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Consumer Psychology and Marketing Overview: An Influence Operations Perspective

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Abstract

The purpose of this literature review was to acquire additional knowledge that would complement the previous work completed by HumanSystems Incorporated, Guelph, Ontario - in particular literature reviews on Influence Operations (CR-2007-146), Consumer Psychology (CR 2008-218) and an Annex to CF PSYOPS Materials, Information Management, Guidelines and Recommendations (CR 2008-215). Defence Research and Development Canada - Toronto has been conducting a larger research project whereby the goal is to contribute to the Canadian Forces' (CF) ability to plan, implement and evaluate influence campaigns for future expeditionary operations. Success in the business world, as measured by profitability and longevity, is a result of its ability to quickly adapt to changing demands from consumers and evolving tactics by competitors. Therefore, the business world is a potentially valuable and underutilized context in which to study tactics for marketing, advertising, public relations, media, and exploitation of consumer psychology, all or some of which could potentially be applied to current CF influence operations. This paper presents an exploration of how some of these business tools and philosophies could be applied to military influence operations (e.g., PSYOPs) to help give the CF an edge in today's asymmetric campaigns. Future research considerations and directions, in light of the lessons learned from the marketing world, are also discussed.

Résumé

Le présent examen de la littérature vise à obtenir plus de connaissances, lesquelles complèteraient les travaux précédemment exécutés par HumanSystems Incorporé, à Guelph, en Ontario – en particulier les examens de la littérature sur les opérations d’influence (CR-2007-146), la psychologie du consommateur (CR 2008-218) et une annexe au matériel, à la gestion de l’information, aux directives et aux recommandations des OPS PSY des FC (CR 2008-215). Recherche et développement pour la défense Canada — Toronto dirige un projet de recherche de plus grande envergure qui vise à contribuer à la capacité des Forces canadiennes (FC) à planifier, à mettre en œuvre et à évaluer les campagnes d’influence en prévision des futures opérations expéditionnaires. Le taux de réussite dans le milieu des affaires, évalué selon la rentabilité et la longévité, découle de la capacité à s’adapter rapidement aux demandes changeantes des consommateurs et à l’évolution de la tactique des concurrents. Par conséquent, le milieu des affaires constitue un contexte sous-utilisé qui pourrait s’avérer utile pour l’étude des stratégies de marketing, de publicité, de relations publiques, des médias et de l’exploitation de la psychologie du consommateur, dont certains ou la totalité pourraient être applicables aux opérations d’influence actuelles des FC. Cet article se veut une exploration de la façon dont certains de ces outils et certaines de ces philosophies pourraient servir dans le cadre d’opérations militaires d’influence (p. ex. OPS PSY) afin d’avantager les FC dans les campagnes asymétriques d’aujourd’hui. À la lumière des connaissances tirées du milieu des affaires, d’autres possibilités et axes de recherche font également l’objet d’une discussion.

Executive summary

Consumer Psychology Marketing Overview: An Influence Operational Perspective:

Wendy Sullivan-Kwantes; Peter Kwantes; DRDC Toronto TR 2012-011; Defence R&D Canada – Toronto; January 2012.

The purpose of this report is to compliment the previous reports of relevant scientific literature conducted by Humansystems Incorporated, Guelph, Ontario, on Influence Operations (CR-2007-146), Consumer Psychology literature review (CR 2008-218) and Annex to CF PSYOPS Materials, Information Management, Guidelines and Recommendations (CR 2008-215). Defence Research and Development Canada - Toronto is conducting a larger research project whereby the goal is to contribute to the Canadian Forces (CF) ability to plan, implement and evaluate influence campaigns for future expeditionary operations.

The business world is a potentially valuable and underutilized context in which to study their tactics for marketing, advertising, public relations, media, and exploitation of consumer psychology and apply to current CF influence operations. The main body of this report focuses on reviewing basic marketing processes and tools and touches on some new marketing trends with the goal of adapting some of these marketing techniques from the business world which has been able to profit and sustain their success due to its ability to quickly adapt to changing demands from consumers and evolving tactics by competitors.

The later half of this report strives to provide examples of how the marketing tools and techniques could be altered to provide potential guidance for CF Psychological Operations (PSYOPS).

The goal of this review was to provide a brief introduction into marketing tools and techniques and to show how they could be adapted and applied to help benefit the CF's influence efforts.

Sommaire

Consumer Psychology Marketing Overview: An Influence Operational Perspective:

Wendy Sullivan-Kwantes; Peter Kwantes ; DRDC Toronto TR 2012-011 ; R & D pour la défense Canada – Toronto; Janvier 2012.

Le présent rapport vise à compléter les travaux précédents de littérature scientifique pertinente dirigés par Humansystems Incorporé, à Guelph, en Ontario, sur les opérations d'influence (CR-2007-146), l'examen de la littérature sur la psychologie du consommateur (CR 2008-218) et une annexe au matériel, à la gestion de l'information, aux directives et aux recommandations des OPS PSY des FC (CR 2008-215). Recherche et développement pour la défense Canada — Toronto dirige un projet de recherche de plus grande envergure qui vise à contribuer à la capacité des Forces canadiennes (FC) à planifier, à mettre en œuvre et à évaluer les campagnes d'influence en prévision des futures opérations expéditionnaires.

Le milieu des affaires constitue un contexte sous-utilisé qui pourrait s'avérer utile pour l'étude des stratégies de marketing, de publicité, de relations publiques, des médias et de l'exploitation de la psychologie du consommateur, dont certains ou la totalité pourraient être applicables aux opérations d'influence actuelles des FC. La majeure partie de ce rapport est axée sur les processus et les outils de marketing de base et sur certaines nouvelles tendances en marketing dans le but d'adapter certaines de ces techniques du milieu des affaires, dont la rentabilité et la réussite découlent de sa capacité à s'adapter rapidement aux demandes changeantes des consommateurs et à l'évolution de la tactique des concurrents.

La deuxième moitié de ce rapport cherche à montrer, en s'appuyant sur des exemples, la façon dont on pourrait adapter certains de ces outils et certaines de ces techniques pour qu'ils servent à orienter les opérations psychologiques (OPS PSY) des FC.

Cet examen se veut une brève entrée en matière sur les outils et les techniques de marketing et sur la façon dont on peut s'en servir pour contribuer aux efforts d'influence des FC.

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Introduction

Background

Between 2008 and 2011, the Adversarial Intent Section at Defence Research and Development Canada (DRDC) - Toronto worked on a three-year research programme to enhanced influence operations for Thrust 15b. This document provides a review of military Influence Operations. In it, we examine the relevant scientific literature on consumer psychology and marketing, with a focus on their role in social influence.,

Objective

This report reviews the current and emerging marketing practices in the world of business and discusses their potential applications to Influence Activities in operational contexts for Canadian Forces Operations.

Scope

This literature review summarizes the current relevant scientific and business literature, including appropriate textbooks, internet and peer reviewed journal articles related to marketing techniques. The first section is an introduction to basic marketing theory, tools and techniques that provides an overview of the marketing process and an introduction to current thinking and best practice in this domain. It also has the potential to be used as a basic introduction targeted at Canadian Forces (CF) personnel with little to no background in marketing. The report concludes by considering some of the implications of current thinking in marketing for CF influence activities.

Introduction to Marketing

“Marketing is far too important to be left only to the marketing department” [1]

Success in the business world is measured by profitability and longevity. In order for a business to be successful, it must be able to quickly adapt to the changing demands of consumers and changing tactics of its competitors. This paper presents an exploration of how some of these business tools and philosophies could be applied to military influence operations like Psychological Operations (PSYOPS) to help give the CF an advantage in asymmetric campaigns. The business world is a potentially valuable and underutilized context in which to study how influence tools could be used to help CF operations. What can we learn from the tactics used by marketers and advertisers? How is knowledge and usage of consumer psychology exploited? What are the effective approaches to public relations? Finally, how is the media used to communicate a message?

Marketing is a social and managerial process in which individuals and or groups obtain what they need and want through creating and exchanging products and services with others [1]. Marketing influences almost every aspect of our lives—from the choice of goods we consume and the stores we patronize to the programs we watch [6]. Marketing is seen as a critical feature for every company and is constantly evolving in the global marketplace. Some of the main aspects of marketing in the business world are recruitment of new consumers and the retention and development of relationships with existing consumers [3]. Today’s marketing departments are focused on satisfying consumer needs and acquiring loyal consumers, as opposed to the historical goal of marketing, which ignored the consumer and focused on making a brand or product familiar to make a sale.

The Tools of Marketing

Marketing consists of both micro-marketing and macro-marketing strategies. Micro-marketing involves predicting consumer needs and providing goods and services that will satisfy them. Micromarketing also includes individual and local marketing. An example of local marketing is the manner in which Sears and other large department stores customize each store’s merchandise and promotions in order to match specific regional clientele. An example of individual marketing is customized marketing where companies such as Dell, Levi’s, Mattel, and Nike allow consumers to go online and design a customized product [1].

Macro-marketing is a multidimensional practice which examines marketing systems, their impact on society and the impact of society on marketing systems [16]. An example is the relationship between food shortages and the rising cost of food [17].

The Marketing Process: Overview

The Basic Marketing Concepts

Kotler, Armstrong, & Cunningham (2005) defines basic marketing as being driven by the following concepts: needs, wants, demands, marketing offers (products, services and expenses), value, satisfaction, quality, exchange, transactions, relationships and markets. A *market* is the set of real and potential buyers for a product or service. Marketing is the act of building and sustaining profitable relationships with consumers for the exchange of products, services, ideas or other objects [1].

To begin to understand the marketing process, one must first start with the most basic concept which is human *needs*. As defined by the marketing literature, needs are basic and can be physical, social and individual. Human needs and *wants* are influenced by an individual's culture and personality. Human needs and wants then enter into a relationship with the marketplace in the form of *demands* which are the human wants that are projected into the marketplace and backed by buying power. *Marketing offers* are a combination of products, services, information or experiences that are offered to consumers in order to satisfy needs or wants [1].

The success of a product depends on consumer value and satisfaction. *Consumer value*, as defined by [1], is the benefit a consumer gains from owning and using a product, relative to the cost of obtaining and owning that product. Consumers typically buy from the company that offers them the best perceived value [1]. *Consumer satisfaction* is defined as how well the product is perceived to perform and how well it meets the consumer's expectations [1].

Of the concepts, *Marketing exchange* is the most central one. It is the transaction of acquiring a product or service by offering something in return, such as money [1]. Through promoting their products and services to consumers, marketers aim to obtain a balance of profits from supply and demand. This requires monitoring demand levels which, over time, can fluctuate and result in no demand, adequate demand or too much demand. If there is too much demand, demarketing may be required in order to temporarily reduce demand [1].

The Basic Marketing Process

The following gives a general overview of the marketing process. According to [4] the marketing process can be broken down into a five-step model (see *Figure 1*).

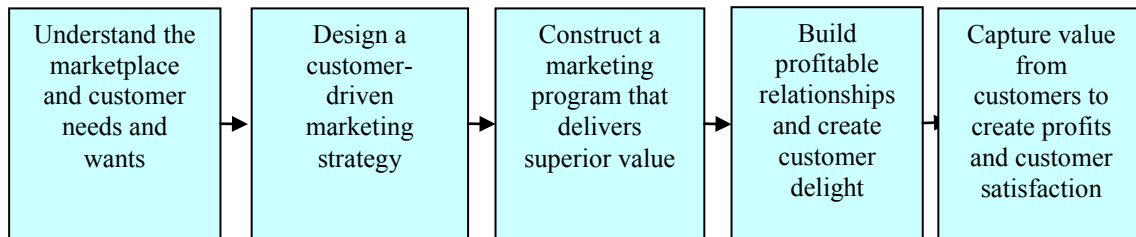


Figure 1: Model of the Marketing Process.

The first step in the marketing process consists in analyzing and understanding the marketplace in order to better understand consumer needs and wants, in addition to taking advantage of market opportunities. This consists in *market segmentation* which requires one to dissect a market into separate groups of consumers who have different wants and needs and therefore demand for different products. The second step is to design a marketing strategy that fits within the organization's goals, capabilities and is consumer driven. The third step is to develop a marketing program that satisfies the target groups of consumers. The fourth step is to build and maintain relationships with consumers to help ensure that their needs are met and they are satisfied. Lastly, it must capture the profit from the consumer satisfaction. [1].

The Basic Marketing Functions

Operational marketing encompasses all the marketing functions that are used to attract, meet and satisfy consumers as well as exploit them. Operational marketing also includes the *marketing mix* which is a set of marketing tools. Traditionally these tools were named the "4 Ps" for product, price, place and promotion [1] (see *Table 1*).

Table 1: The 4 Ps

4Ps	Product	Price	Place	Promotion
	Goods and services provided, incl. variety, quality, design, features, brand, packaging and services	The cost for purchasing the product or service incl. list price, discounts, allowances, payment options	Company activities that ensure product availability, incl. channels, coverage, locations, inventory, transportation and logistics	Communication activities that influence consumers incl. advertising, personal selling, sale promotions, public relations

However, more recently Tracy (2004) has revamped and changed this to the “7 Ps,” by adding people, process, and physical evidence, (see Table 2).

People, refers to any person who comes in contact with consumers. People are important as any contact can have a negative or positive impact on the consumer’s satisfaction. Therefore, it is important that people be properly trained, motivated and generally, the type of person a company would want to have as a representative [3]. Research has also found that the particular characteristics people choose to represent a company are important, like similarity to the target audience, professional status, organizational affiliation, incentives and social setting all play a role in persuading the target audience [15].

Process includes all processes that are involved in providing a service.

Physical evidence are case studies, testimonials, demonstrations and reviews of products and services that help influence consumers’ decisions on whether or not to purchase the product or service [3]. This type of information is becoming easier for consumers to both provide and receive, with websites now dedicated to reviews of products and services like <http://www.epinions.com> and, <http://www.tripadvisor.com>.

Table 2 The 7 Ps

7Ps	People	Process	Physical Evidence
	Any person who comes in contact with a customer	All processes that are involved in providing a service	Case studies, testimonials, demonstrations and reviews of products and services that influence customer decision making

Other marketing literatures claim that there are yet another four P's, the so-called "4 new P's", consisting of personalization, participation, peer-to-peer and predictive modeling [3], (see Table 4).

Personalization is becoming more popular and companies are taking advantage of this customizing ability of their products and services, especially through the internet (e.g., Dell on-line, Amazon).

Participation is becoming more common with marketing firms, whereby customers are asked to participate in determining product specifics, such as what the brand should stand for, product directions, and advertising.

Peer-to-peer is tagged as being a potential new force in marketing as social networking sites and communities are used by consumers and provide a new environment in which to place advertisements.

Predictive modeling refers to neural network algorithms that are being applied to marketing issues with the goal of making predictions and generalizations [3].

Table 3 The 4 new Ps

4 New Ps	Personalization	Participation	Peer-to-Peer	Predictive Modeling
	Companies customizing their products and services	Seeking customer opinion/participation in product development, direction, branding, etc	Using benefits from social networking, blogging etc	Using neural network algorithms applied to marketing issues

Customer-Focused Marketing

The recent customer-focused marketing that is replacing the traditional product-focused ("4 Ps") marketing is abbreviated to SIVA- Solution, Information, Value, and Access, (Table 4).

Solution looks at how appropriate is the solution to the consumer's issue or needs.

Information refers to how much information a consumer needs and from whom, in order to make an informed buying decision.

Value includes investigating whether or not the consumer understands the value of the transaction, the cost, benefits, rewards, etc.

Access includes the logistics of finding and obtaining the service, product or information.

Table 4 SIVA

SIVA	Solution	Information	Value	Access
	Evaluates appropriateness of solutions to customer needs/issues	The amount of information a customer requires for informed consumer decision making	Customer's understanding of value relating to cost, benefits, rewards	Logistics involved in locating and obtaining a service, product or information

The Market Implementation and the Marketing Environment

Once the details of the marketing strategy have been decided upon, the next step is market implementation, which is the process that actions the marketing strategic objectives. The success of the implementation will depend on the decisions the company makes regarding the “who, where, when and how,” in addition to how well the company is able to integrate its people, organizational structure, decisions, rewards systems and culture into a well designed program [1]. A number of factors can affect, positively or negatively, the outcome of marketing ventures. A key aspect is the so-called, marketing environment which includes the many factors outside the marketer's control.

The microenvironment comprises the company and other aspects such as its competitors, consumer markets, and market channel firms that are closely connected to the company's well-being.

The macroenvironment includes the larger societal issues that can affect the microenvironment, such as demographic, economic, natural, technological, political and cultural forces.

The economic environment includes all factors that have an impact on consumer buying power and spending patterns.

Finally, the cultural environment refers to institutions and other forces that impact society's values, perceptions, preferences, behaviours, and core and secondary beliefs (Figure 2 adapted from [23]). A consumer's core beliefs are often strongly influenced by his or her parents and further reinforced by schools, churches, business, and government and are difficult to change. The secondary beliefs and values that people hold, are formed over time, and often vary according to context and are therefore more easily influenced. As a result, marketers should put their focus on changing secondary beliefs, in order to increase their chances of success. Marketers ideally want to predict and anticipate cultural shifts so as to take advantage of new opportunities or avoid potential risks [1, 4].

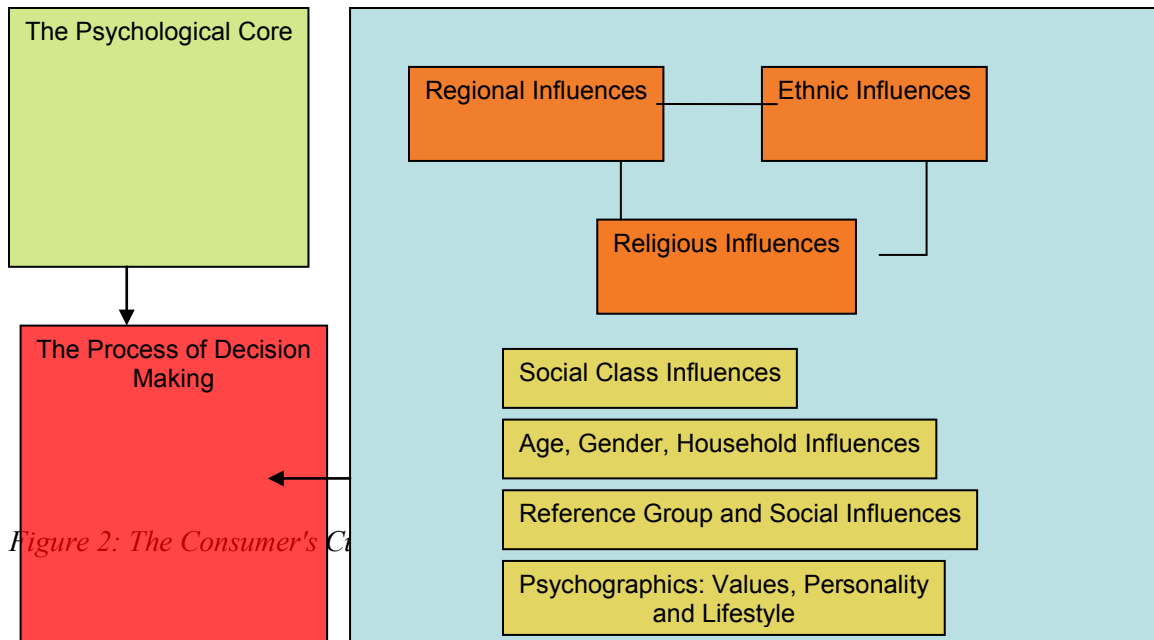


Figure 2 Cultural and environmental model

Marketing Communications Mix

With advances in technology and changes in society resulting in increased time spent on the internet, non-traditional forms of advertising are being increasingly used—so much so, that many non-traditional forms of advertising blur the boundaries among advertising, entertainment and information [28].

Advertising, sales promotions, public relations, personal selling and direct marketing are all part of a larger marketing communications mix.

Advertising is defined as paid types of non-personal presentation and promotion of ideas, goods and services by a particular sponsor [1].

Sales promotions are short-term incentives that try to encourage consumers to purchase a product or service.

Public relations are communications involved in building positive relationships and positive publicity regarding a company's corporate image. This also involves the handling of unfavourable rumours, stories and events like, for example, the recent Listeriosis outbreak at Maple Leaf Foods which precipitated the creation of television advertisements aimed at restoring the company's image.

Personal selling refers to the personal representation of the company's sales team whose purpose is to make sales and provide positive customer service.

Direct marketing involves direct communication with specifically targeted individual consumers, by means of telephone, mail, fax, or email with the intention of receiving immediate response from the consumer and building long-term customer relationships [1].

Marketing Management

The goal of marketing management is to design strategies that result in profitable consumer relationships. Kotler et al. (2005) claimed that there are five concepts under which organizations base their marketing philosophies: production, product, selling, marketing and societal.

The production concept focuses on production and distribution efficiency, adhering to with the notion that consumers will choose products that are both readily available and affordable.

Product concept refers to the idea that consumers are interested in the product's quality, performance, current technology and improvements.

The selling concept focuses on promotion and the large-scale selling needed to ensure success with consumers. Companies that adhere to this philosophy often market goods that they decide to make as opposed to filling demands by consumers. This means that they rely on selling a large volume of items instead of focusing on what consumers actually want. In contrast, the market concept is customer-focused and strives to meet the needs and wants of particular markets with the goal of being profitable by being more effective and efficient than competitors.

The societal concept is more holistic and focuses on balancing profits with consumer satisfaction and society [1].

In order to be competitive in our global marketplace, most companies have moved from the traditional selling concept to the marketing concept. This new way of looking at marketing has expanded to include customer relationship management. Customer relationship management is “the overall process of building and maintaining profitable consumer relationships by delivering superior customer value and satisfaction.” [4]. This is based on the idea that losing one customer means more than losing just one sale, it means losing every purchase that customer would have made over their lifetime of patronage. It is also based on research claiming that it costs five to ten times more to attract a new customers than keeping a current customer satisfied [1].

Companies today are aligning to the new way of market thinking [4] and are seeking to not only capture the current customer’s sale, but to capture the customer’s loyalty for a lifetime of purchases. This means being customer-focused, targeting selected markets or individuals, growing to serve local and global markets, being socially and

environmentally responsible, developing relationships with customers, and focusing on customer satisfaction and value [4]. Companies are also reaching out to consumers more by involving them in their product development [5]. In addition to focusing on maintaining satisfying customer relationships, many companies also offer loyalty and retention programs as incentives to remain dedicated to a particular company (or companies) for their goods or services. Some examples of such programs are Aeroplan, Airmiles, Shoppers Optimum Card, Petro-Canada's PetroPoints and Canadian Tire money.

In order to be competitive and successful in the new global marketplace, many companies are finding that they need to be partner-focused, both within their own company and externally with other companies, in order to create a more valuable and satisfying experience for consumers [4]. In other words, companies are increasingly forming strategic alliances with other companies that complement their strengths and help compensate for their weaknesses [1].

In order to flourish in the global marketplace, companies often find themselves competing with other companies for a larger share of the market. This requires them to be conscious of their competitors' strategies. Kotler et al., (2005) identifies two types of companies: market challengers and market followers.

Market challengers are companies that directly compete with, and aggressively attack, other brands in order to get a majority share of the market (e.g., Pepsi vs. Coca Cola).

Market followers are companies that follow their competitors' strategies (e.g., by providing similar offers, prices, or marketing programs) with the goal of obtaining a stable share of the market.

Communication

Communication is one of the key factors in marketing. There are a number of steps that must be taken in order to develop an effective marketing communication strategy where the goal is to convince the consumer to purchase. These steps include: identifying the target audience, determining the desired response, designing a message, message structure, and message format, message source, and feedback, (Table 5).

It is important to identify the target audience in order to ensure effective communication and marketing strategies [1]. The target audience will often be a set of consumers who share similar needs or characteristics [4] and will range from individuals to groups or the general public, and who the audience is, will affect communication decisions regarding what, how, when, where and who will communicate the message.

After the target audience is determined, the focus is on determining the desired response from the consumer, which in most cases for marketers, would be the purchase of a product or service.

However, whether or not a consumer makes a purchase depends on his/her stage of buyer readiness. There are six stages of buyer readiness that are affected by marketing communications: awareness, knowledge, liking, preference, conviction and purchase [1]. Once the audience and goal of the message are determined, the message must be designed with the intention of getting attention, holding interest, arousing desire and producing results. Kotler et al., (2005) suggests there are three different strategies that marketing communicators use to appeal to the consumer: rational (that appeal to consumers' self-interests, such as quality, economy, value, performance, etc.), emotional (intention is for a positive or negative reaction such as love, joy, humour, guilt, fear, shame, etc.) and moral (appeals to a consumer's sense of right and wrong, support for causes, environment, human rights, safety, etc.).

Message structure is the next step and requires decisions about whether 1) the message will give the consumer an outcome or will leave it to the consumer to draw his/her own conclusion 2) whether to present a one-sided (more effective) or two-sided argument (strengths and weaknesses e.g., Buckley cough mixture which, "tastes awful, but works") or 3) whether to present the strongest argument first or last.

Message format is the next important step and it is imperative that a strong format be used for the message (concerning the headline, copy, illustration, colour, etc.) in addition to the media communication used, either personal or non-personal. Personal communication involves two or more people who communicate directly with each other through sales personnel, consumer advocates, consumer literature/websites or word-of-mouth. Kotler et al., (2005) suggested that personal communication carries with it more possibility for influence, especially for particular products that are expensive, risky or highly visible. To help with personal influence, some marketers use techniques such as buzz marketing, which is cultivating people (often opinion leaders or mavens) to draw attention to and spread information about a particular product or service. This technique has worked reasonably well among youth, especially as some of the traditional forms of advertising are losing their appeal whereas buzz marketing deals with social and family networks and this is quite powerful. Another appeal of buzz marketing is that it is economical as it often costs approximately one-tenth of a traditional marketing campaign. Buzz marketing has been linked to the success of The Blair Witch Project film and Harry Potter novels. Non-personal communication consists of messages that do not have personal content or feedback, such as major media: print (newspapers, magazines, and direct mail), broadcast radio and television, displays (billboards, signs, posters) and online services and websites [1].

Selecting the correct message source to deliver the message is the next step after deciding which message structure to use. This is key because picking the wrong message source

could backfire, cause embarrassment or even negatively impact the company's image. A good example of advertiser's sensitivity to message source can be seen in the advertisements for Keith's India Pale Ale that used an actor portraying an angry Scot. The actor was charged with the possession of illegal pornography, and within days, the television spots were pulled from the air. Research has found that message communicators who are perceived as highly credible are more persuasive (e.g., using health professionals to recommend products to patients or celebrities to recommend products) [1].

Table 5 Steps for developing effective message

Identify TA	Determine DR	Design Message	Message Structure	Message format	Message Source	MOE
Determine TA	Is goal to influence, make sale, consumer satisfaction, loyalty	Decide intention of message: getting attention, holding interest, arousing desire or producing results	Allow consumer to draw conclusion about product	Determine message headline, color, illustration, medium	Evaluate best message source given the TA	Given the message, determine best way to measure MOE
Investigate which methods are best to achieve desired effects	Determine stage of "buyer" readiness	Decide between 3 directions: rational, emotional or moral	Present one (more effective) or two sided argument	Personal or non-personal communication		
			Present strongest argument first or last	Choose atmosphere		

Note: TA = target audience; DR = desired response, MOE = measure of effectiveness

The last, but still important, step in this process is to collect feedback on how successful was the marketing campaign. Helmus, Paul, Glenn, & McKernan (2007), claims that for the military, determining the measure of effectiveness is ensuring that findings are valid and not confounded by other possible causes. In marketing research companies, this step is often accomplished via the internet, which involves collecting data on target audiences regarding whether or not they remembered the message, how many times they viewed it,

what they recalled about the advertisement, how they felt about it, their past and present attitudes regarding the product, whether or not they purchased the product or service, talked about the product or service, and visited the website/store if applicable [1]. Helmus et al. (2007), however, suggests that for PSYOPS, using qualitative tools such as direct observation, interviews and other methods may be more effective.

Word of Mouth

Word of mouth (WOM) is the oldest form of marketing and is still a critical strategy for marketers. Companies will seek out WOM influencers, people who appear to have a unique ability to influence people, often through a combination of three characteristics: infectious communication style, their opinion has more weight than the average person's and they have a large social network. Recent research has put WOM at the top of the list for having the most impact on a person's purchasing decision, especially in cultures where personal relationships are highly valued [13].

WOM works both positively and negatively and some products and services are more susceptible to the impact of negative WOM, such as innovations, services, movies and travel/vacation destinations [14]. Other research has claimed that negative WOM information is weighed more heavily than positive WOM information and that WOM information has a greater impact than printed information [15]. A study by Smith and Vogt (1995) found that negative WOM significantly reduces the perceived credibility of advertising, brand attitude and purchase decisions and that when consumers have an unsatisfactory experience they will often convey this to others. This article also stresses that more research is needed to discover ways to reduce the harmful impact of negative WOM.

Marketing Mistakes

The business world is full of successes and failures. Marketing is no exception. Marketers need to be aware of the impact that their marketing decisions can have on the public because they can have long lasting negative impressions against advertising and other marketing tools.

One common mistake that marketing companies make is known as, "marketing myopia". This occurs when companies focus more attention on the product than on consumer benefits, experiences and needs [1]. Some notable examples of marketing mistakes are: General Motors trying to move its automobile, the Chevrolet Nova, into a Spanish-speaking market, but failing because, in Spanish, *Nova* can be translated to, "doesn't go" [19], or Gillette brand trying to sell "For Oily Hair Only" shampoo, which failed because people prefer products that advertise for such things as oily hair, body odor or diarrhea more discreetly [1].

Another noted mistake is the attempt to create new consumer needs without first appealing to existing ones. Kotler et al., (2005) suggests that in order to be most effective, marketers should first appeal to consumers' existing needs and wants as opposed to creating new ones that they may or may not desire.

Given that today's technology companies must know that consumers will often be aware of a product's positive and negative aspects quite quickly, they should be concerned that lower quality products and services can (and will) be discovered quickly, discussed in social media and do poorly in the marketplace [1].

New Business Trends

The business world has evolved and adapted in the past years to fit into the global marketplace. Competitive marketing has gone beyond the traditional promotion of a product or service and is now trying to create for consumers a meaning and experience for brands [1]. Examples of branding would be the car brand Lexus offering luxury cars and service, Westjet offering low-cost and consumer-focused service [4].

The methods of delivering a message to a target audience have also changed. Although with the increased usage of social media, technology marketers are developing new ways to incorporate persuasive messages into advertising, entertainment and information. In many cases, the consumer may be unaware of being targeted by subtle brand placements in such outlets as movies, video/computer games, and websites. Children, it seems, are especially vulnerable to these types of persuasive message strategies [28].

Marketing companies, in general, are moving away from mass marketing and moving towards more focused marketing with the purpose of building close relationships with their consumers in micromarkets. This includes segmented marketing, which entails targeting specific population segments and designing special offers for each and monitoring their consumers at the individual level [1]. Because of advances in technology, marketers now have more innovative ways (through data bases that keep track of electronic cash registers, banking transactions, loyalty cards, and internet tracking) to keep track of consumers' spending patterns and therefore, can create customized offers to individual consumers [4] (e.g., Amazon makes recommendations for one's purchases based on what one buys, and on what others have bought).

Another new business trend, which has potential for marketing purposes, but is currently mostly used to create social influence, is mass collaboration. Mass collaboration is currently being used by many companies and organizations and involves taking advantage of the changes in technology, demographics, businesses and the economy. Current examples of this form of low-cost collaborative infrastructures are Myspace, Youtube, Linux and Wikipedia. The basis of this new "participation revolution" is that it has the potential to allow an unlimited number of individuals to play active roles in contributing to their workplaces, communities, blogs, etc. in order to help co-create

products, access markets, discuss ideas, contribute opinions, etc. and reach out to the global marketplace [5]. A recent example of this type of collaboration concerns the Toronto Police Homicide Squad, which launched a website in November 2008 to help solve homicide cases. This website consists of information regarding wanted suspects, unsolved cases, rewards and information for victim's families. The purpose is to help generate witnesses and information with the tips the public provide being sent to the homicide squad [18].

Tapscott and Williams (2006) coined this revolution "Wikinomics" and stated that "A wiki is more than just software for enabling multiple people to edit web sites. It is a metaphor for a new era of collaboration and participation" (Tapscott & Williams, p.18). They also claims that due to the many changes in the economy, and the switch to a global marketplace, many businesses are having a difficult time relying only on their internal capabilities and therefore find that, in order to stay competitive, they need mass collaboration. Many companies should therefore take advantage of this new way of working, collaborating and peer production, because it allows companies to exploit human skill, ingenuity and intelligence of a larger group of people, often at little or no cost. They suggest that the traditional organizational values, skills, tools, processes and command-and-control style of economics are outdated and actually hinder creativity. Instead, flexibility, and connectivity are required to remain competitive in today's global marketplace.

Wikinomics is founded on four new ideas: openness, peering, sharing and acting globally. In order for the Wikinomics concept to be successful, companies are required to be more open, transparent, flexible, engaging and accessible. This goes against the traditional philosophy that companies and organizations, such as the military, have adhered to, which was that their information should be secret and operate behind closed doors.

In order to take advantage of mass collaboration, businesses have to divulge some information. Sharing information may appear risky, but at times doing so pays off with lowering costs, increasing trust and loyalty and improved innovation. An example is Goldcorp, a small Toronto-based gold mining firm, that found itself struggling to survive with its current operations and marketplace. Their fifty-year-old mine appeared to be dying but the Chief Executive Officer (CEO) was determined to find more gold. The company found more but it was unable to gain access to it. After years of exploration, the CEO heard of the success of the development of Linux as a free Operation System for desktop computers developed by volunteers and attempted to use the technique to his advantage. He shared all their secret data with the world through an internet challenge. Prize money in the sum of CA\$575,000 was offered and within weeks entries started to flood in from geologists, graduate students, consultants, mathematicians, military officers, and others. The results were that new capabilities, never seen before in the industry, were developed, resulting in over 80 percent of the identified targets yielding substantial amounts of gold. The CEO estimated that this process advanced his company

forward by two to three years and he credited the move to openness in helping boost his company from a CA\$100,000,000 company into a CA\$9,000,000,000 one [5]. Today's consumers are also demanding more transparency in addition to options in their products and services. They are also less trusting of organizations, businesses and the media, looking more towards peer-to-peer opinions (e.g., epinions.com) and social networks.

The peering concept of Wikinomics encourages a horizontal type of organization, as opposed to the traditional hierarchical type. Tapscott and Williams (2006) used Linux as an example of this type of organization, where an informal group of individuals manages ongoing software development by incorporating input from thousands of their volunteer programmers. The benefit of this type of peer-to-peer organization is that it is able to develop state-of-the-art, in-demand products at little cost to the organization. The authors also claim that peer-to-peer communities work well because they are able to effectively use a self-organization for production for some goods, such as information, which tends to be more effective compared to hierarchical management.

Sharing of information is the third critical idea of Wikinomics. Sharing is similar to openness but deals primarily with an organization's intellectual property (IP). Most companies and organizations (such as the government and military) are reluctant to divulge their IP. However, some companies are now experimenting with this idea, as they find that by releasing some of their IP information they are able to be more efficient and innovative in their development, given that real collaborative work cannot take place without some sharing. An example would be pharmaceutical companies and medical researchers sharing research and development [5].

Acting globally is the last key aspect to this new way of doing business. Tapscott and Williams (2006) suggest that companies should not limit themselves, location-wise, and take advantage of mass global collaboration as a new way to conduct business, tap into new marketplaces, and access a potentially low-cost labour market.

Overall, the concept of Wikinomics or "peer-production" is about breaking away from the traditional hierarchies and adopting a partnership philosophy. The people who tend to contribute and participate in these peer-to-peer communities often do so out of personal and self-interested reasons, such as passion for their area of expertise and genuine interest in contributing to the advancement of their area of interest. Although scientific communities do share information, ideas and data, a more systematic collaborative, sharing, and open environment could provide great benefits and open new doors to sharing, collecting, managing data and the advancement of knowledge. Governments could also benefit, as they could create new platforms for participation and public knowledge [5].

Blue Oceans

Another new trend in the business world is the idea that in order to beat the competition, one needs to stop trying to beat the competition. One way to do this is to create a new market space and make the competition irrelevant. This is the concept of “blue oceans” where “blue oceans” are the untapped marketplace that can be created within or outside “red oceans”. Red oceans are the already existing marketplaces that operate with already defined and accepted rules competing with other companies by trying to outperform them in order to grab a bigger share of the marketplace. In order to become a blue ocean, companies must move beyond the traditional accepted boundaries, across alternative industries, across strategic groups, across buyer groups, across complementary product and services and across time [6].

Like Wikinomics, the idea of blue oceans stresses that the business environment is evolving and that the old strategies and management approaches of the 20th century are becoming outdated, hence, their relevance and effectiveness are threatened [6]. This can also be applied to warfare waged against terrorists. Terrorist groups do not play by conventional military rules of engagement and have created their own “blue ocean” by using asymmetric warfare tactics (e.g., through the use of improvised explosive devices). These devices do not compete with the traditional methods of war fighting that use tanks, foot patrols and armoured vehicles. In some ways, the change has made the traditional warfare techniques irrelevant.

The strategy of blue oceans is to make the competition irrelevant by opening up an uncontested marketplace and therefore creating value innovation. This requires a new approach to thinking and executing a strategy as one no longer has to be restricted by the current market boundaries and can therefore break away from the competition and reconstruct a new marketplace [6]. This is accomplished by using a four action framework: eliminate, reduce, raise and create. Eliminate requires exploring the factors that the industry takes for granted and compete on (even though they may no longer be valuable) and eliminating them. Reduce and raise refers to reducing factors which exist that over-serve consumers and unnecessarily increase the costs and then raising other factors above the industry’s standard. Create requires creating new factors which the industry has never offered with the goal of discovering entirely new sources of value for buyers in addition to creating new demands and shifting the strategy of the industry. Kim and Aubergine (2005) claim that an effective blue ocean strategy requires focus, divergence (need to do more than just keep up with the competition or you will lose uniqueness) and a persuasive tagline that delivers a clean and truthful message.

Cultural Considerations

For better and for worse, marketing has become perhaps the greatest force of cultural stability and change at work in the contemporary world [9].

The issue of cultural considerations is critical for many global companies. Cultural differences in responses to marketing strategies are significant enough to have major impact on a campaign's success. Many large companies (such as Coca Cola) can earn more than half of their profits outside their own country. Therefore, being aware, sensitive, innovative and culturally knowledgeable can have an enormous impact on their success in the global market [10]. Companies need to take into account cultural differences when operating internationally as international consumers have different attitudes, perceptions, preferences, language, values and beliefs that will impact how a product or service will or will not be accepted [1]. As several authors point out, family and friends play a role in consumer marketing [1, 8]. The consumer psychology literature and the marketing literature agree that one's culture, family and friends are largely influential on beliefs, attitudes, values, perceptions, preferences and behaviour. Many marketing companies have learned the importance of taking culture into consideration the hard way when entering a foreign market. For example, McDonald's and Coca-Cola offended the Muslim community by putting the Saudi Arabian flag on their packaging. The flag includes a passage from the Koran; hence, putting the Saudi flag on the wrapper meant that a passage from their Holy Writ on the flag would be wadded up and tossed into the garbage [1]. Many companies have made significant marketing errors, causing embarrassment, negatively impacting their reputation and losing money. Although the marketing literature acknowledges this as a significant issue, there is a dearth of literature on the topic.

Understanding a culture's social interactions and communication practices is imperative to influencing the acceptance of new products, services, and companies in the global marketplace [10]. WOM is very important in both the North American market and the global market, but the extent of its impact depends on the particular culture. There is no sole current model or framework for WOM impact but Rogers (1995) proposes a framework regarding the adoption and diffusion of new products. This five-stage process consists of: awareness, interest, evaluation, trial and adoption.

Adoption of a product is the acceptance and integration of a product into a marketplace, while diffusion is the spread of a product within a community. Yalcinkaya (2008) reviewed current research looking at the adoption and diffusion rate of products internationally and has found that new products diffuse at different rates in different countries and that culture plays a role but more research is needed to explore the multiple factors that impact diffusion rates.

A Cultural Framework. Hofstede (2001) developed a potentially useful cultural framework that examines cultural dimensions in which countries differ. These five dimensions are: individualism, power distance, masculinity, long-term orientation and uncertainty avoidance. Individualism/collectivism contrasts individualistic cultures (where independence is highly valued, people are expected to look out for themselves, and put their own interests before those of others) and collectivist cultures that typically value loyalty, solidarity, interdependence, conflict avoidance and group identification.

This is important information for PSYOPS to consider when interacting with different cultures as collectivistic cultures will tend to form stronger relationships and are highly communicative. Therefore, WOM is very important and should be exploited to gain support for CF/allied operations from locals. However, they have to concurrently prepare to counter negative WOM.

Power distance is the degree to which people in a society accept power distributions. Societies having a high degree of power distance value status, authority, autocracy and people often follow the desires of their leaders. In low power distance cultures people are more willing to challenge authority, more independent and are susceptible to being influenced in their decision making. Masculine cultures value competition, ambition, career advancement, achievement, assertiveness, heroism, and material possessions. By contrast, feminine cultures value caring, sympathy, and intuition and are less concerned with traditional western values and therefore less inclined to adopt new products. Uncertainty avoidance discussed by Hofstede (2001), is the degree to which a society feels threatened by uncertainty and, in return, adheres to rules, regulations and religion. Some societies are high in uncertainty avoidance and therefore are less likely to take risks and accept uncertainty and therefore are more suspicious of the introduction of new products and services into their society. They also tend to communicate more with one another and therefore the consequences of negative WOM are potentially significant. Societies that are low in uncertainty avoidance tend to accept risk more readily. Lastly, [12] suggests that long/short-term orientation also is a factor that needs to be considered in cultural considerations. Long-term societies tend to focus on practical future focused outlook and value slow results and slow changes. By contrast, short-term societies focus on the past and present and are more readily open to changes.

Nobody would argue that a marketing or influence campaign occurs in a cultural vacuum. Measures are always taken to try to understand of the target audience as a collective. The brief discussion in this section may serve as a useful general framework within which to organize the various cultural factors that must be taken into consideration.

Conclusions: Implications for Military Influence Capability

This report, in conjunction with CR-2008-215 [26], provides a general overview of consumer psychology and marketing terms and techniques that could be of use to CF influence operations. The business world is constantly adapting to stay competitive and relevant. By adopting some flexibility in their business models, the CF can develop strategies to augment the repertoire of techniques for influencing others. In what follows, we discuss the alignment of some of the challenges the CF and marketers face conducting campaigns. We must point out that we are not arguing that information operations are exactly like marketing. Nor are we proposing that many basic principles of marketing are not already used in the CF's influence operations. The purpose of this document is to expose those involved in information operations to aspects of marketing that could be relevant. Marketing is so ingrained in our everyday lives that most people are probably unaware of the influence it has on our daily decision-making. As a social process, many ideas of marketing are analogous to current CF influence operations (e.g., PSYOPS). As such, it may be advantageous for marketing firms and the CF to collaborate on tools for campaign planning and to co-develop influence techniques.

By taking the general philosophy of marketing management discussed above, a focus is placed on satisfying consumers' (or locals') needs. Doing so helps to acquire loyal consumers by building long-term trusting relationships through the delivery of superior consumer value, satisfaction, and in the case of influence operations, perhaps also security. Part of the value, satisfaction, and security comes from a consumer-focus, service to the local population, social and environmental responsibility and giving consumers enough information to allow them to make informed decisions. Done this way, each consumer is more than just "one sale" but a lifetime of sales or loyalty which, for marketers, costs significantly less than attracting new consumers, and for the CF prevents the loss of a heart and mind to the red team.

How is Marketing NOT like Influence Operations?

We acknowledge that there are some fundamental differences between marketing and information operations conducted by the CF. First, unlike those in the marketing profession, the CF often has control of the medium by which a message is broadcast. For example, RANA Radio in Kingston was a radio station owned by the CF as part of an influence operation for an Afghan target audience. As such, the CF can maintain control over the message that local population will hear on that radio frequency. Ownership of the medium is less common in the marketing context. For example, Apple does not own television stations and use them to push messages about their product. Nor do they own the billboards upon which their outdoor advertising is posted. The time and space is rented.

In order to increase its chances of being successful in a competitive environment, the CF will often form strategic Wikinomic alliances with other militaries or organizations with similar goals. Collaboration in multinational operations is common in the military, and it behoves the allied militaries to develop techniques and technologies that promote it and enable it to be used to its full advantage. For example, technologies that allow teams to collaborate remotely in virtual meeting rooms should be developed and explored as means by which information can be shared across groups and locations. The particular kind of Wikinomic collaboration discussed here is, of course, very different from its use in a strict marketing context. In the military context, the competitors are those groups with agendas or messages that are in opposition to the CF and allied nations, not the allied nations. All the nations within an allegiance have similar goals, and it matters very little which nation's technique is the most successful in changing the hearts and minds of the local population. What matters is that the change happened at all.

The business world continuously measures its successes and failure. Fortunately for it, it has, good measures of the effectiveness (MOE) of its advertisement campaigns through relatively easy administration of surveys, focus groups, online questionnaires and, of course, sales. Developing valid and reliable MOEs for influence operations however is much more difficult. Apart from measureable decreases in undesirable behaviours like insurgent attacks, current PSYOPS do not always have straightforward ways through which to measure the effectiveness of their influence. This is problematic because MOEs combined with lessons learned, are extremely important especially when operating in new areas. Collecting feedback on PSYOPS operations will help to assess the effectiveness of campaigns, which will aid in guiding where to focus resources. In the Western world, marketing companies often use the internet to collect data on target audiences. In many locations however, this would not be feasible for the CF and other, more qualitative, ways of measuring effectiveness have to be used like direct observation, polling surveys, and interviews with locals. Again however, many of the environments in which the CF conduct operations are not permissive enough to collect good data through such methods.

Information Operations as a Marketing Process

Despite the differences, the synergy between the activities engaged in by influence operations and marketing have enough in common that it is important to examine what ideas from the marketing world can be incorporated in a campaign.

The marketing process model discussed in the section above entitled, The Basic Marketing Process, is a framework that can be used to conceptualize how influence operations can be organized and carried out. The first step, already done by the CF in operation, is to develop an understanding of the target audience, its needs and wants—be they physical, social or individual and how they are influenced by culture and personality. The next steps involve designing an influence strategy and program that fits within the organization's goals and capabilities, but is focused on influencing local

attitudes through the satisfaction of local wants and needs to create valuable, satisfying, high quality communications with the local populace. The positive relationships would, hopefully, foster a sense of trust and loyalty enough to influence neutrals, adversaries or potential adversaries. The ultimate goal state is one in which the CF profit from the safety associated with the locals' positive attitudes toward them. In sum, the parallel between the goals of marketing and PSYOPS is clear.

Product-focused Marketing and Influence

Operational marketing is made up of all marketing functions that are used to attract, meet, satisfy and exploit consumers. The 11 marketing Ps (see *Tables 1* and *2*) that represent the product-focused approach can also be applied as a rough planning aid for influence operations:

Product : The services and goods the CF can provide.

Price: The cost to the CF and the cost to the target people they are attempting to influence.

Place: The location, transportation, and logistics involved in spreading a message within a community.

Promotion: What are the communication activities that the CF will engage in to promote the message? Advertising? Public relations? Personal Communication with locals?

People: Refers to the CF member who comes into contact with others. It is necessary to ensure that he/she is properly trained, motivated and possesses the ideal characteristics to carry out the operation successfully. Otherwise, there is a risk of negatively impacting the organization's image and message impact.

Process: Consider all processes that are involved in carrying out an operation. For example, if what is delivered to a population is a new school as part of an influence operation. Process refers to all the processes involved in building the school.

Physical Evidence: Keeping awareness of the current research available on influence, culture, target population, adversaries, MOE, etc. that would influence decision making. More practically, however, this includes being able to point members of the target audience to examples or people who have benefited from what the CF have to offer as part of the operation. Alternatively, it provides the means by which members of the target audience can see the benefits of working with the CF, or at least accepting what it has to offer them.

Personalization: The work towards tailoring efforts to particular groups or even individuals with the goal of creating relationships that include trust and loyalty. Again,

doing so successfully requires an accurate understanding of the beliefs and attitudes of the target audience.

Participation: Involving the target population in decision-making processes so it feels involved and to help provide it with the needed services.

Peer-to-Peer: Create or exploit social networking and accessible communities of the target population.

Predictive modelling: Engage with the defence scientific community to develop or use existing formal models to help formulate campaigns and predict their effectiveness.

Consumer-focused Marketing and Influence

Perhaps more aptly named Target Audience-focused marketing, the SIVA approach mentioned above focuses on consumer service and involves ensuring that consumers have everything they need in order to decide to receive a good or service, and the means by which it can be used. In other words, the operation must provide target audience members with:

A Solution that effectively and appropriately addresses an existing deficiency or desire on the part of the target audience member.

Information required by the target audience to aid in its decision making about the good or service being offered/provided.

Value, benefits and/or rewards for accepting the good or service.

Access to the good or service. In the case where access is limited, take steps to provide logistical support to make the good or service available.

The business and consumer world believes that the success of a particular product depends on what there is to gain in the relationship, relative to the cost, and if the relationship lives up to the value and satisfaction. One issue that needs to be considered is, if any penalty is too high for the locals to engage in this relationship, success is unlikely and therefore the strategy should be reconsidered or reworked.

The Marketing-Influence Environment

After a strategy is decided upon, several factors outside the CF's control need to be considered before its implementation. As discussed above, these are:

The micro-environment: the organization, adversaries, and partners involved.

The macro-environment: which includes larger societal issues such as demographics, economic, natural, technological, political and

Cultural forces: Economics and cultural environment (culture's values, perceptions, preferences, behaviours, core and secondary beliefs).

Like the business world, cultural considerations have an enormous potential impact on the military's ability to influence target populations. Even in marketing, research is limited and the majority of the discourse is based on Western values and markets. Some cultures are more heavily influenced by their core beliefs than others. Core beliefs, such as those strongly influenced by parents, schools, religion, churches, business and government are much more difficult to influence compared to secondary beliefs and values that are believed to be more malleable and context-dependent. In practice, marketers focus on trying to influence secondary beliefs instead of core beliefs to improve the chances of success of a campaign. For example, a target audience may hold the unwavering core belief that Western culture is malevolent by nature. However, whether or not they believe that the CF are in their community to provide help, is a secondary belief that an effective influence can change depending on how the CF are portrayed or conducts themselves. With respect to PSYOPS, the determination of core and secondary beliefs should be a key aspect of Target Audience Analysis

Communication

Communication, as discussed above, is a key factor in marketing and is especially critical in cross-cultural contexts. As mentioned previously, the marketing literature identifies particular steps that need to be taken to help plan communication, such as: identifying the target audience, determining the desired response, designing the message, message structure, and message format. Culture and language differences have to be taken into consideration for all of the steps in designing an PSYOPS campaign. In order to reach the correct target audience and have the desired responses, or influence, enough information concerning cultural differences would have to be known.

Communication marketing experts also suggest using one of three directions to appeal to the target audience: rational, emotional or moral. More research on the best communication techniques for various target audiences (neutrals, adversaries and retaining loyalty from friendlies) would be helpful. Specifically, we need to ask how Western and other cultures differ with respect to the effectiveness of the various techniques. For communication purposes, message structure and format, which we discussed above, also need to be taken into consideration in order to create the most effective messages and will likely also be influenced by culture.

Buzz Marketing

Buzz marketing is another marketing technique that PSYOPS can use to their advantage. This would require finding and ensuring that the “opinion leaders” support their operations and using these leaders to spread information. Western marketing research has found that buzz marketing is particularly effective with youth and rates highly for having the ability to influence people, especially within cultures where social and family networks are both extensive and highly valued. This could be extremely useful to PSYOPS. However, when entering new geographic areas and operations, the ability to locate those people who will help make WOM effective could prove to be difficult. More research is required into how WOM and buzz marketing work in cross-cultural areas of interest, in addition to ways to reduce the impact of negative WOM for the CF.

Wikinomics

The marketing literature is constantly adapting to the changing global marketplace and Tapscott and Williams (2006) claimed that the use of Wikinomics is one way to take advantage of new technology as well as one way to advance it. Wikinomics is the use of peer-to-peer collaborative networks and blogging to capture a moment-to-moment picture of what is going on (people, thoughts, theories, location, and environment). The CF could use this technology in a variety of ways, for instance, it could be used for information sharing within the general public, within the CF, with other militaries in joint operations, or with multinational organizations that share similar mandates and goals (e.g., United Nations). Wikinomics could also be useful for providing a shared space to document, share, update and improve lessons learned for the CF. Other applications would be to increase cultural understanding for target audiences and as a tool to collaborate with scientists, academics, media and in some circumstances even the general public for intelligence gathering, idea sharing and problem solving. Fabrigar and Porter (2008) also suggests that the CF needs to establish a formalized system for documenting important information.

Culture and Oppression

When working with and within other cultures an organization must consider whether or not its actions are perceived as oppressive. Oppression involves a relationship of where people are divided into dominant and subordinate groups. It is socially constructed, affects all aspects (psychological, social, economic and political) of a person’s life, both privately and publicly. The oppressors in a relationship attack the subordinate’s identity. The subordinate can accept, accommodate or reject oppression. Those who decide to “reject” oppression will resist, attempt to undermine the social arrangements and counter them [20]. Working from an anti-oppressive standpoint may help to increase the likelihood that another culture will be more open and accepting of changes, ideas, and the general presence of a “foreign” group like, for example, the CF. Paying particular close

attention to the way concepts are framed, discussed, and understood will shape how people act and react to them, influence how they think and behave and identify what actions they believe will be possible for them to take.

Current Canadian PSYOPS doctrine uses Maslow's [21] hierarchy of needs as a base level for many campaigns. However, from a cultural perspective, Maslow's hierarchy ignores the reality that many people's lives are oppressed and it does not acknowledge the ordering of need on the psycho-physical terrain, therefore the impact of social attributes, such as gender and race are not considered. It is therefore questionable whether we can assume that the universality of Maslow's hierarchy applies in all cultures [20]

Although Adams, Brown and Tario (2007) give a short review of the cultural considerations in the current consumer psychology literature, they also acknowledge that this is an area that needs to be further explored for applications to PSYOPS.

Helmus, Paul, Glenn and McKernan (2007) investigated potential uses of marketing for tools to help influence the attitudes and behaviour of indigenous populations during United States (US) military operations. The report acknowledged the positive and negative impact that US forces can have on the indigenous population, in addition to the impact that indigenous populations can have on the stability of US operations, by either supporting the friendly forces or the adversary. If a country's population holds a negative attitude towards the Western world, this decreases the chance of acceptance or support for US operations or policies. Helmus et al. note that there are key similarities between the military and commercial marketing worlds. Both seek to influence and change their target audience. The military's goal is to gain popular support and compliance from the target audience and to deny support to the adversaries. Importantly, it attempts to do this by means that do not force compliance by the target audience. By contrast, the adversary's list of ways to influence the target audience tends to include more aggressive and subversive techniques, including: intimidating and coercing non-combatants and journalists, controlling journalists' access to information, forging "special" relationships with media, engaging in disinformation, providing basic services, supporting youth and childhood education, and making cultural, religious or national appeals. In addition to violent techniques used by the adversary, it also uses the media to influence its target audience. The adversary uses various media formats to aid in these types of influential activities such as internet, adversary owned television stations, pulpits, fatwas, CDs and DVDs, work of mouth, flyers and outdoor media. Clearly, such aggressive and subversive techniques that work in opposition to an allied influence campaign can provide a barrier to its effectiveness. Here again, marketers are accustomed to running campaigns designed to undermine those of competitors. Intuitively, it seems reasonable to assume that, again, there are lessons that can be learned from marketing for developing countermeasures for adversarial campaigns.

Consumer Neuroscience

Neuroeconomics, consumer neuroscience, and neuromarketing are new research areas that use neuroscientific methods such as Functional Magnetic Resonance Imaging (fMRI) and Event Related Potentials (ERP) to analyze and understand the neuro-physiological elements of consumer behaviour [27, 29]. Major companies, such as Microsoft, Google, Frito-Lay and Daimler are exploring this technology for marketing purposes [31]. As an example, Huber (2010) reported an fMRI study showing that the decisions linked to a person's favourite brand show neural deactivation in areas that are associated with analytic processes and increased activation in areas that are linked to emotions involved in the decision-making process. The goal of this research is to gain an understanding of the relative contributions of reasoning, decision making, object representation, emotion and memory to decision making and choice in a marketing context [30].

Some neuroscientists considering neuromarketing to be an "abuse" of scientific methodologies [32], and ethical concerns and questions are being raised surrounding the possible uses or misuse of this information such as subject vulnerability, manipulating behaviour of consumers, brainwashing, and companies using this knowledge to manipulate the brain to sell consumers products they do not need [29, 31]. Marketing research companies are using neuroimaging technology during screening of persuasion attempts and this helps them to understand which stimuli trigger emotions such as excitement, trust, pleasure [30], and this raises concerns about this type of research limiting free will, and marketing companies using persuasion tactics without true consent [30].

Consumer neuroscience is still a relatively new area of research and there are many criticisms, unanswered questions and limitations in the area [27]. Many neuroscientists are sceptical about the development of neuromarketing as a viable subdiscipline [30] because there is still much that science cannot explain in this area. Current research is also suggesting that we need to be careful in the assumptions that are made from this research because the sample sizes are often small due to the high costs of the fMRI [30, 32]. However as the research continues, the possibilities are promising [27].

Future Research and Considerations

Many aspects concerning marketing, advertising, business and influence were discussed in this review. One important note is that with the constant change in technology and media it will be necessary to keep aware and exploit new opportunities to ensure that we are taking advantage of all available avenues. Failure to do so threatens to weaken the relevance and impact of our messaging.

More research is suggested investigating the effects of propaganda and political campaigns and how they positively and negatively influence the public and how to counter this. Another suggestion is to look at Western and international political campaigns in addition to major marketing campaigns and how they deal with negative press. This also applies to WOM and how to counter negative WOM. The CF may benefit from a stronger reliance on marketing tools and techniques to deliver counter propaganda.

The development of a graduate level diploma tailored to address the knowledge gaps for officers working at the strategic and tactical levels is required. This could be offered through the Canadian Defence Academy or perhaps the Royal Military College of Canada and Defence Research and Development Canada as a joint venture through the Defence and Security Research Institute in Kingston.

This review touches upon many aspects of marketing that have relevance to CF influence operations. In the sections above, we have outlined several points from literature that can be used to help guide the planning, organization and messaging of an influence campaign. Much of the information can be used to provide tips for a successful campaign or provide the basis for checklists that could be employed to help ensure some uniformity, quality and consistency across campaigns. A list of relevant marketing tips is provided in **Annex A** of this report. An initial attempt to distil the important points from the literature into a checklist to help provide guidance during campaign planning is provided in **Annex B**.

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Annex A Marketing tips from McMath & Forbes (1998) to consider and apply to Influence campaigns.

A powerful brand name (e.g. Canadian Forces) can potentially get in the way of the message you want to convey.

Make use of red teaming efforts during creation of the design of the campaign to challenge and avoid group think and result in fewer mistakes

No amount of advertising can make up for an inferior message or ‘brand’

Focus a message on the *benefits* of your product, service etc.

Be wary of straying or extending from the familiarity of your service, brand, etc. as people are suspicious of change

Define your image. Obey your image. Image in the marketing world is everything

No market equals no product

It is estimated that it costs 4-6 times more to convert a consumer than retain one. Never forget that your most valuable asset is loyalty of your existing consumers (friends, supporters)

You *must* have a better product or must be able to make consumers believe that you have a better product than the market leader

Your target audience are real people, individuals with whom you want to form a common bond. You have to develop a product or service that responds to their real needs

Annex B Thirty-two questions for discussion during campaign planning

The Basic Questions

1. Product :
 - a. What is the product or idea that we wish to promote to our Target Audience (TA)? For example:
 - i. A change in the TA's attitude toward the CF and/allied forces?
 - ii. A shift in the TA's loyalty away from the adversary?
 - iii. A different perspective on deeply ingrained biases or ideas held by the TA?
 - iv. Feelings of safety or security and well-being among members of the TA?
 - b. Will the product come in the form of a **message** we wish to broadcast to our TA? OR will we provide a **good** or **service** to our TA that will accomplish our goal in a more indirect fashion? For example, do we broadcast positive messages about us to the TA? OR Do create a positive impression by providing the TA with a good or service that they need?
 - c. **Blue Oceans.** Can we provide messaging/goods/services that make the messaging/goods/services provided by the adversary irrelevant? For example, Netflix made Blockbuster irrelevant. The iPhone made the blackberry almost irrelevant. The Nintendo Wii changed how we look at video game playing. How can we do something like this in our area of operations?
2. Price: What will TA members need to give up in order to adopt what we are promoting? Can we decrease the cost to our TA?
3. Place: What will we do to ensure that what we provide to our TA will be widely available to them?
4. Promotion: What will be the means by which we will broadcast our message? Flyer? Radio?
5. People: Who are the best choices to be the ones to interact with the TA?
6. Process: What processes need to be in place to provide and maintain what we will deliver as a service to the TA?

7. Physical Evidence: How will information about the quality of what we provide be passed among TA members?
8. Personalization: What are special steps we can take to tailor our deliverable for the TA?
9. Participation: Can we find TA members who would be willing to help us develop our product?
10. Peer-to-peer: Can we exploit social media to promote our deliverable?
11. Predictive Modelling: Are there any computational tools that we can use to help predict how fast and well our message will spread within the TA?

Focusing a campaign on the Target Audience

12. Solution: Is what we want to deliver appropriate to the TA's needs and issues?
13. Information: What information does the TA have to have in order to make an informed decision?
14. Value: Will the TA have a clear notion of the value and benefit of our deliverable relative to its cost?
15. Access: Does the TA have the logistical ability to use what we will provide?

What environmental factors do we need to consider?

16. What is the *Microenvironment*? That is:
 - a. Who is the competition?
 - b. What messages are they selling?
 - c. What are the other organizations we need in order to be successful in our campaign?
17. What is the *Macroenvironment*? That is, what natural, demographic, economic (e.g., spending power), technological, political and cultural values (perceptions, preferences, behaviours and core and secondary beliefs) forces that have an impact on the Microenvironment?

Marketing Management

18. Are we competing with other organizations who are also trying to sell a message? If so, are we going to be:
 - a. *Market challengers*: that directly compete with, and aggressively attack the messages or products of other organizations in order to get a majority share of the market OR
 - b. *Market followers* follow their competitors' strategies (e.g., by providing similar benefits, incentives, or marketing programs) with the goal of obtaining a stable share of the market.

Marketing Communications Mix

19. What is the most appropriate general means by which we should interface with TA?
- a. *Advertising?* Paid types of non-personal presentation and promotion of ideas, goods and services
 - b. *Promotions?* Short-term incentives that try to encourage consumers to purchase a product or service (e.g., offering televisions to those who turn in firearms kept in the house)
 - c. *Public relations?* Building positive relationships and positive publicity regarding a company's corporate image. This also involves the handling of unfavourable rumours, stories and events like, for example, the recent Listeriosis outbreak at Maple Leaf Foods.
 - d. *Personal "selling"?* refers to direct contact of the organization's team with TA members individually with sights on forming a long-term relationship
 - e. *Direct "marketing"?* Direct communication with specifically targeted individuals by means of telephone, mail, fax, or email with the intention of receiving immediate response and building long term customer relationships

Effective Communication

20. Who is my target audience? What needs or characteristics do the members share? Use Maslow's hierarchy of needs to help identify a need that could be fulfilled as part of an influence operation.
21. Is our messaging going to be aimed at the group whose behaviour we wish to shape? **OR** do we aim it at a segment that is in a position to change the group's behaviour. For example, if we wanted to get teenage males in a cultural group to surrender firearms hidden in their homes, do we aim our messaging at teenage males, or their mothers who, in that culture, might have a large influence on teenage male behaviour?
22. What should we select to be our target audience's motivation to change its behaviour? Do we appeal to something primitive like their need for food or sex? **OR** appeal to something more high-level like their sense of patriotism or sense of morality?
23. What kind of culture are we going to be working in?

- a. An Individualistic OR Collectivistic one?
 - b. One where authority is respected OR are people willing to challenge authority?
 - c. A masculine one that values competition, ambition, career advancement, achievement, assertiveness, heroism, and material possessions OR a Feminine one that values caring, nurturing and sympathy?
 - d. A Long-term society that values practical matters, future focused outlook, longer-term outcomes and slow changes OR a Short-term society that focuses on the past and present and are more readily open to changes?
 - e. A society that feels threatened by uncertainty and adheres to rules, regulations and religion. Societies high in uncertainty avoidance can be less likely to take risks and accept uncertainty and therefore may be more suspicious of the introduction of new ideas. Such societies also tend to communicate more with one another and therefore the consequences of negative WOM are potentially significant. OR is it a society that is low in uncertainty avoidance tend to accept risk more readily?
24. What is the desired response from my TA? That is, what behaviour or belief do we wish to shape?
25. How do I make sure that the TA is at the right state of “buyer” readiness?
- a. How do I make them aware of and understand the desired behaviour or belief?
 - b. How do I make them regard the desired behaviour or belief positively?
 - c. How do I make them prefer it over competing behaviours or beliefs? How do I inspire them to make a commitment to adopt the desired behaviour or belief? What kind of appeal should I use?
 - i. Rational (that appeal to consumers’ practical self-interests)
 - ii. Emotional (intention is for a positive or negative reaction such as love, joy, humour, guilt, fear, shame etc.) and
 - iii. Moral (appeals to a consumer’s sense of right and wrong, support for causes, environment, human rights, safety, etc.).

26. How should we structure our message? Do we:
- a. Allow the TA members to come to the conclusion themselves that they should adopt our perspective or change their behaviour?
 - b. Present a *one-sided* or *two-sided* argument for adopting our perspective or changing their behaviour
 - c. Present strongest arguments first or last in a list of arguments?
27. What is the format of the message? Format will depend on the Marketing Communication.
- a. What are the media, colours, illustrations, headlines etc that we should use for any materials we distribute?
 - b. For personal communication, who are the people we should form a relationship with in order that our message is propagated through the TA via processes akin to Buzz Marketing?
28. Who or what will be our message source? The source must be credible within the TA.
29. How will we measure effectiveness? Direct observation? Interviews? Opinion mining software tools?
30. Who organisation(s) can we partner with to lighten our workload?

Avoiding Mistakes

31. Is there anything in our messaging that can be misinterpreted because of translation or wording issues?
32. Are we sure that we are appealing to real needs, motives or desires of the TA? (For example, the CF would likely not commission the digging of a well in a village as part of an influence campaign if the village had potable water delivered to it regularly. On the other hand, if the delivery of potable water was carried out by the adversary, the well may be an effective way to make the village's relationship with the adversary obsolete)

List of symbols/abbreviations/acronyms/initialisms

CF	Canadian Forces
DND	Department of National Defence
DRDC	Defence Research & Development Canada
DRDKIM	Director Research and Development Knowledge and Information Management
MOE	Measures of Effectiveness
R&D	Research & Development
TA	Target Audience
PSYOPS	Psychological Operations
SIVA	Solution, Information, Value, and Access
WOM	Word of mouth
CEO	Chief Executive Officer
fMRI	Functional magnetic resonance imaging
ERP	Event-related Potential
US	United States
IP	Intellectual Property

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The purpose of this literature review was to acquire additional knowledge that would complement the previous work completed by HumanSystems Incorporated, Guelph, Ontario - in particular literature reviews on Influence Operations (CR-2007-146), Consumer Psychology (CR 2008-218) and an Annex to CF PSYOPS Materials, Information Management, Guidelines and Recommendations (CR 2008-215). Defence Research and Development Canada - Toronto has been conducting a larger research project whereby the goal is to contribute to the Canadian Forces' (CF) ability to plan, implement and evaluate influence campaigns for future expeditionary operations. Success in the business world, as measured by profitability and longevity, is a result of its ability to quickly adapt to changing demands from consumers and evolving tactics by competitors. Therefore, the business world is a potentially valuable and underutilized context in which to study tactics for marketing, advertising, public relations, media, and exploitation of consumer psychology, all or some of which could potentially be applied to current CF influence operations. This paper presents an exploration of how some of these business tools and philosophies could be applied to military influence operations (e.g., PSYOPs) to help give the CF an edge in today's asymmetric campaigns. Future research considerations and directions, in light of the lessons learned from the marketing world, are also discussed.

Le présent examen de la littérature vise à obtenir plus de connaissances, lesquelles complèteraient les travaux précédemment exécutés par HumanSystems Incorporé, à Guelph, en Ontario – en particulier les examens de la littérature sur les opérations d'influence (CR-2007-146), la psychologie du consommateur (CR 2008-218) et une annexe au matériel, à la gestion de l'information, aux directives et aux recommandations des OPS PSY des FC (CR 2008-215). Recherche et développement pour la défense Canada — Toronto dirige un projet de recherche de plus grande envergure qui vise à contribuer à la capacité des Forces canadiennes (FC) à planifier, à mettre en œuvre et à évaluer les campagnes d'influence en prévision des futures opérations expéditionnaires. Le taux de réussite dans le milieu des affaires, évalué selon la rentabilité et la longévité, découle de la capacité à s'adapter rapidement aux demandes changeantes des consommateurs et à l'évolution de la tactique des concurrents. Par conséquent, le milieu des affaires constitue un contexte sous-utilisé qui pourrait s'avérer utile pour l'étude des stratégies de marketing, de publicité, de relations publiques, des médias et de l'exploitation de la psychologie du consommateur, dont certains ou la totalité pourraient être applicables aux opérations d'influence actuelles des FC. Cet article se veut une exploration de la façon dont certains de ces outils et certaines de ces philosophies pourraient servir dans le cadre d'opérations militaires d'influence (p. ex. OPS PSY) afin d'avantager les FC dans les campagnes asymétriques d'aujourd'hui. À la lumière des connaissances tirées du milieu des affaires, d'autres possibilités et axes de recherche font également l'objet d'une discussion.

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Marketing; consumer; influence operations; psychological operations

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