Conducting a Social Marketing Campaign
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Why should you use a social marketing approach?
When should you run a social marketing campaign?
How do you manage a social marketing campaign?

"I'm not a doctor," runs the joke. "I just play one on T.V." Television and other forms of mass media, it seems, are often highly adept at making complicated tasks look simple.

This is especially true when it comes to marketing. A thirty-second ad for toothpaste will seem incredibly simple, even a bit silly--yet we'll find ourselves humming the jingle in the car on the way home. When we stop by the grocery store a week later, we might pick up that toothpaste, caught by its colorful box and placement on the shelves. We've been grabbed by a successful marketing campaign. It might seem so simple, we're barely aware of it--but it really represents a huge amount of research, design, and testing done by the toothpaste corporation.

Social marketing is based on the same principles used to sell that tube of toothpaste. It means to use commercial marketing techniques to try and improve social problems. A social marketing campaign might be used, for example, to try to reduce violence against women, or to increase the number of people who sign up as donors for the national bone marrow registry.

Managing a social marketing campaign might look fairly simple--like you're just putting up more posters to raise awareness of the lead poisoning problem in your community, for example. In reality, however, it's much more than that. Social marketing is no less than a shift in how you view and run your program or organization. It can be a very effective approach, but it's one with many details to consider.

On the following few screens, we'll try to make concrete how you can accomplish many of these details. We'll start by touching briefly on the importance of social marketing and when might be a sensible time for your group to draw up a social marketing campaign. Then, we'll dive into the details of how to manage a social marketing program. We'll include how to separate consumers into individual groups and how to find out what those groups want (and how you can give it to them). Then, we'll discuss designing the message, choosing the medium, and finally, implementing and evaluating your work.

If you are unfamiliar with the concept of social marketing, please consider reading Chapter 45, Section 1: Understanding Social Marketing: Encouraging Adoption and Use of Valued Products and Practices, before reading this section.

Why should you use a social marketing approach?

Social marketing is an approach with a lot of advantages. Perhaps the two most pointed benefits are:

- It helps you reach your target audience. Social marketing makes you look at whom you want to influence, and how to sway these people most effectively. And, for this reason,

- It works. If the creative, thorough marketing has helped numerous companies make millions of dollars, there is no reason, that well run social marketing campaigns can't be even more effective, in changing people's behavior. After all, the benefits of good health (or a clean environment, or an end to date rape) are surely more evident than the benefits of a pair of running shoes.
When should you run a social marketing campaign?

So when is the proper time to run a social marketing campaign? It will depend quite a bit on your program or organization, of course, but generally speaking...

**When you are trying to change the behavior of a large number of people.** If the number of people who you are trying to reach is small enough that they can be spoken with individually, or in a group, the time is probably not ripe for social marketing. For example, if you are interested in asking students at Pleasant Valley High School to volunteer at the upcoming spring fair, you might speak to them at an assembly, or visit individual classrooms. Development of a social marketing plan is more than is necessary. If, however, you want to increase volunteerism among everyone who lives in Pleasant Valley, a social marketing plan might be just what’s called for.

**When you are trying to change behavior over a long period of time.** Social marketing plans tend to be for long-term projects, when you are trying to change people’s behavior permanently, or over a long period of time. Generally speaking, if you are asking people to perform a particular action once, efforts to convince them to do so wouldn’t use a social marketing campaign. This is a bit tricky, because some of the same principles might be used; or such an action might be a part of a social marketing campaign. For example, asking people to give blood once at their office wouldn’t be social marketing. However, a concerted effort by the blood bank to try to increase the number of people who donate blood regularly might use office blood drives as a part of the campaign. That effort as a whole might be a social marketing campaign, provided it used the marketing principles we have talked about.

**When you have the resources necessary to manage a comprehensive effort.** As we’ve seen in the previous two bullets, running a social marketing campaign is not a short-term idea. It’s more of a philosophy that will direct how you approach your work as a whole. Therefore, a social marketing campaign should only be undertaken when you’re ready to use the time and resources it will take to make that shift.

- This doesn’t mean your organization or program has to have a lot of money to use a social marketing approach. Excellent social marketing can be done on a shoestring budget, if people are excited and willing to put a lot of effort into making it work.

How do you manage a social marketing campaign?

The management of a social marketing campaign is comprised of four major parts, which can each be broken down in turn:

- Defining and understanding: the problem, your goals, your target audience, and what they think about the problem
- Choosing strategies: Brainstorming possible strategies, choosing those which are most appropriate, designing messages, and pretesting your ideas
- Implementing and evaluating your work
- Do it all over forever

Let’s look at each of these more closely.
Defining and understanding: the problem, your goals, your target audience, and what they think about the problem

1. Define the problem. This is the first step of your social marketing campaign. The problem is probably something you already understand, or you wouldn't be considering such a campaign to begin with. Whether it is child hunger or environmental abuses, you know what you've set out to solve.

Articulate the problem

What is not as certain is that you have articulated that problem, or that it has been written down and is understood in the same manner by all members of the group. If you haven't done so, now is the right time to work together and get it done. That way, everyone is starting the work from the same place, and future misunderstandings can be avoided.

Define the problem broadly

When defining the problem, be sure to do so broadly, without suggesting possible solutions. For example, your problem might be defined as, "Too many students drop out of school in our community," instead of "We need to improve teacher training so students will stay in school." Or, "Many women are physically and/or emotionally abused by their partners," instead of, "We need to build more women's shelters." By defining the problem more widely, the group remains open to more solutions, improving chances you will be able to solve the problem.

For more information, see Chapter 17, Section 3: Defining and Analyzing the Problem.

2. Define your goals. The more distinctly you map out what you want, by when you want it, and how you are going to get there, the better equipped you will be to combat the problem or issue. Ending suicide is certainly a noble goal, but it's an intention you will have a difficult time fully realizing. Articulating smaller goals, or objectives, (e.g., we will decrease suicide by 15% in the next four years) fills in the details of the big picture. It can also be helpful to the morale of your group, by offering the chance to celebrate the successes you reach on the way.

More information on how to define your goals and objectives can be found in Chapter 8, Section 3: Creating Objectives.

3. Define your audience. Usually, you will want to target different groups of people in different ways. For example, if you are trying to increase immunization of children under two years of age, you would probably try to reach teen mothers, members of the immigrant community in your city, and the case and social workers who work with parents (to name just a few groups) in very different ways. Breaking your audience into subgroups to target separately is often known as market segmentation.

How do you do it? By deciding what are important factors for your group. Do teen parents tend to immunize their children less often than older parents? If so, you might want to consider teen parents as a subgroup. Can case workers help convince parents to immunize their children? Then they might be another subgroup.

Traditionally, subgroups have often been created by the following characteristics:

- Age
- Gender
- Race or ethnic group
- Economic status
- Past behaviors
Access to products

Which characteristics does it make most sense for your group to use? You might know immediately; all it will take is a few moments of brainstorming among members of your group. If you're not completely certain, or want to be sure you've thought of everyone, the following list of questions might prove helpful.

Questions to help choose appropriate subgroups:

- What are the possible subgroups? Be careful--you may want to use different groups from those listed above.
- Are there higher rates of the problem among any subgroups?
- Are some subgroups better able to address their problems?
- Are some subgroups more willing to address the issue?
- Can the organization afford the costs of addressing each new subgroup as a separate market segment?
- Do subgroups respond differently to marketing approaches?
- Do groups vary in the amount of resources available to them?
- Do they vary in the barriers they experience regarding change?

The answers to these questions will differ according to the problem or issue you are addressing, the resources you have, and the community you live in. Having the answers laid out in front of you, however, you are sure to make informed choices when choosing subgroups to target.

4. Understand your audience. Once you have decided which groups you will target as part of your social marketing campaign, you'll want to learn as much as you can about them, both in general and about their views of the problem or issue you are working on.

First, you'll want to look up general information about people in your target group. Where do they live? How much money do they make? How much schooling have they had? Many such records are open to the public, and can be had from the Census Bureau, hospital records, school records, the public library, or elsewhere. See Chapter 3, Section 4: Collecting Information About the Problem.

Next, you'll want to find out what your consumers think about the problem: how they feel about it, barriers to solving it, and what they want (what will convince them to change their behavior). This knowledge is crucial to setting up an effective campaign.

In the first section of this chapter, Chapter 45, Section 1, we discussed the "continuum of understanding" that people span, which looks something like this:

- Knowledge about the problem
- Belief in the problem's importance
- Desire to change
- Belief in one's ability to change
- Action
- Ability to maintain the change
As social marketers, you will want to find out where members of your target groups are on this continuum, and how you can nudge them on to the next step.

- For example, in a campaign to reduce the spread of AIDS, marketers discuss the problem with members of their target groups, and find clients have many different beliefs and attitudes about the disease. Some people are still unsure of what exactly AIDS is, or all of the ways it can be spread--they need to be brought to the "knowledge about the problem" stage. Others believe it is not a problem for them personally, or that "AIDS doesn't exist in our town;" these people are ready for messages on the problem's importance. Still others may believe in the problem's importance, and have taken actions to protect themselves, but do not do so consistently; they are having difficulty maintaining that change.

The marketers originally considered running only one campaign discussing the significance of the disease in their town. Looking at what they have learned, however, they realize that they need to create very different messages and services to effectively reduce the spread of AIDS in the area.

Also, you'll want to find out what's stopping people from using your program. If you don't understand the barriers and costs of your solution to your target audience, it's a good possibility your work will come to nothing.

- You might think, "Wait a second. We have a program to teach adults to read, and it's free! There aren't any costs or barriers to coming and learning. Why don't we have more people who show up?" But by talking to members of groups you have targeted, you learn:

  - Even though the classes are free, they are held far from where many potential clients live. Many people would need to take the subway to get there. That isn't free, and the subway isn't particularly safe at night, either. The money involved is a cost; and the lack of safety is a barrier.

  - The classes are at night, the only time many people get to see their families. Giving up time with their loved ones is a cost.

  - Many illiterate people are ashamed to admit to their loved ones (or even potential classmates or teachers) that they can't read. The stigma involved with illiteracy is a barrier.

After learning this information from potential users, the group is ready to make the changes needed to breathe new life into the program.

You also need to learn what people want--what can entice them to change their behavior. To use a commercial example, think about the campaign Pepsi® ran not too long ago. They said, "Drink Pepsi. Get stuff," and by doing so, capitalized on people's love of getting "stuff" free.

Your program or organization probably doesn't have the resources of the Pepsi-Cola Corporation. But you can use this information on a smaller scale, and have very positive results. You might find out, for example, that many women aren't using the science and math tutoring center because everyone who works there is male, and (women feel) the tutors are often sexist and discouraging towards women. What the women want is to have some female tutors as well.

So how do you obtain this information? Well, there are a lot of different ways to go about it. Some of the most common include:
Observe individuals and behaviors of interest. If you are interested in teen smoking, for example, you might go to the local high school or the mall, and just watch people, taking notes about what is happening.

Conduct behavioral surveys. Surveys can take place over the phone or in person, and can tell you a lot about what people do, and when and why they do it. See Chapter 38, Section 7: Using Behavioral Surveys for more information.

Conduct detailed interviews. Interviews can give you a lot of detailed, qualitative information you can't get from the (often closed-ended) questions of a survey. More information can be found in Chapter 38, Section 8: Conducting Interviews with Key Participants to Analyze Critical Events.

Conduct focus groups. Focus groups give you many of the same advantages as interviewing. In it, members of your target group can talk openly about the problem, feeding each other ideas and telling you things you otherwise might not have heard. They are discussed more fully in Chapter 3, Section 6: Conducting Focus Groups.

Survey people's satisfaction. Finally, a survey of satisfaction is helpful when people are already using your programs, and you'd like to see how you might improve your work. See Chapter 38, Section 4: Assessing Member Satisfaction with the Initiative.

Once you have heard from your target groups, you’re ready to start planning.

Choosing strategies: Brainstorming possible strategies, choosing those which are most appropriate, designing messages, and pretesting your ideas.

1. Brainstorming strategies. Now that you know what people want, or what potential barriers are, what can you do? How can you make it easier, or more attractive, for people to take advantage of your program? Several of you can work together to try to think up the most ideas possible. Chapter 17, Section 6: Generating and Choosing Solutions, discusses brainstorming techniques you can use as you begin strategizing.

2. Next, decide how much time and how many resources you will spend on each of your subgroups. Most groups have finite time and resources, and you probably won’t be able to concentrate on every group as fully as you would like. Where does it make the most sense to concentrate your resources? Do you want to concentrate on only one or two of the groups you have identified (perhaps the group most affected by the problem, or the group it will be easiest for you to help)? Or, do you want to spread out your work more equally over all of the target groups you have identified?

You might also try to decide if starting with any particular group is likely to set off a "domino effect;" that is, if you can convince one group to change their behavior, will that convince others to follow? For example, if you can convince older students in a school to become involved in an effort to recycle their soda cans and newspapers, younger students might follow without any specific efforts on your end.

These aren't simple questions, and the answers aren't going to be readily apparent. But by taking the time to decide now, you’ll save yourself work and headaches in the long run.

3. Decide whether to use different strategies for different segments, or just use different messages and mediums. Looking at the ideas you have generated, can they be generalized across groups? Or are they more specific to groups with different challenges and needs?

For example, if you are trying to increase the number of students who use the free clinic, publicizing the benefits might be enough of a draw for students whose school is across the street. If you want to convince students from the high school on the other side of town, however, your task is more difficult.
You might decide to open a satellite clinic on their campus, or provide free bus vouchers for those who come to the clinic.

However, if your group is trying to convince parents to immunize their children, you might have the same strategy for everyone you are targeting: promote the benefits of immunization and the advantages of the clinic. But the message would be phrased differently for high school mothers, for members of the professional community, and for members of the immigrant community, many of whom don't speak English. The medium would be different as well--the message for professionals might take the form of a technical article in the city magazine, for teens it might be a presentation at a meeting of teen mothers, and you might rely on word of mouth for the immigrant community.

Often, as we see in the immunization example above, strategies can be generalized for the different groups we work with. But be careful, and make sure that's true for your situation. Most importantly, remember the information you've received from members of those groups--using it will help your program to fly.

4. **Choose specific strategies with measurable objectives.** With all of the information you have gathered in the above steps, the best strategies should already be emerging. When making the final decision, ask yourself which of the strategies you're considering...

   - make the behavior change most attractive?
   - decrease the costs of the behavior change?
   - improve the customer's ability to adopt the behavior change?
   - decrease the attractiveness of the competing behaviors?

5. **Design messages appropriate to different groups.** Now that you know what you are going to do, how can you get the word out most effectively?

   First, develop messages based on the strategies you decided on above. What do you want to say, and to whom? And most important, *how* are you going to say it?

   Think about the language your target audience speaks. Sometimes, this is obvious--messages to Hispanic members of the community may be much more effective in Spanish; messages about illiteracy will be better placed on the radio or television than in the newspaper.

   But even beyond this, the way you say things is important. Young people often have a language all their own, and if you are directing a message at them, it should be in their language. Some groups of people tend to be wary of any authority, and won't take kindly to having "expert opinion" thrown in their face; for other groups, this is the only thing they will listen to. You should have already discovered what is important to your audience; use this understanding as you design messages.

   You might also want to consider using what's sometimes known as "panel design." That is, design messages that follow up on one another. For example, you might air advertisements or talk about the importance of physical exercise in general for a few months, and then, when the idea has had time to turn about in people's heads for a while, you can promote new exercise classes being offered at the community center. Or ads talking about the negative consequences of smoking can be followed by the creation of smoking cessation classes--which could be followed in turn by a support group for those who have quit. Using this method is an effective way of moving people along the "continuum of understanding" discussed earlier.

   Finally, as the saying goes, the more the merrier! If you have the resources to create and disseminate many different messages, do it. Diversity is key to survival in the biological world, and we, as community organizers, would do well to learn a lesson from the natural scientists. The more times a message is
given, and the more ways in which it is told, the more likely people are to really hear it—and finally, to follow it.

6. **Next, select channels of communication.** Is television the best way to reach your target audience? Or is your intended audience more likely to pay attention to newspaper articles? Talks by experts? Word of mouth? Keep in mind budget limitations when you are deciding on your most effective medium, but be creative—there are many free or low cost ways to disseminate your message. It's up to the brainstorming power of your group to find them. Sections in *Chapter 6, Promoting Interest in Community Issues*, can be particularly helpful as you go through this process.

7. **Finally, pretest your ideas and messages.** At this point, you've put a lot of time and work into your messages, and you're probably in a hurry to make them public. Pretesting your ideas with a few members of your target audience, however, is a very important step. Your message might be ineffective for reasons you hadn't thought of, or it could be insulting to members of your target audience. Pretesting stops an organization from embarrassing itself publicly, and lets you run messages with added assurance that they will say what you want them to.

**Implementing and evaluating your work.**

At this point, much of the hard work is over; you just need to go out and do what you planned. If you have planned the details carefully, this part should come together naturally.

After the plan has been implemented, though, you’re still not done. Social marketing is a continuous process, and the next step you need to take is to monitor your work, and make sure it’s effective. This evaluation is covered in great detail in Part J: *Evaluating Community Programs and Initiatives*, but some of the highlights include:

1. **Defining your goals?** We talked about the importance of this earlier in the section.

2. **Establish a tracking system --** how will you know when you are making progress towards your goals? Choose measures to follow that will tell you if you are making progress. These measures will often be the objectives you have already found, or might be even smaller measures.

3. **Continue to modify your work based on results.** If something isn't working, a small alteration is often enough to improve it significantly. If you're not sure what to do, ask members of the groups you targeted what they think.

4. **Finally, celebrate your accomplishments!** Community change takes a long time to bring about; and (especially) if you're running a successful social marketing campaign, you're probably in for the long haul. So when small victories happen, make them the cause for a big celebration.

**Do it again forever.**

If a social marketing campaign is aimed at long-term behavior change in the community, then it really never ends. This is true for local health initiatives or any other intervention meant to change community behavior: It really only works when people can see it, and when they *continue* seeing it, day in and day out. If you turn your back for a minute, the whole thing can fall apart. Eternal vigilance is not only the price of freedom; it's the price of any social change program or initiative.

The only exception is when the goal is time-specific and narrow. "We want to make sure Wal-Mart can't build here" might be a time-limited campaign, and be over when it's over. Long-term behavior change is rarely so limited. For example, "We want all kids vaccinated" goes on until babies stop being born in the community.
To sum it up:
Managing an effective social marketing campaign takes a lot of thought, resources, and elbow work. As in regular marketing, a lot of "behind the scenes" work takes place before a 30 second advertisement is ever aired. Effective efforts, however, have made huge differences in the lives of us all. Campaigns have helped us reduce our risks for heart disease and lung cancer; they helped us eradicate small pox and are helping us to realize what the World Health Organization terms, "a world without polio." Your organization, too, can use this powerful tool to help you achieve your goals.

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Resources

Web pages
Social Marketing Place http://users.aol.com/weinreich Definitions, articles, and links
The Social Marketing Network of Canada http://www.hc-sc.gc.ca/hppb/socialmarketing/ Introductory information, presentations, case studies, tutorials and links to other sites
Substance Abuse Prevention Institute http://p2001.health.org/ Helpful articles and training materials on a variety of subjects

Print Resources

Listservers
To subscribe to the social marketing listserv run by Alan Andreasen at Georgetown: Send mail to listserv@listserv.georgetown.edu with a message saying "subscribe soc-mktg your name" with your own name in place of "your name." The listserver will return a message asking for confirmation and then you’re on.