



# Social Marketing Primer

**What is social marketing,  
and why is it important  
for changing behaviors  
for good?**



**Social marketing** is a discipline that seeks to change behaviors for the good of society, communities, and people. Said in a simpler way, it is changing behaviors for good.

The discipline of social marketing is built on a significant base of research that shows awareness and education alone rarely change behaviors. In order to create meaningful, sustainable behavior change, social marketing must use strategies that aim to overcome barriers and provide people with personal, relevant motivators to act. This approach increases the efficiency and effectiveness of marketing efforts by identifying the specific behaviors that must change to achieve a program's goals, segmenting audiences based on who has the highest probability of changing the desired behavior, identifying the barriers preventing the behavior, the benefits to the audience, and the motivators that are most likely to overcome barriers and spur change.

It is often assumed that social marketing only employs communications strategies to change behavior when in fact, the main premise of social marketing is to use a strategic planning process to determine the tools that will have the biggest impact on spurring desired behavior changes. The social marketer's toolbox includes strategies such as incentives, policy changes, social diffusion, feedback, commitments, and also often communications. But communications is not always a part of the mix or might just complement other strategies. Here are two examples that illustrate this point.

- Distracted driving campaigns from across the country have used policies and laws in combination with communications and social norms to change behavior.
- Dog poop pick-up programs learned early on that a key barrier for dog owners was forgetting to bring a bag. Dog owners knew what the correct behavior was and did not need to be convinced. The installation of signage and bag receptacles on trails and in parks is an example of overcoming this barrier by providing a prompt and the needed tool in convenient locations. Communication tools were not needed in this social marketing mix.

## Social Marketing Planning Process

Creating a social marketing strategy can be achieved by following a prescribed process that allows you to make deliberate decisions about the framework of your program. The process relies on using research and other strategies to narrow your approach to what will be most effective in achieving your program's goals.

The following 10-step process for developing a social marketing campaign should be used to create the framework for a campaign before development begins.



## Step #1

### Identify Project Purpose, Goals, and Objectives

There is a quote from Alice in Wonderland, “If you don’t know where you’re going, any road will get you there.” So is true for a social marketing campaign. You need a clear vision and articulation of your desired end destination. Your project purpose is why you are doing what you are doing (e.g., prevent HIV infections), your goal is what you want to achieve (e.g., increase HIV testing among high-risk people), and your objectives are how you know if you’ve gotten there (e.g., increase HIV testing by X%, by when). Defining these variables provides the compass for your project. Everything you do in steps 2-10 should point you towards your purpose, goals, and objectives. This is the most important step in the planning process.

#### **Pitfall: Objectives are not measurable.**

It is important to ensure that you set measurable objectives up front. And you need to figure out how you are going to measure against those objectives. What data do you need? How will you collect it? If your objective is not measurable, you need to redefine it and find one that is.



## Step #2

### Research

Good campaigns and materials are grounded in research. Research should be used to understand priority audiences’ current actions and identify what they think and feel about the subject matter and behaviors. It can also be used to help evaluate a program’s effectiveness. There is a variety of research methodologies that can be employed including:

- Secondary research should always be your first step. Look around and see if someone else has already done the research you need. There is no need to recreate the wheel if the data exists from another credible source. There is often very good research already available for many of the issues social marketers address.
- Quantitative studies are good to help develop baseline data, define priority audience groups and gather information about barriers, benefits, and motivators.
- Qualitative studies allow you to delve deeper with audience groups and to test messaging and concepts.
- Observational studies are useful when there is a concern that the audience groups might not accurately report on their own behaviors. This can often be the case when working on social issues where people answer how they think they are supposed to answer instead of accurately reporting what they think/do. These studies can be a great option for understanding behavior and evaluating behavior change results.

Once you’ve completed the foundational research for your campaign, you should create a research key insights briefing document that can help guide your campaign and inform other involved stakeholders of what you learned.



### **Pitfall: Failing to trust the research.**

It is important to ensure that you set measurable objectives up front. And you need to figure out how you are going to measure against those objectives. What data do you need? How will you collect it? If your objective is not measurable, you need to redefine it and find one that is.

## **Step #3**

### **Identify Desired Behavior Changes**

In this step, you want to determine the specific desired behavior changes that are the most direct path to achieving the program's goals. This is often done by mapping which behaviors have the highest impact on the goal and the highest probability of change. Behaviors should be as specific as possible and non-divisible. For example, rather than telling people to get vaccinated, you want to tell people to get a specific vaccine. The reason for this is that each vaccine may have different audiences as well as unique barriers and motivators that need to be addressed to get people to act. It is also important to note that there can often be multiple behavior changes needed along the path to the ultimate desired outcome for your campaign. It can be a useful exercise to map the steps your audience needs to take to get to the end desired behavior. Keeping with the vaccine analogy, when the COVID-19 vaccine was launched, people had to:

1. Decide to get the vaccine
2. Determine if they were eligible
3. Make an appointment
4. Show up and get the vaccine

Each of these steps had unique barriers and required specific instruction and each step was a possible place where the audience may have dropped out and not followed through with the behavior to get their COVID-19 vaccine.

### **Pitfall: Choosing too many behaviors.**

We know that if you try to tell people too many things, they are likely to do nothing. It is important to focus on one behavior at a time. And, yes, this can be hard. As social marketers, we have so many things we want people to do that it is tempting to try and "get it all in" at once. Avoid this urge and do a good job at addressing one behavior at a time. In the long run, you will be more successful at changing behavior.





## Step #4

### Define Priority Audiences

Your priority audiences are those that are most likely to be receptive to changing their behaviors. Hopefully, you were able to identify audience segments in the research you conducted in Step #2. Audiences can be defined as:

- **Primary:** People that you want to change their behaviors
- **Influencer:** People that can influence your primary audience to change their behavior

You can generally think of audiences in three groups related to any particular behavior change. The “show me” group. These are people that are the early adopters of your desired behavior. They are going to adopt it right away with no or little intervention. The second group is the “help me” group. These are the people that are the priority audiences for a social marketing campaign. They need help understanding the issue and overcoming the barriers they have to changing their behavior. The third group is the “make me” group.

This group is very resistant to the behavior and may require a law or regulation before they will make the change. You can think of mapping these three groups on a typical social diffusion curve with the “help me” group typically representing the middle section of the bell curve as shown in this visual:



#### **Pitfall: Thinking your audience is “everyone.”**

Your audience is NOT “everyone” or the “general public.” If you try to be everything to everybody, you won’t be anything to anybody. To be effective you must define who your audience is in terms of the barriers, benefits, and motivators related to your desired behavior change. This will never apply to everyone. To be effective, you need to segment your audiences so you can create custom messages and strategies based on the unique barriers and motivators of each of your priority audience segments.



## Step #5

### Identify Barriers, Benefits, and Motivators for the Desired Behavior Changes

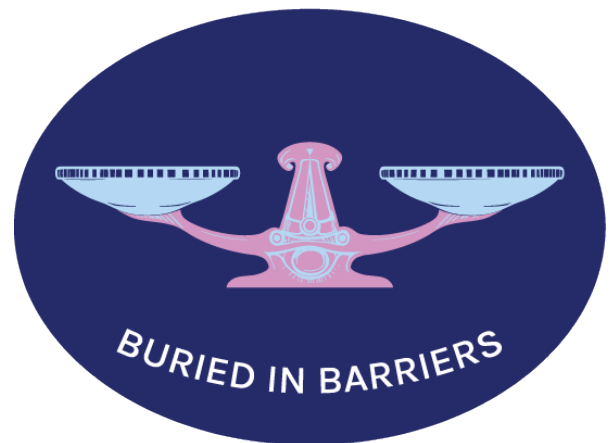
Once you know what behaviors you want people to adopt, the next step is to analyze the barriers that are preventing them from doing the desired behaviors, and the possible benefits and motivators that could overcome those barriers. Each of these elements is defined as follows:

- **Barrier:** What is stopping your audience from doing the desired behavior?
- **Benefit:** What benefit will be delivered to the audience if they practice the behavior? What's in it for them?
- **Motivator:** What will motivate the audience to act to change their behavior?

This is a key part of the process and one that often provides a reality check. If the motivators for a particular behavior change are not strong enough to overcome the barriers, you will want to rethink that behavior change or figure out how to offer stronger motivators. The goal here is to set you up for success—pick the achievable behaviors and focus your efforts there.

#### **Pitfall: Buried in barriers.**

Often it is too easy to come up with a long list of barriers that are preventing the desired behavior change. The key is to narrow down to the top one or two things that are preventing change for your audience. Since you will be working to overcome key barriers through the strategies you chose and your messaging, you need to be singularly focused on overcoming the primary barrier that is in the way of change for your audience.



## Step #6

### Create a Messaging Strategy

A succinct and compelling message strategy is critical to help ensure the success of social marketing efforts. We live in a world where the average person is exposed to between 2,000 and 3,000 marketing messages each day. We have about three to five seconds to catch someone's attention so that they continue reading or viewing to learn more. Once you've caught their attention, the average millennial will spend 14 seconds more on the content. For Gen Z, it's 8 seconds. This highlights the need to be compelling and very succinct in your message strategy. One way to help you do this is to create key value propositions. A value proposition has the following structure (framed in the first person from the perspective of the priority audience):

**If I [desired behavior change], I will [benefits/motivators] because [proof points/support].**

**Example: "If I purchase ENERGY STAR products, I will be making a smart decision that helps protect the environment and saves money on my energy bills because ENERGY STAR is a simple way I can know that a product uses less energy."**



A good message strategy finds the “key insight” that will drive behavior change. It ties back to earlier steps in the process. If you have a well-developed profile of your priority audience’s barriers, benefits and motivators, this step should flow naturally from the work you’ve already done. Additionally, good messaging also involves keeping things simple (can the audience understand the main message in 3-5 seconds?) and striving to create an emotional connection with the audience. An emotional connection helps catch attention and drives message retention.

### **Pitfall: Selling features instead of benefits.**

People buy benefits, not features. They don’t want to hear about how something works, they want to hear about what it will do for them. Make sure your messaging strategy is focusing on benefits and resist the urge to explain features. Here are a few examples of headlines that illustrate focusing on benefits:

- “Do More of Whatever You’re Into”  
(young adult COVID-19 vaccine campaign)
- “Food Lovers Save Money”  
(food waste prevention campaign)
- “Save the crabs, then eat ‘em”  
(government agency focused on water quality)
- “While you’re sitting in traffic, Dan is watching cat videos”  
(municipal transit agency ad)



## **Step #7**

### **Choose Your Social Marketing Intervention**

This step is the point in the process where we prioritize and choose what social marketing tools will work best to influence behaviors among the priority audience groups. Below is a list of common social marketing tools.

- **Commitments:** Making a commitment to change a behavior makes it more likely that people will follow through. The more visible and durable the commitment is, the more likely the audience is to try the behavior change. A visible commitment is one that is publicly shared. A durable commitment is one that persists and can be witnessed over time. It is also important to note that commitments that are made in writing are more effective than verbal commitments.
- **Social Norms:** People will change their behaviors if they believe everyone else has done so. If your issue has a social norm present—most people already do the desired behavior—it can be a powerful strategy to point that out to the priority audience group you are trying to influence.
- **Social Diffusion:** Peer and referent groups (friends/family, people they work/go to school with, people in their geographic vicinity) spread behavior change through conversations, interactions, and observation of each other. Looking for ways to spur social diffusions within your priority audience groups is an effective social marketing tool for many campaigns.



- **Prompts:** Placing reminders to act as close to the location of behavior as possible (for example signage or mobile/text reminders) is an effective way to remind people to do a behavior.
- **Policy/Regulation:** Creating policies can help throughout the behavior adoption curve. Early on with the “show me” group, policies can build momentum for the desired behavior change. For the “help me” group they can help overcome barriers and build momentum for a social norm. For the “make me” group they can provide strong incentives or disincentives for not practicing the behavior.
- **Communication:** There are many communications tools that can be employed in the social marketer’s toolbox. These tools seek to capture attention, overcome barriers with motivators and highlight benefits. Examples include advertising, media relations, social media and digital media. It is important to pick the tools/channels that have the best reach to your priority audiences.
- **Incentives:** Providing a tool or discount that helps overcome a barrier to trying the behavior. Incentives can be monetary (e.g. rebates on energy-efficient products) or non-monetary (e.g. dog poop bags at parks).
- **Convenience:** Convenience stems around making it easy to do the desired behavior. For example, providing free masks and sanitizing stations in public locations is one example of convenience. Automatic scheduling of your second COVID-19 vaccine appointment is another. Opt-out versus opt-in strategies are another example of a convenience tool. Many programs have shown that if people are asked to “opt-out” rather than asked to “opt-in” they get a much higher rate of participation. Examples include automatic enrollment in 401K programs or organ donation programs.
- **Cognitive Dissonance:** Many social issues have cognitive dissonance at play. This is when people’s values and beliefs are not matching their behaviors. A good example of this is with recycling. In one study, 94% of people said they were “very good” recyclers and that recycling/reducing waste was very important to them. Yet a waste sort study showed that 50% of what is in garbage cans was still recyclable. So, it was important to people that they recycle, but they were perceiving that they were doing a better job at recycling than they actually were. If your issue has a case of cognitive dissonance like this, a first step can be to point out the dissonance to your audience to set the stage that they need to act differently to align their behaviors with their values.
- **Recognition/Feedback:** People want to know that their behavior is making a difference. Report back with messages like, “XX% of people or groups have committed to do the behavior” or “Thank you, you helping make a difference.” This feedback acts to solidify the behavior habit among your audience by confirming that they made the right choice and their behavior is making a difference.

Every program will use a different combination of the tools listed above. Your challenge in this step of the planning process is to pick the tools that will most efficiently help get you to your program’s goals.





### **Pitfall: Thinking awareness leads to behavior change.**

It is logical to conclude that if someone knows about a social issue or a problem, they will change their behavior to try and address it. This is not true. Behavioral science research has shown over and over again that awareness alone typically does not correlate with changing behaviors. This finding is the foundation that the social marketing discipline is built upon. Instead, you need to define the specific barriers for your audience to changing their behavior, the benefits the behavior will provide them, and the motivators you can offer to get them to act.



## **Step #8**

### **Identify Partners**

Partnerships can help create demand for a program by providing access to a larger audience, incentives for program participants, and adding credibility to the cause. Good potential partnerships have the following characteristics:

- **Complementary missions:** You should have complementary goals, or at least goals that are not in conflict.
- **Audience alignment:** The partners' audiences should overlap with your campaign's priority audiences.
- **A balance of value:** It is important to make sure the potential partner has something of value to offer/bring to the table and that in turn, you have something of value to offer to them.
- **Collaborative history:** It is also good to look for partners with a history of collaboration and community involvement. A good partnership makes things easier, not harder.

You can consider partners in the private, public, and/or non-profit sectors. For some programs working with local media partners can provide added exposure and value to the program. To get started identifying your partnership strategy, make a list of all potential partners and then rank them based on the criteria listed above.

### **Pitfall: Telling a partner why you need them; instead of why they need you.**

When you approach a partner, always start with their perspective. Learn as much as you can about them before you reach out. Then, craft the conversation around their needs. Think of this as a mini social marketing plan. What are you asking the partner to do? What barriers are in the way for them? What benefits and motivators can you offer the partner?





## Step #9

### Develop a Marketing Plan

A fully developed marketing plan is crucial to the success of social marketing efforts. This plan shares how to operationalize social marketing tools and deliver the program's message to priority audiences, as well as define outreach strategies and tactics that will deliver on the program's goals and objectives. When you think about your plan, strategies are broad and tactics are specific. So, if you decide in Step #7 that commitments are going to be part of your strategy, in this step you define how that will work (the tactics). Is it an online commitment? How will you make it visible? How will you promote it? You will likely have several marketing strategies with a variety of tactics supporting each strategy. Make sure that you do a check back at this point to confirm that your marketing strategy is going to help you achieve your program goals and objectives as defined in Step #1.

It is always better to start with a pilot and then scale larger. This allows you to learn from a smaller-scale implementation (in terms of audiences or geography) and then make adjustments before you invest in a full roll-out.

#### **Pitfall: Starting with this step.**

The main pitfall for Step #9 is that people start with this step! They jump straight to figuring out how they want to communicate and tools they are excited about using rather than taking the time to complete steps #1-8 first. If you do start here, it is guaranteed that your program will not be as effective as it could be. It is critically important that you create your framework by completing the earlier steps before jumping into your marketing strategy.



## Step #10

### Create an Evaluation Plan

The evaluation plan is designed to track your program's progress, celebrate successes, and make necessary changes along the way. It includes measurements of campaign inputs, outputs, outcomes, and overall campaign impact.

- **Inputs** are the resources (budget, staff time, etc.) that you put into a campaign.
- **Outputs** are the reach and engagement of your campaign (people reached, events held, social media engagements, etc.).
- **Outcomes** are what happened as a result. The number of people that changed their behavior or changes in awareness levels or attitudes.
- **Impacts** map back to your campaign's purpose (see Step #1). If your purpose is to reduce deaths through vaccination, did that happen? Did you reduce carbon emissions through energy efficiency adoption? Reduce waste going to the landfill through recycling?



At the end of the day, impact is the ultimate thing you want to measure in a social marketing program. However, having all four elements (inputs, outputs, outcomes, impact) included in your evaluation plan gives you good markers to evaluate progress, and also allows you to analyze what you might want to change or adjust as your program continues.

**Pitfall: Self-reporting bias.**

Failing to account for self-reporting bias in your evaluation strategy is a common pitfall for this step. People often tend to answer questions about social issue behaviors how they think they are supposed to answer, instead of accurately reporting their true behaviors. One example is distracted driving where people tend to underreport how often they use their phone while driving. Wherever possible, you can avoid self-reporting in your evaluation strategy by figuring out how to instead measure actual behavior changes rather than surveying people. For distracted driving, this could mean using observation studies to track how many people are visibly touching their phones before and after your campaign. If you have to use self-reported data, ensure you have a baseline and measure the amount of change, not absolute numbers, so that you can isolate the impact of self-reporting bias.



## The Bottom Line

The process described here is scalable to the scope of each program, campaign, or outreach effort. For example, if your goal is to create behavior change for a new program, you should use the full 10-step social marketing planning process as described above. If your goal is to support an existing program that is already partially developed, you can apply a simplified version of the process to meet your needs. But no matter the scale or scope of your campaign, the essence of the planning process is to clarify the objectives and how you will measure success, identify the priority audiences most likely to act, create messaging that cuts through the clutter, and create a plan to deliver that messaging at the right time, in the right place. Applying these basic steps will help you ensure that your social marketing efforts have the maximum impact possible for the resources you invest.

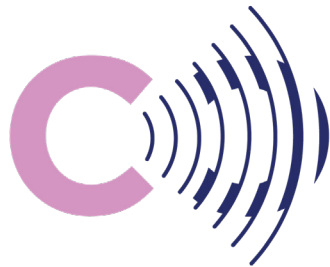
**You can find a social marketing workbook to help with your planning process at:**

[cplusc.com/social-marketing-workbook](https://cplusc.com/social-marketing-workbook)



# Let's Talk

Need to convince the world to eat their metaphorical (or actual) vegetables? Great. Our team is led by internationally-acclaimed experts in community-based social marketing and we're ready to help you make the world a better place.



C+C | ALL ABOUT THE GOOD

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