Getting Started

Generating usable customer insight and scoping a social marketing project

Designed & Facilitated by Brilliant Futures for the National Social Marketing Centre

Warrington, 19th May
A scoping tool box

1. What to Do
2. How to Do It – Templates
3. ‘Help’

Optional Coaching through the process

Scoping Report
Setting The Scene

Why Scoping, Where Does It Fit In?
Defining Our Challenge
Setting the Scene

• Investment in scoping our project is critical to ensure the intervention has an impact with the target audience

• Scoping helps to ensure the intervention is consumer insight driven and clear behavioural goals that are SMMMARRRTTT and therefore likely to be achieved, are set

• Scoping helps deliver world class commissioning

• Can take any amount of time but allow at least 2-4 months for this element of the process
Scoping and the 8 Benchmark Criteria

1. Customer orientation
2. Clear focus on behaviour
3. Informed by behavioural theory
4. Insight – what moves/motivates?
5. Exchange – increase benefits/reduce barriers
6. Competition – internal/external
7. Segmentation – targets specific audience
8. Mix of methods – information/services
Scoping to Develop a Social Marketing Mix
Making ‘a pact’ with our audience – a two way process

- Audience
- Proposition
- Access
- Communication

Together With

Cork, 2008
Mapping our Journey

Where do we want to be?

How are we going to get there?

Where are we now?
8 Steps to a Scoping Report

Challenge → Resources → Situation

Behaviour ← Stakeholders ← Audience

Develop A Mix to Test → Planning
Define the Challenge

Challenge
The Gap between the desired behaviour and reality

• What is happening? – The issue (epidemiology, demographics) – who is doing what?
• Why is this happening?
• Who is this a problem for?
• Why is it a problem?
• What targets / policy affects this issue?
• What is the opportunity?
• What will be the benefits of this, for who?
• What are our SMART objectives to achieve this desired situation?
Defining the Challenge

What is the problem? – *What is / isn’t happening? where is it happening? why is it a problem?* – *what is the effect of the problem, what targets affect it?*

Who is affected by the problem? – *Who are the target audience that we need to help?* – *where is the highest incidence or seriousness of the problem?*

**Challenge Statement:**
Who is our target audience?

- Policy People (Enablers / Preventers)
- Professionals (Facilitators)
- Influencers (e.g., family, peers)

Audience (Behavers)
External & Internal Analysis
Establish a resource ready project team

Resources

- Set up project group
- Finance – available, potential, partnerships
- People – skills, experience, knowledge, interest
- Communications & Feedback Planning
- Infrastructure, capital (buildings, services, systems)
- SW of SWOT
**Swot Analysis**

**Strengths**

(Knowledge, skills, experience, resources, systems, communications, infrastructure, management buy in...)

**Weaknesses**

(Knowledge, skills, experience, resources, systems, communications, infrastructure, management buy in...)

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Assess and analyse the situation

**Situation**
Looking at the external ‘world’ around the issue

- Environmental analysis (PEST…)
- Policy drivers
- What else is happening in this area – what is working / has worked and what has not
- Best practice examples
- Competitor Analysis
Environmental Analysis Plus……

Political + Economic + Social / Cultural / Lifestyle + Technological

Wider Determinants (education, housing, culture, infrastructure….)
swOT Analysis

Opportunities

*(how can we make the most of the environmental factors and our strengths)*

Threats

*(What do we need to overcome, what might threaten changed behaviour and how can we minimise weaknesses?)*
Literature – Review and Learn

What?
(Project, research findings)

Source & Contact details

What Learn?
(The good and the bad…Outcome, Impact, Process, ROI)

Positives & Negatives
(What do we want to repeat / avoid?)

So?
What does this mean for our project?
The Audience

Research Methods & Process
Research the audience

Audience
An analysis of the audience and their world
Who... what are they doing... why, what makes them tick?

Generating Insight

- Demographics
- Behavioural
- Lifestyle, value and attitudes – motivators.
- Influencers
- Competitors
- Segmentation
- Generating insight
Research Methods - Terminology

Primary

‘For the First time’
new or original research commissioned / carried out by you.

Secondary

‘For the second time’
Existing research by someone else, desk research, statistics, census, geodemographic profiles
Research Methods - Terminology

Quantitative

- Quantity driven, statistically valid. The what, how often, how many
- E.g. surveys (web, post, face to face, telephone), questionnaires, observation, tracking studies

Qualitative

- Provides in-depth understanding.
- They why behind the what...
- e.g. focus groups, interviews, facilitated workshops, diaries, user panels, observational, forum drama, video diaries, shared web dialogue, forums
Create A Picture of Your Audience

- Beliefs
- Attitudes
- Knowledge? Facts? Where from?
- Benefits & Buts
- Barriers
- Motivations
- Aspirations
- Feelings
- Values
- Fears
- Who & what influences?
- What Do?
- Where Go?
- Demographics
- Geographical
- Epidemiology
- Behavioural

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Writing a Research Brief

1. Background to the project (challenge, existing research)
2. Objectives and purpose of research
3. Target audience
4. Suggestions for methodology (quantitative or qualitative)
5. Reporting requirements
6. Company requirements – evidence of previous work
7. Additional input required – e.g. trends information, agency ideas for additional research
8. Geographical framework
9. Indication of budget
10. Timings
11. Contact details
Developing Segments

Research

Sub-segment:

Behaviour: _____________________________
________________________
_____________________

Values / Motivators: _____________________________
________________________
_____________________

Benefits Sought: _____________________________
________________________
_____________________

Costs to change / do new behaviour: _____________________________
________________________
_____________________

Channels to reach: _____________________________
________________________
_____________________

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Audience Journey Map

*Plot your audience’s journey to existing help / service, where do they go, who helps them on the way, where do they get information from? Who is competing? where might they encounter obstacles?*
Learning From Competitors

Knowing what our competitors are doing and why our audience are choosing their behaviours over ours is critical to success. With knowledge we can make our enemies our friends.

<table>
<thead>
<tr>
<th>Who?</th>
<th>What Are They Doing Well That We Can Learn From?</th>
<th>What Benefits Do They Offer Our Audience?</th>
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The Audience

What Do We Need to Know and How Will We Find It Out?
# Building The Picture

## Demographic & Geographic

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<tr>
<th>Censuss</th>
<th>ONS</th>
<th>Mosaic</th>
<th>Cameo</th>
<th>Acorn</th>
<th>People &amp; Places</th>
<th>Personicx Geo &amp; Personicx Household</th>
<th>Commercial Data</th>
<th>- e.g. shopper loyalty cards (Tesco, Boots, Nectar)</th>
<th>Public Health Observatories</th>
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</table>

## Behavioural

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<tr>
<th>BMRA &amp; MRS</th>
<th>Partner commercial firms</th>
<th>Trade organisations</th>
<th>Market intelligence reports – Keynotes, Mintel</th>
<th>Other professionals – forum, one-stop shop</th>
<th>Healthy Foundations</th>
</tr>
</thead>
</table>

## Psychographic

<table>
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<tr>
<th>Social Research Association</th>
<th>Partners’ research</th>
<th>Academic Institutions</th>
<th>Market intelligence</th>
<th>Other professionals – forum, one-stop shop</th>
<th>Healthy Foundations</th>
<th>Local commissioned research</th>
</tr>
</thead>
</table>
Digging Deeper for Genuine Insight

Ensure your research methodology fits with your target audience and requirements. Creative research methodologies can be used to engage hard to reach audiences and get true insight into feelings, attitudes, beliefs and motivations.

• Interviews (paired interviews can be successful with young people).
• Focus Groups
• Surveys – Web / Post / Face to Face / Telephone
• Vox Pops / Video diaries
• Observational Research
• Shared web dialogue
• Facilitated workshops with creative techniques to dig deeper into consumer insight
• Forum drama can be effective to allow participants to test out potential interventions before they ‘go live’
Case Study

Creative Approaches to Generate Insight

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Aims of The Project

• Provide a tangible opportunity to build support in favour of baby-friendly attitudes, policies and practices within the city.

• Use a social marketing philosophy and techniques to find out how to help facilitate breast feeding in public places and for mothers returning to work.
Consultation Objectives

- Gain an accurate national and local picture of current breastfeeding at work and in public places.
- Research successful engagement methodologies and interventions.
- Establish gaps in research to test locally.
- Segment local population into target audiences.
- Determine barriers to breastfeeding in public and work.
- Determine desired benefits by target audiences.
- Determine perceptions by members of the public.
Different Consultation Methods

- Different qualitative research methods were used to appeal to different audiences.
- Ensure we reached the traditionally hard to reach groups.
- Key focus was to ensure residents could ‘have your say, your way’
- Used creative techniques to allow people to step outside their comfort zone and voice ‘genuine’ thoughts, feelings and experiences
Full Scoping Activity to Gain Insight

Secondary Research, including literature review, best practice, case studies

City-wide Consultation:
Theme: Baby Friendly Brighton Hove with focused sections on breast-feeding in Public / At work

Targeted Consultation with segmented audiences


Stakeholder Consultations to gain insight and establish behavioural goals and design interventions

Recommend activities, policies and practices
Interactive ‘Wiki’ webspace providing online web survey and blog posting facility - over 1200 hits to date.
Creative Workshops

10 Creative workshops with mothers, older people, influencers and general public, giving them chance to ‘have their say, they way’
A mobile ‘dialogue’ was created
‘Big Brother’ style diary-room

Videoqube at Churchill Square shopping centre, generating over 4 hours of tape from in excess of 50 interviews
Postcard with perforated ‘help’

9000 postcards distributed through retailers, cafes, childrens’ centres, leisure centres and various other baby-friendly venues, plus door drop to 2000 family orientated households
**Key Findings**

‘Who wants to eat in a toilet? Shopping malls and shops don’t provide enough appropriate places to breastfeed but non-commercial facilities are also needed.

Social & cultural views & family influences act as a barrier to breastfeeding. ……
Positive role models are needed, particularly for younger mothers and mothers from lower socio-economic groups

Breastfeeding support groups and professionals can be perceived as over-zealous and alienating.

Mutual respect is an important issue – breastfeeding should be done in a way that is respectful to other members of the public. …
Mothers need help to develop the confidence to breastfeed in public and to be able to do it discreetly.
Key Findings Cont...

Communication is needed to highlight the benefits of supporting breastfeeding in public to consumers. And employers need to be made aware of the benefits to themselves of supporting employees who are breastfeeding.

Any policies or practices that are developed must respect the sensitivities and feelings of people who are not comfortable with breastfeeding in public – both breastfeeding mothers and the public.

There is a need for a directory of breastfeeding friendly cafes, pubs, restaurants and other venues.

Employers don’t provide places at work for breast milk to be expressed and stored... And nurseries should receive funding support to provide appropriate storage for expressed breast milk.
Where Next?

- Recommendations were made, based on the insights found and further consultation with stakeholders.

- The findings and recommendations are now being incorporated into the city’s childhood obesity strategy and breastfeeding strategy.

- The strategy will encourage and enable mothers of all ages and from all socio economic groups to breastfeed with confidence, respect for others and in a way that suits them both in public and when they return to work.
## Research to Generate Actionable Insights

<table>
<thead>
<tr>
<th>What do I Know?</th>
<th>What Do I Need To Know?</th>
<th>How Will I Find Out?</th>
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<tbody>
<tr>
<td>Epidemiology</td>
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<tr>
<td>Demographics</td>
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<tr>
<td>Behaviour</td>
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<tr>
<td><strong>Psychographics</strong></td>
<td>(knowledge, attitudes &amp; beliefs, motivations, values, fears, benefits sought, barriers, influencers – who &amp; what)</td>
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Stakeholder Engagement & Communication
Identify and engage stakeholders

**Stakeholders**
Identifying and engaging partners to increase impact and sustainability of project

- Who do we need to engage?
- Indirect & direct stakeholders
- Why – what can they offer us –insight, resources, channels?
- What can we offer them?
- How to engage?
- Evaluation requirements
- Prioritising stakeholders
- Communicating with stakeholders
- Add to SW of SWOT
Stakeholder Universe

Regional Influencers
e.g. Government Offices, SHAs

National Influencers
e.g. DH / DCFS / National Charities / National Retailers

Local Influencers
e.g. schools, faith groups, community groups, local charities / vol organisations, councils, workplaces, PCT, GP

In Audiences’ World
e.g. family, friends, social networks, colleagues,
Starting a Stakeholder Matrix for Chlamydia Screening

- Nurses
- Youth Workers
- Commissioners
- GPs

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<th>Interest -</th>
<th>Interest +</th>
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<tr>
<td>Influence -</td>
<td>Influence +</td>
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The Stakeholder Sell-In – ‘WIIFM?’

How can we ensure we have the buy in of our sales force and give stakeholders, partners and our audience what they want?

<table>
<thead>
<tr>
<th>Who?</th>
<th>Why? (What Do We want – What’s In It for Us?)</th>
<th>What Do They Want?</th>
<th>How can we give it to them?</th>
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Planning

Considering Time, Budgets, People & Processes
Plan for success

Planning

How are we going to deliver our proposal?

- Timeline
- Budget
- People
- Evaluation Plan
- Communications Plan
# Sample Research Timeline

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<tr>
<th></th>
<th>Weeks</th>
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<td>1   2 3 4 5 6 7 8 9 10 11 12 13 14 15 16</td>
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<tr>
<td>Preparation of brief</td>
<td>x   x</td>
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<tr>
<td>Define audience / sample</td>
<td>x   x</td>
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<tr>
<td>Carry out research</td>
<td>x   x x x x x x x x</td>
</tr>
<tr>
<td>Collate / input research</td>
<td>x   x</td>
</tr>
<tr>
<td>Analysis of results / findings</td>
<td>x   x</td>
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<tr>
<td>Preparation of report / communicate</td>
<td>x   x</td>
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# Scoping Action Plan

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<th>What - SMART</th>
<th>By Who</th>
<th>By When</th>
<th>Help / Resources Needed</th>
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