segmented marketing for energy efficient transport

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SEGMENT is a 3 year project which tested the use of Market Segmentation in persuading people to change their travel behaviour and adopt more energy efficient forms of transport. SEGMENT focused on the use of ‘life change’ moments which forced consumers to question their travel habits and consider alternatives.

Life-change moments such as moving house, starting a new job or a new school can influence a person’s travel choices

In total, seven partner cities participated in the project; Almada (Portugal), Athens (Greece), Gdynia (Poland), Hounslow (London, United Kingdom), Munich (Germany), Sofia (Bulgaria) and Utrecht (Netherlands). The seven cities tested the segmentation model through the development and implementation of marketing campaigns. Later Athens changed their status in the project from ‘partner city’ to ‘active observer’. University of Aberdeen in Scotland acted as Expert Partner and was responsible for developing the project methodology as well as assessing the results.

We encourage other cities to adopt the SEGMENT approach. The act of thinking about target groups will itself make a difference to the way in which mobility management campaigns are designed and implemented.

SEGMENT has shown there are two main benefits to adopting attitudinal segmentation. Firstly, the process of thinking about the composition of the target audience for each intervention leads to useful and creative ideas about how to design campaigns.

Secondly, the evaluation of SEGMENT has shown that in some cases, certain segments responded better to the sustainable transport messages and that the adoption of sustainable modes, particularly walking, was often greater in these groups.

Hounslow acted as Lead Partner and EPOMM was responsible for dissemination activities across Europe.
Social marketing is an approach used to develop activities aimed at changing or maintaining people’s behavior. Where marketing in the commercial world seeks to influence consumer behavior for profit, social marketing encourages behaviours that benefit individuals and society as a whole.

*Instead of treating humankind as one homogenous group and trying to find the perfect model for the whole population, this approach focuses on identifying subgroups that have experienced a comparable set of events.*

This project sought to maximise the impact of the campaigns through the use of two segmentation techniques:

- Targeting consumers undergoing ‘life change moments’ which causes them to question and reconsider their travel habits.
- Clustering these consumers (using detailed questionnaires) into relatively homogenous groups (in terms of their attitudes towards car use, cycling, electric vehicles or wider issues such as climate change and health etc.) and then devising bespoke campaigns.

**SEGMENT objectives:**

- Development of a transferable market segmentation model for targeted marketing campaigns and their monitoring.
- Implementation of successful targeted marketing campaigns in partner cities, leading to a change in public attitudes and behaviour towards sustainable transport modes.
- Building competence and capacity to increase and accelerate the take up and transfer of best practice in Europe for travel marketing campaigns.
Research shows that most mode-of-travel decisions are made through ‘habit’, leading individuals to be resistant to campaigns to change engrained behaviour. Targeting consumers undergoing ‘life events’ forces them to question their travel behaviour.

Each city developed and implemented their own campaigns based on their chosen target group. It was agreed early in the project that all cities were to target primary schools as a segment group. In addition to this, partner cities could choose 2 other target groups of their choice. (See Table on next page)

The different mobility cultures as well as the different political and budgetary situation in the cities play an important role in designing the campaigns. Due to these different conditions and the different experiences and history of marketing for energy efficient mobility in each partner city there are three different scenarios of campaign design possible:

Scenario 1: new campaigns
Scenario 2: new elements for already existing campaigns
Scenario 3: smarten up existing materials and campaigns with new messages

Clustering groups of residents into relatively homogenous groups (in terms of their attitudes towards car use, cycling, electric vehicles or wider issues such as climate change and health etc) and then devising bespoke campaigns to target specific values or attitudes increases the likelihood of initiatives being successful and more cost effective.

With the support of the external marketing expert Steer Davies Gleave SDG and the University of Aberdeen it was the task of the city partners to select the most promising segments within their different target groups and to design marketing campaigns for them.
18 SEGMENTed marketing campaigns - more details available on [http://www.eltis.org/](http://www.eltis.org/)

**HOUNSLOW**
1. Encouraging London Borough of Hounslow staff to travel to Hounslow Civic Centre by sustainable modes.
2. Increasing walking and cycling levels amongst residents who visit health care facilities.
3. My Time: motivating Year 1 parents to walk their children to school.

**ALMADA**
1. Encouraging first year university students to travel to school by public transport through personalized travel plans.
2. Increasing cycling to school amongst 1st level primary schools children and parents using fun game materials.
3. Improve the use of public transport amongst new residents, by providing them with a transport and mobility welcome kit full of information and free public transport tickets.

**SOFIA**
1. Encourage new employees in the private and public sectors in the Lozenets districts to travel to work more sustainably.
2. Inspire new residents to walk, cycle or use public transport rather than driving private cars.
3. Encourage parents of new pupils to take their children to school by walking or using public transport rather than driving private cars.
UTRECHT
1. Create awareness amongst new employees for smarter ways to commute, such as cycling or use of electric bikes.
2. Create awareness amongst new residents for smart alternatives to the use of a private car: such as car sharing, public transport, cycling or electric bicycle, and reinforce any existing sustainable behaviour of new residents.
3. Encourage parents of children starting primary school to bring their children to school by bike or foot.

GDYNIA
1. Encourage new employees to cycle to work or use public transport.
2. Encourage new parents to walk to the health centre with their children.
3. Encourage parents to walk their children to and from school more often, and change parents’ perception of car as a status symbol.

MUNICH
1. To enable and encourage new foreign residents to a sustainable mobility behaviour.
2. To establish a sustainable, multimodal and energy efficient mobility culture in Munich, amongst new residents.
3. To sustain the high level of sustainable travel for journeys to school, and to get pupils used to sustainable transport modes as part of a modern lifestyle.
For each of the campaigns undertaken in each of the six partner cities, a ‘before’ and ‘after’ survey was undertaken. This consisted of questionnaires collecting identical data on travel behaviour and attitudes to travel. The first surveys (‘the baseline’) were undertaken in late 2010/11 and the second wave in late 2012/13.

Survey results show that the same attitudinal segments exist in different European cities but in different proportions.

The segments are distinguished by their attachment to the car, self-identification with alternative travel modes and motivations for fitness and environmental protection. Identifying these segments has been a worthwhile process for the transport planning teams in the Partner Cities and it has highlighted the importance of understanding individual barriers and opportunities to change travel behaviour, many of which were not considered before SEGMENT.

There were some general lessons learnt:

- The content of the questionnaire should be written so that it is transferable across contexts, cities, countries, languages etc. In SEGMENT we used one identical questionnaire which was only adapted where necessary to account for the differences between target groups. Each partner city then had their own space on the questionnaire to ask any bespoke questions if they wanted to.

- The data needs to be returned to the data analyst in a standard format in order to avoid a lengthy process of cleaning the data. Excel spreadsheets were given to each partner city which they needed to fill in with the results using a standard coding frame.

- Segmentation requires some complex multivariate statistics. It is possible that survey companies would be able to be contracted to undertake such analysis, but very large sample sizes are needed and this is a complex task. This is the reason for producing the Golden Questions calculator tool to simplify the process. (See Page 20)
During the campaign design phase, all project partners learned much about the segmented approach and the change from their usual marketing of mobility management as well as to other qualitative approaches like focus groups.

Everybody also got a better feeling for the target group he or she wanted to reach and the challenge of finding the “right messages”.

Example 1 UTRECHT—NEW RESIDENTS

Purpose of the marketing brief
With this marketing brief the City of Utrecht asked three marketing agencies to develop a proposal for a campaign. The City of Utrecht chose one of the proposals based on a set of previously released criteria.

Campaign period
The campaign was to take place in the period January –June 2012.

Strategy
Focus on 2 segments within the target group new residents: the practical peddlers and the aspiring environmentalists because:

- The peddlers (33%) and environmentalists (21%) add up to 55%.
- Both segments bike a lot already. Car use for the peddler is going up and they wanted to stop this trend.
- Both segments are – for different reasons - open for alternatives like car sharing or e-bikes. Peddlers because they might be practical, Environmentalists because they think they can make a difference.

Create awareness amongst new residents for smart alternatives for the use of a private car: car sharing, public transport, and/or e-bike
Approach and Methodology - Campaign Design & Implementation

Example 1 UTRECHT—NEW RESIDENTS contd

The campaign focuses on reinforcing good (cycling) behaviour on the one hand and experiments with new means of transport on the other.

*Reinforce existing sustainable behaviour of new residents*

**Key messages:**

*For the Peddlers:*
- You're smart! (Slim bezig!)
- There are more smarter ways to move than you think.

*For the Environmentalists:*
- You make the difference in making Utrecht a better place to live, work, travel.

**What are the requirements for implementation?**

*For the Peddlers:*
Facts & figures, Practical messages & gadgets (travel info, apps, sms-alerts). This segment is allergic to ideological messages concerning mobility, climate change.

*For the Environmentalists:*
Facts & figures about the benefits of cycling for the environment and mobility in Utrecht.

For both segments:
Test facilities for e-bikes, public transport bikes, car sharing

**What channels were used?**

A mixture of existing media like: The 'welcome to Utrecht' gift; website www.utrecht.nl; Personal letter/ e-mail; free publicity

And new media like: social media; apps; maps; Reverse graffiti on cycle lanes; Utrecht style give-aways in connection with cycling (Nijntje on a bike?)
Leaflet with cycling map of Utrecht on the reverse side. The cycling map contained addresses (shops, restaurants, activities) where new residents can receive discounts if they come by bike.
Example 1 UTRECHT—NEW RESIDENTS contd

- New residents and existing residents who moved within the city received a welcome pack a few weeks after moving. The welcome pack contains a letter of the deputy mayor and a specially developed cycling map of Utrecht.

- The cycling map contained addresses (shops, restaurants, activities) where new residents can receive discounts if they come by bike. The addresses were chosen based on the preferences stated in the profiles of our chosen segments. The reverse side of the map contained all kinds of facts and figures about Utrecht sustainable mobility.

- They developed the www.utrechtfietsstad.nl website, containing information on sustainable transport, plus an opportunity to download vouchers to be able to receive discount at the addresses on the map. Downloading vouchers automatically meant entering a prize draw for an e-bike.

- Issues – Continuity: it is necessary to keep the discount options updated. This is time intensive. Access to residential databases: this is necessary for this type of personalized marketing, but not available in every country.

A modal shift of 4% from car to cycling and PT has been measured after implementing this campaign amongst the target audience. This shows that even when bicycle mode shares are high, even in the target segments, improvements are possible.

A success factor was having access to the municipal residents database and having an obligation to register when moving: this makes it possible to contact all new residents directly after moving.

Also successful was the involvement of companies: almost every company approached for offering discounts said “yes”. This shows that new residents campaigns offer opportunities for commercial exploitation: new residents are potential new clients, so companies might be interested to structurally join in such campaigns. Utrecht will explore this option, to reduce costs and time consumption when continuing this project.

Also Utrecht will consider offering packages aimed at other segments. And a challenge to increase the effect is to get in contact with people considering to move to Utrecht. It might be very effective if they “know” Utrecht is a cycling city before they buy/rent their new house.

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Approach and Methodology - Campaign Design & Implementation

Example 2 GDYNIA—NEW EMPLOYEES

Segments for the marketing brief

- Status seekers
- Reluctant pragmatists
- Car Contemplators

“*I cycle to work, and you?* (“*Do pracy jadę rowerem, a Ty?*”)”

Aims:

*Status seeker and reluctant pragmatists*: Encourage new employees to cycle to work

*Car Contemplators*: Encourage new employees to keep on using Public Transport, not buy a car—cars should not be perceived as a status symbol.

About the segments

*Status seeker*: Works full time; Travels by car mostly; Likes driving just for the fun of it; Thinks public transport is not for successful people; Thinks public transport is expensive; Cares about environmental issues; Would cycle to be fit; Has the will to cycle more (but not to work); Feels cycling is too difficult; Feels cycling is not safe.

*Reluctant pragmatist*: Works full time; Already uses public transport (sometimes); Not convinced about environmental issues; Would cycle to express themselves; Have the will to cycle more; Feels guilty about driving a car too often.

*Car Contemplator*: Works full time; Already uses public transport a lot; Likes public transport generally because has no alternative; Feels worse than people who have a car—less mobile, dependent; Would like Public Transport to be less stressful, have priority on roads, cheaper, less crowded and would like to have more information about bus services; Not convinced about environmental issues; Very negative about cycling and walking.
Example 2 GDYNIA—NEW EMPLOYEES contd

Key messages:

Status seeker, reluctant pragmatist:
- Express yourself on bicycle
- You don’t have to be very fit to start to cycle
- Cycling is trendy and fun

Car contemplators:
- Car is not a measure of success
- Public transport gives independence

The campaign for car using segments was implemented in 7 companies and it included:
- Cycling Competition for new employees (Apr-Jul 2012) - 3 overall winners were able to choose their own prize (i.e. new bicycle, bike accessories). Smaller rewards - snacks and cinema tickets for two were given for regular cycling.

It was preceded by promotional posters.
- Company bicycles for 5 companies (got 2 bicycles each)
- Free bicycle service
- ‘Positive Bicycles’ (Apr-May 2012) - 20 bicycles with positive catchy and rhyming messages were parked outside companies
- ‘Decorated Bicycles’ (Jul-Aug 2012) - ‘Positive Bicycles’ were beautifully decorated to show that bicycles are more attractive than cars

Approx. cost: 27 400,00€

For non car users, certificates with the slogan “Forget about a car, now a bus/trolleybus/rapid railway is in vogue” were given as a kind of reward and symbol of appreciation for using the public transport.
Additional to this, vouchers for STARBUCKS café for new employees who have a monthly ticket for public transport were provided.
 Approx. cost: 5 000,00€
Example 2 GDYNIA—NEW EMPLOYEES contd

Campaigns involved small groups of representatives of chosen segments, and they have shown that they are really interested in such actions.

Participants of cycling campaign realized that a bicycle is more attractive than a car.

One problem when introducing the campaign - ‘old employees’ also wanted to take part in the campaign and felt discriminated.

The success of the campaign, especially the Cycling Competition, resulted in continuing as a local initiative in 2013.

See also article in eg magazine on this and other campaigns:

Results of campaign for Status Seekers and Reluctant Pragmatists:

- 220 people participated.
- car driving decreased by 12%, cycling increased by 3% and walking by 1%.
- surprisingly, public transport use increased by 6%.

This led to annual CO2 savings of 14.9 tonnes (detailed results are depicted in the MaxEva database of EPOMM)

Car Contemplators

The campaign for Car Contemplators carried out in Gdynia was very well received by the participants. The reward turned out to be a very nice surprise for them. It also made them realize that their transport behaviour is an example of good and worthy imitable practice and that they should not feel inferior to car users because of using public transport.

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Results - Overview

For each of the campaigns undertaken in each of the six partner cities, a ‘before’ and ‘after’ survey was undertaken. This consisted of questionnaires collecting identical data on travel behaviour and attitudes to travel. The first surveys (‘the baseline’) were undertaken in late 2010/11 and the second wave in late 2012/13.

In the second wave, data was collected from groups of people who had been exposed to the campaign (‘the treated group’), but also from people in the same or similar institutions, schools or neighbourhoods which had not been exposed to the campaign (‘the control group’). The purpose of the control was to represent the background trend and what would likely have happened anyway without the SEGMENT campaigns.

One way in which ‘success’ can be evaluated from the SEGMENT project is to look at the change in mode share in each of the attitudinal groupings in each target group and city separately. By doing this, we see whether the attitudinal segmentation was successful at achieving a greater amount of modal shift in those segments which were targeted through the campaigns.

The SEGMENT survey results show that the same attitudinal segments exist in different European cities but in different proportions. These segments are distinguished by their attachment to the car, self-identification with alternative travel modes and motivations for fitness and environmental protection. Identifying these segments has been a worthwhile process for the transport planning teams in the Partner Cities and it has highlighted the importance of understanding individual barriers and opportunities to change travel behaviour, many of which were not considered before SEGMENT.

The analysis suggests that campaigns targeted at life-change moments can be successful.
SEGMENT attempted a scientifically robust and thorough method of evaluating its ‘double segmentation’ approach. It assessed the impact of the campaigns on each life-change target group and then divided these groups further to assess the impact on even smaller attitudinal sub-groups in the population. This was extremely ambitious and the evaluation process was challenging.

For instance, the relatively small target groups in most cities meant that the results were often not statistically significant. In addition, it can be very difficult to find comparable ‘control groups’ and this lack of comparability will impact the outcome of the results often making the impact in the treated group look smaller than it was. In addition, people can take a while to respond to travel behaviour interventions including campaigns and it is possible that some mode shift may have occurred after the evaluation surveys were undertaken for some of the campaigns (such as in the next school year, for example).

Nevertheless, various aspects of the segmentation approach have proven to be effective and to have provided both a useful creative experience for the partner cities and to have proven to be effective in achieving a level or direction of behaviour change that may not have been achieved with more blanket campaigns.

Example: For Almada in Portugal, segmented marketing is a very new area where there is very little expertise. The SEGMENT project provided a good test-base to see how this approach to developing campaigns measures up against the one-size fits all approach.

Schools Campaign: Almada started out with 12 Schools – 440 first year pupils - and conducted a survey to find out the attitudes of their parents. This led to the segmentation shown below. Overall, after the campaign, it appears that Almada has achieved modal shift from unsustainable modes to sustainable ones within the schools target group. Although the campaign was to promote cycling in schools it appears walking achieved a better result.

Cycling infrastructure was not improved during the campaign period and this may have manifested into an increase in walking.
Conclusions - Transferability

**HOW CAN THE PROCESS BE SIMPLIFIED?**

We explored how SEGMENT can be best transferred and how the process can be simplified in order to make it easier and more cost-effective for other cities. The report takes the format of a series of key questions to enable the key learning outcomes from SEGMENT to be understood and applied elsewhere.

Some of the questions are set out in the following pages:

*Question 2: Should ‘life change moments’ be targeted?*

The conclusion from SEGMENT is that targeting life change moments works best where mobility management campaigns have a reasonably long history and incentivising reduced car use is not a new concept in a location.

Where mobility management is a new concept (such as Gdynia and Sofia in SEGMENT), the targeting of incentives to niche groups such as new employees built resentment from those individuals not undergoing the life change moment.

On the other hand, Munich and Utrecht could see the benefit of using a life change moment as a new ‘way in’ for campaigns which were beginning to reach saturation in the general population. Therefore, targeting life change moments does need to be carefully managed for certain groups.

A way to avoid hard feelings could be to offer the entire target group an incentive and thereafter, only offer it to the ‘life change moment’ group. For example, where a residents campaign is being introduced, initially the offer should be to all residents within a development and then after this, to new residents only.

*Key learning outcomes can be applied elsewhere*
Conclusions - Transferability

**Question 3: Are attitudinal market segments the same in different Member States?**

Much analytical effort was expended in SEGMENT to understand the composition of attitude segments in each partner city. This used a set of multi-variate statistical techniques to extract segments and compare their statistical viability across locations. The strong conclusion was that most of the segments can be detected in all locations – it is the proportion in which they are represented that differs.

In SEGMENT, eight final segments were detected.

One segment in particular is not well represented in all the cities – Practical Travellers. This is a segment which dominated in Utrecht and was strongly represented in Munich and is related to the particular infrastructure provision and culture of cycling in the two cities. On the other hand, the PT Dependents and Malcontented Motorists are not really represented in Utrecht.

Other such patterns can be detected for other segments and can largely be explained by the composition of the transport infrastructure in each location and the social norms that prevail there at the time of the survey.

Most segments are represented in most locations but it can be equally revealing to find out which segments are not represented. We recommend that the transferable lessons regarding data collection and Golden Questions are followed and this will test the degree to which each of these eight segments is present in any dataset.
Conclusions - Recommendations

**Question 4: How much data is required and what are the best methods of collecting it?**

The amount of data that needs to be collected depends on (i) the amount of existing data that is already available (ii) whether or not the SEGMENT Golden Questions Tool will be used or a new statistical segmentation will be undertaken (iii) resources available.

Municipalities may routinely undertake travel surveys, for example. This data is essential in any case to inform mobility management policy, but can also include some attitudinal data (e.g. levels of satisfaction or levels of service) which can be used to segment the population. It can also help to identify particularly problematic journey purposes such as commuting or the journey to school.

However, this data is usually limited in helping to identify different motivational groupings and to do this, extra data is often needed.

It is clear from SEGMENT that it is not enough to base targeted messages on sociodemographic qualities alone (age, employment status, number of children etc) as some other data about attitudes and motivations is required.

SEGMENT has generated a Golden Questions segmentation tool which limits the number of questions needed to be used in any new survey. It also means that the survey can consist of as little as one person to be put through the calculator to generate their segment membership.

However, if it is decided that the segments found in SEGMENT do not provide sufficient information required for a campaign or it is suspected that other motivations may exist that are important, a new questionnaire survey will need to be administered. The size of this survey (i.e the number of completed surveys that will be required) will depend on the size and geographical diversity of the target group. The greater the geographical diversity, the larger the sample needs to be to be able to understand the impact that this diversity may have on the composition of the segments. It also has to be remembered that when new statistical segmentation is being undertaken, the sample size needs to be around a minimum of 500 people in order to be able to say something meaningful about each segment once the sample is divided this way.
Conclusions - Recommendations

Question 6: Which segments should be selected for a campaign or can the same techniques be used to address all the segments?

The purpose of segmentation is to produce a rich understanding to know how to target each group of people differently in order to have the best chance in influencing their behaviour. Also, as pointed out above, the exercise is likely to identify certain groups which are unlikely to change behaviour under all but the most draconian of policy measures. Therefore, in order to optimize resource allocation, only a few segments should be chosen to inform the design of the incentives, initiatives and messages of the campaign.

Overall it makes sense to focus on those segments who are ‘ready and willing’ to change. However, the exact choice of which segments to choose depends on the current state of the transport infrastructure and the ‘hard’ infrastructure and service improvements that are being introduced. For instance, Active Aspirers segment are likely to be undertaking as much walking and cycling as they feel able to do and require new infrastructure to be encouraged to do more of this. So, if a campaign does not involve the improvement of this infrastructure, it may not be worth targeting this group.

A campaign can focus on only one segment or a few segments if the initiatives are likely to be attractive to more than one group. However, every opportunity should be taken to use communication messages which appeal to each group individually.

Another consideration is the size of the segments in each location. It is unlikely to be a good use of resources to target a very small segment of the population (<5%) unless there is a very clear way of finding and targeting this group.

It is also a very important learning point from SEGMENT that the messages and initiatives are very different from city to city even when the same segments are chosen. The campaigns need to be tailored to the current transport environment and social norms of any given location.
Conclusions - SEGMENT TOOLKIT

The SEGMENT Toolkit has been created to bring together examples of best practice from the SEGMENT project, to help other organisations across the EU to implement successful sustainable transport programmes.

The SEGMENT Toolkit will give you the information and resources you need to understand your target audience and determine the messages most likely to motivate them to change their travel behaviour.

It provides practical lessons in using consumer market segmentation techniques to improve your travel management campaign.

In this toolkit, you will find:

- a social marketing checklist you can use to review existing campaigns
- a guide on identifying your audience
- Pen profiles of the eight key consumer segments and their Mosaic equivalents
- “Golden questions” to help with customer profiling and a helpful online survey tool (the segmentation quiz)
- Case studies from campaigns in Europe
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