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PUMP

THE MARKETING/SOCIAL MARKETING HYBRID APPROACH

Theory and Case Reviews from
EnterpriseWorks/VITA Projects







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ABOUT THE MANUAL

This manual is designed to introduce practitioners to the “Fighting Poverty with Profit” approach. It is based on 20 years of experience of EWW staff and our partners in the field.

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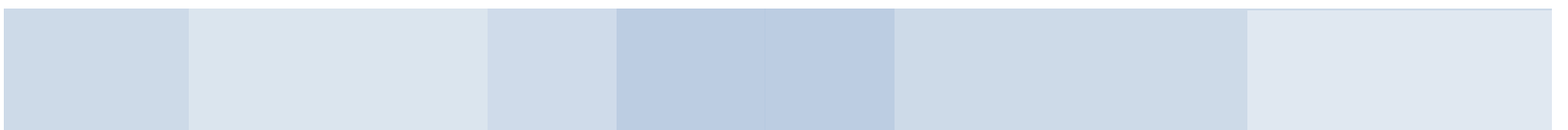


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I. THE MARKETING-SOCIAL MARKETING CONNECTION

People tend to use the words “selling” and “marketing” interchangeably, but being a salesman is a far different experience than being a marketer. Marketing is much more than selling. It is more of a creative industry that uses methods of advertising, communication tools, product development and distribution as well as selling. Marketers anticipate a customer’s wants and future needs through market research and create processes according to times and culture that appeal to that consumer. Marketing is influenced by many of the social sciences such as economics, psychology and sociology. Marketers study human behavior and plan their strategies and tactics that both create and maintain a relationship or emotional bond with their customer. This relationship adds value to both the customer and the marketer. A strategy is the direction the marketer’s efforts are directed over a period of time while the tactic is the actual decisions or steps that are used to implement the strategy. The perfect marketing strategy is one that not only wins a new customer, but creates loyalty to a long term relationship. It is costly to gain a new customer, and the intent is, once earned, the marketer retains that customer as a business partner. In a social marketing realm, that customer becomes an advocate or spokesman for the product or service.

SOCIAL MARKETING DEFINED

In 1961, Keep America Beautiful partnered with the Ad Council to create a campaign dramatizing how litter and other forms of pollution were hurting the environment and that every individual has the responsibility to help protect it. The goal of the campaign was to help fight the negative attitudes and behaviors that lead to pollution.

The anti-litter campaign originally featured “Suzy Spotless” scolding her litterbug father and later featured pigs rummaging through trash left behind by humans. In 1970, the Keep America Beautiful toll-free hotline began offering a free brochure, and more than 100,000 copies were requested within the first four months. On top of that, the National Litter Index dropped for the second straight year. However, it wasn’t until later that the Pollution Prevention campaign became embedded in American culture.

During the late ‘60s and early ‘70s a cultural and political shift was taking place in the United States. A large number of American citizens were becoming outraged by environmental pollution being caused by large multi-national corporations and individual citizens alike. During that period of time a new U.S. government agencies, the United States Environmental Protection Agency, was formed, and sweeping environmental protection legislation was being drafted.

On Earth Day, 1971, a public service announcement featuring Native American actor Chief Iron Eyes Cody and the tagline line, “People Start Pollution. People can stop it.” aired for the first time. Iron Eyes Cody became synonymous with environmental concern and achieved lasting fame as, “The Crying Indian.” The PSA won two prestigious television advertising “Clio” awards and the campaign was named one of the top 100 advertising campaigns of the 20th Century by Advertising Age Magazine. The “Clio” Award is the most recognized global award competition for advertising.

*“Human behavior flows from three main sources: desire, emotion, and knowledge,”
-Plato (428 BC - 348 BC)*

During the height of the campaign, Keep America Beautiful reported receiving more than 2,000 letters a month from people wanting to join their local team. By the end of the campaign, Keep America Beautiful local teams had helped to reduce litter by as much as 88% in 300 communities, 38 states, and several countries. The success of the Keep America Beautiful anti-litter campaign led to hundreds of other environmental messages through the years, from many different sources, including the Ad Council.*

Essentially the Keep America Beautiful campaign was a social marketing campaign. However, nobody knew to refer to it as such. The term social marketing was coined that same year Phillip Kotler and Gerald Zaltman.[†] Social marketing uses many of the principles of commercial marketing to bring about behavior change. However, rather than being product oriented, social marketing is people oriented. Put simply, social marketers sell positive behaviors.

IMPREGNATED MOSQUITO NET PROJECT FOR MALARIA PREVENTION

Each year 350-500 million cases of malaria lead to more than one million deaths, mostly of African children. In 1995, Population Services Incorporated (PSI) a leader in international social marketing efforts in health care issues, started the first social marketing impregnated mosquito net (IMN) project for malaria prevention with the branded bednet, FA NGOUNGOU, (Kill the Mosquitos!). The effort was piloted in Kenya and Ghana. PSI started the project with the premise—backed up by World Health Organization studies—that mosquito nets treated with insecticide can reduce childhood mortality by as much as one-third in malaria-ridden parts of Africa while limiting pesticide residue exposure. The results of the two trials showed that mortality among children ages one month to six years fell by 30% in Kenya and 17% in Ghana.

This innovative private sector program—implemented by PSI in collaboration with the Central African Republic’s Ministry of Health and Population, and funded by USAID and the World Health Organization—has reduced malaria-related death and disease, particularly among children. The project has been successful in assuring that those in danger of malaria are getting the nets and also establishing an accessible net retreatment service. The nets are sold at low prices so they are affordable to lower-income people.

Social marketing campaigns often market only behaviors, not specific commercial products that combine with a behavior change or new action to improve the well-being of individuals or society. This manual will focus on social marketing efforts that use a hybrid marketing-social marketing approach; marketing a product that achieves a social goal such as reducing Malaria-caused deaths in children.

INTEGRATED MARKETING COMMUNICATION (THE MARKETING MIX)

It isn’t enough to create a quality product and compelling commercial and social reasons to use the product. The message and information about the product and the good it can do for individuals and

* The Ad Council website: <http://www.adcouncil.org/default.aspx?id=132>

[†] Kotler, Philip and Gerald Zaltman (1971), “Social Marketing: An Approach to Planned Social Change,” *Journal of Marketing*, Vol. 35 (July), 3-12.

society must reach potential customers. Commercial marketing and social marketing professionals use marketing research techniques to segment audiences; learn about their knowledge, attitudes and practices related to a product or behavior; and they use marketing research to test potential messages. Audience research is also useful in determining the best mix of mediums or channels to use to get the message to consumers. The marketing mix, or media mix, can range from very local community-based approaches such as demonstrations and educational displays, to large mass media advertising on television and radio. The exact mix of public relations, interpersonal communications, selling techniques, advertising, etc, will vary from campaign to campaign, and is impacted not only by the audience, but also by the product or behavior you are marketing and the budget constraints under which you are operating.

SOCIAL MARKETING BASICS

Social marketing consists of several basic components, including: exchange, positioning, focusing on behaviors, understanding the target audience, identifying barriers and benefits, creating and delivering messages that will prompt people to change certain behaviors, and forming strategic partnerships with community resources. While later chapters of this guide will cover these key components in more detail, below are some brief explanations of many of the important elements of social marketing campaigns.

Exchange

At the core of any social marketing “package” is the principle of exchange.* Exchange is the act of giving something and getting something in return. The exchange is either equal or reasonable enough that both parties come away from the transaction satisfied. In commercial marketing, exchange could be described in terms of the purchase. One party offers \$1.00, the other party offers a can of soda pop. The goal of that exchange is that both parties will walk away satisfied. In social marketing terms, behaviors are usually the exchange currency. The challenge for social marketers is to present the new behavior in a positive way. How can you reduce the barriers to change and maximize the benefits to adopting a new behavior? That is what makes social marketing more challenging than commercial marketing.

Behavior or Action

Keep the action or behavior you want to promote simple and singular (KISS referring to Keep it Short and Simple). KISS your audience by giving them one practical step that they can do now. There is nothing like a little success to motivate people to take the next step. Nutrition and fitness experts, for example, tell people who want to lose weight and get into better physical condition to start slow. Set your goals at an achievable level. As you use the hybrid marketing-social marketing approach, the first, simple action you will promote to consumers is purchasing the product, whether it be a water filter, manual water pump, hand drilled well, improved stove, etc. But the purchase alone will not improve the health, productivity or overall quality of the life of the consumer. It is critical that the consumer knows how to operate the product correctly in order for your project to achieve the social benefit you seek.

* Made To Stick, Chip & Dan Heath, Random House Adult Trade Publishing Group ISBN-13: 9781400064281 (2007)

Audience

There is never only one audience. Even if you are trying to reach 100 households in one small geographic area, you probably will want to break down your audience into even smaller subsets of people with common characteristics. In many of your projects you may find that villagers or members of a community can be considered one audience—the end users. Your audience segments may need to be government officials, sponsors and end users. The more your audience has in common with one another, the more on target you can be with your message. It is impossible to be everything to everyone in one message. You need to be targeted to be effective. Here are a few ways to segment your audience:Age

- » Gender
- » Ethnicity
- » Location (geography)
- » Socio-economic level (income)
- » Religious affiliation
- » Social affiliations
- » Hobbies
- » Political affiliation
- » Time in the community (length of residence)
- » Employment (employer or vocation)
- » Habits (smoker, community volunteer, athlete, activist, etc)
- » Relationship to the project
- » Government officials
- » Sponsors (funding sources)
- » End users



Sometimes within an audience segment you will find an opinion leader or change agent. A respected member of a community or expert in a specific field can be a good person to initially target with a product or behavior you are marketing. Many times it is easy to identify these people as you conduct audience research.

Audience research consists of quantitative (measured properly) and qualitative (studies of human nature or reasons for behaviors) methods to learn about targeted audiences. Using background data such as census statistics, and primary research including surveys, observation, personal interviews and focus groups, researchers try to identify their audience's current behaviors, the barriers to changing behavior, the factors that may motivate people to change, and the best media channels, approaches and messages to use to reach the audience.

Branding

Part of a person's quality of life depends upon a sense of belonging. Humans are social creatures. We build relationships, many that last for a long time. People make assessments of others, some drawing them to a relationship, and others deter them from further engagement. What are the reasons for not being interested in some individuals? We may not be aware of the reasons, but that awareness or interaction is the root of brand loyalty. The method of creating a feeling of belonging,

dependability, loyalty or even friendship is at the root of creating a brand. Brands that create or generate the greatest sense of belonging or family identity are significant to the wants and needs of the customer. We cannot however buy loyalty or friendship. There is the old adage that to have a friend, we must be one. Brands that we adopt give us a sense of familiarity and comfort.

In the case of the insecticide treated bednet project mentioned earlier, research conducted by PSI resulted in the marketing of a green polyester net with the brand name, FA NGOUNGOU (kill the mosquitos!), which retails at a price of 1,500 FCFA (the equivalent of \$3.00), an amount lower-income families can afford. The nets are sold to consumers by local merchants and village committees. As evidence of FA NGOUNGOU's popularity, all 12,000 nets have been sold out among the 4,000 households in Bossembele. A re-treatment service called "**Zingo Moustiquaire**," meaning "**Come Alive, Mosquito Net**", has been started. Trained re-treatment agents man Zingo kiosks which have been erected in areas of high consumer activity. Additional agents perform roving door-to-door re-treatment services on bicycles equipped with bucket, insecticide and measuring cups.

While the re-treatment phase of the project is in its infancy, to date 14% of the target population has retreated their net. Consumers are bringing their own nets to be re-dipped, which is evidence that the message is reaching its audience, and that the audience believes in the product and what it can do for them. In this case, project sponsors used two separate brands for the nets themselves and the re-treatment service. In both cases, however, the brand names were researched with members of the local target audiences. Brands were chosen that are meaningful to the target audience. This is a critical element of successful branding.

During the 60's, there was a demand for cars that were powerful. This was called the "Muscle Car Era". The need for speed as well as beauty was the norm. The Ford Mustang was introduced. The mental image of the wild mustang running wild across the desert with its mane a tail flowing in the wind exhibits speed and durability as well as the rugged wild west . The car not only had a powerful engine, but the style was unique and beautiful. The car became an instant success for Ford. The car was fairly dependable, versatile and built to accelerate from 0-60 in under 6 seconds. There was the ever popular European Jaguar representing speed, sleekness and cat like grace. People developed a relationship with their car. The idea was to pick a logo, symbol, icon, image, slogan, jingle or other style that sets your product or company as unique or recognizable. This unique symbol becomes the consistent part of the marketing strategy. As with the mustang, seeing the icon immediately brings to mind Ford, and the image of a powerful car built for speed or the Jaguar implants the sleek European automobile that is not only fast and powerful, but luxurious and expensive.



Building a brand is not as simple as choosing an icon or symbol. The most important part of branding describes how the product or service is relevant to the wants and needs of the consumer. Why is this product important to me, and how can that product better my life? In the bednet example above, the bednets were branded FA NGOUNGOU (kill the mosquitos!). This is meaningful to the target audience or target market. It is easy for the consumer to immediately understand why the product is important and why it will better his or her life. The treadle water pump logo below tells a meaningful story with a picture. It shows what the pump looks like, a great deal of water is flowing out of the pump, and the pump is surrounded by attractive fruits and vegetables, which is the result of using the pump.

In creating the brand, it is important to develop expectations of the product or service. There are qualities or characteristics that make the brand unique and special. The brand creates the advertising theme and describes what the product or service offers to deliver. A goal in brand recognition is that the product or service is recognized even if the company is not present. When we see the words Land Rover or Range Rover, we think of a vehicle navigating vast expanses of land on safari. We think of power and strength.

We have talked about the need to create a friendship or relationship through branding, but that is not enough. A brand then must be dependable and give the same quality and service in a consistent manner. Quality and dependability takes time to acquire and is not an overnight success.

The more we interact with a product or service, the higher the level of awareness we have of that company. Companies with strong brands understand the necessity of friendship, belonging, dependability and a strong sense of customer loyalty. A brand does not compromise these characteristics and realizes the time and energy that has been exerted to create this loyalty.

Messages

Marketing messages are designed to motivate people toward choosing one product or brand over another. Or, in the case of social marketing marketers want people to choose a new and healthier behavior or action. The new behavior may improve their personal health or well-being, or the health or well-being of society. These messages are spread through the most appropriate media channels available to the sponsor organization.

The social marketing message must do three things to be effective. First, it must capture the attention of the audience. This alone is no easy task in a world saturated with media messages. Somehow, your message needs to cut through the din of information and stimuli that bombards us every day.

Messages Must Do Three Things:

- » Capture the attention of the audience.
- » Be meaningful in their daily lives.
- » Be short simple and singular.

Next, the message has to be meaningful in the daily lives of the target audience. It needs to be meaningful from their perspective, not yours. The opinions of the sponsors, lead workers, consultants and partner groups behind a social marketing campaign are ultimately less important than the opinions of the intended target audiences. Nobody likes to be told that their opinions are somehow less important than those of someone else. This is especially true for project sponsors and

campaign developers. These people, after all, know the material and are often the creative forces behind the messages being promoted. However, the fact of the matter is no matter how talented you are if the audience doesn't receive and act on your messages, you've failed.

Finally, keep it short, and simple (KISS). KISS your audience by giving them one practical step that they can do now. Nutrition and fitness experts, for example, tell people who want to lose weight and get into better physical condition to start slow. Set your goals at an achievable level. There



is nothing like a little success to motivate people to take the next step. This illustrated promotional message in Senegal clearly and simply explains why villagers would want to have a treadle pump.

The messages are then redistributed and reinforced through community resources at schools, public gatherings, through literature at private or government offices where people seek information about the topic, or through word of mouth. The idea of using community resources is to further support the individual in making and sustaining the behavior change. Media messages are good at shedding light on a subject. They can even move people toward behavior change. But such short, simple messages often lack the depth to help people actually make and sustain the change. If awareness of the topic is high enough and the message is simple enough, the media message should be more effective at changing behavior on its own. For example, most people understand why they shouldn't smoke or why they should wear their seat belt. The right message may provide the extra push they need to take action. In the case of smoking or seat belts, they already know what to do and they may already understand the consequences of their choice, they just need the motivation to take action. However, that level of awareness does not exist usually in water issues.

The community resource is often the venue where the messages and more in-depth information can be received by the target audiences. These can include schools, health care facilities, recreation areas, restaurants, libraries, stores, weekly markets, churches, mosques, shops, fairs, meetings, seminars and community centers.

In marketing terms, the message plus the resource equal the product. Instead of shoes or soda pop, your product, as a social marketer is the positive behavior that will improve the quality of life of the individual and/or society. In the hybrid approach, the product and the socially responsible behavior of using the product are of equal importance.

This "product" becomes part of your marketing mix, one of the 4 Ps.

When it comes to messaging, you may choose to follow the principles outlined in the 2007 book *Made to Stick*, where the authors, Chip & Dan Heath, assert that the best ideas have most of these traits: They are simple, core messages; they are unexpected; they are concrete, credible, and emotional, and they are stories.³

Using the Marketing Ps

In order to beat the competition and win your business, commercial marketing uses the five Ps: product, price, place, promotion and positioning. Most of the time social marketers talk about the four Ps. Positioning is a critical concept and technique in social marketing. However, it is often referred to in different terms, as we will discuss below.

1. **Product**—The product is what you are marketing. In social marketing the product is the behavior or set of behaviors you want your audience(s) to adopt and sustain.
2. **Price**—How much will it cost a person to take on or stop a certain behavior? In social marketing, price can mean more than just dollars and cents. In fact, money isn't even part of the price of taking on a new behavior in some cases. Often price can be applied to what is in it for me or how will this thing benefit me or my family's life.
3. **Place**—Place can include the channels through which the products or programs are available, or the places where the behavior change can occur. A product that is sold in the

next town or village—especially in more rural areas—can be too far. The ‘price’ is too high to take the time, fuel and other things necessary to go get the product that will ultimately improve your life. On the other hand, if a traveling sales van comes to my town or village, they have brought the place to purchase the product to me, which makes it easier.

4. Promotion—Promotion is how and where you communicate to your audience about the product, price and place. Simply put, promotion is the advertising you do to “sell” your “product.” There are promotion channels from the smallest, such as face to face contact, to the largest such as large market advertising. Which channel or channels will reach your audience most effectively and serve your purposes best? In social marketing the answer is usually a mix of large and small media, mass media and community-based approaches.

Positioning

Presenting your product in the best possible way compared to the competition is known as positioning. The way you “position” the behavior you are promoting is to make it somehow seem better than an existing behavior. This will go a long way to determining the success of your campaign. How can you present your product, such as a treadle pump in a way that is favorable to the alternatives that may be available? How can you position the benefit a person might gain from using the pump in a way that will overcome any potential barriers to taking action?

The following is a quick definition of product positioning from Al Ries and Jack Trout, who first coined the term in 1969:

In social marketing terms the product is usually expressed as the behavior you want people to adopt. Your competition is usually the existing or competing behavior, which is usually less healthy or socially desirable in some way. Therefore, positioning in social marketing refers to how the behavior you are promoting competes with or compares to the existing behavior.

For your projects, positioning, like every other marketing concept will be expressed in terms of both product and behavior.

THE PHASES OF A SOCIAL MARKETING CAMPAIGN

Generally speaking, social marketing campaigns include the following phases or series of steps:

- » Define the problem (e.g. the behavior you want to change),
- » Identify and segment your audience,
- » Understand your audience (the positioning strategy starts to become clear)
 - › Identify the barriers to change,
 - › Identify ways to reduce the barriers to change,
- » Select brand, messages and identify media channels
- » Pretest your branding, campaign ideas and messages,
- » Implement pilot project,
- » Evaluate your results to see if you have created the desired change,
- » Make adjustments and implement at a larger scale.

As we look at selected case studies throughout this book we will be able to see how other campaigns have approached these phases and steps of the social marketing process.

THE MARKETING – SOCIAL MARKETING HYBRID APPROACH

Social marketing campaigns seek to bring about behavior change. If the issue is largely understood by your audience, it can be challenging. For example, most people in the United States understand after years of education and awareness campaigns that wearing seatbelts while in an automobile saves lives. Yet seatbelt use and child car seat use continue to be social marketing challenges because knowledge alone does not equate to behavior change. People usually need a reason to change, an incentive. Trying to improve water delivery systems and water quality is an even greater challenge if people don't understand that their current behaviors are creating health and environmental problems.

The hybrid marketing approach provides people with concrete incentives to take action. Purchasing a manually drilled well to provide safe water for a household or village improves health. The idea that the wells are produced and supplied by local companies, improves the local economy and the ability of more workers to buy quality local products and services. Eventually, the lessons of improved economic environmental and human health should be taught and learned by the local population to increase sustainability of such programs. In the meantime, people take action because of an immediate personal benefit that they currently understand.

Learn from Examples

Throughout the course of this manual we will look at several past projects of Enterprise Works and others from various counties. Some of these will be stand alone examples, while others will be integrated into the teaching concepts. The first example below, from Niger, is intended to start you thinking of the possibilities of the marketing-social marketing hybrid approach.

MANUAL IRRIGATION PUMPS IN NIGER

The most labor intensive part of irrigated horticulture especially under the very dry conditions in Niger is lifting water for the plants. A rule of thumb is that the plants need 8-10 mm of water daily.

Enterprise Works identified three models of manual irrigation pumps (suction only treadle pump, suction-pressure treadle, and 2-cylinder hand pump) that would potentially be a good fit in Niger. The technology matched the prevailing size of gardens in Niger and the available infrastructure for manufacturing, operation and repair.

Making the project a reality required working with multiple audiences and overcoming attitudinal barriers. The government and donors were reluctant to accept manual technologies because they viewed them as backward, preferring motorized pumps. Farmers however were quick to see the benefits for them. The biggest hurdle was convincing the donor (World Bank) and the government of Niger. One comment from a government official was "first the foreigners bring ox carts and make our animals work, now they bring treadle pumps and make our farmers work." He did not realize that the treadle pump was a lot less work for the farmers. The farmers' perspective was expressed by one farmer when he asked "why did it take you so long to bring this technology to us; it is exactly what we need."

Picking a name for the product that could be branded locally was a critical part of the process. We wanted to have a product that was local that people would be proud to own. We choose words that were understood in the two major local languages in Niger (Hausa and Djerma). The brand was Niyya da Kokari and means "willingness and fortitude." We brainstormed with local staff and tried out the name out with farmers during early demonstrations and it resonated with them. It was similar in context to the name for the pump in other West African countries.

The product had been used In West Africa for a number of years and design changes were made to meet the needs of farmers. When they saw it for the very first time, most farmers were attracted by how much water it could move. We built on this feature in the publicity for TV showing the discharge from the pump and having a neighbor of the farmer exclaim, "Wow that is water!!!" The pump has other attractive features that were stressed advertising and during live demonstrations. It is easy to use, it is not expensive, it does not need fuel, repairs are simple, it is available locally. This was all put into about a two minute song.

The messages were tested during demonstrations with farmers. The messages were distributed directly through live demonstrations at market days, agricultural fairs and at gardening sites. In addition the message was aired on national TV and radio and also on both regional and rural radio. Rural radio combined the messages with interviews with users.

Refinement of messages, approach and even the product is fairly common in marketing campaigns. In this case, the pump was redesigned to make it smaller and less expensive while maintaining the same flow rate. This was done based on feedback from farmers. The new pump was named compact. There was limited promotion of the new pump because the project was winding down.

Another lesson project sponsors learned in Niger was to make the publicity entertaining. People would run to see our commercials when they heard the music come on. The attention span in Africa is much longer so using a story to get the message across works well. Comedy is really appreciated. The reach of TV is far beyond urban areas and reached to the villages. Before moving on to the next chapter, you may want to read the chapter summary, then reread the short Niger example.

CHAPTER REVIEW

Social marketing uses several successful techniques from commercial marketing, including price, product, place, promotion and positioning to bring about voluntary behavior change in the lives of individuals that can have meaningful benefits, both for those individuals and for society as a whole.

Social marketing is audience driven, whereas commercial marketing is product driven. However, segmenting, or breaking down a larger audience into small groups with common interests or backgrounds is an essential part of the commercial marketing and social marketing processes. Marketing campaigns use marketing research techniques and practices to better understand the target audience.

Effective social marketing messages must capture the attention of the target audience, be meaningful to their daily lives and must be short, simple and singular.

Chapter 1 Summary

- » Social marketing uses the Ps to bring about behavior change
- » Social marketing is audience-driven
- » Audience research is critical
- » Messages must:
 - › Capture the attention of the audience
 - › Be meaningful to their daily lives
 - › Be short, simple, and singular
- » Use marketing concepts of :
 - › Product
 - › Price
 - › Place
 - › Promotion
 - › Position
- » The phases of a campaign include:
 - › Define the problem/marketing opportunity; Identify possible solutions
 - › Assess your marketing capacity
 - › Identify and segment your audience
 - › Research your audience
 - › Identify the barriers to change
 - › Identify ways to reduce the barriers to change
 - › Select brand, messages and identify media channels
 - › Pretest your branding, campaign ideas and messages
 - › Implement pilot project
 - › Evaluate your results to see if you have created the desired change, make adjustments and implement at a larger scale

II. CASE STUDY: IMPROVED WOOD STOVES IN INDIA & GHANA

While many of you will be promoting manual drilled water wells and manual pumps, the concepts remain the same, regardless of the product being promoted, the issue being addressed or the country being served. Consider the following two examples of successfully promoting cleaner burning cook stoves.

INDIA

In two Indian States, Enterprise Works/VITA worked to introduce an improved biomass (wood) stove that was designed to reduce smoke emissions and related health problems resulting from indoor air pollution as well as reduce the fuel consumption and save money and time for women.

The stove was an excellent fit in India since most rural households still cook using wood/biomass and use wood/biomass for heating water. Gas cylinders are available but expensive and most households use them for quick cooking etc. The benefits of an improved stove were pitched at the government and society level to gain support for the production of the stoves, as well as at the individual/target audience level.

Rationale for improved cooking and heating stoves at the government and society level:

- » Reduces CO emissions by up to 70%, thereby reducing indoor air pollution and all the health related issues resulting from indoor air pollution (IAP). Globally, 1.5 million people die prematurely each year from IAP in India alone, more than 450,000 alone die annually in India from TB, pneumonia, lung cancer etc. Women and children are the most affected by smoke from wood stoves.
- » Diseases also cost money and time away from productive work

The benefits of an improved cook stove for the individual/targeted population are:

- » Less fuel - The consumption of wood can be reduced by 50% using an improved cook stove, which will save women's time involved in collecting wood as well as have a positive impact on the forests
- » Less smoke – no cough, less eye irritation
- » Faster cooking from an improved stove saves time of women
- » Cleaner pots and cleaner kitchens (particulate matter reduced by over 60%)
- » Cooler for the cook and kitchen.

Complete the chores of cooking at
lightning speed

Save fuel expenses, time & money

MANGALA
New generation stove for the intelligent

Reduces the ill-effects of smoke

During the product development and testing phase, not much marketing was done. Since the Shell Foundation was funding the product, they required that the product was kept at a low key level at the initial product development stage and until the pilot project was completed. There was some publicity done by Shell in terms of its road shows held in Bangalore and Chennai to inform potential stakeholders (non governmental organizations (NGOs), private sector, suppliers) about the program and to seek potential partners from the process. Most of the marketing took place once the product was tested and ready for distribution.

The product was named MANGALA, which means auspicious in Sanskrit and in most Indian languages. It's a name that could be understood both in South and North India. The marketing, advertising, and creative contract was given to a rural marketing agency called Anugrah Madison. They first came up with an in-house list of potential brand names. A short list of these—about eight (8)—were sent to the Trademarks authority of India to determine if they were available to be branded in the stoves category. The few names that were available were then tested using brand name research techniques - village focus groups and discussions and Mangala was the final name selected.

Market research was conducted to inform project sponsors about cooking habits, fuel usage and practices and women's needs and aspirations related to a stove. The information gained from this research provided critical information for design of an appropriate stove. The stove design and testing was conducted by a group of experienced stove designers.

To ensure a high quality product, EWV Brought together a partnership of stove designers, private sector manufacturers committed to quality, commercial minded NGOs for stove production and marketing. Prototype stoves were developed and field tested in selected households/villages. During field tests, stove user committees and focus groups were used to get information about usage, benefits, problems.

Developing the market for stoves was accomplished through branding, developing user manual, sales promotion through demonstrations and advertising, sales through local rural governments and commercial/retail channels, and training at various levels.

A variety of posters were developed and tested with focus groups by the research consultants. From this research the final posters, messages, and product image were presented.

From the audience research into the brand, current cooking behaviors and the potential messages, several key benefits were promoted as part of the messaging strategy. They include speed of completed cooking chores, combined with savings in fuel expenses, time and money: Complete the chores of cooking at lightning speed. Reduce fuel expenses, save time and money. The saving of money was related to fuel expenses as well as the savings resulted from reduced illnesses and better health.

The communication plan for the Mangala stove was as follows:

- » ATL (Above the line) – Local press ads, cable TV 1 minute ad
- » Below the Line (BTL) – Posters, video, packaging material, brochures/leaflets, fan – giveaways.



- » There was a product launch (influencers and NGO partners) and Consumer Education Programs which were held in targeted villages through a van campaign.

The Marketing strategy chosen for the campaign included a mix of events, a video script, and collaterals based on research above and Anugrah Madison's experience in rural and urban marketing in India.



The Consumer Education Program plan included Mobile Promotional Activities using a branded van, in association with the local retailer and pre-identified stove promoters.

Based on pre-determined journey cycle plan, Villages within 15 km. radius of target towns and Myrada Community Managed Resource Centers (CMRC) were covered. Each van covered a minimum of one village per day. Vans could cover two villages a day, depending on the size of the village. A journey cycle of 25 days could cover 25 to 40 villages per district, adding up to 50 to 80 villages for up to two van cycles.

Typically, the van would arrive in a village and the promoters would start handing out invitation cards women and men throughout the town. The card would invite people to a presentation about the stoves later in the day and offer an incentive to attend presentation. Often times the van would drive through the streets broadcasting from loud speaker, inviting people to attend. The program would usually be held at a school. The product would be on display, though a live demonstration of the stove was not offered. There would be a short a presentation about the stove, followed by a video that was produced as part of the marketing materials. Following the live and video presentations, promoters would have a question and answer period. To keep people's interest and make the event seem special, there would also be games and entertainment. The whole event would take an hour or so.

During the development, production and marketing phases of the project, audience feedback resulted in refinements that increased sales and the overall success of the project. One of the critical issues with the product was the PRICE – the cost of production was higher than the price the market would accept, so at the pilot stage the product had to be subsidized. To ensure sustainability of the project, product materials costs were reduced, using alternative materials and increasing efficiency of production at the production/assembly plant. At the marketing level, for the pilot stage, refinements were required with the van campaign. In some areas the van promotion team was excellent and handled the client group questions and follow up effectively. In a couple of instances, when the campaign first started, this was not done well and it affected the sales at that village. However, discussions with the van crew and management yielded positive results as the campaign continued.

Another key lesson was learned regarding project length. The project attempted to do in six months what would have normally taken 18 months to accomplish. This was due to funding restrictions. Because of the short turn around for the project, there was pressure to meet deadlines that affected the development and pricing issues. Human resources were also a challenge,



with team members trying to work on production and marketing aspects of the project at the same time.

While the EWW involvement in the project was fairly short-lived, 1,500 stoves were produced and 1,000 sold during the initial phase of the effort.

GHANA

In Ghana the concept was the same as in India: promote affordable, clean-burning stoves which cook faster, while teaching about the dangers of inhaling smoke and fumes.

The original aim was to reduce IAP levels in 40,000 urban and 5,000 rural households, but more than 120,000 Gyapa stoves have been sold since late 2002, far exceeding those targets.



Marketing and Raising Awareness

Charcoal is the fuel of choice for 65% of urban households in Ghana, but used in a traditional coal pot, it burns inefficiently, causing air pollution and quicker deforestation.

Enterprise Works/VITA is promoting a Kenyan sourced alternative stove called the Gyapa (meaning 'good fire') which is produced in three sizes. A ceramic liner improves fuel-efficiency by up to 50% and the stoves are marketed with the slogan 'it's already cooked'.

Both social and conventional marketing methods were used to promote Gyapa stoves in Ghana.



These included TV and radio advertisements, newspaper promotions, cooking demonstrations on market days and quizzes.

The message to the public centered on economic and health benefits, as well as emphasizing the affordable price.

Enterprise Works/VITA ran educational campaigns in seven locations, mainly for women, on the dangers of inhaling smoke from cooking stoves. Cooking outdoors or by an open window or door, keeping children away from smoking fires and extinguishing a fire immediately after use were all recommended, along with design changes to homes, such as higher ceilings and bigger windows. These campaigns included a 10-minute documentary film and advice on the need for good ventilation and to avoid inhaling smoke wherever possible, regardless of stove choice.

III. WHAT'S THE PROBLEM?

A marketing or social marketing campaign is like a challenge, a puzzle waiting to be solved. In order to conquer the challenge and solve the puzzle, you must first identify the social marketing problem you face. Then, in a traditional social marketing campaign, you would use your knowledge of the local area and its people (or conduct a local assessment) to determine the most appropriate behaviors to promote to solve the problem. Depending on the project, local assessment may have already been done and the technology or product already chosen when you join the effort. Even if that is the case, you will still need to conduct audience research to determine barriers to change and benefits you can promote to overcome the barriers.

In a project using the hybrid marketing-social marketing model, the product you are promoting and its use by your audience will solve or greatly reduce the social problem. For example, manually drilled wells and pumps may provide more access to cleaner water. The lack of enough clean water to drink or to grow food may be contributing to health problems among villagers.

Once you know what you are going to market and why it is a good fit, you can create a strategy to overcome the barriers your audiences may have. The end users may have barriers to purchasing the new product or technology and changing their behaviors for the better. However, donors and government officials may also resist the technology and program you are promoting, as was the case in the Niger example from Chapter 1.

DEFINE THE PROBLEM

The first step is to identify the problem. This is where baseline data comes into play. Baseline data is information gathered before the case is developed. This data is later used to compare or assess the program. Whatever your topic of concern, your concern is warranted because somebody has researched the topic and has shown it to be a concern. Consider the cases mentioned in each of the first two chapters, in each case the problem is readily apparent. In Niger, there was a need for an inexpensive and efficient way for individual farmers to pump water out of the ground for their crops. In rural areas within India and Ghana, indoor air pollution from cook stoves was a health concern.

- » Use health statistics, environmental data, other social data, and observation to determine the problem.
- » Use the information about the problem to set yourself up for success in the rest of your project.

Baseline data about your audience and their local community is essential to understanding the needs in the market. Sometimes local coordinators will understand the needs because of their regular observations. Other times the knowledge can come from government statistics, data from universities, or other research sources. General hospital and clinic data may be collected by the local or national government. In the projects where you are promoting a project to overcome a health issue, these kinds of statistics may be very helpful in determining if you are on the right track. If the issue is crop yields, local farm agency statistics or the words of the gardeners or farmers themselves may help supply your baseline data.

Much of the time, determining the problem or marketing issue is the easiest and shortest part of the project. Yet, correctly determining the problem or the need is vital to ensuring success. Don't

overlook this step on your way to understanding your audience and creating messages. As you define the issue or problem you want to address, you may encounter barriers that appear because of the solutions you offer to the original problem. For example, in Niger, not enough water for crops. The solutions identified were manually drilled tube wells and hand or foot pumps. The project leaders know they were offering technologies that would solve the problem. But in offering the solution, they exposed a barrier on the part of some of their audience. Many government representatives and donors considered the manual technology to be backward. While the issue or problem remained the same—lack of water for gardens and small farms—and the solution offered was still considered the best possible solution, project coordinators had to address the attitudinal barriers among parts of the community before they could find local manufacturers and promote the product to the end users. In other words, the original solution created a problem among a segment of the audience that had to be addressed in order to continue solving the original problem.

While we will discuss barriers in more depth in later chapters, it is important to note that attitudinal or emotional barriers that arise or surface as you move forward with your project, become a problem in their own right and are as real and as important as the original need.

STRUCTURAL ACTIONS

Sometimes defining the issue, or problem, and the action or product that will address the problem is only part of the marketing challenge. As a project sponsor or leader, it is critical that you make the product or action you are marketing accessible to your audience. It also must be feasible for them to purchase the product or take on the action you are promoting. This is where structural actions come into play.

Structural actions are those things that the marketers do to make the thing you are marketing more accessible and feasible for the audience.

If, for example, a community had a problem with litter/trash in parks and other public places, project leaders might choose to promote the positive reasons for properly disposing of the litter. There are a number of reasons—public health, aesthetics, personal responsibility—that public might choose to be better at properly disposing of their trash. Research is conducted to test the possible approaches with the audience, the messages are developed and tested, the media mix is chosen and the campaign implemented. Yet, the rate at which people are littering is not declining significantly. In this hypothetical example, the project leaders conduct additional research to determine why the campaign failed. What they realize is that there needed to be significantly more trash receptacles located in strategic locations within the public places in question. In this case, there structural barrier was the lack of waste cans in prime locations. The structural action would be for the project sponsors and leaders to supply the cans and the means for them to be periodically emptied.

Addressing structural barriers usually does come at a price—financial or in terms of time and effort. The Proctor & Gamble Company learned this lesson when they developed water purification powder sachets they marketed under the brand of Pur. The company test marketed the product with very limited success in Guatemala, Morocco and Pakistan from 2000 through 2003. The Sachets were sold for \$.08 - \$.10 each, and marketed toward low income families. However, repeat purchase rates were very low. Following one more test in Pakistan in 2004, with the same result. During the commercial venture the company tried many marketing techniques to increase sales. They ran TV and radio ads, sponsored rock concerts and tinkered with its pricing.

Finally P&G scrapped the project as a commercial venture and turned it over to its non-profit division. The company worked with local, national and international non-profit organizations, including Population Services International (PSI). Working through PSI and other groups, P&G now uses social marketing techniques — similar to those used to promote condom use — that combine education and subsidized product pricing to encourage behavior change and product use. The sachets are sold to these groups at cost (\$.04 each), and large quantities were donated. These cost savings were passed along to the consumers, who received sachets for free or at cost. Along with the reduced cost, the target audience shifted somewhat as well. “We’ve learned to target our approach to people that need it the most — people with really dirty water, people with HIV/AIDS, moms with newborns at health clinics, and malnourished children,” said Dr. Greg Allgood, a toxicologist who directs P.&G.’s nonprofit Children’s Safe Drinking Water program.

Marketing the product through non-profit health and social marketing agencies, who have strong local and regional networks of service providers has been an important element in the success of the program. In the Democratic Republic of Congo, for example, P.S.I. and a local aid agency, Association de Santé Familiale, currently distribute PUR through 5,000 health centers, pharmacies, retailers and wholesalers.

By 2006, 54 million PUR sachets had been distributed in 10 different markets worldwide.*

Chapter Summary

Any successful marketing venture starts with clearly defining the marketing challenge or problem. A viable solution needs to be developed and effectively marketed. Viable solutions may include a product or a behavioral change that audience members can incorporate into their lives.

Sometimes marketing the product of the change is not enough to get the audience to use it. Structural changes taken on by project sponsors or leaders may be required in order to achieve success in the marketing effort. These structural changes can include making the price more feasible, providing better access to the product or action, or changing rules and regulations, etc.

* Ferguson, Kevin, online article. <http://greeninc.blogs.nytimes.com/2009/05/08/the-art-of-marketing-a-water-purifier/>

IV. ASSESSING YOUR MARKETING CAPACITY

Conducting a successful marketing campaign takes more than knowledge of basic marketing strategies, or the ability to hire qualified consultants to conduct marketing research, produce advertising and marketing materials, etc. It requires strategic partnerships to be successful. In social marketing efforts, there is never enough money to hire all the consultants you want and all the staff you need. But you can leverage the talent and effort it takes to some degree by surrounding yourself with the right partners.

A great way to determine the resources you need is to make a list or a matrix. Another way used for years by corporations, larger non-governmental organizations and government agencies is called a Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis. Conducting a SWOT Analysis is a way to analyze and evaluate your current situation and the environment in which you will be working. While it's typically used for strategic planning in business and social service settings, it can also be used in goal setting to identify goals that will give you the most benefit in specific projects or programs. It is a way of matching your internal capabilities, resources and liabilities with the external factors you are facing.

SWOT Analysis

- » SWOT stands for Strengths, Weaknesses, Opportunities and Threats
- » Strengths and weaknesses examine your internal abilities and limitations
- » Opportunities and threats are external factors that may impact your success

PERFORMING A SWOT ANALYSIS

Start by identifying your **strengths**, which represent your internal capabilities and resources in this result area. Here are some questions you can use to get started:

- » What are your core competencies in this area?
- » What relevant skills, talents or abilities do you possess?
- » What resources both financial and human do you have at your disposal?
- » What specialized knowledge or expertise do you have access to?
- » Whom can you ask for advice, support or help?
- » What special/proprietary tools can you use or develop?
- » What is already working well in this area? What related strengths does that reveal?

Keep in mind that not all of these questions will apply to every result area. Just use the ones that make sense to help you identify your strengths.

The next step is to identify your **weaknesses**, which represent your internal liabilities. In many cases, the lack of a strength or resource can be considered a weakness. Here are some ideas to help you identify your weaknesses:

- » What are your main liabilities in this area?

- » List all the relevant skills, abilities and talents that you would find helpful in this result area. For which of these are you skilled or proficient?
- » List the specialized knowledge or expertise that you would find helpful in this result area. Any knowledge or expertise that you lack could be considered a weakness.
- » Are there any resources (money, time, help) that you currently don't have access to?
- » What is not working in this area right now? What related weaknesses does that reveal?

Your **strengths** and **weaknesses** give you an idea of your internal capabilities, resources and liabilities. The next step in SWOT analysis is to identify your external **opportunities** for profit, growth and improvement. Here are some ideas to help you identify them:

- » List the opportunities that you have been considering.
- » What things could you improve on in this result area?
- » Think of one thing you could do that would significantly improve your situation in this area.
- » What important goals could you pursue?
- » How can you take advantage of your strengths?
- » Can you take advantage of any changes in your environment or circumstances?
- » What opportunities would become available if you eliminate some of your weaknesses?
- » What is the competition / cultural issues

Now identify your **threats**, which represent external events, environmental factors, or changes that could affect you negatively. Here are some ideas to help you identify threats:

- » Make a list of serious risks you are facing in this area if you continue along your current path.
- » What obstacles or roadblocks are impeding your progress?
- » What environmental factors are affecting you negatively?

Community Culture and the Environment

Action Steps

- » Step 1: Conduct Pre-project Planning
- » Step 2: Define Goals and Community
- » Step 3: Identify Community Characteristics
- » Step 4: Identify Assessment Methods
- » Step 5: Analyze Results
- » Step 6: Select and Implement Best Strategies

CCE Community Characteristics

- » Community Boundaries
- » Community Capacity and Activism
- » Community Interaction and Information Flow
- » Demographic Information
- » Economic Conditions and Employment
- » Education
- » Environmental Awareness and Values
- » Governance
- » Infrastructure and Public Services
- » Local Identity
- » Local Leisure and Recreation
- » Natural Resources and Landscapes
- » Property Ownership, Management, and Planning
- » Public Safety and Health
- » Religious and Spiritual Practices

- » Think about how current changes to your environment or circumstances could affect your campaign negatively.

While you may not need to conduct a full SWOT Analysis to understand the resources and people you have versus what you need, it is an effective way of getting it down on paper. At this point you can determine if you have the right people and resources in place, and look to forge partnerships to fill the void.

ASSEMBLE YOUR TEAM AND LEARN ABOUT YOUR COMMUNITY

One thing that separates social marketing from commercial marketing is that social marketing can and should be a team effort. Regardless of your subject matter and whether your project is local or national in scope, there are sure to be many agencies and organizations who at least partly share your vision and goal. Because of limited financial and staff resources within any one entity, your social marketing effort may only be as effective as the interagency team you assemble. Even if other organizations only offer advice or staff time, you are still ahead of trying to do it alone.

There are many great social science tools available to help organizations “map” the people, places, issues and assets within a community. Mapping shows where information is held by the organization to carry out the activity. Understanding these aspects of the planning process may help in planning and implementing a social marketing campaign. The U.S. Environmental Protection Agency has developed a guide, *Community Culture and the Environment: A Guide to Understanding a Sense of Place*, which describes many of these processes.*

The document outlines six steps to assessing your community and its resources that can be useful in your outreach and social marketing efforts. The six steps are listed in the shaded box above, along with a list of community characteristics.

The guiding principle behind social science tools like those found in the *Community Culture and the Environment* guide is that the more you know and understand about your community the better your chances of successfully implementing behavior change campaigns.

Chapter Summary

Assessing your marketing capacity includes understanding your strengths and weaknesses, as well as knowing the opportunities and threats that exist within the community in which you plan to implement your campaign. Partnerships can be a great way to increase your marketing capacity without the financial expense of hiring as many consultants. Finally, there are social science tools that can help you map out and understand the community in which you plan to work. These tools can help you identify community characteristics to help you better target your marketing efforts.

* For a summary of the document: <http://www.epa.gov/ecocommunity/tools/community.pdf>; To download a copy: <http://www.epa.gov/ecocommunity/pdf/ccecomplete.pdf>.

V. UNDERSTANDING BARRIERS TO CHANGE

Taking on a local social marketing or marketing campaign is similar to moving to a city, town or village. When you first arrive, there are a lot of things you need to learn about the area. The things you will learn as you assimilate into a new area range from understanding the politics and religions of the area, to learning about the cultures of the people, to understanding the best fitting neighborhood for you and your family, and the best schools for your children.

While every person is an individual and no two people are completely alike, there are things people have in common that make them part of a particular audience group, or segment. Audience segmentation is important because there are always multiple audiences in marketing campaigns. In Niger, for example, working with the sponsors and the government to convince them that the manual water pumps were a good fit for the local rural farmers was almost a separate campaign. It had to be done in order to get to the local level audience of gardeners and farmers.

Employees in government agencies, as in the Niger example, may have a different perspective regarding manual pump technologies for farmers than the farmers themselves. The one government official quoted in the example said “first the foreigners bring ox carts and make our animals work, now they bring treadle pumps and make our farmers work.” On the other hand, the farmers welcomed the manual pumps as a cost-effective and efficient way to get more water. Sometimes leaders of an agency will have different perspectives than field staff from the same agency. There are a lot of things that can make us similar to others in our community, that put us in a segment together. They can include:

- » Gender
- » Ethnicity
- » Religion
- » Job/occupation
- » Age
- » Education
- » Interests/hobbies
- » Political affiliation, and many others

Again in this step, much of the data you will use already exist and some will be collected new.

There are many ways to find out about your community. Government population data and statistics compiled by local agencies and organizations can help you to understand the cultural, age, and gender makeup of your community as well as other demographic measures such as income, average family size, percentage of single people, percentage of home ownership, etc.

Identify / Segment Audiences

- » Use community statistics to determine demographic and other characteristics of your audiences.
- » Group individuals in ways that make sense to your project.

Other things you may learn from observation, surveys, focus groups or other newly collected data may include family and social structure. Who within a family would make the buying decision

about the cook stove? Who would make the decision about the water pump for irrigating crops and gardens? Who decides to invest in a manually drilled well?

Much of the information listed above may already exist and is accessible. You should always try to gather as much existing background data as possible before paying for new research. Finding and using as much previously collected information about your community as possible will reduce the amount of more expensive new data you will have to generate in order to implement your campaign.

UNDERSTANDING BARRIERS

When looking at barriers to changing behavior it might be worthwhile to ask why you want your audience to change a certain behavior. "It's better for their health. It's better for the environment. It's better for the community." Those are typical reasons to engage in a behavior change program. Now ask yourself another question, "If it's better for them and the 'right' thing to do, why aren't they already doing it?" There are many reasons why people don't change for the better. These reasons are some of the barriers to change. In your case, the product or technology you are marketing may never have been available to your audience. Accessibility is definitely a barrier. But making something accessible doesn't necessarily eliminate the other barriers to change.

Barriers to change can come in all sizes, shapes and colors. "This is the way I've always done it. This way was good enough for my father and his father, so it's good enough for me. It's cheaper. It's easier, it takes less time to do it this way." There can be many variations on these themes, but the belief on the part of the consumer is, 'it is easier or somehow safer to stay with something with which you are familiar, rather than to try something new'. Further evidence of this point comes in the form of the excuses people often give for not trying a new behavior. Have you ever heard any of the following phrases: "It's too hard to do, it's not convenient, it's too far to drive, it takes too long, it costs too much, I don't know how to do it, nobody else does it this way, I tried it once and it didn't work, or none of my neighbors or peers do it this way."

Barriers in Niger

The government and donors were reluctant to accept manual technologies because they viewed them as backward, preferring motorized pumps. Farmers however were quick to see the benefits for them.

WHY WE DO WHAT WE DO

Above are a few of the reasons or excuses people give for maintaining their current behaviors. Social scientists indicate that there are deep seated reasons beneath the excuses for people's actions. All of these categories have an element of emotion. Some are very emotional in nature. It is difficult to change someone's mind when they have a deep-rooted reason for what they think, believe or do.

Reasons for our actions can include:

- » Survival – food, drink, shelter, sex.
- » Safety – need for security, protection.
- » Self-control – need to control one's own behavior, make choices, etc.

- » Self-esteem – need for a positive view or image of ourselves.
- » Social relationships – need for acceptance, love, belonging to a group.
- » Social recognition – need for respect, prestige, approval.

“Change your thoughts and you change your world.”

Norman Vincent Peale (1898 - 1993)

So what do those categories really mean when it comes to behavior? The following is a breakdown of the reasons we do the things we do.

Self-Efficacy	“It’s easier.” “I know how to do it.”
Actual Skills	“I’ve been trained in this.”
Social Norms	“It’s what I’m expected to do.”
Perceived Consequences	“I get rewarded.” “I’ll get punished.”
Self-Standards	“People like me do this.”
Emotions	“I always pick the blue one.”
Environmental Constraints	“I’ll be in compliance.”
Intention	“This is what I have decided to do.”

It is important as a social marketer that you try to keep in mind the psychology behind the things we do and say. Emotion is a big part of the decisions most people make.

Whether a decision is based in emotion, fact or a bit of both, individual behaviors are often the choice of individuals. In order to get people to change behaviors they have to choose to change. What will get people to change?

Chapter Summary

Background data can provide a lot of information about your audience and help you segment your audience into groups with common beliefs, actions, or other traits. Sometimes the important thing an audience segment has in common are the barriers that keep them from buying a new technology or taking on a new action. Barriers can be emotional, physical, financial, or educational.

There are many reasons people do what they do, that include survival, safety, self control, self esteem, social relationships, social recognition, etc. Emotion can play a role in every decision people make. Forced or coerced change is usually not sustainable. Usually, people need to choose to change in order to sustain the change.

VI. AUDIENCE RESEARCH TYPES & METHODS

At the end of the previous chapter the question was asked: what will get people to change? There may be as many answers as there are people, but the best way to find out is to ask them. Commercial marketers and advertising professionals have known for decades that when it comes to determining the best approach to selling a product to a particular audience, the audience knows best. Representative members of any given audience are the “experts” in determining the approach, channels and message to use to get them to buy.

“When people talk, listen.
Most people never listen.”

~Ernest Hemingway
(1899–1961)

In social marketing the concept is similar, but the “product” you are promoting is a behavior. The partnership model using the hybrid marketing approach requires that you pay attention to the product aspects of audience research as well as the behavior and social dimensions that are involved. In both commercial and social marketing the ultimate goal is to determine the barriers to behavior change and identify the hook or trigger that will prompt change. The hook is something that grabs the attention and sparks or triggers the interest of the audience.

WHAT IS AUDIENCE RESEARCH?

Audience research, also known as marketing research, consists of several methods designed to determine the interests, habits, beliefs, etc. of a representative sample of a larger group of people.

As mentioned earlier, marketing research is divided into background and primary research. We have previously talked about the importance of collecting and using background data. In this chapter we will focus on primary research. Primary marketing research can be quantitative or qualitative in nature. There are several methods of conducting qualitative and quantitative research.

We will briefly look at a few methods of collecting background and primary marketing research in this publication. There are dozens of good books, articles and the like that go much deeper into the theory and practice of various audience research methodologies. Here, we will examine what parts of the process are easily taken on by project sponsors and their partners, and which aspects should be contracted with professionals. The goal of this chapter is not to turn every country director and local project into professional marketing. Instead, the goal of this chapter is to provide project leaders with the tools and desire to be quality consumers of social research products. There may be some things you can and are willing to do yourself or within your group in order to save money. Regardless of how much you do and how much you contract, remember that quality marketing and social marketing efforts are built on a foundation of solid target audience research.

Primary audience research types

- » Quantitative
 - > Surveys
 - > Intercept interviews
- » Qualitative
 - > Focus groups
 - > Interviews
 - > Observation

PRIMARY RESEARCH

Primary audience research is the process for collecting new data about your target audience(s). Some of the things you are trying to determine with primary research at the beginning of a project include:

- » Your audiences' general knowledge of the subject matter.
- » Are they aware of alternative behaviors that may be healthier, more environmentally friendly, etc?
- » Their specific understanding of the consequences of their current actions.
- » What are the barriers preventing your audience from adopting healthier practices?
- » Where your audience members get their news and information about the subject matter you are promoting.
- » Who makes the decisions for the target audience / household, government?

SURVEYS

A survey can be a powerful tool to figure out what your audience knows, wants and needs related to your organization and the services you provide. Surveys can help you understand what people know, what they believe, and what they do. You may also be able to determine from a survey how people do things and where they do them. Administered correctly, a survey can provide statistically significant data from a representative sampling of a larger audience. However, this type of quantitative research does not get to the heart of the matter. A survey probably won't tell you why a person does a certain behavior or believes a certain way. It may not help you understand the underlying barriers that may stand in the way of your audience adopting a new behavior. Those types of data are better suited for qualitative research such as focus groups and in-depth personal interviews.

Just the process of developing a survey will help you learn more about your target audience. While designing, conducting and analyzing surveys are skills that can be taught and replicated by you and your partner organizations, these can be very technical skills that require a good deal of experience and study to be performed correctly. It may be worth it for your organization to contract much or all of the survey design, implementation and analysis process. On the other

Survey pros and cons

» Pros

- › They are statistically significant.
- › They indicate what people believe.
- › Indicate what they do.
- › Indicate where they shop/get media information.

» Cons

- › They do not explain why.
- › The data are only as good as the people who create, implement and analyze them.
- › Self-reported behaviors and beliefs may not be completely accurate.

hand, there may be aspects of this process that you or one of your partners are qualified to perform. There are books and online courses available that will help you understand all aspects of the survey process.

“USA Today has come out with a new survey—apparently, three out of every four people make up 75% of the population.”

~David Letterman (1947 -)

The Survey Process

What follows is a list of the typical steps involved in designing, executing and analyzing a survey. If you do choose to do part or all of a survey on your own, following these general steps will help along the way.

1. Establish the goals of your survey—what are you trying to find out? As you think this through, be very specific and write down your goals. Consider what you will do with the results before you start the survey.
2. Whom will you ask?—the demographic information you collected by conducting secondary research, combined with your knowledge of the topic and audience should help you determine your initial audience. The respondents for an initial survey will most likely be drawn from a larger target audience than will respondents in later surveys and qualitative research you complete.
3. What method of surveying will you use?
 - a. Personal interviews—face-to-face interviews which are often conducted door to door or in a public gathering place such as a shopping area.
 - b. Telephone surveys—one of the more popular methods in the U.S. Telephone surveys can be less expensive than personal interviews, but the sample may not be very representative in an area where not many people have phone service.
 - c. Postal surveys—inexpensive and less biased, because there is no interference from the interviewer. However, it can be difficult to get an adequate response due to inherently low response rates to mailed surveys. It also largely depends on the quality of the post in the area in which your project is focused.
 - d. Web based—Best used if your target audience is online and uses your site. This can be a very cost-effective method of soliciting responses. Once again, it is easy to get skewed results unless a representative portion of your audience has web access and knowledge of the host site for the survey.
4. Plan your research carefully—once you know whom you are surveying and what method you will use:
 - a. Develop a timeline—determine how long it will take from the time you start developing the survey to the time the data are analyzed and ready to release. You may need to make minor adjustments.
 - b. Do a cost estimate—you may want to break down the cost by each step, especially if you contract some steps and do some yourself.
5. Design the survey—write the survey based on the method you chose in Step 3. Sometimes you can borrow a survey design or specific questions from other groups.
6. Pre-test the survey—pre-testing will help you determine if the survey is easy to understand, if people are able to fill it out, and other problems that may occur. Test it on people you

believe have a similar knowledge level about your topic as the survey audience. Rewrite the survey if needed.

7. Test, conduct the survey—depending on the chosen method, the amount of effort that goes into collecting data will vary greatly. Intercept surveys (in-person) and telephone surveys are the most labor intensive. The interviewers will need to be trained to properly collect the data. Mail surveys and web-based surveys require less effort once the survey is designed.
8. Analyze the data—this part is the most technical and skilled part of the process. Statistical analysis can be tricky. Because your survey is only as accurate and useful as the data it generates, make certain this portion of the process is done very well. Unless a skilled and experienced person in analyzing survey data works for your organization or for one of your partner organizations, this would be a good task to contract out to a professional market research firm.

Final Thoughts about Surveys

Surveys are a key to identifying and understanding audience behaviors, beliefs and habits. However, they can also establish a baseline for project evaluation. A pre-project and post project set of surveys is one of the best methods for documenting success in behavior change programs.

On the down side, keep in mind that surveys—whether they be self-administered or administered by a staff member or professional contractor—are a form of self-reporting. The hope is that 100 percent of the respondents answer completely honestly 100 percent of the time. In reality, there is no way to verify if a respondent is really composting, recycling, picking up after his pet, etc. without actually observing the behavior.

Survey Process

1. Establish survey goals.
2. Determine survey audience.
3. Determine survey method.
4. Plan research—timeline.
5. Design the survey.
6. Pretest the survey.
7. Test and deliver the survey.
8. Analyze the data.

FOCUS ON FOCUS GROUPS

Focus groups are group interviews. A moderator guides the interview while a small group discusses the topics that the interviewer raises. What the participants in the group say during their discussions are the essential data in focus groups.* Focus groups are a popular and effective way to conduct qualitative audience research. While they do not provide statistically significant data like surveys provide, focus groups do provide important insights into your audience. Focus group discussions can reveal why people do certain things in certain ways. In social marketing projects they shine a light on the barriers to behavior change. Many times these barriers are not physical or tangible in any way. It may be a sense of tradition: “It was good enough for my father and grandfather, it’s good enough for me,” or fear of the unknown. Sometimes the barrier is a misconception or lack of knowledge, while other times it is a lack of money or other tangible resources. Whatever the barrier(s), a well-designed and administered series of focus groups can bring the issues and obstacles into focus. They may also provide insight into overcoming the barriers identified.

Focus groups can also bring the issues into better focus for the project sponsors and researchers.

* The Focus Group Guidebook, by David L. Morgan, Portland State University. Focus Group Kit Volume 1. ISBN 0-7619-0818-8. 1998.

According to David L. Morgan, University of Portland, people who are new to focus groups often limit their attention solely to the communication that goes on within the groups. Instead, it is important to understand that the actual groups are at the mid-point of a larger, three-part process of communication: (1) The research team members decide what they need to hear from the participants; (2) the focus groups create a conversation among the participants around these chosen topics; and (3) members of the research team summarize what they have learned from the participants.*

By really listening to what is being said in the sessions, the research team can learn some valuable information about each group dynamic as well as how the target audiences relate to your topic. If you listen well enough, the group participants will “tell you” how to approach them with your message and how to help them overcome the barriers to adopting new behaviors. Your target audiences have all the answers. It is up to you to sort through the information and pull out the nuggets of wisdom that will be your keys to success.

Who should do the work?

Is it better to try to do most or all of the work of planning, implementing and analyzing focus groups in house or is it better to contract most or all of the process with professionals? It depends on many factors including the size and scope of the project, the in-house resources that can be dedicated to the work and the abilities of the staff and partners.

The focus group process

As mentioned above, a focus group is a discussion group led by a moderator. A typical smaller project will use 2-4 groups. Each group session usually lasts 1-2 hours. The small group of participants—usually 8-12 per session—are selected using a purposive sampling method. In other words, the makeup of the group will relate back to the goal or purpose of the project. Focus groups designed to test messages and the approach of a behavior change campaign aimed at dog owners should have dog owners in the groups. Therefore, targeted recruiting among dog owners is required for this particular series of groups.

Recruitment

There are two popular ways to conduct focus group participant screening. One way is to use a random digital dial telephone screening process. In this method, the caller wouldn't know at the beginning of the call whether the potential respondent fit all the requirements of the specialized group. Special screening questions would be asked to include and exclude certain people. Screening questions

* Planning Focus Groups, by David L. Morgan, Portland : 0819-x. 1998.

Focus Group Details

- » Group discussion format.
- » Moderator led.
- » 8-12 participants per group.
- » 2-3 groups average per project.
- » 1-2 hour session per group.
- » Discussion points go from general to specific.
- » Moderator uses discussion guide to keep the discussion on task.
- » Good forum to test messages.
- » Video and audio recording recommended.
- » Compensation to participants (cash or in-kind) usually needed.
- » Provide a comfortable setting and food for participants.

might include: age, gender, geographic location, and whether they already engage in the positive behavior or action you are promoting.

Another popular way to recruit for specialized focus groups is to target people you already believe may meet most or all of the screening requirements. You might include a tribal elder or a person you know that raises food if you are trying to determine knowledge and attitudes related to manual pumps. In the case of the stoves, you might target women who use the older, less efficient stoves. In the case of new water sources you would probably target women who are generally responsible for obtaining water for the household.

Sometimes the recruitment is not quite so narrowly focused as in the examples above. You might be interested in the opinions of area residents from the ages of 18-35, men and women, married and unmarried.

Regardless of how narrow the focus of the topic and which recruiting method is used, a recruiting screener tool is prepared before potential participants are contacted. Even if you hire a professional research company to handle this part of the process, you and your partners will be working closely with the researchers during this part of the process.

A telephone screening call is like a mini telephone survey. The recruiter will announce his or her purpose for the call and ask a few questions to determine the best possible mix of participants. If the potential participant qualifies and is interested and available to participate in the group, the recruiter will get the rest of the person's contact information. A confirmation letter will be sent to the participant a few days prior to the session.

Recruiters usually over-recruit by a couple of people to account for the possibility that a couple of people will not show up. The incentive you offer is meant to reduce the chance of a no-show. However, sometimes in this busy world something else comes up. If you ideally want 8-10 participants, a good rule of thumb is to recruit 12 people. If all 12 show up you can have a plan in place for what to do with the extra people. You could either hold your group with 12 people or send a few home. In that case, the professional approach is to offer those extras the same compensation and food you offer participants.

OBSERVATION

Observation can be an important research tool in a behavior change program because the answers given in surveys, person-to-person interviews and focus groups are self-reported. If people tell you they are sweeping their grass clippings and fertilizer off the sidewalk and driveway, you can either choose to believe them or not, but you have no way of independently verifying their claims. With observation, you can verify that people are doing what they say they are doing.

Social scientists like observation because it can show:

- » Social relationships between people/groups
- » Individual/group behavior in different social settings
- » Communication modes between people.*

* Involving Community Members in Focus Groups, by Richard A. Krueger, University of Minnesota & Jean A. King, University of Minnesota. Focus Group Kit Volume 5. ISBN 0-7619-0820-x. 1998.

Observation does have shortcomings. Chief among those is the time, effort and cost associated with this technique. Even if money were no object, how would you monitor a neighborhood's lawn care, pet care and automotive care completely or accurately? You couldn't. Now imagine that at a city scale.

Observation can provide some anecdotal backup to what has been self-reported. If you can focus observation on areas where a large number of people are engaged in the same or similar activities, your observation efforts can be most cost-effective.

ONE-ON-ONE INTERVIEWS



Individual interviews are qualitative and can really get below the surface like focus groups, sometimes even more so.

The biggest drawback to individual interviews is how time-consuming they can be. This can be lessened if the interviews can somehow be concentrated geographically or if you only need to conduct a few interviews to get an understanding of the 'why' part of the issue.

CHAPTER REVIEW

Quality audience research is the foundation of a good social marketing effort. Some audience data can be acquired from existing sources such as census reports, other government reports, and surveys already conducted by other groups. This is called secondary, or background research. Newly collected data to be used specifically for your project is referred to as primary research. Primary market or audience research is either quantitative or qualitative. Quantitative research can be statistically significant measures of your audience's actions and beliefs. Quantitative research tells you what people do, when they do it, and it can even tell you how they do something. Qualitative research is needed to understand the 'why' behind a person's actions or beliefs. Qualitative research is not statistically significant, but it can still give insights into a larger audience using a smaller sample of the population.

Surveys are the most popular form of quantitative audience research. Surveys can be conducted face-to-face (intercept interviews outside voting locations and other public places), over the telephone, in the mail or online.

Surveys use a combination of open-ended and closed-ended questions. Open-ended questions provide more insight into the minds of the audience but they are harder to quantify statistically. Closed ended questions include "yes/no" questions, multiple choice questions and scalable answer questions.

Surveys are good at telling researchers what people do and believe. Surveys can determine a lot of demographic characteristics of the audience including age, income, location and education level. Surveys can also indicate when, where and how people do certain actions.

Surveys require specific skills to prepare, execute and analyze. While these skills are all obtainable by project sponsors, many project sponsors do not have the time and inclination to acquire the

necessary skills to conduct surveys. Most surveys, therefore, are contracted to /professional research firms.

Focus groups are the most popular form of qualitative research. Focus groups are led by a skilled moderator. They are essentially group discussions among 8-12 members of a target audience. The moderator asks a series of questions during each 1-2 hour session. The questions usually go from general to specific. Focus groups are also often used to test messages, concepts and products. This usually happens toward the end of the session after the topic has been established.

Audio and video taping of sessions is encouraged for several reasons. Moderators can use the tape to help them prepare their short report and analysis of each session.

A typical local watershed project will use two to four focus groups. Often focus groups are used both at the beginning of a project and later to assess effectiveness.

Other methods of audience research include observation and interviews. These can be effective qualitative research methods to supplement the data collected by surveys and focus groups.

Chapter Summary

Audience research is Secondary or Primary. Primary research is:

- » Quantitative
 - › Surveys
 - › Intercept interviews
- » Qualitative
 - › Focus groups
 - › One-on-one interviews
 - › Observation
- » Quantitative data can tell us:
 - › Who, what, where, when and how
- » Qualitative data tells us:
 - › Why
 - › More depth

VII. WORKING TOWARD SOLUTIONS

When social issues are involved in your marketing efforts—even when you are marketing a compelling product—your audience may need to believe there is more than a financial benefit. In this chapter we will look at other types of benefits you may need to promote, as well as look more into the way branding, exchange, competition and social norms factor into decisions where there is a strong social component.

BENEFITS

With a growing number of studies concluding that coercion is not as effective in causing sustained behavior change as once thought, and the idea that facts alone are not enough motivation, how does one go about promoting alternate positive behaviors? Harvard business professor John Kotter believes that emotions are the answer. He asserts that behavior change happens mostly by speaking to people's feelings.*

Below is the same table that appears in Chapter 5. To get people to change their behaviors, you have to get them to believe one or more of the statements listed below about the new behavior you are promoting.

Self-Efficacy	"It's easier." "I know how to do it."
Actual Skills	"I've been trained in this."
Social Norms	"It's what I'm expected to do."
Perceived Consequences	"I get rewarded." "I'll get punished."
Self-Standards	"People like me do this."
Emotions	"I always pick the blue one."
Environmental Constraints	"I'll be in compliance."
Intention	"This is what I have decided to do."

These statements connected to the new behavior need to be even stronger than the statements connected to the current behavior, or there needs to be more reasons to adopt the new behavior. Think about why people change jobs. Perhaps the primary reason is more money. The new job may be closer to the person's home, or the insurance benefits may be better. Perhaps the type of work is more appealing. People don't typically make lateral or downward moves unless they are forced. People usually choose to improve their situation.

The same principle is true for any behavior change promotion anywhere in the world. Why would a person choose to go through the time, effort and expense to change their cooking stove in India? Are the health benefits enough? Does it also require being more convenient? How important is financial cost in the final decision? In India, all three reasons factored into the promotion and the success of the marketing effort to provide a better cooking stove to rural communities.

* Kotter, John P. *Leading Change*, ISBN 0-87584-747-1.

BRANDING

As discussed in the first chapter, a product's brand is its image, its identity. Branding often plays a key role in product success. Branding has currency value. A brand is the story. As we write that story we need to define where the brand begins and ends. What exactly is the purpose, need or value of that good or service? The brand determines the value of the product. It stands for something or necessitates a cause. The brand gives recognition to the product. The brand is the distinguishing name or symbol, logo trademark or package that identifies a good or service. In the case of branding for social reasons, if that brand is meaningful or helpful to the communities it is good for that brand and that community. Rather than the brand being the product, it is the sponsor. Instead of throwing parties for a brand, we throw a party for a product, and the brand is the link or hook to draw the customer to the event. The brand identity should create a distinctive capability, purpose or intent.

When building a brand it is important to remember why you are in business.

- » to sell
- » to stick around
- » to solve a problem
- » to really believe in what you sell
- » and to feel that your customers are in good hands.

Terms to keep in mind while building a brand are reality, simplicity, sustainability and sanctuary or the safety / assurance that that the customer can rely on. Telling a story that mentions the brand, which is talking about the product, telling its virtues or qualities and relating that story to the brand image is an effective part of marketing. The product must connect or have relevance to the brand image that has been created. The example of cook stove / Good fire. Telling the story about the stove, its virtues, health benefits, use of less fuel and cleaner burning relates to "good fire". The brand image connects to the product.

The products that are being marketed for Enterprise Works/ VITA are very genuine, straightforward products that enrich people's lives. The brand is not gimmicks, just truth and pure information. The brand gains credibility with a message that is best presented by a peer and shared by one neighbor to another. How does this product help me or my family / community, and what does the brand signify to me that creates this comfort or need? In examining the Niger use of the words Hausa or Djerma meaning "willingness and fortitude" to describe the treadle pump, we see a message that rings true to the local people. It has meaning, is true and straightforward. Similar is the term MANGALA used in India for the cook stove. The word infers the term auspicious (favorable, promising and positive). The message again rings of the value to that person, customer, family and community. For the another cook stove in Ghana the term Gyapa meaning "good fire" is the branding message. All these messages are simple, real and sustainable as well as meaningful to the customer.

In building the brand, care should be given to actively "build maintain and manage the four assets that underlie brand equity – awareness, perceived quality, brand loyalty and brand association."* The process is to develop the brand identification strategy and implementing that strategy in the market place. What is the message that rings true to your target audience? The key is to

* Aaker, Building Strong Brands, 35

create brand equity. Does it have meaning? Is it real, simple and sustainable? The challenge is to implement brand identification consistently across different situations, groups, villages or cultures.

EXCHANGE

“There’s no such thing as a free lunch.” “You can’t get something for nothing.” Those clichés say it all. Exchange is a key concept of social marketing. In commercial marketing there is a tangible item or product being marketed. The consumer offers a certain amount of money usually in exchange for a certain product. Most of the time social marketers offer something that may not seem worth the ‘price.’ When promoting manual drilling, you have a definite advantage of being able to offer a useful product and a social improvement. Think about it from the consumer’s standpoint. It always seems easier to stay with a current action than to adopt a new action. The current action is what seems normal. We are good at our current actions. If we are good at something we usually feel in control of that process. Control is hard to come by in this crazy world. Why would anyone want to give up the little bit of control they think they have? This is where you, thinking like the consumer, ask the simple question “What’s in it for me?”

The process thus far has involved determining the problem, identifying possible solutions in which your audience can participate, and learning about your targeted audience. Every step along the way you need to ask that simple question: “What’s in it for me.?” Conducting your audience research is to find out what your audience wants or needs to decide to take on a new behavior.

This is where the concept of positioning becomes important. The alternative may not seem worth adopting. The exchange itself is limited to what you give and what you get. How can you position or present a new product or behavior in a way that makes it worth adopting?

Commercial advertising often implies benefits that are hard to quantify and are even hard to believe. In social marketing, the claims should be more tangible and conservative. Once you have determined the behavior you want to change and the best way to position the exchange for your

Community Lead Total Sanitation--Zambia

Community Led Total Sanitation (CLTS) was piloted for the first time in Zambia in November 2007. Twelve communities were selected in Choma district and triggered by trained CLTS facilitators. For a total rural population of 4,536 sanitation coverage increased from 23% to 88% within a two month period. There was no evidence of open defecation to be found in 75% of villages and these were verified as open defecation free (ODF). It was estimated that 68% of constructed toilets met the Government’s definition of adequate sanitation and that the target for sanitation was surpassed in the pilot area in just two months. The role of traditional leaders was crucial in ensuring sustained action from communities.

At district level the respective chiefs of the two areas in which the pilot took place and the village headmen from all twelve communities also attended a workshop to familiarize them with the CLTS programme and triggering process. This was important to ensure that they understood the concept and were able to actively support and take place in the triggering in their respective communities. The chiefs involved are keen to scale up the approach to all the communities in their respective chiefdoms.

-P.A. Harvey & L. Mukosha

audience, you will be able start thinking about specific messages that will get your point across and prompt your audience to take action.

Exchange is a practice most people use many times a day, but one about which they rarely think. Some people are bargain and comparison shoppers, so the exchange in their commercial lives is very deliberate. Some people are very health conscious, so they think about the exchange involved in eating foods with processed sugar as opposed the natural sugar in fruit and other natural foods. The reality is, however, most of us don't think that much about the exchanges in our everyday lives because they are second nature to us. That is a challenge of social marketing. The exchange will be very conscious at first. Hopefully after time it will be second nature, and therefore sustainable.

In Niger, the promise or possibility of larger crop yields made the financial cost of the pump worthwhile. In the countries where improved cook stoves have been introduced, several health, safety and physical comfort issues combine to be worth the cost. In Zambia and other countries where Community Lead Total Sanitation campaigns have been successful, dignity and social conformity are part of the exchange. If you can say and show that other people like them do the behavior or use the product you are promoting, they may be more inclined to do so. In the example above from Zambia, having tribal leaders involved in the training sessions and behind the total sanitation program was critical to the program's success.

COMPETITION

Competition is a cornerstone of commercial marketing, but it also exists in social marketing. Competition exists on various levels. The obvious example of competition is between two similar products: Coke and Pepsi, two brands of biomass stoves, two treadle pumps, two pit latrine products. Competition can also exist between governments, such as local, regional and even national. In this competition, you have Product A and your competitor has Product B. They are similar products, positioned toward a similar market segment. Their quality and functions are even very similar. To stand out in the market you advertise Product A on radio and television throughout the country. Product B's manufacturer starts a similar campaign. You start a rural van tour with Product A, trying to create excitement in villages and towns between major cities. It turns out Product B's van tour is covering many of the same locations, sometimes before your product arrives. Now you have to refine your marketing strategy. Should you lower your price? Should you step up your advertising? These are the kinds of questions and issues that corporations face fairly often.

In your case, you may not encounter direct product competition. However, you will mostly likely face one of the other prevalent types of competition, competition against all the other media messages in the world and competition against existing behaviors

People are bombarded with hundreds or thousands of messages every day. Television, radio, the internet, billboards, bus benches, even community bulletin boards are all advertising mediums. Even though the rest of the messages your audience is exposed to may not be for product that directly compete with yours, your messages still have to compete with every other message to penetrate the consciousness of your audience members.

The other competition is with existing behaviors. As was mentioned earlier, people are often emotionally tied to their actions. It may be the way their parents and grandparents did things,

or their actions may be tied to their religious, political or philosophical beliefs. Once you have identified barriers and benefits you can promote, you must think of those benefits as competing with current behaviors. If the behavior or action you are promoting is only as good as the existing behavior, most people will stick with what they know. You have to show people the benefits that make the new behavior superior to the current action.

SOCIAL NORMS

Whether we want to admit it or not, most people are impacted by what people around them do and think—or might think. Social norms refer to the actions or beliefs that are acceptable and/or encouraged within a social structure. Just as with target audiences, the concept and definition of social structure can be very narrow or very broad. The more closed and confined a social structure, the greater the chance that social norms will play into an individual's decision making process.

Social norms are often equated to peer pressure, which is often equated to teenagers and school. While it is true that schools provide confined social structures and are good breeding grounds for social norms to be important, peer pressure and social norms can also be important to adults. Below is a partial list of closed and semi-closed social structures in which people can be impacted by social norms:

- » Schools
- » Churches/Mosques
- » Families
- » Work environments
- » Community organizations
- » Social clubs and organizations
- » Professional associations
- » Political groups
- » Neighborhoods

In the list above, neighborhoods are potentially the least closed social structure. Yet social norms can play a role in what neighbors do in view of other neighbors. In the sanitation example, part of the motivation to purchase a latrine relates to the improved social status of doing so and the stigma of not participating in the program. It may start small, with one or two households in a neighborhood participating. Word of mouth testimonials, observations of neighbors living an improved life, etc, may then provide the motivation needed for a few others to try the product or innovation. You may need to continue to promote the product at the same time, while the positive role models within the community are being noticed. At some point, however, critical mass will be reached and the behavior will have the momentum to diffuse on its own, as Dr. Everett Rogers noted in his book *Diffusion of Innovation*.*

Whether an innovative product or social trend catches on practically overnight, or if it builds momentum slowly over time, at some point there is a tipping point, as author Malcom Gladwell

* Rogers, E. M. (1995). *Diffusion of Innovation*. New York: The Free Press.

puts it, in his book by the same name.* Gladwell closely examines why change happens as quickly and unpredictably as it often does. He looks at how ideas, trends, and social behaviors reach a certain threshold, the 'tipping point' where they then spread at an unprecedented rate. While innovations can spread at various rates, there are three types of people within a social system that can help move an innovation along at a faster rate. Gladwell refers to these people as connectors (often influential people who are tied to several groups and social structures), mavens, who are the reporters or informers of an innovations and the salesmen, who are actively persuasive.

A key to using social norms and relying on social diffusion is engaging the best agents of change. Who are the people within a community, interest group, school or organization who fit into the three categories Gladwell described? These may or may not be the elected or appointed leaders but they have a charisma and magnetism that attracts attention and interest. These people are often the opinion leaders and change agents. If they adopt a new behavior and/or tell others about it, it will spread faster than if a more non-descript member adopts the behavior. While it is important to get as many people as possible to adopt a new behavior, the opinion leaders can help the behavior diffuse faster and wider.

When deciding which behavior change approaches will work best for your audiences, keep in mind that the more closed the community, the more effective social norms usually are at changing behaviors. In rural areas with tribal social and governmental structures, as is the case in Zambia where community lead total sanitation efforts took place, social norms play a pivotal role in changing behavior.

IDENTIFY LIKELY SOLUTIONS

The baseline scientific data will probably indicate the possible solutions. In this step you will sort the possible solutions based on whether they can be accomplished through social marketing, the potential cost, the potential time each solution will take, and other factors that may pertain to your issue. In the hybrid marketing model, the technology or product chosen represents the solution to the social problem.

It both Niger and India, project coordinators understood the commercial and social need that their product could fill. The treadle pumps filled a consumer need of the farmers who were looking for ways to get more water out of the ground to grow more food and make more money. It also helped solve a societal problem, because local residents need the fresh healthy food for survival and good health. The new biomass stoves were more efficient, requiring less fuel and cooking faster, but more importantly they could improve indoor air quality.

Chapter Summary

The information in these few pages is critical to the success of your marketing and social marketing efforts. Once you have segmented your audiences and identified possible barriers and benefits from background research, you'll have the opportunity to validate your findings and further explore barriers and benefits by using formative audience and market research methodologies including surveys and focus groups. This will be the subject of the next chapter.

* Gladwell, Malcom (2002). The Tipping Point: How Little Things Can Make a Big Difference. Little, Brown & Company ISBN-13: 9780316346627

VIII. TESTING MESSAGES & TOOLS OF CHANGE

If it seems as if this manual keeps returning to audience research, it's largely due to the importance of audience research in many phases of your campaign.

In this chapter we will briefly discuss using focus groups to test specific advertisements, brands, slogans, messages, and other outreach materials. You may not be ready to test messages earlier in the process when you are determining knowledge about an issue, barriers and benefits. So, you could conduct some qualitative research at different phases of your campaign. However, it may be possible to determine barriers, benefits, knowledge, attitudes and practices from background research and/or quantitative research. This will allow you to save the focus groups for testing messages, approaches and products.

We will also look at behavior change approaches, including social norms, prompts and commitments.

MESSAGE TESTING

As mentioned in Chapter 1, messages should be clear, concise and include a call to action. In social marketing, the call to action is usually a behavior that will improve the health or some other aspect of the lives of audience members. In your case, the product you want people to buy and use will have that positive effect on their lives. Consequently, like most product marketers, the messages you promote will usually stress the positive impacts using the product will have on the lives of audience members. Specifically, the three things your message should do are:

- » Capture the attention of the audience
- » Be meaningful in their daily lives
- » Be short and simple

In Niger, the main benefit promoted was how much water the pumps brought to the surface and moved across the crops. One TV advertisement, for example, showed the discharge from the pump and had the farmer's neighbor exclaim, "Wow that is water!!!" Secondary messages stressed that the pump is easy to use, it is not expensive, it does not need fuel, repairs are simple, and local availability. The visual of the water being pumped and the exclamation of the farmer's neighbor capture the attention of the audience. The efficiency of the pump, plus the secondary benefits that stress the pump's quality and that it is cost effective, are messages that are meaningful in the daily lives of the audience. Each of the messages alone, and even as a group, are short and simple (KISS).

There are many ways to test the effectiveness of your messages. Individual interviews, a few questions within a survey and message testing focus groups can all be effective to determine whether a brand and a message concept resonates with the audience and moves them toward action. In Niger, the messages were tested during demonstrations with farmers.





Regardless of the forum you use to test your messages, audience members will usually provide richer comments if they see finished or draft products. However, whether it is a one page flyer, a brochure or a television commercial, it takes at least some time and money to create demonstration messaging products that may never be used in your campaign. Yet, untested messages may not resonate with your audience. One way to test finished messages is to test the brochures, ads, displays, etc that were used in similar projects in other places. Language or cultural differences may be too much to overcome, but if there is something from a similar project

that can be tested, your chances of determining the best messages for your audience increase greatly.

A key to effectively testing messages is to give your audience as much as possible to which they can react. In the logo above for the Soka pump, the brand name and art work give people the opportunity to react. The Mangala stove ad from India offers multiple photos, the brand name and art work, a slogan, and a few listed benefits. The decision is yours as to how much to test with your audience. Some people are successful just testing the words of the brand. Others want the artwork when they test. Or you may even choose to have a full blown campaign ready to test.

One way to cut costs of developing materials is to test similar concepts that have already been developed for other areas. Often times, organizations will create their basic brand art work but test advertising or other messaging concepts that have been developed for campaigns elsewhere.

BEHAVIOR CHANGE TOOLS

Once you have tested messages and your brand on your target audience, you must design a behavior change approach that will be effective for your audience and you need to choose a mix of mediums that will reach them. Mediums and media mix will be discussed further in the next chapter. In the meantime, here are a few of the more prominent behavior change approaches that are often used in social marketing and product marketing campaigns.

Prompts

Prompts have many similarities to social norms. Prompts are designed to remind people to engage in environmentally friendly, healthy, or otherwise socially responsible behaviors. A sticker on a light switch reminding people to turn out the lights when they leave the room is an example of a prompt. Because a prompt reminds a person to do something or not do something, you may not use prompts often in your hybrid campaigns. The product itself should be the reminder. If there is a concern over improper use of the product, then a prompt, or reminder placed near where the product is used could be helpful in achieving the social goals of the campaign. Like a message near a manually drilled well saying in pictures “do not wash clothes here.”

Commitments

Commitments are a great way to turn good intentions into positive behaviors. Every year in

elementary schools throughout the United States, students agree to read so many books or so many hours in exchange for possible prizes. These read-a-thons, as they are often called, have a good track record of success. The children usually make the commitment because of the lure of prizes or glory. They often stick with it because they have made a promise in front of their teacher and classmates. Their parents usually know about the promise as well. In other words, there is a lot of pressure to succeed, in addition to any reward waiting for them at the end.

Sometimes in commercial marketing a commitment may be in the form of a money back guarantee. It may look like the company is making the commitment, and it is, but the consumer went to the effort to purchase the product. Even though they may be able to bring it back during the money back return period, they are making an informal commitment to give the product a fair trial.

Incentives

No matter how altruistic someone's actions appear to be on the surface, and no matter how altruistic that person may believe his or her actions are, everybody is motivated on some level by the "what's in it for me" mentality. It is human nature to want something in return for something given.

Earlier we discussed the marketing principle of exchange and the concept of price as it relates to social marketing. Incentives can be a way of offering people something in exchange for the "price" of the action they take. When it comes to a product, the incentive may be a discount or a rebate. The incentive could also be an unrelated free gift or a discount to some other product or service.

Conformity

Conformity is one of the tools used in a social norms approach to changing behavior. In communities throughout the world there are groups of people who share religious or political beliefs, or share social conventions such as the way they dress, the length of their hair, even the roles men and women play within a family structure are similar within some social structures. Conformity may not seem like a behavior change tool, like offering an incentive is a tool. But just as one might market a product or behavior by offering a financial incentive, one might market the same product or behavior by offering the chance to be like an important person in their social system, who already uses the product or engages in the behavior.

The Total Community Lead Sanitation case described in Chapter 7 is a good example of marketing conformity as part of a social diffusion approach to marketing. In that example, influential members of tribal society were part of the marketing campaign. District chiefs of the two areas in which the pilot took place and the village headmen from all 12 communities also attended a workshop to familiarize them with the Community Lead Total Sanitation program and the triggering process. These leaders and their support for the initiative has been essential to its success.

Complete the chores of cooking at lightning speed

Save fuel expenses, time & money

MANGALA
New generation stove for the intelligent

Reduces the ill-effects of smoke

The advertisement features a woman in a sari smiling next to a MANGALA stove. Below the main image are three smaller images showing the stove from different angles. The text is in red and green, with the brand name 'MANGALA' in a large, bold, green font.

Compliance

Compliance is another social norms approach tool. Compliance is not used to sell products in a free market system, unless the product is required by law or regulation. Compliance is most often used to sell behaviors that are required but are difficult to enforce 100 percent of the time. In the sanitation example, if the tribal chiefs had announced that pit latrines were now mandatory, it would have been a compliance-based marketing effort.

Chapter Summary

Testing your messages and branding with your target audience is a critical step in the marketing and social marketing process. Amid all the messages that bombard people in their daily lives, your message must stand out and resonate with your audience. In order for your audience to hear the message and act on it, your message must:

1. Capture the attention of the audience
2. Be meaningful in their daily lives
3. Be short and simple

You should develop your brand and logo if possible to test, but you can also test materials for similar campaigns that have already been developed in other locations. Even if the brand is different and the language is different, people may react to an image or even a color scheme that could be used in your campaign.

Along with testing messages, your audience research can help you determine how effective behavior change approaches might be. Will social norms using conformity or compliance be the key factor in promoting the product and action? Perhaps incentives are the key? Continued use could be ensured by prompts or commitments. Testing these concepts along with the product can go along way toward shaping key components of your campaign.

IX. IMPLEMENT YOUR CAMPAIGN

This is where your staff, partners and community resources can really help. Some campaigns have a significant community-based component, which may include giving presentations at meetings or schools, doing demonstrations or sharing information at events or as part of a van tour, and even knocking on doors or passing out information. These methods are labor intensive, but usually less expensive. Interpersonal approaches are often only as effective as the people conducting the programs. If you use volunteers, train them well and provide them with some sort of incentives. If you use partner groups, make certain the people you use from those groups share your level of commitment.

In India, the van tour to conduct presentations and get people excited about the stoves went very well in most cases. However, in at least one case, the van team was not very consistent or effective. The result was less than optimal in those cases.

On the other hand, if your campaign is mostly mass media in nature, you will probably need a lot less manpower support from staff, volunteers and partners, but you will definitely need a lot more money.

Repetition is the key to learning and taking action. People need to hear your message several times for it to sink in. This is why the media mix is so important. The Keep America Beautiful “crying Indian” campaign mentioned at the beginning of Chapter 1 combined the effective mass media campaign with local efforts throughout the United States. Local information dissemination and litter collection teams were assembled. Giveaway items such as trash bags displayed the campaign logo as a way of further branding the message. Local news media outlets were invited to local clean-ups. The campaign was present at local fairs and festivals. This mix of media continued until the campaign ended in 1983.

Giveaway items, personal appearances, news media coverage, door knob flyers and many other methods of distributing a message can complement mass media and provide the repetition needed for otherwise disinterested people to take notice.

The EWV Niger example also relied heavily on both mass media and community based marketing approaches. The messages were distributed directly through live demonstrations at market days, agricultural fairs and at gardening sites. In addition the message was aired on national TV and radio and also on both regional and rural radio. Rural radio combined the messages with user interviews.

The stove project in Ghana used many of the same implementation approaches. Both social and conventional marketing methods were used to promote Gyapa stoves. These included TV and radio advertisements, newspaper promotions, cooking demonstrations on market days and quizzes. Project leaders also ran educational campaigns in seven locations, mainly for women, on the dangers of inhaling smoke from cooking stoves. These campaigns included a 10-minute documentary film and advice on the need for good ventilation and to avoid inhaling smoke wherever possible, regardless of stove choice.

Implementation

- » Use your research to this point to pick the best mix of community-based and mass media approaches—and go for it!
- » Document everything you and your partners do in the name of the campaign,
- » Incorporate earned media (news coverage) into your campaign, whenever possible

Techniques like the 10-minute documentary film can be very effective methods of educating your audience. When viewing the video and answering questions after are required for the chance to win a prize, local residents will pay great attention to the presentation.

As you implement your campaign, it is important to track all of the approaches and mediums being used. This is not only for evaluation and campaign refinement reasons, but also to make sure nothing is being forgotten or neglected.



It is also important that your implementation proceeds in an order that will maximize results. For example, in a campaign that is fairly evenly mixed between mass media and community based approaches, the mass media is often rolled out in waves, followed each time by more intensive community based approaches. Television and radio ads might announce a new pump product and then shortly thereafter a demonstration is planned in a community to show off the features of the pump in person and actually let local residents try it themselves. For those people not in a position to buy right then, giveaway items such as hand fans or pens with the product's name on them serve as prompts to keep the product in people's minds. Then the next wave of radio or television ads hit the airwaves. This may be followed by pumps showing up locally in the gardens or small farms of neighbors or nearby residents. The order in which the media is rolled out builds upon itself and then begins to lead to social diffusion and a new social norm, one where intensive advertising and community based marketing efforts are not needed as much, if at all.

Adjustments

- » Adjustments are a natural part of the social marketing process,
- » Check in with your plan often,
- » Check in with your partners periodically,
- » Check in with your audience as often as possible
- » Adjust as needed.

Campaigns rarely go off that smoothly. Timetables get moved up by funders, implementation schedules get moved back by manufacturing problems, advertising efforts get slowed or don't go as planned. There are many ways run into glitches. Once again, don't wait until the very end to adjust. It's like driving somewhere new: the time to turn around or ask for directions is when you first realize you are lost. Going through the social marketing process is like asking for detailed directions in advance. But if you still get lost or make a wrong turn, your continuous monitoring of your progress will allow you to check back in with your map (your audience, baseline data, institutional barriers, etc.) to determine how to proceed.

Adjustment could be needed early on during planning, during product development, during campaign development, or during implementation at any point. It's not feasible to predict when you may need to adjust because every effort is different and your audience is always the wild card. The way to know when to go back to the drawing board is to pay attention throughout the process.

In Niger, the pump was redesigned to make it smaller and less expensive while maintaining the same flow rate. This was done based on feedback from farmers. The new pump was named compact. There was limited promotion of the new pump because the project was winding down.

In India, a critical issue with the Mangala stove was the PRICE – the cost of the production was higher than the price that the market would accept, so at the pilot stage the product had to be subsidized. The manufacturer and project developers had to reduce cost using alternative materials, and increasing efficiency of production at the production/assembly plant. At the marketing level, pilot stage refinements were required with the van campaign, in some areas the van promotion team was excellent and handled the client group questions and follow up effectively. In a couple of instances, when the campaign first started, this was not done well and it affected the sales at that village. However, discussions with the van crew and management yielded positive results as the campaign continued.

Chapter Summary

Once you have determined your messages, marketing approaches and media mix, implementation can begin. It is critical to keep track of the various implementation elements and keep them in check and on schedule. Often times, you will need to roll out the aspects of your marketing mix in a specific order

Finally, refinements and adjustments are a natural part of marketing efforts. Very few marketing campaigns go off without encountering some problems or glitches. Adjustments may be needed at any point from planning through implementation.

X. EVALUATION

When people put their money into an investment they expect a return. History, industry reports, company projections and other indicators help set a level of expectation in the mind of investors. If the investment doesn't live up to expectations, chances increase that a significant portion of the investors will take their money elsewhere. The same thing is true for public sector and private sector funding of social programs. Whether the money to fund a project comes from a foundation attached to a large corporation or a government entity, results will determine if they fund future efforts.

The purpose of a social marketing program is to affect some change in the target audience's attitudes and behaviors.* With that in mind, it is important to note that program evaluation of social marketing can serve two important functions. First, it can assist in providing feedback to support refining and improving activities. Second, it can help to establish the effect and hence the accountability of the program.† On the commercial marketing side, the goals can include making money for the company or companies involved in the product development, manufacture and distribution of the product. Another goal is to employ local workers. Finally, a goal of any product-driven marketing campaign is to provide a quality product that makes a positive impact on the lives of the consumers of that product. This is especially true in the Enterprise Works/VITA model, where the positive impact may improve health or even save lives.

EVALUATION TYPES

One of the first things a project sponsor needs to determine is what to evaluate. Evaluation is often divided into categories such as:

- » Process evaluation
- » Outcome evaluation
- » Impact evaluation.

To stay consistent with our terminology, impact evaluation attempts to verify long-term outcomes, as they are called in the logic model, which appears on the following page. It also appears as a stand-alone page in Appendix I.

The logic model has seven columns: objectives, baseline data, inputs, activities, outputs, short-term outcomes and long-term outcomes. The first five columns (objectives through output) constitute the information that will go into your process evaluation. Using the information from the five columns to the left, you will conduct outcome evaluation to measure the short-term outcomes and long-term outcomes.

PROCESS EVALUATION

As with every aspect of a marketing or social marketing campaign, you must be thinking about

* *Hands-On Social Marketing: A Step-by-Step Guide* by Nedra Kline Weinreich. 1999. Sage publications

† *Social Marketing: Strategies for Changing Public Behavior* by Phillip Kotler and Ned Roberto, 1990. Simon and Shuster. ISBN: 0029184614

evaluating the process from the very beginning. Having said that, process evaluation is the most straightforward of the evaluation methods typically used in marketing campaigns because the answers are more often obvious. It is easier to determine if you did what you said you would do than to verify changes in attitudes and behaviors, especially when the results are self-reported rather than observed or scientifically measured.

The first thing you must determine is what to measure. Did you collect the needed baseline data? What data did you collect and what did the data tell you about your issue and your audience? Did you tap into all of your potential partnerships, stakeholder groups and community resources for support? Did you develop and test a theme, message and products for your campaign? Did the target audience receive and recall your message? Did you stay on schedule? Did you stay on budget? In your project, you may choose to evaluate the marketing effort separate from the product development and manufacturing efforts.

You'll notice in the questions above that we stop short of asking whether the campaign changed attitudes and behaviors. You may ask those questions at the same time you ask your audience whether they were exposed to the message, but we will talk more about those questions in the next section.

The research method used will vary based on the question you are trying to answer. Internal staff reports or tracking sheets could be used to determine collection of baseline background data, contact with partners and stakeholders, attendance at planning meetings, etc. Reports from vendors or consultants can verify completion of tasks including conducting market research and creating media products. Media outlets can provide lists of dates, times, issues, etc. when your messages were aired or published. Tapes or printed copies also serve as documentation.

Follow-up marketing research is used to track audience exposure and reaction to your media messages. You should target the same audience you targeted during the audience assessment phase. You will ask largely the same questions to assess changes in knowledge, attitudes and actions in the time between the two assessments. You may not need to test as many process variables related to receiving the message in your project, since tracking the outcome of sales and use of the product will help answer some of the questions related to the effectiveness of the process.

For the community-based approaches used as part of the overall social marketing effort, many possible evaluation methods exist. They include attendance at presentations, meetings etc.; pre and post tests (or informal questions and answers) at demonstrations; the number of fact sheets or prompts taken from a point of sale display; the quantity of giveaway items distributed; the number of hits on a website; or the number of phone calls to an information hotline number or sales line.

OUTCOME EVALUATION

Short-term Outcomes

Evaluating outcomes is similar in some ways to evaluating the social marketing process. First, you must plan your evaluation strategy at the beginning and check in along the way to make certain you are on course. Second, you need to have definable goals and measurable objectives and tasks. Finally, you need to have baseline data before you begin from which you can show improvement.

The short-term outcomes in social marketing refer to attitude adjustment and behavior change. Some projects add a medium range outcome, which they use to quantify behavior change separately from attitude adjustment.

As you create your outcome evaluation plan, ask yourself what you are going to measure and how you are going to measure outcomes. Some of the measures can come from follow-up surveys, just as with process evaluation. Scaled questions that ask people how likely they are to engage in a certain behavior can be used to show attitude adjustment. Questions asking if people actually engage in a new behavior, and how often, can show behavior change. Product sales are a good tracking method for the production goals, but continued proper use of the product may be what is required to achieve the social goals of the project. Evaluating that part is a bit tricky.

The problem with surveys is that they are a form of self-reporting. There is no independent verification of what a person says. However, you can take sales of pumps and self-reported proper use of the product and also track garden production, improved nutrition, and other indicators that garden and farm production related to water availability have increased.

Long-range Outcomes

The actual impact of the social marketing program is often difficult to assess accurately.* Even if it's difficult to attribute a specific percentage of environmental improvement to the social marketing efforts, it is reasonable to suggest that documented positive changes in behavior can only be helping. Of course, short term outcomes such as better crop yields this year from using the new pump or the immediate improvement to a village that can be seen by an increase of the number of pit latrines, may be leading to long range improvements in health, financial sustainability or other benefits, but those long range outcomes are more difficult to document.

This brings us to an important key to successful project evaluation: never promise more than you can deliver. Most outreach and social marketing projects never get past the short-term and medium term outcomes, because real impacts take longer than the life of the funding cycle. Keep your goals achievable and plan in advance, and you should be able to successfully evaluate your project.

EVALUATION LEVELS

Another way to look at output and outcome evaluation is to break down the effectiveness of your campaign into an evaluation hierarchy. The following five levels of evaluating effectiveness are based largely on the work of Donald and Kirkpatrick and Tom Gusky, who were researching the effectiveness of training programs.†

The five levels are:

- » Reaction
- » Learning
- » Action
- » Local Diffusion
- » Widespread Diffusion

*Kirkpatrick, D. (1975). "Evaluating Training Programs". Madison, WI. American Society for Training and Development.

† Gusky, T. (1998). "The Age of Our Accountability". Journal of Staff Development. Fall, 36-44. National Staff Development Council.

Logic Model Example

Objectives	Baseline Data	Inputs	Activities	Outputs	Short-Term Outcomes	Long-Term Outcomes
What do we want to achieve for target population?	Identified Need	Resources, Collaborations, Planning	Elements, Components, Schedule / Scope	Quantifiable Deliverable items	Evaluation, Activity, Measurement	The Cumulative Effect of Short-term Outcomes
Goal 1:						
1.1						
1.2:						
Goal 2:						
2.1						

- » Goals are overarching benefits for society.
- » The table can have as many goals and objectives under each goal as needed.

Reaction

Anytime people are exposed to a message they have a reaction. Smiling is a reaction, as is frowning, yawning and raising one's eyebrows. Seemingly no reaction at all is still a reaction.

In this first level of evaluation, project sponsors may simply try to determine if people remember receiving the message, and, if they remember the message, what did they think of the message?

Learning

At this level, project evaluators are not only interested in knowing if the audience received the message and how they reacted to it, they are also trying to determine if the message had the desired educational effect. At a local demonstration of a cook stove or a pump, did community members learn enough about the use and benefits of the product to be able to make an informed decision about whether to purchase and use it?

Action

This is the point where many programs stop measuring effectiveness. To this point, many funding organizations will deem behavior change projects successful if the targeted audience received and liked the message, if they learned from the message, and if they acted upon the message. As time goes on, more and more funding organizations will ask for more.

Local diffusion

At this level, evaluators are looking to determine not only that targeted audience members received and acted upon the message, but that they also spread the word to people within their immediate sphere of influence.

Widespread diffusion

Once the initial targeted audience members have acted upon and spread the message, the hope is that those people will, in turn, act upon and spread the message. In the case of some of the total community sanitation programs, the belief is that once there is a significant level of widespread diffusion, system change will start showing up in the environmental health and human health within each community.

CHAPTER REVIEW

Evaluation is a key factor in any social marketing program. It provides the measurement of success necessary to continue to obtain funding and community support. Proof of progress also helps keep target audiences motivated.

Typically three types of evaluations are used in social marketing efforts:

- » Process evaluation
- » Outcome evaluation
- » Impact evaluation

Process evaluation looks at the planning, partnerships, timelines, and budgets of a program, among other things. Process evaluation tells funding organizations if project sponsors did what they said they would do, and if it was done on schedule and budget. Many times you include whether the audience received the message in the process evaluation.

Research methods used range from internal reports and tracking sheets to primary and secondary marketing research. Reports from project partners, vendors and consultants may also be used as part of the process report.

Outcome evaluation indicates whether people changed their attitudes and behaviors based on your project. Follow-up quantitative and qualitative audience research methods are used to determine attitudinal and behavior change. Surveys, focus groups, individual interviews, intercept surveys and observation are among the more popular methods of collecting information on behavior change.

Impact evaluation indicates long-term successful outcomes. In the case of watershed improvement efforts, the long-term outcome is improved water quality of some sort. This can take a long time to show. The evaluation methods in the case of watershed projects are usually scientific-based water quality modeling and monitoring.

Summary

Evaluation planning needs to begin before the project starts. Common evaluation types include:

- » Process evaluation
 - › Did you do what you said you'd do?
 - › Was it on time?
 - › Was it on budget?
 - › Did your audience receive your message?
- » Outcome evaluation
 - › Did attitudes/behaviors change?
- » Impact evaluation
 - › Did health improve, etc?

XI. APPENDIX

SAMPLE SOCIAL MARKETING PLAN MATRIX

Project name or area _____

Category	Statement/Description
Define the Problem (Baseline scientific data)	
Identify Possible Solutions (Including structural and behavioral actions. The exact behavior(s) you choose to promote may be refined or changed once your have conducted audience research.)	
Assemble Your Team and Assess Community Resources	
Conduct a SWOT Analysis (Examine the internal strengths and weaknesses of your team and the external opportunities and threats that could present themselves)	
Identify Target Audience(s)	
Assess Audience Knowledge, Attitudes and Practices (Baseline social data)	
Competition (...with a current behavior, other social and commercial messages, etc. Examine barriers to change)	
Exchange (What are you offering in place of the audience's current behavior(s)? What's in it for them? How does it benefit them?)	
Develop Potential Messages	
Test Messages (Focus groups or discussion groups)	
Choose Mediums (Think of both mass media and community-based mediums and methods)	
Implementation Plan (Identify who will do what and when. You may want to create a separate implementation schedule document)	
Evaluation (You'll look at inputs and outputs [internal], and outcomes [external]. Outcomes may be short range, medium range and/or long range)	
Adjustments / Refinements	

LOGIC MODEL EXAMPLE

Objectives	Baseline Data	Inputs	Activities	Outputs	Short-Term Outcomes	Long-Term Outcomes
What do we want to achieve for target population?	Identified Need	Resources, Collaborations, Planning	Elements, Components, Schedule / Scope	Quantifiable Deliverable items	Evaluation, Activity, Measurement	The Cumulative Effect of Short-term Outcomes
Goal 1:						
1.1						
1.2:						
Goal 2:						
2.1						

- » Goals are overarching benefits for society.
- » The table can have as many goals and objectives under each goal as needed.

BEHAVIOR/MESSAGE WORKSHEET

Current Behavior/ Problem	New Behavior	Possible Message(s)

NEW BEHAVIOR/PRICE/EXCHANGE WORKSHEET

New Behavior	Price	Exchanged for (Benefits)

RELATED WEBSITES

The following Websites are divided into categories based on what they offer. Most of the sites below are generic or are focused on subject matter not related to water quality or the environment. However, since social marketing skills are transferable between topics, there may still be a lot of good information for you on these sites.

General Social Marketing Education

- » The Academy for Educational Development—Washington, D.C. <http://www.aed.org/SocialMarketingandBehaviorChange/>
- » The Central Center for the Application of Prevention Technologies—Minnesota. http://www.ccapt.org/sm_skills.html
- » University of Kentucky, Community Toolbox—Kentucky. <http://ctb.ku.edu/tools/implement-socialmarketing/index.jsp>
- » Higher Education Center. <http://www.higheredcenter.org/socialnorms/>
- » The Human Society of the United States, online introduction to social marketing. http://www.humanesocietyu.org/workshops_and_classes/social_marketing.html
- » Health Canada. http://www.hc-sc.gc.ca/ahc-asc/activit/marketsoc/index_e.html
- » Semantic Studios, social network analysis. <http://semanticstudios.com/publications/semantics/000006.php>
- » Social Change Media, The Seven Doors Social Marketing Approach—Australia. <http://media.socialchange.net.au/strategy/>
- » University of California-Davis, Center for Advanced Studies, California. <http://socialmarketing-nutrition.ucdavis.edu/somark.htm>
- » National Cancer Institute. <http://www.cancer.gov/pinkbook>

Marketing Research Sites

- » Statpac Survey Software company. <http://www.statpac.com/surveys/question-qualities.htm>
- » Creative Research Systems. <http://www.surveysystem.com/sdesign.htm>
- » University of Texas-Austin. http://www.utexas.edu/academic/diia/assessment/iar/how_to/methods/survey.php
- » Sy Survey. http://www.sysurvey.com/tips/designing_and_conducting.htm
- » WGBH and the Corporation for Public Broadcasting. <http://enhancinged.wgbh.org/process/evaluation/focus.html>
- » Northeastern University Educational Technology Center. <http://www.dac.neu.edu/ire/pdf/focusGroupChecklist.pdf>
- » Fairfax County Department of Systems Management for Human Services. <http://www.fairfaxcounty.gov/demogrph/pdf/questionnairedesign.pdf>
- » University of Baltimore. <http://home.ubalt.edu/ntsbarsh/stat-data/Surveys.htm#rss>
- » University of Syracuse. <http://web.syr.edu/~iguzmand/ist820fg.pdf>

Evaluation Resources Sites

- » International Mentoring Association. <http://www.mentoring-association.org/MembersOnly/Process/ProgrEvalModel.html>
- » University of Tasmania. <http://www.utas.edu.au/pet/sections/developing.html>
- » National Science Foundation. http://128.150.4.107/pubs/2002/nsf02057/nsf02057_1.pdf
- » The Global Social Change Research Project. <http://gsociology.icaap.org/methods/>

BOOKS AND VIDEOS

- » Berkowitz, E.N.: Kerin, R.A.: Hartley, S.W.: Rudelius, W. Marketing, 5th ed. Chicago, Ill: Irwin 1997
- » Community Culture and the Environment, EPA 2003. <http://www.epa.gov/ecocommunity/pdf/ccecomplete.pdf>.
- » The Focus Group Guidebook, by David L. Morgan, Portland State University. Focus Group Kit Volume 1. ISBN 0-7619-0818-8. 1998.
- » Planning Focus Groups, by David L. Morgan, Portland State University. Focus Group Kit Volume 3. ISBN 0-7619-0819-x. 1998.
- » Planning Focus Groups, by David L. Morgan, Portland State University. Focus Group Kit Volume 2. ISBN 0-7619-0817-x. 1998.
- » Involving Community Members in Focus Groups, by Richard A. Krueger, University of Minnesota & Jean A. King, University of Minnesota. Focus Group Kit Volume 5. ISBN 0-7619-0820-x. 1998.
- » Kotter, John P. Leading Change, © 1996 John P. Kotter. ISBN 0-87584-747-1.
- » Rogers, E. M. (1995). Diffusion of Innovation. New York: The Free Press.
- » Mohr-McKenzie, Douglas; Smith, William. Fostering Sustainable Behavior: An Introduction to
Community-Based Social Marketing. New Society Publishers, Gabriola Island B.C. Canada. 1999.
- » Mohr-McKenzie, Douglas; Smith, William. Fostering Sustainable Behavior: An Introduction to Community-Based Social Marketing. New Society Publishers, Gabriola Island B.C. Canada. 1999
- » Getting in Step: A Video Guide for Conducting Watershed Outreach Campaigns. June 2003. USEPA Office of Water, Washington D.C. EPA 841-V-03-001.
- » Getting in Step: A Guide for Conducting Watershed Outreach Campaigns. June 2003. USEPA Office of Water, Washington D.C. EPA 841-B-03-002.
- » Hands-On Social Marketing: A Step-by-Step Guide by Nedra Kline Weinreich. 1999. Sage publications
- » Social Marketing: Strategies for Changing Public Behavior by Phillip Kotler and Ned Roberto, 1990. Simon and Shuster. ISBN: 0029184614





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