1 Social marketing and social change

Social marketing is just one 'branch' of marketing, where the branches reflect the area of application: for example, sports marketing; business to business or industrial marketing; not-for-profit marketing; religious marketing; political marketing and so on. However, social marketing is more than just the application of marketing to social *issues*: the key point of difference to all other branches of marketing, is that the social marketer's goals relate to the wellbeing of the *community*, whereas for all others, the marketer's goals relate to the wellbeing of the marketer (sales and profits, members and donations, political representation, etc.). If the wellbeing of the community is not the goal, then it isn't social marketing.

Social marketing is concerned with helping to achieve and maintain desirable social change. Sometimes social change occurs unplanned, and with generally benign or even positive effects, such as in the introduction of the printing press, the telephone, or the worldwide web. In other cases, change can be violent as in the French and Russian revolutions of the eighteenth and twentieth centuries, respectively, or have devastating health effects as in the industrial revolution's underground mining and unsafe factories. More recently, social and economic changes in countries previously constituting the Soviet Union have led to a marked increase in heart disease in these countries, especially among the unemployed and underemployed, with alcohol abuse being the major proximal contributor to deaths (Zaridze *et al*. 2009a, 2009b). Hence, social marketers and other social change practitioners are called on to use their skills not only to achieve socially *desirable* change, but also to *counter undesirable* social change.

Social marketing is best viewed within a broad context of social change

We would argue that the value of social marketing is that it is the one discipline to embody, within the one framework, most of the principles, concepts and tools necessary for the development and implementation of effective social change campaigns.

While ideological and religious causes are still catalysts for social change in many parts of the globe, most social change is occurring as a result of changes in technology – with implications not only for the developed countries where these changes originated, but also for developing countries where they are often applied.

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Changes in communication technology lead to cultural intrusions, usually US-based, and to names like McDonald's, Paris Hilton and Nike being known in even the most remote parts of the globe, and particularly among the young. Changes in industrial technology lead to unemployment or redeployment, with subsequent social upheaval.

Technological changes have consequences for health, such as the marked decline in physical activity as a result of labour-saving devices in the home and workplace, and the advent of computer-driven home entertainment systems. As our colleague Garry Egger has said, 'It's not just Ronald McDonald who's causing the current obesity epidemic in developed countries, it's also Bill Gates!'

Social change practitioners are involved in a wide variety of areas, from changing practices and cultures within corporations, government bureaucracies and institutions, to achieving change within local communities and broader state and national groupings. For example, environmentalists such as Greenpeace are seeking to change the way people treat the environment; public health professionals are attempting to change the way politicians view preventive health versus medical 'cures'; progressive educationists are attempting to change the way teachers view learning and conduct their classes; and organisational psychologists are attempting to change the way workers react to changing technology and work practices. In this book we will argue that social marketing has much to contribute to all these areas, and that social change practitioners in these areas can assist social marketers in developing comprehensive social marketing campaigns.

According to Ross and Mico (1980), social change can be brought about through any or all of several different methods. These vary from passive to active acceptance by the community, for example:

- the diffusion of ideas, products and services throughout society, often led by opinion leaders and mass media;
- consensus organising by interested parties;
- planned or political action – such as lobbying, legislation and election campaigns;
- confrontational methods via threats of reactive action if agreement is not reached;
- non-violent disruptive protests (e.g., boycotts, strikes); and
- violent disruption through riots and revolution.

Social marketing has a major contribution in understanding and facilitating social change in all the non-confrontational methods noted above, but particularly in facilitating diffusion and adoption.

Marketing and business

Just as business in general relies on marketing tools to attract (and satisfy) customers, so too does the business of social change. While no business relies solely on marketing (i.e., finance, production, transport and warehousing, etc., are essential), without

marketing of some sort the company could not survive. No matter how good a product is, if consumers are not made aware of how it could meet their needs, and if it is not readily available and affordable, the company will fail. In short, marketing is a necessary, but not sufficient, factor for success.

All other things being equal (e.g., costs of production and distribution, etc.), the most successful businesses are those with the best marketing. By 'best marketing', we don't just mean the best ads or high incentive promotions, but the best use of techniques to: identify consumer needs; develop products and services tailored to deliver benefits that satisfy the needs of different market segments; reach and attract the attention of the target audience and make access to the products and services easy, at prices that customers consider equitable.

Like any other business, the business of social change relies on the use of marketing tools to achieve its goals of attracting and satisfying its target groups. No matter how intrinsically good is our product, say energy conservation, we still need to do the following effectively to get people to 'buy' and act on our message:

- inform people as to *why* energy conservation is necessary;
- show them *how* they can buy products or adopt behaviours that conserve energy *without* undue cost or effort;
- *demonstrate* how energy conserving behaviours meet individual and community *needs*; and
- in a way that *attracts* and holds their *interest*.

Similarly, we need to do the same for legislators and corporations if we want to achieve regulatory, policy and product changes that provide support for individual behaviour change.

What is marketing?

Marketing has been variously defined. The American Marketing Association's (AMA) current definition (October 2007) is very broad: 'Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.' The AMA's previous definition is more concrete: 'Marketing is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organisational goals.' It is noteworthy that 'ideas' was included in 1985.

For many people, 'marketing' is simply the tactics used by companies to sell their products and services; that is, the first half of the AMA's previous definition – 'the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods and services'. However, the second half of this definition – 'to create exchanges that satisfy individual and organisational goals' – is the essence of

marketing and the basis for what has been called the 'marketing concept' or 'marketing philosophy' approach to doing business. The key words here refer to 'satisfying exchanges' – for both the buyer (the benefits derived from the product or service meet the customer's needs) and the seller (at a price that meets costs and returns a profit).

The marketing concept proposes that company profits are gained via the identification and satisfaction of consumer needs. This emphasis, known as a 'consumer orientation', is on maximising consumer satisfaction, with resultant repeat purchasing and favourable word-of-mouth contributing to the company's ongoing success. The orientation is long term and aims to establish an ongoing relationship with the customer. In this sense, marketing is distinguished from the 'selling orientation', where the emphasis is on the short-term goal of making the sale, regardless of whether the item is best suited to meet the customer's needs. The quote attributed to Henry Ford is often cited as demonstrating the selling orientation ('They can have any colour they want so long as it's black'), as are the tactics of time-share and door-to-door encyclopaedia salespeople. Other orientations contrasted with marketing's customer orientation are the 'product' and 'production' orientations. The former focuses on developing the best possible product – with little attention paid to whether customers want or can afford such a product; the latter focuses on obtaining the most cost-efficient production, packaging and distribution processes – with scant regard for how this might affect the consumer. Obviously, excluding monopoly or cartel situations, commercial organisations that do not place sufficient emphasis on a consumer orientation will fail in the long run. We will have more to say on a consumer orientation in Chapter 2.

Defining social marketing

Social marketing was originally named – as were other sub-branches of marketing such as business-to-business or industrial marketing – to refer to a specific sub-area of marketing. In practice, what occurred was that modern marketing techniques developed for consumer products began to be applied by other areas of business as they saw the apparent success of these techniques. These sub-disciplines were demarcated because, although the principles and tools of marketing could be applied in the different areas, the 'marketplaces' were very different for each. Marketers in these areas required an understanding of these marketplaces in addition to their understanding of marketing *per se*. Hence, we now have texts and courses entitled industrial or business-to-business marketing, services marketing, financial services marketing, government or public sector marketing, events marketing, sports marketing, and even religious marketing. Social marketing came about as marketers and social change practitioners began to apply marketing techniques to achieve socially desirable goals.

Religious marketing?

While there may be some argument as to whether the Church of Scientology (COS) constitutes a genuine religion, the Church recently commenced a television advertising campaign promoting Scientology as the answer to those seeking the 'truth'. Interestingly, given the Church's strident opposition to medication, the execution of the ad has been described as very similar to a much prescribed anti-depressant drug (with the implication that it offers the same benefits) (Edwards 2009a).

Free beer at church?

Taking a different approach, concerns over the lack of men attending services year-round has led Church of England clergy in the UK to offer a range of incentives for fathers attending church on Father's Day, including free beer, bacon rolls and chocolate bars. Men at St Stephen's church in Barbourne, Worcester, for example, will be handed bottles of beer by children during the service – although we are reassured that a prayer will be said for the fathers before the beer is distributed. (No doubt the singing will benefit.)

Not unexpectedly, the plan to distribute beer has upset groups working against alcohol abuse, but the Bishop of Worcester said that it could help churches to attract more men, arguing that the free beer was intended to be symbolic of "the generosity of God" (Wynne-Jones 2009).

What distinguished early social marketing efforts from other areas, was that they were not for commercial profit, nor were they promoting a particular organisation (the domain of not-for-profit marketing). Rather, social marketing campaigns appeared to be conducted for the common good.

Incidentally, just as many original applications of consumer goods marketing to other business areas failed (see Baker 1996), so too have many attempts to apply marketing to social causes. However, this is not because the principles and tools of marketing are inappropriate in these areas, but because marketing concepts and techniques have been misinterpreted or poorly applied. Too many early (and recent) social marketing campaigns were conducted by health and social policy professionals who lacked marketing expertise, or were led by marketing or advertising professionals who lacked an understanding of the health or social policy area in question. Given that the most visible aspect of consumer goods marketing was advertising, many 'uses' of marketing simply involved the addition of advertising to the organisation's promotional strategy. A classic example was that of the early adoption of 'marketing' by universities to compete for students. This generally involved the appointment of a 'marketing manager', the creation of a slogan and the advertising of their various courses – with too little regard for factors such as teacher quality, timetabling, job opportunities, relevance of course content, etc.

Social marketing was first defined by Kotler and Zaltman (1971) as 'the design, implementation and control of programmes calculated to influence the acceptability of social ideas and involving considerations of product planning, pricing, communications and market research'. They referred to social marketing as simply the application of the principles and tools of marketing to achieve *socially* desirable goals, that is, benefits for society as a whole, rather than for profit or other organisational goals

An often cited definition in the past decade has been Andreasen's (1995): 'Social marketing is the application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programmes designed to influence the voluntary behaviour of target audiences in order to improve their personal welfare and that of their society.' We have previously preferred Kotler and Zaltman's definition because of its simplicity and wide generalisability. For example, in this view, a health promoter's use of sponsorship (a marketing tool) to ensure that entertainment venues are smoke free or that healthy food choices are available, is an example of 'social marketing'. Kotler and Zaltman's definition also avoids unnecessary and generally unhelpful definitional debates.

We consider Andreasen's definition unduly constrictive in its apparent emphasis on *voluntary* behaviour change of individuals in the general population and their own welfare. For example, a social marketing campaign with an end goal of individuals consuming less saturated fat, might also target biscuit manufacturers to persuade them to replace saturated fats in their products with polyunsaturated fats. While this requires a voluntary behaviour change among the food company executives, the end consumers' change in saturated fats intake is involuntary. Furthermore, from our point of view, if the social marketers lobbied legislators to enforce such substitutions (i.e., individual voluntary behaviour by legislators, involuntary by food manufacturers and their consumers), this would still be social marketing.

> **Defining social marketing**
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> The social marketing listserv has a burst of activity every so often with respect to 'defining social marketing'. Much of this is semantic, with various contributors taking perhaps perverse intellectual delight in trying to think of exceptions to whatever definition is proposed by someone else. We think that the vast majority of social marketing practitioners have been doing quite well without a precise definition of each and every word, and pedantic posturing serves little useful purpose.

This 'voluntary' restriction is somewhat inconsistent with the practice of marketing anyway. For example, commercial sponsors of events often negotiate exclusive merchandising arrangements, such that the customer has little or no choice but to consume the sponsor's product at the sponsored event. For example, commercial sponsors in US schools have exclusive merchandising contracts, and for the 2000 Olympics, the only credit card accepted by the ticketing agency was Visa (an

Olympic sponsor). Similarly, health promoters use sponsorship agreements to ensure that healthy food choices are available in entertainment venues, that the venues are smoke free and that access is available to people with disabilities (see Chapter 13). That is, individuals who are in a position to make policy or regulatory decisions are important target audiences, in addition to individuals changing their own risky behaviours.

Hence, we would modify Andreasen's definition by adding 'involuntary' and expanding it to include those who make decisions that affect the welfare of others, thus de-emphasising the targeting of individuals to change their personal risk behaviours in keeping with Andreasen's (2006) emphasis: 'Social marketing is the application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programmes designed to influence the voluntary or involuntary behaviour of target audiences in order to improve the welfare of individuals and society.'

We further extend this definition to accommodate two key points underlying this book's approach to social marketing, especially as we wish the field to develop:

• First, much of the debate about defining social marketing and the common good centres on how to establish this so-called 'common good' in pluralistic societies (i.e., 'who decides what is "good"?'). While we believe that this is rarely an issue in practice, we propose the UN Universal Declaration of Human Rights (www.unhchr.ch) as our baseline with respect to the common good.
• Second, most social marketing to date, particularly in the public health and injury prevention areas, has focused on achieving individual behaviour change, largely independent of the individual's social and economic circumstances. There is now overwhelming evidence that various social determinants influence health over and above individual behavioural risk factors and physical environment risk factors (Wilkinson and Marmot 1998). These social determinants result from the social structure of society in (interrelated) areas such as the workplace, education, literacy and community cohesion. Hence, we see a primary future goal of social marketing as achieving changes in these social determinants of health and wellbeing (Donovan 2000b; Mechanic 1999).

That is, our view is that the domain of social marketing is not just the targeting of individual voluntary behaviour change and changes to the environment that facilitate such changes, but the targeting of changes in social structures that will facilitate individuals reaching their potential. This means ensuring individuals' access to health services, housing, education, transport and other basic human rights that clearly impact on health status (Gruskin, Plafker and Smith-Estelle 2001). This will require the targeting of individuals in communities who have the power to make institutional policy and legislative change (Andreasen 2006; Hastings, MacFadyen and Anderson 2000).

Social marketing's beginnings

Social marketing has its roots in public education campaigns aimed at social change. Kotler and Roberto (1989) report campaigns in ancient Greece and Rome to free the slaves, and history records many attempts by governments in particular to mobilise public opinion or educate the public with respect to health or edicts of the government of the day. These efforts perhaps reached a peak of sinister sophistication with the expertise of Goebbels in Nazi Germany in the 1930s, and similar attempts by the Allies to rally their own populations to the war efforts in the 1940s (see Chapter 12). The propaganda expertise developed in the 1940s was then applied, initially mainly in the United States, to a series of topic areas such as forest fire safety, crime prevention, cardiovascular disease, and so on; and is perhaps most evident in the anti-smoking and HIV/AIDS campaigns of the 1990s that continue today.

Although some would argue that many of these early public education campaigns were primarily media campaigns rather than comprehensive 'social marketing' campaigns (Fox and Kotler 1980), they appeared to promote socially desirable products (e.g., war bonds) and attitudes (e.g., towards women working) in ways indistinguishable from commercial marketing. In any case, social marketing was being applied far more comprehensively in developing countries than in developed countries in the 1970s (Manoff 1985), in areas such as family planning, rat control and other hygiene/sanitation areas, agriculture and attitudes towards women (Rice and Atkin 1989).

The 1980s saw rapid growth, especially in Canada and Australia, in the application of marketing concepts to public education campaigns across a broad range of activities, including injury prevention, drink-driving, seat belt usage, illicit drugs, smoking, exercise, immunisation, nutrition and heart disease prevention (Egger, Donovan and Spark 1993; Fine 1990; Kotler and Roberto 1989; Manoff 1985; Walsh *et al.* 1993).

Egger and colleagues (1993) point to a number of factors influencing this:

- the realisation by behavioural scientists and health professionals that, while they were expert in assessing what people *should* do, they were not necessarily expert in *communicating* these messages, nor in *motivating* or *facilitating* behavioural change;
- the observed apparent success of marketing techniques in the commercial area, and the observation that the discipline of marketing provided a systematic, research-based approach for the planning and implementation of mass intervention programmes;
- epidemiological research findings about the relationships between habitual behaviours and long-term health outcomes led public health experts to implement campaigns aimed at preventing behaviours that resulted in the so-called 'lifestyle' diseases such as heart disease and cancer; and
- a focus on lifestyle diseases initially led to an emphasis on individual responsibility and individual behaviour change (Egger and colleagues imply that this was an undue emphasis), a view consistent with the capitalist philosophy of individualism and rational free choice, which many saw as synonymous with commercial marketing.

Some critics of social marketing (and health promotion) campaigns have claimed that this individual focus philosophy largely ignores the social, economic and environmental factors that influence individual health behaviours. While some social marketing campaigns deserve this criticism, this is not an inherent characteristic of marketing. One of the fundamental aspects of marketing – and, hence, *social* marketing – is an awareness of the total environment in which the organisation operates, and how this environment influences, or can itself be influenced, to enhance the marketing activities of the company or health agency (see Andreasen 2006; Buchanan, Reddy and Hossain 1994; Hastings and Haywood 1994). Our definition of social marketing explicitly acknowledges the influence of the social and physical environments on individual behaviour.

Social marketing: what it is – and what it is not

Although some argue about what is and is not *social* marketing, we take an eclectic, pragmatic and parsimonious view that what distinguishes social marketing from other areas of marketing is the primary end goal of the campaigners. If the Hungarian National Heart Foundation (HNHF), as part of the European Heart Health Charter were to undertake a campaign to reduce cardiovascular disease in the population by reducing the amount of trans-fats in people's diets, using advertising and promotions aimed at increasing fruit and vegetable consumption, and via lobbying manufacturers and fast-food outlets to reduce their use of saturated fats, this would be *social* marketing. The intended goal is increased health and wellbeing in the population at large. If the HNHF formed a partnership with various fruit and vegetable marketers in the above campaign, these commercial partners would not be engaging in social marketing. While the impact of increased fruit and vegetable consumption would have a desirable population health outcome, this is not the commercial partners' goal: their goal is increased profit via the partnership.

Not-for-profit marketing: This refers to not-for-profit organisations using marketing to achieve organisational goals. If Cancer UK were to undertake a fundraising and volunteer recruiting drive using direct mail and mass media advertising, this is not-for-profit marketing. While Cancer UK's overall aims are for the common good, raising funds in competition with other charitable organisations is an organisational goal rather than a 'common good' aim. Similarly, if a library used marketing techniques to build its customer base and attract funds to achieve its goals of growth and its positioning of having an up-to-date library of music videos and DVDs, this would be not-for-profit marketing. However, if the library undertook to increase the literacy of people in the community it served, and this was the primary aim of the programme, it would be engaging in social marketing. Such a programme might, of course, result in increased use of the library, but this would be a means to the primary goal.

Cause-related marketing: This refers to a commercial entity forming a partnership with a pro-social organisation or cause, such that sales of the commercial organisation's products benefit the pro-social cause (Webb and Mohr 1998). In some ways this is similar to sponsorship (or pro-social marketing; see below), where the pro-social organisation allows the commercial entity to promote its association with the pro-social organisation in order to improve people's attitudes towards the company and its products. The difference is that in cause-related marketing, the return to the pro-social organisation is directly related to product sales. Again this is not social marketing as the commercial organisation's main aim is to achieve increased sales or some other marketing objective; it is simply using the social goal as a means to this end.

Cause-related marketing has become relatively popular in the United States ever since 1983 when American Express offered to donate one US cent to the restoration of the Statue of Liberty for every use of its card, and US$1 for every new card. The company gave US$1.7 million to the restoration as consumer card usage increased by 27 per cent and new applications by 45 per cent. Recent examples are Dove's successful and much-lauded 'real women, real beauty' campaign that funds a self-esteem foundation for women, and P&G's 'One Pack = One Vaccine' campaign – where Pampers makes a donation to UNICEF equivalent to the cost of one tetanus vaccine for each pack of specially marked Pampers sold (Cone 2008). That initiative began in 2006 in the United Kingdom, and has since expanded to other countries in Western Europe, North America and Japan.

The 2008 Pampers campaign in North America, which featured actress and new mother Salma Hayek as spokesperson, reportedly generated funding for over 45 million vaccines. The initiative has expanded across Europe, Africa, the Middle East, Asia and North America, with approximately 100 countries participating in the 2008–9 campaign (www.unicefusa.org/hidden/pampers-usfund.html; accessed 16 June 2009).

> **Pink cans double soup sales**
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> While projects like the Pampers UNICEF campaign have obvious benefits to the recipients of the vaccination, these campaigns can be very profitable to the marketers. Campbell's soup sales to the Kroger supermarket chain doubled during the pink labelled Breast Cancer Awareness Month in 2006. After deducting 3.5 cents per can, this presumably leaves Campbell with a hefty profit from the promotion (Thompson 2006).

Pro-social marketing: This refers to a commercial organisation promoting a pro-social cause related in some way to its target audience. For example, Kellogg in Australia featured messages on its cereal products about bullying, targeting young children, and a message about folate from the Northcott Society for Crippled Children on its Guardian pack. It is also a major sponsor of the Surf Life Saving Association (Kellogg's 'Surf Safe Summer'). Pro-social marketing is similar to sponsorship in that the commercial