Theory and Case Studies for Community Based Social Marketing

SUSAN MAZUR-STOMMEN, JENNIFER TABANICO, MARILYN CORNELIUS
Community Based Social Marketing: An Overview
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INDICIA CONSULTING
Behavior as Technology

• The common thread that binds this track is that behavior is the hack
  • Behavior and technology always work hand in hand
  • Behavior change techniques are often delivered through technology
    • In-home devices
    • Smart phones
    • Thermostats
• We have developed technologies that can get out and interact with people on the go, in real-time
  • GOTV type program to get instant demographic local data to get a mesh of big data and community organizing
• Emerging tech enters the conversation here at the intersection of behavior and technology
Our goals for this session

• Today we have brought together some experts and practitioners in the world of Community Based Social Marketing (CBSM) for utilities and energy customers

• We will be discussing the field...
  • Where it is going
  • What challenges exist
  • How it fits with emerging technologies

• Jennifer will discuss CBSM and the process of behavior selection

• Kat will focus on implementing and challenges

• We will then have a discussion and some Q&A
• At its heart, CBSM is an alternative model about behavior change (e.g. Not Opower!)
  • The attitude-behavior model suggests that simply informing individuals will suffice for them to change a behavior.
  • The economic self-interest model assumes individuals will change behavior to maximize financial benefit.
  • Community-based social marketing precedes from the idea that both of these may be necessary, but insufficient to change complex and deeply rooted habits.
CBSM is...

1. More targeted, leaner, and more impactful
2. A way to overcome barriers and consider overlooked human behavior aspects
3. Appealing to our social selves, not just our economic selves:
4. Behavior change happens within a social context, which provides additional motivation and support (think Weight Watchers)
5. The thoughtful application of social marketing tools to specific, local, barriers
What CBSM is not

There is confusion in the brand: many people think it is social marketing, or outreach, some people think of it as just behavior change...

- Community-based social marketing is not a synonym for social media
- CBSM is not traditional marketing oriented around the four P’s: Product, Price, Placement, and Promotion
- CBSM is not ‘out-reach’ in a tent at a fair
- CBSM is not an ‘educational’ effort
- Educational materials may be developed for the effort, but simple distribution is not CBSM
Applying CBSM

- A set of steps that any CBSM program must incorporate (from Mackenzie-Mohr):
  - Selecting behaviors that will achieve program outcomes
  - Identifying barriers and benefits, using local research when possible
  - Developing strategies, addressing barriers
  - Piloting the strategies, ensuring effectiveness of strategies
  - Broad-scale implementation and evaluation,
  - Using direct and observational measurement
CBSM works

A properly designed CBSM program is not easy or cheap—However, CBSM can be cost-effective due to:

• Higher participation rates
• Greater adoption of energy efficient products
• Deeper, longer lasting changes in energy-related behaviors.
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Community-Based Social Marketing

Emerging Technologies Summit
April 21, 2017

Presented by: Jennifer J. Tabanico, President
Behavior Matters

- Sustainability = Behavior
- Technology Solutions
- Policy Solutions
- Behavioral Solutions
THE Behavior Matters

- Diverse Behaviors
- Diverse Barriers
Information-Intensive Campaigns

Knowledge

Awareness

Economic

If people know what to do, they will do it.

Knowledge ≠ Behavior Change

If people know the severity of it, they will change.

Awareness ≠ Behavior Change

If it is in their financial best interest, they will do it.

Economic ≠ Behavior Change

Enlightenment ≠ Behavior Change
Information-Intensive Campaigns

Knowledge

If people know what to do, they will do it.

Knowledge ≠ Behavior Change

Awareness

Economic

If it is in their financial best interest, they will do it.
Information-Intensive Campaigns

- **Knowledge**
  - If people know what to do, they will do it.
  - Knowledge ≠ Behavior Change

- **Awareness**
  - If people know the severity of it, they will change.
  - Attitude ≠ Behavior Change

- **Economic**
Information-Intensive Campaigns

Knowledge

If people know what to do, they will do it.

Knowledge ≠ Behavior Change

Awareness

If people know the severity of it, they will change.

Attitude ≠ Behavior Change

Economic

If it is in their financial best interest, they will do it.

Self-Interest ≠ Behavior Change

If people know what to do, they will do it.
Community-Based Social Marketing

- Origins in Social Science
- Community-based
- Removes Barriers
- Outcome-based
Community-Based Social Marketing

Select Behaviors

Barriers & Benefits

Develop Strategy

Pilot Test

Community-Based Social Marketing

Select Behaviors

Barriers & Benefits

Develop Strategy

Pilot Test


See also www.cbsm.com
Community-Based Social Marketing

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Select Behaviors

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Develop Strategies

Pilot Test

Implement Broadly & Evaluate


See also  www.cbsm.com
Step 1: Selecting Behaviors

- Strategic Selections
- Informed Choices
  - Confirmation bias
  - Technical and survey data
Identify Sectors

Electricity Use by Sector

- Commercial: 52%
- Residential: 32%
- Military: 11%
- Water/Wastewater: 4%
- Street Lighting: 1%
Identify Sectors

Commercial Sector Electricity Use by Segment

- Misc: 19%
- Retail: 19%
- Office: 14%
- Educ: 10%
- Hospital: 7%
- Hotel: 7%
- Resort: 7%
- Grocery: 6%
- Restaurant: 5%
- Warehouse: 3%
- Large MF: 3%
Identify Sectors

Office End Use Estimates

- Lighting 34%
- Cooling 30%
- Office Equipment 13%
- Ventilation 9%
- Misc 5%
- Refrigeration 5%
- Food Prep 1%
- Water Heating 3%
Create a List of Behaviors

End State
- Action Causes the Outcome
  - Turn off computer monitor at end of day

Non-divisible
- Cannot be Broken Down into Smaller Actions
  - Conserve energy

Avoid Strategies
- Not Directly Linked to Outcome
  - Sign a pledge; Attend a workshop
<table>
<thead>
<tr>
<th>Behavior (end state, non-divisible)</th>
<th>A Impact (0-10)</th>
<th>B Probability (0-10)</th>
<th>Penetration (0.00 – 1.00)</th>
<th>C Reach 1-Penetration</th>
<th>D Applicability (0.00 – 1.00)</th>
<th>Weight A<em>B</em>C*D</th>
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## Prioritize Behaviors

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<th>• How significant is the behavior?</th>
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<td>Probability</td>
<td>• How likely is adoption?</td>
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<td>Penetration</td>
<td>• How many already engaged?</td>
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<td>Applicability</td>
<td>• For whom is it relevant?</td>
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Step 2: Identify Barriers and Benefits

- **Starting Point**
  - Literature Reviews
  - Observations
  - Focus Groups

- **Quantitative**
  - Surveys

NOT Based on Hunches!
Step 3: Develop Strategy

- Tools from Social Sciences
  - Remove Barriers
  - Enhance Motivation

Behavior Change

Personal Contact
Step 3: Develop Strategy

- Tools from Social Sciences
- Remove Barriers
- Enhance Motivation
- Personal Contact

Behavior Change
Step 3: Develop Strategy

- Remove Barriers
- Enhance Motivation
- Personal Contact

Tools from Social Sciences

Behavior Change
Step 3: Develop Strategy

Remove Barriers
Enhance Motivation
Tools from Social Sciences
Personal Contact

Behavior Change
Social Science Tools

- Incentives
- Contests
- Social Modeling
- Social Norms
- Convenience
- Commitments
- Education
- Feedback
- Prompts
Step 4: Pilot Testing

Select Behaviors

Barriers & Benefits

Develop Strategies

Pilot Test

Implement Broadly & Evaluate
Jennifer Tabanico

email: tabanico@actionresearch-inc.com
Leveraging CBSM for Utilities

Emerging Technologies Conference April 2017

Kat A. Donnelly, Ph.D., P.E., CEO
Marilyn Cornelius, Ph.D., Behavioral Scientist
30% of a commercial building’s energy use is wasted energy.

Continuum of Behavioral Actions & Technologies

Technologies: gadgets, widgets, and materials

Behaviors: practices, policies, and decisions

Source: Adapted from Karen Erhardt-Martinez
Commercial Building Electricity Use

Engagement Campaigns

“What if we don’t change at all ... and something magical just happens?”
Engagement & Wellness Programs Are ...

- Games, campaigns, and messaging that motivate employees
- Fun and thought-provoking initiatives that activate company core values
- Collective actions that build team cohesion
Employee Engagement Campaigns

- Turn-key engagement solutions
- Toolkit with step-by-step instructions
- Baked-in behavioral science
- Measured baselines and results
- Optional support from campaign facilitator
County Spotlight:
Mecklenburg County, North Carolina
“Crab, You’re It” CBSM Campaign

Goals:
• Promote energy efficient behavior

Outcomes:
• Addressed engagement barriers
• Created new social norms
• Activated 350 employees (in the County office)
Results

• Lasting impact
  • 26% less unnecessary lights

• Scaled up and adopted by
  • Envision Charlotte
  • Charlotte Air Awareness Program - 250 businesses
  • Greenville County - 2,000 employee participants
Envision Charlotte

Energy Savings Goal:
• 5% behavior change
• 15% operational savings

Qualifying Buildings
• Office building > 10,000 sq. ft
• Represents 21.5 million sq. ft. of office space and 75,000 employees
Envision Charlotte

• Grassroots
  • “Energy champions” programs
  • Marketing & Grassroots Outreach
  • Town halls

• Participation
  • 98% of eligible sq. ft.
  • Digital infrastructure

64 of 66 qualifying building participate
Grassroots Program Design

• Engagement across stakeholders:
  • Building owners
  • Facility managers
  • C-Suite
  • Workers

• Over 1,500 energy champions trained

• Two waste-reducing actions
  • Flipping Out (Lights)
  • Powering Down (Office Equipment)
Results

• Goal: 5% behavior change
• Result 2013: 6.2% energy reduction

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<th>Size Category</th>
<th>SEN Net Savings</th>
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<tr>
<td>Overall</td>
<td>6.2%</td>
</tr>
<tr>
<td>&gt;= 100,000 SF</td>
<td>6.4%</td>
</tr>
<tr>
<td>&lt; 100,000 SF</td>
<td>1.1%</td>
</tr>
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• Result 2015: 17.2% energy reduction

Lessons Learned and Engagement Best Practices
### Barriers vs. Benefits

<table>
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<th>Benefits</th>
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<tr>
<td>Continuous design process</td>
<td>Test/Learn/Adapt: Learn what works/what doesn’t work</td>
</tr>
<tr>
<td>Long implementation times</td>
<td>Focus on a few strategies that worked well in other markets</td>
</tr>
<tr>
<td>Buy-in across utility</td>
<td>Unifying methodology: seek leadership support across org</td>
</tr>
<tr>
<td>Complex set of offerings</td>
<td>Organize customer journeys, engagement, &amp; follow up opportunities</td>
</tr>
<tr>
<td>Direct customer involvement</td>
<td>Customers become ambassadors</td>
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Engagement Best Practices

1. Discover the right partners
2. Mobilize your champions
3. Release ownership
4. Facilitate responsibility
5. Support contractors
Further Questions?

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