
Ten Steps for Developing a Social Marketing Campaign

Most successful social marketing campaigns can be broken down into the following 10 steps:

Step 1: Define Your Audience

Be specific and learn as much as possible about the target audience. One way to define the target audience is to describe their demographics (for example, heterosexual males between the ages of 14 and 18 who smoke). In addition, paint a vivid picture of the individuals *within* the group; understand their attitudes, feelings, beliefs, values, motivation, and culture—all the factors that might influence their behavior.

Step 2: Identify Evaluation Measures

Evaluation is a big part of all prevention efforts. This is no exception. Evaluate whether the campaign was implemented as intended and if the specific goals were met. Start developing the evaluation strategy early in the planning process. Think carefully about the evaluation questions, the best ways to collect the necessary information, and the type of people to bring on board to help in the process.

Establishing a direct correlation between the campaign and any observed outcomes may be difficult because a communications campaign does not exist in a vacuum. However, it's possible to evaluate broader, population-level changes in behavior and compare them to a baseline before the marketing campaign began. For example, Massachusetts has conducted a large-scale, multi-million dollar anti-smoking campaign, funded solely by a tax on tobacco products. To assess change, they measure the difference in the number of cigarette packs sold before and since the campaign began.

Step 3: Identify Channels

It's important to think about how to communicate the intended message. One option is to deliver the message *directly* to the target audience. Common marketing channels include television or radio commercials, interviews, and public service announcements. They include newspaper or magazine articles, editorials, and print ads; billboards; and banners across main streets. In addition, websites, email lists, bulk mailings, and special events, contests, and awards can be used. In selecting appropriate dissemination channels, consider the costs involved. Think about where the target audience gets its information, and which channels they consider most credible. Also, keep in mind that the most effective campaigns combine mass media with other efforts, such as community events and small-group discussions.

Another option is to deliver the message *indirectly*, through intermediaries associated with the target audience. Intermediaries include people who work with these groups, such as coaches, teachers, and counselors. This group may include other people who are respected, such as athletes, clergy, and community and political leaders. Intermediaries can also be credible organizations, such as citizens' advocacy groups and local agencies.

Step 4: Identify Benefits

The exchange principle asserts that in order for people to voluntarily give something up or try something new, they must benefit in some way. Ask the following question: Why would the target audience want to adopt the behavior promoted in the campaign? Think about this question from the audience's perspective. For example, to convince people over 50 to start exercising, highlight benefits such as increased energy and protection against osteoporosis. But to convince young adults to exercise, "sell" the idea that going to the gym is a great way to get in shape and increase your sex appeal.

It's also important to differentiate between long- and short-term benefits. People tend to gravitate toward short-term benefits: They're more immediate and enticing. Therefore, in the example above, increased energy—a short-term benefit—may be a far more compelling reason for people to exercise than developing stronger bones. However, only solid research will tell for sure.

Step 5: Identify Obstacles

To achieve an exchange, it is also important to identify any *obstacles* that might prevent members of the target audience from adopting a given behavior. For example, when promoting treatment for alcohol and drug issues, find out whether treatment slots are, in fact available; whether members of the target audience have insurance coverage; and if the programs can be reached using public transportation.

Another example is encouraging a group of adults to quit smoking. The sheer power of nicotine addiction, plus the strength of the habit of smoking, are both big obstacles that prevent many people from quitting. The prevention message must thus be compelling, and salient enough to overcome these barriers. In order for the "exchange" to work, the benefit of adopting (or giving up) a behavior must be greater than the cost.

Step 6: Determine the Message

This is a critical step. When creating a message, be very clear about the behavior you want to elicit. Do you want the audience to make a telephone call? Send for information? Stop doing something—like smoking—or start doing something—like talking to their children about alcohol, tobacco, and other drugs? People who see or hear the message must be clear about what is expected of them.

Next, create a message that builds on what has been learned about the audience: their existing knowledge, concerns, and interests. Try to emphasize positive behavior change rather than negative consequences. For example, the message "Use a designated driver" offers people concrete information for how to get home safely, whereas "Don't Drink and Drive" simply tells people what not to do.

Finally, determine the tone and the style of the message. Tone is an elusive quality but is very important in a social marketing campaign. Determine if the message is intended to be informative? Emotional? Humorous? A combination of the above?

Remember: all the "pieces" of the message—headlines, illustrations, and copy—should work together to immediately establish what is being offered, what the benefits are, and who is advertising it. People should know at a glance what the message is about.

Step 7: Test and Refine

It's very important to "pre-test" the message. The best way to do this is to test the message on focus groups that represent the target audience. Present them with several message samples and record their impressions and reactions. Then use their feedback to refine the message. Test the message for comprehension, attention, and recall; strong and weak points; personal relevance to the target audience; and sensitivity to cultural and/or audience-specific characteristics.

Step 8: Collect Data

Collect data to determine whether the message is having an impact. Data collection might involve conducting more focus groups, administering surveys, or doing telephone interviews. Data collection methods should be dictated not only by cost, but also by the questions you want answered and the kind of information you want to collect. Whenever possible, work with an evaluator to design and implement your data collection efforts. Learn more about finding and analyzing epidemiological data.

Step 9: Modify Your Work, Based on the Data

Even the best-researched campaign often needs some tweaking once it has been launched. Use the data collected to refine and adjust the message, communication channels, and promotion strategies. If something isn't working, a small alteration is often enough to improve it significantly. If unsure, go back to the target audience and ask them what they think.

Step 10: Write an Evaluation Report

This is often required by the funder. Yet, even when it is not, creating a report is a helpful way to organize the information collected so that it can be shared with others and garner support for future efforts. In the report, present the intended campaign accomplishments, broad lessons learned, and remaining tasks or recommendations for follow-up. Try to be concise, avoid jargon, and present a balanced set of findings.

When moving through each of these steps, always keep a clear picture of the target audience. The most valuable asset is knowledge of the audience. Don't ever underestimate just how critically important that knowledge is to the success of any social marketing campaign.

References

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- [Conducting a Social Marketing Campaign at Community Tool Box](#), University of Kansas Work Group for Community Health and Development
- [Making Health Communication Programs Work: A Planner's Guide at the National Cancer Institute](#)

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