

KEY SOCIAL MARKETING TERMS

Barriers
Benefits
Competition
Determinants of behaviour
Exchange
4Ps of marketing
Market research
Market strategy
Place
Price
Product
Promotion
Target audience

Definitions

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| Activities | See Intervention activities. |
| Appeal | A message quality that can be tailored to one's target audience(s). This term refers to the motivation within the target audience that a message strives to encourage or ignite (e.g. appeal to love of family, appeal to the desire to be accepted by peer group, appeal to pride in one's identity group). |
| Attitudes | An individual's predisposition toward an object, person, or group, that influences his or her response to be either positive or negative, favourable or unfavourable. |
| Audience | See Target audience. |
| Audience profile | A formal description of the characteristics of the people who make up a target audience. Some typical characteristics useful in describing segments include media habits (magazines, TV, newspaper, radio, and Internet, etc.), family size, residential location, education, income, lifestyle preferences, leisure |

activities, religious and political beliefs, level of acculturation, ethnicity, ancestral heritage, consumer purchases, psychographics (see Multivariate psychographic characteristics).

Audience segment(s)

A subgroup of people within the target audience who are enough alike on a set of characteristics, such as risk for a health problem, behaviours, behavioural determinants (see Determinants of behaviour), demographics and/or psychographics that one can develop a market strategy and intervention activities that are mostly likely to be equally successful with all members of the segment.

Audience

The aggregation of the target population into homogeneous segmentation groups on the basis of one or more common characteristics related to the health problem, such as the risk for a health problem, current behaviours, behaviour determinants, psychographics and/or demographics.

Barriers

Factors that get in the way of the audience adopting the desired behaviour change. These may be external or internal to the audience members themselves (e.g. a lack of proper health care facilities, the belief that fate causes illness and one cannot alter fate, a lack of skill to use a condom correctly, etc.).

Baseline study

The collection and analysis of data regarding a target audience or situation prior to intervention. Generally, baseline data are collected in order to provide a point of comparison for an evaluation.

Behavioural objective

Clear, specific, feasible action that you want your audience to take. The action can be a one-time event (having a vasectomy), repeated but finite (getting a child fully immunised), repeated daily actions that take little effort (wearing a seatbelt), situational actions (using a condom during sex) or permanent lifestyle changes (quitting smoking).

Benefits

Advantages that the audience associates with a behaviour. What the audience will obtain from the desired behaviour change (see Exchange).

Bounceback cards

A pre-printed, pre-addressed, pre-paid postcard distributed with the programme materials. Recipients are asked to respond to a few simple questions about the materials and then return the postcard by mail.

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| Branding | Developing words, images, and tone (see Tone) that are used consistently in all communication that promotes the desired behaviour change and any associated products or services to the target audience. Brands are a shorthand way to communicate the value of the behaviour change and help inspire your audience to action. |
| Central location intercept interviews | Face-to-face interviews conducted with respondents who are approached and asked to answer questions at a highly trafficked location that is frequented by individuals typical of the desired target audience. |
| Changeability | The extent to which a contributing factor can be affected through an intervention. |
| Channels | The routes or methods used to reach the target audience (see Interpersonal channel, Small group channel, Organizational channel, Community channel, Mass-reach medial channel). |
| Closed-ended questions | Questions worded to provide respondents with a limited number of response choices (e.g. multiple-choice questions, yes/no questions, Likert scale items). |
| Communication campaign | Goal-oriented attempts to inform, persuade, or motivate behaviour change in a well-defined audience. Campaigns provide non-commercial benefits to the individual and/or society, typically within a given time period, by means of organised communication activities (Centre for Health Promotion, University of Toronto, 1997: available online at http://utoronto.ca/chp/). |
| Community channel | A communication channel in which messages are disseminated at the community level (e.g. a library, supermarket, local swimming pool). |
| Competition | The behaviours and related benefits (see Benefits) that the target audience may prefer over the behaviour you are promoting. Competition also encompasses the organisations and persons who offer or promote alternatives to the desired behaviour. |
| Comprehension | A measure to determine whether messages are clearly understood. |

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| Concept testing | The process of learning about the target audience's responses to possible concepts (see Creative concept) on which you might base your communications materials. This process usually requires qualitative research, such as focus groups. |
| Contributing factors | The determinants that directly or indirectly cause the problem. A contributing factor can be biological, behavioural, or attitudinal; or an element of the physical or social environment; or the result of policies related to the problem. |
| Convenience samples | Samples of respondents in research studies who are typical of the target audience and easily accessible. No attempt is made to collect a random sample (see Random sample), and convenience samples are not statistically representative of the entire population being studied. Therefore, findings from studies using convenience samples are not generalisable. |
| Cost/benefit evaluation | Examines the overall cost of a programme compared to the dollar value of the effects that can be attributed to it. These two values yield a cost-benefit ratio. |
| Creative brief | A document which includes information that will be needed by a creative team in order to develop concepts and messages for the communications interventions. It includes the goal and main messages of the communications, the actions you want the target audience to take, and the demographic/psychographic characteristics and other key insights about the audience that should be taken into account when developing the communications, e.g. settings, channels, and activities for reaching them. Secondary audiences are also profiled. |
| Creative concept | <p>The central theme of a communication effort to which all messages are related. Concepts represent the "hooks" to which an audience can connect or relate. Examples of concepts include:</p> <ol style="list-style-type: none"> 1) To dispel the belief that one must go to a gymnasium or pay for membership of a health club to be physically active, communications materials will demonstrate a variety of ways to engage in moderate amounts of physical activity outside of a gym or health club and include the phrase, "no membership needed". 2) To show women how hard it is to consume enough folic acid from naturally occurring dietary folate, materials |

will display a picture of many Brussels sprouts with the text, “To protect your unborn child from birth defects, you would need to eat this many Brussels sprouts every day, Or, take one of these, Folic Acid. It needs to start when birth control stops.”

Credibility

A quality that contributes to the ability of a message source to influence the target audience. Some components of credibility include whether the message source is trustworthy, believable, reputable, competent, and knowledgeable.

Demographics

Data such as gender, age, ethnicity, income, or education that can be collected from a target audience, and can be useful for defining the target audience and understanding how to design effective interventions for the target audience.

Determinants of behaviour

Factors, either internal or external, that influence an individual’s actions or behaviours. Behaviour science theories and models list various determinants.

Doer/Non-Doer analysis

Research and data analysis method where audience members who do perform the behaviour in question (doers) and those who do not (non-doers) are asked a set of six brief questions about the behaviour’s consequences, their ability to do the behaviour, and what other people think about that behaviour. Researchers then look for the differences between the doers and non-doers that would suggest possible areas for effective intervention strategies.

Earned media

Coverage of your story through a letter to the editor, a press conference, an appearance on a talk show or local news programme, news releases and on-air or print interviews. Such coverage is called “earned media” because you have to develop materials, work with reporters, and expend resources to get it.

Effects evaluation

A measure of the extent to which a programme accomplished its stated goals and objectives. Also called impact, outcome, or summative evaluation.

Environmental factor

A component of the social, biological, or physical environment that can be causally linked to the health problem. (Adapted from Green, L.W. and Kreuter, M.W. (1991) *Health Promotion Planning: An Educational and Environmental Approach*. Mountain View, CA: Mayfield.)

Evaluation

Assessing a component of an intervention that compares what was expected to what was observed.

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| Evaluation plan | Written plan that documents all the tasks related to the evaluation (e.g. designing surveys, planning data collection and analysis, reporting on findings). |
| Exchange | The concept that people compare the costs and benefits (see Barriers and Benefits) of performing a behaviour before actually doing it. The benefits must outweigh the costs in order for people to perform a behaviour. |
| Executive summary | An overview of a project, evaluation, or research findings generally presented at the beginning of a report that highlights such issues as activities that took place, why a study was conducted, how it was carried out, and results and recommendations. |
| Expert review | Examination and critique of programme plans or materials by selected people who are knowledgeable in a relevant content area. |
| Fear | A mental state that motivates problem-solving behaviour if an action (fight or flight) is immediately available; if not, it motivates other defence mechanisms such as denial or suppression (see Green, L.W. and Kreuter, M.W. (1991) <i>Health Promotion Planning: An Educational and Environmental Approach</i> . Mountain View, CA: Mayfield, pp. 431-2). |
| Fear appeals | Attempting to elicit a response from the target audience using fear as a motivator (e.g. fear of injury, illness, loss of a loved one). |
| Fixed costs | Non-variable costs for planning, implementing, and evaluating a social marketing programme (e.g. video equipment purchased for training seminars). |
| Focus group | A type of qualitative research in which an experienced moderator |
| interviews | leads about 8-10 respondents through discussion of a selected topic, allowing them to talk freely and spontaneously. |
| Formative research | Research conducted during the development of a programme to help you decide on your target audience, understand the factors which influence their behaviour, and determine the best ways to reach them. It looks at the behaviours, attitudes and practices of target groups, involves exploring behavioural determinants, and uses myriad methods to collect data. Formative research may be used to complement |

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| | existing epidemiological and behaviour data to assist in programme planning and design. |
| Fonotovela | A print item (usually a booklet) in which a story unfolds through the use of photos of characters with their thoughts or conversations written alongside. |
| 4Ps of marketing | Four classes of strategies and tactics to consider when planning intervention activities for a target audience – Product, Price, Place, Promotion (see Product, Price, Place and Promotion). |
| Gatekeeper | Someone with whom you must work before you can reach a target audience (e.g. a schoolteacher) or accomplish a task (e.g. a television public sector director). |
| Generalisable finding | A study finding from which you can make reliable inferences about people, places or settings similar to those in the study (adapted from Sarvela, P.D. and McDermott, R.J. (1993) <i>Health Education and Evaluation Measurement: A Practitioner's Perspective</i> . Dubuque, IA: Brown and Benchmark). |
| Geodemographics | Geographic factors and trends in a specific locale (e.g. where people live, population density, healthcare, climate, eating patterns, spending patterns, leisure activities, local industry, and outdoor activities) that can help with locational decisions (e.g. selecting a clinic site), selecting a target audience or planning local interventions. Census data and information from commercial marketing databases (e.g. PRIZM, Macrovision 50) are often used as sources for this information. |
| Goal | The overall improvement in the health problem that the social marketing programme will strive to create. |
| Health behaviour | An action performed by an individual that can negatively or positively affect his or her health (e.g. smoking, exercising). |
| Health communication | The study and use of communication strategies to inform and influence individual and community decisions that enhance health. |
| Health communication intervention | The use of communication activities (advertising, public relations, print materials, promotional materials, signs, popular media, etc.) to influence behaviour change. |
| Health indicator | A statistical point of reference for determining the health status of a community in response to a health problem. |

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| Health policy intervention | Using regulatory, legislative, or organisational rulings to influence and support behaviour change. |
| Health product intervention | Modifying or providing a new object that supports a behaviour change (e.g. a needle-free blood glucose monitoring kit or journals to plan and track food intake). |
| Health service intervention | Modifying or providing a new service to influence and support behaviour change, such as STD risk reduction counselling, in-home breastfeeding consultation, or a drug-risk prevention hotline for parents. |
| Impact evaluation | See Effects evaluation. |
| Implementation plan | Written plan that documents all the tasks related to programme implementation from “rollout” forward (e.g. the kick-off event, newsletter mailings, conferences). This plan differs from a research or development plan that documents tasks prior to rollout (e.g. researching the target audience, concept testing, getting a buy-in from stakeholders). |
| Incremental costs | Scheduled costs for planning, implementing, and evaluating a social marketing programme (e.g. replacing worn-out equipment, producing programme materials, setting up call centres, etc.). |
| In-depth personal interviews | A qualitative research method that involves a one-on-one discussion between an interviewer and a respondent about selected topics. The structure and interviewing style are less rigid than in quantitative, interviewer-administered surveys. |
| Indicator | A single, specific measure of a general concept. For example, “number of days that you smoked during the last 30 days” is an indicator of smoking behaviour. Researchers often use several indicators to represent a complex concept such as behaviour. |
| Influencing (or secondary) audience | A group of individuals that can help reach or influence the primary target audience (see Primary target audience) and is not considered part of the problem. Secondary audience(s) should be identified through profiles created for the primary audience(s). They are indirectly affected by a health problem (e.g. employers who lose money because of workplace injuries) and/or those able to affect causal factors or influence target audience members. “Influences” can be family members, teachers, peer opinion leaders, policy makers, etc. |

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| Interpersonal channel | A communication channel that involves the dissemination of messages through one-on-one communication (e.g. mentor to student, friend to friend, pharmacist to customer). |
| Intervention activities | Methods used to influence, or facilitate to promote behaviour change (e.g. holding training classes to help seniors start their own walking clubs, developing a website to promote drug-free activities to youth, expanding clinic hours to improve working mothers' access to HIV testing). |
| Key informants | Persons or organisations whose opinions can be seen as representative of a community or target audience because of their experience or expertise with the target audience. |
| Kick-off | Start date for the public portion of a health communication effort; after the internal, preparatory work is complete, this often includes an announcement or event such as a news conference, health fair publicity or a programme registration drive. |
| Market research | Research designed to enhance your understanding of the target audience's characteristics, attitudes, beliefs, values, behaviours, determinants, benefits and barriers (see Determinants of behaviour, Benefits and barriers) to behaviour change in order to create a strategy for social marketing programmes. Also called consumer or audience research. |
| Marketing strategy | A guiding plan of action for your entire social marketing programme. Market strategy encompasses the specific target audience segment(s) (see Target audience), the specific desired behaviour change goal, the benefits you will offer, and the interventions (see Product, Price, Place and Promotion) that will influence or support the behaviour change. Also known as the "marketing mix". |
| Mass-reach medial channel | A channel in which messages are disseminated to a larger number of people simultaneously using various media (e.g. radio, TV, newspapers, billboards). |
| Materials | Tangible products that contain the message to be delivered to the target audience (e.g. a brochure, a PSA tape, or a script for an oral presentation). |
| Media advocacy | Using the mass media strategically to advance a social or policy initiative. Initially, the goal of medial advocacy must be determined. Then a story needs to be developed based on facts and values and made meaningful to a clearly |

defined target audience so that it can attract attention and precipitate specific action.

Media kit

A package (usually a folder) that includes items explaining a programme or health issue which is given to the media. May include such items a pamphlets, press releases, contact information, and/or camera-ready copies of materials.

Media relations

The management of communication between an organisation and its publics, primarily through mass media outlets.

Media tracking

The monitoring of radio, television, and print media over a specific period of time for a specific topic or message. Data gathered can be analysed for content or trends in amount of coverage.

Medium

Any media class used to convey a message to the public (e.g. billboards, neighbourhood publications, point-of-purchase displays).

Message

The memorable, explanatory words or images that capture a health communication concept. Messages are the actual words or images that communicate what you want people to know, feel, or do.

Message source

The person or entity to whom a message is attributed.

Message variables

Message qualities (i.e. style, tone, type of appeal, and message source) that can best facilitate change for the target audience in the settings identified.

Moderator's guide

A set of questions, probes, and discussion points used by a focus group moderator to help him/her facilitate the group. A guide can also contain reminders for which questions are most important to the research to help the moderator use the discussion time effectively.

Monitoring and feedback

Process for tracking programme implementation and audience response. Includes assessments of whether materials are being distributed to the right people and in the correct quantities, the extent to which programme activities are being carried out as planned and modified if needed, and other measures of how and how well the programme is working. Also measures the extent to which members of the target audience are exposed to programme components. Also measures the audience's response to the programme, including their feelings and perceptions about it, and whether they attended and understood an activity or message.

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| Morbidity | Rate of disease, infirmity, or disability. |
| Mortality | Rate of death. |
| Motivators | Factors that help prompt or sustain knowledge, attitudes, or behaviours for a target audience. |
| Multivariate psychographic characteristics | A set of variables that describes an individual in terms of overall approach to life, including personality traits, values, beliefs, preferences, habits, and behaviours. Psychographics are not usually related to health-specific issues, but more commonly to consumer- or purchase-specific behaviours, beliefs, values, etc. |
| Negative appeal | A message that is focused on negative consequences rather than rewards or benefits. |
| Nonrecurring costs | Costs associated with planning, implementing, and evaluating a health communication effort that are due once (e.g. speaker's fee for a one-time presentation). |
| Objectives | Statements describing the intended results of a programme and the manner in which these results will be achieved. Objectives should be specific, measurable, achievable, relevant and time-bound. |
| Observational study | A study where individuals are observed in a natural setting with minimal observer interaction (e.g. observing shoppers in a grocery store to see if they are reading posted nutritional charts). |
| Op-ed | A letter, statement, or short essay submitted to a newspaper editor by a reader or representative of an organisation. These pieces are featured opposite the editorial page, hence the name "op-ed". |
| Open-ended questions | Questions worded to allow an individual to respond freely in his or her own words. |
| Organisational channel | A communication channel in which messages are disseminated at the organisational level (e.g., corporate newsletters, cafeteria bulletin boards). |
| Outcome evaluation | See Effects evaluation. |
| Partners | Individuals or organisations/agencies that contribute to the efforts initiated by a leader or head of an organisation/agency. Partners can have a variety of roles (e.g. contribute research data, share the evaluation experience, help to spread the health message). |

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| Pilot-testing | Implementing and evaluating the programme or its components in a limited area for a limited amount of time at a point when you can still make programme adjustments based on the pilot experience. |
| Place | One of the 4Ps of marketing. Place is where and when the target audience will 1) perform the desired behaviour, 2) access the programme's products/services, or 3) be thinking about your health or safety issue. |
| Positioning | How your audience perceives and feels about the behaviour change and the associated benefits, products and services you are offering in relation to competing behaviours, products and services. You will want your audience to view the behaviour change as more beneficial, with fewer barriers, and done by more people they care about – more “fun, easy, and popular” – than competing behaviours. You can do this by simplifying and organising the benefits of your behaviour change or product/service in a way that is powerful and memorable to the target audience. Positioning is made tangible through the “brand”. (see Branding). |
| Positive appeal | A message that is focused on the benefits or rewards rather than the negative consequences. |
| Pretesting | A type of formative research that involves systematically gathering target audience reactions to messages and materials before they are produced in final form. |
| Prevalence | A measure of the extent of a disease or health problem in a population based on the number of cases (old and new) existing in that population at a given time. |
| Price | One of the 4Ps of marketing. Price refers to the financial, emotional, psychological, or time investment costs or barriers (see Barriers) that the audience members face in making the desired behaviour change. |
| Primary research | The process of collecting one's own data about the audience and health problem, from designing the method of data collection through to analysis and reporting on the new information. |
| Primary target audience | The group(s) of individuals that your social marketing programme seeks to reach and influence. This group is a selected portion (or segment) of a larger population that are directly affected by the health problem. |

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| Product | One of the 4Ps of marketing. Some social marketing programmes offer tangible products or services that facilitate a behaviour change. In others, a bundle of intangible benefits is offered to the audience in exchange for doing the desired behaviour. From a broader perspective, the behaviour change itself can be viewed as the product of the social marketing intervention. |
| Promotion | One of the 4Ps of marketing. Includes the communication messages, materials, channels (see Channels) and activities that will effectively reach your audience to promote the benefits of the behaviour change, as well as to describe the Product, Price and Place features of your programme. |
| PSA | Acronym for Public Service Announcement. PSAs are typically aired or published without charge by the media. Can be in print, audio, or video form. |
| Psychographics | See Multivariate psychographic characteristics. |
| Public domain | Materials or text that are not under copyright to any person or entity. These materials and text can be reproduced and used without obtaining permission from the producer or paying fees or royalties. Items produced by the federal government are frequently considered to be in the public domain. |
| Public relations | The methods and activities employed in persuading the public to understand and regard favourably a person, business or institution. |
| Qualitative research | Research that collects data that appear in words rather than numbers. Useful for gathering information about feelings and impressions. Focus groups and in-depth personal interviews are common types of qualitative research. |
| Quantitative research | Research designed to count and measure knowledge, attitudes, beliefs, and behaviours. Yields numerical data that are analysed statistically. Surveys are a common type of quantitative research. |
| Random sample | A sample of respondents in which every individual in the population has an equal chance of being included in the sample. |
| Readability testing | Applying a formula to written materials to predict the approximate reading grade level a person must have achieved in order to understand the material. |

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| Recall | The extent to which respondents remember seeing or hearing a message that was shown in a competitive media environment. Usually centres on main idea or copy recall. |
| Recurring costs | Costs for planning, implementing, and evaluating your programme that occur at regular intervals (e.g. salaries, utility bills, rent, etc.). |
| Saturation | Achievement of a message gaining wide coverage and high frequency designed to achieve maximum impact. |
| Screenner | An instrument containing short-answer questions used in the recruitment process for research methods such as focus groups and central location intercept interviews. Interviewees' answers to the questions determine who is and is not eligible to participate in the research. |
| Secondary audience | See Influencing audience. |
| Secondary research | Research that involves obtaining, synthesising, and analysing existing data about the problem and/or population. |
| Segmentation | The process of dividing a target population group into homogeneous subsets of audience segments based on some common factors related to the problem, usually risk, behaviours and behaviour determinants (see Determinants of behaviour). Psychographic factors (see Multivariate psychographic characteristics) and demographics help define a segment as well. |
| Self-administered questionnaires | Questionnaires that are filled out by respondents. These can be distributed by mail, handed out in person, or programmed into a computer to enable respondents to enter answers electronically. |
| Setting | A location or environment where the target audience can be reached with an intervention activity or message (e.g. a grocery store is a setting where audience members can be reached with a new product like a healthy recipe cookbook; a beauty salon is a setting where audience members can be reached and peer education; the workplace is a setting where audience members can participate in exercise activities). |
| Sigma encoding | A process in which an electronic device is attached to each videotape copy of a public service announcement sent to television stations. When the PSA is aired, a signal is sent to |

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| | a central location where records are kept on when, where, and how often the PSA appears. |
| Small group channel | A communication channel in which messages are disseminated at the small-group level (e.g. meetings on health topics, cooking demonstrations, group counselling, etc.). |
| Social determinants of health | Social determinants of health (SDOH) are factors and resources essential to the health of communities and individuals. These include income, shelter, education, access to nutritious food, services, community norms and cohesion, and social justice. |
| Social marketing | The application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programmes designed to influence the voluntary behaviour of target audiences (see Target audience) in order to improve their personal welfare and that of their society. Social marketing-driven programmes, which incorporate more than messages (see Message), include components commonly referred to as the “4Ps: Product, Price, Place and Promotion. |
| Stratify | To arrange the population at large into population groups that can be targeted for an intervention. |
| Style | A message quality that can be tailored to one’s target audience(s). This is a general term that refers to such issues as presenting cartoon figures vs. detailed graphs, or using flowery, embellished text vs. short or pithy text. |
| Summative evaluation | See Effects evaluation. |
| Sunk costs | Costs for planning, implementing, and evaluating your programme that have already been expended and cannot be recovered. |
| Surveillance | The continuous or routine monitoring of health- and safety-related beliefs, attitudes, behaviours and health outcomes at regular intervals over time. |
| Talking points | Prepared notes used by a speaker to guide his or her presentation. |
| Target audience | The group(s) of individuals that your social marketing (see Social Marketing) programme seeks to reach and influence. This group is a selected portion (or segment) of a larger population that are directly affected by the health problem. The <i>primary audience</i> is a group who you want to see |

make behaviour changes. The secondary audience consists of individuals who can exert influence on the primary audience. Your interventions may target one or both audiences.

Theatre testing

A research method in which a large group (60-100, sometimes up to 300) is gathered in a theatre-style setting to view and respond to audiovisual materials such as commercials or PSAs. Control audiovisual materials are also shown to lend realism and help check how memorable the materials being tested are in comparison.

Theory-based evaluation

Evaluation that shows how each a specific programme activity is linked to a corresponding programme effect.

Tone

A message quality that can be tailored to one's target audience(s). This term refers to the manner in which a message is expressed (e.g. a fatherly tone, an alarming tone, a friendly tone).

Variable

A characteristic of an object of measurement that can take on a range of values. Examples of variables are height, test scores, and gender.

Variable costs

Costs for planning, implementing, and evaluating your programme that change with the size of the programme (e.g. printing costs vary by the size of the order.).