Introduction to Social Marketing Planning

A proven planning process to developing a customized and structured social marketing plan for your organization

Session Leader:

Jim Mintz,
Managing Partner, CEPSM
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INTRODUCTION

Welcome to Introduction to Social Marketing Planning. Influencing opinion and changing behaviour is becoming increasingly important. Social marketing seeks to influence and change behaviour to benefit the target audience and society at large. The primary problem facing many public sector and nonprofit managers who want to develop a social marketing plan is information overload. Today managers have access to more information than they can absorb and are often under pressure to have the plan done "yesterday".

This workbook has been designed not only for social marketers, but also for those involved in planning marketing strategies. It will be very relevant to those responsible for efforts focused on influencing attitudes and behaviours that may improve health, prevent injuries, protect the environment, improve money management practices, prepare citizens for emergencies, and a multitude of today's issues.

One of the biggest challenges in social marketing planning is the implementation stage. Many organizations develop great plans, but poor execution leaves them wondering why they didn't achieve the desired results. In previous editions of this workbook we took participants through a proven process for developing their social marketing strategy and plan. This workbook shows you how to transform strategies into action! In this tough economy it's important to ensure maximum impact for marketing dollars, especially when you are moving from planning into implementation where the majority of your budget will be allocated.

The information and tools you will acquire throughout this workbook will not only help you achieve your organization's social marketing outcomes, but help increase the overall credibility of social marketing through the application of proven marketing concepts and processes.

This workbook has been designed to provide you with an end-to-end planning tool that lays the groundwork for a successful social marketing program. While there are many variations in the processes that can be used for developing a social marketing plan, this workbook is based on more than 30 years of direct experience in the social marketing arena, and will serve as a useful tool for marketing professionals that want a structured program that encourages critical thinking and action in key strategic areas. We look forward to working with you to help you realize your social marketing outcomes.

The information contained in this workshop was developed using the Health Canada e-learning tool (http://www.healthcanada.gc.ca/socialmarketing) and the following resources:


Also special thanks to my colleagues at CEPSM for assisting me in developing the workbook especially Mike Kujawski and Bernie Colterman and my former colleagues at Health Canada, particularly Lorna Bonvie who worked with me on the e-learning tool. Finally thanks to our client at Public Safety Canada who we worked with on the development of the "Get Prepared" campaign.

Sincerely,
James (Jim) H. Mintz

Managing Partner
Centre of Excellence for Public Sector Marketing
300-205 Catherine Street Ottawa, ON K2P 1C3
DISCLAIMER

Unless otherwise specifically stated, the Social Marketing Planning Workbook contained herein belongs to the Centre of Excellence for Public Sector Marketing (CEPSM). CEPSM does not assume any legal liability or responsibility for the accuracy, completeness, or usefulness of any information, product or process disclosed in these examples. The intent is to show a proven, strategic process that can be used to develop a social marketing strategy for your organization. Reference herein to any specific commercial product, process, service by trade name, trademark, manufacturer, or otherwise, does not constitute or imply its endorsement, recommendation, or favouring by CEPSM or any entities thereof.
STRATEGY BEFORE TACTICS

ABOUT CEPSM

The Centre of Excellence for Public Sector Marketing (CEPSM), launched in 2005, helps public sector and nonprofit organizations overcome the unique challenges they face in their marketing and communications initiatives. The mission of CEPSM is “To advance the marketing discipline in the public and nonprofit sectors”. We provide our clients with expert marketing advice through consulting, training and speaking.

CEPSM has a proven synergy and strong reputation in the nonprofit and public sector for delivering strategic marketing solutions. Our results-oriented team has many years of experience in developing social marketing plans and strategies for public sector and nonprofit organizations, and has a full understanding of both the limitations and benefits of implementing social marketing strategies in these environments.

Our core competencies of expertise include:

- Product, Program & Service Marketing
- Digital Marketing & Social Media Engagement
- Sponsorship & Partnership Development
- Revenue Generation
- Social Marketing

What makes us unique?

We understand the needs and constraints of the public and nonprofit sectors and offer solutions that fit your environment.

Learn more about how we can help you achieve your goals more efficiently and effectively!

Connect with us
Website: http://www.cepsm.ca
E-mail: jimmintz@cepsm.ca
Phone: 613 230 6424 #223
Twitter: @jimmintz

“If you think it's expensive to hire a professional to do the job, wait until you hire an amateur.”

– Red Adair
SESSION LEADER BIOGRAPHY

James (Jim) H. Mintz  
Managing Partner  
Centre of Excellence for Public Sector Marketing

Jim Mintz is the Managing Partner of the Centre of Excellence for Public Sector Marketing where he presently works with a number of public sector and nonprofit clients. He is also Program Director of the Professional Certificate in Public Sector and Nonprofit Marketing at the Sprott School of Business at Carleton University. Jim previously lectured for many years in the undergraduate program at Sprott in his specialty areas of marketing communications and nonprofit/public sector marketing.

He presently lectures in the area of nonprofit and public sector marketing at the University of South Florida, College of Public Health (Tampa). He was formerly Adjunct Professor of Marketing in the School of Management at the University of Ottawa where he taught promotional management (marketing communications) and consumer behaviour at both undergraduate and graduate levels (MBA). He presently serves on the External Advisory Council for the School of Public Health at the University of Alberta. He has also served on the Treasury Board Secretariat Committee responsible for the development of the Federal Government Communications Policy.

Jim was formerly the Director of Marketing and Corporate Communications at Health Canada. His responsibilities included directing marketing and communications campaigns in a number of health areas. He was also responsible for all marketing communications (advertising), strategic alliances and partnerships in the marketing area (publishing, exhibits, audio-visual and web services at www.healthcanada.gc.ca) and led the development of the Canadian Health Network. He also developed a bilingual e-learning social marketing tool for health professionals and the public.

Jim served on the Professional Chapters Council of the American Marketing Association (AMA) International in Chicago and was President of the AMA Chapter in the National Capital Region. He also served on the editorial board of Marketing News and was former Co-Chairman of AMA Marketing Week. His team at Health Canada was awarded the AMA Marketer of the Year Award.

He has a varied academic educational background in the fields of marketing, advertising and public administration, which include diplomas in both advanced marketing management and advertising. He has provided public sector marketing advice and consultation across Canada, USA, Europe, Australia, and presently in Tanzania (Africa).

In addition to working on health issues, Jim has been involved in federal government marketing and communications initiatives in areas such as environment, energy conservation, public safety and identity theft. He has also consulted in the area of “branding” for a number of public sector organizations, as well as providing expertise in partnerships and strategic alliances and public sector marketing of products and services. In 2009, with co-author Joanna Chan, Jim published the Guide to Branding in the Public and Not-For-Profit Sectors. Most recently his organization has become involved in social media marketing and digital engagement for public sector and nonprofit organizations.

Prior to joining the federal government he held marketing positions in the private sector and crown corporations. He was Advertising Coordinator at Eaton’s (Montreal) and Manager, Advertising and Promotion at Canada Post Corporation (Retail Division). As well, his past experience includes working at a large advertising agency. Mr. Mintz is fluent in both English and French (Government designation CCC). He is also has Federal Government Level II Secret security clearance.

“The great thing about marketing is that it takes an hour to learn and a lifetime to master”

– Phil Kotler, Northwestern University
LET’S GET STARTED!
**BACKGROUND**

The social marketing plan begins with the following:

- Who is the sponsor for the initiative and why have they decided to initiate the campaign?
- What is the social issue being addressed and why?
- Background facts on the issue are listed to justify the need for a campaign.

**Example 1**

A social marketing plan on tobacco control could support the need for a campaign with facts about the health effects of smoking, such as: There is strong scientific evidence that smoking is related to more than two-dozen diseases and conditions. The average smoker will die about eight years earlier than a similar non-smoker. Children regularly exposed to second-hand smoke (SHS) are at least 50% more likely to suffer damage to their lungs and breathing problems.

1. What is the issue to be addressed by the social marketing campaign and why is this issue of concern?

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**DEFINING THE ISSUE**

When defining the issue you should include:

- The campaign focus - the behaviour change you wish to promote. The campaign focus should satisfy a need in the public that is not being fulfilled by other organizations and should relate closely to your organization's mission and culture.
- The purpose of the campaign - the intended impact of a successful campaign.

**Example 1**

For an anti-tobacco campaign the campaign focus options may include:

- Smoking cessation for adults
- Preventing youth from starting to smoke
- Prevention of children being exposed to second-hand smoke in homes and cars
- The purpose of a campaign on tobacco, with a focus on preventing youth from starting to smoke could include the reduction of:
  - Respiratory health conditions, such as asthma
  - Cancer
  - Heart disease rates
2. What is the behaviour change that you will promote (i.e. the campaign focus)?

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3. What is the intended impact of a successful campaign (i.e. the campaign purpose)?

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ENVIRONMENTAL SCAN

An environmental scan is a synopsis of research on external factors that could affect your campaign, such as:

- Other campaigns
- Policies
- Laws
- Social norms

The information gained in research helps to determine trends, populations in need and how your campaign can be made most effective.

In the environmental scan you will document the activities of other organizations working in the same domain. Various levels of government, non-profit organizations and the private sector may be delivering messages to the public about the same issue. Some messages may complement your own, while others may be competing messages. You should know how other messages could influence those you are trying to reach. An environmental scan may also help you learn about opportunities for collaboration with other organizations.

Best Practices and Lessons Learned

Example

In 2002 Health Canada was developing a campaign on smoking cessation aimed at adults aged 40-55. Health Canada learned of a campaign promoting the Arizona Smokers Helpline. This campaign was reaching and motivating a similar target audience to the planned Health Canada campaign. The Arizona campaign was based on Prochaska and DiClemente's stages of change model (this model is explained in the Market Segmentation and Target Marketing section). A series of advertisements featured a man in his 40's, the stages he experienced while quitting smoking and encouraged viewers to call the Arizona Smokers Helpline.

This campaign was the inspiration for a series of Health Canada television advertisements that follow "Bob", an average Canadian, as he quits smoking. Bob is a fictional character based on an "average" Canadian smoker. The "call to action" of the campaign asks the target audience to order a booklet, On the Road to Quitting or to visit the web site www.gosmokefree.ca.

Using research on the activities of other organizations and analysis of your organizations past campaigns, you can figure out what has worked in the past. If available, evaluations of past campaigns are a great source of information. Include this knowledge in your environmental scan as "best practices" or "lessons learned".

The following questions should be completed in more detail when you get back to the office:

4. What other organizations are addressing or have addressed this issue?
5. What approaches have been used to address the issue?

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6. How have messages from other organizations affected the population?

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7. Are there "best practices" or "lessons learned" that should be taken into consideration?

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PEST ANALYSIS

PEST analysis is concerned with the environmental influences on a campaign.

The acronym stands for the Political, Economic, Social and Technological issues that could affect the strategic development of a campaign. Identifying PEST influences is a useful way of summarizing the external environment for a campaign. However, it must be followed up by how a campaign should respond to these influences. PEST analysis uses four perspectives that give it a logical structure. The PEST analysis is used for assessment and decision-making, and encourages proactive thinking rather than relying on habitual or instinctive reactions.

PEST Analysis is a useful tool for understanding the ‘big picture’ of the environment in which you are operating, and for thinking about the opportunities and threats that lie within it. By understanding your environment, you can take advantage of the opportunities and minimize the threats.

By making effective use of PEST Analysis, you ensure that what you are doing is aligned positively with the forces of change that are affecting our world. By taking advantage of change, you are much more likely to be successful than if your activities oppose it.

The PEST analysis template is presented as a grid, comprising of four sections, one for each of the PEST headings (example issues provided):

<table>
<thead>
<tr>
<th>POLITICAL</th>
<th>ECONOMIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ecological/environmental issues</td>
<td>Economic situation and trends</td>
</tr>
<tr>
<td>Current and future legislation</td>
<td>Seasonality/weather issues</td>
</tr>
<tr>
<td>Regulatory bodies and processes</td>
<td>Specific business factors</td>
</tr>
<tr>
<td>Government policies</td>
<td>Market and distribution trends</td>
</tr>
<tr>
<td>Government term and change</td>
<td>Client/stakeholders drivers</td>
</tr>
<tr>
<td>Funding, grants and initiatives</td>
<td></td>
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<tr>
<td>Lobbying/pressure groups</td>
<td></td>
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<tr>
<td>Wars and conflict</td>
<td></td>
</tr>
</tbody>
</table>

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- Lifestyle trends
- Demographics
- Consumer attitudes and opinions
- Media views
- Law changes affecting social factors
- Brand, organization, technology image
- Consumer buying patterns
- Role models
- Major events and influences
- Ethnic/religious factors
- Ethical issues

- Technology development
- Technology/solutions
- Information and communications
- Client purchasing mechanisms/technology
- Technology legislation
- Innovation potential
- Technology access

PEST is useful before SWOT (generally not vice-versa) because PEST helps to identify SWOT factors (specifically Opportunities and Threats).
8. What are the political, economic, social and technological factors that could affect the outcome of the campaign?

Political

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Economic

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Social

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Technological

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SWOT Analysis

After the issue has been defined and the PEST analysis completed, you can develop a summary of internal strengths and weaknesses and the external opportunities and threats that could affect the campaign. Analysis of these factors is known as a SWOT analysis (Strength, Weaknesses, Opportunities and Threats).

- Internal strengths and weaknesses are things like human and financial resources, expertise, management support, internal politics and issue priority.
- External opportunities or threats include cultural norms, demographics, economics, political or legal issues and the activities of external organizations. Most of these usually come from your PEST analysis.
- SWOT Analysis is a simple useful framework for analyzing your organization's strengths and weaknesses, and the opportunities and threats that you face. It helps you focus on your strengths, minimize threats, and take the greatest possible advantage of opportunities available to you.
- What makes SWOT particularly powerful is that, with a little thought, it can help you uncover opportunities that you are well placed to exploit. And by understanding the weaknesses of your organization, you can manage and eliminate threats that would otherwise catch you unawares.

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Capabilities of campaign team</td>
<td>• Gaps in capabilities</td>
</tr>
<tr>
<td>• Resources, assets, people</td>
<td>• Reputation, presence and reach</td>
</tr>
<tr>
<td>• Experience, knowledge, data</td>
<td>• Financials</td>
</tr>
<tr>
<td>• Budget available to campaign</td>
<td>• Timescales, deadlines and pressures</td>
</tr>
<tr>
<td>• Marketing expertise</td>
<td>• Effects on core activities</td>
</tr>
<tr>
<td>• Innovative aspects</td>
<td>• Reliability of data, plan predictability</td>
</tr>
<tr>
<td>• Location and geographical</td>
<td>• Morale, commitment, leadership</td>
</tr>
<tr>
<td>• Processes, systems, IT, communications</td>
<td>• Processes and systems, etc.</td>
</tr>
<tr>
<td>• Cultural, attitudinal, behavioural</td>
<td>• Internal politics and issue priority</td>
</tr>
<tr>
<td>• Management support</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Technology development and innovation</td>
<td>• Political effects</td>
</tr>
<tr>
<td>• Global influences</td>
<td>• Legislative effects</td>
</tr>
<tr>
<td>• New markets, vertical, horizontal</td>
<td>• Environmental effects</td>
</tr>
<tr>
<td>• Niche target markets</td>
<td>• IT developments</td>
</tr>
<tr>
<td>• Information and research</td>
<td>• New technologies, services, ideas</td>
</tr>
<tr>
<td>• Partnerships, agencies, distribution</td>
<td>• Sustaining internal capabilities</td>
</tr>
<tr>
<td></td>
<td>• Obstacles faced</td>
</tr>
<tr>
<td></td>
<td>• Insurmountable weaknesses</td>
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<tr>
<td></td>
<td>• Loss of key staff</td>
</tr>
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<td></td>
<td>• Sustainable finances</td>
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</table>
Example

A campaign on healthy living and sport participation may have the following strengths, weaknesses, opportunities and threats.

**Strengths**

- Healthy living and sport participation is high on the political agenda.
- There is existing knowledge and expertise on these topics in Health Canada and Government of Canada.

**Weaknesses**

- An integrated healthy living and sport participation has never been undertaken before at the federal level.
- Uncertainty of long-term funding.

**Opportunities**

- The 2010 Olympic and Paralympics Games are being hosted in Canada; opportunities may exist to build on to this event.
- Opportunity to build on past success of programs like Participation & Vitality

**Threats**

- Competition and alternative messaging from sources, such as the private sector or media.
- Food companies, NGO's and other levels of government deliver messages on healthy eating and physical activity. Any new campaign would need to find a way to grab the attention of the target audience.

Note: Some opportunities can also be threats!

9. What are the internal strengths and weaknesses and external opportunities and threats that could affect the outcome of the campaign?

**Internal Strengths**

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Internal Weaknesses

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External Opportunities (these should come from the PEST analysis)

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External Threats (these should come from the PEST analysis)

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The SWOT/TOWS Matrix

SWOT or TOWS analysis helps you get a better understanding of the strategic choices that you face. It helps you ask, and answer, the following questions: How do you:

- Make the most of your strengths?
- Circumvent your weaknesses?
- Capitalize on your opportunities?
- Manage your threats?

<table>
<thead>
<tr>
<th>OPPORTUNITIES</th>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>S-O strategies</td>
<td></td>
<td>W-O strategies</td>
</tr>
<tr>
<td>S-T strategies</td>
<td></td>
<td>W-T strategies</td>
</tr>
</tbody>
</table>

- Strengths and Opportunities (SO) – How can you use your strengths to take advantage of the opportunities?
- Strengths and Threats (ST) – How can you take advantage of your strengths to avoid threats?
- Weaknesses and Opportunities (WO) – How can you use your opportunities to overcome the weaknesses you are experiencing?
- Weaknesses and Threats (WT) – How can you minimize your weaknesses and avoid threats?

10. What are some potential SWOT/TOWS strategies for your campaign?

S-O strategies

______________________________________________________________________________________

______________________________________________________________________________________

W-O strategies

______________________________________________________________________________________

______________________________________________________________________________________

S-T Strategies

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______________________________________________________________________________________

W-T Strategies

______________________________________________________________________________________
SEGMENTING THE MARKET

Markets can be populations of:

- Individuals
- Groups
- Organizations

Market segmentation is the division of the total market into relatively homogeneous but distinct segments. It is used to identify target audiences and strengthen a campaign’s effectiveness in reaching selected segments. Segments usually respond to campaign elements differently and different techniques are required to reach and motivate various segments. Some ways to segment a population are:

- **Geographically**: counties, cities, census tracts, neighborhoods, north, south, climate
- **Demographically**: age, life-cycle, gender, level of education, nationality, income, cultural background, religion, language, occupation, urban, rural, suburban
- **Psychographically**: constellation of attitudes, beliefs, values, opinions, hopes, fears, prejudices, needs, desires, social norms, social class, personality traits, stage of change that, taken together, govern how one behaves. Developed by market researchers to help identify consumer behaviour patterns, its focus is on the relationship between psychographic type and specific behaviours.

A great example of segmentation can be found by browsing through the Environics Analytics PRIZM C2 Clusters. This is essentially a segmentation of the entire Canadian population based on many years of compiled primary research data. For more information: [http://www.environicsanalytics.ca/](http://www.environicsanalytics.ca/).

With its 66 lifestyle types, PRIZM C2 provides insights into the behaviour and mindset of Canadian consumers. The second generation of popular segmentation system, PRIZM C2 has been updated with the 2006 Census, newly released social values research and 2009 Demographic Estimates and Projections.

The top three segments of the Canadian population:
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Stages of Change Model

<table>
<thead>
<tr>
<th>STAGE</th>
<th>CHARACTERISTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRE-CONTEMPLATION</td>
<td>• No intention to change behaviour</td>
</tr>
<tr>
<td></td>
<td>• In denial or uninformed of the need to change</td>
</tr>
<tr>
<td>CONTEMPLATION</td>
<td>• Acknowledge problem and beginning to think about change</td>
</tr>
<tr>
<td>PREPARATION</td>
<td>• Plan to take action within the next month and make adjustments before behavior change</td>
</tr>
<tr>
<td>ACTION</td>
<td>• Modify behaviour and surroundings to facilitate change</td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>• Work to consolidate the gains attained during action phase</td>
</tr>
<tr>
<td></td>
<td>• Struggle to prevent lapses and relapse</td>
</tr>
<tr>
<td>TERMINATION</td>
<td>• New behaviour is fully adopted</td>
</tr>
</tbody>
</table>

Example 1

Health Canada conducted a survey on attitudes and behaviours related to healthy eating, physical activity and sport participation in preparation for a campaign on healthy living. Part of the research was a psychographic analysis, which segmented the market based on:

- Current behavior
- Perceptions of the benefits of healthy eating and physical activity
- Need for information on healthy living subjects
- Current actions/intentions to improve their families’ health

Four different segments with different levels of commitment to healthy living and with different information needs were identified:

- Gold Medalists - Low information needs, highest commitment to healthy living
- Status Quo - Moderate information needs, high commitment to healthy living
- Info Seekers - High information needs, high commitment to healthy living
- Skeptics - Moderate information needs, lowest commitment to healthy living

The two groups Health Canada selected as target audiences are the Status Quo and the Info Seekers groups, as they were in a position to make improvements and were responsive to change.

---

Another well-known Health Canada segmentation analysis was conducted for the “Really Me!” campaign. The campaign was designed to prevent illicit drug use among 11 to 13 year olds. A psychographic analysis of youth for the campaign identified seven lifestyle groups segmented based on their views regarding: work ethic, family values, current drug use behaviour, tendency to follow others, and their futures. The groups were as follows:

<table>
<thead>
<tr>
<th>GROUP</th>
<th>CHARACTERISTICS</th>
</tr>
</thead>
</table>
| TGIFS (THANK GOD IT’S FRIDAY’S) | • Less ambitious and disciplined  
                                  | • Substance use/abuse tends to be part of the TGIF lifestyle |
| TOMORROW’S LEADERS           | • Ambitious; Leaders not followers  
                                  | • Optimistic about future  
                                  | • Tend to be against smoking |
| QUIET CONFORMERS             | • Strong work ethic and social conscience  
                                  | • Follow rather than lead  
                                  | • Against smoking and other substance abuse |
| CONCERNED MORALISTS          | • Very traditional attitudes toward family, sexuality, etc.  
                                  | • Follow rather than lead  
                                  | • Need the support and approval of others |
| PASSIVE LUDDITES             | • More tolerant of, if not involved in, substance use/abuse  
                                  | • Some degree of independence, but concerned about how one seen by others |
| SMALL TOWN TRADITIONALISTS   | • Traditional attitudes and beliefs  
                                  | • Ambitious; Self-confident  
                                  | • Anti-substance use/abuse |
| BIG CITY INDEPENDENTS        | • Independent  
                                  | • Not easily influenced  
                                  | • "Loners" more than team player  
                                  | • Wide range of substance-use behaviours |
A more recent analysis of youth aged 12 to 18 years identified three psychographic groups based on drug use attitudes and behaviour, particularly the use of marijuana.

<table>
<thead>
<tr>
<th>GROUP</th>
<th>CHARACTERISTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVE SEGMENT</td>
<td>• Larger percentage of older youth</td>
</tr>
<tr>
<td></td>
<td>• Willing to experiment with drugs</td>
</tr>
<tr>
<td></td>
<td>• Highest proportion of friends that use drugs</td>
</tr>
<tr>
<td>CONTEMPLATORS SEGMENT</td>
<td>• Equally split between younger and older teens</td>
</tr>
<tr>
<td></td>
<td>• Some use marijuana, but infrequently</td>
</tr>
<tr>
<td></td>
<td>• Least likely to be leaders</td>
</tr>
<tr>
<td>INACTIVE SEGMENT</td>
<td>• Least likely to have tried marijuana</td>
</tr>
<tr>
<td></td>
<td>• Believe that drug use is dangerous</td>
</tr>
<tr>
<td></td>
<td>• Majority prefer not to be with those that use drugs</td>
</tr>
</tbody>
</table>

11. How are you going to segment your market (e.g. geographically, demographically or psychographically)?
IDENTIFYING TARGET AUDIENCES

Target marketing involves breaking a market into segments and then concentrating your marketing efforts on one or a few key segments. Target marketing can be the key to success to a social marketing campaign. Target marketing will provide a focus for all of your marketing activities, particularly the promotion and place/distribution components.

TARPARE Model for selection of Target Audiences

TARPARE (Donovan, 1999) is a useful and flexible model for understanding the various segments in a population of interest and for assessing the potential viability of interventions directed at each segment. TARPARE is an acronym for the assessment criteria to consider when choosing a target audience. The model is particularly useful when there is a need to prioritize segments in terms of available budgets.

This model helps the social marketing practitioner to systematically compare and select what might be appropriate target groups when there are a number of segments competing for attention and resources.

IMPLICATIONS

The TARPARE model provides a disciplined approach to target selection and forces consideration of what weights should be applied to the different criteria, as well as how these might vary for different issues or objectives. TARPARE also assesses segments in terms of an overall likelihood of optimal impact for each segment. Targeting high scoring segments is likely to lead to greater program success than targeting low scoring segments.

TAPARE is generally applied after a number of segments have been identified within a particular area of interest (e.g. stages of change, pre-contemplators, contemplators, etc.)

These factors can be measured quantitatively through surveys and questionnaires or qualitatively through such processes as focus groups. Sometimes large-scale surveys are necessary to determine the proportions of the total population falling into each of the segments, their demographics, media habits, lifestyle variables, risk factor profiles, and other relevant beliefs and attitudes. However, even with quantitative data on these attributes, the assignment of weights remains subjective and dependent on the social marketing practitioner.

TARPARE assesses previously identified segments on the following criteria:

<table>
<thead>
<tr>
<th>INITIAL</th>
<th>CRITERIA</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>T</td>
<td>Total number of people in the segment</td>
<td>Segments encompassing larger groups of individuals are more attractive. In general the greater the number of people, the higher the priority of the segment. This criterion is particularly important for mass interventions where small percentage shifts in large proportions of the population yield substantial benefits. (Requires statistical/epidemiological data.)</td>
</tr>
</tbody>
</table>
| AR      | At Risk  | Segments at higher levels of risk should be given priority. This includes a number of factors:  
- An assessment of what proportions of the segments are classified as "low", medium" or "high risk" with respect to the issue under consideration  
- An assessment of associated risk factors  
- An assessment of expected benefits of risk reduction in the segment  
(Requires statistical/epidemiological data) |
Introduction to Social Marketing Planning

A segment that is easily persuaded to change (low-hanging fruit) should be given higher priority, as it will take fewer resources to establish a behaviour change. This refers to a consideration of how feasible it would be to change attitudes and behaviour in the segment. In general, the more persuadable, the more likely an intervention can be cost effective and the higher the priority.

(Requires an estimate based on attitudinal research)

Target audiences that are easier to reach with messages are more attractive as less work and fewer resources will be needed to make an impact. This refers to how easy it is to reach the segment via communications or other channels, such as worksites, community centres, shopping malls, entertainment venues, schools etc. The more accessible the target audience the more likely an effective outcome and the higher the priority. This measure should take into account reach/frequency costs and cost per thousand data for media activities.

(Requires a knowledge of media and entertainment habits, and other lifestyle characteristics)

The fewer resources required to meet the needs of the target market, the greater the expected return on investment. A consideration of the financial, human and structural resources needed to service the segment. This refers to the extent to which interventions can be directed towards each segment with current services and facilities versus the need for additional resources.

(Requires an analysis of existing resources and a survey of consumer preferences)

The need to target specific disadvantaged segments. The inclusion of social justice considerations. Groups like aboriginal peoples, homeless, might constitute a small proportion of the population, but for equity reasons warrant special programs.

(Requires knowledge of policy as well as the practitioner’s own ethical considerations.)

To aid in the prioritization process, it is sometimes useful to develop a scoring grid and rate each criterion individually on a scale of 1 to 10. The higher end of the scale should always represent the best possible score (i.e. if very few resources are required to reach a segment then the score should be 9 or 10, not 0 or 1). The following is a sample TARPARE grid (arranged by score totals):

<table>
<thead>
<tr>
<th>SEGMENT</th>
<th>T</th>
<th>AR</th>
<th>P</th>
<th>A</th>
<th>R</th>
<th>E</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIG CITY INDEPENDENTS</td>
<td>9</td>
<td>8</td>
<td>6</td>
<td>8</td>
<td>7</td>
<td>10</td>
<td>48</td>
</tr>
<tr>
<td>PASSIVE LUDDITES</td>
<td>8</td>
<td>9</td>
<td>5</td>
<td>5</td>
<td>8</td>
<td>1</td>
<td>36</td>
</tr>
<tr>
<td>SMALL TOWN TRADITIONALISTS</td>
<td>7</td>
<td>10</td>
<td>4</td>
<td>3</td>
<td>9</td>
<td>2</td>
<td>35</td>
</tr>
</tbody>
</table>

The above sample grid reveals that “Big City Independents” should be the primary target audience in question.
Example 1

The primary target audience for “Eat well. Be active. Have Fun. You can prevent type 2 diabetes” campaign was women, with an emphasis on mother’s age 25 to 39 years, and women who had lower levels of education and income. Research showed that individuals with lower levels of education and income in their families had the lowest awareness of type 2 diabetes, lowest activity levels and the poorest eating habits.

Women were selected as the primary target as they were accessible and often made decisions that contributed to the health of their children, spouses (men, at higher risk) and parents (seniors, at higher risk), thus disseminating messages to all intended targets.

The secondary target was adult men aged 25 to 39 years. They tended to have lower awareness levels of diabetes and worse eating habits, but were found to be the least accessible target audience. Therefore, women were selected as the primary target audience.

Analysis of Target Audience

Analysis of the target audience helps social marketers understand:

- Current behaviour, knowledge, attitudes and values of target audiences.
- Barriers that discourage target audiences from adopting the desired behaviour.
- Knowledge gaps.
- The appeal of competing behaviours.

These can help to explain why the target audience is not already performing the desired behaviour.

Selecting the Target Market

The following piece from Dr. Gary Noble at the Centre for Social Marketing Research at the University of Wollongong in Australia called “Selecting the Target Market” is an excellent guide:

- **Segment Size** - How many people in the segment? Is it big enough to be worthwhile?
- **Prevalence of the ‘problem behaviour’** - How many people in this segment are engaged in the problem behaviour or ‘at risk’.
- **How easy is it to identify and reach the segment?** - What are the most efficient marketing communications tactics/channels that can be used to get the message across?
- **General Responsiveness** - How ready, willing and able is the segment to change NOW .... low-hanging fruit
- **Responsiveness to marketing mix** - Which segments are more likely to respond to a social marketing campaign ‘best’? What are the campaign costs for the different segments to achieve the desired results?
- **Resource Capabilities** - Do we have experience or understanding of some segments more than others and therefore more likely to have success with those segments?
- **Equity and Social Justice** - Where do you sit with certain disadvantaged groups (e.g. aboriginal groups, socio-economic groups, low literacy groups, etc.)?

Criteria can be grouped around the following four themes: greatest need, most ready for ‘action’, easiest to reach and respond, best ‘strategic fit’ with the organization.
Example 2

Health Canada created “Vitality” a campaign to promote healthy eating and physical activity. The target audience selected for “Vitality” was adults aged 25 to 44 years, with 9 to 13 years of education, as this group was at increased risk of developing cancer, heart disease and diabetes. In addition, within this population existing public awareness and prevention programs had not been successful in changing behaviour. Research showed that the target audience:

• Supported government efforts to provide information on healthy eating.
• Recognized healthy eating and physical activity improved health (however, obesity was a rising problem within the segment).
• Was interested in spending time with friends and children when not at work.
• Was not responsive to messages on weight loss. These programs had rarely been successful in creating long-term change and often left individuals feeling discouraged.
• Felt lack of time was a major obstacle to eating nutritiously and engaging in regular physical activity.
• Based on this research Health Canada initiated a program that integrated healthy eating, physical activity and positive body image. A positive message was used to motivate individuals to act on knowledge they already had.

The "Vitality" campaign worked to incorporate the values of the target audience, as well as showed moments of daily life when adults forgot about their concerns and spent time in the company of their children or friends.

12. How are you going to prioritize your target audiences (i.e. identify low-hanging fruit)? HINT: Assign a score from 1 to 10 for each TAR Pare criterion.

<table>
<thead>
<tr>
<th>SEGMENT</th>
<th>T</th>
<th>AR</th>
<th>P</th>
<th>A</th>
<th>R</th>
<th>E</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEGMENT 1</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SEGMENT 2</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SEGMENT 3</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>SEGMENT 4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SEGMENT 5</td>
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<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
Which group(s) should be the primary target audience(s)?

______________________________________________________________________________________

______________________________________________________________________________________

______________________________________________________________________________________

Which group(s) should be the secondary target audience(s)?

______________________________________________________________________________________

______________________________________________________________________________________

______________________________________________________________________________________

The following questions should be completed when you get back to the office. You may be able to find this information through secondary research that is available or you may have to conduct some primary research with the target audiences selected.

13. What do target audiences know about the desired behaviour?

______________________________________________________________________________________

______________________________________________________________________________________

______________________________________________________________________________________

14. What are the target audiences’ values and attitudes related to the desired behaviour?

______________________________________________________________________________________

______________________________________________________________________________________

______________________________________________________________________________________

______________________________________________________________________________________
SOCIAL NORMS AND COMPETING BEHAVIOURS AND BARRIERS

Social Norms

Social norms are people's beliefs about the attitudes and behaviors that are normal, acceptable, or even expected in a particular social context. In many situations, people's perception of these norms will greatly influence their behavior.

Therefore, when people misperceive the norms of their group — that is, when they inaccurately think an attitude or behavior is more (or less) common than is actually the case — they may choose to engage in behaviors that are in sync with those false norms. For example, many studies have shown that college students overestimate how much their peers drink. Experts have argued that this misperception of the norm drives greater alcohol consumption.

The social norm process works by collecting data on the actual versus perceived behavioural norms. If there is an over-exaggeration of the norms, then social marketing messages and tactics are developed to communicate the true norms that exist. By continuing to communicate the true norms, the myth that everybody is doing it slowly erodes until the group realizes that the majority is doing what’s right for “the environment”. When this positive message is sustained for a year or two, the negative behaviors of the group begin to shift downward to reflect the majority behavior. By providing accurate information concerning the prevalence of the behavior people will alter their behavior to fit the “norm”.

Competing Behaviours and Barriers

To be effective in the field of social marketing and influence behaviour change, marketers must understand what their target audiences perceive to be the barriers to change. Marketers focus on removing barriers to an activity while simultaneously enhancing the benefits. There is a tendency for individuals to respond positively to actions that are highly beneficial and have few barriers. Social marketers conduct research to discover the key barriers and potential benefits and then develop strategies and tactics that address them.

Identifying Competing Behaviours

The safer, healthier behavior you promote is competing with many other choices your target audience can make, including the risky behavior they may be performing now. To be effective, your strategy must make your proposed behavior at least as attractive as the alternatives.

A Focus on Benefits and Barriers

People do things because they get benefits in return. Barriers make it harder for people to act. Your research must uncover which benefits the target audience wants more, and which barriers they struggle with most. Your strategy depends on this.

Example

In Public Safety Canada’s “Is Your Family Prepared” campaign, the challenge to influencing Canadians to be prepared for emergencies included four main barriers:

- Psychological beliefs which deter vigilance and preparation;
- Lack of awareness among the public about where to go for security and emergency preparedness information;
- Reliance on government in emergency situations;
- Language barriers among Canadians who speak neither official language.
15. What are the social norms, competing behaviours and barriers to changing behaviour?

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

16. How can you help the target audience overcome barriers to behaviour change?

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

UPSTREAM SOCIAL MARKETING

It is unfair to expect your audience to change their behaviors easily, because actions they take are determined by many factors, both internal and external. Sometimes, even if motivated, the barriers are difficult to overcome, because some barriers are beyond the audience you are trying to influence control. In recent years social marketing has moved beyond the traditional focus on promoting individual behavior change to acknowledge that the environment where they live and work also partially constrains people’s choices. Upstream social marketing addresses how we change the policies, laws, regulations, and physical environments that can marginalize or render worthless our best efforts as social marketers at getting individuals to change their behavior if there are too many environmental barriers. Different to the downstream social marketing, which focuses on producing individual behavior change, upstream social marketing program is designed to change the macro-environment surrounding people’s lives to influence or change individual behavior or attitude. Therefore, the focus on the social marketing should move from downstream to upstream factors, which will make it easier to get results.

Example

Health Canada ran a campaign on second-hand smoke in the workplace. Health Canada had been delivering messages on the harms of tobacco use and second-hand smoke for many years, but the "Heather" campaign was aimed at a different target. The campaign featured Heather Crowe, a real Canadian who had been a waitress for 40 years. Heather never smoked, but worked in smoke-filled restaurants, and in the campaign materials she explained that she was dying from lung cancer due to second-hand smoke. Heather became a well-known spokesperson on second-hand smoke and toured the country speaking about second-hand smoke in the workplace. The campaign and the work Heather has done personally in communities across Canada has had a major impact on provinces and cities invoking bans on smoking in workplaces, restaurants and bars.

17. Would upstream efforts that work to change the environment be appropriate for this campaign?

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
OBJECTIVES

Types of Objectives

Overall the objectives of social marketing campaigns are to influence behaviour change for the benefit of individuals, organizations and/or society. However, other objectives such as knowledge and belief objectives may need to be achieved first to prepare the target audience for behaviour change.

- **Behaviour objectives** are simple clear and doable actions.
- **Knowledge objectives** are based on statistics or facts that could motivate the target audience. In particular, the target audience should know the benefits of the proposed behaviour and what tools they can access to help them with behaviour change.
- **Belief objectives** are tied to attitudes, opinions, feelings or values held by the target audience. For instance an individual may need to understand that their current behaviour is putting themselves, their families or society at risk before they are capable of performing the desired behaviour and that the behaviour will produce the desired results.

Example 1

In the Health Canada Fetal Alcohol Syndrome prevention campaign the following objectives were set:

- Behaviour objectives: Women who are or may be pregnant abstain from drinking alcohol.
- Knowledge objectives: Increase awareness that there is no safe amount of alcohol that can be consumed while pregnant and that any amount of alcohol has the potential to cause damage to the baby.
- Belief objectives: To instill the belief among women that drinking alcohol while pregnant is not worth the risk of damaging their child's health.

In setting objectives it is important to consider research conducted with the audience before a campaign. Research can help to identify the information most needed by the target audience, current attitudes and perceived barriers, thus indicating what objectives may lead to behaviour change.

If setting goals relative to behaviour change is not feasible at the time, alternative goals include: goals for campaign awareness and recall, levels of knowledge, acceptance of a belief, intent to change behaviour. When it is not possible to set measurable behaviour change objectives, it should be clear that campaign objectives lead to a long-term goal of behaviour change.
Example 2

In Public Safety Canada’s “Is Your Family Prepared” campaign, research conducted prior to the campaign indicated that the level of personal emergency preparedness among Canadians ranged from moderate to low. At the same time Canada’s national emergency response strategies required individuals to attend to their own needs for a minimum of 72 hours during a major disaster. And yet, only about one quarter of Canadians (28%) had sought information on what to do in case of an emergency; and only slightly more had prepared a family emergency plan (33%) or kit (32%).

Although Canadians are generally aware of a wide variety of potential disasters, only one in five intended to learn more about the types of emergencies that they might have to face and slightly fewer planned to create an emergency plan (15%) or put together a kit (18%). Further, a large number of those who haven’t prepared a kit don’t believe they need one, even though 61% of Canadians believed that preparing a kit is an important part of safety. The following outcomes were set for the campaign.

- Behavior objectives: Seek to increase a percentage of the target audience who obtain information about emergencies, complete an emergency plan, and assemble or purchase an emergency kit.
- Knowledge objectives: Focus on increasing a percentage of the target audience who know more about emergency situations and how to respond.
- Belief objectives: Focus on decreasing a percentage of the target group who believe that there are many emergencies that you simply can’t prepare for. In addition, the campaign was designed to increase the number of Canadians who believe there is a sense of urgency about getting prepared and that preparedness is necessary for their own and their family’s safety. Time and money are not significant barriers to becoming prepared. The lowest income group (under $30,000) is just as willing to pay $60 for an emergency kit as those with incomes $100,000 and over.

Every social marketing plan should include measurable objectives upon which it can be evaluated. These objectives should be SMART:

- Specific
- Measurable
- Achievable
- Relevant
- Time-based

These objectives should be stated in terms of behaviour change and other measures (e.g. awareness, campaign recall/response, changes in knowledge, belief/behavioural intent). These objectives should be long-term goals set for two to three years from the start of the campaign. It often takes a several years for measurable behaviour change to occur. A change of 2% to 5% over a few years is a significant and positive level of change when dealing with health and social behaviours.

Example 3

Health Canada’s Fetal Alcohol Syndrome /Fetal Alcohol Effects prevention campaign set the outcome “To increase the percentage of women who believe that consuming even small amounts of alcohol during pregnancy can harm the baby, from 52% to 57% in one year.”
18. Knowledge objectives: What do the target audience(s) need to know in order to act?

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

19. Belief objectives: What do the target audience(s) need to believe in order to act?

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

20. Behaviour objectives: What specific behaviour do you want to influence your target audience to change as a result of the campaign?

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

The following question should be completed when you get back to the office.

21. What are specific measurable objectives upon which you can evaluate a campaign's success?

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
SOCIAL MARKETING RESEARCH

Market research involves two types of data:

- **Primary information**: This is research you compile yourself or hire someone to gather for you.
- **Secondary information**: This type of research is already compiled and organized for you. Examples of secondary information include reports and studies by government agencies. Most of the research you gather will most likely be secondary.

What types of research are used in social marketing? *

**Exploratory Research**: Used to collect preliminary information in the problem definition stage and usually is initiated at the beginning of the marketing planning process in order to determine purpose and focus.

**Formative Research**: Used to assist in developing your social marketing strategy (i.e. to get a better handle on target markets and can be done quantitative, qualitative or using secondary research).

**Pre-test Research**: Used to evaluate alternative strategies and tactics to ensure strategies and executions have no major deficiencies. Pre-test research also helps in fine tuning possible approaches, mostly qualitative (e.g. focus groups).

**Monitoring or Tracking Research**: Provides ongoing measurement and may be used to establish baseline subsequent benchmarks relative to objectives.

**Evaluation Research**: This type of research is the final assessment of a campaign or program used to measure and report short-term campaign outcomes and long-term campaign impacts on issues being addressed (e.g. campaign outputs).

* By Philip Kotler, Nancy R.Lee pp.73-75

Marketing Research Brief

Research is a key element for every component of the social marketing process. In many instances it is usually contracted out to a marketing research company. However in some cases the research is done internally. In any case, to get the information you want from the research you are conducting it is critical that you prepare a Marketing Research Brief.

Writing a Marketing Research Brief is an essential first step in any market research exercise. It will help those doing the research develop a relevant and appropriate research study. The very act of writing a brief enables the social marketer to prioritize the objectives and planned outcomes of the research. The more time spent planning the research, the better the outcomes may be.

Ultimately, preparing a Marketing Research Brief helps you clarify your objectives and prioritize what you want from the research. The brief helps the researcher come up with the most appropriate research solution, and to give you the best “bang” for your research budget.

The starting point of any good brief is always the social marketing objectives. Collaborating with relevant organizations and/or partners involved in the campaign at the outset will save time by ensuring all key objectives are included in the brief. The more focused the objectives, the more focused the result! An overview of the key relevant issues to the project and details of recent studies provide valuable background information. Indeed, one of the most useful pieces of background information is accurate information on the size and structure of the target audience.

Social marketing objectives should be summarized separately from research objectives.

You may have a preferred methodology, or if you are working with a contractor it is important that they provide you with several alternative options costed in their proposal (for example, alternative options of conducting focus groups and in-depth interviews).
The time required to conduct research is largely driven by the scale of the exercise (e.g. number of interviews) and type of data collection (e.g. face-to-face interviews will take longer than online surveys). Hard-to-reach audiences will have a much greater impact on the length of time required to conduct interviews. If the research needs to be conducted within a limited time frame, or if there is a key reporting date to be met, including this information upfront will have a significant impact on the type and scale of research methodology. Interim results can always be presented against a series of key milestones.

Marketing Research Brief Guide

Always start the process with a review of secondary research. During this process information gaps will undoubtedly be uncovered or identified. It is helpful to have an overall research and evaluation plan. This is usually developed as one part of your overall social marketing strategy. You will need to decide if you need to start off with quantitative or qualitative research to find out what might motivate your audience to change their behaviour.

Your brief provides a context for the researcher. They need to know where the research fits within your overall social marketing strategy. It is really helpful for the researcher to know why you wish to undertake the research and how it will be used. If previous research has been undertaken provide information about what has been completed to date. If there are any particular political imperatives it may be helpful to let the researcher know as well.

A great Marketing Research Brief possesses clarity, displays depth of thought, and most importantly, provides direction.

The following headings are the areas you should cover in your brief.

**Background:** (Short overview of the social marketing campaign and how the research you will be conducting will support the campaign)

______________________________

**Social marketing objectives:** Outline here the overall objectives of your social marketing strategy (i.e. what you wish to achieve with your target group(s)). Include knowledge, belief and behaviour objectives.

______________________________

**Research objectives:** Specify exactly what it is that you want to achieve from this research. Try to be as specific as you can.

______________________________

**Research audience:** You should have a general idea of whom you are trying to reach (i.e. who are your target segments). You should outline what target group or groups you want to find out more about. Be as specific as you can. Indicate your priorities in case there is not enough budget to cover all groups.

You can define your target group(s) demographically, geographically or attitudinally (psychographics).
Information on target audiences: It is important that you let the researcher know of any information about your target group that you already have available. It may be from previous research that you have commissioned or from another source or it may come from the analysis of secondary research analysis you conducted. This will help the researcher identify the information gaps.

Checklist of key discoveries you are hoping to find out from the research. Please check the appropriate boxes below.

Check off those that are relevant to your study:

☐ To better understand current behaviour, knowledge, attitudes, perceptions and values of target audiences.
☐ Knowledge gaps (i.e. facts that could motivate the target audience to change attitudes and behaviour). For example, benefits of the proposed behaviour and what tools they can access to help them with behaviour change.
☐ Better understanding of competing barriers and benefits? For example, barriers that discourage target audiences from adopting the desired behaviour and how you can help the target audience overcome barriers to behaviour change.
☐ Which target segment(s) is most ready, willing and able to change their behaviour? For example, which segments are more likely to respond to a social marketing campaign “best”? (Low-hanging fruit)
☐ What the target audience believes are the most efficient marketing communications tactics/channels that can be used to get the social marketing message across to them.
☐ Place (i.e. where and when the target market perform the desired behaviour).
☐ Pricing issues particularly non-monetary costs:
  ☐ Time
  ☐ Psychological risks
  ☐ Physical discomfort
  ☐ Loss of pleasures
  ☐ Other
Working with Research Contractors

Research methodology
The researcher would usually make a recommendation on what methodology is most appropriate to meet your marketing research needs. However you may already have an idea of the sort of information you are after (e.g. qualitative rather than quantitative). If so let them know. Remember also to ask the researcher to provide the rationale for their recommended methodology.

Timelines, milestones and deliverables
Outline critical deadlines that you expect the researcher to meet. Deadlines might include: research proposal received, draft questionnaire completed, field work begun and/or completed, top-line results reported, final report received and presented. Be realistic. You are more likely to get good work if you have reasonable expectations in terms of timing. Along with your timings be specific about your milestones. Some people are happy just to leave the researcher alone until they have a final report to deliver; others prefer to be part of (and approve) every step of the process. Making this clear from the outset will ensure a productive relationship.

Be clear about deliverables. Do you want the researcher to do a verbal presentation of the research report? How many copies of key documents do you want? Do you want them to include all the tables in the report or just summarize the key results? Do you need an easy-to-read version of the final report to put on your website?

Budget
It is helpful to let the researcher know what kind of budget you have available as this affects what sort of research design is feasible.

Marketing research selection criteria
If your research is going to be contracted out to more than one company (i.e. it is a competitive bidding situation) it is good form to give everyone an idea of when and how you want their proposal to be presented, what criteria their proposals will be judged on, and when the decision will be made.
MARKETING STRATEGY DEVELOPMENT

All marketers must understand the marketing mix or the 4P’s of marketing (Product, Place, Price and Promotion) when developing a campaign. Social marketing is no different. Social marketers must be aware of each of these factors and how they will affect the target audience. The exchange theory is fundamental (i.e. the consumer must perceive benefits that equal or exceed the perceived costs).

Product

As in commercial marketing, the social marketing product is what is being promoted to the target audience. In social marketing there are three types of products:

**Actual product:** The specific behaviour that is being promoted (e.g. don’t drink and drive, immunize children at appropriate times, conserve electricity, become an organ donor, wear a life vest, etc.).

**Augmented product:** The tangible objects and services offered to support behaviour change (e.g. wallet size immunization card, organ donation card, life vests available for loan, breathalyzers at bars).

**Core product:** The benefits the target audience will experience when they perform the behaviour (i.e. desired audience benefits promised in exchange for performing the targeted behaviour). For example, what’s in it for the customer to buy your product? What benefits will they receive? What needs will the desired behaviour satisfy? What problems will it solve?

Example:

The augmented product for Health Canada’s Smoking Cessation Campaign would include the “Go Smoke Free” website and the “On the Road to Quitting” step-by-step guide. The actual product is the behaviour of quitting smoking. The core products are the health, financial and social benefits received after the individual quits smoking.
22. What is the behaviour that you are promoting? (Actual Product)
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

23. What tangible products and services will be offered to support those who want to change their behaviour? (Augmented Product)
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

24. What are the benefits to the target audience of adopting the behaviour? (Core Products)
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

Positioning

In social marketing products are hard to promote because of their high "price". Products like behaviors and attitudes require long-term commitments and do not sell as easily as a bar of soap or a car. The cost of a social marketing product often includes: a person's time and effort, giving up things he likes, embarrassment or inconvenience, or social disapproval. To counteract factors working against adoption of the product we need to acknowledge these potential problems and address them.

Your product positioning determines how the people in your target audience think about your product as compared to the competition. Just as various cigarette brands bill themselves as the freshest, the most fun, the most athletic, the least expensive, the classiest, or the most feminine, etc. your product needs to be positioned in relation to the alternatives.

Product positioning is usually based on either the benefits of the product or removal of barriers. By talking about your product with the target audience, you can learn the benefits they value most and the barriers they foresee. Decisions regarding the core, actual and augmented product will determine positioning. In social marketing product positioning includes the perceptions, impressions and feelings that consumers have for the product.

2 http://www.social-marketing.com/building.html
It is important to make choices that are based on a clear understanding of your competition. Know the needs, wants and preferences that your target market associates with their current behaviour (i.e. your competitor).

Make choices that ensure that your target audience will see your product as offering more and greater benefits than the one they associate with their current behaviour. The product’s positioning should be thought of as the way the product is defined by consumers on important attributes, or rather the place the product occupies in the consumers’ minds relative to competing products.

One way to develop a positioning statement is to fill in the blanks to the phrase:

25. “I want my target audience to see______________________________________________________
(desired behaviour) as _________________________________________________________________
(a phrase describing positive benefits of adopting the behaviour) and as more important and
beneficial than _______________________________________________________________________
the competing behavior (play the devil’s advocate here)”.

Example

“I want my target audience to see breastfeeding as loving and healthy and as more important
than concerns with nursing in public”; or “I want my target audience to see moderate physical
activity as easy and something they can fit into their everyday lives and more important than
sleeping in”.

Price

The price of a social marketing product is the cost (monetary or non-monetary) that individuals associate
with adopting the new behaviour. These include the cost of giving up the old behaviour and the cost of
taking up a new behaviour.

Example 1

Consider a tobacco smoking cessation campaign. The price of the product “quitting smoking”
could include:

- The cost of medication or other quit smoking aids
- The discomfort of withdrawal symptoms and cravings
- The feeling of no longer belonging in certain social groups.

The marketer’s task is to ensure that the benefit - what is offered to the target audience - is equal to or
greater than the costs - what they will have to give up. Monetary costs are the prices charged for tangible
objects and services that accompany the campaign.
Monetary Cost examples include:

- Bike helmets, life vests, emergency prepared kits, blood pressure monitoring equipment, sunscreen, condoms, birth control pills, garbage compost containers, recycled paper, energy saving light bulbs, & appliances. Fees for family planning services, swimming classes, parenting classes, smoking cessation products, classes. Fitness club, taxi rides.

Non-monetary costs are typically related to:
  - Time
  - Psychological risks
  - Physical discomfort
  - Loss of pleasures

Example 2

Time, effort and energy involved in behaviours:
- Sorting garbage, pulling over to use the phone, cooking a balanced meal, getting rid of weeds by hand, putting together an emergency preparedness kit, reusing grocery bags, using mass transit instead of automobile.

Psychological risks and losses associated with behaviours:
- Letting a lawn go brown in summer, coffee or alcohol beverage without a cigarette, telling a loved one that he drinks, eats too much, using sunscreen and coming back from the “South” pale, talking to your children about drugs.

Physical discomfort or loss of pleasures from activities:
- Having a mammogram, wearing a life visit, doing exercise when you are “out of shape”, craving a drink or a cigarette, rejecting dessert when on a diet.

Some incentives will come naturally with behaviour change and in other cases the social marketing campaign can build in rewards or recognition as incentives.

Example 3

**Monetary Incentive:** When an individual quits smoking they will save money because they no longer need to buy cigarettes.

**Non-monetary Incentives:** When dealing with youth issues Health Canada has run contests to engage youth and provide them with recognition for their positive choices. Health Canada’s “Challenge to Youth” anti-tobacco campaign included a contest that invited teenagers from across Canada to “give us your best take on smoking” through displays in theatres and in retail stores. Ten winners were selected to give their message in a professionally produced commercial.
26. What is the price to the target audience of adopting the behaviour you are promoting? (Non-Monetary Cost)
   - Time
   - Psychological risks
   - Physical discomfort
   - Loss of pleasures

27. What will be the price of tangible products or services associated with the campaign? (Monetary Cost, i.e. prices charged for tangible objects and services)

28. Will monetary and/or non-monetary incentives be offered? (Monetary Incentive, i.e. rewards or recognition as incentives)
Place/Channel/Distribution

Place is where and when the target market will perform the desired behaviour and access products and services. The outcome of the social marketer is to make it as easy as possible for the target audience to get the tools they need to make behaviour changes.

To determine where to deliver your product think about where the target audiences make decisions about the desired behaviour, or where you could encourage the target audience to perform the behaviour. When tangible objects and services are included a network of intermediaries may be established to reach target groups.

The outcome of the place strategy is to make it more convenient and as pleasant as possible for the target group, which may involve in making locations closer and more appealing, extending hours and making performing the desired behaviour more convenient than the competing behaviour.

Example 1

The Aboriginal Diabetes Initiative by Health Canada encouraged Aboriginal individuals to learn more about risk factors for diabetes and take positive steps to prevent the condition, particularly among children. Campaign material was delivered through National Aboriginal Organizations who were viewed as credible to the target audience and through retailers serving Aboriginal populations (North West stores and Arctic Co-ops). Retail network alliances allowed for information to be delivered at the point of purchase, where individuals can think about how to make better consumer choices. Additionally, materials were delivered directly to children through school networks.

Example 2

In Public Safety Canada’s (PSC) “Is Your Family Prepared” campaign Canadians were asked to list ‘trusted sources of information’ on preparing for emergencies. The list was used to guide decisions regarding distribution channels and included fire and police departments, nonprofit organizations, friends/neighbours, municipal government, provincial government, news media, and the federal government.

PSC expanded its distribution channels for the emergency preparedness guides and added credibility to its messaging by partnering with trusted organizations and associations such as provincial and territorial emergency management organizations such as Canadian Red Cross, St. John Ambulance and the Salvation Army, Canadian Association of Fire Chiefs, Canadian Association of Chiefs of Police, and the private sector.

Pre-packaged kits and campaign promotional materials were distributed to retail partners including hardware stores, grocery stores, department stores and pharmacies. A total of 25 chains (4,000 stores) participated. A kit checklist and a list of retailers participating in the project are available from the getprepared.ca website, and callers to the 1-800 service were told which retailers in their province carried the kits.
The following are the channels for a campaign targeted at seniors, youth, new citizens and immigrants.

<table>
<thead>
<tr>
<th>TARGET AUDIENCE(S)</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SENIORS (AGE: 65+)</td>
<td>Snowbirds association</td>
</tr>
<tr>
<td></td>
<td>Old-age homes</td>
</tr>
<tr>
<td></td>
<td>Senior organizations</td>
</tr>
<tr>
<td></td>
<td>Senior communities</td>
</tr>
<tr>
<td></td>
<td>Fairs and festivals</td>
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<td></td>
<td>Golf, fishing, sailing clubs</td>
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<td></td>
<td>Service clubs</td>
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<td></td>
<td>Key stakeholders (banks and other financial institutions)</td>
</tr>
<tr>
<td></td>
<td>Post offices</td>
</tr>
<tr>
<td>YOUTH (AGE 16-24)</td>
<td>High-schools/Universities/Colleges</td>
</tr>
<tr>
<td></td>
<td>Workplaces</td>
</tr>
<tr>
<td></td>
<td>Movie theatres</td>
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<tr>
<td></td>
<td>Sports arenas</td>
</tr>
<tr>
<td></td>
<td>Youth organizations</td>
</tr>
<tr>
<td></td>
<td>Online (Facebook, YouTube)</td>
</tr>
<tr>
<td></td>
<td>Fast-food restaurants</td>
</tr>
<tr>
<td></td>
<td>Community centres</td>
</tr>
<tr>
<td></td>
<td>Online games (in-game product placement)</td>
</tr>
<tr>
<td></td>
<td>Retail outlets (music, sports, etc.)</td>
</tr>
<tr>
<td>NEW CITIZENS AND IMMIGRANTS</td>
<td>Community centres (ethnic) in major markets</td>
</tr>
<tr>
<td></td>
<td>Citizen and immigration offices</td>
</tr>
<tr>
<td></td>
<td>Post offices</td>
</tr>
<tr>
<td></td>
<td>Universities/Colleges</td>
</tr>
<tr>
<td></td>
<td>Embassies/Consulates</td>
</tr>
</tbody>
</table>

29. Where and when would the target audience make decisions about adopting the desired behaviour?
30. What distribution channels are best for reaching the target audience?

Promotion

Promotion is a persuasive communication tool that ensures that a target knows about an offer, believes they will experience the stated benefits and is inspired to act. Promotion has two components: the messages and the tactics used to deliver the messages. Strategic alliances can significantly enhance the reach of a campaign.

Messaging

Key messages are not necessarily slogans or taglines but brief statements highlighting the bottom-line message related to a campaign. To specify the desired action required (call to action) is also important.

Example 1

The key messages for Health Canada’s Eat right. Be active. Have fun. You can prevent type 2 diabetes campaign is as follows:

- Type 2 diabetes is preventable through modifiable behaviour such as healthy eating and regular physical activity.
- Parents can help improve their children's lifestyles now and for the future by encouraging active, healthy living.
- If you do not engage in healthy living practices now you will be at a higher risk of developing diabetes and its complications.
- There are many serious complications of diabetes (cardiovascular disease, blindness, limb amputation, etc.).

Once key messages are decided you can think about the approach you will use to frame them in a meaningful way. The key messages must be presented in a way that is relevant to the target audience(s) and are clear and memorable. This includes using linguistic elements and visual and auditory cues that work together to form a tone and style for a campaign.
Example 2

Health Canada created ads delivering messages to Aboriginal populations about second-hand smoke. TV and printed advertisements and fulfillment materials created for this campaign showed tobacco warning labels that appear on cigarette packages on the bodies of Aboriginal individuals instead and asked the audience to think about the harm second-hand smoke can cause to others. The advertisements used culturally-appropriate images and music. Pre-testing showed that Aboriginal populations were receptive to the approach of the campaign and that they understood that the messages were specifically targeted to their group.

Primary Key Messages by Audience

In some cases you may decide to segment the messages by:

- Primary and secondary target groups
- External stakeholders
- Internal stakeholders

It is important that the approaches for messaging are pre-tested to ensure that they meet the needs of the audience and to guard against unforeseen negative reactions. In addition, they need to be assessed for their ability to deliver on the strategies and objectives developed in the creative brief.

31. What key message(s) do you want your campaign to communicate? (Note: make sure there is a call to action)

Primary Target Group(s)

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

External Stakeholders (e.g., volunteer organizations, government, private sector, academic, intermediaries, etc.)

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________

Internal Stakeholders (e.g. employees, management, board of directors, etc.)

______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
______________________________________________________________________________________
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Tactics

Tactics are the methods used to deliver a message. Strategies should use a combination of social marketing targeted tactics directed to key target groups. It is more effective to reach target audiences with messages that are relevant and will resonate with them.

Social Marketing Tactics:

- Advertising
- Public service announcements
- Proactive public relations *
- Promotional and collateral material
- Web and digital/social media marketing *
- Direct marketing
- Face to face marketing *
- Publications/posters/ other print materials
- Educational products
- Strategic alliances and partnerships*

* See section on low-cost promotional tactics for social marketing campaigns.

To achieve success in social marketing, it is important to engage a mix of promotional tactics and strategies.

Example

The "Break Free" campaign, which worked to reduce smoking among youth aged 12 to 17 years, applied a wide variety of tactics to reach the youth audience. TV, radio, bus and transit shelter posters, magazine ads, targeted publications, special promotions and activities, such as poster and lyric-writing contests were all incorporated into the campaign. The campaign featured popular entertainers (singer Luba and Candi) and famous athletes as role models for young people.

Health Canada worked with the most popular Canadian youth show, "Degrassi High", to reach youth with messages on several health issues. Health Canada and Degrassi developed a series of six 30-minute programs called "Degrassi Talks". The actors in the Degrassi High show discussed sex, alcohol, abuse, depression, drugs and sexuality with audience members on the show. This was the first opportunity for Health Canada to work directly with TV producers to deliver relevant messages to key target groups.
Note: If you are looking for community-based social marketing, tools or case studies, the Tools of Change website [http://www.toolsofchange.com/firstsplit.asp](http://www.toolsofchange.com/firstsplit.asp) will help you integrate best practices into your programs - practices that have already been successful in changing people's behaviour.
LOW-COST PROMOTIONAL TACTICS FOR SOCIAL MARKETING CAMPAIGNS

There is a misconception in the social marketing world that you need a lot of money to develop a comprehensive social marketing campaign. There are two reasons for this misconception. First, organizations, particularly governments, believe they have to spend a significant amount of money on paid media (advertising) to run a successful social marketing campaign. Second, those organizations usually non-profits that don’t have a lot of money feel if they don’t have significant funds it is hopeless to become engaged in social marketing and tend to run ineffective “public education” initiatives which tend to focus on awareness but not much else. Certainly not behaviour change!

The Centre of Excellence for Public Sector Marketing proposes four (4) social marketing tactics that are low-cost, but can have significant impact on changing attitudes and behaviours (i.e. “make the sale”).

These four strategic tactics will involve a time commitment to develop, but will produce long-term effective results. Low-cost marketing ideas are only limited by your imagination. Start brainstorming creative ways using these four promotional tactics to launch your social marketing campaign.

Strategic Alliances and Partnerships

When developing your tactical plans it is a good idea to consider how you can expand the reach of your messages through strategic alliances and partnerships. You may wish to identify specific organizations or simply the types of organizations with whom you will develop alliances.

Partnerships between governments, nonprofits and private sector organizations for the purpose of delivering information to citizens are becoming increasingly popular in Canada and around the world. Strategic alliances are gaining recognition by all sectors whether they are public, private or nonprofit as a legitimate and effective way of reaching and influencing individuals.

Clearly, partnerships need to be considered as an integral tool for delivering cost-effective messages to the audience(s) identified for a social marketing campaign. It is strongly believed that both the tangible (e.g. communications and distribution networks) and intangible (e.g. credibility, associative) value of partnerships could be substantial and these partnerships should be leveraged to deliver targeted, positive and sustained messages to your audiences.

An expanded communications network composed of private sector, government, NGOs, interest groups, coalitions, professional associations, academia and opinion leaders will improve credibility tremendously over a single-source marketing campaign. They will also help effectively saturate the media while spreading the cost across all sectors.

Strategic alliances require common and compatible objectives and they should be used to assist an organization do something it cannot do on its own. Strategic alliances can be risky and developing them can be time consuming so only enter into a strategic alliance when the benefit to your organization is clear.

The primary value of working with these partners towards an integrated approach is that they have the ability to move beyond a public education role to one where they can offer viable solutions at the appropriate time that moves the target audiences closer to action.

In addition, while your organization may be a trusted source of information, the target audience may likely respond more positively to information and endorsements from credible third parties as a means of providing balance to your initiative. This is particularly important for those who may be generally more skeptical of, and less responsive to, messages from your organization (for example, youth may be skeptical from messages that emanate from a government organization).
The following are some of the benefits of using strategic alliances and partnerships:

- **Financial**: Co-investment to leverage or expand the resources available to achieve goals. When collaborating organizations contribute skills, time, money and other in-kind resources to initiatives, the overall impact of the campaign may be greater than if you were working alone.

- **Credibility and enhanced influence**: Partnering with organizations that are viewed positively by the target audience can improve the effectiveness and impact of messages.

- **Strengthened relationships** with, and support from businesses, nonprofits, media and other government organizations.

- **Access to new networks and distribution channels** that may expand the reach and impact of an initiative and reach the target market on their own terms.

- **Access to new sources** of information and expertise.

**Types of Strategic Alliances**

Strategic Alliances can take on many roles and formats, depending on the objective of the campaign. The following are examples of types of strategic alliances that may be used in a campaign.

- **Advocacy**: Influencing companies, industries and government to change products or policies to facilitate social change.

- **Consultative or Advisory**: Provide advice and input on policies, strategies, program design and implementation.

- **Contributory**: Provide financial support (if you have a funding program you may want to use it to leverage support for your social marketing campaign.)

- **Operational**: Work to deliver information and services and build capacity.

- **Collaborative**: Share authority, resources, costs and benefits.

- **Catalyst/Broker**: Initiate new relationships by bringing together key stakeholders.

**Example 1**

Health Canada worked with several organizations in delivering messages on Sudden Infant Death Syndrome (SIDS). Partnerships were designed to reach individuals in their community through health professionals and as they cared for their children.

Strategic alliances were developed with the following nonprofit organizations for the distribution of a SIDS information kit:

- Canadian Foundation for the Study of Infant Deaths
- Canadian Institute for Child Health
- Canadian Pediatric Society

The Foundation for the Study of Infant Deaths also operated a 1-800 information line. Health Canada put the number on materials providing a source for more information.

A partnership with a private sector organization was also a component of this campaign. Pampers Canada helped communicate the SIDS message to care givers and parents by including the “Back to Sleep” message on the waistband of all newborn and size 1 diapers and distributing the “Back to Sleep” brochure in their prenatal and hospital pack to over 500,000 parents.
Example 2

Public Safety Canada expanded its distribution channels for the emergency preparedness guides and added credibility to its messaging by partnering with trusted organizations/associations such as provincial/territorial emergency management organizations such as Canada Red Cross, St. John Ambulance and Salvation Army, Canadian Association of Fire Chiefs, Canadian Association of Chiefs of Police and the private sector.

Pre-packaged kits and campaign promotional material were distributed to retail partners including hardware stores, grocery stores, department stores and pharmacies. A total of 25 chains (4,000 stores) participated. A kit checklist and a list of retailers participating in the project are available from the getprepared.ca website, and callers to the 1-800 service were told which retailers in their province carried the kits.

Example 3

Provincial transportation ministry who is promoting purchase of fuel-efficient motor vehicles may engage in the following strategies.

- Government Ministries and Agencies (e.g. Environment) that are communicating complementary messages to a similar target audience. Also other levels of government (e.g. municipalities, federal departments such as Natural Resources Canada, Environment Canada).
- Nonprofits and associations focused on environmental issues and communicating with members of the vehicle fuel efficiency target audience.
- Private and public organizations that are communicating with motorists on a regular basis (e.g. CAA, driver training companies and organizations, etc.).
- Industry stakeholders that can influence purchasing decisions by the products and services they sell (e.g. auto manufacturers, auto dealerships, service centres); also retailers who sell auto parts and do repairs (e.g. Canadian Tire).
- Industry suppliers that benefit from a cleaner environment (e.g. insurance companies).
- Media organizations and publications/websites that are dedicated to the environment and/or have access to the target audience (e.g. Canadian Home and Garden).

32. Which are the most promising organizations with which to develop strategic alliances?

Private sector

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

Centre of Excellence for Public Sector Marketing
www.cepsm.ca
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Nonprofit/volunteer organizations/associations/universities

______________________________________________________________________________________

______________________________________________________________________________________

______________________________________________________________________________________

Government and other public sector organizations

______________________________________________________________________________________

______________________________________________________________________________________

Face-to-Face Marketing

There is a myth that face-to-face marketing is retiring and we are moving on to bigger and better things. Face-to-face marketing includes everything from live events, seminars, workshops, outdoor events, trade shows and conferences. The younger group, known as generation Y, or those born between the 80’s and early 90’s, highly depend on technology for work and personal relationships. The rise in people’s need for technology to function has led others to believe that meeting with clients for face-to-face marketing is not necessary anymore and has become a “fossilized tactic”. So what is the point in wasting money to meet with people face-to-face if it is an outdated tactic?

The point is that meeting face-to-face is absolutely effective and vital to building strong relationships with clients, or anyone for that matter. People who are wrapped up in the virtual world still have a strong desire for personal relationships, which is what they sometimes try to falsely attain through technology. Whether it is a work-related relationship or a personal relationship, each needs that face-to-face connection. By using technology you may lose that relationship. People have bought into this myth that face-to-face interaction is no longer important and have begun adapting to technological alternatives. But face-to-face marketing has and always will be effective; it is a strategy that best fits an organization that is working with a limited budget and needs to influence key stakeholders and opinion-makers.

While most people think of public relations as media relations, there are times when either you can’t reach your audience through print, broadcast or the Internet, or you need to supplement your media program. That’s when you need to think about face-to-face marketing - placing clients directly in front of targeted audiences through informational events structured around their interests.

Whatever the rationale behind a face-to-face marketing effort, one of the underlying benefits is that the event itself is as much a part of the message as the content. There are times when technology just doesn’t do the job and face-to-face marketing is required.

What can face-to-face marketing offer a social marketer?

- It provides you the opportunity to meet with key stakeholders or targeted populations.
- It is most appropriate when some form of personal intervention or interaction is required to deliver detailed information, address barriers and concerns, build trust and gain commitment.
- Excellent way to compile data and build a database.
- Provides fast and flexible solutions in a changing environment.

Face-to-face marketing can begin a lasting relationship between the target audience(s)/key stakeholders and an organization using the simplest and oldest method of communication - one person speaking to another. Events and exhibits and educational tactics like workshops, seminars, should be considered as part of the face-to-face strategy.

3 http://ezinearticles.com/?Social-Media-Vs-Face-to-Face-Marketing---The-Death-of-Real-World-Networking?&id=3772456
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It can take place in a very wide range of locations:
- Airports
- Railway/ bus/subway stations
- Ferry ports
- Supermarkets
- Special national and local events
- Shopping malls and community centres
- Trade shows
- Conferences (government, private sector and nonprofit)

It is essential that staff involved must be well trained in approaching stakeholders or specific target audiences (e.g., youth, seniors, women, aboriginal groups, new Canadians, etc.). They must also be able to offer a fast but clear summary (problem, solution) of why they are making the approach - from an excellent knowledge of the program, issue, product or service and also be absolutely clear about what is expected of them in terms of delivering your social marketing message. Personality, politeness, body language, negotiating skills, objection handling and administrative competency are just some of the skills that are required by a successful face-to-face marketer.

So what does it take to make face-to-face marketing work?

1. **The plan**—have a well-defined plan of what you want to do, what you want target audiences to get from their experience, and how you will deliver. A good plan underpins everything.

2. **Pick the right opportunities**—the right show or event will make all the difference. Start by asking your current stakeholders what shows or events they go to and why.

3. **Have a great presence**—the right exhibit booth and graphics help prospects understand who you are, what you do and why they should care. A great presence also includes having the right people work the event.

4. **Follow up and evaluate**—manage and measure your results. A good Client Relationship Management (CRM) system is essential. A plan for fast follow-up on inquiries is vital.

5. **Have a good partner**—a good plan poorly executed is no plan at all. Find a good partner that can help with all the thousand little details that face-to-face marketing presents.

Source: [http://www.ipmarketingadvisor.com/content/2010/03/02/face-to-face-marketing-matters-more-than-ever/](http://www.ipmarketingadvisor.com/content/2010/03/02/face-to-face-marketing-matters-more-than-ever/)

33. **Which are the most promising face-to-face activities/venues for your social marketing initiative?**

- Airports and ferry ports, railway/ bus/subway stations
- Supermarkets
- Shopping malls and community centres
- Special national and local events
- Trade shows
- Conferences/seminars/workshops
- Other

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**Proactive Public Relations**

A proactive public relations (PR) approach to marketing communications is a key tactic for social marketing. PR is not that thing that you should be doing but never quite get around to. You need to be proactive. PR is a vital marketing communications tactic that can help you get significant communications weight for a social marketing campaign without spending significant funds.
Proactive PR provides free visibility for your social marketing campaign. Successful PR activities generate positive mentions of your programs and activities in the media and are very cheap to implement. You can set up a blog and Twitter account for free and it costs you nothing to send a press release (try a social media press release [http://smr.newswire.ca/en](http://smr.newswire.ca/en)). It is impossible to get free advertising. Advertising via traditional mediums can be quite expensive, but proactive PR is very low-cost and effective. Countless studies have shown that the results of a PR campaign are considered much more trustworthy than ads. Most PR strategies are designed to be easily tracked and measured. If you put an ad in a newspaper you may find it hard to work out whether it has been successful. It may be hard to measure your success. However, if you use PR you should be able to easily work out whether your strategies have been successful.

Public relations are vital to the success of a public sector or nonprofit organization social marketing campaign. No matter how important your cause is you should not expect that everybody will know about it (or even about your organization). Proactive PR is essential to success. From building awareness and credibility to supporting your campaign, a well-executed proactive PR program can make the difference in achieving your social marketing objectives.

The following tips and tactics will illustrate how easy it is to launch your public relations—no matter how large or small your organization.

### Tips and Tactics to Get Started

The ultimate goal of most proactive public relations programs is to generate positive media coverage in the media, including online media that are read, listened to or viewed by your target audience(s). Whether the media coverage you seek marks the beginning of a campaign to influence the public on a particular issue, or is simply the basis for increasing knowledge of your organization, there's a good deal of advance preparation that needs to take place before you start.

There are five important tactics that your organization can use to generate desired media coverage whether you have a dedicated PR person or not:

- Framing the story and writing a news release
- Targeting and connecting with the appropriate media
- Distributing your news
- Developing experts and promoting them as a reliable source
- Monitoring and measuring the effectiveness of your efforts

#### Framing Your Story and Writing Your News Release

News releases, especially social media releases ([http://smr.newswire.ca/en](http://smr.newswire.ca/en)), are a great way for organizations to build awareness about a cause or issue. A news release should be written in a journalistic, rather than marketing, style. It should be objectively written as though a reporter were writing the story for you. Most importantly, your release needs to "inform" people, NOT just "sell" them something. It should include a headline that grabs the reader’s attention and speaks directly to the "news"; a lead paragraph that contains the information most relevant to your message, such as the five W's (who, what, when, where, why) and a short boilerplate description of your organization and or program. The release should always list a contact that can be reached at any time in case a reporter has follow up questions.

#### Targeting, Influencing and Reaching Appropriate Media

Knowing where members of your target audience get their information that drives their decisions is one of the most important aspects of a PR program. Once you have this information, determine which reporters cover news related to your organization or causes. There are many ways to do this - some more time and cost-effective than others. They include:

- Subscribing to the publications and internet sites read by your target audience
- Utilizing search engines to find online editions
- Following media-focused newsletters or publications to keep abreast of changes at outlets
- Using a media-focused database that provides:
  - Online access from anywhere
Introduction to Social Marketing Planning

- Geographic, subject, beat, title, pitching tips, search capabilities
- Distribution and delivery mechanisms

Whatever method you choose, familiarize yourself with print, broadcast or online media to learn what each reporter covers and what interests him or her and his/her audience.

If you’ve used a media database to create your media contact list you should consider distributing your news release directly to this list. In addition, consider using a newswire service – it’s one of the most cost-effective ways of directly reaching the media, as well as potential donors or sponsors. (e.g. Canada Newswire http://www.newswire.ca/en/)

Distributing Your News

Newswire services provide a huge benefit to public sector and nonprofit organizations that are trying to establish themselves, increase awareness of their causes, raise money, or solicit sponsorship funds. A commercial newswire can distribute your news release electronically to thousands of major and secondary daily newspapers, weeklies, relevant trade journals, broadcast outlets and other wire services.

The benefit of using a newswire doesn’t stop there. Ever wonder how all those news releases get posted on Google? Through a commercial newswire service is the only way to get visibility on such portals as Google, MSN, Yahoo!, AOL and Excite. Newswires let you reach hundreds of thousands of individuals, decision-makers and other influential people through the Internet.

Some newswire services even offer search engine optimization (SEO) tools, which make news releases more likely to show up higher in search results on leading search engines and keep them on these search engines for up to six months. This is an extremely effective way of reaching stakeholders directly with your news when they are searching for information on particular subjects. Include a URL that links to an opportunity to get involved with your program or cause to make your news release an even more effective tool. Plus, the keyword reporting features provided with these optimization services can help you tailor future messaging and gain a better understanding of how your audience seeks information related to your organization.

A social media release is as an add-on to your traditional news release. It provides an online audience with a place to go for multimedia content and conversation about your message. Social media releases distribute to real simple syndication (RSS) feeds and portfolio email services. They also reach news consumers on the go through mobile devices. You can upload your video content to YouTube, which allows it to be easily viewed, shared and embedded. You can also provide greater options to viewers and journalists by adding both web-friendly, smaller images and print-ready high-resolution images. Including links and important documents and files gives audiences more background information about your release. Opt-in comments enable your audience to have a conversation around your release, while giving you the chance to engage with a community of supporters interested in your issue and organization (http://smr.newswire.ca/en).

Developing Experts and Promoting them to the Media

Developing experts within an organization and creating platforms from which they can provide their opinions is vital to securing lasting media coverage. An organization should always have a few experts on hand to discuss their objectives, explain the cause/issue or point-of-view on a particular subject in detail, and provide support to sponsors.

Profiling key spokespersons on the organization’s website or in widely available expert databases gives reporters easy accessibility to these experts. If your expert can respond to something that is currently in the news, consider sending out a media advisory alerting reporters to the availability of the spokesperson and his/her position on the topic.

Monitoring and Measuring the Effectiveness of your Program

You should always know what articles or postings have been written about your organization or what news of interest to your nonprofit has been published on the Internet and in print. There are tens of thousands of websites and other online information sources that could potentially post something of interest or importance to you, and there are several methods you can use to find this information.
Introduction to Social Marketing Planning

The most basic approach to "monitoring" is manually searching the Internet by inputting keywords into search engines. But this can be time consuming and redundant. A more sophisticated approach is signing up for RSS feeds or subscribing to a service that monitors news sources and provides reports that link to articles based on specific keywords. These services allow you to stay on top of what's being said about your organization and about entities with differing viewpoints, enabling you to make more informed decisions, tweak messaging and get an overall picture of how your organization is being talked about online.

"Measuring" the effectiveness of a proactive PR program is a major challenge for all organizations, whether they are nonprofits, public sector agencies or associations. Measurement, however, is key to analyzing the impact of certain messages, changing messaging mid-program and assessing the quality of coverage. For many organizations monitoring and measuring might appear to be luxuries they can't afford. However, there are many cost-effective services that can go a long way toward helping you understand how your audience may be viewing your information.

With a program or campaign that includes all of these fundamental elements—news releases, targeting and distributing to appropriate media, developing experts, and monitoring and measurement—you have a full-circle approach to your public relations efforts.

9 Simple Steps for Proactive Public Relations

By Hamish Jones

1. Select your target audience - No matter what your organization is, you are not going to be able to sell to everybody. Yes, it would be nice to be able to reach everyone but it's not just going to happen. Tailor your messages to the right target audience.

2. Survey them to check their current knowledge levels - You may not have to survey them directly, but the Internet search engines help you to gauge your target audience's beliefs. A quick Google search and checking forums related to your organization should enable you to understand their current levels of knowledge.

3. Look at how they are reacting with their current knowledge - Your target audience doesn't just know something; they formulate opinions based around this 'knowledge'. What does your target public think about the situation?

4. Set your goals for the campaign - If you are going to do proactive public relations you need to plan your campaign. This involves setting goals of what you'd like to achieve, for example, increased web activity, etc.

5. Select your public relations strategy - Once you have set your goals, your strategy is your overall plan to reach your goals. This is what you need to achieve to reach your goals.

6. Decide on what your persuasive message will be - Once you have developed your goals and strategies, you need to work out what you need to tell those people you are targeting. What will you tell them to reach your goals?

7. Decide on what tactics and tools you could use - What will you do to fulfill your strategy? Will you write press releases? Will you write a blog? Will you be Twittering? What about participating in forums? Or will you combine many of these tactics?

8. Monitor for changes in knowledge and beliefs - Public relations goals and messages can generally be defined as either reputation building or belief changing. You need to monitor what is being said to see or people are being swayed to change their beliefs.

9. Monitor for behavior change - It's not good enough to have changed someone's beliefs; you want to see a change in behavior that means acting like you want them to.


5 http://ezinearticles.com/?9-Simple-Steps-for-Proactive-Public-Relations&id=893783
34. What are the most promising proactive public relations activities for your social marketing initiative?

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Social Media Tools and Tactics

The following section has been adapted from the Centre for Public Sector Marketing Social Media Marketing Workbook prepared by Mike Kujawski.

"Should I be on Facebook? Should I start a blog? Should I buy an island in Second Life? Should I be podcasting?! Tell me what to do!" These are the kind of questions that social media consultants get asked the most. The answer is simple: there is no "universal" answer. Every organization’s situation is unique and there is no magic application. Everything is dependent on your objectives and who your target audience is. This is why you need to pay careful attention to the traditional strategic elements of marketing (objectives, segmentation, targeting and positioning) before deciding on specific social media tactics. Basic marketing elements are as important as ever. They are often ignored and not applied, as many people are anxious to get to the visible “tactics” without a “strategy” in place. The 4P’s of social marketing (product, price, place, and promotion) still apply as well; however, with social media your target audience can collaborate, participate and share with you in their development, hence the constant referral to “two-way” engagement.

Potential social media tools include:

- RSS news feed development
- Blogger relations campaign
- Social media press release development
- Social network community development
- Podcast series creation
- Blog development
- Wiki development
- Micro-blogging participation
- Mash-up tool development
- Mobile web widget development
- Virtual world
- Channels: Facebook, Twitter, Youtube etc.

Social Media Tools and Applications

The amount and quality of tools and applications is growing at an incredible pace. This leads to many skeptics not wanting to invest time in any particular tool in case it’s obsolete by next year. However, if this is your thinking then you’re missing the point. By engaging in social media you’re not investing in the tool, your investing in the people behind that tool (i.e. building genuine relationships). People are real and they are here to stay, no matter which platform they’re using down the road.

So if it is YouTube or Facebook these social media tool examples are mere brainstorming suggestions. There is a wide variety of new cutting-edge social media applications developed daily and most of them can be fully customized (mashed-up) by non-techies thanks to standardized programming languages. You must carefully evaluate the best ones to pursue, paying careful attention to the target audience(s) and objectives that need to be met at the end of the day. The benefits of using social media channels can far outweigh traditional efforts thanks to the viral nature of online communities, especially when they are presented with
content that is relevant to them (i.e. your “product” of the marketing mix). Best of all, most social media engagement channels can easily be monitored and measured for performance.

* Special Thanks to Brian Solis and JESS 3 for the diagram

Never do something just because others are doing it. Out of the many thousands of Facebook groups that exist you can bet that a vast majority of them are abandoned. Don’t do YouTube because your colleagues are doing it. Do what is right for you and your target audiences. Out of the thousands of podcasts started each day many will be cancelled within a few weeks due to lack of subscribers or commitment time. You must choose what is right for you and be sure to do it well.

Pros and Cons of various Social Media (very general)

<table>
<thead>
<tr>
<th>TYPE OF SOCIAL MEDIA TOOL</th>
<th>KEY “MARKETING” ADVANTAGES</th>
<th>KEY “MARKETING” DISADVANTAGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOCIAL NETWORK SERVICE</td>
<td>Ability to act as an online “human voice” by creating a profile of yourself as a representative of organization X</td>
<td>Resistance to any form of “traditional” one-way promotion (especially banner ads)</td>
</tr>
<tr>
<td></td>
<td>Social networks have very specific and highly measurable/targetable audience segments6</td>
<td>Many are “private” and not fully indexed by search engines.</td>
</tr>
</tbody>
</table>

6 The more people fill out their profiles, the better marketers can target them (in terms of relevancy)
# Introduction to Social Marketing Planning

| **BLOG** | Easy to use and set-up  
High search engine visibility  
Allows you to have a dynamic website where you can post content without bothering IT  
Your audience can subscribe via RSS or email to your blog  
Two-way communication channel (ability for comments)  
Strong blogger community (double-edged sword if you don’t abide by the rules) | Negative comments  
Blog SPAM  
Tremendous time commitment |
|---|---|---|
| **MICROBLOGS** | Excellent tool for gauging real-time discussion of current events  
Ability to filter by hashtags⁷  
Extremely easy to use  
60 second “breaking-news” cycle  
Instantaneous response  
Plentitude of third-party applications⁸  
Ability to filter out irrelevant noise  
Ability to follow niche communities | Still in the “rapid growth” stage compared to other social media.  
Learning curve  
Time commitment to build a loyal community |
| **WIKI** | Excellent collaborative participation tool  
Can be used for marketing research  
Great way to get your target audience especially the influencers to do your work for you voluntarily⁹  
Great for self-organizing meetings and conferences | Concept can be hard for some users to get, even when presented in a simple way |
| **PODCAST** | Great way to keep your audience up-to-date without soliciting their email boxes.  
Great way to engage audience during their commute to work or personal time  
Great channel for people that love to speak as opposed to write | For maximum experience a portable MP3 player is required to really feel the “portability” advantage of podcasting |

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⁷ [http://hashtags.org/](http://hashtags.org/)  
⁸ [http://search.twitter.com/apps](http://search.twitter.com/apps)
### WEB WIDGET
- Portable
- Cross-platform compatible
- Easy to use and understand
- Highly customizable
- Very useful and practical

**Potential installation issues if users do not have account admin privileges**

### MASH-UP
- Fully customizable
- Mind-boggling possibilities
- Allows you to create your own tool/application with a specific purpose based on the collaborative work of the community (e.g. their tagging efforts)

**Might have a learning curve if complex, especially since every mash-up is different**

### VIRTUAL WORLD
- Ability to reach early adopters and influencers
- Very unique means of engaging/meeting with your audience in a 3D setting
- Addresses the interaction needs of the "Net Generation"

**Slow and hard to use for mainstream users**
- Hardware requirements
- Community resentment for anything that seems overtly promotional in nature

### 35. Which social media tools/applications should you use?

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Remember to start slowly; you don't have to do everything at once. It's best to use a phased approach so long as everything is integrated. Remember to look carefully at your objectives, positioning and target audience to see if it even makes sense to use a particular tool. Choose three tools/applications to start.
*You can save considerable marketing research dollars by engaging the audience in the design of certain aspects of your marketing plan*

<table>
<thead>
<tr>
<th>TYPE OF SOCIAL MEDIA</th>
<th>SPECIFIC APPLICATION</th>
<th>REASON FOR USING IT</th>
<th>POTENTIAL BARRIERS</th>
<th>RISK MITIGATION</th>
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36. Which communications vehicles/tactics other than the four low-cost promotional tactics above do you believe would be the most effective to reach the primary target audience(s)?

Advertising/public service announcements
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Promotional and collateral material
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Publications/posters/ other print materials
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Introduction to Social Marketing Planning

Educational products

Direct marketing

<table>
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<tr>
<th>TARGET AUDIENCE</th>
<th>KEY TACTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRIMARY AND SECONDARY TARGET GROUP(S)</td>
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<tr>
<td>STAKEHOLDERS</td>
<td></td>
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<tr>
<td>INTERNAL/EMPLOYEES</td>
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<tr>
<td>OTHER</td>
<td></td>
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CREATIVE BRIEF

The creative brief is one of the most important elements in implementing a social marketing campaign. A creative brief is like a road map. A good brief leads to imaginative and persuasive communications. A bad brief starts you off in the wrong direction. If you are thinking that you don’t have time to write a brief remember that working from verbal input without a written brief is how public sector and nonprofit organizations waste time and money.

Finding the best way to express anything creatively starts better when all players are involved and agreed on the strategic direction of the social marketing campaign. The creative brief is a working document. It is by and large a process most good organizations will use to ensure that their group and the creative contractor are in agreement regarding the direction of the creative work.

There are number of ways to look at the creative brief, but largely it is a conversation between you and your creative agency or internal creative department that ensures the right flow of aspirations and intentions, as well as the desired end result is achieved.

To stimulate the discussions necessary to ensure the creative work being commissioned for your social marketing campaign there are three key things your creative team needs to know: **Who are we talking to? What do we want them to do? And why should they do it?**

The “Who” tells everything about the target audience the work is aimed, the “What” is the action that this target audience is required to take, and the “Why” gives reason for the “Who” to do the “What.” These may be simple questions initially, but if each is given sufficient time and both parties are clear to each other about the answers, a better brief and therefore a better and more effective creative work will result.

By completing the creative brief you will ensure communications will be meaningful (i.e. benefits that make product desirable), believable (i.e. product will deliver on promised benefits) and distinctive (i.e. how desired behaviour is better choice than competing behaviours).

Creative Brief Template

Creative Brief adapted from: Social Marketing “Influencing Behaviours for Good” (Third Edition) Kotler and Lee pp. 269-271

**Key Message:**
Brief statement that summarizes the bottom-line message. Should include the behaviour you are trying to influence

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**Target Audience:**
Provide demographic, geographic and if possible psychographic profiles.

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Centre of Excellence for Public Sector Marketing
www.cepsm.ca
Current knowledge and beliefs and behaviours relative to desired behaviour as well as competing ones.

Describe targets current “stage of change” and information from TARPARE analysis

Objectives:
What do you want your target audience to know (think)? What do you want your target audience to believe (feel)? And what do you want your target audience to do?

Positioning Statement:
The product positioning statement established in your social marketing plan.

Benefits to Promise:
Key benefits the audience hopes they will receive from adopting a behaviour identified in the core product. The primary benefit may be expressed in terms of the cost that the audience can avoid by adopting the desired behaviour (e.g. stiff penalties for drinking and driving, the cost of buying cigarettes, etc.).
Support for the Promise:
Brief list of additional benefits and highlights from product, price, place strategies established in the process. Highlight those that would most help convince the target audience that they can perform desired behaviour, that benefits are likely, and that they exceed perceived costs.

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Openings:
Times, places and situations when an audience is most attentive and able to act on the message. Some of the input comes from section on barriers and benefits. Additional information may come from secondary research on audience(s) lifestyle and media habits (watching TV, listening to radio, surfing the Internet and interacting with friends and families)

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MONITORING AND EVALUATION

The starting point for social marketing monitoring and evaluations is ensuring that you have clear measurable objectives.

Monitoring vs. Evaluation

You need to distinguish between processes for monitoring and evaluation, which often tends to be misunderstood. Monitoring is usually done shortly after you launch a campaign, but done while the campaign is still running to help you determine whether you need to make any adjustments to the campaign. You don’t want to be spending funds on a campaign that is not resonating with your target audience and more importantly, not achieving your social marketing objectives.

Evaluation is a final report on the overall results of the campaign responding to your achievement of objectives for changes in knowledge, beliefs/attitude and behaviours, etc. In addition, evaluations also look at how effectively social marketing tactics and activities were delivered (i.e. on time and on budget). It also looks at what worked, what didn’t and lessons learned for future campaigns?

Outcomes, Outputs and Impacts

Social marketers need to understand the difference between measuring outputs, outcomes and impacts. Outputs/process measures could include web analytics and metrics, reach and frequency of a multimedia campaign, media coverage and number of materials distributed. It may include accomplishments of your planned activities. If you were involved with a strategic partner you may want to evaluate relationships too.

Outcomes on the other hand are quite different, as you are now measuring response to your outputs and require primary research like tracking surveys and benchmarks to determine if you achieved your measurable goals. These may include changes in behaviour or behaviour intent (i.e. moving people from pre-contemplation to contemplation and/or preparation/action stages), changes in knowledge (e.g. awareness of important facts), changes in beliefs (including changes in attitudes), opinions, perceptions and values. It may include responses to campaign tactics like response to direct marketing campaigns, requests for more information via the Internet, impact of your Facebook or Twitter campaign, purchase of products and services (e.g. emergency kits), participation rates and client satisfaction levels (e.g. counseling)

Campaign awareness, although not normally a key indicator of success in a social marketing campaign, will provide some feedback on the campaign being noted or recalled (e.g. unaided and aided awareness).

Other outcomes include partnerships and strategic alliances created and the activities of your partners (e.g. funds or in-kind committed to the program). If running an upstream campaign you could consider measuring impact on policy or infrastructure changes (e.g. banning of smoking in bars and restaurants, removal of highly sugared products from primary schools).

Impact measures are the most difficult and costly of all evaluations. They can include lives saved, diseases prevented, violence against children, seniors, women and animals, etc. prevented, injuries avoided, improvement in the environment, (e.g. landfill reduction) and crimes prevented.

Attribution is very challenging on these types of measures which can normally be accessed from data sources like Statistics Canada, census data and other government, private sector data sources available online or purchased. Also, you need to demonstrate that your campaign had impact on these changes (e.g. prevention of Sudden Death Syndrome or Fetal Alcohol Syndrome). It is very important that you look at long-term measures as there can be significant lags between knowledge, belief and behaviour change (rationale for long term campaigns). Your methodology for evaluation needs to control for variables that may also be contributing to the social issue.

If you are measuring outputs, outcomes or impacts it is important to clearly define upfront when setting objectives and measures in the planning stages.
Example

Tools used to measure tactics in Health Canada “West Nile Virus” campaign were:

- In-store retail surveys (as strategic alliances with retail partners was a distribution mechanism)
- Qualitative interviews with store managers
- Ongoing media monitoring
- Targeted fax survey with First Nations band councils, community health and friendship centres that distributed information to the public

When to measure is important. For example, using baseline tracking and monitoring during a campaign (to be used in a pre- and post-situation), and post-campaign measurement after campaign is completed.

Evaluation Methods

Surveys of the target audience(s) are effective for measuring outcomes. Surveys can be completed by telephone, online, mail or in person. Survey results are most effective when they can be measured against a benchmark study or a control group that have not had access to the campaign.

Benchmark surveys are conducted before a campaign to determine knowledge, behaviours, beliefs and attitudes of the target audience(s). After the campaign the same questions are asked in a tracking survey. The results of both studies are compared to determine whether the campaign has had an effect on the target audience(s).

More qualitative techniques, such as focus groups or interviews with professionals who have access to the audience, may also be used to measure objectives and may provide feedback, which can be used to improve campaign materials.

Also, records and databases will be useful for measuring campaign elements such as web analytics, records of phone calls, number of visits to a counselor or clinic, number of people served, coupons redeemed, objects sold, requests received, etc.

It is useful to have access to scientific and or technical surveys conducted by government, nonprofit organizations, the private sector and academic institutions. It may be quite challenging to link social marketing changes to scientific studies (e.g. epidemiological studies in the health area), as there are numerous variables to consider.
Example

The measurable objectives of Health Canada's Sudden Infant Death Syndrome (SIDS) "Back to Sleep" campaign were to:

- Increase knowledge of the risks of SIDS in Canada over the next five years.
- Increase knowledge of the steps to reduce the risk of SIDS over the next five years.
- Reduce the risk of SIDS by 10% in Canada over the next five years.

The results of the SIDS "Back to Sleep" campaign were measured by comparing results of a baseline survey and the results of a similar survey conducted after the campaign. The research results concluded that:

- Awareness of the message "the back sleeping position reduces the risk of SIDS" increased from 44% to 66%.
- Seventy percent (70%) of parents and caregivers said they placed infants on their back to sleep.
- Sixty-seven percent (67%) of Health Professionals advised a back sleeping position in 2001, up from 21%.

Since the original Health Canada campaign on SIDS titled "Sweet Dreams" was launched, the incidence of SIDS fell from 0.7 deaths to 0.45 deaths out of 1000 live births. Although this decrease cannot be attributed solely to Health Canada's efforts, according to the Canadian Perinatal Surveillance System: "This decline coincides with the identification of modifiable risk factors and public education regarding these factors".

Plans should detail how monitoring and evaluation data will be used. Evaluation and monitoring provide evidence that your campaign is reaching objectives and may indicate areas where improvements can be made. Having an evaluation that proves the success of the campaign can be used to support requests for future funding and expansion.

37. What objectives will you measure? (See objectives)

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Once back to the office you will need to decide.

38. What techniques, mechanisms and methodologies will you use to measure effectiveness?

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39. How will you use the results of your monitoring and evaluation?

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BUDGETING

Your marketing plan should contain budgets, including the costs of creating, producing, printing, and distributing campaign materials. All promotional tactics should be quantified by the cost per person reached.

There are several different ways of determining a budget. The most common are:

- **The affordable method** - budget is based on current or expected available resources.
- **The competitive-parity method** - budget is established based on what it has cost others to conduct a similar campaign.
- **The objective-and-task method** - budget is established by reviewing specific objectives identifying tasks associated with objectives and the expected costs of the tasks.

The preferred method is the objective-and-task method as the budget is determined by needs outlined in your plan and what will be most effective. This method involves reviewing specific objectives, identifying the tasks that must be performed to achieve these objectives and estimating the costs associated with performing these tasks. Costs include those related to developing and implementing elements of the marketing mix, including funds for monitoring and evaluation.

**Example**

While Health Canada’s campaigns are fully financed by the Government of Canada, Health Canada has formed strategic alliances that have expanded the resources through in-kind contributions of services. For an HIV/AIDS prevention campaign, Health Canada formed an alliance with Much Music and MusiquePlus. As part of the collaboration MuchMusic and MusiquePlus:

- Produced a one hour national broadcast and a segment for “Cable in the Classroom”,
- Filmed and edited safer sex public service announcements, and
- Arranged a six-week Internet challenge to youth to come up with HIV prevention slogans.

The value of the services provided by the partner in this case was estimated to be $6 million.

However, using this method you may find that your plans are greater than your budget. If this is the case, you may consider raising funds or in-kind resources from like-minded foundations, associations, corporations and/or government agencies.
Once you get back to the office you will need to decide:

40. What costs will be associated with your strategies (product, price, place, promotion) and evaluation-related strategies?
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41. If costs exceed available funds what external funding sources can be explored?
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IMPLEMENTATION PLAN

The next phase of the work on this campaign is to develop a full implementation and work plan. An implementation plan turns our plans into actions.

Implementation and work plans will cover specifics of:

- What actions need to be performed
- Detailed strategies and tactics
- Full rollout strategies with time lines and critical path
- Who will be responsible
- When activities will be completed
- Detailed costs associated with each activity
- Plan for hiring contractors including creative production of products, research and testing

Establishing phases may be necessary if resources are not available to perform all tasks at the same time.

Phases can be organized in many ways for example by:

- **Target audience** - the campaign may start with a focus on one group and add tactics to reach other targets in later phases.
- **Geography** - the campaign begins in one region and is rolled out to others.
- **Objectives** - once one objective is achieved the next phase can begin and will work towards other objectives (in this case you would want to work towards knowledge and belief objectives first).
- **By stage of change** - each phase works towards moving the target audience to the next level on the stages of change model.
- A mix of several factors.

Your implementation plan should also act as a work plan to keep you on track and measure progress in implementing your campaign.

42. What are the phases of the campaign?

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43. What tasks are associated with each phase?

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44. For each task, who will be responsible, when will it be completed and what is the anticipated cost?

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APPENDIX 1 - SOCIAL MARKETING PLAN TEMPLATE

Situational Analysis

Introduction

Background and Research

Environmental Scan
- PEST Analysis
- SWOT Analysis

Definition of Market Segments (Market Research)

Market Segmentation and Target Markets
- Primary and Secondary Target Audiences

Social Norms and Competing Behaviours and Barriers

Upstream Social Marketing

Objectives
- Behaviour Objectives
- Knowledge Objectives
- Belief Objectives
- Specific Measurable Objectives

Marketing Strategy
- Product
  - Positioning Statement
- Price
- Place
- Promotion
  - Key Messages
  - Promotional Tactics

Monitoring and Evaluation Plan
- Evaluation and Tracking Plans
- Application of evaluation results

Budget

Implementation Plan

<table>
<thead>
<tr>
<th>TASK</th>
<th>RESPONSIBLE PARTY</th>
<th>COMPLETION DATE</th>
<th>EXPECTED COST</th>
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</table>
APPENDIX 2 - BEST PRACTICES IN SOCIAL MARKETING

Messaging:
- Specify the desired objective.
- Specify the desired action required (call to action).
- Focus on personal relevance of issue to each member of audience.
- Adapt creative style to specific audience.
- Communicate benefits and focus on immediate, high-probability consequences of positive behaviour.
- Portray people with which members of target group can identify.
- The messenger in many cases can be much more important than the message.
- Celebrities and popular spokespersons can be effective to change social norms.
- Positive reinforcement can be effective.
- More emphasis is needed in creating a climate conducive to social change.
- “Blame the victim” approach hurts credibility of social marketing.
- Upstream approaches and strategies help credibility of social marketing.

Emotions:
- Play on emotions.
- Do not be moralistic. Guilt messages work less well, however can be effective in certain circumstances.
- Pity and altruistic appeals do not work well.
- Humour can be difficult. Use it with caution.

When speaking to youth:
- Do not highlight that communication came from an authority.
- Do not present an adult viewpoint or lecture.
- Use online communications, esp. social media, as key tactics and approaches in reaching audiences.
- Use self-confident, attractive actors in television advertising that look a few years older than the target.
- Do not show high-risk youth in negative light.
- Do not talk over youth heads or talk down to them.
- Make sure you communications are honest and unbiased; this leads youth to informed decisions.

Demonstrate the desired behaviour:
- Showing the desirable behaviour serves as a guide to appropriate behaviour.
- Promote alternative behaviours as substitutes for undesirable present behaviours.
- Examples: designated driver in DWI, physically active (use stairs, not elevator).

Multi-year consistency in theme:
- Consistency is required to move target audiences through the various “stages of change”.
- Variety in creative approach from one period to the other and one group to the other is required to keep the attention-grabbing power of the campaign (however messages have to be consistent).

Additional tips:
- Formative research and tracking are essential.
- Strategic alliances are extremely important, but you must have guidelines and policies.
- With rare exception only long-term multi-year campaigns can produce measurable changes, but management/funders want immediate results.
- Social marketing campaigns need to achieve a high status on the media, political and social agendas creating a favourable environment for social change.
- Educational products, proactive media relations need to be integrated into marketing campaign.
APPENDIX 3 – BRANDING AND SOCIAL MARKETING

“The Guide to Branding in the Public and Not-for-Profit Sectors” go to: http://cepsm.ca/resources/

Branding an organization is pervasive and fairly easy to understand and recognize. However, branding in social marketing is not as common but becoming more popular as it is very effective in creating visibility and ensures memorability.

“Nonprofits and government agencies are generally several steps behind the commercial sector in applying marketing concepts to their health and social issues. Branding is a word that is thrown around a lot by marketers of all stripes without a complete understanding of what it actually means. We know we want to have a strong brand, but to some that just means crafting a logo and tagline. A brand is much more than just the product itself or the visuals you use to promote it”. (Nedra Kline Weinreich)

The brand is the marketer's most advanced emotional tool. It combines and reinforces the functional and emotional benefits of the offering and so adds value, encouraging consumption and loyalty. A good brand facilitates recognition, makes a promise, and, provided the full marketing back-up is in place, delivers satisfaction. Brands can provide very practical benefits. For example for young people, quick and clear brand identification can make both the buying and smoking of forbidden products such as cigarettes much less risky. Over time, brands become a fast powerful way of confirming the synergy between marketer and customer. (Social Marketing: Influencing Behaviors for Good by Philip Kotler, Nancy R. Lee)

Brands can provide very practical benefits. Over time, brands become a fast powerful way of confirming the synergy between marketer and customer.

There is also evidence that branding may be a particularly effective way to reach people in hard to reach communities. Experts in branding have concluded that the symbolic appeal of brands is particularly effective in targeting those individuals who do not have the time, skills and motivation to evaluate the objective attributes and benefits of a particular campaign. A recent review conducted on behalf of the UK’s National Centre for Health and Clinical Excellence also suggests that brands can be an effective way of reaching information – deprived communities. Branding with these communities seems to hold considerable promise. (Gerald Hastings in social marketing ... why should the devil have all the best tunes? pg.: 100)

In social marketing, your brand is how your audience thinks about your program and connects with it emotionally. It’s the combination of how you market your programs and how the audience experiences it. It’s the feeling that by adopting certain behaviour someone becomes part of a group, and membership in that group reflects the image of who that person aspires to be.

In the case of social marketing, the product is the behaviour you are promoting — if the audience tries doing what you want them to do but has an awful experience the brand image suffers. Or the brand may be your organization, with various programs, products and services that you offer falling within that brand. So branding involves strategically crafting all the elements of your audience's interactions with your campaign and its components so that they support the right image and evoke the right emotions.

The following list includes a few of the stronger brands. In these cases names that have been used to identify programs and products and are applied consistently in an integrated way that is very important for social marketers.

- “ParticipACTION”… Encouraging physical activity (Canada)
- “VERB” … Encouraging physical activity (USA)
- “Break Free”… Anti-smoking (Canada)
- “Truth” … Anti-smoking (USA)
- “McGruff the Crime Dog”… Crime prevention
- “Operation Red Nose/Nez Rouge”… Drinking and driving (Canada)
- “Road Crew” … Drinking and driving (USA)
- “Don’t mess with Texas”… Litter prevention (USA)
- “Rock the vote”… Voting
- “Back to Sleep”… Sudden Infant Death Syndrome
- “Energy Star “… Energy conservation
- “One-Tonne Challenge”… Climate change (Canada)
- “Smokey the Bear”… Wildfire prevention
• “5 A Day”… Nutrition
• “Fight” … “fight fear,” “fight distress” and “fight chaos” - Military recruiting campaign (Canada)
• “Be all you can be”… Military recruiting campaign (USA)
• “Yes You Can”… International Competitiveness (Canada)
• “Believe in Yourself”… Student Loan (Canada)
APPENDIX 4 - SOCIAL MARKETING ARTICLE

Social Marketing... A Powerful Process for Influencing and Changing Behaviour

By Jim Mintz
Managing Partner and Director of the Centre of Excellence for Public Sector Marketing

Social marketing (not to be confused with social media marketing) was “born” as a discipline in the 1970s, when Philip Kotler and Gerald Zaltman realized that the same marketing principles that were being used to sell products to consumers could be used to “sell” ideas, attitudes and behaviors.

Social marketing is a planned process for influencing change. It is a modified term of conventional consumer marketing with its components of marketing (4P’s) and consumer research, advertising and promotion (including positioning, segmentation, creative strategy, message design and testing, media strategy and planning, and effective tracking).

Social marketing is a new way of thinking about some very old human endeavors. As long as there have been social systems there have been attempts to inform, persuade, influence and motivate, to gain acceptance for new adherents to certain sets of ideas, to promote causes, to win over particular groups, and to reinforce or change behaviours.

Social marketing has deep roots in psychology, sociology, political science, communication theory and anthropology. Its practical roots stem from disciplines such as marketing communications, marketing strategy and research.

In the past few decades campaigns have been launched in the following areas:

- Health promotion (e.g. anti-smoking, safety, drug abuse, drinking and driving, HIV/AIDS, healthy eating, physical activity, immunization, breast cancer screening, mental health, breast feeding, family planning, etc.).
- Environment (e.g. safer water, clean air, energy conservation, recycling, preservation of national parks and forests, etc.).
- Education (e.g. literacy, stay in school, etc.).
- Economy (e.g. boosts job skills and training, attracts investors, revitalizes older cities, etc.).
- Other issues like family violence, bullying, public safety and emergency preparedness, airport security, identity theft, human rights, encouraging people to vote and anti-racism campaigns among many others.

Social marketing combines the best elements of the traditional approaches to social change in an integrated planning and action framework, and utilizes advances in communication technology and marketing skills. It uses marketing techniques to generate discussion and promote information, and change attitudes and behaviours. Social marketing should have a long-term outlook based on continuing programs rather than one-off initiatives. The planning process starts and finishes with research, and research is conducted throughout to inform the development of the strategy.

In addition, social marketing engages practitioners to fully understand and appreciate concepts like social norms, competing behaviours and barriers. To succeed in the field of social marketing and influence behavior change, marketers need to understand what their target audiences perceive to be the barriers to change. Social marketers focus on removing barriers to an activity while simultaneously enhancing the benefits. There is a tendency for individuals to respond positively to actions that are highly beneficial and have few barriers. Social marketers conduct research to discover the key barriers and potential benefits and then develop strategies and tactics to address them.

In recent years, experts have come to reject the narrow victim-blaming approach of focusing all of a social marketing campaign on the individual. Instead experts have emphasized that social marketing must also be used to:

- Bring about changes in the social and structural factors that impinge on an individual’s opportunities, capacities, and right to a healthy and fulfilling life; and
Introduction to Social Marketing Planning

- Target individuals/groups that have the power to make policy, regulatory and legislative changes that protect and enhance people’s quality of life.

Social Marketing can be used as a tool to integrate and coordinate other components of an organization’s strategies and tactics, including: training, education programs, advocacy, strategic communications, public affairs, outreach activities, legislation, research and public policy.

A social marketing approach gives organizations a single approach that may include:

- Mobilizing communities
- Influencing the media
- Advocacy and awareness
- Building strategic alliances with business, government and non-government organizations.

There is this persistent myth that you need a great deal of funding to conduct social marketing campaigns. Social marketing sometimes gets confused with social advertising. Advertising may be a useful tactic in some cases, but some of the most effective social marketing campaigns have not used advertising. Social marketing is a way of thinking and approaching behavioral change in a strategic way and not a way of spending money on advertising and promotion. It is a tool; or rather a process and set of tools wrapped in a philosophy for helping an organization do what it wants to do to better society.

The ultimate objective of social marketing is to influence/change behaviour. It is not a process to solely create awareness or educate target audiences. With rare exception only long-term multi-year campaigns can produce measurable changes. Social marketing initiatives measure performance through direct and indirect qualitative and quantitative methods and performance measurement requiring measurable objectives and benchmarks.

Many social marketing programs are developed by people who are not skilled in the field of marketing and not trained on how to use the marketing mix (4P’s) and only focus on the communications function of marketing. However, to be successful in marketing, it is absolutely crucial to look at all of the 4P’s (product, price, place and promotion).

After many years of leading the social marketing group at Health Canada and running many campaigns, I moved into the field of consulting and training and came to realize that many public sector organizations do not have the skillset and training to develop and implement a comprehensive social marketing campaign. The major reason for ineffective social marketing initiatives is caused by organizations not preparing a strategic social marketing plan. Flying by the “seat of your pants” without a social marketing plan (not a communications plan) is a recipe for failure.

To address this major challenge our organization, the Centre of Excellence for Public Sector Marketing, developed a social marketing workbook that takes you through a step-by-step structured approach to preparing a social marketing plan.

Published in Within Reach Winter 2010, Public Works and Government Services Canada: Distributed by the Advertising Coordination and Partnerships Directorate
APPENDIX 5 - TEN COMMANDMENTS OF SOCIAL MARKETING

1. If staff running a campaign are not trained in marketing, or do not have a good grasp of marketing concepts and theory, a campaign initiative will likely not succeed.

2. There are 4P’s to marketing, but check out social marketing campaigns and see how many actually address the 4P’s of marketing… very few. Most campaigns tend to be social communications or advertising campaigns but few are really social marketing.

3. Segmentation is the key to effective social marketing but many campaigns are not targeted and focus on the “general public”. Some campaigns use demographics and geographic segmentation, but remember with social marketing you are dealing with behaviour change. The most important type of segmentation in social marketing is psychographics, but how many social marketers have used psychographic segmentation to develop campaigns… again, very few.

4. Examine the factors influencing the adoption of the behaviour change (i.e. perceived barriers/potential benefits for targeted behaviour as well as competing behaviours /forces).

5. Pay attention to social norms, which are people’s beliefs about the attitudes and behaviours that are normal, acceptable, or even expected in a particular social context. In many situations, people’s perception of these norms will greatly influence their behaviour.

6. Employ upstream efforts that aim to change the political, social, legal and physical or public policy environment by giving messages to industry or government.

7. Objectives must be measurable. Also set objectives for the following three types of objectives: behaviour objectives, belief objectives, knowledge objectives

8. Positioning is a key element to social marketing. In social marketing, products are hard to promote because of their high “price”. Products, like behaviours and attitudes, require long-term commitments and do not sell as easily as a bar of soap or a car.

9. Innovation in methods/tactics used to deliver messages is key to success in social marketing. Three tactics that tend to be overlooked are: Face-to-face marketing, Strategic Alliances, Social Media Marketing.

10. Evaluate, evaluate, evaluate! If you have measureable objectives evaluation should not be difficult.

The full document is available by going to my blog http://jimmintz.wordpress.com/2009/04/30/ten-commandments-of-social-marketing-revisted/
APPENDIX 6 – CEPSM RESOURCES

Be sure to regularly browse through CEPSM free online resources.

The URL is http://cepsm.ca/resources/

For CEPSM training and education programs http://cepsm.ca/category/events
APPENDIX 7 – SOCIAL MARKETING RESOURCES

Social Marketing Websites

- The Chartered Institute of Marketing [http://www.cim.co.uk/events/MIGs/socialmrktg.aspx](http://www.cim.co.uk/events/MIGs/socialmrktg.aspx)
- Social Marketing Quarterly [http://www.tandfonline.com/toc/usmq20/current](http://www.tandfonline.com/toc/usmq20/current)
- World Social Marketing [http://www.youtube.com/watch?v=Aih6dcfb2TM](http://www.youtube.com/watch?v=Aih6dcfb2TM)
- The National Social Marketing Centre (The NSMC) [http://thensmc.com/](http://thensmc.com/)

Training & Consulting In Social Marketing

- [http://cepsm.ca/services/training/](http://cepsm.ca/services/training/)
- [http://cepsm.ca/services/consulting/social-marketing-for-behaviour-change/](http://cepsm.ca/services/consulting/social-marketing-for-behaviour-change/)

Social Marketing Books

**Social Marketing Planning Workbook**  James (Jim) H. Mintz (Author)
Centre of Excellence for Public Sector Marketing (CEPSM)

**Social Marketing: Influencing Behaviors for Good**  Nancy R Lee (Author), Philip Kotter (Author)

**Social Marketing: From Tunes to Symphonies**  Gerard Hastings (Author), Christine Domegan (Author)

**Principles and Practice Of Social Marketing: An International Perspective**  Rob Donovan (Author), Nadine Henley (Author)

**Social Marketing and Public Health: Theory and Practice**  Jeff French (Editor), Clive Blair-Stevens (Editor), Dominic McVey (Editor), Rowena Merritt (Editor)

**Hands-On Social Marketing: A Step-By-Step Guide To Designing Change For Good**  Nedra K. (Kline) Weinreich (Author)
APPENDIX 8 – OVERVIEW OF A MODIFIED LOGIC MODEL

A logic model is a visual schematic that organizes program evaluative measures into categories that can be measured and reported on using a "logical" flow, beginning with program inputs and outputs, moving on to program effects in terms of outcomes and impact, and ending with (ideally) reporting on returns on investment. The difficulty of reporting increases the further one moves to the right on the model.

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Outputs</th>
<th>Outcomes</th>
<th>Impact</th>
<th>Return on Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Money</td>
<td>• Number of materials, messages, calls made, events held, social media tactics</td>
<td>• Changes in behaviour</td>
<td>• Improvements in health</td>
<td>• Cost to change one behavior</td>
</tr>
<tr>
<td>• Staff time</td>
<td>• Reach and frequency of communications</td>
<td>• Number of related products &amp; services sold</td>
<td>• Lives saved</td>
<td>• For every dollar spent, dollars saved or generated</td>
</tr>
<tr>
<td>• Volunteer hours</td>
<td>• Free (earned) media coverage</td>
<td>• Changes in behavioural intent, knowledge &amp; beliefs</td>
<td>• Injuries prevented</td>
<td>• After subtracting expenses, what is the rate of return on investment</td>
</tr>
<tr>
<td>• Existing materials used</td>
<td>• Paid media impressions and cost per impression</td>
<td>• Responses to campaign elements</td>
<td>• Water quality improved</td>
<td></td>
</tr>
<tr>
<td>• Distribution channels utilized</td>
<td>• Implementation of program elements (e.g., whether on time, on budget)</td>
<td>• New partnerships and contributions created</td>
<td>• Air quality improved</td>
<td></td>
</tr>
<tr>
<td>• Existing partner contributions</td>
<td></td>
<td>• Policy changes</td>
<td>• Landfill reduced</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Animal cruelty reduced</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Crimes prevented</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Financial well-being improved</td>
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*Source: Nancyrlee@msn.com
BIBLIOGRAPHY

The information contained in this workshop was developed using the Health Canada e-learning tool and the following resources:

Notes