



## Journal of Social Marketing

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#### Article information:

To cite this document: R. Craig Lefebvre, (2012), "Transformative social marketing: co-creating the social marketing discipline and brand", Journal of Social Marketing, Vol. 2 Iss: 2 pp. 118 - 129

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# Transformative social marketing: co-creating the social marketing discipline and brand

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## Abstract

**Purpose** – The purpose of this paper is to explore the field of social marketing. The field needs to evaluate what works, and more importantly for it to prosper and remain relevant, it must discover and incorporate concepts and techniques from other disciplines that are aligned around core ideas of people-centered and socially oriented.

**Design/methodology/approach** – The paper reviews new insights and understandings from modern social marketing practice, social innovation, design thinking and service design, social media, transformative consumer research, marketing theory and advertising practice and develops a model for transforming social marketing thought, research and practice.

**Findings** – A three dimensional model is presented that includes: scope – co-creation, conversations, communities and markets; design – honoring people, radiating value, engaging service and enhancing experiences; value space – dignity, hope, love and trust.

**Originality/value** – The presentation weaves together a set of ideas from different disciplines that together strengthen the social marketing approach and provide a broader set of outcomes and perspectives that can be incorporated into work in this field.

**Keywords** Design thinking, Markets, Service-dominant logic, Social innovation, Total market approach, Transformative consumer research, Consumer research, Social marketing

**Paper type** Conceptual paper

This paper is based on three propositions:

- P1.* All social marketing stakeholders have a part to play in the evolution of social marketing regardless of their educational background or career niche.
- P2.* The theory and empirical basis for our work has become mired in old ways of thinking about marketing and social change and needs to be updated.
- P3.* The practice of social marketing should both drive and reflect new marketing and social change ideas and the transdisciplinary nature of our work.

We explore how these propositions lead to new ways to conceptualize the social marketing model and discipline.

Since the first publications that described the social marketing approach (Lefebvre and Flora, 1988), our core ideas about it including audience segmentation, formative research, the marketing mix and a people-centered approach have remained unchanged. Yes, there has been more discussion around ideas of competition (Donovan and Henley, 2010), critical marketing (Gordon, 2011; Hastings, 2007), ethics (Brenkert, 2002) and social media (Lefebvre, 2007), but when we review the major textbooks in the field



we find an echo chamber of almost the same chapter headings and content. Such homogeneity in perspectives of what constitutes social marketing might signal to some a maturation and consolidation of the field. However, when we look beyond social marketing we find the world is changing all around us, especially the world of marketing; most of the thought, research and practice of social marketing is not. What was once thought of as a dynamic field interested in applying marketing to solve social problems has become captive of a routinized process to create programs. In moving to a primary role of technical performance of program planning (with benchmarks to judge whether we have done it “correctly”), “we have lost the soul of social marketing” – and to rediscover and free that soul which was about serving people and making a dent in social problems is going to take all of us thinking a little harder about what we are doing here.

Sankofa is an idea used by the Akan people of Ghana of taking from the past what is good and bringing it into the present in order to make positive progress through the benevolent use of knowledge. What we are suggesting is not that all we know about social marketing, or how we practice it, is necessarily wrong. Rather, as Sankofa suggests, we should take those pieces that have proven themselves useful in both research and practice and add to them current knowledge from related fields in order to make positive progress in how we use marketing for social change. We do not need to continue to be burdened and held to account for “what is social marketing” just because people continue to repeat them (see Donovan, 2011 for some examples of these “mythunderstandings”). Among the fields that are offer fresh ideas and inspiration for social marketers include transformative consumer research (Mick, 2006), design thinking and service design (Brown, 2009; Miettinen and Koivisto, 2009), service-dominant logic in the marketing literature (Vargo and Lusch, 2004), the use of social and mobile technologies to influence behavior and social change (Lefebvre, 2007, 2009), and a shift to a perspective on public health and social issues that are more rooted in social networks and social determinants of behavior and cultural change rather than individual or psychological ones (Lefebvre, 2011b).

### **Defining social marketing**

There are a variety of definitions of social marketing that represent different points of view and emphasize other elements of social marketing than the “change individual behavior for social good” theme. Here, are three particularly good examples:

- (1) Harnessing the power of markets and marketing to improve well-being and save lives.
- (2) Ensure fair allocation and access to the means of maximizing well-being.
- (3) Develop and enhance marketing systems that support consumer well-being.

What is intriguing is that none of these definitions mention individuals, behaviors, exchanges, marketing mixes or even social good. What they all share is a focus on markets and marketing systems. And therein lies a clue to our future. It is the answer to the question: what space do we operate in? Some commentators want to say social marketing operates in the marketing space [...] or public health [...] health communication [...] or the environment [...] transportation [...] financial or math and science literacy. Others argue that it is the behavior change space. Some want to say it is the social change space. To a greater or lesser extent, I think each of these positions demonstrates a form of marketing myopia (Levitt, 1960). That is, if we focused on what

our customers or users of social marketing want, rather than what we as social marketers produce (i.e. programs to change behaviors), we might be rewarded with some new answers.

What we propose is a conceptualization and definition of social marketing that continues our commitment to making positive social progress, carries forward useful heuristics of what works, and adds to it changes in our understanding of what we do: social marketing is a planned approach to social innovation. That is, “social marketing is the application of marketing principles to shape markets that are more effective, efficient, sustainable and just in advancing people’s well-being and social welfare” (Phils *et al.*, 2008).

This definition reinforces the point that social marketing is the application of marketing principles to improve people’s well-being and social welfare. Our emphasis on these end-points, rather than behavior change, expands the value propositions we can offer to society – we are more than behavior change technicians. We offer innovation in solving complex social problems that may involve, but not be limited to, behavior change. Our approach can involve the refinement or development of new products and services. But more importantly, we offer a marketplace perspective for how inefficiencies can be addressed and how the dynamics can be shifted to better serve the needs of individuals and society through the application of marketing principles and not just psychological theories of change. This definition also sets the bar for our success as demonstrating greater (or comparable) effectiveness, at better efficiencies, are developed with sustainability as an important outcome and reduce (or at a minimum do not contribute to broadening) inequities in health or social status.

In collaboration with Jeff French, we operationalize this definition for social marketing practitioners as:

Social marketing develops and applies marketing concepts and techniques to create value for individuals and society. This is done through the integration of research, evidence-based practice and the use of social-behavioural theory together with the insights from individuals, influencers and stakeholders. These inputs and perspectives are used to design more effective, efficient, sustainable and equitable approaches to enhance social well-being. The approach is one that encompasses all the processes and outcomes that influence and are associated with change among: individuals, organizations, social networks and social norms, communities, businesses, markets, and public policy.

In the following sections, I present a model for transformative social marketing that preserves marketing principles and approaches that have demonstrated their utility in research and practice. I then bring into play concepts and principles from related disciplines to develop a vision for a more expansive social marketing approach that can be applied to facilitating innovation to address social issues and enhancing social progress in the coming years.

### **Markets and social marketing**

As the idea of markets may be new to some social marketers, I will explore the idea in more detail. A traditional view of a market is any arrangement in which some people offer goods or services and others buy them (either for money, barter or some other method of exchange). For example, there is a market for shoes and clothes. There are markets for food, construction supplies, housing permits, legal services and information. I (and others) suggest there are markets for behaviors and ideas. Indeed, intellectual

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property rights exist as a way of protecting information and knowledge in the markets of ideas (Ramello, 2005). And though “markets of behaviors” is not a typical way to think about what we do, in fact people are making choices about the behaviors they engage in through being exposed to various types of models and experiences (Bandura, 1986).

The notion of markets as places in which exchanges of products and services take place is also shifting as marketing scholars suggest giving up the sacred cow of exchange theory as a seller-buyer model and the sacred script of the 4Ps. This changing view of markets and exchanges is rooted in a customer, rather than producer, perspective – a service-dominant (S-D) logic (Merz *et al.*, 2009; Vargo and Lusch, 2004). This S-D perspective views skills and knowledge (behaviors and ideas), rather than products, as the fundamental unit of exchange. What marketers offer are value propositions that must be discovered and validated (or not) as they are used by people. In this S-D logic framework, a hammer is not a product but a way of providing a service to people who find value in hanging pictures on their walls or building things for example. They could as easily, but for more money, have someone hang pictures or build things for them – or purchase they already built. That is, the service would be different but achieve similar results with similar value for the individual purchaser. From this perspective, I suggest that the focus of social marketing becomes one of facilitating and supporting a process of co-creation of value in which people are seen as co-producers or collaborators in adopting new behaviors or quitting other ones rather than targets we attempt to exchange with. They need to discover for themselves what the actual value for them is in changing what they do – we can only propose some possibilities (hopefully based on an in-depth understanding of what they do value and attempting to link our offerings to them). This viewpoint involves a much more participatory and dynamic learning process for both people we serve and social marketers. Indeed, to judge successful social marketing programs we must assess how we – the implementers, sponsors and partners of social marketing programs – change, not just the people we call audiences.

A marketing system supports the ability of markets to function and for participants to co-create value for each other. Markets need a range of other players to support the principal actors who are involved in a co-creation process (what others might term a “social ecology”). These supporting players include the private, nonprofit, civil and government sectors of society as well as the formal membership organizations and informal networks that bind them together. In a marketing system, all players choose to participate – or not. Suggesting that a problem, or a solution, is the responsibility of one sector or another is to ignore the dynamic interrelationships that exist in the system. To develop intrasectoral and cross-sectoral partnerships, therefore, is an inherent part of shaping and adapting marketing systems to new ways of relating to each other as well as supporting and facilitating exchanges of skills and knowledge through structural changes. This means that social marketers must not only seek to provide value to people we might call beneficiaries or customers, but also to other organizations in this networked system of ideas and behaviors (Lusch *et al.*, 2010). As one example, in working to solve the puzzle of the increase in childhood obesity, programs that only focus on changing individuals will provide an incomplete solution; there needs to be integrated attention given to supporting, or countering, the influences of other market actors including families and social networks, the work of nonprofit groups with similar

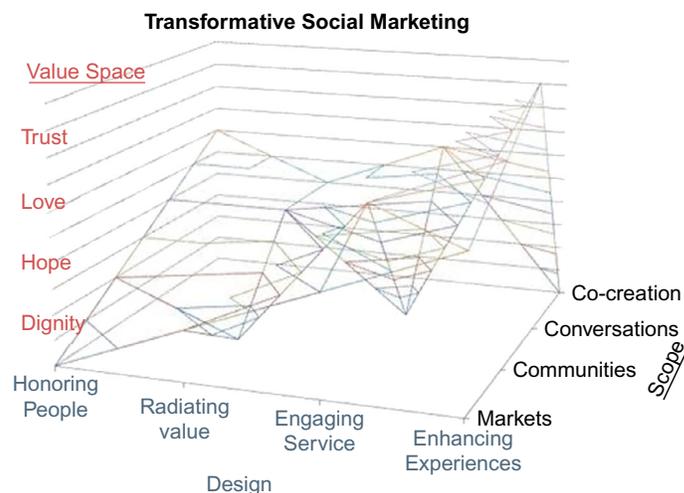
objectives, food manufacturers, recreational and physical activity service providers, school systems and policy-shapers and makers.

Understanding the context of our work as occurring within a larger marketing system leads us to take a total market approach (TMA) as we identify the possible ways to solve the puzzles of public health, the environment and other social issues (Lefebvre, 2008; Meadley *et al.*, 2003). Lefebvre (2011a) describes TMA as an approach that attempts to coordinate interventions that may work across the public, NGO or private sector. TMA uses communications, regulatory, financing or other strategies to influence behavior directly or indirectly by changes in product and service offerings and/or opportunities to engage in healthier behaviors.

Thinking of our work in the context of marketing systems, and using approaches such as TMA, means working with the private sector. And to those who argue that we should not engage with private companies and thus ignore a large portion of the marketing system, we suggest that one cannot change the world without changing business. Social marketers need to look beyond a focus on individuals to all of the actors in the marketing system or marketplace that determine who has access to what resources – at what costs and when.

### Transformative social marketing

How do we move out of the social marketing box we have placed ourselves in for so long? I suggest it is by first moving towards creating more permeable walls with disciplines that share our motives, values, interests and approach. An openness to new ideas will also occur as we embrace the transdisciplinary nature of marketing and the wicked problems we often tackle. And it also means thinking about what we do in new ways. We offer the three-dimensional cube in Figure 1 to convey some structure to what we do and also acknowledge its complexity. The model incorporates a number of ideas and perspectives from the work we have previously noted. We chose the term “transformative” to indicate a break from the past and a focus on changes in social systems (including marketplaces).



**Figure 1.**  
A model for  
transformative social  
marketing

*Scope*

On the deep axis lies the scope of what we do. We need to surrender the idea that we are in the individual behavior change business. The scope dimension codifies the notion that there are many contexts in which to apply social marketing, and that they all do not have to resort to a reductionistic apology that “in the end, it all involves individual behavior change”. As Watts (2011) has noted, this micro-macro gap between individual-level explanations of change and change at higher levels of social organization requires other theories and targets for change. Rather, we need to refocus on marketing programs as an exchange, and at the heart of that exchange is value co-creation. If we are not learning something from the people we serve and gaining value from working with them, then we are not doing social marketing; we should not be delighted by aiming persuasive messages at audiences or manipulating environments to guide people towards doing certain behaviors and not doing others (whether it be a nudge, a physical change in the environment or a policy; French, 2011). Co-creation also recognizes that our focus should not just be about people we might call customers or participants, but also stakeholders and partners (people critical to success) with whom we must also actively engage with in developing customized, competitively compelling value propositions.

The other levels of the scope dimension reflect three more levels of the social marketing approach: creating conversations, working in the context of communities and at its broadest level, focusing on changing the marketplace. As Doc Searls said over ten years ago in *The Cluetrain Manifesto* (Searls and Weinberger, 2009), markets are conversations – that’s what should make social media interesting to social marketers. Social media are not simply new communication tools; they embody a fundamental shift in the dynamics of conversations enabled by new technologies that facilitate access to exchanges in which value can be created. As Searls and Weinberger (2009, p. 151) note: “There is no demand for messages”. Rather, how can we use conversations to influence communities and marketplaces? How do we participate in these conversations to create social value or achieve social goals? These conversations are occurring everyday in the commercial world of products and services, but as the events in North Africa and the Middle East have demonstrated social media are helping to shift political marketplaces of ideas and behaviors as well.

Markets are also relationships, and we need to embrace relationship marketing more strongly in our efforts (Hastings, 2003). If we are creating exchanges with people and co-creating value for each other, we are setting the foundation for relationships. Indeed, the two mutually support one another. If we continue to aim programs at targets who passively accept or fend off our messages and programs, we are missing our greatest opportunities and are neglecting the fundamental premise of a marketing approach.

Relationships form networks and networks form communities – which can be defined in many different ways, not just as political entities. Communities provide the context to bring social marketing to scale utilizing co-creation, conversations within and across networks and by changing local market conditions.

Markets – whether they be local, regional, national or global – are the great frontier for social marketers, though we will certainly not be the first to tackle them. Social activists, social entrepreneurs and corporations are deeply involved in changing markets whether it be through social action, regulation, or leveraging and realigning market forces of supply and demand to name just a few strategies. To foster sustainable changes that support people’s health and social well-being we must acknowledge

and engage with the marketplaces of ideas and practices that are part of our social world no matter where we live. We need to shift our marketing thinking so that we elicit the same types of responses as was reported by Doc Searls about a friend's response to *The Cluetrain Manifesto*: "you guys defected from marketing and sided with markets against marketing". What he meant was that the new models of marketing as conversations were no longer about the "power" of marketing strategies and tactics, but the power of the marketplace – consumers and communities who by their actions can now dominate and dictate to brands (Ahonen and Moore, 2005). To say social marketers are customer-centered should translate into actions that seek to alter the conditions of the markets in which they live, work and play rather than trying to adjust people to their current living conditions. One example of making this shift is illustrated by the definition of "at-risk" populations offered by Pechmann *et al.* (2011):

[We define] at-risk consumers as marketplace participants who, because of historical or personal circumstances or disabilities, may be harmed by marketers' practices or may be unable or unwilling to take full advantage of marketplace opportunities.

Adopting such a perspective on "at-risk" populations allows marketers to analyze and address social issues and inequities as market-based problems or inefficiencies. Social marketers then need to approach markets with tools that mobilize citizen participation and demand. These mobilization tools can lead to engagement with, and improvement of, the mechanisms of supply – whether those tools are incentives, more efficient and just distributions systems, or social and mobile technologies.

### *Design*

Along the horizontal axis are four key features of how social marketing programs might be designed, and we see the areas of design thinking and service design as sources to inform how we develop our approach and perspective towards solving social problems (Brown, 2009; Miettinen and Koivisto, 2009). The first feature is honoring people – not just focused or centered on them. The idea of "Honor" demands from us to have empathy and insight into people's view of the puzzles we choose to solve together and how their possible solutions provide value and relevance to their needs, problems and dreams. Honor is a more complex issue than just "respect". Consumer researchers have written about the tensions that underlie honoring "at-risk consumers". Should they be thought of as having a vulnerability or strengths? Should we be encouraging radical versus marginal change in their lives and marketplaces with our offerings and value propositions? Should targeting them or non-targeting be advocated? How and who decides the relative costs and benefits of knowledge versus naiveté about risk related to certain behaviors or situations? What is the relative value of inclusion versus exclusion of certain groups of people in social marketing programs (Pechmann *et al.*, 2011). Each of these tensions goes to how we are Honoring people – it is by no means an easy set of issues to balance, and different groups of people and circumstances may lead to divergent answers and opinions. My point is that we need to be asking ourselves these types of questions, and not just become like a surgeon who walks into an operating room and starts a procedure without even knowing the patient's name. Then we can decide whether we are creating products, designing services, assisting people in learning new behaviors or adopting new ideas. Those decisions should be the outcome of our conversations with people, not the excuse to start them in the first place.

Radiating value builds on the notion of exchange as co-creating value. It is not about creating value “for them,” but creating value for us as WE define and experience it. And WE is an inclusive term that can include many actors in the marketing system who contribute to defining and creating (or destroying) value including stakeholders, partners, communities – and yes, businesses (Frow and Payne, 2011). Value needs to be defined and measured from multiple points of view, not just from a paternalistic or producer one. Radiate gets to this inclusive dynamic more forcefully and visually than words like “create” or “build” value do.

The third element of the design dimension is engaging service, which is anchored in the ideas of service design and S-D logic where all exchanges are services – active participation in relational exchanges that are useful, usable and desirable from the user’s point-of-view (POV) and effective, efficient and distinctive from the supplier’s POV. In social marketing, providing people with information, products or tangible services is not the point; the question is how this information, these products and services can be used by individuals to add value to their own lives – whether it be meeting basic living needs, solving or preventing problems or moving them closer to their dreams for themselves, their families and/or others.

Enhancing experiences is the promotional element of the marketing mix re-imagined as contributing to a sense of overall well-being. It is the antithesis of talking at or telling stories to people. The experience becomes people engaged and connected with us, each other, organizations, communities and their lives in ways that are meaningful to them and allow for the learning and acquisition of behaviors that improve health, living conditions, the environment and society-at-large. The depth and richness of this experience emerges as much from the marketplace and the physical environment people find themselves in as it does in the communication or promotion tools we use to engage with them on their terms. Perhaps, shifting to an experience base to judge program development will remove some of the artificial boundaries that are introduced when marketers debate the relative merits of communication vs structural or policy change. How any program element improves people’s daily lives, or experiences, might be the more insightful question to be asking.

#### *Value space*

The third dimension of the cube, the vertical axis, displays four value spaces that I also think are integral to social marketing programs. They are:

*Dignity.* Phil Harvey, the founder of Population Services International and a believer in the “social marketing is the subsidized sales and distribution of commodities to prevent diseases” model, based this “sales” premise on his reaction to giving away for free needed supplies to thankful poor people: “I would never be comfortable providing help to people in ways that suggested they should express gratitude [. . .] I found such relationships demeaning, and yes, immoral” (Harvey, 1999, p. 18). We need at all times to respect people’s dignity and the choices they make; otherwise we fail to both honor them and have relationships with them for value creation.

*Hope.* Hope is believing in future possibilities. Our commitment should be to bring these possibilities into view in a compelling, accessible and relevant way. One of the guiding principles of design thinking that we need to imbue our social marketing with is the notion we should be “making hope visible”. The idea of abductive thinking (Martin, 2009), visualizing the future before creating an intervention, is remarkably

absent in many of our projects. Yes, people may be able to offer ideas about the future in terms of numerical objectives or “a healthy world for all”. But I find that being able to explicitly map out the future with our co-creators as it would affect their daily lives is perhaps the most important ingredient to motivate and engage all types of people in social change.

*Love.* Donald Calne (1999) has said that the essential difference between emotion and reason is that emotion leads to action while reason leads to conclusions. Love is among the most powerful and positive of emotions. It may be illuminating for some to consider why “fear”-based messages dominate conversations and conferences of social marketers while words such as “love” and “hope” are conspicuously absent. This most powerful of emotional connections needs to be tapped by us to create “lovemarks” (Roberts (2005), CEO of Saatchi and Saatchi calls them) – the next evolution in brands, whether they be for products, services or behaviors. How do we understand and then engage people in behavior and social change out of love, not fear, and certainly not out of a rational weighing of pros and cons? We might begin by devoting ourselves to creating deeper relationships with the people we serve and understanding what they love in their lives. Maybe then we could move towards designing healthier and more socially beneficial behaviors that are sustainable over the long-term.

*Trust.* Trust is a larger idea than just a variable of interpersonal relationships or a characteristic of sources of messages. It also extends to organizations and companies that support and sponsor social marketing activities. Richard Edelman (2011) talks about a “trust triangle” that is based on the expectation for companies to act collaboratively to benefit society and not just shareholders. He says companies (and I would add NGOs and government agencies) must be transparent about their operations and profit engines and engage with people. We live in a world where trust is no longer a commodity that is acquired, but rather a value that we receive from the people we serve and our stakeholders. Without trust, social marketing risks slipping into coercion, liberal paternalism, propaganda and irrelevancy. Trust also underlies important concepts including social capital formation as well as the development of effective partnerships.

### **Patterns of change**

The wavy lines in the middle of the cube represent the outcomes of social marketing programs. Their configuration is meant to suggest that patterns of change are what we should expect from and measure in social marketing programs. We should not limit ourselves to single indicators such as changes in rates of behavior, or to other individual-level indicators such as changes in awareness, knowledge, physiological measures or morbidity and mortality. Rather, the patterns of change we should assess include changes in well-being, social determinants, social networks and relationships, community indicators, and policies; changes in organizational relationships and the physical environment; and changes among groups of people we serve including their overall sense of well-being, social capital, collective efficacy and equity (are we reducing disparities in health and access to health products and services). Our assessment of social marketing programs also has to measure how “we” change – whether that change is in our understanding of people we serve, the relationships we have with them and the larger community, our relationships with partners and stakeholders, or our procedures and policies. The idea of “patterns” is to shift us from

thinking linearly about finding the ideal one “right solution” to a problem, and to think more about how our offerings move us closer to solving the complex puzzles we are challenged by in our work.

### Conclusion

The transformative social marketing model is a starting position for how to begin to operationalize our aspirations for social marketing. This paper is a rough draft to which I hope many of you will think about, engage with, try out and talk about with your colleagues. It is my attempt to start turning 10 what-ifs of social marketing (Lefebvre, 2011c) into action: what if:

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- we are co-creators of value;
- create places where people can play;
- design research to fit the puzzle and people;
- seek empathy and insight into people’s motivation and values;
- first assume that something might be wrong in people’s environment (or the marketplace);
- focus on creating exchanges with people and stakeholders;
- measure how, when and how often we touched people in a variety of ways (both intended and unintended);
- serve people;
- offer people new ways to solve problems, meet their needs and reach for their dreams; and
- make sustainability as important as evaluation.

And, if we are successful in transforming ourselves and what we do in applying marketing to social issues, we can bring new light to what life might be.

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