

The Arcus Foundation

**Driving Behavior Change  
Through Communications:  
Campaign Insights, Successes,  
and Lessons Learned**



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## Preface

*This report was commissioned by the Arcus Foundation to inform its exploration of behavior change communications strategy and as an open resource for its grantees and the wider conservation and social justice movements. Initially written with a focus on the needs of conservation campaigners, content has been added to support those working in social justice and other areas as well. The goal is to provide insights into behavior change or social marketing (terms used interchangeably in the report) theory and campaign planning. The report also identifies a number of successful and not so successful campaigns— from a host of issue areas – to educate and inspire future campaign work.*

## I. Methodology and Acknowledgements

The report includes interviews and discussions with Arcus program staff, grantees and partners, experts in the field of behavior change communications, and representatives from campaigns that were selected for inclusion in the report. It also includes commentary on and analysis of behavior change theories, campaigns and other innovative programs. Thanks to the numerous interviewees who helped inform the report:

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The report includes numerous verbatim quotes from the interviewees, some of which were gently edited for clarity. Opinions expressed in the report are personal opinions of the individuals. Campaigns and other data and information in the report reflect the author's direction, with guidance from the Arcus Foundation.

## II. Executive Summary

As part of its commitment to social and environmental justice, the Arcus Foundation is interested in exploring how individuals and cultures change. This report takes a closer look at behavior change, and how well-planned and well-executed campaigns and programs have the capacity to effect lasting change.

The report was informed by interviews with Arcus staff, grantees and others in the field to help define the challenges organizations face that are attempting to do this kind of work. It contains interviews with experts in social (behavior change) marketing, advertising and communications, and an analysis of 18 campaigns and programs on a host of topics from around the world that represent best practices in the field. It also includes feedback and input on the report from two workshops conducted with Arcus staff, grantees and representatives from other social and environmental justice organizations.

The report comes at a time of considerable change in both the field of conservation and in the LGBT rights movement, the two program areas where the Arcus Foundation focuses its resources and strategies. The conservation movement has seen a framing shift in the relationship between people and nature over the decades. Similarly, the global LGBT rights movement is working simultaneously on issues ranging from recognition, legitimacy, protection, marriage equality, as well as organizing the LGBT community to support other key causes.

Interviews with Arcus staff, grantees, partners and experts suggest there are a number of obstacles that conservation campaigners face in developing behavior change communications campaigns; many of these issues are prevalent in social justice campaigning as well. These obstacles may be interrelated. Some of the key issues that surfaced during these discussions include:

- **Inadequate planning** – not conducting a situational analysis of the environment or fully engaging all stakeholders.
- **Outcomes/metrics not clearly defined** – defining the desired behavior change and how it can be measured.
- **Sponsor issues** – an inability of the donor organization to clearly articulate objectives or processes to follow.
- **Budgets** – lack of budget for adequate planning or for sustaining campaigns.
- **Reaching audiences** – lack of resources for media placement of messaging.
- **Lack of collaboration** – not researching and learning from what others have done in the past or joining forces with like-minded groups for greater impact.
- **Mission creep into international development** – how conservation campaigns can face challenges when working with extremely poor audiences.
- **Predictable and uninteresting messaging** – the tendency for social issue campaigners to preach from a soapbox and not think about engaging (and entertaining) their audiences.

Behavior change theories and the developing field of behavioral economics also offer much to the social issue campaigner. The diffusion of innovation theory is a tool that can be used by campaigners for segmenting audiences and for planning when education and advocacy efforts are needed. Other behavior change theories and behavioral economics principles can be applied on a case by case basis depending on the campaign issue, audience and environment.

A number of campaigns and projects from around the globe demonstrate innovative practices that can be applied by conservation and social justice campaigners:

- **Project 50% – UK/Conservation:** Worked with its fisherman population to develop the campaign idea and a physical product to serve its audience.
- **The Truth Campaign – USA/Teen Smoking Prevention:** Created a brand to challenge its industry competitors and used outrage to build support.
- **Intersexions – South Africa/AIDS Prevention and Testing:** Used the power of drama and entertainment to educate while entertaining.
- **Seafood Watch – USA/Conservation:** Built grassroots demand for more environmentally-friendly seafood choices.
- **Adoption From Foster Care – USA/Social Service:** Reframed the conversation about children in foster care to build greater demand among potential parents.
- **Diabetes Association – Sri Lanka/Health Promotion:** Invented a physical product to help reduce intake of sugar among tea drinkers
- **Lucky Iron Fish – Cambodia/Health Promotion:** Created a culturally-relevant product that cheaply and easily increased daily iron intake.
- **Bell Bajao – India/Domestic Violence prevention:** Reframed violence against women to engage untapped audiences to help deliver change.
- **Stop Shark Finning – International/Conservation Advocacy:** Defined an opportunity for citizens to participate in an international conservation/advocacy effort.
- **Children’s Panel – Scotland/Social Welfare:** Recruited volunteers for heart-wrenching and emotionally difficult work by framing the issue in a compelling way.
- **Water Culture/New Habits – Mexico/Water Conservation:** Engaged children as arbiters of change to reduce household water usage.
- **Operation Khanyisa – South Africa/Energy Theft:** Applied a systems-based approach in its campaigning to solve the complex and dangerous issue of energy theft.
- **SPENT – USA/Poverty and Homelessness:** Created an online game to create empathy for and educate the public on the real-world issues faced by the poor and homeless.
- **Rare Conservation Pride Campaign – Peru/River Conservation:** Used the concept of pride in one’s community to stimulate behavior change and solve community problems.
- **Rail Crossing Safety – India/Final Mile Consulting:** Borrowed heavily from behavioral economics and an understanding of brain science to reduce deaths at rail crossings.
- **Umurage Urukwiye (Rwanda’s Brighter Future) – Rwanda/Population Media Center:** Utilized serial drama to present the issue of conservation from a family perspective.
- **Giving Cigarettes is Giving Harm – China/World Lung Foundation:** Mastered a systems approach that created a negative environment for smoking and incentivized quitting.
- **Love Has No Labels – USA/Ad Council:** Created a PR stunt which helped people rethink their long held ideas about race, sexual identity, and other minority cultures.

In the area of social justice campaigning, particularly with regards to LGBT rights, Evan Wolfson of Freedom to Marry and Eliza Byard of GLSEN provide insight from their deep experience in the field. Evan's suggestion to campaigners is to make sure they are following the ladder of clarity – that there is clarity and purpose in every step of campaign development from setting goals to developing a strategy, to identifying the vehicles needed, and having a clear call-to-action. He also notes the importance of the legal work, the community organizing and the opportunity to engage business in campaigns as equally important tracks to follow.

Eliza cites the importance of getting help from professional agencies, especially when trying to engage with a teen audience, which was critical for their work at GLSEN. She also explains how a public-facing campaign can be brought to policymakers in government and the best ways to reach them. She notes how GLSEN has been successful in making their work relevant to the policymakers' own agendas.

There are also effective lessons to be learned from campaigns that have fallen short. Experts mentioned a few areas where social campaigning has failed in areas like gun violence prevention, childhood vaccinations, and for programs like Scared Straight. Case studies on campaigns that have made mid-course corrections are also included from:

- The US Centers for Disease Control VERB campaign;
- A US Environmental Protection Agency program to reduce the catch of contaminated fish; and from
- A US Humane Society campaign to increase the spaying and neutering rates of household pets.

Completing the report are a series of lessons learned from the campaigns regarding behavior change as well as the sage advice from the experts interviewed for the report:

- **Planning, Planning, Planning!** Ensuring that sufficient planning and research are conducted in the formative stages of a campaign to deeply understand issues and audiences, set realistic goals and objectives, and to develop meaningful and effective programs and messages.
- **Systems Thinking:** Having a rich understanding of the complexity of the issue being addressed and recognizing that system change at the individual, government and business level may be needed for lasting change.
- **Rethinking audiences/Reframing issues:** Many of the successful campaigns highlighted worked because they took a disruptive look at who their audiences are or reframed a message so that it influenced audiences in a new way.
- **Let the stakeholders build it:** Campaigns that rely on extensive stakeholder input tend to be more authentic and believable, and they empower stakeholders to sustain such efforts.
- **Go beyond education and messages:** Resist the trap to just tell audiences what to do. Typically, only a small portion of a campaign's audience needs simple education. Most need nudges and other support to change.
- **Ensure adequate and strategic funding:** Campaigns need funding for success. One model worth considering suggests a three-part solution: a strategic planning phase, a concept prototyping and pilot testing phase, and then a full-blown implementation to be sustained and monitored over time.

At workshops in New York and Cambridge (UK) with Arcus staff, grantees and others working in the great apes conservation and LGBT social justice arenas, additional hands-on feedback was received from those working in the field. The distinction between behavior change and culture arose as a key issue between conservation and social

justice activists and further outside expert counsel was received on the topic. Those working on social justice programs also felt that issues of cultural dominance, especially relating to some of the behavior change theories, should be addressed. Timelines for change was also seen as an issue as funders often have unrealistic goals for measuring the impact of grants.

Participants also saw the need for a set of pre-planning questions that could help determine the feasibility of developing a campaign. They felt that more collaboration between organizations and funders is needed and were additionally interested in resources for planning small-scale, lower-budgeted campaigns.

*The Arcus Foundation is a leading global foundation dedicated to the idea that people can live in harmony with one another and the natural world. Arcus believes that respect for diversity among peoples and in nature is essential to a positive future for our planet and all its inhabitants. We work with experts and advocates for change to ensure that LGBT people and our fellow apes thrive in a world where social and environmental justice are a reality.*

### III. The Changing Nature of Conservation

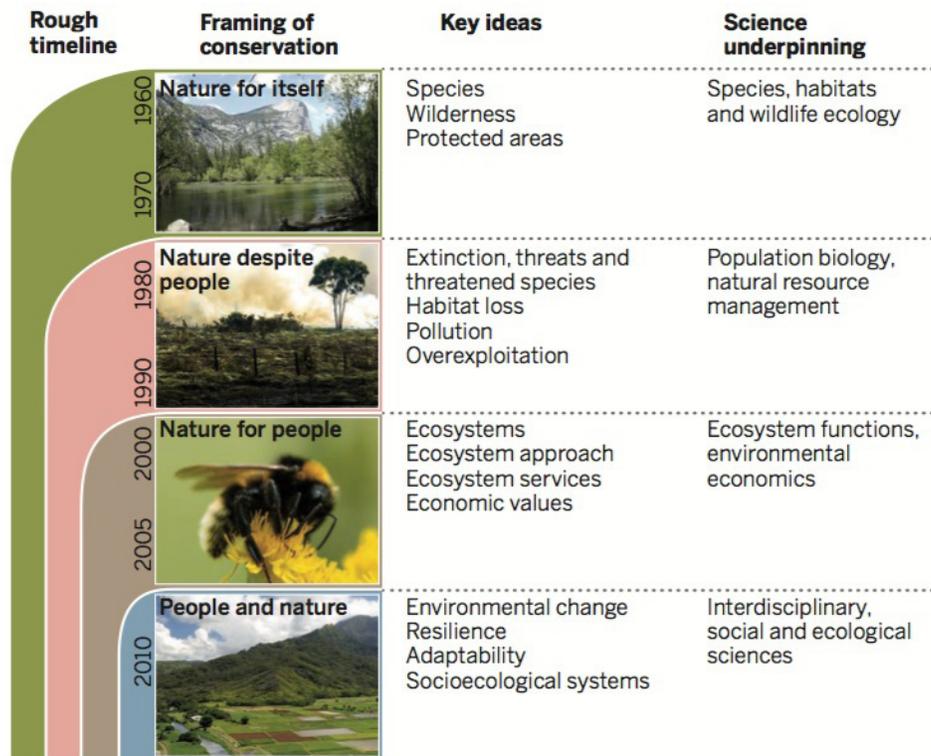
Conservation implies action, doing something or doing something differently to help conserve our planet's resources, people and animals. It means changing a behavior or activity. These might include individual or home-based behaviors like reduction of energy use, upstream activities such as legislation and enforcement of poaching laws, or businesses replacing a product ingredient like palm oil with a more sustainable alternative. When effectively researched, planned and implemented, behavior change communications (BCC) campaigns have the capacity to impact and effect change at all of these levels.

As with many other issue-based movements, the field of conservation continues to evolve, reflecting a variety of global influences including climate change, the economy, population growth and development, business trends and political strife.

For example, in the article, *Perspective: Reassessing Conservation Goals in a Changing Climate* by Camacho, Doremus, McLachlan, and Minteer from the 2010 summer edition of *Issues in Science and Technology*, the authors state: *Our dominant conservation strategy, the designation of reserves, is mismatched to a world that is increasingly dynamic. The reserve strategy rests on the assumption that nature can be protected in sanctuaries walled off from human effects. But no reserve is immune to changes in atmospheric composition, temperature, and rainfall.*

Similarly, Jeff French notes: *What I know about the development of life on earth is not about standing still and conserving anything; it's continuous change and dynamic flux. So, the notion that we want to preserve things or consider them as they are now, is in effect not a natural thing, because the world continuously changes. Environments fall or flourish, the climate, all of these things since the earth began have been changing. So, the idea of let's freeze it as it is now, is part of the problem.*

What this means for campaigners is that campaign goals and the behaviors we are looking to impact are also changing. As background, the following chart illustrates how conservation has come to be framed over the last five decades noting the key ideas portrayed and the scientific underpinnings for them.



1

#### IV. The Evolving LGBT Rights Movement

Similar to the field of conservation, the modern LGBT rights movement has grown and changed dramatically in terms of scope, issues, and framing. While a number of policy-related successes, such as marriage equality laws have been passed in a host of countries to date, the movement’s broad agenda and an extremely varied global landscape have pushed organizers and organizations to utilize a number of different tactics and strategies to achieve its goals, often concurrently. Some of the issues the movement has been and continues to address include these loosely defined categories:

- **Recognition** – The recognition that LGBT people exist, that it is not considered an illness or disease, and efforts to support the coming out process.
- **Legitimization** – Policies and laws allowing LGBT people basic human rights.
- **Protection** – Reducing bias, discrimination and violence against the community, especially among more vulnerable sub-communities such as those HIV-positive, youth, and the transgendered community.
- **Marriage** – Promoting full equal rights, including the freedom to marry a person of the same gender.
- **Organizing** – Speaking out as an LGBT (political) voice on other issues such as gun violence.

Where the field notably differs versus the conservation field, an area much discussed among Arcus staff, grantees and others, is a focus on *culture change* as opposed to *behavior change*. A recent Washington Post article describes this kind of change in the United States: *To attack these issues, queer people have focused not on transforming laws but on transforming culture. In the 1960s, gay rights groups organized “sip-ins” at bars that refused to serve “disorderly” homosexuals. Other picketers staged “zaps,” splashy, media-friendly protests that called attention to homophobic behavior. “Homophile organizations” sprung up around the country to fight for queer-only spaces. Their efforts led to the*

establishment of hundreds of pride parades, lesbian clubs and gay bathhouses — institutionalized “safe spaces” where people could meet and organize.<sup>2</sup>

Another overarching strategy successfully used by the movement in many parts of the world is the theory of contact hypothesis. The idea behind this theory is that people's attitudes towards marriage equality or other movement issues typically soften once they actually know someone in the LGBT community. TV, movies, and other mass media channels with realistic and positive portrayals of the LGBT community capitalize on this theory, as does the growing prevalence of “out” celebrities from various fields.

## V. Issues Challenging Conservation Education and Behavior Change Campaigns

Discussions with Arcus staff, grantees, partners, and experts in social marketing and communications identified a number of obstacles facing groups trying to conduct education and behavior change campaigns. Many of these obstacles are interrelated:

### Inadequate planning

Perhaps the most critical and most often cited issue identified is that campaigners are not doing the necessary, in-depth, formative research and planning to successfully launch, maintain and evaluate the work they are doing. Typical campaign planning activities such as a situational analysis of the environment and discussions with stakeholders are often glossed over. Without this work, there is little uncovered regarding the barriers to desired behavior, what motivates and drives people to positive behaviors, and where the opportunity exists for changing attitudes and behaviors.

### Outcomes and metrics not clearly defined

Without a solid grounding in the above-mentioned planning activities, it becomes extremely difficult to then identify desired outcomes and the metrics to be used to measure them. Jeff French reminds us that we need to be specific: *Not flowery language, but hard measureable things, like how many animals were born in this area over this time, or what was the reduction in the number of trees cut down at this time. Something that is measureable and quantifiable.* Metrics are necessary to set up an evaluation of campaign impact. As Nancy Lee also suggests, evaluation also benefits us by helping us see how campaign investments paid off: *Evaluation helps not only identify how many people change their behavior, but also takes a look at our return on our investment. What did it take to change the behavior, and with X-amount of behaviors, what did it cost us per behavior change?*

### Sponsors inability to effectively commission campaigns

Funders, donors and other groups commissioning campaigns often are not well prepared for the job. According to Dr. Jeff French, *one of the responsibilities of the donors is to set out very explicitly not only smart objectives about what they want to see, but a planning process to do that. It doesn't have to be a prescribed one, but some recognized logical sequential of why they're planning things that demonstrate what you've done has actually led to some kind of a result.*

### Budget constraints

While many great campaigns have been developed on a shoestring budget, most behavior change campaigns need abundant and consistent sources to fund the research, planning, ongoing outreach and evaluation needed for campaign success. Many campaigns drop off into oblivion after their initial launch, so there is a great need for ongoing funding sources.

## Inadequate audience reach

A key issue related to inadequate funding is the inability of a campaign to reach its intended audience. Campaigns are often developed without sufficient planning for media placement or outreach. No matter how great the campaign creative materials are, if there isn't adequate media support for them or innovative social media ideas behind them, the messages won't be heard.

## Not understanding the work of or collaborating with partners or previous efforts:

Campaigners often work in a bubble – not taking the time to research what similar campaigns may have done previously within the same geography or targeting the same population, which could lead to repeating mistakes of the past. In the same vein, organizations with similar missions and working with similar populations and geographies may not be coordinating their efforts or inviting other groups to collaborate, which could lead to greater impact.

## Mission creep into development

Some conservation campaigners, especially those working in developing countries are concerned that their efforts, by necessity, have become development-focused campaigns rather than conservation efforts. Whether this is technically a challenge or a reality that needs to be addressed is open for debate. It is more complicated to create behavior change messaging when also addressing economic issues.

As Paul Butler from Rare explains: *In terms of conservation particularly, we're tending to work with some of the most impoverished people in some of the most difficult conditions, where corruption is high, where incomes are low, where the middlemen have enormous sway over people, including giving them the dynamite to use to blow up fish, for example. These are not easy behaviors to change. Regression is very, very likely. People are often very risk adverse for very good reason. They don't have a lot of money and they don't have a lot of resources. They are very traditional and powerful social norms persuade them to stay with what their parents did, what their grandparents did.*

## Predictable and uninteresting messaging

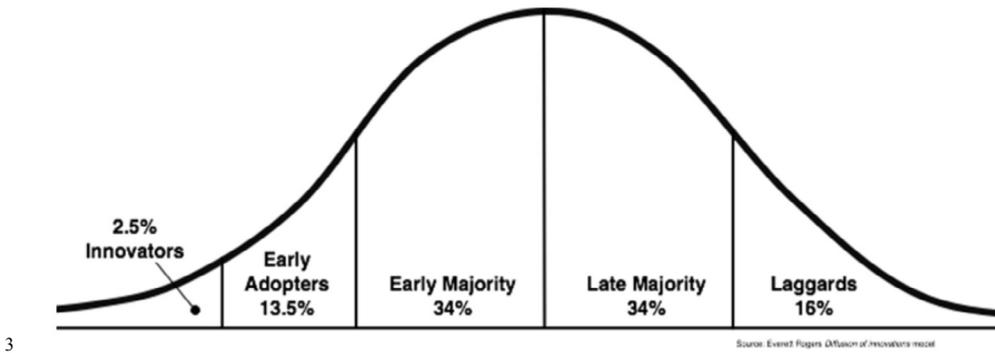
Chip Walker notes that conservation campaigns and other issue-based ads often create dull and uninspired campaigns: *NGOs all seem to talk in the same tone of voice and they get up on a soapbox and everything becomes high and mighty, so the messages all end up blending together. You get the impression that they've gone to the simplest and most straightforward thinking process...So if it's about children, they show the poor children. If it's for the environment, then they show you the polar bears. It feels like there are a lot of stock references.*

## VI. Overview of Behavior Change Communications Theories

As there is a perceived need for better planning for behavior change campaigns, we now take a look at behavior change communications theories and other planning tools that can be useful to campaigners.

### Utilizing the Diffusion of Innovation Theory in Campaign Planning

To frame this section, we first look at how social marketing expert Nancy Lee applies the Diffusion of Innovation theory to identify how to approach different audiences when looking to develop a behavior change campaign. Per the chart below, the Diffusion of Innovation theory is a way of understanding how different groups in society adopt new behaviors, including purchasing behavior (think about where you stand vis-à-vis adopting new technology). It can also be used to help plan the right interventions for a behavior change campaign based on where an audience stands in terms of a behavior:



According to Nancy: *For the innovators and the early adopters, usually it's education, just words, that gets people to change behavior. That's all you need to do. Those people are going to jump on that behavior, because they're ready to do it for some reason, or they have passion about the issue. So, just tell them what it is, what you want them to do, and they do it.*

*But then, you've got the middle market, the early majority and the late majority that takes up a huge part of the curve, and their behaviors are a huge part of the population. Most people need something more than words in order to change their behavior, and because they've got barriers that words do not knock down or inspire, or they've got benefits or an incentive they want. That's the group that social marketers are going for. That's the "help me" group, as opposed to the "show me" group, the early adopters.*

*And on the far right is the group called the laggards, who are just not going to do it. Not going to do it at all unless you make them. So, that's the "make me" group. Education helps for the "show me" group, you use social marketing for the "help me" group, and you use laws, policies and fines for the "make me" group. That's how I look at target markets.*

The key take-away here is that most conservation-related behavior change campaigns need to think about segmenting their audiences and their approaches. It is likely that the campaigns will need to incorporate some elements of education, (social) marketing, and advocacy towards policing/compliance in order to be truly effective. Or as Chip Walker notes, **People are living their own lives. They're not there waiting for us and the behavior change we want them to make.**

### Key Behavior Change Theories

To develop an effective behavior change communications campaign it is good to start with a grounding in theory. The following list of key behavior change theories should be used as a guidepost and not as a prescription for campaigners. Depending on the issue being addressed and the audience you are working with, some of these may be more relevant than others. By familiarizing yourself with these theories, you will begin to identify some questions that you will want to know about your prospective target audiences for your campaigns. As Jeff French recommends, *It doesn't much matter which model you use, or which theories, but if you try to use some and understand them, they give you different ways to think about the problem and potentially the intervention.*

## MAJOR BEHAVIOR CHANGE THEORIES

1. The **theory of reasoned action** explains behavior as a result of the person's **intention** to perform that behavior. That intention is influenced by (i) the person's own attitude towards the behavior, or (ii) the belief that people important to the person think she/ he should or should not perform the behavior. Of course, the person's own ideas are influenced by the society she or he lives in. (**Ajzen and Fishbein, 1980**. *Understanding Attitudes and Predicting Social Behavior*)
2. **Social cognitive theory** suggests that **self-efficacy**—the belief that one has the skills and abilities necessary to perform the behavior—and **motivation** are necessary for behavior change. In other words, a person has to believe she/ he can perform the behavior in various circumstances and, she/ he has an incentive (positive or negative) to do it (**Bandura, A., 1992**. *Exercise of personal agency through the self-efficacy mechanism*).
3. The **health belief model** identifies two factors that influence health protective behavior: (i) the feeling of being personally **threatened** by disease, and (ii) the belief that the **benefits** of adopting the protective health behavior will outweigh the perceived costs of it.
4. The **stages of change model** views behavior change as a **sequenced learning process** in five main stages (pre-contemplation, contemplation, preparation, action, maintenance). The model holds that to get people to change their behavior, it is necessary to determine at which stage they are and then to develop interventions that move them to the following stages (**Prochaska, J. et al., 1992**. *In search of how people change: Applications to addictive behaviors*).

Stage of Change	Description
1. Precontemplation	Target audiences do not see the proposed behavior as relevant to their needs and wants because they are unaware of the opportunity or believe it does not apply to them.
2. Contemplation	Target audiences consider or contemplate doing the behavior.
3. Preparation	Target audiences develop an intention to perform the behavior in the near future and attempt to adopt the behavior.
4. Action	Target audiences move to action because they perceive the behavior to have greater benefits, lower costs, increased social pressures, and more behavioral control than current behavior.
5. Maintenance	Target audiences maintain the behavior because they feel rewarded and are reminded about the benefits of the action.

5. The **diffusion of innovations theory** traces the process by which a new idea or practice is communicated in society, and which factors influence people's thoughts and activities in view of adopting new ideas (Ryan and Gross, 1943).
6. The **input/output persuasion model** emphasizes the hierarchy of communication effects and considers how certain aspects, e.g. message design, source and channel, as well as audience characteristics, influence behavioral outcomes of the communication (McGuire, 1969).

7. **Social influence, social comparison, and convergence theories** state that one's perception and behavior are influenced by the opinions and behavior of others, especially when a situation is uncertain (Festinger, 1954; Kincaid, 1987, 1988; Latane, 1981; Moscovici, 1976; Rogers and Kincaid, 1981; Suls, 1977).
8. **Emotional response theories** suggest that messages which provoke an emotional response have better chances to prompt behavior change than those low in emotional content (Clark, 1992; Zajonc, 1984; Zajonc, Murphy, and Inglehart, 1989).

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## The Changing Knowledge-Attitude-Behavior model

How behavior change actually happens is also being debated broadly these days as further developments in brain science and the growing field of behavioral economics are helping us rethink the classic belief that knowledge of a certain issue will lead to attitude change and ultimately to behavior change. Books like *Nudge*, *Switch* and *Thinking, Fast and Slow* are giving us new insights into our behavior. The box below highlights the seven key principles of behavioral economics. Many are similar to the behavior change theories highlighted above, but bring an added economic dimension.

### Seven Key Principles of Behavioral Economics

**Other people's behavior matters:** *people do many things by observing others and copying; people are encouraged to continue to do things when they feel other people approve of their behavior.*

**Habits are important:** *people do many things without consciously thinking about them. These habits are hard to change – even though people might want to change their behavior, it is not easy for them.*

**People are motivated to 'do the right thing':** *there are cases where money is de-motivating as it undermines people's intrinsic motivation, for example, you would quickly stop inviting friends to dinner if they insisted on paying you.*

**People's self-expectations influence how they behave:** *they want their actions to be in line with their values and their commitments.*

**People are loss-averse** *and hang on to what they consider 'theirs'.*

**People are bad at computation when making decisions:** *they put undue weight on recent events and too little on far-off ones; they cannot calculate probabilities well and worry too much about unlikely events; and they are strongly influenced by how the problem/information is presented to them.*

**People need to feel involved and effective to make a change:** *just giving people the incentives and information is not necessarily enough.*

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Nancy Lee also suggests how behavior economics can be integrated into behavior change campaigns: *It's a framework that we reference to inspire our strategies. It's telling us that we can shape infrastructures to make it more likely that people will choose our behavior. For example, you can put healthier food at the beginning of the lunch line. We can opt out versus opt in. It's a framework that tells us that people will more likely choose something in these particular situations. Like if the word "free" is there. (Behavioral economics) inspires strategy and they've shown that tools like opting out actually work.*

## VII. A Look at Some Successful Behavior Change Communications Campaigns

Having explored the issues challenging conservation campaigners, reviewed some of the leading theories behind behavior change and then identified helpful planning guides, we now take a look at a selection of campaigns.

The following are a curated presentation of behavior change campaigns from around the world. Some represent conservation efforts, others reflect health, safety and social service issues. They come from referrals from the experts interviewed for this report, from Creative For Good, an initiative of the World Economic Forum to identify successful social issue advertising campaigns, and from personal referrals of the report's author. They all provide some lesson or inspiration that may be useful to the Arcus Foundation, other conservation funders or conservation NGOs working to address behavior change. Links to campaign information and materials are provided. Where possible, excerpts from interviews with campaign representatives are included to give a provide a richer understanding of the campaign process.

### I. Project 50% -- UK/Conservation

**A community-based and stakeholder-led initiative to get local fisherman to reduce the amount of juvenile fish they discard.**

**Campaign Objective:** To protect fish stocks by reducing the amount of juvenile fish fishermen discard overboard by over 50%.

**What they did right:** This campaign used the collective intelligence of the target audience community – English trawler men – to plan the new effort, rather than having it imposed on them by outsiders. Coordinating with local net makers, they developed a new product that dramatically lowered the catch rate of juvenile fish. And the communications they used to do so were simple and in fisherman language, not environmentalist language.

**Implication for campaigners:** How can we better engage communities to find solutions for conservation issues? And where might new products be needed to help the process?

***From interview with Dr. Thomas Watchpole, Senior Fisheries Scientist, Centre for Environment, Fisheries, Aquaculture and Science (Cefas).***

**On the broader approach taken by the campaign team as opposed to typical scientific approaches that might normally be utilized:**

*The company we contracted with went out into the fishing community and started to understand what the motivations were for the fisherman, what they were trying to achieve, and what their challenges were. They wanted to know where they agreed and disagreed with the management, as well as their beliefs on enforcement policies and the science. They were interested in what influenced the management, and really trying to get to grips with why they fished the way they did and whether they wanted to change what they were doing and how they wanted to change. It was not previously how we normally would start a project. It was taking a much broader view.*

### **On the underlying political issues surrounding the campaign:**

*The stock in question was very important to the UK economically. The fishermen were going to be economically disadvantaged if it didn't improve. At the same time the industry was being tarnished by the perception that they were damaging the environment and doing it just for their own gain. They had no interest in the environment. They were doing harm. The method of fishing they used was one which is going to have an impact on the seabed. I think they were feeling under pressure, sort of unfairly represented. They wanted to demonstrate and portray themselves in the way they believed themselves to be.*

### **On enabling the skippers to lead the process:**

*The solutions themselves came primarily from the skippers. They wanted to try something slightly different. Each skipper was asked to design his optimal design for his vessel and his type of fishing and culture. It was done on that basis, working with the individuals and basing their designs on the ideas of the skippers. So they had some ownership over the design and they knew that other skippers were doing something similar... probably an element of competition in there, as well.*

### **On what he is proudest about regarding the campaign:**

*I think one of the key things was the buy-in that the industry had in it and the belief that it was their project. They are still very proud of it. They still talk about the Project 50 years.*

### **On what the campaign could have done differently:**

*Once your funding finishes for a project it's very difficult to maintain any sort of momentum so it wasn't always easy to establish what was happening and what gear the fishermen were using and why they may have changed to other designs. We weren't able to maintain feedback on why a fisherman was making decisions about changing their gear. The focus really was on the social aspect of the work perhaps to the detriment of the conventional science reporting. There was no scientific publication as a result. I always think that was unfortunate because that's information that some of the decision makers... especially management... will use.*

### **On the importance of communication with the participants in the program:**

*Once each boat completed a set of trials, those were reported quite quickly so they could get feedback and could share the experience and the results. That was a concerted effort to do that because one of the issues that we hear often is a piece of work is done and then you never hear the results or they come too late.*

### **On what campaigns need to be successful:**

*I think the feedback is absolutely critical... getting feedback from the participants in the project. Having a grounding of understanding in terms of not just the fishermen but what does it mean for them to be a fisherman, the "why" questions. It's about what does it mean to be a fisherman, how do people view you, how do you view the management situation, how do you see your own role. Much wider questions generate a broader foundation of understanding. You've got to gain an understanding of where they're coming from.*

## 2. The Truth Campaign – USA/Teen Smoking Reduction

**A boundary-pushing campaign that mobilized US teens against big tobacco companies by attracting them to an alternative brand experience which convinced them not to start smoking.**

**Campaign objective:** To reduce teen uptake of cigarette smoking.

**What they did right:** The initial Truth campaign recognized that in order to compete with the tobacco industry it needed to create a brand that was equally as cool as the existing youth-oriented tobacco brands. Capitalizing on the master settlement with the U.S. tobacco industry, the campaign provided information that inspired teens' rebelliousness and rage at the industry as a way to prevent smoking behavior. Since the campaign's inception, teen smoking rates in the U.S. have dropped dramatically.

**Implication for campaigners:** Brands have great power – how can they be utilized in the conservation arena as a way to deliver behavior change messages? And how can rage or outrage at bad players be utilized to support positive change?

**From interview with Julia Cartwright, Former SVP of Communications at the Legacy Foundation, Truth Campaign sponsor.**

**On targeting the campaign audience:**

*The thinking behind the pilot campaign in Florida, which was so successful, was that if about 90 percent of adult smokers started smoking before the age of 20, a big part of the problem would be solved if you could educate young people from about 12 all the way up to 17 and a little older to never start smoking.*

**On the strategy:**

*We knew that whatever their parents told them to do as in campaigns like “Just Say No,” were going to all fall flat. The campaign really needed to tap into that sense of rebellion, educate teens, not tell them what to do, but give them the information they need to make smart choices. And to also educate them about the way they were getting manipulated and basically played by this juggernaut – the tobacco industry – that was spending literally billions of dollars every year to get them to start smoking.*

*We had this treasure-trove of new information in the form of once secret tobacco industry documents that had been made public because of litigation... We knew that if teens could see these things, they could better understand how they were being manipulated, how they were being lied to, how the industry saw them and was marketing to them; they would be so appalled that instead of rebelling by choosing to smoke, they would rebel by choosing not to.*

**On what campaign achievements they are proudest of:**

*I am really proud of being part of a campaign that has started this huge social movement. In 2000, 23 percent of youth in the U.S. smoked, and now it's down to eight percent.*

### On how the campaign has shifted focus over 15 years:

*The feel the messaging is completely different because in the beginning we were focusing on the teens who are most likely to be risky and want to smoke to rebel. This new campaign completely flips it because now we're looking at a population where only eight percent of this demographic smoke. So instead of talking to that eight percent, we started talking to the 92 percent to bring the eight percent along.*

### Advice for conservation campaigners on reframing the issue:

*People are pretty sensitized to littering and to climate change and the effect that humans have on climate change. Maybe people don't care too much about tobacco but they care about the environment. They want to do something good for the environment. It just so happens that cigarette butts are the most littered item. They're toxic. They are only biodegradable under the most extreme circumstances. They can be deadly to fish and wildlife if consumed. They make their way into streams and waterways. They're really, really expensive for communities to clean up. That was another approach we took. I would just recommend like if you feel like you're hitting a brick wall and nobody is listening to your message, there's always a different way in. You just have to try and think about what people do care about and how you can tie into that.*

## 3. Intersexions – South Africa/AIDS Prevention and Testing

**A television series that combined the best practices of social science research and television entertainment to inspire viewers to get tested for HIV.**

**Campaign objective:** Increase viewers' perception of their risk of HIV infection, their risk reduction behaviors, as well as rates for HIV counseling and testing.

**What they did right:** Intersexions took the complicated issue of HIV prevention and turned it into an engaging 26-part television series that appealed to all segments of the South African population. Through the drama and its associated social media platforms, it began to engage with its audience and get them to reconsider their actions regarding sex and relationships, even in an era of "AIDS Fatigue." Testing of all content prior to airing ensured that messages were well-received and believable.

**Implication for campaigners:** How can drama be used as a tool for inspiring conservation? And how can we ensure that messages are not just "telling people what to do?"

**From interview with Bronwyn Pearce, Director and Interim CEO, Center for Communications Impact, which commissions the production of Intersexions**

### On the decision to use a multi-episode drama as the channel for the content:

*The whole concept really lends itself to a drama because everything we experience plays out quite well in the kind of drama where you can explore so many different related themes to the central theme of a sexual network. We wanted to show the complexity of sexual relationships and it's really difficult to do that in other*

formats. You can have a talk show, you can have many other formats, but I think when people see their own lives reflected in a drama series it kind of hits home a lot better than the short message.

#### **On why the program was successful:**

We used real local stories addressing the complexities within South Africa so that people of all walks of life and from all different cultures could identify with the series. The stories related with people. It really did cut across race, age, gender, sexual orientation...all of those social issues. I think everyone found something that they could identify with. It created an enormous dialogue within South Africa and even today. The drama series hasn't been out for some time, but via Twitter you still get a lot of interaction and mention around what each episode stood for and what the message was behind it.

#### **On use of language:**

We used a lot of vernacular, mixed with English. We subtitled it. There are a lot of languages in South Africa. If you choose one over the other you isolate a specific community, so we really mixed languages up depending on where the story was set.

#### **On how it changes behavior:**

We found a lot of people that watched the show talked about it, and as a result got tested for HIV. So for us as communicators, the first thing we know that pushes people to take action is when they are able to discuss it with their friends and family. We created a lot of dialogue around testing and knowing whether you're negative or positive and what are you going to do about that.

#### **On making mid-course corrections:**

We changed the outcome of the first series based on a lot of the feedback we got around how women were represented in the series. We did treat the ending to reflect some of those inputs because we felt if we didn't we weren't responding to what people were saying about how certain groups were represented. It was a difficult thing to do. It cost us some money.

#### **On use of research and evaluation:**

We have a national communications survey that we conducted. That's how we basically model and say what impact has it had on some of the themes that we had...HIV testing, condom use, et cetera. We do all of that before, during, and as needed, to inform a specific episode, a specific theme. We do the post-broadcast evaluation. It was thoroughly researched and evaluated; more so than a lot of other programs are.

#### **Advice for conservation campaigners:**

If I had to give one word of advice, it would be to keep your audience at the center of whatever product you're developing. It's very tempting to say "this is what we should tell our audience." We fall into that very, very easily. We know what the message is and we relate that message to our own understanding and that doesn't always get the outcome that we want. For me, it doesn't matter which field it is as long as it adheres to those principles.

### On education versus entertainment:

*We believe that if a piece communication isn't entertaining then you might as well go home. You've already lost the battle. Our argument is always that our audience is inundated with information. They have so much to choose from. How do we attract and keep their attention on what we're putting out? Remember in a country like South Africa there is something we call AIDS fatigue...there have been messages for years and years about risk of HIV.*

## 4. Seafood Watch – USA/Conservation

A consumer-led effort to inspire more sustainable seafood choices and in so doing, impacts upstream fishing industry practices.

**Campaign objective:** To help consumers make better choices about seafood in order to protect the oceans.

**What they did right:** Through education and prompts like a smartphone app or a card with state-wide information about seafood choices on it, and restaurants/seafood stores that sell sustainable products, Seafood Watch is building grassroots demand in the industry for more sustainable seafood. Seafood Watch suggests best case scenarios for seafood purchases, alternatives and specific seafood to avoid.

**Implication for campaigners:** While geared to an audience that is open to education efforts, this campaign recognizes that people have choices in the behaviors they make and gently suggests the most conservation-friendly choices. How could providing audiences with more informed choices create behavior change?

### Nancy Lee on how the program works:

*They wanted the fisheries to change their behaviors and it's hard to get to them. So, what they decided instead was to go the bottom of the pyramid and influence consumers, and then, the consumers would influence the retailers and suppliers, and then the suppliers would influence the fisheries. The program has been incredibly successful program because they basically said, what we want a consumer to do is, when they go to a restaurant or when they go to the store is buy green (sustainable) fish. If they only buy green fish, then eventually, the buyers will say, I only want the green fish because my customers are only buying the green fish. Then the fisheries will say, okay, we better raise more green fish. Then they realized, okay, how do consumers know what is a green fish? So, they created the Seafood Watch Program. They now have an app and a card that fits into your wallet which categorizes fish as green, yellow, or red. So, when you look in the fish counter you can see this is the green fish so the chances are that you will avoid the red fish.*

*It appears to be working, because we've got a lot of retailers such as Wal-Mart, Whole Foods, and many restaurants now only offering the green fish, or at least they will not offer any red.*

## 5. Adoption from Foster Care – US/Social Service

***A campaign that reframes what it means to be an adoptive parent by focusing on the needs and concerns of the potential parent and not on “those poor kids.”***

**Campaign objective:** To increase the number of parents willing to adopt a child from foster care.

**What they did right:** This campaign reframed the conversation about adoption from being all about “the poor child” to one that acknowledges and supports the fears and anxieties of prospective adoptive parents. In addition, it utilized an innovative formative research methodology that brought together current adoptive parents with prospective adoptive parents. These sessions helped the ad agency create its effective messaging platform.

**Implication for campaigners:** How can we take the focus away from “the poor environment” and identify compelling insights that will stimulate our target audiences to take action?

## 6. Diabetes Association – Sri Lanka/Health Promotion

A campaign that recognized the value of a new product to enhance behavior change efforts around sugar intake and created partnerships to promote it.

**Campaign objective:** To reduce consumption of sugar, especially among tea drinkers.

**What they did right:** Recognizing that clever marketing could help Sri Lankans reduce their sugar intake, the Diabetes Association created a fork-like spoon product and arranged for it to be available at the local Sen-Saal group of restaurants. When tea drinkers use the product, it automatically provides less sugar than the typical sugar spoon and sends a reminder to lower sugar consumption to the tea drinker. The product was actively promoted via a public relations campaign.

**Implication for campaigners:** Are there physical products that might enhance the chances for behavior change?

## 7. Lucky Iron Fish

***A campaign that had a great iron supplement product offering, but needed to improve it and make it more appealing to consumers.***

**Campaign Objective:** To increase amount of daily iron intake.

**What they did right:** Based on the insight that taking vitamins or other supplements is expensive and not something easy to do on a regular basis for many in Cambodia, researchers created a small lump of cast-iron that could provide the daily needed dosage of iron when placed in a stew pot along with that day’s meal. With low initial uptake of the product, the campaigners then fashioned the chunk into a “lucky iron fish” that has cultural

resonance and creates a sense of pride among Cambodians. Thoughtful marketing through NGO and other networks dramatically raised usage rates.

**Implication for campaigners:** Physical products to enhance or encourage behavior change are always helpful. Ensuring that these products have cultural relevance to the target audience only add to the impact.

### **From interview with Lydia Summerlee, Impact and Engagement Specialist for the Lucky Iron Fish Company.**

#### **On how the product is marketed not only in developing countries:**

*We know that iron deficiency doesn't discriminate between the developing and developed world. We understand that the fish is something that is needed across the world, and we know it is very important and very affordable nutrition for a lot of people. So, we are exploring different channels and working with different NGOs across the world to try to distribute the fish as well as selling it internationally.*

#### **On how the product was developed:**

*The project was started by PhD student, Dr. Christopher Charles. He was doing research on water filtration in Cambodia, and he realized while doing his research that a lot of women were iron deficient. So, he got to work and figured out that if women cooked with a piece of scrap metal in their pot, they would get the iron that they needed. And people were very hesitant to use a piece of scrap metal in their pots. They were using it as a paperweight or a doorstop. So, Christopher was getting kind of frustrated that they weren't using it the way that they should. So, he did a little bit of research and he learned that the symbol of luck in Cambodia was the fish. The lump of iron actually evolved into the fish, but it did go through different iterations, so it was a lotus flower and other objects before we realized that shaping it like a fish was the best way, and most culturally acceptable. So, he shaped the piece of iron like a fish and compliance rates went from 2% to 92%. People think that they are getting the luck of the fish when they're cooking with it.,*

#### **On how they use outreach in Cambodia**

*There are people on the ground that are involved in different educational programs and helping people use the fish at different trade shows in Cambodia.*

#### **On building global awareness of the project:**

*The BBC did a story on us on May 17. So, we went from selling 100 fish a month to 100 fish an hour... most recently, we have been featured in Oprah Magazine, as her top listing for her gratitude meter.*

#### **On developing their social entrepreneur model:**

*We offer two products. The first is the buy one give one, and that means that somebody purchases the fish and it's \$25 Canadian dollars online, plus shipping. They get sent the fish and then its counterpart is made in Cambodia and donated to our fish tank. We also sell our other product for people who aren't iron deficient but still want to support the cause. They can buy a school of fish, and that means that five fish are then donated to our fish tank and distributed to people who need it the most.*

### On what they are proudest of:

*I think one of the biggest things is we really demonstrate the fact that this is a very affordable and simple solution to a very complex problem. Iron deficiency doesn't discriminate between the developing and the developed world, so we know it is a global problem. Not only is it a global problem, it's a very complex problem. So naturally, the solutions to that are typically complex solutions. We're proud this is something that is so simple and based on a technology that dates back centuries.*

### And the social impact of their being a B Corporation:

*We're a B corporation, so we're all about social impact right from our production to our distribution. In Cambodia, we actually produce the fish with a company, and package the fish with a company that hires landmine victims and people who have been victims of the Khmer Rouge regime. Our operations manager there has been able to start up his own organic farm with the wage that he's being paid, which is really an impressive thing.*

### Advice for conservation campaigners:

*It's all about understanding the cultural context that you're working in and really harnessing that to create a product that is not only acceptable for people, but also that's going to change people's lives.*

## 8. Bell Bajao – India/Domestic Violence

***A campaign that reframes old narratives about domestic violence by engaging a larger audience as stakeholders and serves as an international model.***

**Campaign objective:** To engage men and boys in reducing violence against women and helping them spread the word that it will not be tolerated.

**What they did right:** The campaign reframes the issue of violence against women to include men and boys and provides them with tools to take action. The second phase of the campaign also used input from communities as to additional and specific interventions could be promoted in the campaign. The strong attitudinal and behavioral results suggest it has had impact, as well its adaptation in a number of other, and not all (similar) developing countries.

**Implication for campaigners:** In planning for a behavior change campaign, a careful review of all stakeholders can lead to the discovery of unlikely audiences and allies who can effect change. What stakeholders in an issue might be worth additional exploration and development?

## **From interview with Sonali Khan, Vice President and Country Director of Breakthrough – India, and architect of the campaign.**

### **On building support for the domestic violence law passed:**

*I met one of the champions of the law, a famous lawyer and women's rights legal advocate. She was saying we have so much in the law, but I am really very worried that there is no social response, there has to be some kind of social mobilization around the whole issue of domestic violence and how people could look it.*

### **On reframing the issue of domestic violence:**

*Until this point all of the campaigns and action around domestic violence was in the victim/perpetrator model. It was a very binary model. Man was seen as the problem. It was all about domestic violence as a huge concern for women. The research was interesting. It showed that it's perceived as a private problem. And therefore men did not want to intervene. People at large were not really stepping in and trying to stop domestic violence. In the very few cases that there was action, it was seen that actually men were taking action for the simple reason that maybe they did not initiate it and some woman told to go intervene, but the fact still remained that in a situation of violence it would seem more appropriate for men to step in.*

### **On why the campaign was successful:**

*I think the key part of this campaign was that it was positive, that it had something actionable, that people felt that they could do something about it. When I say positive, it was not trying to put the blame on anyone and also gave a solution in some way. I think those are some of the things that worked for this campaign.*

### **On the digital components of the campaign:**

*The digital campaign started moving very rapidly. It started snowballing because it brought in men and boys into the conversation. It broke down this whole traditional dialogue around how conversation around domestic violence was happening. It opened it up for new partners to participate. It opened up the issue to make it much more accessible to a wider audience. It became the pivotal point of this campaign.*

### **On grassroots efforts to support the media campaign:**

*It is important to not just do media mobilization but also to see how you can back it up with community organization on ground. The local presence of a campaign is equally important as a link to the media presence of a campaign.*

### **On the need for coordinating with social justice organizations:**

*One thing we definitely needed to do is close the loop because when you are working on the issue of violence against women I think there also has to be some response mechanism. You have to relate it with some kind of systematic change mechanism. We all know patriarchal norms are so embedded. It is very tough to transform the structures, the mechanisms, the systems that are supposed to deliver justice. Our challenge was we should have networked better with organizations that were delivering systemic or structural changes.*

### On measuring impact of the campaign:

*We had very few resources so we set up a baseline and an end line for the campaign. We had some stories as well. We had media reach of the campaign through television audience monitoring data. The baseline and end line had some interesting detail which we were able to use just to understand how people were rethinking and understanding what is domestic violence first and foremost. Then whether it was okay for women to step out and complain about domestic violence because of that whole conversation of public/private. It was very interesting to see both what men were thinking, what women were thinking, what was the stickiness around these conversations; there was a lot of push to resolve this issue within the community.*

### On what conservation campaigners can learn:

*I think many people see domestic violence as not their problem. What does it have to do with me? There is a sense of denial and sense of disassociation. How do you actually make that connection because ultimately any problem of this magnitude that impacts the lives of so many has to have some type of a social buy-in...a community buy-in. That, I think, is also good for conservation...whether you're looking at forest conservation, you're looking at sea life conservation. Ultimately much of this impacts many of us, but however much you speak about it, I don't think people make that connection. They don't make that social to individual connection. I think that is very important. Sometime they donate money...I donated once, I donated twice, but what does it mean to me? I think that's the big challenge. The sort of things I've seen working are the campaigns against firecrackers and plastic bags. Somehow if this is made to be everybody's problem, people sit up a little bit. I think with Bell Bajao what we noted is you have to make it accessible. You cannot make it a problem of a few people if you're trying to tag everybody because that also defeats the purpose of the campaign.*

## **9. Stop Shark Finning – International/Conservation Advocacy**

**A global, grassroots initiative to reduce illegal shark finning by enabling citizen activists around the world.**

**Campaign Objective:** To eliminate illegal shark finning by advocating for legislation and business action.

**What they did right:** This is a grassroots global effort to mobilize efforts aimed at governments and businesses to stop the practice of illegal shark finning for retail and restaurant sale. It allows participants to take part in a host of actions and active campaigns and share their work with others in the network.

**Implication for campaigners:** This campaign makes the case for citizen advocacy as a way to enhance behavior change communications efforts. Where can advocates support your initiatives?

## **10. Children's Panel – Scotland/Social Welfare**

***A volunteer recruitment campaign for a very difficult cause – helping abused children – that connected with its audience through humanist themes.***

**Campaign objective:** To recruit citizens to serve on volunteer panels to hear legal cases regarding child welfare.

**What they did right:** Recruiting volunteers for any effort is difficult, let alone recruiting people to hear cases about abused children. The campaign did a great job of framing the issue in ways that were relevant to potential volunteers. It also utilized the various media channels effectively and efficiently, leading to an over-delivery of volunteers, especially hard-to-reach men.

**Implication for campaigners:** What are the opportunities for meaningful service and volunteerism in the conservation world, and how can some of the messaging frames used – injustice, vulnerability, immediacy, impact and community – engage with conservation volunteers?

## **11. Water Culture/New Habits – Mexico/Water Conservation (in Spanish)**

A campaign that engages children to take responsibility for water conservation in their homes, and serve as an example for their parents and others they live with.

**Campaign objective:** To raise awareness among tweens (8-13 year olds) about the importance of and their families' ability to reduce water usage.

**What they did right:** Children have strong beliefs in what's right and wrong, and want to do the right thing. They can be very dedicated to environmental issues and also hold influence over their parents' behavior, as was seen in the early days of recycling, especially in the US. By giving children simple marching orders, this campaign effected change at an impressionable age and helped their parents as well. These efforts led to measurable change in attitudes and behaviors.

**Implication for campaigners:** How can children be a part of your advocacy efforts and what behaviors might they influence in their families.

## **12. Operation Khanyisa – South Africa/ Energy Theft**

***A systems-oriented campaign to address the illegal activity of energy theft with targeted approaches for various stakeholder audiences.***

**Campaign objective:** To reduce theft of electricity and accidents related to such theft.

**What they did right:** This well-funded campaign approached a complex problem with a systems-based approach to solving it. Research and a comprehensive strategy offered education as well as both carrots and sticks to impact behavior change. In addition, it mobilized large numbers of the population and certain industries (agri-

culture) in grassroots education and engagement programs. The campaign also utilized legal and legislative tools to help prosecute cases and create tip-off programs to alert the police about illegal usage.

**Implication for campaigners:** What can be done to persuade audiences to follow positive behaviors and dissuade them from doing others? And how can campaigns enhance broken systems for prosecuting bad players?

***From interview with Pat Govender, Managing Director of FCB Activist, the ad agency that created Operation Khanyisa.***

**On their approach to campaigns as movements:**

*As you know, politically South Africa mobilized against apartheid, so we brought that experience into our model which we then used to implement the behavior change campaign. We believe that through the building of movements, people's movements, you actually have the most chance in succeeding in terms of changing people's behaviors. What it actually means is that you need to make people see the benefits of the behavior that you actually want to achieve and they need to be part and parcel of casting the solution to address the problem.*

**On using research to challenge perceptions:**

*First we analyzed the problem and got all the data that we could find. There was a perception in the country that this was a poor people's problem and it was poor people who were actually stealing the electricity. In fact, we looked at the evidence and what we found was that approximately 62 percent of energy theft was coming from businesses and agriculture.*

**On setting up the enforcement elements of the effort:**

*We also looked at what role the law enforcement agencies play. So just as a bit of insight, to prosecute someone for electricity theft was quite difficult in our country because the laws are fairly cumbersome. We had to work with the Parliament and look at legislation because that's the first place where you want to make sure you have the right policy. We then worked with the prosecutors in terms of training them up with respect to prosecution services. We worked with the police in terms of training so they can create the right kind of evidence. And then we put into place technical auditors and investigators from engineering firms. They assisted in terms of actually showing where specifically the electricity theft was happening so we could focus on our campaign.*

**On their strategy for grassroots activist programs:**

*They could be young men or women, old grannies, church leaders, sporting personalities... anyone who was a real influence in the community. We employed them, paid them, and trained them to become local consultants on the ground. These were activists on the ground who would work for the community identifying issues, being able to clarify misconceptions, and then get us in to actually talk to the community in faceto face meetings. We could then explain the problems and the issues on safety and the economic benefits to the local communities; what's been lost if people were stealing electricity.*

**On using local languages:**

*We would have loved to actually have done a lot more in terms of using local languages and not just the three or four major languages... Xhosa, Zulu, English and Afrikaans. Of course, budget constraints are a big issue.*

### On their metrics for success:

*Number of tipoffs we actually got, decreasing the number of illegal connections, the number of people tampering with the units.*

### Advice for conservation campaigners:

*I think the key for conservation funders/campaigners is to ensure that they make very salient to local communities the direct value of being involved in conservation initiatives. More importantly, local communities must be involved in the design and implementation of these initiatives.*

## **13. SPENT – USA/Poverty and Homelessness**

**A computer game that puts you in the shoes of people dealing with poverty and homelessness to help understand the difficulty of choices and decisions the poor face every day.**

**Campaign objective:** To raise awareness of and create empathy for the problems of the poor and homeless.

**What they did right:** Rather than create messages that might fall on deaf ears, this campaign developed an online game that put players in the shoes of the poor to understand the decisions they face everyday and how any series of situations could lead to homelessness. The campaign had marginal impact as a fundraiser for the local charity it sponsored but became a worldwide teaching tool and taught valuable lessons about social welfare.

**Implication for campaigners:** Games and other non-traditional media can be effective tools for promoting conservation behaviors or helping to understand the complex and changing nature of conservation broadly.

**From interview with Jenny Nicholson, Group Creative Director and Janet Northen, Partner Director at McKinney, the ad agency that created SPENT.**

### On one inspiration for the game idea – Farmville, which would post your activities on Facebook:

*I remember going through Facebook thinking to myself what if instead of seeing those Farmville posts I saw posts from my dad that said “I can’t afford my rent and I am being evicted, can I stay at your house”...something that took that same structure of what we were used to seeing on Facebook and what we’re used to sharing with friends, and brought that hard reality of it into it.*

### And inspiration from the book, *Nickel and Dimed*:

*This upper middle-class professor tries to do three different minimum wage jobs to see if she can make ends meet and can’t do it...Imagine if that book was a game that anybody can take part in...I think if you just say it’s a game about homelessness, it’s really scary and to a point it could sound very flippant.*

### On how the game has been utilized in academia:

*I discovered from a friend who is a professor of social work that SPENT is now the primary tool that social work schools across the country use to get their incoming students in the master’s program thinking. Somebody did their dissertation at Purdue on the impact of SPENT on students. Basically it was whether SPENT had an*

*impact on their empathy for homeless people and their commitment to homelessness as a problem. This person found that actually it did impact them at a statistically significant level both right after playing SPENT and also two weeks later.*

**Some mid-course corrections included editing language and situations used in the game to make them more realistic and believable. They also put more emphasis on the donation page to the Durham Urban Ministries, which sponsored the campaign.**

*Organizations that really invest in really smart marketing and unexpected marketing...it's going to pay off in the long run.*

#### **On why the campaign was successful:**

*I think we had pretty low expectations for the initiative, which is also why it was successful. When you have a little project that no one is expecting that much from, not too many people are paying attention so you're able to take more chances than you would normally.*

#### **On the choice of language used in the game:**

*I think the biggest thing that we did with SPENT is we don't talk about homelessness and poverty the same way everybody else does. The first campaign I did for Urban Ministries actually did. It was heartstring pulling, like feel sorry for homeless people.*

#### **And advice for conservation campaigners on messaging:**

*It's the same thing as poverty...it's "what about your children," "these beautiful treasures are disappearing, if we don't do something it's going to be too late." I am not saying those aren't true, relevant, ripe messages, but we've all heard them and seen them. They probably are making us feel guilty the same way they've always made us feel guilty, but at this point you have to look for a different way to have the conversation, in a way that maybe people aren't prepared for.*

## **14. Rare Conservation Pride Campaign – Peru/River Conservation**

***A campaign using the power of pride in one's community to inspire upstream local farmers to alter their use of river resources in order to benefit downstream communities.***

**Campaign objective:** To protect water ecosystems serving both farmers and the population at large.

**What they did right:** Utilizing its proven Pride campaign model, Rare developed a grassroots, localized campaign featuring mascots, slogans and messages that created pride in the unique local environmental assets for all stakeholders. This enabled the campaign to sign a number of reciprocal agreements for watershed services (ARAs), and to provide community-based technical solutions that meet needs of upstream farmers and downstream residents.

**Implication for campaigners:** Pride in one's community is a strong stimulus for effecting lasting behavioral change solutions. How can communities be brought together and mobilized to take conservation actions?

## **From interview with Paul Butler, Senior Vice President at Rare.**

### **On the Rare model of conservation campaigns:**

*Rare's campaigns follow a formula, which is in essence a formula that is articulated in the book Switch, where we try to appeal to the rational decision-making as well as the emotional decision-making and clear the so-called proverbial path.*

*All of our campaigns are run by local people, and so we train these local people through our various partnerships. None of campaign managers are employed by Rare – they're all employees of a local institution, be it a municipal government in the Philippines, a water corporation in Colombia, a small NGO in Micronesia, or an office of a larger NGO in some cases.*

*We teach them and mentor them over a three-year period. And during that time they learn the theories behind designing and implementing a campaign and then are monitored during the early process of launching a campaign. By using local people, we hope that our efforts are more sustainable than if we parachuted in some expert from overseas who then promptly left afterwards and didn't leave behind a lot of capacity.*

*Some of our campaigns are more successful than others. But we believe firmly that building capacity is important in the kind of the countries where we work, and that is actually one of our hallmarks.*

### **On financially incentivizing behavior change:**

*We're not saving millions of hectares of the Amazon, but what's important is that these people are getting paid very small amounts of compensation in order to shift their behavior. It may be a roll of barbed wire, it may be a feedbox, it may be something fairly simple like that.*

## **15. Rail Crossing Safety – India/FinalMile Consulting**

**A campaign using brain science, as well as carefully planned nudges, verbal and visual cues to reduce the number of rail crossing deaths.**

**Campaign Objective:** To reduce pedestrian and vehicular deaths at Indian railway crossings.

**What they did right:** Direct observation, an understanding of brain science and strategic use of nudges, verbal and visual cues helped dramatically reduce train crossing deaths at a test site in India. Borrowing heavily from the field of behavioral economics, this effort demonstrates that a deep understanding of the issue at hand and how human behavior relates to that issue can unearth new and inventive ways to change behavior. Additionally, it utilizes simple technology to achieve impact.

**Implication for campaigners:** We have an opportunity to better understand our target audiences' human behavior through observation and to create prompts, nudges or other tactics to stimulate their behavior.

## From interview with Biju Dominic, CEO and Co-Founder of FinalMile Consulting

*Clients at the railway had told FinalMile that the rail crossing deaths were happening at certain stations but upon further observation and review of the data they found that in reality the majority of deaths were happening at crossings much further from the stations:*

*Once we knew the way the accidents were happening we were tried to understand why. That's where understanding behavioral economics and cognitive neuroscience came our way. These sciences allowed us to define the problem as to why people are crossing the railway tracks.*

### **Their observational research led to a number of insights:**

*We crossed the railway tracks along with the people. We acted as if we were just normal people. From our observations and from our studies we knew two or three things. One, people who are getting hit by the train are people who cross the railway tracks three to four times a day and they've been doing that for the last 15, 20, years, so they are the regulars. The people who cross the tracks for the first time are extremely cautious and they don't get hit by the train. Two, we realized that people who are getting hit are people from the ages of 15 to 35. Three, we found that it's mostly happening in broad daylight from about eight o'clock to about 11 o'clock in the morning, and about four to seven o'clock in the evening, which clearly told us that awareness or not seeing the train was not the problem.*

*That's when we realized it was overconfidence and a reduction of feeling of risk because once you do an activity again and again for a long time, the feeling of risk attached to it actually goes down. People are seeing the train. They think they can cross, but then they're far too late. There's also what we call cocktail party effect, which says that the brain can't do two things at the same time. They're escaping one train rushing across but there was another train coming on the next track, honking all the way. The brain will not be able to listen to that particular honk. We realized that it's got to do with certain deficiencies of the brain. So, we knew where the problem was.*

### **On the process for creating posters for the campaign:**

*We were wondering how to communicate a little fear or create a little fear in that particular person's mind. That's when we came across this work on motor neurons in cognitive neuroscience. And then, we said, now how do the motor neurons get activated? We knew they get activated when you see a face or at least you see a photograph. Our posters are actual photographs instead of traditional graphic signage.*

### **His counsel for conservation funders;**

*I think many conservation experts believe that it is a lack of awareness that is the cause of the current world problems. Our strong belief is that it is not, it is a behavioral problem. It is mostly a problem of hyperbolic discounting. Hyperbolic discounting in simple terms is that we are not able to see the benefits of things in the future, nor the problems that will occur to us in the future. We are far more comfortable living for the day than for living for the future. For years we have been people who live for the day. I think expecting for us to now suddenly be aware of the future or create a world better for the next generation or two generations down the line...it is not human nature.*

*We are going against conservation. Unless we handle this particular issue of hyperbolic discounting, we will not achieve good results. Everyone was creating the problem...deep inside each person knows that he is doing something which he shouldn't be doing, but he is doing it. To me, it's a behavioral problem and not an awareness problem.*

And his thoughts on how to address hyperbolic discounting:

*The church...the world's religions...have realized this.They created the concept of heaven and hell to actually make people think that your present actions have a future consequence. So the theology at a conceptual level, to me that's one of the best solutions that have been created to handle the issue of hyperbolic discounting.*

## **16. Umurage Urukwiye (“Rwanda’s Brighter Future”) – Rwanda/Population Media Center**

***A local-language radio serial drama with complex story lines that promotes conservation and reforestation in the context of health and family planning.***

**Campaign Objective:** To promote the value of reforestation and what individuals in Rwanda can do to help, as well as important and related messages on condom use and family planning.

**What they did right:** Population Media Center's use of the radio serial drama format allows them to address large, complex and interrelated issues in a way that engages, entertains, educates and ultimately changes the behaviors of its audiences.They also make sure that their programs really communicate by utilizing local languages and extensively testing and evaluating their materials.

**Implication for campaigners:** How might conservation issues be intertwined with other social issues and what value would long-format serials add to these efforts?

***From interview with Bill Ryerson, President of Population Media Center.***

**On monitoring impact of the program:**

*We had a research firm place monitors at tree seedling sale sites and they just asked people who were coming to buy tree seedlings what had motivated them to do so and 11% of them named the program by name.*

**On the value of long-format serials vs. advertising:**

*If you're trying to persuade a man in rural Ethiopia to send his daughter to school rather than marry her off at age 13, an ad is not going to work.A short term intervention is not going to work.That's where the power of identification with potential role models and then those role models evolving into positive role models for the audience can be much more influential because it's going to take time to get that man to the point from where he is now to the idea that,“Well, my daughter is a human being and she has human rights and she deserves to be educated and her kids will be better off if she's educated and she deserves to choose her own husband and I'm not going to sell her. She's going to marry because she's in love with the guy.” I mean, that's a huge leap. So, what we do is we address difficult issues that take time to move the audience.*

**On entertainment values and the influence of normative behavior:**

*Most people aren't going home at night to look for public service announcements. They're going home at night to be entertained. So, having something that captures people with suspense and other entertainment value is*

*critical. An ad campaign can do that. I've seen some very effective ad campaigns. But, just pure information isn't particularly effective. I mean, I can go watch Al Gore talk about climate change and then get in my gas guzzler and drive home. It's not easy to change behavior unless my neighbor is saying, "Oh my God. You're driving a gas guzzler. You're really out of it." And then I start to feel bad. So, I think normative kinds of influences are much more influential than informational influences.*

#### **On how use of issue experts helps their development process:**

*One of the things we do, in addition to interviews with the public, is a lot of in-depth interviews with issue experts. We actually involve those experts as advisors to every project, both to get them in the position where they can meet the demand for services, for example, that we may generate. But, in many ways more important, so they can help the writers understand the reality of any issues since the writers are not wildlife experts, they're not reproductive health experts, they're storytellers. So, they can get it wrong and these experts help them shape it right.*

### **17. Giving Cigarettes is Giving Harm – China/World Lung Foundation**

***A focused, community-specific advertising campaign combined with other legislative de-incentives to reduce smoking among current smokers.***

**Campaign Objective:** To reduce smoking rates.

**What they did right:** Recognizing that changing habitual, addictive behavior like smoking is extremely difficult, the World Lung Foundation has developed a systematic approach that includes increasing taxes on smoking, legislating limiting smoking in public places, providing quitting resources, and creating hard-hitting, negative-consequence advertising campaigns. The combination of these practices has shown dramatic declines in smoking rates in cities and countries across the world.

**Implication for campaigners:** How could a systematic plan that addresses environmental issues as well as individual behavior influence the key stakeholders necessary for behavior change in conservation efforts?

### **18. Love Has No Labels –Ad Council/Coalition of Corporate Funders**

***A blockbuster social media success story that reframed conversations about implicit bias against various minority populations in the United States.***

**Campaign Objective:** To build self-awareness of implicit bias in our day-to-day lives.

**What they did right:** Love Has No Labels took on the subtle yet divisive topic of implicit bias against a host of sexual, racial and other minority populations in the United States. The initial campaign utilized a compelling "reveal" to show that we are all one and that love has the capacity to soften even the hardest hearts. Its launch timing (Valentine's Day 2015), based on a media "stunt," helped build public will for the legalization of same-sex marriage later in the year and became a social media sensation, with over 56 million views of the video on YouTube to date.

**Implication for campaigners:** How can you tap into the psyche of your audience to develop an idea that will help people rethink their long-held beliefs? And what role can a stunt play in doing that?

**From interview with Jeff Skutnik, Senior Producer at R/GA  
(Ad agency that created campaign)**

**On the focus of the campaign and why it was successful:**

*What we wanted to do was promote acceptance and appreciation of differences, celebrate the diverse forms of love that transcend identity labels, and compel people to think about the reversal of bias through love. It was a perfect storm in many ways. The Ad Council came to us at a perfect time, culture was shifting, gay marriage was in the spotlight, and the idea wasn't overly complicated, but it was cool and relevant. A live stunt that helped do exactly what we were looking to do, which was get folks to acknowledge implicit biases. We did it through a very simple surprise and delight reveal with the skeletons, viewers pictured one thing in their head – which led to the reveal of something different. The track we overlaid on the film was Same Love by Macklemore & Ryan Lewis. It was a massive track at the time, and added to the success of the campaign. All of those things came together and created the perfect launch period for us. The campaign was picked up quite a bit, featured on morning shows and across different media outlets, a lot of people were interested in the couples featured, who they were and what their stories were. It really gained traction through media coverage and curiosity about the couples featured in the video.*

**On how the video engaged people to take action:**

*We saw a lot of people heading to lovehasnolabels.com last year and engaging with the activation material, whether it was showing the world that they support love in all forms with the Faces of Love web app, using the Love Has No Labels hashtag and sharing or by logging onto the website and taking the bias quiz.*

**On plans for this year's efforts:**

*What we're looking to do this year builds on last year, on a much larger scale. We want to continue to use love to promote inclusion and combat bias, and we're going to do that in a couple of different ways. We want to build on the momentum created by last year's campaign and further develop an uplifting and inclusive campaign while continuing to uphold LOVE as the hero. We want to avoid any finger pointing or negativity, really it's a campaign around rethinking your own bias. We've started to think through a couple of different approaches. We'll be focusing on Americans socially in the middle. We see a lot of buzz and media coverage around both coasts – New York City and LA. But we're talking to everybody. And we know they care about inclusion, but don't necessarily realize they're undermining it through their implicit bias and inaction.*

*We can talk about this all day long, but if folks are not acting on it, if folks are not learning, not talking about it with each other, or doing something about it, at the end of the day, we're failing. So, a big part of this year is to create something that folks can use that really takes the things to the next level, by implementing this idea in a way that gets people to react to the biases they didn't even know they had.*

### His advice in building a campaign:

*From my perspective patience is extremely important. A topic like this is loaded with opinions coming from every which way, one campaign is not going to break down every wall. I think patience is extremely important. And even with the success of the campaign from last year, the job isn't done. You could have a successful year, but still not yet have accomplished the overarching mission. I think this is an ongoing process where dedicated folks, who are passionate about the material, working with the right partners and teams, along with a lot of patience, can go a long way.*

## VIII. Effective practices in Social Justice Campaign Planning

Interviews with Evan Wolfson, who led Freedom to Marry's efforts for marriage equality in the United States and with Eliza Byard from GLSEN, whose Think Before You Speak campaign changed attitudes and behaviors among young people and the language they use, identified some simple precepts for effective campaign development in this sector:

### **Evan describes what he calls “the ladder of clarity.”**

#### Goals

*Campaigns need to start with the highest rung. Where are you going? What is it you're trying to achieve? It's a clarity of goal. And it's really astonishing how many movements are not even able to speak crisply and clearly, let alone inspiringly, as to what winning is. How do you define winning? And that goal needs to be clear enough, it can be big, it can be ambitious, it can be bold, certainly the Freedom to Marry was; but it has to be also clear enough, and finite enough, and concrete enough that other people can rally to it.*

#### Strategy

*Working down from clarity of goal, you need to have clarity of strategy; what will it take to win. We were ready to drive a strategy to a goal. Freedom to Marry didn't do everything itself, but it has always had its eyes fully on the strategy and was able to work on making sure that every element of that strategy was happening; whether we were doing it, or whether others were there already doing it and, therefore, we didn't have to duplicate. But we looked at the entire strategy, shepherded that strategy, identified the gaps in that strategy, and kept pushing that strategy forward.*

#### Vehicles

*And then you have to have clarity of what I call vehicles; which are actually the programs, the pieces that work, and carve out opportunities that you're going to pursue and how you are going to pursue them to deliver on your strategy.*

#### Call-to-Action

*And then clarity of action, what you're actually asking people to do. What are you asking partners to do, what are you asking allies to do, what are you asking other organizations to do? And it has to be clear. They have to understand how they can bring their piece to the work.*

*It's not rocket science. I'm not the first person to think of these ideas. But this ladder of clarity, is something we got right, that many other groups, including other parts of the LGBT movement, do not have.*

### **Evan also discusses how campaigns need to also have a legal strategy and grassroots community support, especially when working in LGBT rights:**

*Another thing you could say is another really successful part of our movement has been the legal teams, the legal work. The four pillar legal organizations, the universe of those fighting to change the law. We really moved the law significantly, although still, of course, there is more left to be done.*

*At a less-heralded level is the importance of building a community, building organizations, building infrastructure and institutions, which is a real achievement of our movement. Gay people are not born into the gay world. Gay people by and large are, unlike Jews, or unlike racial minorities, we are not born into our own. We must find our way there. We don't have the advantage of the built-in solidarity, the built-in community, the built-in infrastructure. The fact that we have built such a robust world in which one is gay, one finds other gay people, one builds teams, and organizations, and social life and so on, that's a big achievement. Especially in the face of so much oppression over so many decades.*

### **He discusses how Freedom to Marry made the business case for marriage equality:**

*We had a record number of businesses signing the amicus brief we helped organize in preparation for the Supreme Court. We ran a full page New York Times ad just with the names of businesses who were now calling on the Supreme Court to support the Freedom to Marry. That would have been unthinkable five years ago to most people. So there has been this tremendous acceleration of business support. And now our legal group and others have been mobilizing businesses to stand up against state religious exemption laws and to push for non-discrimination laws in states where we don't yet have them, like Indiana or Georgia. And they're increasingly willing to do so, in part because they see their self interest, in part because we help sharpen how to make the business case, and in part because there is growing public receptivity to it. They both want to be part of it and be seen being part of it.*

### **On the important work of the Dream Act (Development, Relief, and Education for Alien Minors):**

*The Dream Act campaigners have been trying to detoxify and reframe the immigration debate. They have been pretty successful, particularly if you think of it relatively. The rest of the immigration debate is horrible, and still so not working solution. But this piece actually made real progress, both legally and politically, but also culturally, in part because they did it very expressly and they themselves follow the Freedom to Marry playbook in many instances, to reframe the narrative, take command of the narrative, to present a different set of stories and a different understanding of who immigrants are. They did so in a way that kind of re-stroked the American people's pro-immigration views which are a part of their conflicted views on immigration broadly. They stroked the good and detoxified the bad, which is pretty much the opposite of what has happened in the rest of the immigration context over the last several years.*

*They also had an in-your-face quality, but strategically done, not just anger, but really putting stories and people forward in an assertive way. That approach is another element of the Freedom to Marry, that they consciously set out to replicate.*

Eliza provided insights on best practice in behavior change campaigning from GLSEN's perspective as well as some initial research on messaging that the organization is doing in collaboration with other international LGBT organizations working in education.

### **On campaign planning:**

*It's absolutely essential to understand who you're talking to and what they care about, and how your cause intersects with their interest. And from that space, a number of choices about language use, and vocabulary and tone; exact asks; what data you'll need to marshal to make your point; what kind of emotional resonance your approach needs to have.*

*In terms of my own experience with behavior change campaigns and targeting decision makers, was the Ad Council campaign that we did. We started working on it in 2006, and it pretty much had run its course by 2013. During that time, we really achieved what the Ad Council itself described as an unprecedented level of impact in the self-reported behavior of its target demographic. Which we then saw reflected in external outcomes in terms of our ongoing tracking of LGBT experience.*

*We had done public education campaigns, and had not had a level of sophistication in terms of messaging and matching it to the audience. When we went to the Ad Council, we were in a position to bring our knowledge of what needed to happen and the ability to track outcomes. In that relationship we got assistance really thinking about letting go of our understanding of how minds are changed, and it let us really look into how to reach 13 to 16 year olds.*

*Out of that came a campaign that pushed the envelope for us because it was humorous, it was irreverent, it was very pointed, and it worked. It required us as the issue experts to go to people who knew how to sell things and learn.*

### **On bringing the campaign to decision makers in education and government:**

*In terms of reaching decision makers, we've had a number of very successful experiences of what I call an inside-outside campaign. And what I mean by that is bringing the personal stories and emotional impact of the constituents, say to an elected official, either students or adults; and then wedding that to evidence of the need for change and what's going to make a difference, and why they (the decision makers) should take a very specific action developed through research and policy development or program testing.*

*That requires you to step back and say, "Okay, what are the primary concerns of my audience, and how am I going to demonstrate the congruence of our interests and the efficacy of what I want them to do."*

### **On reaching decision makers:**

*You might deliver the message in person, you might deliver it on a billboard strategically placed at LaGuardia Airport where they all get on the shuttle to D.C. You might deliver it as an advertisement in a newspaper that nobody reads but member of Congress. There are different channels for delivering the message, but the ingredients are both the emotional appeal and the proof points, and what emotional appeal and what proof points are predicated in understanding the self-interest of your target.*

## On how issues need to be reframed to match the interests of policy makers:

*In terms of social justice work, in conversation with some of the ILGA (International Lesbian and Gay Association) member organizations in different parts of the world, it feels like we're at a moment where having messaging beyond the human rights appeal is getting more and more important. We've always operated in an issue-specific frame. We're about transforming K-12 schools so that they serve students. We're not about securing rights for LGBT people. And for campaign purposes and in terms of campaign design, that really shapes your goal. What issue framework does this fit into? We're getting to a point of being able to take our connection to other members of the National Committee, or a coalition of concerns with a common interest that's issued based, which is a whole new level of leverage, particularly in the LGBT space.*

## And how that is playing out in new global research:

*We are developing the evidence base for advocacy and program development in several global regions. Right now we have it in the field in Latin America, in seven countries, and we are going to launch another regional hub of this kind of research within the next six months. And the point is to work with several society groups to talk with them about what does your nation care about? What do your national decision makers care about in terms of educational outcomes among young people, or health outcomes among young people? What do you need to know to tell them that will motivate them to do something to support LGBT views in the context of primary and secondary education?*

*It's message research but it's conversational message research. And then we also put a youth experience survey in the field that is tailored to get at the core issues facing LGBT youth. We have a set of questions that each mission is asking to provide regional apples and oranges, as it were. But beyond that there are some questions that reflect the advocacy needs of the local organization with respect to their decision makers in the public.*

*So as a made up example in Brazil, you might be looking more at health outcomes. And in Eastern Europe, everyone is worried about brain drain. So you need to ask a question about how likely are you to plan to stay in Moldova when you finish high school? Do you see a future for yourself in this country?*

*In the U.S. we are always assessing. We do the national school climate survey of LGBT youth experience every two years. We understand now more about the relationship of LGBT students to the STEM fields. Or to certain health outcomes that are very much on people's minds. So then you have the raw material to make your ask. But it's got to be rooted in understanding what's going to motivate your target to do something to change their behavior. As you know, that's kind of 101.*

## IX. Learning from Campaigns that have Fallen Short

Not all behavior change communications campaigns are successful, and often not from the start. In fact, many fail, and many only have minimal impact, especially considering the resources and costs to produce them. The experts interviewed for this report cited a few overall issue areas where campaigns have failed, especially in the United States. These include campaigns on issues such as:

- **Gun violence prevention, a politically charged issue and now an epidemic in the country (some have suggested that the gun lobby's efforts in this area could be utilized as a best practice in campaigning and messaging);**
- **Childhood vaccinations, where compliance rates have decreased due to misinformation in the market;**
- **The Occupy Wall Street movement, which incited anger and outrage among citizens, and criticized the current economic system but didn't provide followers with a specific action to pursue;**
- **And "Scared Straight" programs to frighten troubled teens about prison life but often achieving the opposite goal.**

As these are generally broad issue areas, it is hard to pinpoint what specific factors led to these failures. More relevant for the purposes of this report is the idea of making mid-course corrections to an existing campaign. In the latest (Fifth) edition of the Kotler and Lee, *Social Marketing: Changing Behaviors for Good*, the authors identify a few campaigns that benefitted from a rethinking mid-campaign.

### **Mid Course Corrections from Kotler and Lee, *Social Marketing: Changing Behaviors for Good***

#### ***The Strategy Wasn't Addressing Barriers for One of the Campaign's Target Audience.***

Marian Huhman, Professor at the University of Illinois, recalled a midcourse correction for one component of CDC's VERB™ campaign promoting physical activity to U.S. children aged 9-13 (tweens). After the first year of the campaign, a longitudinal survey indicated that although targets of awareness were being met for all ethnic groups, a positive association between increasing levels of VERB awareness and free-time sessions of physical activity was detected for white children, but not for Hispanic children.

Garcia 360°, an advertising agency in Texas, recommended a strategic shift. They knew from focus group findings that campaign messages were relevant to Hispanic tweens, but that they needed to reach tweens through more outlets, and recommended increasing school-based marketing efforts, including distributing a popular bilingual student planner. Garcia 360° also recommended increased promotions to parents, responding to focus group findings that also revealed that the tweens perceived family responsibilities (e.g., babysitting siblings after school while parents worked) as barriers to their participating in structured programs, especially for the girls.

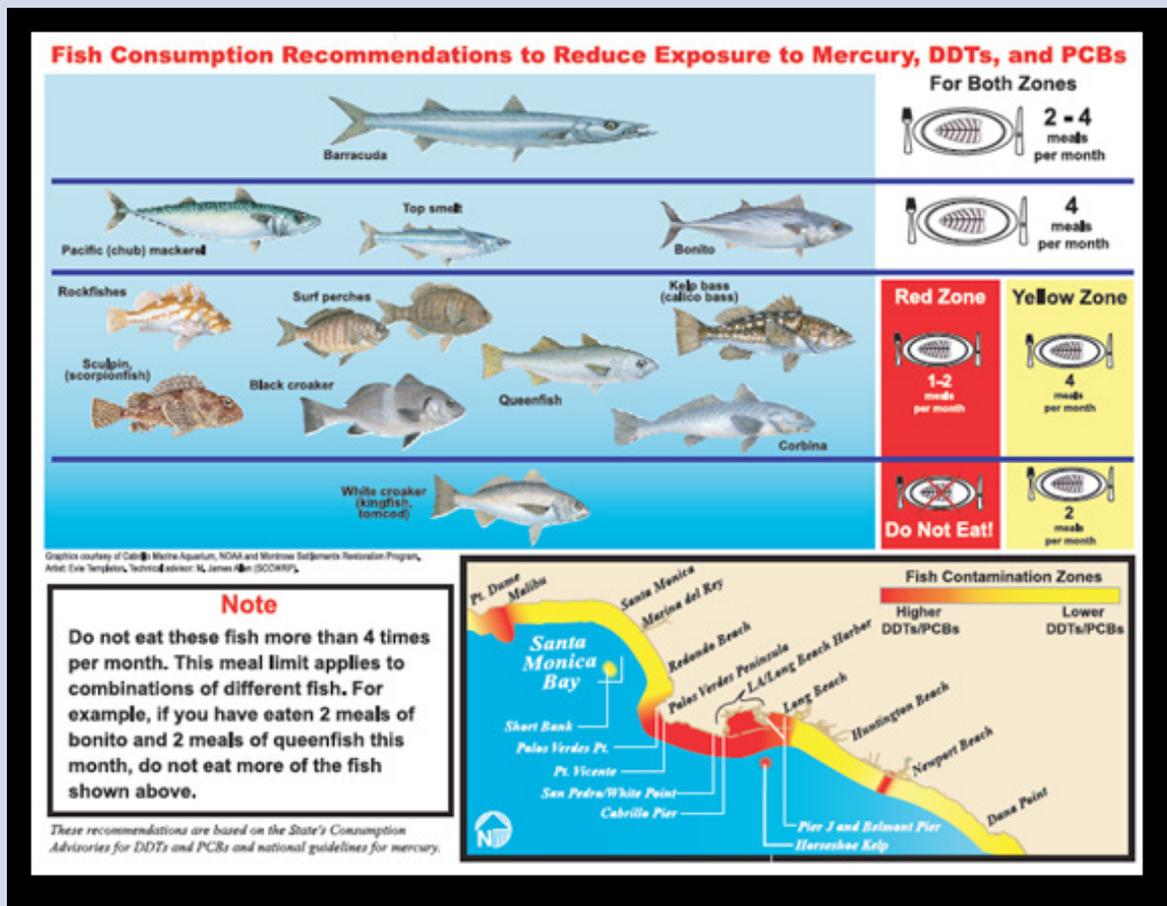
Two years later, the Hispanic tweens' outcome evaluations showed positive associations between increasing levels of reported frequency of exposure to VERB and the number of sessions of free-time physical activity<sup>6</sup>

Huhman M, Berkowitz JM., Wong FL, Prosper E, Gray M, Prince D, Yuen J. The VERB™ campaign's strategy for reaching African-American, Hispanic, Asian, and American Indian children and parents." *Am J Prev Med* 2008;34(6S):S194-S209.

They Were Asking for Too Many Behaviors.

Stephen Groner at S. Groner Associates in California shared about an EPA campaign in California launched in 2003 with a purpose to reduce the consumption of contaminated fish and a focus on informing anglers of the varying levels of health hazards associated with a variety of fish. Initial interventions primarily included distributing information through flyers, information the anglers found confusing and resulted in anglers either ignoring the health warning or not eating any fish at all (see Figure 17.2).

Figure 17.2 Initial flyer intended to influence recommended servings of fish



EPA then hired S. Groner Associates who recommended a shift in focus from an “information campaign” to a behavior change effort, one aligned to influence one specific action. “If you catch white croaker; throw it back.” At the time, the white croaker was the most contaminated fish and the third most frequently caught fish along the California coast. Formative research indicated that 53% of anglers said that not knowing white croaker was contaminated was the strongest barrier, and that one of the strongest motivators was protecting the health of their children (see Figure 17.3). Pilot testing confirmed the efficacy of the materials, and an implementation evaluation indicated that during the pre-intervention, 30% of anglers left with white croaker. During the post-intervention period, only 6% left with white croaker.

Figure 17.3 A shift to a focus on one behavior . . . releasing the croaker fish.



### Words Alone Weren't Enough.

Caryn Ginsberg at Priority Ventures Group thought The Humane Society of the United States is a great example of an organization that practices continuous improvement, regularly collecting data, noting lessons learned, and then making appropriate adjustments and enhancements. One example is their program Pets for Life (PFL), one that supports outreach to people and pets in under-served communities, conducting door-to-door outreach and holding community events offering free services such as vaccinations. An important area of focus is on influencing spaying and neutering pets. And although these community outreach activities are a very useful tool, they discovered more was needed to achieve the desired “end state” behavior of spaying and neutering pets.

Outreach teams now employ a more specific and detailed process. “The PFL approach assumes that once a client says ‘yes’ to spay/neuter, the responsibility is on the organization’s team from the local shelter or spay/neuter clinic to ensure the surgery is completed. This requires a shift in attitude and a rigid follow-up process with clients that must be adhered to at all times. Many spay/neuter programs struggle with strategy compliance, yet when the responsibility is shifted away from the client, completion rates increase significantly “

A pet owner’s ‘yes’ to spay/neuter kicks off the PFL spay/neuter process and is bound by the transfer of a voucher that resembles the shape and size of a U.S. dollar.<sup>17</sup> The organization’s information and value of the appointment package of services is listed on the voucher, a concrete representation of what the client is receiving, creating the understanding that the pet will be provided a free veterinarian appointment that includes the surgery as well as rabies and parvo/distemper vaccinations.

Referencing our social marketing model, they have added several strategies to promotional efforts: augmented products, a prompt, a commitment device, and monetary incentive tools.

The Humane Society of the United States. "2014 Pets for Life: An In-Depth Community Understanding."

6

Alice Payne Merritt from Johns Hopkins Center for Communication Programs suggests:

*Within any program we have things that we find don't work as we expected them to do, but then we just shift and adjust, because we are also monitoring. We certainly identify some lessons learned.*

Other input on why campaigns fail includes this important point from Bill Ryerson: *From my perspective the number one element is eyeballs or ears. So, you've got to have an audience. If you don't have an audience, you can have the perfect message and have zero impact. That's where we have failed. There's only a few instances where we had a fabulous program that actually affected the behavior of the three people in the audience, but we didn't do adequate promotion. So, we had a very small audience. We did a radio drama in Mexico where, out of five, one of them they gave a contract to some group to do promotion and they dropped the ball. So, in fact, not many people knew the program was on the air and they didn't listen to it.*

## **X. Lessons Learned and Effective Practices from the Campaigns**

The goal of this report is to educate and inspire campaigners and campaign sponsors to improve the quality and efficacy of campaigns already in market as well as those to be developed in the future. What follows are a short list of key lessons learned and effective practices from the campaigns highlighted in the report.

### **Planning, Planning, Planning**

Most notably, the campaigns highlighted in this report effectively utilize planning and research used to identify and understand target audiences, test messages, as well as to set objectives and metrics for evaluating campaign impact. These campaigns understand the issues they are addressing, the people they are trying to reach, and the environments in which they live. Their investment in the formative phases of campaigns lead to effective strategies and creative solutions.

Here is an interesting perspective from Chip Walker on how many campaigns miss the mark in this area: *When I think about behavior change, what I think about first and foremost is to be able to set a realistic objective. What that means is truly understanding the behavior you would like to see changed. The reason I say that is that you may think people are doing some behavior which may be very different from the true reason they're doing it. The classic example is that you go by the bodega (grocery) near your office every morning and you habitually see the same people going in and ordering the exact same thing every day. And you think, "Wow, they must be massively, loyal to this bodega." You're working for the coffee shop down the street, and you're wondering, how do we change that behavior? When the truth is they hate that bodega, they only go there because it's right by their office. They think the coffee is crap, and it would actually be very easy if you had a better offering, maybe at a better price, to get them. But you probably wouldn't*

*understand that unless you really got in and talked to those people and understood it. So I guess what you observe on the surface of behavior and the true psychological motivations about the behavior may be very different. That would be the first thing I would take a look at, and based on that, set what my behavior change objective was.*

### **Systems thinking**

Related to the idea of effective planning is systems thinking. Most conservation campaigns these days or any that include some level of behavior change require a deep understanding of all the forces at play for our target audiences and their communities. In addition to individual behavior change, there may likely be a need for advocacy efforts to influence government or business activities, enforcement of laws, or perhaps technological advances to support the behavior change. Sophisticated campaigners recognize these interconnections and utilize all tools and opportunities to move their agendas forward.

As Jeff French notes: *Another key element in social marketing, is the competition. Understanding all the forces that you're up against – are they psychological, economic, social, control, and what can you do about them? Because, without that kind of analysis and understanding, you're just doing stuff.*

### **Rethinking audiences/Reframing issues**

A number of these campaigns are successful because they took a disruptive look at their audiences and the issues they address. In some cases, they appealed to target audience influencers or interveners rather than the direct target. Or they worked to influence upstream players who wield greater power or resources.

They also upended conventional issue or message frames to bring a certain novelty and freshness to their appeals. Instead of pulling heartstrings about children in foster care to inspire guilt, they showed parents that it's not as hard as they think to be adoptive parents. Instead of telling teens how bad smoking is for them, they turned teen rage into activism. These kinds of approaches enabled real behavior change.

### **Let the stakeholders build it**

Campaigns need to be authentic and believable. With growing distrust of institutions in general, especially among the millennial generation, it has become critically important to build in a sense of engagement with stakeholders. Many of these campaigns were planned and developed with extensive stakeholder input, or at least having conducted extensive research and/or observation of them. Especially when interventions are being planned at the local level, residents or other key stakeholders are likely going to know the best ways to change behaviors and want the best outcomes in their communities.

### **Go beyond education and messages**

It's very easy to fall into the trap of believing that if we just tell our target audience what to do via a well-developed message they will actually take action. But as Nancy Lee's comments regarding the diffusion of innovation theory suggest, such efforts might only impact a very small, willing audience. Effective behavior change campaigns are using new tools and methods to diminish barriers and increase incentives to participation. These may include non-traditional communications like games, technological advances to engage the desired behavior change and/or nudges, prompts and other methods from the world of behavioral economics. Our toolbox as campaigners has grown larger and allows for greater flexibility.

## Ensure adequate and strategic funding

Lastly, behavior change takes financial resources. Funders need to support campaigners' programs with adequate budgets to do the needed planning and explore creative campaigning options for achieving behavior change. This doesn't necessarily mean larger and bigger budgets.

Jeff French recommends a three-part funding model with successive phases green-lighted only if there is significant confidence to move forward after each part is developed: ***My recommendation is to budget in three phases. The first budget they give out after commissioning the work is the scope of understanding the problem and to come up with a plausible intervention, not doing anything, but just to understand and come up with some plans, data and research. The next budget would be to do a project concept, prototyping, pilot testing, test the thing to see whether it's might actually work or not, then refine if necessary. The third budget, the big budget, is for implementation sustained over time, however long the plans call for.***

## XI. Additional Learning and Discussion at Arcus Foundation workshops

Following the completion of this report, The Arcus Foundation organized two day-long workshop sessions at the Foundation's New York and Cambridge (UK) offices in the spring of 2016. These sessions were attended by Arcus staff, grantees, and invited representatives from other organizations working in the Great Apes Conservation and LGBT Social Justice fields. The purpose of these sessions was to share knowledge and to understand how behavior change communications programs could be better planned and utilized in these sectors. Some of the key learnings and discussion included:

### Culture change versus behavior change

During the New York workshop many of the social justice attendees felt that the session did not speak their language as they focus on culture change versus individual behavior change. This tends to be true in regard to the Foundation's grantmaking focus as well. Some working in the social justice arena also gave examples of incongruities in behavior change, i.e., voters who "held their nose" while voting for LGBT issues but who may not have changed their mind on the issue.

After the New York program and before the Cambridge session, we explored the behavior/culture issue more deeply and received input from social marketers on the interplay between culture change and behavior change:

*Behavior change programs function as a subset of cultural change programs. Behavior is a manifestation of cultural influences – to change behavior may need to influence cultural norms, beliefs, attitudes. At the same time, behavior influences attitudes and beliefs so the two are interrelated. One needs clarity of what you are trying to influence and how to measure it. – Jeff French*

*Culture change, as a shift in mindset or societal/zeitgeist orientation, can lead to behavior change. Behavior change is not reliant on culture change – incentives, fear, circumstances, etc., may change our behaviors as well. – Chip Walker*

*Culture change happens from the social interactions before, during and after the individual behavior change. If you only think about individual behavior change, you may or may not affect social norms. If you work on changing social norms (i.e., culture change) you will be more likely to bring about individual behavior change. – Nedra Weinreich*

These ideas led to a more productive and engaged conversation in Cambridge. Ultimately, an understanding of the interplay between culture change and behavior change should be considered when planning new programs, activities or campaigns. This work should well be part of a situational analysis prior to development of any interventions.

### **Cultural dominance**

There were some lengthy discussions on this topic at the New York session as many of the behavior change theories and planning tools presented were felt, especially by the social justice attendees, to have been created by a (white male) dominating culture. Sensitivity to whose theories and ideas we utilize in planning should be considered by social campaigners. One best practice from the report that may be helpful in this area is ensuring community members' involvement during the planning, implementation and evaluation of any campaign.

### **Measurement**

Attendees expressed a keen interest in having better understanding of and tools to measure behavior change campaigns. Covered briefly in the Cambridge workshop, more tools and training on this topic should be explored by funders and practitioners.

### **Timelines/Funding Cycles**

The issue of how long campaigns take to have effect and what sort of timelines should be developed surfaced at both meetings. Many were frustrated with the relatively short funder timeframes within which campaigners were expected to have realistic results. This was especially true for those working in areas defined as culture change, where results might take years or decades. Some guidance on realistic timelines for projects and programs is welcome.

### **Collaboration**

Given limited budgets and big goals to achieve, many felt there was room for greater collaboration among non-profits and with foundations on behavior change campaigns. Assessing organizational strengths and capacities for campaigning may be an area that should be part of the planning process, just as one might conduct a rigorous situational analysis.

### **Small scale campaigns**

A number of non-Arcus participants were very interested in resources and planning for small-scale, smaller budgeted campaigns. While the report and discussions did highlight some smaller budgeted campaigns, there is interest in the field for developing more grassroots campaign planning tools.

### **Need for pre-planning questions**

A conversation developed in Cambridge that suggested the need for a series of planning questions that could be of use to both funders and campaigners. These questions would take a high-level look at organizational capacity for campaign development, overall goals and planned target audience(s), as well as an analysis of the situation. These questions could serve as a pre-assessment to see how and if a campaign would be viable before making any commitments or spending funds.

### **No experience with existing guides**

Only one of the participants had any experience using the campaign planning guides featured in the report appendix or other guides. This was partially due to the fact that the number of active campaigners in the trainings was rather low. However, it suggests that creating a more user-friendly and/or issue specific (conservation/social justice) guide could be helpful.

### **The three (four) part model is intriguing**

Overall there was interest among attendees of moving towards the three-part planning model for campaign development, as described in the report. This would consist of a rigorous situational analysis, a pilot creative phase and then a full-fledged campaign effort in a larger geography or against a broader demographic. The fourth part, monitoring and evaluation, was suggested to supplement the second and third phases and to provide data and metrics that could be applied to support the continued development of the campaign.

# APPENDIX

## Utilizing Social Marketing/Behavior Change Guides

## Utilizing Social Marketing/Behavior Change Guides

In addition to a variety of theoretical frameworks, experts have developed guides and planning tools for campaign development. A number of these tools come from the world of public health where the idea of social marketing or behavior change marketing was first developed. The following is a short overview of some of these tools and how they may be useful to conservation campaigners.

### [European Centre for Disease Control and Prevention: Social Marketing Guide for Public Health Managers and Practitioners \(free\)](#)

Although targeted to the public health field, this guide, written by UK social marketing experts Jeff French and Franklin Apfel, provides a comprehensive background on social marketing to anyone with an interest in the topic. The first section gives an overview of the field and theories behind social marketing, the second section helps in planning a campaign and the last section provides checklists and toolkits that can be used in implementing a campaign.

### [Kotler and Lee: Social Marketing: Changing Behaviors for Good, Fifth Edition \(purchase\)](#)

From the other side of the pond, American marketing professor Philip Kotler and social marketing expert Nancy Lee have released the fifth edition of their popular textbook. The book gives a comprehensive overview of social marketing, provides campaign planning tools and behavior change examples from a variety of fields.

### [Johns Hopkins University \(US\) Center for Communication Programs: The P Process \(free\)](#)

More of a planning tool for practitioners, this five-step guide is also targeted to the health field, but easily serves the needs of conservation campaigners as well. It is designed to be helpful whether you have a large budget or no virtually no budget at all and includes a French-language translation.

### [US Centers for Disease Control: Cynergy Lite: Social Marketing Made Simple \(free\)](#)

A comprehensive but easy-to-follow planning guide for developing a social marketing campaign complete with examples and templates that can be individually adapted. While there is a focus on health-related campaigns, it does not detract from its usefulness for conservation campaigners.

### [Susan Michie, et al., The Behavior Change Wheel \(purchase\)](#)

This book is a more advanced guide to designing and evaluating social marketing campaigns based on the Behavior Change Wheel, which synthesizes 19 varied behavior change frameworks. It focuses on the premise that Capability+Opportunity+Motivation=Behavior Change.

## Other Communications Planning Tools

### [Spitfire Strategies – Communications Planning Tools \(free\)](#)

A series of online communications planning tools from nonprofit communications experts Spitfire Strategies ranging from full communications plans to crisis communications, digital strategies and community engagement strategies.

### [Fenton Communications “See, Say, Feel, Do” Guide to Social Media Metrics \(free\)](#)

For campaigns that include a social media component, this guide offers guidance on how to measure impact and to develop metrics that meet the objectives of your initiative.

## Books

### [Nudge: Improving Decisions About Health, Wealth, and Happiness \(purchase\)](#)

Thaler and Sunstein’s provocative book on how we think and make critical decisions in our lives and how we can improve those processes for others utilizes examples from a variety of fields and sectors.

### [Switch: How to Change Things When Change is Hard \(purchase\)](#)

Chip and Dan Heath’s book on how our emotional and rational minds work help demonstrate how difficult behavior change is and how we can effect change in others. A number of stories are used to explain the theories and ideas promoted in the text.

### [Social Marketing and Social Change: Strategies and Tools For Improving Health, Well-Being, and the Environment \(purchase\)](#)

Social marketing expert Craig Lefebvre’s text on addressing “wicked” social problems includes both theory and case studies of campaigns that have successfully used social marketing to address major societal issues. It is also a comprehensive guide for campaign planning and measuring impact.

## Organizations and Blogs

### [The Advertising Council](#)

The largest producer of public service communications campaigns in the United States, the Ad Council and its blog [AdLibbing](#), provide valuable lessons on campaigning for a variety of issue areas including health, safety, the environment and community issues.

### [Osocio](#)

A global blog on new campaigns about social causes from NGO’s around the world, Osocio also includes links to a numerous other blogs and sites addressing social issue campaigns.

### [Fenton Communications](#)

Fenton is a full-service, US-based, social change communications agency that works with progressive organizations worldwide. Their [blog](#) includes numerous links on a variety of media and communications issues.

### [Spitfire Strategies](#)

Another US-based communications agency that specializes in nonprofit and foundation communications. In addition to the free planning tools it provides (see above), their [blog](#) contains useful information for campaigners.

## (Endnotes)

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- 5 Dawney and Shah, *Behavioural Economics: Seven Principles for Policy-Makers*, New Economics Foundation, London, 2005.
- 6 Lee, N. R.; Kotler, P. Social Marketing: Changing Behaviors for Good, 5th Edition pp. 498-500. Copyright © 2016 by SAGE Publications, Inc. Reprinted by permission of SAGE Publications, Inc.

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