THE IMPORTANCE OF SOCIAL MARKETING FOR SOCIAL POLICY

Learning objectives

By the end of this chapter, readers should be able to:

• understand why social marketing is increasingly being incorporated into strategy development as well as the operational delivery of social programmes
• articulate some of the key weaknesses associated with many current approaches to social policy and strategy aimed at influencing behaviour
• describe the key added value associated with the adoption of a strategic marketing approach to social programme and policy development.
Introduction

In Chapter 2 we explore and define the nature of social marketing and strategic social marketing but it is worth beginning this book with two key definitions of what social marketing is.

Social marketing was defined by Lazer and Kelley (1973: ix) as follows:

Concerned with the application of marketing knowledge, concepts, and techniques to enhance social as well as economic ends. It is also concerned with the analysis of the social consequences of marketing policies, decisions and activities.

In 2013 the first consensus definition of social marketing was developed by the International Social Marketing Association in collaboration with the European Social Marketing Association and the Australian Association of Social Marketing. These organisations defined social marketing as follows (iSMA, ESMA, AASM, 2013):

Social marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviours that benefit individuals and communities for the greater social good.

Social marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, audience and partnership insight, to inform the delivery of competition sensitive and segmented social change programmes that are effective, efficient, equitable and sustainable.

As can be seen from these two definitions despite the intervening forty years the key focus of social marketing has remained constant, centred on the application and use of marketing principles, concepts and techniques to bring about social good.

Those forty years have seen social marketing become increasingly prominent in both marketing academe and in the social policy arena driven by increasing evidence that suggests it can be an effective social change approach in its own right (Gordon et al., 2006; Stead et al., 2007) and also because it can make positive contributions to social policy (French, 2011). Building on existing developments, the field is now proffering new ideas relating to management of the social marketing mix (Tapp and Spotswood, 2013), upstream marketing and policy (Gordon, 2013), interdisciplinarity, and strategic orientation (this textbook), applying service logic (Russell-Bennett et al., 2013), critical thinking (Gordon, 2011), value creation (Zainuddin et al., 2011), sustainability (Smith and O’Sullivan, 2012), and transformative thinking (Lefebvre, 2012). Calls are also being made for a broader, ‘systemic’ view of social marketing to be adopted (Hastings and Domegan, 2014).

Given its orientation towards practical social policy intervention design and delivery, social marketing also attracts significant research and development funds often not available in commercial marketing academe. The consequence is that social marketing is proving to be a testing ground for the conceptualisation, application and evaluation of new generic as well as social marketing concepts and theories. As Andreasen (2012) and
others explain (Polonsky in Dibb and Carrigan, 2013) the opportunities are considerable for social marketing to inform marketing, and indeed social policy and change management, as its acceptance as a legitimate discipline increases. However, to realise this potential social marketing needs to break out of the confines of being a field of study and application focused on just the operational delivery of social programmes and campaigns, and seek to influence the development and selection of social policy and strategy.

**Out with the old, in with the new**

This book aims to signal the need for a move away from an operationally focused conception of social marketing, a position that could be called *social marketing myopia*, towards a broader concept of social marketing, that we term *strategic social marketing*. Strategic social marketing is focused on the potential for social marketing to add value not only at an operational level of programme delivery that seeks to influence groups and individuals, but also at the structural, environmental, political and social level (Goldberg, 1995; Andreasen, 2002; Gordon, 2013).

The authors argue that a narrow conceptualisation and a myopic focus on operational implementation have led to unnecessary and erroneous criticisms of how social marketing has developed and limited its contribution to solving social challenges around the world. The authors seek to remind both advocates and critics of social marketing that even as it was first emerging, select scholars proposed a broader remit (Lazer and Kelley, 1973) than just the systematic planning and delivery of marketing-based social interventions.

Specifically, the strategic, holistic, and interdisciplinary approach to conceptualising and operationalising social marketing presented here seeks to describe how it can facilitate a more comprehensive and multi-faceted approach to social change, by applying marketing principles, concepts and techniques that can be utilised at individual, microsystem, mesosystem, exosystem, macrosystem and chronosystems levels, and also be employed as a tool for engaging in wider critical systems analysis and thinking to address systems, marketing and organisational factors that cause social harm or promote social good.

**Marketing focused social programme design**

The processes associated with developing effective social programmes designed to influence behaviour and bring about social progress are a challenge faced by all governments as well as a challenge faced by all public, private and NGO organisations. Social marketing, if it is to deliver its full potential to assist with the development, selection and delivery of such social programmes, needs to be an integral component of all social policy formulation and strategy development rather than, as it is often
currently conceived, as a second order operational function that is applied after policy
and strategy have been agreed.

To date the vast majority of the social marketing books that have been published,
with the exception of sections within Andreasen’s (2006) book *Social Marketing in the
21st Century* and Hastings and Domegan (2014), have promulgated a view that social
marketing is a positivist, individual psychology of behaviour and persuasion approach
that is applied to social change, largely ignoring wider socio-cultural factors and forces
that influence social outcomes.

This framing of social marketing and its contribution to social programmes we
believe has been useful, but ultimately diminishes the impact that social marketing can
have on social policy and programmes, and ultimately the effectiveness and efficiency
of those programmes and consequently their impact on specific social problems.

A central contention of this book is that marketing and indeed social change theory
principles and practice have expanded over the last forty years beyond programme and
promotions management but most social marketing texts do not reflect this fundamental
shift in theory and practice.

As a counterweight to this situation, in the ensuing chapters we have focused on
how social marketing can be applied to influence policy, strategy and operational
planning as well as the tactical delivery of social programmes designed to influence
behaviour. Through this more comprehensive framing of social marketing we have
sought to show that the application of current marketing principles can enhance
policy formulation and strategy development as well as the operational delivery of
social programmes. In essence this book seeks to reflect the need for social marketing
to extend the exploration of how it can be and is being applied ‘upstream’ (Goldberg,
1995; Gordon, 2013) to frame social policy and strategy as well at operational and
tactical delivery in a coordinated way. We focus on exploring the challenges and ben-
efits of applying social marketing at the policy and strategy level and in so doing hope
that social marketing will increasingly be seen, just as marketing is in much of the
for-profit sector, as an integral strategic component of all social policy and strategy
development activity.

**Social marketing informed social programme design**

It is vitally important that social marketing is incorporated into social policy and pro-
gramme design as we believe that it can, alongside other approaches to social
improvement, make a significant contribution to social good. This contention is sup-
ported by a growing body of evidence and experience about the limitations, drawbacks
and unintended consequences of implementing social policy that does not take into
consideration citizen needs and wants; and we explore these issues in Chapter 3. This
evidence is also supported by emerging new understanding about how people take deci-
sions, and how they can be influenced to act in socially and personally rewarding ways.
This understanding and its consequences for social policy and programmes are covered in Chapter 8. New understanding about how to design, implement and track social interventions has also been emerging as evidence informed policy making has gained momentum over recent years (Bullock et al., 2001). Learning from this evidence is reviewed in Chapters 11 and 12. Yet further evidence and insights are emerging from the management science, communications industries, webscience, the datafication of society, community engagement and empowerment methodologies and social design; we explore these issues in Chapters 4, 6, 7 and 10.

Books like *Nudge* (Thaler and Sunstein, 2008) and *Thinking, Fast and Slow* (Kahneman, 2011) and many others that seek to popularise some of our new understanding have hit the bestseller lists. Their contents are scrutinised by politicians and public policy makers and the recommendations that they make find their way into social policy solutions, from encouraging people to build up a pension, encouraging organ donations, the introduction of mandatory costs for disposable plastic bags, and minimum pricing for units of alcohol. However, rather than such a piecemeal or cherry picking uptake of ideas such as ‘framing’ or the application of behavioural ‘defaults’ it is necessary that we develop and apply a more systematic and cohesive approach to designing interventions that aim to influence people’s behaviour. This is one of the key strengths of social marketing, just like other integrating methodologies such as lean production (Womack and Jones, 2007). Social marketing is not dependent on situation specific factors such as brilliant innovation, creativity, strong organisational culture leadership or even on governmental support. Rather it is its focus on core processes and the application of core principles and concepts that deliver its added value.

The fantastic consequence is that while specific situational brilliance and leadership can’t be copied, superior development delivery and evaluation processes can. This means that social marketing informed social programme design is a globally applicable process.

**CASE STUDY**

**EPODE: ‘Ensemble, Prévenons l’Obésité des Enfants’**
*(Together, let’s prevent childhood obesity)*

EPODE is an acronym in French for ‘*Ensemble, Prévenons l’Obésité des Enfants*’ [Together, let’s prevent childhood obesity]. EPODE began in Fleurbaix and Laventie in 1992, which, at the time, had a population of 6,600 people between them. Everyone, from the mayor to shop owners, school teachers, doctors, pharmacists, caterers, restaurant owners, sports associations, the media, scientists and various branches of town government joined in an effort

*(Continued)*
to encourage children to eat better and move around more. The towns built sporting facilities and playgrounds, mapped out walking itineraries, and hired sports instructors. Families were offered cooking workshops, and those at risk were offered counselling. EPODE is a systemic coordinated, capacity-building approach aimed at reducing childhood obesity through a societal process in which local environments, childhood settings and family norms are directed and encouraged to facilitate the adoption of healthy lifestyles in children (i.e. the enjoyment of healthy eating, active play and recreation). In 2014 there were 25 EPODE programmes operating in 15 countries serving over 150 million people: this represents the world’s largest coordinated obesity intervention network.

The primary EPODE target groups are children from birth to twelve years old and also their families. The other target groups of the EPODE methodology are the local stakeholders, decision makers and people who influence the social and economic life of the community in relation to healthy lifestyles. The EPODE approach involves the development of a town, area or city based strategy and action plan. The EPODE philosophy is based on:

- a positive approach with no stigmatisation of any culture, socio-economic status (SES) or individual
- a concrete and step-by-step learning and sharing experience of healthy lifestyle habits
- the tailoring of messages and actions to the targeted population (e.g. according to age, SES)
- a sustainable implementation of the programme to enable communities to plan actions and environmental changes in the long term.

Social marketing is one of the four pillars of the EPODE approach:

1. A strong political will, thanks to the involvement of political representatives.
2. A coordinated organisation and approach based on social marketing methods.
3. A multi-level, multi-stakeholder approach, involving public and private partners.
4. A sound scientific background, evaluation and dissemination of the programme.

EPODE is a long-term programme and methodology embedded into the daily life of the family and its constraints. It is a positive, concrete and step-by-step learning process, in line with the related national recommendations. A wide range of local stakeholders is involved to build up a sustainable environment that facilitates the adoption of healthy behaviours (see Figure 1.1).
The EPODE methodology relies on the importance of political support, awareness, willingness and involvement to set up and implement EPODE initiatives. The importance of political representatives’ support for obesity prevention at their policy making level (national, regional or local) is key as they are best positioned to initiate and support cross-sectorial prevention dynamics in communities. The political representatives are well placed to encourage and build relationships with scientific experts, public and private partners (at national and local level) as well as with European and global political representatives to foster the set-up and implementation of further EPODE-type interventions.

Figure 1.1  Stakeholders in the EPODE programme

(Continued)
in other countries. The EPODE approach promotes the involvement of multiple stakeholders at a central level, from ministries, health groups and NGOs to private partners. The programme also benefits from the expertise and guidance of an independent expert committee. To put the EPODE methodology into practice, a central coordination team, using social marketing and organisational techniques, trains and coaches a local project manager appointed in each community by the mayor or another local leader able to champion the programme.

The social marketing based method

EPODE is a combined and coordinated approach with the application of marketing alongside other concepts and techniques to achieve specific behavioural goals to improve healthier habits and reduce health inequalities. Social marketing is incorporated into a wide range of strategies aimed at influencing the social and physical environments surrounding individuals. EPODE uses social marketing strategies to assist the development and delivery of a multi-level and multi-stakeholder approach to create the conditions to support families in their local environments. This approach aims to mobilise local stakeholders within their daily activity (teachers, local NGOs, catering services) to promote healthy lifestyles and greater physical activity in everyday life, empowering families and individuals in a sustainable way.

Impact

The pilot study of the first two towns to adopt EPODE, Fleurbaix Laventie Ville santé (FLVS), was initiated in 1992, aimed to understand the nutritional habits of children and their families and to study the effects of healthy nutritional information given in schools on the national habits of families. By taking a series of coordinated societal measures, it was possible to demonstrate the impact of EPODE on reducing obesity prevalence, improving children’s lifestyle and decreasing health inequalities.

Based on the lessons learned from this pilot study, the EPODE methodology was built and implemented in eight French pilot towns. In these towns, success to date is measured by a large field mobilisation. While recent data available in France at national level show an overall stabilisation in the prevalence of childhood overweight and obesity, results from the eight French EPODE pilot towns show a significant decrease of 9.86 per cent (p < 0.01; n= 23205 children) in overweight and obesity between 2005 and 2009. There are now similar projects in Belgium, Spain, the Netherlands, Greece, Ireland, Australia, Romania and the USA.

For more information see: www.epode-international-network.com/.
The organising potential of social marketing

Social marketing is the most comprehensive organising set of principles and concepts through which to strategically assess, design, deliver and evaluate social programmes that seek to influence behaviour for social good. Just like marketing in the for-profit sector, social marketing is a field of study that draws on theory, evidence and data from every discipline and then proceeds to synthesise all of this through systematic and transparent planning and implementation processes informed by principles that include value creation, exchange and relationship building, all of which are based on the sciences of behavioural influence and human interaction.

A new paradigm for social programme design is inevitable because we are now at a point in human history in many countries where a confluence of factors is occurring which means that existing approaches to social policy selection, design and application are no longer tenable. This situation has come about not just because of financial restrictions, emerging new evidence about what works, or because we know more about how behaviour can be influenced (Oliver, 2013), but also principally because there has been a fundamental power shift between states and the citizens they seek to govern and support (Clarke et al., 2007). This shift in power from small groups of powerful elites identifying and solving social problems to a more citizen empowered present has been brought about via a wide range of social, economic, scientific and technical developments.

These factors include but are not limited to the following:

- A realisation of the limitations of current social policy intervention approaches in a world of complex social problems, all of which have a large behavioural element together with a growing and accessible evidence base about what works and what does not (Australian Public Service Commission, 2007).
- The development of new understanding about how people make decisions and how their behaviour can be influenced (Dolan et al., 2010).
- A growing understanding of the key characteristics of effective social programmes and insight about how to select, test, develop, implement and evaluate social intervention programmes (Cabinet Office, 1999).

In addition, growing wealth and literacy levels and mass access to information and social networks are all serving to empower citizens. Although it varies considerably around the world, people generally trust governments, other civic institutions and professions much less than they used to and expect more from those in positions of authority. Clarke et al. (2007) have described the growth of the ‘consumer citizen’ as one of the key social phenomena of the last fifty years. As people become educated,
empowered by liberal democracies and their wealth increases they experience more power as citizen consumers. This expectation of choice and power is transferred into expectations about how government and other not-for-profit institutions should behave and function.

Given impetus by these factors, social marketing has slowly begun to influence the social policy agenda. It has been given momentum by the growing recognition among policy makers about the limitations of traditional forms of state action (Oliver, 2013; Shafir, 2013). What is needed now, due to the growth of citizen power and improved understanding about how to develop and deliver more effective social programmes, are approaches to social policy that reflect a more equal distribution of social power and responsibility and more citizen insight informed social policy and programmes.

What this means in practice is converting citizens from being passive recipients of social programmes in systems that deny them both power and responsibility to being active co-creators of their own, and societal wellbeing.

In relation to environmental action it means engaging and enabling citizens to act in a sustainable way by creating policy, systems and services that encourage and reward positive environmental behaviour and not just nagging people to act. In the field of health it means empowering patients and care givers so that they can take a more active role in managing how healthcare services are provided and more joint decision making about treatment and care options. What we are now witnessing in many countries is the emergence of a new relationship between the state and citizens in which doing things ‘with people’ rather than ‘to them’ becomes a key factor in effective, efficient and acceptable social policy delivery. Such an approach is characterised by a relationship built on listening, dialogue and engagement. This respectful relationship building and solution generation process, if adopted, will result in interventions that apply the best available insights about citizen behaviour and their motivations, together with evidence about what works to develop social programmes that are effective and efficient and also valued by citizens and result in valued social benefit.

Such a change reflects citizen’s expectations and acknowledges that citizens are more informed and inquiring. This emerging new paradigm signals a break from a situation where governing elites ruled and the ruled were grateful, and experts told people what to think and do and they did it. It also reflects modern conceptions of marketing practice that emphasise relationship building (Gummesson, 2002; Finne and Grönroos, 2009), and the dominance of quality service delivery (Lusch and Vargo, 2009) rather than just a focus on products or services.

Social marketing is a set of core organising principles, concepts and techniques that can be used to develop effective, efficient and citizen responsive social programme design. As Andreasen (2012) has argued we are potentially at a point in history where marketing comes to be seen as a field of application that is as dominant in the social sector as it is in the for-profit sector.
All societies face a number of significant social, health, economic and cultural challenges over the coming years. These include but are not limited to: massive growth in the burden of chronic disease, the consequences of global warming, environmental scarcities such as water and food, intolerance and discrimination, social service uptake and economic inequality. In addition most governments around the world are experiencing growth in social, welfare and healthcare spending as a percentage of GDP that will be difficult to sustain in the face of increasing demand. To tackle each of these problems governments and other civic institutions need to influence people’s attitudes, beliefs and behaviours. However, many social change programmes have limited impact on these issues due to a number of systemic weaknesses in their conceptualisation, planning, implementation and evaluation:

1. Many social programmes that aim to change behaviour are constructed by policy makers, and then attempts are made to drive them through delivery agencies and professionals down into communities. This ‘top down’ and ‘expert led’ approach is often not informed by in-depth target audience understanding or insight. The frequent result is that interventions are misunderstood or viewed as irrelevant by the people who they are intended to help and end up having little impact.

2. Many behaviour change programmes are developed by politicians or experts as a means of demonstrating activity or concern around an issue high on the political or media agenda. Projects often have a ‘short shelf life’ and few interventions are sustained for a sufficient length of time to either develop effective interventions or have a sustained population level impact. Short-term awareness raising campaigns are often selected as a default response driven by a need for organisations or governments to demonstrate activity or manage political agendas rather than promoting real change. In addition many programmes are insufficiently funded to achieve their desired outcomes.

3. Many programmes either have vague, unquantifiable aims or at the other extreme have unrealistic goals. Many are also not adequately performance managed and lack clear performance metrics. Activity is focused around developing interventions, information or products such as social advertising, toolkits, training programmes, web services or the distribution of products. This focus on ‘activity’ and ‘product’ output results in programmes that are often not guided by insight data or theory, and also often do not have sufficient stakeholder engagement to enable sustainability.

4. There is often a lack of coordination and integration between programmes. This results in the development of competing interventions that provide contradictory advice and competing incentives or disincentives. Few programmes utilise a full intervention mix of education, information provision, design, support services and control measures.
5. Many programmes fail to take account of the complexity of causation of problems and the need for interdisciplinarity, and multiple interventions to tackle the determinants of social problems. Too often interventions depend on single or simplistic intervention strategies despite evidence that sustained interventions that simultaneously seek to influence several variables are more likely to be successful.

We also know that in many circumstances solutions to social problems such as obesity and global warming will not flow from untrammelled free markets or the unrestricted marketing of goods and services that produce net harm to citizens. In Chapter 14 we explore the issue of critical marketing, which we believe to be a key element in the strategic social marketing process.

The final driver for change comes in the form of economic imperatives. Many governments, as well as struggling with difficult economic circumstances, are under increasing pressure due to a demand for more transparent government to demonstrate value for money (VFM) and return on investment (ROI) from social programmes (Cabinet Office, 2009). The need to demonstrate that funding is having a positive effect and that money is being spent wisely is a positive and increasingly common situation.

These significant common programme and policy weaknesses can sometimes seem both complex and intractable. However, while these issues are complex the solutions are not always complicated. There is a growing body of evidence and many examples of good practice, some of which are captured as case studies in this book, which demonstrate that well planned and executed behaviour change programmes, based on social marketing principles and planning, can be highly effective in reducing the impact of current and future social challenges.

Taken together these factors result in the need for an approach to social policy development and implementation that is built on:

• a commitment to engagement and building value for citizens
• a deep understanding of citizens’ beliefs and motivations
• an understanding of how to influence behaviour, social and cultural structures, and systems
• systematic planning and evaluation methodologies.

How we can embed these imperatives into the social policy and strategy development process and how marketing can assist with this process are explored in Chapters 2, 3 and 13.

**Out of the shadows and into the policy spotlight**

Social marketing is becoming an integral part of all public policy making and social programme design. However, to fully realise its potential as a force for social change it should not be viewed as an adjunct to social policy.
Social marketing’s biggest contribution lies not simply in persuading people to behave in socially beneficial ways but by helping empower them to do so and enlisting their energy and support to promote and sustain socially beneficial behaviour in others. Improving health, reducing crime, promoting economic and social renewal cannot happen if society has to choose between either having an active state or having active citizens, as it requires both.

Social marketing began in the 1960s as a process (French, 2014) for ensuring that government and NGO campaigns were aimed at encouraging more people in both developed and developing communities to take up preventive health products and services such as increasing vaccination, the use of oral rehydration and contraception. Social marketing has subsequently developed into evidence and insight based approaches to social programme design focused on influencing behaviour. Social marketing has also developed into a philosophy of practice grounded in the belief that attempts to influence social behaviour should be built on ethical principles and a deep understanding of citizens’ circumstances, needs, wants and beliefs. A core feature of social marketing is a commitment to a process that seeks to engage citizens and all relevant stakeholders in developing solutions to social challenges that are valued and are subject to broad civic support.

Social marketing is now supported by a number of policy makers, practitioners, specialist companies and academics, all of whom are focused on demonstrating its effectiveness and refining what we know about what works in influencing behaviour for social good. A small but growing number of governments and international agencies focused on solving the world’s big social, economic, environmental, health and civil justice problems have now recognised the potency of social marketing in influencing positive civic and personal behaviour. Examples of these developments are explored in this book.

**Conclusion**

Social marketing, like every other field of study, progresses through a process of exploration, review, challenge and refinement. In this book we set out some challenges to the view that social marketing should only be considered when it comes to programme delivery. It is our hope that this book makes a helpful contribution to the field of social marketing by setting out an expanded view of its potential contribution to the selection, design, implementation and evaluation of social policy and strategy as well as its contribution to specific intervention programme design and delivery. Positioning social marketing as an integral part of the policy and strategic development process rather than just an element of operational planning and tactical delivery will, we hope, both raise the status of social marketing but more importantly improve the effectiveness and efficacy of social programmes designed to influence positive social behaviour.
By positioning the contribution that social marketing can make across the spectrum from policy development through to tactical project delivery we hope that this book will act as a helpful guide to practitioners and policy makers, as well as students, scholars and researchers.

Reflective questions

1. What are some of the main social and economic factors that are encouraging organisations and governments to incorporate social marketing into their social policy and programme development strategy?
2. What are some of the key weaknesses associated with current social policy and strategy aimed at influencing behaviour?
3. What added value can social marketing bring to social policy selection and the strategy development process?

Further reading


References

THE IMPORTANCE OF SOCIAL MARKETING


