

# Marketing for Action

A Guide to Marketing Fundamentals for Urban Sustainability Offices

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**USDN**

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## FUNDED BY

Urban Sustainability Directors  
Network Innovation Fund

## AUTHOR

Roya Kazemi, *Vision Flourish*

## PROJECT MANAGERS

Dan Guilbeault, *Washington D.C.*  
McKenzie Jones, *City of Flagstaff*  
Lindsay Ex, *City of Fort Collins*

## CREATIVE DIRECTOR

Javier Inductivo, *Spectacle Seeds*

## CONTRIBUTORS

McKenzie Jones, Dylan Lenzen - *City of Flagstaff*  
Jo Zientek, Jennie Loft, Kate Ziemba - *City of San Jose*  
Lindsay Ex, Emily Wilmsen - *City of Fort Collins*  
Kristin Baja, Anne Draddy - *City of Baltimore*  
Pat Babbitt - *City of Tacoma*  
Dan Guilbeault, Kate Judson, Danielle Nkojo,  
Allison Paisener, Nina Liggett - *Washington D.C.*

## ACKNOWLEDGEMENTS

Susanna Sutherland, Mia Arter, Natalie Narotzky,  
Garrett Fitzgerald, Nils Moe, Sheda Morshed,  
Shivika Sahdev, Charlie Jones, Annie Lee & Erika Lindsey

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# Introduction

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*Marketing for Action* lays out the marketing fundamentals that any sustainability office can use to create and shape a strong behavior change campaign. It plots a course for city sustainability teams to apply modern best practice marketing techniques to the objective of improving the environmental behaviors of its residents. Voluntary action is among the very best tools for effecting environmental change but it needs to be cultivated in order for best intentions to be translated into actual practice and to achieve a quantifiable impact. This guidebook offers a practical how-to for cities seeking to engage their residents by offering action-oriented strategies that influence and support residents' daily choices toward the direction of urban sustainability.

Engaging residents directly is both impactful and cost-effective. **New York City found, for example, that they could achieve a 7.5% reduction in citywide greenhouse gas emissions through just 10 behavior change campaigns.** Once achieved, gains in behavior change are generally lasting. The 2015 Mayor's Office Survey of New Yorkers on Environmental Attitudes and Behavior found that 47% of respondents felt that ordinary residents have the potential to help improve the overall quality of the environment.<sup>1</sup>

This guidebook represents nearly a decade of work and serves as a reference manual for city sustainability departments seeking to create impactful behavior change campaigns. It has been developed leveraging the experience of a seasoned marketing professional responsible for developing and implementing the City of New York's successful behavior change program, *GreeNYC*<sup>\*</sup>, and experiences and feedback from members of six remarkable American cities: Flagstaff, Fort Collins, San Jose, Tacoma, Baltimore, and Washington D.C. The guidebook offers knowledge, experience, and resources to assist you with your marketing goals, including branding strategy, messaging, execution, monitoring, and evaluation to advance your sustainability agenda.

Marketing is a \$200 billion per year domestic industry and there is a wealth of marketing tools and strategies available right now to city sustainability offices. This guidebook covers the marketing basics most applicable to the task of altering the arc of urban behavior and bends these tools and lessons toward environmental sustainability through easily implemented, cost-effective, and action-oriented approaches. The framework provided applies to behavior change campaigns across all sustainability sectors, including energy, solid waste, water quality and conservation, and air quality."

The strategies in this guidebook have been thoroughly tried and tested in New York City and across a range of *Urban Sustainability Directors Network (USDN)* cities. Each section of this guidebook was developed based on feedback from over 50 USDN members, and the guidebook's design was influenced by ongoing dialogue between Vision Flourish and representatives from Flagstaff, Fort Collins, San Jose, Tacoma, Baltimore and Washington D.C. The insights gained through phone interviews, online surveys and at a two-day, in-person *Marketing for Action* workshop have been invaluable in the development of this guidebook.

Inside you will find practical tips, real-world examples of how other cities have used various media channels, implementation strategies for different budgets, tools for identifying audiences, and much more. *Marketing for Action* presents a comprehensive approach to data-driven strategic marketing as the most efficacious path to behavior change.

***\*Italic and color-coded*** terms throughout the guidebook indicate words or phrases that are defined and linked to the *Glossary*.



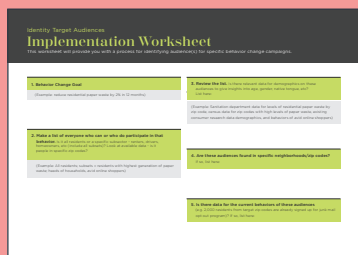
# Using the Guidebook

You can use *Marketing for Action* to help develop and measure a comprehensive behavior change campaign from start to finish. Or, use the *Quick Guide* to jump straight to the most relevant section to you – for instance, if you have already developed a brand and identified a target behavior for change, but need more guidance on identifying and prioritizing the campaign’s audiences, you would flip to *Identify Target Audiences*. The Quick Guide is intended to summarize the process of developing a campaign, and briefly describe the tools and resources needed to launch a successful campaign.

Appreciating that some sustainability offices may lack the resources to hire a marketing agency or experienced marketing staff, this guidebook is designed to be a tool for any staff member in the office working on a public-facing marketing campaign using any available budget.

To that end, at the conclusion of each main section, you will find the following tools:

- Implementation Worksheet - provides guided planning for practical application of section focus
- Budget Table - implementation strategies for no, low and optimal budgets
- Additional Resources - a description and list of where to read more about topics covered



Implementation Worksheet



Budget Table

**Good data are crucial to every component of a strong marketing campaign. Each step detailed in this report is data-driven: setting goals, identifying target audiences, developing messages, placing ads across media platforms (e.g., radio, billboards, Facebook), and monitoring and evaluating a campaign’s effectiveness.** Having the right data ensures better outcomes, an efficient use of resources, impact measurability, and the ability to design more successful campaigns in the future, or seek out grant funding and cooperative partnerships. How and when to apply hard data—and where to find it—is discussed in each section of this guidebook, covering every phase of campaign planning and implementation.





# Quick Guide



This quick guide is tailored for local governments running *environmental behavior change* campaigns. It is intended to summarize the process of developing a campaign, and briefly describe the tools and resources needed to launch a successful campaign.

Each section of this guidebook includes an overview of specific marketing campaign components, illustrated with several examples to walk you through the implementation process, along with some helpful templates. Because local governments are working with different capacities and budgets, each section also contains implementation options for various budget sizes. An Additional Resources section is located at the end of each section. Bolded terms indicate words or phrases that are defined in the *Glossary*.

## THIS GUIDE WILL HELP YOU TO:

- Understand the type of data needed for a successful behavior change campaign, and where you can locate the information;
- Identify and prioritize your behavior change campaigns according to their environmental impact;
- Identify and target specific audiences for your campaign;
- Create clear messaging and crisp design to effectively engage your audience;
- Understand how to develop a strong brand strategy;
- Determine which media channels make the most sense for connecting with your audiences; and
- Create a comprehensive marketing plan; and identify indicators to monitor and measure the success of your campaigns.

This guide serves as a quick reference for those cities looking for a brief overview of the main components of a marketing plan, or those in need of specific tools from the plan.

## 1 / DETERMINE TARGET BEHAVIORS

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This section presents a framework for identifying target behaviors based on delivering the most appropriate environmental outcomes that are also likely to have the greatest impact. Before developing your environmental behavior change campaign, you must first select the specific behavior changes you hope to modify and make the focus of your campaign.

Target actions could come from your city's existing set of urgent priorities they already intend to target, from work done on climate action plans, or to address a specific policy gap. Once identified, select the action that has the highest potential for engagement with the maximum impact, especially in the areas of energy conservation, transportation, water and air quality, cross referenced by potential resident impact. Given that there are literally hundreds of actions to choose from, it is important to identify a campaign focus with the highest potential impact.

› *Determine Target Behaviors Implementation Worksheet*

› *Determine Target Behaviors Implementation by Budget*

## 2 / IDENTIFY TARGET AUDIENCES

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To have the biggest impact with a marketing campaign and be strategic with limited resources, cities must develop an approach for identifying target audiences that are most relevant to the campaign. Identify your target audience by determining which populations is appropriate to, and capable of, participating in your desired behavioral change. Conduct an assessment of people already participating in the desired behavior change action, or who may be likely to participate in the campaign, to better understand their demographics, attitudes and behaviors.

Data-driven research is key to this step. Start by gathering and *surveying* whatever existing data sets are already in city hands: homeowner information from a city planning department; transit information from a transportation bureau; waste stream data from sanitation; and so on. Then identify your data gaps, if any, tie to any other overlapping geographical and demographic data you might have available, and fine tune your campaign targets. This section also discusses how to prioritize potential audiences for the campaign for reaching those groups most likely to engage.

› ***Identify Target Audiences Implementation Worksheet***

› ***Identify Target Audiences Implementation by Budget***

### 3 / CRAFT MESSAGING & CAMPAIGN DESIGN

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It is important that the messaging for the campaign be based on what would motivate residents. However, because motivations are not universal, conducting audience research can help identify target audiences and develop the messaging that is most likely to resonate. This includes using approaches like *calls-to-action (CTAs)*, suggesting acts that your audience can take immediately, speaking to audience's motivations or barriers, and testing multiple messages. In addition, visuals that accompany the messaging should be clean, positive, and make it easier for residents to engage with the advertisement.

Identify your target audience—their behaviors, attitudes, and motivations—and then review your existing inventory of city messaging materials saved from past campaigns, looking for opportunities to harmonize with or replicate as you develop several behavior change messages. Bear in mind language accessibility issues, as in some cases ads may need to be translated based on resident demographics. Keep it light and positive: research shows

people respond poorly to too much information, or messaging rooted in guilt, fear, or shame.<sup>3</sup>

› ***Craft Messaging & Campaign Design Implementation Worksheet***

› ***Craft Messaging & Campaign Design Implementation by Budget***

### 4 / BUILD TRUST BY BUILDING YOUR BRAND

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A *brand* expresses the values and personality of your program, and represents the commitment you make to local residents about what your behavior change program aims to achieve in the city. Building a brand requires a clear set of values, strategy, and consistency. Use your brand to define who you really are or the market may come to its own wrong conclusions. Try to encapsulate your organization's mission and vision for the future, your philosophy and values, your distinctiveness, and the feelings you wish to inspire in residents when they see your brand.

Begin by understanding the audiences you wish to engage, and what they value—constituents ranging from local residents and businesses to governmental peers and even potential funders. Consider developing a *logo*, one or more taglines and, in particular, determine what emotional response you want to elicit from your audience, since people make decisions every day based on how something they see makes them feel. All your branding components should be consistent, reinforcing, and cohesive.

› ***Build Trust By Building Your Brand Implementation Worksheet***

› ***Build Trust By Building Your Brand Implementation by Budget***

## 5 / MARKETING TOOLS:

### Media Planning and Beyond

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Where, when, and how often people engage with the campaign requires thoughtful planning in order to truly market for action. Various tools are available to connect with your target audience.

The three major types of media channels are discussed: *owned media*, *earned media*, and *paid media*.

Owned media includes ad space on the sides of city-owned vehicles; utility bill inserts; websites, newsletters and email templates; *social media* accounts; and city signage on bus shelters, around trash cans, in subway stations, and elsewhere.

Earned media refers to press coverage of a city program announcement, event, and publicity-worthy achievement, but can also include creative and fun social media strategies to engage online audiences.

Paid media includes print and digital paid advertising via Google and/or any of the social media platforms. The particulars of television, radio, and printed publication ad buys are discussed along with “out of home” ad spaces, including third-party bus shelter ads. In addition, smart and well executed giveaways, tabling appearances at relevant events, and the use of prompts can all create buzz while directly enabling the target behavior change. Issues related to timing and coordination with other campaign elements are also discussed.

› ***Marketing Plan Worksheet***

› ***Media Plan Budget Worksheet***

› ***Marketing Tools Implementation by Budget***

## 6 / ANALYZE CAMPAIGN EFFECTIVENESS

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Tracking a campaign while it is running helps cities understand performance and allows for course correction if necessary. Campaigns should be monitored closely while in process by collecting data to measure performance, allowing managers to track how residents engage with the various media channels, testing the strength of various messaging strategies though *A/B testing*, and other tactics, so that adjustments can be made mid-stream to maximize reach and effectiveness. Digital ads, for example, can be adjusted almost immediately while billboards are locked into a contract period.

During the design and media-planning phases, determine the metrics most applicable to monitoring your campaign, such as *click-through rates*, engagement for digital ad buys, website analytics, participation statistics (sign-up sheets, pledges, surveys, call-to-action indicators) collected at campaign events, or media impressions. Hard data can help you learn lessons about what went wrong or can help to propel fundraising efforts when things go right.

After the campaign is over, make sure to conduct a thorough evaluation of how residents engaged with the media and the behavior change impact can inform future campaigns. Evaluate your campaign’s environmental impacts and how well you met the environmental behavior change goals determined at the outset. Metrics can be developed in terms of tons of recycled materials diverted from the waste stream, reductions in GHG emissions, or increases in bicycle ridership, and measured against the quantifiable campaign goals and methodology you established during the campaign’s genesis.

› ***Analyze Campaign Effectiveness Implementation Worksheet***

› ***Analyze Campaign Effectiveness Implementation by Budget***



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Set the  
Right Goals

## SET THE RIGHT GOALS

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**Every successful behavior change campaign requires a set of clear, feasible campaign goals.** Goals are necessary to ensure that efforts stay focused. Goal setting at the campaign's outset will help ground its other components, since they will all be developed with the intention of meeting the specified goal. Having specific, testable goals produces strong evaluation tools.

In order for your goals to be effective they should be as detailed as possible. A goal that is too general in its conception can prove difficult to reliably measure later. Consider, for example, a goal like Reduce Solid Waste. Reducing solid waste is a well-intended goal, but it is vague in terms of making a measurable impact to your city's *triple bottom line*. What kind of waste: residential, industrial, or commercial? Reduce by how much? Over what period of time? Is this a citywide initiative or to be aimed at a number of specific neighborhoods?

### IT'S STILL SMART TO BE SMART

For some it may be helpful to review the S.M.A.R.T. goals formula. It reminds us that our objectives should be Specific and Measurable, for the reasons discussed above.<sup>4</sup>

The remaining strategies remind us to set Achievable goals, evaluated in the full context of what resources and funding are available to you. Considering your goal's feasibility is an obvious but important step. *'Engaging all residents to conduct a home energy audit'* is a wholly unrealistic goal, both from a marketing resources standpoint and in terms of the likelihood of uptake by target audiences.

Your goals, therefore, must be quantifiable. The surest path to defining quantifiable goals is to start with your existing data so as to establish a *baseline*. After all, how will you know whether residential waste has

been reduced if you do not know what the current levels are and what mechanisms you have for measuring changes? Goals can be quantified any way that makes sense for a given project or campaign. It could be the number of residents participating in a bike share program, a one percent increase in textile recycling, a decrease in bottled water consumption by sales, or the number of newly installed low-flow showerheads. Select the most quantifiable indicator of environmental progress that works best for your campaign.

Finally, be sure to keep your goals Results-focused and Time-bound by establishing deadlines to elicit a sense of urgency about meeting those goals. To be meaningful, goals should always have a deadline. This does not mean the campaign has to end, but providing a timeframe ensures that a goal can be met and measured by keeping up the momentum of a campaign, and providing markers for monitoring and adjusting campaigns along the way.

An example of a goal that incorporates all of the elements listed above would be to *'reduce residential paper waste by 2% within 12 months.'* Through each section of this guidebook, with each additional tool acquired, further refine your campaign goal to make it specific, measurable, achievable, results-focused, and time-bound. The SMART acronym may be overused, but the concepts are still sound for developing the strategic goal parameters needed to drive your campaign's ultimate success.



# Determine Target Behaviors



## DETERMINE TARGET BEHAVIORS

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Before you can begin to develop your behavior change campaign, you must first identify the specific behavior(s) you hope to market for action - that will become the focus of your campaign. If your team already has a working list of target behaviors around which to develop strategic marketing campaigns, you may wish to skip this part of the guidebook and proceed directly to *Identify Target Audiences*. This section presents a framework for identifying target behaviors based on delivering the greatest environmental outcomes.

Every city has its own set of urgent priorities, from addressing water shortages to curbing illegal dumping. Your municipal government may already have in mind the behaviors they intend to target, which are connected to a specific known problem in need of addressing. Some city governments have identified behavior change goals in the course of developing their climate action and sustainability plans, or as part of other political priorities. Or perhaps there exists a specific gap in policy or public practice, such as a lack of resident engagement with city infrastructure to collect composting (i.e., residents continue to discard their food scraps together with the trash). The following is a look at some methods for selecting and ranking potential behavior change campaigns according to their environmental impact.

### FINDING YOUR RIGHT FIT

There are literally hundreds of potential actions residents can take to help a city meet its sustainability goals. Simple actions like adjusting the thermostat down during winter and changing dishwasher settings can add up to significant energy and water savings. Encouraging more biking over driving and drinking tap water from reusable bottles instead of purchasing disposable plastic bottles can make a city more sustainable while improving the quality of life for residents.

City sustainability offices often have limited resources for public engagement. So, too, the public often has limited attention to give to marketing campaigns of any kind, either public interest or commercial. Accordingly, it is important to make sure that the campaigns being planned and launched are the ones with the highest potential for engagement and maximum impact.

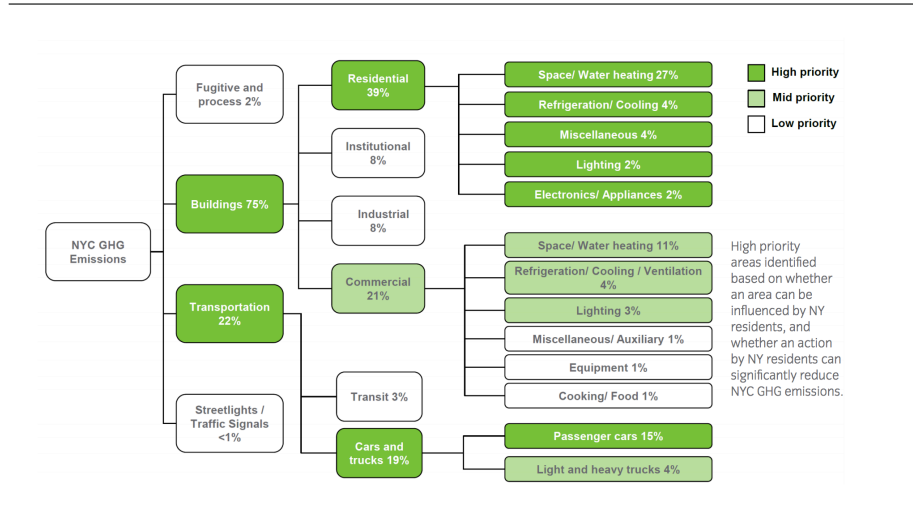
### CASE STUDY: GREENHOUSE GAS EMISSIONS

**The first step is to look at your citywide sustainability goals and determine where resident behaviors can play a role.** When planning for their behavior change program, GreeNYC, the New York City sustainability team, worked with consultants to develop a sophisticated approach for identifying the best target actions. As we go through the steps of an environmental impact analysis, we will look to New York City's experience for guidance and insights. The full report, *New Yorkers Contributions to a Greener, Greater City: A Behavioral Impact Study*, is available as a PDF [here](#).<sup>5</sup>

One goal common to all cities is achieving reductions in total greenhouse gas (*GHG*) emissions. A close examination of the data surrounding what is driving emissions in your city will help determine which residents can play what kinds of roles to help lower emissions. As an example, see the breakdown of GHG emissions from New York City on the following page. Figure 1 illustrates in a flow chart where New York City traced its GHG emissions, with the higher priority actionable items for residents in a darker shade of green. New York found that emissions stem mainly from buildings (75%) and transportation (22%). Armed with this information, the city moved forward confidently with a plan that targeted those categories where residents can have the greatest impact.



FIGURE 1.  
Breakdown of NYC Carbon Emissions



Take a moment to think about your own sustainability goals and where resident behavior change can best play a role in meeting them. The more specific you can be the better. Look at all the available data to determine sustainability sectors with the highest potential for return, especially in the areas of energy consumption, transportation use, water quality, and air quality. Now look at the source categories within each of those sectors to find the intersections with residential behaviors, such as those governing household appliances, lighting fixtures, and HVAC systems, and their associated GHG emissions.

**Once your sectors have been identified and a list of target categories is generated,** make a list of actions for each category that residents can take to reduce their impact. For example, if your sector focus is solid waste and your category focuses within waste include food scraps, paper waste, textiles, and metal/glass/plastics, you should make a list of actions for each category. A sampling of possible outputs from this process is provided in Figure 2.

FIGURE 2.  
Focusing Sustainability Goals on Resident Actions

Sustainability Sector	Sub-Sector	Category	Resident Action
Energy	Commercial	Food Scraps	<ul style="list-style-type: none"> <li>Compost</li> <li>Store food properly</li> <li>Shop better</li> <li>Donate</li> <li>Expiration/sell-by dates are guides</li> </ul>
Solid Waste	Residential	Paper	<ul style="list-style-type: none"> <li>Opt out of unwanted catalogs/other mail</li> <li>Recycle paper</li> <li>Buy items with less packaging</li> <li>Pay bills online</li> </ul>
Transportation	Industrial	Textiles	<ul style="list-style-type: none"> <li>Donate used clothes</li> <li>Drop off unusable clothes at textile recycling location</li> <li>Buy clothes that last</li> <li>Shop at secondhand store</li> </ul>
Water	Public Sector	Metal, Glass, Plastics	<ul style="list-style-type: none"> <li>Use reusable water bottles and shopping bags</li> <li>Recycle</li> <li>Buy in bulk</li> </ul>

Once you have a list of actions across all of your target sectors, your next step is to identify those actions that will have the biggest impact. This determination is based on quantifying the reduction potential (i.e., GHG, tonnage of waste, gallons of water) for each action along with behavioral information. How many people are already participating in this action? For those not participating, what would motivate them to pitch in?

› **For a summary of key takeaways from this section, please refer to the [Quick Guide](#).**

## Determine Target Behaviors

# Implementation Worksheet

This template provides guidance for identifying target behaviors for your city to prioritize for marketing campaigns. Gather data related to these goals. Look at all the available data to determine sustainability sectors with the highest potential for return in your high-priority areas (energy consumption, energy supply, transportation use, water quality, and air quality, etc.). Now look at the categories within each of these sectors to find the intersections with residential behaviors, such as those governing household appliances, lighting fixtures, and HVAC systems, and their associated GHG emissions.

### 1. List the high priority sustainability sectors for your city

(e.g. Transportation, Solid Waste, Energy Supply, Energy Consumption, Water Quality, Water Conservation):

#### High Priority Sustainability Sectors

(ranked in order of importance)

1.

2.

3.

4.

5.

### 2. Now for each high priority sector, identify the relevant sub-sectors associated with it

(see example below):

#### Sector

Example:  
Solid Waste

#### Sub-Sector

Sub-sectors Example: Residential Waste, Commercial Waste, Industrial Waste, Institutional Waste

# Implementation Worksheet (cont.)

**3. Identify the sub-sector(s) that can be impacted by residents as the target sub-sector and break down by categories** (see example below). Think about which categories of these sub-sectors can be addressed by residents.

Sector Example: Solid Waste	Target Sub-Sector Residential Waste	Category Paper/Cardboard, Food scraps, Metal, Glass Plastics
1.	1.	1.
2.	2.	2.
3.	3.	3.

**4. Once your sectors have been identified and a list of target categories is generated, make a list of actions for each category that residents can take to reduce their impact.** For example, if your sector/sub-sector focus is solid waste/residential and your category focuses within waste include food scraps, paper waste and textiles, you should make a list of actions for each category.

Sector Example: Solid Waste	Sub-Sector Residential Waste	Category Paper	Residential Actions Recycle Paper, Opt out of Junk Mail, Buy Items with Less Packaging	Check if High Priority
			1.	<input type="checkbox"/>
			2.	<input type="checkbox"/>

# Implementation Worksheet (cont.)

Sector Example: Solid Waste	Sub-Sector Residential Waste	Category Paper	Residential Actions Recycle Paper, Opt out of Junk Mail, Buy Items with Less Packaging	Check if High Priority
			3.	<input type="checkbox"/>
			4.	<input type="checkbox"/>
			1.	<input type="checkbox"/>
			2.	<input type="checkbox"/>
			3.	<input type="checkbox"/>
			4.	<input type="checkbox"/>
			1.	<input type="checkbox"/>
			2.	<input type="checkbox"/>
			3.	<input type="checkbox"/>
			4.	<input type="checkbox"/>

Now that there is a list of actions, identify the actions with the biggest impact by quantifying the reduction potential for each action. Depending on the strength of your existing data and internal analytics capabilities you may want to consider bringing in consultants for these portions of the research and analysis. But in many cases you will be the best equipped to answer these questions based on what resources are available to you. Additional resources are included below for further guidance and inspiration.

# Implementation by Budget

## No Budget

- Conduct research internally
- Use the resources listed below
- Review available research both inside and outside your city
- Identify gaps in data
- Meet with other city agencies, experts in the field, nonprofit organizations, relevant university departments and research institutions to fill gaps
- Identify city staff to conduct the data analysis

## Low Budget

- Follow no budget steps and outsource either or both the research and analysis phases
- For gaps in data, hire an outside contractor to design and implement strategies to fill gaps

## Optimal Budget

- Hire consultant to review your existing data, identify the gaps, conduct interviews, develop and implement surveys, and analyze all the accumulated data
- Consultant should deliver a ranked list of target actions along with data for determining target audiences, messaging and media channel strategies, and tools to measure the success of campaigns



## ADDITIONAL RESOURCES

**Google Scholar** has a wealth of peer-reviewed publications that can provide helpful research or help tailor your searches:  
<https://scholar.google.com/>

Use **GreeNYC's** New Yorkers' Contributions to a Greener, Greater City: A Behavioral Impact Study to get an in depth look at NYC's process for impact analysis:  
[http://www.nyc.gov/html/planyc/downloads/pdf/publications/greenyc\\_behavioral\\_impact\\_study.pdf](http://www.nyc.gov/html/planyc/downloads/pdf/publications/greenyc_behavioral_impact_study.pdf)

Use the **Natural Resources Defense Council (NRDC)** website to help generate lists of environmental actions:  
<https://www.nrdc.org/work>

**Cool California** offers an extensive guide for quantifying environmental impacts as well as connecting to funding sources:  
<http://www.coolcalifornia.org/local-government/toolkit>

**The Environmental Protection Agency (EPA)** website includes a vast array of sustainability behavior changes, large and small, from packing lunches in reusable containers to unplugging lights when not in use: <https://www.epa.gov/recycle/reducing-waste-what-you-can-do#Tips for Home>

**The Waste Reduction Model (WARM) Tool** (from EPA) can help determine the impacts of different waste reduction interventions:  
<https://www.epa.gov/warm/versions-waste-reduction-model-warm#WARM Tool V14>

**Energy Star** (an EPA program developed in 1992) has a guide for running water and energy efficiency competitions. In addition to great marketing tips, this guide includes examples of quantitative and qualitative goals: [https://www.energystar.gov/sites/default/files/tools/Building%20Competition%20Guide\\_112516.pdf](https://www.energystar.gov/sites/default/files/tools/Building%20Competition%20Guide_112516.pdf)





# Identify Target Audiences





## IDENTIFY TARGET AUDIENCES

For cities with millions—or even tens of thousands—of residents, it would be ineffective and virtually impossible to attempt to reach every single resident with a behavior change campaign. For any marketing campaign to have the greatest possible impact and still be strategic working with limited resources, cities must develop an approach for identifying their target audiences. **Specifically, it is crucial to identify subsets of the local population that are most relevant to the campaign.**

Communities can be extremely diverse, and individual residents will have a range of values, experiences, and self-perceptions that influence how they respond to different messages. Some people are very digitally focused, communicating and finding information primarily through their smart phones, computers and tablet devices. Some members of the community might be more hesitant about engaging with their local government. Others may see themselves as being well-informed, and are eager to engage with new initiatives they perceive as trendy or innovative.

Different people also have a range of lifestyles that can influence their ability to participate in targeted actions. A campaign aimed at reducing vehicle idling will probably fail to resonate with residents who mainly cycle or use public transportation. College students are far less likely to engage with a campaign to *weatherize* their homes. This section will explain how to use hard data to identify and prioritize audiences for campaigns, as well as provide tools for cities to explore segmentation analysis.

### AUDIENCE IDENTIFICATION

When identifying a target audience, a good starting point is to determine which audiences are relevant to a desired behavioral change or action. Next, it should be determined who is actually able to participate in

the proposed action. Some actions are more appropriately targeted to specific audiences, while others can be applied more broadly to the general population. Below are some examples of actions and their corresponding audiences.

FIGURE 3:  
Audience Identification

Environmental Goal	Action	Who Can Participate?
Reduce Air Pollution	Switch to EVs	Drivers
Renewable Energy	Install Rooftop Solar	Homeowners
Energy Efficiency	Use Appliances More Efficiently	Everyone
Reduce Paper Waste	Opt Out of Junk Mail	Everyone

Other considerations include the physical location and demographics of these audiences. What neighborhoods do these target audiences live in? Which neighborhoods happen to be near each other? What types of people compose the audience for the campaign? Understanding the demographics of your city's population, and reviewing data on age, gender, income, or highest educational attainment, can provide valuable insights. For instance, knowing your target audience's primary language is necessary to determine whether, and into what languages, campaigns need to be translated.

Demographics reveal one layer of pertinent audience information. A more complete picture comes from understanding their core behaviors and attitudes. Attitudes about ecological responsibility, and whose role they perceive it to be to improve the environment, can help inform your campaign and the way audiences are engaged.

Of those likely to participate in a given action, are there groups already engaged in the action? Can you determine, for example, who is already recycling or using energy-efficient light bulbs? If these groups are already participating in the target action, resources can be focused towards those who are not already participating.

Data are needed to determine the best audience for a behavior change campaign. **A strong understanding of audiences results in campaigns that are specific and tailored to engage the most likely participants.** In addition, targeting audiences will allow for an effective use of resources and a more strategic campaign overall. For example, if research shows that homeowners under 30 years old had positive opinions about recycling, and that they received most of their information through podcasts, resources can be directed to a campaign that targets young homeowners through relevant podcasts.

To locate the data needed for identifying audiences, a good starting point is to survey existing data within the city or from other studies. The more information gathered, the more specific and targeted the audiences can be. The census is a great source of demographic data, and it is possible that other agencies have already taken this data and conducted additional analysis that can be helpful for this work.

- A city planning department may have data on the breakdown of renters and homeowners.
- A transportation department may have information on the most used modes of transportation.
- The sanitation department may have information on current waste streams, recycling rates, etc.

The more information that is available with geographic information, the better. If any of this information has zip code- or neighborhood-level data, that will allow for an even more targeted campaign.

After assessing the available data, determine what information is still needed to identify audiences. There might be a lack of information on resident attitudes on the environment or other sustainable behaviors. It is also helpful to understand who is already participating in the action, or who might be willing to participate.

This can be done through surveys or focus groups. There are several ways to collect survey data and, depending on available resources and scheduling, surveys can be conducted in-person, by phone or mail, or online (or all of the above). If there is no funding available, a free Google Forms survey can be run from the program website. It is important to be mindful of the diversity of your city's population and make sure that survey data is representative. If certain populations are difficult to reach through a survey consider other means such as focus groups. When developing a survey, it is helpful to search for previous questionnaires to get strong examples of survey design and question formats. The resource section below includes information on survey/question design, as well as links to hundreds of existing questions that can be replicated.

When formulating a campaign, is important to identify who is already participating in a desired environmental action since groups already participating in the action do not need to be targeted. Instead, a city's limited marketing resources can be directed toward other groups not already engaged. Knowing how specific groups are already engaged can also provide insights on how to message and which media channels to use.

## AUDIENCE PRIORITIZATION

Once the audience groups are identified, it is time to prioritize among the possible target audiences for the campaign. If sufficient resources are available to reach all of your target audiences for a given campaign, then you can move on to develop its messaging. However, if your city is attempting to reach only those populations most likely to engage, then it is worth completing an audience prioritization exercise. Prioritization can be done through steps like comparing the relative sizes of audiences, the effort and expense involved in reaching each of them, and the strength of your demographic, attitudinal, and behavioral data.

Prioritization occurs once you have done your research and have a list of relevant audiences. The next step is to rank this list in order of priority. It helps to have this ranking when allocating resources for media and outreach. If there are strong geographic data available (e.g., car ownership by zip code, which neighborhoods participate in a composting program, or neighborhoods that have poor air quality), this can help prioritize your audiences as well. Specific location information can be helpful in determining precisely where to target media campaigns.

## GREEN SEGMENTATION ANALYSIS

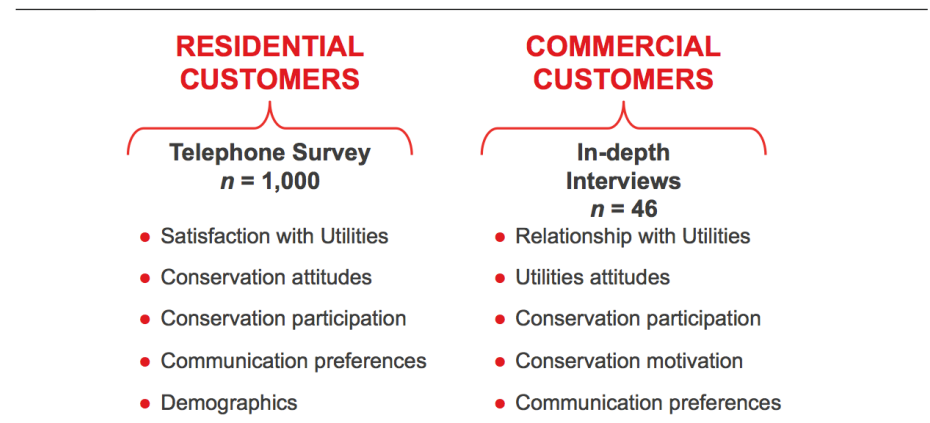
Audience identification and prioritization are important for campaigns focused on changing a specific environmental behavior. Another strong tool to supplement the audience planning process is a *segmentation analysis*. Green segmentation analysis is a useful starting point, providing a shorthand for target groups in your city and providing data on where groups are across green behaviors. There may be several different groups that have different demographics and behaviors, though all have some energy efficiency practices.

In Colorado, Fort Collins conducted phone surveys to better understand the attitudes and energy consumption behaviors of their utilities

customers. Residential customers were asked about what utilities services they used, their opinions on energy conservation, and their demographics. Commercial customers were polled about utilities usage, attitudes and motivations around energy conservation, and their communication preferences.<sup>6</sup>

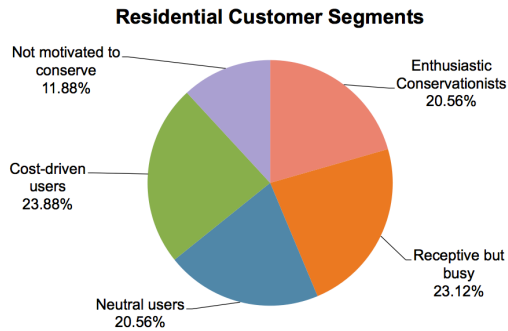
FIGURE 4:

Fort Collins Utilities Customer Segmentation Study



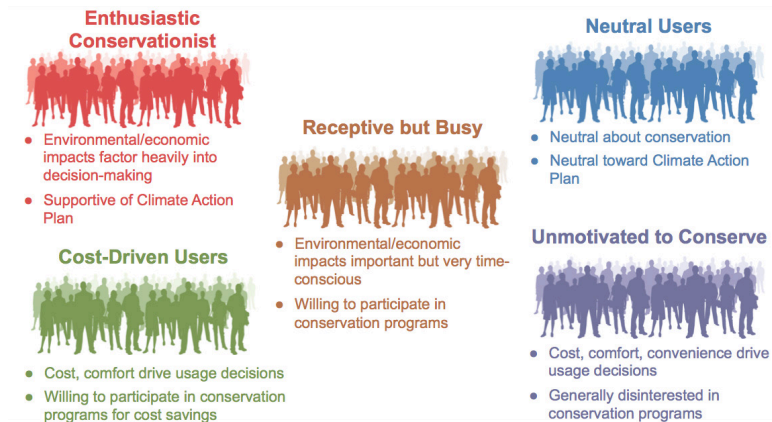
Based on their phone survey responses, customers were grouped into the following categories.

**FIGURE 5:**  
Fort Collins Utilities Customer Segmentation Study



Each of these audiences included details about their respective attitudes around conservation.

**FIGURE 6:**  
Fort Collins Utilities Customer Segmentation Study



Following this process, Fort Collins is using the information to identify which audiences are most likely to participate in any conservation effort and matching its messaging to customer preferences.<sup>7</sup>

For GreenNYC, there were five audience segments that had a range of attitudes and behaviors around environmental issues and media habits.<sup>8</sup>

**FIGURE 7:**  
New York City Green Segmentation Analysis

Current Green Behavior	Segment	Demographic features	Defining characteristics		
			Concern for Environment	Willingness to engage	Media Usage
<p style="text-align: center;">↑ MORE GREEN</p> <p style="text-align: center;">↓ LESS GREEN</p>	INADVERTENT GREENS (9%)	<ul style="list-style-type: none"> <li>Male</li> <li>Brooklyn</li> <li>Young &amp; middle-age</li> <li>Affluent</li> <li>More Republicans</li> </ul>	Average	<ul style="list-style-type: none"> <li>Feel disempowered</li> <li>Willing to pay for green</li> <li>Expect technology will solve problems</li> </ul>	Internet news sites and blogs
	PRAGMATIC HOME OWNERS (17%)	<ul style="list-style-type: none"> <li>Male / female</li> <li>Queens / Staten Isl.</li> <li>Older / married</li> <li>Higher income</li> <li>Homeowners</li> </ul>	Average	<ul style="list-style-type: none"> <li>Feel empowered</li> <li>Some skepticism on green problems</li> <li>Care about cost and convenience</li> </ul>	Television news and newspaper
	YOUNG URBANITES (15%)	<ul style="list-style-type: none"> <li>Female</li> <li>Manhattan</li> <li>Young / single</li> <li>All are renters</li> </ul>	High	<ul style="list-style-type: none"> <li>Feel very empowered</li> <li>Critical of local governments and corps</li> <li>Faith in self over technology</li> <li>Green isn't inconvenient</li> </ul>	Internet news sites and blogs
	ASPIRING GREENS (27%)	<ul style="list-style-type: none"> <li>Female</li> <li>All boroughs</li> <li>Middle aged / married</li> <li>Average income</li> <li>Apartment dwellers</li> </ul>	High	<ul style="list-style-type: none"> <li>Feel very empowered</li> <li>Critical of private sector regard environment</li> <li>Willing to be but when benefits are clear</li> </ul>	Television news and newspaper, low internet
	SKEPTICS (31%)	<ul style="list-style-type: none"> <li>Male / female</li> <li>All boroughs</li> <li>Single / younger</li> <li>Renting apartments</li> <li>Lower educational attainment</li> </ul>	Low	<ul style="list-style-type: none"> <li>Low empowerment</li> <li>Skepticism about environmental threats</li> <li>Green = expensive and inconvenient</li> </ul>	Internet news and television news

For a summary of key takeaways from this section, please refer to the [Quick Guide](#).



# Implementation Worksheet

This worksheet will provide you with a process for identifying audience(s) for specific behavior change campaigns.

## 1. Behavior Change Goal

(Example: reduce residential paper waste by 2% in 12 months)

**2. Make a list of everyone who can or who do participate in that behavior.** Is it all residents or a specific subsector - renters, drivers, homeowners, etc. (include all subsets)? Look at available data - is it people in specific zip codes?

(Example: All residents; subsets = residents with highest generation of paper waste; heads of households, avid online shoppers)

**3. Review the list.** Is there relevant data for demographics on these audiences to give insights into age, gender, native tongue, etc.?

List here:

(Example: Sanitation department data for levels of residential paper waste by zip code, census data for zip codes with high levels of paper waste, existing consumer research data demographics, and behaviors of avid online shoppers)

**4. Are these audiences found in specific neighborhoods/zip codes?**

If so, list here:

**5. Is there data for the current behaviors of these audiences?**

(e.g. 2,000 residents from target zip codes are already signed up for junk mail opt out program). If so, list here:

# Implementation Worksheet (cont.)

**6. Is there data for residents' attitudes towards the behavior?** (e.g.

30% of residents said that waste is a problem and they want to do their part to reduce it)? List any attitudinal data pertaining to the target action here:

**8. Is there data for the intended behavior of residents?**

(e.g. 50% of residents said that they would opt out of unwanted mail if it was a free, simple process to do so). If so, list here:

**7. Is there data for what would motivate or prevent residents from participating in the target behavior?** (e.g. opting out of unwanted mail will reduce clutter in mailbox and home, opting out of unwanted mail is easy). If so, list here:

If you have gaps in the data sets above, use surveys, focus group, or census data to learn as much as possible about the audiences for the campaign. Speak to other city agencies or partner organizations about useful data on audience geographies, demographics, behavior, or attitudes.

## AUDIENCE PRIORITIZATION

**9. Analyze all of the data you have for each audience.**

Rank them based on which audiences will have the biggest impact towards meeting the goal of the campaign.

1.

2.

3.

# Implementation by Budget

## No Budget

- Gather demographic data sets (easily accessible through census data)
- Find data on attitudes and behaviors for target behavior. Think about what parts of city government, nonprofits, utilities, academic institutions might have data that you can use
- Identify a strong data analyst within the city to review all data, analyze and make recommendations
- Create and conduct your own primary research through online surveys, interviews, focus groups

## Low Budget

- Start by taking the steps listed in the worksheet
- If the secondary data is leaving gaps in your data, consider hiring an outside firm to help you identify and implement a strategy for filling the most important gap
- Create and conduct your own primary research through online surveys, interviews, focus groups
- Purchase existing relevant consumer data sets

## Optimal Budget

- Hire a firm to conduct thorough primary research and analysis
- Deliverables should include a green *segmentation analysis* and detailed information regarding attitudes and current and intended behavior for specific actions. This data will make messaging and media planning more successful



## ADDITIONAL RESOURCES

**Steps To Identify Your Target Market**, is tailored to products but the guidance for identifying audiences can still be applied:  
<https://www.forbes.com/sites/chuckcohn/2015/02/06/steps-to-identify-your-target-market/>

**A Field Guide to Designing a Health Communication Strategy** that can be adapted for environmental behavior change campaigns:  
<http://ccp.jhu.edu/documents/A%20Field%20Guide%20to%20Designing%20Health%20Comm%20Strategy.pdf>

**The University of Kansas Center for Health and Community Development** has a helpful discussion of the audience segmentation process:  
<http://ctb.ku.edu/en/table-of-contents/sustain/social-marketing/reach-targeted-populations/main>

# Craft Messaging & Campaign Design



## CRAFT MESSAGING & CAMPAIGN DESIGN

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When it comes down to it, the decisions we make around a campaign's messaging and look can have the greatest single impact on whether our marketing for action efforts succeed or flop. Messaging includes the text, *tone* and length of your ad—also referred to as the copy—which can be further supported with smart, clean design. This section identifies the opportunities and potential pitfalls presented by campaign messaging.

### MESSAGING DESIGNED TO ENGAGE

When designing public-facing campaigns around environmental behavior change, it is often tempting to use messaging that is directly connected to the city's own goals for the campaign, such as reducing greenhouse gas emissions or improving environmental quality. But this is usually not the most successful practice. One should avoid developing messaging based on intuition or what one thinks is known about the audience. It is absolutely critical to do the hard work of learning what they actually *do* think.

**A wise strategy is to move the focus away from what motivates the city sustainability office over to what really motivates residents.**

Motivations are not universal. Thus, conducting adequate audience research in the earlier phase/s of planning will help you to identify your target audiences. Based on the results of this target audience identification process, and additional research, the messaging most likely to resonate should become apparent.

If you are unsure about where to begin with your messaging, presented below is one possible approach you can use to develop a clear and compelling plan.

### A CLARION CALL-TO-ACTION

It is important to be clear about the focus of the messaging. Start with a high-level *call-to-action* (CTA). A call-to-action is a clear instruction to your audience. The target behavior change should be the basis of your high-level call-to-action.

People will often only have a few moments to interact with the message. So avoid making them have to work too hard to get—or, worse, guess at—what is going on in the ad. Examples of a clean, clear and high-level CTA include Bike to Work, Drink Tap Water, Buy Less Stuff.

A second call-to-action (CTA) should appear in your ad as an action that your audience can take immediately. This is important to start getting people engaged right away. A second call-to-action, and subsequent audience behavior, can be used to create metrics for measuring both the immediate impact and overall success of the campaign. Examples of secondary calls to action include:

- Make a pledge now
- Learn more at [URL]
- Sign up for our email list
- Visit this map of locations

More about leveraging this key campaign element can be found in [Analyze Campaign Effectiveness](#).



As part of San Jose's Large Item Removal Program (now known as the Junk Pickup Program), ads were placed around the San Jose Giants' Municipal Stadium (see below)—the baseball field for the city's minor league baseball team—with a large and clear call-to-action to visit the program's website for further details about their solid waste diversion program.<sup>9</sup>

### IMAGE 1:

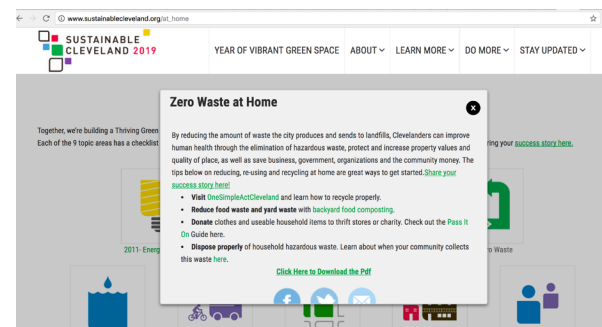
Large Items Billboard at San Jose Giants Game



The website for Sustainable Cleveland (see Image 2) has a drop-down menu that reads, "Do More" where residents browsing the site can learn about all the different ways to adopt sustainable behaviors. Under Waste Reduction, the site offers several calls to action for residents, including the sharing of their success stories via the program website.

### IMAGE 2:

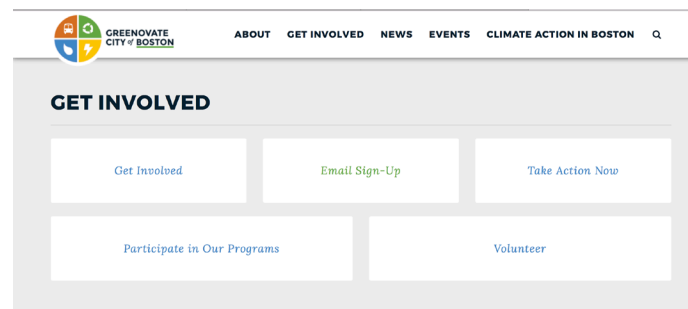
Sustainable Cleveland Call-to-Action



Boston's website includes multiple clean and clear calls-to-action for residents to get more involved in their programs.

### IMAGE 3:

Greenovate Boston Call-to-Action



**JOIN THE MOVEMENT TO GREENOVATE BOSTON**

## SPEAK TO MOTIVATORS, ADDRESS BARRIERS

Having a strong understanding of the target audience helps shape the *content* of your messaging. As with many of the other elements covered elsewhere in this guidebook, developing an effective messaging strategy should be grounded in and shaped by data. Review available audience data to better understand what will genuinely motivate people to participate in your target action and what possible barriers might prevent them from participating in the action.

If you are planning a weatherization campaign and your data show that residents would weatherize under the following conditions:

- If they were certain weatherization would reduce their monthly utility bill by 30%; or
- If by doing so they knew their homes would feel more comfortable in winter due to less heat escaping.

But your audience data also reveals a potential barrier - residents may feel overwhelmed by the task of implementing necessary home repairs and modifications. You are now armed with new insights into two potential motivators and one barrier, all of which should be considered when developing your messaging strategy.

Note that neither of the two motivators nor the barrier explicitly has anything to do with sustainability or the environment. Messaging for this campaign would then focus on financial savings, personal comfort, and easy steps to seal and insulate to form the core of a successful marketing strategy.

Understand what motivates residents and create campaigns that speak to those motivations. For many residents, cost savings and health benefits are major motivators. Always look for ways to link the desired action with benefits that speak to residents' true interests—rather than your sustainability office's agenda.

GreenNYC's research identified multiple messaging approaches the organization could use to engage and compel New York residents to change behaviors. In this bike to work advertisement, for example, the messaging is speaking to the health motivations of New Yorkers that were uncovered with audience research. Interestingly, there is no messaging about bicycling being better for the environment. The audience data also helped shape the Bike to Work! call-to-action, backing it with motivators and a secondary call-to-action to visit the website for more information.

### IMAGE 4:

GreenNYC Subway Advertisement



## DEVELOP AND TEST MULTIPLE MESSAGES

To have the greatest success with these marketing tools, it is a good idea to test variations on your message before pouring all your resources into the main campaign. One proven methodology for testing the chances for success of different ads is through *A/B testing*. A/B testing is a way to gauge the relative effectiveness of two messages by releasing two variations of an ad at once, then comparing the public engagement to see which ad better resonated with target audiences.



A/B testing with a small sample before the official launch can maximize the success of the campaign and budget resources. Your two messages can either vary by language or graphic design, but not both. Changing too many variables, of course, makes it impossible to clearly determine the influence of any single one.

In San Jose, A/B testing was utilized in a campaign aimed at reducing the amount of illegal dumping occurring around the city. To reduce illegal dumping, the city established a free pickup service for large items. San Jose mailed postcards to residents informing them about the availability of this free city service.

Before launching the official campaign, test messages were sent on postcards to a sampling of 6,000 San Jose residents. Half of these residents received a postcard with messaging mentioning the negative cost impacts to San Jose every time someone illegally dumps. The other half received a postcard framing the free pickup service as a special offer extended only to residents selected by the City.<sup>10</sup>

### IMAGE 5:

San Jose Direct Mailing Postcard A



Call/ Llame al/ Gọi số: 408-213-7800 or  
Visit/ Visite/ Đến viếng: [bit.do/largeitems](http://bit.do/largeitems)

While there was great compliance overall among households that received both postcards, the “you’ve been selected” postcard was 42% more effective than the “cost to the city” postcard. This testing informed the communications for other San Jose marketing campaigns.<sup>11</sup>

### IMAGE 6:

San Jose Direct Mailing Postcard B



Call/ Llame al/ Gọi số: 408-213-7800 or  
Visit/ Visite/ Đến viếng: [bit.do/largeitems](http://bit.do/largeitems)

### KEEPING IT SIMPLE

Messaging for a campaign should be readily accessible to be really effective. Including too much information in the message will undoubtedly overwhelm your reader. When residents first see your marketing campaign, the text should be minimal and the language used should be clear.

#### Your messaging should be kept simple, clear, and accessible.

Don't overwhelm your audience with academic jargon and scientific terms. Talking about metric tons of solid waste reduced is not as compelling as the promise of a mailbox free from the constant clutter of unwanted catalogs and junk mail.



## Nudging

*Another effective messaging motivation tool is called nudging.*

This is the act of presenting choices or options in such a way as to present the desired choice as the easier, or default, option. The book, *Nudge: Improving Decisions About Health, Wealth, and Happiness*,<sup>11</sup> discusses how people do not make decisions in a vacuum, and that choices are, instead, determined by a number of influences (some of which a person may not even be aware of). A *nudge* is a way to encourage people to make the preferred choice, without forcing outcomes. A nudge does not tell a person what decision to make. It merely presents a more appealing option<sup>12</sup>

The United Kingdom even had its own Nudge Unit in the government. In 2010, former Prime Minister David Cameron established The Behavioral Insights Team. While the office is now a separate entity from the government, this spin-off organization has used behavioral science to develop all sorts of nudge tools.<sup>13</sup>

These tools include a recruitment strategy that reduces bias in hiring and helps students help their grades through a social support texting program that reminds students of test dates. A fun, health-related nudge in Stockholm, Sweden, consisted of a set of stairs that were converted into a working piano to nudge transit riders to choose taking the stairs over the escalator.<sup>14</sup>

In Austin, the city-provided residential recycling bins are much larger than the garbage bins in an effort to encourage residents to reduce waste. These two bins do not require that people create less waste, but gently encourage more recycling through their design.<sup>15</sup>

## DESIGN

A strategic approach to the visual representations that accompany messaging is critical to the success of your marketing materials. Design should be clean, positive, and should serve to aid residents in absorbing the messaging of the ads.

The ad below from San Francisco's composting campaign uses clear messaging and design to connect with their target audience of "foodies." The messaging skillfully sums up a complex process into clear and engaging text. The design directs the audience to focus on the part of the message that is most pertinent to them by putting "Table to Bin" in uppercase and in a large, thick font. The placement of food images in the background image serve to provide clear examples of the types of food to compost without adding clutter to the ad. The design detail of creating a block around the URL serves a dual purpose of bringing the reader's attention to the URL itself as a resource for additional information, but also to the social norming message within, "Real Foodies Compost." Note that the ad does not mention sustainability or the environment, nor does it use fear or guilt as a tactic.

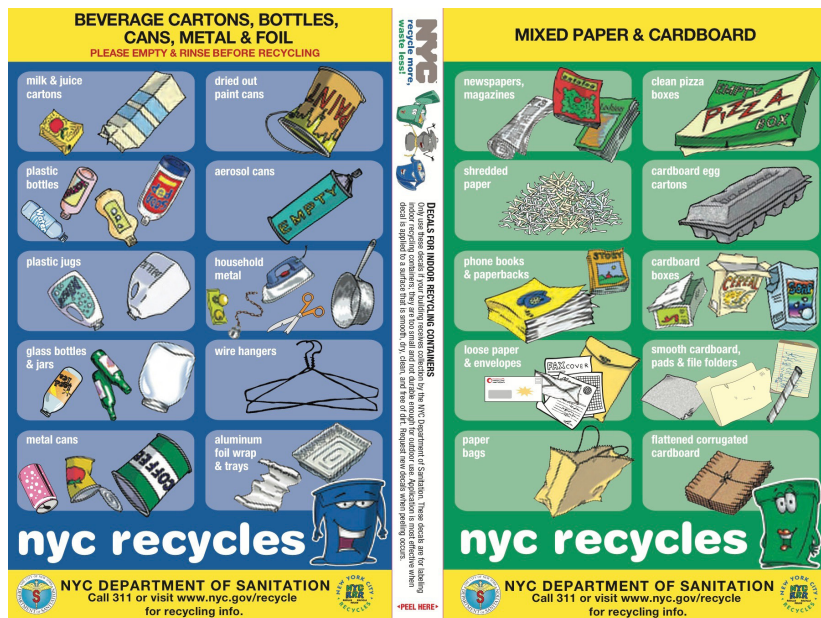
### IMAGE 7:

Real Foodies Compost Poster



In New York, there is a recycling campaign to explain to residents which items can be recycled. The Department of Sanitation developed an initial graphic illustrating the different waste streams. It is color-coded to differentiate between paper and aluminum/glass recycling. However, in this first version, there are too many examples provided, the illustrations are hard to decipher, and it becomes confusing to determine what can be recycled.

IMAGE 8:  
New York City Department of Sanitation Recycling Poster



The poster was then redesigned to convey the information more simply and clearly. The new campaign has 6 categories instead of the original unwieldy 24.

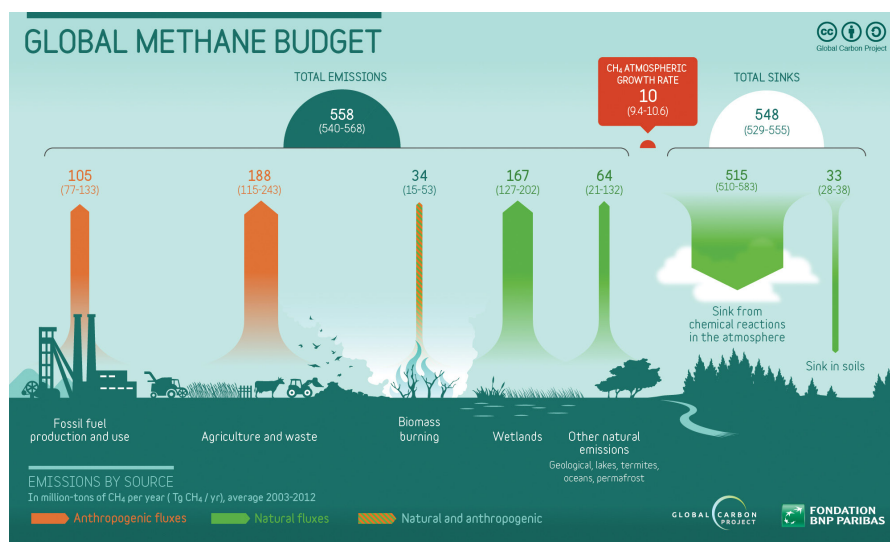
Note how the text categories are now displayed, and the graphics are cleaner and clearer, and grouped together in a way that makes them easier to understand quickly.

IMAGE 9:  
Revamped New York City Department of Sanitation Recycling Poster



*Infographics* are another strong design tool for conveying a large amount of data in a clear, concise way. They are a visual representation of data. It is an easier way to display data or explain a process that could be confusing if described using text. The graphics should be used sparingly, as too many infographics can also become overwhelming. Here is an example from the Global Carbon Project that illustrates the breakdown of global methane emissions.

IMAGE 10:  
Infographic Example



## KEEP IT POSITIVE

Research shows that residents do not respond well to messaging rooted in guilt, fear, or shame. While talking about the environment can get technical and complicated, it is important to keep your messaging simple and to avoid wonky terms. Instead of saying, “From our planet’s point of view, there’s no throwing garbage out. Because there is no out” a message like, “Buy Less: it’s good for your wallet and creates less waste later” might be more effective.

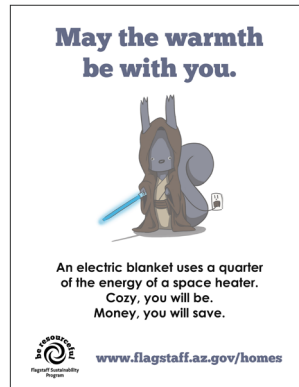
A doomsday scenario does not motivate residents to take action. People get overwhelmed, thinking that there is nothing that can be done. It is far more effective to frame the issue locally, and pivot quickly to solutions.<sup>16</sup> People tend to shut down when presented with too many words or depressing scenarios, so it is important to encourage behavior change without evoking fear, being too technical or academic, or overwhelming people with exhaustive information.

In order to encourage residents to reduce energy usage, Flagstaff uses a fun, friendly campaign invoking Star Wars imagery (see image 11). This messaging speaks to cost-savings motivations. The advertisement is providing a cost and energy-efficient alternative to using a space heater, and achieves this with a simple graphic and sparse, engaging text.



IMAGE 11:

Flagstaff's Energy Saving Campaign



In a Flagstaff waste reduction campaign poster (below), the mascot Albert is encouraging residents to buy less stuff. As with the health advertisement, the graphics are simple and support the messaging. The message uses a conversational tone and speaks to cost savings to discourage excessive consumption.

IMAGE 12:

Flagstaff's "Be Resourceful" Campaign



The New York City Department of Health and Mental Hygiene has an effective campaign for sexual health. The "New boo? We've got you covered!" campaign lets New Yorkers know that the City's health centers are non-judgmental, supportive places, that health centers are a resource for residents to get tested, and that the centers do not shame people for having a new sexual partner.

IMAGE 13:

New York City Department of Health, Sexual Health Campaign



This is a part of a series of advertisements that market judgment-free health services from the New York City Department of Health. Note that, for these advertisements, simple colors and illustrations are used. Very few words are used as well. There are two versions of this advertisement, and the one designed for social media has even less text. A person waiting for the subway may have more time to engage with this poster than someone scrolling through Twitter. However, the additional text in the subway advertisement reinforces the unified message of judgment-free health care, and provides additional information for how people can engage.

## LANGUAGE ACCESSIBILITY

An important part of messaging is ensuring that all of the residents you are targeting can access the messages. Use Census Data or existing demographic information for your city to understand the primary languages spoken by your audiences in targeted areas. The New York City Department of Health and Mental Hygiene had a campaign to encourage regular colon cancer screenings for residents. There are dozens of languages spoken in New York, so it was crucial for marketing be multilingual.

### IMAGE 14:

New York City Department of Health Colon Cancer Screening Campaign



For a summary of key takeaways from this section, please refer to the [Quick Guide](#).

# Implementation Worksheet

This tool is designed to help you plan the language, tone, look, and style of your marketing campaign.

**1. Start by listing out the components of your campaign that have already been identified.**

Target behavior change (e.g. Reduce Junk Mail):

Campaign goal  
(e.g., reduce residential paper waste by 2% within 12 months):

Target audience(s): (e.g., residents)

**2. Next, you will need to identify and gather data for your target audienc(es) demographics, attitudes, and behaviors.**

List pertinent data here:

Demographic data:

Attitudinal data for motivators and barriers:

Behavioral data for current and future intended behavior:

# Implementation Worksheet (cont.)

This tool is designed to help you plan the language, tone, look, and style of your marketing campaign.

**3. Conduct an inventory of past or existing campaigns done by other cities on the target behavior.** Review and analyze data listed above along with research from other cities to determine messaging strategies for each audience. List here:

Audience 1: (i.e. homeowners over 50 years old living on the east side)	
Messaging Strategy (focus on financial benefits)	
Audience 2:	
Messaging Strategy	
Audience 3:	
Messaging Strategy	



# Implementation Worksheet (cont.)

This tool is designed to help you plan the language, tone, look, and style of your marketing campaign.

**4. Using the strategy above, craft messages. List potential messages that consider the optimal direction for content, tone, language for the target audiences.** Think about how these messages encourage audiences to make a behavior change. Be sure to keep the following guidelines in mind when developing the messaging:

- Speak to the motivations and/or address barriers of your target audience
- Keep it simple
- Keep it positive

	<b>Message A:</b> Example - Love online shopping but hate mailbox clutter? Opt-out of unwanted catalogs at [campaignwebsite.com].	<b>Message B:</b> Example - Make room in your mailbox for the good stuff. Opt-out of unwanted catalogs at [campaignwebsite.com].
<b>Audience 1:</b> (example - High volume online shoppers).		
<b>Audience 2:</b>		
<b>Audience 3:</b>		

**5. Develop a plan to run A/B testing of those messages** (e.g. Facebook ads and email blasts testing both messages). List ideas for pre-launch testing of messages.

**6. Define how design elements will be used to support the messaging strategy** (e.g. design will show relatable clutter of full inbox).

# Implementation by Budget

## No Budget

- Use the Worksheet above to do the message development in-house
- Use existing resources for designing the artwork for the campaign
- Plan and run A/B testing using your social media pages, newsletters, website or by using a free tool like SurveyMonkey

## Low Budget

- Use the Worksheet above to do the message development in-house
- Hire a designer to develop strong artwork for your campaign
- Plan and run A/B testing using your social media pages, newsletters, website or by using a free tool like SurveyMonkey

## Optimal Budget

- Hire a copywriter to use your audience and messaging data to create compelling ad copy
- Hire a designer to develop strong artwork for your campaign
- Plan and run A/B testing using owned and paid media



## ADDITIONAL RESOURCES

This guide synthesizes the latest academic research and message testing on climate communications from across the social sciences into one practical guide to support communities and meaningful discussions of climate change. **Let's Talk Communities and Climate: Communication Guidance for City and Community Leaders**  
<https://ecoamerica.org/wp-content/uploads/2017/03/ea-lets-talk-communities-and-climate-web.pdf>

To learn about the ten principles of climate change communication, check out **Connecting on Climate: A Guide to Effective Climate Change Communication**,  
<http://www.connectingonclimate.org>

To learn about using “**nudges**” as effective tactics for messaging, read **Nudge** by Richard H. Thaler and Cass R. Sunstein, visit the Nudge Blog,  
<http://nudges.org/tag/environment/> or read about Choice Architecture: <https://ssrn.com/abstract=1583509>

Read more about the **San Jose A/B Testing** for Junk Removal:  
<http://www.sanjoseca.gov/Blog.aspx?IID=54#item>

# Build Trust by Building Your Brand





## BUILD TRUST BY BUILDING YOUR BRAND

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A brand is much more than a mere logo or tagline. Branding represents your promise and commitment to a better world. It expresses to residents the values and even the personality of your program. **A good brand evokes feelings. It reflects your commitment to local residents about what your behavior change program represents, what it aims to achieve, and the impact you intend for it to have on the city.**

Building a quality brand requires a clear strategy, dedication, and consistency. Your brand comes across in every interaction with the public: from the look and feel of your website, to the tone of your Facebook posts, to the language used by volunteers at events to describe your initiatives. Government programs do not typically prioritize brand development, but it is important that you be careful and deliberate about developing your brand. If you fail to take the lead in defining who you are, the market will do it for you, potentially with undesirable outcomes. A far better plan is to manage public perceptions from the outset by thinking through your brand.

### STRATEGIC THINKING ON BRANDS

The process of developing a brand strategy can be complex. In this section of the guidebook we will focus on basic guidance for developing a sound brand strategy. By thinking through some simple questions, like the ones suggested below, a direction for your brand will begin to emerge:

- What is the program's mission?
- What are your values?
- What makes you distinct from other environmental education programs across your city?

Your mission speaks to your overarching strategy and goal, for example, to provide city residents with clear and compelling information to prompt changing behaviors that will reduce individual household contributions toward citywide GHG emissions, solid waste, water usage, and/or air pollution.

- What is the program's purpose?
- How will you know when you have achieved success?
- What is your philosophy for behavior change?

Purpose speaks to the program's *raison d'être*, such as to leverage the impact that residents' actions can have in reducing *carbon emissions* to mitigate the impacts of climate change.

- Who is the audience? What tone will they respond to?
- What feeling(s) do you want your brand to evoke from residents?
- Why should residents care about what you have to say?
- Why should people trust you?

Another component to building a strong brand is knowing your audience.

**Understanding what your audience values and how they think will ensure that the brand is something relatable and meaningful to them.**

Your brand's target audience will most likely be your residents, and your brand development should be focused on this primary audience. But there will also be several other audiences coming across your brand that can be engaged as well. This includes potential funders, local government officials, and relevant private companies.

To develop the brand strategy, consider what qualities audiences should associate with your brand. How are you appealing to the passions and



sensibilities of your audiences? Is your brand friendly and playful? Or is it more forward-thinking and innovative? Consider also how your brand is unique. Is it approachable? Is your brand opaque or more matter of fact? This process can be helped along by researching similar programs in other cities and learning what you can from their branding. What was the tone for their messaging? Did they use a tagline? Toward whom was the ad's messaging primarily directed?

A strong brand also elicits an emotional response from your audience.<sup>18</sup> Emotion does not necessarily mean something as explicit as joy or sadness. Bear in mind that people make decisions every day based on how something makes them feel on a gut level. How should people feel when they see your brand? Should your audience feel happy or amused? Motivated? If so, why—because they feel shocked or outraged? Encouraged or empowered?

## BUILDING UP THE BIRDIE BRAND

The brand strategy GreeNYC developed was meant to be positive and accessible. The program intentionally wanted to move away from previous approaches that used guilt, shame, or induced fear to drive behavior change. To make the GreeNYC brand more accessible, the Birdie mascot was created. Birdie intentionally has a clean design using simple graphics and bold colors that are easily recognizable. The minimalist shapes and colors selected lend themselves to easy use in print media, digital platforms, and campaign event materials.<sup>19</sup>

Birdie is designed to connect with all New Yorkers. Birdie is not an environmental expert—just a regular New Yorker. Birdie never condescends down to residents about why they must recycle or ride their bicycle more. Instead, Birdie is learning how to engage in green behaviors right along with everyone else. The green behaviors presented are simple, achievable steps that will add up to a major impact, hence the tagline: Small steps, big strides.<sup>20</sup>

IMAGE 15: Birdie

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## BUILD YOUR BRAND

All components should be a consistent, reinforcing, and cohesive. To build a brand, use the information gained from your work to identify your brand's mission, purpose, and audience to develop a logical direction for the eventual tone, language, and the visual elements of the brand. The brand's mission and values should be integrated with all your visuals, messaging, and tone to communicate a coherent and consistent message across all program-related materials. Your *brand identity* is actually an extension of a campaign's mission, and should be developed with the audiences in mind. Creating your own style guide with direction for colors, fonts, photography, and logo use and placement can help ensure that all future advertisements, websites, email signatures, and merchandise stay on brand.

Boston launched the Greenovate brand to convey values of sustainability and innovation for the City of Boston. The logo (see graphic on the following page) seamlessly demonstrates which key sectors Boston is innovating toward greater environmental sustainability.

IMAGE 16:  
Greenovate Logo



Once you've developed your brand identity, you will want to make sure it comes through on all your materials. The language, colors, fonts, tone, and style should be consistent in all instances and across all communications. Washington, D.C. has a very effective branding campaign—the Sustainable DC brand is immediately recognizable. One glance at any of D.C.'s campaign materials and you immediately understand that it is related to the Sustainable DC initiative (see Images 17 - 19).

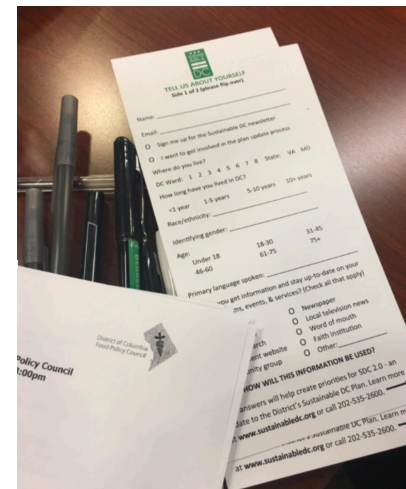
IMAGE 17:  
Sustainable DC Logo



IMAGE 18:  
Sustainable D.C. Ambassadors



IMAGE 19:  
Sustainable D.C. Survey





## MASCOTS

*Having a mascot to represent the campaign is one way to have an easily identifiable visual that cuts through the media noise.*

If it makes sense for the goals of a campaign, having a mascot to represent the campaign—on ads and at events—is one way to have an easily identifiable visual that cuts through the media noise. A mascot can evoke emotions and forge lasting connections with your audience. Mascots have universal appeal – they can appeal to all ethnicities, genders, sexual orientations, language groups, and religious affiliations. Nevertheless, should you decide to introduce a mascot character into your branding, be deliberate about how it is used. Messaging around a mascot—the voice, tone, look and feel—should remain consistent with your overall brand strategy.

For GreeNYC, the Birdie mascot communicates messages in a simple yet compelling style, always in a positive tone. He's not an authority talking down to New Yorkers; he's learning how to live more sustainably along with everyone else.

IMAGE 20: Birdie

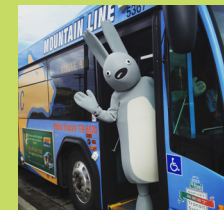


Flagstaff's squirrel mascot, Albert, is a lifelong resident, engaging other Flagstaff residents as he learns about different ways to live more sustainably.

IMAGE 21:  
Albert in Flagstaff Water  
Conservation Advertisement



IMAGE 22:  
Albert the Mascot  
on the Mountain Line



The purpose of a mascot is to encourage engagement. All of these mascots are friendly, approachable animals that are making behavior changes every day along with their fellow residents. It is important to be thoughtful when developing a mascot. Think about how the costume will look and work before producing it - does it have limitations for movement, in what ways may it be uncomfortable for the person wearing it, how will it be cleaned, where will it be stored, does it look appealing from all angles?

Brand messaging should be rooted in your brand's mission and purpose. What type of messages does your brand convey? What messages about sustainability should it convey? Does your brand communicate efficiency? Does it communicate tradition? Think about the tone being used for your brand. A formal tone will elicit a different engagement than a conversational tone.

Thinking through your brand messaging and voice can help with crafting a tagline. This can be a brief, meaningful statement that articulates a brand. Think about all of the taglines that you recognize even without the brands being named (“Think Different”, “Can You Hear Me Now?”). What type of tagline can capture the core sense of your brand in just a few words?

## ACTIONS SPEAK LOUDER

Your brand values should be consistent with all other aspects of the brand as well. This means that, if your program is focused on reducing solid waste, then your promotional items should also help people to reduce waste, and certainly not contribute in any way toward creating more waste itself. For instance, instead of printing hundreds of paper flyers for an event, consider creating a giveaway—like a reusable shopping bag—and asking attendees to take a pledge (see Image 23 below). Tactical decisions like this can help you communicate the idea of reducing paper waste through the campaign's actions. At the same time you can be equipping your audience with tools to participate in your target behavior change while simultaneously engaging them in your core values on the importance of carrying reusables to create less waste.

## IMAGE 23:

Residents Pledging to Use Less Plastic



## PUT IT EVERYWHERE

In order to gain brand awareness, your brand has to be very visible.

**Place your brand in as many places as possible, and be consistent with how you use it.** Develop a logo, and brand everything from email signatures to office letterhead, advertisements, social media posts, and t-shirts. The more familiar others are with your brand, the more familiarity there is with the campaign, and the higher likelihood of engagement with your future efforts.

## BRAND EQUITY

Keep track of brand awareness and attitudes toward your brand. Identify your baseline as a starting point so that tracking your progress over time will be easier. For example, it would be helpful to understand how many people are familiar with your brand—either by name and/or with the associated visuals. Get a sense of how much traffic your website and social media sees before a re-brand. You can monitor ongoing



engagement through social media, email communications, website traffic analysis, and surveys.

Your brand can be your most valuable asset. **Dedicating time and resources to building *brand equity* is making an investment in the future of your program.** If your brand successfully and widely connects with your audience to evoke positive feelings and achieve measurable behavior change, then your equity is high. High brand equity will build long and strong relationships with residents, open up doors for leveraging partnerships, and increase funding opportunities. It is important to keep your branding consistent and maintain its integrity.

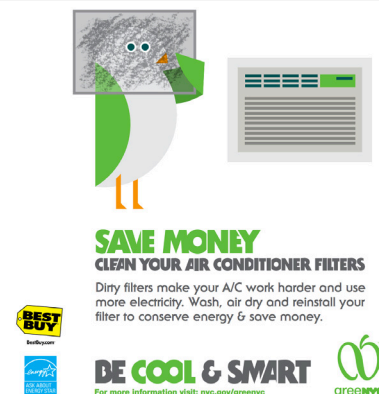
## PARTNERSHIPS

A successful brand can lead to third-party partnerships, which can amplify your program and carry your message to a wider audience. Partnerships can be internal with other agencies in your city, or external with public service institutions such as universities or hospitals, or with interested corporate entities. The strongest partnerships are mutually beneficial to the partner and the city, and should be aligned with your brand mission, purpose and values. An electronics chain might be open to a campaign encouraging people to buy energy-efficient products. A restaurant chain may be interested in collaborating on a campaign that encourages patrons to compost their food scraps.

In New York, the GreeNYC program partnered with major companies like Best Buy, Home Depot, other municipal agencies—transportation, parks, sanitation—and advocacy nonprofits like the Environmental Defense Fund to increase the visibility of its campaigns. GreeNYC partnered with Best Buy for a “Save Money” campaign to promote energy-efficient air conditioning use, which took the messaging directly into stores and in the form of ad placement around the city (See image 24).

## IMAGE 24:

GreeNYC/Best Buy Partnership



GreeNYC also partnered with smaller-scale local businesses to promote the BYO campaign, alerting residents that they could refill their reusable bottles inside, through visual street-level prompts via the store-front windows of local businesses.

## IMAGE 25:

GreeNYC/7-Eleven Partnership



Obtaining constructive brand feedback will require research, as well as conversations and surveys with colleagues, other agencies, supervisors, and the target audiences. **Receiving feedback on tone, feelings evoked, trustworthiness, design, and messaging will help build and maintain a successful brand.**

You will also want to understand how people tend to interpret your brand values and mission based on what they see. You can help gauge their reactions by providing your colleagues with a range of adjectives they can use to describe the brand. Ask them if they find it more serious or playful? Is it practical or more idealistic? Is the brand identity interpreted differently internally than it is by external *stakeholders*? Your intentions may be to present a brand that conveys strength and resilience but it may be interpreted by others as cold, distant, or too formal. This research does not mean crowdsourcing taglines or logos, but it is a good opportunity to gain valuable insights into what audiences value and how they respond.

## REBRANDING

There may be instances where you are inheriting an existing brand or need to change the major elements of your branding to express a new direction or identity for the program—this is known as a *rebrand*. It would be helpful to do a *brand audit* and identify all the places your branding exists, and how the program has used it to date. Research your brand awareness, or how residents feel about the brand. If this information does not already exist, collect it by developing a survey. It is still very important to think through the mission, purpose, and target audience, and to verify whether the current brand matches up. After conducting this research, and thinking through the brand concepts, you can decide on the appropriate adjustments to make to complete your rebrand.

For a summary of key takeaways from this section, please refer to the *Quick Guide*.



## Independent Branding

*It is important to think about where your brand lives.*

Pause to consider the advantages of having your brand exist as an independent entity. The mission, purpose, audience and messaging for a behavior change brand are often quite different than those of a citywide sustainability plan, or the brand of a city office.

The target audience for a behavior change program is city residents. Comprehensive sustainability plans may target academics, practitioners, or other cities. Since a brand is so mission- and audience-driven, it could be a challenge to reach the target audiences using only your city logo. Carefully weigh the advantages and challenges of establishing an independent brand for your campaign.

## Build Trust by Building Your Brand

# Implementation Worksheet

The goal of this section is to help you gather the information, thoughts, and ideas necessary to help develop your brand. By taking time to answer the questions below, a strategy will begin to emerge.

What is the program's mission?	
Who is your audience(s)?	
What are your values?	
What makes you distinct from other environmental education programs across your city?	
What is the program's purpose?	
What is your philosophy for behavior change?	
Who is the audience? What tone will they respond to?	
What feeling(s) do you want your brand to evoke from residents?	
Why should residents care about what you have to say?	
Why should people trust you?	
How will you know that your brand is successful?	

# Implementation by Budget

## No Budget

- Identify and engage a small internal task force to work on the brand strategy
- Complete the implementation exercise above
- Use existing research to develop brand strategy, market positioning and messaging architecture
- Work with a city designer or outside design firm (pro bono) to build the brand identity

## Low Budget

- Complete the implementation exercise above
- Hire a branding expert to help you develop your brand strategy or use existing research to develop brand strategy, market positioning and messaging architecture
- Hire a creative agency to develop your brand identity

## Optimal Budget

- Hire a branding firm to create, test, and implement your brand development and brand building strategies
- Hire a creative agency to develop your brand identity



## ADDITIONAL RESOURCES

A helpful look at developing a **government brand**:

<https://www.govloop.com/community/blog/government-branding-basics/>

This site provides helpful insights for **building a brand**:

<http://freshsparks.com/successful-brand-building-process/>

This site provides helpful tips for **building brand equity**:

<https://www.entrepreneur.com/article/77408>

**The Guide to Branding for the Public and Nonprofit Sectors** provides in depth discussion on each of the major components

for brand development that can be applicable to local governments: [http://www.mikekujawski.ca/ftp/cepsm\\_branding\\_ebook.pdf](http://www.mikekujawski.ca/ftp/cepsm_branding_ebook.pdf)



MARKETING TOOLS:

# Media Planning & Beyond



## MARKETING TOOLS: Media Planning & Beyond

After the important work has been done determining the target behavior change, audience and messaging, the next phase is to identify and plan the appropriate marketing tools to connect with your target audiences. A wide range of marketing tools is available. In this section we will explore the most common and relevant media tools and how they can be applied across owned, earned and paid media as well as some other highly useful marketing tactics, including promotional materials and events.

**Each aspect of campaign development is crucial, but the marketing tactics in particular affect all the moments that the audience connection happens.** Whether a connection forms with that audience is up to you. It is important to think about how and where an audience connects with a message, how often they have opportunities to interact with it, and what reasons they have to engage with the campaign. Your time spent on selecting the right marketing tools and the strength of your analysis need to be as strong and robust as all of the other components going into the campaign in order to achieve marketing that successfully leads to action.

### MANAGING YOUR MEDIA

Media refers to mass communications, usually disseminated through print, television, radio and digital means, and is often referred to collectively as media channels. Media channels account for most of the ways messages filter down to reach the public.

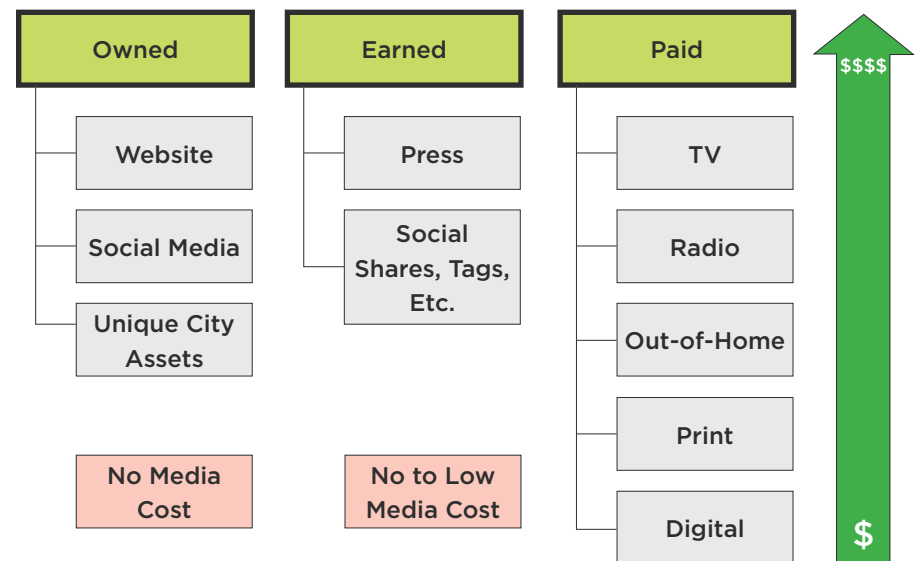
These channels fall into three major categories: owned, earned, and paid media. Owned media is media owned or managed by the city (websites, Twitter handles, a newsletter, Facebook pages). Earned media is when the owned media garners attention and gets shared by others in ways that amplify your message via a news story, Facebook share, or re-Tweet. Paid

media includes advertisements purchased for television and radio, digital ads, and *out-of-home* advertisements like bus shelters, billboards, and subway ads.

Campaign goals and data on audience attitudes and behaviors can help inform which media channel makes the most sense to use. These types of media should not be used in isolation—they often complement each other. A strong marketing campaign will often need to integrate elements of all three.

FIGURE 8:  
Media Channels Graphic

### MEDIA CHANNELS - APPLICATIONS



## TYPES OF OWNED MEDIA

Owned media is made up of a city's public-facing assets. Owned media is a desirable space for rolling out marketing campaigns because it is free and easy to control. The content, placement, and timing is controlled by the city. Owned media also affords the opportunity to engage with the public more creatively than through other forms of media.

Owned media includes websites and social media, including but not limited to Facebook, Twitter, and Instagram. Those are typically the total owned media assets for most companies and non-governmental array of non-traditional owned assets for distributing marketing materials, including places like the sides of sanitation trucks, mailer inserts in utility bills, and signage at libraries. Below are some examples of owned media channels to consider for your next marketing plan.

## VEHICLES ARE REAL ESTATE

Cities own and operate a variety of vehicles, from light to heavy duty. Ads on the outsides of these vehicles can be an effective way to get your message out to your audience (see Image 26). The only cost for this ad was the production of the poster. A similar ad campaign contracted to appear on the sides of buses (assuming a private media company, and not the city, owns the ad space) could cost thousands of dollars per month just to rent out the ad space.

IMAGE 26:

Sanitation Truck



When New York City was implementing their marketing campaign targeting drivers, asking them not to idle their vehicles' engines, one component of the plan was the placement of anti-idling bumper stickers on the city's fleet of more than 10,000 vehicles. The "Turn It Off" message used on the stickers was the same as the messaging used on other owned and paid advertising spaces for the campaign.

IMAGE 27:

NYPD Car with Bumper Sticker



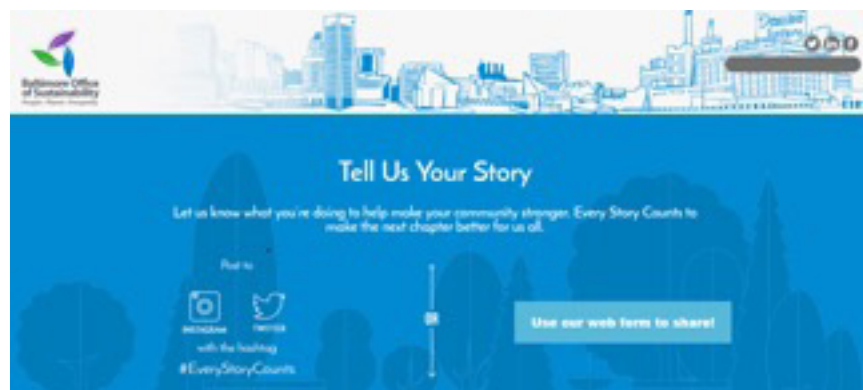
## WEBSITES, CLEANLY DESIGNED

Websites are important tools for connecting with the public. **A strong website will be simple and easy to navigate so that residents can easily find the information being provided to them, and connect immediately to visitors with the well-crafted messaging.** It is important that your website feature content related to your current behavior change campaign, and timed so that it is up and posted simultaneously with the launch and duration of the marketing campaign. All of your other marketing materials should also promote your website.

Baltimore's sustainability initiative has a website where residents can submit stories on how they are helping the community. The Baltimore Office of Sustainability's website has a clean design, and uses clear language to give visitors direction. Social media icons at the top-right corner are prominently displayed so web visitors can easily engage across Baltimore's other owned media assets.

### IMAGE 28:

Baltimore's Every Story Counts Website



## NEWSLETTERS AND EMAILS

Newsletters and email blasts are another free and easy marketing tool for cities. These formats allow for longer form content compared to a bus shelter or Facebook ad. For instance, you can include a longer description of the initiative with language targeting multiple motivators, a list of events, or a map of relevant locations around the city. Email tools can provide metrics for open and click-through rates, which are important to monitoring and evaluating your campaign's success.

### TIP:

A good tip to get even greater reach is to ask other relevant city agencies to include your content in their newsletters and emails. If you are launching a Bike to Work campaign, the transportation department, health department, and business services department can all pitch in. Reach out and provide these agencies with the appropriate graphics and content to use. The easier you make it for them, the sooner they can include it in their newsletter or email blasts to help spread the word.

## SOCIAL MEDIA ACCOUNTS

Social media is another strong and free-of-charge tool for reaching your residents. It allows for direct, consistent, frequent, and transparent engagement with city residents. Easily monitored, a strong social media presence also has the potential to create a loyal following that will not only amplify the campaign but serve as a built-in audience for future campaigns.

Social media is the most direct and instantaneous way to share your brand and build relationships with residents. Flagstaff has a very successful social media campaign that includes Facebook, Instagram, and Twitter. They built their following by engaging with high profile members of the community to share their content and reach larger audiences. They have found it successful to share images of well-known residents participating in their program (like master recycler Jim Tuck, below). Their



strong social media following is not only engaged online-over 50% of attendees at events report learning about them on Facebook.<sup>21</sup>

### IMAGE 29:

Flagstaff Recognizing Resident Jim Tuck at the Farmer's Market



### UTILITY BILL INSERTS

Including an insert about your campaign inside a customer's utility bill is another cost-effective method of reaching residents. This mechanism can be particularly helpful if there is strong geographic information to target certain neighborhoods or specific areas by zip code.

Utility bill inserts present a great opportunity to drive home the cost savings produced through energy efficiency and weatherizing, precisely when residents are reviewing their monthly costs and electricity usage. It can also be a direct method for targeting the switching over of customers from paper to online statements and electronic bill-pay methods. In Palo Alto, a bill insert for the August 2017 bill advertised free water and energy efficiency advice to recipients.

### IMAGE 30:

Palo Alto Utility Bill Insert

## SIGNAGE

Another no, or low-cost opportunity to reach audiences is through signage in public settings. These can be at city-owned/operated retail centers. If you have a volunteer team, you can also connect with relevant building operators and reach out to local businesses that will agree to put up your signage. The location of the signs should be affiliated with the campaign, but can include places like libraries, laundromats, grocery store checkouts, or any other place where people frequent as they go about their day.

## SUBWAYS/BUS SHELTERS

In some places, subways and bus shelters are managed by the local government and considered owned media. If this is the case, cities should maximize the opportunity to use this free media tool to reach a larger audience. This tool can often be targeted geographically to include media on the bus shelters or in subway stations located in specific neighborhoods or zip codes. In San Jose, for their Large Item Collection program, bus shelters were placed in neighborhoods. Mapping data for locations with the highest rates of illegal dumping was used to determine the locations for the ads, and census data was used to determine the language placement.

## TRASH CANS

There is also an opportunity to reach residents through marketing on trash cans. This is another object that many different people have cause to utilize on a daily basis, and can promote a city's campaign to recycle or reduce solid waste.

There are many more ways to use city-owned assets to create great platforms for your message. Be creative and take every opportunity to share your ideas for owned media with your peers.

## EARNED MEDIA

Earned media is a direct result of press coverage and engagement with a city's owned media. This tool is helpful to use at the campaign's outset to generate additional visibility. When it happens, earned media is one of the best ways to reach new audiences.

The most common form of earned media is press coverage for your campaign. A local newspaper might cover the launch of a new program, or an event that your team is tabling. To build a successful relationship with journalists, it is helpful to identify and build relationships with the journalists that cover news most relevant to your campaign, and to understand the best ways to reach them (via email, in person, or on the phone). Once relationships are established with media, you can alert news outlets ahead of time through a media advisory, press release, or via a brief invite that alerts the press about an upcoming event. A press release is a more detailed write-up of the event or program, and provides additional background for journalists to use in a story or interview.

In New York every year, Birdie takes a staycation to encourage a smaller travel *carbon footprint*. During the staycation, Birdie visits both famous and off-the-beaten-path sites around New York City. In one year, Birdie's Staycation was covered by a popular local blog, Gothamist (see Image 31). That coverage led to a greater awareness of GreeNYC and a larger social media following.

## IMAGE 31:

### Gothamist Story on Birdie's Staycation



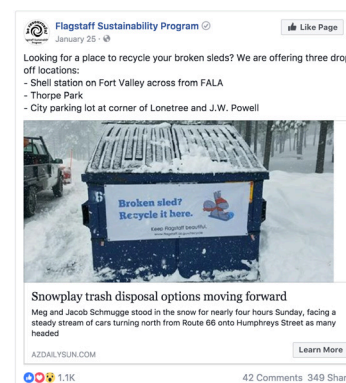
Social media is another great source of earned media. With websites like Twitter, Facebook, and Instagram, it is incredibly easy for residents to engage directly with your content by sharing, liking or commenting on it. To score earned media, cities must create engaging owned content, and develop winning strategies for getting the content picked up by online news outlets, *influencers* or regular residents through shares or re-Tweets on social media.

Flagstaff's sustainability program has a very active Facebook account, and they use Facebook Analytics to monitor public engagement. One of their most popular posts informed the public where they could recycle

their broken sleds. This was a charged topic as residents were frustrated by the tens of thousands of sleds being left by tourists in their forests and residents were eager for a solution. As we can see (below), this post not only had high views but also high levels of engagement. At the bottom of the image and along the right side, Facebook Analytics provides several metrics useful for monitoring a campaign. This post led to the Flagstaff Sustainability Program attracting 100 new followers.<sup>22</sup> Facebook Analytics reveals insights on which type of posts outperform others, informing future social media posts. Determine whether posts perform better if they include eye-catching images versus helpful advice about getting involved in sustainable actions. Test different messages and images, monitor results, and use insights to develop stronger posts (see following page).

## IMAGE 32:

### Flagstaff Facebook Post on Sled Recycling



An influencer is a thought leader or community personality with a loyal following, who has the power to promote a campaign and reach audiences that a city might not. Start with your city's mayor! Sustainable DC has a sustainability survey that Mayor Muriel Bowser Tweeted out.

The Mayor has more than 38,000 followers. If there are resources and budget limitations, leveraging earned media is a great way to market a campaign.

### IMAGE 33:

Tweet from Mayor Bowser Promoting SustainableDC Survey



Hashtags are a hash (#) symbol followed by a word or phrase that function to connect common ideas on social media. They are an effective tool for increasing engagement and reaching audiences beyond your existing followers. Hashtags can leverage your owned media to create new earned media. In Fort Collins, they created a hashtag #MyTRC (Timberline Recycling Center) to encourage residents to show appreciation for recycling and their local recycling center. The hashtag was additionally used to clarify which items can be recycled.<sup>23</sup> Fort Collins is using their owned media to facilitate earned media, and encourage greater engagement from residents.

### IMAGE 34:

City of Fort Collins Promoting “Love #myTRC” Campaign



### IMAGE 35:

Resident Participating in “Love #myTRC” Campaign



Think about using social media to cross-promote with your other owned media channels to create synergistic earned media opportunities. Use it

to create engaging opportunities for residents to generate original posts that will be seen by all of their followers. For GreeNYC’s “Stay Cozy” weatherization campaign, the full list of tips to insulate and seal homes was posted to the program’s website. Accordingly, all marketing materials also directed residents to the website that was created.

A special giveaway with several prizes was developed and promoted via social media (see image below). The giveaway incentives encouraged members of the public to review the list of weatherizing tips and post photos of themselves applying the ideas in their own homes. The giveaways became more valuable and desirable as the number of actions taken by residents increased. To reach a larger audience, posts appeared in English and Spanish (see Image 37).

This type of social media content used incentives in combination with owned and earned media to promote greater engagement with the target behavior change, and increased visibility for the campaign. Successful social media strategies facilitate and reinforce for participants the social benefits of sharing their good behaviors.

IMAGE 36:  
GreeNYC Stay Cozy Campaign Giveaway



IMAGE 37:  
GreeNYC Stay Cozy Campaign Giveaway in Spanish



IMAGE 38:  
Residents Participating in GreeNYC’s Stay Cozy Campaign





IMAGE 39:

Residents Participating in GreeNYC's Stay Cozy Campaign



IMAGE 41:

Residents Participating in GreeNYC's Stay Cozy Campaign



IMAGE 40:

Residents Participating in GreeNYC's Stay Cozy Campaign



## PAID MEDIA

Advertising—also known as *paid media*—is a mainstay tool for direct targeting and reaching large audiences not already engaged with owned assets. Because these media tools are owned by third-party media companies, a budget naturally is required for advertising through these channels. Due to the cost and market saturation (annual advertising industry expenditures top \$200 billion in the U.S. alone), it is important to be extremely strategic with paid media.<sup>24</sup> The main forms of paid media are digital, television, radio, print ads, and out-of-home. The mix of paid media channels should be determined according to target audience demographics and your budget.

## DIGITAL

Digital ads can be highly targeted and provide detailed metrics for monitoring and evaluating campaigns. Digital advertisements can be purchased for search engines, as well as social media sites

like Facebook, Twitter and Instagram. These advertisements increase visibility on platforms that targeted audiences are more likely to use, and create helpful analytics on who is engaging with the digital advertisement and how often they are engaging.

## GOOGLE ADVERTISEMENTS

Google search advertisements are displayed when certain search terms are used—they pop up at the top of the search results. Google display advertisements are the ads that you see on many websites that include image or text you have to scroll past in order to see your true search results. Or you may see them as a banner ad or panel advertisement around a website's landing page.

Google ads are a strong tool for campaigns with a digital call-to-action—asking people to use an online tool, for example, to opt out of receiving unwanted, wasteful bound-paper telephone directories. More convenient to audiences (and cheaper) than a highway billboard, respondents wishing to opt out of receiving phone books do not have to remember a telephone number or website to access later on, since they are already looking at the ad—now just one click away from participating in the action. Google advertisements allow you to select very specific target audiences, including such specific targets as people who are outdoor enthusiasts or pet lovers or both.

## SOCIAL MEDIA ADVERTISEMENTS

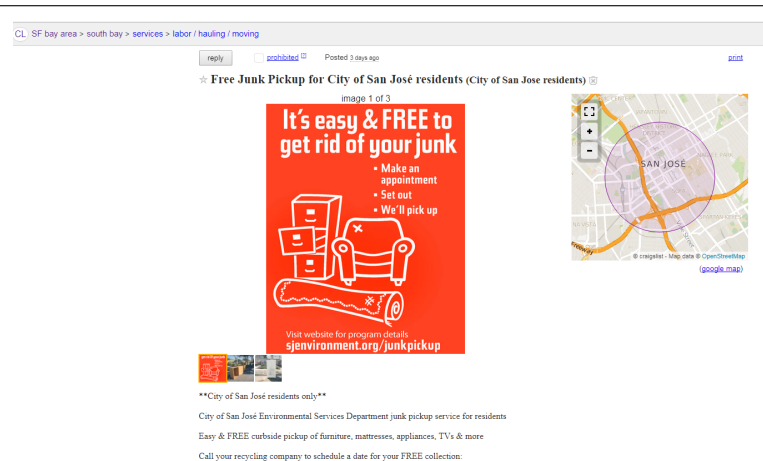
Your owned social media channels reach only those who follow your campaign pages, of course, whereas paid social media ads allow you to reach a much bigger, more highly targeted audience. Social media ads are displayed in the feeds of various social media platforms. So as a user scrolls down through their Facebook newsfeed, Tweets, or Instagram photos, they scroll past advertisements, too.

Everything from attitudinal and behavioral profiles to demographic research constitutes important inputs for the algorithms governing social media ads. For example, an ad could be targeted toward populations that live in Downtown Phoenix, follow their local farmer's market, and like a cleaning products made from sustainable ingredients. After setting up a campaign page or account, the site walks you through the process for purchasing and targeting advertisements targeting these social media accounts. Additional guidance is provided in the Additional Resources section below.

## OTHER DIGITAL MEDIA

For San Jose's Junk Pickup program, it made sense to share their advertisements on Craigslist where residents were buying and selling used furniture. Residents using Craigslist to search for hauling services in the South Bay would automatically be made aware of this free service.<sup>25</sup>

IMAGE 42:  
Craigslist Advertisement



## NATIVE CONTENT

Native advertising refers to when an ad is blended into the existing content of a website. This includes but is not limited to text, images and infographics. The goal is for the advertising not to disrupt the user's experience with the site. Rather, it is a stronger alternative to pop-up or banner ads. This can include a sponsored post that discusses the importance of energy efficiency, or paying to promote a hashtag that will show up in relevant trending topics. The example below is of a native ad in the environmental blog Grist. Blended within the blog's articles is a sponsored advertisement about businesses and sustainability.

### IMAGE 43:

Native Content - Screen grab from environmental blog



#### Agriculture for a Warming Planet:

See how climate change has already begun to threaten the future of some of our planet's most popular cash crops, like coffee and bananas.



#### Sponsored: Green Jobs

Are you interested in joining the green jobs sector with one of America's fastest growing companies?



#### Chemicals:

How clean is "clean"? Find out what nasty chemicals are lurking in beauty products claiming to be "natural"



#### Wildlife:

Climate change and habitat loss are the leading causes of our planet's first human-caused mass extinction. Learn how you too are being affected.

## TELEVISION

Television ads can reach a large audience, but come with high costs for airtime and production. If your research shows that the best media channel for reaching a specific audience is through television advertising, and if you have the budget, this is a good option to consider. If you can find a local TV station that will provide you with pro bono space at a reasonable time when people are more likely to see the ads (i.e., not the overnight slot), and the audience is a good fit for your campaign, you might be able to air TV ads for only the spot's production costs.

## RADIO

Similar to TV, radio ads have the potential to reach a large audience. And like TV sales reps, radio station sales staff can provide their audience demographic and psychographic data to help you better understand whether their audience is a good fit for your audience goals. Radio ads can be expensive. If you want to break through and connect with your audience you need to have a lot of frequency. Again, check with stations to see if they offer free spots for public service announcements during daytime or early evening hours.

#### TIP:

If you do decide to move forward with a radio ad buy, it is far better to use your budget for a shorter buy with more spots airing per day than a longer buy that is drawn out over many weeks with only a few spots airing per week.

## PRINT

There are still some audiences who primarily receive their news through print media. Bear this in mind when you look at the demographic information associated with publications that you are considering; make sure they match your audience targets. If you move forward with an ad buy, look for full-page placements on the right-hand side of a full page toward the front of the publication to get the most eyes.

## OUT OF HOME

One subset of paid media is known as *out-of-home media*, which includes advertisements we encounter when moving from one place to another (i.e., between home and work). They include ads appearing on bus shelters, on the inside and outside of city buses, park benches, subway platforms, inside subway cars, billboards, and so on. In some cities, locations in this category are owned by the city, and can be used for free. In other cities, the advertising for these channels is operated by third parties, and the space must be rented at a cost.

Denver had an innovative approach to making the bus shelters feel more interactive and engaging. They created 3-dimensional ads that were easy to grasp and were eye-catching.

### IMAGE 44:

Denver Bus Shelter



#### TIP:

When crafting your messaging for a media channel, always consider the duration of your audience's interaction with that channel. Someone driving by a billboard may only have a few seconds to absorb your message. Someone else waiting at a bus stop may have 15 seconds or upwards of several minutes. This does not mean the bus ad should be full of text. It means that the billboard should be very clear and to the point.

## ADDITIONAL MARKETING TACTICS

#### TIP:

There are constantly new technologies emerging, but cities should not feel pressured to use the same media tools as all of the other cities if these do not meet the objectives of the campaign. For example, virtual reality can be a very exciting tool, but may not make sense for your goals. This should not discourage you from developing innovative tools, however. It is important that cities do not fall into the trap of implementing status quo campaigns.

**Use media that meets the objectives for the campaign and that make sense for what is trying to be achieved.**

## EVENTS

Local events are another opportunity to reach a targeted audience, such as specific neighborhoods and special interest groups. Events provide residents with opportunities to learn more about the campaign, and to pick up materials associated with it. Setting up a table at events organized by other third parties is a great way to benefit from pre-existing infrastructure and event promotion.

When displaying at an event, the audience should be kept in mind as you plan what you display, how you display it, and how staff are trained to message about it. The table should have clear branding (tablecloth, sign, tent) so people can easily identify your campaign. Instead of giving away flyers, consider asking residents to take a pledge of action in exchange for a free giveaway. People are more likely to follow through and participate when a written or verbal commitment is made.

Instead of handing out free reusable bags or mugs, GreeNYC asked residents to pledge to stop using disposable plastics, like water bottles and plastic bags, before receiving a bag or a mug. To date, more than 40,000 New Yorkers have taken the B.Y.O. Pledge online and at events to reduce plastic consumption by carrying reusables (see Image 45).<sup>26</sup>



IMAGE 45:

GreenNYC Table at Green Market



Events should be aligned with the values of the campaign. These can include green markets, sustainability education events, or events held by other city agencies. Baltimore's sustainability champion, Turtle, comes out to Baltimore's Farmer's Market, engaging the residents of Baltimore to think about sustainability and community resilience.

IMAGE 46:

Encouraging the Use of Reusable Bags at the Tacoma Farmer's Market



In Tacoma, their sustainability office promotes their appearance at the local farmer's market and encourages resident engagement by providing reusable bags.

IMAGE 47:

Baltimore Sustainability's Mascot Turtle at the Baltimore's Farmers Market



## GIVEAWAYS

Free giveaways of useful items, like reusable bags and water bottles, are far more engaging than flyers, and can help prompt residential participation in the target behavior change. Similar to earned media, when people have and use promotional merchandise with the campaign's branding and messaging, a wider audience is reached, potentially reaching people not previously reached through the other media channels. These materials can be distributed at events or tied to a campaign as a special incentive. Periodically pause to consider whether and how promotional items can be used to promote your campaign, and possibly also the behavior change itself.

### IMAGE 48:

GreeNYC B.Y.O Bottle Giveaway



Promotional materials should only be developed only if it makes sense for the campaign. Not every campaign needs them. Promotional items should be determined based on the target behavior change, budget, and means of distribution. A poor use of resources would be to order promotional items without having distribution plan, or some other mechanism, for getting them into the hands of residents.

It is also unhelpful to order cheap, low-quality items that will fall apart and quickly end up in the waste stream. Giveaway items should be of good quality. Depending on the campaign and budget, you can consider water bottles, reusable shopping bags, flash drives, or other useful items that are consistent with the overall brand strategy of the campaign. Giveaways should build brand equity and not damage it.

For GreeNYC, it was important that the giveaways have function, strong design, and be of high quality to ensure that residents would take and really use the items. Any item considered was kept on-brand and within the campaign mission. All of the GreeNYC materials featured Birdie's image on them.

## PROMPTS

A prompt is another media tactic that encourages positive green behavior by the way of friendly, very visible reminders. Prompts can come in many forms—email signatures or cute stickers with little reminders to print only what's necessary affixed near printers, or an appeal to switch off the light placed near a light switch. (See GreeNYC's light prompt on the following page).

**IMAGE 49:**

GreeNYC Light Switch Timing



People are inundated with exposure to hundreds of advertisements every day. In order to break through the noise, it’s important to connect repeatedly with a variety of media tools. Campaigns should be focused around a launch date where all owned, earned, and paid media enter the market at the same time. It is as important to have the right mix of media and tactics as it is to employ the right timing when coordinating and executing publicity efforts across different media channels.

**TIP:**

It is important for a person to engage with your campaign multiple times to encourage behavior change. If the paid media tools can complement each other, a person might see an advertisement on the side of their bus when it arrives, again when they transfer to the subway, see the billboard coming out of the station, and come across the campaign on Facebook.

Campaign length must also be considered. The longer a campaign can stay in the market the better. Ideally, campaigns should run for a least a month at a time and then repeat themselves every year (see Figure 9 for an example of a ten month timeline). Behavior change does not happen overnight so repeated and ongoing exposure helps audiences see the

advertisements and connect with the messaging tailored to engage them. There should be breaks between marketing campaigns, to avoid campaigns competing for attention. It is recommended to plan and execute four behavior change campaigns per year. Below is an example from San Jose’s Junk Pickup campaign that lists media tactics and timing.

**FIGURE 9:**

San Jose Marketing Timeline, City of San Jose Environmental Services Department

Outreach tactics: Junk Pickup											
Tactic	Free pickup pilot										
	2015			2016							
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	
Webpage	X	X	X	X	X	X	X	X	X	X	
Email to council districts	X										
Social media posts (Facebook, Twitter, Instagram)	X	X	X	X	X	X	X	X	X		
Nextdoor		X	X	X	X						
CITP "dasher board" at ice rink		X	X	X	X						
Print ads in neighborhood papers			X	X							

**MARKETING PLAN**

At this point, you will want to pull together all the work from the steps listed above and in previous sections, and put them into one cohesive plan (refer to the Marketing Plan Template). A marketing plan should guide the implementation and be shared with senior leadership and stakeholders. A marketing budget, developed in conjunction with the marketing plan, will help you plan for and track the projected and actual expenses for the campaign. Templates for marketing plans and budgets are provided at the end of this section.

For a summary of key takeaways from this section, please refer to the *Quick Guide*.

# Marketing Tools: Media Planning and Beyond - Marketing Plan Implementation Worksheet

A Marketing Plan is a document that walks through the details and implementation plan of the campaign. It can be shared with senior leadership and stakeholders. Complete each step below to develop a plan for every new behavior change campaign.

<b>1. DEFINE GOAL</b>	
Goal setting at the outset of a campaign helps ground the other components of the campaign, as they will all be developed with the intention of meeting the specified goal. In order for goals to be effective they should be as detailed as possible (e.g. reduce residential paper waste by 2% in 12 months). A goal that is too general can be difficult to measure.	
<b>2. CAMPAIGN BACKGROUND</b>	
Provide the context for why this campaign is important. You can use data from your targeted behavior change to complete this section.	
<b>3. AUDIENCE</b>	
Based on available audience identification analysis and research, describe the target audience(s) for this campaign.	
<b>4. MESSAGING AND DESIGN PLAN</b>	
List messaging strategies. Given the target audience and the defined goals, what messaging will you use? What elements of motivators can you capture in the design? What information about your target audience's attitudes and behaviors can help craft the messaging for the campaign? What audience motivations will you speak to?	



# Implementation Worksheet (cont.)

<b>5. MEDIA PLAN</b>	
Describe the media plan. Determine what types of media tools will be used for this campaign. Start by listing your city's existing owned media assets and add strategies for earned and paid media. Use target behavior and audience research to determine the best channels.	
<b>6. CAMPAIGN TIMING &amp; TIMELINE</b>	
Describe when the campaign will be launched and for how long it will run. Explain why those decisions were made.	
<b>7. MONITOR THE CAMPAIGN</b>	
To monitor the campaign while it is running, determine what metrics will be used for monitoring. Which media channels are being used? How will they be monitored?	
<b>8. EVALUATE THE CAMPAIGN</b>	
Determine what metrics will be used to evaluate the success of the marketing plan against the campaign goal. How many people saw the campaign? How many new followers were gained? Were attitudes changed? Were behaviors changed? Was there a measurable environmental impact?	
<b>OTHER NOTES</b>	

## Marketing Tools: Media Planning and Beyond - Media Plan

# Implementation Worksheet

Use this tool as a guide to map out a media plan. Depending on the budget, consider which combination of media makes sense for a campaign, and how long that campaign should run. Some examples are included, but you should focus on the channels that you identified for the specific campaign. The spreadsheet template is [linked here](#).

Item - Description	Start Date	End Date	Quantity (If Applicable)	Media Cost/Month	Production Cost	TOTAL
<b>OWNED MEDIA</b>						
Vehicles (e.g. Sanitation Trucks, Police Cars)						
Website						
Newsletters/Email Blasts						
Social Media						
Instagram						
Facebook						
Twitter						
Other Social Media						
Utility Bill Inserts						
Signage						
Subways/Bus Shelters						
Trash Cans						

# Implementation Worksheet (cont.)

Use this tool as a guide to map out a media plan. Depending on the budget, consider which combination of media makes sense for a campaign, and how long that campaign should run. Some examples are included, but you should focus on the channels that you identified for the specific campaign. The spreadsheet template is [linked here](#).

Item - Description	Start Date	End Date	Quantity (If Applicable)	Media Cost/Month	Production Cost	TOTAL
<b>EARNED MEDIA</b>						
Press						
Social Media						
Instagram						
Facebook						
Twitter						
Other Social Media						
<b>PAID MEDIA</b>						
Google Advertisements						
Social Media Advertisements						
Facebook Ads						
Twitter Ads						
Instagram Ads						
Native Content						

# Implementation Worksheet (cont.)

Use this tool as a guide to map out a media plan. Depending on the budget, consider which combination of media makes sense for a campaign, and how long that campaign should run. Some examples are included, but you should focus on the channels that you identified for the specific campaign. The spreadsheet template is [linked here](#).

Item - Description	Start Date	End Date	Quantity (If Applicable)	Media Cost/Month	Production Cost	TOTAL
<b>PAID MEDIA</b>						
Television						
Radio						
Print						
Out-of-Home						
Bus Shelters (May also be owned)						
Buses						
Subways/Metro						
Billboards						
<b>TOTAL</b>						



# Marketing Tools: Media Planning and Beyond

## Implementation by Budget

### No Budget

- Use existing research to develop the marketing plan
- Use the Worksheet above as a starting point to create an inventory of all of the city-owned media to which you have access
- Review the list and determine which assets are the best fit for your campaign. Keep in mind that even if you are not paying for the space, some channels like bus shelters and sanitation vehicles will have costs for printing the posters. If you have absolutely no budget avoid channels that require the production of printed materials. Focus, instead, on digital media tools and securing earned media

### Low Budget

- Review your campaign goal along with your audience and messaging objectives to identify the best owned media tactics for your marketing plan
- If there are high priority audiences that are not being reached by your owned and earned media, consider using a small, paid media campaign to reach them

### Optimal Budget

- Hire a media firm to help with the planning, buying and monitoring of your paid media effort. A media agency can sometimes get better rates and even bonus time based on the volume of business and long-standing relationships. They can help you develop the strongest plan based on your resources, campaign goals, and audience data. Agencies will either take a percentage of your overall media budget or bake their fees into the prices they give you for the various media channels they will purchase on your behalf
- If you are able to use an agency through an existing city contract, make sure the firm demonstrates that their media plan is tailored to your audience and goals



### ADDITIONAL RESOURCES

**George Washington University's Media Planning Guide:**

[https://smhs.gwu.edu/cancercontroptap/sites/cancercontroptap/files/MediaPlanningMediaRelationsGuide\\_FINAL.pdf](https://smhs.gwu.edu/cancercontroptap/sites/cancercontroptap/files/MediaPlanningMediaRelationsGuide_FINAL.pdf)

To purchase **Google Advertisements**, Google has a very clear and easy-to-follow tutorial to setup an account and begin purchasing search and display advertisements, <https://www.google.com/ads/>

For a helpful tutorial on purchasing advertisements on **social media**, **Hootsuite offers a handy guide:** <https://blog.hootsuite.com/social-media-advertising/>

This is a helpful guide for **how to purchase television ads:**

<http://smallbusiness.chron.com/buy-local-tv-ads-41137.html>

This is a helpful explanation of **how to buy radio ads:**

<https://www.inc.com/guides/2010/09/how-to-buy-radio-advertising-on-a-budget.html>



Analyze  
Campaign  
Effectiveness

## ANALYZE CAMPAIGN EFFECTIVENESS

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Successful marketing for action campaigns have a built-in strategy for monitoring and evaluating the success of each behavior change outreach effort. Gathering data to know how your campaign is performing along the way will, in many cases, afford you opportunities to make adjustments to areas that are underperforming, and also to boost those channels where you have demonstrated success.

Tools needed to gauge a campaign's performance are often embedded right into the marketing materials themselves. **Monitoring and evaluation tools should be identified while the campaign is still in the planning stages.** This section will discuss which aspects of the campaign you should be monitoring, as well as how to develop good metrics for measuring the success of the campaign.

### MONITORING

Monitoring refers to the parallel function of following your campaign closely, while it is in process and running, and collecting data to measure its performance. Monitoring a campaign allows managers to track how residents actually engage with the various media channels, varied forms of messaging, and any other tactics you decide to employ.

During the design and media-planning phases, you will want to determine the metrics most applicable to monitoring your campaign. Use the implementation worksheet on pages 80-81 to identify metrics for all elements of the campaign. You should also revisit your campaign goals for insights on specifically what you want to monitor. Look at public responses to calls-to-action as strong metrics—did people take an online pledge, subscribe to the newsletter, sign an online petition, sign up for campaign alerts, or visit a special landing page on your website? Metrics can include click-through rates and engagement for digital ad buys, website analytics, and participation statistics collected at campaign events.

Once a campaign has been launched, it should be monitored and adjusted where possible to maximize reach and effectiveness. If the events are successful, and people are more engaged in person but the social media strategy is falling flat, then more dedicated resources can be moved over to events. Simultaneously, some adjustments can be made to the social media to improve engagement. If you were not able to run A/B testing (discussed in *Craft Messaging & Campaign Design*) before the start of the campaign, consider running it now. Certain media channels lend themselves more easily to making adjustments mid-stream in case something is not connecting with your audiences. Depending on which media channels you selected, there could still be opportunities to shape it up and improve engagement, or even shift resources over to another channel where your message is performing better. Digital ads can be adjusted almost immediately, whereas billboards are obviously tied to a specific, time-bound contract period. Thus it makes sense to use the medium best suited to the stage your campaign is in: digital ads early on, followed by billboards once the data have confirmed your message's effectiveness with your audience.

San Jose, for example, found great success identifying their most effective messaging using A/B testing. The city utilized a postcard mailing to residents in an effort to reduce illegal dumping. Some households received a postcard explaining how to correctly dispose of large items; other households received a postcard informing them that they were specially selected to participate in a free large-item removal program. After a nine-month pilot, San Jose found households that received the postcard containing instructions on proper disposal showed a 75% increase in large-item collections. But households that received a postcard announcing their selection for a special, free program saw a whopping 150% increase in large-item collections. The success of this pilot actually led the San Jose City Council to expand their large solid-waste program to a twice-per-year collection.<sup>27</sup>



## EVALUATION

Even after the campaign is over, conducting a thorough evaluation of its performance will help inform your future efforts. If a campaign is not as successful in achieving action as you had hoped, there is still tremendous value located in your metrics that will help in understanding what failed to connect.

To evaluate your campaign, gather all of your media metrics, call-to-action indicators, and survey data in case you were able to conduct surveys before, during, or after the campaign. Metrics can cover a range of public interactions with your campaign and even their reactions to it. Consider measuring how many people saw your campaign, engaged with it, changed their attitudes because of your campaign, or were motivated to change their behavior in some way as a result.

## IMPRESSIONS

Media impressions are a broad metric for owned, earned, and paid media. Impressions capture the number of times people are exposed to your ads—the number of people who drive by a billboard, scroll past a Twitter ad, or are listening to the radio station when your ad plays. Those impressions are calculated in various ways depending on the channel. For example, billboards have road counts that calculate how many vehicles drive past the billboard. Impressions can also include website traffic or how many people saw a Tweet. Figures for media impressions are acquired separately from each platform.

Campaign metrics are vitally important tools. Hard data can help you learn lessons about what went wrong or, when things go right, your data can be used to propel fundraising efforts. If your campaign encouraged people to compost and, at the end, compost rates remained unchanged, you can examine the media tools used, the tone of the messaging, or the interactions via social media platforms for clues on what may not have

worked. If a campaign went well, that strategy can be replicated again in the future. In this case, analyze all the various components to see which channels, resources, and engaged audiences yielded the greatest results. Better data will help you justify and secure additional resources for your program.

## ENGAGEMENT

Measuring engagement for your campaign means counting how many people interacted with your campaign, and how often they interacted. This includes counting the number of people who clicked on a link in a newsletter, shared your web link on social media, or signed a pledge to recycle. Engagement with the campaign can be measured against your campaign goals, which might be to gain 100 new followers or to encourage 500 new people to sign a pledge.

For their Junk Pickup campaign, San Jose captured the media impressions and engagement (clicks) from digital advertisements over the entire course of their campaign. Note that these metrics equipped them with the ability to compare different channels and languages used, tracked over the years and broken down by the associated per-click cost (see figure 10 on the following page).<sup>28</sup>

FIGURE 10:

San Jose Metrics, City of San Jose Environmental Services Department

	FY15-16		FY16-17		
	Google Adwords	Mercury News Digital Ads	Google Adwords	Facebook Ads - English	Facebook Ads - Spanish
<b>Impressions</b>	23,850	183,349	63,400	96,762	77,884
<b>Clicks</b>	1,684	425	6,020	5,967	4,321
<b>CTR</b>	7.06%	0.23%	9.50%	6.17%	5.55%
<b>Cost per click</b>	\$1.19	\$4.71	\$0.50	\$0.34	\$0.46

In Fort Collins, for the Lose-A-Watt Energy Prize energy saving competition, the city tracked various metrics to measure the impacts of their multi-media marketing campaign over three months (see below). Learn more about the campaign and metrics at <http://lose-a-watt.com>.<sup>29</sup>

FIGURE 11:

Fort Collins Lose-A-Watt Metrics, City of Fort Collins

Metrics	Drivers
Impact	<b>4.7 Million People</b>
Engagement - Website Visitors	<b>24,000 Unique Visitors</b>
Engagement - Clicks	<b>8,000</b>
Cost per Thousand Impressions	<b>\$1.82</b>
Environmental Impact - CO2 Emissions Reductions	<b>8.48 Tons</b>
Financial Savings/Energy Savings	<b>\$2.8 Million</b>

## ATTITUDES

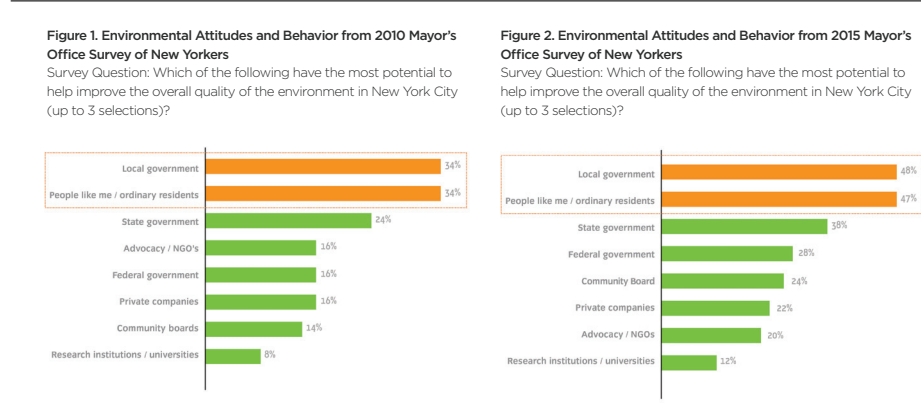
For your behavior change campaigns, measuring total public awareness, and whether and how residents' attitudes shift over time, are important metrics for understanding the success of your campaign. When the campaign changes how someone feels about reducing waste or how they view their own role in achieving sustainability, it can lead to real and widespread behavioral change.

A great way to measure attitude change is through the use of surveys or social media scans. For surveys, ideally one survey should be circulated beforehand and another one after the campaign. In addition to questions that are specific to the campaign, add questions that are relevant to monitoring general environmental attitudes over time. These could include attitudes towards waste, energy, your branding, how the environment ranks as a priority over other urban concerns like affordable housing, employment, etc. See example of one attitude toward environmental responsibility being tracked by NYC over time below. A social media scan includes looking for the use of any keywords or hashtags associated with the campaign. Has there been any increase since the campaign launch? Did the survey demonstrate any change in attitudes?



FIGURE 12:

Environmental Attitudes and Behavior from Small Steps, Big Strides.  
Insights from GreeNYC: The City of New York’s Behavior Change Program

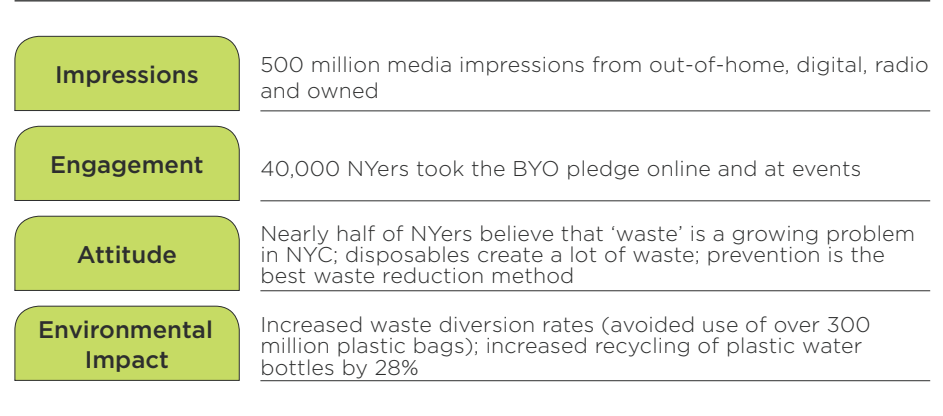


ENVIRONMENTAL IMPACT

When you evaluate the environmental impacts of your campaign, you are looking at the behavior change goals determined at the outset, and measuring whether there was a significant impact. Depending on your goal, the impact can be measured in terms of tons of recycled materials diverted from the waste stream, reductions in GHG emissions, or increases in bicycle ridership. These metrics should be measured against the quantifiable campaign goals and methodology established during the campaign’s development.

GREENYC’S EVALUATION OF THE BYO CAMPAIGN

FIGURE 13: GreeNYC BYO Campaign Evaluation, Small Steps, Big Strides.  
Insights from GreeNYC: The City of New York’s Behavior Change Program.



Given all the data on which aspects of the campaign performed well and which performed poorly, the final step is to determine what approaches you wish to retain for future campaigns, and which ones can be reworked or done in a different way moving forward.

For a summary of key takeaways from this section, please refer to the [Quick Guide](#).

## Analyze Campaign Effectiveness

# Implementation Worksheet

The tool below will help to support the monitoring and evaluation of your campaign, help track goals and metrics as you monitor the campaign, and includes an additional worksheet to evaluate the impact of a campaign after it is done.

Campaign Goal(s)	Environmental Action	Audience	Metric	Timeline	Attitudes Changing? How So?	Behavior Changing? How So?
Reduce residential paper waste by 5%	Reduce paper waste by signing up to opt out of unwanted catalogs and other mail	Residents	Sanitation department data for tonnage of residential waste	1 year	Yes, the campaign hashtag is trending, and people surveyed identify reducing paper waste as a priority	10K residents signed up to opt out resulting in reduction of 8,000 tons of paper waste

Analyze Campaign Effectiveness

# Implementation Worksheet (cont.)

The tool below will help to support the monitoring and evaluation of your campaign, help track goals and metrics as you monitor the campaign, as well as another worksheet to evaluate the impact of a campaign after it is done.

The spreadsheet template can be accessed [here](#):

Media Channel - Description	Start Date	End Date	Message	Impressions	Clicks	Click Through Rates	Cost Per Click	New Followers	Website/ Newsletter Sign Ups
<b>OWNED MEDIA:</b> (Example: Mayor's Office Email Blast)									
<b>EARNED MEDIA:</b> (Example: Office of Environment Twitter Handle Engagement)									

## Analyze Campaign Effectiveness

# Implementation Worksheet (cont.)

The tool below will help to support the monitoring and evaluation of your campaign, help track goals and metrics as you monitor the campaign, as well as another worksheet to evaluate the impact of a campaign after it is done.

The spreadsheet template can be accessed [here](#):

<b>PAID MEDIA:</b> (Example: Bus Shelter ads)									
<b>OTHER MEDIA TACTICS</b>									

# Implementation by Budget

## No Budget

- Assign metrics for every media channel and marketing tool that you use that capture one or more of the key indicators of impressions, engagement, attitudes and behavior change
- Use implementation worksheet to identify these metrics. Metrics for owned media such as website traffic and click through rates from email blasts should be readily accessible
- Free survey tools coupled with owned media can be used to gather insights for attitudes and behavior
- Conduct data analysis in-house

## Low Budget

- Assign metrics for every media channel and marketing tool that capture one or more of the key indicators of impressions, engagement, attitudes and behavior change
- Use implementation worksheet to identify these metrics
- Free survey tools coupled with owned media can be used to gather insights for attitudes and behavior
- Conduct data analysis in-house
- Hire a contractor to fill gaps in your data, synthesize and analyze your data
- Purchase helpful existing data sets (e.g. Nielsen retail data)

## Optimal Budget

- Hire an outside consultant to develop a framework to monitor the campaign's performance, including all research, survey design and development as well as provide a detailed analysis on individual campaign tactics and overall campaign success



## ADDITIONAL RESOURCES

**Knowhow Nonprofit** identifies metrics for monitoring and evaluation, and points to helpful tools to assist with monitoring and evaluation.  
<https://knowhownonprofit.org/campaigns/campaigning-and-influencing/developing-your-campaign-strategy/evaluating-the-impact-of-your-campaign#>

**The University of Kansas Center for Health and Community Development** has a helpful discussion on monitoring social marketing campaigns:  
<http://ctb.ku.edu/en/table-of-contents/sustain/social-marketing/monitor-progress-make-adjustments/tools>

This site provides and helpful discussion on **metrics for online media tools**:  
<http://contentmarketinginstitute.com/2012/10/measuring-marketing-effectiveness-metrics/>

Although this **UN Women** site is geared towards human rights campaigns, it provides a very helpful framework for developing monitoring and evaluation metrics for campaigns:  
<http://www.endvawnow.org/en/articles/1305-what-is-monitoring-and-evaluation.html?next=1307>





# About Vision Flourish

[visionflourish.com](http://visionflourish.com)

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Vision Flourish is a marketing consultancy dedicated to working with municipal governments and nonprofits to develop strong, sophisticated, and successful marketing programs. Our services include research, marketing strategy, brand development, messaging, and media planning and buying. Vision Flourish takes a data-driven, multi-disciplinary approach to crafting effective campaigns for clients in the governmental and nonprofit sectors. Drawing on a deep knowledge of these sectors, Vision Flourish solutions are resource-savvy and strategized to navigate each sector's pressures and constraints while seeking to leverage their skills and experiences.

# About Roya Kazemi

President of Vision Flourish | [roya@visionflourish.com](mailto:roya@visionflourish.com)

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Roya Kazemi is a globally recognized leader in using marketing strategy to promote large-scale urban sustainability. She is a seasoned marketing professional who has led marketing campaigns for major corporate brands, including HBO, Smirnoff, Toyota, Ultra Records, and Virgin Records. She has devoted the last decade of her career exclusively to engaging various audiences to advance urban sustainability and environmental quality. In 2009, Mayor Michael Bloomberg's office tapped Ms. Kazemi to be New York City's first Director of GreeNYC, a startup marketing program dedicated to helping the city achieve its ambitious sustainability goals. In that position, Ms. Kazemi appealed to the city's more than 8 million residents through an engaging, citywide marketing campaign that mobilized New Yorkers to take easy, meaningful steps to live more sustainably. She developed and implemented the program's comprehensive marketing strategy, managing every step of the process, from conceptualization, messaging, and media planning to fundraising, forging partnerships, and the monitoring and evaluation of the campaign's success.

Ms. Kazemi was so inspired by this work and the potential impacts of local governments to address climate change that she decided to launch her own company, Vision Flourish, to apply these experiences beyond New York City government.

# Glossary

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**A/B TESTING** - A method used to determine which messaging will be more successful by releasing two variations of a message at the same time to two different audiences and measuring relative performance. Ideally, the test messages have only one variation (design or wording, not both), making it easier to narrow down the reason one message is more successful than another.

**BASELINE** - A starting point used to make comparisons meaningful. Baseline measurements are helpful when monitoring or evaluating a behavior change campaign to determine growth, change, or any other performance metrics.

**BRAND AUDIT** - To conduct an inventory of existing assets within the purview of the city that might have any program identification on them to help inform branding development.

**BRAND IDENTITY** - All of the components (e.g., logo, tagline, color scheme, font) that are related to your program's mission, identity, commitment and vision for the future.

**BRAND EQUITY** - The added value that your brand brings to a specific, local sustainability behavior change program, campaign, event, or in terms of its value to the municipality as a whole.

**CALL-TO-ACTION** - Language that encourages the audience to take an immediate specific action.

**CARBON EMISSIONS** - Carbon dioxide is the principal greenhouse gas emitted through human (anthropogenic) activities.

**CARBON FOOTPRINT** - A measure of the total amount of carbon dioxide and/or carbon dioxide-equivalent emissions associated with the lifecycle of a product, project, facility, transportation network, organization, individual, city, etc. over a given period of time.

**CLICK-THROUGH RATES (CTR)** - The number of clicks a link receives divided by the number of times your link is shown in an email, newsletter or website.

**CONTENT** - This consists of the text, images or graphics included in a campaign.

**EARNED MEDIA** - Your original media (owned media) that is shared by other respected outlets and amplified.

**ENVIRONMENTAL BEHAVIOR CHANGE** - Changing habits around sustainable actions such as recycling, driving less, etc.

**GREENHOUSE GAS (GHG)** - A group of gases that contribute significantly to the greenhouse effect by absorbing infrared radiation and trapping heat in the planet's atmosphere, causing global climate change.

**GREENYC** - New York City's environmental behavior program, which aims to educate, engage and mobilize New Yorkers to support the goals of PlaNYC. This guidebook's author, Roya Kazemi, directed GreeNYC from 2007-2015.

**INFLUENCER** - A respected thought leader or local icon with a loyal following, who can promote a campaign that reaches audiences a city might not otherwise be able to reach on its own.

# Glossary (cont.)

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**INFOGRAPHIC** (Information graphics) - Visual representation of data used to illustrate a key trend.

**LOGO** - A symbol or distinct lettering positioned as a quintessential element of the branding of a program or campaign.

**MEDIA** - Mass communication usually disseminated through print, television, radio and digital means.

**MEDIA CHANNELS** - The ways in which messages reach the public.

**MEDIA IMPRESSION** - An interaction of a radio, online, TV, print, or out-of-home (billboard, subway, bus) advertisement with an audience member through that medium.

**MESSAGING** - Messaging is the communication tool (i.e. language, tone, length) used to inform, engage, and/or influence local residents.

**MONITOR** - To track the performance of a campaign using a set of logical metrics.

**METRICS** - Indicators used to measure the progress or evaluate a campaign by gathering existing and new real-world data through a variety of means.

**NUDGE** - An approach to motivate behavior by presenting choices in such a way as to present the desired choice as the best possible option.

**OUT-OF-HOME MEDIA** - Media tools that are seen in public (billboards, bus shelter ads, etc.)

**OWNED MEDIA** - Media that is created and managed by the organization or city.

**PAID MEDIA** - Also known as advertising, this includes digital, television, radio, print and out-of-home media.

**PARIS AGREEMENT** - The Paris Agreement (also known as The Paris Accord) is a plan that was adopted at the United Nations Framework Convention on Climate Change Conference in Paris in 2015. This climate deal includes commitments from 195 countries to keep global temperature increases this century below two degrees celsius.

**PRIMARY RESEARCH** - Gathering of new information that can include surveys and focus groups.

**PROMPT** - A media tactic that encourages positive green behavior via friendly, very visible reminders, such as texts or signs with convenient reminders.

**REBRAND** - A brand where major elements are changed to express a new direction or identity for the program.

**SECONDARY RESEARCH** - Gathering information from existing studies or reports.

**SEGMENTATION ANALYSIS** - The process of grouping audiences into discrete categories based on marketing data, such as demographics, green behaviors or attitudes, and economic information.

# Glossary (cont.)

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**SOCIAL MEDIA** - A form of owned media, this refers to online platforms where original content can be shared alongside opportunities to engage directly with residents.

**STAKEHOLDERS (Environmental)** - A group of residents, organizations, government agencies, and private companies that are impacted or invested by environmental behavior change campaign.

**SURVEY** - A series of carefully phrased questions designed to elicit specific information in the taker's responses.

**TARGET AUDIENCES** - Specific groups of people for whom a campaign is intended.

**TONE** - The character or attitude behind a message.

**TRIPLE BOTTOM LINE** - A way to account for success that goes beyond measuring a financial return on investment. The Triple Bottom Line includes social and environmental benefits to measure success.

**URBAN SUSTAINABILITY DIRECTORS NETWORK (USDN)** - A network of local government professionals from US and Canadian cities working to create a healthier environment, economic prosperity, and increased social equity.

**WEATHERIZE** - To protect a building from external elements, particularly sunlight, precipitation and wind, with the goal of saving on heating and cooling energy costs.

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## FIGURES

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### IDENTIFYING TARGET BEHAVIORS

**Figure 1:** GHG Emissions Diagram GreeNYC, New Yorkers' Contributions to a Greener, Greater City: A Behavioral Impact Study

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