

Social marketing benchmark criteria

The benchmark criteria are eight key elements that are included in successful social marketing interventions.

Building on Alan Andreasen's 2002 six-point criteria¹, they are designed to:

- Support better understanding of core social marketing concepts and principles
- Promote a consistent approach to review and evaluation
- Assist in the commissioning of social marketing services

The benchmarks were selected by reviewing successful social marketing projects and identifying the common elements that contributed to their success. The benchmarks are not a social marketing process, but the elements that can improve the impact of a social marketing intervention. Other factors, such as strategic planning, partnerships, stakeholder engagement and monitoring and evaluation, are also important. The benchmark criteria are set out, along with planning advice and tools, on the The NSMC's online *Planning guide and toolbox*, available at www.thensmc.com.

The benchmark criteria are not designed to be a simple tick-box checklist. Instead, they are a set of integrated concepts. For example, *insight* should evolve from the *customer orientation* work and *exchange* should be illustrated in the 'price' element of the *methods mix*. The links between the benchmarks are highlighted in the table.

1. Alan Andreasen, 'Marketing Social Marketing in the Social Change Marketplace', *Journal of Public Policy & Marketing*, Vol. 21 (1) Spring 2002, 3–13

1. BEHAVIOUR

Aims to change people's actual behaviour

- The intervention is focused on influencing specific behaviours, not just knowledge, attitudes and beliefs
- Clear, specific, measurable and time-bound behavioural goals have been set, with baselines and key indicators established

2. CUSTOMER ORIENTATION

Focuses on the audience. Fully understands their lives, behaviour and the issue using a mix of data sources and research methods

- Goes beyond interviews and focus groups to use ethnographic techniques as well
- Uses a range of research analyses and combines data from different sources (qualitative and quantitative)
- Gains key stakeholder understanding and feeds it into methods mix (Benchmark 8) development
- Interventions are pre-tested with the audience
- Involves the target audience and local community, rather than treating them as research subjects

3. THEORY

Uses behavioural theories to understand behaviour and inform the intervention

- The theory, or theories used, are identified after conducting the customer orientation research
- Appropriate behavioural theory is clearly used to inform and guide the methods mix (Benchmark 8)
- Theoretical assumptions are tested as part of the intervention pre-testing

4. INSIGHT

Customer research identifies 'actionable insights' – pieces of understanding that will lead intervention development

- A deep understanding of what moves and motivates the target audience, including who and what influence the targeted behaviour
- Insight is generated from customer orientation work (Benchmark 2)
- Identifies emotional barriers (such as fear of testing positive for a disease) as well as physical barriers (such as service opening hours)
- Uses insight to develop an attractive exchange and suitable methods mix (Benchmarks 5 and 8)

5. EXCHANGE

Considers benefits and costs of adopting and maintaining a new behaviour; maximises the benefits and minimises the costs to create an attractive offer

- Clear and comprehensive analyses of the perceived/actual costs versus perceived/actual benefits
- Considers what the target audience values: offers incentives and rewards, based on customer orientation and insight (Benchmarks 2 and 4) findings
- Replaces benefits the audience derives from the problem behaviour and competition (Benchmark 6)
- The exchange offered is clearly linked to 'price' in the methods mix (Benchmark 8)

6. COMPETITION

Seeks to understand what competes for the audience's time, attention, and inclination to behave in a particular way

- Addresses direct and external factors that compete for the audience's time and attention
- Develops strategies to minimise the impact of competition, clearly linked to the exchange offered (Benchmark 5)
- Forms alliances with or learns from the competing factors to develop the methods mix (Benchmark 8)

7. SEGMENTATION

Avoids a 'one size fits all' approach: identifies audience 'segments', which have common characteristics, then tailors interventions appropriately

- Segmentation is drawn from the customer orientation and insight work (Benchmarks 2 and 4)
- Does not only rely on traditional demographic, geographic or epidemiological targeting
- Draws on behavioural and psychographic data
- Identifies segment sizes
- Segments are prioritised and selected based on clear criteria, such as size and readiness to change
- Interventions in the methods mix (Benchmark 8) are directly tailored to specific audience segments

8. METHODS MIX

Uses a mix of methods to bring about behaviour change. Does not rely solely on raising awareness

- Uses all elements of the marketing mix (product, price, place and promotion) and/or primary intervention methods (inform, educate, support, design and control)
- Promotion is used to 'sell' the product, price, place and benefits to the target audience, not just to communicate a message
- Takes full account of existing interventions in order to avoid duplication
- Creates a new brand, or leverages existing brands appropriate to the target audience
- Methods and approaches are financially and practically sustainable