Pledge exploratory research

08215

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Confidentiality

Research conducted by 2CV

Contents

Executive Summary

Executive summary

- *Overall, a positive response to the idea of 'better travel'*

- *In response to the new ideas, those which allow people to gather information is popular, although people are not currently actively searching for additional information about travel*

- *A reticence across the sample to provide personal information in general, although some of this can be alleviated if it means people receive specific, tailored information*

- *Among our sample of those 35+, there is less willingness to engage with online only ideas. In particular social networking-style approaches for this audience do not resonate with this audience*

Overview of the Research

Research Background

- In January 2009, TfL undertook a research and development project to explore the potential of a CRM initiative that would encourage Londoners to make changes in their choices of transport toward more sustainable modes

- Stage 1 of this project was focused on understanding the psychological and behavioural journey of behaviour change in order to feed into development of potential ideas for a CRM.

- Following stage 1, TfL and Engage developed a range of both on-line and off-line initiative ideas designed to support and encourage modal behaviour change amongst Londoners.

- Stage 2 of the research was conducted with Londoners at various points on the journey of behaviour change in order to understand how these could be employed as part of a CRM program.

The Research Process

Stage 1:
The Psychology of Behaviour Change

Stage 2:
Creative Evaluation

To understand the landscape of behaviour change and initiatives in order to identify the potential for a CRM program

Benchmarking and business to business web exploration by Engage

Concept development

Exploration of consumer reaction to CRM program initiatives and concepts, and further direction for concept development

8 x In-Depth Interviews

9 x Discussion Groups

8 x Discussion Groups

Pledger Interviews

Stage 2 – Research Objectives

To explore the appeal and potential of the CRM concepts to support and encourage modal shift and offer strategic and executional guidance.

More Specifically:

- **To explore which concepts would be most likely to:**
  - Act as a trigger mechanism for creating change in those who are considering change
  - Help customers who have committed to making change by supporting and sustaining their efforts

- **To examine whether customers would be prepared to share personal details in return for personalisation of CRM, and what types of information/to what extent they would be willing to do so**

- **To explore the most appropriate channels of communication for reaching customers that are most likely to embrace these concepts**

Methodology and Sample: Discussion Groups

- 8 x focus groups were conducted for dynamic discussion about behaviour change initiatives, and to workshop potential CRM ideas
  - In order to test concepts with customers in all stages of behaviour change, groups were composed of three broad phases: Considering, Sustainment and Lapsing.
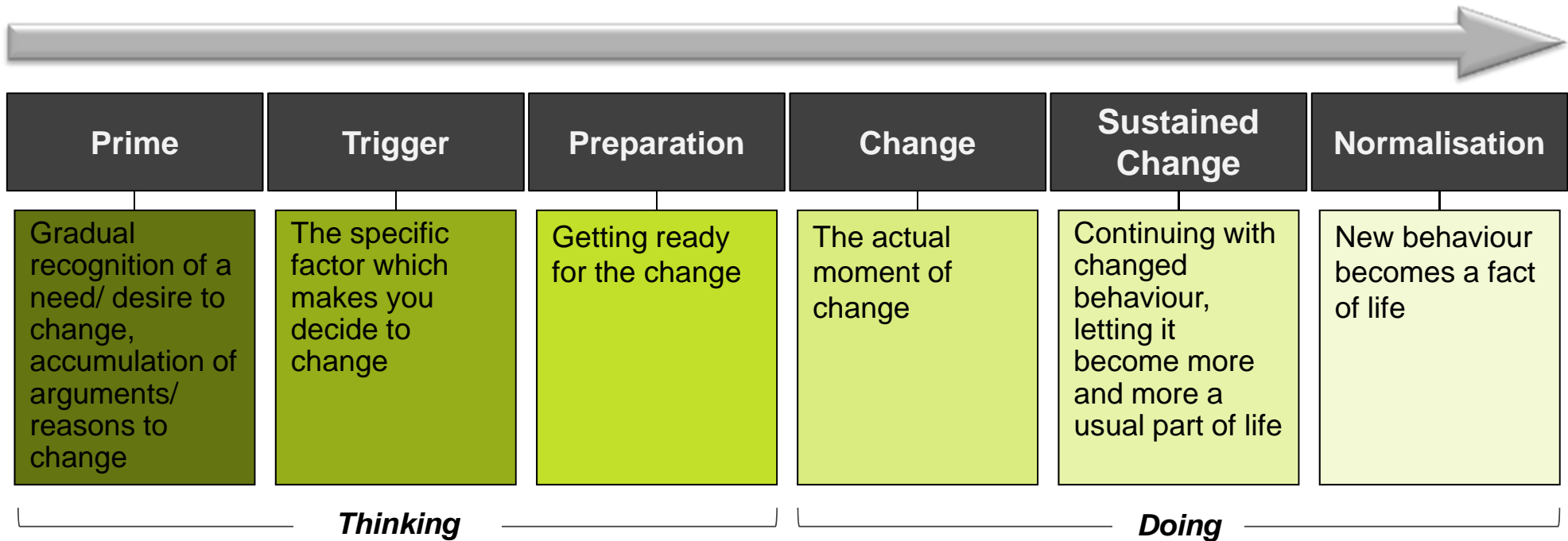
	Stage of Change	Car Usage	Lifestage	Gender	Location
1	Considering	High	Pre-Family	Mixed	Outer London Boroughs
2	Considering	High	Post-Family	Mixed	Outer London Boroughs
3	Considering	High	Family	Mixed	Inner London Boroughs
4	Considering	Low to No	Pre-Family	Mixed	Inner London Boroughs
5	Sustainment	Low to No	Family	Mixed	Inner London Boroughs
6	Sustainment	High	Post-Family	Mixed	Outer London Boroughs
7	Lapsing	Low to No	Family	Mixed	Inner London Boroughs
8	Lapsing	High	Family	Mixed	Outer London Boroughs

Contextualising the Findings

Relevant learnings from the first stage of research

Stage 1 – Summary

- The first stage of research found a multi-stage journey to behaviour change:

Prime	Trigger	Preparation	Change	Sustained Change	Normalisation
Gradual recognition of a need/ desire to change, accumulation of arguments/ reasons to change	The specific factor which makes you decide to change	Getting ready for the change	The actual moment of change	Continuing with changed behaviour, letting it become more and more a usual part of life	New behaviour becomes a fact of life

Thinking — — — — — — — — — — — — — — — — — — *Doing*

- At any point in this journey, people can lapse or regress, mental engagement and motivation is critical for success

- Learnings from this process of behaviour change therefore indicated that CRM had potential once people have been 'primed' towards sustainable modal choices

Stage 1 – Summary

- Travel and travel behaviour sits in a unique position in people's lives:
  - It is a daily activity/choice – that is habitual and also constant

- It is a badge of pride in London to be well versed on your travel options and to be making sensible choices. Most respondents therefore feel that they are already taking the best options available
  - Stage 1 revealed that there is not an apparent spontaneous demand for a sustainable travel CRM and that any CRM initiative would need to be supported by a ATL campaign or movement that would prime behaviour change

- However, once more people are triggered, there is potentially a role for support (possibly delivered by TfL through a CRM):
  - Information- practical help, resources for change
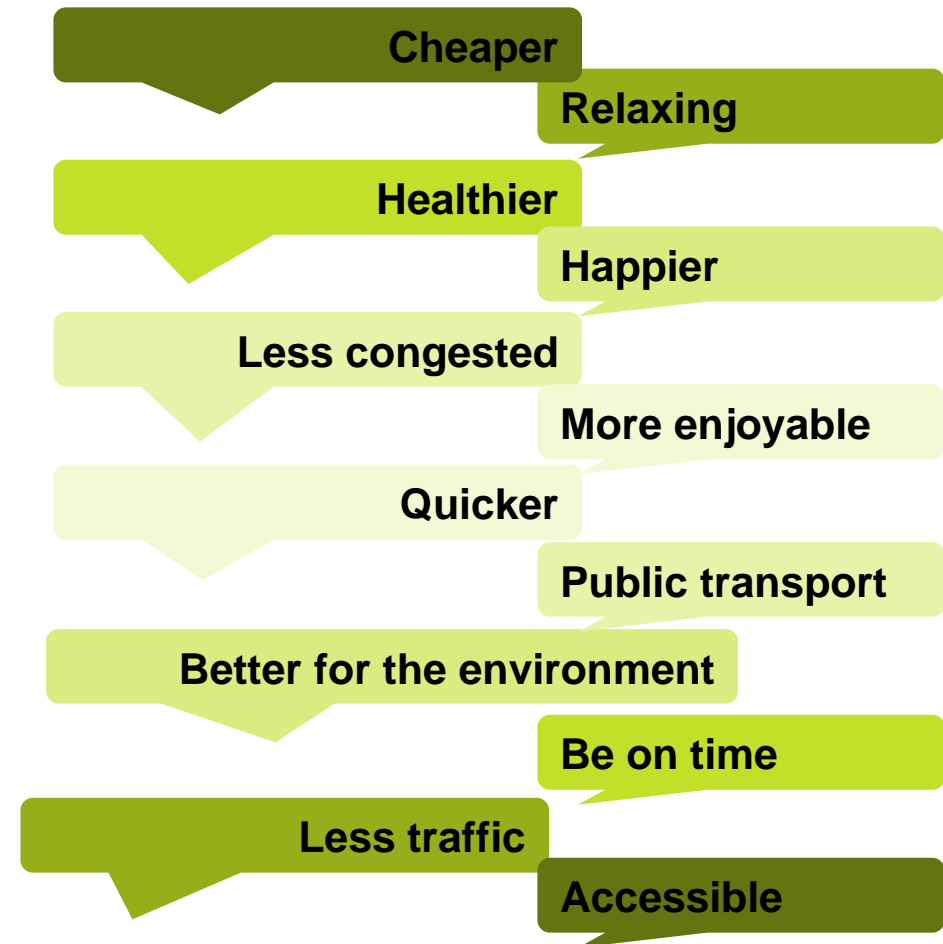 - Engagement- emotional encouragement in change

Observations on the Sample (Stage 2)

Reaction to 'better travel'

Reasons for change

Everyone is positive about the idea of 'travelling better'

- A plethora of different meanings for people that encompass both the functional and emotional benefits of better travel
  - A positive way to talk about travel and the choices that people make

- 'Quicker' and 'cheaper' are the perceived rational benefits

- 'Easier' is the emotional benefit that encompasses many different meanings for different people

Cheaper

Relaxing

Healthier

Happier

Less congested

More enjoyable

Quicker

Public transport

Better for the environment

Be on time

Less traffic

Accessible

Research reaffirms that 'better travel' is a powerful means of communicating to people

As seen in previous research, respondents generally happy with their current travel choices

- Across the spectrum, people feel they already have their 'best' route already sorted around London

  - Daily commute in particular is seen as being fine tuned

- Travel choices tend to be rather subconscious, instantaneous decisions

- People are also relatively happy with the way that they travel around London

  - A perception that other routes would be worse in some way, e.g. slower

Research reaffirms that people are not actively seeking to change their journeys

Lifestyle changes factor heavily in changes to travel

- Those who had started to change their travel had done so for a number of lifestyle factors
  - New partners
  - New house
  - New job
  - Health problems / health scares
  - Awareness of aging process

> I started this new job and I realised that I just spent all day sitting at my desk, so I try to walk as much as possible now

> We moved to Bermondsey and the car was costing us £90 a month for just sitting there doing nothing, it was so much easier and cheaper to be without it

For those who are changing, they have done so for a reason other than frustrations with current transport choices

Safety is a big issue for people

- Across all groups, people talk about wanting to be safe when they travel around London on all modes of transport.

  - Parents in particular talk about wanting to keep their children 'safe'

- Safety can be a real barrier for some people

  - Cyclists talk about the danger of traffic when there are no cycle lanes etc

- However, safety can also be a perceptual barrier – one indicative of a fear or resistance to change

  - Walking late at night often cited as being 'dangerous'

In trying to persuade people to change their modes of transport, the issue of personal safety must be taken into consideration

'Green' issues are secondary for many people

- Everyone talks about the environment and trying to do their bit to protect it

  - Still a hot topic at the moment

  - Councils encouraging more recycling etc

- However, in relation to modes of transport, it would appear to be a secondary justification, rather than a motivation

  - It gives them another reason to justify their travel choices

- Greens issues currently pushed back due to recession

  - Cost saving is a message that chimes best with people at the moment

  - Lots of uncertainty about their financial futures

It is important to keep the 'green' message, but other factors are more likely to drive behaviour change

Public transport is perceived to be a positive way to travel

- People feel virtuous for using public transport

  - The car is demonised for being bad for the environment, yet public transport is hailed as the solution

- People consider themselves to be doing their bit when they travel by public transport

  - Protecting the environment

  - Reducing congestion

  - …and cheaper than running a car

It can be a confusing message if TfL is perceived to be telling people that public transport is a bad thing. Specific benefits of sustainable travel need to be highlighted, rather than negatives of public transport

CRM Exploration and Evaluation

CRM Concept Testing

Channels of Communication

Overall response to the concepts

- Overall, a sense that these ideas are not radically new

  - Some ideas feel very familiar (e.g. planning a better journey and Journeyplanner)

  - Some limited awareness that there is some of this information available already

- People respond positively to the idea of being able to learn more about their different travel options

  - Ideas that allow people to gather more information work well

  - People aren't actively looking for this information so they like the idea of it being all in one place for them to access easily
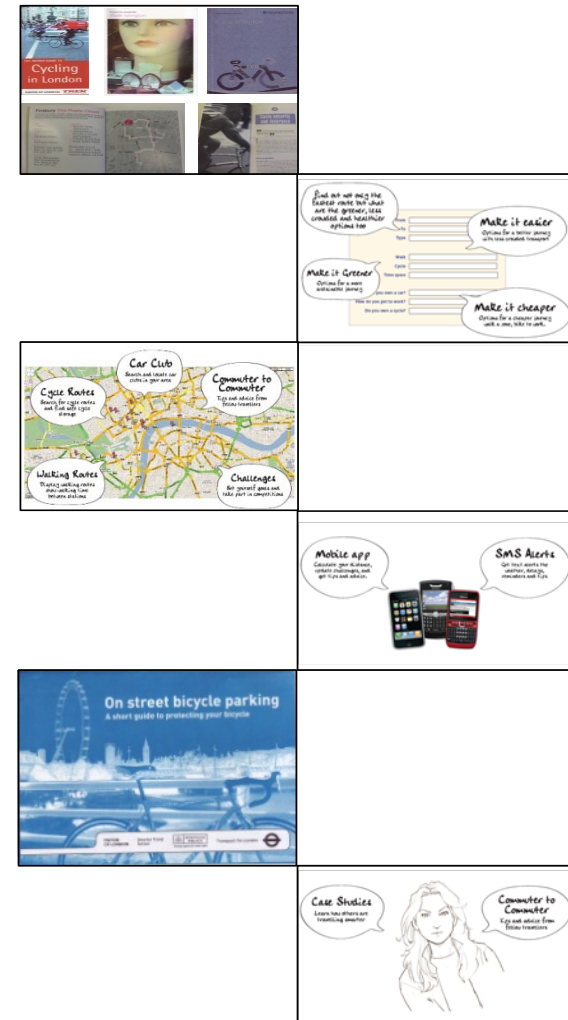
Overall Reaction to CRM Concepts (2)

- There is a consistent suspicion of being 'tracked' and/or receiving junk mail if they have to give up too much of their personal information, but respondents did like the idea of being able to get information customised to their own journeys and needs (e.g. 'planning a better journey')

- Accept that if they want to get this information, they will have to give some level of personal information

  - Benefit needs to be perceived to be big and immediate enough to motivate them to input their personal details

  - Receiving 'freebies' does go some way to attenuate this

- Older respondents (35+) tend to be less keen on interactive online approach

  - Spend less time online generally

  - Few using social networking sites at all
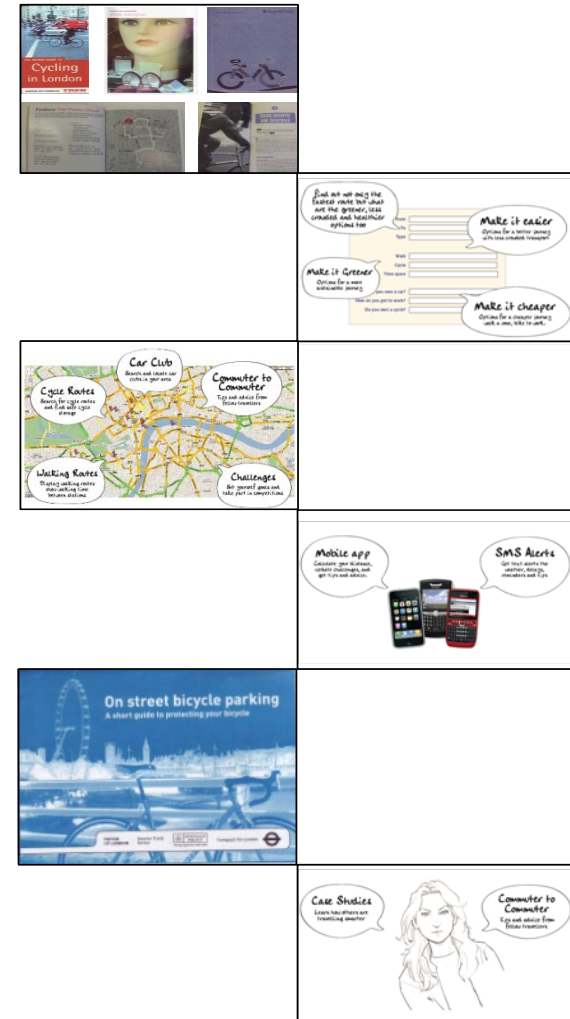
'Modal Shift' is a difficult message for people to grasp

- People sense that different groups of people are being targeted for different modes of transport, but can be unsure about what exactly it means for them

  - Can be understood as trying to get *everyone* walking

- Few understand a mixed mode message

  - Assume the message is about replacing the whole journey rather than part of it in some cases

- A message from TfL about cycling and walking can also seem to people to be out of kilter with their perceptions of what TfL does

  - Wonder why TfL would actively try to reduce their revenue!

Mapping the ideas
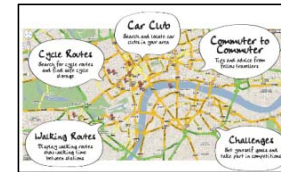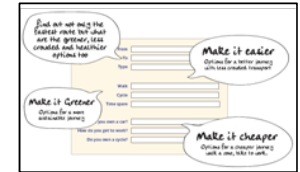
Appeal ↑

Likelihood to change behaviour →

Information local to you

Get the big picture

Planning a better journey

Tips for keeping your bike safe

Information to your mobile

Reminders and Stay Motivated

Useful kit

Smarter driving
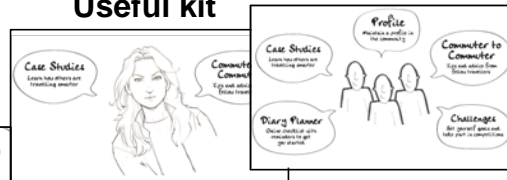
Social, Supportive and Collaborative and Learn, Share and Discuss

Welcome pack

Planning a better journey: overview

- **A familiar format giving people the chance to see different travel options in one go**

- **Considered simple and easy to use**

- **Could raise awareness of different travel options available to them**

- **Easier, greener and cheaper work well as options**

- **Perceived to be an additional build to the current JourneyPlanner**

- **May only be used when making one off / infrequent journeys**

Planning a better journey

Planning a better journey

- One of the most popular ideas, liked across all groups
  - Simple and familiar format (recognised as Journeyplanner)
  - Provides possible inspiration for different routes

- However, people do not always plan journeys
  - As such, people envisage that they would only use this on an infrequent basis
  - For journeys where they do not feel they know the best route already

- People feel the options offered match with what they would be looking for: less congested, healthier, more enjoyable (and where possible – cheaper!)
  - However, people feel that the 'bike' option on Journeyplanner at the moment is part of the way there

Although a popular idea, people question whether this is an idea on its own or just a more developed version of the current JourneyPlanner

Get the big picture: overview

- Liked for the way that information is presented visually

- Feels like lots of information can be presented here

- Again, appears simple and easy to use

- Dislike the idea of creating 'challenges' for themselves of other people

- Considered to be very similar to the service offered by Google maps already

- Feels as though you would want this information spontaneously, on the go, rather than planned in advance

Get the Big Picture

I prefer this, because it's not actually taking information from you, you just go on there and get the information that you want. It's not connected to your email or your phone or anything.

Challenges sound very childish, something that you'd do with your little kid…you just want it to happen, you don't want to have fun with it. In the morning you just want to get there. You don't want challenges.
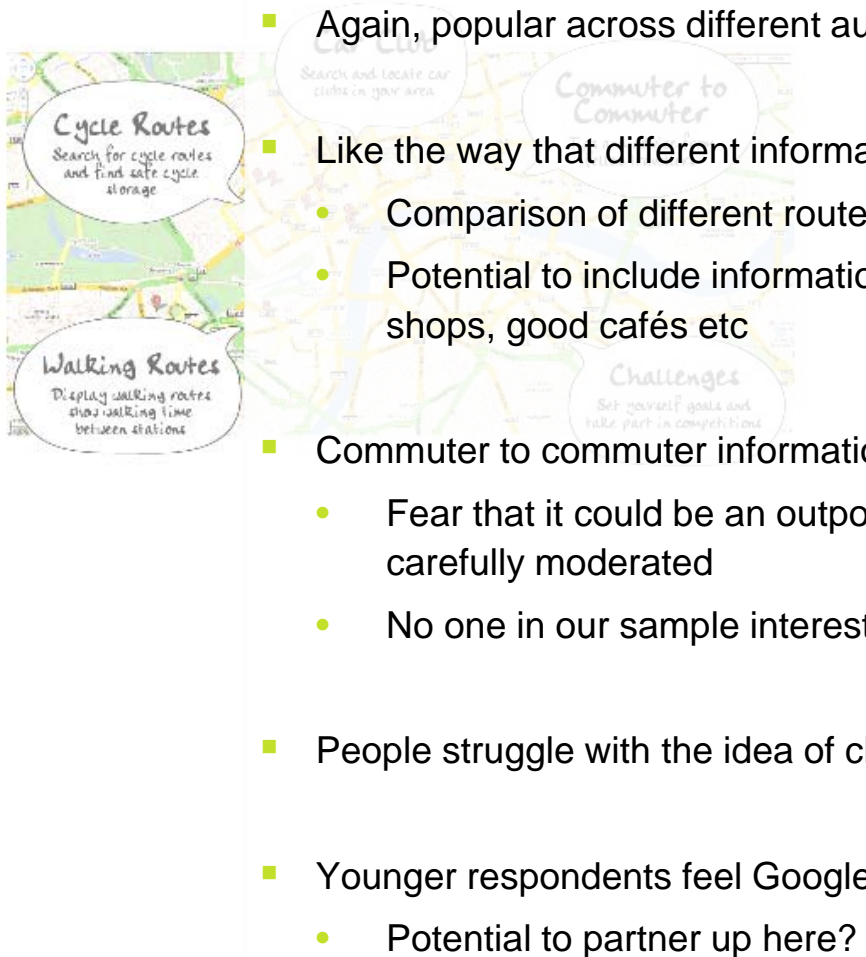
In the morning you just want to get there. You don't want to do challenges.

If I wanted to walk to work, I'd like to know the safest route…It would be nice to know if I could stop off and get a drink, go to the shop.

it seems more familiar. It's an idea that's already around, but it's elaborating on it. You can go on Google maps and get directions immediately. It's just making that more user friendly

That's what they do on Google maps now as well. You can logon and click on Knightsbridge, and Harrod's comes up, and it gives you other information of local things. It all links together…the whole surrounding area from there.

Car Club
Search and locate car clubs in your area

Cycle Routes

Commuter to Commuter
Tips and advice from

Walking Routes
Display walking routes show walking time between stations

Challenges
Set yourself goals and take part in competitions

Get the Big Picture

- Again, popular across different audiences due to its visual nature and perceived ease of use

- Like the way that different information could be presented on this idea
  - Comparison of different routes, highlighting carpools, etc
  - Potential to include information about your specific route, e.g. interesting buildings, nice shops, good cafés etc

- Commuter to commuter information has some limited appeal
  - Fear that it could be an outpouring of dissatisfaction with the route – so would need to be carefully moderated
  - No one in our sample interested in leaving messages for others

- People struggle with the idea of challenges here: cannot see what the benefit would be for them

- Younger respondents feel Google maps is already offering something similar at the moment
  - Potential to partner up here?

The power of maps

- Maps have an emotional resonance with people as well as the rational, functional purpose

- Emotionally, 'Get the big picture' can feel very engaging and resonate with the positive aspects of sustainable travel modes
  - Getting to know your local area
  - Seeing landmarks and more of the 'outdoors'
  - A sense of progress as you get to different places

- There is also the potential to provide people with a different perceptual map of London
 - Layering on a different map for people of above and under ground travel choices

Information local to you: overview

- **People like receiving more information about their local area**

- **Would like to be able to find out about things across London in other areas too**

- **But an inherent contradiction in people's behaviour**
  - **People do not look for information on their own area,**

- **Needs to be constantly up to date, or people will dismiss it**

- **Needs to be available both in print and online**
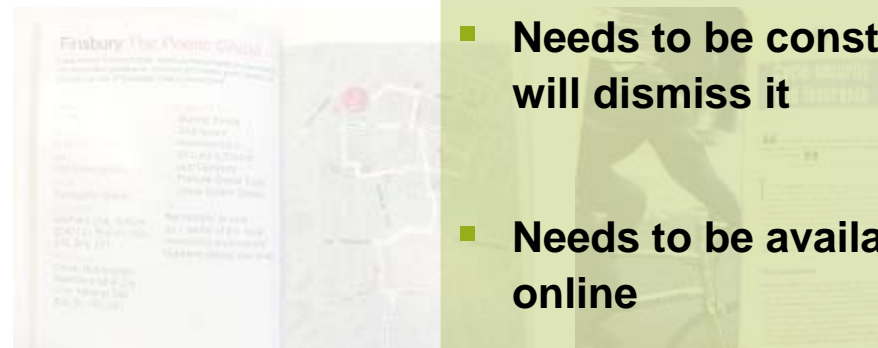
Information local to you

I think it would be easier if it was handed out at tube stations.

It's quite good if you want to do a bit more cycling, say you want to stick to your local area and you think, 'What would be a good route for a few miles?'

I know my local area, so I'd more interested if that was in another area, where I don't know as much. If that was online, say you wanted to visit Islington, you just click on that

I see this as more on the website. You could put that on route-finder and have a box saying 'tick for cafés on the route' if you want to stop for a coffee

London ones are just too vague or general. You might not need information on Shoreditch, but if you're in Southwark, it'll be nice to read about it.

This would be good in tube stations, when you get off somewhere that you don't know

Information local to you

- People like the idea of finding out about different things in their local area

  - However, no one is actively searching for this kind of information at the moment

  - A sense that they miss out on things happening in their area because they do not find out about it in time

- 'Local' is usually interpreted on the borough-wide level

  - Want to find out about things they can access easily

  - But also want the information on other boroughs to be accessible easily

- Information should be available both online and offline

  - Older respondents in particular feel that this information would be useful to have in tube stations.

  - Online is seen as the ideal place to be able to access information about all boroughs quickly and easily

Information local to you – Tips for keeping your bike safe
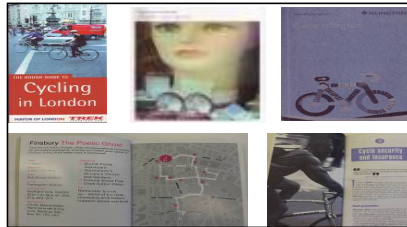
- This feels as though this is part of the information that you could receive
  - Learn about keeping your bike safe at home, when you travel to work and around London

- People can envisage other types of information that could be useful
  - Safer cycling at night
  - Safer walking routes

Any information that can address safety concerns will be of benefit to people

Building the ideas

- People feel that 'Planning a better journey', 'Get the big picture' and 'Information local to you' are all parts of the same idea

    - You start with the planner interface and results are displayed on the map

    - The local information is part of the different information available
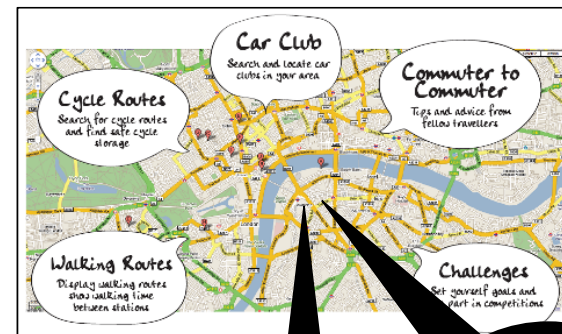
- Potential to incorporate other aspects of information such as safe places to store bikes, recommended bike repair shops etc

Information to your mobile: overview

- **Like the way this is available on the go**

- **Would like to receive updates if their travel plans are disrupted**

- **Older respondents worry about the cost and difficulty of using this**

- **Felt to be less tangible than a paper map**

- **Considered to be useful for the iPhone but not so useful for 'ordinary' phones**

Information to your mobile

It means you have to spend less time researching. Instead of having to go on your computer, you can just pull out your mobile.

If you were a bus stop and you know it was going to be another 40 minutes or something and then telling you there's another one around the corner

Mobile app
Calculate your distance, update challenges, and get tips and advice.

SMS Alerts
Get text alerts the weather, delays, reminders and tips

That's ok because you can get stuff on the go

It could remind me that the Victoria line is closed this Saturday…. Or warnings that the Piccadilly line is going to be really busy…. Just simple warnings

Updates on cancellations on the buses. There was an advert on the radio, get your morning alerts on MSN, text, whatever... It's kind of somebody else doing something that's already out there.

That would be a good one… tell me if there where delays on my nearest tube… as long as it's for free!

Information to your mobile

- Currently envisaged as an 'alternative route finder' when they have problems with current public transport routes
  - SMS to alert them to problems with their routes
  - However, this is felt to be similar to some of the travel tools already available

- Liked for the fact that this can be used out of home for spontaneous journey planning
  - For positive changes, e.g. nice weather when leaving work
  - For emergency changes, e.g. train is delayed etc

- Concerns about any potential costs involve in this idea
  - ..And for post-family respondents, they query whether their phone would be up to the job

- Care needs to be taken if sending out update messages
  - Do not want a daily weather update, but some tolerance for an occasional message relevant to the mode of travel (e.g. today's a great day to cycle!)

Social, Supportive and Collaborative *and* Learn, Share and Discuss: overview

- **Information from other commuters is liked for the fact it is impartial (and not advertising or marketing)**

- **Can get honest feedback on different routes they may be considering**

- **These two ideas feel very similar to people**

- **Strong resistance for signing up for another, separate online community**

- **Fears about giving away too much information**

- **Concerns that this could be a very negative place – people come to gripe and moan about TfL**

Social, Supportive and Collaborative *and* Learn, Share and Discuss

I don't understand why you would need to have a profile of where you're travelling on a daily basis…I'm not interested. Like pooling up together. It is a risk.

This is hitting the younger generation, isn't it?...because it's online and it's like Facebook. I hate it, they're so used to it…I'm a very private person

There's enough weird people out there, and I don't want to share with them how I get to work, and then have some sort of recognition

it's a bit annoying having to log into another site, with a password.

That's basically social networking for travel. I wouldn't use it. Who's got time?

What's the incentive to log on here everyday?

It's like a forum, just leave a message there… but if someone is p*** off with something, they put it on the forum and leave it there for everyone

I don't think travel is an exciting enough bit of glue to bring people together.
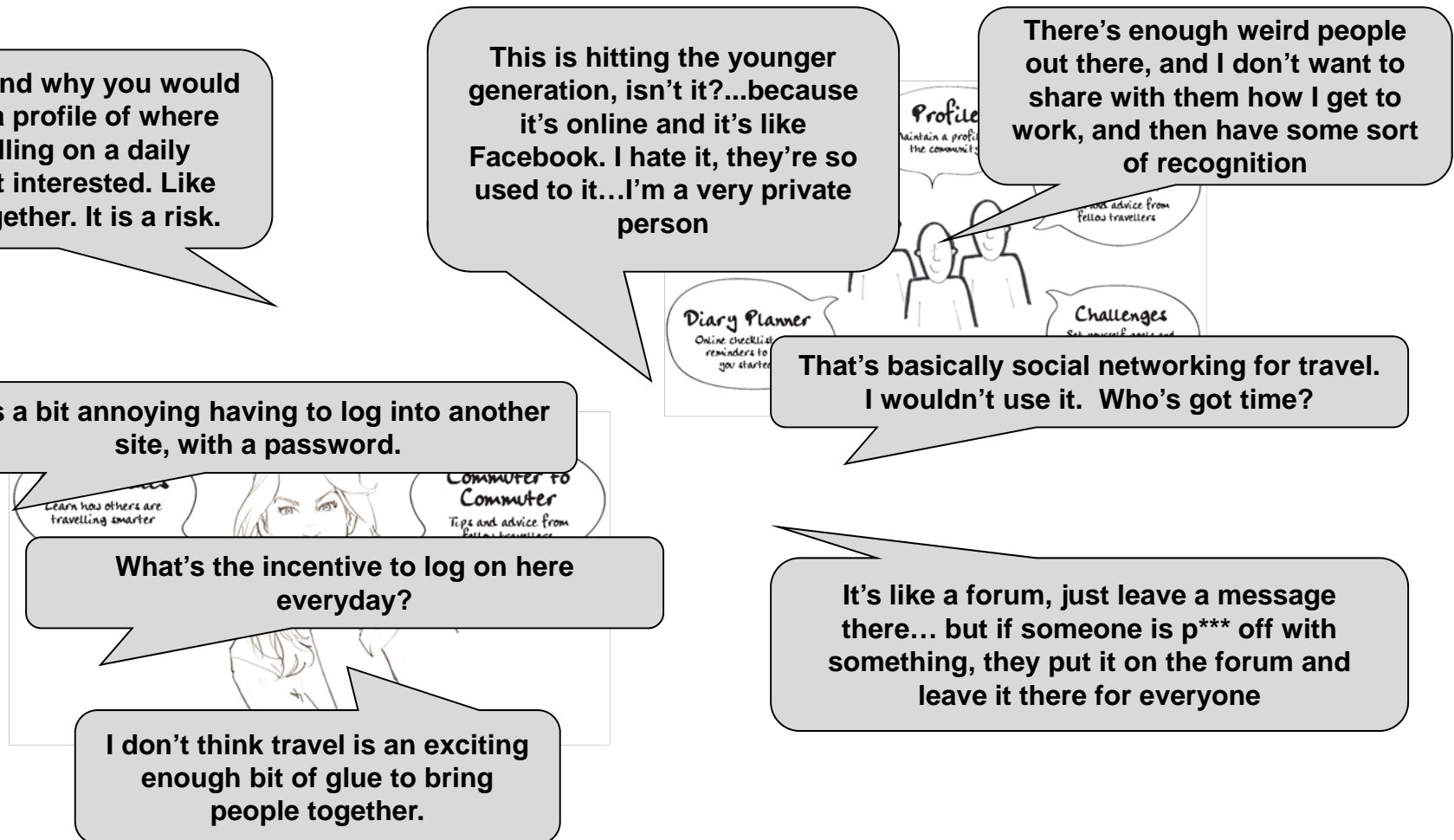
Social, Supportive and Collaborative *and* Learn, Share and Discuss

- The two ideas seem quite similar to respondents: being different parts of a Social Networking website

  - Few want to engage in this way – would happily read what others write, but not submit anything themselves

  - Feels like *another* username and password to remember

- Resistance to the idea of a separate travel community website

  - Feels very niche as an interest

  - Could be a negative space: people go to moan about problems with travel

- Feels a bit too gimmicky as a Facebook application – transport not felt to be a topic to 'share' information on in this format

  - And very few of older (35+) respondents actually have an Facebook profile

Welcome pack: overview

- **Plenty of people who like the idea of receiving free stuff**

- **Useful if you had already decide to change – a nice nudge to get you going**

- **'Welcome pack' sounds like you have to sign up for a heavy change**
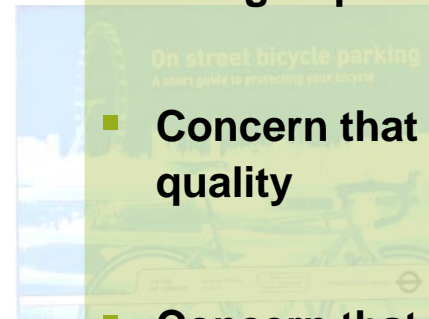
- **Concern that the items could be poor quality**

- **Concern that people just sign up to get something for free, rather than actually**

Welcome pack

All this would keep you interested for five minutes, then you'd go off it, unless it was something you really wanted to do.

It's a bit patronising

That pedometer is just giving me information rather than encouraging me to walk further

If you add an ongoing incentive to it, and there's a reason to carry on using it, then it's more likely not to just sit in a corner and be forgotten about

I feel bewildered by that. What is this a welcome pack for, who is behind this?

It's something I would get and probably never open. It's all a bit of a novelty

Welcome pack

- Initially people question what they are being 'welcomed into'
  - Some worry that it is an extreme environmental lifestyle change
  - 'Starter pack' sounds more neutral
  - Questions about how they get this

- A pack of 'gift' items attenuates some concerns people have with giving away their personal information
  - People are happy to give name, e-mail address and borough if they can get a selection of goodies
  - Although recognise people just sign up for freebies without genuine commitment

- Each pack needs to be tailored to people and their needs, e.g. mode of transport, local area

- Items should also be useful and motivating
  - Whilst a puncture repair kit is useful, it reminds people of all the downsides to cycling!
  - Instead, people would like cycle maps, high visibility strips etc

Useful kit: overview

- **Again, people like to receive free things**

- **Items linked to improving safety welcomed**

  - **People struggle to see how more free things could help them**
    - **People think that any problems would be greater than just receiving a puncture repair kit etc**

Useful kit

I don't know whether it would encourage me, as in, oh gosh, I'm getting a free pedometer, I'd better start walking, but if I was going to start walking and that was there, I'd have that, and see. It probably wouldn't change my mind

It wouldn't make start riding a bike

I'm thinking that I'd apply for that stuff, get it and never use it

The first thing you need is a bike. If you don't have a bike, you don't need this. And if you have one, you've probably got all that

The lights are a good safety feature. I was in my car the other day and I thought I could barely see the cyclist ahead of me

that's going to appeal to one kind of person, someone who's already got a bike and uses it anyway.

Useful kit

- As we saw before, people like to receive free things

- However, people struggle to see what role this would play in helping them to 'travel better'
  - Currently feels like free things for the sake of it

- As shown, this feels like it aimed specifically at cyclists.
  - People are uncertain about what you could give people who travel on public transport or walk

- When linked to safety, people think this could be useful, e.g. high visibility clothing etc

Reminders to Keep You on Track *and* Stay Motivated: overview

- **Like the idea of being supported and helped to make better journeys**

- **As before, people like free items**

- **Concern about how they share their information with TfL**

- **Some items feel very gimmicky**

- **Want to ensure that items are tailored and specific to their needs**

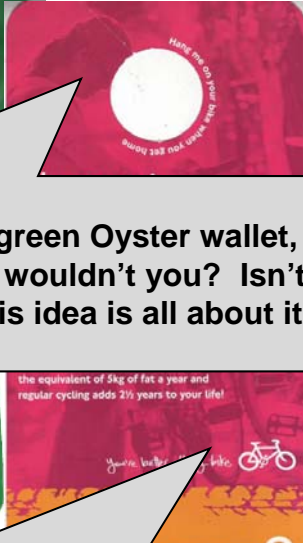- **Support does not have to be a physical item – email reminder would work too**
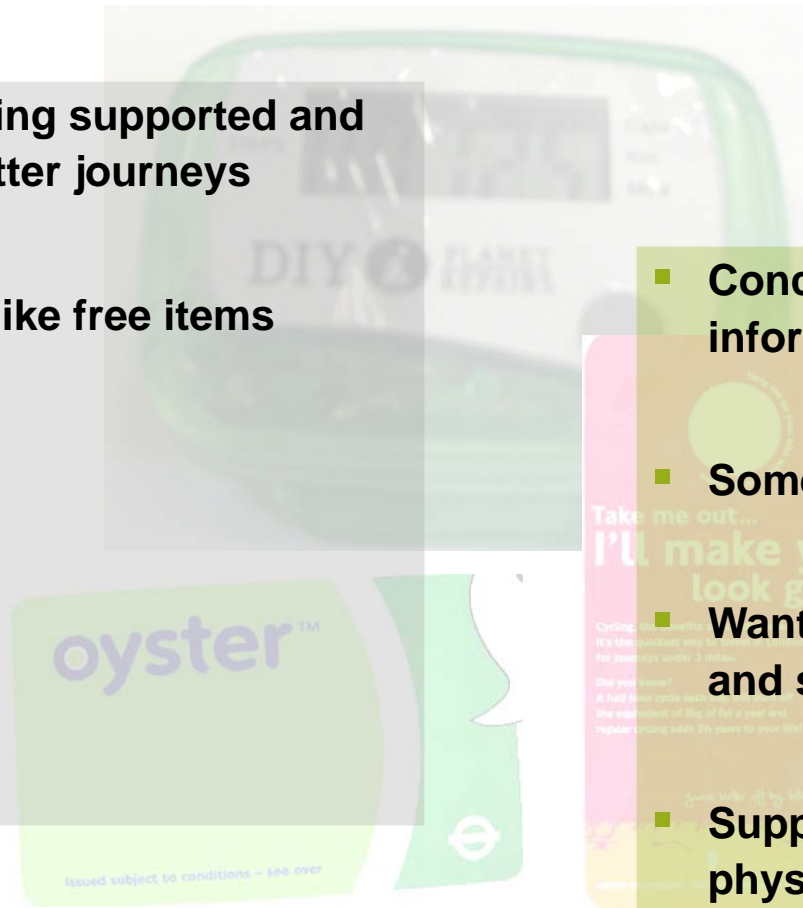
# Reminders to Keep You on Track *and* Stay Motivated

Reminders to Keep You on Track *and* Stay Motivated

- The role of these two ideas was felt to be similar
  - Extra support to keep you motivated engaged with better travel

- Required people to have already begun a process of change
  - The Sustainers appreciated the fact that there would be things available to encourage them
  - Others feel that it is too far down the journey for them at the moment

- Some items felt to be a bit 'gimmicky'
  - the Green Oyster card holder and bike hanger in particular
  - Can raise questions for people as to why money is being spent on such trivial items

Smarter Driving: overview

- **For some in outer boroughs this feels like new information**

- **Liked for offering ideas for cost savings when driving as well as an environmental message**
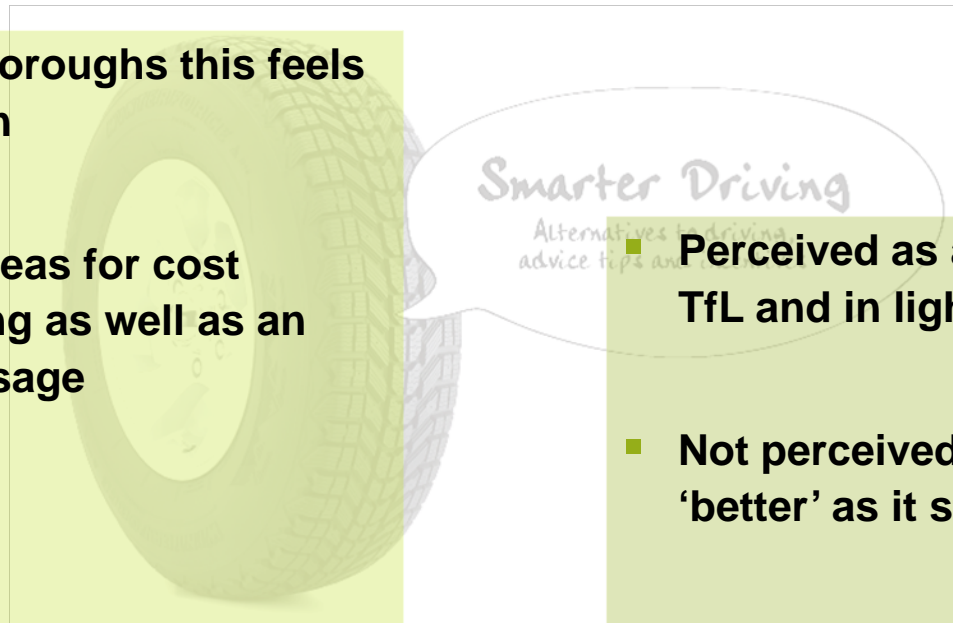
- **Perceived as a strange message from TfL and in light of the other ideas**

- **Not perceived to be part of travelling 'better' as it still involves the car**

- **For those in inner boroughs this feels like old information**

Smarter Driving

Smarter Driving

- Those in outer boroughs most interested in this, those in the inner borough feel as though this information is already available

  - Some make reference to the messages on the back of buses

- When viewed in relation to the other ideas, this feels as though it runs counter to them – telling people that it's "ok to drive as long as they do it with fully pumped up types"

- People also struggle to see how this could be made to fit with other forms of transport

Implications for TfL and a CRM Solution
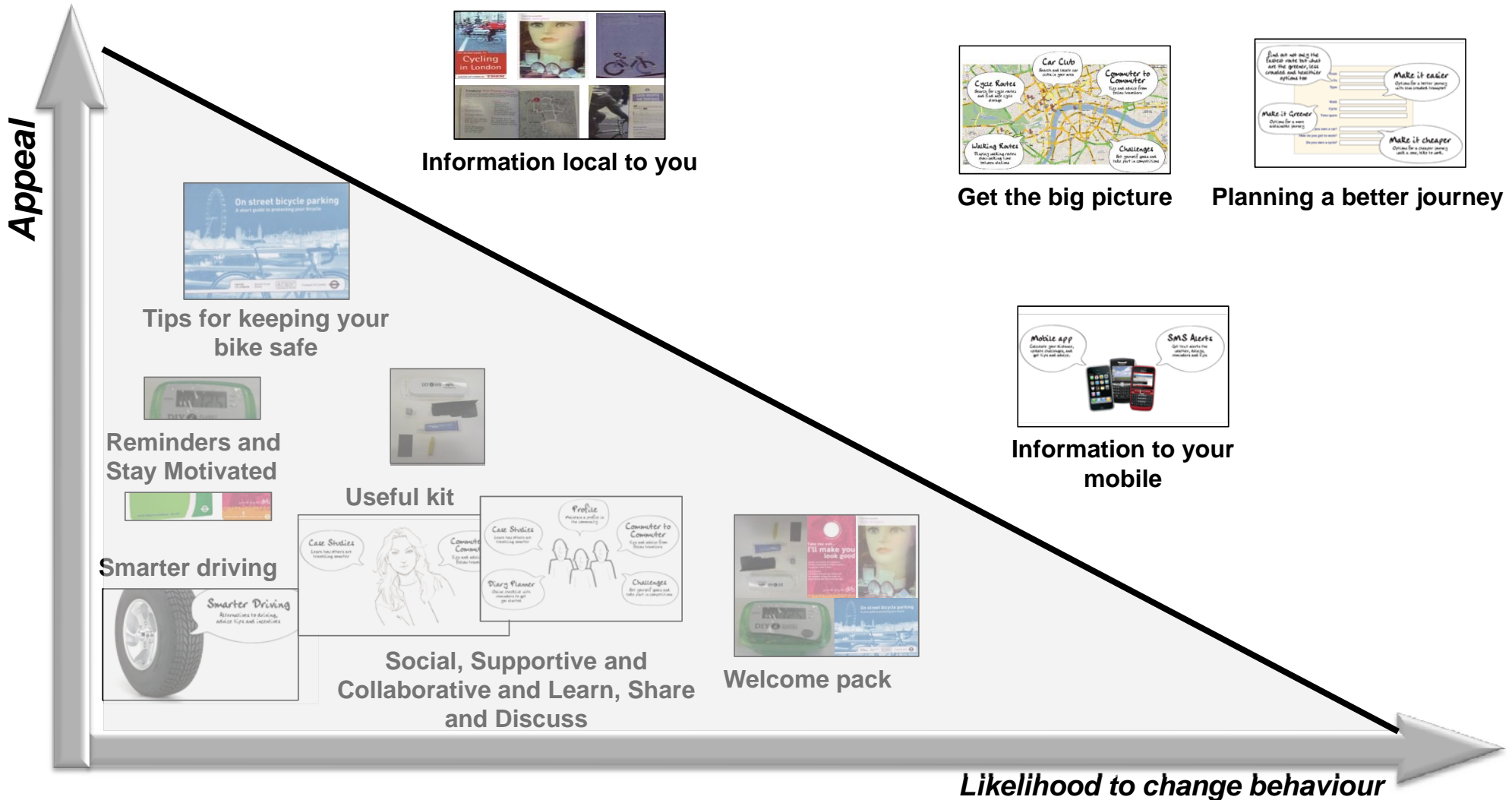
Summary of research

Summary

- People like the idea of being able to 'travel better'
  - 'Travel better' can be defined for people in a number of different ways

- However, people feel that they have currently found the 'best' ways for them to travel around London
  - Few actively seeking to change the journeys they make at the moment
  - Low awareness of the information that TfL already does provide to help them to travel better

- Careful handling required around messaging
  - People find it strange that TfL is encouraging people off public transport
  - Multimode messages can be confusing

Currently it would appear that there is a greater need to communicate the possibilities of travelling better as few people actively seeking this out themselves

Summary (2)

- People like the idea of information that it tailored to their own needs – i.e. their mode of transport, their specific journey, their local area etc

- However, there is a reticence to share too much personal information, fear of being tracked etc, yet appreciate the need to provide some data to be able to get the personalised information they need
  - Happy to give limited contact details such as name and email address as well as local area
  - Postcode and specific routes they use is felt to be too much to share

Summary (3)

Appeal ↑

Information local to you

Get the big picture

Planning a better journey

Tips for keeping your bike safe

Reminders and Stay Motivated

Useful kit

Information to your mobile

Smarter driving

Social, Supportive and Collaborative and Learn, Share and Discuss

Welcome pack

Likelihood to change behaviour →

Next Steps?

Team discussion of implications and how to best move forward, following the second stage of research