



# Social Marketing

## What is Social Marketing?

*“it is the design, implementation and control of programs designed to influence the acceptability of a social idea or practice by a target group”*  
(Philip Kotler)

## SOCIAL MARKETING . . . is a strategy for behavior change

*It is:*

- ▶ strategic
- ▶ essential
- ▶ long term
- ▶ client driven
- ▶ communication based

**Client Satisfaction *guides* the whole marketing system**

- Understand your target's needs
- Develop strategies that reflect those needs





# Social Marketing

## Social Marketing Planning Process:

1. Set your objectives
2. Analyze your audience
3. Analyze the marketing environment
4. Set measurable outcomes & timelines
5. Plan & develop your strategy
6. Build in an evaluation
7. Implement your plan

## Two *important* factors:

1. build a relationship with the target audience. Totally commit to seeing the issue, the benefits of change, the reasons for not changing, and the barriers to change through the eyes of the target audience
2. understand the process of change the members of the targeted audience will have to work through:
  - ⌚ shift in attitude
  - ⌚ change in their view of themselves
  - ⌚ change in their view of their relationships with others
  - ⌚ change in lifelong habits, values & behaviors





# Set Your Objectives

Objectives provide the benchmark for measuring outcomes

Objectives should be	
<b>SMART</b>	<i>Specific</i> <i>Measurable</i> <i>Attainable</i> <i>Realistic</i> <i>Time limited</i>

## Important questions to ask yourself:

- What is our *mission/mandate*?
- What are our *strengths*?
- What are our *weaknesses*?
- Who is our *client*?
- What is our *product*?
- What does the client consider of *value*?
- How well have we been meeting *client needs*?
- What have been the *results*?
- What are the *opportunities*?
- What is the *plan of action* for change?

**DECIDE** *what* you want your audience to *know, think* and/or *do*.





# Set Your Objectives

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Look at the overall goals and mission statement of your organization to identify appropriate objectives for your initiative.

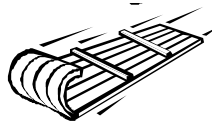
Examples of campaign objectives:

**1) Infant Car Seat Example**



The percentage of correctly installed infant car seats will increase amongst parents of children born in this calendar year in the Capital Health Region.

**2) Tobogganing Example**



The incidence rate of tobogganing injuries amongst elementary school-aged children will be reduced at ABC Elementary School over the upcoming winter season.





# Audience Analysis

**Spend 50% of planning time learning & understanding your audience**

**Segmentation** is the process of dividing a large group into smaller groups with similar habits, needs, and characteristics. As marketers begin to segment and target clients, their requirements evolve.

**Primary target** is the group you want to reach and influence most. They will receive the most attention, and materials should be targeted to them.

**Secondary target** are those people who find your message meaningful and may help you reach your primary audience.

## UNDERSTAND THE CLIENT BY:

### Demographics

age  
gender  
level of education  
nationality  
income  
cultural background  
religion  
language  
occupation  
urban, rural, suburban  
climate, north, south

### Psychographics

beliefs  
values  
lifestyles - activities & interest  
social norms  
media preferences  
risk preferences  
perceived risks  
perceived costs  
perceived benefits  
stage of behavior change  
attitudes & opinions

### Important questions to ask yourself:

- Who is our target?
- Why would they use our goods?
- What is in it for them?
- What features of our product appeals to them?
- When & where is our product used by them?
- How will we inform them about our product?
- Does it fit with their needs, wants and lifestyle?





# Audience Analysis

Practical Application Sample (...cont'd)

Get to know your audience - what they think, what they do, what they believe.

Following examples as shown in **(1) Set Your Objectives**

## 1) Infant Car Seat Example



- Who are new parents? Where do they live? What do they do - during the day and evening? Get information on the demographics by area of the city, etc.
- How many use a vehicle to travel with their infant?
- Are they concerned with installing their infant's car seat correctly?
- Are they willing to give up free time to learn?
- Do they need incentives? like what?
- Where can you reach them?
- Are they willing to come out to a centre:
- When is a convenient time for them?

Talk ... Talk ... Talk ... to many new parents to hear their concerns and perceived barriers.

## 2) Tobogganing Example



- Where are tobogganing injuries happening?
- When - at night? weekends? later evening?
  - at the beginning of the winter season? or mid?
- What do these children know about safe tobogganing?
- What do they think about safe tobogganing? (not cool?)
- With a variety of developmental stages in children, try to segment this audience into smaller groups.
- Who can the secondary target be? parents? teachers?
- Where can you reach these children? school?
- How can you reach these children? video? stickers for young children? contest?
- What grabs their attention? music? bright colours?





# Assess Marketing Environment

The environmental variables are those factors which are out of the marketer's control. Identify environmental factors which present an opportunity or a threat to your social marketing plan.

## Important questions to ask yourself:

- Who is the competition?
- Who/what is the competition for attention?
- Who are the opponents of the cause?
- What are the legal issues?
- What are the political issues?
- What are the ethical issues?
- What are the social issues?
- What are the economic issues?

## Analyze your organization's environment:

- What are the skills & expertise of the employees involved?
- What are the available financial & material resources?
- Are there potential partners - who are they? Why them?
- What communication/media channels are accessible to us?
- What is the long-term plan of our organization?
- What is our organization's capacity to do this?





# Assess Marketing Environment

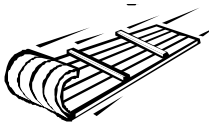
Practical Application Sample ...(cont'd)

## 1) Infant Car Seat Example



- Who and what else is attempting to get the attention of new parents?  
i.e. magazines, book clubs, education funds, classes
- Are there language and cultural barriers?
- What other agencies also address this concern? Can you work with them?
- How much free time do new parents have?
- What does your organization have available as resources (financial, skilled staff, etc.)

## 2) Tobogganing Example



- What is the relationship between your organization and the school boards like?  
are you credible in their eyes?
- What is grabbing this target audience's attention at the present time?
- Do any other agencies address this issue? how? are they a possible partner?
- What involvement is occurring with parents?
- What media channels do children connect with? (not newspaper, but what about radio? posters? or TV?)







# Set Outcomes & Timelines

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**Objectives become more clear once all the information about the target audience and marketing environment is gathered and analyzed.**

**Operationally define the objectives with a time goal attached to them.**

**Identify what you want your target audience to know, think or do, by when.**

(e.g. By the end of December, 50% of parents of children attending playschools in Sherwood Park will not purchase clothing with drawstrings.)

## Important questions to ask yourself:

- What size (%) of the target population do we hope to reach?
- Who do we specifically plan to reach?
- What changes do we wish to observe?
- When do we wish to observe these changes?





# Set Outcomes & Timelines

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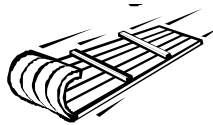
Practical Application Sample ...(cont'd)

**1) Infant Car Seat Example**



All parents of infants born between January 1 and December 31, who reside within the Capital Health Region, will receive a demonstration and inspection for correct infant car seat installation when visiting their public health centre for the 2 month immunization of the infant.

**2) Tobogganing Example**



All children at ABC Elementary School will attend an education and promotion program on safe tobogganing by the end of November.





# Plan a Strategy

The marketing strategy is the “big picture”, the core plan of what an organization will do within a market. Two key inter-related parts are the **target market** (step #2) and the **marketing mix**.

The marketing mix consists of:

- Product** - the knowledge, attitudes or behavior you want the audience to adopt
- Price** - what audience members must give up to receive the program’s benefits: time, lifestyle change or money
- Promotion** - communication of the message; persuades the target audience that the product is worth the price
- Place** - the positioning of the message: where & how the target audience will be reached.

**Positioning** is a method of cutting through the clutter of competitors and being noticed by the target group. *“Positioning is not what you do to the product. Positioning is what you do to the mind of the prospect.”*

**Positioning can be the most crucial aspect of any communications strategy.**

The message needs to be simple, easy to understand and **capture the receiver’s attention**. Communicate the same message in a variety of ways.



# Plan a Strategy

## Important questions to ask yourself:

- What do we want people to think of when they hear our name?
- How do I want the product perceived by the target audience?
- How will our actions help convey the positioning message?
- What makes our product different from others?
- What are the best methods to reach the target audience?
- What media are they most exposed to?
- What media are they most influenced by?
- Where will clients be able to obtain our product?
- Is the message attention-getting? clear? relevant? persuasive? credible?

## Communication channels

newsletters	radio	outdoor advertising	phone
newspapers	mail	computer-based	group events
television	print	point-of-purchase information	informal networks
contests	fairs	presentations	other organizations

The elements of a successful social marketing campaign are:

the right product

at the right time

in the right place

and backed by the right promotion (Mintz, 1988).





# Plan a Strategy

Practical Application Sample ...(cont'd)

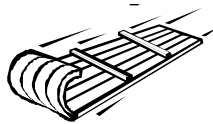
## 1) Infant Car Seat Example



- The product is a personal demonstration with the parents and nurse on installing their particular infant car seat correctly.
- The price is at no cost to the parents, other than a few minutes of their time.
- Promotion can be done by posters in the clinic, doctors' offices, hospitals.
- Also, offer to give this demonstration when parents book the appointment.
- Develop a message that captures new parents' attention:

i.e. *Don't lose sleep --- install your infant's car seat*  
or *Get a good sleep tonight . . . buckle your baby in right*

## 2) Tobogganing Example



- The product could be a video, poster, stickers or buttons.
- It may be a contest or a colouring page for younger children. Match the children's developmental stage.
- Your organization will need a budget to develop any promotional tools. The price for this target audience is giving up some of their time to participate in the education program.
- Develop a catchy slogan i.e. *Have a thrill --- and play safe on the hill!*
- This program could be offered in partnerships with public health, community and family services or local businesses, etc.





# Build in Evaluation

Evaluation of the program should be conceived during its developmental stage, although it is conducted upon the delivery of the program. Here, how the program is affecting beliefs, attitudes and/or behaviors of the target audience is measured. The type of evaluation chosen depends upon available funds, time, level of support for evaluation, the data wanted, policies pertaining to the ability to gather information, and the overall program design.

## Types of evaluation

- |                                    |   |
|------------------------------------|---|
| <b><i>Formative evaluation</i></b> | - tests the strengths and weaknesses of materials to be used in the program by pre-testing them before implementing the program.  |
| <b><i>Process evaluation</i></b>   | - examines the steps taken to implement the program.  |
| <b><i>Outcome evaluation</i></b>   | - explores the changes in attitudes & knowledge of the target audience, gathers information about expressed intentions of the target audience and the impact for policy changes.        |
| <b><i>Impact evaluation</i></b>    | - focuses on the long-term outcomes of the program; measures changes in morbidity & mortality, long-term maintenance of behavior change, changes in absentee rates from work or school. |

## Methods to measure effectiveness:

- surveys
- tracking
- media audits





# Build in Evaluation

## Important questions to ask when choosing an evaluation method:

- What are the desired outcomes?
- How can these be measured?
- Is this available through another source or do we need to collect it?
- What are our constraints?
- How much funding is available to do this?
- What time frame are we working within?
- What are our capacities?
- What will we do with the results?

## Important questions to ask during the evaluation:

- Did we do the right things?
- Did we do the things right?
- Did we reach the target audience?
- Did we target the right people?
- What message did they receive?
- Did it fit their needs?
- Were there changes in attitudes or behaviors?
- Were they the changes we hoped for?





# Build in Evaluation

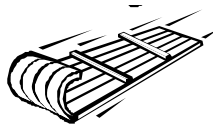
Practical Application Sample ...(cont'd)

## 1) Infant Car Seat Example



- Car seat inspections in the past show a large percentage of incorrect installations. These past numbers can be compared with inspections done following the one year program.
- Long-term, are these new learned behaviours continuing?
- A process evaluation looks at whether the target audience got the message;
  - did they participate in the program or decline (what %)?
  - did the message/slogan invite them to participate?
  - did they receive/read posters or info obtained at the hospital, doctor's office or clinic?

## 2) Tobogganing Example



- Are there less injuries - get emergency visit stats from local hospitals. Do teachers report a decrease in noted injuries and absenteeism?
- Do the children remember the program and the message? did the product (video, contest, etc.) work?
- Did the behaviour change on the hill? Watch. Ask.







# Implement the Plan

## You are ready to implement your plan once you have:

- set your objectives for the program,
- analyzed the target audience,
- assessed the marketing environment,
- defined program outcomes and timelines,
- developed the product and planned a strategy to deliver it, and
- built in an evaluation process.

## Important tips:

- Be prepared for unexpected opportunities and problems to arise. Make sure communication lines are clear and everyone knows who to contact if this occurs.
- Establish regular meetings or contacts during the campaign to monitor the process & keep everyone updated.
- Work closely with the partners you have brought into the initiative. Keep communication lines open with them. Treat volunteers as you do your partners.
- Assess the progress along the way & be ready to revise it if necessary.
- Observe timelines you set out, and keep an eye on the budget.

A good social marketing program is flexible and responds to the changing needs of the community. Document what was learned during and at the completion of the program to assist you or others who undertake a similar program in the future.

**KNOW YOUR AUDIENCE  
IDENTIFY YOUR PRODUCT  
DETERMINE THE PRICE  
FIND A PLACE  
&  
PROMOTE YOUR PRODUCT**





# Implement the Plan

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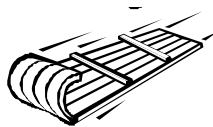
Practical Application Sample ...(cont'd)

## 1) Infant Car Seat Example



The local health authority decided to address the issue of incorrectly installed infant car seats by offering a presentation to new parents at their infant's 2 month immunization appointment. All nurses who worked in the clinic were given an in-service on installing infant car seats and two were assigned as key resource people in each office. A poster and brochure were developed and distributed to hospitals, doctor's offices and public health clinics to advertise the program. Parents were also informed of it when making the 2 month immunization appointment. The program was delivered over one year as planned. The following spring, city wide car inspections were to be done and the findings compared with previous results. A random survey was also planned for parents coming in to the clinic for their infants' 18 months immunization, to evaluate their perceptions of the program.

## 2) Tobogganing Example



After analyzing their information on the problem, a school parent-teacher group approached the injury issue by meeting children at the 'high accident' site at their school to get their safety ideas. After this, a two-week school blitz of posters, announcements and discussion groups with children were held to distribute 'Slide with Pride' awards (gold sticker seals) to be given *to* children *by* children. Through classroom role play, children were taught to honour safe sliders by placing an award sticker on them. Parents were informed of the program via their children and a newsletter. The program continued throughout the winter with analysis on a monthly basis. The flow of stickers never stopped - the incidents of serious injury did. Evaluating carryover safety effects for next winter will prove interesting.



# Evaluation of this Social Marketing Kit

Please fax this page back to Health Canada, Population Health  
Section at (780) 495-7842 (Edmonton)

1. Upon reviewing the tutorial, how useful did you find it?

NOT AT ALL      VERY LITTLE      SOME      MODERATE      A LOT

2. How easy to follow is this on-line format?

VERY      SOMEWHAT      TOOK A      EASY      VERY  
CONFUSING      CONFUSING      WHILE           EASY

3. Level of information provided was:

TOO BASIC      JUST WHAT I NEEDED      TOO MUCH

4. If you had a chance to use this information in a program you were designing, circle the sections you referred to the most:

Social Marketing	Set Outcomes & Timelines
Set Your Objectives	Plan A Strategy
Audience Analysis	Build In Evaluation
Assess Marketing Environment	Implement The Plan

5. What worked well? Why?

6. What would you change? Why? Please list your changes/examples.

***Please tell us about yourself:***

What is your level of experience in social marketing?

NONE      VERY LITTLE      SOME      MODERATE      ADVANCED

Would you recommend this site to others?      YES      NO

Why? \_\_\_\_\_

\_\_\_\_\_

Name:

Organization:

Address:

Title:

**Thank you for your comments**



Health Canada      Santé  
Canada      Canada

## References

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