ECOWILL Deliverable 6.2/3

Marketing & Delivery of ECOWILL Short-Duration Training

<table>
<thead>
<tr>
<th>Deliverable Dissemination Level</th>
<th>Public</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year of Preparation</td>
<td>2013</td>
</tr>
</tbody>
</table>
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1 Introduction

ECOWILL partners began delivering the project’s short-duration training (SDT) in the summer of 2011 and continued until the end of the project in April 2013.

In all countries the training followed the format that had been developed by the project and conveyed to trainers through a series of seminars held in all thirteen countries in 2011 and 2012. All the training was delivered by ECOWILL certified trainers that had attended one of these seminars.

The knowledge and time that went in to developing the highly-effective format of ECOWILL SDT, and the fact that the training was standardised across all partner countries, were two of the project’s main strengths.

Overall, the thirteen countries exceeded the project’s cumulative target of training at least 10,500 drivers during the lifetime of the programme. ECOWILL training will also continue after the project ends.

The thirteen national partners ran some excellent, creative marketing campaigns to promote ECOWILL SDT in their countries. These campaigns were diverse in their nature, as was the delivery of the training. This diversity allows for some interesting comparisons which are presented in this report.

The report starts with an overview of training in the thirteen countries, presented through a series of tables which allow for easy comparisons between countries. This is followed by summaries of each of the thirteen national campaigns and then by examples of marketing materials from each country. The report then ends with a discussion of some of the main findings and their implications for future work to promote ecodriving.
2 Overview of ECOWILL Short-Duration Training

Table 1: Summary of Training by Country

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of Drivers Trained</th>
<th>Reduction Fuel Consumption</th>
<th>Duration of training / mins</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria (AU)</td>
<td>260</td>
<td>15.7%</td>
<td>60</td>
</tr>
<tr>
<td>Croatia (HR)</td>
<td>500</td>
<td>15.2%</td>
<td>60 - 90</td>
</tr>
<tr>
<td>Czech (CZ)</td>
<td>611</td>
<td>10.0%</td>
<td>60</td>
</tr>
<tr>
<td>Finland (FI)</td>
<td>284</td>
<td>9.2%</td>
<td>60 - 75</td>
</tr>
<tr>
<td>Germany (DE)</td>
<td>1386</td>
<td>15.7%</td>
<td>45 - 60</td>
</tr>
<tr>
<td>Greece (GR)</td>
<td>712</td>
<td>14.0%</td>
<td>45 - 60</td>
</tr>
<tr>
<td>Hungary (HU)</td>
<td>500</td>
<td>9.8%</td>
<td>60</td>
</tr>
<tr>
<td>Italy (IT)</td>
<td>164</td>
<td>16.9%</td>
<td>60</td>
</tr>
<tr>
<td>Lithuania (LT)</td>
<td>500</td>
<td>13.0%</td>
<td>60</td>
</tr>
<tr>
<td>Netherlands (NL)</td>
<td>883</td>
<td>18.0%</td>
<td>50 - 120</td>
</tr>
<tr>
<td>Poland (PL)</td>
<td>504</td>
<td>11.5%</td>
<td>60</td>
</tr>
<tr>
<td>Spain (ES)</td>
<td>518</td>
<td>19.4%</td>
<td>60</td>
</tr>
<tr>
<td>United Kingdom (UK)</td>
<td>3,802</td>
<td>13.3%</td>
<td>50 - 60</td>
</tr>
<tr>
<td><strong>Total / Average</strong></td>
<td><strong>10,624</strong></td>
<td><strong>14.0%</strong></td>
<td>N/a</td>
</tr>
</tbody>
</table>

Table 1 shows that ECOWILL short-duration training (SDT) took place in all thirteen national partner countries during the lifetime of the programme. The thirteen partners each had a target to train at least 500 drivers and ten of the thirteen countries achieved or exceeded this target. The three partners that did not make the target – Austria, Finland and Italy - all ran good marketing and PR campaigns but found there was little demand for ECOWILL SDT.

Austria, Finland, Germany, the Netherlands and the UK also shared a joint target of training 6,500 drivers and this target was exceeded: the actual figure was 6,615. In total, ECOWILL partners exceeded their cumulative targets of training at least 10,500 drivers: the total figure was 10,624.

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1 Weighted mean
The duration of ECOWILL SDT per driver varied from 45 minutes to two hours, which were the limits agreed early on in the project. Most partners opted for around one hour per person. The average reduction in fuel consumption seen on the day of training varied from 9.2% to 18.0%, with no significant correlation between the duration of training and the reduction achieved.

Table 2: Fleet or Private Drivers

<table>
<thead>
<tr>
<th>Primary Market</th>
<th>AU</th>
<th>HR</th>
<th>CZ</th>
<th>FI</th>
<th>DE</th>
<th>GR</th>
<th>HU</th>
<th>IT</th>
<th>LT</th>
<th>NL</th>
<th>PL</th>
<th>ES</th>
<th>UK</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fleet</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>6</td>
</tr>
<tr>
<td>Private</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Fleet &amp; Private</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
</tbody>
</table>

Target markets were split almost evenly between private and fleet drivers, with six partners primarily targeting fleet, five primarily targeting private, and two partners targeting both sectors approximately equally. However one of the key learnings from Croatia was that if they were to repeat a similar campaign they would switch from targeting private to fleet drivers, which would bring the totals to seven targeting fleet and four targeting private.

Table 3: Pricing and Subsidies

<table>
<thead>
<tr>
<th>Most Training</th>
<th>AU</th>
<th>HR</th>
<th>CZ</th>
<th>FI</th>
<th>DE</th>
<th>GR</th>
<th>HU</th>
<th>IT</th>
<th>LT</th>
<th>NL</th>
<th>PL</th>
<th>ES</th>
<th>UK</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free (fully subsidised)</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>6</td>
</tr>
<tr>
<td>Part-subsidised</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Unsubsidised</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td>3</td>
</tr>
</tbody>
</table>

Table 3 shows summarises partners’ approaches to pricing the training in their country: Six partners provided most of their training free to customers; three partners sold primarily at subsidised rates; and three sold primarily at unsubsidised commercial rates. In general, the countries with less ecodriving experience provided training free or while the experienced ecodriving countries were more likely to sell training unsubsidised or part-subsidised.
Table 4: Lead Marketing Message

<table>
<thead>
<tr>
<th>Lead Message</th>
<th>AU</th>
<th>HR</th>
<th>CZ</th>
<th>FI</th>
<th>DE</th>
<th>GR</th>
<th>HU</th>
<th>IT</th>
<th>LT</th>
<th>NL</th>
<th>PL</th>
<th>ES</th>
<th>UK</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost savings / Fuel savings</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>9</td>
</tr>
<tr>
<td>Safety</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Drive better / Modern driving style</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Lower insurance premiums</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>More economical; not necessarily slower</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

* Lead message for at least one target sector. If a country had different lead messages for different sectors (e.g. for fleet and for private drivers) then both lead messages are listed.

It is no surprise that by far the most popular marketing message was the financial benefits of reduced fuel consumption. Several partners commented on how the current difficult economic climate has put renewed focus on cost savings in their country and that this helped inform their decision to focus on cost savings. The next most popular messages were the safety benefits, which was the primary message of three campaigns, and the concept of ecodriving as a better or more modern way of driving, which also led three campaigns. The idea behind promoting ecodriving as better or more modern driving is to position it as an aspirational product that people will want to do, rather than something they feel they ought to do. It is interesting to note that none of the thirteen partners led their campaigns with environmental messages.
Table 5: All Marketing Messages

<table>
<thead>
<tr>
<th>Message included in marketing campaign</th>
<th>AU</th>
<th>HR</th>
<th>CZ</th>
<th>FI</th>
<th>DE</th>
<th>GR</th>
<th>HU</th>
<th>IT</th>
<th>LT</th>
<th>NL</th>
<th>PL</th>
<th>ES</th>
<th>UK</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost savings / Fuel savings</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>13</td>
</tr>
<tr>
<td>Safety</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>11</td>
</tr>
<tr>
<td>Reduced emissions / Environmental benefit</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>9</td>
</tr>
<tr>
<td>Reduced stress</td>
<td>✓</td>
<td>✓</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Drive better / Modern driving style</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Vehicle maintenance cost savings</td>
<td>✓</td>
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<td></td>
<td></td>
<td></td>
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<td></td>
<td>1</td>
</tr>
<tr>
<td>Advice on training learner drivers</td>
<td>✓</td>
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<td></td>
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<td>1</td>
</tr>
<tr>
<td>Enhance corporate social responsibility</td>
<td>✓</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td>1</td>
</tr>
<tr>
<td>More economical; not necessarily slower</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td>1</td>
</tr>
<tr>
<td>Free training</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>International training standards</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Reduction in insurance premiums</td>
<td>✓</td>
<td></td>
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<td></td>
<td>1</td>
</tr>
</tbody>
</table>

Table 5 confirms that cost savings was the most popular message, featuring in all national campaigns and that the safety benefits was the next most popular message, featuring in all but two countries’ campaigns. The environmental benefits, although not the primary message of any campaign, was a popular additional message, featuring in nine of the thirteen national campaigns. Reduced driver stress and ecodriving as a better or more modern way of driving were the next most popular messages.
Table 6: Marketing Activities

<table>
<thead>
<tr>
<th>Marketing Activities</th>
<th>AU</th>
<th>HR</th>
<th>CZ</th>
<th>FI</th>
<th>DE</th>
<th>GR</th>
<th>HU</th>
<th>IT</th>
<th>LT</th>
<th>NL</th>
<th>PL</th>
<th>ES</th>
<th>UK</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>13</td>
</tr>
<tr>
<td>Leaflets</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>13</td>
</tr>
<tr>
<td>Give-aways</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
<td>✓</td>
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<td>7</td>
</tr>
<tr>
<td>Vouchers / coupons</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
<td>4</td>
</tr>
<tr>
<td>SDT ‘menu card’</td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<td>1</td>
</tr>
<tr>
<td>Driver Certificates</td>
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<td>✓</td>
<td>✓</td>
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<td>✓</td>
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<td>Smartphone apps</td>
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</tr>
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<td></td>
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</tr>
<tr>
<td>Promoting at events</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>11</td>
</tr>
<tr>
<td>Branded cars</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
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<td>✓</td>
<td>4</td>
</tr>
<tr>
<td>Presentations</td>
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<td>✓</td>
<td>✓</td>
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<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Direct marketing to existing contacts</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>6</td>
</tr>
<tr>
<td>TV coverage</td>
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<td>✓</td>
<td>✓</td>
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<td>✓</td>
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<tr>
<td>Free training for key decision makers</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Promotion on social media</td>
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<td>✓</td>
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<td>Sales phone calls</td>
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<tr>
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</tbody>
</table>
Table 6 gives an indication of the great diversity of the thirteen national marketing campaigns. The only activities common to all thirteen countries were the use of websites, leaflets and presentations. See chapter 4 (page 32) for images from these thirteen marketing campaigns.

Table 7: Assessment of Market Potential for Unsubsidised Training

<table>
<thead>
<tr>
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<th>AU</th>
<th>HR</th>
<th>CZ</th>
<th>FI</th>
<th>DE</th>
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<th>PL</th>
<th>ES</th>
<th>UK</th>
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</thead>
<tbody>
<tr>
<td>Large potential for <strong>private</strong> drivers</td>
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<td>2</td>
</tr>
<tr>
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</tr>
<tr>
<td>Large potential for <strong>fleet</strong> drivers</td>
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</tr>
<tr>
<td>Niche market for <strong>fleet</strong> drivers</td>
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</tbody>
</table>

Table 7 shows that ten of the thirteen partners think there is no significant market for selling unsubsidised SDT to private drivers in their country. One partner, Greece, thinks there is a large market potential in this area and two partners, Germany and Poland, think there is the potential for smaller or niche markets. Regarding unsubsidised SDT for fleet drivers the situation is more positive, with three partners seeing large potential and four seeing smaller or niche market potential. Six partners see no significant market for fleet drivers in their country.
3 Summaries of National Campaigns

Austria
A total of 260 drivers were trained with ECOWILL SDT in Austria.

Target Market and Marketing Messages
In Austria the main target market was fleets and AEA prioritised their marketing messages as follows: cost savings (primarily fuel costs but also vehicle maintenance); reduction in stress; enhanced safety. AEA had an interesting secondary market which was experienced drivers accompanying learner drivers, which in practice usually means parents teaching their children. For this secondary market AEA led the campaign messages were, in order of priority: get to know the modern way of driving; enhanced safety; tips on training learner drivers; cost savings (primarily fuel costs but also vehicle maintenance); and reduced stress.

Fleet drivers and the accompanying marketing messages were chosen based on AEA’s extensive experience with this sector. The second target category –experienced drivers accompanying learners - was a new approach for AEA. This idea came from a meeting between AEA and members of working group on ecodriving from the national driving school association.

Was Training Subsidised?
Approximately 55% of ECOWILL training in Austria was free, 14% was subsidised and 31% was sold at commercial unsubsidised prices.

Austrian Marketing Campaign
AEA ran a good marketing campaign including high volume print runs - including 67,000 of a voucher and two leaflets each with print runs of 10,000 - presentations at around ten conferences, stands at events and promotion on Facebook. AEA generated some good PR including a presentation of the ecodriving rules in a national newspaper and a handbook for fleet owners. Nevertheless, the experience shows that demand for training was very low both from fleet and also private drivers. The format that turned out to be successful was to offer short duration trainings for visitors of events and fairs.

Partnerships
AEA cooperated with driving schools, the driving school association, and the European week on sustainable mobility. Special attention was given to fleets where partnerships e.g. with Leaseplan Austria and the Austrian Post were launched.

Feedback
The feedback from both drivers and trainers was very positive about short duration trainings. Participants regularly report that the training exceeded their expectations in terms of fuel savings.

Main Findings
A lot of sales and marketing effort in Austria produced only little interest in short duration trainings. There exists currently only a small market for fleet drivers. However AEA note that this could change in the future, for example with a higher future oil price. The concept is especially interesting as a training offer for participants of events or fairs.
AEA concluded that activities to promote ecodriving to learner drivers (ECOWILL WP7 activities) are more likely to bear fruit at the moment.

**What Would AEA Do Differently?**
From today's perspective it would have been very important to develop also partnerships with automobile clubs in Austria which was not successful during the ECOWILL project period.
Croatia
A total of 500 drivers were trained with ECOWILL SDT in Croatia.

Target Market and Marketing Messages
In Croatia the main target market for Ecowill SDT was private drivers and the secondary market fleet. For private drivers EIHP led with marketing messages prioritised as: cost savings; reduced emissions; reduced stress; and reduced accident rates. And for fleets the overriding message was to enhance corporate and social responsibility credentials by, in order of priority: cost savings; reduced accident rates; and reduced emissions. The choice of messages was based on the belief that most people in Croatia are not overly concerned about the environment but, in the wake of the financial crisis, are very interested in saving money.

The logic behind targeting private drivers as well as fleets was to try to increase awareness of the subject of ecodriving in a county where it is little known.

Was Training Subsidised?
Some of the training was provided free of charge, and some was subsidised.

Croatian Marketing Campaign
EIHP led a comprehensive and ambitious advertising campaign based around a visual they created comprising major Croatian landmarks from seven different cities and a slogan “DOK VOZIM - ŠTEDIM!”, which translates as “While I am driving - I am saving!”. The overall aim of the campaign was to achieve broader recognition of ecodriving among the general public because ecodriving is a new topic in Croatia. This campaign included three different leaflets (for Consumers, commercial fleets, and municipalities), leaflets, business cards, coupons, ecodriving certificates, CD covers, file covers, roll up banners, web banners. give-aways (leaflets, T-shirts, car sunshades, key chains and bags) and event stands in busy city squares. Considerable press coverage was achieved including around 50 press articles, six TV broadcasts and eight radio broadcasts. Comprehensive information was uploaded to the national web site www.ekovoznja.hr. EIHC did not undertake many sales phones calls and meetings, but focussed on ‘marketing’ more than ‘sales’.

Partnerships
EIHC cooperated with several organisations to promote training, including medial organisations, the Croatian Auto Club magazine and Toyota, who promoted the training on their Facebook page.

Feedback
Drivers tended to be very sceptical before their training but were invariably convinced afterwards. The feedback from trainers was also very positive.

Other Information
EIHC's Ecowill training beat 32 other entries to win a national competition for the 'best educational eco-project'. As a result of ECOWILL the Croatian Government has announced funding (estimated at more than €650 000) for a target to train 51,000 drivers with ECOWILL SDT by 2016.

Main Findings
EIHC found that consumers in Croatia are currently not will to pay for ecodriving SDT and they put this down to the fact that ecodriving is a new and little known concept. EIHC found a moderate
interest from fleets, and believe that with good cooperation from other stakeholders such as vehicle manufacturers and insurance companies, there could be a future for unsubsidised ECOWILL SDT.

**What Would EIHC Do Differently?**
EIHC would primarily target fleet rather than consumers if running a similar campaign again as they found very little demand from consumer.
Czech Republic
A total of 611 drivers were trained with ECOWILL SDT in the Czech Republic.

Target Market and Marketing Messages
SEVEn targeted three categories of driver: company car drivers that were required to undergo ongoing driver training; new drivers that had recently acquired their licences; and other consumers interested in ecodriving. The messages were tailored to each of the three groups. For company car drivers the message was drive more economically whilst not necessarily more slowly. For new drivers the message was learn to drive better, more safely and more efficiently. And for other consumers the message was that they may already drive well, but could drive even better.

Was Training Subsidised?
500 drivers were trained for free with the costs paid by ECOWILL, and another 50 drivers’ training was 50% subsidised, the remaining number underwent the course on a commercial basis already (or as part of more extensive training paid for as a whole).

Czech Marketing Campaign
SEVEn carried out national marketing themselves – the central point of communication was the national website www.uspornajizda.cz, where all relevant information on SDTs and other project activities was published (press releases on train-the-trainer seminars, promotion events, any marketing material etc.). The website serves for on-line registrations for SDT, as an archive of results from all SDTs and also as the instrument how to get feedback from SDT participants (via filling in the prescribed form in order they could get the electronic copy of the protocol).

Furthermore, in order to increase the attention of the target group, several tens of thousands of promotional leaflets were also printed (two versions), certificates confirming the participation in a course, gift certificates for SDT, posters, stickers onto cars, t-shirts, energy class calculator used to assess the performance regarding fuel consumption during SDT, and, before the end of the project, also “booklet” featuring overall results from more than 500 SDTs and also positive opinion of several SDT participants on long-term effects of ecodriving training they can see on themselves. The key instrument which helped to “persuade” both the trainers and also drivers was to work out a written common protocol into which the trainers were required to document participants’ performance (it was also translated into English and Finnish for possible use for customers speaking such a language). SEVEn also ran a PR campaign (publishing several press releases and sent them to various journalists and magazines covering automotive topics, SDTs were offered free of charge at three promotion events) and organized direct mailing to a number of public institutions around the country to invite them undergo a course. Individual driving schools also undertook their own marketing.

Although SEVEn put a lot of effort into a nationwide marketing campaign, SEVEn reports their campaign has had “only negligible impact” so far and it is the driving schools’ campaigns that have been more successful and managed to secure the large majority of participants in SDTs so far. After analysing the possible reasons, SEVEn has concluded that what may really influence the decision-making are “concrete quantified effects”. Therefore, as the “right” instrument for creating demand for SDTs beyond ECOWILL, there is being developed the mentioned “booklet” featuring overall
results from 500+ SDTs and long-term effects observed by some of the participants. These valuable data and personal experiences will be used in further promotion at a new Facebook page, and the internet portal which will soon be developed. This will be the ultimate contribution of ECOWILL project for SDT expansion in the Czech Republic and hopefully this might “trigger” the interest from other, especially fleet managers (which some of driving schools plan to contact with the booklet shortly).

**Partnerships**
SEVEN worked closely with several Czech driving schools. Cooperation was also established with Skoda Auto, Michelin, CE Solutions, and ÚAMK – Automotoklub Škoda.

**Feedback**
Feedback from trainers on the format of the training was positive.

**Other Information**
SEVEN developed a written protocol and quantitative evaluation for each round and found this worked well. However, trainers frequently made mistakes and forgot to record some of the information – basic data (average fuel consumption and average speed were largely correct, though).

**Main Findings**
SEVEN’s approach of working with driving schools and encouraging them to market and sell their own training was intended to establish arrangements that could continue to provide SDT beyond the life of the ECOWILL project. However due to the lack of demand, SEVEN sees only a very small market for unsubsidised training in the Czech Republic, perhaps 100-200 drivers per year from the most committed and professional driving schools.

**What Would SEVEN Do Differently?**
SEVEN considers that their strategy was broadly correct but that their campaign has highlighted a fundamental lack of demand for SDT.
Finland
A total of 284 drivers were trained with ECOWILL SDT in Finland.

Target Market and Marketing Messages
Motiva targeted fleets rather than consumers because their experience from the ECODRIVEN project told them this would be more effective and more pragmatic since one decision maker can sign up tens or hundreds of drivers. Motiva believe there is very little interest in ecodriving SDT from private individuals. Motiva’s marketing messages were, in order of priority: safety; environment; economy/savings. In general Motiva sought to convey that even if an organisation has a company car policy (e.g. CO₂ limits), the driver is the other key factor that must be considered and training is an effective way to ‘update’ driving styles to modern car technologies as well as improving safety at the same time.

Was Training Subsidised?
Motiva offered free training to key decision makers and influencers, but other training was sold at unsubsidised, commercial prices.

Finnish Marketing Campaign
Motiva have considerable experience of ecodriving training and good fleet contacts and as a result they concentrated more on ‘sales’ to existing contacts rather than ‘marketing’ to generate new leads and new interest. They produced one thorough leaflet ‘Smart Choices for Driving’ that was distributed to ECOWILL trainers (200 per trainer) and driving schools to help them promote training. The leaflet was also delivered to the regional network of Consumer Energy Advice; to the Association of Automotive and Traffic Journalists (109 brochures) and to the Association of Engine Journalists and PR Officers (165 brochures). The members of the latter association come from both media and car importers and dealers and this initiative helped promote ECOWILL SDT among both fleet operators and car users. ECOWILL SDT was also promoted in Motiva’s newsletter.

Another key to Motiva’s marketing strategy was to offer free training to key fleet decision-makers, journalists, and other influential people including senior civil servants of the Ministry of Transport & Telecommunications; the Finnish Transport Safety Agency; and to core members of the Finnish Parliament.

Partnerships
Motiva secured good partnerships to promote ECOWILL with the following organisations: WWF Green Office; the Finnish Driving School Association; Consumer Energy Advice, whose advisors were trained to deliver advise about the training); LIVE (the Finnish network of Mobility Management experts); and the Finnish Petroleum Federation (an article 'Let’s drive smart’ in the issue 1/2013; ECOWILL trainer network was mentioned)

Feedback
Feedback from trainees was very positive, who particularly liked the balance between safety and fuel economy. In general feedback from trainers was good although some thought one hour was a little too tight for training. So, in some cases this was extended to 90 minutes.
Other Information
Motiva feel that their approach of targeting largely organisations already known to them worked well and was efficient. However the economic climate has led to many organisations cutting their training budgets which reduced demand and made sales difficult. As Motiva said “The product is good but it is difficult to market” People support the idea of ecodriving “but few admit they or their workers need training.”

Main Findings
A focussed campaign based on sales rather than marketing, was cost-effective. Motiva believes there is no market for ecodriving SDT among consumers in Finland. For fleets, Motiva believe there could be a market if we could get SDT embedded into processes, for example tied in with vehicle purchasing, environmental programmes, or as part of new-starter induction training.

What Would MOTIVA Do Differently?
Motiva recommend other ways of promoting ecodriving be investigated for their effectiveness, including theoretical training (without practical training); training in combination with advanced monitoring device and the same combination of training and advanced devices plus incentive schemes.
Germany
A total of 1386 drivers were trained with ECOWILL SDT in Germany. Another 531 drivers were trained by ECOWILL certified trainers but with longer duration training. These 531 are not counted in the summary table at the front of this report.

Target Market and Marketing Messages
DVR’s strategy was to use the training provided under ECOWILL WP6 as an opportunity to introduce ecodriving SDT to influential stakeholders that might promote or purchase SDT in the future, including the media, politicians, insurance companies and vehicle manufacturers. The logic was that there was already considerable experience of SDT in Germany, so the value of training a few hundred more drivers would be limited, but that ECOWILL provided an opportunity to work strategically to increase awareness and therefore future demand among important influencers and decision makers. The main message of the German campaign was that the benefits of ecodriving are broader than just efficiency. The safety benefits were particularly emphasised.

Was Training Subsidised?
Most of the training carried out or organised by DVR was subsidised, often free of charge, since it was targeted at decision makers and influencers for whom it would not have been appropriate to charge.

German Marketing Campaign
The marketing campaign in Germany included many initiatives – leaflets, stands, branded cars etc – undertaken or produced for specific events. These included some high profile international events such as the International Transport Forum meeting at Leipzig; and the AMI trade fair also in Leipzig. DVR also organised marketing in conjunction with Road Safety Day and organised a day of training with the German Ministry of Transport. In addition to events, DVR produced leaflets, fliers, a website, a smartphone app, and several video clips designed to be viewed on mobile phones and targeted at specific sectors of the population.

Partnerships
DVR worked with the FIA to promote ECOWILL SDT at the ITF in Leipzig and in a similar way with Ford at the AMI.

DVR tried to encourage selling by third parties such as driving schools. The aim of this was also to establish arrangements that could continue and grow beyond the life of the project. However, DVR dropped plans with German Driving School association (BVF) to train all their trainers, mainly because of low demand from private individuals.

Feedback
Feedback from trainers was almost universally good. Trainers thought the format of the training was better than previous SDT they had experienced. They liked the emphasis on coaching, and individualised training targets based on an individual trainee’s capabilities and interests.

Other Information
DVR report that the strategy to involve key stakeholders worked well because “The product sells itself once it’s tried.”
Main Findings
The demand for unsubsidised SDT for private drivers is small, although DVR considers there is a niche market in this area for those instructors willing to put in the effort to acquire drivers in this category.

DVR believes there is a market potential for unsubsidised fleet training but that it is too early to judge the effectiveness of the ‘umbrella’ advertising campaign that DVR facilitated to help driving schools sell SDT training themselves.

DVR envisage 3,000 – 4,000 drivers per year trained with ECOWILL SDT after the project ends.
Greece
A total of 712 drivers were trained with ECOWILL short-duration training in Greece.

Target Market and Marketing Messages
The primary market was private drivers, but unlike in most other countries, this included learner as well as licenced drivers. This target market was the natural choice given that CRES worked largely through driving schools. The secondary market was fleet. In all cases the messages were prioritised as fuel costs, CO$_2$, and then safety. These messages were chosen due to the high cost of fuel in Greece and because of the national targets for CO$_2$ reduction.

Was Training Subsidised?
The 12 ECOWILL master trainers offered free training with the costs subsidised by ECOWILL. Training provided by the other driving schools was not subsidised and prices varied according to the approach chosen by the individual school or trainer: Some trainers offered one hour SDT for free when purchased with other training. Other trainers charged around €15-20 for an hour’s training, which is the standard rate for driving lessons in Greece.

Greek Marketing Campaign
The marketing campaign in Greece was built on CRES’s ecodriving campaign that has run since 2007 and included leaflets, stickers, car first-aid kit, car sunshades, LED torches and USB sticks. The material was distributed by driving schools, at various events, and as information and gifts given after training. The campaign in Greece also included sales phone calls to known contacts.

The ECOWILL master trainers were reasonably successful at selling their training, which was subsidised by ECOWILL. In contrast the driving schools selling at unsubsidised commercial prices were not very successful. CRES puts down to the fact that ecodriving as a product not well known in Greece and there is little demand.

Partnerships
The ECOWILL project and Ecodriving in general was promoted with the help of the PanHellenic Association of Driving Instructors (PADI). PADI played a key role in choosing the 12 master trainers and in stimulating driving instructors to include Ecodriving in their training courses

Feedback
ECOWILL SDT was popular with trainers and many more trainers have expressed their interest participating in ECOWILL train-the-trainer seminars. Interest among trainers in ECOWILL SDT remains high.

Other Information
A big contrast was noted between relatively high interest and demand for SDT from learner drivers but very low interest or demand from licenced drivers. This is an interesting finding as most other countries did not actively target learner drivers.

Main Findings
There was little demand from licenced drivers but significant demand from learners. Nevertheless, driving schools found it difficult to sell training at unsubsidised prices. CRES believes there is the potential in Greece for a significant market for unsubsidised training.
What Would CRES Do Differently?
CRES considers there is a need for a more intense marketing strategy to promote SDT to licensed drivers and that this should focus on the high long term benefits of ecodriving SDT relative to its low cost.
Hungary
A total of 500 drivers were trained with ECOWILL SDT in Hungary.

Target Market and Marketing Messages
In Hungary, Geonardo targeted private drivers and Leaseplan targeted fleets. The marketing messages were prioritised as: fuel savings; free training; and the fact that ECOWILL represented international training standards.

Was Training Subsidised?
In most cases training for private drivers was free, and for a small amount private drivers there was only a very modest charge of 3-5 Euros. The reason for offering this training for free was that ecodriving is a relatively new concept in Hungary and Geonardo realised that in conversations with policy makers and potential clients it would be very useful to have their own set of data demonstrating the effectiveness of training.

Hungarian Marketing Campaign
The marketing campaign in Hungary included leaflets; a local website available in Hungarian through which users could apply for training as well as learn information; give-aways such as bookmarks; and an ECOWILL pull-up stand that was used at several events including the Travel and Drive Safely during a Lifetime Campaign of the Hungarian Autoclub. Geonardo also ran a good PR campaign, highlights of which included a radio interview on Klub radio, an article published in the magazine of the Hungarian Autoclub, and an online campaign through other portals including Greenfo, Zöldsarok Naptár (Greencorner calendar) and ECOP.hu. Trainers and driving schools also carried out their own sales and marketing activities, particularly to their former learner clients.

Geonardo reported that their marketing initiatives were reasonably successful in Budapest but not elsewhere in the country. In rural areas, personal information spread through personal networks was more successful.

Partnerships
Geonardo worked in partnership with the Hungarian Autoclub and with the Hungarian Transport Authority, both of which helped promote the training. Leaseplan in Hungary offered training to their clients through Leaseplan’s bimonthly newsletter, but unfortunately this did not lead to any sales. Geonardo also worked with two driving school associations, MAISZ and JASZKOE who offered ECOWILL SDT to drivers including their previous learner clients.

Feedback on Training
Feedback from trainers and from drivers was positive, although some considered that they would have preferred a longer format. Drivers were generally very satisfied with the training.

Other Information
Geonardo achieved their target of 500 trainees largely through free or low cost training but it proved to be very difficult to sell unsubsidised training. The clear conclusion therefore is that at present there is no fleet or private market for unsubsidised SDT in Hungary. Ecodriving is a little known concept in Hungary and Geonardo believes that further national or international funding would be
required to promote it further before there is significant chance of such a commercial market developing.

**Main Findings**
Without a massive marketing campaign there will not be significant demand for unsubsidised SDT in Hungary. In the current format it is not realistic that ECOWILL SD trainings will continue in Hungary after the project ends.

**What Would Geonardo Do Differently?**
Geonardo would consider combining SDT with other driver training to offer longer courses that include ecodriving.
Italy
A total of 164 drivers were trained with ECOWILL SDT in Italy.

Target Market and Marketing Messages
The primary target market was fleet drivers, for whom the messages were prioritised as cost & fuel savings then emissions. The fleets targeted were largely organisations whose main business is related to driving, such as bus companies, taxi companies and hauliers.

TRAIN targeted an interesting secondary market of private drivers that had lost their licences and that were obliged to attend further driver education in order to regain their licences. Messages for this group were prioritised as costs; fuel; safety; reduced maintenance; and emissions.

Was Training Subsidised?
In Italy ECOWILL SDT was fully subsidised with budget from the ECOWILL project.

Italian Marketing Campaign
The Italian marketing campaign included promoting to fleets through TRAIN's website and through sales phone calls. Consumers were targeted through the website, by driving schools and at events.

Partnerships
UNASCA driving instructors promoted the courses at their driving schools. Although UNASCA did not manage to sell any ECOWILL SDT they are developing another project that will use some of the ECOWILL contents and will try again to promote ecodriving SDT to drivers.

Feedback
No training has yet taken place in Italy.

Other Information
Unfortunately interest in SDT in Italy was very low and despite their sales and marketing effort TRAIN was not able to meet their training target. Public fleets (taxis and buses) were not interested as they said they already undertook training to reduce fuel consumption, and many private companies also reported that they were already involved with ecodriving, sometimes in partnership with big companies including FIAT.

Main Findings
TRAIN concludes there is little interest and no market for unsubsidised ecodriving SDT in Italy.

What Would TRAIN Do Differently?
TRAIN were involved with a similar project in the future they would ensure there was sufficient funding to offer ecodriving SDT for free.
Lithuania
A total of 500 drivers were trained with ECOWILL SDT in Lithuania.

Target Market and Marketing Messages
COWI’s primary market was fleet drivers, from both public and private sector companies, who were targeted with messages prioritised as costs, CO\(_2\), and then safety. In addition Ecodriving.LT, a driving school, targeted private companies with similar messages. The logic behind the primary focus being on the financial benefits of the training is that the current recession has greatly increased people’s interest in achieving cost savings.

Was Training Subsidised?
ECOWILL SDT was provided free of charge to customers in Lithuania, with the costs funded by the ECOWILL project and by COWI.

Lithuanian Marketing Campaign
The marketing campaign in Lithuania included several different leaflets, give-aways including notebooks, pens, calendars and bags and promotion on COWI’s and training companies’ websites. COWI ran a good PR campaign that achieved considerable TV, radio and press coverage. Facebook advertising in Lithuania worked particularly well. COWI also made use of face-to-face meetings and sales phone calls to recruit potential customers.

Partnerships
COWI’s main partnership was with Ecodriving.LT, a driving school which promoted and delivered ECOWILL SDT.

Feedback
The trainers that delivered ECOWILL SDT in Lithuania were very experienced in ecodriving. They generally liked the training format but questioned whether an hour was too short a time to really change a driver’s behaviour.

Other Information
In order for ECOWILL training to continue, the programme will have to be recognised formally by national authorities in Lithuania and ECOWILL certificates will have to be legally recognised. This process of legalisation is already underway as part of ECOWILL WP7.

Main Findings
COWI ran a successful marketing campaign that generated a lot of interest and there was strong demand for the 500 fully subsidised (free) training places. COWI does not think there would be a market for unsubsidised training among private drivers in Lithuania, but thinks there might be for fleet drivers at the right price. But in general COWI feels that the future of ECOWILL training is more likely to be with initiatives to promote ecodriving in the driving test.

What Would COWI Do Differently?
COWI was satisfied with their marketing campaign and the level of interest in SDT. At a practical level, if repeating something similar COWI would be careful to avoid overly congested city-centre routes where it proved difficult to achieve meaningful comparisons between ‘before’ and ‘after’ drives, and they would keep a reserve list of drivers in case any drivers dropped out.
Netherlands

A total of 883 drivers were trained with ECOWILL SDT in the Netherlands.

Target Market and Marketing Messages
VVCR targeted leasing and other fleet support companies as their primary market, as most of the Dutch SDT was delivered for large fleets in conjunction with their existing leasing companies. This meant VVCR were dealing with people that were able to sign up high numbers of drivers. Fleets were chosen as the target market because VVCR knew from previous experience that private drivers are reluctant to pay for ecodriving training. The marketing messages were prioritised as: reduction in insurance premiums; fewer accidents; fuel consumption & lower emissions.

Was Training Subsidised?
Most of the training in the Netherlands was unsubsidised.

Dutch Marketing Campaign
VVCR produced a leaflet aimed at Fleet Managers, Purchase Managers, HR Managers, Safety health Environment Managers, which deliberately gave little detail on the content of the training but aimed to sell the idea that short, easy to organise, on-the-road training is the best solution. The leaflet was produces in two languages so we could also use it for international business. VVCR also developed other marketing collateral including a menu card for SDT, and a voucher in cooperation with Leaseplan. VVCR attended the Ecomobiel exhibition in October 2012 where they made a presentation about ECOWILL SDT and organised a press conference promoting the training. VVCR also made considerable use of sales phone calls and meetings to promote ECOWILL SDT, often to existing contacts.

Partnerships
Partnerships with Mobiliteitsvoucher, Greenlease (TerBerg), Greenplan (Leaseplan) all worked well as means of promoting ECOWILL SDT.

Feedback
Trainers were positive about ECOWILL SDT. They thought the format made very good use of limited time and they liked the emphasis on coaching and the way that this helped drivers identify and improve with their weak points whilst confirming their strengths. The vast majority of feedback from drivers was also positive but VVCR report that a minority were sceptical.

Other Information
VVCR is the only partner to have sold significant amounts of SDT at unsubsidised commercial prices. Nevertheless VVCR conclude that it was hard to sell ecodriving SDT as a stand-alone product as many clients wanted training that also included more focus on safety.

Main Findings
VVCR were more successful than other partners at selling SDT at commercial prices, partly by making good use of existing contacts within large fleets and leasing companies. VVCR report that it is hard to sell SDT as a stand-alone product and many of their sales were achieved by offering ECOWILL SDT as part of a wider training package that also included more on safety and sometimes other formats.

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such as e-learning. VVCR envisage a market of perhaps 5,000 drivers a year trained with ecodriving SDT.

**What Would VVCR Do Differently?**
If repeating something similar VVCR would try to tailor the SDT offering more to meet customers’ requirements, and at a practical level they would work harder to ensure organisations understood and met the requirements placed on them to ensure sufficient drivers were available for training.
Poland
A total of 504 drivers were trained with ECOWILL SDT in Poland.

Target Market and Marketing Messages
The training was targeted mainly at private drivers in Poland, although this depended on the individual trainers’ marketing strategy. There was also some involvement from fleets, including Coca-cola and the Warsaw mass transit operator, and unusually some traffic controllers were also trained. The marketing messages were decided by individual trainers, but generally prioritised as fuel cost savings then safety benefits.

Was Training Subsidised?
ECOWILL SDT was subsidised but only a relatively small subsidy was required to achieve the necessary sales and meet the national target.

Polish Marketing Campaign
The Polish marketing campaign included leaflets, give-aways, CDs and promotion on KAPE’s website as well as promotion on Facebook and other social media. KAPE ran a PR campaign that achieved some good press coverage, attended events, made presentations, and were involved in organising a promotion called the “Eco Cup of Poland” and another known as “Weekend with ECOWILL”. In general the campaign recognised that the starting point in Poland was a very low level of awareness. KAPE also used sales phone calls and face-to-face meetings to promote ECOWILL SDT to clients.

Partnerships
KAPE had hoped to work in partnership with the car industry but this did not work well. KAPE had mixed success working with Skoda Auto Driving School: For some time this organisation had a monopoly on ECOWILL certified trainers in Poland and sought to take advantage of this position by raising their training prices. On the positive, recruitment of trainees at an event held at the Skodalab showroom organized by Skoda Auto Driving School worked well. Another partnership to promote training with the Neighbourhoods Project worked well.

Other Information
ECOWILL SDT in Poland was carried out by 25 trainers with national coverage.

Main Findings
ECOWILL SDT sold well in Poland considering that it was only supported by a small subsidy: KAPE believes that trainers could have sold approximately four times the 500 subsidised places that were available, had more subsidy been available. KAPE believe that a commercial case might be made for the financing of ECOWILL SDT by insurance companies and that this could allow future training to take place without the need for subsidies from the public purse.

What Would KAPE Do Differently?
If KAPE were involved with a similar initiative again KAPE would seek to a partnership with the insurance industry from an early stage and would avoid getting into a position where one driving school had a monopoly on ECOWILL trainers.
Spain
A total of 518 drivers were trained with ECOWILL SDT in Spain.

Target Market and Marketing Messages
About 80% of the ECOWILL trainees in Spain were private drivers, particularly those that had recently obtained their licences, and the remaining 20% were fleet drivers. For private drivers the marketing messages were prioritised as: safety; cost savings; reduced stress; reduced emissions. As an automobile club and driving school, it was a natural decision for RACC to target new drivers. RACC’s experience within this sector means they are well aware that these new drivers lack driving experience, are often highly concerned about vehicle running costs, and often have a social conscience, thus the decision to employ messages covering safety, costs and emissions. For fleets the order of priority was cost savings; reduced accident rates; reduced CO$_2$ emissions.

Was Training Subsidised?
The training in Spain was fully subsidised with ECOWILL budget.

Spanish Marketing Campaign
The marketing campaign in Spain included two leaflets, one aimed at private drivers and one at fleets; car stickers; giveaways; promotion online and on social networks. RACC sent marketing emails to nearly one million of their own members, and several times they promoted the training on the Movinew’s newsletter, which goes to nearly 150,000 subscribers. RACC ran a good PR campaign promoting ECOWILL that RACC’s Director talking about ecodriving on primetime radio, newspaper articles and TV coverage. RACC were also able to use their own sales force to promote SD training including through sales phone calls and in their offices throughout Spain.

Partnerships
RACC liaised with the National Driving School Association (CNAE) to encourage other driving schools to deliver ECOWILL SDT, but this was not successful and despite CNAE’s initial enthusiasm they have not yet delivered any ECOWILL SDT.

Feedback
Feedback from trainers was positive, both from RACC’s own trainers and those from other driving schools. RACC’s trainers thought the format was refreshing and that the coaching ethos, which is central to ECOWILL SDT, should be promoted and emulated more widely within RACC. External trainers particularly liked having ECOWILL as a uniform standard. However RACC were disappointed with external trainers’ ability and willingness to try to take SDT forward as a commercial proposition.

Other Information
RACC believe there is no market for unsubsidised SDT in Spain. This is partly because until a few years ago the Spanish energy agency IDAE sold heavily subsidised ecodriving training, and this has led to an expectation in Spain that ecodriving training should be subsidised.

Main Findings
There is no significant commercial market for ecodriving SDT in Spain, whether with private or fleet drivers. However, RACC was able to use its market power and commercial strength to achieve the
project’s training targets. Nevertheless RACC expects to train around 400 drivers next year since it has already trained 48 instructors.

What Would RACC Do Differently
If repeating a similar exercise RACC prioritise developing a business plan to try to convince trainers that there is a business case for delivering ecodriving SDT at commercial rates, rather than simply seeing ecodriving as a means of accessing subsidies.
UK
A total of 3,802 drivers were trained with ECOWILL SDT in the UK.

Target Market and Marketing Messages
The main target market was fleet drivers, and a small percentage of the total training was for private drivers. For fleets the marketing messages were, in order of priority, fuel cost savings and then safety benefits / reduced accident rates. For private drivers the messages were prioritised as: Drive better; cost savings; safety; reduced stress. The messages were selected according to EST’s previous experience with fleets and market research, including focus groups, with private drivers.

Was Training Subsidised?
This fleet training was subsidised, with sales prices varying between £12+VAT per driver and £25+VAT per driver. These prices were always based on training eight drivers per day, so they equate to day rates varying between £96+VAT and £200+VAT per day. The lower rates were for training subsidised by ECOWILL and national Government, and the higher prices were subsidised by national Government only.

UK Marketing Campaign
The marketing campaign in the UK included a leaflet aimed at fleet managers and another aimed at private drivers, case-studies and vouchers as well as presentations at events. EST also undertook PR work that secured reasonably good media coverage including an interview on breakfast radio. However, most of the fleet sales were secured though sales phone calls and EST found this approach more successful than traditional marketing. Independent trainers undertook their own marketing which focussed largely on targeting their previous clients and advertising through Facebook and other social media.

Partnerships
ECOWILL in the UK formed a good partnership with the UK’s national fleet “Smarter Driving” programme, which retrained all its 60 instructors with ECOWILL training and changed its training format accordingly. Good cooperation was also achieved with Stay Safe Driving School, although disappointingly this did not lead to a lot of training.

Feedback
The ECOWILL training format was popular with trainers and drivers. Trainers particularly liked the emphasis on coaching, listening to drivers and trying to overcome any objections they might have.

Other Information
The private drivers were trained by around 35 independent instructors and a small driving school, all of which sold unsubsidised training and set their own prices. However, despite strong marketing and PR support from EST, these trainers only achieved few sales – fewer than 50 in total. This was very disappointing as EST had plans to roll out a national programme based on this model of EST doing marketing and PR and local driving instructors selling ECOWILL SDT at commercial rates.

Main Findings
ECOWILL SDT format is popular with trainers and drivers and is effective. There is no significant market for unsubsidised training for private drivers in the UK. For fleets it was easy to sell training
with a strong subsidy but hard work to sell with only a light subsidy and for this reason EST concludes there would be no significant fleet market for unsubsidised training. This could perhaps change if there were other factors, for example a tie-in with insurance companies, or embedded in company procedures.

**What Would EST Do Differently?**
If repeating a similar exercise EST would work harder to obtain approval or recognition from insurance companies.
4 Examples of National Marketing Materials
1. Leaflet: Training accompanying persons

2. Leaflet: Training for fleet

3. Information for fleet

4. Voucher

5. DVD
MARKETING EXAMPLES

1. Logo
2. Slogan
3. T-shirts, car shades, keychains, balloons
4. Press advertising
5. Auto club magazine advert
6. Eco driving certificate
7. Leaflets
8. Leaflet aimed at consumers
9. Fleet manager leaflet
10. Website and banner

11. Presentation banner

12. Greetings cards

13. Presentation templates

14. Cars

15. Public events and conferences

16. Driving seminars

17. Schools
Czech Republic  I  MARKETING EXAMPLES

1. Certificate for participation
2. Gift certificate
3. Leaflets
4. Sticker
5. Results booklet
6. Protocol
1. Booklet

2. Powerpoint presentations
1. Banner and car
2. Exhibition
3. Brochure
4. Certificate of participation
5. Web and mobile access clips
6. Web page
7. Ecowill training day
1. Website

2. Leaflet

3. Stickers
Hungary MARKETING EXAMPLES

1. Bookmarks

2. Web page

3. Molino

4. Car free day brochures

5. Leaflet

6. Radio interviews

7. Driving lessons
MARKETING EXAMPLES

1. Website

ECOWILL  PROGETTO  PARTECIPATI  PIANO DI LAVORO  OBIETTIVI DEL PROGETTO  NEWS
ORGANIZZAZIONE SEMINARI  CORSI E COGNOSCE

ECOWILL  PROGETTO  PARTECIPATI  PIANO DI LAVORO  OBIETTIVI DEL PROGETTO  NEWS
ORGANIZZAZIONE SEMINARI  CORSI E COGNOSCE

Ecological Assessment and Sustainable Implementation for Learning and Use of Energy: ECOWILL

**Objectives of the Project**

- Advance in Energy Meeting of the Project ECOWILL
- SI move to a Promotional Seminar Meeting of the project ECOWILL
- The 3rd Edition of the ECOWILL Rome Seminar

**Participations**

- Three key energy players in action (e.g., eco-friendly initiatives)
- Integration of the topics of energy and the protection of the environment in the classroom and laboratory settings

**Piano of Work**

- The 3rd Edition of the ECOWILL Rome Seminar
- A Panel of Experts Meeting of the Project ECOWILL

**Activities recently**

- A final event in Brussels: the meeting concludes of the project ECOWILL, where the dissemination of the elaborations will be addressed

**Archivi**

- A final event in Brussels: the meeting concludes of the project ECOWILL,where the dissemination of the elaborations will be addressed

**Coral Ecosistema**

The Coral Ecosistema project operates in collaboration with UNHCR, aims to provide specific training for people of the project, in order to make them able to work in their own country and to contribute to the sustainable development of the region.

- A final event in Brussels: the meeting concludes of the project ECOWILL, where the dissemination of the elaborations will be addressed

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Lithuania | MARKETING EXAMPLES

1. Certificate for trainees

2. Handbook for short duration trainees

3. Leaflet for stakeholders

4. Notebook for trainees made of recycled paper

5. Brochure

6. Work calendar
1. Brochures

**VVCR SAFE & ECO DRIVING**

Erik Roozendaal (Circ)
Henk Jan Elbert (VVCR Europe)

**UNTIL THE WORLD IS MADE OF FOAM...**

**...WE COACH PROFESSIONAL DRIVING!**

**DRIVE SAFE. DRIVE GREEN.**

2. Advertising

**ecomobiel® 2013**

**Dé vakbeurs voor duurzame mobiliteit**

AHOV Rotterdam
8 & 9 oktober 2013

**Daag uw organisatie uit!**

**Fries SAFE & Eco Driving Program**

*Notice to the reader: This document is designed to be visually impactful and informative.*
Poland | MARKETING EXAMPLES

1. Leaflets

2. Website

3. Presentation

4. Cars

5. Ecowill weekend

6. Certificate for participation
5 Discussion & Implications

In general, the countries with less ecodriving experience provided fully subsidised training free for customers as their focus was on creating a national database of SDT results that could then be used to promote SDT nationally. This was a sensible approach that had been envisaged in the original project proposal since national experience and evidence tends to be more effective and influential with policy makers than relying on and quoting international experience. Indeed this approach already appears to be paying off in at least one country because as a direct result of the Croatian ECOWILL campaign the national Government has agreed to fund ecodriving with a target of training 51,000 drivers by 2016.

In contrast, the countries with more ecodriving experience tended to use ECOWILL’s training targets as an opportunity to try to establish relationships or test models of training that could be replicated in high volume. For Germany, this meant providing SDT free of charge for a wide range of policy makers, influencers and decision makers. For Austria, Finland and the Netherlands it meant selling most of their SDT at unsubsidised rates on the grounds that ecodriving will never become truly mass market unless a successful commercial model can be demonstrated. The UK also ran a pilot project to test a model of training that, had it been successful, would have been sustainable as it required no subsidy: EST carried out direct mailing to several thousand existing contacts and carried out effective PR work in two geographical areas, and trained 35 local instructors who were encouraged to sell unsubsidised SDT. However despite achieving considerable local media and radio coverage this pilot project trained fewer than 50 drivers during its six month trial.

In general, most partners found targeting fleets was more effective than private drivers. This was partly for practical reasons because one fleet manager can potentially sign up hundreds or even thousands of drivers, but also for other reasons including that fleets are more familiar with the concept of driver training for experienced drivers, they might be interested in the safety benefits in order to maintain their ‘Duty of Care’ and they might be more likely to take a rational approach to fuel savings. Two countries did achieve reasonable success persuading private drivers to pay for training: Greece found a good market targeting learner drivers and Poland also sold part-subsidised training to private drivers.

Several partners, including the two countries – Netherlands and UK – that sold most training during the project found that traditional sales work, particularly telephone sales, was more effective than marketing activities.

One of the key findings of the project is that it is difficult to market and sell ecodriving training unless it is free, whether to fleet or private drivers. A huge amount of effort and enthusiasm went into making thirteen diverse and impressive marketing campaigns, and the project met its overall training target, but no partners have yet found the sort of interest or reported gathering momentum that seems likely to see thousands of trainees transform into hundreds of thousands. Indeed several partners reported that they didn’t think any of their marketing activities were very successful. Even those partners that are relatively optimistic about future training plans estimate sales of only a few thousand drivers per year.
The difficulty in marketing and selling ECOWILL SDT is no reflection on the model of ecodriving training developed by the project. Indeed all thirteen partners report that trainer feedback on the format of the training was largely or entirely positive and feedback from drivers has also been overwhelmingly positive. More fundamentally it appears to be difficult to persuade large numbers of people to pay for stand-alone ecodriving training. This experience mirrors that of other organisations, including both the AA and the Institute of Advanced Motorists in the UK.

Implications
If it is difficult to persuade people to pay for stand-alone ecodriving training, then perhaps future projects and initiatives should consider other approaches. Some suggestions are discussed below:

Promoting ecodriving in driving tests. Several partners report that they consider more progress is likely to be made in the future by concentrating on activities to promote a greater prominence of ecodriving in driving tests (ECOWILL WP7 type activities). In Austria, for example, this was clear even during the life of the project so AEA switched some of their efforts accordingly.

Incorporated in to other driver training. Fleet driver training is a well-established and major business, focussing primarily on safety. So perhaps more work should be done to encourage ecodriving to be incorporated into the kind of safety-focused training that does sell. To some extent VVCR in the Netherlands pursued this approach in ECOWILL, selling ECOWILL SDT in conjunction with other training in order to meet fleets’ wider training needs.

Funding by third-parties. Given that ecodriving reduces accident rates there is a good reason to seek funding for training from insurance companies. This has been tried before and experience shows that insurance companies may be reluctant to get involved, but securing an effective partnership with an insurance company funding training remains an attractive, if often elusive, option. Leasing companies might also fund training for their clients and this approach has had some success in the UK.

Mandated for drivers seeking to regain their licences. In Italy one approach was to try to combine ECOWILL SDT with obligatory training for drivers seeking to regain their licences after losing them due to motoring offences. This approach did not work in Italy but exploring this idea further might merit further investigation.

Embedded into organisations’ processes. Another option is to seek to get ecodriving training embedded into company processes. For example, as part of general induction training for new employees, in conjunction with vehicle purchasing, or relating to companies’ environmental policies. This approach was suggested by Motiva in Finland and is also being investigated in the UK, where EST is in discussion with a large construction company about ECOWILL SDT becoming a requirement for their new starters.