

A Time for Strategy

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*And some things that should not have been forgotten were lost.
History became legend. Legend became myth¹.*

Have environmental NGOs forgotten how to campaign? Well no but are some forgetting? Perhaps: at least strategy seems to be slipping out of many 'campaigns'.

An opportunity for strategy

Issue 39 of the Campaign Strategy newsletter² argued that in many countries climate campaigners were confronted with an unusual opportunity to harness the 'FUD factors' of fear uncertainty and doubt. It suggested that growing concern about an economic downturn caused by the credit crunch could be used to drive nervous governments to seek popularity by insulating householders and car owners against the affect of rising energy prices, through greater use of renewables and greater efficiency.

Since then oil prices have rocketed, sparking fuel and food price protests in over twenty countries around the world. In the UK this led to a frenzied but fairly directionless flurry of media comment pointing out how much the world relies on oil, particularly when the Governor of the Bank of England announced a huge oil-driven hike in inflation, just as Shell tanker drivers were on strike and oil hit \$140 a barrel.

That day for example, the BBC's middle of the road music channel Radio 2 carried a long lunchtime interview³ by Jeremy Vine with Professor Phillip Stott, well-known as a climate-change denier⁴, in the role of an 'expert' telling us what it meant to listeners at home.

Mrs Stott the sprayer

Stott traipsed around his house giving a running commentary on how there was oil embedded in his household fabrics, his CDs, his milk, food and so on. *"The whole of our economy is tied to oil"* announced Stott. Well not quite - what about wind energy, or nuclear, or hydro? Not mentioned. Nor was any other form of renewables. Poor people would be particularly hard hit because of heating, and the oil price would impose a *"direct cost"* on his fridge because it was *"running on electricity"* (in fact oil-fired electricity actually accounts for about 2% of UK generation). No mention of switching to a green tariff.

If not a climate-change denier, Stott did his best to be a solutions denier. It was what in England would be known as an "ooh-Missuss" performance in which the interviewer and interviewee egged each other on to revel in how awful the situation was. *"It's almost as if you can't find anything in the home which doesn't have some relation with oil!"* exclaimed Vine. We are an *"oil based society for literally everything we use"* exaggerated the professor gleefully. His wife's oil-based cosmetics apparently filled the bathroom cupboards - no mention of the many plant-based alternatives that are available. Plainly we are all doomed, or at least peak oil heralds the end of the artificially fragrant Mrs Stott.

According to the Professor, *"all you can do"* about changing your heating is to *"put a new boiler in - but that's very expensive"*. Stott quoted a cost of £4,000 but most condensing gas boilers are more like £1,500 with a payback of around seven years, and if the boiler needs replacing anyway, the additional cost of a few £100 may be recovered in one year. And that's without

taking into account grants available to the poor or elderly - again, not mentioned. Stott's solid walls could not be cavity insulated - no mention of external insulation.

Peering out of one of his listed (so can't be replaced with anything energy efficient) sash windows, Stott observed his wife, apparently poised with her plastic oil-based sprayer in hand, doing a "*bug spray*" in the garden. More oil in pesticides and fertilisers! On this and other subjects the merry doom-monger Stott had a simple answer to why people we wouldn't use the un-mentioned alternatives: "*people have got used to it*". Used, that is, to a life devoted to untrammelled use of fossil fuels.

Finally, in a fabulous denial of photosynthesis, Vine declared "*take the oil away and you haven't even got a garden!*" Well I never.

Stott made no positive suggestions about how to de-carbonize his or anyone else's lifestyle and Vines' only attempt to question this counsel of despair was to mutter something about using a watering can when Stott reported his wife's chemical gardening habit. All rather like one of those 1950s 'educational' films made by the oil industry in which housewives cooed about the all pervasive wonders of petrochemical products.

If they were listening to this (about 13m people do), then the folk at the Energy Savings Trust, WWF, the Sustainable Development Commission and the host of others who have been beavering away at 'green living' behaviour change must have been pulling their hair out. Where, they might cry, was the organic farming, the wood burners, the heat pumps, even the energy efficient light bulbs, let alone bio-plastics, electric cars or cutting back on flying and not over-cooking the vegetables ?

So what?

The media savvy can shrug off the likes of Jeremy Vine as above all journotainment but this was presented as authoritative by the use of a BBC 'Professor'. 'Emeritus' sounds good – "*basically it means he's a clever chap*" explained Vine - well maybe but not on the evidence of that performance. Such daytime media do matter though, because they mould the popular idea of what is possible and how we should respond to trends such as rising fossil-energy prices. That in turn informs the political mood about what is possible.

So what's this mean? That the greens should be quicker with instant rebuttal and besiege the BBC? Listeners were in any case, soon on the line to Vine with their own idiosyncratic solutions - a man who had ripped out his gas-fires, installed a woodburner and just 'went out with his chainsaw' to chop down a tree for example. Or that they should do a better job of promoting the many lists of 101 things you can do to cut your carbon footprint? The BBC could no doubt point to a host of programmes which do just that. Or take comfort that 37 years after H T Odum pointed out that potatoes are now partly made from oil, such prurient oil-porn is at least educating 'the public' that oil is embedded our society?

For me the real point is that even a BBC journalist who used to present *Newsnight* apparently has nothing to say against such a loopy display of contrarianism: no 'but surely' to reach for on alternatives to oil dependency, beyond his watering can. It shows that campaigners and others have failed to set a widely understood agenda for strategic change. Could this be because NGOs, like public bodies, are focused on individual 'behaviour change'?

The strategy by-pass

In April this year WWF UK published a report *Weathercocks and Signposts*⁵ which attacked 'the marketing approach to behaviour change' for leading only to 'piecemeal' results. We need big society-wide changes, argues WWF, and we won't get them from behaviour change 'campaigns' aimed at persuading individuals to take the easiest, most painless personal actions.

WWF's report is generally right about the limitations of many 'behaviour change' efforts but unfortunately its solution to this problem is to advocate what amounts to a crusade to change 'values', by which it means attitudes and behaviour. As such it adopts a High Church version of the Concerned Ethical position: people should (only) do things 'for the right reason'. This is the 'Concerned Ethical Trap'⁶: a 'trap' as this notion works for only about 10% of the population.

WWF doesn't draw the connection but the 'piecemeal' criticism is most applicable to the many attempts at 'social marketing'. Social marketing is certainly an idea whose time, or at least whose budget, has arrived. The First World Social Marketing Conference takes place in Brighton this September. UK Government Departments have been pouring money into social marketing 'campaigns', both around health, where it has a long history, and the environment, where it is firmly coupled to the mantra of 'behaviour change'. Seeing the way the contracts are flowing, communications, advertising and PR companies are increasingly developing 'social marketing offers'. I have at least one friend who now runs a 'social marketing' business for a world-famous communications company, whom I know thinks much of it is rubbish but there's money in it.

Weathercocks would be absolutely right about the piecemeal nature of change if it looked at social marketing rather than what it vaguely defines as the 'marketing approach'. Almost by definition social marketing it is not strategic. It targets the individual as the locus of change: it is personal, not systematic because it neither attempts to combine the results of individual changes, nor targets changes which have a strategic - ie game or system-changing - effect.

As argued in the Campaign Strategy newsletter⁷, while it is understandable, if undesirable, that governments may see it as justified to attempt broad-brush incremental change person-by-person, household-by-household, for NGOs to adopt the same approach, makes little sense. They, more than governments, are truly free to be strategic: to try and change the system. But you don't do that by attacking it piecemeal or randomly and this is where I part company with *Weathercocks*, for it does not even propose any sort of strategic campaigns. Of course marketing campaigns aimed at say, getting each car driver to change habits will yield piecemeal results but to achieve any sort of results they will best use marketing techniques, which *Weathercocks* derides. The significant failing is if these changes are not placed, targeted or joined up so they do produce strategic results, and if campaigners do not also design campaigns that change the system which frames the choices open to individuals⁸.

Strategic targets

Here are a few examples of possible strategic campaign targets from the climate arena:

- Energy storage technology: a number of technologies exist which could eliminate the 'intermittency' problem of renewables. Regenerable fuel cells for instance - flow batteries⁹ - have been brought to the brink of large scale commercialisation and then dropped. Given that the potential of renewable resources is far larger than the energy requirement of a country such as the UK, even without efficiency this could effectively 'cure' the problem, if you could store the energy. Hardly any government attention however goes to energy storage: it is a classic 'Cinderella'. Those making money from fuel supply - the fossil and nuclear industries - would, of course, stand to lose. This sort of basic analysis of power, processes, winners and losers does not even appear in WWF's *Weathercock* review, and nor does it in social marketing: A strategic campaign to force the introduction of storage technologies might involve the selection of a target which would change the market, competitive and investment dynamics, perhaps led by a public sector investment. 'Behaviour change' would, in this case, be focused on achieving that end, and quite likely by consumer, shareholder and political activism, not by cutting domestic carbon footprints.
- Perhaps closer to home could be a campaign to require motor manufacturers to label cars with their carbon emissions - for example as part of the registration plate. Or to equip cars with carbon emission meters by adapting their fuel monitoring. Or to put carbon content onto fuel receipts at petrol stations. In the current context all these would be likely to stimulate public discussion and the potential for social dynamics which would then drive a wave of individual behaviour change. The campaign to get there would however be intrinsically political and corporate-political, analysing the exposure, interests and cultures of competing car manufacturers. NGOs could have used the presently debated EU vehicle emissions directive¹⁰ to pursue such objectives.
- Even closer still in many EU countries might be a campaign to use the post office (national mail service) to make deliveries, as opposed to commercial delivery companies. Socially and culturally this could simply add delivered-by-the-post-office as a must-do for personal green actions but the main points of leverage would be larger scale users such as companies taking web orders and making home deliveries. While in a country like the UK, the post-office still makes many of its final house to house deliveries by a man or woman walking or cycling the street and calling at many homes, the same packet brought by the likes of DHL arrives in a large truck, often calling at just one address in many thousands. Beleaguered-feeling unions and national postal services would stand to gain.
- At the other end of the scale, there is political actualisation of the 'Carbon Logic'¹¹. This observes that there is too much fossil carbon in the ground to ever put into the sky without causing catastrophic climate change and therefore it should stay where it is. This in turn leads to the logic of a phase out of fossil fuels and the end-game of negotiating-away the use of carbon reserves. The campaign that is needed is a geopolitical one to begin the political process of what amounts to an arms-stockpile reduction negotiation. It could be done and might first require making the inevitably lengthy negotiation look like a career-making opportunity for diplomats but it is a long way from light bulbs and little to do with social marketing. We began this in Greenpeace

in the late 1990s but it was then abandoned. More recently¹² other activists have taken up the idea 'leave it in the ground' but so far on perhaps a non-strategic basis.

- Somewhere in the middle would be setting limits on carbon-content of liquid transportation fuels. NRDC has begun toying with this in the US in relation to Tar Sands¹³ - the oil-shale type sources of oil, mainly found in Canada, which are ultra-heavy in emissions due to their phenomenally polluting extraction processes. California has already proposed¹⁴ regulating a carbon weighted content for gasoline. Here the 'big actor' dynamic could be triggered by large users like regional governments and delivery companies, and the amplification could come from individual consumers.
- A populist campaign that turned the difficulties or costs of greening your home into something that the government was responsible for - eg grants or tax breaks for solar on every house roof - could turn reluctance to take personal action into a driver for regulatory change to the same end: by getting large numbers of people to join this demand you could unite those who would do it anyway with those who would not, whereas a social marketing campaign would reach only the immediately convertible and then they have no leverage to apply or much reason to give it further attention. Such campaigns create a dialectic and therefore become part of the lexicon of journalists around an issue - the 'but surely' that Jeremy Vine was sorely lacking in talking to Philip Stott. To then win and escalate such a campaign also creates political, psychological, cultural and social flow - a visible dynamic of change driven by popular mandate (the antithesis of change delivered bureaucratically and invisibly eg by Emission Trading Schemes or the UK ROC renewables system in the electricity 'pool'). This was achieved in Germany by the solar activist and politician Hermann Scheer¹⁵ where 15% of electricity now comes from renewables.

All these are just campaign concepts but all the targets have strategic significance: they would change what is possible. To turn them into campaigns that could work, requires all the steps of creating an instrumental - that is change-making - campaign: issue mapping, power-analysis, identification of allies, obstacles, changes required along a critical path and how to achieve them, researching those for political and motivational feasibility, planning and testing communications strategies to bring them about, along with assembling the other tools, activities and resources. Few of these steps are likely to involve simply calling for the end result - what has been termed 'policy literalism'. What is alarming to me is that when I recently asked one major NGO why they weren't advocating instrumental campaigns, they replied that the term was 'unfamiliar'. Perhaps some things are being forgotten?

Not all is lost

Fortunately there are still good strategic campaigns and campaigners. Take for example Rainforest Action Network <http://www.ran.org>. This American NGO specialises in highly strategic interventions designed to change markets. RAN's activities have even been written up as case studies¹⁶ used by its enemies - or at least, opponents and targets.

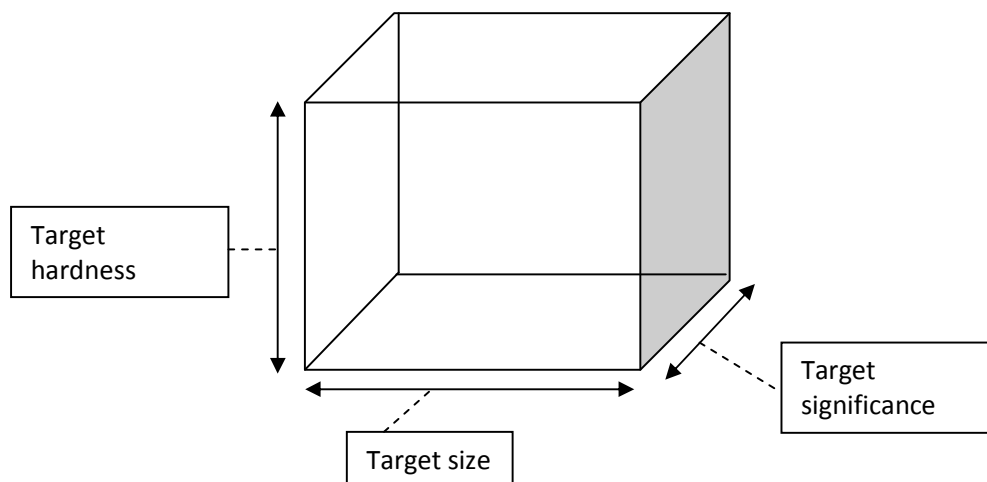
RAN has two things. First, it has an organisational campaign strategy¹⁷: a defined and defining way of doing campaigns, in its case targeting corporations, using consumer influence to affect competitive positioning to lever company policy change on products affecting rainforest. RAN has developed the assets and resources needed to do these sorts of campaigns and elevated them to a fine art. Second, and less obvious, RAN invests heavily in strategic analysis. It is here that many NGOs, or some in NGOs, now seem to be parting company with the strategic approach epitomised by RAN, in favour of the vaguer territory of personal behaviour change, or the mostly data-free zone of unmeasurable 'values'.

WWF too runs some strategic campaigns, and in the UK a coalition of NGOs has clubbed together to oppose both expansion of Heathrow - strategic in a large number of ways - and a new coal fired power station at Kingsnorth in Kent.

Yet many things described as 'campaigns' are no longer strategic, although many seek 'systematic' even population-wide change. The concept of strategy has easily softened, becoming dislocated from the disciplines and processes which distinguish a strategy from a plan, an instrumental campaign from a set of ambitions for how the world should be. Many NGOs are legendary as campaigners but is it a myth that much of their work is strategic?

The Ambition Box

One tool which might help even the more adventurous social marketers and certainly NGO and public sector 'campaign' planners to select their targets may be the 'Ambition Box'. In *How To Win Campaigns*¹⁸ and at this website¹⁹, I use the 'Ambition Box' tool to distinguish between targets picked because they are strategic (back of the box) and those which are not (front of the box). The three dimensions of this campaign 'target space' are size (amount of the overall problem), hardness (difficulty of achieving change to the target) and significance (the 'knock-on' consequence of achieving the change).



Target size is, at least at first glance, relatively easy to measure: For example, the number of people many people we need to get food to. There might be several countries or towns or refugee camps to target. Similarly hardness: some places or groups may present more

problems than others. Or we might be seeking a change in the law about human rights. Some changes will be easier than others.

Target significance is usually trickier to decide²⁰. Identifying a change which is system-changing requires a predictive knowledge of the system under consideration. A well-known example was Greenpeace's indirect strategy for attacking the nuclear industry, by focussing on waste reprocessing, as an intervention in the 'fuel cycle'. In the case of the Brent Spar campaign, the Brent Spar itself was a test-case for a loophole in the law, which if passed, would have enabled the oil industry to dump large amounts of structures at sea. The significance of the target was therefore far larger than the immediate impact of that particular instance of proposed dumping.

Understanding an industrial or legal system to identify significance is one thing. Understanding a social process, with no set categories or institutional machinery to try and manipulate, is another.

RAN excels at the former, for example in its analysis and understanding of the soya, palm oil and timber industries, and the finance industry that supports their exploitation. They map in detail, who owns who, who's buying from whom, what the value added is along a supply chain, company structures and decision-making, down to key individuals. From what I have seen of their planning system I would guess that they typically devote maybe an order of magnitude more effort to such analysis than most groups working on the same 'issue'. For instance campaigns run by Friends of the Earth (FoE) are also often well researched but they are much more concerned with making an impact on policy and arguments - "the issue" - than getting a specific instrumental result in terms of a strategic change. Both WWF and FoE more tend to set objectives and then rely on 'advocacy' to try and steer support towards that end. A case where FoE had a clearer idea of how to get the result was *The Big Ask* campaign because the machinery already existed in the shape of the formal political system (see Campaign Strategy newsletter No 36).

Isolating a social target which is of strategic significance is an altogether more slippery process. Tempting shortcuts involve targeting 'influential' individuals such as 'decision makers', ABs or celebrities but even if they are influential this can fail or backfire if the reasons for them having influence over others are not understood. This is where we have to turn to social models, and to qualitative research to try and find out how people think, and what might motivate them to take the desired action, as well as looking at cultural and social dynamics. People like Malcolm Gladwell, author of *The Tipping Point*, have written about how ideas and behaviours spread but relatively few have a usable, testable model of cultural dynamics.

This is one reason why I have long been an advocate of the CDSM Values Modes model, much discussed in Campaign Strategy newsletters²¹, which is founded in hundreds of thousands of quantified and cross-correlated responses to questions which get at motivational needs independent of behaviour. It segments people into the three main Maslowian Groups and within that the 12 Values Modes, and is now integrated with data sets across many countries.

Escalating engagement

Campaigning or not, many of my clients want to increase 'public engagement'. By this they may mean people becoming more involved, or more frequently involved in their projects or programmes, or more people becoming involved, or receiving better scores on proxy tests such as questions about how people feel about the organisation or project. This often combines with attempts at 'behaviour change'.

I recently attended a long discussion with many staff from a large NGO. Like others before it, their organisation had taken a strategic or at least high level decision to 'increase public engagement'. They had commissioned segmentation research to look at what people did and put them into 'types' determined mainly by measuring their behaviour. They were then trying to find ways to get them to do more of the same, or new things, and we were discussing the use of Values Modes. This meant either matching offers to the psychological needs - such as for Settlers, security, safety, identity, belonging, or for Prospectors the esteem of others or self-esteem, or for Pioneers, holism, new experiences and ideas - or using the dynamics between groups.

Some of the people I was working with made much the same point as Tom Crompton does in *Weathercocks*. They didn't want to either change their programmes to suit needs of say Prospectors, or to use the cultural dynamics by say getting Pioneers to take up a new behaviour and design ways to encourage Prospectors to copy them. They wanted people to do 'green' things for the 'real reasons', or as they put it, 'the deeper reasons' or the 'genuine' reasons. These 'deeper' reasons were equated with 'deeper engagement' and generally meant finding and acting on lots of connections.

Not surprisingly this was causing some difficulties for the marketers involved because it implied getting Prospectors, or Settlers, to become Pioneers. What seemed to the staff involved to be 'simply' deeper, or seemed to be reasons available or making sense to anyone once they had been induced to think about them, were in reality different values. Value sets in the CDSM model are defined by over 90 different Attributes so this is a gross simplification but to take an example, a Pioneer and a Prospector might do the same thing (eg buy a greener car) but to meet different needs. The Pioneer might be a Concerned Ethical (whose logic is adopted fairly consistently in the *Weathercocks* report) and see it as a choice driven by the need to be a better person for ethical, global reasons and live a better life - his 'real reasons'. The Prospector might do it because they wanted to do the right thing, to make the right choice but 'right' defined in terms of what is fashionable, trendy, esteemed. The point is that both lots of reasons are equally 'real'.

Words like 'fashionable' or 'shallow' are sometimes used by Pioneers as put-downs, just as 'worthy' or 'dull' is often a Prospector put down of Pioneers. Here my client was setting itself an unconscious objective of getting Prospectors to undertake actions for Pioneer reasons - as they were about 90% Pioneers themselves, this went largely un-noticed. Internal hierarchies, group dynamics and debate naturally tended to make decisions which made sense in Pioneer terms only: the majority, in this case, was wrong, if they wanted to reach beyond just their own values set.

The lesson is therefore that if you want to increase engagement you must do it within values-needs sets, not across them. People can be 'promoted' in terms of frequency, duration or scale of action but that escalation needs to resonate with their needs.

Here are the basic Maslow Group orientations from Pat Dade at CDSM:

Settler (Security Driven)

Past – low self agency
Keep the same
Rational
Keep to the facts
Group identity
Judgemental
Keep it simple
Local
Security and family

Prospector (Outer Directed)

Future – variable self-agency
Doing it better
Emotional
Use the rules to break the rules
Being individual in a group
Opportunities rather than connections
Looking better or best
Soundbites of stories – can be global or local
Me, me, me

Pioneer (Inner Directed)

Now – high self-agency
Open to change
Emotional (and rational)
Personal ethical responsibility
Everything connects
Individualistic
Keep it complex and interesting – global
Intimate personal true stories

These sets of 'meta' attributes show what the 'thing' needs to be like for the different groups. The conservatism of the Settlers also means that 'more' is likely to mean more of the same, or at least it should seem and feel to be more of the same. Escalation for Prospectors tends to mean bigger, better, best where these can also mean 'the latest'. For Pioneers it may mean new layers and reveals of connection and complexity, as well as innovation. But whether your 'model' of engagement involves a 'pathway', a funnel, a ladder, a pyramid or a 'journey' - they're all in use at the moment - there really needs to be a separate one for each Maslow Group: even if the same 'stuff' appears on more than one of them, it has to do different things for different people. Revealing to them that the 'real' meaning of the behaviour is something outside their values set, will cause them to disengage.

¹ Galadriel, *The Fellowship of the Ring*, J R Tolkien

² see website <http://www.campaignstrategy.org>

³ available on 'listen again' over an hour into the programme – Tuesday 17 June BBC Radio 2 Jeremy Vine Show
<http://www.bbc.co.uk>

⁴ He denies being a denier see http://www.sourcewatch.org/index.php?title=Philip_Stott and
<http://risingtide.org.uk/hallofshame>

⁵ At http://www.wwf.org.uk/core/ge_0000004945.asp report by Tom Crompton

⁶ *Research Into Motivating Prospectors, Settlers and Pioneers To Change Behaviours That Affect Climate Emissions*
Chris Rose (Campaign Strategy) with Pat Dade (Cultural Dynamics) and John Scott (KSBR) at
http://www.campaignstrategy.org/articles/behaviourchange_climate.pdf

⁷ For example edition 33: "the 'social marketing' approach, much in vogue for the UK government, is ultimately limited. It will help with identifying audiences, channels and contexts but it provides little or no useful insight into motivation. Nor is it strategic, analysing power and changing the context, actors, allies or obstacles in the way that good campaigns do".

⁸ It has long been pointed out that 'market' or individual-choice solutions have limited traction and suasion, for example by Fred Hirsch in *The Social Limits to Growth* (1972) who evidences transport and other examples in which the consumer can choose but not between say a poor bus service and a good one, only a car journey or the poor bus service. This is the 'tyranny of small choices' because the big choice is not posed.

⁹ For example the Regenesys technology invented in Harwell, widely heralded a breakthrough and brought to the point of large scale application in the Tennessee valley by previous owners RWE before being mysteriously dropped for 'commercial reasons' – now owned by Canadian company VRB

¹⁰ EU Commission Proposal (COM (2007) 817 Final)

¹¹ See *The Turning of the Spar*, Chris Rose, Greenpeace 1998 and Bill Hare at
<http://archive.greenpeace.org/climate/science/reports/carbon/clfull-1.html>

¹² http://news.bbc.co.uk/1/hi/england/north_yorkshire/7452395.stm and
<http://www.earthfirst.org.uk/leaveitintheground/>

¹³ http://www.nrdc.org/naturesvoice/campaign1_pg3.asp

¹⁴ http://www.greencarcongress.com/2007/01/california_gove.html

¹⁵ Interview: Bring on the solar revolution 21 May 2008 Fred Pearce *New Scientist* Magazine issue 2657
<http://www.newscientist.com>

¹⁶ See for example <http://www.caseplace.org/d.asp?d=199>
<http://depts.washington.edu/ccce/assets/documents/rachelwilson/consumerlogic.pdf>
<http://www.jgpress.com/inbusiness/archives/free/000603.html>

¹⁷ See http://www.campaignstrategy.org/newsletters/ambition_box.doc and
http://www.campaignstrategy.org/commentary_on_the_death_of_environmentalism.doc

¹⁸ *How To Win Campaigns*, Earth scan, 2005 Chris Rose

¹⁹ http://www.campaignstrategy.org/newsletters/ambition_box.doc

²⁰ For examples see *How To Win Campaigns* p 81

²¹ See also *Using Values Modes* at <http://www.campaignstrategy.org>