

Advancing Theory and Research in Social Marketing: Interactive Management for Complex Problem Thinking

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Acknowledgements

The research leading to these results has received funding from the European Community's Seventh Framework Programme (FP7/2007-2013) under grant agreement no 289066. Sea For Society (SFS) is a, Mobilization and Mutual Learning Action Plan (MMLAP) project under the "Science in Society" programme, bringing together 28 partners and associated partners from 12 countries in a dialogue process and joint actions to consider key questions, extract cross-cutting issues and propose challenge-driven solutions to ensure a sustainable management of marine ecosystem services by European citizens. This publication reflects the views only of the authors, and the European Union cannot be held responsible for any use which may be made of the information contained therein.

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Abstract

In recent critiques, criticisms and calls for advancement, three substantive issues challenge the domain of social marketing – exchange myopia, value-action gaps and micro level research. In this empirical paper, a European study emphasises the importance of shared marine ecosystems for society using *Interactive Management (IM)*, a scientific solution-seeking methodology that illustrates the ability to collectively visualise the structure of a shared problem, and use this collective intelligence to design solutions and intervention strategies for social action. The adoption of IM by social marketing is an approach to change cartography, which seeks to overcome the three dependent social marketing limitations that impede our ability to resolve complex or wicked problems in society such as obesity, climate change and sustainable marine ecosystems.

Introduction

Social marketing shoulders the responsibility of connecting individual behavioural change with social good, societal values and collective wellbeing. Yet limited success at producing effective and sustainable change taunts social marketers in the face of complex and wicked societal ills, as many interventions have narrow impact and insufficient reach (Stead *et al.*, 2007; Langford and Panter-Brick, 2013). In response, this paper highlights three substantive issues - exchange myopia, value-action gaps and micro level research - in recent critiques, criticisms and calls for advancement, for a more sophisticated social marketing (Dibb, 2014; Hastings and Domegan, 2014). To address these conceptual challenges and move from abstractions to an empirical illustration, the paper next describes *Interactive Management, (IM)* a scientific solution-seeking methodology, along with its recent EU application. The paper closes with a discussion of the theoretical and methodological contributions of adopting a wider and holistic approach in social marketing, such as those highlighted by IM, to grapple with complex or wicked problems such as obesity, climate change and sustainability.

Social Marketing: Recent Critiques, Criticisms and Calls for Advancement

Three substantive issues, from recent health and environmental critiques, combined with increasing criticisms and calls for advancement in social marketing, illustrate the theoretical and research advancements that confront 21st century social marketing. The first comes from social marketing's theoretical myopia with exchange; the second stems from the related and emerging understandings of value-action gaps, as seen in Zainuddin (2013) and Gordon's (2012) studies; and the third concern, a methodological one, comes from the dominance of micro-level and formative research in social marketing practice.

The first substantive issue for theory advancement goes to the essence of social marketing – its exchange paradigm. “Exchange theory does not replace or supersede other behavioural theories, but its premise of mutually beneficial rewards is central to social marketing's change agenda. Without exchange theory, there is no social marketing” (Hastings and Domegan, 2014, p.73). The rhetoric of social marketing may undoubtedly concern behaviour change, theories, research and segmentation, but the reality is, that all too often in social marketing there is an absence of exchange theory. Rundle-Thiele (2014) confirms this absence of exchange theory in social marketing with only 33% of alcohol prevention, 32% of nutrition

and 22% of smoking interventions reporting use of exchange. The takeaway message - advancements in social marketing will be inherently limited without exchange theory. A key element of expanding social marketing theory – and this paper – is, then, exchange theory, as it can help people strive towards achieving social cohesion, not corporate power and selective enrichment (Hastings and Domegan, 2014).

The second substantive issue for social marketing, identified by Brenkert in 2008, intensifies when we conceptually connect exchange theory with emerging value constructs. Values in social marketing are “highly individualised, subjective and based upon experiences, actual and perceived” (Hastings and Domegan, 2014, p.270). The lessons from social marketing studies on value-in-use (experiential values) and perceived value (value-in-behaviours) (Domegan *et al.*, 2013; Zainuddin 2013; Gordon, 2012) state that interventions should engage with value discovery and justification, or experience the inability to unify values, attitudes, beliefs, actions and behaviours with wider social determinants to close value-action gaps. How so? Crawshaw (2012, p.206) explains when he says “powerful competing discourses are overlooked in favour of the presumption of shared beliefs, values and motivations and ultimately the ability to change”. The under-researching of value and behaviour change constructs perpetuates a neutral value or value free social marketing – where both constructive and destructive values can be activated in poorly thought out, exchange lacking interventions. This accelerates the dominant neo-liberalism societal paradigm with its magnifying self-enhancing consumption value effects or what is termed the ‘entrepreneurial self’ e.g. financial success and materialism. Intervention evidence suggests *i-values* versus *we-values* can spill over and lead to decollectivisation e.g. less community involvement and a lack of environmental respect (Gurrieri *et al.*, 2014; Corner and Randell, 2011).

The third and final issue; a methodological one, is about the dominance of micro-level research in social marketing. It results in a scarcity of multiple levels research at a time when social marketing is increasingly faced with complex and wicked problems. Dhalokia (2012, p.220) summarises the micro-macro dilemma well as “micro-research adventures are admirable but the deprecation of macro-research endeavours is not”. Social marketing researchers such as Dresler-Hawke and Veer (2006); Spotswood and Tapp (2013); Hastings and Domegan (2014) acknowledge the limitations of micro studies and call for research at multiple levels – micro, meso and macro – to uncover otherwise hidden links and processes that remain concealed when research is restricted to one level (Gurrieri *et al.*, 2014). Social marketing theory and research needs the ability to collectively visualise the structure of a shared problem and use this knowledge to design solutions and strategies for collective action.

To avoid simplistic and reductionistic approaches to complex and bigger-than-self problems, social marketing seeks theoretical diversity and the balancing of behavioural change with social change. To achieve this theoretical diversity this paper next describes *Interactive Management, (IM)* a scientific solution-seeking methodology to social change, along with a recent EU application to address each of the three substantive issues outlined above.

Interactive Management (IM): A Solution-Seeking Methodology for Complex Problems

When working with groups to facilitate complex problem thinking in order to create mutually beneficial exchanges based on new shared values, we believe it is important for social marketing to facilitate joint actions by a variety of stakeholders across and between sectors, communities, networks and countries. We believe that research *with* societal stakeholders into

the description and design of problems, solutions and policies is fundamental to social marketing's theoretical expansion and societal progress. From a research perspective, it's critical to have (1) a facilitation team that helps to structure group deliberations using (2) group methodologies, including software support systems that help with generating, categorizing, structuring, and sequencing ideas and developing action agendas in the context of (3) a productive workshop space. There are a variety of different methods that can be used to facilitate complex problem theory and research in this regard.

In Europe, we have used *Interactive Management* (IM) developed by John Warfield (1974). IM is a computer facilitated thought and action mapping technique that helps groups to develop outcomes that integrate contributions from individuals with diverse views, backgrounds, and perspectives. IM has been applied in a variety of situations to accomplish many different goals, including designing a national agenda for pediatric nursing (Cromer and Feeg, 1988), promoting world peace (Christakis, 1987) and improving the Tribal governance process in Native American communities (Broome, 1995). The theoretical constructs that inform IM draw from both behavioural and cognitive sciences, with a strong basis in general systems thinking. The IM approach carefully delineates content and process roles, assigning to participants responsibility for contributing ideas and to the facilitator, responsibility for choosing and implementing selected methodologies for generating, clarifying, structuring, interpreting, and amending ideas.

The application of IM in this study followed a typical IM session (see Figure 1) where a group of participants (N = 12-21) who are knowledgeable about a particular situation engage in a five step process to: (1) generate and clarify ideas; (2) vote, rank order, and select ideas for structuring through group discussion and multi-voting procedures; (3) structure ideas using IM software; (4) evaluate the graphical structural map with the group and amend if necessary; and (5) transcribe group discussion, explore the discourse and reasoning to further understand the nature of group thinking. The IM session then closes and the group leaves with a comprehensive action plan, detailing a specific set of goals to work on and a roadmap describing how all the various participant goals will work together to resolve the behavioural problem under investigation.

The sampling strategy defined knowledgeable participants selected for this EU IM study as societal (rather than sectoral) stakeholders, who were then classified as primary (p), secondary (s) or influencers (i). Primary societal stakeholders were those groups whose economic and societal welfare was dependent on the oceans, e.g. fishermen, aquariums, naval service and City Councils. Secondary societal stakeholders were actors whose economic and societal welfare was dependent on the economy of the primary stakeholders, e.g. hotels, beach artists and environmental agencies. Societal influencers were those who influenced ocean activities but were not dependent on the sea for their economic and societal welfare, e.g. researchers, the media and the government (N = 249; 83p; 83s and 83i).

Results

Figure 2 illustrates an IM structural map, generated by participants at one EU consultation (September, 2013, n = 15; 5p; 5s and 5i) who responded to a specific trigger question - *What are the Barriers to a Sustainable Marine Ecosystem in Food Supply?* The structural map is to be read from left to right, with paths in the model interpreted as 'significantly aggravates'. Boxes with two or more elements together indicate reciprocally inter-related elements.

In this particular structural map, a ‘lack of vision by policy makers towards the sea’ significantly aggravates ‘lack of interdisciplinary research – marine, science, ecology, economics’. Barriers grouped together in the same box, such as ‘lack of vision by policy makers towards the sea’, the country ‘suffers from sea blindness’ and ‘lack of standalone marine department with sufficient weight’ are reciprocally inter-related and they significantly aggravate one another. Three different barrier aggravation pathways are evident in Figure 1, with directional arrows indicating aggravating barriers.

Figure 1: Steps in the IM Process

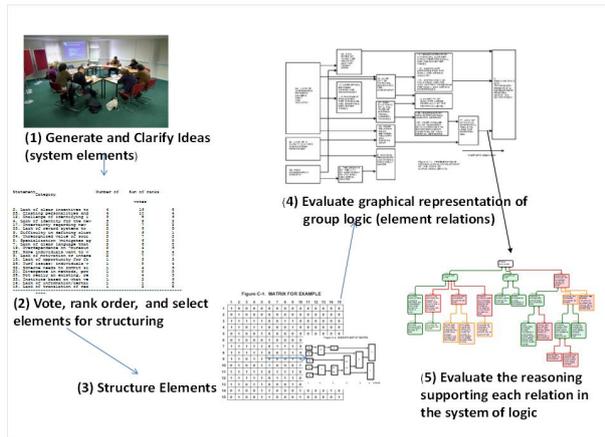
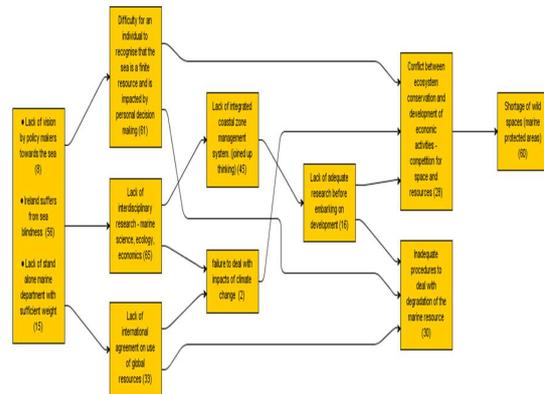


Figure 2: A Structural Barrier Map for Food Supply



Discussion

Utilising the group strengths of IM, from its behavioural and cognitive sciences foundation with its methodological abilities to separate content and process roles, IM offers the potential to advance social marketing’s exchange paradigm through a management lens by narrowing the value-action gaps and providing an innovative, validated empirical meso and/or macro alternatives to micro-level research in social marketing.

IM taps into a broadened concept of exchange from a societal (rather than a sectoral) stakeholder level, as richer understandings are derived from the synergies of intelligence, expertise and lived experiences of each societal stakeholder around the complex problem. Deeper economic and social exchange insights also come from societal stakeholders working together to develop shared understandings of the problem, addressing the ‘what’ and ‘how’ of the problem and seeking a set of solutions matched to the complexity of the social issue. As can be seen in this IM application, stakeholder consultations can provide valuable input that can be used to advance a ‘mutually’ understood and ‘mutually’ beneficial exchange agenda for social marketing.

IM consultations can narrow the value-action gaps by identifying and mapping *we-values* and potential propositions of stakeholders. Arising from the IM process, *we-values* supersede *i-values* as a result of interpersonal communications fostered through a democratic, consensus building process that facilitates buy-in and enhances the legitimacy of decision-making groups. The exchange of diverse sets of intelligence and lived experiences adjusts the ways in which participants reflect upon their own values, by considering conflicting value sets and modulating their individual views with the group’s collective value-actions, creating *we-values* for stronger IM outputs i.e. the structural barrier maps and collective solution sets. When tackling global challenges such as obesity, climate change and sustainability, it is the

activation of these *we-values*, versus *i-values* in society that needs to form the basis of social marketing exchanges and interventions.

From a methodological stance, IM creates opportunities to merge data across multiple groups and analyse group differences and similarities using meta-analysis, given the standardized and structured approach used and provides an option to link qualitative structural models of system interdependencies to quantitative modelling efforts by drawing upon data from surveys and other forms of research. The meta-analysis is based upon thematic overlaps that provide insight into the levels of influence of each barrier at a group level. Furthermore, IM creates the ability to establish feedback loops between multiple working groups and multiple levels of analysis such that: (a) there is growing awareness amongst societal stakeholders of a diversity of perspective, and (b) quantitative models are evaluated in light of qualitative reasoning and qualitative models are considered in light of rigorous quantitative analysis. A recent study by Chang (2010) compared the results of IM with Structural Equation Modelling (SEM) and found a high degree of consistency between models generated by participants in an IM session and quantitative relationships confirmed in SEM. Consistent with Maani and Cavana (2000), we believe that IM modelling can be used as a foundational step for groups that seek to develop consensus-based computational models in a team setting.

Finally, while not new to community social marketing or action research, IM is of value to the social marketer who seeks a research process which itself can yield intervention outcomes, engagement, participation and value enhancements. Knowledge sharing and learning is critical to addressing wicked problems in health and human services where the research itself is underpinned by an emphasis on raising participants' self-awareness and self-development.

Conclusion

It is time for the creativity and innovation of social marketing theory to be matched by equal creativity and innovation in its research, for change to be achieved. Many individuals, clients and stakeholders, are not conscious of how their *i-value* exchanges in their day-to-day actions and local communities can have a cumulative effect on our relationship with health, environment and society. The increasing complexity of social issues and wicked problems challenges social marketers to be innovative in how they use exchange theory, value constructs as well as in how they perform research. Going beyond micro-level research to macro-level insights, augmenting *what* the barriers, motivators and value facilitators to exchange are, with mapping and measuring *how* they are interrelated, together with the identification of a range of solutions, moves social marketing forward through a management lens. The use of IM in this EU application identified the cross-cutting behaviours to be addressed, which have influenced the mobilisation-to-action plans currently being designed to implement across Europe in 2015 in order to move towards a sustainable marine ecosystem.

To conclude, a fundamental aspect of theory expansion for social marketing is the ability to collectively visualise the structure of a shared problem, and use this knowledge to design solutions and strategies for collective exchange action. In this paper, we described an approach to change cartography that seeks to overcome three dependent social marketing limitations which impede our ability to resolve complex problems: poor critical exchange thinking, limited value constructs and scales to facilitate group coherence, consensus design and collective action, and a lack of macro research methodology capacities. Interactive management (IM), a solution-seeking methodology represents a social marketing advancement in theory and research to address complex social ills.

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Response to Review Feedback

Review 1:

We thank the reviewer for the very valuable feedback which we have used to bring greater clarity and readability to the paper. The paper has been edited in recognition of the comments and recommendations suggested by Reviewer 1.

- We have edited the value-action paragraph in the discussion section to explain more clearly how the transformation of i-values into we-values produces stronger IM outputs/results, i.e. we-value based structural barrier maps and solution sets for moving forward.
- The paper has been thoroughly edited to increase the readability off all sections and sentences.
- We have also reduced the use of direct quotations in sections as requested.

Review 2:

We thank the reviewer for the very valuable feedback which we have used to bring greater clarity to our paper. The paper has been edited in recognition of the comments and recommendations suggested by Reviewer 2.

- In response to the valuable comment on taking a theory use in social marketing and then to position our work as contributing to social marketing through a management lens - the paper uses exchange theory as its social marketing theory but we do acknowledge that the use of the Interactive Management (IM) Methodology allows social marketing to better understand exchange theory and the exchange paradigm through a management lens (please see the first paragraphs of the discussion and conclusion sections). Given the specific guidelines on formatting and the lack of space to extensively discuss this comment, we will draw more importance to this management contribution and the Luca and Suggs (2013) paper in the presentation of the paper at the WSM Conference.
- In relation to the use of meta-analysis, we have incorporated an additional sentence to clarify our positioning on the use of meta-analysis in the discussion section. Again, due to the 5 page limit, this recommendation cannot be explained in greater detail but we will explain fully the analytical components to this project in our presentation at the WSM Conference in April.
- In response to the point asking if the use of IM improved behaviour change outcomes - at the time this paper was written, this project had just finished the complete analysis of the IM process. This EU project is currently at its mobilisation-to-action phase, where in 12 months time following the mobilisation campaigns and initiatives, evaluations will be completed on examining the effectiveness of an IM approach in attaining (or not) behavioural change in the marine sector.
- In response to the we-values suggestion, we have added sentences to the value-action paragraph to explain more clearly how participation in an IM process transforms i-values into we-values which in turn produces stronger IM outputs/results such as we-value based structural barrier maps and solution sets for moving forward.