Appendix 2.1: **Campaign Planning Worksheet**

*This has been adapted, with permission, from the U.S. Centers for Disease Control and Prevention's **Designing and Implementing an Effective Tobacco Counter-Marketing Campaign**, which is available at http://www.cdc.gov/tobacco/media_communications/countermarketing/campaign/00_pdf/ Tobacco_CM_Manual.pdf.*

This worksheet should be used as a guide. Do not worry about filling in each item in this exact order. You will revise and improve on each step as your tobacco control marketing campaign progresses.

Think through each step and make sure that every activity moves you closer to your campaign goal. Before you complete this worksheet, you may find it helpful to review *Chapter 2: Strategic Planning* and other relevant information in the tool kit. The Campaign Planning Worksheet Guidelines on the following pages provide a quick reference to use in completing the worksheet.

Tobacco Control Goal:

Problem Statement and Background:

Target Audience(s):

Campaign Objective(s):

Strategy Statement:

Activities and Channels:

Opportunities for Collaboration:

Evaluation Plan:

Tasks and Timeline:

Budget and Resources:

Campaign Planning Worksheet Guidelines

Tobacco Control Goal

- Base your goal on research, the plans for your country's or region's overall tobacco control program, or both.

- Complete a separate Campaign Planning Worksheet for each goal because you need a separate plan for each goal you are addressing. Make sure overlapping areas are consistent and complementary.

Problem Statement and Background

- Describe the problem you are addressing. Specify the group(s) affected, how it is affected, and the severity of the problem. Give supporting epidemiologic data from current research and scientific literature.

- Identify who might be able to positively influence this situation or the affected group(s).

- Explain why your organization is addressing the problem.

- Assess and list your organization's strengths, weaknesses, opportunities and threats (SWOTs) related to the topic; its assets and resources; links to or influence with the target audience(s); current activities; and gaps and barriers to achieving the needed change.

- Review relevant theories and models applicable to campaigns.

Target Audience(s)

- Define the group(s) you want to reach, the desired results, and how you will measure those results.

- Select target audience(s). Decide which audience segments represent the highest priority for reaching your goal (e.g., those affected disproportionately by tobacco-related health problem(s), those who can be most easily reached and influenced, and groups large enough to justify intervention).

- Describe each target audience. Detail any knowledge you have about how each group is affected, as well as gaps in knowledge to be addressed through market research or other research. Include demographics, cultural and lifestyle characteristics, media preferences and habits, and other traits that will help you reach each group, as well as related feelings, attitudes, knowledge and behaviors.

- Determine which secondary audience(s) can influence the behavior of your primary audience(s).

Campaign Objective(s)

- Set objectives that reflect the desired results of campaign efforts within the given timeframe and resources, and within the context of a comprehensive tobacco control program.

- Write objectives that are specific, measurable, achievable, relevant and time-bound (SMART).

Strategy Statement

- Developing a strategy is usually an ongoing process; as you learn more about one element, other elements may need to be adjusted.

- Write a strategy statement for each target audience that includes:

    - Description of the target audience

    - Description of the action you want the audience to take as a result of exposure to your campaign, as specified in the objectives

    - Potential obstacles to taking the action

    - Description of audience's perceived benefits of taking the action

    - List of potential channels and activities that will reach audience members

    - Description of image, tone, look and feel of messages and materials most likely to reach the target audience

Activities and Channels

- Assess the current media environment related to your goal and decide which campaign approach(es) to use, such as advertising, public relations, media advocacy and community-based marketing.

- Determine for each target audience which approaches (or combination of approaches) best address the problem and your campaign objectives.

- Consider the *best* way to reach each target audience. Select channels and activities that fit your target audience, budget, time constraints and resources. Consider the positives and negatives of each type of channel.

Opportunities for Collaboration

- Determine whether you want to recruit partners for collaboration, and, if so, how many.

- Identify organizations that have similar goals and are willing to work with you.

- Be strategic in selecting organizations as partners. Consider which community-based organizations and businesses may help you achieve your goal by providing:

    - Access to a target audience

    - Enhanced credibility for your message or campaign, if the target audience considers the organization to be a trusted source

    - Additional resources, either financial or in-kind

    - Added expertise

    - Co-sponsorship of events

- Consider the requirements for collaboration with each partner, including time for additional approvals, minor or major changes in the campaign to match each partner's needs and priorities, etc.

Evaluation Plan

- Develop plans for formative research and evaluation, process evaluation and outcome evaluation.

- Base the design of your evaluation plan on the objectives of the campaign.

- Determine the most important questions for the evaluation, the information you will need now and in the future, how you will gather the information, and how you will analyze it.

- Identify evaluation experts, either internal or external to your organization, who will work with you throughout the design and implementation of your campaign to develop plans for the various types of evaluation.

- Perform *formative research* (research on the target audience before you develop the campaign) to help you gain valuable insights that will guide the development of your message and materials, as well as the channels of delivery.

- Conduct *formative evaluation* (research conducted during the development of your campaign to pretest and pilot test your interventions and messages) to determine (1) whether the materials you are developing effectively communicate what you intended, and (2) how the target audience will be influenced by your materials.

- Perform *process evaluation* to determine whether your campaign was implemented as planned and answer questions such as:

  - Did partners contribute as expected? Why or why not?

  - Did you schedule enough time for campaign development and implementation?

  - Was your issue covered by the news media your target audience sees or reads? Was your issue covered by the media in the way you had hoped?

  - Have you become a source for journalists covering this issue?

- Conduct *outcome evaluation* to help you answer the following important questions:

  - Did your campaign achieve the outcomes you expected?

  - Did you build awareness of the ads you ran? Of the other campaign elements?

  - Did the audience recall the campaign's main messages?

  - Did the audience increase its knowledge as desired or intended?

  - Did the audience change beliefs, attitudes and behaviors as desired?

  - What did the target audience think of your campaign? Did members become involved in the program?

  - Did a policy (e.g., smoke-free public places ordinance or tax increase) change as desired?

Tasks and Timeline

- List all activities that need to occur before, during and after implementation of your campaign.

- Identify major milestones, such as launch and start dates for specific activities.

Budget and Resources

- List all anticipated expenses, including staff time and other resources.

- Include all budget and resources available (staff, in-kind, internal, and external).

- Assess the financial and human resources available to help you anticipate funding needs, thoroughly plan your campaign to fit your budget, and make optimal use of all available resources.

Appendix 2.2: Sources of Information on Demographics and Tobacco Control and Use

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Here are some examples of resources you can use to develop demographic profiles of target audiences regarding tobacco use.

Government reports on tobacco use, including state, provincial, regional and national surveys

- Canada
  Canadian Tobacco Use Monitoring Survey
  http://www.hc-sc.gc.ca/hl-vs/tobac-tabac/research-recherche/stat/ctums-esutc/index_e.html

- Europe
  World Health Organization Regional Office for Europe, Tobacco Control database http://data.euro.who.int/tobacco/

- United Kingdom
  Department of Health, Publications and Statistics, Smoking, drinking and drug use
  http://www.dh.gov.uk/PublicationsAndStatistics/Statistics/StatisticalWorkAreas/StatisticalPublicHealth/ StatisticalPublicHealthArticle/fs/en?CONTENT_ID=4032542&chk=GhPZ%2By

- United States
  Centers for Disease Control and Prevention, Smoking & Tobacco Use, Data and Statistics
  http://www.cdc.gov/tobacco/data_statistics/index.htm

  U.S. Department of Health and Human Services, Office of Applied Studies, National Survey on Drug Use & Health
  http://www.drugabusestatistics.samhsa.gov/nsduh.htm

Non-governmental organizations' research on tobacco use, chronic disease prevention or addictions

American Cancer Society's *The Tobacco Atlas*
http://www.cancer.org/docroot/AA/content/AA_2_5_9x_Tobacco_Atlas.asp

Disease Control Priorities Project, Tobacco Addiction
http://www.dcp2.org/pubs/DCP/46

International Network of Women Against Tobacco
http://www.inwat.org/countryprofiles.htm

World Health Organization Tobacco Free Initiative, Surveillance and Monitoring
http://www.who.int/tobacco/surveillance/en/

Health organizations' research on tobacco control and tobacco issues

Action on Smoking and Health
http://www.no-smoking.org/

Globalink
http://globalink.org/

HealthBridge, formerly PATH Canada
http://www.healthbridge.ca/index_e.cfm

Institute for Global Tobacco Control at Johns Hopkins
http://www.jhsph.edu/global_tobacco/

International Union Against Cancer
http://www.uicc.org/

Physicians for a Smoke-free Canada
http://www.smoke-free.ca/

World Health Organization Tobacco Free Initiative
http://www.who.int/tobacco/en/

Journal articles and scientific reports

BioMed Central
http://www.biomedcentral.com/

Highwire Press, Stanford University
http://highwire.stanford.edu/

International Development Research Centre, Canada
http://www.idrc.ca/en/ev-1-201-1-DO_TOPIC.html

National Cancer Institute, U.S. National Institutes of Health
http://www.cancer.gov/

Society for Research on Nicotine and Tobacco Research Resources
http://www.srnt.org/resources/res_res.html

Tobacco Control Online
http://tc.bmj.com/misc/powerpoint.dtl

News about tobacco topics

Tobacco News and Information
http://www.tobacco.org/resources/general/tobsites.html#aastatistics

Appendix 2.3: Health Canada's "Bob and Martin" Smoking Cessation Campaign Overview

Social Marketing Objectives

Primary Objectives

1. Increase the number of ex-smokers age 40-54
2. Increase the number of smokers age 40-54 actively considering quitting who attempt to quit at least once
3. Increase the number of smokers accessing:

   - Health Canada's Web-based cessation resources

   - 1 800 O-Canada to obtain copies of Health Canada's print resources

   - Provincial Smokers' Helplines

   - Health Canada's Web site

Secondary Objectives

1. Increase the number of physicians, public health nurses, dentists and pharmacists that provide cessation assistance to their patients
2. Improve the mindset of 40- to 54-year-olds regarding their ability to quit
3. Increase awareness of the health benefits of quitting smoking
4. Promote healthy smoke-free lifestyles

Target Audience(s)

Primary Audience

Adult smokers ages 40-54, urban and rural across Canada, slightly skewed toward those of lower socio-economic status

Secondary Audiences

1. Mainstream recent quitters ages 40-54 who want to remain smoke-free, slightly skewed toward those of low socio-economic status
2. First Nations and Inuit, off reserve (ages 40-54)
3. Adult smokers ages 35-39, reached through the campaign targeted to smokers ages 40-54
4. Health professionals, pharmacists/pharmacies, stakeholders, provinces and territories
5. Media

Key Messages

1. The health benefits of quitting smoking and how it can contribute to the quality of life of the ex-smoker, loved ones, family and friends. Quitting smoking is the best thing to do for one's health.

2. It is possible to quit with a plan (promotion of cessation resources)—it may take more than one attempt, but it is possible. Emphasis will be on the smoker's ability to quit and the fact the smoker is not alone in facing this addiction; more people are quitting every day.

3. Help to quit smoking is available, and getting help often makes quitting easier and increases the chance the quitting attempt will be successful.

Tactics

1. Series of eight television ads and an Internet micro-site in which the characters "Bob" and "Martin" engage smokers with experiences they can relate to and encourage them to take action toward cessation. Each ad ends with a clear "call to action" to call a toll-free number or visit a Web site to access cessation resources provided by Health Canada's Tobacco Control Program, including referral to provincial quitlines. The micro-site directs visitors to Health Canada's online cessation tools.

2. Other campaign vehicles:

   • TV network partnerships

   • Billboards

   • Dailies

   • Readers' Digest collaboration and print ad that included mailing to physicians—Google keyword buys

   • Localized print advertising and regionalized TV advertising to promote specific quitlines

Strategic Alliances

In January 2005, Health Canada and a national retail pharmacy teamed up to help smokers quit by promoting National Non-Smoking Week (Jan 16-22). Initiative included a display of Health Canada how-to-quit pamphlets and posters. Smokers interested in quitting were directed to a pharmacist to receive advice on how to quit. In-store promotion included using the Bob and Martin characters to drive smokers to the pharmacist for consultation where the "On the Road to Quitting" booklet was provided. A pamphlet was developed and displayed on counters for customers to take away without discussion. Previous research had indicated that pharmacists are a trusted source of information on quitting.

In January 2006, Health Canada expanded its ability to help smokers quit by developing an initiative with the Canadian Pharmacist Association and eight national retail pharmacies. Smokers interested in quitting were directed to a pharmacist to receive advice on how to quit.

Timing

January 2003–March 31, 2005

Contact

For more information on this campaign, please e-mail info@hc-sc.gc.ca.