Editorial: Nothing about us without us: participatory design application in social marketing

Social marketing has long been hailed as a consumer centric alternative to the expert-led, top-down approaches that have traditionally dominated health promotion and public policy (Lefebvre and Flora, 1988). Indeed, social marketing, when applied to its fullest extent, has demonstrated effectiveness in achieving behavioural objectives set (Carins and Rundle-Thiele, 2014; Dietrich *et al.*, 2016; Firestone *et al.*, 2017; Kubacki *et al.*, 2015; Schmidtke *et al.*, 2021; Truong, 2014; Xia *et al.*, 2016). The field has, however, been criticised for its ethicality (Kennedy and Santos, 2019). Specifically, concerns have been raised regarding the use of fear appeals (Hastings *et al.*, 2004), harmful awareness raising (Pettigrew *et al.*, 2010), tokenistic use of empowerment (Kamin *et al.*, 2022), promotion of othering (Skinner, 2017) and exacerbating health inequities (Langford and Panter-Brick, 2013). While social marketers are not intentionally unethical, unintended consequences still occur (Kennedy and Santos, 2019). Transformative social marketers believe real social change emerges from participatory actions and community learning that are meaningful and deliver value to all (Saunders *et al.*, 2015). By drawing on participatory principles, mindsets, frames and behaviours, social marketers can work with (not for) people to identify strategies and solutions that are most likely to lead to changes benefiting individuals, society and the planet.

To shape the future of social marketing towards a more participatory approach, the field must look beyond its traditional disciplinary bounds. Participatory design (PD) is an umbrella term that encompasses a broad range of human-centred (see also citizen, consumer, person, user-centred) approaches and methods (Cargo and Mercer, 2008; Halskov and Hansen, 2015), all varying in their extent of participant involvement. Broadly, PD refers to the involvement of both designers and intended end users of a product, service or programme in a cooperative design process (Halskov and Hansen, 2015). PD is considered a useful method for engaging those affected by a given problem at the grassroots level and ensuring end user context forms the fundamental starting point of the design process (Halskov and Hansen, 2015). Although evaluations are limited, PD has demonstrated potential for improving outcomes such as programme adoption, engagement, satisfaction and retention (DeSmet *et al.*, 2016; Willmott *et al.*, 2022a, 2022b). However, several issues have been raised with the application of PD within social and behavioural change contexts.

Although participation is a fundamental human right (United Nations, 2019), evidence suggests current definitions of "participation" and its application vary considerably. A recent systematic review of PD application in youth sexual violence and abuse prevention revealed a lack of studies explicitly defining the method of PD applied (Willmott *et al.*, 2022a, 2022b). PD application was also found to encompass a broad range of approaches including formative research (e.g. ethnography, interviews and focus groups), stakeholder consultations and collaborative partnerships, usability and prototype testing, train-the-trainer models, peer leadership and education, youth participatory action research (Y/PAR) and community-based participatory research (CBPR). Across the PD methods applied, several participant and researcher roles ("agents of change") were identified including informants, consultants,

This paper forms part of a special section "Nothing about us without us: participatory design application in social marketing", guest edited by Taylor Jade Willmott, David James Schmidtke and Sinead McLeod.

co-designers, testers and leaders/trainees. According to the Methodology, Agent of Change, Training, and Engagement (MATE) taxonomy (Willmott *et al.*, 2022a, 2022b), engagement varies depending on the level of agency, input and empowerment afforded by the PD method applied. For example, conducting surveys to obtain insights from end users would be considered a low level of engagement, whereas Y/PAR and CBPR approaches would be considered a high level of engagement. Although PD methods yielding higher levels of engagement among end users are increasingly being applied, a significant gap in knowledge remains regarding how, why and when to apply these methods.

As participation has evolved to take on new meanings and incorporate new perspectives, there have been calls to critically assess whether the core principle of PD – involvement of intended end users and other key stakeholders in design processes – holds up in practice (Robertson and Simonsen, 2012; Vines *et al.*, 2013). Moreover, as the range of PD methods being developed and appropriated by different fields increases, there is a need for greater critique and reflection on how PD and related approaches are used and communicated in social marketing. Importantly, there is a need to advance current understandings of how to enable and prompt meaningful participation to ensure people feel empowered to understand, realise and claim their right to participation (Willmott *et al.*, 2022a, 2022b).

In this special issue for the *Journal of Social Marketing*, we called for papers applying PD methods within the design, implementation and evaluation of social marketing programmes. The guest editorial team comprised social marketing academics and practitioners with synergistic expertise in PD methods. Lived experience experts were also consulted. Subsequently, all papers accepted for publication have been reviewed for both academic rigour and practical relevance. Our aim was to stimulate discourse within and beyond the social marketing discipline on the role and importance of PD in behavioural and social change initiatives, establish standards of practice for the field, showcase best practice case studies and identify priorities for future research and practice.

In "Rapid iterative application of the Co-create, Build, Engage (CBE) framework: Development of Blurred Minds Vaping and the Environment module", Rundle-Thiele *et al.* (2021) provided an extensive step-by-step outline of how the CBE framework can be iteratively applied to develop social marketing interventions for the betterment of individuals, society and the planet. The authors undertook two sequential studies. In the first study, Khan and Rundle-Thiele detailed a seven step co-design process applied to identify actions that can be taken to tackle the issue of vaping and gain feedback from high school students on the Blurred Minds Academy vaping module. In the second study, the authors report the design of a new Blurred Minds Academy module educating high school students about the environmental impacts of vaping. There has long been criticism over the lack of practical relevance in scholarly work in marketing (Conduit *et al.*, 2022). This paper addresses this gap between academia and practice by placing the managerial agenda at the forefront, providing social marketing researchers and practitioners with a beneficial method and best-practice example to draw from in their own PD efforts.

In "Collective intelligence: Changing the way things are done with participatory design", Brennan and colleagues described their application of the UK Design Council's double diamond method to engage industry in a sector-wide response to tackling consumer food waste. The study underpinning this paper is part of a larger collective-intelligence-participatory design (CIPD) project focused on the role of packaging in reducing consumer food waste. The authors describe how the double diamond process of divergence and convergence supported insight generation and facilitated the emergence of a path forward in terms of addressing the complex problem of consumer food waste. The paper highlights the importance of engaging a collective across a PD process to garner greater diversity of thought, and in turn, identify the most viable path forward

by seeking optimisation and satisficing rather than consensus. As the authors suggest, collective intelligence gathering approaches legitimatise outcomes arising from PD processes such as the double diamond method. The paper further emphasises the importance of cooperation and coordination in the CIPD process while acknowledging the challenge of coalescing multiple varied perspectives and ensuring they are adequately represented in a resultant solution. Importantly, this paper demonstrates how PD approaches such as the double diamond method can shift the attitudes and perspectives of participants engaged in an iterative design process. In sum, this paper provides a useful method and illustration on how social marketers and practitioners can engage multiple stakeholders in a PD process and deliver systemic solutions.

In "Tackling the social marketing formative research bottleneck: Comparative analysis of the complementary nature of community-generated personas and focus groups", Khaliq and colleagues described a comparative analysis of personas created by community-based organisations and formative research focus groups conducted with a Hispanic/Latino population in the USA. In the context of COVID-19 vaccine uptake, the authors find the two methods of PD to be complementary (rather than substitutionary) with a high level of agreement on core values motivating, guiding and sustaining the target population. Findings support community-generated personas as a valuable tool for data generation when time and resources are limited. As the authors write, "While the personas provided a better overview of the target group's experiences and values, the focus groups provided depth in understanding causality and sequence of events." Moreover, cultural personas connecting meanings, values and actions among the target population can promote more effective communication practices in diverse communities. Interestingly, Khaliq and colleagues discussed how cultural personas effectively informed subsequent formative research design and priority setting, contradicting the typical standard of practice where formative research precedes persona building. The agile nature of persona building is uniquely suited to responding to public health and other crises. Although engagement varies based on the level of agency, input and empowerment afforded by a given PD method (Willmott *et al.*, 2022a, 2022b), viewing PD methods as substitutionary rather than complementary compromises the depth of audience insight and orientation. This paper demonstrates how different PD methods offer complementary value with each generating unique insights on target population values, motives and behaviours.

In "Transformative social marketing and social innovation for sustainable development through participatory design with economically marginalized users", Juusola and colleagues spotlight the value PD with marginalised citizens can bring to achieving social marketing objectives. The paper provides nuanced insights, as it pertains to the challenges and outcomes of PD with marginalised citizens across different stages of social innovation. First, the importance of understanding cultural norms of marginalised citizens was found to be an essential foundation block needed for PD to take place. Second, the challenge relating to marginalised user buy-in was highlighted. Knowledge sharing, experimenting with marginalised users and reflection were found to be integral in achieving product solution acceptance. Finally, the challenge of scaling up social innovations arising from PD was discussed. As the authors argue, there is a greater need for PD approaches that involve a diverse range of stakeholders (e.g. non-governmental organisations, government, universities and volunteers) for systemic change to be achieved. This paper widens the scope of PD in social marketing, demonstrating its capacity to overcome challenges and achieve positive social innovation outcomes by working with marginalised citizens in a Global South context, a segment that has been largely ignored in previous work.

Concluding remarks and future research directions
In summary, PD encompasses a range of methods yielding varying levels of engagement with the target audience. The papers published in this special issue highlight this variability

and demonstrate how PD may be applied across a range of contexts including vaping, vaccination, food waste and social innovation. Importantly, they emphasise the value PD methods offer when designing products, services and programmes for disadvantaged and marginalised populations. Much of the products, services and programmes in contemporary marketplaces have been designed based on the needs and preferences of advantaged populations. Such products, services and programmes do not often meet the unique needs of disadvantaged and marginalised populations. As noted by Juusola and colleagues, findings of PD-based studies may not be expected to generalise to other populations and settings, but their relatability is likely to be significant. We argue that it is the process and lessons learned from PD application that must be shared in a more consistent, transparent and replicable manner. A lack of generalisability in outcomes should not mean a lack of scientific rigour in process. Recent research indicates that the process of participating in the design of products, services and programmes can be empowering for end users (Willmott *et al.*, 2022a, 2022b). Consequently, we call for more research reporting process evaluations of PD application with a focus on participant experiences. Mapping participant experiences with measured programme outcomes will provide further insights into the value of PD application in social marketing. Reflection will be an important part of evaluating PD processes and progressing their application in social marketing. Aligning with the transformative school of thought, we urge social marketing researchers and practitioners to critically reflect on the PD methods they are applying to ensure their engagement with end users and other key stakeholders is meaningful and delivers value to all. Participants should be encouraged to reflect on their experiences of participating in a PD process. By the same token, researchers must reflect on how they are supporting participants to claim their right to participation and feel empowered throughout a PD process. Such reflective practice should feature across the life of a PD project and lead to improvements in future applications.

Although the papers included in this special issue provide valuable examples of PD application, gaps remain in our understanding of the true value and impact of PD in social marketing. Longitudinal studies with mixed method designs evaluating PD application over time are needed. As Khaliq and colleagues demonstrate, there is merit in comparing different PD methods. In most cases, PD methods are complementary rather than substitutionary. Understanding how, why, and when PD methods are most effective warrants further investigation. A potential barrier to conducting PD is that implementing the method with end users can be more resource intensive compared with other approaches (e.g. surveys). Future research could seek to develop tools and methods of PD that are less costly to deliver, without compromising on its utility. Finally, we encourage social marketers to be innovative in their application of PD methods and report both their successes and failures to advance the field.

Taylor Jade Willmott
Department of Marketing, The University of Adelaide, Adelaide, Australia

David James Schmidtke
Department of Marketing, University of the Sunshine Coast,
Sunshine Coast, Australia, and

Sinead McLeod
Independent Senior Strategist, Wellington, New Zealand

References

Cargo, M. and Mercer, S.L. (2008), "The value and challenges of participatory research: strengthening its practice", *Annual Review of Public Health*, Vol. 29 No. 1, pp. 325-350.

Carins, J.E. and Rundle-Thiele, S.R. (2014), "Eating for the better: a social marketing review (2000-2012)", *Public Health Nutrition*, Vol. 17 No. 7, pp. 1628-1639.

Conduit, J., Lu, V. and Veer, E. (2022), ("Re) gaining our voice: future of marketing in Australasia", *Australasian Marketing Journal*, Vol. 30 No. 3, pp. 168-177.

DeSmet, A., Thompson, D., Baranowski, T., Palmeira, A., Verloigne, M. and De Bourdeaudhuij, I. (2016), "Is participatory design associated with the effectiveness of serious digital games for healthy lifestyle promotion? A meta-analysis", *Journal of Medical Internet Research*, Vol. 18 No. 4, p. e4444.

Dietrich, T., Rundle-Thiele, S., Schuster, L. and Connor, J.P. (2016), "A systematic literature review of alcohol education programmes in middle and high school settings (2000-2014)", *Health Education*, Vol. 116 No. 1, pp. 50-68.

Firestone, R., Rowe, C.J., Modi, S.N. and Sievers, D. (2017), "The effectiveness of social marketing in global health: a systematic review", *Health Policy and Planning*, Vol. 32 No. 1, pp. 110-124.

Halskov, K. and Hansen, N.B. (2015), "The diversity of participatory design research practice at PDC 2002–2012", *International Journal of Human-Computer Studies*, Vol. 74, pp. 81-92.

Hastings, G., Stead, M. and Webb, J. (2004), "Fear appeals in social marketing: strategic and ethical reasons for concern", *Psychology and Marketing*, Vol. 21 No. 11, pp. 961-986.

Kamin, T., Kubacki, K. and Atanasova, S. (2022), "Empowerment in social marketing: systematic review and critical reflection", *Journal of Marketing Management*, Vol. 38 Nos 11/12, pp. 1-33.

Kennedy, A.M. and Santos, N. (2019), "Social fairness and social marketing: an integrative justice approach to creating an ethical framework for social marketers", *Journal of Social Marketing*, Vol. 9 No. 4, pp. 522-539.

Kubacki, K., Rundle-Thiele, S., Pang, B. and Buyucek, N. (2015), "Minimizing alcohol harm: a systematic social marketing review (2000–2014)", *Journal of Business Research*, Vol. 68 No. 10, pp. 2214-2222.

Langford, R. and Panter-Brick, C. (2013), "A health equity critique of social marketing: where interventions have impact but insufficient reach", *Social Science and Medicine*, Vol. 83, pp. 133-141.

Lefebvre, C.R. and Flora, J.A. (1988), "Social marketing and public health intervention", *Health Education Quarterly*, Vol. 15 No. 3, pp. 299-315.

Pettigrew, S., Pescud, M. and Donovan, R.J. (2010), "Children's perceived and ideal body images: social marketing implications", *International Review on Public and Nonprofit Marketing*, Vol. 7 No. 1, pp. 11-19.

Robertson, T. and Simonsen, J. (2012), "Challenges and opportunities in contemporary participatory design", *Design Issues*, Vol. 28 No. 3, pp. 3-9.

Rundle-Thiele, S., Dietrich, T. and Carins, J. (2021), "CBE: a framework to guide the application of marketing to behavior change", *Social Marketing Quarterly*, Vol. 27 No. 3, pp. 175-194.

Saunders, S.G., Barrington, D.J. and Sridharan, S. (2015), "Redefining social marketing: beyond behavioural change", *Journal of Social Marketing*, Vol. 5 No. 2, pp. 160-168.

Schmidtke, D.J., Kubacki, K. and Rundle-Thiele, S. (2021), "A review of social marketing interventions in low- and middle-income countries (2010–2019)", *Journal of Social Marketing*, Vol. 11 No. 3, pp. 240-258.

Skinner, H. (2017), "Action research", in Kubacki, K. and Rundle-Thiele, S. (Eds), *Formative Research in Social Marketing: Innovative Methods to Gain Consumer Insights*, Springer Singapore Pte., Singapore, pp. 11-31.

Truong, V.D. (2014), "Social marketing: a systematic review of research 1998–2012", *Social Marketing Quarterly*, Vol. 20 No. 1, pp. 15-34.

United Nations (2019), "Meaningfully engaging with youth: guidance and training for UN staff", *UNESCO*, available at: www.un.org/development/desa/youth/wp-content/uploads/sites/21/2021/05/Meaningfully-engaging-youth-Guidance-training-UN-staff.pdf

Vines, J., Clarke, R., Wright, P., McCarthy, J. and Olivier, P. (2013), "Configuring participation: on how we involve people in design", Proceedings of the SIGCHI Conference on Human Factors in Computing Systems, pp. 429-438.

Willmott, T.J., Hurley, E. and Rundle-Thiele, S. (2022a), "Designing energy solutions: a comparison of two participatory design approaches for service innovation", *Journal of Service Theory and Practice*, Vol. 32 No. 3, pp. 353-377, doi: 10.1108/JSTP-03-2021-0040.

Willmott, T.J., Mathew, A., Saleme, P. and Rundle-Thiele, S. (2022b), "Participatory design application in youth sexual violence and abuse prevention: a mixed-methods systematic review", *Trauma, Violence, and Abuse*, Vol. 24 No. 3, p. 15248380221078891.

Xia, Y., Deshpande, S. and Bonates, T. (2016), "Effectiveness of social marketing interventions to promote physical activity among adults: a systematic review", *Journal of Physical Activity and Health*, Vol. 13 No. 11, pp. 1263-1274.

Further reading

Zainuddin, N. and Gordon, R. (2020), "Value creation and destruction in social marketing services: a review and research agenda", *Journal of Services Marketing*, Vol. 34 No. 3, pp. 347-361.