WaterSense® Community-Based Social Marketing Workbook

A Guide to Using Social Marketing to Help Plan and Implement a WaterSense® Behavior Change Campaign

October 2023

EPA **WaterSense**

Contents

Cover photos: Left—Sonoma-Marin Water Saving Partnership, Top Right—Kaua'i County Water Department, Bottom Right—Kearns Improvement District

Before You Begin

This workbook explains how WaterSense® partners can use social marketing theory to enhance their water efficiency outreach efforts. This step-by-step guide includes how-to instructions, tips, and worksheets to walk you through the social marketing planning process.

While each of these steps may vary depending on your particular project, the U.S. Environmental Protection Agency (EPA) recommends reading the entire workbook prior to getting started to get a full picture of all that's involved in planning and executing a successful social marketing campaign.

Each section has a corresponding appendix with worksheets to fill out once you're ready to tackle individual steps.

Before you get started, it's also a good idea to identify key partners to participate in the early stages of your planning process. Strategic partnerships are described in more detail in Step 8, but you may wish to consider engaging certain partners at the outset and share this workbook with them so they understand the process.

The planning process steps outlined in this workbook are as follows:

- **Step 1:** What Is Success: Identifying Purpose, Goals, and Objectives
- **Step 2:** Stop, Look, and Listen: Defining Your Research Needs
- **Step 3:** The What: Identify the Desired Behavior Change
- **Step 4:** The Who: Choose and Prioritize Your Audiences
- **Step 5:** Why They Do What They Do: Map Barriers, Benefits, and Motivators
- **Step 6:** The How: Plan Your Social Marketing Intervention
- **Step 7:** What's the Hook: Creating an Effective Message Strategy
- **Step 8:** Who Else Can Help: Identify and Enlist Partners

What Is Social Marketing?

Social marketing is a discipline that uses marketing principles and techniques to influence behavioral change in priority audiences that will benefit society as well as individuals. It uses communications and other activities to influence behaviors for good.

Many of the strategies and tactics deployed in social marketing campaigns are similar to what people have used for years in traditional marketing efforts. The difference is that social marketing focuses on changing a specific behavior by overcoming the barriers to that behavior, then measuring whether the marketing efforts have made an impact.

- **Step 9:** Chart the Right Path: Developing a Communications and Implementation Plan
- **Step 10:** Are We There Yet: Creating an Evaluation Plan

If you have any questions about this workbook or WaterSense, contact the WaterSense Helpline at (866) WTR-SENS (987-7367) or watersense@epa.gov.

Why Use Social Marketing for Water Efficiency?

Social marketing has been used for decades in the public health and environmental arenas. Social marketing has helped promote issues such as energy efficiency, recycling, and water efficiency. Changing water-using behaviors is a perfect challenge for a social marketer. We know that information, tools, and, in many cases, incentives are available to help people use less water. However, many people have yet to change their behavior. Social marketing techniques can help water utilities and other organizations identify specific behavior changes they want to see in their communities or customers and design campaigns that overcome those barriers.

Social Marketing Campaign Example: Southwest Florida Water Management District "Skip a Week" Campaign

The "Skip a Week" Yard Watering Campaign by the Southwest Florida Water Management District (SWFWMD) is an example of using social marketing to boost water conservation efforts. By helping residents overcome misconceptions about the amount of water required for healthy lawns and to reduce yard water use, the campaign effectively demonstrates the collective power of individual actions in conserving water.

Through five videos, the campaign delivered a clear message that resonated with its audience, focusing on the behavior of reducing yard irrigation to no more than every other week for several winter months. With data-driven insights incorporated from formative research and a two-year pilot program, the campaign optimized its approach, minimizing planning costs for partners while maximizing impact.

The campaign validated its success and provided a roadmap for future initiatives through measured outcomes and robust data analysis. WaterSense partners can draw inspiration from this impactful campaign, leveraging its strategies to drive meaningful water conservation progress. The "Skip a Week" campaign presents a compelling case for partners to follow, guiding us toward a more sustainable and water-aware future. This workbook uses the Florida project as an example to demonstrate how to plan a water efficiency social marketing campaign and includes worksheets to help WaterSense partners develop their own social marketing efforts.

Step 1: What Is Success: Identifying Purpose, Goals, and Objectives

Identifying your program's purpose, goals, and objectives is the most important step in the social marketing planning process. Careful articulation of this step will help guide everything you do in steps 2 through 10.

It is important to make sure you have internal alignment within your organization about your purpose, goals, and objectives so that your team and management are in agreement about what you are trying to accomplish.

Clear definition will allow you to make smart decisions about your marketing strategies and tactics, as well as make efficient use of your resources. Keep in mind that you may also need to do some baseline research (using methods outlined in Step 2) to fully understand which goals and objectives are the most appropriate and realistic for your program.

Your purpose is why you are doing what you are doing. Goals are what you want to accomplish with your social marketing program, and objectives are how you will get there.

- Your **Purpose** ties back to why your organization is doing the program. Your purpose can be for internal use only or communicated externally if it aligns with the message strategy for your priority audience. For example, save water in your community to ensure supply for future generations.
- **Goals** are what you are trying to achieve and should be long-term and broad (e.g., reduce per-capita water consumption).
- **Objectives** should focus on the desired behavior changes, be specific and measurable, and should tie directly to one or more of your goals (e.g., have 20,000 WaterSense labeled toilets installed in homes in the first year, reduce outdoor water use by 20 percent).

Tips

- Create one goal that addresses your overall marketing program success: What does success look like two, five or 10 years from now?
- Goals should tie into your purpose.
- There is no set number of objectives; determine what is needed to help you reach your goal.
- Be realistic about your expectations; don't aim too high or too low.
- Make sure you have a way to measure each objective.
- Objectives aren't set in stone. They may end up changing over time as you work through the steps and as you implement your program.

Pitfall to Avoid

Objectives are not measurable. It is important to ensure that you set measurable objectives up front. You need to figure out how you are going to measure against your 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.

"Skip a Week" Example

The SWFWMD wanted to reduce outdoor water use during cooler months. Data from the University of Florida told them that lawns only needed to be watered every 10-14 days during the cooler months while most residents had a habit of watering weekly all year. They framed a campaign with the following Purpose, Goal, and Objectives:

Example Worksheet #1: Purpose, Goals, & Objectives	
Purpose: Ensure adequate water supplies	
Goal: Reduce wasteful outdoor use of water	
Objectives	**How Measured?**
Objective: Reducing yard irrigation to no more than every other week from December through February.	Pre- and post-campaign survey
Objective: Overcome misconceptions about the amount of water required for healthy lawns.	Pre- and post-campaign survey

See Planning Worksheet in Appendix A.

Step 2: Stop, Look, and Listen: Defining Your Research Needs
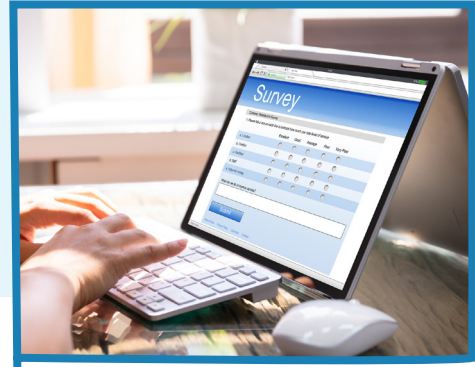
Research is a necessary part of the planning process. Effective social marketing campaigns and materials are grounded in research. Research should be used to understand priority audiences' current actions and identify what they think and feel about the subject matter and behaviors. It can also be used to help evaluate a program's effectiveness.

Research Tools

Quantitative research involves creating a statistically relevant profile of your priority audiences or information by the numbers. It is ideal for identifying and compiling data on audience demographics (age, income, etc.); current behaviors (how they act); and attitudes (how they think or feel). Possible sources include online, mail, or phone surveys.

Qualitative research delves deeper into that community's beliefs and values and can be used to test messages and concepts. Usually conducted with a smaller number of priority audience members, it should be used as a guide for decision-making on specific strategies. However, it should not be used to predict the behavior of your priority audience at large, because the sample sizes are too small to extrapolate widely. Possible sources include focus groups or one-on-one interviews.

Observational research tools are some of the best types of research in helping plan and evaluate a social marketing campaign. 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-campaign data for evaluating behavior change from your efforts. An example of using observational research to help plan a campaign would be observing how and when people water their yards and lawns. An example of using observational research for evaluation would be observing lawn watering behaviors before and after a campaign.

Choosing the Right Research

It is important to note that different research techniques have different levels of investment. Online surveys, targeted interviews, and diaries can be a cost-effective way to gain information. More involved techniques such as focus groups can be more expensive, so make sure you are conscious of your budget when creating your research plan. If you have a limited research budget, low-cost methods can still provide valuable insight. Research does not need to be expensive, but it does need to be conducted with members of your priority audience. Picking the right research for your needs is a key step in your planning process. See the table on page 8 for things to consider when selecting research.

Before you embark on creating new research, look for existing sources first and fill in the gaps. Existing research sources include studies or surveys conducted by others that have examined the same type of information you are trying to gather. Consider the following examples:

Types of Research	How It Is Used	Things to Consider
Quantitative surveys (online, mail or phone)	• To gather statistically significant data about your audience, such as who they are and how they think, feel, and act • To gather baseline data for evaluation and tracking	• People are less likely to answer cell phones if they don't recognize the number, which has made it harder to get representative samples from telephone surveys. • Include a series of screening questions up front to ensure you are gathering data from your priority audience. • Online surveys have become the norm for quantitative polling and have the advantage of allowing you to show visual items.
Focus groups (in-person or online)	• To test messages • To test creative concepts • To delve deeper into audience values and motivations	• One vocal participant can influence the whole group. You can get around this by incorporating some exercises where you have participants write down their initial reactions or thoughts to items you want to test before you open it up for group discussion. • You will need to offer incentives for participation; the bigger the incentive, the less time you will need to spend on recruitment.
Intercept surveys (one- on-one surveys at malls, parks, etc.)	• To test messages • To test creative concepts	• You need to keep surveys short—5 to 10 minutes. • Go to locations where your target audience gathers.
Behavioral observation (in person or via video)	• To learn the specifics of how your audience is doing the behavior you want to change • Can also be used to measure actual behaviors before and after your campaign intervention	• If your campaign is behavior-based, observation is a great way to get insight into how your audience behaves. For example, recruit a group of households in your area that would agree to have their water meter or fixtures in their home monitored over a period of time to see when and where they are using the most water.

Executive interviews (in-person, phone, or online)	• To gather input from influencers and subject matter experts on program design and marketing strategies	• You can use these interviews as an opportunity to brief key participants about your efforts, as well as gather information.
Diaries (priority audiences keep a diary of their behaviors and feelings)	• To determine behaviors, as well as the barriers and motivations for changing a behavior	• Try to design a methodology so that it is not obvious what you are trying to figure out. You can do this by having them track their behaviors and thoughts around several activities rather than just what you are interested in.

- Local universities and graduate students conduct academic studies; consider using their research or inquire whether students would be willing to conduct primary research on your behalf as part of their studies.
- Environmental organizations and foundations often have research they are willing to share.
- Local media (e.g., local television stations and newspapers) often have useful data on priority audiences. If advertising may be part of your marketing plan, you can request the media priority audience segmentation information from the various media outlets.
- Local data sources, including other city departments, state agencies, and mission-driven nonprofit organizations, may exist.
- Federal government data sources such as the U.S. Census data can provide relevant information for your region.

Tips

- Use research to accomplish the following:
  - Help define or narrow your priority audiences.
  - Identify current actions related to your possible behavioral changes.
  - Find out what your audiences think and feel about the issue.
  - Test messages and approaches.

Pitfall to Avoid

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 (who are not part of the priority audience group) influence decisions in a way that is counter to what you learned in the research.

"Skip a Week" Example

The SWFWMD used a combination of research sources to inform the campaign. They evaluated secondary research and data from the University of Florida, as well as water use statistics to help define the scope and behavior change of the campaign. They used both quantitative surveys and focus groups to identify priority audience groups, then identified the barriers and possible motivators to them changing lawn watering behaviors in the winter months. Findings from these research approaches will be outlined in further steps of this workbook.

Example Worksheet #2: Defining Your Research Needs	
What information do we need?	**How can we get it?**
How often does grass need to be watered in winter months?	University of Florida data
Where are households consuming/wasting the most water?	SWFWMD data
Who is the priority audience that could be receptive to watering lawns less frequently?	Survey of 802 residents
What are their barriers and potential motivators for watering less frequently?	Focus groups
Test effectiveness of messages and ad concepts	Focus groups
Program evaluation	Pre- and post-campaign survey of 1,152 homeowners

See Planning Worksheet in Appendix B.

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 goals. Choose your desired behavior changes by evaluating the following factors:

- 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.

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.

Impact	Low Probability	High Probability
High		**Behaviors with good potential in the quadrant**
Low		

Probability of Change: Low — High
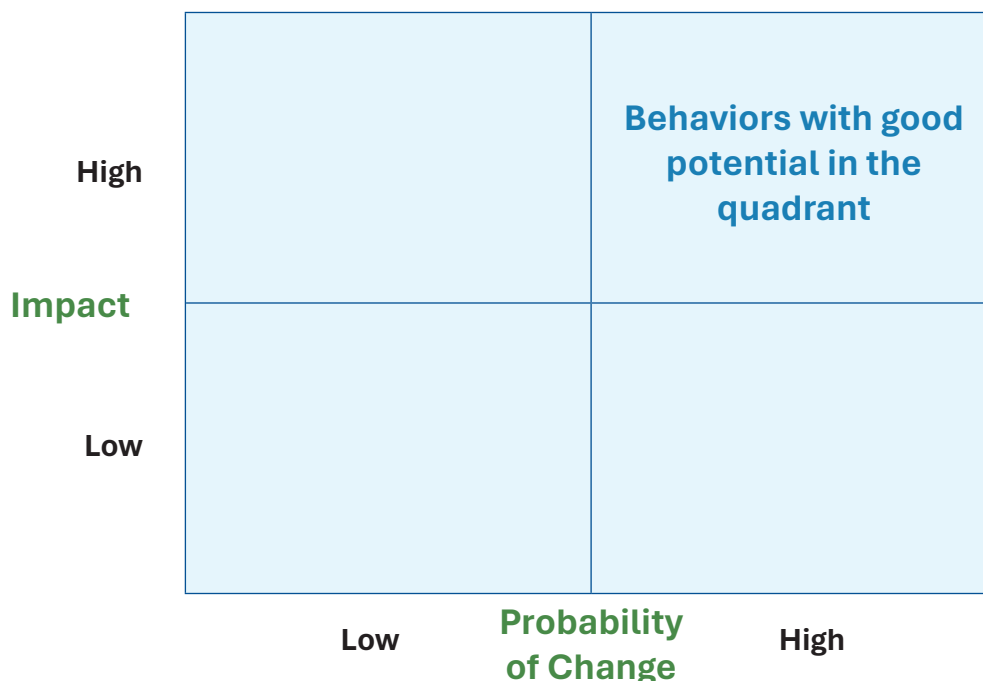
Tips

- If you have multiple behaviors you want to address, consider spacing them out so that you focus on one behavior at a time.
- 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, then identify where you need to start with your audience.

Pitfall to Avoid

Choosing too many behaviors. If you try to tell people too many directions, 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 marketers, 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. You will be more successful at changing behavior in the long run.

"Skip a Week" Example:

The Skip a Week campaign focused on one specific behavior change: Reducing the frequency of outdoor irrigation to once every other week during a winter period from December through February.

Example Worksheet #3: Desired Behavioral Changes				
Desired Behavior	**Impact**	**Probability of Change**	**End-State?**	**Non-Divisible?**
Reduce yard irrigation to no more than every other week December through February	High; potential to reduce a large amount of water use	High; barriers can be overcome with motivators	Yes; the behavior will reduce water use	Yes; the behavior is a singular activity that will lead to less water use

See Planning Worksheet in Appendix C.

Step 4: The Who: Choose and Prioritize Your Audiences

Athens-Clarke County Public Utilities Department's packets designed for apartment renters.

Priority audiences are individuals or groups of community members that your program needs to influence in order to change behaviors. These audiences will play a number of roles in your social marketing campaign's success, so it is important that you divide them into appropriate categories. This will allow you to identify the role each audience segment will play and make it easier to prioritize your outreach to each segment.

For this step, you should start with brainstorming all the potential audiences that have a role in the behavior you are trying to change. When brainstorming, make sure you consider audiences that you may not intend to reach directly—they may still play a role in your program.

Once you have your brainstormed list, work to categorize audiences based on the role they play in changing the desired behavior. It is possible to have your audience fall into more than one category. Below are three audience categories to consider:

- Primary: Those whose behavior you are trying to change.
- Influencer: Those who can influence the primary audience to change their behavior.
- Gatekeeper: Those who can prevent or facilitate access to the primary audience.

After categorizing your different audiences, you must now choose which of these you will consider your priority audiences—those who can most quickly and efficiently get you to your goal.

Once you have identified your priority audiences, it is important to gain a deeper understanding of the people in each group. To get a comprehensive understanding of your priority audience members, examine the following characteristic levels. You may already have some of this information from Steps 1 through 3, but this is your chance to make sure you have learned all you can about your priority audiences:

- Demographics: Who they are based on age, income level, gender, geography, etc.
- Behavioral Characteristics: How they act now in relation to the behavioral change you are seeking.
- Psychographics: What they feel, their attitudes, values, lifestyles. and opinions.

Create a profile of each priority audience based on this information. This profile will help guide you in decision-making for the rest of the social marketing planning process.

Another important step is to consider where your audiences sit on the behavior change continuum illustrated below. It is important to note that behavioral science research has shown that there is no correlation between awareness and a person changing their behavior. However, awareness is a necessary first step for many social issues. On this continuum, an audience first becomes aware of the issue (awareness), and then they need to learn a little more about the issue and the desired behavior change (understanding). Once they are informed, they need to develop a personal connection to the issue by understanding how the benefits they could receive outweigh the barriers to changing their behavior (relevance). This is the most important step on the behavior change continuum, as it is where the audience develops a personal connection to the issues/behavior. Once relevance is established, the audience tries the behavior for the first time (behavior change). It is critically important that the audience has a good experience when they try the behavior (satisfaction) so they are willing to repeat the behavior and form a habit (loyalty). The loyal customer of the behavior can now advocate for the behavior with others, feeding awareness and growing a social norm.

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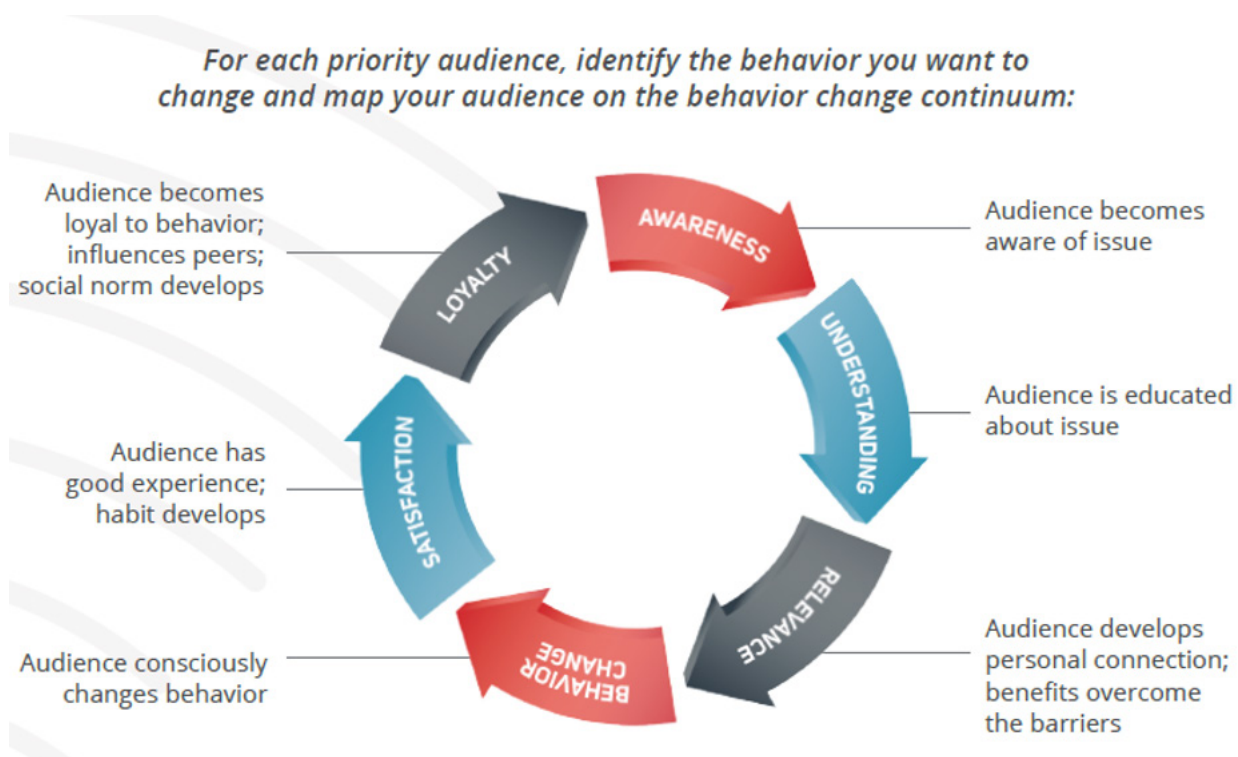
Tips

- Try to avoid making assumptions based on the way you think or feel. You are not the target audience (you know too much about the subject).
- Choose the priority audiences that are most likely to be receptive to your issue, e.g., lowest hanging fruit first.
- Build a profile of each priority audience segment to help guide the rest of your planning process.

Pitfall to Avoid

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.

"Skip a Week" Example

The SWFWMD regional service area distributes water to 16 counties in west central Florida. This campaign targeted a geographic segment that was affected by the drought. The primary audience was decision-makers regarding lawn-care in households that had irrigation systems. The survey identified that about 50 percent of these households tended to use more water on their lawns than was recommended and were also interested in learning how to reduce water use.

In addition to the primary audience, several influencer audiences were identified that could help spread messages for the campaign. Homeowners' associations were identified as an audience that was a potential influencer but also posed as a potential gatekeeper for outdoor watering behaviors.

Example Worksheet #4: Audience Brainstorm and Categorization				
Audience	**Primary**	**Influencer**	**Gatekeeper**	**Priority?**
Households that water their landscape with an automatic irrigation system	X			Yes
University extension agents		X		Yes
Master gardeners		X		Yes
Homeowners' associations		X	X	Yes

See Planning Worksheet in Appendix D.

Step 5: Why They Do What They Do: Map Barriers, Benefits, and Motivators

Citrus County Utilities employees sharing why homeowners should switch to WaterSense labeled showerheads.

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.

Barriers are the things that stand in the way of the audience changing its behavior, while benefits and motivators help overcome the barriers to spur change. Correct identification of barriers is one of the most important steps. Effective social marketing campaigns define and address the specific barriers to each behavior and use specific motivations and benefits to overcome those barriers. You should determine what barriers, benefits, and motivators exist for each priority audience group in relation to the desired behavior change—these factors will affect the audience members' ability to take action.

Tips

- Try to avoid making assumptions based on the way you think or feel. You are not your audience (you know too much about the subject).

- Make sure you gather enough deep information about your priority audiences. It is important to know their attitudes and beliefs about the subject and what motivates them to act on an issue.

- Try to define the one primary barrier to your desired behavioral change. This information is imperative when creating a

Barriers

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

- Example: Incentives and trainings that make the behavior easy and convenient

social marketing strategy that can overcome the barrier and lead to your desired behavioral change.

- Re-evaluation may be necessary at this stage. If your barrier is too large to overcome, you may need to go back and choose another behavioral change you can realistically impact or increase your benefits and motivators to overcome the barrier.

Pitfall to Avoid

Buried in barriers. It is often very easy to come up with a long list of barriers that are preventing the desired behavior change. The key is to really narrow them 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.

"Skip a Week" Example

The survey and focus group research conducted by SWFWMD identified the barriers, benefits, and motivators to reducing the frequency of lawn watering in the winter. The primary barrier was concerns about lawns dying if not watered weekly. This barrier could be overcome by hearing from trusted sources, including neighbors, that overwatering could actually harm your lawn and that watering less could save both water and time.

Example Worksheet #5: Barriers, Benefits, and Motivators to Desired Behavior Change			
Desired Behavior Change: Reduce lawn irrigation to no more than every other week December through February			
Priority Audience	**Barriers to Behavior Change**	**Benefits for Behavior Change**	**Motivators for Behavior Change**
Receptive households that water their landscape with an automatic irrigation system	**Key Barrier:** • **Worried that lawns will die** Other Barriers: • Habit	**Key Benefits:** • **Protect lawn health** • **Save time** Other Benefits: • Neighbors not thinking they water too much • Save water	**Key Motivators:** • **Knowledge that overwatering can harm lawns** • **Hearing from neighbors** Other Motivators: • Knowledge that lawns do not need to be watered weekly in winter months

See Planning Worksheet in Appendix E.

Step 6: The How: Plan Your Social Marketing Intervention

Metropolitan North Georgia Water Planning District encouraging residents to chase down leaks at the Annual Water Drop Dash 5k.

This step is where you prioritize and choose what social marketing tools will work best to influence behaviors among your priority audiences. Start by picking 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:

The following social marketing tools are examples of evidence-based strategies that have been proven to help change consumer behaviors. You'll want to pick tools that have the best fit for your program, your priority audience, and the behaviors you are trying to change.

- **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 will 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 made in writing are more effective than verbal.

- **Social Norms:** People will change their behaviors if they believe most people have 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).

- **Communication:** There are many communication 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. In Step 9, you will create your communications plan for your program.

- **Incentives:** Providing a tool or discount can help overcome a barrier to changing the behavior. Incentives can be monetary (e.g., rebates on water-efficient products) or non-monetary (e.g., free shower timers).

- **Convenience:** This stems around making it easy to do the desired behavior. For example, providing free lawn watering gauges is an example of convenience. 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 do not match their behaviors. If this is the case for your program, 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 such as, "XX percent 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 behavior change tactics reach audiences directly. Striving for personal engagement strategies will help ensure your social marketing efforts succeed.
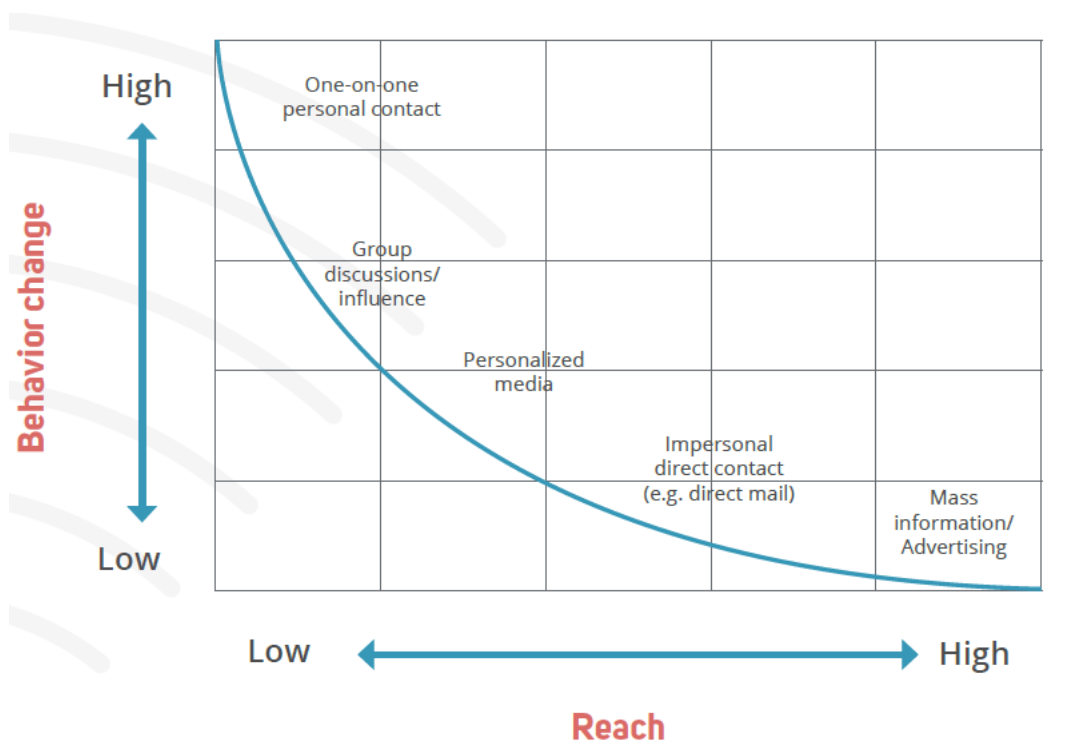
Tips

- Pick the tools that best align with the needs of your campaign.
- Try to include at least one tool that delivers personal, direct engagement.
- Communications alone as the only tool is typically not enough.

Pitfall to Avoid

Thinking awareness leads to behavior change. It is a logical assumption to make the conclusion that if someone knows about a social issue or a problem, they will change their behavior to try and address it. This is not true. Behavioral science research has shown that awareness alone typically 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.

"Skip a Week" Example

Surveys commissioned by SWFWMD showed that residents preferred receiving lawn maintenance information from their neighbors and other trusted sources. SWFWMD created a communications campaign that leveraged this finding by featuring two neighbors (Tom and Stan). The communications campaign was supported with three additional social marketing tools: social diffusion, social norms, and prompts.

Example Worksheet #6: Social Marketing Tools		
	Social Marketing Tool	**Description**
Primary Social Marketing Tool	Communication	Materials and ads featuring two neighbors: "Tom and Stan"
Supporting Social Marketing Tool	Social diffusion	Messages delivered through university extension agents and master gardeners
Supporting Social Marketing Tool	Social norms	Behavior modeled neighbor to neighbor and by homeowners association (HOA) members that agreed to biweekly irrigation schedules
Supporting Social Marketing Tool	Prompts	"Skip a Week" inserts in utility bills reminded people to water less frequently

See Planning Worksheet in Appendix G.

Step 7: What's the Hook: Creating an Effective Messaging Strategy

Houston Public Works encourages residents to use the Water My Yard app to help them save water outdoors.

A succinct and compelling message strategy is one of the most important things you can do to help ensure the success of your 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. You have about 3 to 5 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. Effective campaigns use emotion (heartfelt, humor, etc.) to connect with audiences. The "Skip a Week" campaign, for example, used humor to connect residents with the message through the interaction of two neighbors: Tom and Stan.

This section covers how to develop a message strategy for your social marketing program.

The Message Map

A *message map* succinctly describes what you want your priority audiences to feel and believe about your program. The audience analysis and behavioral change information you determined in Steps 3, 4, and 5 will help determine your message map. It includes the key message you wish to communicate about your program and articulates the desired tonality of the message. You should develop a message map based on the information you've compiled, then use creative writing to help fine-tune the messages for your campaign. The message map has three components: An articulation of what you want your audience to Think, Feel, Do, a main message statement, and supporting facts or "proof points" that back up your main message.

The first step is to write down what you want your audience to think, feel, and do as a result of your campaign. Next, craft a simple main message statement. This is a succinct, one-sentence articulation of your campaign's main message point (remember, you only have three to five seconds to catch their attention!). Write your main message in the first person from the perspective of your priority audience.

The last part of your message map is to identify facts or proof points that can support your main message and add credibility to your message (e.g., "Did you know that 50 percent of the water we use outdoors is wasted?").
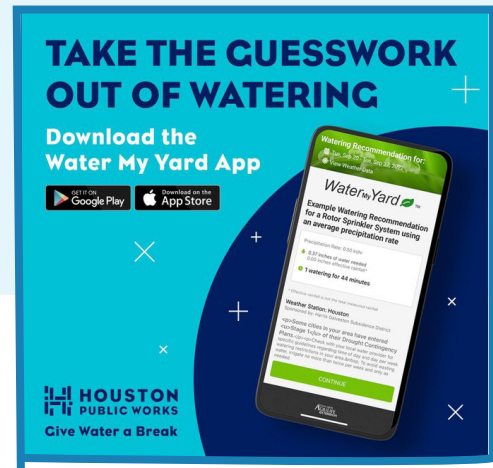
Tips

- Try to find a "key insight" that will drive behavior change.
- Try to create an emotional connection with the audience.
- Sell the benefits of your program to the priority audience, rather than the features.
- Avoid telling the priority audience too much; use your message map to define one key message for each that motivates or overcomes the main barrier to the desired behavioral change.

Pitfall to Avoid

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 focuses on benefits and resist the urge to explain features. Here are a few examples of headlines that illustrate focusing on benefits:

- "Our 9 p.m. news is like their 10 p.m. 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)

"Skip a Week" Example

The following example demonstrates how a message map could have been constructed for the "Skip a Week" project based on the behavior and the research that was conducted.

Example Worksheet #7: Message Map	
Think	To keep my lawn healthy, it needs less water during the winter.
Feel	I don't want my neighbors to think I overwater my lawn.
Do	Only water my lawn every other week in the winter.
Main Message	By joining my neighbors to skip a week of watering this winter, I can save water and time and ensure I keep my lawn healthy.
Support Points	• If everyone skipped one week of irrigation this season, it could save an estimated 1.9 billion gallons of water. • More than half of the water used by households is used outdoors, and much is wasted. • Overwatering leads to unhealthy lawns. • Lawns only need to be watered every 10 to 14 days between December and February.

The resulting campaign featured "Tom and Stan," two neighbors that educated the community about the benefits of watering less frequently and helped normalize the behavior.

See Planning Worksheet in Appendix H.

Step 8: Who Else Can Help: Identifying and Enlisting Partners

Athens-Clarke County Public Utilities Department partnered with other local departments, presenters, and volunteers to host the Athens Water Festival.

Partnerships can help create demand for your program by providing access to a larger audience, incentives for program participants, and added credibility to your cause. The best partners will have a complementary mission or goal, audiences that overlap with your priority audiences, something of value to bring to the table, and a need for value that you can offer in return.

For example, WaterSense relies on partnerships with water utilities, product manufacturers, and retailers to support communications efforts, events, and outreach across the country.

When searching for a partner, keep the following in mind:

- Look for partners with a history of collaboration and community involvement. A good partnership makes things easier, not harder.
- Be sure to consider those in the private, public, and nonprofit sectors.
- Identify potential local media partners that could provide added exposure to the program.

Partnership Agreement

A written agreement is an important component of partnership development. This document defines the roles and expectations of each partner. It need not be a formal legal document, but rather a way to bring all parties to agreement about the terms, scope, and duration of the partnership. It should outline the following:

- What, specifically, each partner will provide, e.g., "Partner A will draft, design and produce 1,000 brochures to hand out at community events."
- How roles and approval processes will work, e.g., "Partner A will draft copy for collateral materials, with input and suggestions from Partner B. Final approval and decision-making will rest with A."

You can find a customizable partnership agreement worksheet in Appendix I.

Tips

- Be sure that the value you will receive from the partnership is worth the time spent coordinating and implementing the partnership. Make sure you can't do it cheaper or easier on your own.

- Look for complementary missions and goals.
- When meeting with potential partners, sell the value they will receive from partnering. As with your other priority audiences, partners will buy benefits, not features.

Pitfall to Avoid

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?

"Skip a Week" Example

SWFWMD partnered with a number of organizations in Southwest Florida to help build credibility, spur social diffusion and social norms, and distribute campaign messaging.

Example Worksheet #8: Partnership Planning Worksheet				
Potential Partner	**Complementary Mission/ Goals**	**Target Audience Overlap?**	**Value Added from Partner**	**Value Added for Partner**
HOAs	Yes	Yes	Reach to audience, ability to encourage and model desired behavior	Member education, alignment with community issue
Utilities	Yes	Yes	Reach to audience through utility bill inserts	Help manage drought and meet water conservation goals
University Extensions	Yes	Yes	Trusted source for yard care information, provide educational resources to audiences	Alignment with important community issue

Mast Gardeners	Yes	Yes	26	Trusted source for gardening information, 1:1 interaction with priority audience	Alignment with important community issue

See Planning Worksheet in Appendix I.

Step 9: Charting the Right Path: Developing Your Communications and Implementation Plan

Citrus County Utilities employee sharing information with a resident at tabling event.

A fully developed communications plan is crucial to the success of your social marketing efforts. This plan shares how to operationalize social marketing tools and deliver the program's message to priority audiences. It includes details about the communications strategies and tactics that will deliver on the program's goals and objectives. It's tempting to start with this step, but laying the groundwork in Steps 1 through 8 will make your social marketing efforts more effective. Use the worksheets you've completed to build the front of your communications plan and then define which strategies and tactics will deliver on your program's goals and objectives.

Strategies are broad statements about how you will communicate your program to your audiences, e.g., partner with a big box retail chain to promote rain sensors.

Tactics are specific ideas about what you will do to complete your strategy. Each strategy will have its own associated list of tactics (e.g., create in-store point-of-purchase signage for rain sensor promotion, train retail staff on rain sensors and promotion details).

Choosing Communications Channels

Below are some possible communications channels that could be part of your marketing plan; each has its strengths and uses, depending on your objectives and audiences. You don't have to limit yourself to this list—choose whatever the best channels are to reach your audience with your campaign's message. The WaterSense partner site (http://www2.ergweb.com/wspartner/materials/were-for-water.html) has customizable tools created for partner use that can get you started.

- **One-on-One Outreach:** This is the most effective form of communication used to create behavioral change. This tactic uses face-to-face interactions and existing personal networks to create and reinforce social norms (e.g., peer pressure). For best results, look for a trusted advocate who can carry your message to an audience in a personable but influential manner.

- **Public Relations:** Public relations tactics add third-party credibility to communicate your message. A media story is typically more trusted by audiences than an advertisement. With public relations, however, you may not be able to control the end message when the media is communicating for you. To be effective in getting media coverage, you must have real news to communicate and provide facts and visuals.

- **Social Media:** Use of social media platforms is a necessary part of most social marketers' toolkits. Social media can help your audiences engage, share, interact', and participate with each other—and with you. Social media can be used organically or with paid ads. It usually makes sense to focus on just a few channels that are preferred by your priority audience since you will need to maintain activity and engagement on any channels you create.

- **Advertising:** Print, broadcast, digital, social, outdoor, and direct mail advertising can be expensive, but as the creator, you will have 100 percent control of the message. Be sure to craft your message to overcome barriers and choose advertising placements with the best reach to your audience. The message should be simple, emotional, and timely.

- **Events:** This tactic allows for direct contact with audiences. Effective events will deliver messages at locations where the priority audience already gathers and practices the behavior. Events allow your message to establish a leadership position to the present audience, as well as continue any momentum that your campaign has already generated through other tactics.

Creating your Communications Plan

With your channels chosen, it is now time to assemble your communications plan. Below is a typical outline for a plan. You'll see that most of the sections will be populated from the work you've done in the other steps of the social marketing planning process.

- I.   Purpose, Goals, and Objective
- II.   Research Insights
- III.   Desired Behavioral Changes
- IV.   Priority Audiences
- V.   Message Strategy
- VI.   Social Marketing Tools
- VII.   Partners
- VIII. Communications
    - a.   Channels
    - b.   Timeline and Budget
- III.   Evaluation

Implementation

Implementation is where the magic happens! This is where you'll put all your previous work to use in deploying your social marketing campaign. Following are some important things to remember:

- **Staffing:** Identify one overall project manager for marketing and outreach activities; this person should have the power to make day-to-day decisions to keep things moving, as well as the ability to call together key decision-makers at major milestones. To support the project manager, appoint one person as the lead on each tactic in the implementation phase and check in regularly on progress.

- **Work Plan:** Your work plan tells you what you're going to do, when you're going to do it, and who will be responsible. This document doesn't need to be overly complicated, but it should include a timeline and estimates on staffing needs and resources. Consider including top-line audience, objective, and evaluation info in your work plan to ensure that each strategy and tactic is mapping back to these steps.

- **Budget:** Be realistic when developing your budget for the implementation phase. Ensure that the resources are available for each strategy and tactic you employ. Often, it's better to put more resources into a select number of tactics and really do them well than to spread your budget too thin. And remember, if budgets are tight, partners with similar interests may be able to help you combine efforts and maximize your resources.

Tips

- Consider all information and insights garnered from past steps, as they will be your guide in creating an effective communications plan.

- Trust research over personal opinion. It is tempting to assume the marketing tactics that influence you will also work for your priority audience. Remember, your research is your insight into the mind of your audience; you are not the priority audience!

- You may have multiple strategies in your communications plan, but more is not always better. Choosing too few strategies will limit your outreach, while choosing too many will spread your resources too thin.

- There is no set number of tactics for each strategy, but know your limits so that you can have the greatest impact with your communications plan.

- Implementation takes time and resources; make sure you have adequate budget and staff resources to implement your plans.

- Pay attention to detail; the best idea poorly executed will not help you achieve your objectives.

- Plan regular meetings and updates for your team to keep implementation moving smoothly.

Pitfall to Avoid

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 through 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.

"Skip a Week" Example

SWFWMD used a variety of communications channels, strategies, and tactics to reach homeowners with the campaign's messages. Strategies included a combination of media channels to raise awareness and direct outreach channels to help foster social norms and social diffusion.

Example Worksheet #9: Communications Channels - Strategies & Tactics	
Strategies	**Tactics**
Strategy #1: Use paid and organic media to reach homeowners with the "Tom and Stan" creative content.	• TV • Radio • Billboards and bus wraps • Social media (Facebook and Twitter)
Strategy #2: Directly reach homeowners by delivering messages to their homes.	• Direct mail • Utility bill stuffers • E-newsletter
Strategy #3: Garner coverage about the program in local media outlets	• Pitch media and place stories about the program.
Strategy #4: Work with influential figures to spur social diffusion and validate behavior change.	• Southwest Florida Water Management District acted as program spokespeople. • HOA members model behavior of biweekly watering. • Master gardeners and university extension programs share messages.

See Planning Worksheet in Appendix J.

Step 10: Are We There Yet: Creating an Evaluation Plan

Creating an evaluation plan lets you track your social marketing program's progress, celebrate successes, and make necessary changes along the way. It includes measurements of campaign inputs, outputs, outcomes, and overall campaign impact:

- **Inputs** are the resources (budget, staff time, etc.) that you put into a campaign.
- **Outputs** are the reach and engagement of your campaign (people reached, events held, social media engagements, etc.).
- **Outcomes** are what happened as a result. The number of people that changed their behavior or changes in awareness levels or attitudes. Outcomes will typically map back to your campaign's goal and objectives (see Step 1).
- **Impacts** map back to your campaign's purpose (see Step 1).

Having all four elements (inputs, outputs, outcomes, impact) included in your evaluation plan gives you good markers to evaluate progress and allows you to analyze what you might want to change or adjust as your program continues.

Tips

- Create your evaluation plan before starting implementation.
- 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 to Avoid

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. 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 water efficiency, this could mean metering actual water 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, in order to isolate the impact of self-reporting bias.

"Skip a Week" Example

The "Skip a Week" campaign's primary evaluation methodology was a pre- and post-campaign survey conducted with 1,152 homeowners.

Example Worksheet #10: Evaluation Plan			
Evaluation Category	**Item Measured**	**How Measured?**	**Results?**
Inputs (resources that you put into the campaign	Budget and staff time		
Outputs (reach and engagement of your campaign)	Recall of "Skip a Week" campaign Campaign reach Partners engagement	• Pre- and post-campaign survey • Media metrics • HOAs engaged	• 18 percent increase in campaign recall • 8,000 newsletters and 435,000 utility bill inserts distributed • 1,330 HOAs engaged
Outcomes (progress achieving your campaign's objectives)	Adherence to "Skip a Week" irrigation schedule Increase in knowledge about the amount of water required for healthy lawns	Pre- and post-campaign survey (self-reported behavior)	• 19 percent increases in people reporting they water every other week in winter months • Belief that yards need watering every week year-round deceased by 19 percent • Belief that brown grass doesn't always need water increased 23 percent
Impact (progress towards your campaign's purpose)	Reductions in water used	Pre- and post-campaign survey (extrapolated from people who reported they reduced yard watering to every other week)	An estimated 1.2 billion gallons conserved

See Planning Worksheet in Appendix K.

Share Your Success

WaterSense hopes this workbook has given you useful tools to help you plan a water efficiency social marketing campaign in your community. Remember, effective social marketing campaigns require careful planning, creativity, and flexibility. Have fun creating your campaign, be willing to push the envelope, and monitor and adjust as you go. If you are planning a WaterSense campaign or have implemented one already, WaterSense wants to hear from you.

If you want information about becoming a WaterSense partner, contact the WaterSense Helpline:
(866) WTR-SENS (987-7367)
watersense@epa.gov

To learn more about WaterSense, visit **www.epa.gov/watersense**.

(866) WTR-SENS (987-7367) | watersense@epa.gov

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Appendix A: Step 1

Fill in your campaign's purpose, goals, and objectives below. Be sure to revisit them throughout the process.

Worksheet #1: Purpose, Goals, & Objectives	
Purpose:	
Goal:	
Objectives	**How Measured?**
Objective:	
Objective:	
Objective:	

Appendix B: Step 2

Fill in the boxes below with your own research needs and ideas.

Worksheet #2: Defining Your Research Needs	
What information do we need?	**How can we get it?**

Appendix C: Step 3

Use Worksheet #3 to describe your possible desired behaviors.

Worksheet #3: Desired Behavioral Changes				
Desired Behavior	**Impact**	**Probability of Change**	**End-State?**	**Non-Divisible?**
	High Medium Low	High Medium Low	Yes No	Yes No
	High Medium Low	High Medium Low	Yes No	Yes No
	High Medium Low	High Medium Low	Yes No	Yes No

Appendix D: Step 4

List your audiences in Worksheet #4 and categorize each.

Worksheet #4: Audience Brainstorm and Categorization				
Audience	**Primary**	**Influencer**	**Gatekeeper**	**Priority?**

Appendix E: Step 5

Use the following worksheet to outline the priority audience, then use the information to define barriers, benefits, and motivators for the desired behavior.

Worksheet #5: Barriers, Benefits, and Motivators to Desired Behavior Change			
Desired Behavior Change:			
Priority Audience	**Barriers to Behavior Change**	**Benefits for Behavior Change**	**Motivators for Behavior Change**
	Key Barrier: Other Barriers:	**Key Benefits:** Other Benefits:	**Key Motivators:** Other Motivators:

Appendix F: Step 6

Pick the primary tool around which your social marketing campaign will be built. Also pick secondary tools you can use as well.

Worksheet #6: Social Marketing Tools		
	Social Marketing Tool	**Description**
Primary Social Marketing Tool		
Supporting Social Marketing Tool		
Supporting Social Marketing Tool		
Supporting Social Marketing Tool		

Appendix G: Step 7

Fill in the message map below for each of your priority audience.

Worksheet #7: Message Map	
Think	
Feel	
Do	
Main Message	
Support Points	

Appendix H: Step 8

Fill in the boxes to identify partners and use the template on the next page to form an agreement.

Worksheet #8: Partnership Planning Worksheet				
Potential Partner	**Complementary Mission/ Goals**	**Target Audience Overlap?**	**Value Added from Partner**	**Value Added for Partner**

PARTNERSHIP AGREEMENT

BETWEEN	AND

Background:

Partnership Agreement Purpose: The purpose of this agreement is to provide a framework in which _____ and _____ can work together to successfully complete the following:

-

Agreement:

In partnership, [insert organization name], will provide:

-

In partnership, [insert organization name], will provide:

-

Approval Process:

Each organization that is a party to this partner agreement will send any materials with the other organization's logo or that will be posted or distributed to the partnering organization for approval. Each organization will also send any materials promoting the events or campaign to the other organization for approval, within agreed-upon turnaround times.
[add any other approval processes needed for your specific campaign]

Terms of Agreement:

Agreement will be valid for [insert number of months or edit to include end date], from the date of signing below. Amendments to the scope or length of agreement can be arranged in writing between the participating partners at any time.

Agreement:

We, the undersigned, recognizing the value of saving water in our communities by educating consumers about the importance of water-efficient products and behaviors, commit our respective organizations to work together on the [insert program name] as outlined in this document.

Signature:	Signature:
Printed Name:	Printed Name:
Date:	Date:

Appendix I: Step 9

Use the following chart to help map your communications channels.

Worksheet #9: Communications Channels - Strategies & Tactics	
Strategies	**Tactics**

Use the following outline to create a communications plan.

      I.   Purpose, Goals, and Objective
      II.   Research Insights
      III.   Desired Behavioral Changes
      IV.   Priority Audiences
      V.   Message Strategy
      VI.   Social Marketing Tools
      VII.   Partners
      VIII.   Communications
            a.   Channels
            b.   Timeline and Budget
      III.   Evaluation

Appendix J: Step 10

Fill in your campaign objectives and ideas for measuring them in the spaces below.

Worksheet #10: Evaluation Plan			
Evaluation Category	**Item Measured**	**How Measured?**	**Results?**
Inputs (resources that you put into the campaign			
Outputs (reach and engagement of your campaign)			
Outcomes (progress achieving your campaign's objectives)			
Impact (progress towards your campaign's purpose)			