

Effectively Engaging People

Views from the World Social Marketing Conference 2008

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Introduction

The 2008 World Social Marketing Conference showcased a fantastic range of expertise and innovation. Along with our partners, the Chinese University of Hong Kong and the University of Lethbridge, we at the NSM Centre are proud to have brought together so many delegates from around the world, and are grateful for the tremendous contribution they all made.

The conference was enriched by the insights and experience of a diverse range of speakers, and I am delighted to present interviews with many of the keynote speakers here.

I hope you are inspired and informed by the wealth of social marketing know-how found in these pages.



Professor Jeff French
Director, National Social Marketing Centre



How did you become involved in social marketing?

In the early 1970s I realised that marketing concepts and tools could be applied to areas beyond goods and services. They could be applied to market any organisation, person, place, cause or idea. My colleague Gerald Zaltman and I wrote an article called 'Social Marketing: An Approach to Planned Social Change'. We chose the name 'social marketing' to show that not all marketing is commercial. Marketers could address public concerns and contribute to their resolution. Subsequently, I published the first book on social marketing with Ned Roberto. Some years later, Nancy Lee, Ned Roberto and I published a much updated version with new theory and case examples. The book is now in its third edition.

What is social marketing?

Social marketing is the application of marketing concepts and tools to influence the behaviour change of a target audience, in ways that create net benefits for the individual, community, and society at large. Typically, social marketing centres on such problem areas as health, environmental protection, better education, family planning and others.

What advice would you give to someone developing their first social marketing intervention?

Frame the problem carefully and be realistic in the results that you are seeking. Conduct the intervention with clear performance measurements so that cause and effect can be easily identified, and the impact can be measured in financial terms or other metrics.

What needs to be done to build the workforce in social marketing?

We need to educate business managers, non-profit managers and politicians in the meaning of social marketing and the major steps and processes it uses. We must avoid confusing it with social advertising or corporate social responsibility. We have formulated a distinct set of ten steps which has received high agreement on how to develop a social marketing plan. If we can educate social marketing users in social marketing methodology, the interventions are likely to be successful.

What book would you recommend to people to help them understand social marketing?

In addition to our third edition of *Social Marketing* (Sage, 2008), I would recommend Alan Andreasen's book, *Social Marketing in the 21st Century*.

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Philip Kotler



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If you were trapped in a lift for ten minutes with your nation's President, what would you say?

We are at that stage in time, Mr President, where we are beginning to have a methodology which is cost effective and could help us resolve many of the social problems that have plagued society. That tool is social marketing.

“A methodology which...could help us resolve many of the social problems”

What got you involved in social marketing?

In my earlier commercial marketing career, I liked the hammer called 'marketing' but I was unhappy promoting healthy hair...until I found social marketing, where I was both passionate and satisfied. So I guess it was my desire to use what I like (marketing) to do something good (positive social change) that got me involved in social marketing.

What is social marketing?

Social marketing is a framework that allows us to offer benefits that attract our audience and supersede barriers from the audience perspective.

What one thing have you learnt that you wish you knew 20 years ago?

The importance of product management in social marketing.

What example would you give to highlight social marketing's potential?

Grameen Bank by Mohammed Yunus. Although Dr. Yunus does not label his work as social marketing, his work exemplifies many of the features that we social marketers use.

What one piece of advice would you give to someone developing a social marketing initiative?

Total commitment to audience orientation. This would force managers to carry out research at every stage and produce strategies that remain consistent with audience needs (not what they say, but what they desire or what moves them).

What are the most challenging aspects of creating a social marketing intervention?

The lack of understanding of its core concepts among social change managers.

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“I liked the hammer called ‘marketing’ but I was unhappy promoting healthy hair”



How did you become involved in social marketing?

After a management degree, and a few years marketing industrial projects began to make me feel uneasy, I wanted to do something more meaningful. With an unmanageable population, widespread poverty, high maternal mortality and millions of unwanted children in my country, family planning was close to my heart. A lack of professional management in development projects was evident. Opportunity came my way when I was selected 28 years back, by a non-profit organisation in its infancy, to design and develop its family planning programme. It gave me an immense opportunity to apply my management skills and knowledge for 'social dividends' instead of just profits. I was not aware then that I was using the social marketing route.

What is social marketing?

In social marketing, the commitment to the mission and cause is paramount, rather than profits as in commercial marketing. The person willing to practice social marketing must be committed to the specific cause of the socio-economic condition of the target population, along with their real needs.

What advice would you give to someone developing their first social marketing intervention?

The cost-effectiveness of different approaches must be carefully analysed at the designing stage itself and a strong monitoring system set up at the planning stage. This will help to enhance the effectiveness of the project, making it possible for it to sustain itself beyond funding. Its services will continue to be delivered to people, instead of abandoning them at a critical juncture when attitudinal change has begun to take place and they are ready to practice a different behaviour.

Which book would you recommend to people to help them understand social marketing?

All books on social marketing are relevant. Personally, I have been greatly influenced by the writings of Professor Philip Kotler.

What are the most challenging parts of developing a social marketing intervention?

Keeping it focused on meeting the objectives of the programme, without getting lost on the packaging of it, to meet the requirements of different donors and governments.

What should those with very few resources do to create an effective social marketing intervention?

Keep it small and simple. Do whatever is possible, but be result-oriented. This will give you immense personal satisfaction. Your commitment and a successful model will eventually lead to its expansion.

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What one thing have you learnt that you wish you knew 20 years ago?

An organisation with a long-term development mission must not be donor-driven.

Where will social marketing will be in 20 years time?

My assessment is that the gap between 'haves' and 'have nots' will further widen. To improve the quality of lives of people, social marketing approaches should assume more importance. However, the fillip given to social marketing would depend on the policy environment of governments and donors as well as advocacy by institutions committed to social marketing.

“An organisation with a long-term development mission must not be donor driven.”

How did you become involved in social marketing?

I read Philip Kotler's book, *Marketing Management* in graduate school that proclaimed that marketing can contribute to the quality of life - that it can be used to influence public behaviours that will contribute to alleviating social issues. While marketing director of our region's children's hospital, we developed a campaign to increase use of life vests among children and I fell in love with marketing behaviours and decided that's what I wanted to do the rest of my life.

What is social marketing?

Social marketing is a distinct marketing discipline, one that has been labelled as such since the early '70s. It is focused on influencing behaviours for good – ones that will improve health, prevent injuries, protect the environment, and contribute to communities. Fundamental principles at the core of this practice have been used to help reduce tobacco use; decrease infant mortality; stop the spread of HIV/AIDS; make wearing bike helmets a social norm; decrease littering; increase recycling; and persuade pet owners to licence their pets and 'scoop their poop'.

What advice would you give to someone developing their first social marketing intervention?

Focus on a single, simple, doable behaviour and understand what barriers your target audience has to adopting it.

How can we build capacity in social marketing?

Make it a required or core course for degrees in public health, social work, public administration, political science, environmental studies - maybe even medical school.

Social marketing increasingly encompasses people from both marketing and the social sciences. What are the challenges in integrating learning from different disciplines?

The challenge is that those without a marketing background are often not comfortable or familiar with the other three crucial tools in the marketing mix: product, price and place. My experience has been that many come with a bias against corporate/commercial marketing, primarily because they are equating marketing with sales and advertising, which they find annoying at best.

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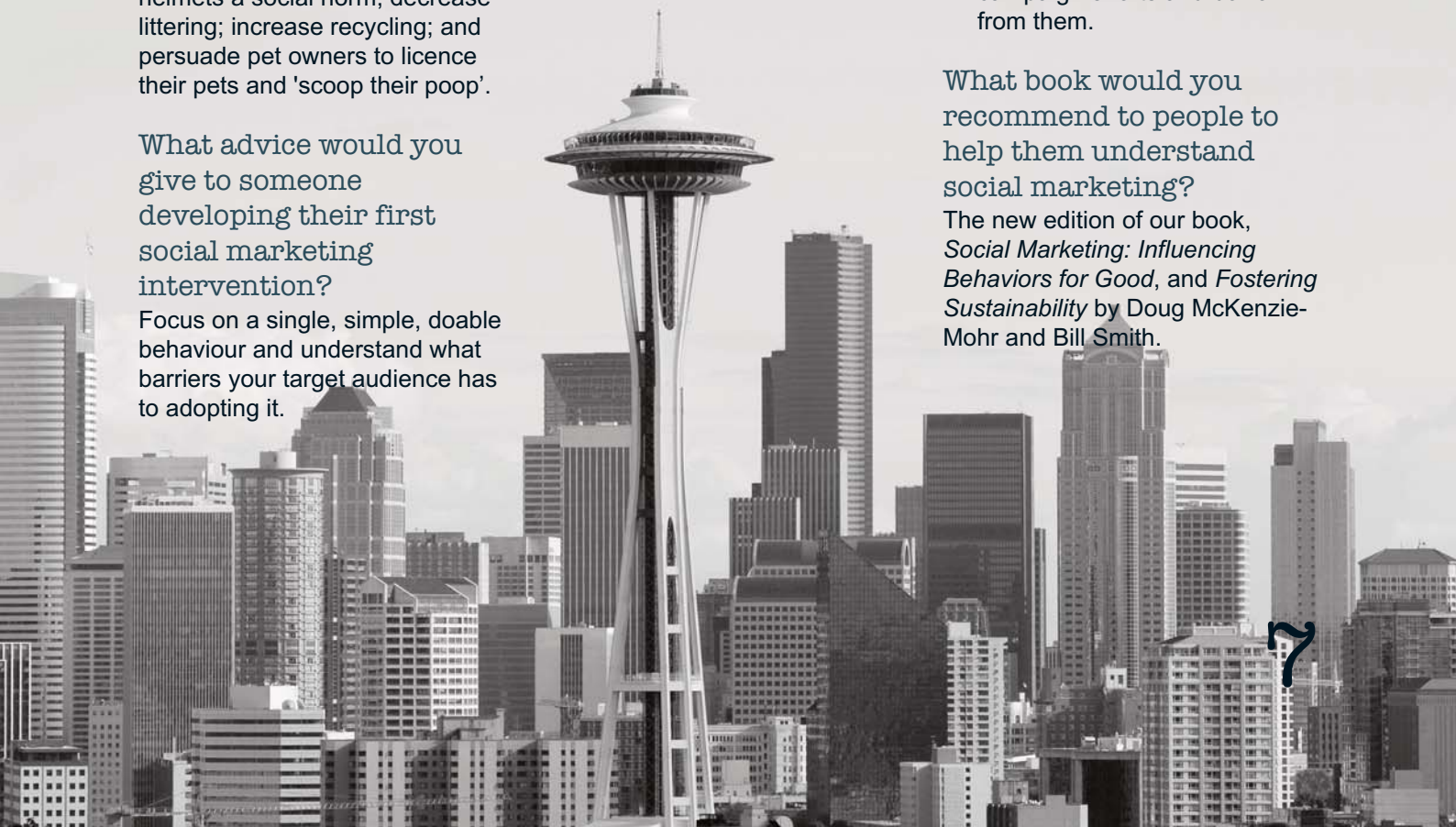
www.socialmarketingservice.com

What advice would you give to an organisation with limited funds to invest in a social marketing intervention?

- Do a pilot;
- look for partners who do have funding and have something in it for them to support the effort;
- use social media channels; and
- don't spend the money on creative development. Look for existing and prior similar campaign efforts and borrow from them.

What book would you recommend to people to help them understand social marketing?

The new edition of our book, *Social Marketing: Influencing Behaviors for Good*, and *Fostering Sustainability* by Doug McKenzie-Mohr and Bill Smith.



How did you become involved in social marketing?

In 1994, the Futures Group International was looking for a Resident Advisor and Coordinator for their SOMARC (Social Marketing for Change) Project in Senegal, a USAID-funded project. I was recruited, and that is when I officially started my involvement in social marketing. But my initial interest in social marketing grew from when I first started my career as a pharmacist, long before 1994.

What advice would you give to someone developing their first social marketing intervention?

I would recommend making sure they focus on the real priorities and well-defined issues prior to implementation. Social marketing is a powerful tool for behaviour change but in some areas, where the external environment is not favourable, you face so many challenges. Achieving results in these circumstances at the target group level takes much longer.

What are the most challenging parts of developing a social marketing intervention?

The external environment can be one of the most challenging factors. Specifically, when key stakeholders who set strategies and policies for the country are not convinced of the need for investing in social marketing, but would rather purchase equipment, buildings, and so on. Such things may not always be the most urgent priorities when you look holistically at the situation, but are often the most visible.

What should those with very few resources do to create an effective social marketing intervention?

We have to work with all the resources at our disposal, which requires understanding the external environment so that we don't overlook those that already exist. Most often we have found that populations will contribute more in the area of health - as is seen with the Bamako Initiatives in African countries. Through the Health Committees set up at the department, region, or district levels, it is the community that even recruits their doctors and nurses and purchase equipments.

If I had £10m to invest, tell me why it should go to social marketing rather than reducing a budget deficit or to other tools?

Social marketing will help identify causes, barriers and solutions on its own. Reducing a financial deficit will not necessarily avoid a new deficit in the future. Social marketing is a more global approach, integrating development of tools and methods to avoid future deficits.

If we are to develop social marketing what are the key challenges now?

It has to be more accepted as a discipline in and of itself, and be taught at university and professional teaching schools, in health, business administration, agriculture, environment and so on. Organisations and institutions in the domain will have to contribute to the development of documented knowledge and materials for such teaching to take place, and probably develop trainers' tools and case studies that integrate the local needs.

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What book would you recommend to people to help them understand social marketing?

I discovered Professor Alan R. Andreasen's book *Marketing Social Change: Changing Behavior to Promote Health, Social Development, and the Environment* in 1997 while at Georgetown University School of Business. I think this book clarified for me what social marketing really is.

Where will social marketing be in 20 years?

More and more, it will be known as a successful approach to resolving many problems we encounter (health coverage, accessibility of services and products, environmental issues, and so on). I feel social issues are often barriers to market development. Improvement to the quality of life in general is a universal need throughout the world.

How did you become involved in social marketing?

As someone practicing health promotion, social marketing is the buzzword which I hear often and am interested to find out how it may be applied in day-to-day work.

What one thing have you learnt that you wish you knew 20 years ago?

The total process planning model and customer triangle of social marketing.

What advice would you give to someone developing their first social marketing intervention?

Follow the total planning model and take heed of the messages in the customer triangle as far as you can.

If we are to further develop social marketing what are the key challenges now?

Make social marketing principles and practice a core part of any health promotion.

If I had £10m to invest, tell me why it should go to social marketing rather than reducing a budget deficit or to other tools?

Wise investment in social marketing may maximise the cost-effectiveness of your undertaking, creating value for money, hence securing if not drawing in more resources to sustain your work.

What book would you recommend to people to help them understand social marketing?

Resources uploaded to the National Social Marketing Centre website are very readable and practical for beginners in social marketing. Practitioners need a grasp on the knowledge base that works, rather than knowledge base that may work.

What do you consider the most challenging parts of developing a social marketing intervention?

Having to embark on something new without too much local guidance.

What should those with very few resources do to create an effective social marketing intervention?

Most important is a change in mindset to really serve your client or audience better or more effectively. Practical tools developed by leading organisations can help to build local capacity.

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Where do you feel social marketing will be in 20 years time?

More real life examples and illustrations of how social marketing may contribute to the promotion of healthy practices and public goods. Perhaps much wider acceptance and adoption in the public sector as well.



How did you get involved in social marketing?

When I was working in behavioural science and health communications at CDC, in the mid-90s, I heard about this 'new' tool. To me, it made complete sense to use commercial marketing techniques: just writing prescriptions for health wasn't enough, we needed to think about what moves and motivates people. I was impressed by the depth of thinking within social marketing in this regard.

What is social marketing?

I describe social marketing to others as a process or tool to achieve positive behaviour change. I personally think of it in terms of health, but there are many other areas it can be applied to. It is informed by multiple theories of human behaviour and, at its best, by evidence for how people really think and act.

What one thing have you learnt that you wish you knew 20 years ago?

I wish I'd started to help 'market' social marketing earlier. Funders and policy makers often think they can achieve their goals in one budget cycle and move on, but supporting positive change through social marketing is a long-term investment. It would be easier to get this message across if they had bought into the idea early on.

If you had to choose a single example of social marketing to highlight its potential, what would it be?

CDC's 'Learn the signs. Act early' campaign (www.cdc.gov/ncbddd/autism/actearly). The aim was to raise

awareness of and encourage screening of young children for developmental problems such as autism. Previous health communication measures had actually made some parents less likely to act, but the careful application of the four Ps of marketing (Product, Price, Place and Promotion) moved us to acknowledge the magnitude of the price a parent pays in looking for a problem with their child's growth. And while there may still be hidden prices, it dug deep enough to enable us to address them methodically. I am hopeful that we will start to see positive results – that disorders are being diagnosed earlier – within the next few years.

What one piece of advice would you give to someone developing a social marketing initiative?

Bring as many people from all disciplines to the table as you can, as early on as possible, and find out how they would define 'success' in the initiative. We too often don't think beyond our own conceptions of a project's success, but thinking about what it looks like from the perspective of people who are not directly involved in a project is key to moving it forward.

What are the most challenging aspects of creating a social marketing intervention?

Competition! Proper funding can help break through it, but does not necessitate success alone. Today, we are exposed to an overwhelming volume of messages and products: if you want me to do or buy one thing, I'm not going to do some other things. Our lives are incredibly complex, and we need to work out how to deal with this.

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Also, the term 'social marketing' is confusing, which makes it hard to market. At CDC and in other public health specialties, people confused it with social engineering, which is why we now use the term 'health marketing' instead. More work needs to be done on the brand!

What are you most proud to have achieved in social marketing?

That I have contributed in some small way to social marketing becoming accepted, through organisations like the National Center for Health Marketing at CDC and NSMC, and in increasing professional degrees and qualifications. Also, social marketing is successful only when it is based on people, on their needs and feelings. You can always be proud when you put people first.

How did you become involved in social marketing?

I came into this area with a PhD in clinical psychology and post-doctoral work in behavioural medicine. My first position was with the Pawtucket Heart Health Programme. This was a National Institutes of Health-funded heart disease prevention programme in Rhode Island that brought together the worlds of public health and behavioral health. This very quickly led to me exploring the world of marketing for population behavioural change. From there, it was tripping over the early social marketing writings, and thinking that it sounded similar to what I was trying to do. I started talking about social marketing with June Flora at Stanford, who was already using social marketing principles in the Five-City Project. We worked together, doing some thinking and exploring and experimenting with different ways of using marketing principles in community based heart disease prevention programmes.

What is social marketing?

Using the techniques of marketing to improve people's health and social conditions. And by that I would also say that the everyday examples of marketing (such as product innovations; pricing and distribution strategies; and advertising and promotions), that help and encourage people to buy various products and services, are the same types of techniques we can use to encourage people to adopt healthy and environmentally-friendly behaviours.

What advice would you give to someone developing their first social marketing intervention?

Listen to the audience. Don't assume you know what is best for solving or addressing a problem – listen to and talk with a lot of people.

How can we promote social marketing to relevant practitioners and key decision-makers?

This is not so much an empirical or evidence-based question of highlighting to them what studies have shown social marketing to be effective at doing, although that is important. For practitioners and decision makers, it's about being able to tell them stories about how social marketing was adopted in a programme in significant and very basic ways and the improvements in reach, service and benefits that resulted. It's that kind of narrative of before and after, helping people see and understand how social marketing approaches apply to and change practice and policy development.

What needs to be done to build the workforce in social marketing?

It's open to everybody. Right now a short history of social marketing would show it has lived and thrived with the links to public health – and there is much that needs to be done to bring it into public health as a discipline, not just a practice. One of the frustrations I have is that it doesn't earn much value in academia. We need to give it more value as an academic discipline in both marketing and public health. I want to see incentives to

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encourage more people to enter and pursue an academic career in social marketing within the public health and marketing fields.

What book would you recommend to people to help them understand social marketing?

Text books are all probably equally as good – they all have their own strengths. I like *Truth, Lies and Advertising* by Jon Steele. It is good at developing the audience insight and translating that into practice, which I think is the essence of good social marketing. If you don't understand the core value of listening, use what you learn to generate the insight and then translate this into practice, the other marketing skills will do you very little good. This is missing from most work I review.

How did you become involved in social marketing?

I wrote a book, *Fostering Sustainable Behavior*, in the early 90s, that merged knowledge from social marketing with knowledge from psychology.

What is social marketing?

From my perspective, social marketing involves five steps:

- selecting behaviours;
- uncovering the barriers and benefits to the selected behaviours;
- developing strategies that address these barriers and benefits;
- piloting the strategy; and
- when the strategy is found to be cost-effective, implementing it broadly.

This process can be utilised to foster a wide range of behaviours.

What advice would you give to someone developing their first social marketing intervention?

Carefully select which behaviour(s) to target and conduct formative research regarding the barriers and benefits to these behaviours. If these first two steps of community-based social marketing are skipped, programmes have a low likelihood of success.

How can we build capacity in social marketing?

Demand that governmental behavioural change programmes must use social marketing approaches.

What needs to be done to build the workforce in social marketing?

Encourage governmental and non-governmental agencies to

hire social marketing staff and promote those who develop their social marketing skill base.

What are the key ethical issues in trying to influence people's behaviour?

The intended audiences of social marketing programmes need to be aware that efforts are being made to alter their behaviour.

What should we be doing to support the development of a robust shared evidence base?

Please see my website for an example of an attempt to do this with respect to environmental behavioural change. The new site, which is being rolled out in November, combines five resources (our book; over 1000 articles related to environmental behavioural change; case studies; discussion forums, which include a daily digest that reaches over 6000 practitioners; and an online journal, *Journal of Fostering Sustainable Behavior*). We need a similar effort on the broad set of behaviours addressed by social marketing.

What are the challenges faced by an organisation with limited funds to invest in a social marketing intervention?

The challenge of doing formative research with a small budget. We need to see state and federal efforts to provide barrier and benefit research to those who are unable to do this work themselves.

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What book would you recommend to people to help them understand social marketing?

Kotler and Lee's recent edition of *Social Marketing*.

What other question should we have asked you?

It is useful to consider the level of penetration that social marketing has reached within different domains. While social marketing is fairly broadly used - for example, to foster health related behavioural changes - it is rarely used to foster environment-related behavioural changes.



How did you become involved in social marketing?

I was lucky to find myself in the right place at the right time, repeatedly. First, when getting my PhD in communication research at Stanford in the mid-1980s, I got fabulously lucky in the fact that my advisor was June Flora – an extraordinary social marketer who cut her teeth on the Stanford Heart Disease Prevention Project. Next, while working as an assistant professor at Emory University in Atlanta, I learned that Bill Novelli – the father of social marketing – lived in Atlanta too. He ended up co-teaching my social marketing course with me the next semester (how's that for lucky?). His old firm – Porter Novelli – recruited me to join their social marketing team, which was a marvellous opportunity to transition from research to practice and learn a whole new set of skills. Truly, I'm a lucky guy.

What is social marketing?

Over time, I've become a bit of a purist on this point (possibly fanatically so), largely because so many people wrongly equate social marketing with information campaigns. Therefore, I describe social marketing as a process of creating, delivering and promoting products or services that elicit beneficial behaviours from members of a target audience. In other words, if there is no product or service, it isn't social marketing. [Is this] a fanatical perspective? Yes, but it helps people see that they have more tools at their disposal than they previously recognised.

What advice would you give to someone developing their first social marketing intervention?

Focus. Tackle one 'non-reducible' behaviour at a time. If you don't know what a non-reducible behaviour is, read Doug McKenzie-Mohr's forthcoming (2009) book.

How can we build capacity in social marketing?

Commercial marketers can make the transition, but they need training in the social content. Communication professionals can make the transition, but they need training in the Four Ps. We could all benefit from a large library of well-developed case studies.

What are the key ethical issues in trying to influence people's behaviour?

This question is 'above my pay grade', as they say here in Washington, DC, but I'll make one brief comment. We tend to focus too much on changing people, and we don't focus nearly enough on changing the environments in which people live, work and play. Behaviour is so deeply influenced by the attributes of our environment (products and services, policies, and physical attributes). Social marketing programmes will fully prove their worth when they demonstrate their ability to create environmental change.

How can we develop a robust shared evidence base in social marketing?

See my comment about case studies above. And let's import some Six Sigma experts from GE or Toyota or Wal-Mart to teach us how to build total quality improvement into everything we do.

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What are the challenges faced by an organisation with limited funds to invest in a social marketing intervention?

They face the same problems as an organisation with a large budget. The challenge isn't money, it's mindset. Focus on the customer, and use whatever resources you have to best effect.

What book would you recommend to people to help them understand social marketing?

My students are assigned to read Philip Kotler and Nancy Lee's (2008) book and Doug McKenzie-Mohr's (1999) book. Those books – especially in combination – are so good that I hardly feel the need to lecture.

What other question should we have asked you?

If you were awarded a sabbatical to take three months to become a better social marketer, how and where would you spend your time?

How did you become involved in social marketing?

By being asked by Professor Jeff French to work on the two-year independent review of social marketing, commissioned by the British Government in 2004; and having a background in public health, health promotion and communications.

What is social marketing?

At the highest level I'd probably just say it was about harnessing marketing approaches to benefit people's lives. However, increasingly I talk about it being the use of marketing, alongside other techniques and approaches, to establish and sustain positive behaviours that help improve people's lives. The critical word here is 'alongside' so that we help people approach social marketing as an integrative discipline, one that connects with and integrates alongside other methods and approaches. Otherwise we risk getting drawn into what I'd describe as the 'method wars', where instead of looking for the links between methods and approaches, we simply get caught into 'my method is better than yours', and set up artificial boundaries that pull people apart rather than bring them together.

Recognising that social marketing is understood (and misunderstood) in a range of ways, the NSM Centre developed the 8-point Benchmark Criteria for social marketing, building on previous work by Alan Andreasen. How useful do you find them?

As someone who developed the benchmarks I obviously see these as important, and am pleased to thank

Alan Andreasen for his original work in proposing his six-point version. It is worth saying that in developing them we have been really aware of the extent to which different people pick up on different language and ideas. Their value of them is less about the specific descriptions of each point, but rather that they each represent a set of ideas, concepts or principles that it is important to build a wide understanding of. We continue to work on ways to communicate these, tailoring them to different audience needs.

What are the key ethical issues in trying to influence behaviour?

For me, the two key ethical issues in social marketing are:

- How is the social good being defined?; and
- who is involved in the defining of it?

How can we get high level decision-makers to understand the potential benefits of a social marketing-informed approach?

The critical issue is to start with developing a sound understanding of where the decision-maker is coming from, what's important to them and what they value. Then, from this understanding, looking at ways to engage them, rather than selling the benefits of social marketing from one's own perspective. Quite often this can mean not starting from a social marketing framing at all.

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What book would you recommend to people to help them understand social marketing?

It's always difficult to recommend specific books, but Alan Andreasen's *Social Marketing in the 21st Century* is an excellent introduction and a relatively easy read for someone trying to get an overview of where social marketing thinking is now.

What one thing have you learnt that you wish you knew 20 years ago?

It's all about people and relationships: investing time in building connections with policymakers and practitioners as well as the community we aim to serve.

How did you become involved in social marketing?

Through my work in public health – I was looking for a pragmatic and non-traditional framework to encompass the many facets of issues with rigour, creativity and ethics.

What is social marketing?

Social marketing is about encouraging people to adopt ideas and/or behaviours for their personal benefit and for that of society in general. You will have a much better chance of influencing people to voluntarily adopt a behaviour if you:

- know more about them;
- understand that not all are likely to be at the same starting point;
- consider your competition;
- actually make it attractive and easy for people;
- partner with influential people;
- communicate effectively; and
- are in it for the long run.

What advice would you give to someone developing their first social marketing intervention?

Invest in formative research and audience analysis to see what people are thinking and doing.

How can we build capacity in social marketing?

- Through training and ongoing coaching for those interested in it.
- By providing regular summaries of insights on a variety of audiences and subjects, and highlighting possible implications for strategies.

What are the key ethical issues in trying to influence people's behaviour?

- The legitimacy of the social change agent and agenda;
- how the ends being pursued and priority audiences have been selected;
- raising anxiety unnecessarily with messages that use 'scare tactics';
- what is 'not' said; the use of resources; and
- unintended consequences.

What should we be doing to support the development of a robust shared evidence base?

Evaluate initiatives that have used social marketing as a framework (for a variety of issues in a variety of settings) and publish them in the most credible journals.

What are the challenges faced by an organisation with limited funds to invest in a social marketing intervention?

If they see social marketing as an isolated budget item or intervention, they face a significant challenge! If they see social marketing as a framework for planned change, they will see their whole budget as a social marketing budget.

What book would you recommend to people to help them understand social marketing?

Kotler, P. & Lee, N.R. (2008) *Social Marketing: Influencing Behaviors for Good*.

NAME

Francois Lagarde



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“Not all are likely to be at the same starting point”

How did you become involved in social marketing?

When I first began working at HSC, it had already adopted a social marketing mantra. I started working on discrete projects, and moved on to applying social marketing to nutrition. Since my background is in health and not marketing, I first had to get my head around what the concept actually meant!

What is social marketing?

At a high level, it is employing a marketing paradigm to achieve social change. We at the HSC also use the term *Nga Hapori Hokohoko*, which is the notion of mutual and reciprocal exchanges with people (such as sections of a tribe, *whanau* (family), society, and community).

What one piece of advice would you give to someone developing a social marketing initiative?

Try to develop partnerships with groups, individuals and organisations who know what they're talking about – although finding them is not always easy!

What are the most challenging aspects of developing a social marketing intervention?

First, clearly defining the problem and therefore related objectives for the intervention. Second,

determining the most appropriate and effective strategic mix for the allocated financial resources and available human capacity and capability. Third, investing enough time and effort into establishing and nurturing good relationships.

What should those with very few resources do to create an effective social marketing intervention?

Look for the people who can help you. There are lots of groups out there, such as community groups, local champions, and local organisations, with established networks, who may share common objectives and who are willing to collaborate. Also, try to find good examples of successful social marketing interventions with limited resources. Access to a database of robust social marketing interventions would be great.

What are the key challenges we face in further developing social marketing?

1. Establishing agreed standards or benchmarks of practice for the discipline. If we have a united view of practice that moves beyond relying on the force of individual practitioners, then we are more likely to bring others, especially decision makers, along with us.
2. Determining the right mix of individual and upstream marketing (including influencing the decision-makers) for particular social issues.
3. Breaking down the 'system' silos we tend to get caught up in. Often we are funded to address single issues or specific disease states. This can create competition within and across health and social disciplines, and may lead to a saturation of the market with all our messages, rather than promoting more collaborative efforts.
4. Establishing good information dissemination systems for the discipline, so that we can learn from each other and avoid duplication.
5. Demonstrating good short-term success measures as proxies for long term achievement.

NAME

Tane Cassidy

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How did you become involved in social marketing?

I was only vaguely familiar with social marketing before I attended my first national conference in Florida in 1995. Some staff in our Family Health Division trained through the Tufts-Emerson programme in Boston and conveyed an incredible enthusiasm for social marketing. The conference really turned me on, so I came back to RI intending to find ways to use social marketing to study and solve public health problems.

What is social marketing?

I would say that social marketing is a method for applying the tools of commercial marketing to social, environmental and public health problems. The objective is to promote health and social welfare in a population through behaviour change. Social marketing starts with the consumer and attempts to identify 'emotional hooks' that can link audiences with health-promoting behaviours.

What advice would you give to someone developing their first social marketing intervention?

I would remind them that social marketing is about behaviour change, not about knowledge and attitudes alone. Paying attention to behaviour change in a defined population using the systematic approach of social marketing is what makes the intervention effective.

What advice would you give to someone trying to make a business case for developing a social marketing strategy?

I would point out that whatever we are doing is clearly not working. If business can successfully use marketing to change the behaviours of target audiences to promote fast-food consumption and sedentary lifestyles, then we have to use the same approaches to changing those behaviours. I would also point out that social marketing is a useful approach to policy development – probably the only way we will be ultimately successful in changing these health behaviours.

What are the challenges faced by an organisation with limited funds to invest in a social marketing intervention?

Social marketing can be expensive, but we can learn from each other, apply lessons learned from similar projects in other areas and do other things to make what we have more effective. Partnering is a great way to increase the amount of resources available for an intervention.

What is the best way to create effective partnerships between the public and private sectors?

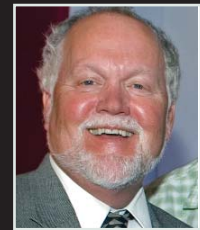
I find public/private partnerships both extremely rewarding and entirely frustrating. It just takes a lot of partnership management and maintenance to make them work out. Clear understanding of mutual obligations and responsibilities ('contract') as well as limits to the partnership ('deal breakers') are important.

NAME

Dr Robert Marshall

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What book would you recommend to people to help them understand social marketing?

I like the Kotler, Roberto and Lee book on social marketing. It is down to earth and has lots of examples.

What other question should we have asked?

What one thing would help most to solidify the field? I think social marketing needs to find a professional organisation base, either in its own organisation or as part of a larger existing one. Also I think it needs to be organised as a 'community of practice' so that it focuses on inclusion rather than exclusion of partners in different fields (other than public health).

Where can people find out more about your work?

I don't have a website or listing of social marketing-based projects or publications. However, that would be something at a professional association could provide to help support the field. I am happy to send information about projects to anyone interested.

How did you become involved in social marketing?

By switching from private sector to public sector marketing.

What is social marketing?

Social marketing is a systematic process that uses a range of marketing concepts and techniques to address short, medium and long-term issues with clearly identified and targeted behavioural goals, to achieve a particular social good.

What advice would you give to someone developing their first social marketing intervention?

Search for the customer insight.

How can we build capacity in social marketing?

By inspiring, motivating and training the talent to do it.

What are the key ethical issues in trying to influence people's behaviour?

Developing trust and desire to change through insight, rather than just translating policy to communications.

How can we support the development of a robust shared evidence base?

Finding a mechanism to achieve this digitally.

What are the challenges faced by an organisation with limited funds to invest in a social marketing intervention?

Brainpower rather than spending power.

What book would you recommend to people to help them understand social marketing?

Gerard Hastings, *Social Marketing: Why should the Devil have all the best tunes?*.

What other question should we have asked you?

What will social marketing look like in 2018?

NAME

Paul Brewer



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“Search for the customer insight”

How did you become involved in social marketing?

While working on the TravelSmart behaviour change programme in Perth, Western Australia. It is now internationally recognised for leading and developing the multi-modal (or behavioural) approach for the promotion of alternative modes of travel to the motor car.

What is social marketing?

Social marketing comes from the joining of two marketing disciplines: 'social', from social sciences and social policy, and 'marketing' from commercial and public sector marketing. The result is a comprehensive and methodical approach to voluntary behaviour change programmes designed to influence target audiences.

What advice would you give to someone developing their first social marketing intervention?

Scope, scope, scope – in my experience, professionals do not spend enough time fully scoping the project. In many cases there have been similar interventions that have worked very well, which are ignored in favour of developing new approaches. This can lead to costly duplication. While the location may be different and the audience may have specific local needs, an adapted approach using audience insight from other interventions can lead to successful behaviour change.

How can we build capacity in social marketing?

Developing real capacity in the field can only happen with a mentoring approach, rather than organisations simply undertaking and delivering the social marketing processes and interventions. The Department of Health (DH) has a model that I believe could be developed to improve capacity. Teams of specialists are employed nationally, who work intensively in health organisations for short periods in a facilitating and enabling role, rather than in implementation capacity. This approach, while more time-consuming, develops real capacity and skills at the local level.

What are the key ethical issues in trying to influence people's behaviour?

I have witnessed the confusion of large organisations who have wanted to deliver social advertising rather than true social marketing. While public sector bodies can use standard marketing approaches to improve the promotion of their relevant services and policies, this should not be confused with social marketing. We need to ensure that our new profession lives up to the core principles of voluntary behaviour change, not simply improved advertising or the delivery of policies that may or may not be desired by the public. If we do not, we risk losing the moral high ground, making social marketing a fad rather than a fashion.

What should we be doing to support the development of a robust shared evidence base?

We need an agreed national (standardised) approach to sharing information, and an accessible, searchable database with a wide range of good practice examples. At both DH and the NSM Centre, we encourage the use of the social marketing benchmark criteria to develop, evaluate and monitor interventions. The issue is how many of the benchmark criteria an intervention should include to be a true social marketing project.

What are the challenges faced by an organisation with limited funds to invest in a social marketing intervention?

It is not about the money available or the budget. Whether the project is £500 or several million pounds, you still need to follow the same methodical approach to scoping and developing the intervention. Some of the best social marketing ideas have been developed with small budgets and using volunteers.

NAME

Ewen MacGregor

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Senior Associate, National Social Marketing Centre



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What book would you recommend to people to help them understand social marketing?

I would recommend Doug McKenzie-Mohr's website, www.cbsm.com. It helped develop my understanding of the principles of social marketing. It has tools and detailed case studies, and offers a simple practical approach.

I have also attended Doug's advanced practitioner courses and highly recommend attending one if you get the chance.

For useful community-based social marketing tools, visit www.toolsofchange.com.

How did you become involved in social marketing?

I caught the bug in 1989 when I heard an international guru talk.

What is social marketing?

Being able to influence behaviour for the better through intelligence-led design.

How can we promote social marketing to relevant practitioners and key decision-makers?

We have to treat them like any other target audience. So, we first need to do some clever market research with them to understand what their problems are and how they view the world. We have to get our thinking caps on and be creative - how can social marketing make their lives better? - then engage them with our intervention. It is easier said than done, but we have got some way already: we have done some interesting market research which gives us great insight. The biggest challenge for us is to be lean, effective and to take responsibility for what we promise.

What are the key ethical issues in trying to influence people's behaviour?

First there are the ethics of intervening anyway: we have to earn the right to interfere, have a mandate. Then, we need to take great care gathering intelligence in an ethical way (no easy task as we have found). We may have to go the democratic route if we are to make changes that benefit all but require a few to bear the brunt of the change. And we need to be seen as trustworthy.

How can we build capacity in social marketing?

Build capacity by engineering apprenticeships with successful social marketers working on the front line. Success breeds success.

How can we use social marketing to tackle the big international issues, like climate change?

No differently to anything else, except the target audience is harder to get to and influence. There are several segments that need to be tackled separately and collectively: the power brokers, those behaving badly, the culture and so on. Each segment needs a different intervention.

NAME

Dr Ray Lowry



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What book would you recommend to people to help them understand social marketing?

Gerard Hastings, *Social Marketing: Why should the devil have all the best tunes?*

“We have to earn the right to interfere”

How did you become involved in social marketing?

It goes back a long way - over 25 years - when I took a research assistant position at the University of Strathclyde's advertising research unit. It was then funded by the Scottish Health and Education Group, a government agency doing health promotion. We pre-tested campaign advertisements, everything from rickets to obesity, which gave me a very good insight. One thing that was very apparent at that time was that communications alone were insufficient to effect behaviour change: other levers were necessary.

At the end of the 1980s, the head of the unit, Douglas Leather, died and I took over and ended up running it by default. At that time there was a lot of reorganisation going on and we had to create a business plan for the research centre which resulted in a far wider range of clients than the Scottish Health and Education Group. It was very beneficial because it made us think about what we were trying to achieve. We changed title to the Centre of Social Marketing in the early 1990s, broadening our client base.

“We are trying to do the same job as Tesco”

What is social marketing?

In the UK, I think we are trying to do the same job as Tesco, but in the social sector. People are very familiar with how marketing works in the commercial sector. They now understand a word like 'brands'. When I started, people in public health did not know what brands were. I would ask them to tell me about marketing and I would say that is what social marketing is, but in a social context. I would ask audiences to think about what they bought recently and think and talk about it. It is a very engaging and lively topic of discussion. We are very much a consumer society.

Social marketing increasingly encompasses people from both marketing the social sciences. What are the challenges in integrating learning from different disciplines?

In reply I'll mention the old Churchill quote about the British and Americans being divided by a common language. People don't mean the same thing. There are land mines to be looked out for. For example, it could trigger a degree of professional jealousy, particularly if people think it could supersede public health. But what it does do is bring insights to interested practitioners, like GPs. They have to be everything to everyone, and they can be great social marketers as they build relationships with people in the community.

NAME

Professor Gerard Hastings

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If you were trapped in a lift for ten minutes with the Prime Minister, what would you ask him?

I would tell him that there is a lot to learn from Tesco about influencing behaviour, and that partnerships are the way forward, the way to pull people together to get some action to improve public health. I would try and sell him the idea of having a semi-independent organisation headed by someone like Sir John Krebs, a scientist and independent thinker. This would pull together key stakeholders on an equal footing, like the British Heart Foundation and Cancer Research UK, on a ten- to 25-year basis, and with an agreed budget. The aim would be to improve public health by getting people more engaged.

What one thing have you learnt that you wish you knew 20 years ago?

People are people. They are complex and do stupid things but this doesn't mean they are stupid.

How did you become involved in social marketing?

It was some years ago, and it was the opportunity to get involved with Public Service International (PSI) and Porter Novelli. Both had social marketing challenges. With PSI it was family planning in the developing world, and with Porter Novelli it was the high blood pressure challenge in the US.

What is social marketing?

My short answer would be the application of marketing concepts, many of them drawn from the private sector, that can be helpful in developing programmes to influence target audiences to adopt socially desirable behaviours.

What advice would you give to someone developing their first social marketing intervention?

My one piece of advice would be to make sure that you are trying to influence a very precise behaviour or set of behaviours, and know exactly who your target audience is and what they think about the behaviour. Why? Because a lot of campaigns tend to try to tackle too much or try to worry about attitude change or influence. They create what are really education programmes rather than focusing on things that actually influence behaviour.

How do you think we can best build capacity in social marketing?

I think that the more we can develop, and be seen to have developed, good off-the-shelf tools, checklists, examples, frameworks and so on, that people can easily use, the more success we will have. Also, providing methods for social marketers to communicate with each other, through blogs, listservers and other media, can be very helpful in advancing the field.

What needs to be done to build the workforce in social marketing?

I am frustrated by the dearth of academic training in social marketing. At the very least, I would like to see more courses or interesting programmes in schools of public health; in programmes involving the environment; and in business schools, in order to develop a future workforce.

What are the challenges faced by an organisation with limited funds to invest in a social marketing intervention?

Try to find allies to work with so you can develop some level of scale. Another solution is to be as narrow as possible in your behaviour objectives and in your selected

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**Professor
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target market. You have to recognise that you can't go after everyone. The more 'micro' you can be in your objectives and target audience, the more likely the budget will be well spent.

What book would you recommend to people to help them understand social marketing?

There's a very good one by Rob Donovan and Nadine Henley based on their work in Australia. The book by Kotler and Lee gives lots of examples and is valuable for that. Gerard Hastings' book is very recent and especially good at giving examples from a European perspective.

What other question should we have asked?

One question I don't know the answer to is how consistent we all need to be in using the same basic approach right now; we don't have the same frameworks. If a client was to hire me or someone from the NSM Centre we would come at it in different ways. This may lead to confusion.

How did you become involved in social marketing?

I came from community organising and was frustrated by the dependence on charismatic leadership and the lack of measurable success. And yes, I needed a job. There was one available in social marketing. I had never heard of social marketing until the job announcement. I was young and inexperienced and thought I knew everything, but social marketing was a wonderful way to learn about people.

What is social marketing?

I still think the 'Four Ps' are the simplest and best description. Social marketing is about creating products and services that help people solve social problems. Then it prices, places and promotes those products and services in ways that motivate their widespread and correct use. It's a practical and very effective way of tapping into people's legitimate self-interest (not selfishness) to influence their behaviour for everyone's benefit. You cannot understand social marketing unless you understand the difference between self-interest and selfishness. Self-interest is often defined in social marketing as consumer orientation.

Recognising that social marketing is understood (and misunderstood) in a range of ways, the NSM Centre developed the 8-point Benchmark Criteria for social marketing, building on previous work by Alan Andreasen. How useful do you find them?

I think they are helpful as checklist for experienced marketers. Marketing Mix is a problem because too often we focus on promotion only. Insight seems a bit redundant with customer

orientation, but probably useful. I'm not crazy about the discussion of behaviour because it opens itself to this nonsense about 'individual behaviour versus social behaviour'. All behaviour is individual. There are powerful social influences, but it is still influence on individual behaviour. This is so hard to get people to understand. My favourites in the list are Exchange and Competition because I think they are new ideas social marketing brings to the social change table.

Social marketing increasingly encompasses people from both marketing and the social sciences. What are the challenges in integrating learning from different disciplines?

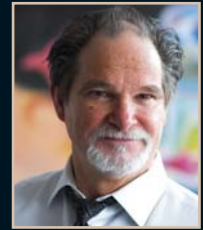
Social marketing, like commercial marketing, is an eclectic practice. It assimilates other professions. That is one of its greatest strengths. As long as the goal is voluntary behaviour change on a large scale I am very eclectic about tactics. I worry more about missed opportunities when people come to social marketing from long careers in advertising, health promotion or environmental education or even from advocacy and don't understand what else marketing can bring to the table.

What book would you recommend to people to help them understand social marketing?

There are so many. It depends on your goal. As an introduction, I like the materials that the National Social Marketing Centre has developed. If you're looking for managerial insight I like *Reinventing Government* by Osborn and Gaebler. If you want practical every day advice you can use on Monday, *Made to Stick* by Heath and Heath is one of my favourites.

NAME

**Dr
William
Smith**



POSITION

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What other question should we have asked?

Why do the NSM Centre believe so deeply in self-interest as the key to voluntary behaviour change? Because I am an old-fashion populist who believes that people deserve what they want. I have great faith in the ability of people to know what they need and in their right to have fun, choose the best course of action and enjoy the praise of their family and friends. Sounds a little like making social change fun, easy and popular for them.

Where can people find out more about your work?

Social Marketing Quarterly is a good place to look, and the AED website.

How did you become involved in social marketing?

I first got into social marketing in 1988 after a long career in both the private and public sectors. I was working in the health sector at the time with a management role in public health, which also was responsible for corporate communications and public involvement. When I discovered there was something called social marketing I had a 'eureka' moment: this is what I'd been looking for!

What is social marketing?

For me, social marketing is about being led around by the nose by the people you are seeking to serve. It's about applying best practice evidence about what we know works in helping people change. And it's a systematic process that rigorously builds evidence and data-driven solutions that people will buy into. I would also want to say something about what social marketing is not, as there are many misconceptions. Social marketing is not about developing smart communications programmes. It's about developing services and products that people want, and making the benefits of socially responsible behaviours outweigh the costs of not changing.

What should we be doing to develop a robust shared evidence base?

We all have a responsibility to capture and learn from what we are doing. In social marketing this is key, so that we can reflect on what has worked and what hasn't, and so build better interventions. Everyone has a responsibility to share as widely as possible what they have learnt, especially when things do not go as planned.

What are the key ethical issues in trying to influence people's behaviour?

It seems to me that the key issue is who defines what a particular socially positive behaviour or outcome is. If you are lucky, as we are, to live in a democracy, people vote for administrations that set out policies that have political support. So I think a collective decision about what issues need to be addressed and how they should be addressed is probably the best way of ensuring that people are not manipulated or forced into behaviours that as a collective we would oppose. This does mean that some people will have certain freedoms curtailed, or may be penalised if they behave in certain ways. For example, smokers' rights to smoke may be restricted in certain places. Personally, I include interventions such as legal restrictions and financial incentives as part of social marketing. They can be used to great effect to encourage or discourage behaviour, and provided that there is popular support for these measures and they are arrived at through democratic means and good evidence, such restrictions or incentives should be used.

NAME

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What book would you recommend to people to help them understand social marketing?

I would recommend Max DePree's *Leadership is an art*. It's not a book about social marketing, but it is a great little book, that I first read many years ago, that convinced me that if you want to help people you need to first understand them and then serve them.

About the National Social Marketing Centre

The National Social Marketing Centre (NSM Centre) creates solutions to behavioural challenges by applying science and intelligence from every relevant field of study.

The NSM Centre was established in December 2006 following a two-year review of social marketing in England. This review found that a systematic social marketing approach could provide an effective means for addressing a wide range of health and social issues such as obesity, road safety, and environmental sustainability.

The NSM Centre is now working to build greater understanding of what constitutes effective behavioural interventions and how a people-focused social marketing approach can enhance public sector policy, strategy and delivery.

Rather than campaigns and projects, the NSM Centre focuses on building capacity and developing tools and resources to assist organisations to manage or commission their own social marketing programmes.

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The NSMC is a
strategic partnership
between government
and Consumer Focus

