

# From Insight to Action:

Marketing strategies  
for behavior change



We call it the ah-ha moment – that instant you grasp what’s happening and what might spur change. The moment happens after you have applied all you have learned about behavioral science to identify the behavioral forces enabling the competitive behavior. You know how the behavioral determinants are working now. Then, relying on that same knowledge, a hypothesis dawns on you about what influences might encourage the target behavior. Wow. You’re looking at this in a whole new way. That’s when you know you’re ready to plan your intervention.

Social psychology and behavioral economics got you this far. But now you need to employ an entirely new discipline – marketing.

We think about marketing as a commercial exercise. It’s how companies get us to buy stuff. Indeed, the bulk of the academic marketing literature is focused this way – what gets people to part with their money. But the heart of marketing is broader. It’s about designing an exchange. That exchange can apply to any behavior as well as it could to purchasing bananas or iPhones. “Social marketing,” which is distinct from the more tactical social media marketing, is about how you more broadly apply marketing concepts to achieve positive social change. The practice is sometimes also called “behavior change marketing.” Regardless of what you call it, the overarching theory is the same: The interventions that get you to *buy* stuff can also get you to *do* stuff.

Note that at this point, we are talking about interventions – the stuff we, as the marketers, are doing to influence what they, the target actors, are doing. These are all techniques you apply after the ah-ha moment. Rushing to tactics – to start here, rather than first analyzing the behavior – is the single most common mistake people make when trying to influence behavior. The tactics only work if you’re focusing on the right thing – the hypothesis born out of that ah-ha moment. We call that hypothesis your “Big Idea.” So, before we jump into marketing techniques, we want to share where this fits in the overall campaign design process:



As you can see from the diagram above, there are four categories of interventions you can consider once you have your Big Idea. These “four P’s” – price, place, product and promotion – are just as critical in social marketing as commercial marketing, although the application of these are different. Basically, any sort of tactic you might try – from branding to sampling to badging – falls under one of more or these categories. Think of it as a series of questions you can ask yourself once you have your Big Idea:

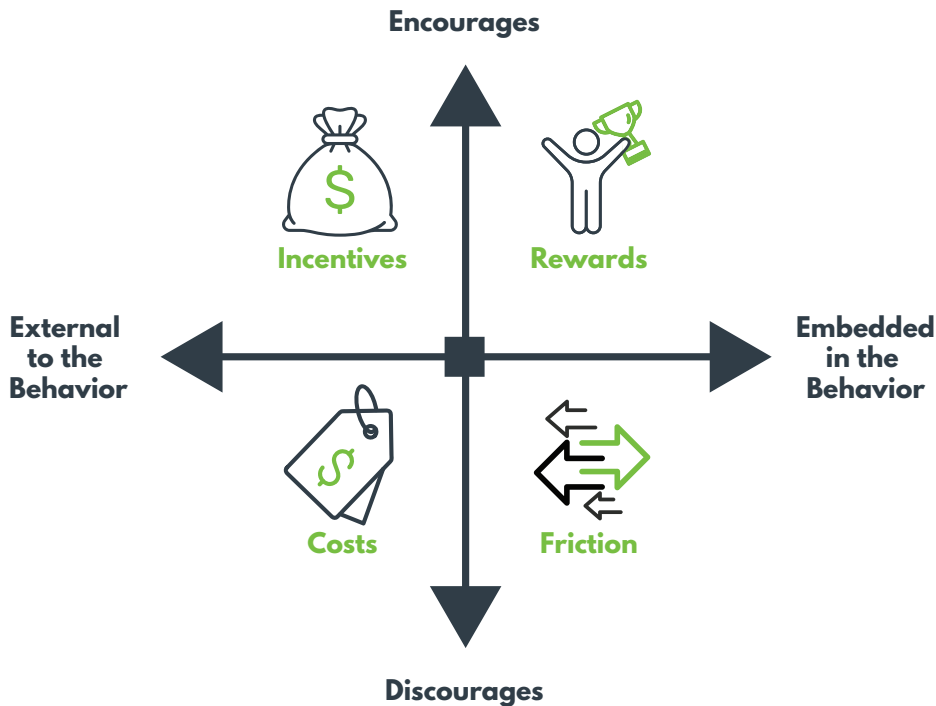
- ❑ Should I lower the **PRICE**? This is about considering tactics that are likely to make your target behavior easier, more convenient or cheaper to do.
- ❑ Should I change the **PLACE** where the behavior or some precursor activity to the behavior takes place? In commercial marketing, this is about whether you put your product in a supermarket or department store, in the vegetable section or by the cash register. In social marketing, this is typically about where the target actor is triggered to do the behavior or where we change the environment to make the behavior easier to do.
- ❑ Should I build a **PRODUCT** that helps people do the behavior or makes it more fun? This could be everything from a smartphone application to an event to a simpler application form. Years ago, one barrier to getting children insured was that the applications needed to be downloaded and printed on legal size paper. Just moving to letter sized paper applications allowed more people to apply.
- ❑ Should I consider a **PROMOTION** to build awareness of an unrecognized benefit of the behavior, tell people about one of the changes above or reposition the behavior relative to the competitive behaviors? Note that promotion requires you to share something **NEW** with your target actors. Just telling them what they already know, even in an extremely entertaining or powerful way, is unlikely to have an impact.

So you begin designing your marketing plan by deciding your **marketing strategy**. At the most basic level, your marketing strategy is simply one or more of the four Ps above with enough specifics to show why that makes sense for your behavioral goal. Your marketing strategy speaks to how you plan to carry out your Big Idea. Note that it may or may not involve communication because marketing is bigger than just communication. It’s about changing the dynamics of the basic exchange (if you do X, you get Y). Everything else is tactics.

Tactics are the ways you can carry out your strategy. These are endless, and new ones are invented all the time. Maybe you can recall the days before social media. All tactics, however, even those that haven’t been invented yet, fall under these four Ps. And if you don’t have the right Big Idea leading to the right strategy, it really doesn’t matter what your tactics are. They won’t have an impact.

That said, execution matters. How you carry out your strategy also determines if you succeed. So below, we consider how each strategy works and the common tactics people use to carry them out. We will start with price, then move to place, product and finally promotion because that is the order in which you should consider them. People often rush to promotion first. But often the most powerful marketing interventions come under the other three Ps.

## PRICE



What do we really mean by price? In the context of changing behavior, we're looking at the four factors shown above – costs, friction, incentives and rewards. Some of these – incentives and costs – are external to the behavior. They are add-ons and can be changed without any impact on the behavior itself. Others – rewards and friction – are embedded in the behavior. They occur as part of the behavior, so adjusting those means altering something about the behavior.

**Rewards** are the good things that happen as a result of the behavior. For example, if you do pushups every day, you'll get stronger. BJ Fogg, who founded the Behavior Design Lab at Stanford University, writes in his book *Tiny Habits* about one type of reward – “shine,” that feeling of accomplishment you get after doing the right thing. Fogg contends that this is a reward we can adjust as a way to further encourage the behavior. For example, you can say out loud to yourself, “Good job. You did it!” every time you floss or jog a mile. That small “celebration,” as Fogg describes the technique, produces a chemical reaction in your brain that makes you recall the activity more positively and more likely to repeat. By redesigning the behavior, you changed the value proposition. Like a two-for-one sale, you've adjusted the price. Some other examples of rewards are:

- Respect
- Immediate, reliable and related compensation
- Fulfilling a personal commitment

**Friction** describes the annoyances or bad things that happen when you do a behavior. They are the things that make it hard or unpleasant to do. For example, when you exercise, you can get sweaty and smelly, which would be a point of friction if you don't

have time to shower before the first date you have planned afterward. These are realities we do not believe we can avoid experiencing if we do a behavior, but sometimes they are more avoidable than people realize. Maybe there is a way to exercise that won't make your knees hurt. Maybe if we change the environment around someone, some of the unpleasantness will disappear. Some common examples of friction are:

- Effort required or distance to travel to do something
- Physical discomfort
- Psychological costs of doing it (e.g., how you look)
- Negative feedback in the moment
- Time required
- Poor design
- Regret (can be related to cost)

**Incentives** are good things people get if they do the behavior, but they are not a natural result of the behavior. They are inducements we add to encourage people to do something. For that reason, they're less sustainable and powerful than rewards. If you stop adding the incentive, the behavior actually is less pleasing to do. You get less out of it. So you would expect a drop off in the number of people doing it. What's more, it's not really connected to the behavior so maybe people could find other ways to get that incentive that are easier to do. Some examples of incentives are:

- Monetary reward not directly connected to behavior
- Prize or chance to win a prize
- Badge or award
- SWAG (stuff we all get), free products
- Honoring an external pledge

**Costs** are what typically come to mind when you think about price. But they are not simply monetary. They are whatever you need to give up in exchange for doing the behavior. Some examples of cost are:

- What one must pay to do it / get it
- Cost compared to competition
- Training or equipment necessary
- Licensing or registration necessary
- Negative feedback expected
- Perception of time required

The bottom line for price is devising ways to ask less of the actors in exchange for them doing the behavior.

## PLACE

### Point of Service/Venue

## WHERE



The Smilemobile

### Distribution/Positioning

## HOW



Floss at gyms and beauty salons

### Timing/Schedule

## WHEN



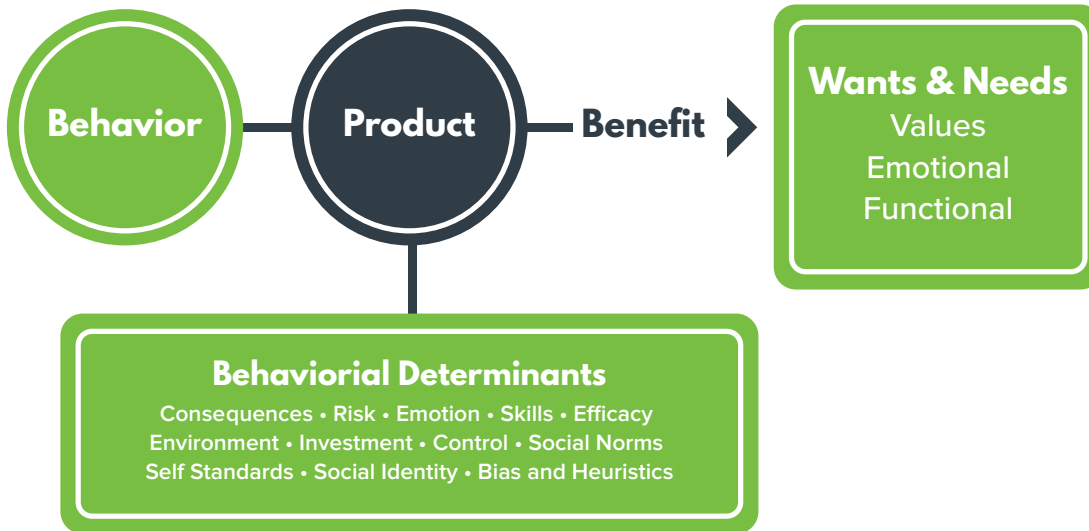
Teeth week

A lot depends on where you do a behavior. If you ask people without their own car (or even those with cars) to get regular check-ups at a clinic, that clinic better be close by or at least accessible through public transportation. People can only do what's under their control, and they'll be more likely to do what's convenient. So you have to think to yourself: How easy is this behavior to do in the place we expect it to happen?

This shows up in three ways:

- The most obvious is the **point of service** for an offering or the **venue** where we are asking people to do a behavior. One simple intervention is to bring the service to your target actors, as the Arcora Foundation does in Washington state with their "Smilemobile," a converted motor coach that provides dental services.
- Sometimes your behavior depends on a product where the **distribution** of that product affects its use. Think, for example, of condoms placed in college dorms – the closer you are to time and place the behavior will be triggered the better off you are. Where something is available can also alter the behavior's positioning. In one example, the Arcora Foundation placed floss in gyms and beauty salons to position flossing as a health and beauty hygienic behavior and not just something your dentist nags you about.
- Just as important as where is when – the **timing** of an offer. One last example from the Arcora Foundation. Working with many partners, the foundation produced "Teeth Week" in Spokane – a single-week promotional push in which people could get dental check-ups after-hours and in places they would be anyway. If you give people an opportunity to work the behavior into their normal routine, you will be more successful.

## PRODUCT



In social marketing, a product is anything that meets the wants and needs of the target actors in a way that has an impact on a behavioral determinant. It's another means of sweetening the exchange – a product makes your target behavior easier or more attractive.

The product could be the behavior itself if you have the ability to redesign that behavior. You want that behavior – like any product – to be as attractive, useful and powerful as possible. For example, consider impaired driving. I could ask you not to drink and drive, or I could suggest you have a designated driver. Which ask feels more specific and doable? The social impact goal is the same (fewer crashes). One just better fits the actors' need-states. Designated driver is simply a better designed behavior. So is “stop, drop and roll.” **Designing your behavior** can be a game changer. Asks that are too vague can become more actionable. Demands for willpower can be transformed into invitations for new rewards. Purely negative messaging (“Don't do X”) can be made positive.

Case in point: The truth anti-tobacco campaign aimed at teens. The campaign didn't catch fire with teens in the late 1990s by preaching against the act of smoking. The anti-smoking effort never even explicitly asked teens not to smoke. Instead, campaign leaders redesigned their target behavior – asking teens to rebel against the tobacco industry. That boosted its social impact (fewer teens smoking).

If your good cause is similar to most others, you probably have a suite of actions you are asking people to take. Many are likely less than inviting. Some may be downright unpleasant. Others may feel unimportant or out of reach. You may want to reduce a risk the target audience does not truly appreciate. Treating your target behaviors like products simply means recognizing you can leverage what people already want rather than selling them what they view as unimportant.

How do you “design” a behavior? You can begin by breaking down how a target behavior achieves an intended social impact. This will give you room to explore alternatives or

specific versions of a behavior that can be ranked and mapped to audience need-states. You can journey-map the behavior, starting from its trigger and going through its immediate impact. You can generate new, perhaps smaller actions that inch people toward a target behavior or collectively are the behavior. The trick is applying product design principles to something many campaigns never think twice about – what specifically people need to do.

You might also want to build a product that encourages your behavior. It's not the behavior itself, but it makes the behavior easier or more fun. For example, the Horizon Foundation in Maryland created a Better Beverage Finder, which helped parents sort through hundreds of alternative drink choices with lower amounts of sugar. Later, they added a "Switch the Drink" feature that allowed users to type in their favorite sugary beverage and get a similar, more healthy alternative. In Pinellas County, the health department developed a Find the Fun application that helped residents find "active fun" based on who they were with, how much time they had and their location.

One effective process for developing products is called "**rapid prototyping**," originally developed by Google Ventures, which can be done in five days. You spend time in a series of ideation and design activities, then produce a prototype for testing. That prototype is then tested with consumers. Only then is the design considered for development.

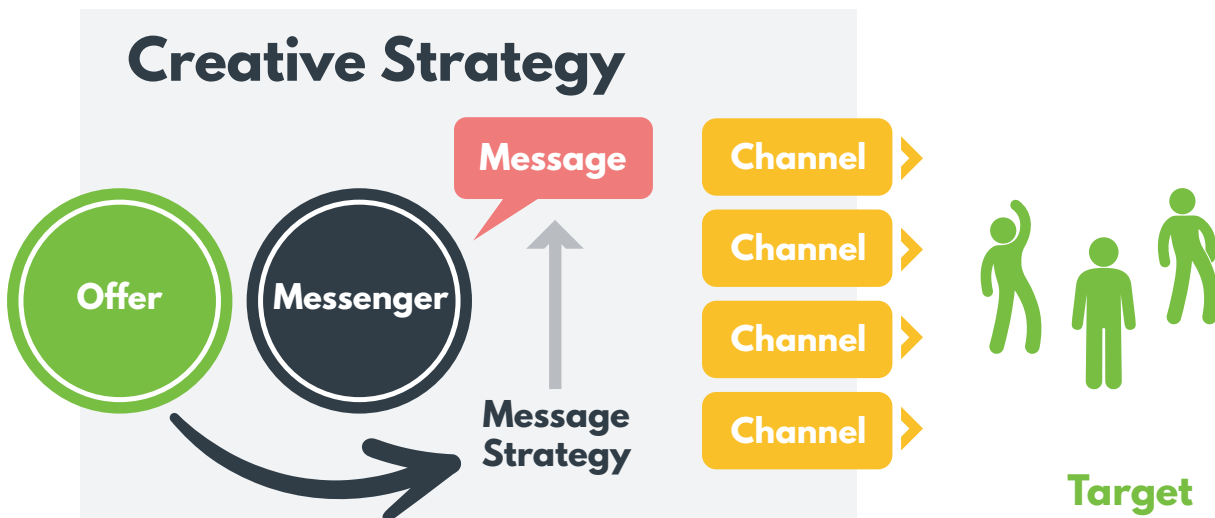
Five questions should guide your journey into considering a product strategy.

- Can you redesign the behavior to make it easier or more attractive?
- Can the behavior be captured as a product – if people use the product they will do the behavior?
- Is there an existing product that helps people do the behavior? You just need to promote it or improve on that product. (Examples: condoms and floss).
- Can we create a new product that makes the behavior easier to do?
- Can we create a new product that makes the behavior feel better or more rewarding?

If the answer to any of these questions is yes, one strategy to consider is to do the redesign or create the product, then promote the change. If you're going to use promotion, you need to be sharing something new and you may need to create it.



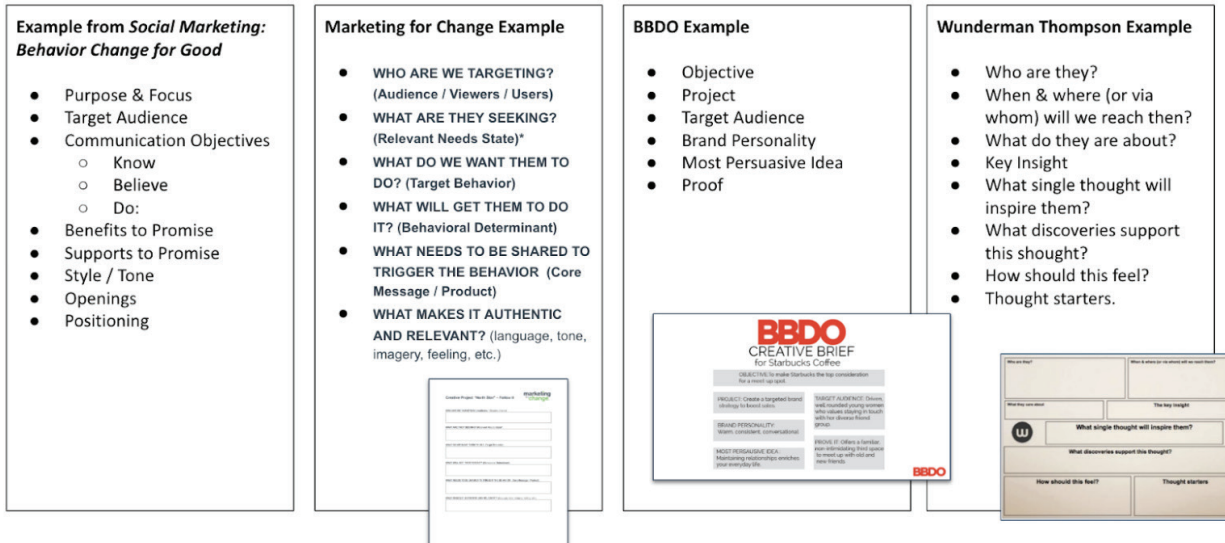
## PROMOTION



Marketers use promotion tactics to reach an audience with a message — something designed to change their beliefs and attitudes so they alter their behavior. A lot of factors determine if a promotional effort is successful, but the main elements you want to consider are:

- What your promotional effort has to **offer** your target audience. That is, boiling everything down to that exchange – if you do X, you get Y. It may not be explicit, but an offer is always implicit to every promotional appeal.
- The **message** you want to get across. This goes to how you package your offer. To craft an effective message, you'll need to consider framing, context, tone, clarity and what's the explicit or implicit call to action.
- The **messenger** – both who is delivering and behind the message – communicates something about the offer, and can be a powerful factor in whether the message is noticed, remembered or influential.
- The **channel** you used to reach your target actors, covering everything from TV to social media to word of mouth. The channel not only helps determine who you reach, but in what impact your message can have. For example, billboards are generally used as reinforcement mediums (reinforcing a message people have seen elsewhere) and are rarely, if ever, the right channel for persuasion.
- Finally, and perhaps most importantly, you need to consider **exposure** – that is the level of reach, frequency and engagement your message achieves. Audiences must see messages multiple times to have an impact. How many? That's a matter of debate. But think about the messages you can recall right now. You probably saw those many, many times.

Promotional efforts are the product of a common process that begins with sharing the research insights and overall strategy with a team of people. Many nonprofits, corporations and ad agencies do this through a **creative brief**, a short document that quickly lays out the assignment and key information anyone writing messages or producing advertising will need to know. Below are some examples of what kind of information is typically included.



From there, the steps are:

- **Ideation / Concepting** - This is when you put together the overall themes and messages for your campaign. You may put together different sets of concepts and then test those with the audience before moving forward.
- **Writing / Designing** - People with a talent for copywriting, design, video and other forms of expression then put together the actual materials or plans necessary to convey the message.
- **Testing** - Promotional efforts can be tested with the audience at the concept level or as individual executions depending on the maturity of the campaign and budget. Even if you cannot do formal testing, it's probably worth it to share some of your work with members of the audience to get their feedback.
- **Production** - Whatever you decide to include will need to be produced at a level suitable for the medium.
- **Planning and Placement** - As the creative is being developed, you also need to plan for how you will get the necessary exposure – which channels you will use for how long, how much you will invest in each channel and so on. This plan will then need to be executed by negotiating with the vendors or other professionals.
- **Exposure and Monitoring** - Once you launch your campaign you should monitor the level of exposure and impact to the degree you can.
- **Evaluation and Optimization** - Ideally, you want to use a Logic Model – a step-by-step description of how you expect the campaign to work – to measure your level of success at achieving awareness and changes in beliefs, attitudes, intent and behavior.

Of course, this is an extremely high-level discussion of what's involved in executing all four Ps, but the goal is to give you enough guidance to understand the basics. This should be the beginning of your understanding of marketing, not the end.



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