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social marketing knowledge book

your reference guide
for positive change

Welcome

This book provides a quick guide for anyone with an interest in directing or managing a social marketing campaign or initiative. It is designed to accompany training in social marketing.

In reviewing the basics of social marketing theory, and detailing some of the latest thinking, it should give you a deeper understanding of how social marketing techniques can become a powerful tool for change.

An introduction to social marketing

- 3 A definition
- 4 A brief history
- 5 Characteristics of social marketing

The theories of social marketing

- 6 Theories of behaviour change
- 8 Behavioural economics
- 9 Heuristics and how we act
- 10 Theories of social change
- 12 The model of change used by government communicators
- 14 The personal motivations to act

How to deliver a social marketing initiative

- 16 Creating a fit-for-purpose social marketing plan
- 18 Understanding what best practice looks like
- 20 The skills needed for good social marketing
- 22 The strategies you can use as a part of your plan
- 24 Overview
- 26 Some final thoughts

Let's start this journey through social marketing with a definition... →

A definition

A 2006 study by Dr Jeff French and Clive Blair-Stevens defined social marketing as:

“...the systematic application of marketing – alongside other concepts and techniques – to achieve specific behavioural goals for a social or public good.”

But the concept goes back a little further. Let's look at the history... →

A brief history

If social marketing is considered as a structured approach to social change, then it's been around for a while.

If it's about understanding what influences people to behave in particular ways, that's also been around for quite a while.

Here are some key dates around social marketing's recent evolution:

1950s: Sociologist G D Wiebe was concerned that marketing was not being applied to 'selling brotherhood like soap'

1971: Philip Kotler and Gerald Zaltman first use the term 'social marketing'

1983: Prochaska and DiClemente theory of behaviour change

1990s: Textbooks from Andreason and from Kotler and Lee

1999: Creation of Social Marketing Institute

2006: Foundation of the National Social Marketing Centre, UK

2008: First World Social Marketing Conference
New UK National Occupational Standards in social marketing

We also need a grasp of the language of social marketing... →

Characteristics of social marketing

Social marketing usually includes the following concepts:

Customer: the people whose behaviour we are seeking to change.

Intervention: the action taken to lead to behaviour change.

Research: a deep understanding of the customer – their knowledge, attitudes, beliefs and lifestyles.

Behaviour change: encouraging people to act in a different, more positive way.

Segmentation: breaking down audiences into subgroups to increase the effectiveness of an intervention.

Barriers: anything which prevents the customer from completing the desired action.

Competition: competing alternative behaviours or motivators.

Theory-based: the use of theories of behaviour and social change.

Product: whatever products or services are used to make it easy for people to act.

Collaboration: understanding which other organisations share the social goal and working with them in a structured way to achieve it.

Skill mix: the competencies needed for social marketing – drawing on skills in research, psychology, communications, public affairs, community engagement and many more.

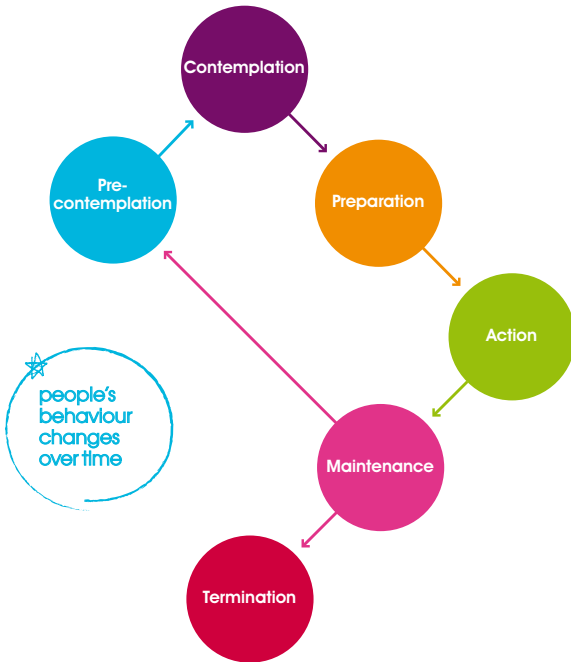
Engagement: involving customers and collaborators in imagining and delivering the behaviour change programme.

For help, you can draw on theories of behaviour change... →

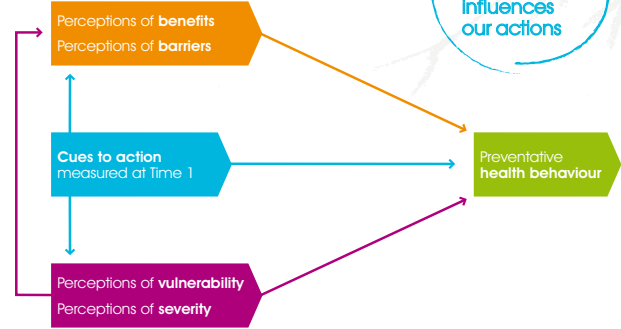
Theories of behaviour change

Here are a few theories of behaviour change that you will come across, or that others might mention.

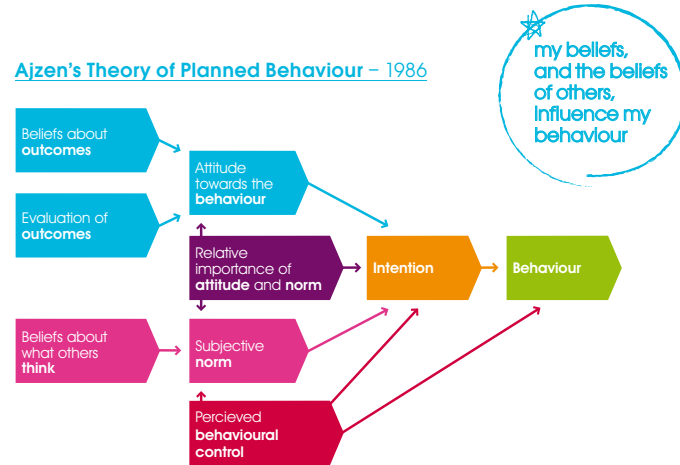
Prochaska and DiClemente's Transtheoretical Model of Health Behaviour Change – 1992



Rosenstock's Health Belief Model – 1975



Ajzen's Theory of Planned Behaviour – 1986



A good summary is available in Andrew Danton's report for the GSR (Government Social Research), July 2008.

Then there's behavioural economics...

Behavioural economics

In a 2005 report, The New Economics Foundation identified seven principles for policy makers which continued to challenge traditional economic theory.

The seven principles are:

- 1 Other people's behaviour **matters**.
- 2 Habits are **important**.
- 3 People are **motivated** to do the right thing.
- 4 People's self-expectations **influence** how they behave.
- 5 People are **loss** averse.
- 6 People are **bad** at computation.
- 7 People need to feel **involved** and **effective** to make a change.

Source: Behavioural Economics, 7 principles for policy makers, New Economics Foundation.

So how do we make decisions that contribute to behaviour change?
One theory is that we take shortcuts to making decisions often based on past experience...

Enter the world of heuristics... →

What are heuristics?

Heuristics are shortcuts we take to make decisions. The idea was first mentioned in 'Judgement under uncertainty' by Tversky and Kahneman in 1974.

They talked about three heuristics:

1 Representativeness

Decisions are made on likeness to previous outcomes.

2 Availability

The likelihood of an event is assessed by the ease with which it can be recalled.

3 Adjustment/anchoring

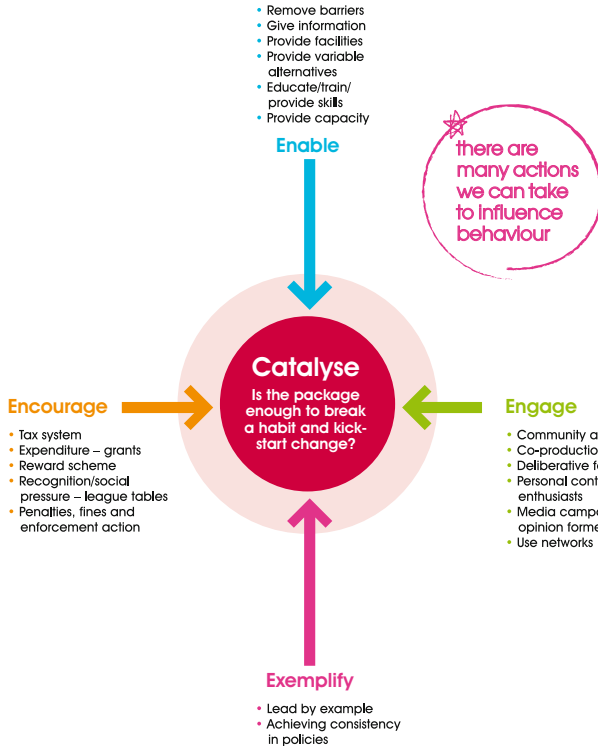
People make judgements based on having a reference point (where they start from).

Successful behaviour change can also deliver social change... →

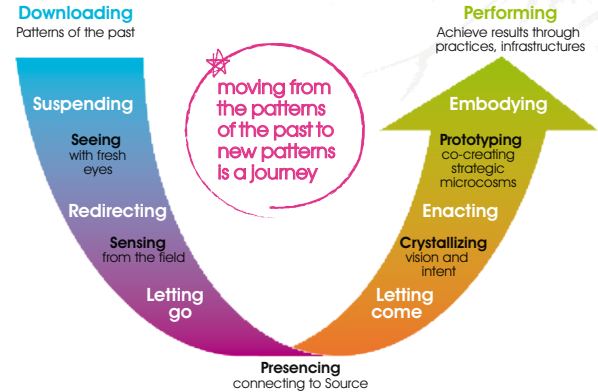
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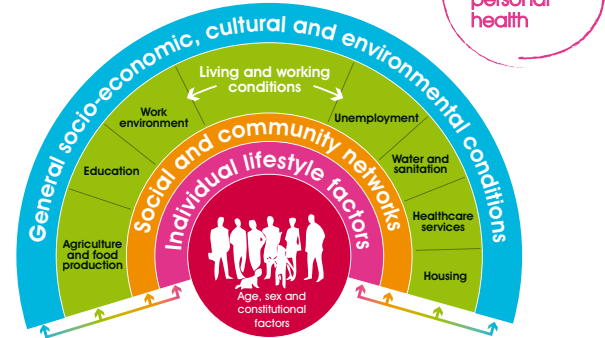
Defra's 4 Es model – 2005



Scharmer's Theory U – 2008



Dahlgren and Whitehead's Main Determinants of Health Model – 1991



Which communications approaches are most effective?
Let's look at the method used by UK government communicators...

The model of change used by government communicators

The Engage programme is a model used by the Government Communications Network to improve the effectiveness of government communications.

Behind it are eight principles:

- 1 Listening, consulting, understanding, questioning to obtain insight into people's motivations, needs and barriers.
- 2 Segmentation makes communication more effective. Identifying people with distinctive shared needs, characteristics and beliefs gives a sharper focus to policy and communication.
- 3 Changing behaviour is often essential to policy delivery. That involves working with colleagues to help identify the interventions that will encourage change, and develop communications that will support them, and really engage audiences.
- 4 Propositions should express policy in a way that makes sense to people and gives them a clear understanding of what's in it for them or for society.
- 5 Reaching people in complex communication environments means considering a wide range of media, channel and stakeholder options.
- 6 The best 'people experience' is achieved when the views of the public are fed into all aspects of policy development and service delivery.
- 7 There is a need to collaborate with policy and service delivery partners and stakeholders to improve communication and encourage effective engagement with audiences.
- 8 Being open and accountable in communication and marketing activities, adhering to civil service values of integrity, honesty, objectivity and impartiality.

The personal motivations to act

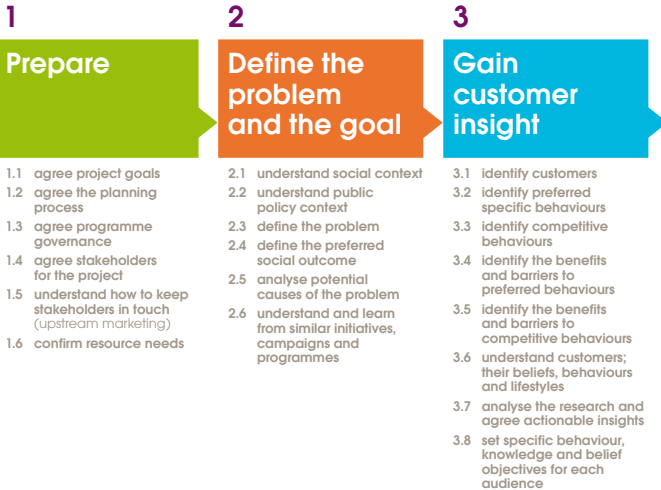
This theory defines 14 key factors that motivate personal action, with pointers to how they might be used:

- 1 **An intimate personal understanding of me**
 - Understand me and use my language.
 - Remember, I use words, metaphor, stories, images and experience to understand the world.
- 2 **Intuition**
 - Most of my decisions to act are made instinctively.
- 3 **Good reasons**
 - Give me the facts and the reasons for taking one action over another.
 - Use authorities, sources or third parties to add credibility.
- 4 **Benefits to me**
 - There's got to be something in it for me.
- 5 **Emotion**
 - I make all decisions on a combination of reason and emotion.
 - Use the senses to tap into my emotions.
- 6 **Fear/fear of loss**
 - I am motivated by fear of what might happen to me if I act or if I do not act.
 - I am also motivated by the fear of missing out on something others are enjoying.
 - The closer the risk is to me in space and time, the higher my motivation to act.
- 7 **Control - I need...**
 - to have some control to make any changes;
 - to have the will and the skill;
 - to know my action will lead to change for the better; and
 - a choice.

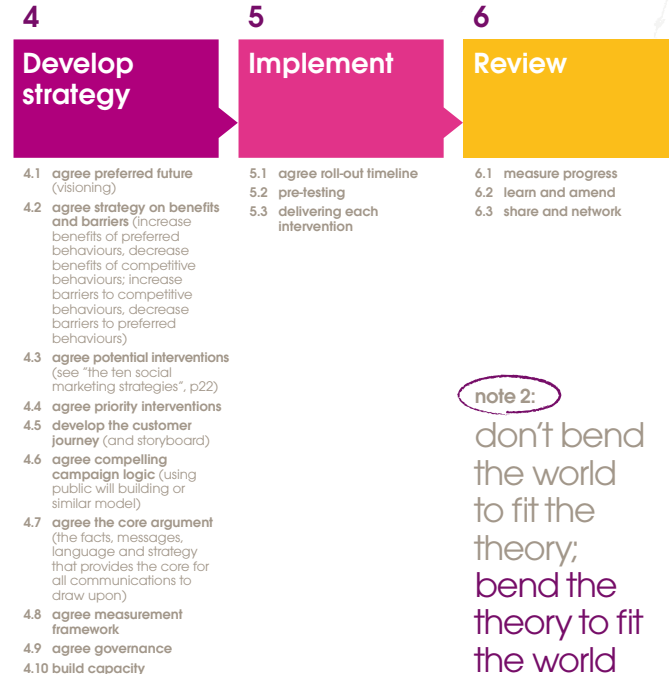
- 8 **Principles**
 - I make sense of my experience by turning it into principles that guide my life.
 - I then have a powerful need to be consistent to myself.
 - Small commitments lead to bigger commitments.
- 9 **Fits into my life**
 - Any action needs to fit into my daily life.
 - It needs to be easy for me to act.
- 10 **Need to know**
 - I have an insatiable need to know more and to make sense of the world.
- 11 **What others do**
 - I am influenced by the behaviour of others.
 - I am influenced by the beliefs of others.
 - If you show me that everybody's doing it, I am likely to do it myself.
- 12 **Need to belong**
 - I need personal contact with others and a feeling of belonging.
 - I want to be with others who share my needs, interests, beliefs and desires.
- 13 **Aspirations/goals**
 - I want to improve things for myself.
 - I have this powerful notion of who I am and who I want to be.
- 14 **Benefits to others**
 - I also want meaning in my life.
 - Part of that meaning comes from helping others.

Creating a fit-for-purpose social marketing plan

Our view is that there are six key steps to creating an effective social marketing plan:



note 1:
the process of creation is not linear



note 2:
don't bend the world to fit the theory;
bend the theory to fit the world

Understanding what best practice looks like

The UK's National Social Marketing Centre has created a list of eight benchmark criteria, which can be used to guide best practice in the field. During the course of its creation and application, an effective social marketing campaign will examine:

Customer orientation

Developed using effective market and consumer research and combining data from different sources, a robust understanding of the audience is crucial to informing any social marketing initiative.

Behaviour

Your campaign must have a clear focus on behaviour, based on a strong analysis; building a detailed picture of the current or 'problem' behaviour patterns, and the desired behaviour you wish to encourage.

Theory

Your intervention must have a grounding in behavioural theory – drawing on an integrated framework. This should inform and guide development, and take into account behavioural theory across four primary domains: bio-physical, psychological, social and environmental.

Insight

Drawn from the orientation stage, insights into what moves and motivates the customer are key to positively influencing behaviour, and should be used to shape the form taken by the intervention.

Exchange

The perceived or actual costs/barriers which prevent the audience adopting the desired behaviour can be challenged with perceived or actual benefits. Incentives and disincentives can be tailored according to specific audiences, based on what they value.

Competition

Understanding what competes for the time and attention of the audience – including other campaigns, advertising or psychological drivers – is important when developing campaign messaging.

Segmentation

Effective interventions are often those tailored to audience subgroups, using methods such as traditional demographic targeting to identify what moves and motivates different people.

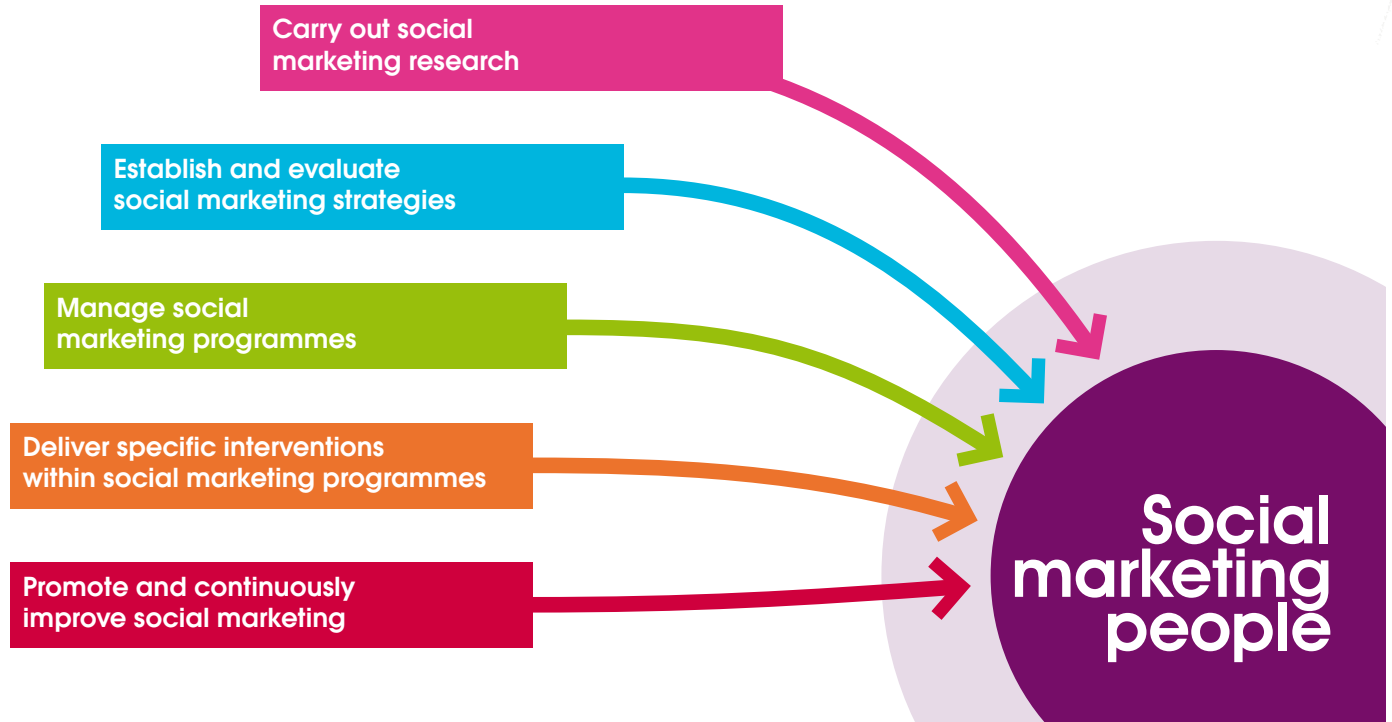
Methods mix

In effecting behaviour change, you should avoid reliance on single methods: rather a variety of approaches should be developed, taking full account of any other interventions in order to enhance the overall impact.



The skills needed for good social marketing

New National Occupational Standards have been developed for social marketing in the UK. The standards identify five key areas of competency:



At the heart of your plan will be a range of strategies ...

The ten social marketing strategies you can use as part of your plan

There are many potential strategies that can be used as part of social marketing plans. Here we list ten.

One: social issue analysis

A deep understanding of the social goals and the social, environmental and economic context.

Two: listening

Deep listening to understand people, their beliefs, behaviours, lifestyles and attitudes leads to actionable insight.

Three: communicating

Creating a powerful, consistent look and feel and key messages targeted at specific, clearly identified audiences.

Four: public policy

Understand current policy. Define preferred policy. Define key audiences. Agree an influencing strategy to ensure public policy alignment to help achieve social outcomes.

Five: infrastructure and systems

Influence or create the infrastructure and systems that make it easy to act – defining the infrastructure and systems dependencies, obstacles, preferred systems and process to achieve a supportive systems context.

Six: products, services and choices

Define relevant products and services. Agree the strategy to benefit from access to existing relevant products or services. Influence the development of existing or new products or services relevant to the achievement of the social outcome.

Seven: collaborative actions

Define the need for collaborative action, potential collaborators in the public, private and third sector, and a strategy for collaboration and governance frameworks.

Eight: community and grass-roots action

Develop strategies tapping into or creating supportive neighbourhoods, communities of interest, advocacy programmes or digital networks.

Nine: participation and engagement

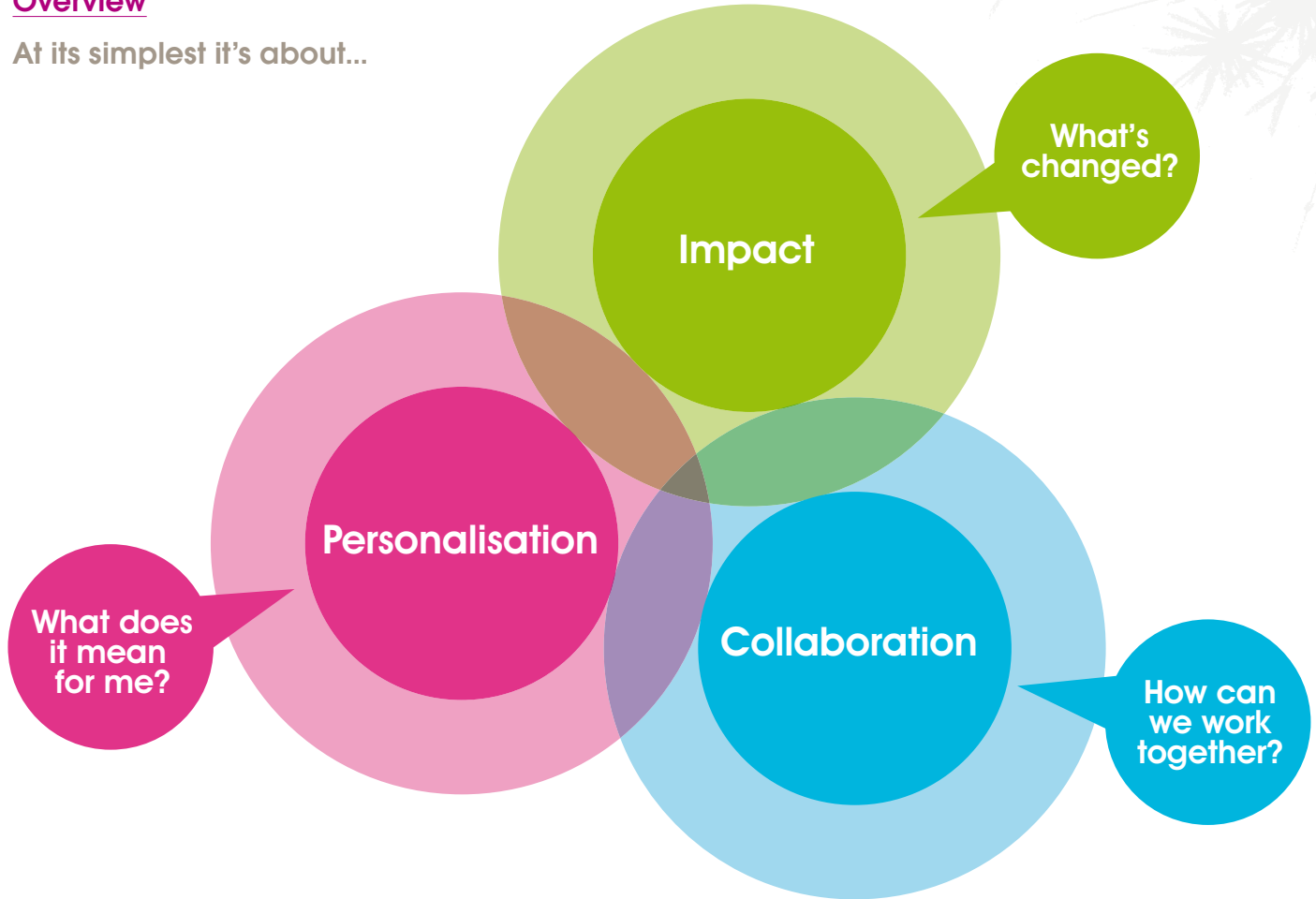
Develop appropriate strategies to encourage continuous participation and engagement and to increase capability to act.

Ten: organisational change

Agree what needs to change in the delivery organisation – where we are now, where we want to be and how to get there.

Overview

At its simplest it's about...



Some final thoughts

“Always remember that you are absolutely unique. Just like everyone else.”

US anthropologist Margaret Mead.

“Go to the people. Live with them. Learn from them. Love them. Start with what they know. Build with what they have. But with the best leaders, when the work is done, the task accomplished, the people will say ‘we have done this ourselves’.”

Chinese Taoist philosopher Lao Tzu (600 – 531BC).

“We must engage and involve with people on the issues they face in their everyday lives.”

UK Prime Minister Gordon Brown, September 2007.

“Honest disagreement is often a good sign of progress.”

Mahatma Gandhi.

“A small group of thoughtful people could change the world. Indeed, it’s the only thing that ever has.”

US anthropologist Margaret Mead.