance of Metro stations;
a 3 percentage point increase in average customer satisfaction rating for public transport in the Darebin area.

14.19 The before-and-after household travel survey was designed to measure an approximate 10% reduction in vehicle kilometres travelled (VKT). This was based upon the evidence from the earlier projects. A sample of participating households was asked to fill in a one-day travel diary in March 2004 and again in March 2005. Due to the smaller reduction in VKT, the sample size of households used in the surveys was insufficient to measure change at a 90% confidence level. Therefore changes observed in the travel diaries were not statistically significant at a 90% confidence level and therefore could not be relied upon to estimate the impact of the TravelSmart project.

14.20 While the before-and-after travel surveys of a sample of participating households were not as conclusive, local traffic count data and Metcard validation statistics showed the benefits of the TravelSmart programme, with less car use and more public transport use. An independent value for money assessment was carried out by Maunsell, which concluded that the pilots had resulted in a positive cost–benefit ratio of 4:1.

Stage 3: large-scale implementations

14.21 One of the implications of the independent evaluation was that, in order to push ahead with the delivery programme, the next stage of PTP in Victoria, a large-scale implementation in Maribyrnong and Moonee Valley, covering 45,000 households, and costing AUS$5 million, had to commence before the evaluation findings were fully reported. A high proportion of residents in these municipalities are from culturally and linguistically diverse backgrounds. For example, 40% of City of Maribyrnong residents were born outside Australia; residents come from more than 135 different countries and speak more than 80 languages.

14.22 Both local councils worked with the TravelSmart team to ensure all community members – including those who speak English as a second language – had the best opportunity to engage in and benefit from TravelSmart.

14.23 Given the scale of the implementation, and the keenness of the Victoria DoI to trial alternative approaches, the delivery contract was split among three consultancies, (Socialdata, Steer Davies Gleave and PBAi), all of whom worked with a standard core methodology as provided in the brief by Victoria DoI (which included the typical PTP stages of initial contact, segmentation, follow-up and advice).

14.24 At the same time as this large-scale implementation was progressing, the Victoria DoI were assessing the role of different interventions to encourage sustainable transport, most notably community engagement programmes such as school, employer and community travel plans. These were of particular interest, as they were based on models of longer-term community engagement (typically over three years), and started to address some concerns regarding the long-term sustainability of PTP in isolation (for example, in Darebin, the final evaluation showed
that traffic levels in the region had reduced initially, but had returned slowly to near-expected levels – approximately 1% below expected).

14.25 During the large-scale implementation, there were also issues regarding the direct contact methods employed across a diverse neighbourhood (each consultancy had a different approach and emphasis – telephone versus door knock preferences), and this was further complicated by difficulties in accessing a standard telephone directory for all households.

14.26 At the same time as the large-scale implementation, at the national level, the Australian Greenhouse Office was advocating large-scale implementations (500,000 household projects), yet this posed a problem in Victoria, as the costs had to be supported by local district authorities, which were not (and are still not) considered feasible (only a small number of projects have so far been co-funded, including a 10% contribution to the Moonee Valley project by the local district council). At the local level, convincing district councils of the merits of PTP is much more challenging, and hence the emphasis is switching to school, employer and community travel planning techniques, where longer-term engagement processes can be established.

14.27 Whilst PTP remains part of the solution in Victoria, it now sits within a suite of measures promoted primarily through the district councils with support via the Victoria DoI. This is particularly important for the long-term sustainability of PTP, as part of the enabling role of the DoI is to ensure adequate training for officers locally on the practicalities of delivering PTP (including, importantly, project management skills), recognising the diverse skill range of local officers tasked with delivering PTP projects. The Victoria DoI is currently in the process of delivering a AUS$16 million local area action plan programme, based upon bids received from district councils, and this may provide a platform for further PTP projects if projects emerge from the bid process.
Other general issues

14.28 The work of the Victoria DoI is very important to the *Making PTP Work* study, as it has tested different approaches to PTP and the evaluation aspects, and is seeking to develop a pragmatic and sustainable model that integrates with other ‘smarter choices’ measures. The following summarises some of the key messages of relevance:

- PTP can bring a host of benefits not easily evaluated, not least the strong local media reporting of PTP within local communities.

- Independence to the evaluation process is important (to be seen to be transparent). This poses all sorts of difficulties, not least in specifying contracts, and on a practical level determining initial sample sizes to ensure confidence levels can be reported with outcomes (for example, in Maribyrnong the results of Darebin were not available, hence sample sizes were based upon an expected 10% reduction in VKT. The Darebin results, when independently evaluated, suggested 5% was the actual reduction figure, and hence it was discovered after the early stages of the Maribyrnong had got under way that the sample sizes were going to be too small to report figures with any level of confidence).

- There remains debate over what constitutes the ideal evaluation (travel diaries, control and target groups), but it is important that the evaluation process ultimately identifies the overall change as noticed in background travel conditions across the region targeted.

- Corroborative data is all-important, in particular public transport patronage and data taken from area-wide urban traffic control (UTC) counts.

- It is important to recognise that there are many external factors affecting mode choice (for example fuel prices), and these must be accounted for in the evaluation process.

- There must be a good alternative public transport, walking and cycling network available.

- More work is required on some of the subtleties of PTP, for example diagnostic testing of different engagement tools (work is currently under way in South Australia to consider this issue).

- Data analysis should underpin the project design process – for example, using the demographic data to determine an appropriate timing schedule for the contact stage.
• The practicalities of delivering large-scale PTP need to be considered carefully from the outset. A good example is that, within the consultancy contracts, minimum participation rates were set (deliberately low to avoid chasing targets and concentrate on quality), which in reality were easily exceeded. The result was that the initial orders for incentives placed by the local authority (who were charged with this component) were not sufficient, and hence time lapses and higher additional costs (as goods were not available in bulk) were incurred.

• PTP must be seen within a bigger suite of measures, and in particular other community engagement programmes (school, workplace and community travel plans in particular) can offer significant advantage and often directly tackle the peak period congestion.

• The need for transparency in the data sets throughout the process, and for the local authority to have unrestricted access to data to ensure that the process is fully understood and, where necessary, challenged.
Acknowledgments

In preparing this report, the project team are grateful for the contributions of a number of individuals and organisations who have offered their time and energy to assist in the wider understanding of Personal Travel Planning. In particular, we would wish to thank the following:

**Case studies**

Cat Ainsworth (Worcestershire County Council)
Colin Ashton Graham (Government of Western Australia)
Howard Booth (Lancashire County Council)
Stuart Croucher (Brighton and Hove City Council)
Katherine Evans (Victoria State Government)
Sinead Flavin (Transport for London)
Claire Fleming (Nottinghamshire County Council)
Andy Gibbons (Nottingham City Council)
Mike Ginger (Bristol City Council)
Andrew Gordon (Smarter Travel Sutton)
Beth Hiblin (Peterborough City Council)
Martin Higgitt (Steer Davies Gleave)
Bruce James (Queensland Transport)
Syd Jerram (Noosa Council)
Gary John (Government of Western Australia)
Dan Johnson (Transport for London)
Graham Lunney (Queensland Transport)
Penny Marshall (Government Office North East)
Peter May (Transport for London)
Dawid Maciejewski (First Midland)
Jennie Maybury (Nottingham City Council)
Neil Smith (Sustrans)
Dean Spears (Brighton and Hove City Council)
Alton Twine (Brisbane City Council)
Emilie van de Graaff (Worcestershire County Council)
Any Wardell (Peterborough City Council)
Nigel Walker (Noosa Council)
Charlotte Welch (Brighton and Hove City Council)
Owen Wilson (Darlington Borough Council)
Doug Woodbury (Brisbane City Council)
Alice Woodruff (Victoria State Government)

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