

# **MEASURING THE IMPACT OF SOCIAL MARKETING AND OUTREACH**

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## **ABSTRACT**

By design and practice energy conservation, efficiency and renewable programs aim to change behavior. There are often rigorous protocols used to evaluate the process the programs follow as well as their impact in energy savings.

Activities like outreach and education on the other hand, are often dismissed as indirect and deemed too hard to measure. In this work, we'll share a case study including design, implementation and results of a feedback program that directly measures the impact of a social marketing and outreach program that moves participants along a hierarchy or continuum, ultimately ending in behavioral change.

Unlike mainstream marketing, which is designed to promote the purchase of a specific product or service, social marketing often has invisible or intangible benefits. The techniques of social marketing (the use of marketing tools to achieve specific behavioral goals for a social good) offer the means to motivate customers to make long-term commitment to change. Social marketing has been used to educate consumers that they can make a difference.

Our efforts will investigate the role and effectiveness of social marketing within the energy conservation, efficiency and renewable fuels dialogue. We will compare different messages, venues and follow-up communication processes to determine what has resulted in behavioral change.

## **INTRODUCTION**

Customer Behavior Change was launched in Colorado in 2009 as a program of Xcel Energy. The program is an indirect program with the objective of initially heightening residential and business customers' awareness about energy efficiency and conservation and then develop engaged customers who will proactively take steps to reduce their energy consumption. Another goal of the program is to get customers to sign up for other Xcel Energy demand side management programs, thereby selecting high efficiency measures when they are in the market for such things and thereby reduce their long-term energy consumption. Through communications and other behavior change strategies, it is the program goal of moving customers down a continuum from awareness of energy usage to knowledge to attitudes to intention to conservation actions.

There are three components of the program: outreach to residential customers primarily at large shows and community events, outreach to business customers via workshops and trainings and brand advertising to raise general awareness.

## **PROGRAM DESCRIPTION**

The Customer Behavior Change Program focuses primarily on creating awareness of energy conservation while providing customers with information on what they can do to reduce energy use in their homes or buildings. The program hopes to encourage customers to think of the utility as a trusted source of energy efficiency and conservation information, and to engage customers to make changes that lower their energy use. It focuses on educating customers and their employees regarding impacts of their energy use and offering choices and information on how to take action to achieve long-term energy and environmental savings.

The Customer Behavior Change Program emphasizes:

- Introducing energy efficiency and conservation behavior changes into the marketplace;
- Advancing existing energy efficient technologies, services, and behaviors so that they become more widespread; and
- Removing or decreasing the use of inefficient technologies, services, and behaviors.

### **Residential Customer Behavior Change**

This indirect-impact program focuses primarily on creating public awareness of energy conservation while providing residential customers with information on what they can do in their daily lives to reduce their energy usage. Because the residential segment is demographically varied, Xcel Energy employs a variety of resources and channels to communicate conservation and energy efficiency messages.

This program is targeted to all Colorado natural gas and electric residential customers. In the initial implementation of the program, primary emphasis is placed on:

- Community-based events, such as home shows and conservation events
- Partnerships with local, regional, and state government agencies where possible, as well as non-governmental agencies to reach target residential audience segments
- Online messaging through ResponsiblebyNature.com and other local websites
- Sponsorship of local Earth Day events
- Conservation messaging through Xcel Energy's newsletters and bill inserts to residential customers
- Publication of reference education materials (in English and Spanish)
- Print, radio, and online advertising

### **Business Customer Behavior Change**

This program is targeted to all Colorado natural gas and electric business customers, with stronger emphasis on small- to mid-sized customers. As a result of this program, the utility hopes to create public awareness of energy efficiency and energy conservation while providing business customers with information on what they can do to reduce energy usage. In the initial implementation

of the program, primary emphasis is placed on:

- Energy efficiency and conservation messaging through email and print newsletters;
- Focused customer segment events and sponsorships through business and trade associations;
- Customer outreach through energy efficiency workshops; and
- Customer employee behavior change campaign (Smart Energy Employees).

## **Events and event scoring**

The program team has created a process to vet events. Any team member may learn of an event or an event may be brought to the team by a fellow employee or event organizer. Events are scored and selected based on criteria based on segment marketing objectives, statewide coverage and other factors. The event management firm staffs the event and includes collateral that links back to ResponsiblebyNature.com and provides specific program materials based on what is being promoted at that time. After a residential or business customer attends an event, it is the CBC program intent that customers then contact the Company for more information. Customer contact is tracked primarily through event attendance, sign-ups at events, and unique web site visits. These direct customer activities comprise the primary metrics that are used to indicate program success.

## **EVALUATION METHODS**

The Colorado Public Utilities Commission ordered that the program be evaluated in 2010. The evaluation kick off occurred in April. The proposed methodologies include the following:

- ✓ Review of program artifacts
  - Marketing and media plans and collateral,
  - Event participation reports, which will be the basis of the participant sample with segmentation appended
  - Web statistics on the CBC campaign site ResponsiblebyNature.com
- ✓ Review of current research: ad tracking results, omnibus study findings, CO Attitude Awareness & Use Study (AAU)
- ✓ Depth interviews with program management, corporate communications and brand, the event management firm and the advertising agency
- ✓ Development of a logic model
- ✓ Surveys of participants and non-participants
- ✓ Evaluation of program cost overall

## **SPECIFIC AREAS TO EXPLORE BASED ON OTHERS' FINDINGS**

### **No need to reinvent the wheel**

In building the program logic model we want to appreciate behavior change research and a growing body of work specific to energy use decision making, motivations, successes and challenges. Further, we want to be very thoughtful around the specific behaviors we are asking customers to change and the tools we might provide to support their new habits. We also want to be certain that the program logic and indicators of success match. Demonstrating indirect behavior change or direct

savings needs corresponding paths and indicators in the logic model.

### **Measuring Along the Continuum**

While it is a fact that the CBC program met its participation goals in 2009 and is on track to reach its *authentic interaction* goals by June 2010 fully 6 months before year end, whether customers have changed energy using behavior in response to these interactions remains unknown. The assumption that raising awareness results in behavior change remains just that, an assumption. Creating a systematic, robust approach to program feedback is necessary to move the program forward and prove out success as well as identify challenges that if overcome may lead to greater program effectiveness. The desire to migrate from indirect to a direct program will also be served through more robust measurement around very specific savings goals and the costs to achieve them.

### **Keeping Eyes on the Prize**

The evaluation will explore the relationship between event attendance and reported behavioral change across populations. Are there specific events that provide a better catalyst to change and have more immediate or longer lasting effect? Are there characteristics of the individuals reporting behavior change that should be noted. Event marketing and event activities need to emphasize the goal is reducing energy consumption. In the literature, some programs reporting success have asked customers to make a pledge. While fun and games can be used to attract interest, participants who have no intention of pledging to reduce energy use and/ or acting on the information provided could be discouraged from “playing.” Before, during and after the event it may be necessary to strengthen the link between information and action. Post-event “nudges” and handholding are also needed to get people to act. Dethman et al. suggest changes in program design that provide greater incentives for acting in a certain time period, or events that give away the measure may prove more successful.

## RESOURCES

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