

Conservation Action Marketing

Tools and Techniques



Special Interim Update

(Further Updates Pending)

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There can be no purpose more inspiring than to begin the age of restoration, reweaving the wondrous diversity of life that still surrounds us.

E.O. Wilson, *The Diversity of Life*

The attempt to actually reproduce an ecosystem may be an act of incredible arrogance, and yet it is also an act of profound faith in the future of nature and human beings.

Don Gayton, *Landscapes of the Interior*

CONSERVATION MARKETING AND THE LIVING BY WATER PROJECT

Developed for organizations and agencies working in conservation, this paper outlines some of the tools and techniques that make up our conservation marketing approach. On many occasions and at numerous workshops and conferences, representatives of *The Living by Water Project* have received positive feedback regarding the special features of our approach for motivating citizens in caring for Canada's marine and freshwater shorelines.

The Living by Water Project is a conservation program targeted to individual urban, rural and seasonal waterfront residents, and other citizens interested in natural healthy shorelines. Our goal is to improve the quality and quantity of wildlife habitat, including cleaner air and water. At the outset of the project (in 1998) we carried out an extensive needs assessment and did market analysis, including focus groups, to determine audience requirements. These were summarized in a strategic document *Making It Happen – A Strategic Approach to The Living by Water Project*. A mission statement, guiding principles, and a vision for the project were developed; as well, we determined that a hybrid conservation marketing approach would be critical to achieving our objectives.

Through the project we are helping community-based groups and other partners to address the problem of shoreline degradation by marketing an environment-friendly and wildlife habitat-friendly waterfront lifestyle. We provide a variety of programs, initiatives, products and services to help groups, agencies and citizens achieve this end. We also work closely with the media.

Our version of conservation marketing builds on modern ethical business marketing, and on the tools and techniques of both community-based social marketing and environmental education. Our purpose is to motivate and therefore move people along a continuum from awareness through education, to attitude and behaviour change and eventually sustained behaviour change. We believe that cumulative positive impacts are possible when many individuals change their lifestyles; in the nature of the problem lies the solution.

CONSERVATION MARKETING PRINCIPLES

To effectively change behaviour through conservation marketing, a conservation initiative must follow a number of principles. These are outlined in the following pages.

A VISION FOR TODAY... AND FOR THE FUTURE...



In recognition of the roles and values of Canada's shorelines, the following expresses our vision as waterfront residents:

- We enjoy **healthy habitat**, with better air and water quality -- and wildlife enjoys it too!
- Waterfront environments remain **special places** for recreation and for restoring our spirits. Shorelines of our streams, lakes, rivers, and seashores continue to attract us.
- We **protect wildlife** through careful waterfront construction and shoreline restoration.
- We express a **sense of caring** for waterfronts by keeping our eyes on the water and along the shoreline.
- We **share information** on caring for the "ribbon of life" with our shoreline and upland neighbours.
- **Values of our waterfront properties are maintained** as each of us learns more about environmental impacts and alternatives.

Being Customer Driven

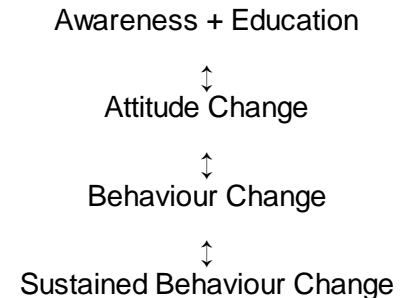
From a marketing perspective, the customer or client plays a central role in determining how successful companies do business – what products and services they offer, how and when they offer them, and what prices they charge. What does this mean for a conservation initiative, and how does it translate into action?

- **Defining your audience as your “customer”.** For conservation groups, the target audience needs to be viewed as your customer. You are selling knowledge, awareness and education, in order to ultimately achieve behaviour change – in fact, sustained behaviour change over time.
- **Respecting the client.** For *Living by Water Project* initiatives, the customer is usually the waterfront resident. We need to respect them and their knowledge about, and visions for, their waterfront properties. We need to remember that they may be our neighbours or friends.
- **Understanding the customer.** This means providing services and products that are appropriate, and meet audience needs. It means using understandable language, making material relevant for the customer (land owner, tenant or leaseholder), and using illustrations that are appropriate for diverse audiences representing a range of ages, regional and ethnic backgrounds.

Understanding the customer means learning about who the customer is by researching demographic, psychographic (pertaining to activities, interests and opinions), and psychometric (pertaining to personality and needs) profiles. Our Communication and Distribution Plan was developed based upon research about target audience needs.

- **Meeting customer needs.** The importance of meeting customer needs is often overlooked in conservation programs. Enthusiasm for conservation can sometimes result in messages and materials which may not engage the target audience. For example, our objective might be to protect a sensitive shoreline ecosystem. The objectives of our target audience might include saving money or protecting personal health. One of our challenges is to find common ground, and frame conservation messages in ways that meet the needs of the audience at the same time. We had to remind ourselves of this constantly as we wrote *On the Living Edge*, the book which is our main product for marine and freshwater shoreline residents.

Conservation Marketing

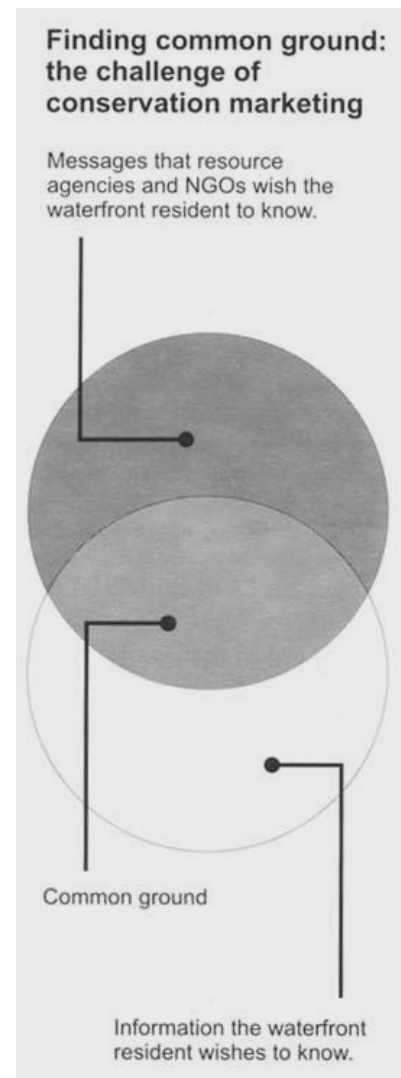


- **Presuming that the customer wants to “do it right”.** Rather than approaching the target audience with the assumption that they have caused a problem, we presume that they would not knowingly destroy habitat or reduce water quality. We assume that they do not know what they need to know. We present choices and avoid both finger-pointing and preaching.
- **Testing and piloting..** Materials are thoroughly reviewed and tested wherever possible by using focus groups, questionnaires, and pilot programs. Based on feedback, we modify and adjust.
- **Overcoming barriers.** Often, the blocks to a waterfront resident taking action may be financial, a lack of time, or perceived peer pressure. When customer-driven marketing influences a program, products and services are developed in an integrated fashion to help overcome these blocks. For *LbyW*, services have included access to low interest loans, access to volunteer labour, or access to local support groups.
- **Finding common ground.** By finding common ground and bridging the gap between our objectives and theirs, we in conservation programs can show customers how their needs can be met at the same time as achieving objectives of shoreline protection and restoration.

In the case of *The Living by Water Project*, client needs may include assistance in solving problems such as erosion, septic issues, or help with native plants. They may be looking for tips and techniques for improving their property, or for saving money and time. Using information and materials which we provide, local groups can offer workshops and site assessments which meet these needs at the same time as shoreline conservation messages are incorporated.

- **Getting regular feedback.** Meeting client needs for products and services means that they must be continually evaluated, and that they must be updated regularly to remain relevant. *The Living by Water Project* is achieving this through:

- monitoring where possible sales, workshops, homesite assessments, and other sales indicators
- tracking of numbers of commitments made for on-the-ground change
- using evaluation surveys to obtain feedback (for example, after workshops, and a phone survey of customers by an independent marketing company to obtain feedback, including both individual waterfront residents and organizations who have used our materials)



- constant dialogue with waterfront residents – through conducting shoreline home visits, answering inquiries, participating in cottage and home shows, etc.

Using Promotion

A conservation marketing approach means that promotion must be embedded throughout an outreach program. Promotion needs to be extensive to be effective; and, through creative thinking, many opportunities can be found for promotion, even when budgets are limited. Promotion is often cut from budgets of cash-starved programs but this can doom the program, particularly given the “three times principle” (research shows that people need to see information at least three times before they act on it). This means that a single ad in a newspaper promoting an upcoming meeting is not usually sufficient to garner a high turnout. Paid advertising can quickly use up a budget, so other creative ways need to be found to help promote a program.

We utilize many ways of promoting *LbyW* and its themes and messages. Some ideas include:

- **Events and initiatives.** A variety of events and initiatives can be used to promote shoreline awareness. We have worked with one partner who organized a very successful *Living by Water Dessert Night*. They sent customized invitations to all the creekside and lakeshore residents in an area, and received an excellent response of 170 confirmations. The evening included talks about shoreline issues, native plants, a draw for door prizes – and, of course, dessert! Another community partner organizes a Lake Awareness Day every summer, and books the community hall for displays, activities, beach walks, and fun things for the children.
- **Partnering.** Through partnering, budgets can be stretched. For example, two or three organizations might work together to create a more attractive public event than it would have been as a single-organization sponsored activity.
- **Sponsored Public Service Announcements.** Using sponsored PSA’s can help stretch limited promotion budgets. Sponsors can be solicited from organizations and businesses with an interest in the services and products of the conservation group. Public service announcements are then provided to the media, with airtime or print space paid for by the sponsor, and with the sponsor’s name publicized

GUIDING PRINCIPLES OF THE LIVING BY WATER PROJECT

- Ensure services and products are appropriate for as many members as possible of our target audience, regardless of tenure status, income level, gender, or language proficiency
- Honour waterfront residents, listen to their stories and wisdom, take the perspective that they want to “do it right” (care for their shorelines), and work to obtain and integrate their input wherever possible.
- Understand our audience and service their needs in the spirit of our mission and goals.
- Be positive and impartial, rather than partisan and finger-pointing.
- Present choices, and avoid preaching.
- Be customer-driven rather than project or product-driven.
- Respond to shoreline resident needs for relevant information, rather than showing off what we know.
- Where possible, be in service to all groups, in the spirit of cooperation.
- Avoid reinventing the wheel by applying what we learn from other sources.
- Involve a broad spectrum of partners and sponsors in order to be cost-effective and efficient.
- Recognize the contributions of sponsors and volunteers, including those who make a commitment to shoreline protection, conservation and restoration.
- Become self-sustaining as soon as possible.
- Maintain high ethical standards and use a soft sell approach.
- Ensure that services and products meet high standards of quality and value.
- Remain on the leading edge of shoreline “stewardship” practices.
- Take a whole ecosystem approach, addressing the role of both micro and macro organisms.
- Remain flexible in order to respond to appropriate opportunities.
- Share information about the project, inside and outside Canada.

- **Catchy themes.** Themes help create a modern marketing appeal; if they are catchy enough, the media will pick them up in their stories and headlines. *LbyW* uses a number of themes and phrases, such as those listed in the sidebar. *Shoreline Ambassador*, “*a new fashion statement*”, “*ribbon of life*” and “*ribbon joining ceremony*” have all been picked up by the news media.
- **Extensive working with the media.** Developing media relationships is critical to successful promotion. Working with the media requires persistence, and understanding and meeting the media’s needs. In this way, working with the media becomes a two-way street – a win-win situation so that the both the media’s needs for good stories, and your needs for publicity, are met. Avoid creating “issues” out of your stories. While some media may like to create a polarized situation of conflict in a story, this may alienate your target audience. Look for other more positive ways to gain media participation, such as success stories (a shoreline restored) or human interest stories (an individual who made a difference in the community).
- **Promotional opportunities for community groups.** In British Columbia, *LbyW* has developed a Community-based Action Program for Shorelines (CAPS). Through this program, we work with community-based groups to assist in creating promotional opportunities – for example, a *Shoreline Forum*, clinics for local elected officials, and programs for realtors, developers, contractors, and tourism organizations. Through occasional awards programs we have offered conservation groups partnering opportunities to use our publicity channels, and to acknowledge success and efforts in protecting and restoring shorelines.

Providing “Full-service”

As a project “in service” to other conservation groups, we are developing a comprehensive range of services to help groups fulfill their objectives. We also assist in capacity building; for example, when we carry out training programs for homesite assessors, we also offer groups training in Conservation Action Marketing.

We recognize the need to support our target audience at all points along the continuum from awareness to sustained behaviour change; full service support helps achieve this. Providing “full

Sample Promotional Concepts and Themes

- Making It Happen
- A New Fashion Statement
- Let’s Enjoy / Let’s Talk
- Keeping Our Paradise Intact
- *The Ribbon of Life*
- The Vital Edge
- The Living Edge
- *Shoreline Ambassador*
- *Junior Shoreline Ambassador*
- Shoreline Watch
- Eyes on the Shoreline
- Honorary *Shoreline Ambassador*
- Repairing and Rejoining the Ribbon
- We All Live Downstream
- Yard by Yard
- Metre by Metre
- For Waterfront Residents, by Waterfront Residents
- Safeguard your Health and Wealth...Naturally!
- Save Time and Money... Naturally
- A Healthy (Lake/River/Stream/Ocean) Goes Hand-in-Hand with a Healthy Shoreline
- Shoreline Talk
- Shoreline Chat
- Shoreline Sense
- Your Erosion Zone
- Beauty of the Buffer
- The Shore Doctor
- Shoreline Makeover

service” support helps meet *LbyW* needs as well; for example, by helping meet customer needs for information, we can often promote our Shoreline Action Challenge Program. Materials often tend to be directed at those people who are already well-versed in conservation objectives. We have identified a market niche within our target audience, of people for whom the concept of an environment and wildlife habitat-friendly lifestyle is a new one. Much of our material is aimed at this market niche; we can therefore assist conservation groups who lack the tools to reach this audience.

Using a Variety of Distribution Channels

We use a variety of approaches and channels to get the *LbyW* message across in effective and innovative ways. Some of these are listed following.

- **Working with the arts.** We believe that the arts can play a critical role in helping develop and maintain a natural shoreline “stewardship” ethic in our culture. The arts reflect, and help shape, values and attitudes; they are also one of the main ways that our culture tells stories. These stories may influence our attitudes towards the earth, and the way we care for our lands. We need to rediscover traditional knowledge and relevant myths to adapt, and create, new “stories”. We must also integrate scientific knowledge about shorelines, from the microscopic level to the macro. The messages of these stories need to be in our conservation handbooks and their messages told and retold in many ways – from dance to poetry, artwork to songs. Three examples from *LbyW*:
 - ▶ **“Splash & Ripple” Theatre Tour.** In 2000, we contracted Precipice Theatre Society of Banff, Alberta to produce and tour an interactive, high energy play for young people on the importance of healthy, natural shorelines. From this play we hope one day to create a legacy Theatre-in-a-Box kit to help children learn about shorelines while they create their own performance.
 - ▶ **National Poster Competition for Children.** We invited young Canadians between the ages 10 - 17 to create art posters on the importance of healthy natural shorelines.
 - ▶ **The Paddling Puppeteers.** An independent group travelling Ontario waters by canoe promotes shoreline restoration and conservation through puppet shows with music and shoreline characters, while handing out materials produced by *The Living by Water Project*.
- **“Ribbons of Life” display materials.** Interactive models and display panels help deliver information about caring for shorelines to groups and communities. Much of this material

is transportable. Groups integrate the displays and activities into their own programs and events – whether a salmon festival, an environment day, or a “focus on water” day for young people.

- **www.livingbywater.ca**. In 2001 we developed a data-base, user driven website. The intent was for the website to become a significant resource for shoreline residents. However, the overly technical aspect detracted from its use and the website has now been simplified considerably.
- **Shoreline Celebration and Restoration Events.** We encourage communities to come together to celebrate the importance of shorelines. This tool helps to increase public awareness, and promotes shoreline restoration, conservation, and protection. In September 2000, for example, the Town of Port Hardy formally declared Shoreline Celebration and Restoration Month and launched the month with a Celebrating Shorelines event in the community centre. This included hands-on displays and guest speakers.
- **Shoreline Event and Activity Manual.** This detailed manual assists groups in carrying out shoreline related events and activities. Case studies in the manual were drawn from various issues of *Shoreline Talk*, an electronic newsletter which kept groups informed about successes in shoreline conservation.
- **Speaking Tour.** A speaking tour throughout BC and Alberta in the summer of 2000 raised awareness about why shorelines are important and why we celebrate them.

Encouraging On-the-Ground Changes

Conservation marketing is only effective if it results in on-the-ground actions. *The Living by Water Project* has a number of tools and techniques for promoting action and on-the-ground change.

- **The Shoreline Action Challenge Program.** This was a national campaign to engage all Canadians to take action in restoring and protecting shorelines. Lists of simple actions for both shoreline visitors and shoreline residents have been developed. These are available in printed brochures for groups to use, and online. In 2001, we partnered with a number of national and regional publications to insert the checklists into their publications. Over 800,000 copies of either “*I want clean*

Shoreline Celebration & Restoration -

A chance for you to encourage public awareness and involvement along the waterfront.

All communities can participate through fun and informative activities and events!

Recognizing our connection to water...creeks, streams, rivers, lakes, reservoirs, wetlands, estuaries, and oceans.

Overcoming Barriers...

A celebration of diversity through the participation of...

Communities & Individuals
Conservation Groups
Zoos, Aquariums, & Museums
Galleries, Theatres, & Dance Studios
Schools, Teachers, & Students
Scouts & Guides
Artists to Zoologists... A to Z!



Initiate, Celebrate, & Participate!!!

Restore a shoreline!
Put on a play or a concert!
Sponsor or enter an art exhibit!
Host a waterfront fair!
Take or lead a nature walk!
Set up an educational display!
Organize a shoreline poem, song, or story-writing competition!
Host a workshop!
First Nations cultural activities!
Create your own activity or event!

water” (for all shoreline visitors) or “*I want to protect my shoreline property*” (for waterfront residents) were distributed in cottage magazines, as well as national media, depending on the audience. Suggested actions in the checklists range from cleaning up garbage along shorelines to letting shorelines stay natural. Individuals who submit a checklist receive a Shoreline Ambassador Certificate to recognize their commitments.

- **The Shoreline Ambassador® Program.** This was linked to the Shoreline Action Challenge Program. Any citizen, of any age, could become a Shoreline Ambassador, by taking action, or committing to take action, to protect, conserve or restore shorelines. Groups such as Guides and Scouts have used the program in their activities, particularly activities for their respective “water” badges. These activities have included cleaning up shorelines, planting shrubs and trees to help restore a shoreline. At one point the Vancouver Aquarium used the program to reward participants in its Great Canadian Beach Clean-up program.
- **The peer pressure engine.** Fashions are contagious. In part, this is why our shorelines are in trouble; the “manicured” lawn, the use of pesticides, adding sand to beaches, and other habits potentially damaging to our shorelines became popular in the past. We are encouraging waterfront residents to lead by doing, and through initiatives such as awards programs, we are working to shift our shoreline fashion consciousness.
- **Workshop-in-a-Box.** The workshop is interactive and motivational, and features tips, advice and hands-on information for waterfront residents. Materials (manual, presentation materials, video, books, display items) are packaged in a portable kit that can be shipped to community groups and used by them as a do-it-yourself workshop. The group can choose to use an outside facilitator, or a local peer co-leader. The workshop provides a personal approach to help promote conservation action, links individual waterfront residents to a local community group, and provides links to resources for follow-up support. The workshop also provides a basis for obtaining information for monitoring and evaluating indicators of shoreline health.
- **The Homesite Assessment Program.** *LbyW* works with local communities and helps train local people to become homesite assessors. The trained assessor is then available to visit the properties of interested waterfront residents, or, if a community group wants to do an outreach contact program, the assessor can participate in this way. An assessor works with individual

“Clive Callaway and Sarah Kipp are developing a new fashion statement. But if you’re thinking wrap dresses and pierced lips, think again. This fashion statement is about letting your waterfront grow wild.”

July 1998 press release, Fisheries and Oceans Canada, announcing contribution to *The Living by Water Project*.

shoreline residents to identify changes which could be made to a home and property (including shoreline) to benefit residents and protect shoreline health. In this way, waterfront residents obtain individualized service, and at the same time, local groups obtain commitments for waterfront conservation. As a result of marketing feedback, the name of the end service has been changed from “homesite assessment” to “home visit”.

- **The Waterfront Living Handbook.** “*On the Living Edge - Your Handbook for Waterfront Living*” is a do-it-yourself book for the waterfront resident. This 144 page book is full of time and money saving tips and advice on topics such as construction, maintaining services like wells and septic, environment-friendly tips for inside the home, naturalizing shorelines, living with wildlife, dock construction, etc. The handbook is user friendly and affordable, and contains a Shoreline Action Checklist and color insert on how to give a shoreline “makeover”. Conservation marketing approaches have been used throughout the book.
- **Monitoring and Evaluation Program.** A customer usage and satisfaction survey was carried out in 2002 by an independent organization to provide arms-length feedback from various organizations and agencies using the project’s products and services.

Assuring Sustainability

A cost recovery program is used wherever possible to recoup printing and duplication costs by way of donations; suggested amounts have been established for items such as brochures, posters or bookmarks.

Using a Whole Ecosystem Approach

The overall approach to *The Living by Water Project* is ecosystem-based, recognizing the interrelatedness of the earth’s air, water and soil cycles. This approach allows the full impact of non-point source pollution or toxic products to be considered, incorporating their impact on groundwater, and on organisms which live in the soil. Micro and macro-organisms are treated with equal importance.

As part of a whole ecosystem approach, the project utilizes the concepts of “zones of cooperation” and “zones of influence”, modified from the Biosphere Reserve Program. Shoreline corridors are viewed as ribbons of life and the intersection of air, land and water as an intricate web. Waterfront residents are seen

The Choice is Ours...

As waterfront residents, we enjoy special privileges and share special responsibilities. We have perhaps the most direct influence on the ribbon of life. We can influence our shoreland neighbours and other members of the community. We can be leaders, demonstrating that it is possible to live cooperatively with nature in critical shoreline zones. Or, we can continue to incrementally degrade water quality and wildlife habitat.

The choice is ours.

Co-founders & lead authors,
The Living by Water Project



A Whole Ecosystem Approach

has been developed which encompasses the following:

- wildlife and humans - our needs, culture and heritage
- traditional, ecological, and scientific knowledge
- from the micro to the MACRO level of organisms
- air,
land & water,
below ground

as living in a zone of cooperation - between the fragile waterfront and the uplands - while exerting their influence among other upland dwellers. Our view of the shoreline is that of an interconnected, interrelated, precious zone of abundant life.

By keeping conservation goals clear, carrying out regular monitoring and evaluation when funding permits, and remaining customer-centred, conservation groups can be assisted in meeting their ecosystem objectives by using a conservation marketing approach in which customer needs are given a place of importance.

CONSERVATION MARKETING TIPS

The following are a few of the decisions we made in developing *LbyW* from a conservation marketing perspective:

- We use benefit statements to encourage people to adopt a more environment-friendly lifestyle. We avoid the use of negative blaming statements and instead prefer to introduce positive options for behaviour change. Instead of blaming people for polluting water with fertilizer runoff, we give them positive alternatives and emphasize the short and long term benefits of keeping nutrients out of surface water.
- When introducing new concepts we try to maintain familiar ground so that the steps to change are as comfortable as possible. For example, we suggest a gradual shift from a grassy shoreline to a vegetated buffer, rather than advising people to make drastic shifts in behaviour all at once. We consider this question of “comfort level” in our distribution channels as well. For example, are make materials available through channels such as realtors, developers and local government. Some people may feel more comfortable obtaining products from these sources than from an environmental organization.
- We stress things that are important for our target audience – readability, for example, is important for people over 50 (as is the majority of our audience – although recent data regarding waterfront property purchasers indicate this age may be dropping). We choose fonts that are clear and big enough, inks and papers that provide good contrast, and illustrations that are inclusive, showing older people as well as young people, males and females.
- We kept our target audience in mind when we developed our colour scheme for *The Living by Water Project*. We chose

Tell me...

I will forget.

Understand me...

I will listen.

Show me...

I will remember.

Involve me...

I will understand.

Respond to my needs...

I will act.

Remind and support me...

I will keep doing.

Adapted from an unknown source by
The Living by Water Project

blue, green, and beige, as they are three favourite colours of Canadians.

- We noticed an absence of people in the illustrations of many “stewardship” publications advocating environment-friendly lifestyles. We have chosen to include pictures of people in our materials, to help make them relevant to our audience, and also to show that a healthy shoreline can include human presence.
- We personalize our public documents by speaking in the first and second voices, “we”, “I” and “you”, instead of impersonal, separating words like “the public”. Providing a personal feel to brochures and other public materials creates a softer tone, and helps make them inclusive.
- In *On the Living Edge*, we incorporated conservation marketing throughout.
 - The cover includes photos of people as well as wildlife; however, our “people-orientation” comes through more strongly, with photos of buildings and people doing things on the shoreline.
 - We stressed a tip-oriented, applied approach. We avoided information for the sake of information; generally, the fascinating tid-bits we all get excited about were included as “did-you-know” items in sidebars.
 - We avoided a preaching tone; in particular, we edited out the word “should”.
 - We emphasized benefits to the reader (such as improved property values, shoreline protection, health protection, time and money saving tips), and potential losses to build on the fear of loss (for example, loss of land through erosion, risks to health through deteriorating water quality, risks of litigation from neighbours, risks of fines from regulatory authorities).
 - We used the “peer-to-peer approach, with real-life quotes from other shoreline residents citing their experiences and lessons learned.



For more information, contact *The Living by Water Project*
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