

Social Marketing 101

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PECO Net Quarterly Meeting

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Definition

- ▶ Influencing public behaviors for good



How it differs from . . .

- ▶ **Commercial Sector Marketing**
 - Typically goods and services
 - For a profit
 - Benefit of shareholders
- ▶ **Non-Profit Marketing**
 - Promoting services of the organization
 - Supporting fundraising
- ▶ **Education**
 - Education typically just informs
 - Social Marketing – intent on influencing behavior change
- ▶ **Social Media**
 - Tool of marketing i.e. facebook, twitter, linked in, etc.

It's all about behaviors . . .

- ▶ Eat 5 fruits and vegetables a day.
- ▶ Move right for sirens and lights.
- ▶ Exercise 30 minutes, 5X a week.
- ▶ Don't idle more than 10 seconds, except when in traffic.
- ▶ Plant native plants.
- ▶ Wash cars at a commercial car wash.



Exchange Theory

- ▶ In order for change to happen, costs must equal benefits.



Two Social Marketing Models

- ▶ Nancy Lee: Marketing focused “social marketing”
- ▶ Doug McKenzie–Mohr: Social science focus “community based social marketing”

Social Marketing Steps

▶ Simple 10 step process

1. Purpose & Focus
2. Analyze Situation
3. Select Target Audience
4. Behavior Objective & Goals
5. Identify Barriers & Benefits
6. Positioning Statement
7. Product, Price, Place, Promotion
8. Evaluation Plan
9. Budgets & Find Funding
10. Implementation Plan



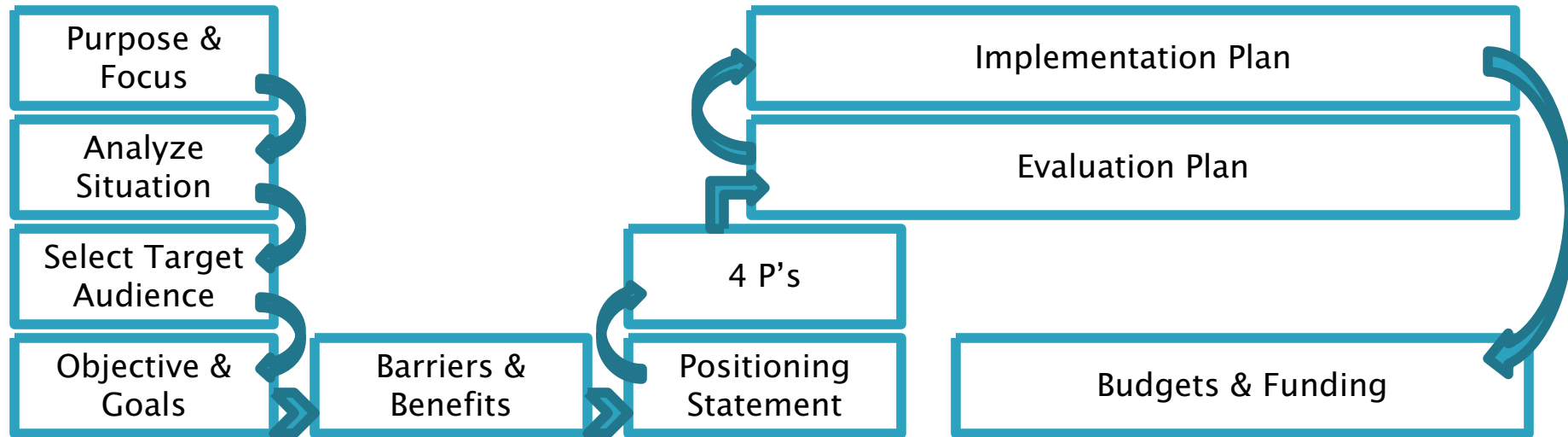
Community Based Social Marketing Steps

- ▶ Select Behaviors
- ▶ Uncover Barriers and Benefits
- ▶ Develop Strategy
- ▶ Pilot Strategy
- ▶ Implement Broadly and Evaluate

The two approaches work well together.



Using Both Approaches



Select Behaviors

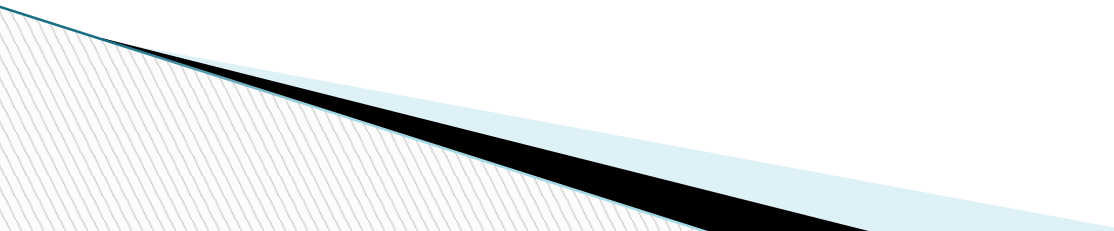
Uncover Barriers & Benefits

Develop Strategy

Pilot Strategy

Implement Broadly & Evaluate

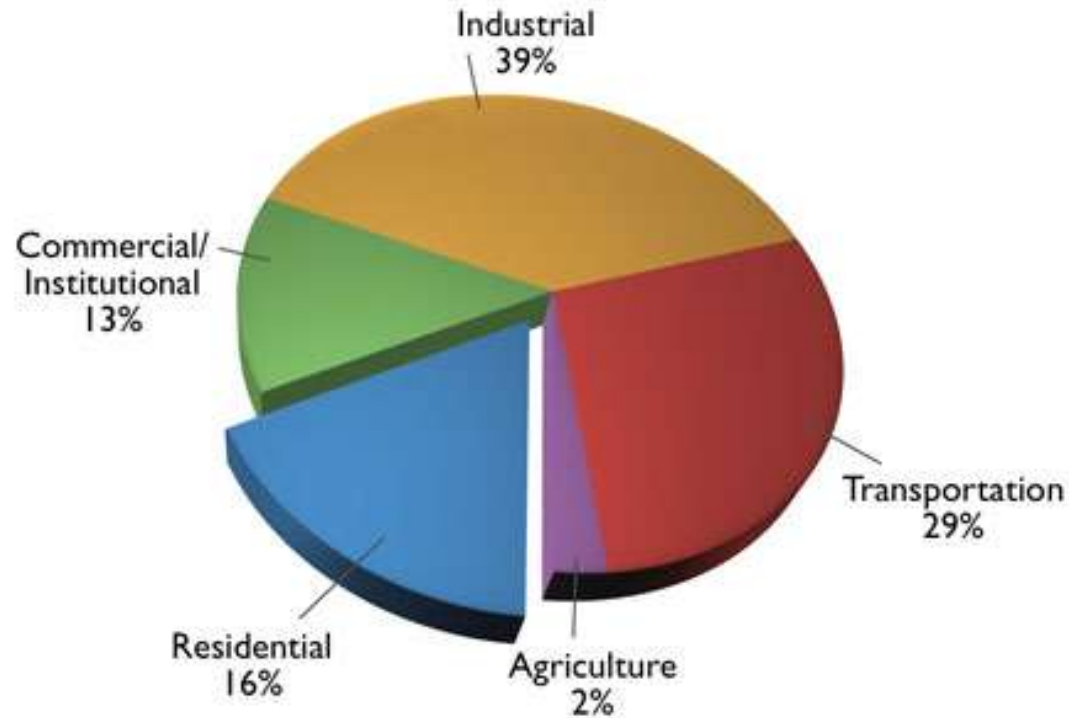
1. Purpose and focus

- ▶ **Purpose**: What is the potential impact of a successful campaign on some social issue?
 - ▶ **Focus**: What approach will you use that will contribute to the plan's purpose?
 - ▶ Choose a focus that will have an impact on your plan's purpose.
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Examples: Purpose and focus

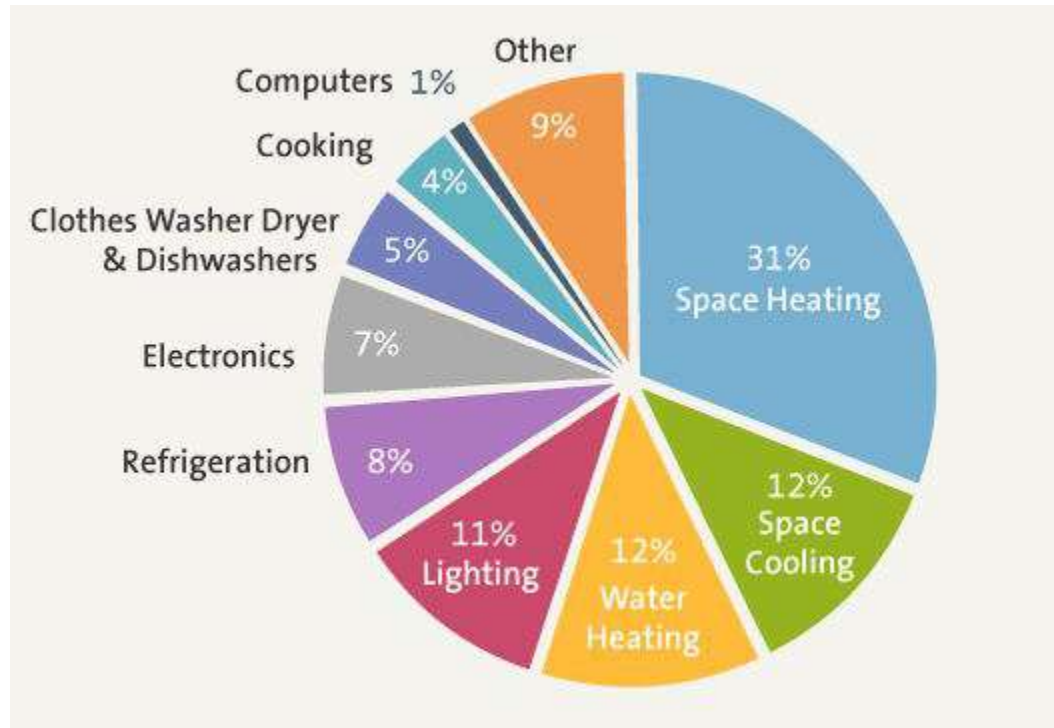
Issue	Purpose	Options for Focus
Family planning	Decrease teen pregnancies	<ul style="list-style-type: none">• Birth control• Abstinence
Traffic injuries	Decrease drinking and driving	<ul style="list-style-type: none">• Use designated drivers• Under aged drinking
Air pollution	Reduce fuel emissions	<ul style="list-style-type: none">• Carpooling• Use of mass transit
Energy conservation	Decrease household energy consumption	<ul style="list-style-type: none">• Water heaters• Light bulbs• Insulation
Flooding	Increase preparedness	<ul style="list-style-type: none">• Evacuation routes• Build emergency kits• Buy flood insurance

Example: Energy Usage



Energy usage by sector in
Canada 1990–2007

Example: Energy Usage

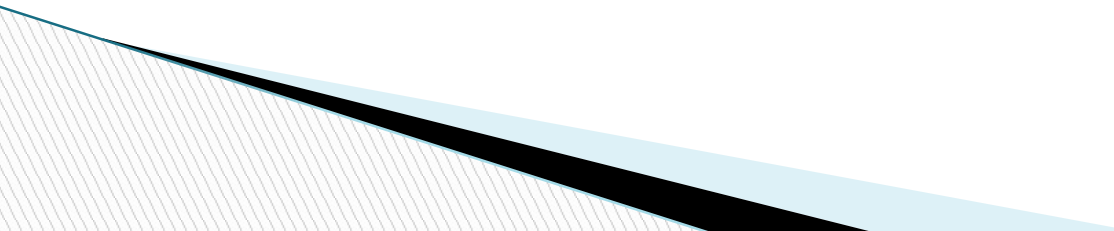


Approximate Household
Energy Use by Type

2. Analyze situation

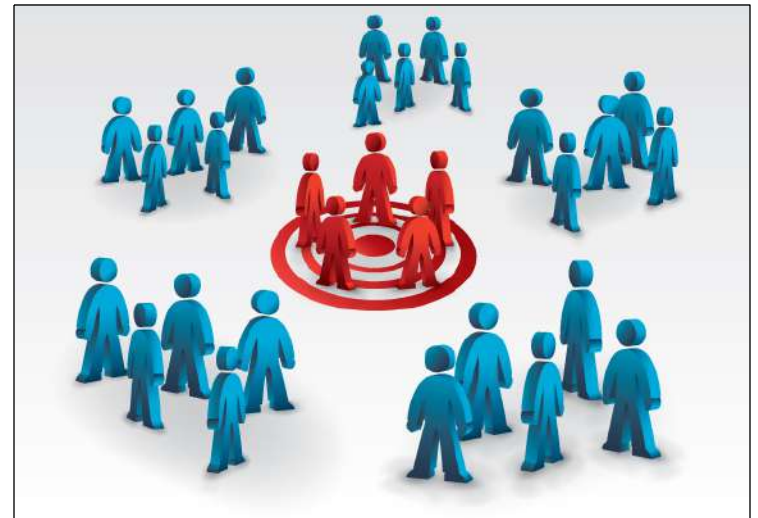
- ▶ Assemble a team to fill out SWOT
 - **Internal factors:** Resources, Expertise, Management Support, Past Performance
 - Strengths to maximize
 - Weaknesses to minimize
 - **External factors:** Cultural, Socioeconomic, Economic, Political/Legal, External Publics
 - Opportunities to take advantage of
 - Threats to prepare for (not the same as barriers)
- ▶ Take advantage of what has been done before, and has been proven to work!

3. Select target audience

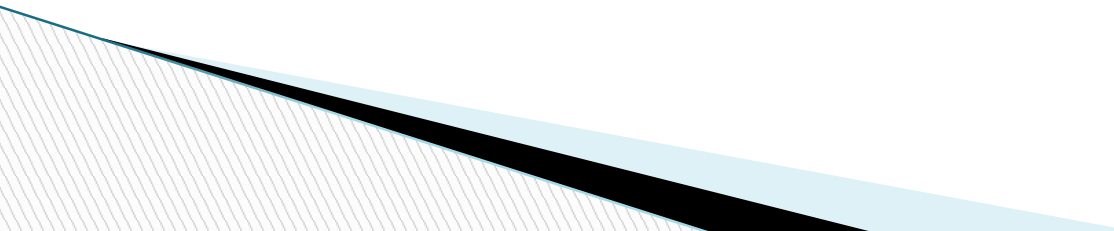
- ▶ **Target audience:** A set of buyers sharing common characteristics that an organization decides to serve.
 - ▶ Choose the audience most ready for action
 - ▶ **Three steps:**
 1. Segment market
 2. Evaluate segments
 3. Select a target that makes sense
- 

Benefits of targeting

- ▶ **Increased Effectiveness**
 - Strategies designed to address a market's unique needs, wants
- ▶ **Increased Efficiencies**
 - Higher response creates lower cost per sale
- ▶ **Helps Allocate Resources**
 - Evaluation of markets
- ▶ **Helps Develop Strategies**
 - Detailed profiles provide rich insights



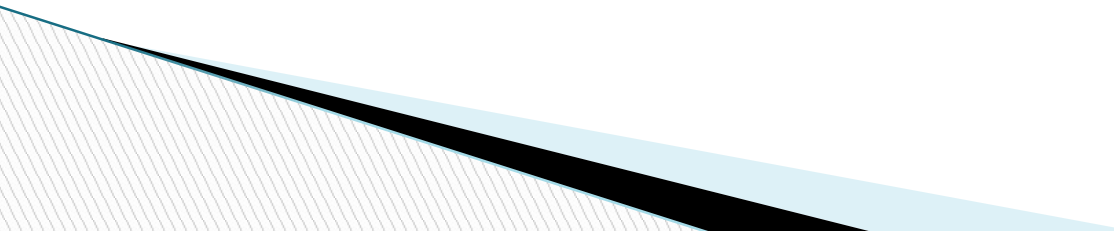
Ways to segment audiences

- ▶ **Demographics**
 - Age
 - Income
 - Gender
 - Education
 - Household composition
 - Cultural and ethnic differences
 - ▶ **Geographics (Where live, work)**
 - ▶ **Psychographics (Values & Lifestyle)**
 - ▶ **Behaviors**
 - ▶ **Benefits Sought (Looking good vs. health)**
 - ▶ **Readiness to Act**
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Segments: Seeds, sprouts, greens

Seeds	Sprouts	Greens
Don't have the value or the behavior	Have the value, but not the behavior	Have the value and the behavior
"And I'm not likely to!"	"I am interested, but have barriers and lack motivation."	"Just tell me what to do next."
<ul style="list-style-type: none">• Give them the facts• Surround them	<ul style="list-style-type: none">• Remove barriers• Offer incentives	<ul style="list-style-type: none">• Reward them

4. Behavior change objective and goals

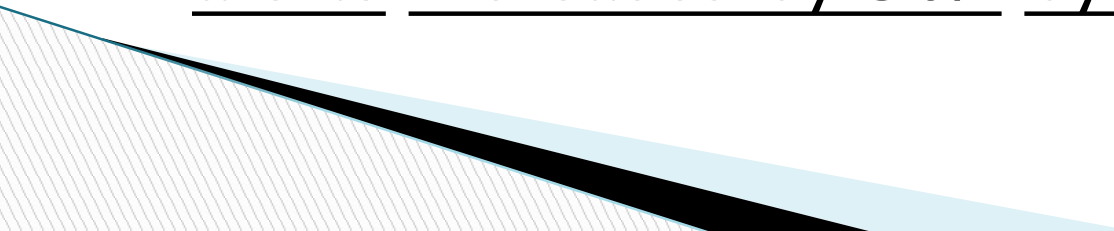
- ▶ Behavior objective: What we want our target audience to **do**.
 - ▶ S.M.A.R.T. goals: Quantifying behavior objectives
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Timebound
 - ▶ Promote a single, doable behavior.
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Choosing a behavior objective

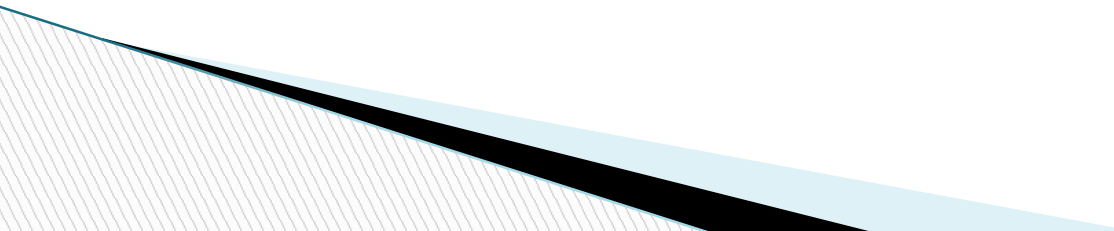
- ▶ Rank behavior objectives and choose one
- ▶ Behavior objectives should be non-divisible

LAWN AND GARDEN	VEHICLE	PET
<ul style="list-style-type: none">#3 Fertilize Sparingly#6 Spot Treat vs. Broad Application#7 Compost Mulch#9 Rain Garden#11 Maintain Tree Cover#12 Improve Soil#14 Reduce Lawn#18 Hand Pull Weeks	<ul style="list-style-type: none">#2 Use Commercial Car Wash#4 Regular Auto Maintenance#5 Wash Car On Pervious Surface#8 Dispose used fluid properly#10 Advocate for dry wipes at charity car washes#13 Choose alternative transportation#17 Cardboard test for oil leaks	<ul style="list-style-type: none">#1 Pick Up Pet Waste

Setting S.M.A.R.T. goals

- ▶ Number of Mercer Island homes buying Green Power from PSE increases from 160 – 460 in six months.
 - ▶ 300,000 homes in the county install a low flow toilet by the end of the year.
 - ▶ Number of apartment dwellers in the floodplain in Puyallup signed up for flood alerts increases by 30% by October.
- 

5. Identify barriers and benefits

- ▶ Barriers the target audience may face when adopting the behavior
 - Real or perceived
 - Internal or external: knowledge, beliefs, skills, infrastructure, cultural, economic, technology
 - Costs, objections, etc.
 - ▶ Benefits the target audience wants or needs that the behavior could provide
 - Intrinsic: pride, belonging, looking good
 - Extrinsic: save time, save money
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6. Positioning statement

- ▶ We want **(TARGET AUDIENCE)** to see **(DESIRED BEHAVIOR)** as **(DESCRIPTIVE PHRASE)**
- ▶ Example: We want **rail commuters** to see **taking the stairs** as **more fun than the escalator**.



Check-in: Social Marketing vs. Community Based Social Marketing

- ▶ 4 Ps – traditional marketing strategy, may not apply to all social campaigns

Specific Behavior	Barriers	Benefits
Encourage	↓	↑
Discourage	↑	↓

7. Marketing toolbox

- ▶ Use 4 P's to overcome barriers and provide benefits:
 1. Product
 2. Price
 3. Place
 4. Promotion



Product

▶ CORE PRODUCT

- What potential benefits are stressed

▶ ACTUAL PRODUCT

- Specific behavior (e.g., Eat 5 A Day)
- Name associated with behavior
- Sponsors and endorsements

▶ AUGMENTED PRODUCT

- Any new accompanying services or enhancements
 - Any new tangible product or improvements
 - Provides encouragement to adopt behavior
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Product examples

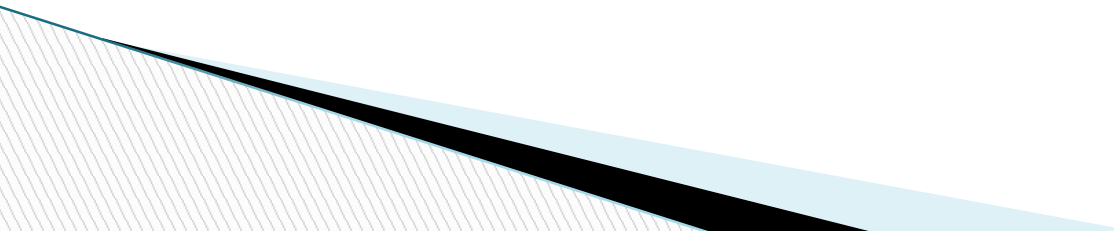
Core Product	Actual Product	Augmented Product
Prevention of falls among seniors	Exercise classes	Calendar or daily exercises
Healthy pets	Organic fertilizer	Magnifying glass attached to fertilizer container
Having a low-maintenance yard	Native plants	Guide to beautiful native plants
Save money on energy bills	Home energy audit	Findings from the audit with savings on specific retrofits recommended

Price

- ▶ Look for a price that really matters.
- ▶ Monetary incentives: discount
- ▶ Monetary disincentives: fine
- ▶ Non-monetary incentives: recognition
- ▶ Non-monetary disincentives: shaming



Place

- ▶ Make access convenient to target audience.
 - ▶ Where the market will:
 - Perform the behavior
 - Acquire tangible objects
 - Receive services
 - ▶ Components:
 - Physical location and its ambiance
 - Remote access
 - Days of the week available
 - Hours available
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Promotion

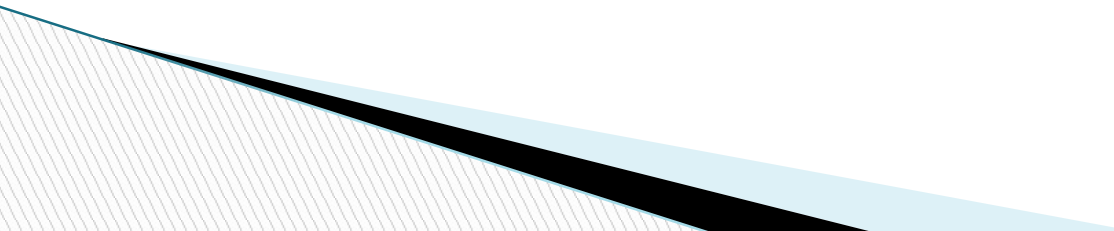
- ▶ Persuasive communications designed and delivered to highlight product, price, place.
- ▶ Components:
 - **Message:** What you want to communicate
 - **Messengers:** Who will deliver the message
 - **Communication channels:** Where you will communicate the message



Case study: Food waste in Portland

Product	Price	Place	Promotion
<p>Core product: Save money on disposal by donating food</p> <p>Actual product: Food donation program</p> <p>Augmented product: Convenient pick-up by food bank chosen by the business</p>	<p>Monetary incentive: Reduce disposal fees by significant reduction in waste.</p> <p>Non-monetary incentive: Local recognition program for participating businesses.</p>	<p>Online registration</p> <p>Businesses choose the food bank their food goes to</p> <p>Food banks provide regular pick-up times for food</p> <p>Instruction on packaging food for pick-up standardized</p>	<p>Promotion carried out by partners:</p> <ul style="list-style-type: none"> • Restaurant Association • Local chefs • Food Bank • 3 Counties • 25 cities • Food Alliance

8. Evaluation plan

- ▶ Determining a plan for monitoring and evaluation answering the questions:
 - Why?
 - What?
 - How?
 - When?
 - How Much?
 - ▶ Monitor throughout the process
 - ▶ Evaluate when the project is complete
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Evaluation plan

- ▶ Think about who you are evaluating for when developing your evaluation plan
 - Grant Requirement
 - Do Better Next Time
 - Support Continued Funding

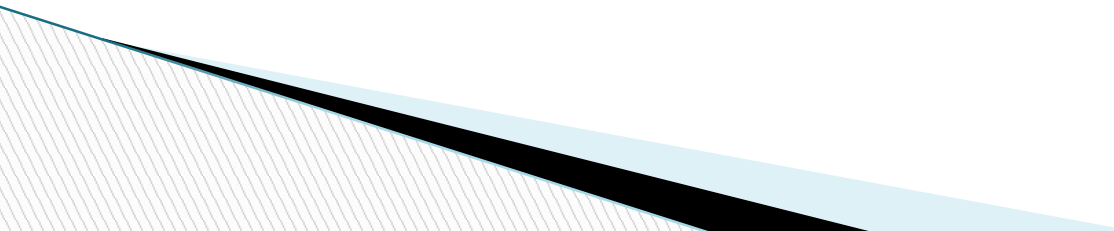
Evaluation logic model

The Basics		The Real Difference		
Inputs	Outputs	Outcomes	Impacts	Return on Investment
Resources allocated to the campaign	Activities conducted to influence behavior	Audience response to outputs	Indicators that show level of impact on the social issue that was the focus of the campaign	Economic value of changes in behavior and the calculated rate of return on the spending associated with the effort

Case study: Food waste in Portland

The Basics		The Real Difference		
Inputs	Outputs	Outcomes	Impacts	Return on Investment
Campaign admin / coordination 1999–2005: \$700,000	Partnerships Sign-up program Food waste pick-up program	1999–2005 18 million pounds of food donated	Savings for food donors of \$650,000 on disposal Food donated worth \$17 million	For every dollar invested, there was a \$31 benefit

9. Budget and funding

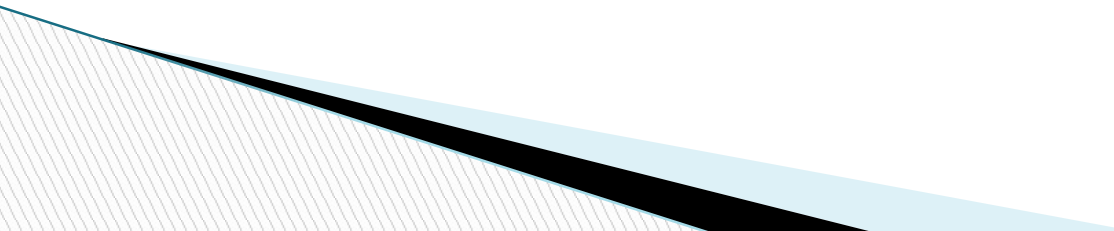
- ▶ Budgeting comes after developing evaluation plan to ensure evaluation is included
 - ▶ Develop a budget based on the entire plan first.
 - ▶ If budget exceeds available funding:
 - Reduce by eliminating least effective strategies
 - Pilot program to prove effectiveness, then request increased funding when strategy is proven
 - Look for partnership opportunities
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10. Implementation plan

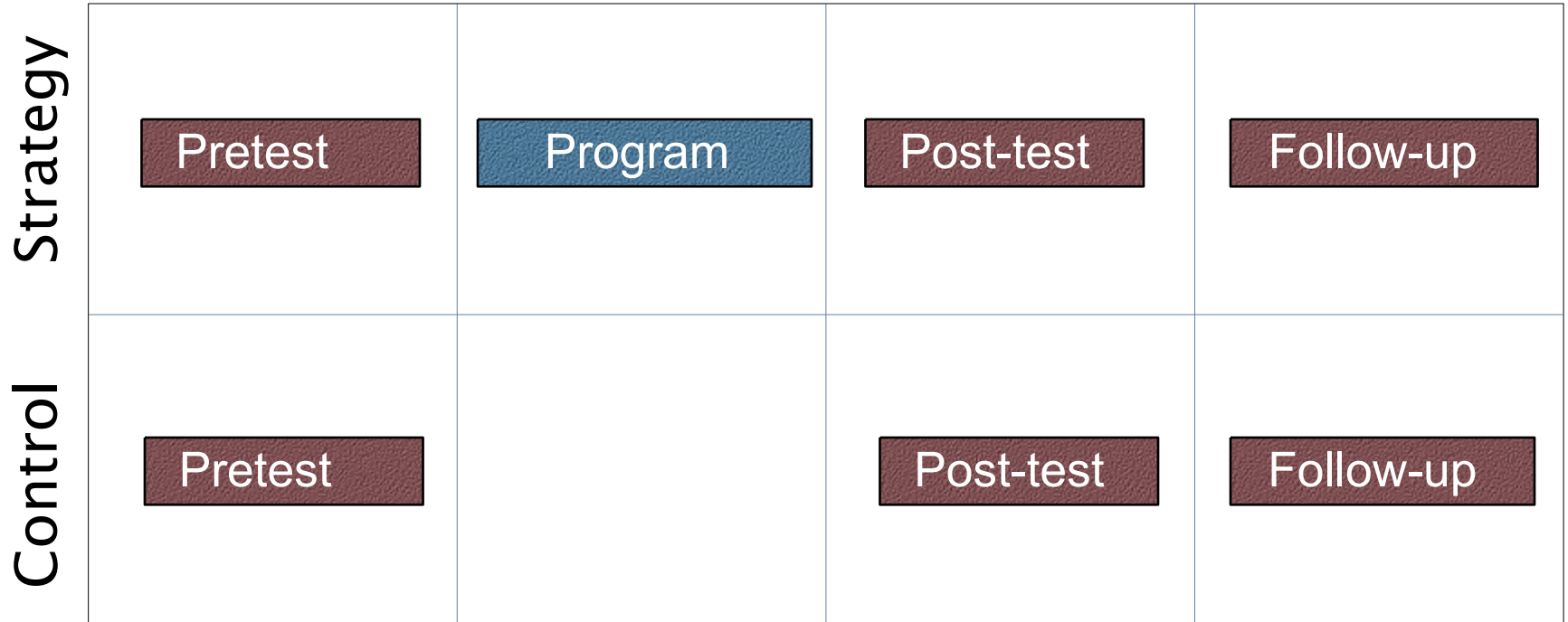
- ▶ What will we do?
- ▶ When will we do it?
- ▶ Who will be responsible?
- ▶ Ideally 2–3 years
- ▶ Sustainability: If you want the behavior to last longer than your implementation window, include a plan to sustain behavior change.



Pilot Your Program

- ▶ Random Selection: Obtain participants that are representative of your target audience
 - ▶ Random Assignment: Use a control group to ensure that results you see were attributable to your program
 - ▶ Make changes to your program based on the result of your pilot before making a large investment!
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Pilot Strategy



Time

Recommendations

- ▶ To ensure a social marketing approach:
 1. Prioritize behaviors
 2. Select a single, end-state behavior
 3. Identify barriers and benefits
 4. Pilot strategies
 5. Evaluate your program's actual impact



Discussion

