

# STEPCHANGE TECHNIQUES – USING CONVERSATIONS TO FACILITATE PERSONAL TRAVEL PLANNING

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## 1. INTRODUCTION

Stepchange is designed to influence travel behaviour in Scotland. A series of pilot projects have been run over the past two years with the aim of developing a Scottish model approach prior to rollout across Scotland. To date stepchange pilot projects have been carried out in communities across the local authorities of Aberdeenshire, Aberdeen City, East Dunbartonshire and Renfrewshire.

Steer Davies Gleave's responsibilities ranged from appointing and training local staff; setting up project offices; establishing links with local community groups, schools and workplaces; running the day-to-day work of the project, including the interventions; liaising with council staff; relating to local residents and reporting to the Steering Group on the progress made.

This paper focuses on the techniques used to facilitate personal travel behaviour change. It illustrates the principles of stepchange by looking in more detail at the structure, purpose and implementation of the conversation as being at the core of such an individualised travel planning approach.

This paper draws on examples of conducting conversations either as a *direct* personal travel planning resource to facilitate change with individual household or as an *indirect* means of initiating actions in schools. It thereby sheds some light onto the range of situations in which the conversation manifests itself as an effective technique to address travel behaviour.

### 1.1 Making contact - communicating through different channels

The stepchange project uses several approaches to facilitate travel behaviour change. In order to maximise contact rates with residents in any designated project area, stepchange communicates the same key messages (i.e. prompting people to think about their travel, any issues and possible solutions with added health, environmental and financial benefits), albeit in a different "packaging". Conversations remain the primary technique to engage people through these different approaches.

#### *Contacting people at home*

The core of the stepchange approach to contacting residents is a conversation that is held between the residents and specially trained "Conversationalists". Contact with people is made on a household-by-

household basis, either over the phone or, where telephone numbers are not available, on their doorstep.

A schedule is drawn up for door-knocking and phoning so as to spread the set number of attempts over different times of the day and of the week and to maximise the chance of speaking to residents.

### *Schools and workplaces*

Schools and workplaces in the project areas are invited to participate in tailored **stepchange** activities. These can, for example, range from a parents evening to traffic counts or even the setting up of a Walking Bus.

For workplaces this could include developing a travel plan, conducting a sustainable transport event or providing personalised travel assistance to staff.

### *Community events*

Wherever possible, project staff attend community group meetings with the aim of informing group members about **stepchange**. Through such visits group members may become active participants in the project.

In addition, the **stepchange** team can also run community events and activities that are designed to inform members of the target communities about the project and to offer an opportunity for them to participate in the project.

### *Media*

All these approaches are supported by media coverage of the **stepchange** project, thereby helping to reinforce and diffuse key messages within the target communities.

## **1.2 Importance of a personalised approach**

When communicating with the target population the **stepchange** team endeavour to offer personalised, tailored information and support to people. In this way individual travel needs and life circumstances are much more likely to be understood, and therefore, addressed through the intervention.

Whilst targeted media attention undoubtedly helps to raise awareness about and support for the project, offering personalised travel assistance is the key feature of the **stepchange** behaviour change model.

## 2. THE CONVERSATION

Stepchange uses two key strategies to personalise the approaches made to people. The first is to engage people in a semi-structured conversation to find out more about their specific travel needs and relevant life circumstances. Specially trained project staff use conversational techniques to identify and discuss if and how people might benefit from reducing their car use and/or using travel alternatives more often. Conversations also provide the opportunity for project staff to hold detailed discussions with people about how, when and where any proposed changes can be made.

Conversational techniques are most frequently used when the stepchange team are contacting people at home – either on their door-step or the telephone. However, these techniques can also be adapted and used to identify opportunities and motivation for travel behaviour change within workplaces, schools and community groups.

The second strategy is to offer individuals information resources that are as specific and relevant to their travel needs and life circumstances as possible. Information is always provided after an initial conversation has identified what resource/s are most appropriate to an individual's needs. Section 2.2 - *Offering resources through a conversation* provides more detail about the kind of resources that are offered through stepchange.

### 2.1 Structure of a stepchange conversation

The structure of a stepchange conversation includes four stages:

- 1) Getting Started
- 2) Information Gathering
- 3) The Presentation
- 4) Closing

#### *1 Getting started: Introductions – establishing interest*

During this phase project staff introduce themselves and the project – whether on a household basis, in a school or workplace, or at a community forum. The aim of this stage of a conversation is to establish the topic, and to attempt to interest people in the project to the extent that they are willing to continue the conversation.

If necessary this stage of the conversation includes broad reference to some of the possible benefits that can arise from participating in the project. In many cases this will include an overview of the ways that travel behaviour change can help to reduce some of the everyday lifestyle and mobility problems faced by many people.

For example, project staff might mention that some participants in the stepchange project have tackled fitness problems by choosing to walk or

cycle more often, and that others have saved money by catching the bus into work once or twice a week.

If someone is clearly not interested in continuing the conversation project staff will check to see if there may be a more convenient time to talk. However, if interest is still lacking project staff will thank the person and then move on, thereby adhering to the principle that participation is voluntary.

## *2 Information gathering*

This is a crucial stage of a **stepchange** conversation because it is where project staff attempt to find out more about the specific travel needs and relevant life circumstances of the person or persons they are talking to. At this stage the key task for staff is to identify specific *opportunities* and *motivators* for change.

In order to achieve this, project staff will typically seek information around the following topics:

- The number of people living in the household;
- The number of cars used by the household;
- Commonly used modes of transport and mobility patterns;
- The relative level of importance people attach to:
  - the cost of things;
  - time;
  - health and fitness; and
  - the environment.

Gathering basic household travel and transport information helps project staff to identify what *opportunities* (if any) exist to reduce car use in favour of alternative modes. Information about the value people attach to cost, time, health and fitness and the environment provides project staff with clues about what might help to *motivate* people to change travel behaviour.

For example, learning that someone feels like they “...never have enough time with their children” should prompt project staff to consider how different transport choices might help to tackle this problem.

Information gathered at this stage will help to determine what course of action will be taken later in the process.

## *3 The presentation*

Stages 1 and 2 essentially serve to ‘qualify’ people as having the interest, need and motivation to consider changing their travel behaviour.

Stage 3 involves using the information gathered during the earlier stages to explain and demonstrate exactly how the project can be of assistance. In

particular, stage 3 involves presenting the benefits and features of a proposed travel behaviour change to people, as well as evidence that it is possible to benefit from making similar changes.

Benefits and features are framed around the information gathered during stage 2. For example, there may be an *opportunity* to change a car-based commute trip into a trip by public transport. The *motivation* to change mode might come from a feeling of "...never having enough time to relax", which can be partially addressed by reading a book whilst travelling by bus instead of driving in stressful peak-hour traffic.

Proof can entail an outside endorsement. For example, this might involve a positive review of the project in a local newspaper, a third party recommendation or a reference. However, proof can sometimes also come from the individual when they recall a positive experience of their own.

In most cases tailored information resources that will support and encourage travel behaviour change are offered during this stage. For example, a Personalised Journey Plan may be offered to someone who has agreed to try a new journey by public transport. Resources of this kind not only serve to inform people about particular travel options – they also act as an external prompt and stimulus to encourage them to actually try out the proposed travel behaviour change/s.

It is during the third stage that project staff are most likely to encounter resistance. When this occurs, it may be that people do not yet understand how participation in the project might benefit them. For example, it may be that the project worker has not identified the right opportunities or a strong enough motivator to fully engage the person in the process. In this case staff will revisit the second stage again.

On the other hand, a conversation may be unsuccessful at this point because people (continue to) express disinterest, impatience or even hostility. For example, people may express scepticism about government funded initiatives or simply be hostile to people "...selling things on the doorstep". When resistance is encountered and project staff do not feel that revisiting stage 2 is an acceptable option, the conversation is halted.

Alternatively, when people agree to try out a new travel behaviour – as they do in the majority of cases - then project staff will move on to "close" the conversation.

#### *4 Closing*

Conversations are "closed" when project staff feel a person's concerns and objections have been addressed, and when that person has agreed to the recommended course of action.

The first step in closing a conversation is to (re-)state what has been discussed and agreed upon to this point. For example, project staff might say something like:

*“So we are agreed that it would be possible for you to take the bus to work more often, and that this would give you the opportunity to relax and read a book.”*

Following on from this, project staff will generally specify what each party has agreed to do. For example:

*“From what you have said, it sounds like you can easily take this trip twice a week – on Tuesdays and Thursdays. As I said, I will send you a Personalised Journey Plan that will tell you exactly where, when and how to catch the bus.”*

The next step is for project staff to obtain a verbal commitment to take action from the person they are speaking with.

*“I’ll get the Personalised Journey Plan to you by the end of this week. Can you try it out next week?”*

The final step is to accurately record the outcomes of the conversation and to ensure the **stepchange** team follow up on all commitments made.

## **2.2 Offering resources through a conversation**

**Stepchange** resources have been specifically designed to provide detailed and (wherever possible,) personalised information to people who choose to participate in the project. Resources serve several different purposes, including:

- Helping to fill information gaps when they exist (e.g. *“I didn’t know there was a cycle path that could get me to the shops...”*).
- Helping to address misconceptions (e.g. *“I always thought I’d have to wait an hour for a bus – but you’re saying it’s only 10 minutes?”*).
- Providing motivational information (e.g. related to how using active modes of transport can improve health and fitness).

### *Specific resources*

In this section we introduce a selection of some of the resources that are made available to householders who have been engaged in the project through a conversation. However, it should be noted that in many cases general transport information is available from the local authority, and this can be used in conjunction with project-specific resources. For example, a household expressing an interest in cycling and requesting a cycling Journey

Plan could also be provided with a local cycle-route map as a matter of course. In essence, the project team aims to make the best use of all the transport and related information available in an area.

### **Personal Journey Plans**

The Personal Journey Plan brings together tailored travel information for a specified trip, including maps, travel times and data which compares making the trip by car and by the suggested mode. This resource is aimed at people who wish to make a journey they have not made before, or those who wish to make a journey they regularly undertake by car but would like to make another way. It thus encourages sustainable travel, both by making the new journey easier (as all the information is provided in one leaflet), and by highlighting some of the other advantages of making the trip in a more sustainable way.

A typical public transport Journey Plan will give details of boarding and alighting stops, service number and scheduled departure and arrival times and fare. The walk routes from the original start point to the boarding point and the equivalent for the end of the journey will be given together with an estimate of the distance and time needed to walk these. The supplementary information will show how the public transport option compares with car on cost, time (emphasising that the public transport user can apply in-vehicle time productively), environmental impacts and health facts.

A typical walk or cycle Journey Plan will set out the route on a clear plan and provide details on the distance and likely time taken to make the trip. As indicated above, the route will follow pleasant and relatively traffic-free roads and will, where possible, take advantage of safe short-cuts. The supplementary data will compare the impacts of the recommended mode with car, pointing out in particular the cost, health and environmental implications of each.

### **Travel Blending®**

Travel Blending® is a resource aimed at households that use their car a good deal, wish to understand their travel behaviour and wish to receive guidance on how they could try to rationalise their car use and shift mode for some trips. It is based on a diary which is completed for an agreed number of days (preferably four or more), ideally by every member of a household. The diary is sent back to the project team and processed, using software specifically written for the purpose, enriched with some area-specific data for feedback. Tailored feedback tips are then provided both to the household as a whole and to each individual participating in the programme. So that participants can see how these tips have affected their travel behaviour, a follow-up diary is completed one month after the initial diaries have been returned, and further feedback is sent to participants. This second set of feedback shows the household's members if and how they have changed their travel behaviour, and gives tips on how to make further changes.

Travel Blending® is an ideal resource for individuals who would have difficulty walking, cycling or using public transport but who nevertheless wish to reduce

the amount of driving they do. The reflective process of recording travel and receiving a summary of it (this being a standard aspect of Travel Blending®) has a beneficial impact on people's attitudes to travel and encourages a degree of self-awareness which frequently leads to changes above and beyond those suggested in the feedback.

### **Local Community Guide**

Community Guides are written specifically for each target area. They provide details on local shops, facilities and community groups, with the purpose of highlighting to residents of the project area how much is on offer on their doorstep. This promotes the replacement of a number of longer (car) trips with shorter journeys, which can be made on foot, bicycle, public transport.

Community Guides present the facilities under a logical series of headings, and provide opening hours, contact details, and payment methods accepted. Where businesses offer home delivery services, these are mentioned (since this can lead to a reduction in car use). Finally, each supplier is given space to state in their own words what makes their business or organisation special. This helps elevate the guide from the status of a mere directory, by imbuing it with some local character. Where suppliers see fit to offer a special discount to those using the Community Guide, this information is also incorporated. An additional feature of the Community Guide is a map summarising public transport services operating to and from the area.

## **3. TRAVEL TRACKING IN SCHOOLS**

The approach **stepchange** takes when working with schools is a tailored one. An initial meeting with the Head Teacher is set up to establish the transport-related issues affecting the school and common concerns raised often relate to school-generated traffic. It is, thus, through conversations relating to the cumulative effect of school-related travel that a decision between the Head Teacher and **stepchange** worker is reached as how to best address these concerns. Congestion at the school gates with increasing levels of children arriving at school by car negatively impact on those who do chose to walk or cycle. Measures sought by the school, thus, aim to address these issues. One such package is a classroom-based activity developed to raise awareness and prompt travel behaviour change amongst pupils.

Travel Tracking is a travel diary developed as a new resource offered by **stepchange** to primary school children aged 8-12 years. The concept is to raise awareness amongst young people about their travel patterns, not only for the school run but also for the way they travel in their spare time. To date Travel Tracking has been carried out with more than 450 children from 18 P4-P7 classes across Scotland. In order to measure the degree to which this awareness raising exercise may have contributed towards decreased levels of car trips before and after hands-up surveys were conducted with 14 of the participating classes.



### 3.1 Travel Tracking and the 5-14 National Guidelines

Completing Travel Tracking and thinking about travel patterns and options meets attainment targets for:

- **Physical Health** by helping to create and maintain healthy lifestyle options in travelling to and from school and by showing how these lifestyle choices can be carried over into the future life of the pupil;
- **English Language** by talking about experiences and opinions as well as encouraging functional and personal writing during diary weeks and evaluation sessions;
- **Mathematics** by recording travel times and estimates in hours and minutes and by comparing travel times between pupils or between diary weeks; and
- **Personal and Social Development** by identifying and evaluating societal values (e.g. car ownership, public transport, travelling alone/with others).

### 3.2 Delivering Travel Tracking in Schools

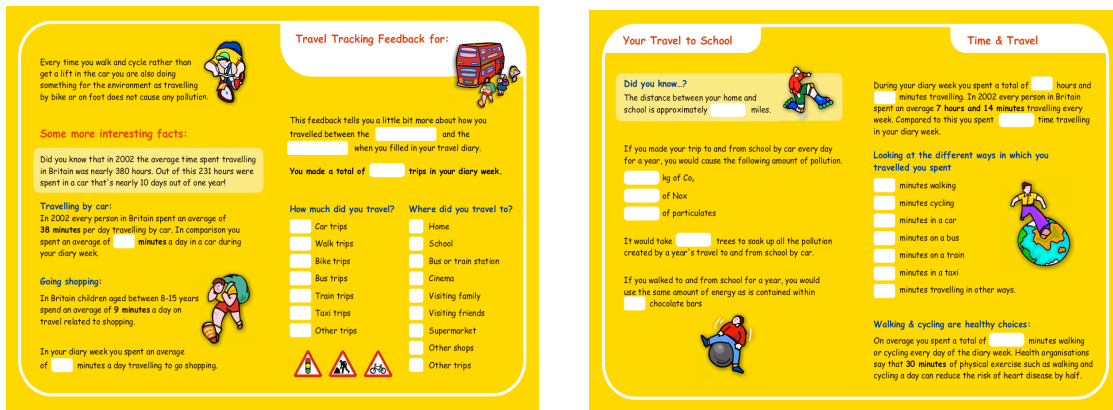
At the core of delivering Travel Tracking in schools is the dialogue between the **stepchange** worker and the pupils. An introductory 40-minute session takes place during which a simple hands-up survey is conducted to gather baseline data on the class's travel to school patterns. In this plenary session the pupils are encouraged to explore the advantages and drawbacks of travelling to school in a particular way, and to think how young people's travel patterns are often linked to those of other household members (*i.e.* "Mum drives me to school when she's on her way to work"). During this session pupils are also instructed on how to complete their personal travel diary over a 7-day period.

Once completed, schools return the diaries to the **stepchange** project team, who then process the information using a specially developed database. The output produced from this database forms the main element of the personalised feedback. This is printed as a double-sided, folded A4 sheet for each child (see Figure 3.1).

Feedback covers:

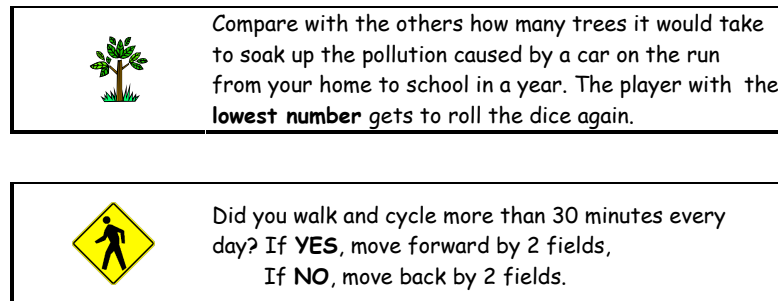
- Number of trips by destination and mode;
- Time spent travelling by mode and comparison with national trends;
- Health implications of time spent on "healthy" modes such as walking and cycling; and
- Environmental implications of journey to school by car.

Figure 3.1 Personalised feedback template



For each class a second 40-minute session then takes place to deliver the personalised feedback, discuss any unusual observations and compare personal travel with that of others by playing an interactive board game, where pupils progress at different rates, depending on their feedback, as illustrated in Figure 3.2. This discussion is also an opportunity to explore to what extent individuals would like to make a small change to the way they travel based on the feedback they received and establish what the motivations for this change are.

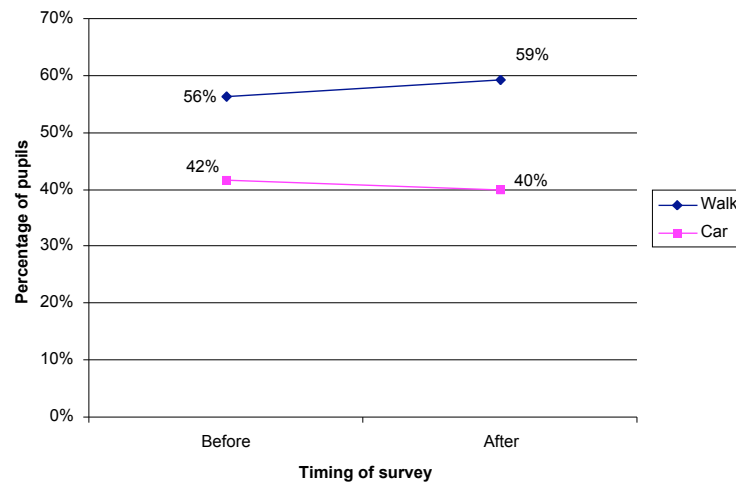
Figure 3.2 Examples from the board game's instructions



### 3.3 Quantitative Insights

The hands-up surveys allow for the analysis of the participating children's travel to school patterns. The aim is to establish whether and to what degree a modal shift may have been achieved due to the awareness raising exercise. Data represented here is from **stepchange** year 2 and was gathered from 14 participating classes (343 pupils) across 3 primary schools in East Dunbartonshire and South Lanarkshire.

**Figure 3.3 Hands-Up Survey Results**



Encouragingly, the proportion of children who walked to school rose by 3% and dropped by 2% for those travelling to school by car when comparing the before and after survey data (see Figure 3.3).

To what degree the awareness raising exercise of Travel Tracking influenced these patterns is, however, impossible to unpick as pupils' travel patterns are determined by several factors: weather, particular events at the school on that day, and parents' other commitments such as work. Children from separated/divorced parents often have two homes and this was something that became apparent during this exercise. Children noted that they travelled to school in different ways, depending on whether they were staying with the father or mother.

### 3.4 Qualitative Insights

Recognising the fact that hands-up survey results only paint part of the picture, **stepchange** evaluates the travel diary exercise using qualitative methods, again putting the conversation at the centre as an effective technique to tease out the constructive thought processes relating to personal travel patterns and a desire to make small changes.

Reasons for wanting to make small travel changes can be plentiful. Following are some comments from P6 children at Blacklaw Primary, East Kilbride:

*"I didn't realise a car would cause that much pollution on the way from my home to school. I want to use the car less because my friend has asthma and the pollution makes it worse."*

*"I want to do more walking and cycling because it makes you fit."*

When asked how these small changes might pan out in reality, some children are able to give quite specific suggestions:

*“I’ll ask my mum to drop me off at the Sainsbury car-park. Then I can walk from there to school. This means I’ll walk more every day and also there will be fewer cars outside the school.”*

*“I’ll walk or cycle to my friends, rather than get my mum to drive me there.”*

### 3.5 Travel Tracking and the Future

The Travel Tracking package has the potential to be expanded to include a second round of diaries, either by using the same diaries and feedback format, or by developing a second diary and accompanying database with would focus on the comparison of travel patterns between the two diary weeks. The general idea, much like Travel Blending®, lies in further encouraging any small changes towards more sustainable travel.

## 4. SUMMARY

This paper has provided an overview of techniques used in **stepchange** projects to encourage and facilitate travel behaviour change. In particular, it has described conversation techniques and tools that are commonly used in these projects and has looked in more detail at how **stepchange** techniques can be applied in a school context.

There is an increasing acceptance in the UK that the use of travel behaviour change interventions like **stepchange** can make a positive contribution to social, economic, political and environmental goals. In England, a number of towns have secured funding for being sustainable demonstration towns. These towns will, as part of their work, carry out personalised travel planning with local residents that is similar to the **stepchange** model.

Whilst travel demand management - for example, congestion charging and new roads - are still used to respond to increasing private motorised transport, personalised approaches such as **stepchange** have now also gained acceptance – suggesting that “soft” measures are firmly establishing themselves. At their core is the technique of conducting one-to-one conversations rooted in the art of “tuning in” to what individuals want to change about their travel situation and offering support to achieve this change.