

Executive summary

Market research.

The University of West England (UWE) and the University of Bristol (UoB) are seeking to build upon initiatives to encourage more sustainable behaviours and transportation mode choices funded by the Department for Transport's (Dft) Local Sustainable Transport Fund (LTSF).

This report summarises market research carried out in order to understand the factors affecting decisions around cycling specifically, attitudes toward transport modes, and to inform marketing and communications recommendations.

Perceptions and priorities.

Across both first and second years, cost and speed were the two most common priorities when students were asked about their commute to university.

In relation to perceptions of cycling, storage concerns, safety concerns and getting hot and bothered are identified by students as barriers stopping them biking more.

However the most common key barrier is that biking is "just not for them". This accounts for roughly a third of students' main reason for not biking over both first and second years. Bound up in both self-perceptions and perceptions of cyclists, this poses the greatest potential for change through marketing and branding.

Segments.

The segmentation is based upon how independent or reliant students are, primarily in relation to travel, and how adventurous or safe they are, primarily in relation to travel. This produced the following segments:

- Freedom Seekers are more adventurous, and their independence is very important to them – they do not like being reliant either on public transport or others to get around
- Safe Travellers are similarly independent, but value adventurousness less, and place an importance on safety and security
- Social Normals are much less motivated by independence, are more concerned with safety, and tend to be even more influenced by social norms than other segments

Recommendations.

The key recommendation is to create an overarching programme uniting the deliver of support services and the development of a communication strategy and brand identity. This programmatic approach will unite activity on both sides of the behavioural challenge:

- A motivational challenge: getting students to **want** to bike more
- A delivery challenge: making it **easier** for students motivated to bike to do so

The programme will serve to:

- Focus attention and resources on both behavioural challenges
- Provide a framework for strategic and informed decisions
- Provide a concrete identity that everyone will know about and be proud of
- Unite efforts toward bold and ambitious goals

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Acronyms.

UWE: University of West England

UoB: University of Bristol

Dft: Department for Transport

LTSF: Local Sustainable Transport Fund

01
Introduction

Project background and definition of sustainable travel.

The University of West England (UWE) and the University of Bristol (UoB) are seeking to build upon initiatives to encourage more sustainable behaviours and transportation mode choices funded by the Department for Transport's (Dft) Local Sustainable Transport Fund (LTSF).

Sustainable travel is defined as a mode of travel that makes a positive contribution to the environmental, social and economic sustainability of the community. As a short-hand, sustainable transport can be usefully categorised using the below 'Sustainable Transport Hierarchy' image. This ranges from the least sustainable transport options (single occupancy car) to the most (active travel).

One area that LSTF WEST is focusing on is engaging people undergoing life stage transitions: these tend to be times in which habits and patterns of behaviour are disrupted, and new ones established.

As part of the LSTF work the following pilot interventions are currently being implemented: a free bike scheme; free cycle training; free bike maintenance workshops; guided group bike rides; and a cycle champions scheme. This market research project ran in parallel to these pilots.



Project background and refining the aims.

The initial project aims were to encourage a range of behavioural changes among students at transition points toward more sustainable travel modes. However, to cover all modes in meaningful depth would require a larger size research project with separate strands.

It was quickly established that there are already incoming and/or well established powerful measures to reduce single-car occupancy, such as increases in student car parking restrictions being phased in over 3 years. It is anticipated these will increase the use of the subsidised university bus service, which requires a large amount of resources. Therefore it was felt there is also a business case for relieving pressure on the service by promoting cycling. Furthermore there are other activities seeking to increase walking and bus use such as:

- Ongoing marketing and promotional activity to increase bus usage
- Creation of maps and online content to encourage walking

It should be noted that to date there are no plans for sustained activity to encourage train use.

Given the large number of students living within a 5km radius of university, encouraging the uptake of cycling was identified as the biggest opportunity. This report summarises the market research carried out in order to understand the factors affecting decisions around cycling specifically, attitudes toward transport modes, and to inform marketing and communications recommendations.



Aims and objectives.

The initial marketing research goal, to conduct research to enable development of appropriate marketing materials and motivational messages to encourage sustainable travel choices, evolved into more a specific behavioural aim:

- To get more students biking to university, and less driving to university

A clear behavioural goal helps to provide focus for producing actionable insight and understanding that supports real impact.

In order to meet this aim, the research sought to address activity around two key behaviour change objectives:

1. A motivational challenge: getting students to **want** to bike more
2. A delivery challenge: making it **easier** for students motivated to bike to do so

These two objectives can be mapped onto Prochaska and DeClemente's Transtheoretical Model of Behaviour Change. The first targets individuals at the Pre-contemplation and Contemplation stages in order to move them toward Preparation. The second supports individuals to move through Preparation to Action and Maintenance.



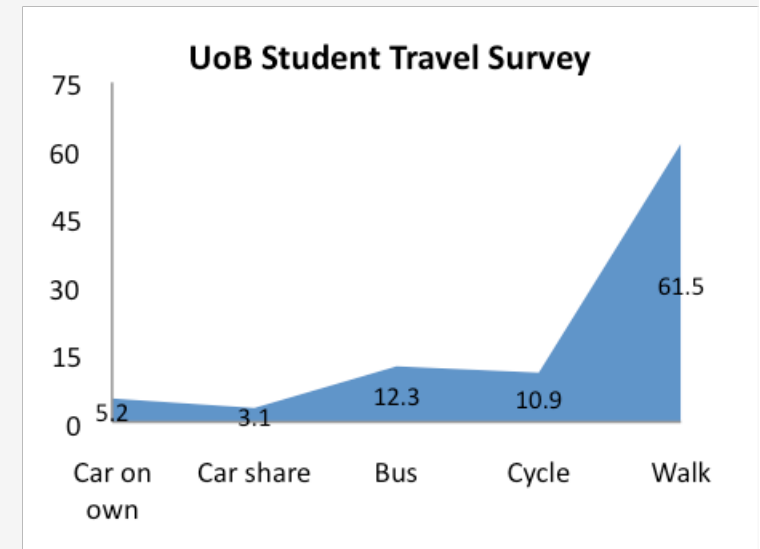
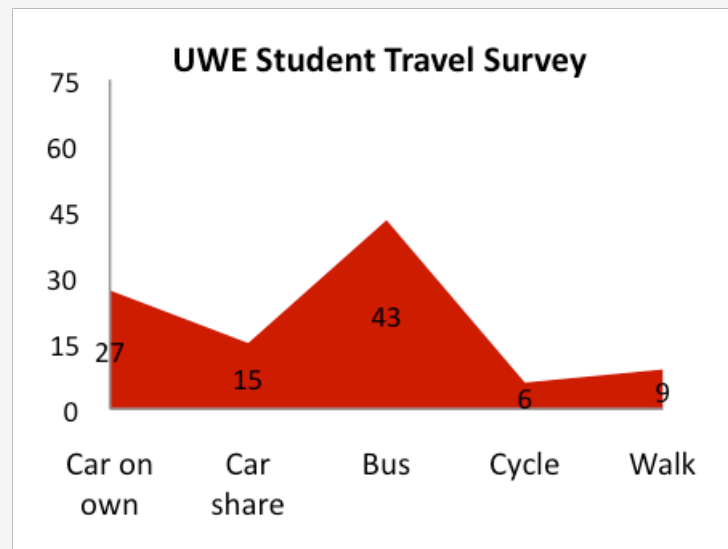
Brief summary of literature review. Full literature review to be found in the Appendix.

Existing travel behaviour.

The charts below gives an indicative travel mode split for Bristol students based on the results of the 2011 UWE and the 2012 UoB travel surveys. The UWE survey measures the travel mode to the place of study and the UoB survey measures general student travel.

UoB has a greater number of journeys at the more sustainable end of the transport hierarchy than UWE. This may be due to the location of the main campuses, the distances from accommodation to the place of study, and the differences in parking restrictions in either area. Also the UWE survey excludes on-campus residents (mainly walkers). Finally it should be noted that when UoB students were asked in the survey about specific journeys to their place of study, a lower 8% responded as cycling.

This gives the impression that cycling rates are probably more similar at the two universities than they first appear. However, the results suggest there is still greater scope for change at UWE, with 85% of surveyed students travelling by car or bus, compared to just 17% at UoB.



Brief summary of literature review. Full literature review to be found in the Appendix.

Behavioural insights.

The UK Department of Transport Behavioural Insights Toolkit (DfT, 2011) identifies the following types of influences on behaviour and uses the example of cycling to work to illustrate these:

- Structural factors, i.e. physical/cultural constraints (e.g. speed and volume of traffic on route between home and workplace)
- Attitudes (e.g. whether like (the idea of) cycling to work)
- Norms (e.g. whether cycling to work is 'normal' for someone like me)
- Cost (e.g. cost of buying or maintaining bicycle)
- Habit (e.g. whether cycling to work is done regularly)
- Knowledge/awareness (e.g. whether know how to ride a bicycle on the roads)
- Capability and self-efficacy (e.g. physical capacity to cycle to work; whether feel confident cycling to work)

Some of these influences on behaviour are beyond the remit of this project, such as improvement of infrastructure, though there is the opportunity to promote improvements/alternative routes that already exist.



Brief summary of literature review. Full literature review to be found in the Appendix.

Perceptions of cycling

Greig (2001) identified a number of predisposing factors that negatively impact on cycling. These are important to identify, in order that strategies can be developed that address them.

Some negative predisposing factors are (not an exhaustive list);

- the belief that cycling is dangerous
- the perception that great effort is required
- the reaction to helmet wearing (a bigger issue in Australia, with mandatory helmet laws)
- limited secure storage
- not being aware of improved cycle ways
- the perception that cycling is something you do before you start driving
- the fitness image of cyclists (for example, athletes or wearing lycra) can also be a barrier to those people who do not currently cycle

Safety concerns, often arising from the speed and volume of traffic and not having designated space for people riding bicycles, and aggressive driving has been consistently identified as deterrents to regular cycling (Greig, 2001).

It is worth noting that concerns about safety are higher among non-cyclists than regular riders (Rissel et al, 2002), with non-cyclists consistently overestimating the level of risk involved. People with varying levels of cycling experience perceive traffic safety differently. Based on qualitative research with women, Garrard (2003) suggests that this it is more to do with skills, self-confidence, experience and route familiarity – when these increase, traffic safety concerns decrease.

Perceptions of cycling may also be based upon inaccurate knowledge or gaps in awareness, such as the relative costs of different transport modes.

Brief summary of literature review. Full literature review to be found in the Appendix.

Perceptions of cyclists

Some recent research suggests image is being increasingly recognised as an important factor in influencing an individual's likelihood to cycle (Daley and Rissel, 2011). In a recent study, Gatersleben and Haddad (2010) examined the views held by UK adults about the typical UK cyclist by exploring perceptions about possible cyclist stereotypes. Findings identified how negative cyclist stereotypes may act as a barrier to cycling uptake in non-cyclists.

Leonard et al (2011) explored the image of cycling using the theory of self-concept. This is a theory often applied to traditional marketing practice, whereby consumers are more likely to choose products or brands that 'fit' with the image they have of themselves (or an idealised image they attain towards). Leonard et al (2011) applied this to the area of travel mode shift (in particular, moving from driving to cycling). In marketing theory, product image consists of not just the image but the stereotype of the generalised users of the product (Sirgy et al, 1997). Applied to cycling, this means it is important to understand what perceptions and stereotypes people have of other cyclists, as this may impact the choice of whether someone starts cycling.

From the Leonard et al (2011) research, groupings of cycling segments became apparent such as 'environmental activist' or 'sporty commuter'. Many of these segments have negative connotations; however findings showed the image of the 'leisure cyclist' out for a gentle ride had a more positive connotation. This may be more in-line with some individuals self-concept, so using the positives from leisure cycling may be a gateway to utility cycling.

Chaterjee et al (2013) supports this, with findings from a qualitative study suggesting that leisure and fitness interests can often be a trigger for more regular utility cycling.

Brief summary of literature review. Full literature review to be found in the Appendix.

Habits and transitions

Daily travel behaviour, in particular mode choice, is seen as a habitual act, to the extent that the prospect of change is inhibited or prevented (Verplanken et al, 1997, Kenyon and Lyons, 2003). The Dft Behavioural Insights Toolkit (DfT, 2011) notes that timing is important for breaking habitual behaviour with moments of change ('periods of transitions such as going to university, starting work, moving house, changing job, or retiring') providing 'windows of opportunity' when behaviour is consciously considered.

Ouellette & Wood (1998) support this, and suggest two criteria for breaking habitual behaviour are a change in situational context and an increase in consciousness of the behaviour. This has been shown in practice in the review of the 'Effects of Smarter Choice Programmes in Sustainable Towns' (Sloman et al, 2010). In this study it was noted that the biggest falls in car driver mode share were among groups at either a point of change in their lives or at a reduced income.

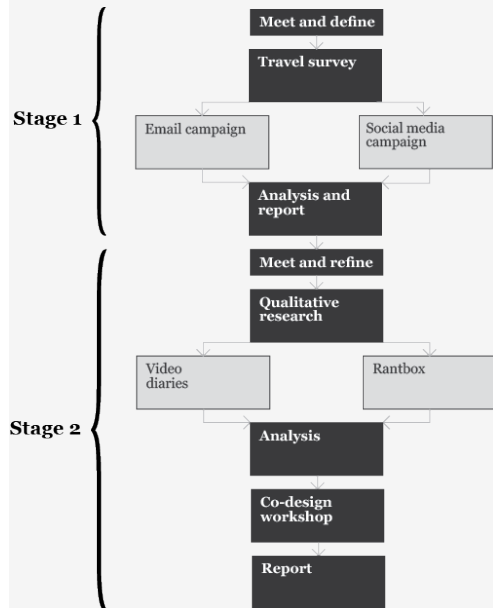




02
Project delivery



The project was structured two phases.



Phase 1: quantitative online survey.

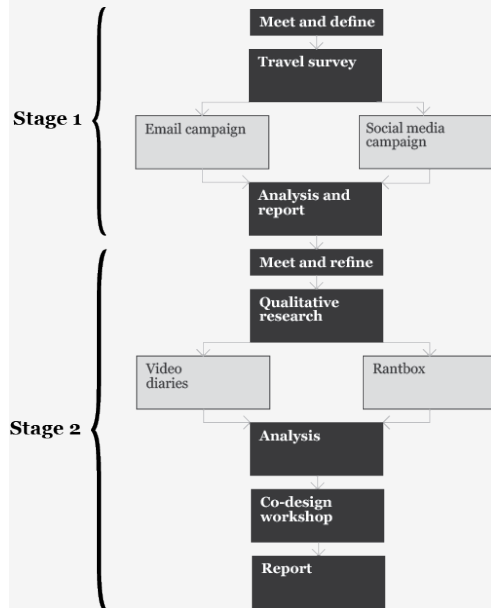
The targets for surveys was set by the required sample size per year at each university. The table below includes the sample sizes based on each year’s population, a confidence interval of +/- 5, and a confidence level of 95%. The number of surveys completed is also displayed.

	1 st year target	2 nd year target	1 st year responses	2 nd year responses
University of West England	361	361	727	414
University of Bristol	351	351	860	89

The survey was primarily marketed through an email campaign, supplemented by a social media campaign. A mini-workshop with students helped to design the content, tone, language and visual style of the email and social media activity. Students were incentivised to take part by the chance to win a £10 prize.

The campaigns were very successful for three populations, far surpassing required sample sizes in some cases by double. However UoB 2nd years had a very small response. It is believed that his is due to the timing of the campaigns which went to their university email address during a period when UoB 2nd years tend to be abroad or on holiday.

The project was structured two phases.



Phase 2: qualitative interviews and video diaries.

Researchers conducted a series of interviews with students using the Rantbox, a mobile touring consultation method that allows our researches to go to the participants. Researchers spoke to 24 students using a discussion guide based around the literature review.

Students were also asked to contribute through conducting video diary tasks using their smart phones. Tasks included gathering contextual information about their living situation, interviewing flat mates or friends, and capturing their experiences of commuting to university. The research target was for four participants, and students were recruited through earlier research activity, and incentivised to complete each task. Three students agreed to participate, however one fell ill during the research period, so two completed video diary activity.

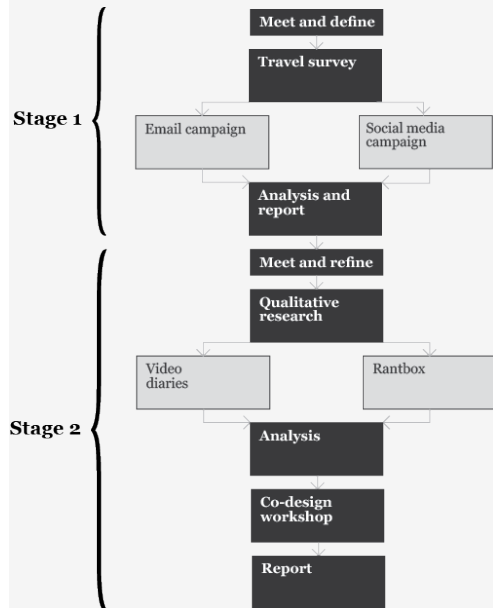


Rantbox interview



Video diary task

The project was structured two phases.



Phase 2: co-design event.

Members of the target audience, professionals and stakeholders attended a co-design workshop. Workshop participants were presented with a summary of key themes and actionable insights, and then worked through a range of facilitated insight based tasks and activities.



Co-design workshop tasks



Co-design workshop tasks



03
Research results

Introduction to focus on producing actionable insight.

NB data displayed is for UWE, unless UoB results are interestingly different.

For the purposes of this report and maintaining project momentum into the development and implementation of marketing interventions based on this insight, the focus in the research results and recommendations is on identifying **opportunities** and **actionable insight**.

The insight in the following pages serves to provide the understanding of the audience necessary to develop marketing interventions. With both quantitative and qualitative data available, they have been woven together where they complement each other.

Research was conducted at both universities, and some differences between students drawn apart at points within the analysis in this report and many of the recommendations are relevant to both populations. Where there are university specific recommendations the primary focus is on UWE students, with a secondary focus on UoB. UoB already has a greater number of journeys at the more sustainable end of the transport hierarchy than UWE, though there is scope for improvements.

The market research insights predominantly deal with tackling the first behavioural challenge, namely motivating students to **want** to cycle. The insights are divided into:

- Student's travel priorities, perceptions and motivations
- Student's perceptions of cycling
- Student's perceptions of themselves and cyclists
- Segmentation based on level of independence and adventurousness



03

Research results

Travel priorities, perceptions and motivations

Student's priorities regarding the commute to university.

Across both first and second years, cost and speed were the two most common priorities when students were asked about their commute to university.

Cost.

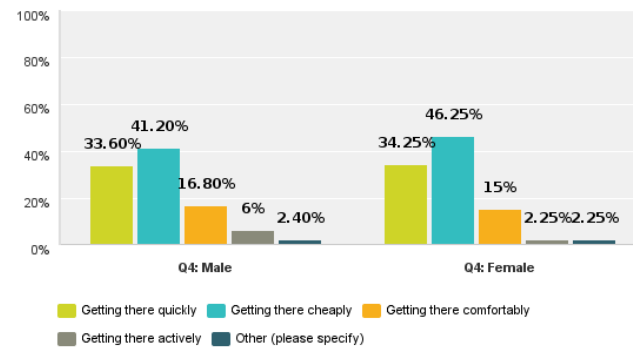
The survey results demonstrated that most first years prioritise cost as the most important aspect of how they get to university. This was true across both males and females, and probing into this aspect in the qualitative interviews revealed this priority tended to be matched with other money saving behaviours. This priority could potentially be used as a motivating lever to inform messaging communicating the money saving aspects of bicycling.

Speed.

For second years, the most frequently prioritised aspect of their commute is speed and getting to university as quickly as possible. This was borne out in the interviews in which second years tended to value additional time spent in bed before lectures, and also with more commitments outside of university, the ability to travel to other locations faster. Again an opportunity presents in terms of messaging around the speed of cycling in comparison to the other modes.

Q48 What is the most important thing about getting to university for you?

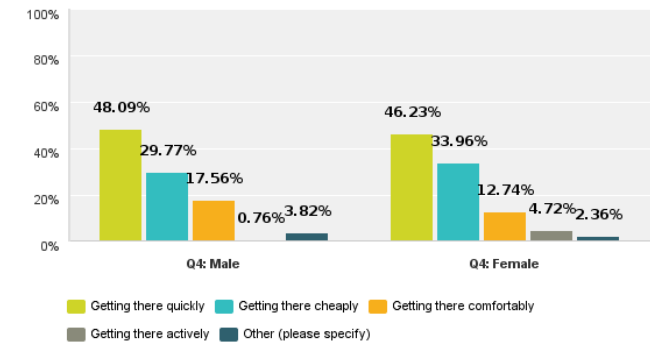
Answered: 650 Skipped: 77



First year priorities

Q48 What is the most important thing about getting to university for you?

Answered: 343 Skipped: 71



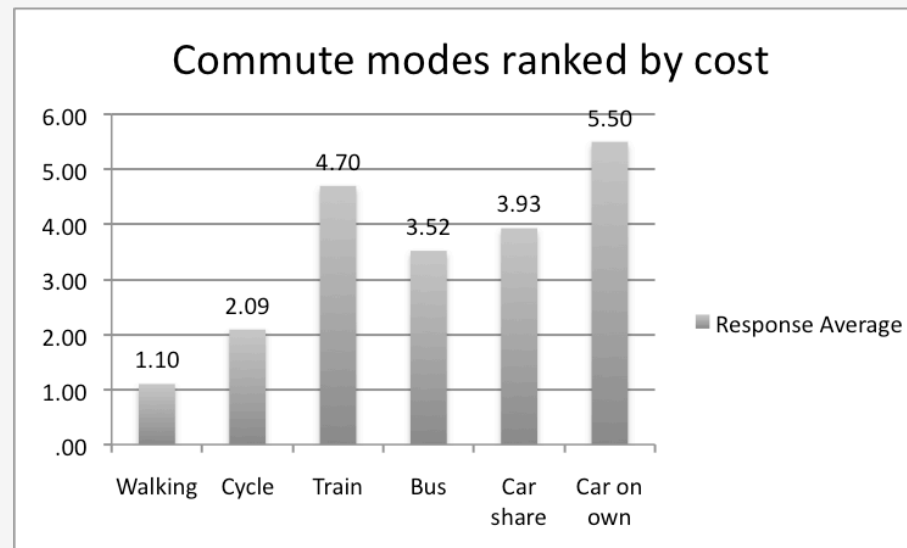
Second year priorities

Student's perceptions regarding the cost of modes.

Cost perceptions.

Given the fact that the cost of student's commute is a key priority for both years, it was important to identify how students perceived the relative costs of the various transport modes. This would serve to guide us as to whether there were any gaps in knowledge or awareness regarding the relative costs of modes that could potentially be tackled later, for example either underestimating the costs of car travel, or overestimating that of cycling.

When students were asked to rank the various transport modes by cost from least (1) to most (6) expensive, travel by cycle came out as the second cheapest mode overall. Interviews revealed some variation in how students estimated the costs of biking, and what they included in that estimation. For some, this included a whole package of special clothes and cycling gear such as gloves, a perception that could potentially be reconfigured through messaging.



Cost ranking, both years

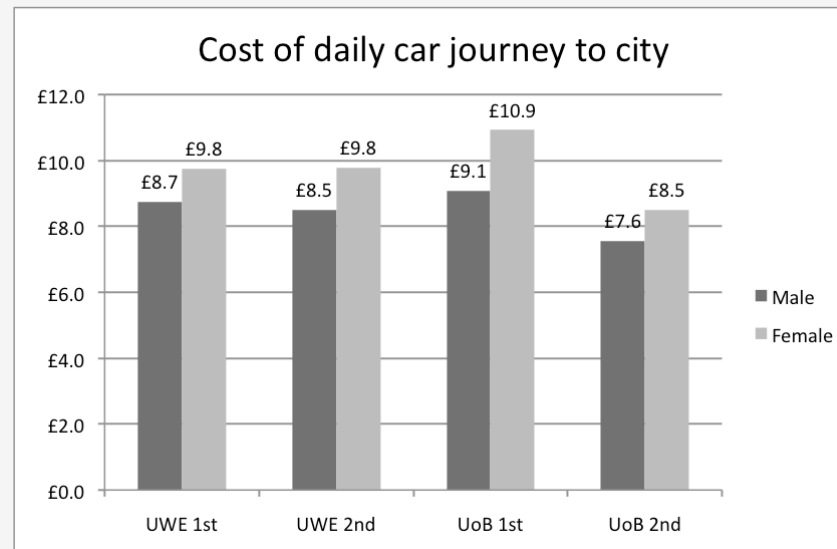
Student's perceptions regarding the cost of modes.

Cost perceptions.

We asked students to estimate cost of travelling daily to the city centre by car (including fuel and parking). Their estimates ranged from £7.60 to £10.90, and females estimated the cost to be higher than males.

Comparing this to our calculations of the actual daily cost, it seems as though students are actually overestimating the cost of car travel. We took a typical fuel cost quoted at 25p per mile by the AA and, assuming a journey to the Bristol centre of 3-4 miles each way with £5 parking costs, calculated total costs are in the region of £6-£7 per trip.

It may be that respondents are projecting additional upfront costs such as the price of the vehicle and depreciation, insurance, car tax, maintenance etc. However, it is likely that the parents of many students would cover these costs, so they may be less relevant in terms of their perceptions of costs. That they are overestimating the costs suggests that perceptions in this regard do not need to be realigned.



Daily car cost estimates

Cost as a motivator on travel behaviours.

Cost as a motivator.

While there is not a great deal of literature around cost as a motivator for change specifically in student travel behaviours, there are some examples which suggest that travel behaviours and choices are influenced by costs.

In the Effects of Smarter Choice Programmes in Sustainable Towns study (Sloman et al, 2010) referred to in the literature review, it was noted that the biggest falls in car driver mode share were among groups at either a point of change in their lives or at a reduced income.

In a Transport for London research paper discussing the Car Ownership & Use Exploratory study (2008), a motivation or desire to save money was identified as one of the key reasons people made a change and switched from car use.

Finally, an American 2009 study into student attitudes and behaviours toward public transportation found that 53% of respondents stated that increased fuel prices had resulted in them taking fewer trips, and 33% stated that it has caused them to shift modes, with most shifting to either walking (22%), biking (14%), or riding the bus (8%).

Cost as a motivator on student travel behaviours.

Cost as a motivator.

Our research found that students are generally very motivated by saving money, and they state this is a large influence on many of their behaviours, from leisure activities to their food choices. As the literature suggest people are influenced by costs and the motivation to save money in their travel choices, and as students state cost is a large influence on other behaviours, we are assuming that costs and the desire to save money are strong motivations and influences on student travel behaviour as well. This should be tested and confirmed in the development stage subsequent to this project through piloting messages and gathering feedback from students.

“Nobody can really afford to go out in Bristol more than once a week at most, we’re all living near the bread line”

Female second year

“I always try to go for cheapest alternatives in shops etc. Cycling saves me the most money as travel is so expensive”

Male second year

“There is the bus, but it’s mainly for financial reasons that we all walk to uni”

Female second year

“I’m pretty money conscious, I buy cheap food and would never get a taxi.”

Female first year

Caveats on cost as a motivator.

The competition to cost as an opportunity.

While promoting cycling through communicating cost savings presents an opportunity to change behaviours, there is competition: the free bus pass that first years receive. This reduces the power of messaging around cost savings. First years themselves identified this as a key reason why messaging about cost exclusively may be unlikely to gain a great deal of traction with this group.

However, there is another opportunity during the transition from first year into second year, when the free bus pass is no longer available and students seek alternative means of commuting to university. For this reason, using cost savings as the primary marketing message is likely to be much more effective with second years than with first years.

“Because of the free pass I’m keen to take the bus. Next year I’ll bike because it’s cheaper”
Male first year

“If they didn’t give you a free bus pass more people would cycle or walk”
Male first year

Student's perceptions regarding the speed of modes.

Speed.

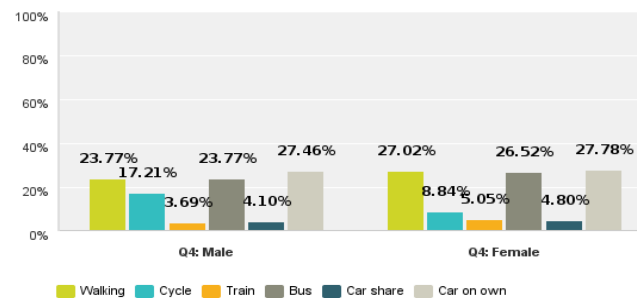
A big priority for students is getting to university quickly, so we explored their perceptions regarding the fastest way to commute to university. First years at UWE tended to think that driving, getting the bus, and walking are the quickest ways. There is a gender divide on biking, with about twice as many males as females picking that as the quickest way. The picture among second years is similar: driving is also picked by most as the quickest way. Females see a large increase in car sharing as a choice, and males see a large increase in biking, at the same time that walking sees a large fall.

This provides a key opportunity to reconfigure perceptions around the speed of commuting by car to university. While there is some existing marketing communicating this, for example the Travel Challenge (a race between 6 modes from Gloucester Road to Frenchay campus demonstrating cycling as the fastest mode), the message does not seem to be penetrating as deep as would be wished.

It should be noted also that the perception of the speed of a bike journey tends to include activities both before and after the journey such as changing into cycling clothes, showering, and changing into normal clothes. These mean that though students may think the journey itself is quicker by bike, the entire experience is perceived as longer.

Q47 Which do you think is the quickest way to get to university?

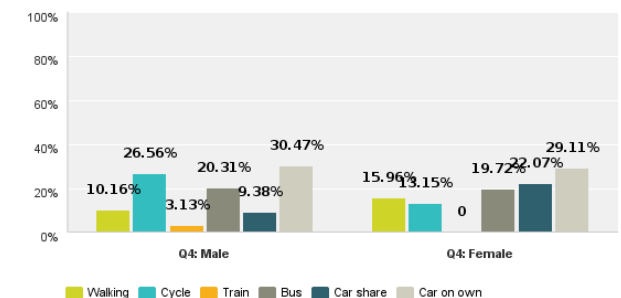
Answered: 640 Skipped: 87



First year perceptions

Q47 Which do you think is the quickest way to get to university?

Answered: 341 Skipped: 73



Second year perceptions

Student's perceptions of speed of modes.

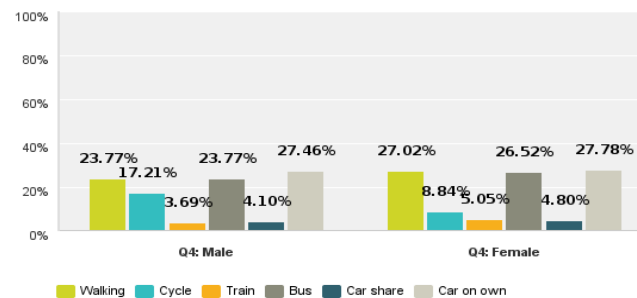
Speed.

A notable contrast is found between UWE and UoB first years in relation to the perceptions of the fastest commute mode. Male UoB first years most commonly picked cycling as the fastest commute mode, and even female first years picked it almost as frequently as the most common choice, taking the bus. It is likely that the explanation for this is that the distances involved in travelling from halls to campus for UoB students is considerably less than for UWE students, though were this to be the case we might expect to see walking being picked more often.

Another possibility is that, with the higher rates of cycling at UoB, one explanation may be that more of the first year students have previous first hand experiences of cycling at home prior to coming to university and this informs their perception that it is faster. UWE students who may not have been cycling as much at home may therefore be relying on potentially inaccurate perceptions and assumptions.

Q47 Which do you think is the quickest way to get to university?

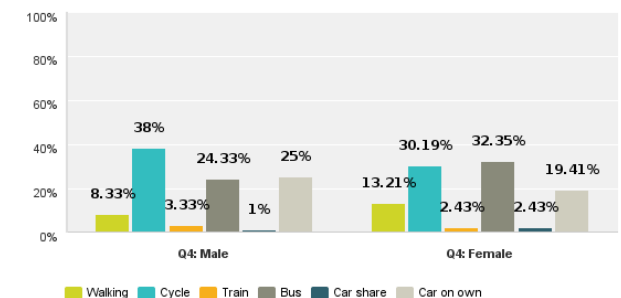
Answered: 640 Skipped: 87



UWE first year perceptions

Q47 Which do you think is the quickest way to get to university?

Answered: 670 Skipped: 190



UoB first year perceptions

Student's wider motivations for traveling around Bristol.

Socialising versus studying.

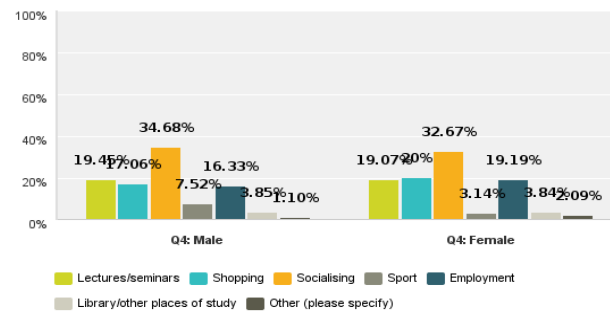
The survey also probed into general reasons for travelling around Bristol. Here we see that there is a large change in the reasons for travelling between the first and second year. First years tend to envisage socialising will be the predominant reason they travel, followed by lectures and shopping and employment.

This pattern is reversed in second years, who pick the predominant reason as attending lectures, followed by socialising and shopping, while employment falls off.

This pattern potentially provides an opportunity to base messaging around the social aspects of more sustainable modes, for example group bike rides or walks. It is also worth bearing in mind that socialising among students will generally involve alcohol consumption, as borne out in interviews. Students stated that they would generally chose to travel by bus or walking if they were socialising as biking while drunk is unsafe. In addition to this, as the time of socialising is generally in the evening, it came with a associated perception that biking in the dark at a time of higher traffic levels is particularly unsafe, especially among females.

Q15 What will be the TWO main reasons for you to make journeys around Bristol?

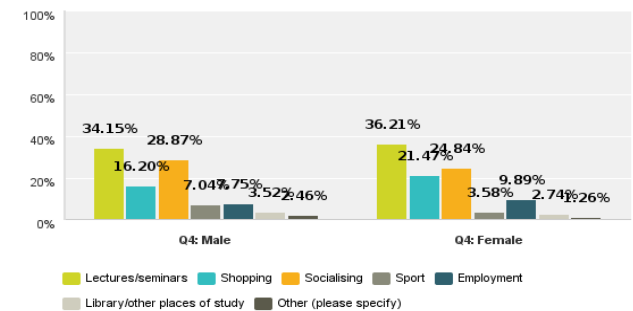
Answered: 709 Skipped: 18



First year motivations

Q29 What are the TWO main reasons you make journeys around Bristol?

Answered: 386 Skipped: 28



Second year motivations

UoB student's wider motivations for traveling around Bristol.

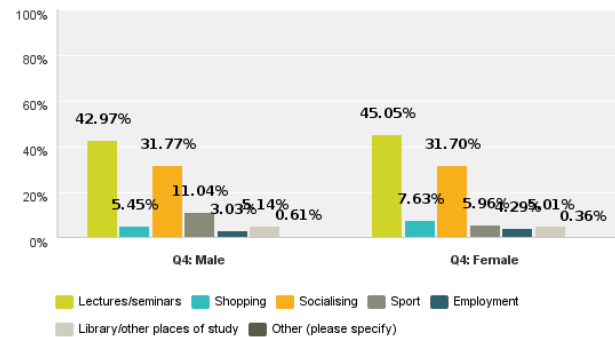
UoB studiousness.

This question revealed another difference between UoB and UWE students. In a reversal of the trend at UWE, socialising takes second place in favour of lectures as the most common reason for travel, and shopping gives way to sport. These differences may well be a reflection of a different sociodemographic make up of the student population at UoB.

This insight was expanded on in the video diaries in which the UoB student explained that one of the main reasons she doesn't bike to university is because she has to carry so many materials and books.

Q21 What will be the TWO main reasons for you to make journeys around Bristol?

Answered: 754 Skipped: 106



“I’ve often thought about cycling but as an art student I have too much stuff to carry”
 Female 2nd year

03
Research results
Perceptions of cycling

Student's perceptions of cycling.

Perceptions of barriers.

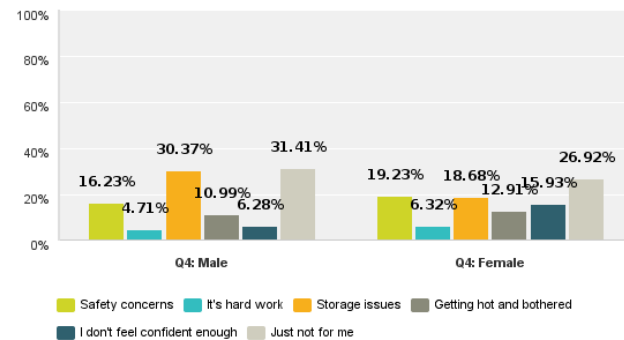
In addition to identifying opportunities and triggers to use existing priorities and perceptions to motivate behaviour change, research sought to identify the potential barriers to increasing uptake of cycling among students.

Male first years identify storage concerns as a key barrier as do females, both males and females state safety concerns are an issue (more females than males), and more females state getting hot and bothered stops them biking more. This pattern changes somewhat in the second year, with more males picking getting hot and bothered as a key barrier as fewer cite storage issues, while females seem more concerned with safety and similarly less with storage issues.

However the most consistently high barrier is that biking is just not for them. This accounts for roughly a third of students' main reason for not biking over both first and second years, and as such poses the greatest potential for change if it can be reduced or overcome through marketing messages. Safety concerns, storage issues, and to some extent the hard work involved are most obviously about infrastructure and environmental realities such as availability of bike racks, safe bike routes and lanes, and distances and hills on the commute route.

Q41 What is the main thing stopping you biking more often?

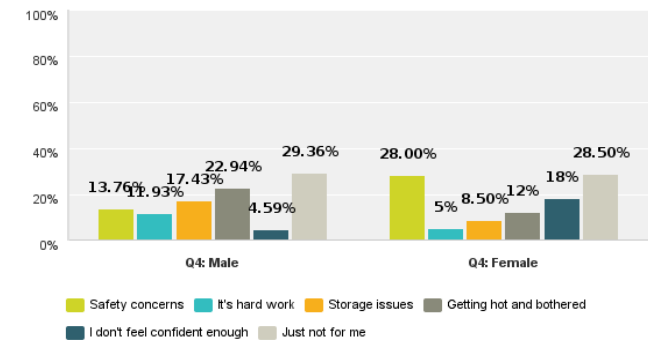
Answered: 555 Skipped: 172



First year perceptions

Q41 What is the main thing stopping you biking more often?

Answered: 309 Skipped: 105

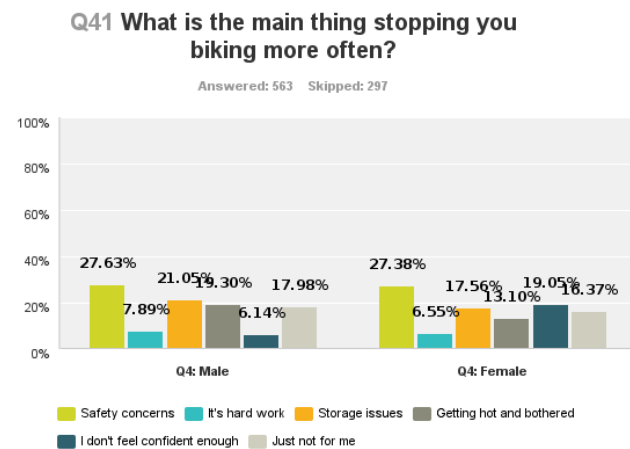


Second year motivations

Student's perceptions of cycling.

UoB Perceptions of barriers.

Once more there are some differences between UoB and UWE students in relation to their perceptions of cycling. UoB students are more often concerned with safety issues and getting hot and bothered than UWE students, and less concerned with storage issues. The students frequently mentioned concerns about cycling around cars in the interviews. This is somewhat surprising as traffic levels are higher and roads less cycle friendly at UWE's Frenchay campus compared to UoB.



“Cars just don’t really car about cyclists at all.”
 Female

“I don’t feel at all confident cycling in traffic.”
 Male

03

Research results

Perceptions of themselves, cyclists and drivers

The match between perceptions and self-perceptions.

Self-perceptions.

“It is just not for me” presents as the largest consistent barrier to students biking more often, and is an example of incongruency between self image and perceptions of cyclists. The relationship between students’ self-perception and their perceptions of cyclists is a key opportunity.

Marketing and branding can help to bridge any gap that may exist between self-perceptions and perceptions of cyclists, and reduce this barrier to behaviour change through altering perceptions of cyclists, and aligning them with individuals’ self-image.



The match between perceptions and self-perceptions.

Perception of themselves, cyclists and drivers.

Students were asked to create a self description by picking from a list of characteristics and descriptions. These were identical to those used in earlier primary research (see Literature Review to be found in the Appendix).

The top 5 characteristics across all interviewed are below. Notable incongruencies are that students perceive cyclists as *more*: environmentally aware; more fitness conscious; more money conscious; more adventurous; and more outgoing than themselves.

This suggests marketing stressing the green, healthy or money saving aspects of cycling may not resonate with students' self-perceptions. Students may not have picked money conscious here though due to desirability bias, as the anonymous survey saw most picking cost as a key priority to them.

Self-perception.

I am:

1. Happy
2. Independent, outgoing
3. Had a happy childhood
4. Hard working
5. Confident

Perception of cyclists.

Cyclists are:

1. Independent
2. Environmentally aware, fitness conscious, money conscious
3. Adventurous
4. Hard working
5. Confident, outgoing

Perceptions of drivers.

Drivers are:

1. Independent
2. Conventional
3. Confident, outgoing
4. Achiever
5. Hard working, money conscious

04
Segmentation

Segmentation overview.

Audience understanding and targeted messages.

A key aspect of ensuring insight is actionable is breaking down the student population into subgroups or segments. With self-perception and identity playing such a large role in students' relationships with cycling and travel modes, it is vital that they are not treated as a homogenous mass.

Splitting the population into groups with shared characteristics, perceptions and priorities ensures messaging is targeted, and appropriate to the types of students any campaign is seeking to engage.

Segmentation.

The two aspects by which the student population is split up in this model came out strongly in the qualitative interviews as key underlying factors influencing attitudes and behaviours around travel mode choice.

Other potential aspects, such as attitudes to the environment or sustainability or degree of cost consciousness either did not seem to exert a large influence on behaviours in the case of the former, or seemed to be common to all students (i.e. did not segment them) in the case of the latter.

The segmentation is based upon the following aspects:

- How independent or reliant they are, primarily in relation to travel
- How adventurous or safe they are, primarily in relation to travel

In combination these pull the population apart into segments which tend to share common behaviours, perceptions and priorities.

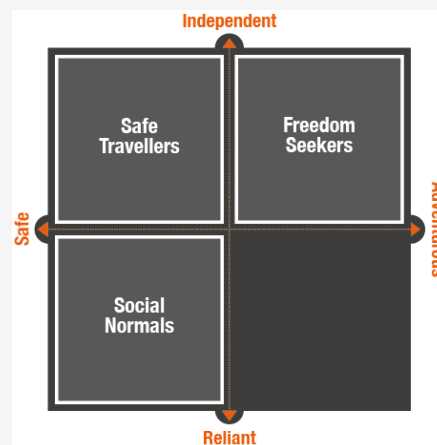
Segmentation overview.

Segments.

Where these aspects combine different segments arose from the qualitative insight, with differing levels of independence and adventurous, and thus requiring different marketing tactics and messages. Using proxy measures from the earlier quantitative survey data, the segments were estimated to be roughly equivalent in size, apart the combination of adventurous and reliant. This was found in very few respondents, and so the recommendations focus on the other three.

- Freedom Seekers are more adventurous, and their independence is very important to them – they do not like being reliant either on public transport or others to get around
- Safe Travellers are similarly independent, but value adventurousness less, and place an importance on safety and security
- Social Normals are much less motivated by independence, are more concerned with safety, and tend to be even more influenced by social norms than other segments

The segments are described in more detail in the following pages. Recommendations for messaging messages and activities (pgs 52, 53) indicate which segments they target through both the content of the messages, and type of activity.



Segmentation detail:

Freedom Seekers.



Independent and adventurous.

In terms of demographics, more likely to be male than female and come from a mix of urban and rural backgrounds. This background plays out in the way in which the desire for independence and self reliance that is so important to the segment found its outlet. Those from a rural background tended to learn how to drive to cover the distances involved in travelling to see their friends, whereas those from urban backgrounds could rely on public transport infrastructure, or safer cycling routes than country lanes. If a driver they tended to learn at a very early age from their family of drivers.

General life priorities include fun and enjoyment being placed highly, a value placed on living a free or unencumbered life, and reveal a generally self-oriented and self-reliant attitude. This is evident in their travel priorities, where having to rely on others is viewed negatively. Simplicity, speed, and self-controlled modes are preferred.

They tend to have positive perceptions of cycling, even the drivers viewing it as safe and speedy way of getting around. They tended to accurately pick cycling as the fastest way of travelling four miles across Bristol in the morning. It should be noted though that even the die hard cyclists state the weather has a big influence on whether they would cycle or not.

**Segmentation detail:
Freedom Seekers.**



Independent and adventurous.

Self-perception:

- Happy, independent, outgoing
- Adventurous, had a happy childhood
- Confident, fitness conscious, hard working, rebel

Perception of cyclists:

- Fitness conscious
- Adventurous, environmentally aware, independent, money conscious
- Hard working

Perceptions of drivers:

- Independent
- Conventional
- Achiever, confident, hardworking, money conscious, outgoing

Freedom Seekers quotes.



“The car was the only way for me to get to see my friends, and have my independence.”
Female

“For me cycling equals freedom, and I only have to rely on myself.”
Male

“Passing the test was great, I could see friends who lived further away – independence!”
Female

“The speed of getting through traffic on a bike makes it less frustrating, and getting to uni quickly and sleeping longer is cool.”
Male

Segmentation detail:

Safe Travellers.



Independent and safe.

Safe Travellers are slightly more likely to be female than male and like Freedom Seekers come from a mix of rural and urban backgrounds. They also place a high value on gaining and maintaining their independence as an individual. They are more likely to drive or walk.

In terms of life priorities and values, they tend to place a lesser importance on adventure, challenge and change. They are more social and place family and friends as of importance to them. This comes with a desire to fit in and gain social acceptance.

Their travel priorities see them valuing safety and security highly, and also describing themselves as lazy in terms of travel and see biking as involving a great deal of effort. Their travel perceptions reinforce their priorities with security and safety, and they are concerned that cycling is dangerous, a hassles, and worry about storage issues. They may also have had a bad prior experience with cycling, either and accident or witnessing an accident.

Segmentation detail:

Safe Travellers.



Independent and safe.

Self-perception:

- Independent, had a happy childhood
- Confident, fitness conscious
- Achiever, happy, outgoing

Perception of cyclists:

- Independent
- Fitness conscious, environmentally aware, money conscious
- Confident

Perceptions of drivers:

- Independent
- Confident, outgoing
- Conventional, achiever, daring, rebel, shy

Safe Travellers quotes.



“It’s a faff having to lock your bike up, I don’t want to worry about it getting stolen. I just don’t see myself figuring out bike logistics.”

Female

“I am scared of cycling, even looking at cyclists scares me, I don’t understand why some don’t wear a helmet.”

Female

“I used to cycle in London but I’m scared to now after having 2 accidents.”

Male

Segmentation detail:

Social Normals.



Reliant and Safe.

Social Normals are more likely to be females than males, and more likely to still live at home. They tend to come from a mix of urban and rural backgrounds, and if they drive, they tend to have learned much later than other segments. They are more likely to either take the bus or walk.

In terms of life priorities, social acceptance and fitting in is more important than for any other segment. Their social groups have a big influence on them as belonging is an important part of their identity. They are much less urgently motivated by freedom and independence, and tend to be quite other-orientated, placing friends and family high and being aware of responsibilities and dependencies. They may tend to be less engaged with decision taking, and more habitual and passive. More likely to consider behaviour change if seen as the norm. May have some aspirations toward becoming healthier or active.

Convenience and ease are the most important aspects of travel for them, and safety is a high priority too. They tend to perceive cycling as unsafe, though they have no misperceptions about how fast it is, picking it out as the quickest way of covering 4 miles in morning traffic in Bristol.

They tend to have the perception that biking would make them stand out from the crowd, and involves having to wear special or silly clothes and gear.

Segmentation detail:

Social Normals.



Reliant and Safe.

Self-perception:

- Happy, hard working
- Achiever, confident, money conscious
- Boring, conventional, environmentally aware

Perception of cyclists:

- Environmentally aware, hardworking, independent, money conscious
- Adventurous, confident, fitness conscious, happy
- Cheeky, daring, free spirit, outgoing

Perceptions of drivers:

- Boring, confident
- Conventional
- Independent

Social Normals quotes.



“I really want to try doing more sport now I’m here, I can see so many people being active and healthy and joining clubs etc.”

Female

“If I were with a bunch of friends I’d definitely take the bus as it’s more social and I wouldn’t want to miss out.”

Female

“Safety on a bike is a bit worrying, the traffic and falling off concerns me.”

Male

05

Recommendation

A sustainable travel marketing programme

05 Index to recommendations

Detail

Pg 49

Pg 50

Pg 52

Sustainable travel programme								
Sustainable travel brand								
Brand value: diversity				Brand value: real experiences				
Key opportunities	Students prioritise fast transport	Students prioritise cheap transport	The power of social norms	Support those with low confidence	Reconfigure perception cyclists not achievers	Reconfigure perception cycling hard work/ complex	Reconfigure perception cycling is dangerous	Some students fitness conscious
	Reinforce perception that cycling is the fastest	Reconfigure misperceptions of bike costs	Communicate diversity of cyclists	Encourage students to take small steps	Promote famous cyclists	Reconfigure perceptions	Framing statistics and relative safety	Promote cycling as free way to fitness
Key messaging aims	Reconfigure perception that driving is fastest	Make savings visible and tangible	Peer messaging to use social norms	Positive experiences to build confidence	Target those who see themselves as achievers	Portray cycling as easy	Promote safe cycle routes	Promote cycling as easy way to fitness
	Freedom Seekers Safe Travellers	Freedom Seekers Safe Travellers Social Normals	Safe Travellers Social Normals	Freedom Seekers Safe Travellers Social Normals	Freedom Seekers Safe Travellers	Safe Travellers Social Normals	Freedom Seekers Safe Travellers Social Normals	Freedom Seekers Safe Travellers
Recommended activities	Viral Video	Myth Busting	Cycle Champs	Bike for a Bit	Cycle Stars	Flash Mobs	Framing stats	Free Fitness
	Giveaways	Better than Bus	Bike for a Bit	Fair Weather		Signposting Graffiti	Relative stats	
	Sleep In	See How to Save	Fair Weather			Safe Routes		
	Travel Times					How to videos		

Overall recommendation.

Key recommendation.

The key recommendation is to create an overarching programme uniting the deliver of support services (such as the pilot interventions being delivered already), and the development of a communication strategy and brand identity. This programmatic approach will unite activity on both sides of the behavioural challenge:

1. A motivational challenge: getting students to **want** to bike more
2. A delivery challenge: making it **easier** for students motivated to bike to do so

The pilot support services and infrastructure changes are vital in reducing the barriers for those that do want to bike, though uptake so far may not have been as high as anticipated. However excellent the support services may be, if people are not ready to bike they will have little impact.

By also devoting energy to motivating people to want to bike through a strategic marketing campaign and balancing activities within a strategic overview, uptake will be increased and impact maximised.

The programme will serve to:

- Focus attention and resources on both behavioural challenges
- Provide a framework for strategic and informed decisions
- Provide a concrete identity that everyone will know about and be proud of
- Unite efforts toward bold and ambitious goals
- Reduce any dilution and reactive nature of messaging and marketing

NB the motivational challenge can also include getting students to want to drive less, primarily through communicating information about car parking restrictions, parking costs, incoming Resident Parking Scheme, traffic issues etc. These messages can be included in positive messages stressing the benefits of cycling and pointing out the costs of driving.

Programme brand and values.

Brand.

A key element of uniting efforts together and the next step of this project is to create a compelling and appealing brand identity. The brand's set of core values will be applied throughout different materials to reinforce messages, and provide consistency to variations produced to adapt them to work with different segments.

The brand messages will help to tackle people's (mis)perceptions, and to bridge the gap between how they see themselves and how they see cyclists. Also ultimately to contribute to creating a culture of cycling, and to communicate the range of types of cyclists there are so people find one they identify with, rather than only one stereotype.

Having one unified and coherent brand will also serve to bring together various and currently somewhat fragmented marketing activity, such as the Travel Challenge, Sustainability Week, etc.

Brand values.

The key values believed to be important to the brand:

- Diversity: ensure that the voices of different segments and students with different perceptions and priorities are represented to communicate the diversity and the different tribes within biking community
- Communicating experiences: use real students as the voice of the campaign, and tell their stories of real experiences of cycling to ensure messages are engaging and students relate them to their own situation

Brand messages.

The following pages detail opportunities identified from the actionable insight, the aims of messaging around each opportunity, which segments are being targeted, and potential marketing activities.

NB these recommendations are early seed ideas, and should be explored and developed further prior to implementation inline with available resource.

General advice on targeting segments.

While defining the campaign approach to targeting segments should be part of the development of the implementation strategy, and it is too early to specify at this stage, we have included some general advice here to aid this activity later.

Multi-segment messages.

One approach is to promote messages and ideas that work across multiple segments and are served to the entire student population in a less targeted way. However there is the risk with this approach of diluting the power and effectiveness of the messaging.

Segment specific channels.

An alternative approach is to identify and utilise highly focused and targeted channels to deliver messages to specific segments. For example, targeting fitness conscious segment through hyper local posters or interventions within gyms.

Embedding segmentation activity within marketing.

The segmentation model itself can be embedded within marketing and engagement activity, and used to serve specific and tailored messages to individuals.

We have used this approach in a stop smoking project where the segmentation model was turned into both a physical game and a rapid segmentation field tool. Individuals located themselves along the two axis, and then the description of their segment and specific messages and tools were served to them. This could work in a variety of formats such as an online game or as part of a face to face engagement event.

05 Messages and activities

Opportunity	Students' priority for fast transport	Students' priority for low cost transport	Use the power of social norms, and frame cycling as normal	Support those with low confidence about cycling
Messaging aims	<p>Reinforce the perception that cycling is a fast way to travel</p> <p>Tackle any perceptions about driving as a fast way to travel</p> <p>Reduce the perception that cycling involves more time in preparation and afterwards</p>	<p>Reconfigure any misperceptions about the cost of a bike</p> <p>Communicate in a way students can relate to the money they will save</p> <p>Target first years who are not using their free buss pass and second years whose free bus pass has expired</p>	<p>To portray cycling as a social norm for Bristol students</p> <p>Communicate the diversity of types of cyclists to ensure different segments feel included in the norm</p> <p>Use peer messaging to reinforce the perception of group norms</p>	<p>To encourage those with low confidence to take a small step, and try cycling out for just a day</p> <p>A light touch, low commitment required, not changing lifestyle totally</p> <p>Starting small in order to build confidence/perception of safety through positive experiences</p>
Segments	Freedom Seekers Safe Travellers	Freedom Seekers Safe Travellers Social Normals	Social Normals Safe Travellers	Safe Travellers Social Normals Freedom Seekers
Potential activities	Social media: Viral Video telling the story of a cyclist overtaking cars with a counter on screen	Experiential: Myth Busting – bust myths regarding car costs by bringing to life relative cost differences car/bus/bike, making savings tangible and visible, e.g. a pile of cash displayed at uni	Peer messaging: train existing network of paid Cycling Champs in face to face marketing and encourage them to disseminate the brand messages: cycling is normal and what your peers are doing	Experiential: Bike for a Bit - an experiential campaign, using face to face street engagement to encourage bus users or car drivers to try cycling for a day or shorter, providing those with low confidence with positive experiences of cycling. Use the council's fleet of loanable bikes
	Print: Giveaways of shower caps/ shower gel with messages communicating service improvements (i.e. extra showers)	Print/social media: Better than Bus - target students whose fee buss pass has just expired with multi-media campaign promoting cost savings of cycling	Social media: incentivise the participants of Bike for a Bit to post photos of themselves taking on the Bike for a Bit challenge on their Facebook pages using the Bike for a Bit hashtag. Those voted the funniest/best win shopping vouchers. This will help to communicate that everyone is biking, and the perception that it is a social norm.	
	Experiential: a Sleep In (flash mob or performers) at uni to communicate the extra time to lie in if cycling. Alternatively a Cycle Mob of well rested cyclist	Social media: See How to Save - promote any special offers or discounts on bikes through SU	Experiential/social media: Fair-Weather micro campaign taking advantage of good weather bringing more cyclists out. Voting on the best photo of sunny cycling or a mascot in odd places, winning Amazon vouchers. Makes it look like all are cycling if voting on Facebook and Twitter.	
	Email: Travel Times - include information (visually represented) about travel times by bike with			

05 Messages and activities

Opportunity	Reconfigure perception that drivers are achievers and cyclists aren't	Reconfigure students' perception that cycling is hard work / complicated	Reconfigure students' perception that cycling is unsafe	Students' self-perception as fitness conscious
Messaging aims	<p>To amend the perception that drivers are achievers and cyclists aren't</p> <p>Target those segments that see themselves as achievers, and bridge the perception gap with how they see cyclists</p>	<p>Tackle perceptions that cycling is hard, complicated and inconvenient</p> <p>Tackle perceptions that it requires special clothes</p> <p>Make it appear easier, less of a commitment and something you don't have to do everyday</p>	<p>Tackle perception that cycling is unsafe through framing of statistics</p> <p>Communicate the relative safety of cycling as opposed to other modes</p> <p>Promote the safe cycle routes, and initiatives such as group route rides</p>	<p>Promote cycling as a free way of getting fitter</p> <p>Promote cycling as a way of getting fitter that requires no extra activities, it's part of the day routines</p> <p>Communicate the health benefits of cycling</p>
Segments	<p>Freedom Seekers</p> <p>Safe Travellers</p>	<p>Safe Travellers</p> <p>Social Normals</p>	<p>Freedom Seekers</p> <p>Safe Travellers</p> <p>Social Normals</p>	<p>Freedom Seekers</p> <p>Safe Travellers</p>
Potential activities	<p>Print: Cycle Stars campaign portraying cyclists as achievers using celebrities who bicycle. Adapt to celebs that students will be more likely to identify with, e.g. Charlie Roper, or famous Bristolians such as Banksy. Also maybe peer achievers: making celebs out of existing cyclists</p>	<p>Experiential/print: organise a series of Flash Mobs of cyclists dressed in cool and normal clothes to communicate how others cycle without needing 'silly' clothes/lycra. Conduct high quality photoshoot to use in print campaign making cyclists look cool AND normal</p>	<p>Print/social media: Framing Statistics to communicate how safe cycling is in comparison to driving - "You have a x% higher chance of having a car accident than a bike accident"</p>	<p>Print: Free Fitness - position cycling as a free way of getting fit, juxtaposed with the cost of a gym membership. UoB particularly has a sporting culture so target Wednesday afternoons (dedicated sports afternoon) NB first years get free gym pass too!</p>
		<p>Experiential: Signposting Graffiti at key locations (e.g. beginning of hill to uni) to mark where they can get off and walk</p>	<p>Print/social media: Relative Statistics - using stats on safety and accident levels in relation to the number of cyclists to communicate that it is low risk</p>	
		<p>Social media: share How To videos to help demonstrate and communicate how easy it is to lock up your bike securely</p>	<p>Print/social media: Safe Routes campaign to promote the use of alternative rather than main roads</p>	

Key touch points.

Touch points map.

Touch points are points of contact or interaction between a brand and its audience.

To help in planning out the delivery of the brand identity through messages and activities, and to provide an overview of potential touch points and channels for universities to serve messages to students through, we have created a touch point map. This can detail various stages in the student journey, and the specific touch points between universities and students.

This document is included in the Appendix as a large file with blank space to add further touch points, messages, and to plan out the timing and touch points to implement them. This can be printed out and used to organise and synchronise marketing activities.

Time	Nov	Aug	Sept	Oct	Dec	Jan					
Journey stages	Look for a uni	Open Day	UCAS appl.	A-Level results	Firm Uni offer	Room offer	Welcome Week	Sustainability week	Feel Good Week	Accom. Fair	Feel Good Feb
Digital touch points	Digital Social Media: Facebook Twitter			Digital Accommodation webpages	Digital Welcome Portal	Digital SU website	Digital Accommodation emails	Digital E- Induction	Digital Free bike offer email	Digital Travel Challenge	
Print touch points	Print Uni prospectus	Print Department guides	Print International guide		Print Welcome Pack	Print Freshers Pack					
Planning											

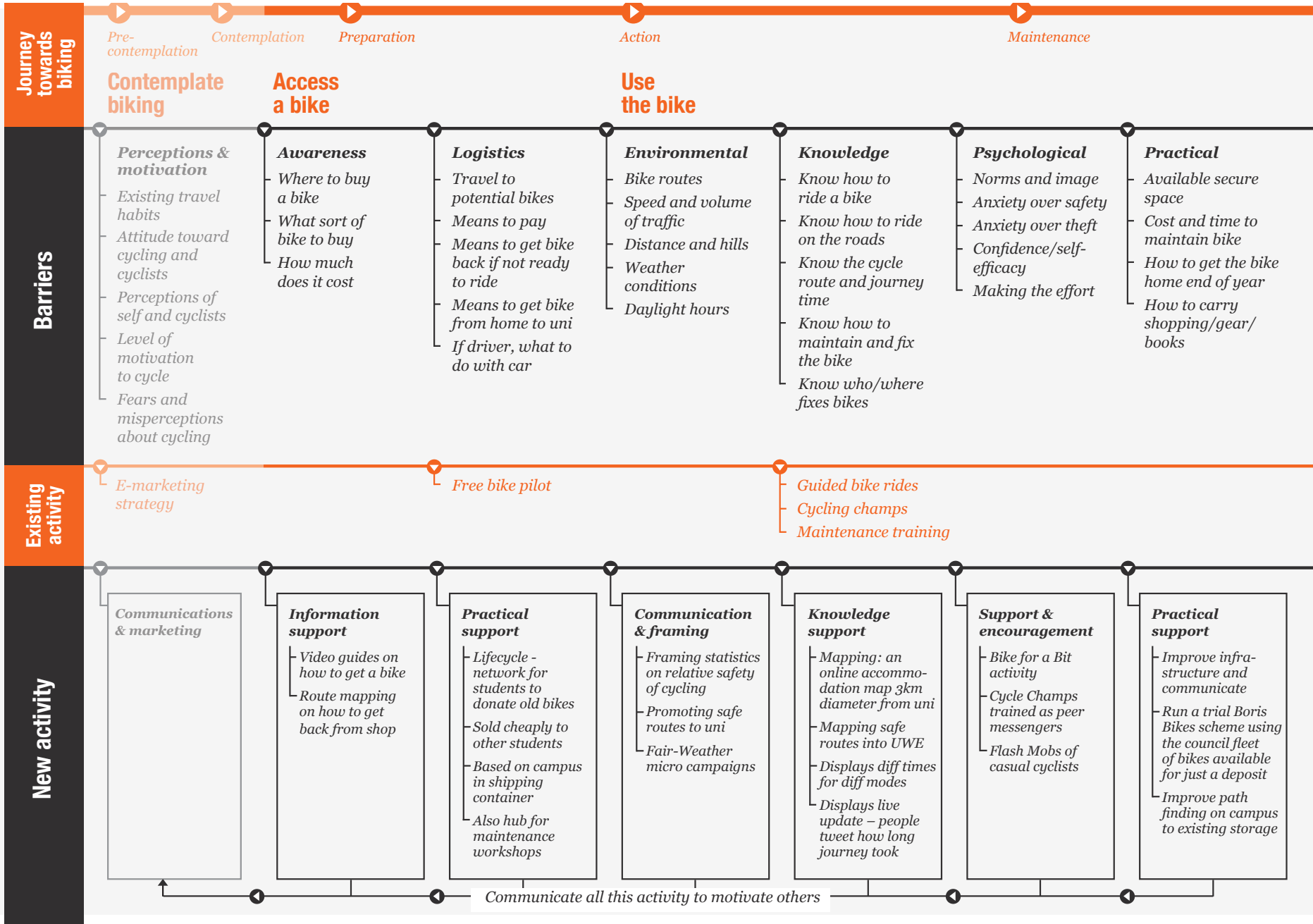
Partly completed touch point map

Infrastructure and support services to help overcome barriers

Support ideas.

The programme should also seek to continue and extend efforts to make it easier for students to bike through implementing both support services and infrastructure changes. While the primary focus of this report is on marketing required to address the first part of the behavioural challenge, we have summarised some ideas for future interventions and services that could be delivered within the programme.

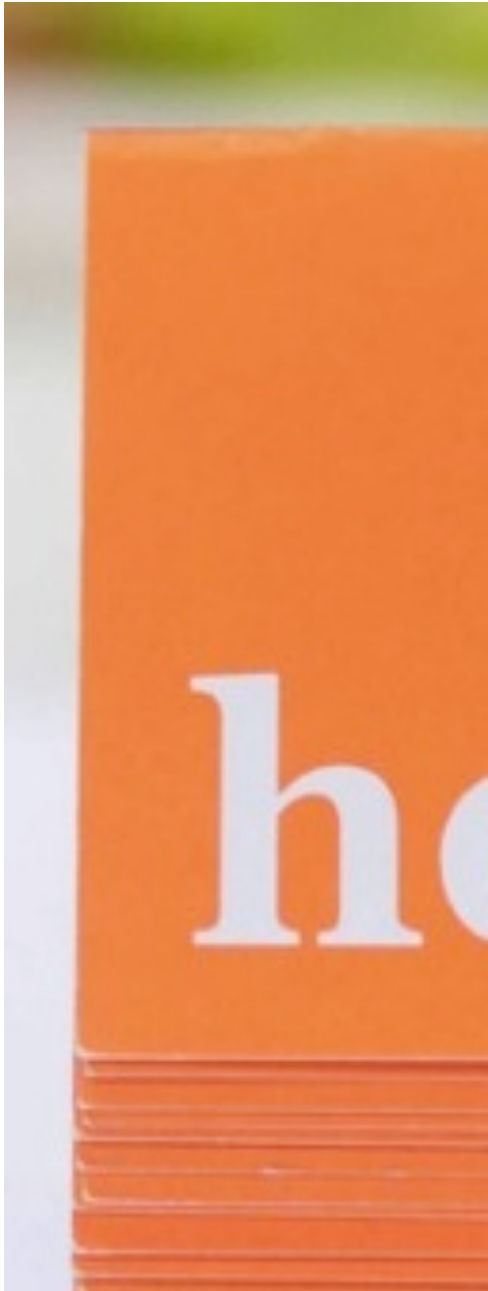
These ideas were generated by using a behavioural journey map in the co-design event. This details the various barriers that someone who is ready to take up biking may face, and maps both current and future interventions and services that would help to reduce these barriers. This is available as a larger document in the Appendix to aid future planning and idea generation.



06

Next steps

Immediate next steps



Short term

- Engage accommodation teams as key partners, and secure project buy in
- Create a social media strategy to build followers of existing channels, and partner with others with a larger reach
- Create a brand identity: host branding workshops with students (all segments)
- Develop concepts and key messages for segment
- Pre-test concepts and messages, and refine
- Develop and design materials
- Plan marketing activity using touch points map and communications strategy
- Create an evaluation framework to track impacts
- Collate baseline data and conduct additional surveys if gaps in data

Medium term

- Soft launch of brand and programme internally to build buy in and stakeholder awareness
- Hard launch of brand and programme externally with a large media splash and concerted push
- Implement marketing activities
- Measure and evaluate impact of marketing activities
- Identify future funding or resource for ongoing sustainability
- Use measurement of impact to secure ongoing resource and funding

Long term

- Implement infrastructure and service improvements and changes
- Communicate improvements through the brand and marketing strategy

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