About USAID Advancing Nutrition
USAID Advancing Nutrition is the Agency’s flagship multi-sectoral nutrition project, led by JSI Research & Training Institute, Inc. (JSI), and a diverse group of experienced partners. Launched in September 2018, USAID Advancing Nutrition implements nutrition interventions across sectors and disciplines for USAID and its partners. The project’s multi-sectoral approach draws together global nutrition experience to design, implement, and evaluate programs that address the root causes of malnutrition. Committed to using a systems approach, USAID Advancing Nutrition strives to sustain positive outcomes by building local capacity, supporting behavior change, and strengthening the enabling environment to save lives, improve health, build resilience, increase economic productivity, and advance development.

Disclaimer
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Cover photo: Cherries for fruit paste at a woman-owned food processing company in Haiti. Photo by Patrick Adams/RTI International.

USAID Advancing Nutrition
JSI Research & Training Institute, Inc.
2733 Crystal Drive
4th Floor
Arlington, VA 22202

Phone: 703–528–7474
Email: info@advancingnutrition.org
www.advancingnutrition.org
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This guidance is also a reflection of best practices and opportunities that were shared during in-depth interviews and content reviews from USAID implementing partner staff including Alice Iribagiza, Feed the Future Rwanda Orora Wihaze Activity; Ojochennemi Mercy Jibrin, Feed the Future Bangladesh Nutrition Activity; Ataur Rahman, Bangladesh Nutrition Activity; Ivy Blackmore, Feed the Future Fish Innovation Lab; Lora Ianotti, Fish Innovation Lab; Patricia Poppe, Center for Communication Programs; and Claudia Nieves, Center for Communication Programs. We used their contributions, including the quotes below, to tailor this guide to USAID partners who are seeking to generate demand for healthy diets.

FROM OUR IMPLEMENTING PARTNERS

“"We collected data and did qualitative research, looking at infant and young children feeding practices within the populations we studied. We looked at the limitations and challenges households faced, to focus on how our interventions can play off the strengths and navigate the challenges. To create demand, we must understand our audience. Change within a community is not a rapid process; it comes slowly and evolves constantly.""

“"To generate demand for healthy diets, you need to show people what’s in it for them. This key piece is often overlooked.""

“"Marketing is a science. It involves more than just getting a message out. Often we think, ‘If messages are there, why can’t we go and get a radio slot and just say it?’ To be effective, marketing needs to be integrated with social and behavior change (SBC) principles.""

“"Our staff works as a team, and each member is responsible for every project. Technical leads [from SBC, Nutrition, and WASH] guide our interventions, which are implemented by experts in nutrition, marketing and development, and SBC. Each team member contributes in order to ensure successful project outcomes.""
<table>
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<tr>
<th>ACRONYMS</th>
<th>Description</th>
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<td>Brand and Marketing</td>
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<tr>
<td>CHW</td>
<td>community health worker</td>
</tr>
<tr>
<td>CLA</td>
<td>collaborating, learning, and adapting</td>
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<td>CTA</td>
<td>call to action</td>
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<td>IP</td>
<td>implementing partner</td>
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<td>MEL</td>
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<td>NOURISH</td>
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INTRODUCTION

What Is Demand Generation and Why Should Nutrition Activities Care about It?

Increasing consumer demand for safe and nutritious foods is key to improving global nutrition. While many program planners and implementers understand the importance, demand generation can feel like guesswork: Which group of people should I engage? Which approach is most convincing and sustainable? And which channels and activities should be prioritized within a limited budget? While a degree of judgment will always be necessary, program planners and implementers can improve demand generation effectiveness by considering how effectively their efforts meet marketing quality standards.

This guide supports nutrition program planners by defining, describing, and explaining the process of developing high-quality programs to market healthy diets. This knowledge enables teams to make informed marketing decisions, create strong marketing campaigns, and diagnose and solve marketing challenges. The guide is grounded in real-world experiences. It combines social and commercial marketing best practices with firsthand experience—challenges and solutions—from partners who are actively working to improve nutrition outcomes by creating demand for healthy diets.

We recommend that users of this guide download the file and then open it in Adobe Acrobat Reader; this will ensure full functionality of internal hyperlinks.
This guide builds on the Brand and Marketing (BAM) Best Practices framework (Annex 1) in two ways:

1. It outlines a “Funnel of Marketing Excellence” that helps program planners and managers, especially those leading the marketing work, understand and advocate for marketing quality standards. For example, the guide begins with the end in mind by describing the three marketing musts that all marketing programs must achieve to be successful. It then works backward, identifying the marketing quality standards that contribute to successful programs; the activities to achieve these quality standards; monitoring, evaluation, and learning (MEL) considerations; and conditions that support high-quality marketing activities.

2. It outlines a set of actions that help implementers understand how to achieve marketing quality standards. For example, the guide walks program managers through the process of understanding and identifying audiences and developing a brand and creative strategy, using real-world nutrition and healthy diets programs from the public and private sectors as examples.
The Opportunity: Using Demand Generation to Improve Diets

USAID and its partners improve the supply and consumption of healthy foods from farm to fork, but efforts to consider consumer demand as an approach to improve consumption have been limited. Private sector actors use sophisticated techniques to promote products based on customers’ perceptions, values, and emotions. However, private sector partners have less incentive to promote healthy foods among low-income populations, because lower prices mean smaller profit margins.

Public sector actors have an obligation to generate demand for healthy foods in low-income, vulnerable communities. However, they may feel that these settings do not require private sector techniques. As a result, they fall back on using education techniques to simply tell people what is healthy or good for them. USAID implementing partners (IPs) lack tailored guidance for marketing foods that make up a healthy diet. To help fill this gap, this guide combines learning from the Brand and Marketing Best Practices Framework and experiences from four IPs to generate demand for healthy diets.

The goal may range from motivating consumers to purchase or acquire and eat certain safe, nutritious foods—or a range of these foods—or to purchase or acquire and eat less highly or ultra-processed foods. IPs may also have a goal of working with vendors or producer organizations considering ways to better market their products to build demand.

The Intended User and Ways to Use

Program planners, managers, and implementing teams whose activities aim to promote healthy diets can use this guide as a trusted companion to design demand generation efforts, monitor progress, learn from implementation and acquired data, and adapt marketing efforts accordingly.

You can use this guide to direct newly awarded activities that take into account ways to improve nutrition outcomes through demand generation. You can also use it in more mature activities that are undergoing mid-project adaptations.

The guide includes worksheets, notes sections, deliverable templates, and inserts. Use your digital or soft copy to bookmark or dog-ear your favorite pages, write or doodle out your thoughts, and highlight sections that inspire you.

Each activity should use this guide in the way that best suits their needs. Activities can work through this guide sequentially or an activity can select relevant modules, activities or worksheets, depending on their needs and expertise. Additionally, this guide can be picked up throughout the life of the activity, as different components of the guide become useful.

Structure of the Guide

The guide starts by using the “Funnel of Marketing Excellence” to describe what success means and what it takes to achieve. It then moves through three programming steps:

1. Getting to know your audience
2. Developing your campaign
3. Creating your brand identity

Each programming step provides—

- an overview, including learning objectives
- expected outputs
- time and human resources needed to complete the step
- how-to guidance with tips, resources, and worksheets to help designers and implementers approach norms responsive interventions
- marketing examples selected to illustrate a particular point in the process rather than the overall marketing strategy (and that may not always demonstrate improved nutrition outcomes in the contexts that USAID prioritizes).

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1. The Brand and Marketing Best Practices work includes a framework, case study series, summary of learning from the private sector, marketing definitions, and final reports and recommendations to support global health and development practitioners.
As previously mentioned, this guide is modeled using the BAM Best Practices developed by Mann Global Health. The 18 BAM Best Practices are woven into this guide in order to provide a comprehensive overview of how to generate demand for healthy diets. The following is the list of best practices (a more in depth explanation of each of the BAM Best Practices can be found in Annex 1):

All of the 18 Best Practices are incorporated in some way within the guide, whether included as an entire section, such as Understanding the Audience and Developing a Brand Identity, woven into sections, such as Touch the Heart, Open the Mind, and Delight the Audience, or sprinkled throughout the whole guide, such as People and Capacity and Evaluation.

**18 BEST PRACTICES**

1. Identify the Audience and Behavior Change Objective
2. Understand the Audience
3. Articulate an Insight
4. Define the Brand Vision
5. Develop the Brand Identity
6. Communicate a Benefit
7. Touch the Heart, Open the Mind
8. Select Marketing Vehicles and Ensure Message Continuity
9. Delight the Audience
10. Inspire Audience Engagement
11. Test Message Effectiveness
12. Evaluate Program Results
13. Measure Brand Performance
14. Evaluate Marketing Vehicle Effectiveness
15. Organizational Structure
16. Processes and Decision-Making
17. People and Capacity
18. Rewards and Incentives
FUNNEL OF MARKETING EXCELLENCE

Beginning with the End in Mind

At the very least, a successful demand creation initiative must be noticed, processed, and linked (remembered) (Sharp 2010) to the correct brand, campaign, food, or behavior.

This section of the guide explains these three “marketing musts” in further detail and identifies 10 quality marketing standards that increase the likelihood of a program’s success.

3 Marketing Musts

Effective marketing programs will—

1. **Be Noticed**: Most people are busy, and few people are preoccupied with the products, services, and behaviors that marketers promote. A large number of marketing activities therefore go unnoticed, despite marketing companies investing significant time and money in developing marketing campaigns and buying media.

2. **Be Processed**: Getting the audience to notice a marketing campaign is only the first step. The audience must also effectively process the campaign. Understanding—and ideally accepting—the message is critical.

3. **Be Remembered**: Having the audience remember marketing communication is important for two reasons. First, unless the communication is delivered at the precise moment the behavior is to be performed (e.g., handwashing messaging above a sink), the person must remember the message to perform the behavior. Second, the more often someone hears something, the stronger the message gets and the more likely they are to believe it. Surprisingly, most marketing communication is not linked to a message—and therefore cannot be remembered.

10 Marketing Quality Ingredients

Table 1 lists 10 quality ingredients that increase the likelihood of marketing success. It also shows the relationship between each of the ingredients and the three “marketing musts.” Following the table, we describe each quality component, including references to the appropriate best practices described in the BAM tool and the “how to” sections of this guide.

Now that you know the 3 “marketing musts” and the 10 quality standards that increase the likelihood of marketing success, the next step is to understand how to implement best practices to deliver high-quality marketing programs. This guide explains the “how to” for audience understanding, brand strategy, and communication strategy best practices. Guidance for measurement is included in each section.

Ethical marketing is about helping consumers make better and more conscious choices about what they buy. Anyone marketing healthy diets should ensure they are promoting or selling safe, reliable products or services in a fair, honest, and responsible way. Alternatively, unethical marketing emphasizes profit at the expense of everything else. Unethical marketing tactics include being dishonest with your customers, using scare tactics, or making unverified negative claims about competitors.

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2. An Australian study of advertising effectiveness determined that only 40% of ads are noticed (Sharp 2010).

3. The same Australian advertising effectiveness study cited above determined that among the 40% of ads that were noticed, only 40% were correctly identified (the respondents remembered what the ad was for), indicating that only 16% of the ads in the study were effective (Sharp 2010).
<table>
<thead>
<tr>
<th>QUALITY STANDARDS OF MARKETING SUCCESS</th>
<th>MARKETING MUSTS</th>
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<tr>
<td></td>
<td>NOTICEABILITY</td>
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<td></td>
<td>UNDERSTANDING</td>
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<tr>
<td>1. Distinctiveness</td>
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<td>2. Consistency</td>
<td>X</td>
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<td>3. Resonance</td>
<td>X</td>
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<tr>
<td>4. Presence of a clear and specific benefit</td>
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<tr>
<td>5. Contextual relevance</td>
<td>X</td>
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<tr>
<td>6. Believability</td>
<td>X</td>
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<tr>
<td>7. Touches the heart/opens the mind</td>
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<tr>
<td>8. Delight</td>
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<tr>
<td>9. Engagement</td>
<td>X</td>
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<tr>
<td>10. Placement when and where it matters*</td>
<td>X</td>
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</tbody>
</table>

* The best programs reach the audience while also placing the message at critical “moments of truth.”
1: DISTINCTIVENESS

Marketers seek differentiation; however, multiple products or messages often communicate the same information. (Think of all the toothpaste brands in a store or all the health messages people receive.) A brand or marketing campaign’s effectiveness depends on its degree of distinctiveness. Does it stand out from the competition and capture the audience’s attention?

Distinctiveness can be created through “brand identity” (i.e., the look and feel of a brand, program, or campaign) as well as through the message itself and the marketing approach. Consider the “Got Milk?” campaign that ran in the United States starting in the early 1990s. It was distinctive for its tagline (“Got Milk?”), approach (featuring celebrities), and look and feel (use of a milk mustache; iconic treatment of the words “got milk?”) (Daddona 2018).

2: CONSISTENCY

Consistency helps reinforce a message; people believe what they hear repeatedly. Consistency also helps people remember to perform a behavior. This is especially important if a marketing message does not occur when or where the audience is most receptive.

The “Got Milk?” campaign is a strong example of consistency. The campaign ran for almost 20 years, from 1995 to 2014.
3: RESONANCE

Program managers often think in terms of relevance, which is critical; but resonance is an even higher bar. “The challenge is to get past the brain’s screening mechanisms and to generate that little emotional reaction in the direction of acceptance: ‘I will pay attention to this’” (Sharp 2010).

The “Toss, Stir, Crumble” song and video that accompanied Knorr Nigeria’s Green Food Steps campaign is a strong example of resonance. The catchy song was written and performed by Yemi Alade, a popular Nigerian pop singer, and the video includes a fun party scene and hip dance that encourages people to act out the call to action (CTA). The entire marketing campaign has strong cultural resonance.

4: PRESENCE OF A CLEAR AND SPECIFIC BENEFIT

Presence of a clear and specific benefit: This part of the campaign answers “What’s in it for me?” The benefit must be deeply important to the audience for them to perform the desired behavior. If an idea is too complex, people will struggle to remember it; clarity and specificity help make a program understandable and memorable.

The USAID-funded Integrated Nutrition, Hygiene and Sanitation Project (NOURISH), which aimed to increase the consumption of small fish among children 6–23 months, provides a good example of a strong benefit that is clear, specific, and memorable for the audience (mothers): “Everyone loves the taste of small fish powder and it helps young children grow strong and smart” (Save the Children n.d.).

In contrast, many campaigns tell people what to do without explaining what’s in it for them. Consider the “5 A Day” campaign, which told people in the United States, United Kingdom, and France to eat five fruits and vegetables a day but lacked a clear and specific benefit.
5: CONTEXTUAL RELEVANCE

This is one of the most obvious and well-accepted quality standards. It includes considerations such as: Is the communication in the right language? Does it feature people who look and dress like the audience? Does it take social norms into account?

For example, the Feed the Future Rwanda Orora Wihaze activity team shared in an interview with USAID Advancing Nutrition that some of the images used in prototype testing were not relevant because they featured women wearing a style of earring that local women do not wear. After prototype testing, the project team corrected the style of earrings shown in the campaign to be more culturally accurate to the audience.

6: BELIEVABILITY

Some marketing programs fail because they are not believable. Sometimes program managers promise too much (e.g., increased sales, emotional benefit that seems unrealistic for the goal behavior) or the audience needs more information to believe the benefit.

The Grameen Danone social enterprise brand in Bangladesh, called Shokti Doi, “helps children grow up both physically and mentally” (Shokti Doi 2010).

This health benefit is backed up with a “reason to believe” (RTB) that explains how Shokti Doi helps children grow: It contains calcium, iodine, vitamin A, zinc, and iron.
7: TOUCHES THE HEART AND OPENS THE MIND

This is about inspiring the audience to think or feel differently, which is necessary to starting (or stopping) a behavior. Pret a Manger, a global, fast-casual restaurant chain, wanted customers to purchase more vegetarian meals. While there was strong interest among many consumers, many meat eaters thought vegetable-based meals did not taste good, stating that “only vegetarians would eat them.” To shift beliefs about vegetarian dishes and motivate meat eaters to try a vegetable-based meal, the company launched a campaign based on the idea that their vegetable dishes taste so good, even a true carnivore will want to eat them (Pret a Manger 2018).

8: DELIGHT

Audiences deserve to be delighted. “Delighting other people intrinsically appeals to our hearts. Thinking about and helping other people is central to ethics” (Denning 2011). However, feedback from stakeholders in the development sector indicates that audience delight remains an opportunity. One expert shared, “We can actually change people’s behaviors by delighting them in the process. We don’t always give ourselves permission to delight people. Sometimes we are too earnest or think that education is important even though we know that emotions are what drive behavior” (Pasquarelli 2021).

The “Toss, Stir, Crumble” song that is part of Knorr Nigeria’s Green Food Steps campaign provides a great example of audience delight. People want to sing and dance when they hear the song.
9: ENGAGEMENT

Engagement takes place on two levels. First, the audience must be interested. Something must make the audience notice the marketing program. This is similar to resonance.

The second level of engagement is deeper. Something must inspire the audience to participate. Participating will increase the likelihood of the audience buying into the behavior change and remembering the program or campaign. This is based on the findings of Les Binet and Peter Field, renowned marketing effectiveness experts, who conclude that “campaigns that emotionally inspire consumers to the degree that they share their enthusiasm with others ... are the most effective and efficient of all” (Binet and Field 2013).

Knorr Nigeria’s “Follow in my Green Food Steps/Toss, Stir, Crumble” campaign inspired strong audience engagement. The campaign had a catchy song and video that made people want to sing along and dance. The initiative also incorporated community events with mothers and daughters, including discussions about shopping for leafy vegetables, cooking demos and tastings, and cooking competitions (Lion et al. 2018).

10: PLACEMENT WHEN AND WHERE IT MATTERS

Program managers think about this when selecting media channels that are likely to reach the audience (e.g., radio programs, social media etc.). The best programs reach the audience while also placing the message at critical “moments of truth.”

In an article about behavior change for making healthy food choices, Chance, Gorlin, and Dhar (2014) state that “successful persuasive communication requires sending the right message at the time when the individual will be most receptive to it. Although an individual pursues many goals, only a small number are active at particular moment. Planners can time persuasive messages to coincide with ‘moments of truth’ in which the relevant goals are salient, or they can try to cue the relevant goals. A planner wishing to remind people to take the stairs might place signs next to or on the elevators, when people are thinking about their goal of getting upstairs. Stair prompts with messages such as ‘Burn calories, not electricity’ have been found to be highly effective, increasing stair use by as much as 40 percent, even 9 months later.”

Another example comes from Lifebuoy soap. The Lifebuoy team stamped over 2.5 million rotis (Indian flatbread) over the course of several weeks during a large pilgrimage and religious festival. As people started eating, they saw the message “Have you washed your hands with Lifebuoy soap?” (Lifebuoy 2016).
GETTING TO KNOW YOUR AUDIENCE AND THEIR BEHAVIORS

Many people think they know what they should be eating. We are constantly learning about nutrition and trying new foods to improve our health, and we are tempted to share this advice with others. However, changing people’s nutrition-related behaviors is more complex than we expect. Behavior is influenced by many factors, not just knowledge. Other factors that affect our dietary practices include our access to affordable and convenient foods, cultural norms that guide what we are expected to eat or not eat, and which foods our family members prefer (Michie 2011).

The varying recommendations for improving our diets can be overwhelming. Suggestions to “eat healthier” or “eat a balanced diet” are less clear or attainable than specific recommendations such as “add green vegetables to diets.” To generate demand for healthy diets, you must identify the specific behaviors for your program context that will make a difference in nutrition and that people are able to do. Once you determine specific behaviors, you can select your audience (i.e., who you want to adopt the selected behaviors).

The following sections will help you identify and refine the behaviors you want to change, as well as identify and refine your audience. Table 2 summarizes the related objectives, time involved, and necessary human resources, as well as the collateral output.
Selecting Behaviors and Specifying the Audience

A good marketing endeavor will have a clearly stated purpose, written as a behavior. Often, the desired behavior is to procure or use a particular product. It can also be to engage in a particular practice. Effective marketers outline the behavior for a specific group of people. The closer a marketer can come to meeting their audience’s specific needs and desires, the more successful their efforts will be.

At the core of any effective marketing endeavor is the specific behaviors the marketer wants someone to practice and the group of people who should practice that behavior. Therefore, the two most critical and interlinked first steps to generate demand for healthy diets are—

• defining or refining behavior
• deeply understanding the audience that should practice the behavior.

This section will support USAID IPs in identifying the behaviors needed to improve nutrition outcomes, prioritizing and refining the most important behaviors, and understanding the audience that should practice the behaviors. Following this approach will ensure that the most appropriate marketing tactics are used.

Table 2. Summary of Understanding the Audience

<table>
<thead>
<tr>
<th>OBJECTIVES</th>
<th>OUTPUTS</th>
<th>TIME</th>
<th>HUMAN RESOURCES</th>
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<tr>
<td>• Identify, prioritize, and refine nutrition behaviors.</td>
<td>• Persona Map</td>
<td>• Critical at the beginning of the project cycle, but should also be incorporated into ongoing collaborating, learning, and adapting (CLA) efforts.</td>
<td>• Social and behavior change (SBC) experts: To apply behavioral theory and marketing techniques.</td>
</tr>
<tr>
<td></td>
<td>• Draft research questions and tools</td>
<td>• Allocate 2–4 months for abbreviated key informant data collection or secondary data review.</td>
<td>• Monitoring and evaluation experts: To support formative research activities, ensure that behaviors are measurable, and develop indicators to track changes in behaviors and factors that affect behavior.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Nutrition and agriculture experts: To ensure that the behavioral design is technically sound and as evidence-driven as possible.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Community members and stakeholders: To help co-create and advise by validating research tools and findings and by suggesting behaviors.</td>
</tr>
<tr>
<td>• Identify barriers and facilitators to adopting selected behaviors.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Understand the audience’s current behaviors and the factors that influence their behaviors.</td>
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</table>
To refine the behaviors you want to encourage and to understand your audience, you should conduct formative market research—either primary or secondary. The Persona Map, shown in figure 1 and found in Annex 1 and Worksheet 1 (Persona Map and Audience Profile), helps structure your formative research to assist you in creating a demand generation strategy.

The Persona Map outlines areas of inquiry that will help IPs determine—

- what information is needed about the behavior and audience
- why it is needed
- how it can be used in generating demand for healthy diets.

Clicking on each area of inquiry on the interactive Persona Map worksheet will populate a list of questions that you can adapt to include in your market research guides. You can use the Persona Map to organize all the information about the desired behavior and primary audience. You can then use this information to develop your demand generation strategy.

The Persona Map gives IPs an organized method for gathering pertinent information about the primary audience and supporting actors in order to create an Audience Profile for each actor. An Audience Profile is shown in figure 2 and found in Annex 1 and Worksheet 1 (Persona Map and Audience Profile).

The following section of the guide prompts the IP team that is working to generate demand for healthy diets to ask themselves a series of questions in order to complete the Persona Map and Audience Profile.

Imagine that your initiative is to support market actors in increasing demand for healthy foods. Your team wants to get started on the marketing work and needs a tangible place to begin. A common place to start the conversation is to explore what to do. However, a better approach is to begin by asking what/why; for example:

“What exactly are we creating demand for?”

In the case of generating demand for healthy diets, a likely response is: “So a particular behavior can be practiced, in order to improve nutrition outcomes.” To determine which behavior your program should promote, consult nutrition experts and review your foundational project documents (e.g., award document, theory of change, results framework). Possible behaviors include—

- feed children age 6–23 months a variety of age-appropriate, safe, diverse, nutrient-rich foods
- purchase nutrient-rich food
- eat a variety of safe, diverse, nutrient-rich foods for meals and snacks daily.

These nutrition behaviors are important because they are well-known, evidence-based behaviors that can improve global nutrition outcomes if practiced widely. However, these behaviors are not specific enough to be promoted or adopted as written. They must be made specific to the local context or market environment. For example, in the behavior “feed children a variety of age-appropriate, safe, diverse, nutrient-rich foods,” it is not clear which foods are age-appropriate, safe, and nutrient-rich in a specific community. Without specific food groups, foods, or preparations stated in the behavior, the audience may have trouble determining exactly what should be done and when. Specificity also helps implementers tailor their efforts, accurately measure their progress, and adapt accordingly. With that in mind, ask yourself:

“How can we make the behavior more specific?”

Let’s assume that your program’s global nutrition behavior is to help families eat a variety of safe, diverse, nutrient-rich foods for meals and snacks daily. You will probably know which foods the program will focus on before it starts. Use that information to make the behavior more specific; for example, eat green leafy vegetables daily or eat animal source foods daily. Depending on your population and the diversity of available foods, “green leafy vegetables” or “animal source foods” may still be too broad. Families might have too many options.
If you are unsure whether the food group is too broad to promote to the community or whether certain foods in the group (e.g., beef, chicken, eggs, milk) are acceptable in the target population, consider adding Willingness to Try questions to your formative research plan. You need to gauge what your primary audience is willing to try in relation to the primary behavior. For example, would they try eggs (or other promoted food) if they were boiled? Would they try adding eggs to their breakfast porridge? You can find a description of Willingness to Try questions, the ways you can use this data, and sample questions (ready to adapt and add to your research instruments) in Annex 2 (Marketing Healthy Diets Persona Map Guide: Understanding Your Audience). Once you collect your formative research data, revisit the behavior to determine whether you need to revise it. Based on your findings, you may need to make the behavior more specific.

In addition to making the action more specific, we must also determine who performs it. In other words, who needs to eat green leafy vegetables or animal source foods? Be as specific as possible when identifying the audience. Using the previously narrowed behavior eat green leafy vegetables daily, let’s assume that the activity mandate suggests that caregivers should eat green leafy vegetables daily. The more specific behavior in this case would be caregivers eat green leafy vegetables daily. Although various supporting actors will contribute to this behavior and secondary behaviors (e.g., fathers purchase green leafy vegetables weekly), the main focus should be on the primary audience (caregivers) and the primary behavior (eat green leafy vegetables daily).

Another option for narrowing a behavior is to specify when or where it should occur. Figure 3 shows how to specify a behavior by including what, who, and when/where.

Once the desired behavior has been specified—meaning it includes a specific audience who should practice a specific behavior at a specific time or place—add it to the behavior list in the Persona Map. Marketing strategies are created to achieve a specific behavior by reaching the audience that should practice that behavior. Therefore, anyone
involved in the marketing campaign should clearly understand each behavior and its intended audience, as well as have the ability to reach the audience.

**Understand the Audience**

Now that you have defined and specified the desired behavior (*caregivers eat green leafy vegetables*), you need to ensure that you truly understand the target audience. A good starting point is to identify socio-demographic characteristics of your primary audience, such as education, religion, and wealth quintile. However, this information alone will not help you motivate or compel audiences to adopt a behavior. Socio-demographic information also does not tell you what might make it easier or more difficult for someone to practice the desired behavior. Consider the following questions:

- What does the primary audience (caregivers) do now instead of eating green leafy vegetables daily?
- What would compel them to change?
- What do they see as the risks and benefits of change?
- Do we need to further break down our primary audience into segments to better understand them (e.g., pregnant women as one target audience and non-pregnant women as another)?

**Figure 3. Narrowing a Behavior**

*BEHAVIOR*

There are many ways to define the term *behavior*. Simply put, it is a specific action performed by a specific actor or audience at a specific time or place.

**ACTION**

What is the action you want to change?

**AUDIENCE**

Who is the actor or audience?

**TIME AND PLACE**

When is the time and where is the place?

**Nutrition actions include—**

- Feed with age-appropriate frequency, amount, and consistency.
- Repeatedly purchase a nutrient-rich food.
- Eat a variety of safe, diverse, and nutrient-rich foods for meals/snacks daily.
- Retailers sell micronutrient-rich foods.

**Audiences include—**

- farmers
- retail market vendors
- family members
- community health workers
- food transporters/distributors
- policymakers
- religious leaders.

**Time/places include—**

- age
- before/during/after pregnancy
- before/during/after school
- during breakfast/dinner
- at home
- at the market/store
- at the community health center.
## PERSONA MAP

<table>
<thead>
<tr>
<th>OVERALL</th>
<th>BEHAVIOR</th>
<th>FACTORS</th>
<th>LIFE</th>
<th>INSIGHTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUDIENCE</td>
<td>WILLINGNESS TO TRY NEW BEHAVIOR</td>
<td>INTERNAL</td>
<td>DAILY ROUTINE AND TIME USE</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEHAVIOR</td>
<td></td>
<td></td>
<td>INFLUENCERS AND SOCIAL NETWORK INFORMATION CHANNELS</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>SOCIO-DEMOGRAPHIC INFORMATION</td>
<td>WILLINGNESS TO TRY NEW WAYS OF PRACTICING BEHAVIOR</td>
<td>SOCIAL</td>
<td>ASPIRATIONS</td>
<td></td>
</tr>
<tr>
<td>AGE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RELIGION</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EDUCATION</td>
<td></td>
<td></td>
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<tr>
<td>WEALTH</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USEFUL CONTEXTUAL INFORMATION</td>
<td></td>
<td>STRUCTURAL</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Audience Profile

## Primary Audience or Supporting Actor

<table>
<thead>
<tr>
<th>Characteristic</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tagline</td>
<td></td>
</tr>
<tr>
<td>Characteristic 1</td>
<td></td>
</tr>
<tr>
<td>Characteristic 2</td>
<td></td>
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<tr>
<td>Characteristic 3</td>
<td></td>
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<tr>
<td>Characteristic 4</td>
<td></td>
</tr>
<tr>
<td>Characteristic 5</td>
<td></td>
</tr>
</tbody>
</table>
As a team, ask yourselves:

“What behavior would the audience change, and what makes it difficult or easy for the audience to practice the specified behavior?”

Factors are the elements within or beyond someone’s immediate control that can affect their ability to perform a behavior. Factors can serve as motivators or barriers to behavior change. Effective marketing programs must build on known motivators and decrease or remove barriers.

The following factors can influence people’s ability to practice important nutrition behaviors:

- cost of food
- time needed to prepare food
- availability of food in a community
- taste of food
- ability to make decisions about food purchases
- norms about what community members are supposed to eat during various life stages
- religious or gender restrictions surrounding particular foods
- influencer opinions.
If your activity has already worked with caregivers in the geographic area where your activity is planning to carry out its marketing efforts, you may have an idea which factors might influence caregivers’ consumption of green leafy vegetables. You might also have secondary literature confirming the factors. In either case, plot the information into the Persona Map. If you do not have this information, use Annex 2 (Marketing Healthy Diets Persona Map Guide: Understanding Your Audience). This annex includes approaches and questions that you can adapt and include in your formative research to explore internal, social, and structural factors that influence adoption of the behavior you are promoting in the focus community.

As you learn about the factors that influence your desired behavior, you might notice that certain people (e.g., mothers, spouses, friends, religious leaders) influence the actor’s ability to practice the behavior. Ask yourself:

“Who needs to do what to support the primary actor’s effort to practice the behavior?”

An influencer or supporting actor inspires or guides others’ actions. Demand generation programs may design activities that target influencers/supporting actors because these people might be motivators or barriers to behavior change. An influencer can affect the primary actor’s likelihood to perform a behavior. Although the influencer may not be the primary actor for the specific nutrition behavior, they can adopt other behaviors to help the primary actor practice the promoted behavior.

An influencer’s actions might include—

- raising/growing (e.g., uncles and aunts grow green leafy vegetables for the caregiver’s consumption)
- preparing/preserving/storing (e.g., grandmothers prepare meals at lunchtime that include green leafy vegetables for caregiver’s consumption)
- earning/buying (e.g., fathers buy green leafy vegetables at the market weekly to ensure the availability of green leafy vegetables for caregiver consumption)
- resting/sharing (e.g., family members equally share household duties to allow caregivers time to rest and eat green leafy vegetables)
- eating/feeding (e.g., adolescents help feed the baby at lunchtime so caregivers have time to consume green leafy vegetables)
- selling/promoting in the market (e.g., vendors promote the sale of green leafy vegetables at the market to increase demand of green leafy vegetables among caregivers)

A supporting actor’s actions are also behaviors. Therefore, you need to know what motivates them to act, just as you explored with the primary actor. Complete a Persona Map to determine an Audience Profile for each supporting actor. The supporting actors will determine the sample (i.e., which respondents you will survey or interview) for your primary data collection (i.e., formative research).

Because you will have behaviors for both the primary audience and influencers, do not include too many behaviors in your marketing campaign. Consider how each influencer behavior links directly back to the primary audience’s priority behavior. This will help you prioritize behaviors. Focusing on fewer behaviors will maximize your resources, prevent you from overwhelming program participants, and increase the likelihood of sustained change (Packard 2018). Work with your nutrition/agriculture, SBC, and MEL representatives to prioritize your activity’s behaviors.

**Conduct Formative Research**

Throughout this section, you used past experiences and secondary data to populate Persona Maps and create Audience Profiles for primary audiences and influencers and their behaviors. For unknown information, you selected questions linked to the Persona Map’s areas of inquiry, which will be included in your formative research. **Prior to starting any marketing initiatives, you should conduct formative research and interpret the data the research yields.** Whether you are filling gaps in your understanding of the audience and behavior by reviewing secondary data or collecting primary data, ensure that your research team has diverse skill sets. You need team members representing areas such as
a behavior is to segment your audience. You may notice from your formative research that not everyone shares the same attitudes, interests, beliefs, values, and lifestyles. For example, formative research may reveal that pregnant caregivers and non-pregnant caregivers require different marketing approaches in your campaign. Behavioral segmentation can greatly influence your marketing campaign’s efficiency and impact (Krawiec et al. 2021).

**MONITORING, EVALUATION, AND LEARNING**

Measure primary and supporting actor behaviors in the monitoring and evaluation plan, along with critical factors that impact the adoption of those behaviors.

- **Sample Behavioral Outcome Indicators:**

  - Percentage of female participants of U.S. Government nutrition-sensitive agriculture activities consuming a diet of minimum diversity

- **Sample Factor Indicators:**

  - Percent of the audience who believe that the recommended practice/product will reduce their risk
  - Number of children under age x whose parents/caretakers received behavior change communication interventions that promote essential infant and young child feeding behaviors
  - Cost of nutrient adequacy as a percent of household food expenditure

The activity’s CLA plan should offer an opportunity to continue to learn about the audience and their behavior throughout the activity’s life cycle.

The *Measuring Social and Behavior Change in Nutrition Programs: A Guide for Evaluators* is a helpful tool to help you monitor and evaluate your social marketing efforts.
After reading the “Getting to Know Your Audience” section, you may realize that most barriers to adopting promoted behaviors are structural.

Structural factors often relate to supply challenges and can include—

- product and vendor proximity
- product availability
- product quality
- price
- funds available; control of income
- time or opportunity to go to the market (Melesse et al. 2019).

Without adequate supply, demand generation efforts are ineffectual. Addressing both supply and demand ensures that an activity’s efforts consider consumers’ needs more holistically and increases the likelihood that the promoted behavior will be adopted and sustained. The “marketing mix” framework—or 4Ps approach—helps define your marketing options in terms of product, place, price, and promotion so that your program’s offering meets a specific customer need or demand.

The ethical marketing mix comprises four elements: product responsibility, price transparency, place fairness, and honest promotion.

- **Product** is a specific, tangible item (e.g., live chicken, chicken parts, minced chicken).
- **Place** is where the product is available for the customer to access it.
• **Price** is what the consumer pays to have access to the product (which can sometimes be an aggregation of costs; e.g., the cost of transportation and childcare necessary to create the opportunity to obtain the product).

• **Promotion** is the means, tools, and channels used to communicate the product benefits. Figure 5 illustrates the marketing mix approach.

This guide focuses exclusively on promotion. If product, place, and price need to be addressed for your demand generation efforts to be successful, you can find additional guidance at the Global Health eLearning Center.

At a minimum, you should try to understand the following questions about product, price, and place:

**Product**

• What does the customer need or want from the product?
• What features does the product have to meet those needs?
• How and where will the primary audience use the product?
• What does the product look like (shape, size, color)?
• What is the product called?
• How is the product branded?
• How is the product different from competitors’ products?

**Price**

• Where do buyers look for the product?
• How can you access the correct distribution channels?
• Do you need to use a sales team?
• What do your competitors do?

**Place**

• What is the value of the product?
• Are there established price points for the product in your area?
• Is the customer price-sensitive?
• What discounts should be offered?
• How does your price compare to competitors?

These inquiries can be included in your formative research if you know you will be working with vendors or if these structural factors are prevalent in your population. You can also conduct a separate market or consumer assessment. Note that product, place, and price research and intervention will require expertise from other program colleagues or external consultants.
BRAND STRATEGY

This section of the guide will help you develop your brand vision and identity. Table 3 summarizes the related objectives, time involved, and necessary human resources, as well as the collateral output.

Define the Brand Vision and Develop the Brand Identity

Brands play an important role in the adoption of promoted behaviors (Evans et al. 2015). In this section, you will learn what a brand is, whether your SBC program needs a brand, how to create and manage a brand (with support from a creative agency), and how to build a sustainable brand.

What is a Brand?

A brand is a strategic asset with a reputation. This definition conveys some important concepts:

A strategic asset is something that has value. This value is derived from the awareness and associations (the meaning) that are created and built over time.

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4. Several parts of this section are adapted from Mann Global Health n.d.
## Table 3. Summary of Brand Strategy

<table>
<thead>
<tr>
<th>OBJECTIVES</th>
<th>OUTPUTS</th>
<th>TIME</th>
<th>HUMAN RESOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Define a brand vision.</td>
<td>Your “brand on paper”—a written description of your brand.</td>
<td>Allocate 3–6 months to—</td>
<td>• Creative agency: Assist in brand development and management.</td>
</tr>
<tr>
<td>• Develop a brand identity.</td>
<td></td>
<td>• Write and align key stakeholders to the brief.</td>
<td>• SBC experts: Apply behavioral theory and marketing techniques.</td>
</tr>
<tr>
<td>• Manage your brand.</td>
<td></td>
<td>• Identify, contract, and onboard a creative agency.</td>
<td>• M&amp;E experts: Develop indicators to track and measure brand awareness and success among primary audiences.</td>
</tr>
<tr>
<td>• Create sustainability.</td>
<td></td>
<td>• Develop and test brand ideas and material with the audience.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Revise the brand direction based on audience feedback.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Finalize the core elements of the brand.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Train the team.</td>
<td></td>
</tr>
</tbody>
</table>

Awareness and meaning are the keys to a brand’s reputation. Brands are often created to change a company’s image or to reinforce the quality of a product or service, but a brand must have meaning for the audience it serves.

As a strategic asset, a brand can take many forms. Figure 6 shows some examples. These examples are brands because they have awareness and meaning for the audience they serve.

A brand may take multiple forms at once. For example, Grow Together is a behavior change campaign that also markets a product: small fish powder.5

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5. See [https://nourishproject.exposure.co/innovation-ideas](https://nourishproject.exposure.co/innovation-ideas) for more details on the Grow Together campaign and innovations.
Brands matter in three ways:

1. getting the audience to notice the campaign (notice)
2. reminding the audience about the product, service, or behavior (remember)
3. inspiring behavior change (act).

To ensure that your brand is noticed, remembered, and acted upon, program managers must—

• Build and sustain memory structures by designing a brand identity through logos, taglines, colors, fonts, personality, characters, and so on that will get the audience’s attention.
• Develop marketing campaigns and programs that inspire the audience to want to be a part of what the brand is offering.

The next section offers specific guidelines to ensure that your brand is noticed, remembered, and acted upon.

**Building a Brand**

Think about building a brand in two steps:

1. **Understanding the brand and marketing landscape assessment**

What brands and messages target the primary audience you selected in the “Identifying the Audience” section? If you have multiple brands and messages, focus on those that most closely match your behavior change objective. This may include fast moving consumer goods, such as food and health products; health messages from government agencies and nongovernmental organizations; and products and services for children.
Using the **marketing quality standards** highlighted in the introduction, how effective are your brands and campaigns? How could they be improved? To better understand your brand and marketing landscape, refer to **Annex 5 (Brand and Marketing Landscape Assessment Questions)**.

2. **Creating the brand “on paper”**

   There are many frameworks and models that marketers find helpful for developing and managing brands. We suggest a pyramid model that includes the following four elements:

   - **Brand vision:** A brand needs a clear statement that explains its importance. For SBC initiatives, it may be helpful to think of this statement as the *vision* for the audience if the project achieves its objectives. The vision inspires the audience, employees, and stakeholders to be part of the project because they identify with and believe in its objectives.
   - **Functional and emotional advantages:** What functional and emotional benefits do you want the brand to represent in the minds and hearts of the audience? How does the brand meet the audience’s needs and wants? Limit your list to three or four advantages. As the brand gains awareness and recognition, you can add benefits; however, including too many benefits in the beginning will dilute your message and make your campaign seem inconsistent.
   - **Brand identity:** Brand identity refers to the campaign’s creative elements, such as logo, colors, fonts, graphical designs, photography style, etc. These elements increase brand recognition and help support the vision. (For example, if
your brand vision includes hope and optimism for the future, the color palette should not be black and gray.)

- **Brand personality**: Brand personality is closely related to identity but is important enough that you should treat it separately. If your brand were a person, who would it be? A nurturing mother? A superhero? This does not mean that the brand takes on the literal form of this personality (e.g., superhero as brand mascot). However, the brand personality suggests its tone of voice and the role the brand aspires to play in the audience’s life. Using a clear personality consistently helps make a brand distinctive, recognizable, resonant, and trustworthy. All those involved in promoting the brand (e.g., community health workers [CHWs], vendors, peer group leaders) should embody the brand personality.

You can use **Worksheet 2 (Building a Brand Pyramid)** as a guide to create your brand on paper by building your brand pyramid with these four elements.

**Managing your Brand**

As a strategic asset, a brand—just like inventory, personnel, finances, etc.—must be managed. This management involves the following responsibilities:

- ensuring that the brand is executed accurately and consistently across the entire campaign
- ensuring brand awareness and meaning among the target audience
- identifying opportunities to strengthen the brand.

Figure 7 illustrates these responsibilities.

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**Figure 7. Brand Management**

![Diagram of Brand Management](image-url)
Achieving Brand Sustainability

For your marketing campaign to be truly successful, you must manage your brands for the long term. Top brands stay relevant (and resonant) over time. You don’t need to build a new brand every time you have a slightly different project or campaign. Consider Truth (an anti-smoking campaign) and Trust (a condom brand). Both brands have existed for decades and have reinvented themselves as their primary audiences have aged. As their original brand propositions became irrelevant to a younger generation, they had to adjust to their new primary audience. Both brands did extensive consumer research and updated their brand strategies, including their brand visions and identities, to appeal to a new generation.

Achieving brand sustainability requires—

• **leadership engagement**: There should be a consensus among organizational leaders about the brand, which is vitally important to the program’s success.

• **resource investment**: To create a brand that resonates with the audience and is long-lasting, you must invest in outside resources. Hire experienced creative agency partners to help develop the brand. If your resources are limited, consider working with existing brands to adapt brand approaches from other markets or similar projects.

• **brand accountability**: Assign someone on the team to manage the brand and track the program outcomes.

Figure 8 shows the conditions for developing a successful campaign.

When possible, it is important to maintain existing brands. A lot of time and resources have been invested in their development and growth, and established brands have meaning for the target audience. Existing brands should be continually renewed and refreshed to maintain their resonance, rather than being replaced with new brands.

Figure 8. Conditions for Campaign Development Success

**CONDITIONS FOR BRAND DEVELOPMENT SUCCESS**

**Start with a solid concept (strategy)**: The concept is the starting point for the campaign (creativity). The concept must include a strong insight and benefit that is clear, believable, and resonates with the audience.

**Participatory, collaborative approach**: Bring together a diverse group of people with different skills sets and interest in this project (e.g., a nutritionist, a graphic designer, a community leader, representatives from the audience). Set an atmosphere that encourages risk-taking and creativity: all ideas are welcome and encouraged; this is an opportunity to think creatively and build upon each other’s ideas.

**Team empowerment and creative confidence**: It takes courage to come up with creative ideas. It’s much easier to communicate the concept word for word—but also less effective. The team working on campaign development needs support and empowerment to do the creative brainstorming and risk-taking involved in identifying and championing creative ideas.
CAMPAIGN DEVELOPMENT

This section of the guide uses what you learned about the audience, behavior, and other factors to help you develop a concept and transform that concept into a marketing campaign. A concept includes four components: two that are always required—the insight and the benefit statement; and two that may be required, depending on the situation—a RTB and a call to action (CTA). Figure 9 illustrates the steps to develop a concept into a campaign.

Table 4 outlines the related objectives, outputs, time involved, and human resources in developing a campaign.

Figure 9. Developing a Concept into a Marketing Campaign
Articulate an Insight

The Role of an Insight
A simple messaging approach states a benefit and assumes that knowing the benefit will be enough to change behavior. An example of a simple messaging approach is telling community members that eggs are good for them. This information alone will not change the audience’s behavior. Marketing campaigns that require the audience to change its perspective require audience insight. Programs tasked with marketing healthy diets are unlikely to benefit from a simple messaging approach and therefore need insights.6

Insights are revelations drawn from audience research that inspire the audience, the project team, and creative agency partners to think and feel

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Table 4. Summary of Developing a Campaign

<table>
<thead>
<tr>
<th>OBJECTIVES</th>
<th>OUTPUTS</th>
<th>TIME</th>
<th>HUMAN RESOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Understand insights and how to develop strong insights from your understanding of the audience.</td>
<td>• Insights</td>
<td>• Critical at the beginning of the project cycle, but should also be incorporated into ongoing CLA efforts.</td>
<td>• SBC experts: Apply behavioral theory and marketing techniques</td>
</tr>
<tr>
<td>• Draw concepts from insights and test those concepts.</td>
<td>• Benefit statement</td>
<td>• Allocate 6–9 months for initial population-based primary data collection.</td>
<td>• Creative agency: Transform raw data into something creative; to make the idea itself better, creating interesting and engaging content</td>
</tr>
<tr>
<td>• Understand the difference between a concept, creative idea, and tagline.</td>
<td>• Concept(s)</td>
<td>• Allocate 2–4 months for abbreviated key informant data collection or secondary data review.</td>
<td>• M&amp;E experts: Develop indicators to track the data the strategy yields, then incorporate measurement techniques</td>
</tr>
<tr>
<td>• Understand how to transform a concept into a tagline.</td>
<td>• Creative idea</td>
<td></td>
<td>• Nutrition and agriculture experts: Ensure that the behavioral design is technically sound and as evidence-driven as possible</td>
</tr>
<tr>
<td>• Evaluate creative ideas and taglines.</td>
<td></td>
<td></td>
<td>• Community members and stakeholders: Help co-create and advise insights, concepts, and taglines by pretesting and testing concepts to validate them</td>
</tr>
</tbody>
</table>

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6: This section is adapted from Mann Global Health n.d.
differently. Audience insights elicit responses such as, “Aha!” or “Hmmm, I hadn’t thought of it that way before.” Insights motivate the audience to change their behavior or approach a problem differently.

Consider the insights listed in table 5 and how each insight might inspire the audience to accept the promoted behavior. The example insights in table 5 are from a campaign that promotes the consumption of vitamin A-rich foods such as dark green leafy vegetables and iron-fortified bouillon cubes to address iron deficiency among adolescent girls.

**How to Know if You Need an Insight**

Insights can come from anywhere. For example, they can be based on a barrier (mothers lack the authority to implement changes in the household), an opportunity (community members feel optimism about the future), a fact (adolescent girls need 50 percent more iron versus when they were younger), or a comment or observation about the audience (fathers take pride in providing for their families). In each of these examples, the insights are rooted in something the audience cares about deeply and represent something the audience may not have known or had not previously thought about in the same way.

To develop strong insights, you could consult a creative agency at the beginning of your process. A creative agency can help you understand your formative research in order to craft strong insights. Figure 10 summarizes the conditions for successfully developing insights.

**Developing an insight** starts with deriving meaning from your primary research and organizing your findings into a Persona Map, which we covered in the “Getting to Know Your Audience” section of this guide. The final two steps are identifying themes and reworking insights.

1. Identify themes and ideas that might lead to a strong insight. Consider research findings that surprise you or that might make the audience think and feel differently.

2. Rewrite the insight until it meets the criteria for a strong insight (see the five criteria in the following section).

Repeat this process until you have two or three strong insights.

After you identify two or three strong insights, test them to ensure that they resonate with the audience and that they inspire the audience to think and feel differently. You will test your insights in the context of a concept test, which is described in table 10 in this guide.

**Table 5. Insights in Addressing Iron Deficiency Among Adolescent Girls**

<table>
<thead>
<tr>
<th>INSIGHT</th>
<th>HOW THIS INSIGHT MIGHT HELP TO ACHIEVE PROJECT OBJECTIVES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mothers want their teenage daughters to be happy and successful; they don’t realize that their daughters likely suffer from iron-deficiency anemia (50% of teenage girls are anemic), that anemia affects their daughters’ ability to concentrate and focus, and that their daughters need 50% more iron versus when they were younger (Lion et al. 2018).</td>
<td>Mothers become concerned about their daughters’ ability to focus and concentrate, which they now realize is directly linked to their happiness and success; they take steps to include more iron-rich foods in their daughters’ meals, including those promoted by the campaign (dark green leafy vegetables and bouillon cubes).</td>
</tr>
</tbody>
</table>
**Five Criteria of a Strong Insight**

Strong insights meet the following five criteria:

1. involve tension  
2. are true but not obvious  
3. strike an emotional response  
4. inspire the audience to think or feel differently  
5. are easy for the project team to remember and use.

These criteria are explained in table 6, using the example insight from table 5. Worksheet 3 (Insight Assessment) will help you determine the strength of your insights using these criteria. Table 6 is a completed version of worksheet 3 (Insight Assessment), showing how the example insight fulfills all five criteria.

**Implications for Measurement**

Your insight likely includes an assumption about an attitude or behavior shift that you are encouraging the audience to make. You should measure the degree to which the audience agrees with or accepts this attitude or behavior shift before, during, and after the campaign.

To monitor the intermediary outcomes (e.g., the campaign’s effect on shifting attitudes and behavior based on the insight), you must develop and incorporate measures into the activity’s MEL plan that monitor—

1. acceptance of concept elements  
   a. percent of audience that agrees with or believes the insight  
   b. percent of audience that agrees with or believes the benefit  
2. campaign reach, participation, and retention  
   a. percent of audience that recalls hearing or seeing a specific product, practice, or service

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**Figure 10. Conditions for Successful Insight Development**

**CONDITIONS FOR INSIGHT DEVELOPMENT SUCCESS**

**Robust foundational research:** Successful insight development depends on the quality of audience understanding and the team’s ability to get “below the surface.”

**Strong collaboration:** Insight development is best done as a collaborative process in which a small team (two to three people) immerses itself in the foundational research process, synthesizes the findings, and collaborates on crafting insights.

**Team experience and capability:** It may prove helpful to engage someone with experience in human-centered design and reaching consumers, such as creative agency strategists and planners.

**Team empowerment and creative confidence:** While it is much easier to communicate a straightforward message (e.g., eat animal sourced foods because protein is good for you), it is also less effective than a strong insight. The team needs support and empowerment to do detective-type work involved in insights.
Table 6. Criteria for a Strong Insight

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>DETAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does it have tension?</td>
<td>Yes. Mothers want their teenage daughters to be happy and successful, but it is likely that iron deficiency is hindering their success and happiness.</td>
</tr>
<tr>
<td>Is it true but not obvious?</td>
<td>Yes. The mothers may notice that their teenage daughters seem tired or unable to focus, but they likely haven’t connected this behavior to iron deficiency.</td>
</tr>
<tr>
<td>Does it strike an emotional response?</td>
<td>Yes. From a mother’s perspective, the idea that her daughter is likely to have iron deficiency—and that this affects her ability to concentrate and focus—is alarming.</td>
</tr>
<tr>
<td>Does it inspire the audience to think or feel differently?</td>
<td>Yes. This insight presents two new pieces of information that inspire the mother to think and feel differently: (1) Her own teenage daughter is likely to be iron deficient; and (2) her teenage daughter needs 50% more iron versus when she was younger.</td>
</tr>
<tr>
<td>Is it easy for the project team to remember and use?</td>
<td>It could be shorter. For example: 50% of adolescent girls suffer from iron deficiency; adolescent girls need 50% more iron versus when they were younger.</td>
</tr>
</tbody>
</table>

b. percent of audience participating in community-level campaign activities  
c. percent of audience that has seen or heard the campaign  
d. percent of audience that remembers the campaign.  

These measures should be reviewed and interpreted with the behavioral outcome indicators and factor indicators that were determined in the “Understand Your Audience” section of the guide.

Table 7 summarizes possible MEL questions from an insight.

**Communicate a Specific Benefit**

After you develop your insights, you need to create a benefit statement. A benefit statement represents the benefit to the audience—what is in it for them. The benefit must relate to the insight, and it must be articulated in a way that is important to the audience. A strong benefit statement meets the following criteria:

- **Clear**: Can your benefit statement be easily understood after reading or hearing it just once?
- **Specific**: Does your benefit statement include enough details?
- **Believable**: Will your primary audience trust and accept what your benefit statement communicates?
- **Resonant**: Do the specific details in your benefit statement genuinely matter to your primary audience?
Table 7. Insight and Possible MEL Questions

<table>
<thead>
<tr>
<th>INSIGHT</th>
<th>POSSIBLE MEL QUESTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mothers want their teenage daughters to be happy and successful; they don’t realize that their daughters likely suffer from iron-deficiency anemia (50% of teenage girls are anemic), that anemia affects their daughters’ ability to concentrate and focus, and that their daughters need 50% more iron versus when they were younger.</td>
<td>Percentage of mothers who agree—</td>
</tr>
<tr>
<td></td>
<td>• that their daughters may be at risk of iron deficiency</td>
</tr>
<tr>
<td></td>
<td>• that iron deficiency can affect one’s ability to</td>
</tr>
<tr>
<td></td>
<td>concentrate and focus</td>
</tr>
<tr>
<td></td>
<td>• that adolescent girls need 50% more iron versus</td>
</tr>
<tr>
<td></td>
<td>when they were younger.</td>
</tr>
</tbody>
</table>

How to Develop a Strong Benefit Statement

To improve your benefit statement, enroll the help of a diverse group of experts (e.g., a nutritionist, a chef, another caregiver). Brainstorm as many specific benefits as possible. Articulate each benefit statement in a way that is meaningful for the audience.

You should also solicit audience feedback in a concept test (see the “Test Your Concept” section below for details).

Consider a project that aims to motivate caregivers to feed eggs to their young children. The project team has determined through formative research that feeding eggs to young children is a feasible behavior and that an opportunity exists to engage fathers as the primary audience.

A potential benefit statement could be “Eggs are good for your child’s health.” However, this benefit statement is not specific enough to resonate with the primary audience. Because the father is the primary audience, you need to determine what benefits matter most from his point of view.

You can do this through a brainstorming exercise on the benefits of feeding eggs to children. You may find it helpful to identify themes (e.g., childhood growth, satiety), or you may prefer to jump right in and start listing as many potential benefits as you can. Table 8 lists some example results from this exercise.

After you brainstorm a list of potential specific benefit statements, use the following three techniques from Worksheet 4 (Strengthening Your Benefit Statement) to strengthen each statement.

Consider the evolution of this benefit statement: “Eggs are good for your child.”

1. Include WHY the benefit matters.

   “Eggs are good for your child.”

   “Eggs are good for your child because they will help your child feel full.”

You might find that adding “because they will help your child feel full” to the benefit statement allows caregivers to better understand that feeding their child an egg at an evening meal would help that child feel full enough to sleep through the night. Similarly, you could include “because they help your child’s brain develop,” depending on what resonates with your primary audience. (These are just examples; consult your nutritionist for actual nutritional benefits. Box 1 includes suggestions for making your benefit statement memorable.)
Table 8. Potential Benefits of Feeding Eggs to Young Children

<table>
<thead>
<tr>
<th>THEMES</th>
<th>POTENTIAL BENEFITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health and growth</td>
<td>Helps build strong muscles and bones</td>
</tr>
<tr>
<td></td>
<td>Helps children’s brains develop</td>
</tr>
<tr>
<td>Joy and happiness</td>
<td>Children love eating eggs</td>
</tr>
<tr>
<td></td>
<td>Eggs are delicious</td>
</tr>
<tr>
<td>Satiety</td>
<td>Helps children feel full</td>
</tr>
<tr>
<td>Practicality</td>
<td>Allows you to feed your child something different every day (e.g., hard boiled,</td>
</tr>
<tr>
<td></td>
<td>soft boiled, scrambled, omelet)</td>
</tr>
</tbody>
</table>

2. **Make the benefit a strong or superior statement.**

   “Eggs are good for your child because they will help your child feel full.”

   “Eggs are good for your child because they will help your child feel full and sleep through the night.”

As this benefit statement evolves, you will notice it becoming longer and more specific. This specificity allows the benefit to resonate better with the primary audience, addressing what truly matters to them.

3. **Make the benefit more salient or more noticeable.**

   “Eggs are good for your child because they will help your child feel full and sleep through the night.”

   “Eggs are good for your child because they will help your child feel full and sleep through the night tonight.”

Making the benefit more urgent or more emotional increases its appeal. Adding “tonight” to the example creates a tangible motivation for the primary audience to adopt the behavior because they understand that they could see the benefit immediately.

**CATCHY BENEFIT STATEMENTS**

- **Eggs**: No other food does so much for your child’s health.
- **Eggs**: One small food that does 10 big things for your child’s health.
- **Eggs**: The healthiest food that children love to eat.
Develop Your Concept

Table 9 summarizes each component of the example concept, including the two required components (insight and benefit statement) and the two additional components (reason to believe and call to action) that are required only if they are necessary to improve believability and clarity. An RTB explicitly communicates why the audience should trust and adopt the selected behavior. A CTA circles back to the selected behavior: now that the audience understands and believes the benefit statement, what specific action should they do? They should practice the behavior.

You can use Worksheet 5 (Building Your Concept) to practice writing out the components of your concept, once for your own understanding (internal) and then how you want to communicate them to your audience (external). Table 9 provides an example.

Test Your Concept

Once you have some strong insights and benefit statements (as well as an RTB and CTA, if necessary), you are ready to test concepts. The purpose of the concept test is to make sure you have an idea that touches the heart and opens the mind of your primary audience. In this section you will learn some best practices for conducting a concept test.

Design your concept testing to help understand—

- Is the Table 10 insight true? Does it make the audience think or feel differently?
- Is the insight meaningful? Does it represent an idea that is important to the audience? Why or why not?
- Is the benefit meaningful? Does it resonate? Why or why not?
- Is the benefit believable? If not, what might the audience need to know or understand to make the benefit believable?
• How can you strengthen the benefit statement even further? Revisit the three techniques described earlier to strengthen the benefit statement. Do this before each round of testing with your audience, and incorporate what you learn to continuously strengthen your benefit statement.

• Is it clear what you want the audience to do? Do you need a call to action?

Refer to Annex 4 (Concept Testing Best Practices) for detailed concept testing best practices.

**Move from Concept to Campaign**

Congratulations! You now have a concept that has the potential to touch the heart and open the mind! You are ready to transform your concept into a campaign.

<table>
<thead>
<tr>
<th>CONCEPT COMPONENTS (internal, for your own understanding)</th>
<th>CONCEPT (external, to solicit audience feedback)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Insight</strong></td>
<td>Fathers play an important role in their children’s lives because they can help mothers take care of big things and influence decisions, but they need to recognize that small things also have a big impact.</td>
</tr>
<tr>
<td></td>
<td>Fathers play an important role in their children’s lives because they can help mothers take care of big things and influence big decisions, but they also need to recognize that small things also have a big impact.</td>
</tr>
<tr>
<td><strong>Benefit statement</strong></td>
<td>Eggs give your child the nutrients they need to feel full, which will help them sleep through the night.</td>
</tr>
<tr>
<td></td>
<td>Eggs give your child the nutrients they need to feel full, which will help them sleep through the night.</td>
</tr>
<tr>
<td><strong>RTB</strong></td>
<td>Eggs are protein-packed, and protein keeps us full for longer.</td>
</tr>
<tr>
<td></td>
<td>Eggs are protein-packed, and protein keeps us full for longer.</td>
</tr>
<tr>
<td><strong>CTA</strong></td>
<td>Make sure your child eats an egg every day.</td>
</tr>
<tr>
<td></td>
<td>Make sure your child eats an egg every day—it’s a small thing that makes a big difference!</td>
</tr>
</tbody>
</table>

In this section you will learn—

1. the difference between a concept and a campaign
2. how to transform your concept into a creative idea and then a campaign.

**REMEMBER!**
The components of a concept:

• Insight
• Benefit statement
• Reason to believe
• Call to action
### Table 10. Knorr’s Follow in My Green Food Steps/Toss, Stir, Crumble Campaign

<table>
<thead>
<tr>
<th>CONCEPT</th>
<th>CREATIVE IDEA</th>
<th>CAMPAIGN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mothers want their teenage daughters to be happy and successful; they don’t realize that their daughters likely suffer from iron-deficiency anemia (50% of teenage girls are anemic), that anemia affects their daughters’ ability to concentrate and focus, and that their daughters need 50% more iron versus when they were younger.</td>
<td>Follow in My Green Food Steps (Toss, Stir, Crumble)</td>
<td>Vehicles, channels, and tactics:</td>
</tr>
<tr>
<td>Girls can get the iron they need with fortified Knorr bouillon cubes and leafy greens.</td>
<td></td>
<td>• Song and video</td>
</tr>
<tr>
<td>Add Knorr bouillon cubes and leafy greens to your stew for delicious, nutritious meals everyone will love.</td>
<td></td>
<td>• Radio program</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Interactive cooking demonstrations and tastings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• School program for mothers and daughters (starter kits, educational content, commitment cards, song and dance)</td>
</tr>
</tbody>
</table>

---

### The Difference between a Concept and a Campaign

A concept is part of your marketing strategy, but it is not your campaign. It can be tempting to use your concept as your campaign (i.e., use the concept almost word for word). However, you will increase the likelihood that your message is noticed, understood, and remembered if you transform your concept into a campaign that captures the audience’s attention, engages them to process the message, and creates a memory.

Consider the example in table 10 from the Knorr Follow in My Green Food Steps campaign. The final marketing vehicles, including a song and music video, are a much more distinctive, engaging, and memorable way to communicate the message to “add a bouillon cube and leafy greens to your stew so girls get the iron they need.”

### How to Transform Your Concept into a Creative Idea and Then a Campaign

The following 12 steps outline a process to transform your concept into a campaign. You can use...
these suggestions as a guide, or follow them step by step. Either way, you will likely need to adapt the steps. You might find that you need more or fewer rounds of prototype testing or more or fewer rounds of brainstorming. You may also choose to hire a creative agency to help with this process.

1. **Identify the most interesting or most important part of the concept.**

**FOR EXAMPLE**

- Fathers play an important role in their children’s lives because they can help mothers take care of big things and influence big decisions, but they also need to recognize that small things also have a big impact.
A GUIDE TO SOCIAL MARKETING IN NUTRITION

Eggs give your child the nutrients they need when their brain is growing and developing the most.
That’s because eggs contain over 20 nutrients that support growth and development.
Make sure your child eats an egg every day—it’s a small thing that makes a big difference!

2. **Write a “how might we” question based on what you identified as the most important or most interesting thing in Step 1.**

**FOR EXAMPLE**
- How might we inspire fathers to engage in the “small things that have big impacts”?

3. **Brainstorm potential ways to answer the “how might we” question.** In this session, the team will brainstorm ways to convey the idea of “small things that make a big difference” in a manner that might inspire fathers.

**FOR EXAMPLE**
- Reframe the idea of “men’s work” by discussing how men’s work involves paying attention to small things that have a big impact (e.g., planting seeds, hammering nails, mending a fishing net).
- Interview respected men in the community about their own fathers. Record the interviews and create video or radio content in which the men talk about the little things their own fathers did that had a big impact on them. Make this content the cornerstone of a campaign around lasting impact—and how it’s the little things that have a lasting impact.
- Engage performing artists who are also fathers to create content (e.g., comedy videos, songs, social media content) about small things that yield big results.
- Create a campaign around how most “big impact” results come from small things.

4. **Assess your ideas from Step 3 above and determine next steps.** Identify the creative idea behind each output from the brainstorming session. The example in Step 3 includes three creative ideas (men’s work, lasting impact, and big results). The third brainstorming idea (engaging performing artists) is a tactic that could work with any of the three creative ideas. Which idea will perform best based on the 10 marketing quality ingredients?

**FOR EXAMPLE**
- Explore lasting impact. (Interview a few respected leaders and see if you get the kind of content you are looking for.) This direction is distinctive and emotionally resonant. It has the potential to delight and engage, as well as to open the hearts and minds of fathers.
- If your lasting impact interviews do not yield great content, you can explore “men’s work” instead. It is quite possible that you can inspire men to think about their children’s nutrition by asking them to think about their own lives.

5. **Hold a prototyping session to bring your ideas to life.** You might bring your ideas to life through a drawing, an image found online, or a made-up story that could become a video or radio program.

**FOR EXAMPLE**
- Create scripts for potential stories men might tell about the small things their fathers did that had a lasting impact.

6. **Gather audience feedback on your ideas.** This step is similar to concept testing. The goal is to assess your creative prototype for overall audience understanding and resonance.

7. **Select a creative direction.** You can use Worksheet 6 (Selecting a Creative Direction) to analyze your audience feedback in light of the 10 marketing quality standards. Was your hypothesis correct (e.g., that the idea would be resonant, touch the heart, and open the mind)? Will the idea work? If so, how can you strengthen it? If not, go back and consider the other ideas you developed in Steps 3 and 4.
8. **Revisit your concept.** What other messages are important to communicate? How and where will you communicate those messages?

**FOR EXAMPLE**
- Eggs give your child the nutrients they need when their brain is growing and developing the most.
- Eggs contain protein to keep your child full and happy.
- Eggs contain over 20 nutrients that support growth and development.

9. **Brainstorm optimal placement.** Once you have the necessary information about your audience and have developed a concept, you can select your vehicles, channels, and tactics. Revisit what you know about the audience to identify vehicles, channels, and tactics where the audience is most likely to be receptive to the message. Consider what is unique about the creative idea: What vehicles, channels, and tactics make the most sense for the idea?

**FOR EXAMPLE**
- Radio program featuring stories from community leaders talking about the small things their fathers did that had a lasting impact on them, including content about ways fathers can have a lasting impact (such as making sure their children eat an egg every day, because eggs contain over 20 nutrients that support growth and development)
- Education programs for community leaders, clergy, and educators on how fathers can have a lasting impact on their children (including feeding eggs and other targeted behaviors)
- Partnership with battery manufacturer (“Will your impact outlast this battery?”)
- Partnership with pop singer or actor who is also a father, singing about or discussing the ways a father can ensure he has a lasting impact (message to include feeding your child an egg every day, along with other targeted behaviors)

10. **Assess your vehicles, channels, and tactics.** Do they all make sense for the audience and the idea? Can your budget support all of them? Which ones should you prioritize?

11. **Plan your content by vehicle/channel/tactic.** Review everything you have learned so far and determine the content you need to create for each vehicle/channel/tactic.

**FOR EXAMPLE**
- “Lasting impact” posters featuring well-known, respected community leaders
- Talking points on ways to have a lasting impact (for community leaders, clergy, and educators)
- Packaging design for batteries
- Poster or key visual comparing an egg to a battery (“Which will last longer?”), with key message that eggs give your child the nutrients they need when their brain is growing and developing the most

12. **Create and pretest your final materials.** Pretest to make sure final materials convey the intended message, are easy to understand, and are culturally relevant.

**REMEMBER!**
All claims within your concept need to be true and based on legitimate research. It is important to avoid overstating the potential benefits or impacts of adopting the behavior. Lying or deception is not the way to go about promoting healthy diets or generating demand for healthy food.
CONDITIONS FOR CAMPAIGN DEVELOPMENT SUCCESS

**Leadership engagement:** There should be a consensus among organizational leaders about the brand, as it is of utmost importance to the success of the program.

**Resource investment:** Marketing healthy diets requires investment to create something that resonates with the audience and is long-lasting. Invest in experienced creative agency partners to help develop the brand. If resources are limited, consider “borrowing” brand approaches from other markets or similar projects.

**Brand accountability:** Make someone on the team accountable for managing the brand as well as the programmatic outcomes.

**Everyone represents the brand:** From the audience’s perspective, everyone who represents the campaign is part of the brand, so consider ways to enroll and engage community outreach workers, vendors, etc., as representatives of the brand.
CONCLUSION

This guide has laid out clear steps that program planners and implementers can take to increase consumer demand for safe and nutritious foods. These steps involve identifying the behaviors you want to change and then gaining a better understanding of the audience and how they make decisions. You have learned how to search for and strengthen insights, as well as how to consider the “marketing mix” of product, place, price, and promotion as you develop your interventions. You should also understand how to consider whether or not developing a brand will help your project reach its goals.

You know to consider throughout your work the ethical marketing principles of fairness, honesty, and responsibility. Finally, you are now equipped to measure the outcomes of your work and adapt your marketing strategies as you go!

Using the best practices and creative techniques discussed in this guide can help all of us design and implement programs that do a better job of creating demand for safe and nutritious foods. Rather than relying solely on nutritional education and health messaging to promote products, we can market them to align with the perceptions, values, and emotions of customers—this is a much more effective way to build consumer demand and help nutrition programs achieve their goals.

Finally, publish or disseminate your results so that others can learn from your experience marketing healthy diets!
# Worksheet 1—Persona Map and Audience Profile

Return to the main body text.

**Instruction**: Use this worksheet to fill out the Persona Map and Audience Profile to help structure the formative research for your program.

## Persona Map

<table>
<thead>
<tr>
<th>Overall</th>
<th>Behavior</th>
<th>Factors</th>
<th>Life</th>
<th>Insights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience</td>
<td>Willingness to try new behavior</td>
<td>Internal</td>
<td>Daily routine and time use</td>
<td></td>
</tr>
<tr>
<td>Behavior</td>
<td></td>
<td></td>
<td>Influencers and social network information channels</td>
<td></td>
</tr>
<tr>
<td>Socio-Demographic Information</td>
<td>Willingness to try new ways of practicing behavior</td>
<td>Social</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td>Aspirations</td>
<td></td>
</tr>
<tr>
<td>Religion</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wealth</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Useful Contextual Information</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Structural</th>
<th></th>
</tr>
</thead>
</table>
# Audience Profile

## Primary Audience or Supporting Actor

<table>
<thead>
<tr>
<th>Tagline</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Characteristic 1</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Characteristic 2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Characteristic 3</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Characteristic 4</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Characteristic 5</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
WORKSHEET 2—BUILDING A BRAND PYRAMID

Return to the main body text.

Instructions: Use this worksheet to build your “brand on paper.” The brand pyramid below shows all the components that make up a brand. Fill in each ladder of the pyramid using what corresponds to each component in your context. Then, develop your campaign’s brand identity with a creative team—including logo, color palette, personality/tone of voice, graphical elements, etc. See example on next page.
Brand vision or essence

Brand persona or core values

Emotional benefits

Functional benefits

Features and attributes
EXAMPLE

Brand Pyramid for Lulun Project

Community Empowerment

- Iuluma (Aya Huma) Andean leader, Counselor, protector

Security, Belonging, Pride

Healthy Growth and Development

Spiral design, Chakana cross Poncho

Features and attributes

Functional benefits

Emotional benefits

Brand persona or core values

Brand vision or essence

Brand Identity for Lulun Project
**WORKSHEET 3—INSIGHT ASSESSMENT**

*Return to the main body text.*

**Instructions:** Use this worksheet to help you determine the strength of your insights according to the five criteria.

<table>
<thead>
<tr>
<th>DRAFT # WRITE YOUR INSIGHT HERE</th>
<th>ASSESSMENT USE THE CRITERIA TO ASSESS YOUR INSIGHT</th>
<th>SUMMARIZE YOUR LEARNING AND NEXT STEPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>Yes (y)/ No (n)</td>
<td></td>
</tr>
<tr>
<td>Does it have tension?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is it true but not obvious?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does it strike an emotional response?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does it inspire the audience to think or feel differently?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is it easy for the project team to remember and use?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Climate change is becoming increasingly urgent! The most important thing an individual can do to make a difference is to adopt a meat- and dairy-free diet.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>y/n</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does it have tension?</td>
<td>y</td>
</tr>
<tr>
<td>Is it true but not obvious?</td>
<td>n</td>
</tr>
<tr>
<td>Does it strike an emotional response?</td>
<td>n</td>
</tr>
<tr>
<td>Does it inspire the audience to think or feel differently?</td>
<td>y</td>
</tr>
<tr>
<td>Is it easy for the project team to remember and use?</td>
<td>y</td>
</tr>
</tbody>
</table>

While we cannot know for sure if this insight will inspire the audience to think or feel differently without doing further research, we do know that the audience already wants to eat less meat. It is unlikely that more information about why they should eat less meat will help them. We need an insight that better addresses the barrier.
<table>
<thead>
<tr>
<th>DRAFT 2—EXAMPLE</th>
<th>ASSESSMENT</th>
<th>USE THE CRITERIA TO ASSESS YOUR INSIGHT</th>
<th>SUMMARIZE YOUR LEARNING AND NEXT STEPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'd like to reduce the amount of meat in my diet, but vegetables don't taste as good.</td>
<td>Criteria</td>
<td>y/n</td>
<td>This insight is about the barrier, and it's true. However, it's too obvious. Is there something deeper that can be revealed?</td>
</tr>
<tr>
<td>Does it have tension?</td>
<td>y</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is it true but not obvious?</td>
<td>n</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does it strike an emotional response?</td>
<td>n</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does it inspire the audience to think or feel differently?</td>
<td>y</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is it easy for the project team to remember and use?</td>
<td>y</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
People know that vegetables are good for them, but they don’t think vegetarian meals are relevant to them. “Only vegans and vegetarians would want to eat vegetable-based meals.”

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Y/N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does it have tension?</td>
<td>y</td>
</tr>
<tr>
<td>Is it true but not obvious?</td>
<td>y</td>
</tr>
<tr>
<td>Does it strike an emotional response?</td>
<td></td>
</tr>
<tr>
<td>Does it inspire the audience to think or feel differently?</td>
<td>y</td>
</tr>
<tr>
<td>Is it easy for the project team to remember and use?</td>
<td></td>
</tr>
</tbody>
</table>

This insight is about the barrier, it’s true, and it goes a little deeper than the previous version. It reveals the underlying belief that people think vegetarian options “aren’t for them” and suggests that they might be inspired to think about vegetable-based meals differently if the campaign spoke to them and not to “vegans and vegetarians.”
**WORKSHEET 4—STRENGTHENING YOUR BENEFIT STATEMENT**

**Return to the main body text.**

**Instructions:** Use this worksheet to strengthen your benefit statement(s) to ensure they resonate with the primary audience. See example on next page.

<table>
<thead>
<tr>
<th>WRITE YOUR BENEFIT STATEMENT HERE</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>WRITE 1–3 WAYS TO IMPROVE THE BENEFIT STATEMENT FOR EACH OF THE PROMPTS BELOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include WHY the benefit matters</td>
</tr>
<tr>
<td>Make the benefit a strong or superior statement</td>
</tr>
<tr>
<td>Make the benefit more salient or more noticeable (more urgent, emotional, or concrete)</td>
</tr>
</tbody>
</table>
**EXAMPLE**

<table>
<thead>
<tr>
<th>WRITE YOUR BENEFIT STATEMENT HERE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eggs are good for your child's health</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WRITE 1–3 WAYS TO IMPROVE THE BENEFIT STATEMENT FOR EACH OF THE PROMPTS BELOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include WHY the benefit matters</td>
</tr>
<tr>
<td>Eggs help your child’s brain develop so they can do well in school.</td>
</tr>
<tr>
<td>Make the benefit a strong or superior statement</td>
</tr>
<tr>
<td>Eggs: One small food that does 10 big things for your child's health.</td>
</tr>
<tr>
<td>Make the benefit more salient or more noticeable (more urgent, emotional, or concrete)</td>
</tr>
<tr>
<td>Eggs give your child the nutrients they need when their brain is growing and developing the most.</td>
</tr>
</tbody>
</table>
### WRITE YOUR BENEFIT STATEMENT HERE


### WRITE 1–3 WAYS TO IMPROVE THE BENEFIT STATEMENT FOR EACH OF THE PROMPTS BELOW

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include WHY the benefit matters</td>
<td></td>
</tr>
<tr>
<td>Make the benefit a strong or superior statement</td>
<td></td>
</tr>
<tr>
<td>Make the benefit more salient or more noticeable (more urgent, emotional, or concrete)</td>
<td></td>
</tr>
</tbody>
</table>
**WORKSHEET 5—BUILDING YOUR CONCEPT**

Return to the main body text.

**Instructions:** Use this worksheet to write out the components of your concept, once for your own understanding (internal) and another for communicating them to your audience (external).

<table>
<thead>
<tr>
<th>CONCEPT COMPONENTS (internal, for your own understanding)</th>
<th>CONCEPT (external, to solicit audience feedback)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fill in the sections below with the insight and benefit statement you developed in the previous sections. If your benefit statement needs more explanation to make it believable, include an RTB. If your audience needs to understand a specific action, include a CTA.</td>
<td>Include all the components of your concept in the section below, rewriting them slightly so they flow and make sense from the audience's point of view.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Insight</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit statement</td>
<td></td>
</tr>
<tr>
<td>RTB</td>
<td></td>
</tr>
<tr>
<td>CTA</td>
<td></td>
</tr>
</tbody>
</table>
### Example

<table>
<thead>
<tr>
<th>Concept Components</th>
<th>Concept</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Insight</strong></td>
<td>Fathers play an important role in their children’s lives because they help take care of the big things, but sometimes small things have the biggest impact.</td>
</tr>
<tr>
<td><strong>Benefit statement</strong></td>
<td>Eggs give your child the nutrients they need when their brain is growing and developing the most.</td>
</tr>
<tr>
<td><strong>RTB</strong></td>
<td>Eggs contain over 20 nutrients that support growth and development.</td>
</tr>
<tr>
<td><strong>CTA</strong></td>
<td>Make sure your child eats an egg every day.</td>
</tr>
</tbody>
</table>
### WORKSHEET 6—SELECTING A CREATIVE DIRECTION

Return to the main body text.

**Instructions:** Use this worksheet to analyze your audience feedback in light of the 10 marketing quality standards. This will help you assess the accuracy of your hypothesis and probability of the creative idea.

<table>
<thead>
<tr>
<th>MARKETING QUALITY STANDARDS</th>
<th>ASSESSMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Distinctiveness</td>
<td></td>
</tr>
<tr>
<td>2. Consistency</td>
<td></td>
</tr>
<tr>
<td>3. Resonance</td>
<td></td>
</tr>
<tr>
<td>4. Presence of a clear and specific benefit</td>
<td></td>
</tr>
<tr>
<td>5. Contextual relevance</td>
<td></td>
</tr>
<tr>
<td>6. Believability</td>
<td></td>
</tr>
<tr>
<td>7. Touches the heart/opens the mind</td>
<td></td>
</tr>
<tr>
<td>8. Delight</td>
<td></td>
</tr>
<tr>
<td>9. Engagement</td>
<td></td>
</tr>
<tr>
<td>10. Placement when and where it matters*</td>
<td></td>
</tr>
</tbody>
</table>

* The best programs reach the audience while also placing the message at critical “moments of truth.”
<table>
<thead>
<tr>
<th>ASSESSMENT</th>
<th>NEXT STEPS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>
### Example

<table>
<thead>
<tr>
<th><strong>MARKETING QUALITY STANDARDS</strong></th>
<th><strong>ASSESSMENT</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Distinctiveness</td>
<td>Both directions seem distinctive; cut vegetables feels like it could be stronger.</td>
</tr>
<tr>
<td>2. Consistency</td>
<td>We'll use consistent branding so the audience knows this is from Pret A Manger.</td>
</tr>
<tr>
<td>3. Resonance</td>
<td>People had more emotional reactions to the cut vegetable lion; they were more excited about it.</td>
</tr>
<tr>
<td>4. Presence of a clear and specific benefit</td>
<td>We need to refine this further to make the benefit clearer; a tagline would help explain the idea. We need to make sure people understand that we are not selling veggie platters (potential issue with the cut vegetables being shaped like a lion face).</td>
</tr>
<tr>
<td>5. Contextual relevance</td>
<td>There was nothing suggesting that it wasn’t relevant for either direction. How could we make it more relevant?</td>
</tr>
<tr>
<td>6. Believability</td>
<td>There might be some issues with believability (a lion would never eat a salad); it’s important to communicate this in a light-hearted way.</td>
</tr>
<tr>
<td>7. Touches the heart/opens the mind</td>
<td>The people who understood the idea thought it was interesting, and it made them want to try vegetarian meals.</td>
</tr>
<tr>
<td>8. Delight</td>
<td>There were a lot of “cute” comments about the cut vegetable design. We can also delight with the in-store experience, meal sampling, and maybe some free products at launch.</td>
</tr>
<tr>
<td>9. Engagement</td>
<td>How can we use social media and sampling events to drive word of mouth?</td>
</tr>
<tr>
<td>10. Placement when and where it matters*</td>
<td>Will explore in a separate exercise</td>
</tr>
</tbody>
</table>

*The best programs reach the audience while also placing the message at critical “moments of truth.”
<table>
<thead>
<tr>
<th>ASSESSMENT</th>
<th>NEXT STEPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>More people understood the salad bowl lion face, but there was more positive sentiment about the cut vegetable lion face. How could we improve the cut vegetables? The salad bowl lion also has the potential to better communicate how delicious our dishes look. If we pursue the other direction, how can we also show deliciousness?</td>
<td>Prioritize the cut vegetable lion. It’s more distinctive and delightful. Make sure the main idea—our vegetarian dishes are for carnivores, too—comes across. Consider a tagline and use a greater variety of vegetables that are also in our dishes. What other animals, in addition to the lion, could we use? Make some creatives assets from food photography to communicate the deliciousness of our vegetarian meals.</td>
</tr>
</tbody>
</table>
GLOSSARY

A

B

barriers: n. Factors within or beyond an individual’s immediate sphere of control or influence that hinder their ability to perform behaviors effectively.

behavior: n. A specific action performed by a specific actor/audience at a specific time or place.

brand: n. A strategic asset with a reputation that helps create awareness, remind consumers about products and services, and provide a sense of meaning, identity, and belonging.

campaign: n. An organized course of action to achieve a goal.

concept: n. Used to develop a marketing campaign. It includes four components: two that are always required—the insight and the benefit statement; and two that may be required, depending on the situation—a reason to believe and a call to action.

demand generation/creation: n. Data-driven marketing strategy focused on driving awareness of and interest in safe, nutritious diets or nutrient-rich foods, with the ultimate goal of supporting improved nutrition outcomes. It uses research to bring the consumer perspective to the forefront and uses the consumer’s point of view to define the need and consequently the marketing and media mix that can be used to respond to it.

D

formative research: n. Formative research can be used to understand the seven lines of inquiry that every SBC nutrition program needs to know about their audience(s).

G

global nutrition behavior: n. Well-known, evidence-based behaviors that, if practiced widely, can improve nutrition outcomes globally.

H

healthy diets: n. Diets that are of adequate quantity and quality to achieve optimal growth and development of all individuals and support functioning and physical, mental, and social well-being at all life stages and physiological needs. Healthy diets are safe, diverse, balanced, and based on nutritious foods. They help protect against malnutrition in all its forms, including undernutrition, micronutrient deficiencies, and overweight and obesity, and lower the risk of diet-related non-communicable diseases. The exact makeup of healthy diets varies depending on an individual’s characteristics (e.g., age, gender, lifestyle, and degree of physical activity); geographical, demographic, and cultural patterns and contexts; food preferences; availability of foods from local, regional, and international sources; and dietary customs (USAID 2022, 86).

I

influencer/supporting audience: n. A person who inspires or guides the action of others. The influencer drives the primary audiences’s likelihood to perform behaviors effectively.

insight: n. A simple messaging approach states a benefit and assumes that this knowledge will be enough to change behavior.

J

K

L
motivators: n. Factors within or beyond an individual’s immediate sphere of control or influence that incentivize them to perform certain behaviors.

primary audience: n. The desired audience to practice the nutrition behavior that was specified.

social marketing: n. Social marketing was created to apply commercial marketing approaches to promote products, services, or behaviors to improve health. Social marketing uses research to bring the consumer perspective to the forefront and uses the client’s (consumer’s) point of view to define a social problem and consequently the marketing and media mix that can be used to respond to it. Social marketing also recognizes that communication (i.e., promotion) is only one element of the marketing mix and that products, behaviors, placement, and pricing could be equally important to achieving the objective.

strategic asset: n. Something that has value. This value is derived from the awareness and associations (the meaning) that are created and built over time.

supporting audience/influencer: n. A person who inspires or guides the action of others. The influencer drives the primary audiences’s likelihood to perform behaviors effectively.
REFERENCES


## ANNEX 1—18 BRAND AND MARKETING BEST PRACTICES SUMMARY

### AUDIENCE FOCUS

1. Identify the Audience and Behavior Change Objective
   - **Audience**: specific and actionable
   - **Behavior Change Objective**: clear

2. Understand the Audience
   - Psychographics, not just demographics
   - Unspoken as well as spoken; notice things about the audience that they themselves aren’t aware of

3. Articulate an Insight
   - Has tension
   - Is true but not obvious
   - Is emotional
   - Inspires audience to think or feel differently

### BRAND STRATEGY

4. Define the Brand Vision
   - Clear
   - Resonates with the audience

5. Develop the Brand Identity
   - Reflects brand vision
   - Distinctive
   - Has a personality
   - Executed consistently

### CAMPAIGN STRATEGY

6. Communicate a Benefit
   - Clear
   - Believable
   - Resonates with the audience

7. Touch the Heart, Open the Mind
   - The audience thinks or feels differently

8. Select Marketing Vehicles and Ensure Message Continuity
   - Right for the audience
   - Right for the message
   - Message is consistent and continuous

9. Delight the Audience
   - Initiative is delightful

10. Inspire Audience Engagement
    - The audience proactively engages with the brand

---

1 Mann Global Health. n.d.
## MEASUREMENT

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Message was tested prior to launch and proven to be clear, believable, and to resonate with the audience</td>
<td>• Data indicate brand and marketing campaign caused intended results</td>
<td>• Brand measures (beyond awareness/exposure) are tracked and consistent with expected result</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>14. Evaluate Marketing Vehicle Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Robust analysis indicates which vehicles are most effective</td>
</tr>
</tbody>
</table>

## GOVERNANCE

<table>
<thead>
<tr>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>• Donors, stakeholders, and influencers are aligned and organized to support brand and marketing strategy</td>
<td>• Process and decision-making support brand and marketing best practices</td>
<td>• Implementers and decision makers have skills and experience to support brand and marketing best practices</td>
</tr>
<tr>
<td>• Employees are passionate about the brand vision</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>18. Rewards and Incentives</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Rewards and incentives are linked to project outcomes and aligned across stakeholders</td>
</tr>
</tbody>
</table>
The first step in understanding your audience is to fill out the Persona Map based on information you already know. This guide will help you answer any remaining questions about the audience by brainstorming techniques to use when conducting your formative research. Each area of inquiry on the Persona Map is also included in this guide, with overarching research questions for each area. You will also find examples of techniques to use during your formative research to answer these overarching questions.

Note that this is only a guide; all questions should be adapted to your specific context and audience. Techniques and areas of inquiry can be mixed and matched. For example, to conduct research on internal factors, you could use the Vignette or Social Norms Exploration Tool (SNET) techniques; you are not bound to using the Problem Tree and Five Whys techniques. This is not an exhaustive document; you are encouraged to adapt the techniques and examples.

Since this work aims to gain a deeper understanding of audience members, it is especially important to—

• Use trusted methods.
• Undertake ethical considerations.
• Be responsible in how you use the data.

Once you complete the Persona Map, you can then create an Audience Profile for each audience. The Audience Profile is a concise snapshot of each audience segment based on what you have learned.

<table>
<thead>
<tr>
<th>AREAS OF INQUIRY</th>
<th>PAGE</th>
<th>RECOMMENDED TECHNIQUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Willingness to try</td>
<td>1</td>
<td>• Trial of Improved Practices (TIPS)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Willingness to Try Questions</td>
</tr>
<tr>
<td>Internal factors</td>
<td>2–3</td>
<td>• Problem Tree</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Five Whys</td>
</tr>
<tr>
<td>Social factors</td>
<td>4</td>
<td>• Vignettes</td>
</tr>
<tr>
<td>Structural factors</td>
<td>5</td>
<td>• Journey Maps</td>
</tr>
<tr>
<td>Daily routine/time use</td>
<td>6</td>
<td>• Bean Plotting</td>
</tr>
<tr>
<td>Influencers and social networks</td>
<td>7</td>
<td>• Social Norms Exploration Tool</td>
</tr>
<tr>
<td>Information channels</td>
<td>8</td>
<td>• Group Interview</td>
</tr>
<tr>
<td>Aspirations</td>
<td>9</td>
<td>• Card Sort</td>
</tr>
<tr>
<td>Persona Map</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Audience Profile</td>
<td>11</td>
<td></td>
</tr>
</tbody>
</table>
## WILLINGNESS TO TRY (THE “WHAT”)  
Overarching research question: What context-appropriate behaviors are people able and willing to try?

### TIPS
- **TECHNIQUE**
- **INSTRUCTIONS**
  TIPS is an anthropologically/ethnographically based technique that coaches people through a new behavior to see what may be feasible and why. TIPS should be used when your primary research focus is understanding communities' willingness to try new behaviors and ways of adopting the behaviors. Programs include the classic TIPS techniques and an accelerated TIPS approach.

### Questions/examples
- Refer to this link (will be published soon)

### Willingness To Try Questions
- **TECHNIQUE**
- **INSTRUCTIONS**
  You can adapt these questions and include them in your existing survey to determine your respondents' willingness to try a new behavior or ways of adopting a new behavior.

### Questions/example
1. In the past year, have you tried a new food? Why did you decide to try it? Why are you using the food now?
2. Ask specifically about particular foods. “I am going to suggest some ideas that might be new for you or your family; please offer your initial opinion. For each suggestion, say why you might try the food or try to eat it more often. Include any constraints you see to trying it. Let’s start:
   - Would you drink goat milk twice a day?
   - Would you try traditional sour milk with porridge?
   - Would you be willing to add dried small fish powder to your food?”
3. Would you need to speak to anyone else to make the decision to try one of these foods?
INTERNAL FACTORS (THE “WHY”)

**Research question:** What internal facilitators and barriers exist in x audience member’s life that help or hinder their ability to adopt x behavior?

<table>
<thead>
<tr>
<th>TECHNIQUE</th>
<th>INSTRUCTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Problem Tree</strong></td>
<td>This technique compares problems to trees. The problem is the trunk of the tree, the causes of the problem are the roots, and the effects of the problem are the leaves and branches (<strong>URBACT</strong> n.d.). Begin by drawing a tree. Have the respondent write a problem they are facing within the trunk of the tree. Ask them to list some effects of that problem on them, their family, their life, etc. Write the effects on the branches and leaves. Then have them think about what could be causing the problem. Write the causes on the tree roots. Using this visual technique helps respondents think about cause and effect in a more concrete and universal way.</td>
</tr>
</tbody>
</table>

**Questions/examples**

**Researcher:** “Please draw a large tree on the paper, with a few big roots, a thick trunk, and many branches and leaves.

Now, I am going to write something in the trunk (researcher can write if the respondent cannot or would not like to), like ‘not buying animal source foods at the market.’ Can you explain the reasons why you might not buy animal source foods at the market? Now, can you explain the effects that not buying animal source foods might have on you and your family?”
My children do not plot as well at growth monitoring and promotion sessions.

My children complain of hunger.

My husband complains that meals are not delicious.

My family eats only ugali some nights.

Not buying nyama choma at the market recently.

It is very expensive.

It is often not found at the market close to me.

I think we all get the nutrients we need from ugali.

I think that too much meat is bad for children.
<table>
<thead>
<tr>
<th>TECHNIQUE</th>
<th>INSTRUCTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Five Whys</strong></td>
<td>This technique moves past a person’s surface-level motivations and beliefs to reach the core of why they engage in a particular behavior or why they think a certain way. Begin by asking a relatively broad question related to your topic of inquiry. For example: “Why weren’t you able to buy x healthy food last week?” Ask “Why?” to each response, to encourage the respondent to think about the chain of connections. It may take a few “whys” to get an in-depth answer.</td>
</tr>
</tbody>
</table>

**Questions/example**

**Researcher**: “I am going to ask you a question, and then I am going to push you to answer the question ‘why’ several times. This will help us better understand the real reason behind the problem.”

1. **Researcher**: “Why haven’t you been buying green leafy vegetables at the market recently?”
   **Respondent**: “I don’t like the taste.”

2. **Researcher**: “Why?”
   **Respondent**: “They are not delicious enough to spend so much money on.”

3. **Researcher**: “Why?”
   **Respondent**: “My husband prefers us to buy more delicious food with our money, and I want to make him happy.”

4. **Researcher**: “Why?”
   **Respondent**: “Because when there is harmony in the house, it is better for everyone.”

5. **Researcher**: “Why?”
   **Respondent**: “Because when everyone is at peace in the home, everyone sleeps better, especially the children and baby.”
### SOCIAL FACTORS (THE "WHY")

**Research question**: What social facilitators and barriers exist in x audience member’s life that help or hinder their ability to adopt x behavior?

<table>
<thead>
<tr>
<th>TECHNIQUE</th>
<th>INSTRUCTIONS</th>
</tr>
</thead>
</table>
| **Vignettes** | Vignettes are short, realistic stories about social topics in the specific community that allow the respondent to give their thoughts and opinions about a situation as a third party, rather than answering questions directly about themselves or their own life.  
1. Begin by telling the respondent the story, using fictional yet culturally appropriate characters. The story should relate to the information regarding social factors that impact the respondent’s ability to adopt the promoted behavior.  
2. Once you finish telling the story, ask the respondent a series of questions, such as, “Is this true?” “What would you do?” “Have you heard of this?” “What do people normally do in these situations?” |

| Questions/examples | |
|---------------------||
| **Researcher**: “Last week, Aminifu was cooking for her children. Because she had not been able to go to the market for a few days, all she was able to prepare was ugali [a Kenyan cornmeal staple]. Her children said it was delicious, but not long after lunchtime, the children were complaining of hunger again. What would you do in this situation?” |
| **Respondent**: “I would try to incorporate some nutrient-rich foods in the meal, like sukuma wiki [Kenyan green leafy vegetable dish], that would help keep the children satisfied longer and not get hungry as quickly. But I understand why Aminifu is unable to reach the market, as it is the same here. Sometimes people I know in the village have no one to watch their children, and it is a long walk to the nearest market—too long of a walk for her to make with many children. I bet Aminifu’s husband works all day, so maybe she could go to the market to buy some kale and tomatoes for the dish if she had someone to help watch her children.” |
**STRUCTURAL FACTORS (THE “WHY”)**

**Research question:** What facilitators and structural barriers exist in x audience member’s life that help or hinder their ability to adopt x behavior?

<table>
<thead>
<tr>
<th>TECHNIQUE</th>
<th>INSTRUCTIONS</th>
</tr>
</thead>
</table>
| **Journey Maps** | A Journey Map allows the researcher to understand the respondent’s life more holistically, which in turn allows the researcher to better understand the structural factors that help or hinder behavior adoption.  
1. Talk through and record all the steps of a particular “journey” of interest, such as getting to the market.  
2. Probe the respondent to include very minor details about their journey, from the moment they decide to go to the moment they get home.  
3. Organize the steps into a map or timeline. |

**Questions/examples**

**Researcher:** “Think about a trip to the market. Explain to me everything that happens, from the moment you make the decision to go to the moment you return home.”

![Journey Map Diagram](image-url)
**STRUCTURAL FACTORS (THE “WHY”)**

**Research question:** When and where can we reach x audience members with x message for it to be most effective?

<table>
<thead>
<tr>
<th>TECHNIQUE</th>
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</thead>
<tbody>
<tr>
<td><strong>Bean Plotting</strong></td>
<td>This activity helps the researcher better understand how the participant spends their day, but it requires some prior knowledge of the broad activities the respondent may participate in daily (for the cards).</td>
</tr>
</tbody>
</table>

1. Provide the participant with several cards with images of daily activities: sleeping, meal time, working, shopping for food, cooking, bathing, looking after children, etc., and 24 beans. Explain that each bean represents one hour in the day.

2. Ask them to divide their beans among the activities. If they spend seven hours a night sleeping, the sleeping image card would have seven beans allocated to it.

This is a good chance to learn what activities the respondent participates in that are not provided on the cards. This activity will spark conversation, as well as give the researcher a better idea of where messages and marketing of healthy diets would be most effective.

**Questions/examples**

**Researcher:** “We will look at a few cards to get a better understanding of how you spend your days. Let’s first identify what activity is on each card so we agree what it is.”

1. “Which cards show things you do EVERY DAY?”

2. “How would you allocate your 24 beans (each bean representing one hour of the day)? For example, please place two beans on cooking if you spend two hours each day cooking. Please place eight beans on sleeping if you spend eight hours each day sleeping. This does not have to be perfect, as we know that not every day is exactly the same. We are interested in a general idea of how you spend your life, day-to-day.”

**IMAGES FOR DRAFT PLACEMENT ONLY**

- SLEEPING
- COOKING
- EATING
- FEEDING
- SOCIALIZING
- WORKING
# Influencers and Social Networks (The “How”)

**Research question:** Which members of the respondent’s social network have the greatest influence on their life and decision-making?

<table>
<thead>
<tr>
<th>Technique</th>
<th>Instructions</th>
</tr>
</thead>
</table>
| SNET      | **Access the English tool**  
**Accéder à la version française**  
This technique should be used when influencers and social networks are the main area of inquiry for the project, as they require detailed and planned one-on-one interviews. To learn which people in the respondent’s life have the most influence, provide guidance and support, and share information, conduct speed interviews of about 5–10 minutes with four or five very specific questions. All interviews should be private, one-on-one, and conducted with an interview guide and a quick way to record the participants’ responses.  
Source: [USAID 2020](#) |

**Questions/examples**

Refer to [this link](#).
INFORMATION CHANNELS (THE “HOW”)

Research question: How do respondents receive their information regarding healthy diets?

<table>
<thead>
<tr>
<th>TECHNIQUE</th>
<th>INSTRUCTIONS</th>
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</thead>
</table>
| **Group Interview** | This technique allows the researcher to understand multiple respondents’ information channels at once and gives respondents an opportunity to bounce off of each other.  
Gather on neutral ground with a group of audience members from the same segment (e.g., all caregivers) and ask them questions. Express that you want to hear from everyone. You can ask the questions to the whole group, or ask one member to answer first. Encourage respondents to respond and share based on what their peers say. |

Questions/examples

**Researcher:** “I am going to ask you all some questions. I want to hear everyone’s point of view, and I would like us to have a discussion about the topic, so please do not hesitate to add your thoughts and experiences, even if they are different from others.”

1. “Who offers you advice about food? Or where do you get that advice?”
   - **Respondent 1:** “Local CHWs told me what I should eat after having my baby.”
   - **Respondent 2:** “Same! And my good friend Bishara.”
   - **Respondent 3:** “I also get a lot of advice about food and what to eat from my mothers group [peer groups].”
   - **Respondent 1:** “True … I also see info and advice about this on social media, but I trust it less.”

2. “Who tells you what to buy at the market?”
   - **Respondent 2:** “Local CHWs at the health clinic have told me to eat more green leafy vegetables.”
   - **Respondent 1:** “Yes, and my husband will either buy the food at the market himself or tell me what he wants me to buy.”
   - **Respondent 3:** “My husband does that too. But I also hear about recipes on the radio and television, and so I know what to buy to make those recipes from the radio show.”
   - **Respondent 1:** “I really trust the local CHWs, but my husband has the final say in what we buy.”
   - **Respondent 3:** “Same.”

3. “Who do you trust when it comes to staying safe with food?”
   - **Respondent 3:** “My mother-in-law taught me how to wash my vegetables.”
   - **Respondent 2:** “My mother did the same thing! I have also seen posters in the health center about safely handling meat products so no one gets sick.”
   - **Respondent 1:** “I have seen that poster! And the vendor at the market told me how to stay safe when I bought chicken last week.”
   - **Respondent 2:** “Was it the vendor at the end of the street on Sunday? I talk to him too; he has great advice.”
### ASPIRATIONS (THE “WHY”)

**Research question:** What are your personal/work related/etc. hopes for this next season (depending on how your respondent is likely to delineate time)?

<table>
<thead>
<tr>
<th>TECHNIQUE</th>
<th>INSTRUCTIONS</th>
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</table>
| **Card Sort** | 1. Present the respondent with a stack of cards that demonstrate different possible long- and short-term aspirations that are easily understood (on a scale of importance to them, masculine to feminine, expensive to cheap, delicious to not delicious, etc.). Aspirations should be relevant and tailored to the respondent. For example, a mother who works in the field might have cards that include an image of a bountiful harvest, a healthy and smiling baby, a happy couple holding hands, etc.  
2. You can then take one of two routes: ranking or grouping. For ranking: Ask the respondent to rank the cards in a specific order (of importance to them, on a scale of masculine to feminine, expensive to cheap, delicious to not delicious). This will give you a better idea of the respondent’s priorities and aspirations. For grouping: Ask the respondent to categorize the cards based on the groups they see represented in the cards.  
Source: DesignKit, n.d. |

**Questions/examples**

**Researcher:** “For each picture of a food that I hold up, let’s first identify it so we agree what it is. Then, I would like you to decide on (or agree if there is more than one respondent) where the card fits along the line that shows women at one end and men at the other. If you think the food is most associated with women, put it on or near the woman. If it is more associated with men, put it on or close to the man. If the food is associated with both women and men, place it in the middle. I will ask you why you made your decision, but don’t think too long about it. There is no right or wrong answer. I want your first impressions.”
# Persona Map (With Instructions)

## Overall

<table>
<thead>
<tr>
<th>Audience</th>
<th>Behavior</th>
<th>Factors</th>
<th>Life</th>
<th>Insights</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Willingness to Try New Behavior</strong>&lt;br&gt;Asks the audience what behaviors are feasible and why&lt;br&gt;<strong>Example techniques:</strong> Trials of Improved Practices and Sour Milk Questions</td>
<td><strong>Internal</strong>&lt;br&gt;Provides information about knowledge gaps, attitudes and beliefs, self-efficacy, knowledge, and skills&lt;br&gt;<strong>Example techniques:</strong> Problem tree and 5 whys</td>
<td><strong>Daily Routine and Time Use</strong>&lt;br&gt;Provides a glimpse into the way audience spends the day&lt;br&gt;<strong>Example technique:</strong> Bean plotting.</td>
<td>What is a surprise? What have you learned about this audience as a whole: what themes have emerged from your discussions?</td>
<td></td>
</tr>
</tbody>
</table>

## Behavior

| Socio-Demographic Information | Willingness to Try New Ways of Practicing Behavior<br>Allows the programmer to make the behavior specific to the audience; not generic<br>**Example techniques:** Trials of Improved Practices and Sour Milk Questions | **Social**<br>Provides information about family and community support, gender roles, decision making, and norms.<br>**Example technique:** Vignettes | **Influencers and Social Network**<br>Shows who the audience trusts and may be influenced by.<br>**Example technique:** Social Norms Exploration Tool |

<table>
<thead>
<tr>
<th>Age</th>
<th>Religion</th>
<th>Education</th>
<th>Wealth</th>
</tr>
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</table>

## Useful Contextual Information

| **Structural**<br>Provides information on accessibility (cost, availability, time), food provider experience, market experience, etc.<br>**Example technique:** Journey Maps | **Information Channels**<br>Shares how the audience receives information.<br>**Example technique:** Group interview |

| Aspirations<br>Explains what matters most to the audience or motivates them.<br>**Example technique:** Card Sort |

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## AUDIENCE PROFILE

<table>
<thead>
<tr>
<th>PRIMARY AUDIENCE OR SUPPORTING ACTOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tagline</td>
</tr>
<tr>
<td>Characteristic 1</td>
</tr>
<tr>
<td>Characteristic 2</td>
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<td>Characteristic 3</td>
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<tr>
<td>Characteristic 4</td>
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<tr>
<td>Characteristic 5</td>
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</tbody>
</table>
ANNEX 3—DOES MY PROGRAM NEED A BRAND? DECISION TREE

Does My Program Need a Brand? Decision Tree

**Program Goal**

- Increasing accessibility → No
- Creating regulations → No
- Establishing nudges → No
- Creating a campaign → Yes!
- Promotion a product → Yes!

**Your SBC program**
## ANNEX 4—CONCEPT TESTING BEST PRACTICES

1. **Consider cultural context and norms when designing the testing methodology.** Focus groups and individual interviews are both appropriate methodologies to solicit audience feedback on concepts. However, depending on the cultural context, individual interviews may be preferable because focus group participants can sometimes be biased by dominant group members.

2. **Use images cautiously.** At this stage, use pictures only if they are necessary to communicate the concept (e.g., to show an image of a specific food with which the audience is not familiar). Otherwise, images can distract from the overall idea you want to assess. When working with audiences who are not literate, the researcher should read the concept and ask for the research participants’ reactions.

3. **Make sure research participants feel comfortable providing negative or critical feedback.** If you must ask a simple yes or no question, make sure “no” is an acceptable choice. For example, you could ask, “Consider this statement: Eggs contain over 20 nutrients that support growth and development. Do you believe that? Yes or no?”

4. **Listen with your eyes.** Watch participants’ body language and facial expressions during the interview. Many respondents provide the answers they think researchers want to hear. They may try to explain why something is meaningful to them, when in fact it might not be very meaningful. Such a response might sound like, “Yes, this is important to me because, as a mother, I want my child to be healthy.” Compare that response with, “Well, now I’m worried because it never occurred to me that my daughter might not be getting enough iron! This is really important—no wonder she’s tired all the time!” Watch and listen for what makes their face light up or makes their voice louder or a bit higher.

5. **Apply an iterative approach.** Once you understand the strengths and weaknesses of a particular concept, spend some time improving the concept before the next round of consumer research (e.g., conduct research on a Monday, rewrite concepts on Tuesday, conduct research with revised concepts on Wednesday).
### Brand and Marketing Landscape Assessment Questions

<table>
<thead>
<tr>
<th>Question</th>
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<tbody>
<tr>
<td>What food or nutrition-related brands and messages are geared toward your audience?</td>
</tr>
<tr>
<td>How effective are they?</td>
</tr>
<tr>
<td>How could they be improved?</td>
</tr>
<tr>
<td>What can we hypothesize about the primary audience based on the marketing messages we see?</td>
</tr>
<tr>
<td>What, if any, are the implications for the campaign you wish to create?</td>
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</tbody>
</table>