

18 April 2017

Dear Kiwi social marketers

In the 1960s Kotler and Zaltman coined the phrase “social marketing” to describe the *use of behavioural science and commercial marketing techniques to “sell” a personal or social outcome.*

So here we are, half a century later, and just as Coke spends many millions of dollars to understand and influence purchase behaviour for a fizzy drink, so do we social marketers invest to create and maintain particular behaviours.

Recently I had an epiphany when I realised the challenges of running a successful programme keep coming back to some basic first principles... and these principles keep getting dressed up different ways. The academics keep slicing and dicing, adding in subtleties and sprinkling fancy jargon into the mix. And practitioners keep popping up as experts du jour to nourish an eager audience with their case studies and supposed newfound insights.

Every now and then there is a quantum shift with a genuinely new technique or approach, but often there are variations on well-established themes.

Different labels, different language, different emphasis.

Everything changes, but everything stays the same.

So, I thought a distillation of these principles would be a worthwhile thing to do. It is a gift to the kaupapa of social marketing after 30 years of listening, thinking and doing.

I have seen these principles at play in my work on alcohol moderation, smoking cessation, injury prevention, disaster preparedness, road safety and preventing family violence. As well as this direct experience I have also stayed in touch with the evolution of academic constructs and other practitioners’ strategy and implementation techniques.

My world view has been expanded by the contributions of many – Prochaska & DiClemente, Donovan, French, Bauman, Novelli, Andreasen, Hastings, McKenzie-Mohr, Lefebvre, Maibach, Bridges, Surgenor – to name the most significant.

I have learnt the languages of the 4 Ps, diffusion theory, education fallacy, stages of change, social cognitive theory, health belief model, protection motivation theory, behavioural insights aka “Nudge”, the EAST model, community based social marketing... and many more dialects.

It’s a fascinating journey.

It will be interesting to see how these principles evolve over the next few decades.

A handwritten signature in blue ink, appearing to read 'Nick Farland', with a stylized flourish at the end.

Nick Farland

# Social marketing – first principles

## Underpinning successful programmes in New Zealand and around the world.

Although every task is different, there are factors that academics and practitioners agree can increase the likelihood of success in behaviour change social marketing. It remains deceptively difficult to actually follow these principles, let alone do them well, because there are myriad factors that can get in the way; availability of resources, leadership philosophies, personalities, political imperatives, degrees of community support, etc. So regard these as a guide and an inspiration.

Think of these principles as musical chords. The music you make depends on which chords you use, how you arrange them and how you play them. If you can compose a symphony, then go for it – but remember that hearts and minds have been moved with just three chords. Here's a link to prove the point: <http://www.nme.com/blogs/nme-blogs/12-amazing-songs-with-just-three-chords-7381>

# 1

### Acknowledge that sustained mass behaviour change generally takes time



That means a sustained effort of playing the long game. For example, gains in road safety and smoking cessation have come on the back of decades of activity.

Senior managers and/or political masters often expect immediate results due to either naivety or political imperatives. These expectations need to be actively managed. You can look for quick wins by doing pilot work or research, but the real gains come from sustained effort and that needs to be budgeted for – over successive years.

# 2

### Set clear, measurable objectives that focus on action taking... and ensure your objectives match the available resources and time



Defining what you want to achieve is the crucial part of any programme and social marketing is no different. If the focus is behaviour change and/or maintenance, then you will need to define what behaviour you are targeting.

This can be challenging, as programme managers often get asked to achieve multiple objectives and/or the organisation wants to leap into action without doing robust analysis of the issue or the audience.

Doug McKenzie-Mohr encourages a rigorous process to identify very specific behaviours that have the greatest impact and are most likely to be adopted. Sounds easy, but it isn't. You need to take the time to generate options, source and analyse data and insights about those options, possibly consult with experts, make some objective judgements and then get them agreed.

This may mean managing expectations within your organisation as well as your community and political stakeholders who may have a different objective view – or worse, a passionately held subjective view of the issue.

It is also handy to remember **SMART** – in any one of its guises:

<b>S</b>	specific, significant, stretching
<b>M</b>	measurable, meaningful, motivational
<b>A</b>	achievable, agreed upon, attainable, acceptable, action-oriented
<b>R</b>	realistic, relevant, reasonable, rewarding, results-oriented
<b>T</b>	time-based, time-bound, timely, tangible, trackable

Ensure you have the resource and time to achieve the objectives. Sometimes it's better to take "baby steps", rather than biting off too much.

Piloting activity, or undertaking small-scale activity in a contained way, and evaluating as you go means you can experiment without committing huge resource. It can be a good way to learn and adapt your approach or "fail fast".

# 3



## Define your audience(s) and understand why they do what they do

Interrogate your data and market intelligence to identify your audiences as best you can.

Ask yourself key questions like: Who is most at risk? Who experiences or causes the most harm? Who is most likely to change? What behaviours are they doing? What could they reasonably be expected to do? Who is easiest to reach? Who represents the best return for investment?

Then come at the task from your audience's perspective. Understand their world, their values, their pragmatic realities and the context for them making the decisions they make.

And don't expect logic and rationality to be driving things – we humans are imperfect, complex social animals who can do stuff for very emotional and non-rational reasons.

One of the key tenets of behaviour change is that change will not occur until you are convinced that the *benefit of the change outweighs the cost of making the change*. Cost can be multi-dimensional – financial, physical effort, emotional energy or social standing.

So, look for what might be motivating them to do the right thing (the perceived benefits) and what barriers they have to doing the right thing (the perceived costs). Some call this a “value exchange”. We must answer the “what's in it for me?” question from the audience's perspective. They will be consciously or subconsciously asking themselves,

### “Will I gain more from changing or am I better off not changing?”

Not all people will change. Some people will change, but at their own speed – some will leap into action while others will nudge their way along a continuum, some will get stuck and not progress, some will go back to the old behaviours, some may attempt change many times before being successful. Prochaska, DiClemente and Norcross encapsulated this with the “stages of change” model – defining the states of pre-contemplation, contemplation, action and maintenance. It can be useful to know where your audience is distributed across that continuum and why.

Another way of approaching it is to think about groupings of individuals who share behavioural motivations and barriers. Think about gender, socio-economics, geography, seasonality, life style and psychographics (values and beliefs). This is a “segmentation” approach that allows you to develop specific messages and/or use specific delivery channels to target the grouping, rather than an ill-defined mass population.

Be aware that an individual's behaviour may not be constant or consistent – they may shift between “segments” as they age or depending on the social environment they're in at the time or possibly even depending on what specific activity they're doing at any one time.

Also think about who influences your audience's behaviour as they may be separate target audiences in their own right (see point 8). This is especially true if you need to change a widely practiced social norm. If your audience sees people they respect saying and doing particular things, they just might follow suit.

Be aware of cultural influences. One size does not fit all. Be prepared to walk in multiple worlds and do different things in different spaces.

Nirvana is if you can find a universal human truth that works across demographics, psychographics, socio-economics and cultures.

# 4



## Define what you are “selling” and make it easy to “buy”

Changing the behaviour of a lifetime or starting anything new is not easy. Think about your own efforts to eat healthy, exercise more, drink less or adopt some other new way of being.

So, how can you position your offering or “product” so that it has a compelling benefit for your audience? For example, are you selling “voting” or are you actually selling “making your voice heard”? Are you selling “sports injury prevention” or is it more like “be able to keep doing the activities you enjoy”?

Also, how can you assist people to make the “purchase”? Mental health has done this with online counselling advice that removes the delay and potential shame of one-on-one counselling (and has also made it easier for the sector by reducing the demand on professionals). Smoking cessation has done it with Quitline – similarly providing support and mentoring online or via phone and providing nicotine weaning products that address a very real barrier to change.

# 5



## Develop integrated, multi-faceted marketing activity – so that you come at the audience from a number of different angles but in a co-ordinated, coherent way

Rittel and Webber talked of “wicked problems” in 1970s social policy and you can look to Robert Horn’s definition of “social messes” to see how social marketing fits into that frame as well. This reminds us that complex, multi-dimensional issues demand “wicked solutions” – or similarly multi-dimensional responses.

So, it is also important to take a systemic approach. Social marketing is way more than an advertising campaign. It is an analysis of all of the elements that affect behaviour – looking for where interventions can be most effective. It may involve a policy change, new legislation, service redesign, partnerships, promotion and/or any of the other levers we have.

McKenzie-Mohr talks of “decision chains” which acknowledges that doing one behaviour actually requires a series of decisions or actions and a programme could potentially do things to address many of them rather than just addressing the main behaviour.

There is no silver bullet. Sustainable change generally comes from doing many things in many different arenas in a co-ordinated and coherent way.

A lack of budget should not be a constraint. This just means you have to be clever at finding low cost/no cost approaches and utilising partnerships (see point 10).

# 6



## Have a multi-faceted monitoring and evaluation framework

If you have a multi-factor programme then it is sensible to have as many ways as possible to monitor what is happening (or not) and why.

If you want certain actions to happen then that is what should target and monitor, rather than just awareness and understanding. It can be difficult and you may have to rely on proxies like intention to change and/or reported behaviour.

Formal research gives you objective information, but it is also valuable to source anecdotal feedback from staff in the field and stakeholders (after all they’re seeing reality day by day). You could also monitor collateral uptake, social media traffic, media coverage, website analytics and advertising placement reach and frequency. Ensure you budget for campaign monitoring at the front end.

It is also useful to pull back and look at the bigger picture of what is going on in society in general. Scanning of social trends, political philosophies in action, marketing activity of commercial brands, other social marketing activity, etc, etc. can help you see what else is going on in the world that might be helping or hindering your programme.

Make success known, because success breeds success. And share learnings on why things are, or are not, working as it helps to manage stakeholder expectations.

# 7

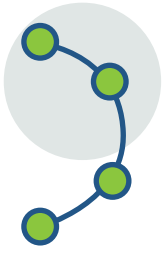
## Adapt the programme as you learn

The next step of logic is actually responding to what you learn.

Organisations can be poor at this – either unwilling to adapt in case it appears like admitting failure or taking too long to make decisions to make change when it's required.

Set the expectation that evaluation will be used to learn what working and what isn't and that the programme will adapt as it goes.

Think how consistent, yet constantly adaptive, NZTA/Police have done this with their road safety approach. This is because they have built a powerful evidence base of consumer insights and technical data and use it to inform and adapt their programme.



# 8

## Involve your audience

Involvement begins with point 3 – understanding your audience's environment, values and behavioural drivers.

It can extend to participation in programme design before you go to market, so you expose your thinking to your audience's reality. When you listen to them you can build something that works for them.

It can expand further by involving ambassadors or spokespeople from within the communities or segments being targeted. This is harnessing the power of peer influence. Ambassadors can add credibility, trust and possibly a "cool" factor that your organisation or brand may not be able to achieve itself.



# 9

## Use the power of direct experience

As Benjamin Franklin said (and Confucian philosopher Xun Kuang said before him):

**“Tell me and I forget, teach me and I may remember, involve me and I learn.”**

So it is with behaviour change marketing. Experiencing something directly is more powerful than merely being told about it. Hence the power of experiential marketing done one-on-one or possibly through event management or via digital channels which offer myriad ways of personalising an experience.



# 10

## Develop and nurture partnerships

Others can help you achieve your goals. If they share a common goal, there's something in it for them too. This may be a government agency, an NGO, a commercial entity or brand, a celebrity, a community group, a media channel... or combinations of all these.

They can provide market intelligence or experience you need, they might provide reach into communities you cannot get to easily, they might provide trust and credibility and therefore positive influence you don't have or they might provide a low cost messaging channel. They might also be able to contribute financially.

Partnerships take time and effort. Trust needs to be earned. Each party needs to truly understand the other and rules of engagement must be mutually understood and agreed to. Mutuality is a crucial concept – things have to be brokered, rather than demanded. Honesty and integrity are crucial. Problems have to be addressed early.



Partnerships and coalitions also benefit from contacts at multiple levels of the organisations (e.g. Chief Executive/leader level and the operational delivery levels). If there's only one point of contact the connection can be weakened or broken when people move on to other roles.

# 11

## Take responsible risk

Many commercial marketers take risks because that is the way to find more effective and/or efficient ways of reaching audiences and influencing them. They often have to do things they or the organisation have not done before.



Organisations can be bad at this, thinking that it's safer to keep doing what has been done before, rather than do something different that might not work or risk criticism. But risk can be done responsibly using best knowledge available and with risk mitigation strategies in place.

NZTA/Police talk of the need to have approaches that may be “uncomfortable” and to have the strength of will to hold fast in the face of criticism that is often driven by opinion rather than fact. Like others, they use an evidence-based approach. If the evidence says they have made an error of judgement they change – but it is an objective decision, not a subjective one.

# 12

## Proactively involve stakeholders

This relates to all of other 11 points. Internal and external stakeholders can influence your funding and general operating environment – for better or worse. So they need to understand, have confidence in and actively support your programme. This way you have high ground cover and a range of influential advocates within the organisation and externally, particularly political stakeholders and community stakeholders.



They all generally prefer a “no surprises” approach. So, don't be afraid or lack the energy to relentlessly repeat your key messages to them and to merchandise success and front foot any failings.

It's often a case of “Tell them, tell them again, and then tell them you have told them”.

**It also means actively listening and showing that you have heard them.**

So, there you go – a dozen key approaches to think about and implement as best you can.

There are no guarantees of success, but following as many of these principles as possible will maximise your chances. Have fun making your music!

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