Social marketing and conservation

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19.1 Introduction

Most conservation issues stem from people's actions and choices, so halting biodiversity loss depends on changing human behaviour (Schultz, 2011). The two main approaches traditionally used to achieve such behaviour change are based on education, where people are encouraged to understand and appreciate the natural world, and legislation, where people are punished for breaking rules and laws designed to protect nature (Rothschild, 2000). Both approaches have advantages, but evidence suggests they are often ineffective because increasing awareness is rarely sufficient to change behaviour (Waylen et al., 2009; Chapter 18) and effective conservation legislation in the face of opposing social norms depends on costly enforcement (Cooney et al., 2017). This is why conservation scientists and practitioners increasingly recognise the value of approaches based on social marketing, which seeks to change people's behaviour for the benefit of wider society by using techniques originally developed in the business world to sell products and services (Smith et al., 2010; Wright et al., 2015). This link to commercialism makes many conservationists queasy. However, the current extinction crisis shows we need to move outside our comfort zone and consider new techniques with proven success. In this chapter we discuss the use of social marketing in conservation, beginning with definitions of the terms and an explanation of how it differs from

conservation education. We then briefly review how social marketing has been used in community-based natural resource management, demand reduction and flagship species fundraising, and end by discussing lessons that relate more broadly to conservation.

19.2 Defining marketing and social marketing

Marketing is widely used in the private sector and is defined as 'the process of planning and executing the development, value, promotion and distribution of products, services, and ideas to create exchanges that are mutually beneficial' (Silk, 2006). It is an important component of most successful businesses, so it was probably inevitable that other sectors would apply marketing techniques to their work. In particular, this led to the development of social marketing, defined as 'the systematic application of marketing along with other concepts and techniques to achieve specific behavioural goals for a social good' (French et al., 2006). It should be noted that while social media is often used in social marketing, they are not the same thing. Instead, social media is just one type of communication channel, with other examples including radio, billboards and street theatre.

In the behaviour change field, social marketing is seen as one of four approaches (Rothschild, 2000; Santos et al., 2011). Two of the others, education and law, are widely recognised in conservation. The fourth is technical intervention, which is defined as those aspects of technology, infrastructure or equipment that are critical to enable behaviour change to take place. The appropriateness of these four approaches in a particular context can then be defined based on three components: a person's ability, opportunity and motivation to change their behaviour. These three components determine whether a person is prone, unable or resistant to behaviour change (Figure 19.1a), and hence which combinations of approaches should be used in response (Figure 19.1b). Law-based approaches should be used when people lack motivation, education-based approaches when they lack the ability and technical intervention-based approaches when they lack opportunity (Figure 19.1b). In contrast, marketing-based approaches are useful in a much wider range of circumstances, because they are designed to overcome a lack of all three components. Moreover, while social marketing and education campaigns are often confused, there are other fundamental differences between the two approaches. In particular, social marketing focuses on exchange, with both sides willing to engage in the transaction and happy with the outcome, whereas conservation education depends on people changing their behaviour for the greater good. In addition, while both approaches are designed with a target audience in mind, this is fundamental in social marketing, and involves identifying and defining the target audience based on factors that relate to their relevant values and interests (Wright et al., 2015).
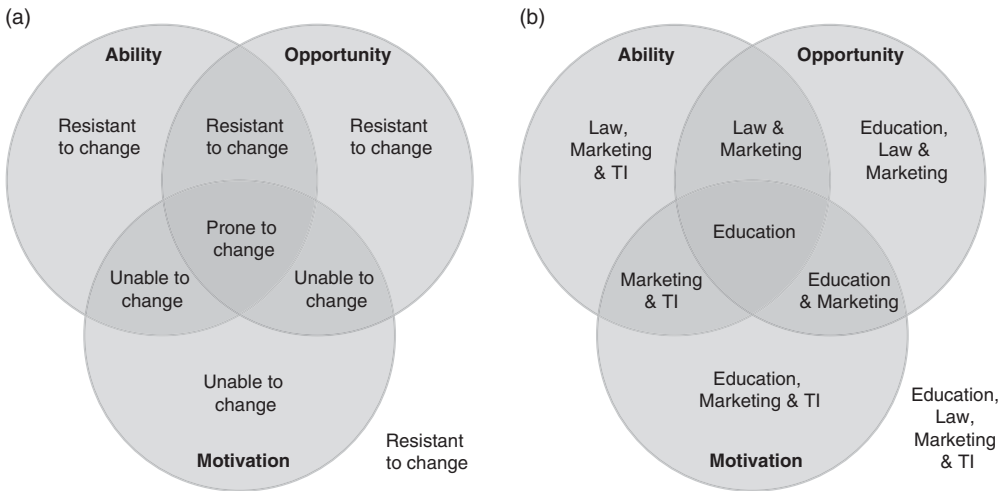
Figure 19.1 Diagram showing how a person's ability, opportunity and/or motivation determines (a) whether they are prone, unable or resistant to change and (b) the appropriateness of the four different behaviour change approaches of education, law, marketing and technical intervention (TI) under these different conditions (adapted from Rothschild, 2000; Santos et al., 2011). (A black and white version of this figure will appear in some formats. For the colour version, please refer to the plate section.)

Social marketing has been used for over 50 years in areas such as health, development, financial literacy and transportation (Lefebvre, 2013) and is now represented by a number of practitioners and professional bodies. These groups came together to develop a broader definition, stating: 'Social Marketing practice is guided by ethical principles. It seeks to develop and integrate marketing concepts with other approaches to influence behaviours that benefit individuals and communities for the greater social good. It seeks to integrate research, best practice, theory, audience and partnership insight, to inform the delivery of competition sensitive and segmented social change programmes that are effective, efficient, equitable and sustainable' (iSMA et al., 2013). A key component is the application of a systematic, step-by-step process that is described and illustrated in Box 19.1.

19.3 Social marketing in conservation

The application of social marketing in conservation is relatively new compared to sectors like health and development, although its role in fundraising goes back decades (Nicholls, 2011). More recently, a number of conservation scientists and practitioners have recognised the approach's value, and social marketing is becoming a more common component of the conservation

Box 19.1. Bonaire parrot campaign

In 1998, a social marketing campaign was launched on the Caribbean island of Bonaire to help save the yellow-shouldered Amazon parrot (*Amazona barbadensis*), known locally as the lora (Figure 19.2). This species was threatened by habitat loss and illegal capture because, despite laws to protect the lora, enforcement was sporadic and they were commonly kept as pets. A survey at the start of the campaign estimated that 300 loras remained in the wild on Bonaire and conservationists were concerned the species would become extinct without a change in local attitudes and behaviours. To address this, they took a new approach.
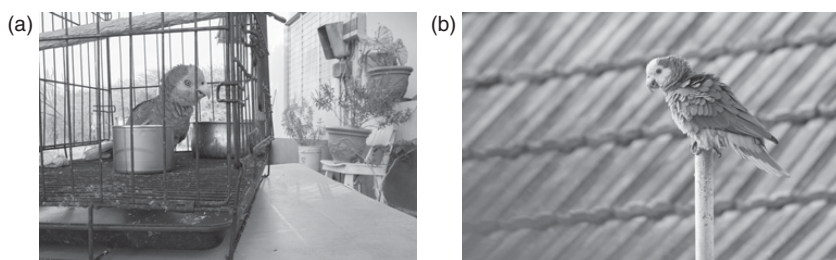
(a)   (b)

Figure 19.2 The lora or yellow-shouldered Amazon parrot (*Amazona barbadensis*) that was the focus of a social marketing campaign on the Caribbean island of Bonaire. (A black and white version of this figure will appear in some formats. For the colour version, please refer to the plate section.)

The conservation organisation Rare had already run social marketing campaigns on other Caribbean islands, which were based on creating national pride in a target species to shift attitudes and behaviours towards that species (Scholtens & Butler, 1999). Conservationists on Bonaire approached Rare and together formed a committee of local organisations to plan a year-long social marketing campaign to 'Save the Lora'. Following social marketing theory, the campaign included the following six core concepts (ESMA, 2017):

1. **Setting of explicit social goals**. The first step is identifying the behaviour the campaign is trying to influence and setting clear, quantifiable goals related to that behaviour. On Bonaire, the goal was to reduce the number of people purchasing loras as pets and so, ultimately, reduce the number of these parrots removed from the wild.

2. **Citizen orientation and focus**. In social marketing programmes, citizens should be engaged in the process of identifying issues and developing solutions. On Bonaire, a consortium of environmental organisations, government departments, media companies and volunteers was created to plan and implement the campaign. Before the campaign, the committee

Box 19.1. (cont.)

conducted a formative evaluation to understand citizens' knowledge of and attitudes towards the lora. To do this, they distributed a questionnaire to approximately 4% of the island's population. The data they collected helped inform the campaign message and provided baseline information for measuring the campaign's impact.

3. **Highlighting target audience benefits via a mix of marketing interventions**. Social marketing campaigns ask people to exchange a detrimental behaviour or value for a more desirable one. On Bonaire, the campaign asked people to exchange the opportunity cost of having a pet lora for a new symbol of collective national identity. The campaign sought to reframe the lora, which was traditionally seen as a pet, as a symbol of national pride. This 'product' was sold using a mix of marketing interventions, including radio broadcasts, songs and pamphlets. Volunteers also dressed in a giant lora costume to emphasise the species' role as a national mascot.

4. **Theory, insight, data and evidence informed audience segmentation**. Social marketing is based on the idea that a one-size-fits-all approach rarely works. Instead, it is important to spend time and resources identifying, understanding and selecting which parts of the population (known as 'segments') should be the focus of subsequent campaigns. Following the Rare Pride Campaign model, the group on Bonaire developed campaign materials to target different audiences. They used formative research to help identify the most popular news sources on the island and produce radio shows, music videos and articles to reach different segments of the population. For example, they created a song about the lora to reach school children and a religious sermon to reach church congregations.

5. **Competition/barrier and asset analysis**. Social marketing programmes also seek to identify and remove barriers that could keep their target audiences from adopting or sustaining positive behaviours. On Bonaire, keeping loras as pets had become a social norm, so the Rare campaign focused on reframing this species as a wild animal that should stay in the wild. The campaign also worked with local newspapers and radio stations to inform citizens of the illegality and consequences of keeping this parrot in captivity.

6. **Critical thinking, reflexivity and being ethical**. To be effective and ethical, social marketing campaigns require flexibility and an understanding of the local context. When the campaign started on Bonaire, hundreds of loras were estimated to be in captivity, making it impossible to confiscate all illegal pets. Instead of confiscating the birds, which would have resulted in animal welfare issues, the campaign focused on creating a context in which no new pet loras would be acquired.

Box 19.1. (cont.)

Following this campaign, there has been a long-term increase in the lora population on Bonaire. Recent research suggests the campaign played a role in this conservation success by helping shift social norms around keeping loras as pets and increasing support for the enforcement of existing laws and regulations (Salazar, 2017).

toolbox (Wright et al., 2015). To illustrate this, we briefly outline how social marketing has been used in three different aspects of conservation practice.

19.3.1 Community-based natural resource management

Increasing the sustainability of natural resource management by local communities is perhaps the most widespread use of social marketing in conservation (DeWan et al., 2013; Green et al., 2013). For example, the US Fish and Wildlife Service created the 'Stop Aquatic Hitchhikers' campaign to empower recreational waterway users to help prevent the spread of aquatic invasive species (Larson et al., 2011; Figure 19.3). These species are a major threat to global biodiversity and have important economic impacts (Gallardo et al., 2016), but often remain forgotten because they are underwater and thus out of mind. The campaign used social marketing to make the issue more salient among groups such as boaters, anglers, rafters, kayakers, sailors and waterfowl hunters who inadvertently transport aquatic invasive species across waterways on their equipment. As most of these activities require licensing or registration, the Fish and Wildlife Service represented not only an important source of information about the profile of its target audience, but also active partners to promote the appropriate cleaning of recreational equipment. Using branding, the campaign leveraged the links between natural resources and the identity of communities who live on or near the water. They instilled a sense of stewardship in recreational users, so that the target audience was willing to exchange old behaviours for new ones to keep the rivers clean for the benefit of themselves and others (Ries & Trout, 1982). The support of local businesses and other government agencies was vital, as they not only acted as key influencers but also created additional visibility and salience for the message around the need for more thorough cleaning of equipment.

19.3.2 Demand reduction

One of the earliest uses of social marketing in conservation was to reduce demand for wildlife and wildlife products, based on campaigns to discourage

Protect Your Waters

STOP AQUATIC HITCHHIKERS!

To help protect Florida's lakes, rivers and springs from invasive species, be sure to:

CLEAN plants off and dispose of them on dry land or in the trash.

DRAIN standing water from your boat.

DRY your boat to prevent the transport of aquatic hitchhikers.

For more information, visit:
www.plants.ifas.ufl.edu or **www.protectyourwaters.net**

Figure 19.3 Promotional material encouraging boat owners in the Greater Yellowstone Area to adopt practices that will reduce the spread of invasive species. (A black and white version of this figure will appear in some formats. For the colour version, please refer to the plate section.)

people from buying selected species as pets (as detailed in Box 19.1). More recently, increases in the illegal wildlife trade has created wider recognition of the value of social marketing for demand reduction, as a way to tackle the resultant threats to biodiversity, public health, local livelihoods and effective governance (Veríssimo et al., 2012). One example is the Chi Initiative, which was launched in 2014 and seeks to reduce rhino horn consumption in Vietnam by targeting wealthy businessmen (Offord-Woolley, 2017). The campaign messaging built on the Vietnamese concept of Chi, or 'strength of will', and emphasised that masculinity and good fortune come from an individual's character, not from products purchased on the market. Thus, they sought to create conditions in which taking rhino horn is seen as a sign of weakness, so that business men are

willing to exchange this behaviour for one that does not support the illegal wildlife trade. This campaign pioneered the use of social marketing techniques to tackle the illegal wildlife trade, but also illustrates some of the difficulties. In particular, it shows how hard it can be to measure campaign impacts in the context of dynamic rhino horn demand (TRAFFIC, 2017) and multiple ongoing demand reduction efforts in Vietnam. This should become easier in the future, though, as the number of demand-reduction interventions has grown in the last decade (Veríssimo & Wan, 2018), increasing the amount of research and monitoring of market trends and interventions.

19.3.3 Conservation flagships

There is a long history of organisations using particular species for fundraising and awareness-raising. Traditionally, flagship status was seen as an intrinsic characteristic, failing to recognise that flagship species are actually marketing tools. This has changed, with a new definition of a flagship as 'a species used as the focus of a broader conservation marketing campaign based on its possession of one or more traits that appeal to the target audience' (Veríssimo et al., 2011). Viewing flagship species through this lens implies that these campaigns should adopt core social marketing concepts, including setting explicit social goals at the beginning of the process (ESMA, 2017). This is important because people generally prefer species that are large, brightly coloured and/or have human-like traits (Gunnthorsdottir, 2001; Barua et al., 2012; Borgi & Cirulli, 2015). Thus, setting goals helps guide actions towards the species most needing conservation (Veríssimo et al., 2017), rather than those that are most popular with the target audience (Smith et al., 2012). Emphasising that it is the species' traits that are important, rather than the species itself, also suggests the flagship approach can be applied to broader aspects of biodiversity. For example, Conservation International's biodiversity hotspots (Mittermeier et al., 2004) have been described as a new type of flagship, designed to appeal to a target audience of international donors by emphasising traits based on endemic biodiversity, return on investment and scientific credibility (Smith et al., 2010). The main aim of this campaign was to raise funds rather than change people's behaviours, meaning it cannot be defined as social marketing. However, the creation of this new type of flagship did have wider social marketing impacts, by building local pride in countries containing these hotspots, leading to new conservation policies and wider civil society engagement (Visseren-Hamakers et al., 2012).

19.4 Broader lessons from social marketing

Social marketing is a structured and systematic approach for achieving positive conservation outcomes and so many of its fundamental principles are shared with other aspects of conservation decision science and implementation.

However, it provides a number of specific insights that have broader relevance for conservation, which we highlight below.

1. Acknowledging ethical issues

Some critics are uneasy about the ethical issues underpinning social marketing, partly because of its links with capitalism and consumerism (Smith et al., 2010). One accusation is that campaigns are a form of 'brainwashing', so it should be stressed that social marketing is always based on choice and mutually beneficial exchange. A more fundamental issue comes from campaign development, as while the social marketing definition states the approach 'is guided by ethical principles' (iSMA et al., 2013), it does not specify whose ethics should do the guiding. This is a key concern, because marketing need is often identified by external actors with world views and priorities that differ from those of the target audience (Adams & Mulligan, 2003). Obviously, this issue applies to all behaviour change initiatives and, by focusing on choice and beneficial exchange, social marketing might be better at producing locally supported solutions than approaches based on education and legislation. However, social marketers should always be mindful of the power imbalances involved and be open to outside scrutiny and criticism.

2. The importance of evaluation

It is almost universally agreed that monitoring and evaluation should be core parts of any conservation activity (Sutherland et al., 2004), although their relative rarity shows that conservationists often fail to dedicate the necessary time and resources (Lindenmayer & Likens, 2010). This is less of a problem in business, where learning how to increase effectiveness pays for itself, and helps explain why evaluation is a fundamental component of marketing. This focus on effectiveness is probably why social marketing campaigns were some of the first behaviour-change projects to systematically evaluate their work (Jenks et al., 2010), as an important way to understand their target audience and adapt their campaigns to increase impact. Just as importantly, social marketers recognise that behaviour change projects can have a range of unintended consequences, including negative impacts. For example, a campaign based in Dominica, similar to that used in the lora project, raised the profile of the flagship species but created a negative association with another parrot species (Douglas & Winkel, 2014). Examples such as this illustrate why social marketers are obliged to learn from their actions and improve.

3. Changing behaviour is not easy

While social marketing offers many valuable opportunities for achieving conservation goals, behaviour change can often be slow and expensive. This is illustrated by campaigns from other sectors, such as public health, which

have been working on behaviour changes for decades with varying success. Many of these campaigns failed to make any impact, or even had the opposite of the intended effect. For example, one of the US government's flagship programmes to reduce teen substance abuse actually led to an increase in adolescent drug use in certain contexts (Rosenbaum & Hanson, 1998). Such findings have contributed to the results of a recent systematic review on the effectiveness of global health programmes, which found the majority had no positive behavioural results, although success increased with the quality of the campaign (Firestone et al., 2017). Thus, caution is needed when describing the potential gains from social marketing in conservation, especially because funding for such work is likely to be relatively small compared to the health sector. However, evidence from interventions like 'Save the Lora' suggests behaviour change is possible, especially when campaigns influence societal norms and allow governments to improve regulation and enforcement (Salazar et al., 2019).

4. The myth of 'the general public'

A fundamental insight from marketing is that the 'general public' is an empty concept when communicating with people. This is why audience segmentation is a core concept in social marketing (Box 19.1), based on categorising people into relatively homogeneous subgroups, so that the resultant campaigns can be tailored for maximum impact. Demographic factors like age and income can play a role in defining these groups, although psychographic factors like attitudes, interests and beliefs are often more important (Wright et al., 2015). More broadly, conservationists should recognise the audience-specific nature of their messages, rather than broadcasting them to as many people as possible. For example, while messages based on 'ecosystem services' have been successful at highlighting the financial value of nature to government bureaucrats, they have created possibly avoidable tension when aimed at people who value nature for other reasons (Jones, 2018).

5. Value is more than a financial metric

The huge profits of some companies can be viewed as illustrations of all that is wrong with marketing, where advertising campaigns lead people into buying over-priced goods and services. However, it also reveals a fundamental marketing premise: a product's value is neither fixed nor dependent on its manufacturing costs (Sutherland, 2019). This insight also underpins social marketing in conservation, where people change their behaviour because campaigns foster stronger, more positive links with specific species, ecosystems and actions. Thus, for example, the 'Stop Aquatic Hitchhikers' campaign empowered people to reduce their negative impacts on the places they love and the 'Save the Lora' campaign built local pride in an endemic species. In each case this increase in

value was not measured financially, although the target audience may now be more willing to fund and support activities to conserve these species and habitats.

In conclusion, in this chapter we have discussed how social marketing has been used in conservation and highlighted its strengths and weaknesses. However, benefiting from these strengths involves accepting uncomfortable truths: many conservationists are uneasy about learning from the corporate world or accepting that their reasons for loving nature are not universally shared. However, we can only stem biodiversity loss by engaging with the widest possible range of people, and social marketing is one of the better ways of understanding these multiple audiences and working with them to increase how they value nature.

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