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Interreg Europe

We care for each other, we care for our space,
we become part of mobility planning

HANDBOOK FOR SUCCESS TIPS ON MARKETING TECHNIQUES

ADOPT

EMPOWER

INVOLVE

COLLABORATE

INFLUENCE

CONSULT

PARTICIPATE

CO-PLANNING

COMMUNICATE

INTERACT

ENGAGE

PROMOTE

INFORM

INCREASE AWARENESS

MARKETING TECHNIQUES

SEPTEMBER, 2020

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Introduction

Users' engagement in mobility planning is often a big challenge for authorities since it requires experience in marketing techniques and deep knowledge of the social characteristics of local communities.
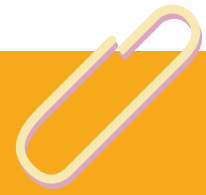
A successful engagement process is anticipated to increase the level of acceptance of the proposed plans as well as to achieve behavioural change of citizens and stakeholders towards adopting sustainable mobility habits. Moreover, it is essential to narrow the gap between local/regional governments and the civil society by deploying engagement tactics tailored to the local context in order to build and establish a trustful and long-lasting relationship between them.

This publication has been developed as part of the e-smartec project. A 3-year project funded under the Interreg Europe Project focusing on Low Carbon Economy. The overall goal is to reinforce policies and programmes by enhancing each step of mobility planning with the deployment of targeted marketing techniques for linking bottom-up and top-down decision making.

Based on the documented experience on engagement practices, as described in the "State-of-the art on marketing techniques for citizens' and stakeholders' engagement in e-smartec Regions" report[1] and in the "International state-of-the art on marketing techniques for engagement[2], a set of engagement tools and methods is described here in detail, providing success tips, "how-to-do" guidelines and examples of best practises for not only raising awareness but also for facilitating the dialogue between multiple stakeholders as well as for identifying bottlenecks and revealing opportunities during the SUMP development process.

This handbook aims to become a helpful guide for urban authorities for achieving successful citizen engagement during every stage of the SUMP development process.

Community Engagement
during a time of an unexpected crisis.*

Lessons learnt from the Covid-19 outbreak

As public participation is the cornerstone for delivering effective policies and plans, it is crucial to keep the engagement process active even in times of an unforeseen crisis. Therefore, although safety measures, such as social distancing, have been applied due to the covid-19 outbreak, might indicate that engagement process is impossible, the recent experience has shown optimistic results. Virtual public engagement can offer an innovative opportunity for engagement without losing the quality of public discourse and benefits of collaboration. For a successful virtual engagement process, the following 4 guidelines are recommended:

▶ **Select online tools according to your audience, the required level of participation and the available budget**

Engagement processes should use a suite of virtual tools tailored to the engagement strategy scope and available resources. Ensuring the selection of the right tool at the right time will lead to the best results and a better overall engagement process.

Tips for tool selection according to the engagement scope:

- Social media can engage a broad audience, video conference focus groups allow for in-depth discussion that does more than just inform the stakeholders, and online surveys can be a quick way to harvest insights from the audience.

- For engaging a broad audience, it is recommended to coordinate a webinar with live polling features while for a smaller group choose to coordinate a number of online dialogues with digital collaboration tools.

- Make sure to provision adequate budget to include labor required to create online materials, staff time to host an event or evaluate input, software or subscription expenses, technical knowledge and abilities needed to create/host the platform.

▶ **Invest time and resources in the website**

Provide a comprehensive project website with as many interactive features as possible. Keep in mind that it is not just about sharing information but it is also about offering interactive opportunities for users. It is recommended to utilize advanced digital tools such as 3D renderings, videos or even virtual reality if possible, in order to allow the audience to get a better grasp of what the project will look like so they can provide accurate insight and feedback.

▶ **Prioritize Social Media**

The value of social media goes beyond simply sharing an attractive picture. For example, use Instagram polls to gather input on features for street enhancements, do a live video on Facebook featuring the project coordinator or a key stakeholder answering questions about the mobility plan, host a Twitter meet up where participants can respond in real time to questions, or use Snapchat to target key demographics or areas through geocoding.

▶ **Be aware of digital divide**

Keep in mind that an online engagement strategy bears the risk of leaving important target groups behind due to limited technology access, differences in communication preferences and abilities, and different levels of civil trust. It is crucial to address the digital divide to ensure social inclusiveness by going back to the basics of public engagement. Phone surveys, mailings and print advertisements should be key activities of the engagement strategy to ensure that all have the opportunity to engage and share feedback. Moreover, reaching out to community leaders to activate grassroots techniques helps to ensure engagement opportunities are directed appropriately to target audiences.

*source: worldlandscapearchitect.com, "Community Engagement During A Time of Social Distancing", article by Damian Holmes

1

Integrating a participatory process in the development of a Sustainable Urban Mobility Plan (SUMP)

1.1 Definitions

1.1.1 What is a Sustainable Urban Mobility Plan (SUMP)?

A Sustainable Urban Mobility Plan (SUMP) is a strategic plan designed to satisfy the mobility needs of people and businesses in cities and their surroundings for a better quality of life. It builds on existing planning practices while taking into consideration a range of integration, participation, and evaluation principles.[3]

SUMP Key Principles[3] :

- Plan for sustainable mobility in the "functional urban area"
- Cooperate across institutional boundaries
- Involve citizens and stakeholders
- Assess current and future performance
- Define a long-term vision and a clear implementation plan
- Develop all transport modes in an integrated manner
- Arrange for monitoring and evaluation
- Assure quality

The SUMP as planning concept is strongly promoted by the European Commission. In 2013 the European Commission released the Urban Mobility Package[4] to reinforce its support for urban transport. Since then a structured process[5] has emerged based on a broad exchange of insights and knowledge between planning experts, stakeholders and citizens across the European Union.

Consequently, a SUMP tackles transport related problems in urban areas more efficiently, as it is a result of a structured multi-step circular process that includes status analysis, vision building, objective and target setting, policy and measure selection, active communication, monitoring and evaluation.

1.1.2 What is a "participatory approach" in planning?

A participatory approach entails the active involvement of the public in urban planning and decision-making processes, whereby the relevant 'public' depends upon the topic being addressed. "The public" can be typical citizens, typical stakeholders, policy or decision makers, experts and even members of municipalities and private industries, whose participation may take place during different stages of the planning process.

A participatory approach can be applied in different levels according to the purpose of the project and the target groups. Concepts such as 'co-creation' and 'co-production' are methods of a participatory approach, which leads to a trustful and sustainable collaboration between authorities, stakeholders, and citizens by fostering a two-way interaction between participants.

Users' experiential knowledge plays a key role in implementing successful projects. The participatory approaches create opportunities where the public can collaborate with the stakeholders and highlight all available resources. However, in order to unlock and leverage the multiple benefits of a participatory approach, it is crucial to establish a common understanding of the project and its vision from the beginning of the process.

Participation is essential for sustainable and successful planning, but it is often challenging to implement an effective engagement strategy. All stakeholders who are involved in mobility planning need to have a clear action plan with direct goals which in return, will indicate the appropriate engagement tools and methods to coordinate an effective process.

1.1.3 The SUMP cycle

Developing a Sustainable Urban Mobility Plan (SUMP) is a demanding and interdisciplinary task. The process of developing and implementing a SUMP is divided into 4 phases including 12 main steps[2] which form the SUMP cycle as illustrated below. An integrated participatory approach is recommended to be applied during each of the 4 SUMP phases for ensuring the effectiveness and acceptance of the final SUMP.

The SUMP cycle (SUMP 2.0) Source: eltis

PHASE 1: Preparation & Analysis	PHASE 2: Strategy development	PHASE 3: Measure planning	PHASE 4: Implementation and monitoring
Step 1: Set up working structures	Step 4: Build and jointly assess scenarios	Step 7: Select measure packages with stakeholders	Step 10: Manage implementation
Step 2: Determine the planning framework	Step 5: Develop vision and strategy with stakeholders	Step 8: Agree on actions and responsibilities	Step 11: Monitor, adapt and communicate
Step 3: Analyse mobility situation	Step 6: Set targets and indicators	Step 9: Prepare for adoption and financing	Step 12: Review and learn lessons

1.2 The participatory process during SUMP development

1.2.1 Participatory Planning approach during the SUMP cycle

Participatory planning enables citizens and stakeholders to take ownership of the Sustainable Urban Mobility Plan and the relevant policies. It is likely to increase the public acceptance and support of the final plans while also it facilitates the plan implementation.[6]

The scope of the participatory planning approach in every SUMP phase can be divided into the following 2 main categories.

Increasing Awareness
This scope refers to all actions and techniques which aim to inform, train or educate the audience, with the ultimate goal to change behaviour towards sustainable modes of transport.

Engaging in co-planning
This scope refers to all techniques & methods that aim to foster collaboration and active involvement of the audience in the planning process.

In both scope categories, the following **4 key elements** should be considered when developing a public engagement & participatory planning strategy.

1   PARTICIPANTS   - Who is affected, interested, or can contribute?

Main groups to consider:

Citizens

Placing citizens at the center of policy-makers' considerations, not just as recipients, but also as agents. The aim is to invite and motivate individuals to become interested, collaborate and eventually contribute to policy development and co-design services that respond to their needs, thus becoming "carriers of the message" creating a domino effect that in return can affect more citizens.

Type of citizens

•   Citizens as individuals

All citizens have different abilities and talents. In order to foster meaningful participation, it is crucial to identify the specific target group of citizens that corresponds each time to the purpose of the intervention. Furthermore, when addressing mobility issues, it is important to include people of different backgrounds and abilities, adapting the planning process accordingly to accommodate their needs.

•   Associations of citizens

Associations like neighbourhood committees or citizens unions, can play important role in developing SUMP plans. Citizens feel empowered as a group thus increasing their level of engagement and participation to the process.

Stakeholders

Stakeholders are internal or external groups that have direct or indirect interest in the project. An effective engagement process helps in fostering trustful relationships between authorities and stakeholders, translating stakeholder needs into project objectives and therefore, setting the baseline for an inclusive strategy development.

Type of stakeholders

•   Typical stakeholders (NGOs, private sector, interest groups)
•   Experts in mobility planning/ marketing/ urban design
•   Policy makers & Decision Makers

All of the aforementioned types of stakeholders can be involved to a different extend depending on their expertise, objectives and responsibilities. It is important to have internal alignment and collaboration between the different parties involved, otherwise it is unlikely to build an effective strategy or implement changes.
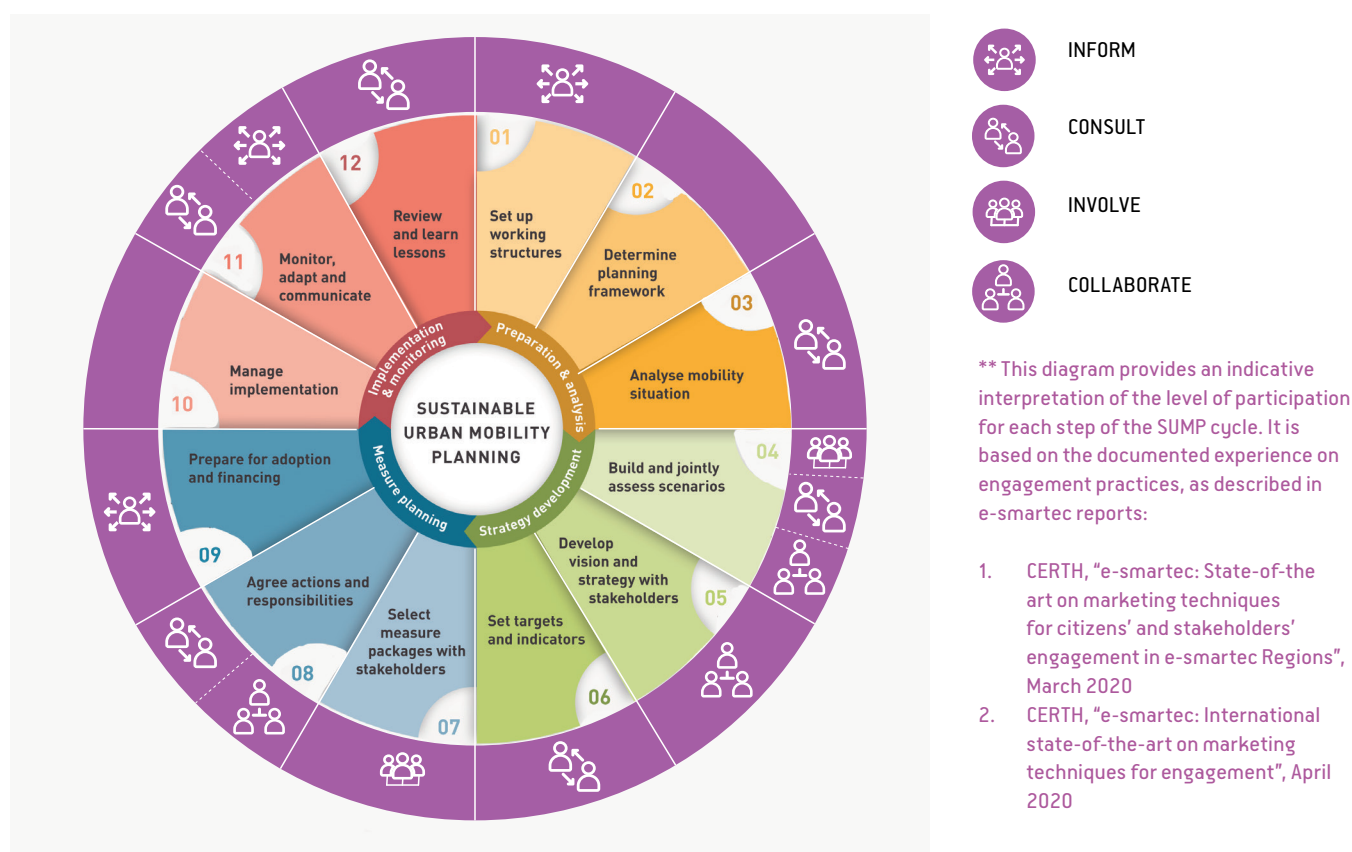
2   LEVEL OF PARTICIPATION - Does everyone participate during the process and to what extend?

Stakeholders or citizens can participate in different levels, from "informing" to "collaborate" according to the spectrum of public participation developed by the International Association of Public Participation[7]. The level of participation of each user may differ according to the scope of the participatory process and the different phases of a SUMP cycle.

The table below explains the four levels of participation that organizations can aim for their stakeholders and communities. They are represented with an order from left to right (further to the right the greater the community's influence to decision making). In each level a different type of interaction is required, and different promises are made to the community.

	INFORM	CONSULT	INVOLVE	COLLABORATE
GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.
PROMISE	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible

*The spectrum of public participation presented here has not included the referenced upper level of "empowerment", thus reflecting the authors' difficulty in identifying cases where citizens had the actual control of decision making in mobility design and planning.

INFORM

CONSULT

INVOLVE

COLLABORATE

** This diagram provides an indicative interpretation of the level of participation for each step of the SUMP cycle. It is based on the documented experience on engagement practices, as described in e-smartec reports:

1.   CERTH, "e-smartec: State-of-the art on marketing techniques for citizens' and stakeholders' engagement in e-smartec Regions", March 2020

2.   CERTH, "e-smartec: International state-of-the-art on marketing techniques for engagement", April 2020

3   TIMEFRAME   - When and how shall the participatory process be implemented?

                                  - In which stage of the SUMP cycle are we?

All engagement techniques and methods must be implemented at the appropriate time during the 4 stages of the SUMP cycle, in order to have valuable results.

The appropriate timeframe is determined by:

- the process
- the local context of each engagement action
- the duration and preparation time of each selected method
- the "community outreach" target value

4   COST   - What is the available budget?

The marketing techniques and engagement methods can vary greatly in terms of cost. Some are more complex than others, thus requiring a higher budget. The selection of the appropriate engagement tools and methods depends on the available budget.

The budget includes different cost categories such as:
- Administrative costs
- Workshop/ event materials
- Provisions (Catering)
- Venue rental
- Documentation (photo, video documentation)
- Coordination/ Facilitation services
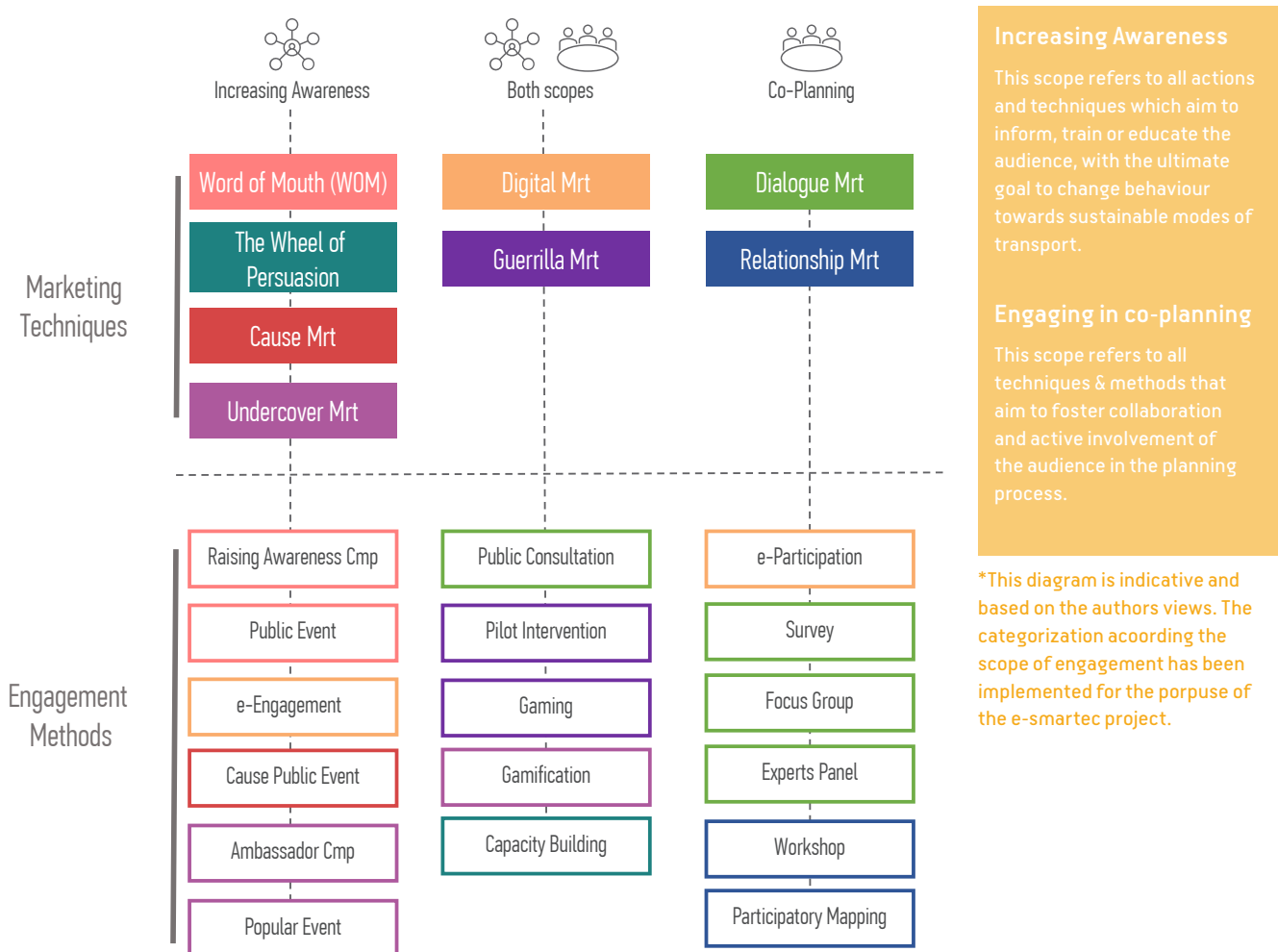- Communication Services / Media coverage
- other

2

Marketing techniques for citizens' and stakeholders' engagement

2.1 Marketing techniques used for the participatory processes

A selection of effective techniques that can be applied for the implementation of a participatory planning process is presented in this chapter. The inspiration of these techniques originated from the Marketing industry. The definition of each one of them has been adjusted to accommodate the needs of mobility planning.

The process of developing and implementing a SUMP is complex and it requires specific and strategic engagement actions. The following diagram illustrates the categorization according to the preferable scope of the engagement process, either "Increasing Awareness" or "Engaging in co-planning". Each phase of the SUMP cycle process has different objectives, thus different techniques and methods are required.

Increasing Awareness

Increasing Awareness | Both scopes | Co-Planning

Marketing Techniques

Word of Mouth (WOM)	Digital Mrt	Dialogue Mrt
The Wheel of Persuasion	Guerrilla Mrt	Relationship Mrt
Cause Mrt		
Undercover Mrt		

Engagement Methods

Raising Awareness Cmp	Public Consultation	e-Participation
Public Event	Pilot Intervention	Survey
e-Engagement	Gaming	Focus Group
Cause Public Event	Gamification	Experts Panel
Ambassador Cmp	Capacity Building	Workshop
Popular Event		Participatory Mapping

Increasing Awareness

This scope refers to all actions and techniques which aim to inform, train or educate the audience, with the ultimate goal to change behaviour towards sustainable modes of transport.

Engaging in co-planning

This scope refers to all techniques & methods that aim to foster collaboration and active involvement of the audience in the planning process.

*This diagram is indicative and based on the authors views. The categorization acoording the scope of engagement has been implemented for the porpuse of the e-smartec project.

Marketing Techniques & Engagement methods diagram*.
The engagement methods are the tools for delivering the selected marketing techniques.

2.1.1 Word of Mouth (WOM)

Word of mouth (WOM) communication is a process of storytelling and knowledge spread. It is a commonly used process in consumer decision-making literature and proven as the most important, trustful and credible source of information.[8]

Scope:

- to rapidly spread information about an initiative
- to attract public interest by using vivid artworks
- to cover a wide range of target group audience through several mediums
- to engage broad by using casual wording

It is a direct technique, with the objective to generate a "buzz" over specific issues in order to increase awareness and enable participation in future initiatives.

Types:

Organic WOM

A technique that occurs naturally when a person wants to tell others about a positive or negative experience with a product or a company

Amplified WOM

A technique that occurs when a marketer launches a campaign or in some other way encourages others to speak about a product or a company.[9]

2.1.2 Digital Marketing

Digital marketing is the component of marketing that utilizes online based digital technologies such as digital apps, platforms and websites, used in desktop and mobile interface, to promote services and products. The same policies can be applied to participatory projects for citizens' engagement. It is a non - linear marketing approach, where exchanges between provider and recipients are free flowing and the information is disseminated through numerous channels, such as the blogosphere, YouTube, Facebook, Instagram, Twitter and a variety of other platforms. Online communities and social media platforms allow individuals to easily share content and publish their opinions, experiences, thoughts and feelings about many topics and products.[10]

Types of Digital Marketing

The following categorization is based on the primary means of communication which are used for each campaign:

Social Media

A technique that primarily uses blogs or communicative platforms such as Twitter, Facebook, Instagram, YouTube, Snapchat.

Internet Marketing

A technique that primarily uses mobile and desktop media with platforms or Web based apps.

Word of mouth marketing was first established in the early 1970s.[11] The earlier techniques were based on the passing of information from person to person using oral communication. Through the years following the constant revolution of the new media age the technique developed form face to face communication to online communication, focusing on digital interaction and sharing of information among peers through digital mediums, in the form of social media and viral communication. The effectiveness of these techniques increases in accordance with the use rate and the level of interaction.

Recommended WOM process for a SUMP:

Create simple and effective key messages using the SUMP's measurable elements (scope, objective, strengths, weaknesses and target audience)

Develop a Brand Map featuring qualitative data that can be used to position products and services. This map will identify connections and barriers to modal shift mode while framing the key message appropriately.

This component is useful when planning a branding approach for transport modes or measures. Begin by determining what factors are pertinent to you (available travel modes, target audiences, barriers, enablers), then map their relevance and importance.

Establishment of strong communication strategy with the use of "proof points" such as facts and figures. The engagement strategy should by supported by predefined key indicators. Measurable data as well as best practices can act as "proof points" for establishing the strategy's communication message.

 Proof points should be kept simple and delivered in terms that the public will understand. This adds credibility to the SUMP, for example proof points could be:
- Statistical data (e.g. population growth rates, transportation mode swifts, user's satisfaction rates)
- Gained experience (e.g. successful case studies and good practises, expert reports)

Building the SUMP's brand image. Use of inspirational elements to appeal to the target audience and create emotional value.

2.1.3 Dialogue Marketing

Dialogue marketing includes all activities in which media is used with the intention of establishing an interactive relationship with individuals. The aim is to initiate a personalized, measurable response from the recipient.[12]

Dialogue techniques are utilized to focus on particular issues or concerns that require further input from the community. The use of personalized websites, social media, mobile apps and blog platforms establishes multiple interactive communication multi-channels with individuals who are already eager to engagement and, thus, it creates opportunities for them to connect and relate with the project. It is a four-stage process designed to help project actors develop long-lasting and mutually beneficial relationships with citizens.

DIALOGUE MARKETING PROCESS

STEP 1 — Identify

Identification of the project in order to have clear image of the involved aspects by:

- Describing the purpose, scope, objectives, strengths & weaknesses
- Clarifying the target audience

STEP 2 — Strategize

With a clear understanding of the project and the target audience, providers are able to develop clear messages and determine effective methods of engagement.

STEP 3 — Engage

Create communication channels by utilizing all available technological means in order to reach the target audience such as: websites, social media mentions, blogs, interactive apps. The goal is to invite them to connect, strengthen existing relationships and foster new ones.

STEP 4 — Measure

Gather data such as communications preferences, demographics, technical characteristics and other details in order to evaluate the interaction between actors and target audience.

Scope:

- to understand and positively influence interactive relationships with individuals and their attitudes towards topics and issues
- to pursue simple and effective communication goals
- to create safe spaces that establish openness to sharing ideas and welcoming difference of opinion

2.1.4 Relationship Marketing

Relationship marketing is a form of marketing that emphasizes in target audience retention and satisfaction rather than transactions.[13]

Relationship marketing focuses in an already cultivated target group with the intention of gaining loyalty to its purposes. Through its methods aims to create a sense of ownership to the users thus increasing the level of engagement. In many occasions, it involves award incentive actions, such as gift coupons or designated point systems.

This technique it requires many different actions and media tools such as:

- public relations strategy
- social media platforms
- application development apps

Scope:

- to build long lasting relationships with specific target groups
- to involve many interaction levels, where both the provider and recipient have an interest in a more satisfying exchange

It involves a variety of overlapping strategies which address 3 main objectives[14]:
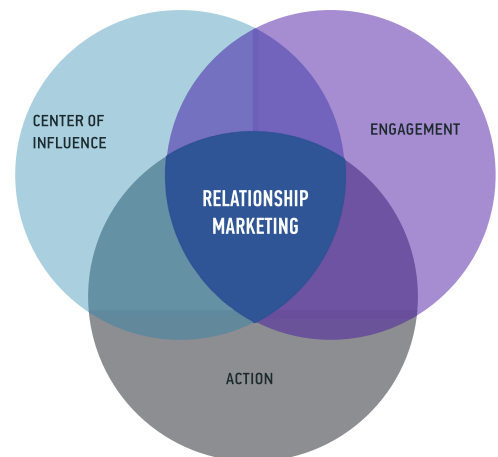
AUDIENCE ENGAGEMENT
Targeting specific audience using social media in order to create connections and conversations.

CENTER OF INFLUENCE
Forming productive partnerships with key actors thus creating centers of influence. This centers of influence bring value and credibility in the form of proof points and best-case reports, which will generate referrals that will turn into opportunities of actions.

ACTION
Using targeted methods to stimulate individuals and inspire them to cooperate and co-design.

A graphic illustation of Relationship Marketing's main objectives and the ovelapping intergations they foster. It is based in customer centric aproaches.[15]

It is a **4-stage engagement process** which can be described as a continuous loop. It can be repeated numerous times in order to establish strong bonds between provider and receiver.

1. ASK
Ask your target audience for feedback.

2. CATEGORIZE
Categorize the feedback into different segments that are meaningful to your project.

3. ACT
Act on the feedback by sharing it with others involved in the project. Strategize action plan and implement changes.
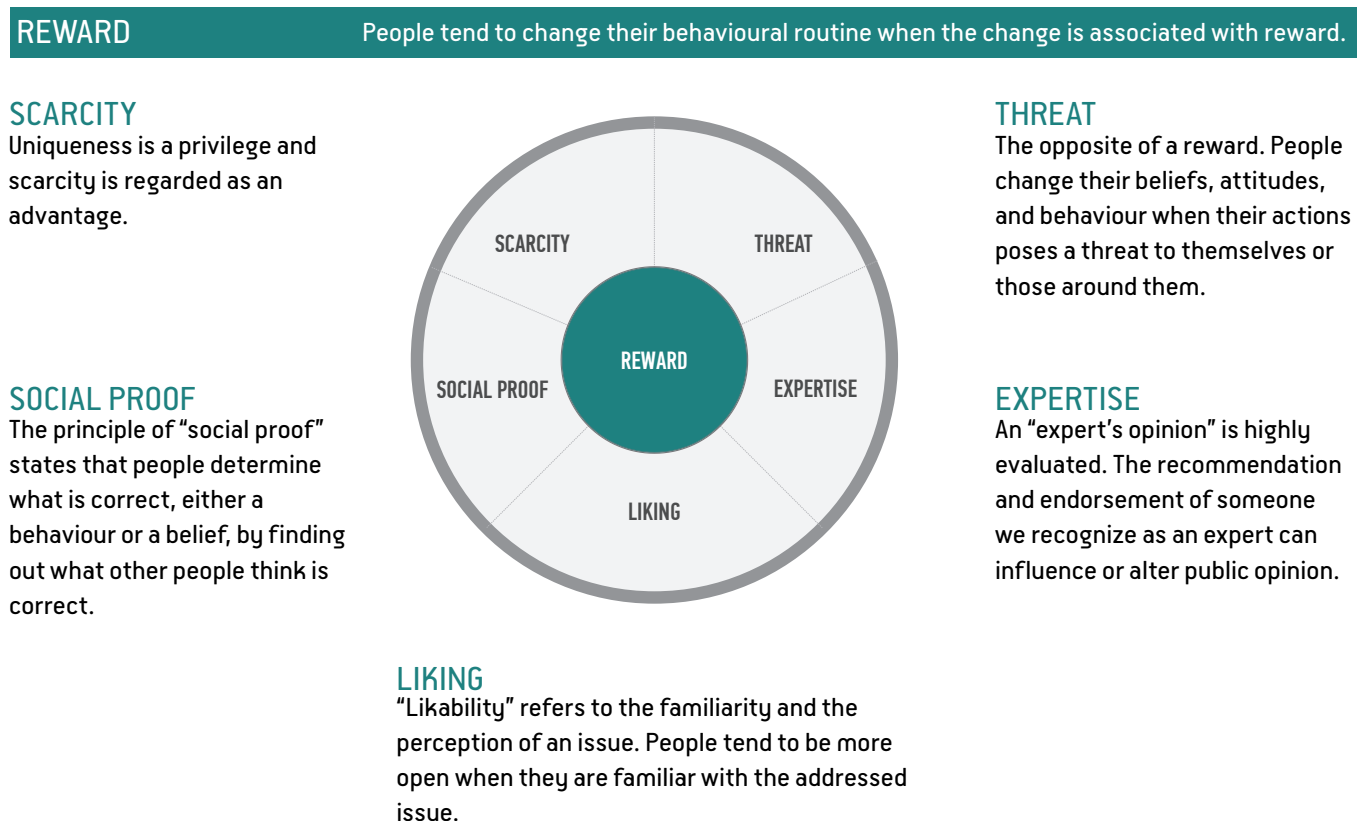

4. FOLLOW-UP
Follow-up with the users that gave you the feedback on your project, so they can acknowledge that their contribution is appreciated.

The diagram is based on the Customer Feedback Loop method[16] commonly used in Relationship marketing.

2.1.5 The Wheel of Persuasion

The term "Wheel of Persuasion" was coined by Bart Schutz[17] to describe the technique where scientific insights on the psychology of conversion (insights from behavioural economics, consumer psychology, neuro-marketing, sociology) are used for persuading the targeted audience. It is a form of marketing technique that evolves around the art of human persuasion, following 6 basic principles - based on Robert Cialdini's[18] six principals of persuasion.

THE BRAND WHEEL OF PERSUASION

REWARD   People tend to change their behavioural routine when the change is associated with reward.

SCARCITY
Uniqueness is a privilege and scarcity is regarded as an advantage.

SOCIAL PROOF
The principle of "social proof" states that people determine what is correct, either a behaviour or a belief, by finding out what other people think is correct.

THREAT
The opposite of a reward. People change their beliefs, attitudes, and behaviour when their actions poses a threat to themselves or those around them.

EXPERTISE
An "expert's opinion" is highly evaluated. The recommendation and endorsement of someone we recognize as an expert can influence or alter public opinion.

LIKING
"Likability" refers to the familiarity and the perception of an issue. People tend to be more open when they are familiar with the addressed issue.

The Brand Wheel of Persuasion is based on the report "Point of View" by Ulli Appelbaum, Director of Brand Strategy.

Scope:

• to alter the behavioural patterns by changing the common perspective on the explored issues

The wheel of persuasion is a strategic process that aims at behavioural change by targeting specific audience groups. The interventions include coordinated sets of activities that are designed to change specified behaviour patterns.

Suggested activities include:
• Trainings/ Seminars / courses/ class sessions
• Workshops
• Educational materials (printed or digital manuals, videos, etc.)

2.1.6 Guerrilla Marketing

Guerrilla Marketing is a promotion strategy which uses surprise and unconventional interactions in order to promote a concept[19]. The term was coined by Jay Conrad Levinson in 1984. Guerrilla Marketing uses multiple practices in order to establish direct contact with targeted audience[20]. It moves away from conventional promotion due to its authenticity. The used methods usually achieve high impact and notoriety, generating innovation and creativity.

According to its founder the main features[21] of guerrilla marketing are:

- Relatively low cost— it uses limited financial resources compared to the generation of high impact results.
- Time and imagination— creative methods are implemented in temporary interventions.
- Relationships—the success of this techniques is based on its ability to generate new relationships and links with the public.
- Specific focus— it focuses on specific topics.
- Combination of existing technologies— it's a strategy that combines different methodologies, exploiting existing technologies in an unconventional way, with the aim of enhancing their product.

Scope:

- to link emotional responses and provoke recipients to relate to issues differently than there are accustomed to
- to use 'out of the box'[22] tactics to promote an idea / an initiative

2.1.7 Undercover Marketing

Undercover marketing is a technique that uses sublime messaging to promote a concept.[23] The audience is exposed favorably to a topic or issue without being specifically notified about the promotion strategy. It bears many similarities with the Word of Mouth technique (see 2.1.2) as its objective is to create a "buzz" over specific issues. The key element that differentiates this technique is the use of seemingly not relevant engaging methods.

Scope:

- to use "hidden messages" in order to gain receipients attention

The message can be spread:[24]

Physically

Invite public figures to act as a "brand pusher" and promote the project/ concept in various ways.

Verbally

The message is broadcasted in on-air and off-air conversations. Similar to the Organic WOM technique (see 2.1.2).

Virtually / Virally

Communicate the project/concept through internet chatrooms, newsgroups and web logs.

Using gaming environments

Develop game apps and platforms in mobile or desktop interfaces.

2.1.8 Cause Marketing

Cause marketing is a marketing technique that focuses on social or charity causes while promoting social responsibility. It aims to raise awareness for the global issues and engage the public to take action towards tackling them. It is designed to attract attention around the topic, while linking relevant activities or ideas that can attribute to the explored topic. As a technique, it is commonly used by non-profit organisations. According to Alan Andreasen (1995), Cause Marketing aims at influencing voluntary behavior to benefit individuals or society, rather than marketing the organization itself.[25]

Cause marketing can provide the opportunity to engage the public, not only rationally but also emotionally through the creation of an ethic consciousness by stimulating individual behavioural change.

Scope:
- toengage the public rationally and emotionally
- to promote social responsibility

It can take many forms and can be implemented through:

Offline media

open events and demonstrations, volunteerism

Online media

social media cause communications, digital cause campaigns

2.2 Engagement Methods

Each Marketing Technique can be implemented by using a set of Engagement Methods. The combination of those methods forms the backbone of the engagement process. For the purpose of SUMP planning, it is highly recommended to combine more than one Marketing Techniques and choose engagement Methods accordingly.

Engagement Methods clustered by Marketing Techiniques

All engagement methods are clustered to Marketing techniques based on their main scope of each techniques along with the key characteristics of each method. It represents a recommended categorisation with the objective of assisting urban authorities while implementing a SUMP.

In the next sub-chapters, a list of "Success Tips" in terms of the following 6 categories are analyzed for every engagement method.

Word of Mouth

Cause Marketing

- Raising Awareness Campaign
- Public Event

Digital Marketing

- e-Participation
- e-Engagement

Dialogue Marketing

- Survey
- Public Consultation
- Focus Group
- Experts Panel

Relationship Marketing

- Workshop
- Participatory Mapping

The Wheel of persuasion

- Capacity Building

Guerrilla Marketing

- Pilot Intervention
- Gaming

Undercover Marketing

- Gamification
- Ambassador Campaign
- Popular Event

Success Tips

- SCOPE
- TYPE OF PARTICIPANTS
- DURATION*
- COST**
- METHOD COMPLEMENTARITY
- PHASE OF SUMP CYCLE

*This section represents an indicative duration estimation based on the findings of "Handbook for Participation Strategies for Mobility Issues in Neighbourhoods" published by SUNRISE Consortium in collaboration with Urbanista.

**This section represents an indicative cost estimation based on the findings of "PARTICIPATORY METHODS TOOLKIT, A practitioner's manual" published by the King Baudouin Foundation and the Flemish Institute for Science and Technology Assessment (viWTA) in collaboration with the United Nations University – Comparative Regional Integration Studies (UNU/CRIS).

2.2.1 Raising Awareness Campaign

Raising Awareness Campaign is a promotional campaign which uses several tools in order to reach as many individuals as possible. It is a commonly used method that plays key role in informing the wider public for the purposes and the multiple benefits of the project.[26]

Key characteristics:
- Clear objectives and success target goals.
- Focus on specific issues and the relevant audience target groups.
- Interesting content presented in different formats

Types:[27]

▶ **Offline Campaign**

A campaign that can be implemented exclusively offline. It refers to promotion and information in person. It can take place in public streets as a street campaign. It is a low-cost approach since it requires minimum material production. Commonly used tools:
- orally approaches — in person recommendation
- explanatory leaflets and brochures distributed in local communities
- Posters/handbills & fliers
- Outdoor posters

▶ **Online Campaign**   `method for digital engagement` 🖉

A campaign that is implemented online. It refers to a promotion technique that utilizes all given digital tools.

It includes:
- Digital banners and google ads
- Social Media (Instagram, Facebook, Twitter and other social platforms.)
- YouTube ads
- Advertorials in online Magazines

- to utilize all available tools (online & offline)
- to avoid the use of acronyms and eliminate the transportation jargon
- to link the campaign directly to the project/concept
- to share facts & figures when available
- to present content that will trigger the audience's interest (use vivid artworks, interactive phrasing, video clips, etc., if possible)

When to use: [indicative list]

PHASE 1: Preparation & Analysis	• as part of a broader participatory process. A step by step communication plan is recommended in order to inform and engage the public about the launch, progress and outcome of the SUMP.
PHASE 2: Strategy development	
PHASE 3: Measure planning	• as a stand-alone method in order to inform the public about a specific action or milestone of the SUMP.
PHASE 4: Implementation and monitoring	

Method in action

"Because we love you!" campaign, Berlin's transport authority[28]

"BVG - Because we love you!" is the marketing campaign of the Berlin transport authority (BVG). It advertises public transport in Berlin on all social networks. The public transport company legally is an institution under public law and as such entrusted with tasks in the public interest and owned by the state of Berlin.

Berlin, Germany

January 2015 - ongoing

All Citizens

Objective:
- to raise the awareness of citizens and commuters for current problems, complex planning processes and existing deficits through direct communication with their target group
- to create an emotional bond and to change the image of the transport authority.

Tools used:
Unconventional methods were used to present public transport as a meeting place for different sections of the society and interest groups.

All activities are bundled on one website, which provides an overview of all activities in the social networks.
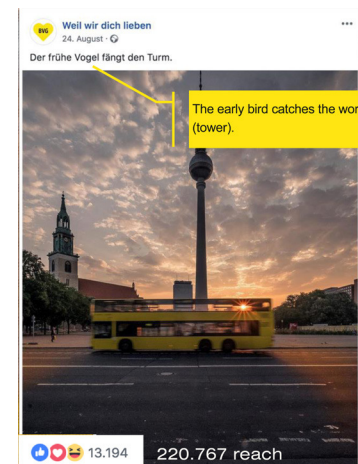
Typical Berlin clichés were taken up, but also negative aspects of public transport such as spatial restrictions, delays, or unfriendly staff, are taken up humorously and self-ironically and thus give the BVG a positive image.

Multi-channelling tools where used:

- Social networks (Facebook, Instagram, Twitter) with the distribution of its own content (music and advertising videos)
- YouTube (collaboration with known blogger for the creation of original videos that appealed to a wide range of users)
- Newspapers and magazine online advertorials
- Outdoor lighted banners to numerous metro stations
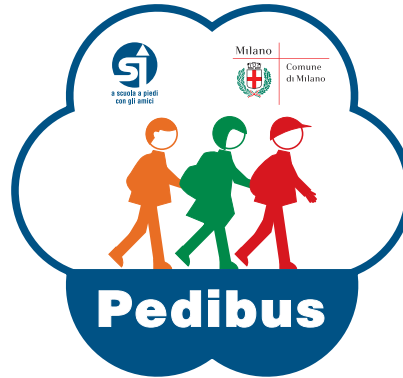- Insert brochures in local and region magazines

Results
2.7% increase in revenue from passenger charges (Annual report 2018)

PEDIBUS: get together to school safely and sustainably[1]

The PEDIBUS initiative supports primary schools' managers to encourage pupils and families to walk to school safely in organised groups following pre-defined routes.

It is a public driven initiative and facilitated by the City Mobility Agency.

Rome, Lazio, Italy

2018 – ongoing

Children, parents, school staff, local groups, shopkeepers

Objective:
- to build community among parents in order to stimulate them, in accompanying the children to school as a group.
- to encourage a bottom-up initiative led by local stakeholders (parents, school administration, local citizen groups, shopkeepers)

Photo of the initiative - Rome

The President of Roma Servizi participates in an event (IC Purificato)

Results:
To date, the network of school mobility managers reached:

- 36.000 students

- 4.000 units of teaching and administrative staff

There are 8 Comprehensive Institutes that have started the PEDIBUS initiative.

Children, the main target of the initiative, were enthusiastic, they like being in-group, and they are ethical and, easily perceive the "green message".

Parents perceive the opportunity of being leveraged of daily duty of accompanying children to school, being aware, at the same time, that other parents will take care of their children.

2.2.2 Public Event

A Public Event aims to raise awareness, as a means of stimulating interest and creating publicity. Such events provide to the organizers the opportunities to inform the public about a priority issue, a specific milestone or the entire project. Local individuals and organizations are invited to participate in them. The event is open to the public at a certain location on a set of day(s) or specific time. This method is newsworthy and generates opportunities to attract local media. As a result, it can attract public interest, which, in return, can assist in future participatory actions. Public Events can be coordinated as part of a broader participatory process or as a stand-alone activity. In both cases, it is required to be accompanied by a robust in order to inform the public about the event and ensure its success and participation.

> **Key characteristics:**
> - Strategic selection of site.
> - Casual atmosphere.
> - Allows for sensitive topics to be discussed.

Types of events[29]:

▶ **Interactive Event**

This event focuses on a specific subject or site relevant to the project and encourages participants to engage through interactive activities. The goal is to draw public attention to the project by inviting the participants to contribute in the planning process in various ways depending the required level of participation (e.g. get informed, share feedback, vote).

▶ **Pilot Event**

A test of a real public action in order to address issues concerning a local neighborhood or the city. The coordination of an on-site event helps project coordinators to receive user insights prior to finalizing the project plans.

▶ **Open Event**

A form of engagement that allows citizens to 'drop in' and learn about a particular project or policy in an informal, spontaneous way. They are typically hosted in accessible public spaces where information is provided to the people passing by through distribution of promotional material or specific aspects of the project are showcased in order to familiarize the public with the project's scope and benefits. (e.g. demonstrate an electric scooter or car for promoting electromobility)

> - **to develop an interesting and pertinent event tagline that will encourage participants to attend. The event's headline/description can make or break its success**
> - **to create consent forms. For the use of any event's visual documentation (photos or videos) a formal written permission from the participants is mandatory, especially when children are involved in the event**

When to use: [indicative list]

PHASE 1 - 4:	• to attract public and media attention to SUMP • to inform the citizens about their opportunities to participate • to highlight the sense of a place with creative programs and activities • to celebrate the development of the SUMP and involve citizens in its adoption

Method in action

VOLTARO[1]

Open space annual event for the promotion of bicycling and walking. It is linked to Sustainable Urban Mobility, as it aims at increasing the awareness of citizens for the adoption of sustainable means of transport. The event is organized by the Region of Central Macedonia (RCM).

🔍 Thessaloniki, Greece

🕐 Annual event (every September, since 2017)

👥 All Citizens

Objective:
• To increase public awareness regarding alternative, sustainable means of transportation.

Citizens can experience different types of electric bikes and cars such as: electrically powered e-bikes fully controlled by a smartphone, electric bikes on three wheels, electric skates, electric cars. Moreover, they can enter a portable cockpit and learn how to drive it, learn about the modern uses of unmanned drones, as well as many other state-of-the-art technological developments that can make daily activities in cities more environmentally friendly.

Citizens are also informed about the range of recyclable materials, ways to do recycling right, new self-managed recyclables collection structures and some of the hundreds of useful products coming from waste recycling.

Results:
• Thousands of people of all ages are informed though this event about Sustainable Urban Mobility good practices and other environmental issues.
• Every year the number of sponsorships from companies is increasing.

2.2.3 e-Engagement for Online Campaigning

E-engagement in the form of Online Campaigning is a similar method to Raising Awareness Campaign (see 2.2.1), but focuses on web-based channels and digital tools. It is an approach that can be used to attract public attention to priority issues and can be the key method for informing the public during various phases of the SUMP cycle.

Key characteristics:
- Focus on specific issues while targeting wider audience groups, since e- engagement can take place at anytime and anywhere.
- Interesting content presented in different formats

Types of implementation[30]:

▶ **Focus Group chat rooms**
Designated chatrooms where invited participants can enter via username and password.

▶ **Blog or a Social Media platform**
Use of blog networks and social media platforms where Internet users can create original content and publish it without any specific technical skills.

▶ **Project website or web/mobile platforms**
Use of websites and web/mobile platforms designed to promote and inform the audience about the SUMP process.

▶ **Online Event**
Online event which uses streaming media technology to broadcast content from a single source to multiple users simultaneously. It can features audio or visual medial files from one or more recurring hosts engaged in a discussion about a particular topic or current event.

💡 Keep in mind:
- **that this method might not be suitable for all citizens. It is limited to those who have access to digital technologies**
- **to combine this method with an offline campaign (see 2.2.1) to increase the method's inclusiveness (e.g. elderly people might encounter difficulties in using digital tools)**
- **to provision personnel for harvesting and processing the submitted information and deliver feedback to the participants**
- **to present content in intresting formats,** such as vivid artworks, interactive phrasing, video clips. Such formats assist in reaching out commonly overlooked groups in urban planning, such as people with special abilities and young people .

Success Tips

🔍 **INCREASE AWARENESS**

👥 **SPECIFY YOUR TARGET AUDIENCE**
Depending on the addressed topic you can target specific groups e.g. residents of local area or parents & children of a specific municipality or region.

⏳ **VARIABLE**
The duration and implementation period depends on the selected online medium.

€ **CHOOSE APPROPRIATE TOOL ACCORDING TO YOUR BUGDET**
The cost can vary according to the selected digital tool.
Chat Rooms, Blog or Social Media €, Online Events €€, Project website or web/mobile platforms €€€€

👤 • Raising Awareness Campaign

🕐 **APPLICABLE IN SUMP PHASES: 1 - 4**

When to use: [indicative list]

PHASE 1 - 4:	• to attract public and media attention to SUMP • to deal with sensitive issues due to the lack of face to face contact • to inform the citizens about their opportunities to participate • to celebrate the development of the SUMP and involve citizens in its adoption

Method in action

Promotion of the implementation of new unified tariff system[1]

The project was realized for the regional and city public transport in the Bratislava region.

The main objective of the practice was to promote the improved tariff system which has been implemented in the city of Bratislava and should lead to gradual increase in the number of passengers in the means of public transport in the Bratislava region.

Bratislava, Slovakia

05/2011 - 03/2012

All Citizens

Method:
The main marketing channel in this practice was in the form of online articles published on several different websites, which were promoting the new unified tariff system.

Results:
The realization of the project as well as its promotion brought:
- improvement of the tariff system of the carrier
- creation of a prerequisite for unified tariff system at all the providers of transport in the Bratislava region
- increase in the competitiveness and attractiveness of public transport in relation to individual car transport
- increase in the number of passengers in the improved public transport
- increase in the revenues of the carriers

2.2.4 e-Participation through Crowdsourcing

E-participation has been defined as "the utilization of information and communication technology in order to extend and deepen citizen's participation (Macintosh 2004)[31]. The objective is to "motivate and engage citizens through diverse modes of technical and communicative skills to ensure broader participation"[32].

Crowdsourcing is an online citizen engagement method, which enables active participation in decision-making or planning processes. This method is basically an open invitation to every citizen, willing to participate in particular issues, by commenting, sharing insights or ideas, via a free-access online platform.[33] Crowdsourcing can be used for structured or unstructured collection of opinions in various thematic fields of planning (mobility, public space, infrastructure, etc.). Crowdsourcing is commonly used for receiving: opinions, ideas and data.

Key characteristics:
- Require ICT competences, legal knowledge and communication skills.
- Allows the participation of a larger number of citizens
- Gives the opportunity to reach out to wider demographic groups

Implementation tools for e-Participation:

▶ Web platforms
Different levels of LOG IN authentication is required when using web platforms depending on the type of requested public engagement. (e.g. sharing comments requires low authentication level/ voting required high authentication level)

▶ Survey tools
For the purposes of a basic survey, there are a number of online tools available for free that provide many options for question types and a satisfying level of result processing (e.g. Google Form, EU Survey).

▶ Specialized apps
Mobile apps require ICT competences since they are custom made to each initiative. Use experience personalized engagement since the process is customized according to their preferences.

Success Tips

ENGAGE IN CO-PLANNING

DEFINE THE TARGETED CITIZENS' AUDIENCE
Depending on the addressed topic you can target specific groups e.g. residents of local area or parents & children of a specific municipality or region.

COLLABORATE WITH KEY STAKEHOLDERS
For the delivery of the crowdsourcing tool, it is recommended to collaborate with key project stakeholders (e.g. decision makers, experts).

VARIABLE
The duration and implementation period depends on complexity of the online engagement tool, human resources required and potential limitations (GDPR regulations, technical, financial etc.).

CHOOSE APPROPRIATE TOOL ACCORDING TO YOUR BUGDET
The cost can vary according to the type of implementation.
Online Survey tools €€ - Specialized apps €€€€
- Surveys
- Gamification

APPLICABLE IN SUMP PHASES:1 - 4

When to use: [indicative list]

PHASE 1: Preparation & Analysis	• to harvest citizens' insights and define challenges and opportunities with the current mobility situation
PHASE 2: Strategy development	• to invite citizens to contribute in the development of future scenarios and vision for the city
PHASE 3: Measure planning	• to invite citizens and stakeholders to select and/or validate measure packages
PHASE 4: Implementation and monitoring	• to allow citizens to provide their views on the final policy/ plans in action and suggest alterations/improvements

> **Keep in mind:**
>
> - that online crowdsourcing formats require bold engagement actions in order to reach as many target audience participants as possible (see 2.2.3)
> - to consider alternative versions of e-participating media in order to reach specific groups, e.g. Braille or audio version for people with visual disabilities
> - that this method might not be suitable for all citizens. It is limited to those who have access to digital technologies

Method in action

Reporting platform for cycle traffic in the State of Hessen, Germany[1]

The reporting platform for cycle traffic gives cyclists the opportunity to report defects and opportunities for improvement directly to the public authorities. The platform can be used by cyclists throughout Hessen and is made available free of charge to Hessen's municipalities by the state. In just a few steps, a report can be created and forwarded to the right place in the municipality. There is also the possibility to attach photos. Inquiries are forwarded directly to the responsible person in charge, who communicates with the responsible municipal office.

The reporting platform is operated by the ivm GmbH, which is organised as a private company. However, the shareholders are exclusive public authorities such as administrative districts/counties or the City of Frankfurt. The reporting platform was developed on behalf of the State of Hessen.
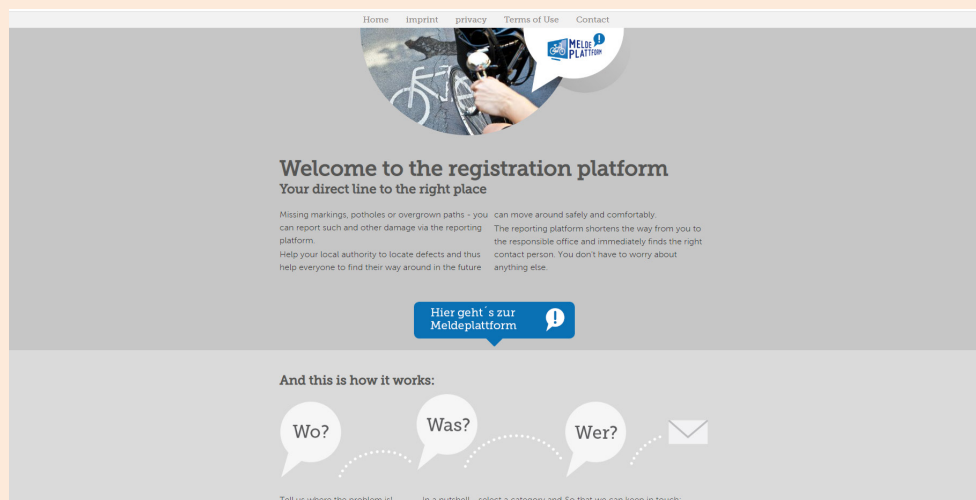
State of Hessen, Germany

April 2010 - ongoing

All Citizens
Local authorities - received reports.

source: https://www.meldeplattform-radverkehr.de/index.html#

Objectives:
- Give cyclists a direct opportunity to help design cycle paths and report problems from their own perspective
- Simplify the direct communication between authorities and citizens
- Make the improvement of the cycling infrastructure much more user oriented.

Results:
The reporting platform is used by numerous cyclists and local authorities, and there have been thousands of reports since work began. Municipalities learn out of a direct contact with citizens; thus, infrastructure is improved from the perspective of the end user.

2.2.5 Survey

A Survey is a method used for the collection of information or opinions/preferences on a specific topic of interest from a predefined group of respondents. The main point of interaction between participants and surveyors are the survey questions themselves, whether implemented in-person, on paper or digitally. Therefore, the questions need to be formulated in way that are relevant to the project's topic.[34] The responders fill in surveys as individuals and there is no interaction among them. There is a variety of ways to implement a survey:

- Postal
- SMS
- Telephone
- Online (digital tools and platforms)
- Face to Face interview

In most cases and in order to ensure the desirable sample of participants, usually surveyors choose to use a combination of the aforementioned ways to collect the data, especially in cases where a large audience is required. A survey administration should always be secured and the proper data coding should be considered already from the survey instrument design. The results are usually collated and aggregated in order for the organizer to disseminate general comments regarding the expressed viewpoints.[35]

Types:

Indicatively, and surely not exhaustively, some of the most common types of surveys used in mobility planning are:

▶ Users' satisfaction survey
They help to understand the level of the citizens' satisfaction from a provided mobility service or infrastructure (i.e. public transport, bicycle infrastructure, etc.).

▶ Household surveys/ trip diary surveys[36]
They collect information on the citizens' daily trips (i.e. purpose/ mode of transport/ duration/ start and end point of each trip made by each individual). They are typically used for the setup of a transport model.

▶ Stated – preference surveys[37]
They collect information on citizens' attitudes and mobility behaviour and help in forecasting decisions, as they harvest responses for possible choices in hypothetical situations. They are also typically used for the setup of a transport model.

> **Key characteristics:**
>
> - Harvest information from representative samples of citizens/ stakeholders.
> - Ensure that comparable information is obtained, thus enabling the analysis for meaningful statistics.
> - Support policy making processes as they can ensure data availability for specific purposes.

▶ Roadside Surveys (RSS)[38]
(For private and freight vehicles). They involve face to face interviews with drivers and are used to determine trip characteristics (i.e. origin-destination, purpose, length etc.) and vehicle characteristics or commodities carried.

▶ Delphi survey[39]
It is a structured method used for mapping of future trends. It relies on panels of expert, who are asked to reflect on rounds of questionnaires.

▶ Measure selection surveys
They are used for selecting the desirable mobility measures, usually from a predefined list of measures.

▶ Measure evaluation surveys
They can be used for understanding how the population has experienced and observed new mobility interventions.

> **Keep in mind:**
>
> - that surveys are a valuable tool for transport planners and decision makers, but, since they usually imply time and money, they should be carefully decided and designed as per their components (sampling, question design, mode of data collection)
>
> - to develop clear and neutrally worded questions. For more complex survey content or time-demanding questionnaires (i.e. stated – preference surveys or households' surveys, respectively) proper guidance to the respondent should be provided (usually through face to face interaction with the interviewer)
>
> - to pilot the survey beforehand in order to check if the questions are suitable and aligned with the survey purpose.

Success Tips

ENGAGEMENT IN CO-PLANNING

DEFINE THE APPROPRIATE CITIZEN AUDIENCE
Depending on the type and purpose of the survey, as well as the issue they address.

SELECT KEY STAKEHOLDERS
Depending on the type of the survey.
(stakeholder groups, NGOs, local associations, scientific experts, etc)

VARIABLE
It can be time consuming. Duration depends on the subject, the targeted population, and the target value of the engagement rate.

CHOOSE THE SURVEY TOOL ACCORDING TO YOUR BUDGET
It can vary depending on the selected survey types and methods.
(Face to Face, Online €€ | Telephone, Postal €€€- €€€€)

- Public Event
- Workshop
- Participatory mapping
- e-Participation
- Capacity Building
- Focus Group
- Expert Panel
- Public Consultation
- Pilot Intervention

APPLICABLE TO SUMP PHASES: 1-4

When to use: [indicative list]

PHASE 1: Preparation & Analysis	• to analyze mobility situation
PHASE 2: Strategy development	• to build and assess scenarios • to co-develop the vision and set the project indicators
PHASE 3: Measure planning	• to select packages of measures
PHASE 4: Implementation and monitoring	• to monitor, review and leverage the lessons learnt

Method in action

Clean Air Consultation Survey – Healthy Streets policy[2]

The Healthy Streets Approach is a long-term plan for improving Londoners' and visitors' experiences of the streets, helping everyone to be more active and enjoy the health benefits of being on London streets. It is a system of policies and strategies to deliver a healthier, more inclusive city where people choose to walk, cycle, and use public transport. Within the frame of this policy, the TfL implemented the Clean Air Consultation Survey.

source: London.gov

Method used:
An online closed response survey was used which was linked in London's government web platform. Users required to sing in which in return allowed them to submit the survey's answers. Furthermore, it provided them with the opportunity to comment in different public mobility issues by posting their proposals, complains and evaluations in a blog forum template.

London, UK

July 2016

All citizens of London

Results:
10.000 participants

- 81% of the participants felt that air pollution is a very big problem
- 72% supported the idea of charging owners of high-polluting vehicles.

Due to the successful participation the survey was established, and it is repeated every year

In April 2019 in accordance with the survey results, the City of London introduced the central London Ultra Low Emission Zone (ULEZ). Vehicles that don't meet tough emissions standards are charged to enter the zone.

2.2.6 Public Consultation

Public Consultation is a regulatory process that invites citizens and stakeholders to provide their views and feedback on the current stage of the project. It can be conducted either for policy making or urban planning projects. The main objectives are to improve government's efficiency[40], transparency and increase public involvement in large-scale projects.

This method is a public enquiry targeted to a group of randomly selected citizens. The aim is to broaden the debate on a given issue and include the viewpoints of non-experts in order to inform policymaking or urban planning. The outcome is a written consensus statement which expresses the expectations, concerns and recommendations of all involved public actors. The statement is published and directed to policy makers for integrating the outcomes to the final version of the policy or plan.

Key characteristics:

- Experts and government officials share project information and details with the participants.
- A limited number of citizens is involved in the decision- making process. The selection of citizens is implemented randomly from the general population.
- It is usually the preferred formal type used for final approval of major policies or large-scale infrastructure projects.

Keep in mind:

- to involve participants in the evaluation process, through a Survey (see 2.2.5). This feedback will provide valuable information which will improve future consultations

- to provide reports demonstrating the consultation results while showcasing the participant's contribution

- to notify the participants for the publication of the report/feedback. Ask for their e-mail or other contact when collecting responses. It will also be helpful to create a database that will facilitate promoting further consultations

- to consider alternative versions of consultation documents in order to reach specific audience, e.g. Braille or audio version for people with visual disabilities

Success Tips

INCREASE AWARENESS ENGAGE IN CO-PLANNING

RANDOM CITIZEN SELECTION
A group of randomly selected citizens. (recommended number of participants: 12—24)

INVITE EXPERTS, CO-COORDINATE WITH GOVERMENT OFFICIALS
Policy and decision makers introduce the project/ present results and plans.

1 DAY - 3 WEEKS
Depending on the project, the duration can range from 1 day to 3 weeks

CHOOSE APPROPRIATE TOOL ACCORDING TO YOUR BUGDET
Depending on the type of implementation., physical €€€ or online €€.

- Surveys
- e-Participation
- Gaming

APPLICABLE IN SUMP PHASE: 1 - 3

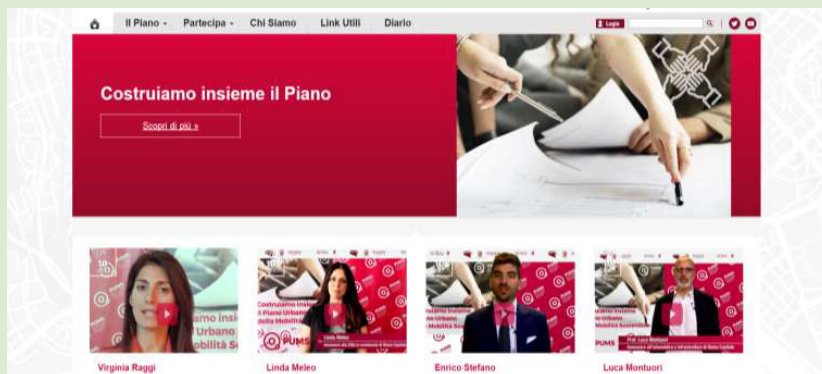### When to use: [indicative list]

PHASE 1 - 3	- to encourage a stronger and clearer voice of the public in the policy or planning process - to improve policymakers' understanding of the citizens' and stakeholders' concerns and recommendations

Method in action

Public consultation in Rome's SUMP participatory approach

Rome's SUMP was generated through an intense participatory methodology. The SUMP introduced a online public consultation approach, involving the citizenship through a specific open portal to allow the knowledge and voting of the sustainable proposals.

Rome, Italy
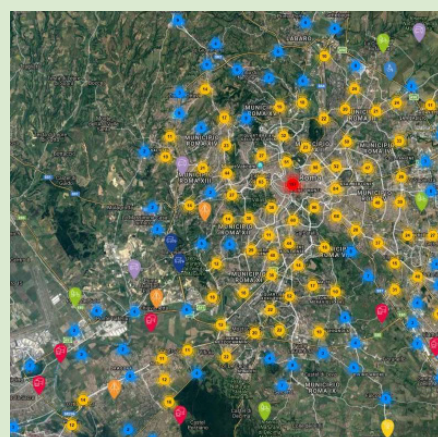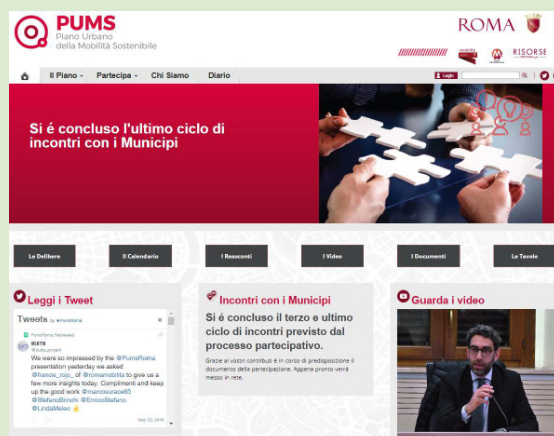
September 2017 — August 2019

All citizens of Rome, Municipal boroughs, Association of traders, Local Authority, Association of traders, Cyclist associations, Road victims association

Objective:
The ultimate goal of intensively disseminating the portal was to involve as many citizens as possible.

The consultation phase involved the adoption and publication of the SUMP.

Through the portal (www.pumsroma.it) each citizen pointed out solutions to achieve a sustainable mobility: all the proposals have been examined and each one has been answered. For the first time citizens or their groups (cyclist associations, road victims' association, residents) were involved in a planning tool as the SUMP, during the different drafting phases, using different techniques as web portal, specific meetings with stakeholders (trade unions, association of traders, municipal boroughs). Through the portal, each citizen was able to determine exactly his/her proposal on the municipality map, regarding a number of topics: public transport, private transport, urban logistic, cycling, environmental islands, accessibility and ITS.

source: https://www.pumsroma.it

2.2.7 Focus Group

A Focus group is a structured discussion among a small group of participants, facilitated by a skilled moderator. This method is designed to obtain insights, ideas and opinions from the participants on a specific topic. **"Focus group" is a combined method of focused interviews and a group discussion.**[41]

Key characteristics:

- It is typically conducted face to face, but it may also be organized via online meetings.
- Questions are asked in an interactive group setting where structured discussion among participants is highly encouraged.
- Participants are selected based on their knowledge or level of interest to the specific topic.
- Neutral and casual environment

Method in action

CASI project citizen panel meetings[1]

Within the CASI project, two Citizen panel meetings were organized in Coventry in order to promote inclusiveness in the debate on sustainable innovation.

🔍 Coventry, WM, UK

🕐 October 2014 – October 2015

👥 Citizens

Objectives:
To promote inclusiveness in the debate on sustainable innovation, by consulting citizens on their visions for a sustainable future.

1st round of meetings: citizens worked out their visions for the sustainable future state of the environment. Then, these visions were translated into research priorities on sustainable innovation.

2nd round of meeting: citizens could validate the research priorities identified by the experts.

Results:
The first 12 Citizen Panel Meetings produced 50 citizen visions for a more sustainable future.

In the second round of 12 Citizen Panel Meetings, the citizens validated, and ranked research priorities produced by expert workshop. They also produced a Top-10 of the entire list of the 27 research priorities, based on citizens' individual votes.

Success Tips

ENGAGE IN CO-PLANNING

TARGET SELECTED CITIZENS
Small groups of citizens (4 -12 people). Citizens of all ages and abilities can participate depending on the topic addressed and the selected facilitation tools

SELECT ALL TYPES OF STAKEHOLDERS
It is advised to invite stakeholders of all types in order to ensure a holistic perspective of generating opinions depending each time on the addressed topic

2-6 HOURS

MODERATE (€€)
It requires human resources for the implementation and facilitation of the workshops and interviews

- Surveys
- Gaming

APPLICABLE TO SUMP PHASES: 1 - 4

When to use: [indicative list]

PHASE 1: Preparation & Analysis	• to capture local context characteristics
PHASE 2: Strategy development PHASE 3: Measure planning	• to explore the initial concept and brainstorm. • to respond to specific questions/issues or to be used for building consensus
PHASE 4: Implementation and monitoring	• to test, evaluate, or conduct a measure review

---

💡 **Keep in mind:**

- that professional moderators are required both for the organization and the implementation

- to show appreciation of participant's contributions. Appreciation can be demonstrated by offering a buffet, acknowledging participants in the final report, through events photos and thank you emails

2.2.8 Expert Panel

An Expert panel is a specialized discussion among a variety of experts and active actors of a project.[42] Its objective is to synthesize experts' input from different disciplines on a certain topic and produce a vision or recommendations for future possibilities and needs for the selected topic/ project.

Key characteristics:

- The experts are selected based on the relevance of their field of expertise.
- The discussion is facilitated by a neutral moderator (see 2.2.7 for recommended facilitation tools).

Types:
- Round-table discussions
- Online, in a form of a platform discussion

Method in action

Transdanube Pearls: Network for Sustainable Mobility along the Danube[1]

The practice concerns the creation of a network, involving actors along the Danube, committed to the promotion of sustainable mobility in tourism. The practice included the creation of a team of experts, who identified the potential members of the network and analysed the current situation of sustainable mobility along the Danube.

🔍 Bratislava, Slovakia

🕐 January 2017 -June 2019

👥 Mobility Experts

Objectives:
Promote sustainable mobility options against the predominance of car used by tourists and support cooperation between stakeholders, thus increasing the visibility of sustainable mobility services.

Results:
The mobility experts personally took the bike road between the Pearls and defined the problematic sections. Thus, concrete steps were taken like putting a bike carrier on a bus in the most dangerous sections, which has an appreciated by locals.

Success Tips

🔍 **ENGAGE IN CO-PLANNING**

👥 **INVITE AN INTERDISCIPLINARY GROUP OF STAKEHOLDERS**
It is advised to invite experts from many disciplines.

⏳ **2-6 HOURS**

€ **MODERATE (€€)**
Depending on the number of events and required level of participation.

△ • **Survey**

🕐 **APPLICABLE TO SUMP PHASES: 1 - 3**

When to use: [indicative list]

The coordination of an Expert Panel is particularly appropriate for complex issues that require advanced technical knowledge and therefore require a synthesis of multi-disciplinary expertise.

PHASE 1: Preparation & Analysis	• to foster cooperation and improve information sharing and expertise • expertise exchange
PHASE 2: Strategy development	• to build consensus on SUMP decisions • to develop evidence-based policymaking
PHASE 3: Measure planning	• to build alliances for measure implementation

💡 Keep in mind:

- **Panels need to be chaired and facilitated effectively, to maintain motivation and morale, to resolve conflicts, to monitor timetables and external constraints, to prevent over-dominance of strong personalities.[43]**

- **The panel participants should be diverse and one or more creative thinking individuals who will bring diverse viewpoints to bear, work well in groups and are prepared to speak freely without feeling that they have to represent a particular interest group.**

2.2.9 Workshop

A workshop is an intensive planning session where citizens, stakeholders and experts collaborate on the development of a shared vision.[44] It is a face-to-face process, designed to bring people from various sub-groups of society into a consensus by providing adequate information to all participants and the equal opportunity to contribute in co-creating a vision/ proposal.

> **Key characteristics[45]:**
>
> - It targets situations which require the development of cross-cutting strategies and interdisciplinary collaboration.
> - Participants can provide ideas and solutions to problems that are outside their areas of expertise.
> - Project coordinators build partnerships and synergies with the relevant stakeholders and the public.

Facilitation Tools: [indicative list]

▶ **World Cafe**
A process for facilitating collaborative dialogue and the sharing of knowledge and ideas to create a living network of conversation and action. Participants are divided into tables (max 7 people per table) while a facilitator has the task of asking questions and keeping track of the answers. At certain intervals, the participants change the tables, mingling, except for the facilitators who remain at the same table.[46]

▶ **Participatory Scenarios**
A set of narrative descriptions of potential future scenarios that allows for the integration of participant's views on the key influencing factors of future developments and the embedding of scenario assumptions in a specific regional or local context.[47]

▶ **Graphic Facilitation**
A creative process for summarizing collaborative dialogue in cognitive maps organized in words, signs and drawings.

▶ **Idea Rating Sheets**
By using the leverage of non-judgmental competition, this method favours collaboration within the groups. The participants gather in tables where they elaborate proposals that are reported on the appropriate cards (idea rating sheets). The cards are then displayed, and everyone can vote the others' proposals, anonymously, and add comments.

Success Tips

🔍 **ENGAGE IN CO-PLANNING**

👥 **INVITE DIFFERENT TARGET GROUPS**
Bring citizens from various sub-groups of society

SELECT ALL TYPES OF STAKEHOLDERS
It is advised to invite stakeholders of all types in order to ensure a holistic perspective of generating opinions

⏳ **1 - 3 DAYS**

€ **DEFINE THE WORKSHOP ACTIVITIES ACCORDING TO YOUR BUDGET AND THE NUMBER OF PARTICIPANTS**

- Surveys
- Gaming
- Pilot Intervention

🕐 **APPLICABLE TO SUMP PHASES: 1 - 3**

When to use: [indicative list]

PHASE 1: Preparation & Analysis	• to foster active stakeholder or citizen participation
PHASE 2: Strategy development **PHASE 3:** Measure planning	• to encourage a stronger and clearer voice of the public in the policy/planning proces • to improve policymakers' understanding of the citizens' and stakeholders' recommendations • to co-design SUMP visions • to develop a cross-disciplinary SUMP vision

> **Keep in mind:**
>
> - to include warm up activities to kick start creative and imaginative atmosphere. Such activities are called "icebreakers" and their objective is to inspire creative thinking and familiarize participants with each other in a delightful way
>
> - to carefully facilitate the discussion in order to maintain motivation and morale, to resolve conflicts, to monitor timetables and, to prevent over-dominance of strong personalities
>
> - to show appreciation of participant's contributions. Appreciation can be demonstrated by offering a buffet, acknowledging participants in the final report, through events photos and thank you emails

Method in action

Workshops for the establishment of Active Mobility Check for Municipalities in Hessen[1]

The Active Mobility Check (AMC) is a marketing tool to promote a better environment for active mobility in municipalities. For the creation of the tool participatory workshops where implemented involving different actors (municipalities, universities and transport authorities and other associations and organisations).

State of Hessen, Germany

March 2018 - ongoing

municipalities, universities and transport authorities and other associations and organisations

source: https://www.nahmobil-hessen.de

Objectives:
Strengthen active mobility culture and planning on all municipal levels and provide the opportunity for political authorities to present outputs specifically in a media attentive way.

Methods used:
- Workshop - meetings: Politicians and administration worked together in workshops where they discussed the status-quo and possible measures for improving active mobility. (depending on the local situation, also associations, organisations and selected citizens can be involved)
- Workshops - City walks: where all participants explore the municipality together, while they were visible for citizens.

2.2.10 Participatory Mapping

Participatory mapping - also called community-based mapping - is a general term used to define a method that combines the tools of modern cartography with participatory approaches in order to represent the spatial knowledge of local communities.[48] It relies on the local users' experiential knowledge of their local environments, which can be expressed in a geographical framework easily understandable and universally recognized.

Participatory maps often represent a socially or culturally distinct understanding of the urban environment and include information that is excluded from mainstream or official maps. Maps created by local communities represent the place in which they live, highlighting those elements, which communities themselves perceive as important, such as specific spatial qualities, unexpected landmarks etc.

Participatory mapping is categorized by the selected tool for map production. The processes used to create the maps can be as valuable as the maps themselves. Participatory maps are designed around a common goal and a strategy for use and are often made with input from an entire community through an open and inclusive process.

Key characteristics[49]:
- It represents the agenda of the community by showing information that reflects the community members' aspirations and needs.
- Participatory maps are not produced by formal media; a participatory map may be just a sketch or may be incorporated into a sophisticated computer-based GIS (geographic information system).
- Embrace diversity in presentation and content as they are not expected to follow conformity guidelines.

Types[50]:

▶ **Participatory Paper Maps on paper**

This type is conducted by using paper scale maps if the selected area.

▶ **Participatory 3D models**

This type is conducted by creating three-dimensional representation models using sheets of cardboards and topographic maps and other low-cost / upcycled materials.

▶ **Participatory geographic information systems (PGIS)**

This type is conducted by using computer-based systems that capture, manage, analyze, store and present detailed geographic information. Participants are asked to use their smartphones.

Success Tips

ENGAGE IN CO-PLANNING

SELECT TARGETED CITIZEN AUDIENCE
Narrow the target audience in order to be relevant with the project's requirements.

COLLABORATE WITH KEY STAKEHOLDERS
Depending on the subject is recommended to collaborate with key stakeholders in order to access the audience needed according to the project's scope.

VARIABLE
Variable from one day to several weeks depending on the addressed topic.

CHOOSE APPROPRIATE MAPPING TOOLS ACCORDING TO YOUR BUDGET
(Participatory Paper Maps €€ | Participatory 3D Models, PGIS €€€€)

- Survey
- Gaming
- Gamification

APPLICABLE TO SUMP PHASES: 1 - 2

When to use: [indicative list]

PHASE 1: Preparation & Analysis	• to indicate opportunities and needs from the user's perspective
PHASE 2: Strategy development	• to help citizens and stakeholders communicate experiential knowledge to SUMP planners • to assist in land use planning

> **Keep in mind:**
>
> - to follow common cartographic conventions (e.g. Google Maps) in order for the participatory maps to be seen as an effective communication tool
>
> - that the higher the level of community participation, the more beneficial the outcome because the final map will reflect the collective experience of the group producing the map
>
> - the participatory 3D models are particularly applicable when the targeted audience is children

Method in action

Public Participation GIS for sustainable urban mobility planning in regions of Poland[51]

The practice presents a case study where Public Participation GIS (PPGI) methods was used in sustainable urban mobility planning in the city of Lodz, in Poland.

The PPGIS methods were applied in appropriate stages of the planning, discussing key issues related to participant recruitment and provided guidelines for planners working on sustainable urban mobility.

Lodz, Poland

28th February 2016 to 14th March 2016

All Citizens

The case study was conducted in Lodz (population ca 700,000) spatial extent of the survey 293.25 km2. The main objective was to consult with the public a draft project of sustainable public transport model and more particularly:

- to identify parts of the city with low rating of public transport services
- to single out locations with problems and issues related to the use of public transport (e.g. uncomfortable interchanges)
- to establish locations of transport infrastructure (e.g. 'park and ride' facilities) suggested by the public
- to collect general suggestions for public transport service improvements

Tools used:
Participant recruitment was open and voluntary and information about the survey was advertised on posters at bus and tram stops, as well as in local and social media outlets.

The data collection was carried out entirely online through a geo-questionnaire. To capture an overall evaluation of public transport accessibility the participants were requested to answer a single question

"How would you evaluate public transport accessibility in your residential location?"

The answers were provided on a Likert-like scale and geocoded to residential locations provided by participants. Such geocoding allowed for cartographic presentation and spatial statistical analysis (heat maps).
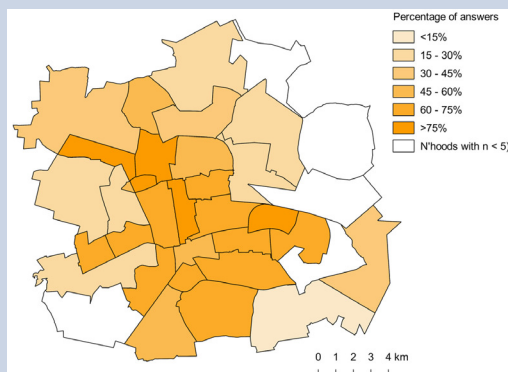

Results
The participants of the survey for public transport system reached 2387 citizens, pointing out 1654 problematic locations.

2.2.11 Capacity Building

Capacity building is a method that develops further a certain range of skills and competencies of the participants. It is a continuous and reciprocal process of adjusting people's attitudes, values and organizational practices. It builds up appropriate knowledge and skills among various stakeholders and citizens in a partnership — to strengthen each partner's ability to make effective decisions and take full responsibility of the consequences of such decisions.[52]

Key characteristics:

- It focuses on building up knowledge.
- The participants are selected based on their professional status and relevance to the topic.
- It is a repeated process that requires educational/ instructional material.

Types:

- Trainings / Seminars/ Workshops
- Conferences
- Hackathons
- Training material (manual, Handbooks etc)

Keep in mind:

- to provision and coordinate capacity building sessions when innovative technologies or methods are being integrated to the regular workflow. (eg. an e-participation approach for SUMP development)

- to Celebrate and promote achievements. It is important for the morale, confidence, and motivation of participants to promote every project's milestone

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Success Tips

INCREASE AWARENESS ENGAGE IN CO-PLANNING

SELECT TARGETED CITIZEN AUDIENCE
Narrow the target audience in order to be relevant with the project's requirements.

FOCUS ON KEY STAKEHOLDERS
All types of stakeholders can participate, depending on the topic a targeted group of particiants is adviced.

1 - 5 DAYS
Depending on the addressed topic. It can last from one day to 5 days.

VARIABLE
Depending on theimplementation type. Training materials €€ - Training sessions & Hackathons €€€€

- Surveys
- Gaming

APPLICABLE IN SUMP PHASE: 1, 4

When to use: [indicative list]

PHASE 1: Preparation & Analysis	• to increase citizens' capacity in relation to mobility planning • to train stakeholders and policy makers on specific procedures regarding SUMP process
PHASE 4: Implementation and monitoring	• engage and inspire municipalities to follow a good practice • increasing citizens' awareness for sustainable mobility solutions

Method in action

REFORM: Fostering regional cooperation and capacity building for SUMPs[1]

🔍 Region of Central Macedonia, Greece

🕐 December 2017 — March 2018

👥 Municipalities

Region of Central Macedonia, Greece - Presentation of 38 municipalities

The practice established a permanent regional cooperation for increasing capacity of the local Municipalities and facilitating the deployment of their Sustainable Urban Mobility Plans (SUMPs). It was driven by cooperation of the regional governance authority of Central Macedonia and HIT/CERTH, a transport research institute.

Objectives:
- tackling lack of knowledge concerning SUMPs
- integrate regional policies into local SUMPs

Results:
Knowledge and understanding of the SUMP process increased the regional and municipal capacity.

Regional public servants will be part of the new cooperative structure that is currently under development: the "Regional Observatory". The Observatory will interact with the Municipalities in various fields (including mobility) and will be used for monitoring the progress towards defined indicators (including also sustainable mobility indicators).

Municipal representatives overcame their knowledge gaps in SUMP processes, but also interacted with each other for tackling severe administrative issued in SUMP procurements.

Within the period following the capacity building seminars, eight (8) Municipalities procured their SUMPs and five (5) of them are currently under SUMP development

2.2.12 Pilot Intervention

Pilot intervention is an approach were physical interventions of a temporary character are implemented on trial base, like a prototype, leading towards a more permanent transformation in the future. This approach refers to small scale improvements as a way to stimulate more substantial investments. It allows local actors to test new concepts before making substantial political and financial commitments. This method is often referred to as "Guerrilla Urbanism".

Key characteristics[53]:

- A harvest of local ideas for local planning challenges.
- Short-term commitment and realistic expectations.
- Low risk, with a possibly high reward.
- Building trust among disparate interested groups and local authorities.

"Guerrilla Urbanism" can take many forms and in the last decade such practices have inspired a growing movement for "Do It Yourself" practices, usually led by the local community, in the neighborhood or city scale. The most well-known approach is "Tactical Urbanism".

"Tactical Urbanism"

A city and/or citizen-led approach to using short-term, low-cost, and scalable interventions intended to catalyze long-term change.

Indicative "Guerrilla Urbanism" activities:
- urban gardening, using abandoned sites/areas for gardening
- de-paving, the act of removing unnecessary pavement to transform driveways and parking into green space, walking
- pop- up bike lanes, by placing potted plants or other physical barriers

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Keep in mind:

- that a pilot intervention is particularly useful for infrastructure projects (e.g. new bike lanes, traffic calming measures)

- to map and involve early on key local stakeholders around the pilot intervention location in order to ensure local allies that share the vision and will eventually advocate for the pilot intervention purpose

---

Success Tips

INCREASE AWARENESS ENGAGE IN CO-PLANNING

OPEN TO CITIZENS OF ALL AGES

INVITE KEY STAKEHOLDERS
It is recommended to collaborate with key stakeholders in order for the interventions to have the requested result.

SHORT TERM
From 1 week to 3 months, depending on the action.

MODERATE COST (€€)
Use of cheap or donated materials. Assistance from volunteers.

- **Raising Awareness Campaign**
- **Survey**
- **Public Event**
- **Workshop**

APPLICABLE TO SUMP PHASES: 4

When to use: [indicative list]

PHASE 4: Implementation and monitoring	• to identify small but pressing issues, expressed by the community
	• to increase citizens' awareness for sustainable mobility solutions

Method in action

Tactical urbanism approach for developing the Walk Bike Master Plan in Burlington VT, USA[54]

The Burlington City Council collaborated with Street Plans in order to finalize its first comprehensive plan for walking, biking, and active mobility in Burlington. The scope of this practice was to improve pedestrian and bicycle conditions, by actively engaging citizens of all ages into the planning and prototyping process.

Burlington, Vermont, USA

2010 - 2016

All Citizens

Before and After photo of one of the Demonstration Projects at Pine and Kilburn

Method:
Implementation of temporary "Demonstration Projects" which allowed people to physically experience and provide direct input on pedestrian and bicycle infrastructure designs. Demonstration Projects refer to short-term or pop-up installations created with donated, borrowed, or low-cost materials.

For Plan Burlington VT Walk/Bike, the Department of Public Works partnered with Local Motion and dozens of volunteers to create a series of Demonstration Projects in Burlington's Old North End and South End neighbourhoods.

These projects expanded the conversation about walking and biking beyond the traditional public workshop framework, allowing residents, business owners, and city agencies to physically experience and react to new types of pedestrian and bicycle infrastructure. To maximize public input, the projects were installed during Burlington's popular South End Art Hop and Open Streets BTV events.

Results:
During the "Demonstration Projects":
•   approximately 25 volunteers participated
•   more than 12,500 people were reached
•   nearly 400 survey responses were received, using a cell phone-based survey platform called Textizen
The "Demonstration Projects" represented an unprecedented collaboration between Burlington's government agencies, advocates, local businesses, and residents. This broad network of people had the change to involve with the technical planning process and experience new and unfamiliar street design types.
•   The City adopted a full-scale demonstration project program with the intention to repeat them again in different locations.
•   The City adopted the Quick Build program + guide, which takes the concept of the demonstration but applies it for a longer, interim period (1-5 years) in advance of more permanent, costlier changes to streets/public spaced.
•   The state-wide non-profit went forward and developed their demonstration toolkit to bring the concept in Burlington state-wide.

2.2.13 Gaming

The "Gaming" approach can be described as a chameleon method. This approach masks learning technologies and pedagogical principles in game-based environment with the objective of engaging and motivating participants by offering entertainment and joy.

Types:

According to Franciszek Szlosek, the "gaming" approach can be categorized in following types[55]:

- SIMULATION-BASED — actions taken by players resemble actions taken by people in real situations in everyday life.
- DECISION-BASED — role play by players with presentation of thoughts, statements and attitudes.
- PSYCHOLOGICAL — based on interactions between individuals or groups striving to achieve set goals.

Game Categories

▶ Location based games

Games with competitive elements that are alternations of existing board games, implemented on a large scale, performed in an urban area. The participants solve tasks set in the scenario according to their own variants. The game can be combined with side events such as, on-street happenings and sports games.

▶ Strategic games

It is a form of conducting business activity under virtual, not real, conditions. Its main advantage is the possibility to observe the behaviours and effects of activity of businesses without risk and costs related to experimenting[56]. i.e. costumed board-games or card games.

Keep in mind:

- to provide required features in order to allow use and access for citizens of all backgrounds and abilities
- that it is a method with great acceptance in younger audience as it combines fun and educational elements along with rewards
- that it is a chance to negotiate multiple solutions in a very casual and playful context. Encourage stakeholders to discuss and negotiate different scenarios regardless of their professional or hierarchical background

Success Tips

INCREASE AWARENESS ENGAGE IN CO-PLANNING

SPECIFY YOUR TARGET CITIZEN'S AUDIENCE
Target specific groups according to the subject (e.g. residents of local area or target only children for educational reason).

INVITE KEY STAKEHOLDERS
All types of stakeholders can participate, depending on the topic a targeted group of participants is adviced.

VARIABLE
The duration and implementation period depends on the selected "gaming" type and category.

VARIABLE
The cost can vary according to the game category. Strategic Games €€ - Location based games €€€€

- Public Event
- Workshop
- Focus Group
- Capacity Building
- Participatory Mapping

APPLICABLE TO SUMP PHASES: 1 - 4

When to use: [indicative list]

PHASE 1- 4	• to get insights for the current situation • to decide on vision packages of measures • to increase awareness for the implemented measures

Method in action

Trendsportal card game - assisting in SUMP planning, Venlo, Netherlands[1]

The practice concerns a card game that contains the goals of the Sustainable Urban Mobility Plan (SUMP) of the Municipality of Venlo in each card.

🔍 Venlo, Netherlands

🕐 December 2018 – February 2019

👥 government officials, municipalities, stakeholders, citizens, academics

Method:
A strategic card game.

Players are asked to select specific cards (goals) and write down their substantiation and proposals for the achievement of the goals.

Results:
- The game helped a lot in the smooth running of the SUMP decision-making process in the Municipality of Venlo.
- Around 100-150 stakeholders participated in the game (staff members of the Municipality; entrepreneurs; citizens; teachers/pupils/students; cyclists'; people with disabilities; members of the town council).
- During the game sessions held, the goal "support the environment and energy transition" got the most attention, so this confirms that the stakeholders think this should be the most important subject in the municipal mobility policy.

2.2.14 Gamification

The "Gamification" method has been broadly defined as the use of game-elements in non-game contexts.[57] It refers to an instructional approach with the aim to increase engagement, motivation and participation. Game strategies, such as point scoring, competition features, rules of play, etc., are integrated to an online platform or a mobile application.[32] It can revolutionize training, from gaining basic knowledge to enabling critical thinking for fostering a structured dialogue among actors.

Key characteristics:

- It provides participants with proactive directives and feedback through game mechanics and game dynamics.
- It simplifies learning and makes it more immersive and interactive through active participation and observation.
- It is likely to sustain a long-term engagement and thus, effectively influence behavioural change on the certain topic.
- It is suitable for engaging heterogeneous groups of individuals with different skills, expertise and interests.
- It can address serious topics with a non-formal approach.

Gamification principles:

- challenges and rewards
- competitions
- personalization
- game levels based on user's experience

Keep in mind:

- to create the appropriate mechanics to support the address topic in order to create a compelling user experience

- that a user's analysis is required in order to understand the participants needs and habits and sketch out a compelling procedure

- to provide the participants with something pleasurable and repeatable to do - along with feedback that helps them recap increasing value over time from that activity

---

Success Tips

INCREASE AWARENESS
ENGAGE IN CO-PLANNING

SPECIFY YOUR TARGET CITIZEN'S AUDIENCE
Depending on the addressed topic you can target specific groups i.e. residents, children, cyclists, etc.

COLLABORATE WITH KEY STAKEHOLDERS
Depending on the subject is recommended to collaborate with key stakeholders in order to access the audience needed according to the project's scope.

VARIABLE
It is a long-term strategy. It is critical to plan the ideal timeframe so users can build their experience over time.

CHOOSE KEY PARTNERS
It is an expensive method and requires specific expertise and knowledge for the design and execution of the game app.

- **Raising Awareness Campaign**
- **e-Participation**
- **Participatory Mapping**

APPLICABLE IN SUMP PHASES: 1 - 4

When to use: [indicative list]

PHASE 1 - 4	• for increasing awareness for SUMP interventions • for getting citizens' feedback for SUMP processes

Method in action

MOTIVATE app: a crowdsourcing and interactive learning environment[1]

where rewards and application of game-design elements play a pivotal role in awareness raising for sustainable mobility promotion and for collecting data for SUMPs development

- The MOTIVATE app is a cloud-based tool that collects data and provides first level overview of daily trips and travellers' opinions.

- MOTIVATE tries to capture citizens' and visitors' mobility habits and needs, while triggering their interest via the provision of rewards.

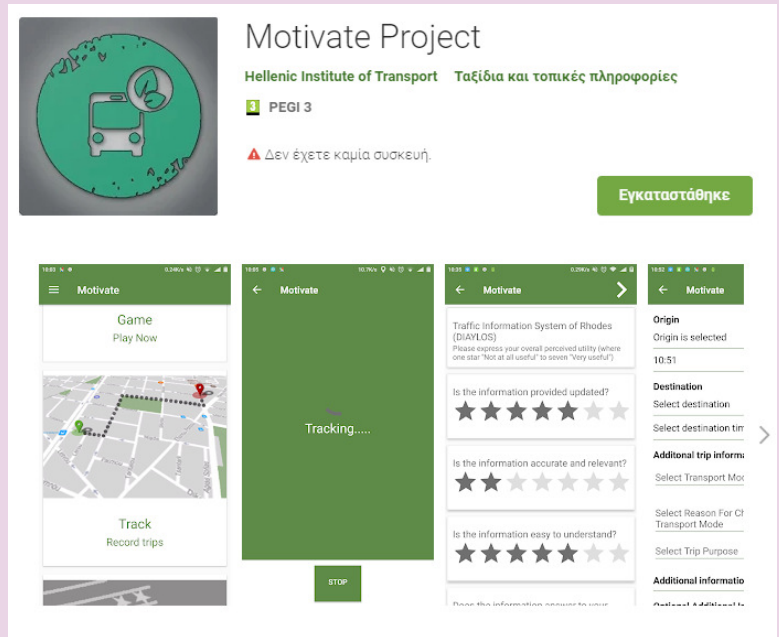🔍 Thessaloniki, Greece (transferring exercise)

🕐 1/9/2018 - 31/9/2018

👥 Citizens and Tourists in Thessaloniki

Wider area of application — MOTIVATE project pilot sites:

Initial test beds of MOTIVATE app were the cities of Ioannina & Rhodes (GR), Almada (PT), Siena (IT), Larnaca (CY) (pilot period: 2018-2019)

Focusing on citizens' involvement in the development and implementation of SUMPs, the MOTIVATE app tries to capture citizens' and visitors' mobility habits & needs developing in this way a good (database) starting point for the authorities to plan interventions and improve services. In order to 'motivate' the travellers to daily use the specific platform providing their personal data, an awareness raising game was developed — providing personal data (daily trips, existing mobility measures evaluation, future mobility interventions assessment) allows for points collection that can be redeemed at the game.[58]

MOTIVATE game interface

Objectives:
- Transform travellers into active agents of change of the new low carbon era.

Results:
MOTIVATE app use was launched to Thessaloniki in September 2018, through the European Mobility week and its pilot testing phase lasted for one month.

Through the testing period of the system in Thessaloniki:

- over 100 citizens and visitors, supported the participatory approach of decision-making process, providing insights for their real travel needs.
- almost 800 users became active agents of Sustainable Mobility adoption by declaring their daily O-D trips.

Additionally, the platform was promoted in many conferences and events and more than 2000 people raised their awareness in terms of sustainable mobility.

2.2.15 Ambassador Campaign

The "Ambassador Campaign" method is a form of indirect promotion by collaborating with important public figures (celebrities, opinion-leaders, influencers). It is a highly effective way of communicating an issue or promoting a concept. The "Ambassador" is responsible for delivering a consistent but indirect message that will cultivate relationships with the vision and goals of each initiative.

Key characteristics:
- It generates Word of Mouth communication.
- It leverages the Ambassador's popularity and reputation.

Keep in mind:
- that a user's analysis is required in order to define the criteria for the selection of the appropriate public figure

Success Tips

INCREASE AWARENESS

TARGET CITIZENS OF ALL AGES

VARIABLE
It is a long-term strategy.

VARIABLE (€ -€€€€)
It depends on the selected public figure. The cost can be reduced in the event of donnor collaborations.

APPLICABLE IN SUMP PHASES: 1 - 4

When to use: [indicative list]

PHASE 1 - 4	• to raise citizens' awareness towards sustainable mobility

2.2.16 Popular Events

The "Popular Event" method is an indirect form of promotion where the popularity of a current event is capitalized in order to gather attention for an additional issue.[59] The term "popular" refers to all types of events and happenings that are well established and known to the public. From major sports events and games to cultural events and festivals.

Key characteristics:

- Utilization of well-established events and happenings.
- Effective tool to achieve high exposure with minimum cost implementation.

Keep in mind:

- to select well established events that are known to the public

- to support your actions with strong communication activities, such as a robust Raise awareness campaign (see 2.2.1)

Success Tips

INCREASE AWARENESS

TARGET CITIZENS OF ALL AGES

1 DAY - DAYS
Usually they are one day

MODERATE (€€)
Depends on the requested contribution to the "Popular Event".

- Raising Awareness Campaign

APPLICABLE IN SUMP PHASES: 1 - 4

When to use: [indicative list]

PHASE 1 - 4	• to raise citizens' awareness towards sustainable mobility and promote implemented measures and actions

Method in action

FORMULA E ROME E-PRIX: An event's campaign supporting shift to sustainable mobility[1]

Lazio, Italy

Yearly, since 2018, from January to April

All Citizens

During the E-prix of formula E Championship, Rome Mobility Agency (RSM) draw up a communication plan mainly addressed to citizens and employees living and working in the EUR borough, close to the circuit, to discourage the private vehicle use in favour of public transport for the whole event period, suggesting the choice of alternative road routes, in particular on the closing days of via C. Colombo.

Objectives:
- Raise citizens' awareness towards sustainable mobility. Rome's accession to the e-prix also aims to promote a new vision of electric mobility: smart, high-tech, and compatible with the environment.

Results:
- The campaign to promote sustainable transport during the Formula E event has been on RSM's web platform for about a month, producing 130.260 hits.
- The campaign was launched on social networks: 41 posts/ tweets were published on RSM channels, producing 7.364 entrances to the page with all the info.

3

Marketing Techniques and Engagement Methods overview

3.1 Comparative analysis

In the table below, all techniques and methods are summarized. The table provides an overview regarding:

- the key characteristics
- brief descriptions
- type of participants
- duration and timeframe of implementation during the SUMP cycle
- cost estimations
- method complementarity

Marketing Techniques	Participation Method	Definitions / Key Characteristics / Types or Tools
Word of Mouth (WOM) **Cause Marketing**	**Raising Awareness Campaign**	A promotional campaign which uses several tools in order to reach as many individuals as possible. Key characteristics: -Clear objectives and success target goals. -Focus on specific issues and the relevant audience target groups. -Interesting content presented in different formats Types: -Offline campaign -Online campaign
Word of Mouth (WOM) **Cause Marketing**	**Public Event**	A Public Event aims to raise awareness, as a means of stimulating interest and creating publicity. Such events provide to the organizers the opportunities to inform the public about a priority issue, a specific milestone or the entire project. Local individuals and organizations are invited to participate in them. Key characteristics: - Strategic selection of site. - Casual atmosphere. - Allows for sensitive topics to be discussed. Types: -Interactive Event -Pilot Event -Open Event

TABLE LEGEND

TIMEFRAME

It refers to the 4 planning phases of the SUMP cycle as these are presented in 1.1.3:
PHASE 1 = Preparation & Analysis (PA)
PHASE 2 = Strategy development (SD)
PHASE 3 = Measure planning (MP)
PHASE 4 = Implementation and monitoring (IM)

PARTICIPANTS

It refers to the type of participants (Citizens or Stakeholders) during implementation and organization.

COST

For each method we have categorized the cost aspect with the below classification:
€= Low cost
€€= Moderate
€€€=Expensive
€€€€= Very Expensive

Participants		Time Frame					Cost	Method complementarity
Citizens	Stakeholders	Duration	PA	SD	MP	IM		
All citizens Make an exclusive selection of the target audience according to the project's requirements.	Select relevant stakeholders	variable Approx. 1 – 2 months is the most efficient duration for a successful campaign					Offline Campaign €€ Online Campaign €€€ - €€€€	e-Engagement Public event Pilot Interventions Gamification
All citizens Make an exclusive selection of the target audience according to the project's requirements.	Collaborate with an interdisciplinary group of stakeholders	1 day - weekends or weeks					Open Event €€ Pilot Event €€€ Interactive Event €€€€	Raising Awareness Campaign Pilot Interventions Gaming

Marketing Techniques	Participation Method	Definitions / Key Characteristics / Types or Tools
Digital Marketing	**e-Engagement**	e-engagement in the form of Online Campaigning is a similar method to Raising Awareness Campaign, but focuses on web-based channels and digital tools. Key characteristic: -Focus on specific issues while targeting wider audience groups, since e- engagement can take place at anytime and anywhere. -Interesting content presented in different formats Types: -a focus group chat room -a blog or a social media platform -a project website or web/mobile platforms -an online Event
	e-Participation	e-participation has been defined as "the utilization of information and communication technology in order to extend and deepen citizen's participation. Crowdsourcing is an online citizen engagement method, which enables active participation in decision-making or planning processes. This method is basically an open invitation to every citizen, willing to participate in particular issues, by commenting, sharing insights or ideas, via a free-access online platform. Key characteristic - Require ICT competences, legal knowledge and communication skills. - Allows the participation of a larger number of citizens - Gives the opportunity to reach out to wider demographic groups Tools of implementation: - Web platforms - Survey tools - Specialized apps
Dialogue Marketing	**Surveys**	A Survey is a method used for the collection of information or opinions/preferences on a specific topic of interest from a predefined group of respondents. Key characteristics: - Harvest information from representative samples of citizens/ stakeholders. - Ensure that comparable information is obtained, thus enabling the analysis for meaningful statistics. - Support policy making processes as they can ensure data availability for specific purposes. Types: - Users' satisfaction survey - Household surveys/ trip diary surveys - Stated – preference surveys - Roadside Surveys (RSS) - Delphi survey - Measure selection surveys - Measure evaluation surveys Ways of implementation - Postal - SMS - Telephone - Online (digital tools and platforms) - Face to Face interview

Participants		Time Frame					Cost	Method complementarity
Citizens	Stakeholders	Duration	PA	SD	MP	IM		
All citizens Depending on the addressed topic you can target specific groups e.g. residents of local area or parents & children of a specific municipality or region.		variable					Chat Rooms, Blog or Social Media € Online Events €€ Project website or web/mobile platforms €€€€	Raising Awareness Campaign
All citizens Depending on the addressed topic you can target specific groups e.g. residents of local area or parents & children of a specific municipality or region.	Collaborate with key stakeholders For the delivery of the crowdsourcing tool, it is recommended to collaborate with key project stakeholders	variable					Online Survey tools €€ Web platforms Specialized apps €€€ - €€€€	Surveys Gamification
All citizens Depending on the type and purpose of the survey, as well as the issue they address.	Select key stakeholders Depending on the type of the survey. (stakeholder groups, NGOs, local associations, scientific experts, etc)	variable It can be time consuming					Face to Face, Online €€ Telephone, Postal €€€	Public Event Workshop Participatory mapping e-Participation Capacity Building Focus Group Expert Panel Public Consultation Pilot Intervention

Marketing Techniques	Participation Method	Definitions / Key Characteristics / Types
Dialogue Marketing	Public consultation	Public Consultation is a regulatory process that invites citizens and stakeholders to provide their views and feedback on the current stage of the project. Key characteristics: - Experts and government officials share project information and details with the participants. - A limited number of citizens is involved in the decision- making process. The selection of citizens is implemented randomly from the general population. - It is usually the preferred formal type used for final approval of major policies or large-scale infrastructure projects. Types; - Physical meeting - Online meeting
	Focus Group	A Focus group is a structured discussion among a small group of participants, facilitated by a skilled moderator. This method is designed to obtain insights, ideas and opinions from the participants on a specific topic. Key characteristics - It is typically conducted face to face, but it may also be organized via online meetings. - Questions are asked in an interactive group setting where structured discussion among participants is highly encouraged. - Participants are selected based on their knowledge or level of interest to the specific topic. - Neutral and casual environment
	Expert Panel	n Expert panel is a specialized discussion among a variety of experts and active actors of a project. Its objective is to synthesize experts' input from different disciplines on a certain topic and produce a vision or recommendations for future possibilities and needs for the selected topic/ project. Key characteristics: - The experts are selected based on the relevance of their field of expertise. - The discussion is facilitated by a neutral moderator. Types: - Round-table discussions - Online, in a form of a platform discussion

	Participants		Time Frame					Cost	Method complementarity
				SUMP phases					
	Citizens	Stakeholders	Duration	PA	SD	MP	IM		
	12-24 randomly selected citizens. (Adults)	Experts, stakeholders & politicians give input	1 day to 3 weeks					Physical meeting €€€ Online meeting €€	Surveys e-Participation Gaming
	Citizens of all age small group (4-12 people)	All types of stakeholders small group (4-12 people)	2 - 6 hours					€€€	Surveys Gaming
	not designed for citizens participation	Experts from many disciplines	2 - 6 hours					€€	Surveys

Marketing Techniques	Participation Method	Definitions / Key Characteristics / Types or Tools
Relationship Marketing	Workshop	A workshop is an intensive planning session where citizens, stakeholders and experts collaborate on the development of a shared vision It is a face-to-face process, designed to bring people from various sub-groups of society into a consensus by providing adequate information to all participants and the equal opportunity to contribute in co-creating a vision/ proposal. Key characteristics: - It targets situations which require the development of cross-cutting strategies and interdisciplinary collaboration. - Participants can provide ideas and solutions to problems that are outside their areas of expertise. - Project coordinators build partnerships and synergies with the relevant stakeholders and the public. Facilitation Tools: - World Cafe - Participatory Scenarios - Graphic Facilitation - Idea Rating Sheets
	Participatory mapping	Participatory mapping - also called community-based mapping - is a general term used to define a method that combines the tools of modern cartography with participatory approaches in order to represent the spatial knowledge of local communities. Key characteristics: - It represents the agenda of the community by showing information that reflects the community members' aspirations and needs. - Participatory maps are not produced by formal media; a participatory map may be just a sketch or may be incorporated into a sophisticated computer-based GIS (geographic information system). - Embrace diversity in presentation and content as they are not expected to follow conformity guidelines. Types - Participatory mapping using scale maps and images - Participatory 3-D models - Participatory geographic information systems (PGIS) - Multimedia and Internet-based mapping All above types can be implemented as separate methods or as part of a broader participatory process.
The Wheel of Persuasion	Capacity Building	Capacity building is a method that develops further a certain range of skills and competencies of the participants. Key characteristics: - It focuses on building up knowledge. - The participants are selected based on their professional status and relevance to the topic. - It is a repeated process that requires educational/instructional material. Types: - Trainings / Seminars/ Workshops - Conferences - Hackathons - Training material (manual, Handbooks etc)

Participants		Time Frame					Cost	Method complementarity
			SUMP phases					
Citizens	Stakeholders	Duration	PA	SD	MP	IM		
Bring citizens from various sub-groups of society	It is advised to invite stakeholders of all types in order to ensure a holistic perspective of generating opinions	1-3 days					Cost is defined according to the workshop activities, participants and duration	Surveys Gaming Pilot Intervention
All Citizens Narrow the target audience in order to be relevant with the project's requirements.	All types of stakeholders Depending on the subject is recommended to collaborate with key stakeholders in order to access the audience needed according to the project's scope.	variable					Participatory Paper Maps €€ Participatory 3D Models, PGIS €€€€	Survey Gaming Gamification
Selected group of citizens	All types of stakeholders All types of stakeholders can participate, depending on the topic a targeted group of particiants is adviced.	1-5 days					Training materials €€ Training sessions & Hackathons €€€€	Surveys Gaming

Marketing Techniques	Participation Method	Definitions / Key Characteristics / Types or Tools
Guerrilla Marketing	**Pilot Interventions**	Pilot intervention is an approach were physical interventions of a temporary character are implemented on trial base, like a prototype, leading towards a more permanent transformation in the future. Key characteristics: - A harvest of local ideas for local planning challenges. - Short-term commitment and realistic expectations. - Low risk, with a possibly high reward. - Building trust among disparate interested groups and local authorities.
	Gaming	The "Gaming" approach can be described as a chameleon method. This approach masks learning technologies and pedagogical principles in game-based environment with the objective of engaging and motivating participants by offering entertainment and joy. Types: - Simulation based games - Decision besed games - Phsychologigal games Game categories - Location based games - Strategic games
Undercover Marketing	**Gamification**	The "Gamification" method has been broadly defined as the use of game-elements in non-game contexts. It refers to an instructional approach with the aim to increase engagement, motivation and participation. Key characteristics - It provides participants with proactive directives and feedback through game mechanics and game dynamics. - It simplifies learning and makes it more immersive and interactive through active participation and observation. - It is likely to sustain a long-term engagement and thus, effectively influence behavioural change on the certain topic. - It is suitable for engaging heterogeneous groups of individuals with different skills, expertise and interests. - It can address serious topics with a non-formal approach. Principles: - challenges and rewards - competitions - personalization - game levels based on user's experience

	Participants		Time Frame					Cost	Method complementarity
	Citizens	Stakeholders	Duration	PA	SD	MP	IM		
	All citizens	It is recommended to collaborate with key stakeholders in order for the intervetions to have the requested result.	1 week to 3 months				▓	€€	Raising Awareness Campaign Survey Public Event Workshop
	All Citizens Target specific groups according to the subject .	All types of stakeholders All types of stakeholders can participate, depending on the topic a targeted group of particiants is adviced.	variable	▓	▓	▓	▓	Strategic Games €€ Location based games €€€€	Public Event Workshop Focus Group Capacity Building Participatory Mapping
	All Citizens Depending on the addressed topic you can target specific groups i.e. residents, children, cyclists, etc.	It is recommended to collaborate with key stakeholders in order to access the audience needed according to the project's scope.	variable	▓	▓	▓	▓	€€€ - €€€€	Raising Awareness Campaign e-Participation Participatory Mapping

Time Frame — SUMP phases

Marketing Techniques	Participation Method	Definitions / Key Characteristics / Types or Tools
Undercover Marketing	**Ambassador campaign**	The "Ambassador Campaign" method is a form of indirect promotion by collaborating with important public figures (celebrities, opinion-leaders, influencers). Key characteristics: - It generates Word of Mouth communication. - It leverages the Ambassador's popularity and reputation.
	Popular Events	The "Popular Event" method is an indirect form of promotion where the popularity of a current event is capitalized in order to gather attention for an additional issue. The term "popular" refers to all types of events and happenings that are well established and known to the public. From major sports events and games to cultural events and festivals. Key characteristics - Utilization of well-established events and happenings. - Effective tool to achieve high exposure with minimum cost implementation.

	Participants		Time Frame					Cost	Method complementarity
	Citizens	Stakeholders	Duration	SUMP phases					
				PA	SD	MP	IM		
	All citizens		variable					€ - €€€€	
	All citizens		1 day - days					€€	Raising Awareness Campaign

3.2 Method Complementarity

Most of the methods can work as stand-alone exercises but when combined with others they provide better results and more extended participants' outreach. The diagram below indicates a number of possible interconnections that can happen between all engagement methods. The coloured boxes highlight the methods that can work as complementary tools to others and the dotted coloured lines connect them to all associated methods.
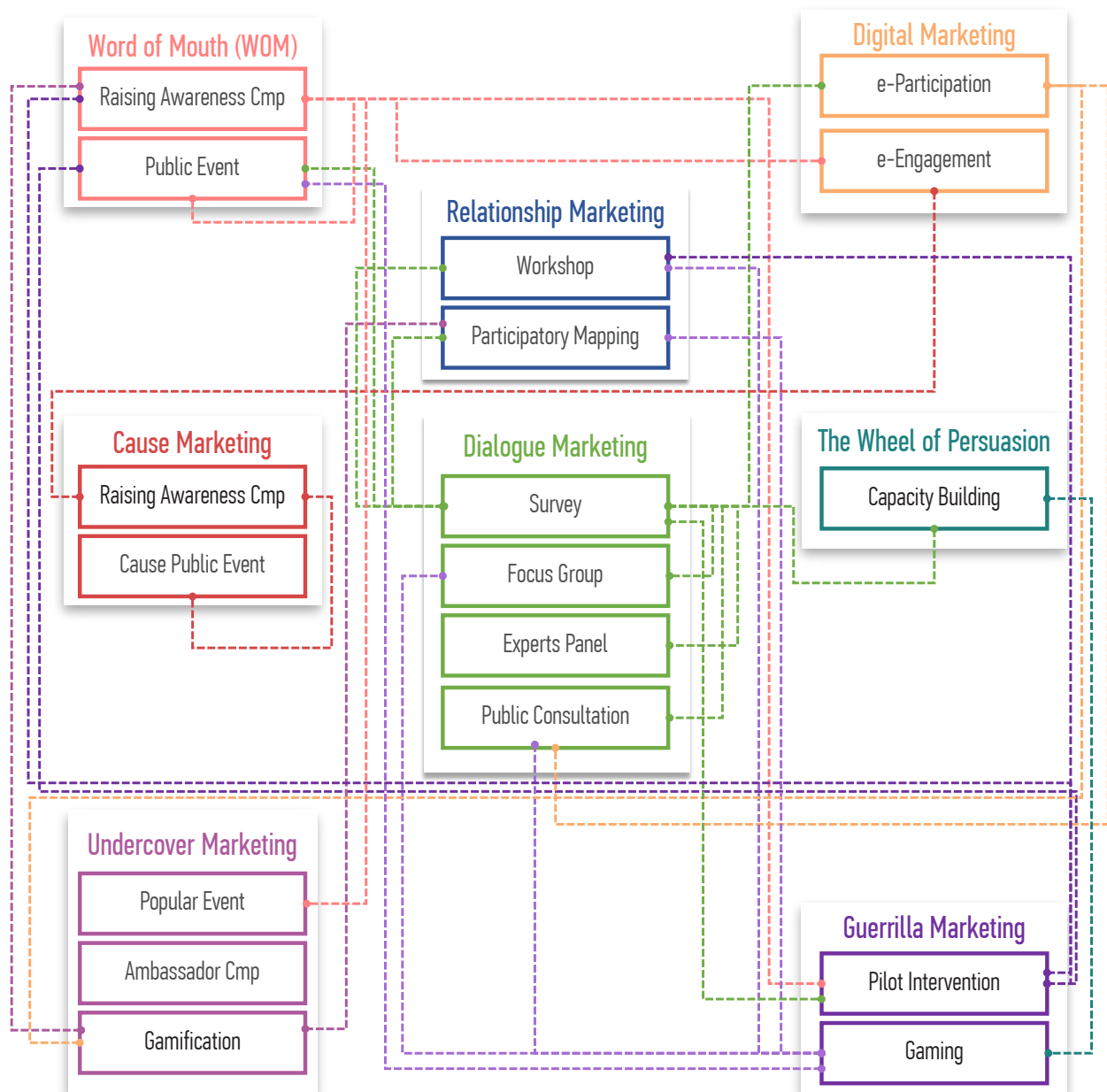
Diagram of method complementarity - the dotted coloured lines connect all methods that can work as complementary tools to others.

An indicative example that illustrates the complementarity of Marketing Techniques and Engagement Methods is the Rome's SUMP participatory approach (see page on the left). The process had been coordinated by a public body, Rome Mobility Agency and supported by Risorse per Roma (public organization) and the Municipality of Rome. This project introduced an innovative public participation approach by combining several relationship and dialogue marketing techniques through digital and physical engagement. The entire participatory process was tied with a strong and cohesive communication strategy which utilized all Word of Mouth channels.

Best Practice

Rome's SUMP participatory approach[1]

Rome, Italy

September 2017 — August 2019

Municipal boroughs, Association of traders, Local Authority, Association of traders, Cyclist associations, Road victims association
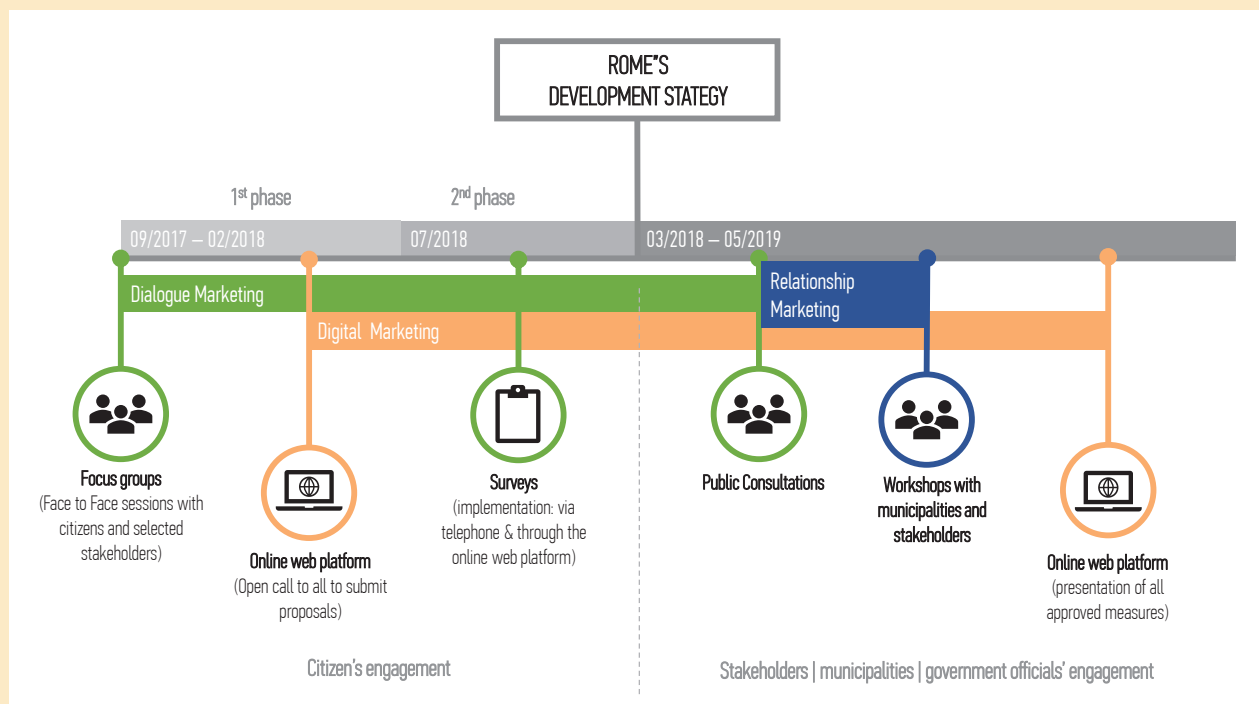
Rome's SUMP was generated through an intense multilevel participatory methodology.

The SUMP introduced a new participation approach, involving the citizenship through a specific open portal to allow the knowledge and voting of the sustainable proposals.

At the same time, public meetings in City District took place and interviews and analysis (published on the Portal) was carried out to look into the topics regarding sustainable mobility.

Objective:
to introduce a new participation approach, involving the citizenship and stakeholders in sustainable urban mobility planning

Results:
For the first time in Rome citizens were able to express their opinion on clear topics regarding infrastructural adjustments.

Citizens' Engagement

1st Phase results:

- 4.106 Received proposals [2.668 were published]
- 3.132 Comments were made
- 43.651 Contacts
- 28,123 Votes were cast
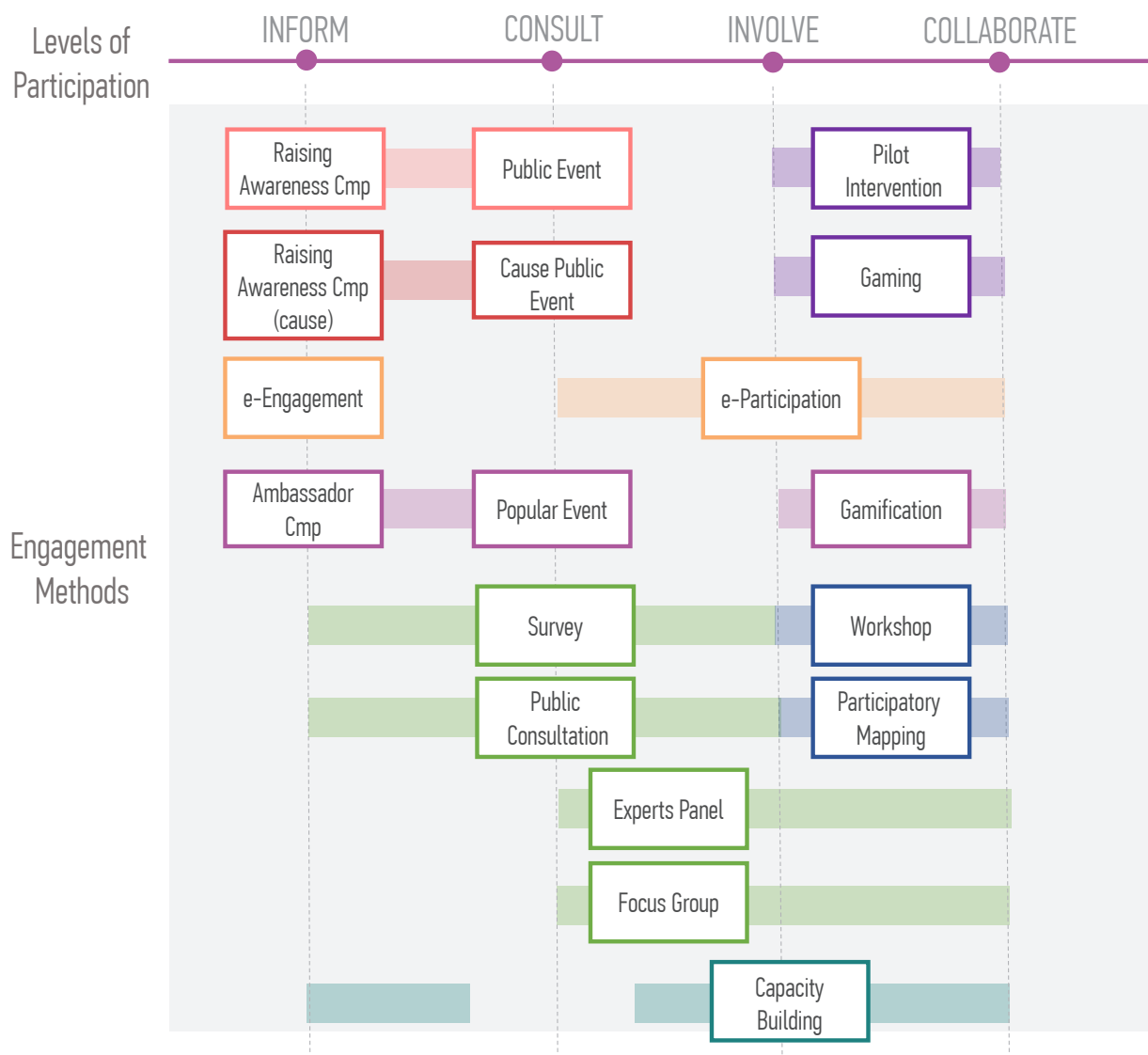
2nd Phase results of listening procedure:

- 2000 Romans were reached via phone surveys
- 5415 web users

Stakeholders | municipalities | government officials' engagement

- 18 Meetings were implemented in total
- 546 Participants

3.3 Level of Participation

The table below illustrates an indicative categorization of each engagement method in the four levels of participation. The spectrum of participation is a modification adjusted to the needs of modility planning based on the spectrum of public participation developed by the International Association of Public Participation.

Spectrum of public participitation -Categorization of all engagement methods to the four levels of participation

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Glossary*

Citizen	A citizen is a legally-recognised subject of a nation, region or municipality. More generally the term is used to refer to an inhabitant of a particular town or city.
Complementarity	Complementarity refers to a beneficial situation where the implementation of two measures results in greater total benefits than the implementation of either measure on its own:
Key stakeholders	Key stakeholders are individuals or organisations having political, regulatory, functional or financial powers as well as relevant competencies.
Measure	Refers to a policy, campaign or project that is implemented to contribute to the achievement of the SUMP's objectives and targets.
Method	Procedure selected to approach a research or planning task.
	The term method is used to distinguish between alternative approaches that can be applied at certain stages of the planning process.
Policy	Policy refers to a coherent set of ideas, proposals and measures addressing a particular situation or problem of a group of people, a business organisation, a government or a political party.
Project	Planned action or initiative that have specific aims and targets.
	The term is used to as a generic reference to all actions or initiatives that can be implemented during a SUMP process planning .
Strategy	A plan of action, comprising a combination of measures, designed to meet specified objectives. The selected measures should reinforce one another in meeting the objectives and overcoming barriers
SUMP	A Sustainable Urban Mobility Plan is a strategic plan designed to satisfy the mobility needs of people and businesses in cities and their surroundings for a better quality of life.
Techniques	Procedure selected to approach a research or planning task.
	The term method is used to distinguish between alternative approaches that can be applied at certain stages of the planning process. Sustainable Urban Mobility Plan
Tools	In the context of SUMP preparation, tools are a series of work practices or processes that can be utilised by planning authorities.

*Source:
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2. Eltis Glossary

We care for each other,
we care for our space,
we become part
of mobility planning