Portland's SmartTrips Welcome Program

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Webinar Transcript

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Tools of Change

Landmark Designation

The program described in this case study was designated in 2012.

Designation as a Landmark (best practice) case study through our peer selection process recognizes programs and social marketing approaches considered to be among the most successful in the world. They are nominated both by our peer-selection panels and by Tools of Change staff, and are then scored by the selection panels based on impact, innovation, replicability and adaptability.

The panel that designated this program consisted of:

- Mark Dessauer, Active Living by Design
- Jacky Kennedy, Green Communities Canada
- Ryan Lanyon, Metrolinx
- Nathalie Lapointe, Federation of Canadian Municipalities
- David Levinger from the Mobility Education Foundation
- Lorenzo Mele, Town of Markham
- Geoff Noxon, Noxon Associates
- Chuck Wilsker, U.S. Telework Coalition
- Phil Winters from CUTR and the University of South Florida
- JoAnn Woodhall, Translink

This transcript covers a webinar held on Wednesday, April 10, 2013. Additional materials about this program can be found at: http://toolsofchange.com/en/case-studies/detail/658.

Introduction by Jay Kassirer

Welcome everyone to our webinar today on SmartTrips Welcome. This is a second of our four Landmark case studies this season on transportation programs. The Landmark designation recognizes programs and social marketing approaches considered to be among the most successful worldwide. The peer panel [see p. 2 of transcript] rates these programs based on impact, innovation, replicability and adaptability.

I'd also like to acknowledge the organizations that have helped us to promote this webinar. Note that you can get continuing education credits with the Ontario Professional Planners Institute for taking these webinars.

Portland's approach targets new residents and builds on a solid track record of individualized marketing and the use of research design to assess effectiveness. The impacts demonstrate that the program is working.

In terms of the social marketing planning stages, you'll find some good information on the research that they've done, careful targeting and a strong evaluation. In terms of the Tools of Change that we talk about, you'll see great use of building motivation over time, feedback and encouragement, financial incentives, norm appeals, obtaining increasingly demanding commitments, overcoming specific barriers, and prompts and vivid personalized credible empowering communication.

We have three presenters today: Andrew Pelsma and Danielle Booth, two of the three SmartTrips staff, and Linda Ginenthal, the Programs Manager for the Portland Bureau of Transportation, Active Transportation Division.

Andrew has a background in education, community health and natural resource management from the University of Kansas and also from Stockholm University in Sweden.

Danielle Booth has worked for the City of Portland since 2008. She discovered the joys of working in transportation shortly after graduating from Portland State University with a degree in art history.

Linda Ginenthal is the program's manager for the Portland Bureau of Transportation active transportation division. With her team of transportation staff, Linda leads the innovative and award-winning SmartTrips, individualized marketing and encouragement approach, designed to change the way people travel for their everyday mobility to walking, bicycling, riding, taking transit, carpooling, car sharing—anything other than driving alone. She's also the architect of the Portland Sunday Parkways, or Ciclovía program, now in its sixth year.

Linda Ginenthal, Program Manager, Portland Bureau of Transportation, Active Transportation Division

As Jay mentioned, I have with me here Andrew Pelsma and Danielle Booth. I also have our third SmartTrips staff person Abra McNair. We're very excited about this Landmark social marketing case study award. We're very proud of that.

I'm the program manager for Portland's Bureau of Transportation, and I've managed the SmartTrips programs in Portland for eight years and have been working with SmartTrips programs since 2003.

I feel very lucky to get to do this on a day-to-day basis. I work with some of the best and the brightest. I'm seeing from the list of people, who are on this webinar, many of you are very familiar with SmartTrips.

What we're going to be covering today is our SmartTrips individualized marketing approach. The goal of this webinar is to get into the meat of the strategies we adopted and what tools we're using to implement this behaviour change program for new residents in three specific geographic areas of Portland. We'll also talk about evaluation methodologies and our results.

[Slide] So, why do we do this? In the Portland Bureau of Transportation, like every other transportation demand management group does, we reduce the vehicle miles traveled (VMT). We are also looking for increasing understanding and awareness. We really want to change people's attitudes about the transportation options available in Portland.

Portland has done a good job of building new infrastructure for bicycling, walking and transit. We brought the street car back. We also have a wide variety of car sharing; other drive-alone or drive-smart options is what we'd like to call them and what we find is it's not enough to "build it and they will come" although there will be people who are early adopters. We find that we really do increase the number of people who will use environmentally-friendly transportation. We just sell the product. We just tell people about it and really promote it.

[Slide] SmartTrips is about dialogue, a dialogue with new residents. We want to start a dialogue with people, and we are not in the business of pushing information out. We're interested in engaging people in a conversation about all their transportation choices and these are choices that people are generally pretty interested in doing. They really want to change how they get around. They want to be healthy, more efficient in their time and their money, and they want to enjoy their local community.

Through SmartTrips, we are getting them information that they are specifically asking for (again, we're not pushing the information out) which creates some attitude shifts as well as straight-up behaviour changes. So, how do we do this? Here are the five different kinds of strategies we use.

[Slide] Welcome SmartTrips uses all five of these tried and true behavior change strategies. We use targeted individualized ways to get the most advantageous and "sticky" results. Danielle will talk more specifically about the nuts and bolts of the program and how we present the information and incentives, and other communications tools we use to reach and influence people's behavior change when we jumpstart the change for new residents.

[Slide] Portland has a population of close to 600,000 in a region of 2.2 million. It's relatively compact. We have an urban growth boundary that doesn't allow us to sprawl so it means our transportation choices are a lot less difficult because we are more compact. We are the number one bicycling city in all of North America, and we like to talk about that a lot. We're also rated a platinum city by the League of American Bicyclists, and that's something we take a lot of pride in; 6% of all of our commuting trips are done by bicycle.

We're also known for our progressive planning and transit policy. It's kind of in the blood here. People come here to experience transportation, so I'll talk a little bit about the SmartTrips Recipe.

[Slide] When you think about baking a cake, you're not really talking about flour and salt and eggs. You start by looking at the results—what the cake will look like and how delicious it's going to be.

The SmartTrips recipe is pretty delicious. Since our pilot program in 2003, SmartTrips individualized marketing program has shown measurable and significant reductions in drive-alone auto trips; each year we choose a different area of the city to focus on and, by now, we've been all over the city and found that, in all corners, people do change their behaviour once we start the dialogue of SmartTrips.

What is SmartTrips? SmartTrips is the way we engage residents. We send them an order form where they can pick the transportation information they want about walking, biking, transit, carpool, car share, driving smart, and also give them a choice of three incentives (e.g., an umbrella), and then we package it all up in a tote bag and deliver it to their homes by bicycle within two to three weeks. That quick turnaround reinforces the messages that we're right on it.

[Slide] Why new residents? Since 2003, SmartTrips has traditionally been geographically based. The theory was that people who had already moved were open to change and this might be a great time to help them consider how they would get around. We also got some really good feedback from participants in our SmartTrips residential program - people who have recently moved - and they love it. They think it's the greatest thing because they are changing their travel behavior anyhow. Research shows that new residents are already changing their travel behaviour, so we wanted to start them off on the right foot with the right tools and information they can use to get around their new neighbourhoods.

Objectives

[Slide] The main objectives were to reduce vehicle miles traveled, reduce drive-alone trips and encourage environmentally-friendly modes; we want to increase biking, walking, and taking transit, and we included car share and carpooling as well. We also had a goal to engage 8% of new target residents to participate in the program. Our numbers are generally a bit higher than that. We've had up to 28% and as low as 15% in our geographically-based residential program. Here, we wanted to set the bar a little bit lower. We know this is a really hectic time for new movers and we weren't sure we were able to gain their attention.

Most TDM strategies focus on the work trip. With this program we're shifting, not just work trips, but also neighborhood, home-based trips. Lastly, we wanted to engage each new mover three times, seven time for each person who actually chose to participate. I'm going to turn it over to Andrew now who'll talk a bit more about the rest of the program.

Andrew Pelsma, SmartTrips staff member

As Linda mentioned, we initially theorized that targeting new movers would be an effective approach and potentially an effective next step for SmartTrips. We began this process by doing a little research, looking to see 'who is moving, when they're moving, and where they're moving to'. [Slide] We soon found US Census data indicating that 35% of the entire population had moved between 2005 and 2010. To us, this represented a significant number of people with an immediate gap in knowledge about their local travel options.

According to a study done by United Van Lines on annual migration patterns, Oregon has come in as the number two state for in-bound migration over the last several years. One of the more interesting studies we came across was a 2003 German social science experiment conducted by three researchers (Bamberg, Rolle and Weber) where an individualized marketing intervention was used at a time of what they called a "changed decision" context, meaning immediately after relocation. The research found that if, when in a new situation, people received personally relevant and persuasive information, they were more likely to use it for making new behavioural decisions. We believe this is a key component to the program.

[Slide] Brain research has shown that habitual behaviour, which is basically doing something repeatedly over and over again, creates in our brains neural pathways for that behaviour. This is where neurons are continually firing in repeated sequences, creating deeper and deeper pathways that become easier and easier for us to process. It's an evolutionary adaptation that allows our brains the ability to focus on other, more immediate or challenging concerns.

Think of it like paths in the snow. We tend to follow the same habitual behaviour pathways because they're the easiest behaviors for our brains to process, but when a person changes residence, everything changes, the way to the store, the way to work,

even the steps to the fridge change. At this time of change, decision context offers a unique opportunity to create new neural pathways or reinforce old ones that haven't been used for a while and make these stronger than habitual pathways.

Barriers

[Slide] I'm going to discuss several barriers we were up against for helping participants create these new pathways. Some of these we weren't aware of at the beginning of the program and learned of them from participants as we went along.

The first is system intimidation. This is where a new mover might be intimidated by the size or complexity of a transportation system as large as Portland. Next, is lack of awareness. When you're new to an area of town, you may not be aware of what's around you and what travel options are available at your new location. The third barrier for the target audience was lack of information, which is along the same lines as lack of awareness.

[Slide] For anyone new to a neighbourhood, there is a definite learning curve, a knowledge gap that needs to be bridged. For instance, new movers might see a bus running past them but might not know where the bus goes, how to catch it, how much it costs, etc., and unless it's absolutely necessary, they may never seek that information out. Depending on where they're from, there may also be a socio-economic stigma for some travel options. New movers may have the impression that riding the bike or the bus is not cool and this gives us a chance to let them know from the outset that this is how we get around here in Portland. This is what's cool. Come join us. I believe this also provides a good opportunity for socio-normalization behaviour change strategies to be effective.

Finally, the regional differences. We chose three very disparate geographic regions to target in this program. Being able to address all three regions in a way that was relevant to each individual participant posed a challenge to us. We'll get into more that in just a minute.

Target Audience

Danielle Booth: I'll take you through the next section. [Slide] Who are these new movers? For this particular program, we defined a new mover as a resident who moved to or within Portland in the sixth-month period prior to program launch. We're often asked, how do you find these new movers? For this program, we chose to purchase a mailing list from a data services company.

These companies use the US Postal Service's National Change of Address Database, so the information is updated on a monthly basis. It's relatively inexpensive and if you would like further information on whom and how, please feel free to contact me directly after this webinar.

[Slide] I'll take just a brief moment to give a little overview of Portland in geographic terms to describe where we targeted the new movers. This is the city of Portland. The Willamette River separates east from west and the point of that arrow roughly indicates the location of our downtown. There's also the Columbia River forming our northern border.

The colored regions you see here are the areas we chose to target. These three regions have typically demonstrated higher rates of single occupancy vehicle use than their more central counterparts, and they offer a wide variety of topography, facilities, and levels of service, which I'll go into more detail on in the next set of slides.

These areas were selected in hopes of providing insight into the program's effects and limitations. Creatively speaking, we refer to these areas as follows: in purple is North Portland; represented by beige, we have Southwest Portland; in pink, East Portland. This map displays our new mover target audience. I'll just take a brief moment to go through each specific area so you can get a better idea of what we're dealing with.

North Portland is located roughly 7 miles from downtown. It's a diverse mixture of residential, commercial, and industrial areas. The terrain is primarily flat with sidewalks and bike-friendly streets, which allow for good overall network connectivity. The area includes frequent and standard service bus lines as well as light rail.

Southwest Portland is integrated into downtown and is notable for steep hills and challenging terrain. The region is composed of residential homes mixed with business districts and larger institutions such as Oregon Health and Sciences University. Buses travel the arterials, but biking routes are limited due to the hills. Sidewalk access can be inconsistent at best in the non-business districts.

Finally, East Portland, located approximately seven to ten miles from downtown, is a mixture of residential and commercial areas. Much of the layout is auto-centric with high speed arterials bisecting neighborhoods, making continuity a challenge. Bike-friendly routes have been identified and developed but unpaved roads and a lack of sidewalk connectivity presents barriers. The area is serviced well by transit, primarily buses and light rail. To reiterate, these three areas we chose were very different from one another, geographically, topographically diverse.

Program Delivery

[Slide] How did we deliver this program? We designed SmartTrips Welcome. We wanted a program that would resonate with a wide audience. We wanted the program to be a useful and comprehensive intervention for each region. We started by building on the following five strategies: individualized marketing, customized and personal communications, reinforcement, and encouragement. Over the next several slides, I'll expand on these approaches in a little more detail.

[Slide] One of the reasons SmartTrips has been successful over the years is because participants receive the information they want. I've broken this approach into four steps: 1) connecting with new movers, 2) materials, 3) processing and filling the orders, and 4) personal delivery. Here's, the nuts and bolts.

[Slide] The most important thing is reaching the target audience. We began with three staggered mailers, each with a different approach to encourage participation. The first mailing, as you can see here, was a postcard. It was designed to be humorous and eye-catching and we hoped would stand out from the typical junk mail and motivate folks to go online where we had built the order form in Survey Monkey.

Next, we sent out the paper order form. The paper order form was bold, colorful, about 11" X 17", and included a return addressed mailer that contained inspiring photos and some light TDM information. The inside had over 30 different materials that they could choose from and we grouped them by mode to make them easier to absorb. The final mailing was a reminder postcard, which was simple, direct, and earnest. This mailing encouraged folks to not miss out on this great deal and to get online or dig that order form out of the junk mail and participate.

[Slide] What did we offer? Each order would receive a thank you letter, a pledge form, and a local area coupon sheet. After that, depending on the participant's interest, an order may include neighborhood bike walk maps for all quadrants of the city, walking encouragement information including a pedometer, safety and law information. For biking materials, we offered safety information and way finding items. Transit use was de-mystified by system maps and planning tips and items that catered to families with kids, including school-specific information in a fun workbook, and lastly car share, carpool, and Smart Driving tips.

We used a Microsoft Access database to manually input and record the paper order forms. The online orders were imported directly into the database, which saved a lot of time. That's one of the reasons we so strongly encourage participants to order online. The database allows us to track all material requests, perform queries and organize participant information. After data entry was complete, the addresses were imported to mapping software. We used ArcGIS to plot the locations on a map.

We're fortunate here at the City of Portland offices to have a dedicated production centre where we can sort materials, fill orders and prepare for deliveries. I'd like to note that this program employed three full-time staffers to design, implement and evaluate the program, so this was definitely a team effort. Once the materials were collated and packaged in the reusable tote bag, it was time for the fun part, bike delivery.

[Slide] Delivering orders by bike is actually a cost-effective and efficient method. They place emphasis on the Bureau's commitment to active transportation and provided program participants an opportunity to speak with the transportation expert face to face.

Andrew Pelsma: One webinar participant asked if we targeted multi-residential units in this effort and I'll address that before I move on. We did have some new movers (from multi-residential units.) It was difficult as units often have secured access and sometimes it's hard to get folks the mail pieces that we send out through post. The best approach we've learned is to make sure that you get the apartment managers and the property owners and managers on board and get them involved. We haven't yet targeted any new developments with this program but it's on our radar.

Personalized Communications

We delivered the program through customized and personal communications.   Our experience with behaviour changes shows that starting a conversation about travel behavior is key and being able to personally engage participants is one of the most effective ways to change behavior.

[Slide] We conducted three personalized communications. The first was a follow-up phone call, which was made two weeks after delivery of the individualized marketing materials. This gave the participant the chance to ask a transportation expert questions and for us to provide them with continued support and encouragement. The phone calls were generally very well-received, even if the individual didn't have any immediate questions or concerns.   One thing to note, however, is that this was a very time-consuming effort and, depending on capacity, could be hard to implement on a very large scale.

The second approach we used is personalized emails with transit information. On the order form, we asked participants if they wanted information on a specific transit line. If they knew which lines, we sent along a personalized email with hyperlinks to those transit schedules. If not, we looked up the transit lines closest to their residence and emailed them those.

[Slide] The third approach consisted of targeted electronic messages based on market segmentation. We feel this approach was innovative and quite effective for reaching larger audiences with information relevant to them. In a nutshell, market segmentation refers to using preferences, behaviours, knowledge levels, attitudes, needs, vocations, demographic information - basically any personal characteristic - to strategically separate populations into categories in order to more strongly influence a desired behavior.

We grouped our target population by characteristics that helped us more closely match individuals with the information and services that are most relevant to them.   Our targeted message consisted of two customized and personal email blasts to each participant that strategically addressed or encouraged behavior change unique to them. The first addressed primary commute mode choice. The second addressed primary neighborhood mode choice, as indicated by the online trip diary attached to their order form.

[Slide] The emails themselves had quick tips that highlighted the individual mode choice and location specific to each participant. To make this possible, given limited time and capacity, we divided the target population into three data sets as indicated by their primary mode choice and grouped them by drive-alone, biking and walking and transit, as you can see on the left side of the matrix.

Next, we divided those three subsets by the three geographic regions, north, southwest, and east. This gave us 9 different subsets from which we then crafted nine separate emails, each targeting their unique primary mode choice and their location. If you're interested in learning more about market segmentation and TDM communications, I've written a step-by-step outline that goes into detail on this process and some opportunities to use it for behavior change, especially for transportation, that will be posted on the Tools of Change website.

[Slide] Our third approach was to use reinforcement and encouragement strategies to assist participants with their behavior changes. We sent out 11 monthly communications in the form of electronic newsletters that contained transportation articles and tips. We used market segmentation on the newsletters to make those articles and pictures more relevant to the participant. Pledge forms were used to obtain a commitment and, as Danielle said, were included in every order. Participants pledged to shift trips by week or month from driving alone to walking, biking, public transit, carpool and/or car share. Those who sent back a form and continued to connect with us were entered into drawings for more active transportation prizes.

[Slide] Just a quick run through of our messaging timeline. The program took place in the late summer and fall of 2011. The initial post card draft, the first week in September, was followed one week later by the paper order form, followed two weeks later by a reminder post card. We give them a little bit of time to order material and then send out the initial email blast targeting the primary commute mode in mid-October, followed one week later by the blast targeting primary neighbourhood mode. In mid-November, we followed up with folks that sent in a pledge form.

Keep in mind that, throughout this time, we were also targeting folks with the follow-up phone calls that were coming up two weeks after they've received their materials. Beginning December 1st, we started our monthly electronic communications and newsletters.

Measuring Program Performance

[Slide] There were two main approaches we used to measure program performance: a new mover analysis and a regional analysis.

[Slides] The new mover analysis measured the entire target area population before and after we ran the bulk of the program. [Slide] The regional analysis broke down the data by regions and took a closer look at how each region was impacted by the program.

[Slide] This is the map showing the entire target area. The first thing we did was to establish a control group from the target audience to help account for variables. The group was selected randomly in Excel and our goal was to get around 200 responses from this group.

The remaining new movers made up the target group and that was around 5,400. All new movers, both control and target groups received pre-imposed surveys that were mailed to their homes. The measurement tool, the paper survey pictured here, was issued. The baseline was issued in August of 2011, three weeks before the end of the initial post card drop. We used a staggered three-day mailing to try and mitigate daily fluctuations. The follow-up surveys were done in early November; our metrics included trip diary information, primary and secondary mode choice for commute and neighbourhood travel, demographic information, and an awareness question that asked new residents how easy or difficult it is for them to meet their transportation needs by walking, bicycling, taking the bus, light rail, and/or carpooling.

Responses were mailed in, collected, and entered into a database. To manage these responses we colour coded the survey so the control group was on a gray stock paper and the target on canary yellow; that way, when we opened the envelopes, we knew where they were coming from and which database to enter them into. One downside to this approach, is that it's quite time intensive. An incentive for participation in the survey was a $50 raffle to a local grocery store.

The regional analysis was the second approach for these to measure program performance. This effort was to try and isolate trends and the regional variances as described earlier by Danielle and to reinforce possible success of replication and expansion. Each of these target areas were separated into subsets and analyzed for all trips taken, primary commute and in-neighborhood mode choices, as well as awareness of travel options.

Budget

Linda Ginenthal: I'm going to talk a little bit about the budget. [Slide] The cost for the pilot was about $78,000 and this broke down to about $12.76 per household, $5.59 per person, and $0.07 per driving trip reduced. For our residential program, the cost per person is anywhere from $7-$12, the difference being that we packaged our SmartTrips residential program with hands-on experiential tools (like walks and rides, clinics and classes) that are very labor intensive and very expensive.

Our staffing time was about $42,000, which covered the three SmartTrips staff people, Danielle Booth, Abra McNair and Andrew Pelsma, and my salary for oversight. This is a little bit less than it would be if you were starting out. We are experienced in working with the production centre; we're experienced with the material. We already have material that is developed, maps developed so there would be a higher cost if it was a straight up pilot program. Depending on your experience—and I see many of the folks on this webinar have experience—the cost could be as low as what we have here.

Program Impacts

Andrew Pelsma: [Slide] Before we wrap this up, I'm going to take a quick look at the program impacts, individual impacts including 200 vehicle miles reduced annually per target new mover, 19% and 25% increases in environmentally-friendly and active primary commute and neighbourhood travel mode respectively. For these purposes, environmentally-friendly and active, we included walking, transit and carpool. Overall impacts included over 1 million vehicle miles reduced, a 10.5% reduction in drive-alone trips, and a 13.5% increase in environmentally-friendly mode use for all trips taken. We also had 10.5% of the target audience order materials from the individualized marketing component, and that was definitely one of our goals.

The regional analysis showed improvement in all three areas over their control group counterparts, primary work and neighbourhood mode choice as well as a nice increase in awareness of the local travel options. [Slide] Increased awareness was one of our main objectives and, in our survey, we asked folks "how easy or difficult is it for you to meet your transportation needs by walking, biking, taking the bus, light rail, or carpool?" After completing the program, target area respondents were 12% more likely than our control group counterparts to answer that it was either "very easy" or "somewhat easy" to meet their needs using these options.

[Slide] We had an overwhelmingly positive response from folks who participated in the program. Here are a couple of comments from program participants; our analysis showed that targeting new residents as they are acclimating to their new surroundings is an excellent time to introduce, encourage and support positive transportation behaviour and that a simple, well-timed marketed intervention can make a real difference for travel behaviour change.

Q: How many information packets are compiled annually?

Linda Ginenthal: We had about a 10.5% response rate so of the 5,400 households we had about 550 responses, but that is just the pilot program. Annually, we also do our residential program as well as SmartTrips to school program where we are in 70 or 80 different elementary schools so each of those different programs has this fair amount of response. We've had as many as 8,000 in one year and as low as 5,000 in one year for a combination of these programs.

Q: Why did you pick the three regions you did and not the green area?

Danielle Booth: We wanted to pick an area where it was not the usual suspects. The downtown core and the inner part of Portland is pretty 'meat and potatoes'. There are already a lot of people who use alternative transportation. We really wanted to see if this new residential program would resonate with people who have a bit more difficulty with their transportation options, but we got such positive responses and these areas

demonstrated that we could do this pretty much anywhere we wanted in the city of Portland and get a positive response.

The other reason is, because we are going all around the city, we also wanted to get areas that we hadn't been to in a while with our residential program. This year, we will have completed the entirety of the city of Portland.

Q: Could you expand on the reasoning for targeting new movers rather than the region as a whole?

Andrew Pelsma: This time of change decision context offers a unique opportunity to create what I was saying about new neural pathways. Basically we get into our daily habits and we begin to stop thinking about them as choices, as options. When you relocate, when your surroundings change, when the way to work changes, when the steps to the refrigerator change, you have a unique opportunity to reintroduce different behaviours, new behaviours or strengthen older ones. It's been proven to be a receptive time for behaviour change.

Because we have covered the entirety of the city, one of the things that we want to do is maximize the efficiency of the program. One of the ways to do that is to look at the people who are most ripe for change; those people who are most ripe to change are new residents. We wanted to do this pilot project to identify if in fact new residents would really deliver for the program or the program would deliver for the residents. Now what we're doing is we're looking in 2014 to do a full-scale residential program with all movers in all parts of Portland. This was the pre-cursor to that.

Jay Kassirer: I remember you saying in our conversations that one of the nice things is you get a constantly replenished audience because there are people moving every year. You get a new group that's a good size to work with every year coming up.

A: I think the statistics nationally are about 15% of people move on an annual basis. Some people are moving within their own neighbourhoods but again, it's a kind of change, and as we say, change is good.

Q: Did you check back later to see if it helped people actually change?

Andrew Pelsma: I assume you're referring to long-term program impacts and we did try and account for those, but we ran out of time and had less than desirable follow-up participation. We didn't include it in the presentation but I'd be happy to go into what our approach was and the results were actually quite positive. Basically what we did was to target population participants that filled out their individualized marketing form online. We attached a survey to that, it looked at trips taken, primary, secondary mode choice and awareness, and we use that as the baseline. About 350 of the 550 total filled it out online.

From there we developed a longitudinal panel survey design that followed up with those exact participants one year later. We saw a 9% increase in environmentally-friendly mode choice and a 7% decrease in drive-alone trips, so there was definitely some good retention there, but, as I mentioned, attrition was high. We only saw a 16% response rate. I believe the methodology is sound and the results are good but it was just a low response like panel attrition, which was common in that type of survey design.

Linda Ginenthal: When you are looking at changing people's travel behaviour, once you ride a bicycle or take the bus or walk to a destination, people really like it. Many people have very positive experiences so the first hurdle of actually trying it is much more difficult than keeping it as a habit. You find some people will fall off and go back to their old ways, but really what you're looking at is no one died, nobody has a horrifyingly bad experience and they just continue to do it, or they do it more because it becomes easier and easier as they do it.

Q: Is your staff full-time or do they volunteer, relative to the $42,000 [in staff costs].

Linda Ginenthal: The $42,000.00 is just for this particular program. The staff also works on our SmartTrips residential program, which targets an entire geographic area, not just new residents. We also do a SmartTrips school program and then there are other outreach and education program that all three of the TDM specialists work directly on. The $42,000 is based on this program and no, there aren't volunteers. We do work with volunteers for many of our other outreach program but I don't include a cost for those volunteers. I don't have to calculate that yet.

Q: What about your work with employers? Is it a similar approach?

Linda Ginenthal: It's a somewhat similar approach. One of the nice things about working with employers is that you have adults gathered in a space. Going to an employer is a great way to go. We aren't the main team that works on the SmartTrips business program but we coordinate closely with them and it's a similar approach. They use a lot more email and electronic communications than we do for obvious reasons and they are mostly focused on white collar jobs, but have branched out in the last couple of years with more retail.

Q: Are these target areas within the city limits or do you consider them regional?

Linda Ginenthal: They're in the city limits.

Q: How does the program investment meet city-wide goals plans, and/or investments that offset existing or potential costs of other realities without the program?

Linda Ginenthal: The story I like to tell about the investments is we built a light rail back in 2004; it was completed at a cost of many millions of dollars. For a large-scale TravelSmart program, which was a pre-cursor to our SmartTrips program, we spent about $1 million on the individualized marketing. In the area that was touched by the light rail

program, by introducing light rail this neighborhood had a 3% reduction in car trips; the program area that we covered that included that light rail area saw a 12% reduction in car trips.

Essentially we spent a million bucks and got a 12% reduction in car trips. We spent an unbelievable amount of money for light rail and it got a 3% reduction in car trips. There is a lot of data that says if you build it, they will come but if you promote it, they're going to come a lot more. It's like when you make Coca Cola, it's delicious, it's wonderful, it's fabulous, but really you have to sell it to people. People are just not going to jump on the light rail. They're not going to take the bike and walk without telling about it. We are maximizing our investment in our infrastructure. There's many, many miles of streets out there that are completely under-utilized by bicycling and walking and we want to maximize (rectify) that.

Q: Did the budget include evaluation and survey costs and, if so, roughly what percentage of your budget is evaluation and surveying?

Linda Ginenthal: The evaluation and survey costs were sort of folded into the staff time.

Andrew Pelsma: It seems to be around $10,000. That was primarily the post charge for mailing out those surveys; that was probably the biggest cost of the evaluation besides staff time and putting together and entering and analyzing.

Doug McKenzie-Mohr: I want to ask the three of you a quick question about the survey measurements and whether or not you had any unobtrusive measurements of actual behaviour that's not relying on self-reports. When people are self-reporting their behaviour, and particularly those individuals who are participating in the programs, there's always a possibility of them over reporting what they're actually doing simply because they had this kit delivered to them, they know that they made commitments, etc.

There's also a possibility that there could be an interaction between the survey measurements and the actual strategy; those two things together might be actually bringing about change. The survey itself may be contributing to observed changes in behaviour that are being self-reported. I want to understand whether or not you had any other measurements of changes in behaviour that are relying upon unobtrusive measurements of transportation changes rather than just the self-report.

Linda Ginenthal: Number one, there's no other program, there's no other infrastructure that gets this kind of scrutiny regarding whether or not it changes people's behavior. When we put in a curb extension or a crosswalk or any other kind of infrastructure, we understand that if more people are using it and they say they're using it or there's an observed increase in usage; that's good enough even if we don't necessarily do that. We are given a lot more scrutiny because of the kind of program this is, it's seen as pretty fluffy. Having a control group and understanding that the people who live in Portland understand we want them to walk and bike and take transit because we have a control group.

The question of how many people will tell us what we want to hear…there's actually no other way to mitigate that. I mean, 5% of people think Elvis is still alive, so we figure that the 5% who are in our target group and the 5% that are in our control group are not going to be telling us generally what we want to hear.   We do the best we can with the evaluation. We spend a fair amount of time and energy making it scientifically sensible and then we just look at the raw numbers. The numbers for the places where we have done SmartTrips both with new residents and every place else really show a dramatic increase in the number of people biking and walking and taking transit.

It's growing dramatically and so while there are more people who arrive by bus, we can get the on and off data and things like that. I want to make sure that we are doing our due diligence and really testing whether the program works, but I also don't want us to be tied up so much with this idea that we're going to know exactly how many new trips we're going to get. It's tough that you can't do that with any type of behaviour change. There are so many other factors in people's lives that you can't get that exactly on something like this.

Andrew Pelsma: We have annual bike and pedestrian counts and we rely on the [American Commuting Survey](#) data each year; that's a kind of a measurement for the division and, like Linda was saying, it's difficult to necessarily cull out what is exactly responsible for those increases in ridership or use of a facility if it's the facility itself. It's a combination of everything. I understand your question and I appreciate it and we'd like to find a better way to more directly analyze the behaviour change component, but this is the best that we could do at this point.

Jay Kassirer: Perhaps Doug is asking because we're all trying to find the next better way of doing it and you guys are at the leading edge for Transportation programs.

Linda Ginenthal: Attaching little GPS's to people's ankles.

Jay Kassirer: Thank you again very much for the presentation.

Remaining Questions (answered after the webinar, via email)

Q: Did you do research on which messages were strongest and with whom? It seems saving money is likely the strongest, so is there a reason to push the environmental and health messages?

A: We can't make the assumption that money savings are the most effective message for this program. There are other research studies out there about the efficacy of cost savings, health and environmental messages. What we have found in our work is that the most important messages convey that the transportation choices they are considering making are safe, easy and convenient. Without that, the options are less "doable" and less practical. It is about getting them to make the decision each time they head out the door – getting to behaviour change. The issues around environment seem to be less about

motivating to act differently than to reinforce a choice that they are making (or not making). Cost, while sometimes a factor, rarely is the deciding factor on whether one drives to a friend's house or takes their bicycle. Cost difference for driving are nearly invisible – the next trip is "free" if you have any gas in the tank and free parking. Health seems to motivate folks to get out of their car and bike or walk. The health connects are stronger than the cost factors for short trips.

We use the word "free" all over the materials because people are used to getting stuff they can purchase. It has to state up front that things we are offering are free.

Q: Can you please clarify the differences between how the control group and target group were addressed?

The control group of new residents were randomly chosen and were sent pre- and post-surveys. The target group received the same surveys and also the postcards, order form, and any follow-up communications and information if they chose to participate. Since this was all via mail, the control group would not have any contact with the program other than the surveys.

Q: How would you apply these tactics to new residents in a downtown area where the audience barriers still exist? Denver has almost 3600 residential units under construction in and around the downtown core. I think there is great opportunity for outreach to the future residents.

A: We did some work a few years back in a neighbourhood with lots of apartment buildings and we will do that this year in our downtown core. We work with property managers and such to help gain access and did follow-ups with residents who had limited access to their doors. I think for this type of residential development there needs to be buy-in from everyone. The units need secure and complimentary facilities and the TDM directed to the residents should focus on local facilities, commute options and local destinations (such as grocery, shopping, library, coffee, etc.). If the units are accessible by active transportation that should be a selling point in the initial conversations (another reason to get in with the property managers!) and setting a program up for them as soon as they move in would help to get folks moving in the right direction. Also, if at all possible, price parking accordingly!

Q: Within your budget, can you tell us the total number of hours? You also mentioned increasing their [participants'] commitments over the long-term. Can you provide more details about that?

A: This project represented about 1,500 hours of work by the four of us. Our longitudinal data on SmartTrips residential shows that after two years after a program, residents in the area maintained the same level of trips by environmentally-friendly modes and reduced trips by driving alone. The "increase" comes from assuming that there are people who were part of the program in the two years before that moved away and there were people

who moved in to the area who were not touched by the program and yet the mode shifts were maintained.

Q: Can you please describe your residential SmartTrip program? How many months did it take for you to reach out to your residential targets?

A: I would recommend reading our online SmartTrips reports located at https://www.portlandoregon.gov/transportation/56703. They are chock full of information on our residential program. It has some timeline information as well as other more robust information on how we do the program. In short, we send out 10 waves of initial postcards, order forms and reminder postcards over the course of 14 weeks from the beginning of April through mid July so that we can process orders in a timely fashion. As an example, the 1st postcard goes out April 1 to a tenth of the list, the 2nd postcard goes out on April 8th to the next tenth of the list, the 3rd postcard goes out on April 15th to the next tenth of the list, plus we mail the 1st order forms to the folks who got the postcard on April 1st, etc. This continues with two weeks between the 1st postcard, order form and reminder postcard to all 10 parts of the list.

Q: Where is your funding source?

A: Funding has come from a variety of sources including our own General Transportation Revenue (gas tax, parking fees, permits and fines, and other transportation resources), Regional Transportation money from CMAQ [Congestion Mitigation and Air Quality Improvement Program], Flex Funds, Federal Energy Efficiency stimulus monies, sponsorships from healthcare providers/insurers, and Oregon Business Energy Tax Credits through a pass-through program. Funding has always been a matter of creativity and making a decent case for spending a fraction on encouragement and TDM verses huge sums on capital and operating budgets.

A: How did you incent participation?

A: We had three items people could choose from with their order; we added prizes to specific actions as well such as the pledge. There was also a $50 raffle to incent participation in the survey.

Q: What was the most popular item order?

A: It was the pedometer, followed closely by the city-wide bike map and the neighbourhood bike/walk maps fell in right after.

Q: Was social media used as part of Smart Trips? If yes, how? And if no, why not?

A: We used email communications and e-newsletters. We did not create a Facebook or Twitter account solely for this program. We have SmartTrips social media venues. I think the reason we didn't include this is because we wanted to make sure that the

communications we had were honed and more specific instead of broadcast like our social media postings would have been.

Q: Is there any private investment dollars helping support the project?

A: There have been private dollars in the past through sponsorships.

Q: Is Smart Trips a program of a DOT [Department of Transportation], MPO [Metropolitan Planning Organization], or other organization?

A: We are city government so we are the local DOT. We work closely with our regional partners (MPO) and the state DOT. There are other organizations we will partner with; it just depends on the type of SmartTrips program we do. We do work with our transit agency as they are a key information source.

Q: Why was the Smart Trips approach originally tried?

A: There are two ways to answer this: Portland is one of the most freight-dependent cities in the country. Gridlock is bad for business and our Port. It isn't just a matter of climate change or pollution controls, congestion reduces liveability and makes this city less attractive for employers, new residents, and busy families. Additionally, Portland prides itself on our smart transportation and land use policies that make alternatives to driving not just doable, but preferable to driving. State goals and policies around sprawl and state, regional, and local policies around transportation make bicycling, walking, and transit use a priority. There are lots of policies, goals, objectives and mandates that move the city in this direction. That said, it is also a source of pride for our elected officials to be innovative and lead the nation in our transportation programs. Without their commitment, no policy alone would move the ball.

On a more practical level, our capital dollars dried up in 2000 and so our bicycle and pedestrian programs were combined and turned into a new division called Transportation Options. We were charged with coming up with innovative strategies to promote walking, bicycling, transit use, carpool and car share trips – without capital dollars. We did research and found this program called TravelSmart from Perth, Australia that had enormous success in shifting drive-alone trips to environmentally-friendly trips. We worked with them for two years and then modified their successful program into SmartTrips.

Q: Is the bike delivery of materials outsourced?

A: Andrew Pelsma, Danielle Booth (who made the presentation along with Linda Ginenthal) and their colleague, Abra McNair designed and implemented the program including bicycle delivery. It isn't just getting the delivery to a door; they are experts at outreach and communications strategies for TDM and provide an important link – face to face – with residents. And they love that their jobs are both in the office and in the field.