Planning for Effective Social Marketing Campaigns

A Step-by-Step Guide and Workbook

SHOW ME   **HELP ME**   **MAKE ME**

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Cover illustration adapted from Everett Rogers, Jay Kassirer, Mike Rothchild, Dave Ward, Kristen Cooley

Step #1: What is Success?
## Identifying purpose, goals, and objectives

This is the most important step in the planning process. Everything you do in steps 2-10 should point you towards your purpose, goals and objectives.

Planning Tips:

- Your purpose is why you are doing what you are doing
- Goals are what you are trying to achieve (long-term and broad)—what does success look like 2-5-10 years from now?
- Your purpose and goals should be determined before the planning process begins
- Objectives are the measurable means to reach each goal
- Objectives should focus on the desired behavior changes
- Objectives should be as specific as possible (by who? How much? By when?).

Pitfall: Objectives are not measurable.

It is important to ensure that you set measurable objectives up front. And you need to figure out how you are going to measure against those objectives. What data do you need? How will you collect it? If your objective is not measurable, you need to redefine it and find one that is.

OBJECTIVES

NOT MEASURABLE
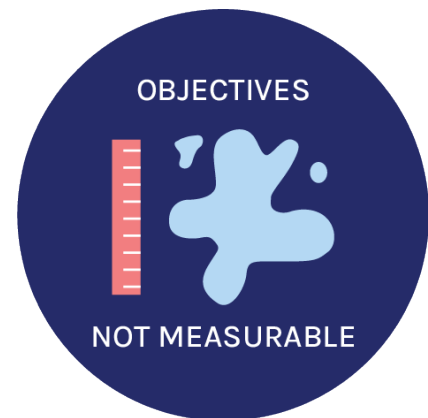
> **"If you don't know where you are going, any road will get you there."**
>
> - Alice in Wonderland (paraphrased)

Example: HIV Prevention

Seattle King County Public Health wanted to use social marketing to encourage men who have sex with men (MSM) who are at high-risk for contracting HIV to test more frequently and use PrEP.

Goal #1: Increase HIV testing among high-risk people

- Objective #1: Increase the number of high-risk people testing for HIV
- Objective #2: Increase the number of high risk people using PrEP

Step #1 Worksheet

GOAL #1	OBJECTIVE #1	OBJECTIVE #2	OBJECTIVE #3

Step #2: Stop, Look, and Listen

Defining research needs

Effective social marketing campaigns and materials are grounded in research. Research should be used to understand priority audiences' current actions and identify what they think and feel about the subject matter and behaviors. It can also be used to help evaluate a program's effectiveness.

Planning Tips:

- Research is a necessary part of the planning process

- Avoid the urge to assume that you know the answers already or that your priority audiences think like you do

- Find, use and mine existing research sources—there is no need to re-do what others have done before you

- Research does not need to be expensive, but it does need to be conducted with members of your priority audience

- Use a variety of research tools:

  - **Quantitative:** Used for creating a statistically relevant profile of your audience through online, mail, or phone surveys. Ideal for identifying and compiling audience data on demographics (who they are—age, income etc.), current behaviors (how they act) and attitudinal factors (how they think/feel). This type of research can also be used to track campaign objectives.

  - **Qualitative:** Research to delve deeper into an audience's beliefs/values or to test messages and concepts. Usually done with a small number of priority audience members through means such as focus groups, interviews and intercept interviews.

  - **Observational:** One of the best types of research in helping plan and evaluate a social marketing campaign can be to use observational research tools. Observing the behaviors of your priority audience group can provide insights that you might not receive through research that relies on people self-reporting their behaviors. It can also provide accurate pre and post data for evaluating behavior change from your efforts. An example of using observational research to help plan a campaign would be observing how people use the recycling and composting stations at a restaurant. An example of using observational research for evaluation would be observing how many loads are secured in trucks coming to a transfer station before and after a campaign.

Pitfall: Failing to trust the research.

There is a strong bias to believe that our own assumptions are an accurate reflection of how others feel. This can lead people to insert bias into the interpretation of research results. It is critical that you trust the research and don't let your opinions or the opinions of others (that are not part of the priority audience group) influence decisions in a way that is counter to what you learned in the research.

Example: Unsecured Loads Campaign

The Washington State Department of Ecology created a social marketing campaign to improve road safety by getting more people to properly secure their loads. Both quantitative and qualitative research were used in the development of this campaign and observational research was used to evaluate the pilot program.

What information do we need?

- Who is driving with unsecured loads (priority audience identification)?
- What are the circumstances that cause people to drive with an unsecured load?
- What will motivate our priority audience to always secure their loads?
- Program evaluation to track changes in the desired behavior (are more truck drivers securing their loads?)

How can we get it?

- Quantitative survey of people that drive pick-up trucks
- Online focus groups of pick-up truck drivers that do not always secure their loads
- Pre and post campaign observational research of the number of loads that are secured at transfer stations

Step #2 Worksheet

WHAT INFORMATION DO WE NEED?

HOW CAN WE GET IT?

Step #3: The What
Identify the desired behavior change

In this step you want to determine the specific desired behavior changes that are the most direct path to achieving the program's goals.

Planning Tips:

- Choose the desired behavior changes
- Evaluate the potential impact of each behavior change
    - Impact: Will the desired behavior change have a large impact on achieving your goals?
    - Probability: Are people likely to change?
    - Behaviors with high potential impact and high probability of change are good targets
- Is the behavior end-state?
    - Does it provide the desired outcome?
- Is the behavior non-divisible?
    - The behavior cannot be divided into smaller chunks
- Sometimes there are several steps that your audience needs to take before the end-state desired behavior change. Each step could have its own barriers and motivators. If this is the case for your behavior, it can be useful to map the steps in a behavior chain and then identify where you need to start with your audience.

Use this chart to map your potential behavior changes. You are most likely to be successful with your social marketing campaign if you pick behaviors that fall into the top right quadrant.

High

Impact

Low

Behaviors with good potential in this quadrant

Low   **Probability of change**   High
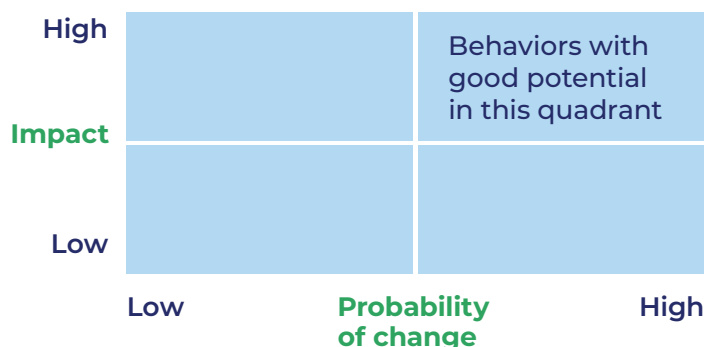
Pitfall: Choosing too many behaviors.

If you try to tell people too many things, they are likely to do nothing. It is important to focus on one behavior at a time. And, yes, this can be hard. As social marketeers, we have so many things we want people to do that it is tempting to try and "get it all in" at once. Avoid this urge and instead do a good job at addressing one behavior at a time. In the long run you will be more successful at changing behavior.

Example: Energy Efficiency Lighting Campaign

EPA worked with communities in North Carolina and Vermont to pilot a social marketing approach to get homeowners to replace recessed can lighting with ENERGY STAR labeled LED bulbs. The campaign used retail partnerships and incentives to prompt the desired behavior.

DESIRED BEHAVIOR	IMPACT	PROBABILITY	END STATE?	NON-DIVISIBLE?
Change to energy efficient LED lighting	High	High	Yes	Yes

Example: Behavior Chain

Decide to change out incandescent bulbs for energy-efficient bulbs → Research types of bulbs

Light bulb burns out → Go to store/online to look at bulb options → Purchase an LED bulb → Install LED bulb
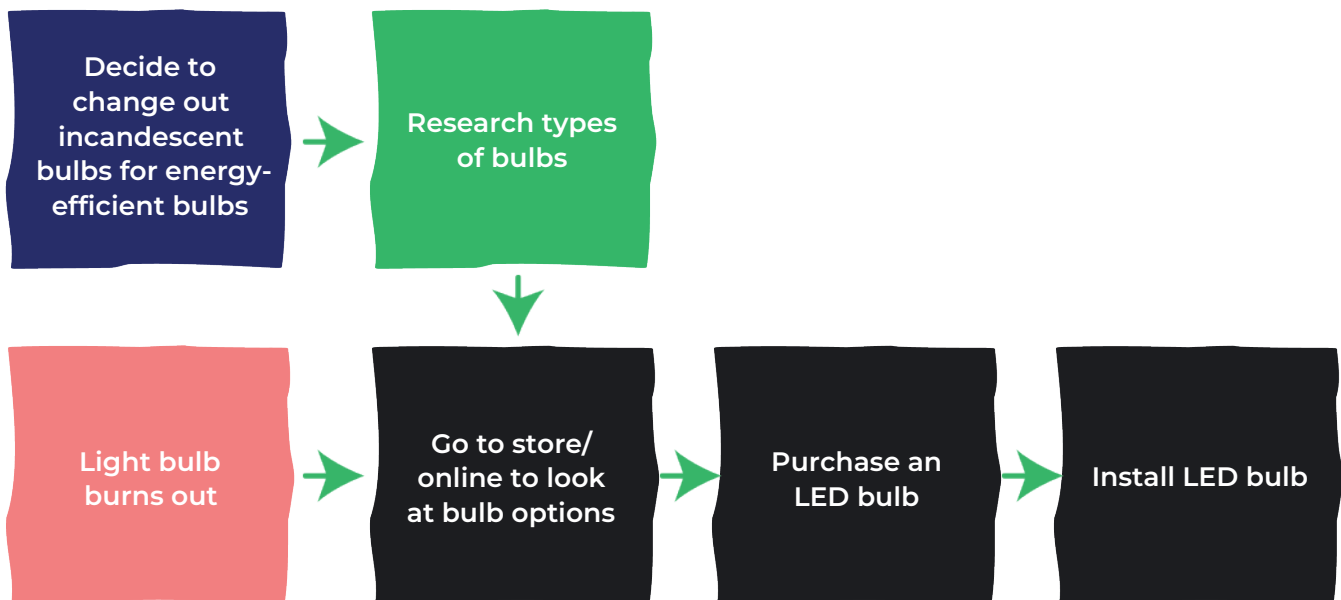
Step #3 Worksheet

DESIRED BEHAVIOR	IMPACT	PROBABILITY	END STATE?	NON-DIVISIBLE?

Step #4: The Who
Choose Priority Audiences

Your priority audiences are those that are most likely to be receptive to changing their behaviors and should be the focus of your campaign.
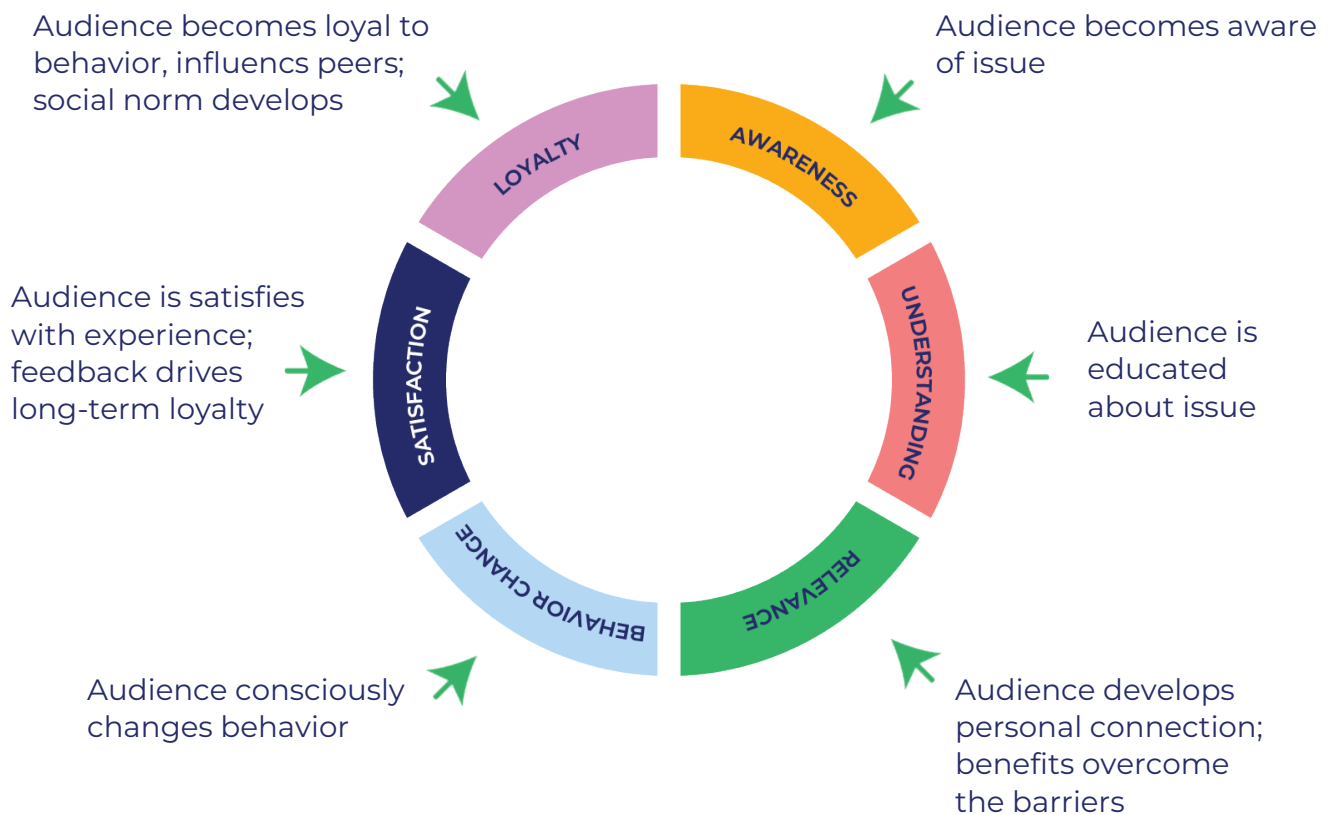
Planning Tips:

- Start by brainstorming all audiences

- Categorize each audience as follows:

    - Primary: Those whose behavior you are trying to change

    - Influencer: Those that can influence the primary audience to change their behavior

    - Gatekeeper: Those that can prevent or facilitate access to the primary audience (Note: It is sometimes possible to have an audience fall into more than one category)

- Choose your "priority" audiences—those that can most quickly and cost-efficiently get you to your goal

- Create a profile of each priority audience—what do you know about their demographics (e.g., Who they are? Where they live?) and their psychographics (e.g. What is important to them? What are their values and beliefs?)

- Consider if your audiences fall into the: "Show Me," "Help Me" or "Make Me" category. Social marketing campaigns are most impactful for the "Help Me" group

SHOW ME **HELP ME** **MAKE ME**

For each priority audience, identify the behavior you want to change and map your audience on the behavior change continuum:

Audience becomes loyal to behavior, influencs peers; social norm develops

Audience becomes aware of issue

LOYALTY

AWARENESS

SATISFACTION

UNDERSTANDING

BEHAVIOR CHANGE

RELEVANCE

Audience is satisfies with experience; feedback drives long-term loyalty

Audience is educated about issue

Audience consciously changes behavior

Audience develops personal connection; benefits overcome the barriers

Pitfall: Thinking your audience is "everyone."

Your audience is NOT "everyone" or the "general public." If you try to be everything to everybody, you will not be anything to anybody. To be effective you must define who your audience is in terms of the barriers, benefits and motivators related to your desired behavior change. This will never apply to everyone. To be effective, you need to segment your audiences so you can create custom strategies with unique barriers and unique motivators.

AUDIENCE ASSUMPTIONS

Example: Water-Efficient Irrigation Products

EPA's WaterSense program works with partners to have them label water-efficient products in order to help consumers choose in-home and irrigation products that use less water. For irrigation products, priority audiences can be mapped as show below.

AUDIENCE	PRIMARY	INFLUENCER	GATEKEEPER	PRIORITY?
Homeowners: ▪ Live in drought prone areas ▪ Have a yard	X			Yes
Homeowners' Associations			X	
Retailers		X		Yes
Manufacturers		X		Yes

Step #4 Worksheet

AUDIENCE	PRIMARY	INFLUENCER	GATEKEEPER	PRIORITY?

Step #5: Why They Do What They Do
Map barriers and motivation

Once you know what behaviors you want your priority audience to adopt, the next step is to analyze the barriers that are preventing them from doing the desired behaviors, and the possible benefits and motivators that could overcome those barriers. It is always better to start with a pilot and then scale larger. This allows you to learn from a smaller-scale implementation (in terms of audiences or geography) and then make adjustments before you invest in a full roll-out.

Planning Tips:

Correct identification of barriers is one of the most important steps.

Barrier
Anything that reduces the probability of a person engaging in the desired behavior

- Internal barriers: Knowledge, motivation, perceptions, assumptions

- External barriers: Lack of access, difficulty, cost

Benefits
Anything that increases the probability of a person engaging in the desired behavior

- Intrinsic: Personal reward for changing behavior–what's in it for me?

- External: Benefiting others, society, community or world

Motivators
Things that will motivate the audience to act to change their behavior

- If barriers cannot be overcome by motivators, pick a new behavior or increase motivators
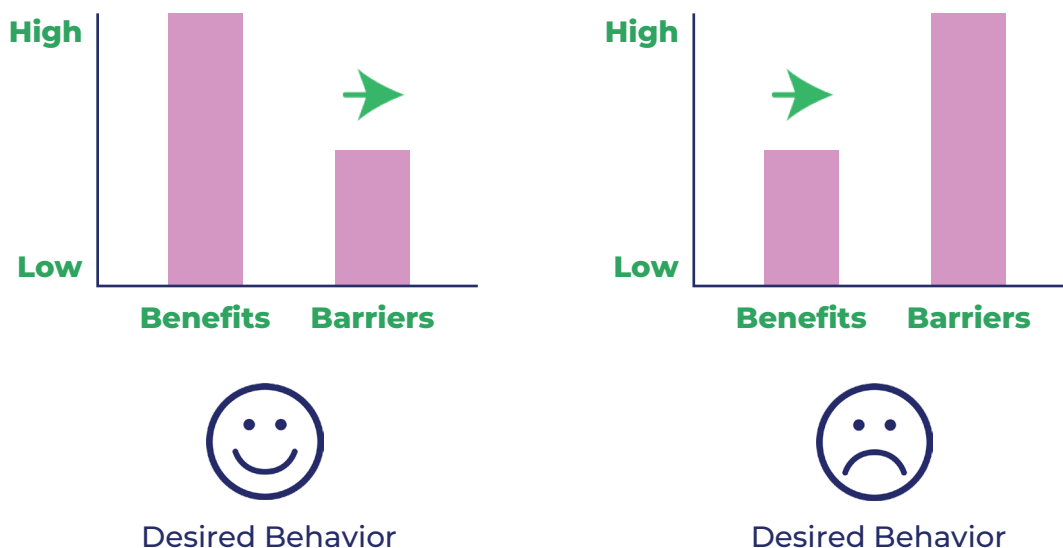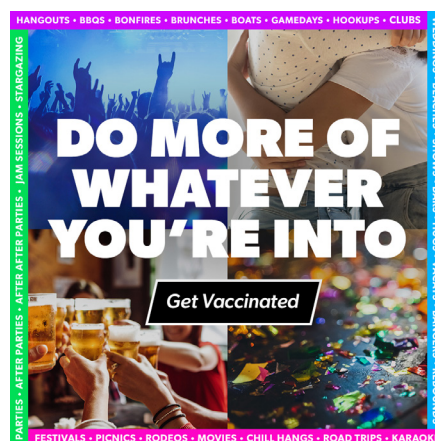
Pitfall: Buried in barriers.

Often it is too easy to come up with a long list of barriers that are preventing the desired behavior change. The key is to really narrow down to the top one or two things that are preventing change for your audience. Since you will be working to overcome key barriers through the strategies you choose and your messaging, you need to be singularly focused on overcoming the primary barrier that is in the way of change for your audience.

BURIED IN BARRIERS
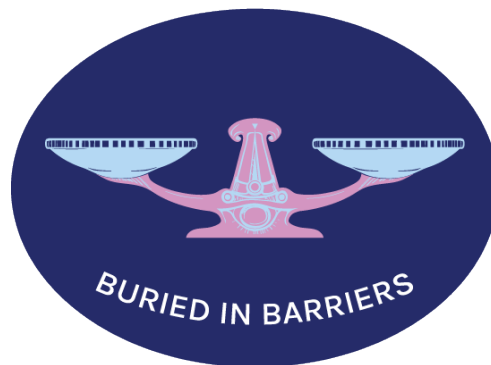
Example: COVID-19 Vaccinations Among Young Adults

In Spring of 2021, is became clear to the Washington State Department of Health that young adults were getting the COVID-19 vaccine at slower rates than the rest of the population. Research showed that young adults also had unique barriers and motivators that were causing them not to get vaccinated.

PRIORITY AUDIENCE	BARRIERS TO BEHAVIOR CHANGE	BENEFITS	MOTIVATORS
Young Adults age 18-29	▪ Not a priority/ apathy ▪ Don't think they need it ▪ Not that worried about COVID-19	▪ Will allow them to get back to doing the things they love to do ▪ Doing their part to help their communities get back to normal	▪ Easy access to the COVID-19 vaccine (bring the vaccine to them) ▪ No cost vaccines ▪ Vaccination requirements to participate in activities (e.g. sporting events, concerts)

Step #5 Worksheet

	PRIORITY AUDIENCE	BARRIERS TO BEHAVIOR CHANGE	MOTIVATIONS FOR BEHAVIOR CHANGE
Behavior Change			
Behavior Change			

Step #6: The How

Plan your community-based social marketing intervention

This step is the culmination of the process where you prioritize and choose what social marketing tools will work best to influence behaviors among your priority audiences.

Planning Tips:

Pick the primary tool/intervention that your social marketing campaign will be built around.

- What one thing will be key to overcoming the barrier to behavior change?
- What secondary tools could you use as well?

Social Marketing Tools:

- **Commitments:** Making a commitment to change a behavior makes it more likely that people will follow through. The more visible and durable the commitment is, the more likely the audience is to follow through. A visible commitment is one that is publicly shared. A durable commitment is one that persists and can be witnessed over time. It is also important to note that commitments that are made in writing are more effective than verbal.

- **Social Norms:** People will change their behaviors if they believe everyone else has done so. If your issue has a social norm present (most people already do the desired behavior) it can be a powerful strategy to point that out to the priority audience group you are trying to influence.

- **Social Diffusion:** Peer and reference groups (friends/family, people they work/go to school with, people in their geographic vicinity) spread behavior change through conversations, interactions and observation of each other. Looking for ways to spur social diffusion within your priority audience groups is an effective social marketing tool for many campaigns.

- **Prompts:** Placing reminders to act as close to the location of the behavior as possible (for example signage or mobile/text reminders).

- **Policy/Regulation:** Creating policies can help throughout the behavior adoption curve detailed in Step #4. Early on with the "Show Me" group, policies can build momentum for the desired behavior change. For the "Help Me" group they can help overcome barriers and build momentum for a social norm. For the "Make Me" group they can provide strong incentives or disincentives for not practicing the behavior.

- **Communication:** There are many communications tools that can be employed by social marketers. These tools seek to capture attention, overcome barriers with motivators and highlight benefits. Examples include advertising, media relations, social media and digital media. It is important to pick the tools/channels that have the best reach to your priority audiences.

- **Incentives:** Providing a tool or discount that helps overcome a barrier to trying the behavior. Incentives can be monetary (e.g. rebates on energy efficient products) or non-monetary (e.g. dog poop bags at parks).

- **Convenience:** This stems around making it easy to do the desired behavior. For example, providing free masks and sanitizing stations in public locations is one example of convenience. Automatic scheduling of your second COVID-19 vaccine appointment is another. Opt-out versus opt-in strategies are another example of a convenience tool. Many programs have shown that if people are asked to opt-out rather than asked to opt-in there is a much higher rate of participation–think of automatic enrollment in 401K or organ donation programs.

- **Cognitive Dissonance:** Many social issues have cognitive dissonance at play. This is when people's values and beliefs are not matching their behaviors. A good example of this is recycling. A recent study done by a county showed that 94% of people said they were "very good" recyclers and that recycling/reducing waste was very important to them, yet 50% of what was in garbage cans was recyclable. Clearly their recycling values were not matching their behaviors. If this is the case, a first step in a campaign can be to point out the dissonance to your audience.

- **Recognition/Feedback:** People want to know that their behavior is making a difference. Report back with messages like, "XX% of people or groups have committed to do the behavior" or "Thank you, you helped make a difference." This feedback acts to solidify the behavior habit among your audience by confirming that they made the right choice and their behavior is making a difference.

> **The most effective tactics reach audiences directly. Striving for personal engagement strategies will help ensure success of your social marketing effort.**
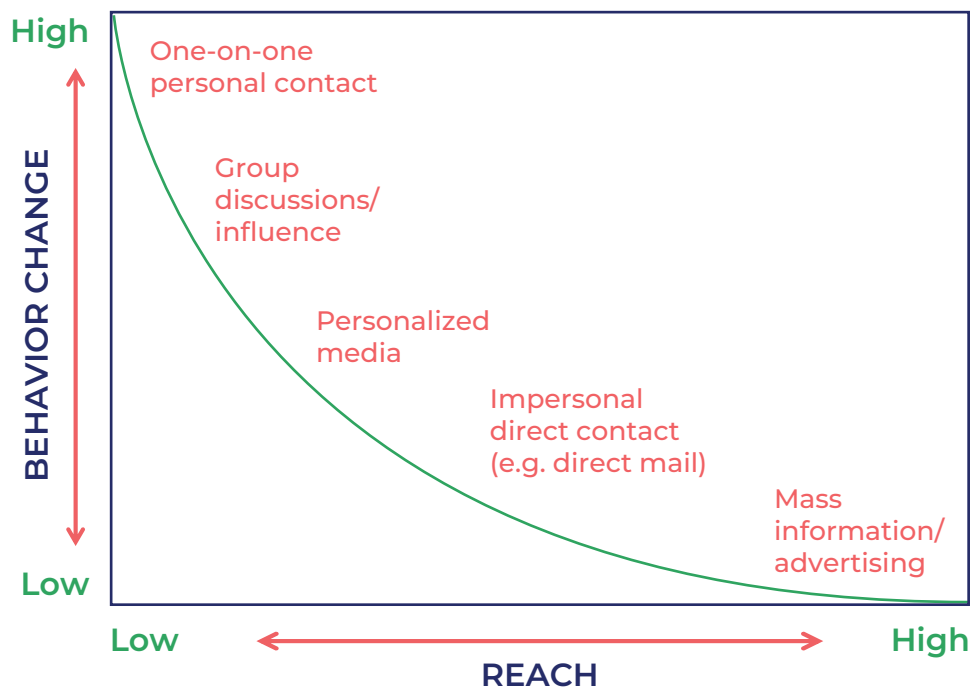
Pitfall: Thinking awareness leads to behavior change.

It is the logical assumption to make the conclusion that if someone knows about a social issue or a problem, that they will change their behavior to try and address it. This is not true. Behavioral science research has shown over and over again that awareness alone has no correlation to changing behaviors. This finding is the foundation that the social marketing discipline is built upon. Instead, you need to define the specific barriers to changing behavior for your audience, the benefits the behavior will provide them and the motivators you can offer to get them to act.

THINKING AWARENESS LEADS TO BEHAVIOR CHANGE

Example: Ojo con el cloro campaign

In Spring of 2021, is became clear to the Washington State Department of Health that young adults were getting the COVID-19 vaccine at slower rates than the rest of the population. Research showed that young adults also had unique barriers and motivators that were causing them not to get vaccinated.

Behavioral objective: Educate Latina moms about safe cleaning solutions that work as alternatives to bleach and empower them to try them at home by using the safer cleaning kit.

Key audience barriers:

1. Culture. Cleaning with bleach is ingrained in the Latino culture.
2. Awareness. Limited awareness about how to develop or purchase safer cleaning alternatives to popular chemical products like bleach.
3. Effectiveness. Safer alternatives not seen as effective as bleach.

Benefit: "By adopting safer cleaning practices at home, you are protecting your health and the health of your family."

Cloro + Otros limpiadores = Gases tóxicos

Social Marketing Intervention Strategy:

Based on the barriers, the social marketing intervention needed to motivate the audience by providing the tools they needed to successfully change their behavior. A safer cleaning kit was developed as the incentive for the campaign with the items moms would need to create the safer cleaning solutions.

Partnerships with community-based organizations, community events and community media influencers drove social diffusion among the Latina community around safer cleaning practices and helped distribute the safer cleaning kit incentives. Supporting communications strategies including a campaign website, ads and media relations helped distribute safer cleaning recipes to the audience.

Step #6 Worksheet

TOOL	TYPE	DESCRIPTION
Primary Social Marketing Tool		
Supporting Social Marketing Tool		
Supporting Social Marketing Tool		
Supporting Social Marketing Tool		

Step #7: What's the Hook?

Creating an effective messaging strategy

A succinct and compelling message strategy is critical to help ensure the success of social marketing efforts. We live in a world where the average person is exposed to between 2,000 and 3,000 marketing messages each day. We have about three to five seconds to catch someone's attention so that they continue reading or viewing to learn more. Once you've caught their attention, the average millennial will spend 14 seconds more on the content. For Gen Z, it's 8 seconds. This highlights the need to be compelling and very succinct in your message strategy.

Planning Tips:

- Create a value proposition for your program. The goal of a value proposition statement is to succinctly describe what you want your priority audiences to feel/believe about your program. (Note: in some cases you may need more than one value proposition to apply to various priority audiences.)

- The structure of a typical value proposition and an example of this structure in use is listed below:

    - "If I (desired action/behavior change) I will (reward/benefits of behavior) because (support)."

    - "If I purchase ENERGY STAR products I will feel good because I know that I am making a smart decision that will both help protect the environment and save me money on my energy bills."

- Value propositions are written in first person from the perspective of the priority audience.

- Create a message platform that expands upon your value proposition. Be sure to:

    - Try to find a "key insight" that will drive behavior change

    - Be simple (can the audience understand the main message in 3-5 seconds?)

    - Create an emotional connection with the audience

    - Write down what you want your audience to Think, Feel and Do as a result of your campaign

Pitfall: Selling features instead of benefits.

People buy benefits, not features. They don't want to hear about how something works, they want to hear about what it will do for them. Make sure your messaging strategy is focusing on benefits and resist the urge to explain features. Here are a few examples of headlines that illustrate focusing on benefits:

- Our 9pm news is like their 10pm news only you're awake" (news channel)

- "No one ever went to their death bed saying 'You know, I wish I'd eaten more rice cakes'" (chocolate company)

- "Save the crabs, then eat 'em" (government agency focused on water quality)

Example: Distracted Driving

The Washington Traffic Safety Commission created a campaign for moms of school aged children to encourage them to not use their phone while driving. The campaign tapped into the emotional desire to protect their children.

Creating Your Value Proposition

If I put my phone away while I am driving, I will be living up to my responsibility as a Mom to protect my children because I know that it is not safe to use my phone while driving.

Step #7 Worksheet

BUILDING YOUR MESSAGE PLATFORM
THINK: It's dangerous to use my phone in the car.
FEEL: It's my job to protect my children–if I use my phone in the car, I'm violating that responsibility.
DO: Put the phone away while driving.

Mapping your think, feel, do

THINK

FEEL

DO

Creating your value proposition

IF I:	
I WILL:	
BECAUSE:	

Step #8: Who Else Can Help?

Identify and enlist partners

Partnerships can help create demand for a program by providing access to a larger audience, incentives for program participants and adding credibility to the cause.

Planning Tips:

- Look for partners with complimentary missions/goals
- Partner audiences should overlap with your key audiences
- Make sure the potential partner has something of value to offer/bring to the table and that in turn you have something of value to offer to them
- Consider private, public and/or nonprofit sectors
- Identify potential local media partners that could provide added exposure to the program
- It is also good to look for partners with a history of collaboration and community involvement. A good partnership makes things easier, not harder.

Pitfall: Telling a partner why you need them; instead of why they need you.

When you approach a partner, always start with their perspective. Learn as much as you can about them before you reach out. Then, craft the conversation around their needs. Think of this as a mini social marketing plan. What are you asking the partner to do? What barriers are in the way for them? What benefits and motivators can you offer the partner?

WHY YOU NEED THEM

NOT WHY THEY NEED YOU

Example: Wildfire Ready Neighbors

Washington state is facing increased risk from wildfires. Most wildfires can be prevented; however, prevention only works if everyone in the community is taking action. The Washington State Department of Natural Resources created Wildfire Ready Neighbors that relied on a strategic combination of local partnerships, tailored commitments, approachable tools and communitywide outreach to get residents to take action to reduce wildfire risk by preparing their homes, properties and communities. Key partners for this effort included:

POTENTIAL PARTNER	COMPLIMENTARY MISSION/GOALS	TARGET AUDIENCE OVERLAP?	VALUE ADD FROM PARTNER	VALUE ADD FOR PARTNER
Fire departments	Y	Y	Provide local credibility to campaign	Help prepare local properties to reduce fire risk, making response to wildfire easier
Conservation districts	Y	Y	Have strong local connections in the community and a history of working with community members on wildfire preparedness	Help prepare local properties to reduce fire risk
Local elected officials	Y	Y	Provide credibility and communication channels to reach residents	Help protect lives and property in their community; alignment with an issue that is important to residents
Local community groups and non-profits	Y	Y	Provide communication channels to residents	Help protect their community

Step #8 Worksheet

POTENTIAL PARTNER	COMPLIMENTARY MISSION/GOALS	TARGET AUDIENCE OVERLAP?	VALUE ADD FROM PARTNER	VALUE ADD FOR PARTNER

Step #9: Chart the Right Path

Developing a communications plan

A fully developed marketing plan is crucial to the success of social marketing efforts. This plan shares how to operationalize social marketing tools and deliver the program's message to priority audiences, as well as define outreach strategies and tactics that will deliver on the program's goals and objectives.

Planning Tips:

- Never start with this step—make sure you've laid the foundation for effective strategies and tactics by completing steps #1-8 first

- All strategies and tactics should help to achieve the program goals and objectives

- Strategies are broad, tactics are specific.

    - Consider a range of ways that you can reach you priority audiences. A rule of thumb is that you should employ at least three different channels and try to reach your audience at least seven times with your message.

    - Focus on communication channels that make sense for your program. For example, if you are trying to drive people to a website, your strategy could be to deploy ads on digital and social channels where people can click to your website. Your tactics would be the specific types of ad platforms that you chose that make sense for your audience. If you are distributing an incentive that will help support you desired behavior change, a one-on-one event strategy where you can engage with your audience might be an appropriate strategy, with specific event participation being our tactics.

Pitfall: Starting with this step.

The main pitfall here is that people start with this step! They jump straight to figuring out how they want to communicate and tools they are excited about using rather than taking the time to complete steps #1-8 first. If you do start here, it is guaranteed that your program will not be as effective as it could be. It is critically important that you create your framework by completing the earlier steps before jumping into your marketing strategy.

START WITH THIS STEP

Example: Sexual Violence Prevention

The Washington State Department of Health developed and piloted a social marketing campaign focused on primary prevention of sexual violence (i.e. identify and change precursor behaviors that lead to abuse and sexual violence later on). The campaign audience was middle-school aged boys and the creative concept keyed off a central insight that middle schoolers are more likely to stay tuned in if offered something fun and unexpected to hold their interest.

What do you call someone who is taller, shorter, bigger, smaller, darker, lighter, skinnier, or stockier than you?

Their name.
#ItsAboutRespect

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Washington State Department of **Health**

#971-NonDOH January 2019

Strategy #1: Use digital communications to reach middle school age boys at each of the pilot schools.

Tactic: Ran a 5-week media buy to test ad tactics via YouTube, Snapchat, Facebook and digital display. Hyper-targeted by geography, age, gender and relevant interests (gaming, memes, sports, etc.).

Strategy #2: Place materials in schools to compliment digital campaign messagings.

Tactic: Installed posters in high traffic areas.

Strategy #3: Follow trauma-informed planning process using communication tools to prepare staff, teachers and parents ahead of the campaign.

Tactic: Partnered with school principals and counselors. Drafted materials for school staff and for parents that were distributed before the campaign.

Step #9 Worksheet

STRATEGY #1:	
Tactics:	
STRATEGY #2:	
Tactics:	
STRATEGY #3:	
Tactics:	
STRATEGY #4:	
Tactics:	

Step #10: Are We There Yet?

Creating an evaluation plan

The evaluation plan is designed to track the program's progress, celebrate successes and make necessary changes along the way. It includes measurements of campaign inputs, outputs, outcomes and overall campaign impact. Impact maps back to your campaign's purpose (see step 1).

Planning Tips:

- Create your evaluation plan before starting implementation
- Decide how to measure against each objective in terms of:
    - Inputs: The resources (budget, staff time etc.) that you put into a campaign
    - Outputs: The reach and engagement of your campaign (people reached, events held, social media engagements etc.)
    - Outcomes: What happened as a result of your campaign (number of people that changed their behavior or changes in awareness levels or attitudes)
    - Impact: Should map back to your campaign's purpose (see step 1)
- Set timelines and a corresponding data collection schedule—"I want to make this much progress towards this objective by this date"
- Look for trends in the data and be willing to course correct if the data is pointing you down a different path

Pitfall: Self-reporting bias.

Failing to account for self-reporting bias in the evaluation strategy is a common pitfall for this step. Self-reporting bias is when people answer a question based on what they think they should do, instead of accurately reporting their true behaviors. One perfect example of this issue is with recycling. If you ask people if they always recycle 80%+ will say yes. Yet, in many communities more than 50% of what is in garbage cans is still recyclable. Wherever possible, you can avoid self-reporting in your evaluation strategy by figuring out how to instead measure actual behavior changes rather than surveying people. For recycling, this could mean measuring actual recycling rates by looking in curbside recycling carts before and after your campaign. If you have to use self-reported data, ensure you have a baseline and measure the amount of change, not absolute numbers so that you can isolate the impact of self-reporting bias.

Example: King County Metro Just One Trip

King County Metro created a campaign that had the goal to help people ditch their car and try a more sustainable way to get around (bus, ridesharing, light rail, biking, etc.)..

Objectives:

- Recruit 15,000 people to pledge to try an alternative to driving alone.
- Motivate those participants to shift a total of 400,000 drive-alone trips to an alternate mode of travel

OBJECTIVE	MEASURED AT?	ACHIEVE THIS MUCH?	BY WHEN?	RESULT
Program sign-ups	Number of people that sign up and complete commute survey	15,000	End of program (12-month campaign)	21,262 program sign-ups
Trips switched to sustainable modes	▪ Orca card usage ▪ Comparison of pre and post commute surveys	400,000	End of program (12-month campaign)	861,621 trips switched

Step #10 Worksheet

GOAL

	OBJECTIVE #1	OBJECTIVE #2	OBJECTIVE #3	OBJECTIVE #4
Measured By?				
Achieve this Much?				
By When?				

Let's Talk

Need to convince the world to eat their metaphorical (or actual) vegetables? Great. Our team is led by internationally-acclaimed experts in community-based social marketing and we're ready to help you make the world a better place.

C+C | ALL ABOUT THE GOOD

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