

Social Marketing Basics

This module describes the basic terms and concepts used in the social marketing planning process. On average, it takes people 30-35 minutes to complete this module. The time you need will depend on your pace and how much you explore the resources and supplemental materials.

- Learning Objectives
- Scenario 1
- What is Social Marketing?
- When Should You Use Social Marketing?
- Why Should You Use Social Marketing?
- Scenario 2
- Definitions of Key Terms
- What Makes Social Marketing Different?
 - Audience Orientation
 - Audience Segmentation
 - Scenario 3
 - Influencing Behavior
 - Competition
 - Exchange
 - Scenario 4
 - Marketing Mix
 - Scenario 5
 - Looking Ahead
- Social Marketing Planning Process
 - Six Phases
 - Expectations for Planning
 - Main Components of a Social Marketing Plan
 - Planning Questions
- Scenario 6
- Summary
- Check Your Knowledge

Social Marketing for Nutrition and Physical Activity Web Course: Introduction

www.cdc.gov/nccdphp/dnpa/socialmarketing/training



Learning Objectives

After completing this module, you will be able to

- Define social marketing and describe what it is and what it is not.
- Describe when and why to use social marketing.
- Identify and define key terms associated with social marketing.
- Describe how social marketing is different from traditional health promotion planning.
- List and define the four P's in the marketing mix.
- List the six phases in the social marketing planning process.
- Identify four components of a social marketing plan.

Scenario 1

As you move through the course, you'll be able to apply your new knowledge by helping a fictional program planner create her own social marketing intervention. Rosa is a program planner for the Nutrition and Physical Activity branch of the Heartland State Health Department. She was trained as a dietician.

Meet Rosa



Rosa: "Hello! I'm so glad you'll be giving me some feedback on the community intervention we've been trying to put together.

Last year's application for grant money was turned down. The reviewers said they were having a hard time seeing the link between the intervention we proposed and the needs in our community. They did encourage us to reapply again this year, though.

I have been talking to Dan Cummings, a program planner in a neighboring state whose application was approved. He's been using a process called social marketing."



Dan: "The social marketing planning process really helped us deliver a better intervention, and I think it could have been one of the reasons our proposal was approved. I'd love to help you get started or answer any questions you have along the way."



Rosa: "I'm definitely going to have lots of questions. I've been working in public health for over fifteen years, and I've heard about social marketing but I've never been trained in how to do it. I'm glad I'm going to have you and Dan to help me clarify things along the way. Let's get started."

What is Social Marketing?

One well-known definition of social marketing is "the application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programs designed to influence voluntary behavior of target audiences in order to improve their personal welfare and that of society."¹

Note the following key points in this definition. Social marketing

- Uses **commercial marketing** strategies.
- Involves influencing **voluntary** (not forced or coerced) **behavior change** (not just increased awareness or increased knowledge).
- Promotes an end goal of **improved personal welfare** and **improved welfare of society**.

Social marketing can be thought about as a

- Systematic and strategic planning process.
- Social or behavior change strategy.
- Mindset for addressing problems.
- Total package of strategies carefully chosen based on characteristics of the target audience.

In this course, social marketing is presented as a systematic and strategic planning process that results in an intervention or program.

Social marketing is **NOT**²

- Just advertising or communication.
- A media campaign.
- Reaching everyone.
- A fast process.
- A theory.

Resources³

CDCynergy: Social Marketing Edition's Primer for Managers describes how social marketing is different from traditional planning approaches in each of the phases.

¹ Alan Andreasen, *Marketing Social Change: Changing Behavior to Promote Health, Social Development, and the Environment*, p. 7

² Adapted from: Turning Point's *The Basics of Social Marketing*

³ Resources that are not hyperlinked can be found at:

<http://www.cdc.gov/nccdphp/dnpa/socialmarketing/training/resources.htm>

When Should You Use Social Marketing?

While social marketing principles can be used in any planning process, they are most helpful when used from the start in planning. Social marketing should be used when voluntary behavior change is your goal and you desire an audience-focused program. Also, you must have the time and skills to adhere to the process.

You would not use social marketing if you were only trying to educate or raise awareness. Although, if the hope is that education or awareness will lead to behavior change, then social marketing would be appropriate.

Many people assume that social marketing is a resource intensive process and that you must have a large budget and many people. This can be true, but it is also possible to use social marketing with limited resources. There are certain modifications that can be made when you have limited resources, and those ideas will be shared as you move through the course. If you have limited resources or are working with a very small group of people, you can still use the social marketing mindset (thinking about problems and issues from the standpoint of the person who needs to change) for no cost, even if you are not able to complete the steps in the social marketing planning process.

The concepts of social marketing can also be used to make "upstream" changes, such as environmental or policy changes.

This can get confusing because the end beneficiary of a particular environmental or policy change isn't always the person who needs to make the behavior change. For example, you could be trying to get a school board to adopt a specific policy. The beneficiary of such a policy would be the children in the school system. In this case, the school board is the target audience and the behavior change is adopting the policy.

Environmental and policy changes can be the primary goal of your program, or they can be used with activities designed for the end user. If your program includes environmental/policy level changes and individual level changes, you will likely have two separate target audiences and two different behavior changes.

As you read about the basic principles of social marketing, think about all the possible "individuals" you might influence, and how influencing the behavior of some individuals would contribute to environmental and policy changes for your state or community.

Resources⁴

- Article: *Marketing Social Marketing in the Social Change Marketplace* has more information on when social marketing is an appropriate approach to take.
- Book: *Social Marketing in the 21st Century*

⁴ Resources that are not hyperlinked can be found at:
<http://www.cdc.gov/nccdphp/dnpa/socialmarketing/training/resources.htm>

- Book: *Media Advocacy and Public Health*
This is where the term "upstream" originates.
- Book: *Social Marketing: Principles and Practice*
See chapter 3 for a discussion of social marketing and environmental changes.

Program planners and other public health professionals who have seen social marketing work firsthand share their thoughts:

"Social marketing is time well spent...it is an investment that in return, allows you to more effectively assist the population that you are trying to change."

Amy Meinen, Nutrition Coordinator, WI

"Because social marketing is based in a strong strategic planning process, and because of its insistence that you understand your audience, it really can give you a 360 degree view of both the causes of a problem and potential solutions. Even if your organization cannot address all of the causes, at least you can make an informed decision on which solutions are within your purview, and which will most 'move the needle' on behavior change."

Mike Newton-Ward, Social Marketing Consultant, NC

"The key reason I recommend using social marketing is to understand the audience you are trying to reach. Without that understanding of what their motivations and needs are, any effort to reach them will fall flat."

Sheree Vodicka, Healthy Weight Communications Coordinator, NC

"Use social marketing because it works; nothing else does. Public health has been ineffective at creating the behavior changes we seek because we have been telling people what we think they need to know. Social marketing asks people what it would take to create the changes."

Wendy Carlin, Program Coordinator, KY

Scenario 2



Rosa: "The idea of social marketing sounds really good but I still am not sure how to get buy-in from my boss, Dr. Richards, to let me use this process to plan an intervention. We're short-staffed and I'm already doing the work of two people! I'm pretty sure he doesn't want me to spend all my time on this one project. It seems like he just wants me to rewrite our proposal and see if we can get the federal money. We may be able to get a graduate intern from Wellington University to help us, and I can probably use a little money from our block grant, but our budget is still pretty slim.

I have a meeting scheduled with Dr. Richards tomorrow to talk about this project, and I've got to be prepared to counter his objections.

What should I say?"

What should you advise Rosa to say? Check all that apply.

1. Explain how you feel social marketing is an appropriate planning process to use because of its effectiveness and because you want the program you develop to be audience-focused. Try giving Dr. Richards some examples of programs that have used social marketing and gotten positive evaluations.
2. Explain how social marketing results in voluntary behavior change of the target population. Time for strategic planning will be required but seeing behavior change will justify the time spent.
3. Explain the budget implications of using social marketing, since Dr. Richards will probably be interested in those. Tell him that you can't get started without any funds to use.
4. Explain that you'll need to have some staff time to develop a social marketing plan. See if he will approve your planning time before trying to reapply for funding.

Feedback:

1. This would be **good advice**. Showing that social marketing can be effective is an important selling point. Also, an effective program could lead to additional funding.
2. This would be **good advice**. Instead of increasing knowledge or awareness, social marketing attempts to change behavior, which has more of an effect on the health status of the target audience.
3. This would be **poor advice**. Social marketing can still be used effectively on a small budget. And, much of the work in early phases requires staff time and work, not necessarily a budget to get started.
4. This would be **good advice**. If Dr. Richards will allow you to spend some additional time planning this program, the program will likely have better results.

Definitions of Key Terms⁵

Throughout this course you will frequently encounter certain key terms used in social marketing. Review the following definitions to familiarize yourself with these terms:

Primary target audience:

Also called target audiences, a group of individuals whose behavior needs to change to positively impact the problem. They could be directly affected by the problem themselves, or those who can make policy or environmental changes (i.e., voting behavior, approval of policies).

Secondary audience:

A group of individuals who exert influence on the primary target audience's behavior.

Formative research⁶:

Research conducted during the development of your program to help you choose and describe a target audience, understand the factors which influence their behavior, and determine best ways to reach them. Also called formative assessment, market research, consumer research, or audience research.

Behavioral objective:

A written description of the aim or goal you have for the specific behavior you want the target audience to take. It should be a clear, specific, measurable, and feasible action.

Intervention strategy:

A guiding plan of action for the social marketing program. The intervention strategy (also called market strategy) encompasses

- Specific target audience segment(s).
- Specific behavior change goal.
- Benefits of the desired behavior to promote.
- Costs and barriers to behavior change that will be minimized.
- The marketing mix (product, price, place, and promotion).
- Activities that will influence or support behavior change.

A complete list of terms and their definitions can be found in the glossary.

Primary vs. Secondary Audiences

The topic of who is a primary audience and who is a secondary audience can be a source of confusion. The important point is to determine whose behavior change will be your central focus, and, therefore, who you will need to conduct formative research with to understand potential intervention components and strategies.

⁵ Definitions adapted from *CDCynergy: Social Marketing Edition*.

⁶ The terms formative research and formative assessment refer to the same process. The purpose of both is not to conduct generalizable research, but to gather information to inform program planning.

For example, if you wanted children to get more physical activity by walking to school each day, children would be your primary audience. They need to change their behavior to impact the problem (lack of physical activity). But, the majority of your program activities may be designed to intervene with parents who play a significant role in influencing the behavior of their children.

Even though, in this situation, parents are a secondary audience because of their influence on children, you may need to think of them as another **primary** audience because their behavior needs to change to support behavior change in their children. Regardless of how you choose to categorize them, you'd need to conduct formative research with parents because they will require unique strategies in your intervention design.

Sometimes, the groups that you are working with are more distant from the individuals who are affected by the health problem. For example, you could be trying to get city council members to approve funds for construction of sidewalks. The end goal is still getting children to walk to school, but in this case, the city council members would be your primary audience. You are trying to change their voting behavior. Secondary audiences in this situation would be people who influence the city council members, such as parents, school board members, or the media. You would probably want to conduct formative research with (and develop intervention strategies for) both the city council members and an influencing audience.

You can sometimes get frustrated thinking about who influences whom, and who needs to act. If that happens, take a step back. What's important is that you know what audiences you need to understand to design the best program to support behavior change.

What Makes Social Marketing Different?

The next few pages describe several elements of social marketing. Many of these elements are borrowed from the field of commercial marketing.

- Audience orientation.
- Audience segmentation.
- Influencing behavior.
- Competition.
- Exchange.
- Marketing mix.

Addressing these elements collectively is what makes social marketing different from other public health planning approaches. They are each briefly described on the following pages to provide an overview. More depth about each topic follows in each of the phases.

Resources⁷

If you'd like additional information, you could start with the following resources on the basics of social marketing

- [The Basics of Social Marketing](#) (PDF-1Mb)
- Article: *Social Marketing in Public Health*
- Book: *Marketing Social Change*
- Book: *Social Marketing: Influencing Behaviors for Good*
- [National Social Marketing Center](#)
United Kingdom

⁷ Resources that are not hyperlinked can be found at:
<http://www.cdc.gov/nccdphp/dnpa/socialmarketing/training/resources.htm>

What Makes Social Marketing Different?

Audience Orientation

Social marketing planners take time to learn what the target audience currently knows, believes, and does. All decisions are made with the audience's perspective in mind. The program is designed to fulfill the audience's needs and wants.

You may already know a lot about your audience and have some ideas about the program's activities. It can be tempting to start planning based on these ideas, but social marketing requires that you test those assumptions with the target audience first. You may be right, but you may also be surprised at what your audience thinks and says.

Tip

Sometimes people equate formative research or focus groups with social marketing. Understanding the target audience is a crucial part of social marketing, but is not sufficient on its own. It is good practice in any planning process.

Example

Program planners in Michigan created an intervention for young women in African-American churches to increase physical activity and healthy eating habits. They originally thought that their target audience would find personalized phone calls motivating, and planned to incorporate them into the intervention. However, the target audience did not respond to that idea at all when asked about it in focus groups. As a result, the program planners chose to use other activities the women found motivating.

What Makes Social Marketing Different?

Audience Segmentation

Audience segmentation is the process of dividing a broad target audience into more homogeneous subgroups, called audience segments. The purpose of dividing up an audience into segments is to make your program more effective and to use your resources wisely.

A program developed for the "general public" will likely not be really effective for any one person or group. But, by tailoring your efforts to a particular segment, you can greatly improve your effectiveness because you can use the programming, communication channels, and messages that are most relevant to your segment. This way, they are more likely to be reached and more likely to pay attention, creating a more effective program.

For example, completely different programs would be designed for these two segments:

1. Overweight adults who do not enjoy physical activity and are not motivated to participate in it.
(The program for this segment would need to address the target audience's motivation before behavior change can be expected.)
2. Overweight adults who like physical activity and are motivated to do it, but can't find the time during the day to participate in it.
(The program for this segment would need to address the target audience's perception of the barrier of lack of time.)

Resources

- [Segmenting Audiences to Promote Energy Balance: A Resource Guide for Public Health Professionals](#)

Scenario 3



Rosa: "After I talked to Dr. Richards, he seemed okay with giving one of my current projects to someone else so I could spend some time on social marketing. But, while I was explaining some of the key elements of social marketing to him, he had some concerns about a few big pieces of this approach to planning."



Dr. Richards: "That audience orientation piece seems like a waste of time to me. We've been working in these areas statewide for a long time and we have a pretty good idea about what people are doing (or not doing) when it comes to eating healthy and getting physical activity. And why should we target segments? I don't think it's a good idea to leave people out of any kind of intervention that we plan. Shouldn't we be trying to reach as many people as we can?"



Rosa: "I'm losing my confidence! How do you think I can convince him of the need to understand our target audience and segment them? Or do you think it is okay for me to concede on a couple of these points?"

What should you advise Rosa to say? Check all that apply.

1. It is okay to agree with Dr. Richards about your existing audience information and forego further research. You know what's best for them, right? More research won't be necessary.
2. You do have thorough and long-term behavioral information about what state residents do, but you don't yet know why they do it. Finding out what an audience knows and believes about these behaviors will help you build a successful program that fulfills audience wants and needs.
3. You may reach more people by targeting everyone, but you're less likely to get the results you want because not everyone will respond similarly to your program, not everyone is ready to change at the same time, nor do the same things motivate everyone. A program is more likely to be effective if it is tailored to a particular homogeneous subgroup of the audience.
4. It sounds like Dr. Richards is interested in and would support reaching a broader audience. If he will back it financially, you should go for it.

Feedback:

1. This would be **poor advice**. While Rosa's department may have a lot of information about the population's behaviors, they don't have any information about what specific audience groups know and believe. A successful program must be built around the audience's needs and wants, not the expert's.
2. This would be **good advice**. It's crucial to test the 'why' assumptions with your target audience before you start planning.
3. This would be **good advice**. The more specific you can get with your audience, the more likely your program will address their particular needs (and therefore help to change their behaviors).
4. This would be **poor advice**. Even with more money to reach a broader audience, you're still less likely to be successful than if you target your program to a specific group. Trying to blanket a large population with the same message is not likely to be effective.

What Makes Social Marketing Different?

Influencing Behavior

Influencing behavior (not just awareness or knowledge) is the bottom line of any social marketing program. Therefore, your program's goals should be designed to influence behavior instead of only increasing knowledge or awareness of a problem. You may want your target audience to adopt a new behavior, stop a current behavior, or refrain from starting a new behavior.

To do this, you need to understand

- Current behaviors of your audience.
- Ideal behaviors.
- Reasonable steps to move the audience from the current behavior towards the ideal behavior.
- What determines their behavior.

The initial behavior change you ask for may not be to adopt the ideal behavior. The audience may need to start with smaller changes that move them towards the ideal behavior.

The end point is always action. Ask yourself: What do we want the target audience to do as a result of our intervention?

Example

Current behavior of the target audience: Watches approximately 5 hours of television per day

Recommended behavior: Watching two or fewer hours of television per day

Possible behavior change: Reduce television viewing by one hour-long TV show per day (an intermediate behavior change that will move the audience towards the ideal behavior).

What Makes Social Marketing Different?

Competition

Social marketing, like commercial marketing, takes place in a competitive environment.

Competition is defined as the "behaviors and related benefits that the target audience is accustomed to—or may prefer—to the behavior you are promoting."⁸

The target audience is doing something instead of the behavior you want them to do. Why does the audience prefer the competing behavior over the behavior you want to promote? Does the environment support your behavior or the competition? In social marketing programs, competition should be acknowledged, explored, and addressed by the strategies of the program.

Example

Possible competing activities for physical activity in tweens—

- Watching TV
- Playing on the computer
- Talking on the phone
- Going to the mall/shopping
- Spending time with friends
- Doing homework
- Participating in after-school programs

⁸ Turning Point Social Marketing National Excellence Collaborative. *The Basics of Social Marketing: How to Use Social Marketing to Change Behavior*.

What Makes Social Marketing Different?

Exchange

For every choice we make, there is an exchange that occurs: we give one thing up in return for something else. In the commercial marketing world, this exchange can be tangible (pay an extra quarter and get more fries), or it can be intangible (buy a brand-name pair of shoes and get the image that goes with the brand). While the exchange can be tangible in social marketing (paying a higher price for a healthier vending machine option), the exchange is often intangible, such as giving up a TV show to go for a walk to improve one's health.

The target audience will compare the costs and benefits of performing a behavior before choosing to adopt it. You must determine what your target audience values and what costs they perceive to create an exchange that persuades them to adopt your behavior over the competition. The exchange should increase the perceived benefits of *the target behavior* and minimize its costs. Or it could increase the perceived costs of *the competing behaviors* and minimize their benefits.

Example

Proposed Exchange: Audience will give up time and effort to prepare fruits and vegetables as snacks to replace higher calorie snacks. In return, they may lose weight and gain peace of mind knowing they are doing something to prevent future chronic diseases.

Note: This exchange works with an audience whose members are primarily concerned with weight, health, and disease prevention. It would not work as well with an audience that is already of a healthy weight or not as concerned with the long-term health consequences of their diet.

Scenario 4



Rosa: "I thought I convinced Dr. Richards about the importance of learning more about our specific audience but he still had concerns with the idea of encouraging small behavior changes instead of the gold standard."



Dr. Richards: "I don't understand why so much emphasis is being put on small behavior changes, like eating one more cup of vegetables. Don't we want everyone to be meeting our recommendations? Why should we put all our time and effort into changes that won't even get us to that point? With that same amount of man-hours and money, we could mail brochures about obesity prevention to every state household."



Rosa: "This is hard! He doesn't seem to understand the steps needed for behavior change. What should I say to help explain this concept?"

What should you advise Rosa to say? Check all that apply.

1. You're right, Dr. Richards. We should always aim for the gold standard of behaviors and not let people think that making small changes is good enough.
2. Specific behavioral changes are good, but I agree with you, maybe we should give the audience an entire plan of action, not just one new behavior at a time.
3. It's true. We would be investing time and money into getting an audience to take a small step in the right direction, but the alternative is spending money and not even asking for behavior change. That doesn't seem worthwhile.
4. There is a body of literature and evidence in behavioral theories that acknowledge that behavior change takes place incrementally. By allowing people to make small steps in the right direction, we're accommodating their needs.

Feedback:

1. This would be **poor advice**. People can be overwhelmed if asked to make changes that are not feasible for them. Asking them to do the gold standard might turn them off altogether.
2. This would be **poor advice**. While behavioral change is the first—and ultimate—goal, it is most likely to be achieved step-by-step through smaller, incremental goals.
3. This would be **good advice**. A readily achieved result will give your audience positive reinforcement and put you in a position to make more changes that will eventually lead to the ultimate health goal.
4. This would be **good advice**. By appealing to literature and evidence, you have a stronger case for supporting small behavior changes.

What Makes Social Marketing Different?

Marketing Mix

The marketing mix, also known as the "4 P's," is made up of four parts that, together, create the exchange offered to the target audience

- **Product:** What the audience gets or what you offer; can be tangible items, intangible benefits, or the behavior itself.
- **Price:** What the audience gives up to get a tangible product; also the costs or barriers to making the desired behavior change.
- **Place:** Where the audience is located or gathers, performs the desired behavior, accesses products/services, or is thinking or hearing about the health issue.
- **Promotion:** Messages, materials, channels (path used to reach the target audience), and activities to promote behavior change and describe the product, price, and place features of the program.⁹

Each of these 4 "P's" is explained in more detail in the next few pages of this module. All of the 4 P's are interrelated and somewhat overlapping. If you change one, it is likely to have implications for the rest.

Resources¹⁰

- Book: *Marketing Public Health: Strategies to Promote Social Change*
Pages 206-215 of this book include a discussion on the marketing mix in both individual and environmental/policy changes.

Product

In social marketing, the product usually refers to the desired behavior and all of the benefits, services, and tangible items that lead the target audience to adopt the desired behavior.

Kotler and Lee speak of three levels of a social marketing product.¹¹ The "core product" or innermost level is made up of the benefits of the desired behavior, the "actual product" is the behavior itself, and the "augmented product" contains any objects or services created to support behavior change.

For example, the behavior of eating fruits and vegetables would be the actual product, the fruits and vegetables themselves and a new farmer's market that sells fruits and vegetables would be augmented products. Whatever the product, you will use formative research to learn from the audience what will make it appealing to them.

⁹ Definitions adapted from *CDCynergy: Social Marketing Edition*

¹⁰ Resources that are not hyperlinked can be found at:

<http://www.cdc.gov/nccdphp/dnpa/socialmarketing/training/resources.htm>

¹¹ Kotler P, and Lee N. *Social Marketing: Influencing Behaviors for Good*. (3rd edition)

Example



The product is physical activity and all the benefits that tweens truly want: having fun, being with friends, being cool, and trying new skills. Long-term health benefits are not motivating to tweens at this time in their lives and therefore are not part of the product.¹²

Price

The price is the cost or barriers to adopting the behavior. The price for social marketing products is not always monetary, but can include barriers such as loss of time, decrease in pleasure, loss of self-esteem, loss of respect from peers, lack of access, or embarrassment. Once the costs or barriers of the desired behavior are identified, social marketing attempts to minimize or reduce them. If that's not possible, you may be able to increase the costs of the competing behavior by making it more difficult or less appealing.

Even if you cannot change the actual costs of a behavior, you still may be able to affect your audience's perception of those costs. For example, if someone believes that cooking fruits and vegetables is very difficult to do, you may not be able to make cooking them any less difficult, but you may be able to change the audience's perception of the difficulty by offering recipes, tips, and training.

Example



Psychological and social costs of physical activity for tweens include embarrassment and fear of being teased or ridiculed. Other costs include loss of time that could be spent doing something else (i.e., playing video games or talking on the phone) or financial costs, such as those associated with sports teams or organized classes.¹³

Place

The concept of "place" includes both where and when the audience

- Performs the desired behavior.
- Is located or gathers.
- Accesses products or services.
- Thinks or hears about the health issue or behavior.

Placement strategies can include offering services or materials in locations that are convenient and pleasant, or placing information where and when your audience is already thinking about the

¹² From CDC's VERB™ campaign (a national campaign designed to influence tweens aged 9—13 to be physically active every day).

¹³ From CDC's VERB™ campaign

behavior (or about the competing behaviors). Other placement strategies could make the behavior more accessible, such as increasing the number of clean, safe parks in a neighborhood or opening up school sports facilities to the community after school hours.

Example



Place included locations where tweens can be physically active including specifics like when they are open, how tweens get there, how welcoming, comfortable and safe they are.¹⁴

Promotion

Promotion includes communication or education that describes the program's benefits, product, price, and place.

It includes

- Messages.
- Materials.
- Channels.
- Incentives.
- Activities.

You won't always need mass communications or paid advertising. Peer-to-peer communications, small group interactions, mentoring, and other methods of promotion can be just as effective, if not more so. You may also use media advocacy techniques like writing letters to the editor, or developing relationships with the press to promote your messages.

Consider

- Where and when your audience will attend to the message.
- What incentives you might offer to participants.
- Who should deliver the message.

Example



Promotion included consistent, persistent and targeted communications using a variety of channels (paid advertising, public relations, printed materials, promotional items, signage, special events, video showings, local celebrity involvement, and Web sites). Messages and materials for parents are kept separate from communications to tweens.¹⁵

¹⁴ From CDC's VERB™ campaign

¹⁵ From CDC's VERB™ campaign; For more information on the VERB campaign, including a discussion of the 4 P's see [VERB™ — a social marketing campaign to increase physical activity among youth.](#)

Scenario 5



Rosa: "I explained the 4 P's approach for the intervention to Dr. Richards but he's still thinking about this from the expert-driven perspective."



Dr. Richards: "How do we know this approach will work? You're not putting enough emphasis on long-term health benefits. People in our state must not understand the health benefits to doing all these behaviors; otherwise, they'd be doing them, right?"



Rosa: "Any ideas for a good response?"

What should you advise Rosa to say? Check all that apply.

1. You're right, Dr. Richards. With just a little more time and effort, we can give a lot more people the information they need to make the right decisions.
2. You've got a point, Dr. Richards. Long-term health benefits are the ultimate goal of a social marketing program and we should promote them in our messages, no matter who our audience is.
3. Although we as health professionals may care greatly about long term health benefits, our target audiences may not. We need to figure out which benefits matter most to the audience before we decide which to promote.

Feedback:

1. This would be **poor advice**. Just communicating all the facts **may** expose more people to the information, but it won't achieve the desired results.
2. This would be **poor advice**. You don't know whether the audience cares about these benefits or not. You should promote the benefits that they care about, not the ones that you are most concerned about.
3. This would be **good advice**. Using an audience mindset to identify benefits to promote is a sign that you're thinking like a social marketer!

What Makes Social Marketing Different?

Looking Ahead

We've discussed the following elements

- Audience orientation.
- Audience segmentation.
- Behavior change.
- Competition.
- Exchange.
- Marketing mix.

There are the pieces of social marketing that, when integrated, form a social marketing program. Again, it's the collective use of these elements that make a social marketing program. The next topic, the social marketing planning process, describes the phases involved in a social marketing approach to planning a program. Each of these phases is then described in-depth during the next six modules of this course.

Social Marketing Planning Process

The social marketing planning process is a structured approach to developing and implementing a program or intervention for voluntary behavior change. The planning process used in this training consists of six phases.

Six Phases

1. Problem description.
2. Formative research.
3. Strategy development.
4. Intervention design.
5. Evaluation.
6. Implementation.

The first five phases of the social marketing planning process take you through the design and creation of a plan for an intervention or program and its evaluation. The sixth phase describes the plan's execution and the implementation of the intervention.

Expectations for Planning

Because social marketing is shown in numbered phases, it may seem like a straightforward and linear process. In practice, however, the process is more circular and iterative.

At times you may need to revisit an earlier step, or jump ahead to complete the step that you are on. You may have to revise or modify your plans based on information you've gathered. It's easy to get discouraged; but, this revision of plans happens to everyone and is a sign that you are keeping your audience at the center of your decisions. Revising and refining your decisions is completely normal. Every so often, we'll remind you of this point with a "Big Picture" box in places where you may want to strategically look ahead or backwards before making decisions.

"The model itself is laid out in sequential phases and steps that allow the user to proceed through them in an orderly fashion, but the process itself is never really sequential as most planners know. In fact, it's more of an iterative process where in planning you move from forward and backwards sometimes to revisit earlier decisions. So the suggestion that we have for users is to remember that even though the process itself is laid out sequentially and simply, it does try to capture a very complex process and, in that sense, it doesn't really lend itself to moving in one direction only..."

Christopher Cooke, CDCynergy video segment

You begin the process by making fairly broad decisions. As you gather more information, you will focus and refine those decisions. At the end you will have:

- A specific target audience
- A specific behavior you want the audience to adopt
- Specific strategies to promote that behavior

All of these decisions are based on what you know and learn about your audience.





Like any good planning process, social marketing takes some time and energy. Assembling a team of people with a variety of skills and knowledge can provide additional resources and support as you move forward. People with skills in the following areas can be very helpful:

- Research design and analysis
- Epidemiology
- Behavioral theory
- Program planning
- Evaluation

Also, you may want to include people with knowledge of your target audience, your community, and the topics you plan to address (i.e., nutrition, physical activity).

Main Components of a Social Marketing Plan

Throughout the social marketing planning process, several concepts reoccur in many of the phases. The plan components, as they are called here, are the problem/health issue, target audience, behavior, and strategy for change. As you proceed through the phases of the planning process, you will revisit these components and make decisions about each, gradually becoming more and more specific as you move forward.

	Plan Component	Questions to Ask and Answer
	I. Problem/health issue	What is the problem we need to address?
	II. Target audience	Who is affected by the problem and how can they be reached?
	III. Behavior	What do we want the audience to do?
	IV. Strategies for change	How can we get the target audience to adopt the desired behavior(s)?

Planning Questions

Learning to ask the right questions is a significant part of social marketing planning. The Planning Questions document is a checklist of questions organized by the four plan components. You can reference these questions as you work through the phases of developing a social marketing plan.

You can download the [Planning Questions](#) (PDF-88k) and print for easy reference.

Scenario 6



Rosa: "Eventually, with some examples of successful social marketing efforts from Dan, Dr. Richards is open to letting me try using the social marketing planning process for designing an intervention to resubmit for the grant funding.

I've got the go ahead for spending half my time on this project until we resubmit, and if I'm lucky, I'll be able to have a small budget to go along with it!"

Summary

You should now be able to

- Define social marketing and describe what it is and what it is not.
- Describe when and why to use social marketing.
- Identify and define key terms associated with social marketing.
- Describe how social marketing is different from traditional health promotion planning.
- List and define the 4 P's in the marketing mix.
- List the six phases in the social marketing planning process.
- Identify four components of a social marketing plan.

Because this information will be important as you work through the remaining course modules, some review questions are included here to help you make sure you've mastered the content presented in this module.

Check Your Knowledge

The following questions are provided to help you review the content presented in the Basics of Social Marketing module.

- 1. Key terms in social marketing include the following. Check all that apply.**
 - a. Qualitative analysis
 - b. Formative research
 - c. Media advocacy
 - d. Target audience

- 2. Which of the following would be the best definition of social marketing?**
 - a. Social Marketing is the use of cognitive behavioral theory to encourage a target audience to change their behavior.
 - b. Social Marketing is a strategy for influencing social behaviors to benefit communities.
 - c. Social Marketing is the application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programs designed to influence voluntary behavior of target audiences in order to improve their personal welfare and that of society.
 - d. Social Marketing is the active promotion of products, which, if used, will improve society.

- 3. The following combined elements are what make social marketing different from other strategies used to develop interventions:**
 - Audience orientation
 - Audience segmentation
 - Influencing behavior change
 - Competition
 - Exchange
 - Marketing Mix
 - a. True
 - b. False

- 4. The marketing mix is another way of discussing the 4 P's. Select the correct word to match the definition.**

a. How to influence the audience to adopt the behavior	Product
b. Where the audience gets or thinks about the behavior	Price
c. What the audience gives up, barriers to adoption	Place
d. What the audience gets; what you're trying to sell	Promotion

- 5. How are social marketing plan components different from the six phases?**

- a. Plan components aren't different. The plan components are the same as the first four phases.
 - b. Plan components are concepts which reoccur throughout the phases of the social marketing planning process.
 - c. Plan components refer to parts of a specific program whereas phases refer to the overall process used in social marketing.
 - d. None of the above is correct.
- 6. The Planning Questions document is a list of questions that can be referenced in various phases of the social marketing process.**
- a. True
 - b. False

Answers:

- 1. B, D
- 2. C
- 3. a. True
- 4. a = promotion; b = place; c = price; d = product
- 5. B
- 6. a. True