

HOV MARKETING MANUAL

"MARKETING FOR SUCCESS"

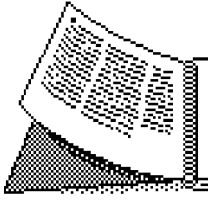
**By
John W. Billheimer
J.B. Moore
Heidi Stamm**

**Submitted to
The Federal Highway Administration**

**By
SYSTAN, Inc.
343 Second Street
P.O. Box U
Los Altos, CA 94023
(415) 941-3311**

**In Association With
The Roanoke Company
Pacific Rim Resources**

**D265
April, 1994**

| | |
|---|---|
| <p>PREFACE AND ACKNOWLEDGEMENTS</p> | <p>PREFACE</p> |
| <p>This manual has been prepared by SYSTAN, Inc. for the Federal Highway Administration to provide marketing and HOV professionals with practical guidelines for improving the public awareness, understanding, acceptance and use of HOV lanes.</p> |  |

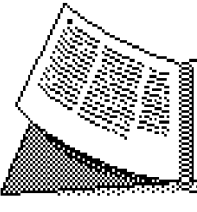
The manual has been prepared in the Los Altos, California offices of SYSTAN, Inc. under Contract No. DTFH61-93-C-00090 with the Federal Highway Administration (FHWA). Mr. Jerry Emerson of FHWA acted as the project's technical monitor.

SYSTAN's project manager and principal investigator was Dr. John W. Billheimer. Mr. J.B. Moore of The Roanoke Company provided public information insights and wrote major sections on Campaign Implementation, while Ms. Heidi Stamm of Pacific Rim Resources contributed her hands-on experience with HOV lane marketing and authored the subsection dealing with Constituency Building and the Case Study of Seattle's I-5 South HOV lanes. Ms. Juliet McNally of SYSTAN helped to organize the final report, and Ms. Fran Vella of Phrasemaker Word Processing prepared all project reports, including this Manual.

The manual has been prepared under the close scrutiny of the Transportation Research Board's Committee on HOV Lanes. Committee members and friends Charles Fuhs, Ron Klusza, Heidi Stamm, Katie Turnbull, and Carole Valentine liberally contributed their time in reviewing the manual outline and each of its drafts and made many helpful suggestions as the work progressed.

The authors received generous assistance from a number of individuals affiliated with various HOV projects throughout the U.S. Special acknowledgement is due to Al Pint and Judith Rockvam of MN DOT and Charleen Zimmer of Strgar-Roscoe-Fausch, Inc. for their assistance with Minneapolis I-394; to Lynda South Webster and Frank Dunn of VDOT for their help with both Hampton Roads Projects; to Ron Klusza and Bob Goodell of CALTRANS District 7 for dredging up their memories of Santa Monica Diamond Lanes; to M. Scott MacCalden Jr. of JHK Associates for unearthing the early technical reports on the San Francisco/Oakland Bay Bridge; to Mary Ann Reynolds and Carole Valentine of VDOT for reliving their experience with the Dulles Toll Road; and to Jerry Ayres, Melissa Loomis and Rob Fellows of WA DOT for sharing their insights into Washington State HOV policies and programs.

SYSTAN wishes to thank all of those who provided information and insights on the marketing of HOV lanes, and acknowledges full responsibility for the analysis, interpretation, and presentation of the information they provided.

| | |
|--|---|
| FOREWORD  | FOREWORD This report has been organized in a modular format, with each subsection preceded by a <u>topic sentence</u> in bold type and illustrated with an exhibit on the facing page. |
|--|---|

This report has been organized in four major chapters.

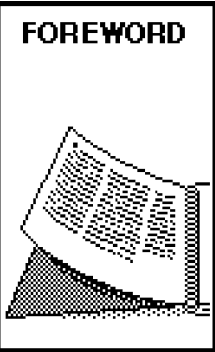
1. Introduction
2. Planning the Campaign
3. Implementing the Campaign
4. Monitoring and Evaluating

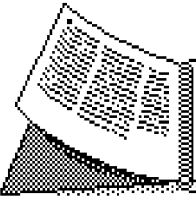
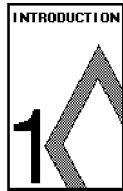
The four chapters are further divided into Sections (designated by letters) and Subsections (designated by numbers). Each Subsection has been designed as a self-contained, modular element, with a single page of text facing an exhibit illustrating the thesis of the Subsection. The layout of each modular Subsection is sketched in the illustration on the facing page.

For the convenience of the reader, the Chapter Number and Section and Subsection designation are prominently displayed at the top of each page. In addition, a topic sentence summarizing the Subsection thesis appears in bold type at the beginning of each modular element (See exhibit). The reader interested in a quick overview of the report can easily skim its contents by reading these topic sentences, pausing to explore subjects of particular interest.

FOREWORD

EXPIGAL: SUBSECTION LAYOUT



| | |
|---|---|
| CONTENTS | TABLE OF CONTENTS |
|  | INTRODUCTION  |

SECTION I - INTRODUCTION

PAGE

A. OVERVIEW

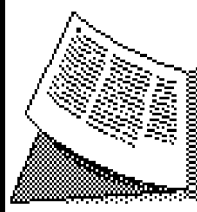
1-2

B. CASE STUDY HIGHLIGHTS

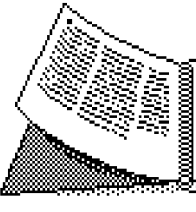

| | |
|---|------|
| 1. Overview | 1-4 |
| 2. Minneapolis I-394 | 1-6 |
| 3. Hampton Roads Route 44 | 1-8 |
| 4. Hampton Roads I-64 and Route 44 (Phase II) | 1-10 |
| 5. The Santa Monica Diamond Lanes | 1-12 |
| 6. The San Francisco-Oakland Bay Bridge | 1-14 |
| 7. The Dulles Toll Road | 1-16 |
| 8. Seattle I-5 South | 1-18 |

C. MARKETING FOR SUCCESS


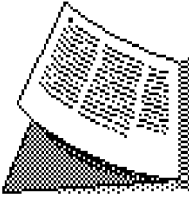
| | |
|------------------------------------|------|
| 1. Start Early and Keep Going | 1-20 |
| 2. Build Constituencies | 1-22 |
| 3. Refine the Product | 1-24 |
| 4. Respect the Single Auto Vehicle | 1-26 |
| 5. Develop a Marketing Plan | 1-28 |
| 6. Monitor and Evaluate | 1-30 |

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|-----------------|-----|-----|-----|-----|-----|-----|--|--|--|--|--|--|---|--|---|---|--|--|--|--|--|----|----|--|--|--|--|---|
| TABLE OF CONTENTS | CONTENTS | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 5px; margin-right: 10px;"> <p style="font-size: 8px; margin: 0;">PLANNING</p> <table border="1" style="font-size: 8px; border-collapse: collapse;"> <tr> <td style="width: 20px;">SUN</td> <td style="width: 20px;">MON</td> <td style="width: 20px;">TUE</td> <td style="width: 20px;">WED</td> <td style="width: 20px;">THU</td> <td style="width: 20px;">FRI</td> <td style="width: 20px;">SAT</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>1</td> </tr> <tr> <td></td> <td>7</td> <td>8</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>14</td> <td>15</td> <td></td> <td></td> <td></td> <td></td> </tr> </table> </div> <div style="font-size: 48px; font-weight: bold; margin-right: 10px;">2</div> <div> <p style="font-size: 18px; font-weight: bold; margin: 0;">PLANNING THE CAMPAIGN</p> </div> </div> | SUN | MON | TUE | WED | THU | FRI | SAT | | | | | | | 1 | | 7 | 8 | | | | | | 14 | 15 | | | | |  |
| SUN | MON | TUE | WED | THU | FRI | SAT | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | 1 | | | | | | | | | | | | | | | | | | | | | | | |
| | 7 | 8 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 14 | 15 | | | | | | | | | | | | | | | | | | | | | | | | | | | |

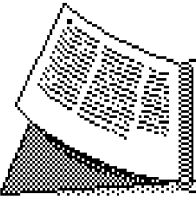

| SECTION 2 - PLANNING THE CAMPAIGN | PAGE |
|--|---------|
| A. MARKET RESEARCH | |
| 1. Overview | 2-2 |
| 2. Preliminary Research | 2-4 |
| 3. Focus Groups | 2-6 |
| 4. Telephone Surveys | 2-8 |
| 5. Mail-Back Surveys | 2-10 |
| 6. Executive Interviews | 2-12 |
| 7. Traffic Measurements | 2-14 |
| B. CONSTITUENCY BUILDING | |
| 1. Overview | 2-16 |
| 2. Database Development | 2-18 |
| 3. Educational Workshops | 2-20 |
| 4. Interagency Coordination | 2-22 |
| 5. Political Liaison | 2-24 |
| 6. Enforcement Liaison | 2-26 |
| 7. Judicial Liaison | 2-28 |
| 8. Identifying Media Partners | 2-30 |
| 9. Keeping the Media's Attention | 2-32 |
| 10. Environmental Group Concerns | 2-34 |
| 11. Community Relations | 2-36 |
| C. CAMPAIGN OBJECTIVES AND STRATEGIES | |
| 1. Overview | 2-38 |
| 2. Setting Campaign Objectives | 2-40 |
| 3. Identifying Key Issues | 2-42 |
| 4. Identifying Target Audiences | 2-44 |
| 5. Budgeting | 2-46 |
| 6. Hiring Professionals | 2-48 |
| 7. Selecting Media Channels | 2-50 |
| 8. Scheduling | 2-52 |
| D. MARKETING MATERIALS | |
| 1. Overview | 2-54 |
| 2. Brochures | 2-56 |
| 3. Newsletters | 2-58 |
| 4. Flyers | 2-60 |
| 5. Posters and Print Ads | 2-62 |
| 6. Newspaper Advertisements | 2-64 |
| 7. Radio Spots | 2-66 |
| 8. Television Spots | 2 - 6 8 |
| 9. Outdoor Advertising | 2-70 |
| 10. Official Signing | 2-72 |
| 11. Premiums | 2-74 |

| | |
|---|---|
| CONTENTS | TABLE OF CONTENTS |
|  | IMPLEMENTING THE CAMPAIGN |
| |  |

| SECTION 3 - IMPLEMENTING THE CAMPAIGN | PAGE |
|--|-------------|
| A. MEDIA RELATIONS | |
| 1. Orientation | 3-2 |
| 2. Press Kits | 3-4 |
| 3. Press Releases | 3-6 |
| 4. Personnel Training | 3-8 |
| B. ADVERTISING PLACEMENTS | |
| 1. Radio | 3-10 |
| 2. Billboards | 3-12 |
| 3. Paid Television Advertising | 3-14 |
| 4. Television Public Service Announcements | 3-16 |
| 5. Newspapers | 3-18 |
| C. PROMOTION | |
| 1. Direct Mail | 3-20 |
| 2. Radio and TV Appearances | 3-22 |
| 3. Computer Communication | 3-24 |
| D. COMMUNITY RELATIONS | |
| 1. Overview | 3-26 |
| 2. Public Meetings | 3-28 |
| 3. Ridesharing Agencies | 3-30 |
| 4. Business Liaison | 3-32 |
| 5. Private Industry Support | 3-34 |
| 6. Telephone Hotline | 3-36 |
| E. ONGOING MARKETING | |
| 1. Overview | 3-38 |
| 2. Common Questions and Answers | 3-40 |
| 3. More Questions and Answers | 3-42 |
| 4. Answering Criticism | 3-44 |

| | |
|--|---|
| TABLE OF CONTENTS | CONTENTS |
|  MONITORING AND EVALUATING |  |

| SECTION 4 - MONITORING AND EVALUATING | PAGE |
|--|-------------|
| A. OVERVIEW | |
| 1. Overview | 4-2 |
| B. EVALUATION PLAN | |
| 1. Elements of the Evaluation Plan | 4-4 |
| 2. The Evaluation Tableau | 4-6 |
| 3. Setting Evaluation Objectives | 4-8 |
| 4. Defining Measures of Effectiveness | 4-10 |
| 5. Comparison Strategies | 4-12 |
| 6. The Evaluation Sample | 4-14 |
| C. MONITORING THE PROJECT | |
| 1. Overview | 4-16 |
| 2. Data Collection Frequency | 4-18 |
| 3. Presenting Findings | 4-20 |
| D. MONITORING THE CAMPAIGN | |
| 1. Overview | 4-22 |
| 2. Measuring Exposure | 4-24 |
| 3. Cost Vs. Exposure | 4-26 |
| 4. Measuring Reaction | 4-28 |
| E. EVALUATION PITFALLS | |
| 1. Lack of Historical Perspective | 4-30 |
| 2. Threats to Validity | 4-32 |
| 3. Internal Threats to Validity | 4-34 |
| 4. External Threats to Validity | 4-36 |
| 5. Threats to Credibility | 4-38 |

| | |
|---|--|
| <p>CONTENTS</p> | <p>TABLE OF CONTENTS</p> |
|  | <p>APPENDICES</p>  |

| APPENDIX | PAGE |
|------------------------------------|-------------|
| A. CASE STUDIES | A-1 |
| B. SAMPLE MATERIALS | B-1 |
| C. HOV PROJECT DATA | C-1 |
| D. SAMPLE SURVEY FORMS | D-1 |
| E. DIRECTORY OF MARKETING CONTACTS | E-1 |
| F. SELECTED BIBLIOGRAPY | F-1 |